



# Using the RFI Tool for the IDC MarketScape

Manual for users of the platform

January 2023



## How can we help you?

### RFI Tool User Roles

- [Main Contact](#) | How to [access](#), [share](#), and [submit the RFI](#)
- [Topic Expert](#) | How to [access](#), [share](#), and [submit answers](#)
- [Collaborator](#) | How to [access](#) and [submit answers](#)

### Navigating the RFI Tool

- [Dashboard](#)
- [RFI Details](#)
- [Question Tabs](#)

### Key Action Functions

- [Submit RFI back to IDC](#)
- [Download a copy of the RFI](#)

# Download a copy of the RFI

1. Click on Actions to open the menu
2. "Export to PDF" to download a copy in PDF format
3. "Export to Excel" to download a copy in spreadsheet format



After clicking the export option, the browser would initiate the download sequence and the file would be saved to the default location for downloaded files.

Both file types generate editable versions of the RFI.

Exporting a copy will include any draft or confirmed answers entered in the RFI.

These files could be transmitted via other file-sharing channels for easier collaboration.

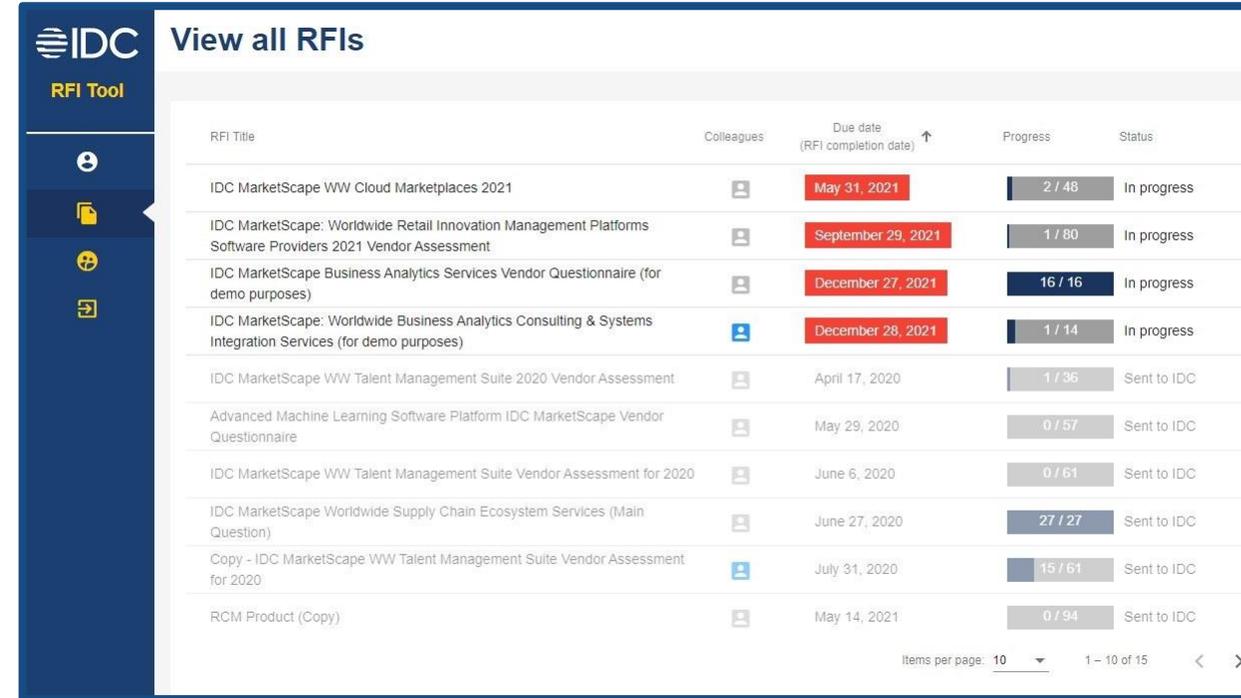
## RFI Tool User Roles: Main Contact

This user serves as the primary contact for the project; submits the final version back to IDC; can delegate/ assign others; log-in required

[How to access, share, and submit the RFI](#) | [How to navigate the RFI Tool](#)

# RFI Tool User Roles: Main Contact: How to access?

1. Send a request to [marketscape@idc.com](mailto:marketscape@idc.com) for Main Contact access for a specific RFI
2. Read the RFI Tool invite sent via [marketscape-noreply@idc.com](mailto:marketscape-noreply@idc.com)
3. Go to <https://apps.idc.com/idc-marketscape-rfi/pages/rfi-list>
  - a. Use IDC.com credentials and log in
  - b. Email must be registered on IDC.com or [create user ID](#)



The screenshot displays the 'View all RFIs' page in the IDC RFI Tool. The interface includes a dark blue sidebar with the IDC logo and 'RFI Tool' text, and a main content area with a table of RFIs. The table has columns for RFI Title, Colleagues, Due date (RFI completion date), Progress, and Status. The progress bars are color-coded: grey for 'Sent to IDC' and dark blue for 'In progress'. The status 'In progress' is also highlighted in red in the original image.

