Course ID: SCM 204
Course: Supply Chain Management – RFx Event
Start Time: 8:35 AM

Course Overview

Course Description	This course provides a comprehensive review of the Strategic Sourcing processes. This course consists of the following modules:
	• Module 1: Course Introduction
	• Module 1: Course Introduction
	• Module 2: Creating an RFx Event
	    • Lesson 1: Create an RFx Event
	    • Lesson 2: Determine Bidders to Invite
	    • Lesson 3: Supervisor Approval
	    • Lesson 4: Submitting a Bid
	    • Lesson 5: Analyze RFx Submissions
	    • Lesson 6: Award Event
	• Module 3: Conclusion

Training Audiences	• Strategic Sourcing Buyer • Strategic Sourcing Event Approver • Strategic Sourcing Event Collaborator

MIAMI-DADE COUNTY

Course Overview

Prerequisites	• ERP 101 – Overview of INFORMS • ERP 102 – INFORMS Navigation, Reporting, & Online Help • SCM 101 – Supply Chain Fundamentals
Estimated Duration	

Course Outline

Content	
Module 1: Course Introduction	
Module 2: Creating an RFx Event	
• Lesson 1: Create an RFx Event	
• Lesson 2: Determine Bidders to Invite	
• Lesson 3: Supervisor Approval	
• Lesson 4: Submitting a Bid	
• Lesson 5: Analyze RFx Submissions	
• Lesson 6: Award Event	

Module 1: Course Introduction

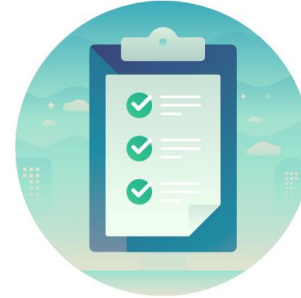| Module Topics |
|---|
| Course Administration and Logistics |
| Learning Objectives |
| Roles and Responsibilities |
| Navigation |
| Key Changes to the Business Process |
| The End-to-End Business Process |
| Introduction to Demonstrations, Activities, and Exercises |

Ground Rules

Be on time

Turn off your cell phones when in class

Participate actively in class; refrain from email and internet use

Attendance

Take breaks as needed
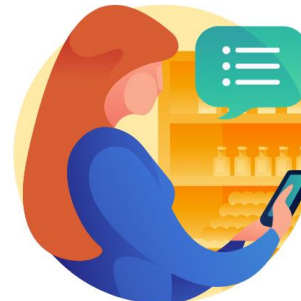
Feel free to ask questions

Learning Objectives

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

- Create an RFx Event
  - Lesson 1: Create an RFx Event
  - Lesson 2: Invite Bidders
  - Lesson 3: Supervisor Approval
  - Lesson 4: Evaluate RFx Submissions
  - Lesson 5: Award Bid

Roles and Responsibilities

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

Role	Responsibilities
Strategic Sourcing Buyer	The Strategic Sourcing Buyer has the ability to create, analyze, and award events.
Strategic Sourcing Event Approver	The Strategic Sourcing Event Approver has the ability to approve or deny Events.
Strategic Sourcing Event Collaborator	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.
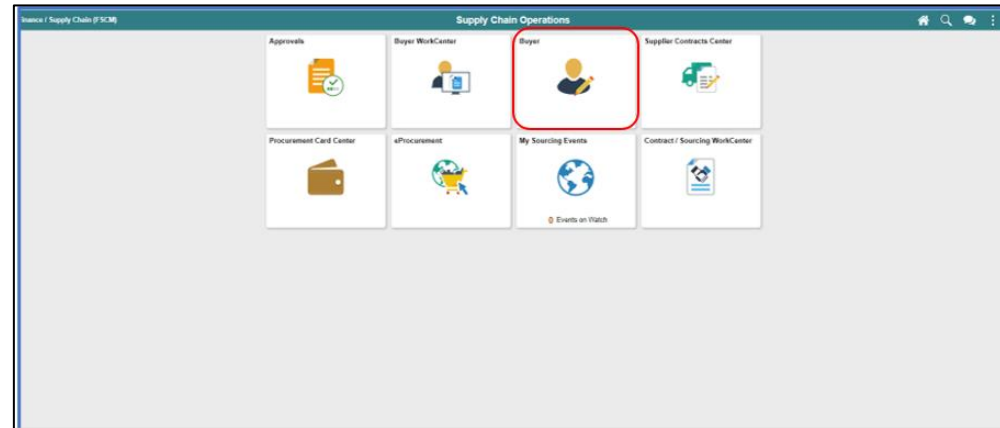

