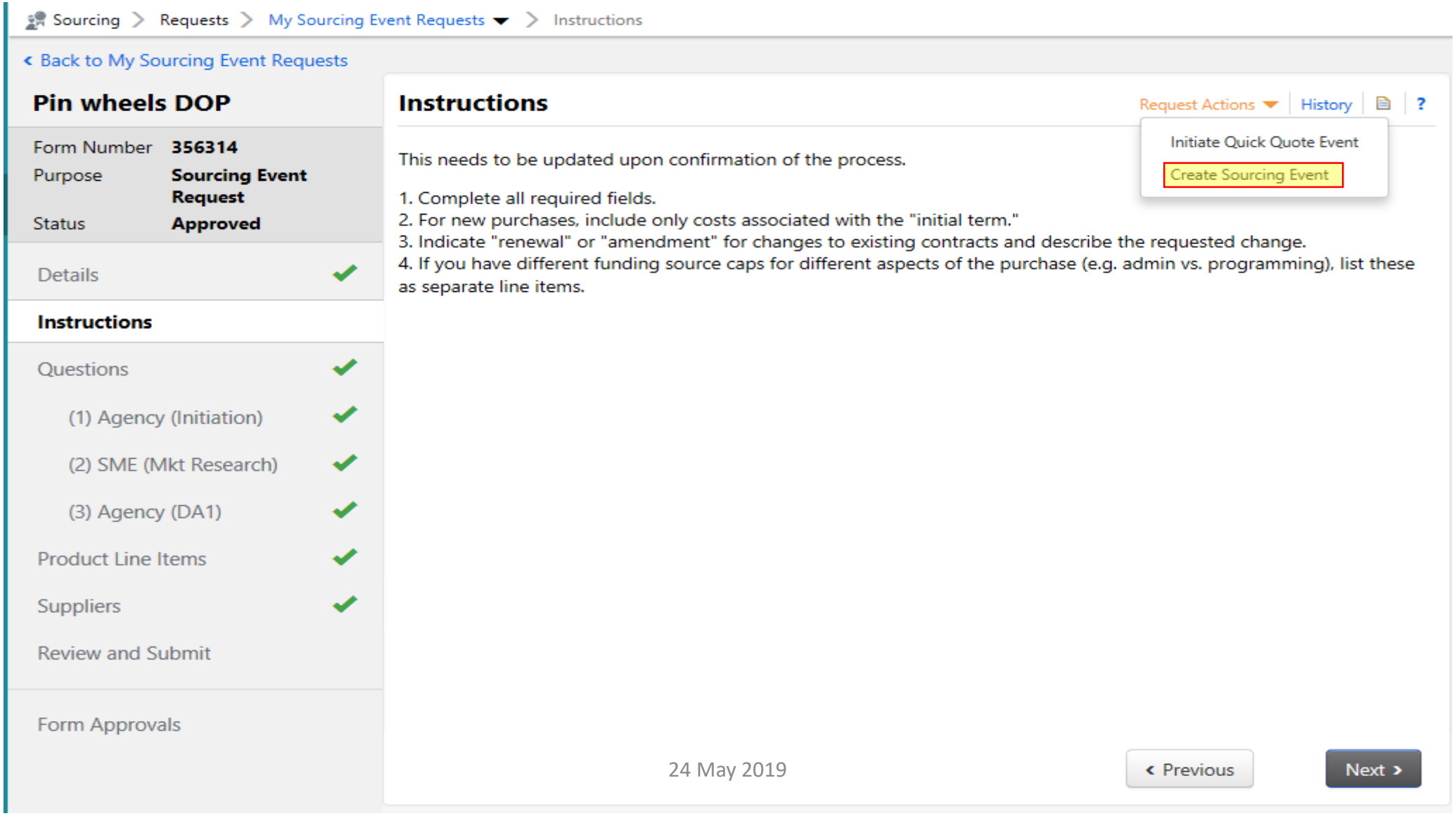
CREATE SOURCING EVENT

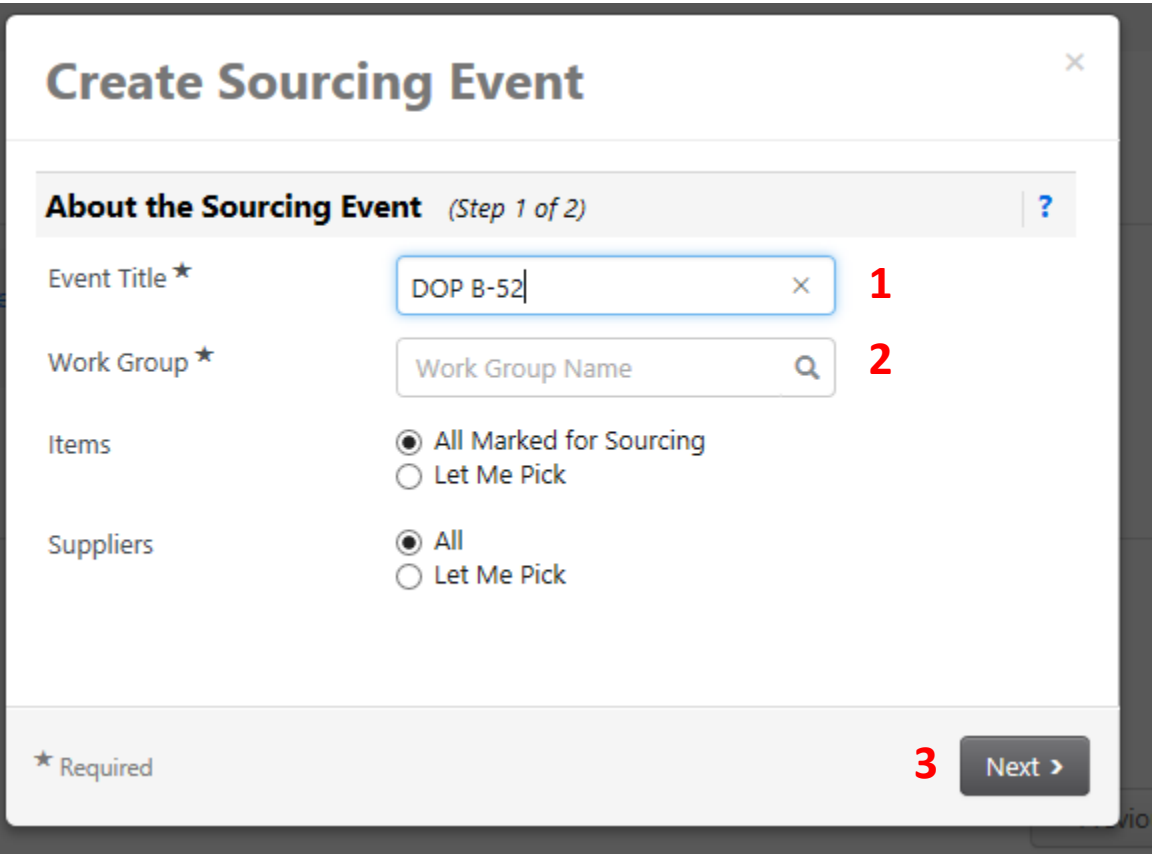
How to create a Sourcing Event from a Request With DPA

