



Miami-Dade County

Strategic Sourcing: Create a New a RFI Event

Version 1.0


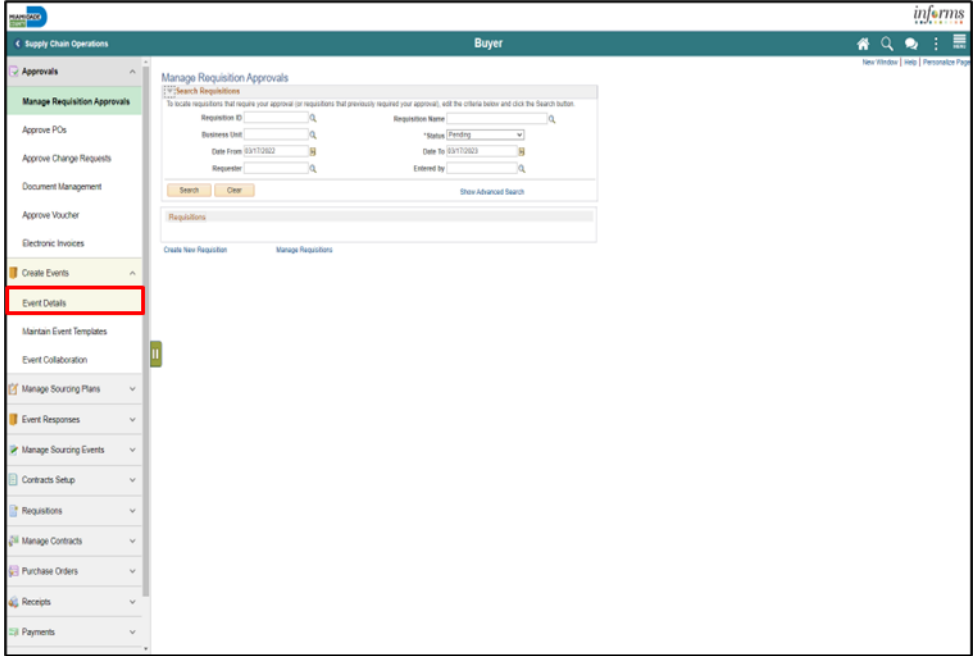
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PURPOSE AND DESCRIPTION

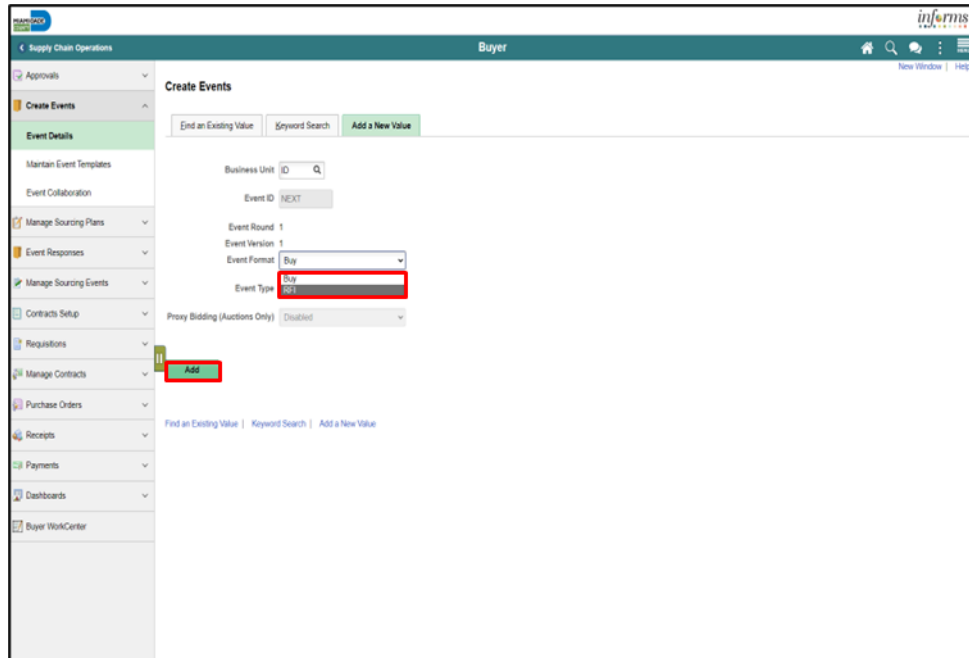
Purpose: This document explains the key activities involved in creating a new RFI event. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activity.

CREATE A NEW RFI EVENT

Step	Action
1.	Navigate to Finance / Supply Chain (FSCM) > Supply Chain Operations > Buyer
2.	<p>Select the Create Events pane.</p> 
3.	<p>Select the Event Details pane.</p> 

4.

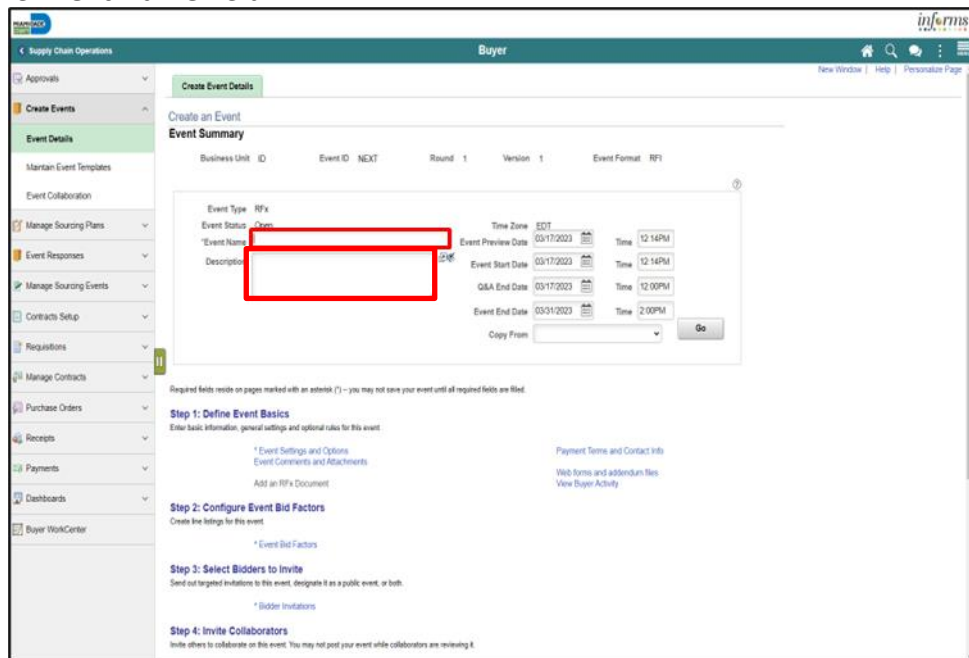
Select **RFI** from the **Event Format** drop down.
Select the **Add** button.



The screenshot shows the 'Create Events' page in the Buyer portal. The 'Event Format' dropdown is set to 'RFI' and is highlighted with a red box. The 'Add' button is also highlighted with a red box.

5.

Enter the desired information into the **Event Name** field.
Enter the desired information into the **Description** field.
Note: The **Description** field is to be used for detailed information that won't otherwise fit in the **Event Name** field.



The screenshot shows the 'Create Event Details' page in the Buyer portal. The 'Event Name' and 'Description' fields are highlighted with red boxes. The page includes a sidebar with navigation options and a main content area with a form for creating a new event. The form includes fields for Event Name, Description, Event Type, Event Status, Event Previews Date, Event Start Date, Q&A End Date, Event End Date, and Time Zone. There are also buttons for 'Copy From' and 'Go'.

Event Preview Date: The date that the event is available to potential bidders, allowing for review of the event, question submissions, and saving of bids, which can be posted as soon as the event starts.

Event Start Date: The date when the bidders/suppliers can begin to post bids for the event.

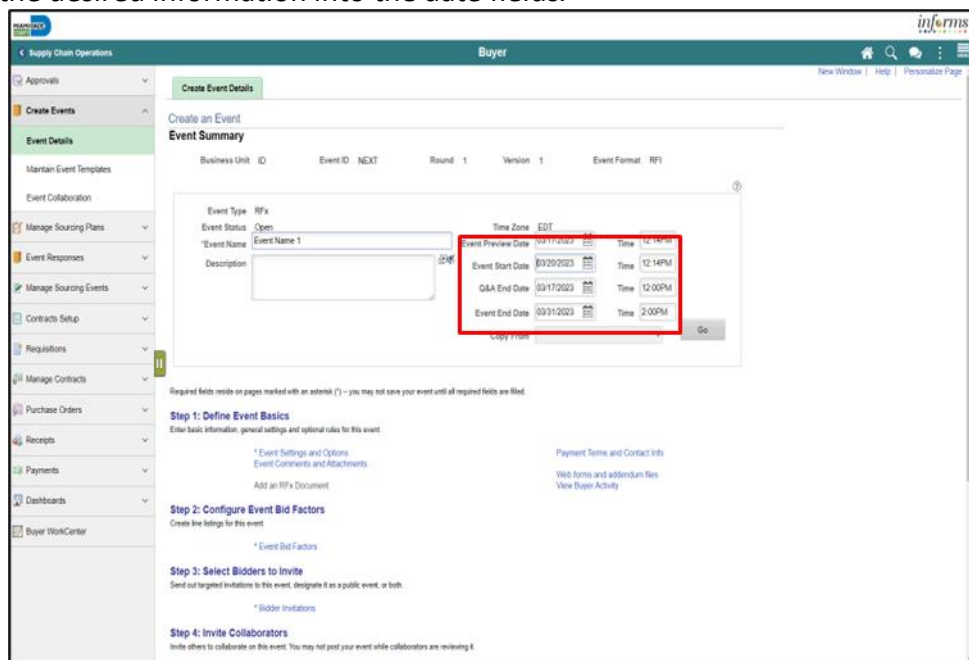
Q&A End Date: The date after which bidders/suppliers can no longer submit questions via the Discussion Forum to the **INFORMS** buyers. Be sure the time is set for 12:00 PM.

Event End Date: The date when the bidding closes. Be sure the time is set for 2:00 PM.

Note: The **Event Preview Date** and the **Event Start Date** should be the same.

Enter the desired information into the date fields.

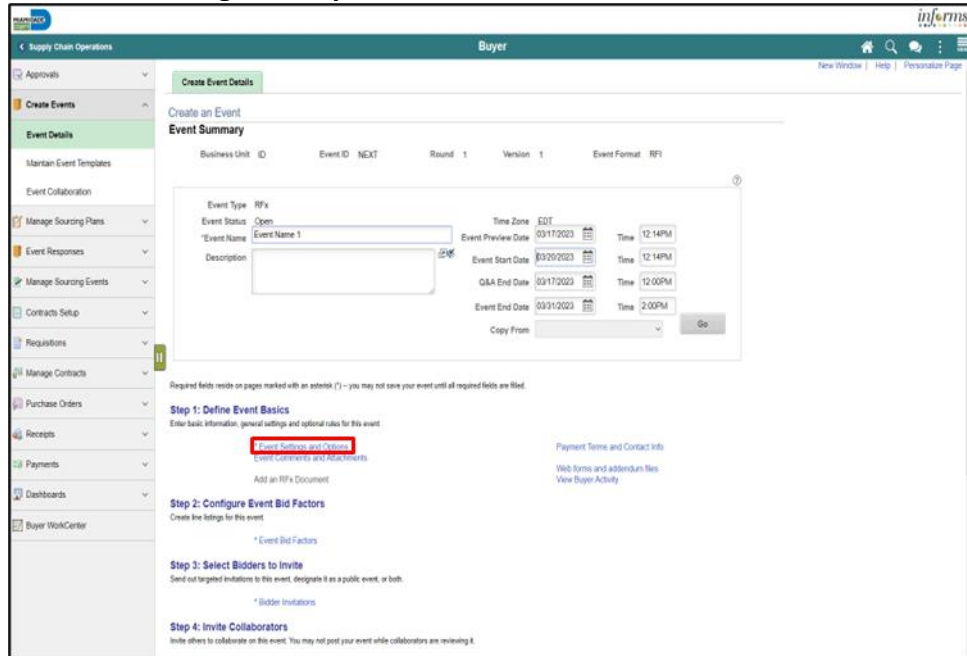
6.



