

Strategic Sourcing Event Set Up, Analyze and Award Overview

Cardinal allows the Strategic Sourcing (SS) Buyer to award bids by Total, Line(s), or Group (lot).

Generally not used or necessary, the Strategic Sourcing module also allows for Header and Bid Factors which provides the ability to evaluate events based on factors other than price. Factors include warranties offered, lead time, product quality and other items. Weights can be set for each bid factor, letting bidders know how much value is given to portion of bids. Price is, by default, the first bid factor of any event. The score depends on how close the answer to the bid factor comes to the ideal answer. **Note:** Bid Factors are not generally used.

For additional instructions on the SS process, refer to the course entitled **501 PR345: Strategic Sourcing** (located on the Cardinal website in **Course Materials** under Learning), job aids entitled **501 PR345: Strategic Sourcing Event Awards** and **501 PR345: Strategic Sourcing Collaboration** (located on the Cardinal website in **Job Aids** under Learning).

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Event Creation Basics

This job aid provides a simplified process to show how to set up, analyze and award sourcing events.

1. To create or update an event, access the **Create Event** page using the following path:

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

The **Create Events** page displays.

Favorites -	Main Menu 🗸	> Sourci	ng 🕶 >	Create Events -	>	Event Details
Create Even	ts					
Eind an Existi	ng Value Add a N	ew Value				
	Business Unit 50100 Event ID NEXT Event Round 1 Event Version 1	-				
	Event Version T Event Format Buy			~		
	Event Type RFx			~		
Proxy Bidding (Auctions Only) Disab	led		~		
Add						
Find an Existing	Value Add a New \	/alue				

- 2. Select the Add a New Value tab.
- 3. Confirm or update the **Event Type** to display **RFx**.

Note: If you have an existing event ID that needs updating, proceed to step 4.

4. Click **Add** to go to the **Event Summary** page to create the event. Proceed to step 5.



Favorites -	Main Menu 🗸	>	Sourcing -	>	Create Events -	>	Event Details	
Create Even Enter any inform	nation you have and c			field	Is blank for a list of	all v	alues.	
Search Cr								
- Jearch of	norra							
Business Unit Event ID Event Round Event Version Event Format	begins with =				~			
Event Type					~			
Event Name								
Event Status					~			
Case Sensitive Limit the number of results to (up to 300): 300 Search Clear Basic Search Save Search Criteria								
Find an Existing	Value ∣ Add a New V	alue	1					

5. To update an existing event, click the **Find an Existing Value** tab and enter the **Event ID** and click the **Search** button.

The **Event Summary** page displays and is updated with the values previously entered on the **Create Events** page.

Create an	n Event								
Event \$	Summary								
В	usiness Unit 50100	Event ID NEXT	Round 1		Version 1	Event Form	nat Buy		
	Event Type RFx	Chan	ge to Auction						?
	Solicitation Types	aled Contract	7	ſ	Time Zone E Preview Date 12		Time 1:00PM		
	Solicitation Type : IFB Se Event Name TEST				Start Date 01	1/06/2020	Time 1:00PM		
	Description TEST		PC	ા	End Date 01	/16/2020 讨	Time 1:00PM	0.	
					Copy From		~	Go	
					Preview By:	By Total	~		
Step 1	I fields reside on pages ma	sics		our	event until all req	uired fields are fil	led.		
Enter bas	sic information, general set	tings and optional rules for	this event.	~			m		





- 6. Confirm, update or enter the following fields on the Event Summary page:
 - a. Solicitation Type
 - b. Event Name
 - c. Description
 - d. Preview Date
 - e. Start Date
 - f. End Date
 - g. Preview By

The **Preveiw By** field allows you to select an award type by **Total**, **Line** or **Group/Lot**. This field defaults to **By Total** and may be changed, but not required.

Upon completion of the **Event Summary** set up, additional links and fields may be required or optional and will be covered in the following sections of this job aid.



Define Event Basics

There are five steps to **Create an Event**.

Step 1: Define Event Basics section is located on the Event Summary page.

Create an Event											
Event Summary											
Business Unit 50100	Event ID NEXT	Round 1	Version 1	Event For	mat Buy	?					
Event Type RFx	Char	ge to Auction				542					
Event Status Open			Time Zone ES	т							
*Solicitation Type :	IFB Sealed Contract	~	Preview Date 12/2	23/2019 🛐	Time 1:00PM						
*Event Name TEST			Start Date 01/0	06/2020	Time 1:00PM						
Description TEST		D.C.	End Date 01/1	16/2020 🛐	Time 1:00PM						
			Copy From		✓ Go						
			Preview By:	By Total							
Required fields reside on pa	ges marked with an asterisk (*)	you may not save yo	ur event until all requ	ired fields are fi	illed.						
	Step 1: Define Event Basics Enter basic information, general settings and optional rules for this event.										
Event C	Settings and Options comments and Attachments leader Bid Factors			nent Terms and (at Constraints	Contact Info						

The **Event Settings and Options** hyperlink is used to establish bid requirements, event scoring, as well as header and line factor weights, as applicable.

The **Event Comments and Attachments** hyperlink is used to insert Header type comments and attachments.

The **Event Header Bid Factors** hyperlink is used to select a bid factor from the look up listing provided. <u>This is necessary when the **Line Score** has been selected</u>. In this example, **By Total** has been selected.

The **Payment Terms and Contact Info** hyperlink is used to identify the Buyer contact information and Payment terms.

