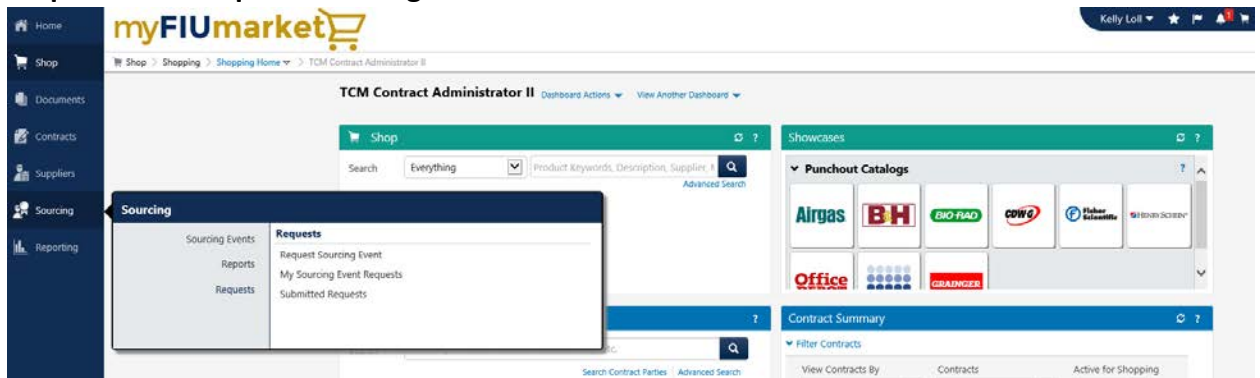
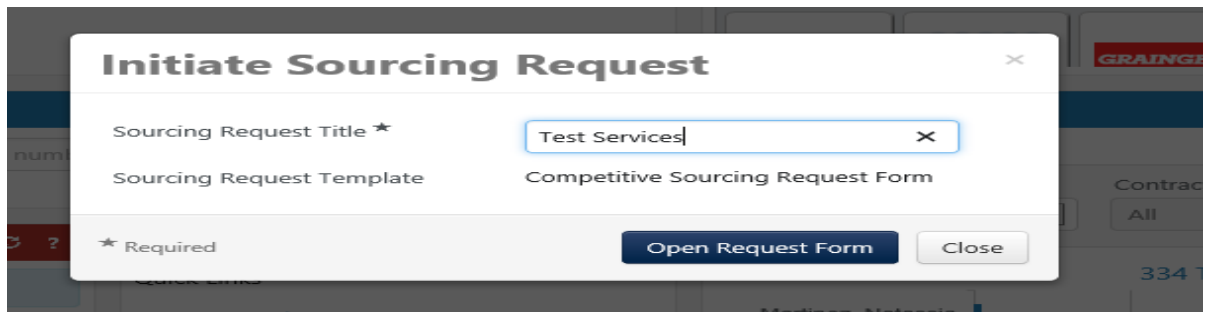