The screenshot shows the 'Create Event Details' page in the INFORMS Buyer portal. The page is titled 'Create an Event' and 'Event Summary'. It includes a sidebar with navigation links such as 'Approvals', 'Create Events', 'Event Details', 'Manage Sourcing Plans', 'Event Responses', 'Manage Sourcing Events', 'Contracts Setup', 'Requisitions', 'Manage Contracts', 'Purchase Orders', 'Receipts', 'Payments', 'Dashboards', and 'Buyer WorkCenter'. The main content area displays the 'Event Details' form. A red box highlights the date and time selection fields for the Event Preview Date, Event Start Date, Q&A End Date, and Event End Date. The Event Preview Date is set to 02/17/2023 at 12:14PM. The Event Start Date is set to 02/20/2023 at 12:14PM. The Q&A End Date is set to 02/17/2023 at 12:00PM. The Event End Date is set to 02/21/2023 at 2:00PM. The page also includes a 'Step 1: Define Event Basics' section with instructions on how to create a new event, and a 'Step 2: Configure Event Bid Factors' section with instructions on how to create bid factors. The 'Step 3: Select Bidders to Invite' section includes instructions on how to send out targeted invitations to the event, and the 'Step 4: Invite Collaborators' section includes instructions on how to invite others to collaborate on the event.

7.

Select the **Event Settings and Options** link.



Buyer

Supply Chain Operations

Create Event Details

Create an Event

Event Summary

Business Unit ID Event ID NEXT Round 1 Version 1 Event Format RFI

Event Type RFI

Event Status Open

Event Name Event Name 1

Description

Time Zone EDT

Event Preview Date 03/17/2023

Event Start Date 03/20/2023

GMA End Date 03/17/2023

Event End Date 03/31/2023

Copy From

Go

Required fields reside on pages marked with an asterisk (*) - you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

Event Settings and Options

Event Comments and Attachments

Add an RFI Document

Payment Terms and Contact Info

Web forms and addendum files

View Buyer Activity

Step 2: Configure Event Bid Factors

Create line settings for this event.

* Event Bid Factors

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

* Bidder Invitations

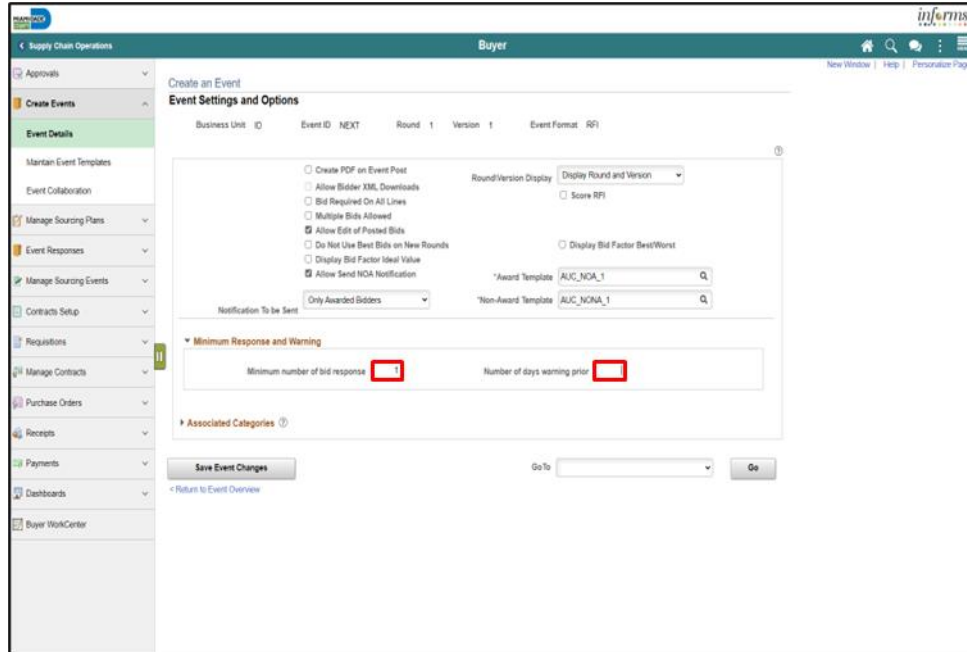
Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

8.

Enter the desired information into the **Minimum number of bid response** field and **Number of days warning prior** field.

Note: Do not edit the selections in the section above.



Buyer

Supply Chain Operations

Create an Event

Event Settings and Options

Business Unit ID Event ID NEXT Round 1 Version 1 Event Format RFI

Create PDF on Event Post

Allow Bidder XML Downloads

Bid Required On All Lines

Multiple Bids Allowed

Allow Edit of Posted Bids

Do Not Use Best Bids on New Rounds

Display Bid Factor Ideal Value

Allow Send NOA Notification

Round/Version Display

Display Round and Version

Score RFI

Display Bid Factor Best/Worst

*Award Template AUC_NOA_1

*Non-Award Template AUC_NOA_1

Notification To be Sent

Only Awarded Bidders

Minimum Response and Warning

Minimum number of bid response 1

Number of days warning prior 1

Associated Categories

Save Event Changes

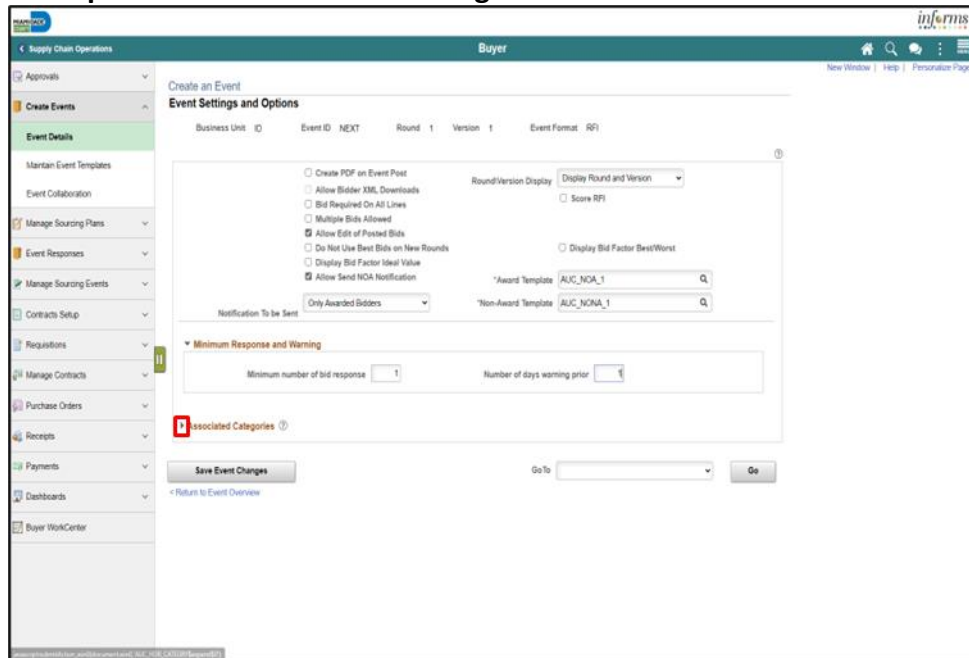
Go To

Go

< Return to Event Overview

Select the **Expand section Associated Categories** button.

9.

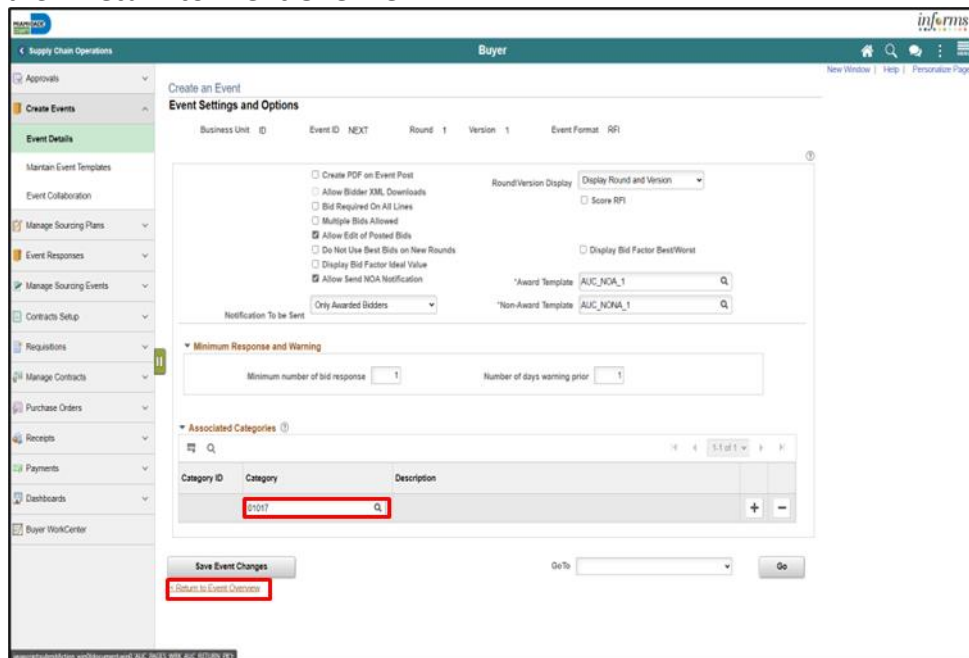


The screenshot shows the 'Create an Event' page in the Buyer section. The 'Associated Categories' section is collapsed. The page includes a sidebar with navigation links, a top navigation bar, and a main content area with various settings and options.

Category Code: The category code associated with the event. Bidders/Suppliers will be searched based on the associated categorization.

Enter or search for the desired information in the **Category** field.
Select the **< Return to Event Overview** link.

10.

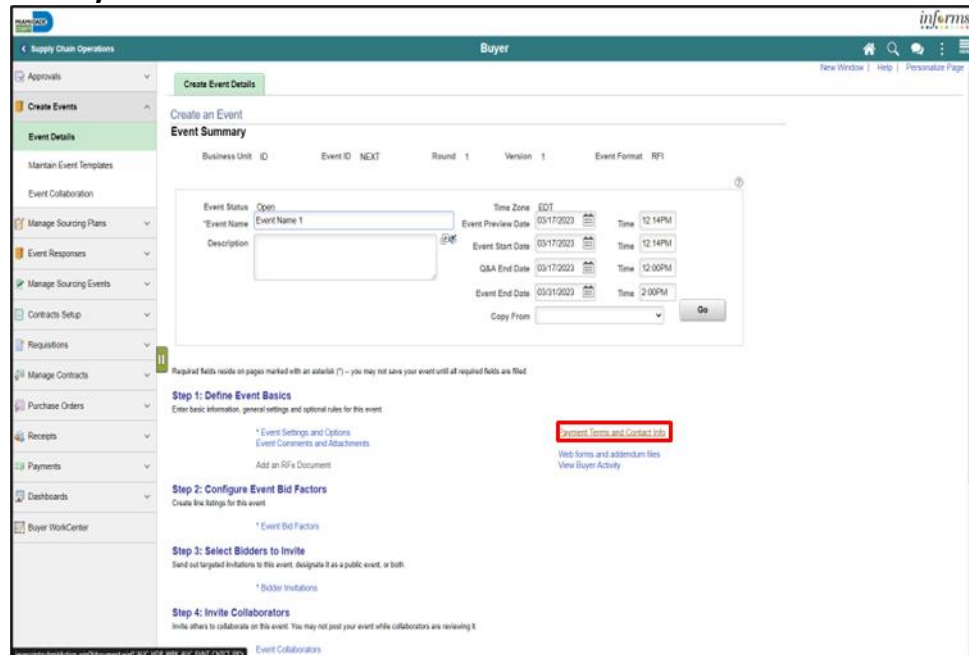


The screenshot shows the 'Create an Event' page in the Buyer section. The 'Associated Categories' section is expanded, showing a table with columns for Category ID, Category, and Description. The 'Category' field is highlighted with a red box. The 'Return to Event Overview' link is also highlighted with a red box.

Category ID	Category	Description
11017		

11.

Select the **Payment Terms and Contact Info** link.



The screenshot shows the 'Event Summary' page in the INFORMS Buyer interface. The left sidebar contains a navigation menu with options like Approvals, Create Events, Event Details, and others. The main content area displays the 'Event Summary' for a specific event. A red box highlights the 'Payment Terms and Contact Info' link in the right-hand section of the page. Below this link, there are sections for 'Step 1: Define Event Basics', 'Step 2: Configure Event Bid Factors', 'Step 3: Select Bidders to Invite', and 'Step 4: Invite Collaborators'.

