

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**).

Table of Contents

| | |
|--|----|
| Event Creation Basics..... | 2 |
| Define Event Basics..... | 5 |
| Configure Line Items..... | 8 |
| Select Bidders to Invite | 11 |
| Invite Collaborators..... | 12 |
| Post Event | 13 |
| Analyze Bids & Award Event – By Total..... | 14 |
| Analyze Bids & Award Event – By Line..... | 18 |
| Analyze Bids & Award Event – By Group (Lot)..... | 23 |

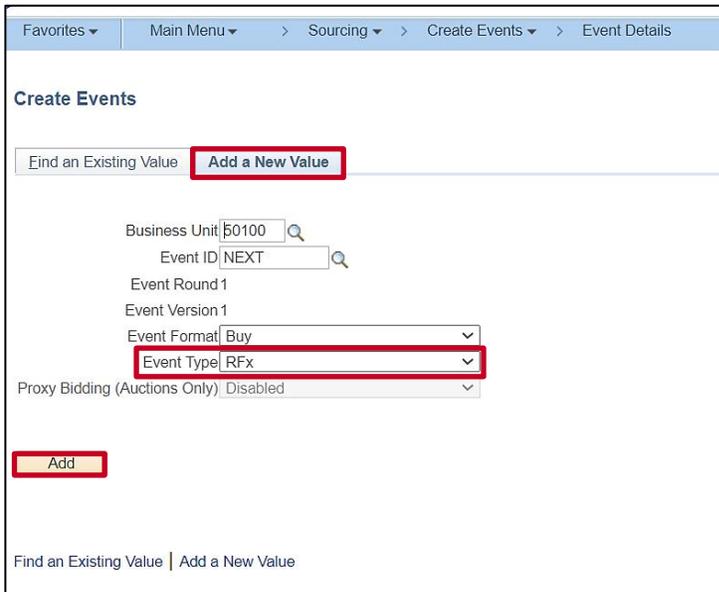
Event Creation Basics

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

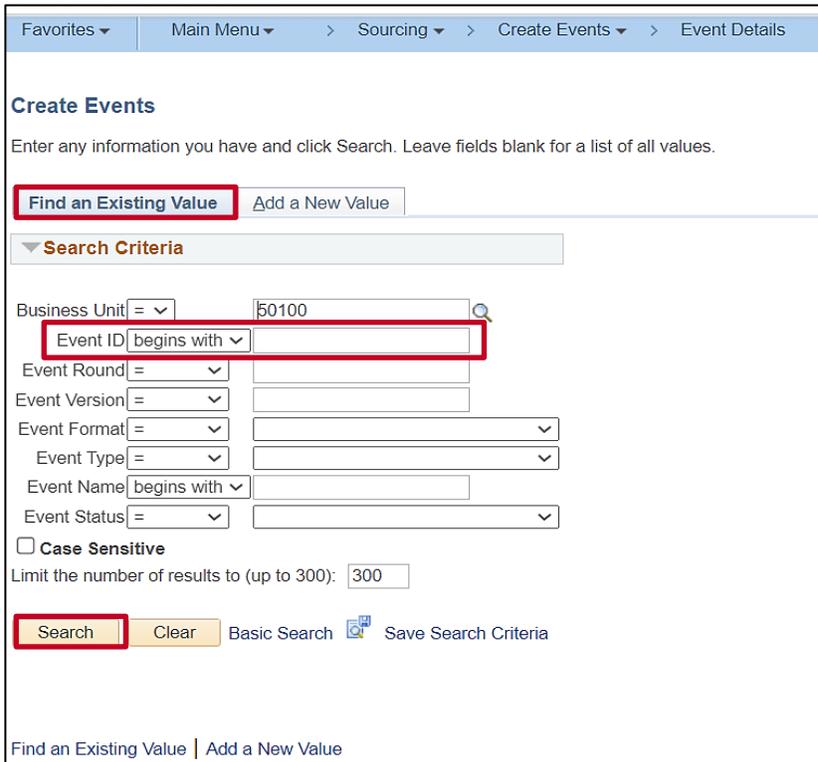
The **Create Events** page displays.



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.

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award


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

Create Events

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

- 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 Event
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: IFB Sealed Contract

*Event Name TEST

Description TEST

Time Zone EST

Preview Date 12/23/2019 Time 1:00PM

Start Date 01/06/2020 Time 1:00PM

End Date 01/16/2020 Time 1:00PM

Copy From Go

Preview By: By Total

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

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

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award

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**

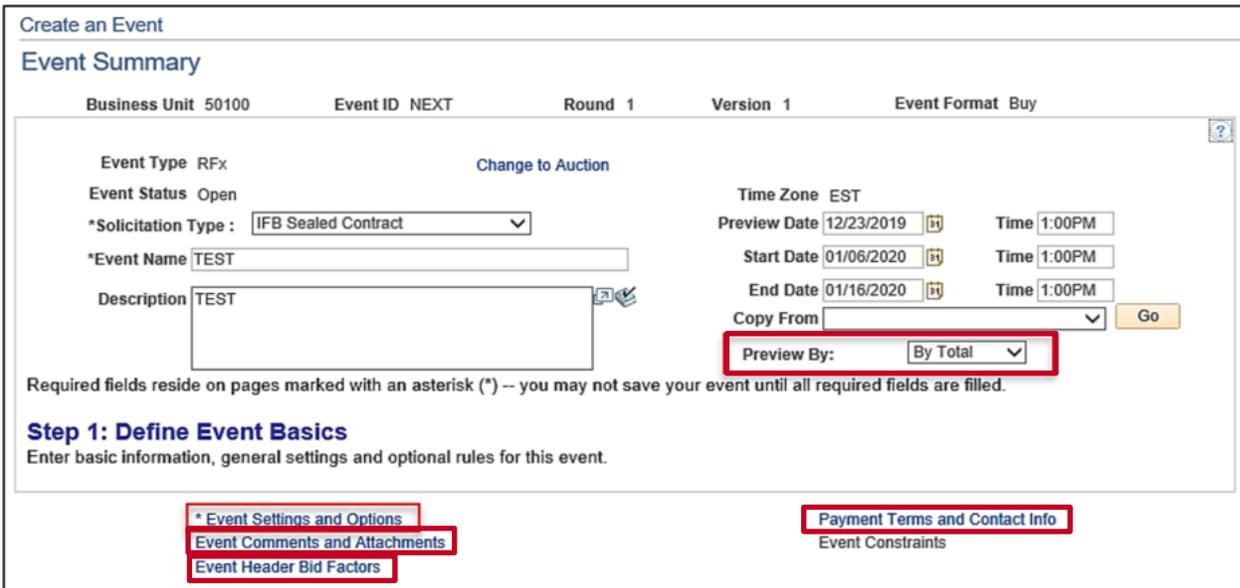
The **Preveiw By** field allows you to select an award type by **Total**, **Line** or **Group/Lot**. This field defaults to **By Total** and may be changed, but not required.

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 Format Buy

Event Type RFx [Change to Auction](#)

Event Status Open

*Solicitation Type : IFB Sealed Contract

*Event Name TEST

Description TEST

Time Zone EST

Preview Date 12/23/2019 Time 1:00PM

Start Date 01/06/2020 Time 1:00PM

End Date 01/16/2020 Time 1:00PM

Copy From Go

Preview By: By Total

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

Step 1: Define Event Basics

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

[* Event Settings and Options](#)

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)

Event Constraints

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.