1. Click on the The **Event Settings and Options** hyperlink.



The **Event Settings and Options** page displays. The **Event Settings and Options** page is used to establish bid requirements, event scoring, as well as header and line factor weights, as applicable. How you set up the event defines how the award is made, by **Total**, **Line** or **Group/Lot**.

eate an Event					
vent Settings and Op	tions				
Business Unit 50100	Event ID NEXT Rour	nd 1 Version 1	Event Format Buy	Event Type RFx	
	Create PDF on Event Post Allow Bidder XML Download Bid Required On All Lines Multiple Bids Allowed	Round\Ve	rsion Display Display Round and Sealed Event		
	Allow Edit of Posted Bids Do Not Use Best Bids on Ne Display Bid Factor Ideal Valu		🗌 Display Bid Fa	ctor Best/Worst	
Factor Event Score In Header Weightir Line Factor Weightir	ng		Start Price Do Not Display	~	
			🗌 Bidders May C	reate Line Groups	
			Allow Price Bro	eaks with Groups	
Minimum Response and	Warning				
Minimum nun	ber of bid response	Numb	er of days warning prior]	
Associated Categories (2				
Save Event Changes			GoTo	~	Go
teturn to Event Overview					

- 2. Review the settings on this page:
 - a. Create PDF on Event Post: Checkbox defaults as checked. Do not change.
 - **b.** Bid Required On All Lines: Events may be set up to require a bid response on individual, or all lines. This should remain unchecked.
 - c. Mulitple Bids Allowed: Checkbox defaults as checked. Do not change.
 - d. Allow Edit of Posted Bids: Checkbox defaults as checked. Do not change.
 - e. **Factor Event Score Into:** Defaults to Total Score. Do not change.

When **Total Score** is selected, you do not need to enter a Header Weighting. Although, if desired, the header score is factored into the total score of the event, which is calculated by adding the weighted line scores plus the weighted header score. Select this option if you intend to award the entire event to one bidder.

- f. **Start Price:** Defaults to Do Not Display and typically this default setting is not changed, but you may.
- g. Header Weighting: Defaults to blank. Do not add a value.
- h. Line Factor Weighting: Defaults to blank.

If **Line Score** is selected, weights will automatically be assigned. In addition, a **Header Bid Factor** will be required. Header Bid factors are questions bidders must answer about their products,

Procurement Job Aid



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services, or company. The assigned weights will be automatically added to each line within an event. The line score will be calculated by adding the weighted scores of each line bid factor plus the weighted header score. Select this option if you intend to award different lines within the event to different bidders.

Note: The combined weightings assigned to the event line(s) and the event header must total 100%. If no header weight is used, line weights equal to 100% are automatically assigned upon save. If you attempt to Post the event, and the sum of the weightings applied to the event lines and event header do not equal 100%, an error message displays

If Total or Line Score: Do not Use.

- **Header Weighting**: The Header Weighting is not pre-populated You may enter a weight to determine how the system weighs the event header score in relation to the Total or Line Score. Weights applied at the header level apply to the overall event and to each line.
- **Line Factor Weighting**: Meaning how important that specific item or service is to the overall event.
- The **Event Header Bid Factors** hyperlink is used to select a bid factor from the look up listing provided. This is necessary when the **Line Score** has been selected.
- 3. Click the Return to **Event Overview** hyperlink.

NOTE: For additional instructions on creating and analyzing events, refer to the course entitled **501 PR345: Strategic Sourcing**, located on the Cardinal website in **Course Materials** under **Learning**.



Configure Line Items

Step 2: Configure Line Items section is located on the Event Summary page.

Create an Event						
Event Summary						
Business Unit 50100	Event ID NEXT	Round 1	Version 1	Event For	mat Buy	
						?
Event Type RFx	Chan	ge to Auction				
Event Status Open			Time Zone ES	Г		
*Solicitation Type : IFB S	ealed Contract	~	Preview Date 12/2	3/2019 🛐	Time 1:00PM	
*Event Name TEST			Start Date 01/0	6/2020 🛐	Time 1:00PM	
Description TEST			End Date 01/1	6/2020 🛐	Time 1:00PM	
beschpaon reor			Copy From		✓ Go	
			Preview By:	By Tota	l V	
Required fields reside on pages m	arked with an asterisk (*)	you may not save y	rour event until all requi	red fields are f	filled.	
			-			
Step 1: Define Event Ba						
Enter basic information, general s	ettings and optional rules fo	r this event.				
* Event Settin	gs and Options		Payn	nent Terms and	Contact Info	
Event Comme	ents and Attachments		Even	t Constraints		
Event Header	Bid Factors					
Step 2: Configure Line	tems					
Create line listings for this event.						
oroato nito notingo for tino event.						
* Line Items			Item	Line Defaults		

1. Click on the **Line Items** hyperlink.

The Line items page displays.

	Copy From	n	v 🗌	30				1	Filtered View All Lines and O	Broups 🗸
Line Item	And and a second se							Personalize	Find View All 🖓 🔜	First 🛞 1-4 of 4 🛞 Last
Basic Defi	nition Advanced Definition ID	ntion	Description		Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
01	7503518200	Q	STONE, RIP RAP CLASS 1	1	7503518	LTN	500.0000	37.5000	\$18,750.00	25.00000 + -
	7503518200	Q	STONE, RIP RAP CLASS 1	1	7503518	LTN	400.0000	37.5000	\$15,000.00	25.00000 🛨 🖃
2	1.4144444							Same State		
2	7503518200	Q	STONE, RIP RAP CLASS 1		7503518	LTN	200.0000	37.5000	\$7,500.00	25.00000 🛨 🖃



- 2. Enter the event lines on the **Basic Definition** tab for the following items, which will be totaled for the bid:
 - i. Item ID
 - j. Description
 - k. Category
 - I. Unit of Measure (UOM)
 - m. Quantity (Qty)
 - n. Start Price
 - o. Ext Amount
 - p. Weighting (not used)
- 3. Click on the **Advanced Definition** tab to further define lines.

