

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 Learning.

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Event Collaboration

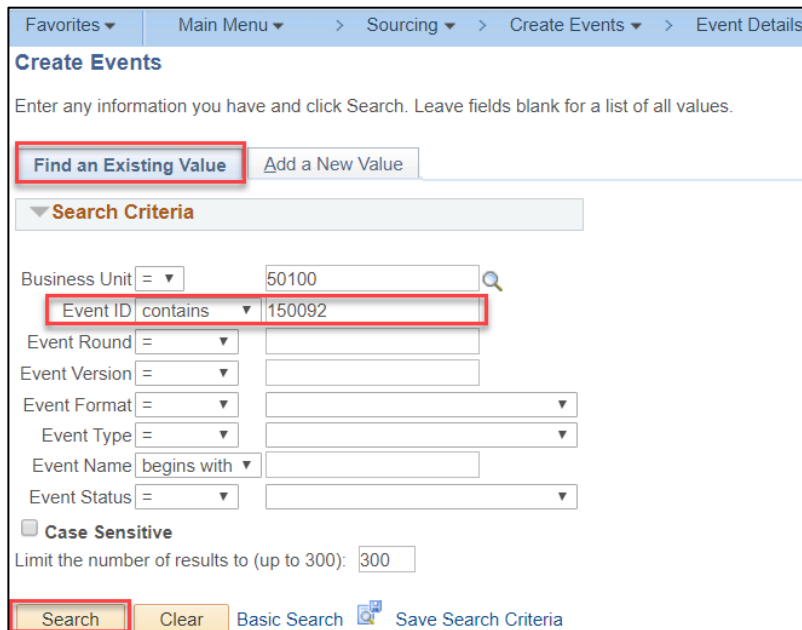
Invite Event Collaborators (SS Buyer)

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

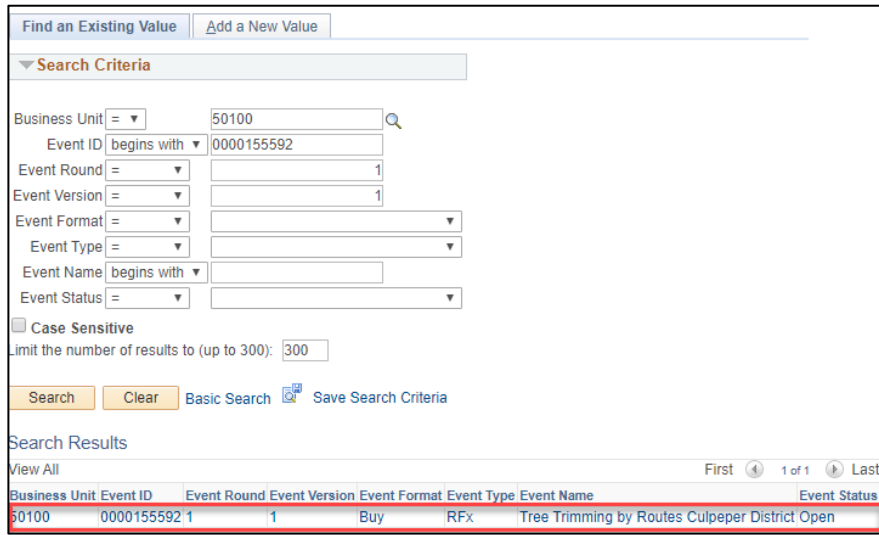


The screenshot shows the 'Create Events' search interface. The breadcrumb path is 'Main Menu > Sourcing > Create Events > Event Details'. The 'Find an Existing Value' tab is selected. Below the tabs, there is a search criteria section with the following fields:

- Business Unit: 50100
- Event ID: contains 150092
- Event Round: [empty]
- Event Version: [empty]
- Event Format: [empty]
- Event Type: [empty]
- Event Name: begins with [empty]
- Event Status: [empty]

There is a 'Case Sensitive' checkbox and a 'Limit the number of results to (up to 300): 300' field. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

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.



Find an Existing Value | Add a New Value

Search Criteria

Business Unit = 50100

Event ID begins with 0000155592

Event Round = 1

Event Version = 1

Event Format = Buy

Event Type = RFX

Event Name begins with Tree Trimming by Routes Culpeper District

Event Status = Open

Case Sensitive

Limit the number of results to (up to 300): 300

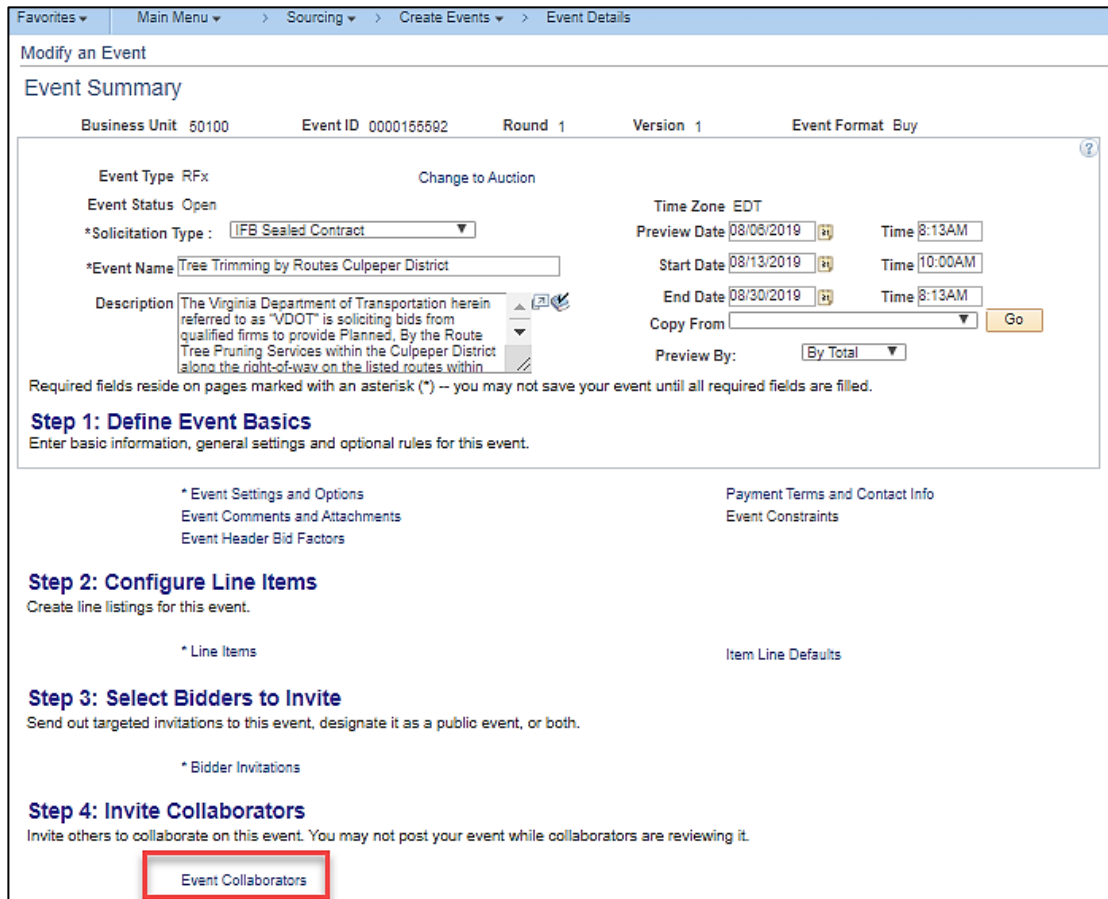
Search Clear Basic Search Save Search Criteria

Search Results

View All First 1 of 1 Last

Business Unit	Event ID	Event Round	Event Version	Event Format	Event Type	Event Name	Event Status
50100	0000155592	1	1	Buy	RFX	Tree Trimming by Routes Culpeper District	Open

6. Select an **Event** with a status of **Open**.
7. The Create an Event – Event Summary page displays.



Favorites Main Menu Sourcing Create Events Event Details

Modify an Event

Event Summary

Business Unit 50100 Event ID 0000155592 Round 1 Version 1 Event Format Buy

Event Type RFX Change to Auction

Event Status Open

*Solicitation Type: IFB Sealed Contract

*Event Name Tree Trimming by Routes Culpeper District

Description The Virginia Department of Transportation herein referred to as "VDOT" is soliciting bids from qualified firms to provide Planned, By the Route Tree Pruning Services within the Culpeper District along the right-of-way on the listed routes within

Time Zone EDT

Preview Date 08/05/2019 Time 8:13AM

Start Date 08/13/2019 Time 10:00AM

End Date 08/30/2019 Time 8:13AM

Copy From [Dropdown] Go

Preview By: By Total

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

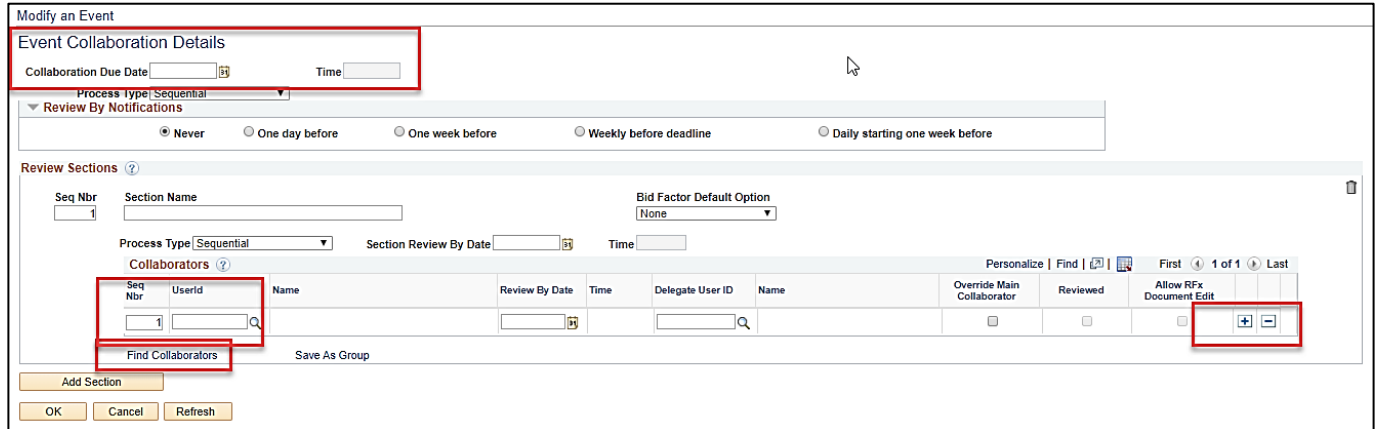
Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

