US ARMY PEO EIS
PEO Enterprise Information Systems

ARMY CHESS 4
COMPUTER HARDWARE, ENTERPRISE SOFTWARE AND SOLUTIONS

Request for Information (RFI) Tutorial

May 2015

Introduction

- This briefing will introduce the Request for Information (RFI) process.
- ***RFI will allow the customer to request information ahead of time prior to a validated requirement.***
- Requests for Information (RFI's) must be created by using the CHESS IT e-mart https://chess.army.mil
- You will learn:
  - CHESS IT e-mart Registration
  - How to create and submit an RFI
  - How to create a draft RFI
  - How to manage your RFIs
    - Amending an RFI
    - Canceling an RFI
    - Transferring an RFI
  - How to view RFI responses from Vendors
  - How vendors view RFIs from Requestors
  - How to print an RFI
  - How to transfer an RFI into a Request for Quote (RFQ) or a Request for Proposal (RFP)

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CAUTION

Please NOTE:

- The RFI process runs best in Internet Explorer 9 or 10, Firefox, and Google Chrome.
- Note: Make sure your Internet Explorer settings are NOT in Compatibility View

mozilla Firefox | Internet Explorer 9 | Internet Explorer 10 | Google Chrome

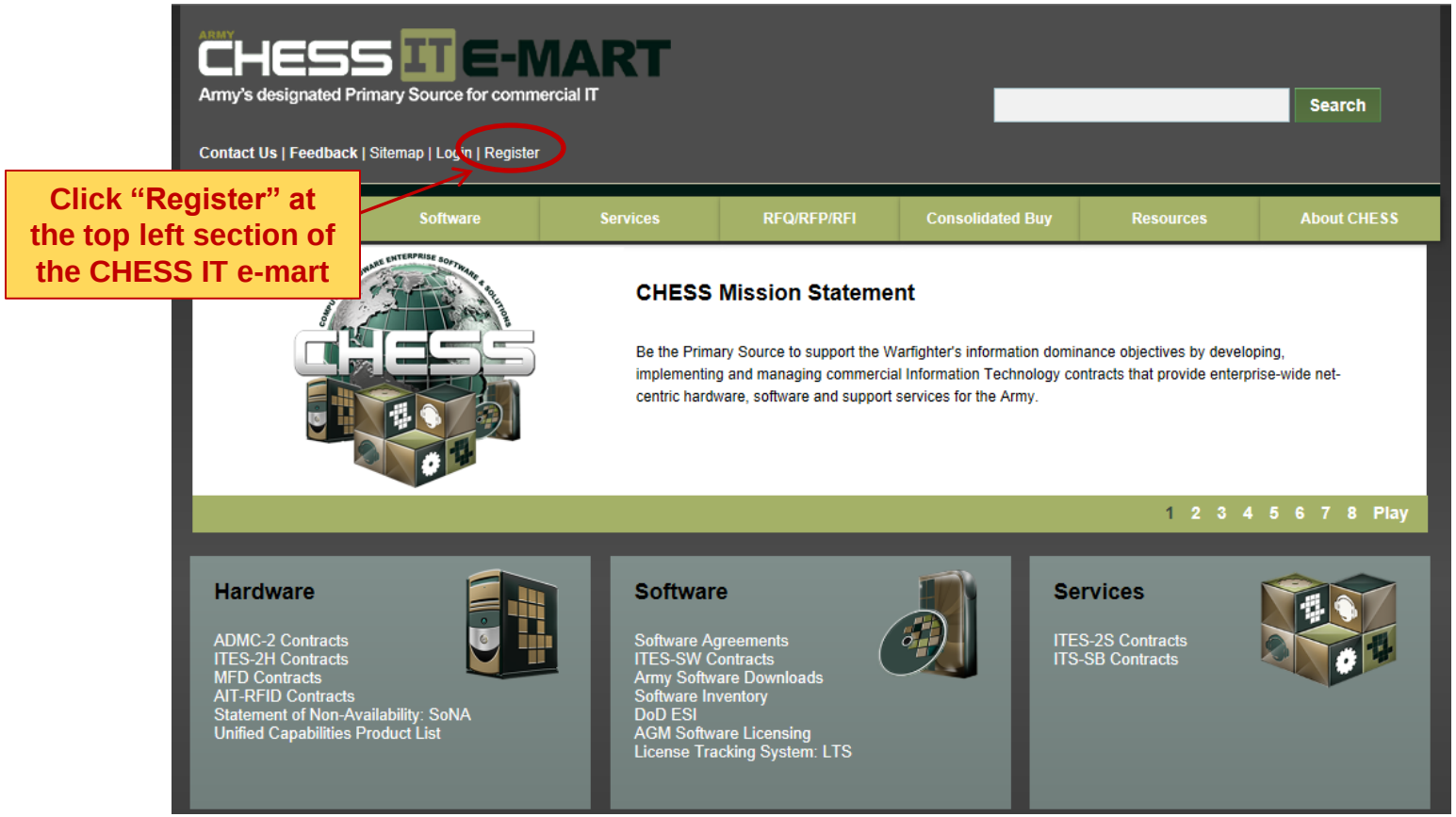
Not Recommended

Windows Internet Explorer 8

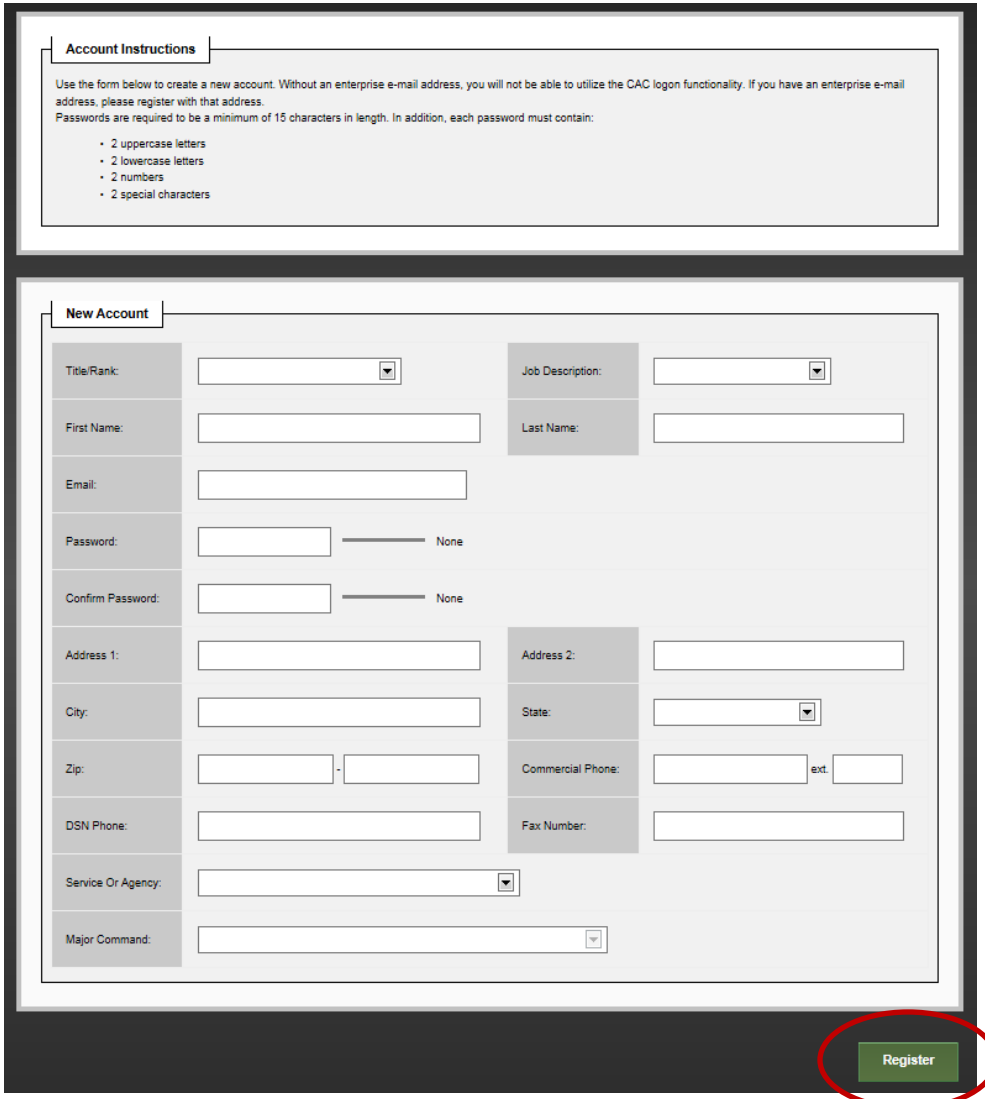
The RFI Process

Step 1 - Register

- If you do not have an account with the CHESS IT e-mart you must first register in order to gain access to the RFI Manager.

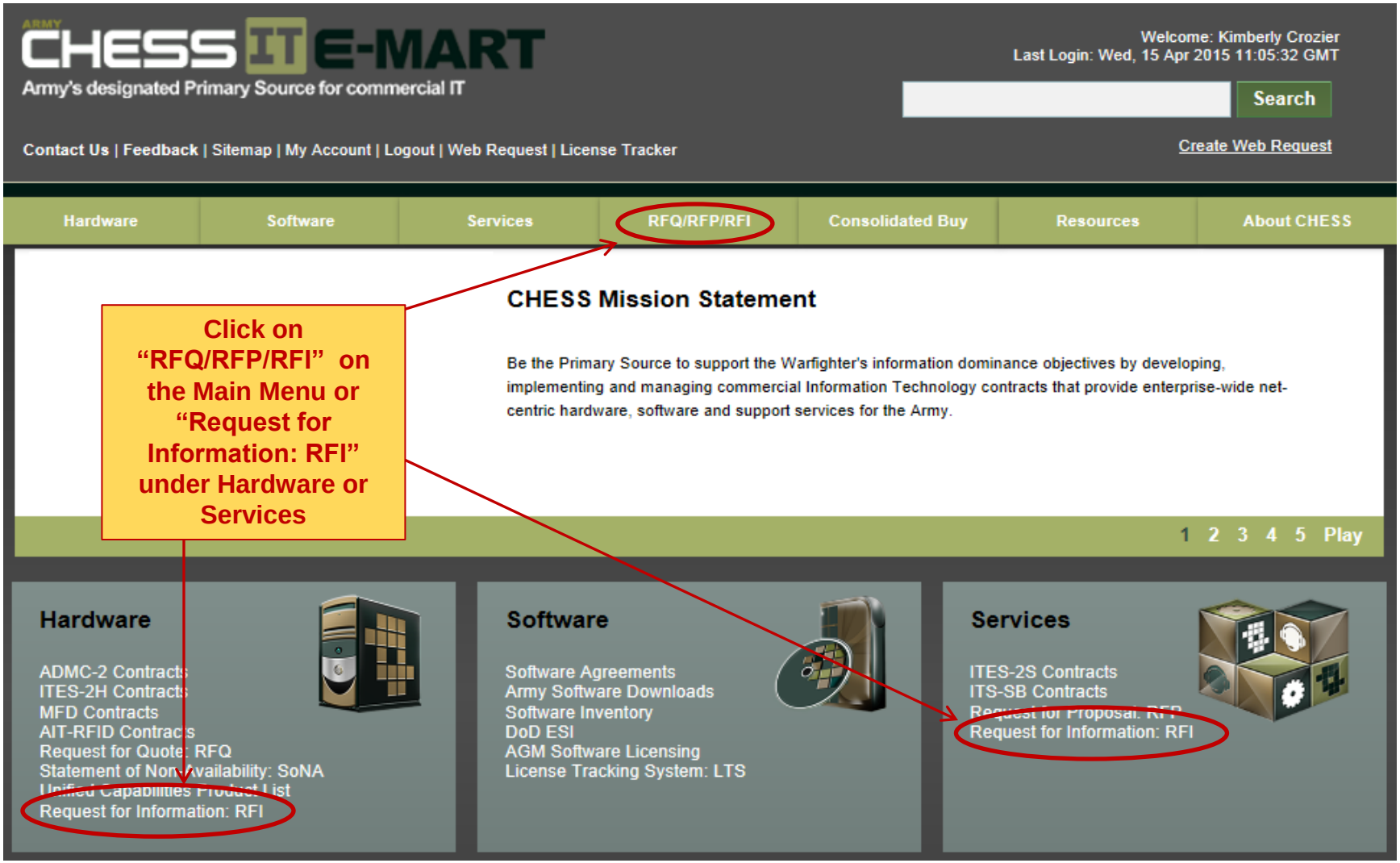


Step 2 – Create an Account



Fill out the form using a mail.mil account for your email address and select "Register"

