

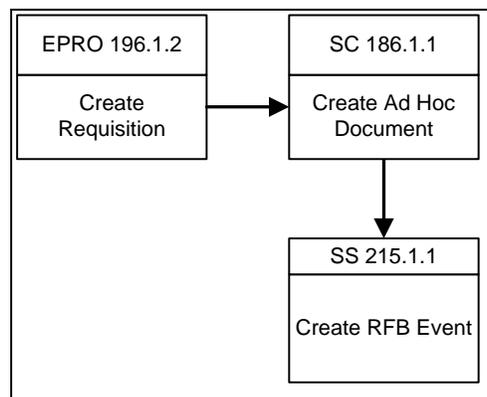
QUICK REFERENCE GUIDE

Creating an RFX event from a Requisition

April 19, 2016

Basics

There are four aspects to an Open Market Requisition (OMR) Sourcing Event. The first is to have an OMR requisition that has been approved. Second, the Ad Hoc document (Terms and Conditions) is created. Third, the Terms and Conditions document is edited based on the requirements of the Event. Last, the Sourcing Event is created by copying the lines from the OMR Requisition, attaching the Terms and Conditions document to the Event and then identifying the Event Details such as the Questions, Start Date and End Date of the Event.



Requirements

1. An OMR Requisition is created and approved.
2. User creates the Ad Hoc document (Terms and Conditions).
3. User edits the Terms and Conditions document specific to the Event and then uploads document into Swift.
4. User creates the Sourcing Event, attaches the Terms and Conditions and Posts the Event.

Create the Ad Hoc Document (Special Terms and Conditions)

NAVIGATION: *Portal Home Page • Financials Supply Chain Access • Supplier Contracts • Create Contracts and Documents • Document Management*

1. Select Source Transaction of Ad Hoc
2. Set ID is SHARE
3. Select the Document Type
4. Leave Ad Hoc ID as NEXT (System will assign the next number)
5. Enter a Description of the document
6. Click Add a Document button
7. Answer Wizard Questions
8. Click Finish
9. Click OK
10. Click Create Document button

11. Answer Wizard Questions (if applicable)
12. Click the Finish button and a Document is assigned an ID number
13. Click the Edit Document Button (another window tab will open)
14. Open MSWord Document
15. Make edits and adjustments to Word document
16. Save document to your desktop (or personal file)
17. Optional – Save as PDF document if attaching to a Sourcing Event (File name must be less than 65 characters.)

Edit a Document (Special Terms and Conditions)

NAVIGATION: *Financials Supply Chain Access • Supplier Contracts • Create Contracts and Documents • Document Management*

1. Enter Search Criteria (Contract User ID will default)
2. Click Search Button
3. Click the Document ID Link of the Document you are searching for
4. Click the Edit Document Button (another window tab will open)
5. Open MSWord Document
6. Make edits and adjustments to Word document
7. Save document to your desktop (or personal file)
8. Optional – Save as PDF document if attaching to a Sourcing Event (Filename must be less than 65 characters.)
9. Go to Document Management Windows Tab
10. Click Check In Document button
11. Select Major or Minor Version
12. Enter Comments regarding changes made to document
13. Click OK
14. Browse for document saved on desktop (or personal file)
15. Select file
16. Click Upload button

Create the Sourcing RFX Event

NAVIGATION: *Portal Home Page • Financials Supply Chain Access • Sourcing • Create Events • Event Details • Add/Update*

1. Enter the Business Unit for the Event. The BU is the 5 digit Agency number that was used when the Requisition was created.
2. Enter the Origin. The Origin should be the same Origin that was used when the OMR Requisition was created.
3. Event ID is NEXT
4. Event Format is Buy
5. Event Type is RFX
6. Click the Add button
7. Select Procurement Type
8. Select Requisition from the Copy From drop down
9. Click the Go button
10. Enter the Business Unit that was assigned to OMR Requisition

11. Select the Append option from the Copy Method
12. Enter the Requisition ID that you are copying.
13. Click the OK button
14. Click the Select All link to select all lines from Requisition
15. Click the OK button
16. Click the Return to Event Overview link
17. Select the Estimated Price to identify the estimated amount of the entire event.
18. Enter a Name for the Event
19. Enter a Description for the Event
20. Enter a Preview Date, Start Date and End Date for the event.
21. Provide the Event Settings by clicking the Event Settings and Options link
22. Provide the Payment Terms and Contact information by clicking the Payment Terms and Contact Info link
23. Provide Comments and attach the Terms and Conditions PDF document by clicking the Event Comments and Attachments link

24. Select Event Bid Factors (Questions for Vendors that pertain to the entire event) by clicking the Event Header Bid Factors link
25. Optional - Select Item Bid Factors (Questions for Vendors pertaining to specific items) by clicking the Line Items link, click the Advanced Definition tab and then click the Bid Factors link.
26. Invite the General Public and/or specific Vendors by selecting the Bidder Invitations link from the Event Summary page.
27. Click the Post button

All SWIFT Quick Reference Guides: <https://www.mn.gov/mmb/accounting/swift/training-support/reference-guides/index.jsp>