12.

Enter or correct **Event Contact** details.

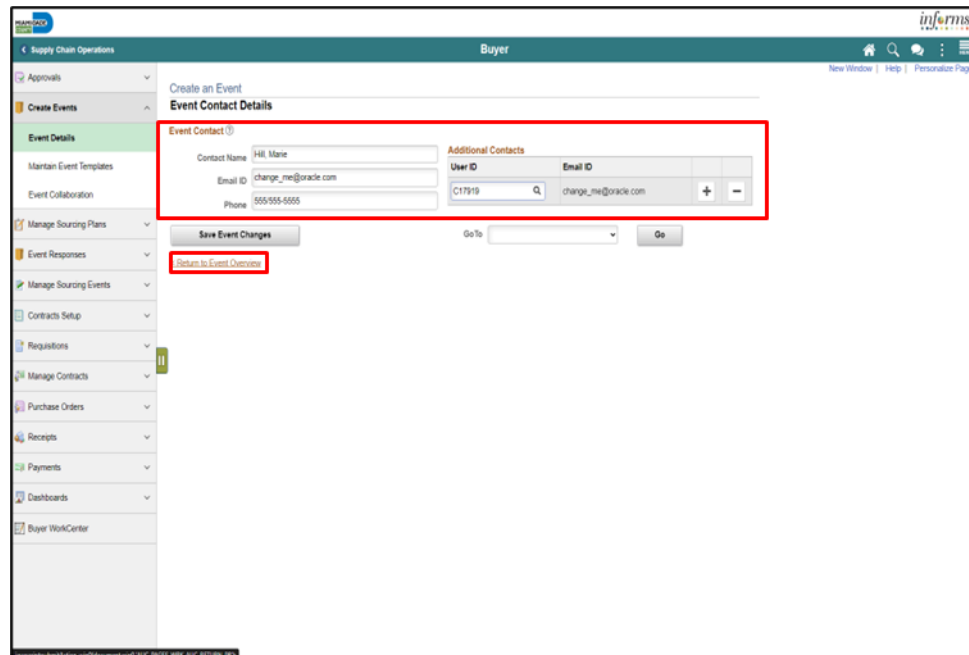
- **Contact Name**
- **Email ID**
- **Phone**

Enter or search for **Additional Contacts**.

- **User ID** to be notified of **Event Q&A Forum** questions.

Note: If any questions are asked by bidders, Clerk of the Board will be notified.

Select the **< Return to Event Overview** link.



The screenshot shows the 'Event Contact Details' page in the INFORMS Buyer interface. The left sidebar is the same as in the previous screenshot. The main content area displays the 'Event Contact Details' for a specific event. A red box highlights the 'Event Contact' section, which includes fields for 'Contact Name', 'Email ID', and 'Phone'. Another red box highlights the 'Additional Contacts' section, which includes a table with columns for 'User ID' and 'Email ID'. Below the table, there are buttons for 'Save Event Changes' and 'Return to Event Overview'.

The next Section is "**Event Comments and Attachments**".

The buyer should enter any specific comments for the event.

Send to Bidder field: Select to enable the bidder to see the comment.

Include on Award field: Select to enable the comments to appear on the contract or purchase order award.

Adding Attachments:

Attached File: Select the file to attach to this event.

Attachment Description: Enter a description (name) for the attachment.

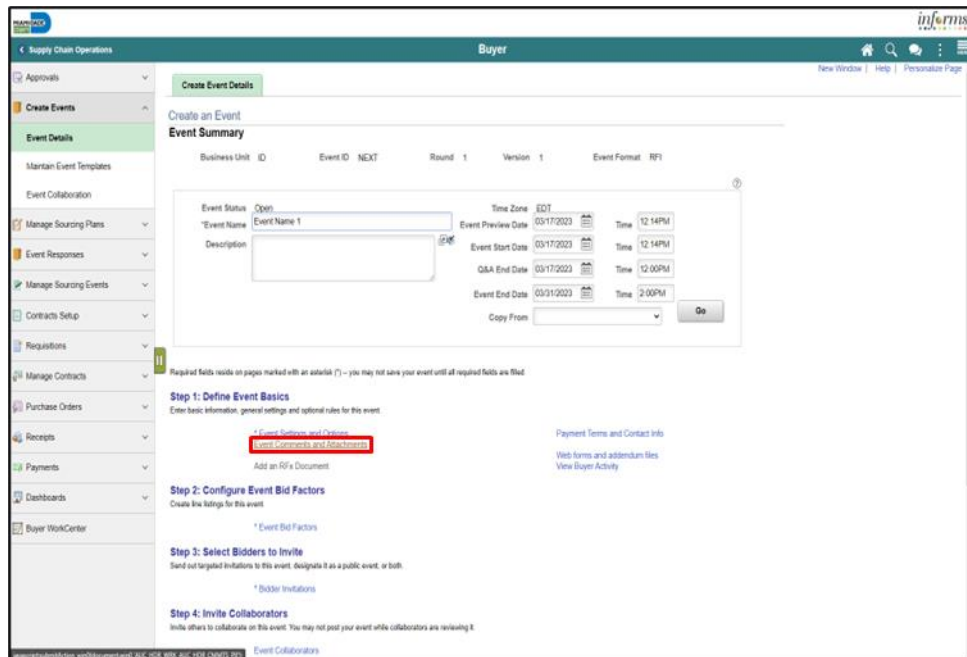
Display to Bidder: Select this check box if you want this attachment to be available to bidders.

Include on Award: Select this check box if you want to include this attachment with the award.

Note: The Bid Packet Merge Pdf file will be in the order listed on the Events Comments and Attachments page.

13.

Select the **Events Comments and Attachments** link.



The screenshot shows the 'Create Event Details' page in the Informatics Buyer portal. The left sidebar contains a navigation menu with options like Approvals, Create Events, Event Details, and various management tools. The main content area is titled 'Event Summary' and includes fields for Event Status, Event Name, Description, Time Zone, Event Preview Date, Event Start Date, Q&A End Date, and Event End Date. Below these fields, there are four steps: Step 1: Define Event Basics, Step 2: Configure Event Bid Factors, Step 3: Select Bidders to Invite, and Step 4: Invite Collaborators. The 'Event Comments and Attachments' link is highlighted in the Step 1 section.

14.

Enter the desired information into the **Comments** field.

Note: Select the **Send To Bidder** checkbox if the comments are intended for the bidder.

The screenshot shows the Informa Buyer application interface. On the left is a navigation menu with options like 'Supply Chain Operations', 'Approvals', 'Create Events', 'Event Details', 'Manage Event Templates', 'Event Collaboration', 'Manage Sourcing Plans', 'Event Responses', 'Manage Sourcing Events', 'Contracts Setup', 'Requests', 'Manage Contracts', 'Purchase Orders', 'Receipts', 'Payments', 'Dashboards', and 'Buyer WorkCenter'. The main header area displays 'Buyer' and 'Create an Event'. Below this, the 'Event Comments and Attachments' section is active, showing 'Event ID: NEXT'. A red rectangle highlights the 'Comments' text area, which is currently empty. Below the text area are buttons for 'Add Attachment', 'OK', 'Cancel', and 'Refresh'. At the bottom of the page, there is a footer with '© 2013 Informa PLC' and other legal notices.

15.

Select the **Add Attachment** button.

Select the **Choose File** button.

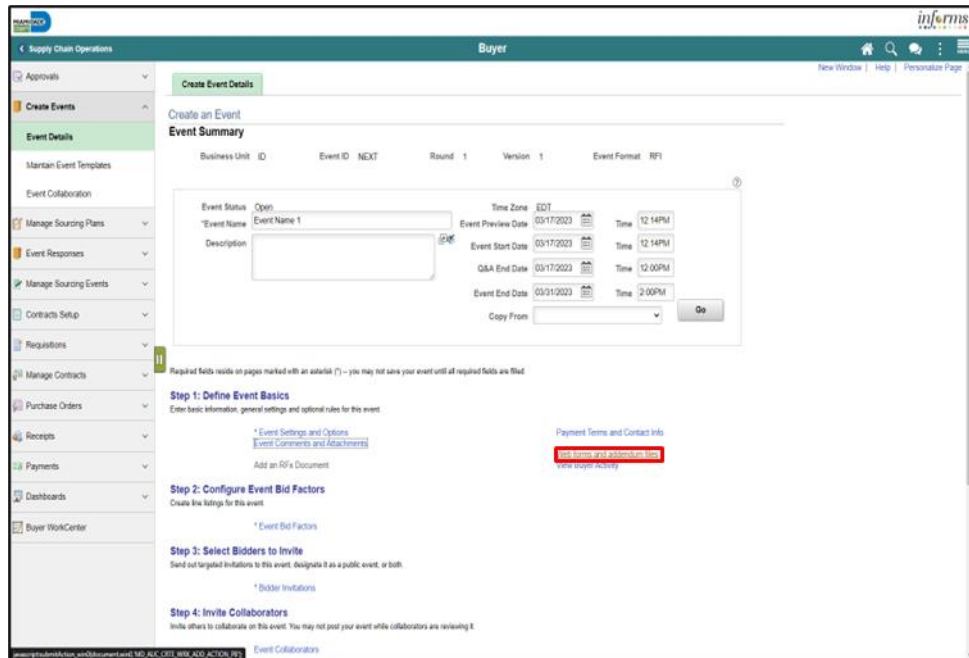
Select the desired file. **Note:** The file name has a 30 Character Limit.

Select the **Open** button.

Select the **Upload** button.

The screenshot displays the 'Buyer' interface for managing an event. On the left, a sidebar lists various navigation options, with 'Event Details' currently selected. The main content area is titled 'Event Comments and Attachments' and includes a 'Comments' text area and an 'Add Attachment' button, which is highlighted with a red rectangle. Below the main content, a modal window titled 'Select File to create an Attachment' is open, showing a file path 'C:\ANIRISAT_3.10.mn' and an 'Upload' button, also highlighted with a red rectangle.

17.

Select the **Web forms and addendum files** link.


Event Summary

Business Unit ID: Event ID: NEXT Round: 1 Version: 1 Event Format: RFI

Event Status: Open Event Name: Event Name 1 Description: [Text Box]

Time Zone: EST Event Preview Date: 03/17/2023 Time: 12:14PM

Event Start Date: 03/17/2023 Time: 12:14PM

Q&A End Date: 03/17/2023 Time: 12:00PM

Event End Date: 03/31/2023 Time: 2:00PM

Copy From: [Dropdown] [Go]

Required fields visible on pages marked with an asterisk (*) - you may not save your event until all required fields are filled

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

* Event Settings and Options
* Event Comments and Attachments
Add an RFI's Document

Step 2: Configure Event Bid Factors
Create bid factors for this event.

* Event Bid Factors

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

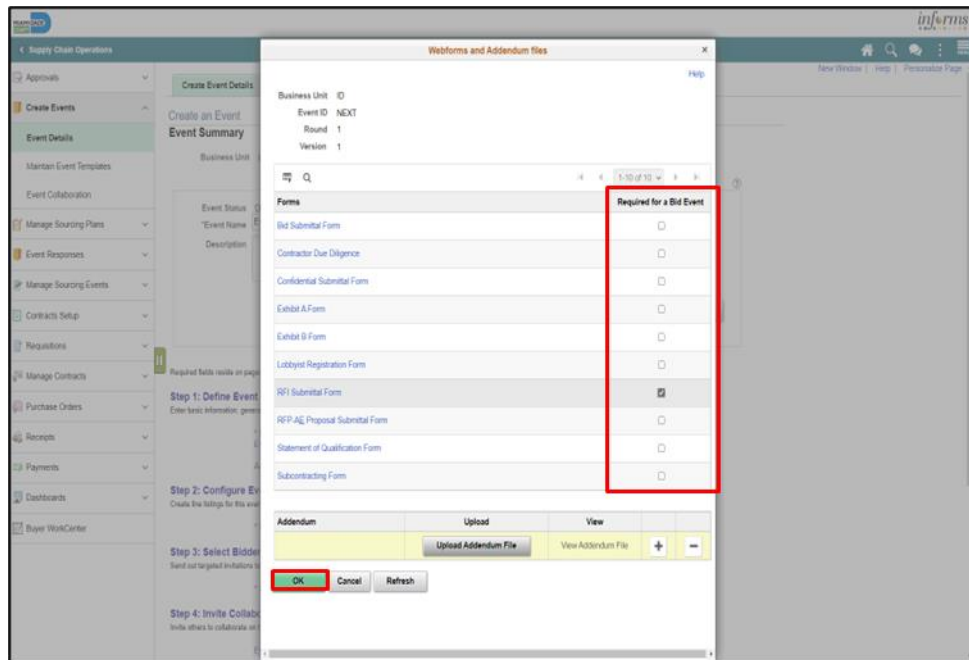
* Bidder Invitations

Step 4: Invite Collaborators
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

* Event Collaborators

Web forms and addendum files

18.