- * 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](#)

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



Modify an Event

Event Collaboration Details

Collaboration Due Date: [] Time: []

Process Type: Sequential

Review By Notifications: Never One day before One week before Weekly before deadline Daily starting one week before

Review Sections

Seq Nbr: 1 Section Name: [] Bid Factor Default Option: None

Process Type: Sequential Section Review By Date: [] Time: []

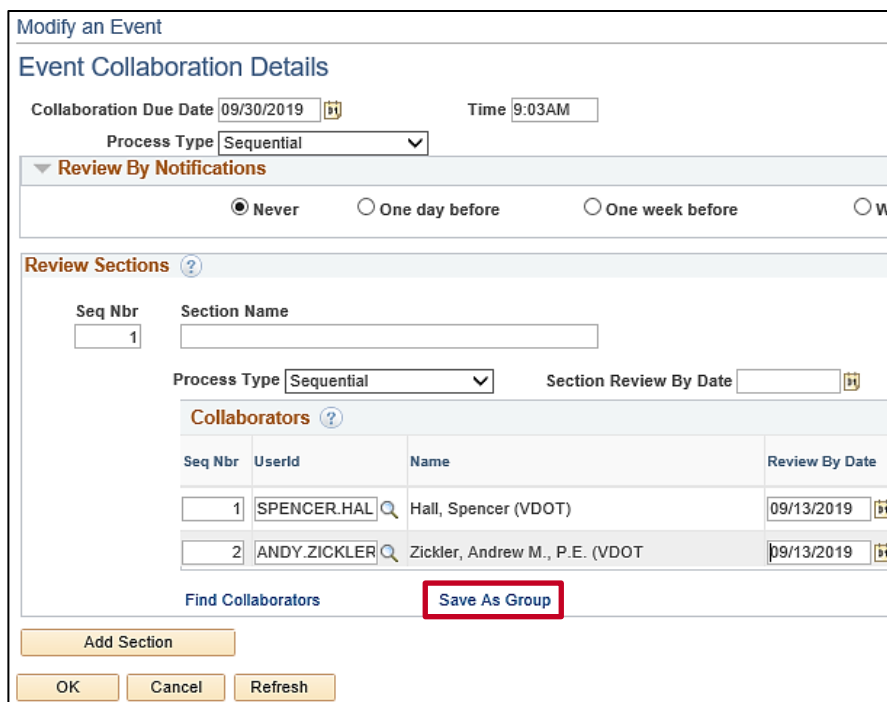
Collaborators

Seq Nbr	Userid	Name	Review By Date	Time	Delegate User ID	Name	Override Main Collaborator	Reviewed	Allow RFx Document Edit
1	[]	[]	[]	[]	[]	[]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Find Collaborators Save As Group

Add Section OK Cancel Refresh

9. 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.
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.



Modify an Event

Event Collaboration Details

Collaboration Due Date: 09/30/2019 Time: 9:03AM

Process Type: Sequential

Review By Notifications: Never One day before One week before We

Review Sections

Seq Nbr: 1 Section Name: []

Process Type: Sequential Section Review By Date: []

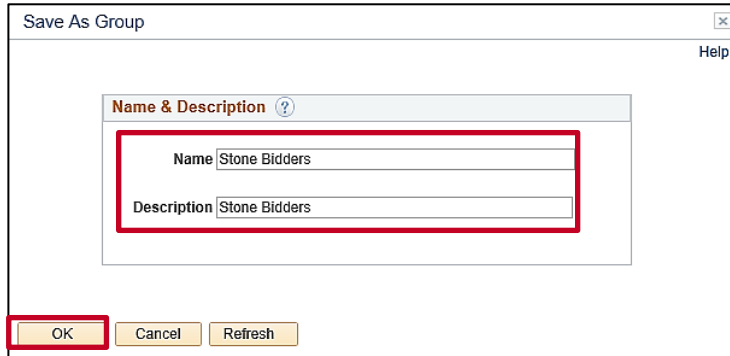
Collaborators

Seq Nbr	Userid	Name	Review By Date
1	SPENCER.HAL	Hall, Spencer (VDOT)	09/13/2019
2	ANDY.ZICKLER	Zickler, Andrew M., P.E. (VDOT)	09/13/2019

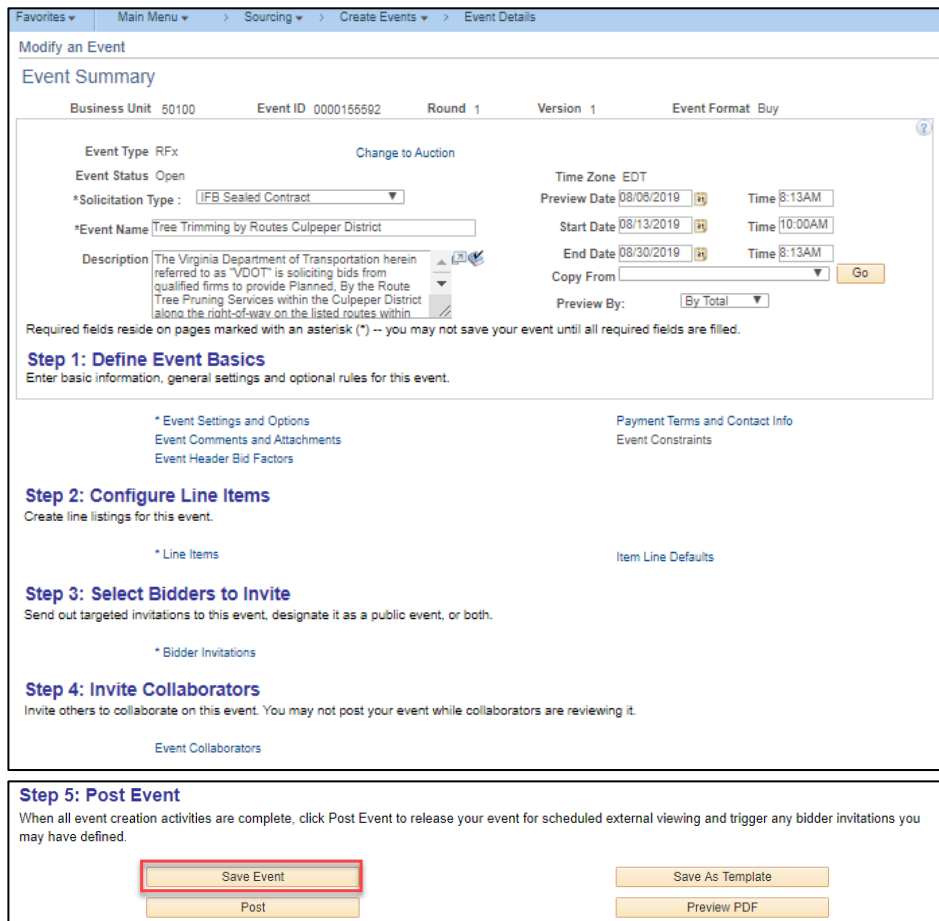
Find Collaborators **Save As Group**

Add Section OK Cancel Refresh

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.



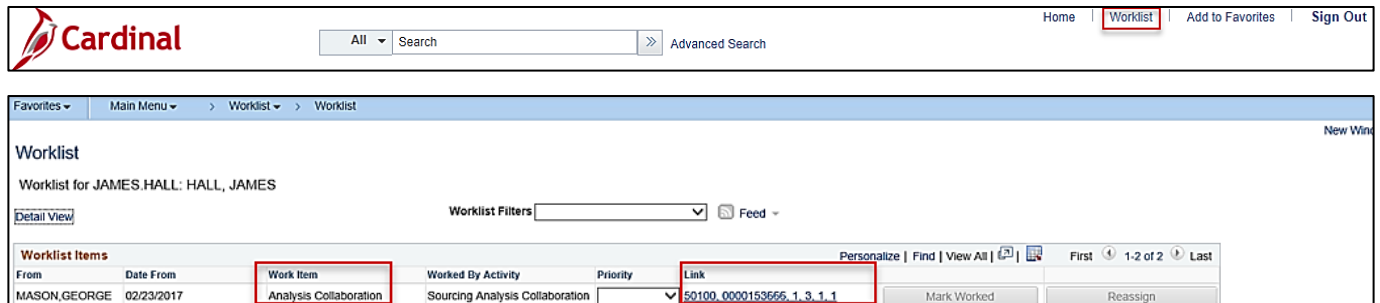
17. Click the **Save Event** button. The page looks the same but the title of the page has updated to **Modify an Event – Event Summary** page. The **Event Status** is **Open**.
18. Click the **Route** button to send the event to the first collaborator. An email notification is sent to each Collaborator 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:

