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HOW TO REQUEST A SOURCING EVENT

After each step, click "Save Progress" before moving forward. The left side of the page will show green checkmarks indicating that the requested information is completed. If a question has a star, it is a required field. If the field is not populated, you will not be able to move forward. For more information, click on the Help Icon and click the question mark "?"

What is a Sourcing Event?

All University purchases over $250k must go out to bid per Procurement Policy. This process involves creating an 'event' so Units and Procurement can establish and follow the process from creation to awarding the bid.

Request Setup & Content

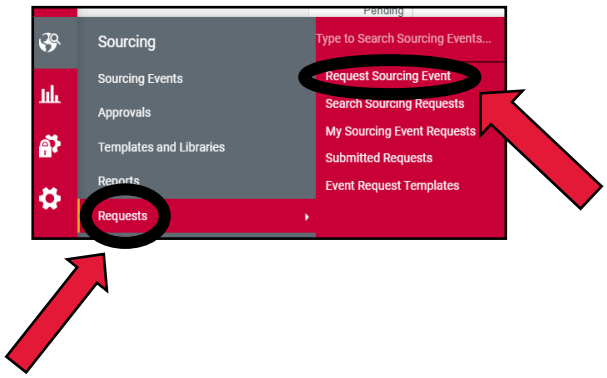
1. Log in to RU Marketplace

Log in to RU Marketplace. On left hand ribbon, look for **"Sourcing" (world icon).**



2. Requesting a Sourcing Event

Once in Sourcing, select "Requests" then select "Request Sourcing Event".

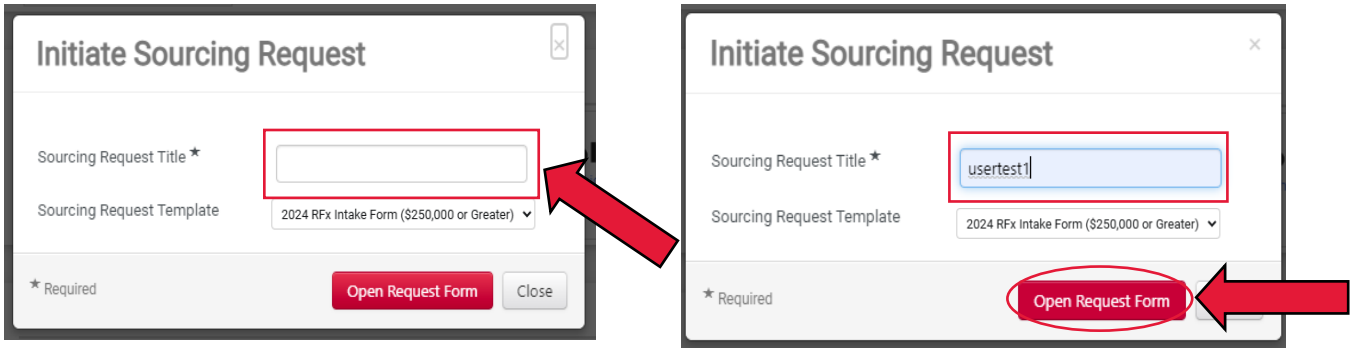


3a. Initiate Sourcing Request

Type the name of the Sourcing event you would like to request Ex. "Grass for Athletic Venues"

