



Bidding on an Event in Sourcing Director (Responding to an Event)

This job aid is designed to assist Suppliers in responding to a Sourcing Event to which they have been invited. If you have been invited and are not already registered with the University or in the SciQuest, please see the UMich Supplier Guide for information on registering.

1. An invited Supplier will receive an email with basic information on the Event and a link to view it. Clicking on the link will take you to the login page.

From: University of Michigan Procurement [mailto:umich.procurement@umich.edu]
Sent: Wednesday, May 13, 2015 3:31 PM
To: sales@company.com
Subject: University of Michigan Procurement Request for Quotation - "Event Title"

Dear Company.com,

You have been invited to participate in the following Request for Quotation.

Event Number: RFQ-00000XX-TECH-2015-SW
Event Title: Event Title
Event Open Date: 5/13/2015 at 4:00:00 PM EDT
Event Close Date: 5/18/2015 at 4:00:00 PM EDT
Issuing Company: University of Michigan Procurement

[Please click the link to view the sourcing event](#)

1

For first time users, when you click the link above you will be taken through a registration process. This registration will allow you to create an account and then gain access to view the event.

Please note that you will need to select "Yes, I Intend to Bid" to be able to respond to this event. If you will not be submitting a bid, please choose "No Bid".



2. Clicking on Login will take you to the Login page.
3. To access the site, enter both your email, password and click on login

**FINANCE
PROCUREMENT SERVICES
UNIVERSITY OF MICHIGAN**

ENGLISH ▾

Welcome to the University of Michigan's supplier registration and sourcing system!

If you have a Login ID (e-mail address) and password please enter them in the Supplier Login to the left and click the "Login" button to view sourcing events you have been invited to or to update your company information.

Email
Password

LOGIN [Trouble logging in?](#) **3**

If you do not have a Login ID and password or have been invited to a sourcing event and never registered, please click on the Create Account button below and follow the instructions.

After completing registration, your firm is added to a database used by procurement agents when compiling bid lists or providing potential supplier names to departments. Registration with the University does not guarantee that you will receive bid requests or prequalify you as a supplier. Some contracts are long-term and may not expire for several years. In addition, there may be many suppliers registered that provide products and services similar to yours. It is not always practical to include all registered suppliers for a particular bid. Should the interest or the need for your company's products or services present itself, you will be contacted by a procurement agent.

CREATE ACCOUNT

Please contact University of Michigan (Procurement Services) at procurement.services@umich.edu or +1 734-764-8212 for assistance.

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4. If this is your first time accessing the system, then you will need to create an account by selecting “Create Account”

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CREATE ACCOUNT **4**

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5. If are creating a new account you will be directed to the following page, where you enter your email and then select next



FINANCE
PROCUREMENT SERVICES
UNIVERSITY OF MICHIGAN

ENGLISH ▾

Welcome to the University of Michigan's supplier registration and sourcing system!

If you have a Login ID (e-mail address) and password please enter your email address below and click the "NEXT" button to view sourcing events you have been invited to or to update your company information.

Enter your email to Login/Create Account

Email

5

NEXT

If you do not have a Login ID and password or have been invited to a sourcing event and never registered, please enter your email address, click the "NEXT" button, and follow the instructions.

After completing registration, your firm is added to a database used by procurement agents when compiling bid lists or providing potential supplier names to departments. Registration with the University does not guarantee that you will receive bid requests or prequalify you as a supplier. Some contracts are long-term and may not expire for several years. In addition, there may be many suppliers registered that provide products and services similar to yours. It is not always practical to include all registered suppliers for a particular bid. Should the interest or the need for your company's products or services present itself, you will be contacted by a procurement agent.

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6. The Summary page will show you the sections of the event to be read and addressed. There may be Prerequisites that need to be viewed and acknowledged before continuing on to view the rest of the Event. If so, click on Proceed to Prerequisites.

The screenshot displays the 'Summary' page for a procurement event. The header includes the University of Michigan logo and navigation links. The event title is 'bid job aids' with ID 'RFQ-0000061-GGS-2015'. The response status is 'Not Started' with a bid total of '0.00 USD'. A yellow banner indicates prerequisites must be completed before viewing details, with a 'Proceed to Prerequisites' button highlighted by a red box and the number 6. The event details table lists the event type as 'Request for Quotation', release date as '8/7/2015 3:00 PM EDT', and other key dates. The contacts section identifies the buyer as 'BUYER USER WITH FOOD' with email 'prps@umich.edu'. The description states this is an invitation to bid for products/services, with a note that the purchase is for one-time pricing and that the University includes the Principal. The stage description is currently blank.

