

### About Strategic Sourcing Collaboration

Cardinal allows a Strategic Sourcing (SS) Buyer to select individuals (known as Collaborators) to participate in an Event. Collaborators may include the customer (user), the supervisor (Procurement Manager), subject matter experts, Evaluation Committee members and others. Collaborators can make comments, score, establish weights and share data with the SS Buyer and the other Collaborators. Suggested changes by a Collaborator can be accepted or rejected by the SS Buyer. All collaboration is maintained within Cardinal as a record of participation.

**Select Collaborators:**

**Pages 1 - 4**

**Collaborate on an Event:**

**Pages 5 - 10**

**Review Collaboration:**

**Pages 11 - 14**

**Invite Collaborators:**

**Pages 14 - 17**

**Collaborate on Event Response:**

**Pages 17 - 21**

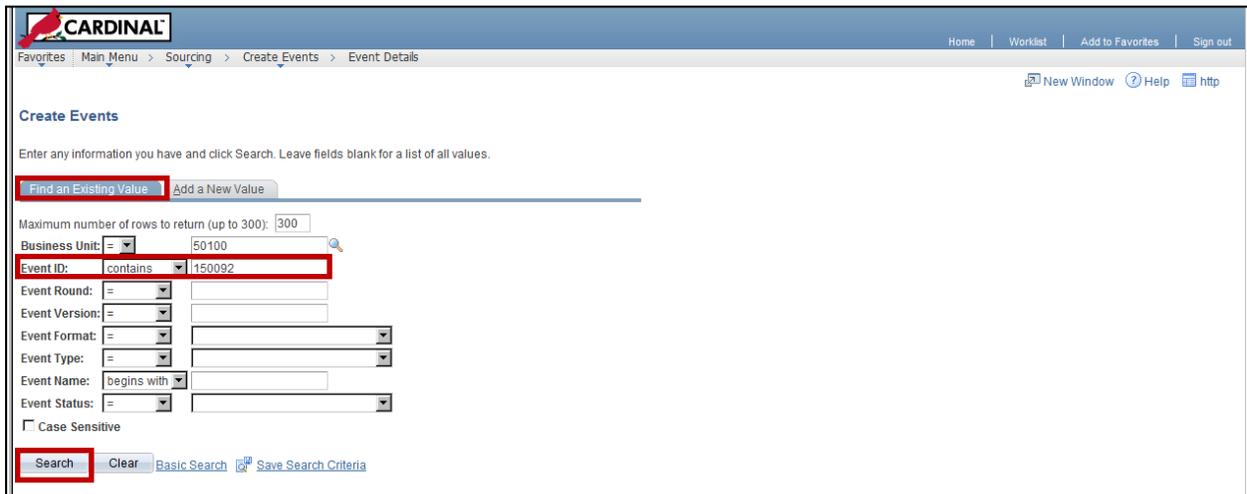
**Review/Analyze Collaboration:**

**Pages 21 - 22**

### Select Collaborators:

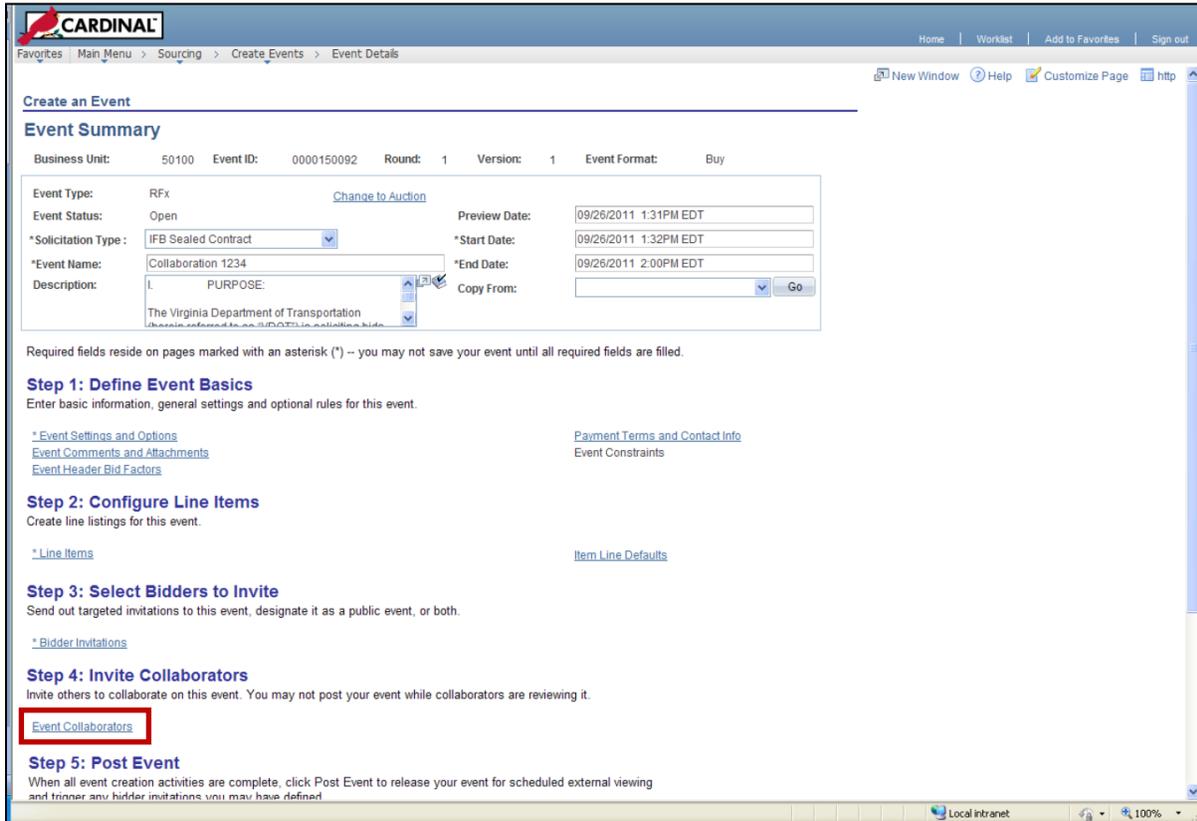
The SS Buyer selects Collaborators and adds them to an event that is being created, or at a later date to analyze event responses. If needed, navigate to and open the event for editing. In this job aid, we navigate to an existing event.

- 1 Navigate to **Main Menu > Sourcing > Create Events > Event Details**.



The screenshot shows the 'Create Events' page in the Cardinal application. The breadcrumb navigation is 'Main Menu > Sourcing > Create Events > Event Details'. The page title is 'Create Events'. Below the title, there is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Below the tabs, there is a 'Maximum number of rows to return (up to 300):' field set to '300'. The search criteria are: 'Business Unit: 50100', 'Event ID: contains 150092', 'Event Round: =', 'Event Version: =', 'Event Format: =', 'Event Type: =', 'Event Name: begins with', and 'Event Status: ='. There is a 'Case Sensitive' checkbox which is unchecked. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. The 'Search' button is highlighted with a red box.

- 2 Click on the **Find an Existing Value** tab to look up an existing event. The **Business Unit** field will default, do not change this value.
- 3 Specify the desired search criteria for the event and click the **Search** button.



**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.

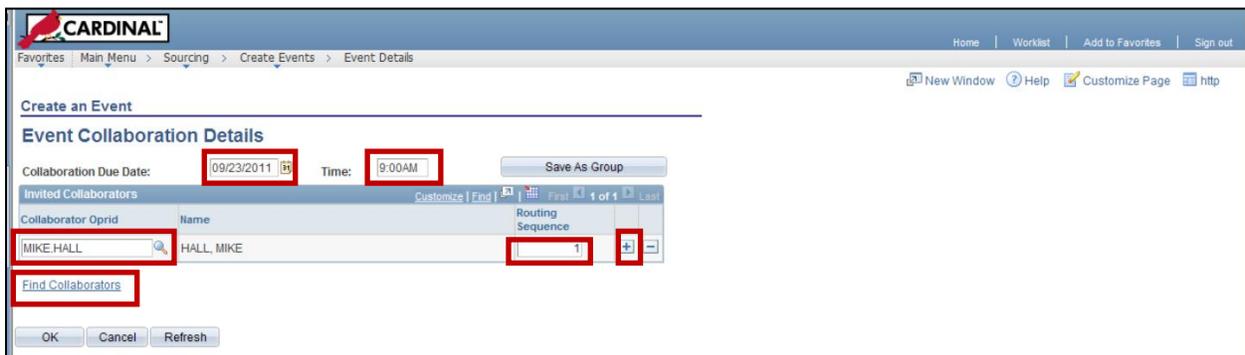
[\\* Bidder Invitations](#)

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

[Event Collaborators](#)

**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.

- 4 Click the **Event Collaborators** hyperlink.



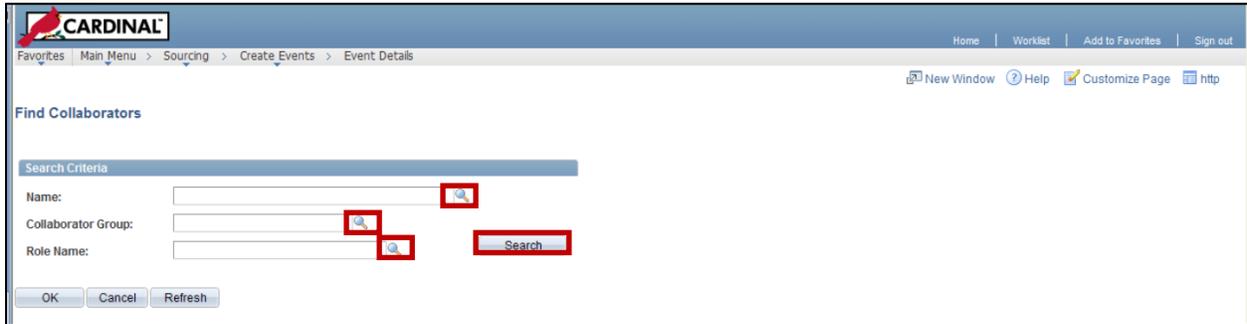
**Event Collaboration Details**

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

Collaborator Oprid	Name	Routing Sequence
MIKE HALL	HALL, MIKE	1

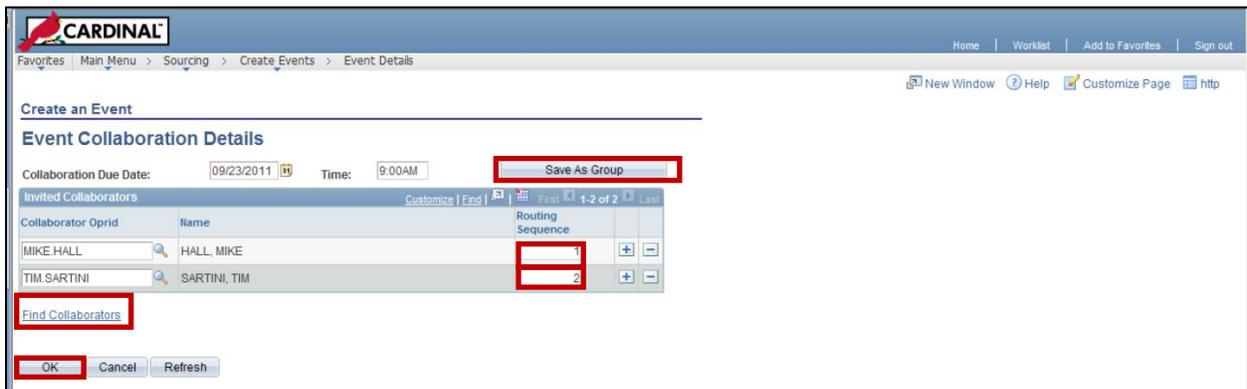
[Find Collaborators](#)