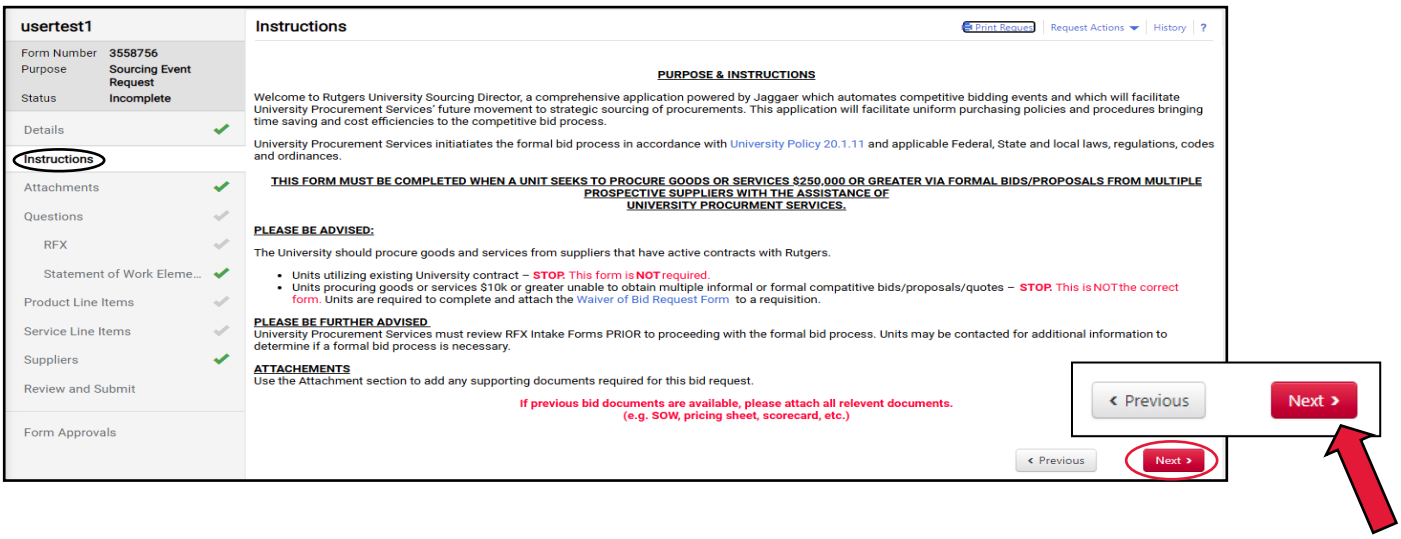
3b. Initiate Sourcing Request

Click "Open Request Form" this will open your Sourcing Event Request. You will begin on the Instructions Page.



4. Purpose & Instructions

Read Purpose & Instructions. Then click “Next”.



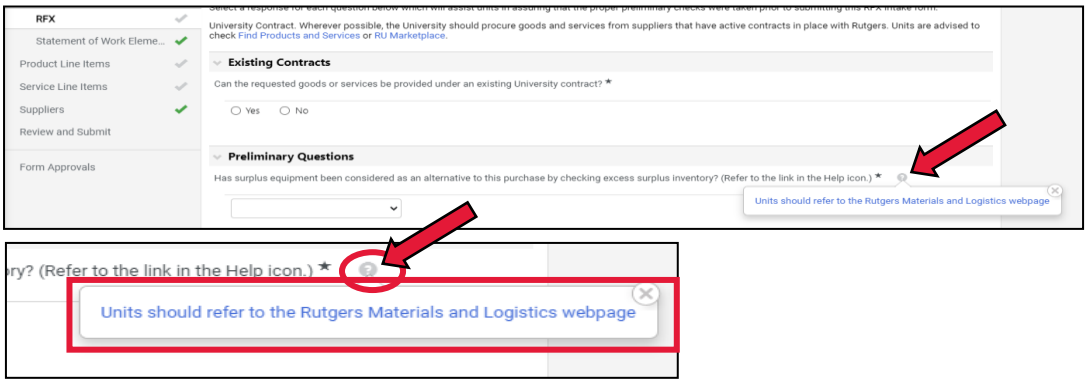
5. Attachments

Use the Attachment section to add any supporting documents. Supporting documents are not required however if, for example, you would like to provide further updates or explanations for this request, you may upload the attachments in this section. Click “Save Progress” then click “Next”.



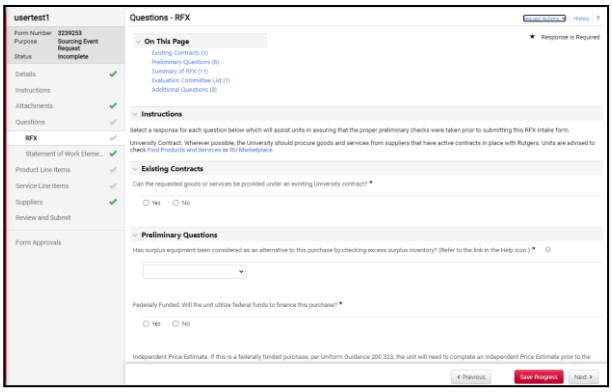
6a. Questions

If you are asked to “Refer to the link in the Help icon”, click the question mark "?"



