
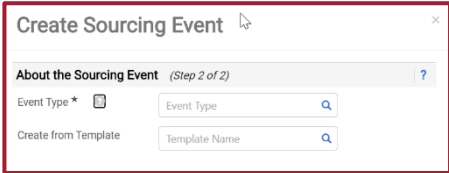


# Sourcing: Create an Event Quick Reference Guide (QRG)

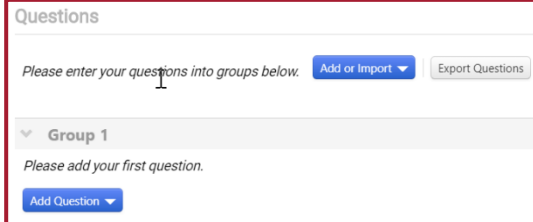
## Create an Event

This tip sheet will outline the process taken to create an event. You must be a Sourcing Specialist to create an event.

**Please Note:** If you are not listed as a Sourcing Specialist, you will see a message upon selecting to Create New Event, indicating you must contact your Site Administrator.

1. Select the **Sourcing** icon  from the left Menu Bar on the Buy-to-Pay Homepage. Then, select **Sourcing Events** and **Create New Event**....
  2. The **Create Sourcing Event** window opens. Enter an **Event Title** such as "RFI for Procurement of Safety Cameras."
  3. Select a **work group** (your TUB). You may search for work groups by clicking the **Search** icon.
  4. Click **Next** and then select an **Event Type**. You may also select a **Template** if you would like to use one to create the sourcing event.
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5. Click the **Create Sourcing Event** button. Enter a **Stage Title**, if applicable (Some events have multiple stages). Enter the **Estimated Value** of the event, if applicable.
  6. All **Bid and Evaluation** options are turned off initially. Select your options, if any.
  7. Select the **Yes** Radio Button in the **Display and Communication** section **IF** your Event is in excess of \$250,000 **AND** uses federal funds. Enter the explanation in the **Public Event Short Description** field (Appears if **Yes** is selected).
  8. Enter the **Release**, **Open**, and **Close** dates of the Event in the **Dates** section. Enter a **Q&A Submission Close** date if allowing additional time for supplier questions.

9. Click the **Save Progress** button if desired. Then, click **Next**.
10. You can add additional **Event Owners**, **Contacts**, and **Stakeholders** in the **Users** tab, as needed.  
**Note:** Event Owners can add notes during the evaluation within B2P. Stakeholders have read-only access. If the individual does not have access B2P you can export supplier responses to an Excel file and share the document with them offline.
9. Select the **Description** tab to enter the event description. You can copy an existing description from the library by clicking the **Copy from Library** button. Be sure to edit the placeholders accordingly if using the library.
10. Enter a description in the **Stage Description** section if the event has multiple stages and click **Next**.
13. Click the **Prerequisites** tab to add documents – a **Non-Disclosure Agreement (NDA)** for example. NDAs must be signed before the vendor can proceed.
14. Click the **Questions** tab to add questions for the suppliers to answer. You can enter them manually using the **Add Question** button or you can **Add or import a Question Page, Question Group, or individual questions** from the library. Questions can be edited to be optional or required.



15. Click the **Items** tab to add **Product Line** or **Service Line** items. Select each sub-tab as needed. Examples could be Material for a new classroom or Installation of materials for classroom, respectively. Be sure to add a description, quantity, etc.
16. Click **Suppliers** to add an existing supplier or contact. You can invite a supplier manually to bid prior to onboarding in the **Add Suppliers to Event** subtab. Onboarding can be completed if the event is awarded to this supplier.

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## Create an Event (Continued)

17. Click the **Submit for Approval** button in the **Review and Submit** tab. The event is approved automatically. It will release automatically on the **Release Date** (as set in step 8).
18. Additional details may be added. For example, the **Q & A Board** tab allows users to post questions and answers, while allowing suppliers to ask questions.

Once posted, the event owner will receive an email with the question. They can answer and share it to the public Q&A board.

## Post-Approval Available Actions:

Here is a list of available actions once the event is Approved:

- Extend an event (if it is open or released)
- Reopen a closed event
- Withdraw an event
- Archive events
- Create a cart or requisition from an awarded event

You can make changes to the event any time before the event closes. You also can delete the event while it is in draft status. Events will stay in draft status until released to suppliers.