Miami-Dade County

Strategic Sourcing: Create a New a RFI Event

Version 1.0

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***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.* *2*

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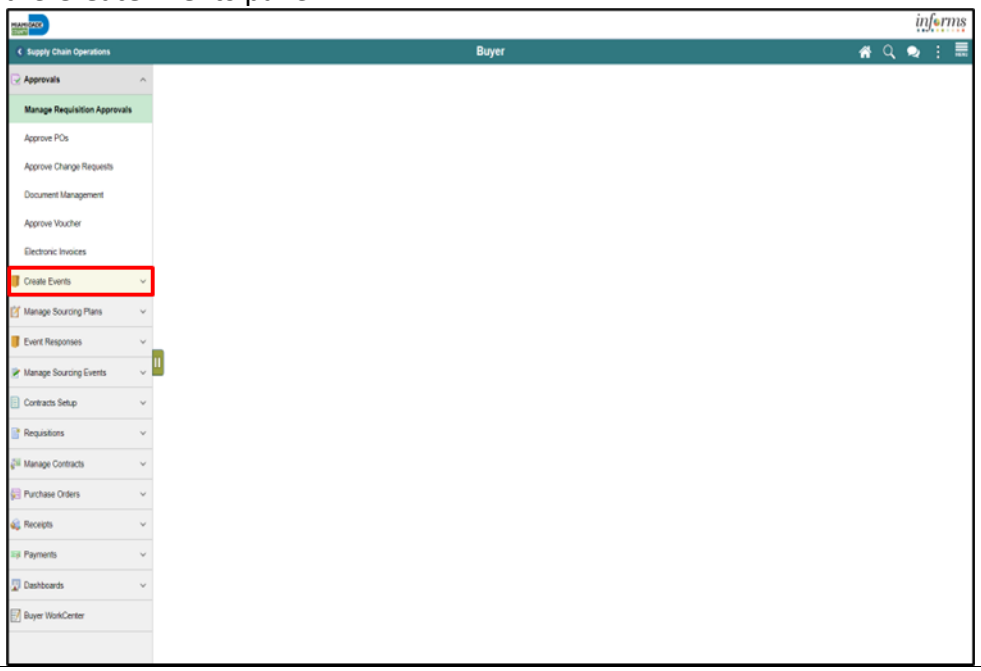
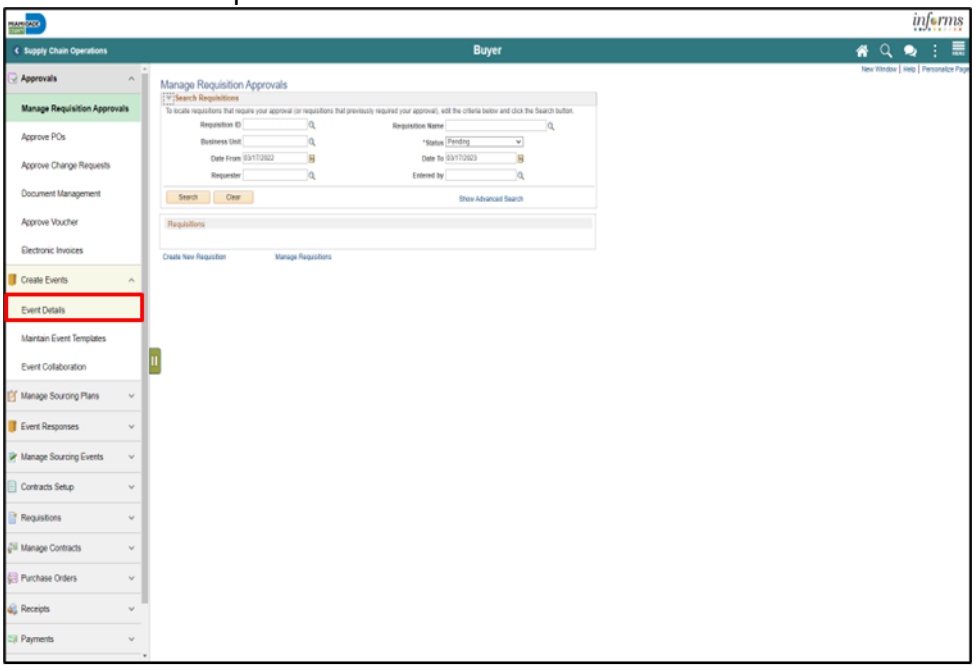
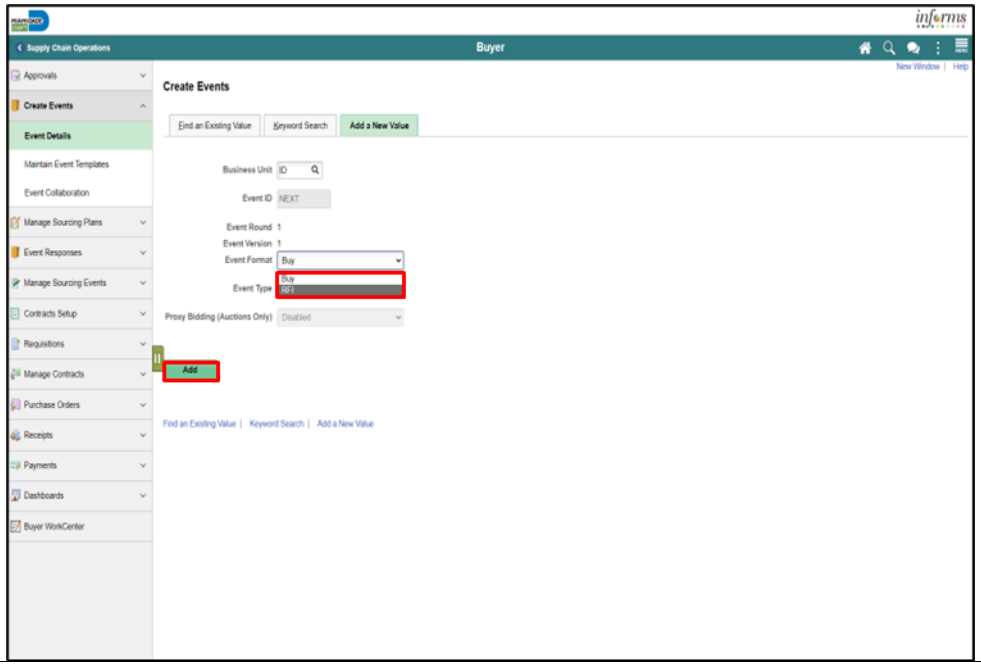
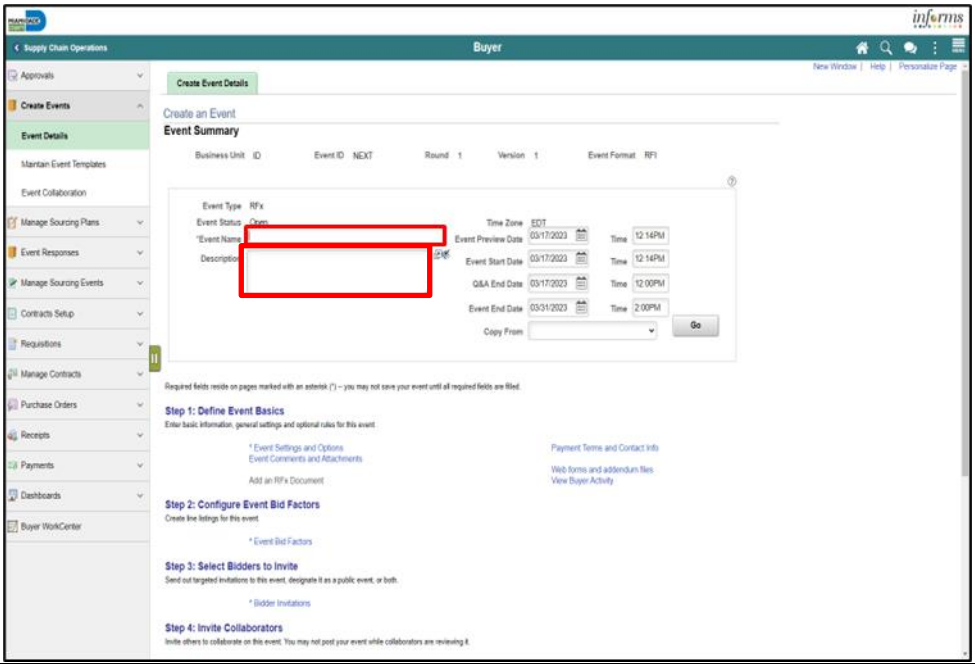
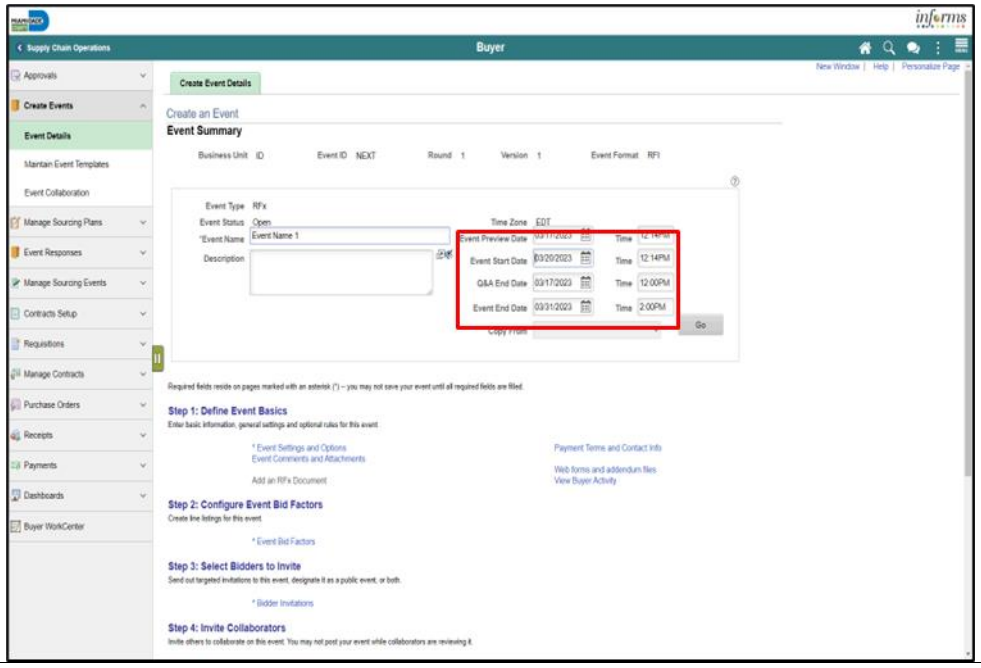
PURPOSE AND DESCRIPTION