- 5 In the **Collaboration Due Date** field, enter a deadline date and time for all collaboration to end.  
**NOTE:** The **Collaboration Due Date** must be **prior** to the event **Preview Date**.
- 6 In the **Collaborator Oprid** field, enter the Collaborator name (use the **Look Up** icon, if needed). The **Routing Sequence** number is automatically populated.
- 7 Click the **add a new row** button at the end of the row to add another Collaborator and enter the **Collaborator Oprid**. **Note:** If necessary, you can search for Collaborators or Groups by clicking the **Find Collaborators** hyperlink.



The screenshot shows the 'Find Collaborators' search form. It includes a search criteria section with three input fields: 'Name', 'Collaborator Group', and 'Role Name'. Each field has a magnifying glass icon to its right. A 'Search' button is located to the right of the 'Role Name' field. Below the search fields are 'OK', 'Cancel', and 'Refresh' buttons.

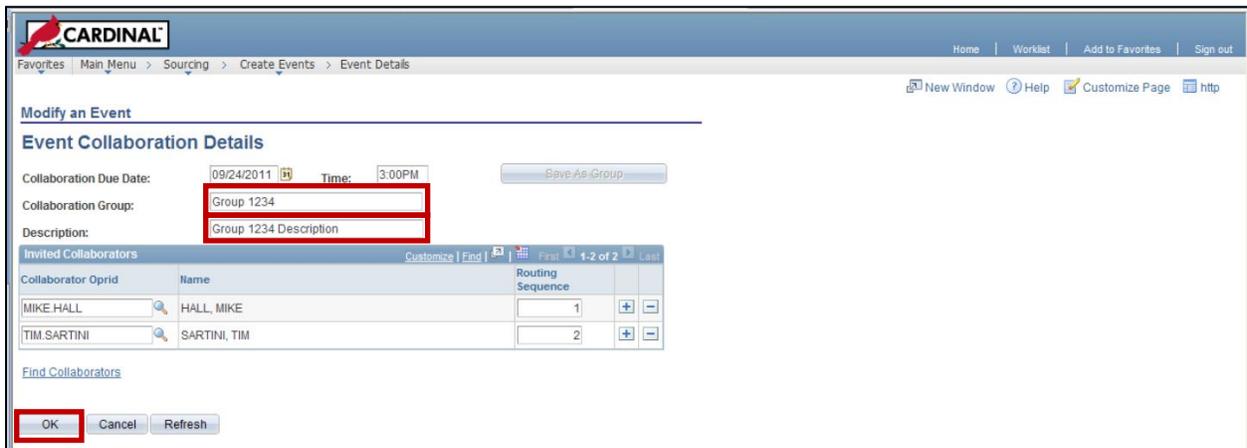
- 8 You may search by **Name**, **Collaborator Group** or **Role Name**
- 9 Enter search criteria and click the **Search** button



The screenshot shows the 'Event Collaboration Details' form. It includes a 'Save As Group' button at the top right. Below it is a table of 'Invited Collaborators' with columns for 'Collaborator Opid', 'Name', and 'Routing Sequence'. The table contains two rows: 'MIKE HALL' with routing sequence 1 and 'TIM SARTINI' with routing sequence 2. A 'Find Collaborators' button is located below the table. At the bottom are 'OK', 'Cancel', and 'Refresh' buttons.

Collaborator Opid	Name	Routing Sequence
MIKE HALL	HALL, MIKE	1
TIM SARTINI	SARTINI, TIM	2

- 10 Select collaborators and click the **OK** button.
- 11 You may change the order of the **Routing Sequence** if you wish. The sequence number identifies the order in which the collaborators offer feedback.
- 12 If you wish to save the selected Collaborators as a group, click the **Save As Group** button.



**Modify an Event**

**Event Collaboration Details**

Collaboration Due Date: 09/24/2011 Time: 3:00PM [Save As Group](#)

Collaboration Group:

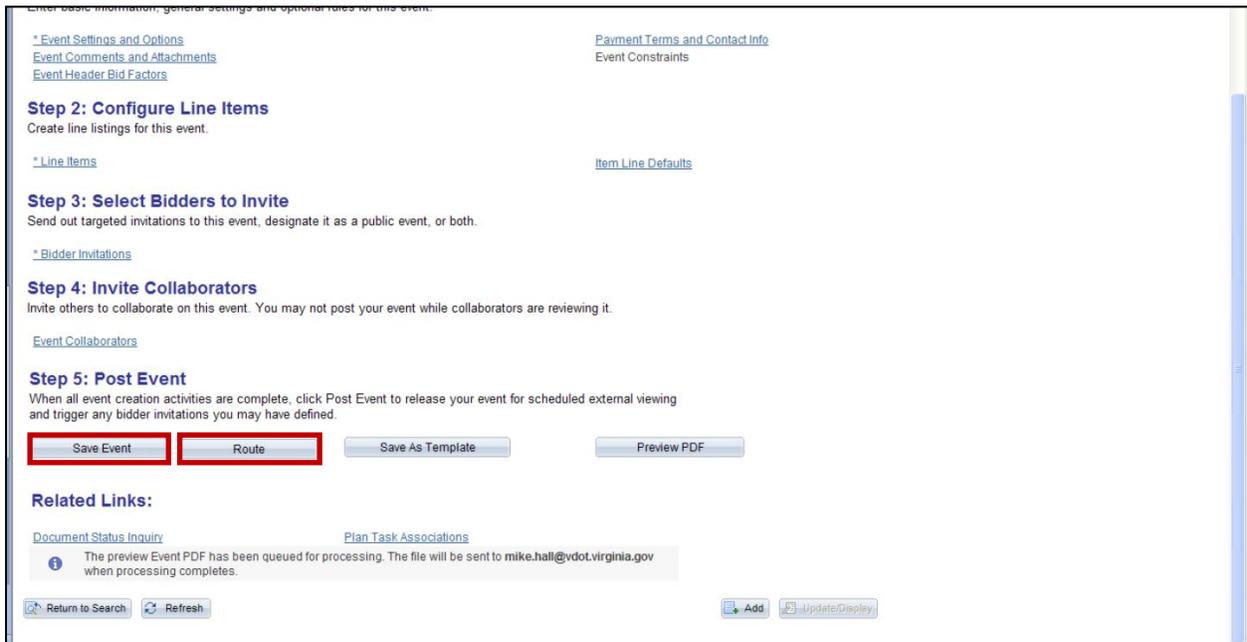
Description:

**Invited Collaborators**

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

[Find Collaborators](#)

- 13 For the group you are saving, enter a name and description into the **Collaboration Group** and **Description** fields
- 14 Click the **OK** button to return to **Event Summary** page.



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](#)

**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](#)

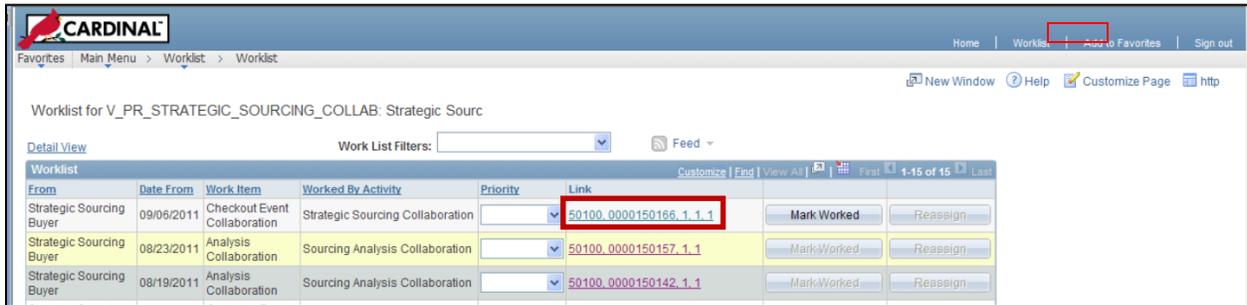
 The preview Event PDF has been queued for processing. The file will be sent to mike.hall@vdot.virginia.gov when processing completes.

[Return to Search](#)

- 15 Click the **Save Event** button and click the **Route** button.
- 16 Email notification is sent to each Collaborator and an item is added to each Collaborator's worklist.

