



About Strategic Sourcing Collaboration:

Cardinal allows the Strategic Sourcing (SS) Buyer to select other Cardinal users, known as Collaborators, to participate in an event or in the bid analysis process.

While the event creator is usually the SS Buyer responsible for the event, the SS Buyer may not have all of the information that is critical to the event. Therefore, it is important for them to distribute the event to the stakeholders for input prior to posting the event. This also enables the event creator to get everyone's input into the event and ensure that everyone agrees on the overall objectives of the procurement.

Collaboration is also useful during bid analysis. By allowing stakeholders to review the bids and provide input on bid factor weightings, text based scoring and the like, the buyer can be certain that the interests of all the collaborators are factored in on the award decision. The system calculates an average score based on the input of all the collaborators.

Suggested changes by a Collaborator can be accepted or rejected by the SS Buyer. However, the event cannot be posted while collaborators are reviewing the event.

Collaborators may include customers (Cardinal users), supervisors, subject matter experts (SME), Evaluation Committee members, and others who have the Cardinal role of Event Collaborator.

For instructions on the strategic sourcing process and awarding events, refer to the course titled 501 PR345 Strategic Sourcing and the 501 PR 345 Strategic Sourcing Event Awards job aid.

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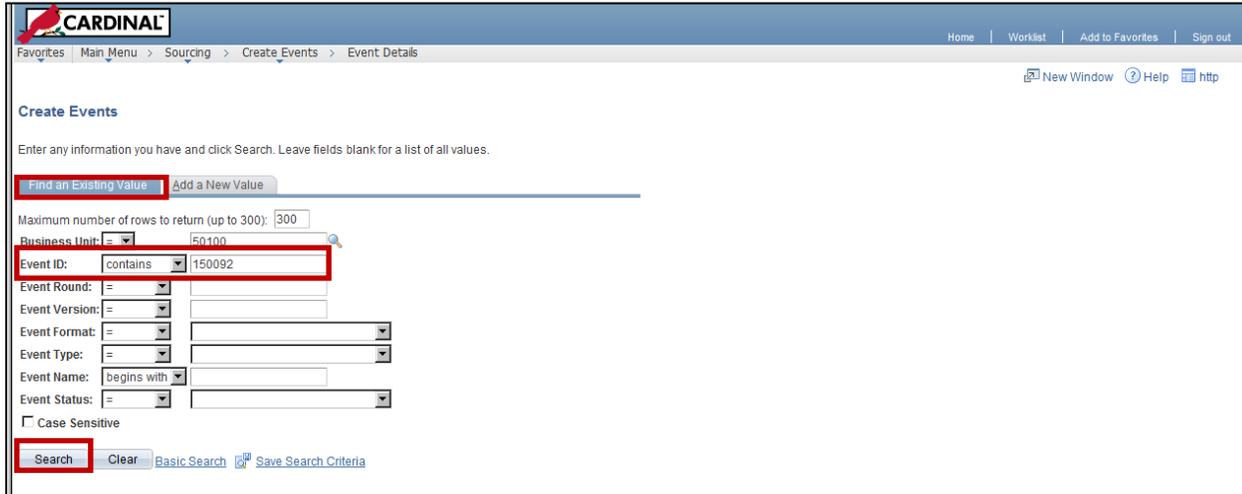
Event Collaboration

Invite Event Collaborators (SS Buyer)

The SS Buyer selects users with the Event Collaborator role and adds them to an event that is being created. Events do not route to managers, or other users, unless they are selected as a Collaborator. A routing sequence is established as you invite the Collaborators. You may modify the sequence to ensure the event is reviewed by the Collaborators in the order you wish.

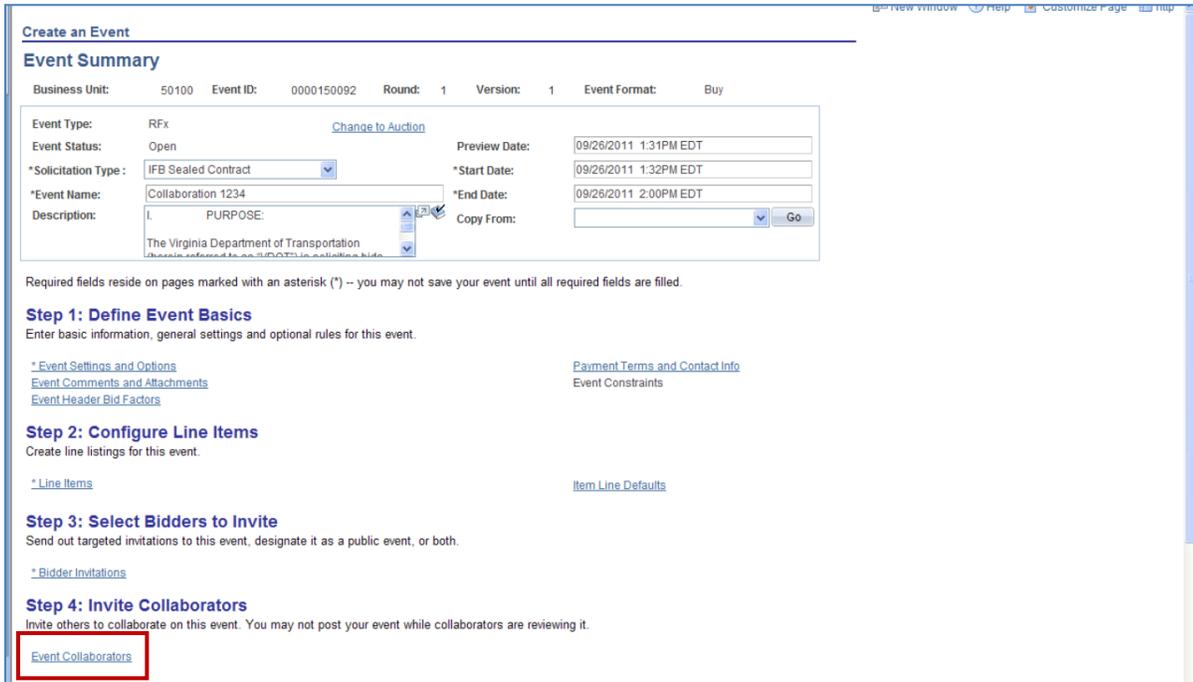
- 1 The event must be open for editing in order to invite collaborators. To open the event, navigate to the **Create Events** page using the following path:

**Main Menu > Sourcing > Create Events > Event Details**



The screenshot shows the 'Create Events' page in the CARDINAL system. The breadcrumb navigation is 'Main Menu > Sourcing > Create Events > Event Details'. The page has a search bar with two tabs: 'Find an Existing Value' (highlighted in red) and 'Add a New Value'. Below the search bar, there is a text input for 'Maximum number of rows to return (up to 300): 300'. The search criteria section includes several dropdown menus: 'Business Unit' (set to 50100), 'Event ID' (set to 'contains' and '150092', highlighted in red), 'Event Round', 'Event Version', 'Event Format', 'Event Type', 'Event Name' (set to 'begins with'), and 'Event Status'. There is also a 'Case Sensitive' checkbox which is unchecked. At the bottom of the search criteria, there is a 'Search' button (highlighted in red), a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

- 2 Click on the **Find an Existing Value** tab to find and open an existing event.
- 3 The **Business Unit** field will default, do not change this value.
- 4 Enter search criteria, such as **Event ID**, for the event.
- 5 Click on the **Search** button. The **Create an Event – Event Summary** page displays.



**Create an Event**

**Event Summary**

Business Unit: 50100 Event ID: 0000150092 Round: 1 Version: 1 Event Format: Buy

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

Event Status: Open Preview Date: 09/26/2011 1:31PM EDT

\*Solicitation Type: IFB Sealed Contract \*Start Date: 09/26/2011 1:32PM EDT

\*Event Name: Collaboration 1234 \*End Date: 09/26/2011 2:00PM EDT

Description: I. PURPOSE: The Virginia Department of Transportation

Copy From:

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](#)  
[Event Header Bid Factors](#)

**Step 2: Configure Line Items**  
Create line listings for this event.

[\\* Line Items](#) [Item Line Defaults](#)

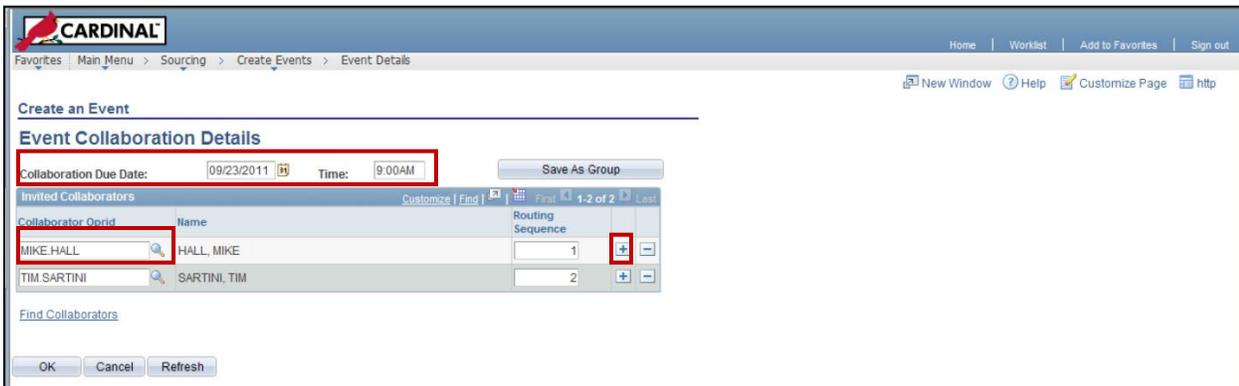
**Step 3: Select Bidders to Invite**  
Send out targeted invitations to this event, designate it as a public event, or both.

[\\* Bidder Invitations](#)

**Step 4: Invite Collaborators**  
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#)

- 6 Click on the **Event Collaborators** hyperlink. The **Create an Event – Event Collaboration Details** page displays.



**Create an Event**

**Event Collaboration Details**

Collaboration Due Date: 09/23/2011 Time: 9:00AM

Collaborator Oprid	Name	Routing Sequence
MIKE.HALL	HALL, MIKE	1
TIM.SARTINI	SARTINI, TIM	2

[Find Collaborators](#)

- 7 In the **Collaboration Due Date** field, enter a deadline date and time for all collaboration to end. The **Collaboration Due Date** must be prior to the event Preview Date.
- 8 In the **Collaborator Oprid** field, enter the name of the user you wish to invite to collaborate on the event. You can use the magnifying glass **Look up Collaborator Oprid** icon, if needed, to find a user. If you have previously set up a **Collaborator Group** you may access the group by clicking on the **Find Collaborators** hyperlink.
- 9 Click the **Add a new row at row x** icon (+) at the end of the row to add another Collaborator. Use the **Delete row X** icon (-) to remove a Collaborator.
- 10 The **Routing Sequence** number is automatically populated as you select the Collaborators. You may modify the sequence to ensure the event is reviewed by the Collaborators in the order you wish.

Favorites | Main Menu > Sourcing > Create Events > Event Details

**Modify an Event**

**Event Collaboration Details**

Collaboration Due Date: 09/02/2016  Time: 11:25AM  **Save As Group**

Analysis Collab Due Date

Invited Collaborators			
Collaborator Oprid	Name	Routing Sequence	
JAMES.HALL	HALL, JAMES	2	+ -
A.HETZER	Hetzer, Andy (VDOT)	1	+ -

[Find Collaborators](#)

OK Cancel Refresh

- 11 If you wish to save the selected Collaborators as a group for future use, click the **Save As Group** button. Two new fields, **Collaboration Group** and **Description**, appear and the **Save As Group** button is grayed out.

Favorites | Main Menu > Sourcing > Create Events > Event Details

**Modify an Event**

**Event Collaboration Details**

Collaboration Due Date: 09/02/2016  Time: 11:25AM  **Save As Group**

**Collaboration Group:** Stone Bidders

**Description:** Stone Bidders

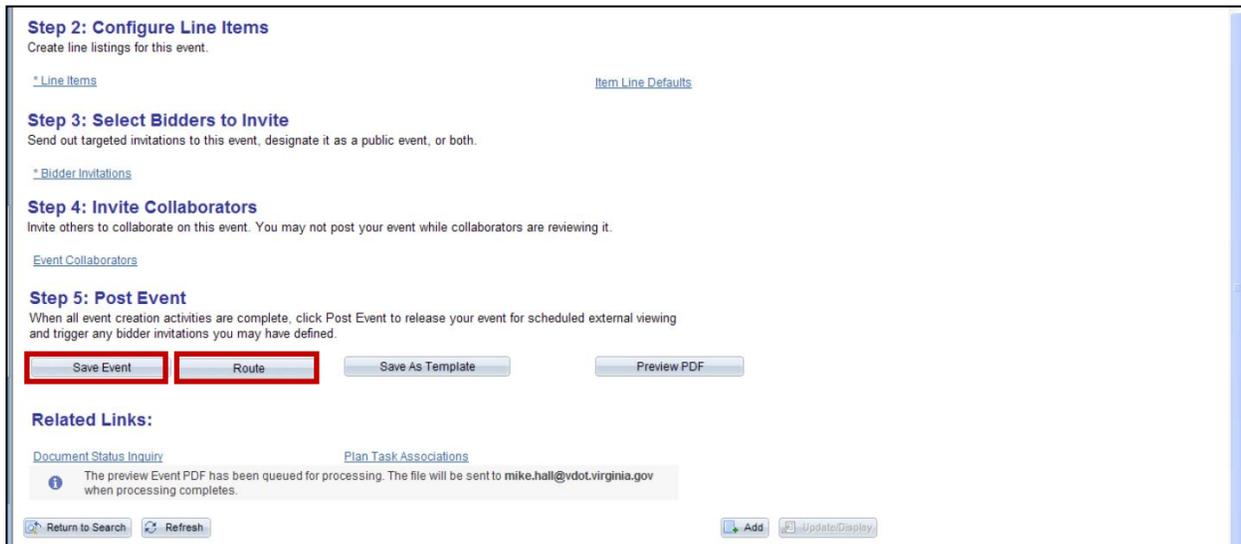
Analysis Collab Due Date

Invited Collaborators			
Collaborator Oprid	Name	Routing Sequence	
A-PETER.MCGARRITY	McGarrity, A-Peter (VDOT)	1	+ -
A.HETZER	Hetzer, Andy (VDOT)	2	+ -

[Find Collaborators](#)

**OK** Cancel Refresh

- 12 Enter a group name in the **Collaboration Group** field.
- 13 Enter a brief description of your group in the **Description** field.
- 14 Once you have entered all the collaborators, click the **OK** button. Your group is now available for future use and the Collaborators have been added to the event. The **Modify an Event – Event Collaboration Details** page displays.



