CALUSOURCE

Collaborative Procurement

Building an RFx

Online Training Guide

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About this Training

Welcome to CalUsource: Building an RFx – Online Training

This Training Guide is intended to accompany the ***Building an RFx*** online training video located on the CalUsource website. Viewing the online training while using this guide and taking notes will help you create an RFx with confidence on the job.

How to Use the Online Training

The online training video and guide provides audio and visual guidance by systematically walking you through each section of the RFx document in the Calusource tool.

The way you use the online training depends on your need:

- **If you are using CalUsource for the first time**: Use the online training to learn everything you need to know about the creation and publication of an RFx in CalUsource.
- **If you are already using CalUsource and attended classroom training**: Use the online training to refresh your knowledge on specific sourcing event tasks as needed.

This training is designed to be self-paced based on your schedule and how you learn best. Keep in mind that rushing through the training or being distracted by competing work priorities will be counter-productive to learning.

You can complete the entire training all at once or divide it into multiple sittings. Depending on your learning style, this training will take about 45 minutes to one hour to complete. If you do it in multiple sessions, we recommend sessions of at least 15 minutes in length for maximum retention.

About this Guide

Each main topic (blue headings) in this guide corresponds to a section of the “Building an RFX” online training. This guide includes one or more screenshots of each section of the CalUsource sourcing tool, defines key fields, and provides steps for the completion of sourcing document authoring tasks. It also contains links to Quick Reference Guides for detailed instructions on completing specific tasks.

How to Use this Guide

- **As a point of reference while viewing the online training:** Print out this guide and follow along with the online training, taking notes as needed to help you remember key points.
- **As just-in-time support when creating an RFx:** Refer to this guide whenever you need basic instructions for completing RFx authoring tasks.

Learning Objectives

Upon completing this training you should be able to:

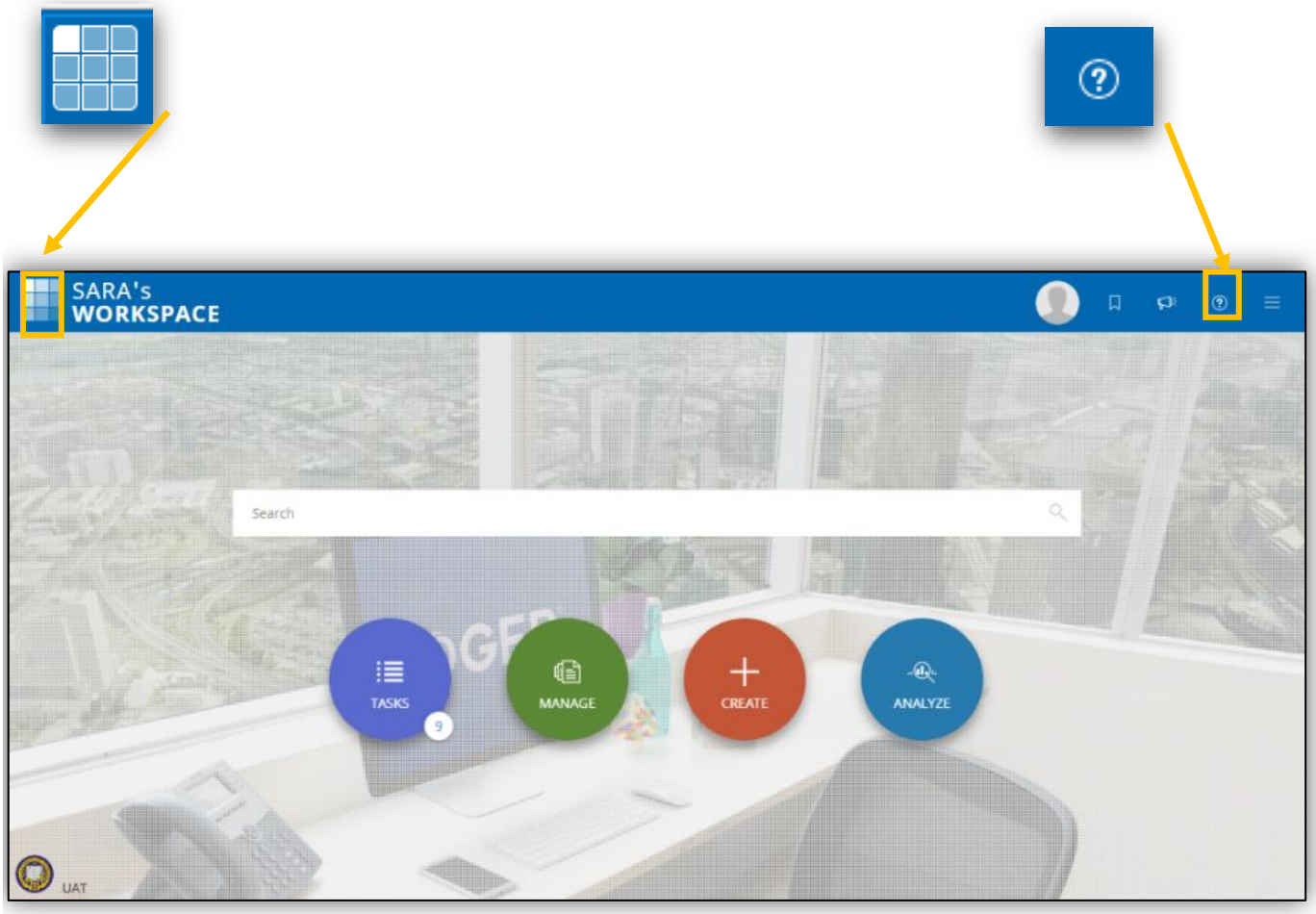
- Author an RFx document, including cover sheet, bidding guidelines, supplier and team member invitations and attachments.
- Create a questionnaire.
- Create a pricing sheet.
- Publish an RFx.

Basic System Functionality, Navigation and RFx icons

CalUsource has an intuitive, user-friendly interface. Once you familiarize yourself with a few key features you should be able to navigate the application easily.

Key Fields

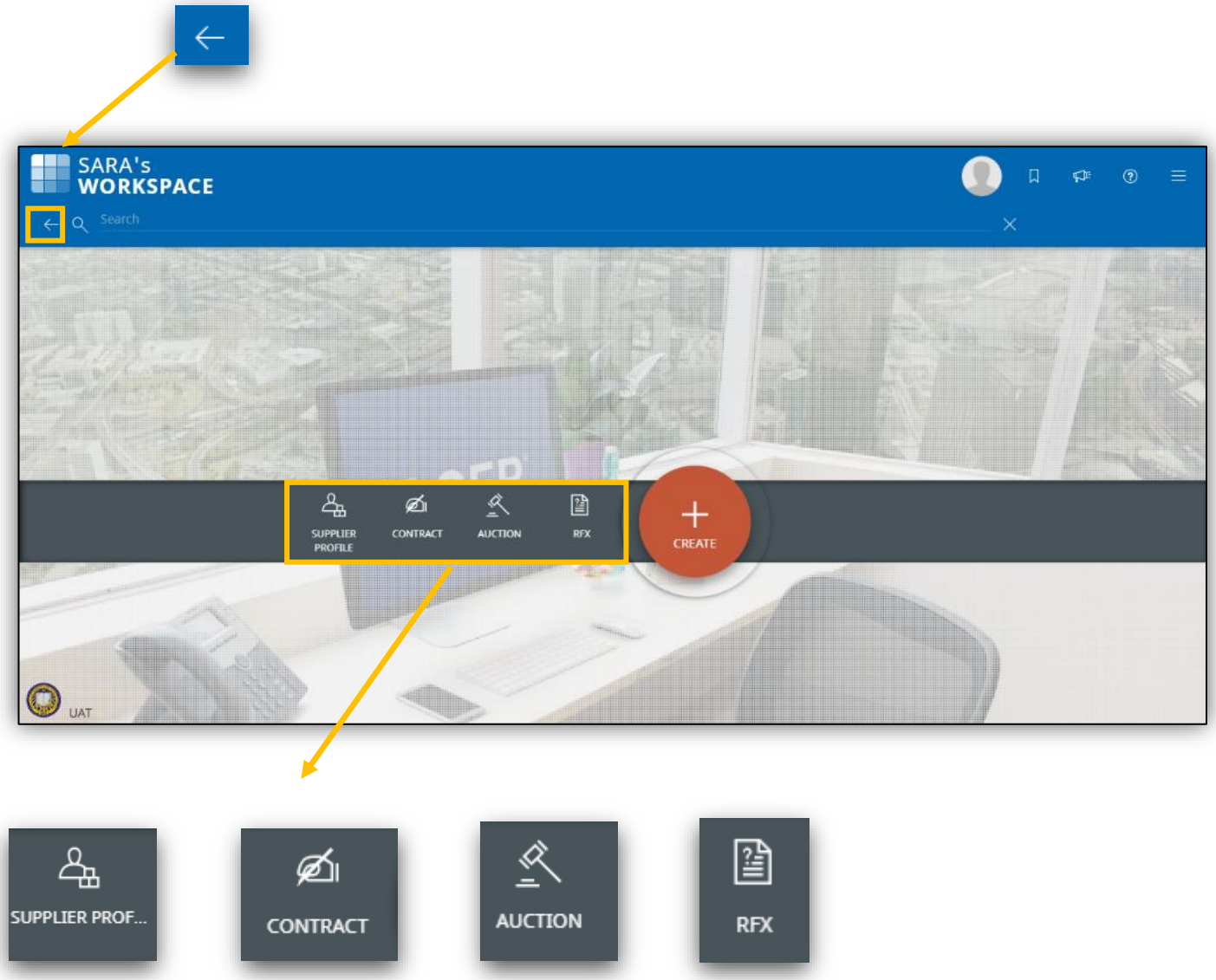
- **Home Button:** (9 squares in upper left corner) Displays Home Screen
- **Help Icon**: Provides support contact information as well as access to guides and videos.
- **Main Menu Buttons:** Provide access to key CalUsource functions.
  - ☐ **Tasks:** displays a list of items assigned to you.
  - ☐ **Manage:** displays CalUsource documents for review, categorized by document type.
  - ☐ **Create:** leads to creating supplier profiles, contracts, auctions and RFx documents.
  - ☐ **Analyze:** routes to system-wide spend data and reports.
- **Search Bar:** Use to search throughout CalUsource for all instances of your search term.



