

Course ID: SCM 204

Course: Supply Chain Management – RFI Event

Start Time: 8:35 AM

# Course Overview

<b>Course Description</b>	<p>This course provides a comprehensive review of the Strategic Sourcing processes.</p> <p>This course consists of the following modules:</p> <ul style="list-style-type: none"><li>• Module 1: Course Introduction</li><li>• Module 2: Creating an RFI Event<ul style="list-style-type: none"><li>• Lesson 1: Create an RFI Event</li><li>• Lesson 2: Invite Bidders</li><li>• Lesson 3: Supervisor Approval</li><li>• Lesson 4: Submitting a Bid</li><li>• Lesson 5: Evaluate RFI Submissions</li></ul></li><li>• Module 3: Conclusion</li></ul>
<b>Training Audiences</b>	<ul style="list-style-type: none"><li>• Strategic Sourcing Buyer</li><li>• Strategic Sourcing Event Approver</li><li>• Strategic Sourcing Event Collaborator</li></ul>

# Course Overview

<b>Prerequisites</b>	<ul style="list-style-type: none"><li>• ERP 101 – Overview of INFORMS</li><li>• ERP 102 – INFORMS Navigation, Reporting, &amp; Online Help</li><li>• SCM 101 – Supply Chain Fundamentals</li></ul>
<b>Estimated Duration</b>	

# Course Outline

## Content

Module 1: Course Introduction

Module 2: Creating an RFI Event

- Lesson 1: Create an RFI Event
- Lesson 2: Invite Bidders
- Lesson 3: Supervisor Approval
- Lesson 4: Submitting a Bid
- Lesson 5: Evaluate RFI Submissions

Module 3: Conclusion

# Module 1: Course Introduction

## Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Key Changes to the Business Process

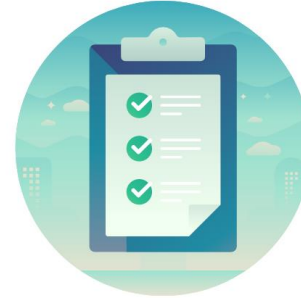
The End-to-End Business Process

Introduction to Demonstrations, Activities, and Exercises

# Ground Rules



Be on time



Attendance



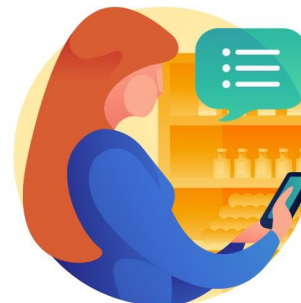
Turn off your cell phones when in class



Take breaks as needed



Participate actively in class; refrain from email and internet use



Feel free to ask questions

# Learning Objectives

At the conclusion of this course, participants will be able to:

- Create an RFI Event
  - Lesson 1: Create an RFI Event
  - Lesson 2: Invite Bidders
  - Lesson 3: Supervisor Approval
  - Lesson 4: Evaluate RFI Submissions

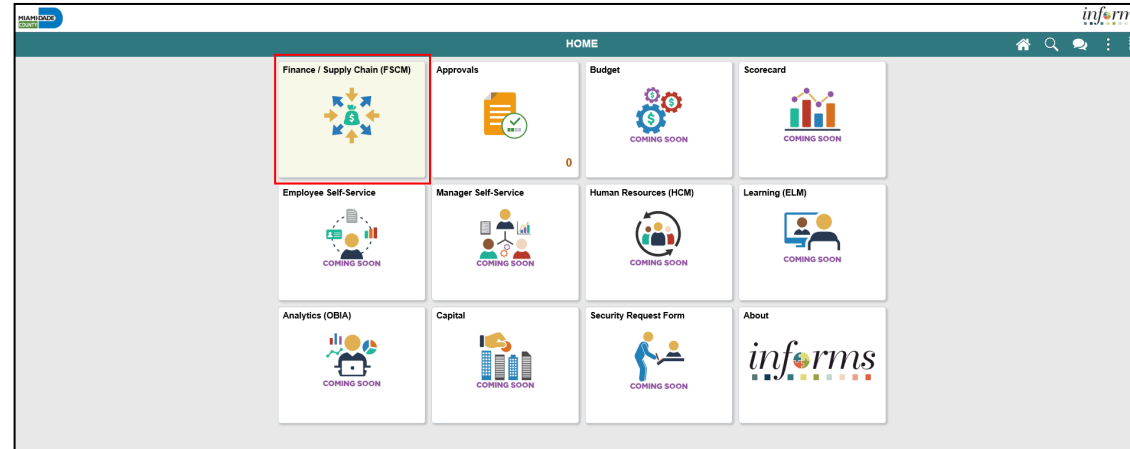
# Roles and Responsibilities

The roles and responsibilities associated with the Create, Maintain, and Reporting Process(es) include:

