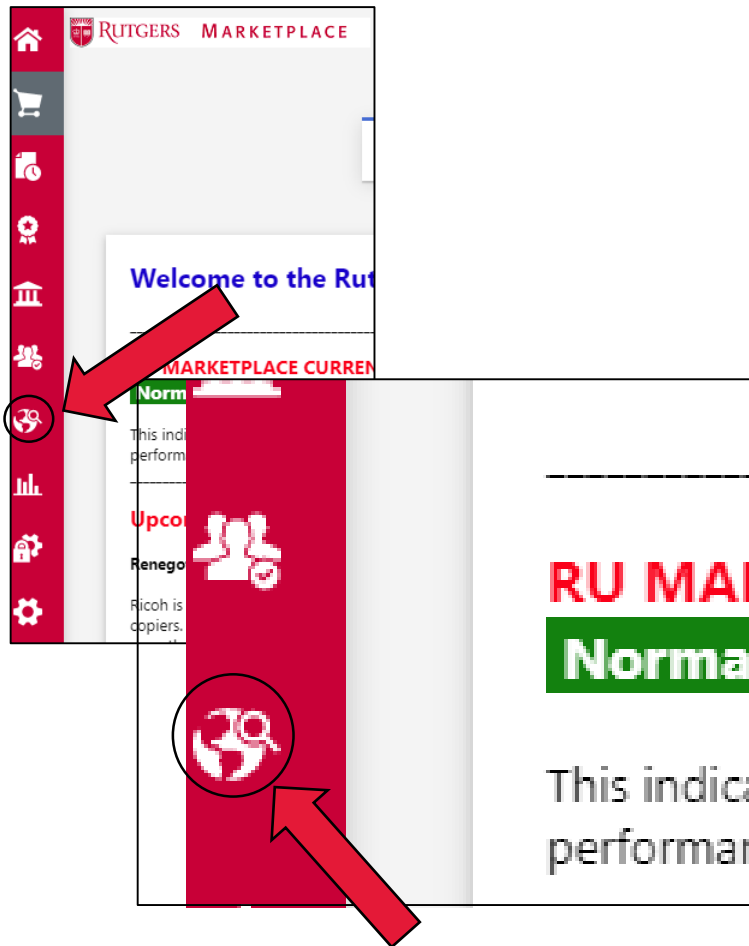




How to Request a Sourcing Event in Sourcing Director

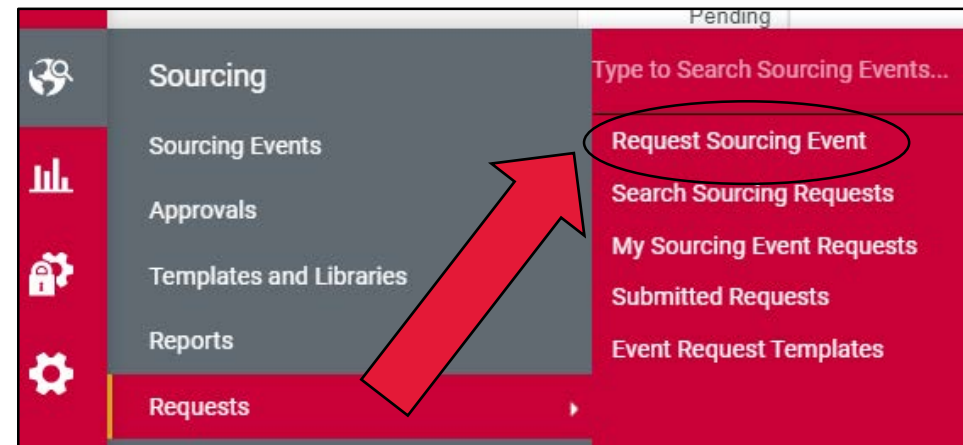
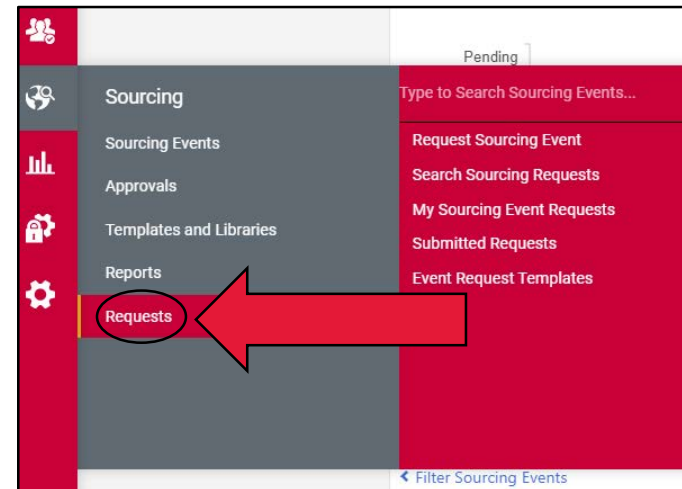
1. Requesting a Sourcing Event