- Once the Form Request has been approved
- Click on **Request Actions**
- Click on **Create Sourcing Event**

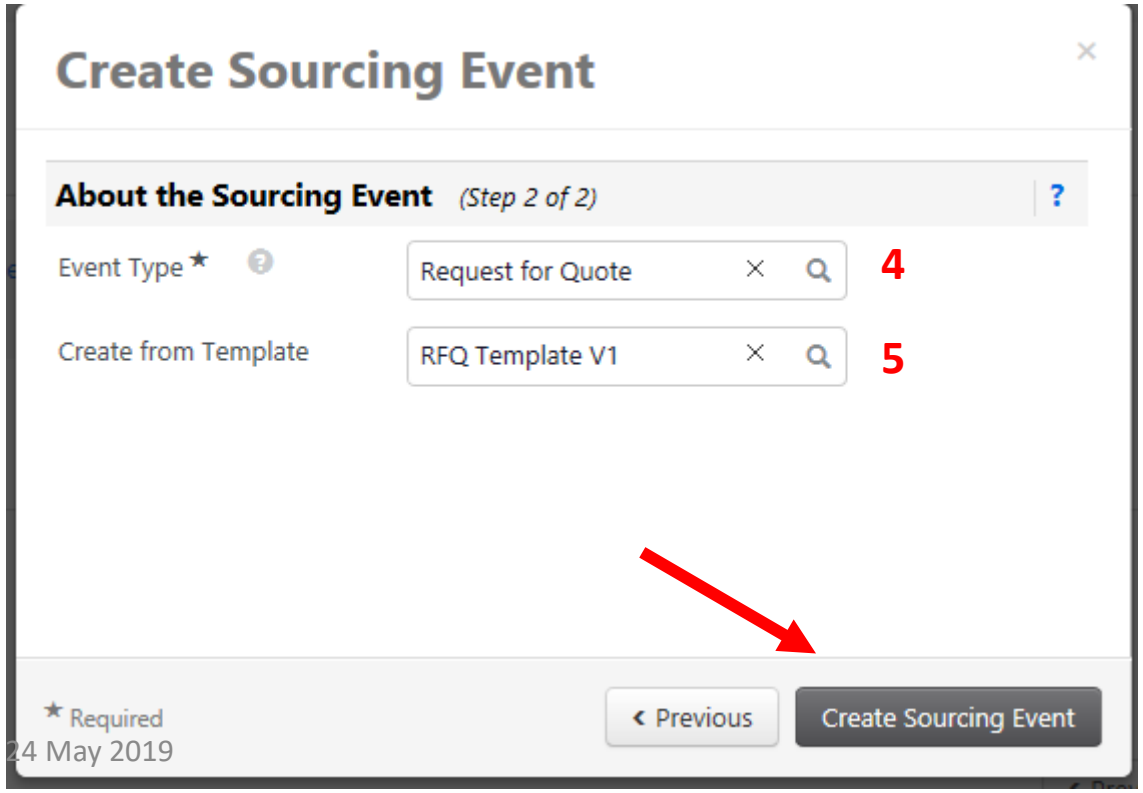


How to create a Sourcing Event from a Request

- File out all fields

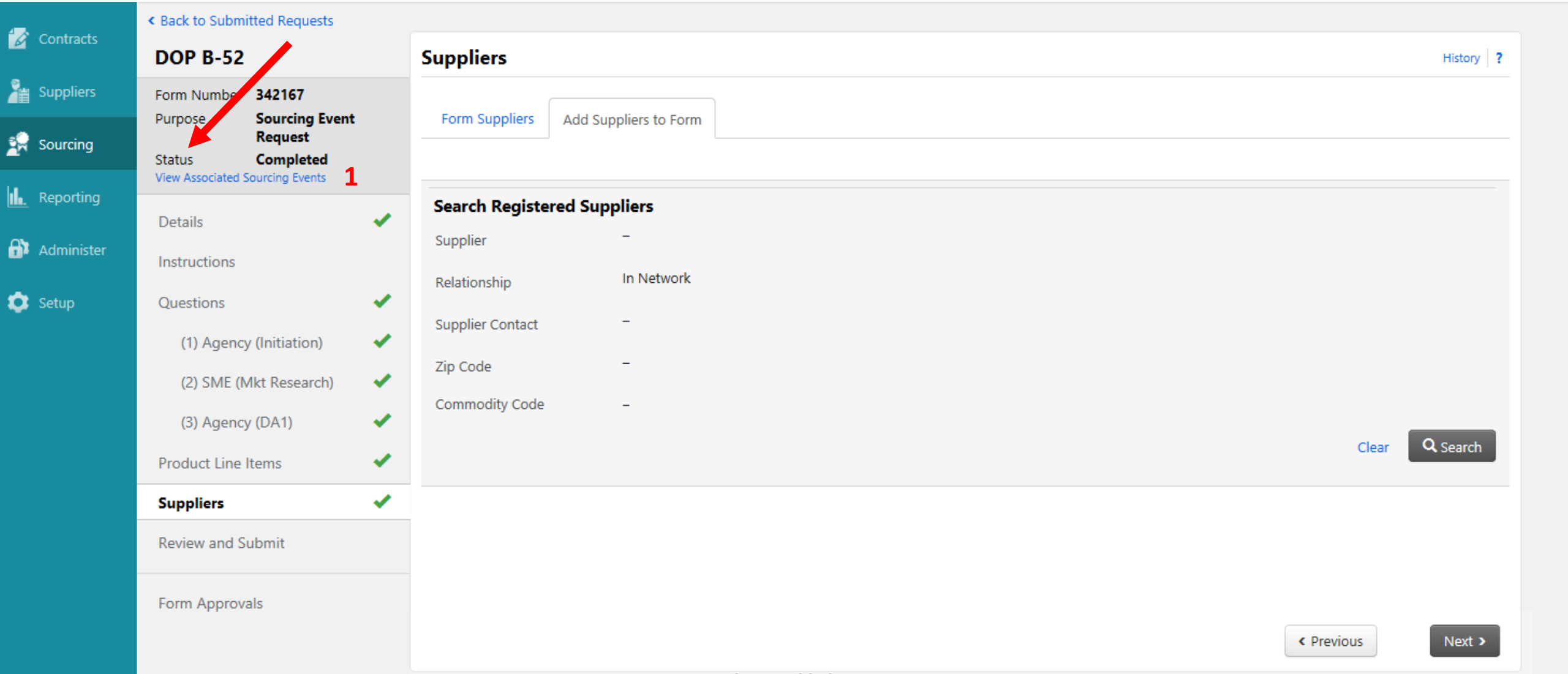


- Select the requested information
- Once finished click on **Create Sourcing Event**



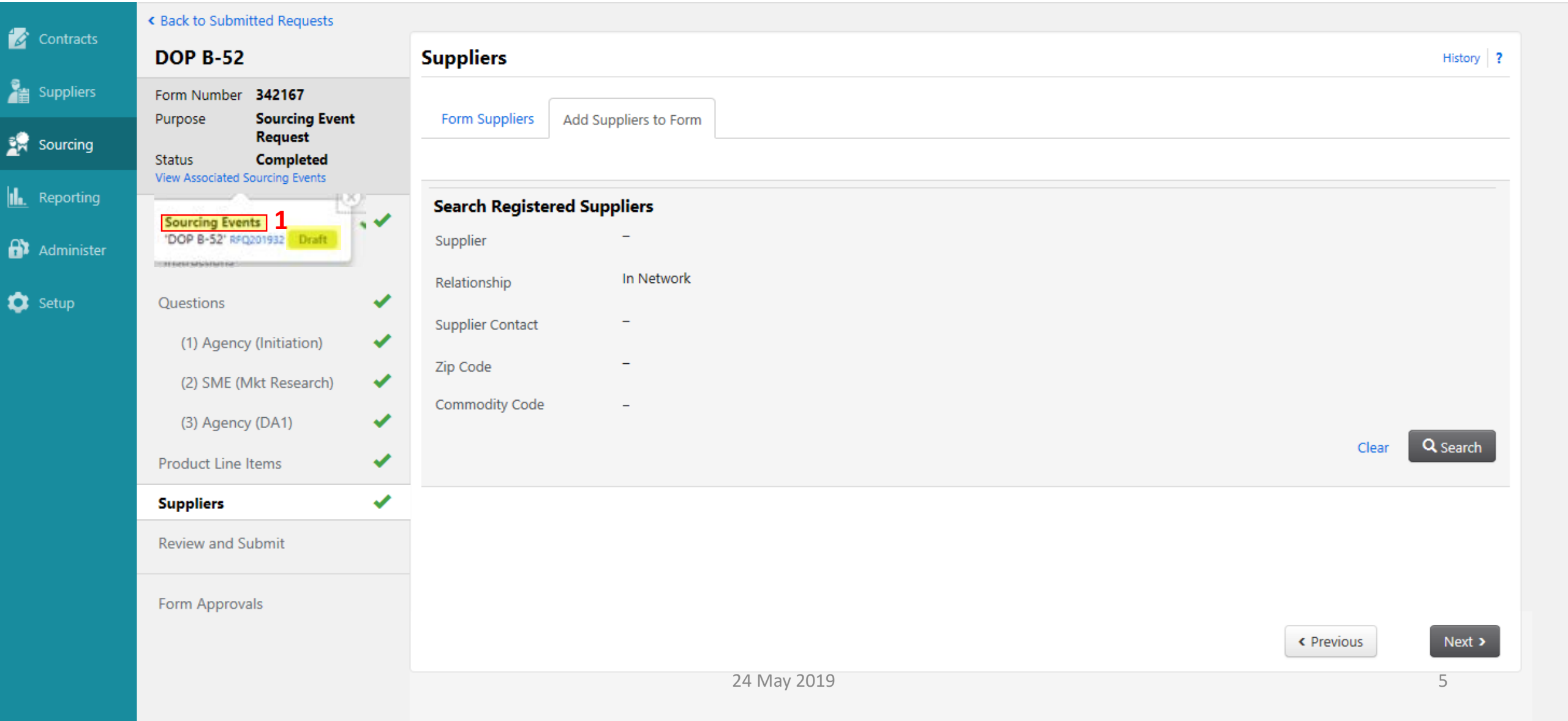
How to create a Sourcing Event from a Request

- The newly created Sourcing event should be opened
- If Sourcing event isn't open find your original Form Request
- A new heading is in view under **Status**
    - **Click on "View Associated Sourcing Events"**



How to create a Sourcing Event from a Request

- Click on the new RFQ number in view



How to create a Sourcing Event from a Request

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Setup

Sourcing > Sourcing Events > Search Events > Setup

RFQ Sample DOP
RFQ20190060

Type: **Request for Quote**
Event Status: **Draft**

Settings and Content

- Setup
- Users
- Description
- Prerequisites 3
- Buyer Attachments 0
- Supplier Attachments
- Questions 2
- Additional Item Fields
- Items 5
- Suppliers 2
- Review and Submit

Tools

Setup

Event Actions | History | ?