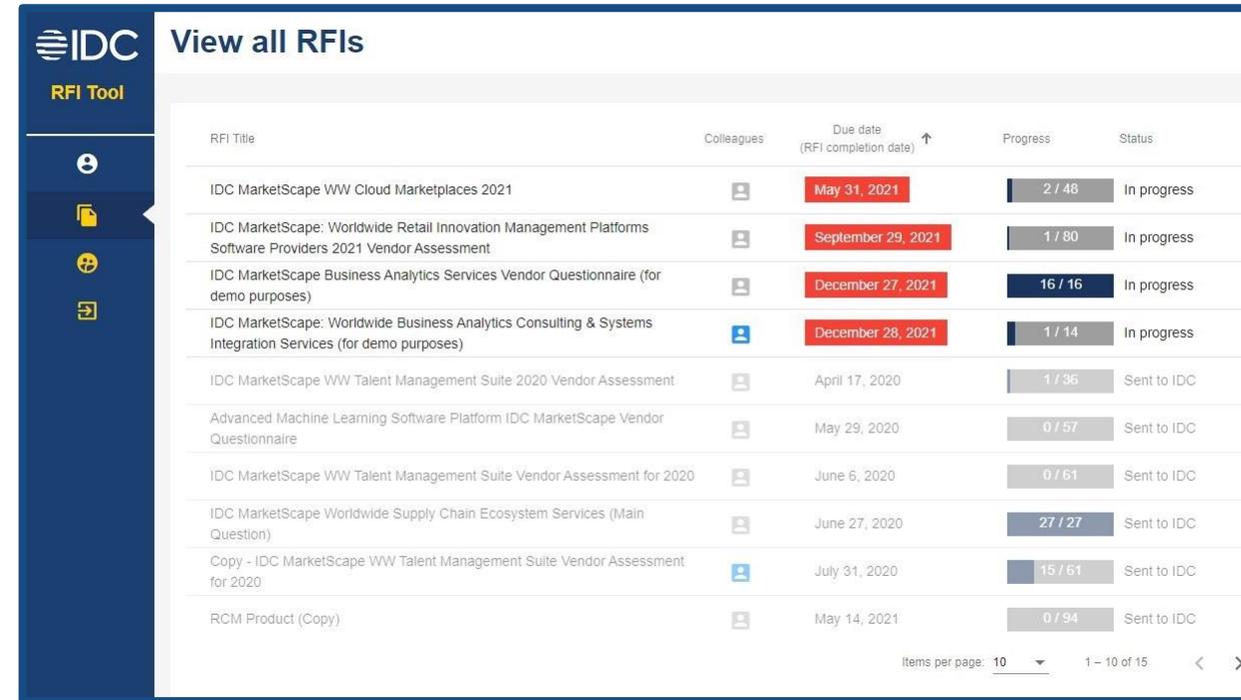
RFI Title	Colleagues	Due date (RFI completion date)	Progress	Status
IDC MarketScape WW Cloud Marketplaces 2021		May 31, 2021	2 / 48	In progress
IDC MarketScape: Worldwide Retail Innovation Management Platforms Software Providers 2021 Vendor Assessment		September 29, 2021	1 / 80	In progress
IDC MarketScape Business Analytics Services Vendor Questionnaire (for demo purposes)		December 27, 2021	16 / 16	In progress
IDC MarketScape: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)		December 28, 2021	1 / 14	In progress
IDC MarketScape WW Talent Management Suite 2020 Vendor Assessment		April 17, 2020	1 / 36	Sent to IDC
Advanced Machine Learning Software Platform IDC MarketScape Vendor Questionnaire		May 29, 2020	0 / 57	Sent to IDC
IDC MarketScape WW Talent Management Suite Vendor Assessment for 2020		June 6, 2020	0 / 61	Sent to IDC
IDC MarketScape Worldwide Supply Chain Ecosystem Services (Main Question)		June 27, 2020	27 / 27	Sent to IDC
Copy - IDC MarketScape WW Talent Management Suite Vendor Assessment for 2020		July 31, 2020	15 / 61	Sent to IDC
RCM Product (Copy)		May 14, 2021	0 / 94	Sent to IDC

Items per page: 10 | 1 - 10 of 15

# RFI Tool User Roles: Main Contact: How to access?

Logging in will take you directly to the RFI Tool dashboard which allows you...

- Access all RFIs that require your input
- View the due dates for each
- Assess the progress by your colleagues

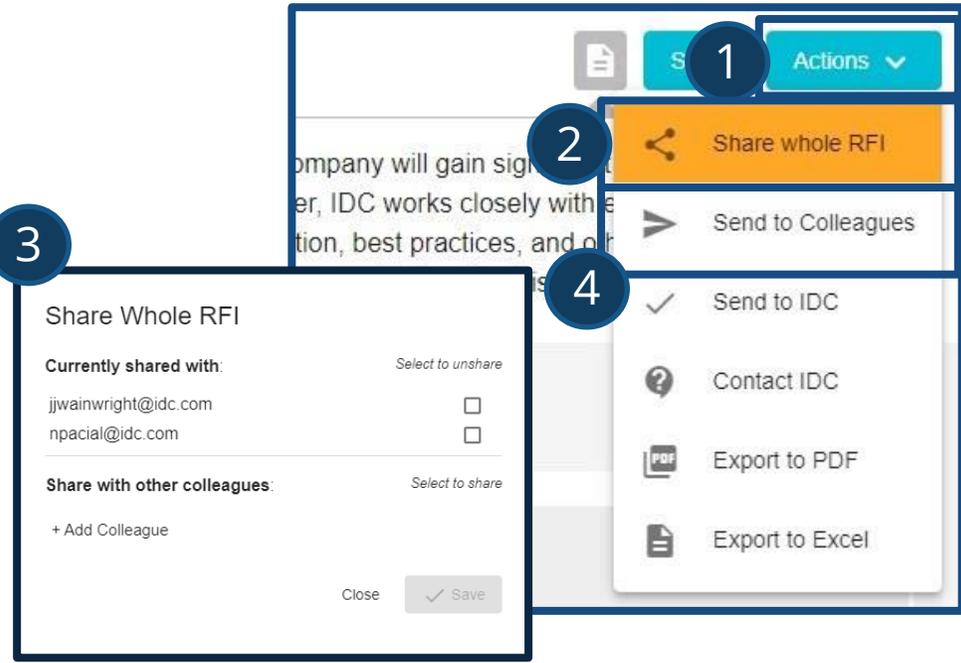


The screenshot displays the 'View all RFIs' dashboard. The table lists various RFIs with their respective due dates and progress bars. The 'Due date' column is sorted in ascending order. The 'Progress' column shows the number of completed items out of the total items for each RFI. The 'Status' column indicates the current state of each RFI.

RFI Title	Colleagues	Due date (RFI completion date) ↑	Progress	Status
IDC MarketScape WW Cloud Marketplaces 2021	[User Icon]	May 31, 2021	2 / 48	In progress
IDC MarketScape: Worldwide Retail Innovation Management Platforms Software Providers 2021 Vendor Assessment	[User Icon]	September 29, 2021	1 / 80	In progress
IDC MarketScape Business Analytics Services Vendor Questionnaire (for demo purposes)	[User Icon]	December 27, 2021	16 / 16	In progress
IDC MarketScape: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)	[User Icon]	December 28, 2021	1 / 14	In progress
IDC MarketScape WW Talent Management Suite 2020 Vendor Assessment	[User Icon]	April 17, 2020	1 / 36	Sent to IDC
Advanced Machine Learning Software Platform IDC MarketScape Vendor Questionnaire	[User Icon]	May 29, 2020	0 / 57	Sent to IDC
IDC MarketScape WW Talent Management Suite Vendor Assessment for 2020	[User Icon]	June 6, 2020	0 / 61	Sent to IDC
IDC MarketScape Worldwide Supply Chain Ecosystem Services (Main Question)	[User Icon]	June 27, 2020	27 / 27	Sent to IDC
Copy - IDC MarketScape WW Talent Management Suite Vendor Assessment for 2020	[User Icon]	July 31, 2020	15 / 61	Sent to IDC
RCM Product (Copy)	[User Icon]	May 14, 2021	0 / 94	Sent to IDC