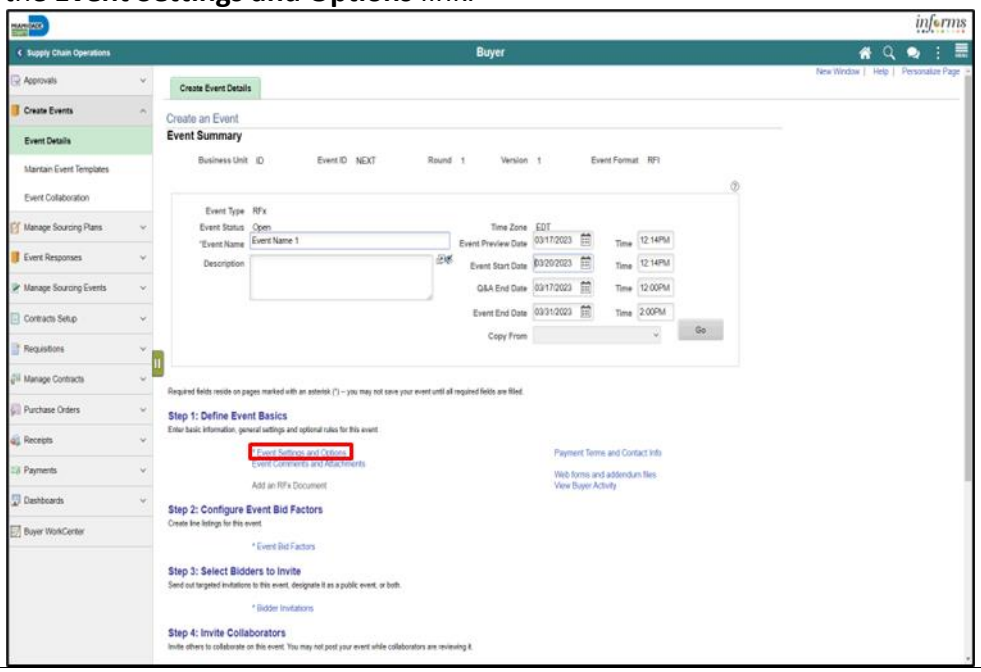
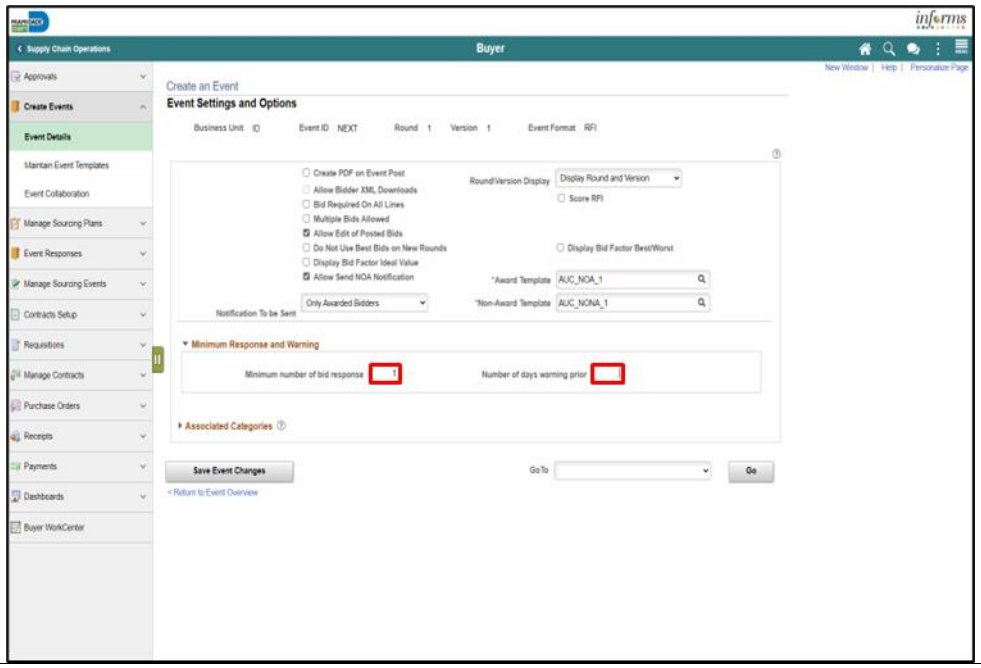
Purpose: This document explains the key activities involved in creating a new RFI event. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activity.

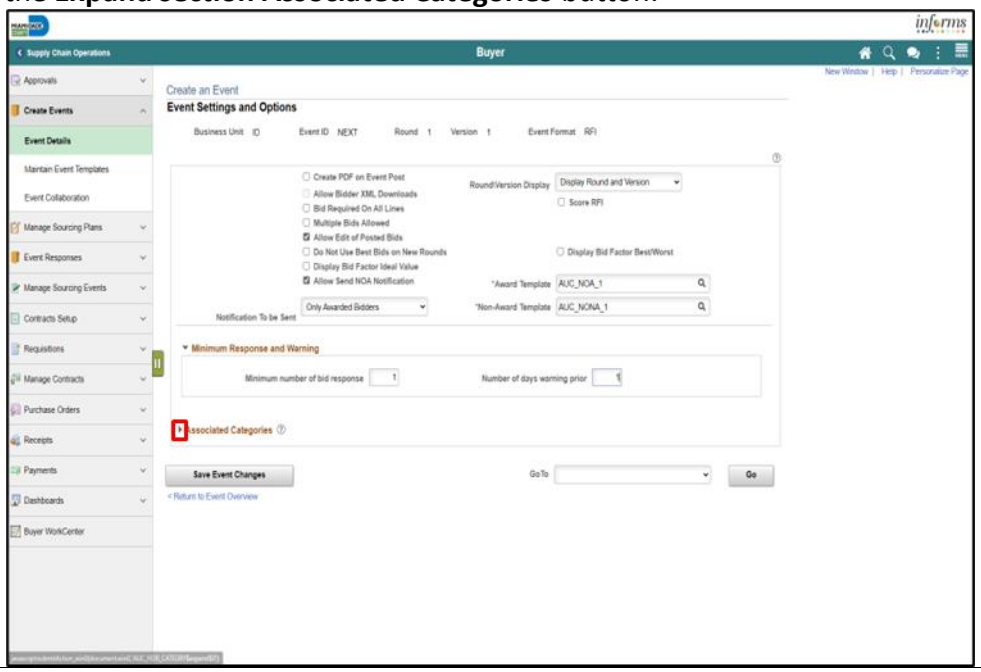
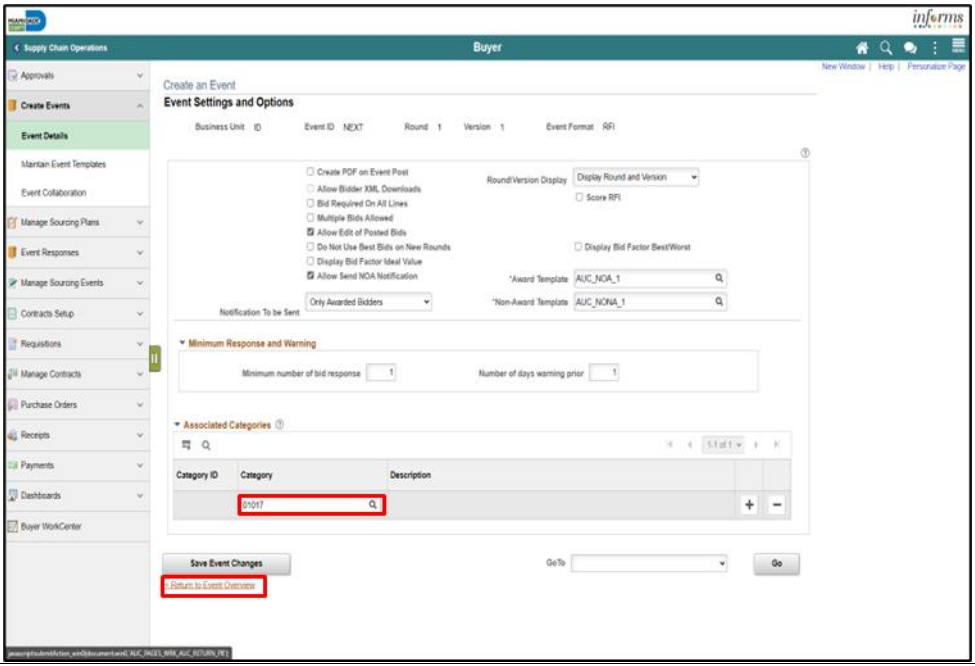
CREATE A NEW RFI EVENT

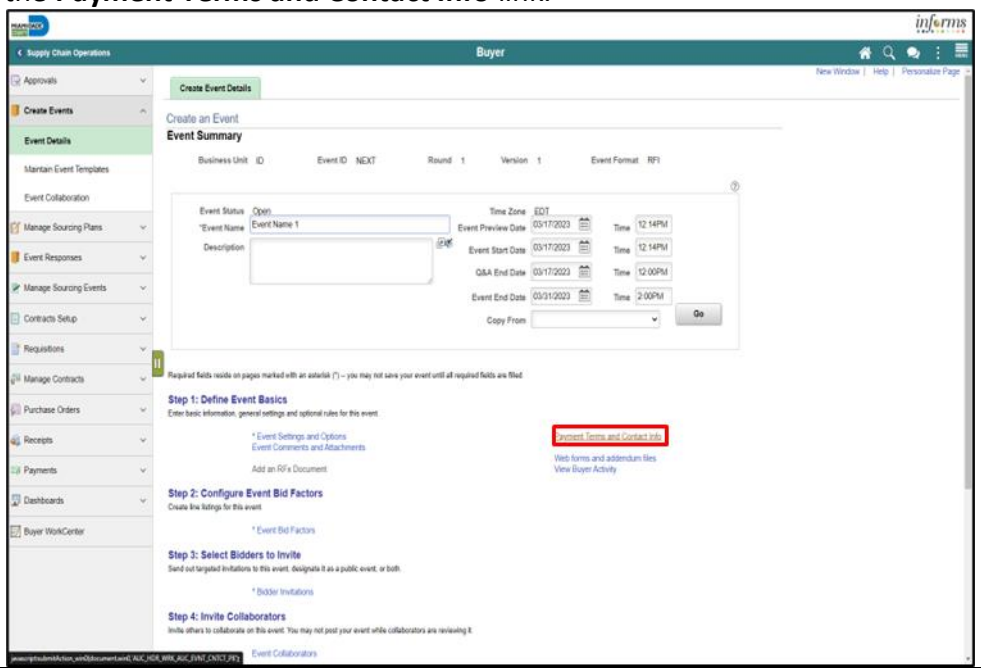
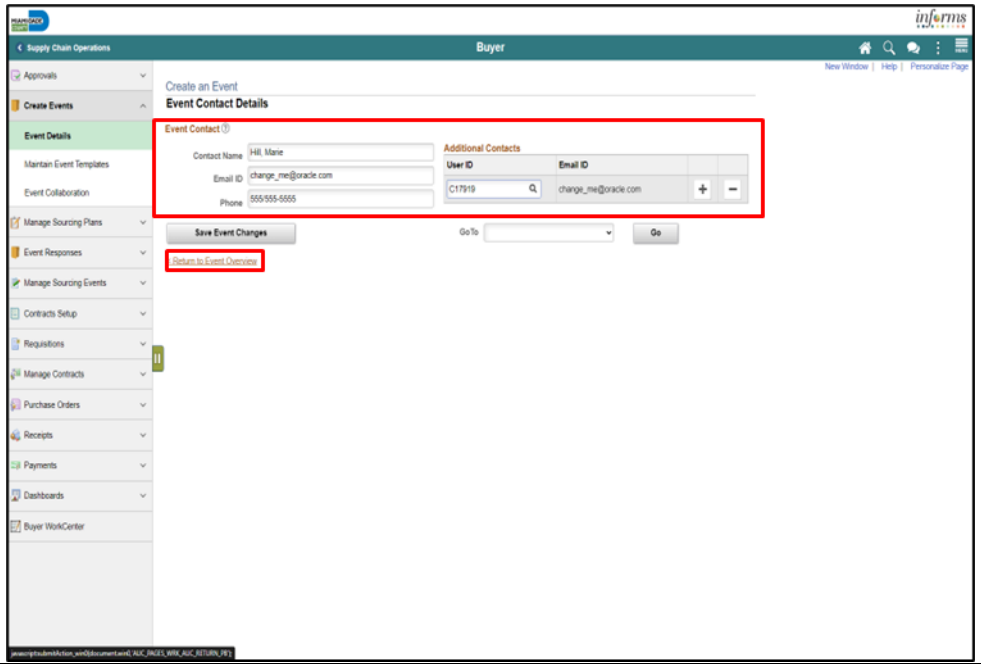
Step	Action
1.	Navigate to **Finance / Supply Chain (FSCM) > Supply Chain Operations > Buyer**
2.	Select the **Create Events** pane. 
3.	Select the **Event Details** pane. 

