State of Oklahoma COR251

Strategic Sourcing Manual Office of Management & Enterprise Services



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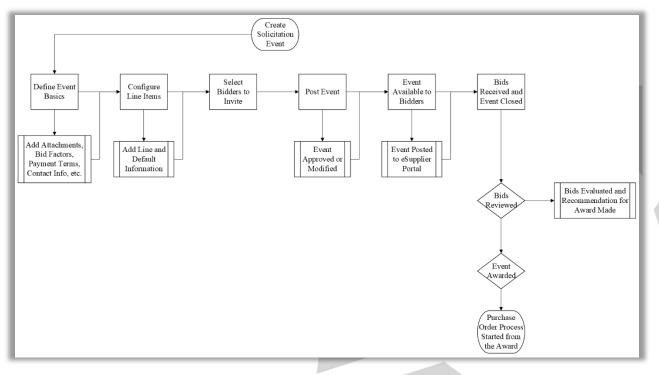


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1.0	06/26/2023	Initial Document Creation – CP
2.0	09/20/2024	Upgrade Update
	09/20/2024	



Process Flows





Create the Solicitation Event Creating a Buy Event from a Requisition

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

Create Events		
Eind an Existing Value	Add a New Value	
*Business Unit	09000 Q	
*Event ID	NEXT Q	
Event Round	1	
Event Version	1	
*Event Format	Buy ~	
*Event Type	RFx ~	
Proxy Bidding (Auctions Only)	Disabled 🗸	
Add		

Business Unit: Required field. Populate with the Agency Business Unit in which the Event is being created.

Event ID: Leave value as NEXT.

Event Format: Options are Buy, RFI, and Sell. Select the Buy option to create a Buy Event.

Event Type: RFx should be selected when the <u>Buy</u> format is selected.

Click the <u>Add</u> button to enter the Event Details page.



Define Event Summary

Create an Event												
Event Summary												
Business Unit	09000	Event ID	NEXT I	Round	1	Version	1	E	vent Forma	t Buy		
												?
Event Type	RFx		Change to Aucti	ion								
Event Status	Open					Time Zone	CST				~	
*Event Name	TST_EVENT_01					Preview Date	09/23/2024	Ē	Time	8:52AM	J	
Description	Testing Event					Start Date	09/23/2024		Time	8:52AM]	
						Q & A End Date	10/14/2024		Time	8:52AM]	
			/	:		End Date	11/07/2024		Time	8:52AM]	-
						Copy From				~	Go	

Event Name: Required field should hold the general Name of the Event.

Description: Not required, but highly recommended. Enter the purpose of the solicitation in this field.

Preview Date: Defaults to current date. Define the event Preview Date.

Start Date: Defaults to current date. Define the event Start Date.

Q & A End Date: Defaults to 21 days after start date. Define when the bidders' and suppliers' Q&A period closes. The Q & A End Date is normally 14 - 21 days after the bid Start Date depending on the complexity of the event.

End Date: Defaults to 21 days after start date. Define the event End date. The End Date should be between 30-45 days depending on the complexity of the event.

Click the <u>Save Event Changes</u> button. This button is not found on the main Event Summary page but can be found by clicking on one of the tabs under the steps.

NOTE: Make sure you are clicking "Save Event Changes" and not "Save Event" (under Step 5 Post Event) as once saved here, the pages cannot be changed without opening a new event round.

Create an Event		
Line Items		
Business Unit 09000 Event ID EV00000533 Round 1 Version 1 Event Format Buy 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 line		other allowed transaction types.
Copy From Requisition 🗸 Go	Filtered View	All Lines and Groups

Note the EventID field will change from "NEXT" and is assigned an Event ID by the system.



Copy From Option - Options to copy from a Requisition, Purchase Order, Contract, or a previous event are available.

If copying from a requisition, **click** on the <u>Copy From</u> dropdown and select the **Requisition** option.

Click the <u>Go</u> button to the right of the <u>Copy From</u> field.





Create an Event Enter Copy Criter	ria				
Copy Template					
Copy From	Requisition	~			
Select Criteria					
Business Unit	09000 Q				
*Copy Method	Override 🗸				
Select Lines	Req Lines	~			
Copy Criteria					
Requisition ID	٩				
Buyer	٩	Su	upplier SetID	٩	Supplier ID Q
SetID	٩		Item ID		
Category					
	Exclude Auto Source Item			□ Stockless Item □ Include Regs With No Suppl	Copy all Req/RFQ lines
	,				
Search					

Requisition Copy Criteria

Copy Method: Select the way the system copies the information. Values are:

- *Override:* The system replaces any existing information for the event with the data from the template.
- *Append:* The system adds information to existing event information but does not write over any fields that contain data. When copying from a specific requisition, this option is used.

Select Lines: Options are RFQ Required, RFQ Not Required, and Req Lines. If copying from a specific requisition, the user will select Req Lines from the Select Lines option.

Copy Criteria: Enter Information regarding the Requisition to copy onto the Event to narrow the search results.

Click the <u>Search</u> button.



Ct Lines											M		View All
iel Iter Set	em etiD	Item	Description	Quantity	UOM	Price	Currency	Due Date	Business Unit	Req ID	Supplier	Buyer	Ship To
000	0000		FY24 Dell Latitude 7440	1.0000	EA	39.37000	USD		09000	0900019207	0000064944	LPHAM01	09020050

The Requisition Lines to Copy page shows requisition lines that meet the search criteria entered on the previous page.

Select: Use the Select checkbox to select the requisition line(s) that you want to copy into the Event. Alternatively, use the <u>Select All</u> link option.

Click the <u>OK</u> button to copy the requisition line(s) into the event.

NOTE: Requisition lines selected will copy all the associated schedules and distribution lines.



Line Items Page

Create ar Line Item										
	Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type RFx Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.									
	Copy From Requisition Go Filtered View All Lines and Groups					~				
Line Items		Advanced Definition							14 4	1-1 of 1 🗸 🕨 🕨 View All
Lin	ne	Item ID	Description		Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
□ 1		٩	FY24 Dell Latitude 7440	Ph.	43211600 Q	EA Q	1.0000	39.3700	\$39.37	0.00000
Event Total:		USD Selected Lines	• OK					Line W	eighting Total: 0 %	Remaining Weight: 100%
< Return to	Event Ove						GoT	ō	~	Go
Refresh										Add Update/Display

The copied requisition lines will be displayed on the Line Items page. If any adjustments to the Event Lines are necessary (Quantity, Price, Weightings, etc.) need to be made, they can be done here.