Select the **Supply Chain Operations** tile.
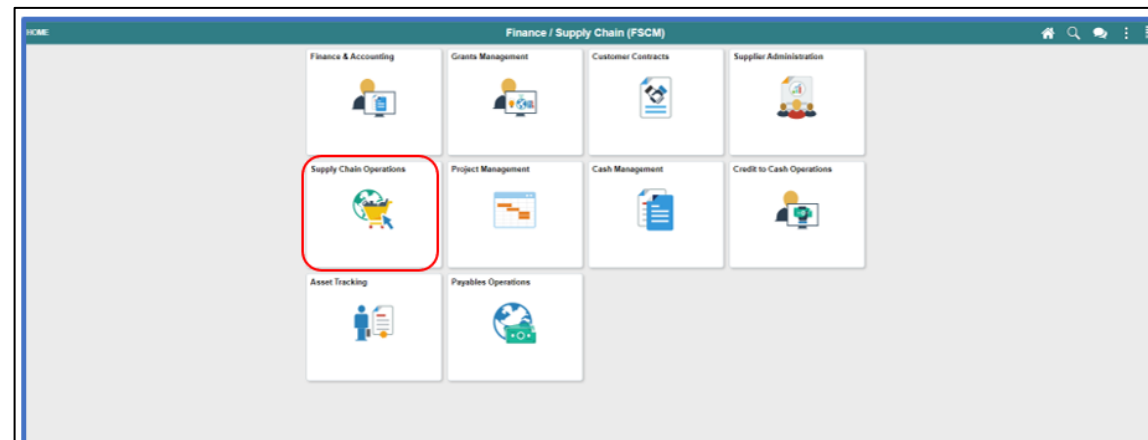
Navigation

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

- RFx events are used to gather specific information and pricing and/or proposals for evaluation and award of specific items/services/projects to specific bidders (ITB, RFP).

The buyer creates an event.

1. The Buyer can invite Strategic Sourcing Collaborators to give input to the event, review the input, and posts the event based on the input.