The screenshot displays a web interface for configuring an event. It is divided into five numbered steps:

- Step 2: Configure Line Items** - Create line listings for this event. Includes a link for [Item Line Defaults](#).
- Step 3: Select Bidders to Invite** - Send out targeted invitations to this event, designate it as a public event, or both. Includes a link for [Bidder Invitations](#).
- Step 4: Invite Collaborators** - Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it. Includes a link for [Event Collaborators](#).
- Step 5: Post Event** - When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

At the bottom of the configuration area, there are four buttons: **Save Event** (highlighted with a red border), **Route** (highlighted with a red border), **Save As Template**, and **Preview PDF**.

Below the buttons is a **Related Links:** section with links for [Document Status Inquiry](#) and [Plan Task Associations](#). A notification box states: "The preview Event PDF has been queued for processing. The file will be sent to [mike.hall@vdot.virginia.gov](mailto:mike.hall@vdot.virginia.gov) when processing completes." At the very bottom, there are navigation buttons: [Return to Search](#), [Refresh](#), [Add](#), and [Update/Deploy](#).

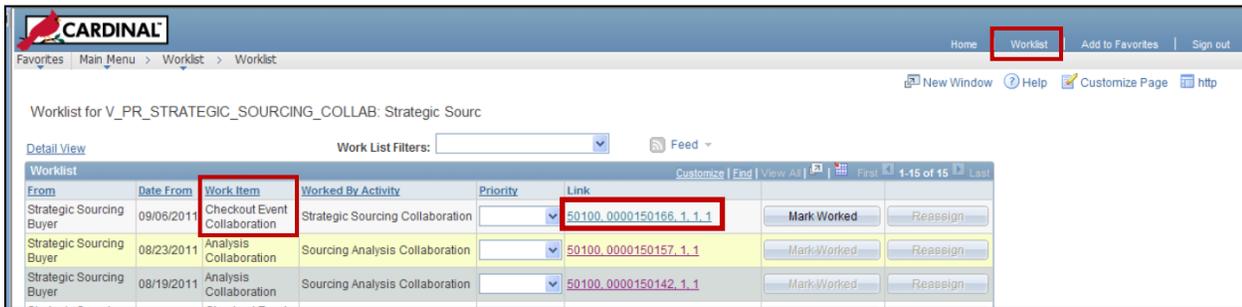
- 15 Click the **Save Event** button. The page looks the same but the title of the page has updated to **Modify an Event – Event Summary** page. The **Event Status** is **Open**.
- 16 Click **Route** to send the event to the first collaborator. An email notification is sent to each Collaborator and an item is added to each Collaborator's worklist. The **Event Status** changes to **Collaborating Event** and the **Collaboration Status** is set to **Available for Checkout** on the **Workbench**. The **Save Event** and **Route** buttons are grayed out.
- 17 As the event creator, you will receive a message when all collaboration is complete.

## Collaborate on an Event

The system sends an email notification to all invited collaborators on an event. The first collaborator receives a worklist entry immediately; the rest of the collaborators receive a worklist entry once the current collaborator completes his or her collaboration input based on the routing sequence entered. Collaborators check out an event through the Event Workbench, make any changes, and then route the event to the next collaborator. Once the collaboration is done, the system notifies the event creator by email and worklist entry.

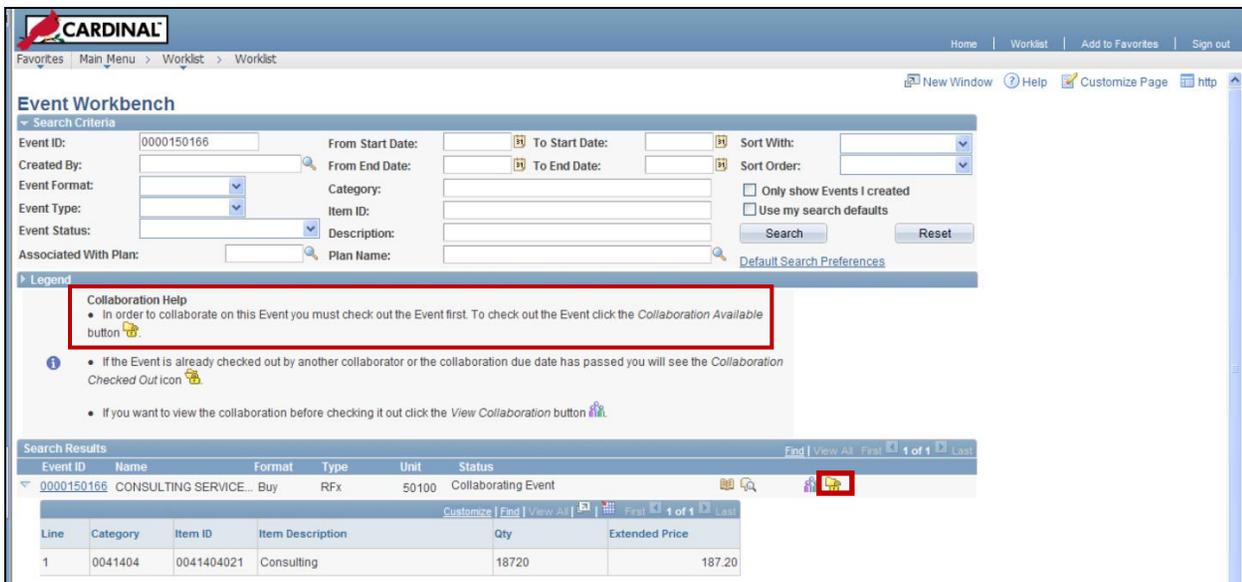
As an **Event Collaborator**, to access the event you have multiple options:

- Click on the **Collaborate on this event** hyperlink in the email notification you received, or
  - Click on the event hyperlink, i.e. **Link**, from your **Worklist**
- 1 As an **Event Collaborator** to access the event using your **Worklist**, from any Cardinal page, click on the **Worklist** hyperlink in the top right hand corner of the page. Your **Worklist** displays.



From	Date From	Work Item	Worked By Activity	Priority	Link		
Strategic Sourcing Buyer	09/06/2011	Checkout Event Collaboration	Strategic Sourcing Collaboration		50100.0000150166.1.1.1	Mark Worked	Reassign
Strategic Sourcing Buyer	08/23/2011	Analysis Collaboration	Sourcing Analysis Collaboration		50100.0000150157.1.1	Mark Worked	Reassign
Strategic Sourcing Buyer	08/19/2011	Analysis Collaboration	Sourcing Analysis Collaboration		50100.0000150142.1.1	Mark Worked	Reassign

- Under the **Work Item** column, the event will be listed as **Checkout Event Collaboration**. Click the **Link** column hyperlink on the row with the event you wish to collaborate on.
- The **Event Workbench** page displays for the selected event.



**Event Workbench**

Search Criteria

Event ID: 0000150166 From Start Date: To Start Date: Sort With:   
 Created By: From End Date: To End Date: Sort Order:   
 Event Format: Category:   
 Event Type: Item ID:   
 Event Status: Description:   
 Associated With Plan: Plan Name:   
 Only show Events I created   
 Use my search defaults   
 Search Reset   
 Default Search Preferences

Legend

**Collaboration Help**

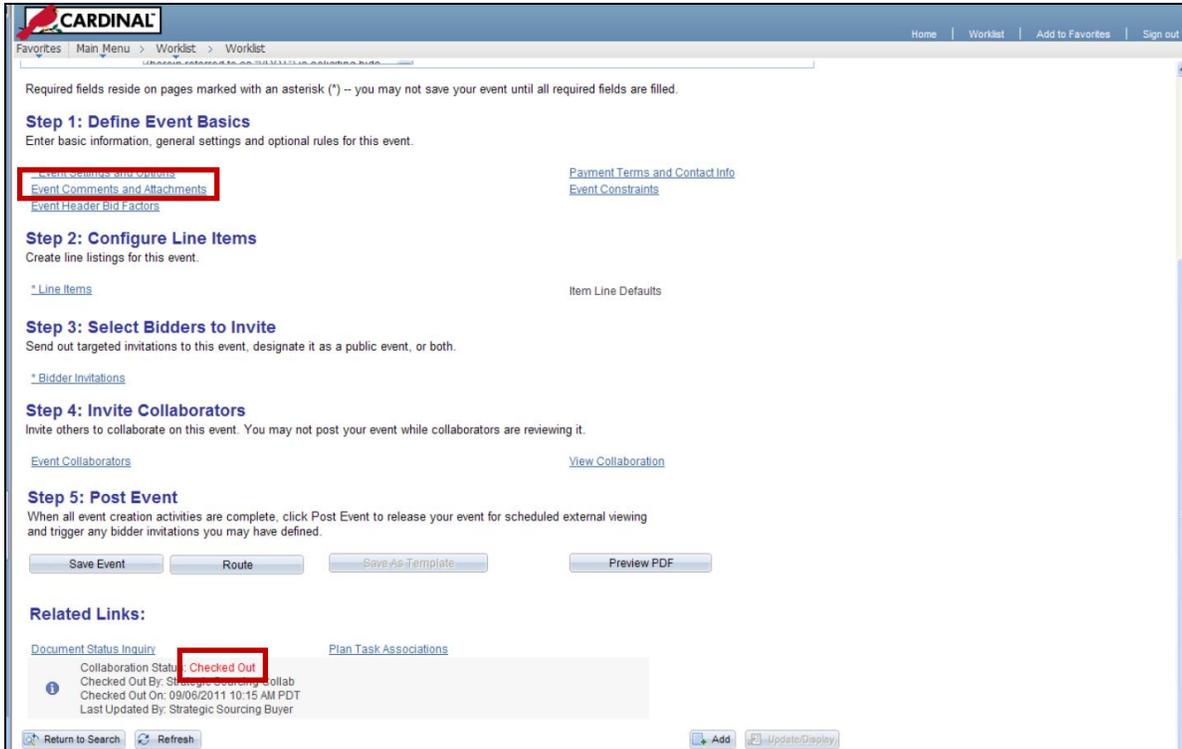
- In order to collaborate on this Event you must check out the Event first. To check out the Event click the **Collaboration Available** button.
- If the Event is already checked out by another collaborator or the collaboration due date has passed you will see the **Collaboration Checked Out** icon.
- If you want to view the collaboration before checking it out click the **View Collaboration** button.

Search Results

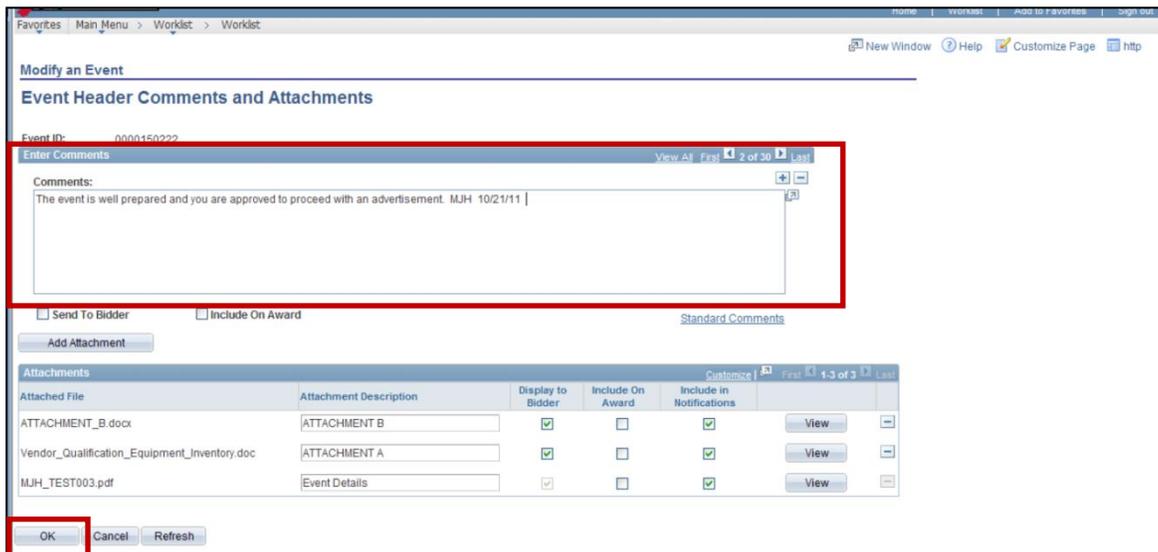
Event ID	Name	Format	Type	Unit	Status
0000150166	CONSULTING SERVICE...	Buy	RFX	50100	Collaborating Event

Line	Category	Item ID	Item Description	Qty	Extended Price
1	0041404	0041404021	Consulting	18720	187.20

- To collaborate on the event, click the **Collaboration Available (Available for checkout)** icon. The **Modify an Event – Event Summary** page displays.
- Note: On the **Event Workbench** page, depending on the stage of the event, the collaboration countdown time is displayed in the **Status** field.

