



RTX

RTXOSC
Operations & Supply Chain

Exostar's RTX Sourcing Supplier RFQ Training

08/01/2023

RTX is subject to a complex set of U.S. and non-U.S. trade laws and regulations. Our policy is to comply fully with these laws and regulations in all countries where we do business. As such no Export/Import (EXIM) controlled data may be uploaded to the Exostar hosted RTX applications.

US & Non-Us Persons

Export Controlled Data **Strictly Prohibited**

US & Non-US Persons



RTX Sourcing

- Exostar and RTX have collaborated to release a new application that will replace the retiring SourcePass application
- RTX Sourcing provides an efficient, easy to use application that allows Suppliers to respond to requests for quotes via Quick Quotes and Auctions
- Access to RTX Sourcing
 - Any user who currently has access to SourcePass will have access to RTX Sourcing
 - Your company's Exostar administrator can assign access to those who do not have access

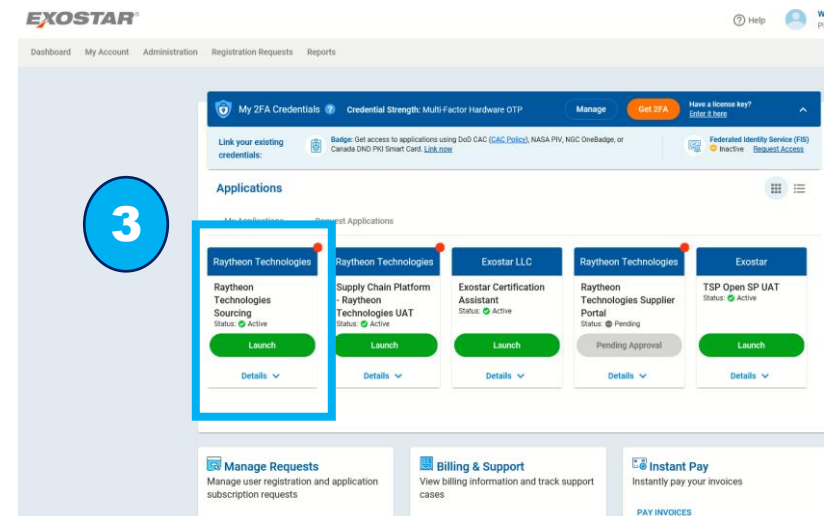
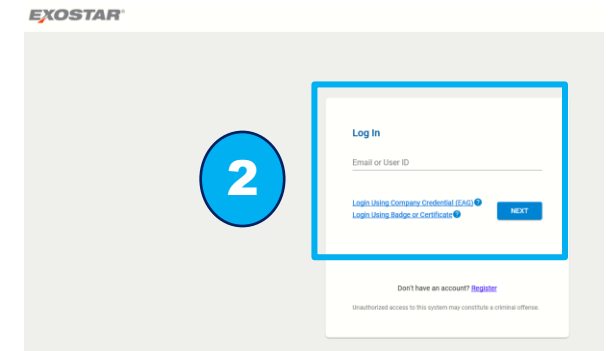
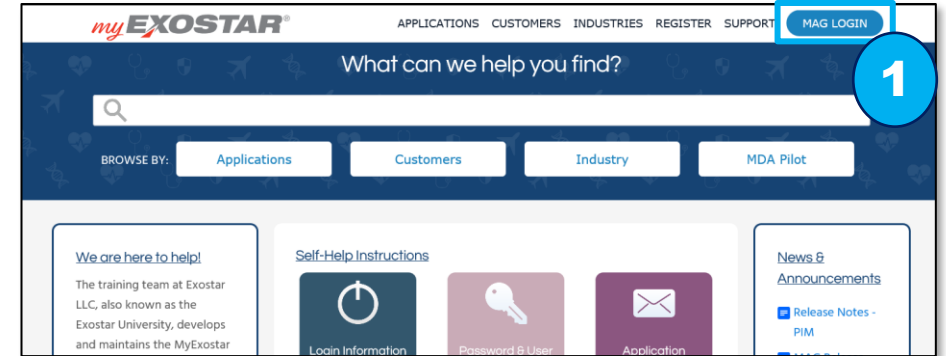
General Information

- The RTX Sourcing application provides the ability to respond to a variety of Requests for Quotes (RFQs) or to bid on Government or RTX auctions
- Response pages will vary slightly because RTX sends information from three different source systems
- Be sure to complete all required fields as flagged by red asterisks (*)
- Be sure to save often to prevent having to re-enter information if the application times out due to non-use



Logging in

1. Go to my.exostar.com and click **MAG Login** to launch Exostar's Managed Access Gateway (MAG)
2. Enter your **User ID** and **password** to **Login**
3. Find RTX Sourcing on your list of applications and click on the **Launch** action button
 - Note: 2-Factor Authentication (2FA) security credentials are not required for RTX Sourcing