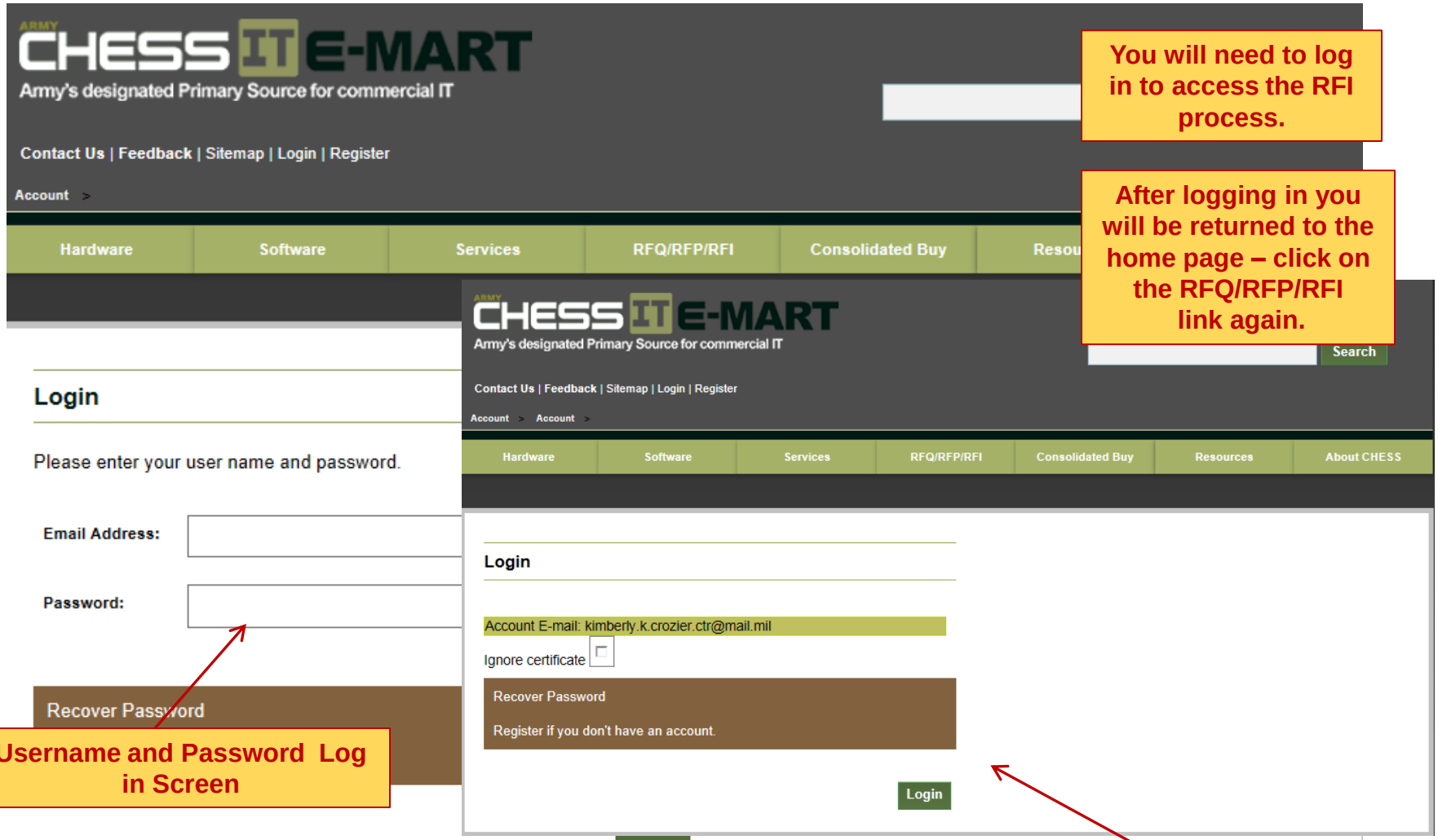
Step 3 - Access the RFI Manager



Click on "RFQ/RFP/RFI" on the Main Menu or "Request for Information: RFI" under Hardware or Services

https://chess.army.mil

Step 4 - Log into the CHESS IT e-mart



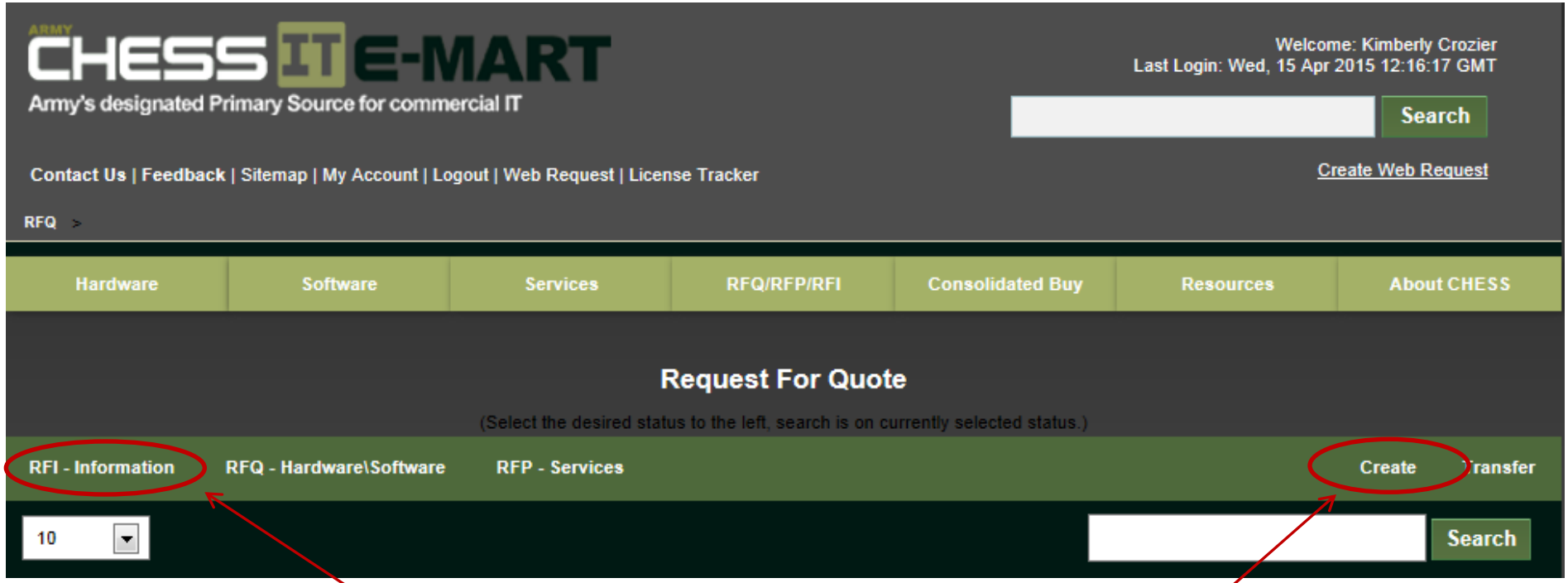
You will need to log in to access the RFI process.

After logging in you will be returned to the home page – click on the RFQ/RFP/RFI link again.

Username and Password Log in Screen

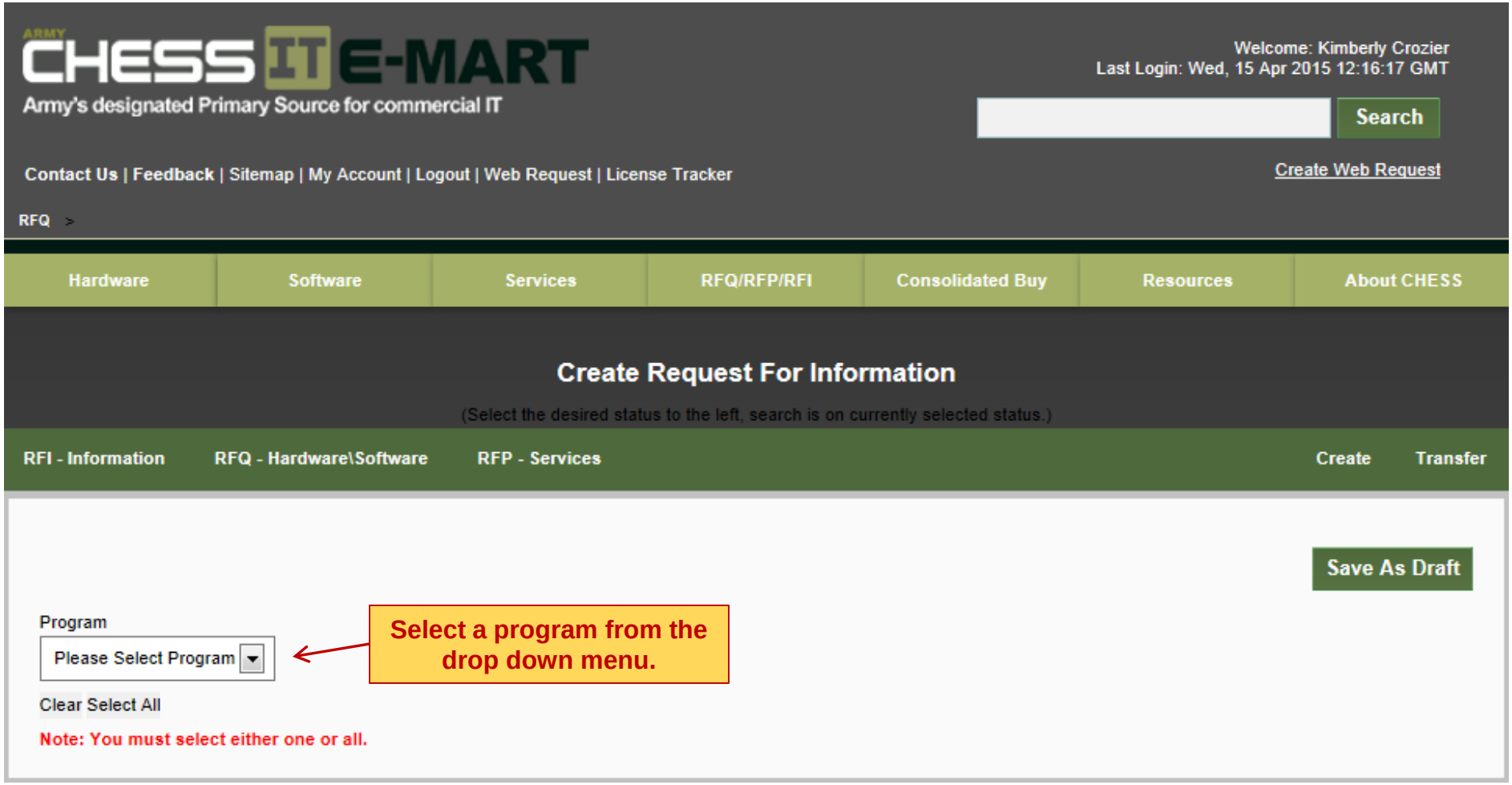
CAC Log in Screen

Step 5 - Create an RFI



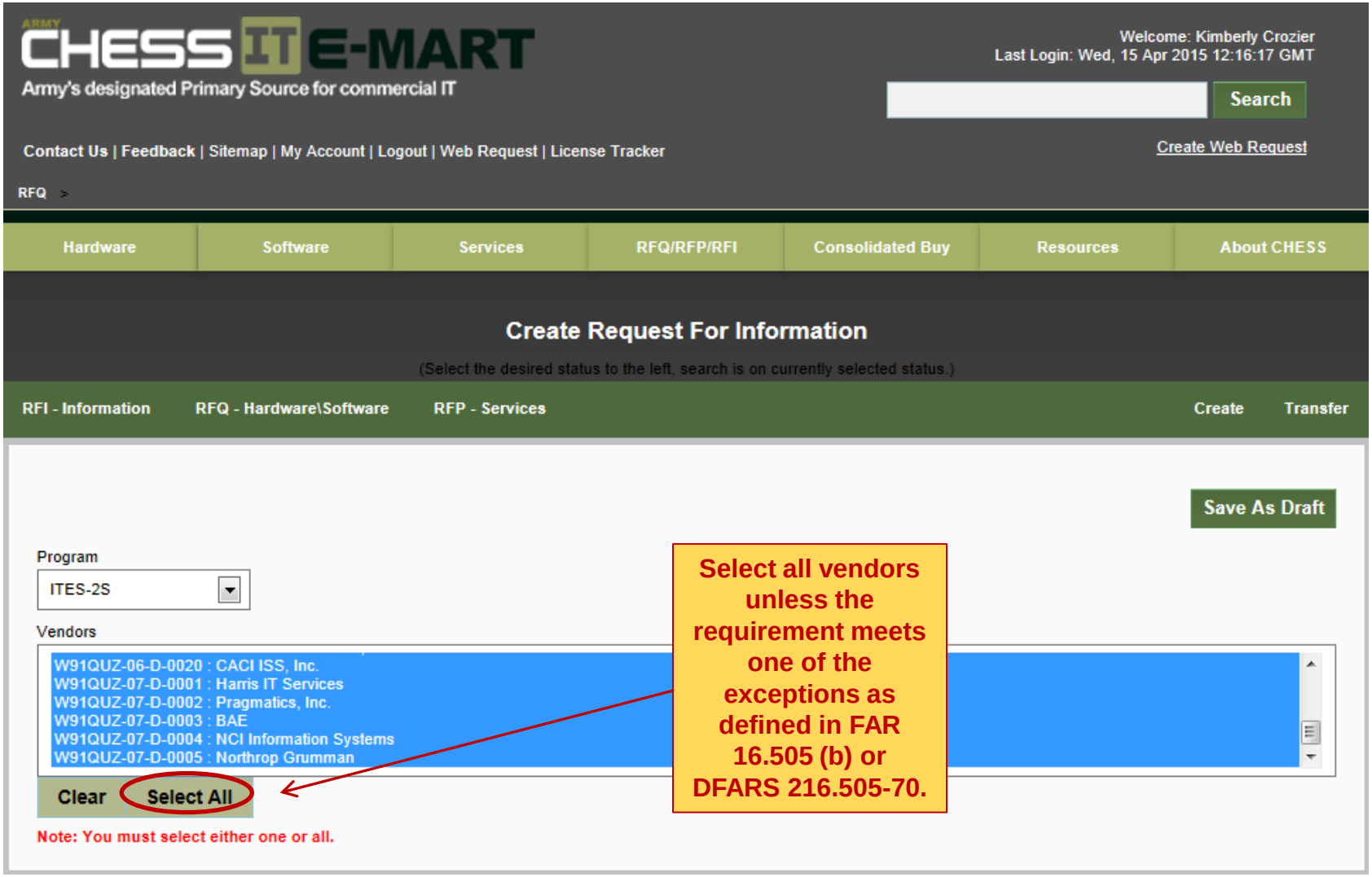
You will automatically be defaulted to the RFQ-Hardware Index page. Hover over the "RFI-Information" button and select "Create" or hover over the "Create" button and select "RFI" to continue.