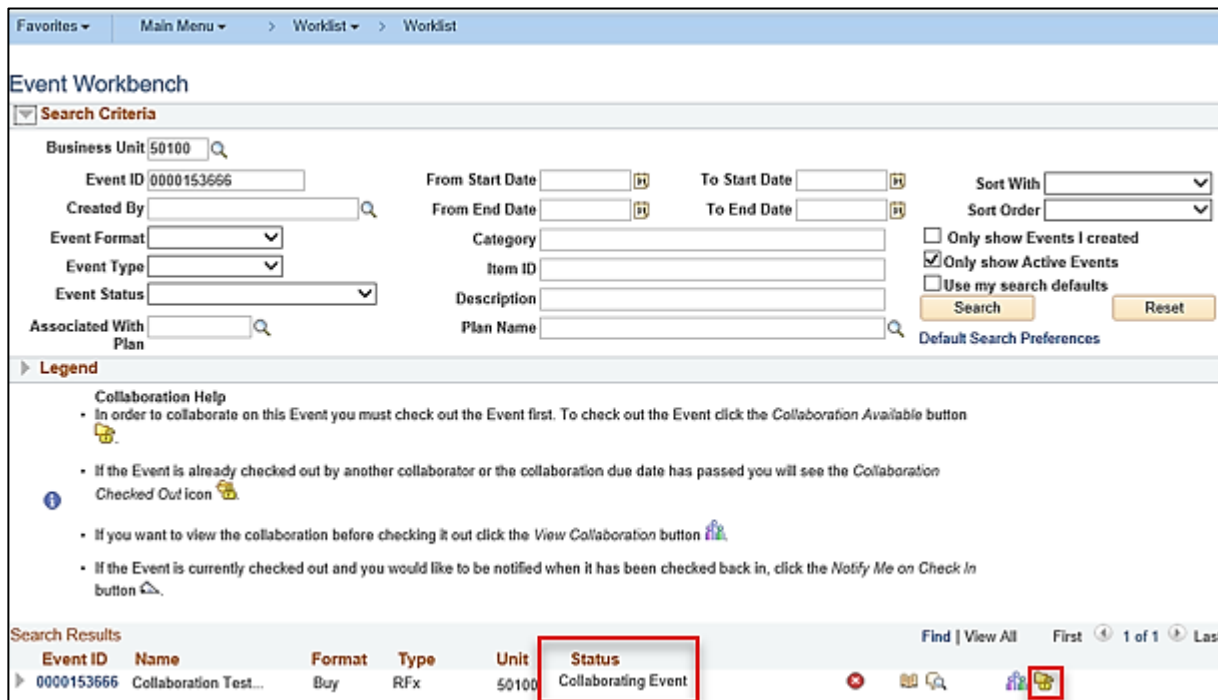
- Click the **Collaborate on this event** hyperlink in the email notification you received, or
- Click the event hyperlink (i.e., **Link**) from your **Worklist**



From	Date From	Work Item	Worked By Activity	Priority	Link	
MASON,GEORGE	02/23/2017	Analysis Collaboration	Sourcing Analysis Collaboration		50100_0000153666.1_3_1_1	Mark Worked Reassign

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.

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



The screenshot shows the 'Event Workbench' interface. At the top, there are navigation tabs: 'Favorites', 'Main Menu', 'Worklist', and 'Worklist'. Below this is the 'Event Workbench' title and a 'Search Criteria' section. The search criteria include fields for Business Unit (50100), Event ID (0000153666), Created By, Event Format, Event Type, Event Status, Associated With Plan, From Start Date, To Start Date, From End Date, To End Date, Category, Item ID, Description, and Plan Name. There are also checkboxes for 'Only show Events I created', 'Only show Active Events', and 'Use my search defaults', along with 'Search' and 'Reset' buttons. Below the search criteria is a 'Legend' section with 'Collaboration Help' and several bullet points explaining collaboration icons. At the bottom, there is a 'Search Results' table with columns: Event ID, Name, Format, Type, Unit, and Status. The first row shows Event ID 0000153666, Name Collaboration Test..., Format Buy, Type RFx, Unit 50100, and Status Collaborating Event. The 'Status' column is highlighted with a red box. To the right of the table are navigation buttons: 'Find | View All', 'First', '1 of 1', and 'Last'.

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

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

<p>* Event Settings and Options</p> <p>Event Comments and Attachments</p> <p>Event Header Bid Factors</p>	<p>Payment Terms and Contact Info</p> <p>Event Constraints</p>
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Step 2: Configure Line Items
Create line listings for this event.

<p>* Line Items</p>	<p>Item Line Defaults</p>
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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.

<p>Event Collaborators</p>	<p>View Collaboration</p>
--------------------------------------------	-------------------------------------------

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.

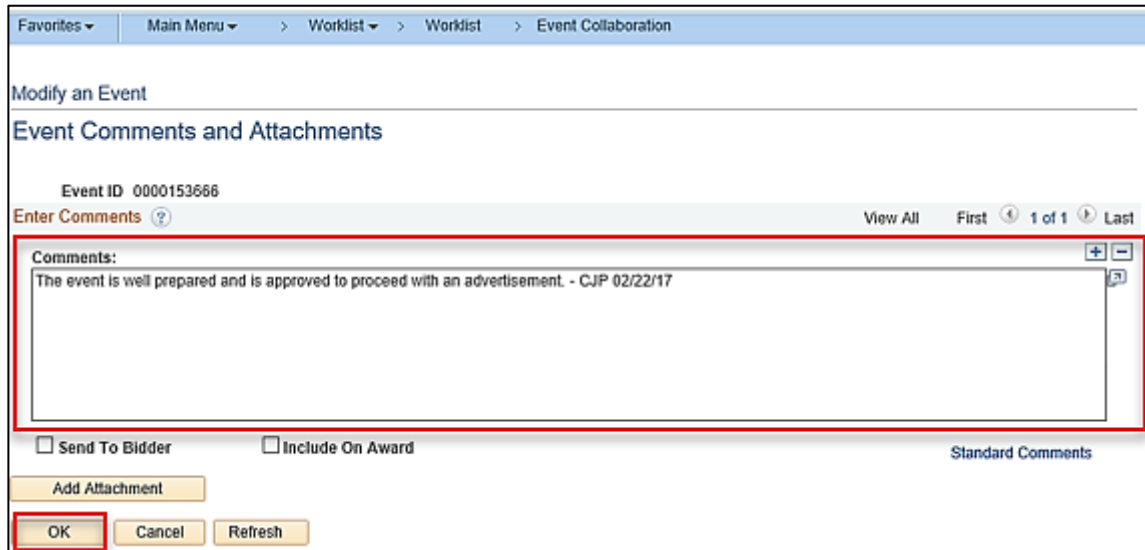
<p>Save Event</p> <p>Route</p>	<p>Save As Template</p> <p>Preview PDF</p>
----------------------------------------------------------------	----------------------------------------------------------------------------

Related Links:

<p>Document Status Inquiry</p>	<p>View All Attachments for Event</p> <p>Plan Task Associations</p>
------------------------------------------------	-----------------------------------------------------------------------------------------------------

Collaboration Status: Checked Out
 Checked Out By: HALL, JAMES
 Checked Out On: 02/22/2017 05:36 PM EDT
 Last Updated By: MASON, GEORGE

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**.



Modify an Event

Event Comments and Attachments

Event ID 0000153666

Enter Comments ? View All First 1 of 1 Last

Comments:

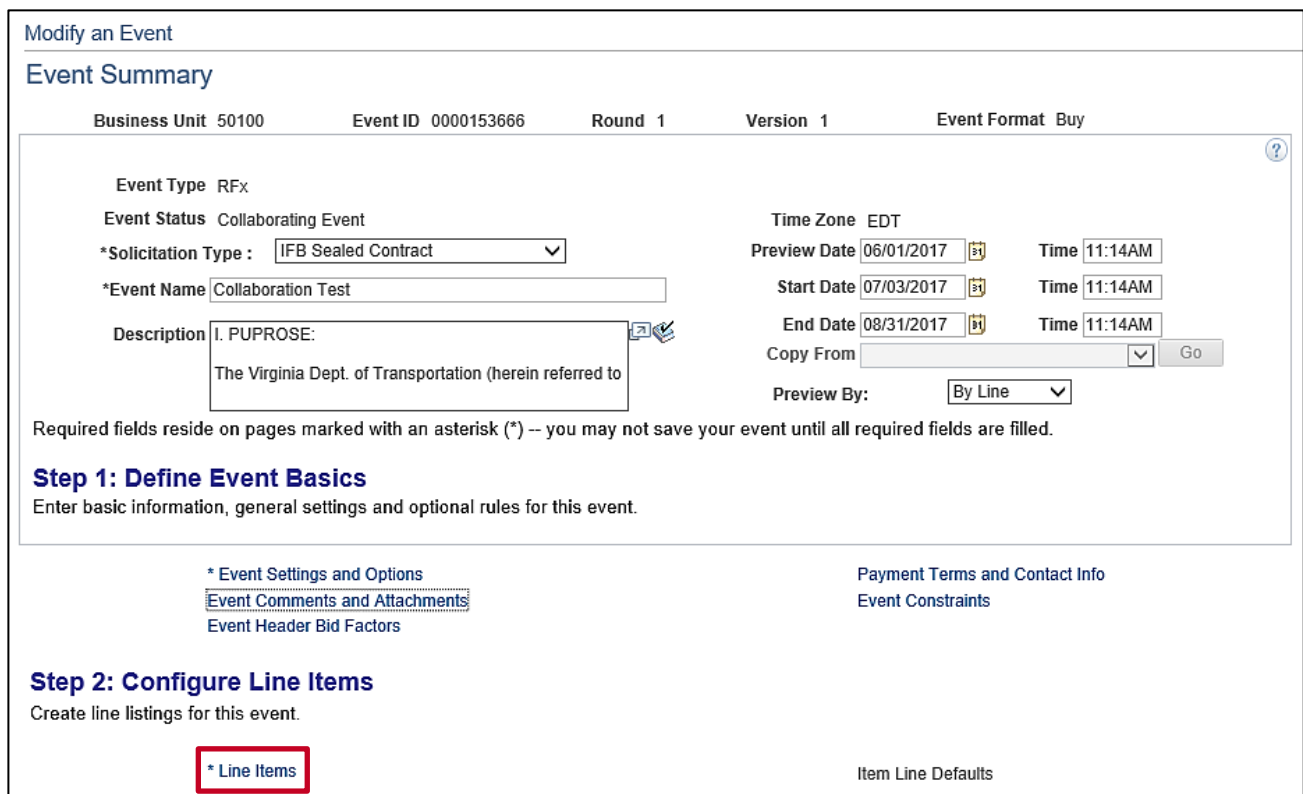
The event is well prepared and is approved to proceed with an advertisement. - CJP 02/22/17

