501 PR345: Strategic Sourcing

Instructor Led Training

Rev 5/14/2020

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 Training.

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

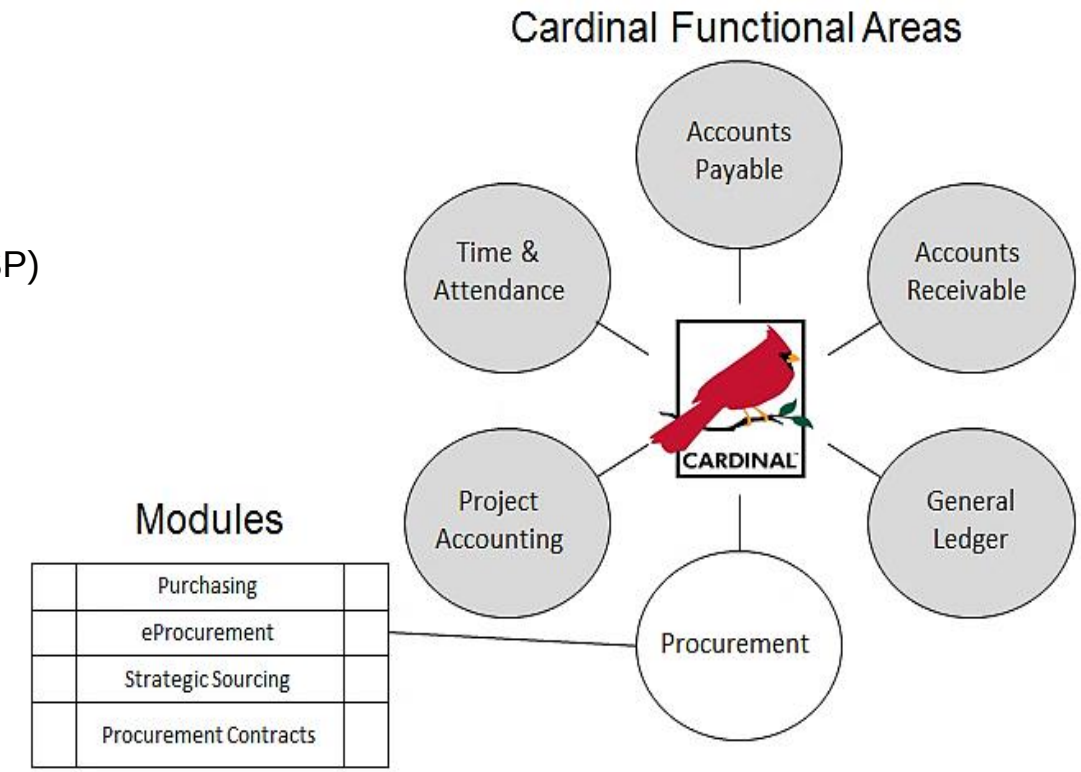
Like Purchasing, the eProcurement module provides for Procurement but is web-based. It is similar to an online shopping cart experience for users requesting goods and/or services.

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.



Strategic Sourcing Key Concepts

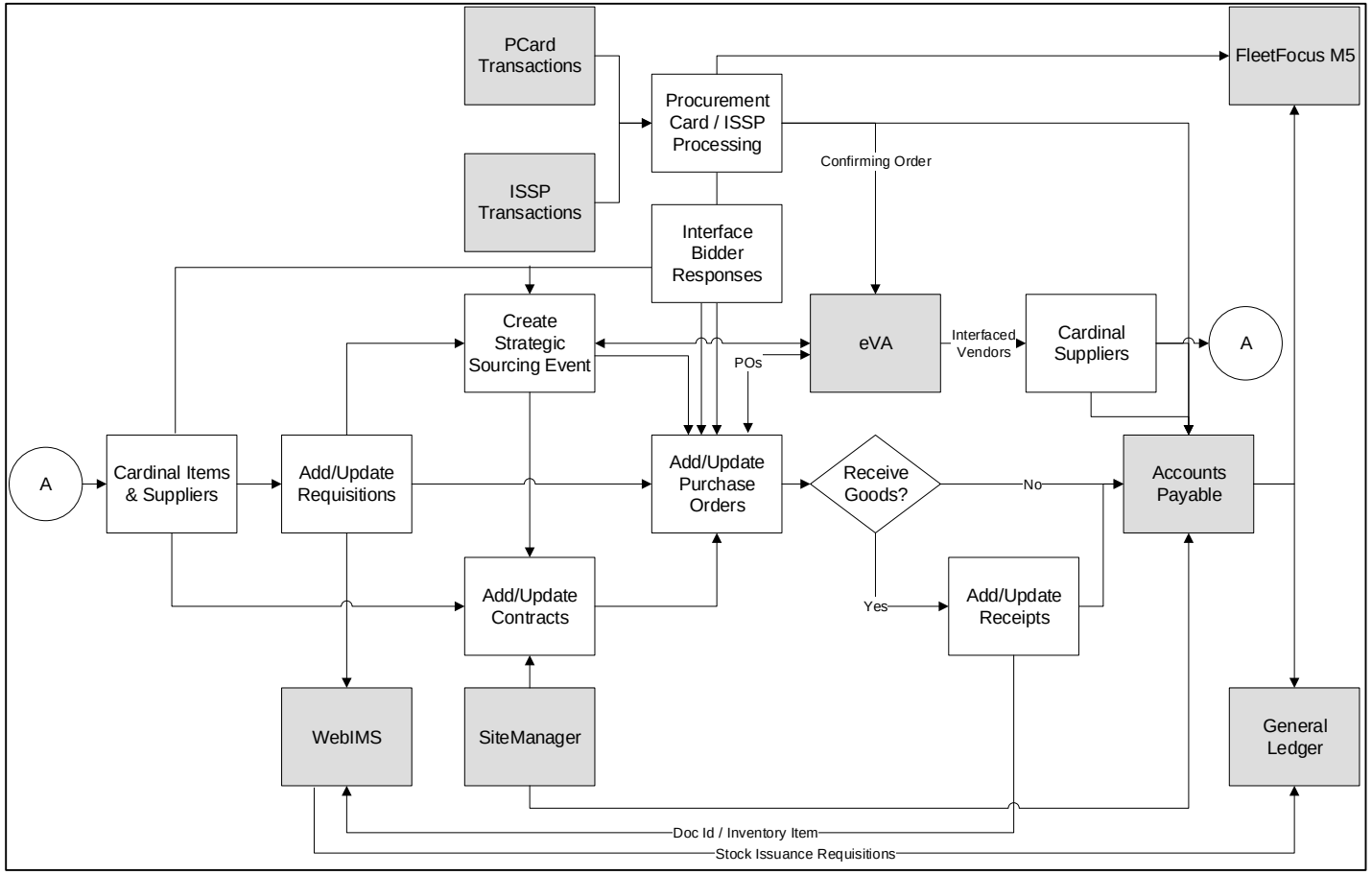
Key concepts include:

- 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.

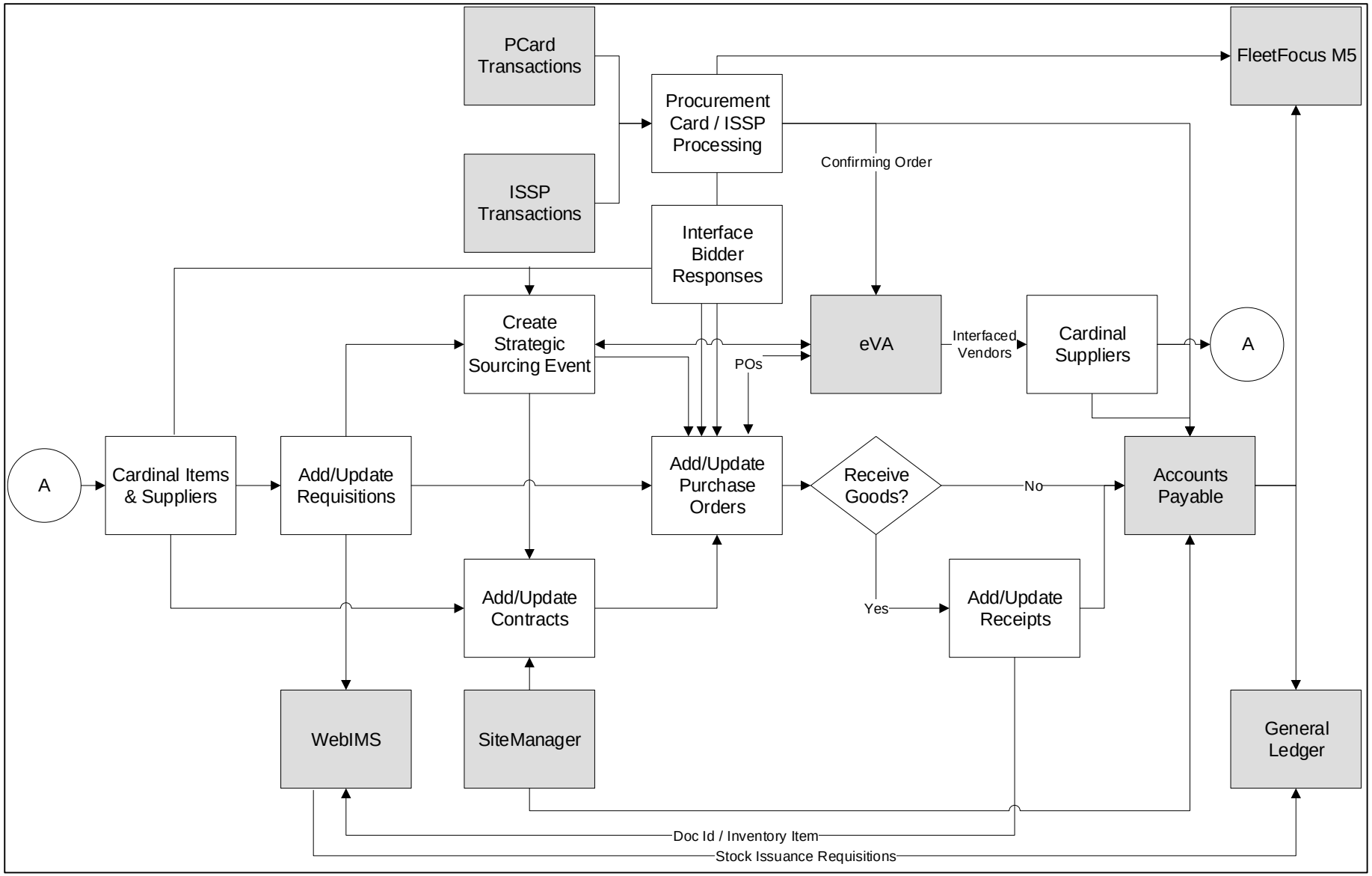
Procurement Process Overview

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)

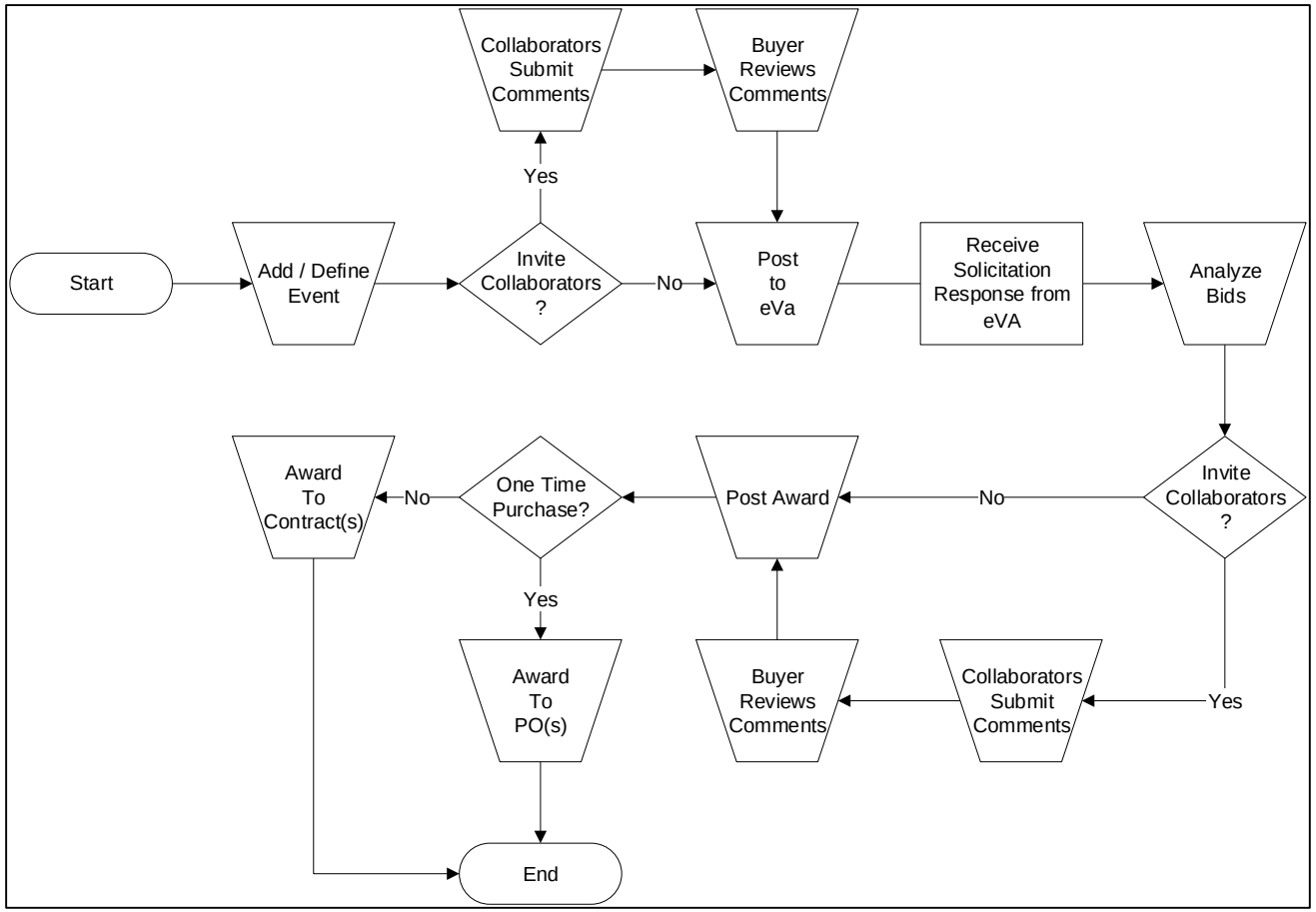


Strategic Sourcing Overview

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.

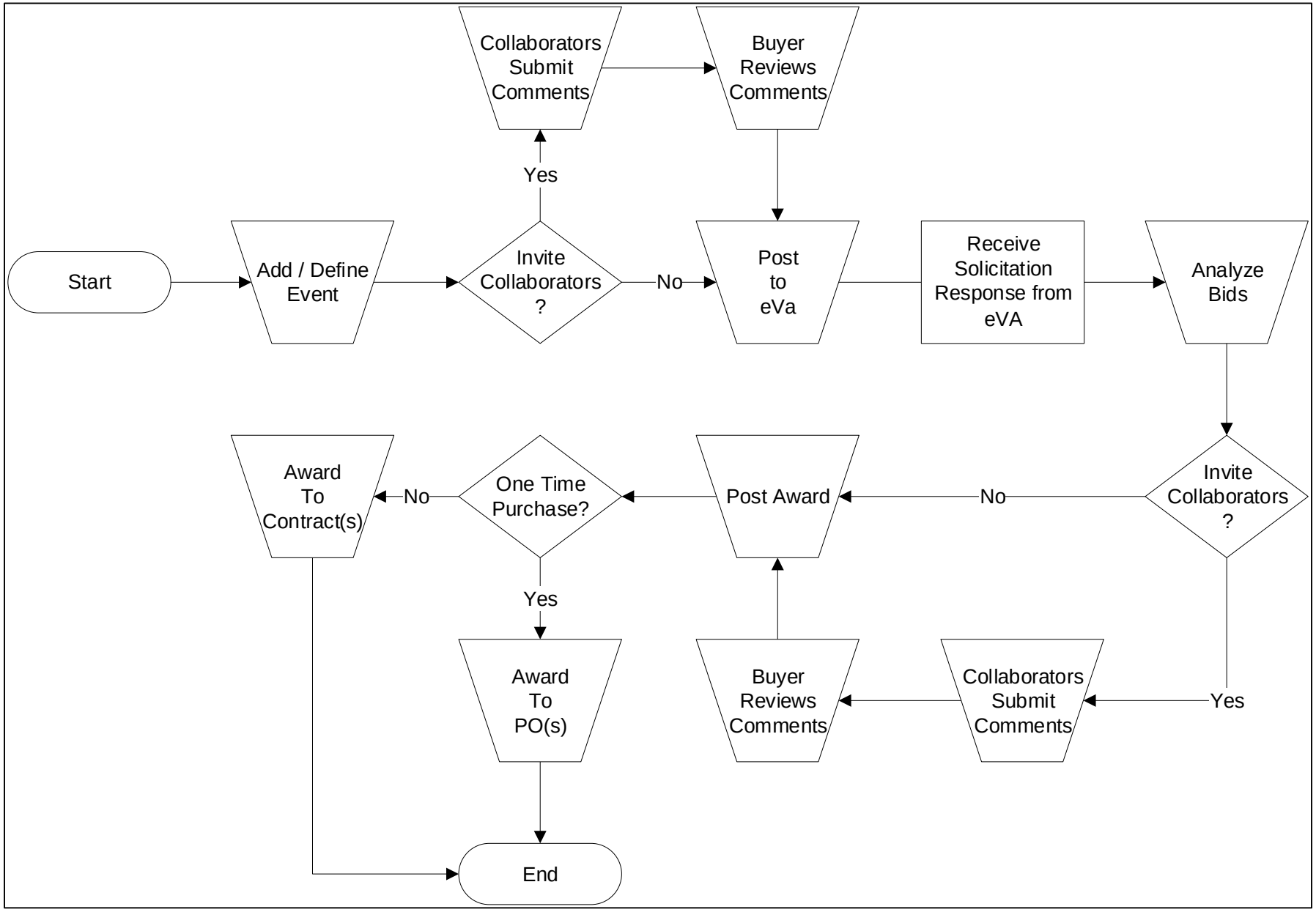
Strategic Sourcing involves several key steps:

- Add/Define Event
- Event Collaboration*
- Receive and Enter Solicitation Response(s)
- Analyze Bid Response(s)
- Response Collaboration*
- Post Award
- 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 **Training**.

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:

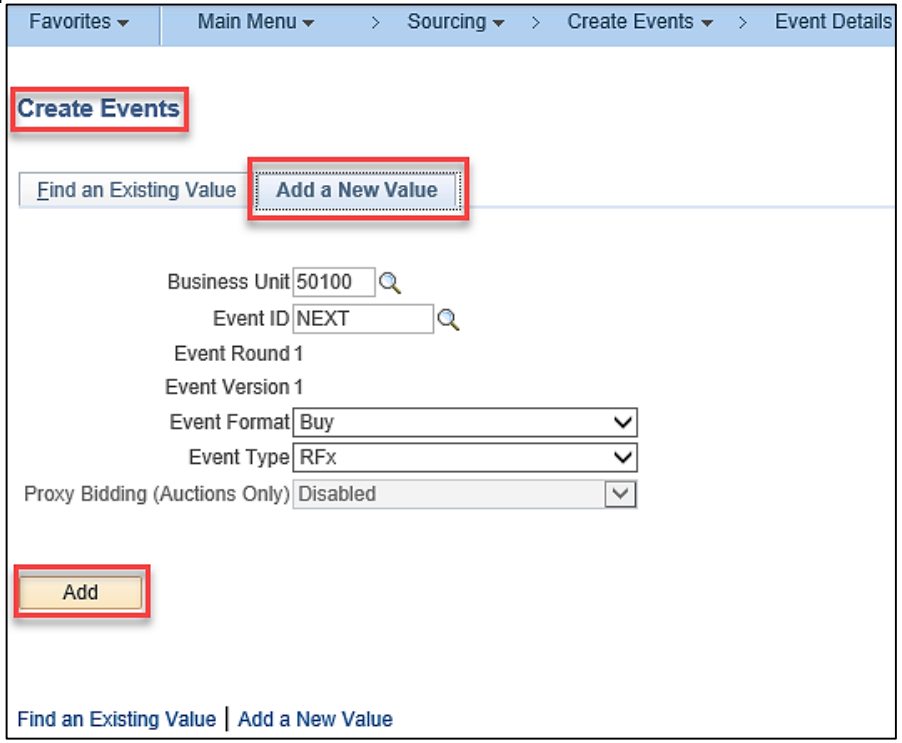
- Create Event (Ad Hoc or Copy)
- Define Event Basics
- Configure Line Items
- Invite Collaborators
- Post an Event for Bidding

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**.

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.

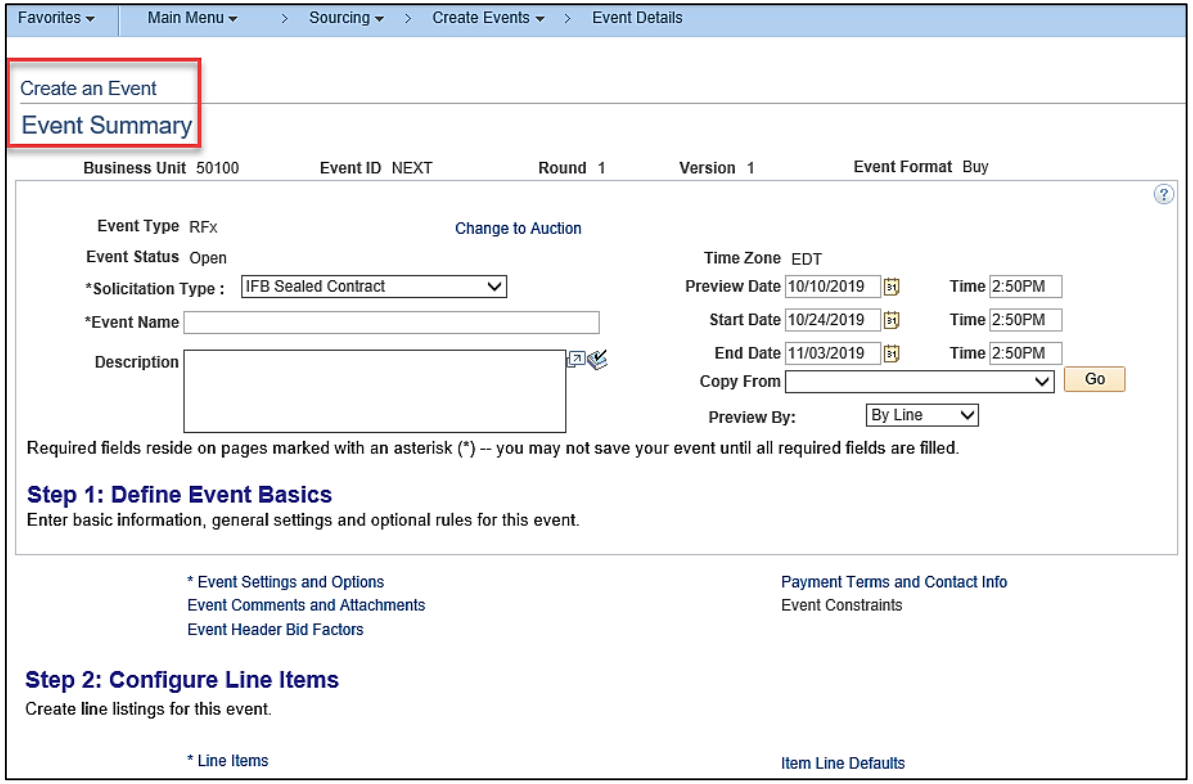
Create Events (continued)