Crea	ate an Eve	ent						$\overline{\langle}$
Lin	e Items							5
	Busines	s Unit 50100 Event ID N	EXT Round 1 Version 1	Eve	nt Format Bu	y E	event Type	RFx
Your	event may	consist of items from your item cal	alog and, optionally, ad-hoc items. You ca	in create the ev	ent lines manu	ally, or by copyin	g lines from	ane
		Copy From	Go	1				Ş
			•	J				
_	e Items							>
Da	Sig Delinibo	Auvanced Dennidon						1
	Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	}
_			ABRASIVES, PLASTONE ABRASIVES,					~
	1	0051404000 Q	PLASTONE	1	STATE		Details	3

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



The Line Details page displays.

Favorites - Main Menu - Sourcing - Create Events	 > Event Details 				
					Net
Create an Event					
Line Details					
GoTo Line 1 - 0051404000 ABRASIVES, PLASTONE A			Next	Previous	
Event ID NEXT	Req	uested Quantity	100.0000		
Line 1		Start Price	169.0000		
Item ID 0051404000 Description ABRASIVES, PLASTONE ABRASIVES, PL		Physical Nature	Goods	~	
Item Biddable Only if Grouped					
 Shipping Information (2) 		Find Vie	w All 🛛 First 🕚 1	l of 1 🛞 Last	1
Schedule 1				+ -	
Quantity 100.0000	Due Date 04/09/2022	Freight Terms	٩		
Ship Via Q	*Ship To	Ship From			J
▼ Bid Parameters ②					
Bid Required					
Reserve Price	Min Quantity 0.0000	Max Quantity	0.0000		
Bid Quantity Rule Bid Up to Maximum Quantity					
Alternate UOM Not Allowed	Bidder Defined Price Breaks				
	Li broder Denned Price Breaks				
Item Specification 2					
Line Image					
< Return to Event Lines Page			(D 1 1 1		_
2 Refresh			📑 Add	Update/Displ	ву

- 5. Enter **Shipping Information**, **Due Date** and **Ship To** location. The **Ship To** is a required field and the event cannot be saved without the **Ship To** field being completed.
- 6. Click the **Return to Event Lines Page** hyperlink to return to the **Line Items** page.

		Copy From		× (30					Filtered View All Lines and	Groups 🗸	1
Line Items	(2)								Personalize	Find View All 💷 🔜	First 🛞 1-4 of 4	E Last
Basic Defin	ition	Advanced Definition										
Line	Iter	m ID		Description		Category	*UOM	"QIY	Start Price	Ext. Amount	Weighting	
🗆 1	75	03518200	٩	STONE, RIP RAP CLASS 1	1	7503518	LTN	500.0000	37.5000	\$18,750.00	25.00000	
🗆 2	75	03518200	Q	STONE, RIP RAP CLASS 1	12	7503518	LTN	400.0000	37.5000	\$15,000.00	25.00000	
🗆 3	75	03518200	٩	STONE, RIP RAP CLASS 1	12	7503518	LTN	200.0000	37.5000	\$7,500.00	25.00000	Ð
4	75	03518200	Q	STONE, RIP RAP CLASS 1	12	7503518	LTN	100.0000	37.5000	\$3,750.00	25.00000	-
event Total: 4 < Return to E Save E	Gros	up Selected Lines		v) [Ж					Line Weighting Total	: 100 % Remaining W	Go

7. Click the **Return to Event Overview** link.



Select Bidders to Invite

Step 3: Select Bidders to Invite section is located on the **Event Summary** page. State procurement guidelines require all events be open to the public.

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	na it						

1. Click on the **Bidder Invitations** hyperlink.

The Invite Bidders page displays.

avorites 🗸	Main Menu 🗸	> Sourcing ->	Create Events ->	Event Details						
reate an Ev	vent									
nvite Bido	ders									
Busin	ess Unit 50100	Event ID NEXT	Round 1	Version 1	Event Format Buy	Event Type RFx				
	tation List 🕜					Person	alize Find View	All 🔄 🔜 🛛 First	🕢 1 of 1	🕑 Las
Select	Bidder ID	Bidder Type	Status	Location -	Bidder Company	Diversity	*Dispatch Method			
	PUBLIC_AUC	Public		1	This is a Public Event			Email		=
earch for Bid	ders	Dis	patch Lines		Save Bidders a	s Group				
	vent Changes]			GoTo		▼ Go			
Return to Ev	ent Overview									

- 2. Check the **Public Event** box.
- 3. Check the **Public_AUC** box.
- 4. Click on the **Save Event Changes.**

Click the Return to Event Overview hyperlink.





Invite Collaborators

For detailed information on **Step 4: Invite Collaborators**, refer to the job aid entitled **501 PR345: Strategic Sourcing Collaboration**, located on the Cardinal website in **Course Materials** under **Learning**.



Post Event

Once the event creation steps are complete, be sure to click **Save Event.** The next step is **Step 5: Post Event.**

Step 3: Select Bidders to Invite Send out targeted invitations to this event, designate it as a p	ublic event, or both.
* Bidder Invitations	
Step 4: Invite Collaborators Invite others to collaborate on this event. You may not post you	our event while collaborators are reviewing it.
Event Collaborators	
Step 5: Post Event When all event creation activities are complete, click Post Ev may have defined.	ent to release your event for scheduled external viewing and trigger any bidder invitations you
Save Event	Save As Template
Post	Preview PDF
Related Links:	

- 1. Click the **Preview PDF** button to send an e-mail to the Buyer with a detailed PDF event summary.
- 2. Click the **Post** button to post the event for bidding.