Send To Bidder Include On Award Standard Comments

Add Attachment

OK Cancel Refresh

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



Modify an Event

Event Summary

Business Unit 50100 Event ID 0000153666 Round 1 Version 1 Event Format Buy

Event Type RFx

Event Status Collaborating Event

*Solicitation Type : IFB Sealed Contract

*Event Name Collaboration Test

Description I. PUPPOSE:
The Virginia Dept. of Transportation (herein referred to

Time Zone EDT

Preview Date 06/01/2017 Time 11:14AM

Start Date 07/03/2017 Time 11:14AM

End Date 08/31/2017 Time 11:14AM

Copy From Go

Preview By: By Line

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

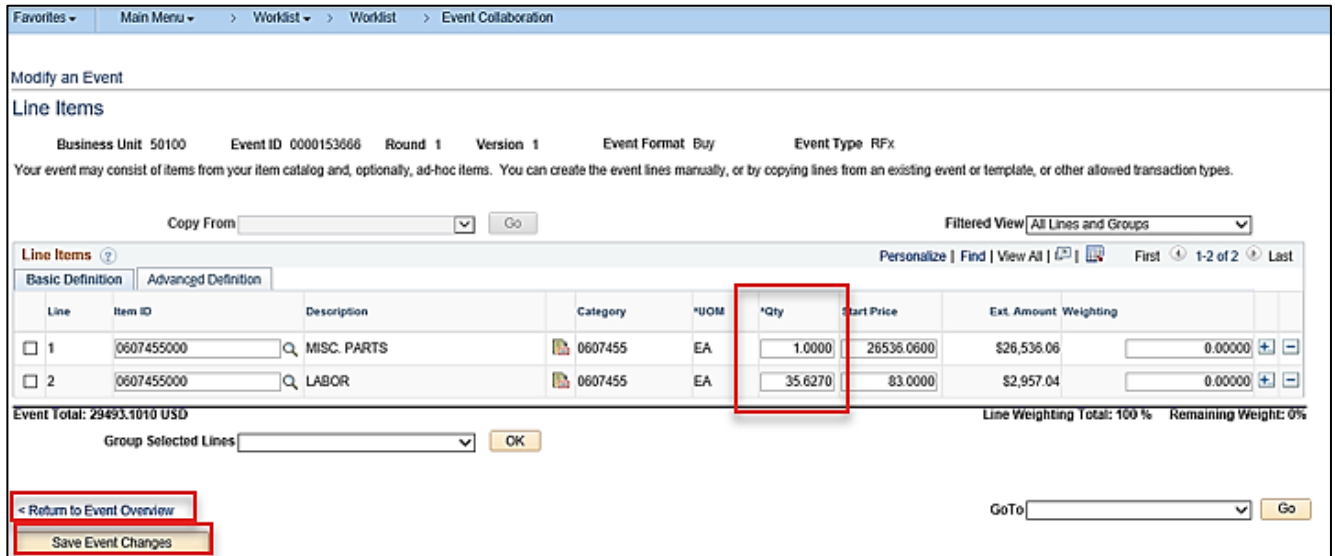
Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* 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](#)

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 0000153666 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 Go Filtered View All Lines and Groups

Line Items Personalize | Find | View All | First 1-2 of 2 Last

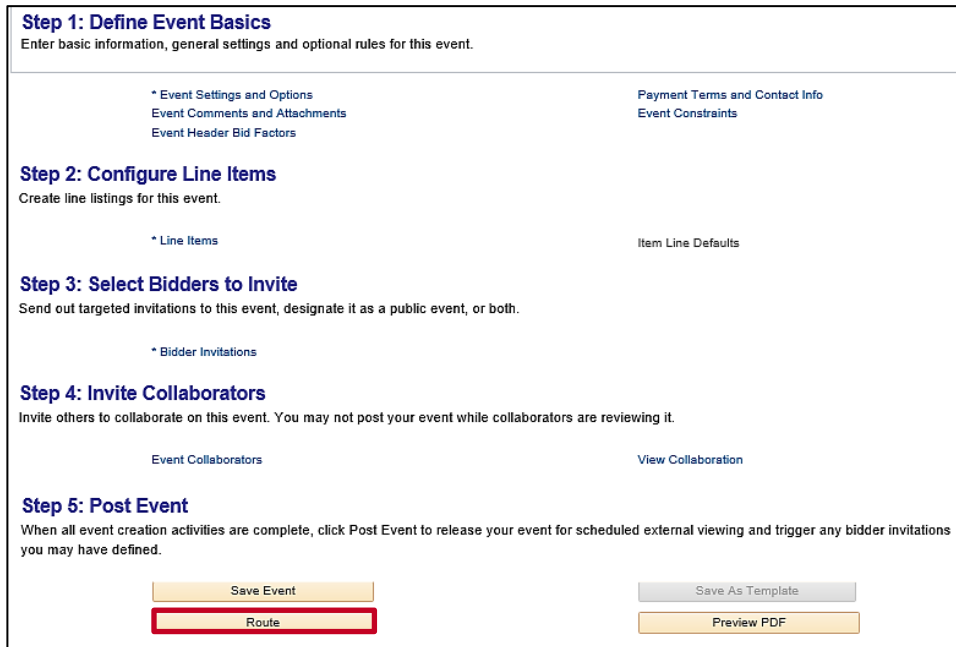
Line	Item ID	Description	Category	UOM	Qty	Start Price	Est. Amount	Weighting
<input type="checkbox"/> 1	0607455000	MISC. PARTS	0607455	EA	1.0000	26536.0600	\$26,536.06	0.00000
<input type="checkbox"/> 2	0607455000	LABOR	0607455	EA	35.6270	83.0000	\$2,957.04	0.00000

Event Total: 29493.1010 USD Line Weighting Total: 100 % Remaining Weight: 0%

Group Selected Lines OK

< Return to Event Overview Save Event Changes GoTo Go

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.



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.

Save Event Save As Template Route Preview PDF

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.

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 to the next Collaborator, click the **Yes** button. The **Modify an Event – Event Summary** page displays.

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](#) [View All Attachments for Event Plan Task Associations](#)

Collaboration Status: **Available**
Last Updated By: HALL, JAMES

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

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

[Favorites](#) > [Main Menu](#) > [Worklist](#) > [Worklist](#) > [Event Collaboration](#)

Review Event Collaboration

Business Unit 50100 Event ID 0000153666 Round 1 Version 1
 Event Name Collaboration Test Format Buy Type RFX
[Event Header](#) **Event Lines** Bid Factors
[Invited Bidders](#) [Constraints](#) [Comments and Attachments](#)

Filter By

Event Line [Find](#) | [View All](#) First 1 of 1 Last

Line Nbr 1 Item ID 0607455000 Description MISC. PARTS

Line Summary [Personalize](#) | [Find](#) | [View All](#) First 1-2 of 2 Last

Field	Name	Date/Time	Action	Value
Qty	Original	02/22/2017 6:20:37PM	Update	1
Qty	HALL, JAMES	02/22/2017 6:20:37PM	Update	2

Line Details [Personalize](#) | [Find](#) | [View All](#) First 1 of 1 Last

Field	Name	Date/Time	Action	Value

[Return to Event Overview](#)
[Return to Search](#) [Refresh](#)

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

Review Event Collaboration

Business Unit 50100 Event ID 0000153666 Round 1 Version 1
 Event Name Collaboration Test Format Buy Type RFx

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

Filter By

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

Collaboration Input Comments

Field	Name	Date/Time	Action	Value
Comments	HALL, JAMES	02/22/2017 6:20:36PM	Add	The event is well prepared and is approved to proceed with an advertisement. - CJP 02/22/17

Event Line Find | View All First 1 of 1 Last

Line Nbr Item ID Description

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

Collaboration Input Comments

Field	Name	Date/Time	Action	Value

[Return to Event Overview](#)

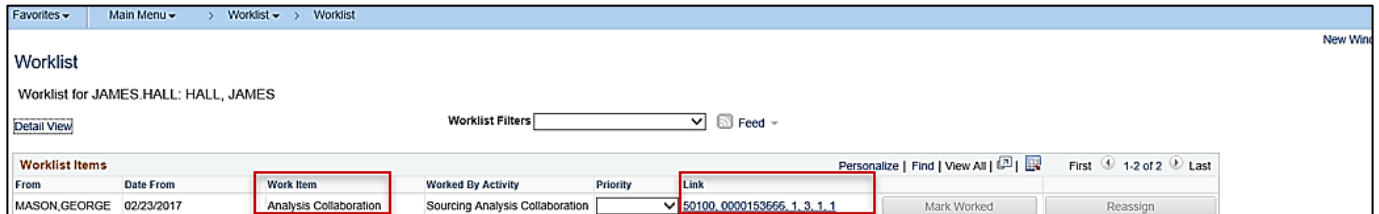
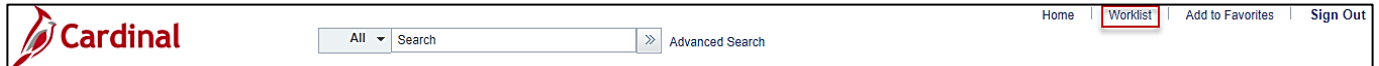
[Return to Search](#) [Refresh](#)

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.