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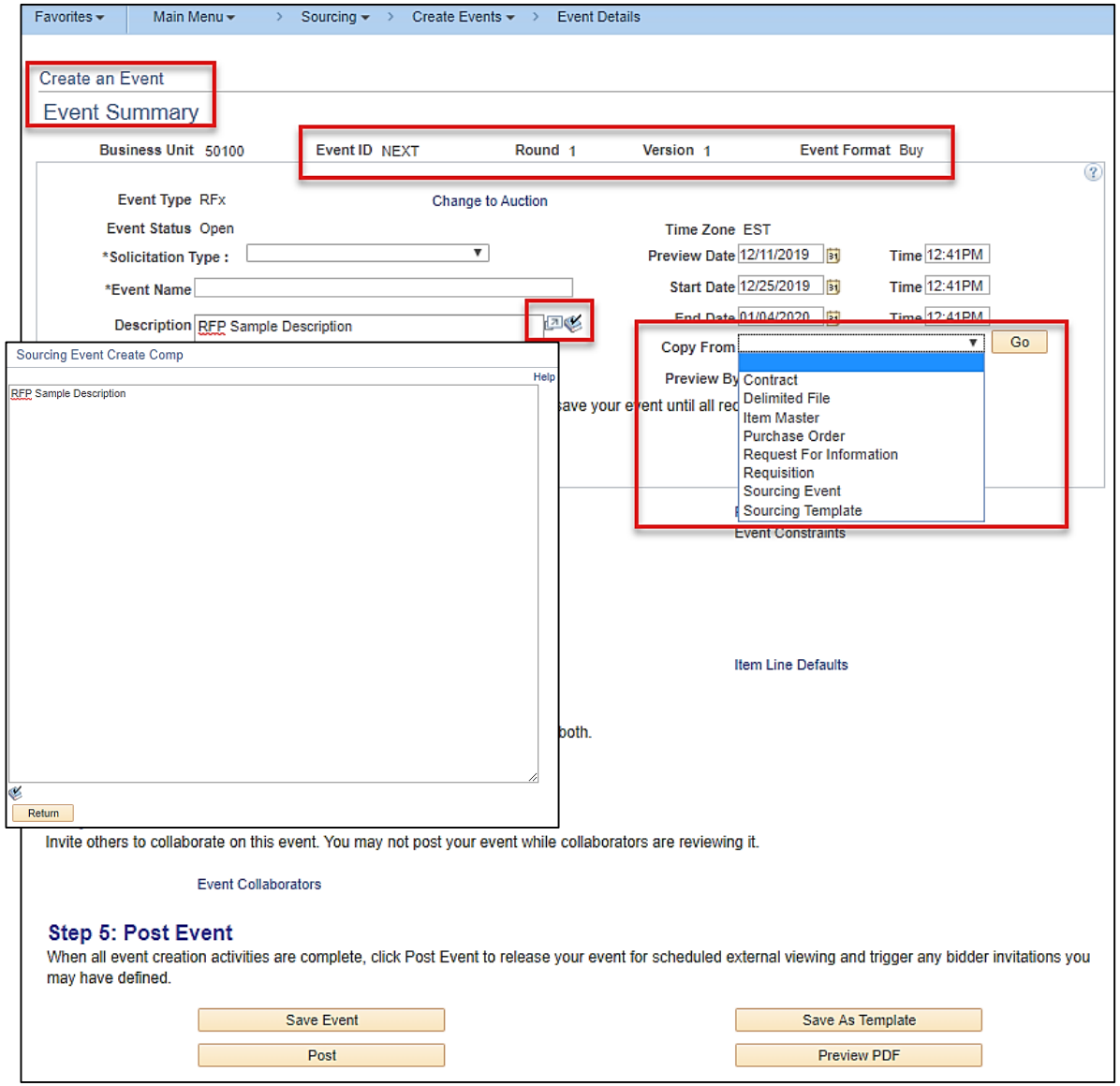
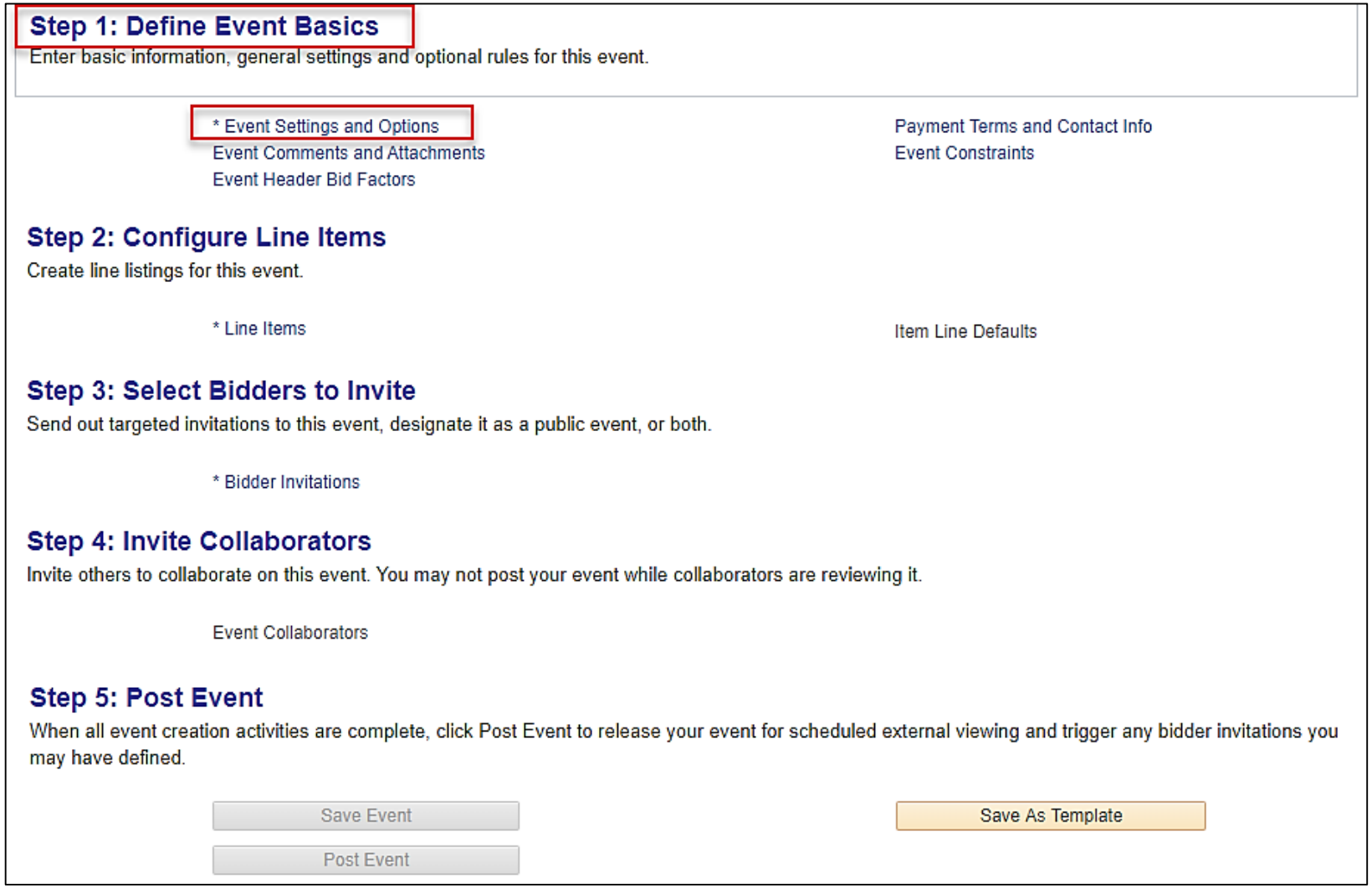
Click on the **Arrow** icon next to the **Description** field to open a larger **Description** box/field. Use the Book Check icon to check spelling errors.



Create Events (continued)

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

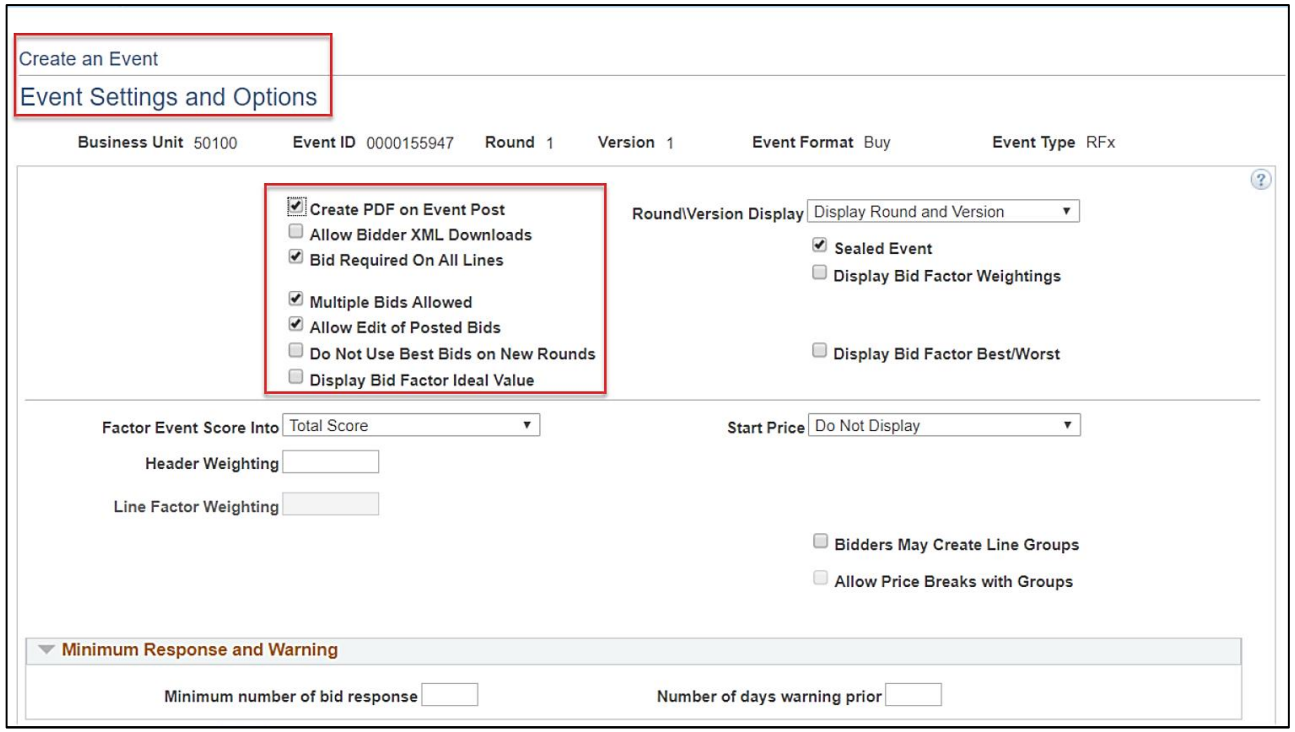
Under **Step 1: Define Event Basics**, click on the **Event Settings and Options** hyperlink to set options for the event.



Define Event Basics

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

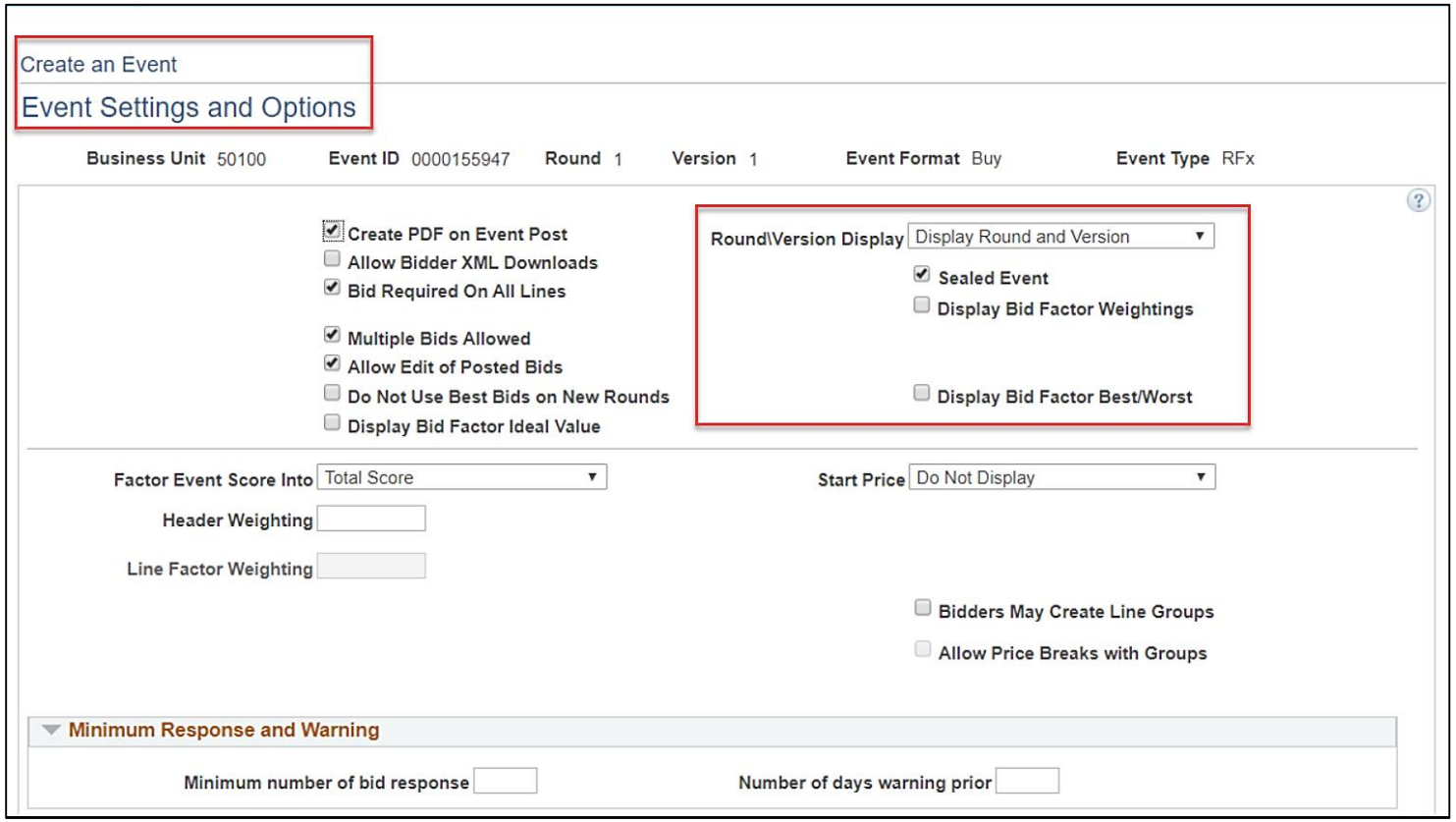
- **Allow Bidder XML Downloads:** Do not select.
- **Bid Required on All Lines:** Select if applicable and/or awarding by Lot/Group.
- **Multiple Bids Allowed**: Will be automatically checked.
- **Allow Edit of Posted Bids:** Defaults to checked. **Bid responses** cannot be changed unless this box is 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.

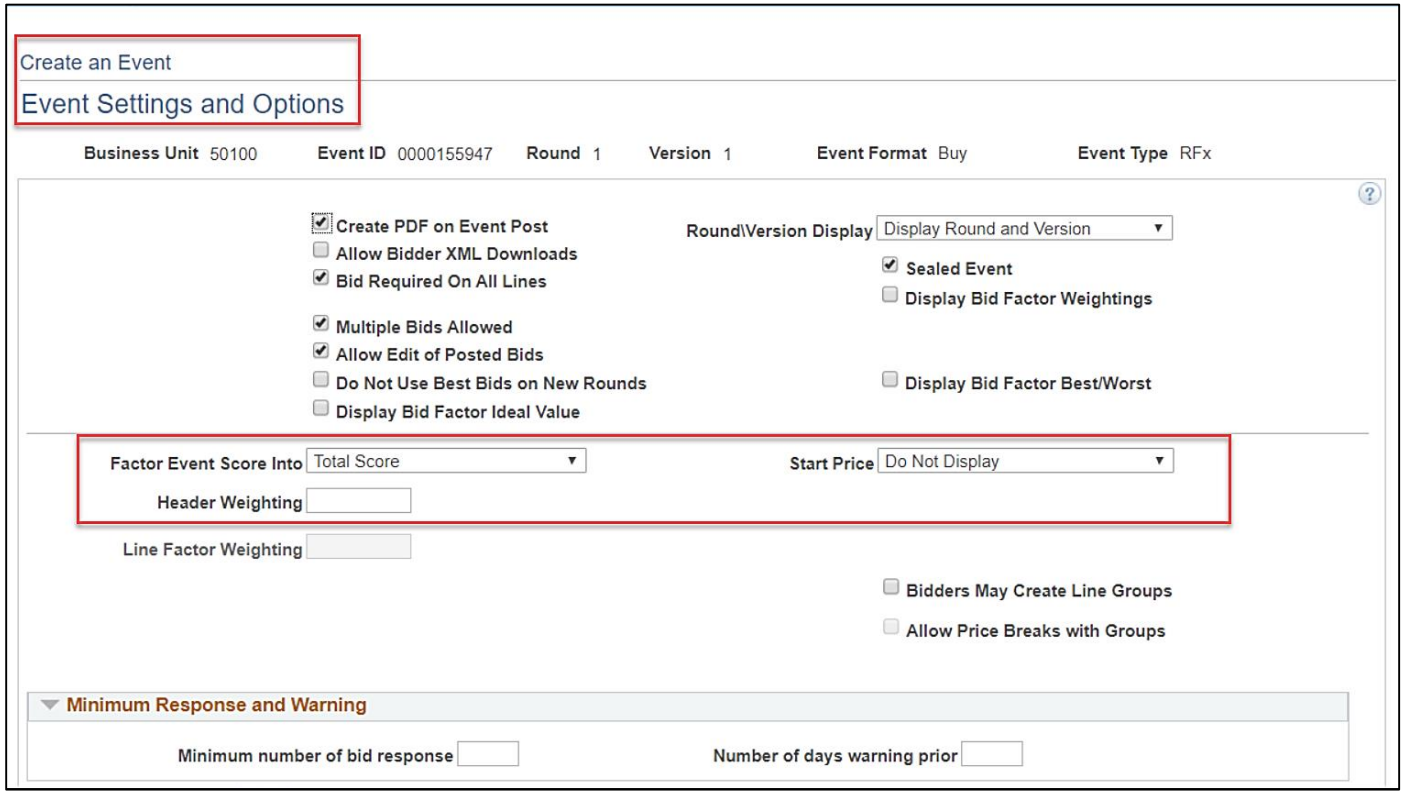


Define Event Basics (continued)

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

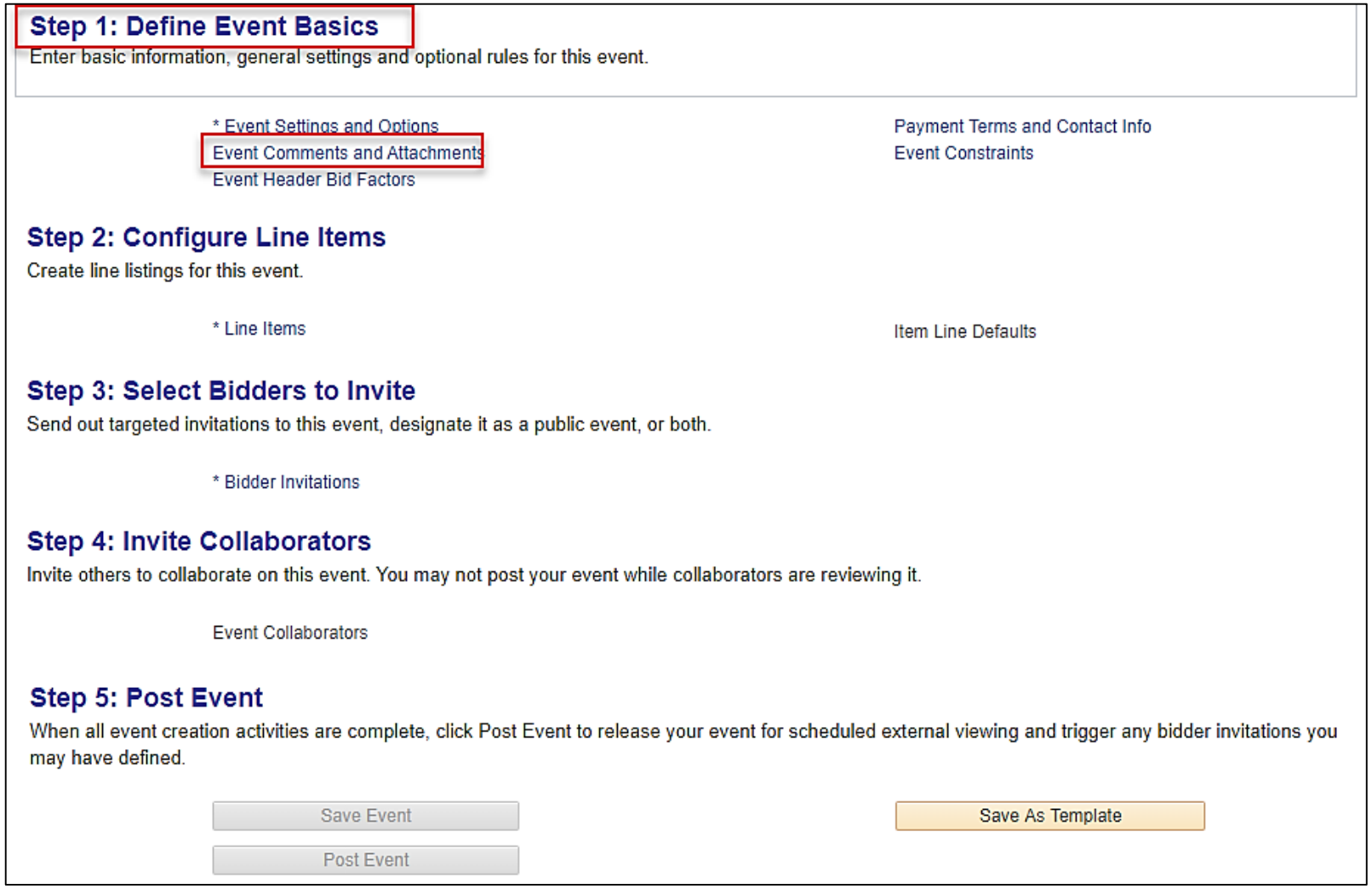
- **Factor Event Score Into:** Defaults to **Total Score.**
- **Header** or **Line Factor Weighting**: Defaults to **blank**.
- **Start Price**: Defaults to **Do Not Display**.

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.

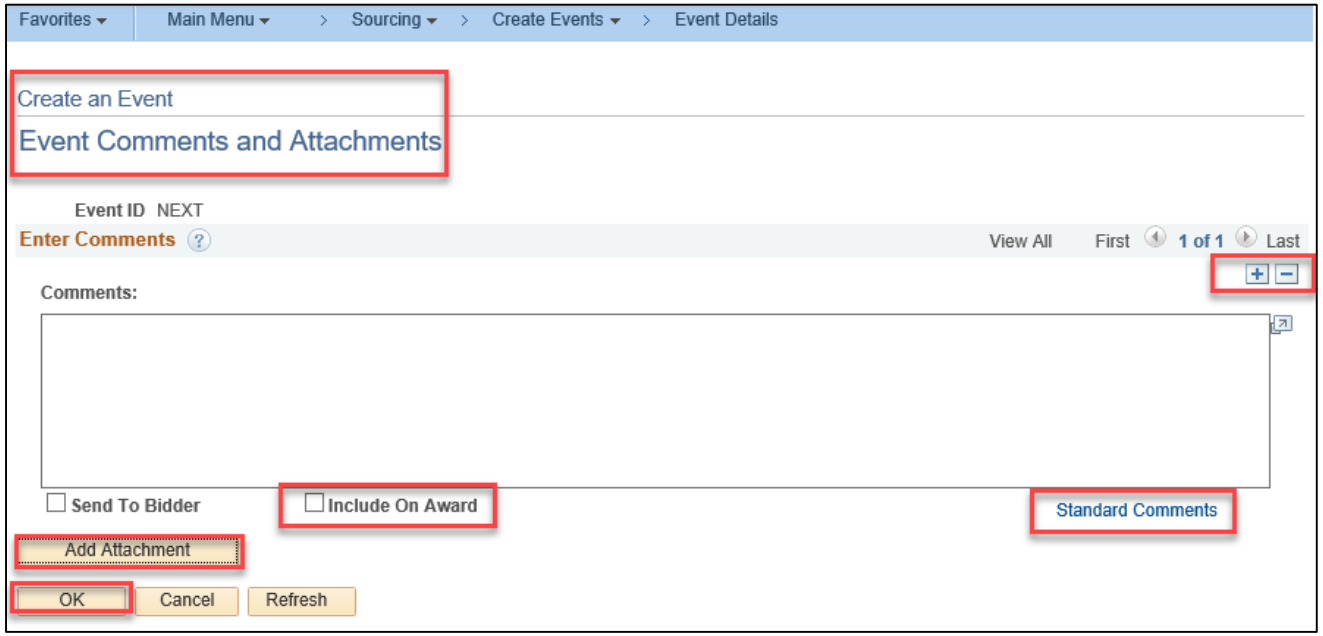


Define Event Basics (continued)

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.