Event Title	bid job aids	Time Zone	EDT/EST - Eastern Standard Time (US/Eastern)
Event Type	Request for Quotation	Release Date	8/7/2015 3:00 PM EDT
Event Number	RFQ-0000061-GGS-2015	Open Date	8/7/2015 3:30 PM EDT
Stage Title	-	Close Date	8/7/2015 4:00 PM EDT
Currency	USD	Question Submission Close Date	8/7/2015 4:00 PM EDT
Payment Terms	-		



7. The Prerequisites will show. Each needs to be clicked on and read, but will be in one of three categories: Optional, Required to View Event, or Required to Enter Bid. Required to View Event and Required to Enter Bid need to be read and checked as acknowledged. They may also require that you upload a file. Required to Enter Bid Prerequisites will be marked with a star. Required to View Event Prerequisites will be marked with a lock icon.

The screenshot displays the 'Prerequisites' section of the University of Michigan Procurement Services portal. The page title is 'Prerequisites' and it includes a 'History' link. A message states: 'Please review and agree to the prerequisites listed below.' Below this, a section titled 'Prerequisites Required to View Event' indicates that mandatory prerequisites must be completed before viewing event details. The list of prerequisites includes: 1. 'Read and Certify' (lock icon) for 'SPECS/PRICING & PAYMENT/ CONDUCT/RIGHTS & RESTRICTIONS/ ACKNOWLEDGEMENTS', which is highlighted with a red box and labeled '6'. 2. 'Read and Certify' (star icon) for 'BASIC TERMS AND CONDITIONS- PRODUCT PURCHASE'. 3. 'Read and Certify' (star icon) for 'EXAMINATION OF SITE'. 4. 'Read and Certify' (star icon) for 'GENERAL PRICING AND PAYMENT TERMS'. 5. 'Read and Certify' (star icon) for 'ONE-TIME PURCHASE'. 6. 'Read and Certify' (star icon) for 'SUSTAINABILITY'. 7. 'Read and Certify' (star icon) for 'HIPAA COMPLIANCE-NO BAA NEEDED'. The 'Save Progress' button at the bottom right is highlighted with a red box and labeled '7'. The left sidebar shows the 'Prerequisites' tab selected, and the event details on the left show 'Response Status: Not Started', 'Intent To Bid: Not Set', and 'Bid Total: 0.00 USD'.

8. Once you have completed the Prerequisites, click on Save Progress.



9. After finishing the Prerequisites, you can choose to enter your Intent to Bid. This must be done at some point in the response in order to submit a bid. If you determine that you do not wish to bid on this Event, please click on No Bid. You will have the opportunity to enter a comment on why you choose not to, but it is not required to fill out.

The screenshot displays the 'Prerequisites' section of the University of Michigan Procurement Services portal. The page header includes the University of Michigan logo and the text 'FINANCE PROCUREMENT SERVICES UNIVERSITY OF MICHIGAN'. The user is logged in as 'Steve Test'. The page shows a sidebar with navigation links: Sourcing, Sourcing Events, Search Events, and Prerequisites. The main content area is titled 'Prerequisites' and includes a section for 'bid job aids' with details for RFQ-000001-GGS-2015. The 'Response Status' is 'Not Started' and the 'Intent To Bid' is 'Not Set'. The 'Prerequisites' section lists five items to be read and certified: 1. SPECS/PRICING & PAYMENT/ CONDUCT/RIGHTS & RESTRICTIONS/ ACKNOWLEDGEMENTS, 2. BASIC TERMS AND CONDITIONS- PRODUCT PURCHASE, 3. EXAMINATION OF SITE, 4. GENERAL PRICING AND PAYMENT TERMS, and 5. ONE-TIME PURCHASE. Each item has a checkbox and a text area for certification. A red box highlights the 'Yes, I Intend to Bid' and 'No Bid' buttons. A black box with the number '9' is overlaid on the right side of the page.



10. After finishing the Prerequisite section, you may have Questions to answer. Each question will be set to request an answer from one of a variety of formats (yes/no, single line text, multi-line text, attachment, etc.) and may or may not be required as part of your response. Required questions will be noted by a star at the end of the question.

The screenshot shows the 'Questions & Answers' page for a bid. The left sidebar contains navigation links: Sourcing, Sourcing Events, Search Events, and Questions. The main content area is titled 'Questions' and includes a 'Please review and respond to the questions below. You may save progress at any time.' message. Below this, there are sections for 'On This Page' and '1: Warranty & Product Certification'. The 'On This Page' section lists questions 1 through 6. The '1: Warranty & Product Certification' section contains questions 2.1, 2.2, and 2.3. Question 2.3 is highlighted with a red box and labeled '10'. At the bottom of the page, the 'Save Progress' button is highlighted with a red box and labeled '11'.