Select the appropriate form(s) by checking the **Required for a Bid Event** box.
Select the **OK** button.


Webforms and Addendum Files

Business Unit ID: Event ID: NEXT Round: 1 Version: 1

Forms

Form	Required for a Bid Event
Bid Submittal Form	<input type="checkbox"/>
Contractor Due Diligence	<input type="checkbox"/>
Confidential Submittal Form	<input type="checkbox"/>
Exhibit A Form	<input type="checkbox"/>
Exhibit B Form	<input type="checkbox"/>
Lobbyist Registration Form	<input type="checkbox"/>
RFI Submittal Form	<input checked="" type="checkbox"/>
RFP/AE Proposal Submittal Form	<input type="checkbox"/>
Statement of Qualification Form	<input type="checkbox"/>
Subcontracting Form	<input type="checkbox"/>

Addendum

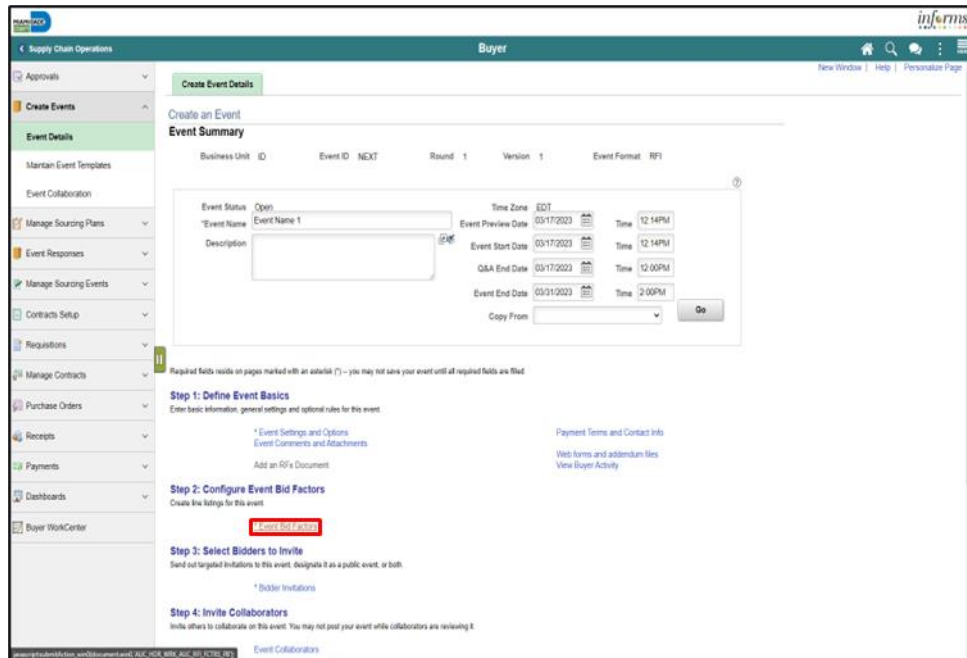
Upload

View

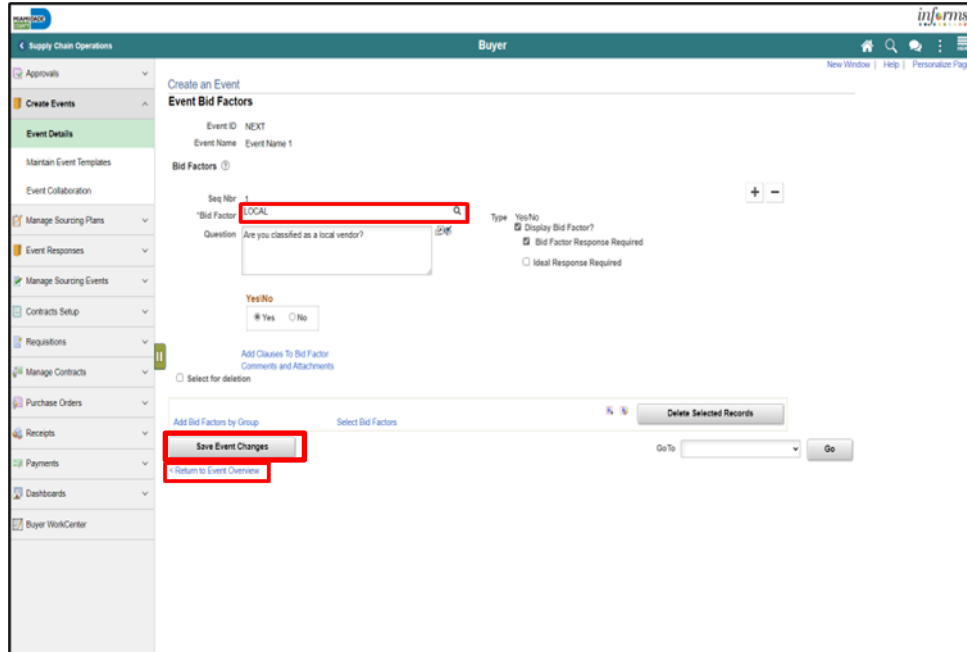
Upload Addendum File View Addendum File + -

OK Cancel Refresh

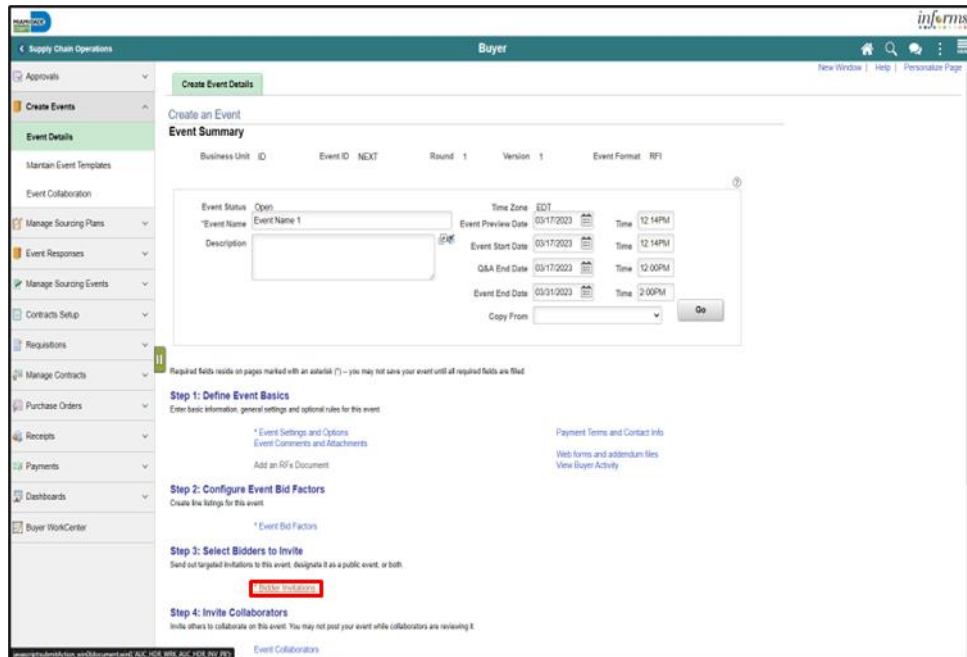
19.

Select the **Event Bid Factors** link.


20.

Enter or search for the **Bid Factor**.Select the **Save Event Changes** button.Select the **< Return to Event Overview** link.


21.

Select the **Bidder Invitations** link.


Event Summary

Business Unit: ID: Event ID: NEXT: Round: 1 Version: 1 Event Format: RFI

Event Status: Open
Event Name: Event Name 1
Description: [Text Box]

Time Zone: EDT
Event Preview Date: 03/17/2023 Time: 12:14PM
Event Start Date: 03/17/2023 Time: 12:14PM
Q&A End Date: 03/17/2023 Time: 12:00PM
Event End Date: 03/31/2023 Time: 2:00PM
Copy From: [Dropdown] Go

Required fields visible on pages marked with an asterisk (*) - you may not save your event until all required fields are filled

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.
* Event Settings and Options
Event Comments and Attachments
Add an RFI's Document
Payment Terms and Contact Info
Web forms and addendum files
View Buyer Activity

Step 2: Configure Event Bid Factors
Create bid factors for this event.
* Event Bid Factors

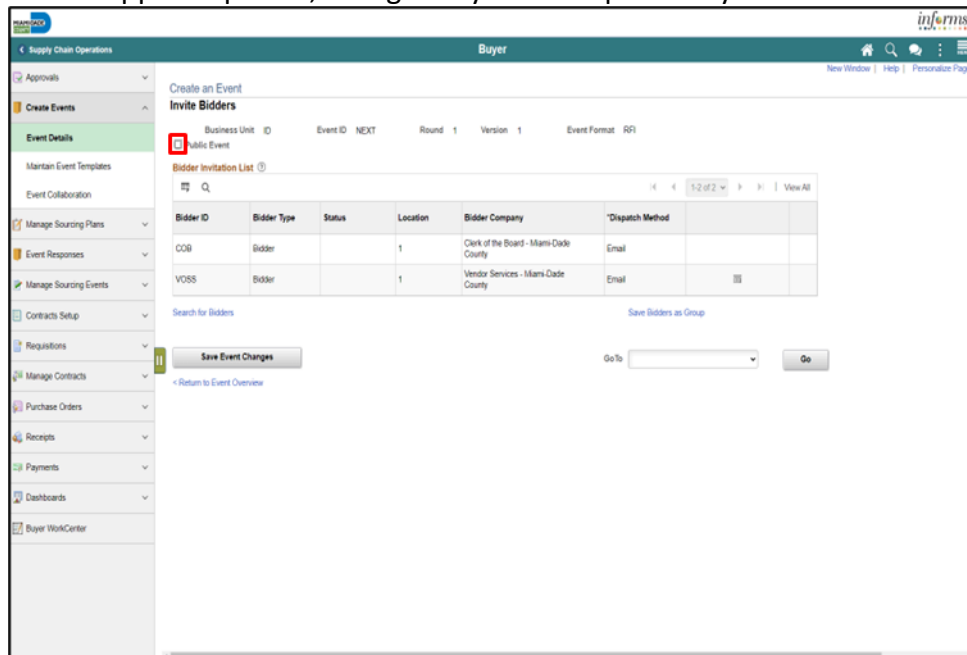
Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.
Bidder Invitations

Step 4: Invite Collaborators
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.
Event Collaborators

22.

Select the **Public Event** option.

Note: When an event is public, all Bidders and Suppliers that are in the system will be notified automatically if the categories of the event match the categories from the Bidder's and Supplier's profile, though they are not specifically invited.