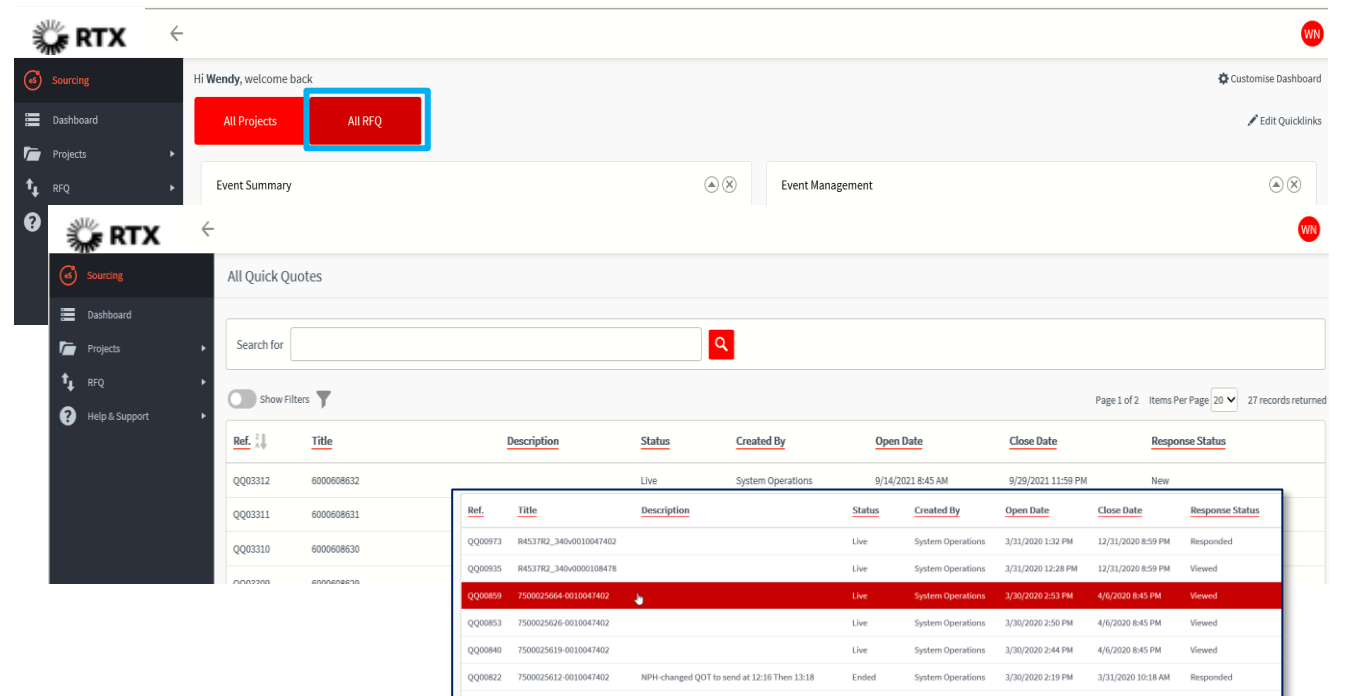
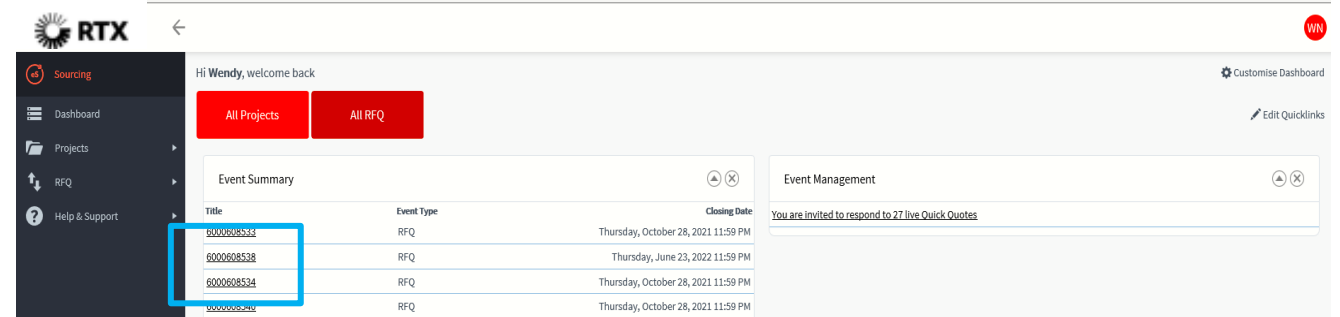


Locating your RFQ

- For **Quick Quote RFQs**, open the quote from the home screen by clicking on the hyperlink for that RFQ number

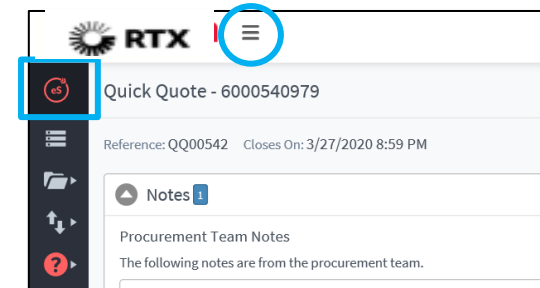
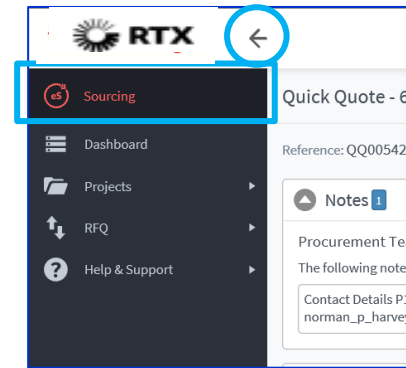
OR

- Click the **All RFQ** button to see a list of all RFQs you have been invited to and the status of the RFQs
- Then click the RFQ you want to address

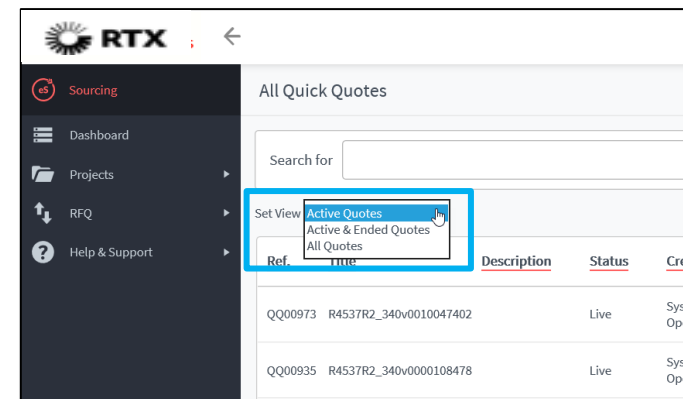


Changing your View

- Click the **arrow** to compress the menu, then click the **Toggle Menu Expansion** to go back to the full menu on the left
 - This allows more information to be displayed



- You can change your view of the data from the **All Quotes** screen by filtering / selecting to review:
 - Active Quotes
 - Active & Ended Quotes, or
 - All Quotes



