State of Oklahoma CORE Project

Purchasing Course P210
Solicitations - Request for Proposal, Invitation to Bid, Request for Quote
Training Manual

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3130 Kilgore Road, Suite 400
Rancho Cordova, CA 95670
916.669.3720
www.maximus.com

DISCLAIMERS

MAXIMUS ERP Solutions

Written by MAXIMUS, ERP Solutions Division, March 2003, revised July, 2003.

State of Oklahoma

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EXCLUSION

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3130 Kilgore Road, Suite 400
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SOLICITATIONS – REQUEST FOR PROPOSAL, INVITATION TO BID, REQUESTS FOR QUOTES

OVERVIEW

To promote competition and ensure fair purchasing practices, The State of Oklahoma requires Request for Quotes (RFQs) for Requisitions based on agency discretion. The RFQ process assists Buyers in identifying which vendors carry the types of items requested. Once the vendors are identified, a RFQ is dispatched to them and their responses recorded. Buyers can perform online analyses of the responses and then generate Purchase Orders/Contracts based on awarded quantities. RFQ Lines can be awarded to a single vendor or divided among multiple vendors.

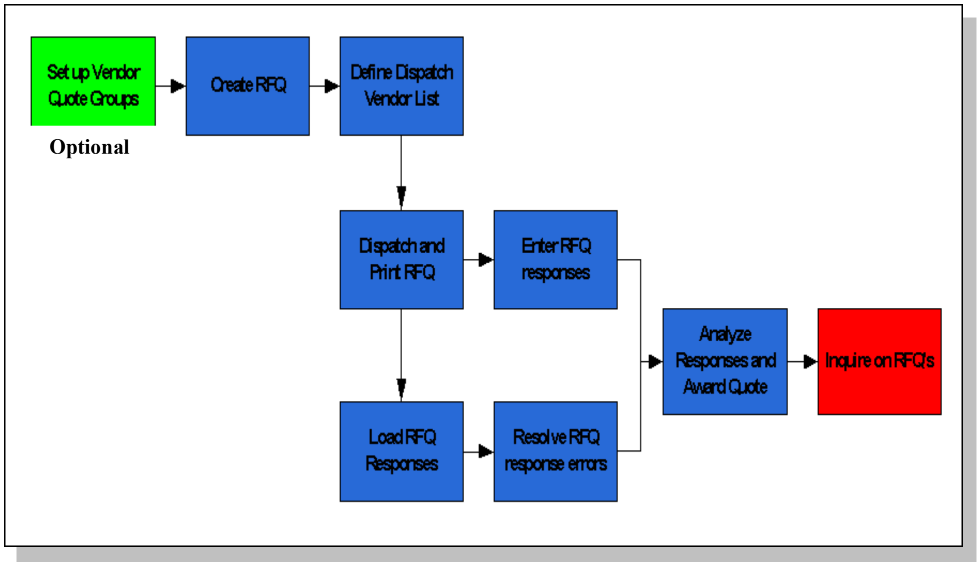
NOTE: For ITB's and RFP's the State will use the RFQ process or the Strategic Sourcing process.

The RFQ process enables you to:

- Generate RFQs from requisitions or create them directly
- Specify groups of vendors to receive the RFQs
- Dispatch the RFQs
- Record your responses
- Perform online analysis
- Generate PO's or Vendor Contracts based on awarded quantities
- Award each RFQ line to a single vendor or allocate a single line quantity to multiple vendors

You can establish one RFQ and dispatch it to as many vendors as needed. You can also send an RFQ to a vendor that is not yet approved within the purchasing system, but the vendor must be approved before you can award the RFQ to that vendor. Although the system allows the building of RFQs from scratch, usually RFQs are created from Requisitions.

The following diagram illustrates the flow of information and transactions involved in the RFQ process.



NOTE: Throughout this manual page shots are included to illustrate and describe the data fields that must be entered for specific transactions. Not all pages or fields on a page will be explained. This manual focuses on those pages and fields that are required for data entry for the State of Oklahoma.

Step 1 – Build Vendor Quote Groups (Optional)

Overview

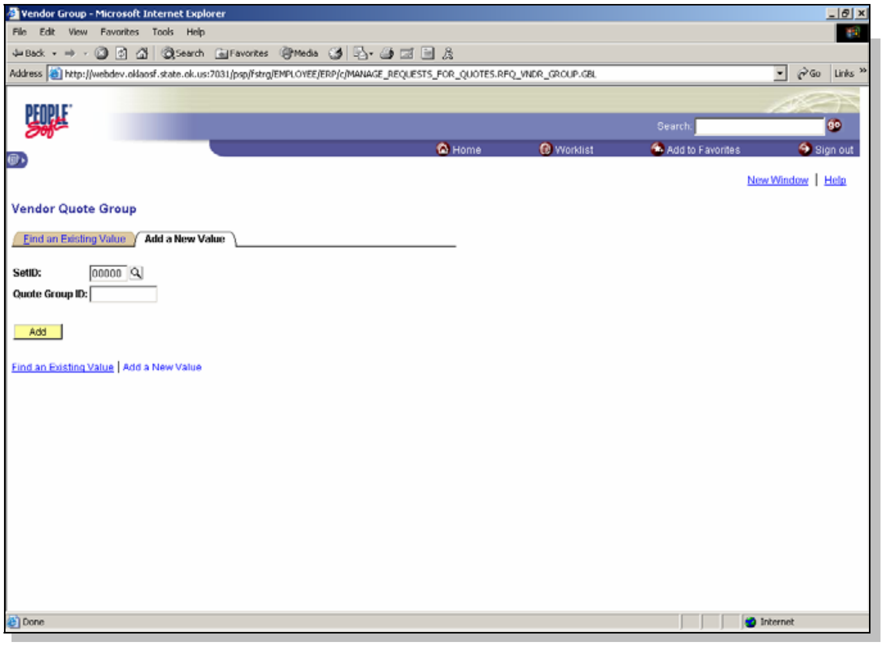
Use the Vendor Quote Group to select any number of vendors from the Vendor Table and add them to a Vendor Quote Group. PeopleSoft enables you to establish groups of vendors specific to particular items, locations, or other criteria under a single vendor quote group ID. You can use these groups to conveniently send your RFQs to the entire group or a subset of the group.

Follow the navigation below to add vendors to a Vendor Quote Group.

Navigation: Purchasing > Requests for Quotes > Vendor Group

Add a New Value

Vendor Quote Groups are set up particular to Item Categories or other criteria deemed important or unique to a purchase. They make using RFQs easier by having pre-set lists of vendors. The first step is to define a new Quote Group ID.

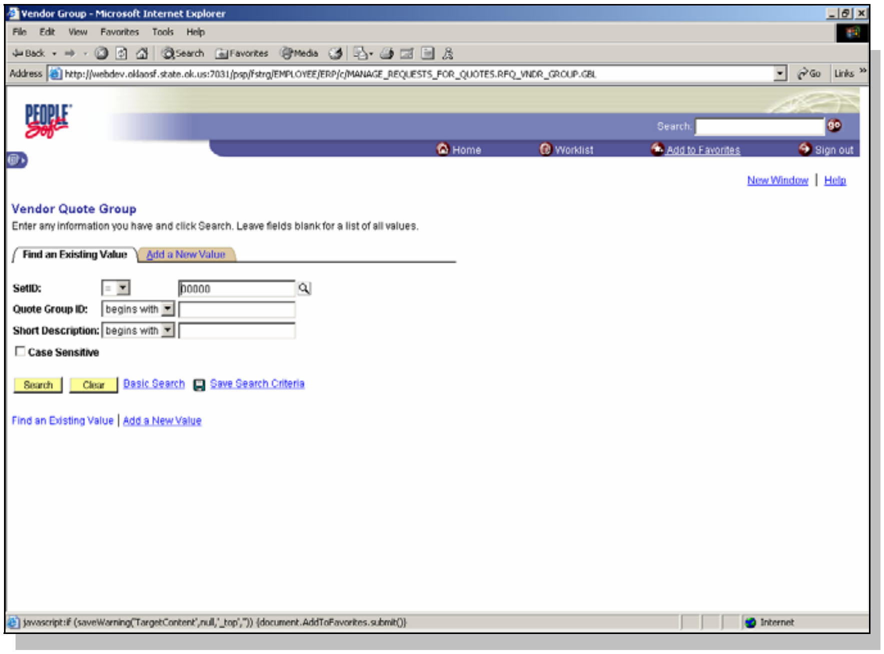


Enter a Set ID at the prompt or search for one by clicking the lookup icon. Enter a description for the new Vendor Quote Group in the Create Group ID. This new Vendor Quote Group is now set up for continued use.

Click the Add button, which will display the List of Vendors page.

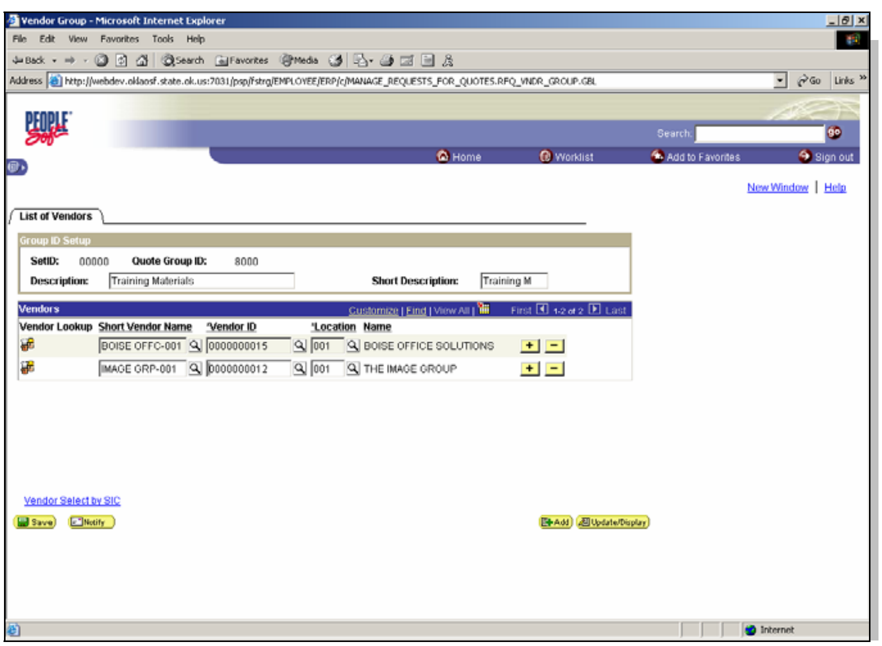
Find an Existing Value

If you have all ready created a Vendor Group you can select the vendor by clicking on the Find an Existing Value tab. Enter the Group ID or Short Description then click the Search button.



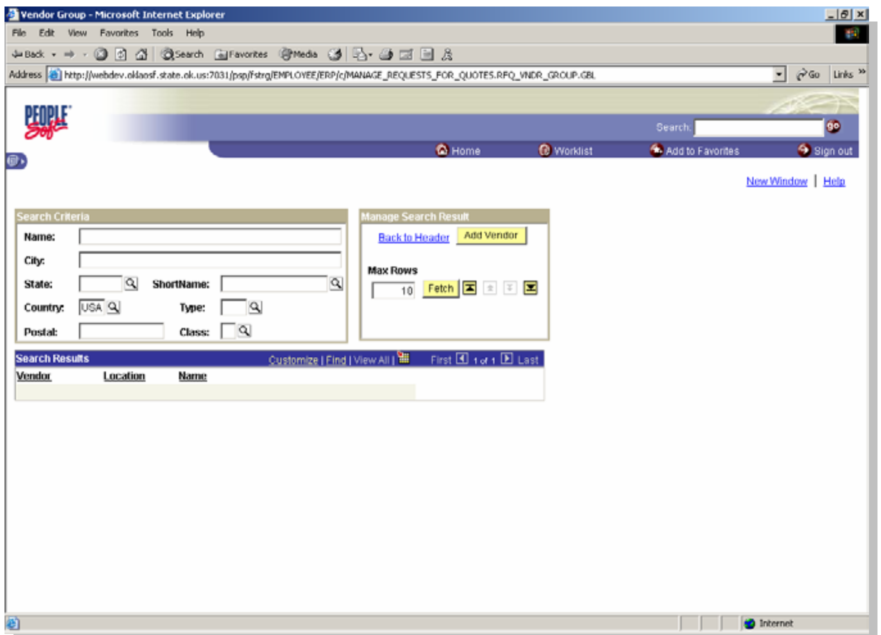
List of Vendors

Enter a description for the Vendor Group then enter the vendors to be included in the Quote Group. The Search button can be used to choose from the list of vendors currently set up in the system. To add additional lines click the + icon to add vendors to the Group.



NOTE: Re- Capture List of Vendors screen shot to reflect Vendors Select by link.

The Vendor Lookup button brings up a search criteria page that will provide a search of the vendor file by criteria listed on this search page.