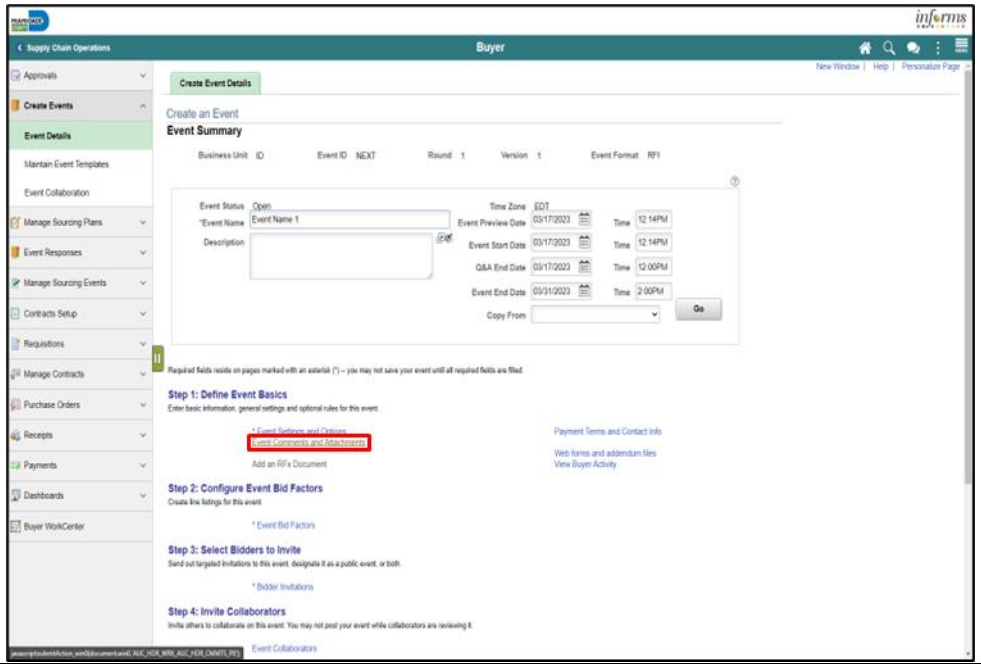
4.	Select **RFI** from the **Event Format** drop down. Select the **Add** button. 
5.	Enter the desired information into the **Event Name** field. Enter the desired information into the **Description** field. **Note**: The **Description** field is to be used for detailed information that won't otherwise fit in the **Event Name** field. 

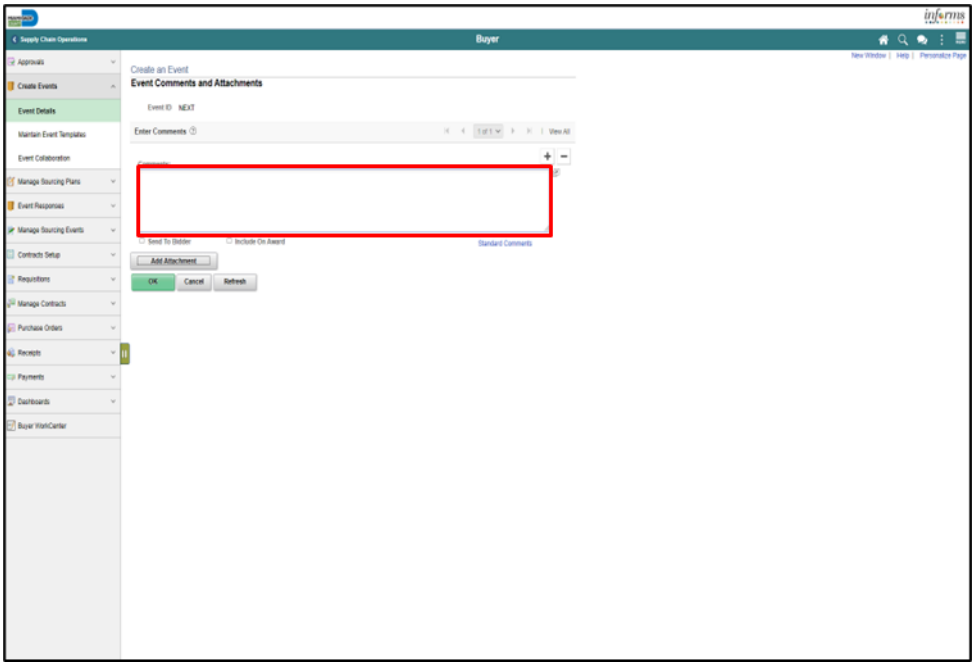
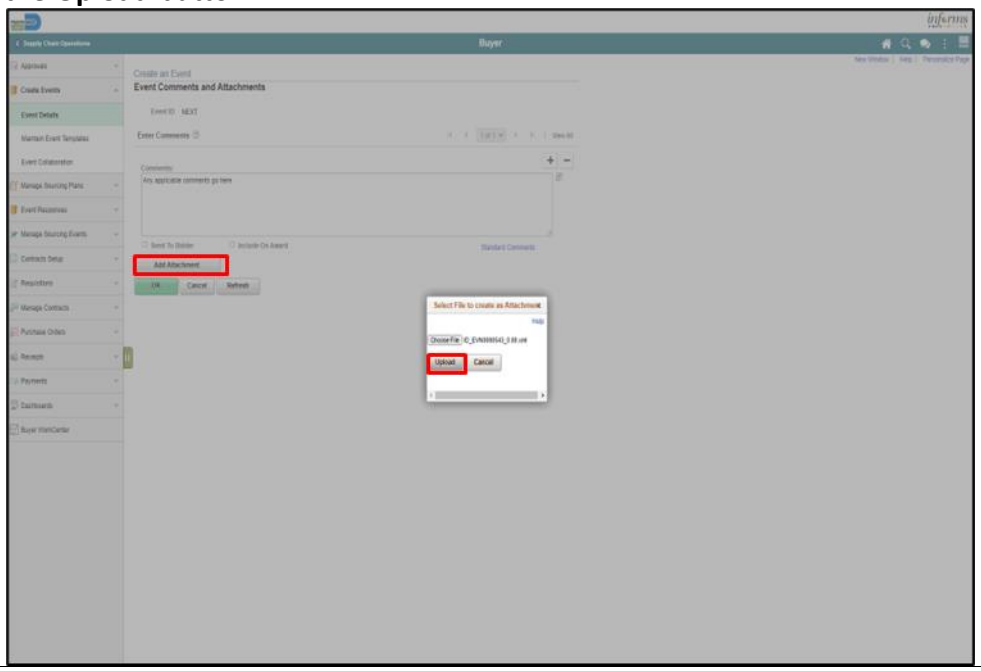
6.	**Event Preview Date**: The date that the event is available to potential bidders, allowing for review of the event, question submissions, and saving of bids, which can be posted as soon as the event starts. **Event Start Date**: The date when the bidders/suppliers can begin to post bids for the event.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

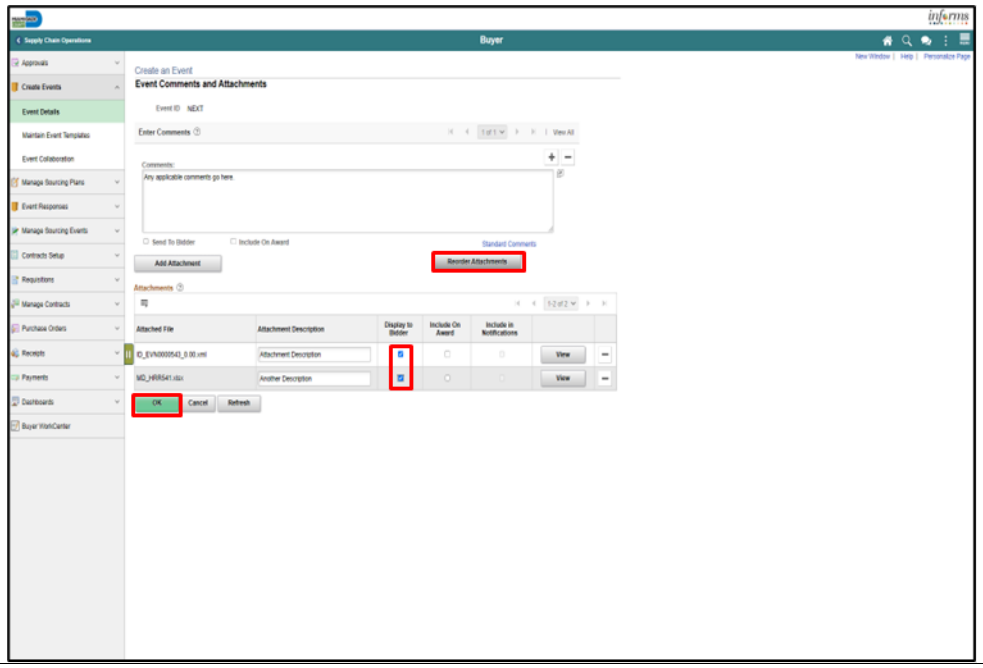
7.	Select the **Event Settings and Options** link. 
8.	Enter the desired information into the **Minimum number of bid response** field and **Number of days warning prior** field. **Note**: Do not edit the selections in the section above. 