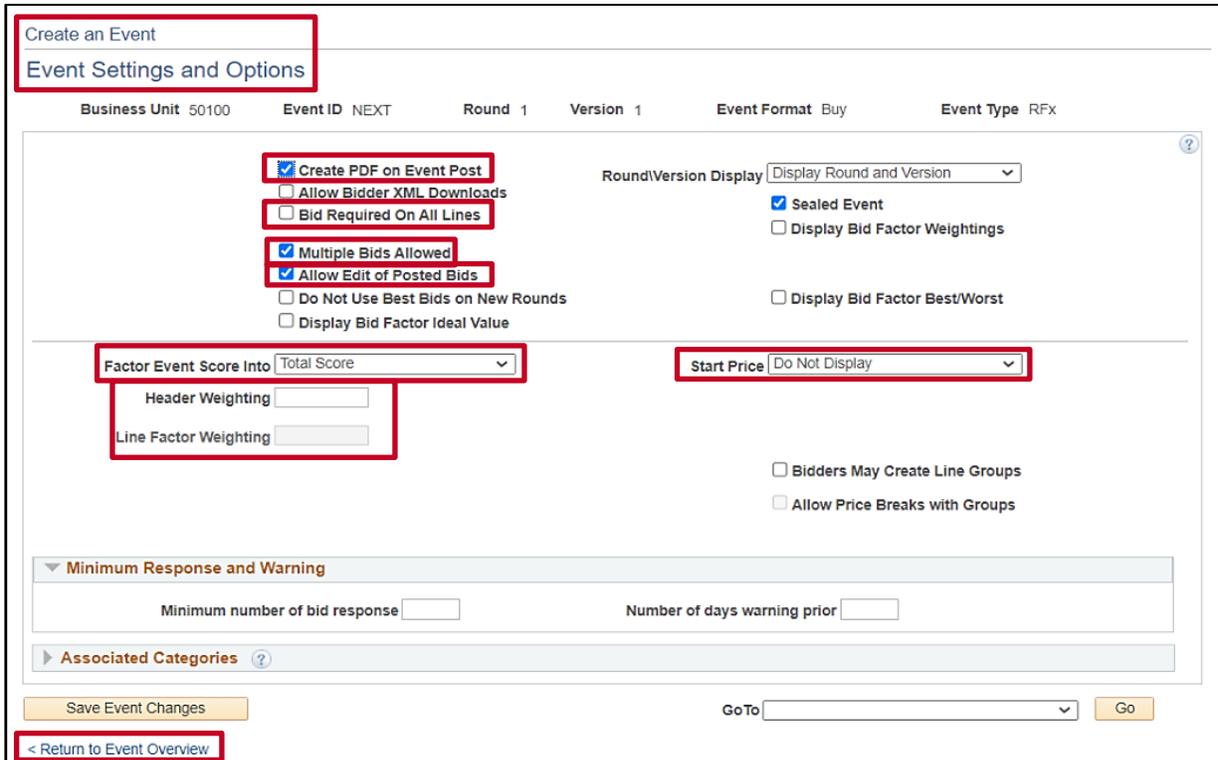
The **Event Header Bid Factors** hyperlink is used to select a bid factor from the look up listing provided. This is necessary when the **Line Score** has been selected. In this example, **By Total** has been selected.

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.

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award

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**.



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. **Multiple 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,

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award

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.

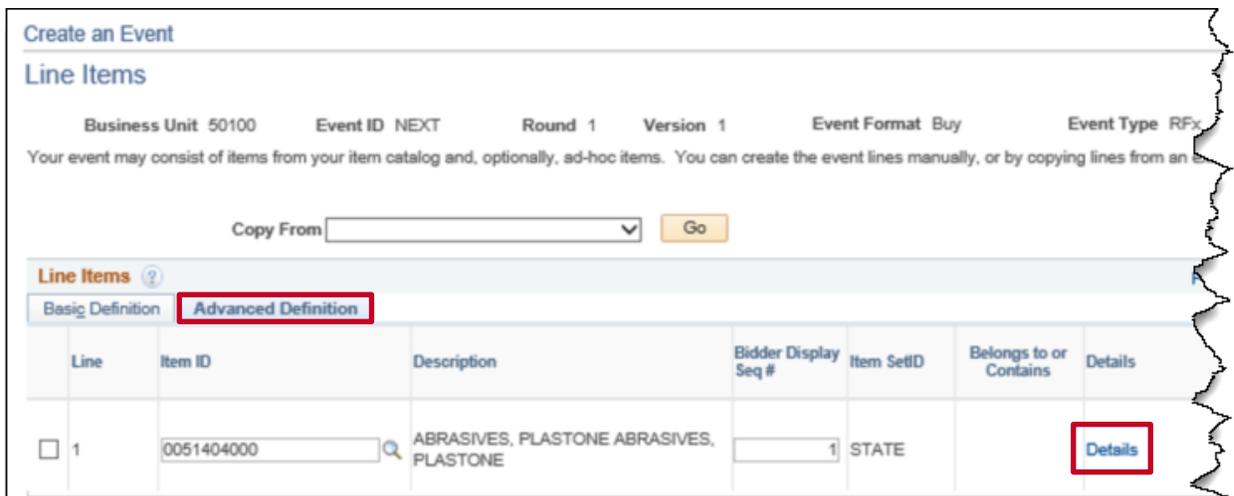
- **Header Weighting:** The Header Weighting is not pre-populated You may enter a weight to determine how the system weighs the event header score in relation to the Total or Line Score. Weights applied at the header level apply to the overall event and to each line.
- **Line Factor Weighting:** Meaning 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**.

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award

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**
 - l. **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.



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

Copy From

Line Items ?

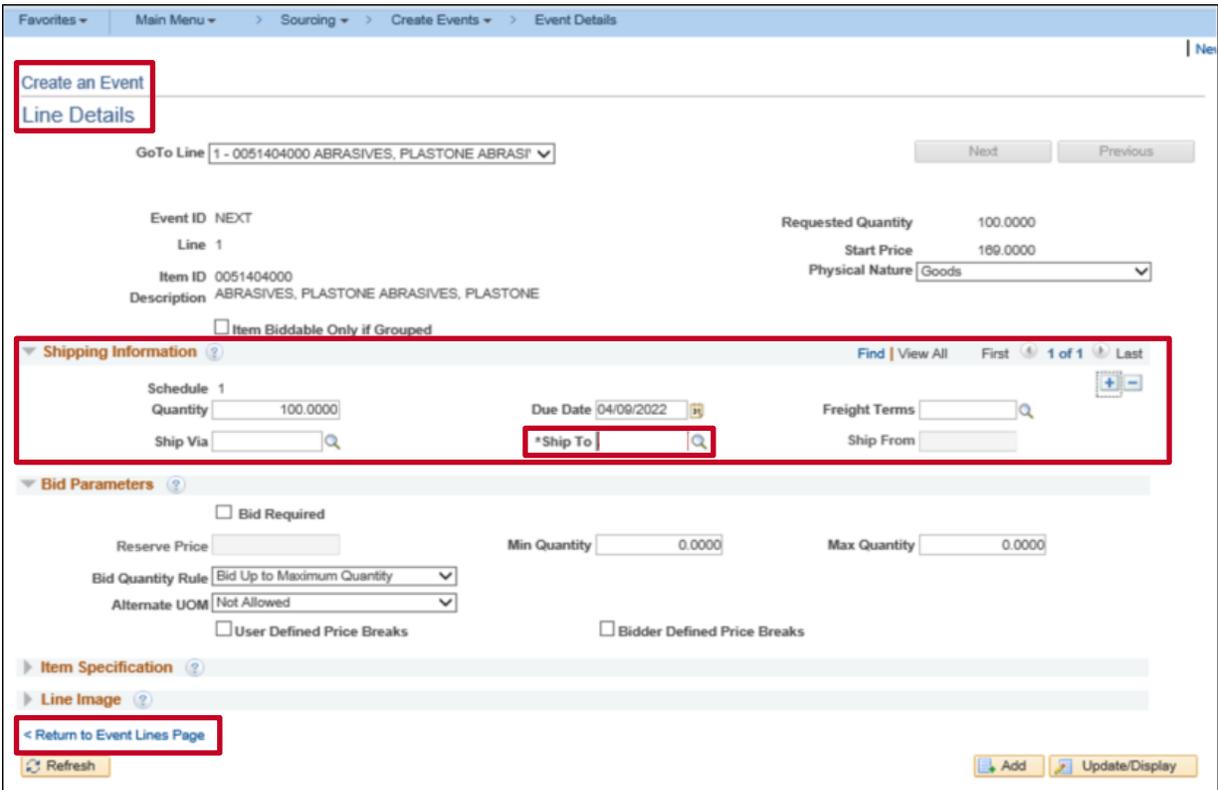
Basic Definition **Advanced Definition**

| Line | Item ID | Description | Bidder Display Seq # | Item SetID | Belongs to or Contains | Details |
|----------------------------|---|---|--------------------------------|------------|------------------------|-------------------------|
| <input type="checkbox"/> 1 | <input type="text" value="0051404000"/> | ABRASIVES, PLASTONE ABRASIVES, PLASTONE | <input type="text" value="1"/> | STATE | | Details |

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

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award

The **Line Details** page displays.