Items per page: 10 | 1 - 10 of 15

# RFI Tool User Roles: Main Contact: How to share access to others?



## Assigning **Topic Experts**\*

1. Click on the "Actions" menu to reveal several options
2. Click on "Share whole RFI"
3. On the pop-up frame, type in your colleague's email address or choose from the list, click "Save"

4. Click on the "Send to Colleagues" button

\* This function can only be executed by the Main Contact

## Unshare access to **Topic Experts**

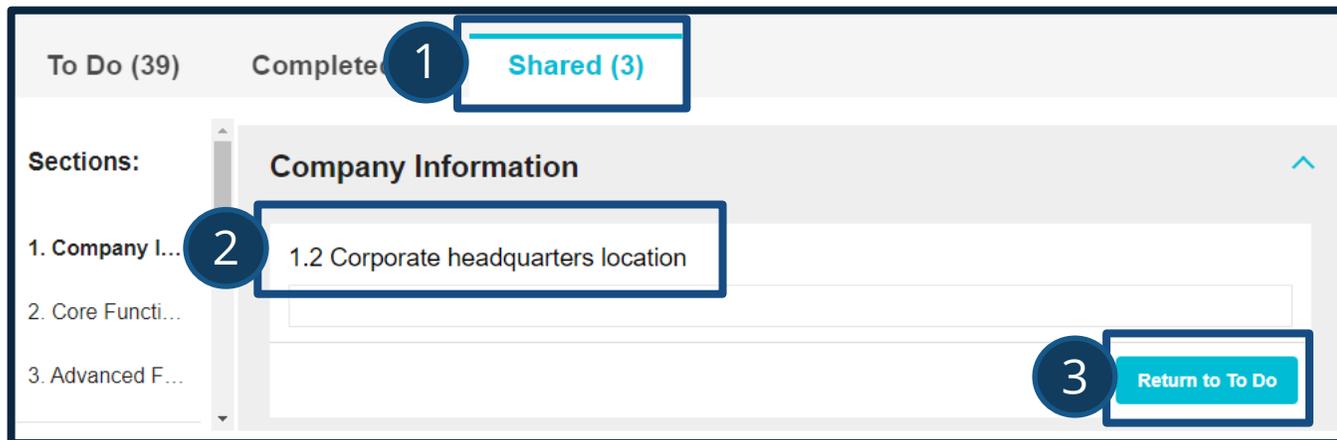
1. Click on the "Actions" menu
2. Click on the "Share whole RFI" button
3. On the pop-up frame, under the Unshare column, tick on the appropriate checkbox of the Topic Expert you want to cut off access to
4. Click on the "Save" button to close the pop-up frame

# RFI Tool User Roles: Main Contact: How to share access to others?

## Assigning **Collaborators**

Navigate to the share buttons at the bottom of each section

1. Click on the "Share" button to share the question
2. Click on the "Share section" button to share a section
3. Click "Send to Colleagues" at the bottom of the page



## Unshare access to **Collaborators**

1. Navigate to "Shared" questions tab
2. Look for the question you want to unshare
3. Click on the "Return to To-do" button

# RFI Tool User Roles: Main Contact: How to use RFI Tool Actions?

## Action Menu for **Main Contact**

- 1. Share whole RFI** – access to the whole RFI is shared with another person from Vendor's organization (Topic Expert); everything is available except Send to IDC button
- 2. Send to Colleagues** – sends out links with shared questions to Collaborators. Visible only when there are new items to share
- 3. Send to IDC** – when you are ready with the RFI, you send back the answers to IDC (before that answers are not visible to IDC Analyst); after this action, it's not possible to modify the RFI in the tool – links are disabled
- 4. Contact IDC** – email is sent to the owner of the RFI (IDC Analyst(s))
- 5. Export to PDF** – exports all questions (from all 3 tabs) with entered and Saved answers (Drafts are also exported)
- 6. Export to Excel** – exports all questions (from all 3 tabs) with entered and Saved answers (Drafts are also exported)



# RFI Tool User Roles: Main Contact: How to submit RFI back to IDC?\*

The screenshot displays the IDC MarketScape Business Analytics Services Vendor Questionnaire interface. The header shows 'IDC RFI Tool' and the title 'IDC MarketScape Business Analytics Services Vendor Questionnaire (for demo purposes)'. Below the title, it indicates '16 / 16' questions and a date of 'December 27, 2021'. The interface is divided into sections: 'To Do (0)', 'Completed (16)', and 'Shared (0)'. A section titled 'Required Questions for Business Analytics Services (General)' is visible, with a message stating 'There is no visible page or question in the RFI.' and '7 questions | 7 answered | 0 shared'. An 'Actions' dropdown menu is open, showing options: 'Share whole RFI', 'Send to IDC', 'Contact IDC', 'Export to PDF', and 'Export to Excel'. A confirmation dialog box is overlaid on the screen, asking 'Are you sure you want to finish?' and providing a warning: 'You are about to finish this RFI and send your answers back to IDC. After that, you won't be able to access it and modify your answers.' The dialog has 'No' and 'Yes' buttons.

1. Click on Actions to open the menu
2. Click "Send to IDC" option
3. On the pop-up frame, click "Yes" to finalize submission

Once submitted, all access to the RFI is cut-off for everyone

Dedicated links sent to all users would not work

The RFI would no longer be available for review, file export, or any other action.

\* This function can only be executed by the Main Contact

## RFI Tool User Roles: Topic Expert

This user has full access to the RFI and can delegate/assign to Collaborators; cannot submit the RFI to IDC; no log-in required

[How to access, share, and submit the RFI](#) | [How to navigate the RFI Tool](#)

# RFI Tool User Roles: Topic Expert: How to access?

1. Send a request to the Main Contact assigned for access for a specific RFI
2. Read the RFI Tool invite sent via [marketscape-noreply@idc.com](mailto:marketscape-noreply@idc.com)
3. Click on the link provided on the email; no log-in required

Logging in will take you directly to the RFI, click on the [Dashboard](#) icon to view list of RFIs assigned to you as a Topic Expert