2. Bidders can register, review the event, and submit their bids.

3. The Buyer analyzes the bids and can create another round of the event to solicit more bids.

4. The Buyer awards the winning bid, and the system notifies the winners and non-winners.

5. The Buyer either creates a purchase order or contract to order the goods or services from the awarded Bidder.

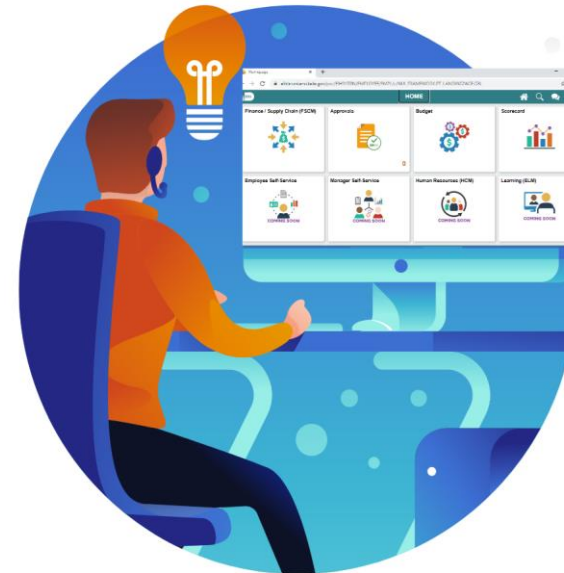# The End-to-End Business Process
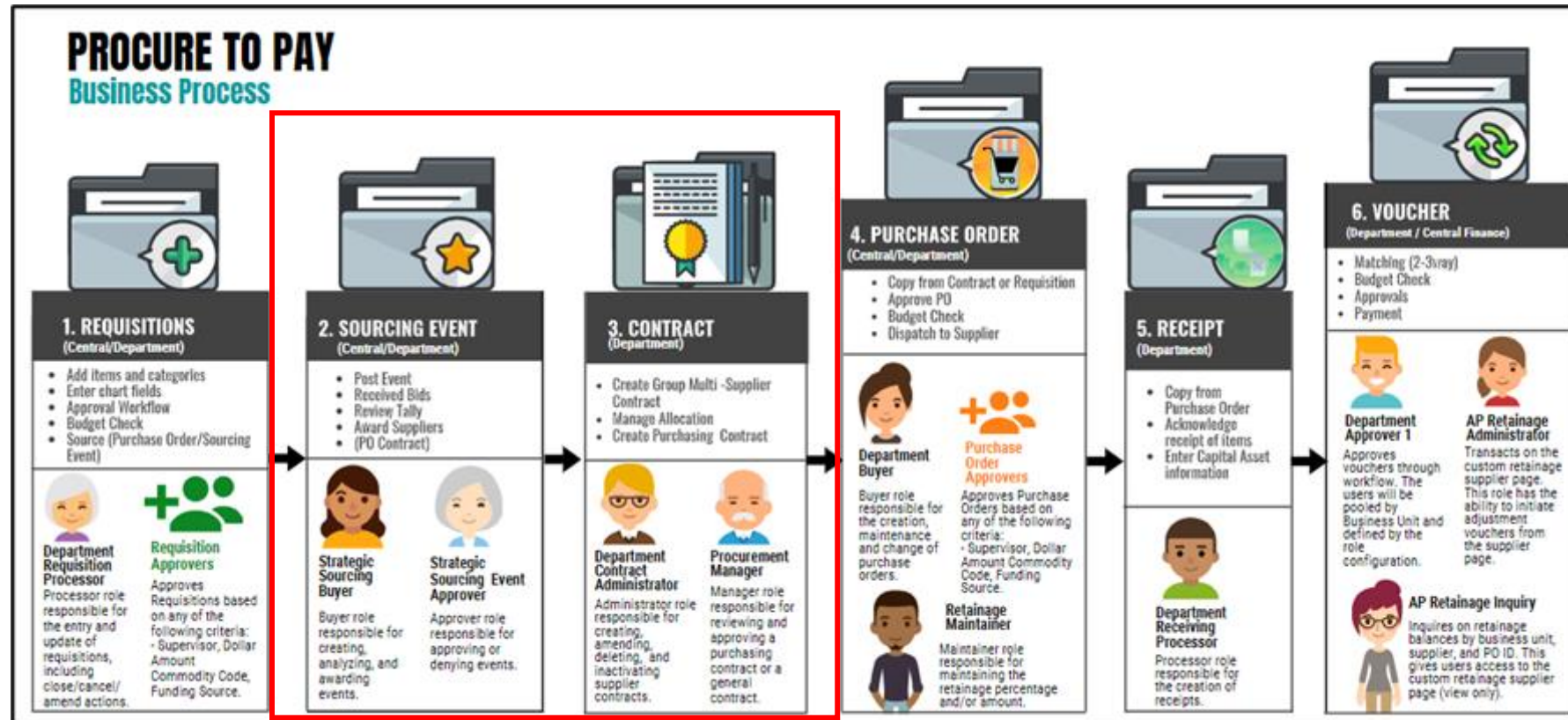
Introduction to Activities and Exercises