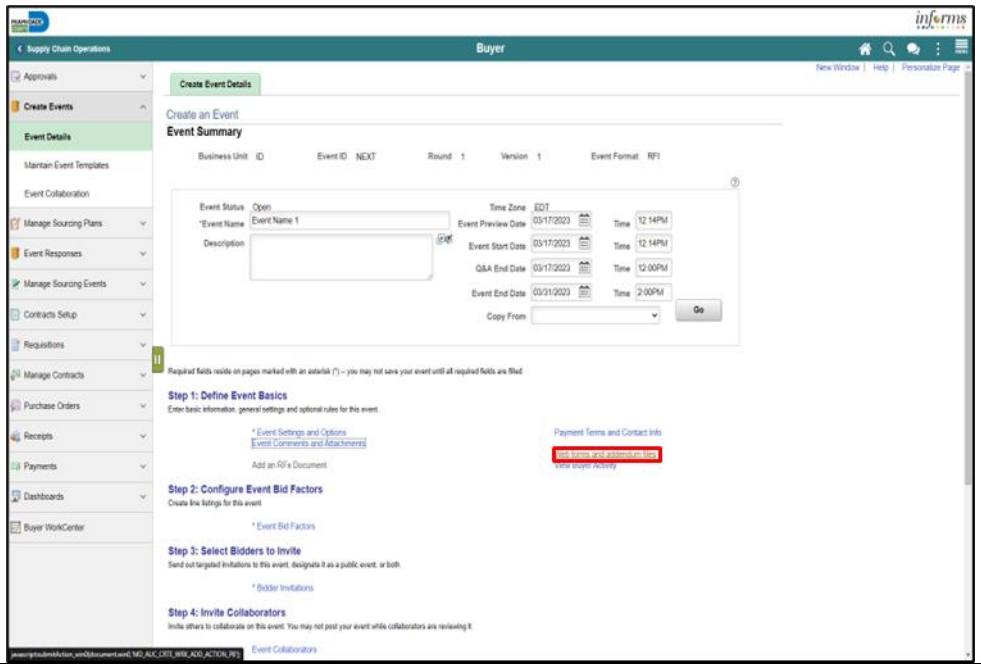
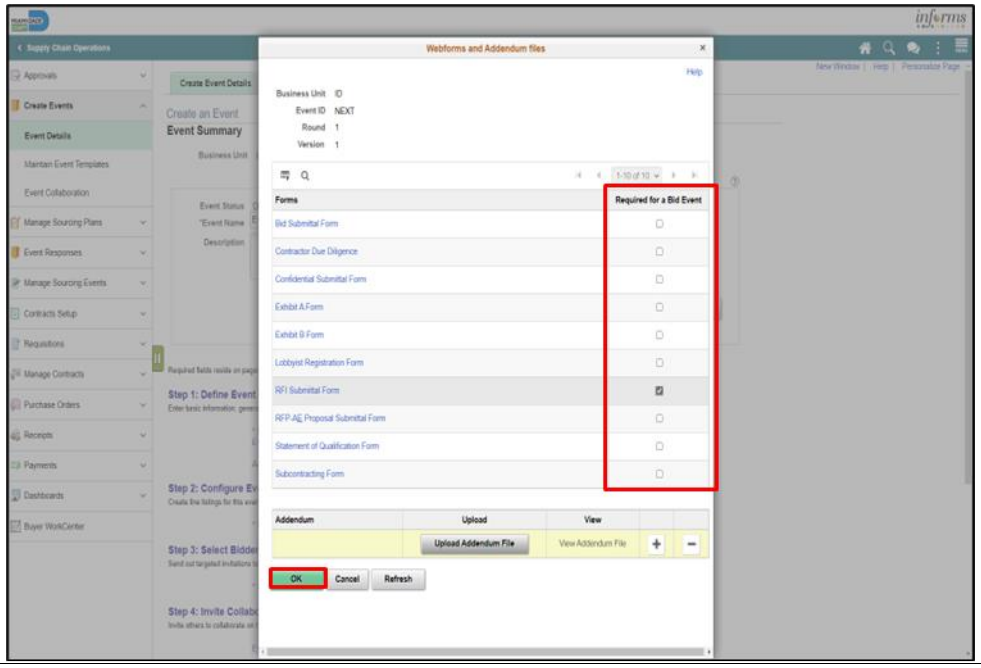
9.	Select the **Expand section Associated Categories** button. 
10.	**Category Code**: The category code associated with the event. Bidders/Suppliers will be searched based on the associated categorization. Enter or search for the desired information in the **Category** field. Select the **< Return to Event Overview** link. 

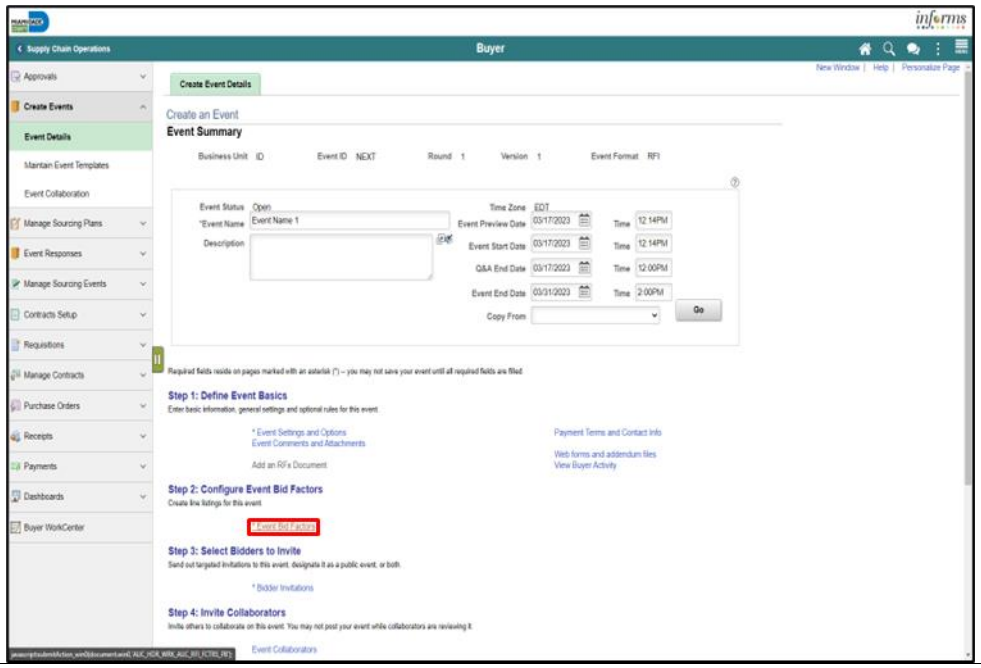
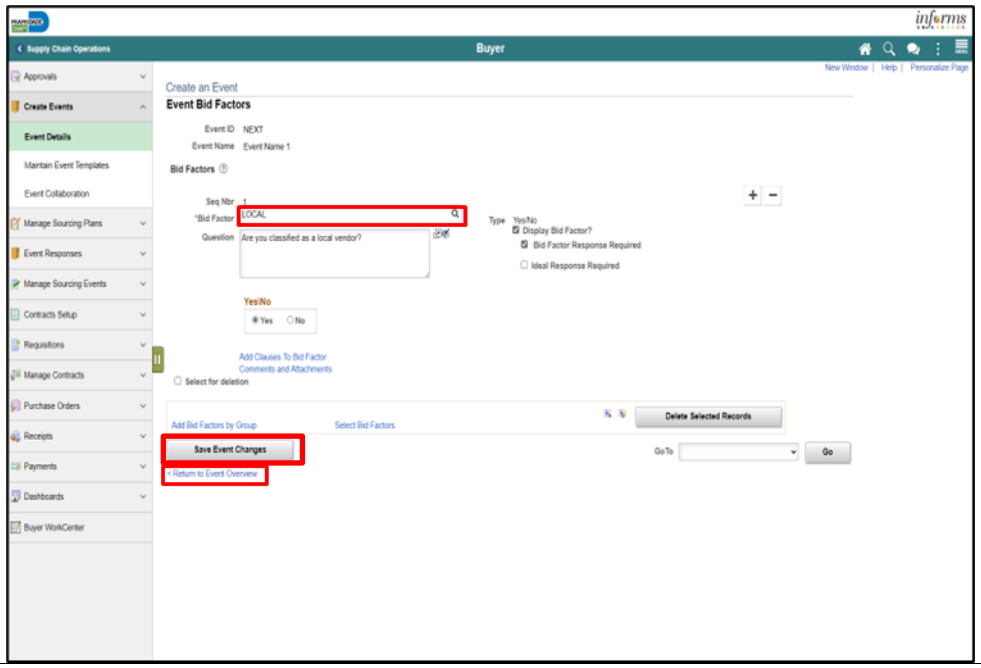
11.	Select the **Payment Terms and Contact Info** link. 
12.	Enter or correct **Event Contact** details. • **Contact Name** • **Email ID** • **Phone** Enter or search for **Additional Contacts**. • **User ID** to be notified of **Event Q&A Forum** questions**.** **Note:** If any questions are asked by bidders, Clerk of the Board will be notified. Select the **< Return to Event Overview** link. 