Sourcing Event Request Form SOP

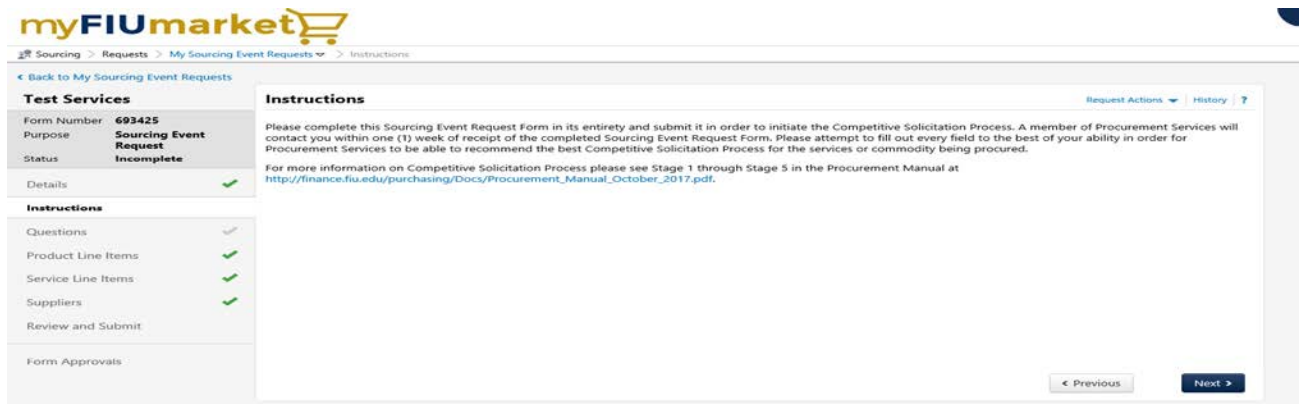
1. Procurement Services can assist with your Sourcing Event Request. If you have a procurement need that is over \$75,000, contact bids@fiu.edu to determine an appropriate procurement method. If it is determined that a competitive solicitation is required, you will need access to the Sourcing Tool via **myFIUmarket** to complete a **Sourcing Event Request Form**.
2. In order to access the Sourcing Tool via **myFIUmarket**, you will need to click [here](#) and following the below-listed steps. We ask that you share this information with your expense manager as he/she will also need to access the system to approve your form.
 - You will have to login with your FIU Username and Password
 - Request the **Sourcing Requester** role to create and submit a Sourcing Event Request Form
 - Request the **Sourcing Approver – Other Dept** role to approve the Sourcing Event Request Form (This is the role your expense manager must select.)
 - Once submitted, the form will automatically route to your HR Supervisor for approval before Procurement Services receives notification of your request
3. Once you have access to myFIUmarket, you may complete the **Sourcing Event Request Form**, which is accessible through the following website:
<https://solutions.sciquest.com/apps/Router/SAMLAuth/FIU>
4. Once you are logged in, click **Sourcing** on the left panel of the page, and then click **Requests** and **Request Sourcing Event**.



5. Your **Sourcing Request Title** should be a brief description of the type of goods and/or services you would like to source. After entering a sufficient title, click **Open Request Form**.



6. The Form Number, Purpose, and Status, are provided for you on the left panel. Once you have read the Instructions click **Next**.



7. Complete all of the required fields that are indicated with an asterisk (*), and save your progress frequently.

The screenshot shows a web application interface for 'Test Services'. On the left is a sidebar with a 'Test Services' header and a list of items: 'Form Number 693425', 'Purpose Sourcing Event Request', 'Status Incomplete', 'Details' (with a green checkmark), 'Instructions', 'Questions' (with a green checkmark), 'Product Line Items' (with a green checkmark), 'Service Line Items' (with a green checkmark), 'Suppliers' (with a green checkmark), 'Review and Submit', and 'Form Approvals'. The main content area is titled 'Questions - Page 1' and has a 'Request Actions' dropdown and 'History' link. Below this is a 'On This Page' section with links for 'Contract Information (6)', 'Department Info (5)', and 'Solicitation Information (19)'. The 'Contract Information' section is expanded and contains several fields: 'Method of Payment *' with radio button options (Pro-Card, Requisition, Un-encumbered Payment, No Monetary Value, Other); 'Anticipated Total Cost of Contract (including any renewals) *' with a dropdown menu; 'Activity or Project ID' with a text input field; 'Amount Budgeted for Contract/Service for First Year *' with a dropdown menu; and 'Cost PID (if applicable)' with a text input field. At the bottom right are buttons for 'Previous', 'Save Progress', and 'Next'.

