501 PR345: Strategic Sourcing

Instructor Led Training

Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

This course, and the supplemental resources listed below, are located on the Cardinal website (www.cardinalproject.virginia.gov) under Learning.

Cardinal Reports Catalogs are located on the Cardinal website under Resources:

- Instructor led and web based training course materials

- Job aids on topics across all functional areas

- Glossary of frequently used terms

The Cardinal screenshots included in this training course show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.

Course Objectives

After completing this course, you will be able to:

- Recognize key strategic sourcing concepts

- Create, modify, and manage Strategic Sourcing events in Cardinal

- Analyze bids/proposals

- Award Events

- Understand how strategic sourcing integrates with other Cardinal modules

- Understand how strategic sourcing integrates with external systems

Agenda

1	Understand Strategic Sourcing
2	Create Event
3	Maintain Events
4	Analyze Bids/Proposals and Awarding Events
5	Strategic Sourcing Hands-on Practice

Lesson 1: Introduction

1	Understanding Strategic Sourcing

This lesson covers the following topics:

- Procurement Overview

- Strategic Sourcing Key Concepts

- Procurement Process Overview

- Strategic Sourcing Overview

Procurement Overview

The Procurement functional area of Cardinal includes four modules:

Purchasing

The Purchasing module includes the buying of goods and services (Procurement) by creating and processing requisitions, purchase orders (PO), receipts, Procurement Card (PCard), and Integrated Supply Services Program (ISSP) transactions.

eProcurement

Like Purchasing, the eProcurement module provides for Procurement but is web-based. It is similar to an online shopping cart experience for users requesting goods and/or services.
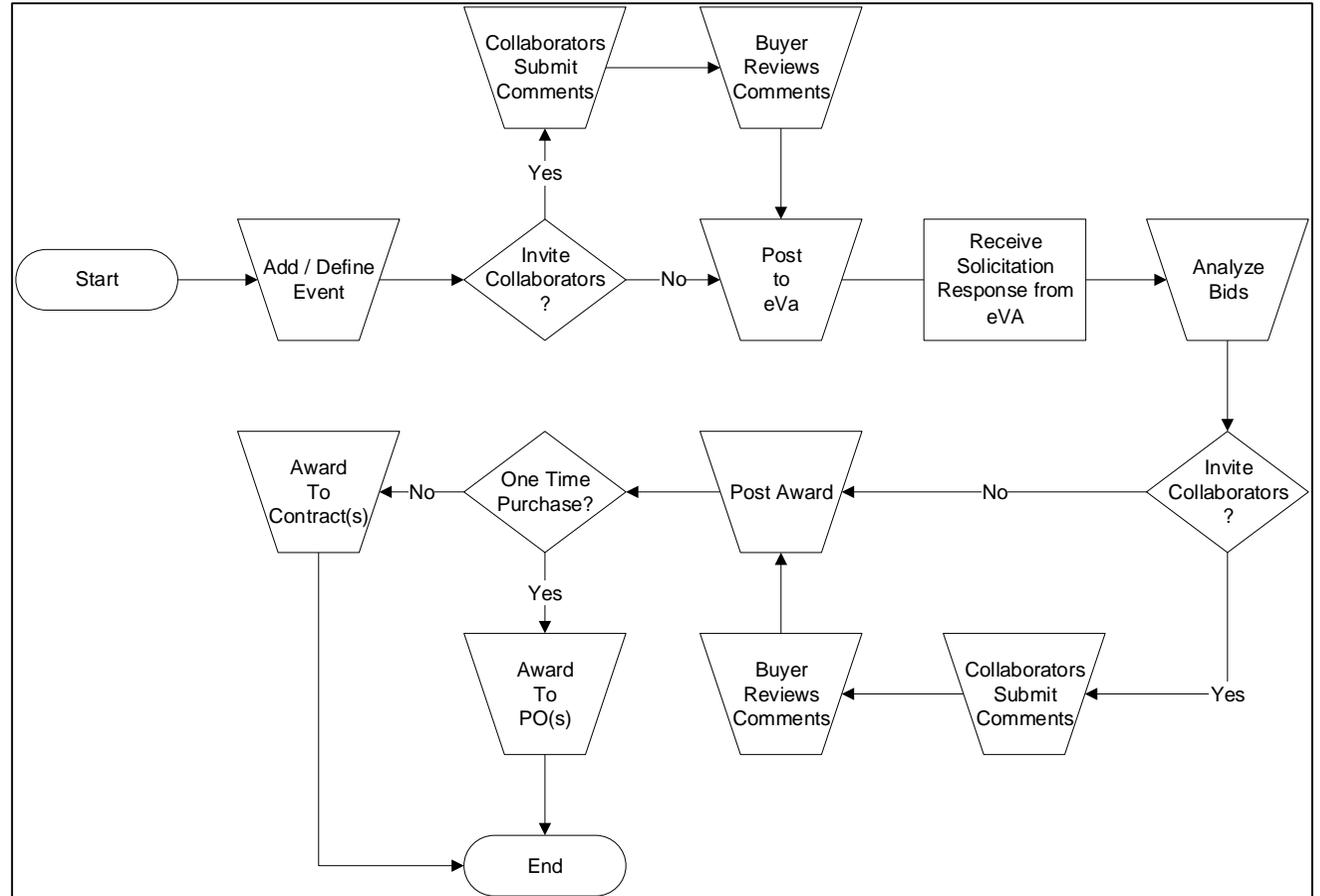
Strategic Sourcing

The Strategic Sourcing module allows users to create and award bids/proposals to purchase orders or contracts.

Procurement Contracts

The Procurement Contracts module builds, manages, and archives all Cardinal contract related information.

Cardinal Functional Areas

Accounts Payable · Accounts Receivable · Payroll · CARDINAL · General Ledger · Project Accounting · Procurement

Modules

| Purchasing |
| eProcurement |
| Strategic Sourcing |
| Procurement Contracts |
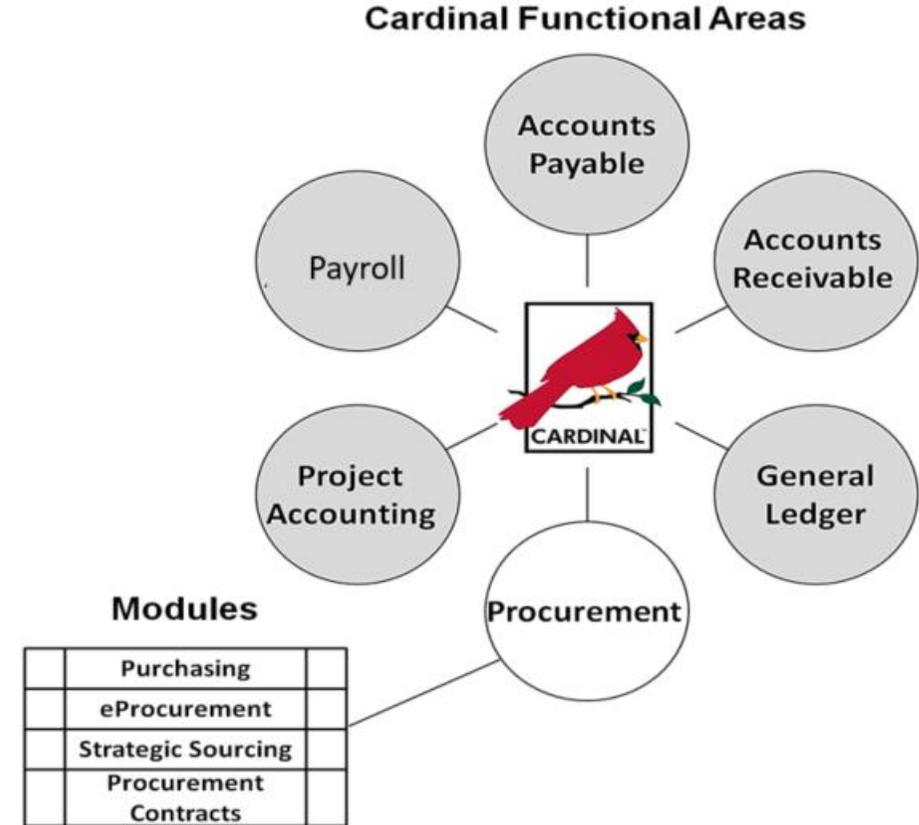
Strategic Sourcing Key Concepts

Key concepts include:

- A Strategic Sourcing event involves the solicitation of quotes, bids/proposals, or offers to establish contracts and/or purchase orders (POs).