Log into RU Market Place. On left hand ribbon, look for “Sourcing” (world icon).



2. Sourcing (world icon)

Once in Sourcing, select “Requests” then select “Request Sourcing Event”.

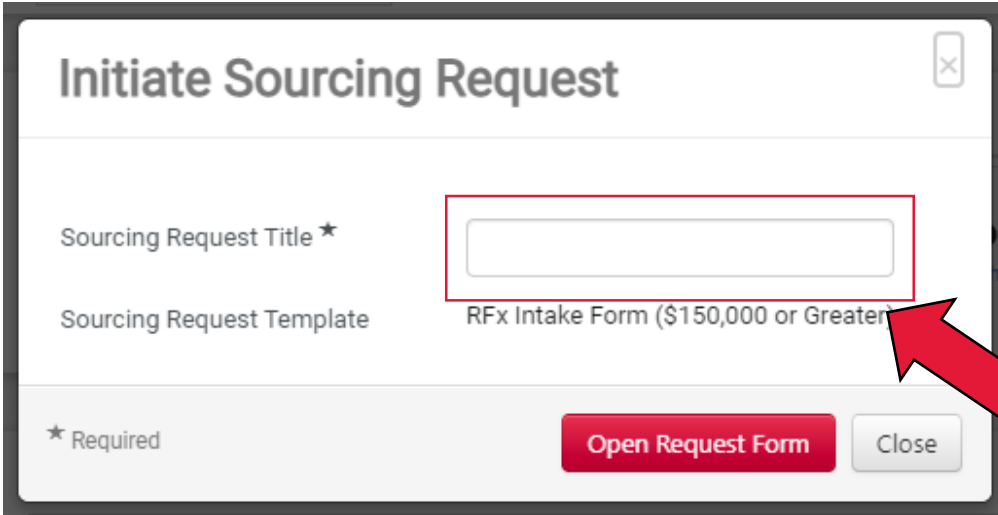




How to Request a Sourcing Event in Sourcing Director

3a. Initiate Sourcing Request

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



Initiate Sourcing Request

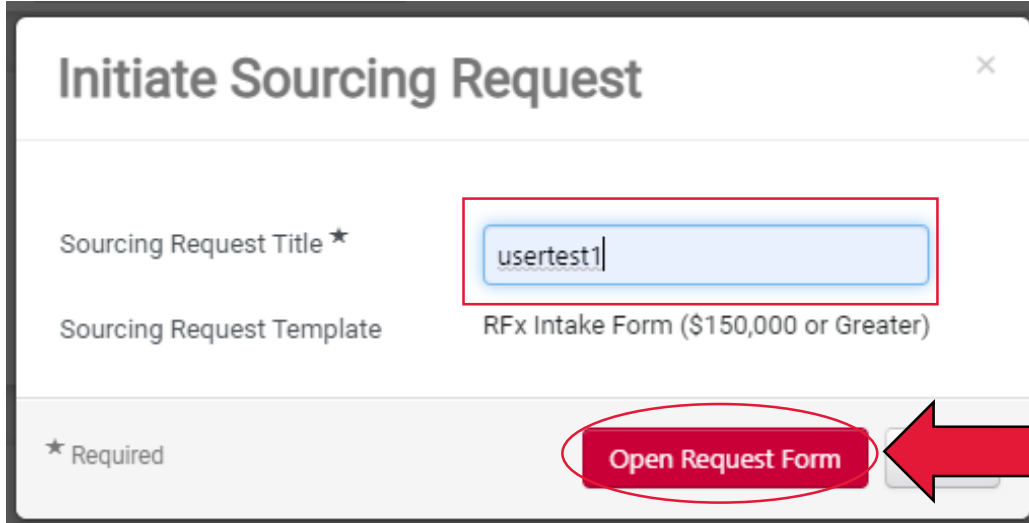
Sourcing Request Title ★

Sourcing Request Template Rfx Intake Form (\$150,000 or Greater)

