



HOW TO VIEW AND BID ON A SOURCING EVENT

Intended Audience: Suppliers viewing and bidding on Sourcing Events.

This job aid lists the steps a supplier will take in order to view and bid on a Sourcing Event.

1. Click on the blue button, "Please click the link to view the sourcing event" in the email invitation about the Sourcing Event you'd like to view.

You've been invited to participate in "Request for proposal - Sourcing Event Example"

Dear Heather Juhascik,

You have been invited to participate in the following Request for proposal.

Event Number: RFX-2020-39

Event Title: Sourcing Event Example

Event Open Date: 4/15/2020 at 12:00 AM EDT

Event Close Date: 4/18/2020 at 4/18/2020 12:00 AM EDT

Issuing Company: University of Dayton

[Please click the link to view the sourcing event](#)

For first time users, when you click the link above you will be taken through a registration process. This is a process that will allow you to create an account and then gain access to view the event.

2. Log in to the Supplier Portal.

NOTE: If you have issues accessing the Supplier Portal or need to be invited, contact UD Purchasing at purchase@udayton.edu or 937-229-3868 ext. 2.

Please login to view the sourcing event.

ENGLISH ▾

Email

Password

[LOGIN](#)

[TROUBLE LOGGING IN?](#)

Please contact University of Dayton (Purchasing) at udsupplier@udayton.edu or +1 937-229-2641 for assistance.



NOTE: You may complete sections of the event at different times and access the event via this portal throughout the duration of the event cycle.



Summary Page

On the Summary Page, the start and end dates of the Sourcing Event are shown as is the Close Date for Question Submissions.

At the top of the page are quick links for the Event Schedule and Questions and Answers for this Event.

Sourcing Event Example
RFX-2020-39

Summary

Intent to Bid Not Set
- You must set your Intent to Bid to "Yes" to respond to this event.

[Yes, I Intend to Bid](#) [No Bid](#)

Event Title	Sourcing Event Example	Time Zone	EDT/EST - Eastern Standard Time (US/Eastern)
Event Type	Request for proposal	Event Open Date	4/15/2020 12:00 AM EDT
Event Number	RFX-2020-39	Event Close Date	4/18/2020 12:00 AM EDT
Stage Title	-	Question Submission Close Date	4/18/2020 12:00 AM EDT

Response Status: Not Started
Intent To Bid: Not Set ✓
Bid Total: 0.00 USD

Summary

- Prerequisites ✓
- Buyer Attachments ✓

Scroll further down on the Summary Page to view Sourcing Event Contact and a Description of the event which will provide further directions. You can view some of the event prior to setting your intention to bid but each page will ask until selected. To bid on the event, click "yes, I intend to bid."

[Yes, I Intend to Bid](#) [No Bid](#)

If you do not want to bid, click No Bid.

Prerequisites Page

Certify review and agreement to the prerequisites.

Sourcing Event Example
RFX-2020-39

Prerequisites

Please review and agree to the prerequisites listed below.

Event Details

Response Status: Not Started
Intent To Bid: Yes ✓
Bid Total: 0.00 USD

Summary

- Prerequisites ✓
- Buyer Attachments ✓
- Supplier Attachments ✓

Prerequisites

In order to submit your bid, review and agree to UD's Procurement and Supplier Standards.

[UD Procurement and Supplier Standards](#)

I certify that I have read and agree to the terms above.

Review UD's Mission, Vision and Policies

[UD About, Mission, Vision and University Policies](#)

I certify that I have reviewed this information.

Once all prerequisites are complete, click Save Progress or Next to advance screens.

[Save Progress](#) [Next >](#)

NOTE: The functionality throughout this portal is the same. "Next" will save and advance you to the next section. "Save Progress" will save but keep you on your current page.



Buyer Attachments Page

Pay special attention to this page as it'll have documents available for download with more information about the process of submitting your bid for this Sourcing Event.

Buyer Attachments

Event Actions ▾

Please see the attachments below for additional information about this event. There is important information here, so do not miss it!

Attachment

↓ RFP Template (DRAFT)

↓ Non-Collusion Declaration

↓ Contractors Minimum Insurance Requirements

↓ Professional Services Off Campus Insurance Requirements

↓ UD Professional Services Insurance Requirements

↓ UD Vendor Cyber Insurance Requirements Off Campus

Supplier Attachments Page

If directed to include attachments via this page, simply chose “Add New Attachment” each time you intend to upload a document for review.

Note: There may also be future questions that request uploaded documents as part of the question response.

Supplier Attachments

Please upload any additional files that are relevant to this bid response.

Please add your attachments below.

Add New Attachment



Questions Page(s)

Questions are used in order to compare bids across different suppliers. There may be one or several pages and these may include groups and sub-groups of questions.

NOTE: On the Overview page, there is a green checkmark for Supplier Questions indicating that all “Required fields complete” vs. Incomplete with no checkmark. It doesn’t necessarily tell you that all questions have been answered (i.e. an optional question).

Questions

Please review and respond to the questions below. You may save progress at any time.

Import Options Export Questions

Overview	Progress
Supplier Questions	✔ Required fields complete
References	○ Incomplete

To review and answer event questions, click Next.



In this example, Page 1 of Questions is “Supplier Questions” which is broken out into Group 1 with sections 1, 2 and 3.

