felix

Procurement Schedule

Felix User Guide

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INTRODUCTION

This user guide provides an understanding about the Procurement Schedule feature as well as step-by-step process on the functionalities of this feature in Felix.

PROCUREMENT SCHEDULE OVERVIEW

Procurement schedules allow you to plan, schedule, track, and visualise sourcing activities for a project. Create packages and configure fields to connect seamlessly to real-time data across Felix providing a central view for progress and targets.

Key features

- Create a list of packages organised by package groups.
- Utilise dynamic templates to create a unique view for each schedule.
- Organise and reorganise fields using field groups.
- Create custom fields to capture details against a package.
- Configure dynamic fields connecting to data across Felix.
- Visualise project progress and targets using the Project Summary.

Packages

Create packages and organise them by package groups. The fields displayed are configured at a project-level, however, templates can be configured at an organisation-level, or users can choose to use the default Felix templates. Fields can be configured for custom values, or dynamic fields allow you to pull in information from the package, RFQs, and RFAs.

Summary

See a visual overview of how projects are progressing along with budgetary targets for packages.
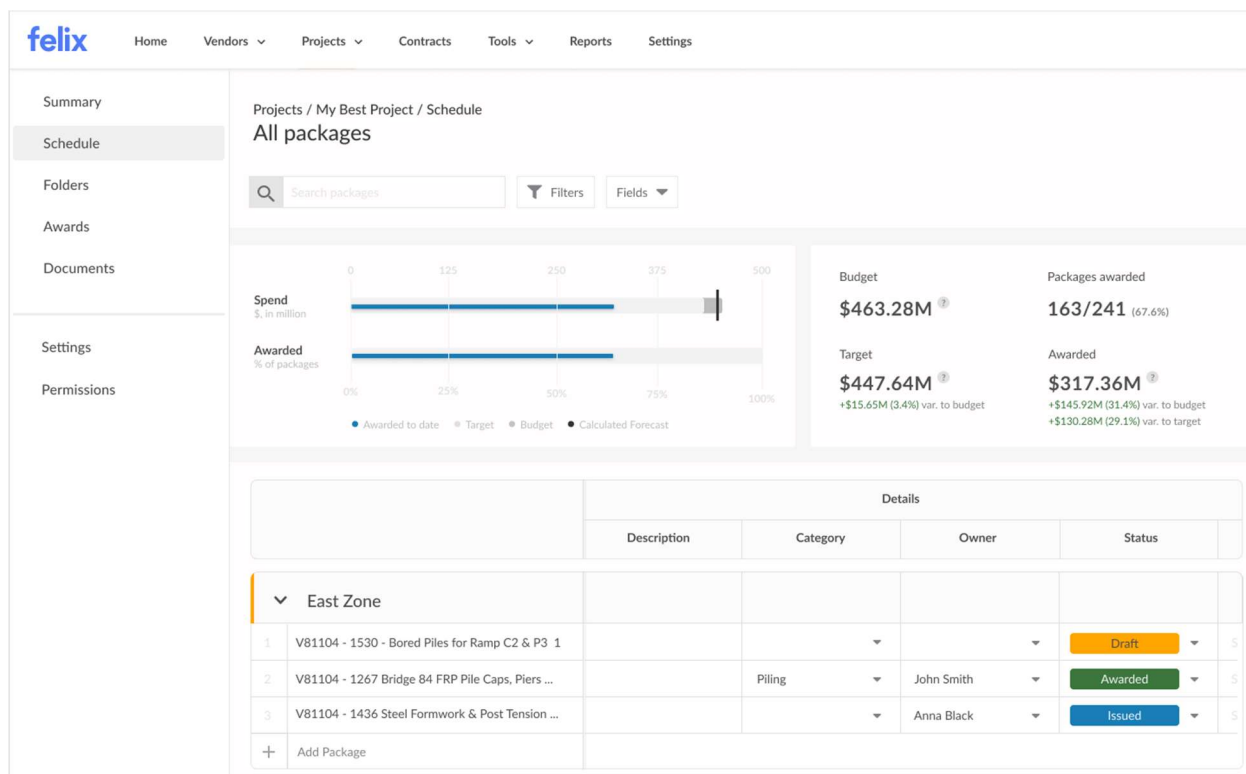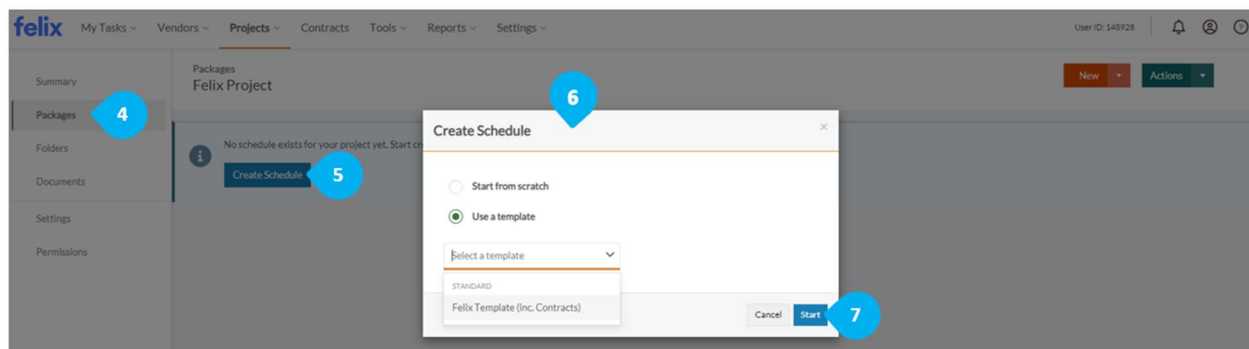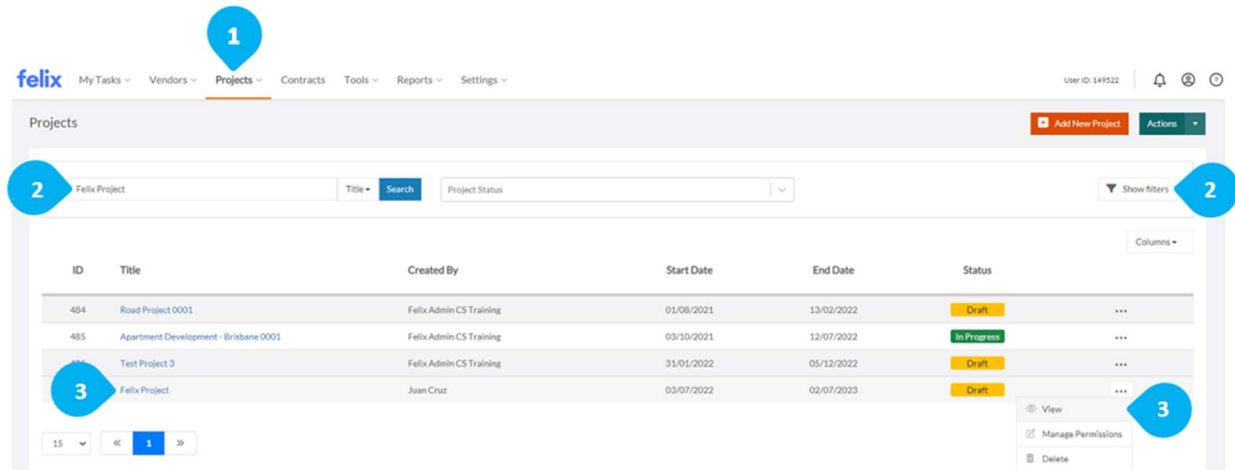

CREATING A PROCUREMENT SCHEDULE

Every procurement schedule belongs to a project on Felix. Once you create a project, a procurement schedule is not automatically created. You can create a procurement schedule once per project. Changes to the schedule configuration can then be made without affecting the template. Follow the steps below on creating a procurement schedule.

To create a procurement schedule:
1. Navigate to your **Projects**.
2. Locate the project you want to create a procurement schedule by using the quick search or filters.
3. Click on the **Project Title** or hover over the **ellipsis icon** and select **View** from the options.
4. On the left side, click **Packages**.
5. Click **Create Schedule**.
6. Select from the options:

- **Start from scratch** - This will pre-create a few basic columns to get you started when creating a schedule. Use this option if you don't have a template or if you want to create a unique schedule for a specific project.
- **Use a template** - This would let you select a template from the dropdown.
7. Click **Start**. You will see a set of columns created.

Notes:

- You can only create a procurement schedule once per project.
- Once created, it is not possible to remove the procurement schedule.

PROCUREMENT SCHEDULE VIEWS

Procurement schedule views are created in relation to a project. Every project can have different views.

Procurement schedule views help you to create quick access to most commonly used configurations of procurement schedules. It helps you to navigate faster, find an information faster, and allows you to focus on what is important in a specific task.

What constitutes a view

A procurement schedule view is a collection of hidden fields where you can filter and sort packages and save the filters and sorts you applied in the view.

How to create a view

Views are created by Felix. If you require a view created or updated, reach out to help@felix.net and include the following:

- View name
- Columns you would like to see in the view

Notes:

- All views visible in a project are visible to all users who can access the procurement schedule.
- Clicking the **View full table** will show all the fields in the table unfiltered and unsorted.

It is recommended to configure a standard default view for a template to avoid modifying views frequently.

Editing and deleting a view

Since there is no UI to create views, editing and deleting views as well can be done upon reaching out to the Support team via help@felix.net.

Notes:

- Deleting a column while in a view will delete the column from the entire procurement schedule.
- Adding a column while in a view will save the column to the current view and not to any other views.
- Moving a column will be reflected across all views and not to a specific view.

# CREATING AND MANAGING COLUMN GROUPS

A column group is a set of columns which can be related to each other.

Note: The first column group is frozen by default.