Quantity: Enter the number of units to buy.

Start Price: Enter the amount at which the bidding must start if <u>Display and Must Beat Start</u> <u>Price</u> is selected. If an item is selected, the system uses the item's standard unit price as a default.

Weighting: Enter a value to indicate the importance of the line item to the entire event. If you do not enter line weightings, each line item is weighted equally.

• In this example, the Line will receive 100% weighting because it is the only line available. If there is more than one line, define the Line Weightings, if necessary.

Click the Line Details icon, to the right of the description, to view the full description.

Optionally, use the <u>Advanced Definition Tab</u> to access Bid Factors and attach documents or line comments to the Event Lines.



Advanced Definition Tab

Line	Create an Event Line Items Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type RFx Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.										
Your e	Copy From Requisition Go Go Filtered View All Lines and Groups										
E	Line Items ⑦ () () () () () () () () () (
	Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints		
	1	٩	FY24 Dell Latitude 7440	1	00000		Details	Bid Factors	No	Ģ	+
Event	Event Total: 39.3700 USD Line Weighting Total: 100 % Remaining Weight: 0% Group Selected Lines										
< Ret	urn to Event Ove Save Event C						GoTo		✓ Go		
Re	iresh									Add	Update/Display

Use the <u>Advanced Definition Tab</u> to add additional Bid Factors to the Event Lines or to add line comments or file attachments.

Click the **Details** link to view the details for the line.



Create an Event			_
GoTo Line 1 - FY24 Dell Latitude 7440	~	Next Previous	
Event ID NEXT Line 1 Item ID Description FY24 Dell Latitude 7440 □ Item Biddable Only if Grouped		Requested Quantity 1.0000 Start Price 39.3700 Physical Nature Goods 🗸	
 Shipping Information ⑦ 		Q I II II II II View All	
Schedule 1 Quantity 1.0000 Ship Via COMMON Q	Due Date 10/19/2024 111 Ship To 09020050 Q	Freight Terms Q Ship From	
Bid Required Reserve Price Bid Quantity Rule Requested Quantity Required Alternate UOM Not Allowed	Min Quantity 0.0000	Max Quantity 1.0000	
▶ Item Specification ⑦			
▶ Line Image ⑦			
< Return to Event Lines Page			

The Line Details are displayed. If necessary, make any changes to the line details or Bid Parameters.

Bid Quantity Rule:

- *Allow Extra Quantity to be Bid:* Select to allow bidders to place bids for quantities beyond the requested event quantity up to the maximum bid quantity.
- *Bid Up to Maximum Quantity:* Select to allow bidders to place bids up to a maximum quantity for the line.
- *Quantity Not Applicable:* Select for non-item lines, such as extended warranties. Bidders must enter a bid price but not a bid quantity. If you copied from an amount-only *requisition*, this will be the default value for this field and you cannot change it.
- *Requested Quantity Required:* Select to indicate that bidders must place bids for the requested quantity only.

Alternate UOM: Select a value to indicate whether bidders can bid on line items using alternate units of measure.

After reviewing the line details as necessary, click the Return to Event Lines Page link.

From the Advanced Definition page, page 12, select the Bid Factors link.



Create an Event			
Line Bid Factors	;		
GoTo Line	1 - FY24 Dell Latitude 7440	~	Next Previous
Line Item ID	1		Bid Factor Weighting Total 100.00000 Remaining Bid Factor Weight 0.00000
Description	FY24 Dell Latitude 7440		Remaining Did Factor Weight 0.00000
Bid Factors ⑦			
Seq Nbr	1		+
Bid Factor	PRICE		Type Monetary Weighting 100.00000
Question	What price are bidding?	R	 Display Bid Factor Bid Factor Response Required
		1.	Ideal Response Required Include on Contract
Best	0.000000 Worst	39.370000	
Select for deletion	Add Clauses To Bid Factor		
Add Bid Factors by Gr			E E Delete Selected Rows
			Bid Factor Weighting Total 100.00000
			Remaining Bid Factor Weight 0.00000
< Return to Event Lines	Page		
Refresh			Add Update/Display
			Aud

Weighting: Enter a value to indicate the importance of the bid factor to the line item. The system then factors weightings into the score. User must enter weightings for bid factors if you want the bid factor responses to be scored.

Display Bid Factor: Select to display the bid factor to the bidder. If this option is not selected, the bid factor is hidden from the bidder, and you can enter a response in the bid analysis pages.

Bid Factor Response Required: Select if the bidder must enter a response for the specified bid factor before successfully posting a bid.

Ideal Response Required: Select if the bidder's response must match the specified best or ideal response for the bid to be eligible for award. Bidders who do not match the specified best or ideal response can still post their bids, but their bids will be disqualified and will not be eligible for award.

Include on Contract: Select if you want the bid factor to be included as a contract agreement if the event is awarded to a supplier contract.

Add Clauses to Bid Factor: Click to access the Assign Contract Clauses page to add contract clauses.

After reviewing the Bid Factor information, click the Return to Event Lines Page link.



Create an Ev Line Items	ent									
	Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type RFx Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.									
	Copy From Requisition V Go Filtered View All Lines and Groups V									
Line Items ⑦								View All		
Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints		
1	٩	FY24 Dell Latitude 7440 🥢	1	00000		Details	Bid Factors	No	Q	+
	Event Total: 39.3700 USD Line Weighting Total: 0 % Remaining Weight: 100% Group Selected Lines OK								*	
< Return to Even	t Overview ent Changes					GoTo		✓ Go		
Refresh								(Add	Jpdate/Display

From the <u>Advanced Definition</u> page, select the comments icon on the right side of the line.