Step 6 - Select Type of Request



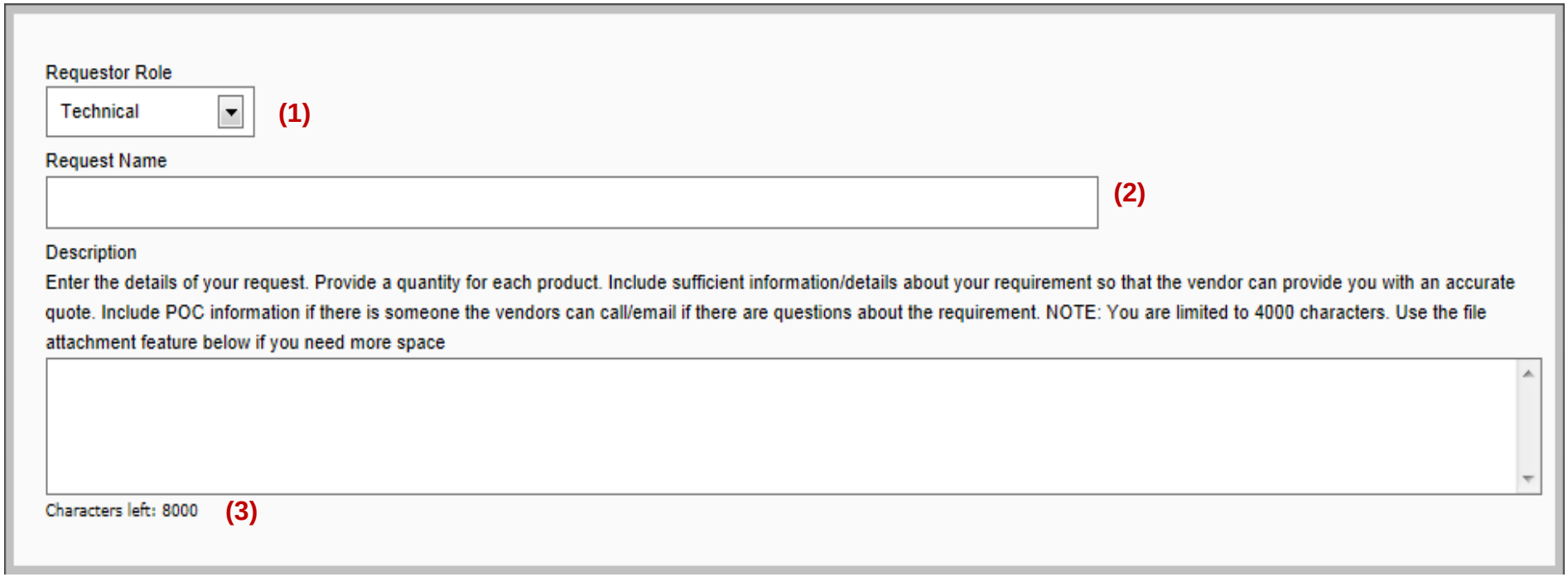
Select a program from the drop down menu.

Step 7 - Select Vendors



Select all vendors unless the requirement meets one of the exceptions as defined in FAR 16.505 (b) or DFARS 216.505-70.

Step 8 - Enter Information



(1) Select your role from the drop down menu.

(2) Name the RFI.

(3) Provide a brief description about what is needed.

Step 9 - Add Attachments

Notice: Please ensure uploaded attachments DO NOT contain vendor proprietary information (competitor pricing, discounts, etc.). This is unfair competition. Instances of this will be reported to the CHESS Product Leader (PL).

Attachments

Only the following file types will be accepted:

- Adobe Acrobat PDF (.pdf)
- Excel (.xls & .xlsx)
- TIFF Files (.tif)
- WinZip Files (.zip)
- Word (.doc & .docx)

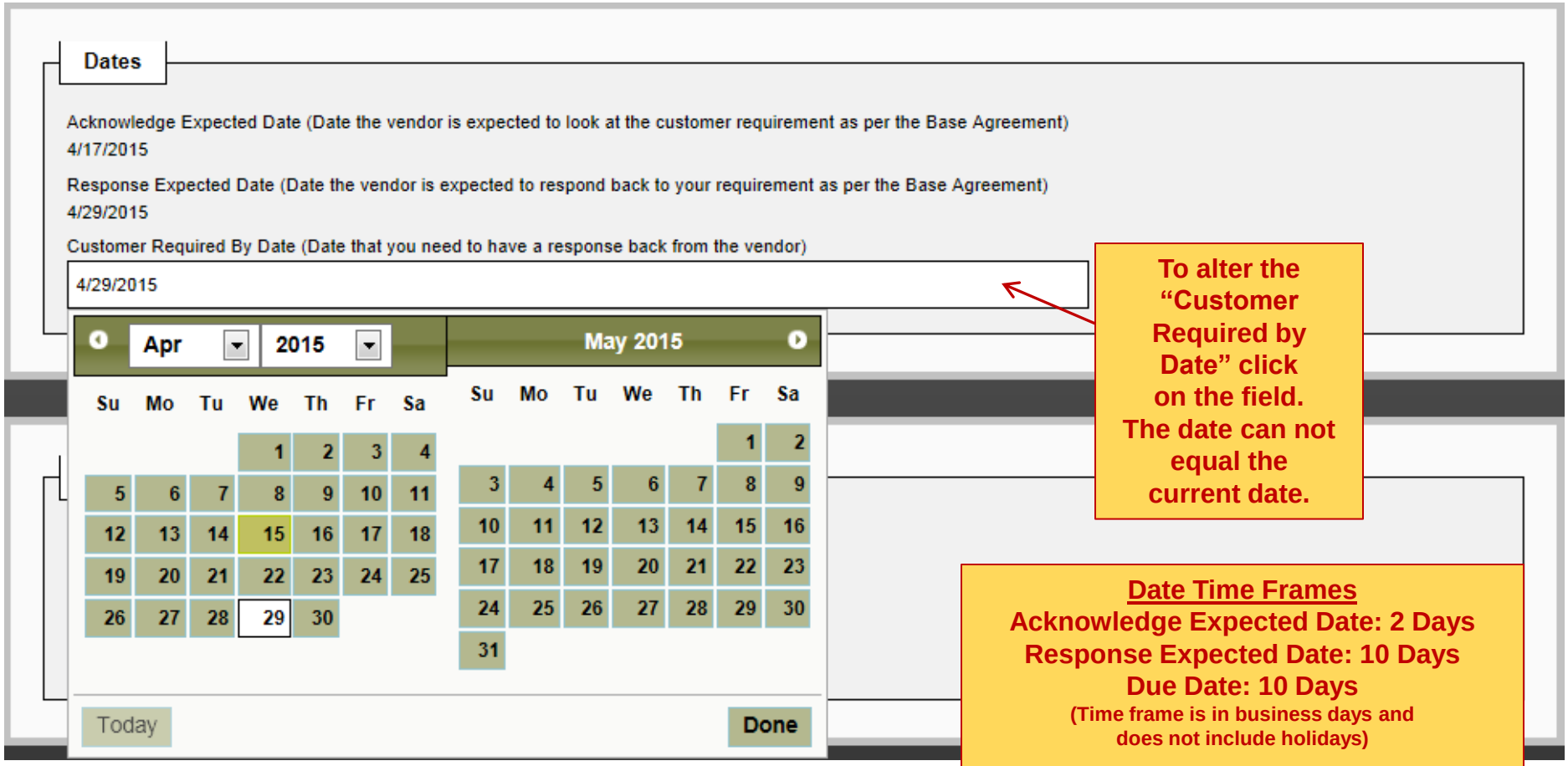
You may upload with a maximum file size of 5 megabytes (MB) per file.

	Browse...	Clear
	Browse...	Clear
	Browse...	Clear
	Browse...	Clear
	Browse...	Clear

You may attach up to 5 files of 5MB each.
(The system accommodates Word, Excel, PDF, TIF, and WinZip files)

NOTE: Please DO NOT add an attachment with other vendor pricing!

Step 10 - Dates



To alter the "Customer Required by Date" click on the field. The date can not equal the current date.

Date Time Frames

Acknowledge Expected Date: 2 Days
Response Expected Date: 10 Days
Due Date: 10 Days
(Time frame is in business days and does not include holidays)

NOTE: "Customer Required by Date" can be altered but we ask you follow the time frame when applicable.

Step 11 - Submit RFI

Dates

Acknowledge Expected Date (Date the vendor is expected to look at the customer requirement as per the Base Agreement)
4/17/2015

Response Expected Date (Date the vendor is expected to respond back to your requirement as per the Base Agreement)
4/29/2015

Customer Required By Date (Date that you need to have a response back from the vendor)

4/29/2015

Contact Information

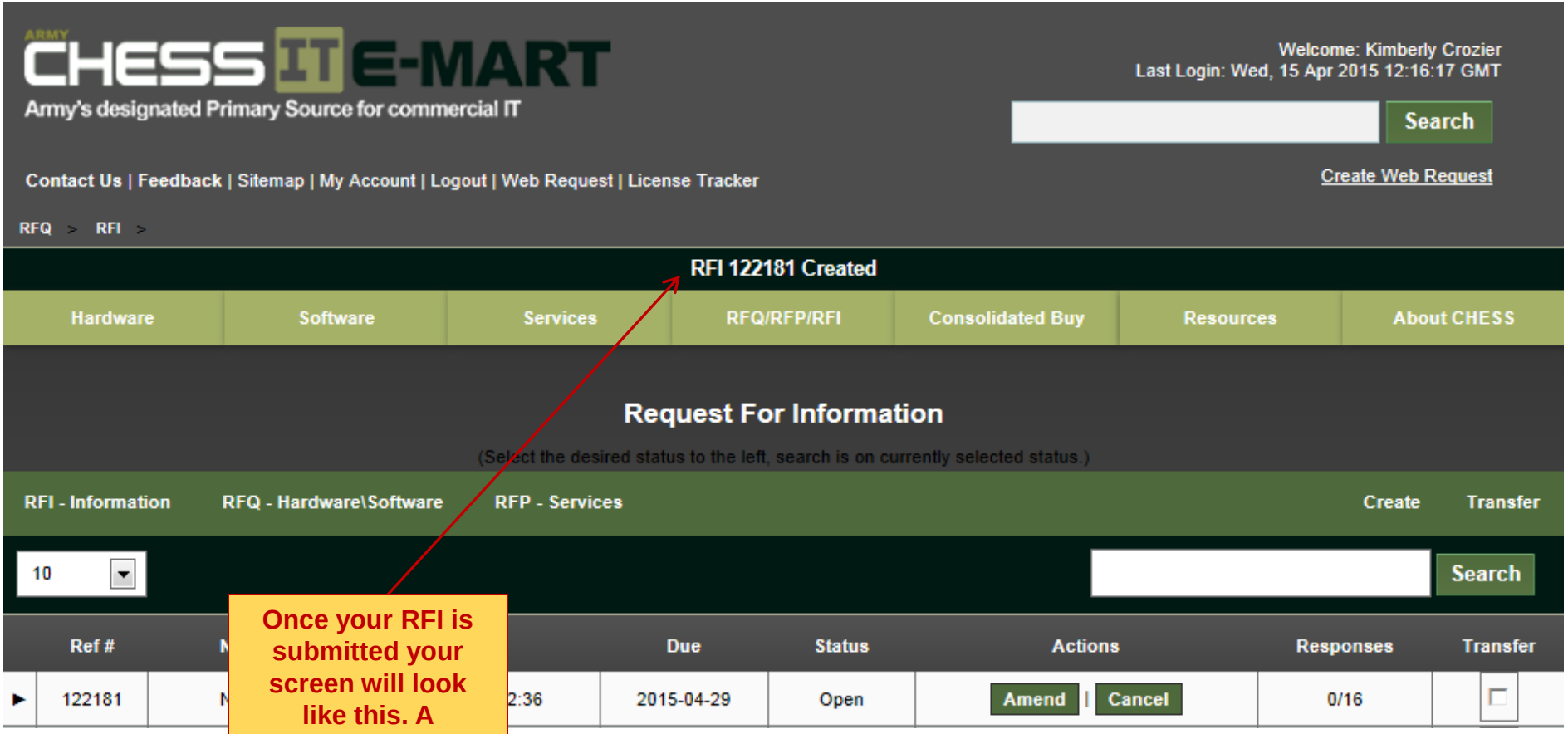
Submitting POC:

First Name:	Kimberly
Last Name:	Crozier
Commercial Phone:	7038061033
Email address:	kimberly.k.crozier.ctr@mail.mil

Submit Cancel

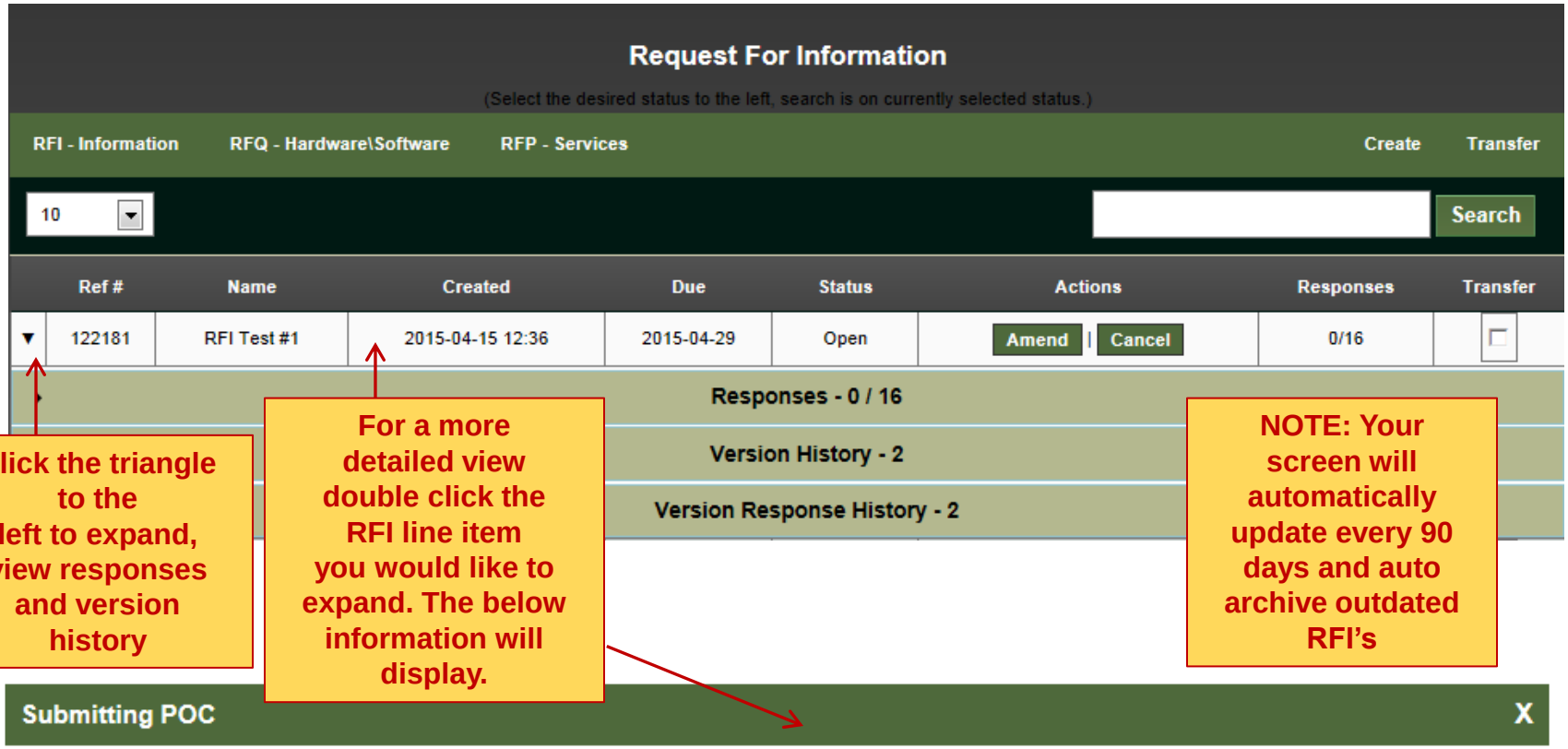
Click to submit RFI

View of successfully submitted RFI



Once your RFI is submitted your screen will look like this. A bar at the top of the page will indicate that your RFI has been created.