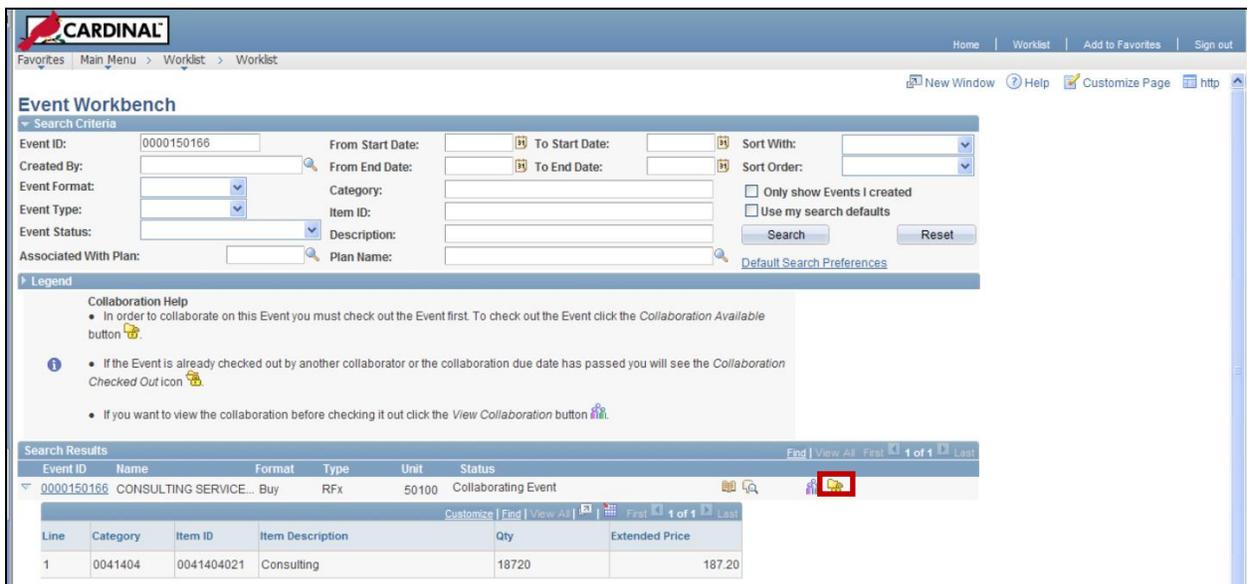
### Collaborate on an Event:

- 1 To collaborate on an event, click the **Collaborate on this event** hyperlink from the e-mail notification, or view the event from your worklist.
- 2 Navigate to **Main Menu > Worklist > Worklist**.
- 3 The Worklist appears.



From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
Strategic Sourcing Buyer	09/06/2011	Checkout Event Collaboration	Strategic Sourcing Collaboration		50100_0000150166_1_1_1		
Strategic Sourcing Buyer	08/23/2011	Analysis Collaboration	Sourcing Analysis Collaboration		50100_0000150157_1_1		
Strategic Sourcing Buyer	08/19/2011	Analysis Collaboration	Sourcing Analysis Collaboration		50100_0000150142_1_1		

- 4 Click the **Event** hyperlink for the event you wish to collaborate on. The event will be listed as **Checkout Event Collaboration** under the **Work Item** column.
- 5 The **Event Workbench** page appears.



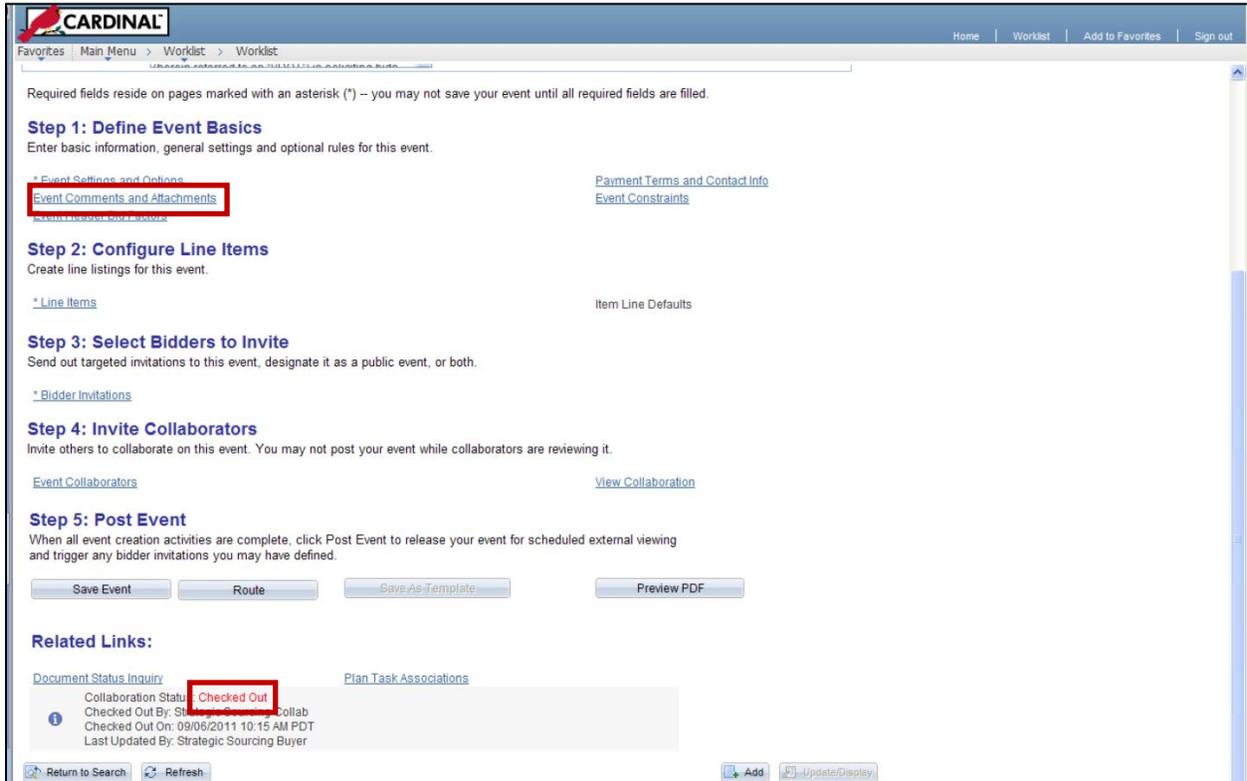
**Legend**

- 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	

- 6 Check out the event for collaboration, by clicking the **Check Out** icon.



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](#)

**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.

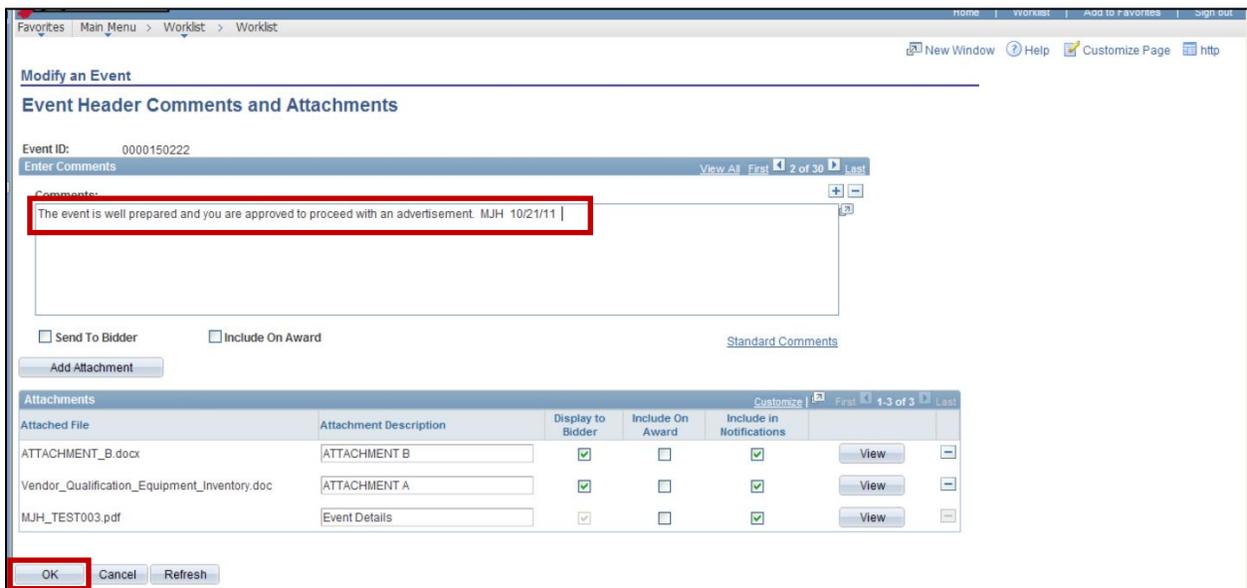
**Related Links:**

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

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

7 **Collaboration Status** appears as **Checked Out** and includes details on when and by whom.

8 To make edits or add comments, click the **Event Comments and Attachments** hyperlink.



**Modify an Event**

**Event Header Comments and Attachments**

Event ID: 0000150222

Enter Comments [View All](#) [First](#) [2 of 30](#) [Last](#)

Comments:

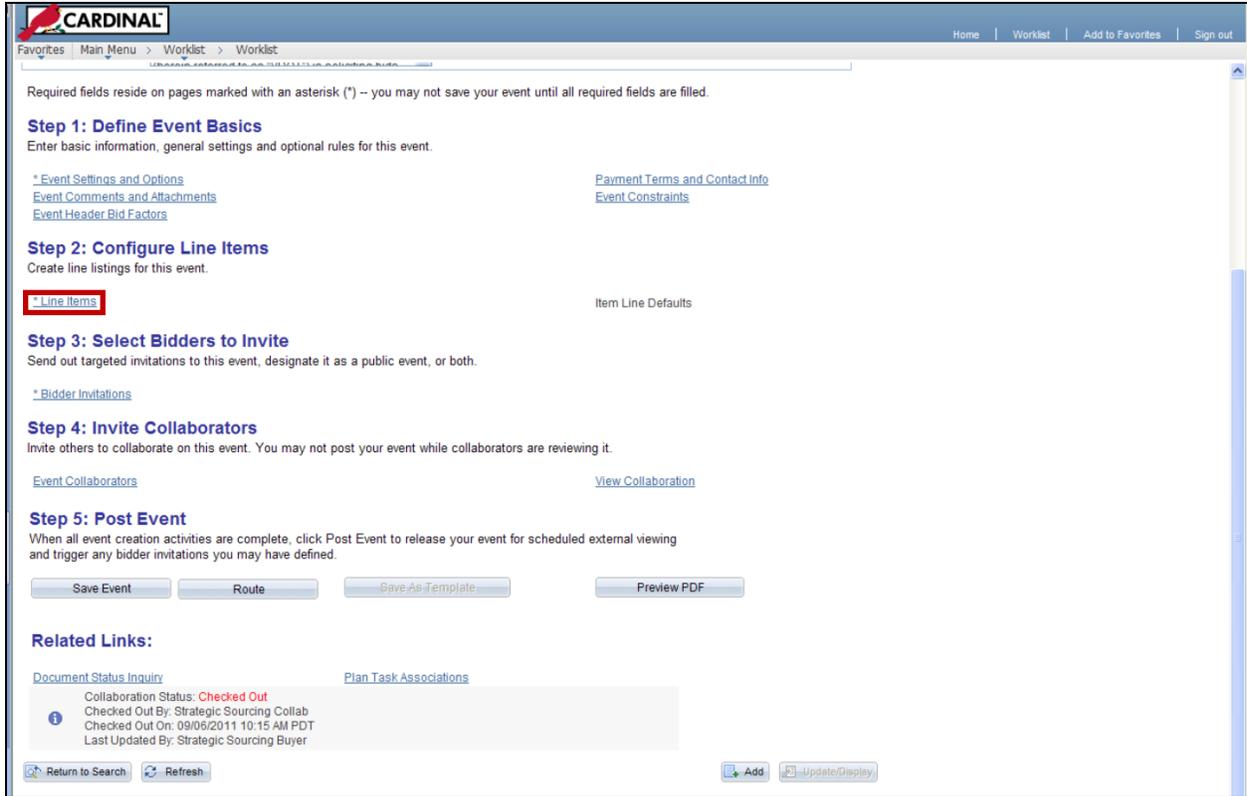
Send To Bidder  Include On Award [Standard Comments](#)