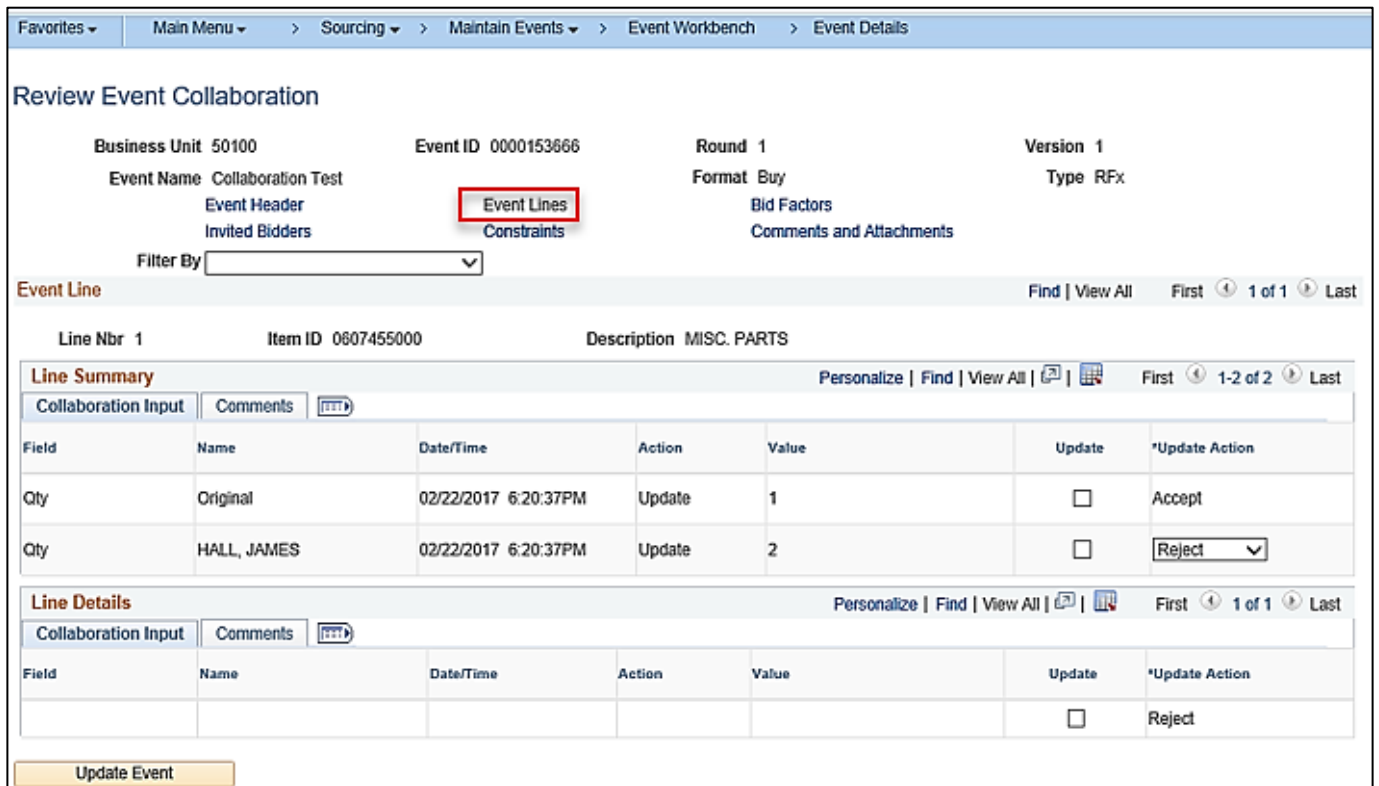
Review Event Collaboration (SS Buyer)

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.

[Favorites](#) > [Main Menu](#) > [Sourcing](#) > [Maintain Events](#) > [Event Workbench](#) > [Event Details](#)

Review Event Collaboration

Business Unit 50100 Event ID 0000153666 Round 1 Version 1
 Event Name Collaboration Test Format Buy Type RFx
 Event Header Event Lines Bid Factors
 Invited Bidders Constraints Comments and Attachments

Filter By:

Event Line Find | View All First 1 of 1 Last

Line Nbr 1 Item ID 0607455000 Description MISC. PARTS

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

Collaboration Input **Comments**

Field	Name	Date/Time	Action	Value	Update	*Update Action
Qty	Original	02/22/2017 6:20:37PM	Update	1	<input type="checkbox"/>	Accept
Qty	HALL, JAMES	02/22/2017 6:20:37PM	Update	2	<input checked="" type="checkbox"/>	Accept

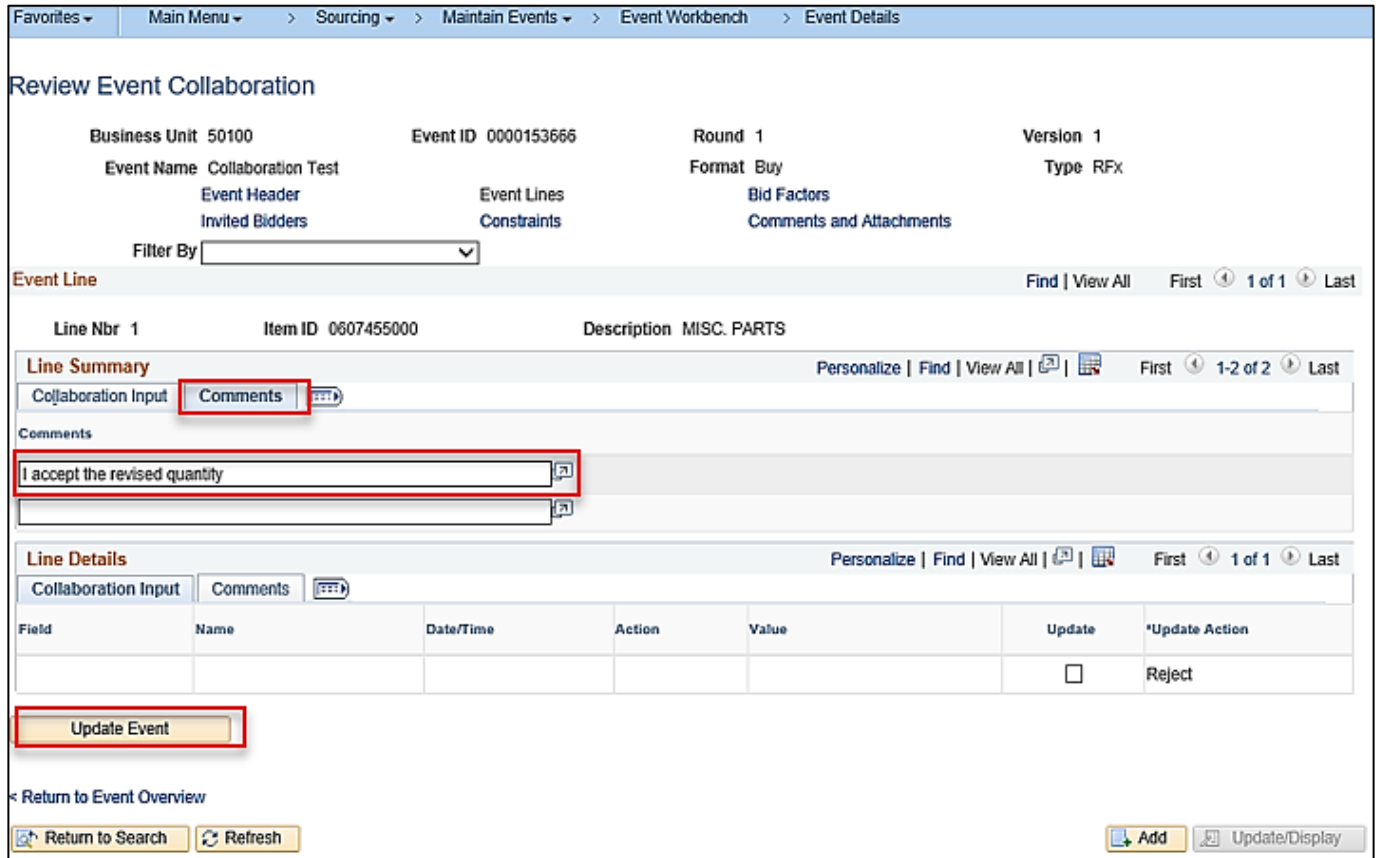
Line Details Personalize | Find | View All | First 1 of 1 Last

Collaboration Input **Comments**

Field	Name	Date/Time	Action	Value	Update	*Update Action
					<input type="checkbox"/>	Reject

[Return to Event Overview](#)

- 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.
- 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.
- Click the **Comments** tab.



Review Event Collaboration

Business Unit 50100 Event ID 0000153666 Round 1 Version 1
 Event Name Collaboration Test Format Buy Type RFx
 Event Header Event Lines Bid Factors
 Invited Bidders Constraints Comments and Attachments

Filter By

Event Line Find | View All First 1 of 1 Last

Line Nbr 1 Item ID 0607455000 Description MISC. PARTS

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

Collaboration Input **Comments**

Comments

I accept the revised quantity

Line Details Personalize | Find | View All | First 1 of 1 Last

Collaboration Input **Comments**

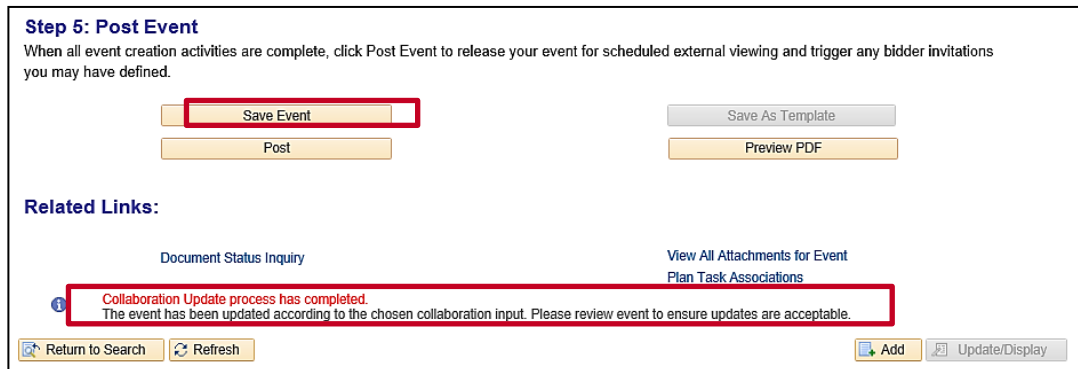
Field	Name	Date/Time	Action	Value	Update	*Update Action
					<input type="checkbox"/>	Reject

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 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 Save As Template
 Post Preview PDF

Related Links:

[Document Status Inquiry](#) [View All Attachments for Event](#)
[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 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](#) [View All Attachments for Event](#)
[Plan Task Associations](#)

Collaboration Status: **Available**
 Last Updated By: MASON, GEORGE

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 0000153666 Round 1 Version 1
 Event Name Collaboration Test Format Buy Type RFX

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

Filter By

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

Field	Name	Date/Time	Action	Value	Update	*Update Action
Comments	HALL, JAMES	02/22/2017 6:20:36PM	Add	The event is well prepared and is approved to proceed with an advertisement. - CJP 02/22/17	<input type="checkbox"/>	Reject

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

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

Field	Name	Date/Time	Action	Value	Update	*Update Action
					<input type="checkbox"/>	Reject

< [Return to Event Overview](#)