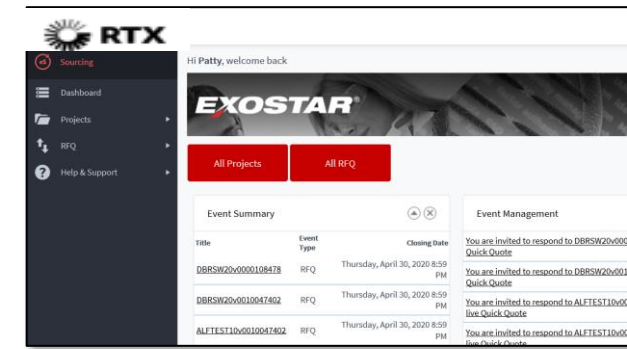
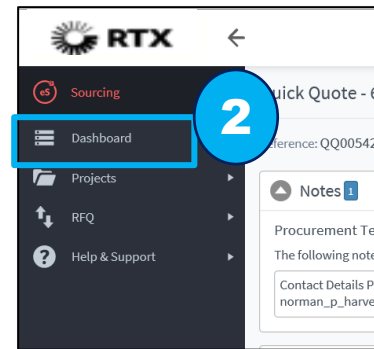
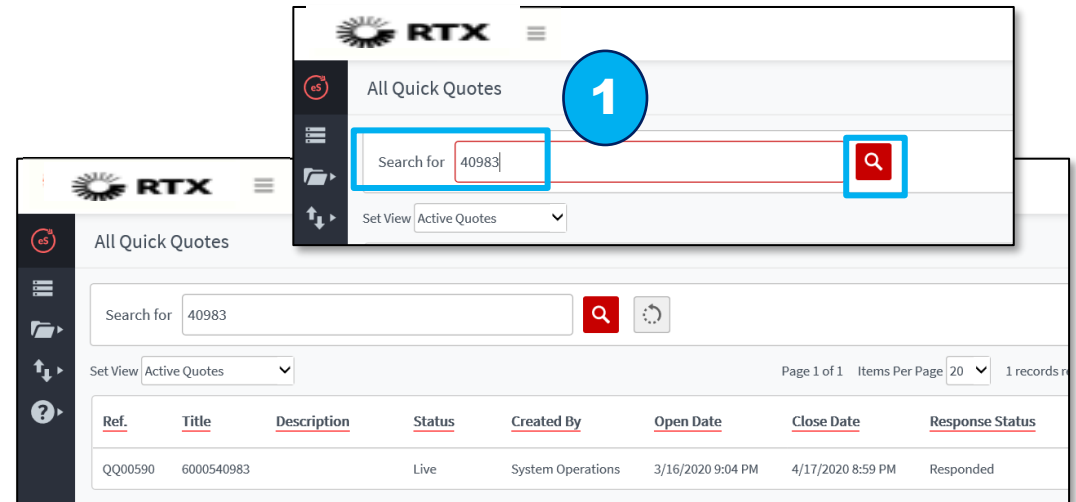
RFQ Statuses

1. The **Status** column indicates whether a quote is active (**Live**) or closed (**Ended**)
2. The **Response Status** column provides information on whether an RFQ is **New**, has been **Viewed** or if a response has been sent (**Responded**)

Ref.	Title	Description	Status	Created By	Open Date	Close Date	Response Status
QQ01019	6000541007		Live	System Operations	4/7/2020 4:23 AM	4/17/2020 8:59 PM	Viewed
QQ00808	6000541002		Ended	System Operations	3/27/2020 12:33 PM	4/3/2020 8:59 PM	Viewed
QQ00807	6000541003		Ended	System Operations	3/27/2020 12:32 PM	4/3/2020 8:59 PM	Viewed
QQ00590	6000540983		1	System Operations	3/16/2020 9:04 PM	4/17/2020 8:59 PM	2
QQ00544	6000540981		1	System Operations	3/16/2020 5:31 AM	3/27/2020 8:59 PM	2
QQ00543	6000540980		Ended	System Operations	3/16/2020 5:29 AM	3/27/2020 8:59 PM	Responded
QQ00542	6000540979		Ended	System Operations	3/16/2020 5:28 AM	3/27/2020 8:59 PM	Viewed
QQ00541	6000540978		Ended	System Operations	3/16/2020 5:28 AM	3/27/2020 8:59 PM	Responded
QQ00463	6000540973		Ended	System Operations	3/12/2020 6:48 AM	3/27/2020 8:59 PM	Viewed
QQ00462	6000540972		Ended	System Operations	3/12/2020 6:40 AM	3/27/2020 8:59 PM	New
QQ00461	6000540971		Ended	System Operations	3/12/2020 6:38 AM	3/27/2020 8:59 PM	New
QQ00460	6000540970		Ended	System Operations	3/12/2020 6:34 AM	3/27/2020 8:59 PM	Viewed
QQ00455	6000540965		Ended	System Operations	3/12/2020 6:23 AM	3/17/2020 8:59 PM	New
QQ00454	6000540964		Ended	System Operations	3/12/2020 6:22 AM	3/27/2020 8:59 PM	New

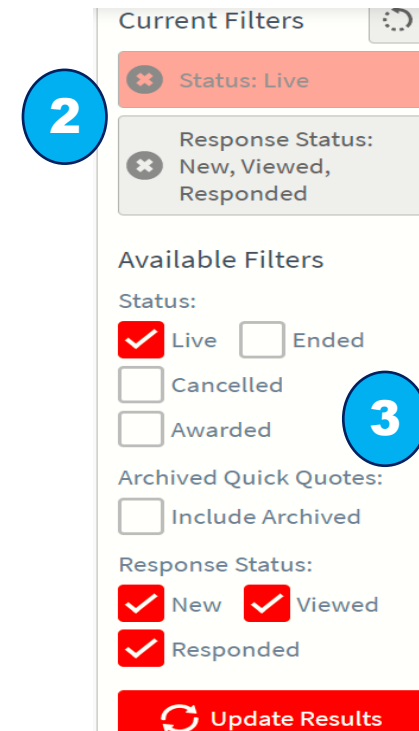
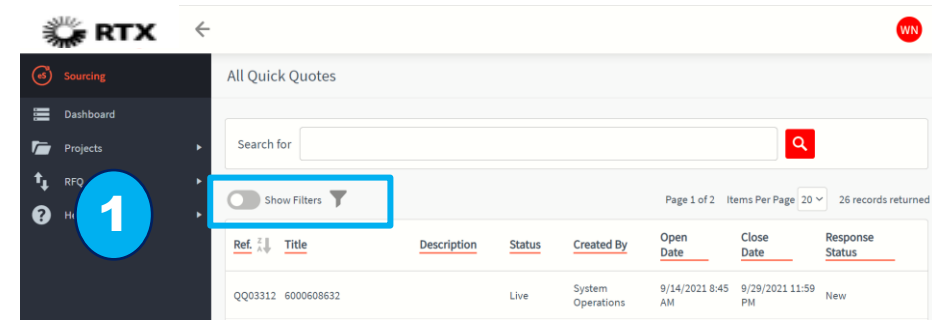
Search and Navigation