- Cardinal provides the Strategic Sourcing (SS) Buyer with a means to create, manage, and award Strategic Sourcing Events.

- The most common event is the Invitation for Bid (IFB) which is primarily awarded to the lowest responsive and responsible bidder meeting the required specifications.

- Similar functionality is provided to create, manage, and award the Two-Step (IFB) and Request for Proposal (RFP) events. In comparison to the lowest price, these event types are awarded based on the ranking of the Bidder/Offerors' responses and subsequent negotiations, to achieve the best value.

- RFPs are commonly known as competitive negotiations. These events are created with criteria that are weighted (ranked) by level of importance and scored based on the Offerors' submitted proposals. The lowest price is only one of multiple elements used in determining who will receive the award.

Procurement Process Overview

There are seven key processes in procurement:

- Add/Update Requisitions

- Create Strategic Sourcing Events

- Add/Update Contracts

- Add/Update Purchase Orders

- Add/Update Receipts

- Procurement Card Processing

- Integrated Supply Services Program (ISSP) Processing

Procurement Process Overview (continued)

Strategic Sourcing Overview

Strategic Sourcing allows users to create and award bids/proposals to purchase orders or contracts. Sourcing events are electronically sent to eVA for posting online in order to obtain bids on items and/or services.

Strategic Sourcing involves several key steps:

- Add/Define Event

- Event Collaboration*

- Receive and Enter Solicitation Response(s)

- Analyze Bid Response(s)

- Response Collaboration*

- Award to Contract(s) or Purchase Order(s)

*For more detailed information about **Collaboration**, see the job aid entitled **501 PR345: Strategic Sourcing Collaboration** located on the Cardinal website in **Job Aids** under **Learning**.

Strategic Sourcing Overview (continued)
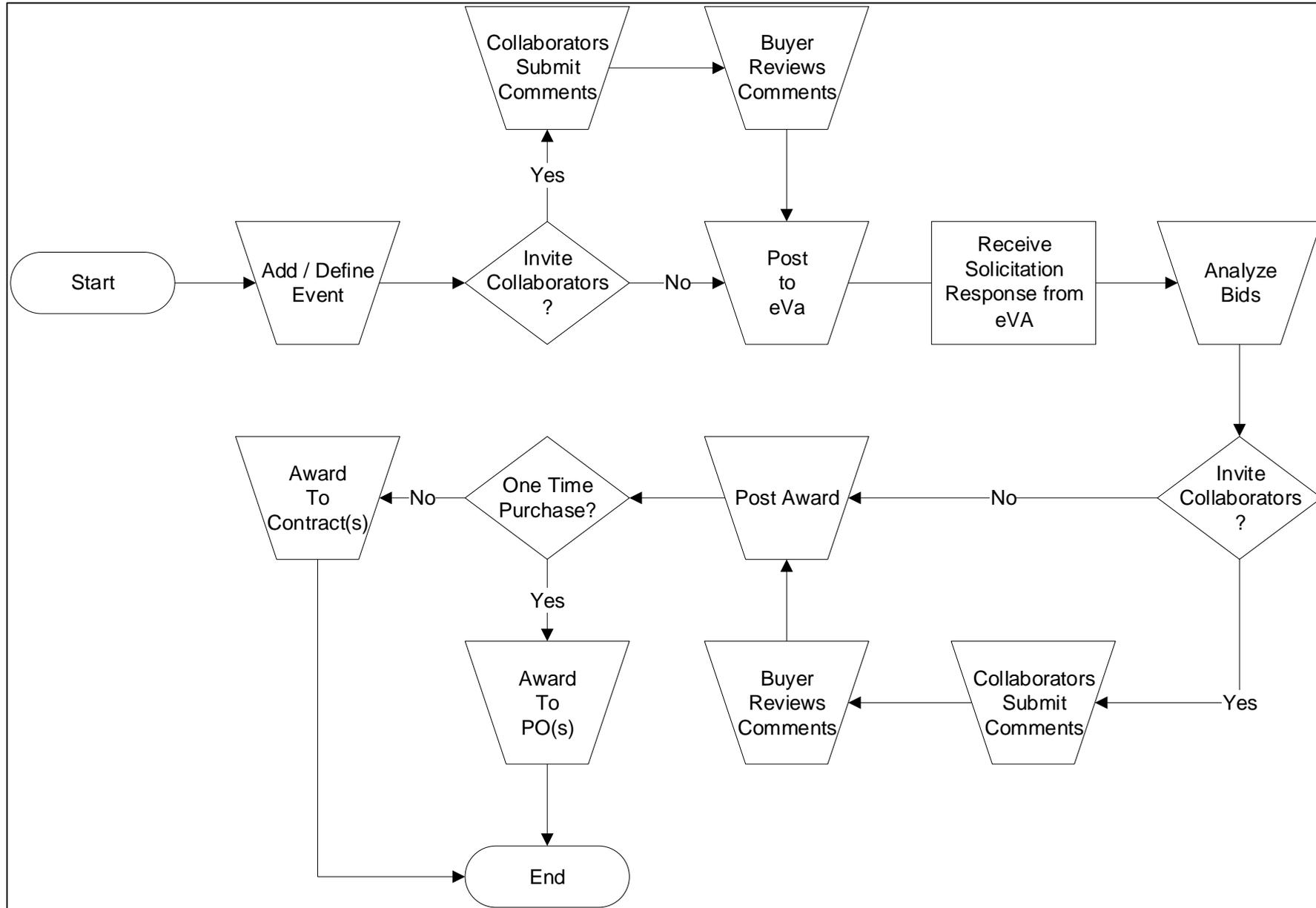
Lesson 1: Summary

1	Understanding Strategic Sourcing

In this course, you learned:

- The procurement functional area is composed of several modules: Purchasing, eProcurement, Strategic Sourcing, Procurement Contracts, and Receipts.

- A strategic sourcing event is the process of soliciting quotes and bids/proposals to establish contracts and/or purchase orders.

Lesson 2: Introduction

2	Create Event

This lesson covers the following topics:

- Create Event (Ad Hoc or Copy)

- Define Event Basics

- Configure Line Items

- Invite Collaborators

- Post an Event for Bidding

Create Events

To add an event, use the **Create Events** page. Navigate to this page using the following path:

Main Menu > Sourcing > Create Events > Event Details

Select the **Add a New Value** tab. Key fields that need to be defined include:

- **Business Unit**: Confirm the Business Unit

- **Event ID:** Uniquely identifies the event and is automatically assigned (do not modify)

- **Event Format**: **Buy**

- **Event Type**: **RFx**

Click **Add** to go to the **Event Summary** page to create the event.

Most events have an **Event Format** of **Buy** and **Event Type** of **RFx** or **RFI**.

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

Create Events

Find an Existing Value | Add a New Value

Business Unit 50100
Event ID NEXT
Event Round 1
Event Version 1
Event Format Buy
Event Type RFx
Proxy Bidding (Auctions Only) Disabled

Add

Find an Existing Value | Add a New Value

Buy can be an Invitation For Bid (IFB) or a Request For Proposal (RFP). **RFx** can be an Invitation For Bid (IFB), Request For Proposal (RFP), or Two-Step Bid. **RFI** is a Request for Information.

