

Creating an RFx

Webinar Wednesday Training Series



Agenda

- Learning Objectives
- Creating a Sourcing Event in CalUsource
 - Event Settings
 - Entering Basic Details
 - Managing Event Timelines
 - Adding Suppliers and Team Members
 - Adding Guidelines
 - Adding a Questionnaire/Price Sheet
 - Adding Attachments
 - Publishing
- Resources
- Q & A

Learning Objectives

- Understand the basics of creating a sourcing event in CalUsource
- Learn how to navigate the sourcing UI and how to interact with the various components of a sourcing event
- Learn how to access existing resources

Creating a Sourcing Event

Accessing CalUsource

1. Navigate to procurement.ucop.edu
2. Select Resources -> Platforms -> CalUsource
3. Select Access CalUsource -> I work for the UC
4. Log in using your Campus SSO

CalUsource Login

Please choose your role



I work for the UC
All UC staff should use this link to access CalUsource

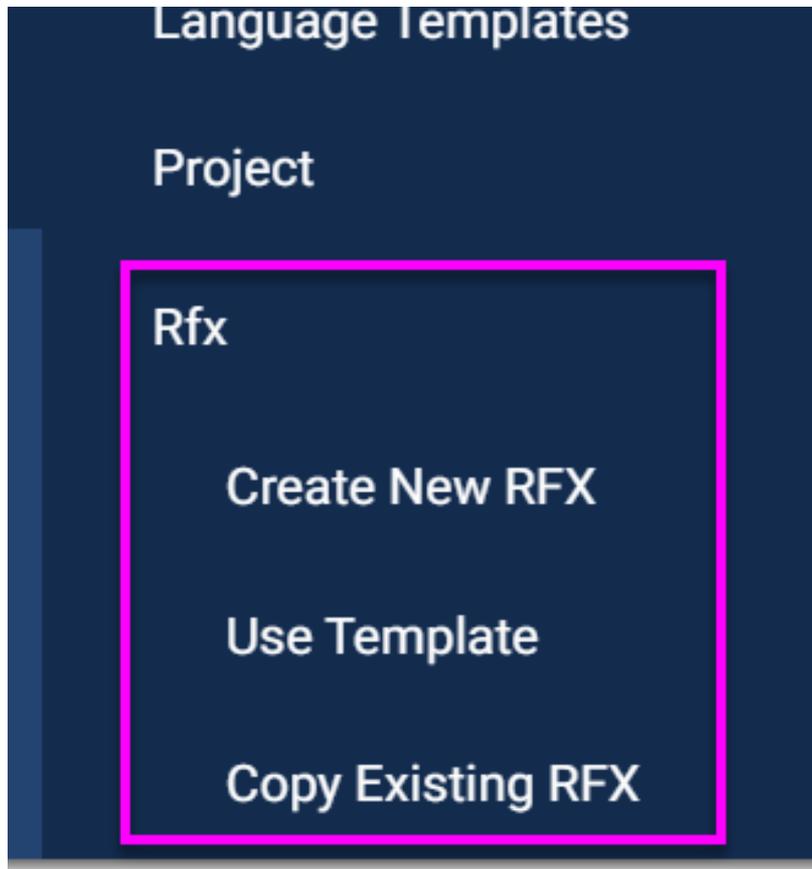


I am a UC Supplier
This link is for suppliers who have completed the registration process



I want to become a UC Supplier
Use this link if have not registered to become a UC supplier

Create an RFX



1. Select Create
 2. Select Rfx
 3. Select Create New RFX
- **NOTE:** You must have adequate user access to create an RFX. If you do not see this option in your profile and you should have the ability to create RFX's – please notify the help desk

Manage Event Settings



Settings

GENERAL

Public RFX [i](#)

2 Envelope Event [i](#)

Confidential event [i](#)

Sealed event [i](#)

