Strategic Sourcing Collaboration Overview

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

The SS Buyer who is responsible for the event may not have all of the information that is critical to the event. In those circumstances, the SS Buyer may choose to distribute the event to the stakeholders for input prior to posting the event. This allows them 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.

The SS Buyer can accept or reject suggested changes by a Collaborator. 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 entitled **PR345: Strategic Sourcing**, located on the Cardinal website in **Course Materials** under **Training**.

Table of Contents

Event Collaboration 2
- Invite Event Collaborators (SS Buyer) 2
- Collaborate on an Event 7
- Review Event Collaboration (SS Buyer) 14

Bid Analysis Collaboration 19
- Invite Collaborators for Bid Analysis (SS Buyer) 19
- Collaborate on Bid Analysis 23
- Review Bid Analysis Collaboration (SS Buyer) 27

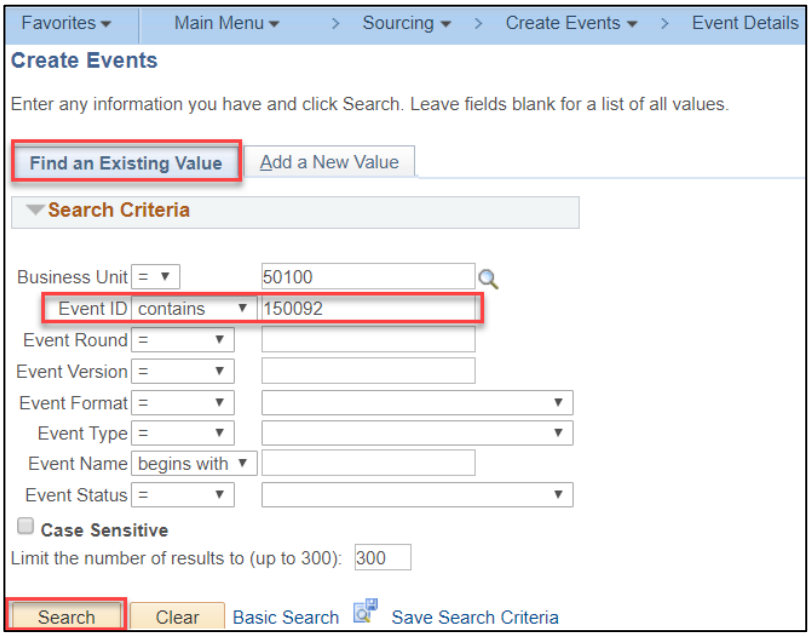
Event Collaboration

Invite Event Collaborators (SS Buyer)

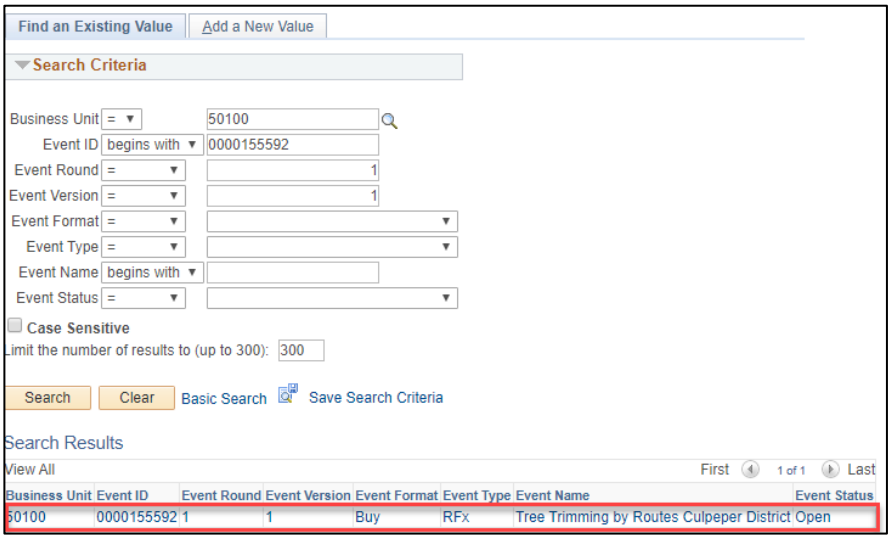
The SS Buyer selects users with the Event Collaborator role and adds them to an event that is being created. Events do not route to managers, or other users, unless they are selected as a Collaborator.
A routing sequence is established as you invite the Collaborators. You may modify the sequence to ensure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

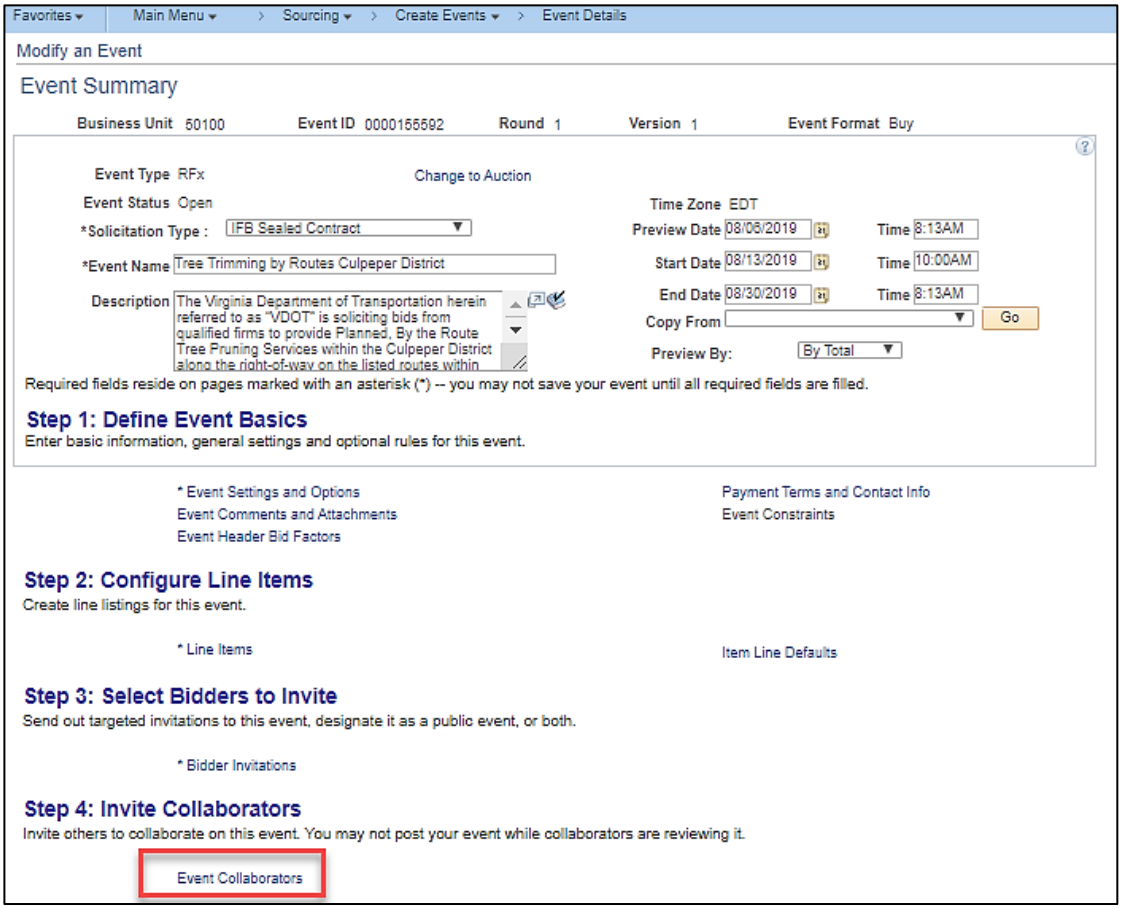


2. Click the **Find an Existing Value** tab to find and open an existing event.
3. The **Business Unit** field will default, do not change this value.
4. Enter search criteria, such as **Event ID**, for the event.
5. Click the **Search** button.

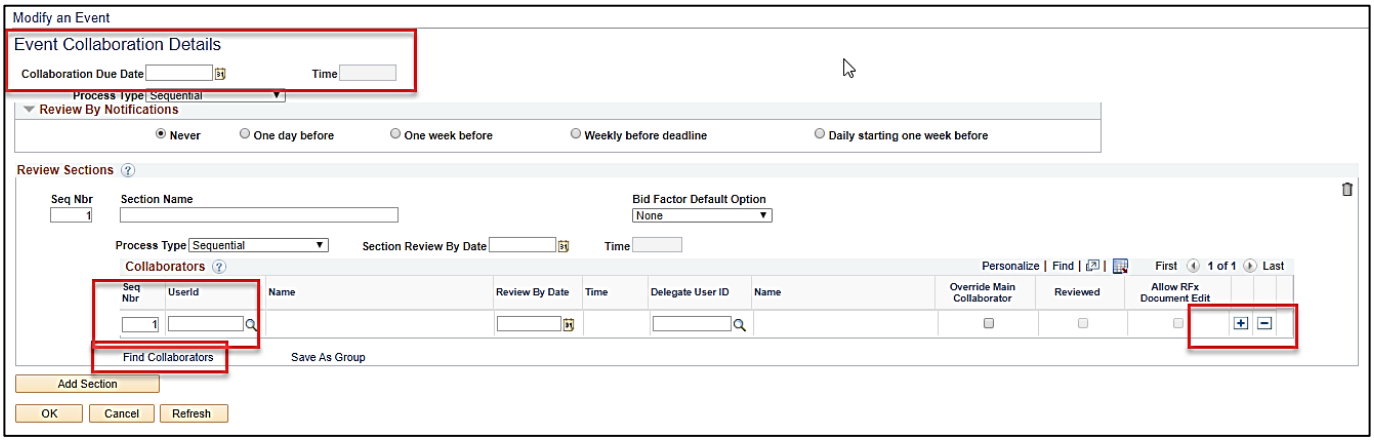


6. Select an **Event** with a status of **Open**.

7. The Create an Event – Event Summary page displays.



8. Click the Event Collaborators hyperlink. The Create an Event – Event Collaboration Details page displays.

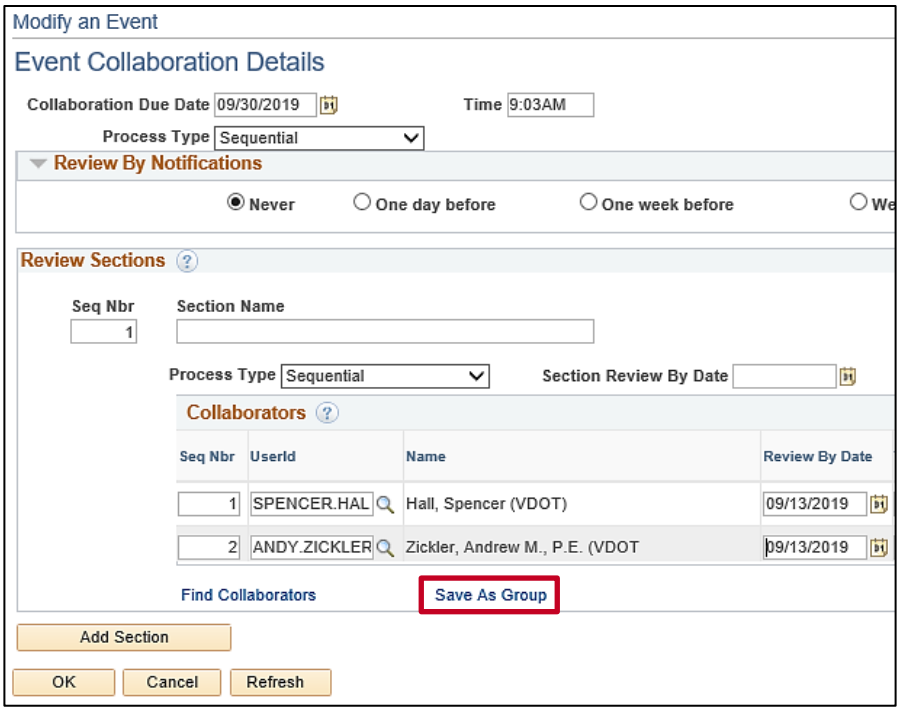


9. In the **Collaboration Due Date** field, enter a deadline date and time for all collaboration to end. The **Collaboration Due Date** must be <u>prior</u> to the event Preview Date.

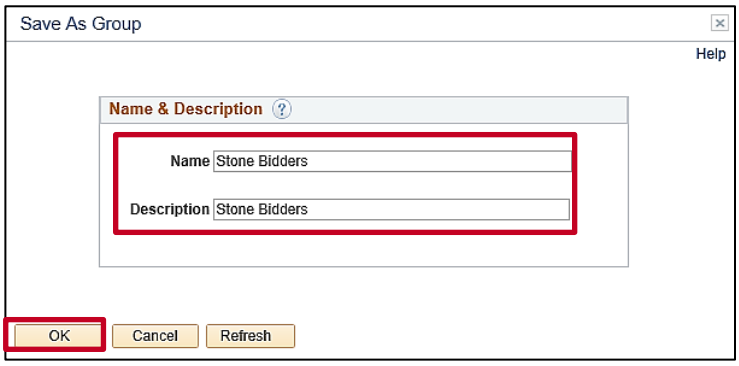
10. In the **Collaborators** section, enter the name of the user you wish to invite to collaborate on the event. You can use the magnifying glass for the **UserId** field to find a user. If you have previously set up a **Collaborator Group** you may access the group by clicking the **Find Collaborators** hyperlink.

11. 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.