Cardinal sends the Sourcing Event information to eVA each day. The Strategic Sourcing Buyer is then required to update and re-post the event in eVA to allow any/all bidders on the web to respond.

eVA returns bidder information and bid responses back into Cardinal. Bids are then available to be analyzed in Cardinal. Once you have analyzed bids, Strategic Sourcing enables you to make awards per your determination.



Analyze Bids & Award Event – By Total

Once an event's **End Date** has passed and all the bids have been uploaded from eVA, using the **Event Workbench**, you can review the bids. Bids are considered and awarded based on the sum of all line items (by total).

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

Main Menu > Sourcing > Maintain Events > Event Workbench

Favorites - Main Menu - > S	ourcing 🔻 🚿	Maintain Events ->	Event Workbench		
Event Workbench					
 Search Criteria 					
Business Unit					
Event ID		From Start Date	Ħ	To Start Date 🛐 Sort With	~
Created By	Q	From End Date	Ħ	To End Date 3 Sort Order	~
Event Format 🗸 🗸		Category		Only show Events I c	reated
Event Type 🗸 🗸		Item ID		Only show Active Eve	
Event Status	~	Description		Use my search defaul	Reset
Associated With Q		Plan Name		Default Search Preferences	
Legend					
Search Results				Find View 100 First 🐠 1-2	5 of 1443 🕑 Last
Event ID Name	Format	Type Unit	Status		3 01 1443 🔍 Lasi
▶ 0000155606 TEST	Buy	RFx 50100	Open	S 🕸	
▶ 0000155605 Testing	Buy	RFx 50100	Open		
0000155604 IFB Sample	Buy	RFx 50100	Open		
▶ 0000155603 Test	Buy	RFx 50100	Open	Analyze Bids	
▶ 0000155602 TEST	Buy	RFx 50100	Event Completed	🛛 🖉 🗳 🔁 🔍	
0000155601 RFP Sample	Buy	RFx 50100	Open		
0000155600 RFP Samples	Buy	RFx 50100	Open	S 81	
> 0000155599 Statewide Advanced	Buy	RFx 50100	Event Completed	8 🕸 🖓 🗋 🖳	

2. Click the Analyze icon next to the event with bids you wish to review.



The Analyze Total page displays.

Analyze Total						
Analyze Total	Analyze Line					
Business Unit: 50100	Event ID: 0000150084	Round: 1	Version: 2	Event Name: FOB Stone - South Hill Resid	dency	
Event Format:	Event Type:	Currency:	End Date:	Status:	Go To:	
Buy Bid Analysis and	RFx Display Options	USD	01/31/2012 11:00AM EST	Pending Award		~
Analysis						
	Bid	der Name Luck \$	Stone Corp			
E	vent Version Resp	onded to 2				
	Bi	1 Number 1	P			
		I Amount 43,41	0.00			
		Bid Cost 0.00				
		ent Score 0.00				
		der Cost 0.00 ler Score 0.00				
	Total Head	ler score 0.00				
	F	id Action Awar	d 🗸			
		t Reason				
	Award b	y Percent				
		Hide Bid 🗌				
Recalculate	Add / Edit Fa	actors	Unhide Bids	<< <	>	>>
Return Analyze Total Analyze L						

- 3. The Total Bid Amount by Bidder displays.
- 4. In the column related to each winning Bidder, select the **Bid Action** of **Award**.
- 5. In the column related to each winning Bidder, set the **Award by Percent**. You could choose to allocate a portion of the event award to multiple bidders using the **Award by Percent** field.
- 6. Click the **Save** button.
- 7. From the Award Details page, you will make the award to the PO or contract. Navigate to the Award Details page using the following path:

Main Menu > Sourcing > Maintain Events > Award Events

You can also access this page from the **Analyze Total** page by clicking on the drop-down arrow in the **Go To** box and selecting **Award Events**.



The Award Details page displays.

Favorites	 Main Main Main Main Main Main Main 	Menu 🕶 🔿	Sourcing - > 1	Maintain Events 🔹 > 🛛 Awa	ard Events							
Awar	d Details											
Award D	etails	Award Summa	ry Review	v Constraints								
Busines	s Unit:	Event ID:	Round:	Version:	Event Name							
50100		0000157213	1	2	IFB 157213	B Facility Herbicio		n Services				
Event F	ormat:	Event Type:	Currency:	End Date:	Status:		Go To:			_		
Buy		RFx	USD	02/16/2022 4:06PM ES	T Pending Av	vard				~		
100		ails to Bidders										
Dis	olay bids	Dis	play all bids	Display bio	d scores	Disp	olay bid's tot	tal bid price	Dis	play fa	ctors	
Award [)etails 😨								First	<u>(</u>	1 of 1 🕑 i	Last
	Bidder Nam	e NaturChem In	D	Bid	Ider Type Supplie	r		Buyer PAME	ELA.TURNER	C	2	_
	Award Typ	e Procurement	Contract		Currency Event	Vusp		Terms 30	0			
		le Purchase Ord			-	10		121113	~			
	contract ory	re r aronase ore	<u> </u>	PO Busi	ness Unit 50100							
	Award Numbe	ar 1		Tot	tal Award	35,085.0000						
Award			~			Perso	nalize Find	View All	First	<u>۱</u>	of 1 🛞 Li	ast
Line	Item ID	Supp/Item Rel	Item Description		Group ID	UOM	Award Quantity	Awarded Price	Extended Price			
া	9888901003			TATION CONTROL WEED		EA	1.0000	35,085.0000	35,085.0000		dir.	
Save	Return t	o Search	Notify		T			P	ost Award			
Award Det	ails Award Sur	mmary Review	Constraints									

- 8. In the top right of the Award Details section, we see there is only one winning bidder (i.e., 1 of 1).
- 9. Enter the Award Type of either PO or Procurement Contract.
- 10. Confirm/update the PO Business Unit.
- **11.** Confirm/update the payment **Terms**.
- 12. Click the Post Award button.