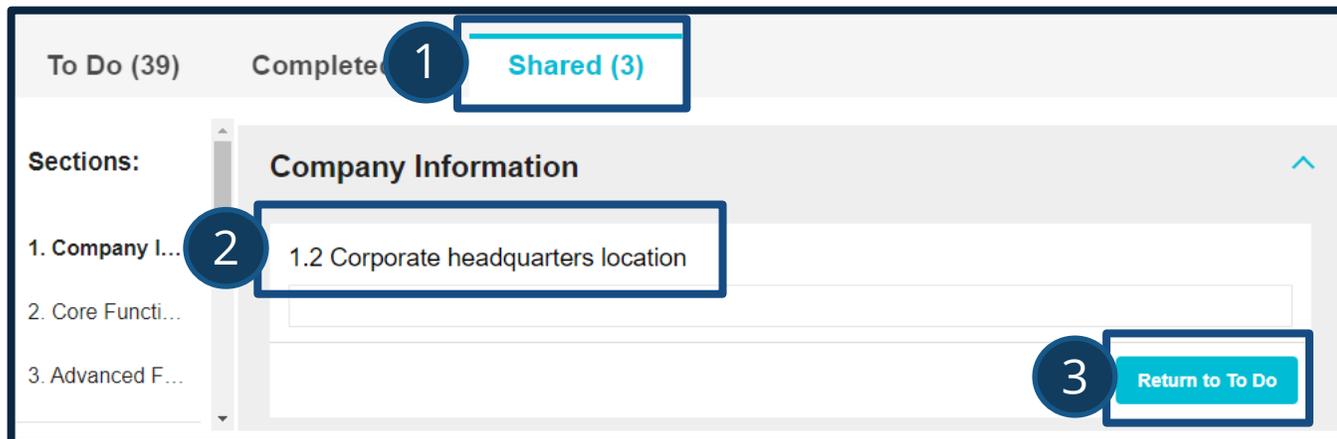
The screenshot displays the IDC MarketScape RFI Tool interface. The header includes the IDC logo and 'RFI Tool'. The main title is 'IDC MarketScape: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)'. A progress indicator shows '1 / 14' and the date 'December 28, 2021'. The 'RFI Description' explains the survey's purpose. Below the description, a section titled 'Business Analytics Consulting & Systems Integration Services' provides context. The interface features a navigation menu on the left with a 'Dashboard' icon highlighted by a yellow box and arrow. The main content area shows a list of sections: '1. Capabilities' and '2. Strategy'. The 'Capabilities' section is expanded to show a question: '1.3 What percent of your BA C&SI services delivery effort on average is automated (non-labor based)? Please use total services contract value as the denominator.' A text input field contains the value '100'. There are buttons for 'Historical', 'Share', and 'Answer'.

# RFI Tool User Roles: Topic Expert: How to share access to others?

## Assigning **Collaborators**

Navigate to the share buttons at the bottom of each section

1. Click on the "Share" button to share the question
2. Click on the "Share section" button to share a section
3. Click "Send to Colleagues" at the bottom of the page



## Unshare access to **Collaborators**

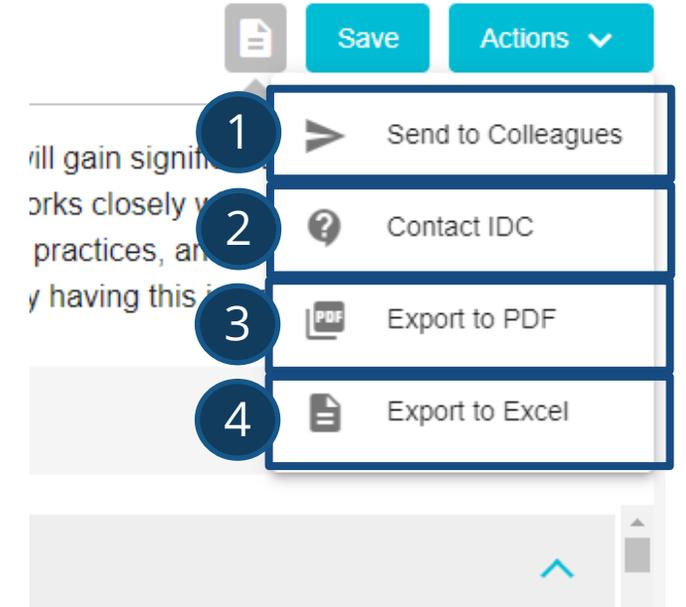
1. Navigate to "Shared" questions tab
2. Look for the question you want to unshare
3. Click on the "Return to To-do" button

# RFI Tool User Roles: Topic Expert: How to use RFI Tool Actions?

The Topic Expert can also access additional features through the Action Menu

## Action Menu for **Topic Expert**

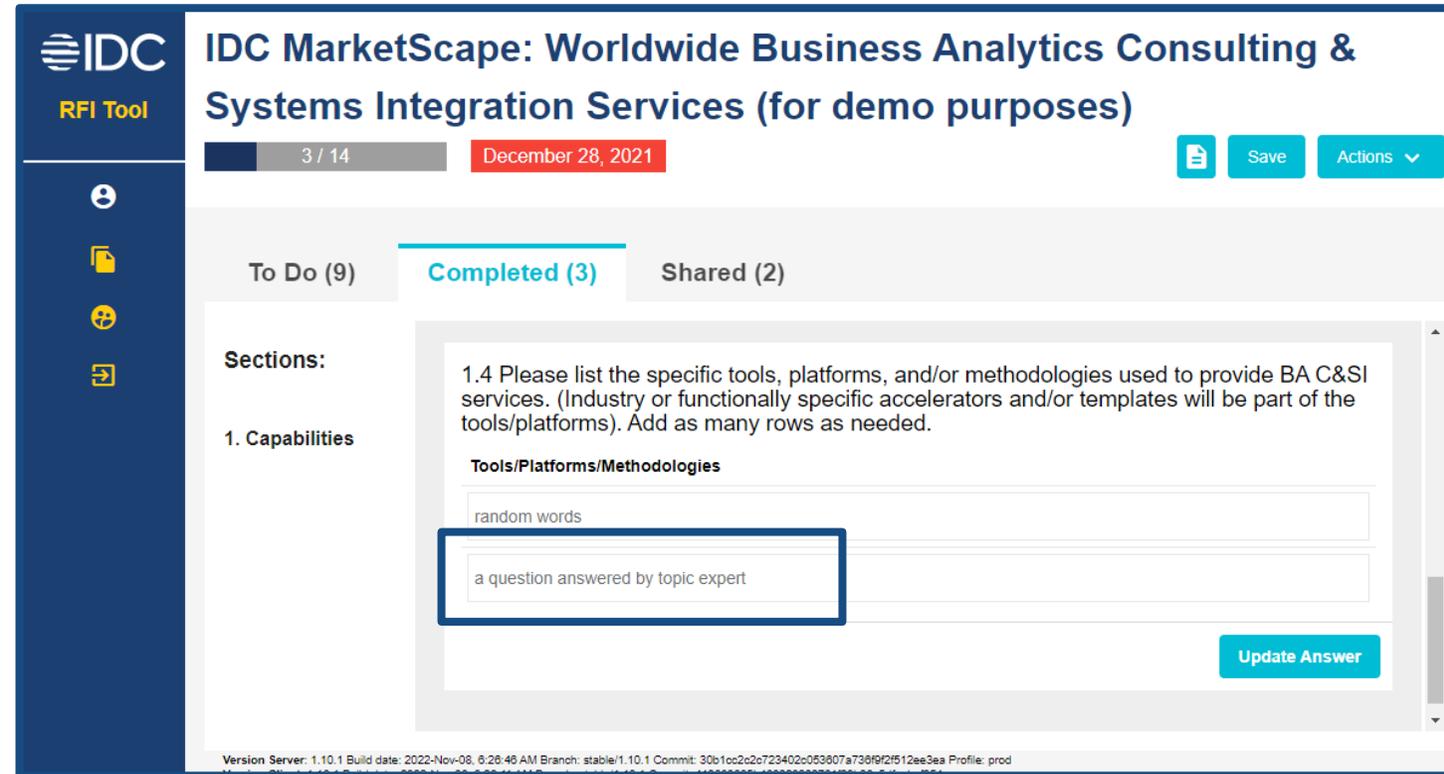
1. **Send to Colleagues** – sends out links with shared questions to Collaborators. Visible only when there are new items to share
2. **Contact IDC** – email is sent to the owner of the RFI (IDC Analyst(s))
3. **Export to PDF** – exports all questions (from all 3 tabs) with entered and Saved answers (Drafts are also exported)
4. **Export to Excel** – exports all questions (from all 3 tabs) with entered and Saved answers (Drafts are also exported)



