



Strategic Sourcing Collaboration Overview

The Strategic Sourcing (SS) Buyer can select other Cardinal users, known as Collaborators, to participate in an event or in the bid analysis process.

The Strategic Sourcing Buyer who is responsible for the event may not have all of the information that is critical to the event. In those circumstances, the Strategic Sourcing Buyer may choose to distribute the event to the stakeholders for input prior to posting the event. This allows them to get everyone's input into the event and ensure that everyone agrees on the overall objectives of the procurement.

Collaboration is also useful during bid analysis. By allowing stakeholders to review the bids and provide input on bid factor weightings, text-based scoring and the like, the buyer can be certain that the interests of all the collaborators are factored in on the award decision. The system calculates an average score based on the input of all the collaborators.

The Strategic Sourcing Buyer can accept or reject suggested changes by a Collaborator. However, the event cannot be posted while collaborators are reviewing the event.

Collaborators may include customers (Cardinal users), supervisors, subject matter experts (SME), Evaluation Committee members, and others who have the Cardinal role of Event Collaborator.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

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Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
12/6/2021	Baseline.

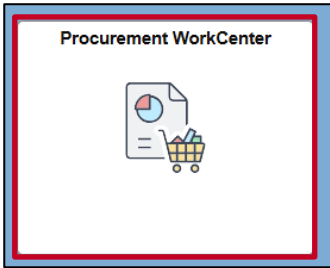
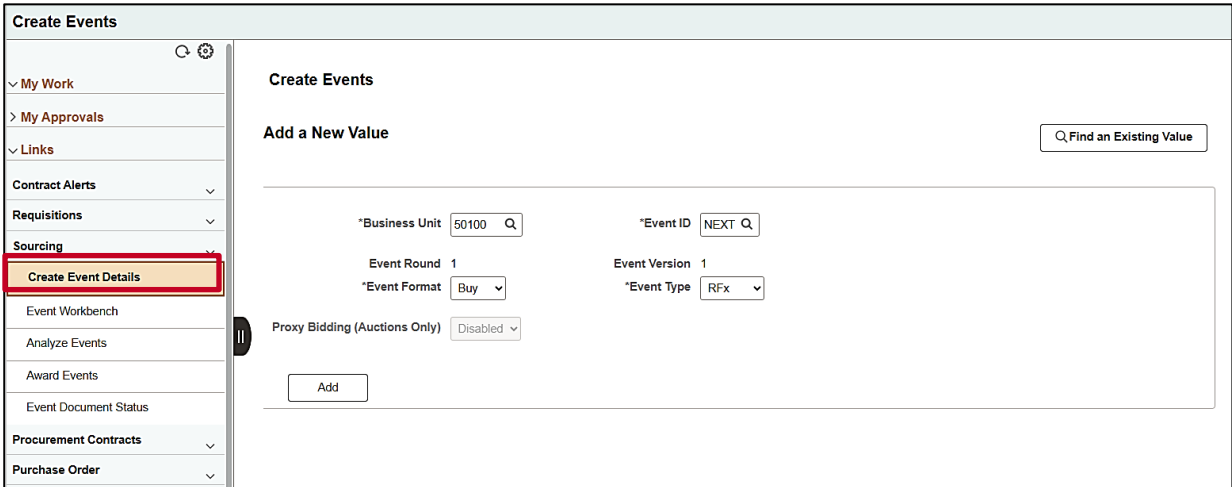
Event Collaboration

Invite Event Collaborators (Strategic Sourcing Buyer)

The Strategic Sourcing Buyer selects users with the Event Collaborator role and adds them to an Event that is being created. Events do not route to managers, or any other users, unless they are selected as Collaborators.

A routing sequence is established when inviting more than one Collaborator. This sequence may be modified to ensure the Event is reviewed by the Collaborators in a specific order.

In the instructions below, Steps 1-7 outline how to look up an Event with the status of “Open” to invite Collaborators to work on it. If adding Collaborators while initially creating the Event, proceed to Step 8.

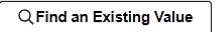
Step	Action
1.	Navigate to the Create Events page by clicking the Procurement WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation in the WorkCenter: Links > Sourcing > Create Event Details Note: WorkCenter sections, folders, and pages may vary based on the user’s Security roles. 

Step	Action
	Users can also access the Create Events page using the following navigation path: NavBar > Menu > Sourcing > Create Events > Create Event Details

The **Create Events Add a New Value** page displays.

Create Events

Add a New Value



*Business Unit

50100

*Event ID

NEXT

Event Round

1

Event Version

1

*Event Format

Buy

*Event Type

RFX

Proxy Bidding (Auctions Only)

Disabled

Add

3.	Click the Find an Existing Value button. 
----	--

The **Create Events Find an Existing Value** page displays.

Create Events

Find an Existing Value



Search Criteria

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

Recent Searches

Choose from recent searches

Saved Searches

Choose from saved searches

*Business Unit

=

50100

Event ID

begins with

Event Round

=

Event Version

=

Event Format

=

Event Type

=

Event Name

begins with

Event Status

=

Show fewer options

☐ Case Sensitive

Search

Clear



Procurement Job Aid

PR345 Strategic Sourcing Collaboration (VDOT Only)

Step	Action
4.	The Business Unit field will default. Do not change this value. *Business Unit = ▼ 50100 Q
5.	Enter search criteria, such as Event ID, for the event. Event ID begins with ▼ 000016
6.	Click the Search button. Search Clear

Search results display in the **Search Results** section.

▼ Search Results								
Only the first 300 results can be displayed. - Business Unit "50100" Event ID "000016"								
<< < 1-100 of 300 ▼ > >> View All								
Business Unit	Event ID	Event Round	Event Version	Event Format	Event Type	Event Name	Event Status	
50100	0000160479	1	1	Buy	RFx	UIFB Steel Pipe Liner 2	Open	>
50100	0000160478	1	1	Buy	RFx	Pipe Liner Expansion Project	Open	>
50100	0000160477	1	1	Buy	RFx	Job Aid Testing	Posted	>
50100	0000160476	1	1	Buy	RFx	UIFB Steel Pipe Liner	Posted	>

7.

Click the applicable Event. The **Event Status** must be “Open”.

Event ID	Event Round	Event Version	Event Format	Event Type	Event Name	Event Status	
0000160479	1	1	Buy	RFx	UIFB Steel Pipe Liner 2	Open	>
0000160478	1	1	Buy	RFx	Pipe Liner Expansion Project	Open	>

Step	Action
------	--------

The **Modify an Event Event Summary** page displays.

Modify an Event

Event Summary

Business Unit 50100
Event ID 0000160479
Round 1
Version 1
Event Format Buy

Event Type RFX [Change to Auction](#)

Event Status Open

* Solicitation Type IFB Unsealed

Bid Category Code Supplies - Non-Technology

* Event Name UIFB Steel Pipe Liner 2

* Description UIFB160383 Steel Pipe Liner - Shipman Area Headquarters

Time Zone EDT

Preview Date 08/07/2026

Time 10:00

Start Date 08/13/2026

Time 13:00

End Date 08/14/2026

Time 13:00

Copy From

Go

eVA Interfaced NSEV eVA Dtm

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
Event Comments and Attachments
Event Header Bid Factors

Payment Terms and Contact Info
Event Constraints
Event Reminder Notification

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

Post

Save As Template

Preview PDF

Related Links:

Document Status Inquiry

View All Attachments for Event
Plan Task Associations

Last Updated By: 08/06/2026 13:18 EDT

Return to Search Refresh Add Update/Display



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Step	Action
8.	Click the Event Collaborators link under the Step 4: Invite Collaborators section. Step 4: Invite Collaborators Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it. Event Collaborators

The **Modify an Event Event Collaboration Details** page displays.

Modify an Event

Event Collaboration Details

Collaboration Due Date Time

Process Type

Review By Notifications

☐ Never ☐ One day before ☐ One week before ☐ Weekly before deadline ☐ Daily starting one week before

Review Sections

Seq Nbr Section Name Bid Factor Default Option

Process Type Section Review By Date Time

Collaborators

Seq Nbr	UserId	Name	Review By Date	Time	Delegate User ID	Name	Override Main Collaborator	Reviewed	Allow RFx Document Edit		
1							☐	☐	☐	+	-

Find Collaborators Save As Group

Add Section

OK Cancel Refresh

9.	In the Collaboration Due Date and Time fields, enter a deadline date and time for all collaboration to end. The Collaboration Due Date and Time must be prior to the Event's Preview Date and Time. Collaboration Due Date Time
----	---

10.

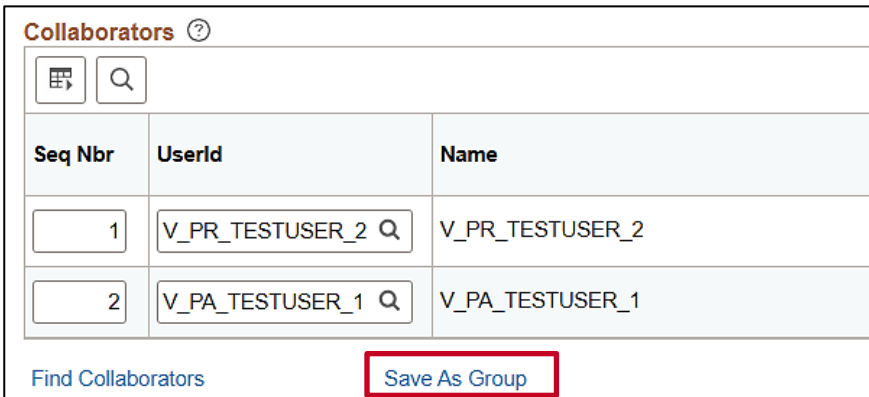
In the **Collaborators** section, enter the User ID of the user to collaborate on the Event. Click the **UserId** Lookup button to find a user or click the **Find Collaborators** link to look up a previously set up Collaborator Group.

Collaborators ?

Seq Nbr	Userid	Name
1	V_PR_TESTUSER_2	V_PR_TESTUSER_2

Find Collaborators

Save As Group

Step	Action
	Click the Add a new row (+) icon at the end of the row to add another Collaborator. Use the Delete row (-) icon to remove a Collaborator. 
	The routing sequence number is automatically populated in the Seq Nbr field as Collaborators are added. The sequence may be modified to ensure the event is reviewed by the Collaborators in the desired order. 
11.	Click the Save As Group link to save the selected Collaborators as a group for future use. 

The **Save As Group** page displays in a pop-up window.

Save As Group

×

Help

Name & Description ?