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Create Events (continued)

The **Event Summary** page is updated with the values you previously entered on the **Create Events** page

When creating an event, provide an overall description of the event at the header level, with item specific details at the line level. It is possible to copy a previous event, purchase order, requisition, contract, or RFI to create a new event, and save events to use as templates.

On the **Event Summary** page enter the:

- **Solicitation Type**

- **Event Name**

- **Description**

- **Preview Date**: Collaboration end date/time (this date must be <u>prior</u> to the Start Date)

- **Start Date**: Bids can be entered

- **End Date**: Bids can no longer be entered

The **Preview By** drop-down box allows the printed version to show the event either by line, lot (group), or total

Create Events (continued)

On the **Event Summary** page, the **Copy From** drop-down allows populating fields into the event.

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Click on the **Arrow** icon next to the **Description** field to open a larger **Description** box/field. Use the Book Check icon to check spelling errors.

Create Events (continued)

The next section on the **Create an Event – Event Summary** page lists the five steps for creating an event.

Under **Step 1: Define Event Basics**, click on the **Event Settings and Options** hyperlink to set options for the event.

Define Event Basics

The **Event Settings and Options** link provides for the following options to be set as needed:

- **Allow Bidder XML Downloads:** Do <u>not</u> select.

- **Bid Required on All Lines:** Select if applicable and/or awarding by Lot/Group.

- **Multiple Bids Allowed**: Will be automatically checked.

- **Allow Edit of Posted Bids:** Defaults to checked. **Bid responses** cannot be changed unless this box is checked when the event is created.

Define Event Basics (continued)

The **Event Settings and Options** link provides for the following options to be set as needed (continued):

- **Round\Version Display:** Defaults to **Display Round and Version -** Do <u>not</u> change.

- **Sealed Event:** Defaults to checked. Deselect, if applicable.

- **Display Bid Factor Weightings:** Buyers may add bid and weighting factors to help determine the award. *This is not the usual.* Generally used for the Request for Proposal (RFP) or Two-Step bid.

Define Event Basics (continued)

Additional fields on the **Events Settings and Options** page include:

- **Factor Event Score Into:** Defaults to **Total Score.**

- **Header** or **Line Factor Weighting**: Defaults to **blank**.

- **Start Price**: Defaults to **Do Not Display**.

After updates are made, **Return to Event Overview** to return to the **Event Summary** page.

Define Event Basics (continued)

Under **Step 1: Define Event Basics**, click the **Event Comments and Attachments** hyperlink.

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.

| Save Event | Save As Template |
| Post Event | |

Define Event Basics (continued)

Comments and attachments may be added to the event using the **Event Header Comments and Attachments** page. For a detailed listing of the file extensions that are allowed as attachments in Cardinal, see the appendix section of this course.

The **Enter Comments** section permits adding notes about the event. This section may be used to enter specifications, as well as cut and paste information from other documents. The **Standard Comments** hyperlink permits choosing predefined comments to add to the event.

- Click the **+ / -** to add or delete **Comments**.

- Check **Send to Bidder** or **Include on Award** to have a specific comment included on the award.

- Add attachments to the event by clicking the **Add Attachment** button. For a detailed listing of the file extensions that are allowed as attachments in Cardinal, see the appendix section of this course.

- Click **OK**.

Define Event Basics (continued)

The system is preconfigured with terms and conditions (comments) specific to Request for Proposals Terms (**RFP**), Information Technology Terms (**ITT**), and Solicitation/IFBs Terms (**SOL**). To select a preloaded comment, choose the **Std Type** field based on the type of event, i.e. **RFP**, **ITT**, or **SOL**, being created. The **Comment ID** field is populated based on the **Std Type** selected. Select the **Comment ID** which contains the terms and conditions verbiage related to the type event being created. The **Comments** box will populate based on the **Comment ID** selected.

RFP Example:

Std Type = **RFP**

Comment IDs have been filtered so that only those related to terms and conditions for RFPs will appear.

Select a valid value of **AWSR**.

Click **OK**.

Define Event Basics (continued)

After returning to the **Event Summary** page, under **Step 1: Define Event Basics**, click the **Payment Terms and Contact Info** hyperlink to open the **Event Contacts Details** page.

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.

| Save Event | Save As Template |
| Post | Preview PDF |

Define Event Basics (continued)

In the **Payment & Currency Information** section of the **Event Contact Details** page, **Bill Addrs** defaults, and in the **Event Contact** section the user **Contact Name**, **Email ID**, and **Phone** defaults. These fields can be modified.

Click the **Return to Event Overview** hyperlink to return to the **Event Summary** page and move on to **Step 2, Configure Line Items.**

Configure Line Items

From the **Event Summary** page, under **Step 2: Configure Line items**, click the **Line Items** hyperlink.

Configure Line Items (continued)

On the **Line Items** page, using the **Basic Definition** tab, configure a line item with the following:

- **Item ID**

- **Description**

- **Category**

- **UOM** (Unit of measure)

- **Qty** (Quantity)

- **Start Price**

- **Ext Amount**

- **Weighting** (not used)

Configure Line Items (continued)

Basic Definition tab:

Add a line item using the **Item ID** or **Category** lookup, or by copying from another transaction:

- **Item ID:** Click the **Look up** icon and select the item. Once selected, details for that item are displayed and include **Description**, **Category**, **UOM**, and **Start Price**. **Description, Category**, and **UOM** are fixed and cannot be changed. **Qty** must be entered.

- **Category:** When selecting by **Category**, a **Description**, **UOM, Qty**, and **Start Price** must be entered.

- **Copy From:** Copy line information from a Contract, PO, Request for Information, Requisition, Sourcing Event, Sourcing Template, etc.

Configure Line Items (continued)

Click on the **Advanced Definition** tab to further define lines.

The **Filtered View** changes the view on this page, by selecting **All Lines and Groups**, **Only Groups**, or **Only Lines**.

Configure Line Items (continued)

On the **Line Items** page, using the **Advanced Definition** tab, configure a line item with the following sequence.

- Click on the **Details** hyperlink to access the **Line Details**.

Configure Line Items (continued)

The **Line Details** page displays.

- Add **Shipping Information; Due Date** and **Ship To** location. **IMPORTANT** - The **Ship To is a required field** and **only 1 Ship To location is permitted.** The event can not be saved without the Ship To field being completed.

Once all data is entered, click the **Return to Event Lines Page** hyperlink to return to the **Line Items** page.

Configure Line Items (continued)

On the **Line Items** page, using the **Advanced Definition** tab, configure a line item with the following:

- **Line Comments** and **Attachments** icon: Add comments and upload attachments. For a detailed listing of the file extensions that are allowed as attachments in Cardinal, see the appendix section of this course.

- Squiggly lines inside the **Line Comments** and **Attachments** icon indicates comments or attachments have been added to the line.

- Flag your comment to be sent to the Bidder and/or included on the award.

- After comments have been entered, click **OK** to return to the **Line Items** page.

- From the **Line Items** page, click **Return to Event Overview**.

Configure Line Items (continued)

On the **Line Items** page, using the either **Basic Definition** or **Advanced Definition** tab, configure a line item with the following:

During event creation, users can select lines that they want to group to attempt to get better pricing through a bundled price quote.

- **Add Selected Lines to Group:** To award specific lines by group, simply select the checkbox for the lines to be grouped.

- Enter the details and click **OK** and **Return to Event Overview**.

Select Bidders/Offerors to Invite

Next, under **Step 3: Select Bidders to Invite**, click on the **Bidder Invitations** hyperlink.

Modify an Event

Event Summary

Business Unit 50100   Event ID 0000153663   Round 1   Version 1   Event Format Buy

Event Type RFx   Change to Auction   Time Zone EST

Event Status Open

*Solicitation Type : [IFB Sealed Contract ▼]   Preview Date 01/20/2017 🗓 Time 1:08PM

*Event Name [RFP Sample]   Start Date 02/03/2017 🗓 Time 1:08PM

Description [RFP Sample Description]   End Date 02/13/2017 🗓 Time 1:08PM

                                                     Copy From [Purchase Order ▼] [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

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

* Bidder Invitations

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Select Bidders/Offerors to Invite (continued)

State procurement guidelines require that all events be open to the public.

