



## Strategic Sourcing Create Event Quick Reference Guide

Use this check list to create a new event. **For more in depth detail refer to your training documentation.**

Step	Description	Comments
1.	Decide what business unit you are creating the event for.	<b>Enter the Business Unit.</b> If you are an SPD buyer create under the Agency BU. Otherwise, create as BU 99999 with Origin code of SPD.
2.	Enter RF Type	Is this an RFP or RFQ?
3.	Enter Origin	Agencies should select their department's origin. If SPD buyer is creating on behalf of an SAO agency enter SPD. If SPD creating on behalf of a non-SAO Agency enter the appropriate origin from the look up option. If BU is 99999, origin must be SPD.
4.	Enter Fiscal year	
5.	Event Name	Limited to 50 characters – Posts on the GPR
6.	Event Description	Enter the long description of the event. Make sure to spell check. If pasted in, make sure that there are no weird characters.
7.	Copy From	You can copy from: Contract Delimited File (Must be formatted correctly) Item Master <b>Purchase Order (Do Not Use)</b> Request For Information Requisition (Must have an approved status) Sourcing Event Sourcing Template After selecting the copy from source click on “GO” and enter the required information. Select the lines that you wish to copy.
8.	Enter Category Type	Select from drop down
9.	Enter Purchase Type	Select from drop down
10.	Click on Event Settings and Options	Review the options and make the appropriate selections.
11.	Click Payment Terms and Contact Info	Make sure that the contact information is complete with a phone number. Check the Tax Exempt box and Enter: State of GA. Enter Payment terms if appropriate.
12.	Click Event Comments and Attachments	Enter standard comments. Attach relevant documents. Non-line specific attachments should be attached here. Cost related attachments should be added at the line.  Your attachment options are: <b>Display to Bidder</b> – Select this check box if you want this attachment to be available to bidders. This also puts the attachment name in the body of the event invitation and event interest emails. <b>Include on Award</b> – Select this check box if you want to include this attachment with the award. <b>Include in Notification</b> – <b>UNCHECK THIS OPTION.</b> You could select to include the attachment in the



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		event invite and event interest notifications that are sent to the bidders. Due to email constraints the State has opted to not send these files attached to the event Invitation. The bidder must log on to view the files.
13.	Click Header Bid Factors	Enter the appropriate bid factors for the RF type. Add any additional bid factors required.
14.	Click Line Items	If a requisition was copied in, the line items need review. Note the number of requisition lines and the number of event lines that are created. If you are creating the line items, the fields must be complete with description, category code, UOM, Qty and a price.
15.	Add line item comments and attachments	Optional
16.	Add line item bid factors	Optional
17.	Click Line item defaults	Optional information
18.	Click Advanced Definition	Optional information
19.	Click search for bidders	Click on the Recommend bidders and select all.
20.	Invite ad hoc (vendor on the fly) bidders	Optional - Click on the Contact Details icon on the PUBLIC_AUC entry and enter names and email addresses of additional vendors you want to invite.
21.	Click Invite Collaborators	Optional - Before inviting, change the preview, start, and end date of the event to allow time for the collaboration. Collaboration must complete before the Preview date.
22.	Review Preview, Start and End Dates	Do not end your event on a Monday if at all possible. If there are technical issues this will give time to resolve issues and still allow responses to be entered.  Preview Date and Start Date are typically the same. If you have a pre-bid conference you may want the bidders to see the event (preview) for a period of time prior to the start date.
23.	Save Event	Note the event number for your records.
24.	Review the Event	Make sure that dates are correct, all attachments, bid factors and information is correct.
25.	Review the End Date again	Make sure the end date/time is not scheduled on a State Holiday or will be affected by system maintenance. Times should reflect reasonable business hours and be at the half or full hour.
26.	Post the Event	Vendors can now view and respond to the event (after the start date).
27.	Review the process monitor Process Scheduler→Process Monitor Enter User ID and Enter AUC_PDF as the Name Field  Name: <input type="text" value="AUC_PDF"/>	Review the process monitor and make sure that the AUC_PDF process runs to a successful completion and is Posted. If the process indicates No Success or Not Posted immediately report the issue providing the process instance number.
28.	Validate GPR	Log on to GPR and verify that your event is posted.