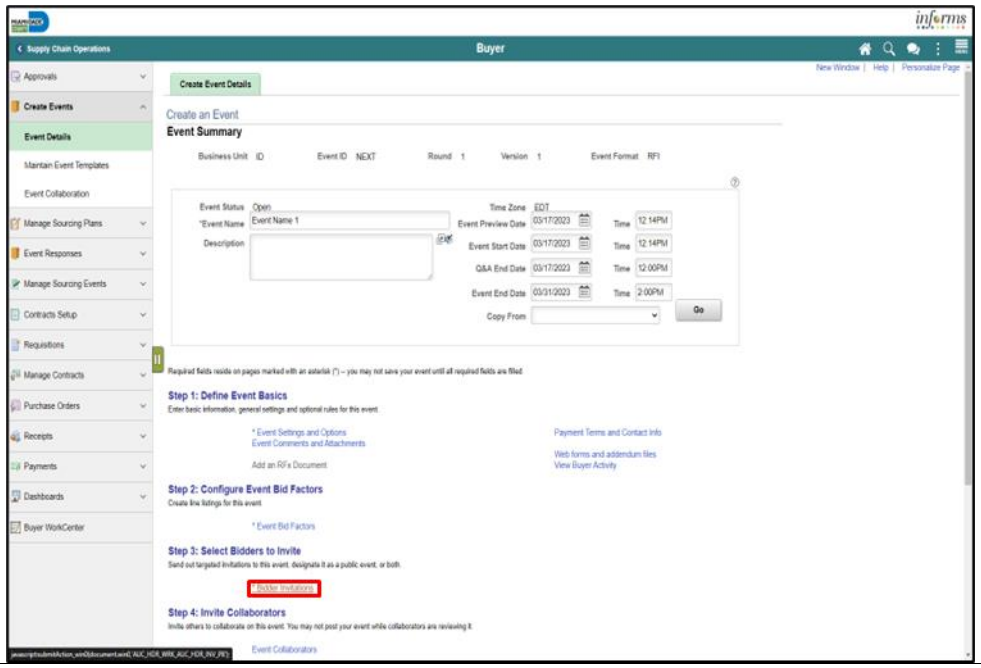
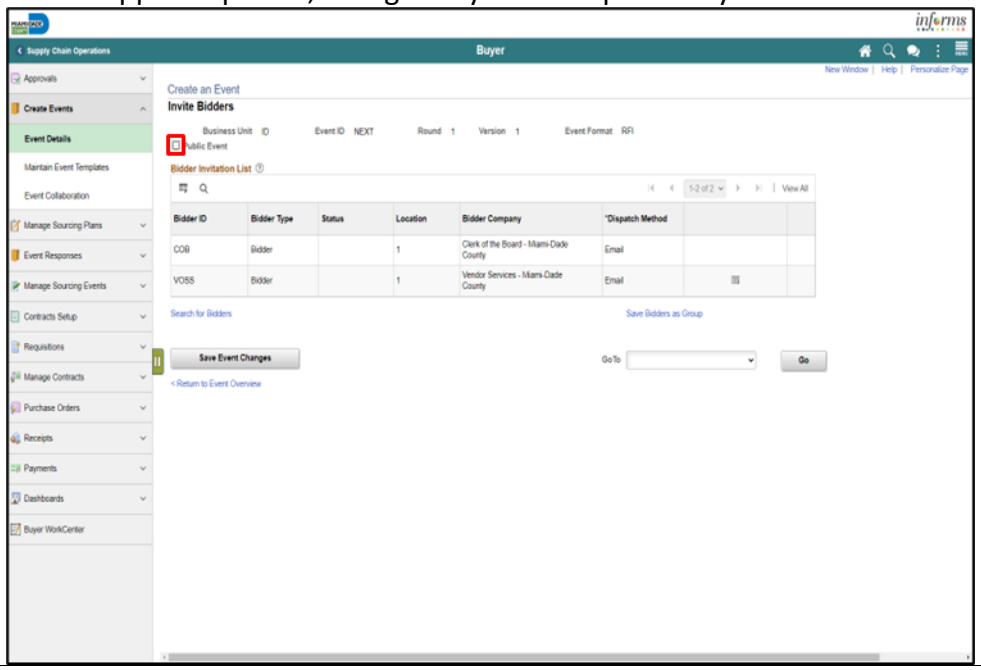
	The next Section is "**Event Comments and Attachments**". The buyer should enter any specific comments for the event. **Send to Bidder** field: Select to enable the bidder to see the comment. **Include on Award** field: Select to enable the comments to appear on the contract or purchase order award. **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. 

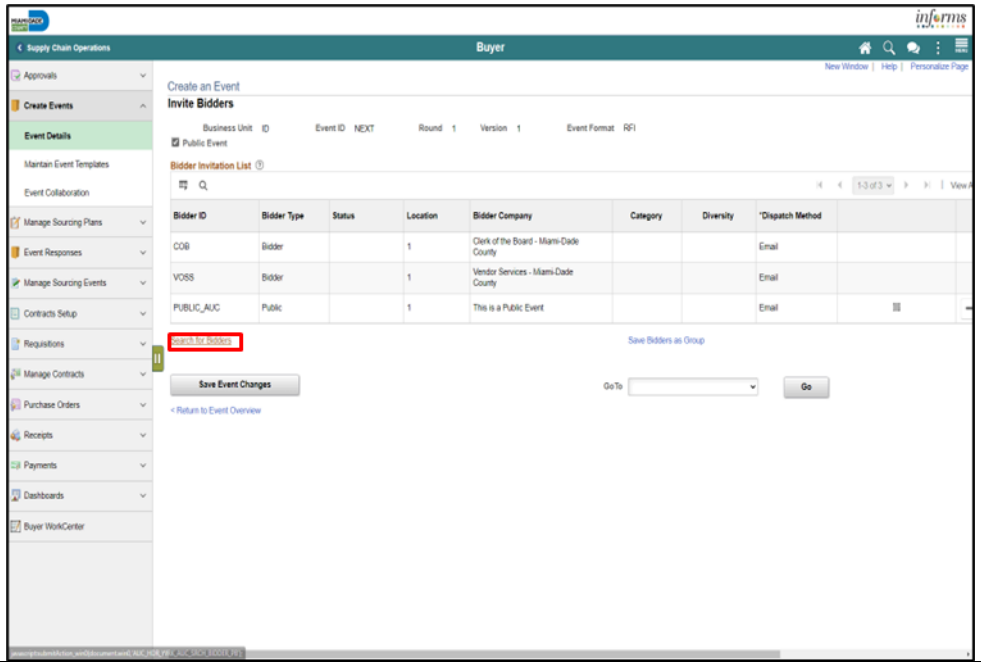
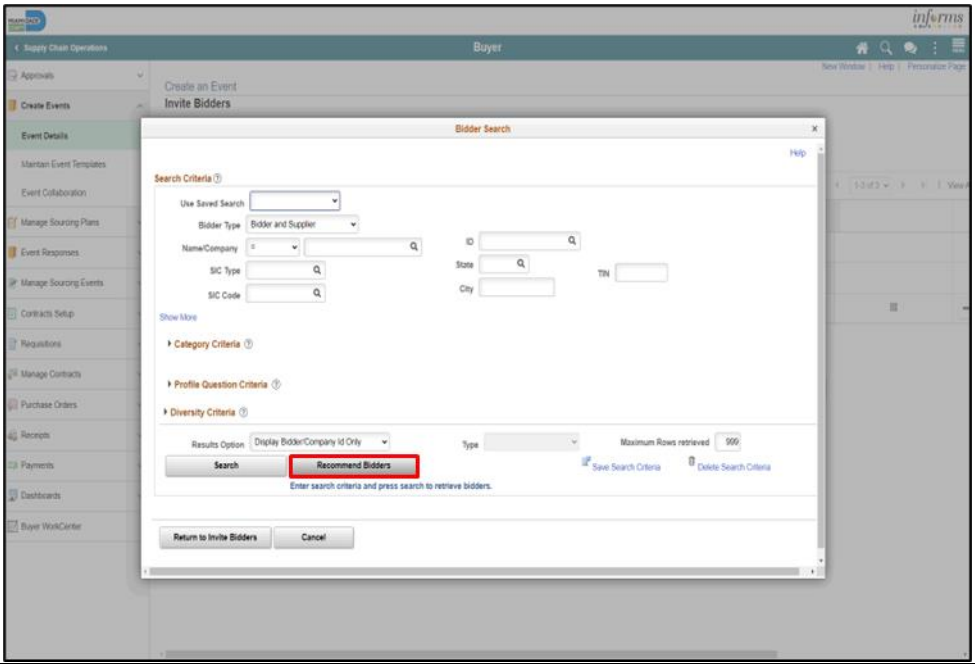
14.	Enter the desired information into the **Comments** field. **Note**: Select the **Send To Bidder** checkbox if the comments are intended for the bidder. 
15.	Select the **Add Attachment** button. Select the **Choose File** button. Select the desired file. **Note**: The file name has a 30 Character Limit. Select the **Open** button. Select the **Upload** button. 

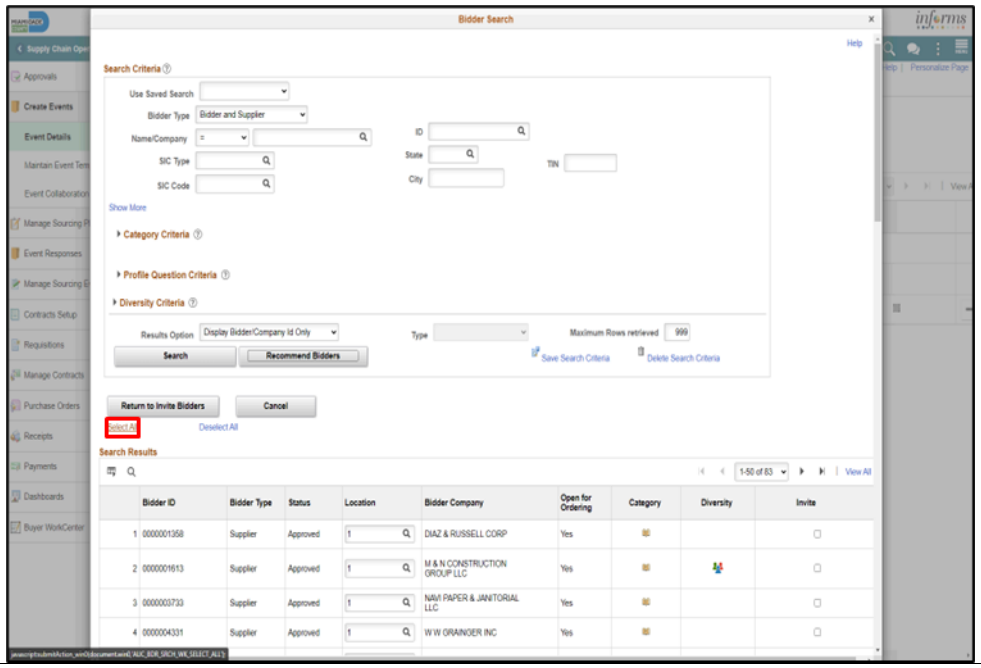
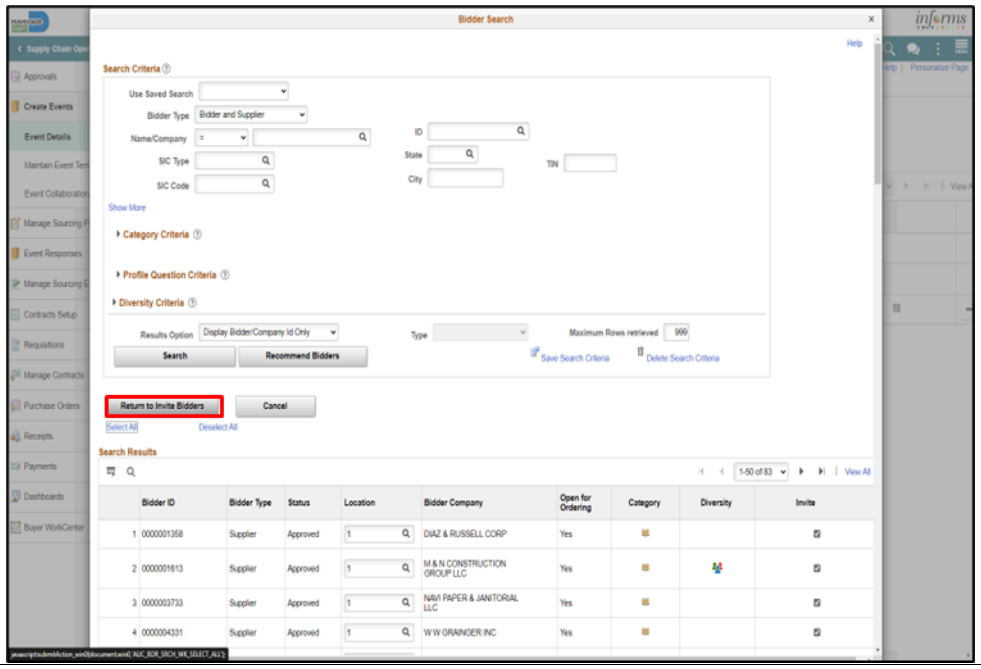
16.	Enter the desired information into the **Attach Description** field. *Optional: Select the **Display to Bidder** and/or **Include On Award** option.* **Note**: The Bid Event Packet only includes attachments designated with the Display to Bidder checkbox. If more than one attachment is added, the **Reorder** button allows for a resequencing of the attachments. The attachment option is available; however, it is not required. Select the **OK** button. 