Name

Description

OK

Cancel

Refresh



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Step	Action															
12.	Enter a group name in the Name field. Name TEST REVIEWERS															
13.	Enter a brief description of the group in the Description field. Description Quality assurance for sourcing															
14.	Click the OK button. OK Cancel Refresh															
The Collaborators section redispays with the new group name. Collaborators ? <table><thead><tr><th>Seq Nbr</th><th>UserId</th><th>Name</th><th>Review By Date</th><th>Time</th></tr></thead><tbody><tr><td>1</td><td>V_PR_TESTUSER_2</td><td>V_PR_TESTUSER_2</td><td></td><td></td></tr><tr><td>2</td><td>V_PA_TESTUSER_1</td><td>V_PA_TESTUSER_1</td><td></td><td></td></tr></tbody></table> Find Collaborators Save As Group TEST REVIEWERS		Seq Nbr	UserId	Name	Review By Date	Time	1	V_PR_TESTUSER_2	V_PR_TESTUSER_2			2	V_PA_TESTUSER_1	V_PA_TESTUSER_1		
Seq Nbr	UserId	Name	Review By Date	Time												
1	V_PR_TESTUSER_2	V_PR_TESTUSER_2														
2	V_PA_TESTUSER_1	V_PA_TESTUSER_1														
15.	Once all the collaborators have been entered, click the OK button. OK Cancel Refresh															



Procurement Job Aid

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Step	Action
	The Modify an Event Event Summary page redispays. 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 Route Save As Template Preview PDF Related Links: Document Status Inquiry View All Attachments for Event Plan Task Associations Last Updated By: SPROUSE,PAMELA M 08/06/2026 13:18 EDT Return to Search Refresh Add Update/Display
16.	Click the Save Event button. Save Event
17.	Click the Route button to send the event to the first collaborator. Route

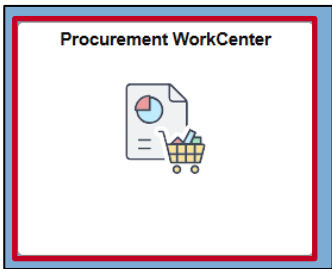
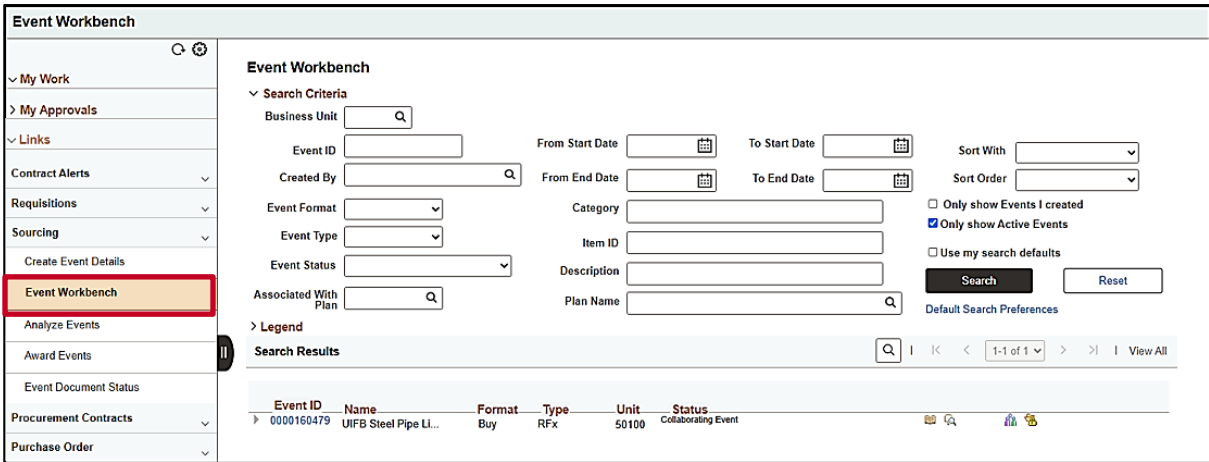
Step	Action		
i	An email notification is sent to each Collaborator. Collaboration Notice You have been appointed by to collaborate on event 50100-0000160479 Round 1 Version 1. The due date for your collaboration is 08/06/26 17:00. Click on the URL below to checkout the Sourcing event and enter your collaboration input. Event Details Event ID: 50100-0000160479 Round 1 Version 1 Name: UIFB Steel Pipe Liner 2 Event URL Collaborate on this event. An item is added to each Collaborator’s Event Workbench. Event ID Name Format Type Unit Status ▶ 0000160479 UIFB Steel Pipe Li... Buy RFx 50100 Collaborating Event The Event Status changes to “Collaborating Event”. Modify an Event Event Summary Business Unit 50100 Event ID 0000160479 Round 1 Event Type RFx Event Status Collaborating Event *Solicitation Type IFB Unsealed Bid Category Code Supplies - Non-Technology The Collaboration Status is set to “Available”. i Collaboration Status: Available Last Updated By: SPROUSE,PAMELA M Return to Search Refresh <tr><td> i </td><td> The Event Creator will receive a message when all collaboration is complete. </td></tr>	i	The Event Creator will receive a message when all collaboration is complete.
i	The Event Creator will receive a message when all collaboration is complete.		

Collaborate on an Event

The system sends an email notification to each invited Collaborator. The first Collaborator receives a notification immediately; the rest of the Collaborators receive a notification once the current Collaborator completes and submits collaboration input based on the routing sequence entered. Collaborators check out an event through the **Event Workbench**, make any changes, and then route the Event to the next Collaborator. Once the collaboration is done, the system notifies the Event creator by email.

As an Event Collaborator, access the Event using one of the following options:

- Click the **Collaborate on this event** link in the email notification
- Click the **Event ID** link in the **Event Workbench**.

Step	Action
1.	Navigate to the Event Workbench page by clicking the Procurement WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation in the WorkCenter: Links > Sourcing > Event Workbench Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 



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Step	Action												
	Users can also access the Event Workbench page using the following navigation path: NavBar > Menu > Sourcing > Maintain Events > Event Workbench												
The Event Workbench page displays.													
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 To Start Date To End Date Sort With Sort Order ☐ Only show Events I created ☒ Only show Active Events ☐ Use my search defaults Search Reset Default Search Preferences > Legend Search Results 1-1 of 1 View All <table><tr><th>Event ID</th><th>Name</th><th>Format</th><th>Type</th><th>Unit</th><th>Status</th></tr><tr><td>0000160479</td><td>UIFB Steel Pipe Li...</td><td>Buy</td><td>RFx</td><td>50100</td><td>Collaborating Event</td></tr></table>		Event ID	Name	Format	Type	Unit	Status	0000160479	UIFB Steel Pipe Li...	Buy	RFx	50100	Collaborating Event
Event ID	Name	Format	Type	Unit	Status								
0000160479	UIFB Steel Pipe Li...	Buy	RFx	50100	Collaborating Event								
3.	Click the Available for checkout icon.												
													



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Step	Action
	The Modify an Event Event Summary page displays. Modify an Event Event Summary Business Unit: 50100Event ID: 0000160479Round: 1Version: 1Event Format: Buy Event Type: RFxEvent Status: Collaborating EventSolicitation Type: IFB UnsealedBid Category Code: Supplies - Non-Technology *Event Name: UIFB Steel Pipe Liner 2 *Description: UIFB160383 Steel Pipe Liner - Shipman Area Headquarters Time Zone: EDTPreview Date: 08/07/2026Time: 10:00AMStart Date: 08/13/2026Time: 1:00PMEnd Date: 08/14/2026Time: 1:00PM Copy From: [Dropdown]Go eVA Interfaced: NSEV eVA Dttm: Preview By: By Line [Dropdown] 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 OptionsEvent Comments and AttachmentsEvent Header Bid Factors Payment Terms and Contact InfoEvent ConstraintsEvent Reminder Notification 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 View Collaboration 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 EventRoute Save As TemplatePreview PDF Related Links: Document Status Inquiry View All Attachments for EventPlan Task Associations Collaboration Status: Checked Out Checked Out By: V_PR_TESTUSER_2 Checked Out On: 08/06/2026 04:51 PM EDT Last Updated By: [Dropdown] Return to SearchRefresh



Step	Action
4.	Note that the Collaboration Status is “Checked Out” along with details about the checkout, such as when and by whom. Document Status Inquiry Collaboration Status: Checked Out Checked Out By: V_PR_TESTUSER_2 Checked Out On: 08/06/2026 04:51 PM EDT Last Updated By: Return to Search Refresh
5.	To make edits or add comments, click the Event Comments and Attachments link under Step 1: Define Event Basics. 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
The Modify an Event Event Comments and Attachments page displays. Modify an Event Event Comments and Attachments Event ID 0000160479 Enter Comments ⓘ < < 1 of 1 > > View All Comments: ☐ Send To Bidder ☐ Include On Award Standard Comments Add Attachment OK Cancel Refresh	



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Step	Action
6.	Enter comments in the Comments field. Comments: The event is well prepared and is approved to proceed with an advertisement - TST.
7.	Click the OK button. OK Cancel Refresh

The **Modify an Event Event Summary** page displays.

[Modify an Event](#)
Event Summary

Business Unit 50100 Event ID 0000160479 Round 1 Version 1 Event Format Buy

Event Type RFX

Event Status Collaborating Event

Solicitation Type IFB Unsealed

Bid Category Code Supplies - Non-Technology

*Event Name UIFB Steel Pipe Liner 2

*Description UIFB160383 Steel Pipe Liner - Shipman Area Headquarters

Time Zone EDT

Preview Date 08/07/2026

Start Date 08/13/2026

End Date 08/14/2026

Copy From

eVA Interfaced NSEV

Preview By: By Line

Time 10:00AM

Time 1:00PM

Time 1:00PM

Go

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
Event Reminder Notification

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

* Line Items

Item Line Defaults



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Step	Action																										
8.	To modify event lines, click the Line Items link under Step 2: Configure Line Items. Step 2: Configure Line Items Create line listings for this event. * Line Items																										
The Modify an Event Line Items page displays. Modify an Event Line Items Business Unit 50100 Event ID 0000160479 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 < < 1-1 of 1 > > View All Basic Definition Advanced Definition <table><tr><th></th><th>Line</th><th>Item ID</th><th>Description</th><th></th><th>Category</th><th>*UOM</th><th>*Qty</th><th>Start Price</th><th>Ext. Amount</th><th>Weighting</th><th></th><th></th></tr><tr><td>☐</td><td>1</td><td>6588012000</td><td>PIPE, STEEL PIPE, STEEL</td><td></td><td>6588012</td><td>LF</td><td>60</td><td>1275.0000</td><td>\$76,500.00</td><td>0</td><td>+</td><td>-</td></tr></table> Event Total: 76500.0000 USD Line Weighting Total: 0 % Remaining Weight: 100% Group Selected Lines OK < Return to Event Overview GoTo Go Save Event Changes Return to Search Refresh			Line	Item ID	Description		Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting			☐	1	6588012000	PIPE, STEEL PIPE, STEEL		6588012	LF	60	1275.0000	\$76,500.00	0	+	-
	Line	Item ID	Description		Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting																	
☐	1	6588012000	PIPE, STEEL PIPE, STEEL		6588012	LF	60	1275.0000	\$76,500.00	0	+	-															
9.	Update the Qty field (i.e., line quantity) for each line if needed. *Qty 100																										
10.	After completing any line edits, click the Save Event Changes button. Save Event Changes																										