View of successfully submitted RFI



Click the triangle to the left to expand, view responses and version history

For a more detailed view double click the RFI line item you would like to expand. The below information will display.

NOTE: Your screen will automatically update every 90 days and auto archive outdated RFI's

Submitting POC X

Name	Kimberly Crozier	Email	kimberly.k.crozier.ctr@mail.mil
		Role	Technical

Request Name	RFI Test #1
Description	This is a test.

The RFI Process After Submission

- Requestor and vendor will receive RFI notification via email from CHESS IT e-mart.
- The vendor responds to the RFI.
- The requestor receives email notification that RFI responses have been posted to the RFI Manager.
- The requestor logs back into the RFI Manager to view responses.

Email to Requestor

- Once your RFI is submitted you will receive an email from the CHESS IT e-mart like the one below

Classification: UNCLASSIFIED
Caveats: NONE

You have just successfully submitted a new Request for Information (RFI) through the CHESS IT e-mart.
Details of your request are below:

Title: Name
Program: ITES-2S
Reference Number: 122181
Description: Provide a brief description.
Date Created: 4/15/2015
Customer Required By Date: 4/29/2015
Vendors Selected: Apptis Inc.
IBM
Lockheed Martin
Northrop Grumman
NCI Information Systems
Dell Federal Systems
CSC
HP Enterprise Services
BAE
STG, Inc.
Booz Allen Hamilton, Inc.
CACI ISS, Inc.
SAIC

Email to Vendor(s)

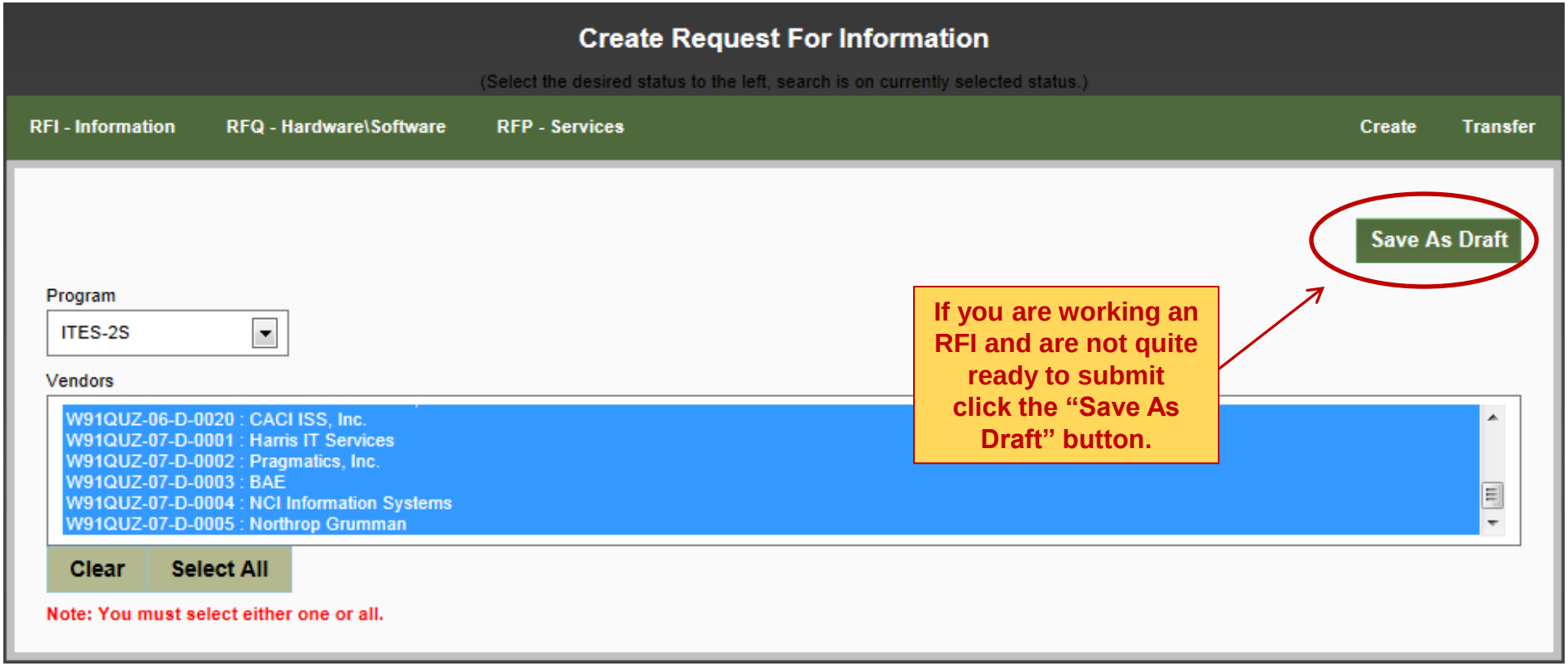
- Each vendor receives an email, which looks similar to this one, alerting them of your RFI.

```
Classification: UNCLASSIFIED
Caveats: NONE

The CHESS IT e-mart has brought you a potential customer! By accessing the
RFI below, you are acknowledging the receipt of the RFI.

Please coordinate with the customer concerning their pending RFI by logging
into the RFI Manager.

Keep in mind that CHESS customers are awaiting your response, and your
timeliness in addressing their RFIs is greatly appreciated.

Thank you for using the CHESS IT e-mart system!

Please feel free to contact CHESS at: (888) 232-4405 if you have any
questions.

Classification: UNCLASSIFIED
Caveats: NONE
```

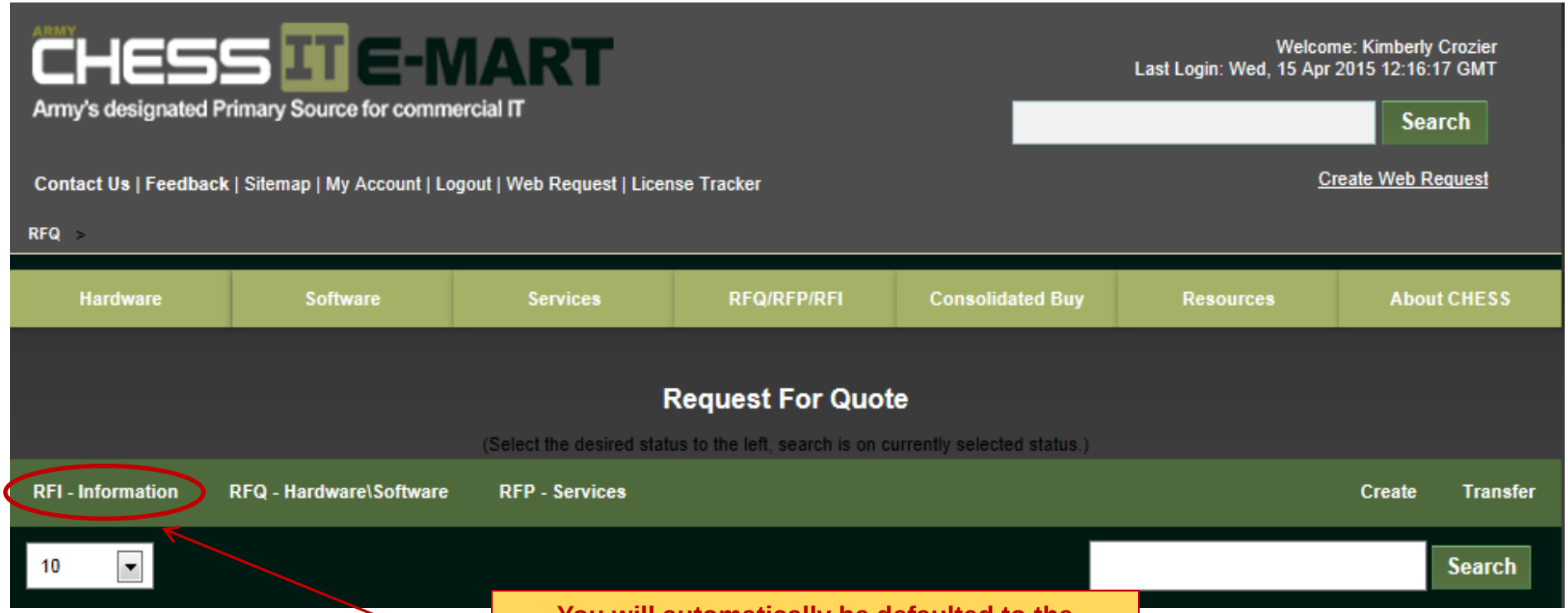
Creating a Draft RFI

New Process!

Step 1 - Save as Draft



Step 2 - View RFI Drafts



You will automatically be defaulted to the RFQ-Hardware Index page. Hover over the "RFI-Information" button and select "Draft" for a list of your Draft Requests.

Step 2 - View RFI Drafts continued

List of Draft Request

(Select the desired status to the left, search is on currently selected status.)

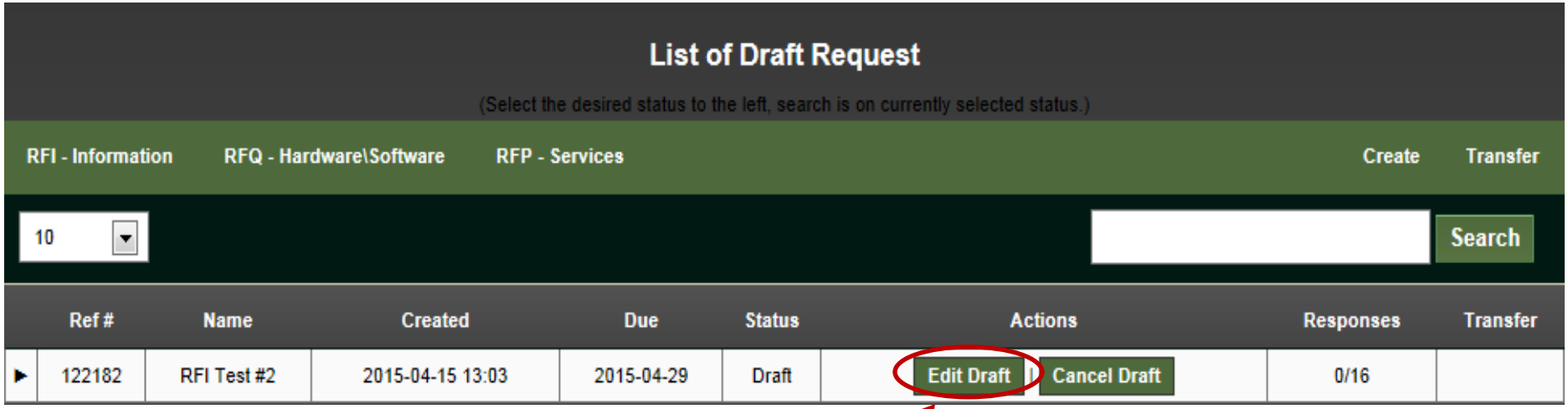
RFI - Information | RFQ - Hardware\Software | RFP - Services | Create | Transfer

10 | Search

	Ref #	Name	Created	Due	Status	Actions	Responses	Transfer
▶	122182	RFI Test #2	2015-04-15 13:03	2015-04-29	Draft	Edit Draft | Cancel Draft	0/16	

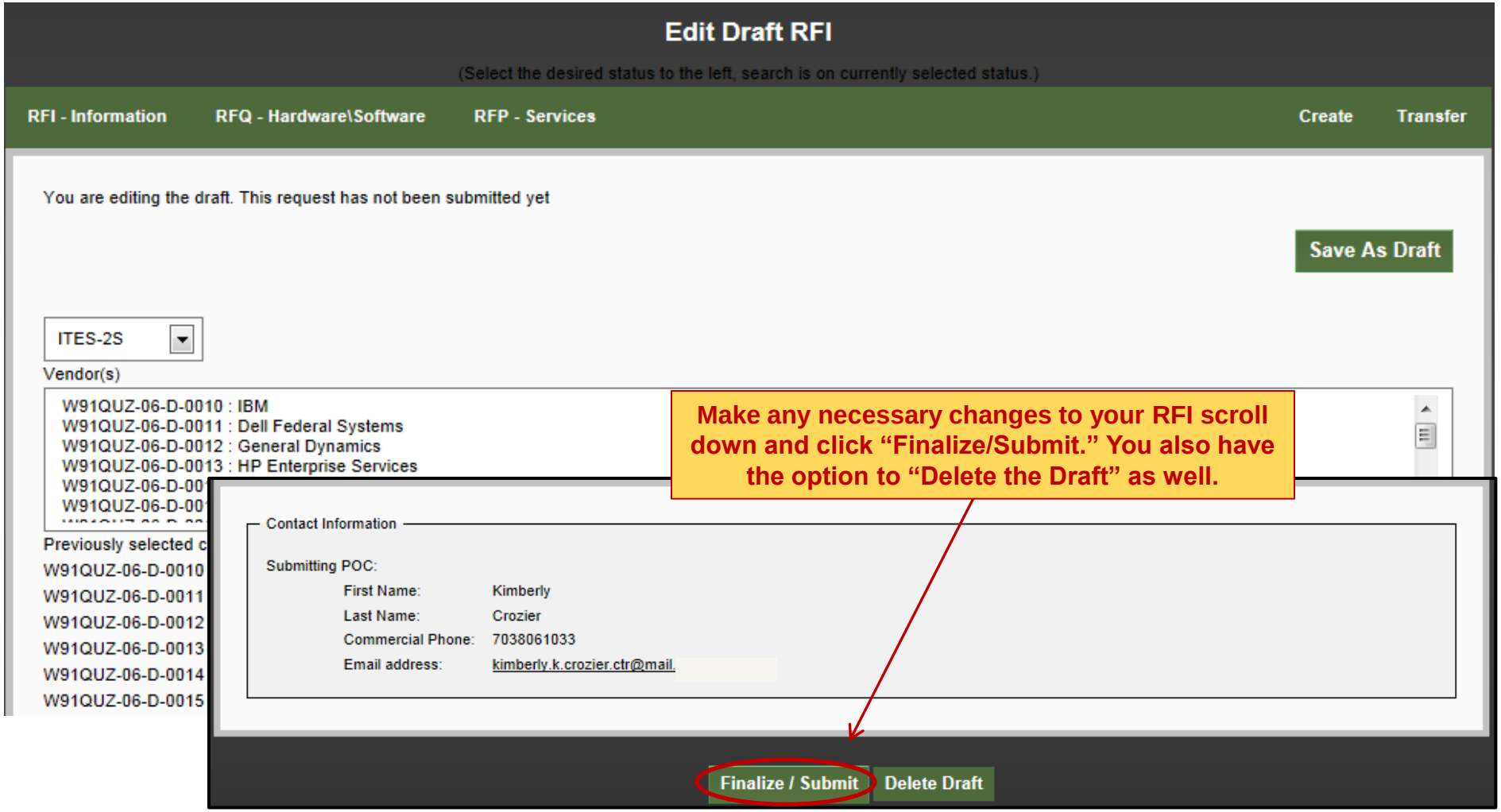
On this page all the Drafts RFI's you are currently working on will be listed.