12. The routing sequence number (**Seq Nbr**) 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.



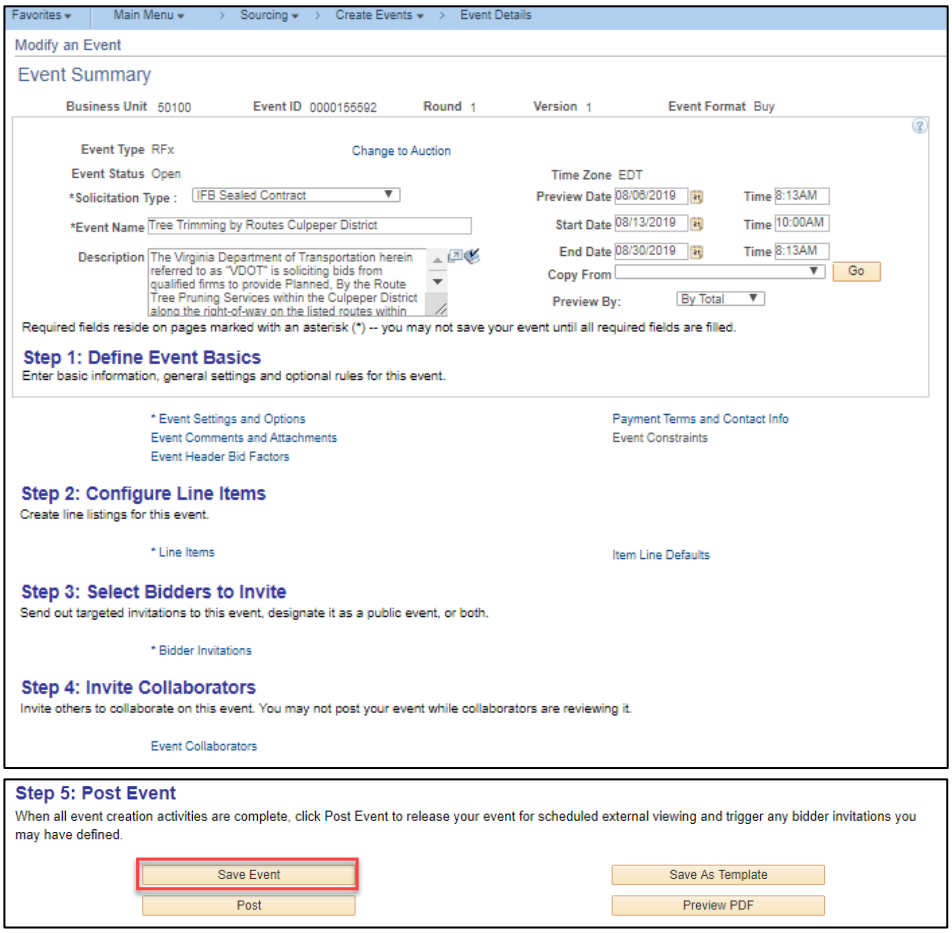
13. If you wish to save the selected Collaborators as a group for future use, click the **Save As Group** hyperlink. Two new fields, **Name** and **Description**, appear in a pop-up window.



14. Enter a group name in the **Name** field.

15. Enter a brief description of your group in the **Description** field.

16. 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.



17. 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**.

18. Click the **Route** button 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.

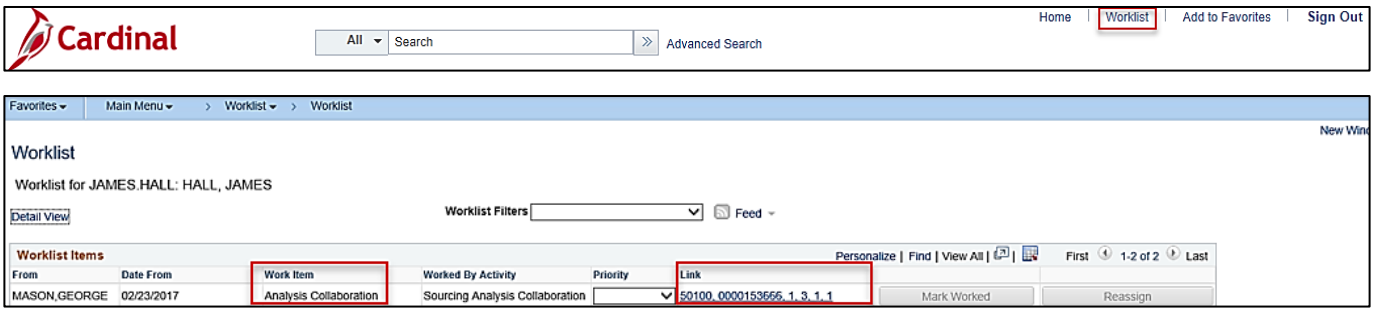
19. As the event creator, you will receive a message when all collaboration is complete.

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.

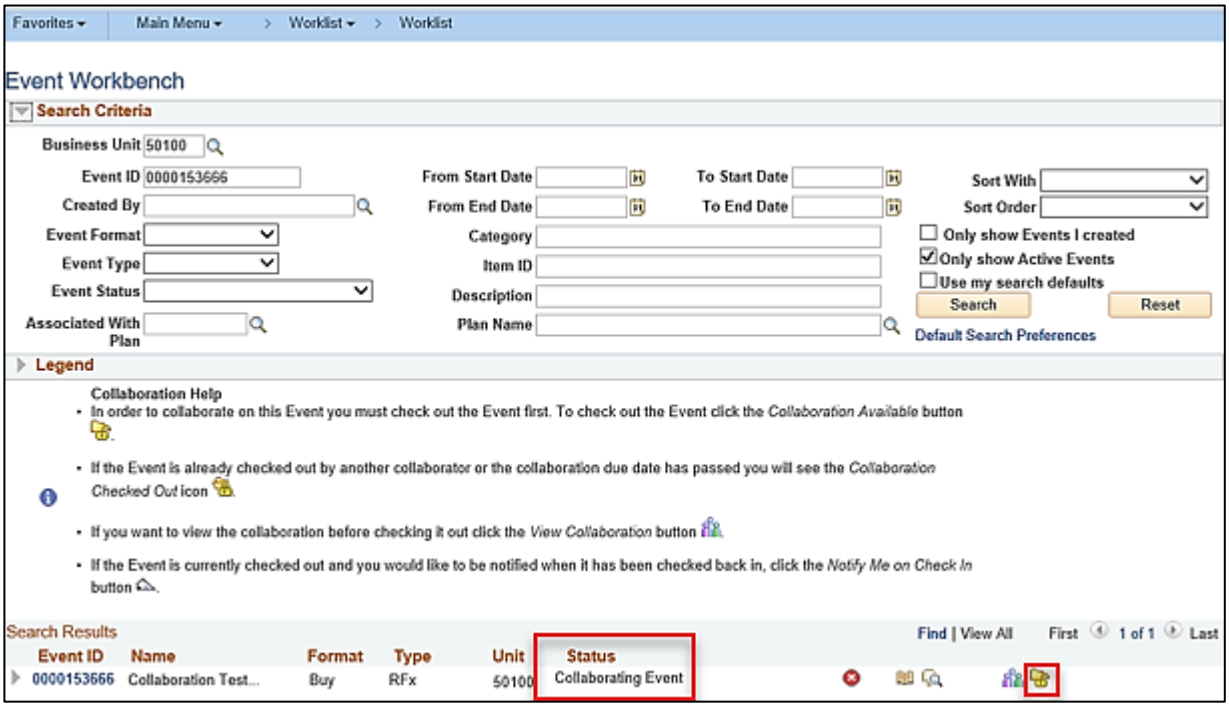
As an **Event Collaborator,** to access the event you have multiple options:

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



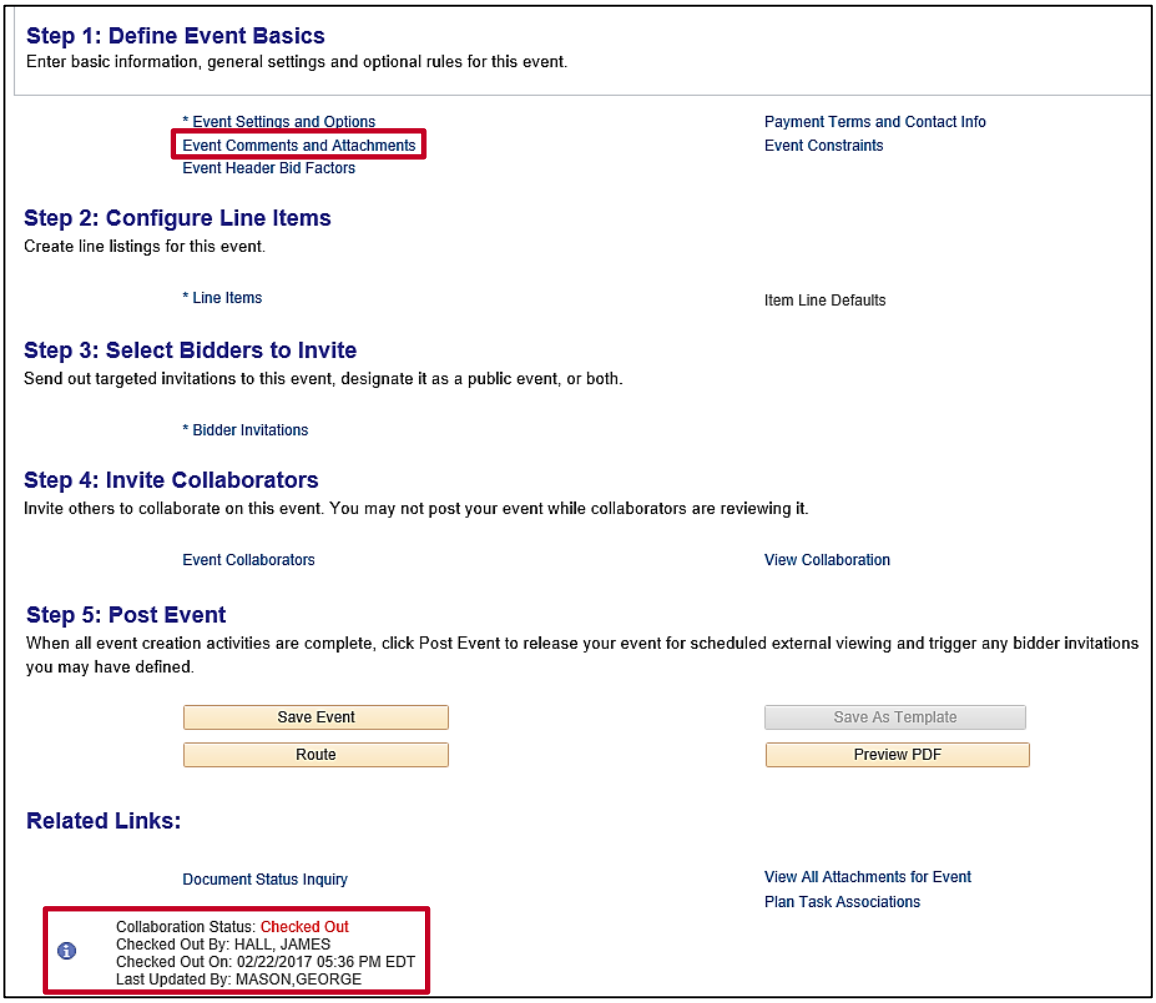
1. To access the event using your **Worklist**, click the **Worklist** hyperlink in the top right hand corner of the page. Your **Worklist** displays.
2. Under the **Work Item** column, the event will be listed as **Checkout Event Collaboration**. Click the **Link** column hyperlink on the row with the event you wish to collaborate on.

3. The **Event Workbench** page displays for the selected event.



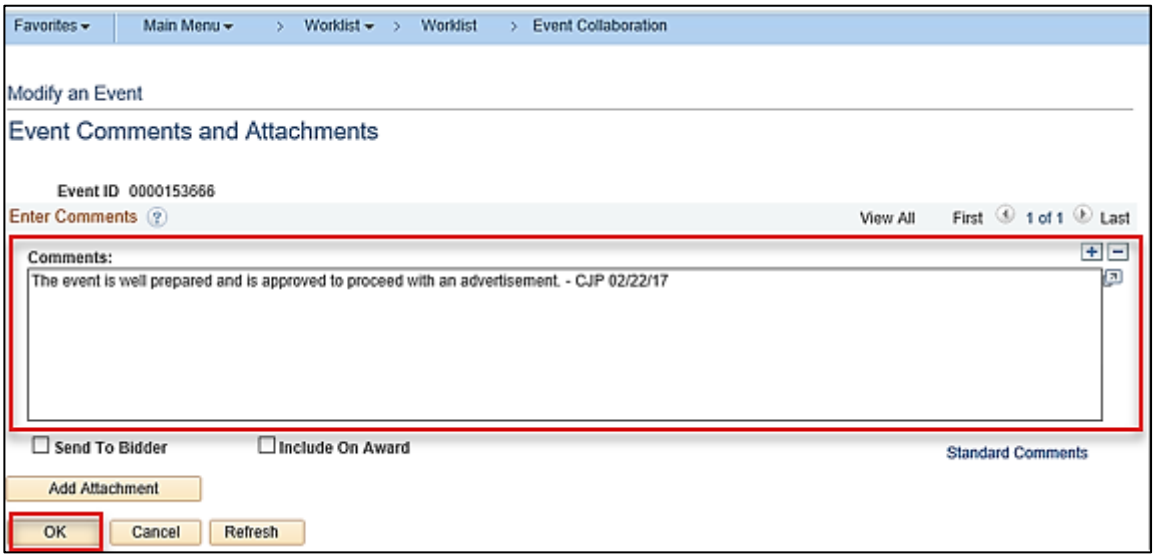
4. On the **Event Workbench** page, depending on the stage of the event, the collaboration countdown time displays in the **Status** field.