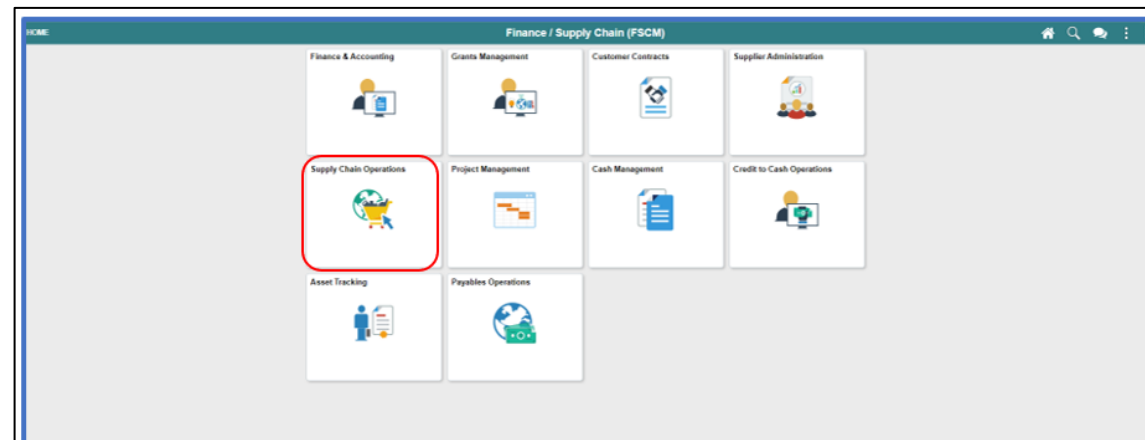
Role	Responsibilities
<b>Strategic Sourcing Buyer</b>	The Strategic Sourcing Buyer has the ability to create, analyze, and award events.
<b>Strategic Sourcing Event Approver</b>	The Strategic Sourcing Event Approver has the ability to approve or deny Events.
<b>Strategic Sourcing Event Collaborator</b>	The Strategic Sourcing Event Collaborator has the ability to collaborate on the sourcing event. Collaborators can access only events to which they have been invited to collaborate.

# Navigation

From the INFORMS homepage, select the **Finance/Supply Chain (FSCM)** tile.

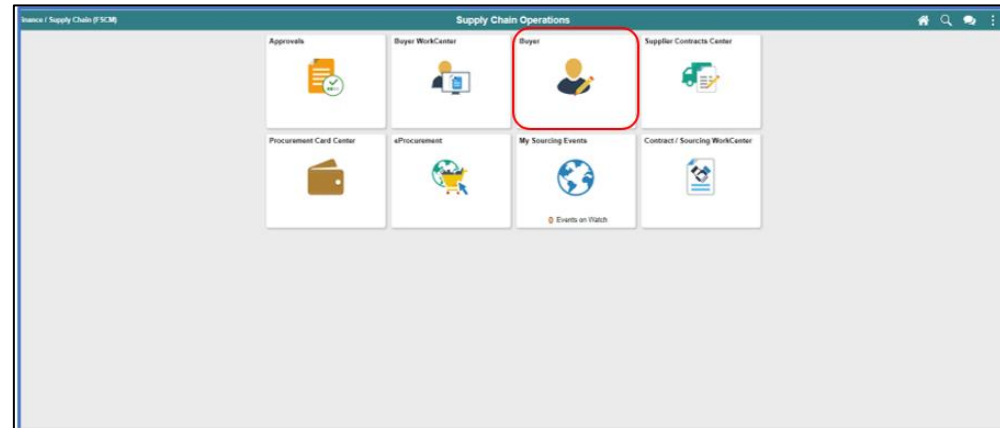


Select the **Supply Chain Operations** tile.



# Navigation

Select the **Buyer** tile.