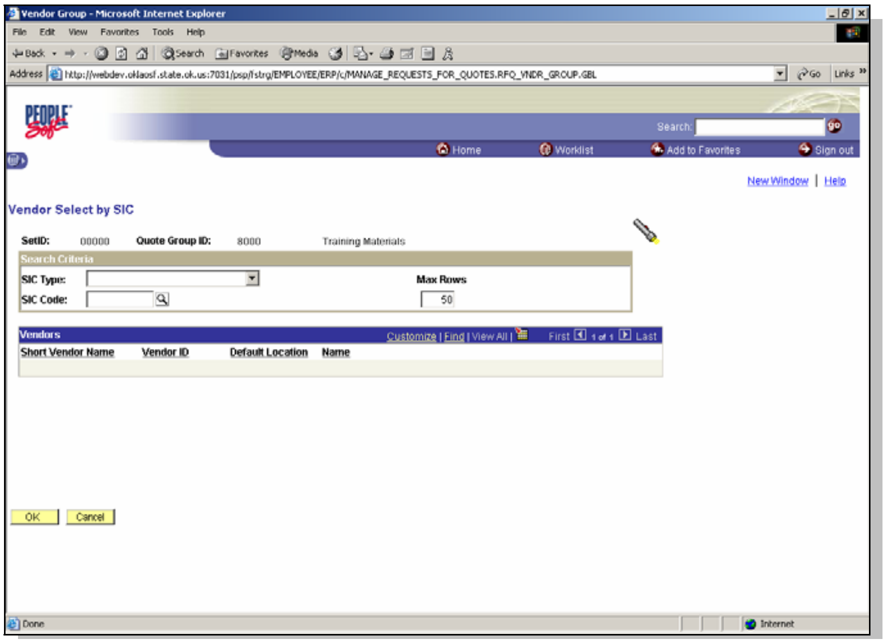
Through the use of wild card (%), vendors can be found with only partial name entries, or vendors with similar zip codes can be accessed. For example **%Boise** will find the vendor Boise Office Solutions. Once the system lists these possible vendors, vendors can then be selected for the RFQ Quote Group.

After selecting the Vendors click the Add Vendor button to add your vendors to the Quote Group.

After selecting the Vendors click the Save button to save your Vendor Quote Group.

Vendors By Category Code

To search for vendors by category code click on the Vendor Select by SIC link located on the List of Vendors page.



NOTE: Re- Capture screen shot to reflect Vendors by Category.

Category Code - In accordance with the category type you select, the system provides an appropriate list of category codes. Select a code for the vendor based on the category code information you selected.

Click the OK button to return to the List of Vendors page.

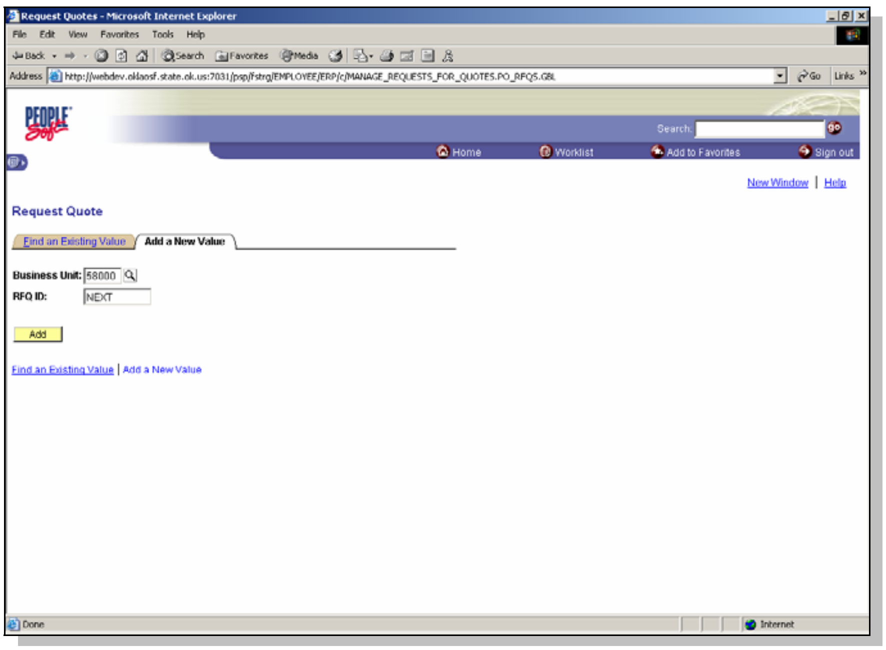
Step 2 – Create a Request for Quote

Overview

Initiate the Request for Quote from this page. You can create it ad-hoc or copy from a requisition or another RFQ. Requisitions must be budget checked and approved, not on hold, and not in processing for sourcing at the moment of the copy attempt.

Follow the navigation below to add or view a RFQ.

Navigation: Purchasing > Requests for Quotes > Request Quotes:



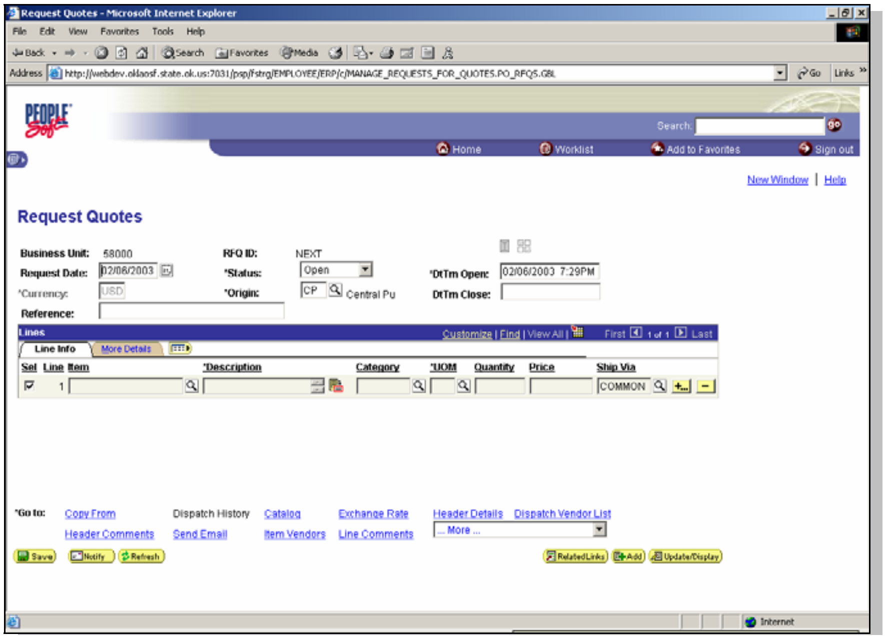
By default the Add a New Value tab is displayed. Click the 

button to take you to the Request for Quotes Header page.

NOTE: Auto numbering. To identify a RFQ the first 3 characters will represent the agency number (Example 4520001).

REQUEST FOR QUOTES HEADER PAGE

The header of an RFQ provides information that applies to the entire RFQ. Most RFQ header information defaults in from the Requisition.



Request Date – This will default to the system (current) date.

DtTm Open – This date defaults to the current date and time. The date represents the date and time the RFQ becomes open for vendor response. The date can be overridden.

DtTm Close – Input the closing date and time of the RFQ

Origin – Various codes used to describe the type of RFQ and/or how it was created and how it will be routed. Choose from the following:

- AGY – Agency
- CAP – Construction and Properties
- CP – Central Purchasing
- LSG – Leasing

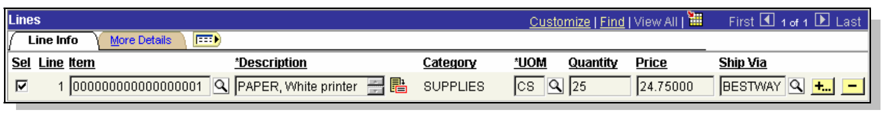
Reference – Defaults in from the Requisition number if an RFQ is created by copying from a Requisition.

Status – Displays the status of the RFQ. RFQ's will default in as an Open status. The RFQ cannot be dispatched until it is approved. Choose from the following:

- **Approved** – RFQ is ready to be dispatched.
- **Canceled** – RFQ has been rejected.
- **Closed** – RFQ has been closed.
- **On Hold** – REF is pending.
- **Open** – RFQ is not ready to be dispatched.

Request for Quotes Lines

RFQ Lines identify the items and quantities to be quoted and provide item-specific information, such as unit of measure, price, and shipping requirements. Additional lines (items) can be inserted on the page to reflect the needs of the RFQ. As with the Header, most of the Line data defaults in from the Requisition.



NOTE: The Item in the Line Info will be the commodity code. A list of valid values is available in a drop down box next to the Category field. The Category field is the commodity code at the upper level and is tied to the vendor registration.

Item – The box on the right will be the description of the item.

Category – A listing of valid values is available in a drop down box

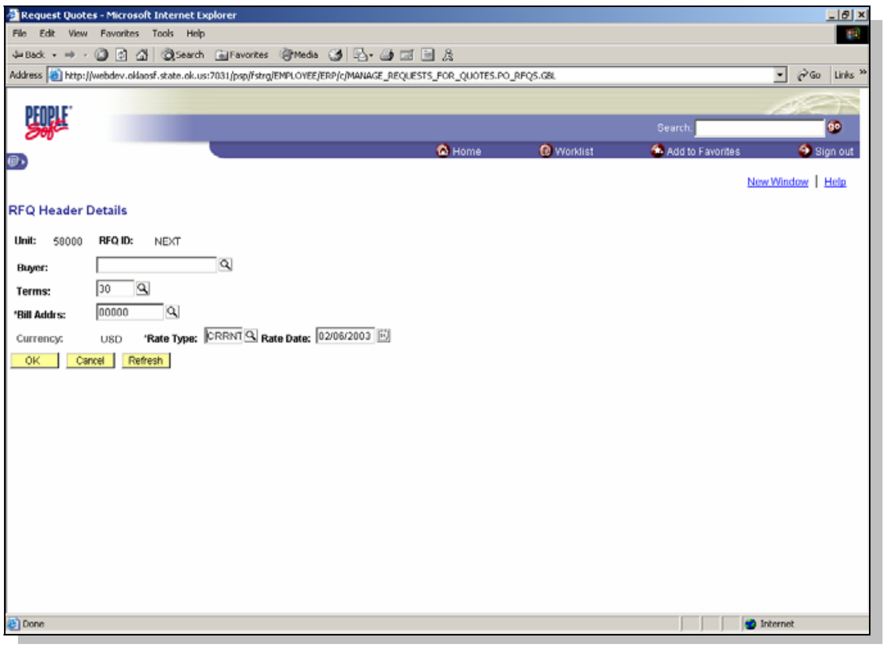
UOM – Select the appropriate unit of measure from the drop down box

Price – When item ID is used this will default. The User can input this.

Quantity – Enter the quantity associated with the RFQ

HEADER DETAILS

Clicking the Header Details link to access this page.



RFQ ID – Defaults as NEXT. RFQ ID will be assigned when saved.

Buyer – Defaults from the Requisition information. Can be changed if needed.

Terms – Defaults from the Requisition information. Can be changed if needed.

Bill Addrs – Accounts Payable dept.

Rate Type – Defaults from the Requisition and the default value is “CRRNT”.

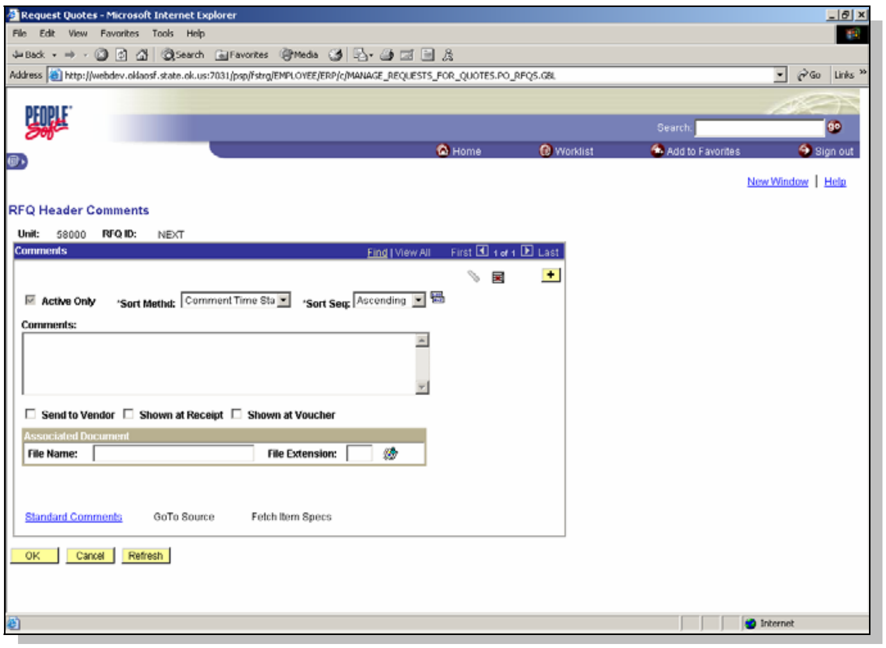
Rate Date – This date defaults to the current date and time. The date is used for currency conversions.