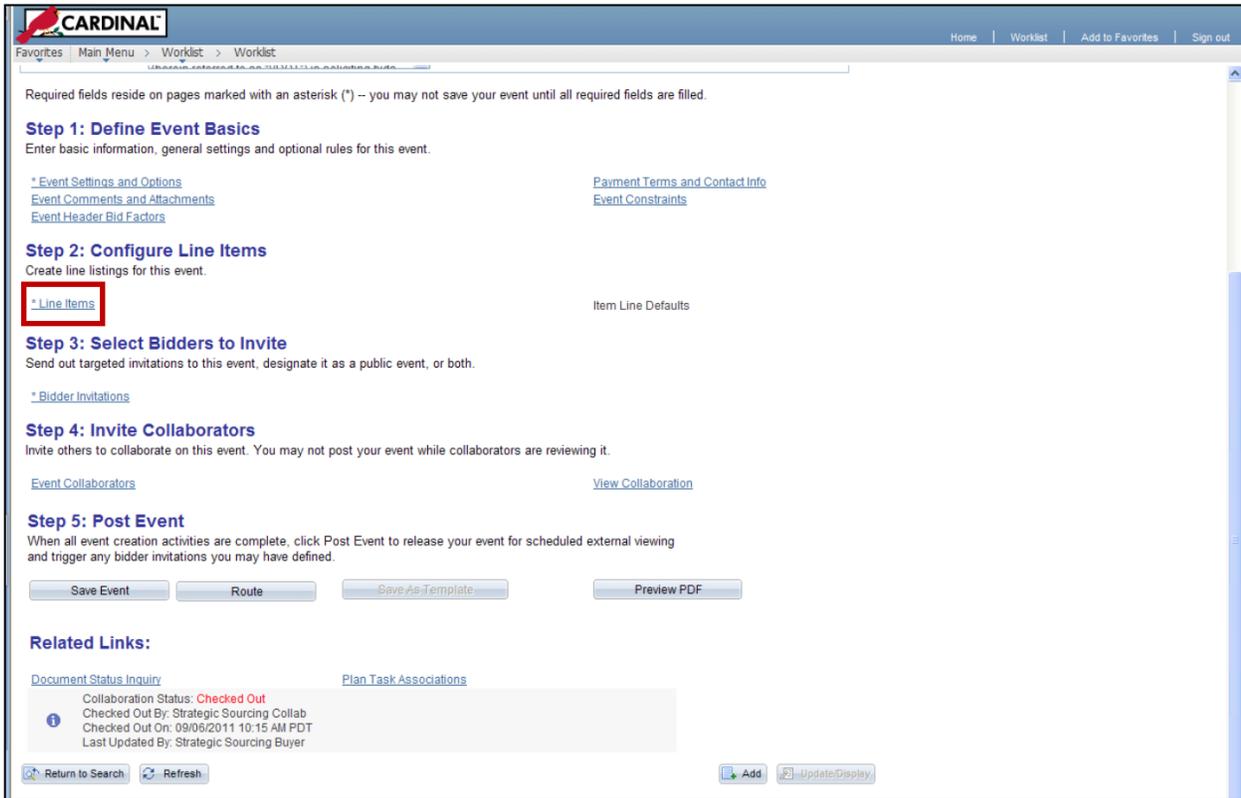


- 6 On the **Modify an Event – Event Summary** page you see that the **Collaboration Status** is **Checked Out** along with details about the check out, such as when and by whom.
- 7 To make edits or add comments, click the **Event Comments and Attachments** hyperlink under **Step 1**.



Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	View
ATTACHMENT_B.docx	ATTACHMENT B	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View
Vendor_Qualification_Equipment_Inventory.doc	ATTACHMENT A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View
MJH_TEST003.pdf	Event Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View

- 8 Enter your comments in the **Comments** box.
- 9 Click the **OK** button. The **Modify an Event – Event Summary** page displays.



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](#)  
[Event Header Bid Factors](#)

**Step 2: Configure Line Items**  
Create line listings for this event.

[Line Items](#) Item Line Defaults

**Step 3: Select Bidders to Invite**  
Send out targeted invitations to this event, designate it as a public event, or both.

\* [Bidder Invitations](#)

**Step 4: Invite Collaborators**  
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#) [View Collaboration](#)

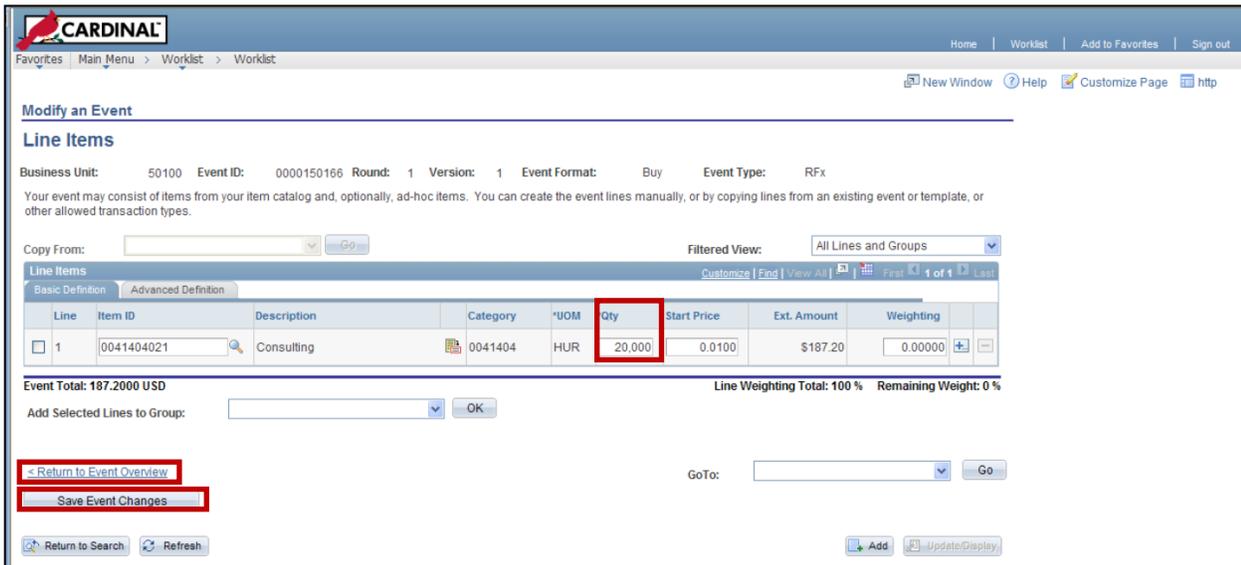
**Step 5: Post Event**  
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

**Related Links:**

[Document Status Inquiry](#) [Plan Task Associations](#)

Collaboration Status: **Checked Out**  
 Checked Out By: Strategic Sourcing Collab  
 Checked Out On: 09/06/2011 10:15 AM PDT  
 Last Updated By: Strategic Sourcing Buyer

10 To modify event lines, click the **Line Items** hyperlink under **Step 2**. The **Modify an Event – Line Items** page displays.



**Modify an Event**

**Line Items**

Business Unit: 50100 Event ID: 0000150166 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From:   Filtered View: All Lines and Groups

Line	Item ID	Description	Category	UOM	Qty	Start Price	Ext. Amount	Weighting
1	0041404021	Consulting	0041404	HUR	20,000	0.0100	\$187.20	0.00000

Event Total: 187.2000 USD Line Weighting Total: 100 % Remaining Weight: 0 %

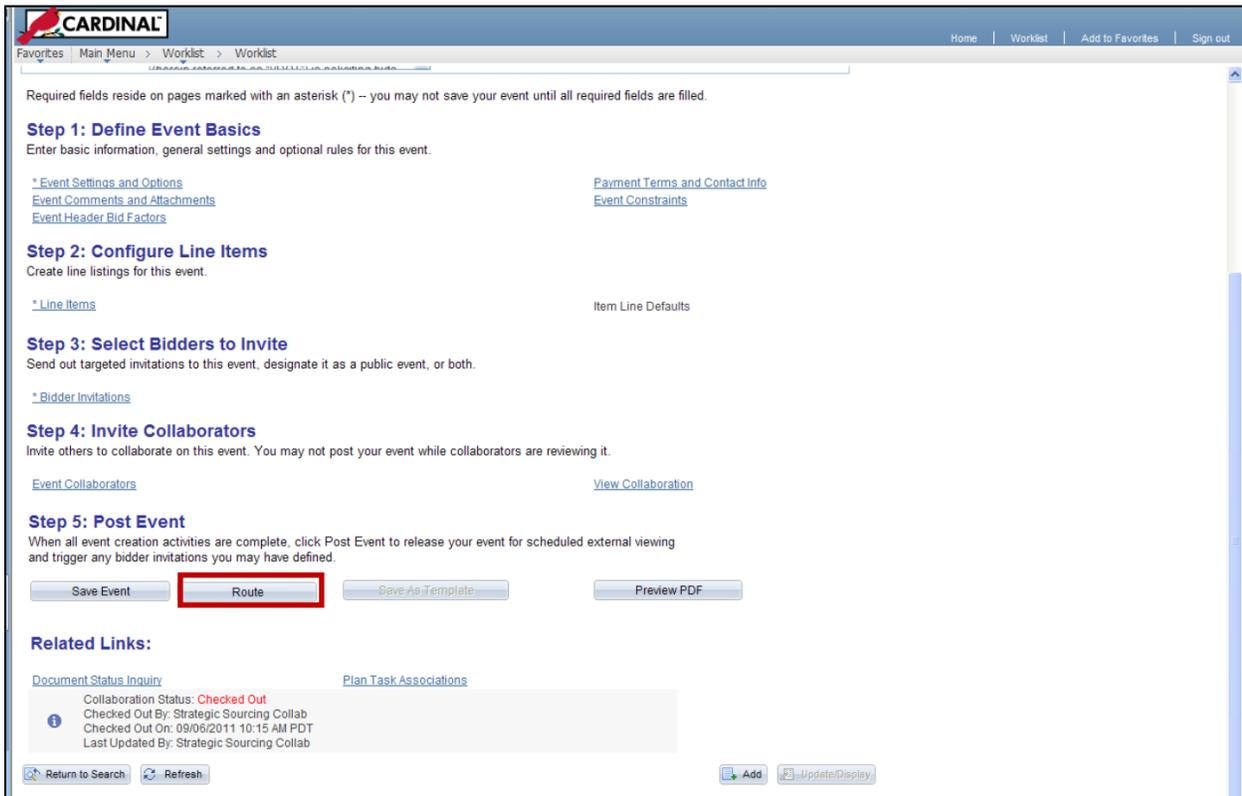
Add Selected Lines to Group:

[Return to Event Overview](#)

11 You may update the **Qty** field, i.e., line quantity, for each line if needed.

12 After you have made the line edits, click the **Save Event Changes** button.

13 Click the **Return to Event Overview** hyperlink. The **Modify an Event – Event Summary** page displays.



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](#)  
[Event Header Bid Factors](#)

**Step 2: Configure Line Items**  
Create line listings for this event.

[\\* Line Items](#) [Item Line Defaults](#)

**Step 3: Select Bidders to Invite**  
Send out targeted invitations to this event, designate it as a public event, or both.

[\\* Bidder Invitations](#)

**Step 4: Invite Collaborators**  
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#) [View Collaboration](#)

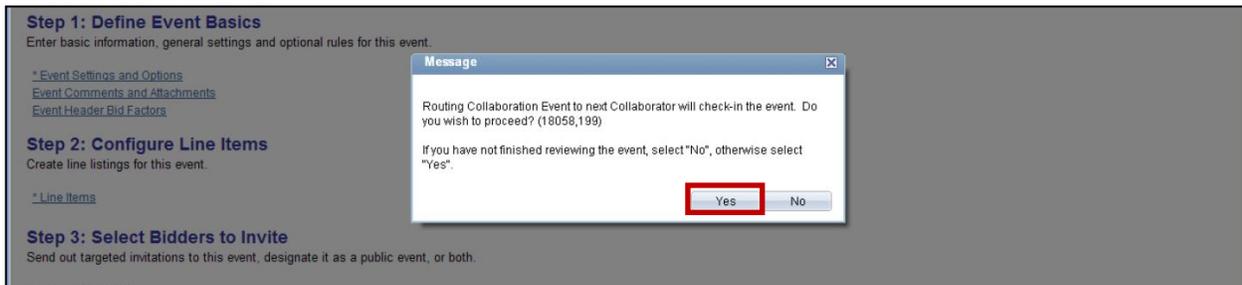
**Step 5: Post Event**  
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

**Related Links:**

[Document Status Inquiry](#) [Plan Task Associations](#)

Collaboration Status: **Checked Out**  
Checked Out By: Strategic Sourcing Collab  
Checked Out On: 09/06/2011 10:15 AM PDT  
Last Updated By: Strategic Sourcing Collab

- 14 Click the **Route** button to send the event on to the next Collaborator. This routing is based on the routing sequence the event creator previously defined. A routing confirmation message will be displayed.



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

[\\* Event Settings and Options](#)  
[Event Comments and Attachments](#)  
[Event Header Bid Factors](#)

**Step 2: Configure Line Items**  
Create line listings for this event.

[\\* Line Items](#)

**Step 3: Select Bidders to Invite**  
Send out targeted invitations to this event, designate it as a public event, or both.

