



How to Request a Sourcing Event in Sourcing Director

2/15/2024



Organization Message

Welcome to the University of Delaware Exchange **Test Site!**

The test site does not create live purchase orders or payments sent to suppliers. The integrations are set up to use the FITST PeopleSoft instance, which is not dynamically updated for production values of custom fields such as projects, work orders and speedtypes, or supplier active/inactive status. **The last refresh of FITST was completed on April 5, 2023.** Custom fields are current as of that date. Users hired after this date also may not be in the test site, so please send an email to [procurement@udel.edu](mailto:procurement@udel.edu) if a new hire requires access to the test site.

As you use this site for training and testing, you may see small differences from guides and the production site. The integration with catalog suppliers depends on their having a test site for integration; some suppliers (such as Amazon) do not have a test site and are not in this catalog. The test site is where the administrators test new solutions before moving to production and while building new guides. Please email [procurement@udel.edu](mailto:procurement@udel.edu) if you have specific questions; chances are we are working on it!

Action Items

MY ASSIGNED APPROVALS

Carts Assigned To Me

My Resources

My Resources

Product Release Library | [procurement@udel.edu](mailto:procurement@udel.edu)

Site Map

Quick Links

- UD Exchange How To Guides
- How Do I Buy \_\_\_\_ ???
- Commodity Code-Account Crosswalk
- Non-PO Payment Matrix
- Non-Catalog Item
- NEW Waiver of Bid Form
- Request Contract

My Draft Carts

Showing Results 1 - 2 of 2

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
3638241	Punchout test	Drafts Assigned To Me	10/30/2022	10,293.84 USD

Catalog & Forms Showcase (Under Development)

Procurement Forms

Non-PO Payment Request

Honorarium Payment Request

Subaward Request

NIIMBL Subaward Request

RFX Request (Option 2)

NEW Waiver of Bid Request

Office/Misc Supplies

Log into UD Exchange.

Select the **Sourcing (Globe)** icon on the left navigation menu.

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[Site Map](#)


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- [How Do I Buy \\_\\_\\_\\_\\_ ???](#)
- [Commodity Code-Account Crosswalk](#)
- [Non-PO Payment Matrix](#)
- [Non-Catalog Item](#)
- [NEW Waiver of Bid Form](#)
- [Request Contract](#)


Select Requests > Request Sourcing Event

Catalog & Forms Showcase (Under Development)


Procurement Forms




Non-PO Payment Request




Honorarium Payment Request




Subaward Request



NIIMBL Subaward Request



RFX Request (Option 2)



NEW Waiver of Bid Request

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- ☐ Request Contract

Catalog & Forms Showcase (Under Development)

Procurement Forms

Non-PO Payment Request

RFX Request (Option 2)

NSB Customer Setup

NEW Waiver of Bid Request

Office/Misc Supplies

Initiate Sourcing Request

Sourcing Request Title \*

New website for Athletics

Sourcing Request Template


Sourcing Event Request Form (SER)

\* Required

Open Request Form

Close

Enter the name of your sourcing event in the Sourcing Request Title field.  
Click **Open Request Form** to open your Sourcing Event Request.

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
 3762252	Cassidy Powerwashing	Drafts Assigned To Me	4/27/2023	0.00USD
3762248	Gel Pens	Drafts Assigned To Me	4/27/2023	61.08USD

< Back to My Sourcing Event Requests

New website for Athletics

Form Number	898645
Purpose	Sourcing Event Request
Status	Incomplete
Details	

Instructions

Questions
Business Unit Request Da...
Procurement Project Req...
Participant Information
Product Line Items
Suppliers
Review and Submit
Form Approvals

Instructions

Print Request Request Actions History ?

To request the initiation of a formal sourcing event, any UDX user can complete and submit the Sourcing Event Request (SER) form. For additional guidance on sourcing thresholds, please refer to the [Procurement policy](#).

An [illustrated help guide](#) is available for your reference.