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

9 Enter comments in the **Comments** field.

10 Click the **OK** button.

11 To modify the event lines, click the **Line Items** hyperlink.



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](#)

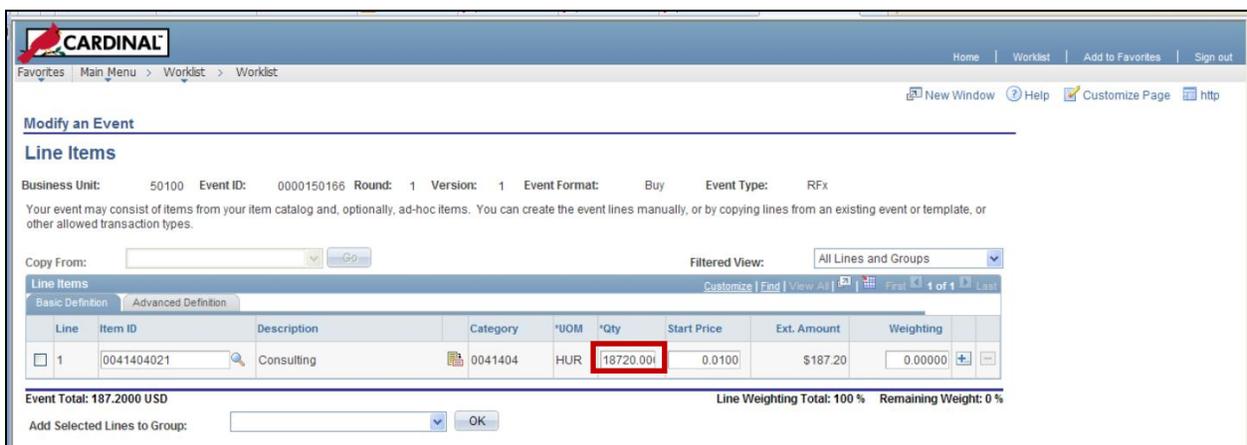
**Related Links:**

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

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

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

12 To modify the event lines, click the **Line Items** hyperlink.



**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:  [C2](#) Filtered View: [All Lines and Groups](#)

**Line Items** [Customize](#) [Find](#) [View All](#) [First](#) [1 of 1](#) [Last](#)

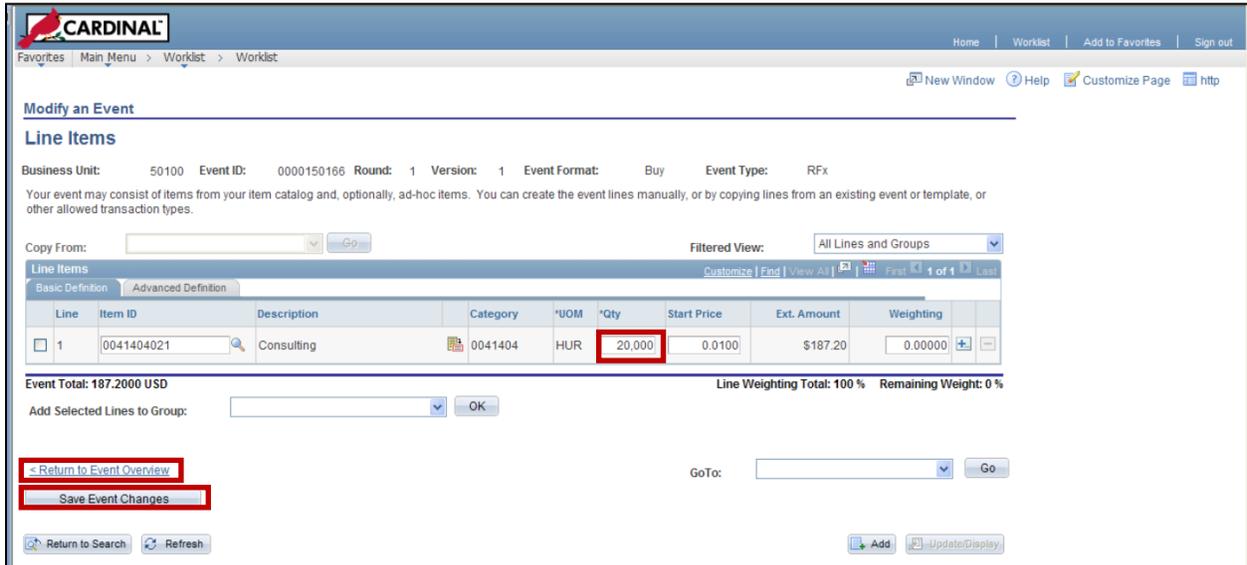
Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1	0041404021	Consulting	0041404	HUR	18720.000	0.0100	\$187.20	0.00000

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

Add Selected Lines to Group:  [OK](#)

13 The initial line quantity appears in the **Qty** field for each line.

14 Change the value in this field, if applicable.



**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 %

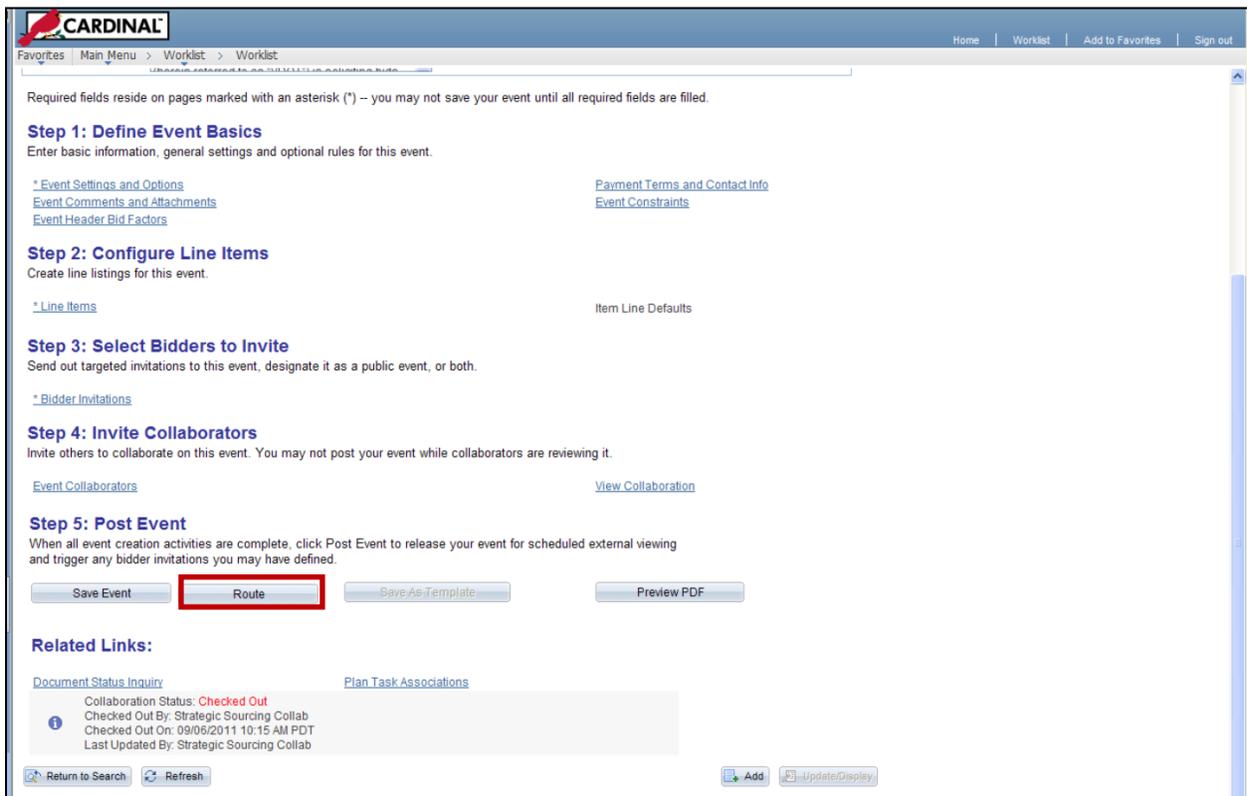
Add Selected Lines to Group:

[Return to Event Overview](#)

GoTo:

15 After you have made the all edits you wish enter, click the **Save Event Changes** button.

16 Click the **Return to Event Overview** hyperlink.



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](#)