Step 3 - Edit Draft



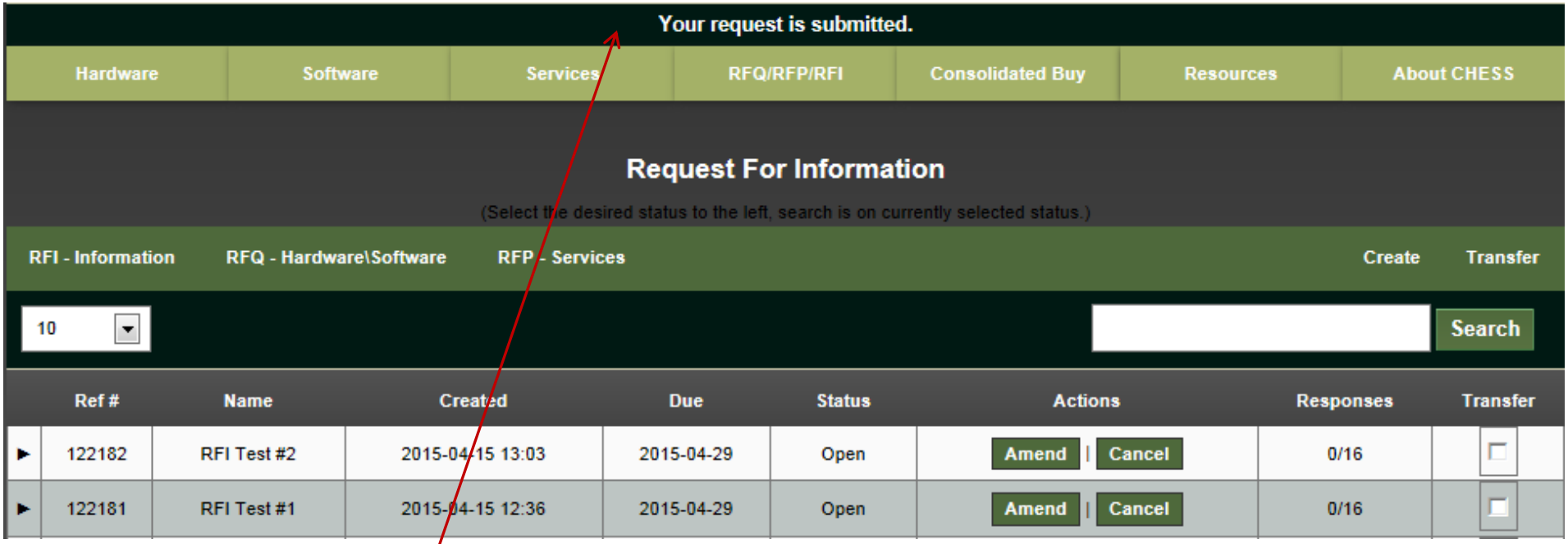
Select "Edit Draft" whenever you need to make changes to your RFI.

Step 4 - Make Changes & Submit



Make any necessary changes to your RFI scroll down and click "Finalize/Submit." You also have the option to "Delete the Draft" as well.

View of successfully submitted RFI



Once your RFI is submitted your screen will look like this. A bar at the top of the page will indicate that your RFI has been submitted.

Amending an RFI

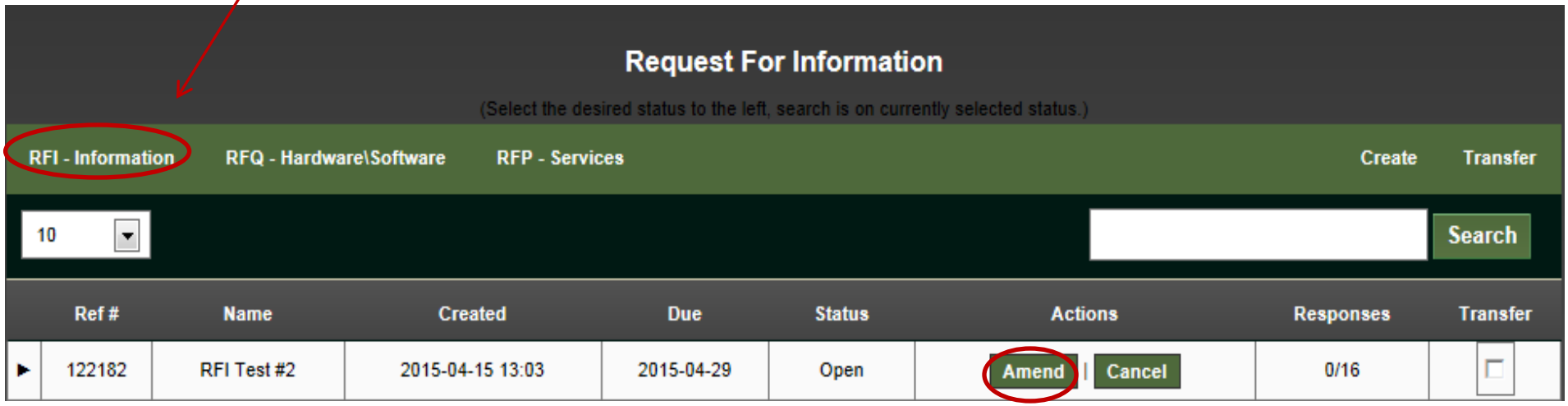
Amending an RFI

The **Amendment** feature allows you to:

- Update an RFI at any time in the process
- Clarify the details of a request
- Notify vendors of updates or new deadlines

Amending an RFI

Ensure you are on the "RFI-Information" Index by hovering over "RFI-Information" and then clicking "Index"



Click "Amend" on the RFI you wish to Amend.

Amending an RFI

Requestor Role

Technical

Request Name

RFI Test #2

Description

Enter the details of your request. Provide a quantity for each product. Include sufficient information/details about your requirement so that the vendor can provide you with an accurate quote. Include POC information if there is someone the vendors can call/email if there are questions about the requirement. NOTE: You are limited to 4000 characters. Use the file attachment feature below if you need more space

This is a test

Characters left: 7986

Update information in the Description field as required.

Amending an RFI

Notice: Please ensure uploaded attachments DO NOT contain vendor proprietary information (competitor pricing, discounts, etc.). This is unfair competition. Instances of this will be reported to the CHESS Product Leader (PL).

Attachments

Only the following file types will be accepted:

- Adobe Acrobat PDF (.pdf)
- Excel (.xls & .xlsx)
- TIFF Files (.tif)
- WinZip Files (.zip)
- Word (.doc & .docx)

You may upload with a maximum file size of 5 megabytes (MB) per file.

Browse... Clear

Browse... Clear

Browse... Clear

Browse... Clear

Browse... Clear

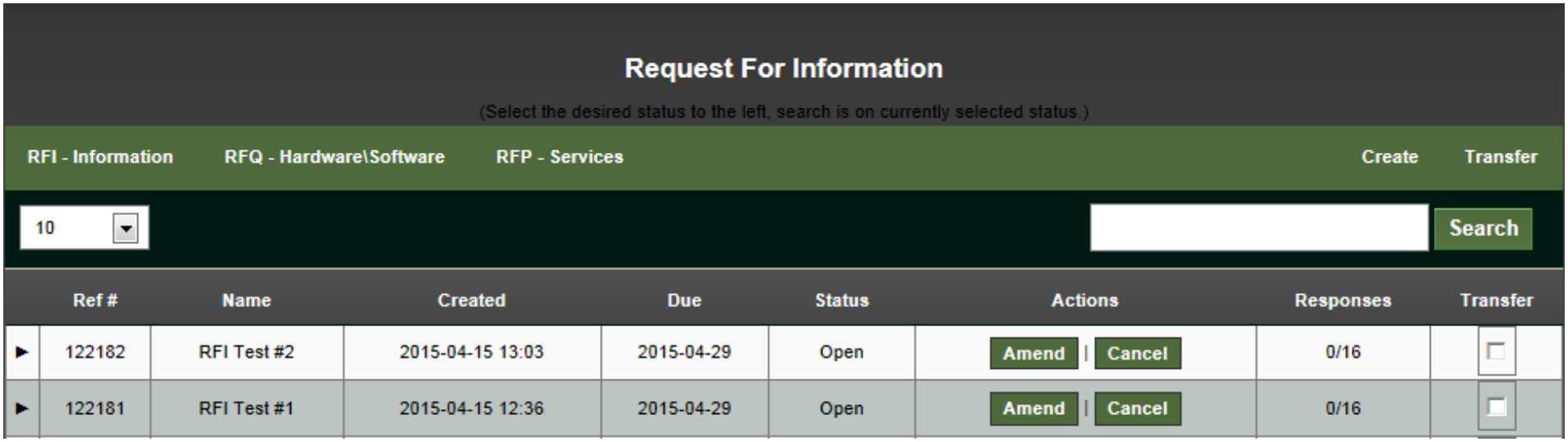
Submit Cancel

You may attach up to 5 files of 5MB each.
(The system accommodates Word, Excel, PDF, TIF, and WinZip files)

This allows you to attach new files. *NOTE: Your original files are still attached. Only add additional attachments if those files need to be updated or a new file is to be submitted

Click "Submit" to Amend your RFI

Amending an RFI



Once your RFI is amended your screen will look like this.

NOTE: The Status column will not change for the RFI you recently amended.

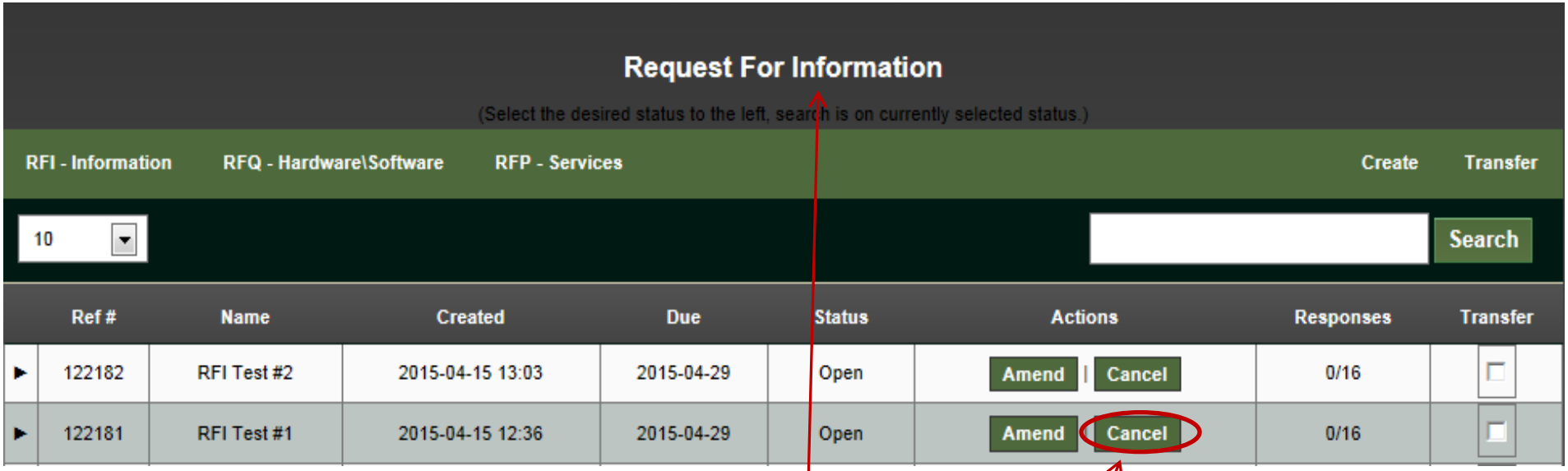
Canceling an RFI

Canceling an RFI

The **Cancel** feature allows you to:

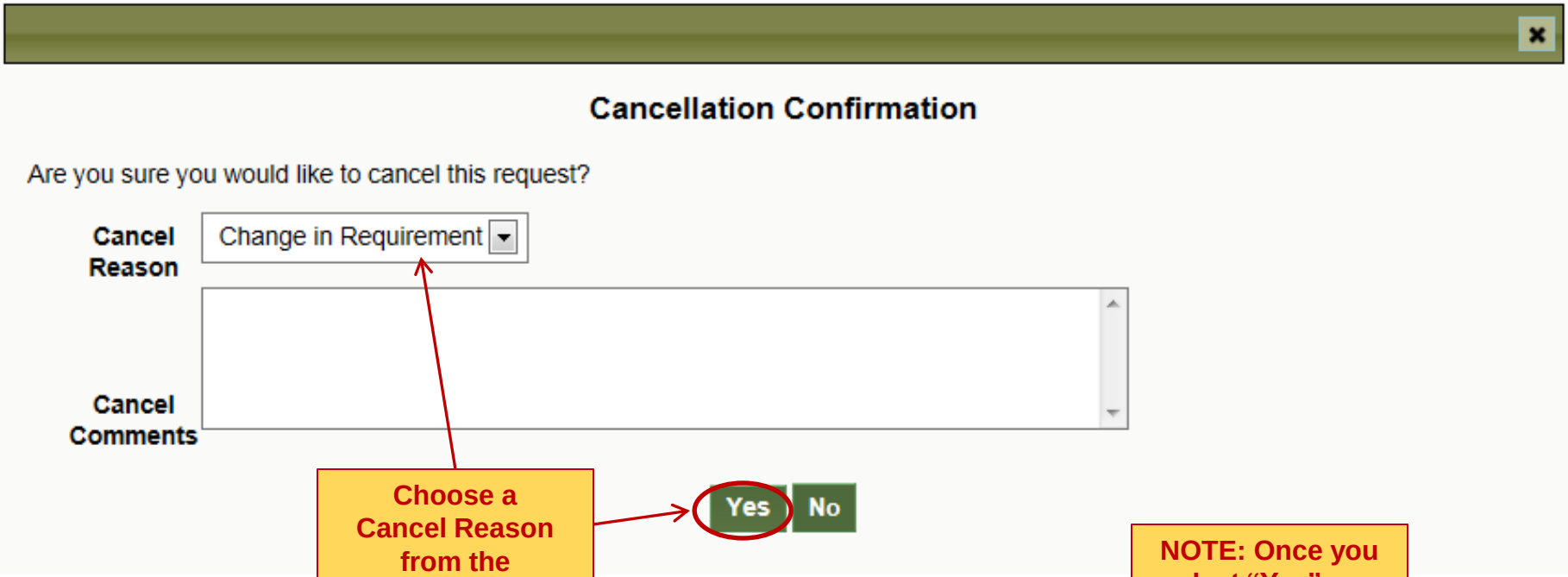
- Cancel an RFI at any time in the process
- Notify vendors of updates and the cancellation of an RFI

Canceling an RFI



Ensure you are on the "RFI-Information" Index page then click the "Cancel" link to the right of your RFI.