Create Menu

The Create Menu is where you will create your RFx as well as other CalUsource documents.

- **Back Arrow:** Redisplays the previous screen. (On all screens but the Main Menu.)

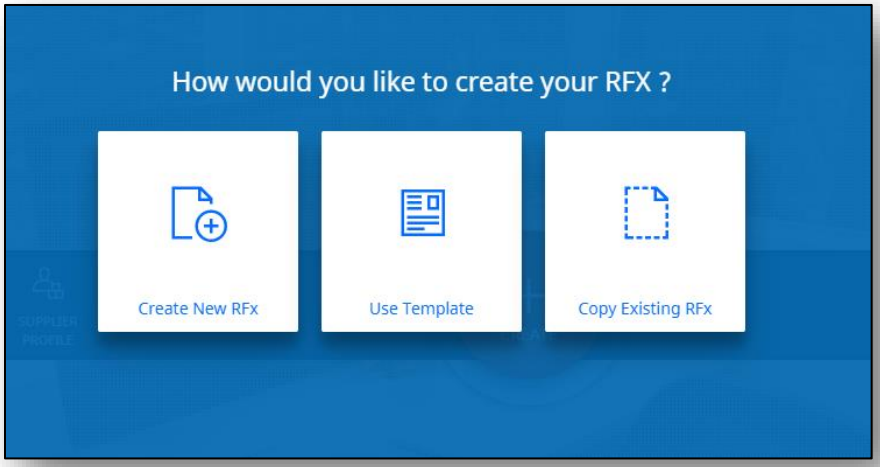


Creating an RFx

When you select **RFX** from the CalUsource **Create** menu you are presented with three options *(listed in Key Fields below)*.

Key Fields

- **Create New RFx:** This option opens a completely new RFx, allowing you to build an RFx from scratch.
- **Use Template:** This option creates an RFx from an existing template. If your campus has a preference for how an RFx is structured, please check to see if a template has been developed for that purpose. *(**Note:** RFx templates have not yet been loaded into CalUsource as of publication of this guide.)*
- **Copy Existing RFx:** This option copies a previously created RFx with all that information now contained in the new RFx. This option is useful if your new RFx is similar enough to the copied RFx to require minimal rework.



Create a New RFx:

1. Click **Create** from the Main Menu.

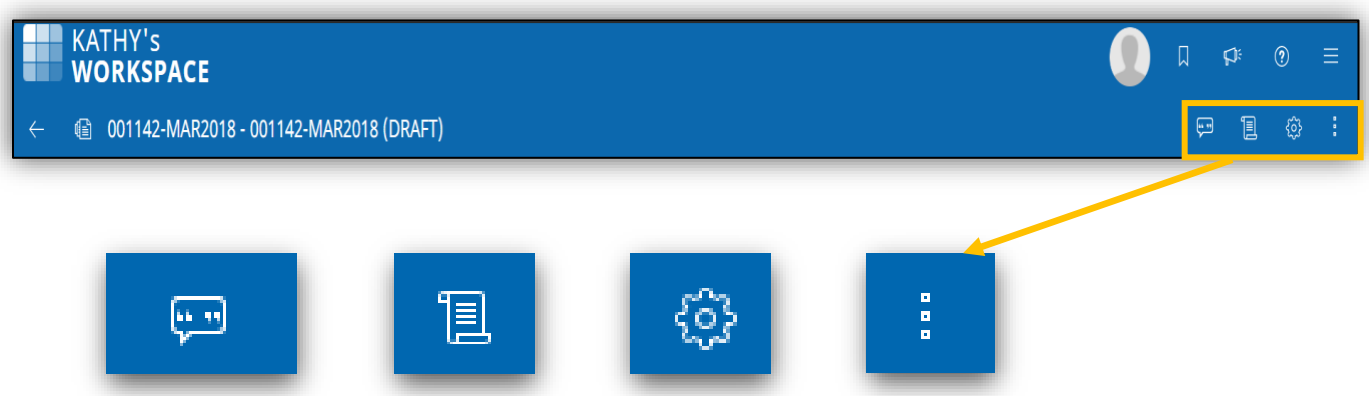
   ☐ Click **RFX** from the Create Menu.
   ☐ Click **Create New RFx** to open a blank RFX document.

RFx Icons

Become familiar with the icons in the second row of the RFx module's title banner as you will need to access them throughout the process of building an RFx.

Key Fields *(listed from left to right as displayed on the screen)*

- **Discussion Forum icon:** Provides the ability to communicate with your vendors and team members about RFx event-related topics.
- **Download Log icon:** Allows you to review the log of changes that have occurred throughout the event.
- **Settings icon:** Allows you to modify the way team members and supplier view and interact with the project.
- **Actions icon:** Provides context sensitive options such as deleting the event, downloading a summary of the event and emailing, creating a scorecard, viewing the audit log, and other actions depending on where you are in the RFx document.

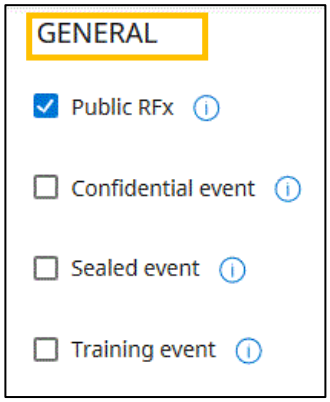


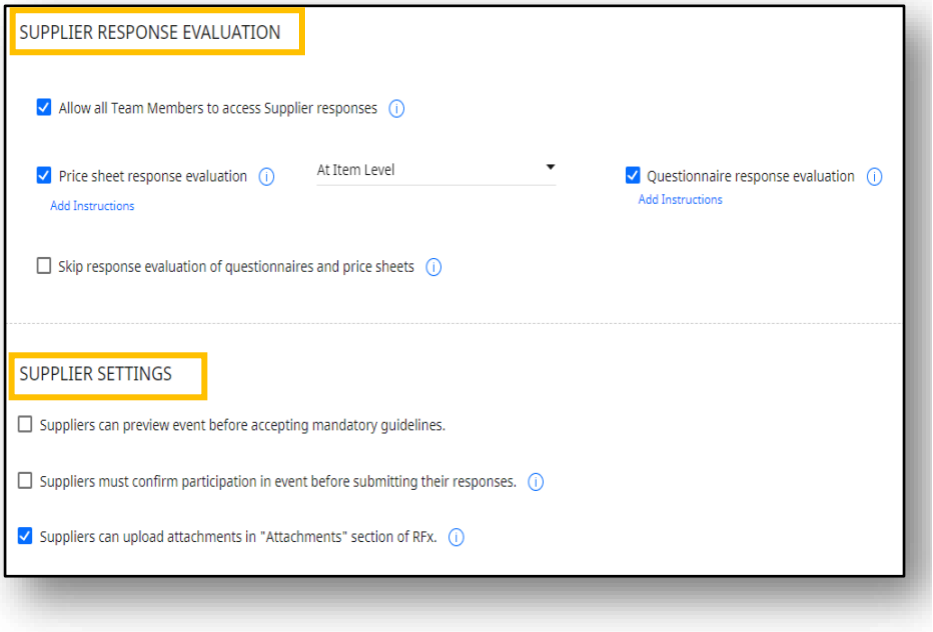
Configuring RFx Document Settings

The **Settings icon** has three sections corresponding to the three different settings options: General, Supplier Response Evaluation, and Supplier Settings.

Key Fields

- **General Settings:** defines the type of event – Public, Confidential, Sealed, Training.
- **Supplier Response Evaluation:** offers options for supplier responses in Price Sheets and Questionnaires.
- **Supplier Settings:** defines what suppliers can see and do in the RFx event.





For additional information, see the Configuring Event Settings QRG.

Configure RFx Document Settings:

1. Click the **Settings icon** in the upper right of the Create New RFX screen.
2. Check the box under **General** that best represents how you want the event to be viewed/used.
3. Check the box(es) under **Supplier Response Evaluation** to define the portions of the supplier response evaluators will review.

   Recommendation: *Uncheck* **Allow all Team Members to access Supplier responses** – this will prevent evaluators from seeing Questionnaires and Price sheets to which they are not assigned.

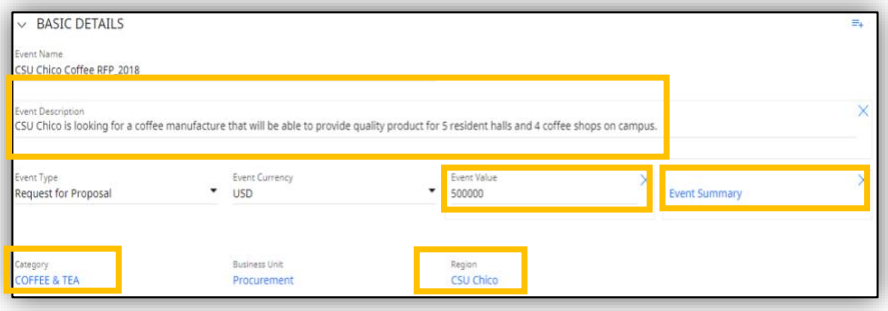
   Recommendation: *Uncheck* **Price sheet response evaluation** if you do not intend to use a Price Sheet in the tool.
4. Check the **Supplier Settings** boxes to define what you want suppliers to do and see.
5. Click **Done**.

