



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

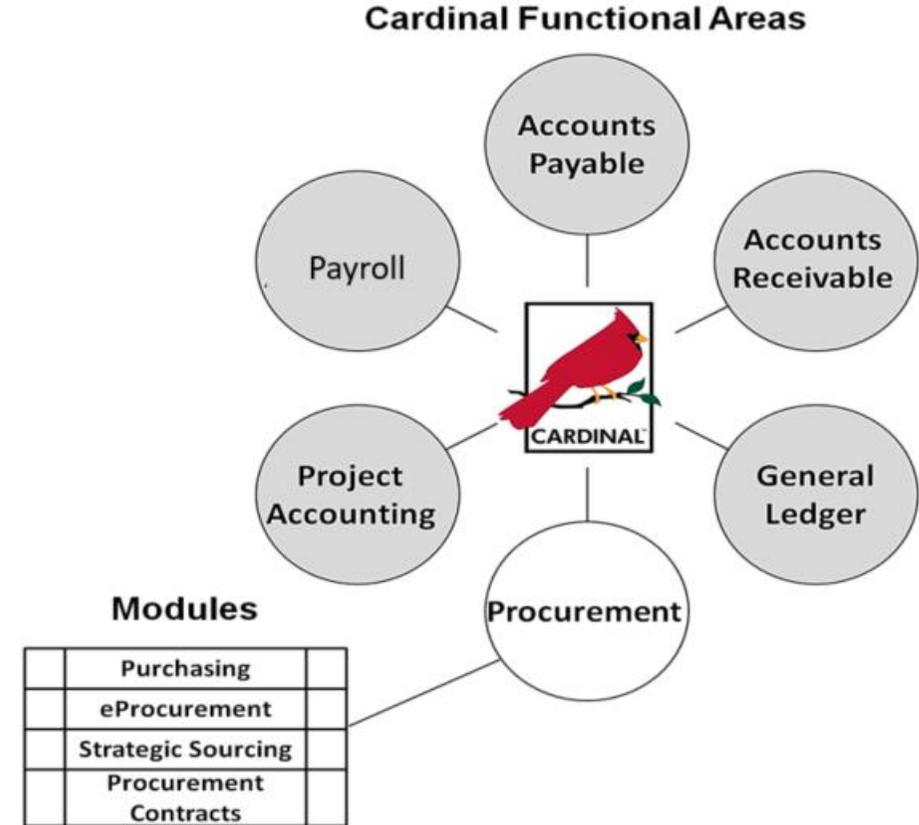
Like Purchasing, the eProcurement module provides for Procurement but is web-based. It is similar to an online shopping cart experience for users requesting goods and/or services.

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.





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.

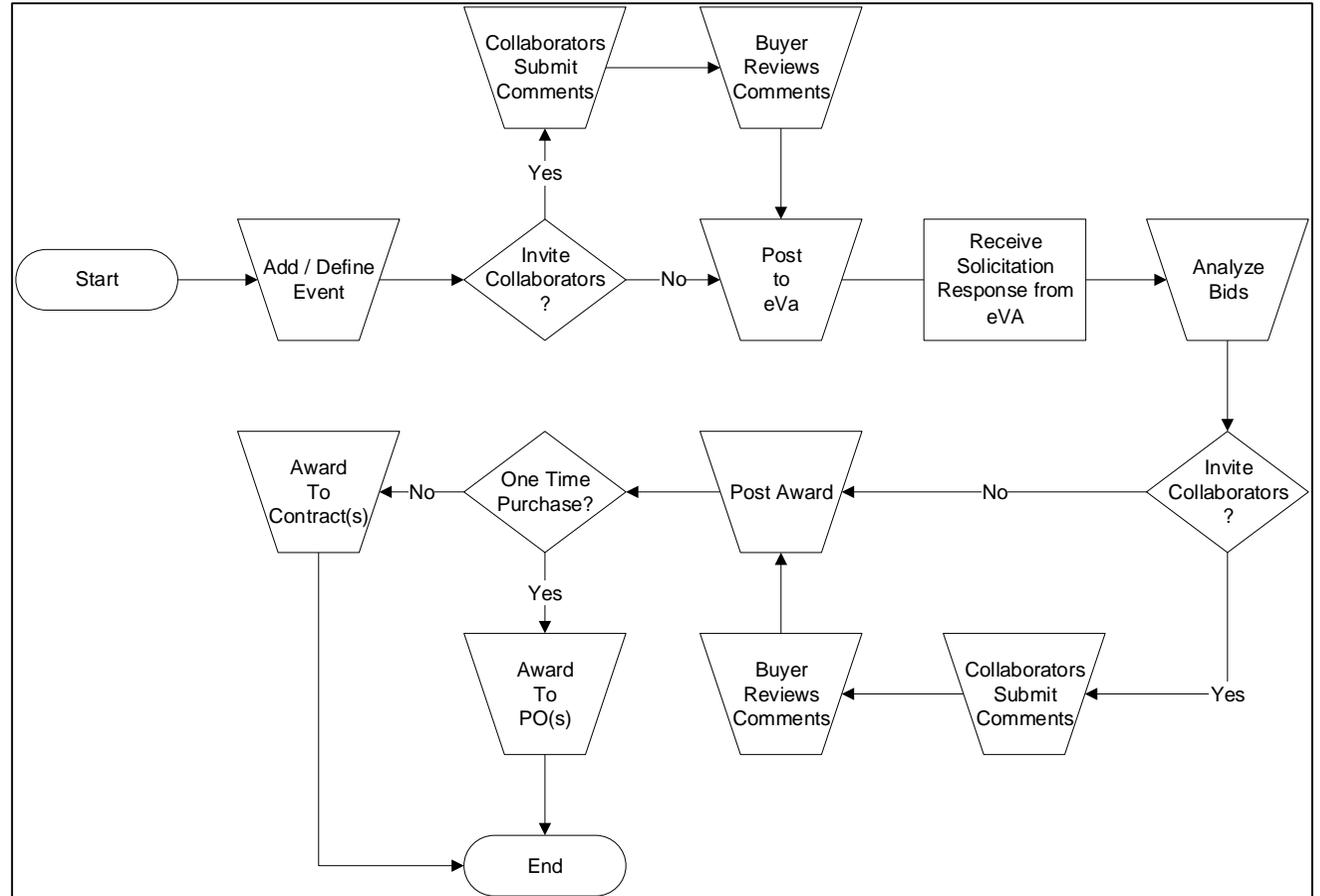


Strategic Sourcing Overview

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:

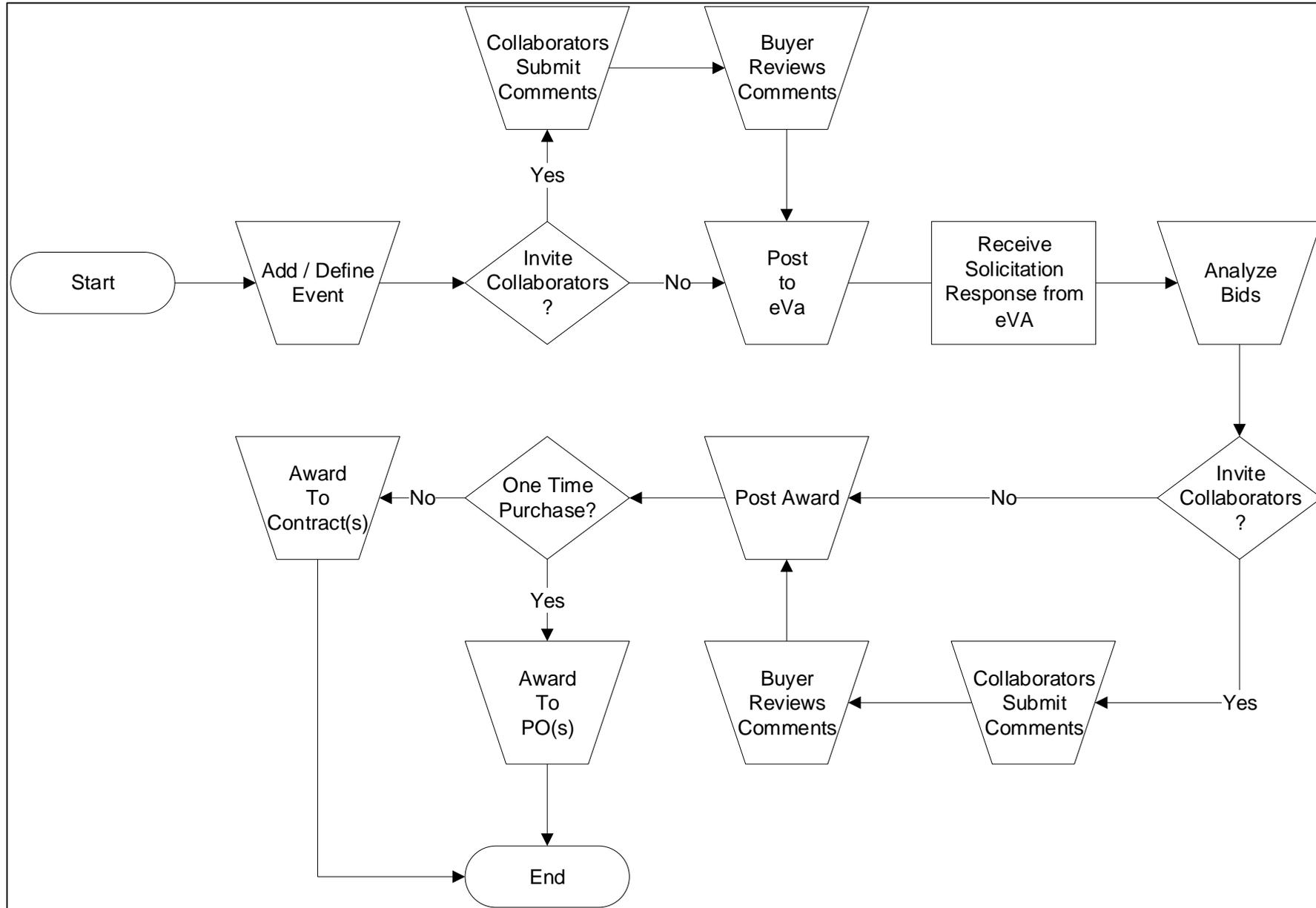
- Add/Define Event
- Event Collaboration*
- Receive and Enter Solicitation Response(s)
- Analyze Bid Response(s)
- Response Collaboration*
- Award to Contract(s) or Purchase Order(s)



*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**.

The screenshot shows the 'Create Events' page with the following elements:

- Navigation path: Favorites > Main Menu > Sourcing > Create Events > Event Details
- Tab: **Create Events** (highlighted with a red box)
- Buttons: [Find an Existing Value](#) and [Add a New Value](#) (highlighted with a red box)
- Form fields:
 - Business Unit: 50100
 - Event ID: NEXT
 - Event Round 1: (empty)
 - Event Version 1: (empty)
 - Event Format: Buy (dropdown menu)
 - Event Type: RFx (dropdown menu)
 - Proxy Bidding (Auctions Only): Disabled (dropdown menu)
- Button: **Add** (highlighted with a red box)
- Footer: [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.



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.

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.

Event Summary

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

Event Type RFx Change to Auction

Event Status Open

*Solicitation Type :

*Event Name

Description RFP Sample Description

Time Zone EST

Preview Date 12/11/2019 Time 12:41PM

Start Date 12/25/2019 Time 12:41PM

End Date 01/04/2020 Time 12:41PM

Copy From

Preview By

- Contract
- Delimited File
- Item Master
- Purchase Order
- Request For Information
- Requisition
- Sourcing Event
- Sourcing Template
- Event Constraints

Item Line Defaults

both.

Return

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 Post Save As Template Preview PDF



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.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

- * Event Settings and Options
- Event Comments and Attachments
- Event Header Bid Factors
- Payment Terms and Contact Info
- Event Constraints

Step 2: Configure Line Items

Create line listings for this event.

- * Line Items
- Item Line Defaults

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

- * Bidder Invitations

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

- Event Collaborators

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.



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.

Create an Event

Event Settings and Options

Business Unit 50100 Event ID 0000155947 Round 1 Version 1 Event Format Buy Event Type RFX

Create PDF on Event Post
 Allow Bidder XML Downloads
 Bid Required On All Lines
 Multiple Bids Allowed
 Allow Edit of Posted Bids
 Do Not Use Best Bids on New Rounds
 Display Bid Factor Ideal Value

Round/Version Display

Sealed Event
 Display Bid Factor Weightings
 Display Bid Factor Best/Worst

Factor Event Score Into Start Price

Header Weighting

Line Factor Weighting

Bidders May Create Line Groups
 Allow Price Breaks with Groups

Minimum Response and Warning

Minimum number of bid response Number of days warning prior



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 not 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.

Create an Event

Event Settings and Options

Business Unit 50100 Event ID 0000155947 Round 1 Version 1 Event Format Buy Event Type RFX

Create PDF on Event Post
 Allow Bidder XML Downloads
 Bid Required On All Lines

Multiple Bids Allowed
 Allow Edit of Posted Bids
 Do Not Use Best Bids on New Rounds
 Display Bid Factor Ideal Value

Round\Version Display

Sealed Event
 Display Bid Factor Weightings
 Display Bid Factor Best/Worst

Factor Event Score Into Start Price

Header Weighting

Line Factor Weighting

Bidders May Create Line Groups
 Allow Price Breaks with Groups

▼ **Minimum Response and Warning**

Minimum number of bid response Number of days warning prior



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.

Create an Event
Event Settings and Options

Business Unit 50100 Event ID 0000155947 Round 1 Version 1 Event Format Buy Event Type RFx

Create PDF on Event Post Round/Version Display Display Round and Version Sealed Event
 Allow Bidder XML Downloads Display Bid Factor Weightings
 Bid Required On All Lines
 Multiple Bids Allowed Display Bid Factor Best/Worst
 Allow Edit of Posted Bids
 Do Not Use Best Bids on New Rounds
 Display Bid Factor Ideal Value

Factor Event Score Into Total Score Start Price Do Not Display
Header Weighting
Line Factor Weighting

Bidders May Create Line Groups
 Allow Price Breaks with Groups

▼ **Minimum Response and Warning**
Minimum number of bid response Number of days warning prior



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

* Bidder Invitations

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

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**.

Event ID NEXT

Enter Comments ? View All First 1 of 1 Last

Comments:

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

[Add Attachment](#)

OK Cancel Refresh



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**.

The screenshot shows the 'Header Standard Comments' dialog box with the following fields and values:

- *Action: Copy Comment
- Std Type: RFP
- Comment ID: AWSR
- *Eff Date: 10/10/2019
- Description: (empty)
- Short Description: (empty)
- Comments: AWARD: Selection shall be made qualified and best suited among the evaluation factors included in the Request for Proposals. Negotiations shall be conducted. Price shall be considered. After negotiations have been conducted, the offeror which, in its award the contract to that offeror. Proposals or reject proposals at any time shall be considered void. The successful offeror shall furnish a statement of the reasons for award.

The 'Look Up Comment ID' dialog box is open, showing a search result for 'AWSR' with the description 'AWARD-STANDARD FOR RFP'. The 'OK' button is highlighted.