Supplier Questions

This event will close on 4/23/2020 12:00 AM EDT. \

On This Page

- 1.1: Experience (6)
- 1.2: Technology (4)
- 1.3: Customer Service (6)

In this example, Page 2 of Questions is “References” which has a single question requesting an upload of customer references.

References

Event Actions History

Import Options Export Questions

Group 2.1

2.1.1

Upload a file with three customer references preferably in Ohio, for whom you have furnished goods and services similar in size and scope. Provide a brief description of the goods and services of similar size and scope that were provided. See attached file for information to be provided. *

Customer References

No File Attached Upload



Question Page(s) – Export & Import

There is an option to “Export Questions” to an Excel file. Without changing the format and simply answering the questions within the file (vs. the event portal), responses can be imported back into the portal.

This might be helpful if you need to circulate questions around to other members of your team.

Reference “Get Import Instructions” from the Import Options dropdown menu to learn how to use this feature.

Questions

Please review and respond to the questions below. You may save progress at any time.

Import Options ▾ **Export Questions**

- Import Responses
- Download Questions
- Get Import Instructions**

Progress

- ✓ Required fields complete
- ✓ Required fields complete

References

Items Page(s) – Product and Service Line Items

Items are set up similar to Questions, possibly in pages, groups, etc. You can respond within the portal or export and import line items.

Reference “Get Import Instructions” from the Import Options dropdown menu to learn how to use this feature.

Items Event Actions ▾ History ?

Please provide the price per unit and an estimated delivery date. The total price will be calculated when progress is saved. Additional information can be expressed to the buyer in the comments for each item.

Import Options ▾ **Export Items**

- Import Responses
- Download Items
- Get Import Instructions

Service Line Items (1)

Expand All Fields Collapse All Fields

Group P1 (1 - 1 of 1 items)

#	Item Name, Description, Etc	Brand	Qty	UOM	Requested Delivery	Unit Price (USD)	Total Price (USD)	Estimated Delivery	
P1.1	Total Cost of All Products in Bid View Details	-	1	Each	-	9,000.00	9,000.00	<input type="text" value="mm/dd/yyyy"/>	Respond to Item

★ Required [Previous](#) [Save Progress](#) [Next](#) >

As product and/or service line items are added, the total for each page will tally at the bottom of the Items page. “Save Progress” after entering each line item.

Total for Product Items	9,000.00 USD
Total for Service Items	6,500.00 USD
Grand Total for Bid	15,500.00 USD



Review & Submit Page

On this page, all required fields need to be complete as noted by a green checkmark. Suppliers should review optional fields and complete as appropriate.

The menu on the left side will show the following warning icon prior to "Submit Response" being clicked for the sourcing event.



The following warning will be given in the Review & Submit section if all required fields are not resolved. This disables "Submit Response".

All sections with required fields must be complete before you can submit your bid.

Section	Progress
Summary	✔ No Required fields
Prerequisites	✔ Required fields complete
Buyer Attachments	✔ No Required fields
Supplier Attachments	✔ No Required fields
Questions	⚪ Incomplete
Supplier Questions	✔ Required fields complete
References	⚪ Incomplete
Items	✔ Required fields complete

Review & Submit

Event Actions | History

Please review and submit your response after all errors have been cleared. You will still be able to come back to the event and edit your response until the event is closed.

All sections are now complete, and you may submit your bid below.

Section	Progress
Summary	✔ No Required fields
Prerequisites	✔ Required fields complete
Buyer Attachments	✔ No Required fields
Supplier Attachments	✔ No Required fields
Questions	✔ Required fields complete
Supplier Questions	✔ Required fields complete
References	✔ Required fields complete
Items	✔ Required fields complete

Certification

I certify that the statements and information in this response are true and correct to the best of my knowledge and belief.

Once Section review is complete and the Certification box is checked click Submit Response.



The following screen will show when the response is submitted successfully and allows access back to the Event Summary.

✔ Response Submitted

Next Steps

You have submitted a bid of 15,500.00 USD. You have until 4/23/2020 12:00 AM EDT to withdraw or change your bid.

- [Return to Home Page](#)
- [Event Summary](#)



Making Changes to a Submitted Sourcing Event

If the event is still open, Suppliers can make changes to their response, re-certify responses and resubmit.

Suppliers can also “Withdraw Bid” before it closes. After an event closes, neither of these options is available.

Summary Event Actions ▾ | History | ?

This event will close on 4/23/2020 12:00 AM EDT. You may withdraw your response until the event is closed. Withdraw Bid

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Event Number	RFX-2020-39	Event Close Date	4/23/2020 12:00 AM EDT
Stage Title	-	Question Submission Close Date	4/23/2020 12:00 AM EDT

Q&A Board

To ask questions about the Sourcing Event, use the Q&A board. Access under “Review & Submit” on the left side menu

Q & A Board

Or, use this quick link on the top right hand corner of the event.

[Questions & Answers for this Event](#)

Use the Ask a Question button to pose a question about the event to the Buyer. Return to the Q&A board to manage questions and answers throughout the event.

[Ask a Question](#)

Need a Human?

Contact UD Purchasing at
purchase@udayton.edu
or 937-229-3868 ext. 2.