The Contract Entry – Contract page displays.

Favorites - Main Menu -	> Sourcing - > Maintain Events - >	Awa	rd Events > Add	/Update Co	ntracts			
	· · · · · · · · · · · · · · · · · · ·							
Contract Entry								
Contract								
SatiD	QTATE		Contract Version					
Contract ID	000000000000000000045034		Vers	sion 1		Status Cu	urront	
*Status	Open 🗸		New Version		Ar	proval Due Date		21
	2010							
Administrator/Buyer	q							
▼ Header ?								
*Contract Style	Purchase Order	Q	Add Co	mments		Activity Log		
	Purchase Order			t Activities		Document Status		
	A SERVICES-001 Q Supplier Search		-	Contact Inf	0	Thresholds & Notifica Contract Reference	ations	
	0000004600 Q A Services Group	LLC	Conuac	t Releases		Contract Reference		
*Begin Date								
Expire Date			Amoun	t Summar	v (?)			
Renewal Date	5		Alloui			25	000.00	
Currency	USD Q CRRNT Q			Ma	ximum Amount	30,	000.00	USD
Primary Contact	Tommy Vickers		Li	ine Item Re	leased Amount		0.00	
Supplier Contract Ref		1	С	ategory Re	leased Amount		0.00	
	TEST RFx By Total	1	Ор	en Item Re	leased Amount		0.00	
		1		Total Re	leased Amount		0.00	
Master Contract ID		Q						
Tax Exempt ID					aining Amount		000.00	
	Tax Exempt			Ren	aining Percent		100.00	
Order Contract Options (2)	·							
Allow Multicurrency PO	Allow Open Item Referen	nce	🗆 Mus	st Use Con	ract Rate Date	Rate	e Date	01/31/2017
Corporate Contract	Adjust Supplier Pricing I	First	⊡ Aut	o Default				
Lock Chartfields	Price Can Be Changed o	n Ora	der *Dispato	ch Method	Print 🗸	Disp	atch	
PO Defaults	Add Open Item Price Adjustm	ents	Price Ad	djustment T	emplate			

13. The Purchase Order award displays. A **Contract ID** generates and displays.



Analyze Bids & Award Event – By Line

Once an event's **End Date** has passed and all the bids have been loaded from eVA, using the **Event Workbench** you can review the bids. Bids are considered and awarded based on the line items (by line).

1. Navigate to the **Event Workbench** page using the following path and follow normal procedures to analyze an event.

See the <u>Analyze Bids & Award Event – By Total</u> section of this job aid, steps 1-2:

Favorites -> Sourcing - > Maintain Events - > Event Workbench > Analyze Events Main Menu -Analyze Total Analyze Total Analyze Line Analyze Group Business Unit: Event ID: Round: Version: Event Name: 50100 RFP Sample 0000153663 6 1 Event Format: Event Type: Currency: End Date: Status: Buy RFx USD 01/23/2017 1:08PM EST Pending Award Analyze Export Bid Analysis and Display Options (?) Associate Planning Task Award Events Analysis Create New Round Document Status Inquiry Event Comments and Attachments Bidder Name In & Out Total Building Commercial & Construction A Services Gro Maintenance LL Cleaning Inc Invite Collaborators 5 Review Optimization Event Version Responded To 5 5 1 Bid Number 1 1 1,200.00 1,285.00 Total Bid Amount 1,583.00 0.00 Total Bid Cost 0.00 0.00 0.00 Total Event Score 0.00 0.00 Total Header Cost 0.00 0.00 0.00 Total Header Score 0.00 0.00 0.00 Bid Action NA ~ NA ~ NA ~ ÌQ, Reject Reason 2 Q Award by Percent Hide Bid

Main Menu > Sourcing > Maintain Events > Event Workbench

2. From the Analyze Total page, click the Analyze Line hyperlink.

The first Analyze Line page displays.

Ana	lyze Line											
Analyz	ze Total	Analyze Line	Analyze G	roup								
Busine	ess Unit:	Event ID:	Round:	Ve	ersion:		Event Name					
50100		0000153663	1	6			RFP Sample	9				
Event	Format:	Event Type:	Currency:	Er	nd Date:		Status:		Go To:			
Buy		RFx	USD	0	1/23/2017 1:0	8PM EST	Pending Aw	ard			~	
Line	Items 🕐								Pers	sonalize Find Vie	w Ali 🖓 🔜	First 🕚 1-3 of 3 🕑 Last
Line	Item ID	Description			Category	иом		Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
	1 0051404000	ABRASIVES, PLAS ABRASIVES, PLAS	STONE STONE	R	0051404	EA	169.00000	5.0000	0.0000	0.00000	Open 🗸	Analyze
	2 0051404055	ABRASIVES, PLAS YDS. ROLL, 320 G	STONE 1 IN. X 50 BRIT	ŀ	0051404	RO	0.01000	1.0000	0.0000	0.00000	Open 🗸	Analyze
	3 0051404115	ABRASIVES, PLAS W, 30 FT. ROLL, 1	stone 1-1/2 in. 20 grit	P	0051404	RO	0.01000	1.0000	0.0000	0.00000	Open 🗸	Analyze
R Sav		n to Search Line Analyze Grou	qu									,,



3. Click the **Analyze** hyperlink next to the **Line** you wish to award. The second **Analyze Line** page displays and details the extended bid response.