1. After clicking the **All RFQ** button, the **All Quick Quotes** view displays, and a search box is available
 - You can enter all or part of the RFQ number, then click the magnifying glass to search
2. If you have navigated to another area of the application, click **Dashboard** to go back to the full list of RFQs
3. If your search returned multiple pages, click on the page number at the bottom of the page to navigate further



Search and Navigation

1. You can narrow your search using the provided filters
 - Use the Show Filters toggle to open the filter box
2. The default filter is for all live RFQs with a status of New, Viewed or Responded. The Current Filters are always shown at the top of the Filter Box.
3. You can expand your search to capture RFQs that are ended, cancelled, awarded and even archived in your search



Understanding a Quick Quote RFQ

- The various components of an RFQ include the following; those areas requiring action are discussed in further detail on following slides:

1. RTX RFQ Number
2. Exostar RFQ Reference number
3. RFQ Closes On Date
4. RFQ Header Notes
5. Attachments
6. Line Items
7. Save
8. Submit Bids

The screenshot displays the RTX Quick Quote interface. At the top, the RTX logo and navigation menu are visible. The main header shows the RFQ title "Quick Quote - 6000541009" (callout 1) and the reference number "Reference: QQ01022" (callout 2). The closing date "Closes On: 4/17/2020 8:59 PM" (callout 3) is also present. Below the header, there are sections for "Notes" (callout 4) and "Attachments" (callout 5). The main body of the page shows a list of line items (callout 6) with a blue callout box stating: "This section includes functions / ability to respond to the bid on each line that is sent by the RTX Buyer". At the bottom, there are "Save" (callout 7) and "Submit Bids" (callout 8) buttons. The interface also includes options for "Import/Export Bids" and "Decline To Bid", and a "Bidding Currency: US dollar (USD)" indicator.

Header Notes / Buyer information

1. Click the carrot / arrow by the **Notes** section in the RFQ header to see **Buyer contact information**

- RTX Sourcing allows Suppliers to add notes in multiple areas; notes added here will be at the header, not line level

2. Click the **Attachments** section to access a text file with header level RFQ notes (including terms and conditions)

- Though the application has the ability for Suppliers to attach files, any attached files will **NOT** be sent to RTX



The screenshot displays the RTX Quick Quote interface for reference QQ00590, closing on 4/17/2020 at 8:59 PM. The interface includes sections for Notes and Attachments. The Notes section is expanded to show 'Procurement Team Notes' with the following text: 'The following notes are from the procurement team. Contact Details P140-PRSM Jane Smith JaneSmith@RTX.com 978-635-1234'. The Attachments section is expanded to show 'Procurement Team Attachments' with the following text: 'The following attachments are from the procurement team. RFQ6000540983_HeaderNotes.txt'. Red callout boxes with numbers 1 and 2 highlight the toggle arrows for the Notes and Attachments sections respectively.

Both arrows are toggle functions and can be clicked again to open or collapse a section



Line Item Notes / Attachments

1. Clicking on the **paperclip** opens the Line Attachments window
 - This contains line item text attachment
 - Ignore attachment upload (browse button); this capability is not functioning at this time
2. Clicking on the **notepad** will let you review line item notes
 - The number next to the notepad reflects how many line item notes are provided
 - Use the **Note Text** box to send line item notes to your Buyer
 - Type text, then click **Add**, your note will be visible
 - Then another Note Text box will be visible
 - Continue to add more notes, as needed, clicking **Add** each time

1

RTX

Item00010: 7SP-353 Eng Part #: 7SP-353
Description: Item00010: 7SP-353 Eng Part #: 7SP-353;LMT, SHELTER, OPERATIONS

Qty: 111.00 Unit Of Measure: EA Line Id: 00010 Category: Raytheon Company

Maximum Desired Quantity: Minimum Bid Quantity: 1.00 Maximum Bid Quantity:

Delivery Date: 5/20/2020 Item Level Comment: Test equipment Bid Status: --Please Select-- Supplier Quote Number:

Payment Terms: --Please Select-- INCOTERMS: --Please Select-- Destination City: Minimum Buy:

Supplier Lead Time in Weeks: Item Pricing Condition: --Please Select-- Price Condition Amount: Supplier Contact Name:

Supplier Contact Phone: Enter Date Quote is valid from: 4/15/2020 Enter Date Quote is valid until: 5/5/2020 One Time Charge:

Min Qty: Max Qty: Price: 52

Add Price Break Quote (Min Qty and Max Qty required)

Line Attachments

The following attachments are from the procurement team.

RFQ600054100900010_ItemNotes.txt

You can add attachments which will be visible to the procurement team below.

Drag Files Here
Or Click "Browse" To Add

Browse

Line Notes

The following notes are from the procurement team.

Buyer Min Qty-00010: 111.000 This is the Min Qty for Allocation.

Delivery Schedule Detail 1: 111.000 EA 20200902

Quality Note 1: B6-3 GT-5 AN... D4-6 DX-11 UK-7

Quality Note 2: MZ-7 WE-4... A-2 SL-2

Incoterms: FOB Origin

PaymentTerms: Net30. See Section 14 Payment Terms Below

QuoteValidityDate: 20200226

SourcePass.DeliveryDate: 20200902T23:59:00

You can add notes which will be visible to the procurement team below.

Note Text:

Add

1

2

Responding to a Quick Quote RFQ

1. To view line details and enter your bid, open a Quick Quote RFQ at the Item Level by **clicking the arrow** next to the line number
2. Enter information for all required fields with a **Red Asterisk *** for each individual line item
3. Click **Save** frequently
4. Click **Submit Bids** when ready to submit your bid

The screenshot displays the RTX Quick Quote RFQ interface. At the top, the header shows 'Quick Quote - 600541011' and 'Reference: QQ01024 Closes On: 4/27/2020 8:59 PM'. Below this, there are sections for 'Notes' and 'Attachments', each with an 'Add' button. The main content area shows a list of items. Item 1 is highlighted with a red box and a blue circle '1' next to its expand arrow. Item 2 is also visible below it. At the bottom of the interface, there are 'Save' and 'Submit Bids' buttons, with a blue circle '3' next to 'Save' and a blue circle '4' next to 'Submit Bids'. A detailed view of Item 1 is shown in the foreground, with a blue circle '2' next to the 'Item Level Comment' field. A blue callout box on the right side of the detailed view contains the text: 'Your bid is not sent to the Buyer until all lines have been submitted and/or declined to bid'.