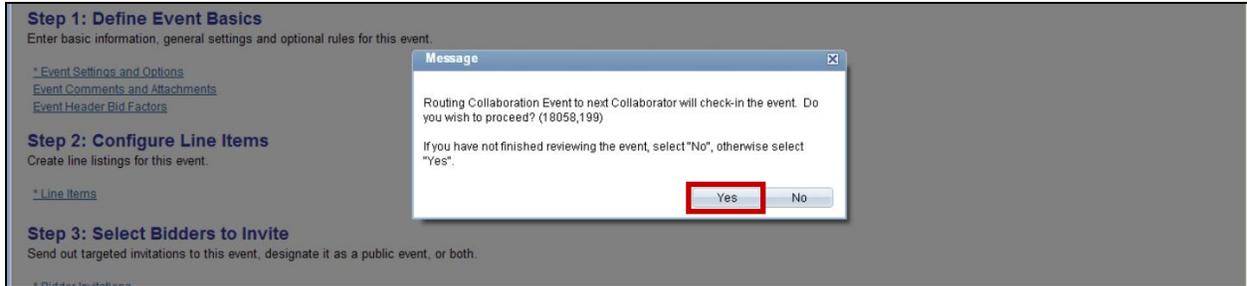
**Step 5: Post Event**  
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

**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

17 Upon completion of all collaboration edits and/or comments, click the **Route** button.



**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.

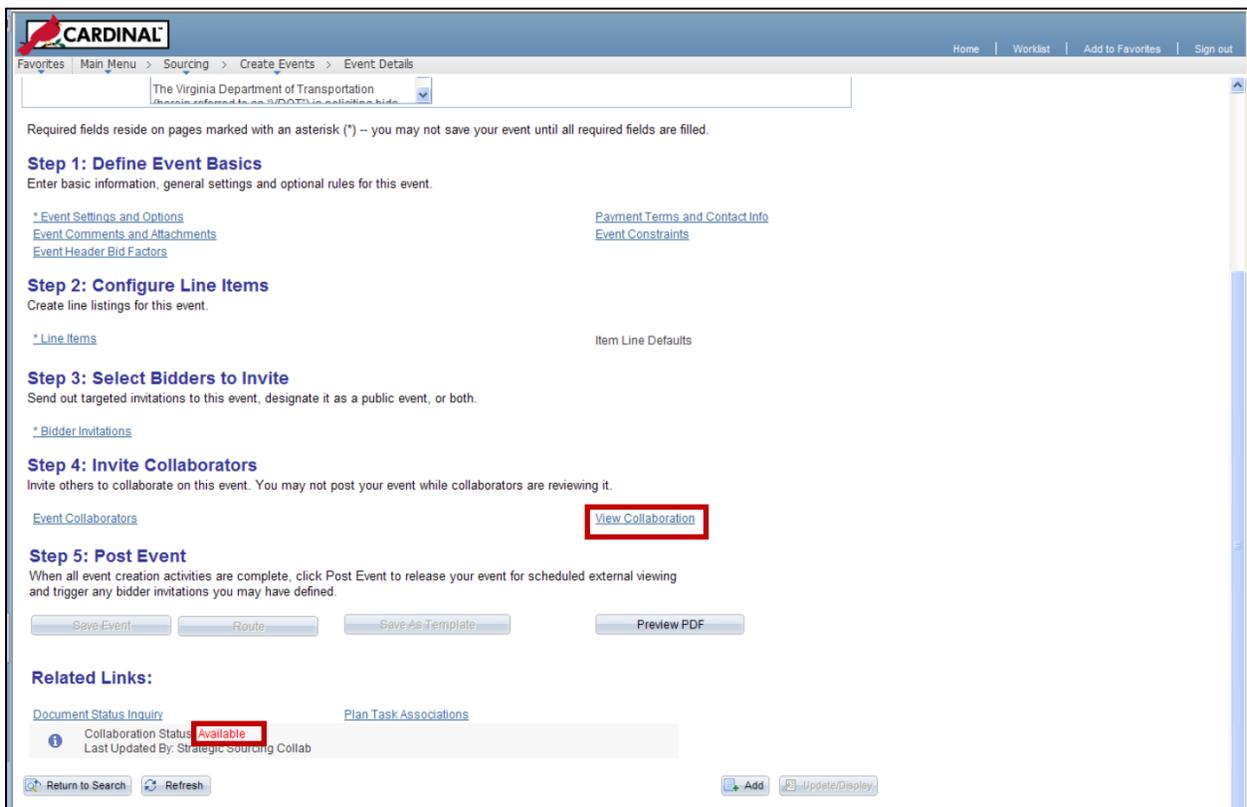
- \* [Line Items](#)

**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".

18 A routing message appears. To check in the event for the next Collaborator, click the **Yes** button.



**CARDINAL** Home | Worklist | Add to Favorites | Sign out

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

The Virginia Department of Transportation

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](#)
- [Event Comments and Attachments](#)
- [Event Header Bid Factors](#)
- [Payment Terms and Contact Info](#)
- [Event Constraints](#)

**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.

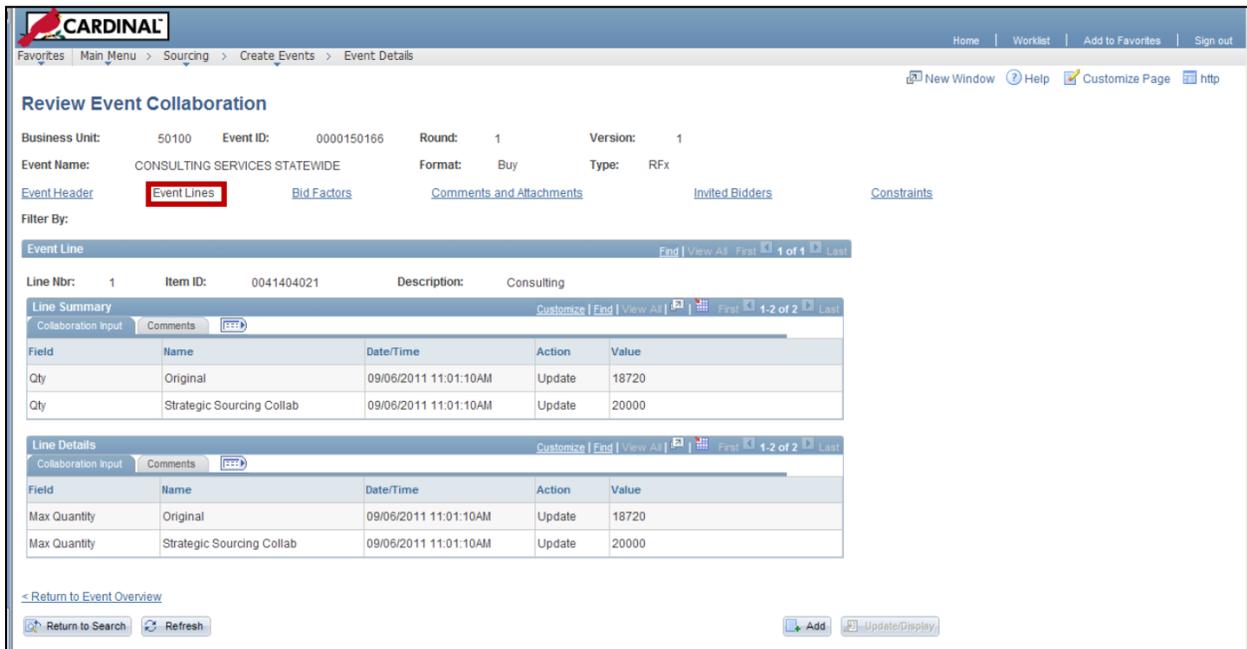
**Related Links:**

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

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

19 **Collaboration Status** changes to Available.

20 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

- 21 Click the **Event Lines** hyperlink to view the original amount and any changes to the quantity by Collaborators.
- 22 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

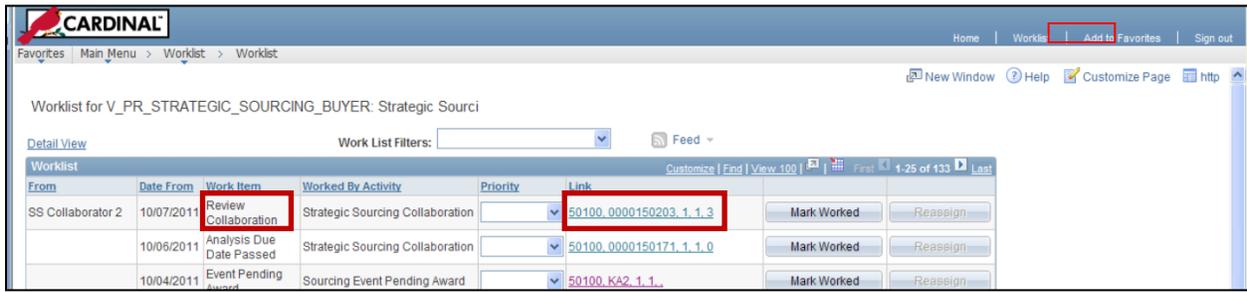
Return to Search Refresh Add Update/Display

- 23 Email notification and a worklist item are sent to the SS Buyer indicating that collaboration has been completed by all selected Collaborators.

### Review Collaboration:

To review collaboration on an event, click the **Review the completed collaboration** hyperlink, from the email notification or you may view the event from your worklist.