Procurement Job Aid

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Step	Action
11.	Click the Return to Event Overview link. < Return to Event Overview Save Event Changes Return to Search Refresh
	The Modify an Event Event Summary page displays. Modify an Event Event Summary Business Unit 50100 Event ID 0000160479 Round 1 Version 1 Event Format Buy Event Type RFX Event Status Collaborating Event Solicitation Type IFB Unsealed Bid Category Code Supplies - Non-Technology *Event Name UIFB Steel Pipe Liner 2 *Description UIFB160383 Steel Pipe Liner - Shipman Area Headquarters Time Zone EDT Preview Date 08/07/2026 Start Date 08/13/2026 End Date 08/14/2026 Copy From eVA Interfaced NSEV Preview By: By Line Time 10:00AM Time 1:00PM Time 1:00PM Go 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 Event Reminder Notification Step 2: Configure Line Items Create line listings for this event. * Line Items Item Line Defaults
12.	Click the Route button to send the event to the next Collaborator. This routing is based on the routing sequence the event creator previously defined. Save Event Route



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Step	Action
	A routing confirmation message displays. Routing Collaboration Event to next Collaborator will check-in the event. Do you wish to proceed? (18058,199) If you have not finished reviewing the event, select "No", otherwise select "Yes". Yes No
13.	To check in the event and send it to the next Collaborator, click the Yes button. Yes No
	The Modify an Event Event Summary page displays. 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 View Collaboration 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 Route Preview PDF Related Links: Document Status Inquiry View All Attachments for Event View All Attachments for Event Plan Task Associations Return to Search Refresh



Procurement Job Aid

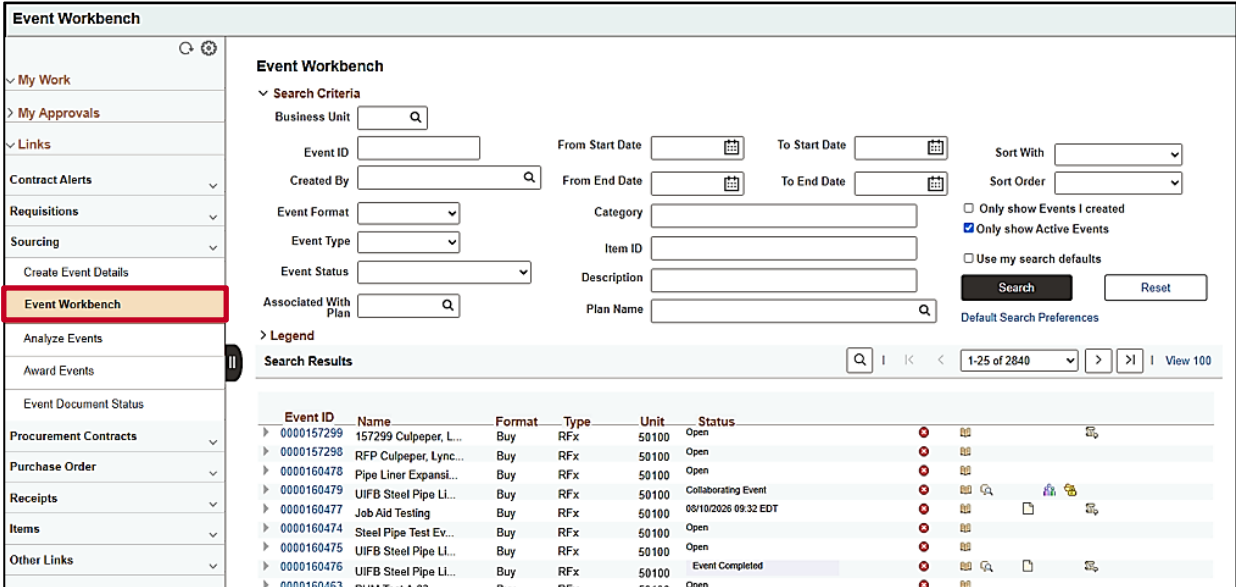
PR345 Strategic Sourcing Collaboration (VDOT Only)

Step	Action																									
	The event's Collaboration Status updates to "Available".  Collaboration Status: Available Last Updated By: V_PR_TESTUSER_2 Return to Search Refresh																									
14.	Click the View Collaboration link under Step 4: Invite Collaborators to see any collaboration changes and comments. Step 4: Invite Collaborators Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it. Event Collaborators View Collaboration																									
	The Review Event Collaboration page displays. Review Event Collaboration Business Unit 50100Event ID 0000160479Round 1Version 1 Event Name UIFB Steel Pipe Liner 2Format BuyType RFx Event HeaderInvited BiddersEvent LinesConstraintsBid FactorsComments and Attachments Filter By Event Parameters  Collaboration Input Comments » <table><thead><tr><th>Field</th><th>Name</th><th>Date/Time</th><th>Action</th><th>Value</th></tr></thead><tbody><tr><td></td><td></td><td></td><td></td><td></td></tr></tbody></table> Event Summary  Collaboration Input Comments » <table><thead><tr><th>Field</th><th>Name</th><th>Date/Time</th><th>Action</th><th>Value</th></tr></thead><tbody><tr><td>AUC_COLLAB_DUEDT</td><td>Original</td><td>08/06/2026 5:05:11PM</td><td>Update</td><td>2026-08-06 17:0</td></tr><tr><td>AUC_COLLAB_DUEDT</td><td></td><td>08/06/2026 5:05:11PM</td><td>Update</td><td>2026-08-06 17:45</td></tr></tbody></table> < Return to Event Overview Return to Search Refresh	Field	Name	Date/Time	Action	Value						Field	Name	Date/Time	Action	Value	AUC_COLLAB_DUEDT	Original	08/06/2026 5:05:11PM	Update	2026-08-06 17:0	AUC_COLLAB_DUEDT		08/06/2026 5:05:11PM	Update	2026-08-06 17:45
Field	Name	Date/Time	Action	Value																						
																										
Field	Name	Date/Time	Action	Value																						
AUC_COLLAB_DUEDT	Original	08/06/2026 5:05:11PM	Update	2026-08-06 17:0																						
AUC_COLLAB_DUEDT		08/06/2026 5:05:11PM	Update	2026-08-06 17:45																						

Step	Action															
15.	Click the Event Lines link to view the original amount and any changes to the quantity by Collaborators. Event Name UIFB Steel Pipe Liner 2 Event Header Invited Bidders Filter By Event Lines Constraints															
The Line Summary section displays. Line Summary < 1-2 of 2 > View All Collaboration Input Comments <table><tr><th>Field</th><th>Name</th><th>Date/Time</th><th>Action</th><th>Value</th></tr><tr><td>Qty</td><td>Original</td><td>08/06/2026 4:59:11PM</td><td>Update</td><td>60</td></tr><tr><td>Qty</td><td>V_PR_TESTUSER_2</td><td>08/06/2026 4:59:11PM</td><td>Update</td><td>100</td></tr></table>		Field	Name	Date/Time	Action	Value	Qty	Original	08/06/2026 4:59:11PM	Update	60	Qty	V_PR_TESTUSER_2	08/06/2026 4:59:11PM	Update	100
Field	Name	Date/Time	Action	Value												
Qty	Original	08/06/2026 4:59:11PM	Update	60												
Qty	V_PR_TESTUSER_2	08/06/2026 4:59:11PM	Update	100												
16.	Click the Comments and Attachments link to view any comments by Collaborators. Round 1 Format Buy Bid Factors Comments and Attachments Version 1 Type RFx															
The Event Comments and Attachments section displays. Event Comments and Attachments < 1-1 of 1 > View All Collaboration Input Comments <table><tr><th>Field</th><th>Name</th><th>Date/Time</th><th>Action</th><th>Value</th><th></th></tr><tr><td>Comments</td><td>V_PR_TESTUSER_2</td><td>08/06/2026 4:59:11PM</td><td>Add</td><td>The event is well prepared and is approved to proceed with an advertisement - TST.</td><td> </td></tr></table>		Field	Name	Date/Time	Action	Value		Comments	V_PR_TESTUSER_2	08/06/2026 4:59:11PM	Add	The event is well prepared and is approved to proceed with an advertisement - TST.				
Field	Name	Date/Time	Action	Value												
Comments	V_PR_TESTUSER_2	08/06/2026 4:59:11PM	Add	The event is well prepared and is approved to proceed with an advertisement - TST.												
17.	Once all Collaborators have completed their review, an email notification is sent to the Strategic Sourcing Buyer (i.e., event creator) indicating that collaboration has been completed by all Collaborators.															

Review Event Collaboration (Strategic Sourcing Buyer)

To review collaboration on an event, the Strategic Sourcing Buyer can click the **Review the completed collaboration** link in the email notification or click the **Event** link in the **Event Workbench**.

Step	Action
1.	Navigate to the Event Workbench page by clicking the Procurement WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation in the WorkCenter: Links > Sourcing > Event Workbench Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles.  The screenshot shows the 'Event Workbench' interface. On the left, a sidebar contains navigation links: 'My Work', 'My Approvals', 'Links', 'Contract Alerts', 'Requisitions', 'Sourcing', 'Create Event Details', 'Event Workbench' (highlighted), 'Analyze Events', 'Award Events', 'Event Document Status', 'Procurement Contracts', 'Purchase Order', 'Receipts', 'Items', and 'Other Links'. The main content area is titled 'Event Workbench' and includes a 'Search Criteria' section with fields for 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, Item ID, Event Type, Description, Event Status, Associated With Plan, and Plan Name. There are 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 and a 'Search Results' table. The table has columns for Event ID, Name, Format, Type, Unit, and Status. The results show several events, including '157299 Culpeper, L...', 'RFP Culpeper, Lync...', 'Pipe Liner Expansi...', 'UIFB Steel Pipe Li...', 'Job Aid Testing', 'Steel Pipe Test Ev...', 'UIFB Steel Pipe LI...', and 'UIFB Steel Pipe LI...'. The status of these events varies, with some being 'Open' and others 'Event Completed'.
	Users can also access the Event Workbench page using the following navigation path: NavBar > Menu > Sourcing > Maintain Events > Event Workbench



Procurement Job Aid

PR345 Strategic Sourcing Collaboration (VDOT Only)

Step	Action
------	--------

The **Event Workbench** page displays.