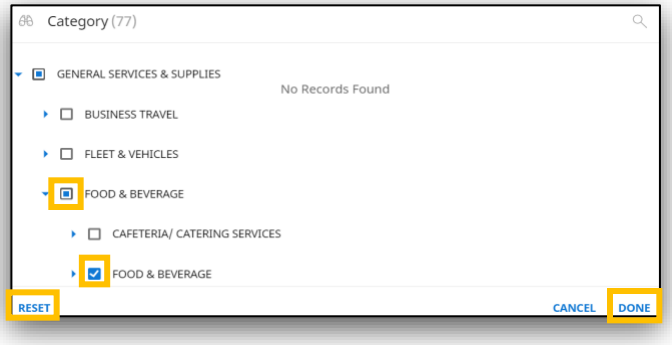
Completing the RFx Basic Section

The **Basic Details** section serves as the cover sheet for your RFx. This section provides basic event information about your RFx for potential suppliers to view prior to logging into the event.

Key Fields

- **Category:** Select the category that best represents the products/services this RFx is sourcing.
- **Event Value:** Provide the baseline value of your RFx event (suppliers cannot view this field).
- **Event Summary:** Upload your RFx event information or Statement of Work (SOW) here.
- **Region:** Select the campus(es) that are involved with this RFx.





For additional information, see the Editing Basic Details QRG.

Complete the RFX Basic Details section:

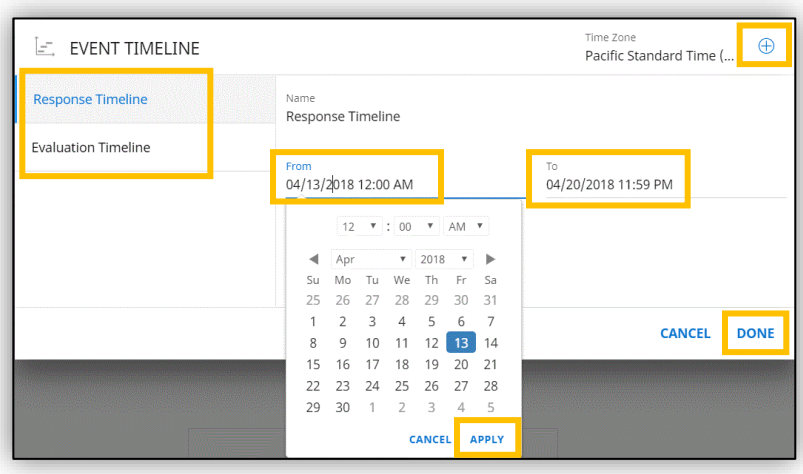
1. In the **Event Name** field, use this naming convention: RFx Type, Brief Description (1-3 words), and Region. (*Example:* RFP_Student Dental Health_UC Campuses)
2. In the **Event Description** field, add a more detailed summary of your event.
3. In the **Event Value** field, enter a dollar amount.
4. If needed, click **Edit** to change the category from the default setting**.**
   - ☐ Uncheck the default category.
   - ☐ Click the down arrow as needed to find the most appropriate category.
   - ☐ identify and check the appropriate category.
   - ☐ Click **Done.**
5. Leave **Procurement** as the **Business Unit.**
6. Change **Region** to the location(s)/campus(es) associated with your event.
7. Click **Done**.

Modifying and/or Adding Event Timelines

The **Event Timeline** section allows you to define the time periods within which different RFx processes will be started and completed.

Key Fields

- **Response Timeline:** Sets the time period during which suppliers must submit their responses to the RFx (This should include time for supplier to ask questions once they have accepted the guidelines).
- **Evaluation Timeline:** Sets the time period during which you and your evaluation team will compare and evaluate supplier responses.



For additional information, see the [Editing/Adding Event Timelines QRG](#).

Modify an Event Timeline:

1. Click the **Plus icon** in the upper right of the **Timeline** section.
   - ☐ You can also click once on the timeline to open that section to edit.
2. Click the Timeline you wish to modify on the left side of screen.
3. Click on the date/time in the **From** and **To** field dates (From/To dates changed separately).
4. Change the date and time in the calendar that displays.
5. Click **Apply** in the Calendar to save each date/time.
6. When you have finished changing **From** and **To** dates/times, click **Done**.

Add a New Timeline:

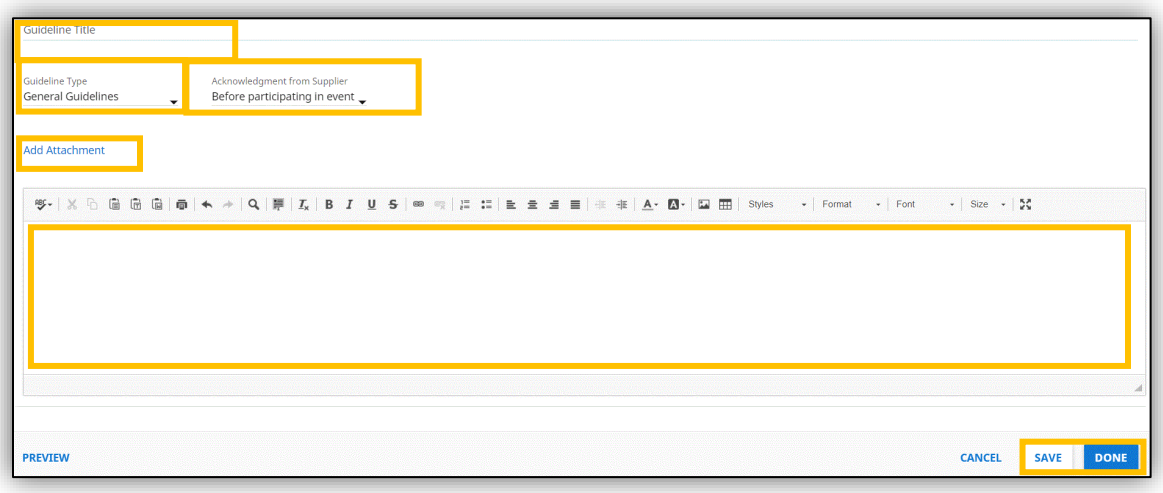
1. Click the **Plus icon** in the upper right of the **Timeline** section.
2. Click the **Plus icon** in the **Event Timeline** pop-up.
3. Enter your new timeline name in the **New Timeline** field.
4. Click the checkmark.
   - ☐ The New Timeline will show in the list on the left.
7. Click on the date/time in the **From** and **To** field dates (From/To dates changed separately).
5. Change the date and time in the calendar that displays.
6. Click **Apply** in the Calendar to save each date/time of your new timeline.
7. When you have completed both **From** and **To** dates/times, click **Done**.

Adding Guidelines

Guidelines are conditions to which suppliers must agree before entering the RFx. There are two ways to add guidelines: 1) selecting pre-approved guidelines from the Guideline Repository of your university system; 2) creating new guidelines from scratch. *(This page describes creating a guideline from scratch. The next page describes using the Guideline Repository.)*

Key Fields

- **Create from Repository:** Use this option to select pre-approved guidelines including: Supplier Qualification, Terms and Conditions, and Bidding Qualifications, depending on your system. *(See next page for instructions on importing from repository.)*
- **Create New Guidelines:** Use this option to create your own guideline(s) for an event.
- **Guideline Title**: If creating new guidelines, use this field to give your guideline a title that is easy for suppliers to understand.
- **Acknowledgement from Supplier**: Check "Before participating in event" to require supplier acknowledgement of the guideline prior to their participation in the event.
- **Add attachment**: Use this field to upload a guideline document to your RFx.



For additional information, see the Adding Guidelines QRG.

Add New Guidelines:

1. Click **Create New Guideline**.
2. Enter a clear and easy to understand title in the **Guideline Title** field.
3. Select the **Guideline Type** from the dropdown menu.
4. In the **Acknowledgement from Supplier** field, select your preference for when suppliers are required to agree to the guideline(s).
5. Describe your guideline in the **text box**. You can also link to a document from a text box.
6. Click **Add Attachment** to upload a document that will be used as a guideline and click **Close**.
7. Click **Save** to save your changes.
8. Click **Done** to include your new guideline in the RFx document.

Importing Guidelines from the Repository

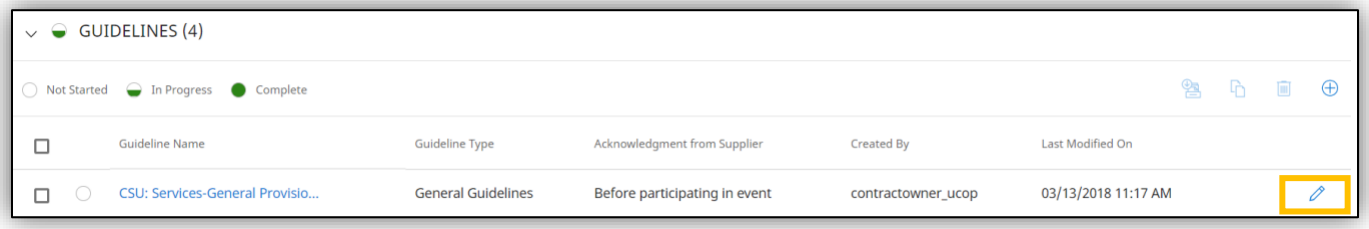
Your system or campus may provide you with approved guidelines (such as Supplier Qualifications, Terms and Conditions, and Bidding Qualifications) to use in your RFx events in the Guidelines Repository.

Import Guidelines from the Repository:

1. Click **Import from Repository**.
2. Check the box(es) of which document(s) you wish to include in your event.
3. If needed, use Search or Filter in the blue section in the top right corner of the page to narrow the list of guideline documents that display.
4. Click **Import**.