Creating a column group

A column is automatically created when you create a column group. To create a column group:

1. Click the **plus icon** in the column group name that appears on hover and select **Create new column group**.
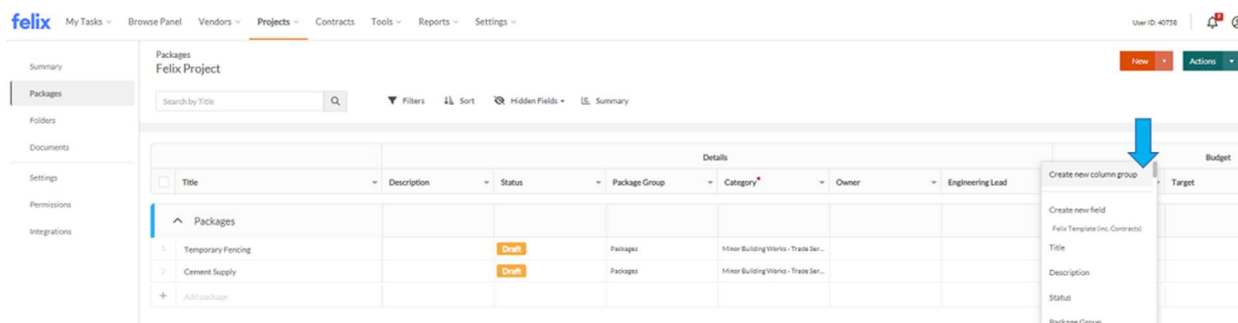
2. Enter the **Group name**.

3. Click **Save**.

Note: Column groups are the ones located in the first row of the template.

Editing a column group

To edit a column group:

1. Hover over the column group name.
2. Click the small down arrow that appears on hover.
3. Click **Edit**.

4. Enter a new name.

5. Click **Save**.

Reorganizing a column group

To reorganize a column group:
1. Hover over the column group name.
2. Click the small down arrow that appears on hover.
    - Click **Move Right** from the dropdown menu if you want to move the column group to the right.
    - Click **Move Left** from the dropdown menu if you want to move the column group to the left.
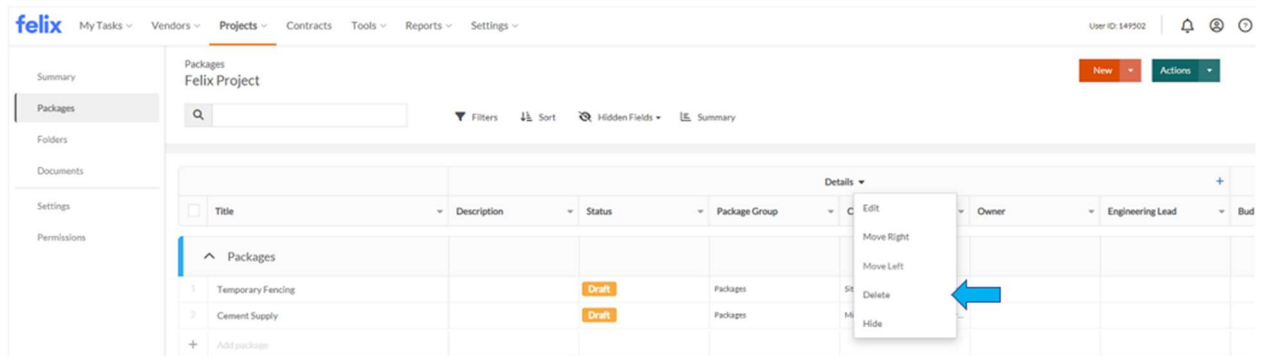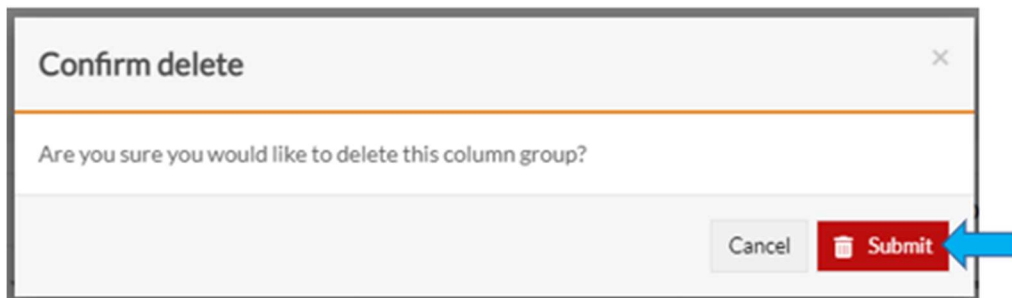

Deleting a column group

To delete a column group:
1. Hover over the column group name.
2. Click the small down arrow that appears on hover.

3. Select **Delete** from the dropdown menu.
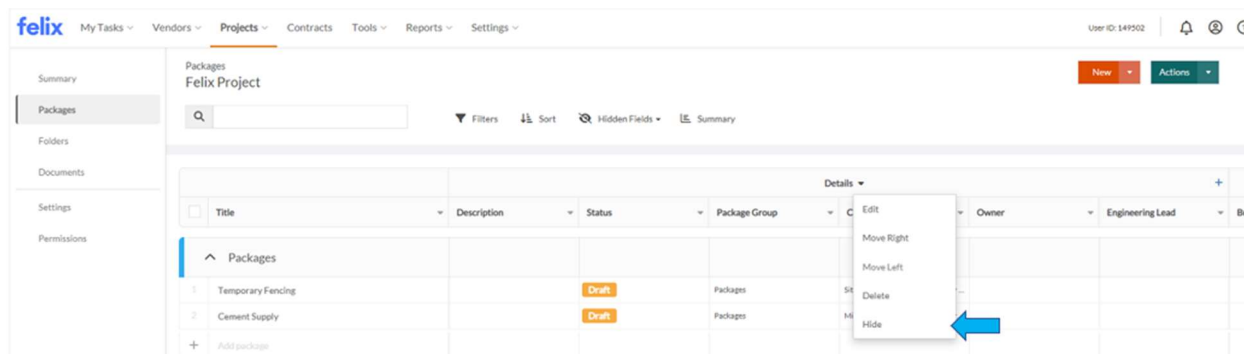

4. Click **Submit** to confirm the deletion.

Note: Deleting a column group will delete all columns within the column group.

Hiding a column group

To hide a column group:

1. Hover over the column group name.
2. Click the small down arrow that appears on hover.
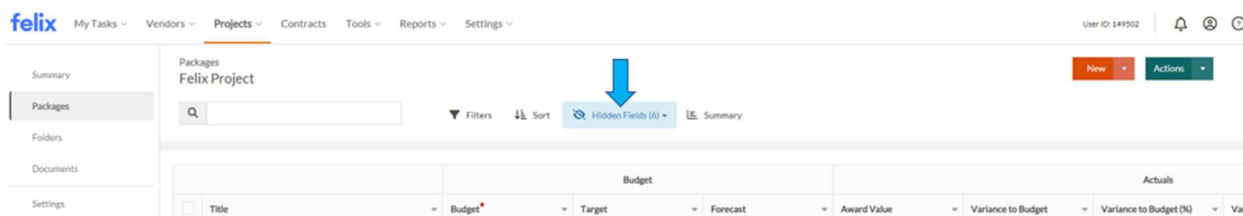3. Click **Hide** from the dropdown menu.

Note: Hiding a column group will hide all columns associated to it.
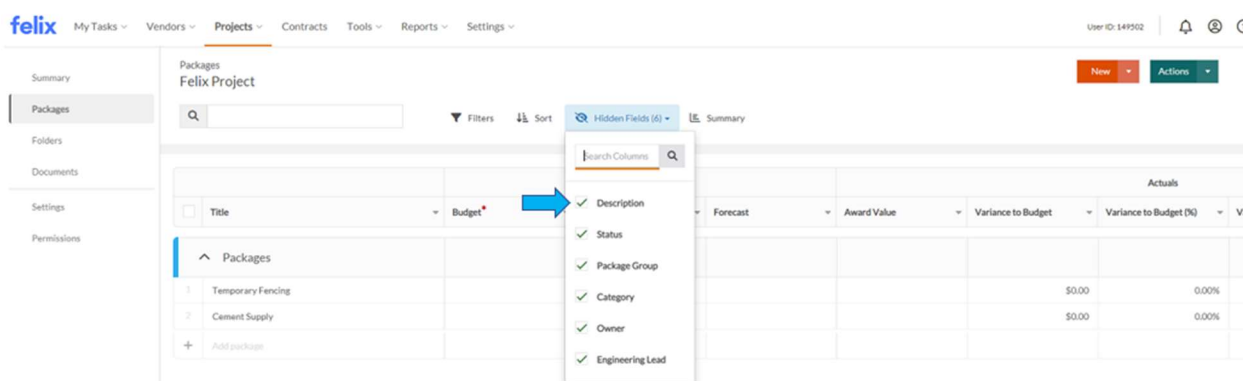
Unhiding a column group

To unhide a column group:

1. Click the **Hidden Fields** link beside the search bar.

2. Select the column name/s which belong to the column group you want to unhide by clicking the checkbox to uncheck. You can also use the search bar to search columns and click the checkbox to uncheck. This will unhide the column group.

**Note**: You can unhide one or multiple columns in a column group to unhide the column group.

RESTRICTING ACCESS TO COLUMN GROUPS

You can restrict the access of a user or a team to a column group. This provides flexibility to users to configure access and ensures that sensitive information can only be access by appropriate users within the procurement schedule.

Adding a user or a team permission to a column group
To add a user or a team permission:
1. Locate the column group you want to restrict access to users on the procurement schedule.
2. Hover over the column group name and click the small down arrow that appears.
3. Select **Manage group permission**.
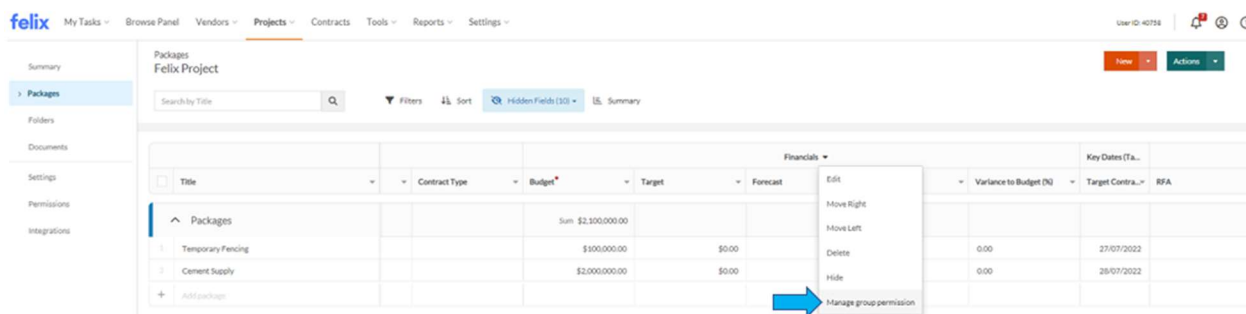
4. Select from the options:
   - **Anyone can view and edit cells in this field group**
   - **Select people and teams who have access**- Selecting this option allows you to select a specific user or team as well as managing their access type.