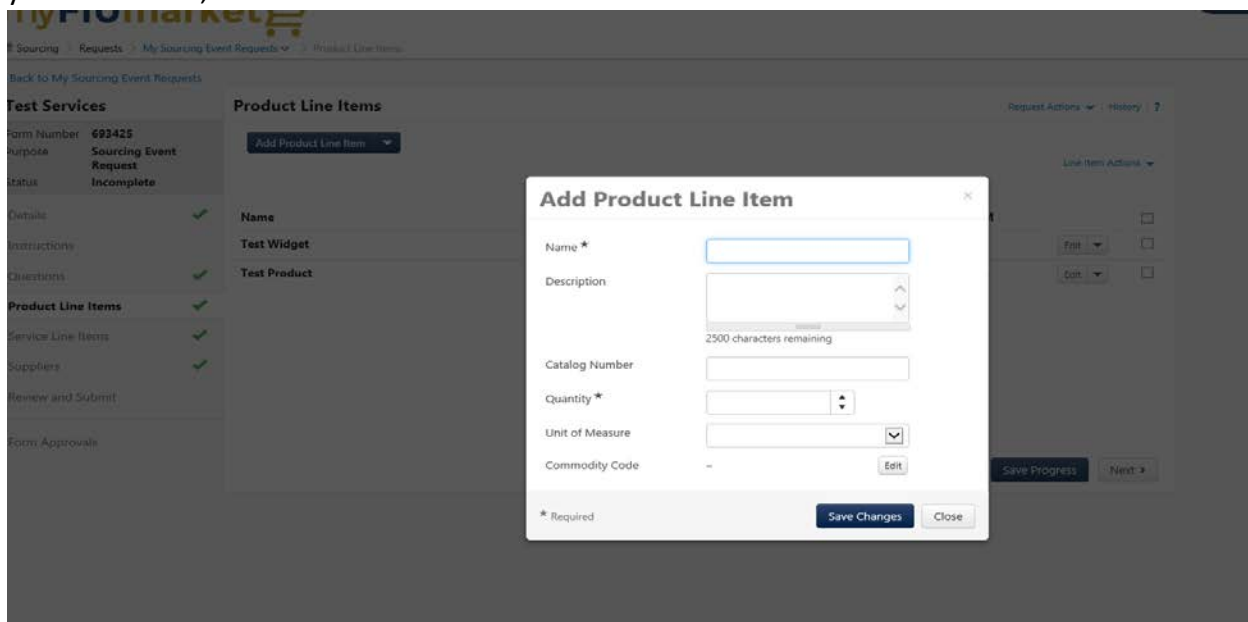
8. After you have answered these questions, you will need to have the following Solicitation Information ready to upload on Page 1.
 - a. **Statement of Objective (SOO):** This describes the overall objectives and primary purpose of the acquisition of the goods and/or services are needed. A SOO provides potential offeror's the flexibility to develop cost-effective solutions and the opportunity to propose innovative alternatives meeting the objectives and required support to achieve the contractual objectives. Use the SOO as a basis for preparing a Statement of Work (SOW) which is an integral part of the solicitation which the Evaluation Committee will evaluate during the selection and award process. Include the length of the initial contract period (i.e. 3 years) and the options for renewals (i.e. 3 one-year renewals). **The renewals of a contract may not exceed 5 years or twice the term of the original contract, whichever is longer.** Provide a concise background or history of the project/goods/services needed, the major components, and the required support that is needed to achieve the contractual objectives. Present a brief overview of your organization and its operations. State your organization's strengths and weaknesses as it relates to the solicitation, and provide information on how your team will be supporting the contract.
 - b. **Calendar of Events:** Identify when the Solicitation needs to be posted and when the Solicitation needs to be completed. Please find the Calendar of Events

template at <http://finance.fiu.edu/controller/Forms.html>, under the Competitive Solicitation Request Forms. If the Scope of Work (which includes detailed specifications and the price sheet) is sufficiently defined, please allow for 2- 4 weeks to get the Sourcing Event posted; otherwise, plan for 4-6 weeks to finalize the solicitation documents before the Sourcing Event can be posted. The Sourcing Event for ITBs are advertised for 30 - 45 days, and ITNs are advertised for 45 -60 days, depending on the complexity of the solicitation.