Verify the data and click the 

button to return the Request Quotes page.

Header Comments

Clicking the Header Comments link to access this page.



NOTE: The Send to Vendor check (✓) box by default will be checked.

NOTE: When there are multiple comments, the system will display only the most recent comment. The Find | View All First 1 of 3 Last display indicates the number of comments available for viewing. To view the remaining comments, either press the ▶ to go to the next comment or press View All to see all of the comments in the scroll area. To return to viewing only one line and its associated schedules, press View 1.

Active Only - Select to retrieve only active comments. You can retrieve only the comments that are active by checking this box and pressing the Load Comments icon.

Sort Method – Select one of the following:

- **Comment Time Stamp –** Sorts the comments by the time stamp assigned to them when they were created.
- **Vendor Flag –** Sorts the comments flagged to be sent to the vendor.

Sort Seq – Select Ascending or Descending.

- Click the **Comment Sort** icon to sort comments according to the selections you made in the Sort Method and Sort Seq fields.

Comments – Enter free form comments.

- Click the **Load Comments** icon to load existing comments into the comments text box. This button appears only if existing comments are available.

Click the Load Comments button to retrieve the comments that exist for this contract. If comments exist and have already been loaded, you will get the following message:

Override existing comments? (10207,14)

Comments have been previously loaded, and have possibly been worked on already.

Re-fetching the comments will override all the comments that you have worked on. However, any context that was previously saved as a standard comments will still be saved after the transaction is finished.

Press OK to proceed, or
Press Cancel to stop loading comments again.

OK Cancel

Click the **Delete button** to deactivate a current comment. If you deactivated a comment by mistake, press the . This button is visible only if you deactivated a comment.

Send to Vendor – If the comments are to print on RFQ, PO, and Contracts and dispatched to the vendors, then select this option. If the comments are for internal use only, leave the check box un-checked.

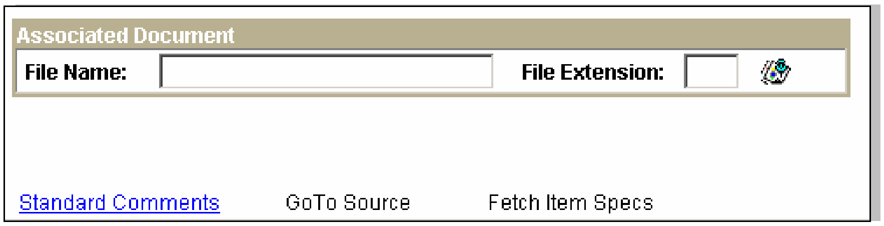
Shown at Receipt – Select if the comments are to appear on the receipt documents.

Shown at Voucher – Select if the comments are to appear on the vouchers.

To add additional comments, click on the + button in the upper right corner of the comment page. When you have finished entering your comments, click the OK button to return to the Request Quotes form page.

ASSOCIATED DOCUMENTS (FILE ATTACHMENTS)

Use the fields in this group box to attach files to your transaction. You can attach any type of file that you have defined on the File Locations page. The file you want to attach must reside in the file directory defined for the file type on the File Location page. The documents you choose to attach do not transmit with the PO to the vendor.



File Name - Enter the name of the file you want to attach. Include the drive and folder(s) with the file name (c:/my documents/filename.doc).

File Extension - Enter the file extension (.doc, .xls, pdf, etc.).

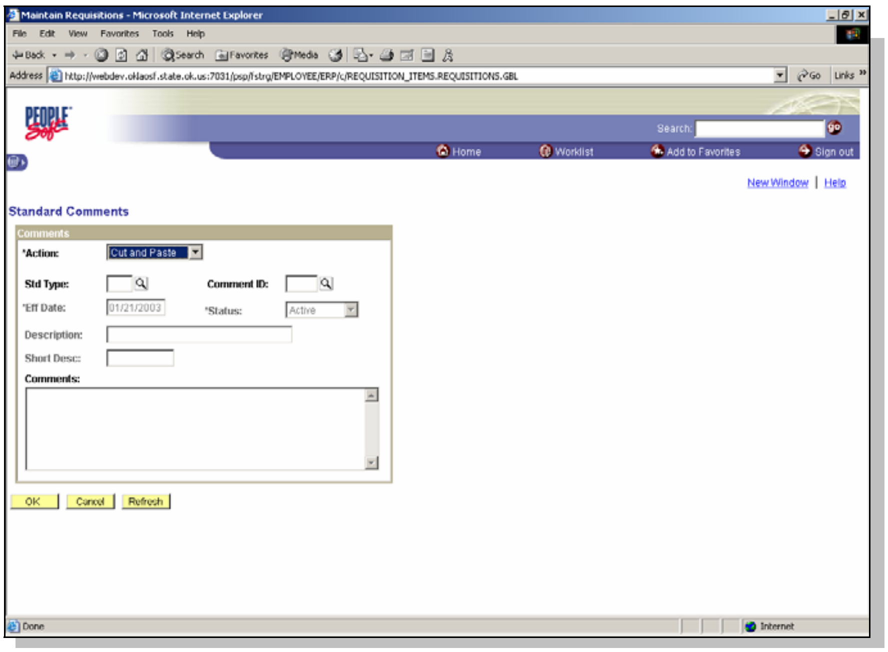
- Click the Launch File icon to launch an attached file. You must enter a file name and extension in the **Associated Document** fields before the system can launch the file.

Fetch Item Specs – To copy in item detailed specifications.

Go To Source - If the transaction's comments originated with another transaction, you may select this link to view the originating source transaction. This option is available only if a source is available.
For example, if the PO was sourced from a requisition containing these comments, you can select this link to view the originating requisition.

Standard Comments

Access the page by clicking on the Standard Comments link.



Action – Select only the **Cut and Paste** option:

- **Cut and Paste –** Will make the standard comments selected available on the comments page. The standard comments may be modified, modifications on this page will not affect the original standard comments.

Std Type – Select a Code. Click on the Lookup icon and the Lookup STD Type page will be displayed. Enter the search criteria to display a list of available standard comment types. Click on the desired type to return to the standard comments page.

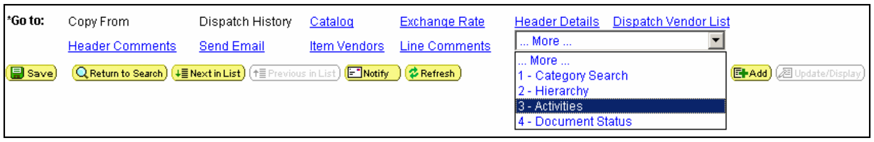
Comment ID - Select a standard comment ID. Click on the Comment ID Lookup icon and the Lookup Comment ID page is displayed. Enter the search criteria to display a list of available standard comment ID's. Click the Look Up button. Select the stand comments you desire. This will then take you back to the standard comment page.

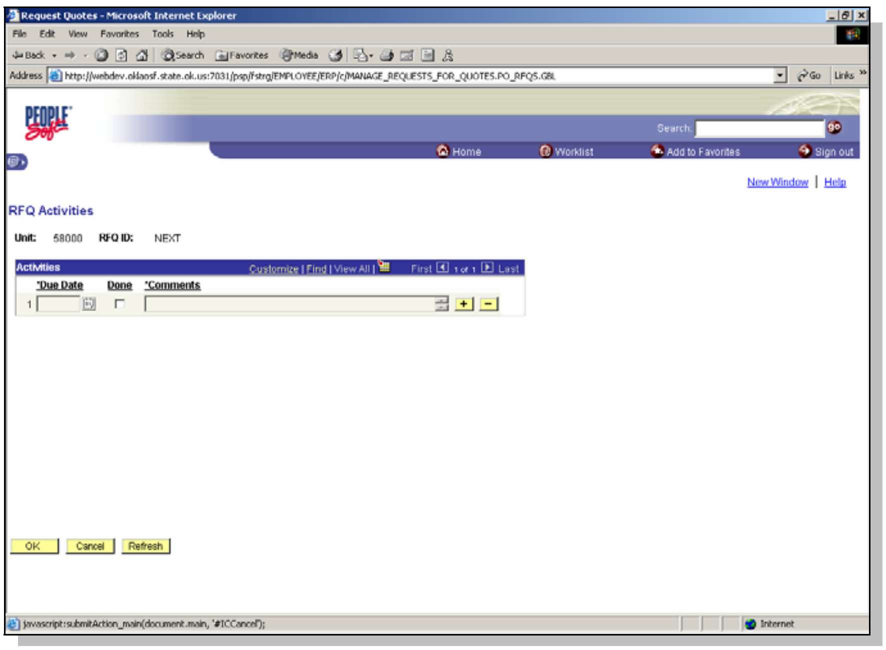
Click on the OK button to return to the Header Comments. Then click on the OK button to return to the Request Quotes page.

ACTIVITIES

The activity page tracks any activities related to the RFQ the Buyer wishes to record. Each activity can be assigned a due date and checked off when done.

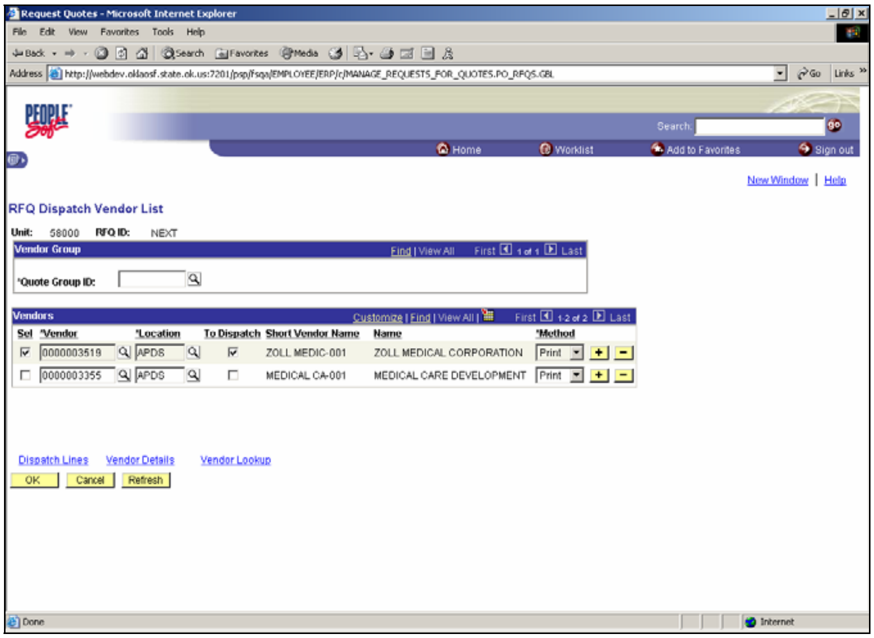
From the Request Quotes page select Activities from the … More …drop down list.





DISPATCH VENDOR LIST

Click the Dispatch Vendor List link to display the RFQ Dispatch Vendor List page.



Quote Group ID – Select a vendor quote group ID to make the group the dispatch vendor list for the RFQ. You can add or delete vendors from the list without affecting the original group from which you created them.

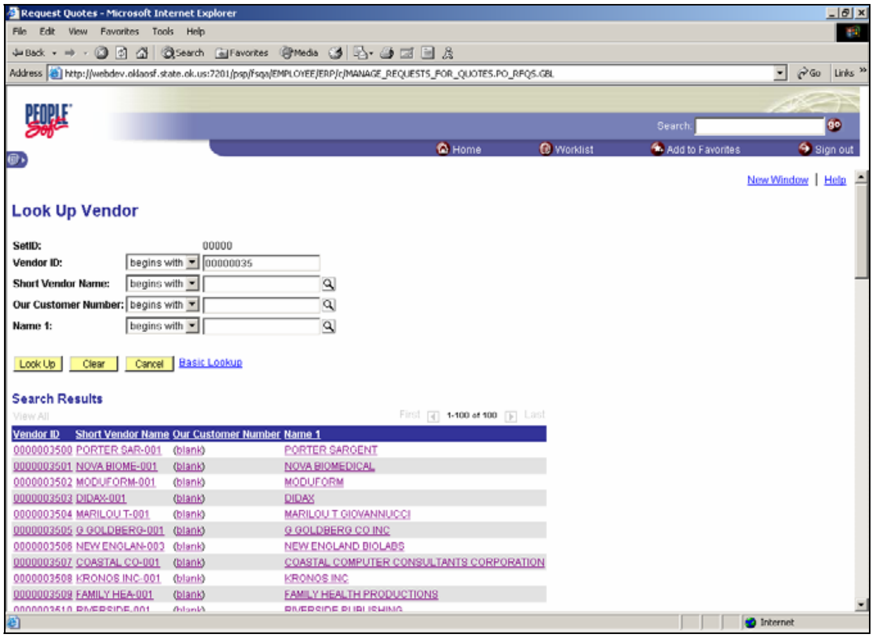
Sel – Select the vendor for RFQ

To Dispatch – Select a vendor to dispatch for the RFQ.