Modify a Guideline:

You may wish to modify or edit the text of an imported guideline to reflect the specific needs of your event. You can also make changes to a guideline you created at any point prior to publishing the event.



1. In the **Guidelines** section, click the **Pencil icon** of the guideline you wish to edit.
2. Make changes to the item (e.g. change the **Guideline Type,** edit the document text, add attachments, or make a change in supplier acknowledgement.)
3. Click **Save**
4. Click **Done.**

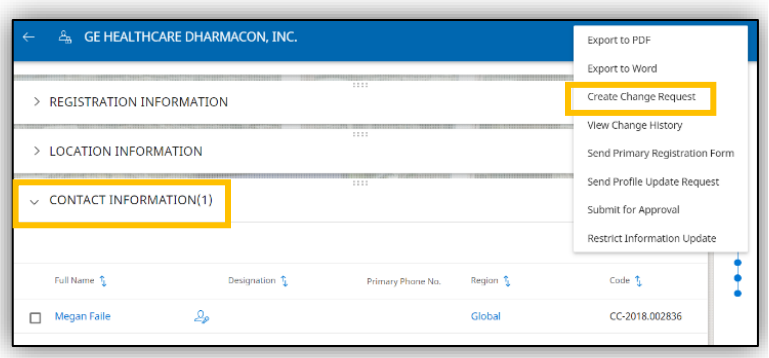
Adding Suppliers and Supplier Contacts

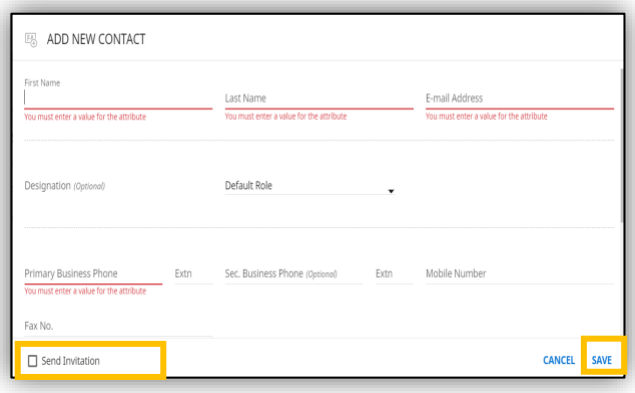
You must add all suppliers you intend to invite to your RFx in the Supplier section. To prevent creating duplicate profiles for the same supplier, first check the CalUsource Supplier Repository to see if the company you are adding is already listed. *(Best practice is do this prior to creating the RFx event.)*

Only add a new supplier if you are SURE your supplier is not already listed in the Repository. When adding a supplier from the Repository, confirm that your event contact is listed in the company's profile; if not, add your contact to that profile. If the supplier is already in Approved or Normalized status, you will need to create a change request to add a new contact. Once the change request is submitted, you will need to click **Send Invitation** icon again.

Key Fields

- **Contact Information section:** Displays all company representatives in CalUsource.
- **Send Invitation**: When checked, sends the contact an email directing them to create a CalUsource profile.





For additional information, see the Adding a New Supplier Contact QRG.

Add Suppliers and Supplier Contacts:

1. From the Supplier section, click **Add from Repository** to display the Repository of suppliers (*recommended*).
   - ☐ Alternately, click **Manage** from Main Menu, then **Show All** under the **Supplier** card.
2. Use the search or filter to locate the correct Supplier Company Record in the repository.
   - ☐ If the Supplier Profile does not exist in the Supplier Repository, you will need to create a new profile. (See *Create a New Supplier Profile* below.)
3. Click on the company name in the RFx Supplier section to display their Supplier Profile.
4. Open the **Contact Information** section of the Supplier Profile to see if your contact is listed.

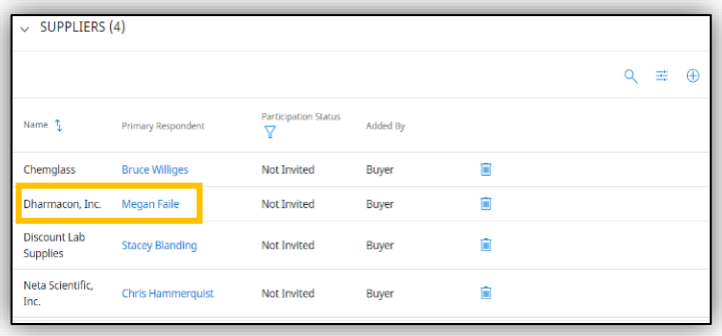
5. If your contact is not listed and your Supplier's status is Approved or Normalized:
   - ☐ Open the **Action icon.**
   - ☐ Click **Create Change Request.**
   - ☐ Redisplay the **Contact Information** section.
   - ☐ Click the **Plus icon** to display the **Add New Contact** window**.**
   - ☐ Complete the fields in the **Add New Contact** window with your contact's details**.**
   - ☐ Check **Send Invitation**
   - ☐ Click **Submit.**
   - ☐ Click **Close** in the confirmation window to redisplay the Supplier Repository.
   - ☐ Note: Invitations to Normalized and Approved suppliers are not automatically sent. Once the change order is completed (check this in the change history), the user must go back to the contact that was added and send the invitation again. This will generate an email directing them to create a CalUsource profile.
7. If your contact is not listed in the **Contact Information** section and your Supplier's status is Invited, Registered or Identified:
   - ☐ Click the **Plus icon** to display the **Add New Contact** window**.**
   - ☐ Complete the fields in the **Add New Contact** window with your contact's details**.**
   - ☐ Check **Send Invitation** to send your contact an email directing them to create a CalUsource profile.
   - ☐ Click **Submit.**
   - ☐ Click **Close** in the confirmation window.

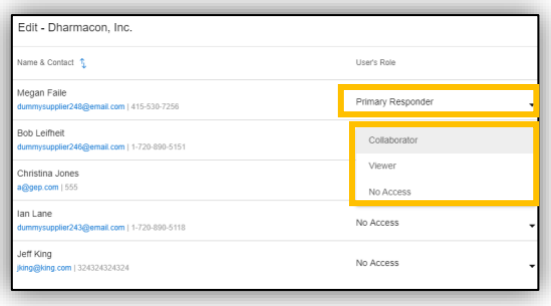
Changing Supplier Contact Roles/Primary Respondent

After you have added your supplier contact to a Supplier Profile (see ***Check for Suppliers and Supplier Contacts*** above), you will need to designate this contact as a **Primary Respondent** to have them act as a main contact for your event.

Key Fields

- **Primary Respondent:** Is the designated supplier contact specifically for this RFx event.





Change Supplier Contact Roles/Primary Respondent:

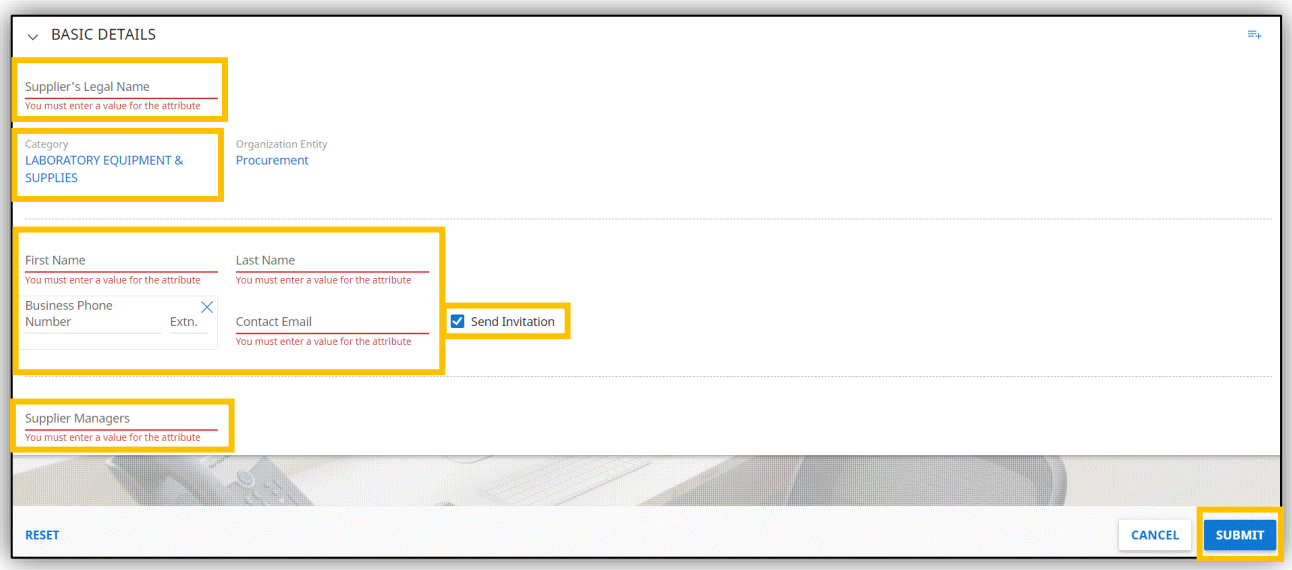
1. Display the **Supplier** section of the RFx.
2. Click on the **Primary Respondent** name that currently displays for the supplier.
   - ☐ A list of all supplier contacts will display, along with their assigned role for this event.
3. Change the role of any contact using the dropdown arrow in the **User Role** column.
   - ☐ To change the **Primary Responder** to another contact, you must first reassign the current **Primary Responder** to a new role because there can only be contact in this role per event. (All other roles can be assigned to multiple contacts.)
4. Click **Done.**
   - ☐ If you have changed the Primary Responder, check that this contact displays as the **Primary Respondent** for your event in the **Supplier** section.