SetID	STATE
Standard Comment Type	RFP
Standard Comment ID	begins with
Description	begins with

Buttons: Look Up, Clear, Cancel, Basic Lookup

Search Results

View 100 First 1-8 of 8 Last

Standard Comment ID	Description
AWhR	AWRD TO OTHER THAN HIGHST RNKG
AWMR	AWARD-MULTIPLE OFFERORS RFP
AWPS	AWARD-PROFESSIONAL SERVICE-RFP
AWSR	AWARD-STANDARD FOR RFP
BACP	BID ACCEPTANCE PERIOD
BAFO	BEST AND FINAL OFFER (BAFO)
BVAW	BEST VALUE AWARD(S)
UBVA	UNSEALED BEST VALUE AWARD(S)

Buttons: OK, Cancel, Refre



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
Event Comments and Attachments
Event Header Bid Factors

Payment Terms and Contact Info
Event Constraints

Step 2: Configure Line Items
Create line listings for this event.

* Line Items
Item Line Defaults

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

* Bidder Invitations

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

Event Collaborators

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 Addr** 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**.

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

[Modify an Event](#)
[Event Contact Details](#)

Payment & Currency Information ?

*Currency Exchange Rate *Rate Type
Pay Method Rate Date
Payment Terms Allow bids in other currencies
Bill Addr Tax Exempt
Buyer Exempt ID

Event Contact ?

Contact Name
Email ID
Phone

GoTo

[< Return to Event Overview](#)



Configure Line Items

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

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

Create an Event
Event Summary

Business Unit 50100 Event ID 0000155603 Round 1 Version 1 Event Format Buy

Event Type RFX Change to Auction
Event Status Open Time Zone EST
*Solicitation Type : Request for Proposal Preview Date 12/11/2019 Time 12:41PM
*Event Name Test Start Date 12/25/2019 Time 12:41PM
Description RFP Sample Description End Date 01/04/2020 Time 12:41PM
Copy From [dropdown] 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

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



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)**

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

Create an Event
Line Items

Business Unit 50100 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type Auction

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From [] Go Filtered View All Lines and Groups

Line Items ? Personalize | Find | View All | [] [] First 1 of 1 Last

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
<input type="checkbox"/> 1	[]	[]	[]	[]	[]	[]	[]	0.00000

Event Total: 0.0000 USD Line Weighting Total: 100 % Remaining Weight: 0%

Group Selected Lines [] OK

< Return to Event Overview GoTo [] Go

Save Event Changes

Refresh Add Update/Display



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**.

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

Create an Event

Line Items

Business Unit 50100 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type Auction

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From

Line Items ? Personalize | Find | View Filtered View ... Last

Basic Definition **Advanced Definition**

Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints		
<input type="checkbox"/> 1	<input type="text"/>	<input type="text"/>	<input type="text"/> 1	STATE		Details	Bid Factors	No		<input type="button" value="+"/> <input type="button" value="-"/>

Event Total: 0.0000 USD Line Weighting Total: 100 % Remaining Weight: 0%

Group Selected Lines

[< Return to Event Overview](#) GoTo



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**.

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

Create an Event
Line Items

Business Unit 50100 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From Filtered View

Line Items ? Personalize | Find | View All | First Last

Basic Definition **Advanced Definition**

Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints			
<input type="checkbox"/> 1	<input type="text" value="5401032225"/>	4 IN. X 10 IN. CCA TREATED LUMBER	<input type="text" value="1"/>	STATE		Details	Bid Factors	No			

Event Total: 23333500.0000 USD Line Weighting Total: 100 % Remaining Weight: 0%

Group Selected Lines

< [Return to Event Overview](#) GoTo



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.

The screenshot shows the 'Event Details' page for 'Line 1'. The 'Shipping Information' section is expanded and highlighted with a red border. Within this section, the 'Due Date' (01/16/2020) and 'Ship To' (RT 288 SDM) fields are also highlighted with red boxes. The 'Ship To' field is a required field. Other visible fields include 'Requested Quantity' (5000000.0000), 'Start Price' (4.6667), and 'Physical Nature' (Goods). The 'Bid Parameters' section includes options for 'Bid Required', 'Reserve Price', 'Bid Quantity Rule' (Bid Up to Maximum Quantity), and 'Alternate UOM' (Not Allowed). The 'Item Specification' and 'Line Image' sections are collapsed. At the bottom, there is a '< Return to Event Lines Page' hyperlink and a 'Refresh' button.

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**.

Modify an Event

Line Items

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

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From Filtered View

Line Items 1-3 of 3

Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints	
<input type="checkbox"/> 1	0051404000	ABRASIVES, PLASTONE ABRASIVES, PLASTONE	1	STATE		Details	Bid Factors	No	<input type="button" value="Line Comments"/> <input type="button" value="Attachments"/>

Sourcing Line Comments

Modify an Event

Line Comments and Attachments

Event ID 0000153663 Line Number 1

Enter Comments 1 of 1

Comments:

AWARD: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The VDOT may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous (Code of Virginia, § 2.2-4359D). Should the VDOT determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by

Send To Bidder Include On Award



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**.

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

Modify an Event
Invite Bidders

Business Unit 50100 Event ID 0000155590 Round 1 Version 1 Event Format Buy Event Type RFx

Public Event

Bidder Invitation List ? Personalize | Find | View All | [Print] | [Grid] First ◀ 1 of 1 ▶ Last

Select	Bidder ID	Bidder Type	Status	Location	Bidder Company	Category	Diversity	*Dispatch Method		
<input type="checkbox"/>	PUBLIC_AUC	Public		1	This is a Public Event			Email		

Search for Bidders Dispatch Lines Save Bidders as Group

Save Event Changes GoTo

< Return to Event Overview

Return to Search Refresh



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.

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

- * Event Settings and Options
- Event Comments and Attachments
- Event Header Bid Factors
- Payment Terms and Contact Info
- Event Constraints

Step 2: Configure Line Items
Create line listings for this event.

- * Line Items
- Item Line Defaults

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

- * Bidder Invitations

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

- Event Collaborators

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

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.

The screenshot shows the 'Event Collaboration Details' form. At the top, there is a 'Modify an Event' button and the title 'Event Collaboration Details'. Below this, there are fields for 'Collaboration Due Date' (04/07/2017), 'Time' (4:15PM), and 'Process Type' (Sequential). A 'Review By Notifications' section is also present. The 'Review Sections' section includes a 'Seq Nbr' field (1), a 'Section Name' field, and a 'Bid Factor Default Option' dropdown (None). Below this, there are fields for 'Process Type' (Sequential), 'Section Review By Date', and 'Time'. The 'Collaborators' section is a table with the following data:

Seq Nbr	Userid	Name	Review By Date	Time	Delegate User ID	Name
1	A.HETZER	Hetzer, Andy (VDOT)				
2	A.SCOTT	Scott, Andrew (VDOT)				

Below the table are buttons for 'Find Collaborators' and 'Save As Group'. At the bottom of the form, there are buttons for 'Add Section', 'OK', 'Cancel', and 'Refresh'.



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.

The screenshot displays the event creation process in three main steps:

- Step 1: Define Event Basics**
Enter basic information, general settings and optional rules for this event.
 - * Event Settings and Options
 - Event Comments and Attachments
 - Event Header Bid Factors
 - Payment Terms and Contact Info
 - Event Constraints
- Step 2: Configure Line Items**
Create line listings for this event.
 - * Line Items
 - Item Line Defaults
- Step 3: Select Bidders to Invite**
Send out targeted invitations to this event, designate it as a public event, or both.
 - * Bidder Invitations

At the bottom, three buttons are visible: **Save Event**, **Post**, and **Preview PDF**. Red arrows indicate that clicking **Post** leads to a 'Message' dialog box with the text: "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." and clicking **Preview PDF** leads to another 'Message' dialog box asking: "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."