Multi Bid Response

1. If you wish to add price breaks for different quantities on a bid, click the **Add Price Break Quote** option
2. Enter the data for your price break quote
 - NOTE: If you wish to add further delineation of pricing breaks based on quantities, go back to step 1 to continue adding price break detail
3. Click **Save** frequently
4. Click **Submit** when you are ready to submit your bid

The screenshot shows the RTX bidding system interface. The top header includes the RTX logo, a reference number (QQ01024), and a closing date (4/27/2020 8:59 PM). The main content area displays item details for 'Item00010: 7SP-353 Eng Part #: 7SP-353' and 'Item00020: 2410004-0027 Eng Part #: 2410004-27'. The bottom section shows the 'Add Price Break Quote' process with two price break quote forms (2a and 2b) and a 'Save' button. A blue callout box highlights the 'Add Price Break Quote' button, and numbered circles (1-4) indicate the steps described in the text.

1. Add Price Break Quote (Min Qty and Max Qty required)

2a. Price Break Quote 1

2b. Price Break Quote 2

3. Save

4. Submit Bids

Continue to click the **Add Price Break Quote** option for the number of Multi Bid Responses you want to submit

Decline to bid one line / Reactivate to bid

- To decline one line at a time:
 - When you hover over the **X** next to a line, you will see the message **Decline to provide a quote for this line**
 - Click the **X** if you want to decline that line
 - Click **Yes** to proceed, **No** to cancel the action
 - Results show the line is no longer able to bid
 - You can reactivate the bid by clicking the **Red X**
 - You will receive a confirmation that indicates you previously declined, and asks you to confirm you now wish to submit a bid. Click **Yes** to continue.

Decline one line on a bid request

After declining, that line on a bid is unable to bid against, unless reactivated

Decline to bid multiple lines at once

- To decline to bid against multiple lines at once:
 1. Click the **Decline to Bid** action in the upper right corner
 2. A window appears with options to decline the entire bid or specific lines
 3. Click the option **I do not wish to provide a quote for specific lines**
 - a. A list of all lines appears
 - b. You have the option to select one or more lines – they act as a toggle, you can click a line to decline, or click again to toggle back
 - c. Then click **Save**

NOTE: Throughout this process, you will have opportunities to cancel your request and continue to bid

2

3a

3b

3c

Toggle (to the left) off or on to indicate which lines you do not want to bid against

Quick Quote - 6000541007
Reference: QQ01019 Closes On: 4/17/2020 8:59 PM
Notes
Attachments
Bidding Currency: US dollar (USD)
Item00010: NAS1352NG

Decline To Bid
Please select whether you would like to decline specific lines or the quote as a whole
 I do not wish to provide a quote for specific lines
 I do not wish to participate in the quote request
Cancel

Item00930: 01STE-D0001	93.00	EA
Item00940: D3101FM	94.00	EA
Item00950: D3101FM	95.00	EA
Item00960: D3101M	96.00	EA
Item00970: D3101M	97.00	ZIO
Item00980: A997653	98.00	ZIO
Item00990: A997653	99.00	ZIO
Item01000: 4993356-1 Eng Part #4993356-1	100.00	ZIO

Save Cancel

Decline to bid entire RFQ

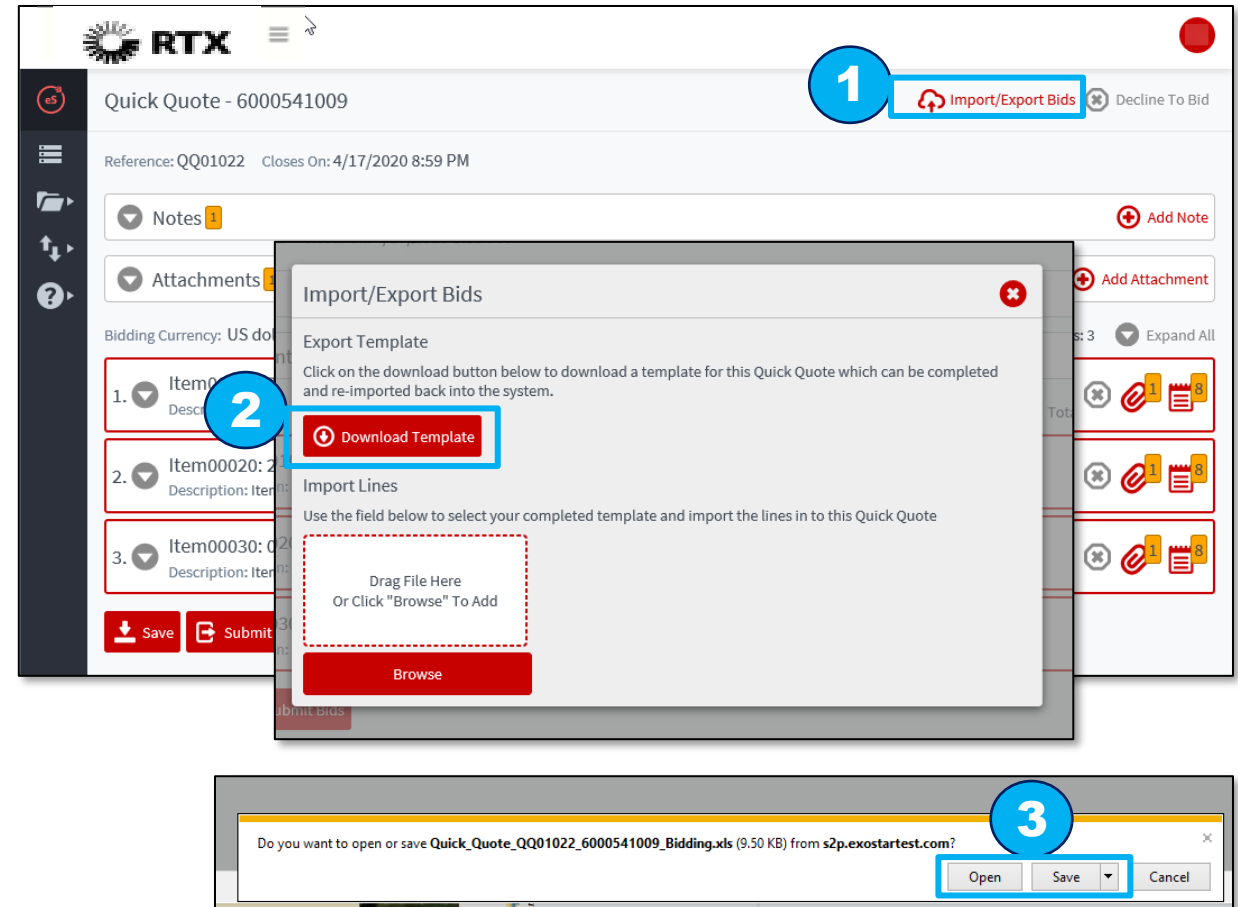
- To decline to bid against the entire RFQ:
 - Click the **Decline to Bid** action in the upper right corner
 - A window appears with options to decline the entire bid or specific lines
 - If you choose to decline the entire bid, click **I do not wish to participate in the quote request**
 - Include a message explaining the **reason** why
 - Then click **Confirm**
 - You will receive a confirmation message that you declined to bid