- To add a user or a team, click **Add permission**.

- Select a **User or team** and their **Access** type from the dropdown then click **Save**.

Notes:

- A restricted column group will have an **exclamation icon** before the column group name.
- View and edit access to column groups allows you to view the columns and/or edit the cell values on the procurement schedule.
- Permissions will apply to all columns within the column group.
- If you are using Procurement Schedule Views, restrictions will apply to all views where these columns are used.
- Restricted column groups won't be included on the procurement schedule export if the column group is restricted for the user who is performing the export. This applies both to **Export current view** and **Export all data** features.
- A user will be able to view **Budget**, **Target**, and **Forecast** fields in the RFQ workflow even if they can't access them on the procurement schedule.
- If you would like a user to always see all restricted groups, use **View Restricted Column Groups** permission in security groups.
- If you would like a user to always be able to edit all restricted groups, use **View Restricted Column Groups** and **Edit all packages** permissions in security groups.

CREATING AND MANAGING COLUMNS

Columns, also known as fields, allow users to enter and calculate details displayed within a procurement schedule. Columns are organised into groups and can be hidden, filtered, and sorted.
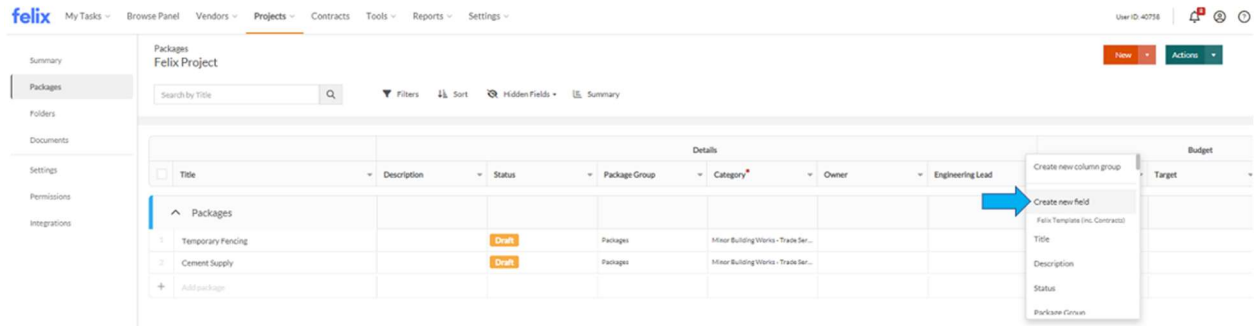
Notes:

- The first column cannot be edited or deleted by default.
- The first column is frozen by default.

Creating a column

To create a column, there are two options:
- First option: Click the **plus icon** in the column group name that appears on hover and select **Create new field** or select a column name based on the available templates.

- Second option: Click the small down arrow in the column name where you would want to add the new column and select these options.
  - **Insert Field to the Right** - Select this to add a column to the right.
  - **Insert Field to the Left** - Select this to add a column to the left.
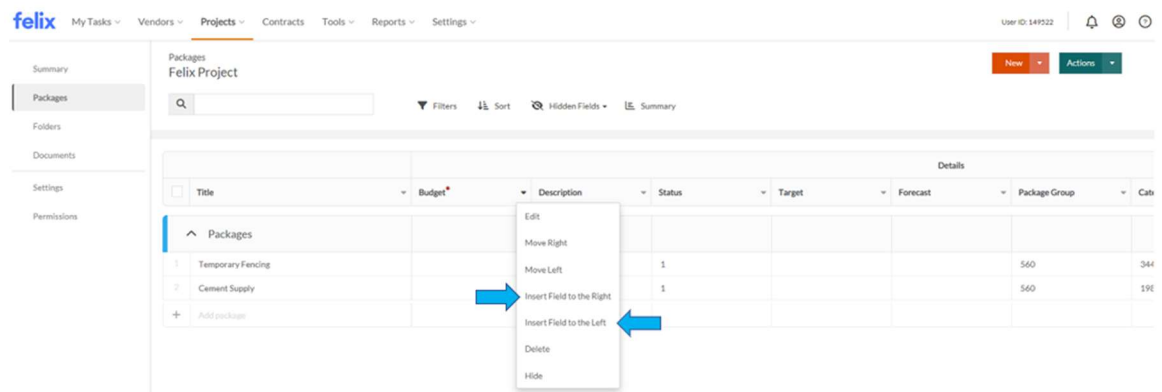
Note: Columns are the ones located in the second row of the template.

Editing a column

To edit a column:

1. Click the small down arrow in the column name.

2. Click **Edit**.

3. Update the following based on your preference:
    - **Name**
    - **Type**
    - **Size**
4. Click **Save**.

Reorganizing a column

To reorganize a column:

1. Hover over the column name.
2. Click the small down arrow that appears on hover.
   - Click **Move Right** from the dropdown menu if you want to move the column to the right.
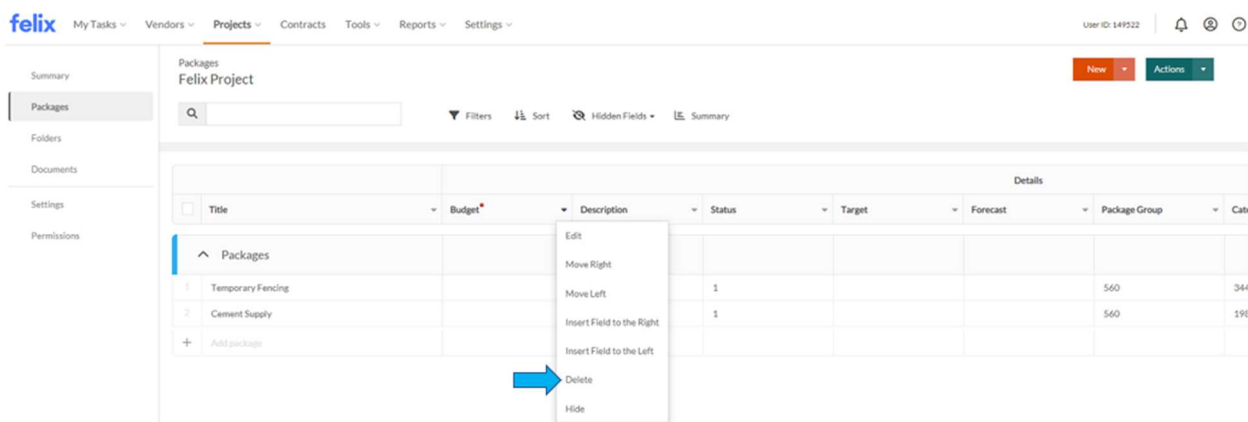   - Click **Move Left** from the dropdown menu if you want to move the column to the left.
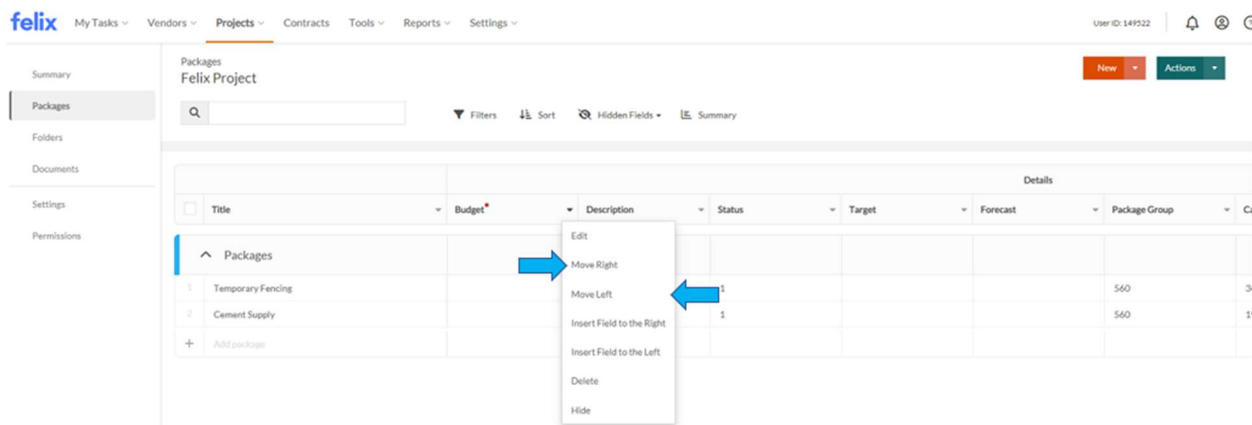
Note: You cannot move columns between column groups.

Deleting a column

To delete a column:
1. Hover over the column name.
2. Click the small down arrow that appears on hover.
3. Select **Delete** from the dropdown menu.
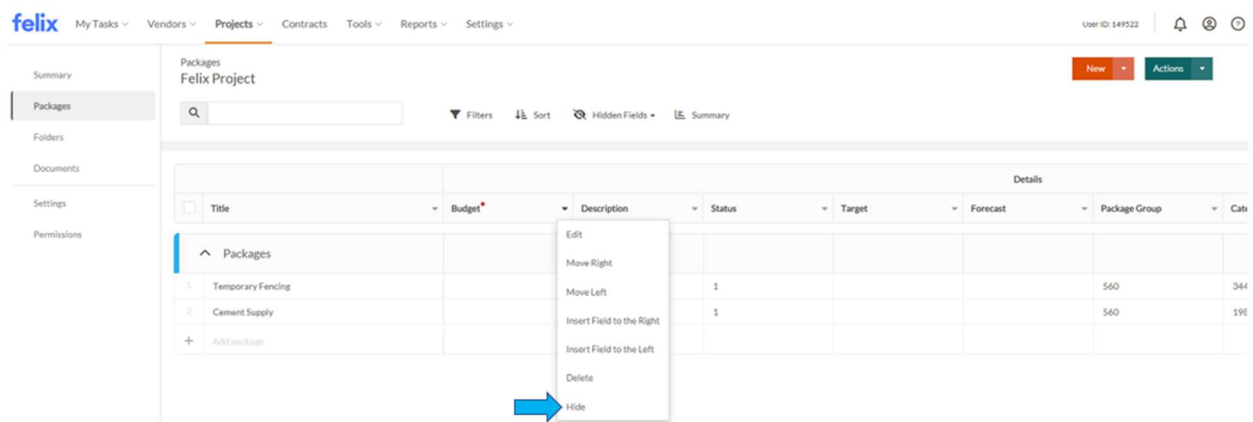
4. Click **Submit** to confirm the deletion.