★ Required **Open Request Form** Close

3b. Initiate Sourcing Request

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



Initiate Sourcing Request

Sourcing Request Title ★

Sourcing Request Template Rfx Intake Form (\$150,000 or Greater)

★ Required **Open Request Form** Close



How to Request a Sourcing Event in Sourcing Director: Request Setup & Content

4a. Sourcing Event Request

Read Purpose & Instructions. Then click "Next".

usertest1	Instructions	Print Request Request Actions ▼ History ?
Form Number: 3558756	PURPOSE & INSTRUCTIONS The purpose of the RFX Intake Form is to determine and confirm that the requesting unit has taken the necessary initial steps and provided the correct documentation to assist University Procurement Services with initiating the formal bid process in accordance with University Policy 20.1.11 and applicable Federal, State and local laws, regulations, codes and ordinances.	
Purpose: Sourcing Event Request		
Status: Incomplete		
Details ✓		
Instructions	<u>THIS FORM MUST BE COMPLETED WHEN A UNIT SEEKS TO PROCURE GOODS OR SERVICES \$150,000 OR GREATER VIA FORMAL BIDS/PROPOSALS FROM MULTIPLE PROSPECTIVE SUPPLIERS WITH THE ASSISTANCE OF UNIVERSITY PROCUREMENT SERVICES.</u>	
Attachments ✓	<u>PLEASE BE ADVISED:</u> Wherever possible, the University should procure goods and services from suppliers that have active contracts in place with Rutgers. If the unit is utilizing an existing University contract – STOP . This form is NOT required.	
Questions ✓		
RFX ✓	If the unit is seeking to procure goods or services \$10,000 or greater but cannot obtain multiple informal or formal bids/proposals/quotes due to restricted or limited competition – STOP . This is NOT the correct form. The Waiver of Bid Request Form needs to be completed.	
Statement of Work Eleme... ✓	<u>PLEASE BE FURTHER ADVISED:</u> That University Procurement Services must review this RFX Intake Form PRIOR to proceeding with the formal bid process and may require additional information and/or may determine that the formal bid process is not necessary.	
Product Line Items ✓	<u>ATTACHMENTS</u> Use the Attachment section to add any supporting documents required for this bid request.	
Service Line Items ✓		
Suppliers ✓		
Review and Submit		
Form Approvals		

< Previous **Next >**

< Previous **Next >**





How to Request a Sourcing Event in Sourcing Director: Request Setup & Content

4b. 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”.

usertest1	Attachments request Actions History ?
Form Number 3239253	<i>Please add your attachments below.</i>
Purpose Sourcing Event Request	
Status Incomplete	Add Attachment
Details ✓	
Instructions	
Attachments ✓	
Questions ✓	
RFX ✓	
Statement of Work Eleme... ✓	
Product Line Items ✓	
Service Line Items ✓	
Suppliers ✓	
Review and Submit	
Form Approvals	

< Previous	Save Progress	Next >
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< Previous	Save Progress	Next >
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How to Request a Sourcing Event in Sourcing Director: Request Setup & Content

4c. Questions

The **Questions** section outlines the group of questions that are required to be completed after clicking “Next”.

usertest1		Questions Request Actions History ?	
Form Number	3239253	Overview	Progress
Purpose	Sourcing Event Request	RFX	<input type="checkbox"/> Incomplete
Status	Incomplete	Statement of Work Elements	<input checked="" type="checkbox"/> Required fields complete
Details	<input checked="" type="checkbox"/>		
Instructions			
Attachments	<input checked="" type="checkbox"/>		
Questions	<input checked="" type="checkbox"/>		
RFX	<input checked="" type="checkbox"/>		
Statement of Work Eleme...	<input checked="" type="checkbox"/>		
Product Line Items	<input checked="" type="checkbox"/>		
Service Line Items	<input checked="" type="checkbox"/>		
Suppliers	<input checked="" type="checkbox"/>		
Review and Submit			
Form Approvals			





How to Request a Sourcing Event in Sourcing Director: Request Setup & Content

Question - Help Icon

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

Select a response for each question below which will assist units in assuring that the proper preliminary checks were taken prior to submitting this RFX intake form.

