

QUICK REFERENCE GUIDE

Create an Event Template (Sourcing)

June 1, 2011; Revised Dec. 8, 2011

An Event Template is a tool for creating a standard layout, look and feel for an event that can then be used as a starting point when creating a new event. Templates can be used to copy Event Settings, Header Bid Factors, Bidders/Vendors and Line information into a new sourcing event instead of having to recreate the new event from scratch. During the course of your business transactions you may want to create Event templates that can be used by your agency buyers for those particular events that occur frequently. Agency Buyers may have the capability to create Event Templates based on security.

1. **Navigate** to Sourcing , Create Events, Maintain Templates
2. Click the **Add a New Value** Tab
3. Enter your **Business Unit** and **Origin**
4. Select a **Template Type** from the drop down menu. The Template Types include the following;
 - a. **Business Unit** Template - Template that can be used within a giving agency.
 - b. **Department** Template – Template that can only be used by those people that have access to a given department
 - c. **Personal** Template – Template that is only available to you.
5. Enter the **Template ID** (this is the ID that you want the template to have. If you are doing a BU wide template you will want the ID to be something all your BU buyers will recognize.)
6. Click **Add** button
7. Create the Template just as you would create an Event. Perform the following;
 - a. Provide the “**Step 1: Event Basics**” information such as Settings and Header Bid Factors.
 - b. Enter “**Step 2: Configure Line Items**” Line information and Line Bid Factors. Note: You need to add at least one line item into the template. If you do not have a particular commodity or item that you want to use then it is suggested that you select a commodity with a quantity of 1 and an amount of .01. You can always change/delete the line when you create your event from the template.
 - c. Optional – Enter “**Step 3: Select Bidders to Invite**” to set the event to Public and/or identify particular vendors.

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Favorites | Main Menu > Sourcing > Create Events > Maintain Event Templates

New Window | Customize

Modify an Event

Event Summary

Business Unit: B0401 Event ID: 2000000254 Round: 1 Version: 1 Event Format: Buy

Template ID: T-ROYS Origin: 110 Lab Services Division

Template Type: Personal

Event Type: RFx [Change to Auction](#) [Delete](#)

Procurement Type: Goods and other services

Estimated Price: \$ 5,000 TO \$10,000

*Event Name: RFB - Lab Service Template Copy From:

Description:

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#) [Payment Terms and Contact Info](#)
[Event Comments and Attachments](#) [Event Constraints](#)

8. Click the **Template** Info button located at the bottom of the Event Summary page.
9. Enter a Description for your template in order to locate the template in the future.

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Modify an Event

Event Template Info

Business Unit: B0401 Template Type: Personal Template ID: T-ROYS

Description: RFB Template for Lab Svrc

Template Info

Status: Active

10. Click the **OK** button.
11. Click the **Save** Event button.
12. Optional – Click the Preview PDF button to send a copy of your template for your review.