11. When you have finished answering all questions, click on Save Progress.



12. After Questions, the Event Items are next. Click on View Details to get more information on each item listed. Items will require a unit price, and may require an estimated Delivery date.

bid job aids
REQ-000001-0005-2015

Event Details
Response Status: **Draft**
Intent To Bid: **Yes**
Bid Total: **0.00 USD**

Summary
Prerequisites: **✓**
Questions: **✓**
Items: **✓**

Review & Submit
Q & A Board
My Exports and Imports

Items
Please provide the price per unit and an estimated delivery date. The total price will be calculated when progress is saved. Additional information can be expressed to the buyer in the comments for each item.

Import Options: **▼** Export Items

Product Line Items (1)

Go To: **All Groups**

Group P1 (1 - 1 of 1 items)

#	Item Name, Description, Etc	Qty	UOM	Requested Delivery	Unit Price (USD)	Total Price (USD)	Estimated Delivery	
P1.1	test item ★ View Details	6	Each		25	-	06/10/2015	Respond to Item

Comment:
1000 characters remaining

Total Price (USD) 0.00

Total for Product Items 0.00 USD
Total for Service Items 0.00 USD
Grand Total for Bid 0.00 USD

* Required

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



13. During your viewing and responding to the Event, you may have questions for clarification. These questions should be posted by clicking on the Q&A Board.

The screenshot shows the 'Question & Answer Board' interface for a procurement event. The sidebar on the left contains a list of links: 'Sourcing', 'Sourcing Events', 'Search Events', 'Question & Answer Board', 'bid job aids', 'RFQ-0000061-GGS-2015', 'Event Details', 'Response Status: Draft', 'Intent To Bid: Yes', 'Bid Total: 150.00 USD', 'Summary', 'Prerequisites', 'Questions', 'Items', 'Review & Submit', and 'Q & A Board' (highlighted with a red box). The main content area is titled 'Question & Answer Board' and includes a status bar indicating the event closes in less than 1 hour. It also features a summary of prerequisites, questions, and items, and a section for asking questions. A black box with the number '13' is overlaid on the 'Q & A Board' link in the sidebar.



14. Once there, click on Ask a Question.

The screenshot shows the 'Question & Answer Board' for the 'bid job aids' event. The sidebar on the left contains event details: 'Response Status: Draft', 'Intent To Bid: Yes', and 'Bid Total: 150.00 USD'. The main area has a 'Question & Answer Board' header with a red box around the 'Ask a Question' button. Below the header, there is a section for 'Public Q&A (0)' and 'My Questions (1)'. A question titled 'widget size' is visible, asking 'How big can the widgets be?'. The question was asked on 8/7/2015 3:38 PM EDT by 'Steve Test' (My Question). The status is 'No answer yet. The submitting organization may withdraw this question until it is answered. Withdraw this Question'.

15. The Question & Answer Board will open up. Click on Ask a Question.

The screenshot shows the 'Question & Answer Board' for the 'bid job aids' event. The sidebar on the left contains event details: 'Response Status: Draft', 'Intent To Bid: Yes', and 'Bid Total: 150.00 USD'. The main area has a 'Question & Answer Board' header with a red box around the 'Ask a Question' button. Below the header, there is a section for 'Public Q&A (0)' and 'My Questions (1)'. The status is 'No questions and answers have been made public yet.'.

16. The Ask a Question popup will open. Enter the Subject and Question, then click SubmitQuestion.

Ask a Question

Subject * widget size

Question * How big can the widgets be?

4973 characters remaining

Disclaimer
 Please note that submitted questions and associated answers may be exposed to all participating vendors, at the discretion of the sponsoring Organization.

* Required 16 **Submit Question** Close

17. After submitting a question, you have the option to withdraw it.

Question & Answer Board Event Actions History ?

Ask sourcing event related questions, receive responses, and read other supplier's questions and answers that have been made public.

Ask a Question

Public Q&A (0) My Questions (1)

Sort by Date Asked: Most Recent First

▼ **widget size**

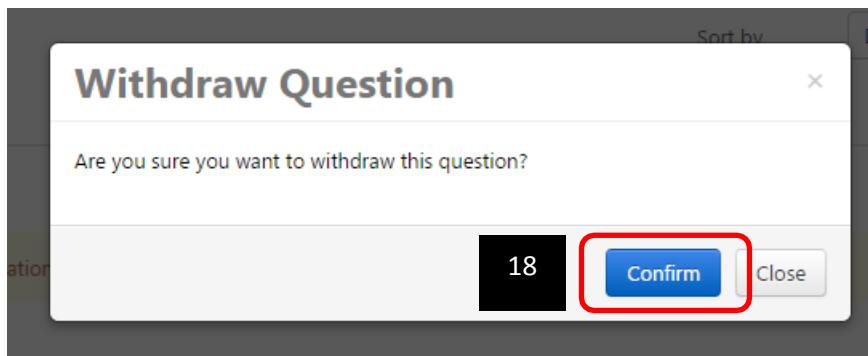
How big can the widgets be? Asked 8/10/2015 3:00 PM EST by Steve Test (My Question)