On the **Invite Bidders** page, select the **Public Event** checkbox to open the event to the public.

Click **Save Event Changes.**

Invite Collaborators

Collaborators are individuals who are asked by the Strategic Sourcing Buyer to provide some type of expertise and/or comments during the Strategic Sourcing process. It is possible to route an event to other users (Collaborators) for input.

After returning to the **Event Summary** page, under **Step 4: Invite Collaborators**, click on the **Event Collaborators** hyperlink to go to the event **Invite Collaborators** page. This is optional.

For more detailed information about **Collaboration**, see the job aid entitled **501 PR345: Strategic Sourcing Collaboration** located on the Cardinal website in **Job Aids** under **Learning**.

Invite Collaborators (continued)

Events do not route to managers, or other users, unless they are selected as a Collaborator.   A routing sequence is established inviting Collaborators. Modify the sequence to ensure the event is reviewed by the Collaborators in the order desired.

When adding Collaborators, a link to the event routes to their worklist. The user, as the originator of the event, will receive a message when all collaboration is complete.

Once all the details have been set and Collaborators added, click **OK** and then **Save Event** to return to the **Event Summary** page.

Post an Event for Bidding

Once the event creation steps are complete, be sure to click **Save Event**. The next step is to **Post** the event for bidding.

- Prior to posting the event, click **Preview PDF** to send an e-mail to the Buyer with a detailed PDF event summary. The PDF is available for view or print, as necessary.

- Click **Post** to post the event for bidding.

- Data is now sent to eVA from Cardinal. See VDOT's e-bidding process.

- The **Preview PDF** and **Post** buttons are no longer available.

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

Message

This will submit the Event for Approval. (18058,207)

Once the event is approved and posted you will be limited to the changes that you can make to the event. Click OK to continue or Cancel if you are not done making changes to the event.

OK   Cancel

Message

Do you want to create preview Event PDF and send it to ? (18058,1925)

Select Yes to create the file or No to return to the Event.

Yes   No

Save Event

Post

Save As Template

Preview PDF

Post an Event for Bidding (continued)

The **Event Details** PDF document that is sent to the Buyer is detailed below. This document may be included with the information sent to eVA to be posted on Virginia's eProcurement Portal.

Event Details

Commonwealth of Virginia
Department of Transportation

Event ID	Format	Type	Page
50100-0000150219	Buy	IFB Sealed Contract	1
Event Round	**Version**		
1	1		
Event Name			
MJH TEST001			
Start Date/Time		**Close Date/Time**	
10/17/2011 16:58:00 EDT		10/18/2011 15:58:00 EDT	

Event Currency: US Dollar
Bids allowed in other currency: No

Bidder: **General Public**

Submit To: VA Dept of Transportation
VDOT Central Office
1201 E Broad St
Richmond VA 23219
United States

Contact: Super User PR
Phone:
Email:

Event Description
I. PURPOSE:

The Virginia Department of Transportation (herein referred to as "VDOT") is soliciting bids from interested firms to provide

PERIOD OF CONTRACT: From_____ through _____(renewable)

The IFB must state either "from date of award," or specified date to a specified ending date, or delivery of goods or services.
If it will be a renewable term contract, put the word "renewable" in parenthesis after the "through" date if the contract contains a renewal clause. This will let potential bidders know right away if you anticipate the contract to go beyond the initial period. This is also restated under the Special Terms and Conditions under the Term of Contract clause.
See the example IFB provided.

II. QUESTIONS REGARDING THIS INVITATION FOR BID:

Any questions regarding this invitation for bid shall be addressed to Mr./Ms. Contract Officers Name at (804) 000-0000. The issuing office shall determine whether any addendum should be issued as a result of any questions or other matters raised.

Lesson 2: Summary

| 2 | Employee Self-Service Overview |

In this lesson, you learned:

- Copying from another document provides a shortcut that eliminates some duplicate entry. You can create an event by copying from a:

  - Requisition

  - Event

  - Contract

  - PO

- There are five steps to creating a new Strategic Sourcing Event:

  - Define Event Basics

  - Configure Line Items

  - Select Bidders to Invite (Public Event)

  - Invite Collaborators (optional)

  - Post Event

Lesson 3: Introduction

3	Maintain Events

This lesson covers the following topics:

- Using the Event Workbench

- Change an Event - Versions

Using the Event Workbench

The **Event Workbench** is used to view and manage events, as well as create new versions (addendums). Using the **Event Workbench**, the Strategic Sourcing Buyer can also cancel an event.

Navigate to the **Event Workbench** page using the following path:

Main Menu > Sourcing > Maintain Events > Event Workbench

Using the Event Workbench (continued)

The **Event Workbench** page has three sections: **Search Criteria**, **Legend**, and **Search Results**.

The **Search Criteria** section allows searching for a specific event using any combination, or all, of the available fields. The criteria helps to narrow the search results.

Using the Event Workbench (continued)

The **Legend** section of the **Event Workbench** page can be expanded to see descriptions for each of the icons used in the **Search Results**.

Using the Event Workbench (continued)

Event Workbench Legend explanation of icons

Legend							
⏸ Pause	▶ Resume	⊗ Cancel	📋 Approval Status	📖 Event History	🔍 Analyze Bids	📢 Notice of Intent to Award	✉ Notice of Award
✏ Edit Event	📄 New Version	👪 View Collaboration	🔓 Collaboration Available	🔒 Collaboration Checked Out	📜 Bid History	⚠ Notify Me On Check-In	📑 View Award Details

Icon	Description
⏸	**Pause:** Not used
▶	**Resume:** Not used
⊗	**Cancel:** Cancel the event. This cannot be undone.
📋	**Approval Status:** Determine whether event is approved
📖	**Event History:** View the event's Version History. Stage and Status
🔍	**Analyze Bids:** View the Status and bids for the event
📢	**Notice of Intent to Award:** View the details of the NOIA
✉	**Notice of Award:** View the details of the NOA
✏	**Edit Event:** Edit the version of the selected event
📄	**New Version:** Create a new version of the selected event
👪	**View Collaboration:** View collaboration input for the event
🔓	**Collaboration Available:** Add recommendations
🔒	**Collaboration Checked Out:** Request notification when event is checked out for collaboration
📜	**Bid History:** View the bid/proposal invitation status
⚠	**Notify Me on Check-In:** Request notification when event is checked in after collaboration comments are added
📑	**View Award Details:** Displays Award details to user

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Using the Event Workbench (continued)

The **Search Results** section of the **Event Workbench** lists all events matching the search criteria. Click the arrow on the left side of the line to display the line items for the selected event. Click on the **Event ID** hyperlink to open the **Modify an Event – Event Summary** page. This is the same page where the initial five create event steps were configured. From this page, the event details can be viewed.

Change an Event: Versions

Event version control is used to track changes (addendums) made to a posted event.

Use the **Event Workbench** to create and edit versions. When viewing a multiversion event, the system always displays the most recent version of the event. When creating a new event version, the version number increments by one. When posting the new version, the previous version becomes read-only.

To create a new version, click the **New Version** icon on the **Event Workbench**.

Change an Event: Versions (continued)

After selecting the **Create a New Version** icon, a pop-up message appears to confirm creation of a new version. Select **Yes** to create the new version. The **Event Summary** page will be displayed.

Message

Create New Version? (18058,8129)

This operation will create a new version of the event. The current active version will not be inactivated until the new version has been posted. Select 'Yes' if you wish to create a new version for this event. Otherwise, select 'No'.