Creating a New Supplier Profile

If you have thoroughly checked the Repository and have found that a supplier is not in the system, you should add that supplier into CalUsource.

Key Fields

- **Supplier Legal Name:** The Company's official name.
- **Category:** The product/service category that best describes what that company supplies.
- **First Name and Last Name:** The name of your event's Primary Respondent (contact).
- **Send Invitation:** Send an invitation to the contact to be entered in the CalUsource system.



For additional information, see the Inviting New Suppliers QRG.

Create a New Supplier:

1. Click the **Plus icon** in the **Supplier** section.
2. In the **New Supplier** screen fill in the **Basic Details**.
   - ☐ Enter the company's official name in the **Suppliers Legal Name** field.
   - ☐ Select the product or service category that describes what is supplied by the survivor in the **Category** field**.**
   - ☐ Enter the name of the primary respondent in the **First Name** and **Last Name** field.
   - ☐ Enter the supplier's phone number in the **Business Phone number** field.
   - ☐ Enter the primary respondent's email in the **Contact Email** field**.**
   - ☐ Enter the name of the primary internal (UC, CSU) person responsible for the supplier's relationship in the **Supplier Managers** field. (Typically the RFx document author).
3. Check the **Send Invitation** box.
4. Click **Submit**.

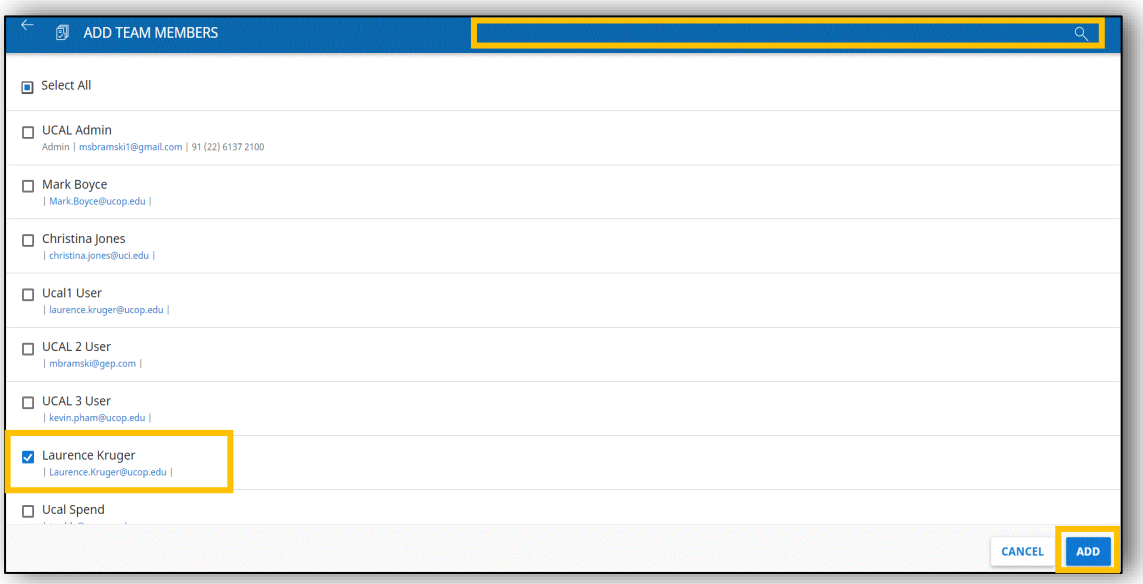
Note: You can also create a new supplier profile from the Main Menu by clicking **CREATE** and then clicking **SUPPLIER PROFILE** from the Create screen. Then, follow steps 2 through 4 above.

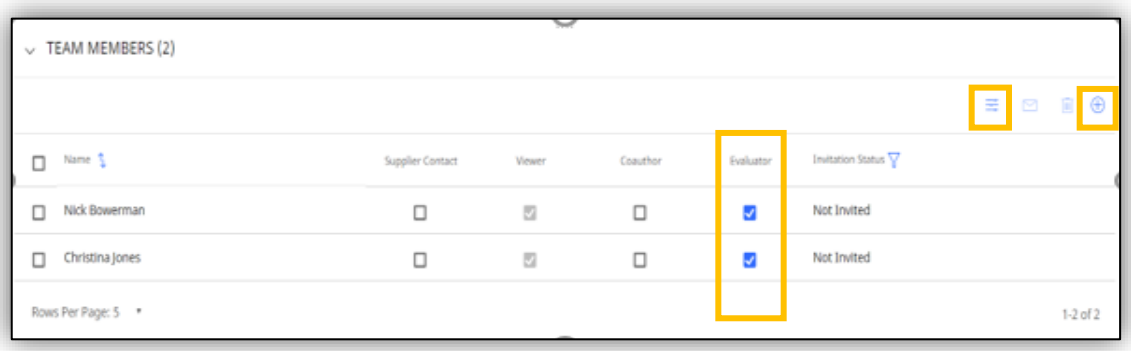
Adding and Designating Team Members

The RFx Team Members section enables you to add staff to an event and configure their role so that they can view, edit or approve the event and evaluate supplier responses, as needed.

Key Fields

- **Viewer**: Can only view the RFx. (This is the default role for all new event team members.)
- **Supplier Contact**: Has the ability to talk with suppliers in the Discussion Forum.
- **Co-Author**: Can make edits to the RFx but cannot talk to suppliers in the Discussion Forum.
- **Evaluator**: Has the ability to view and score supplier responses.





Add and Designate Team Members:

1. In the **Team Members** section of the RFx, click **Add from Repository.**
2. Click **Search** and type the name of the Team Member you want to add and press Enter.
3. Check the box of the Team Member(s) you want to add to the event.
   Note: If a team member is not in the repository, email CalUsupport to get them added. You will need to provide their name, email, phone and position.
4. **Click Add** to add Team Member(s).
5. Navigate back to the **Team Members** section of the RFx**.**

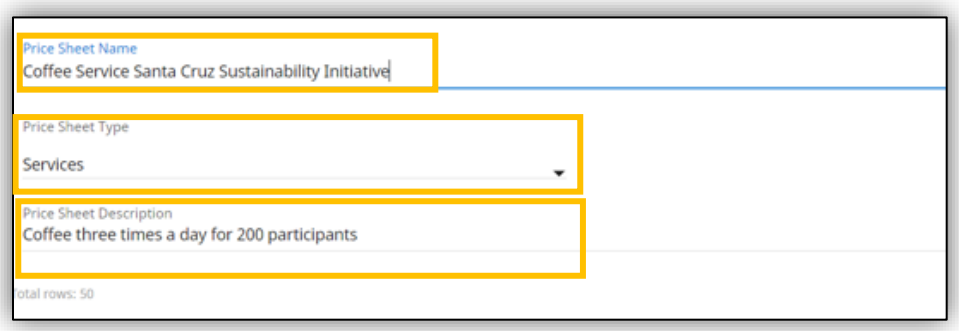
6. Use the check boxes to designate team members as Evaluator, Coauthor, and/or Supplier Contact. (A team member can have more than one role in an event.)
7. Click the **View Configuration** icon (three line icon next to Email icon) to select specific documents for co-authoring and evaluation rights as assigned to team members.
8. Click **Co-Authoring** or **Scoring** to assign documents to team members. (If necessary, uncheck documents for which you do not want to grant privileges.)
9. Click **Save** and **Done**.
10. Check the box to the left of the Team Member names. Click the **Email icon** to invite those Team Members to participate in an RFx event after it has been published.

Creating / Editing a New Pricing Sheet

Price Sheets enable you to create specific pricing details for your suppliers to respond to in their bid (i.e. item name, description, unit of measurement, price, etc.). You can create a new price sheet or use an existing Price Sheet imported from the repository. An RFx event can have one or more price sheets.

Key Fields

- **Price Sheet Type**: Select either Materials or Services.
- **Price Sheet Description**: Provide a concise description of information suppliers should include in their price sheets.



For additional information, see the Adding New Price Sheets QRG.

Create New Price Sheet:

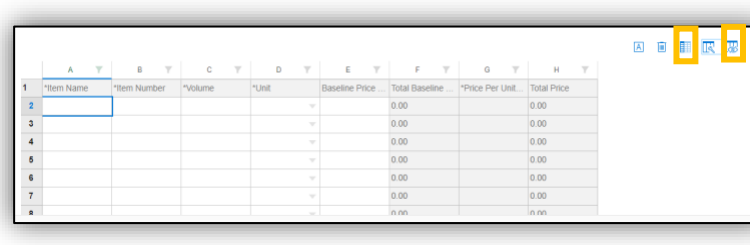
5. Click on **Create New Price Sheet** in the **Price Sheets** section of the RFx event.
6. Enter a brief descriptive name of the items on which you want suppliers to provide pricing in the **Price Sheet Name** field.
7. Provide a more detailed explanation of what you are asking the suppliers to provide in their price sheet in the **Price Sheet Description** field.
8. Select **Materials** or **Services** in the **Price Sheet Type** field.
   - ☐ Warning: Do not switch **Price Sheet Type** after pricing entry or you will lose your work.
9. Click **Save.**
   - ☐ Warning: You must create a **Price Sheet Name** before saving the event.