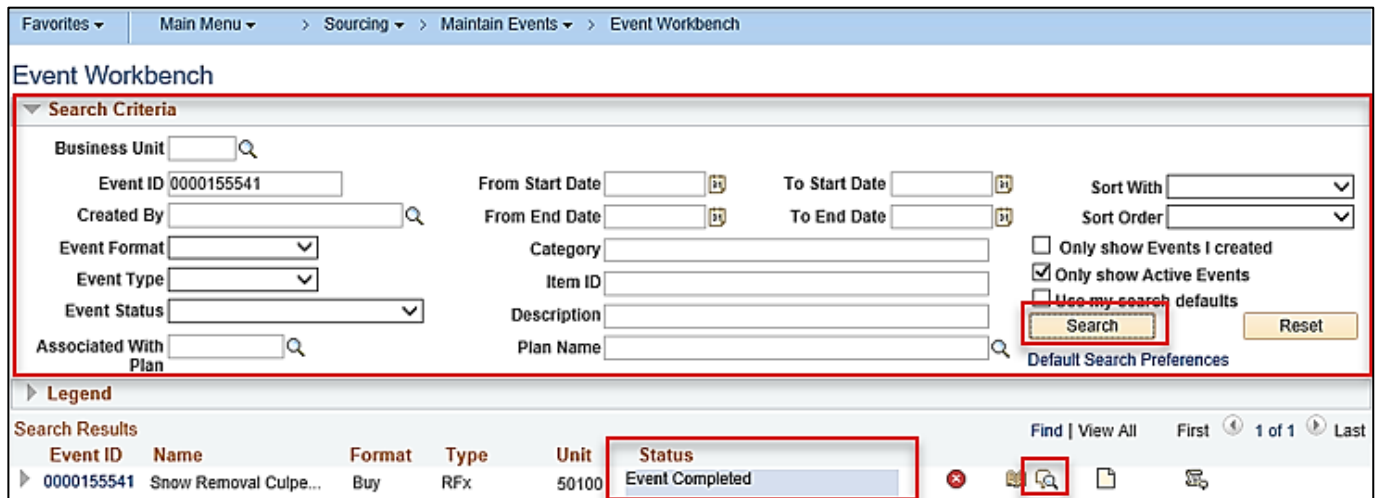
14. By clicking one of the hyperlinks at the top of the page (i.e., **Event Header**, **Event Lines**, **Bid Factors**, or **Comments and Attachments**) you can review the specific changes.
15. The collaboration actions display with the action taken in the **Update Action** field.
16. The event can be posted for advertisement following the normal strategic sourcing process.

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

Once an event's 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



Event Workbench

Search Criteria

Business Unit

Event ID

Created By

Event Format

Event Type

Event Status

Associated With Plan

From Start Date

To Start Date

From End Date

To End Date

Category

Item ID

Description

Plan Name

Sort With

Sort Order

Only show Events I created

Only show Active Events

Use my search defaults

Default Search Preferences

Legend

Search Results

Event ID	Name	Format	Type	Unit	Status
0000155541	Snow Removal Culpe...	Buy	RFx	50100	Event Completed

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

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.

Analyze Total

Analyze Total [Analyze Line](#)

Business Unit: 50100 Event ID: 0000153666 Round: 1 Version: 3 Event Name: Collaboration Test

Event Format: Buy Event Type: RFX Currency: USD End Date: 02/16/2017 11:14AM EST Status: Pending Award

▶ Bid Analysis and Display Options ?

Analysis

Bidder Name		Carter Machinery Company George Maker	
Inc			
Event Version Responded To	2	2	
Bid Number	1	1	
Total Bid Amount	75,344.05	68,275.24	
Total Bid Cost	0.00	0.00	
Total Event Score	0.00	0.00	
Total Header Cost	0.00	0.00	
Total Header Score	0.00	0.00	

Bid Action:

Reject Reason:

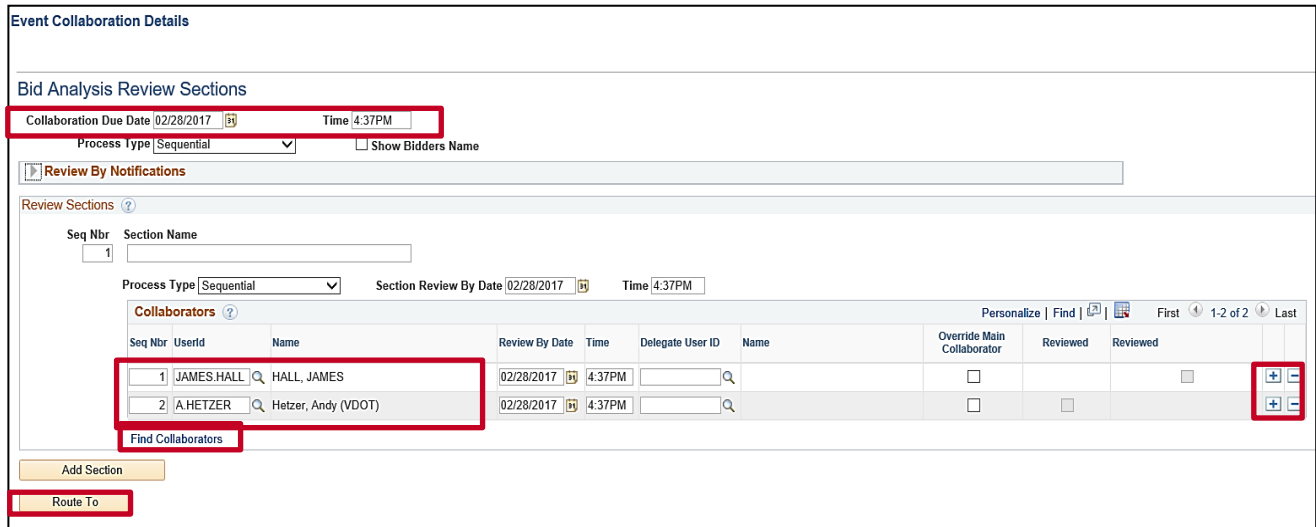
Award by Percent:

Hide Bid:

Analyze Total | [Analyze Line](#)

- 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.



Event Collaboration Details

Bid Analysis Review Sections

Collaboration Due Date: 02/28/2017 4:37PM

Process Type: Sequential Show Bidders Name

[Review By Notifications](#)

Review Sections

Seq Nbr: 1 Section Name: []

Process Type: Sequential Section Review By Date: 02/28/2017 4:37PM

[Collaborators](#)

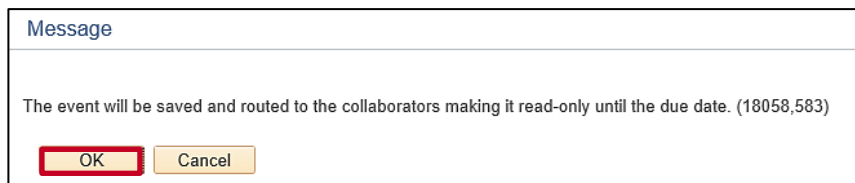
Seq Nbr	Userld	Name	Review By Date	Time	Delegate User ID	Name	Override Main Collaborator	Reviewed	Reviewed
1	JAMES.HALL	HALL, JAMES	02/28/2017	4:37PM			<input type="checkbox"/>		
2	A.HETZER	Hetzer, Andy (VDOT)	02/28/2017	4:37PM			<input type="checkbox"/>	<input type="checkbox"/>	

[Find Collaborators](#)

[Add Section](#)

[Route To](#)

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 – Userld** field.
7. In the **Collaborator Userld** 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 Userld** 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.



Message

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

[OK](#) [Cancel](#)

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.

Favorites ▾ Main Menu ▾ Sourcing ▾ Maintain Events ▾ Event Workbench ▾ Analyze Events

Analyze Total

Analyze Total Analyze Line

Business Unit: 50100 **Event ID:** 0000153666 **Round:** 1 **Version:** 3 **Event Name:** Collaboration Test

Event Format: Buy **Event Type:** RFx **Currency:** USD **End Date:** 02/16/2017 11:14AM EST **Status:** Collaborating Bid Analysis **Go To:**

?

Analysis

	Bidder Name Carter Machinery Company	George Maker
	Inc	
Event Version Responded To	2	2
Bid Number	1	1
Total Bid Amount	75,344.05	68,275.24
Total Bid Cost	0.00	0.00
Total Event Score	0.00	0.00
Total Header Cost	0.00	0.00
Total Header Score	0.00	0.00

