

# Sourcing Request Form



# Sourcing Request Form

- Submit the [Sourcing Request Form](#) to request help on a Sourcing project.
- Once submitted, the form will be routed to Procure to Pay, which will assess your current spend, evaluate the supply chain, conduct market research and a total cost analysis, identify suitable suppliers, develop a strategy for sourcing, negotiating, and contracting, and track/manage supplier performance.

1 Click the **Request Forms** tile on the **Guided BU**ying homepage.

2 Select the **Sourcing Request Form**.

The image shows a two-step process for navigating to the Sourcing Request Form. The first step shows the 'Guided Buying' homepage with a grid of category tiles. A red circle highlights the 'Request Forms' tile, which features a large question mark icon. The second step shows the 'Request Forms' selection screen, where three 'Custom form' options are listed: 'Supplier Request Form', 'Sourcing Request Form', and 'Contract Request Form'. A red circle highlights the 'Sourcing Request Form' option.

**Guided Buying**

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Request Forms

**Request Forms**

Please use these forms to request help from Sourcing & Procurement or Accounts Payable.

Custom form Supplier Request Form All

Custom form **Sourcing Request Form** All

Custom form Contract Request Form All

**BOSTON UNIVERSITY**

# Sourcing Request Form

- Complete the [Sourcing Request Form](#), including as much detail as possible.
- Your name and email address will populate the request.
- Required fields are indicated with red asterisks.

The screenshot shows the 'Sourcing Request Form' interface. At the top, there are 'Cancel', 'Save', and 'Submit' buttons. Below the header, instructions state: 'Please use this form to submit a request for assistance with a sourcing project. Requests can include identifying sources of supply, conducting a competitive bid or quote solicitation, and/or developing a negotiation strategy.'

The form contains several fields, some of which are highlighted with red boxes and numbered callouts:

- Callout 3:** Points to the 'Requester Name' and 'Requester Email' fields. The 'Requester Name' field contains 'Erika Lonardo' and the 'Requester Email' field contains 'elonardo@bu.edu'.
- Callout 4:** Points to the 'Department Name' and 'Phone Number' fields. The 'Department Name' field contains 'Facilities Management & Operations' and the 'Phone Number' field contains '617-353-2370'.
- Callout 5:** Points to the 'Description of Sourcing Project' field, which contains a detailed text about Boston University's fire alarm system inspection and testing needs.

Below the description field, there is a 'Sourcing Category' dropdown menu with the following options: '(None)', 'Business & Site Services', 'Facilities', 'Research', and 'Technology'. The 'Facilities' option is selected.

## Special Instructions:

- 3 Enter Department Name and Phone Number.**
- 4 Description of Sourcing Project:**  
Provide detailed information on project.
- 5 Sourcing Category:**  
Select the appropriate category.

**Note:** Click "Save" instead of "Submit" if you want to return to the form and complete it later.

## Sourcing Request Form

Provide details for the request including suppliers, internal stakeholders to include, budget and desired project execution date.

The form is titled "Sourcing Request Form" and contains several sections. A red box highlights the "Supplier information" section, which includes a text area with the text "We are considering Fire Alarm Boston, but would like the assistance of Sourcing to make the best decision." A red circle with the number 6 is next to this section. Below this is the "Project Team" section, which includes a text area with the text "Erika ~~Lonardo~~". A red circle with the number 7 is next to this section. Below this is the "Do you have an estimated budget?" section, which includes a dropdown menu with the text "Yes". A red circle with the number 8 is next to this section. Below this is the "Estimated Budget" section, which includes a text area with the text "150,000" and a dropdown menu with the text "USD - US Dollar". A red circle with the number 8 is next to this section. Below this is the "Desired Project Execution Date" section, which includes a date picker with the text "07/22/2020". A red circle with the number 9 is next to this section. Below this is the "Further attachments for information" section, which includes an "Upload file" button and a file attachment labeled "Fire Alarm Boston.pdf". A red circle with the number 9 is next to this section.

Supplier information ⓘ

We are considering Fire Alarm Boston, but would like the assistance of Sourcing to make the best decision.

Project Team

Erika ~~Lonardo~~

Do you have an estimated budget? \*

Yes

Estimated Budget \* ⓘ

150,000 USD - US Dollar

Desired Project Execution Date ⓘ

07/22/2020

Further attachments for information ⓘ

Upload file

Fire Alarm Boston.pdf x

### Special Instructions:

- 6 Supplier information:**  
Note suppliers to include in the sourcing event.
- 7 Project Team:**  
Note individuals or groups who need to be included in the project.
- 8 Details:**  
Indicate if you have an estimated budget and enter a desired execution date.
- 9 Attachments:**  
Upload any relevant documentation.

## Sourcing Request Form

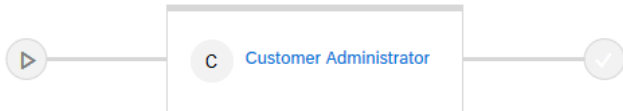
Finish completing required fields and click "**Submit**."

Status of submitted forms can be found by navigating to the **Guided BU** [homepage](#) and clicking **Your Requests**.

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Approval 

Changes to the form may affect the approval process. Click the refresh icon to see the most current process.



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Your form 'SOR3 - Sourcing Request Form' has been submitted!

### Special Instructions:

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View Approval Workflow

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Click **Submit** and view confirmation.

### Next Steps:

The Sourcing Request Form is sent to Procure to Pay.

A Sourcing team member will reach out regarding the project.

**Note:** Converse with Procure to Pay using the comment section of the form.

Comments do not generate emails. Please check back to see comments.