Throughout this process, you will have opportunities to cancel your request and continue to bid

CRITICAL NOTE: If you no-bid at the header level the RFQ is eliminated; only submit a decline to bid at the header level if never want to bid the RFQ

High Volume RFQ Export / Import (Download)

- RTX Sourcing provides the option to download the bid information, enter your bid into a spreadsheet and upload your responses
 1. Click the **Import/Export Bids** option
 2. Next, click **Download Template**
 3. Click **Open** to open the file (and save later), or **Save** to immediately save the file to your computer



High Volume RFQ Export / Import (Spreadsheet)

- Green areas of the spreadsheet designate where you can enter bid information
- Mandatory fields are not highlighted in the spreadsheet, but are required before the bid is finalized / submitted
 - Depending on the source system that sent the request to you, mandatory items will differ

1. Enter your bid information in the green fields on the spreadsheet
2. Click **Save** frequently, so you do not lose data in the spreadsheet
3. You can also submit a No Bid response to a line in the spreadsheet, by entering **Y** in the **Decline** field (column B)

Decline	Line Number	Item Name	Qty	Description	Unit Of Measure	Min Qty	Max Qty	Price	Delivery Date
N	1	Item 00010		Item00010: TSP-353	EA				
N	2	Item 00024		Item00024: TSP-353	EA				
N	3	Item 01190	311	Item01190: TSP-353	EA				

High Volume RFQ Export / Import (Upload)

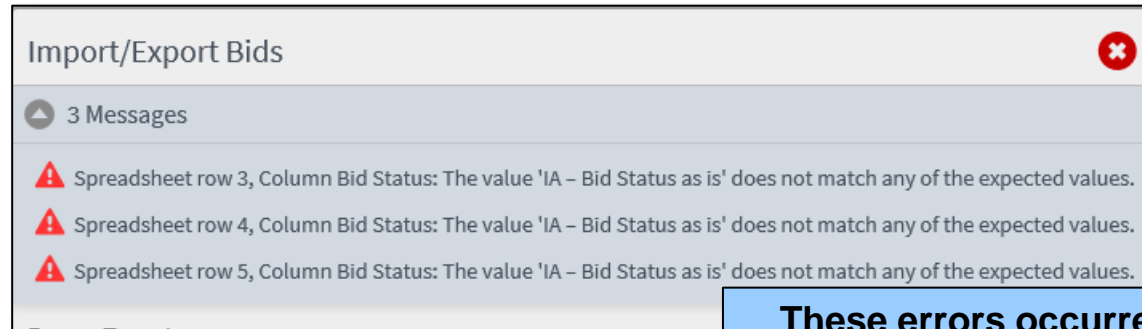
- Now that you have downloaded the template, entered the data in the spreadsheet, and saved the file, you are ready to upload your bid(s)
 1. Go back to RTX Sourcing (if the window is not open, find the RFQ and click the **Import/Export Bids** option), find the file by clicking **Browse**
 - a. You will see a message with a status bar as the file uploads
 2. Once the upload completes, a completion message lets you know the import was successful
 3. After you click the **OK** button (on the completion message), you will see quote data that you entered in the spreadsheet; verify all mandatory fields are complete
 4. Click **Save**
 5. If all mandatory fields are complete, click **Submit Bids**

The image displays a sequence of five screenshots from the RTX Sourcing interface, illustrating the process of importing bids. The screenshots are annotated with numbered callouts (1, 1a, 2, 3, 4, 5) corresponding to the steps in the text.

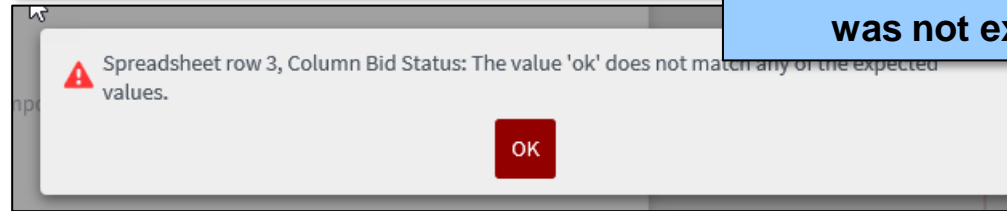
- 1:** The 'Import/Export Bids' window is shown with the 'Browse' button highlighted.
- 1a:** A progress bar is shown at the bottom of the 'Import/Export Bids' window, indicating the file upload status.
- 2:** A success message is displayed: 'Your file was successfully imported and processed', with an 'OK' button.
- 3:** The main quote form is shown, displaying various fields such as 'Qty', 'Delivery Date', 'Bid Status', and 'Supplier Quote Number'.
- 4:** The 'Save' and 'Submit Bids' buttons are highlighted at the bottom of the form.
- 5:** The 'Submit Bids' button is highlighted.

