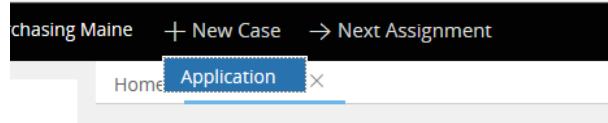
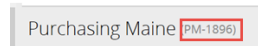


# HOW TO DO A RFI DOCUMENT

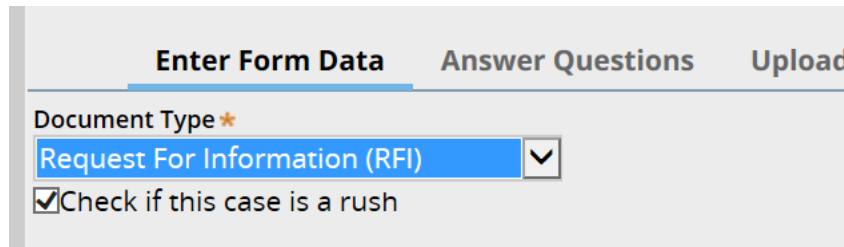
- 1) Log into the purchasing me application
- 2) Click on new case and then application



You will see that a case number is established for your document, in this case it is pm-1896. Your case number will be located next to "Purchasing Maine" in the upper left-hand corner of your case.

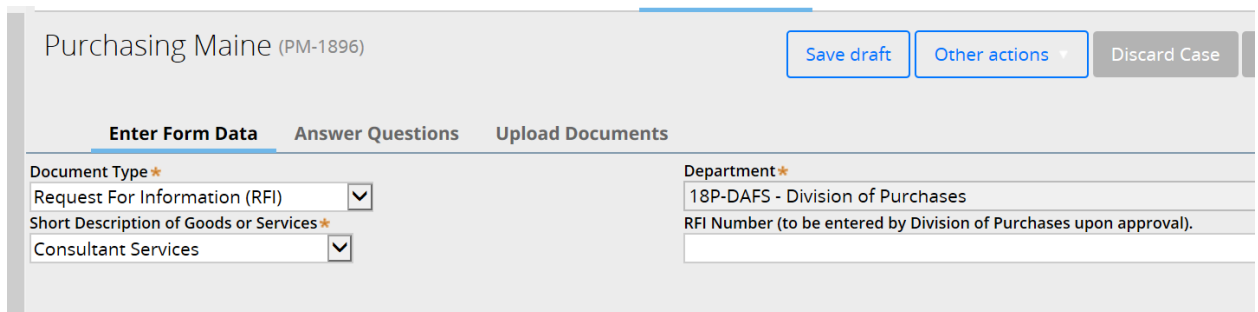


- 3) Fill out the following fields:
  - a. Under document type, select "Request For Information" (RFI).
  - b. Department (select your department by putting in either your agency number or department name.)
  - c. If applicable you can check the "Check if this case is a rush" button



- d. Short Description of Goods or Services (use drop down to select your service)

**POINT OF INFORMATION - WHEN PICKING YOUR SERVICE, IF YOU DO NOT SEE ANY SERVICE LISTED THAT WOULD APPLY TO THE SERVICE YOU ARE OBTAINING, THEN SELECT "Other" AND DIRECTLY ACROSS, A FIELD WILL APPEAR WHERE YOU CAN ENTER IN THE SERVICE.**



Purchasing Maine (PM-1896) Save draft Other actions Discard Case

**Enter Form Data** Answer Questions Upload Documents

Document Type\*  
Request For Information (RFI) ▼

Short Description of Goods or Services\*  
Consultant Services ▼

Department\*  
18P-DAFS - Division of Purchases

RFI Number (to be entered by Division of Purchases upon approval).  
\_\_\_\_\_

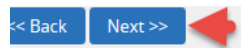
NOW CLICK THE "Next" BUTTON.

- 4) You will now be at the Answer Questions page. For this type of document there will be no questions to answer – it will just simply tell you what form to use. You can now click on the Next button.

Purchasing Maine (PM-1896) Save draft Other actions ▾

**Enter Form Data** **Answer Questions** **Upload Documents**

There is no additional information required for your submittal. Please select Next to upload your RFI document.