To successfully complete this form, you will be prompted to provide and upload the following information:

- [Scope of Work](#) – Template and instructions provided.
- If you are interested in inviting specific suppliers to your event, please have a [list of potential suppliers](#) ready to upload.
- [List of Evaluation Committee Members](#) – Complete and upload.
- [For Technology \(Computer Hardware and Software Solutions\) related projects please have your Tech Request Number available.](#)
- For [Facilities](#) projects please be prepared to upload your University Estimate. To obtain an estimate contact: W. Frank Brady, Facilities Cost Estimator, (302) 463-7011, [wfrbrady@udel.edu](mailto:wfrbrady@udel.edu)

When asked to upload these items, we ask that you submit the provided templates in their original format.

If you are in the early planning stages and do not have all of the information required to complete the form, please answer the questions with as much detail as possible so that the Procurement Team can best assist you. Your [Campus Liaison](#) is also a resource to answer questions and provide assistance completing the form.

A member of the Procurement Team will contact the person you list as the Business Unit Single Point of Contact (SPOC) to review your project needs.

The timeframe for the procurement process (the date you submit your request to the date of contract execution) will vary depending on the complexity of the purchase.

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Next >

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**.



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TEST SITE

Requisitions

Search (Alt+Q)

0.00 USD

Logout

Sourcing

Requests

My Sourcing Event Requests

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New website for Athletics

Form Number856388

PurposeSourcing Event Request

StatusIncomplete

Details

Instructions

Questions

Business Unit Request Data

Procurement Project Requirements

Participant Information

Product Line Items

Suppliers

Review and Submit

Form Approvals

Questions

Print Request

Request Actions

History

Overview

Business Unit Request Data

Procurement Project Requirements

Participant Information

Progress

Incomplete

Incomplete

Incomplete

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.

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Next

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TEST SITE

SourcingRequestsMy Sourcing Event Requests

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New website for Athletics

Form Number856388

PurposeSourcing Event Request

StatusIncomplete

Details

Instructions

Questions

Business Unit Request D...

Procurement Project Req...

Participant Information

Product Line Items

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Questions - Business Unit Request Data

Print RequestRequest ActionsHistory?

On This Page

Single Point of Contact (SPOC) Basic Information (4)

Sourcing Event Basic Information (7)

Single Point of Contact (SPOC) Basic Information

Business Unit Single Point of Contact (SPOC) \*

Susan Jones

Please list the name of the Business Unit lead for the Sourcing Event.

SPOC Business Unit \*

Athletics

SPOC Phone Number \*

3021234567

SPOC Email \*

sjones@udel.edu

Sourcing Event Basic Information

Desired Work Start Date or Delivery Date

10/28/2023

mm/dd/yyyy

PreviousSave ProgressNext

Complete the Business Unit Request Data questions. Click on the **Question Mark** icon to see additional help text.

Logout



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Sourcing

Requests

My Sourcing Event Requests

0.00 USD

Logout

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New website for Athletics

Form Number856388

PurposeSourcing Event Request

StatusIncomplete

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Questions

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On This Page

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Susan Jones

SPOC Business Unit \*

Athletics

SPOC Phone Number \*

3021234567

SPOC Email \*

sjones@udel.edu

Sourcing Event Basic Information

Desired Work Start Date or Delivery Date

10/28/2023

Previous

Save Progress

Next

Questions marked with a **Star** require a response.

If a required question is not answered, you will not be able to move forward.



Sourcing > Requests > My Sourcing Event Requests

Review and Submit

Form Approvals

SPOC Phone Number \*

SPOC Email \*

Sourcing Event Basic Information

Desired Work Start Date or Delivery Date ⓘ

mm/dd/yyyy

Estimated Award Amount (if known)

What funding types will be used to support this purchase? Select all that apply. \*

☐ University Funding

☐ State Funding

☐ Federal Funding

☐ Other Funding

☐ I don't have funding approved yet.

Term of Contract \*

Previous

Save Progress

Next

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.

New website for Athletics

Form Number 856388  
Purpose Sourcing Event Request  
Status Incomplete

Details ✓  
Instructions  
Questions ⚠  
Business Unit Request Da... ✓  
Procurement Project Req... ⚠  
Participant Information ⚠  
Product Line Items ⚠  
Suppliers ✓  
Review and Submit  
Form Approvals

Questions - Procurement Project Requirements

Print Request Request Actions History ?

On This Page

- Process Basic Information (13)
- Project Basic Information (2)

★ Response Is Required

Process Basic Information

Will a Pre-Bid Meeting be needed and will it be mandatory or non-mandatory for suppliers? \*

A Pre-Bid Meeting is not needed.