Note: Deleting a column will delete the data associated with the column for all packages in the schedule and there is no option to restore it.
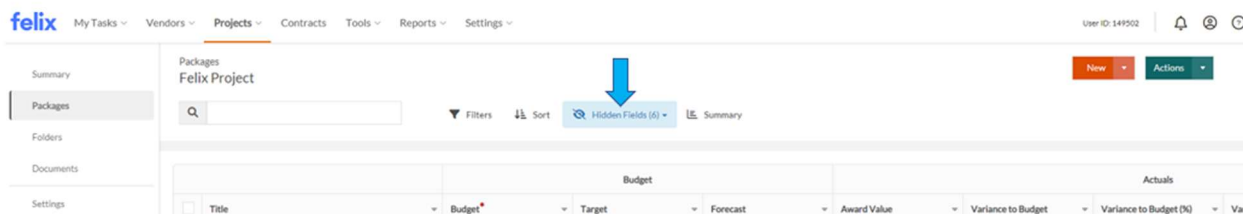
Hiding a column

To hide a column:
1. Hover over the column name.
2. Click the small down arrow that appears on the hover.
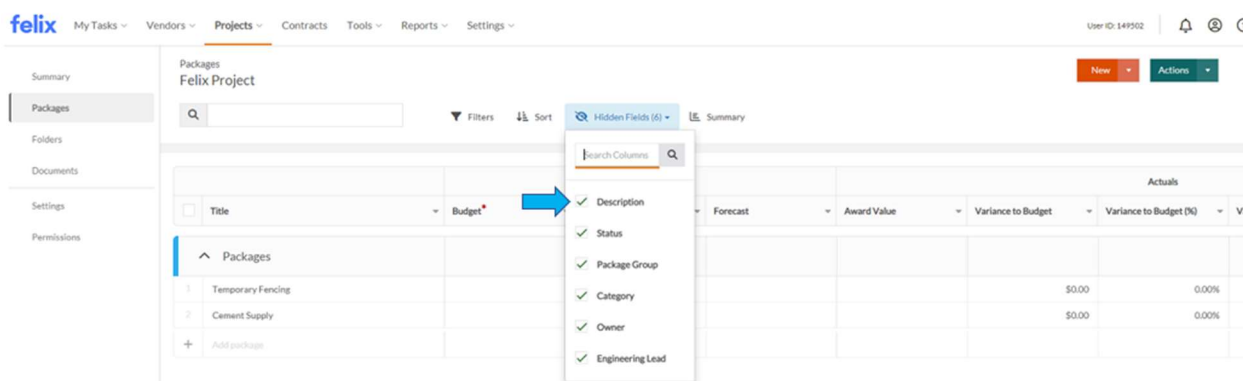3. Click **Hide** from the dropdown menu.

Unhiding a column

To unhide a column:

1. Click the **Hidden Fields** link beside the search bar.

2. Select the column name/s you want to unhide by clicking the checkbox to uncheck. You can also use the search bar to search columns and click the checkbox to uncheck. This will unhide the column.

Note: The number in brackets showing in Hidden Fields link tells you how many columns were hidden.

COLUMN TYPES AND THEIR SETTINGS

You can configure the settings of a column either you created a template of your own or used a standard or a client specific template.

Column Type	Description	Used Cases	Column Setting
Short Text	Captures small amount of information		• Has a limit of characters and is returned in a single line • Alphanumeric characters • Default column width is M. • Text is left aligned.

Column Type	Description	Used Cases	Column Setting
Long Text	Captures more amount of information	• Comments • Descriptions	• No limit of characters and wraps around according to the length of the text • Alphanumeric characters • Default column width is M. • Text is left aligned.
Single Select	Allows you to create a dropdown list of options and select only one option at a time	• Contract Type • Risk Profile	• Has an **Add Option** and can be deleted • No limit of the number of options that can be added • Default column width is M.
Multi Select	Allows you to create a dropdown list of options and select multiple options at the same time	• Region	• Has an **Add Option** and can be deleted • No limit of the number of options that can be added • Default column width is M.
Date	Allows you to select the date and has an option to add into the weekly digest		• Date format is dd/mm/yyy. • **Include this date in weekly digests** - This allows you to receive a summary of packages and dates that are coming up for the week and is generated every Monday. • Default column width is M.
Number	Captures numbers		• **Allow decimals** - This will show the numbers in decimal • **Show as percentage** - This will show the numbers in percentage • **Show column SUM** - This will show the sum of the numbers in the column located at the package group title. • **Default Value** - This allows you to set a standard interval between key dates and it is automatically populated based on the value you have

Column Type	Description	Used Cases	Column Setting
			set. Only applies to new packages. • Default column width is M. • Number is right aligned.
Currency	Allows you to enter a symbol which will be displayed next to the numerical value This is not tied to project currency.		• **Symbol** - Enter the symbol in this text box and it will show up in the table as default. Default symbol is $ but this can be updated. • **Allow decimals** - This will show the numbers in decimal • **Show column SUM** - This will show the sum of the numbers in the column located at the package group title. • Default column width is M. • Currency is right aligned.
Calculation	Allows you to calculate between two columns Certain columns allow certain calculations.		• **First Column and Second Column** - These are the columns to be calculated which should be preselected first before the Operator. • **Operator** - Select the required operator to perform the calculation between the columns. Default symbol is + but this can be updated. • **Display as comparison** - Positive value will be in green and negative value will be in red. • **Show column SUM** - This will show the sum of the numbers in the column located at the package group title. • Default column width is M. • Calculation is right aligned.
Category	Allows you to add categories enabled for your organisation to a package		• Default column width is M.

Column Type	Description	Used Cases	Column Setting
Package Group	Allows you to switch packages between package groups		• Required column • Default column width is M.
Package Status	Describes the status of a package There is a standard status used but can be configured.		• Required column • You cannot change the status of a package if required columns are not populated. • Default column width is M.
Package Owner	Allows you to select a user as the owner of the package		• **Notify user when added to a package** - The user will be notified via email. • **Send weekly digest** - The user will receive a summary of packages and dates that are coming up for the week and is generated every Monday. • Default column width is M.
RFQ	Allows you to add RFQs		• This is a hyperlink to the RFQ. • Default column width is M.
RFA	Allows you to recommend vendor for award This is an internal approval process which includes the basic information of the package and the value of the award to be approved by managers before the contract is executed.		• This is a hyperlink to the RFA. • Default column width is M.
User	Allows you to select one or multiple users and assign tasks This is a list of users in the organisation.		• **Notify user when added to a package** - The user will be notified via email. • **Send weekly digest** - The user will receive a summary of packages and dates that are coming up for the week and is generated every Monday. • User is Single Select. To add multiple users, add multiple columns.

Column Type	Description	Used Cases	Column Setting
			• Default column width is M.
Vendor	Allows you to select a vendor		• Default column width is M.
Contract	This is a list of contracts.		• Default column width is M.
Lookup	Allows you to pull information from an object based on a certain field		• **Entity Column** - This is the object where you would need the information. • **Field** - This is where the information is pulled. • Default column width is M.

CREATING AND MANAGING PACKAGE GROUPS

Package groups are an organisational feature that allow users to segment packages within procurement schedules. They can be used to represent stages, zones, or anything else you might use to organise your work within a project.

Creating a package group

To create a package group:

1. Click **New > Package Group** at the top right corner.
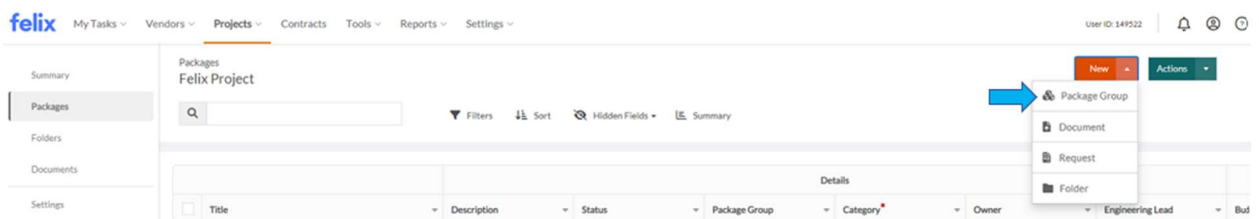
2. Enter a **Title** for the package group.
3. Select a **Colour** to represent the package group.
4. You have the option to restrict the access of a user or a team to a certain package group. Refer to *Restricting Package Groups Visibility*.

5. Click **Save**.

Editing a package group

To edit a package group:
1. Hover over the package group title.
2. Click the small down arrow that appears on hover.
3. Click **Edit** from the dropdown menu.

4. Make the necessary changes.

5. Click **Save**.

Reorganizing a package group

To reorganize a package group:

1. Hover over the package group title.
2. Click the small down arrow that appears on hover.
   - Click **Move up** from the dropdown menu if you want to move the package group up.
   - Click **Move down** from the dropdown menu if you want to move the package group down.