# RFI Tool User Roles: Topic Expert: How to submit answers?

Access of the Topic Expert is a reflection of the RFI as seen by the Main Contact

- **Manage cooperative action by assigning questions or sections to other Collaborators**
- **Enter data/response into the question**
  - ✓ Responses can also come from a Collaborator who submits their response
- **Click “Answer” button**
  - ✓ Responses submitted by the Topic Expert automatically get reflected in the “Completed” tab



The screenshot displays the IDC MarketScope RFI Tool interface. The header shows the IDC logo, 'RFI Tool', and the title 'IDC MarketScope: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)'. The current question is 3 of 14, dated December 28, 2021. The interface is divided into three tabs: 'To Do (9)', 'Completed (3)', and 'Shared (2)'. The 'Completed' tab is active, showing a question under the section '1. Capabilities'. The question text is: '1.4 Please list the specific tools, platforms, and/or methodologies used to provide BA C&SI services. (Industry or functionally specific accelerators and/or templates will be part of the tools/platforms). Add as many rows as needed.' Below the question is a table with the header 'Tools/Platforms/Methodologies'. The first row contains 'random words'. A second row is highlighted with a blue box and contains the text 'a question answered by topic expert'. An 'Update Answer' button is located at the bottom right of the question area. The footer contains version and build information.

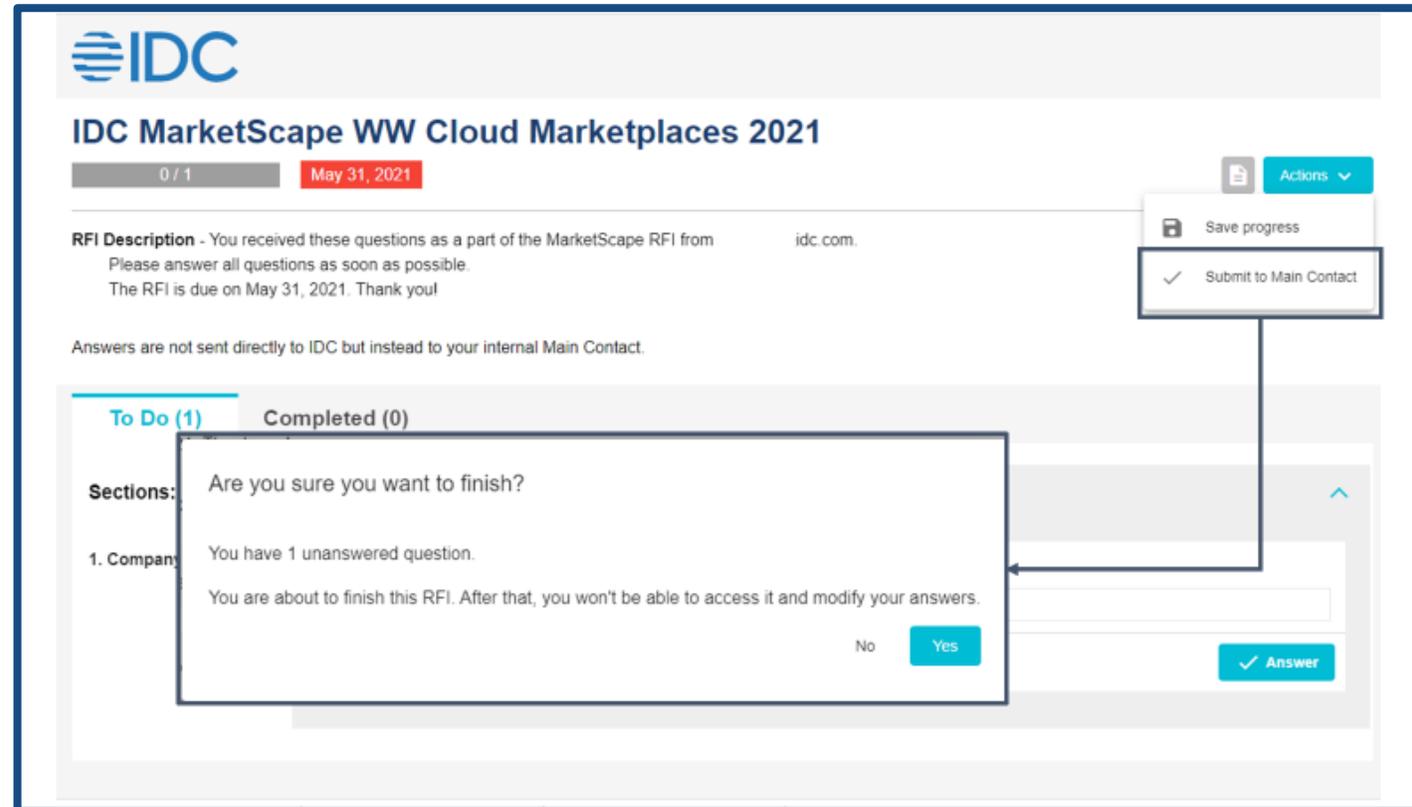
## RFI Tool User Roles: Collaborator

This user has access to specific questions of the RFI; no log-in required

[How to access](#) and [submit answers](#) | [How to navigate the RFI Tool](#)

# RFI Tool User Roles: Collaborator: How to access?

1. Send a request to the Main Contact or Topic Expert assigned for access for a specific RFI
2. Read the RFI Tool invite sent via [marketscape-noreply@idc.com](mailto:marketscape-noreply@idc.com)
3. Click on the link provided on the email; no log-in required