Method – Select "Print" as the method to receive information from the vendor.

Identify the vendors by selecting the lookup vendor icon. The Look Up Vendor page is displayed.

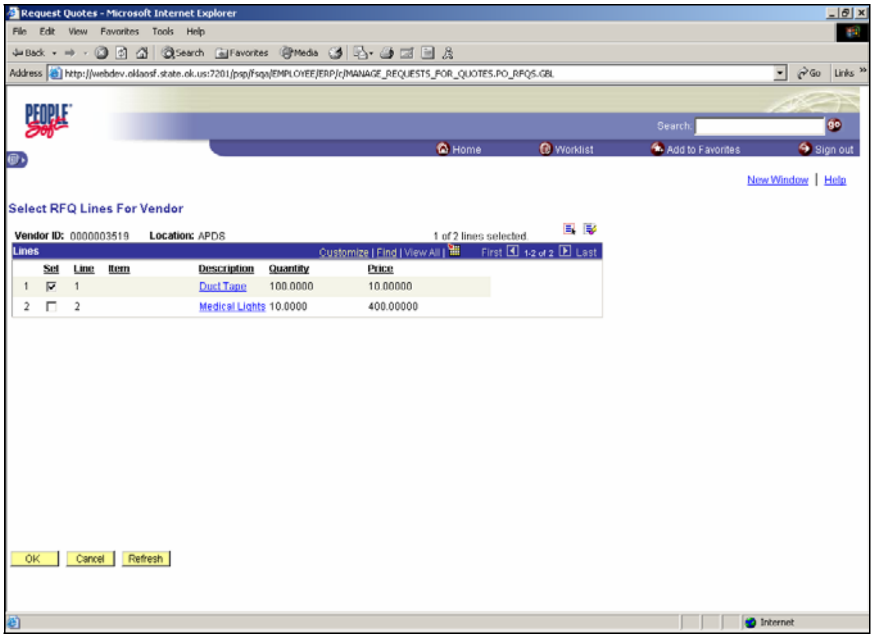
Look Up Vendor



Identify the vendors you want by entering the search criteria in the Look Up Vendor data fields. Click the Look Up button and select your vendor. Repeat the process for adding additional vendors.

Select a vendor from the RFQ Dispatch Vendor List page by placing a check (✓) next to the vendor. Click the Dispatch Lines link to view the Select RFQ Lines For Vendor page.

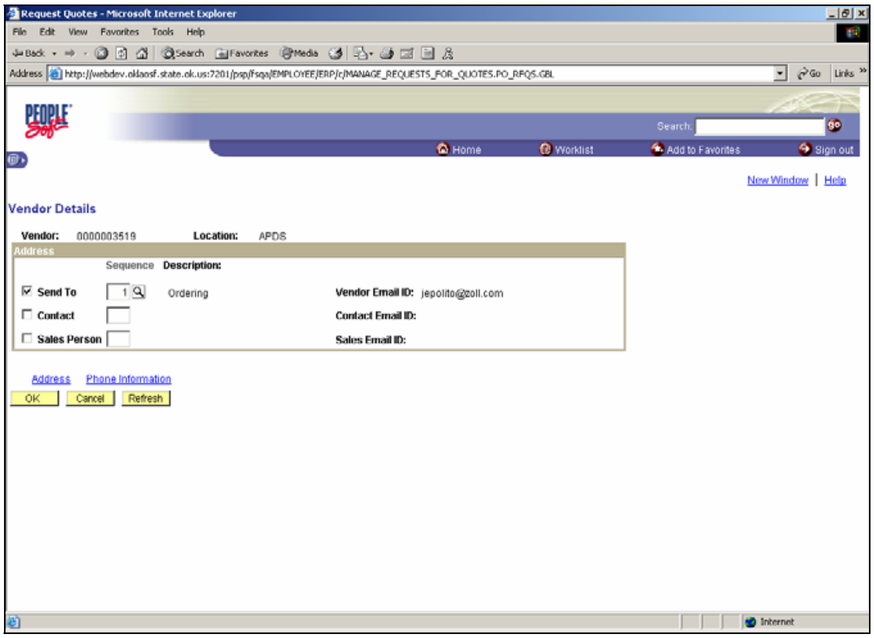
SELECT RFQ LINES FOR VENDOR



Select the line items to associate with the vendor you selected on the RFQ Dispatch Vendor List page. Click the OK button to return to the RFQ Dispatch Vendor List page. Repeat the process for any additional vendors if required.

Vendor Details

Click the Vendor Details link to view vendor detail information.

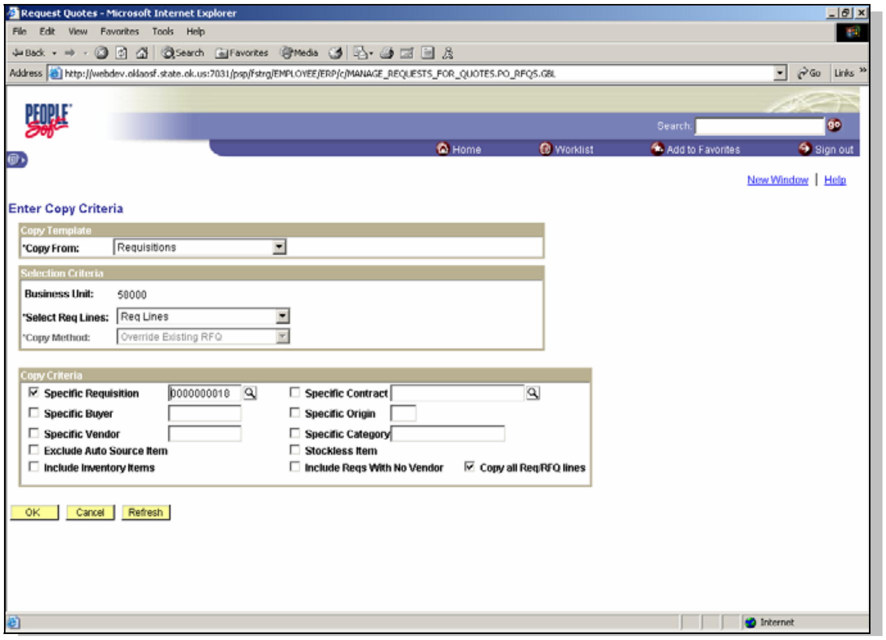


Click the OK button to return to the RFQ Dispatch Vendor List page. Click the OK button to return to the Request Quotes page. Click the Save button to save the RFQ.

Copy From

When the RFQ Header page is entered in the add mode, the copy link Copy From is available in the lower left corner of the page. When the Copy From link is clicked, the first page displayed identifies the source of the copy. While the system allows copying from existing Request For Quotes, you may also copy from Requisitions. If you copy from a requisition, you can copy only those lines that require an RFQ or all lines. You can limit the data that is copied or copy all data, depending on your criteria.

Copy From Requisition



Copying from Requisitions requires that the Requisition be approved, not on hold, budget checked and is not involved in another PO Build process. There are three options to choose from the Select Req Lines:

1. Req Lines
2. RFQ Not Required
3. RFQ Required

Select the appropriate option from the Select Req Lines field. Check (✓) the Specific Requisition and enter the Requisition number. Also, check (✓) the Copy all Req/RFQ lines then select OK.

NOTE: The Selection Criteria and Copy Criteria changes when the Copy From data field is changed. The two values are Requisition and Request For Quotes

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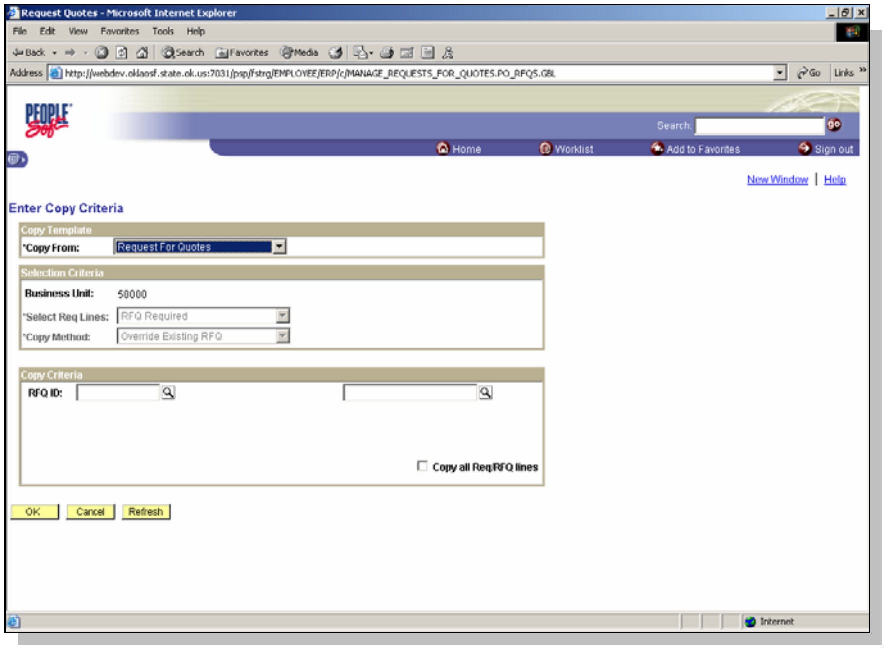
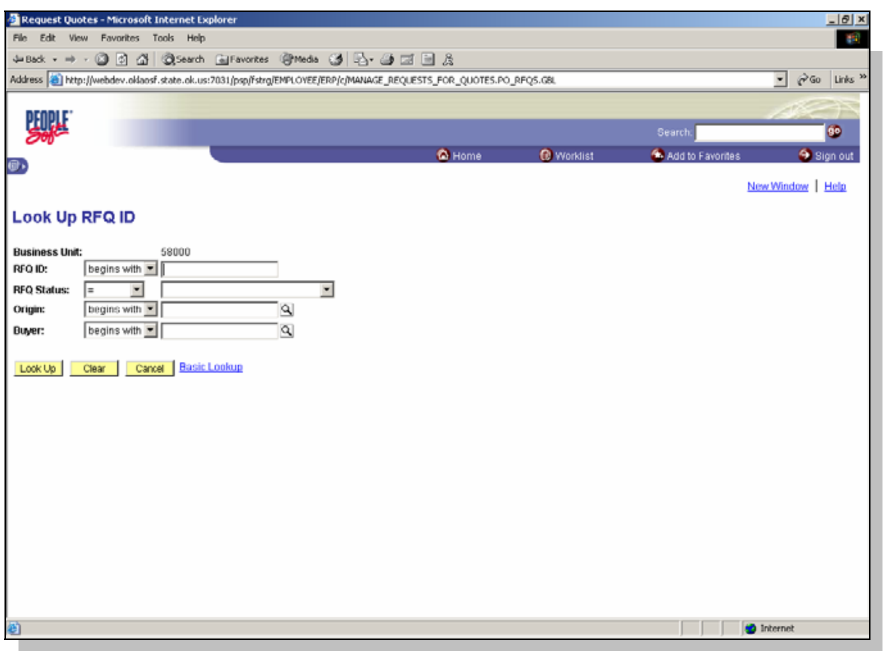
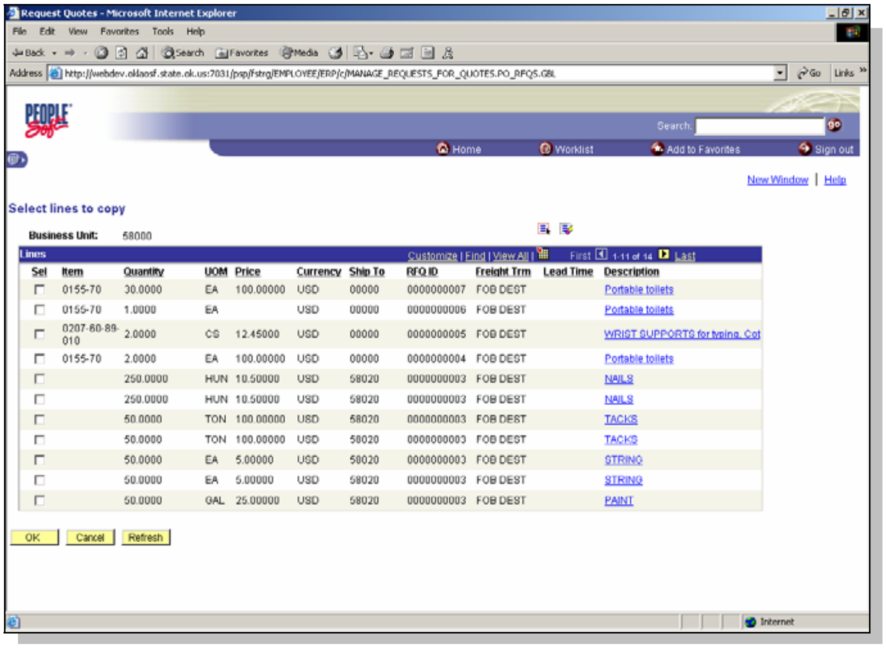
Copy From Request For Quote



If you know the RFQ ID enter it and check (✓) the Copy all REQ/RFQ lines then click the OK button. If you do not know the RFQ ID select the lookup icon and the Look Up RFQ ID screen is displayed.