- c. **Scope of Work (SOW)**: Identify the specific tasks, deliverables, and timeline, in order to achieve your stated objectives. Once the supplier is hired, the scope of work becomes the work guidelines and is a major part of the contract. The SOW should clearly describe the awarded supplier's involvement by defining the services and/or goods (deliverables); the individual tasks that lead to the deliverables; who the tasks are assigned to; the resources needed; the governing process (if applicable); phasing (if applicable); and the time schedule (if applicable). It should also clearly describe the relationship of the supplier's work to the project; who will use the work product; the specific audience to be addressed; and the purpose of the supplier's work. Specify your expectations for performance standards, and your methods for monitoring and implementing corrective action. Please create your SOW as questions so that they can be entered into the Sourcing Director, and suppliers will respond in text format to each question. This allows for easy comparison of supplier's responses to the critical SOW requirements.
- d. **Supplier List**: Provide a list of suppliers (including contact name and email address) that have been utilized in the past for these types of goods and/or services. Conduct a google search to help build a list of suppliers to invite to the solicitation. Please include the contact name and email address who can respond to the solicitation.
- e. **Evaluation Criteria**: Provide evaluation criteria to reflect the critical elements that will be utilized in the evaluation process for the shortlisting and award of an ITN or RFP (it is not needed for an RFQ, ITB or RFI). The supplier's response to the solicitation requirements (SOW, Questions, Experience, Reference, Project Approach, Cost) must provide information that will help in the evaluation process.
- f. **Upload the price sheet**: This includes any costs and financial incentives from the awarded supplier, and core pricing that reflects all of the SOW requirements in and optional price items, if applicable. List the terms of payment for adequate performance. Highlight the basis for incentives for superior performance and penalties for inadequate performance, if applicable. An Excel price sheet will be

utilized for complex solicitations. Otherwise, use this price sheet to input the product or service line items for the sourcing event.

- g. **Objective of the Competitive Solicitation:** This should be similar to the **Statement of Objective** document that was uploaded, except there is a 2,000 character limit. This information will be the first thing a potential supplier will view to determine if they want to respond to the solicitation and is part of the Details: View as PDF file found on FIU's Public Solicitation Portal at <https://bids.scquest.com/apps/Router/PublicEvent?CustomerOrg=FIU>.
 - h. **Competitive Solicitation Title:** This should be a brief description of the goods and/or services needed. This competitive solicitation title is what shows on FIU's Public Solicitation Portal at <https://bids.scquest.com/apps/Router/PublicEvent?CustomerOrg=FIU>.
9. If you are procuring products/goods, click on **Add Product Line Item** and complete the information requested in the dialog box, and **save changes**. Once you have added all of your line items, click **Next**.



10. If you are procuring services, click on **Add Service Line Item** and complete the information requested in the dialog and **save changes**. Once you have added all of your line items, click **Next**.

Add Service Line Item

Name * Consulting Service

Description Senior Consultant

2483 characters remaining

Service Start Date 07/31/2018

mm/dd/yyyy

Service End Date 10/28/2018

mm/dd/yyyy

Quantity * 1.00

Unit of Measure HR - Hour

Commodity Code -

* Required

Save Changes Close

11. Click **Add Suppliers to Form** and search for the supplier. If you find a supplier, click **Add to Form**. Once you have added all of the suppliers, click **Next**.

Suppliers

Form Suppliers Add Suppliers to Form

Modify Search

Supplier Name	Doing Business As	Sales and Corporate Contacts	Action
N Prodigy	NProdigy	No Sales or Corporate Contacts	
NPRODIGY		Scott MacGillivray smacgil@nprodigy.com	Add to Form
nProdigy		No Sales or Corporate Contacts	

Previous Next

12. The **Review and Submit** page will notify you of the completion of the required sections. A green checkmark (✓) will reference completed sections, and a red X (X) will reference incomplete sections. Once all of the sections have a green checkmark, click **Submit**.

myFIUmarket

Sourcing > Requests > My Sourcing Event Requests > Review and Submit

< Back to My Sourcing Event Requests

Test Services

Form Number	693425
Purpose	Sourcing Event Request
Status	Incomplete

Details	✓
Instructions	
Questions	✓
Product Line Items	✓
Service Line Items	✓
Suppliers	✓

Review and Submit

Request Actions | History | ?

✓ Required Fields Complete

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

< Previous Submit

13. Click **Yes** to submit the form.

myFIUmarket

Sourcing > Requests > My Sourcing Event Requests > Review and Submit

< Back to My Sourcing Event Requests

Test Services

Form Number	693425
Purpose	Sourcing Event Request
Status	Incomplete

Details	✓
Instructions	
Questions	✓
Product Line Items	✓
Service Line Items	✓
Suppliers	✓

Review and Submit

Request Actions | History | ?

✓ Required Fields Complete

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

Are you sure you want to submit this form?