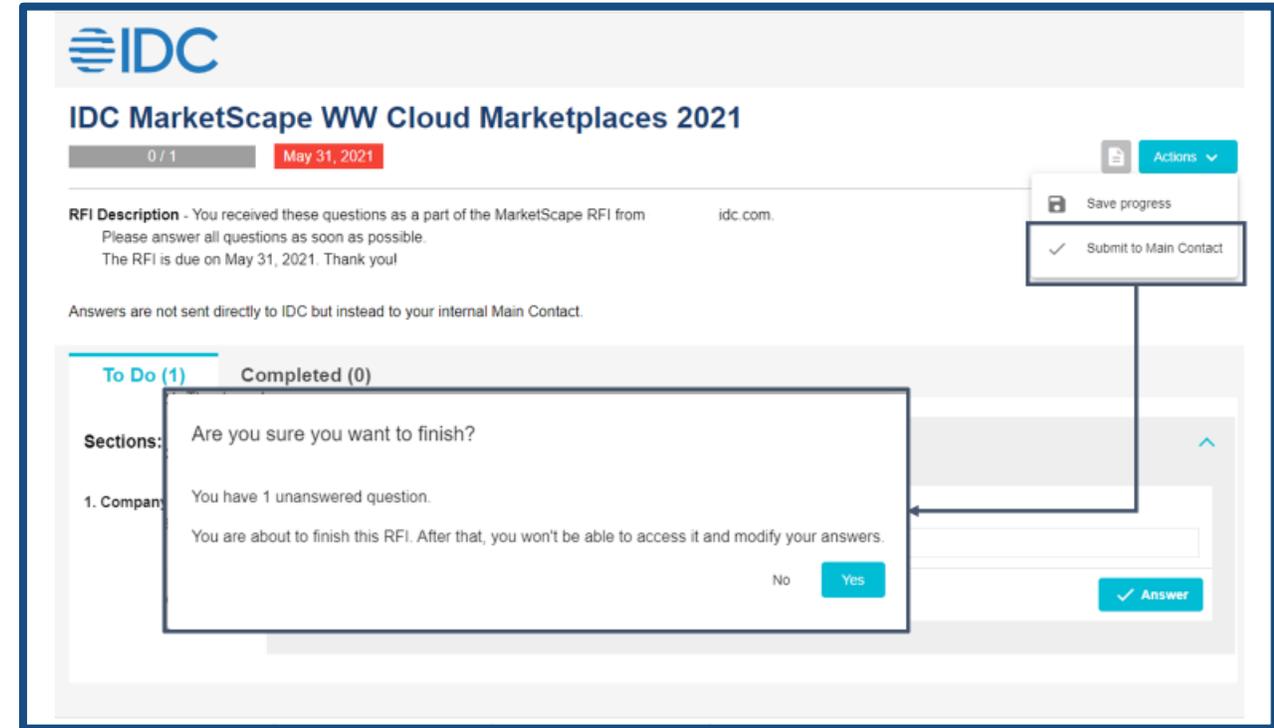


Logging in will take you directly to the questions assigned to you in the RFI

# RFI Tool User Roles: Collaborator: How to submit answers?

## Action Menu

- **Save Progress** – saves draft answers to the questions left in To Do tab; users can close RFI Tool without losing data
- **Submit to Main Contact** – sends all questions (from all 3 tabs) back to the Main Contact and Topic Expert
  - Using this will cut-off access for the user
  - Any data entered as Draft or Saved answers will be submitted to the Main Contact
  - On Main Contact view, answered questions will be tagged with "Answered by", questions with data entered but left unanswered will be tagged as "Draft" but unanswered questions will be tagged with "Returned Unanswered"



## How to Navigate the RFI Tool

There are three main parts: Dashboard, RFI Details and Tabs. However, access and functionalities in are determined by the type of user role accessing the RFI Tool. This section provides a detailed guide to navigate the RFI Tool.

# How to navigate the RFI Tool?

The dashboard displays all RFIs assigned to a Main Contact user. These may not be all RFIs currently assigned to your company. More than 1 Main Contact can be assigned to the RFI – coordinate with the analyst or project coordinator to register other users to manage the RFI and send back the data to IDC.

The screenshot shows the 'View all RFIs' dashboard in the IDC RFI Tool. The dashboard lists four RFIs with their titles, due dates, progress bars, and status. A 'Shared Questions' table is also visible at the bottom.

**1** Open the RFI by clicking on the title

**2** Due date: -3 days till the due date color changes to orange; 0+ days after due date color changes to red

**3** Progress and Status: Shows the number of questions in tab Completed

**4** After you share questions / sections with collaborators, you can see the detailed progress directly from the RFI dashboard and click go directly to Shared tab (eye icon)

**5** After you submit RFI to IDC, RFI is not visible until IDC Analyst closes the RFI internally but not accessible.

RFI Title	Due date (RFI completion date)	Progress	Status
IDC MarketScope WW Cloud Marketplaces 2021	May 31, 2021	6 / 48	In progress
IDC MarketScope: Worldwide Retail Innovation Management Platforms Software Providers 2021 Vendor Assessment		1 / 80	In progress
IDC MarketScope Business Analytics Services Vendor Questionnaire (for demo purposes)		16 / 16	In progress
IDC MarketScope: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)	December 28, 2021	4 / 14	In progress

Contact	Progress	Status	Questions
(rguttsnka@idc)	1 progress		
(bramot@idc.com)	In progress		

# How to navigate the RFI Tool?

## RFI Dashboard

1. RFI Titles - the list of RFI projects assigned to user
2. Due Date
3. Progress and Status
4. Collaborators Icon - opens the pop-up frame to display the list of collaborators and their progress
5. Sent RFIs - once submitted, the user will lose access to the RFI

The screenshot shows the IDC RFI Tool interface. The main area displays a list of RFI titles with columns for Due date, Progress, and Status. A sidebar on the left contains navigation icons. A 'Shared Questions' pop-up window is shown at the bottom, displaying a table of collaborators and their progress.

