Sourcing Event Guide

Updated June 1, 2010

Sourcing Process Overview

- A sourcing event is an online event associated with an RFX where suppliers are invited to place a bid on requirements or to respond to questions posed by a buyer. The sourcing event process represents an opportunity for a supplier to win business in a competitive bidding format. In addition, the sourcing event process can help to streamline the time required to earn new business for suppliers. The event process involves the following steps:

Sourcing Process Steps

1. Locate and Qualify Suppliers: Prior to the event, the buyer will locate suppliers that are able to supply a desired good or service.
2. Create Event: Prior to inviting suppliers, the buyer will set up and structure the sourcing event. Some events will involve competitive bidding, while others may not.
3. Invite Suppliers: Once the event has been created, the buyer will invite qualified suppliers to participate in the event.
4. Preview Period: During the preview period, if any, the suppliers can view the requirements for the sourcing event and can decide whether or not to place a bid.
5. Collect Bids: If the event includes competitive bidding, suppliers can place bids and respond to competitive pricing signals during the bid collection phase of the sourcing event. If there is no competitive bidding, supplier can submit responses to questions.
6. Award: Once the bid collection phase has ended, the buyer will review the bids and/or responses and may make an award decision.

Supplier Portal Activities

Supplier Portal Activities	
•Register to become part of the supply base	•Check on supplier registration status
•Change user contact information	•Change company contact information
•Provide updated information on supplier capabilities	•Submit business documents
•Download and review important documents	•View other important resources and information
•View policies and procedures	•Learn about important announces and updates
•Learn about the products and services that will be purchased	•View and respond to bidding opportunities
•Get help	•Provide feedback
•Communicate with buyers	•Place bids

Event Invitation Receipt

An invitation is an email message that is sent by a buyer to suppliers informing the supplier of the sourcing event and asking them to participate. If you know of a sourcing event, and you have not been invited to participate, then contact the buyer to request an invitation. Once you have received an invitation, you may do the following:

Invitation Response

1. Decide whether or not you would like to participate in the sourcing event. To make this determination, you may also wish to view the details of the sourcing event.
2. Once you receive the invitation, follow the link in the invitation email that was sent to you.
3. After you click on the link, you will need to log in using your username and password that was provided to you.
4. Once you are logged in, you will be able to view the details of the sourcing event to determine whether you would like to place a bid on the requirements or respond to a request. You are not required to place bids on an event if you decide to view the requirements of the sourcing event.
5. If you would like to decline the invitation, you do not need to do anything. Simply do not respond to the email. Most suppliers elect to at least view the requirements of the sourcing event.

Viewing Sourcing Events

Viewing a sourcing event is straightforward and the screens are easy to use. Sourcing events have multiple tabs. Each tab contains additional information. For events that do not include competitive bidding, only a subset of the available tabs will appear. These tabs will include information that will allow a supplier to submit responses to questions or requests for information. For events with competitive bidding, there will be seven tabs available. These tabs are as follows:

- Content Tab
- Rules Tab
- Items Tab
- Bids Tab
- My Bids Tab
- All Bids Tab
- Messages Tab

The next sections will describe these tabs in detail and will explain some of the information on these screens as well as actions that suppliers can take.

Supplier Portal Navigation

Navigation Area	Description
Left Login Tile	Form that can be used to login. There is also a place to register, check the registration status, or reset a forgotten password
Contact Tile	Current contact information for our suppliers and prospective suppliers
Welcome Tile	A message and welcomes new suppliers to the supplier portal.
Supplier Resources Tile	Links to important documents and information that contain information on how to conduct business with us
Product and Services Tile	A list of commodities, products, and services that we purchase.
How To Tile	Quick links to provide instructions for suppliers
Announcements Tile	Important announcements to our supply base
Links Tile	links to other useful information

Content Tab

The content tab is the first tab that appears for the sourcing event. For surveys and some RFIs, the content tab and the messages tab will be the only two tabs that are available. The content tab is designed to provide general information on the sourcing event along with questions that require a response from a supplier. These questions can be:

- Multiple Choice: Questions in this format will appear with a select box with several options.
- Short Answer: These questions will appear with a text box for the supplier to submit a response of several words.
- Detailed Answer: These types of questions will include a text box with room for the supplier to submit a more detailed response to the questions.
- Requirement Met: A requirement met question will contain two options that read requirement met or requirement not met. It is important to select one option.
- Agreement: Agreement types of questions will contain two response options of agree or not agree.

Other Content Tab Details

- In addition to question types, the content tab can contain:
  - links
  - Attachments
  - solicitation descriptions
  - other information
- Suppliers should review the content tab thoroughly before submitting responses to questions or placing a bid.
- Once you have answered the questions, on this screen, it is important to submit the responses to that they are available for the buyer to review at the end of the event.
- You may review the responses on the confirmation screen before final submission. You may also go back and change or edit your responses prior to the conclusion of the event.