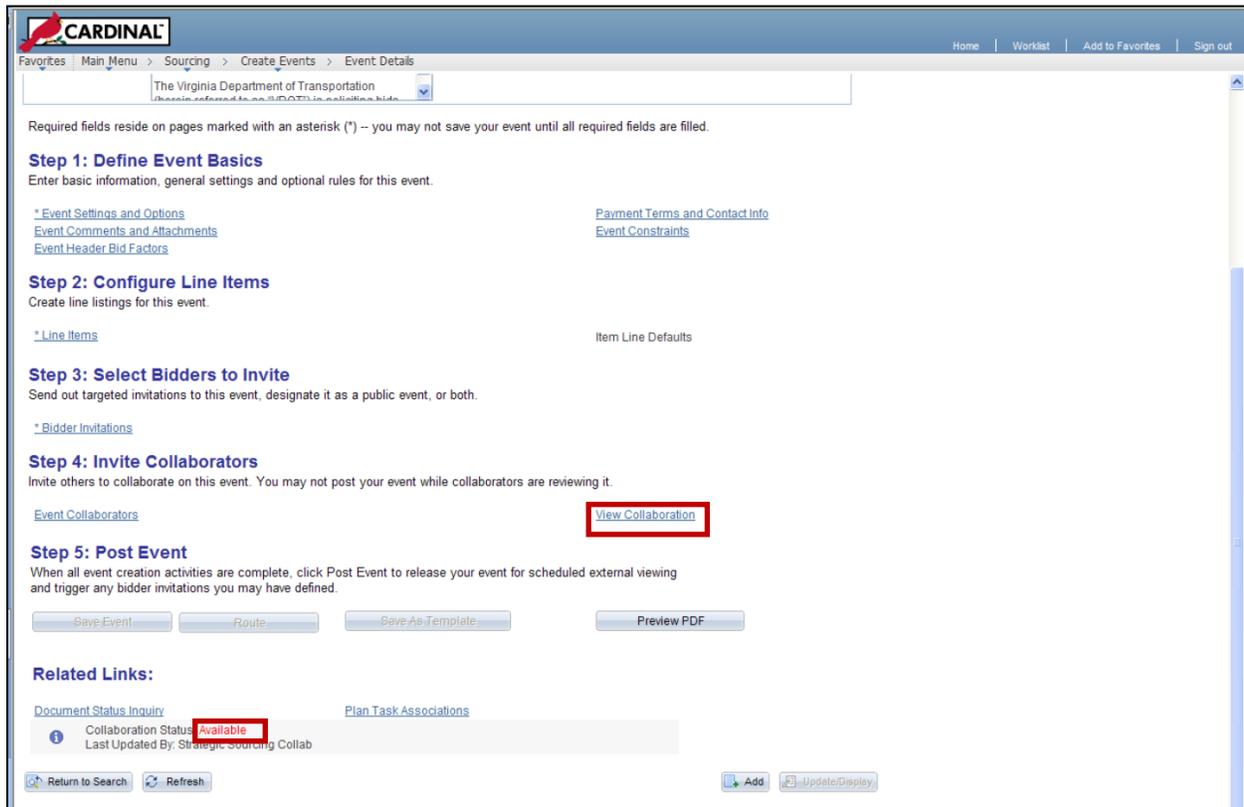
[\\* Bidder Invitations](#)

**Message**

Routing Collaboration Event to next Collaborator will check-in the event. Do you wish to proceed? (18058,199)

If you have not finished reviewing the event, select "No", otherwise select "Yes".

- 15 To check in the event and send it on to the next Collaborator, click the **Yes** button. The **Modify an Event – Event Summary** page displays.



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](#)  
[Event Header Bid Factors](#)

### Step 2: Configure Line Items

Create line listings for this event.

[\\* Line Items](#) [Item Line Defaults](#)

### Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

[\\* Bidder Invitations](#)

### Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#) [View Collaboration](#)

### Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

[Save Event](#) [Route](#) [Save As Template](#) [Preview PDF](#)

#### Related Links:

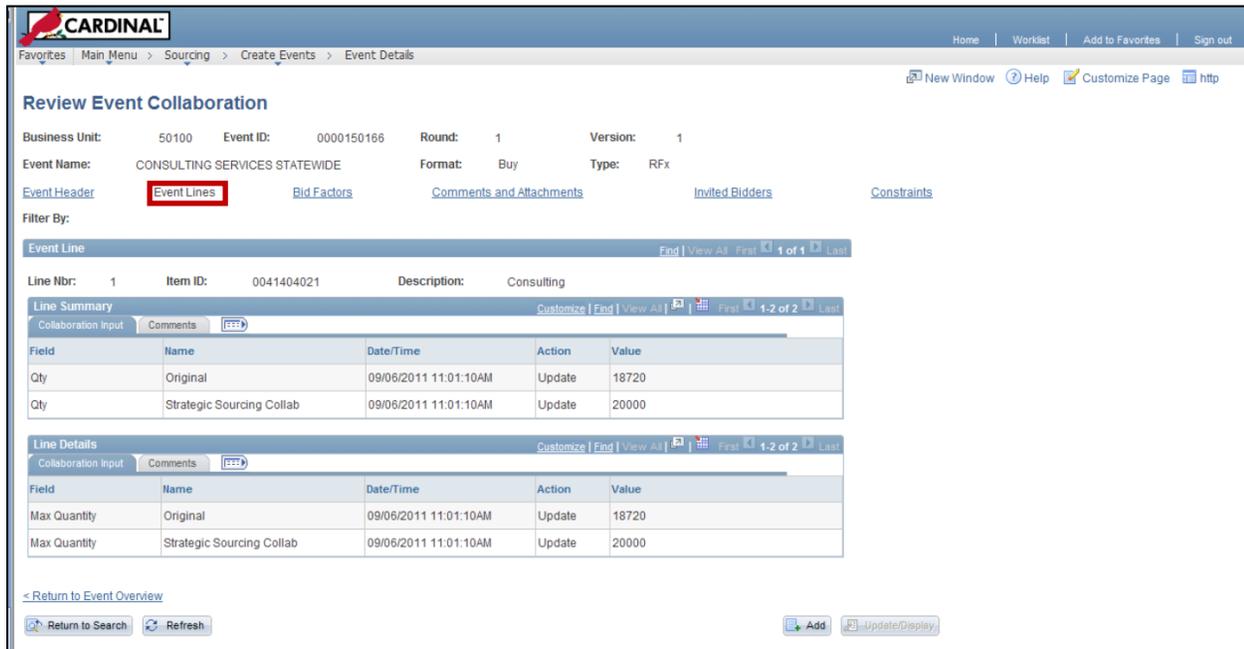
[Document Status Inquiry](#) [Plan Task Associations](#)

**Collaboration Status: Available**  
Last Updated By: Strategic Sourcing Collab

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

**16** The event's **Collaboration Status** updates to **Available**.

**17** You may click the **View Collaboration** hyperlink to see any collaboration changes and comments.



**Review Event Collaboration**

Business Unit: 50100 Event ID: 0000150166 Round: 1 Version: 1  
 Event Name: CONSULTING SERVICES STATEWIDE Format: Buy Type: RFx

Event Header | **Event Lines** | Bid Factors | Comments and Attachments | Invited Bidders | Constraints

Filter By:

Event Line Find | View All | First 1 of 1 Last

Line Nbr: 1 Item ID: 0041404021 Description: Consulting

Line Summary Customize | Find | View All | First 1-2 of 2 Last

Field	Name	Date/Time	Action	Value
Qty	Original	09/06/2011 11:01:10AM	Update	18720
Qty	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000

Line Details Customize | Find | View All | First 1-2 of 2 Last

Field	Name	Date/Time	Action	Value
Max Quantity	Original	09/06/2011 11:01:10AM	Update	18720
Max Quantity	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000

< Return to Event Overview

Return to Search Refresh Add Update/Display

- 18 Click the **Event Lines** hyperlink to view the original amount and any changes to the quantity by Collaborators.
- 19 Click the **Event Comments and Attachments** hyperlink to view any comments by Collaborators.



Event Header | Event Lines | Bid Factors | **Comments and Attachments** | Invited Bidders | Constraints

Filter By:

Event Comments and Attachments Customize | Find | View All | First 1 of 1 Last

Field	Name	Date/Time	Action	Value
Comments	Strategic Sourcing Collab	10/21/2011 10:59:37AM	Add	The event is well prepared and you are approved to proceed with an advertisement. MJH 10/21/11

Event Line Find | View All | First 1 of 1 Last

Line Nbr: Item ID: Description:

Comments and Attachments Customize | Find | View All | First 1 of 1 Last

Field	Name	Date/Time	Action	Value

< Return to Event Overview

Return to Search Refresh Add Update/Display

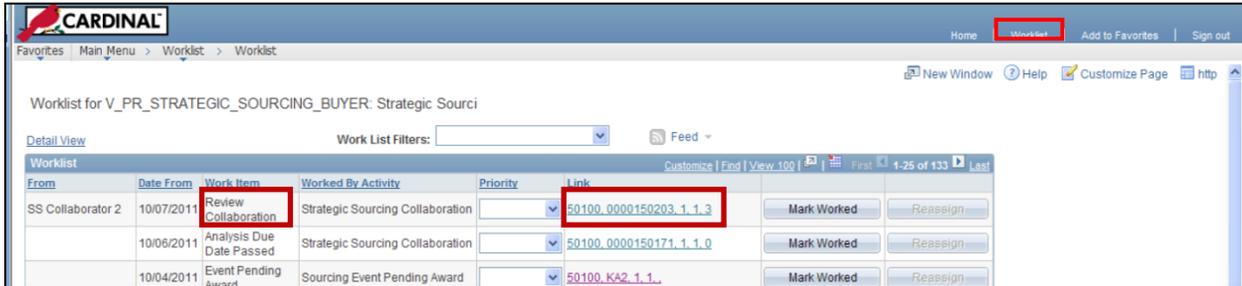
- 20 Once all Collaborators have completed their review, an email notification and a worklist item are sent to the SS Buyer, i.e., event creator, indicating that collaboration has been completed by all Collaborators.

### Review Event Collaboration (SS Buyer)

To review collaboration on an event, the SS Buyer has multiple options:

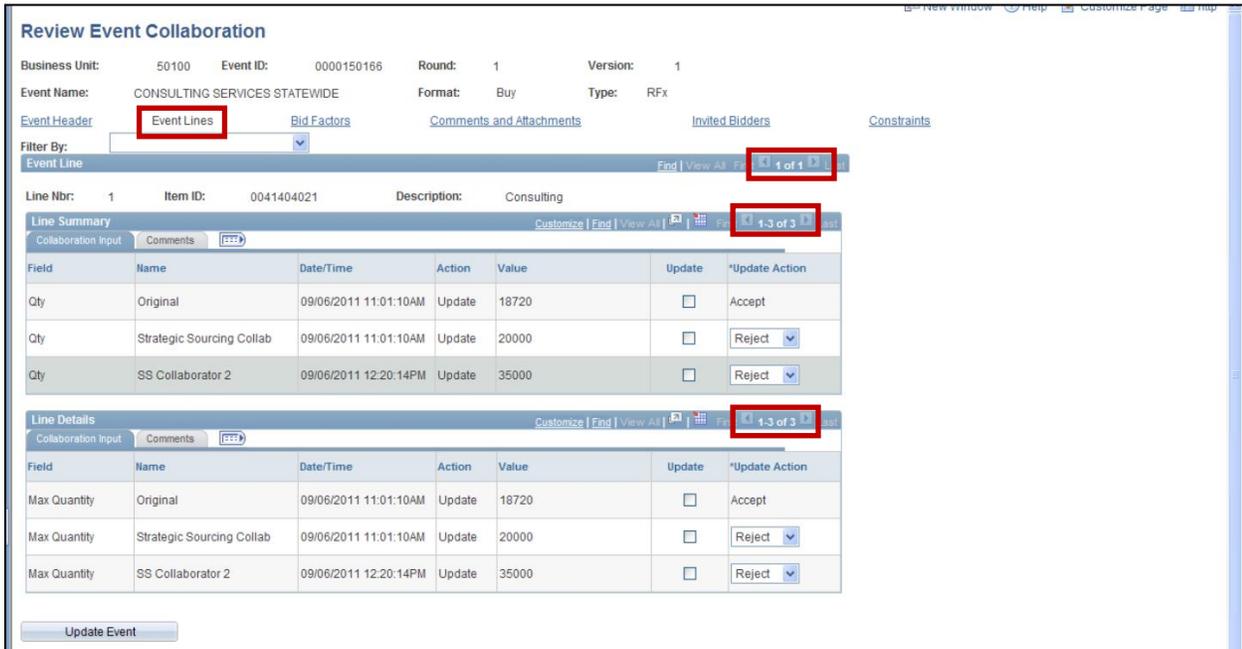
- Click on the **Review the completed collaboration** hyperlink in the email notification you received, or
- Click on the event hyperlink, i.e. **Link**, from your **Worklist**

**1** To access the event using your **Worklist**, from any Cardinal page, click on the **Worklist** hyperlink in the top right hand corner of the page. Your **Worklist** displays.



From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
SS Collaborator 2	10/07/2011	Review Collaboration	Strategic Sourcing Collaboration		50100_0000150203.1.1.3	Mark Worked	Reassign
	10/06/2011	Analysis Due Date Passed	Strategic Sourcing Collaboration		50100_0000150171.1.1.0	Mark Worked	Reassign
	10/04/2011	Event Pending award	Sourcing Event Pending Award		50100_KA2.1.1..	Mark Worked	Reassign

**2** Under the **Work Item** column, the event will be listed as **Review Collaboration**. Click the **Link** column hyperlink on the row with the event that has the collaboration you wish to review. The **Review Event Collaboration** page displays for the selected event.