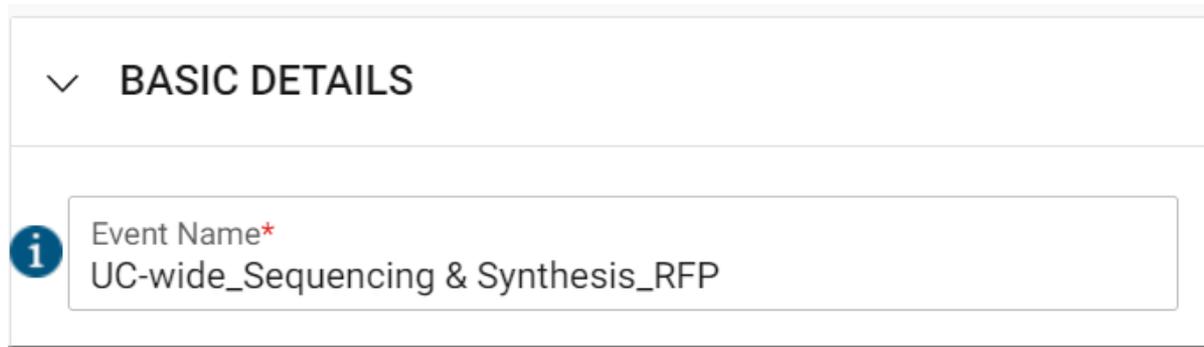
Training event [i](#)

Mask Buyer Name and Contact details on Supplier Side

- Use Settings to manage various components of the event, including:
 - How the event is classified
 - Which components of the event will be required, and if they will be evaluated
 - How suppliers will interact with the event

NOTE: These settings cannot be changed once an event is published

Editing Basic Details



✓ BASIC DETAILS

i Event Name*
UC-wide_Sequencing & Synthesis_RFP

- In the Basic Details section, you will define and categorize the event
- Think of it as a cover sheet for the event and add information pertinent to suppliers viewing/participating
- The Event Name should follow our standard naming convention: **Campus Acronym_Short Description_RFx Type**

Managing Event Timelines

EVENT TIMELINES (2)

Gantt View Edit

Time Zone: Pacific Standard Time (UTC-7:00)

Total Duration 23 Days 8 Hours	Event Created On 10/03/2023 3:33 PM	Event Timeline Ends 10/26/2023 11:59 PM
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Name	Start Date & Time	End Date & Time	Duration	Visible to Supplier
Response Timeline	10/11/2023 12:00 AM	10/18/2023 11:59 PM	7d 23h 59m	Yes
Evaluation Timeline	10/19/2023 12:00 AM	10/26/2023 11:59 PM	7d 23h 59m	No

- The system will pre-populate the Response and Evaluation Timeline
 - These drive status changes within the system
- Edit these to fit your event schedule
- Additional timelines may be added, but **WILL NOT** impact the system status changes

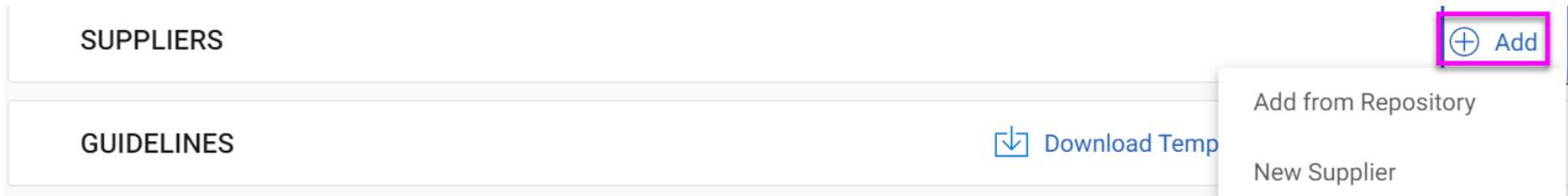
Adding Team Members

▼ TEAM MEMBERS (1)