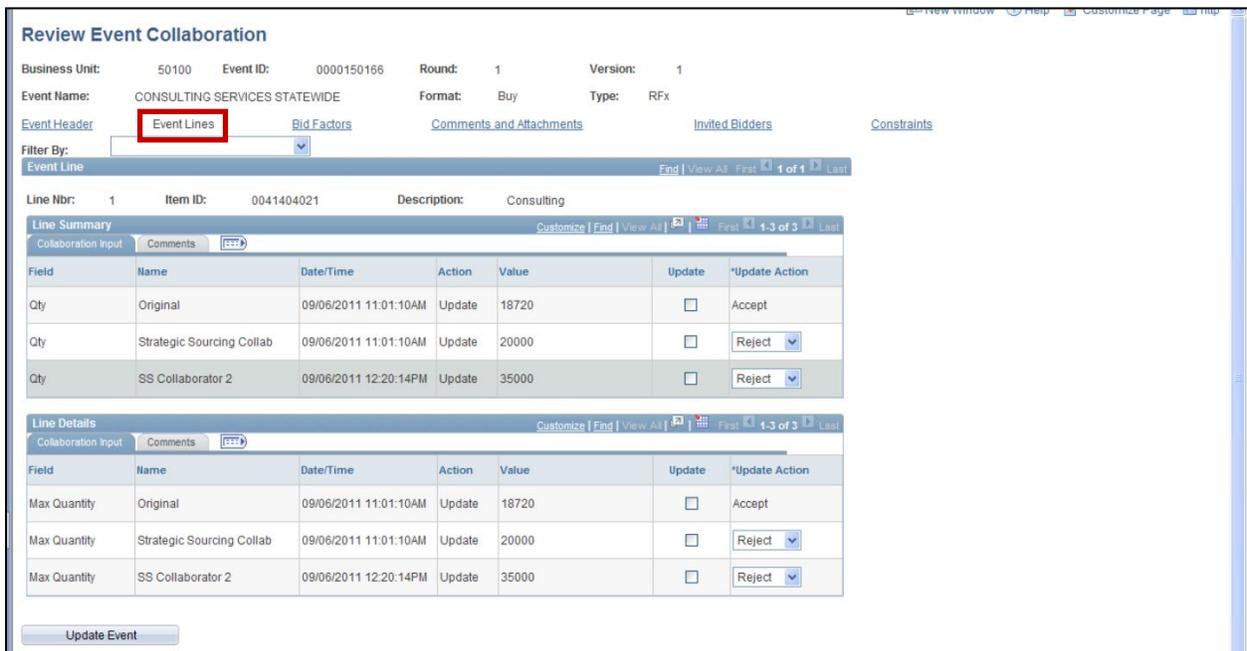
- 1 Navigate to **Main Menu > Worklist > Worklist**



Worklist for V\_PR\_STRATEGIC\_SOURCING\_BUYER: Strategic Sourci

From	Date From	Work Item	Worked By Activity	Priority	Link		
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_1.1.1.0	Mark Worked	Reassign
	10/04/2011	Event Pending Award	Sourcing Event Pending Award		50100_KA2_1.1.	Mark Worked	Reassign

- 2 Click the event hyperlink for the event you wish to review. Notice that the description located in the **Work Item** column is **Review Collaboration**.



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]

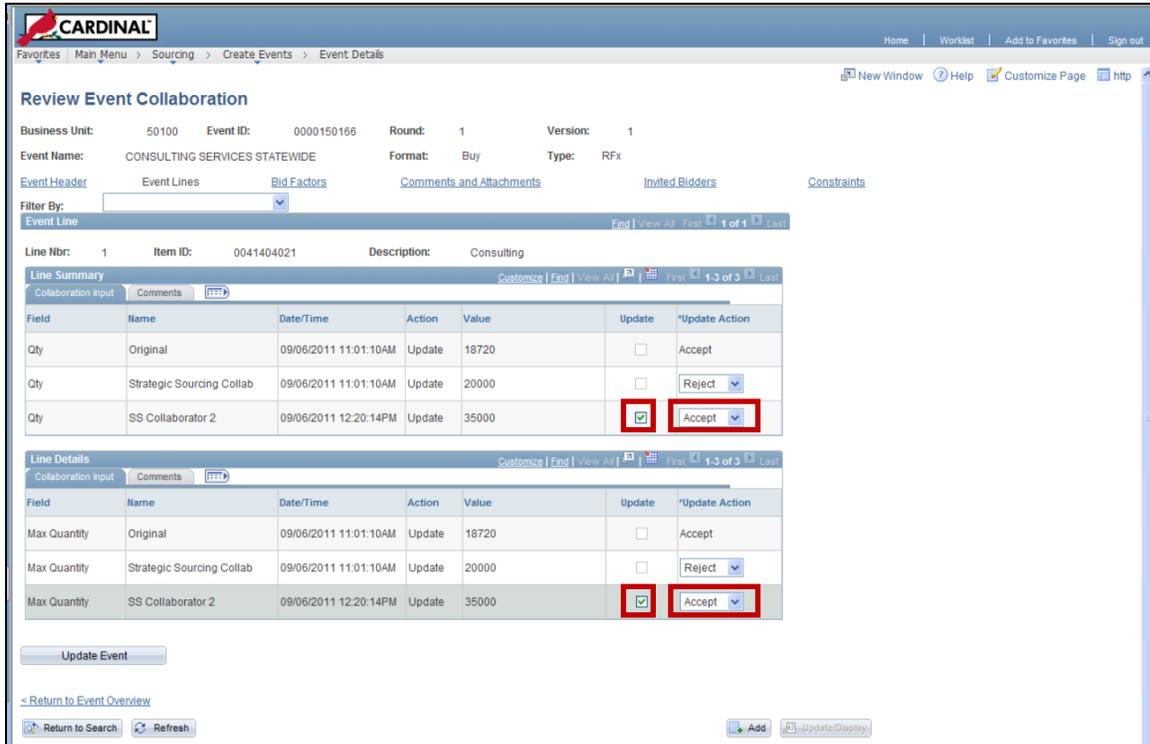
Event Line: 1 of 1

Line Nbr: 1 Item ID: 0041404021 Description: Consulting

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

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 | Constraints

Filter By: [Dropdown]

Event Line: [Dropdown] Find | View All | First 1 of 1 Last

Line Nbr: 1 Item ID: 0041404021 Description: Consulting

**Line Summary**

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**

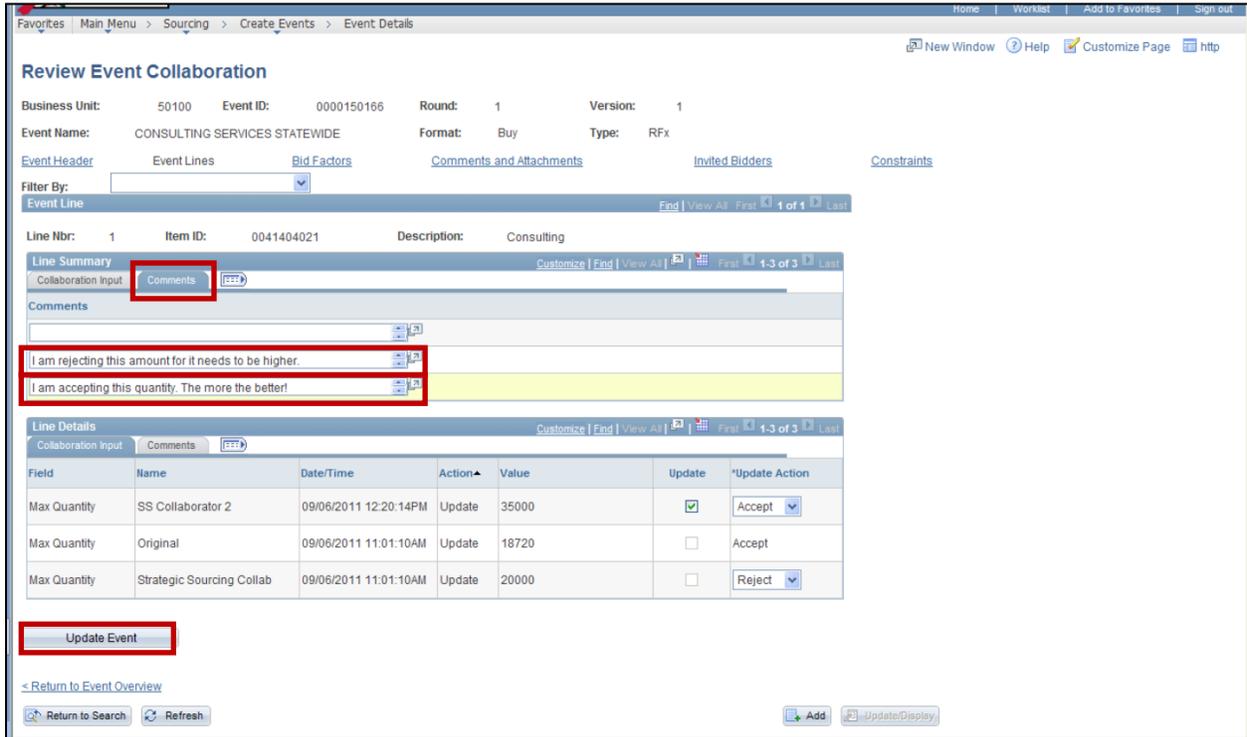
Field	Name	Date/Time	Action	Value	Update	Update Action
Max Quantity	Original	09/06/2011 11:01:10AM	Update	18720	<input type="checkbox"/>	Accept
Max Quantity	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000	<input type="checkbox"/>	Reject
Max Quantity	SS Collaborator 2	09/06/2011 12:20:14PM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

Update Event

[Return to Event Overview](#)

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

- 4 Review the collaboration edits.
- 5 To accept a change, change **Update Action** to **Accept** and check **Update** box.
- 6 To reject a change, change **Update Action** to **Reject** and check **Update** box.



**Review Event Collaboration**

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

Filter By: [Dropdown]

Event Line: 1 of 1

Line Nbr: 1 Item ID: 0041404021 Description: Consulting

Line Summary: Collaboration Input **Comments** [EFF]

Comments:

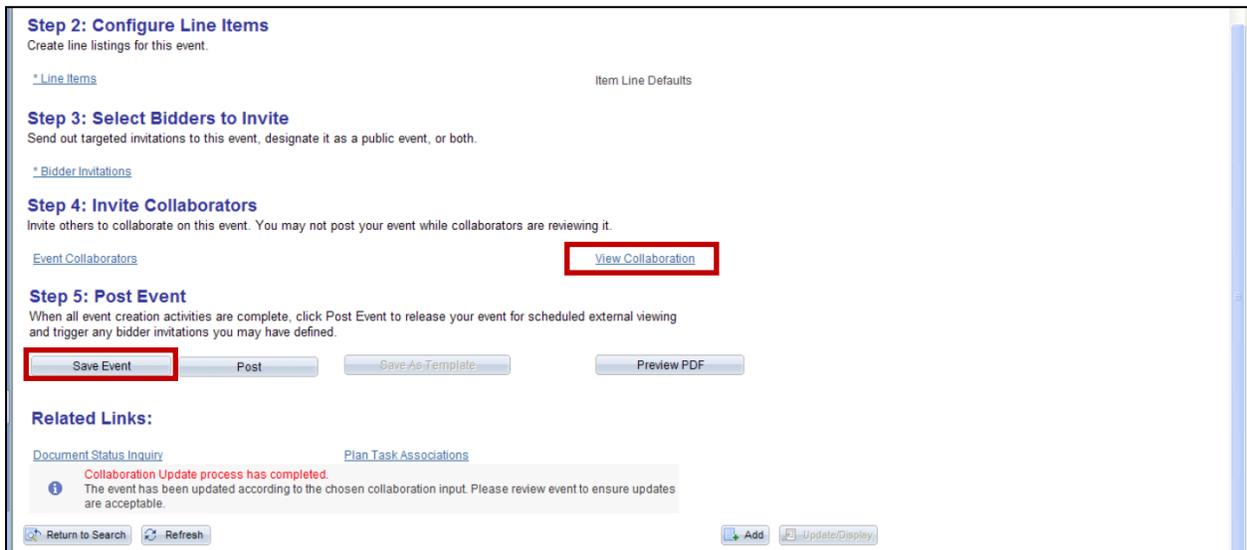
- I am rejecting this amount for it needs to be higher.
- I am accepting this quantity. The more the better!

