Creating an RFI

CLICK ICON TO REVEAL A **BEST PRACTICE** RECOMMENDATION FOR THE TOPIC.

A **Request for Information** is a solicitation document used to obtain general information about products, services or suppliers. View the [Best Practice] document for details regarding when to use an RFI vs. RFQ vs. RFI.

From the Sourcing Director tab 1) select RFI Explorer, 2) select the appropriate folder and 3) select the icon to Create New RFx from Template.

- Select **RFI Sealed** from the Template list.

Template	Type	Updated By	Date Updated	
RFI Sealed (description)	Sealed	bagius	05 Dec 2013 11:05 AM PST	Select
RFP Sealed (description)	Sealed	ahiggins	05 Dec 2013 02:22 PM PST	Select

The **Main Menu** will appear with hyperlinks to each section of the RFI. The process for creating an RFI is the same as [Creating an RFP/RFQ] except where noted in the following sections. (**Note**: an RFI does not contain Items.)

RFx Configuration ☐
Description ☑
Contact Information ☐
Select Users for RFx ☑
Workflow Configuration ☐
Supplier Invitation ☐
Prerequisites ☑
Documents ☐
Questions ☐
Supplier Bid Envelopes ☐
Summary ☐

RFx Configuration

Complete the RFx Configuration page the same as you would when creating an RFP/RFQ with the following exception:

- **RFI Title** = "**RFI**" + Item Description

Description

The RFI Description is an editable field that is visible to suppliers. The default template contains three sections: 1) General Information, 2) Communications Regarding this RFI, and 3) Response Submittal and Evaluation.

RFx Configuration
Description
Contact Information
Select Users for RFx

General Information
The purpose of this Request for Information ("RFI") is to gather information and complexity of the University of California ("UC"), and which may possess the re information and does not constitute a binding procurement process.

Please provide information on the following: [Enter your RFI Description here]
Communications Regarding this RFI
All communications, including any requests for clarification should be submitt (SRS) tool. With the exception of the designated contact as provided in this R this solicitation.
(Optional) An RFI Conference Call/Webinar

NEW

- All highlighted fields must be completed or modified.

- Enter details into the Optional RFI Conference Call/Webinar section, if necessary. Delete if no Call/Webinar is scheduled.

- Buyers can add additional information to the Description but please **do not delete** the default language.

Prerequisites

The RFI template contains one mandatory prerequisite: the Supplier Bidding Guide.

- Additional prerequisites can be attached to the RFI by clicking the **Add Prerequisite** button to upload a file from your computer, or the **Copy Prerequisites from Library** button to display a list of Library items to choose from.

Prerequisites (UCOP)
Add Prerequisite | Copy Prerequisites From Library

Prerequisite Name	Type	Manage
Supplier Bidding Guide preview	Mandatory	▼ Manage

Questions? Please contact your Supplier Registration & Sourcing (SRS) [Campus Primary Representative (CPR)].

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