Favorites - Main M	Menu → Sou	urcing 🗸 🕥 Maintain	Events -> Event Work	bench > Analyze Eve	nts		
Apolyza Lino							
Analyze Line							
	Event ID: 0000153663	Round: Ver 1 7	sion:	Event Name: RFP Sample			
	Event Type: RFx		Date: 23/2017 1:08PM EST	Status: Pending Award			
Line 2		Requested	Quantity 1.0000	UOM RO	Start Price	0.01000	
Item ID 00514040 Bid Analysis and Dis		Item Description:	ABRASIVES, PLASTO	NE 1 IN. X 50 YDS. ROL	L, 320 GRIT Weight	ting P	Previous Line Next Line
Analysis							
	Bidder Nan	ne A Services Group I	LC Commercial & Co Cleaning Inc	Instruction In & Out Total	Building Maintenance LL		
	Event Versio		5	5			
	Bid Numb		1	1			
	Bid Quanti inimum Bid Quanti		1.0000	1.0000			
	Total Bid Amou		285.0000	290.0000			
	TOTAL BID CO		0.00	0.00			
	Total Line Sco	are 100.0000	5.5600	0.0000			
	Bid Actio	n Award 🗸	NA 🗸	NA V]		
R	leject Reason Cod	e Q		λ	[q		
	Award by Percen	nt					
	Award Quantit	y 1.0000					
	Hide Bi	id 🗆					
Factors							
Recalculate	Unhide Bids	1		<<	< >	>> Go To Li	ine 🗸
OK Cancel	Apply						

4. Click the arrow next to the **Factors** section to expand the section.



The Unit Price bid response displays in the Factors section.

Line 2 Item ID 0051404055 Item	Requested Quantity Description: ABRA		IOM RO N. X 50 YDS: ROLL, 320 GRIT	Start Price Weighting	0.01000	Previous Line	Next Line
 Bid Analysis and Display Options 	Description. ABRA	SIVES, FLASTONE TI	1. A 50 FDS. ROLL, 520 ORT			() (
Analysis							
Bidder Name A		Commercial & Construc Cleaning Inc	tion In & Out Total Building Maint	tenance LL			
Event Version 5		5	5				
Bid Number 1		1	1				
Bid Quantity 1		1.0000	1.0000				
Minimum Bid Quantity 0		0.0000	0.0000				
Total Bid Amount 2		285.0000	290.0000				
Total Bid Cost 0 Total Line Score 1		0.00	0.00				
Total Line Score	00.0000	5.5600	0.0000				
Bid Action Aw Reject Reason Code Award by Percent Award Quantity	vard V Q 100 1.0000	<u>NA</u> Q					
Hide Bid 🗆							
✓ Factors							
Add/Edit Bid Factors Weighting UOM Ideal							
What is your bid price? 100.00000 0	200.00	285.00	290.00				
Recalculate Unhide Bids			<< <	> >>	Go To Lin	ne	~
OK Cancel Apply							

- 5. In the column related to each winning Bidder, select the **Bid Action** of **Award**.
- 6. In the column related to each winning Bidder, set the **Award by Percent**. You could choose to allocate a portion of the event award to multiple bidders using the **Award by Percent** field.
- 7. Click the **OK** button.

The first Analyze Line page displays.

Favorite	ta ♥ Ma	in Menu → > 3	Sourcing 🕈 > N		n Events 🕶	> Event Wo	indendi 77	analyze Events				
Anal	yze Line											
Analyz	e Total	Analyze Line	Analyze	Group								
Busine	ss Unit:	Event ID:	Round:	Ve	rsion:		Event Name	:				
50100		0000153663	1	7			RFP Sample	e				
Event f	Format:	Event Type:	Currency:	En	d Date:		Status:		Go To:			
Buy		RFx	USD	0	1/23/2017 1	1:08PM EST	Pending Aw	ard			~	
Line I	tems 🕐								Pers	onalize Find Vie	w All 🖾 🔛	First ④ 1-3 of 3 ⑧ Las
Line	Item ID	Description			Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
	1 0051404000	ABRASIVES, PLAS		B	0051404	EA	169.00000	5.000	5.0000	0.00000	Open 🗸	Analyze

- 8. Line 1 now displays Qty Awarded.
- **9.** Repeat the bid entry process for all lines.



Analyz	e Total	Analyze Line	Analyze G	roup										
Busine	ss Unit:	Event ID:	Round:	Ve	rsion:		Event Name:							
50100		0000153663	1	6			RFP Sample	2						
Event	Format:	Event Type:	Currency:	En	d Date:		Status:						1	
Buy		RFx	USD	0	1/23/2017 1:0	8PM EST	Pending Aw	ard	Ana	ilyze Expo	rt		1	
									Asso	ciate Plann d Events	ning Task			
Line I	tems 🕐								The same	-		_	1	First 🕙 1-3 of 3 🕑 La
ine	Item ID	Description			Category	иом	Start Price	Requested Qty	Qty Even	ment Stat. Comment Collabora	ts and Attachm	ents		Analyze
	1 0051404000	ABRASIVES, PLAS ABRASIVES, PLAS		B	0051404	EA	169.00000	5.0000	Revie	w Optimiz		Open	Ļ	Analyze
	2 0051404055	ABRASIVES, PLAS YDS. ROLL, 320 G	STONE 1 IN. X 50 RIT	R	0051404	RO	0.01000	1.0000	1.0	0000	0.00000	Open	~	Analyze
	3 0051404115	ABRASIVES, PLAS W, 30 FT. ROLL, 12	TONE 1-1/2 IN. 20 GRIT	8	0051404	RO	0.01000	1.0000	1.0	0000	0.00000	Open	×	Analyze

10. From the **Analyze Line** page, navigate to the **Award Details** page where you will make the award to the PO or contract. Navigate to the **Award Details** page using the following path:

Main Menu > Sourcing > Maintain Events > Award Events

You can also access this page from the **Analyze Line** page by clicking on the drop-down arrow in the **Go To** box, and selecting **Award Events**.