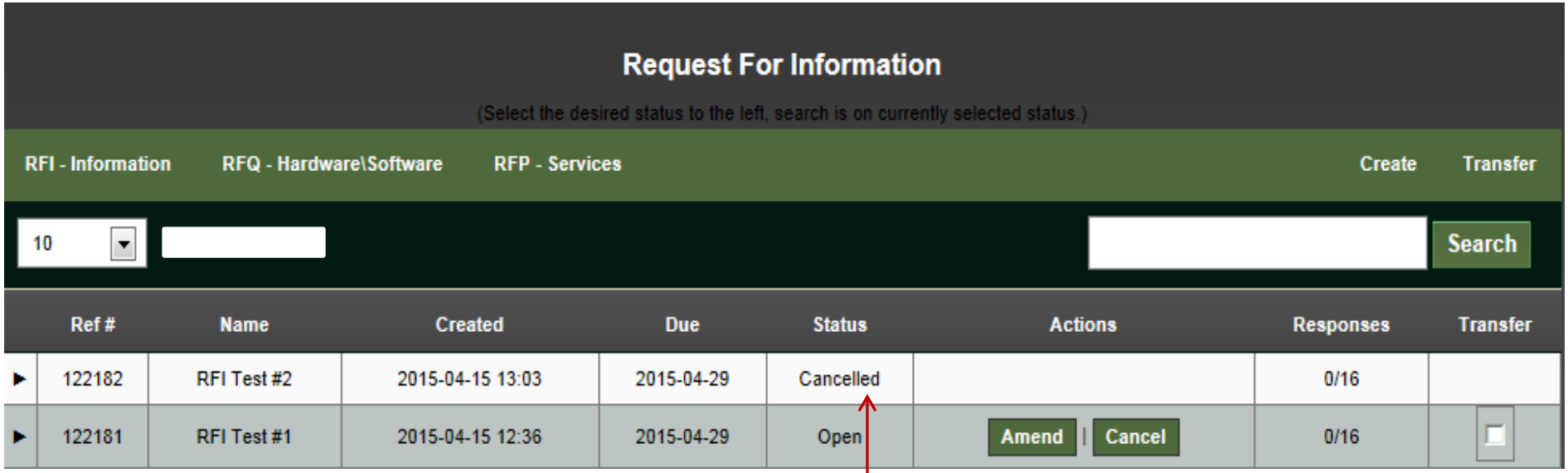
Canceling an RFI



Choose a Cancel Reason from the drop down menu and then click "Yes" to submit.

NOTE: Once you select "Yes" you will not be able to edit your RFI. It will be cancelled.

Canceling an RFI



NOTE: Once the RFI is cancelled you will have to submit a new RFI if you have a new request.

Once your RFI is cancelled the Status column will change to "Cancelled"

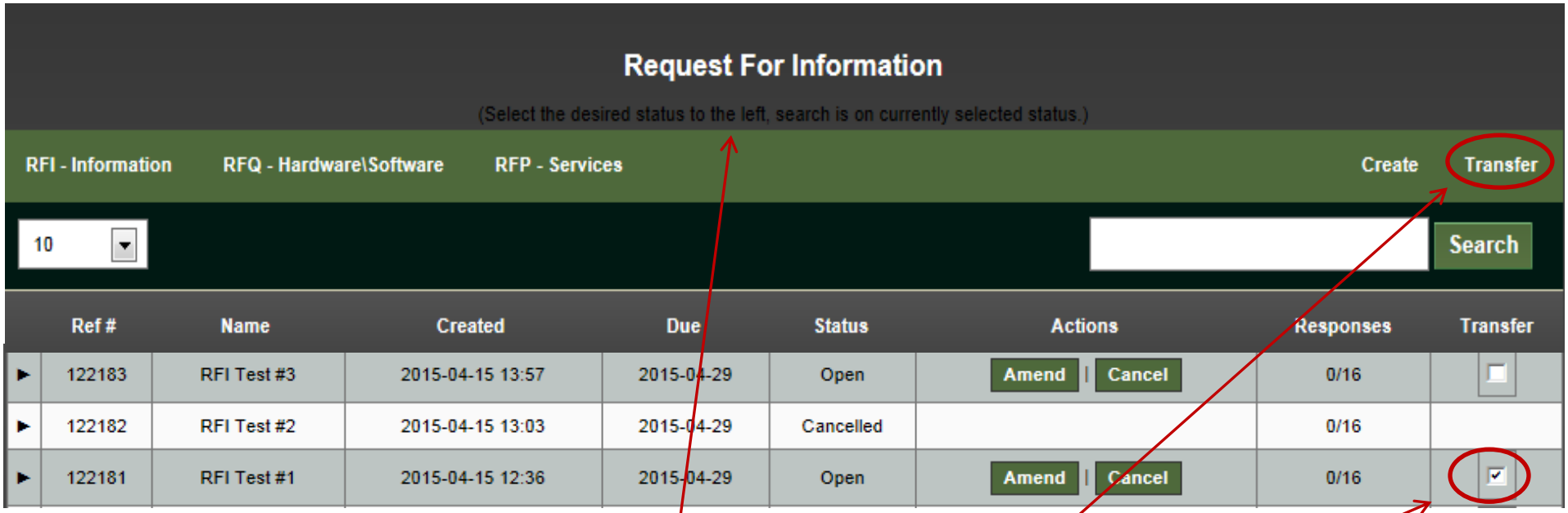
Transferring an RFI

Transferring an RFI

The **Transfer** feature allows you to:

- Transfer an RFI at any time in the process to another user
- User is able to transfer multiple RFI's at once to another user
- The person who submitted or anyone with administrative authority may transfer/reassign the RFI

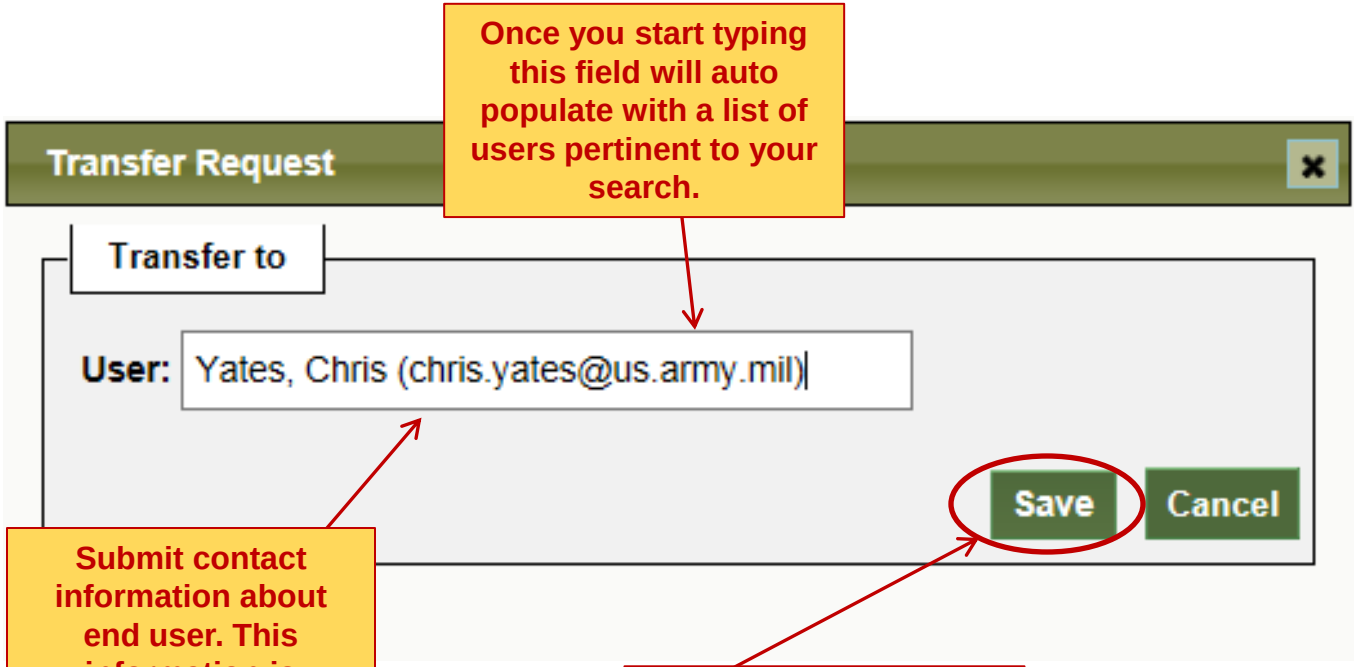
How a Requestor Transfers an RFI



Ensure you are on the "RFI-Information" Index page click the checkbox under the Transfer column found to the right of your RFI and then click "Transfer."

NOTE: If you click on multiple checkboxes you will be able to transfer multiple RFI's to one person

How a Requestor Transfers an RFI

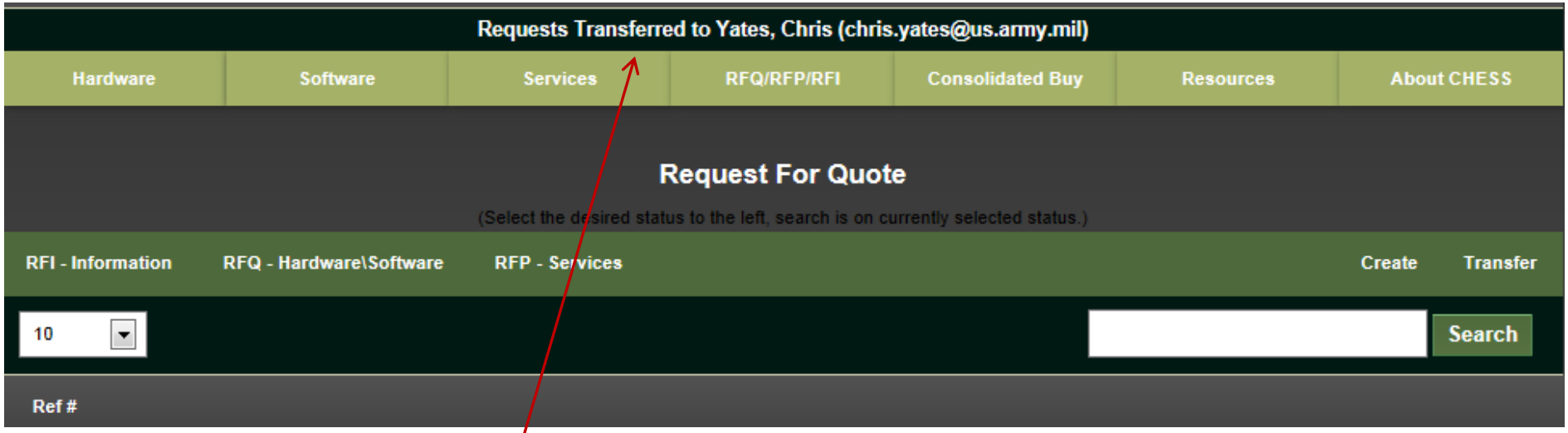


Once you start typing this field will auto populate with a list of users pertinent to your search.

Submit contact information about end user. This information is maintained by CHESS, but not shared with vendors.

Then click "Save" to Transfer the RFI.