- Copy
- Delete
- Export Event as PDF
- Hide Event Prices — Hides prices from anyone viewing event Marks prices as hidden

Event Title * RFQ Sample DOP

Event Type Request for Quote

Work Group State of Idaho

Event Number * RFQ20190060 — The Pen allows you to edit the Event Number- Do Not change this, it could cause problems during this process

Stage Title

NGIP Codes

Reporting NGIP Code – Edit
- *Must add a Reporting NIGP code*

Additional NGIP Codes – Edit
- *Add additional Commodity codes to include more Suppliers to the Sourcing Event*

Forced Supplier Invitation by NGIP Code: (•) Yes ( ) No — *This is set to yes by default, this will add suppliers based on commodity code*

Payment

Currency US Dollar

Estimated Value USD — *Value of this Sourcing Event*

Payment Terms 0% 0, Net 30 — *Select Net 30*

Bid and Evaluation

Sealed Bid ( ) Yes (•) No — *Will not show the supplier bid response until the sealed bid open date passes*

Respond by Proxy Yes — *This is yes by default, it allows you to input a paper bid*

Use Panel Questionnaire No

Auto Score No

Cost Analysis No

Alternate Items ( ) Yes (•) No — *If you are going to allow alternate items to be suggested than set to Yes – Additional configuration is available upon adding Items*
You will see a new checkbox under options when adding an item

Evaluations

How to create a Sourcing Event from a Request

Continued from “Setup” tab

Display and Communication

Restrict Buyer Notifications No *Use with our public site, all Sourcing events are automatically on the public site*

Dates

Time Zone MDT/MST - Mountain Standard Time (US/M

Open Date ★ mm/dd/yyyy hh:mm a

Event will open even if the start time is in the past

Close Date ★ mm/dd/yyyy hh:mm a

Make sure close date is within the open hours of your agency.

Sealed Bid Open Date ★ ☐ Same as Close Date

mm/dd/yyyy hh:mm a

If Sealed Bid is selected above than these 2 fields open up-enter date the Sealed Bid will be opened
And check if you would like this info to be shown to the vendor

Show Sealed Bid Open Date to Supplier ☐ Show Sealed Bid Open Date to Supplier

Q&A Submission Close Date ★ ☑ Same as Close Date

Select date you want to stop taking questions

How to create a Sourcing Event from a Request

- **Event Creator** - Can create new events for a work group and assign users to the event
- **Stakeholders** – Can view all events in a work group

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DOP B-52 for RFQ Event Title
RFQ201932

Type: **Request for Quote**
Event Status: **Draft**
Form Request: DOP B-52

Settings and Content

- Setup ✓
- **Users** ✓
- Description ✓
- Prerequisites 0
- Buyer Attachments 0
- Supplier Attachments ✓
- Questions 0
- Additional Item Fields
- Items 1
- Suppliers 0
- Review and Submit ✓

Tools

Users

Event Actions | History | ?

Event Creator - Can create, assign users to event
Can't view or edit events created by other Event Creators

Event Creator ★ — Benedict, Forrest

Event Owners ★ — Event Owners have full control over this event: — Edit Users

Benedict, Forrest

Event Managers on this Work Group have full control over this event:

Benedict, Forrest
Butler, Karen
Buyer, Agency

- **Shows the users assigned to the event**
- **Users are inherited from the associated work Group**
- **May be edited on the specific event**

Contacts ★ — Contact information for these users is shown to suppliers: — Edit Users

Benedict, Forrest

Stakeholders — Stakeholders can view the event and responses: — Edit Users

No User Selected

Stakeholders on this Work Group can view the event and responses

★ Required

‹ Previous | Save Progress | Next ›

How to create a Sourcing Event from a Request

- Description page, change to meet your needs
- This is mandatory
- Can add to the description by clicking on **Copy from Library**

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Sourcing > Sourcing Events > Search Events > Description

RFQ Sample DOP
RFQ20190060

Type: **Request for Quote**
Event Status: **Draft**

Settings and Content
- Setup
- Users
- **Description** 1
- Prerequisites 3
- Buyer Attachments 0
- Supplier Attachments
- Questions 2
- Additional Item Fields
- Items 5
- Suppliers 2
- Review and Submit

Tools

Description

Event Actions | History | ?

Copy from Library

Please enter a description for this event, or copy from library. ★

Format | (inherited font) | (inherited size)

1. Purpose
Agency is requesting quotes for description of commodity or service, as further detailed below.

The contact for this RFQ is:
Name of RFQ Lead, Agency
Phone
Fax
E-mail

2. Background
If needed otherwise remove this section

3. Time lines
Quotes Due (by 5:00 p.m. MT) Due Date

If needed add: DELIVERED (and INSTALLED) within # days/weeks ARO (after receipt of order) _____

4. Specifications or Business and Scope of Work if for services
See Exhibit A found on the Questions section in this Sourcing Event
You may list specifications in this space, without a separate Exhibit, if they are short

Contractor will deliver commodity, FOB Destination, locationon or before dateor as coordinated with the Agency contact. Agencycontact for delivery is:
Agency Contact name
Phone
Fax

Stage Description Used if you have multiple stages. We don't use

★ Required

< Previous | Save Progress | Next >

Menu Search (Alt+M)

How to create a Sourcing Event from a Request

- The template has Prerequisites already
  - These are mandatory for Suppliers to view
  - These items can be deleted or edited by selecting the **Actions** button

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Sourcing > Sourcing Events > Search Events > Prerequisites

RFQ Sample DOP
RFQ20190060

Type: **Request for Quote**
Event Status: **Draft**

Settings and Content
- Setup
- Users
- Description
- **Prerequisites** 1 (3)
- Buyer Attachments (0)
- Supplier Attachments
- Questions (2)
- Additional Item Fields
- Items (5)
- Suppliers (2)
- Review and Submit

Tools

Prerequisites

Event Actions | History | ?