Enter the appropriate information and click the Look Up button. The Select Lines to Copy page is displayed. Select the RFQ from the Select Lines to Copy page and click the OK button.



Sel	Item	Quantity	UOM	Price	Currency	Ship To	RFQ ID	Freight Trm	Lead Time	Description
	0155-70	30.0000	EA	100.00000	USD	00000	0000000007	FOB DEST		Portable toilets
	0155-70	1.0000	EA		USD	00000	0000000006	FOB DEST		Portable toilets
	0207-60-89-010	2.0000	CS	12.45000	USD	00000	0000000005	FOB DEST		WRIST SUPPORTS for typing. Cot
	0155-70	2.0000	EA	100.00000	USD	00000	0000000004	FOB DEST		Portable toilets
		250.0000	HUN	10.50000	USD	58020	0000000003	FOB DEST		NAILS
		250.0000	HUN	10.50000	USD	58020	0000000003	FOB DEST		NAILS
		50.0000	TON	100.00000	USD	58020	0000000003	FOB DEST		TACKS
		50.0000	TON	100.00000	USD	58020	0000000003	FOB DEST		TACKS
		50.0000	EA	5.00000	USD	58020	0000000003	FOB DEST		STRING
		50.0000	EA	5.00000	USD	58020	0000000003	FOB DEST		STRING
		50.0000	GAL	25.00000	USD	58020	0000000003	FOB DEST		PAINT

STEP 3 – DISPATCH A REQUEST FOR QUOTE

OVERVIEW

RFQs can be dispatched in several different ways. The following options are available:

1. Email
2. Fax
3. Phone
4. Print

Follow the navigation below to Dispatch a RFQ

Navigation: Purchasing > Requests for Quotes > Dispatch Quotes:

If you know the Run Control ID enter it in the dialog box below and click the Search button. Then select the Run Control ID this will take you to the Dispatch Quote Forms page.

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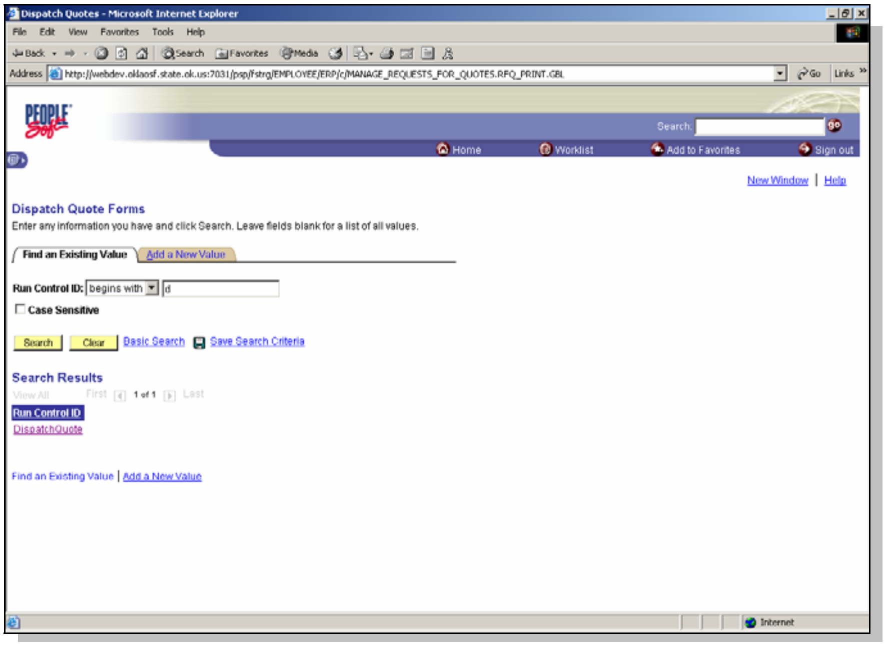
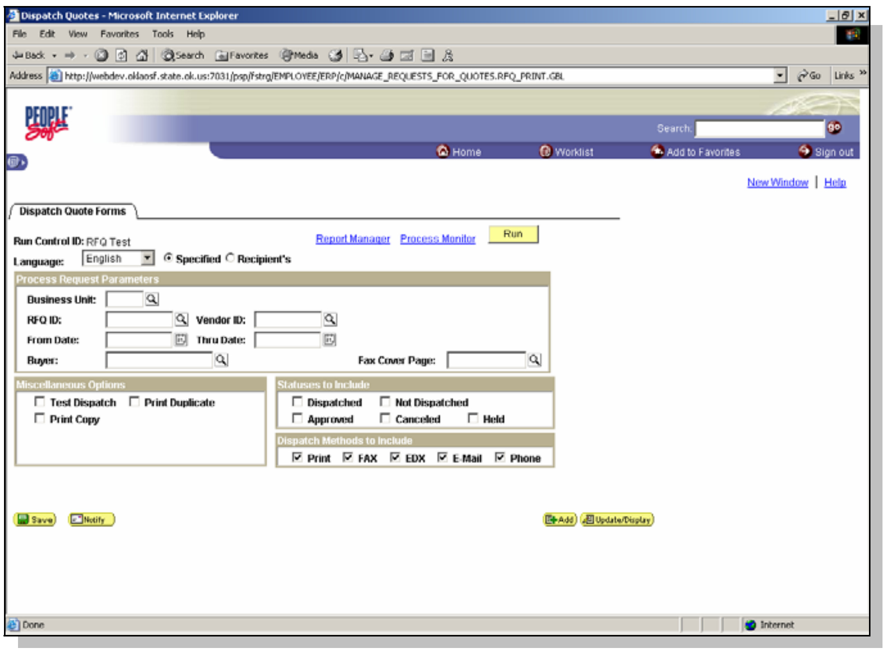


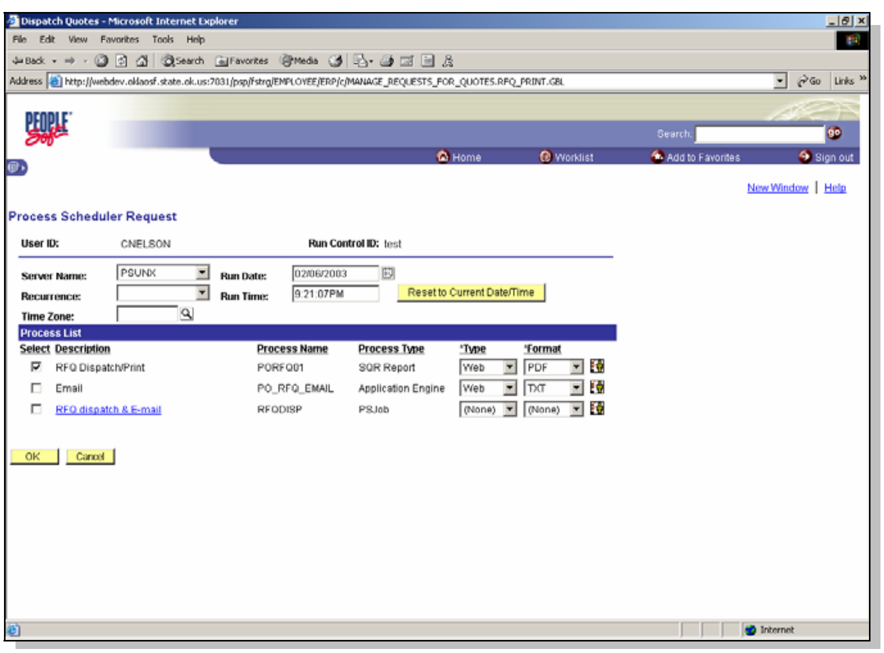
If performing this process for the first time, users must create their own run control by selecting Add a New Value tab. Enter a Run Control ID in all **CAPS** then select the Add button this will take you to the Dispatch Quote Forms page.

Dispatch Quote Forms

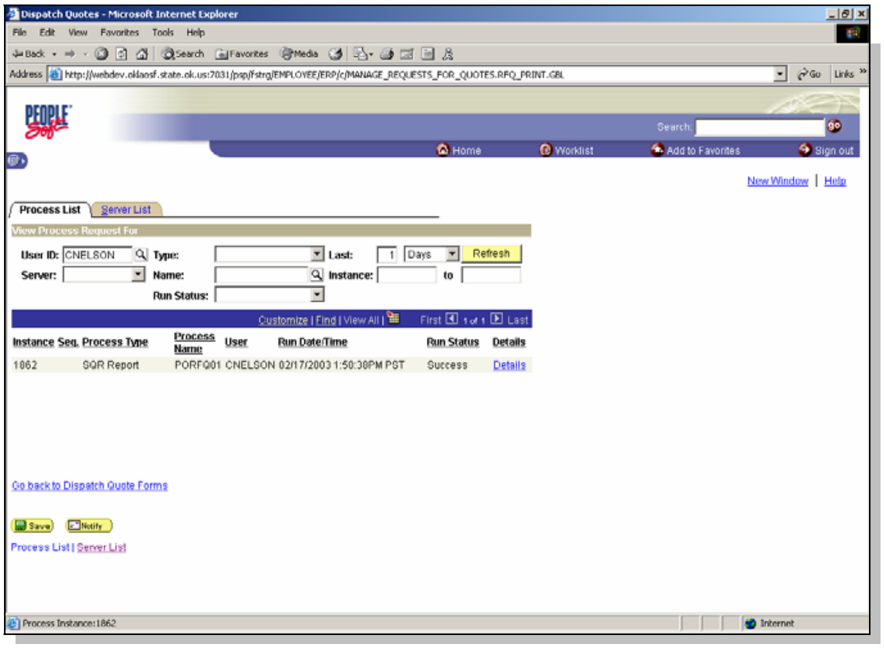
Enter the Business Unit and RFQ ID of the RFQ to be dispatched. After your selection has been made, click the Save button. Then click the Run button, which takes you to the Process Scheduler Request page.



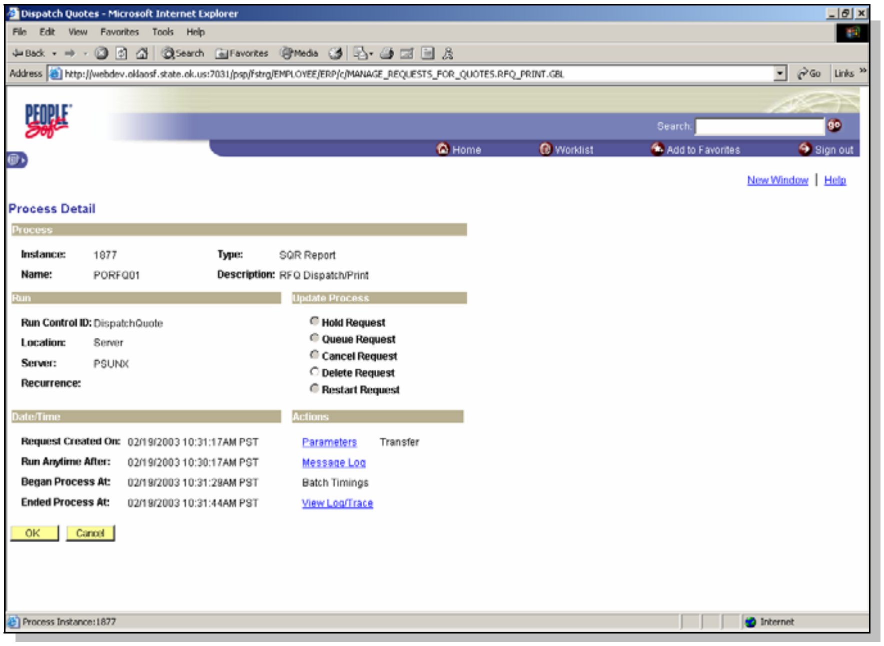
Process Scheduler Request



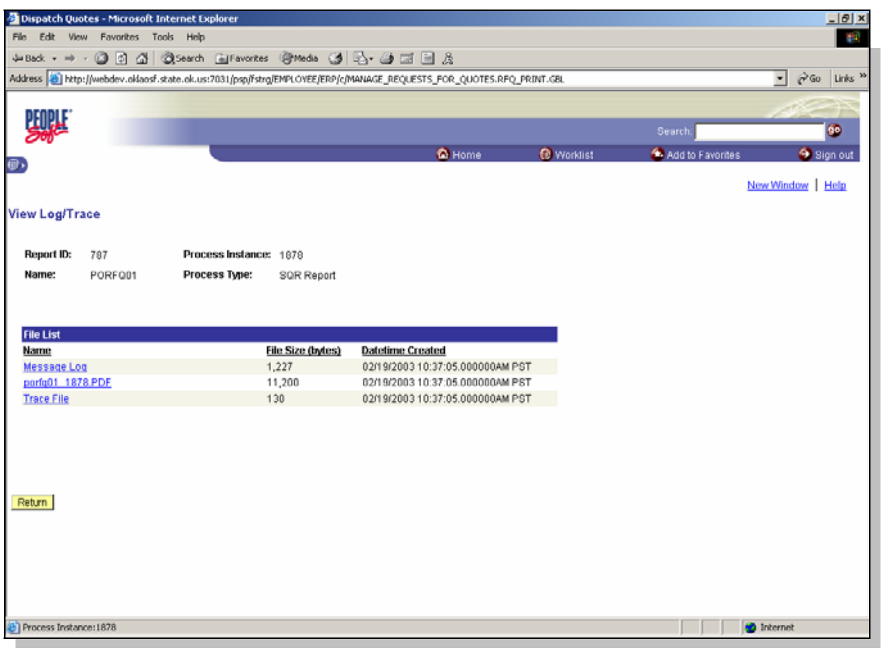
Set Server Name to "PSUNX" and select "RFQ Dispatch/Print. Click OK to run the Dispatch process. The Process Scheduler Request page is displayed. Select the Process Monitor link. The Process list page is displayed.



