

SOURCING QUICK START GUIDE

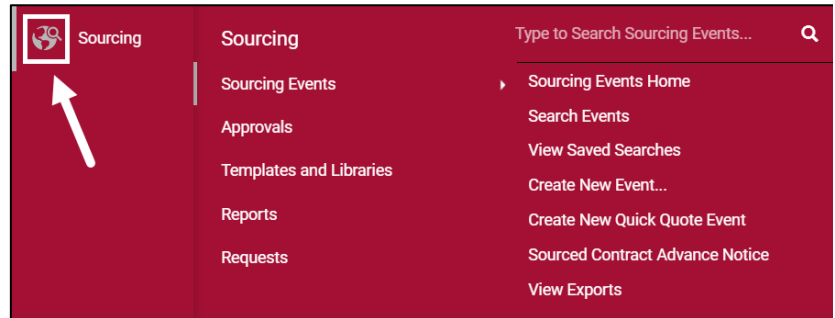


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SOURCING OVERVIEW

This Quick Start Guide introduces Sourcing. All Sourcing activities can be completed by clicking the **Sourcing** icon in the **Buy-to Pay Quick Menu Bar** (shown below). You may navigate to the **Sourcing Quick Reference Guides (QRGs)** by clicking their respective links in this guide.

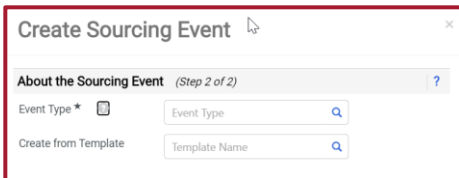
Sourcing Specialist is a role that can be assigned to an individual in B2P. Only Sourcing Specialists can create events or add Evaluators to their event. Other individuals with B2P access can be invoked as evaluators of a Sourcing event.



EVENT SETUP

The [Event Setup QRG](#) contains the basic information such as event name, type, associated work group, specific bid and public site settings, and dates. The Guide provides the definition of key terms, such as Work Groups, Auto Score, and Confidential Pricing. In addition, detailed steps show you how to edit and Event by its number.

CREATE AN EVENT



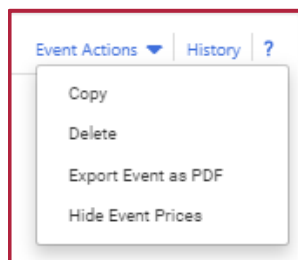
The [Create an Event QRG](#) provides each step in the event creation process in detail. The options that are present by default when creating an event may differ depending on the type of event and/or work group selected.

You must be an Event Manager or an Event Creator within a work group to create an event. You must have the Sourcing Specialist role to be added as an Event Creator.

COPY AN EVENT

You can use the [Copy an Event QRG](#) to save on the manual entry of many of the event specifics if an existing event has many of the characteristics needed for a new event. The Guide walks you through this process step by step.

DELETE OR WITHDRAW AN EVENT



An event may be **deleted** if it is:

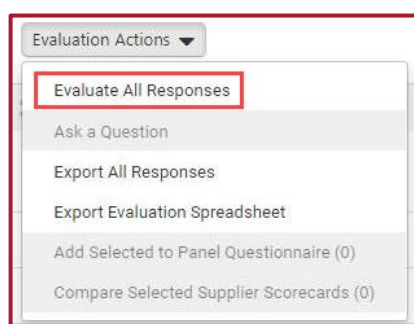
- in a **Draft** status,
- the user has the appropriate permission*, and
- is an Event Owner for the event.

An event may be **withdrawn** if it has been approved and is Opened or Released (visible to suppliers). Only an Event Owner can withdraw an event.

The [Delete or Withdraw an Event QRG](#) provides the steps for both processes.

* See the [Sourcing FAQ Website](#) for more information.

EVENT EVALUATION



An event enters Evaluation workflow once the Close date for the event passes (or it is closed early). The [Event Evaluation QRG](#) shows you how to evaluate supplier response. Once the event reaches the evaluation stage, you can initiate the panel questionnaire, review supplier responses, and award the RFx.

You may select and run different scenarios on supplier responses to an event and save those scenarios for review by others before a final decision is made.

AWARDING AN EVENT

Assign a bid – or multiple bids – to yourself for evaluation by using the [Award an Event QRG](#). You can award an event to a supplier – or multiple suppliers – once the evaluation process is completed.

The last step in evaluating supplier responses is to approve your award under the **Event Actions** drop-down list.

SEND AWARD NOTIFICATIONS

Award Notifications	
Type	Status
Awarded Supplier Email	Pending
Participating Supplier Email	Not Sent

Sourcing Specialists can configure the option to send award notifications (or participation notifications) to suppliers after an event has been awarded. See the [Send Award Notifications QRG](#) for more information.

QUICK REFERENCE GUIDE LINKS

Click the links to access the quick reference guides. Visit b2p.procurement.harvard.edu for additional resources.

Buy-to-Pay Sourcing Quick Reference Guides:

1. [Event Setup](#)
2. [Create an Event](#)
3. [Copy an Event](#)
4. [Delete or Withdraw an Event](#)
5. [Event Evaluation](#)
6. [Award an Event](#)
7. [Send Award Notifications](#)