Rules Tab

The rules tab is used exclusively for competitive bidding events. The rules tab is designed to provide suppliers with details on how the event is structured at a glance. The rules tab is divided into three sections:

- Time
- Price and Quantity
- Rank

Rules Tab - Time Section

The time section contains information on the schedule and time settings for the event. Some important information that is included in this section include:

- Preview Begin Time: The preview begin time is when the sourcing event is available for review for suppliers. Usually, the preview period will be for a few days prior to the start of competitive bidding.
- Preview End Time: This described when the preview period is over and competitive bidding begins.
- Bidding Begin Time: This time is almost always the same as the preview end time and is when the sourcing event is available for supplier to place bids.
- Bidding End Time: The time after which no more bids can be placed (with the exception of overtimes).
- Award Time: The estimated award date for the sourcing event.
- Overtime Settings: These are settings like the length of any overtime periods, the events that must take place in order to trigger an overtime, and the number of overtime periods.

Items Tab

The items tab provides another screen that displays information about the sourcing event. Since sourcing events are commonly structured in Lots and Line Items, the items tab provides a visual summary of this structure. To aid bidding, products are grouped into like batches or requirements. There are three levels of batches that may be used: RFXs, Lots, and Line Items.

- RFX: An RFX can contain a large number of products. These products can be very different but may have in common a same delivery date or that they are needed for the same project.
- Lot: Lots are typically larger batches of like items that are grouped together for convenience.
- Line Items: Line items are the lowest level and suppliers typically bid on line items. A supplier may also bid on whole lot or an entire RFX. In some cases, a supplier may only be invited to view a single line item rather than larger groupings.

Items Tab

REGISTER | RESOURCES | HELP | FAQ | GO

Welcome to Demo Company Home > Suppliers > Portal > Your Account > Events [Logout]

RFQ for Computer Hardware

Content | Rules | **Items** | Bid | My Bids | All Bids | Messages

Items

Time Left: 19 hrs 55 min 3 sec

Level	ID	Name	Rules
RFQ	57	Currently viewing: **RFQ for Computer Hardware**	
Lot	59	**Lot 1**	
Line Item	62	**Dell PowerEdge R710 Rack Servers**	
		Price for Dell PowerEdge R710 Rack Servers *Current Bidding Price:* $2,780.00 *Quantity Desired:* 50 *Quantity UOM:* Not Specified *Bid Decrement:* $10.00 *Number of Bids:* 5 *Reserve Price:* Yes *Variable Quantity Bidding:* Not Allowed *Max Quantity Per Bid:* 50 *Start Price:* $3,200.00	
Line Item	65	**Mces PDUs for Vertical Rack Cabinets**	
		Price for Mces PDUs for Vertical Rack Cabinets *Current Bidding Price:* $86.00 *Quantity Desired:* 100 *Quantity UOM:* Not Specified *Bid Decrement:* $1.00 *Number of Bids:* 3 *Reserve Price:* Yes *Variable Quantity Bidding:* Not Allowed *Max Quantity Per Bid:* 100 *Start Price:* $100.00	

Legend

Icons: Time | Price | Rank | Prerequisites | Disclosure

Events | Bid List | Account | Glossary | Help | User Agreement

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Items Tab Continued

In addition to the structure of the event, the Items tab also contains detailed information for each line item. Summaries of the information that is available on the rules tab are also displayed on the items tab. However, the items tab may also contain rules that are specific to each line item. It is common for line items to have the same settings as the rest of the sourcing event or RFX. In addition, the Items tab may also contain rules about disclosure (ie who is winning, bids placed, etc) and about any prerequisites required for participation in the sourcing event.

Bid Tab

Like the Items tab, the bid tab displays the structure of the bidding event in the form of RFX, Lots, and Line Items. The bid tab also contains a summary of the rules and information for each line item. It is important to review this information during the course of the event. This information can provide information that will help formulate effective bidding strategies. You can access this information by clicking on the plus icons that are located in the name column for each line item. The bid tab also contains an arrow that tells the user where he or she is located in the navigation in relation to the overall structure of the sourcing event.

Bid Tab

The bid tab also contains a form in which suppliers can place bids. Depending on the rules of the event, suppliers can place a bid on all of the line items, or just one or two. To place a bid, do the following:

1. Enter the amount of your bid for each line item.
2. Enter your username and password on the bottom of the form.
3. Click the button at the bottom of the page to proceed to the confirmation form.
4. Review the bidding information that you are about to submit.
5. Click on the submit button.
6. If the bid was submitted successfully, you should receive a message confirming that it was submitted.