	Soucing L	_ine Comment	s				×
							Help
Create an Event Line Comments and Attachm	anta						
Event ID NEXT	Line Number 1						
Enter Comments ⑦		Q	Ⅰ	1 of 1 🗸 🕨 🕨	View All		
Comments:					+-		
comments.							
Send To Bidder	clude On Award	Fetch Item S	inecs	Standard Com	//		
	clude On Award	Fetch Item S	pecs	Standard Com			
Send To Bidder In Add Attachment	clude On Award	Fetch Item S	pecs	Standard Com			
	clude On Award	Fetch Item S	ipecs	Standard Com			
Add Attachment	clude On Award	Fetch Item S	ipecs		ments	of 1 🗸 🕨	
Add Attachment	clude On Award Attachment Description	Fetch Item S Display to Bidder	ipecs Include On Award		ments	of 1 🗸 🕨	
Add Attachment ttachments Image: Q Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	ments		
Add Attachment		Display to	Include On	Include in	ments		
Add Attachment ttachments Image: Q Attached File	Attachment Description custom_dfs_quote_114141_xlsx	Display to Bidder	Include On Award	Include in Notifications	ments		

Use the Line Comments and Attachments page to insert additional line comments or add file attachments to the Event Lines. This can be used to add your working solicitation documents if desired. If used, make sure to uncheck all the boxes as you do not want these documents sent to the bidders. This is NOT where you will post your bid documents.

Click the Add Attachment button to insert additional attachments up to 35MB document size.

Select File to create as Attachment					
You may attach up to 99 files to upload					
Choose Files No file chosen					
Upload Cancel					

Click the <u>Choose Files</u> button, then select a file to insert.

Click the <u>Upload</u> button to attach the selected file.

NOTE: The <u>View</u> button will open a new window to display the attachment.

Click the <u>OK</u> button to return to the Event Lines page after all comments and file attachments are added.

From the Event Lines page, page 11, click the Return to Event Overview link.



NOTE: Buy Events can also be created by copying from Contracts or Purchase Orders. Those options can be selected on the Event Summary page, page 7, in the <u>Copy From</u> field. The same steps will be executed shown on pages 10-16 for creating the event by copying from a Contract or Purchase Order.

t Summary												
Business Unit	09000	Event ID	NEXT	Round	1 Vers	ion 1	Ev	ent Forma	it Buy		(?)	
Event Type	RFx		Change	to Auction							Ť	
Event Status	Open				Time Zo	ne CST				_	- 11	
*Event Name	TST_EVENT_01				Preview D	og/23/202	4 🗰	Time	8:52AM			
Description	Testing Event			22	Start D	ate 09/23/202	4 🗰	Time	8:52AM]		
Description	rooming Eroni				Q & A End D	ate 10/14/202	4 🗰	Time	8:52AM			
				li	End D	ate 11/07/202	4 🗰	Time	8:52AM	Ĩ		
										Go		() () () () () () () () () ()

If copying from a Purchase Order, the copy page will appear as follows:

						-
Create an Event						
Enter Copy Criter	ria					
Copy Template						
Copy From	Purchase Order	~				
Select Criteria						
Business Unit	09000 Q					
*Copy Method	Append ~					
Copy Criteria						
Purchase Order	Q	Contract SetID	Q	Contract ID		۹
Buyer	Q	Supplier SetID	Q	Supplier ID	Q	
SetID	Q	Item ID				
Category						
L						
Search						

Copy Method: Select the way the system copies the information. Values are:

- *Override:* The system replaces any existing information for the event with the data from the template.
- *Append:* The system adds information to existing event information but does not write over any fields that contain data. When copying from a specific Purchase Order, this option is used.

Select/Copy Criteria: Enter Information regarding the Purchase Order to copy onto the Event to narrow the search results.

Click the <u>Search</u> button.



Create an Event			
Enter Copy Criter	ia		
Copy Template			
Copy From	Contract 🗸		
Select Criteria			
SetID	00000 Q		
*Copy Method	Append V		
Process Option	Purchase Order		
Contract ID	٩		
Copy Criteria			
		Supplier SetID Q	Supplier ID Q
SetID	Q	Item ID	
Category		□ Include Cancelled Lines	
Search			

If copying from a Contract, the selection page will appear as follows:

Copy Method: Select the way the system copies the information. Values are:

- *Override:* The system replaces any existing information for the event with the data from the template.
- *Append:* The system adds information to existing event information but does not write over any fields that contain data. When copying from a specific contract, this option is used.

Contract ID: Enter the Contract ID you wish to copy from.

Select/Copy Criteria: Enter Information regarding the Contract to copy onto the Event to narrow the search results.

Click the <u>Search</u> button.



Step 1: Define Event Basics

Event Settings and Options

p 1: Define Event Bas	sics				
•	ings and optional rules for this event.				
	t Settings and Options Comments and Attachments			Payment Terms a Event Constraints	
	Header Bid Factors			Event Constraints	, ,
				Event Reminder N	Notification
k the Event Setting	gs and Options link.				
eate an Event					
vent Settings and Options					
Business Unit 09000	Event ID NEXT Round 1	Version 1 Event l	Format Buy Ev	ent Type RFx	
00000					
					?
	Create PDF on Event Post	Round\Version Display	Display Round and Version	~	
	Allow Bidder XML Downloads Bid Required On All Lines		Sealed Event		
	Multiple Bids Allowed		Display Bid Factor Weight	tings	
	Allow Edit of Posted Bids				
	Do Not Use Best Bids on New Rounds		Display Bid Factor Best/W	lorst	
	Allow Send NOIA Notification			0	
	a Allow Selfe Noise Rotalication	*NOIA Report Template	AUC_NOIA_1	Q	
			Award Only after Notice E		
Notification to be Sent	Specific Bidders 🗸	*Award Template	AUC_NOA_1	Q	
	Allow Send NOA Notification				
Notification To be Sent	Only Awarded Bidders 🗸	*Non-Award Template	AUC_NONA_1	Q	
Factor Event Score Into	Total Score 🗸	Start Price	Do Not Display	~	
Header Weighting					
Line Factor Weighting					
Line / dotor morghtung			Bidders May Create Line G	COUDS	
			Allow Price Breaks with Gr		
			bit is broke with the		
 Minimum Response and Wa 	rning				
-					
Minimum numb	er of bid response	Number of days war	ning prior		
Associated Categories ⑦					
Save Event Changes		GoTo		~	Go

The Event Settings and Options page allows the user to define details for the entire Event. Most of the fields will default in and generally should not be changed unless known to the user.