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

Event Workbench

Search Criteria

Business Unit

Event ID

Created By

Event Format

Event Type

Event Status

Associated With Plan

From Start Date

To Start Date

From End Date

To End Date

Sort With

Sort Order

Category

Item ID

Description

Plan Name

Only show Events I created

Only show Active Events

Use my search defaults

[Default Search Preferences](#)

Legend

Search Results Find | View 100 First 1-25 of 1422 Last

Event ID	Name	Format	Type	Unit	Status				
▶ 0000155448	Testing 98765	Buy	RFx	50100	0hrs,4mins,10secs				
▶ 0000155444	STONE CLASS I	Buy	RFx	50100	Open				
▶ 0000155443	STONE CLASS I	Buy	RFx	50100	Open				



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.

Event Workbench

Search Criteria

Business Unit

Event ID From Start Date To Start Date Sort With

Created By From End Date To End Date Sort Order

Event Format Category Only show Events I created

Event Type Item ID Only show Active Events

Event Status Description Use my search defaults

Associated With Plan Name

[Default Search Preferences](#)

Legend

Search Results Find | View 100 | First 1-25 of 1422 Last

Event ID	Name	Format	Type	Unit	Status				
▶ 0000155395	TRAFFIC CONTROL SE...	Buy	RFx	50100	0hrs, 10mins, 19secs	<input type="button" value="x"/>	<input type="button" value="book"/>	<input type="button" value="file"/>	<input type="button" value="list"/>
▶ 0000155448	Testing 98765	Buy	RFx	50100	Event Completed	<input type="button" value="x"/>	<input type="button" value="book"/>	<input type="button" value="file"/>	<input type="button" value="list"/>
▶ 0000155444	STONE CLASS I	Buy	RFx	50100	Open	<input type="button" value="x"/>	<input type="button" value="book"/>		
▶ 0000155443	STONE CLASS I	Buy	RFx	50100	Open	<input type="button" value="x"/>	<input type="button" value="book"/>		
▶ 0000155442	Stone Class I	Buy	RFx	50100	Open	<input type="button" value="x"/>	<input type="button" value="book"/>		
▶ 0000155441	Copy from Req	Buy	RFx	50100	Open	<input type="button" value="x"/>	<input type="button" value="book"/>		
▶ 0000155438	Copy req lines	Buy	RFx	50100	Open	<input type="button" value="x"/>	<input type="button" value="book"/>		
▶ 0000155435	Event Sole Source	Buy	RFx	50100	Event Completed	<input type="button" value="x"/>	<input type="button" value="book"/>	<input type="button" value="file"/>	<input type="button" value="list"/>



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**.

Event Workbench

Search Criteria

Business Unit

Event ID

Created By

Event Format

Event Type

Event Status

Associated With

Plan

From Start Date

To Start Date

From End Date

To End Date

Sort With

Sort Order

Category

Item ID

Description

Plan Name

Only show Events I created

Only show Active Events

Use my search defaults

[Default Search Preferences](#)

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

Search Results Find | View 100 | First 1-25 of 1422 Last

Event ID	Name	Format	Type	Unit	Status					
▶ 0000155395	TRAFFIC CONTROL SE...	Buy	RFx	50100	0hrs,10mins,19secs					
▶ 0000155448	Testing 98765	Buy	RFx	50100	Event Completed					
▶ 0000155444	STONE CLASS I	Buy	RFx	50100	Open					
▶ 0000155443	STONE CLASS I	Buy	RFx	50100	Open					
▶ 0000155442	Stone Class I	Buy	RFx	50100	Open					
▶ 0000155441	Copy from Req	Buy	RFx	50100	Open					
▶ 0000155438	Copy req lines	Buy	RFx	50100	Open					
▶ 0000155435	Event Sole Source	Buy	RFx	50100	Event Completed					



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

	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.

Event Workbench

Search Criteria

Business Unit

Event ID

Created By

Event Format

Event Type

Event Status

Associated With Plan

From Start Date

From End Date

Category

Item ID

Description

Plan Name

Modify an Event

Event Summary

Legend

Search Results

Event ID	Name	Format	Type	Unit	Sta
0000153663	RFP Sample	Buy	RFx	50100	02/13

Line	Category	Item ID	Item Description
1	0051404	0051404000	ABRASIVES, PLASTONE ABRASIVES PLASTONE
2	0051404	0051404055	ABRASIVES, PLASTONE 1 IN. X 50 Y ROLL, 320 GRIT
3	0051404	0051404115	ABRASIVES, PLASTONE 1-1/2 IN. W. FT. ROLL, 120 GRIT

0000153662	IFB	Buy	RFx	50100	Open
------------	-----	-----	-----	-------	------

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

Event Type RFx

Event Status Posted

*Solicitation Type:

Event Name RFP Sample

Description

Time Zone EST

Preview Date 01/20/2017 Time 1:08PM

Start Date 02/03/2017 Time 1:08PM

End Date 02/13/2017 Time 1:08PM

Copy From

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

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

* Event Settings and Options Payment Terms and Contact Info
Event Comments and Attachments Event Constraints
Event Header Bid Factors

Step 2: Configure Line Items
Create line listings for this event.

* Line Items Item Line Defaults



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**.

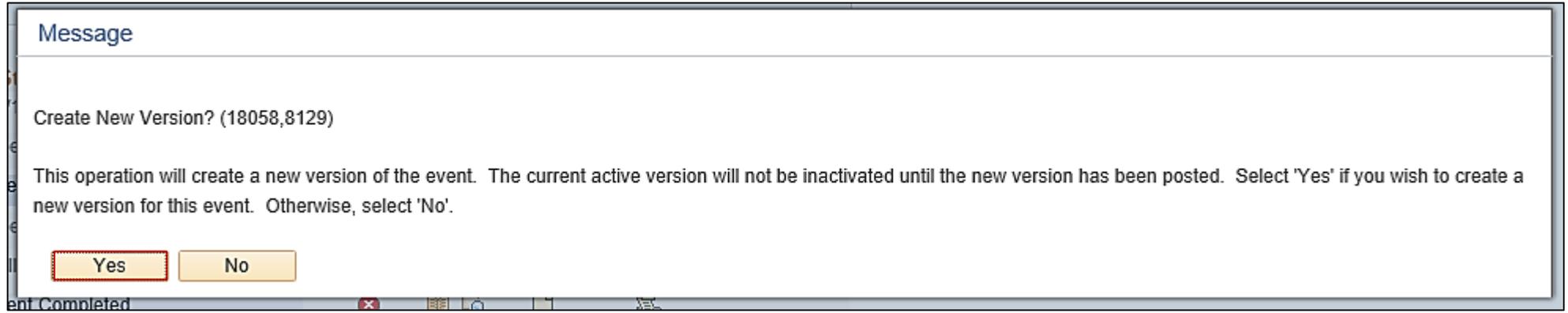
The screenshot shows the 'Event Workbench' interface. At the top, there is a navigation breadcrumb: 'Favorites > Main Menu > Sourcing > Maintain Events > Event Workbench'. Below this is the 'Event Workbench' title and a 'Search Criteria' section. The search criteria include: Business Unit (50100), Event ID, Created By, Event Format, Event Type, Event Status, Associated With Plan, From Start Date, To Start Date, From End Date, To End Date, Category, Item ID, Description, Plan Name, Sort With, and Sort Order. There are also checkboxes for 'Only show Events I created', 'Only show Active Events', and 'Use my search defaults', along with 'Search' and 'Reset' buttons. Below the search criteria is a 'Legend' section. The main part of the screenshot is a 'Search Results' table with columns: Event ID, Name, Format, Type, Unit, Status, and a set of action icons. The table contains five rows of data. The first row is highlighted, and a red box is drawn around the 'New Version' icon (a document with a plus sign) in the action icons column for the first row.