RFX ✓	University Contract. Wherever possible, the University should procure goods and services from suppliers that have active contracts in place with Rutgers. Units are advised to check Find Products and Services or RU Marketplace .
Statement of Work Eleme... ✓	
Product Line Items ✓	
Service Line Items ✓	
Suppliers ✓	
Review and Submit	
Form Approvals	

Existing Contracts

Can the requested goods or services be provided under an existing University contract? *

Yes No

Preliminary Questions

Has surplus equipment been considered as an alternative to this purchase by checking excess surplus inventory? (Refer to the link in the Help icon.) *

Units should refer to the Rutgers Materials and Logistics webpage

ry? (Refer to the link in the Help icon.) *

Units should refer to the Rutgers Materials and Logistics webpage

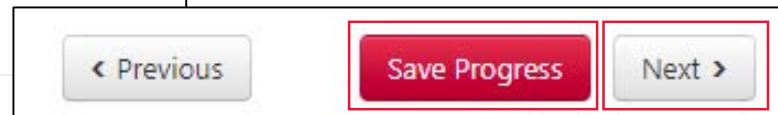


How to Request a Sourcing Event in Sourcing Director: Request Setup & Content

4d. Questions – RFX

Select a response for each question below which will assist University Procurement Services “UPS”, in assuring a proper preliminary checks is 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”.

usertest1	Questions - RFX
Form Number: 3239253 Purpose: Sourcing Event Request Status: Incomplete	Request Actions History ?
Details ✓	On This Page Existing Contracts (1) Preliminary Questions (6) Summary of RFX (11) Evaluation Committee List (1) Additional Questions (8)
Instructions	Instructions Select a response for each question below which will assist units in assuring that the proper preliminary checks were taken prior to submitting this RFX Intake form.
Attachments ✓	Existing Contracts University Contract. Wherever possible, the University should procure goods and services from suppliers that have active contracts in place with Rutgers. Units are advised to check Find Products and Services or RU Marketplace .
Questions ✓	Can the requested goods or services be provided under an existing University contract? ★ <input type="radio"/> Yes <input type="radio"/> No
RFX ✓	Preliminary Questions Has surplus equipment been considered as an alternative to this purchase by checking excess surplus inventory? (Refer to the link in the Help icon.) ★ <input type="text"/>
Statement of Work Eleme... ✓	Federally Funded: Will the unit utilize federal funds to finance this purchase? ★ <input type="radio"/> Yes <input type="radio"/> No
Product Line Items ✓	Independent Price Estimate. If this is a federally funded purchase, per Uniform Guidance 200.323, the unit will need to complete an Independent Price Estimate prior to the
Service Line Items ✓	
Suppliers ✓	
Review and Submit	
Form Approvals	





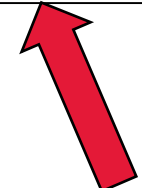
How to Request a Sourcing Event in Sourcing Director: Request Setup & Content

4e. Questions - Statement of Work Elements

“Save Progress” when completed then click “Next”.

usertest1	Questions - Statement of Work Elements	Request Actions History ?
Form Number 3239253	Statement of Work Elements	
Purpose Sourcing Event Request	Introduction/ Project Overview ?	
Status Incomplete	<div style="border: 1px solid gray; height: 60px; width: 100%;"></div>	
Details ✓	2000 characters remaining	
Instructions	Objectives ?	
Attachments ✓		
Questions ✓		
RFX ✓		
Statement of Work Eleme... ✓		

< Previous	Save Progress	Next >
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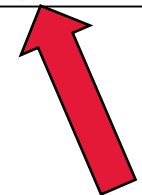
How to Request a Sourcing Event in Sourcing Director: Request Setup & Content

4f. 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.