Deleting a package group

To delete a package group:

1. Hover over the package group title.

2. Click the small down arrow that appears on hover.
3. Select **Delete** from the dropdown menu.
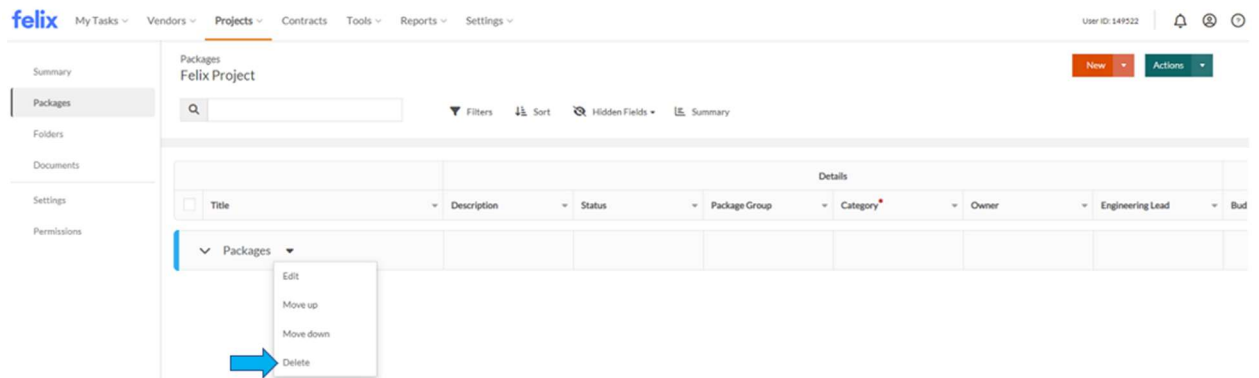
4. Click **Delete** to confirm the deletion.
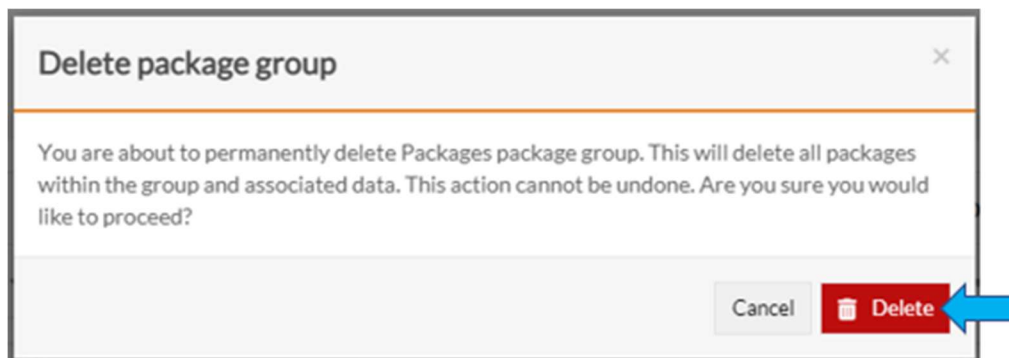
RESTRICTING PACKAGE GROUPS VISIBILITY

You can restrict the access of a user or a team in a package group.

Adding a user or a team permission to a package group

To add a user or a team permission:
1. Click **Restrict access to package group** checkbox.
2. Click **Add new permission**.
3. Select a **User or Team** and their **Access Type** from the dropdown.
4. Click **Save**.

Adding additional user or team permission to a package group

To add additional user or team permission:

1. Click **Add new permission**.
2. Select a **User or Team** and their **Access Type** from the dropdown.
3. Click **Save**.

Removing a user or a team permission to a package group

To remove a user or a team permission:

1. Click on the **trash bin icon**.
2. Click **Save**.
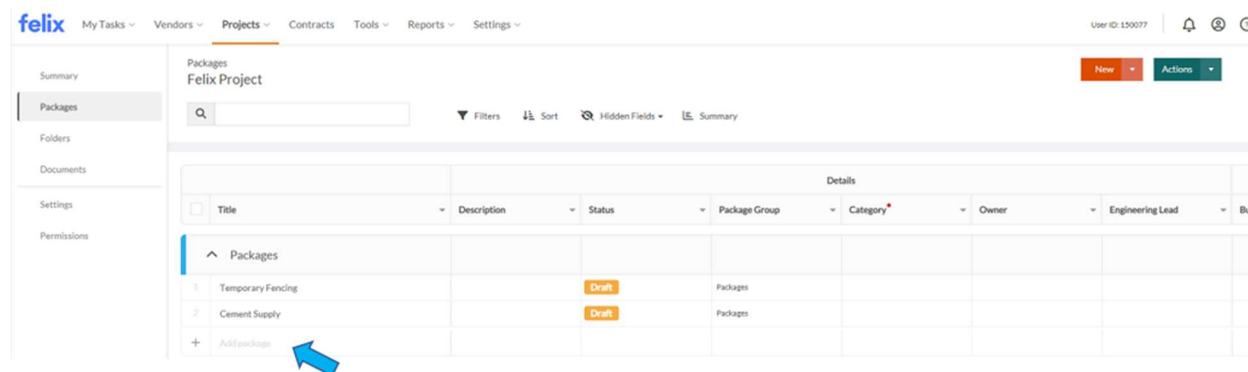
CREATING AND MANAGING PACKAGES

Every package must belong to a package group.

Creating a package

To create a package:

1. Make sure to create a package group first to create packages.
2. Double click the cell which has a plus sign next to it.
3. Enter the package title.
4. Press **alt** in your keyboard to save.

Note: Another option to create a package is by importing a CSV file which pre-creates a bulk number of packages at once.

Viewing a package

To view a package:

1. Hover over the package title.
2. Click the small down arrow that appears on hover.
3. Select **View** from the dropdown menu. You can view the package details in full view.

Notes:

- You can share the information of the package to other project team members by copying the link in your browser.
- You can leave comments in a package.

Editing a package

To edit a package:

1. Locate the package title you want to edit.
2. Double click on the cell you want to edit.
3. Make the necessary changes.
4. Press **alt** in your keyboard to save.

Notes:

- You can edit a package upon viewing in full view.
- You cannot edit the package title when in full view.

Reorganizing a package

To reorganize a package:
1. Hover over the package title.
2. Click the small down arrow that appears on hover.
    - Click **Move up** from the dropdown menu if you want to move the package up.
    - Click **Move down** from the dropdown menu if you want to move the package down.
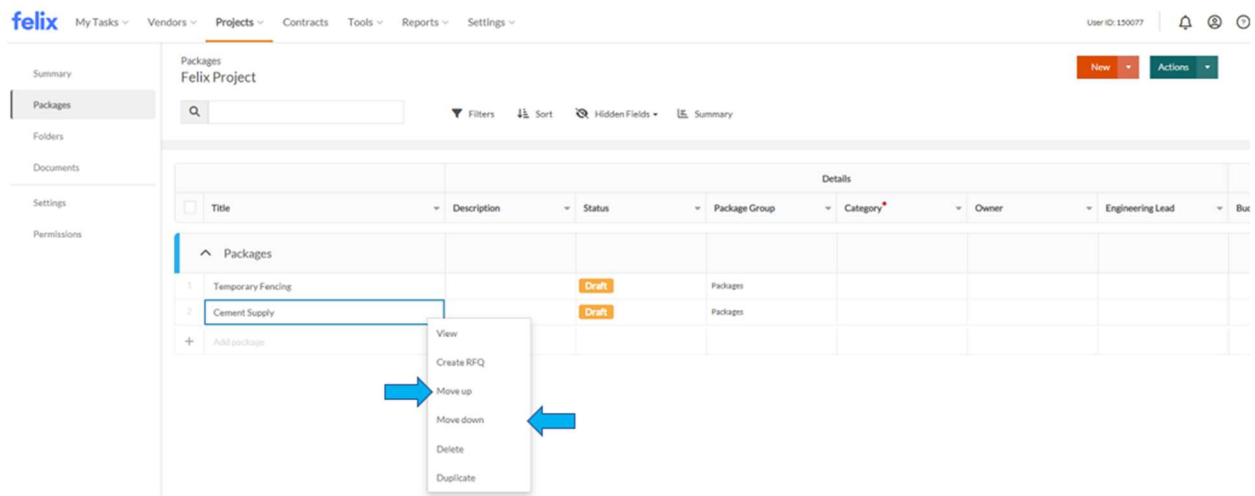
Deleting a package

To delete a package:
1. Hover over the package title.
2. Click the small down arrow that appears on hover.
3. Select **Delete** from the dropdown menu.
4. Click **Delete** to confirm the deletion.

Duplicating a package

To duplicate a package:

1. Hover over the package title.
2. Click the small down arrow that appears on hover.
3. Select **Duplicate** from the dropdown menu.

FILTERING COLUMNS

Filtering columns on the procurement schedule allows you to pull a certain data set which helps you find the information you need faster.

Applying a filter

To apply a filter:

1. Click the **Filters** link beside the search bar.
2. Click **Add new filter**.
3. Select the column name in the first field.
4. Select the operator in the second field.
5. Enter the value you are looking in the third field. If it is a dropdown, select from the options.
6. Click the **Apply Filters** button.
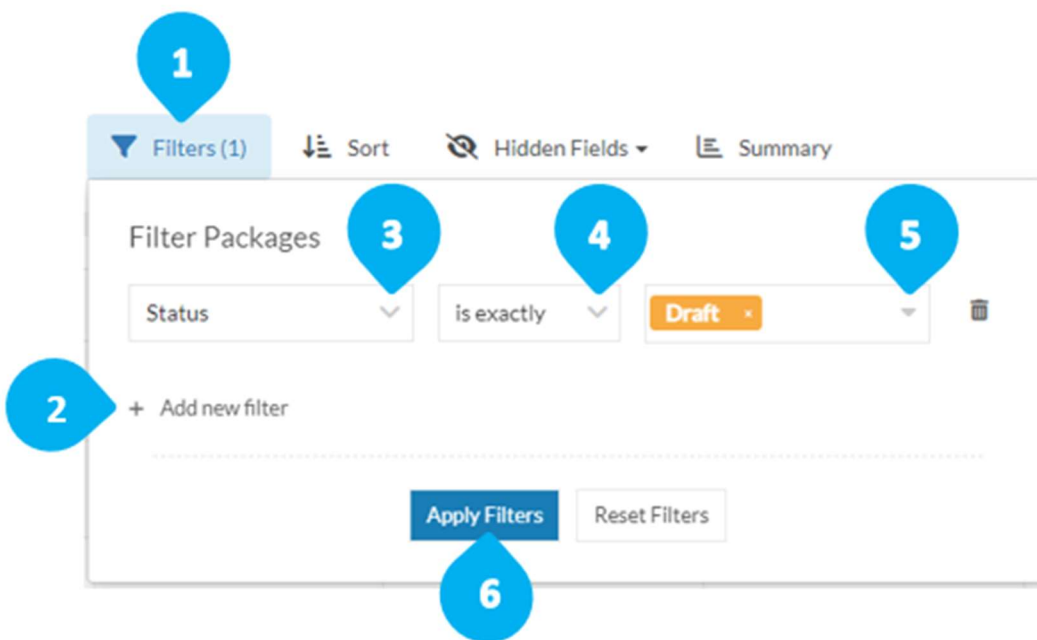
Notes:

- Operator depends on the column type selected in the first field.
- The number in brackets showing in Filters link tells you how many filters were applied.