Event ID	Name	Format	Type	Unit	Status	Action Icons
0000150035	FOB Stone Bedford ...	Buy	RFx	50100	Pending Award	[New Version] [Print] [Details] [Refresh] [Close]
0000150009	delete - entered i...	Buy	Auction	50100	Open	[Print] [Details] [Refresh] [Close]
0000150006	Lighting Maintenan...	Buy	RFx	50100	Open	[Print] [Details] [Refresh] [Close]
0000150012	Replace Hydraulic ...	Buy	RFx	50100	Pending Award	[New Version] [Print] [Details] [Refresh] [Close]
0000150014	SET ASIDE FOR SMAL...	Buy	RFx	50100	Pending Award	[New Version] [Print] [Details] [Refresh] [Close]



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.

The screenshot shows a multi-step event creation process. The main interface is divided into five steps:

- 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
 - Post
 - Save As Template
 - Preview PDF

A pop-up message box is overlaid on the interface, titled "Message". It contains the following text: "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." The "OK" button in the message box is highlighted with a red border. A red arrow points from the "Post" button in Step 5 to the "OK" button in the message box.



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

The screenshot shows the 'Event Workbench' interface. At the top, there is a breadcrumb trail: 'Main Menu > Sourcing > Maintain Events > Event Workbench'. Below this, the 'Event Workbench' title is highlighted with a red box. The main area contains 'Search Criteria' with various input fields for Business Unit (50100), Event ID, Created By, Event Format, Event Type, Event Status, Associated With Plan, From Start Date, To Start Date, From End Date, To End Date, Category, Item ID, Description, and Plan Name. There are also checkboxes for 'Only show Events I created', 'Only show Active Events', and 'Use my search defaults', along with 'Search' and 'Reset' buttons. Below the search criteria is a 'Legend' section with various icons for actions like 'Pause', 'Resume', 'Cancel', 'Approval Status', 'Event History', 'Analyze Bids' (highlighted with a red box), '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', and 'View Award Details'. At the bottom, there is a 'Search Results' table with columns for Event ID, Name, Format, Type, Unit, and Status. The table shows five rows of data, with the 'Analyze Bids' icon highlighted in the third row.

Event ID	Name	Format	Type	Unit	Status			
0000150035	FOB Stone Bedford ...	Buy	RFx	50100	Open	✖	📖	📄
0000150009	delete - entered i...	Buy	Auction	50100	Open	✖	📖	
0000150006	Lighting Mainten...	Buy	RFx	50100	Open	✖	📖	
0000150012	Replace Hydraulic ...	Buy	RFx	50100	Pending Award	✖	📖	🔍
0000150014	SET ASIDE FOR SMAL...	Buy	RFx	50100	Pending Award	✖	📖	🔍



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.

The screenshot shows the 'Bid Analysis Export' page in a web application. The breadcrumb trail at the top reads: Favorites > Main Menu > Sourcing > Maintain Events > Event Workbench > Analyze Events.

Bid Analysis Export

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

Event Format: Buy Event Type: RFx Currency: USD Finish: 07/30/19 9:40AM EDT Status: Awarded

Analysis Export File Recipients Personalize | [?] First 1 of 1 Last

*Name	*Email Address	Notify	
1 Toya N. (VDOT) Peterson	xxtoya.peterson@vdot.virginia.gov	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Filter Bids

Select the bids you want to include in your Analysis Export file.

Award Counter Disallow Reject <No Action>

Display Disqualified Bids Display Withdrawn Bids

Filter Bid Responses

Display Delta Responses

 [Return to Analyze Event](#)

To create a bid analysis export:

1. Enter the email addresses of those you would like to receive the export.
2. Click on the Create Analysis Export button. At this point the Analyze Events pages will be saved, and a process will be kicked off to create the Bid Analysis Export file and email the recipients.



Analyze Bid/Proposal Responses (continued)

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

Bid Analysis Export

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

Event Format: Buy **Event Type:** RFx **Currency:** USD **Finish:** 07/30/19 9:40AM EDT **Status:** Awarded

Analysis Export File Recipients

Personalize | [?] First ◀ 1 of 1 ▶ Last [?]

	*Name	*Email Address	Notify	
1	Toya N. (VDOT) Peterson	xxxtoya.peterson@vdot.virginia.gov	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Filter Bids

Select the bids you want to include in your Analysis Export file.

Award Counter Disallow Reject <No Action>

Display Disqualified Bids Display Withdrawn Bids

Filter Bid Responses

Display Delta Responses

 [Return to Analyze Event](#)

To create a bid analysis export:

1. Enter the email addresses of those you would like to receive the export.
2. Click on the Create Analysis Export button. At this point the Analyze Events pages will be saved, and a process will be kicked off to create the Bid Analysis Export file and email the recipients.
3. Open the email received, open the Xlsx attachment in Microsoft Excel.



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**.

PeopleSoft Strategic Sourcing					Event Analysis																																	
Event ID	Format	Type	Round	Version	Report Date: 05/14/2020 11:58 AM EST																																	
50100-0000156030	Buy	RFx	1	4	Event Currency: US Dollar																																	
Event Name					Bids Allowed in Other Currency: No																																	
IFB# 156030 ROW MOWING & LITTER PICK UP SERVICES					Factor General Score into Line Score: No																																	
Start Time		Finish Time			Included Bids: All																																	
04/18/2020 09:00 AM EST		05/05/2020 04:05 PM EST			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																																						
					<table border="1"> <thead> <tr> <th>Bidder Name</th> <th>ican General Contractor</th> <th>Quick Cleaning System</th> <th>Meador Farms Inc</th> <th>BUSHWHACKERS INC</th> </tr> </thead> <tbody> <tr> <td>Event Version:</td> <td>4</td> <td>4</td> <td>4</td> <td>4</td> </tr> <tr> <td>Bid Number:</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> </tr> <tr> <td>Total Bid Amount:</td> <td>27644.7</td> <td>63279.34</td> <td>31461.255</td> <td>1240216.688</td> </tr> <tr> <td>Total Event Score:</td> <td>100.002</td> <td>78.0551</td> <td>41.1701</td> <td>0</td> </tr> <tr> <td>Award By Percent</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>				Bidder Name	ican 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				
Bidder Name	ican 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.

PeopleSoft Strategic Sourcing				Event Analysis				Report Date: 05/14/2020 11:58 AM EST				
Event ID	Format	Type	Round	Version	Event Currency: US Dollar				Bids Allowed in Other Currency: No			
50100-0000156030	Buy	RFx	1	4	Factor General Score into Line Score: No				Included Bids: All			
Event Name					Highlight Delta Response: No							
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									
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					Bidder Name							
Comments					African General Contractors				Quick Cleaning Systems			
- Non-Tractor Mow Interstate 195 in the City of Richmond					Meador Farms Inc				BUSHWHACKERS INC			
					Event Version: 4				4			
					Bid Number: 1				1			
					Line Bid Quantity: 10				10			
					Total Line Bid Amount: 4500				0			
					Total Line Score: 100				0			
					Unit Bid Price: 450				0			
					Score: 100				0			
					Minimum Quantity: 0				0			
					Bid Unit of Measure: ACR				ACR			
					Conversion Rate: N/A				N/A			
					Award By Percent							
					Award Quantity							
Price Details					Worst				Weighting			
What is your bid price?					300				100.00%			
Quantity Details					Requested							
Minimum Quantity:					0							
Unit of Measure:					ACR							



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**

The screenshot displays a software interface with a 'Main Menu' dropdown. The menu items are as follows:

- myCardinal Financials
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
- Customers
- Customer Contracts
- Items
- Suppliers
- Procurement Contracts
- Purchasing
- eProcurement
- Services Procurement
- Sourcing** (highlighted with a red box)
 - Create Events
 - Event Responses
 - Maintain Events
 - Reports** (highlighted with a red box)
 - Event Bid Tab** (highlighted with a red box)
 - SWAM Report
 - Cycle Time Analysis
 - Auction Summary
 - Supplier Solicitation Analysis
- Project Costing
- Travel and Expenses
- Billing
- Accounts Receivable
- Accounts Payable
- Banking
- Commitment Control
- Contract Ledger

On the right side of the interface, there are sections for 'myCardinal Financials' and 'myCardinal Messages'. The 'myCardinal Financials' section includes a 'Financials Report Execution' folder with sub-items: AP Reports, AR Reports, GL Reports, PA Reports, PR Reports, and Financials Query-based Reports. The 'myCardinal Messages' section includes a 'Begin Date' field.