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 Plan Name
[Default Search Preferences](#)
Legend
Search Results | < > 1-25 of 2840 > > | View 100

Event ID	Name	Format	Type	Unit	Status			
▶ 0000157299	157299 Culpeper, L...	Buy	RFx	50100	Open	×	📄	🔍
▶ 0000157298	RFP Culpeper, Lync...	Buy	RFx	50100	Open	×	📄	
▶ 0000160478	Pipe Liner Expansi...	Buy	RFx	50100	Open	×	📄	
▶ 0000160479	UIFB Steel Pipe Li...	Buy	RFx	50100	Collaborating Event	×	📄	👤👤👤
▶ 0000160477	Job Aid Testing	Buy	RFx	50100	08/10/2026 09:32 EDT	×	📄	📄🔍
▶ 0000160474	Steel Pipe Test Ev...	Buy	RFx	50100	Open	×	📄	

3. Click the **Event ID** link for the applicable Event.

Event ID	Name	Format	Type	Unit	Status
▶ 0000157299	157299 Culpeper, L...	Buy	RFx	50100	Open
▶ 0000157298	RFP Culpeper, Lync...	Buy	RFx	50100	Open
▶ 0000160478	Pipe Liner Expansi...	Buy	RFx	50100	Open
▶ 0000160479	UIFB Steel Pipe Li...	Buy	RFx	50100	Collaborating Event



Procurement Job Aid

PR345 Strategic Sourcing Collaboration (VDOT Only)

Step	Action
	The Modify an Event Event Summary page displays. Modify an Event Event Summary Business Unit: 50100Event ID: 0000160479Round: 1Version: 1Event Format: Buy Event Type: RFXEvent Status: Collaborating EventSolicitation Type: IFB UnsealedBid Category Code: Supplies - Non-Technology *Event Name: UIFB Steel Pipe Liner 2 *Description: UIFB160383 Steel Pipe Liner - Shipman Area Headquarters Time Zone: EDTPreview Date: 08/07/2026Time: 10:00Start Date: 08/13/2026Time: 13:00End Date: 08/14/2026Time: 13:00 Copy From: [Dropdown]Go eVA Interfaced: NSEV eVA Dtm: By Line [Dropdown]Preview By: [Dropdown] 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 Event Reminder Notification 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 View Collaboration 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 Related Links: Document Status Inquiry View All Attachments for Event Plan Task Associations Collaboration Status: Available Last Updated By: V_PA_TESTUSER_1 Return to SearchRefreshAddUpdate/Display



Procurement Job Aid

PR345 Strategic Sourcing Collaboration (VDOT Only)

Step	Action
4.	Click the View Collaboration link under Step 4: Invite Collaborators to see any collaboration changes and comments. Step 4: Invite Collaborators Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it. Event Collaborators View Collaboration

The **Review Event Collaboration** page displays.

Review Event Collaboration

Business Unit 50100

Event ID 0000160479

Round 1

Version 1

Event Name UIFB Steel Pipe Liner 2

Format Buy

Type RFX

Event Header

Event Lines

Invited Bidders

Constraints

Bid Factors

Comments and Attachments

Filter By

Event Parameters

Collaboration Input

Comments

Field	Name	Date/Time	Action	Value	Update	*Update Action
					☐	

Event Summary

Collaboration Input

Comments

Field	Name	Date/Time	Action	Value	Update	*Update Action
AUC_COLLAB_DUEDT	Original	08/06/2026 17:05:11	Update	2026-08-06 17:0	☐	Accept
AUC_COLLAB_DUEDT		08/06/2026 17:05:11	Update	2026-08-06 17:45	☐	Reject

Update Event

< Return to Event Overview

Return to Search

Refresh

Add

Update/Display

5.	Click the Event Lines link to view the line edits entered by each Collaborator. Business Unit 50100 Event ID 0000160479 Event Name UIFB Steel Pipe Liner 2 Event Header Invited Bidders Event Lines Constraints Filter By
----	--

Step	Action
------	--------

The **Event Lines** section displays on the page.

Event Line

Line Nbr 1

Item ID 6588012000

Description PIPE, STEEL PIPE, STEEL

Line Summary

Collaboration Input

Comments

Field	Name	Date/Time	Action	Value	Update	*Update Action
Qty	Original	08/06/2026 16:59:11	Update	60	☐	Accept
Qty	V_PR_TESTUSER_2	08/06/2026 16:59:11	Update	100	☐	Reject
Qty	V_PA_TESTUSER_1	08/06/2026 17:31:06	Update	75	☐	Reject

Line Details

Collaboration Input

Comments

Field	Name	Date/Time	Action	Value	Update	*Update Action
					☐	



Use the **Event Line navigation controls** to scroll through the lines if there are multiple lines in the Event.

Event Line

Q

I

<

>

1 of 1

>

>

View All

6. Select the **Update** checkbox option in the **Line Summary** section.

Line Summary

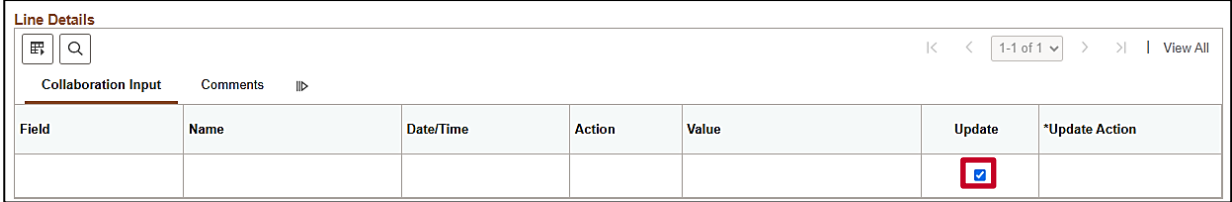
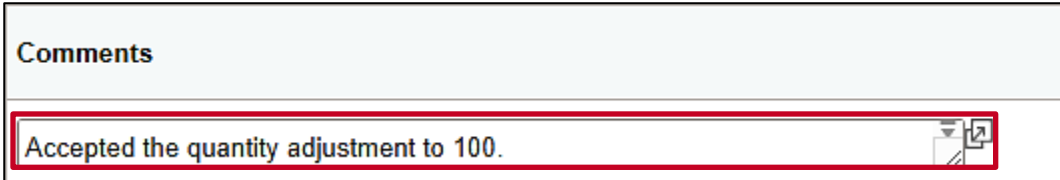
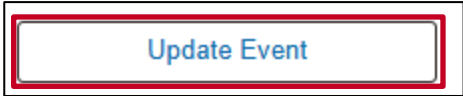
Collaboration Input

Comments

Field	Name	Date/Time	Action	Value	Update	*Update Action
Qty	Original	08/06/2026 16:59:11	Update	60	☐	Accept
Qty	V_PR_TESTUSER_2	08/06/2026 16:59:11	Update	100	☒	Reject
Qty	V_PA_TESTUSER_1	08/06/2026 17:31:06	Update	75	☐	Reject

7. Click the **Update Action** dropdown button and select “Accept” or “Reject” in the **Line Summary** section.

Value	Update	*Update Action
60	☐	Accept
100	☒	Accept

Step	Action
8.	Select the Update checkbox option in the Line Details section.  The screenshot shows the 'Line Details' section with a table. The table has columns: Field, Name, Date/Time, Action, Value, Update, and *Update Action. The 'Update' column has a checkbox that is checked and highlighted with a red box.
9.	Click the Comments tab.  The screenshot shows two tabs: 'Collaboration Input' and 'Comments'. The 'Comments' tab is highlighted with a red box. The Comments tab displays.  The screenshot shows the 'Comments' tab with a text input field and a submit button.
10.	Enter comments in the Comments field as applicable.  The screenshot shows the 'Comments' field with the text 'Accepted the quantity adjustment to 100.' entered. The text is highlighted with a red box.
11.	Repeat Steps 6-10 for each Event Line.
12.	Once all collaboration has been either accepted or rejected, and comments added, click the Update Event button.  The screenshot shows the 'Update Event' button, which is highlighted with a red box.



Procurement Job Aid

PR345 Strategic Sourcing Collaboration (VDOT Only)

Step	Action
------	--------

The **Modify an Event Event Summary** page displays.

Modify an Event

Event Summary

Business Unit 50100Event ID 0000160479Round 1Version 1Event Format Buy

Event Type RFX

Event Status Collaborating Event

Solicitation Type IFB Unsealed

Bid Category Code Supplies - Non-Technology

*Event Name UIFB Steel Pipe Liner 2

*Description UIFB160383 Steel Pipe Liner - Shipman Area Headquarters

Time Zone EDT

Preview Date 08/07/2026Time 10:00

Start Date 08/13/2026Time 13:00

End Date 08/14/2026Time 13:00

Copy From

eVA Interfaced NSEV eVA Dtim

Preview By: By Line

Go

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

Event Reminder Notification

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

View Collaboration

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

Related Links:

Document Status Inquiry

View All Attachments for Event

Plan Task Associations

Collaboration Update process has completed.

The event has been updated according to the chosen collaboration input. Please review event to ensure updates are acceptable.

Return to Search

Refresh

Add

Update/Display

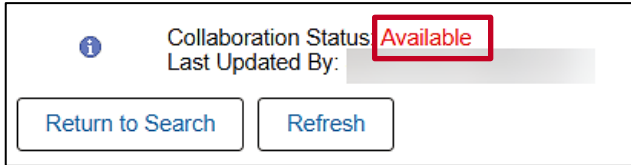
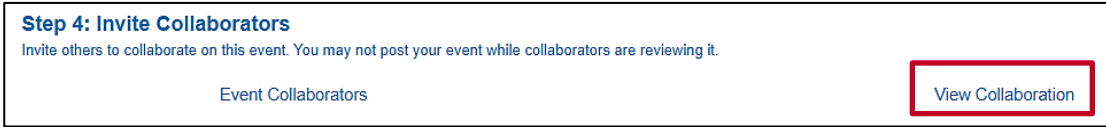
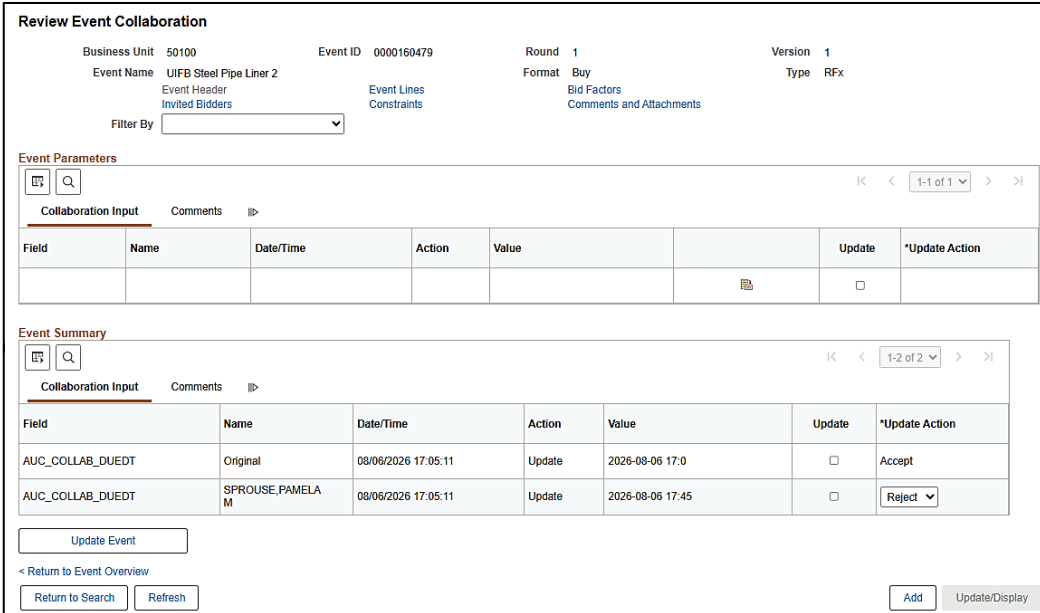
The Event is saved and the status changes to “Collaboration Update process has completed”.