Adding multiple filters

To add multiple filters:

1. Click **Add new filter**.
2. Select the column name in the first field.
3. Select the operator in the second field.
4. Enter the value you are looking in the third field. If it is a dropdown, select from the options.
5. Click the **Apply Filters** button.
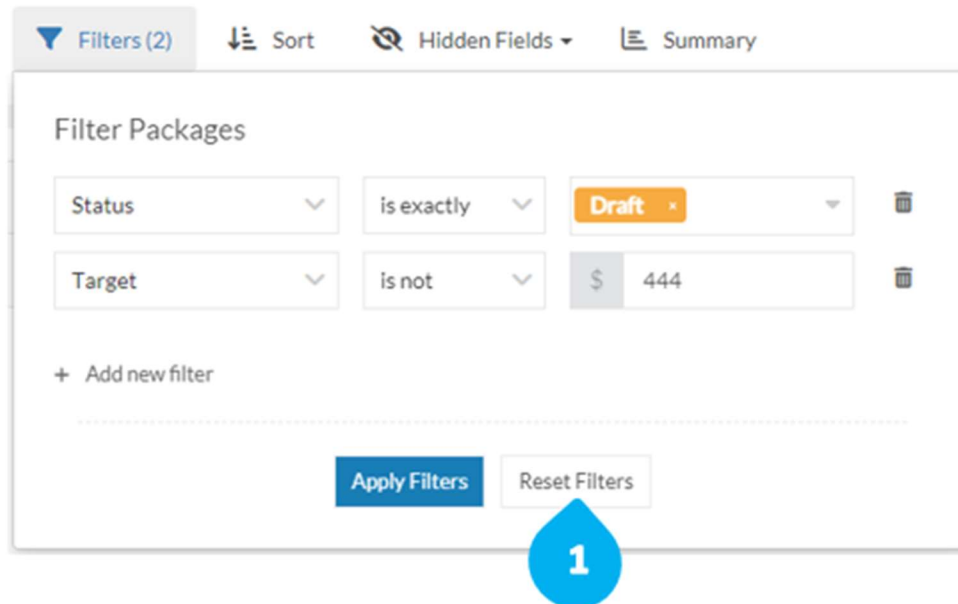

Deleting a filter

To delete a filter:
1. Click the **trash bin icon**.
2. Click the **Apply Filters** button.
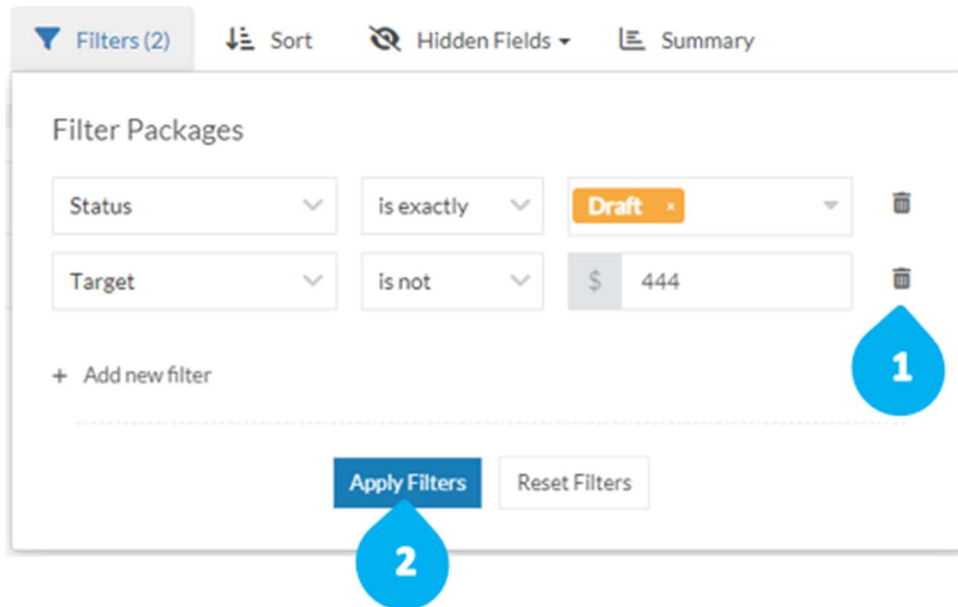
Resetting filters

To reset filters:

1. Click the **Reset Filters** button.

SORTING COLUMNS

You can sort columns on the procurement schedule from ascending to descending order or vice versa.

Applying a sort

To apply a sort:
1. Click the **Sort** link beside the search bar.
2. Click **Add new field to sort by**.
3. Select the column name in the first field.
4. Select on how you would like to sort in the second field.
   - **sort A - Z** - This will sort the field in an ascending order.
   - **sort Z - A** - This will sort the field in a descending order.
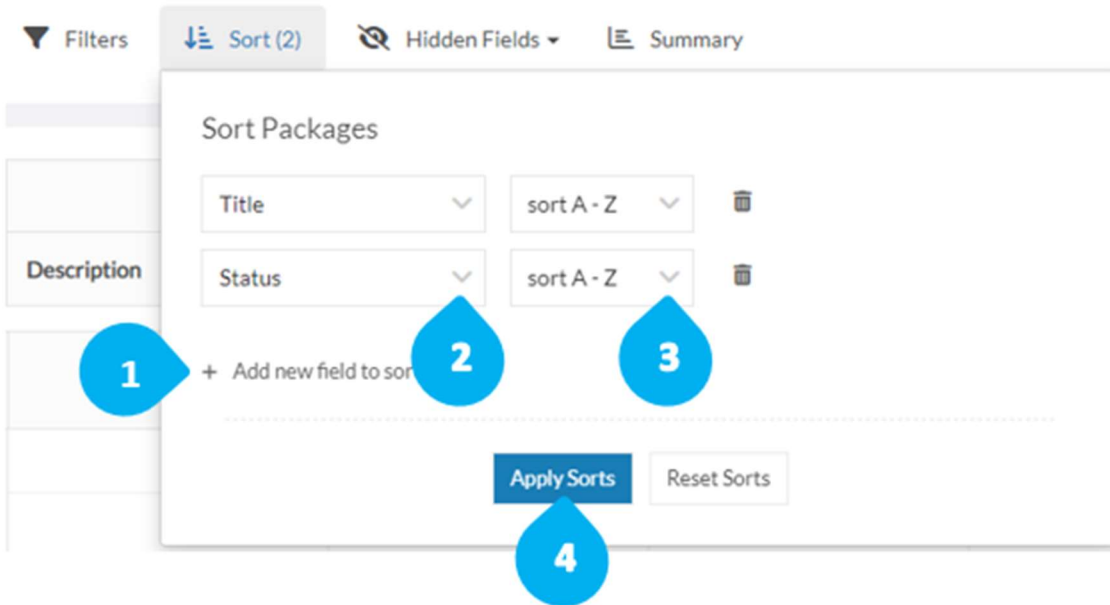5. Click the **Apply Sorts** button.
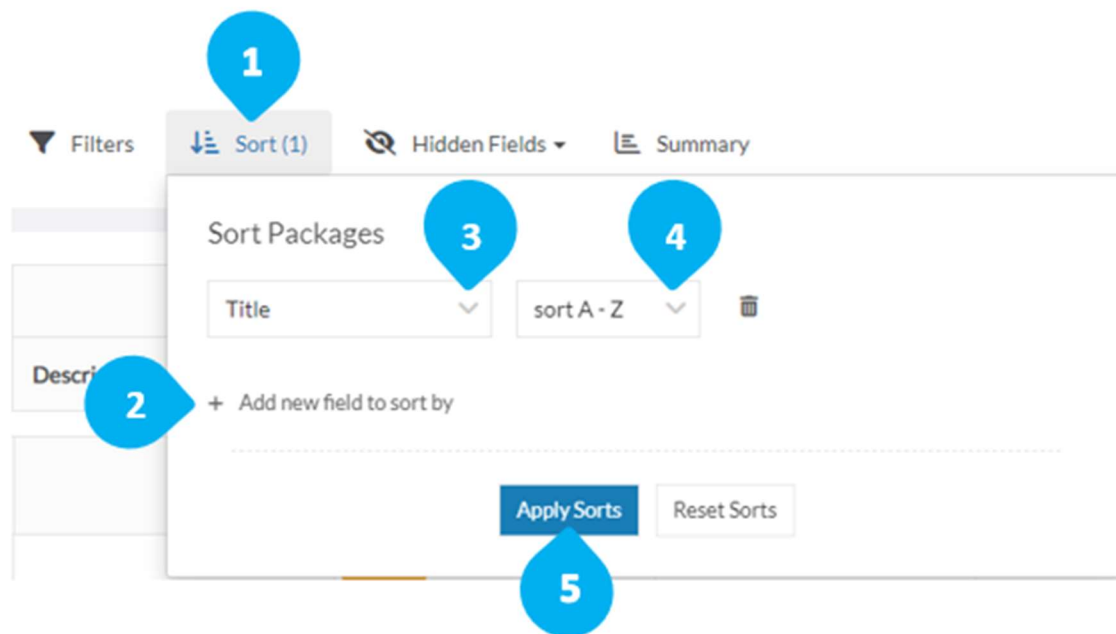
Note: The number in brackets showing in Sort link tells you how many sorts were applied.

Adding multiple sorts

To add multiple sorts:
1. Click **Add new field to sort by**.
2. Select the column name in the first field.
3. Select on how you would like to sort in the second field.