The Award Details page displays.

Favorite	is ≠ Mair	Menu • →	Sourcing • > Ma	aintain Events 👻	 Event Wo 	iddench > A	nalyze Events	> Award	Events				
Awa	rd Details												
Award	Details	Award Summa	y Review	v Constraints									
Busine 50100	ess Unit:	Event ID: 0000153663	Round: 1	Version: 6		Event Name RFP Sample							
Event	Format:	Event Type:	Currency:	End Date:		Status:		Go To:					
Buy		RFx	USD	01/23/2017	1:08PM EST	Pending Av	vard				~		
▼ Sh	ow Award De	tails to Bidders											
DDi	splay bids	Dis	play all bids		Display bid s	cores	Dis	play bid's to	tal bid price	Dis	play (factors	
Award	Details (?)									Firs	t 🛈	1 of 3	E Last
	-	ne in & Out Total	Building Maintenan	ce LL		r Type Supplier	r Viuso	. 11	Buyer GEO	RGE.MASON		۹	
					-	ss Unit 50100			renns	_~			
	Award Numb	ver 1			Total	Award	368.0000			024-se		_	
Aware	d Lines						Pers	onalize Fin	d View All 🖓	I 💀 First	۲	1 of 1 @	Last
Line	ttem ID	Supp/Item Rel	Nem Description			Group ID	UOM	Award Quantity	Awarded Price	Extended Price			
	3 0051404115	82	ABRASIVES, PLA ROLL, 120 GRIT	STONE 1-1/2 IN.	W, 30 FT.		RO	1.0000	368.0000	368.0000		6	ţ.
									P	Post Award			

- 11. In the example above, two Bidders received an award. The first Bidder displays and has received an award for two lines, part of Line 1 and all of Line 2.
- 12. Enter the Award Type of either PO or Procurement Contract.





- 13. Confirm/update the PO Business Unit.
- **14.** Confirm/update the payment **Terms**
- **15.** To enter their **Award Details** for the second Bidder, from the **Award Lines** section blue header bar, click the arrow icon.

Favorite	s 🗸 Main I	Menu 🗸 🔿	Sourcing 🗸 🕥 Maii	ntain Events 👻 > Event Wo	kbench > Awa	d Events				
Awa	rd Details									
Award		Award Summar		Constraints						
	ss Unit:	Event ID:	Round:	Version:	Event Name:					
50100	Format:	0000153663	1	7	RFP Sample		Go To:			
	Format:	Event Type: RFx	Currency: USD	End Date: 01/23/2017 1:08PM EST	Status:		GO TO:		~	
Buy	ow Award Deta			01/23/2017 1:06PM EST	Pending Awar					
Dis	splay bids	Dis	play all bids	Display bid s	cores	Displa	y bid's tot	al bid price	🗆 Display	factors
Award	Details 🕐								First	9 2 of 3 🕑 Last
	Bidder Nam	e A Services Gro	oup LLC	Bidde	rType Supplier			Buyer GEO	RGE.MASON]Q
	Award Typ	e Procurement	Contract	V Award Cu	irrency Event	VUSD		Terms 30	Q	
	*Contract Styl	le Purchase Ord	er Q	PO Busine	ss Unit 50100 Q					
	Award Numbe	er 1		Total	Award	200.0000				
Aware	l Lines					Person	alize Find	i View All 🗗	🔣 🛛 First 🕚	1 of 1 🕑 Last
Line	Item ID	Supp/Item Rel	Item Description		Group ID	UOM	Award Quantity	Awarded Price	Extended Price	
	2 0051404055		ABRASIVES, PLAS 320 GRIT	TONE 1 IN. X 50 YDS. ROLL	•	RO	1.0000	200.0000	200.0000 🗒	8
								P	ost Award	
ITTI Occur	Th Dataset	Deput	Made					1		
📆 Save			Notify							
Award De	tails Award Sun	nmary Review (Constraints							

- 16. The second awarded Bidder displays. In this example, the second Bidder has been awarded all of Line 2.
- 17. Enter the Award Type of either PO or Procurement Contract.
- 18. Confirm/update the PO Business Unit.
- **19.** Confirm/update the payment **Terms**.
- 20. Click the Post Award button. The Contract Entry Contract page displays.
- 21. The contract award displays. A Contract ID generates and displays.





Analyze Bids & Award Event – By Group (Lot)

Once an event's **End Date** has passed and all the bids have been uploaded from eVA, using the **Event Workbench**, navigate to the **Analyze Total** page where you can review the bids. Bids are considered and awarded based on the line items within the **Group**.