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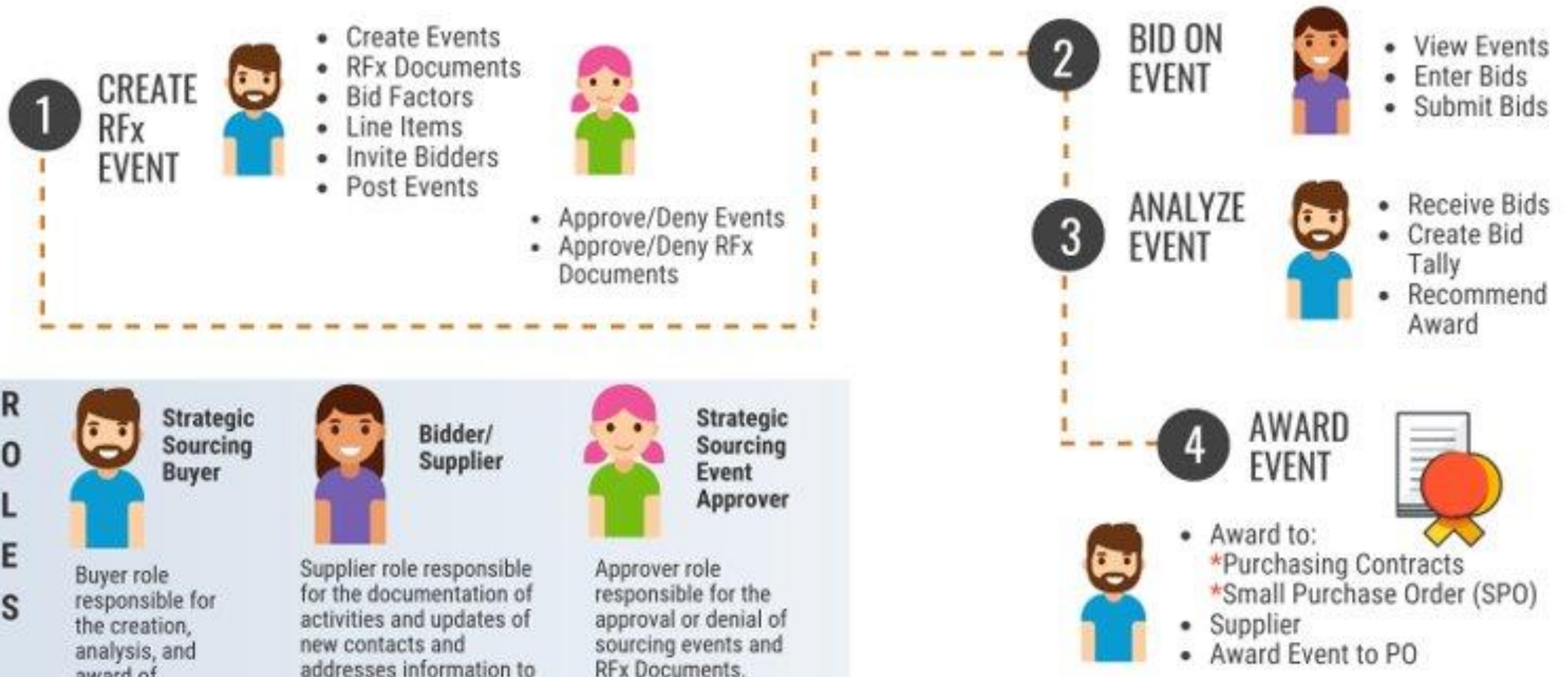
Training
Activities

Training
Exercises

DEPARTMENTAL SOURCE TO CONTRACT (RFx)
Business Process

This Source to Contract process covers the creation, analysis, and awarding of an RFx sourcing event and the creation of the Purchasing Contract.

1 CREATE RFx EVENT

- Create Events
- RFx Documents
- Bid Factors
- Line Items
- Invite Bidders
- Post Events

- Approve/Deny Events
- Approve/Deny RFx Documents

2 BID ON EVENT

- View Events
- Enter Bids
- Submit Bids

3 ANALYZE EVENT

- Receive Bids
- Create Bid Tally
- Recommend Award

4 AWARD EVENT

- Award to:
  *Purchasing Contracts
  *Small Purchase Order (SPO)
- Supplier
- Award Event to PO

ROLES

Strategic Sourcing Buyer

Buyer role responsible for the creation, analysis, and award of sourcing events.

Bidder/ Supplier

Supplier role responsible for the documentation of activities and updates of new contacts and addresses information to the supplier record after they have registered.

Strategic Sourcing Event Approver

Approver role responsible for the approval or denial of sourcing events and RFx Documents.

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

Buyer

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New Window | Help | 🖰

Create Events

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 ⌄
Requisitions ⌄
Manage Contracts ⌄
Purchase Orders ⌄
Receipts ⌄
Payments ⌄
Buyer WorkCenter

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

Business Unit   ME   🔍

Event ID   NEXT   🔍

Event Round   1

Event Version   1

Event Format   Buy   ▼

Event Type   RFx   ▼

Proxy Bidding (Auctions Only)   Disabled   ▼

Add

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

🔍 100% ▾

Lesson 1: Key Terms

Term	Definition
Preview Date	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.
Start Date	The date when the Bidders/Suppliers can begin to post bids for the event.
Q&A End Date	The last date that Bidders/Suppliers can submit questions to the Strategic Sourcing Buyers.
End Date	The date when the bidding closes.
Category Code (Commodity Code)	The category code associated with the item number. Bidders or Suppliers will be searched based on the associated categorization.
Send to Bidder	Select to enable the Bidder to see the comment.
Include on Award	Select to enable the comments to appear on the contract or purchase order award.
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.

Lesson 1: Activities and Exercises