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

- 7 Click the **Comments** tab and enter comments as applicable.
- 8 Click the **Update 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.

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.

- 9 After accepting or rejecting all edits, click the **Save Event** button. The event is saved and its status changes to *Collaboration Update process has completed*.
- 10 To review the edits made to the event, click the **View Collaboration** hyperlink.

**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

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

- 11 The collaboration actions appear with the action taken in the **Update Action** field. **NOTE:** You may click on any titled hyperlink to view the related collaboration.
- 12 The event can be posted for advertisement following the normal Strategic Sourcing process. **NOTE:** The system will show the countdown in the **Status** field from the **Event Workbench** page, which indicates how much time is left for collaboration.

### Invite Collaborators:

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 pricing. The Bid Processor enters the responses into Cardinal and notifies the SS Buyer. The SS Buyer analyzes the responses and may invite Collaborators for approvals or comments, prior to making the award. The SS Buyer may select Collaborators as necessary, such as:

- Customer (user) for comments
- Manager for approval
- RFP Evaluation Committee members for scoring.

**13** Navigate to **Main Menu > Sourcing > Maintain Events > Event Workbench**

**Event Workbench**

Search Criteria

Event ID: %204 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

Search Results

Event ID	Name	Format	Type	Unit	Status
02PR0204	02PR02.04 Script	Buy	RFX	50100	Awarded
0000150204	CONSULTING SERVICE... Buy	RFX		50100	0 hrs, 0 mins, 5 secs

**14** Search for the event using the any combination of search criteria.

**15** Click on the **Analyze Bids** icon to analyze the totals of the event. You cannot analyze responses of events with a status of **Open**.

**Analyze Total**

Analyze Total [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: Pending Award   
 Bid Analysis and Display Options

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
Total Event Score:	100.0000	33.3000
Total Header Cost:	0.00	0.00
Total Header Score:	100.0000	33.3000

Bid Action: NA NA   
 Reject Reason:   
 Award by Percent:   
 Hide Bid:

Factors

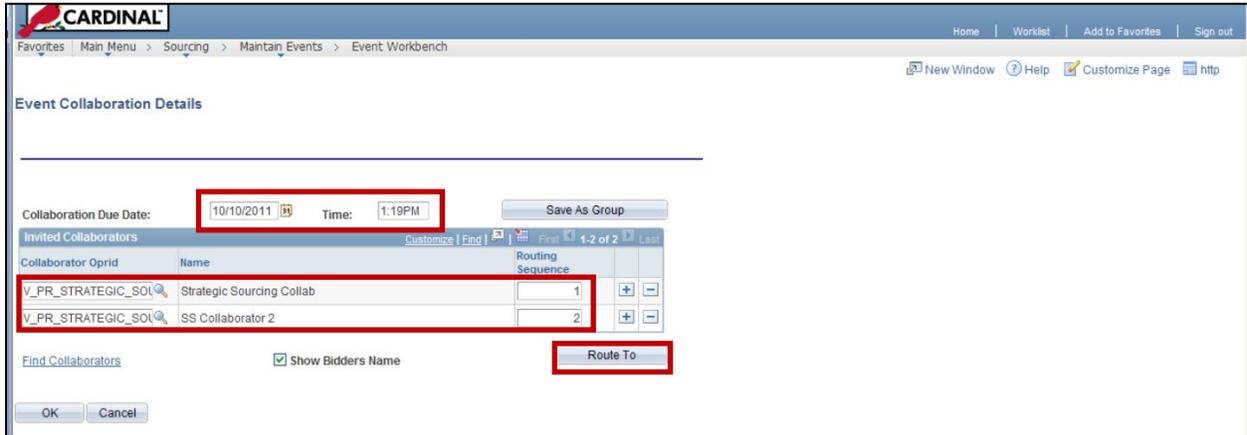
Recalculate Add / Edit Factors Unhide Bids

Save Return to Search

Analyze Total | Analyze Line

**16** Click the **Invite Collaborators** link from the **Go To** drop down menu.

**NOTE:** Collaborators may have previously reviewed and scored each response outside of Cardinal. Each Collaborator enters their scores into Cardinal for calculation.



Event Collaboration Details

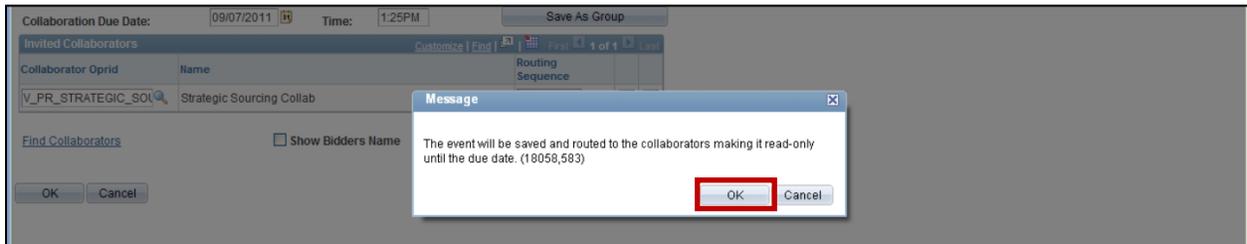
Collaboration Due Date: 10/10/2011 Time: 1:19PM Save As Group

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

Find Collaborators  Show Bidders Name **Route To**

OK Cancel

- 17 Clear all existing names in the **Collaborator Oprid** field.
- 18 Enter the Collaborator name (use the **Look Up** icon, if needed) for analysis collaboration. The **Routing Sequence** number is automatically populated.
- 19 Enter a Collaboration Due Date and Time for a response deadline.
- 20 Click the **Route To** button.



Collaboration Due Date: 09/07/2011 Time: 1:25PM Save As Group

Collaborator Oprid	Name	Routing Sequence
V_PR_STRATEGIC_SOI	Strategic Sourcing Collab	

Find Collaborators  Show Bidders Name

OK Cancel

**Message**

The event will be saved and routed to the collaborators making it read-only until the due date. (18058,583)

OK Cancel

- 21 A routing message appears to make the event read-only until the Collaboration Due Date. Click the **OK** button.

**Analyze Total**

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

**Analysis**

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

**Factors**

Recalculate | Add/Edit Factors | Unhide Bids

**The event has been successfully routed for collaboration.**

Save | Return to Search

- 22 The event is grayed out and has been routed for collaboration.
- 23 An item is added to each Collaborator's worklist. **NOTE:** Collaborators may score the event in any sequence or at any time, prior to the due date.

### Collaborate on Event Response:

- 1 An email notification and a worklist item are added to the Collaborators' worklists indicating that collaboration is needed.
- 2 Navigate to the worklist. **Main Menu > Worklist > Worklist**

Worklist for V\_PR\_STRATEGIC\_SOURCING\_COLLAB: Strategic Sourc

Detail View | Work List Filters: | Feed

From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
Strategic Sourcing Buyer	10/07/2011	Analysis Collaboration	Sourcing Analysis Collaboration		50100_0000150204_1_1	Mark Worked	Reassign
Strategic Sourcing Buyer	10/08/2011	Checkout Event Collaboration	Strategic Sourcing Collaboration		50100_0000150202_1_1_1	Mark Worked	Reassign
Strategic Sourcing Buyer	10/03/2011	Checkout Event Collaboration	Strategic Sourcing Collaboration		50100_0000150199_1_1_1	Mark Worked	Reassign

- 3 Click the event hyperlink for the event you wish to collaborate on responses for. The event must be listed as **Checkout Event Collaboration** under the **Work Item** column.

**Analyze Total**

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

**Bid Analysis and Display Options**

Header Weighting: 100.00000 | Sort Bids By: Total Event Score | Sort Order: Descending | **Analyze**

Display Options:  View Factor Responses |  Display Delta Responses |  Display Disqualified Bids |  Display Withdrawn Bidders

View Bid Actions:  All Bid Actions |  Award |  Counter |  Disallow |  Reject |  <No Action>

**Analysis**

	George Maker	Vision Communication2
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
Total Event Score:	100.0000	133.3000
Total Header Cost	0.00	0.00
Total Header Score:	100.0000	33.3000

Bid Action: NA | NA

Reject Reason: |

Award by Percent: |

Hide Bid:  |

**Factors**

Weighting: UOM Ideal

PLEASE DESCRIBE YOUR PARTICIPATION AND PERCENT OF SMALL, WOMEN-OWNED AND MINORITY BUSINESSES FOR THIS RFP:

100.00000 P1 100 100.00 33.30

Buttons: Recalculate | Analysis Complete | Unhide Bids | << | < | > | >>

- 4 The **Analyze Total** page appears. Review the total pricing and bid factors. If applicable, text bid factors would be scored here.
- 5 Click the **Analyze** hyperlink.

**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 Items**

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	<b>Analyze</b>

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

Analyze Total | Analyze Line

- 6 To analyze each responses by line, click the **Analyze Line** hyperlink.