How a Requestor Transfers an RFI

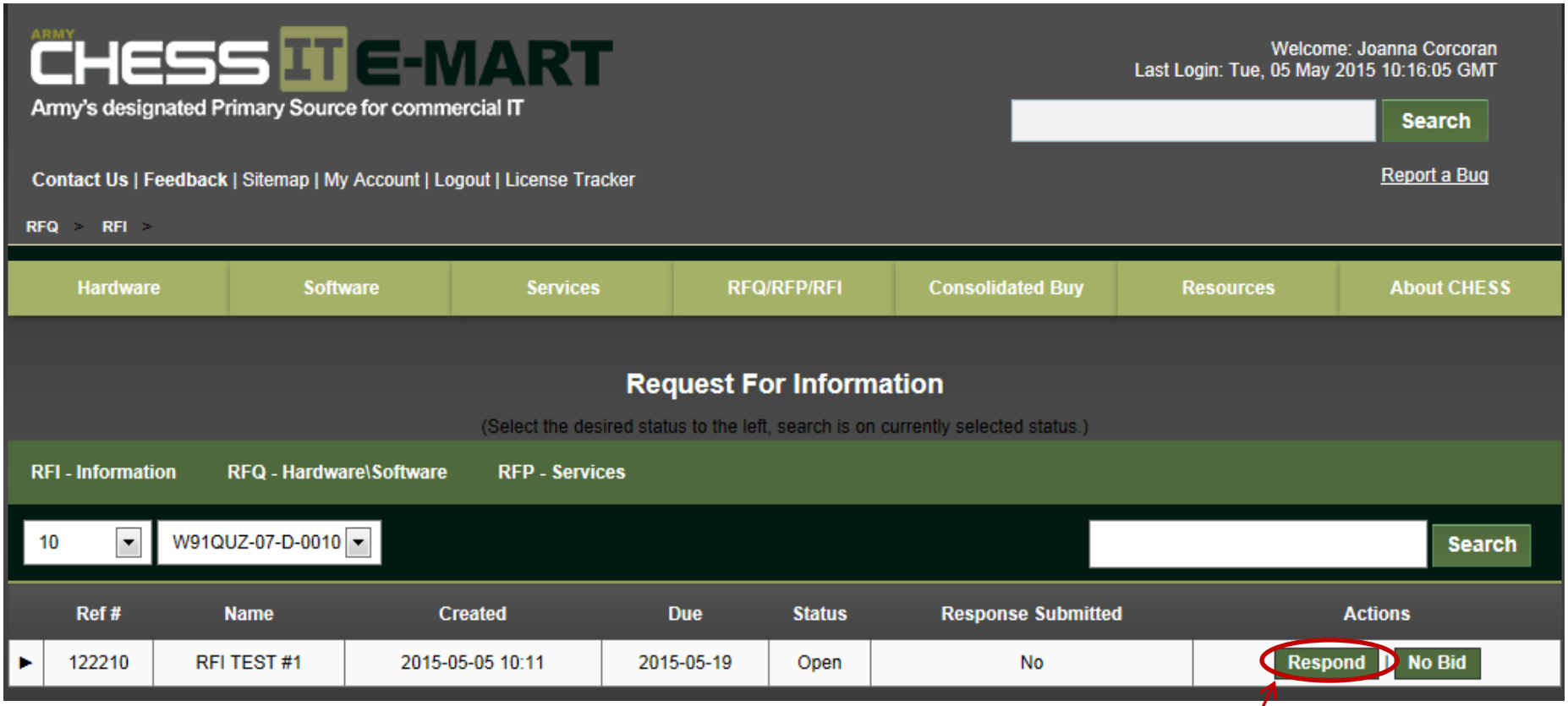


Once your RFI is Transferred your screen will look like this. A bar at the top of the page will indicate that your RFI has been transferred.

NOTE: The RFI that was transferred will no longer appear in your list of RFI's.

Vendor View of RFI Submissions

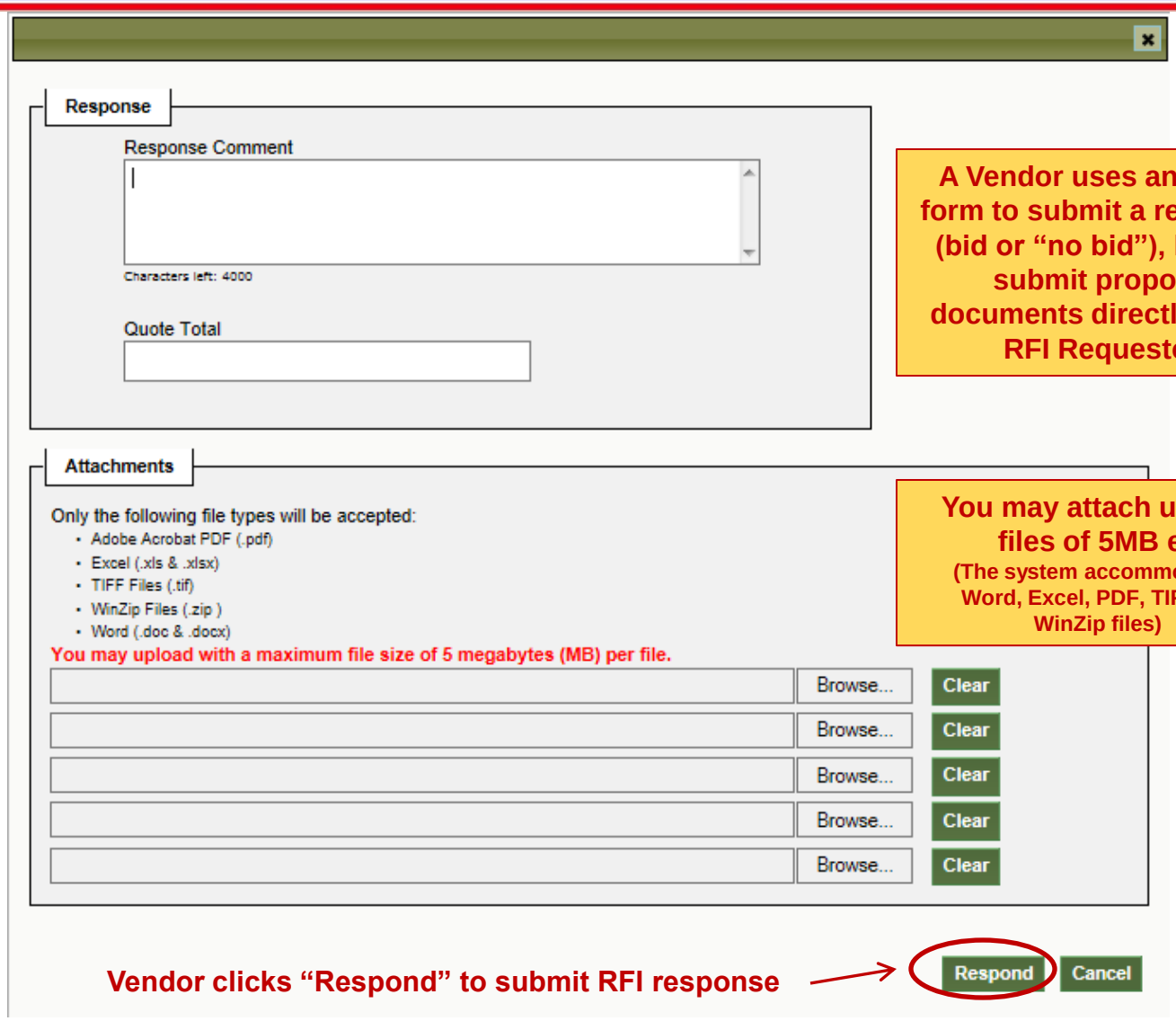
Vendor View of RFI Response



Once Vendors log in, they will see a screen that looks like this.

In order to respond to a particular RFI the Vendor must click the "Respond" link to the right of the RFI.

Vendor Responds to an RFI

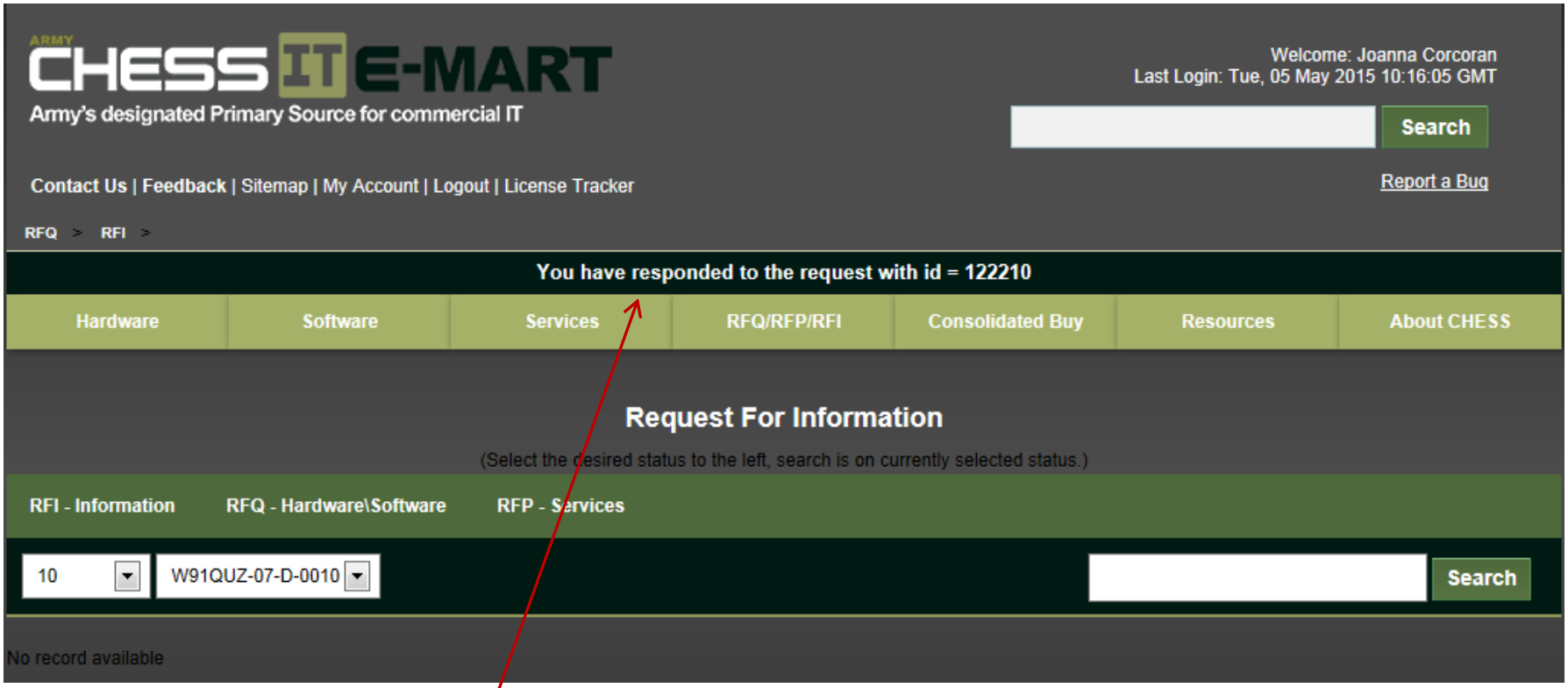


A Vendor uses an online form to submit a response, (bid or "no bid"), but will submit proposal documents directly to the RFI Requestor.

You may attach up to 5 files of 5MB each.
(The system accommodates Word, Excel, PDF, TIF, and WinZip files)

Vendor clicks "Respond" to submit RFI response

Vendor Responds to an RFI



Once a Vendor hits submit to respond to a request a bar at the top of the page will indicate the response was submitted

Vendor Views Responded RFIs

ARMY CHESS IT E-MART
Army's designated Primary Source for commercial IT

Welcome: Joanna Corcoran
Last Login: Tue, 05 May 2015 10:16:05 GMT

Search

Contact Us | Feedback | Sitemap | My Account | Logout | License Tracker

Report a Bug

RFQ > RFI >

You have responded to the request with id = 122210

Hardware | Software | Services | RFQ/RFP/RFI | Consolidated Buy | Resources | About CHESS

Request For Information

(Select the desired status to the left, search is on currently selected status.)

RFI - Information | RFQ - Hardware\Software | RFP - Services

10 | W91QUZ-07-D-0010 | Search

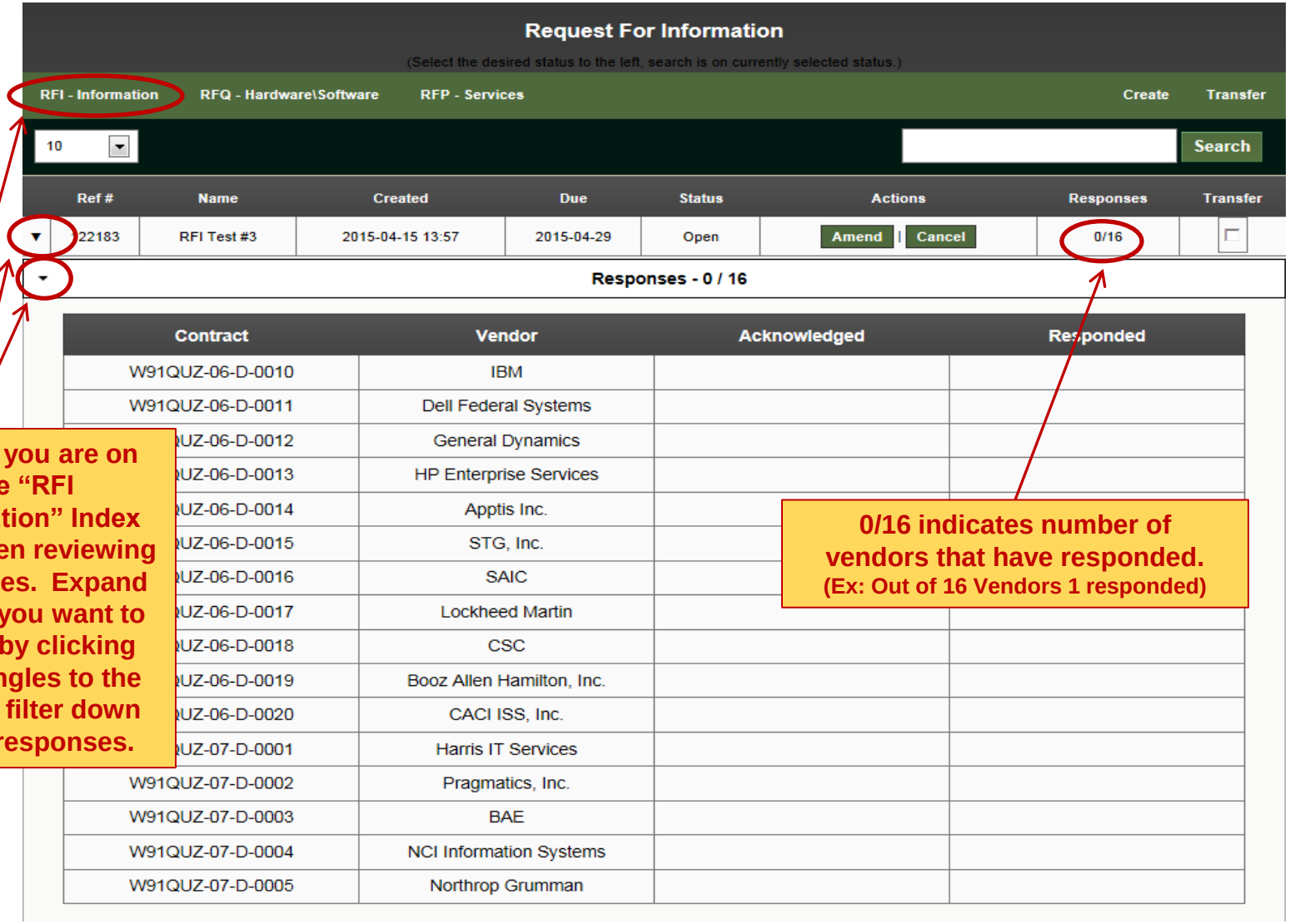
	Rel #	Name	Created	Due	Status	Response Submitted	Actions
▶	122210	RFI TEST #1	2015-05-05 10:11	2015-05-19	Responded	Yes	
▶	122206	test	2015-05-01 09:34	2015-05-15	Responded	Yes	

A Vendor needs to ensure they are on the "Responded" page by hovering over "RFI-Information" and clicking "Responded" in order to see a list of ALL responded requests.