[Yes]   [No]
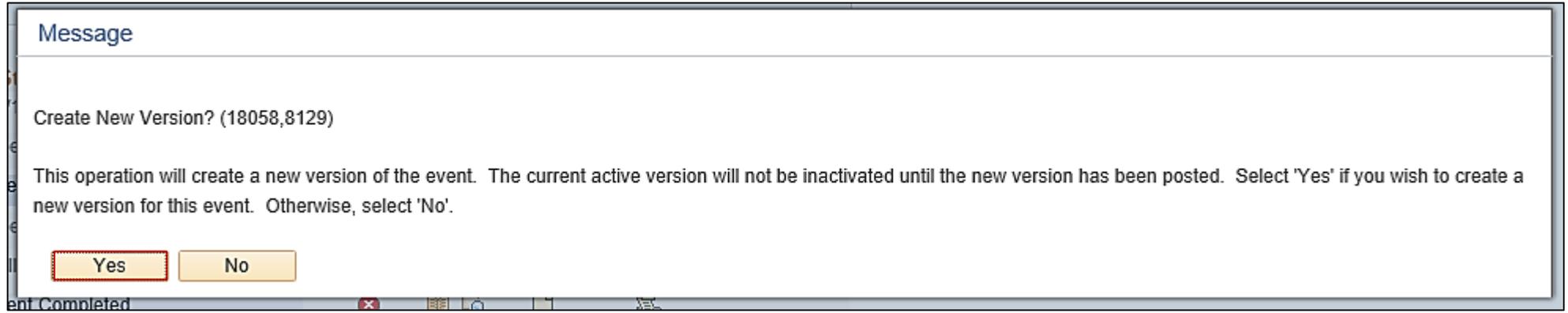
Change an Event: Versions (continued)

Once modification has been completed, be sure to click the **Save Event** and **Post** buttons. Click **OK** on the pop-up message and the new version is automatically approved. Once the new version is posted, the previous version will be inactivated and the **Post** button will be grayed out. Note: Whenever a version is Posted it is sent to eVA.

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

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

* 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.

Save Event

Save As Template

Post

Preview PDF

Message

This will submit the Event for Approval. (18058,207)

Once the event is approved and posted you will be limited to the changes that you can make to the event. Click OK to continue or Cancel if you are not done making changes to the event.

OK   Cancel

Lesson 3: Summary

3	Maintain Events

In this lesson, you learned:

- The Event Workbench page is used to maintain events.

- Multiversion events are created using the Event Workbench when you make changes (addendums) to a posted event.

Lesson 4: Introduction

4	Analyze Bids/Proposals and Awarding Events

This lesson covers the following topics:

- Analyze Bid/Proposal Responses

- Collaborate on Bid/Proposal Responses (optional)

- Award the Event (By Line, Group, or Grand Total)

- Create a Purchase Order/Contract

- Cancel a Purchase Order/Contract Associated to an Event

Analyze Bid/Proposal Responses

Use the Event Workbench to review the bids. Bidders submit bid responses into eVA. Once the event end date has passed and all the bids have been uploaded from eVA, the **Analyze Event** pages are available. Simply click on the **Analyze** icon next to the event with bids to be reviewed. The **Analyze Total** page will display.

Navigate to the **Event Workbench** page using the following path:

Main Menu > Sourcing > Maintain Events > Event Workbench

Analyze Bid/Proposal Responses (continued)

From the **Analyze Total** page use the optional **Analyze Export** feature which allows, exporting bid/proposal data to a spreadsheet.

On the **Go To** box drop-down menu, select **…Analyze Export**. The **Bid Analysis Export** page will be displayed.

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

Analyze Total

Analyze Total   Analyze Line

Business Unit:	Event ID:	Round:	Version:		Event Name:	
50100	0000155539	1	1		Thermoplastic Pavement Marking Material	

Event Format:	Event Type:	Currency:	End Date:	Status:	Go To:
Buy	RFx	USD	07/30/2019 9:40AM EDT	Awarded	... ▾

▶ **Bid Analysis and Display Options** ⃝?

Analysis

...
...Analyze Export
Associate Planning Task
Award Events
Create New Round
Document Status Inquiry
Event Comments and Attachments
Invite Collaborators
Review Optimization

	CROWN TECHNOLOGY LLC	Ozark Materials LLC	Ennis-Flint Inc	
Bidder Name				
Event Version Responded To	1	1	1	
Bid Number	1 💬	1 💬	1 💬	
Total Bid Amount	132,300.00	123,420.00	122,540.00	
Total Bid Cost	132,300.00	123,420.00	122,540.00	116,700.00
Total Event Score	0.00	0.00	0.00	0.00
Total Header Cost	0.00	0.00	0.00	0.00
Total Header Score	0.00	0.00	0.00	0.00

Bid Action	NA ▾	NA ▾	NA ▾	Award ▾
Reject Reason	🔍	🔍	🔍	
Award by Percent				100.000
Hide Bid	☐	☐	☐	☐

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Analyze Bid/Proposal Responses (continued)

On the **Bid Analysis Export** page, you can select to email the report to yourself and/or other(s).

- Click the **+ / -** icon to add/delete email recipients.

- In the **Filter Bids** section, choose the bids to be included in the export file.

- Click **Create Analysis Export**.

The **Analyze Events** page will be saved, and a process will be kicked off to create the **Bid Analysis Export file** and email the selected recipients.

Once the export has been kicked off, click the **Return to Analyze Event** hyperlink to return back to the **Analyze Total** page.

Analyze Bid/Proposal Responses (continued)

Analyze Bid/Proposal Responses (continued)

The **Event Analysis** export report is delivered to each recipient's email. The example below shows four bidders at the bottom right with the **Bidder Name** and **Total Bid Amount**.

Analyze Bid/Proposal Responses (continued)

The **Event Analysis** below shows responses broken down by Bidder.

Event Analysis

PeopleSoft Strategic Sourcing

Event ID	Format	Type	Round	Version
50100-0000156030	Buy	RFx	1	4

Event Name
IFB# 156030 ROW MOWING & LITTER PICK UP SERVICES

Start Time	Finish Time
04/16/2020 09:00 AM EST	05/05/2020 04:05 PM EST

Report Date: 05/14/2020 11:58 AM EST
Event Currency: US Dollar
Bids Allowed in Other Currency: No
Factor General Score into Line Score: No

Included Bids: All
Highlight Delta Response: No

Bidder Name	American General Contractors	Quick Cleaning Systems	Meador Farms Inc	BUSHWHACKERS INC
Event Version:	4	4	4	4
Bid Number:	1	1	1	1

Line Details

Line: 1	Item ID:9883653710	Line Quantity: 10	Weighting:	7.14%
Bid Required: No	Reserve Price: No			

Description: MOWING SERVICES, RIGHT OF WAY, PER VADOT SPECIFICATIONS RIGHT OF WAY, INTERSTATE, NON-TRACTOR

	American General Contractors	Quick Cleaning Systems	Meador Farms Inc	BUSHWHACKERS INC
Line Bid Quantity:	10	10	10	10
Total Line Bid Amount:	4500	0	0	0
Total Line Score:	100	0	0	0

Comments
- Non-Tractor Mow Interstate 195 in the City of Richmond

Price Details	Worst	Weighting
What is your bid price?	300	100.00%

	American General Contractors	Quick Cleaning Systems	Meador Farms Inc	BUSHWHACKERS INC
Unit Bid Price:	450	0	0	0
Score:	100	0	0	0

Quantity Details	Requested
Minimum Quantity:	0
Unit of Measure:	ACR

	American General Contractors	Quick Cleaning Systems	Meador Farms Inc	BUSHWHACKERS INC
Minimum Quantity:	0	0	0	0
Bid Unit of Measure:	ACR	ACR	ACR	ACR
Conversion Rate:	N/A	N/A	N/A	N/A
Award By Percent				
Award Quantity				

Analyze Bid/Proposal Responses (continued)

The User can also review bidder information by running the Bid Tab Report.