Yes No

< Previous

14. You will receive confirmation that the form has been successfully submitted, and the **Status** (displayed on the left panel) will change from **Incomplete** to **Under Review**. To check the status of your **Sourcing Event Request** through the workflow approval, click **Form Approvals** in the left panel.

myFIUmarket

Sourcing > Requests > My Sourcing Event Requests > Review and Submit

[Back to My Sourcing Event Requests](#)

Test Services

Form Number: 693425
 Purpose: Sourcing Event Request
 Status: Under Review

Review and Submit History | ?

✓ Required Fields Complete

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

[Form Approvals](#)

[Previous](#)

15. Click **View Approvers** to view the approvers for your request, and their contact information.

myFIUmarket

Sourcing > Requests > My Sourcing Event Requests > Form Approvals

[Back to My Sourcing Event Requests](#)

Test Services

Form Number: 693425
 Purpose: Sourcing Event Request
 Status: Under Review

Details ✓
 Instructions

Form Approvals

Submitted
7/10/2018 1:59 PM

Procurement
Active
[view approvers](#)

Finish

16. Procurement Services will contact you within 2-3 business days to schedule a meeting to finalize your Sourcing Event Request and to take the next steps to complete the Sourcing Event.
17. After the meeting with Procurement Services has been conducted, and all of the sourcing documents are finalized, the **Sourcing Event Request** form status will go from **Under Review to Approve**

[Back to Submitted Requests](#)

Private Market Data, An... Request Actions | History | ?

Form Number	636374
Purpose	Sourcing Event Request
Status	Approved
	View Associated Sourcing Events

Details ✓

Instructions

Questions ✓

Product Line Items ✓

Service Line Items ✓

Suppliers ✓

Review and Submit

Form Approvals

Please complete this Sourcing Event Request Form in its entirety and submit it in order to initiate the Competitive Solicitation Process. A member of Procurement Services will contact you within one (1) week of receipt of the completed Sourcing Event Request Form. Please attempt to fill out every field to the best of your ability in order for Procurement Services to be able to recommend the best Competitive Solicitation Process for the services or commodity being procured.

For more information on Competitive Solicitation Process please see Stage 1 through Stage 5 in the Procurement Manual at http://finance.fiu.edu/purchasing/Docs/Procurement_Manual_October_2017.pdf.

Previous
Next

18. **Form Approvals** will show the approval status and timestamps for the solicitation.

[Back to Submitted Requests](#)

Private Market Data, An... Request Actions | History | ?

Form Number	636374
Purpose	Sourcing Event Request
Status	Approved
	View Associated Sourcing Events