Once a response is submitted the Status will change to "Responded."

Requestor View of RFI Responses

View RFI Response

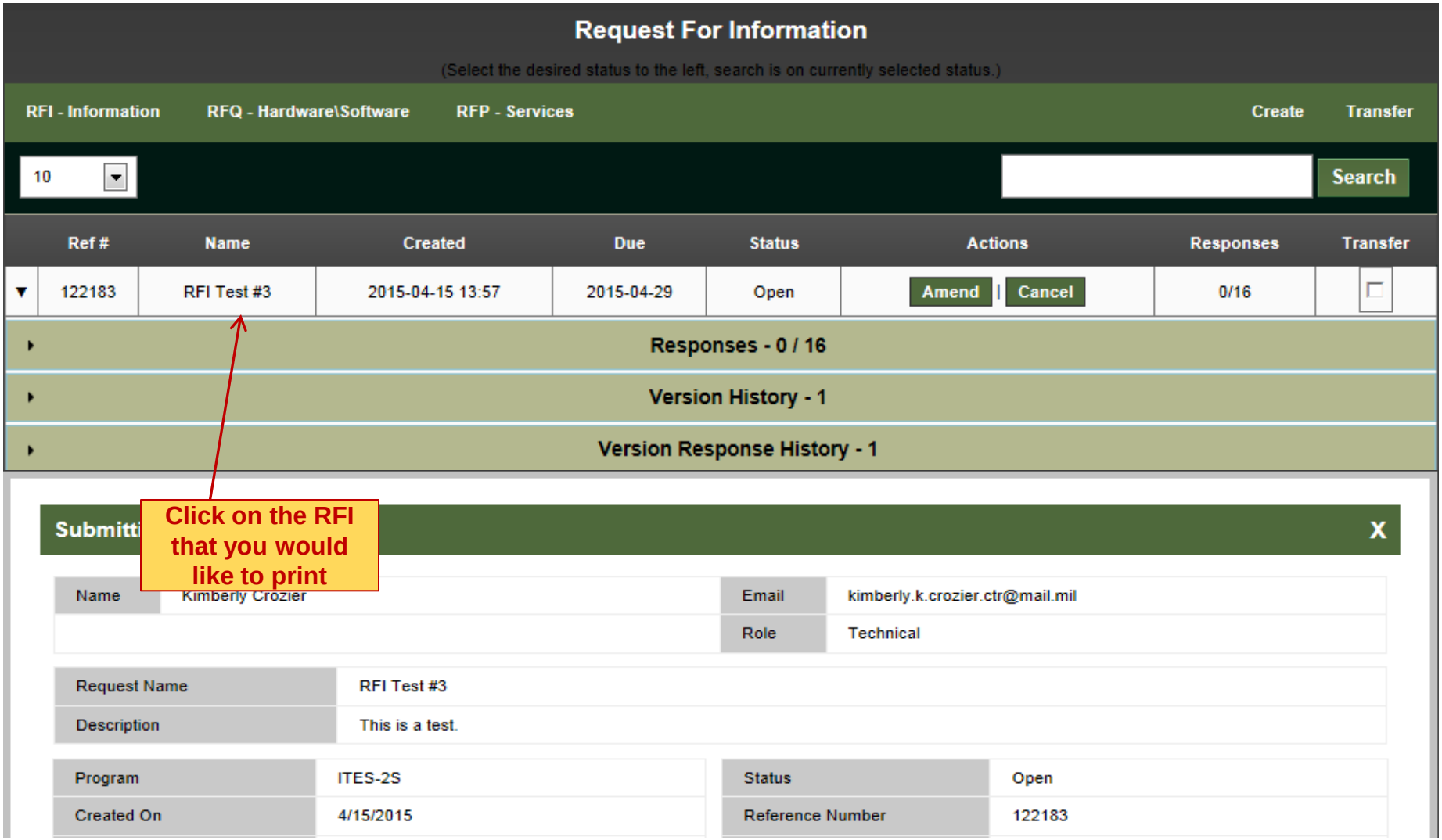


Ensure you are on the "RFI Information" Index page when reviewing responses. Expand the RFI you want to review by clicking the triangles to the left and filter down to see responses.

0/16 indicates number of vendors that have responded. (Ex: Out of 16 Vendors 1 responded)

Printing an RFI

Printing an RFI



Click on the RFI that you would like to print

Printing an RFI

Submitting POC

X

Name	Kimberly Crozier	Email	kimberly.k.crozier.ctr@mail.mil
		Role	Technical

Request Name	RFI Test #3
Description	This is a test.

Program	ITES-2S	Status	Open
Created On	4/15/2015	Reference Number	122183
Acknowledged	False	Last Updated	4/15/2015
Date Acknowledged		Acknowledgment Expected	4/17/2015
Date Responded		Responded	False
Customer Required By Date	4/29/2015	Response Expected	4/29/2015

Versions (Amendments and Transfers)	0 (Original)

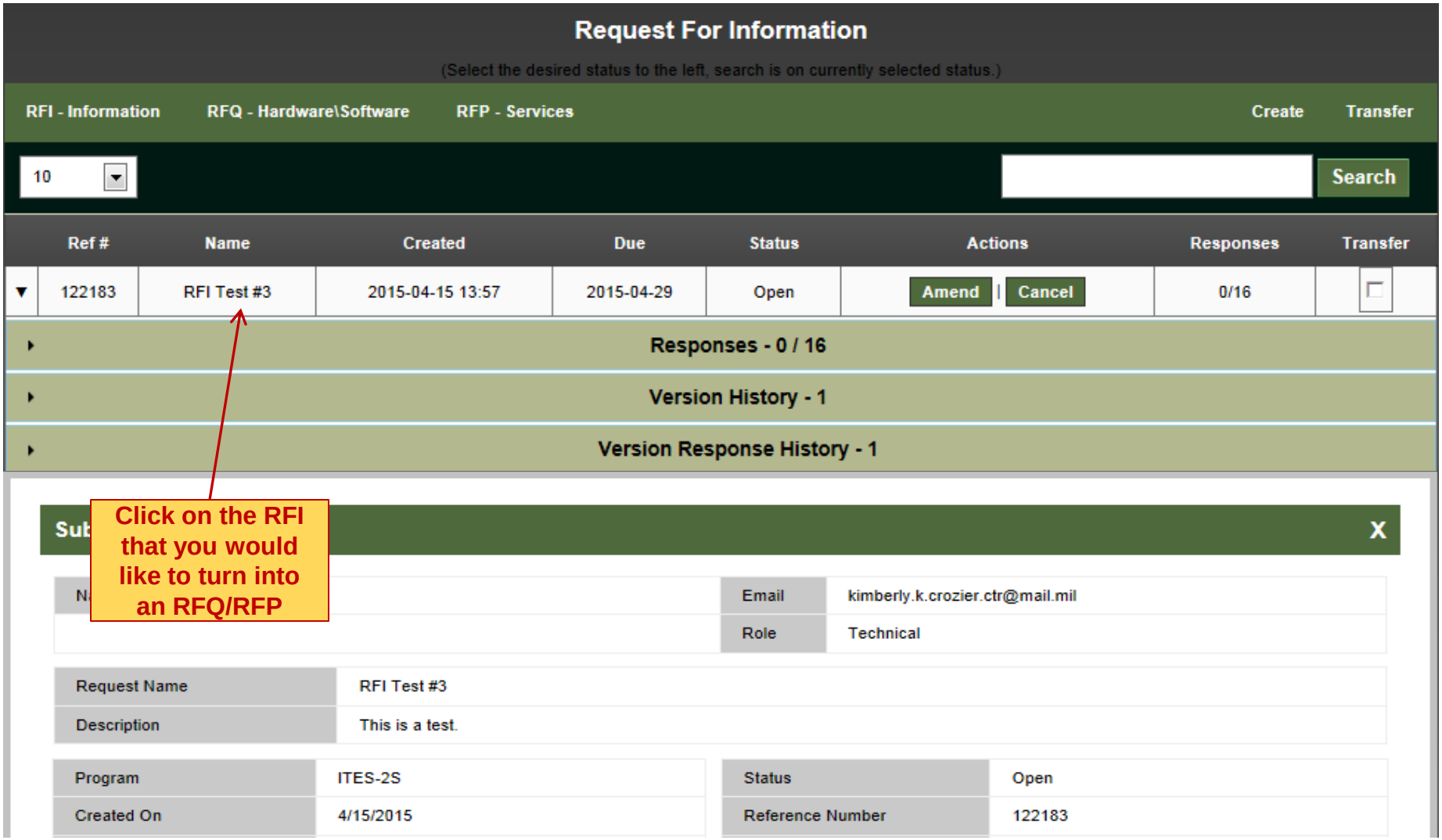
Cancel Reason	
Date Cancelled	
Cancel Comment	

Scroll down and Click the "Print" button at the bottom of the page

Create RFQ | Create RFP | Print

Transferring an RFI into a RFQ or RFP

RFI Transfer to RFQ/RFP



Click on the RFI that you would like to turn into an RFQ/RFP

RFI Transfer to RFQ/RFP

Submitting POC

X

Name	Kimberly Crozier	Email	kimberly.k.crozier.ctr@mail.mil
		Role	Technical

Request Name	RFI Test #3
Description	This is a test.

Program	ITES-2S	Status	Open
Created On	4/15/2015	Reference Number	122183
Acknowledged	False	Last Updated	4/15/2015
Date Acknowledged		Acknowledgment Expected	4/17/2015
Date Responded		Responded	False
Customer Required By Date	4/29/2015	Response Expected	4/29/2015

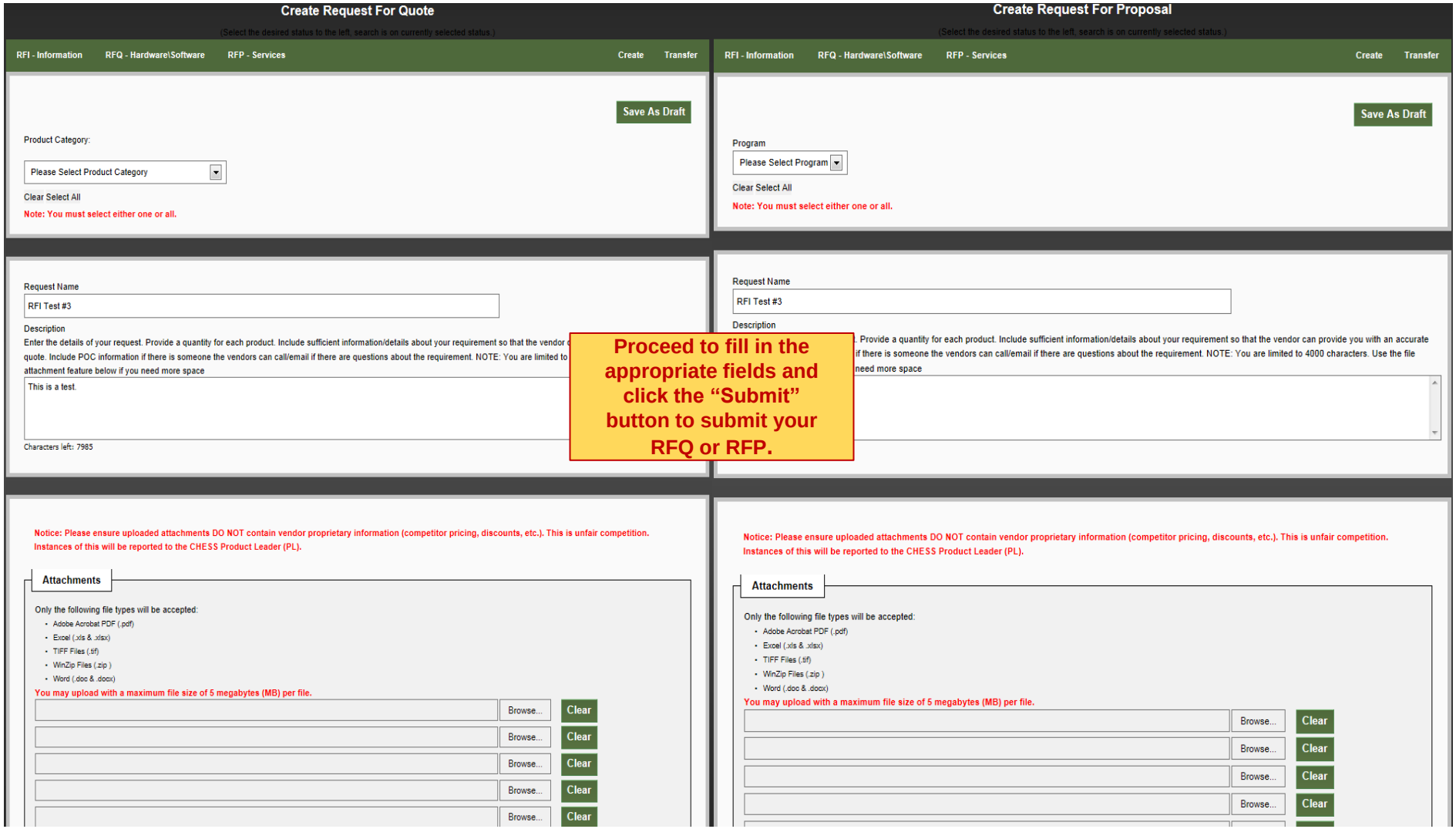
Versions (Amendments and Transfers)	0 (Original)

Cancel Reason	
Date Cancelled	
Cancel Comment	

Click the "Create RFQ" or "Create RFP" button at the bottom of the page.

Create RFQ | Create RFP | Print

RFI Transfer to RFQ/RFP



Proceed to fill in the appropriate fields and click the "Submit" button to submit your RFQ or RFP.

Questions

For information about using the CHESS IT e-mart, contact the CHESS Customer Support Team by email at: armychess@mail.mil or toll free at (888) 232-4405