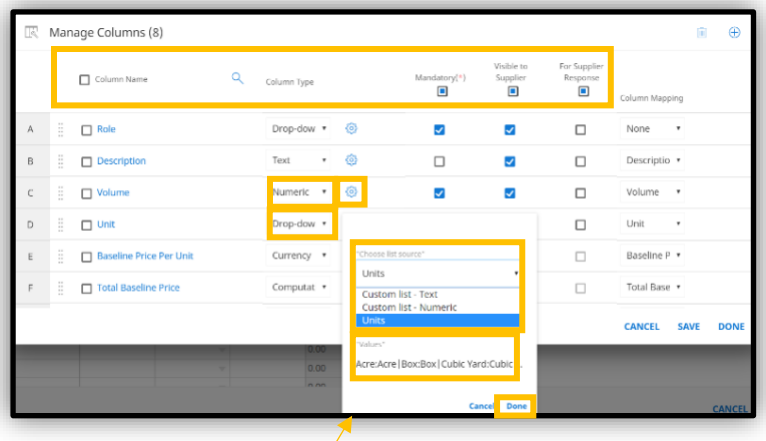
Managing Price Sheet Columns

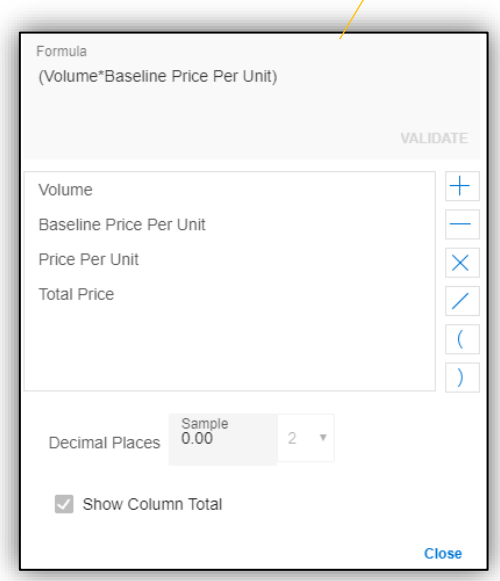
Before you list price sheet items, you may need to change the way the Price Sheet displays columns, including the column name, the type of information displayed in the columns, etc.

Key Fields

- **Column Type:** Defines the type of information that can be entered in the column.
- **Column Mapping:** Allows you to map the Total Baseline Price and Total Price columns to existing data in the RFx. This means you can create your own baseline price or total price columns and map them to the standard Total Baseline Price and Total Price columns respectively, and the values will populate accordingly.







Manage Price Sheet Columns:

1. Click on the **Manage Column icon** (wrench icon).
2. To change the **Column Name**, click on the name in the **Column Name** field and edit the name in the text box.
3. To change the **Column Type**, click the dropdown arrow and select the appropriate type from the menu.
   - ☐ If you select **Dropdown List** as a Column Type**:**
     - Click the **Dropdown Setting** icon that displays to the right of the **Column Type** column.
     - In the dropdown list:
       - Select **Units**, OR
       - Create a custom dropdown list by selecting **Custom list: Text** or **Custom list – Numeric**.
         - Type each list item of your custom dropdown list in the **Values** field.
         - Place an "I" between each list item (see screen shot above).
         - Click **Done** to save your custom dropdown list.
   - ☐ If you select **Computation** as a Column Type**:**
     - Click the **Computation Setting** (gear) **icon.**
     - Select the items and symbols from the lists that display to create your formula.
       - The formula displays on top of the window.
     - Select the **Show Column Total** check box if you wish the supplier to see the column total at the bottom of the total.
     - Click **Done** to save your formula.
       - Warning: Make sure you have created all the **Numeric** columns (by selecting Numeric in the Column Type) before creating a computation.
       - Note: You will only be allowed to do simple computations. "If" and "and" statements do not work in the CalUsource application.
4. Check **Mandatory** to make it mandatory for suppliers to fill out information in this column.
5. Check **Visible to Supplier** to allow suppliers to see the column information.
6. Check **For Supplier Response** allows suppliers to enter data in the column. This will help the supplier identify which columns they need to fill out. These fields are not always mandatory.

   Note: If **Mandatory** is checked, but **For Supplier Response** is not checked, the column's fields are mandatory for the event author to fill in. If **Mandatory** and **For Supplier Response** are both checked, it is mandatory for suppliers to fill in the information.

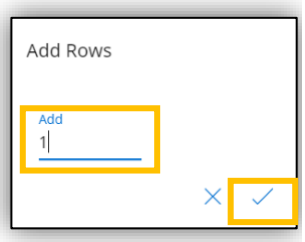
7. To map the column, click the down arrow in the **Column Mapping** column and select the corresponding field to which this column's information will display upon evaluation of the price sheet and when the event is flipped to contract. Mapping to **None** means that this information will not display and prevents evaluators from seeing estimated savings. If **None** is selected, the corresponding column will not flip to contract.
8. Click **Save.**

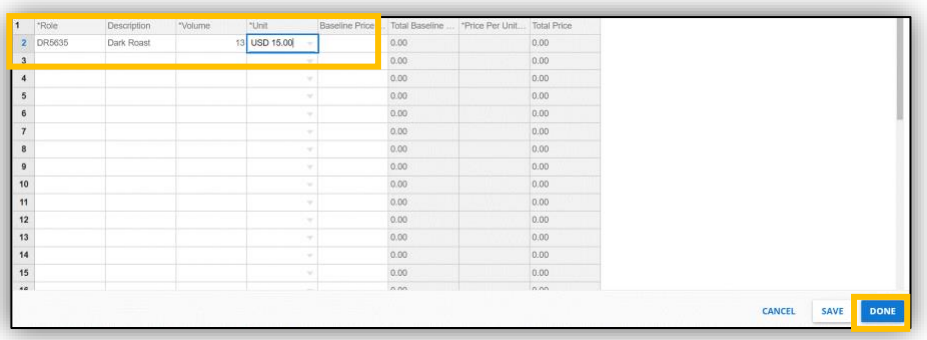
   ☐ Note: The system will validate your computation formula before saving it to the price sheet.

9. Click **Done**.

Entering Price Sheet Information

Once you have created Price Sheet columns (see Manage Price Sheet Columns above), enter the items that will display in the Pricing Sheet.





Enter Price Sheet Information:

1. To add rows to the price sheet, click the **Plus icon** on the right of the pricing sheet.
   Note: The application does not automatically add rows for you.
2. Enter the number of rows you want to add.
3. Click the checkmark. .
4. Enter the text you want to appear in each cell.
   - ☐ You can copy and paste information into each cell if it matches the data you previously entered in **Manage Columns.**
5. Click **Save.**
6. Click **Done.**

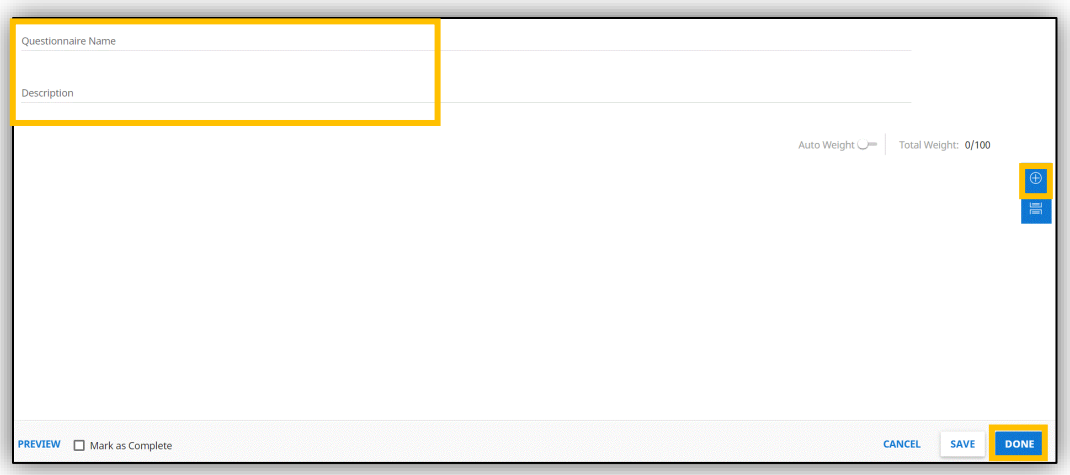
Note: Any column beginning with an asterisk (*****) is a mandatory field that must be completed prior to RFx publication.

Creating a Questionnaire and Adding Questions

Questionnaires are the means by which suppliers respond to your request for information about their capabilities in regards to your sourcing event. All questions in your event questionnaire must have weights assigned to them. Use the **Auto Weight** feature to distribute weights evenly across your questions out of a total of 100%. You also have the flexibility to assign your own weights manually.

Key Fields

- **Mandatory/Informative:** Select Mandatory if you want to score the answer to the question. Select Informative if the answer to the question should not be scored.
- **Auto-Weight**: If switched to the 'On' position, it automatically distributes weights for each question equally (e.g. four questions would each be weighted 25%).
- **Weight:** Used to manually assign a weight to each question.
- **Total Weight**: Displays **100/100** where the first number is the total weight you have assigned, and the second number refers to the total of 100%. So, if you have only allocated 90% out of 100% weighting to your questions, it will show as 90/100.
- **Lock/Unlock**: Locks a weight to a specific question. If you select **Auto-Weight** after custom weighing and then locking a particular question, the system would not change the weight of that question and would allocate the leftover % across the remaining questions.