5. To collaborate on the event, click the Collaboration Available (Available for checkout) button. The Modify an Event – Event Summary page displays.

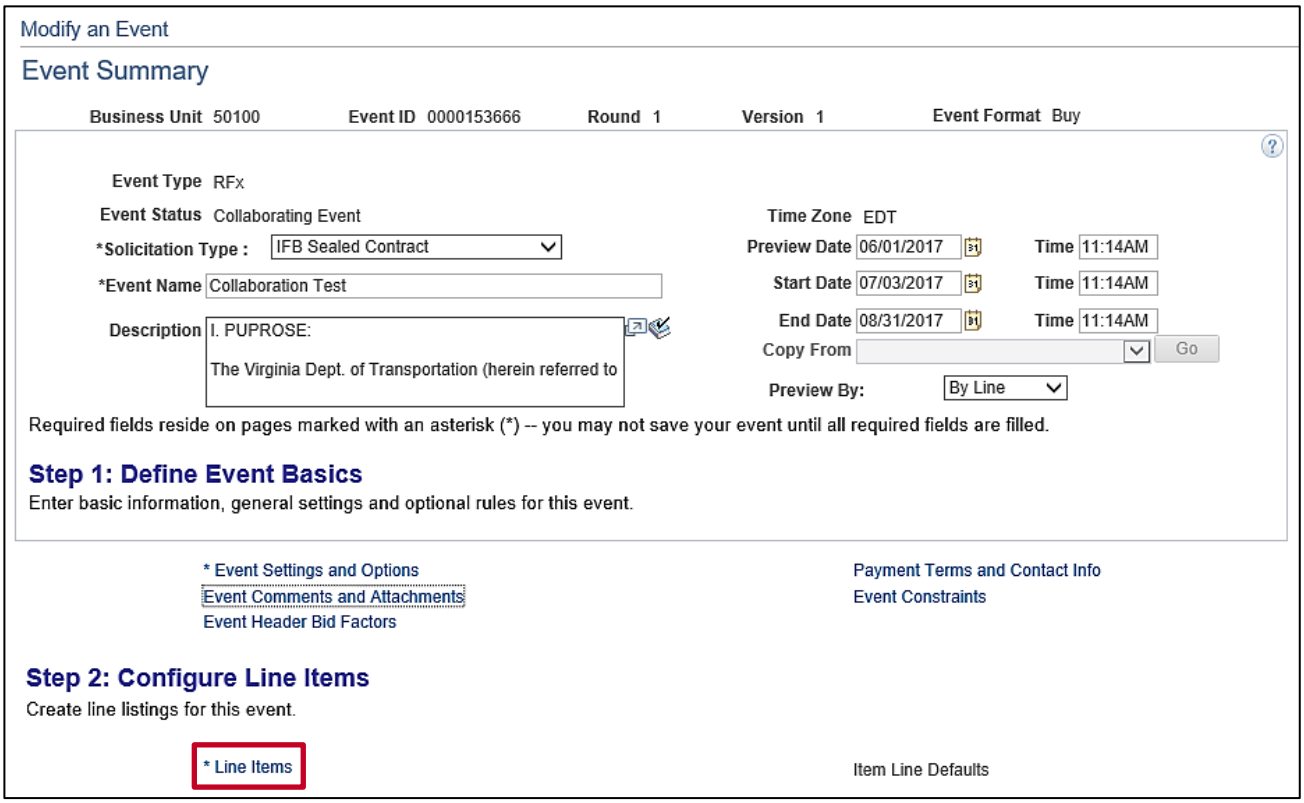


6. On the **Modify an Event – Event Summary** page you see that the **Collaboration Status** is **Checked Out** along with details about the checkout, such as when and by whom.

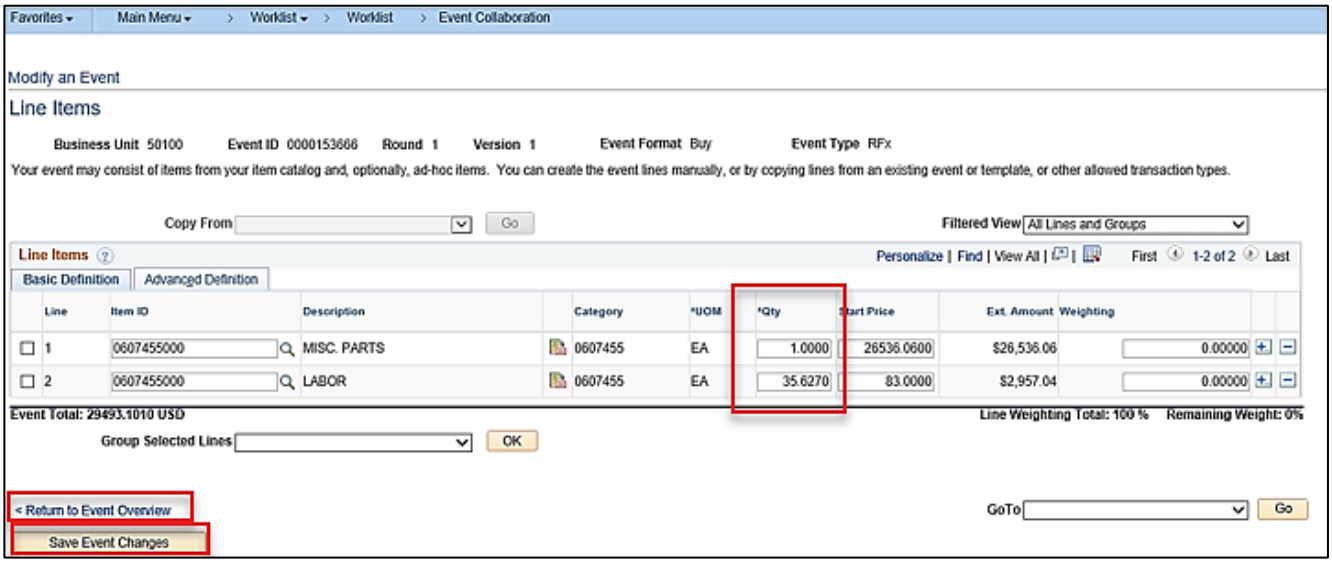
7. To make edits or add comments, click the **Event Comments and Attachments** hyperlink under **Step 1**.



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



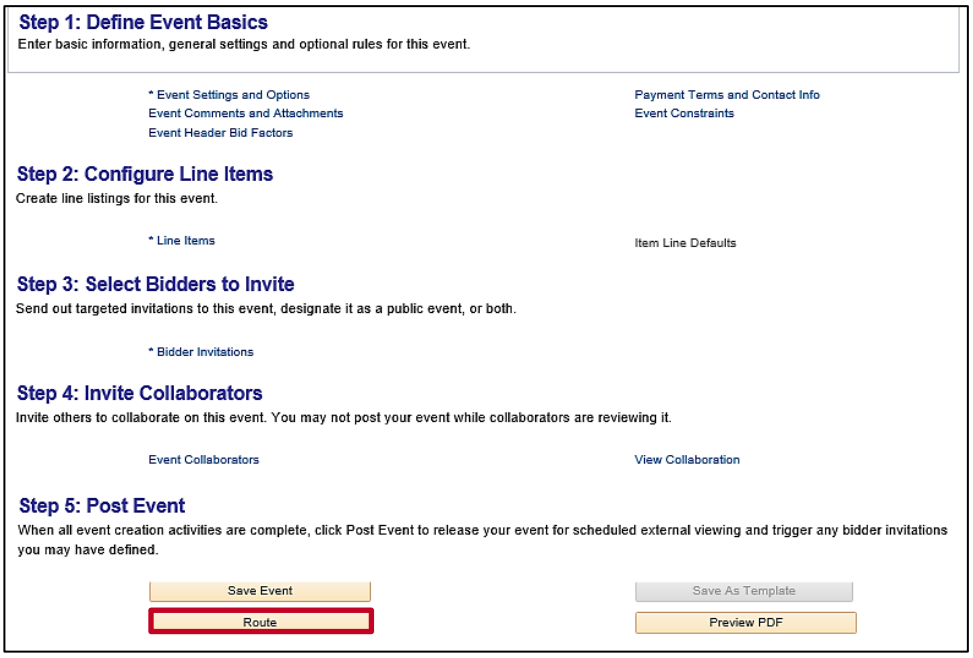
10. To modify event lines, click the **Line Items** hyperlink under **Step 2**. The **Modify an Event – Line Items** page displays.



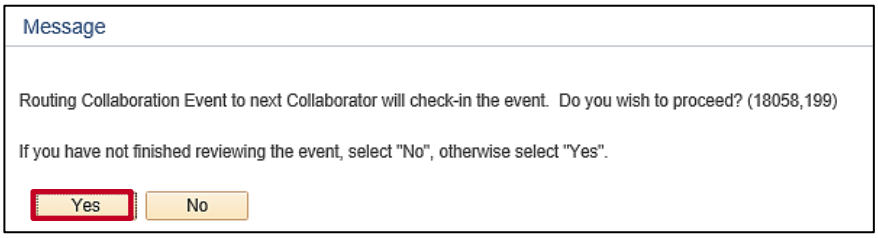
11. You may update the **Qty** field (i.e., line quantity) for each line if needed.

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

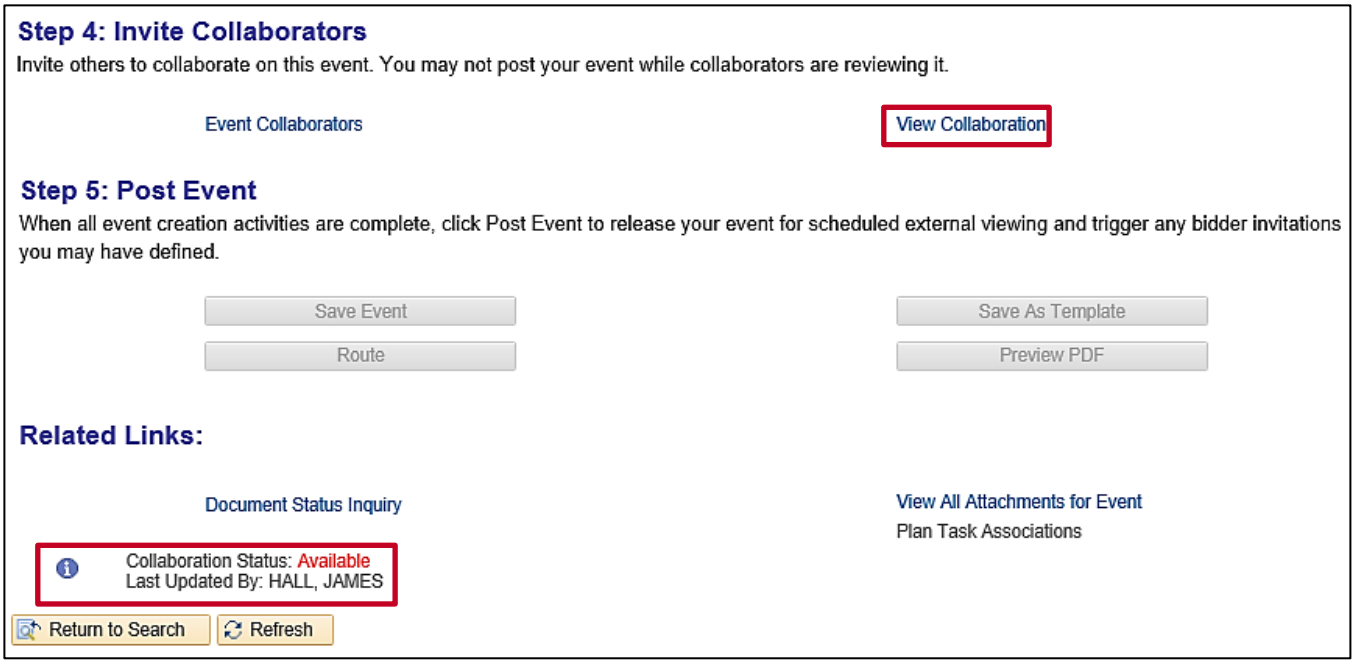
13. Click the Return to Event Overview hyperlink. The Modify an Event – Event Summary page displays.



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

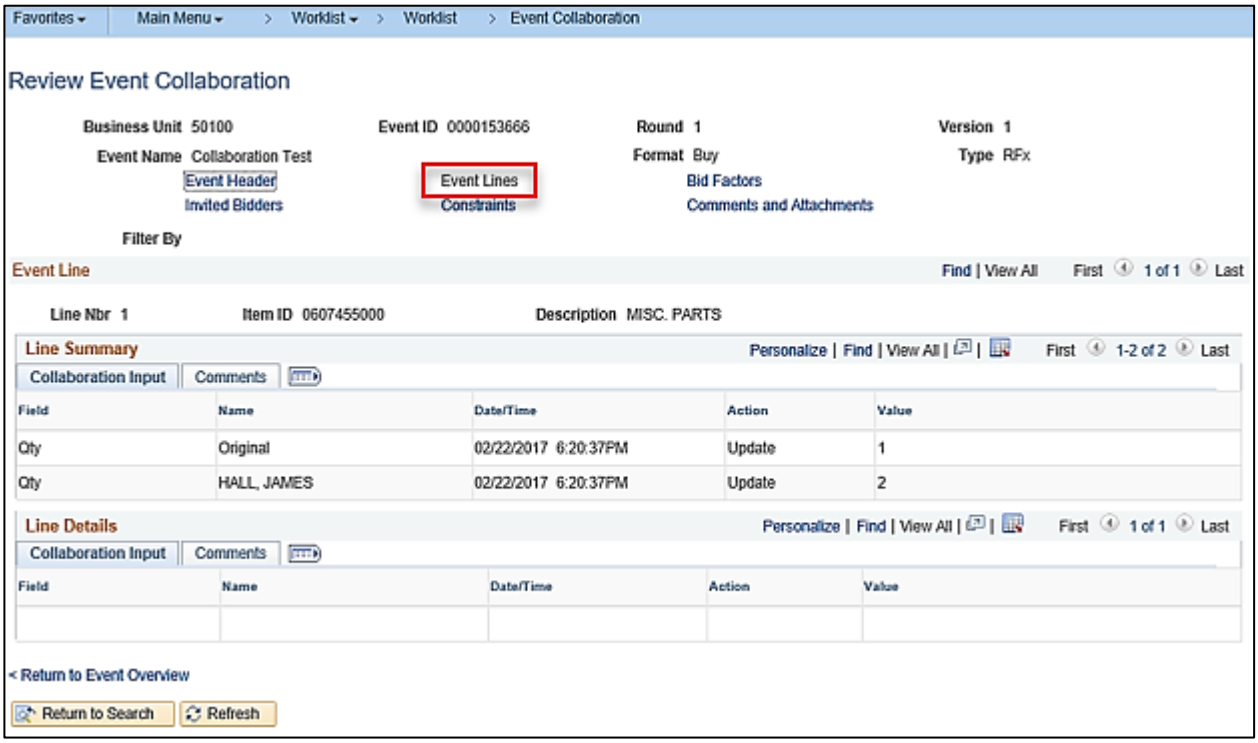


15. To check in the event and send it to the next Collaborator, click the **Yes** button. The **Modify an Event – Event Summary** page displays.