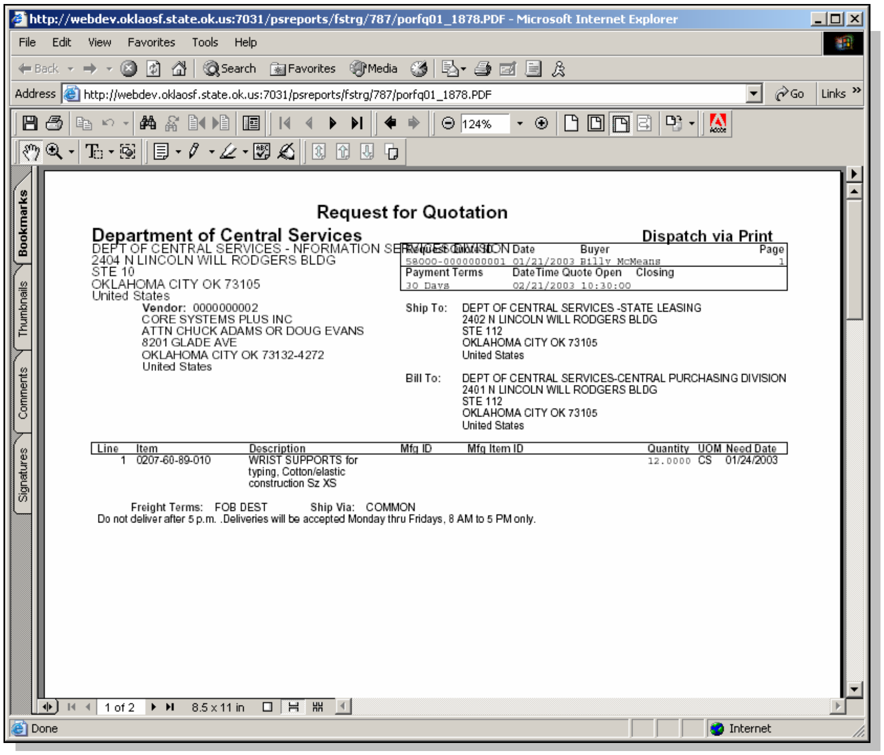
Click the Refresh button to see the Run Status. When the Run Status shows **Success** click the Details link to view the Parameters, Message Log, and View Log/Trace information. The Process Detail page is displayed.



Click the View Log/Trace link. The View Log/Trace page is displayed.



Click the file name that has a .PDF extension to view the RFQ report (Example: porfq01 1878.PDF). The following report is displayed.



You can print the report or view the report online. When finished viewing the report close the report by closing the browser window. Click the Return button from the View Log/Trace page to return to the Process Detail page. Click the OK button to return to the Process List page. Click the Go back to Dispatch Quote Forms link to return to the Dispatch Quote Forms.

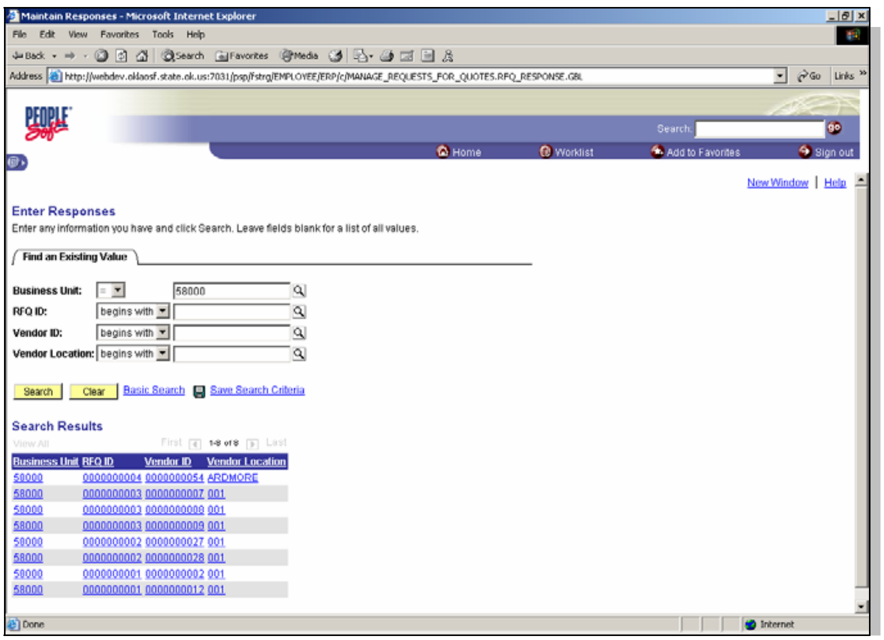
STEP 4 - ENTER VENDOR RESPONSES

OVERVIEW

Enter Vendors responses for analysis on the Enter Responses page shown below. This will simplify the decision-making when determining the best vendor to award the quote. This page displays the Business Unit, RFQ ID, and vendor ID according to selection criteria. Use this page to enter some general information regarding a specific vendor's response to the RFQ. This information is contained on the Header Page.

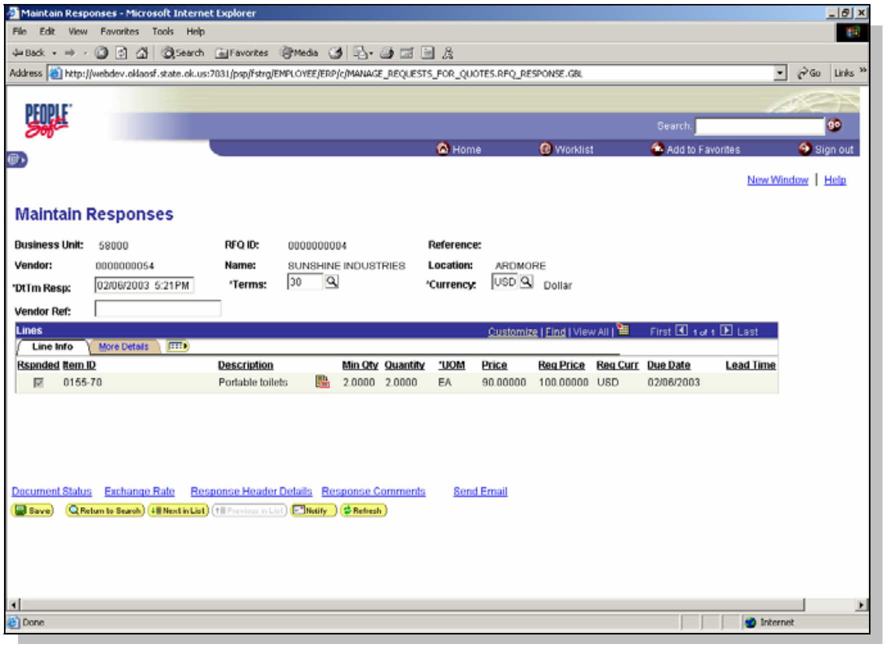
Follow the navigation below to add or view a RFQ.

Navigation: Purchasing > Requests for Quotes > Maintain Responses:



Enter the Business Unit, and or RFQ ID number or enter the Business Unit and click the Search button. The Search Results are displayed. Select the Vendor ID or RFQ ID for which a response is to be entered. This will take you to the Maintain Responses page.

MAINTAIN RESPONSES



On the Line Info tab the RFQ Response lines are used to enter information about each RFQ line to which the vendor responded.

DtTm Resp – Defaults to the current date and time. Enter actual time if different.

Terms - Defaults from the RFQ header and is the payment terms of the vendor response. Information can be changed if needed.

Currency – The currency of the vendor response.

Responded – If selected this will indicate the vendor has responded and the RFQ can be awarded. Once the checkbox is activated the fields in the scroll area can be populated with data. If the RFQ has been awarded this field will not be available for selection.

Item ID – The Commodity Code. The description will be displayed in the field to the right.

Price - Enter the price the vendor has quoted for the item.

Req Price – Displays the requisition price for the item. This field will only be populated if the line item was copied from a requisition.

Lead Time – Enter the number or days the vendor requires for lead-time on orders for this item and quantity if applicable.

Min Qty - If the vendor stated orders would be limited to a certain quantity, enter that quantity into the field.

UOM – The unit of measure used for ordering this item from the vendor.

More Details Tab – You can enter vendor item detail and manufacturer's item detail information on the More Details. You also can enter Ship Via, Ship To, and Freight Terms

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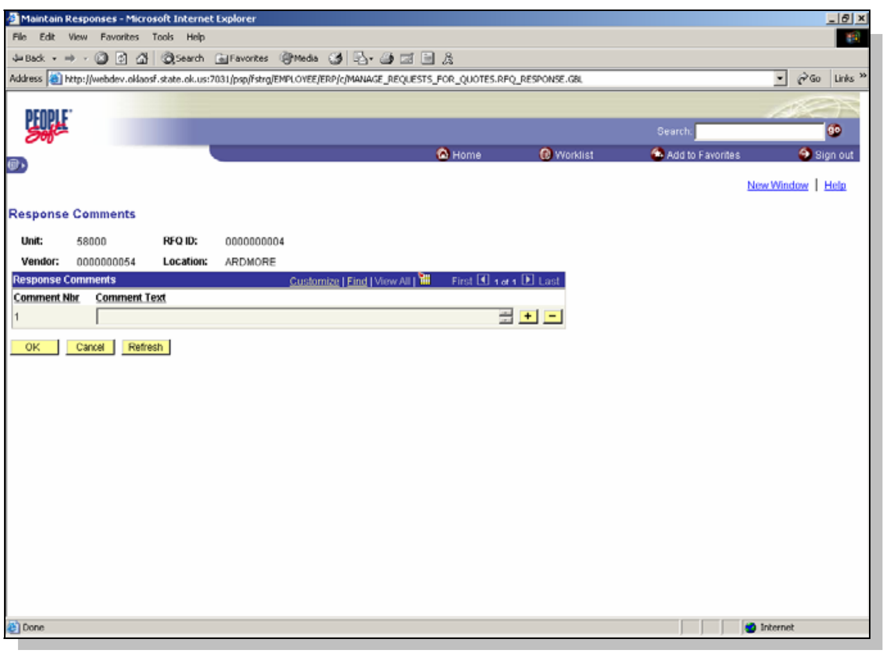
NOTE: When entering Vendor responses be sure to check (✓) the Responded checkbox on the Line Info tab.

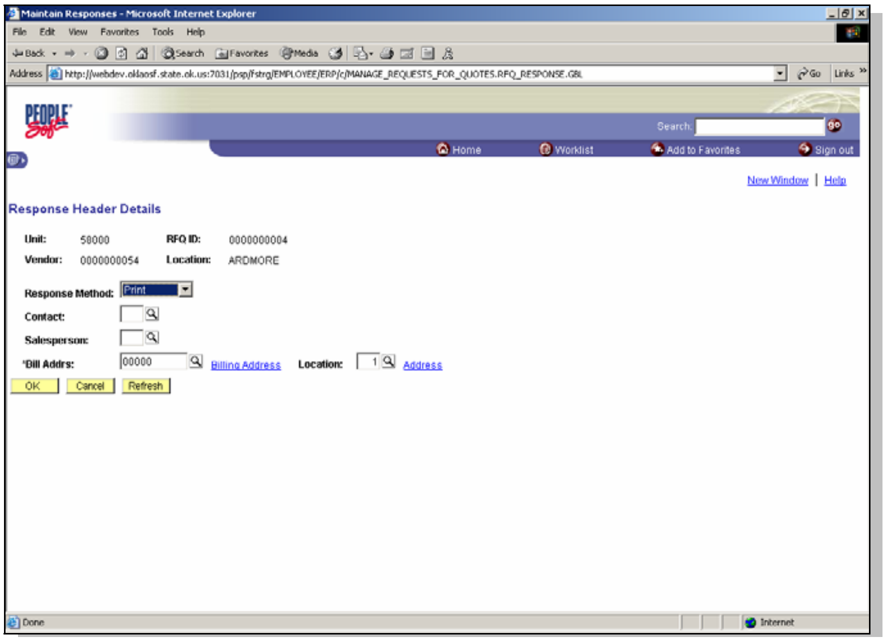
Response Comments Page

This page is used to note any vendor comments, or to provide comments the Buyer may have regarding the vendor's response. Access this page by clicking the Response Comments link. Enter the information in the Comment Text field. If additional comments are required click the + button. When finished click the OK button.