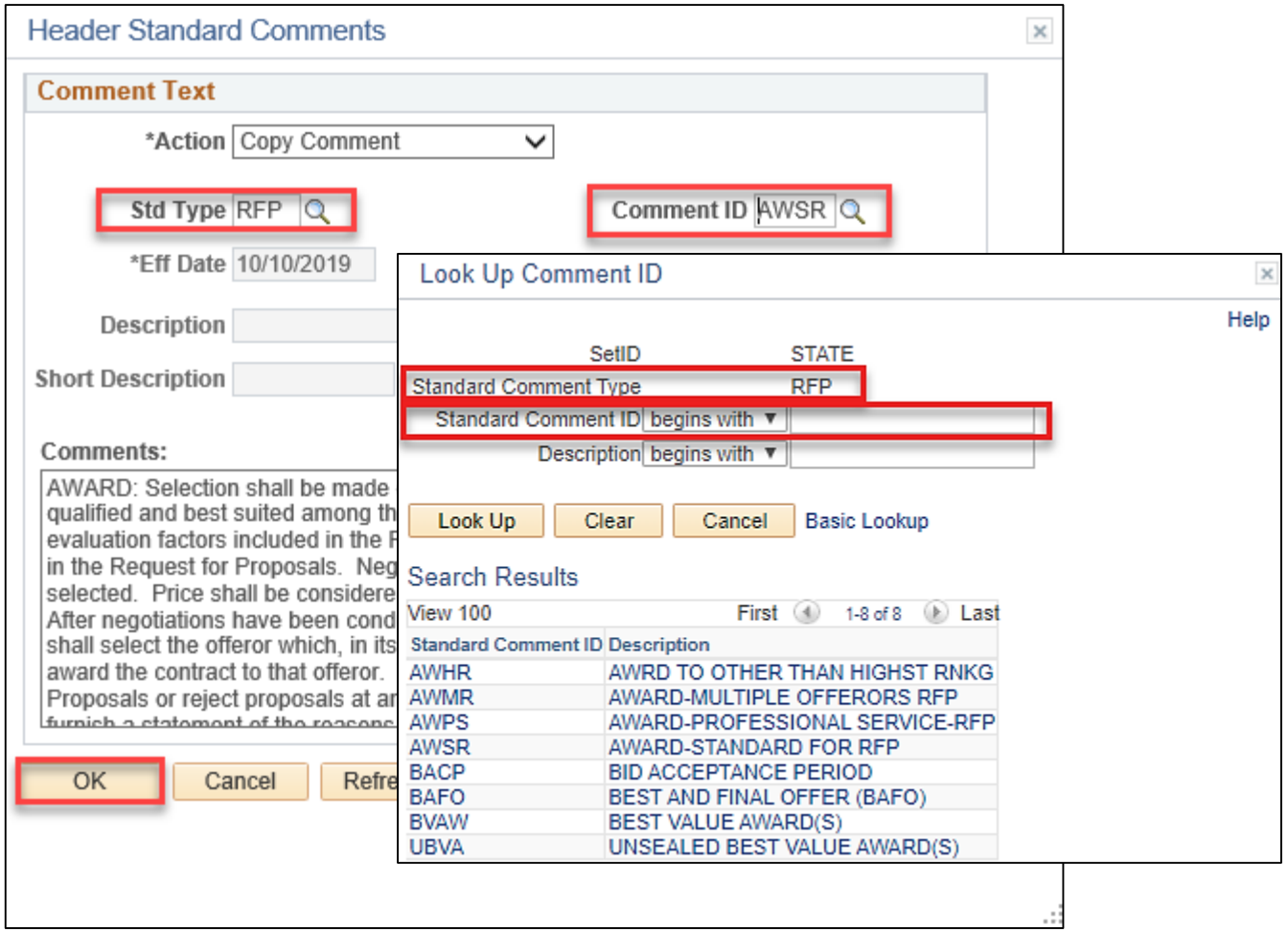
<u>RFP Example:</u>

Std Type = **RFP**

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

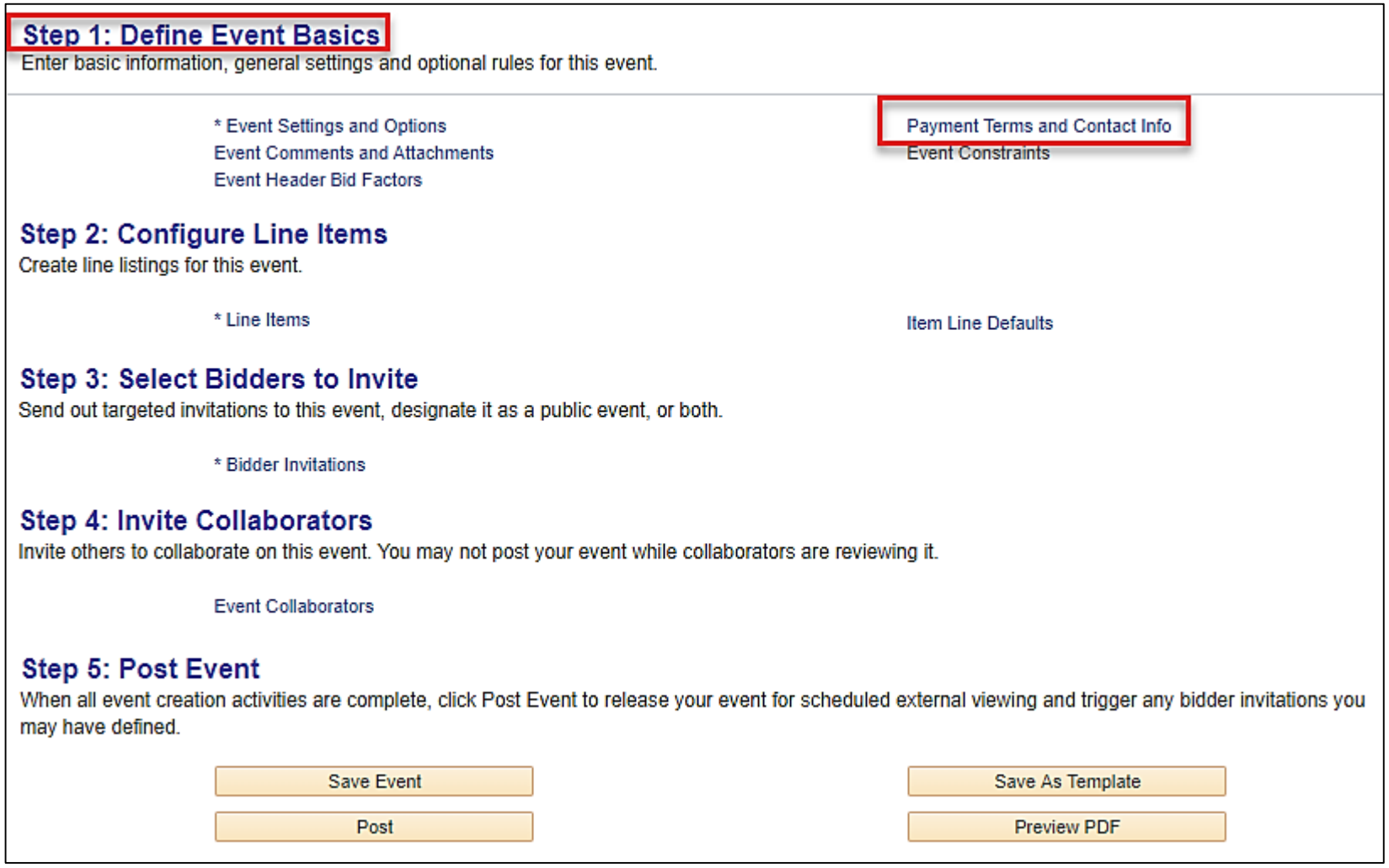
Select a valid value of **AWSR**.

Click **OK**.



Define Event Basics (continued)

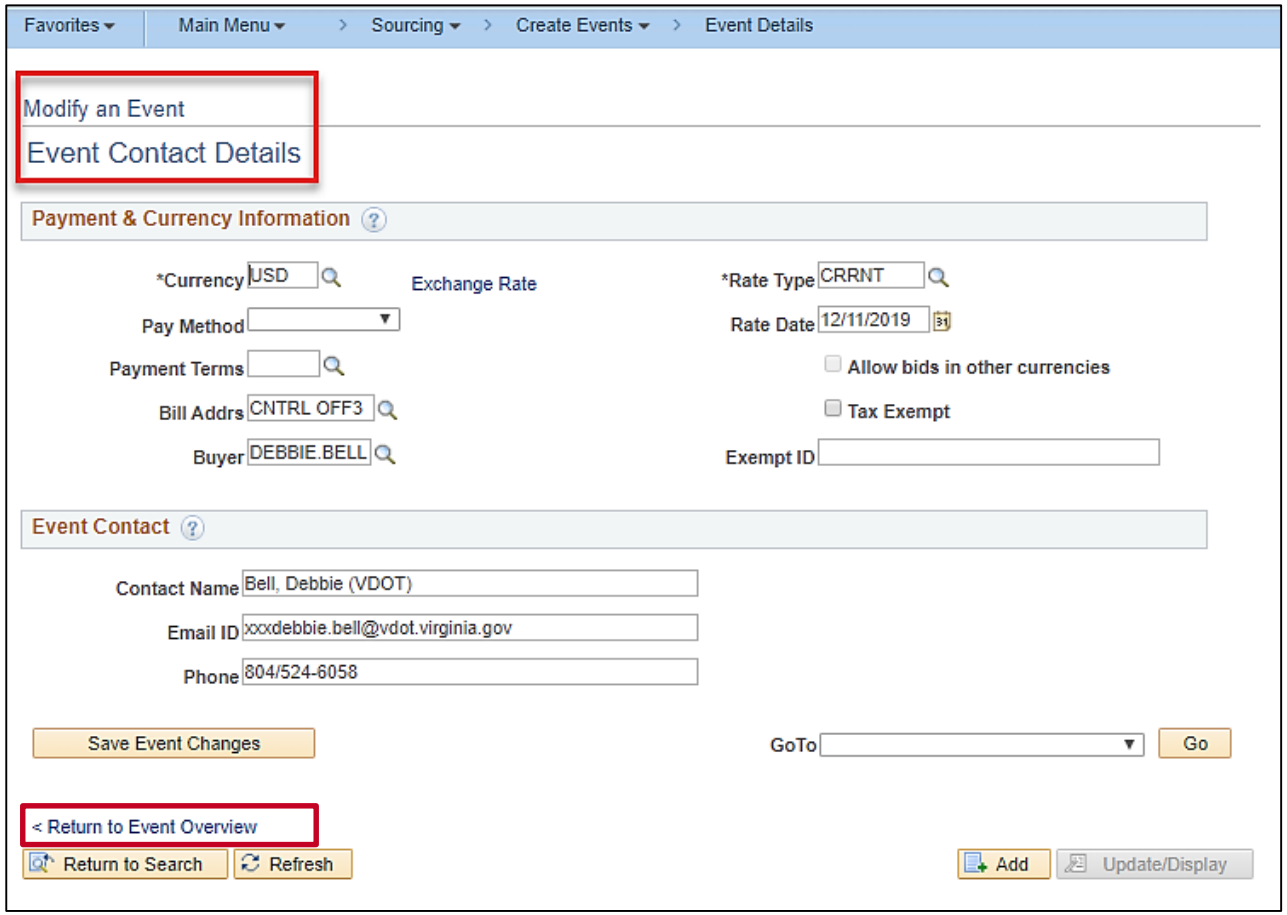
After returning to the **Event Summary** page, under **Step 1: Define Event Basics**, click the **Payment Terms and Contact Info** hyperlink to open the **Event Contacts Details** page.



Define Event Basics (continued)

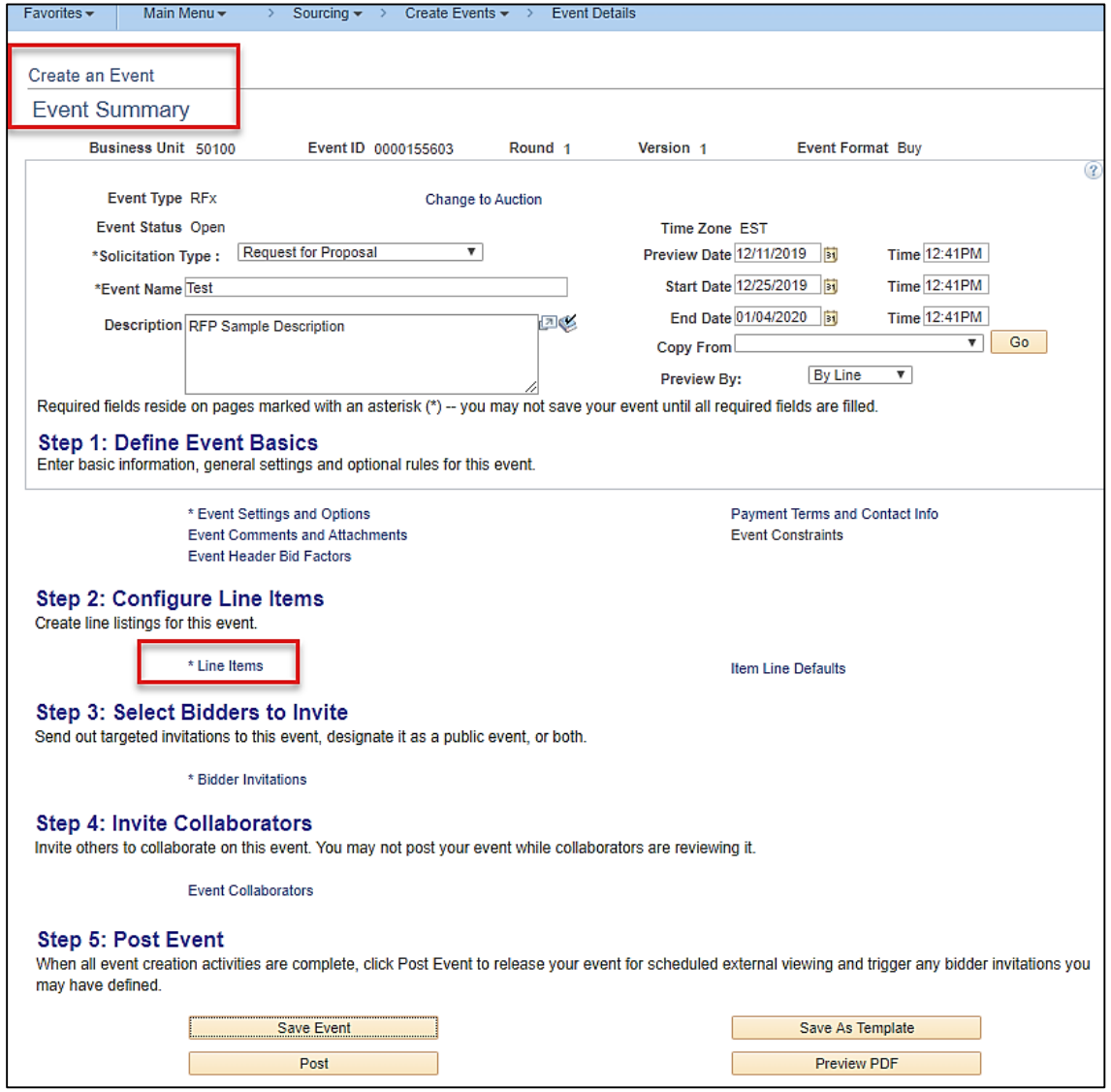
In the **Payment & Currency Information** section of the **Event Contact Details** page, **Bill Addrs** defaults, and in the **Event Contact** section the user **Contact Name**, **Email ID**, and **Phone** defaults. These fields can be modified.

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

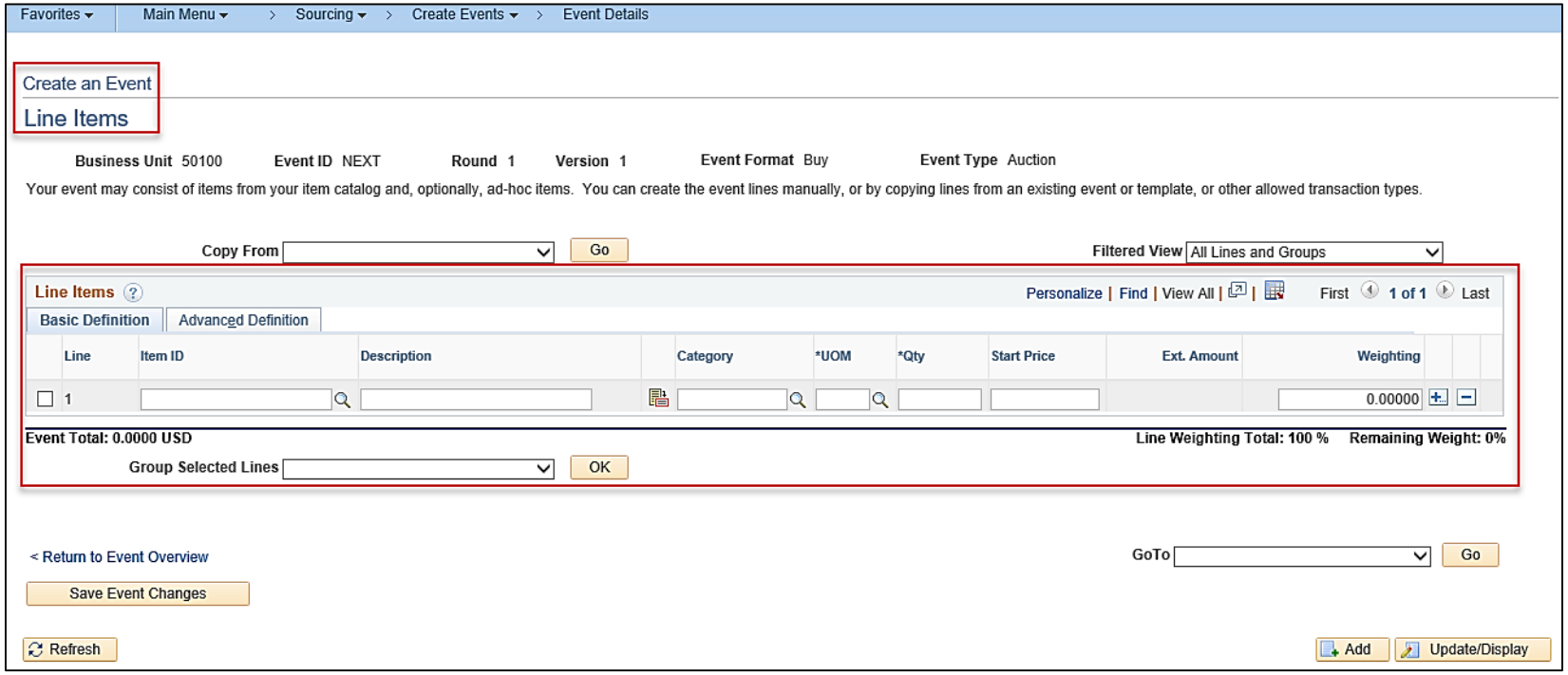
From the **Event Summary** page, under **Step 2: Configure Line items**, click the **Line Items** hyperlink.



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)

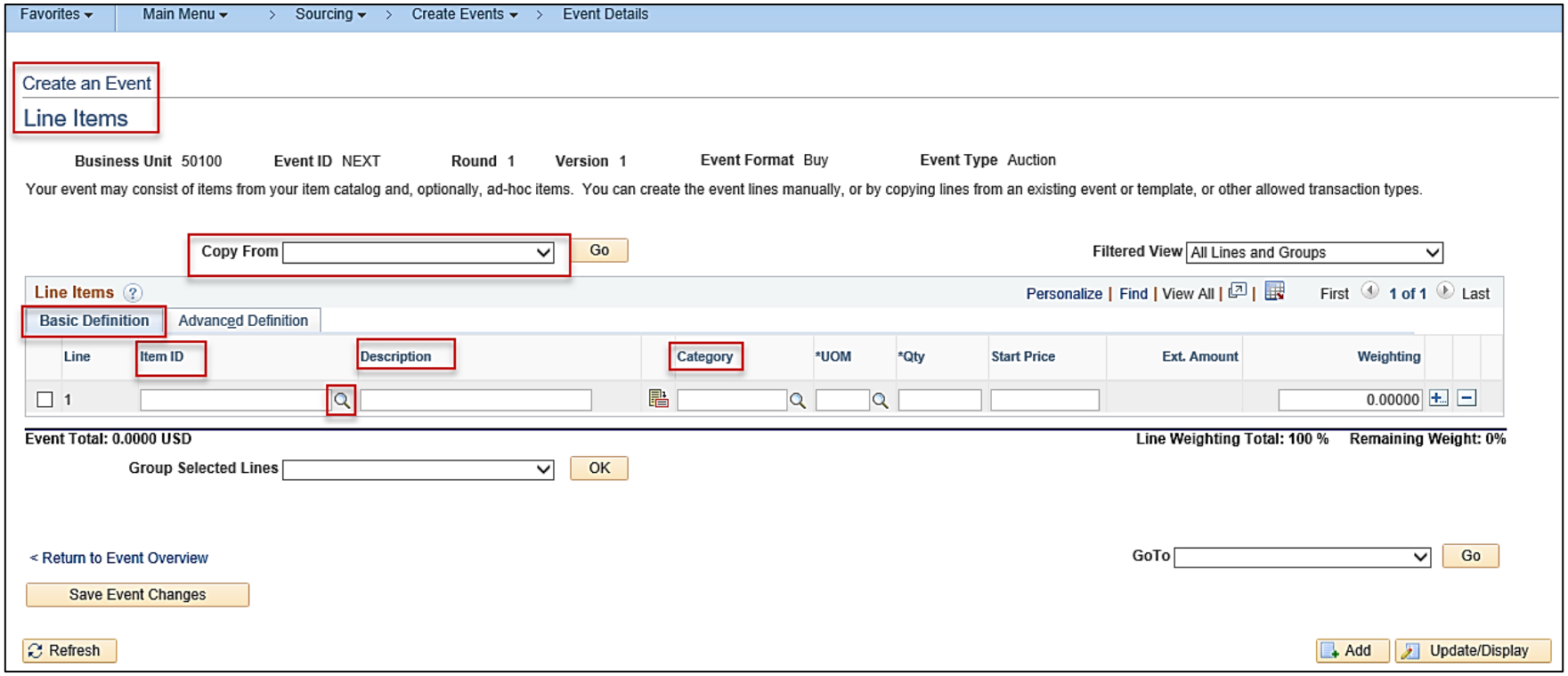


Configure Line Items (continued)

Basic Definition tab:

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

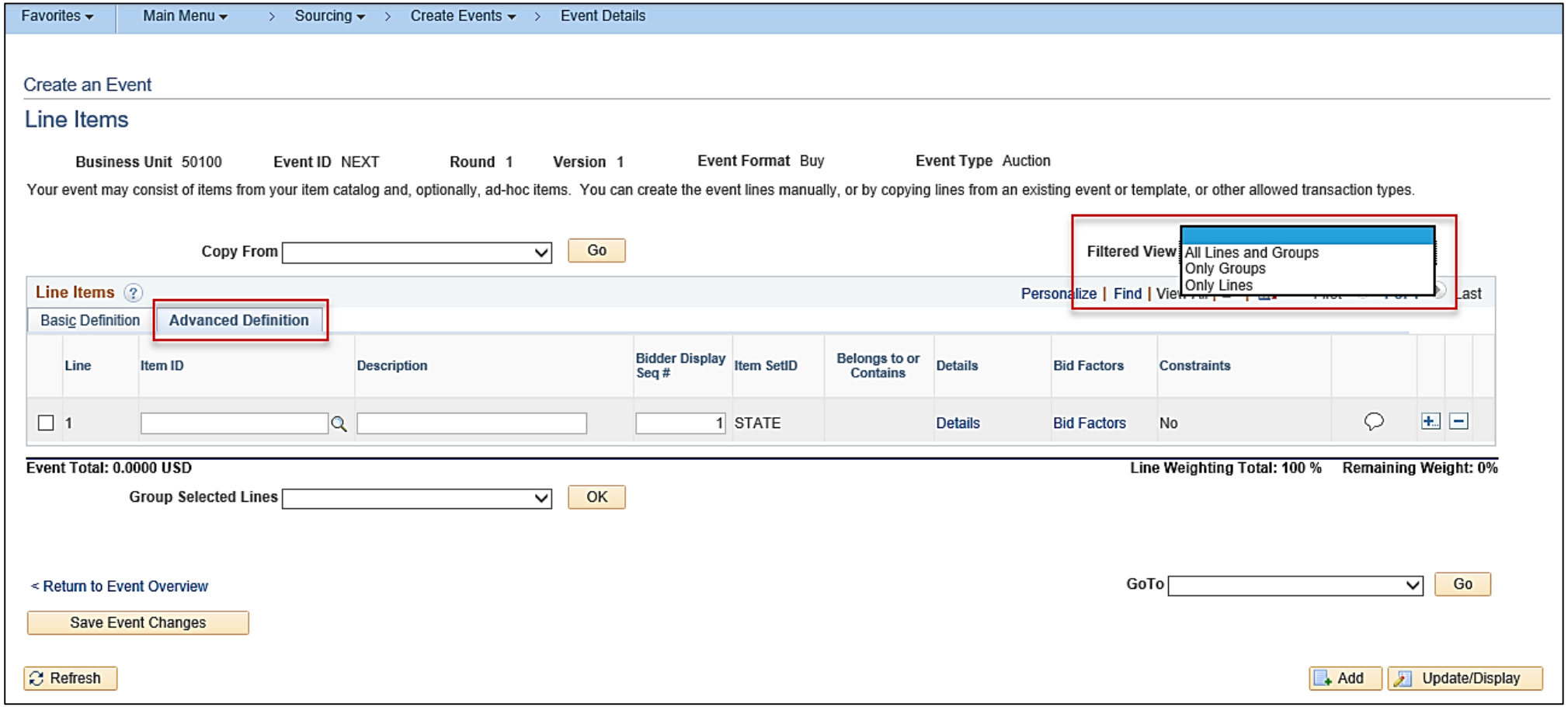
- **Item ID:** Click the **Look up** icon and select the item. Once selected, details for that item are displayed and include **Description**, **Category**, **UOM**, and **Start Price**. **Description, Category**, and **UOM** are fixed and cannot be changed. **Qty** must be entered.
- **Category:** When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

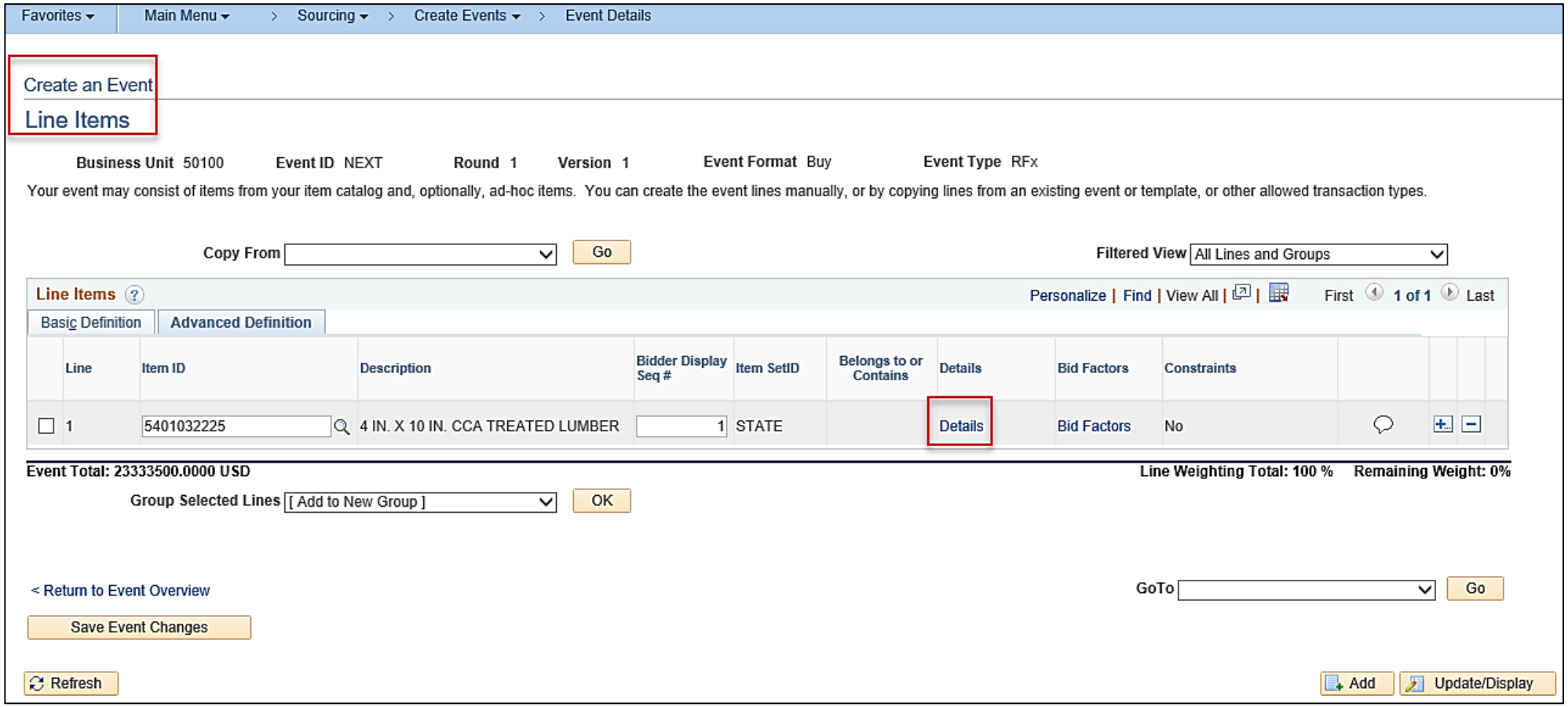
The **Filtered View** changes the view on this page, by selecting **All Lines and Groups**, **Only Groups**, or **Only Lines**.