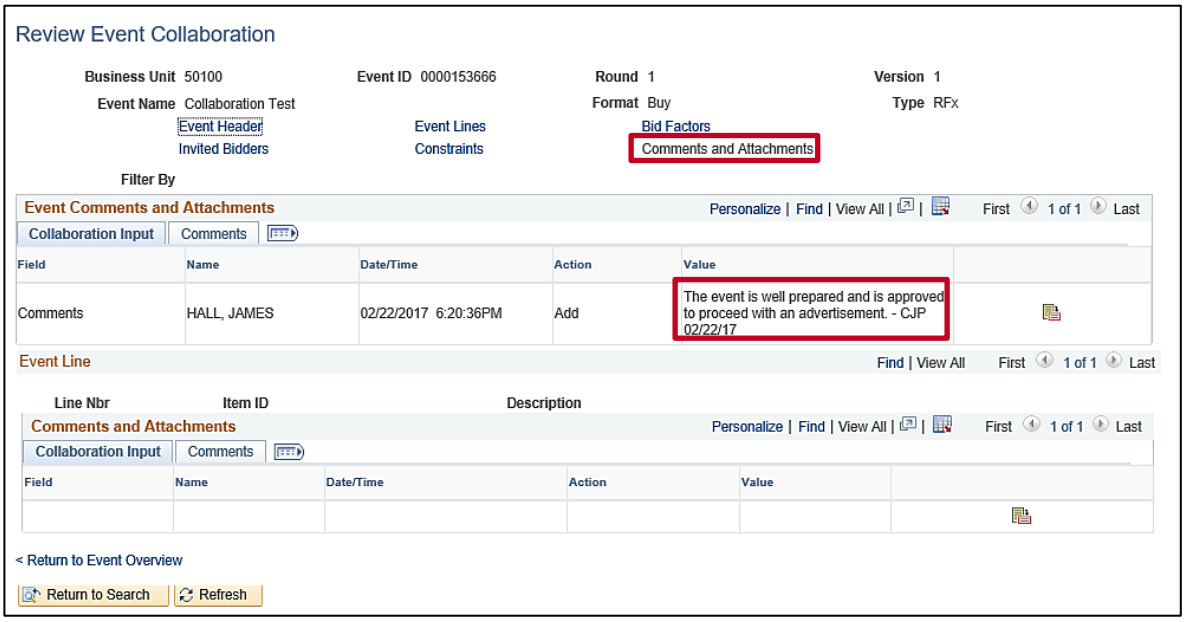


16. The event's Collaboration Status updates to Available.

17. Click the **View Collaboration** hyperlink to see any collaboration changes and comments.



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.

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.

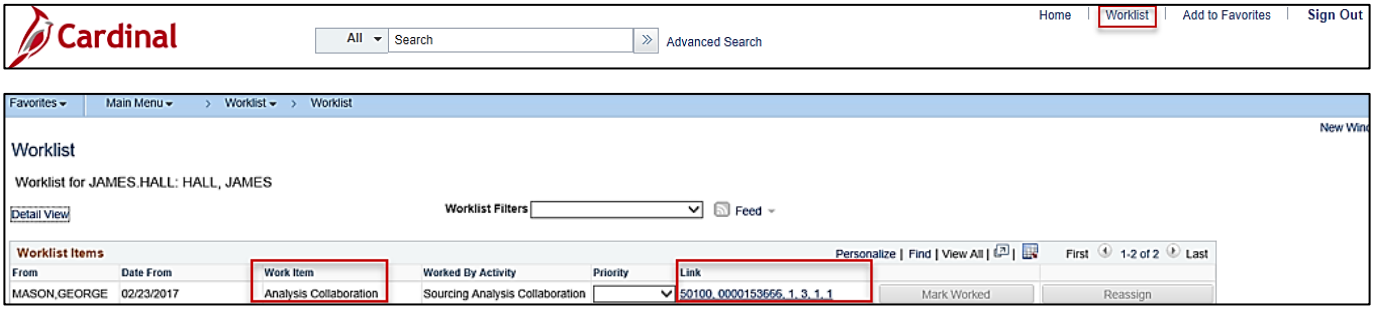
Review Event Collaboration (SS Buyer)

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

- Click the **Review the completed collaboration** hyperlink in the email notification you received,

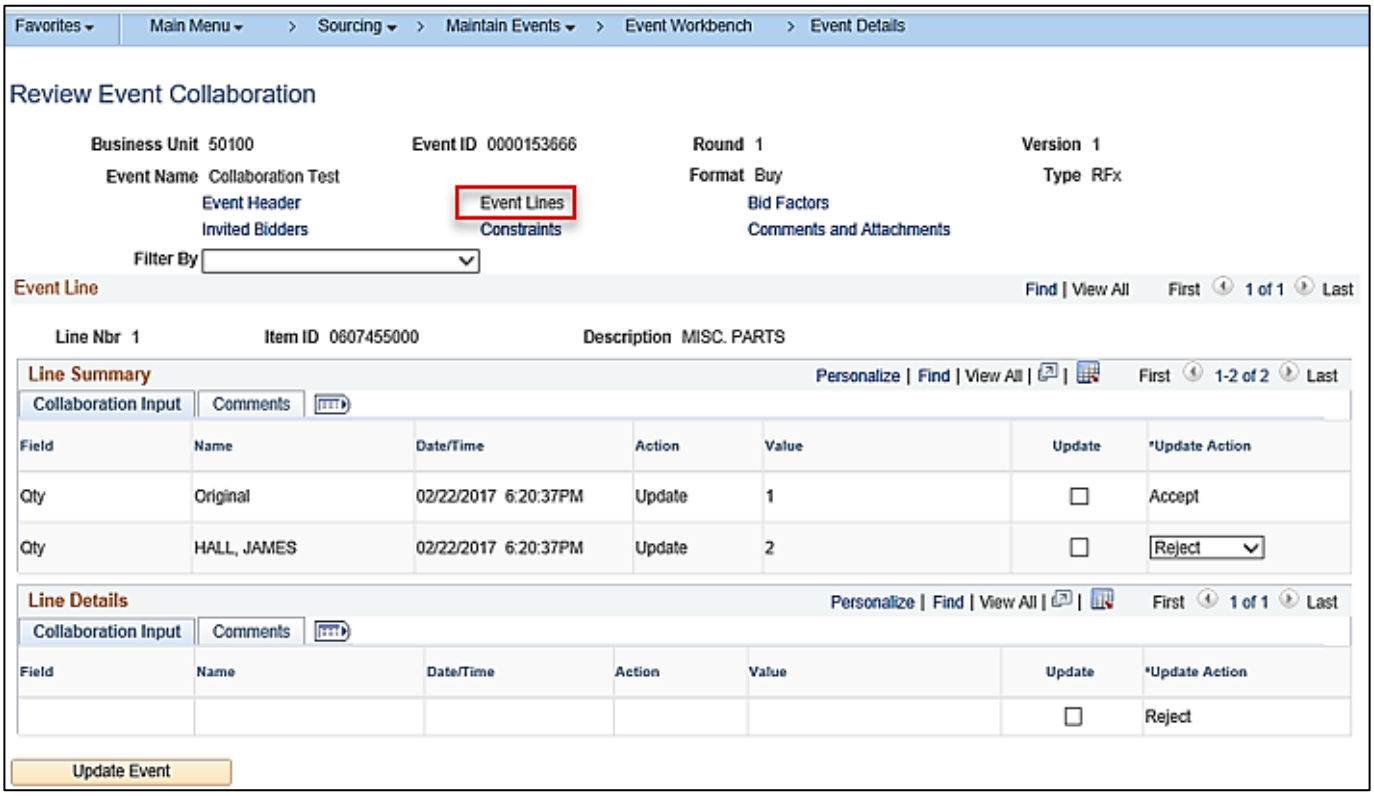
  or

- Click the event hyperlink (i.e., **Link**) from your **Worklist**

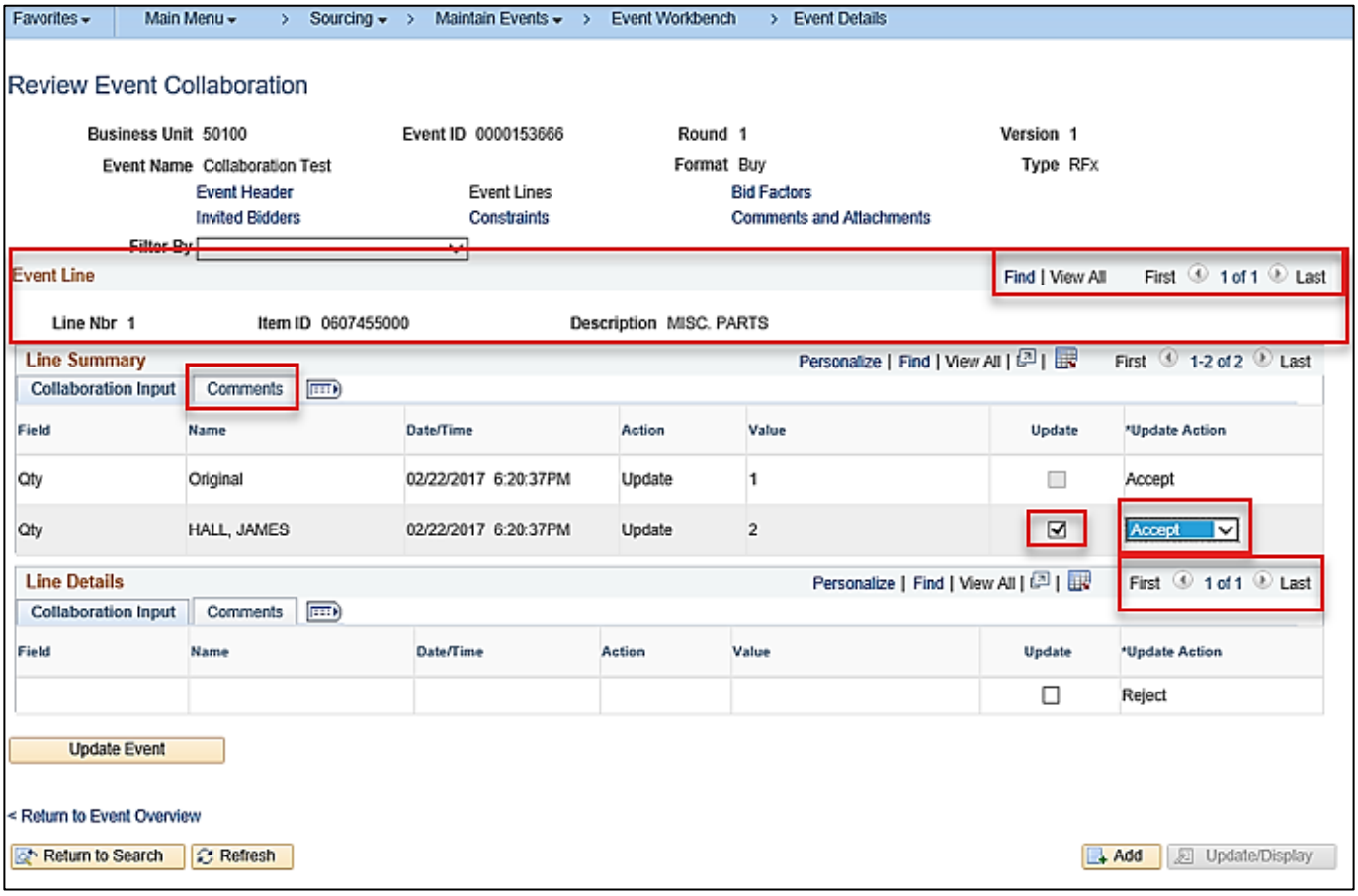


1. To access the event using your **Worklist**, from any Cardinal page, click the **Worklist** hyperlink in the top right hand corner of the page. Your **Worklist** displays.