Invite Bidders

☒ Public Event

Bidder Invitation List

Bidder ID	Bidder Type	Status	Location	Bidder Company	Dispatch Method
COB	Bidder		1	Clerk of the Board - Miami Dade County	Email
VOSS	Bidder		1	Vendor Services - Miami Dade County	Email

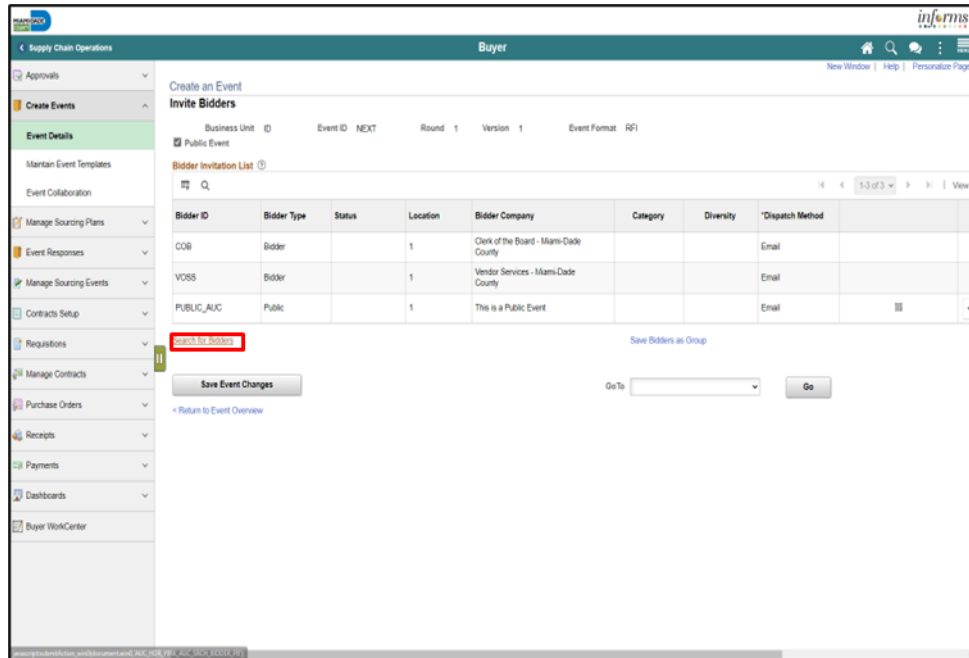
Search for Bidders Save Bidders as Group

Save Event Changes Go To [Dropdown] Go

Return to Event Overview

23.

Note: Clerk of the Board and Vendor Services will be notified when the event is posted. Select the **Search for Bidders** link.

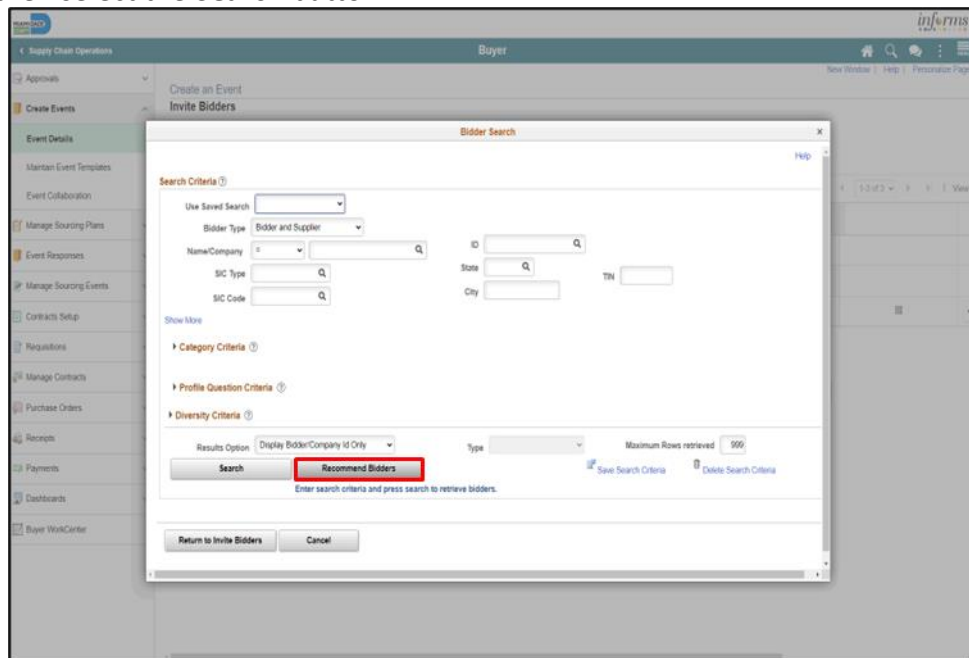


Bidder ID	Bidder Type	Status	Location	Bidder Company	Category	Diversity	Dispatch Method
COB	Bidder		1	Clerk of the Board - Miami-Dade County			Email
VOSS	Bidder		1	Vendor Services - Miami-Dade County			Email
PUBLIC_AUC	Public		1	This is a Public Event			Email

24.

Select the **Recommend Bidders** button, if applicable.

Note: Bidders should be recommended only if the event is Public. If sourcing from a bidder group, select the **Show More** link and enter the **Contract ID** in the **Group Name** field, then select the **Search** button.



Search Criteria

Use Saved Search: [Dropdown]

Bidder Type: [Dropdown]

Name/Company: [Text Field]

SIC Type: [Text Field]

SIC Code: [Text Field]

ID: [Text Field]

State: [Text Field]

City: [Text Field]

TIN: [Text Field]

Show More

Category Criteria

Profile Question Criteria

Diversity Criteria

Results Option: [Dropdown]

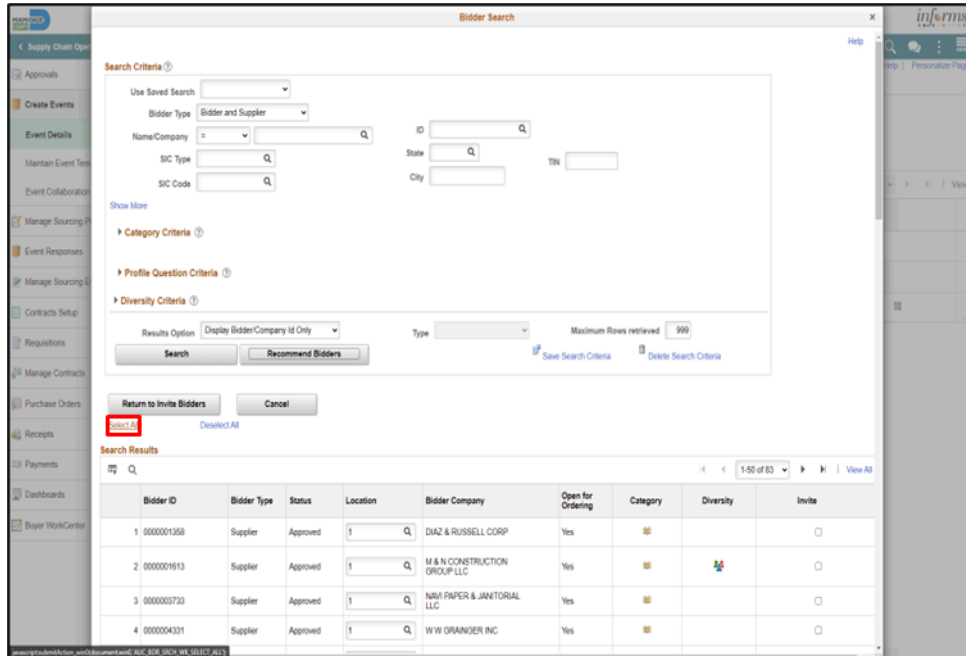
Type: [Dropdown]

Maximum Rows retrieved: 999

Search [Button] Recommend Bidders [Button]

Return to Invite Bidders [Button] Cancel [Button]

25.

Select the **Select All** link.


Bidder Search

Search Criteria ⓘ

Use Saved Search:

Bidder Type:

Name/Company:

SIC Type:

SIC Code:

ID:

State:

City:

TIN:

Show More

Category Criteria ⓘ

Profile Question Criteria ⓘ

Diversity Criteria ⓘ

Results Option: Display Bidder/Company Id Only

Type:

Maximum Rows retrieved: 999

Search

Recommend Bidders

Save Search Criteria

Delete Search Criteria

Return to Invite Bidders

Cancel

Select All

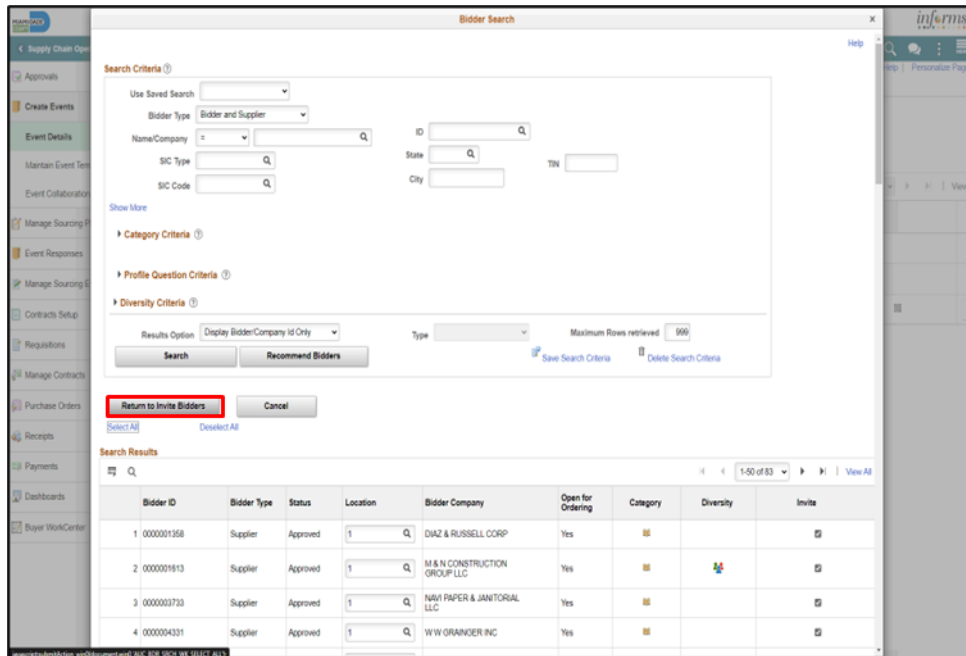
Deselect All

Search Results

1-50 of 83

Bidder ID	Bidder Type	Status	Location	Bidder Company	Open for Ordering	Category	Diversity	Invite
1 000001358	Supplier	Approved	1	DIAZ & RUSSELL CORP	Yes			<input type="checkbox"/>
2 000001613	Supplier	Approved	1	M & N CONSTRUCTION GROUP LLC	Yes			<input type="checkbox"/>
3 000003723	Supplier	Approved	1	NAV PAPER & JANITORIAL LLC	Yes			<input type="checkbox"/>
4 000004331	Supplier	Approved	1	WW GRANGER INC	Yes			<input type="checkbox"/>

26.

Select the **Return to Invite Bidders** button.


Bidder Search

Search Criteria ⓘ

Use Saved Search:

Bidder Type:

Name/Company:

SIC Type:

SIC Code:

ID:

State:

City:

TIN:

Show More

Category Criteria ⓘ

Profile Question Criteria ⓘ

Diversity Criteria ⓘ

Results Option: Display Bidder/Company Id Only

Type:

Maximum Rows retrieved: 999

Search

Recommend Bidders

Save Search Criteria

Delete Search Criteria

Return to Invite Bidders

Cancel

Select All

Deselect All

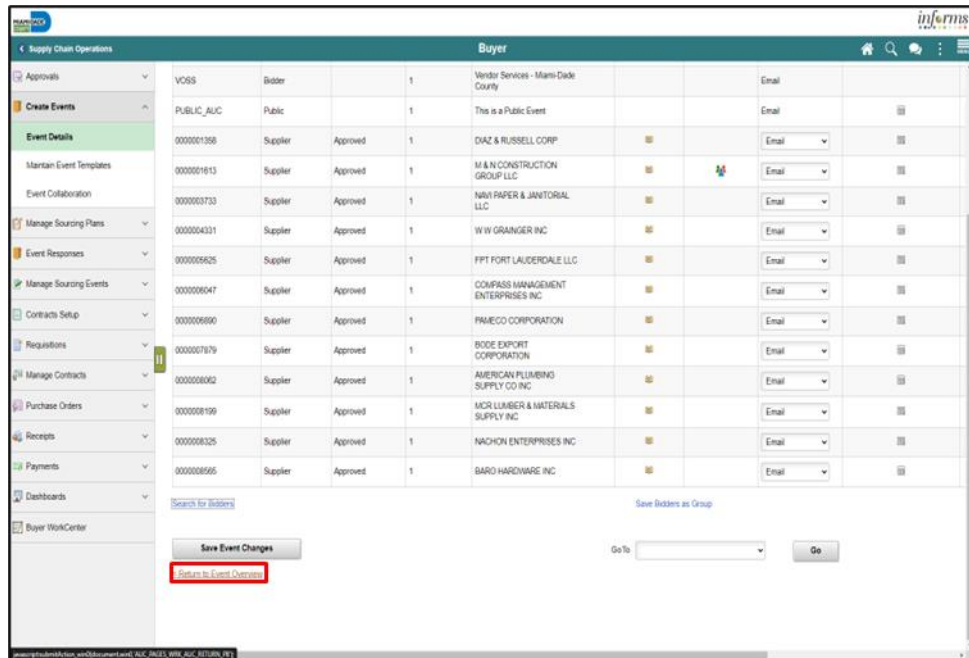
Search Results

1-50 of 83

Bidder ID	Bidder Type	Status	Location	Bidder Company	Open for Ordering	Category	Diversity	Invite
1 000001358	Supplier	Approved	1	DIAZ & RUSSELL CORP	Yes			<input type="checkbox"/>
2 000001613	Supplier	Approved	1	M & N CONSTRUCTION GROUP LLC	Yes			<input type="checkbox"/>
3 000003723	Supplier	Approved	1	NAV PAPER & JANITORIAL LLC	Yes			<input type="checkbox"/>
4 000004331	Supplier	Approved	1	WW GRANGER INC	Yes			<input type="checkbox"/>

27.