Configure Line Items (continued)

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

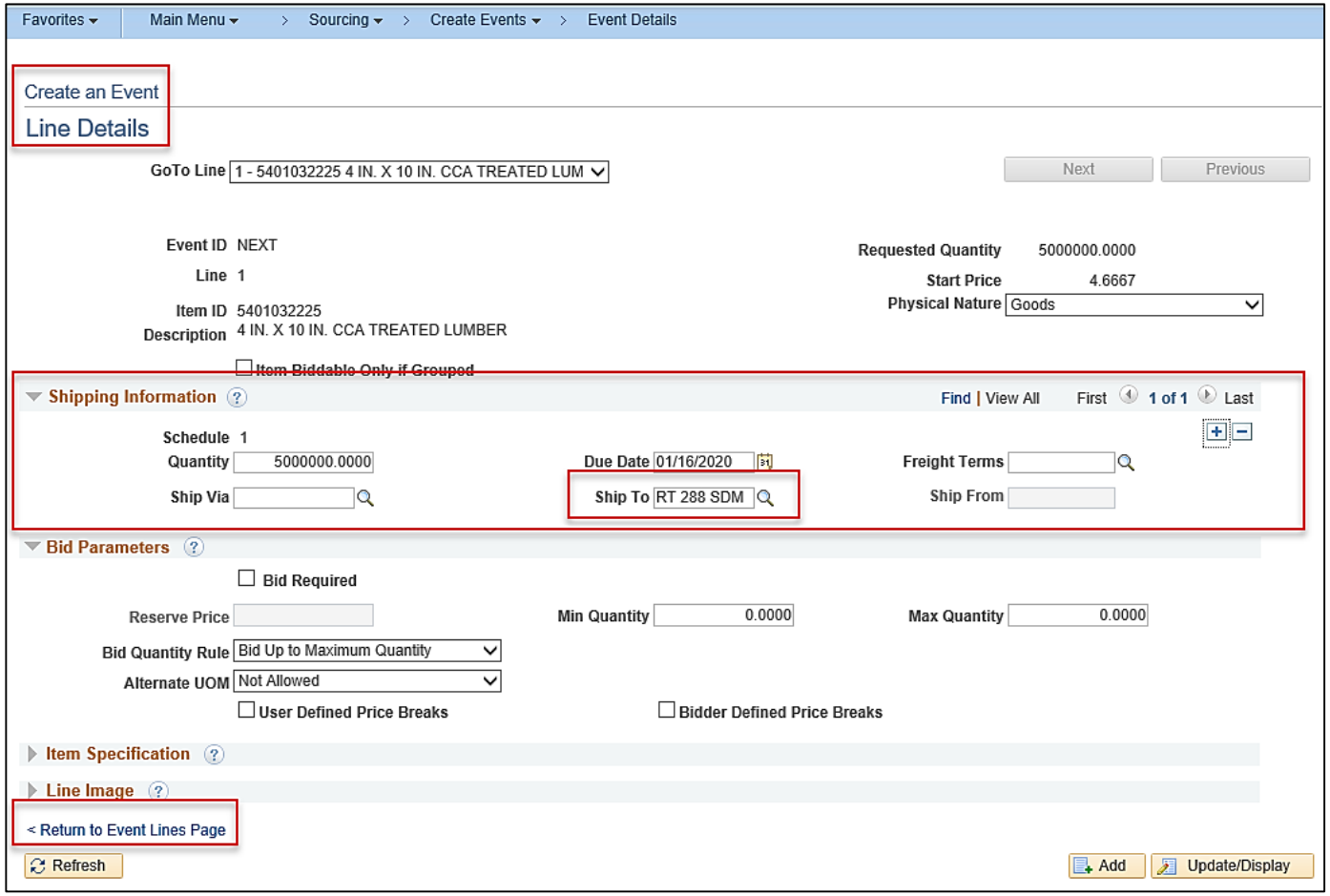
- Click on the **Details** hyperlink to access the **Line Details**.



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.

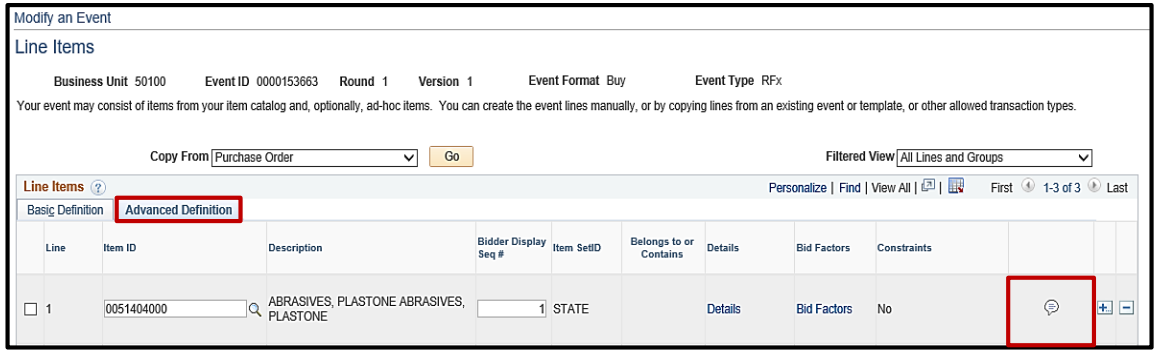


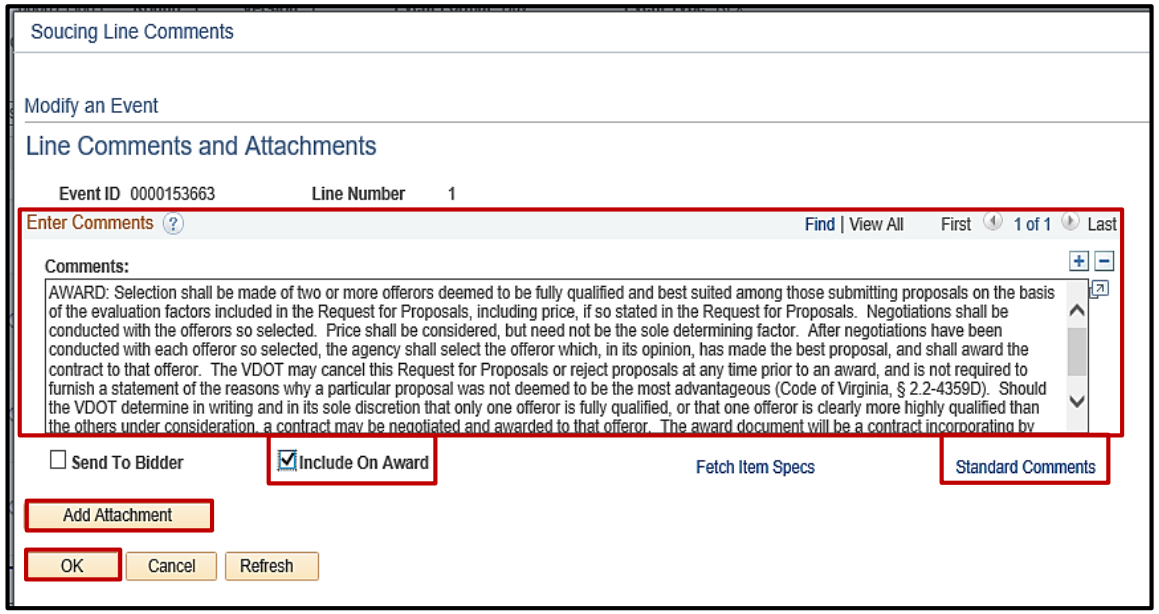
Once all data is entered, click the **Return to Event Lines Page** hyperlink to return to the **Line Items** page.

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**.



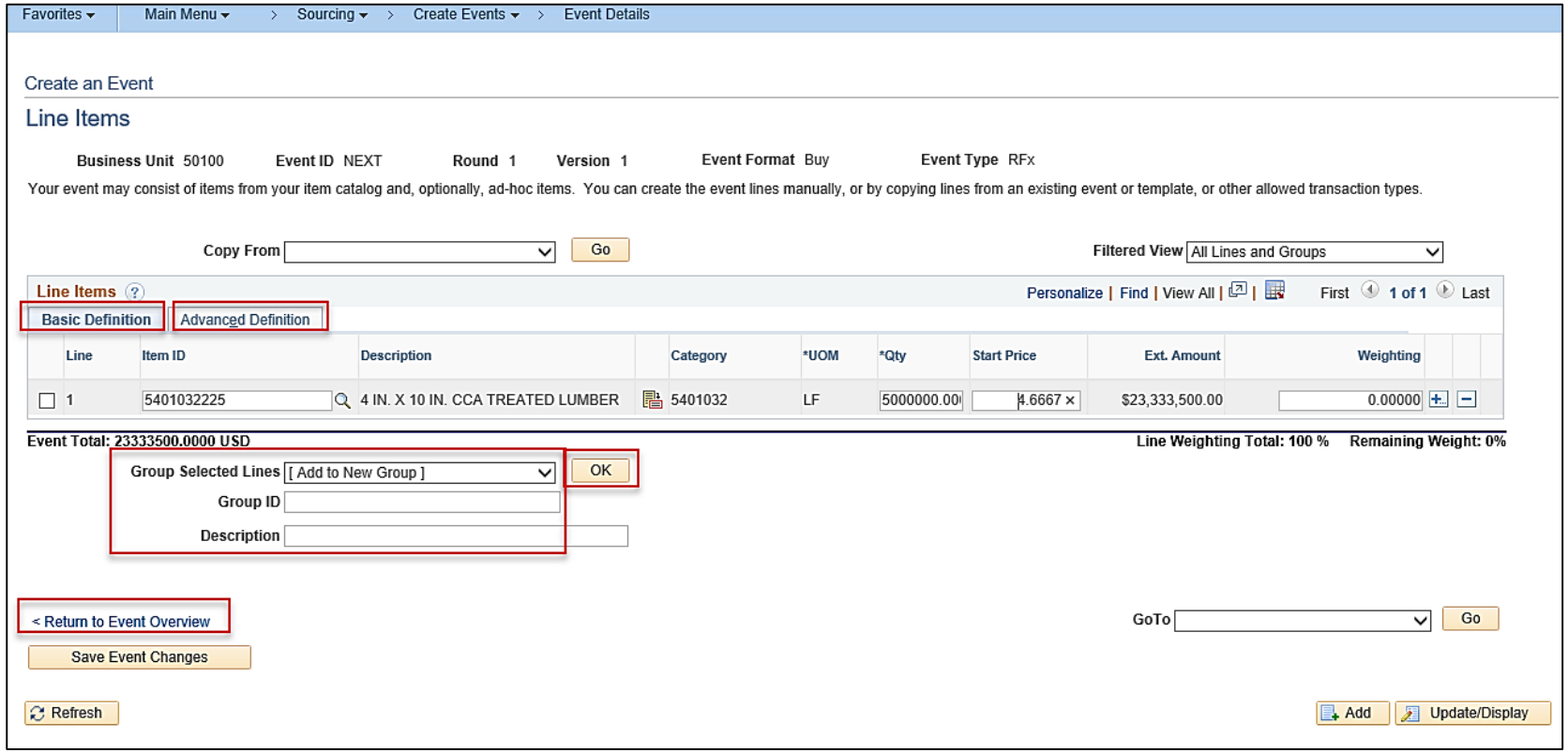


Configure Line Items (continued)

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

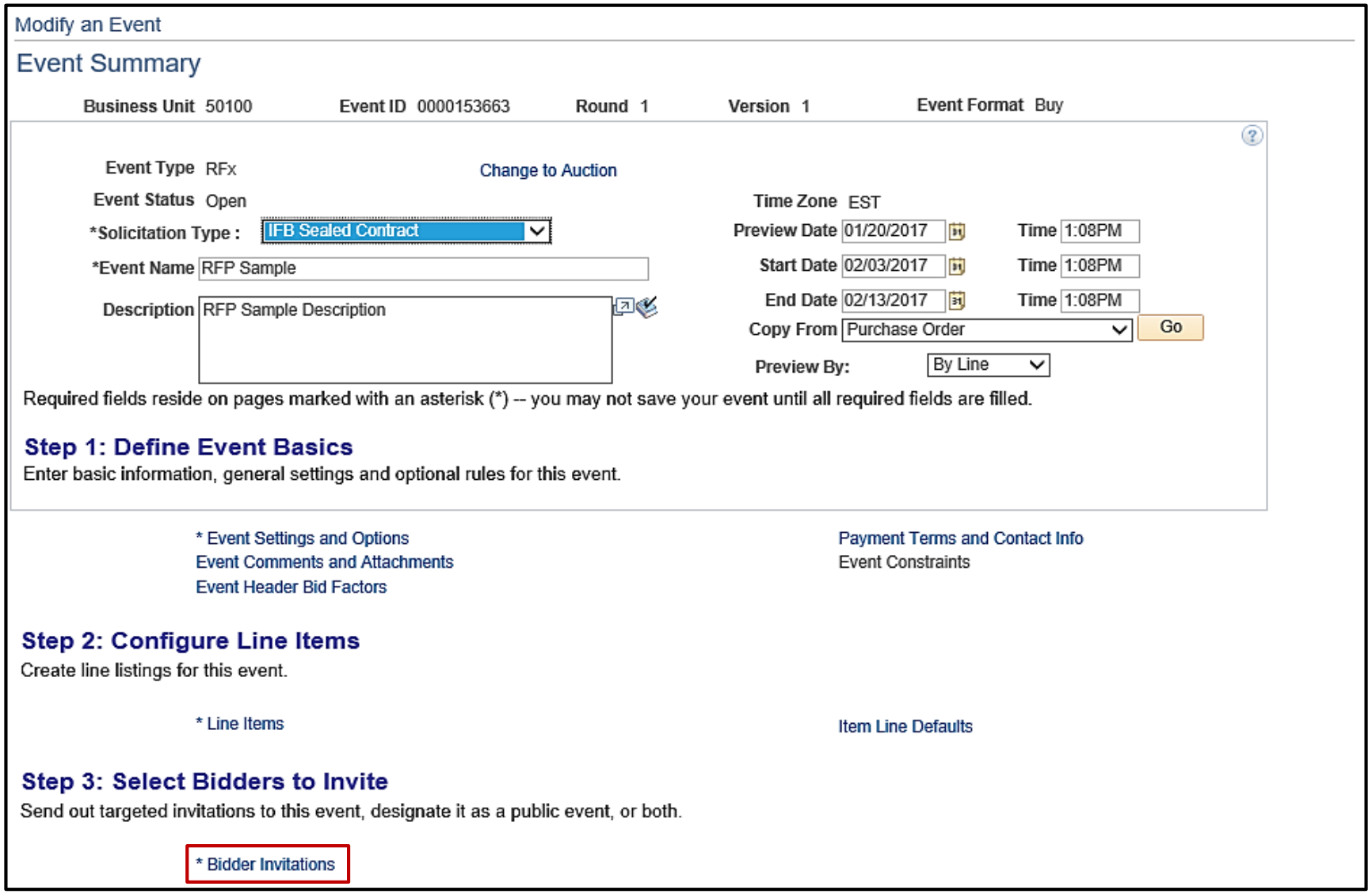
During event creation, users can select lines that they want to group to attempt to get better pricing through a bundled price quote.

- **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.

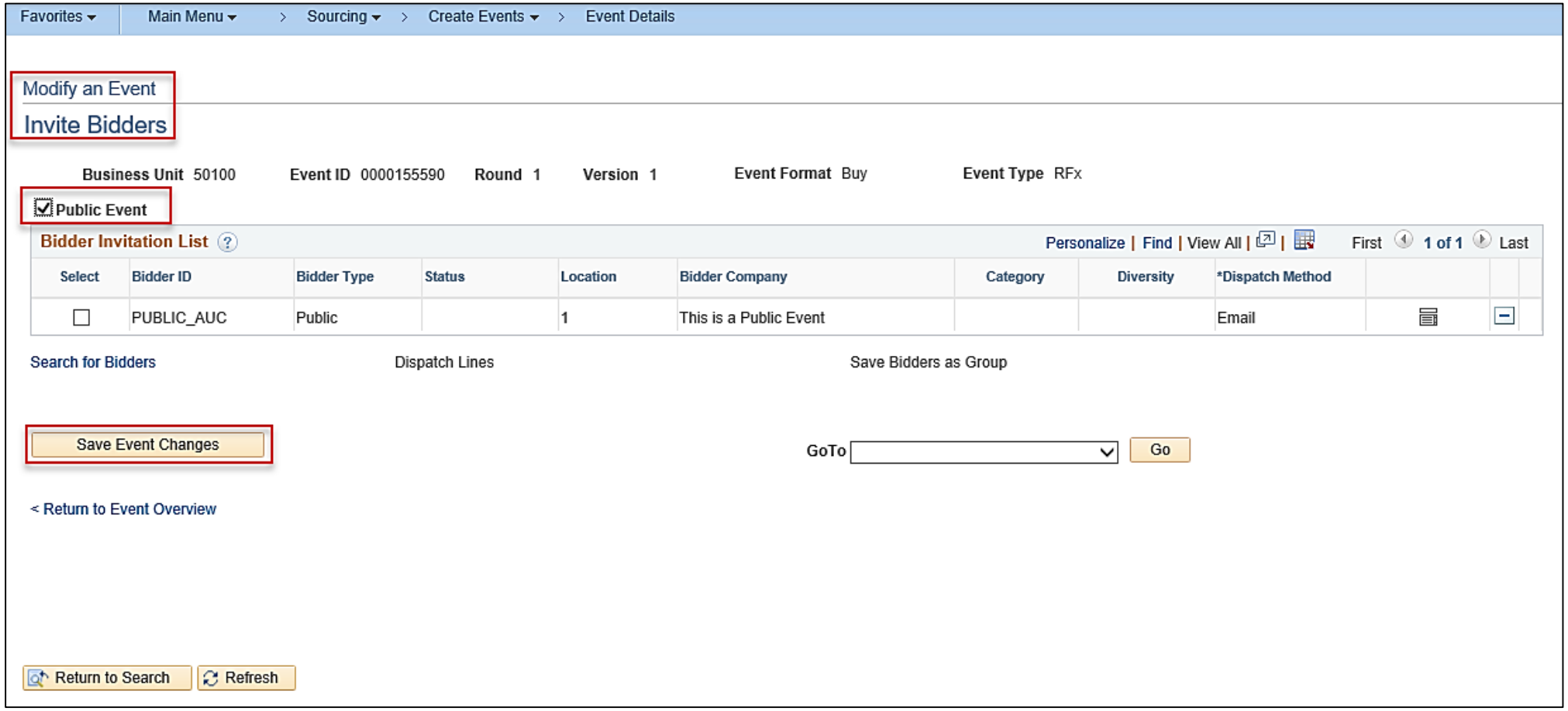


Select Bidders/Offerors to Invite (continued)

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.

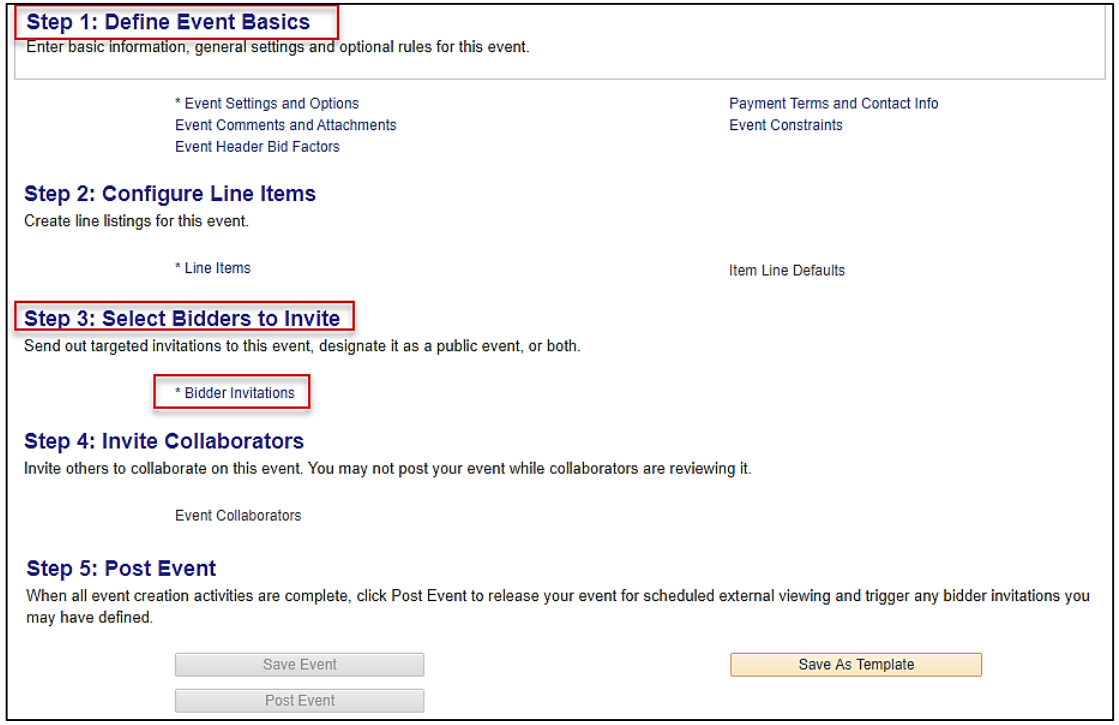
Click **Save Event Changes.**



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.



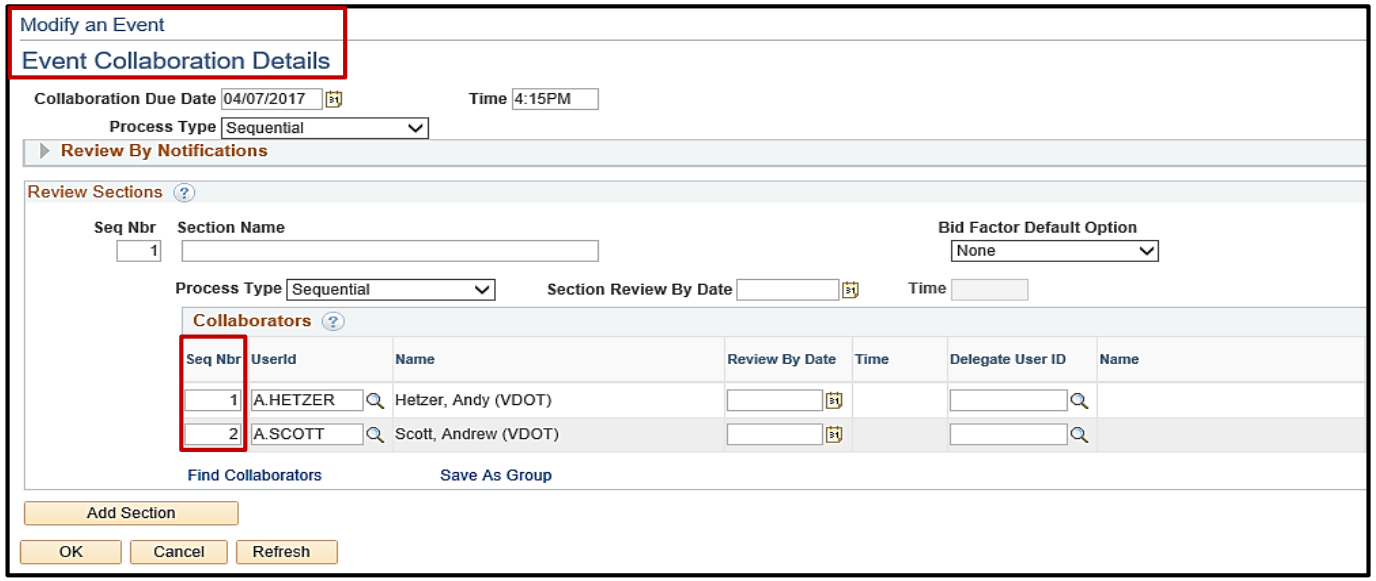
For more detailed information about **Collaboration**, see the job aid entitled **501 PR345: Strategic Sourcing Collaboration** located on the Cardinal website in **Job Aids** under **Training**.