usertest1	Product Line Items	Request Actions ▾ History ?
Form Number 3239253	Please add your first Product Line Item.	
Purpose Sourcing Event Request	Add Product Line Item ▾	
Status Incomplete		
Details ✓		
Instructions		
Attachments ✓		
Questions ✓		
RFX ✓		
Statement of Work Eleme... ✓		
Product Line Items ✓		

◀ Previous	Save Progress	Next ▶
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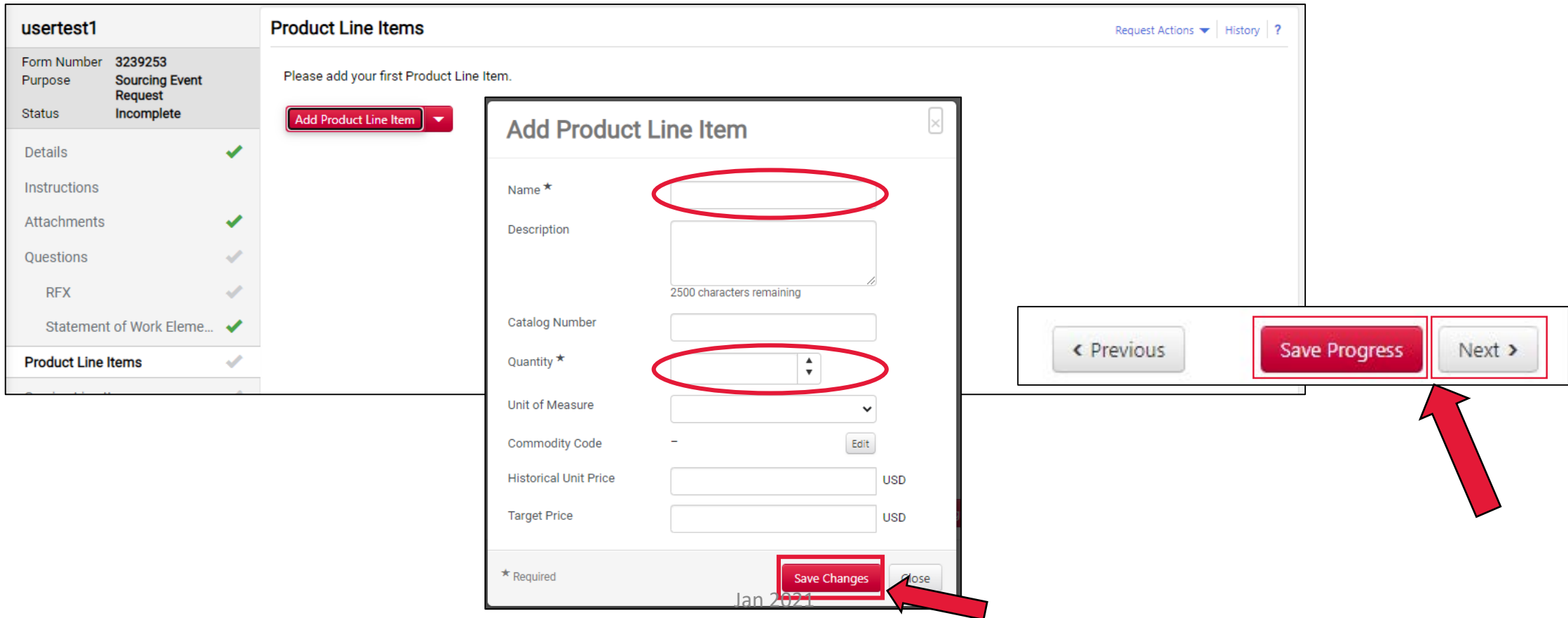




How to Request a Sourcing Event in Sourcing Director: Request Setup & Content

4f. Product Line Items

If you are requisitioning 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".