- 5) THIS NEXT PAGE IS WHERE YOU WOULD ATTACH YOUR RFI DOCUMENT – CLICK THE ATTACHMENT BUTTON, THEN SELECT ATTACH FILE

**NOTE: Please keep the file names of attachments to less than 64 characters AND with no special characters**

**Enter Form Data** **Answer Questions** **Upload Documents**

**Before uploading any documents, ensure that you have all necessary signatures for each document.**

**You are required to submit the following documents:**

You have indicated that you would like to submit an RFI document. Please upload the document as an attachment below.

**Attachments**



[+ Attach new](#)

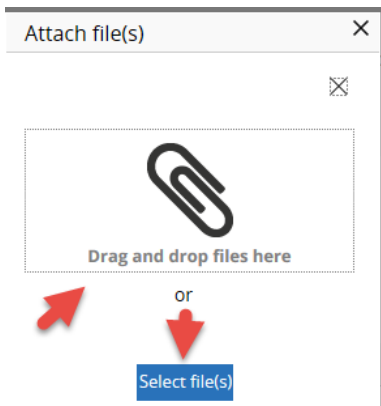
**File from device** 

Do you have any exceptions to the State of Maine standard contract terms and conditions? \*

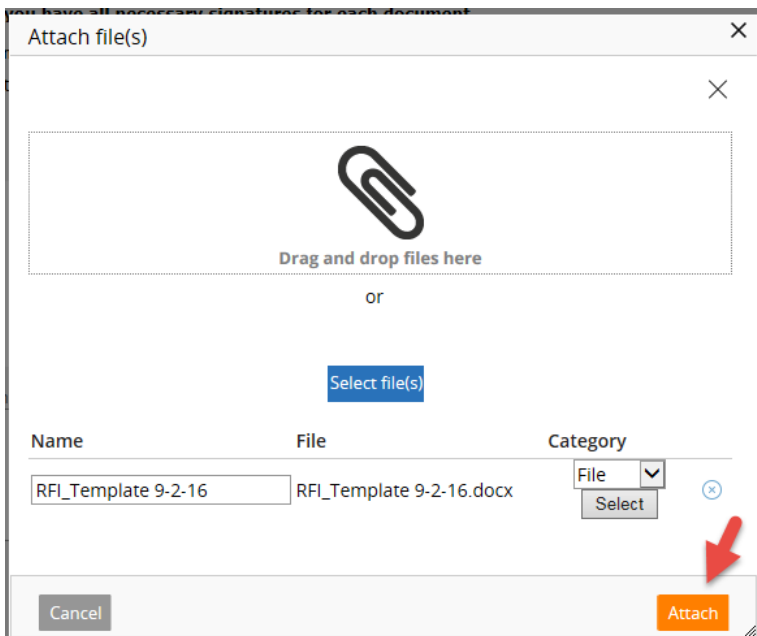
Yes

No

6) YOU CAN CHOOSE TO EITHER DRAG AND DROP YOUR FILE OR TO CLICK ON “Select File(s)”

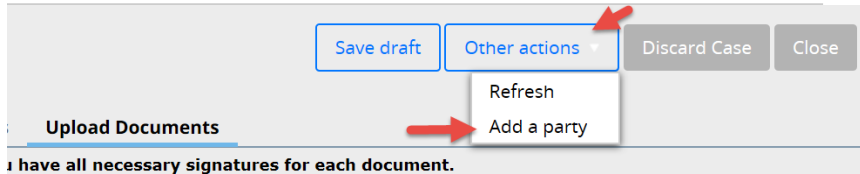


For this exercise I'm going to click on “select file(s)” which you would then find and select your documents to attach:

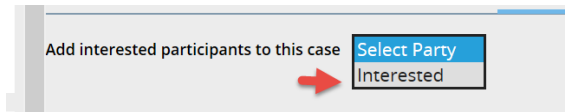


## OPTIONAL FEATURE

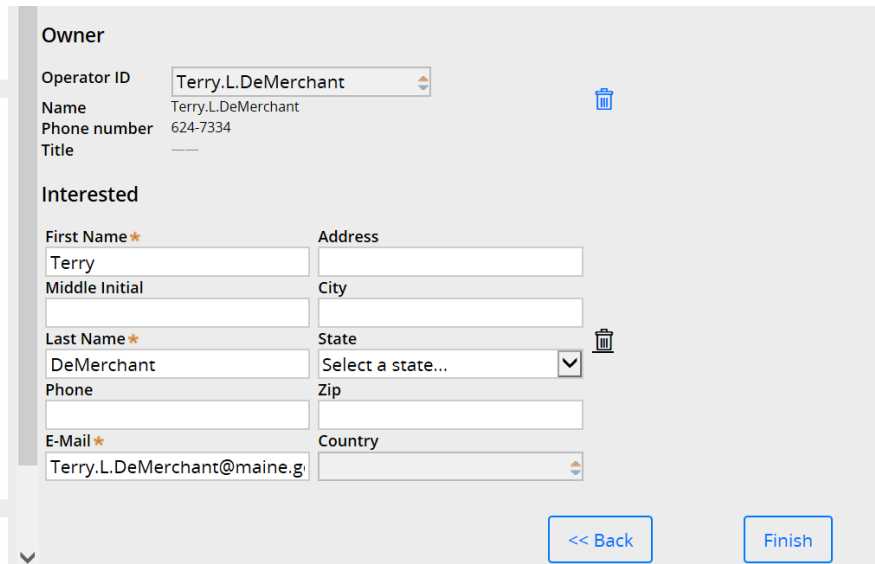
- 7) There is an “Add a party” feature that will allow you to put in a member of your workgroup so that they will receive all notification e-mails that you do. In the upper right, click on the Other actions button and choose Add a party



Under Select Party choose Interested

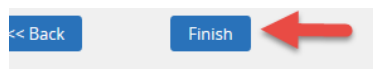


The page will open up where you can add the First Name, Last Name and E-mail. When done you would click on the Finish button.



A screenshot of a software interface showing a form for adding a party. The form is titled 'Owner' and 'Interested'. Under 'Owner', there are fields for 'Operator ID' (Terry.L.DeMerchant), 'Name' (Terry.L.DeMerchant), 'Phone number' (624-7334), and 'Title'. Under 'Interested', there are fields for 'First Name' (Terry), 'Middle Initial', 'Last Name' (DeMerchant), 'Phone', 'E-Mail' (Terry.L.DeMerchant@maine.g), 'Address', 'City', 'State' (Select a state...), 'Zip', and 'Country'. There are also buttons for '<< Back' and 'Finish'.

YOU ARE ALL SET TO CLICK THE “Finish” BUTTON



8) You will then see the status of submitted, which means it has routed to the Division of Procurement Services and the case is closed to you for editing.

The screenshot displays a web interface for case management. At the top, there are navigation tabs: **Overview** (selected), Information, Attachments, Tools, and Audit. Below the tabs is the **Case details** section, which is organized into three columns. The first column contains: **Case ID** (PM-1896), **Created** (5 minutes ago), and **Created by** (Terry.L.DeMerchant). The second column contains: **Urgency** (10), **Goal** (4 days from now), and **Deadline** (7 days from now). The third column contains: **Status** (Submitted), **Last Update** (less than a minute ago), and **Last Updated By** (Terry.L.DeMerchant). A red arrow points to the **Status Submitted** text. Below this is the **Case information** section, which includes a sub-section **Enter Form Data**. This section contains two columns of form fields: **Document Type\*** (Request For Information (RFI)), **Short Description of Goods or Services\*** (Consultant Services), **Department\*** (18P-DAFS - Division of Purchases), and **RFI Number (to be entered by Division of Purchases upon a)** (with a blank input field). A red arrow points to the **Assign** button in the bottom navigation bar. The **Answer Questions** section below the form data states: "There is no additional information required for your submittal. Please select Next to upload your RFI document." The bottom navigation bar consists of a series of buttons: **Submit Application** (green, with a checkmark), **Assign** (blue, with a red arrow pointing to it), **Review**, **Disposition**, **Finalize**, and **Show all steps** (blue link).

**Overview** Information Attachments Tools Audit

**Case details**

**Case ID**  
PM-1896

**Created**  
5 minutes ago

**Created by**  
Terry.L.DeMerchant

**Urgency**  
10

**Goal**  
4 days from now

**Deadline**  
7 days from now

**Status**  
Submitted

**Last Update**  
less than a minute ago

**Last Updated By**  
Terry.L.DeMerchant

**Case information**

**Enter Form Data**

**Document Type\***  
Request For Information (RFI)

**Short Description of Goods or Services\***  
Consultant Services

**Department\***  
18P-DAFS - Division of Purchases

**RFI Number (to be entered by Division of Purchases upon a)**  
\_\_\_\_\_

**Answer Questions**

There is no additional information required for your submittal. Please select Next to upload your RFI document.

Submit Application ✓ Assign Review Disposition Finalize Show all steps