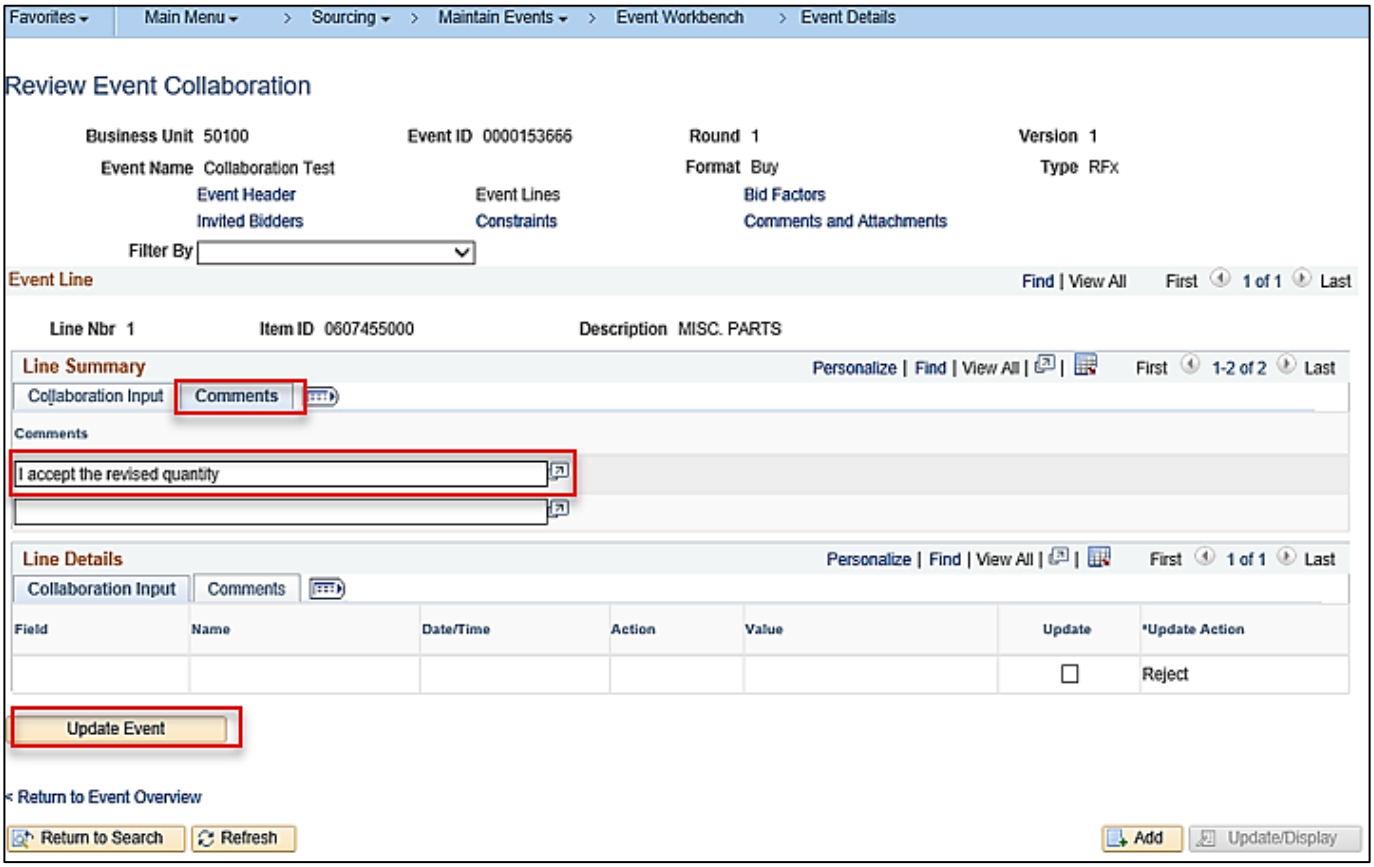
2. Under the **Work Item** column, the event will be listed as **Review Collaboration**. Click the **Link** column hyperlink on the row with the event that has the collaboration you wish to review. The **Review Event Collaboration** page displays for the selected event.



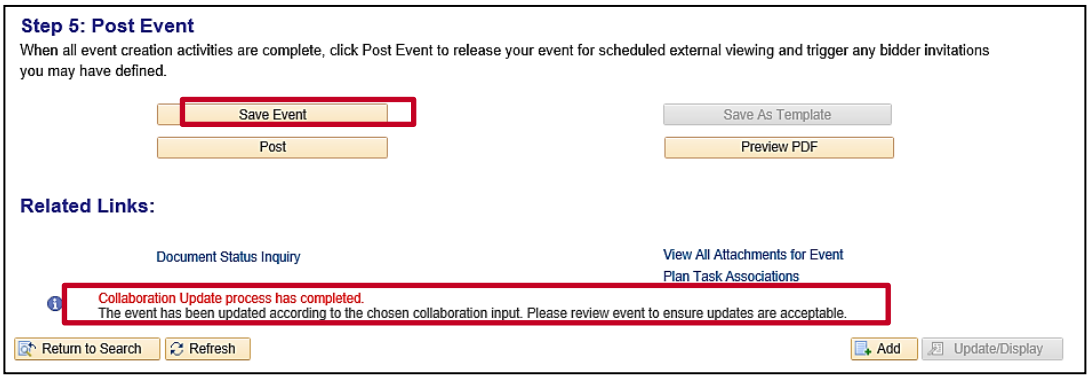
3. Click the **Event Lines** hyperlink to view the edits and/or comments entered by each collaborator.



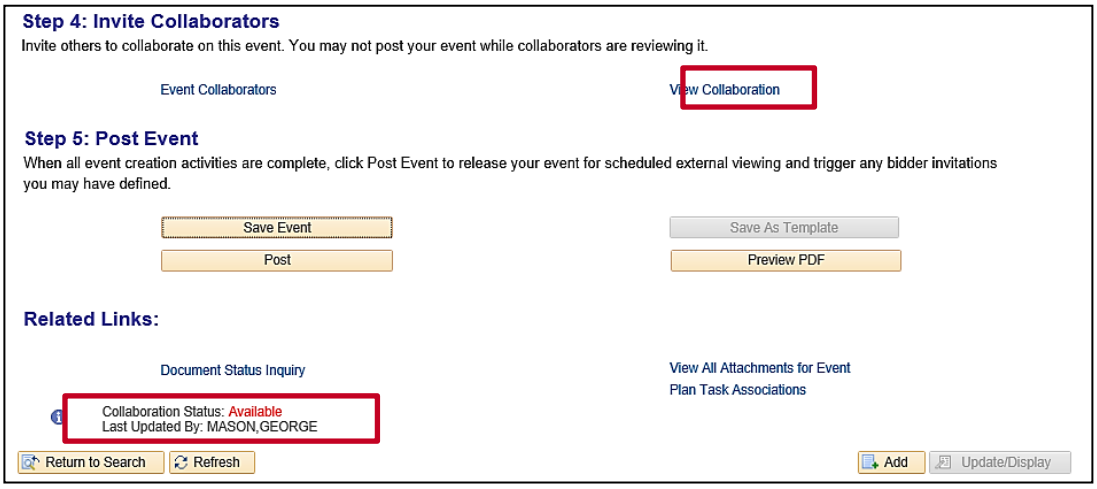
4. Review and accept or reject Collaborator edits for each **Event Line**. Use the **Show next row** and **Show previous row** icons (i.e., left and right arrows) to scroll through the lines.
5. To accept or reject a change, check the **Update** box and change the **Update Action** field to **Accept**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



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.

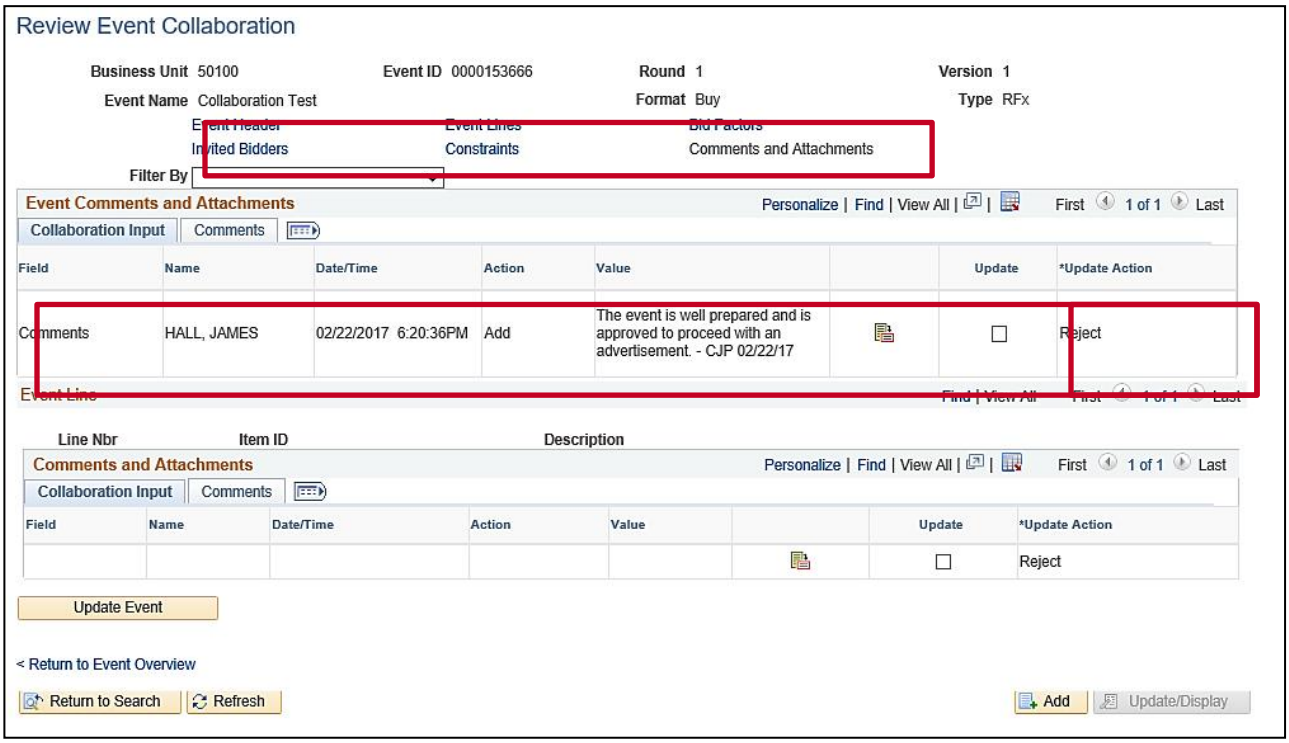


10. The event is saved and the status changes to **Collaboration Update process has completed**.
11. Click the **Save Event** button.



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.



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

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

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

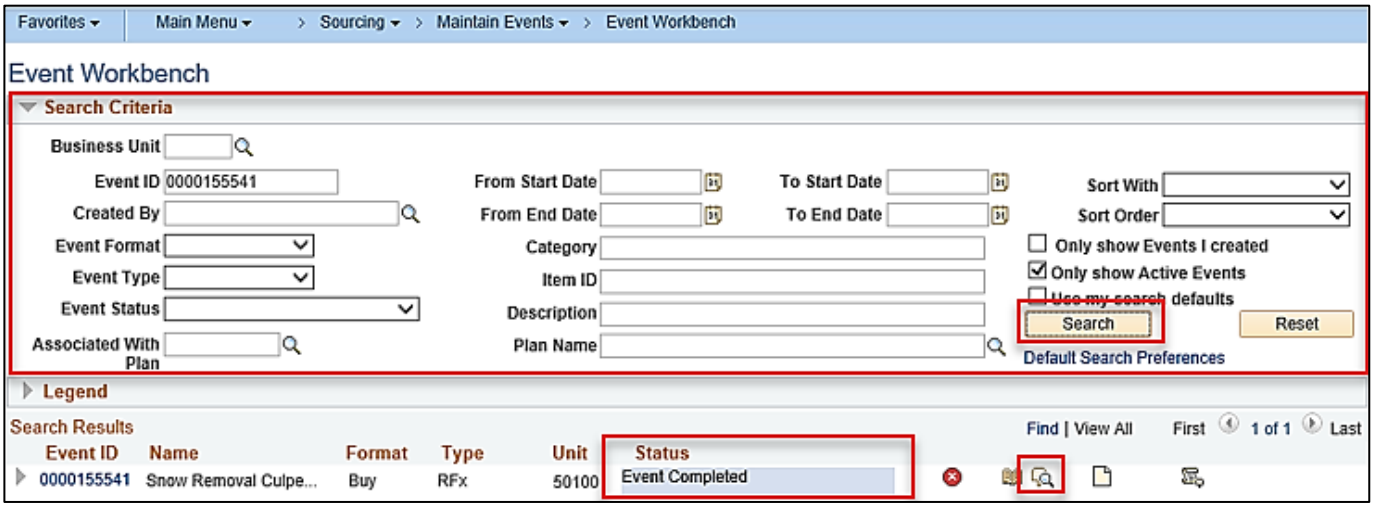
Bid Analysis Collaboration

Invite Collaborators for Bid Analysis (SS Buyer)

Once an even'ts End Date has passed and all the bids have been uploaded from eVA, the **Analyze Event** pages become available. 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.