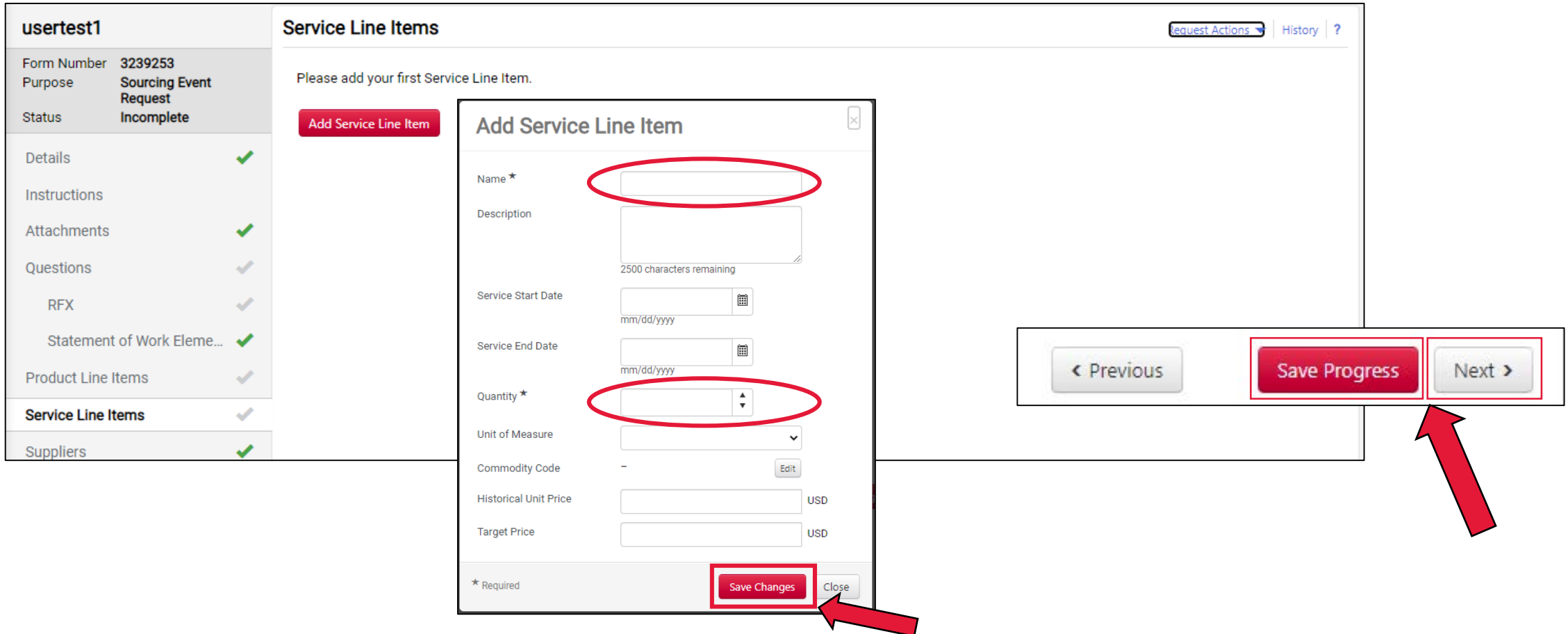
The screenshot displays the 'Product Line Items' section of a Sourcing Director request. On the left, a sidebar shows the request details for 'usertest1', including Form Number 3239253, Purpose Sourcing Event Request, and Status Incomplete. The main area contains a 'Product Line Items' section with a prompt to 'Please add your first Product Line Item.' and an 'Add Product Line Item' button. A modal window titled 'Add Product Line Item' is open, showing fields for Name, Description (with a 2500 character limit), Catalog Number, Quantity, Unit of Measure, Commodity Code, Historical Unit Price, and Target Price. Red circles highlight the 'Name' and 'Quantity' fields. At the bottom of the modal, a 'Save Changes' button is highlighted with a red box and an arrow. To the right of the modal, a navigation bar contains 'Previous', 'Save Progress', and 'Next' buttons, with 'Save Progress' highlighted in red and an arrow pointing to it.



How to create a Sourcing Event in Sourcing Director: Event Setup & Content

4g. Service Line Item

If you are requisition 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".