★ Required to Enter Bid

Instructions to supplier	Prerequisite Content	
Please review and confirm your agreement to the Terms and Conditions for the RFP. ★	Terms and Conditions	Actions
Please download the Solicitation Instructions ★	Solicitation Instructions	Actions
Download the signature page, please sign and upload. Signature page is Required for Award of Sourcing Event ★	Signature Page Signature-Page-RFQ.pdf	Actions

Add Prerequisite

‹ Previous | Save Progress | Next ›

How to create a Sourcing Event from a Request

- Add items you want the Vendor to view, you can't make these mandatory
- Include such items as diagrams or additional information that will help the Vendor

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DOP B-52 for RFQ Event Title
RFQ201932

Type: **Request for Quote**
Event Status: **Draft**
Form Request: DOP B-52

Settings and Content

- Setup ✓
- Users ✓
- Description ✓
- Prerequisites 0
- **Buyer Attachments** 1 0
- Supplier Attachments ✓
- Questions 0
- Additional Item Fields
- Items 1
- Suppliers 0
- Review and Submit ✓

Tools

Buyer Attachments

Event Actions | History | ?

Add Attachment

Please add your attachments below.

6 MANDATORY SUBMISSION REQUIREMENTS Scope of Work.docx	2	15 KB	Forrest Benedict	5/3/2019 10:30:30 AM	Actions

Edit Properties
Download
Upload New Version
Version History
Delete

Buyer attachments – Add any item that will help the Supplier determine if they want to bid on the Sourcing Event

‹ Previous | Save Progress | Next ›

How to create a Sourcing Event from a Request

- There are default Questions that are added
  - You can delete the Questions you don't want
- You can add additional questions you want the Vendor to acknowledge, these questions can be mandatory
- You can also require files to be downloaded/uploaded from the Vendor

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Sourcing > Sourcing Events > Search Events > Questions

RFQ Sample DOP
RFQ20190060

Type: **Request for Quote**
Event Status: **Draft**

Settings and Content

- Setup
- Users
- Description
- Prerequisites 3
- Buyer Attachments 0
- Supplier Attachments
- **Questions** 1 2
- Additional Item Fields
- Items 5
- Suppliers 2
- Review and Submit

Tools

Questions

Event Actions | History | ?

Please enter your questions into groups below. Add or Import | Export Questions

★ Response is Required

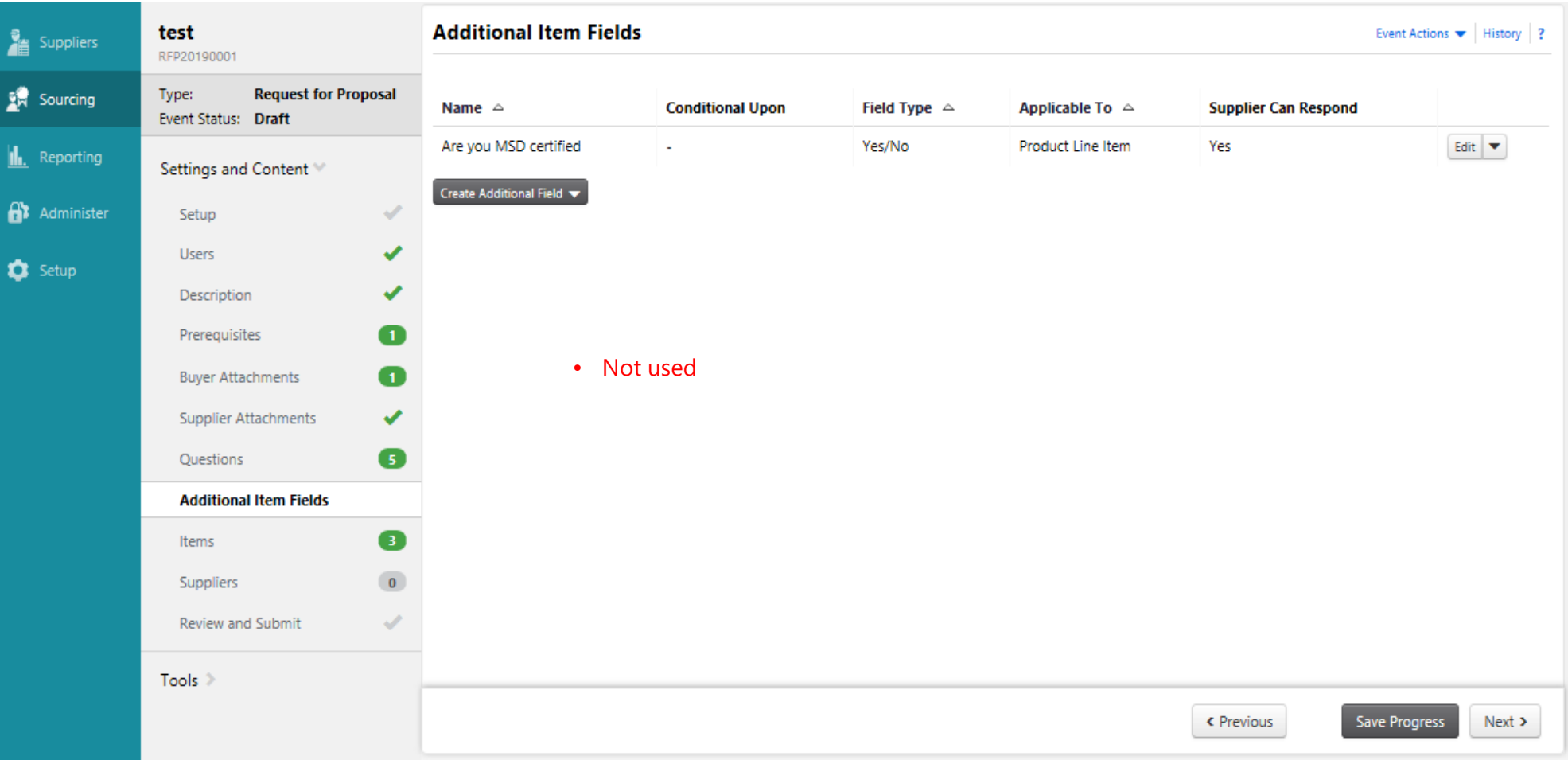
Group 1 — Manage Group | Delete Selected Questions