[Create an Event](#)
[Line Details](#)

GoTo Line 1 - 0051404000 ABRASIVES, PLASTONE ABRASF

Event ID NEXT Requested Quantity 100.0000
 Line 1 Start Price 169.0000
 Item ID 0051404000 Physical Nature Goods
 Description ABRASIVES, PLASTONE ABRASIVES, PLASTONE

Item Biddable Only if Grouped

Shipping Information Find | View All First 1 of 1 Last

Schedule 1
 Quantity 100.0000 Due Date 04/09/2022
 Ship Via *Ship To Freight Terms Ship From

Bid Parameters

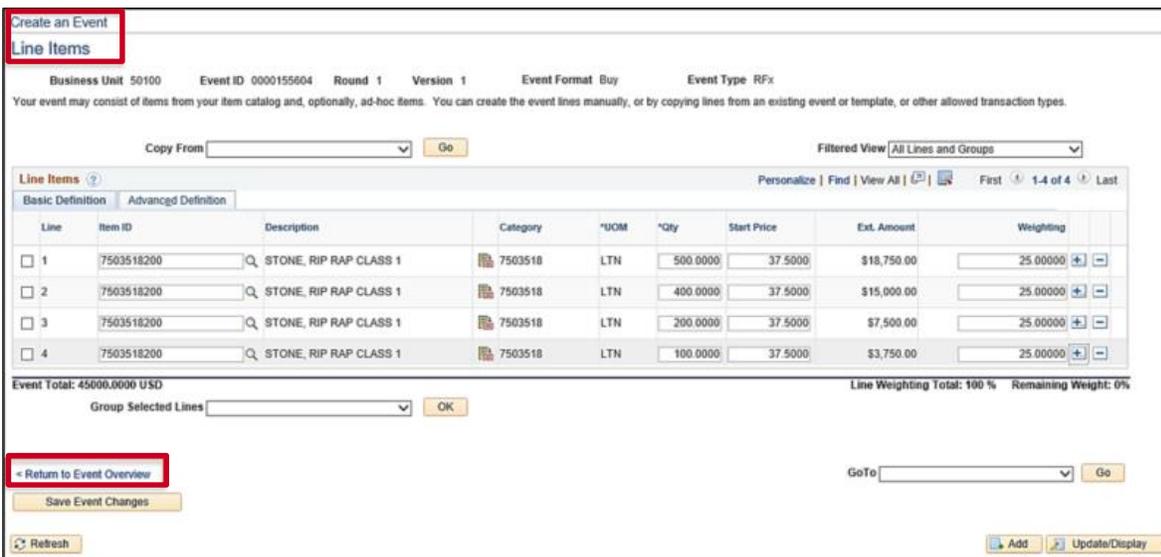
Bid Required
 Reserve Price Min Quantity 0.0000 Max Quantity 0.0000
 Bid Quantity Rule Bid Up to Maximum Quantity
 Alternate UOM Not Allowed
 User Defined Price Breaks Bidder Defined Price Breaks

Item Specification
Line Image

[< Return to Event Lines Page](#)

[Refresh](#) [Add](#) [Update/Display](#)

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.



[Create an Event](#)
[Line Items](#)

Business Unit 50100 Event ID 0000155604 Round 1 Version 1 Event Format Buy Event Type RFX
 Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From Go Filtered View All Lines and Groups

Line Items Personalize | Find | View All First 1-4 of 4 Last

| Line | Item ID | Description | Category | UOM | Qty | Start Price | Ext. Amount | Weighting |
|----------------------------|------------|------------------------|----------|-----|----------|-------------|-------------|-----------|
| <input type="checkbox"/> 1 | 7503518200 | STONE, RIP RAP CLASS 1 | 7503518 | LTN | 500.0000 | 37.5000 | \$18,750.00 | 25.00000 |
| <input type="checkbox"/> 2 | 7503518200 | STONE, RIP RAP CLASS 1 | 7503518 | LTN | 400.0000 | 37.5000 | \$15,000.00 | 25.00000 |
| <input type="checkbox"/> 3 | 7503518200 | STONE, RIP RAP CLASS 1 | 7503518 | LTN | 200.0000 | 37.5000 | \$7,500.00 | 25.00000 |
| <input type="checkbox"/> 4 | 7503518200 | STONE, RIP RAP CLASS 1 | 7503518 | LTN | 100.0000 | 37.5000 | \$3,750.00 | 25.00000 |

Event Total: 45000.0000 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](#)

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 it.

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

The **Invite Bidders** page displays.

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

Create an Event

Invite Bidders

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

Public Event

Bidder Invitation List Personalize | Find | View All | First 1 of 1 Last

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

Search for Bidders Dispatch Lines Save Bidders as Group

 Go To

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 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.

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.

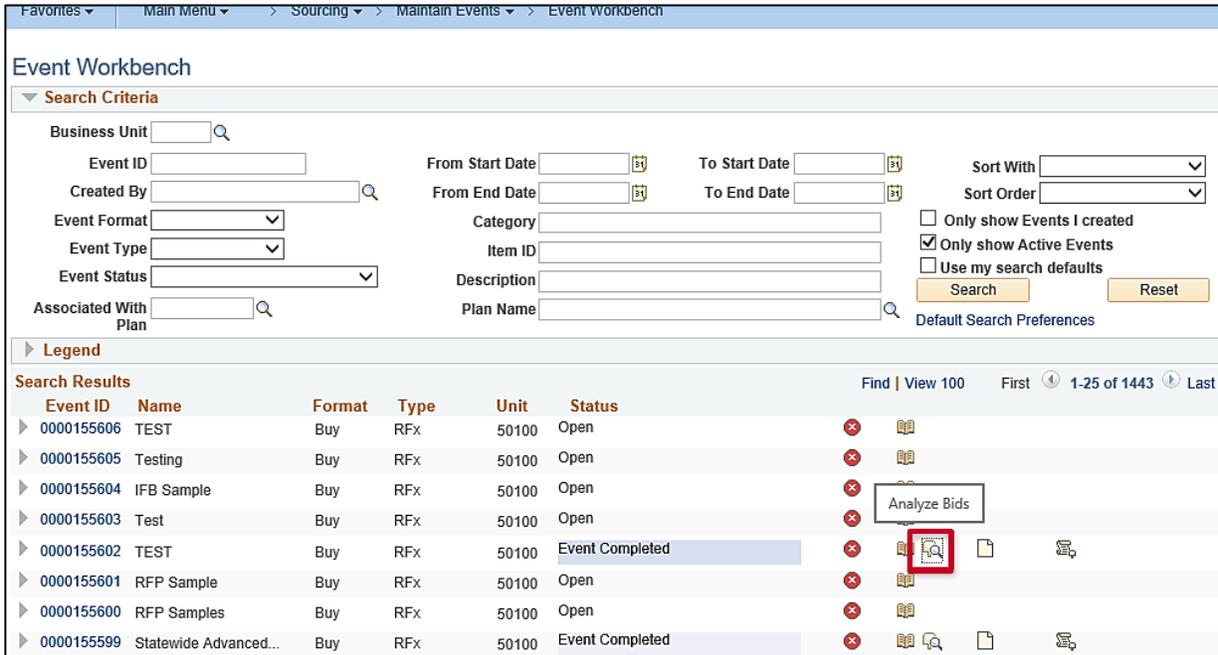
eVA returns bidder information and bid responses back into Cardinal. Bids are then available to be analyzed in Cardinal. Once you have analyzed bids, Strategic Sourcing enables you to make awards per your determination.

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



The screenshot shows the 'Event Workbench' interface. At the top, there is a breadcrumb trail: 'Favorites > Main Menu > Sourcing > Maintain Events > Event Workbench'. Below this is the 'Event Workbench' title and a 'Search Criteria' section. The search criteria section includes various input fields: Business Unit, Event ID, Created By, Event Format, Event Type, Event Status, Associated With Plan, From Start Date, To Start Date, From End Date, To End Date, Category, Item ID, Description, Plan Name, Sort With, 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, and Status. The table contains several rows of data. The row with Event ID '0000155602' and Status 'Event Completed' is highlighted. To the right of this row, there is a red box around an icon that says 'Analyze Bids'.

| Event ID | Name | Format | Type | Unit | Status |
|------------|-----------------------|--------|------|-------|-----------------|
| 0000155606 | TEST | Buy | RFx | 50100 | Open |
| 0000155605 | Testing | Buy | RFx | 50100 | Open |
| 0000155604 | IFB Sample | Buy | RFx | 50100 | Open |
| 0000155603 | Test | Buy | RFx | 50100 | Open |
| 0000155602 | TEST | Buy | RFx | 50100 | Event Completed |
| 0000155601 | RFP Sample | Buy | RFx | 50100 | Open |
| 0000155600 | RFP Samples | Buy | RFx | 50100 | Open |
| 0000155599 | Statewide Advanced... | Buy | RFx | 50100 | Event Completed |

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

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award

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 Residency |
| Event Format: Buy | Event Type: RFx | Currency: USD | End Date: 01/31/2012 11:00AM EST | Status: Pending Award |
| | | | | Go To: <input type="text" value="..."/> |

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

Analysis

Bidder Name **Luck Stone Corp**

Event Version Responded To 2

Bid Number 1 [?](#)