Round/Version Display: Select one of these options:

- Display Round
- Display Round and Version
- Do not Display

If applicable, select a NOIA Report Template, Award Template, and Non-Award Template.

Display Bid Factor Best/Worst and **Display Bid Factor Ideal Value:** Select to show the best and worst values for the bid factor or the ideal value for the bid factor on the Create Bid Response page. If you deselect these options, then bidders will not be able to see the best and worst values or the ideal value for a bid factor on the Create Bid Response page.

Create PDF on Event Post: Select to create a PDF version of the sourcing event. If this option is not selected, PDF creation is suppressed.

Allow Bidder XML Downloads: Select to enable bidders to download events to an XML file. If this option is not selected, a PDF version of the sourcing event is created; however, an XML version is not created when the events are posted.

Bid Required On All Lines: Select this check box if you require bidders to bid on all lines on the event.

Multiple Bids Allowed: Indicates whether bidders (for RFx events) can post multiple bids on the same event.

Allow Edit of Posted Bids: Indicates whether bidders (for RFx events) can edit their posted bids until the event ends.

Do Not Use Best Bids on New Rounds: This setting defaults from the Sourcing Business Unit Definition page based on the business unit. However, you can change the setting at the event level here. Select to indicate that new rounds should not be created using best bids when the bids are countered. If you select this option, then bidders will not be able to accept the counter offer on the Create Bid Response page; bidders will be forced to rebid. In this scenario, bidders will still be able to either counter or withdraw the bid.

Display Bid Factor Ideal Value: Select to show the best and worst values for the bid factor or the ideal value for the bid factor on the Create Bid Response page. If you deselect these options, then bidders will not be able to see the best and worst values or the ideal value for a bid factor on the Create Bid Response page.

Allow Send NOIA Notification: Select to send a communication to the bidders that they have been identified for awarding a PO or contract



Generally, the <u>Create PDF on Event Post</u> box is unchecked and the <u>Bid Required on All Lines</u> box is checked.

Header Weighting: Enter a default weighting for how the system weights the header score in relation to the total score. The default value comes from the Sourcing Business Unit Definition page, but you can change it here.

• For example, assume that you set the default event header weighting to 20 percent, and then you create an event with three lines. Line 1 is weighted 50 percent, line 2 is weighted 20 percent, and line 3 is weighted 10 percent. The total weighting of the lines is 80 percent plus the defaulted weighting of the header (20 percent), totaling 100 percent if you selected to factor the header score into the total score.

Factor Event Score Info: Select to indicate that you want the system to factor the header score into the total score for the event or the individual line score.

Start Price: Select whether the Start Price is displayed.

Minimum Number of Bid Responses: Enter a number if a minimum number of bids is required. If the number of bidders' responses is less than the value specified in this field, then an alert will be displayed on the Procurement Operations Home Fluid pages under the My Sourcing Events tile and on the Navigation bar. If this field is left blank, no Alerts will be displayed for this event.

Click the arrow the left of the Associated Categories heading to expand the section.

✓ Associated C	Categories ⑦		4 4 1-1 of 1 → ▶
Category ID	Category	Description	
	٩		+ -

Input the Category Codes to be associated with the event. If the category codes are not known, it can be found on the Line Items page of the event, shown on page 11, when being copied from a requisition.

After reviewing the Event Settings and Options, click the Return to Event Overview link.



Event Comments and Attachments

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
ick the Event Comments and Attachments link.	
Create an Event	
Event ID NEXT	
Enter Comments ⑦	1 of 2 View.
Comments:	+
Lease Premium Latitude 7440 (Ultralight) Payment \$39.37 for 36 Months Quote: 300017248	2359.1 🔺 🖪
RITM0334008	
This is NOT AN ASSET All invoices shall be submitted to OMES Accounts Payable, AccountsPayable@omes.ok.gov, a recommended that invoices shall be submitted within ninety (90) days of services/products per Interest on late payments made by the State of Oklahoma is governed by 62.0.5. 834.71 and f	and invoice shall reference the Purchase order. It is strongly formed/delivered for prompt payment.
Send To Bidder	Standard Comments
Add Attachment	
OK Cancel Refresh	

Use the Event Header Comments and Attachments page to insert additional header comments or add file attachments to the Event Header. This is where the user will enter all the bid documents that bidders will respond to.

Send to Bidder: Select to enable the bidder to see the comment.

Include on Award: Select to enable the comments to appear on the contract or purchase order award.

NOTE: This page attaches files and comments at the Event Header level.

To add or delete additional comments, use the plus and minus (+/-) buttons.

Click the <u>Add Attachment</u> button to insert an attachment.



Select File to create as Attachment	×
You may attach up to 99 files to upload Choose Files No file chosen	
Upload Cancel	

Click the <u>Choose Files</u> button and select a file to add as an attachment.

Click the <u>Upload</u> button to attach the file.

Attachments ⑦				14	 1-1 of 1 ♥
Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
COR251.doc		V	V		View –

Display to Bidder: Select to enable the bidder to see the comment.

Include on Award: Select this check box if you want to include this attachment with the award.

Include in Notifications: Select to include the attachment in the event invite and event interest notifications that are sent to the bidders.

Generally, do not select <u>Include in Notifications</u> when initially creating an event. When this is selected, all attachments are included in email notifications.

NOTE: User must select the Display to Bidder and Include on Award checkboxes if they want the attachments or comments to display. If none are checked the Supplier will get an error on the public portal.

Click the <u>**OK**</u> button to return to the Event Summary page after all comments and file attachments are added. It is highly recommended to click the <u>**Save Event Changes**</u> button after attaching any documents.



Event Header Bid Factors

Select for deletion

tep 1: Define E	Event Basics , 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
ck the Eve	nt Header Bid Factors link.		
odify an Event			
vent Bid Facto	rs		
Event ID	EV00000533		Bid Factor Weighting Total 100.00000
Event Name	TST_EVENT_01		Remaining Bid Factor Weight 0.00000
id Factors ⑦			
Seg Nbr	1		+
	SALES_TAX Q	Type	Yes/No Weighting 100.00000
Question	Do you have an Oklahoma Sales Tax Permit?	ijpe	Display Bid Factor?
			I Bid Factor Response Required ☐Ideal Response Required ☐Include on Contract
	Yes\No		
	® Yes ○ No		

The Event Bid Factors page will default in the bid factor questions that are included on all state events when copying a requisition onto an event.