Collaboration Update process has completed.

The event has been updated according to the chosen collaboration input. Please review event to ensure updates are acceptable.

Return to Search

Refresh

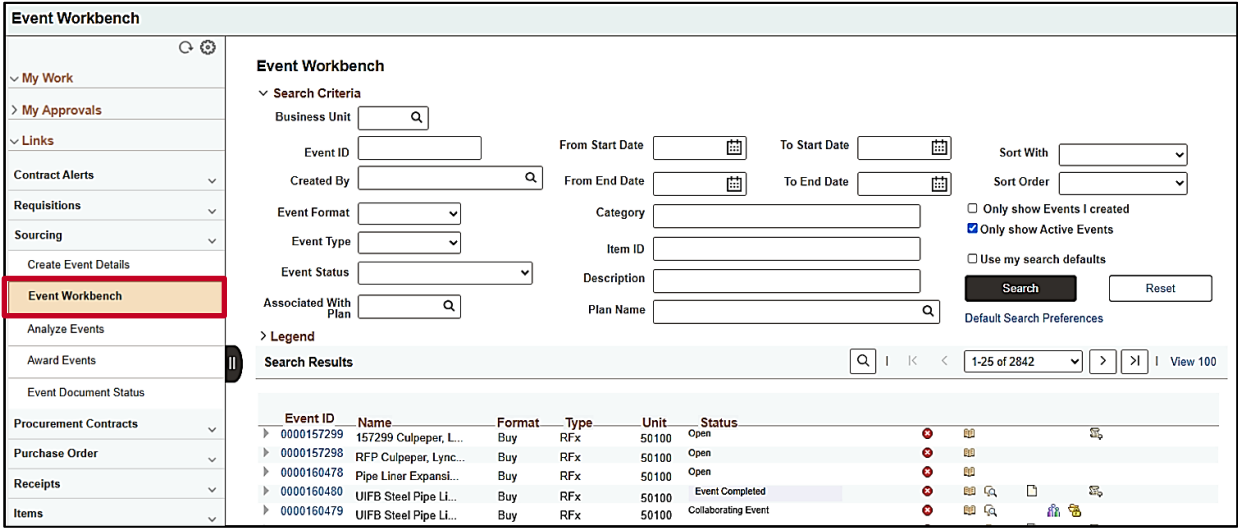
Step	Action
13.	Click the Save Event button. 
	The Collaboration Status updates to “Available”. 
14.	To review the changes made to the event, click the View Collaboration link under Step 4: Invite Collaborators. 
	The Review Event Collaboration page displays. 
15.	Click the links at the top of the page (e.g., Event Header, Event Lines, Bid Factors, or Comments and Attachments) to review the specific changes. 

Step	Action																												
	The collaboration actions display with the action taken in the Update Action field. Line Summary Collaboration Input Comments <table><thead><tr><th>Field</th><th>Name</th><th>Date/Time</th><th>Action</th><th>Value</th><th>Update</th><th>*Update Action</th></tr></thead><tbody><tr><td>Qty</td><td>Original</td><td>08/06/2026 16:59:11</td><td>Update</td><td>60</td><td>☐</td><td>Accept</td></tr><tr><td>Qty</td><td>V_PR_TESTUSER_2</td><td>08/06/2026 16:59:11</td><td>Update</td><td>100</td><td>☐</td><td>Accept</td></tr><tr><td>Qty</td><td>V_PA_TESTUSER_1</td><td>08/06/2026 17:31:06</td><td>Update</td><td>75</td><td>☐</td><td>Reject</td></tr></tbody></table>	Field	Name	Date/Time	Action	Value	Update	*Update Action	Qty	Original	08/06/2026 16:59:11	Update	60	☐	Accept	Qty	V_PR_TESTUSER_2	08/06/2026 16:59:11	Update	100	☐	Accept	Qty	V_PA_TESTUSER_1	08/06/2026 17:31:06	Update	75	☐	Reject
Field	Name	Date/Time	Action	Value	Update	*Update Action																							
Qty	Original	08/06/2026 16:59:11	Update	60	☐	Accept																							
Qty	V_PR_TESTUSER_2	08/06/2026 16:59:11	Update	100	☐	Accept																							
Qty	V_PA_TESTUSER_1	08/06/2026 17:31:06	Update	75	☐	Reject																							
16.	The event can be posted for advertisement following the normal Strategic Sourcing process.																												

Bid Analysis Collaboration

Invite Collaborators for Bid Analysis (Strategic Sourcing Buyer)

Once an event's End Date has passed and all the bids have been uploaded from eVA, the **Analyze Event** pages become available. The Strategic Sourcing Buyer analyzes the responses and may invite Collaborators for approvals or comments, prior to making the award using the Invite Collaborators page. The Strategic Sourcing Buyer may invite Collaborators, such as Customers (users) for comments, a manager for approval, or RFP Evaluation Committee members for scoring.

Step	Action
1.	Navigate to the Event Workbench page by clicking the Procurement WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation in the WorkCenter: Links > Sourcing > Event Workbench Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Event Workbench page using the following navigation path: NavBar > Menu > Sourcing > Maintain Events > Event Workbench

Step	Action
------	--------

The **Event Workbench** page displays.

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 Plan Name

[Default Search Preferences](#)

> **Legend**

Search Results | < > 1-25 of 2842 > > | [View 100](#)

Event ID	Name	Format	Type	Unit	Status				
0000157299	157299 Culpeper, L...	Buy	RFx	50100	Open	✖	📅	🔍	📄
0000157298	RFP Culpeper, Lync...	Buy	RFx	50100	Open	✖	📅	🔍	📄
0000160478	Pipe Liner Expansl...	Buy	RFx	50100	Open	✖	📅	🔍	📄
0000160480	UIFB Steel Pipe Li...	Buy	RFx	50100	Event Completed	✖	📅	🔍	📄
0000160479	UIFB Steel Pipe Li...	Buy	RFx	50100	Collaborating Event	✖	📅	🔍	📄
0000160477	Job Aid Testing	Buy	RFx	50100	Event Completed	✖	📅	🔍	📄
0000160474					Open	✖	📅	🔍	📄

3. Enter the Event ID number in the **Event ID** field.

Event ID

4. Click the **Search** button.

☐ Use my search defaults

[Default Search Preferences](#)

The search results display.

Search Results | < > 1-1 of 1 > > | [View All](#)

Event ID	Name	Format	Type	Unit	Status				
0000160480	UIFB Steel Pipe Li...	Buy	RFx	50100	Event Completed	✖	📅	🔍	📄

5. Click the **Analyze Bids** icon for the applicable Event. The Analyze Bids option will not be available if the event **Status** is "Open".

✖ 📅 🔍 📄 📄



Procurement Job Aid

PR345 Strategic Sourcing Collaboration (VDOT Only)

Step	Action
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The **Analyze Total** page displays.

Analyze Total

Analyze Total

Analyze Line

Business Unit:	Event ID:	Round:	Version:	Event Name:	
50100	0000160480	1	2	UIFB Steel Pipe Liner	
Event Format:	Event Type:	Currency:	End Date:	Status:	Go To:
Buy	RFx	USD	08/17/2026 09:40 EDT	Posted	...

> **Bid Analysis and Display Options** ⓘ

Analysis

	Bidder Name	Pearson Construction Inc	Swipe Resources LLC
Event Version Responded To	1		1
Bid Number	1		1
Total Bid Amount	379.20		453.00
Total Bid Cost	0.00		0.00
Total Event Score	100.00		99.67
Total Header Cost	0.00		0.00
Total Header Score	0.00		0.00

Bid Action

NA

NA

Reject Reason

Award by Percent

Hide Bid

☐

☐

Recalculate

Add / Edit Factors

Unhide Bids

<<

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>

>>

Save

Return to Search

6. Click the **Go To** dropdown button and select "Invite Collaborators".

Go To:

Invite Collaborators



Procurement Job Aid

PR345 Strategic Sourcing Collaboration (VDOT Only)

Step	Action
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The **Event Collaboration Details** page displays.

Event Collaboration Details

Bid Analysis Review Sections

Collaboration Due Date
Process Type ☐ Show Bidders Name

Review By Notifications

☒ Never ☐ One day before ☐ One week before ☐ Weekly before deadline ☐ Daily starting one week before

Review Sections

Seq Nbr Section Name
Process Type Section Review By Date Time

Collaborators

Seq Nbr	UserId	Name	Review By Date	Time	Delegate User ID	Name	Override Main Collaborator	Reviewed		
1							☐	☐	+	-

Find Collaborators

Add Section

Route To

OK Cancel



Collaborators may have previously reviewed and scored bid responses outside of Cardinal. Each Collaborator enters their scores into Cardinal for calculation.

7.

In the **Collaboration Due Date** and **Time** fields, enter a deadline date and time for all collaboration to end.

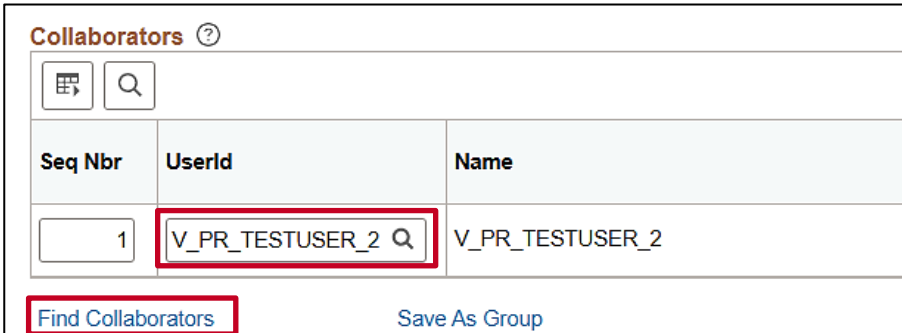
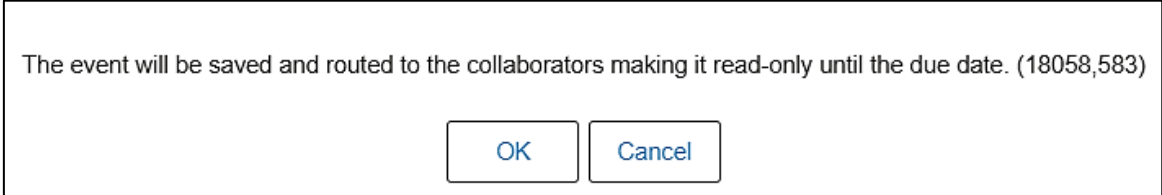
Collaboration Due Date

Time

8.