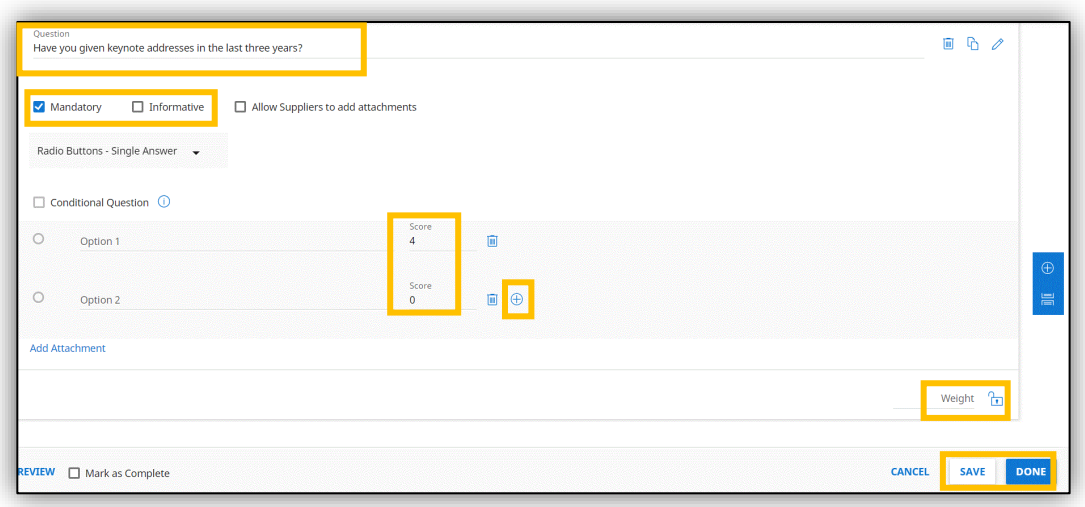


For additional information, see the Adding Questionnaires and Questions QRG or Assigning Weights to Questions QRG.

Add a Questionnaire:

1. Click **Create New Questionnaire.**
2. Type a brief descriptive title of the questionnaire in the **Questionnaire Name** field**.**
3. Type a description of the questions contained in the Questionnaire in the **Description** field**.**
4. Click **Save.**
5. Click the **Plus icon** to start creating questions.

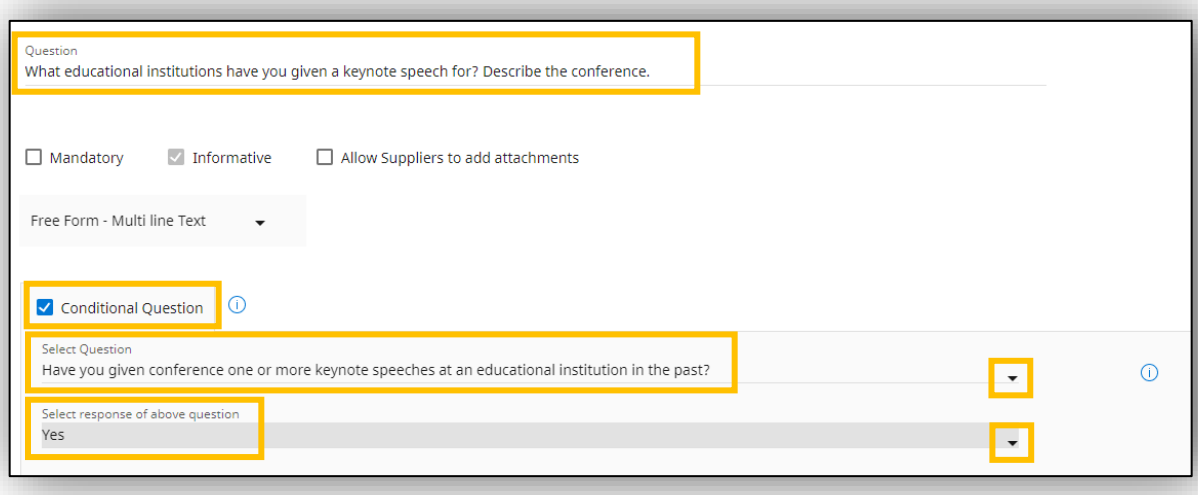
Create a Question:



1. Click the **Plus icon** to start creating questions.
2. Type in your question where the word **'Question**' displays.
3. Check the **Mandatory** checkbox to require the supplier to answer the question.
   - ☐ Mandatory questions require weights.
4. Check **Informative** if you do not want the question to be evaluated. These questions are used to get suppliers to provide informative statements.
   - ☐ Weights are not used with Informative questions.
5. If none of the checkboxes are selected, the supplier can skip that question.
6. Add the **Response type** (Free Form, Single line text, etc.) from the dropdown list that displays below the **Mandatory** and **Informative** checkboxes.
7. Add the question's percentage weight (of the overall questionnaire score) in the **Weight** field.
8. Click the **Lock icon** to lock in that question's weight so future question's weighting won't affect it.
9. Add an additional answer option by clicking the **Plus icon** that displays to the right of the last answer option.
10. Add a score for each answer option in the **Score** field.
11. Click **Save** after you complete each question.
12. Click the **Plus icon** in the far right to add another question.
13. Click **Done**.

Creating Conditional Questions

Conditional questions are sub-questions that only appear when the respondent provides a specific response to a previous question. To create a conditional question, you must first identify both the question and the specific answer response that will trigger the conditional question.

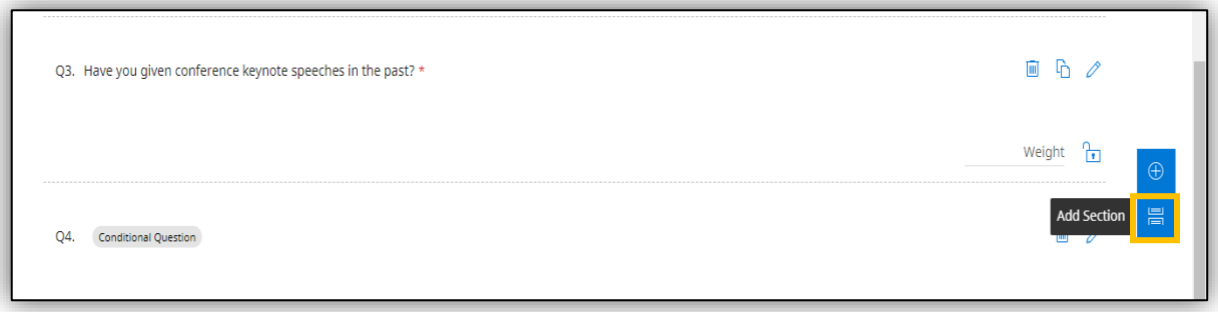


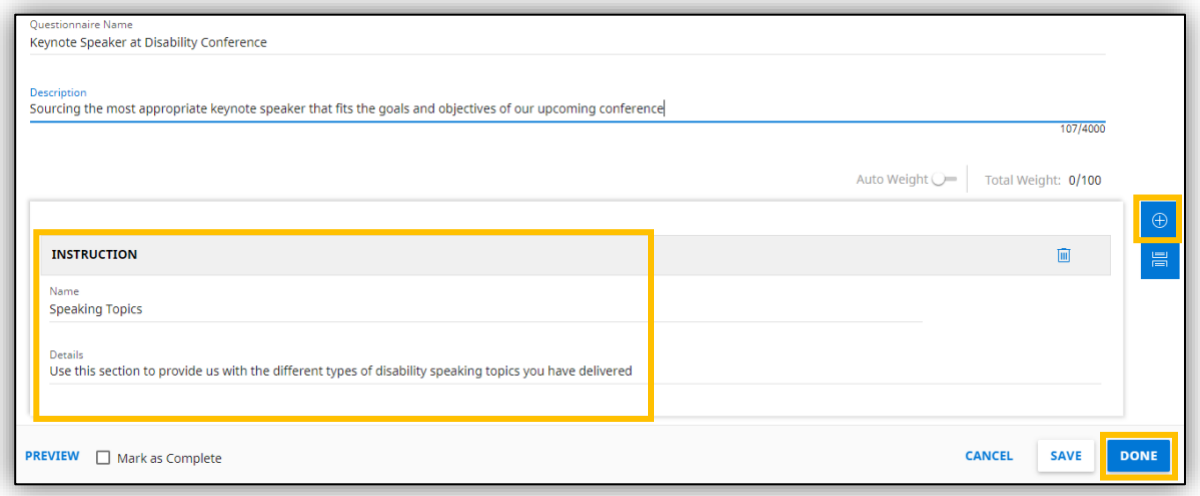
Create a Conditional Question:

1. First create the primary question that will trigger the conditional (secondary) question you wish to add. (See the ***Creating a Question*** section above.)
   - ☐ The primary question's response type must be either: ***Radio Buttons Single Answer***, or ***Check Boxes Multiple Answer***.
2. Click the **Plus icon** to create a new question.
3. In the **Question** field, type your secondary (conditional) question.
4. Select the **Conditional Question** checkbox to make this question conditional.
5. From the dropdown list in the **Select Question** field, select the primary question that will trigger the conditional (secondary) question to display.
6. From the dropdown list in the **Select Response of above question** field, select the response to the primary question that will trigger the conditional question.
7. Enter the required details to complete the question; i.e. mandatory/informative, response type, etc. (See ***Creating a Question*** above.)
8. Click **Save** when you are done.

Adding Questionnaire Sections

Questionnaire sections are used to organize your questions by topic or category. You will not be able to weigh each section separately.





Add a Questionnaire Section:

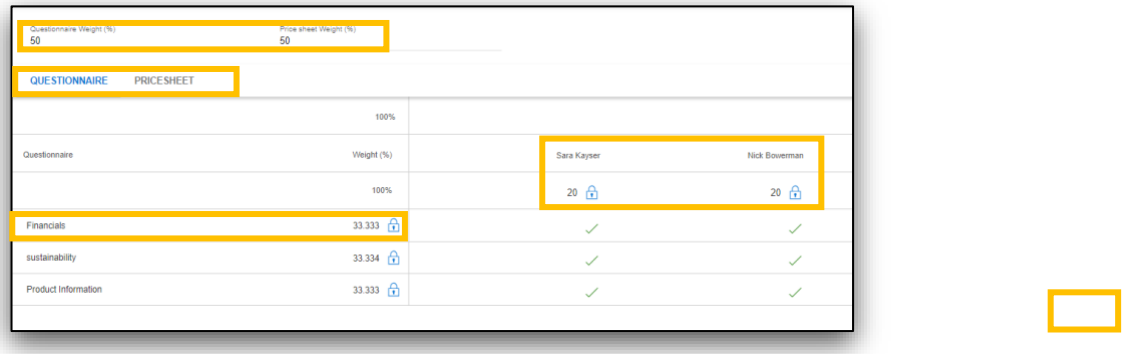
1. Click the **Section icon** on the right side of the screen**.**
   - ☐ Instructions for the new section will display.
2. Type a section name in the **Name** field.
3. Provide a description of the section in the **Details** field.
4. Click the **Plus icon** to add the first question for the section. (See the *Create a Question* section above.)
5. Click **Save** after adding a few questions to ensure your section is saved.