# Key Changes to the Business Process

- Sourcing will be automated.
- Enhanced collaboration with key stakeholders
- Automated approval notifications
- Effectively track Bidder participation and results

# Key Changes to the Business Process

- Supplier Contract
  - DocuSign eSignature will be available to use to sign contract documents electronically
  - Document Collaboration functionality which includes routing documents for comments, editing online
  - Contract Administrators will have the ability to establish the transactional contract shell in Peoplesoft

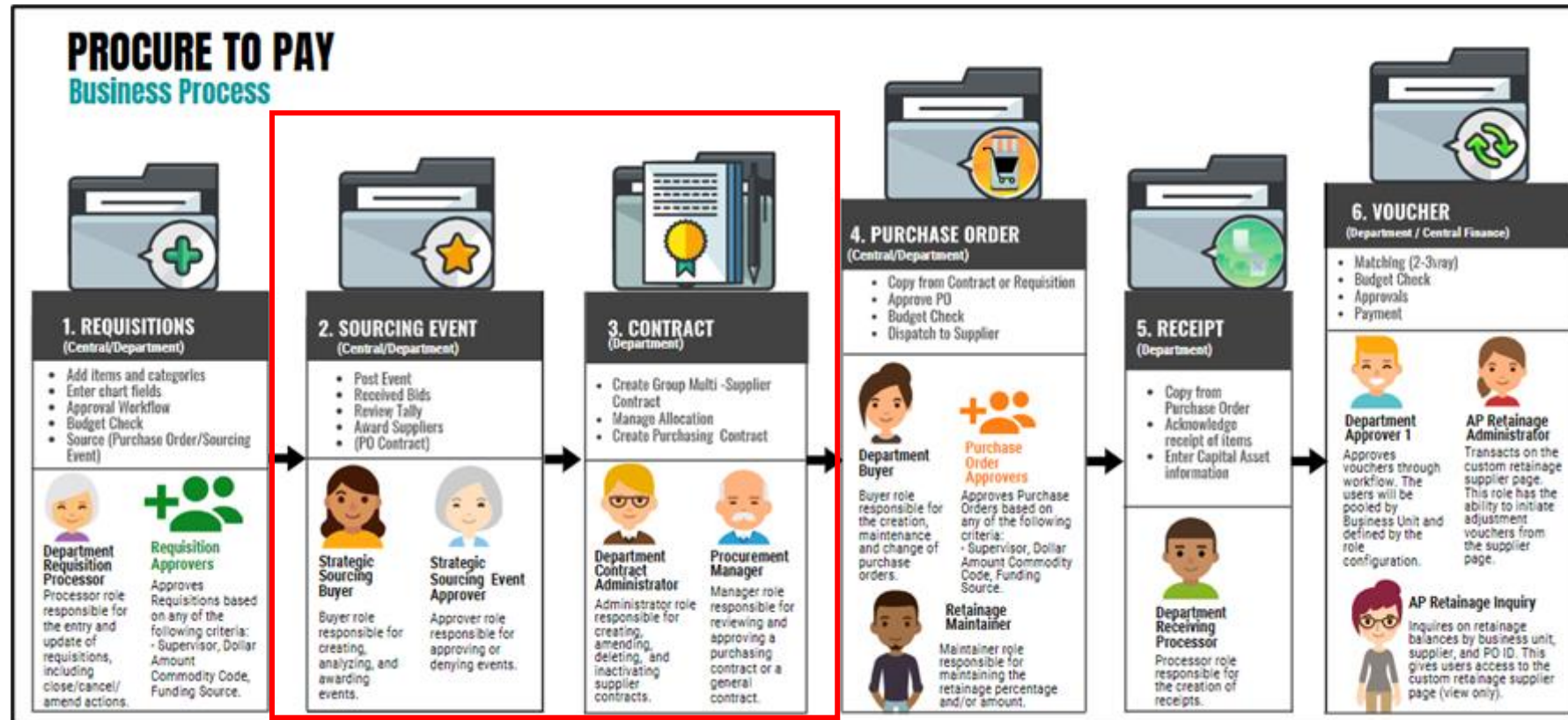
# Overview

- RFI events are used to define qualification requirements and gather requested information for evaluation and pre-qualification of bidders for inclusion in a pre-qualified Bidder Group for further competitions (RTQ, RFQ).

## **The Buyer creates an event.**

1. The Buyer can invite Strategic Sourcing Collaborators to give input to the event, reviews the input, and posts the event based on the input.
2. Bidders can register, review the event, and submit their bids.
3. The Buyer evaluates the submissions and can create another round of the event to solicit more submissions.