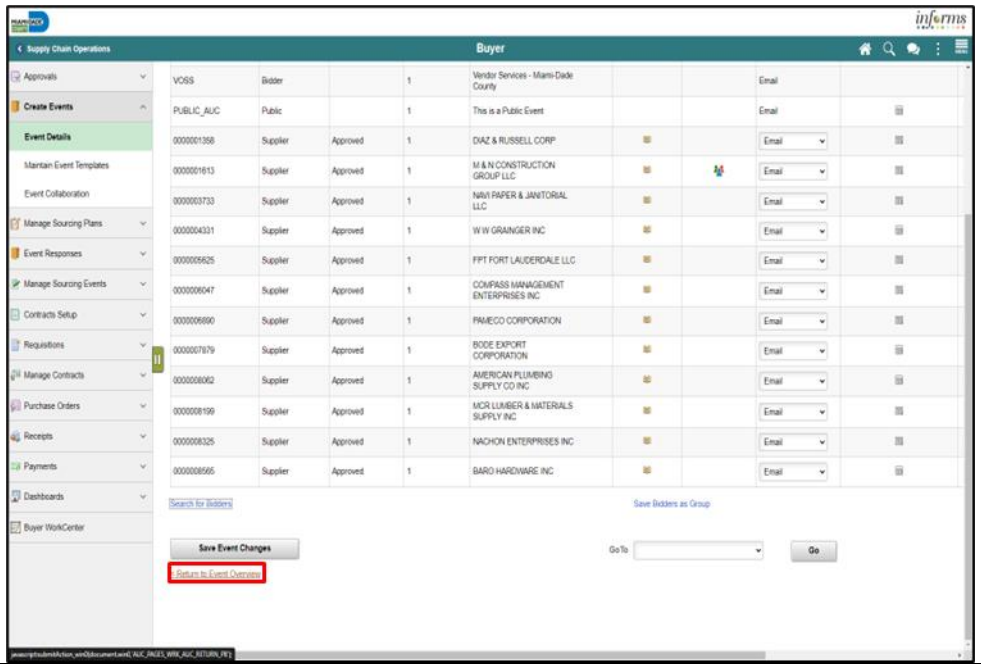
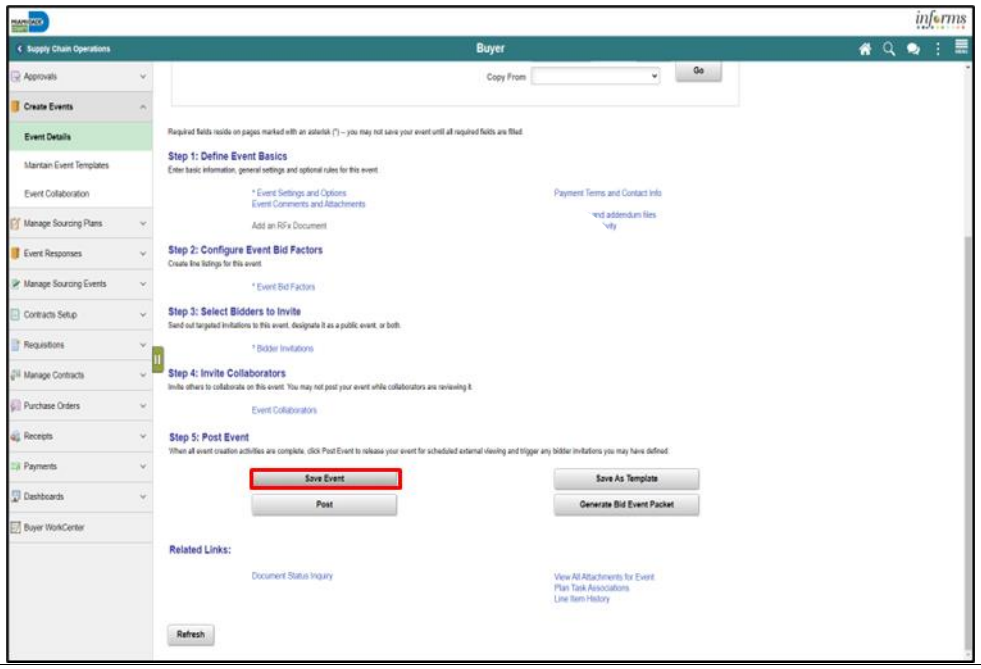
17.	Select the **Web forms and addendum files** link. 
18.	Select the appropriate form(s) by checking the **Required for a Bid Event** box. Select the **OK** button. 

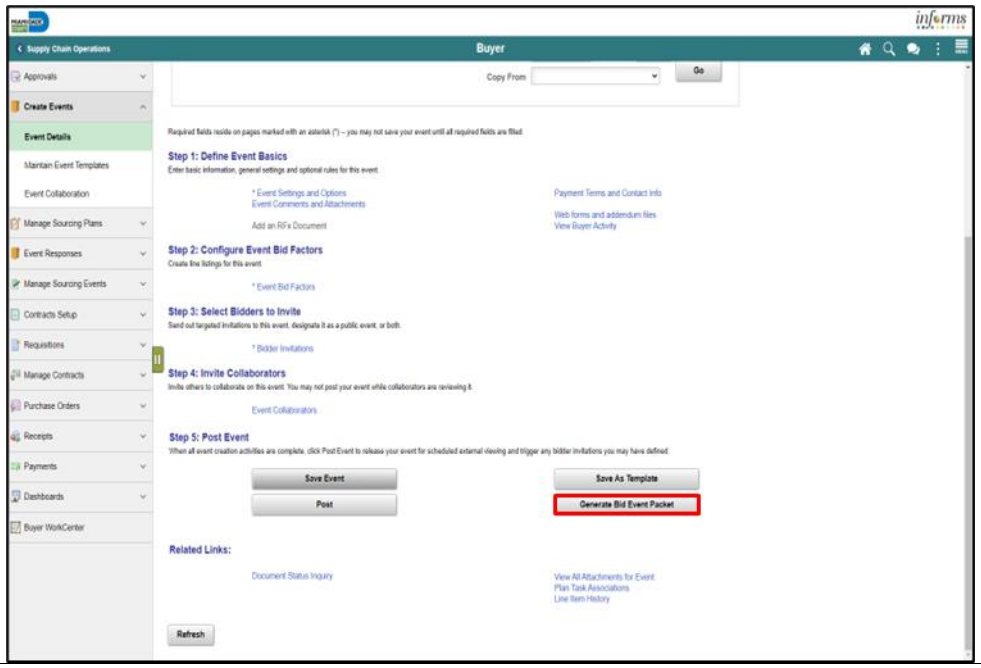
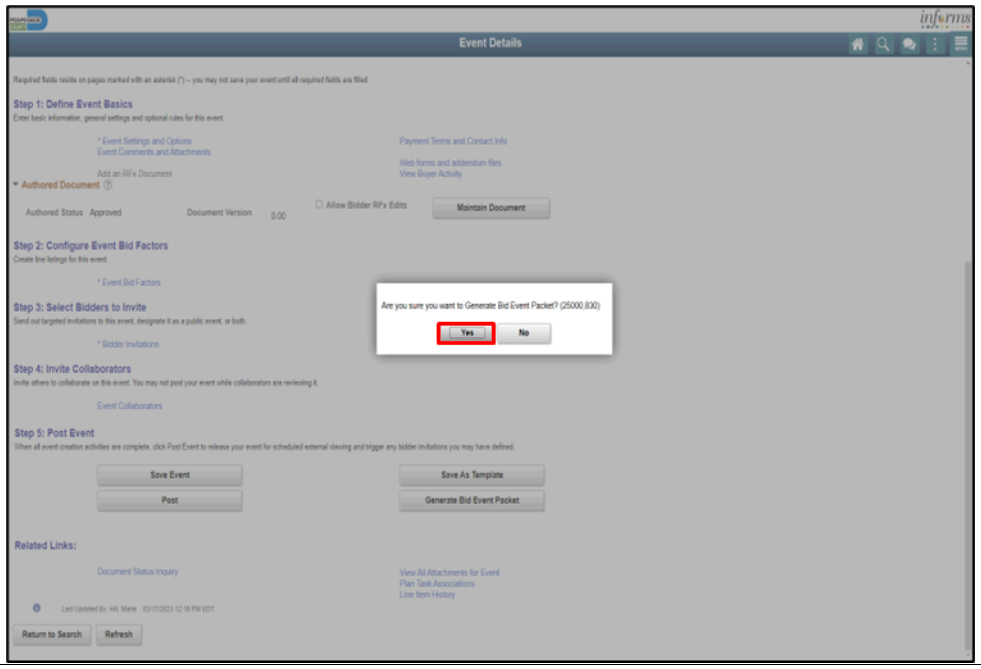
19.	Select the **Event Bid Factors** link. 
20.	Enter or search for the **Bid Factor**. Select the **Save Event Changes** button. Select the **< Return to Event Overview** link. 