Total Bid Amount 43,410.00

Total Bid Cost 0.00
 Total Event Score 0.00
 Total Header Cost 0.00
 Total Header Score 0.00

Bid Action

Reject Reason

Award by Percent

Hide Bid

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

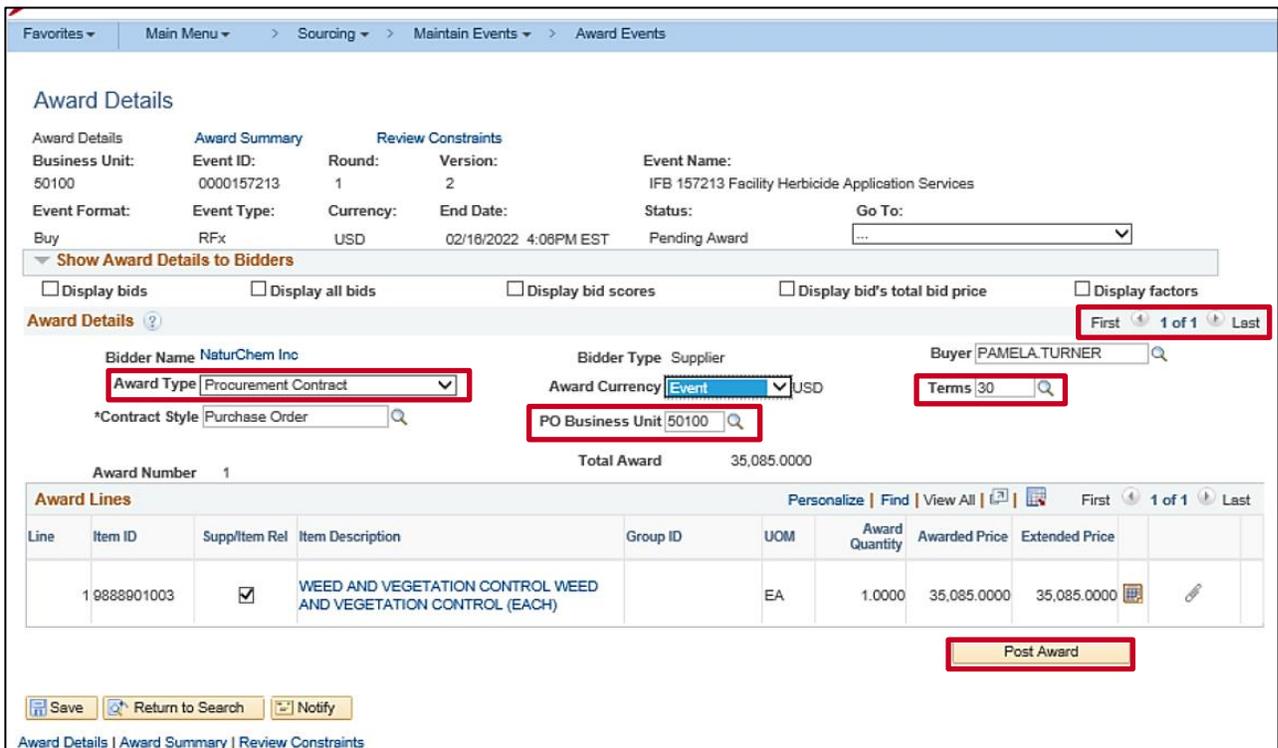
3. The **Total Bid Amount** by Bidder displays.
4. In the column related to each winning Bidder, select the **Bid Action** of **Award**.
5. In the column related to each winning Bidder, set the **Award by Percent**. You could choose to allocate a portion of the event award to multiple bidders using the **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**.

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award

The **Award Details** page displays.



Award Details

Award Details | Award Summary | Review Constraints

Business Unit: 50100 | Event ID: 0000157213 | Round: 1 | Version: 2 | Event Name: IFB 157213 Facility Herbicide Application Services

Event Format: Buy | Event Type: RFx | Currency: USD | End Date: 02/16/2022 4:08PM 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 (1 of 1)

Bidder Name: NaturChem Inc | Bidder Type: Supplier | Buyer: PAMELA.TURNER

Award Type: Procurement Contract | **Award Currency**: Event | USD | **Terms**: 30

*Contract Style: Purchase Order | **PO Business Unit**: 50100

Award Number: 1 | Total Award: 35,085.0000

| Line | Item ID | Suppl/Item Rel | Item Description | Group ID | UOM | Award Quantity | Awarded Price | Extended Price |
|------|------------|-------------------------------------|--|----------|-----|----------------|---------------|----------------|
| 1 | 9888901003 | <input checked="" type="checkbox"/> | WEED AND VEGETATION CONTROL WEED AND VEGETATION CONTROL (EACH) | | EA | 1.0000 | 35,085.0000 | 35,085.0000 |

Post Award

Save | Return to Search | Notify

Award Details | Award Summary | 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.

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award

The **Contract Entry – Contract** page displays.

Favorites ▾ Main Menu ▾ > Sourcing ▾ > Maintain Events ▾ > Award Events > Add/Update Contracts

Contract Entry

Contract

*Contract ID **000000000000000000045034**
 *Status **Open**
 Administrator/Buyer

Contract Version
 Version **1** Status **Current**
 New Version Approval Due Date

▼ Header ?

| | | |
|---|----------------------|----------------------------|
| *Contract Style Purchase Order | Add Comments | Activity Log |
| Process Option Purchase Order | Contract Activities | Document Status |
| *Supplier A SERVICES-001 Supplier Search | Primary Contact Info | Thresholds & Notifications |
| *Supplier ID 0000004600 A Services Group LLC | Contract Releases | Contract Reference |
| *Begin Date 01/31/2017 | | |
| Expire Date <input type="text"/> | | |
| Renewal Date <input type="text"/> | | |
| Currency USD CRRNT | | |
| Primary Contact 1 Tommy Vickers | | |
| Supplier Contract Ref <input type="text"/> | | |
| Description TEST RFX By Total | | |
| Master Contract ID <input type="text"/> | | |
| Tax Exempt ID <input type="text"/> | | |
| <input type="checkbox"/> Tax Exempt | | |

Amount Summary ?

| | | |
|---------------------------|------------------|-----|
| Maximum Amount | 35,000.00 | USD |
| Line Item Released Amount | 0.00 | |
| Category Released Amount | 0.00 | |
| Open Item Released Amount | 0.00 | |
| Total Released Amount | 0.00 | |
| <hr/> | | |
| Remaining Amount | 35,000.00 | |
| Remaining Percent | 100.00 | |

▼ Order Contract Options ?

| | | | |
|--|--|--|---|
| <input checked="" type="checkbox"/> Allow Multicurrency PO | <input type="checkbox"/> Allow Open Item Reference | <input type="checkbox"/> Must Use Contract Rate Date | Rate Date 01/31/2017 |
| <input checked="" type="checkbox"/> Corporate Contract | <input type="checkbox"/> Adjust Supplier Pricing First | <input checked="" type="checkbox"/> Auto Default | |
| <input type="checkbox"/> Lock Chartfields | <input type="checkbox"/> Price Can Be Changed on Order | *Dispatch Method Print | <input type="button" value="Dispatch"/> |
| PO Defaults | Add Open Item Price Adjustments | Price Adjustment Template | |