# The End-to-End Business Process

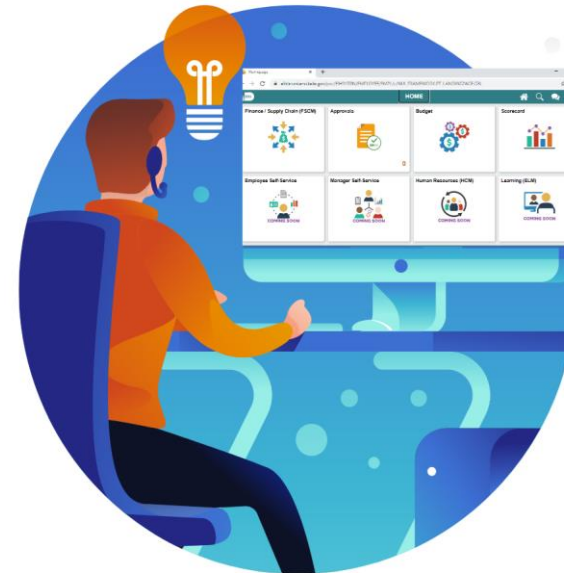


# Introduction to Activities and Exercises

Participants will take part in two types of hands-on learning throughout this course.



Training  
Activities



Training  
Exercises

# SOURCE TO CONTRACT (RFI) Business Process

This Source to Contract process covers the creation and analysis of a Request for Information (RFI) sourcing event and the creation of the Group Multi Supplier (GMS) Pool.



# Terminology Changes

ADPICS Terminology	INFORMS Terminology
Departments	Business Unit (Processing Department)
Vendor ID: FEIN / TIN (SSN)	Vendor ID: System Autogenerated Number
BidSync	Strategic Sourcing Module
RTQ/RFQ	RFI
RFP/FB	RFx
Solicitation Number	Event ID

MIAMI-DADE COUNTY informs

Supply Chain Operations Buyer New Window | Help

**Create Events**

Find an Existing Value | Keyword Search | **Add a New Value**

Business Unit: ME

Event ID: NEXT

Event Round: 1

Event Version: 1

**Event Format: RFI**

Event Type: Rfx

Proxy Bidding (Auctions Only): Disabled

**Add**

Find an Existing Value | Keyword Search | Add a New Value

100%

- Approvals
- Manage Sourcing Plans
- Create Events**
  - Event Details**
  - Maintain Event Templates
  - Bid Factor Setup
  - Bid Factor Group Setup
  - Standard Comments
  - Standard Comments Type
  - Event Collaboration
- Manage Sourcing Events
- Event Responses
- Contracts Setup
- Manage Contracts
- Purchase Orders

# Lesson 1: Key Terms

Term	Definition
<b>Preview Date</b>	The date that you can make available to potential Bidders, allowing them to review the event as well as enter and save their bids, which they can post as soon as the event starts.
<b>Start Date</b>	The date when the Bidders/Suppliers can begin to post bids for the event.
<b>Q&amp;A End Date</b>	The last date that Bidders/Suppliers can submit questions to the Strategic Sourcing Buyers.
<b>End Date</b>	The date when the bidding closes.
<b>Category Code (Commodity Code)</b>	The category code associated with the item number. Bidders or Suppliers will be searched based on the associated categorization.
<b>Send to Bidder</b>	Select to enable the Bidder to see the comment.
<b>Attached File</b>	Select the file to attach to this event.
<b>Attachment Description</b>	Enter a description (name) for the attachment.
<b>Display to Bidder</b>	Select this check box if you want this attachment to be available to Bidders.

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Supply Chain Operations Buyer New Window | Help | Personalize Page

Approvals

Manage Sourcing Plans

**Create Events**

**Event Details**

Maintain Event Templates

Bid Factor Setup

Bid Factor Group Setup

Standard Comments

Standard Comments Type

Event Collaboration

Manage Sourcing Events

Event Responses

Contracts Setup

Manage Contracts

Purchase Orders

**Create Event Details**

Create an Event

**Event Summary**

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

Event Type RFI

Event Status Open

\*Event Name Request for Information

Description

Time Zone EST

Preview Date 03/04/2021 Time 10:08AM

Start Date 03/04/2021 Time 10:08AM

Q&A End Date 03/04/2021 Time 10:08AM

End Date 03/18/2021 Time 10:08AM

Copy From

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](#)      [Payment Terms and Contact Info](#)  
[Event Comments and Attachments](#)      [Web forms and addendum files](#)

Add an RFx Document

**Step 2: Configure Event Bid Factors**  
Create line listings 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 see your event while collaborators are reviewing it.

Get Related Actions 100%

# Lesson 1: Activities and Exercises

