



# 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 takes in order to view and bid on a Sourcing Event.

1. Click on [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 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. Create a new log in if this is the first time logging in to the portal.

**NOTE:** If you have issues accessing the Supplier Portal, contact UD Purchasing at [udsupplier@udayton.edu](mailto:udsupplier@udayton.edu) or 937-229-2641.



**Please login to view the sourcing event.**

ENGLISH ▾

hlambro@gmail.com

Email

.....

Password

LOGIN

[TROUBLE LOGGING IN?](#)

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

POWERED BY  
**JAGGAER**

**NOTE:** You can complete sections of the event at different times and access the event via this portal until the Event Close Date.



## Summary Section

Within the Summary Section, the Event Open Date and Event Close Date of the Sourcing Event are shown as is the Question Submissions Close Date. Questions can only be submitted via the portal until the Question Submissions Close Date.

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

Scroll further down within the Summary Section to view Sourcing Event Contact information and a Description of the event which will provide further directions on how to submit your response. You can view some of the event prior to setting your intention to bid but each section will show the banner with “Yes, I Intend to Bid” or “No Bid” until selected.

To bid on the event, click

**Yes, I Intend to Bid**

If you do not want to bid, click **No Bid** and leave the portal (you won’t be able to submit a response as choosing “No Bid” is the recorded response).

**NOTE:** Until the Event Close Date occurs, this can be edited by clicking the pen to the right of the Intent to Bid section on the left side menu under Event Title, Number and Details as shown here.



## Event Numbers

Event numbers start with “RFX” to represent all “Request for \_\_\_\_\_” event types, followed by UD’s fiscal year, followed by a number assigned to each unique sourcing event. Example: RFX-2020-11

## Event Types

Expect to see one of these Event Types as defined by the Buyer requesting a bid response.

- Request for Information (RFI)
- Request for Quote (RFQ)
- Request for Proposal (RFP)
- Sole-Source Purchase

**IMPORTANT:** Each Event Type has different sections within the event that require review. The following pages list all sections as available in the RFP Event Type. RFQ’s, RFI’s and Sole-Source Purchases may not have all these sections.

***Disregard any section in this guide that is not applicable to the event you are responding to.***

## Prerequisites Section

Certify review and agreement to the prerequisites.

Sourcing Event Example RFX-2020-39	Prerequisites
Event Details	Please review and agree to the prerequisites listed below.
Response Status: Not Started Intent To Bid: Yes Bid Total: 0.00 USD	In order to submit your bid, review and agree to UD's Procurement and Supplier Standards.
Summary	<a href="#">UD Procurement and Supplier Standards</a>
Prerequisites	<input type="checkbox"/> I certify that I have read and agree to the terms above.
Buyer Attachments	Review UD's Mission, Vision and Policies
Supplier Attachments	<a href="#">UD About, Mission, Vision and University Policies</a>
	<input type="checkbox"/> I certify that I have reviewed this information.

Once all prerequisites are complete, click

**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 in the same section.



## Buyer Attachments Section

Review this section for any Buyer Attachments which may include documents related to the bid or contain more information about submitting your response 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 Section

If directed by the Buyer to include attachments via this section, 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 Section

Questions are used to gather information from suppliers about the sourcing event and may be used to evaluate the event. There may be one or several pages of questions and these may include groups and sub-groups of questions.

**NOTE:** On the Questions 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
<a href="#">Supplier Questions</a>	✓ Required fields complete
<a href="#">References</a>	○ 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



## Questions Section – Export and 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 Section – 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)

Go to All groups ▾ 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 <a href="#">View Details</a>	–	1	Each	–	9,000.00	9,000.00	mm/dd/yyyy	<a href="#">Respond to Item</a>

★ 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	<b>9,000.00</b> USD
Total for Service Items	<b>6,500.00</b> USD
<b>Grand Total for Bid</b>	<b>15,500.00</b> USD



## Review & Submit Section

All required fields in this section 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

### Review & Submit



warning icon prior to “Submit Response” being clicked for the sourcing event.

A warning is given if any sections are incomplete. “Submit Response” is disabled until all sections show that Required Fields are complete.

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, suppliers may 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 are available and Suppliers would need to contact the Buyer directly

### 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](#)

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	4/23/2020 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 the quick link on the top right hand corner of the event.

[! Questions & Answers for this Event](#)

[Ask a Question](#)

Use the [Ask a Question](#) link to pose a question about the event to the Buyer. Return to the Q&A board to manage questions and answers throughout the event.

## IMPORTANT:

Questions can only be submitted via the portal until the Question Submissions Close Date or the Event Close Date, whichever comes first. After that time, suppliers must contact the Buyer they are working with on a Sourcing Event.