Analyze Bid/Proposal Responses (continued)



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: RONIQUÉ.DAY

Closing Date: 01/04/2012
Closing Time: 3:45:00 PM

Page 1 of 7

<u>Supplier ID</u>	<u>Supplier</u>	<u>SWAM Type</u>	<u>Group / Line# / Item</u>	<u>Item Description</u>	<u>Quantity</u>	<u>Unit Price</u>	<u>Extended Price</u>	<u>Awarded</u>
Line Type: L 0000012056	Blake Crosby							
			1- 9684431314	GRAFFITI REMOVAL SERVICES POWER WASHING OVER 100 SQ. FT.	4500.0 0	\$25.00	\$112,500.00	
			2- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.0 0	\$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.	4500.0 0	\$25.00	\$112,500.00	
			5- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.0 0	\$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.	4500.0 0	\$25.00	\$112,500.00	
			8- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.0 0	\$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.	4500.0 0	\$25.00	\$112,500.00	
			11- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.0 0	\$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.	4500.0 0	\$25.00	\$112,500.00	
			14- 9684431304	GRAFFITI REMOVAL SERVICES POWER BLASTING OVER 100 SQ. FT.	4500.0 0	\$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.

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit = 50100

Event ID begins with

Event Round =

Event Version

Event Format

Event Name

Event Status

DateTime Finished

Case Sensitive

Limit the number of results

Search

Analyze Total

Analyze Total	Analyze Line	Analyze Group		Event Name:	Status:
Business Unit: 50100	Event ID: 0000153663	Round: 1	Version: 6	RFP Sample	Pending Award
Event Format: Buy	Event Type: RFX	Currency: USD	End Date: 01/23/2017 1:08PM EST		
Bid Analysis and Display Options					
Analysis					
	Bidder Name	In & Out Total	Building Maintenance LL	Commercial & Construction A Services Gro	Cleaning Inc
Event Version Responded To	5	5	5	5	5
Bid Number	1	1	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		



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**.

The screenshot displays the 'Event Collaboration Details' page. At the top, the 'Event Collaboration Details' tab is highlighted. Below it, the 'Bid Analysis Review Sections' section contains several form fields: 'Collaboration Due Date' (01/31/2017), 'Time' (11:00PM), 'Process Type' (Sequential), and a 'Show Bidders Name' checkbox. Underneath is a 'Review By Notifications' section with radio buttons for 'Never', 'One day before', 'One week before', 'Weekly before deadline', and 'Daily starting one week before'. The 'Review Sections' section includes a table for adding sections, with 'Seq Nbr' (1) and 'Section Name' fields. Below this is another 'Collaborators' table with columns for 'Seq Nbr', 'JserId', 'Name', 'Review By Date', 'Time', 'Delegate User ID', 'Name', 'Override Main Collaborator', 'Reviewed', and 'Reviewed'. The table contains two rows: one for 'ADAM.DIXON' (Dixon, Adam (VDOT)) and one for 'A.HETZER' (Hetzer, Andy (VDOT)). The 'Collaborators' table has '+', '-' icons at the end of each row. At the bottom of the form are buttons for 'Add Section', 'Route To', 'OK', and 'Cancel'.

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.

Analyze Line

Analyze Total

Business Unit: 50100

Event Format: Buy

Analyze Line

Event ID: 0000153663

Event Type: RFx

Analyze Group

Round: 1

Currency: USD

Version: 6

End Date: 01/23/2017 1:08PM EST

Event Name: RFP Sample

Status: Pending Award

Go To:

Line Items Personalize | Find | View All | | First 1-3 of 3 Last

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	0051404000	ABRASIVES, PLASTONE ABRASIVES, PLASTONE	0051404	EA	169.00000	5.0000	0.0000	<input type="text" value="0.00000"/>	Open <input type="button" value="v"/>	Analyze
2	0051404055	ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT	0051404	RO	0.01000	1.0000	0.0000	<input type="text" value="0.00000"/>	Open <input type="button" value="v"/>	Analyze
3	0051404115	ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT	0051404	RO	0.01000	1.0000	0.0000	<input type="text" value="0.00000"/>	Open <input type="button" value="v"/>	Analyze

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



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**.

Analyze Line

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

Line 1 Requested Quantity 5.0000 UOM EA Start Price 169.00000
Item ID 0051404000 Item Description: ABRASIVES, PLASTONE ABRASIVES, PLASTONE Weighting

▶ Bid Analysis and Display Options

Analysis

	Bidder Name Commercial & Construction A Services Group LLC Cleaning Inc	In & Out Total Building Maintenance LL
Event Version	5	5
Bid Number	1	1
Bid Quantity	5.0000	5.0000
Minimum Bid Quantity	0.0000	0.0000
Total Bid Amount	500.0000	925.0000
Total Bid Cost	0.00	0.00
Total Line Score	100.0000	0.0000

Bid Action	<input type="text" value="Award"/>	<input type="text" value="NA"/>	<input type="text" value="NA"/>
Reject Reason Code	<input type="text"/>	<input type="text"/>	<input type="text"/>
Award by Percent	<input type="text"/>	<input type="text"/>	<input type="text"/>
Award Quantity	<input type="text" value="5.0000"/>	<input type="text"/>	<input type="text"/>
Hide Bid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

▼ Factors

Add/Edit Bid Factors

Weighting UOM Ideal

What is your bid price?

<input type="text" value="100.00000"/>	0	<input type="text" value="100.00"/>	<input type="text" value="100.00"/>	<input type="text" value="185.00"/>
--	---	-------------------------------------	-------------------------------------	-------------------------------------

 << < > >> Go To Line



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**.

Favorites ▾ Main Menu ▾ > Sourcing ▾ > Maintain Events ▾ > Analyze Events New Window

Analyze Line

Analyze Total Analyze Line

Business Unit: 50100 **Event ID:** 0000155594 **Round:** 1 **Version:** 3 **Event Name:** Asphalt-Williamsburg Residency-Lee Hall Plant

Event Format: Buy **Event Type:** RFx **Currency:** USD **End Date:** 08/07/2019 2:15PM EDT **Status:** Awarded **Go To:**

Award Events

...

...Analyze Export

~~Associate Planning Task~~

Award Events

Create New Round

Document Status Inquiry

Event Comments and Attachments

Invite Collaborators

Review Optimization

First ◀ 1-10 of 32 ▶ Last

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty				
1	7452123000	SM-9.5A (SURFACE MIXTURE) SM-9.5A (SURFACE MIXTURE)	 7452123	LTN	58.75000	300.0000				Analyze
2	7452123000	SM-9.5A (SURFACE MIXTURE) SM-9.5A (SURFACE MIXTURE)	 7452123	LTN	58.75000	300.0000	300.0000	0.00000	Closed ▾	Analyze



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**.

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

Award Details

Award Details **Award Summary** **Review Constraints**

Business Unit: 50100 **Event ID:** 0000153663 **Round:** 1 **Version:** 6 **Event Name:** RFP Sample

Event Format: Buy **Event Type:** RFX **Currency:** USD **End Date:** 01/23/2017 1:08PM EST **Status:** Pending Award **Go To:**

▼ **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 **Bidder Type:** Supplier **Buyer:** GEORGE.MASON 🔍

Award Type: Purchase Order ▾ **Award Currency:** Event ▾ USD **Terms:** 🔍

PO Business Unit: 50100 🔍

Award Number: 1 **Total Award:** 368.0000

Award Lines Personalize | Find | View All | 📄 | 📄 **First** ◀ 1 of 1 ▶ **Last**

Line	Item ID	SupplItem 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

Award Details | Award Summary | Review Constraints



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.