Response Header Details Page

This page is used to note contact and sales details. Access this page by clicking the Response Header Details link.



Response Method - Select the manner in which the response was received. Values are:

- EDX
- Fax
- Phone
- Print

When finished click the  button.

Step 5 - Award the RFQ to a Vendor

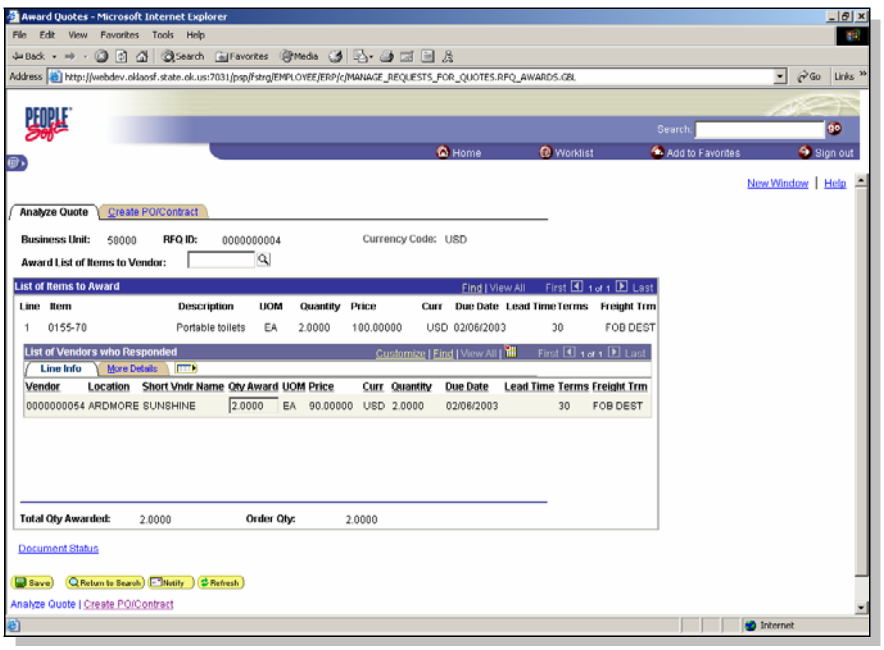
Overview

The system provides an on-line analysis tool of vendor responses to RFQs. The Analysis and Awards page displays the RFQ Lines one at a time and lists all the vendors from whom quotes have been entered for each Line item. The page allows the lines to be sorted by Vendor, Location, UOM, Price, Due Date, Lead Time, and Terms.

Follow the navigation below to add or view a RFQ.

Navigation: Purchasing > Requests for Quotes > Award Quotes:

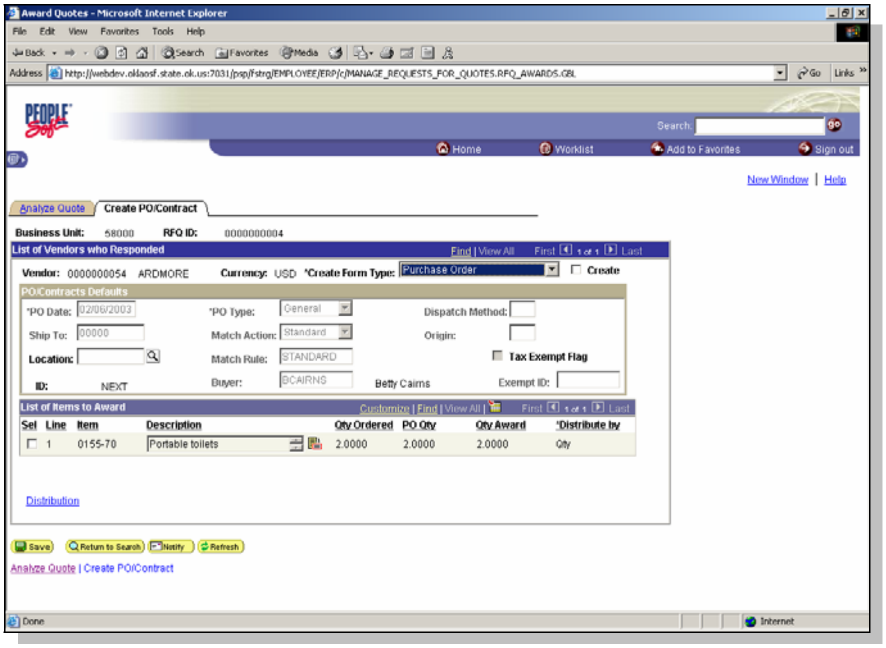
Analyze Quote



The Buyer should scroll though each line and award amounts to vendors. To award the entire RFQ to one vendor enter a value in the **Award List of Items to Vendor** field. Comments may be entered in the More Details tab. Once each Line has been fully awarded, the Buyer must then go to Create PO / Contract.

STEP 6 - AWARD PURCHASE ORDER/CONTRACT

CREATE PO/CONTRACT



The Buyer can see the results of the award for each vendor. Once the Buyer is satisfied with the award, they need to check the **Sel** checkbox for each vendor that has been awarded quantities.

The 

option should be set to Purchase Order and the **Create** checkbox should be checked (✓). The purchase orders and contracts you create here are placed in the PO staging area, waiting to be generated through the PO Build background process. The contracts you create here and the contract release defaults for the request for quote business unit are generated automatically after you save the data from this page.

Once saved, a PO can be created from this RFQ using the PO Calc, PO Create and PO Dispatch process (see Training Manual Purchasing P110) for purchase orders.

NOTE: If the award is going to a contract change the **Create Form Type** to Contract Response Currency.

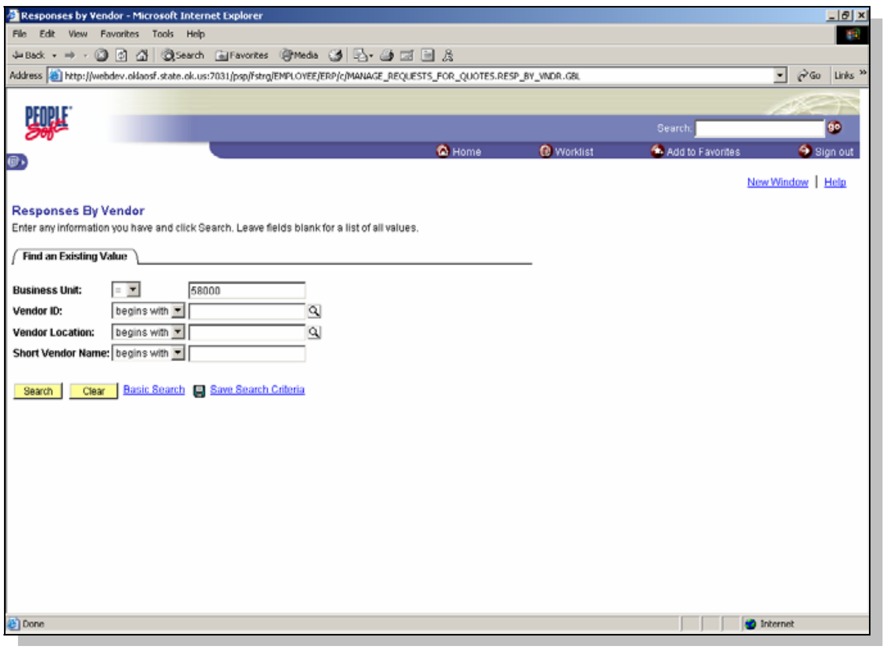
STEP 7 - INQUIRING ON RFQ (RESPONSE BY VENDOR)

OVERVIEW

Inquire on all the requests for quotes sent to a specific vendor.

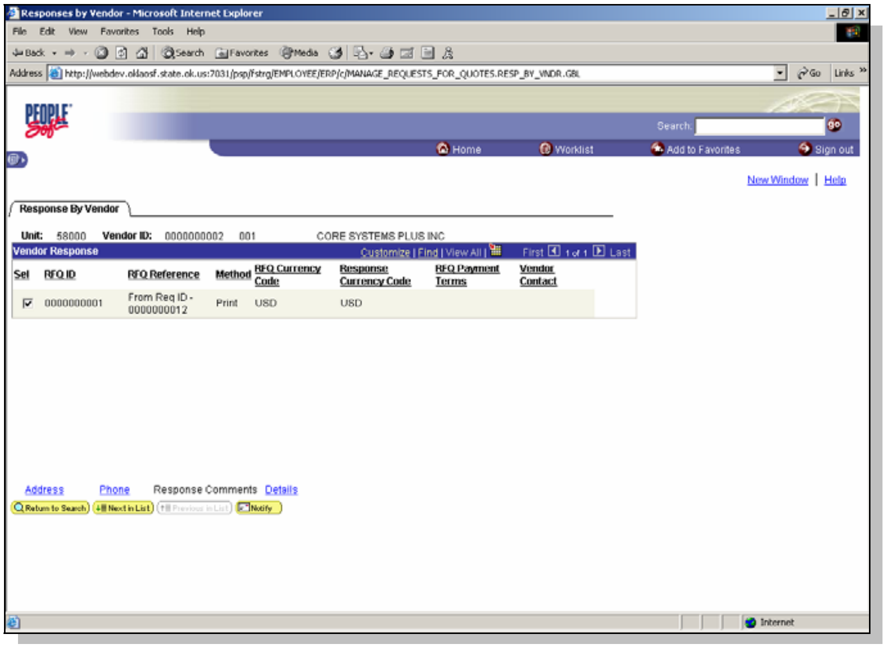
Follow the navigation below to review all the responses submitted by a specific vendor.

Navigation: Purchasing > Requests for Quotes > Review RFQ Information > Responses by Vendor:



Enter the Vendor ID or select the Search button to select the appropriate vendor. After selecting the vendor you will be taken to the Response by Vendor page.

RESPONSE BY VENDOR



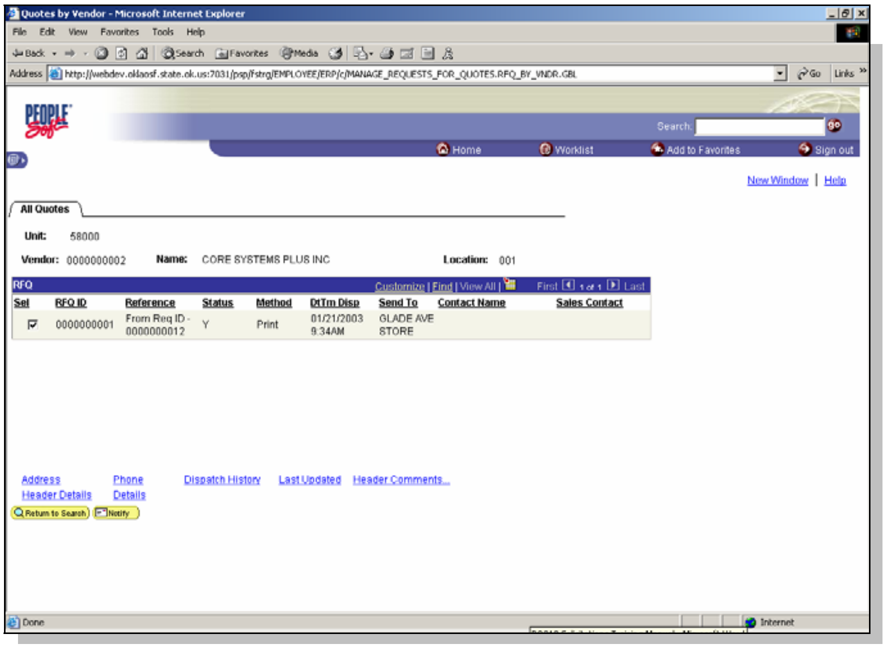
When the desired RFQ ID is displayed and selected, click on the Details link to display the line information for that RFQ ID.

Of the three inquiries, **Responses By Vendor** is probably the most useful. The other two inquiries are: Quotes By Vendor and Vendors By Quote.

Quotes By Vendor

Follow the navigation below to review all Quotes by Vendor.