**Review Event Collaboration**

Business Unit: 50100    Event ID: 0000150166    Round: 1    Version: 1

Event Name: CONSULTING SERVICES STATEWIDE    Format: Buy    Type: RFx

Event Header    **Event Lines**    Bid Factors    Comments and Attachments    Invited Bidders    Constrains

Filter By: [dropdown]

Event Line    Find | View All | 1 of 1

Line Nbr: 1    Item ID: 0041404021    Description: Consulting    1-3 of 3

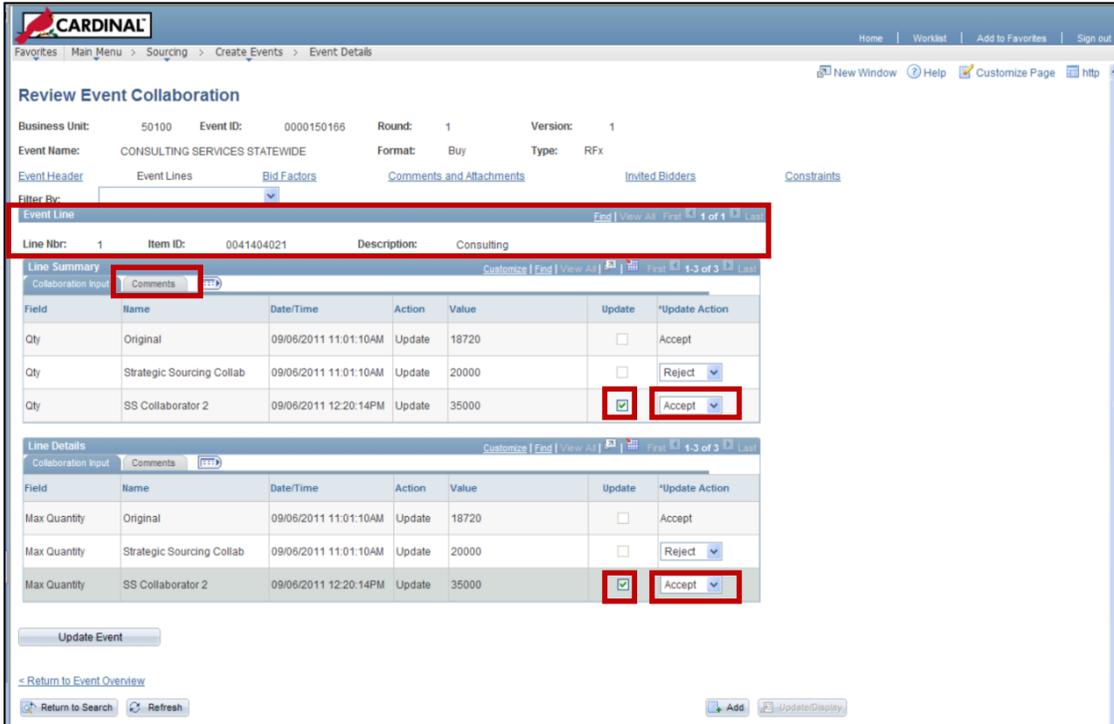
Field	Name	Date/Time	Action	Value	Update	*Update Action
Qty	Original	09/06/2011 11:01:10AM	Update	18720	<input type="checkbox"/>	Accept
Qty	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000	<input type="checkbox"/>	Reject
Qty	SS Collaborator 2	09/06/2011 12:20:14PM	Update	35000	<input type="checkbox"/>	Reject

Line Details    1-3 of 3

Field	Name	Date/Time	Action	Value	Update	*Update Action
Max Quantity	Original	09/06/2011 11:01:10AM	Update	18720	<input type="checkbox"/>	Accept
Max Quantity	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000	<input type="checkbox"/>	Reject
Max Quantity	SS Collaborator 2	09/06/2011 12:20:14PM	Update	35000	<input type="checkbox"/>	Reject

Update Event

**3** Click the **Event Lines** hyperlink to view the edits and/or comments entered by each collaborator.



**Review Event Collaboration**

Business Unit: 50100 Event ID: 0000150166 Round: 1 Version: 1  
 Event Name: CONSULTING SERVICES STATEWIDE Format: Buy Type: RFx

Event Header | Event Lines | Bid Factors | Comments and Attachments | Invited Bidders | Constrains

Filter By: [dropdown]

**Event Line** | Page 1 of 1

Line Nbr:	Item ID:	Description:
1	0041404021	Consulting

**Line Summary** | Comments | [dropdown]

Field	Name	Date/Time	Action	Value	Update	Update Action
Qty	Original	09/06/2011 11:01:10AM	Update	18720	<input type="checkbox"/>	Accept
Qty	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000	<input type="checkbox"/>	Reject
Qty	SS Collaborator 2	09/06/2011 12:20:14PM	Update	35000	<input checked="" type="checkbox"/>	Accept

**Line Details** | Comments | [dropdown]

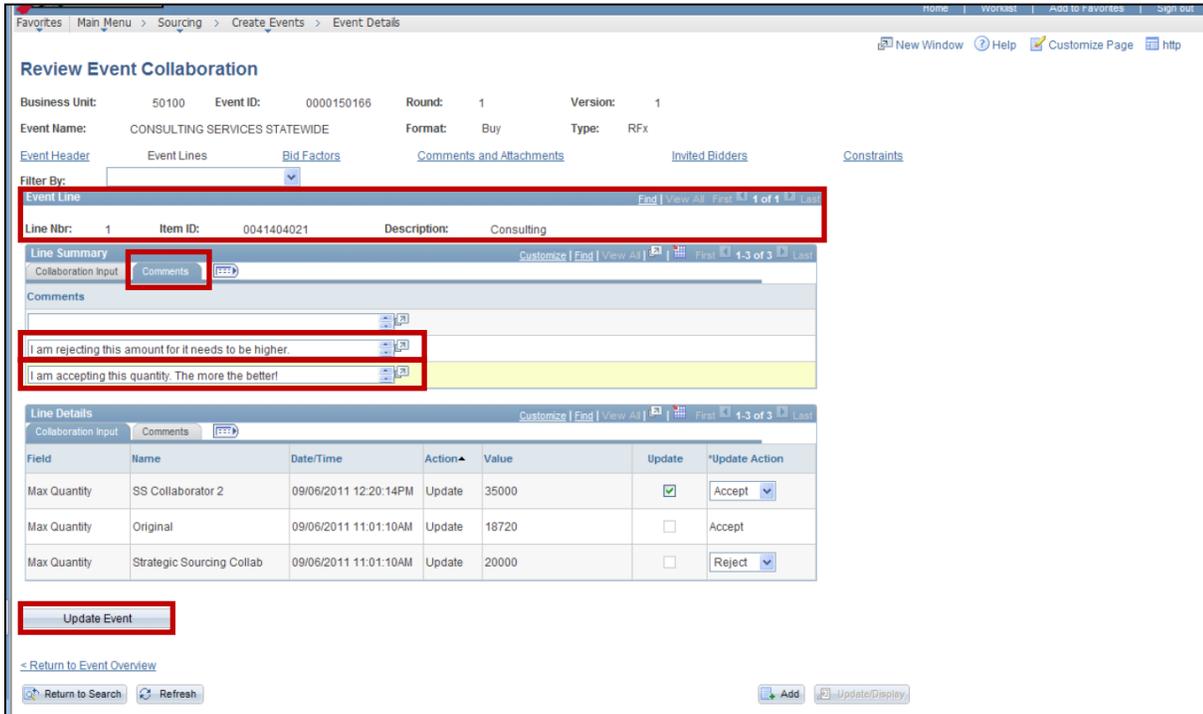
Field	Name	Date/Time	Action	Value	Update	Update Action
Max Quantity	Original	09/06/2011 11:01:10AM	Update	18720	<input type="checkbox"/>	Accept
Max Quantity	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000	<input type="checkbox"/>	Reject
Max Quantity	SS Collaborator 2	09/06/2011 12:20:14PM	Update	35000	<input checked="" type="checkbox"/>	Accept

Update Event

[Return to Event Overview](#)

[Return to Search](#) [Refresh](#) [Add](#) [Update Display](#)

- 4 Review and accept or reject Collaborator edits for each **Event Line**. Use the **Show next row** and **Show previous row** icons, i.e., left and right arrows, to scroll through the lines.
- 5 To accept or reject a change, check the **Update** box and change the **Update Action** field to **Accept** or **Reject** in both the **Line Summary** and **Line Details** sections.
- 6 Click on the **Comments** tab.



**Review Event Collaboration**

Business Unit: 50100 Event ID: 0000150166 Round: 1 Version: 1  
 Event Name: CONSULTING SERVICES STATEWIDE Format: Buy Type: RFx

Event Header | Event Lines | Bid Factors | Comments and Attachments | Invited Bidders | Constraints

Filter By: [Dropdown]

**Event Line**

Line Nbr: 1 Item ID: 0041404021 Description: Consulting

**Line Summary**

Collaboration Input | **Comments**

Comments

I am rejecting this amount for it needs to be higher.

I am accepting this quantity. The more the better!

**Line Details**

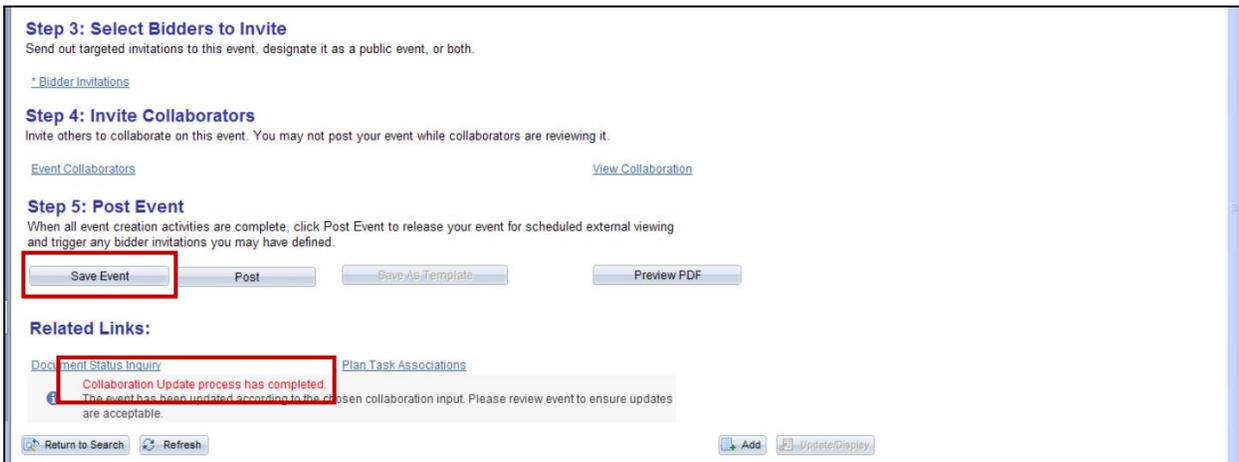
Field	Name	Date/Time	Action	Value	Update	Update Action
Max Quantity	SS Collaborator 2	09/06/2011 12:20:14PM	Update	35000	<input checked="" type="checkbox"/>	Accept
Max Quantity	Original	09/06/2011 11:01:10AM	Update	18720	<input type="checkbox"/>	Accept
Max Quantity	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000	<input type="checkbox"/>	Reject

**Update Event**

< Return to Event Overview

Return to Search Refresh Add Update/Display

- 7 Enter comments as applicable.
- 8 Repeat the previous steps for each **Event Line**.
- 9 Once all collaboration has been either accepted or rejected, and comments added, click the **Update Event** button. The **Review Event Collaboration** page displays.



**Step 3: Select Bidders to Invite**

Send out targeted invitations to this event, designate it as a public event, or both.

\* Bidder Invitations

**Step 4: Invite Collaborators**

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

Event Collaborators | View Collaboration

**Step 5: Post Event**

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

**Save Event** Post Save As Template Preview PDF

**Related Links:**

Document Status Inquiry | Plan Task Associations

Collaboration Update process has completed.  
 The event has been updated according to the chosen collaboration input. Please review event to ensure updates are acceptable.

Return to Search Refresh Add Update/Display

- 10 The event is saved and the status changes to **Collaboration Update process has completed**.
- 11 Click the **Save Event** button.

**Step 2: Configure Line Items**  
Create line listings for this event.

[\\* Line Items](#) Item Line Defaults

**Step 3: Select Bidders to Invite**  
Send out targeted invitations to this event, designate it as a public event, or both.

[\\* Bidder Invitations](#)

**Step 4: Invite Collaborators**  
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#) [View Collaboration](#)

**Step 5: Post Event**  
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

**Related Links:**

[Document Status Inquiry](#)
[Plan Task Associations](#)

Collaboration Status: Available  
Last Updated By: Neher, Cynthia (VDOT)

12 The **Collaboration Status** updates to **Available**.

13 To review the changes made to the event, click the **View Collaboration** hyperlink. The **Review Event Collaboration** page displays.

**Review Event Collaboration**

Business Unit: 50100 Event ID: 0000150166 Round: 1 Version: 1

Event Name: CONSULTING SERVICES STATEWIDE Format: Buy Type: RFx

[Event Header](#)
[Event Lines](#)
[Bid Factors](#)
[Comments and Attachments](#)
[Invited Bidders](#)
[Constraints](#)

Filter By:

Event Comments and Attachments Customize | Find | View All | 1-2 of 2 | last

Field	Name	Date/Time	Action	Value	Update	Update Action
Comments	Original	09/06/2011 1:21:44PM	Update	III. GENERAL: For the purpose of clarification, each firm receiving this Invitation for Bid is referred to as a "Bidder" and the Bidder awarded the contract to supply the services is referred to as a "Contractor". Virginia Department of Transportatio	<input type="checkbox"/>	Accept
Comments	SS Collaborator 2	09/06/2011 1:21:44PM	Update	COLLABORATIONS HERE XCXCXDXCXD III. GENERAL: For the purpose of clarification, each firm receiving this Invitation for Bid is referred to as a "Bidder" and the Bidder awarded the contract to supply the services is referred to as a "Contractor".	<input type="checkbox"/>	Reject

14 By clicking on one of the hyperlinks at the top of the page, **Event Header**, **Event Lines**, **Bid Factors** and **Comments and Attachments**, you can review the specific changes.