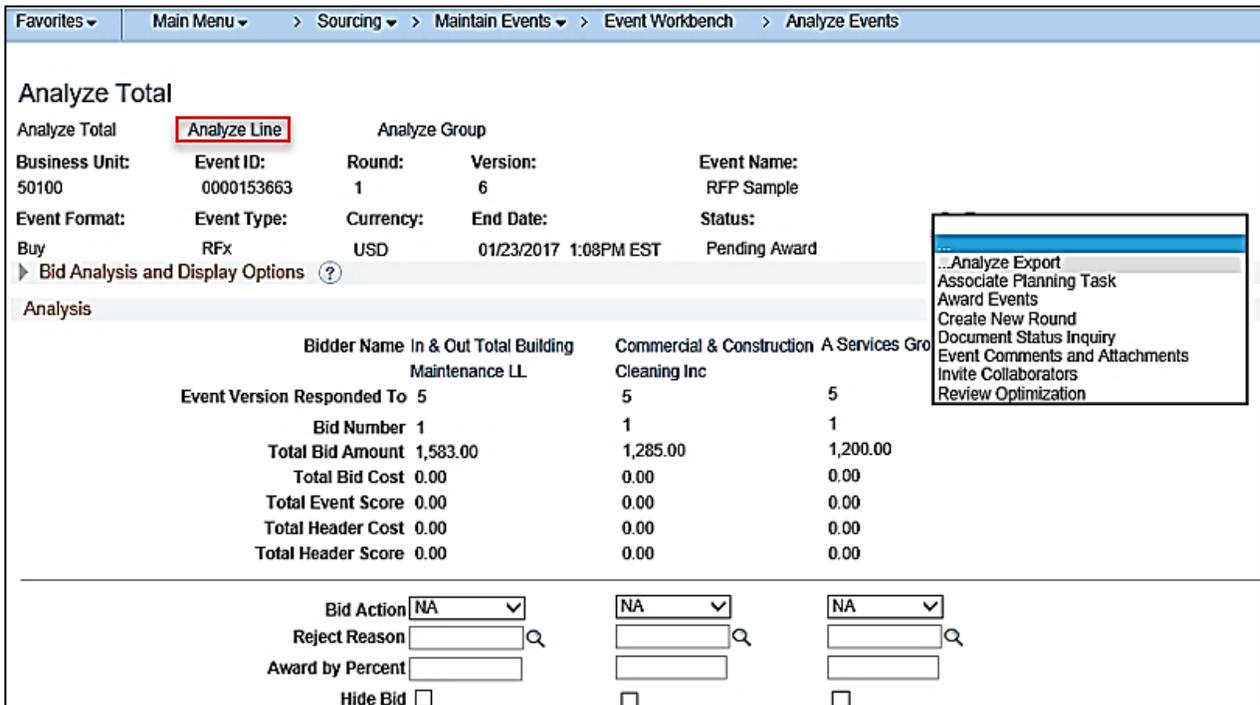
13. The Purchase Order award displays. A **Contract ID** generates and displays.

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award
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 [Analyze Bids & Award Event – By Total](#) section of this job aid, steps 1-2:

Main Menu > Sourcing > Maintain Events > Event Workbench


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

The first **Analyze Line** page displays.



501 PR345: Strategic Sourcing Event Set Up, Analyze and Award

- 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 Menu ▾ > Sourcing ▾ > Maintain Events ▾ > Event Workbench > Analyze Events

Analyze Line

Business Unit: 50100 Event ID: 0000153663 Round: 1 Version: 7 Event Name: RFP Sample
 Event Format: Buy Event Type: RFX Currency: USD End Date: 01/23/2017 1:08PM EST Status: Pending Award

Line 2 Requested Quantity: 1.0000 UOM: RO Start Price: 0.01000
 Item ID: 0051404055 Item Description: ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT Weighting: [Previous Line](#) [Next Line](#)

> Bid Analysis and Display Options

Analysis

| | | |
|-------------------------|----------------------|--|
| Bidder Name | A Services Group LLC | Commercial & Construction In & Out Total Building Maintenance LL |
| | | Cleaning Inc |
| Event Version | 5 | 5 |
| Bid Number | 1 | 1 |
| Bid Quantity | 1.0000 | 1.0000 |
| Minimum Bid Quantity | 0.0000 | 0.0000 |
| Total Bid Amount | 200.0000 | 285.0000 |
| Total Bid Cost | 0.00 | 0.00 |
| Total Line Score | 100.0000 | 5.5600 |
| | | 0.0000 |

Bid Action: Award ▾ NA ▾ NA ▾
 Reject Reason Code:
 Award by Percent:
 Award Quantity: 1.0000

Hide Bid

> **Factors**

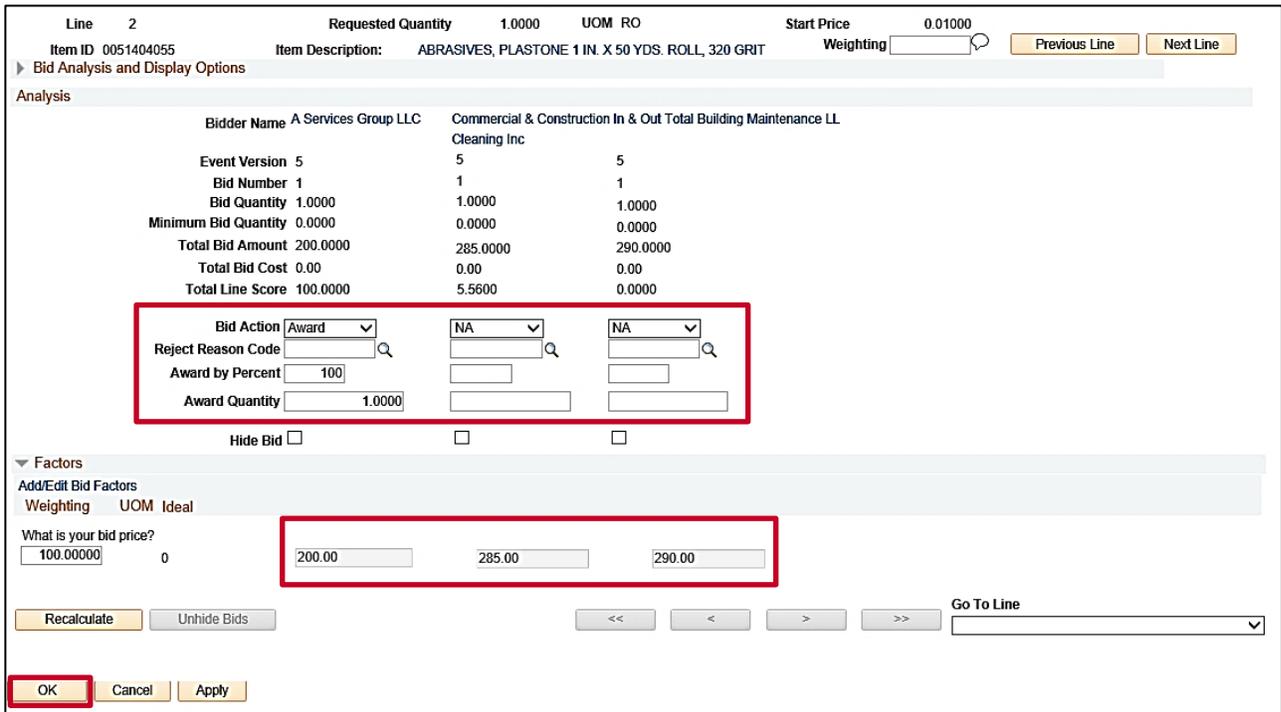
[Recalculate](#) [Unhide Bids](#) << < > >> **Go To Line** ▾

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

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

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award

The **Unit Price** bid response displays in the **Factors** section.



Line 2 Requested Quantity 1.0000 UOM RO Start Price 0.01000

Item ID 0051404055 Item Description: ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT Weighting Previous Line Next Line

Bid Analysis and Display Options

Analysis

Bidder Name A Services Group LLC Commercial & Construction In & Out Total Building Maintenance LL
Cleaning Inc

Event Version 5 5 5

Bid Number 1 1 1

Bid Quantity 1.0000 1.0000 1.0000

Minimum Bid Quantity 0.0000 0.0000 0.0000

Total Bid Amount 200.0000 285.0000 290.0000

Total Bid Cost 0.00 0.00 0.00

Total Line Score 100.0000 5.5600 0.0000

Bid Action Award NA NA

Reject Reason Code

Award by Percent 100

Award Quantity 1.0000

Hide Bid

Factors

Add/Edit Bid Factors

Weighting UOM Ideal

What is your bid price?

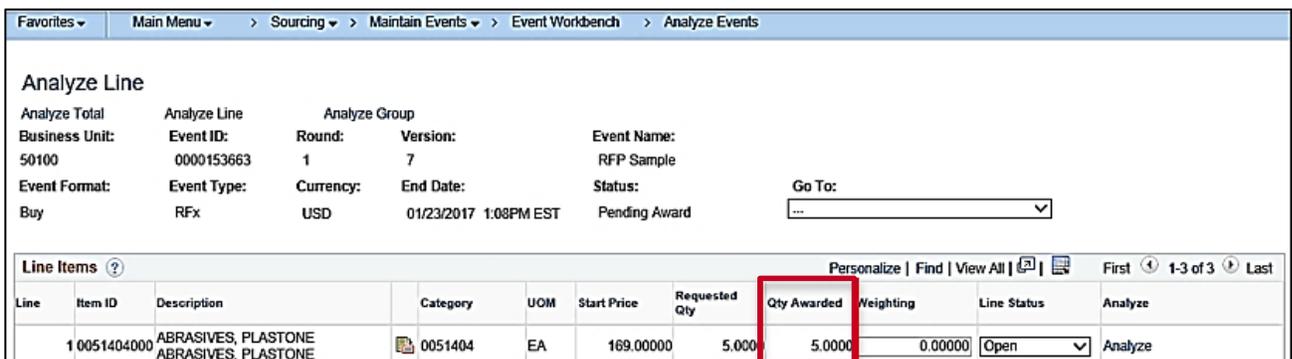
100.00000 0 200.00 285.00 290.00

Recalculate Unhide Bids << < > >> Go To Line

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.



