RFx Overview:

SRS is a tool for executing a standard sourcing process for system wide, multi-campus and campus-specific sourcing events. SRS also allows for the electronic management of supplier information and communications.

Inviting a Supplier:

To invite a supplier to an event, check to see if the supplier is already registered. If not, from the email tab, select Refer Supplier to Register -> Select Email Template -> UC Supplier Registration Invite and send the generic UC Supplier Registration Invite email.

Creating an RFx:

Go to Sourcing Director -> RFx Explorer to get started

On the left side of the screen you will see a list of projects under a campus folder. Select the folder the event should be created under, usually this is campus -> commodity.

• Once under the correct folder click the green circle next to Create RFx from Template
• Select the desired RFx template
• Complete the RFx Configuration screen
• Review and edit the description of the RFx which was pulled from a template
• Edit the primary contact for the event
• Select suppliers to invite

• Create, Add, or Edit Prerequisites, Documents, Questions, and Items as necessary
• Once the RFx is complete you can click Send for Approval if approval is required

Communication to Suppliers:

You can communicate several ways with the Suppliers while the RFx is Released or Open.

Messages to Suppliers and Buyers:

Use this tab to directly communicate with suppliers that have opted into the event or with other Buyers on the event.

Q & A:

Suppliers can ask questions while the event is open. The RFx owner is notified when questions are submitted.

Collaboration Attachments:

This is where attachments for a specific event can be found. All attachment loaded by internal users, bidders and put on emails will be accessible here.

Questions? Please contact your Supplier Registration & Sourcing (SRS) Campus Primary Representative (CPR) if you have any questions.
Helpful Links:

To review the RFx Buyer training:  RFx Buyer Training Recording
For technical Assistance: support@ucprocure.zendesk.com

Key Reminders:

- **Bold** fields, or those with a red dot ●, are required fields
- Click Next to save your progress and move forward through the left hand navigation
- You can Save Progress at any time an pick up where you left off
- External visibility: Public v private events. If you are running a public event you do not need to invite any suppliers. For private events you must invite suppliers and only they will be able to view the event
- Field need date: first delivery needed on this date
- Release date: the date the event will be visible
- Opening date: event is visible though not available to bid on
- Required to bid: the bidder must include this line item in the bid submission
- Document description has a 50 character limit

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