Navigation: **Main Menu>Sourcing>Reports>Event Bid Tab**

Analyze Bid/Proposal Responses (continued)

Commonwealth of Virginia
Department of Transportation
BID TABULATION REPORT

Report ID: VRPR008

Run Date: 4/14/2017
Run Time: 14:23 PM

Business Unit:	50100						
Event ID:	0000150024						

Page 1 of 7

Buyer:	RONIQUE.DAY		Closing Date:	01/04/2012			
			Closing Time:	3:45:00 PM			

Supplier ID	Supplier	SWAM Type	Group / Line# / Item	Item Description	Quantity	Unit Price	Extended Price	Awarded
Line Type: L								
0000012056	Blake Crosby		1- 9684431314	GRAFFITI REMOVAL SERVICES POWER WASHING OVER 100 SQ. FT	4500.00	$25.00	$112,500.00	
			2- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.00	$25.00	$112,500.00	
			3- 9684431260	GRAFFITI REMOVAL SERVICES MOBILIZATION, GRAFFITI REMOVAL SERVICES	1.00	$500.00	$500.00	
			4- 9684431314	GRAFFITI REMOVAL SERVICES POWER WASHING OVER 100 SQ. FT	4500.00	$25.00	$112,500.00	
			5- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.00	$25.00	$112,500.00	
			6- 9684431260	GRAFFITI REMOVAL SERVICES MOBILIZATION, GRAFFITI REMOVAL SERVICES	1.00	$500.00	$500.00	
			7- 9684431314	GRAFFITI REMOVAL SERVICES POWER WASHING OVER 100 SQ. FT	4500.00	$25.00	$112,500.00	
			8- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.00	$25.00	$112,500.00	
			9- 9684431260	GRAFFITI REMOVAL SERVICES MOBILIZATION, GRAFFITI REMOVAL SERVICES	1.00	$500.00	$500.00	
			10- 9684431314	GRAFFITI REMOVAL SERVICES POWER WASHING OVER 100 SQ. FT	4500.00	$25.00	$112,500.00	
			11- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.00	$25.00	$112,500.00	
			12- 9684431260	GRAFFITI REMOVAL SERVICES MOBILIZATION, GRAFFITI REMOVAL SERVICES	1.00	$500.00	$500.00	
			13- 9684431314	GRAFFITI REMOVAL SERVICES POWER WASHING OVER 100 SQ. FT	4500.00	$25.00	$112,500.00	
			14- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.00	$25.00	$112,500.00	
			15- 9684431260	GRAFFITI REMOVAL SERVICES MOBILIZATION, GRAFFITI REMOVAL SERVICES	1.00	$500.00	$500.00	

Collaborate on Bid/Proposal Responses

Use the optional **Invite Collaborators** feature to send bid/proposal responses to specific collaborators' worklists for view and comment. Invite any users with the role of Event Collaborator to contribute to event creation or analysis. During bid analysis, Collaborators can manually score text-based bid factors (i.e. a question requiring a text answer), enter responses to hidden bid factors, and change bid factor weightings. The system calculates an average score across all collaborators.

Navigate to the **Event Collaboration Details** page using the following path:

Main Menu > Sourcing > Maintain Events > Analyze Events

- Enter the event search criteria.

- Select the event for collaboration. The **Analyze Total** page will display.

- Click on the **Go To** box drop-down arrow and select **Invite Collaborators**. The **Event Collaboration Details** page will be displayed.

Collaborate on Bid/Proposal Responses (continued)

Using the **Event Collaboration Details** page, set the **Collaboration Due Date**, the collaborators, and the **Routing Sequence** the collaborators will use to review the event. Add or subtract collaborators using the **+ / -** icons.

The Buyer may also invite other collaborators. While collaborators are analyzing the event, Cardinal sets the event status to **Collaborating Bid Analysis**.

For more detailed information about **Collaboration**, see the job aid entitled **501 PR345: Strategic Sourcing Collaboration** located on the Cardinal website in **Job Aids** under **Learning**.

Award the Event

Once bids have been analyzed and a selection made, Awards can be made by line, group, or total.

Award bids by:

- Line: use to award different lines to different suppliers

- Group: if specific line items were configured into groups that are to be awarded based on location, similar items, etc. in the **Configure Line Items** portion of the event

- Total: use to award the entire bid/proposal to one bidder

Award the Event: By Line

Each line is separately considered and awarded on the **Analyze Line** page. Navigate to this page using the following path:

Main Menu > Sourcing > Maintain Events > Analyze Events

Search and select the event. The **Analyze Total** page will display. Click on the **Analyze Line** hyperlink. Next, click on the **Analyze** hyperlink next to the **Line** to be awarded. The **Analyze Line** page will display and details the extended bid response.

Award the Event: By Line (continued)

Expand the **Factors** section to view the per unit price bid for each Bidder. Make the award selection using the **Bid Action** drop-down. The award can also be split, by quantity or percent, between different Bidders. When finished, click **OK**.

Award the Event: By Line (continued)

Repeat the award steps for each line. Once the event awards are complete for each line, click **Save**. Navigate to the **Award Details** page using the **Go To** drop-down box, select **Award Events**.

Award the Event: By Line (continued)

Make the award to the PO or contract using the **Award Type** drop-down box. Click on the right and left arrows to scroll through the **Award Details** to review and update the **Award Type** for each bidder. The **PO Business Unit** and payment **Terms** must also be updated. When complete, click **Post Award**.

Award the Event: By Group (Lot)

If Lines are grouped on the event (Lot), they must be bid on and awarded by Lot. Awards by group/lot are done on the **Analyze Group** page.

Navigate to this page using the following path :

Main Menu > Sourcing > Maintain Events Analyze Events

- Search and select the event. The **Analyze Total** page will display.

- Click on the **Analyze Group** hyperlink.

- Click on the **Analyze** hyperlink next to each **Group ID/Lot** to be awarded. Another **Analyze Group** page will display and details the extended bid response.

Award the Event: By Grand Total

Bids are considered and awarded based on the sum of all line items (grand total). Cardinal retains all bid/proposal responses, including those that do not result in an award.

Analyze Total

Analyze Total   Analyze Line   Analyze Group

Business Unit:	Event ID:	Round:	Version:		Event Name:	
50100	0000153663	1	6		RFP Sample	
Event Format:	Event Type:	Currency:	End Date:		Status:	Go To:
Buy	RFx	USD	01/23/2017 1:08PM EST		Pending Award	--- ▾

▸ Bid Analysis and Display Options (?)

Analysis

	In & Out Total Building Maintenance LL	Commercial & Construction Cleaning Inc	A Services Group LLC
Bidder Name			
Event Version Responded To	5	5	5
Bid Number	1	1	1
Total Bid Amount	1,583.00	1,285.00	1,200.00
Total Bid Cost	0.00	0.00	0.00
Total Event Score	0.00	0.00	0.00
Total Header Cost	0.00	0.00	0.00
Total Header Score	0.00	0.00	0.00
Bid Action	Award ▾	Award ▾	Award ▾
Reject Reason		Q	Q
Award by Percent			
Hide Bid	☐	☐	☐

▸ Factors

| Recalculate | Add / Edit Factors | Unhide Bids | | << | < | > | >> |

💾 Save   🔎 Return to Search

Analyze Total | Analyze Line | Analyze Group

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Award the Event: Post the Award

Once the award determination has been made, use the **Award Details** page to award the event.

Access the **Award Details** page from the **Analyze Total** or **Analyze Line** page using the drop-down **Go To:** menu and selecting **Award Events**.

Or navigate to the **Award Details** page using the following path:

Main Menu > Sourcing > Maintain Events > Award Events

Award the Event: Post the Award (continued)

From the **Award Details** page, perform the following:

- Select the **Award Type** of **Purchase Order** or **PO Contract**.

- Ensure the **Supp/Item Rel** checkbox is checked. This will associate the item with the supplier for future use.