NOTE: When creating an event from scratch, this page will default without Event Header Bid Factors. <u>After inputting line item details and saving the event, the default Bid Factors will appear</u> on this page. These Bid Factors do **not** need to be entered manually when creating an event from scratch.

If a specific Bid Factor question needs to be added, **click** the <u>**plus**</u> (+) button to insert a new question below that sequence. For example, if the plus button is clicked in the first sequence, a new question will be added as the second sequence. **Click** the <u>**minus**</u> (–) button to delete a question.



Bid Factor: Choose from a list of predefined Bid Factor templates. When adding new Bid Factors, click the lookup icon to the right of the bid factor field, and select an option. This will default the remaining fields. Bid Factors can also be searched for by clicking the Select Bid Factors link.

Weighting: Enter a value to indicate the importance of the bid factor to the line item. The system then factors weightings into the score. The user must enter weightings for bid factors if you want the bid factor responses to be scored.

Display Bid Factor: Select to display the bid factor to the bidder. If this option is not selected, the bid factor is hidden from the bidder, and you can enter a response in the bid analysis pages.

Bid Factor Response Required: Select if the bidder must enter a response for the specified bid factor before successfully posting a bid.

Ideal Response Required: Select if the bidder's response must match the specified best or ideal response for the bid to be eligible for award. Bidders who do not match the specified best or ideal response can still post their bids, but their bids will be disqualified and will not be eligible for award.

Add Clauses to Bid Factor: Click to access the Assign Contract Clauses page to add contract clauses.

Include on Contract: Select if you want the bid factor to be included as a contract agreement if the event is awarded to a supplier contract.

Add Bid Factors by Group: Click this link to search for Bid Factor groups to be included.

After reviewing the Bid Factor questions, click the Return to Event Overview link.



Payment Terms and Contact Information

Step 1: Define Ever					
Enter basic information, gen	eral settings and option	nal rules for this event.			
	* Event Settings an Event Comments a Event Header Bid F	nd Attachments			Payment Terms and Contact Info Event Constraints
	Event header blu r	actors			Event Reminder Notification
ick the Paymen	t Terms and	Contact Info link			
Create an Event					
Event Contact De	tails				
Payment & Currency	nformation ⑦				
*Currency	USD Q	Exchange Rate	*Rate Type	CRRNT Q	
Pay Method	~		Rate Date	09/23/2024	
Payment Terms	۹			Allow bids in oth	er currencies
Bill Addrs	09000 Q			Tax Exempt	
Buyer	BBENN06 Q		Exempt ID		
Event Contact ⑦					
Contact Name	Bosten Benn				
Email ID	noreply@omes.ok.	gov			
Phone					

Pay Method: Optionally, populate the payment method for the PO that will be generated from the Event Award.

Refresh

Payment Terms: Optionally, populate the payment terms for the PO that will be generated from the Event Award. Generally, 45 is used for the Payment Terms. Payment Terms are net 45 by statute unless an early pay discount is offered.

Buyer: Defaults to the Buyer creating the Event. Select a user to be assigned to this event.

NOTE: If the buyer needs to be updated after the event has been posted, the user will need to **Create a New Version** from the Event Workbench, shown later in this manual. This will need to be approved before being posted to the website again.



Update/Display

Add

Contact Name: This is generally the Buyer name. This will print at the top of the paper bid document and be visible at the top of the page when suppliers are bidding electronically.

Email ID: This should hold the Email of the Event Creator (Buyer). System generated emails will be sent to the address including undelivered emails to invited bidders. This email will be visible to bidders when responding electronically and allow them to send emails directly to this email address with questions, etc.

Phone: Generally, the buyer phone number. This will print at the top of the paper bid document and be visible at the top of the page when suppliers are bidding electronically.

Ensure the Bill To Address and Buyer Email ID & Phone fields are correct.

Click the <u>Save Event Changes</u> button.

Select the Return to Event Overview link to return to the main Event Summary page.



Event Reminder Notification

	ne Event Basics					
ter basic inform	ation, general settings and optional	rules for this event.				
	* Event Settings and C Event Comments and Event Header Bid Fac	Attachments			Payment Terms a Event Constraints	
	Event fleader blut ac	.015			Event Reminder N	Votification
ck the Ev	ent Reminder Notifi	cation link.				
	It er Notification Unit 09000 Event ID NEX	XT Round 1	Version 1 E	Event Format Buy	Event Type RF	=x
	v Event Reminder Notification					
	v Event Reminder Notification			14 4 1-1 of 1	✓ ► ► View	All
Event Reminde		Notification Date	*Audience	14 4 1-1 of 1		All
Event Reminde	r Notification Options	Notification Date 10/11/2024	*Audience			All
Event Reminde	T Notification Options Day(s) Prior to Event End Date 1 3 Cation to Event Creator 1 Day(s)			*Message Priority	,	

The Event Reminder Notification page can be used to define the configuration settings for sending notifications. By default, the page displays the details specified on the Sourcing - Business Unit Definition page, if specified. You can modify the values, if required.

If the event end date is less than the Event Notification dates, a message displays when you save it. You can either modify the notification date or proceed with the existing date. If you have not modified the end date, the same message displays again when you post the event.

The bidders or suppliers receive a notification when the process request is submitted successfully.

NOTE: For already sent notifications, the particular row is displayed as read only.



Step 2: Configure Line Items

Step 2: Configure Line Items Create line listings for this event.	
* Line Items	Item Line Defaults
Click the Line Items link.	
Create an Event Line Items	

Your ev	Business Ur ent may consis		NEXT Round 1 Version ind, optionally, ad-hoc items. You can create the		Event Format Buy nanually, or by copying lin		Event Type ing event or tem		ed transaction types.		
		Copy From Requisition	✓ Go		,, , , , , ,		-		and Groups	~	
Line It	ems ⑦										
I	Q								H. A	1-1 of 1 🗸 🕨 🕅 View	w All
Ba	sic Definition	Advanced Definition									
	Line	Item ID	Description		Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting	
	1		FY24 Dell Latitude 7440	æ	43211600 Q	EA Q	1.0000	39.3700	\$39.37	100.00000	-
Event 1	Fotal: 39.3700 U Group	JSD Selected Lines	▼ OK					Line V	/eighting Total: 100 %	Remaining Weight: 0%	
< Retu	m to Event Ove						Goī	То	~	Go	
Refr	esh	,								Add Update/Disp	play

Since this example was copied from a Requisition, the Line Item page was completed on previous pages.