**1** Open the RFI by clicking on the title

**2** Due date: -3 days till the due date color changes to orange; 0+ days after due date color changes to red

**3** Progress and Status: Shows the number of questions in tab Completed

**4** Collaborators Icon - opens the pop-up frame to display the list of collaborators and their progress

**5** After you submit RFI to IDC, RFI is not visible until IDC Analyst closes the RFI internally but not accessible.

RFI Title	Due date (RFI completion date)	Progress	Status
IDC MarketScape WW Cloud Marketplaces 2021	May 31, 2021	6 / 48	In progress
IDC MarketScape: Worldwide Retail Innovation Management Platforms Software Providers 2021 Vendor Assessment		1 / 80	In progress
IDC MarketScape Business Analytics Services Vendor Questionnaire (for demo purposes)		16 / 16	In progress
IDC MarketScape: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)	December 28, 2021	4 / 14	In progress

Contact	Progress	Status	Questions
(igrudzbnska@idc.com)	1 progress	In progress	👁
(bramos@idc.com)	In progress	In progress	👁

# How to navigate the RFI Tool?

## RFI Details

Elements that display information:

- 1. IDC MarketScape Title**  
The title also serves as the working title for the subsequent IDC MarketScape publication
- 2. Progress Bar and Due Date**  
Questions only count when they are moved to the "Completed" tab; color of the Due Date changes as it approaches the deadline

The screenshot displays the IDC MarketScape RFI Tool interface. On the left is a dark blue sidebar with the IDC logo and 'IDC MarketScape RFI Tool' text. Below the logo are user options: 'Sophia Cuevas', 'List of RFIs', 'Switch user', and 'Log out'. The main content area has a title 'IDC MarketScape: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)' with a circled '1' next to it. Below the title is a progress bar showing '4 / 14' and a due date 'December 28, 2021' with a circled '2'. To the right of the due date is a 'Progress / Due date' label with a circled '2', a 'Save' button, and an 'Actions' dropdown with a circled '3'. The main content area contains an 'RFI Description' and a 'Business Analytics Consulting & Systems Integration Services' section. Below this is a 'To Do (8)' tab, a 'Completed (4)' tab, and a 'Shared (2)' tab. The 'Completed' tab is active, showing a 'Sections' list with '1. Capabilities' and '2. Strategy'. The 'Strategy' section is expanded, showing a 'Go-To-Market' sub-section with a circled '4'. Below this is a text input field for 'Relevant publication' with a 'Remove' button and an 'Add row' button. At the bottom right of the 'Strategy' section are 'Share' and 'Answer' buttons.

# How to navigate the RFI Tool?

## RFI Details

Elements that display information:

### 3. RFI Description

Click on the icon to toggle between hiding or displaying text

### 4. Section Title and Description

Questions in the RFI are categorized under different parts; the description sections can contain important information or instructions that apply specifically to the questions in that grouping

1 IDC MarketScape RFI Tool

2 IDC MarketScape: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)

4 / 14 December 28, 2021 Progress / Due date

3 Save Actions

RFI Description - You have been asked to complete this survey because you would be included in the IDC MarketScape on Business Analytics Consulting & Systems Integration Services report. Take note that this is a report separate from the overall IDC MarketScape on Business Analytics research that is currently taking place. These are additional questions specific to the Consulting & Systems Integration (C&SI) Services.

Business Analytics Consulting & Systems Integration Services:  
This IDC MarketScape provides vendor assessment with regard to the advisory, assessment, plan, design, and build phases of the business analytics services value chain.

To Do (8) Completed (4) Shared (2)

Sections:

1. Capabilities

2. Strategy

Capabilities

11 questions | 4 answered | 2 shared

Share section

Strategy

Go-To-Market

2.1 Please cite any relevant thought leadership on BA C&SI services that was published by a member(s) of your BA practice in 2019.

Relevant publication

Remove

Add row

Share Answer

4

# How to navigate the RFI Tool?

## *RFI Details*

*Elements that execute actions:*

### 5. Save and Close Button

Allows users to save draft answers which would be retained until the next session

### 6. Actions Menu

Explore additional functions of the RFI Tool

### 7. Share Section Button\*

Share all questions in the To Do tab under this section with selected Collaborator(s); questions in the Completed and Shared tabs are excluded

The screenshot displays the IDC MarketScape RFI Tool interface. On the left is a dark blue sidebar with the IDC logo and 'IDC MarketScape RFI Tool' text. Below the logo are user options: 'Sophia Cuevas', 'List of RFIs', 'Switch user', and 'Log out'. The main content area is titled 'IDC MarketScape: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)'. It shows a progress bar at 4/14 and a date of December 28, 2021. A 'Save' button (5) and an 'Actions' menu (6) are in the top right. The 'RFI Description' explains the survey's purpose. Below, there are tabs for 'To Do (8)', 'Completed (4)', and 'Shared (2)'. The 'To Do' tab is active, showing sections 'Capabilities' (7) and 'Strategy'. The 'Capabilities' section has 11 questions, 4 answered, and 7 shared, with a 'Share section' button. The 'Strategy' section includes a 'Go-To-Market' question (2.1) about thought leadership in 2019, with a 'Relevant publication' input field, a 'Remove' button, and an 'Add row' button. At the bottom right, there are 'Share' (8) and 'Answer' (9) buttons.

\* This function is not available to the Collaborators

# How to navigate the RFI Tool?

## *RFI Details*

*Elements that execute actions:*

### 8. Share Question Button\*

Assign a question to share with selected Collaborator(s)

### 9. Answer Button

Any data saved as a response to the question is confirmed and moved to the Completed tab

The screenshot displays the IDC MarketScape RFI Tool interface. The header includes the IDC logo and the title "IDC MarketScape: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)". The user is identified as Sophia Cuevas, and the survey progress is shown as 4/14 questions completed on December 28, 2021. The interface is divided into three tabs: "To Do (8)", "Completed (4)", and "Shared (2)". The "To Do" tab is active, showing a list of sections: "1. Capabilities" and "2. Strategy". The "Capabilities" section is expanded, showing 11 questions, with 4 answered and 7 shared. A "Share section" button is visible next to the "Capabilities" section. The "Strategy" section is also expanded, showing a question titled "2.1 Please cite any relevant thought leadership on BA C&SI services that was published by a member(s) of your BA practice in 2019." Below the question, there is a "Relevant publication" input field with a "Remove" button and an "Add row" button. At the bottom of the question area, there are "Share" and "Answer" buttons. The interface also features a "Save" button and an "Actions" dropdown menu in the top right corner.

\* This function is not available to the Collaborators

# How to navigate the RFI Tool?

## *RFI Details*

*Elements that help navigate:*

### **10. Tabs with Grouped Questions**

Various "tabs" display questions based on the following groupings:

- "To Do" - View unanswered questions
- "Completed" - View saved question responses
- "Shared" - View all shared questions with Collaborators\*
- Numbers on the tab labels indicate the number of questions in each group

The screenshot displays the IDC MarketScape RFI Tool interface. The header includes the IDC logo and the title "IDC MarketScape: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)". The user is identified as Sophia Cuevas, and the survey progress is shown as 4 / 14 questions completed on December 20, 2021. The main content area features three tabs: "To Do (8)", "Completed (4)", and "Shared (2)". A callout box labeled "10" points to these tabs. Below the tabs, a "Sections:" dropdown menu is open, showing "1. Capabilities" and "2. Strategy", with a callout box labeled "11" pointing to it. The "Capabilities" section is selected, showing "11 questions | 4 answered | 7 not" and a "Share section" button. Below this, the "Strategy" section is visible, with a question "2.1 Please cite any relevant thought leadership on BA C&SI services that was published by a member(s) of your BA practice in 2019." and a "Relevant publication" input field with a "Remove" button. A callout box labeled "12" points to the "Relevant publication" input field. At the bottom, there are "Add row", "Share", and "Answer" buttons.