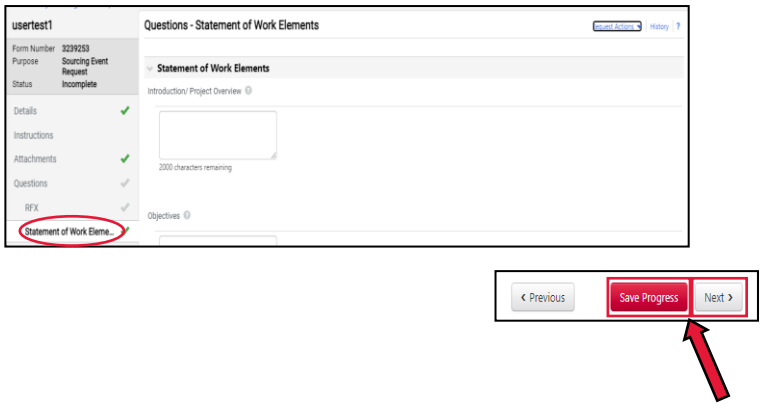
6b. Questions - RFx

Select a response for each question below that will assist University Procurement Services (UPS) in assuring that proper preliminary checks are completed prior to submitting this RFX Intake form. If a question has a star *, it is a required field. If the field is not populated, you will not be able to move forward in the process. After completing this page, click “Save Progress” then click “Next”.



6c. Questions - SOW

End-user has option of providing SOW and/or completing SOW elements.



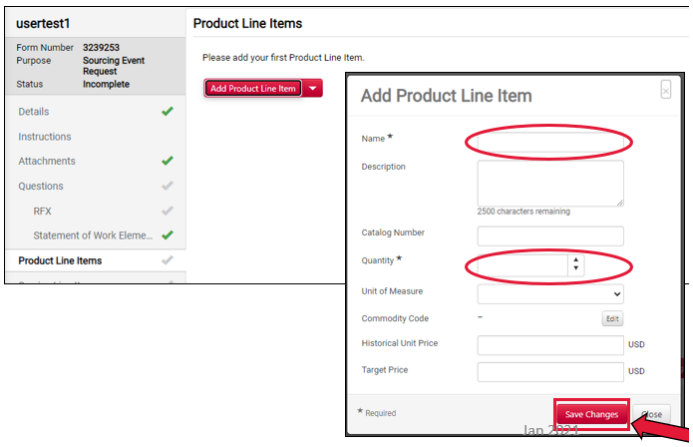
7a. Product Line Items & Service Line Item

If your request is a goods item click “Product Line Items”. If your request is a service click “Service Line Item”. You are required to complete either section.



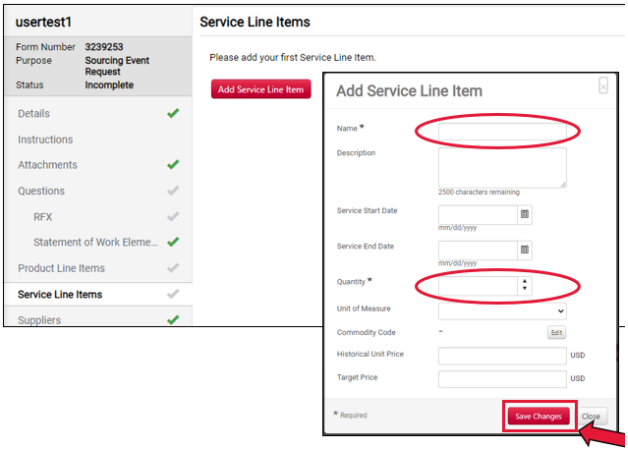
7b. Product Line Items

If you are requiring goods add a product name in the "Name" field. A description can be provided for further clarification. It is required to add a quantity, if unsure of the quantity, just choose "1". Click Save Changes, you will see your product line item (s) listed on the page. Click "Save Progress" click “Next”.



7c. Service Line Items

If you are requiring services add the service name in the "Name" field. A description can be provided for further clarification. It is required to add quantity, if unsure of the quantity, choose "1“, click “Save Changes”. you will see your product line item (s) listed on the page. Click "Save Progress" click “Next”.



8. Suppliers

The Sourcing team will reach out and request your desired suppliers. Feel free to suggest suppliers here, or leave blank. The Sourcing team will support identifying viable suppliers to invite.

9. Review and Submit

The **Review and Submit** section lists the progress for the required sections. If a section has not been completed, a notification will appear on this page under "**Action Needed on the Following**" advising of the action to take. Click the action needed link, it will return you to the page that needs attention. If you have saved your progress throughout the sections, all the information has been saved. When all fields are completed click “Submit”. When you click submit this form will be sent to the UPS team for review. A member of the Strategic Sourcing team will contact you once the review is completed.