Coauthors	Evaluators	Viewers	Total Members	
1	1	1	1	
<input type="checkbox"/>	Name	Supplier Contact	Viewer	Coauthor
<input type="checkbox"/>	Ivy Weirather(Author)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

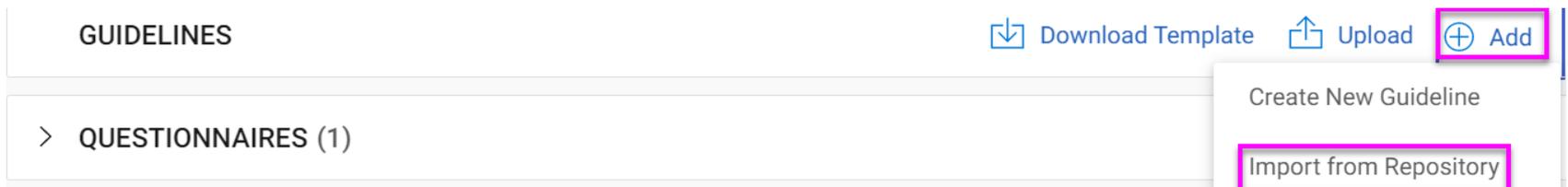
- Add all persons participating in the event, including collaborators and evaluators
- Assign roles by selecting the boxes next to the team member's name
- Assign/Limit documents that team members can edit/co-author and/or score

Adding Suppliers



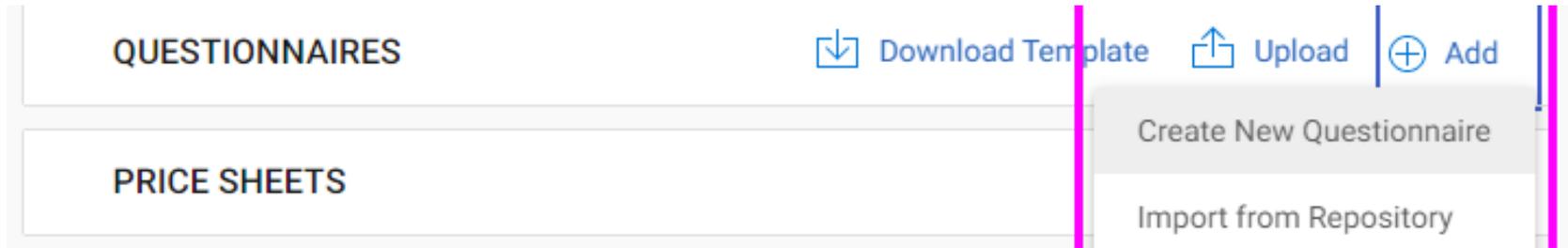
- Existing suppliers can be added via the repository
- New suppliers can be added by populating the New Supplier form within the RFX
- Suppliers will be invited to participate when the event is published
- We will do a deeper dive on Supplier Management during a subsequent webinar