Bid Action

Reject Reason

Award by Percent

Hide Bid

 << < > >>

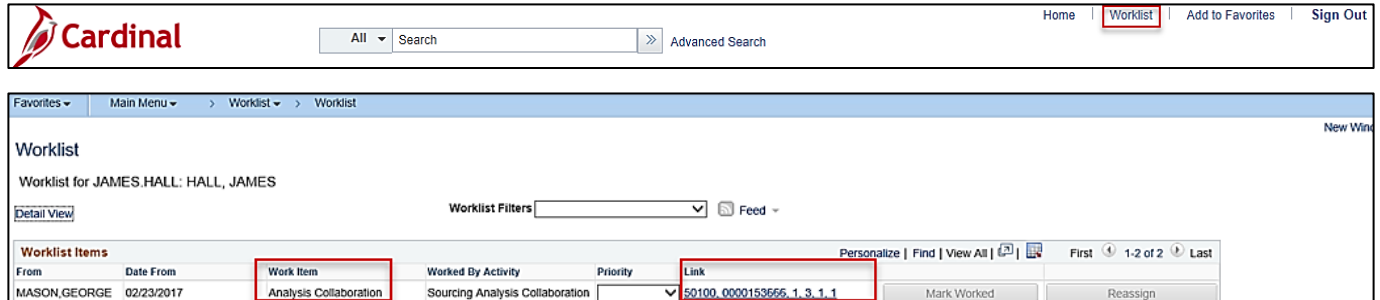
Analyze Total | Analyze Line

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**



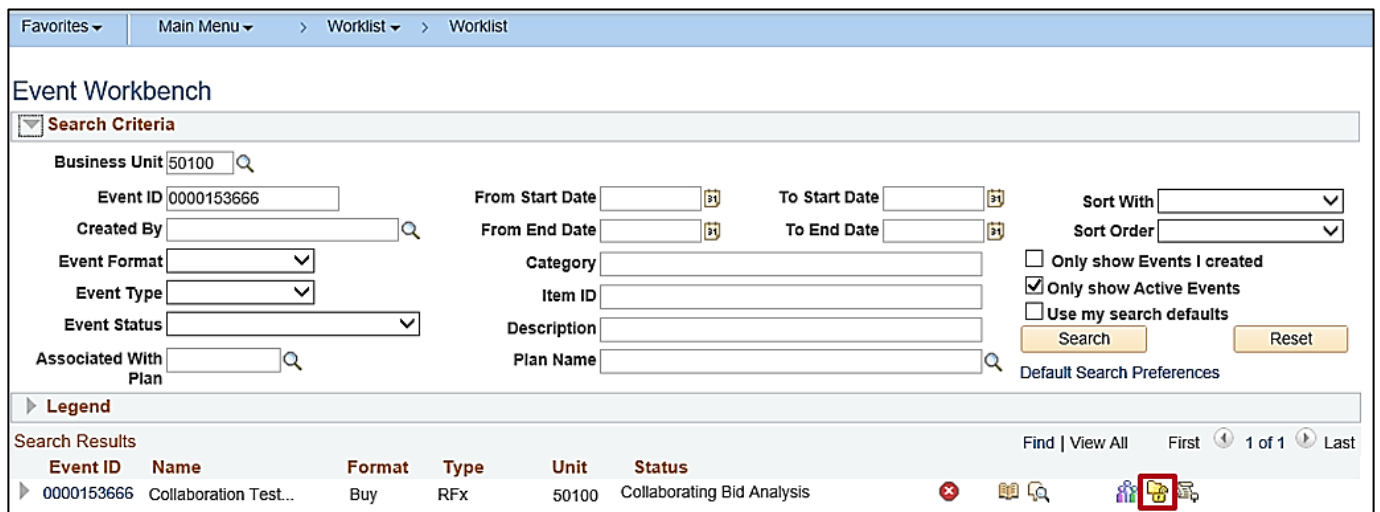
Cardinal | Home | **Worklist** | Add to Favorites | Sign Out

Search [All] [Search] [Advanced Search]

Worklist for JAMES.HALL: HALL, JAMES

From	Date From	Work Item	Worked By Activity	Priority	Link
MASON,GEORGE	02/23/2017	Analysis Collaboration	Sourcing Analysis Collaboration		50100.0000153666.1.3.1.1

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.



Event Workbench

Search Criteria

Business Unit: 50100

Event ID: 0000153666

Created By: [Search]

Event Format: [Dropdown]

Event Type: [Dropdown]

Event Status: [Dropdown]

Associated With Plan: [Search]

From Start Date: [Calendar] To Start Date: [Calendar]

From End Date: [Calendar] To End Date: [Calendar]

Category: [Text]

Item ID: [Text]

Description: [Text]

Plan Name: [Search]

Sort With: [Dropdown]

Sort Order: [Dropdown]

Only show Events I created

Only show Active Events

Use my search defaults

Search [Reset]

Default Search Preferences

Legend

Search Results

Event ID	Name	Format	Type	Unit	Status
0000153666	Collaboration Test...	Buy	RFX	50100	Collaborating Bid Analysis

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

[Favorites](#) > [Main Menu](#) > [Sourcing](#) > [Maintain Events](#) > [Event Workbench](#) > [Analyze Events](#)

Analyze Total

[Analyze Line](#)
 Business Unit: 50100 Event ID: 0000153666 Round: 1 Version: 3 Event Name: Collaboration Test
 Event Format: Buy Event Type: RFX Currency: USD End Date: 02/16/2017 11:14AM EST Status: Collaborating Bid Analysis Go To:

[Bid Analysis and Display Options](#) ?

Analysis

Bidder Name Carter Machinery Company George Maker Inc
 Event Version Responded To 2
 Bid Number 1

Total Bid Amount	75,344.05	68,275.24
Total Bid Cost	0.00	0.00
Total Event Score	0.00	0.00
Total Header Cost	0.00	0.00
Total Header Score	0.00	0.00

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

 << < > >>

Analyze Total | Analyze Line

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

[Favorites](#) > [Main Menu](#) > [Worklist](#) > [Worklist](#) > [Event Collaboration](#) > [Analysis Collaboration](#)

Analyze Line

Analyze Total Analyze Line
 Business Unit: 50100 Event ID: 0000153666 Round: 1 Version: 3 Event Name: Collaboration Test
 Event Format: Buy Event Type: RFX Currency: USD End Date: 02/16/2017 11:14AM EST Status: Collaborating Bid Analysis Go To:

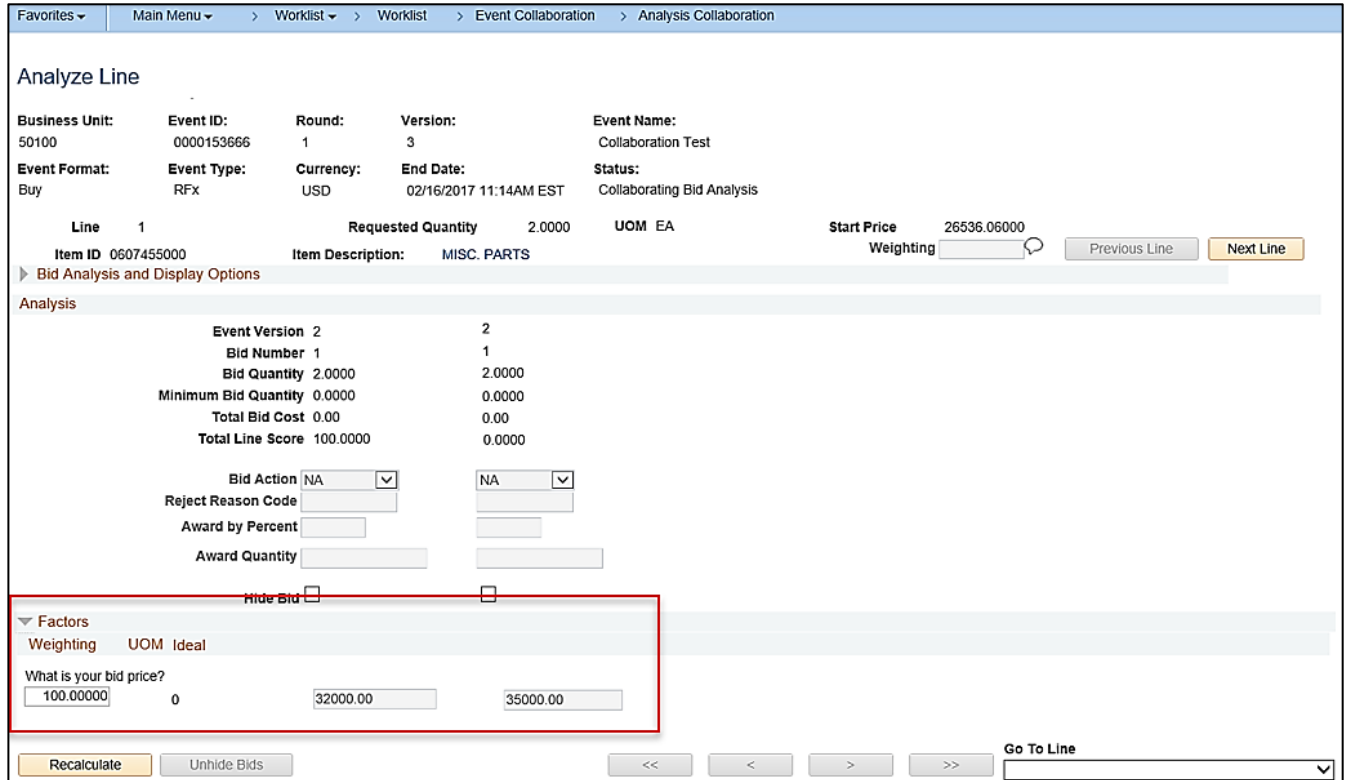
[Line Items](#) ? Personalize | Find | View All | First 1-2 of 2 Last

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	0607455000	MISC. PARTS	0607455	EA	26,536.06000	2.0000	0.0000	0.00000	Open	Analyze
2	0607455000	LABOR	0607455	EA	83.00000	35.6270	0.0000	0.00000	Open	Analyze

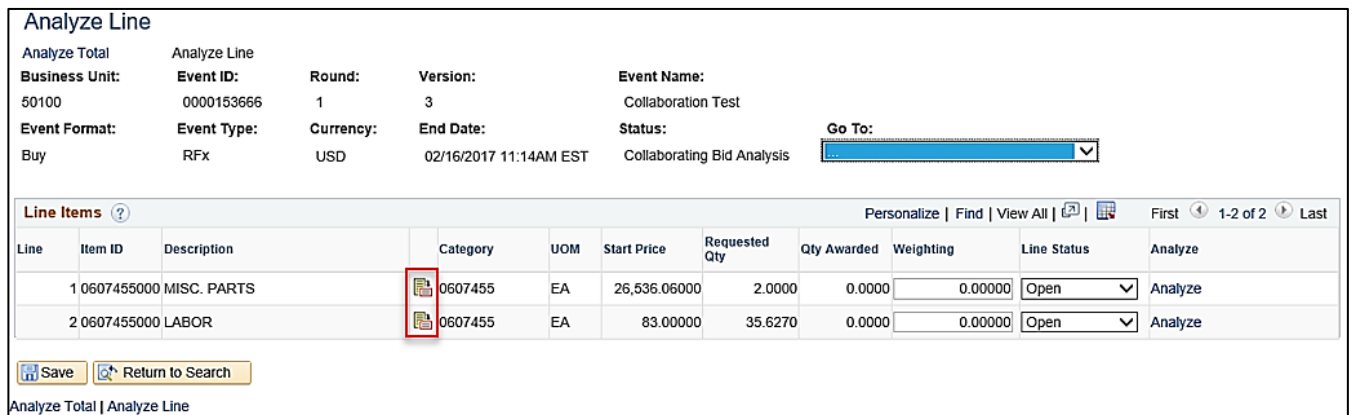
Analyze Total | Analyze Line

501 PR345: Strategic Sourcing Collaboration

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

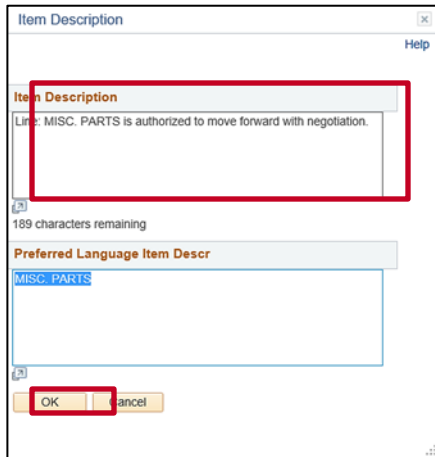


- Review the line bid price information.
- Click the **OK** button. The original **Analyze Line** page displays.

