CREATING AN RFB IN STRATEGIC SOURCING CHECKLIST

Role: SS Manager

The checklist below lists all steps (including optional steps) that need to be taken to complete an RFB event in the Strategic Sourcing module in PeopleSoft. Please note that this checklist covers the technical steps that need to be taken. Any other business processes taken outside of the system will not be represented here.

- ☐ Create a new RFB event by pulling in an RFB template or uploading the main document *(Create Event Job Aid p. 3)*
- ☐ Add bid factors *(Create Event Job Aid p. 6)*
- ☐ Add a cost sheet *(Create Event Job Aid p. 10)*
- ☐ Assign NIGP codes *(Create Event Job Aid p. 15)*
- ☐ Use View as Bidder to review the document and bid factors from the bidder's point of view *(Create Event Job Aid p. 16)*
- ☐ Share a draft of the bid document with collaborators *(Create Event Job Aid p. 18)*
- ☐ Use Manage Event Security to add collaborators and change the approver (if necessary) *(Create Event Job Aid p. 21)*
- ☐ Submit the event for approval *(Create Event Job Aid p. 23)*
- ☐ Once approved, post the event to VendorNet and eSupplier *(Create Event Job Aid p. 24)*
- ☐ As bidder questions and clarifications are received, respond to bidders using the Event Q & A functionality *(Responding to Bidder Communications Job Aid p. 3)*
- ☐ (Optional) If a bidder cannot respond via eSupplier, submit the responses on their behalf as a proxy *(Entering a Proxy Bid Job Aid p. 1)*
- ☐ Once the questions close, select the bid responses for award *(Awarding an Event Job Aid p. 3)*
- ☐ Award the event *(Awarding an Event Job Aid p. 14)*