**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:** [ ]

**Analysis**

	Vision Communication2	George Maker
<b>Bidder Name:</b>		
<b>Event Version:</b>	1	1
<b>Bid Number:</b>	1	1
<b>Bid Quantity:</b>	2,080.0000	2,080.0000
<b>Minimum Bid Quantity:</b>	0.0000	0.0000
<b>Total Bid Amount:</b>	348,400.0000	393,120.0000
<b>Total Bid Cost:</b>	0.00	0.00
<b>Total Line Score:</b>	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]		
[189.00]		

**Buttons:** Recalculate, Unhide Bids, <<, <, >, >>, OK, Cancel, Apply

7 Review the line information price.

8 Click the **OK** button.

**Analyze Total**    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:** [ ]

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

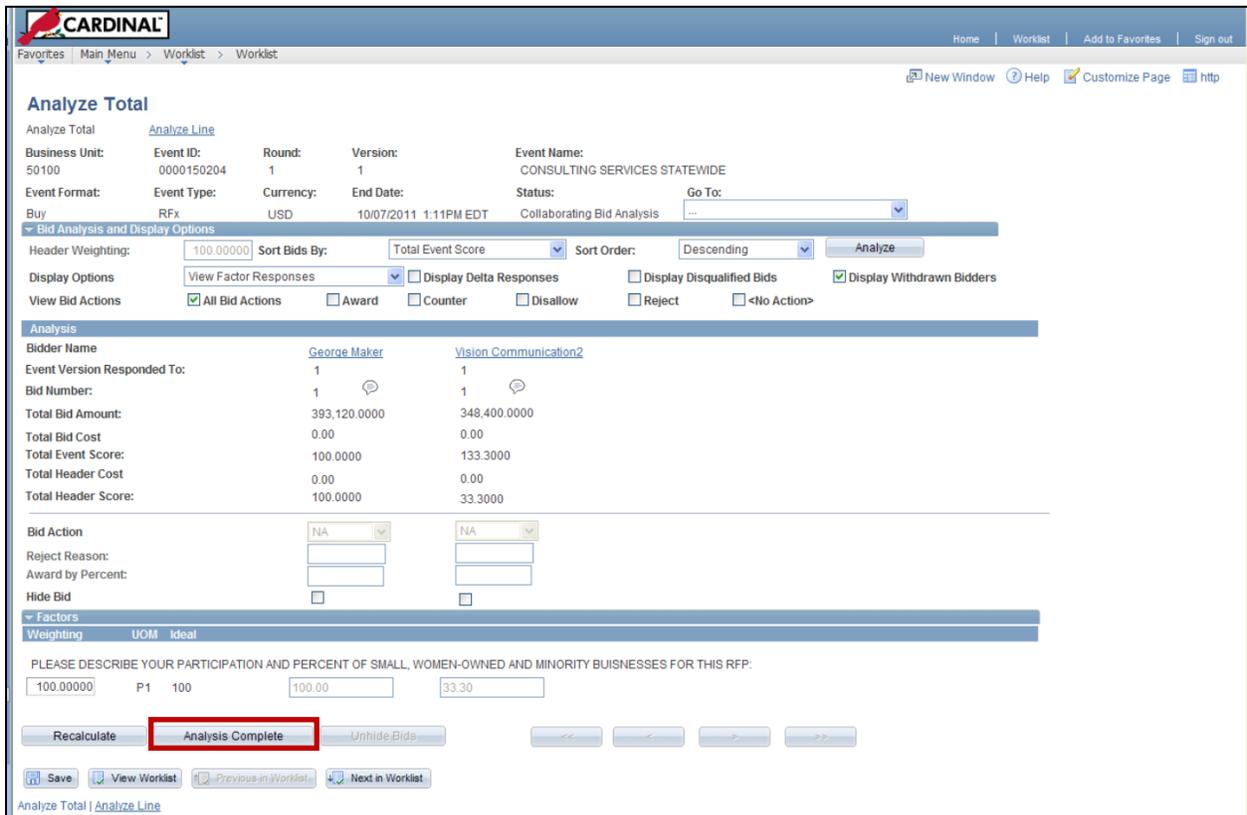
**Buttons:** Save, View Worklist, Previous in Worklist, Next in Worklist

9 To enter comments on the responses line, click on the **Item Description** icon.

**NOTE:** Any comments you enter here are carried over to any events that are copied from this one in the future. It is therefore recommended to not use the copy functionality on events with comments added with the item description.



- 10 Enter a comment.
- 11 Click the **OK** button.



**Analyze Total**

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

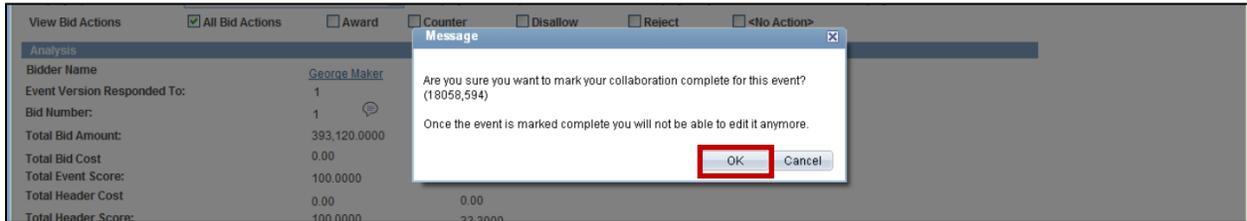
Bidder Name	George Maker	Vision Communication2
Event Version Responded To:	1	1
Bid Number:	1	1
Total Bid Amount:	393,120.0000	348,400.0000
Total Bid Cost:	0.00	0.00
Total Event Score:	100.0000	133.3000
Total Header Cost:	0.00	0.00
Total Header Score:	100.0000	33.3000

PLEASE DESCRIBE YOUR PARTICIPATION AND PERCENT OF SMALL, WOMEN-OWNED AND MINORITY BUSINESSES FOR THIS RFP:

100.00000	P1	100	100.00	33.30
-----------	----	-----	--------	-------

**Analysis Complete**

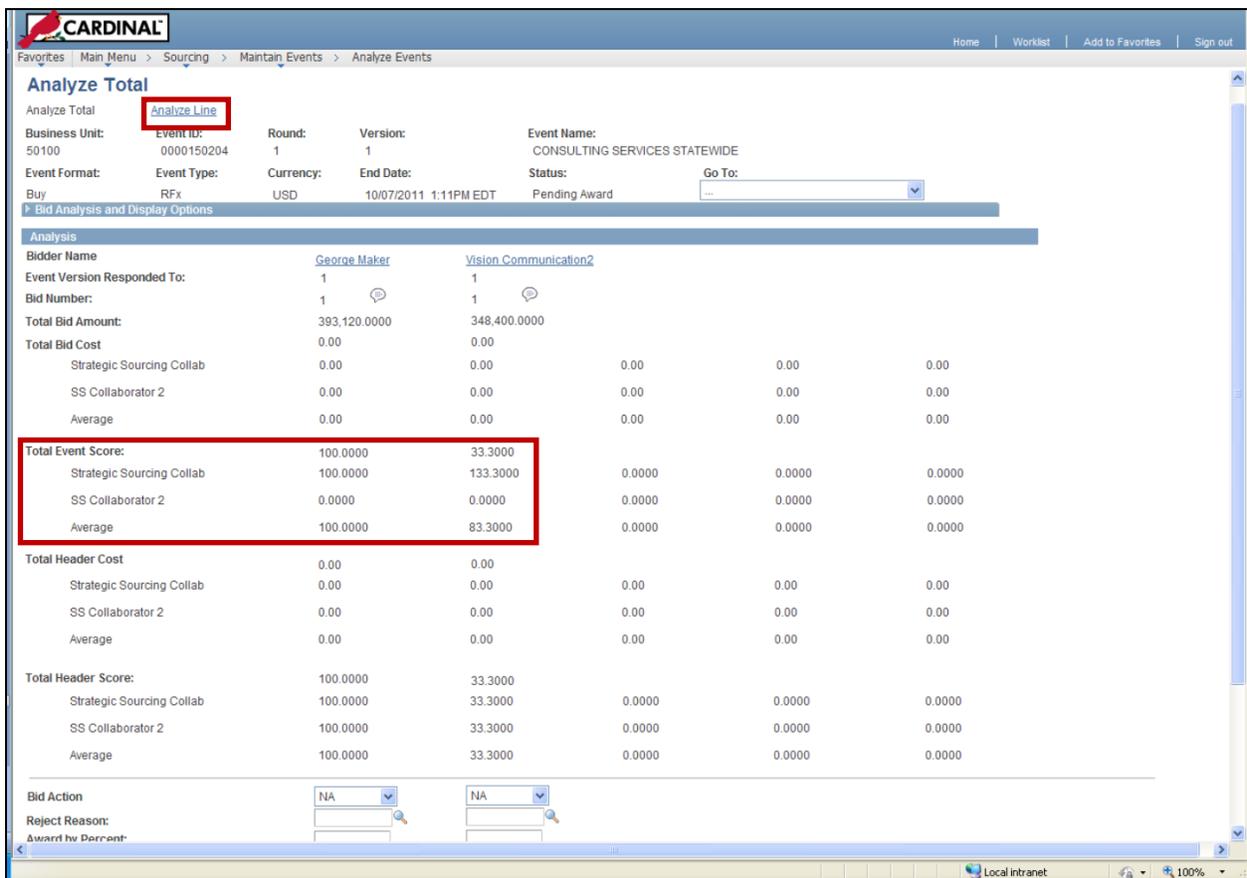
- 12 After you have reviewed all of the event responses and entered comments, click the **Analysis Complete** button.
- 13 An email notification and a worklist item are added to the SS Buyer worklist indicating that collaboration is complete by all selected Collaborators.



- 14 A message appears. Click the **OK** button to confirm that you do not wish to make further edits.

### Review/Analyze Collaboration:

- 1 To review collaborator input on responses, navigate to *Main Menu > Worklist > Worklist*
- 2 Click the **Event Analysis Collaboration** hyperlink from the email notification or click the item in the worklist that has **Analysis Collaboration** listed in the **Event Status** column.



- 3 View Collaborator scores, as applicable.
- 4 Click the **Analyze Line** hyperlink.

**Analyze Line**

[Analyze Total](#)

Event ID: 50100  
Event Format: Buy  
Event Type: RFX  
Round: 1  
Currency: USD  
Version: 1  
End Date: 10/07/2011 1:11PM EDT  
Event Name: CONSULTING SERVICES STATEWIDE  
Status: Pending Award

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 MH 10/7/11 This is Approved DEM Director 10/7/11	0041404	HUR	0.01000	2,080.0000	0.0000	0.00000	Open	Analyze

- Collaborator comment(s) appear in the **Description** field of each line.
- After reviewing the scores and comments, click the **Analyze Total** hyperlink.

**Analysis**

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

Bid Action:

Reject Reason:

Award by Percent:

Hide Bid:

Factors:

- Follow normal Strategic Sourcing processes to make the award.

For more information, see the **PROC347: Strategic Sourcing** course.