1. Navigate to the **Event Workbench** page using the following path and follow normal procedures to analyze an event.

See the Analyze Bids & Award Event - By Total section of this job aid, steps 1-2:

Analuza Tat	al						
Analyze Tota	0.0000000000000000000000000000000000000						
Analyze Total	Analyze Line	Analyze G	roup				
Business Unit: 50100	Event ID: 0000153665	Round: 1	Version: 2		Event Name: AWARD BY GROUP (LOT)		
Event Format:	Event Type:	Currency:	End Date:		Status:	Go To:	
Buy Bid Analysis ar	RFx nd Display Options (USD ?	02/02/2017 1:31	1PM EST	Pending Award		*
Analysis							
	Bi	idder Name ENVI INC	ROBATE GLOBAL,	Ken Const	truction Co Inc		
	Event Version Res	ponded To 2		2			
	E	Bid Number 1		1			
		Bid Amount 42,50		30,000.00	0		
		al Bid Cost 0.00		0.00			
	23/20/20/20	vent Score 100.0	No. Contraction of the second se	100.00 0.00			
		ader Score 100.0		100.00			
	Reje	Bid Action NA ect Reason by Percent Hide Bid	 α		> מ □		
Factors							
Recalculate	Add / Edit F	Factors	Unhide Bids	j.	<< <	>	>>
	turn to Search	ID					

Main Menu > Sourcing > Maintain Events > Event Workbench

2. From the Analyze Total page, click the Analyze Group hyperlink.



The Analyze Group page displays.

	lyze Gro	•		_								
-	ze Total	Analyze Line	Analyze	-								
Busin	ess Unit:	Event ID:	Round:	Ve	ersion:		Event Nam	ne:				
50100 0000153665		1	2		AWARD BY GROUP (LOT)							
Event	Format:	Event Type:	Currency:	Er	nd Date:		Status:		Go To:			
Buy		RFx	USD	02/02/2017 1:31PM E			Pending A		···· V			
Line	Items							Persona	alize Find \	/iew All 🗇		First 🛈 1 of 1 🕑 L
Line .ine	ltems Group ID	Description			Details	UOM		Requested	alize Find \ Qty Awarded			First ④ 1 of 1 ④ L Analyze

3. Click the Analyze hyperlink next to each Group ID (e.g., Group ID equals Lot 1) you wish to award. Another Analyze Group page displays and details the extended bid response.

The Analyze Group page shows the Group/Lot total per bidder.

Analyze Gr	oup								
Business Unit: 50100 Event Format: Buy	Event ID: 0000153665 Event Type: RFx	1	Version: 2 End Date: 02/02/2017 1:31PM EST	Event Name: AWARD BY GROL Status: Pending Award	JP (LOT)				
Line	4	Request	ted Quantity 1.0000	UOM 10		Start Price	0.03000		
Group ID LC	OT 1 and Display Options	Item Description	: Richmond District		Details	Weighting	ρ	Previous Group Next Group	
Analysis	1.7.1								
	Event Vers Bid Nun Bid Quar Minimum Bid Quar Total Bid Amo Total Bid Amo	nber 1 ntity 1.0000	on Co Inc ENVIROBATE 0 2 1 1.0000 0.0000 0.000 0.000 0.000 0.0000	Global, Inc					
	Bid Acti Reject Reason Co Award by Perco Award Quant	ode	Q	۵ ۵					
	Hide	Bid 🗆							
Factors Recalculate OK OK C	Unhide Bids			<<	<	> >>	Go To L	ine	V

4. Click the arrow next to the **Factors** section to review the bid factors.



▼ Factors	
Weighting UOM Ideal	
SWAM Business Classification Are you a Virginia "certified" Small business? 100.00000 Y Y Y Recalculate Add / Edit Factors Unhide Bids <<	
Ralyze Total Analyze Group	

Scroll back up to the Analysis section to make the award for this Group. 5.

Favorites - N	ain Menu → So	ourcing 🗢 🔸 Mainta	in Events + > Event Work	bench > Analyze Events			
Analyze Grou	ip						
Business Unit: 50100	Event ID: 0000153665		fersion: 2	Event Name: AWARD BY GROUP (LOT)			
Event Format: Buy	Event Type: RFx		ind Date: 02/02/2017 1:31PM EST	Status: Pending Award			
Line 4 Group ID LOT I Bid Analysis an	1	Requeste Item Description:	d Quantity 1.0000 Richmond District	UOM 10 Details	Start Price Weighting	0.03000 Previous Group	Next Group
Analysis	Event Vers Bid Num	ber 1 tity 1.0000 tity 0.0000 unt 240.0000 oost 240.00 oon Award V de C ty	2 1 1.0000 0.0000 0.000 0.000 0.0000 NA	LOBAL, INC			
Factors Recalculate	Unhide Bids]		٠	> >>	Go To Line	>
OK Car	Apply						

When complete, click the **OK** button. 6.



The Analyze Group page displays.

Analy	alyze Gro ze Total	Analyze Line	Analyze	Group)						
-	ness Unit:	Event ID:	Round:	Version: Event Name:							
50100 0000153665			1	2	2	AWARD BY GROUP (LOT)					
Event Format: Event Type:		Event Type:	Currency:	E	nd Date:	Status: Go To:					
Buy		RFx	USD	0	2/02/2017 1:	31PM EST	Pending A	ward			~
Line	Items							Person	alize Find V	fiew All 💷 层	First ③ 1 of 1 ④ Las
Line	Group ID	Description			Details	UOM	Start Price	Requested Qty	Qty Awarded	Line Status	Analyze
		Richmond District		E	Details	10	0.03000	1.0000	1.0000	0000	Analyze

- 7. The Qty Awarded on the Group ID of Lot 1 is populated.
- 8. Repeat the process to award all remaining Groups/Lots.
- 9. When all Lots have been awarded, click the **Save** button.
- **10.** From the **Award Details** page, you will make the award to the PO or contract. Navigate to the **Award Details** page using the following path:

Main Menu > Sourcing > Maintain Events > Award Events

You can also access this page from the **Analyze Group** page by clicking on the drop-down arrow in the **Go To** box, and selecting **Award Events**. The **Award Details** page displays. Follow procedures to make the award to the PO or contract using the **Analyze Bids & Award Event – By Total** section of this job aid, <u>steps 7-13.</u>