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.

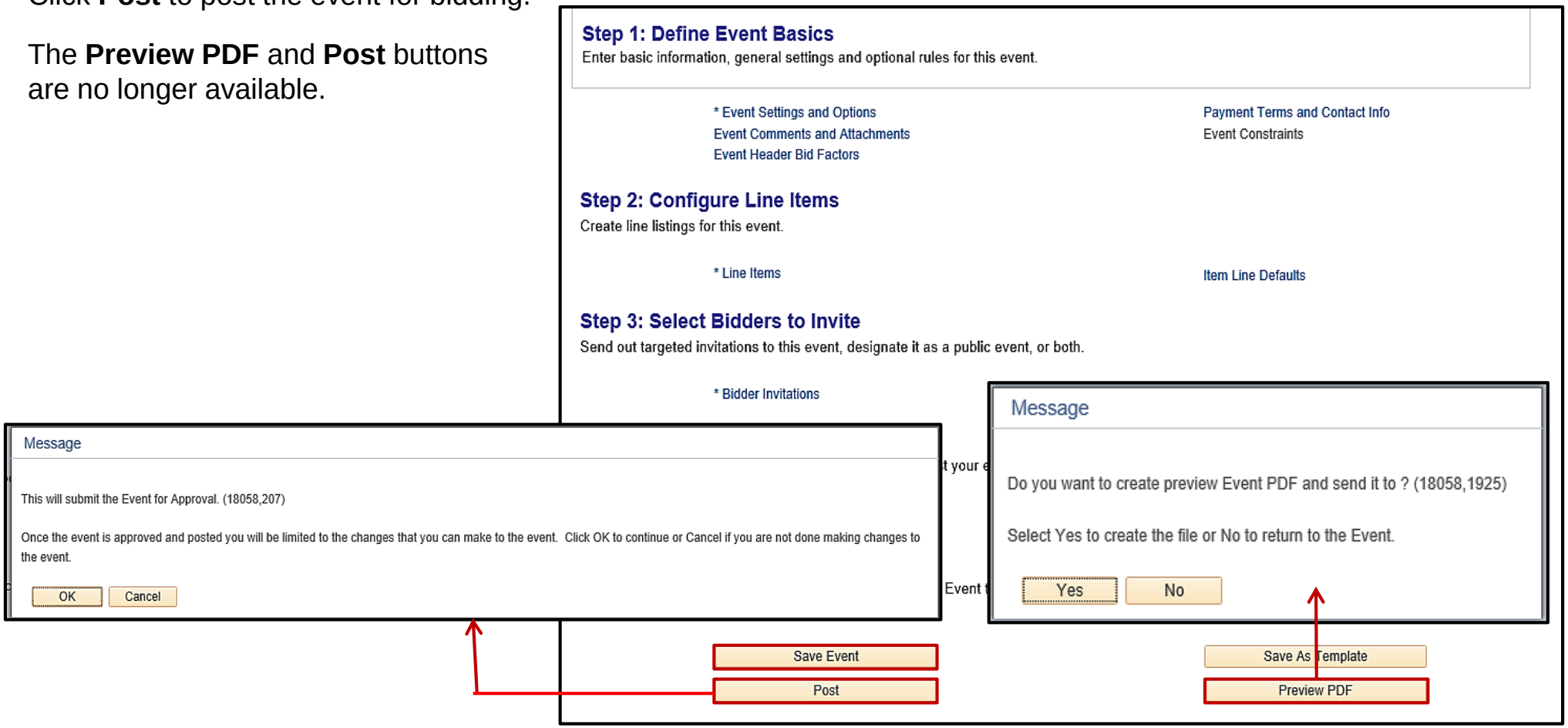
Once all the details have been set and Collaborators added, click **OK** and then **Save Event** to return to the **Event Summary** page.



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. This PDF is for the manual posting to eVA.
- Click **Post** to post the event for bidding.
- The **Preview PDF** and **Post** buttons are no longer available.



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:

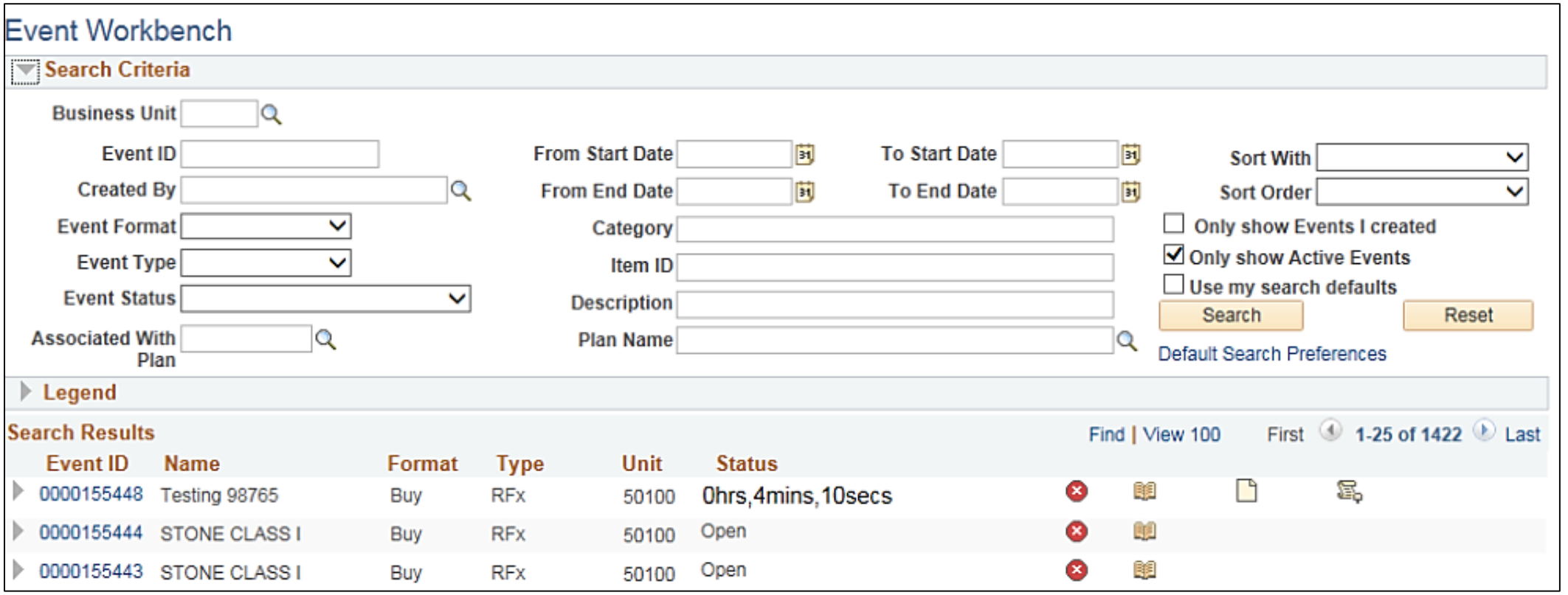
- Using the Event Workbench
- Change an Event - Versions

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:

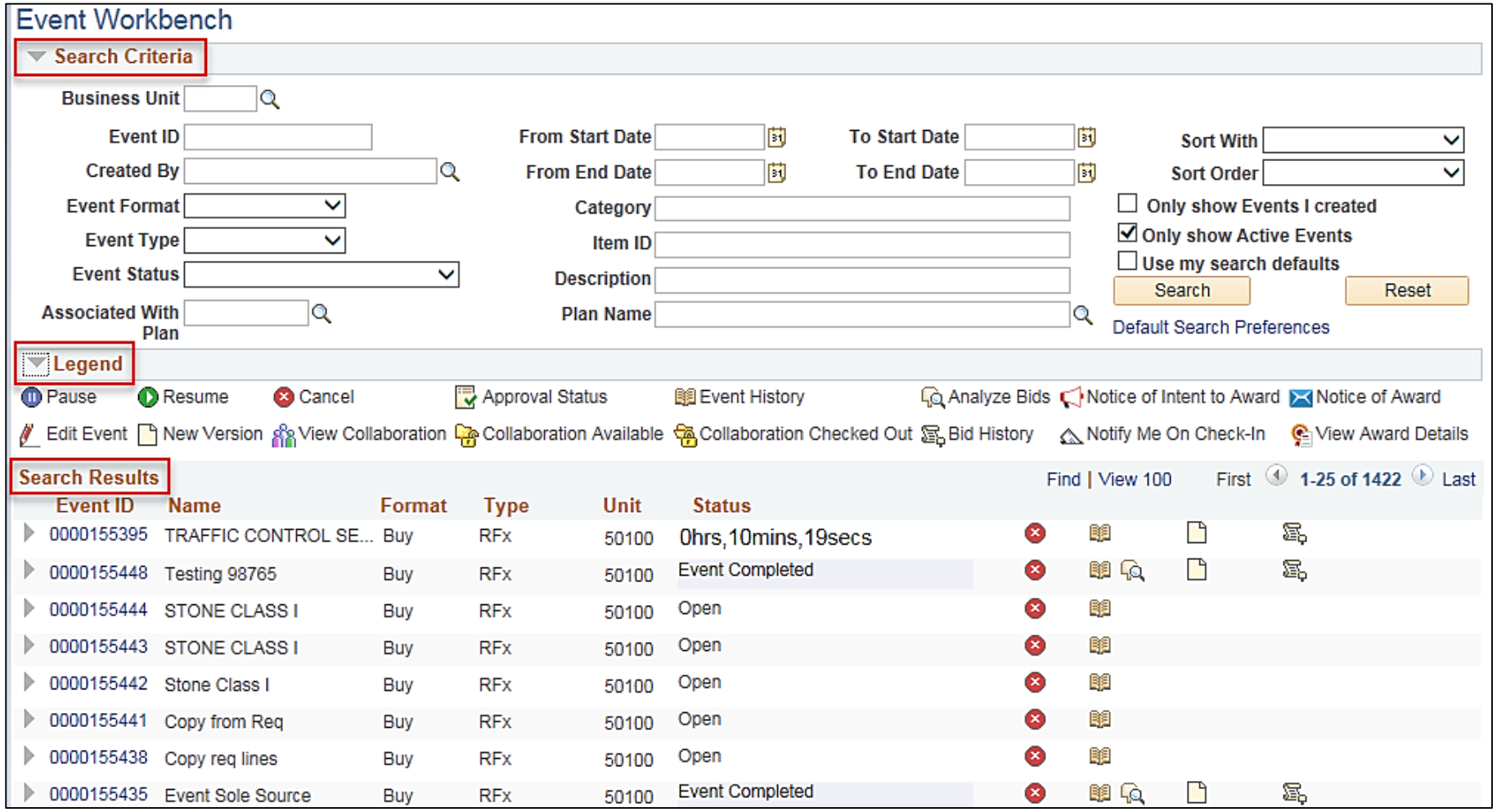
Main Menu > Sourcing > Maintain Events > Event Workbench



Using the Event Workbench (continued)

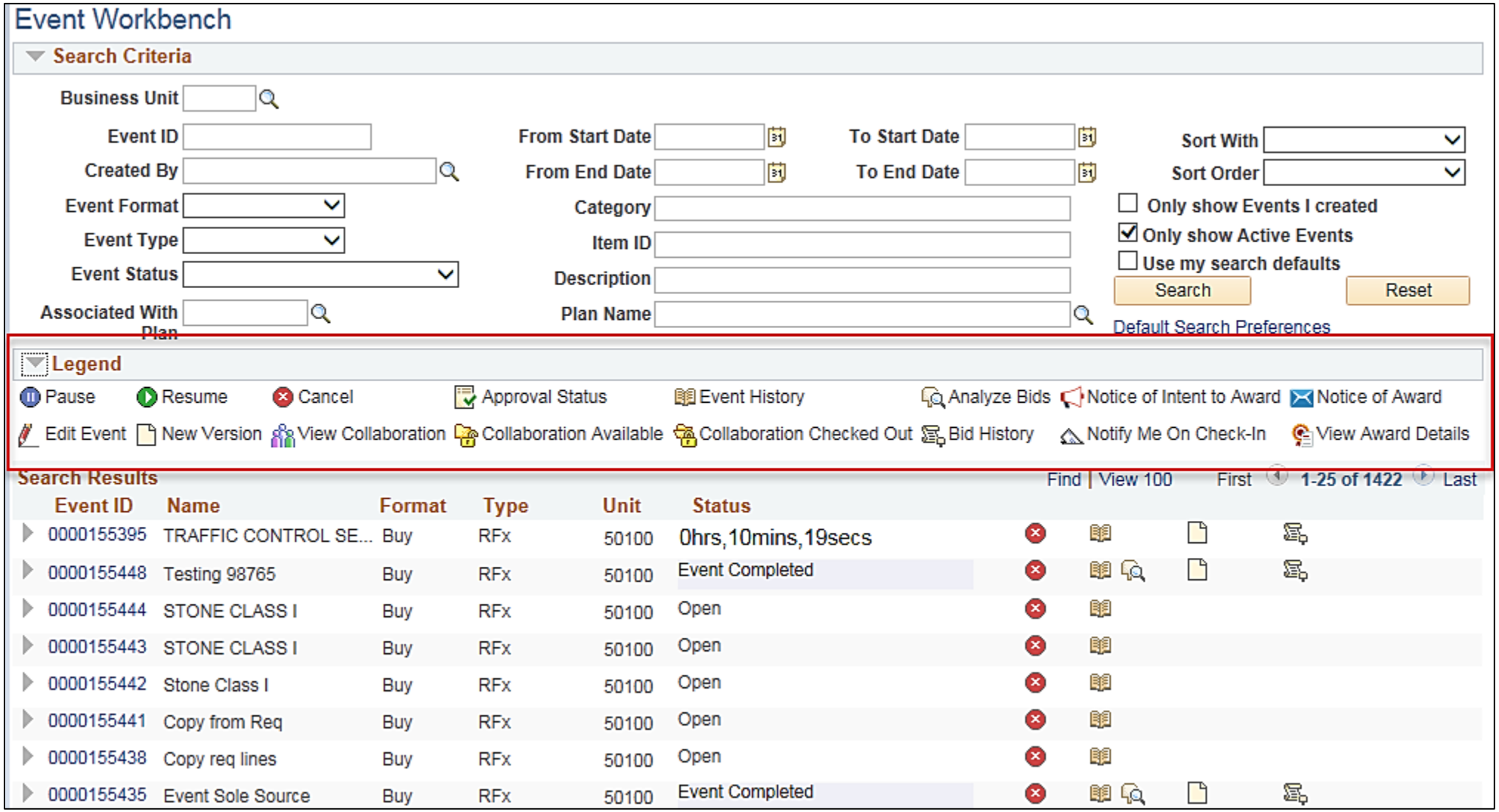
The **Event Workbench** page has three sections: **Search Criteria**, **Legend**, and **Search Results**.

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.



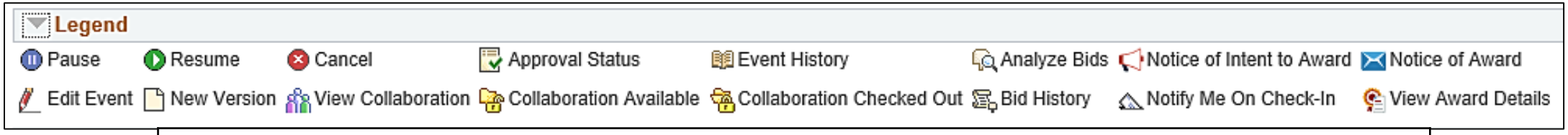
Using the Event Workbench (continued)

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)

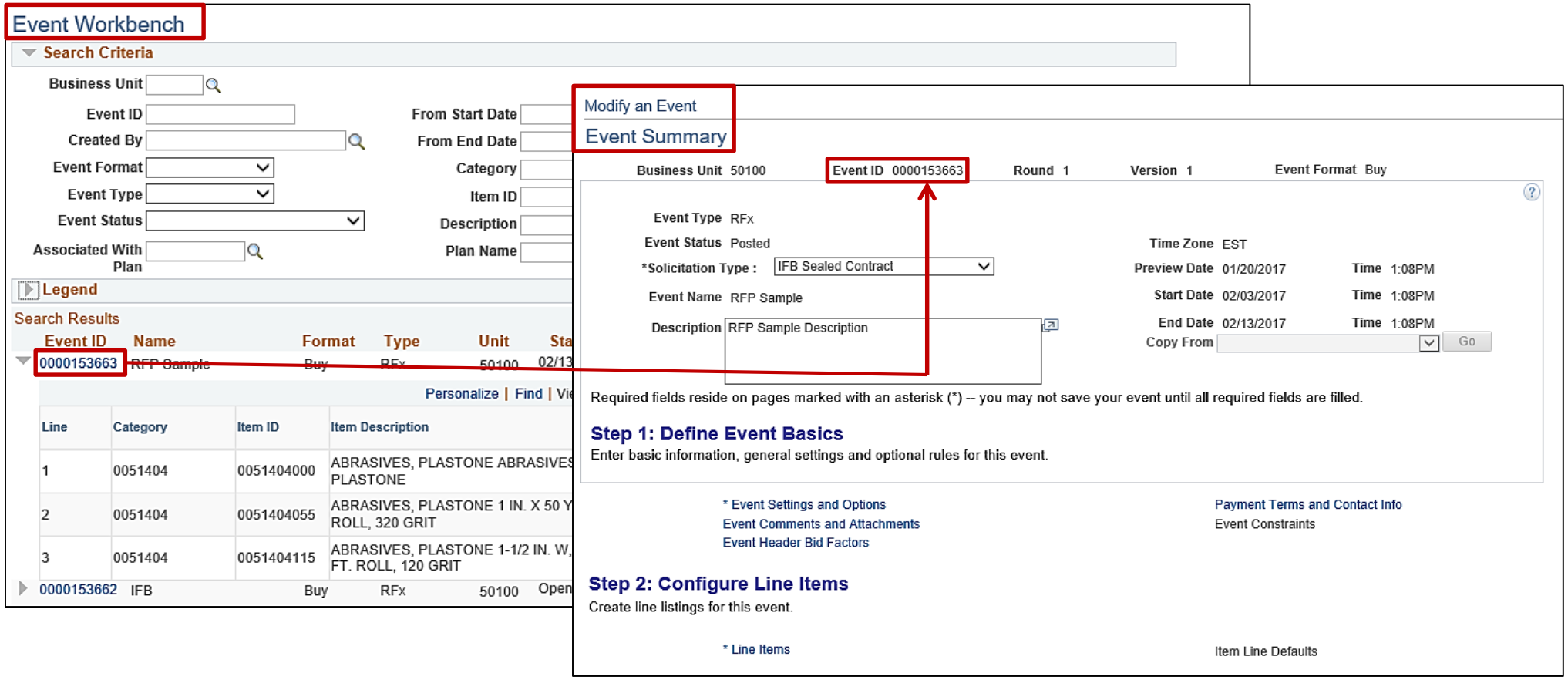
Event Workbench Legend explanation of icons



	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

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.

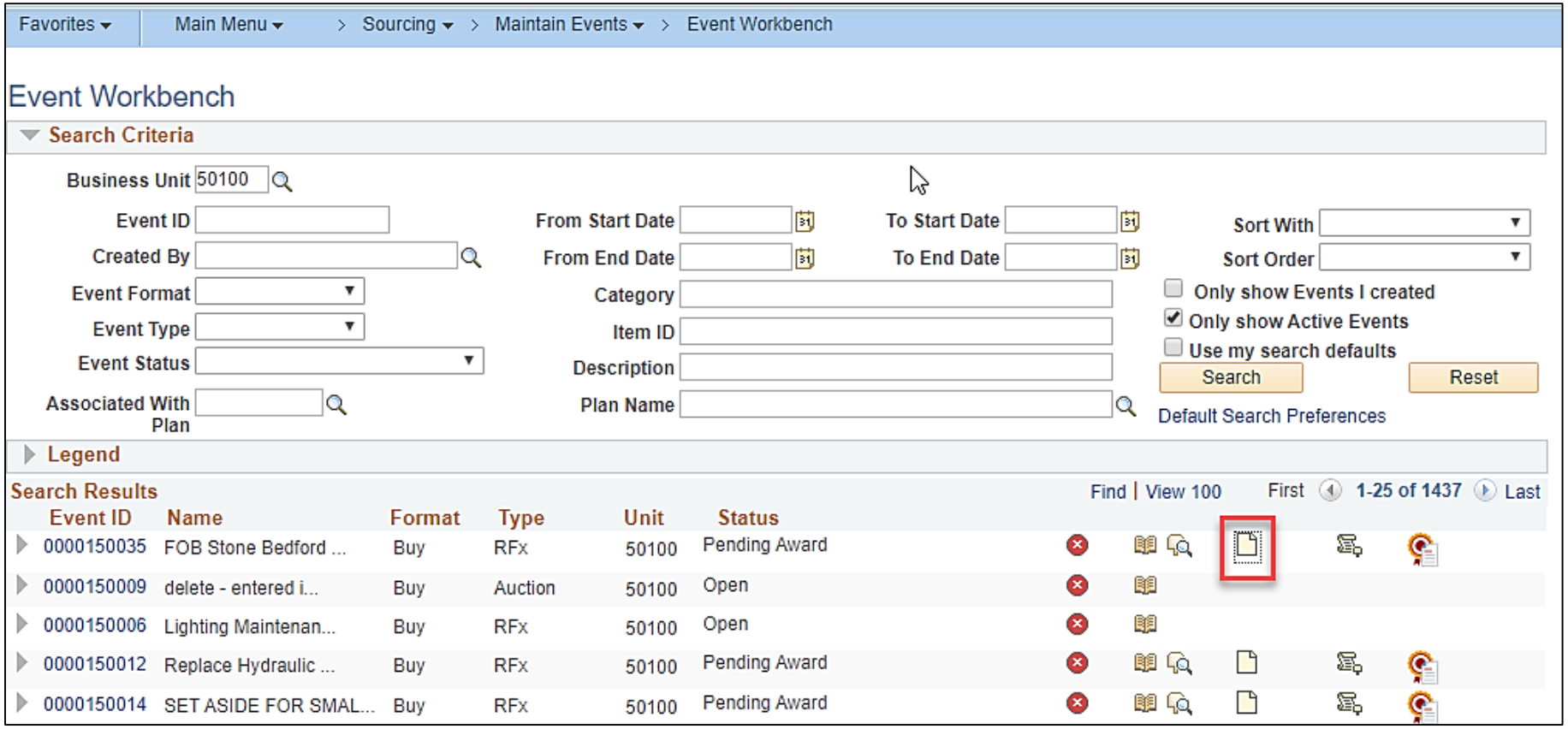


Change an Event: Versions

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

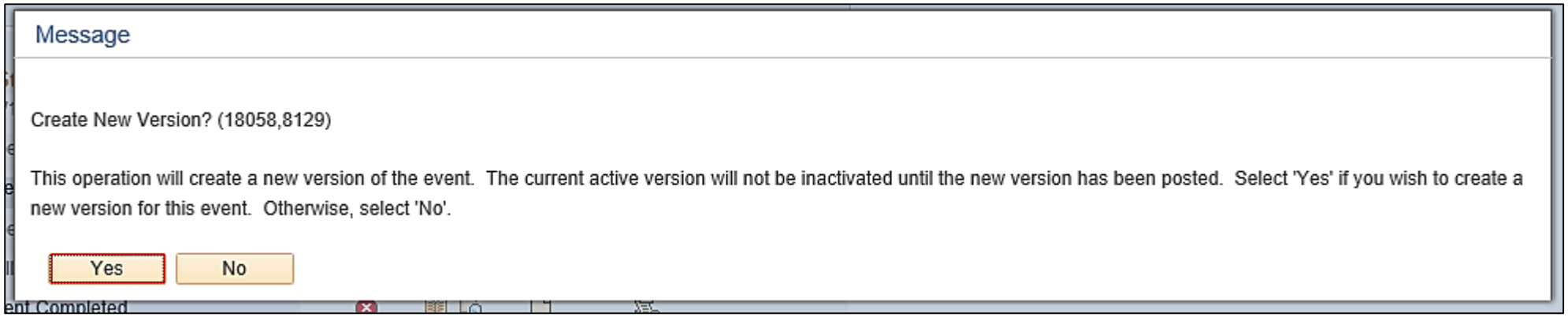
Use the **Event Workbench** to create and edit versions. When viewing a multiversion event, the system always displays the most recent version of the event. When creating a new event version, the version number increments by one. When posting the new version, the previous version becomes read-only.