High Volume RFQ Export / Import (Sample Errors)

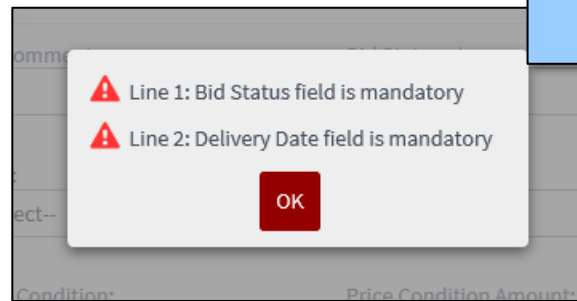
- If information is not entered correctly in mandatory fields, you will receive error messages



These errors occurred as the text was not exactly as required



These errors occurred after clicking **Submit Bids**, as mandatory fields were not entered on the spreadsheet or on the screen



The errors are highlighted so they can easily be updated in the application (or you can fix in the spreadsheet and import again)

Bid Status: *

--Please Select--

Delivery Date: *

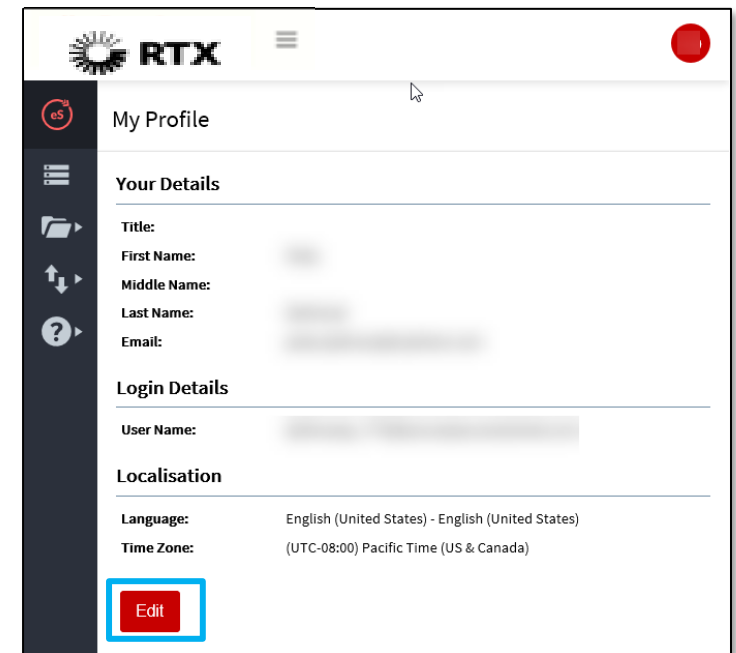
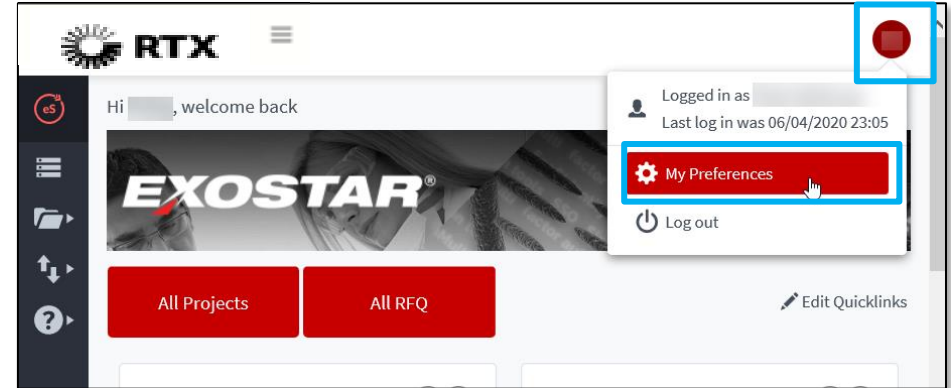
m/d/yyyy

Revising a bid once submitted

- Until the **closes on date**, Bids can be edited, saved and resubmitted

My Preferences

- In the upper right corner of the screen, click on the **red circle** with your initials, then select **My Preferences**
- On this page, you can click the **edit** button to edit your name, email address, language and / or time zone

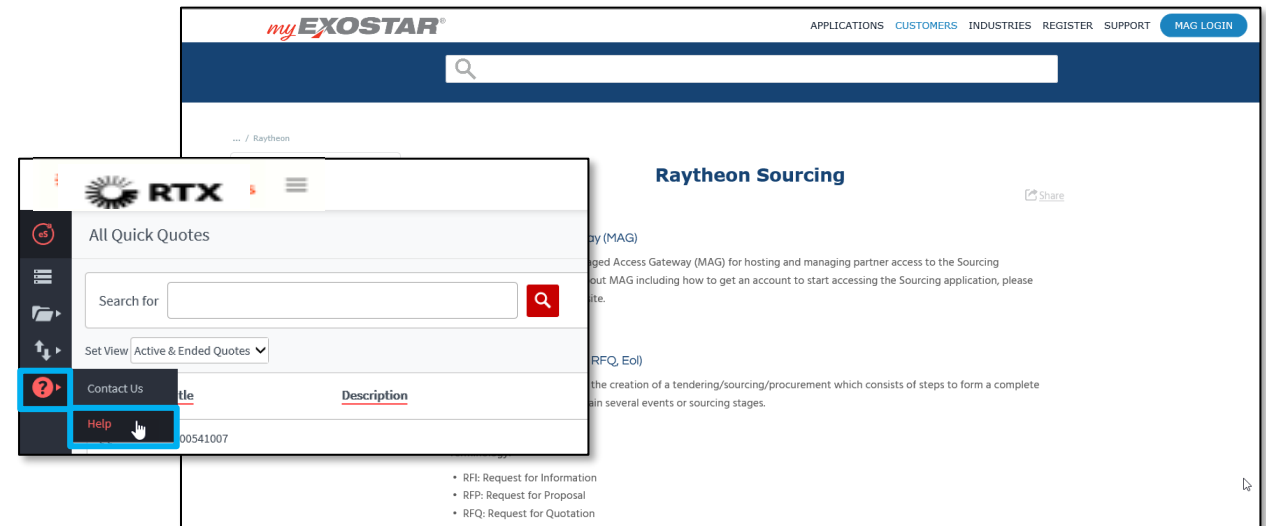
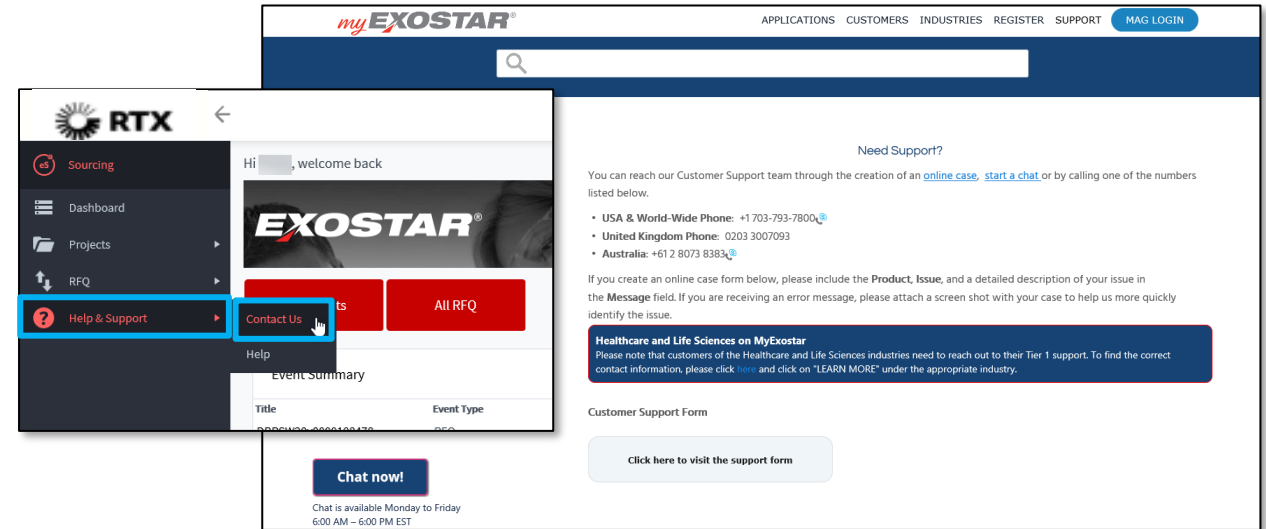