Select the < Return to Event Overview link.

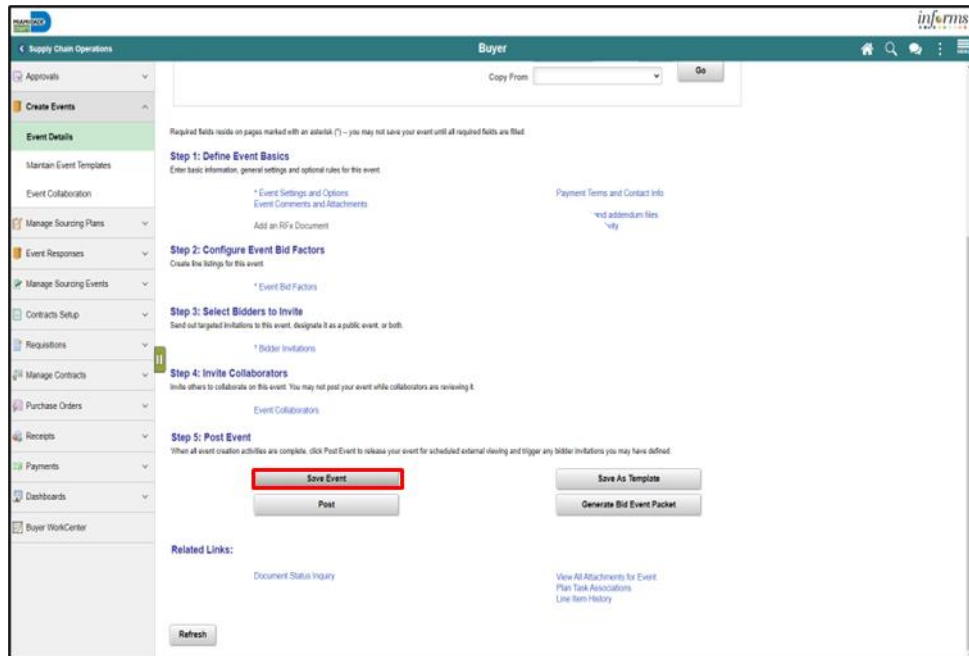


The screenshot shows the INFORMS Buyer interface. On the left is a navigation menu with options like Approvals, Create Events, Event Details, Manage Sourcing Plans, Event Responses, Manage Sourcing Events, Contracts Setup, Requisitions, Manage Contracts, Purchase Orders, Receipts, Payments, Dashboards, and Buyer WorkCenter. The main area displays a table of events. The 'Return to Event Overview' link is highlighted in red at the bottom of the table.

Event ID	Event Name	Supplier	Status	Buyer	Actions
000001358	PUBLIC_AUC	Supplier	Approved	1	Email Return to Event Overview
000001613	Public	Supplier	Approved	1	Email Return to Event Overview
000003733	Public	Supplier	Approved	1	Email Return to Event Overview
000004331	Public	Supplier	Approved	1	Email Return to Event Overview
000005625	Public	Supplier	Approved	1	Email Return to Event Overview
000006047	Public	Supplier	Approved	1	Email Return to Event Overview
000006690	Public	Supplier	Approved	1	Email Return to Event Overview
000007679	Public	Supplier	Approved	1	Email Return to Event Overview
000008062	Public	Supplier	Approved	1	Email Return to Event Overview
000008199	Public	Supplier	Approved	1	Email Return to Event Overview
000008325	Public	Supplier	Approved	1	Email Return to Event Overview
000008565	Public	Supplier	Approved	1	Email Return to Event Overview

28.

Select the Save Event button.



The screenshot shows the INFORMS Buyer interface for creating a new event. The 'Save Event' button is highlighted in red. The interface includes a navigation menu on the left and a main area with steps for creating an event.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

Step 2: Configure Event Bid Factors
Create the settings for this event.

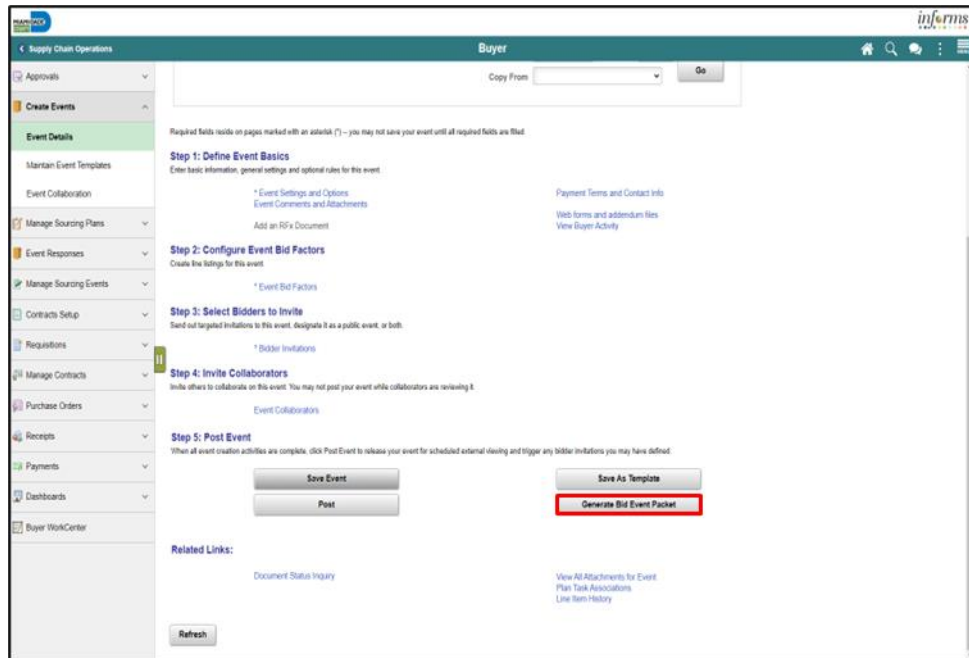
Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

Step 4: Invite Collaborators
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

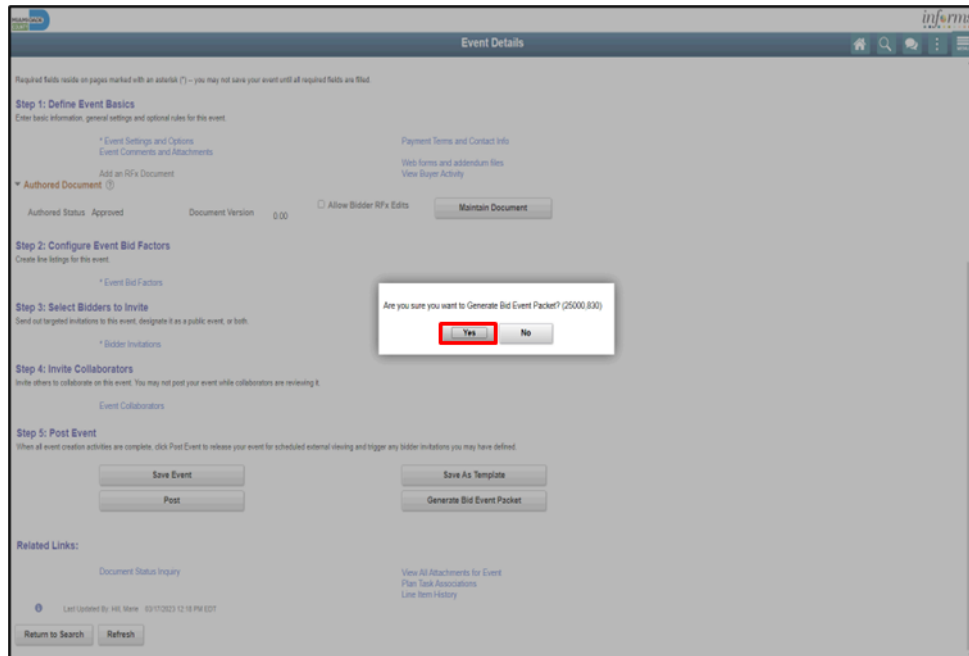
Buttons: Save Event, Post, Save As Template, Generate Bid Event Packet.

29.

Select the **Generate Bid Event Packet** button.

The screenshot shows the 'Buyer' interface in the INFORMS system. The left sidebar contains a navigation menu with options like Approvals, Create Events, Event Details, Manage Sourcing Plans, Event Responses, Manage Sourcing Events, Contracts Setup, Requisitions, Manage Contracts, Purchase Orders, Receipts, Payments, Dashboards, and Buyer WorkCenter. The main content area displays a series of steps for creating an event: Step 1: Define Event Basics, Step 2: Configure Event Bid Factors, Step 3: Select Bidders to Invite, Step 4: Invite Collaborators, and Step 5: Post Event. At the bottom of the steps, there are buttons for 'Save Event', 'Post', 'Save As Template', and 'Generate Bid Event Packet'. The 'Generate Bid Event Packet' button is highlighted with a red rectangular box.

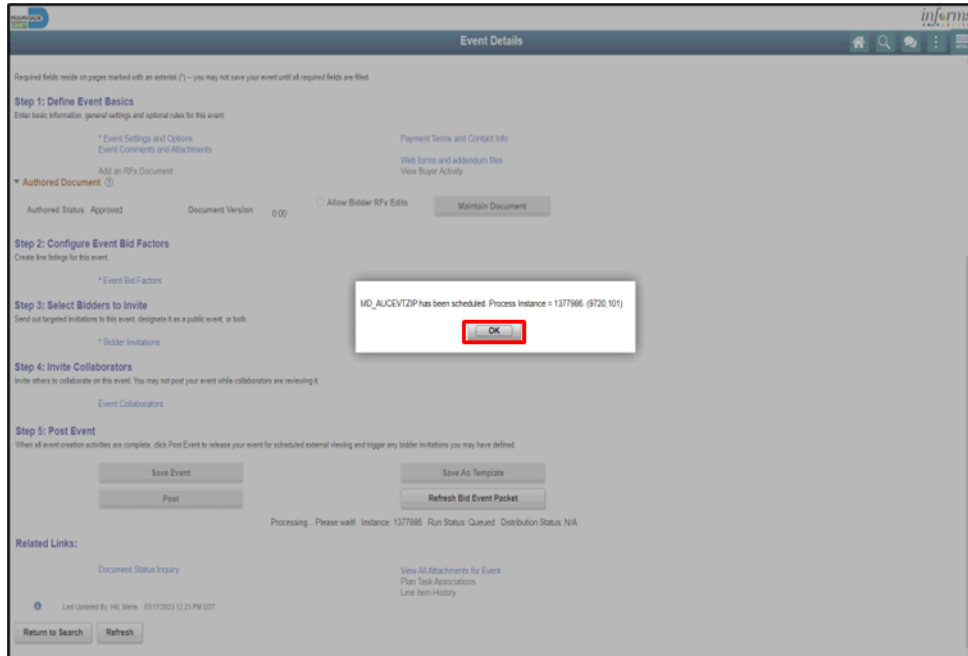
30.

Select the **Yes** button.

The screenshot shows the 'Event Details' interface. A modal dialog box is displayed in the center, asking 'Are you sure you want to Generate Bid Event Packet? (25000,000)'. The dialog has two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red rectangular box. The background interface shows the same steps as in the previous screenshot, but they are dimmed.