Review the information on the Line Items page to ensure it is valid and make any necessary changes, then click the <u>Save Event Changes</u> button.

Click the Return to Event Overview link.



Step 3: Select Bidders to Invite

Step 3: Select Bidders to Invite Send out targeted invitations to this event, de	
* Bidder Invitat	tions

Click the Bidder Invitations link.

Create an Event											
Invite Bidders											
Business Unit		rent ID EV00000533	Round 1	Version 1 Event Form	at Buy	Event Type F	RFx				
Bidder Invitation List	?										
■ Q	■ Q										
Bidder ID	Bidder Type	Status	Location	Bidder Company	Category	Diversity	*Dispatch Method				
PUBLIC_AUC	Public		1	This is a Public Event			Email		-		
Search for Bidders					Save Bidders a	as Group					
Save Event Cha		Upload Cor	tacts from file]	ЗоТо		✓ Go]			
< Return to Event Overvie	ew										

The Invite Bidders page shows the list of all Suppliers that have been invited to bid on the Event. At this point in the Event creation, no Suppliers have been invited.

In most cases, the **Public Event** checkbox should be selected to allow the event to be posted to the public supplier portal. This will default the information shown above into the Bidder Invitation List.

This is where you will add any suggested bidders as well as the agency CPO and any others you want to receive a notification. Make sure to include yourself if you want to receive a notification.

To invite specific bidders, click the Search for Bidders link.



		Bidder Search
Search Criteria ⑦ Use Saved Search Bidder Type Bidder and Name/Company = SIC Type SIC Type SIC Code Show More Category Criteria ⑦ Profile Question Criteria ⑦ Diversity Criteria ⑦	Supplier v Q Q Q	ID Q State Q TIN City
Results Option Display All	Contacts Recommend Bidders	Type Maximum Rows retrieved 50
	Enter search criteria and press search	
	and search enteria and press search	
Return to Invite Bidders	Cancel	

The <u>Search</u> button retrieves all Suppliers that match the Search Criteria defined in the top of the page.

The <u>**Recommend Bidders**</u> button looks for duplicates in the search results. Select to Search for matches by Bidder Type and the items or item categories in the event lines.

NOTE: These two (2) buttons should be used in combination together. The user should click the Search button, then the Recommend Bidders button to remove some duplicates.

Used Saved Search: User has the option to save Search Criteria to be used with the Save Search Criteria link. Once saved, the search criteria is saved in this dropdown.

ID: This is the Bidder/Supplier ID for a specific Bidder/Supplier if you wish to search for a specific one.

The **Category Criteria** and **Profile Question Criteria** sections can be expanded to access more search criteria by clicking on the arrow to the left of the section name.

Category: Enter the category code associated with your bid.

Maximum Rows retrieved: Increase the number of suppliers displayed in the Search Results section if necessary. 9998 is the maximum allowed value.

Enter search criteria and **click** the <u>Search</u> button then click the <u>Recommend Bidders</u> button.



h Res	ulte									н
Q	Juits								I€ € 1-50 c	of 50 v 🕨 🖭 View
	Bidder ID	Bidder Type	Status	Location	Name	Bidder Company	Open for Ordering	Category	Diversity	Invite
1	0000014268	Supplier	Approved	(0006 Q,	ALEX BALLESTEROS	SHI INTERNATIONAL CORP	Yes	80	200	
2	0000018545	Supplier	Approved	0001 Q		RENAISSANCE LEARNING INC	Yes	80	°°°	0
3	0000018545	Supplier	Approved	0001 Q	TRACIE MANN	RENAISSANCE LEARNING INC	Yes	80	<u></u>	
4	0000018545	Supplier	Approved	0001 Q	SHELLEY TESNOW	RENAISSANCE LEARNING INC	Yes	8	<u></u>	
5	0000018545	Supplier	Approved	0001 Q	SALLY SMITH	RENAISSANCE LEARNING INC	Yes	88	ĉ	
6	0000018545	Supplier	Approved	0001 Q	Bid Notification	RENAISSANCE LEARNING	Yes	86	ന്	
7	0000018545	Supplier	Approved	0001 Q	JAIME RICKABY	RENAISSANCE LEARNING	Yes	80	200	

Invite: Use this checkbox to invite suppliers to this Event. Optionally, use the Select All and/or Deselect All hyperlinks to invite bidders.

The Category and Diversity icons can be used to view additional information.

Once the desired Suppliers have been selected to invite, **click** the <u>**Return to Invite Bidders**</u> button.

Business (Jnit 09000 E	vent ID EV00000533	Round 1	Version 1 Event Form	nat Buy	Event Type RFx	c .		
Diversity Inform	mation ⑦								
Public Event	_								
dder Invitation L	.ist ⑦							 1-2 of 2 v 	I View
									I VIEW
idder ID	Bidder Type	Status	Location	Bidder Company	Category	Diversity	*Dispatch Method		
	Public		1	This is a Public Event			Email		-
UBLIC_AUC									_
UBLIC_AUC	Supplier	Approved	0006	SHI INTERNATIONAL CORP	80	്റ്	Email 🗸		

The bidders selected to invite will be added to the Bidder Invitation List, shown above.

Dispatch Method: Options are Email, Fax, and Print. For the suppliers you want to receive automatic email notification, set this field to Email. This field should default to email but should be confirmed on this page.

Click the Bidder Details icon, to the right of the Dispatch Method field, to view the Bidder Contact information including the Email address that will receive automatic Event Notification.