\* This function is not available to the Collaborators

# How to navigate the RFI Tool?

## *RFI Details*

*Elements that help navigate:*

### 11. List of Sections in the RFI

- Click the labels to go to the questions
- Under the "Shared" tab, the list of Collaborators are also displayed and clicking on their labels will display the questions shared with that specific user

### 12. Summary of the Questions in Each Section

- Click on each label to go to the location of the questions
- Numbers on the tab labels indicate the number of questions in each group

The screenshot displays the IDC MarketScape RFI Tool interface. The header includes the IDC logo and the title "IDC MarketScape: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)". The user is identified as Sophia Cuevas, and the survey progress is shown as 4/14 questions completed on December 28, 2021. The interface features a sidebar with navigation options: "List of RFIs", "Switch user", and "Log out". The main content area shows a "To Do (8)" tab selected, with "Completed (4)" and "Shared (2)" tabs also visible. A "Sections:" dropdown menu is open, listing "1. Capabilities" and "2. Strategy". The "Capabilities" section is currently active, showing "11 questions | 4 answered | 2 done". The "Strategy" section is also visible, with a question "2.1 Please cite any relevant thought leadership on BA C&SI services that was published by a member(s) of your BA practice in 2019." and a "Relevant publication" input field. The interface includes "Share section", "Add row", "Remove", "Share", and "Answer" buttons.

# How to navigate the RFI Tool?

## Question Tabs

**“To Do” tab** - View unanswered questions

- This serves as default view upon opening the RFI
- Questions may already contain data:
  - ✓ Draft answers saved by Main Contact
  - ✓ Collaborators may have clicked "Submit to Main Contact", labelled as: "Done" or "Question Unanswered"
  - ✓ Answers submitted on a prior RFI, labelled as "Historical"

The screenshot displays the IDC MarketScape RFI tool interface. At the top, the title is "IDC MarketScape: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)". Below the title, there is a progress indicator "1 / 14" and a date "December 28, 2021". On the right side, there are buttons for "Save" and "Actions".

The interface is divided into three tabs: "To Do (11)", "Completed (1)", and "Shared (2)". The "Completed (1)" tab is currently selected.

Under the "Completed (1)" tab, there is a section titled "Capabilities" with a sub-section "1. Capabilities". The main content area is titled "Offering" and contains a question: "1.1 Please provide a list of all your BA C&SI services offerings. Add as many rows as necessary. Please list your current BA consulting and systems integration services below".

Below the question, there are three text input fields, each containing the placeholder text "random words". At the bottom right of the input area, there is a blue button labeled "Update Answer".

# How to navigate the RFI Tool?

## Question Tabs

**“To Do” tab** - View unanswered questions

On this view, questions may contain different tags indicating important information:

- **Conditional:** Additional questions will be displayed depending on the answer provided
- **Historical:** Any answers previously submitted by your colleague in a prior RFI
- **Done:** Hover above this label to view the email address of the person (Collaborator/Topic Expert) who responded
- **Question Unanswered:** Collaborator/Topic Expert returned the question without providing any answers

The screenshot displays the IDC MarketScape interface for a Worldwide Business Analytics Consulting & Systems Integration Services RFI. The page title is "IDC MarketScape: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)". The current question is 1 of 14, dated December 28, 2021. There are "Save" and "Actions" buttons in the top right. The interface shows three tabs: "To Do (11)", "Completed (1)", and "Shared (2)". The "Completed (1)" tab is active. Under "Sections:", there is a "1. Capabilities" section. The "Offering" section contains a question: "1.1 Please provide a list of all your BA C&SI services offerings. Add as many rows as necessary. Please list your current BA consulting and systems integration services below". Below the question are three text input fields, each containing the placeholder text "random words". An "Update Answer" button is located at the bottom right of the question area.

# How to navigate the RFI Tool?

## Question Tabs

**“Completed” tab** - View answered questions

- This tab only contains questions that have been marked as "Answered" by the Main Contact
- If a question has been moved into the Completed tab, it cannot be returned back to the To Do tab or shared with other users
- If a wrong response was submitted, users with Main Contact access must:
  - ✓ Click on the “Update Answer” button
  - ✓ Amend the response
  - ✓ Click on “Save New Answer” button
- The question tags are no longer visible in this tab

The screenshot displays the IDC MarketScape interface for a specific RFI question. The title is "IDC MarketScape: Worldwide Business Analytics Consulting & Systems Integration Services (for demo purposes)". The question number is "1 / 14" and the date is "December 28, 2021". There are "Save" and "Actions" buttons in the top right. Below the title, there are three tabs: "To Do (11)", "Completed (1)", and "Shared (2)". The "Completed" tab is selected. Under "Sections:", there is a section titled "1. Capabilities". Within this section, there is an "Offering" field with a prompt: "1.1 Please provide a list of all your BA C&SI services offerings. Add as many rows as necessary. Please list your current BA consulting and systems integration services below". There are three input fields, each containing the placeholder text "random words". An "Update Answer" button is located at the bottom right of the offering field.

# How to navigate the RFI Tool?

## Question Tabs "Shared" tab

Displays questions assigned to Collaborators\*

The screenshot shows the RFI Tool interface with the following elements and callouts:

- Callout 1:** Points to the "Shared (2)" tab in the top navigation bar. Text: "When Collaborators submit their responses, questions get automatically moved from 'Shared' to the 'To Do' tab".
- Callout 2:** Points to a text input field containing "111111" under the "Offering" section. Text: "Data contained in the questions reflects the draft answers saved by the Collaborator".
- Callout 3:** Points to the left-hand navigation panel. Text: "The left panel will display navigation links for grouped questions (according to 'Sections' and 'Shared with')".
- Callout 4:** Points to a "Return to To Do" button in the bottom right corner. Text: "Shared questions will not be accessible to the Main Contact or Topic Expert who shared the question. Main Contact/Topic Expert needs to click 'Return to To Do' to be able to respond to a shared question; doing this will cut-off Collaborator access".

\* This function is not available to the Collaborators



Trouble? Feedback? Comments? Suggestions?

Write to us at [idcmarketscape@idc.com](mailto:idcmarketscape@idc.com)!

We are always happy to help! Also, we remain open to receiving any feedback about your experience with using the RFI Tool. Feel free to use the email address above to reach our team!



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