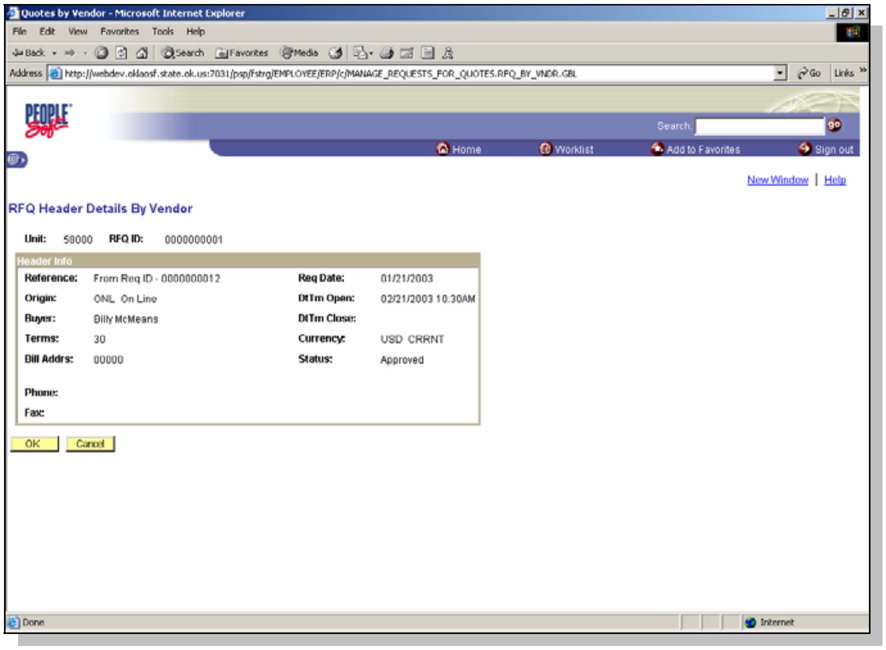
Navigation: Purchasing > Requests for Quotes > Review RFQ Information > Quotes by Vendor:



In order to view the hyper links at the bottom of the page you must first check (✓) the checkbox at the left of the line item.

Click the Header Details link to view the RFQ Header Details By Vendor.

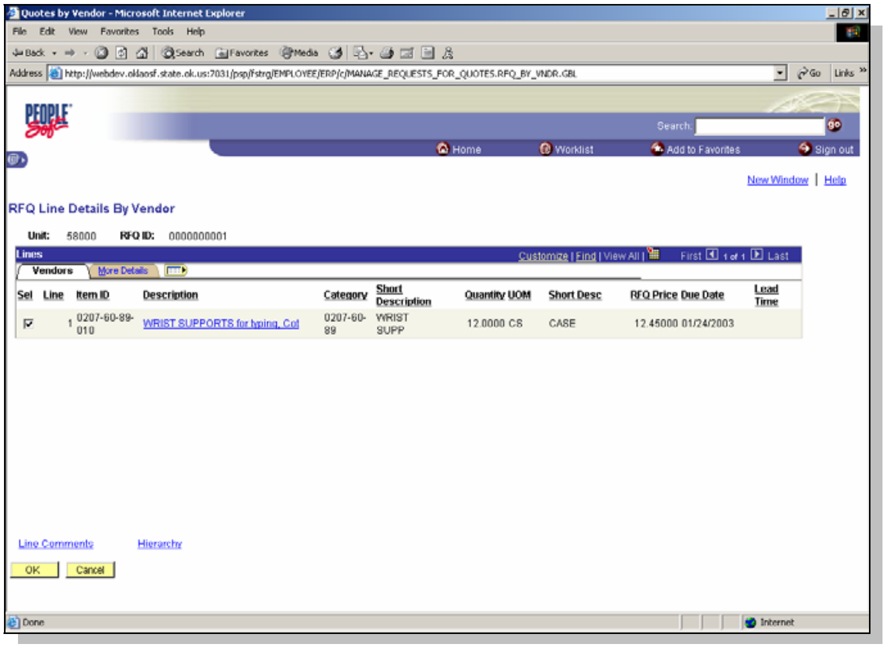
RFQ HEADER DETAILS BY VENDOR



RFQ Header Details will allow you to view additional information regarding the RFQ by vendor. Select the OK button to return to the All Quotes Inquiry page.

Click the Details link to view the RFQ Lines Details By Vendor page.

RFQ Line Details By Vendor

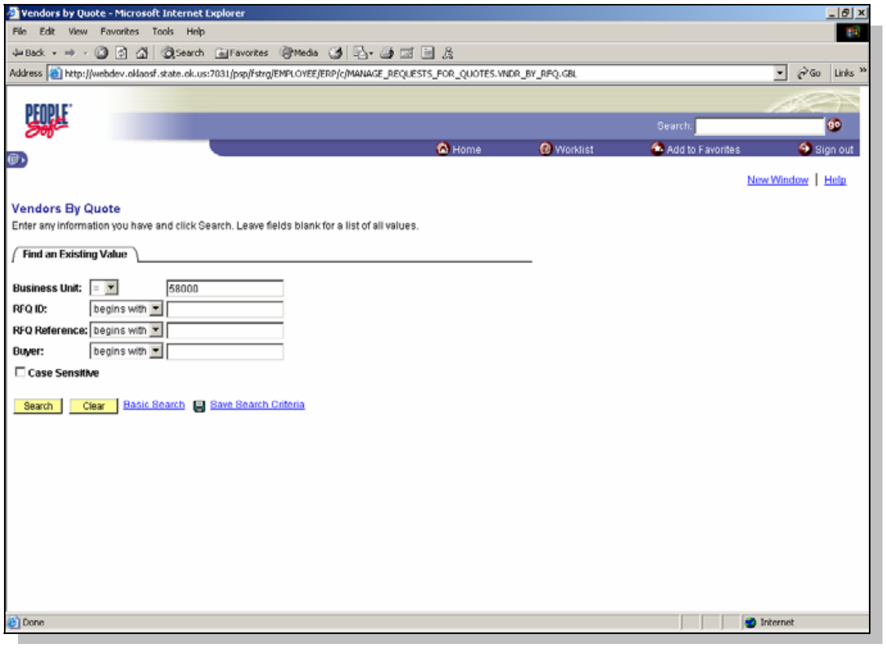


RFQ Line Details will allow you to view the RFQ line information regarding the vendor. Select the OK button to return to the All Quotes Inquiry page.

Follow the navigation below to review Vendors By Quote.

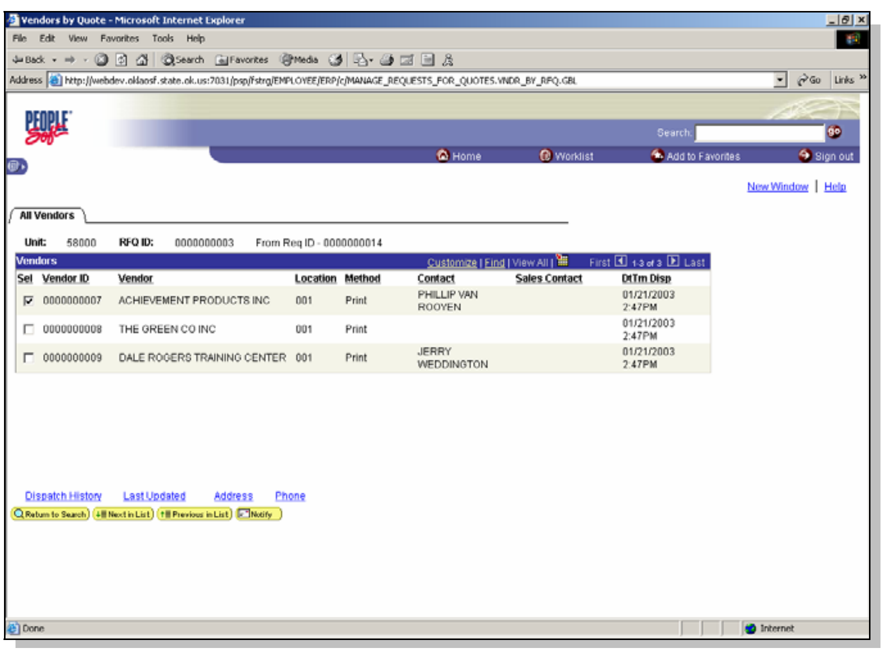
Navigation: Purchasing > Requests for Quotes > Review RFQ Information > Vendors by Quote:

VENDORS BY QUOTE



Enter the RFQ ID or select the Search button to select the appropriate RFQ ID. After selecting the RFQ ID you will be taken to the All Vendors page.

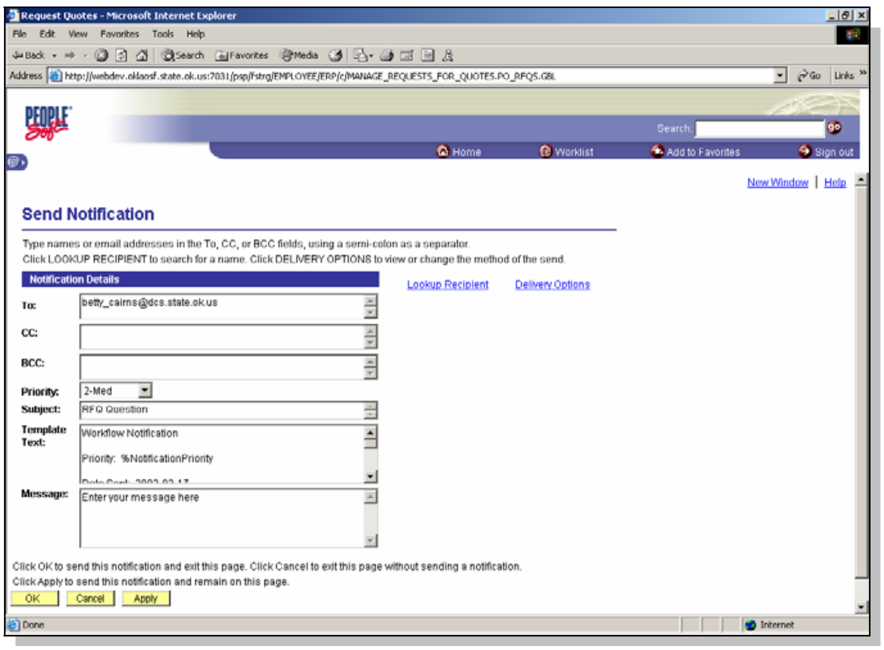
ALL VENDORS



Email Notifications

button – This button is available on many pages. It transfers you to the following page where you can send e-mail or worklist notification to individuals regarding information or questions about the page you are on. The send notification will provide a link to the PeopleSoft page you are on.

Send Notifications Details



TO: / CC: / BCC: – Enter the e-mail addresses of the individuals.

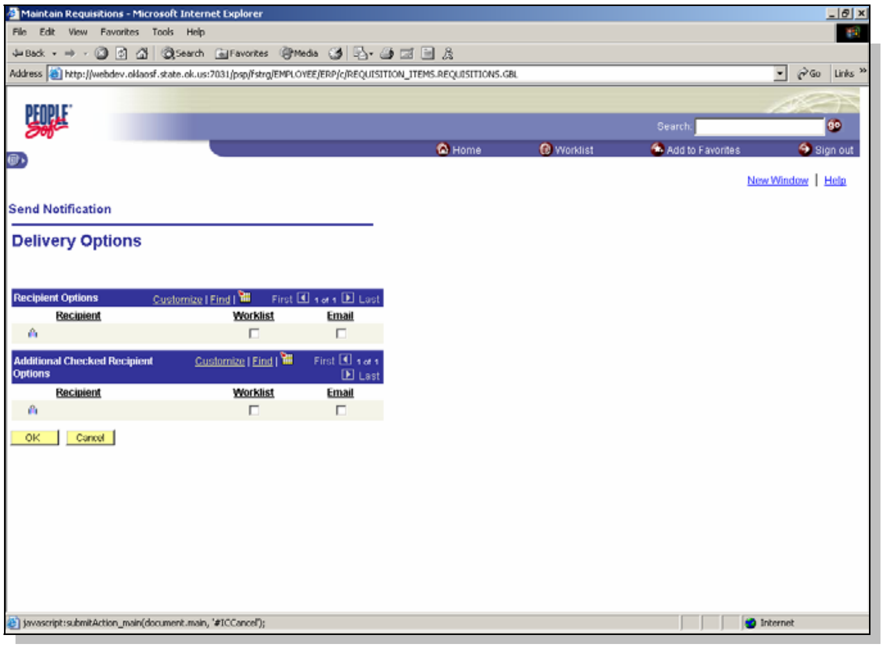
Priority – Select the priority level: Low, Medium or High.

Template – DO NOT CHANGE

Message – Type in your message.

Send Notifications Delivery Options

Press the Delivery Options link and select whether you want this message to go to the recipient's Worklist or E-mail.



Click the OK button to return to the Send Notification Detail page. Click the OK button to send the email and return to the original PeopleSoft page you were viewing.

EXERCISES

The following exercises are designed to review your understanding of the material contained in this manual. Please use the values provided in the exercise. The answers will be reviewed during class.

EXERCISE – 1 (COPY REQUISITION TO CREATE RFQ)

EXERCISE – 2 (COPY FROM REQUISITION, ENTER RESPONSES AND AWARD TO SINGLE VENDOR)

EXERCISE – 3 (CREATE DIRECT RFQ)

EXERCISE – 4 (CREATE DIRECT RFQ, ENTER RESPONSES)

EXERCISE – 5 (CREATE DIRECT RFQ, AWARD TO MULTIPLE VENDORS)