- Click **Post Award**.

eVA and agency procurement standards/requirements will apply.

Create a Purchase Order/Contract: Award to Purchase Order

If the event is for a one time or spot purchase, the event is generally awarded to a PO. The **PO Business Unit**, **Line**(s), and schedule information usually default from the sourcing event. Confirm accuracy of the information.

Select the **Award Type** value of **Purchase Order**.

For more detailed information about awarding to a purchase order, see the course entitled **501 PR344: Processing Purchase Orders** located on the Cardinal website in **Course Materials** under **Learning**.

Create a Purchase Order/Contract: Award to Purchase Order (continued)

Create a Purchase Order/Contract: Award to Purchase Order (continued)

Once **Purchase Order** is selected as the **Award Type** and click **Post Award**, the **Express Purchase Order** page displays.

The **Express Purchase Order** page is similar to the regular **Purchase Order** page.

When reviewing the page, take note of these items in particular:

- The **PO Status** of the PO is **Open** upon award and will change to **Approved** when the check mark is clicked.

- Use the **PO Defaults** hyperlink to modify or add the accounting distributions.

- Additional hyperlinks are also available and provide more details.

- Clicking the arrow to the left of the line to review the schedule details for a line.

Once updated, the PO is complete and dispatched by the Buyer.

Create a Purchase Order/Contract: Award to Purchase Order (continued)

Create a Purchase Order/Contract: Award to Contract

When an event is to be awarded to a contract, select the **Award Type** value of **PO Contract**.

For more detailed information about awarding and setting up contracts, see the course entitled **501 PR348: Entering Procurement Contracts** located on the Cardinal website in **Course Materials** under **Learning**.

Create a Purchase Order/Contract: Award to Contract (continued)

Cancel a Purchase Order/Contract Associated to an Event

After awarding an event to a PO or a contract, Cardinal retains links to the PO and contract.

If the PO or contract are attached to an event, a cancellation will trigger Cardinal to ask if the quantity is to be returned back into the Strategic Sourcing event again.

This happens when:

•   The PO or contract is cancelled

•   A PO or contract line is cancelled

•   A PO schedule is cancelled

•   Quantities associated with a line or schedule are reduced

If the response is yes, Cardinal puts the quantity back to the award, and the quantity either can be re-awarded to another Bidder/Offeror or manually closed it on the **Award Summary** page by setting the **Line Status** field to **Closed.**

Lesson 4: Summary

| 4 | Analyze Bids/Proposals and Awarding Events |

In this course, you learned:

- The **Analyze Total** page on the **Event Workbench** allows you to review bid/proposal responses.

- You have the option to invite others to collaborate on the bid/proposal responses.

- You can award by line, group, or grand total.

- After you have analyzed the bids/proposals responses and made your selection, you can award the winning bid/proposal to a PO or PO Contract

Lesson 5: Strategic Sourcing Hands-On Practice

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Course Summary

PR345 — Strategic Sourcing

In this course, you learned:

- Recognize key strategic sourcing concepts

- Create, modify, and manage Strategic Sourcing events in Cardinal

- Analyze bids/proposals

- Award events

- Understand how Strategic Sourcing integrates with other Cardinal modules and interfaces with external systems

- Understand how strategic sourcing interfaces with external systems

Course Evaluation

Congratulations! You successfully completed the **501 PR345: Strategic Sourcing** course.

Your instructor will provide instructions on how to access the evaluation survey for this course.

Appendix

- Key Terms

- Allowed Extensions on Attachments in Cardinal

- Event Status

- Diagrams and Screenshots

- Flowchart Key

Key Terms

- **Award**: An award is made to the winning Bidder/Offeror by a purchase order (PO) or a contract.

- **Bidder/Offeror**: The Bidder/Offeror is anyone who submits a bid/proposal on an event.

- **Bidder /Offeror Response**: A Bidder/Offeror Response is the response by a Bidder/Offeror to an event.

- **Bid Factor**: A bid factor is a weighted question about the Bidder's/Offeror's products, services, or company and may require a response by the Bidder/Offeror. Header bid factors relate to the overall event, whereas line bid factors relate only to the specific line.

- **Bids/Proposals**: Bids/proposals are submissions of an offer on an event.

- **Buy Event**: A Buy Event is the purchase of goods and/or services associated with a request for a price quote or proposal.

- **Event Format**: The event format is either Buy or Request For Information (RFI).

- **Event Types**: An event type may be an Invitation For Bid (IFB), Request For Proposal (RFP), or Request For Information (RFI).

Key Terms (continued)

- **IFB:** An Invitation For Bid (IFB) (competitive bidding) event type is the method by which bids for a specified good or service are solicited from Bidders/Offerors.

- **RFI:** A Request for Information (RFI) is a sourcing event type by which information about a good or service is solicited from Bidders/Offerors. It is more of an open inquiry seeking broad data and understanding.

- **RFP:** A Request For Proposal (RFP) (competitive negotiation) event type is the method by which proposals for a good or service are solicited from Bidders/Offerors.

- **RFx**: RFx is a catch-all term for event types such as Invitation For Bid (IFB), Request For Proposal (RFP), or Two-Step Bid.

- **Solicitation Type**: The Solicitation Type is the classification of an event, which defines the means of procurement. Values include Emergency, IFB Sealed, IFB Unsealed, Prof Services, Request for Response, Standard Contract, Small Purchase, Sole Source, Step Bidding, and Unsealed Contract.

- **Strategic Sourcing Event:** A Strategic Event is the process of soliciting quotes, bids/proposals, and/or offers to establish contracts and/or purchase orders.

- **Two-Step Bid:** A Two-Step Bid (competitive bidding) event type is the method by which an existing supplier is asked to provide a bid for a continued good or service based on an existing contract.

Allowed Extensions on Attachments in Cardinal

The following is a list of file extensions that are allowed on attachments uploaded to Cardinal. You should only attach key supporting documents that either enhance the electronic Cardinal transaction approval process or are instrumental as part of the transaction history. The Cardinal system should not be relied upon to maintain agency documentation and should not be considered the official retention source of the agency. Supporting documents, as required by all applicable regulatory/governing bodies, should be maintained by the agency apart from the Cardinal attachment functionality.

Allowed Extensions on Attachments in Cardinal		
.BMP	.CSV	.DOC
.DOCX	.JPE	.JPEG
.JPG	.MSG	.PDF
.PNG	.PST	.RTF
.TIF	.TIFF	.TXT
.XLS	.XLSX	.XML

Event Statuses

Status	Description	Bids Allowed
Open	Saved event, not posted, not routed for collaboration	No
Posted	Event is ready for bidding	Yes
Collaborating Event	Event routed for internal collaboration	No
Event Complete	Event ended but update event status process has not run	Yes
Pending Award	Event is complete, update event status process has run, has not been awarded	No
Collaborating Bid Analysis	Event has routed for bid analysis collaboration	No
Awarded	Event award has been approved, event is complete	No
Not Awarded	Event ended without being awarded	No
Cancelled	Event was cancelled, no award	No

Integration with Procurement and Accounts Payable

Strategic Sourcing integrates with other Cardinal modules in the following way:

- After an event is awarded, either a PO or contract is issued. These items integrate with future requisitions, POs, contracts, and PCards.
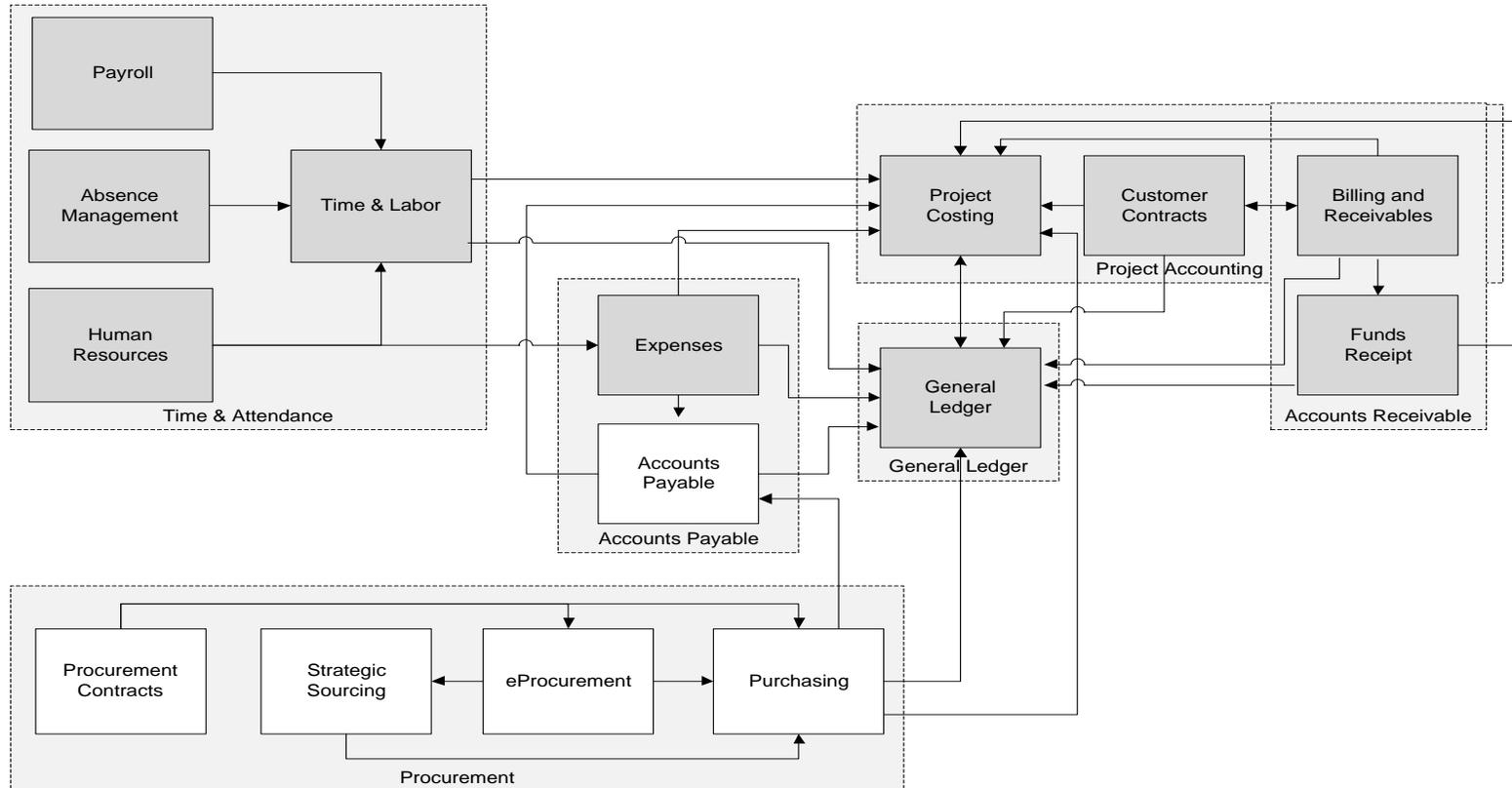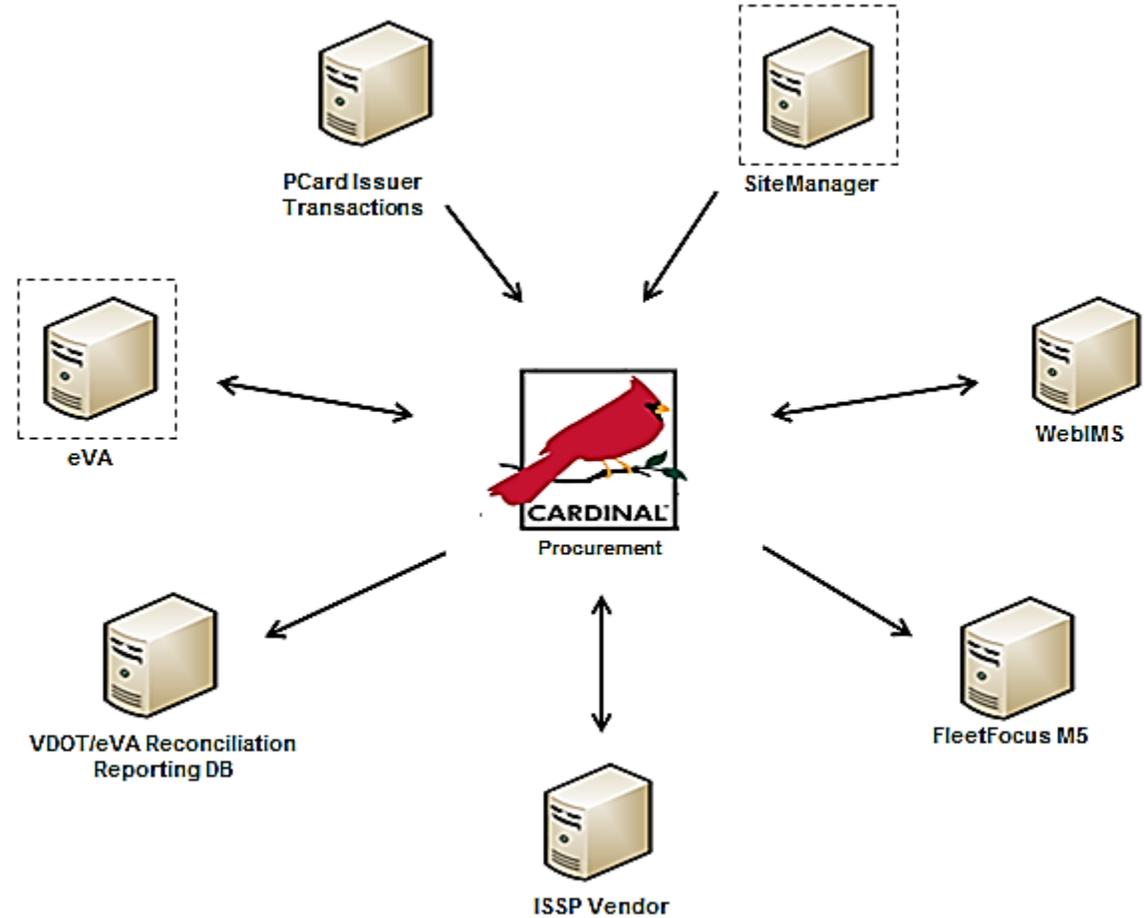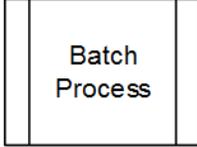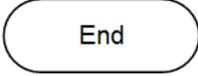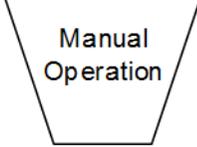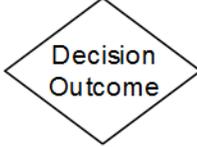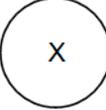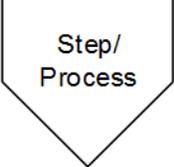
Interface with eVA

The Strategic Sourcing module also interfaces with an external system.

- Strategic Sourcing events are manually posted to

- All bidders must be registered in eVA.

- All eVA bidders (vendors) are interfaced into Card

Flowchart Key

Step Description	Depicts a process step or interface.
Batch Process	Specifies a batch process.
Manual Operation	Depicts a process step that is preformed manually.
Decision Outcome	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.
Entity Name	Represents an entity (person, organization, etc.).

Start	Indicates point at which the process begins. Does not represent any activity.
End	Indicates point at which the process ends. Does not represent any activity.
Document	Depicts a document of any kind, either electronic or hard copy.
X	Indicates an on-page or intra process connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page.
Step/ Process	Connects steps between business processes.

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