15 The collaboration actions are displayed with the action taken in the **Update Action** field.

16 The event can be posted for advertisement following the normal strategic sourcing process.

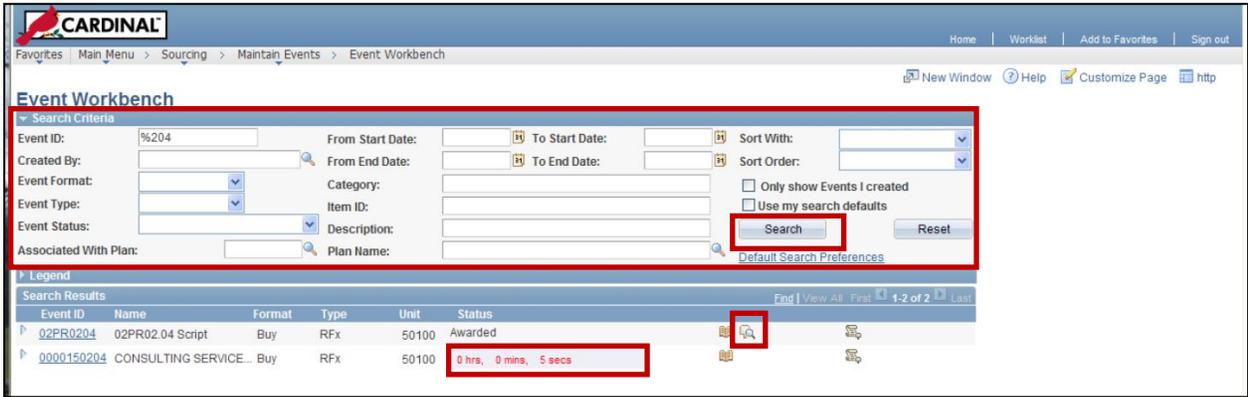
### Bid Analysis Collaboration

#### Invite Collaborators for Bid Analysis (SS Buyer)

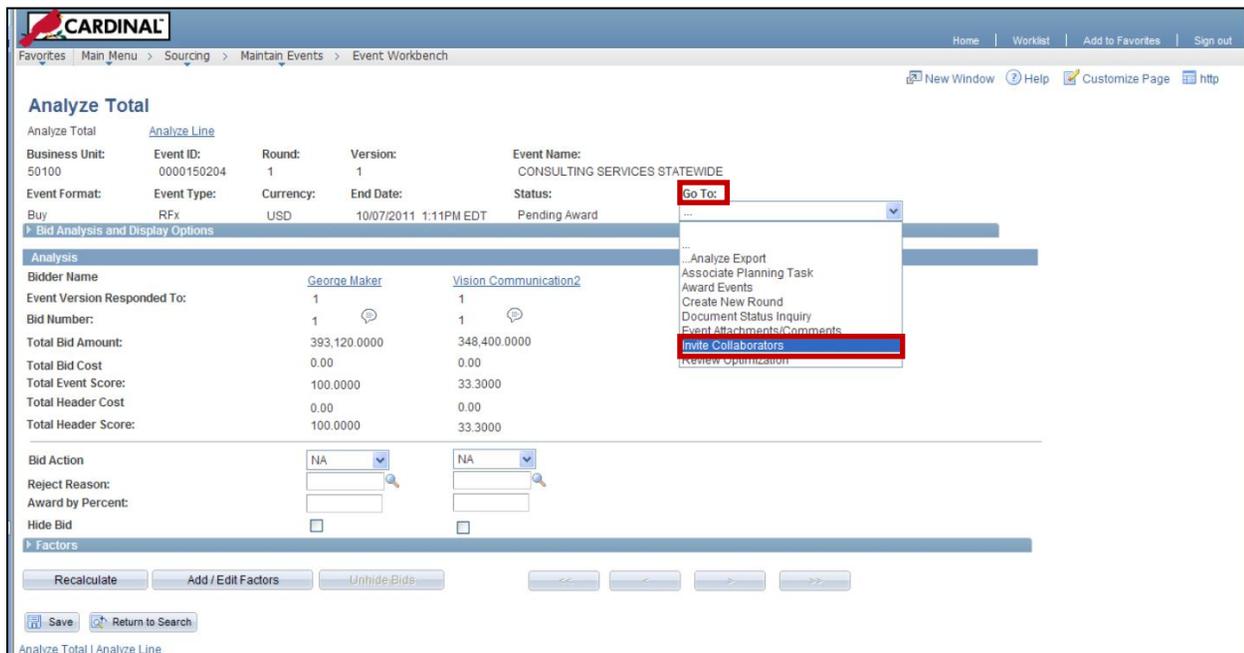
Once the event is closed and all responses are received, the event is opened with another version to add bidders and allow time for Bid Processors to add the bid responses. The Bid Processor enters the responses into Cardinal and notifies the SS Buyer, i.e., event creator. The SS Buyer analyzes the responses and may invite Collaborators for approvals or comments, prior to making the award using the Invite Collaborators page. The SS Buyer may invite Collaborators such as, Customers (users) for comments, a manager for approval, or RFP Evaluation Committee members for scoring.

- 1 As the SS Buyer you can invite Collaborators to take part in the bid analysis. Navigate using the following path:

**Main Menu > Sourcing > Maintain Events > Event Workbench**



- 2 Search for the event using the any combination of search criteria. Click **Search**.
- 3 Find the event in the search results and click on the **Analyze Bids** icon to analyze the event. The **Analyze Bids** option will not be available if the event **Status** is **Open**. The **Analyze Total** page will display.
- 4 Note: In the screen shot above we see the collaboration countdown time displayed for the second event.



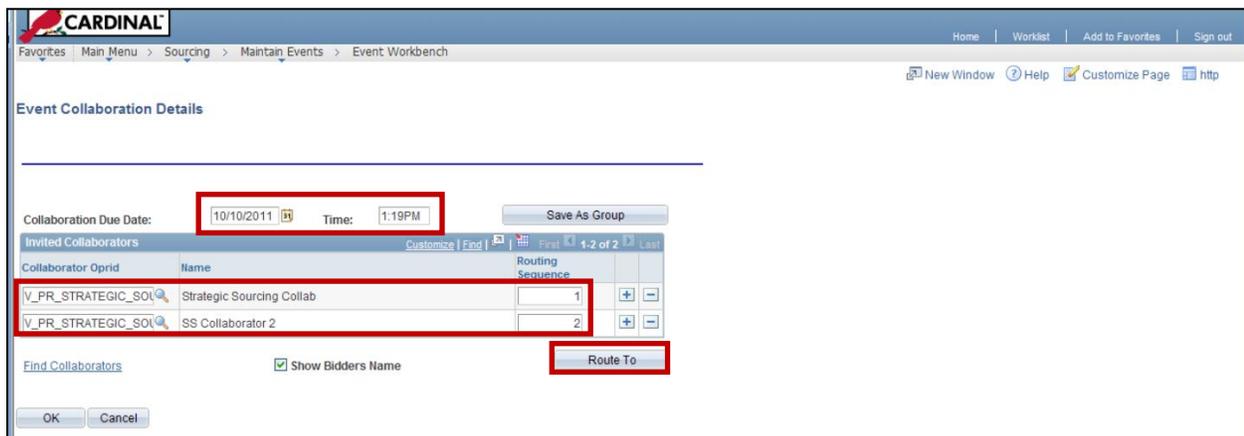
The screenshot shows the 'Analyze Total' page in the CARDINAL system. The 'Go To' dropdown menu is open, and 'Invite Collaborators' is highlighted in red. The page displays various bid analysis metrics and options.

Business Unit:	Event ID:	Round:	Version:	Event Name:
50100	0000150204	1	1	CONSULTING SERVICES STATEWIDE

Event Format:	Event Type:	Currency:	End Date:	Status:
Buy	RFx	USD	10/07/2011 1:11PM EDT	Pending Award

Bidder Name	George Maker	Vision Communication2
Event Version Responded To:	1	1
Bid Number:	1	1
Total Bid Amount:	393,120,000	348,400,000
Total Bid Cost:	0.00	0.00
Total Event Score:	100.0000	33.3000
Total Header Cost:	0.00	0.00
Total Header Score:	100.0000	33.3000

- In the **Go To** drop-down menu, click **Invite Collaborators**. The **Event Collaboration Details** page will display.
- Note: Collaborators may have previously reviewed and scored bid responses outside of Cardinal. Each Collaborator enters their scores into Cardinal for calculation.

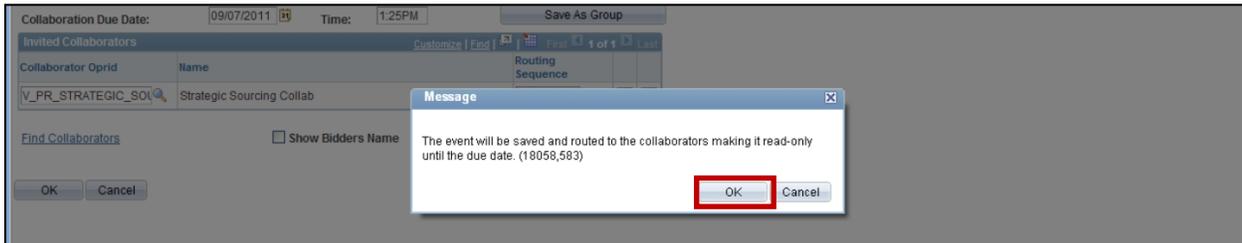


The screenshot shows the 'Event Collaboration Details' page in the CARDINAL system. The 'Collaboration Due Date' and 'Time' fields are highlighted in red. The 'Invited Collaborators' table is also visible.

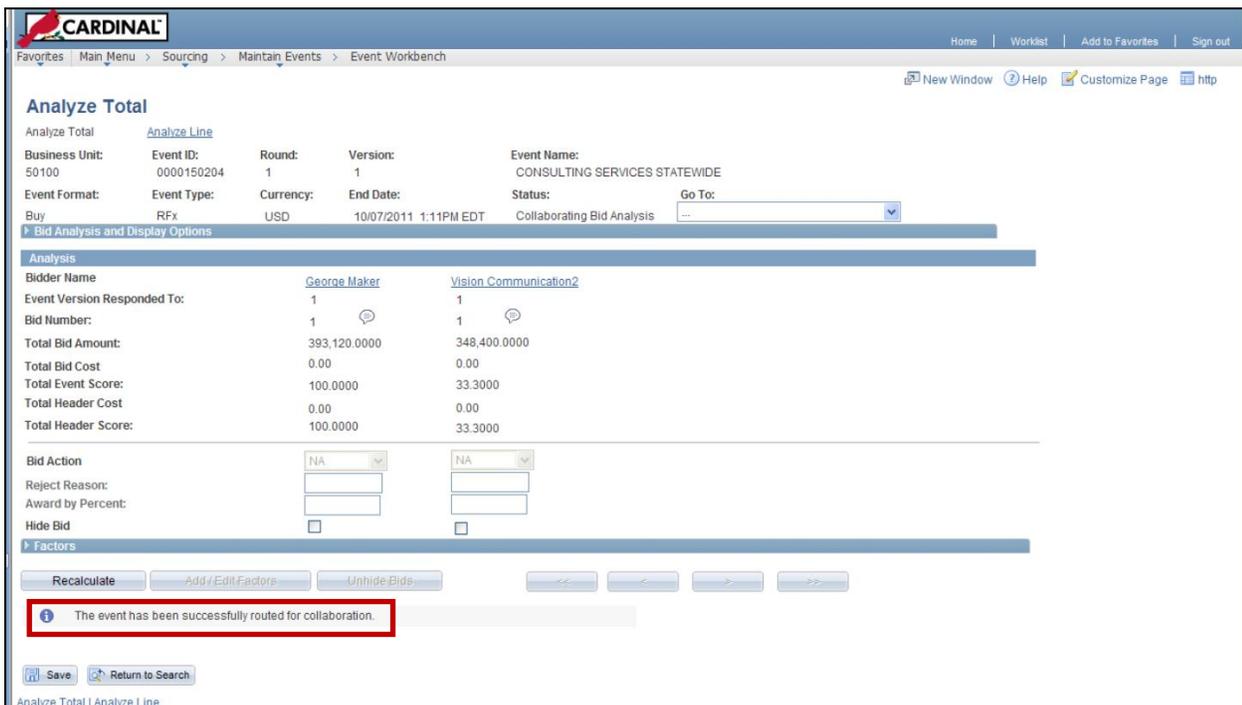
Collaborator Oprid	Name	Routing Sequence
V_PR_STRATEGIC_SOCI	Strategic Sourcing Collab	1
V_PR_STRATEGIC_SOCI	SS Collaborator 2	2

- In the **Collaboration Due Date** field, enter a deadline date and time for all collaboration to end.
- Clear all existing names in the **Collaborator Oprid** field.
- In the **Collaborator Oprid** field, enter the name of the user you wish to invite to collaborate on the event. You can use the magnifying glass **Look up Collaborator Oprid** icon, if needed, to find a user. If you have previously set up a **Collaborator Group** you may access the group by clicking on the **Find Collaborators** hyperlink.
- Click the **Add a new row at row x** icon (+) at the end of the row to add another Collaborator. Use the **Delete row X** icon (-) to remove a Collaborator.

- 11 The **Routing Sequence** number is automatically populated as you select the Collaborators. You may modify the sequence to ensure the event is reviewed by the Collaborators in the order you wish.
- 12 Once all the collaborators have been entered click **Route To** button. (This step is different from when you invited collaborators previously.) A routing confirmation message appears.



- 13 The routing message notifies you that the event will be read-only until the collaboration due date. Click the **OK** button. The **Analyze Total** page displays.



