

RFP/RFI Supplier Quick Reference Guide



RfX Response List > LO V2RFx 080906 > PROP-BL-000749-2006

RfX RFP-00107-2006: LO V2RFx 080906

6 RfX 7 Response PROP-BL-00 8 -2006 9 RFP-00 10 2006: LO 11 Fx 08090 12

Save Undo Document Actions Reports Attachments Discussions In Progress

1 Header 2 Schedule 3 Information 4 Questions 5 Line Items

Title: LO V2RFx 080906
RfX Description: Training day 2 RFP
Current phase of RfX: Open For Response
Customer Company: Broadlane
Contact Person: Lee Oakley
Internal RfX Response ID:

General Status

RfX Response Status: In Progress
Response Due Date: 8/23/06 5:00 PM CDT
Cover Page Comments:

1. **Header**-Review the **RFP/RFI Title, Contact person** (for questions) and add **Cover Page Comments**
2. **Schedule**-Determine the **schedule** of the RFP/RFI. The **open** and **close** date will be highlighted.
3. **Information**-Review informational material such as **Cover Letters, Instructions**, etc.
4. **Questions**-Respond to **Questions** asked within the RFP/RFI.
5. **Line Items**- Review **Line Item** information (if provided)
6. **Save**- **Save** your document while working in the application. (**TIP:** Save and Save often)
7. **Undo**- **Undo** your last action.
8. **Actions**- **Save a copy** of your RFP/RFI response by **creating** an **electronic PDF** file.
9. **Reports**- Review the **questions** that you have **not answered**.
10. **Attachments**-**Download attachments** provided by Broadlane and **add attachments** (Pricing files, cross reference guides) as necessary.
11. **Discussions**- Generate discussions related to the RFP, clarify questions & communicate with Broadlane.
12. **Created-Phase Button**-Change the phase of your RFP to Preliminary and then to Firm so that your data can be analyzed by Broadlane.

Responding to a RFX

Process Steps

1. Use the **URL, username** and **password** provided within the email notification, to log into the system.
2. From the **Workbench**, open the RFX you wish to respond to by clicking its ID from within the Active RFX channel.
3. From the RFX Response Table, open the RFX response by select it's ID (blue hyperlink).
4. Indicate your intent to respond. Click Finish.
5. Use the **Header, Schedule, and Information Tabs** to review details of the RFX.
6. Open **Attachments**, and Discussions, from the Document Toolbar, to review supporting documentation and conversations regarding this event.
7. To **Respond** to the RFX Questions:
 - a. Select the **Questions Tab**.
 - b. Select the title of the *section* you wish to begin responding to.
 - c. Enter answers to each question in the space provided. A red asterisk (*) indicates a response is required.
 - d. Click **Save**. Repeat for each General Criteria Section. Close page using the "x" icon on the top right corner of the page.
 - e. Select the **Line Items Tab**. Respond to each line item question. Click **Save**.
8. The system enables a supplier to submit a proposal once the Questions are complete and the proposal's status is Preliminary /Firm. To change a status, do the following:
 - a. From the Document **Header**, click **In Progress**.
 - b. The **Change Phase** Dialog displays.
 - c. Select the title of status you wish to move your RFX into (Preliminary). Click **OK**. Now select Firm. Click **OK**.
 - d. The updated Status appears on the Document Toolbar.

Note: Once the proposal Phase has advanced to **Preliminary** and then to **Firm**, responses may not be modified. Broadlane will complete its review and evaluation of all submitted proposals.



Note: Refer to the online learning center to watch an interactive tutorial covering the process of responding to an electronic RFP/RFI.