		Bio	dder Details ×
			Help
Setid	00000	Bidder ID	0000014268
Bidder Type	Supplier	Location	0006
Bidder Contact Info	þ		Q I I I I I I View All
*Contact Seq Num Name	1 Q ALEX BALLESTEROS		+ -
Email *Address	noreply@omes.ok.gov		
Address 1	290 DAVIDSON AVENUE	E	
Address 2 Address 3			
City	SOMERSET		County
State	NJ Pos	stal 08873	Country USA
OK	Refresh		

If necessary, change the **Contact Sequence Number** to the desired contact that contains the email address that you want automatic Event Notifications sent to.

Additional Contacts can be added by clicking the **<u>plus</u>** icon and entering Bidder contact information.

Click the <u>OK</u> button to return to the Invite Bidders page.

Bidder ID	Bidder Type	Status	Location	Bidder Company	Category	Diversity	*Dispatch Method		
PUBLIC_AUC	Public		1	This is a Public Event			Email	8	-
0000014268	Supplier	Approved	0006	SHI INTERNATIONAL CORP		200	Email 🗸		-
earch for Bidders					Save Bidders as	Group			

Once all Bidders (Suppliers) have been invited to the Event and the Contact information (email addresses) is complete, **click** the <u>Save Event Changes</u> button then **click** the <u>Return to Event</u> Overview link to return to the Event Summary page.



Document Status Inquiry

Related Lin	iks:							
	Do	cument Status Inqui	ry					II Attachments for Ever ask Associations
om the Ev	vent Over	rview page, c	lick the	Documen	t Status In	quiry link.		
ourcing Doc	ument Status	s Inquiry						
Business Unit	Even	t ID Rou	nd Vers	sion	Created By			
09000	EV0	0000533 1	1		Bosten Benn			
Event Status	Start	Date	Event Amount		Currency			
equisitions(1)		ocurement Contracts Orders	e Service Work Orders	Receipts	Returns	Vouchers Pa	yments	
Show All	ment							
в Q							I	1 🗸 🕨 🕅 View /
Documents	Related Info	IÞ						
ctions	Business Unit	Document Type	Document ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions	09000	Requisition	0900019207	Approved	04/04/2024			B
Return to Search	h	1		1	1	1		

The link will open the page in a new tab that allows the user to view the status of documents associated with sourcing events.

If requisitions, purchase orders, or contracts are associated with an event, you can view them on the Sourcing Document Status Inquiry page.

If requisitions were consolidated into an event, the Document Status Inquiry page lists each requisition. Then once you award an event, the inquiry shows the related contract, purchase order, or multiple purchase orders (if the award is for an event derived from multiple requisitions). This information is available only for buy events.

The Document ID link can be clicked to view the Requisition in a new tab.



An example of the Document Status Inquiry page after vouchers have been added and payments are listed is shown below:

usiness Unit	E	vent ID	Round	Version	Created By				
34500	1	EV00000019	1	1	Gai Hunter (580)				
vent Status	Status Start Date Event Amount Currency								
Awarded	(05/20/10 12:31PM	CDT 5000.0	01000	USD				
equisitions(1)	Sourcing Events	Procurement Contracts	Purchase Orders(1)	Service Rect Work Orders		Vouchers(1)	Payments(1)		
Show All									
Biggin Contract Contr		nfo ∥▶						I 1-4 of	f4 ♥ → → View A
щ Q	cument	nfo ∥⊧ Business Unit	Document Type	Document ID	Status	Document Date	Supplier ID	Id d 1-4 of	Go To Document Statu:
III Q Documents	eument	Business	Document Type Payment		Status Posted	Document Date 08/10/2010	Supplier ID 0000202457		Go To Document Statu
Documents	Related in SetID	Business		ID				Location	Go To Document Statu Inquiry
Q Documents ctions Actions	Related in SetID	Business Unit	Payment	ID 105282738	Posted	08/10/2010	0000202457	Location 0002	Go To Document Statu: Inquiry

The links outlined at the top of the page can be selected to view the associated document.

Alternatively, the Document ID hyperlink can be selected in the Documents tab of the page.



Step 4: Post the Event

Step 5: Post Event When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.					
	Save Event		Save As Template		
	Post				

Event Collaborators are not currently used, therefore, posting occurs following Bidder Invitations.

When all Event information is complete and reviewed for accuracy, **click** the <u>Save Event</u> button to save your work.

If the Event is ready to Post, **click** the **Post** button. If not, posting can be done at a later time.

NOTE: If any bidder/supplier changes or communications need to happen before the email notifications go out – set up Supplier User ID's, change Contact Email address, etc. – do those before you Post the Event. Once you hit the **Post** button, all automatic email invitations will be sent to the Supplier Contact email addresses defined in the system at that time.

This will submit the Event for Approval. (18058,207) Once the event is approved and posted you will be lim you are not done making changes to the event.	ited to the changes	that you can	make to the event. Click Ok	K to continue or Cancel if
	ОК	Cancel		

When the Post button is clicked, a warning message indicating the Event will be posted is displayed. **Click** the **OK** button to post the Event.



Event Approval Inquiry

Step 5: Post Event When all event creation activ		r event for scheduled external viewing and	trigger any bidder invitations you may have defined.
	Save Event		Save As Template
	Post		
Related Links:			
	Document Status Inquiry		View All Attachments for Event Plan Task Associations
	Event Approval Inquiry		FIAIT TASK ASSOCIATIONS

After selecting the <u>Post</u> button, the <u>Event Approval Inquiry</u> link will display. Click the link to view the Approval Workflow in a new tab.

roval Status				
Business Unit 09000 Eve	ent ID: EV00000533	Round 1 Vers	ion 1	Format Buy
Event Type RFx		Start Dat	e 09/23/202	24 10:49AM CDT
Event Status Pending Po	st Approval	End Dat	e 10/14/202	24 10:49AM CDT
Event Name TST_EVEN	T_01	Entered B	y BBENNO	6
Description Testing Eve	nt			
eview/Edit Approvers				
eview/Edit Approvers Sourcing Approval				
	ending	∎Start New Path		
Sourcing Approval Approval Status:P Sourcing Approval	ending	●Start New Path		
Sourcing Approval Approval Status:P	ending –	■Start New Path		
Sourcing Approval Approval Status:P Sourcing Approval Pending Multiple Approvers	-	Start New Path		

Click the Multiple Approvers link to view the users in the workflow path.

Use the Start New Path button to insert an Ad Hoc approval level.