#	Question Text	Conditional Upon	Response Type		
1.1	Specifications or Scope of 'Work ★	-	File Upload	Edit	☐
1.2	Exhibit B Price sheet ★	-	File Upload	Edit	☐

Add Question

‹ Previous | Save Progress | Next ›

How to create a Solicitation for a Request



- Not used

How to create a Solicitation for a Request

Edit/Add Line Items

- Click **Edit** to make changes to the line item or delete it
  - By editing the Line Item you can add more information to the Item
- Click **Add Product Line Item** to add additional line items

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Training DOP
RFP20190005

Type: **Request for Proposal**
Event Status: **Pending**
Form Request: Training DOP

Settings and Content
- Setup ✓
- Users ✓
- Description ✓
- Prerequisites 2
- Buyer Attachments 0
- Supplier Attachments ✓
- Questions 0
- Additional Item Fields
- **Items** 1 2
- Suppliers 2

Evaluations
Tools

Items

Event Actions | History | ?

Product Line Items (2) | Service Line Items (0)

Go To All Groups | Add or Import | Export Items

★ Unit Price is Required
Estimated Delivery Date is Required

Group P1 (1 - 2 of 2 items) Manage Group | Delete Selected Item(s)

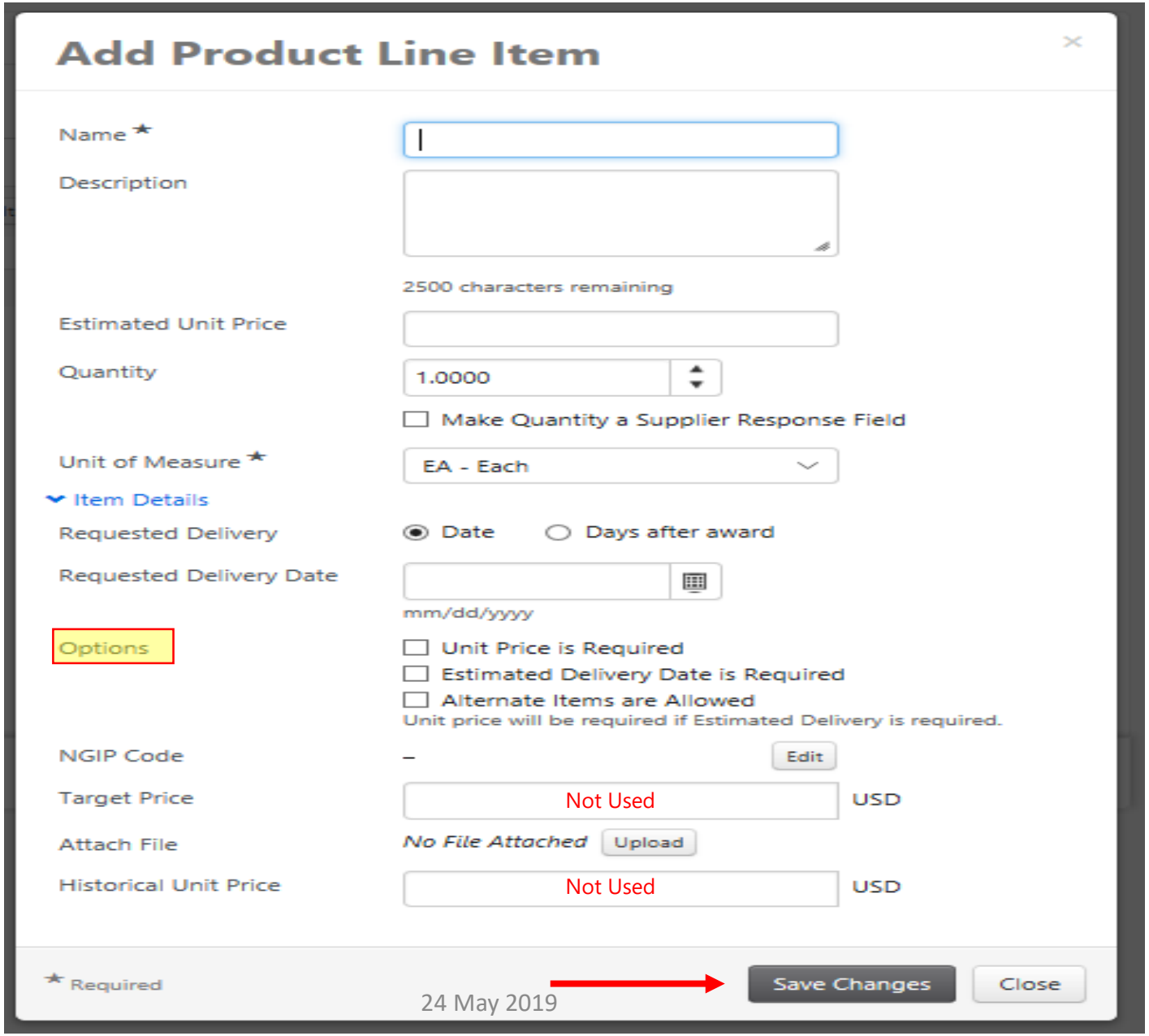
#	Name	Description	Estimated Unit Price	Qty	UOM	Requested Delivery		
P1.1	**Pen** ★	pink	1500	1	Each	4/20/2019	2 Edit	☐
P1.2	**Pencil**	to write with	500.00	10	Each	–	Edit	☐

Add Product Line Item
3

‹ Previous | Save Progress | Next ›

How to create a Solicitation for a Request Additional Line Items

- **Options**
  -These 3 options are for Vendors
  -First 2 options- Vendor must provide info in order to bid



How to create a Solicitation for a Request

- This is what a completed Items section looks like
- Star by **Name** means there is a mandatory requirement for that line item

Suppliers
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Training DOP
RFP20190005

Type: **Request for Proposal**
Event Status: **Pending**
Form Request: Training DOP

Settings and Content

- Setup ✓
- Users ✓
- Description ✓
- Prerequisites 2
- Buyer Attachments 0
- Supplier Attachments ✓
- Questions 0
- Additional Item Fields
- **Items** 1 2
- Suppliers 2

Evaluations

Tools

Items

Event Actions | History | ?