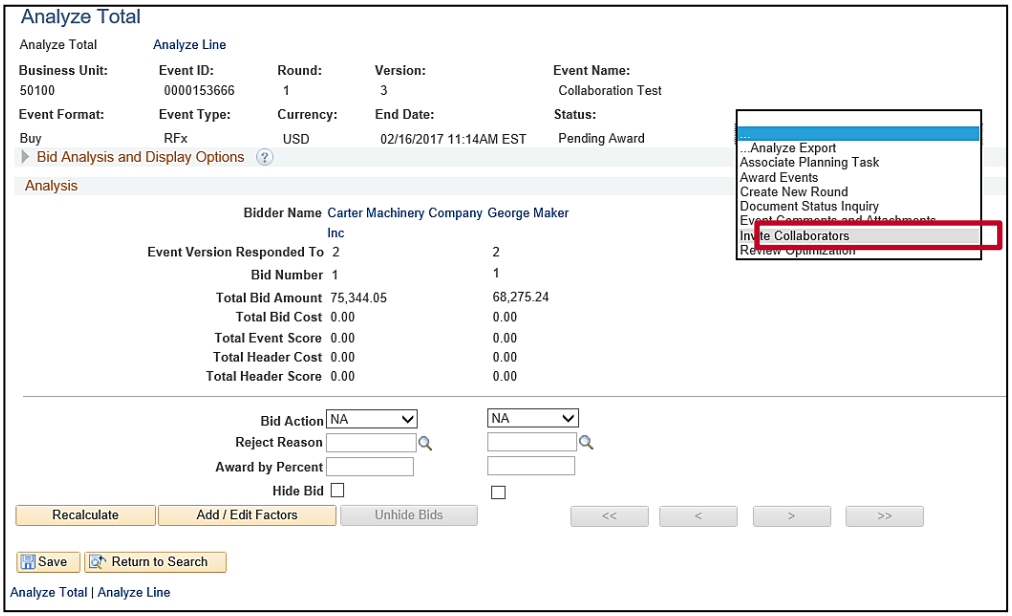
1. As the SS Buyer you can invite Collaborators to take part in the bid analysis. Navigate to the **Event Workbench** page using the following path:

   Main Menu > Sourcing > Maintain Events > Event Workbench



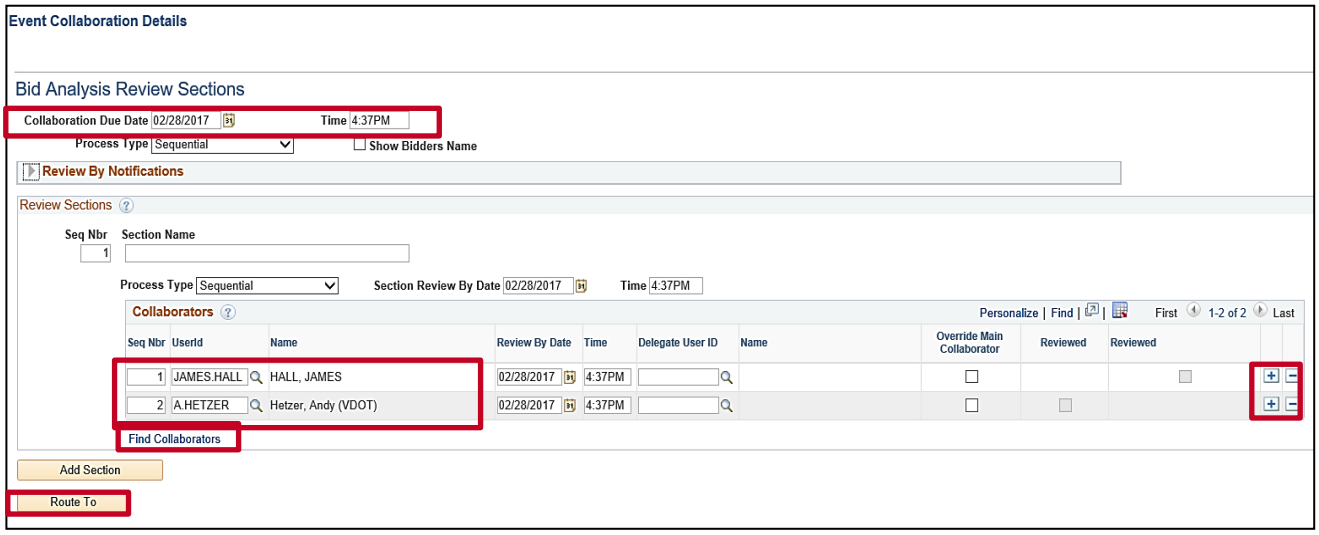
2. Search for the event using any combination of search criteria. Click the **Search** button.

3. Find the event in the search results and click 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.

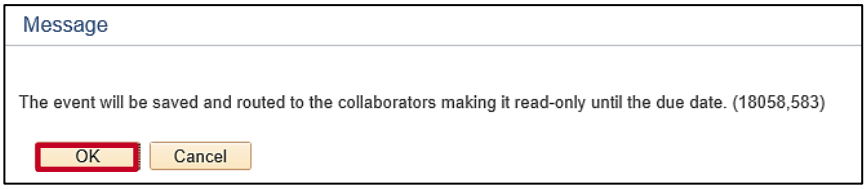


4. In the Go To drop-down menu, click Invite Collaborators. The Event Collaboration Details page displays.

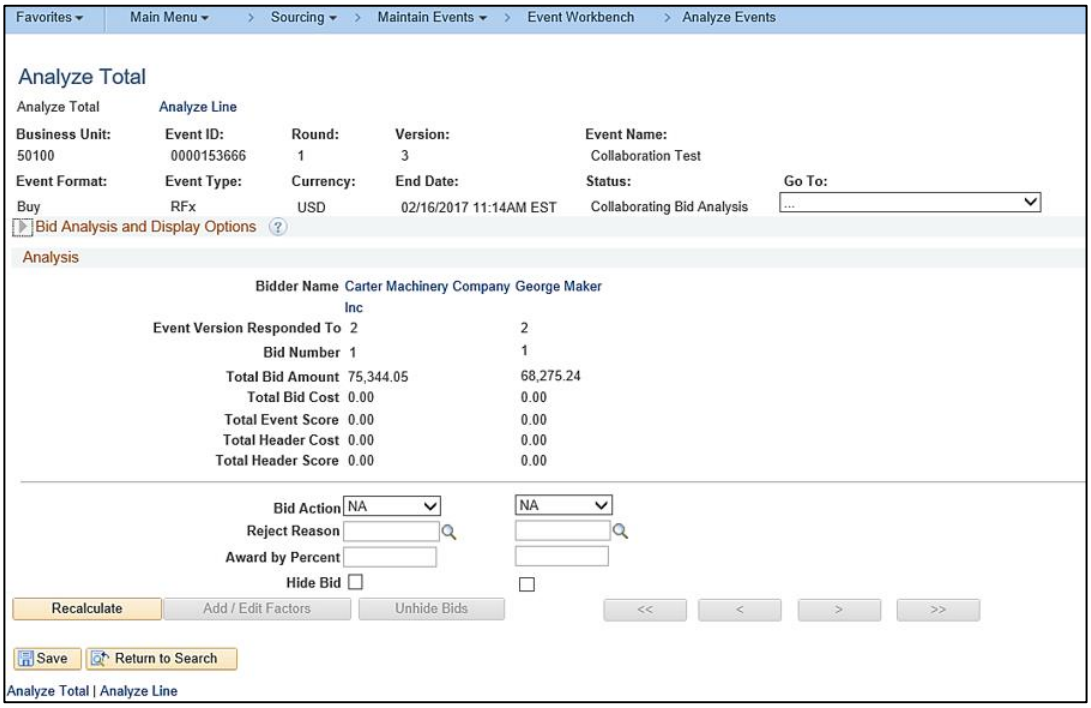
Note: Collaborators may have previously reviewed and scored bid responses outside of Cardinal. Each Collaborator enters their scores into Cardinal for calculation.



5. In the **Collaboration Due Date** field, enter a deadline date and time for all collaboration to end.
6. Clear all existing names in the **Collaborators – UserId** field.
7. In the **Collaborator UserId** 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 UserId** icon, if needed, to find a user. If you have previously set up a **Collaborator Group**, you may access the group by clicking the **Find Collaborators** hyperlink.
8. 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.
9. The routing sequence number (**Seq Nbr**) 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.
10. Once all the collaborators have been entered, click the **Route To** button. (This step is different from when you invited collaborators previously.) A routing confirmation message appears.



11. 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.



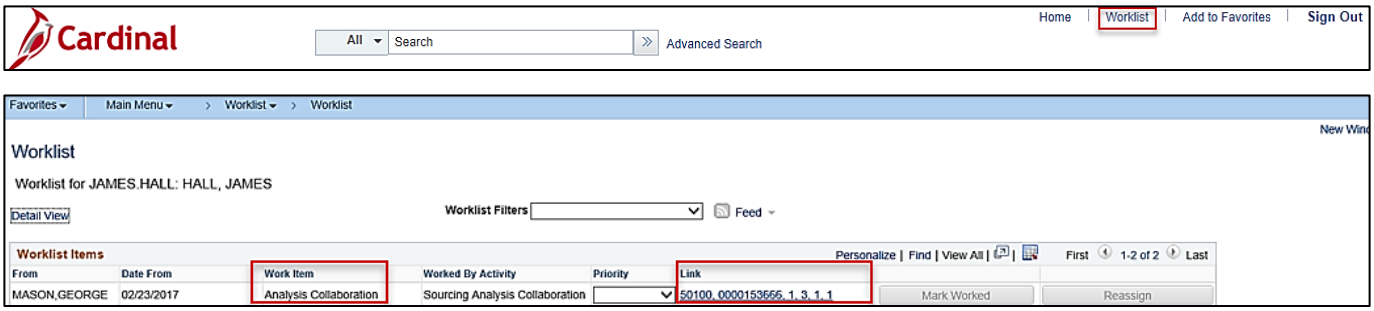
12. The event is read only for non-collaborators until the due date, and has been routed for collaboration. An email notification is sent to each Collaborator and an item is added to each Collaborator's worklist.

13. Collaborators may score the event at any time, prior to the due date.

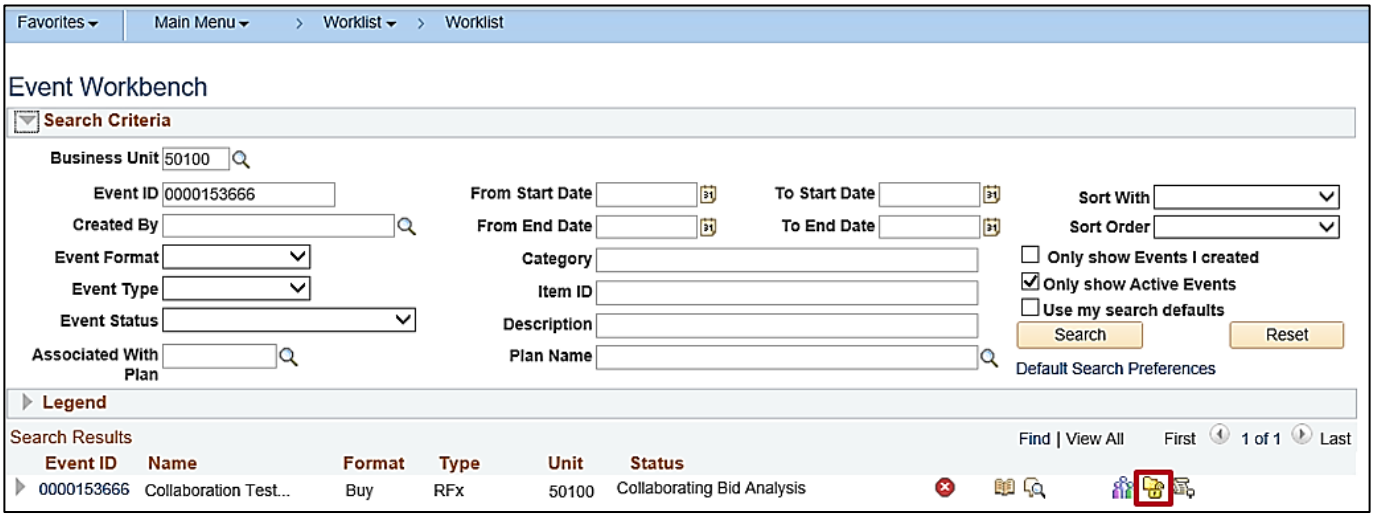
Collaborate on Bid Analysis

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:

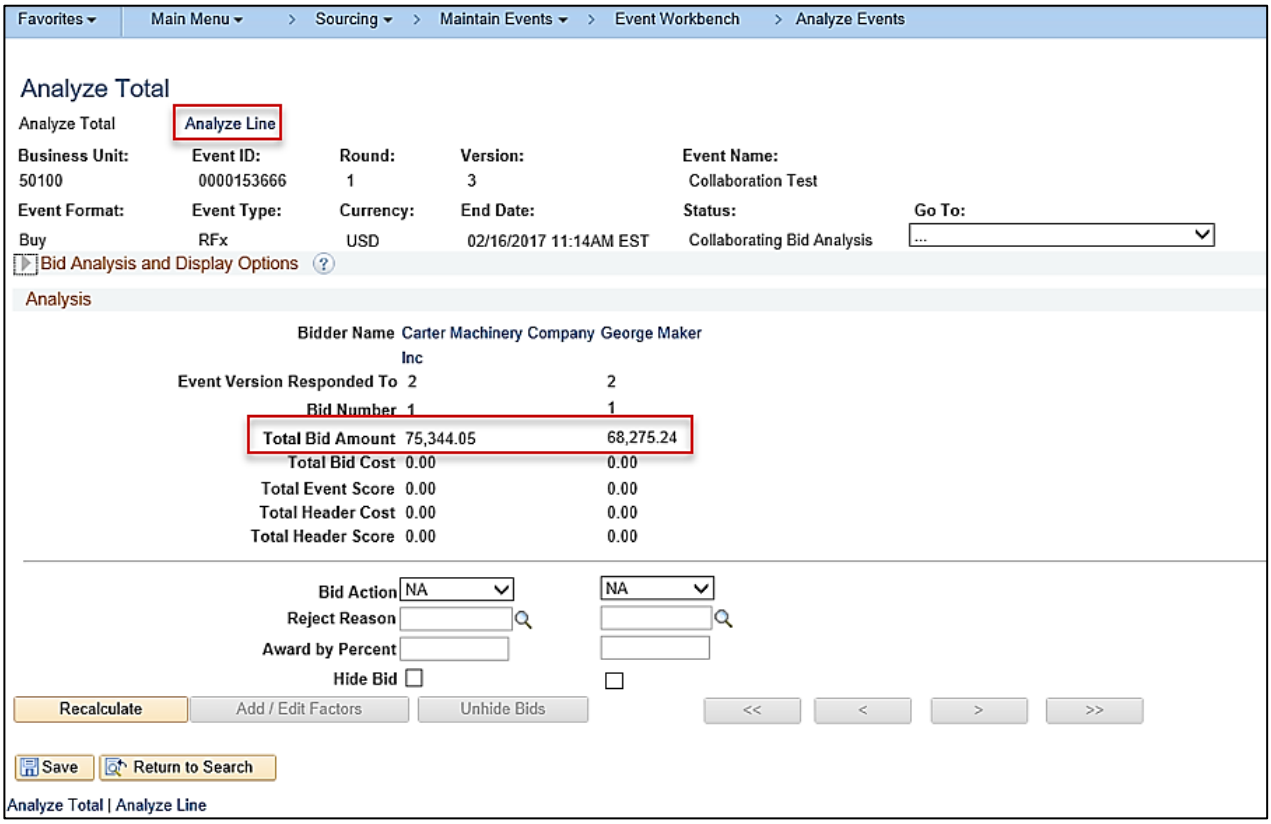
- Click the **Collaborate on this event** hyperlink in the email notification you received, or
- Click the event hyperlink (i.e., **Link**) from your **Worklist**