Favorites Main Menu Sourcing Maintain Events Event Workbench Analyze Events

Analyze Line

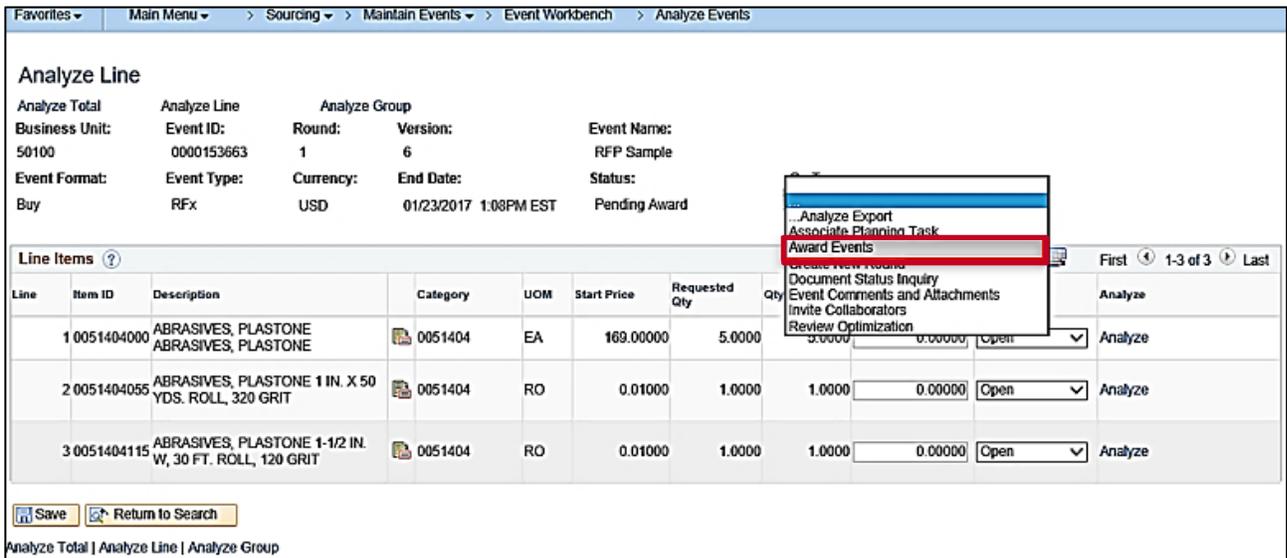
Analyze Total Analyze Line Analyze Group

Business Unit: 50100 Event ID: 0000153663 Round: 1 Version: 7 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: ...

| 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 | 5.000 | 5.0000 | 0.00000 | Open | Analyze |

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

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award


Analyze Line

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

| Line | Item ID | Description | Category | UOM | Start Price | Requested Qty | Qty | Start Price | Requested Qty | Qty | Start Price | Requested Qty | Qty | Start Price | Requested Qty | Qty | Analyze |
|------|------------|--|----------|-----|-------------|---------------|--------|-------------|---------------|---------|-------------|---------------|---------|-------------|---------------|---------|---------|
| 1 | 0051404000 | ABRASIVES, PLASTONE ABRASIVES, PLASTONE | 0051404 | EA | 169.00000 | 5.0000 | 5.0000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | Analyze |
| 2 | 0051404055 | ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT | 0051404 | RO | 0.01000 | 1.0000 | 1.0000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | Analyze |
| 3 | 0051404115 | ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT | 0051404 | RO | 0.01000 | 1.0000 | 1.0000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | 0.00000 | Analyze |

Save Return to Search

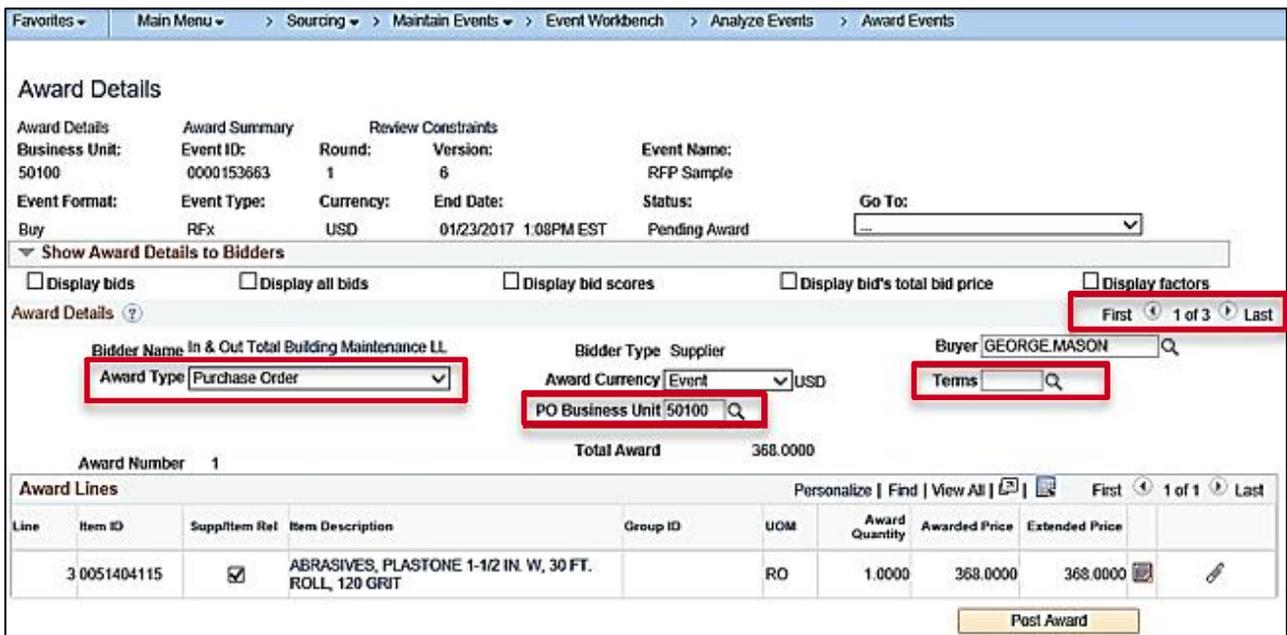
Analyze Total | Analyze Line | Analyze Group

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.



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

Bidder Name: In & Out Total Building Maintenance LL Bidder Type: Supplier Buyer: GEORGE.MASON

Award Type: Purchase Order Award Currency: Event USD **PO Business Unit: 50100** **Terms**

Award Number: 1 Total Award: 368.0000

| Line | Item ID | Supplier Ref | 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 | |

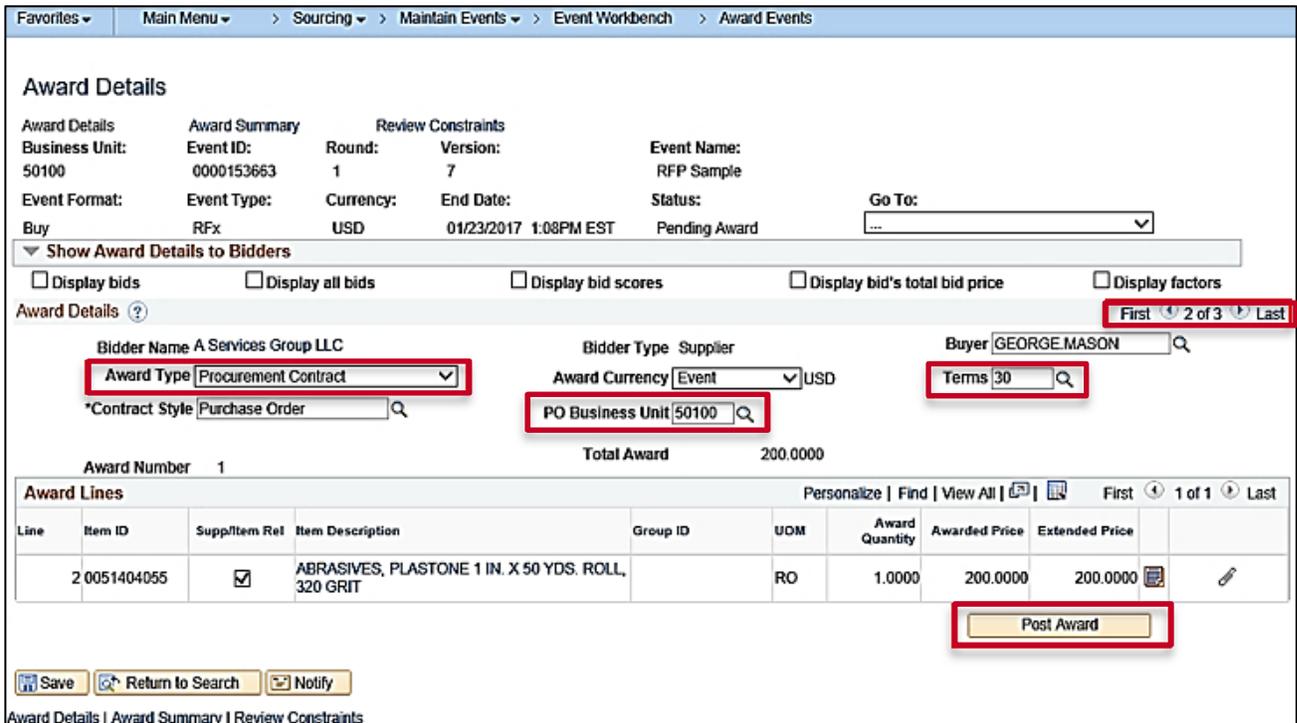
Post Award

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**.