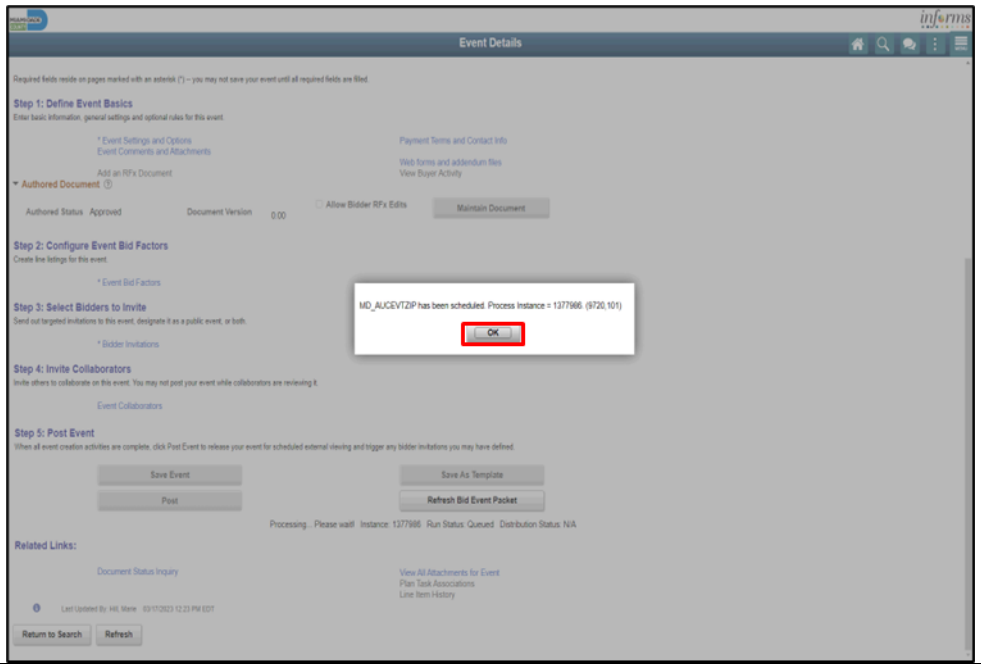
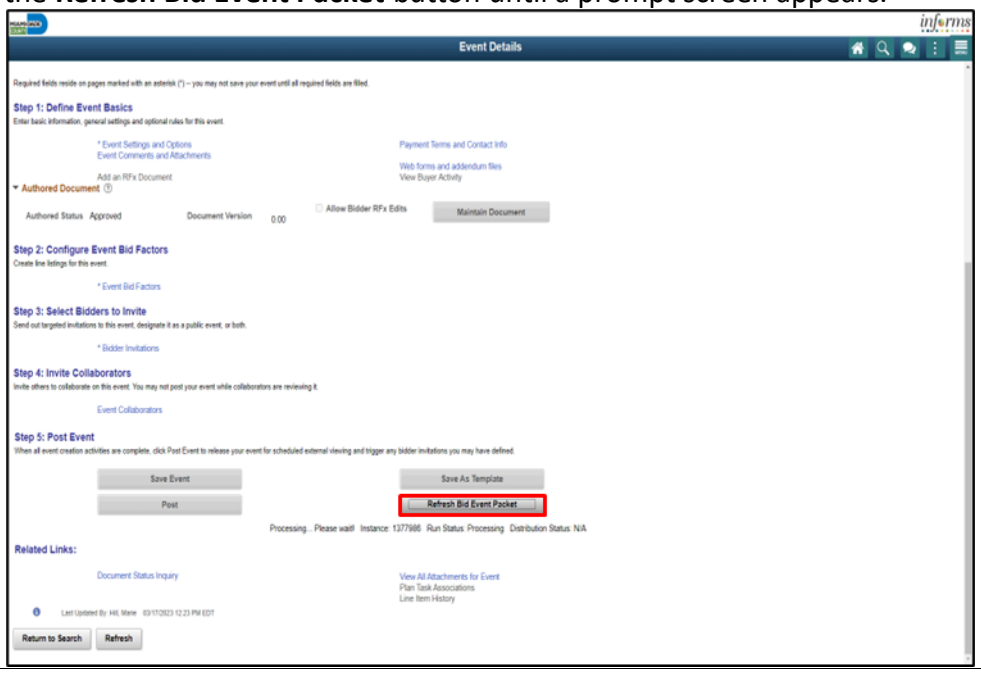
21.	Select the **Bidder Invitations** link. 
22.	Select the **Public Event** option. **Note**: When an event is public, all Bidders and Suppliers that are in the system will be notified automatically if the categories of the event match the categories from the Bidder's and Supplier's profile, though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

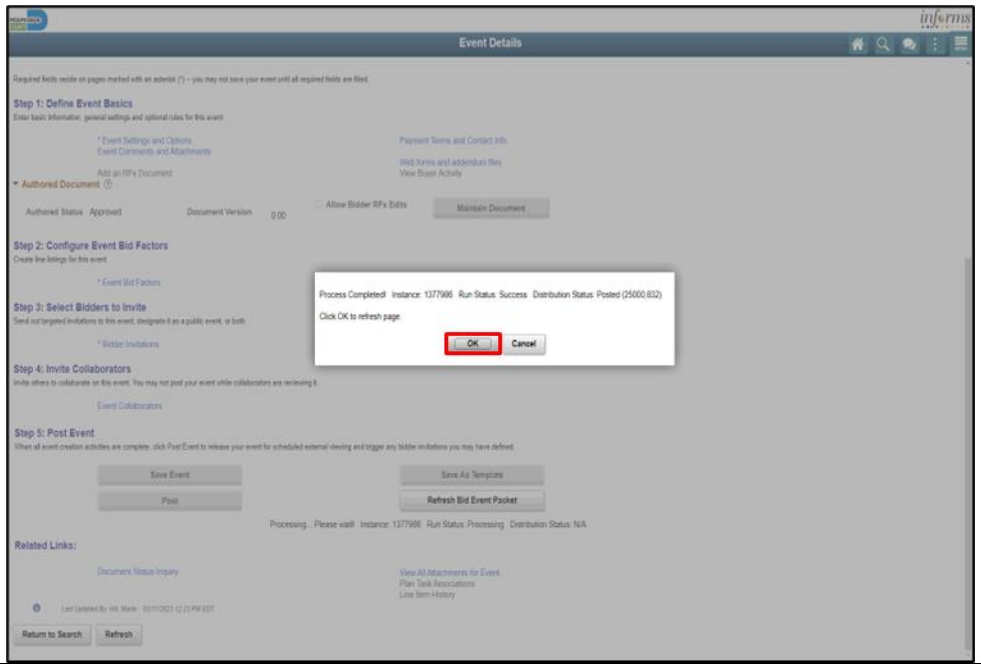
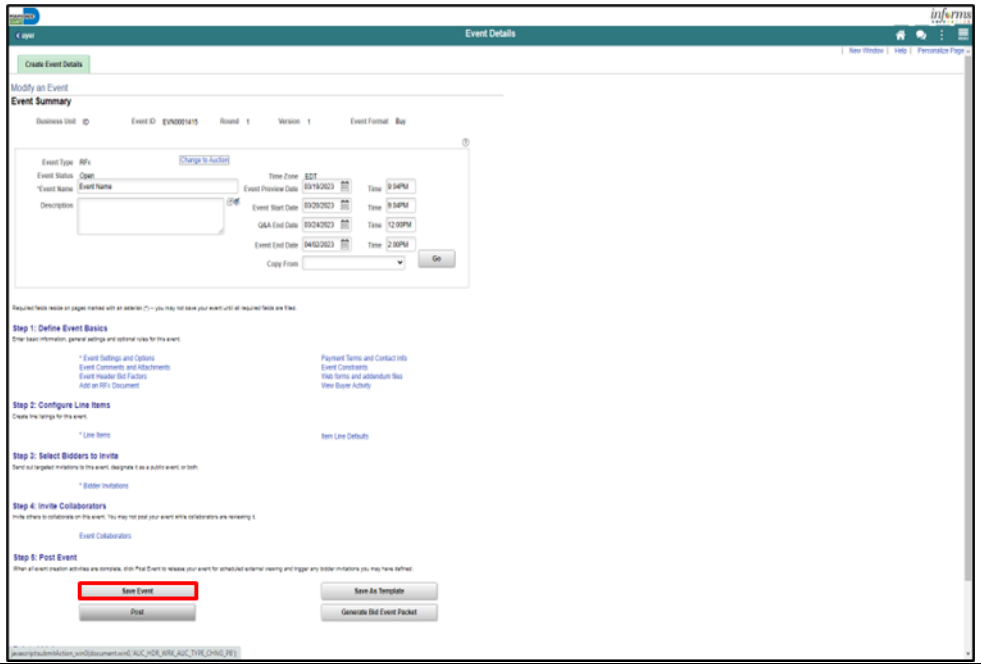
23.	**Note**: Clerk of the Board and Vendor Services will be notified when the event is posted. Select the **Search for Bidders** link. 
24.	Select the **Recommend Bidders** button, if applicable. **Note**: Bidders should be recommended only if the event is Public. If sourcing from a bidder group, select the **Show More** link and enter the **Contract ID** in the **Group Name** field, then select the **Search** button. 

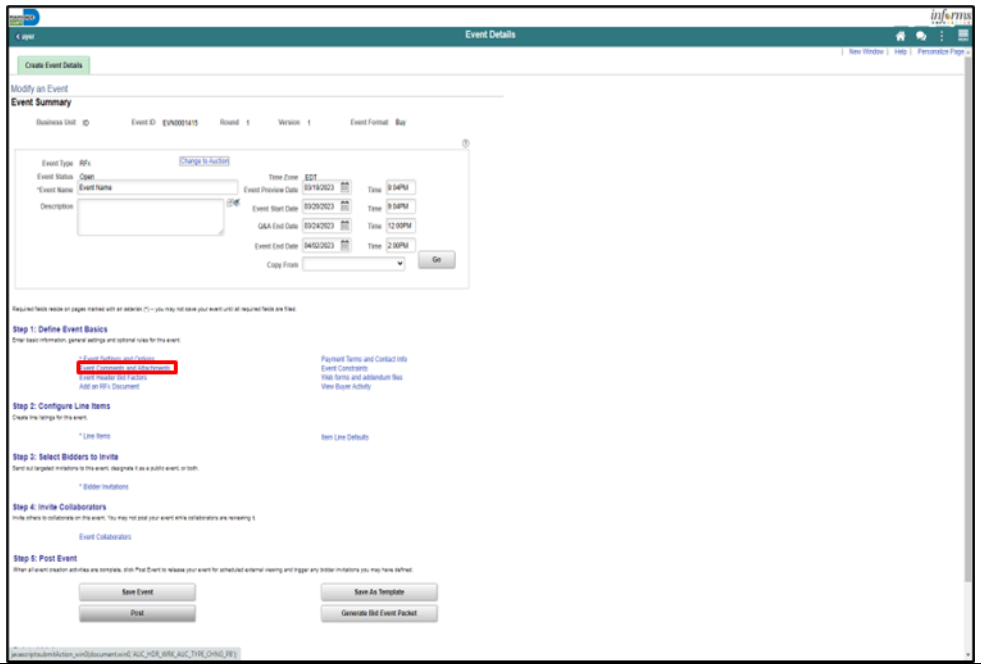
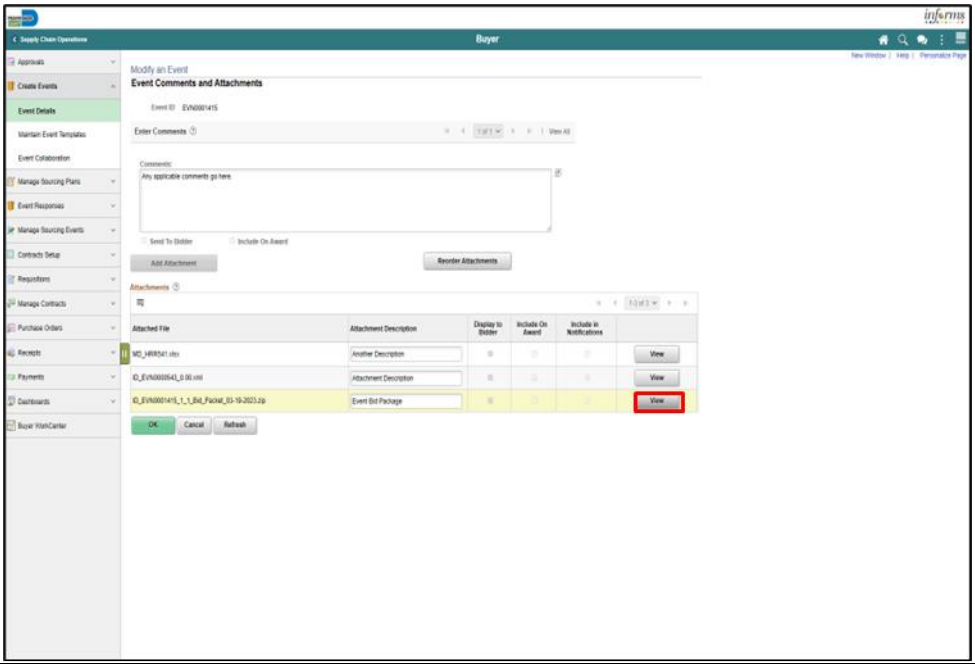
25.	Select the **Select All** link. 
26.	Select the **Return to Invite Bidders** button. 