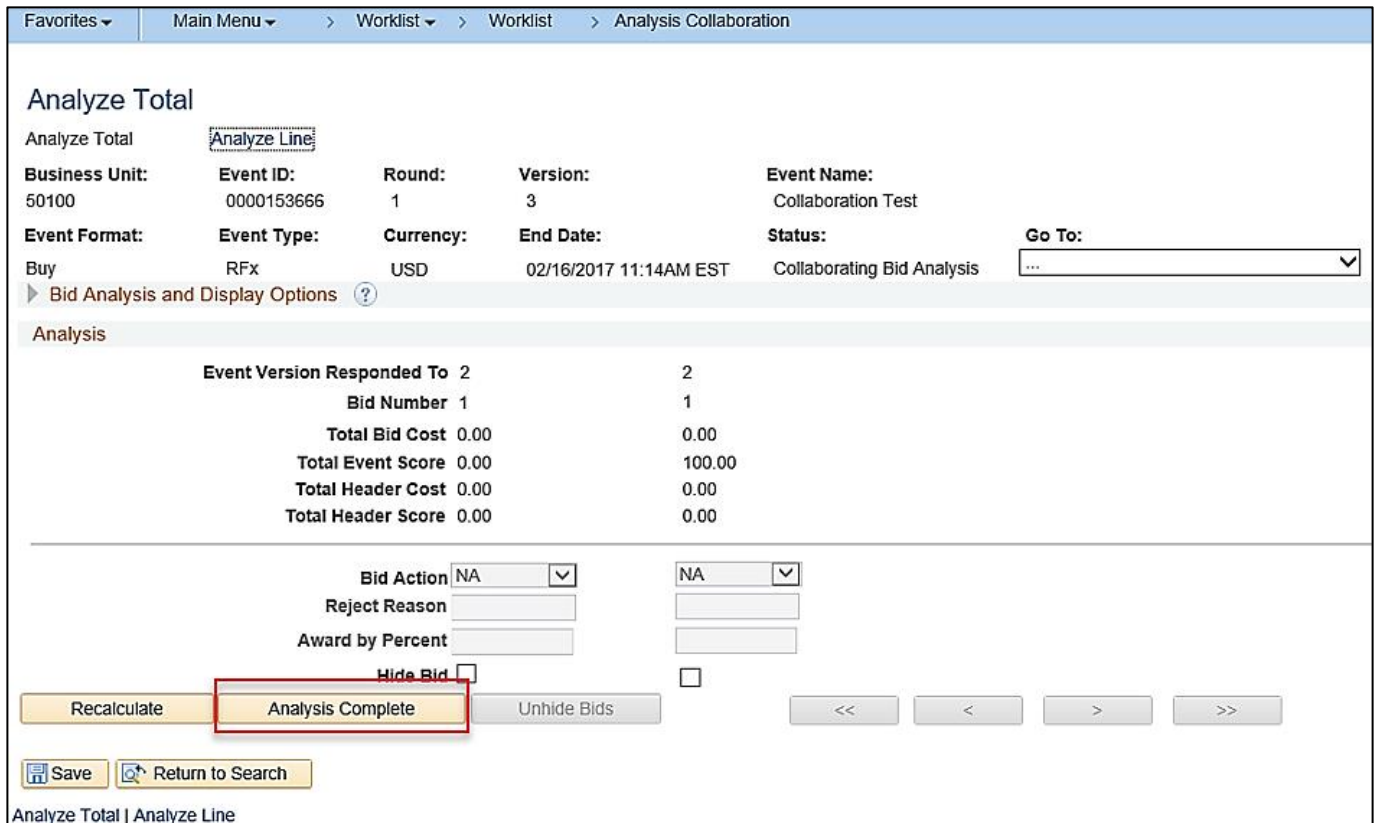


Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	0607455000	MISC. PARTS	0607455	EA	26,536.06000	2.0000	0.0000	0.00000	Open	Analyze
2	0607455000	LABOR	0607455	EA	83.00000	35.6270	0.0000	0.00000	Open	Analyze

- 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 not 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.



Analyze Total

Analyze Total Analyze Line

Business Unit: 50100	Event ID: 0000153666	Round: 1	Version: 3	Event Name: Collaboration Test
Event Format: Buy	Event Type: RFx	Currency: USD	End Date: 02/16/2017 11:14AM EST	Status: Collaborating Bid Analysis

Go To:

► Bid Analysis and Display Options ?

Analysis

Event Version Responded To	2	2
Bid Number	1	1
Total Bid Cost	0.00	0.00
Total Event Score	0.00	100.00
Total Header Cost	0.00	0.00
Total Header Score	0.00	0.00

Bid Action NA NA

Reject Reason

Award by Percent

Hide Bid

Recalculate **Analysis Complete** Unhide Bids << < > >>

Save Return to Search

Analyze Total | Analyze Line

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

Message

Are you sure you want to mark your collaboration complete for this event? (18058,594)

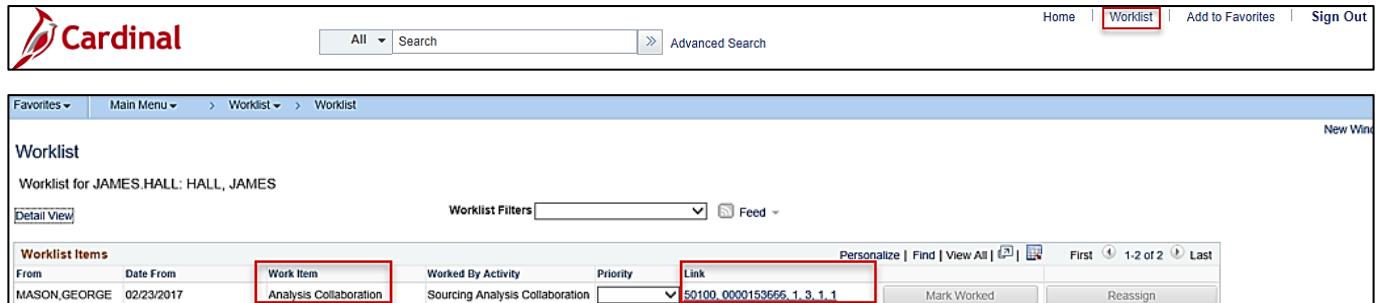
Once the event is marked complete you will not be able to edit it anymore.

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**



Cardinal | All Search | Advanced Search | Home | **Worklist** | Add to Favorites | Sign Out

Worklist for JAMES.HALL: HALL, JAMES

From	Date From	Work Item	Worked By Activity	Priority	Link
MASON,GEORGE	02/23/2017	Analysis Collaboration	Sourcing Analysis Collaboration		50100.0000153666.1.3.1.1

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.

[Favorites](#) > [Main Menu](#) > [Sourcing](#) > [Maintain Events](#) > [Event Workbench](#) > [Analyze Events](#)

Analyze Total

[Analyze Total](#) **Analyze Line**

Business Unit: 50100 **Event ID:** 0000153666 **Round:** 1 **Version:** 3 **Event Name:** Collaboration Test

Event Format: Buy **Event Type:** RFx **Currency:** USD **End Date:** 02/16/2017 11:14AM EST **Status:** Collaborating Bid Analysis **Go To:**

Bid Analysis and Display Options ?

Analysis

	Bidder Name	Carter Machinery Company	George Maker
	Inc		
Event Version Responded To	2		
Bid Number	1		
Total Bid Amount	75,344.05		68,275.24
Total Bid Cost	0.00		0.00
Total Event Score	0.00		0.00
Total Header Cost	0.00		0.00
Total Header Score	0.00		0.00

Bid Action:

Reject Reason:

Award by Percent:

Hide Bid:

Analyze Total | Analyze Line

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

[Favorites](#) > [Main Menu](#) > [Worklist](#) > [Worklist](#) > [Event Collaboration](#) > [Analysis Collaboration](#)

Analyze Line

[Analyze Total](#) Analyze Line
Business Unit: 50100 **Event ID:** 0000153666 **Round:** 1 **Version:** 3 **Event Name:** Collaboration Test
Event Format: Buy **Event Type:** RFX **Currency:** USD **End Date:** 02/16/2017 11:14AM EST **Status:** Collaborating Bid Analysis **Go To:**

Line Items ? Personalize | Find | View All | | First 1-2 of 2 Last

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	0607455000	MISC. PARTS	0607455	EA	26,536.06000	2.0000	0.0000	<input type="text" value="0.00000"/>	<input type="text" value="Open"/>	Analyze
2	0607455000	LABOR	0607455	EA	83.00000	35.6270	0.0000	<input type="text" value="0.00000"/>	<input type="text" value="Open"/>	Analyze

[Analyze Total](#) | [Analyze Line](#)

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.

Analyze Total

Analyze Total [Analyze Line](#)

Business Unit:	Event ID:	Round:	Version:	Event Name:	
50100	0000153666	1	3	Collaboration Test	
Event Format:	Event Type:	Currency:	End Date:	Status:	Go To:
Buy	RFX	USD	02/16/2017 11:14AM EST	Pending Award	...

▶ [Bid Analysis and Display Options](#) ?

Analysis

Review Type

Bidder Name Carter Machinery Company George Maker Inc	
Event Version Responded To	2 2
Bid Number	1 1
Total Bid Amount	75,344.05 68,275.24
Total Bid Cost	0.00 0.00
Total Event Score	0.00 0.00
Total Header Cost	0.00 0.00
Total Header Score	0.0000 0.0000

Bid Action <input type="text" value="NA"/>	<input type="text" value="Award"/>
Reject Reason <input type="text"/>	<input type="text" value="Counter"/>
Award by Percent <input type="text"/>	<input type="text" value="Disallow"/>
Hide Bid <input type="checkbox"/>	<input type="text" value="NA"/>
	<input type="text" value="Reject"/>

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 **Learning**.