No answer yet. The submitting organization may withdraw this question until it is answered. **Withdraw this Question**

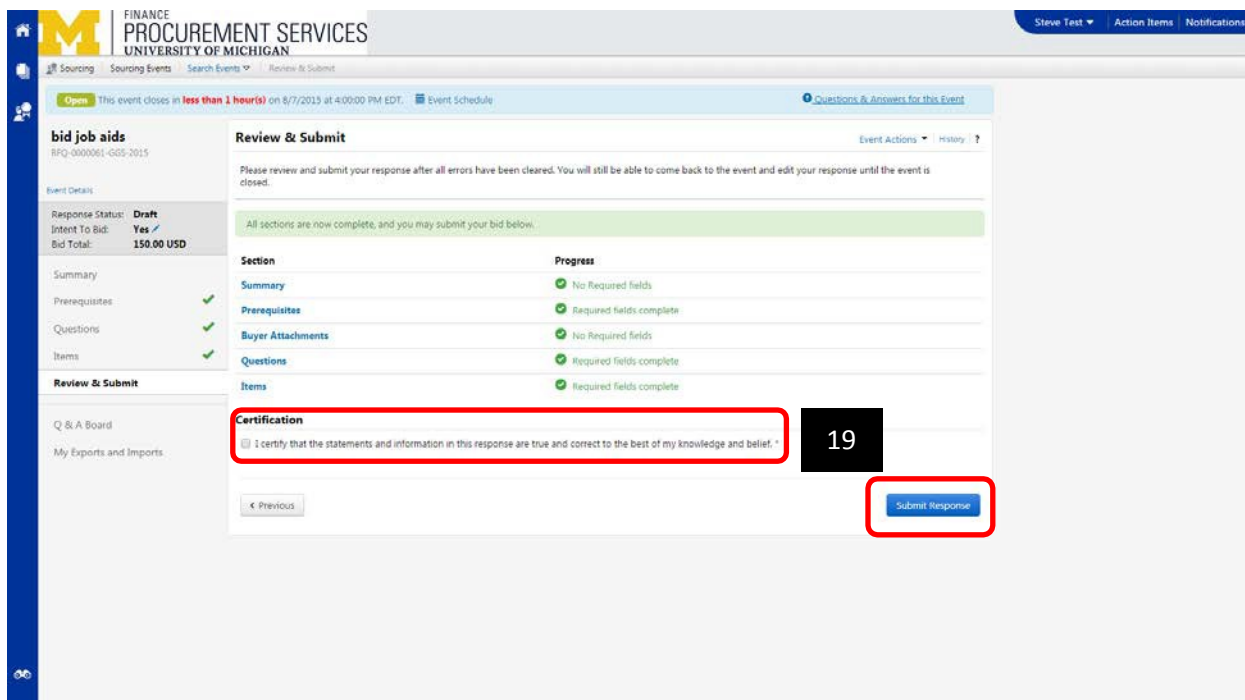
17



18. Once you click on Withdraw this Question you will get a confirmation popup. Click on Confirm to withdraw.



19. Once all the sections of the bid are completed, you can go to the Review and Submit page. The Certification box must be checked, and then you can click on Submit Response. Note: Response must be submitted before the close date/ time.





20. A Response Submitted confirmation will show. The Response can be withdrawn or changed up until the close date/time.

The screenshot shows the 'Response Submitted' confirmation page in the University of Michigan Procurement Services system. The page header includes the University of Michigan logo and the text 'FINANCE PROCUREMENT SERVICES UNIVERSITY OF MICHIGAN'. The user 'Steve Test' is logged in, with 'Action Items' and 'Notifications' links. The main content area features a green banner with the text 'Response Submitted' and a large black box with the number '20'. Below this, the 'Next Steps' section states: 'You have submitted a bid of 150.00 USD. You have until 8/7/2015 4:00 PM EDT to withdraw or change your bid.' It includes links for 'Return to Home Page' and 'Event Summary'. The 'Event Summary' section displays the following details:

Event Summary	
Event Title	bid job aids
Event Type	Request for Quotation
Event Number	RFQ-0000061-GGS-2015
Stage Title	--
Currency	USD
Payment Terms	--
Time Zone	EDT/EST - Eastern Standard Time (US/Eastern)
Release Date	8/7/2015 3:00 PM EDT
Open Date	8/7/2015 3:30 PM EDT
Close Date	8/7/2015 4:00 PM EDT
Question Submission Close Date	8/7/2015 4:00 PM EDT