Select the **OK** button.

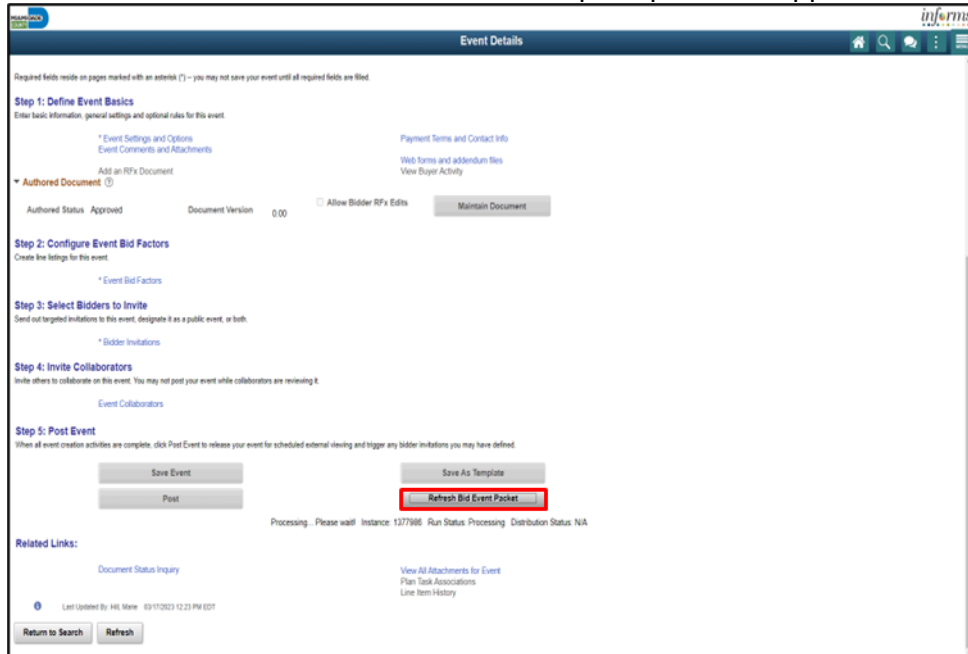
31.



The screenshot shows the 'Event Details' page in the INFORMS system. A modal dialog box is displayed in the center, containing the text: 'MO_AUCEVTZIP has been scheduled. Process Instance = 1377986 (9720, 101)'. Below the text is an 'OK' button, which is highlighted with a red rectangular box. The background page shows various steps for event creation, including 'Step 1: Define Event Basics', 'Step 2: Configure Event Bid Factors', 'Step 3: Select Bidders to Invite', 'Step 4: Invite Collaborators', and 'Step 5: Post Event'. At the bottom, there are buttons for 'Return to Search' and 'Refresh'.

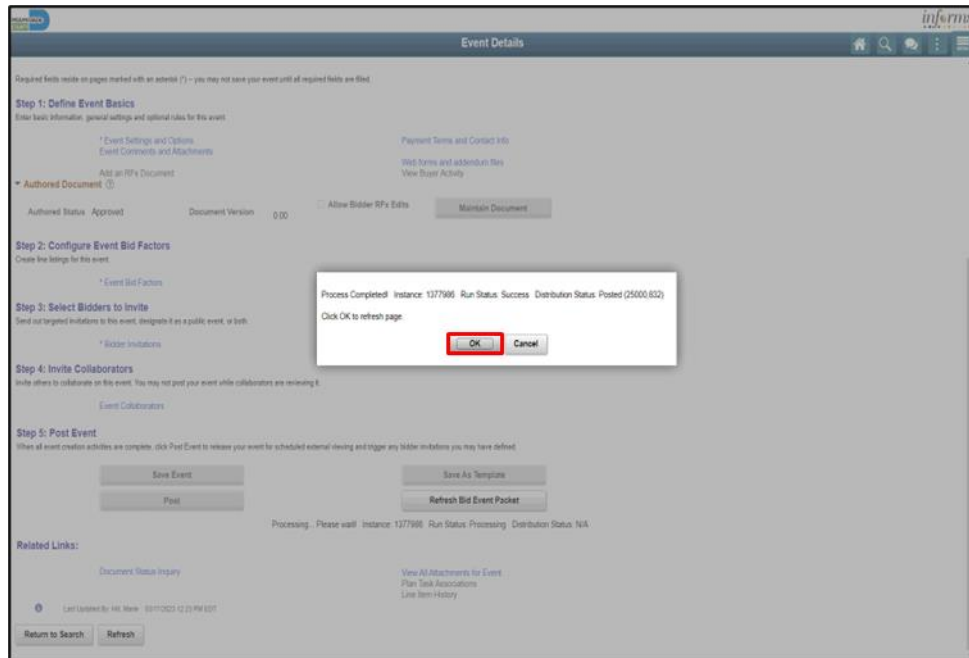
Select the **Refresh Bid Event Packet** button until a prompt screen appears.

32.



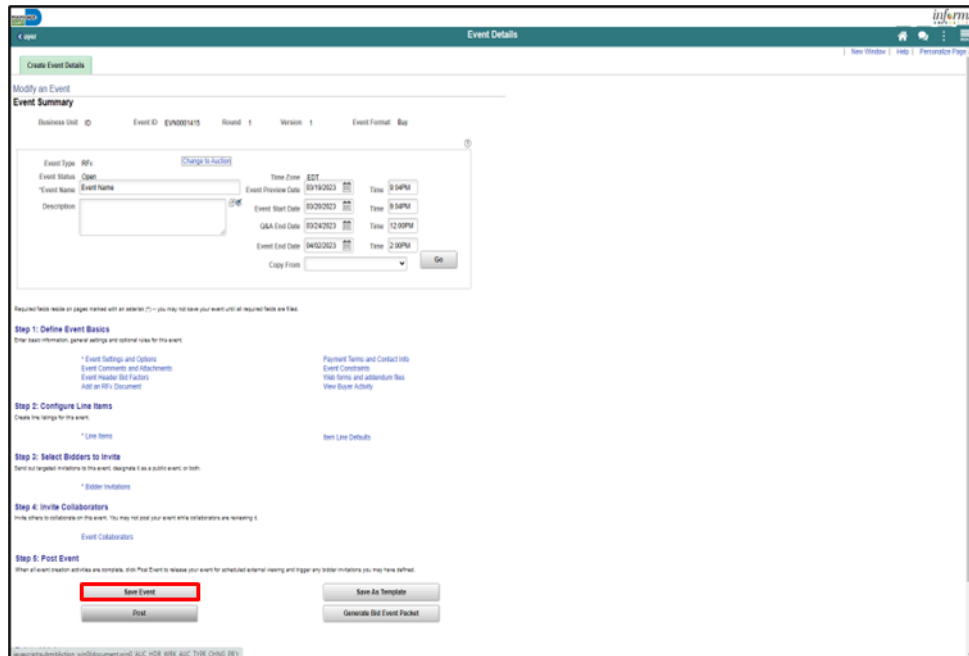
The screenshot shows the 'Event Details' page in the INFORMS system. The 'Refresh Bid Event Packet' button is highlighted with a red rectangular box. The page displays the same steps as in the previous screenshot, including 'Step 1: Define Event Basics', 'Step 2: Configure Event Bid Factors', 'Step 3: Select Bidders to Invite', 'Step 4: Invite Collaborators', and 'Step 5: Post Event'. The 'Post' button is also visible. At the bottom, there are buttons for 'Return to Search' and 'Refresh'.

33.

Select the **OK** button.


The screenshot shows the 'Event Details' page in the INFORMS system. A modal dialog box is displayed in the center with the text: 'Process Completed Instance: 1377986 Run Status: Success Distribution Status: Posted (25000/832)'. Below the text, it says 'Click OK to refresh page:'. The 'OK' button is highlighted with a red rectangle. Other buttons visible include 'Cancel', 'Save Event', 'Save As Template', 'Post', and 'Refresh Bid Event Packet'.

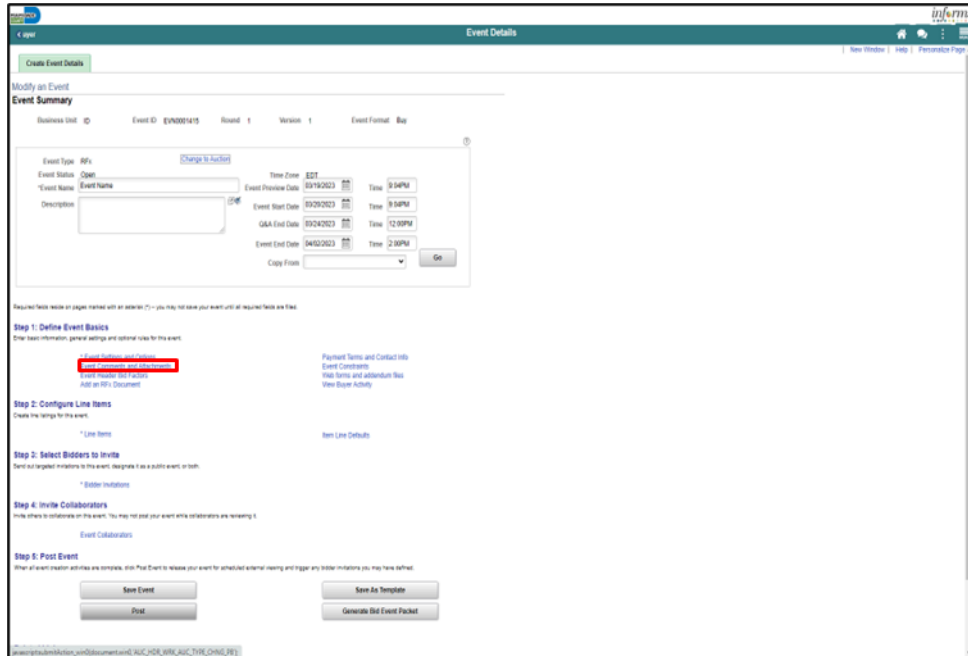
34.

Select the **Save Event** button.


The screenshot shows the 'Event Details' page in the INFORMS system. The 'Event Summary' section is visible, showing fields for Event ID, Round, Version, and Event Format. Below this, there are sections for 'Step 1: Define Event Basics', 'Step 2: Configure Line Items', 'Step 3: Select Bidders to Invite', 'Step 4: Invite Collaborators', and 'Step 5: Post Event'. The 'Save Event' button is highlighted with a red rectangle. Other buttons visible include 'Post', 'Save As Template', and 'Generate Bid Event Packet'.

Select the **Event Comments and Attachments** link.

35.



Event Details

Modify an Event

Event Summary

Business Unit: ID Event ID: EVN001415 Round: 1 Version: 1 Event Format: Bid

Event Type: RFI [Change to Auction](#)

Event Status: Open

Event Name:

Description:

Time Zone: EDT

Event Preview Date: 03/19/2023 Time: 10:00PM

Event Start Date: 03/20/2023 Time: 09:00PM

QA End Date: 03/24/2023 Time: 12:00PM

Event End Date: 04/02/2023 Time: 2:00PM

Copy From:

[Go](#)

Please read these notes on pages marked with an asterisk (*) - you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[Event Actions and Options](#)

[Payment Terms and Contract Info](#)

[Event Constraints](#)

[Step 2: Configure Line Items](#)

[Step 3: Select Bidders to Invite](#)

[Step 4: Invite Collaborators](#)

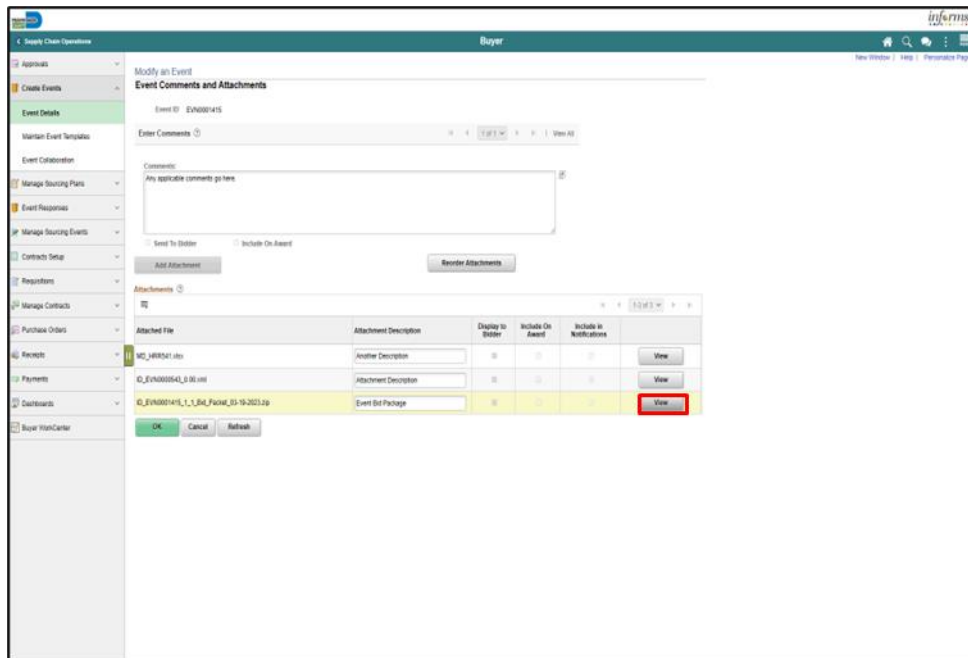
[Step 5: Post Event](#)

[Save Event](#) [Save As Template](#)

[Post](#) [Generate Bid Event Packet](#)

View the **Event Bid Package** to ensure all documents were loaded into the .pdf file.
Select the **View** button.