Analyze Group

Analyze Total	Analyze Line	Analyze Group			Event Name:
Business Unit:	Event ID:	Round:	Version:	AWARD BY GROUP (LOT)	
50100	0000153665	1	2		
Event Format:	Event Type:	Currency:	End Date:	Status:	Go To:
Buy	RFx	USD	02/02/2017 1:31PM EST	Pending Award	<input type="text" value="..."/>

Line Items									Personalize	Find	View All	First	1 of 1	Last
Line	Group ID	Description	Details	UOM	Start Price	Requested Qty	Qty Awarded	Line Status	Analyze					
4	LOT 1	Richmond District	Details	10	0.03000	1.0000	1.0000	Open	Analyze					

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



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.

Navigation: Favorites > Main Menu > Sourcing > Maintain Events > Event Workbench > Analyze Events

Analyze Total

Analyze Total | Analyze Line | Analyze Group

Business Unit: 50100 | **Event ID:** 0000153663 | **Round:** 1 | **Version:** 6 | **Event Name:** RFP Sample

Event Format: Buy | **Event Type:** RFX | **Currency:** USD | **End Date:** 01/23/2017 1:08PM EST | **Status:** Pending Award | **Go To:** [Dropdown]

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

Analysis

	Bidder Name	In & Out	Total Building Maintenance LL	Commercial & Construction Cleaning Inc	A Services Group LLC
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] [v] | [Award] [v] | [Award] [v]

Reject Reason: [Text] [Search] | [Text] [Search] | [Text] [Search]

Award by Percent: [Text] | [Text] | [Text]

Hide Bid: | |

Factors

[Recalculate](#) | [Add / Edit Factors](#) | [Unhide Bids](#) | << | < | > | >>

[Save](#) | [Return to Search](#)

Analyze Total | Analyze Line | Analyze Group



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

Navigation: Favorites > Main Menu > Sourcing > Maintain Events > Event Workbench > Analyze Events

Analyze Total

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

[Bid Analysis and Display Options](#) ?

Analysis

	Bidder Name	In & Out	Total Building	Commercial & Construction	A Services Gro
	Maintenance LL			Cleaning Inc	
Event Version Responded To	5			5	5
Bid Number	1			1	1
Total Bid Amount	1,583.00			1,285.00	1,200.00

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



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.

Award Details

Award Details Award Summary Review Constraints

Business Unit: 50100 Event ID: 0000153663 Round: 1 Version: 6 Event Name: RFP Sample

Event Format: Buy Event Type: RFx Currency: USD End Date: 01/23/2017 1:08PM EST Status: Pending Award Go To: [Dropdown]

▼ 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 Bidder Type: Supplier Supplier: [Search] Buyer: GEORGE.MASON [Search]

Award Type: Purchase Order [Dropdown] Award Currency: Event [Dropdown] USD Terms: [Search]

PO Business Unit: 50100 [Search]

Award Number: 1 Total Award: 368.0000

Award Lines

Personalize | Find | View All | [Grid] [Print] First 1 of 1 Last

Line	Item ID	Supp/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price	
3	0051404115	<input checked="" type="checkbox"/>	ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT		RO	1.0000	368.0000	368.0000	[Edit]

Post Award

Save Return to Search Notify

Award Details | Award Summary | Review Constraints



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**.

Award Details

[Award Details](#) | [Award Summary](#) | [Review Constraints](#)

Business Unit: 50100 | Event ID: 0000153663 | Round: 1 | Version: 6 | Event Name: RFP Sample

Event Format: Buy | Event Type: RFX | Currency: USD | End Date: 01/23/2017 1:08PM EST | Status: Pending Award | Go To: ...

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 | Bidder Type: Supplier | Buyer: GEORGE.MASON

Award Type: Purchase Order | Award Currency: Event | USD | Terms:

PO Business Unit 50100

Award Number: 1 | Total Award: 368.0000

Award Lines

Line	Item ID	Supp/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price		
	3 0051404115	<input checked="" type="checkbox"/>	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)

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	<input type="text" value="..."/>

▼ Show Award Details to Bidders

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

Award Details ?

Bidder Name [In & Out Total Building Maintenance LL](#)

Award Type

Bidder Type Supplier

Award Currency USD

PO Business Unit

Buyer

Terms

First 1 of 3 Last

Award Number 1

Total Award 368.0000

Award Lines Personalize Find View All <input type="text"/> <input type="text"/>									
Line	Item ID	Supp/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price	
	3 0051404115	<input checked="" type="checkbox"/>	ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT		RO	1.0000	368.0000	368.0000	<input type="text"/> <input type="text"/>

Post Award

[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.

The screenshot shows the 'Express Purchase Order' page. At the top, the breadcrumb navigation includes 'Express Purchase Order' and 'Purchase Order', both highlighted with red boxes. The 'PO Status' is 'Dispatched', also highlighted with a red box. A menu of actions is highlighted with a red box, including 'Header Details', 'PO Defaults', 'PO Activities', 'Requisitions', 'Actions', 'Activity Summary', 'Add Comments', 'Add ShipTo Comments', and 'Document Status'. The 'Amount Summary' section shows a total amount of 545.00 USD. The 'Lines' table has one line item with a play button highlighted by a red box.

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



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 ID 0000030959
*Buyer DIANE.POWERS
PO Reference Claypool Hill HQ/Pounding Mill
Web IMS?:

Backorder Status Not Backordered
Receipt Status Received
*Dispatch Method Print
eVA PO Type R01
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	<input type="button" value="Calculate"/>
Freight/Tax/Misc.	0.00	
Total Amount	545.00 USD	

Add Items From ?

Catalog Item Search
Purchasing Kit

Select Lines To Display ?

Search for Lines
Line To

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 **Learning**.

Award Details

Award Details	Award Summary	Review Constraints		
Business Unit: 50100	Event ID: 0000150757	Round: 1	Version: 2	Event Name: FOB Stone for Wise Residency
Event Format: Buy	Event Type: RFx	Currency: USD	End Date: 01/10/2013 2:40PM EST	Status: Awarded
				Go To: <input type="text" value="..."/>

▼ 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 000000000000000000041260		
Award Number 1	Total Award 253,970.0000	

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:
50100

Event Format:
Buy

Event ID:
0000150757

Event Type:
RFx

Round:
1

Currency:
USD

Version:
2

End Date:
01/10/2013 2:40PM EST

Event Name:
FOB Stone for Wise Residency

Status:
Awarded

Go To:
...