Will a Site Visit be needed and will it be mandatory or non-mandatory for suppliers? \*

A Site Visit is not needed.

Will supplier presentations be required? \*

- ☒ Yes.
- ☐ No.
- ☐ To be determined at a future stage.

Do the products and services you are purchasing involve any of these areas? \*

- ☐ Architecture and/or Engineering
- ☐ Communications and Marketing
- ☒ Computer Hardware and/or Software
- ☐ Credit Card Payment Processing
- ☐ Facilities and/or Construction
- ☐ Protected Health Information
- ☐ Unknown/To Be Determined
- ☐ None of these options apply

Will the supplier be providing goods or services that involve the receipt, the use, the maintenance, or the transition of personal data of students, potential students, faculty, staff, or others? \*

Previous Save Progress Next

The Procurement Project Requirements page begins with some basic process questions.



Do the products and services you are purchasing involve any of these areas? \*

- ☐ Architecture and/or Engineering ☐ Communications and Marketing ☒ Computer Hardware and/or Software ☐ Credit Card Payment Processing  
☐ Facilities and/or Construction ☐ Protected Health Information ☐ Unknown/To Be Determined ☐ None of these options apply

Will the supplier be providing goods or services that involve the receipt, the use, the maintenance, or the transition of personal data of students, potential students, faculty, staff, or others? \*

- ☒ Yes  
☐ No  
☐ Unknown

Will there be more than 10 users accessing the platform? \*

- ☒ Yes  
☐ No  
☐ Unknown

Will the supplier be providing goods or services that involve a technology platform or service that will create, obtain, transmit, process or dispose of data, including health data and UD data? \*

- ☒ Yes  
☐ No  
☐ Unknown

Please enter your Technology Request Number: \*

123456

▼ Project Basic Information

← Previous

Save Progress

Next →

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.

Will there be more than 10 users accessing the platform? \*

- ☒ Yes  
☐ No  
☐ Unknown

Will the supplier be providing goods or services that involve a technology platform or service that will create, obtain, transmit, process or dispose of data, including health data and UD data? \*

- ☒ Yes  
☐ No  
☐ Unknown

Please enter your Technology Request Number: \*

123456

#### ▼ Project Basic Information

Upload your Scope of Work for the Sourcing Event. \*

[Scope of Work Template](#)

[Scope of Work - Website for Athletics](#)

Upload ▾

Is there any additional information you would like procurement to know about your potential purchase?

No additional  
information at this  
time.

1961 characters remaining

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**.

◀ Previous

Save Progress

Next ▶

Back to My Sourcing Event Requests

## New website for Athletics

Form Number 856388  
Purpose Sourcing Event Request  
Status Incomplete

Details ✓

Instructions

Questions ⚠

Business Unit Request Da... ✓

Procurement Project Req... ✓

Participant Information ⚠

Product Line Items ⚠

Suppliers ✓

Review and Submit

Form Approvals

## Questions - Participant Information

### On This Page

Evaluation Committee (1)  
Supplier List (2)  
Instructions for Product Line Items and Suppliers (1)

### Evaluation Committee

Please list the five (5) or seven (7) Evaluation Committee members.

Download Evaluation Committee Listing Template  
Download evaluation committee list Upload

### Supplier List

What suppliers do you want invited to this Sourcing Event? Select all that apply. \*

- ☐ I would like to publicly advertise this event on the University Procurement website.
 ☐ I'm open to inviting Diverse Suppliers.
 ☒ I have a list of suppliers that I would like to invite in addition to my other selected options.
 ☐ I would like to advertise by invite only to a specific set of suppliers.
- ☐ I'm open to procurement suggestions.

Please upload the list of suppliers you would like invited to the Sourcing Event using the template below.

Download Supplier to be Invited Template  
Download Supplier List Upload

### Instructions for Product Line Items and Suppliers

On the next two pages you will be required to provide information to advance this form.

On the Product Line Items page, you will be asked to add at least one product line item. However, your scope of work document provides the information that procurement needs. As a work-around, you only need to enter the name of your Sourcing Event and a quantity of one (1) on then click Save Changes. You will be shown a preview of the information entered. Click Next to advance.