Adding Guidelines



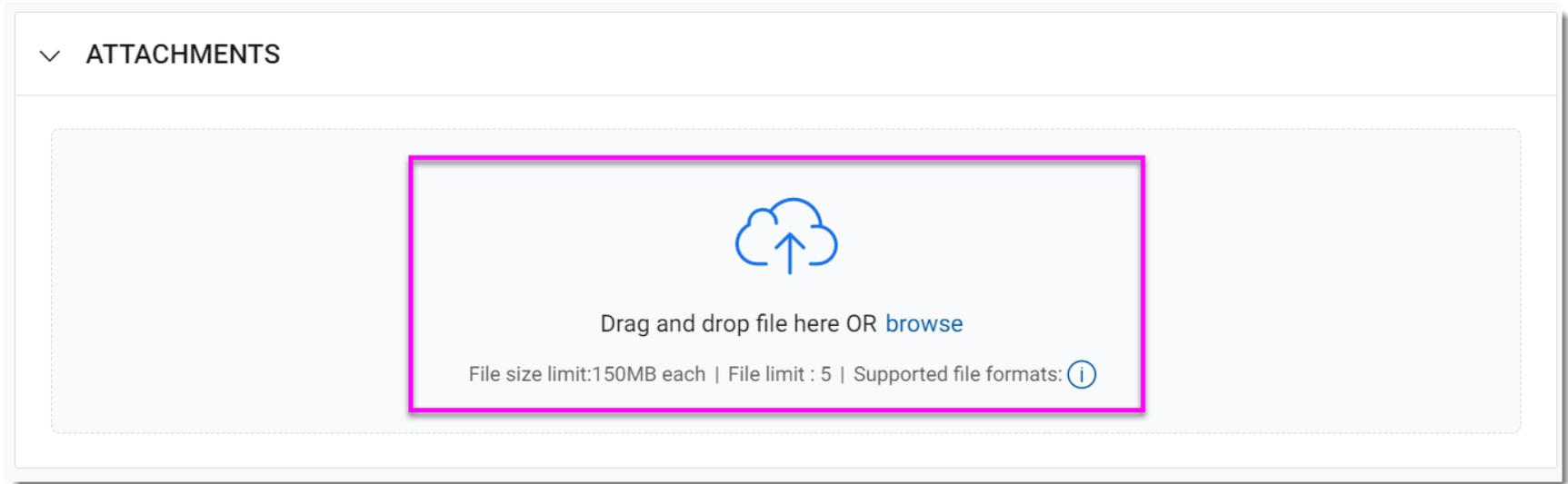
- Guidelines can be imported from the repository and edited to fit your event
- Guidelines can also be created from scratch
- You can specify that suppliers must acknowledge the guidelines prior to participating in the event

Adding Questionnaires/Price Sheets



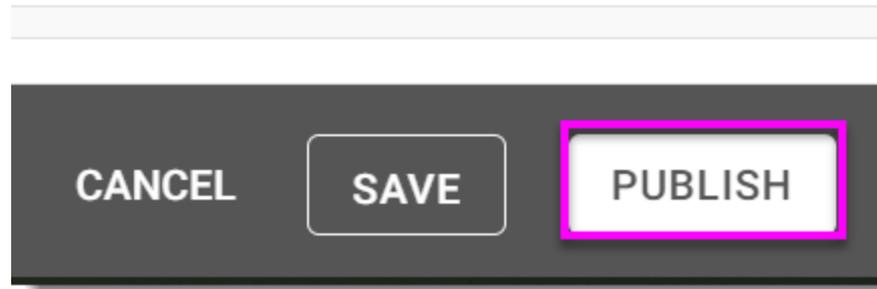
- Questionnaires/Price Sheets can be created from scratch or imported/edited from the repository
- Questionnaires/Price Sheets are not necessary for an event, but are very helpful for evaluating responsive suppliers
- We will dedicate a webinar to Questionnaires and Price Sheets if you're interested to learn more

Adding Attachments



- Attachments can aid team members and suppliers by providing additional context for the event
- Each attachments can either be visible or not visible to suppliers

Publishing an Event



- Once completed, publishing event will start the event timeline and will make the event visible to suppliers
- Many RFX settings cannot be changed once an event is published so ensure your event is accurate prior to publishing

Resources

Sourcing Quick Reference Guides

[Configuring Event Settings](#)

[Creating a New Event](#)

[Editing Basic Details](#)

[Editing, Adding Event Timelines](#)

[Adding Guidelines](#)

[Adding Existing Suppliers](#)

[Adding New Team Members](#)

[Creating a Price Sheet](#)

[Creating a Price Sheet from the Repository](#)

[Creating a Questionnaire](#)

[Adding Attachments to Events](#)

[Inviting a Supplier](#)

[Publishing Sourcing Events](#)

Need Additional Assistance?

- Attend our bi-weekly office hours, every other Wednesday
 - <https://procurement.ucop.edu/resources/benefit-bank/jwebinar-wednesdays-2024>
- Email us! support@ucprocure.zendesk.com

Questions?