- **sort A - Z** - This will sort the field in an ascending order.
- **sort Z - A** - This will sort the field in a descending order.
4. Click the **Apply Sorts** button.
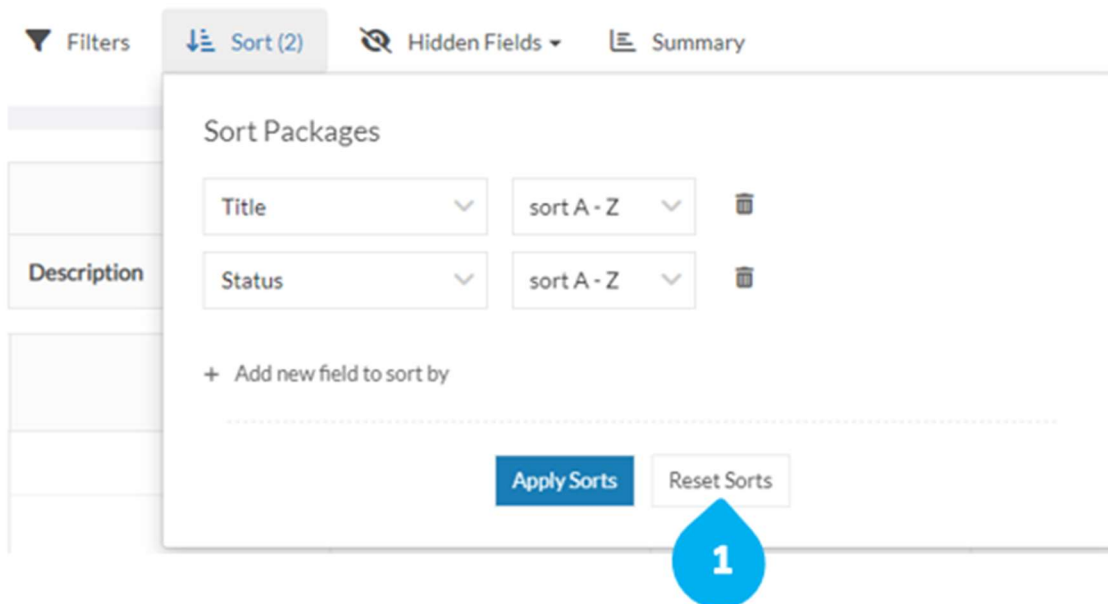

Deleting a sort

To delete a sort:
1. Click the **trash bin icon**.
2. Click the **Apply Sorts** button.
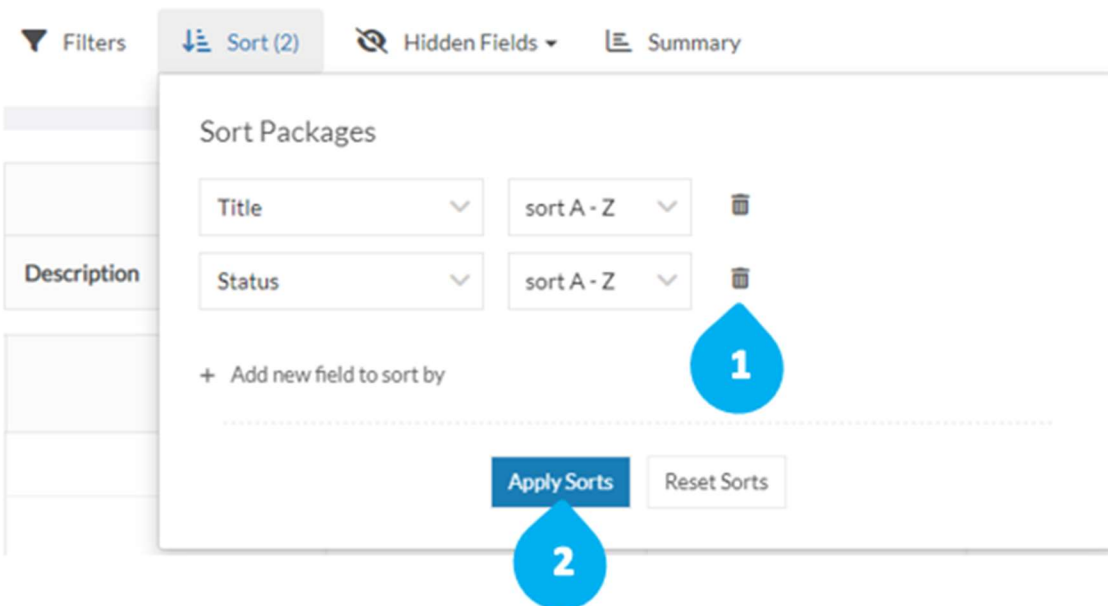
Resetting sorts

To reset sorts:

    1.   Click the **Reset Sorts** button.

CREATING AN RFQ FROM A PACKAGE

Creating an RFQ from a package can be done on a procurement schedule.

Creating an RFQ from a package
To create an RFQ:
1. Select the package which you will be adding an RFQ for.
2. Hover over the package title.
3. Click the small down arrow that appears on hover.
4. Select **Create RFQ** from the dropdown menu.

5. Select which **Folder** the RFQ will be created to from the dropdown menu.
6. Select the project details which you would like to be copied into the request by clicking the checkboxes.

7. Click the **Create** button. You will be taken to a new page to create the RFQ.

8. In **Job Summary** tab, fill out the following fields:
   - **Project** - This is auto-populated.
   - (Required) **Folder** - This is auto-populated.
   - (Required) **RFQ Name** - This is auto-populated.
   - (Required) **Job Type**
   - (Required) **When do you need quotes back by?**
   - **Start Date**
   - **End Date**
   - **Scope**
   - (Required) **Area/Region**
   - **Location Details**
   - (Optional) **User notifications** - Click the checkbox to receive an email notification each time a vendor provides a quote.

- (Optional) **Quote Updates** - Click the checkbox if you would like to lock pricing when it is submitted by a vendor.
- (Required) **Close Date Settings**
  - **Select a single date for this RFQ** - Select this to have one deadline for all services included in the RFQ.
  - **Use separate dates for each service** - Select this to set different deadlines for each service.

9. Review the **RFQ Owner** section details.
10. Click the **Next: Documents** button.
11. In **Documents** tab, upload all relevant documents for the RFQ. This can be skipped if there is no document to upload.
12. Click the **Next: Add Services** button.
13. In **Add Services** tab, you can edit the service/s you have selected under **Selected Services** section by clicking the **edit icon**. If you want to add a service, click the search bar or enter the service you want to add to search.
    - The **Pricing Requirements** section is required to fill out.
14. Click the **Next** button.
15. In **Vendors List** tab, review the RFQ details as well as the vendors that matched to the RFQ.
16. Click the **Next** button.
17. In **Approval and Send** tab, you can request approval from other organisation users and send the RFQ to vendors for quoting.
18. Once completed, the RFQ will be linked to the package. You will see this under the RFQ column.

Notes:

- When creating an RFQ, some of the fields are subject to custom configuration and may not be visible to you as per your organisation's requirements. If a field is not applicable to you, you can move on to the next step.
- You can have multiple packages in a single RFQ.
- The Approval and Send process requires **Approval Workflow** feature to be enabled in your organisation.

LINKING AN RFQ TO A PACKAGE

Unlinked RFQs can be link to a package on the procurement schedule.
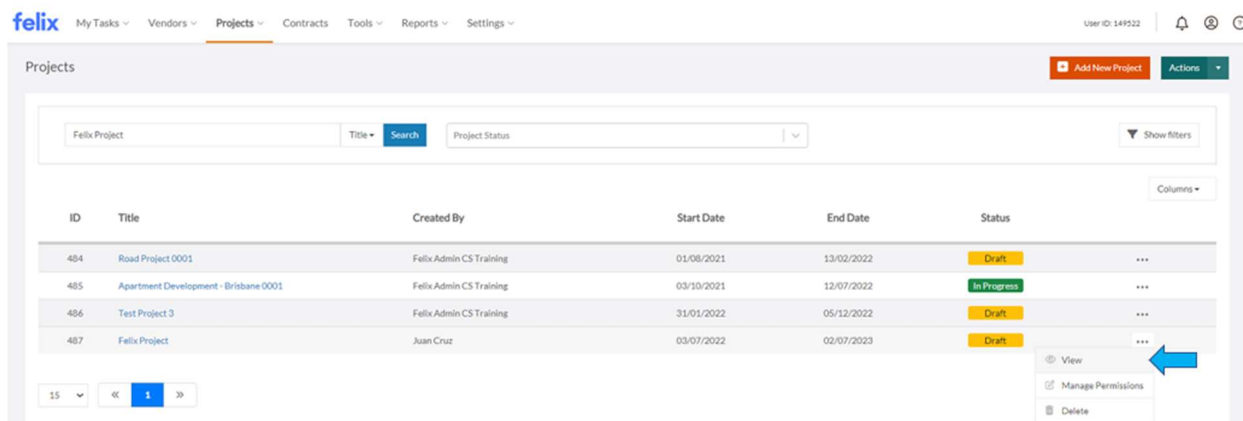
Linking an RFQ to a package
To link an RFQ to a package:

1. Navigate to your **Projects**.

2. Locate the project where you created the RFQ using the quick search or filters.
3. Click on the **Project Title** or hover over the **ellipsis icon** and select **View** from the options.

4. On the left side, click **Packages**.
5. Locate the package where the RFQ will be linked to.
6. In **RFQ** column, click the small arrow that appears when clicked.
7. Select from the dropdown or enter the RFQ to search.
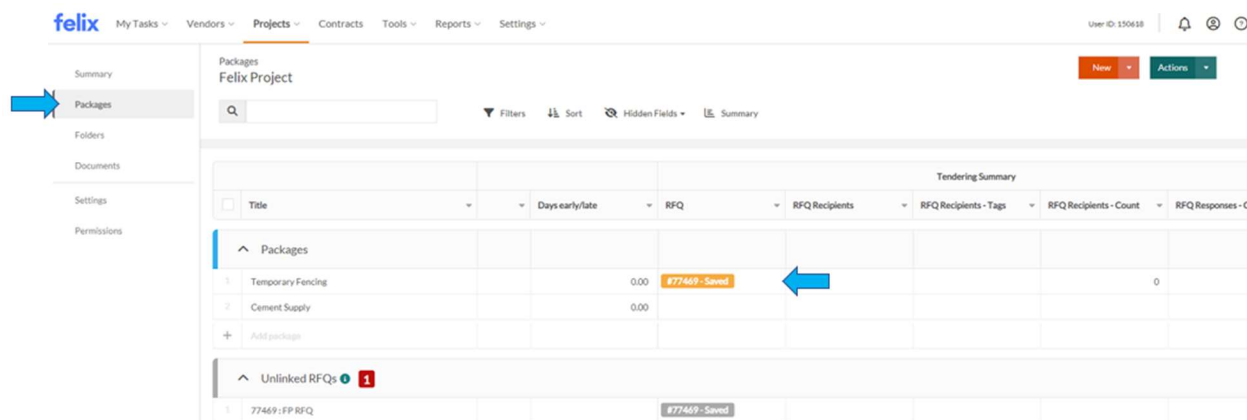
Note: RFQs that are unlink to a package are automatically under **Unlinked RFQs** package group.