Previous

Save Progress

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**.

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New website for Athletics

Form Number828023  
PurposeSourcing Event Request  
StatusIncomplete

Details

Instructions

Attachments

Questions

Department Request Data

Procurement Project Req...

Participant Information

Product Line Items

Suppliers

Review and Submit

Form Approvals

Product Line Items

Please add your first Product Line Item.

Add Product Line Item

Add Product Line Item

Name \*New website for Athletics

Description

2500 characters remaining

Catalog Number

Quantity \*1

Unit of Measure

Commodity Code-Edit

Historical Unit PriceUSD

Target PriceUSD

\* Required

Save ChangesClose

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**.

Logout

RequisitionsSearch (Alt+Q)0.00 USD



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Sourcing ▸ Requests ▸ My Sourcing Event Requests

Requisitions ▾

Search (Alt+Q) 🔍

0.00 USD 🛒

🏠

🔔 3

👤 2

Logout

🏠

🛒

🔧

🔔

🏠

🔧

🔍

➔

New website for Athletics

Form Number 856388

Purpose Sourcing Event Request

Status Incomplete

Details ✓

Instructions

Questions ✓

Business Unit Request Da... ✓

Procurement Project Req... ✓

Participant Information ✓

Product Line Items ✓

Suppliers ✓

Review and Submit

Form Approvals

Product Line Items

Print Request | Request Actions ▾ | History | ?

Add Product Line Item ▾

Line Item Actions ▾

Name	Item Status	Description	Catalog Number	Qty	UOM		
New Website for Athletics	👤		-	1	-	Edit ▾	<input type="checkbox"/>

You will see that the required line has been created allowing you to click **Next** to proceed to the next page.

Previous

Save Progress

Next ➔



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TEST SITE

Sourcing > Requests > My Sourcing Event Requests

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New website for Athletics

Form Number856388

PurposeSourcing Event Request

StatusIncomplete

Details✓

Instructions

Questions✓

Business Unit Request Da...✓

Procurement Project Req...✓

Participant Information✓

Product Line Items✓

Suppliers✓

Review and Submit

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Suppliers

Print Request

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History

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Form Suppliers

Add Suppliers to Form

Search Registered Suppliers

Supplier

RelationshipIn Network

Supplier Contact

Zip Code

Within5 Miles

Commodity Code

Edit

Clear

Search

Previous

Next

The Supplier page is *not* required to complete the form.

The Procurement team will enter your potential suppliers for you.

Click **Next**.

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EXCHANGE

TEST SITE

Sourcing ▸ Requests ▸ My Sourcing Event Requests

Requisitions ▾

Search (Alt+Q)

0.00 USD

Logout

Back to My Sourcing Event Requests

New website for Athletics

Form Number 856388  
Purpose Sourcing Event Request  
Status Incomplete

Details ✓  
Instructions  
Questions ✓  
Business Unit Request Da... ✓  
Procurement Project Req... ✓  
Participant Information ✓  
Product Line Items ✓  
Suppliers ✓

Review and Submit

Form Approvals

Review and Submit

Print Request Request Actions ▾ History ?

Required Fields Complete

Section	Progress
Details	Required Fields Complete
Questions	Required Fields Complete
Product Line Items	Required Fields Complete
Suppliers	Required Fields Complete

Previous Submit

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.

UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Sourcing ▸ Requests ▸ My Sourcing Event Requests

⏪ Back to My Sourcing Event Requests

### New website for Athletics

Form Number 856388  
Purpose Sourcing Event Request  
Status Incomplete

Section	Progress
Details	✓ Required Fields Complete
Instructions	✓ Required Fields Complete
Questions	✓ Required Fields Complete
Business Unit Request Da...	✓ Required Fields Complete
Procurement Project Req...	✓ Required Fields Complete
Participant Information	✓ Required Fields Complete
Product Line Items	✓ Required Fields Complete
Suppliers	✓ Required Fields Complete

### Review and Submit

Form Approvals

Print Request Request Actions History ?

Discard 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.

### Confirm

Are you sure you want to delete this Form? Deleted Form cannot be restored.

Yes No

### Questions:

- [procurement@udel.edu](mailto:procurement@udel.edu)

### Resources:

- [Procurement Services Website](#)