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award

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.



Award Details

Award Details Award Summary Review Constraints

Business Unit: 50100 Event ID: 0000153663 Round: 1 Version: 7 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 2 of 3 Last

Bidder Name: A Services Group LLC Bidder Type: Supplier Buyer: GEORGE.MASON

Award Type: Procurement Contract Award Currency: Event USD Terms: 30

*Contract Style: Purchase Order PO Business Unit: 50100

Award Number: 1 Total Award: 200.0000

| Line | Item ID | Suppl/Item Rel | Item Description | Group ID | UDM | Award Quantity | Awarded Price | Extended Price |
|------|------------|-------------------------------------|--|----------|-----|----------------|---------------|----------------|
| 2 | 0051404055 | <input checked="" type="checkbox"/> | ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT | | RO | 1.0000 | 200.0000 | 200.0000 |

Post Award

Save Return to Search Notify

Award Details | Award Summary | Review Constraints

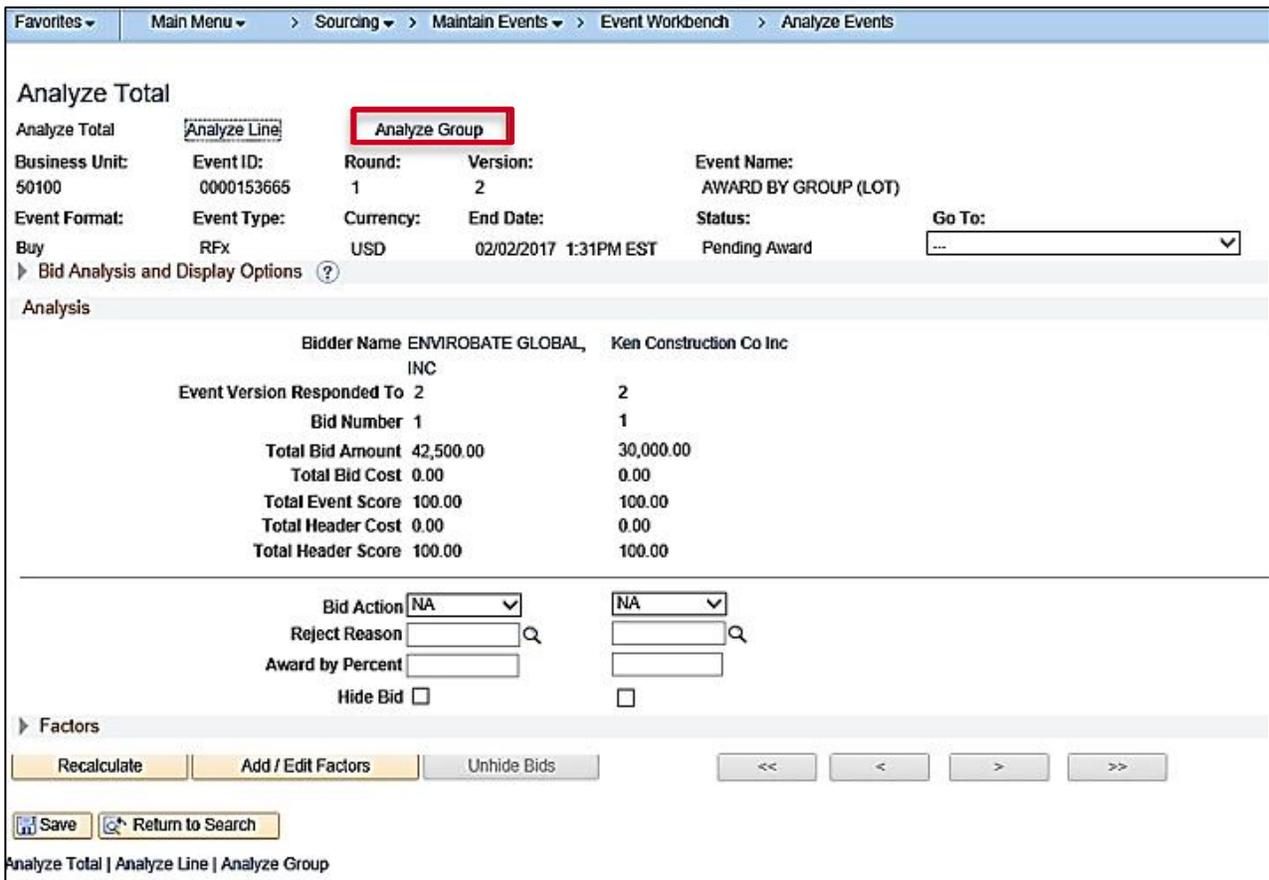
16. The second awarded Bidder displays. In this example, the second Bidder has been awarded all of **Line 2**.
17. Enter the **Award Type** of either **PO** or **Procurement Contract**.
18. Confirm/update the **PO Business Unit**.
19. Confirm/update the payment **Terms**.
20. Click the **Post Award**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

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award
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.

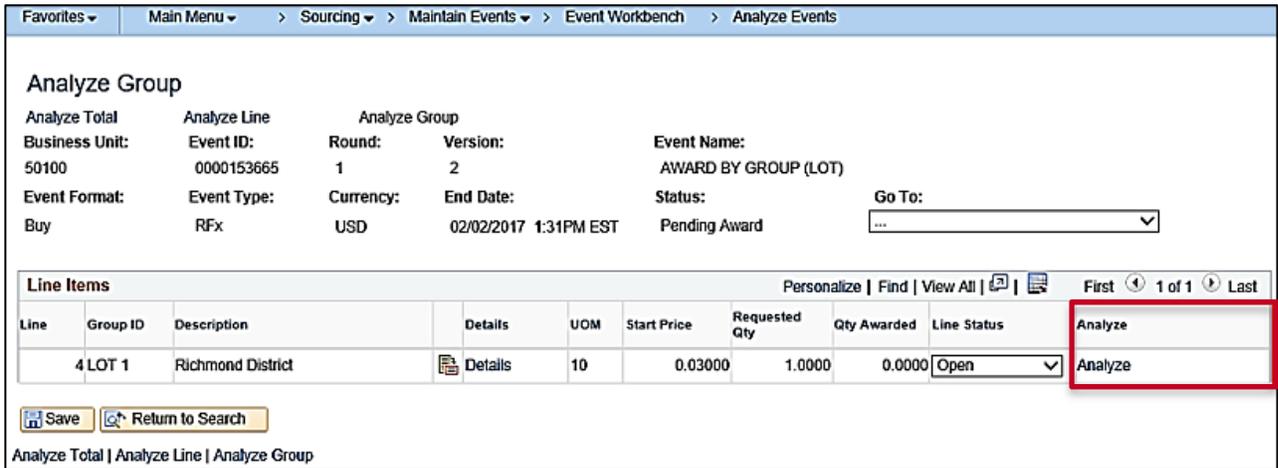
See the [Analyze Bids & Award Event – By Total](#) section of this job aid, steps 1-2:

Main Menu > Sourcing > Maintain Events > Event Workbench


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

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award

The **Analyze Group** page displays.



Analyze Group

Analyze Total Analyze Line Analyze Group

Business Unit: 50100 Event ID: 0000153665 Round: 1 Version: 2 Event Name: AWARD BY GROUP (LOT)

Event Format: Buy Event Type: RFX Currency: USD End Date: 02/02/2017 1:31PM EST Status: Pending Award Go To: ...