IMPORTING A PROCUREMENT SCHEDULE

Importing a CSV file pre-creates a bulk number of packages at once. This can also be used to update a bulk number of packages.

To import a procurement schedule:
1. Click the **Actions** button at the top right corner.
2. Select **Import CSV**.
3. In the popup box, click **this template** to download the template.
4. Fill out the downloaded template and save.
5. To import the template, there are two options:
   - Drop files - Drag the template from the folder where it was saved and drop it in the popup box where it says **Drop files here or click to select files**.
   - Select files - Click the **Drop files here or click to select files** in the popup box, locate the folder where the template was saved, click the template to select, and click **Open**.
6. Click the **Import** button.
7. Select from the following options:
   - **Add new packages** - Every row in the import file will be added as a new package and the existing ones will not be deleted or updated.
   - **Update existing packages** - Only matching packages between the schedule and the import file will be updated.
     - Selecting this, a dropdown field will appear for you to select a column with unique values to match the import file and existing packages.
   - **Update existing packages and add new packages** - Only matching packages between the schedule and the import file will be updated. Non-matching packages will be added as new packages.
     - Selecting this, a dropdown field will appear for you to select a column with unique values to match the import file and existing packages.
8. Click the **Next** button. This will take you to the import preview.
9. If everything looks good, click the **Complete Import** button.

Notes:

- The template should be in a CSV format only.
- You can remove columns in the template and these don't necessarily need to be in the same order as long as the Title column is included and matches the title.

EXPORTING A PROCUREMENT SCHEDULE

You can export an inventory list of packages on a procurement schedule in an excel file.

To export a procurement schedule:
1. Click **Actions** at the top right corner.
2. Select your preference on the three options provided to export the data.
   - **Export current view to CSV** - Exports the data based on the columns or fields that are visible when filtered
   - **Export all data to CSV** - Exports all the data including the hidden columns or fields
   - **Export Audit Log** - Exports activity for each package in the schedule
3. A CSV file will be downloaded automatically.
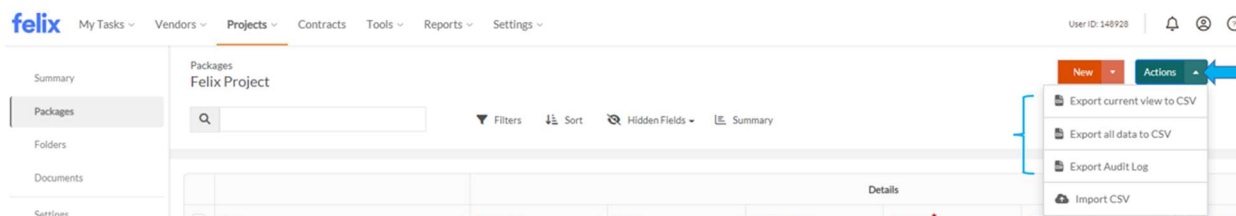
**Note**: Unlinked RFQs are not included when exporting data.

COMMENTING AND MANAGING COMMENTS

Users can leave a comment, as well as edit, delete, and view comments in a package. This helps other project team members understand the activity history of a package.
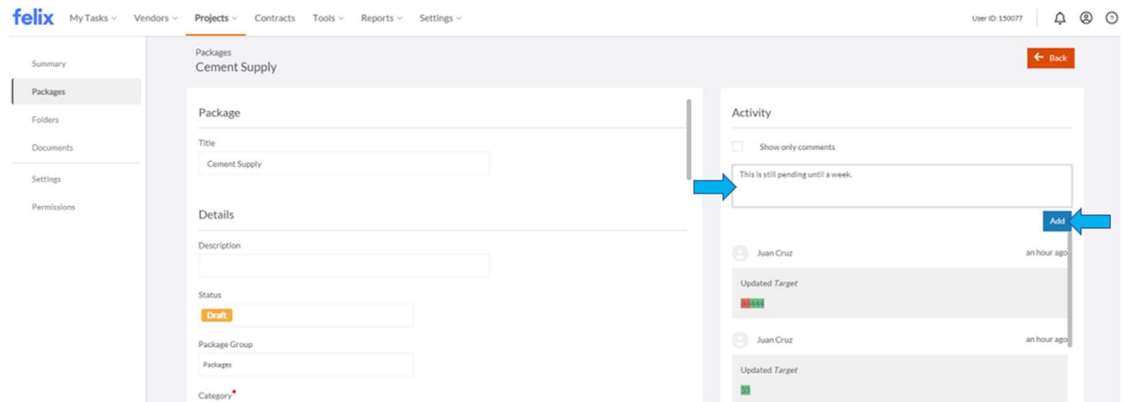
Leaving a comment
To leave a comment:
1. Hover over the package title.
2. Click the small down arrow that appears on hover.
3. Click **View**.
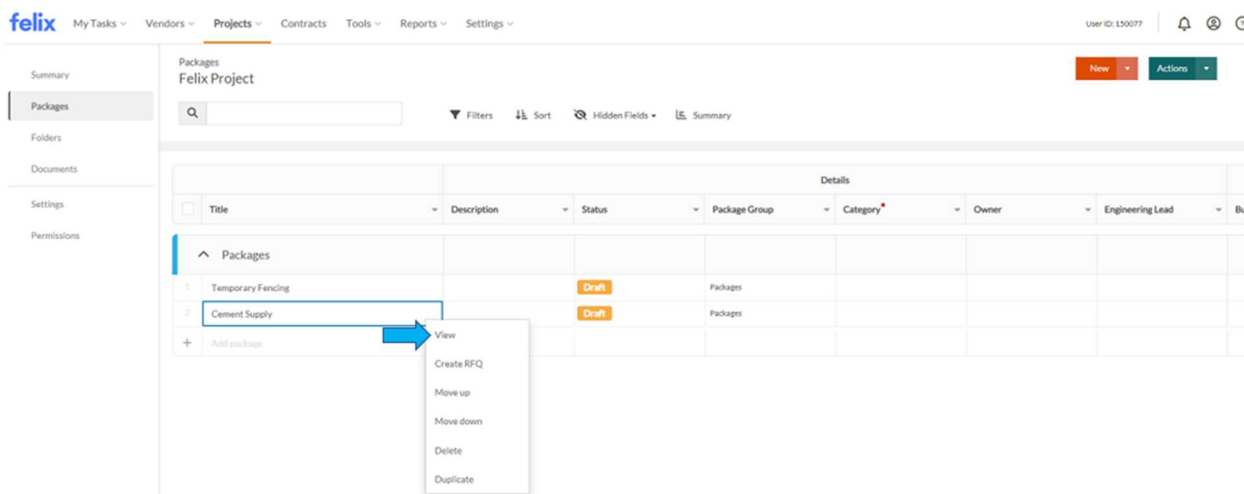
4. On the right side, under **Activity** section, enter your comment in the text box provided.
5. Click **Add**.

- Below, you can see the history of the activities that had been made in the package.

Editing a comment

To edit a comment:
1. In the activity history, hover over the comment that you would like to edit.
2. Click the **edit icon** in the top right of the comment.
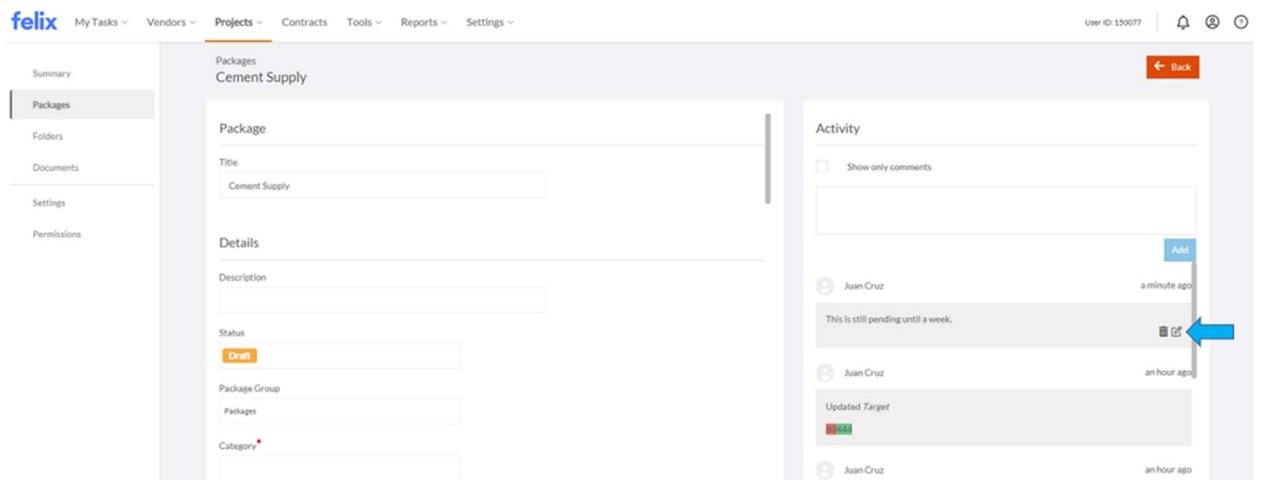
3. Make the necessary changes.
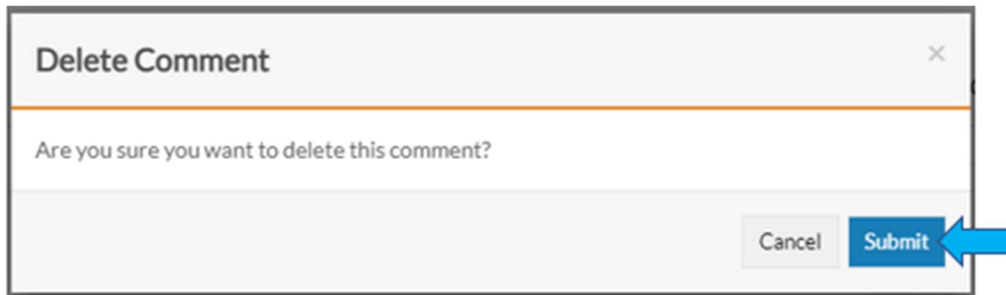
4. Click **Save**.

Deleting a comment

To delete a comment:
1. In the activity history, hover over the comment that you would like to delete.
2. Click the **trash bin icon** in the top right of the comment.

3. Click **Submit** to confirm the deletion.

Viewing comments

To view comments only:

1. Click the **Show only comments** checkbox.
   - The activity history will only show the comments made in the package.