Product Line Items (2) | Service Line Items (0)

Go To: All Groups | Add or Import | Export Items

★ Unit Price is Required
Estimated Delivery Date is Required

Group P1 (1 - 2 of 2 items) — Manage Group | Delete Selected Item(s)

#	Name	Description	Estimated Unit Price	Qty	UOM	Requested Delivery		
P1.1	**Pen** ★	pink	1500	1	Each	4/20/2019	Edit	☐
P1.2	**Pencil**	to write with	500.00	10	Each	–	Edit	☐

Add Product Line Item

‹ Previous | Save Progress | Next ›

How to create a Solicitation for a Request

- This section/tab shows Suppliers added by NIGP code

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DOP B-52 for RFQ Event Title
RFQ201932

Type: **Request for Quote**
Event Status: **Draft**
Form Request: DOP B-52

Settings and Content

- Setup ✓
- Users ✓
- Description ✓
- Prerequisites 0
- Buyer Attachments 0
- Supplier Attachments ✓
- Questions 0
- Additional Item Fields
- Items 1
- **Suppliers** 1 1
- Review and Submit ⚠

Tools

Suppliers

Event Actions | History | ?

Event Suppliers (1) | Add Suppliers to Event | Add Suppliers From Group

1 Event Suppliers

Supplier Name	Doing Business As	Sales and Corporate Contacts	Action
nano tech		(Corporate) forrest.benedict@adm.idaho.gov Add Contact	Remove

‹ Previous | Save Progress | Next ›

How to create a Solicitation for a Request

How to Manually Invite a Supplier

- You Can **Manually Invite Suppliers** (Vendors) who haven't registered in the system
- A link is sent to the Supplier who can than register and bid on the Solicitation
- Click on **Add Suppliers to Event** tab

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DOP B-52 for RFQ Event Title
RFQ201932

Type: **Request for Quote**
Event Status: **Draft**
Form Request: DOP B-52

Settings and Content

- Setup ✓
- Users ✓
- Description ✓
- Prerequisites 0
- Buyer Attachments 0
- Supplier Attachments ✓
- Questions 0
- Additional Item Fields
- Items 1
- **Suppliers** 1 0
- Review and Submit ✓

Tools

Suppliers

Event Actions | History | ?

2

Event Suppliers (0) | Add Suppliers to Event | Add Suppliers From Group

3

Manually Invite Suppliers

- Import
- Get Import Template
- Add Supplier to Event

Search Registered Suppliers

Supplier
Relationship: In Network
Supplier Contact
Zip Code — Within 5 Miles
Commodity Code – Edit
Do Not Use: Type to filter...

Clear | Search

‹ Previous | Save Progress | Next ›

How to create a Solicitation for a Request

- **Progress** should all be green, if not go back and correct any errors
- Click **Submit for Approval** to submit the Sourcing Event

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DOP B-52 for RFQ Event Title
RFQ201932

Type: **Request for Quote**
Event Status: **Draft**
Form Request: DOP B-52

Settings and Content

- Setup ✓
- Users ✓
- Description ✓
- Prerequisites 0
- Buyer Attachments 0
- Supplier Attachments ✓
- Questions 0
- Additional Item Fields
- Items 1
- Suppliers 1
- **Review and Submit** 1 ⚠

Tools

Review and Submit

Event Actions | History | ?

✓ All sections are complete. You may submit your event for approval.

Section	Progress	
Setup	✓	Required Fields Complete
Users	✓	Required Fields Complete
Description	✓	Required Fields Complete
Prerequisites	0	No Required Data
Buyer Attachments	0	No Required Data
Supplier Attachments	✓	No Required Data
Questions	0	No Required Data
Items	1	Required Data Provided
Suppliers	1	Required Data Provided

View Approval Steps

‹ Previous | Submit for Approval

How to create a Solicitation for a Request

Description
Prerequisites 3
Buyer Attachments 1
Supplier Attachments
Questions 4
Question 1
Questions 2
Additional Item Fields
Items 2
Suppliers 2
Review and Submit

Relationship: In Network
Supplier Contact:
Zip Code: Within 5 Miles
NGIP Code: – Edit
Do Not Use: Type to filter...

Clear Search

Tools 1

Internal Notes • **You can add internal notes or add attachments that the supplier won't see**

Exports and Imports • **Excel files for Questions, Items, and manually invited suppliers on an event. And Template downloads**