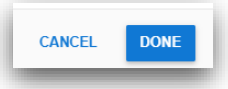
Adding a Scorecard

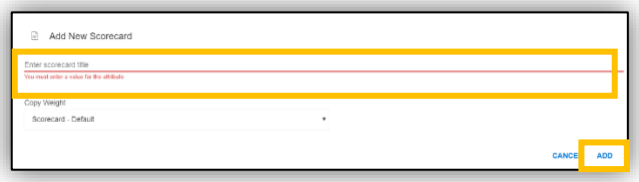
After all of an event's evaluators submit their scores, the RFx application compiles the scores and creates a scorecard. The scorecard allows the contract author to analyze the evaluators' scores of supplier responses to questionnaires and price sheets. Scorecards can be created before or after publishing the RFx event. Scorecards should only be worked on after you have established team configurations. UC and CSU practice best value weights that assign 75% weight to questionnaires and 25% weight to price sheets.

Key Fields

- **Create Scorecard –** Used to create a scorecard for your event
- **Manage Weight icon –** Used to assign weights to questionnaires and to zero out evaluator weights.
- **Questionnaire Weight %** and **Price Sheet Weight % –** Assigns the overall percentage weight of each event questionnaire and price sheet.







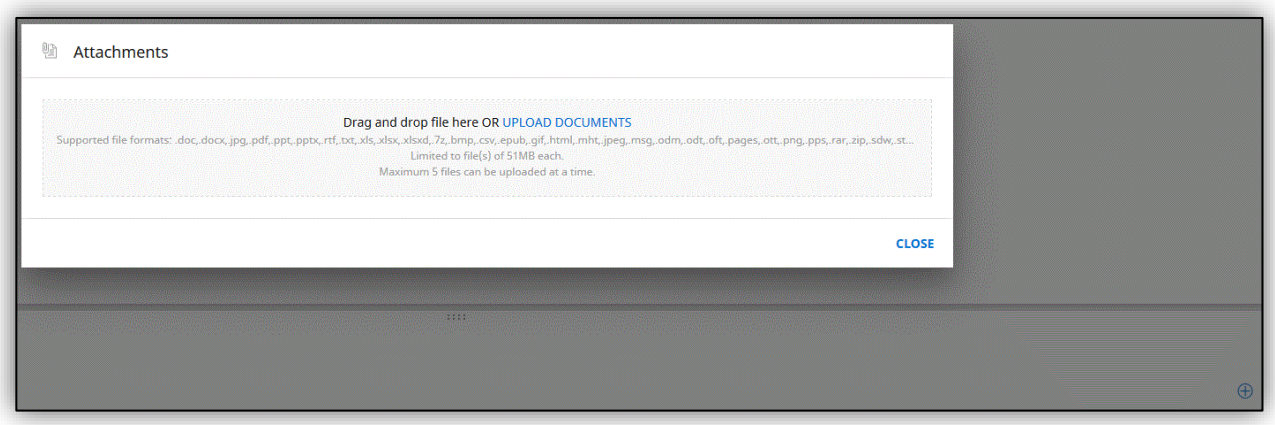
For additional information, see the Creating a Scorecard QRG.

Add a Scorecard:

1. Click the **Action** icon at the top right of the screen.
   - ☐ The **Score Analysis – Scorecard** screen displays.
2. Click **Create Scorecard** on the left side of the screen.
3. Enter the Scorecard title in the **Add New Scorecard** window.
4. Click **Add.**
   - ☐ The new scorecard will be listed on the left side of the Scorecard window.
5. Click on the name of the scorecard you just created.
6. Click on the **Manage Weights** (wrench) **icon.**
   - ☐ The **Manage Weights** screen displays.
7. Assign 75% in the **Questionnaire Weight %** field at the top of the scorecard.
8. Assign 25% in the **Price Sheet Weight %** field at the top of the scorecard.
9. Click on **Questionnaire** to assign the weights and scores of the questionnaire. The total weight must equal 100%.
   - ☐ All evaluators and co-authors will be listed.
10. Unlock each evaluator's % and remove yourself as an evaluator by giving yourself 0%.
11. Click auto-weight to redistribute the weight among evaluators.
12. Click **Price Sheet.**
13. Assign weights to all price sheets. The total weight for all price sheets must equal 100%.
14. Unlock each of the evaluator's % and change their % weight to 0%. As a result, the event author should have 100% of the price weight for evaluation.
15. Click **Done.**
    - ☐ **The Score Analysis – Scorecard** redisplays with the **Finalize Scorecard** and **Close** buttons**.**
16. Click **Finalize Scorecard.**
17. Click **Close.**

Adding Attachments

The RFx Attachment section is used to attach non-guideline or questionnaire documents that you want your suppliers to see; e.g. Conflicts of Interest, RFP attachments, calendar, etc.



For additional information, click here for the Adding Attachments to Events QRG.

Add Attachments:

1. Click the **Plus icon** in the lower right of the **Attachments** section.
2. Drag and drop or upload documents in the window that displays.
3. Click **Close.**
4. Click the **Comments icon** to explain the purpose of the attached file.
5. Uncheck the **Visible to Suppliers** checkbox if you do not want the supplier to see the attachment.

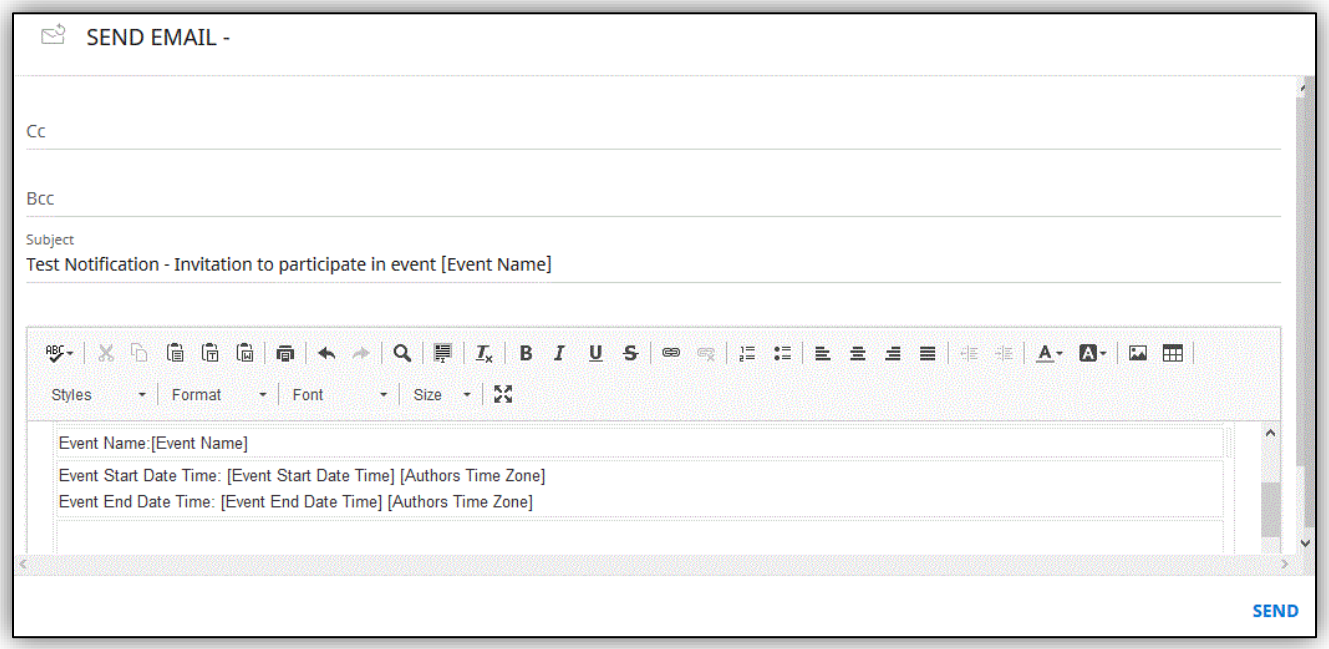
Notes:

- Files will display in the Attachment section (and to suppliers) in the order they are uploaded. You will not be able to change the order after the files are uploaded.
- You will only be able to upload five files at a time. However, you can repeat the upload process for an unlimited number of times.

Publishing an RFx

Once you have reviewed the RFx document and are certain that all required sections are completed, you can publish your event.

Make sure that all questions have been assigned a weight, all pricing sheet information has been added correctly and that all evaluators have been set up in the Team Members section, so that they will be able to review the suppliers' questionnaire responses.



For additional information, see the [Publishing/Editing a Sourcing Event QRG](#).

Publish an RFx:

1. Click **Submit**.
2. Click **Publish Event** in the Confirmation window.
   - ☐ The standard Invitation to Bid email message will display.
   - ☐ The suppliers' email addess(es) will pre-populate in the email **To** field.
3. Edit the email text as needed to reflect the needs of your event.
   - ☐ Best Practice: if you are editing the email notification, copy/paste the standard text into a Word document to make your changes so it will perform a spell check.
4. Add additional email recipients as needed in the cc: or bcc: columns.
5. Click **Send**.