36.



Buyer

Modify an Event

Event Comments and Attachments

Event ID: EVN001415

Enter Comments

Comments:

Any applicable comments go here

[Send To Bidder](#) [Include On Award](#)

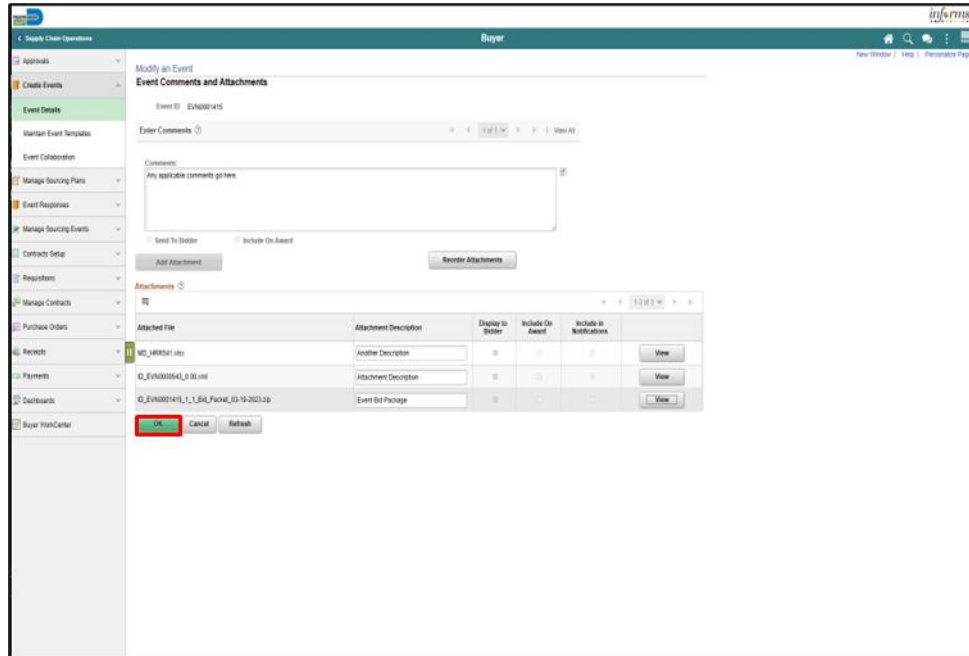
[Add Attachment](#) [Reorder Attachments](#)

Attachments

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	View
MD_1480241.xls	Another Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
KL_EVN000043_036.xls	Attachment Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
KL_EVN001415_1_1_Bid_Package_03-19-2023.zip	Event Bid Package	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View

[OK](#) [Cancel](#) [Refresh](#)

37.

Select the **OK** button.


Buyer

Event ID: EVN001415

Event Comments and Attachments

Enter Comments

Comments

Any applicable comments go here

Send To Bidder ☐ Include On Award ☐

Add Attachment

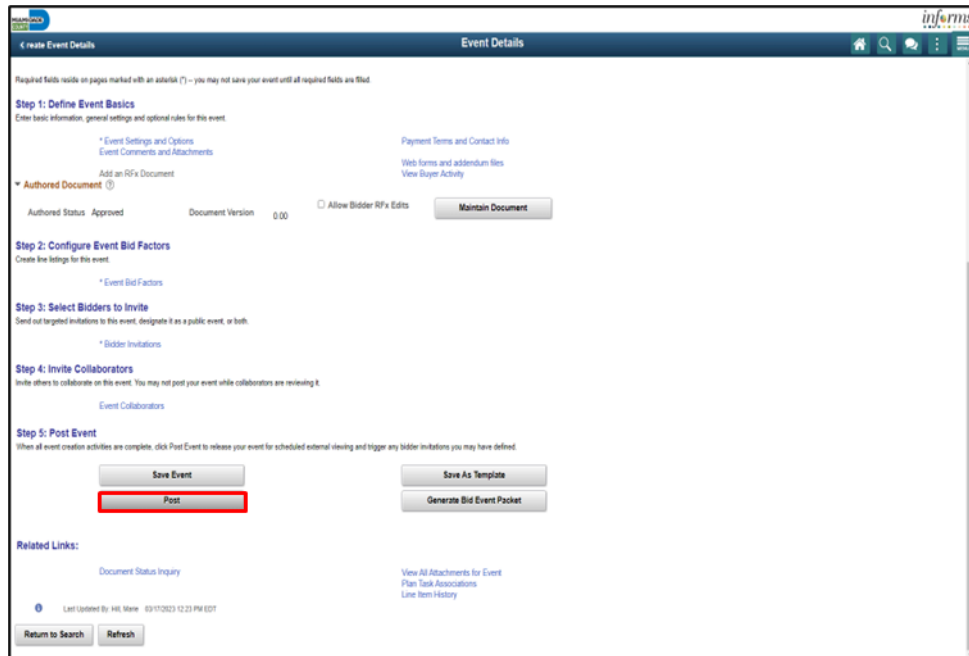
Record Attachments

Attachments

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
MD_M0004150	Another Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
GL_EVN001415_0101	Attachment Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
GL_EVN001415_1_1_Bid_Packet_03-19-2023.zip	Event Bid Package	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View

OK Cancel Refresh

38.

Select the **Post** button.


Event Details

Required fields inside on pages marked with an asterisk (*) – you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

* Event Settings and Options
Event Comments and Attachments
Payment Terms and Contact Info
Web forms and addendum files
View Buyer Activity

* Authored Document

Add an RFX Document

Authorized Status: Approved Document Version: 0.00 ☐ Allow Bidder RFX Edits [Maintain Document](#)

Step 2: Configure Event Bid Factors

Create line settings for this event.

* Event Bid Factors

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

* Bidder Invitations

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

Event Collaborators

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event [Save As Template](#) [Generate Bid Event Packet](#)

Post

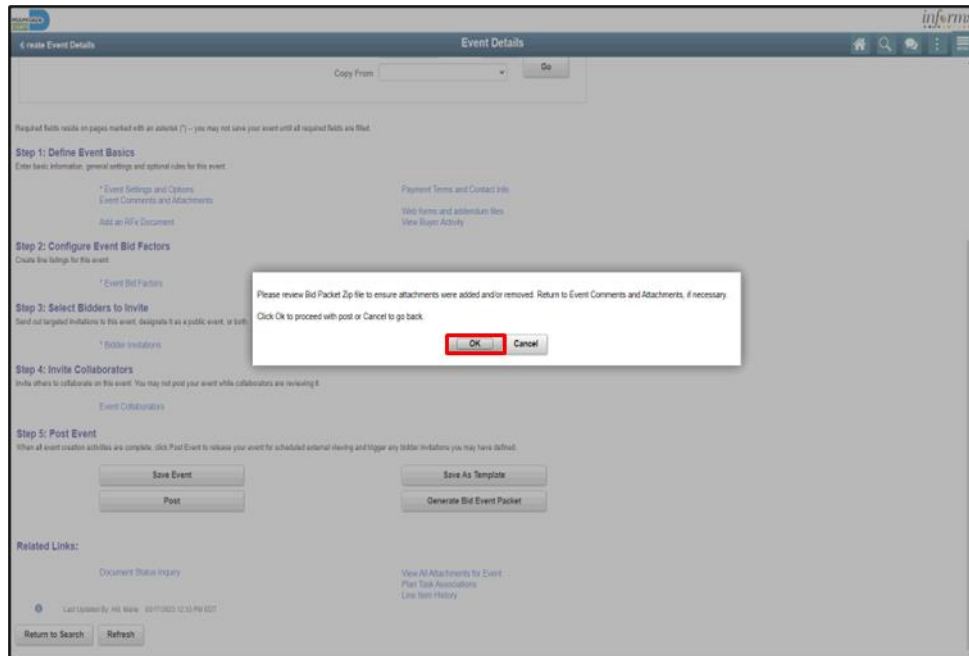
Related Links:

Document Status Inquiry [View All Attachments for Event](#)
[Plan Task Associations](#)
[Line Item History](#)

Last Updated By: ME, Name: 03/17/2023 12:23 PM EDT

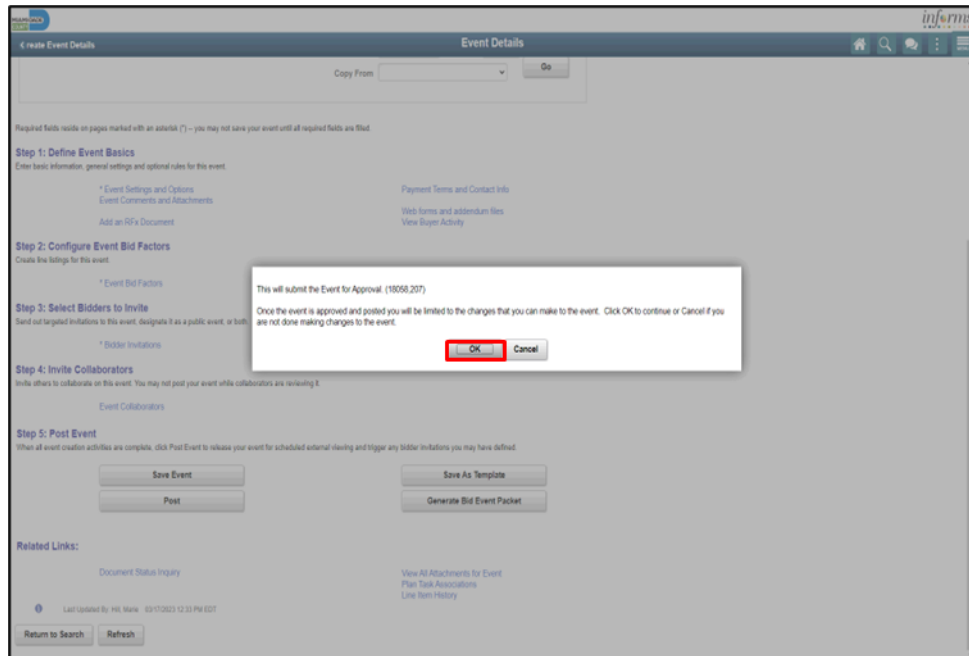
[Return to Search](#) [Refresh](#)

39.

Select the **OK** button.

The screenshot shows the 'Event Details' page in the INFORMS system. A modal dialog box is displayed in the center, containing the text: 'Please review Bid Packet Zip file to ensure attachments were added and/or removed. Return to Event Comments and Attachments, if necessary. Click OK to proceed with post or Cancel to go back.' The 'OK' button is highlighted with a red rectangle.

40.

Select the **OK** button.

The screenshot shows the 'Event Details' page in the INFORMS system. A modal dialog box is displayed in the center, containing the text: 'This will submit the Event for Approval. (18056,207) Once the event is approved and posted you will be limited to the changes that you can make to the event. Click OK to continue or Cancel if you are not done making changes to the event.' The 'OK' button is highlighted with a red rectangle.