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



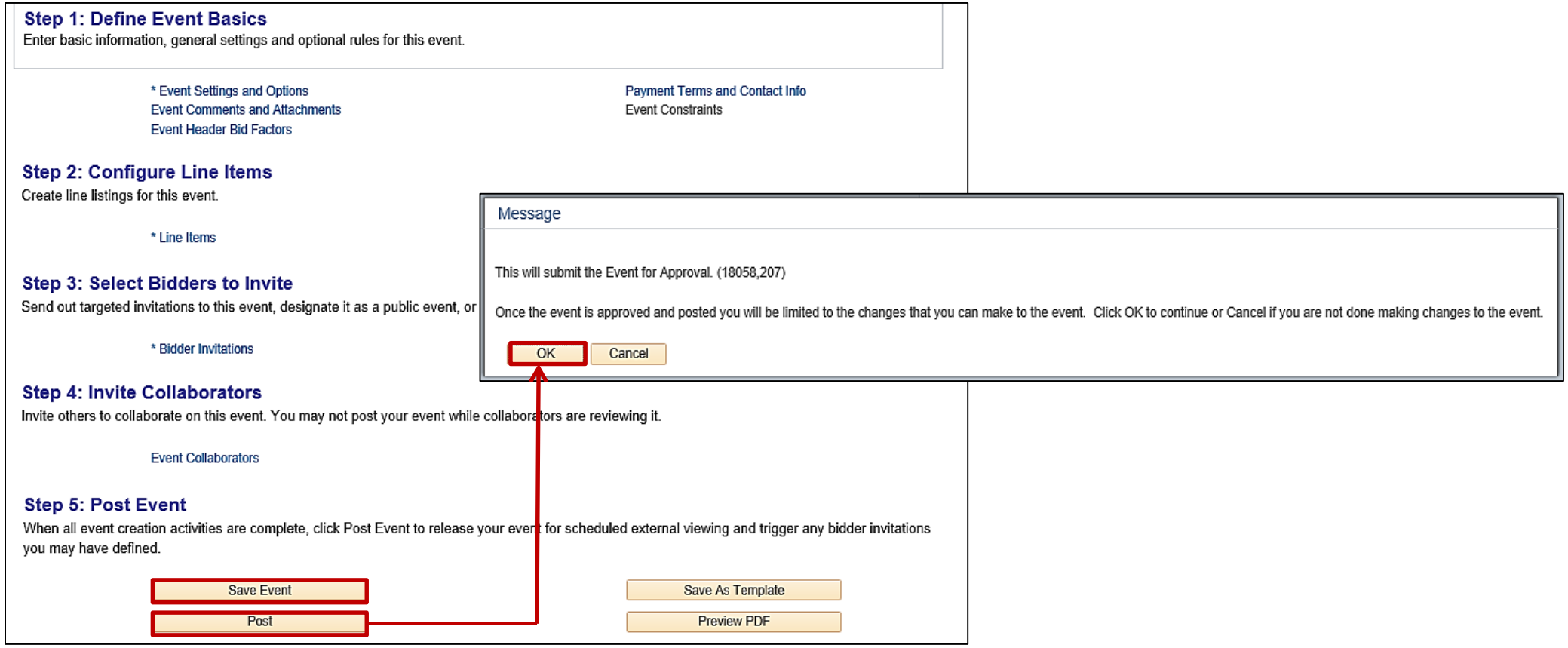
Change an Event: Versions (continued)

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.



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.



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:

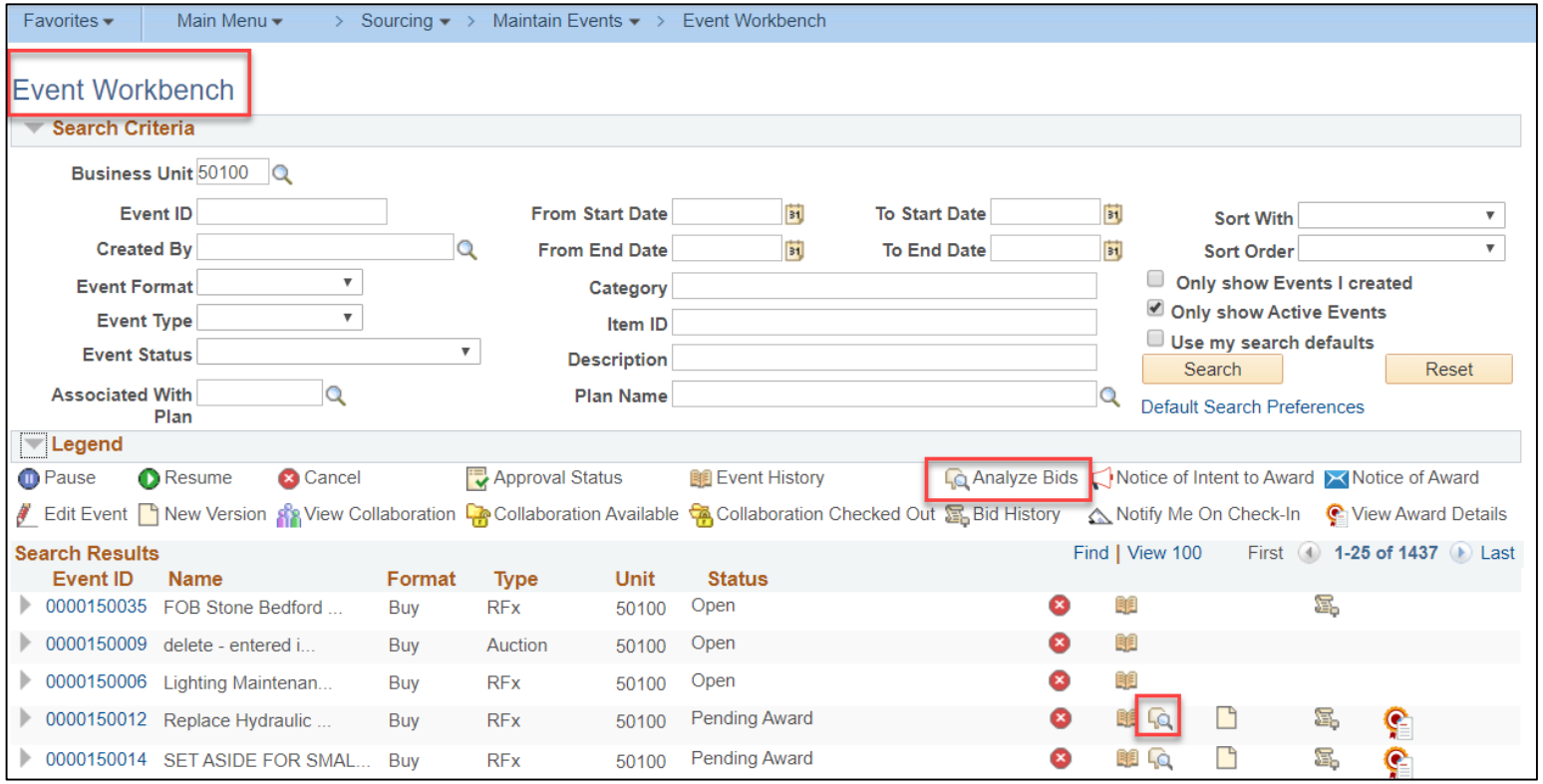
- Analyze Bid/Proposal Responses
- Collaborate on Bid/Proposal Responses (optional)
- Award and Post the Event (By Line, Group, or Grand Total)
- Create a Purchase Order/Contract
- Cancel a Purchase Order/Contract Associated to an Event

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:

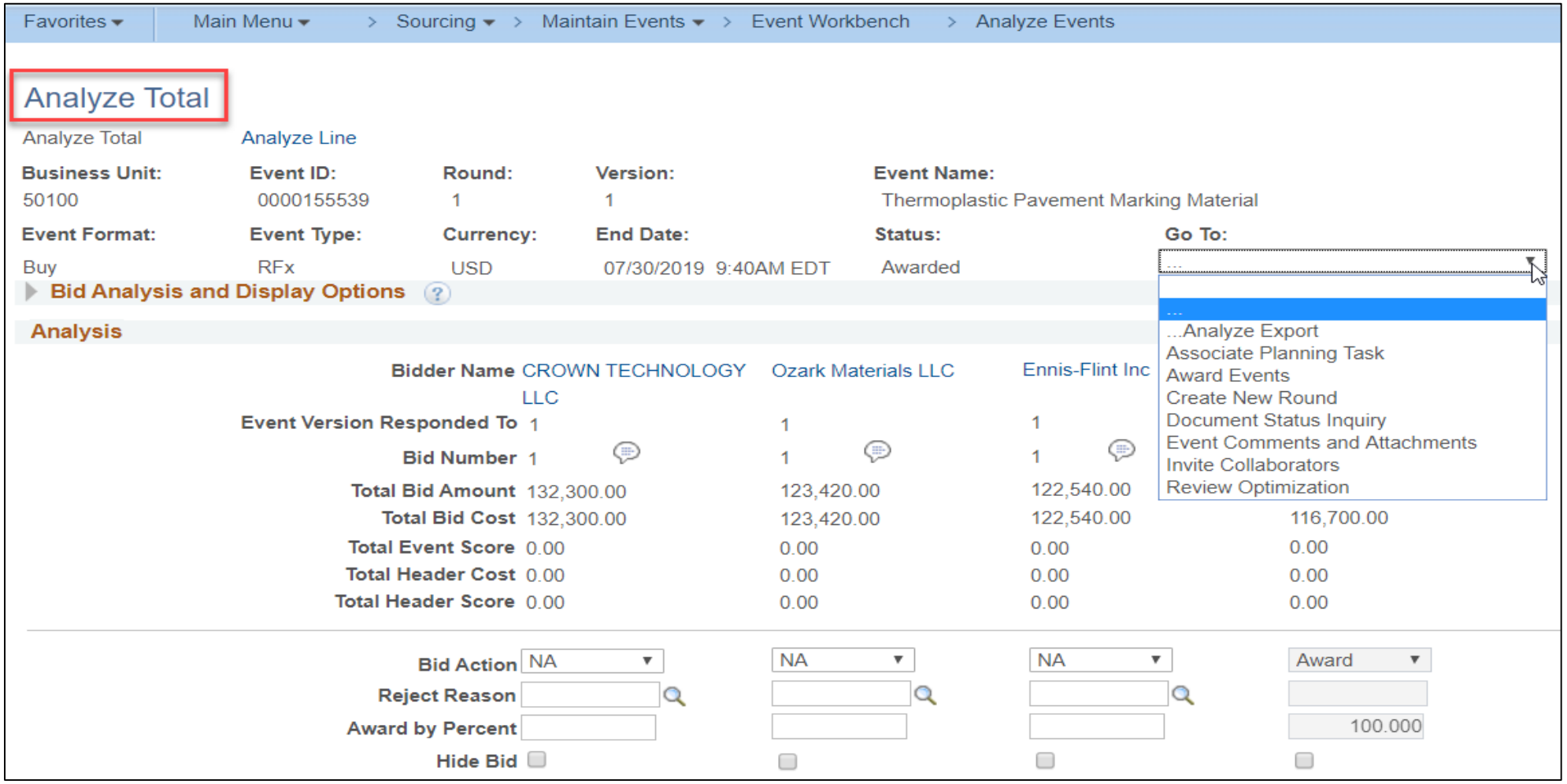
Main Menu > Sourcing > Maintain Events > Event Workbench



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.



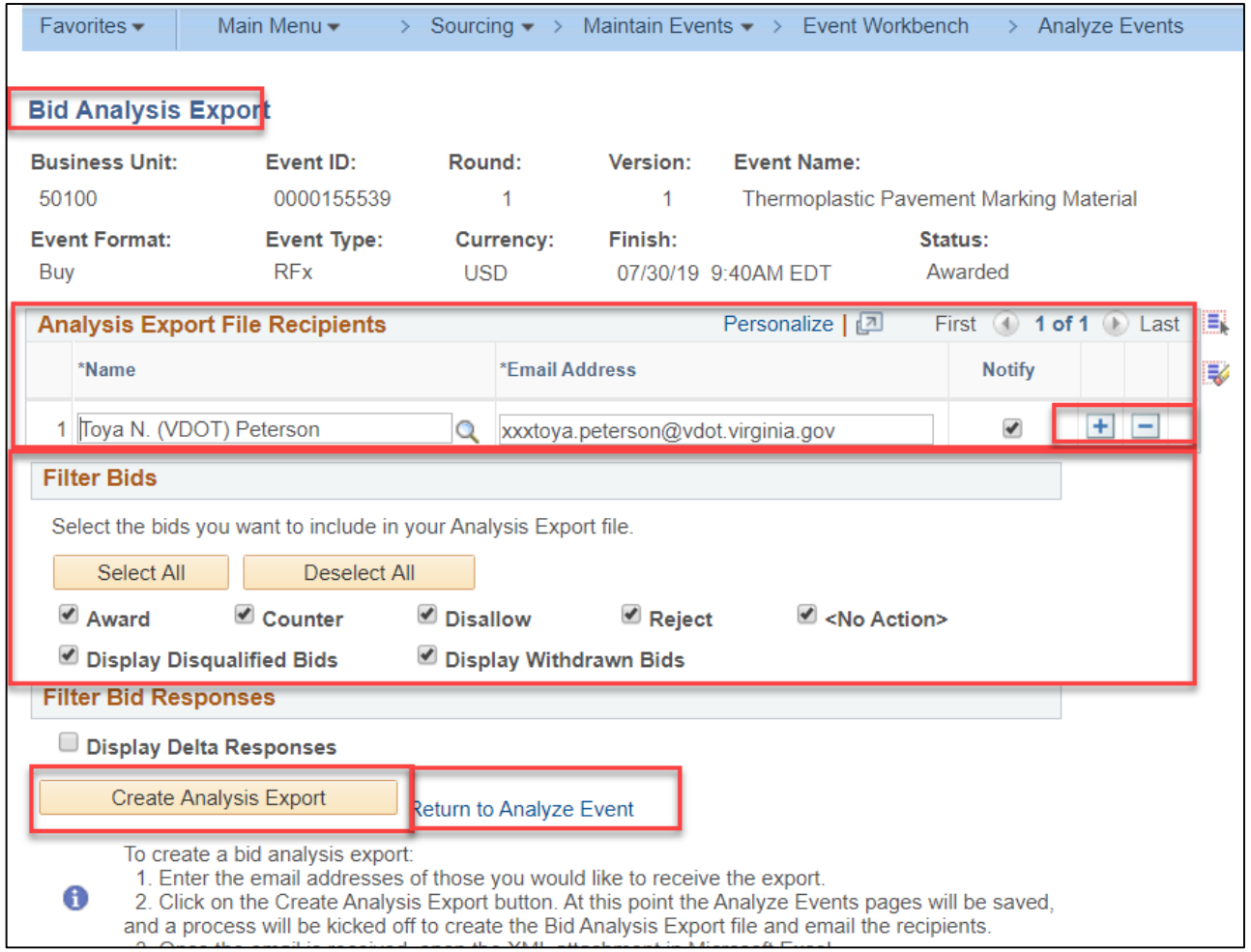
Analyze Bid/Proposal Responses (continued)

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

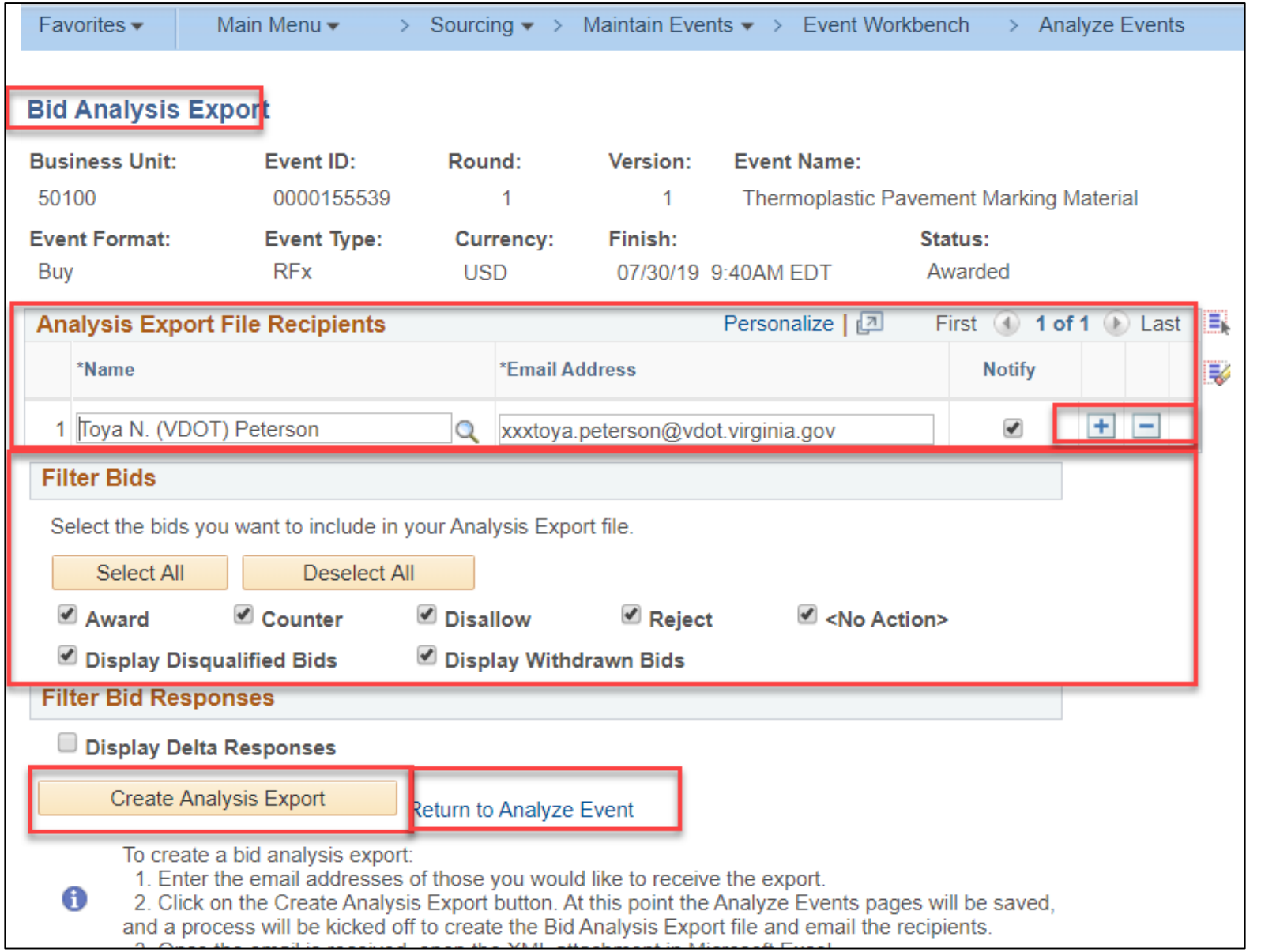
- Click the **+ / -** icon to add/delete email recipients.
- In the **Filter Bids** section, choose the bids to be included in the export file.
- Click **Create Analysis Export**.

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**.

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

Event Description
ROW Mowing & Litter Pick Up Services for the Richmond Interstate Maintenance Office and areas within the Salem Residency

General Comments
- ATTACHMENT L

- ASD-30

- ATTACHMENT L

- ASD-30

- ATTACHMENT L

- ASD-30

- ASD-30

- Attachment L

Bidder Name	rican General Contractor	Quick Cleaning System	Meador Farms Inc	BUSHWHACKERS INC
Event Version:	4	4	4	4
Bid Number:	1	1	1	1
Total Bid Amount:	27644.7	63279.34	31461.255	1240216.688
Total Event Score:	100.002	78.0551	41.1701	0
Award By Percent				

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

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

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

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

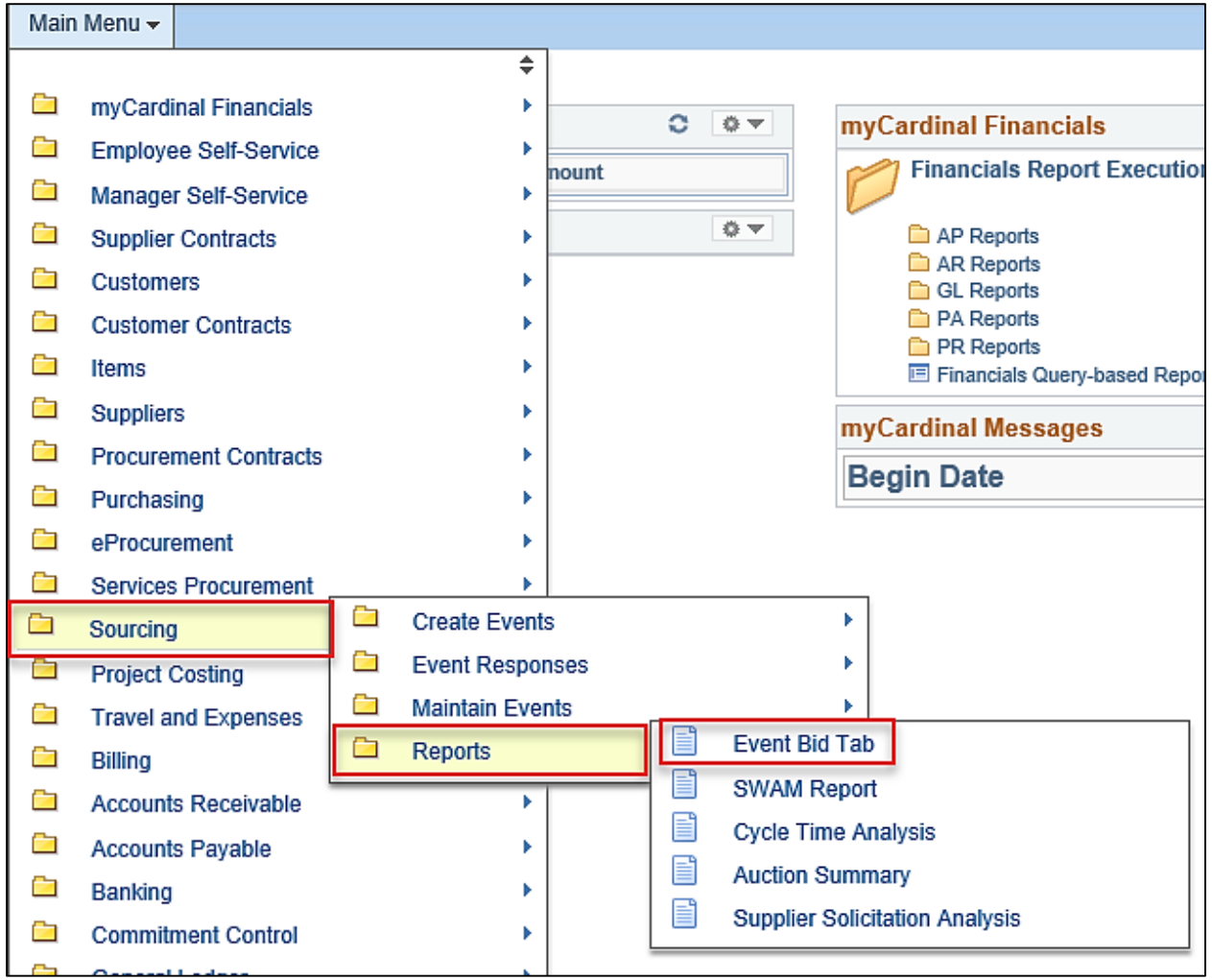
Quantity Details	Requested
Minimum Quantity:	0
Unit of Measure:	ACR

Bidder Name	erican General Contractors	Quick Cleaning Systems	Meador Farms Inc	BUSHWHACKERS INC
Event Version:	4	4	4	4
Bid Number:	1	1	1	1
Line Bid Quantity:	10	10	10	10
Total Line Bid Amount:	4500	0	0	0
Total Line Score:	100	0	0	0
Unit Bid Price:	450	0	0	0
Score:	100	0	0	0
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)