Projects

- The **Projects** function relates to Auctions
- See training at <https://my.exostar.com/display/TE/RTX+Downloadable+Guides>

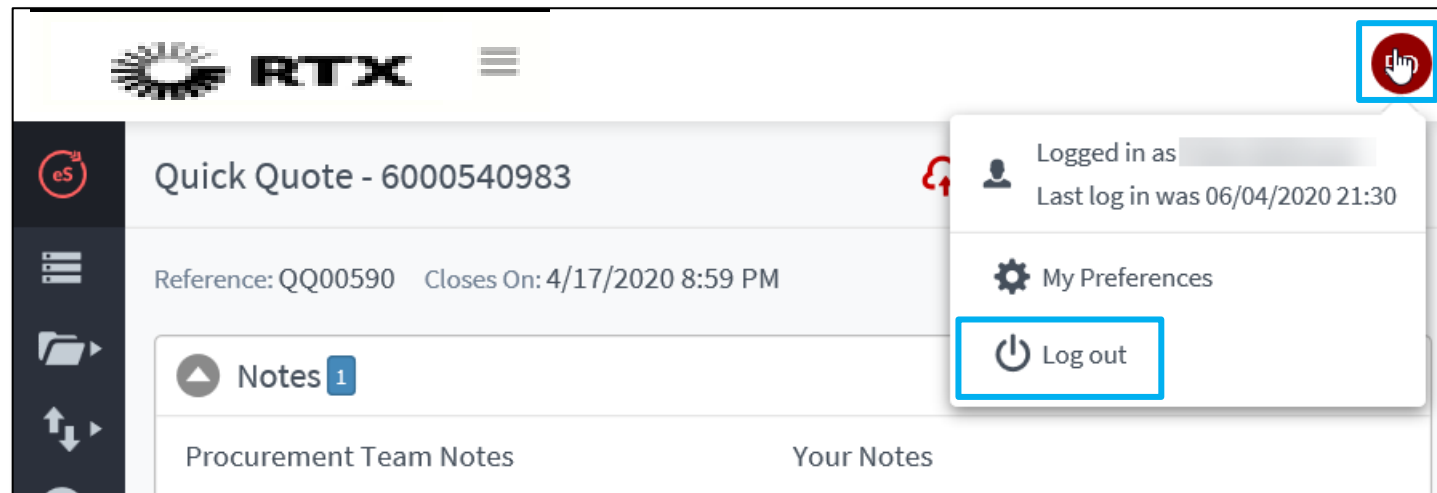
Getting Help

- Regardless of what screen you are viewing, **Help & Support** is available
 - Click **Contact Us** and you will be taken to an Exostar website that gives options to:
 - Chat with Exostar
 - Complete an on-line Support form
 - Or access phone numbers to call Exostar
 - Click **Help** and you will be directed to targeted training on my.Exostar.com for the RTX Sourcing application



Log Out

- In the upper right corner of the screen, click on the **red circle** with your initials
- Select the **Log out** option to close out **RTX Sourcing**



Points to Remember

- As long as a bid remains open, you can make as many changes as you'd like – Save and resubmit
- The **Import / Export** or **price break** features can save time
- Always **Save**, then click **Submit Bids** to finalize and send your quote
- Bids that have been completely **declined** are not available to be viewed or in the search, and no longer able to have a response sent
- It is critical to submit your RFQs electronically so that your bid will populate into the Buyer's quote queue
- Save frequently
- Reminder: Drawings are sent via **RTX Secure Messenger Gateway (RSMG)**, not attached in Exostar's **RTX Sourcing** application



Resources

- Go to my.Exostar.com and click **Support** for more information on how to:
 - Submit an on-line support case,
 - Chat with Exostar
 - Call Exostar Customer Service at 703.793.7800

The top screenshot shows the my.Exostar.com homepage. The 'SUPPORT' link in the navigation menu is highlighted with a red box, and a red arrow points to it from the top right. Below the navigation is a search bar and a 'BROWSE BY' section with buttons for Applications, Customers, Industry, and MDA Pilot.

The bottom screenshot shows the 'Support' page. The 'SUPPORT' link in the navigation menu is highlighted with a red box. The page content includes a 'Top Issues' list on the left, a 'Need Support?' section with contact information, and a 'Customer Support Form' section. The contact information is highlighted with a red box:

- USA & World-Wide Phone: +1 703-793-7800
- United Kingdom Phone: 0203 3007093
- Australia: +61 2 8073 8383

Below the contact information, there is a 'Healthcare and Life Sciences on MyExostar' section and a 'Customer Support Form' section. The 'Chat now!' button is highlighted with a red box, and the 'Click here to visit the support form' button is also highlighted with a red box.



RTX is subject to a complex set of U.S. and non-U.S. trade laws and regulations. Our policy is to comply fully with these laws and regulations in all countries where we do business. As such no Export/Import (EXIM) controlled data may be uploaded to the Exostar hosted RTX applications.

US & Non-Us Persons

Export Controlled Data **Strictly Prohibited**

US & Non-US Persons



Thank you.