The screenshot displays the 'Service Line Items' section of a Sourcing Director interface. On the left, a sidebar shows the user 'usertest1' and the form details: Form Number 3239253, Purpose Sourcing Event Request, and Status Incomplete. The main area contains a 'Service Line Items' header with 'Request Actions' and 'History' links. Below the header, a message prompts the user to 'Please add your first Service Line Item.' A red 'Add Service Line Item' button is visible. An 'Add Service Line Item' modal is open, featuring the following fields: 'Name *' (circled in red), 'Description' (with a 2500 character limit), 'Service Start Date' and 'Service End Date' (both with mm/dd/yyyy format and calendar icons), 'Quantity *' (circled in red), 'Unit of Measure' (dropdown), 'Commodity Code' (with an 'Edit' button), 'Historical Unit Price' and 'Target Price' (both with USD currency). At the bottom of the modal, a red 'Save Changes' button and a 'Close' button are shown, with a red arrow pointing to 'Save Changes'. In the main form's navigation bar, a 'Save Progress' button is highlighted with a red box and a red arrow pointing to it, alongside 'Previous' and 'Next' buttons.



How to Request a Sourcing Event in Sourcing Director: Request Setup & Content

4h. Suppliers

If there is a known supplier you would like to invite to the Sourcing Event, complete this section. If the supplier is a current Marketplace supplier type the Supplier name in the "Supplier" field, in the relationship field choose In network and click Search. This will populate the additional information. If they are not a current supplier complete the Supplier fields, choose out of network, and click "Next". This is not a required page to complete the process.

usertest1

Form Number 3239253
Purpose Sourcing Event Request
Status Incomplete

Details ✓
Instructions
Attachments ✓
Questions ✓
RFX ✓
Statement of Work Eleme... ✓
Product Line Items ✓
Service Line Items ✓
Suppliers ✓
Review and Submit
Form Approvals

Suppliers

Request Actions | History ?

Form Suppliers | Add Suppliers to Form

Manually Add Suppliers

Search Registered Suppliers

Supplier

Relationship In Network

Supplier Contact

Zip Code Within 5 Miles

Commodity Code -

Clear

< Previous

Jan 2021



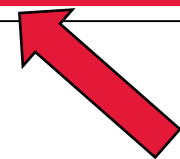
How to Request a Sourcing Event in Sourcing Director: Request Setup & Content

4i. Review and Submit

The **Review and Submit** section list 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.

usertest1		Review and Submit Request Actions History ?		
Form Number	3239253	Section	Progress	Action Needed on the Following
Purpose	Sourcing Event Request	Details	✓ Required Fields Complete	
Status	Incomplete	Attachments	✓ Required Fields Complete	
Details	✓	Questions	⚡ Incomplete	⚠ Please complete all required questions
Instructions		Product Line Items	⚡ Incomplete	⚠ Please add at least one item
Attachments	✓	Service Line Items	⚡ Incomplete	⚠ Please add at least one item
Questions	⚡	Suppliers	✓ Required Fields Complete	
RFX	⚡			
Statement of Work Eleme...	✓			
Product Line Items	⚡			
Service Line Items	⚡			
Suppliers	✓			
Review and Submit				
Form Approvals				