CARDINAL

Report ID: VRPR008

Commonwealth of Virginia
Department of Transportation
BID TABULATION REPORT

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

Business Unit: 50100
Event ID: 0000150024

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	

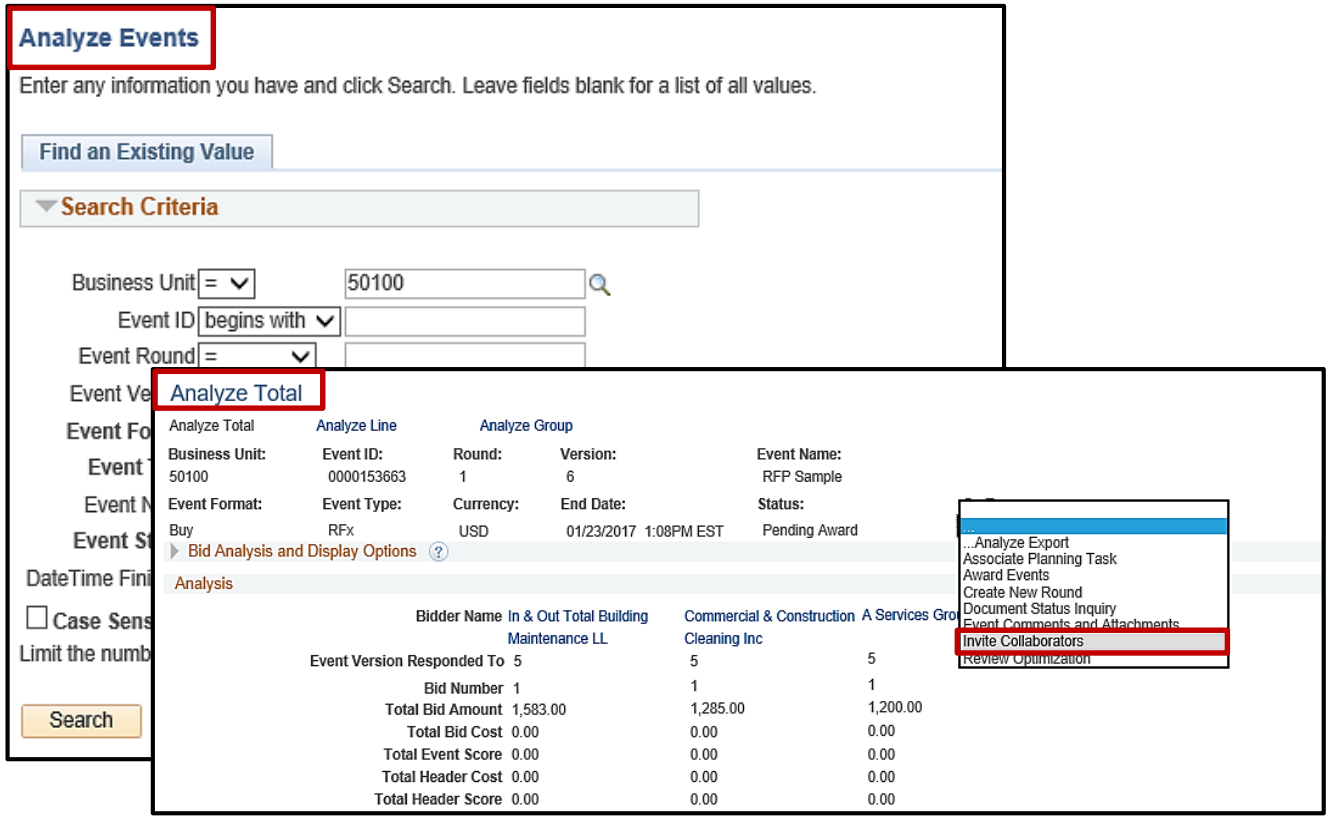
Collaborate on Bid/Proposal Responses

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

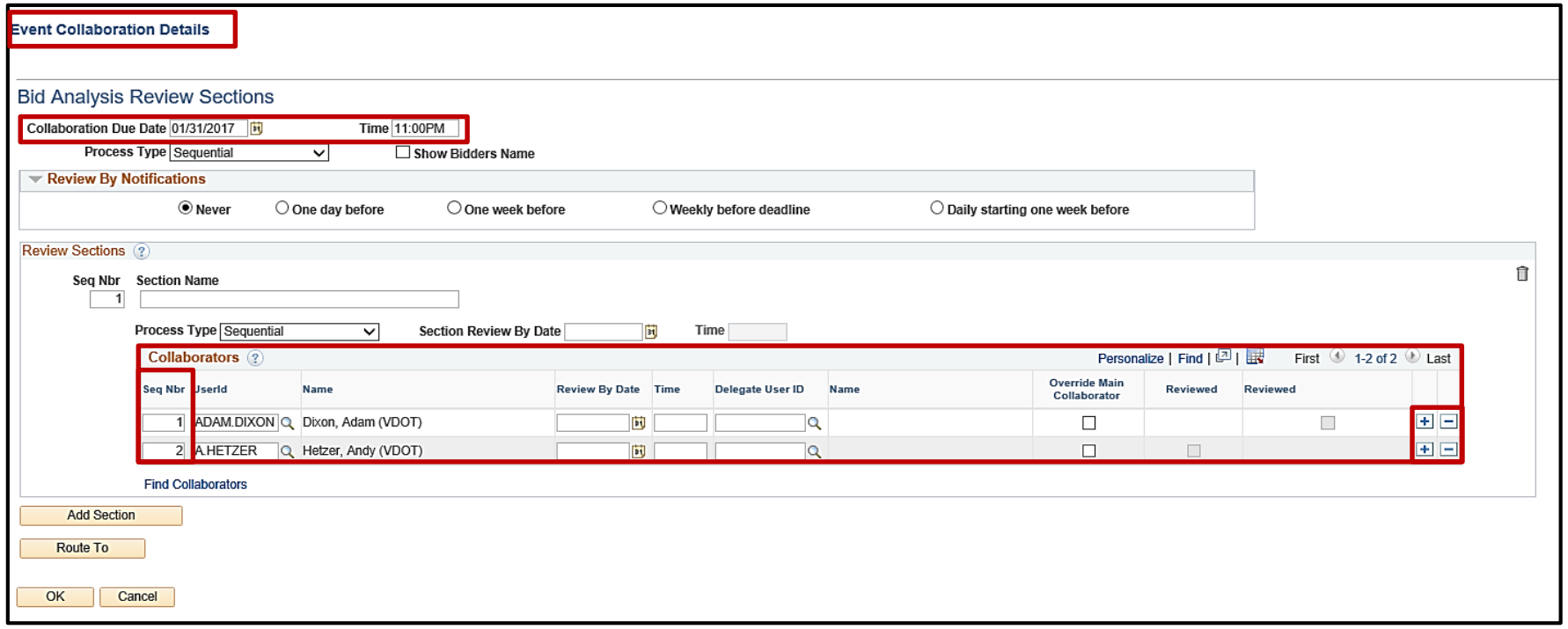
- Enter the event search criteria.
- Select the event for collaboration. The **Analyze Total** page will display.
- Click on the **Go To** box drop-down arrow and select **Invite Collaborators**. The **Event Collaboration Details** page will be displayed.



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 **Training**.

Award and Post the Event

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

Award bids by:

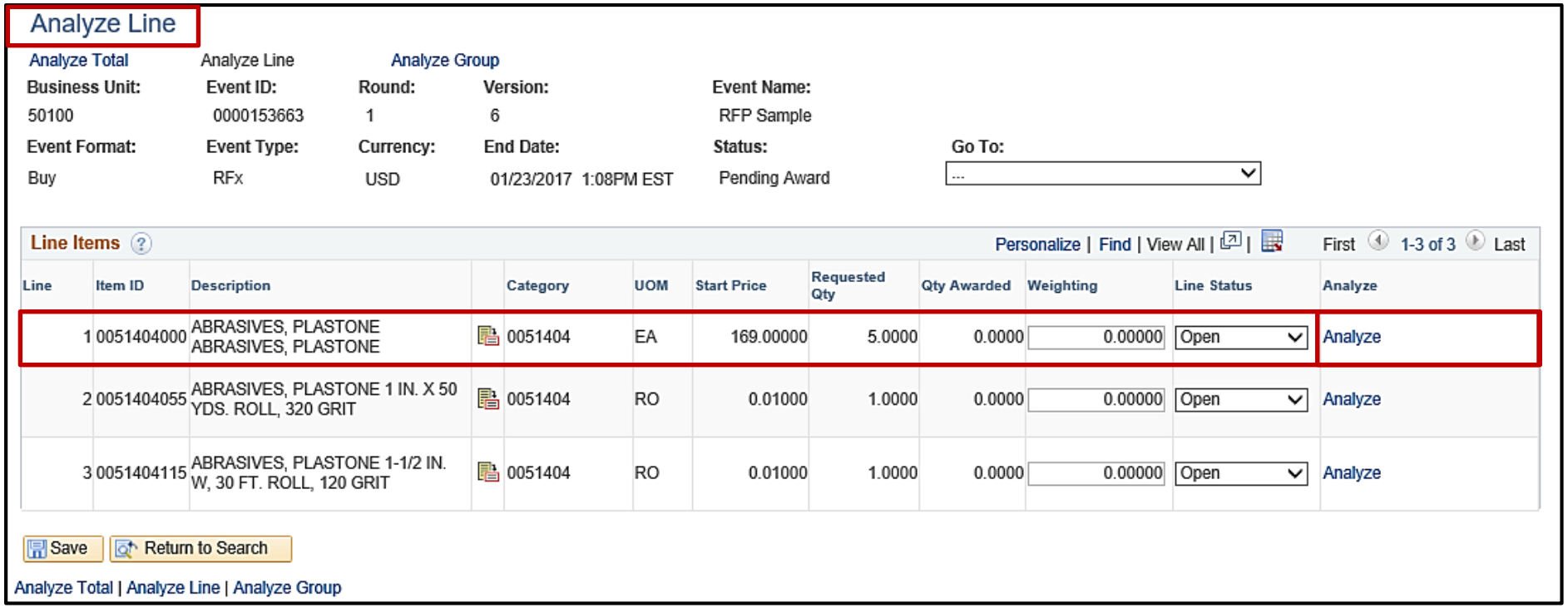
- Line: use to award different lines to different suppliers
- Group: if specific line items were configured into groups that are to be awarded based on location, similar items, etc. in the **Configure Line Items** portion of the event
- Total: use to award the entire bid/proposal to one bidder

Award and Post the Event: By Line

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

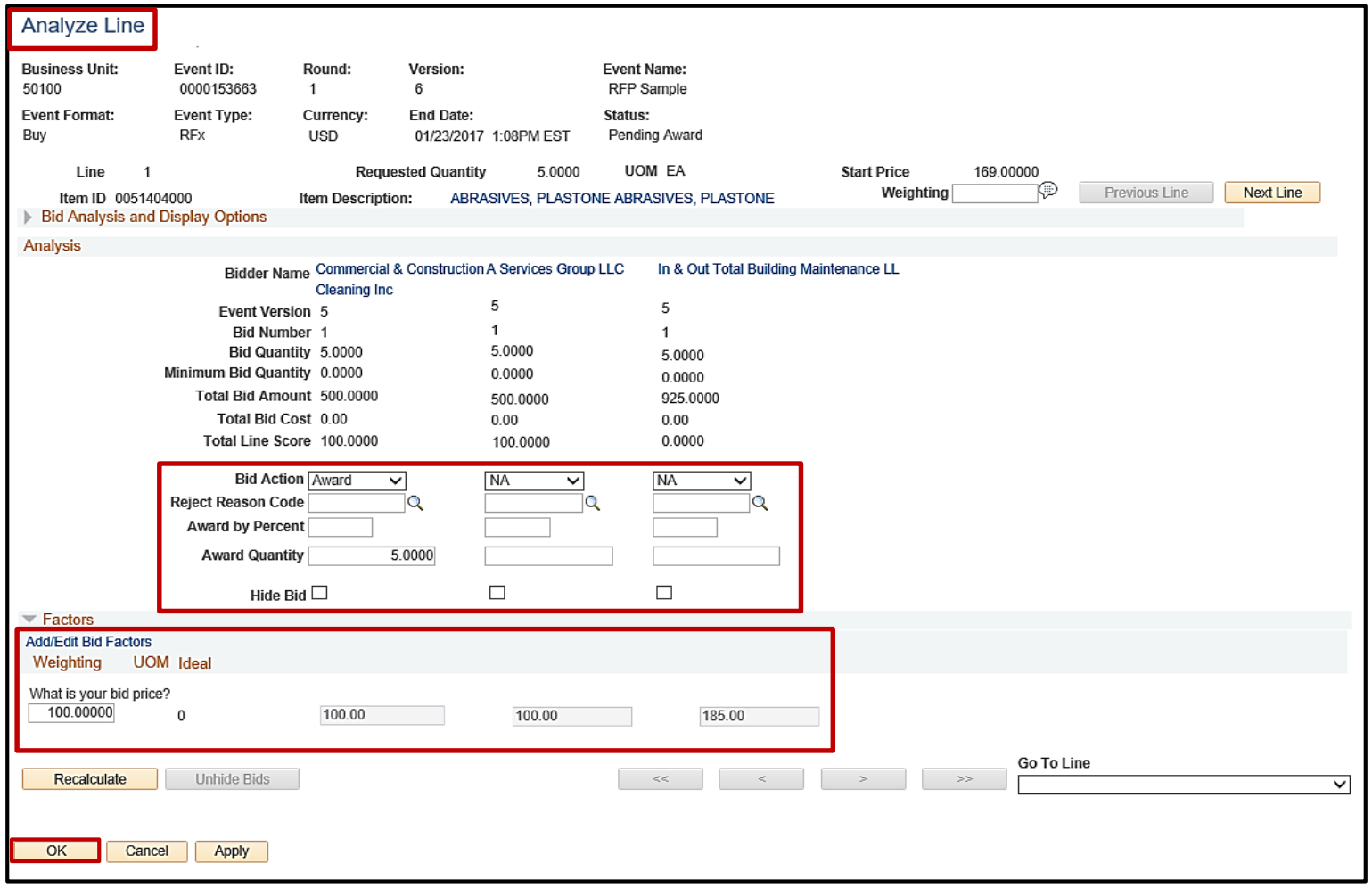
Main Menu > Sourcing > Maintain Events > Analyze Events

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.



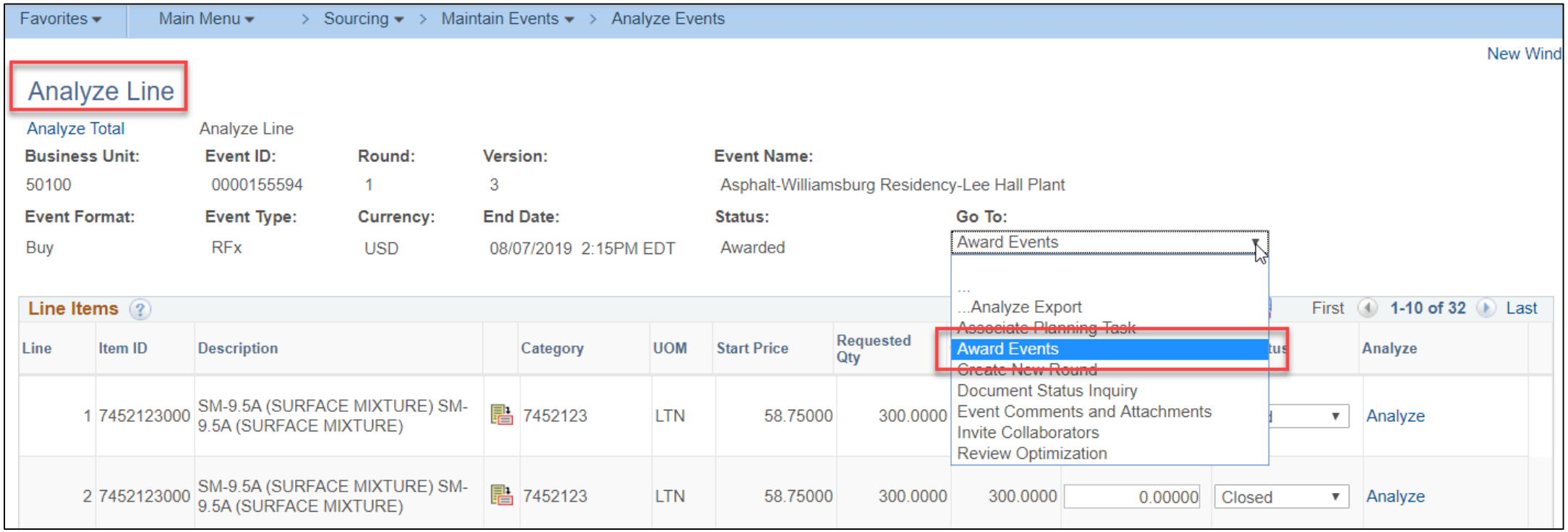
Award and Post the Event: By Line (continued)

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**.



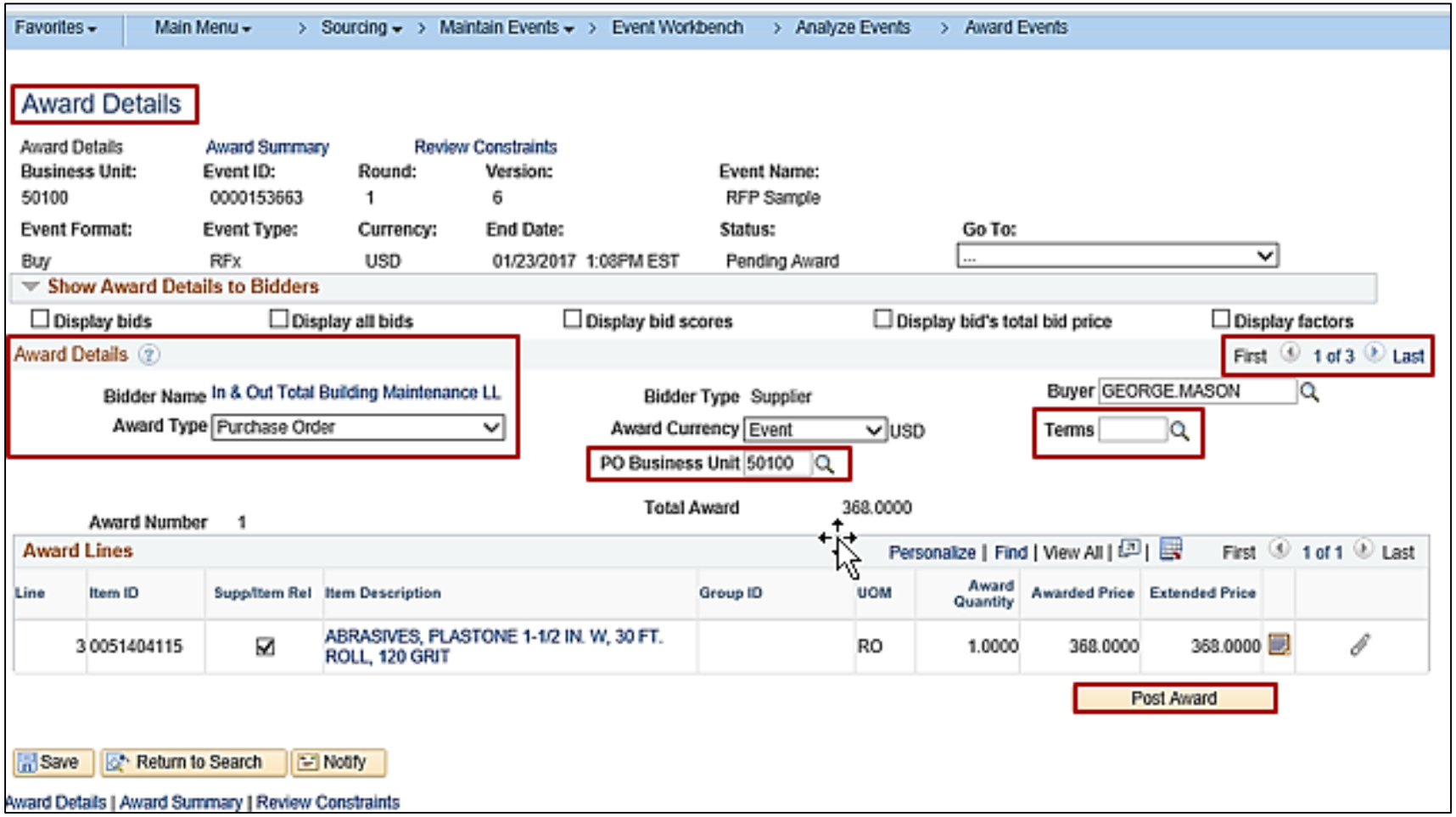
Award and Post the Event: By Line (continued)

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 and Post 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**.



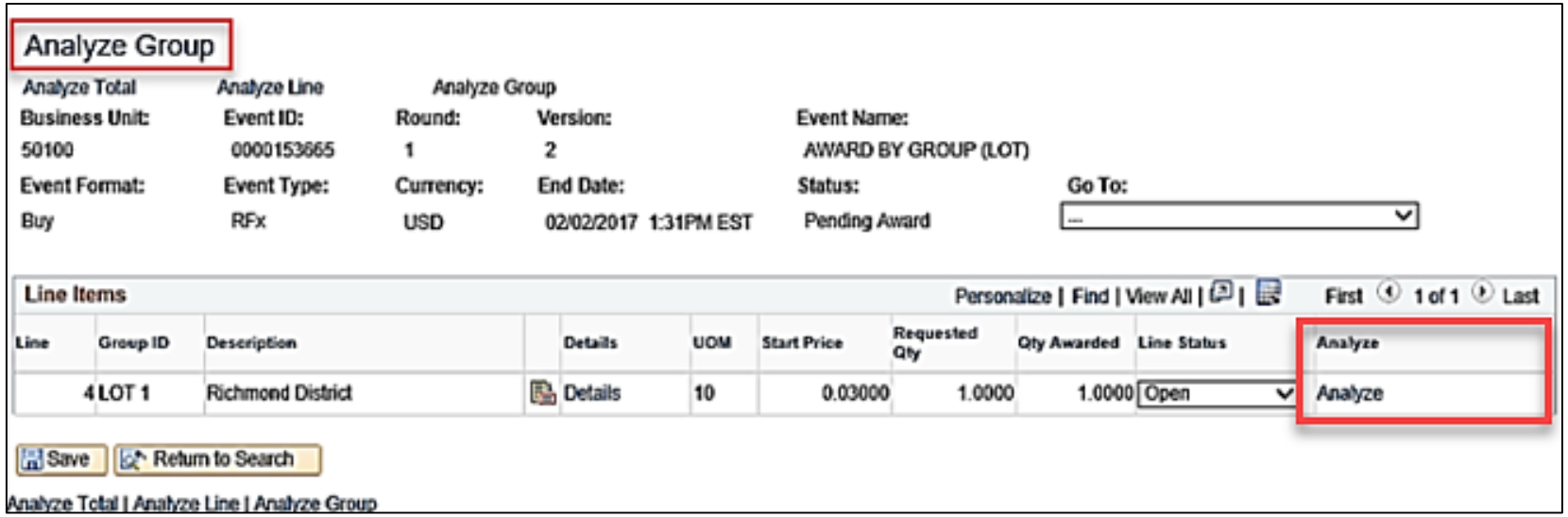
Award and Post the Event: By Group (Lot)

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 :

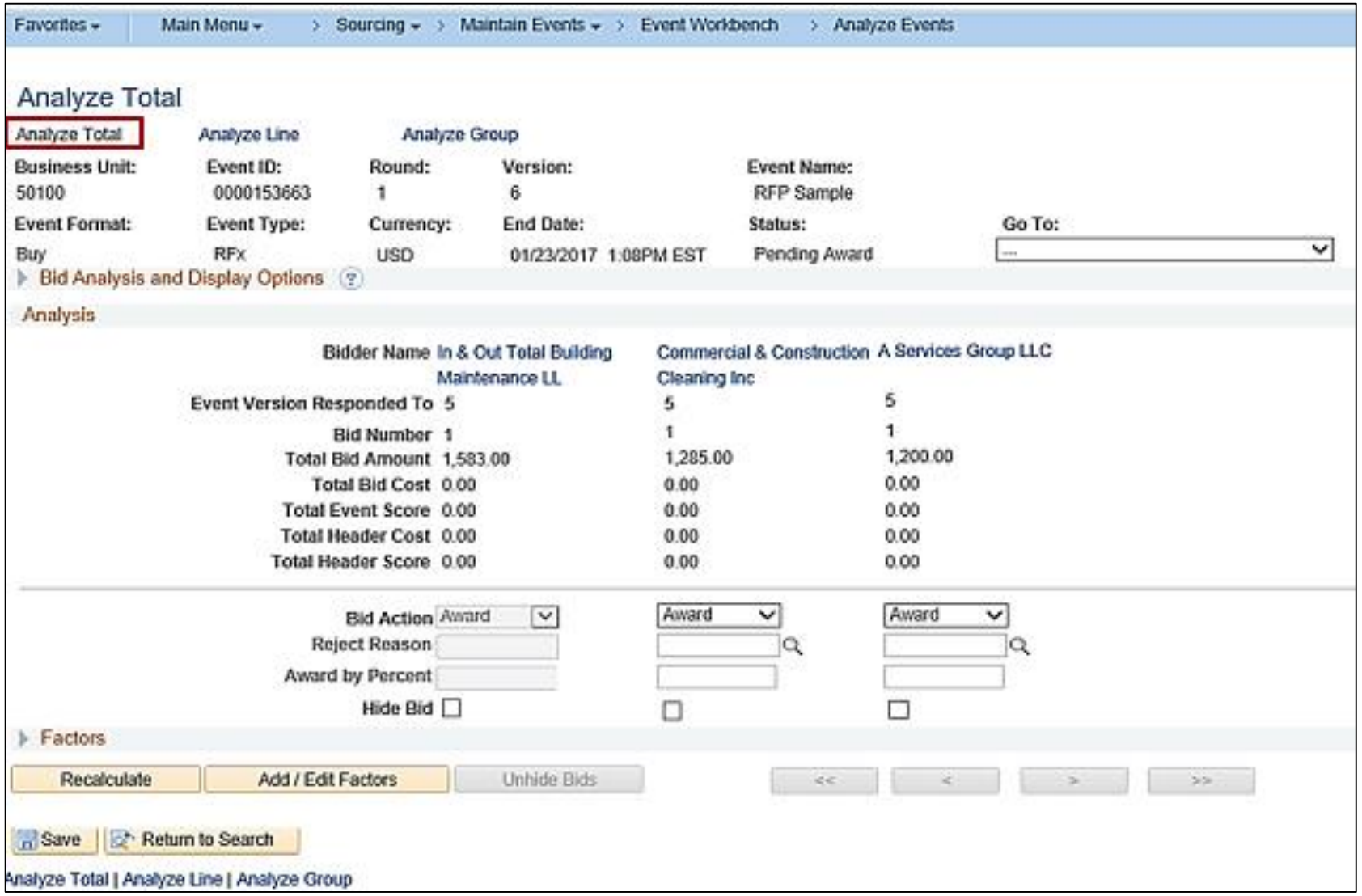
Main Menu > Sourcing > Maintain Events Analyze Events

- 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 and Post 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.