▼ 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 000000000000000000041260

Award Number 1
 Total Award 253,970.0000

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

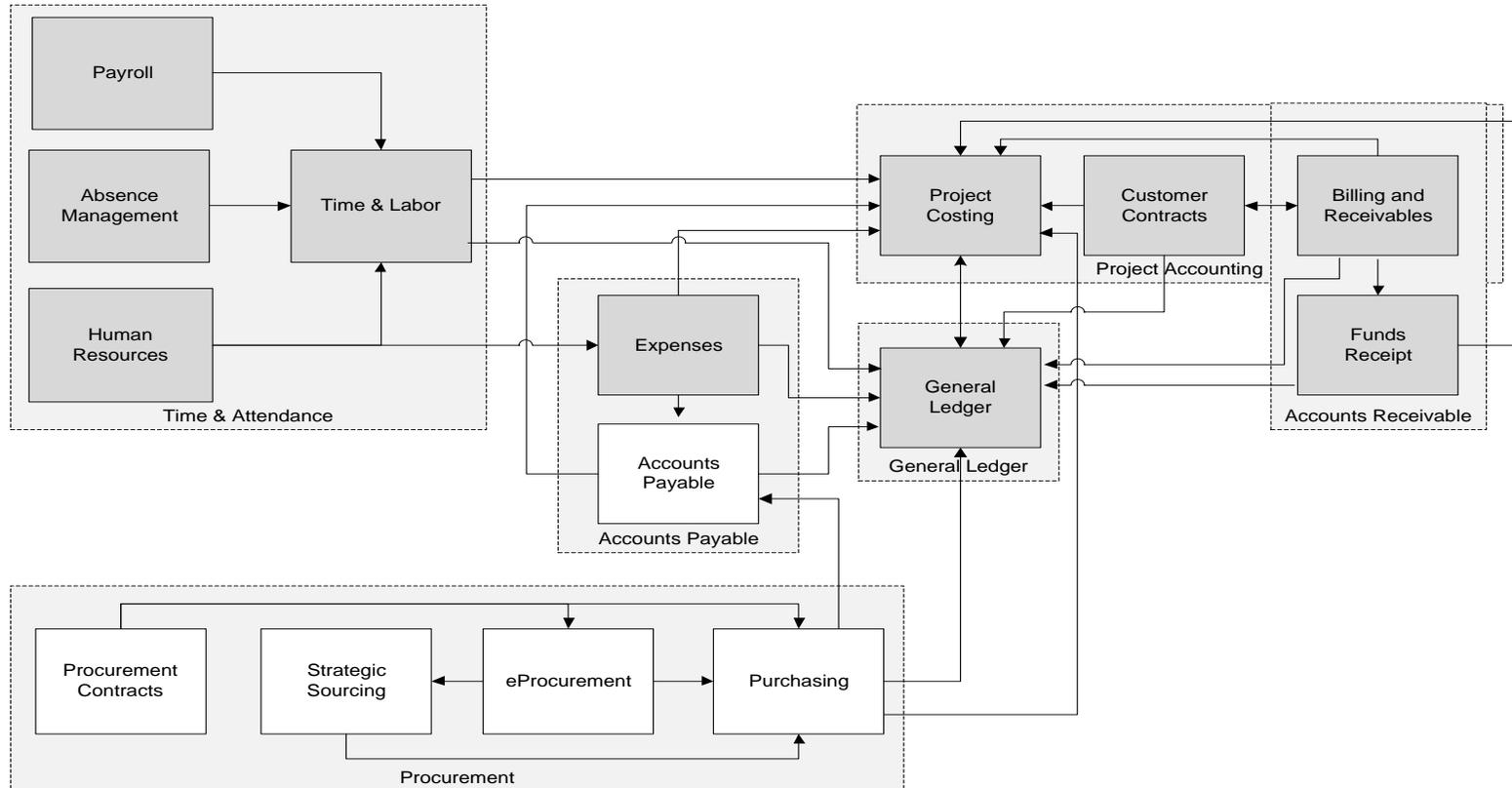
Status	Description	Bids Allowed
Open	Saved event, not posted, not routed for collaboration	No
Posted	Event is ready for bidding	Yes
Collaborating Event	Event routed for internal collaboration	No
Event Complete	Event ended but update event status process has not run	Yes
Pending Award	Event is complete, 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.

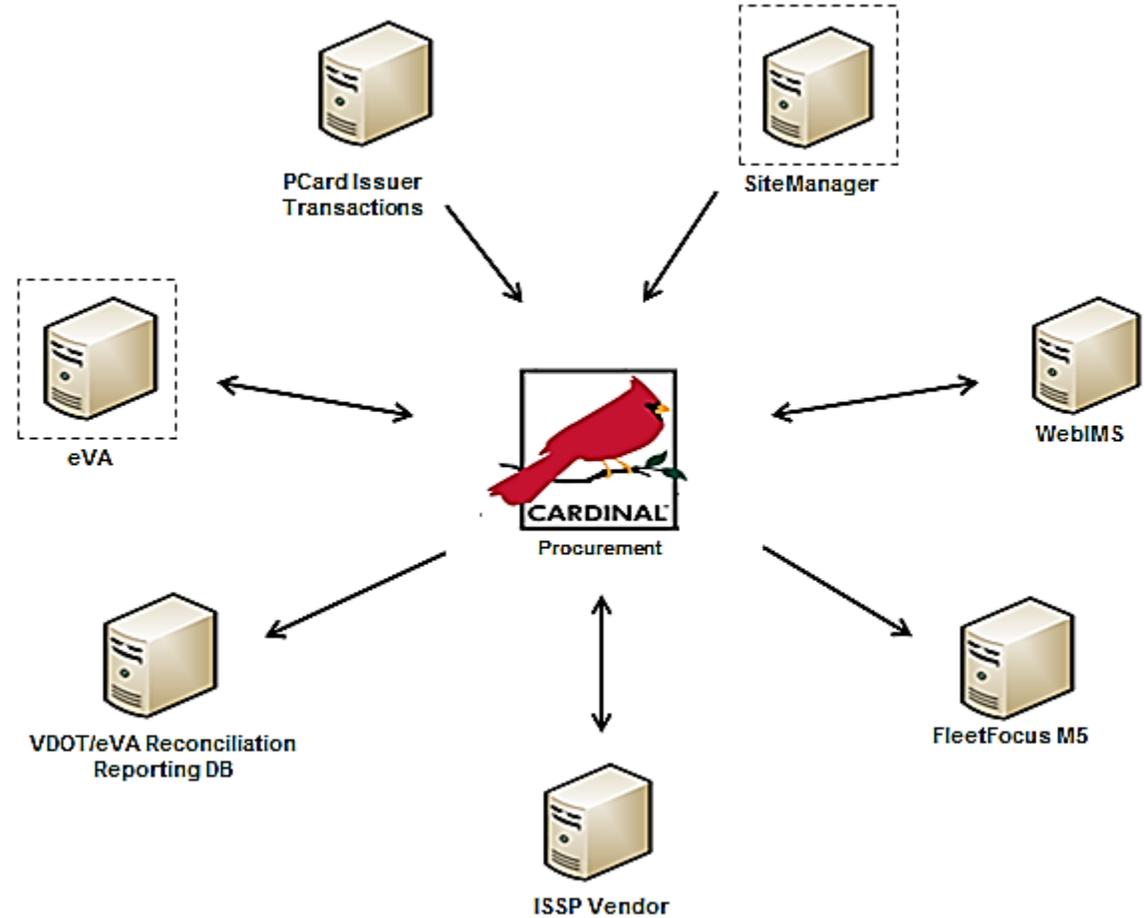




Interface with eVA

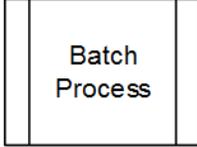
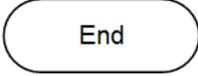
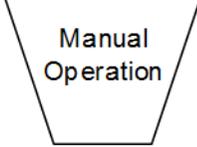
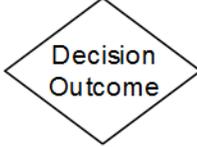
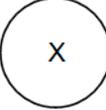
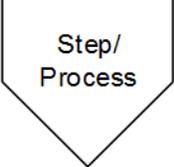
The Strategic Sourcing module also interfaces with an external system.

- Strategic Sourcing events are manually posted to
- All bidders must be registered in eVA.
- All eVA bidders (vendors) are interfaced into Card





Flowchart Key

	Depicts a process step or interface.		Indicates point at which the process begins. Does not represent any activity.
	Specifies a batch process.		Indicates point at which the process ends. Does not represent any activity.
	Depicts a process step that is preformed manually.		Depicts a document of any kind, either electronic or hard copy.
	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.		Indicates an on-page or intra process connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page.
	Represents an entity (person, organization, etc.).		Connects steps between business processes.