How to Request a Sourcing Event in Sourcing Director

2/15/2024
Log into UD Exchange.

Select the **Sourcing (Globe)** icon on the left navigation menu.
Select Requests > Request Sourcing Event
Enter the name of your sourcing event in the Sourcing Request Title field. Click **Open Request Form** to open your Sourcing Event Request.
Read and review the Instructions for completing the Sourcing Event Request form. Be sure to have your Scope of Work, Potential Supplier and Evaluation Committee lists ready to upload. Click Next.
The Questions page simply provides an Overview of the categories of questions you will be asked to answer. Click Next to proceed to the first section of questions.
Complete the Business Unit Request Data questions. Click on the **Question Mark** icon to see additional help text.
Questions marked with a Star require a response. If a required question is not answered, you will not be able to move forward.
You will be asked to answer some basic information about your sourcing event including estimated award amount, funding source and term of contract.

Once you have answered the questions, click **Next**. If needed, you can click **Save Progress** to return to the form at any time.
The Procurement Project Requirements page begins with some basic process questions.
In this example, the requested sourcing event is for a new website involving computer software.

All IT solutions must be submitted through the Technology Request process first.

Because that category has been selected, you will be prompted to answer some additional questions and enter your Technology Request Number.

If you have not yet submitted a Technology Request, click Save Progress to return to the form once you have your Technology Request Number.
Next you will be asked to upload a **Scope of Work** for your sourcing event.

If you need assistance developing your Scope of Work, a template has been provided.

If needed, you can click **Save Progress** to return to the form at any time.

Once all required questions have been completed, click **Next**.
On the Participant Information page:

- Upload your **Evaluation Committee** list using the template provided.
- Answer the question about suppliers for your sourcing event.
- If you already know some **Suppliers to be Invited**, upload the list using the template provided.

The Instructions for **Product Line Items and Suppliers** will guide you through the next two pages of the form. Click **Next**.
The Product Line Item page requires you to enter both the Name and Quantity. Enter the Name of your sourcing event and a Quantity of 1. Click Save Changes.
You will see that the required line has been created allowing you to click Next to proceed to the next page.
The Supplier page is *not* required to complete the form. The Procurement team will enter your potential suppliers for you. Click **Next**.
The Review and Submit page displays your progress for the required sections of the form. Any incomplete sections will be marked for you to complete. When all sections are completed, click **Submit**. The form will be routed for review and a member of the Procurement Team will contact you to discuss your sourcing request.
If, at any point during the completion of the Sourcing Event Request, you would like to cancel the request:
Click Request Actions
Select Discard Request

The system will then ask you to Confirm your request. Once you have clicked Yes to Confirm, the form will be deleted and cannot be restored.
Questions:
• procurement@udel.edu

Resources:
• Procurement Services Website