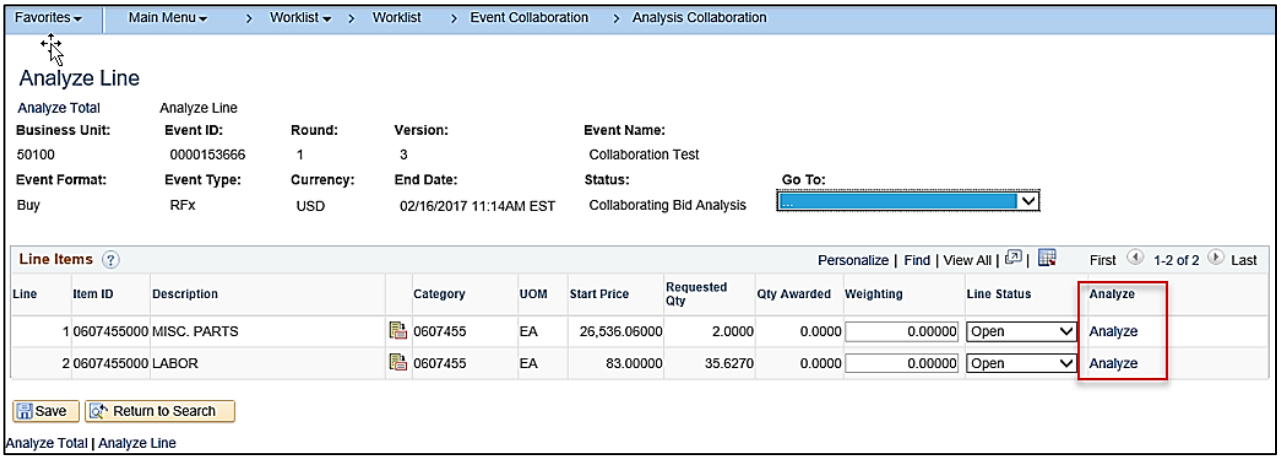
1. To access the event using your **Worklist**, from any Cardinal page, click the **Worklist** hyperlink in the top right hand corner of the page. Your **Worklist** displays.
2. Under the **Work Item** column, the event will be listed as **Analysis Collaboration**. Click the **Link** column hyperlink on the row with the event that has the collaboration you wish to review. The **Event Workbench** displays.



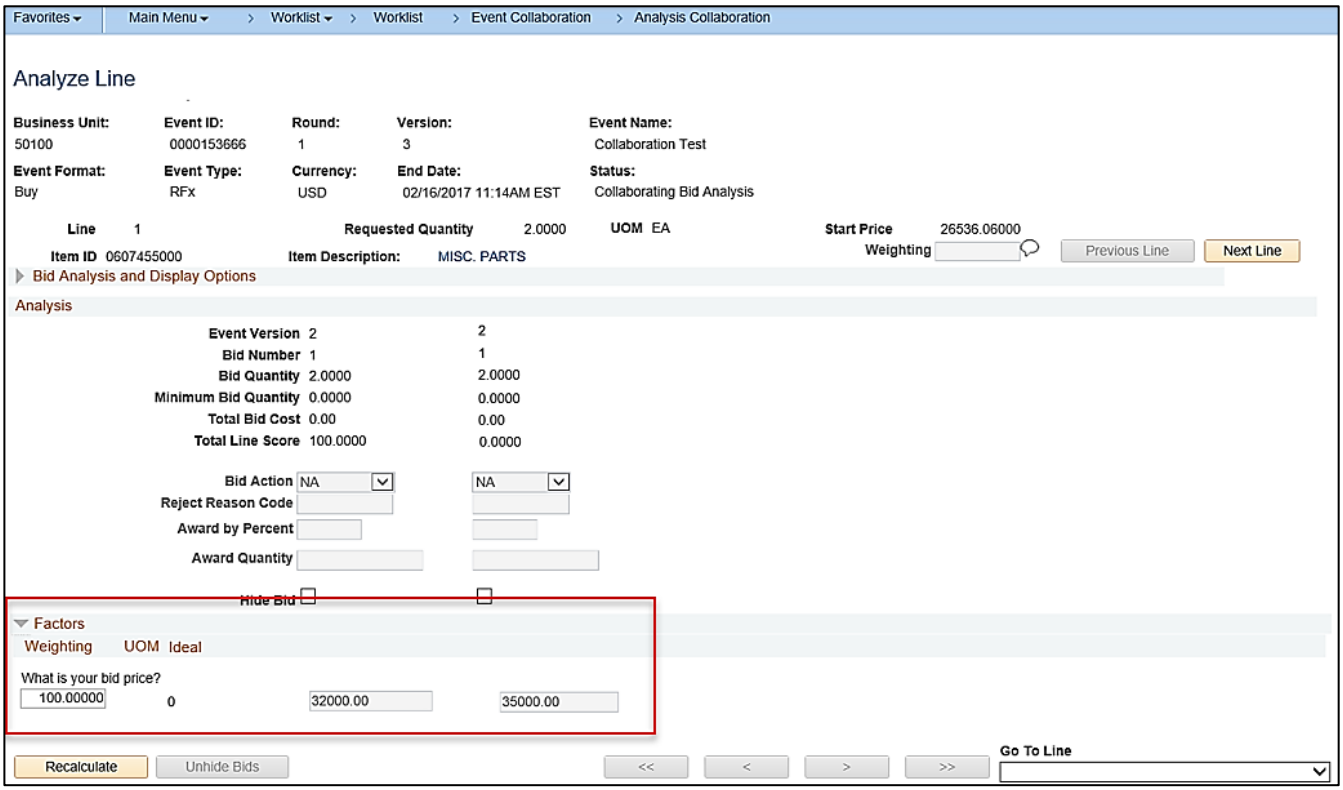
3. Click the Collaboration Available (Available for checkout) icon. The Analyze Total page displays.



4. Review the **Total Bid Amount** and bid factors. If applicable, text bid factors would be scored here.
5. Click the **Analyze Line** hyperlink in the top left part of the page. The **Analyze Line** page displays.

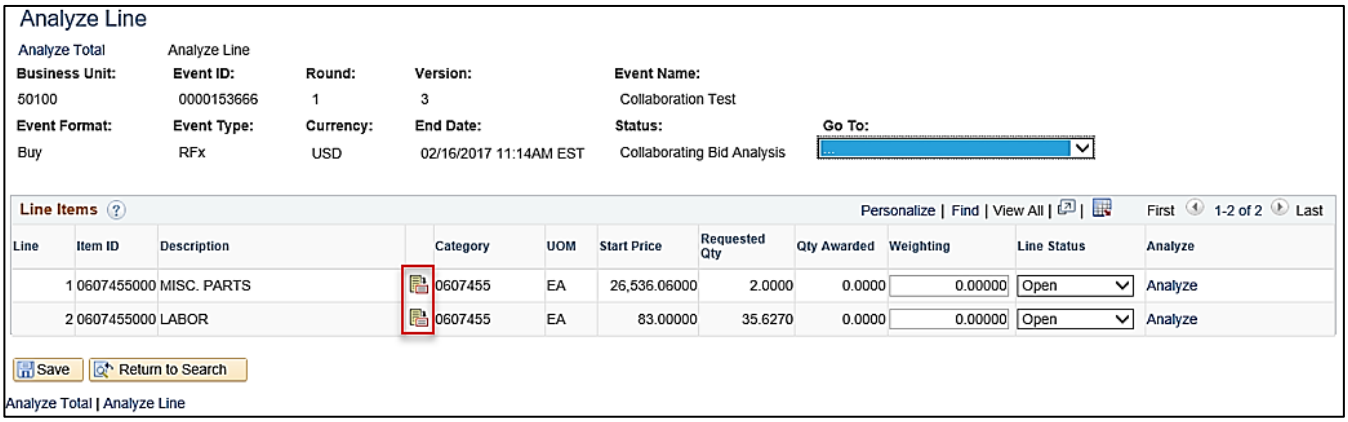


6. To analyze responses by line, click the **Analyze** bids hyperlink on each line in the **Line Items** section. A different **Analyze Line** page displays.

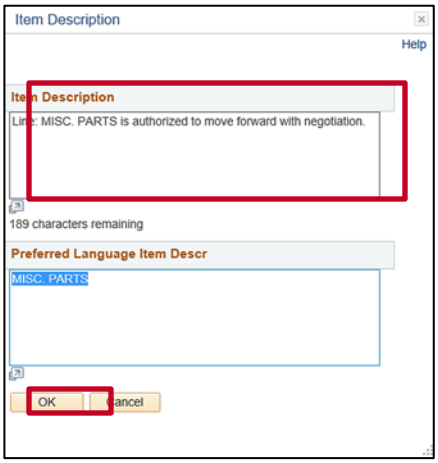


7. Review the line bid price information.

8. Click the **OK** button. The original **Analyze Line** page displays.

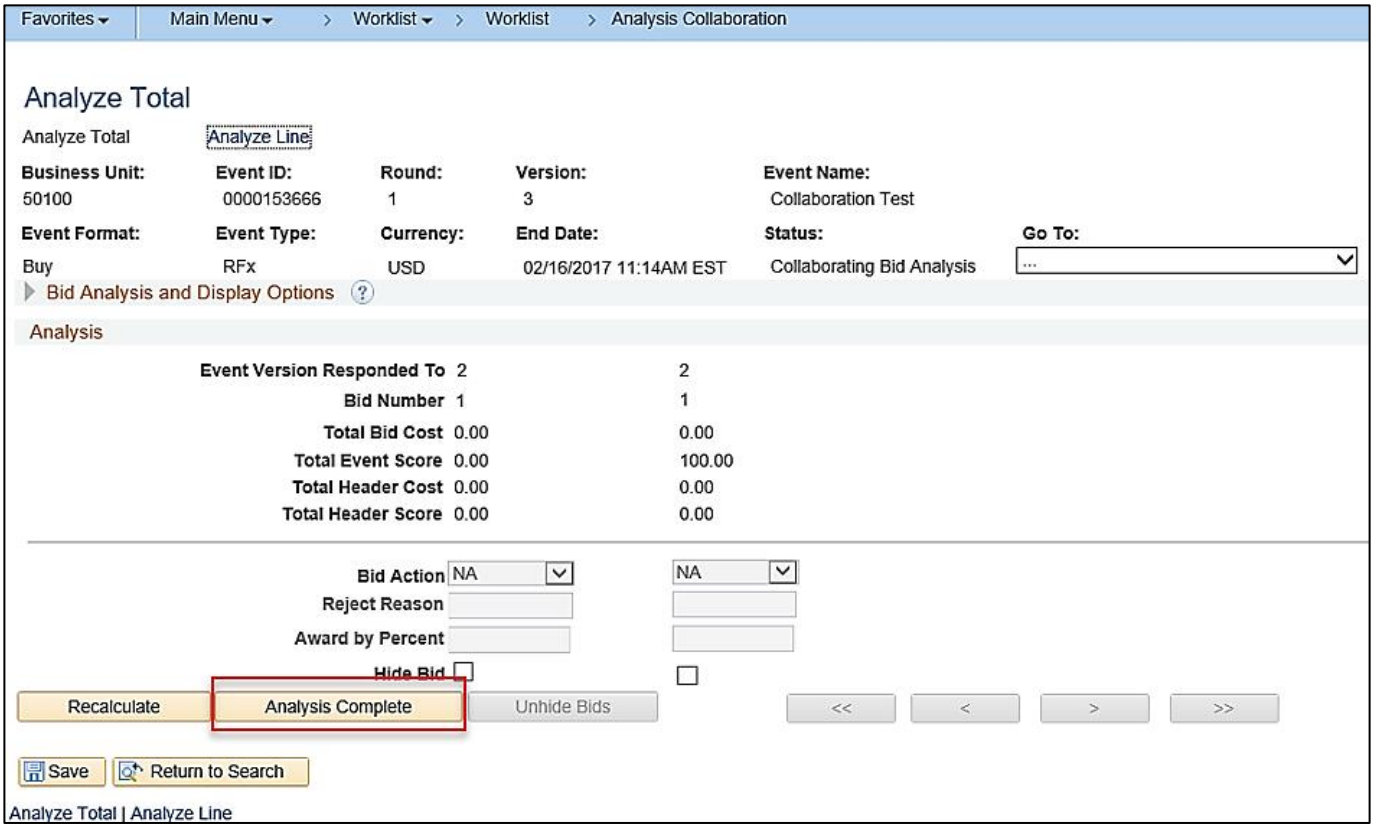


9. To enter comments on a bid response item, click the **Item Description** icon. Comments entered on the **Item Description** are carried over to events that are copied from this event. Therefore you should <u>not</u> use the copy functionality on events with comments added using **Item Description**.