Clear all existing names in the Collaborators **UserId** field.

UserId

Step	Action
9.	In the Collaborators section, enter the User ID of the user to collaborate on the Event. Click the UserId Lookup button to find a user or click the Find Collaborators link to look up a previously set up Collaborator Group. 
	Click the Add a new row (+) icon at the end of the row to add another Collaborator. Use the Delete row (-) icon to remove a Collaborator. 
	The routing sequence number is automatically populated in the Seq Nbr field as Collaborators are added. The sequence may be modified to ensure the event is reviewed by the Collaborators in the desired order. 
10.	Once all the collaborators have been entered, click the Route To button. 
A routing confirmation message displays in a pop-up window, noting that the event will be read-only until the collaboration due date. 	



Procurement Job Aid

PR345 Strategic Sourcing Collaboration (VDOT Only)

Step	Action
11.	Click the OK button. 

A message displays in a pop-up window warning the user about the status change.

Warning -- Clicking on Save will change the status to Collaborating Bid Analysis. Do you want to continue? (18058,10057)

OK

Cancel

12.	Click the OK button. 
-----	--

The **Analyze Total** page displays.

Analyze Total

Analyze Total

Analyze Line

Business Unit:	Event ID:	Round:	Version:	Event Name:
50100	0000160480	1	2	UIFB Steel Pipe Liner
Event Format:	Event Type:	Currency:	End Date:	Status:
Buy	RFx	USD	08/17/2026 09:40 EDT	Collaborating Bid Analysis
				Go To:

> Bid Analysis and Display Options ?

Analysis

	Bidder Name	Pearson Construction Inc	Swipe Resources LLC
Event Version Responded To	1	1	
Bid Number	1	1	
Total Bid Amount	379.20	453.00	
Total Bid Cost	0.00	0.00	
Total Event Score	100.00	99.67	
Total Header Cost	0.00	0.00	
Total Header Score	0.00	0.00	

Bid Action

NA

NA

Reject Reason

Award by Percent

Hide Bid

☐

☐

Recalculate

Add / Edit Factors

Unhide Bids

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Save

Return to Search

Step	Action
i	The Event is read only for non-collaborators until the due date. The Event's Status is changed to "Collaborating Bid Analysis". Status: Collaborating Bid Analysis An email notification is sent to each Collaborator. Event Analysis Collaboration You have been appointed by [redacted] to collaborate on the analysis of event 50100 - 0000160445 Round 1 Version 1. The due date for your collaboration is 08/07/2026 17:00. Click on the following link to analyze this sourcing event and enter your collaboration input. URL Click here to review Bid Analysis Collaboration
i	Collaborators may score the event at any time, prior to the due date.

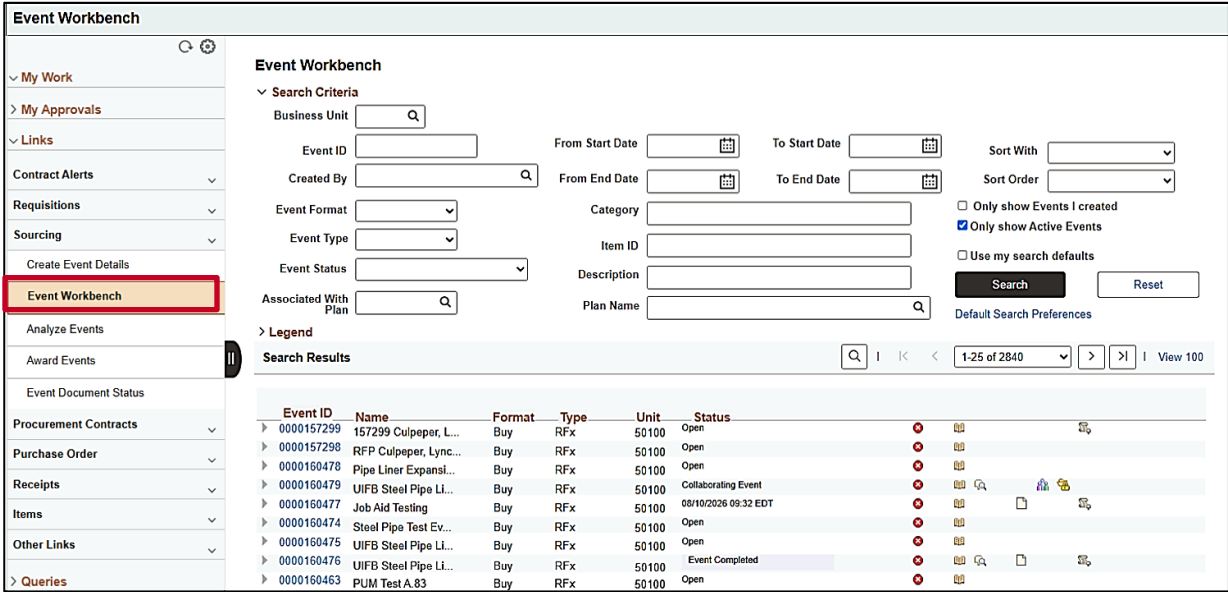
Collaborate on Bid Analysis

An email notification is sent to each Collaborator and an item is added to each Collaborator's **Event Workbench**.

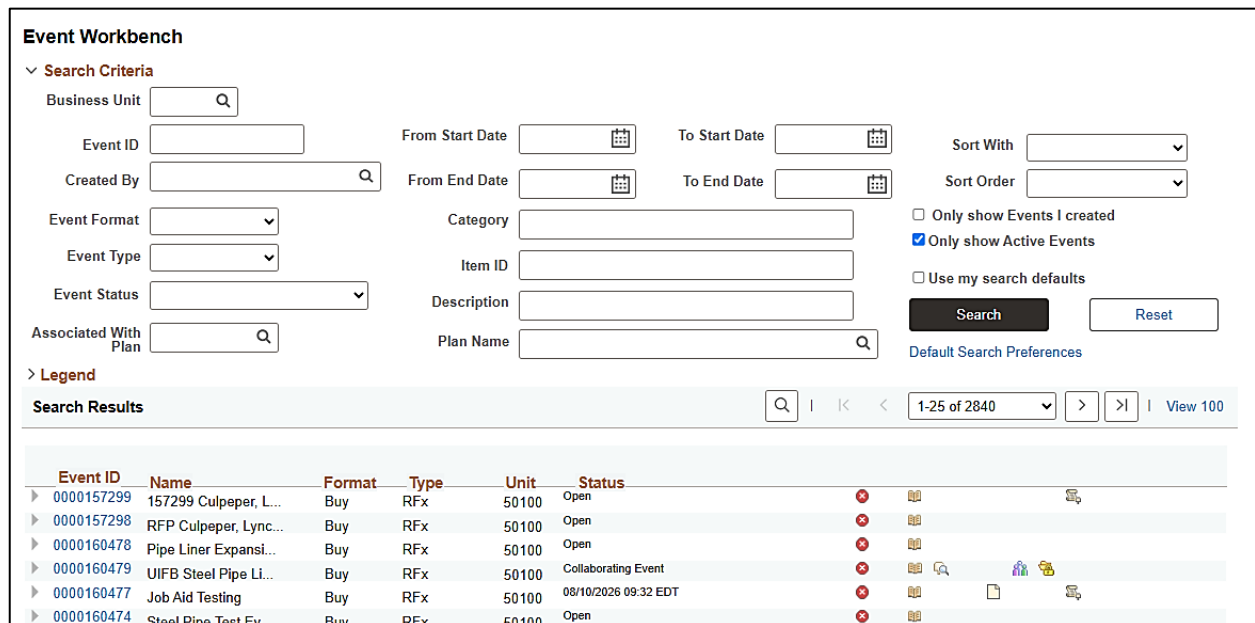
As an Event Collaborator, access the Event using one of the following options:

- Click the **Collaborate on this event** link in the email notification
- Click the **Event ID** link in the **Event Workbench**.

Step	Action
1.	Navigate to the Event Workbench page by clicking the Procurement WorkCenter tile. Procurement WorkCenter 
i	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.

Step	Action
2.	Use the following navigation in the WorkCenter: Links > Sourcing > Event Workbench Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles.  The screenshot shows the 'Event Workbench' interface. On the left is a navigation menu with options like 'My Work', 'My Approvals', 'Links', 'Contract Alerts', 'Requisitions', 'Sourcing', 'Create Event Details', 'Event Workbench' (highlighted), 'Analyze Events', 'Award Events', 'Event Document Status', 'Procurement Contracts', 'Purchase Order', 'Receipts', 'Items', 'Other Links', and 'Queries'. The main area is titled 'Event Workbench' and contains 'Search Criteria' fields for Business Unit, Event ID, Created By, Event Format, Event Type, Event Status, Associated With Plan, From Start Date, From End Date, To Start Date, To End Date, Sort With, Sort Order, and checkboxes for 'Only show Events I created', 'Only show Active Events', and 'Use my search defaults'. There are 'Search' and 'Reset' buttons. Below the search criteria is a 'Legend' section and a 'Search Results' table with columns: Event ID, Name, Format, Type, Unit, Status. The table lists several events, including '157299 Culpeper, L...', 'RFP Culpeper, Lync...', 'Pipe Liner Expansi...', 'UIFB Steel Pipe Li...', 'Job Aid Testing', 'Steel Pipe Test Ev...', and 'PUM Test A.83'. The status of these events varies, including 'Open', 'Collaborating Event', and 'Event Completed'.
	Users can also access the Event Workbench page using the following navigation path: NavBar > Menu > Sourcing > Maintain Events > Event Workbench

The **Event Workbench** page displays.