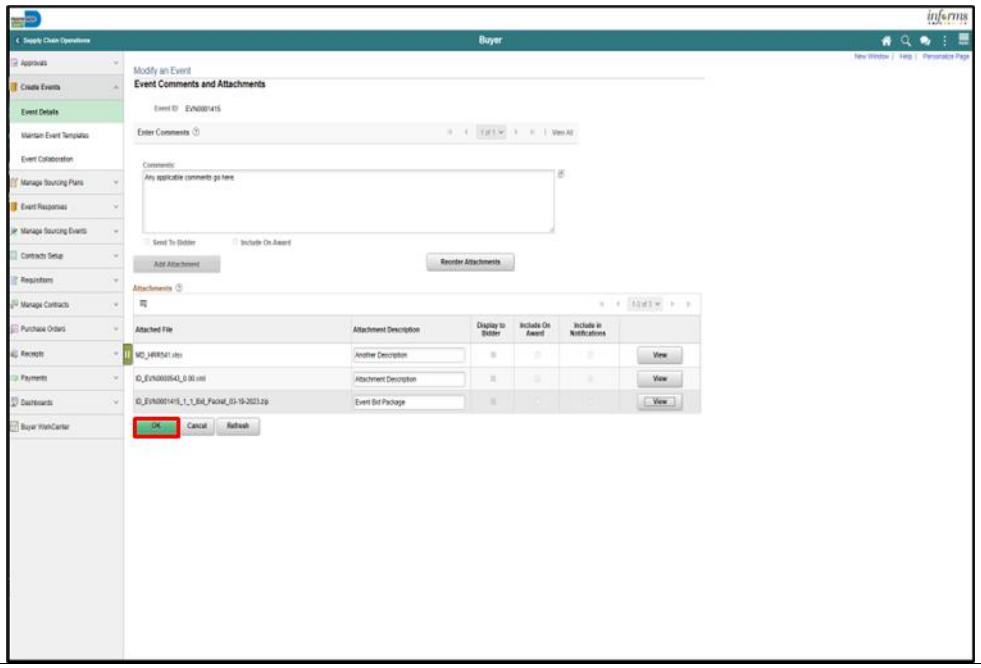
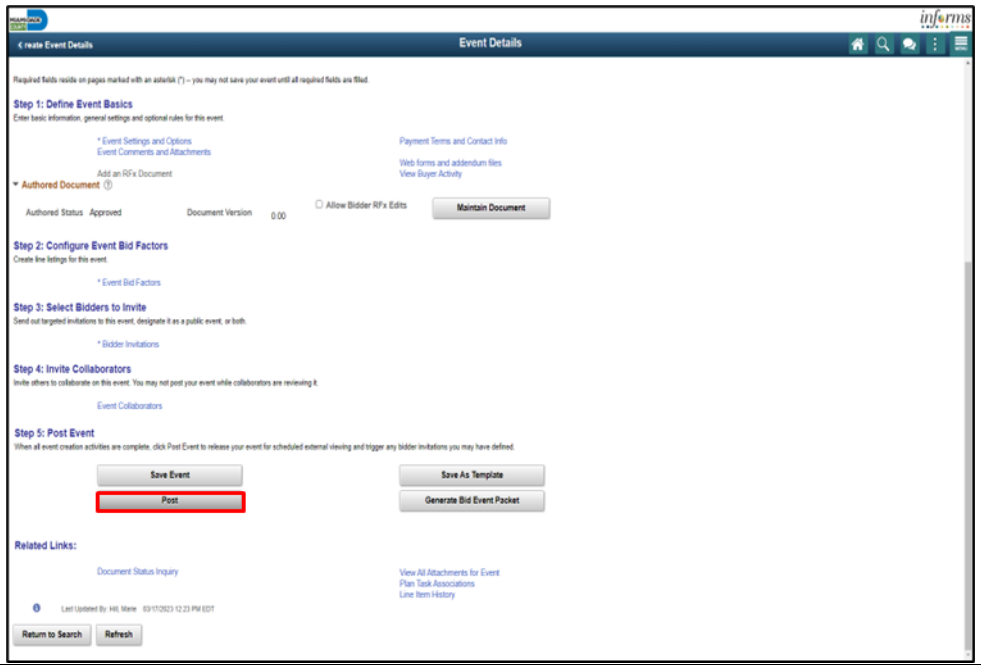
27.	Select the **< Return to Event Overview** link. 
28.	Select the **Save Event** button. 

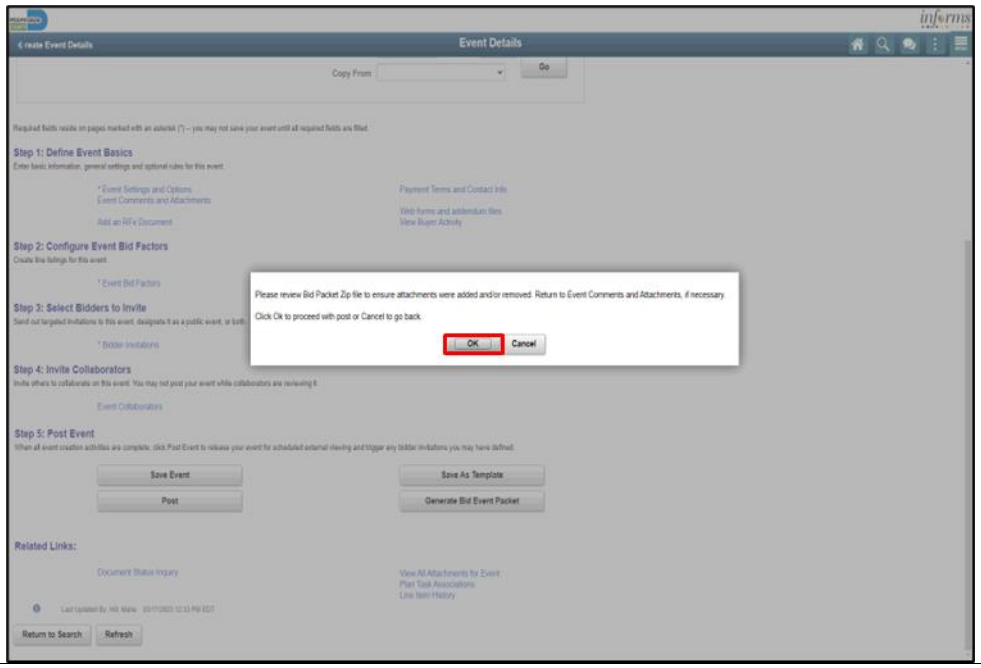
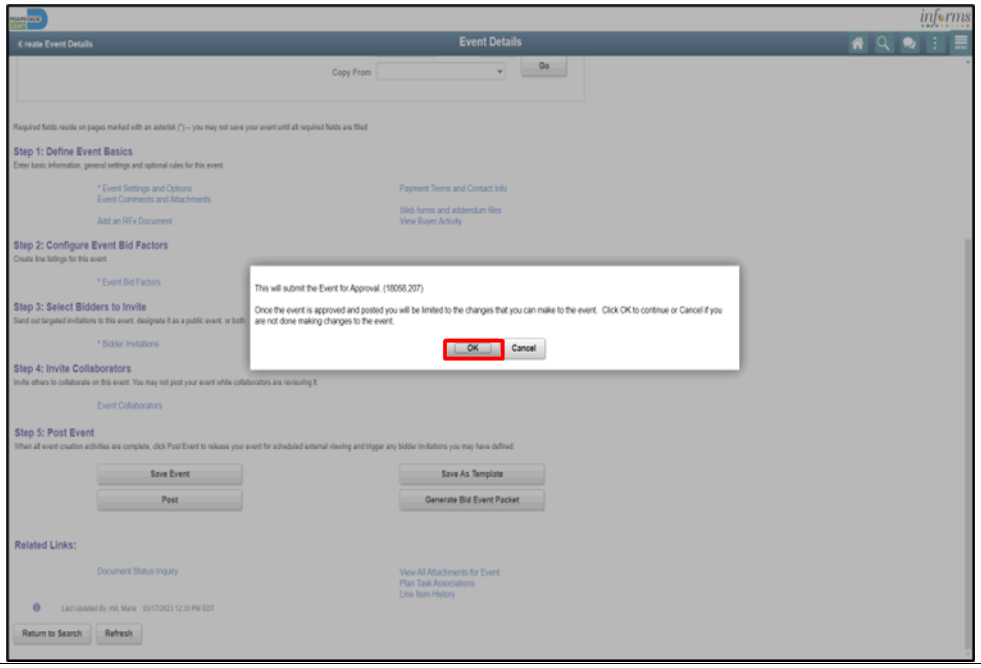
29.	Select the **Generate Bid Event Packet** button. 
30.	Select the **Yes** button. 

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

33.	Select the **OK** button. 
34.	Select the **Save Event** button. 

35.	Select the **Event Comments and Attachments** link. 
36.	View the **Event Bid Package** to ensure all documents were loaded into the .pdf file. Select the **View** button. 

37.	Select the **OK** button. 
38.	Select the **Post** button. 

39.	Select the **OK** button. 
40.	Select the **OK** button.