Questions	⚡ Incomplete	⚠ Please complete all required questions
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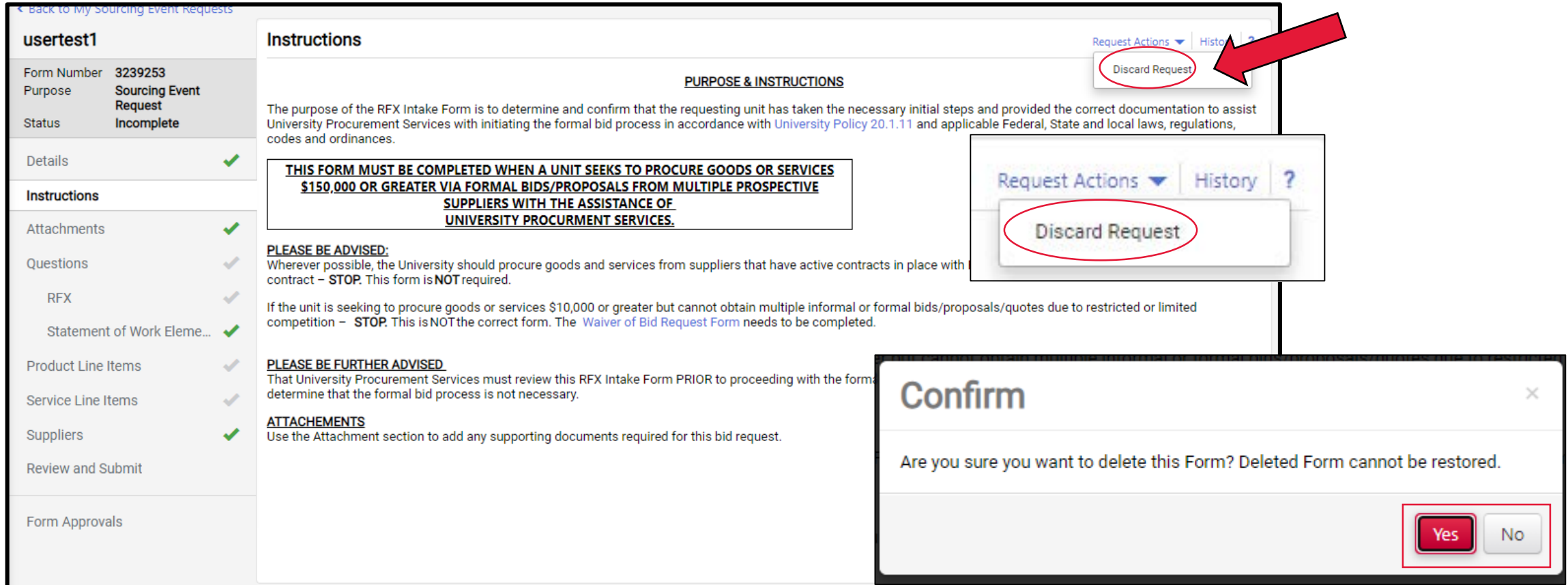




How to Request a Sourcing Event in Sourcing Director: Request Setup & Content

5. Cancel Request for sourcing Event

If at any point during the completion of the Sourcing Event request you would like to cancel, click the "Request Action" link on the top left, then click "Discard Request". The system will ask you to confirm your request. Once the "Discard a Request" has been confirmed, the form will be deleted and cannot be restored. All information will be lost.



The screenshot displays the Sourcing Director interface for a request form. On the left is a navigation sidebar for user 'usertest1' with sections: Details (checked), Instructions, Attachments (checked), Questions (checked), RFX (checked), Statement of Work Elements (checked), Product Line Items (checked), Service Line Items (checked), Suppliers (checked), Review and Submit, and Form Approvals. The main content area is titled 'Instructions' and contains the following text:

PURPOSE & INSTRUCTIONS

The purpose of the RFX Intake Form is to determine and confirm that the requesting unit has taken the necessary initial steps and provided the correct documentation to assist University Procurement Services with initiating the formal bid process in accordance with [University Policy 20.1.11](#) and applicable Federal, State and local laws, regulations, codes and ordinances.

THIS FORM MUST BE COMPLETED WHEN A UNIT SEEKS TO PROCURE GOODS OR SERVICES \$150,000 OR GREATER VIA FORMAL BIDS/PROPOSALS FROM MULTIPLE PROSPECTIVE SUPPLIERS WITH THE ASSISTANCE OF UNIVERSITY PROCURMENT SERVICES.

PLEASE BE ADVISED:
Wherever possible, the University should procure goods and services from suppliers that have active contracts in place with contract – **STOP**. This form is **NOT** required.

If the unit is seeking to procure goods or services \$10,000 or greater but cannot obtain multiple informal or formal bids/proposals/quotes due to restricted or limited competition – **STOP**. This is **NOT** the correct form. The [Waiver of Bid Request Form](#) needs to be completed.

PLEASE BE FURTHER ADVISED:
That University Procurement Services must review this RFX Intake Form **PRIOR** to proceeding with the formal bid process to determine that the formal bid process is not necessary.

ATTACHEMENTS
Use the Attachment section to add any supporting documents required for this bid request.

At the top right of the main content area, there is a 'Request Actions' dropdown menu with 'Discard Request' highlighted by a red circle and a red arrow pointing to it. Below this, a 'Confirm' dialog box is shown with the text: 'Are you sure you want to delete this Form? Deleted Form cannot be restored.' The dialog has 'Yes' and 'No' buttons at the bottom right, with 'Yes' highlighted by a red box.