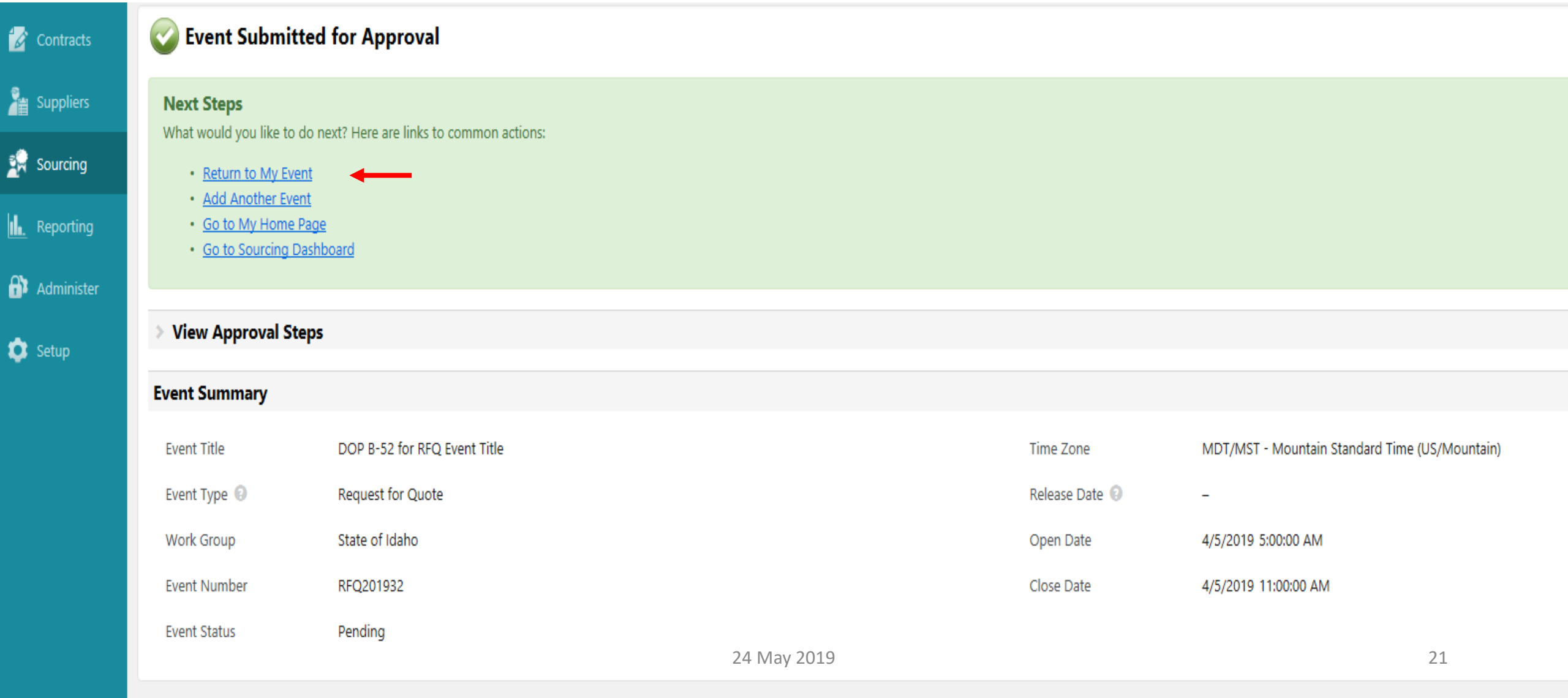
Q & A Board • **Used for Q&A with Suppliers-make sure all questions and answers are public**

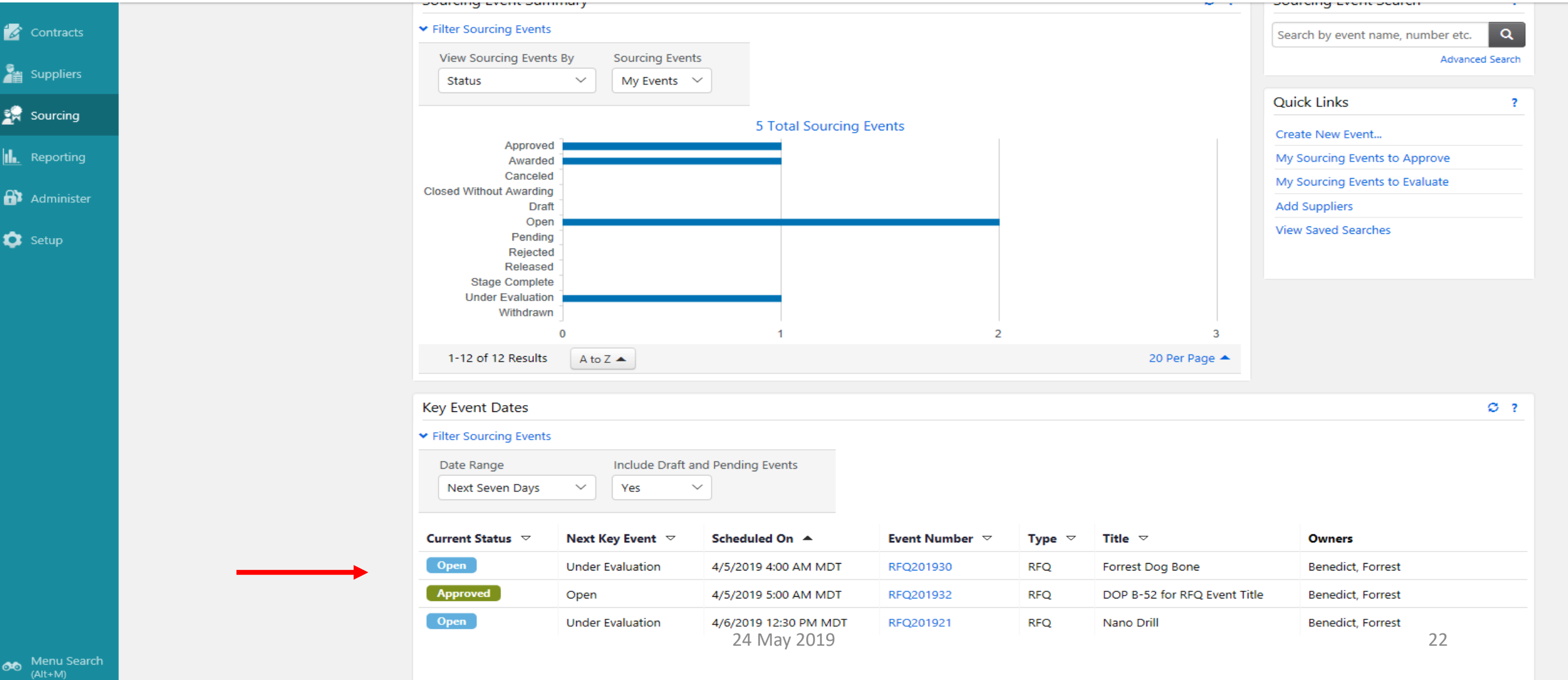
Approvals • **Can see the process flow for the event and evaluation**

Previous Save Progress Next

How to create a Solicitation for a Request

- Click on **Return to My Event**



How to create a Solicitation for a Request

- Once Sourcing Event has been approved you should see the current status of it on this page