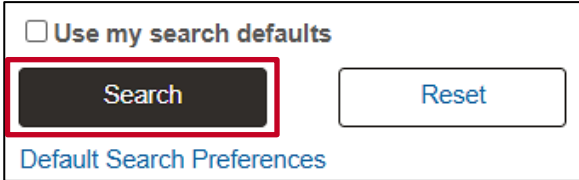


The screenshot shows the 'Event Workbench' interface. On the left is a navigation menu with options like 'My Work', 'My Approvals', 'Links', 'Contract Alerts', 'Requisitions', 'Sourcing', 'Create Event Details', 'Event Workbench' (highlighted), 'Analyze Events', 'Award Events', 'Event Document Status', 'Procurement Contracts', 'Purchase Order', 'Receipts', 'Items', 'Other Links', and 'Queries'. The main area is titled 'Event Workbench' and contains 'Search Criteria' fields for Business Unit, Event ID, Created By, Event Format, Event Type, Event Status, Associated With Plan, From Start Date, From End Date, To Start Date, To End Date, Sort With, Sort Order, and checkboxes for 'Only show Events I created', 'Only show Active Events', and 'Use my search defaults'. There are 'Search' and 'Reset' buttons. Below the search criteria is a 'Legend' section and a 'Search Results' table with columns: Event ID, Name, Format, Type, Unit, Status. The table lists several events, including '157299 Culpeper, L...', 'RFP Culpeper, Lync...', 'Pipe Liner Expansi...', 'UIFB Steel Pipe Li...', 'Job Aid Testing', 'Steel Pipe Test Ev...', and 'PUM Test A.83'. The status of these events varies, including 'Open', 'Collaborating Event', and 'Event Completed'.



Procurement Job Aid

PR345 Strategic Sourcing Collaboration (VDOT Only)

Step	Action
3.	Enter the Event ID number in the Event ID field. 
4.	Click the Search button. 

The search results display.

Search Results						  < > 1-1 of 1 > View All	
Event ID	Name	Format	Type	Unit	Status		
0000160480	UIFB Steel Pipe Li...	Buy	RFx	50100	Collaborating Bid Analysis	    	

5.	Click the Available for checkout icon next to the applicable Event. 
----	---

The **Analyze Total** page displays.

Analyze Total

Analyze Total

Analyze Line

Business Unit:	Event ID:	Round:	Version:	Event Name:
50100	0000160480	1	2	UIFB Steel Pipe Liner
Event Format:	Event Type:	Currency:	End Date:	Status:
Buy	RFx	USD	08/17/2026 9:40AM EDT	Collaborating Bid Analysis
				Go To: ...

> Bid Analysis and Display Options ⓘ

Analysis

Event Version Responded To	1	1
Bid Number	1	1
Total Bid Cost	0.00	0.00
Total Event Score	100.00	99.67
Total Header Cost	0.00	0.00
Total Header Score	0.00	0.00

Bid Action

NA

NA

Reject Reason

Award by Percent

Hide Bid

☐

☐

Recalculate

Analysis Complete

Unhide Bids

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>>

Save

Return to Search



Procurement Job Aid

PR345 Strategic Sourcing Collaboration (VDOT Only)

Step	Action																		
6.	Review the bid factors if applicable. Analysis <table><tr><td>Event Version Responded To</td><td>1</td><td>1</td></tr><tr><td>Bid Number</td><td>1</td><td>1</td></tr><tr><td>Total Bid Cost</td><td>0.00</td><td>0.00</td></tr><tr><td>Total Event Score</td><td>100.00</td><td>99.67</td></tr><tr><td>Total Header Cost</td><td>0.00</td><td>0.00</td></tr><tr><td>Total Header Score</td><td>0.00</td><td>0.00</td></tr></table>	Event Version Responded To	1	1	Bid Number	1	1	Total Bid Cost	0.00	0.00	Total Event Score	100.00	99.67	Total Header Cost	0.00	0.00	Total Header Score	0.00	0.00
Event Version Responded To	1	1																	
Bid Number	1	1																	
Total Bid Cost	0.00	0.00																	
Total Event Score	100.00	99.67																	
Total Header Cost	0.00	0.00																	
Total Header Score	0.00	0.00																	
7.	Click the Analyze Line link in the top left part of the page. Analyze Line																		

The **Analyze Line** page displays.

Analyze Line

Analyze Total

Business Unit: 50100

Event Format: Buy

Analyze Line

Event ID: 0000160480

Event Type: RFx

Round: 1

Currency: USD

Version: 2

End Date: 08/17/2026 9:40AM EDT

Event Name: UIFB Steel Pipe Liner

Status: Collaborating Bid Analysis

Go To:

...

Line Items

1-1 of 1

View All

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	6588012000	PIPE, STEEL PIPE, STEEL	6588012	LF	375.00000	60	0	100	Open	Analyze

Save

Return to Search

8.	To analyze responses by line, click the Analyze link on each line in the Line Items section. <table><tr><td>Line Status</td><td>Analyze</td></tr><tr><td>Open</td><td>Analyze</td></tr></table>	Line Status	Analyze	Open	Analyze
Line Status	Analyze				
Open	Analyze				



Procurement Job Aid

PR345 Strategic Sourcing Collaboration (VDOT Only)

Step	Action
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A different **Analyze Line** page displays.

Analyze Line

Business Unit: 50100

Event ID: 0000160480

Round: 1

Version: 2

Event Name: UIFB Steel Pipe Liner

Status: Collaborating Bid Analysis

Event Format: Buy

Event Type: RFX

Currency: USD

End Date: 08/17/2026 9:40AM EDT

Line: 1

Requested Quantity: 60

UOM: LF

Start Price: 375.00000

Weighting: 100

Previous Line

Next Line

Item ID: 6588012000

Item Description: PIPE, STEEL PIPE, STEEL

> Bid Analysis and Display Options

Analysis

Event Version: 1

Bid Number: 1

Bid Quantity: 60.0000

Minimum Bid Quantity: 0.0000

Total Bid Cost: 0.00

Total Line Score: 100.0000

Event Version: 1

Bid Number: 1

Bid Quantity: 60.0000

Minimum Bid Quantity: 0.0000

Total Bid Cost: 0.00

Total Line Score: 99.6700

Bid Action:

Reject Reason Code:

Award by Percent:

Award Quantity:

Hide Bid: ☐

> Factors

Recalculate

Unhide Bids

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Go To Line

OK

Cancel

Apply

9. Click the **Expand Section Factors** button (>).



The **Factors** section displays.

Factors

Weighting

UOM

Ideal

What is your bid price?

100.00000

0

6.32

7.55



Procurement Job Aid

PR345 Strategic Sourcing Collaboration (VDOT Only)

Step	Action
10.	Review the line bid price information under Factors. 6.32 7.55
11.	Click the OK button. OK Cancel Apply

The original **Analyze Line** page displays.

Analyze Line

Analyze Total

Business Unit:
50100

Event Format:
Buy

Analyze Line

Event ID:
0000160480

Event Type:
RFx

Round:
1

Currency:
USD

Version:
2

End Date:
08/17/2026 9:40AM EDT

Event Name:
UIFB Steel Pipe Liner

Status:
Collaborating Bid Analysis

Go To:

...

Line Items

1-1 of 1

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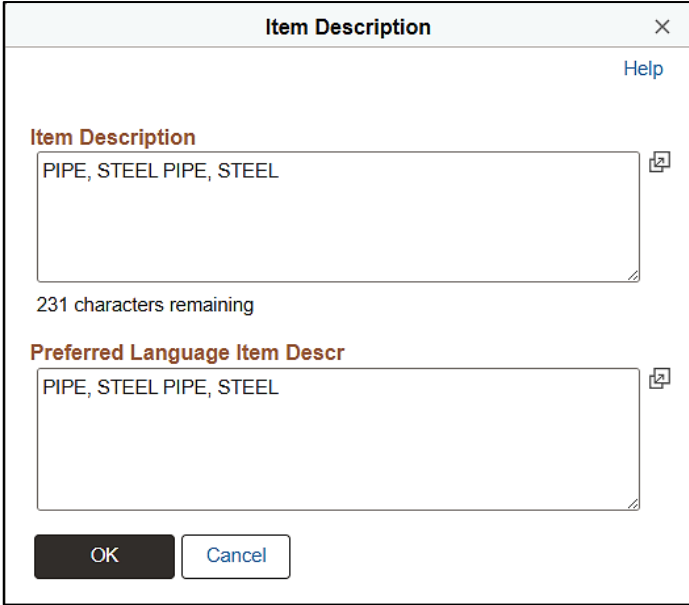
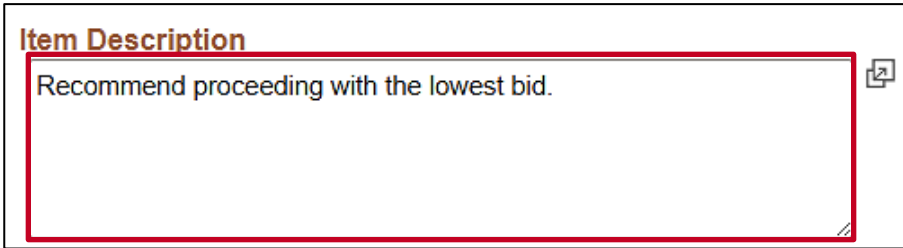
View All

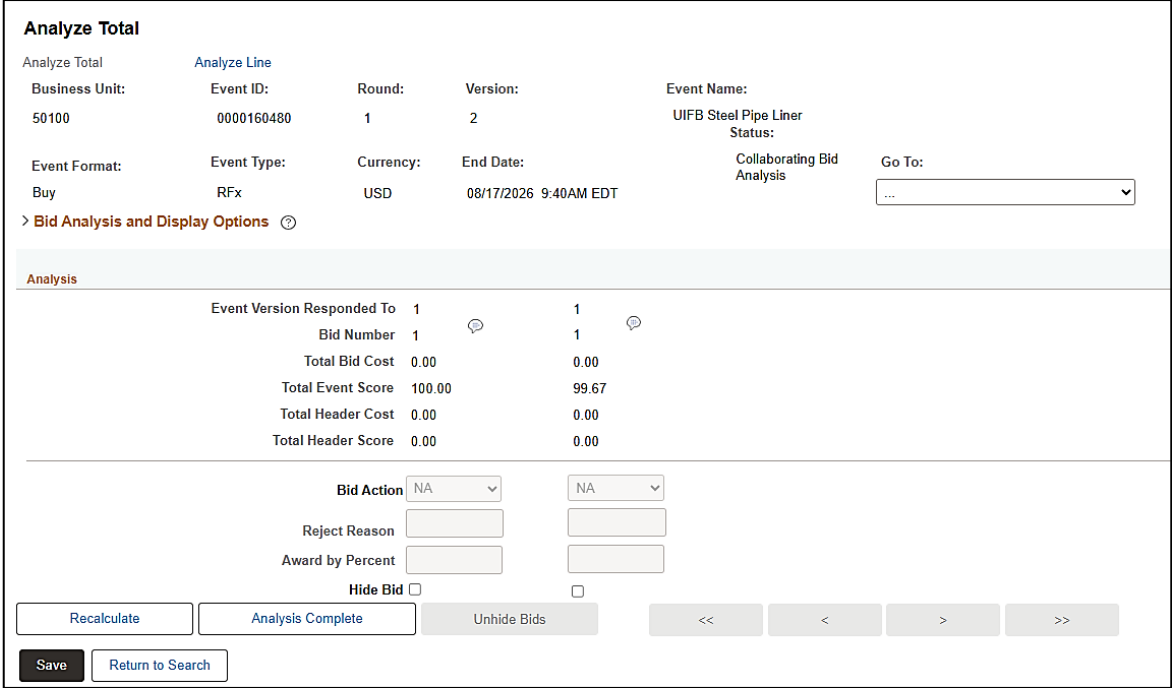
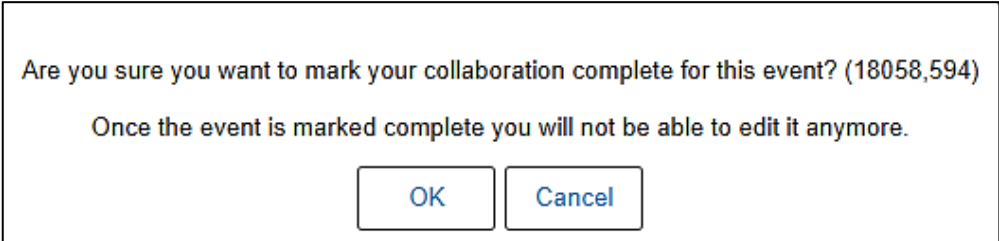
Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze	
1	6588012000	PIPE, STEEL PIPE, STEEL		6588012	LF	375.00000	60	0	100	Open	Analyze

