

## Editing Basic Details

The Sourcing Basic Details section is the cover sheet for the RFX, and its purpose is to add project information for both public and invited suppliers to view prior to logging into the event.

### Instructions for entering Basic Details fields

1. Type a recognizable name for your event in the **Event Name** field.
2. Provide a detailed description of your event in the **Event Description** field. This is critical for suppliers who are logging on from the public site. Details provided here will help them determine if they want to participate in the RFX.
3. Select 'Request for Proposal', 'Request for Information', or 'Request for Quotation' in the **Event Type** field.
4. You can select a currency other than the default USD currency in the **Event Currency** field.
5. Enter an estimated price or budget for the goods or services to be procured in the **Event Value** field.
6. You have the option of uploading a document that provides an overview of the sourcing event in the **Event Overview** field. Supported file formats are:
  - .doc,.docx,.df,.jpg,.jpeg,.png,.tiff.
  - Limited to file(s) of 10MB each.
  - Maximum 1 files can be uploaded.
7. Select the category (ies) that best fit your supply needs in the **Category** field. This is another critical factor needed for suppliers that are logging in from the public site. This will also help those who are looking for similar RFX across the 33 campuses
  - Use dropdown to get to 2nd level, 3rd level categories.
  - Click **Edit** to add more categories
8. In the **Business Unit** field "Procurement" is the only option.
9. Select your campus or the campus you are buying for in the **Region** field.

The screenshot shows the 'BASIC DETAILS' form with the following fields and callouts:

- 1: Event Name (001445-May2018)
- 2: Event Description
- 3: Event Type (Request for Proposal)
- 4: Event Currency (USD)
- 5: Event Value
- 6: Event Overview (with an 'X' icon for upload)
- 7: Category (IT/ TELECOM)
- 8: Business Unit (Procurement)
- 9: Region (UC Campuses)

## Tips

- Fields shaded blue are optional. They can be removed from the sourcing document you share with internal and external parties by clicking the 'X' in the upper right corner of the field.
- To redisplay a removed field (per Tip 1) click the 'Additional Field' icon in the top right corner of the Basic Details section to redisplay them.
- Request for Information (RFI): An RFI is sent to new or current suppliers to confirm their ability or willingness to fulfill the organization's requirement.
- Request for Proposal (RFP): An RFP is sent to suppliers who are found capable of fulfilling the requirement. It asks for business proposals from the suppliers and may request for additional information regarding the product or service, or the processes followed by the supplier.
- Request for Quotation (RFQ): An RFQ invites qualifying suppliers to bid for the requirement and provide price quotes.