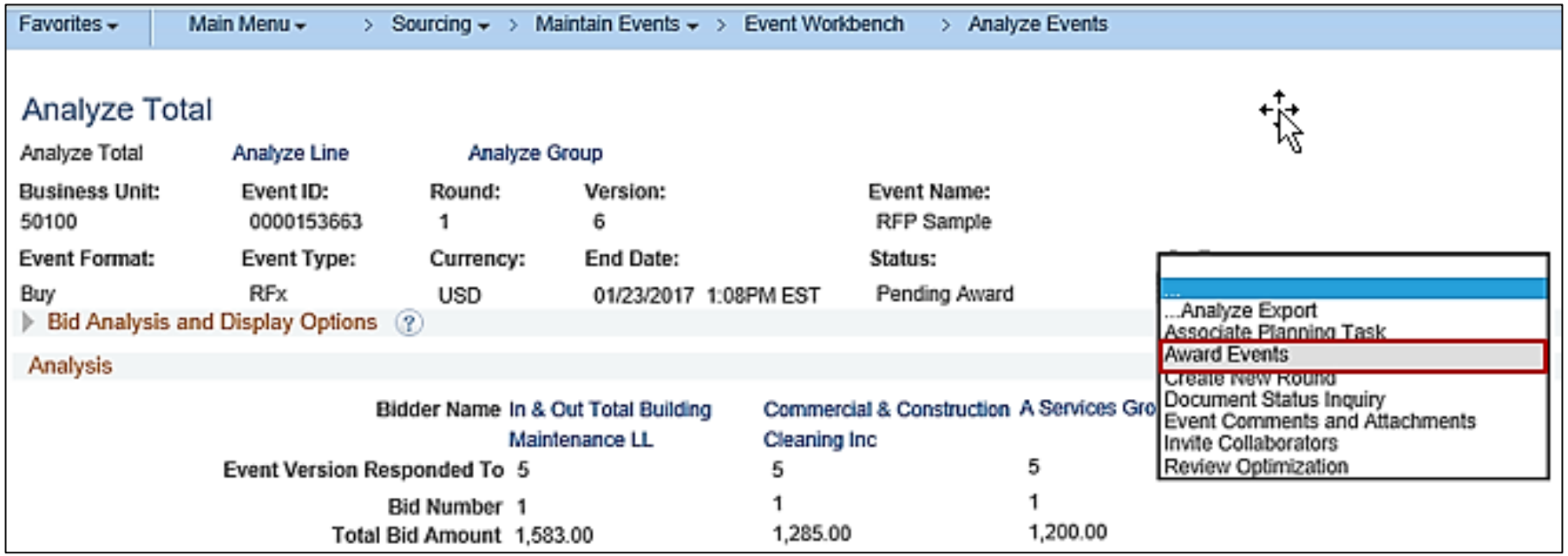
Award and Post the Event: Post the Award

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

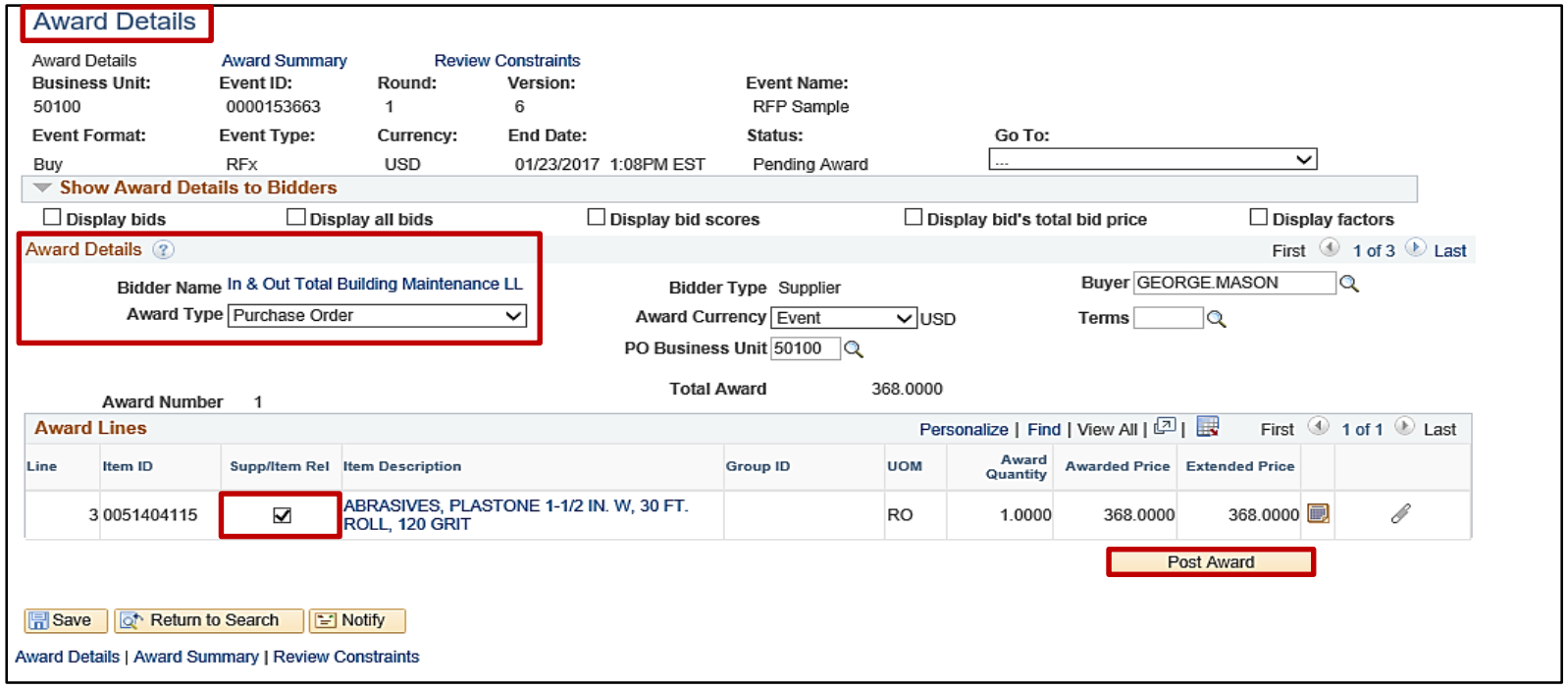


Award and Post the Event: Post the Award (continued)

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.

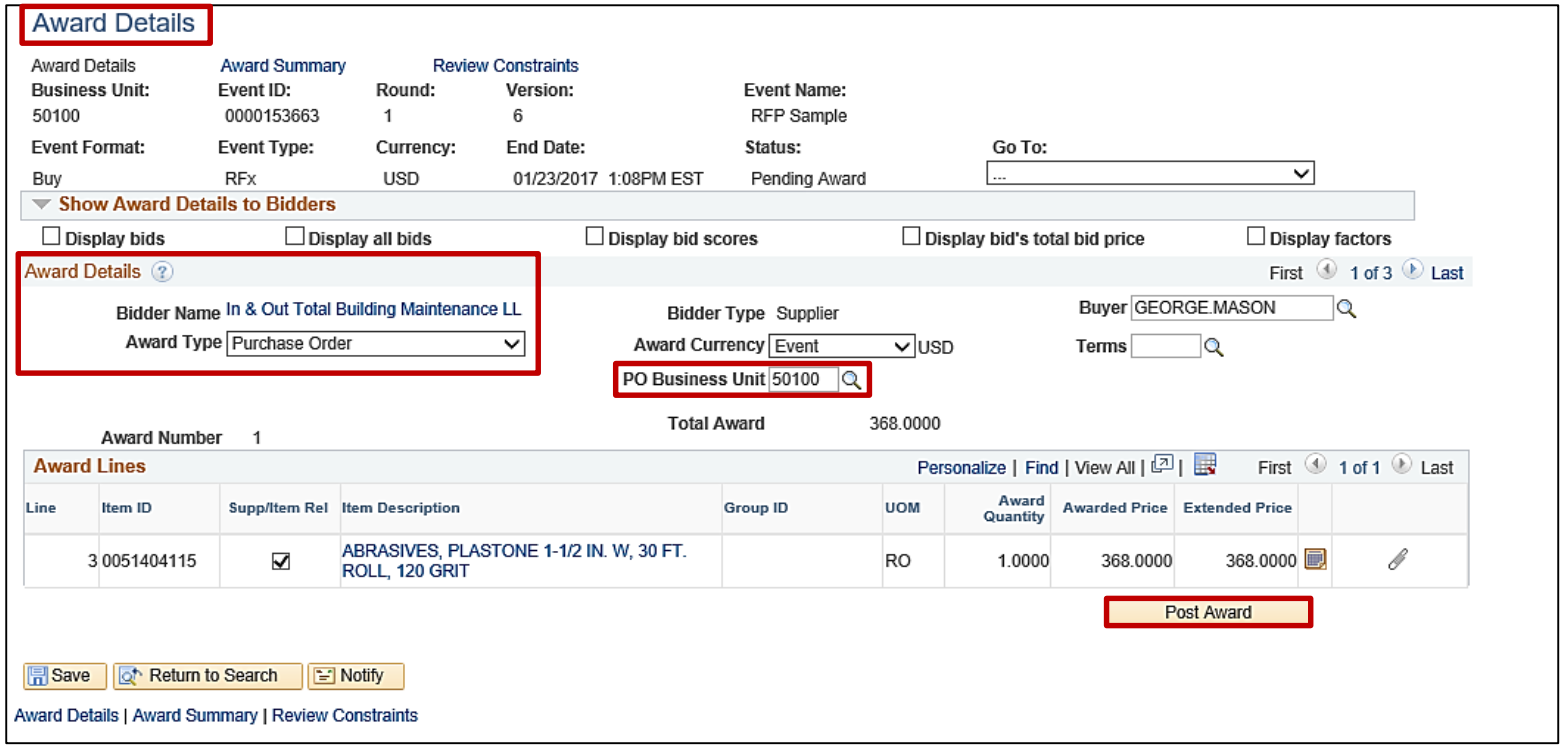


Create a Purchase Order/Contract: Award to Purchase Order

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 **Training**.



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

Award Details

Award Details | Award Summary | Review Constraints

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	---

Show Award Details to Bidders

☐ Display bids ☐ Display all bids ☐ Display bid scores ☐ Display bid's total bid price ☐ Display factors

Award Details

First 1 of 3 Last

Bidder Name: In & Out Total Building Maintenance LL

Award Type: Purchase Order

Bidder Type: Supplier

Award Currency: Event USD

PO Business Unit: 50100

Buyer: GEORGE.MASON

Terms:

Total Award: 368.0000

Award Number: 1

Award Lines

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

Line	Item ID	Supp/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price
3	0051404115	☑	ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT		RO	1.0000	368.0000	368.0000

Post Award

Save | Return to Search | Notify

Award Details | Award Summary | Review Constraints

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

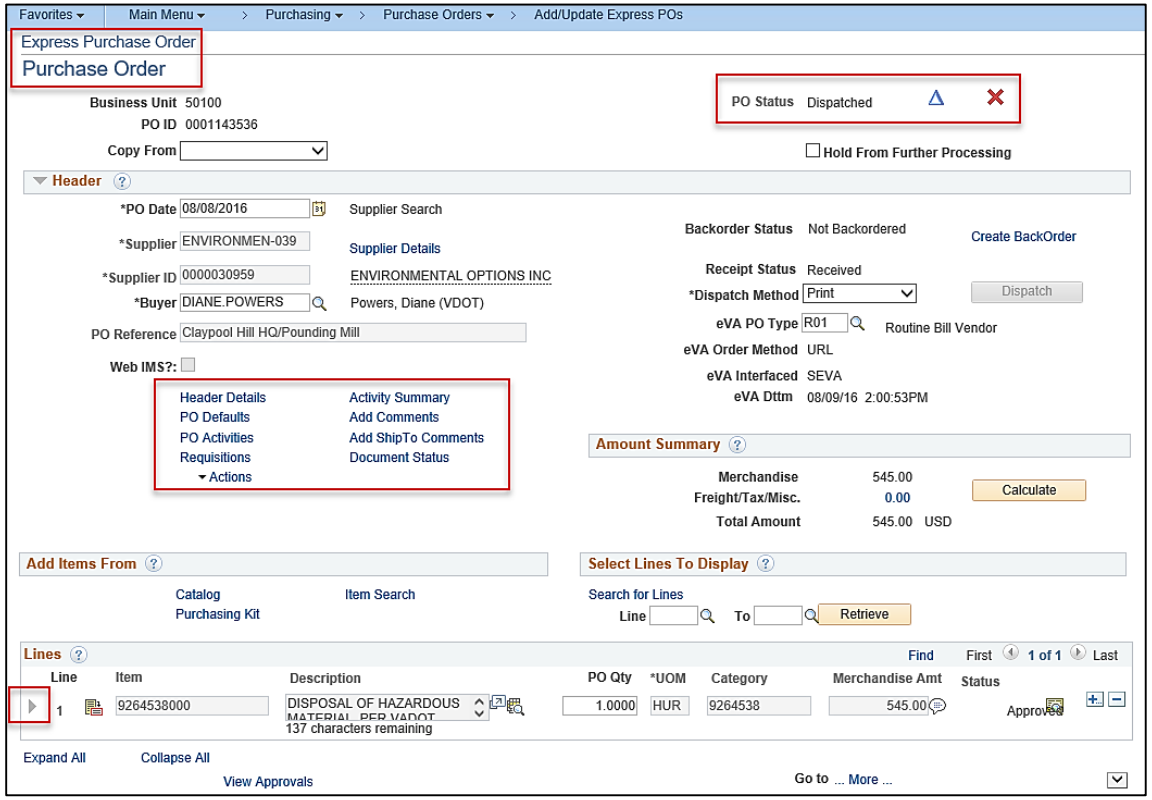
Once **Purchase Order** is selected as the **Award Type** and click **Post Award**, the **Express Purchase Order** page displays.

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)

Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update Express POs

Express Purchase Order

Purchase Order

Business Unit 50100

PO ID 0001143536

Copy From

PO Status Dispatched

Hold From Further Processing

Header

*PO Date 08/08/2016 Supplier Search

*Supplier ENVIRONMEN-039 Supplier Details

*Supplier ID 0000030959 ENVIRONMENTAL OPTIONS INC

*Buyer DIANE.POWERS Powers, Diane (VDOT)

PO Reference Claypool Hill HQ/Pounding Mill

Web IMS?:

Backorder Status Not Backordered Create BackOrder

Receipt Status Received

*Dispatch Method Print Dispatch

eVA PO Type R01 Routine Bill Vendor

eVA Order Method URL

eVA Interfaced SEVA

eVA Dttm 08/09/16 2:00:53PM

Header Details | Activity Summary
PO Defaults | Add Comments
PO Activities | Add ShipTo Comments
Requisitions | Document Status
Actions

Amount Summary

Merchandise	545.00	
Freight/Tax/Misc.	0.00	
Total Amount	545.00	USD

Calculate

Add Items From

Catalog | Item Search
Purchasing Kit

Select Lines To Display

Search for Lines

Line To Retrieve

Lines Find First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1	9264538000	DISPOSAL OF HAZARDOUS MATERIAL PER VADOT 137 characters remaining	1.0000	HUR	9264538	545.00	Approved

Expand All Collapse All

View Approvals

Go to ... More ...

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 **Training**.

Award Details

Award Details | Award Summary | Review Constraints

Business Unit:	Event ID:	Round:	Version:	Event Name:
50100	0000150757	1	2	FOB Stone for Wise Residency

Event Format:	Event Type:	Currency:	End Date:	Status:	Go To:
Buy	RFx	USD	01/10/2013 2:40PM EST	Awarded	...

Show Award Details to Bidders

☐ Display bids ☐ Display all bids ☐ Display bid scores ☐ Display bid's total bid price ☐ Display factors

Award Details — First 1 of 1 Last

Bidder Name: Jessee Stone Co
Bidder Type: Supplier
Buyer: CAROLYN.WISDOM
Award Type: Procurement Contract
Award Currency: Event USD
Terms: 30
*Contract Style: Purchase Order
PO Business Unit: 50100
Contract ID: 00000000000000000000041260
Total Award: 253,970.0000
Award Number: 1

Award Lines — Personalize | Find | View All | First 1-10 of 12 Last

Line	Item ID	Supp/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price
1	7503548480	☑	STONE, CRUSHED GRADE 25		LTN	10,000.0000	9.4000	94,000.0000
2	7503532045	☑	STONE NO. 8, STONE		LTN	2,500.0000	8.4000	21,000.0000
3	7503532020	☑	STONE NO. 1, STONE		LTN	3,500.0000	9.4000	32,900.0000
4	7503548440	☑	STONE, CRUSHED GRADE 9 CRUSHED STONE		LTN	1,000.0000	9.9000	9,900.0000

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

Award Details

Award Details | Award Summary | Review Constraints

Business Unit:	Event ID:	Round:	Version:	Event Name:
50100	0000150757	1	2	FOB Stone for Wise Residency

Event Format:	Event Type:	Currency:	End Date:	Status:	Go To:
Buy	RFx	USD	01/10/2013 2:40PM EST	Awarded	...

Show Award Details to Bidders

☐ Display bids ☐ Display all bids ☐ Display bid scores ☐ Display bid's total bid price ☐ Display factors

Award Details (?) First 1 of 1 Last

Bidder Name Jessee Stone Co

Bidder Type Supplier

Buyer CAROLYN.WISDOM

Award Type Procurement Contract

Award Currency Event USD

Terms 30

*Contract Style Purchase Order

PO Business Unit 50100

Contract ID 0000000000000000000041260

Total Award 253,970.0000

Award Number 1

Award Lines

Personalize | Find | View All | First 1-10 of 12 Last

Line	Item ID	Supp/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price
1	7503548480	☑	STONE, CRUSHED GRADE 25		LTN	10,000.0000	9.4000	94,000.0000
2	7503532045	☑	STONE NO. 8, STONE		LTN	2,500.0000	8.4000	21,000.0000
3	7503532020	☑	STONE NO. 1, STONE		LTN	3,500.0000	9.4000	32,900.0000
4	7503548440	☑	STONE, CRUSHED GRADE 9 CRUSHED STONE		LTN	1,000.0000	9.9000	9,900.0000

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

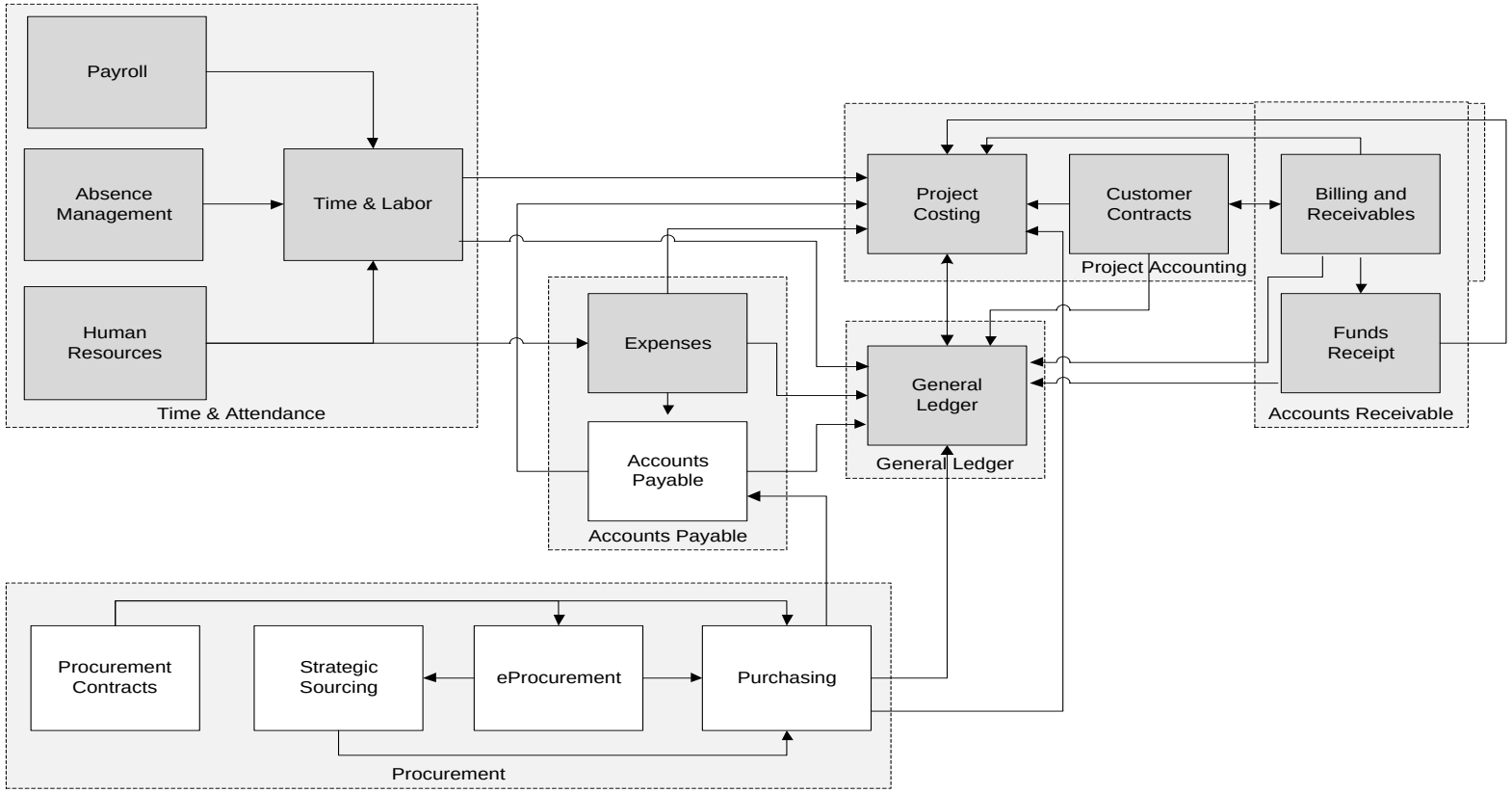
Event Statuses

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:

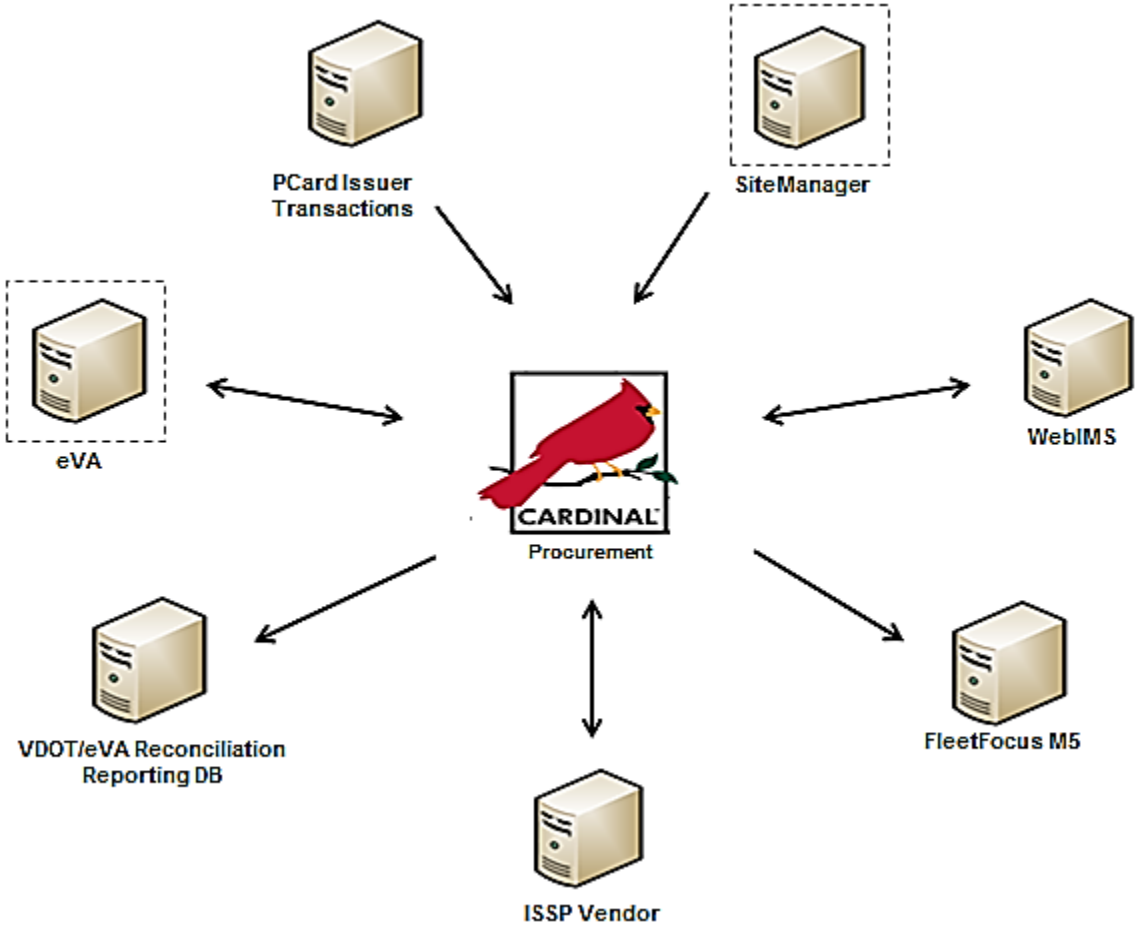
- After an event is awarded, either a PO or contract is issued. These items integrate with future requisitions, POs, contracts, and PCards.



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.	Start	Indicates point at which the process begins. Does not represent any activity.
Batch Process	Specifies a batch process.	End	Indicates point at which the process ends. Does not represent any activity.
Manual Operation	Depicts a process step that is preformed manually.	Document	Depicts a document of any kind, either electronic or hard copy.
Decision Outcome	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.	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.
Entity Name	Represents an entity (person, organization, etc.).	Step/ Process	Connects steps between business processes.