Save

Return to Search

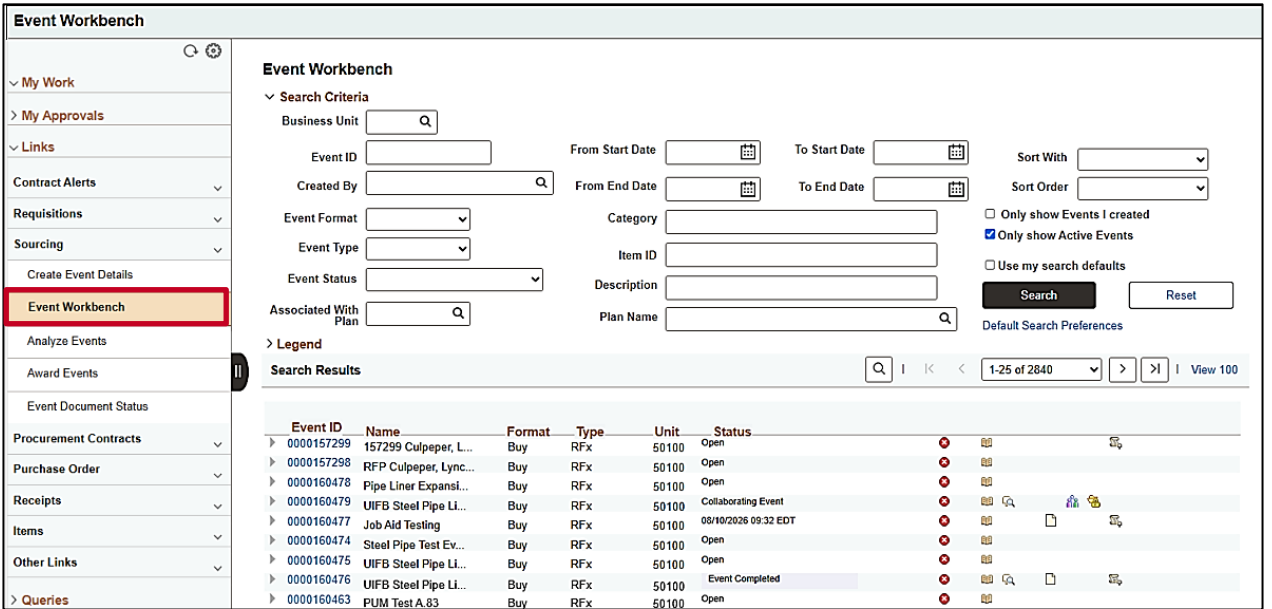
| 12. | To enter comments on a bid response item, click the **Item Description** icon. | Line | Item ID | Description | | |------|------------|-------------------------|--| | 1 | 6588012000 | PIPE, STEEL PIPE, STEEL | | |

Step	Action
	The Item Description page displays in a pop-up window. 
13.	Enter a comment in the Item Description field. 
14.	Click the OK button. 
	Comments entered on the Item Description are carried over to Events that are copied from this Event. Therefore, the user should not use the copy functionality on Events with comments added using Item Description.
15.	Click the Analyze Total link. 

Step	Action
	The Analyze Total page displays. 
16.	After reviewing all event responses and comments, click the Analysis Complete button. 
	A confirmation message displays. 
17.	Click the OK button to confirm that no further edits are needed and to complete collaboration. 
	An email notification is sent to the Strategic Sourcing Buyer indicating that collaboration has been completed by all Collaborators.

Review Bid Analysis Collaboration (Strategic Sourcing Buyer)

To review Collaborator input on the bid responses, the Strategic Sourcing Buyer can click the **Review the completed collaboration** link in the email notification or click the **Event** link in the **Event Workbench**.

Step	Action
1.	Navigate to the Event Workbench page by clicking the Procurement WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation in the WorkCenter: Links > Sourcing > Event Workbench Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles.  The screenshot shows the 'Event Workbench' interface. On the left is a navigation menu with options like 'My Work', 'My Approvals', 'Links', 'Contract Alerts', 'Requisitions', 'Sourcing', 'Create Event Details', 'Event Workbench' (highlighted), 'Analyze Events', 'Award Events', 'Event Document Status', 'Procurement Contracts', 'Purchase Order', 'Receipts', 'Items', 'Other Links', and 'Queries'. The main area contains search criteria (Business Unit, Event ID, Created By, Event Format, Event Type, Event Status, Associated With Plan) and filters (From Start Date, To Start Date, Sort With, From End Date, To End Date, Sort Order, Category, Item ID, Description, Plan Name). There are checkboxes for 'Only show Events I created', 'Only show Active Events', and 'Use my search defaults'. A 'Search' button and a 'Reset' button are present. Below the search area is a 'Search Results' section with a table of events. The table has columns: Event ID, Name, Format, Type, Unit, Status. The results show several events, including '157299 Culpeper, L...', 'RFP Culpeper, Lync...', 'Pipe Liner Expansi...', 'UIFB Steel Pipe Li...', 'Job Aid Testing', 'Steel Pipe Test Ev...', 'UIFB Steel Pipe Li...', 'UIFB Steel Pipe Li...', and 'PUM Test A.83'.
	Users can also access the Event Workbench page using the following navigation path: NavBar > Menu > Sourcing > Maintain Events > Event Workbench

Step	Action
------	--------

The **Event Workbench** page displays.

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
Plan Name

[Default Search Preferences](#)

Legend

Search Results

Event ID	Name	Format	Type	Unit	Status			
0000157299	157299 Culpeper, L...	Buy	RFx	50100	Open			
0000157298	RFP Culpeper, Lync...	Buy	RFx	50100	Open			
0000160478	Pipe Liner Expansi...	Buy	RFx	50100	Open			
0000160479	UIFB Steel Pipe Li...	Buy	RFx	50100	Collaborating Event			
0000160477	Job Aid Testing	Buy	RFx	50100	08/10/2026 09:32 EDT			
0000160474	Steel Pipe Test Ev...	Buy	RFx	50100	Open			

- Enter the Event ID number in the **Event ID** field.

Event ID

- Click the **Search** button.

☐ Use my search defaults

[Default Search Preferences](#)

The search results display.

Event ID	Name	Format	Type	Unit	Status			
0000160480	UIFB Steel Pipe Li...	Buy	RFx	50100	Collaborating Bid Analysis			

- Click the **Analyze Bids** icon.

Step	Action
------	--------

The **Analyze Total** page displays for the selected event.

Analyze Total

Analyze Line

Business Unit: 50100

Event ID: 0000160480

Round: 1

Version: 2

Event Name: UIFB Steel Pipe Liner

Status: Pending Award

Go To:

...

Event Format: Buy

Event Type: RFx

Currency: USD

End Date: 08/17/2026 09:40 EDT

> Bid Analysis and Display Options

Analysis

Review Type

Bidder Name

Pearson Construction Inc

Swipe Resources LLC

Event Version Responded To

1

1

Bid Number

1

1

Total Bid Amount

379.20

453.00

Total Bid Cost

0.00

0.00

Total Event Score

100.00

99.67

Total Header Cost

0.00

0.00

Total Header Score

0.0000

0.0000

Bid Action

NA

NA

Reject Reason

Award by Percent

Hide Bid

Recalculate

Add / Edit Factors

Unhide Bids

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Save

Return to Search

6. Click the **Analyze Line** link.

Analyze Total **Analyze Line**

The **Analyze Line** page displays.

Analyze Line

Analyze Total

Business Unit:

50100

Event Format:

Buy

Analyze Line

Event ID:

0000160480

Event Type:

RFx

Round:

1

Version:

2

Currency:

USD

End Date:

08/17/2026 09:40 EDT

Event Name:

UIFB Steel Pipe Liner

Status:

Pending Award

Go To:

...

Line Items

Grid Icon

Search Icon

1-1 of 1

>

>>

View All

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	6588012000	Recommend proceeding with the lowest bid.	6588012	LF	375.00000	60	0	100	Open	Analyze

Save

Return to Search



Procurement Job Aid

PR345 Strategic Sourcing Collaboration (VDOT Only)

Step	Action						
7.	Review the Collaborator comments which appear in the Description field of each line. <table><tr><th>Line</th><th>Item ID</th><th>Description</th></tr><tr><td>1</td><td>6588012000</td><td>Recommend proceeding with the lowest bid.</td></tr></table>	Line	Item ID	Description	1	6588012000	Recommend proceeding with the lowest bid.
Line	Item ID	Description					
1	6588012000	Recommend proceeding with the lowest bid.					
8.	After reviewing the comments, click the Analyze Total link. Analyze Total Analyze Line						
The Analyze Total page displays. Analyze Total Analyze Total Analyze Line Business Unit: 50100 Event ID: 0000160480 Round: 1 Version: 2 Event Name: UIFB Steel Pipe Liner Status: Pending Award Go To: ... Event Format: Buy Event Type: RFx Currency: USD End Date: 08/17/2026 09:40 EDT > Bid Analysis and Display Options Analysis Bidder Name Pearson Construction Inc Swipe Resources LLC Event Version Responded To 1 1 Bid Number 1 1 Total Bid Amount 379.20 453.00 Total Bid Cost 0.00 0.00 Total Event Score 100.00 99.67 Total Header Cost 0.00 0.00 Total Header Score 0.0000 0.0000 Bid Action NA NA Reject Reason Award by Percent Hide Bid Recalculate Add / Edit Factors Unhide Bids << < > >> Save Return to Search							
9.	Follow normal strategic sourcing processes to make the award. For instructions on the strategic sourcing process and awarding events, refer to the job aid entitled PR345 Setting up, Analyzing, and Awarding Strategic Sourcing Events (VDOT Only) located on the Cardinal website in Job Aids under Learning.						