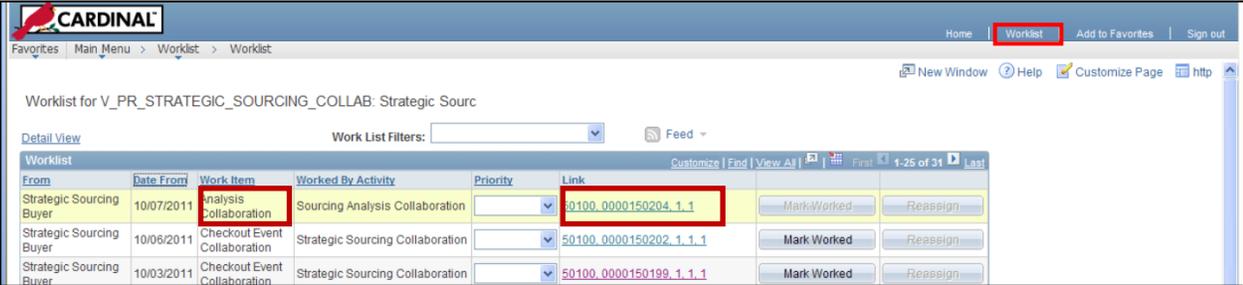
- 14 The event is read only for non-collaborators until the due date, and has been routed for collaboration. An email notification is sent to each Collaborator and an item is added to each Collaborator's worklist.
- 15 Collaborators may score the event at any time, prior to the due date.

### Collaborate on Bid Analysis

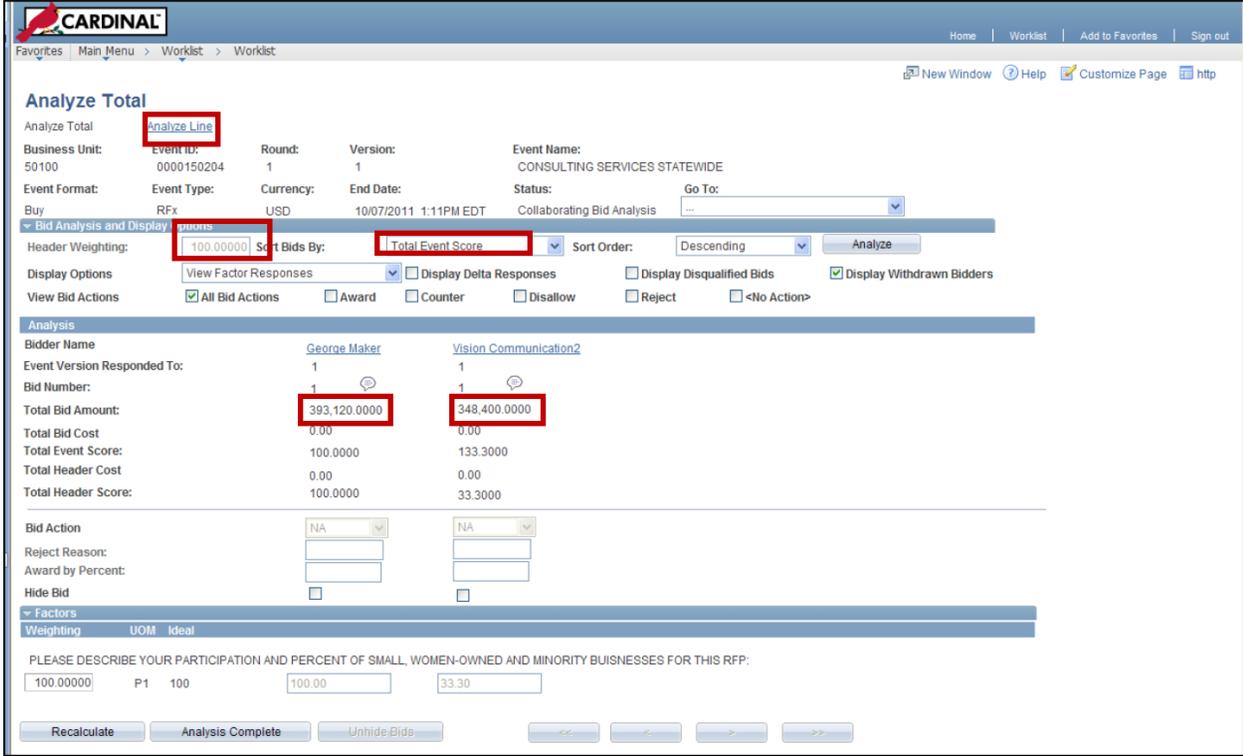
An email notification is sent to each Collaborator and an item is added to each Collaborator's worklist indicating that collaboration is needed. As an **Event Collaborator**, to access the event you have multiple options:

- Click on the **Collaborate on this event** hyperlink in the email notification you received, or
- Click on the event hyperlink, i.e. **Link**, from your **Worklist**

1 To access the event using your **Worklist**, from any Cardinal page, click on the **Worklist** hyperlink in the top right hand corner of the page. Your **Worklist** displays.



2 Under the **Work Item** column, the event will be listed as **Checkout Event Collaboration**. Click the **Link** column hyperlink on the row with the event that has the collaboration you wish to review. The **Analyze Total** page displays.



3 Review the **Total Bid Amount** and bid factors. If applicable, text bid factors would be scored here.

4 Click the **Analyze Line** hyperlink in the top left part of the page. The **Analyze Line** page displays.

**Analyze Line**

Business Unit: 50100 | Event ID: 0000150204 | Round: 1 | Version: 1 | Event Name: CONSULTING SERVICES STATEWIDE

Event Format: Buy | Event Type: RFX | Currency: USD | End Date: 10/07/2011 1:11PM EDT | Status: Collaborating Bid Analysis

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	0041404021	Consulting	0041404	HUR	0.01000	2,080.0000	0.0000	0.00000	Open	Analyze

- To analyze responses by line, click the **Analyze** bids hyperlink on each line in the **Line Items** section. A different **Analyze Line** page displays.

**Analyze Line**

Business Unit: 50100 | Event ID: 0000150204 | Round: 1 | Version: 1 | Event Name: CONSULTING SERVICES STATEWIDE

Event Format: Buy | Event Type: RFX | Currency: USD | End Date: 10/07/2011 1:11PM EDT | Status: Collaborating Bid Analysis

Line: 1 | Requested Quantity: 2080.0000 | UOM: HUR | Start Price: [ ]

Item ID: 0041404021 | Item Description: Consulting | Weighting: [ ]

**Bid Analysis and Display Options**

**Analysis**

Field	Vision Communication2	George Maker
Bidder Name	Vision Communication2	George Maker
Event Version:	1	1
Bid Number:	1	1
Bid Quantity:	2,080.0000	2,080.0000
Minimum Bid Quantity	0.0000	0.0000
Total Bid Amount:	348,400.0000	393,120.0000
Total Bid Cost:	0.00	0.00
Total Line Score:	100.0000	0.0000

Bid Action: [NA] [NA]

Reject Reason Code: [ ] [ ]

Award by Percent: [ ] [ ]

Award Quantity: [ ] [ ]

Hide Bid:

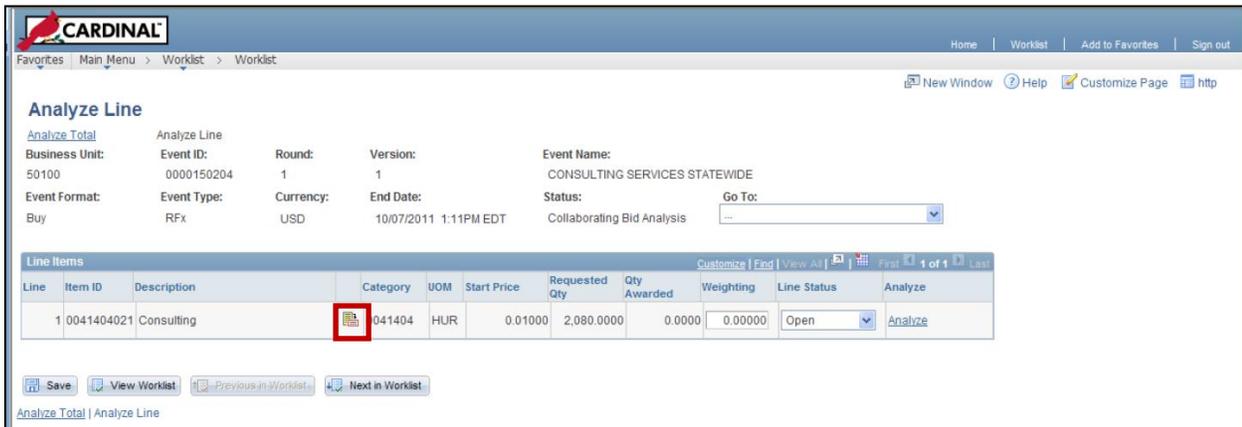
**Factors**

Weighting	UOM	Ideal
What is your bid price?		
100.00000	0	187.50
		188.00

Recalculate | Unhide Bids

OK | Cancel | Apply

- Review the line bid price information.
- Click the **OK** button. The original **Analyze Line** page displays.



**Analyze Line**

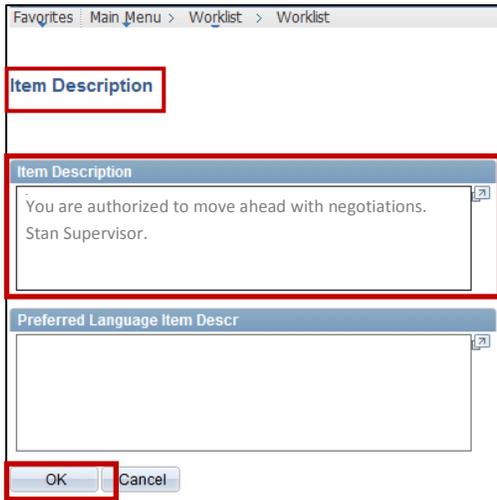
Business Unit: 50100    Event ID: 0000150204    Round: 1    Version: 1    Event Name: CONSULTING SERVICES STATEWIDE

Event Format: Buy    Event Type: RFX    Currency: USD    End Date: 10/07/2011 1:11PM EDT    Status: Collaborating Bid Analysis    Go To: [Dropdown]

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	0041404021	Consulting	041404	HUR	0.01000	2,080.0000	0.0000	0.00000	Open	Analyze

Buttons: Save, View Worklist, Previous in Worklist, Next in Worklist

- 8 To enter comments on a bid response item, click on the **Item Description** icon. Comments entered on the **Item Description** are carried over to events that are copied from this event. Therefore, it is recommended you do not use the copy functionality on events with comments added using **Item Description**.



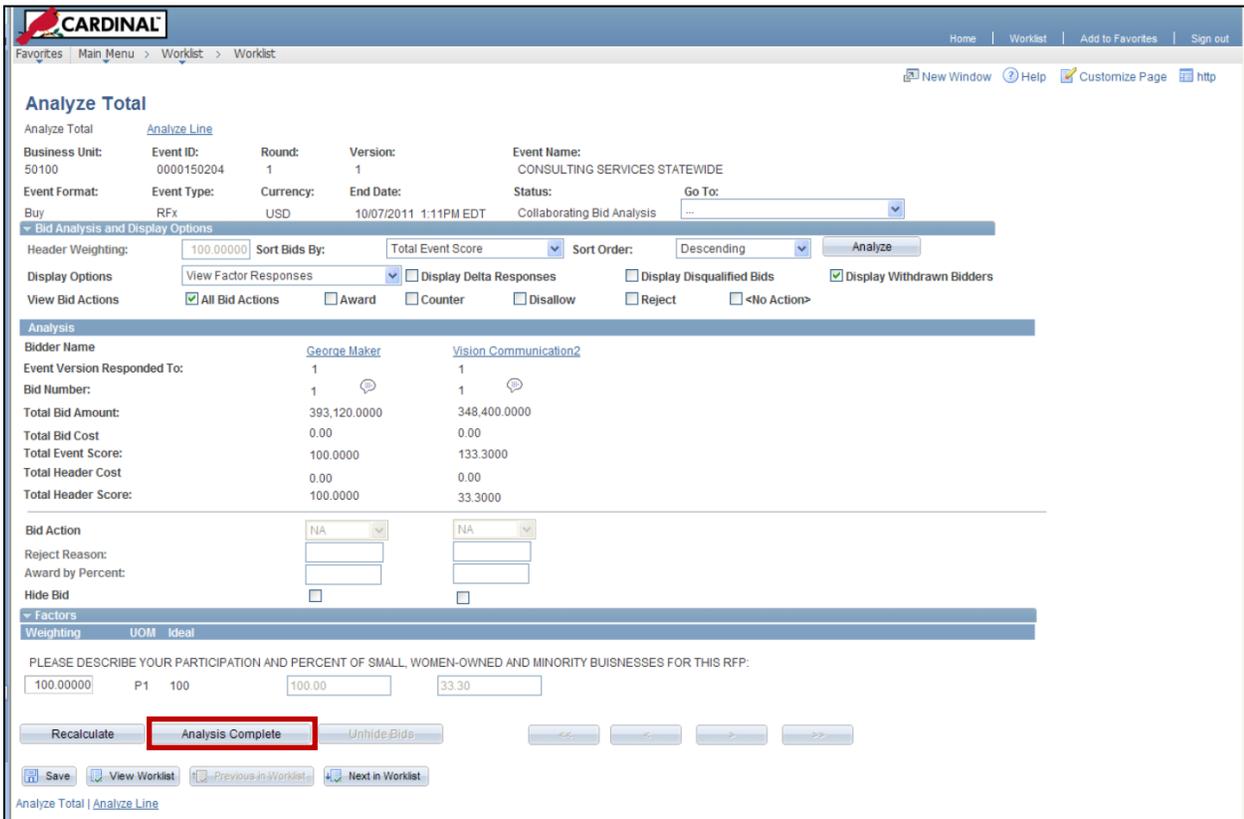
Item Description

You are authorized to move ahead with negotiations.  
Stan Supervisor.

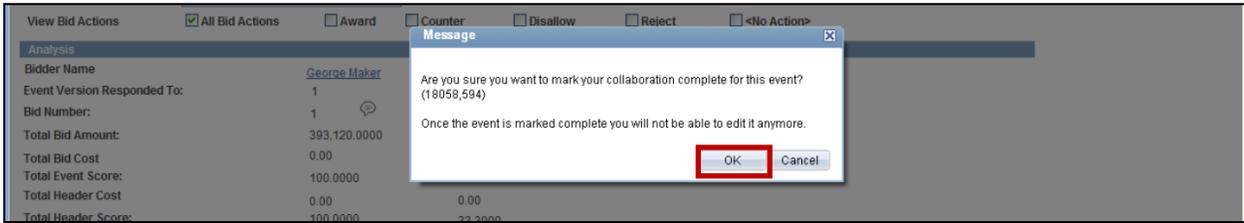
Preferred Language Item Descr

OK Cancel

- 9 Enter a comment in the **Item Description** box.
- 10 Click the **OK** button. The **Analyze Total** page is displayed.