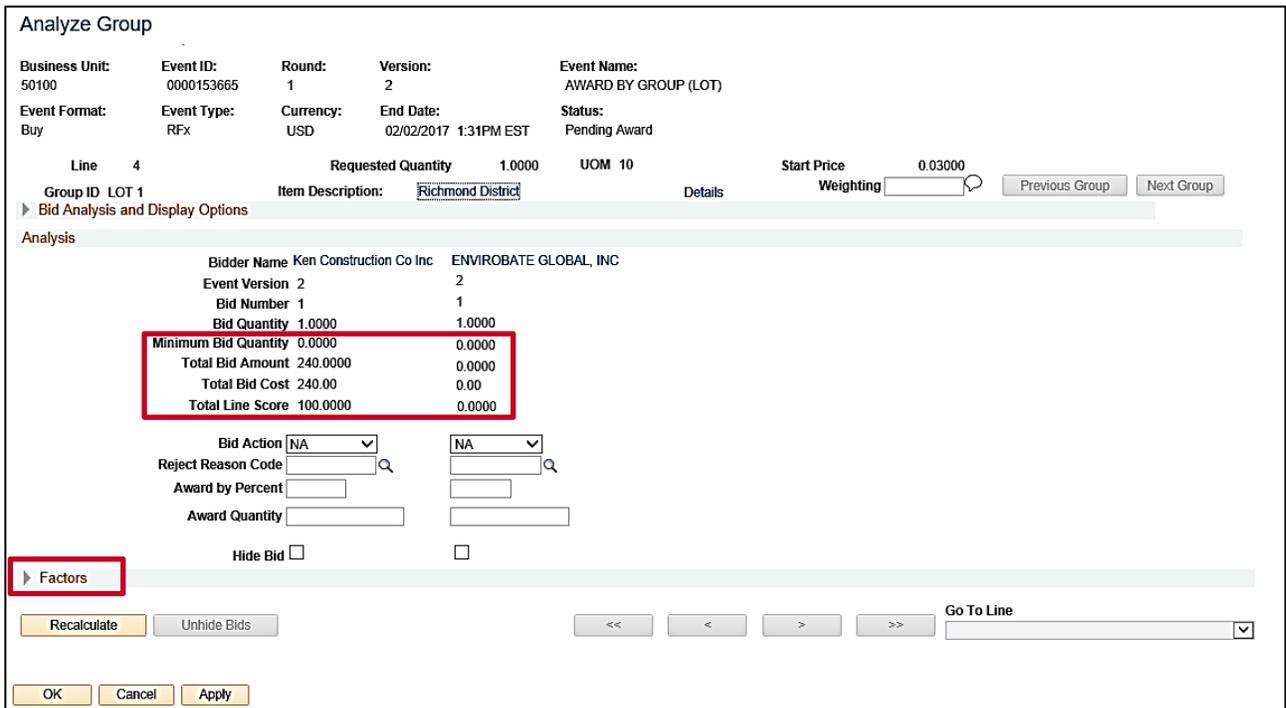
| Line | Group ID | Description | Details | UOM | Start Price | Requested Qty | Qty Awarded | Line Status | Analyze |
|------|----------|-------------------|---------|-----|-------------|---------------|-------------|-------------|---------|
| 4 | LOT 1 | Richmond District | Details | 10 | 0.03000 | 1.0000 | 0.0000 | Open | Analyze |

Save Return to Search

Analyze Total | Analyze Line | Analyze Group

- 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 Group

Business Unit: 50100 Event ID: 0000153665 Round: 1 Version: 2 Event Name: AWARD BY GROUP (LOT)

Event Format: Buy Event Type: RFX Currency: USD End Date: 02/02/2017 1:31PM EST Status: Pending Award

Line 4 Requested Quantity 1.0000 UOM 10 Start Price 0.03000

Group ID LOT 1 Item Description: Richmond District Details Weighting Previous Group Next Group

▶ Bid Analysis and Display Options

Analysis

| | | |
|----------------------|-------------------------|------------------------|
| Bidder Name | Ken Construction Co Inc | ENVIROBATE GLOBAL, INC |
| Event Version | 2 | 2 |
| Bid Number | 1 | 1 |
| Bid Quantity | 1.0000 | 1.0000 |
| Minimum Bid Quantity | 0.0000 | 0.0000 |
| Total Bid Amount | 240.0000 | 0.0000 |
| Total Bid Cost | 240.00 | 0.00 |
| Total Line Score | 100.0000 | 0.0000 |

Bid Action: NA NA

Reject Reason Code:

Award by Percent:

Award Quantity:

Hide Bid:

▶ **Factors**

Recalculate Unhide Bids << < > >> Go To Line

OK Cancel Apply

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

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award

▼ 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 << < > >>

Save Return to Search

Analyze Total | Analyze Line | Analyze Group

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

Favorites Main Menu Sourcing Maintain Events Event Workbench Analyze Events

Analyze Group

Business Unit: 50100 Event ID: 0000153685 Round: 1 Version: 2 Event Name: AWARD BY GROUP (LOT)
 Event Format: Buy Event Type: RFX Currency: USD End Date: 02/02/2017 1:31PM EST Status: Pending Award

Line 4 Requested Quantity 1.0000 UOM 10 Start Price 0.03000
 Group ID LOT 1 Item Description: Richmond District Details Weighting Previous Group Next Group

► Bid Analysis and Display Options

Analysis

| | | |
|----------------------|-------------------------|------------------------|
| Bidder Name | Ken Construction Co Inc | ENVIROBATE GLOBAL, INC |
| Event Version | 2 | 2 |
| Bid Number | 1 | 1 |
| Bid Quantity | 1.0000 | 1.0000 |
| Minimum Bid Quantity | 0.0000 | 0.0000 |
| Total Bid Amount | 240.0000 | 0.0000 |
| Total Bid Cost | 240.00 | 0.00 |
| Total Line Score | 100.0000 | 0.0000 |

Bid Action Award NA

Reject Reason Code
 Award by Percent
 Award Quantity

Hide Bid

► Factors

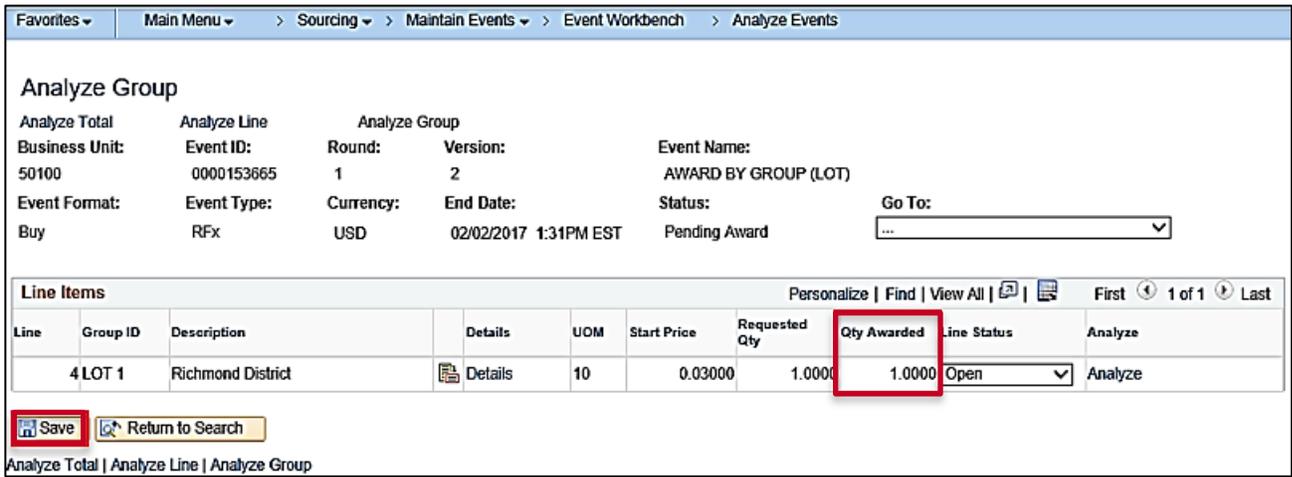
Recalculate Unhide Bids << < > >> Go To Line

OK Cancel Apply

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

501 PR345: Strategic Sourcing Event Set Up, Analyze and Award

The **Analyze Group** page displays.



Analyze Group

Analyze Total Analyze Line Analyze Group

Business Unit: Event ID: Round: Version: Event Name:

50100 0000153665 1 2 AWARD BY GROUP (LOT)

Event Format: Event Type: Currency: End Date: Status: Go To:

Buy RFX USD 02/02/2017 1:31PM EST Pending Award ...

| 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 |

Save Return to Search

Analyze Total | Analyze Line | Analyze Group

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, [steps 7-13](#).