Details ✓

Instructions ✓

Questions ✓

Product Line Items ✓

Service Line Items ✓

Suppliers ✓

Review and Submit

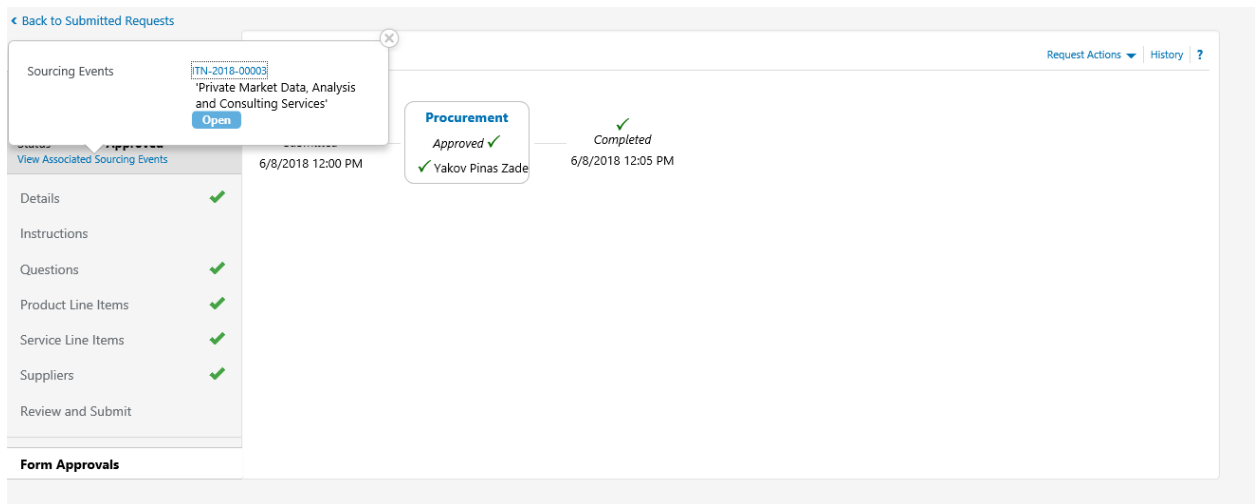
Form Approvals

Procurement

Submitted Approved ✓ Completed ✓

6/8/2018 12:00 PM ✓ Yakov Pinas Zade 6/8/2018 12:05 PM

19. The **Sourcing Event Request Form** will automatically route to Procurement Services. Click on **View Associated Sourcing Events** to see the status, and the **Sourcing Event number** to view the event.



20. Once you've completed all steps documented in the Sourcing Request SOP and submitted the form, Procurement Services will review your request and will contact you within 2-3 business days to schedule a meeting.

21. If the **Event Status** is open, you can view the solicitation, the required questions, and when the event closes. If any information is missing, please contact Procurement Services for assistance.

This event is **Open**, and will be closed on 7/23/2018 2:00 PM EDT. You may view responses on 7/23/2018 2:00 PM EDT. Workflow Actions ▾

Private Market Data, Analysis and Consulting Services
ITN-2018-00003

Type: **Invitation to Negotiate**
Event Status: **Open**
Form Request: [Private Market Da...](#)

Settings and Content ▾

- Setup ✓
- Users ✓
- Description (Statement of O... ✓
- Prerequisites 9
- Buyer Attachments 0
- Questions** 43
- Cover Letter/Executive S...
- Company Contacts, Expe...
- Response to ITN Specif...
- Compensation and Fees
- Financial Statements
- Additional Item Fields
- Items 13
- Suppliers 22

Questions Event Actions ▾ | History ?

[Export Questions](#)

5 Pages of Questions

#	Page Title	Question Groups	Total # of Questions	
1	Cover Letter/Executive Summary	• Group 1.1: Cover Letter/Executive Summary	2	Actions ▾
2	Company Contacts, Experience	• Group 2.1: Company Contacts, Experience	9	Actions ▾
3	Response to ITN Specifications	• Group 3.1: Response to ITN Specifications	26	Actions ▾
4	Compensation and Fees	• Group 4.1: Compensation and Fees	5	Actions ▾
5	Financial Statements	• Group 5.1: Financial Statements	1	Actions ▾

◀ Previous
Next ▶

22. To view the suppliers that were invited to participate in the solicitation, click **Suppliers**.
 If a supplier missing from this list, please contact Procurement Services for assistance.

Private Market Data, Analysis and Consulting Services
ITN-2018-00003

Type: **Invitation to Negotiate**
Event Status: **Open**
Form Request: Private Market Da...

Settings and Content ▾

- Setup ✓
- Users ✓
- Description (Statement of O... ✓
- Prerequisites 9
- Buyer Attachments 0
- Questions 43
- Cover Letter/Executive S...
- Company Contacts, Expe...
- Response to ITN Specific...
- Compensation and Fees
- Financial Statements
- Additional Item Fields
- Items 13
- Suppliers** 22
- Evaluations >

Suppliers Event Actions ▾ | History | ?

Event Suppliers (22) [Add Suppliers to Event](#)

22 Event Suppliers

1-20 of 22 Results ▾ < > 20 Per Page ▾

Supplier Name	Doing Business As	Sales and Corporate Contacts
Ardent Technologies Inc		Vas Appalaneni vendorregistration@ardentinc.com Add Contact
Boston Consulting Group		Pat Binns binns.pat@bcg.com
Campus Labs, Inc.		Griffin Brock gbrock@campuslabs.com Add Contact
CBINSIGHTS		Robert Chen rchen@cbinsights.com Add Contact
Civis Analytics		Amy Deora adeora@civisanalytics.com Add Contact
DataHaven Consulting LLC		Yandy Plasencia yandy.plasencia@datahavenanalytics.com

[< Previous](#) [Save Progress](#)