11 After you have reviewed all of the event responses and entered comments, click the **Analysis Complete** button. A confirmation message displays.



12 Click the **OK** button to confirm that you do not wish to make further edits and to complete collaboration.

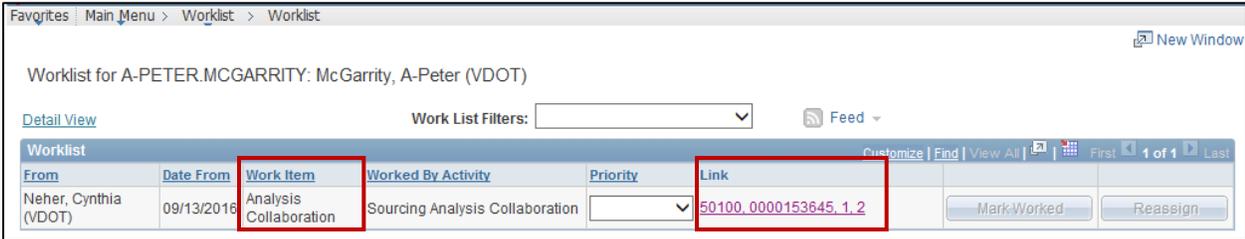
13 An email notification and worklist item are added to the SS Buyer **Worklist** indicating that collaboration has been completed by all Collaborators.

### Review Bid Analysis Collaboration (SS Buyer)

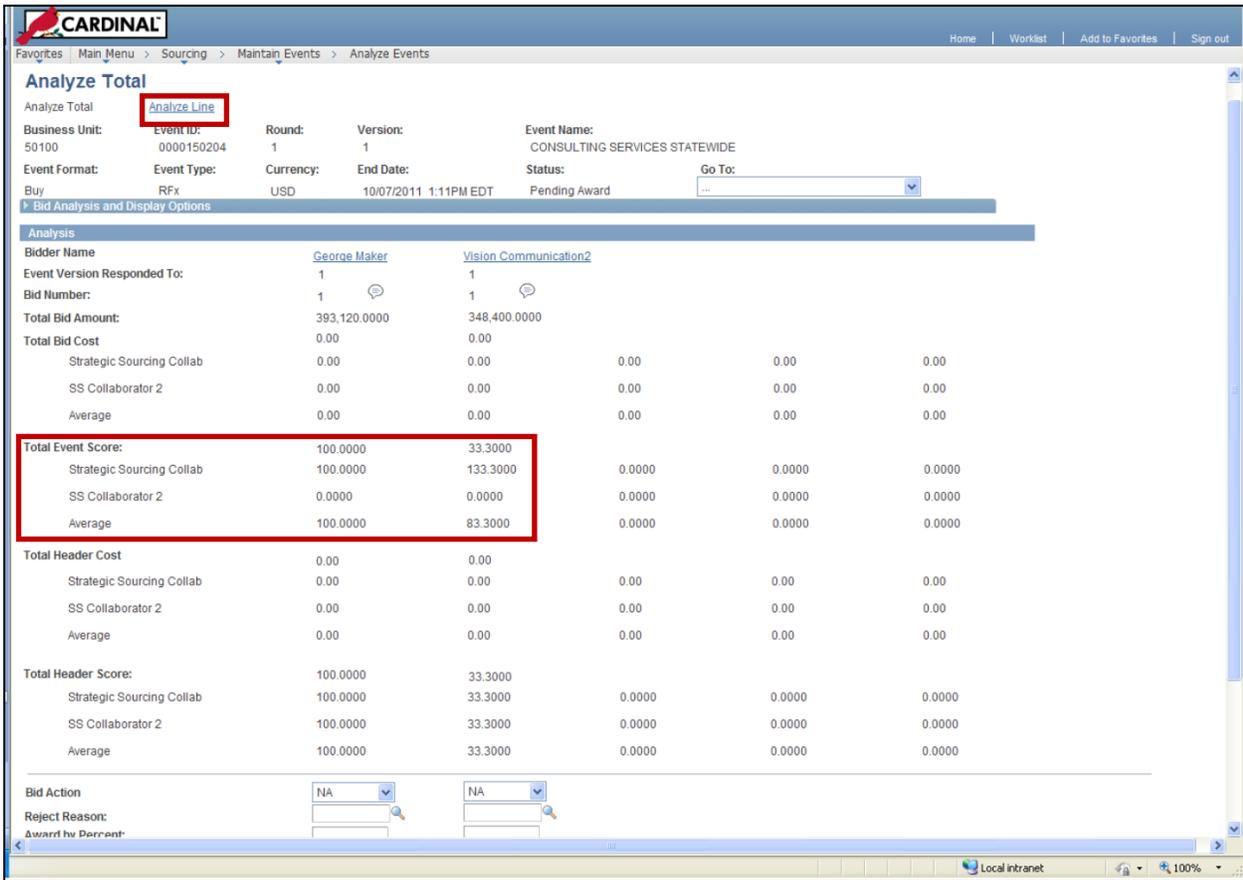
To review collaborator input on the bid responses, the SS Buyer has multiple options:

- Click on the **Event Analysis Collaboration** hyperlink in the email notification you received, or
- Click on the event hyperlink, i.e. **Link**, from your **Worklist**

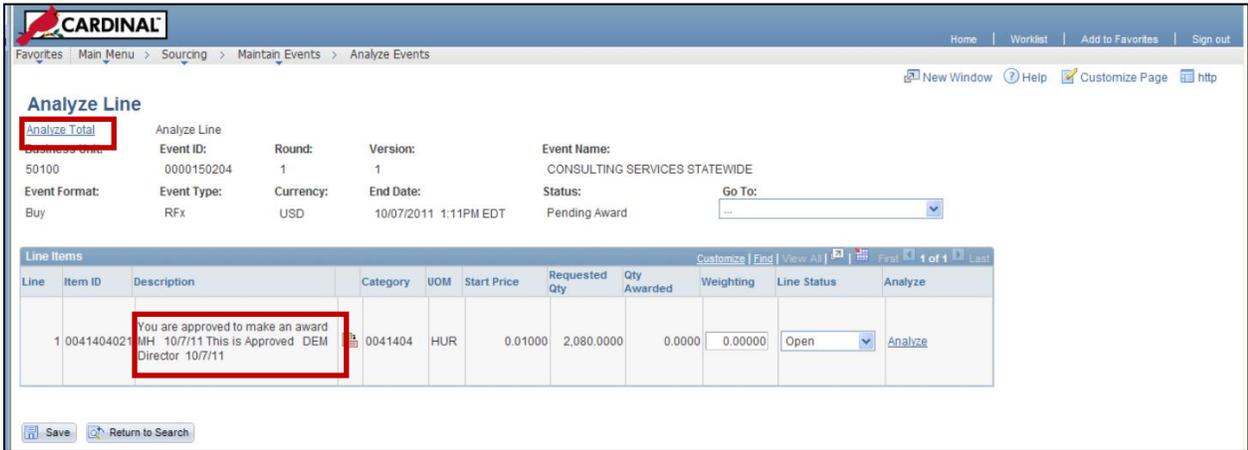
1 Using your **Worklist**, from any Cardinal page, click on the **Worklist** hyperlink in the top right hand corner of the page. Your **Worklist** displays.



- Under the **Work Item** column, the event will be listed as **Analysis Collaboration**. Click the **Link** column hyperlink on the row with the event that has the collaboration you wish to review. The **Analyze Total** page displays for the selected event.



- Review Collaborator scores for the bid responses.
- Click the **Analyze Line** hyperlink. The **Analyze Line** page displays.



**Analyze Line**

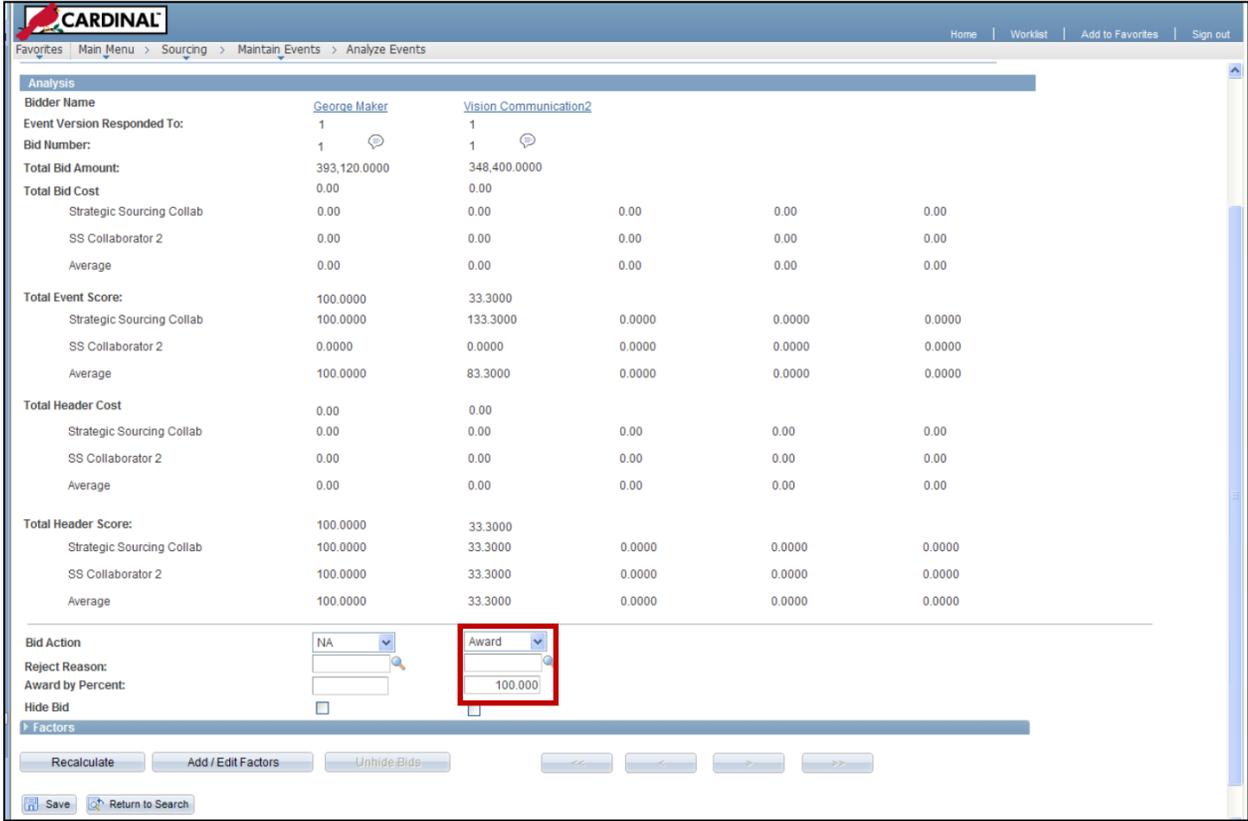
[Analyze Total](#)

Analyze Line  
 Event ID: 50100 Round: 0000150204 1 Version: 1 Event Name: CONSULTING SERVICES STATEWIDE  
 Event Format: Buy Event Type: RFX Currency: USD End Date: 10/07/2011 1:11PM EDT Status: Pending Award Go To: [Dropdown]

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	004140402	You are approved to make an award on 10/7/11 This is Approved DEM Director 10/7/11	0041404	HUR	0.01000	2,080.0000	0.0000	0.00000	Open	Analyze

Save Return to Search

- Review the Collaborator comments which appear in the **Description** field of each line.
- After reviewing the comments, click the **Analyze Total** hyperlink. The **Analyze Total** page displays.



**Analysis**

Bidder Name: George Maker Vision Communication2  
 Event Version Responded To: 1 1  
 Bid Number: 1 1  
 Total Bid Amount: 393,120.0000 348,400.0000  
 Total Bid Cost: 0.00 0.00

	George Maker	Vision Communication2			
Strategic Sourcing Collab	0.00	0.00	0.00	0.00	0.00
SS Collaborator 2	0.00	0.00	0.00	0.00	0.00
Average	0.00	0.00	0.00	0.00	0.00
<b>Total Event Score:</b>	100.0000	33.3000			
Strategic Sourcing Collab	100.0000	133.3000	0.0000	0.0000	0.0000
SS Collaborator 2	0.0000	0.0000	0.0000	0.0000	0.0000
Average	100.0000	83.3000	0.0000	0.0000	0.0000
<b>Total Header Cost</b>	0.00	0.00			
Strategic Sourcing Collab	0.00	0.00	0.00	0.00	0.00
SS Collaborator 2	0.00	0.00	0.00	0.00	0.00
Average	0.00	0.00	0.00	0.00	0.00
<b>Total Header Score:</b>	100.0000	33.3000			
Strategic Sourcing Collab	100.0000	33.3000	0.0000	0.0000	0.0000
SS Collaborator 2	100.0000	33.3000	0.0000	0.0000	0.0000
Average	100.0000	33.3000	0.0000	0.0000	0.0000

Bid Action: NA Award  
 Reject Reason: [Text Box]  
 Award by Percent: 100.000  
 Hide Bid: [Checkbox]

Factors

Recalculate Add / Edit Factors Unhide Bids [Navigation Buttons]

Save Return to Search

- Follow normal strategic sourcing processes to make the award. For instructions on the strategic sourcing process and awarding events, refer to the course titled **501 PR345 Strategic Sourcing** and the **501 PR345 Strategic Sourcing Event Awards** job aid.