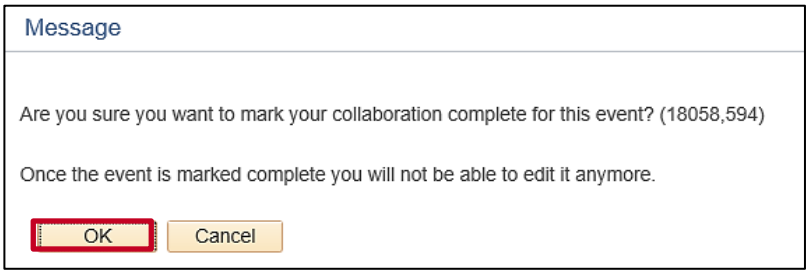


10. Enter a comment in the **Item Description** box.

11. Click the **OK** button. The **Analyze Total** page displays.



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



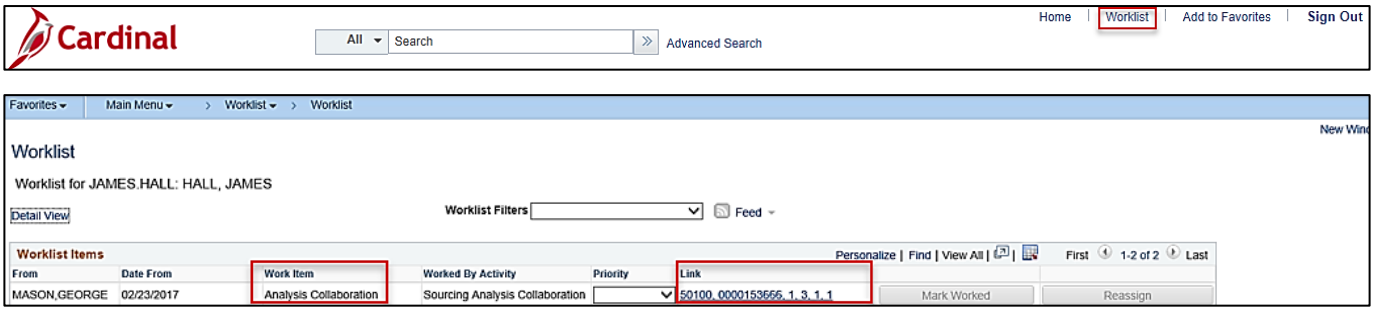
13. Click the **OK** button to confirm that you do not wish to make further edits and to complete collaboration.

14. 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)

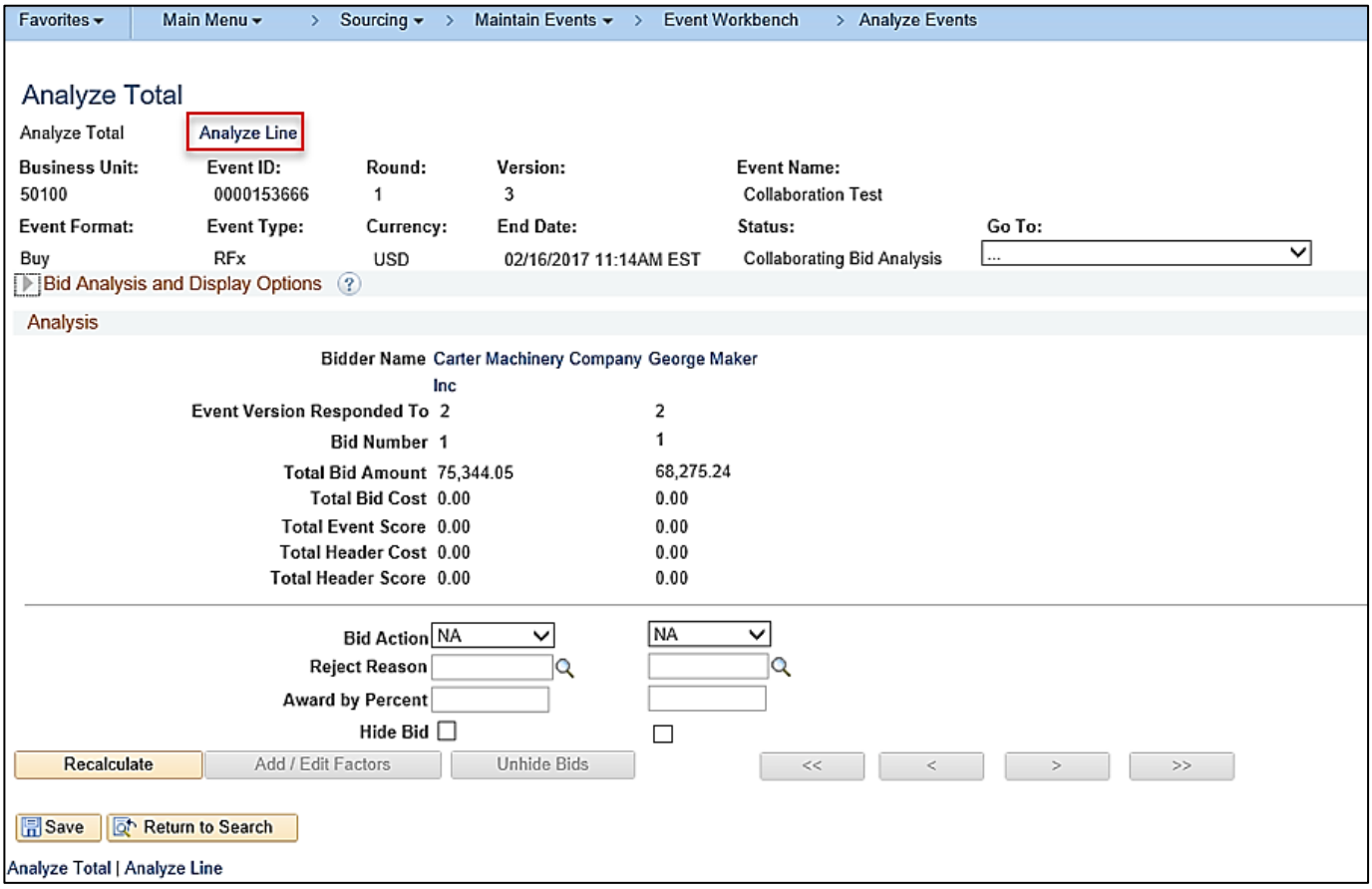
To review collaborator input on the bid responses, the SS Buyer has multiple options:

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

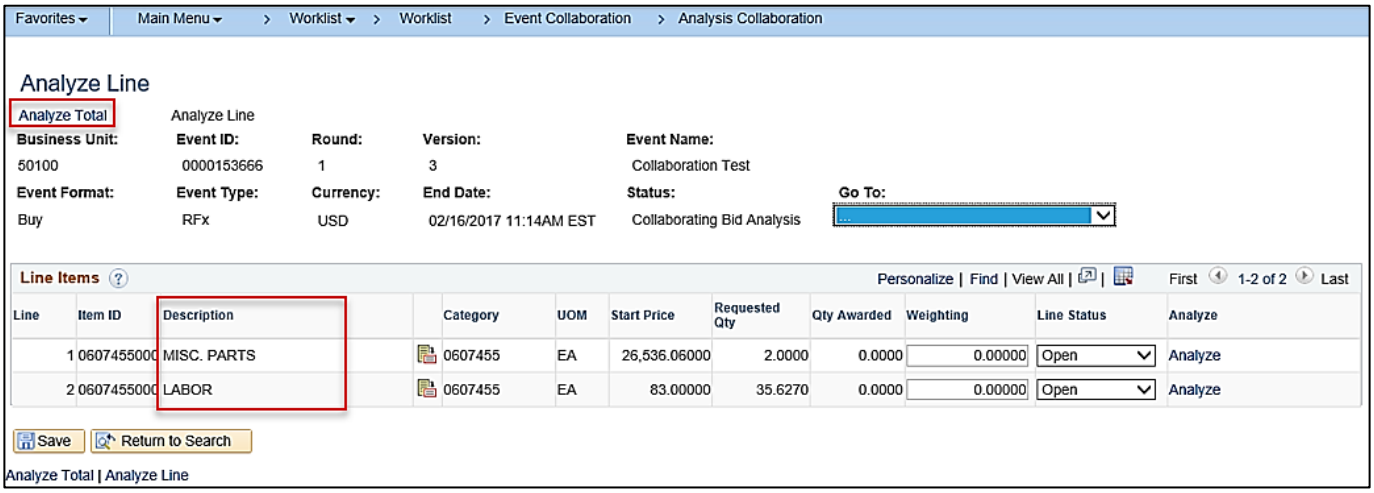


1. Using your **Worklist**, from any Cardinal page, click the **Worklist** hyperlink in the top right hand corner of the page. Your **Worklist** displays.

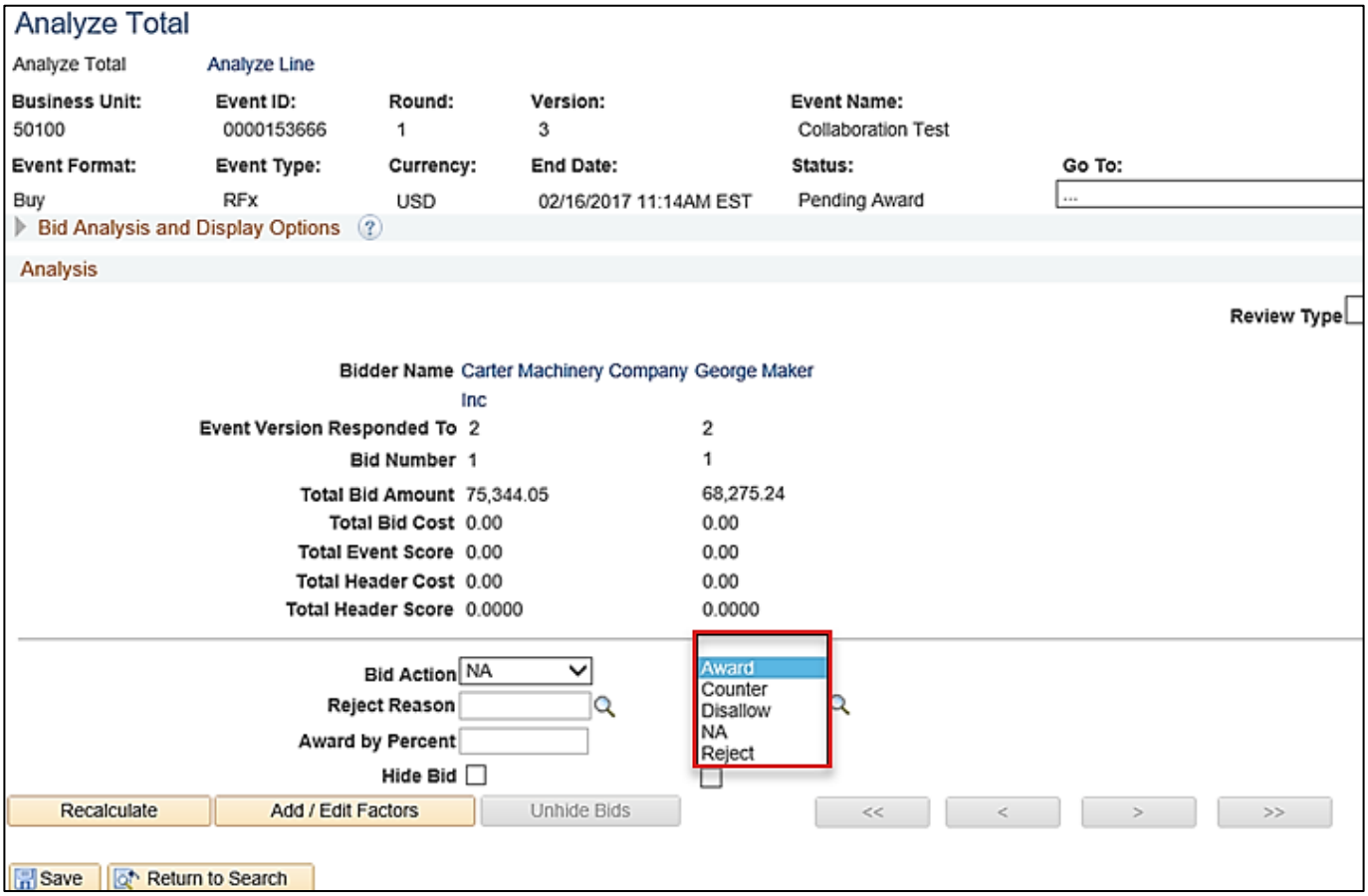
2. Under the **Work Item** column, the event will be listed as **Analysis Collaboration**. Click the **Link** column hyperlink on the row with the event that has the collaboration you wish to review. The **Analyze Total** page displays for the selected event.



3. Click the **Analyze Line** hyperlink. The **Analyze Line** page displays.



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



6. Follow normal strategic sourcing processes to make the award. For instructions on the strategic sourcing process and awarding events, refer to the job aid entitled **PR345: Strategic Sourcing Bid Factors, Weights, Score and Awards** located on the Cardinal website in **Job Aids** under **Training**.