NOTE: If any supplier changes or communications need to happen before the email notifications go out – set up Supplier User ID's, change Contact Email address, etc. – do those before the event is approved. Once the event is approved, all automatic email invitations will be sent to the Supplier Contact email addresses defined in the system at that time. You should also receive a notification if you entered your email information in the Public event tab.



Creating a Buy Event Without a Requisition

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

Create Events			1	
<u>Find an Existing Value</u>	Add a New Value			
*Business Unit *Event ID				
Event Round	1		_	
Event Version	1			
*Event Format	Buy	~		
*Event Type	RFx	~		
Proxy Bidding (Auctions Only)	Disabled	~		
Add				

Business Unit: Required field. Populate with the Agency Business Unit in which the Event is being created.

Event ID: Leave value as NEXT.

Event Format: Options are Buy, RFI, and Sell. Select the <u>Buy</u> option to create a Buy Event.

Event Type: RFx should be selected when the <u>Buy</u> format is selected.

Click the <u>Add</u> button to enter the Event Details page.

NOTE: Creating an event without copying from a Req, Purchase Order, or Contract would be rare and require special permission.



Define Event Summary

ent Summary											
Business Unit	09000	Event ID	NEXT	Round	1 Version	1	Eve	nt Forma	t Buy		
Event Type	RFx		Change	to Auction							
Event Status	Open				Time Zone	CDT				1	
*Event Name	TST_EVENT_2				Preview Date	09/24/2024	Ē	Time	11:04AM	J	
Description	Testing Event 2				Start Date	09/24/2024		Time	11:04AM]	
					Q & A End Date	10/24/2024		Time	11:04AM]	
				1.	End Date	11/08/2024		Time	11:04AM]]	-
					Copy From				~	Go	J

Event Name: Required field should hold the general Name of the Event.

Description: Not required, but highly recommended. Enter the purpose of the solicitation in this field.

Preview Date: Defaults to current date. Define the event Preview Date.

Start Date: Defaults to current date. Define the event Start Date.

Q & A End Date: Defaults to 21 days after start date. Define when the bidders' and suppliers' Q&A period closes. The Q & A End Date is normally 14 - 21 days after the bid Start Date depending on the complexity of the event.

End Date: Defaults to 21 days after start date. Define the event End date. The End Date should be between 30-45 days depending on the complexity of the event.

Click the Save Event Changes button.

Note the EventID field will change from "NEXT" and will be assigned an Event ID by the system.



Step 1: Define Event Basics

Complete Step 1, shown on pages 19-28, to define event basic information.

Step 2: Configure Line Items

	-	onfigure Line It stings for this event.	ems									
		* Line	tems						Ite	em Line Defa	ults	
licł	the l	Line Items lin	k.									
Create	e an Event											
Line I	tems											
	ems (?	Copy From	optionally, ad-hoc items. You can create the ex				-		and Groups	▼ 1-1 of 1 ▼ ▶ ▶	Vie	ew All
	sic Definition	Advanced Definition										
	Line	Item ID	Description		Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting		
	1	٩	The second secon	2	٩	٩				0.00000	+	-
Event T	otal: 0.0000 U Group	Selected Lines	• OK					Line V	Veighting Total: 0 % F	Remaining Weight: 100	%	

When creating an event from scratch, line item information will need to be inputted directly.

Enter Line Information if known or use the lookup icon in the Item ID field to search for items. Selecting an Item ID from the lookup icon will default most of the remaining fields.

Item ID: Select the item from the item master. The description of the Item ID displays by default. If an Item ID is not selected, a Category code should be selected.

Category: Displays by default the category from the specified item or asset. If adding an item by description rather than Item ID, select a category. Any bid factors that you assign to the specified category are added to the line bid factors.

UOM: Select a Unit of Measure.

Qty: Input a quantity value.

Start Price: Enter the amount at which the bidding must start if <u>**Display and Must Beat Start**</u> <u>**Price**</u> is selected. If an item is selected, the system uses the item's standard unit price as a default.



	e an Event											
	Line Items Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type RFx Your event may consist of litems 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 v											
Line It	Line Items ⑦											
F												
Ba	sic Definition	Advanced Definition										
	Line	Item ID	Description		Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting		
	1	[100000004 Q,]	INK CART:BRO Item # LC31C- BRT, Cyan Ink cartridge for Brother PPF 1920C Multifunction Machine		44103105	EA Q	1	13.0000		0.00000	+	-
Event	Total: 0.0000 U Group	SD Selected Lines	~ Ок					Line	Weighting Total: 0 %	Remaining Weight: 100	%	

Add multiple line items as needed by selecting the **plus (+)** button at the end of the line.

Weighting: Enter a value to indicate the importance of the line item to the entire event. If you do not enter line weightings, each line item is weighted equally.

Click the **Advanced Definition** Tab.



Advanced Definition

ine It											
	Business Un nt may consist		EXT Round 1 Version I, optionally, ad-hoc items. You can create the		ent Format Bi y, or by copying I		Event Type RFx g event or template, o	r other allowed	transaction types.		
		Copy From	✓ G₀				Filtered Viev	All Lines an	d Groups 🗸		
ne Ite	ms 🕐										
I	۹								i∢ ∢ 1-1 of	1 🗸 🕨	View A
Basi	c Definition	Advanced Definition									
	Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints		
0	1	100000004 Q	INK CART:BRO Item # LC31C- BRT, Cyan Ink cartridge for Brother PPF 1920C Multifunction Machine	1	00000		Details	Bid Factors	No	Q	+

Use the <u>Advanced Definition Tab</u> to add additional Bid Factors to the Event Lines or to add line comments or file attachments.

Click the **Details** link to view the details for the line.



Create an Event	
Line Details	
GoTo Line 1 - 1000000004 INK CART:BRO Item # LC31C-BR 🗸	Next Previous
Event ID NEXT	Requested Quantity 1.0000
Line 1	Start Price 13.0000
Item ID 100000004	Physical Nature Goods ~
Description INK CART:BRO Item # LC31C-BRT, Cyan Ink cartridge for Brother PPF 1920C Multifunction Machine	
▼ Shipping Information ⑦	Q 4 4 1 of 1 ~ > > View All
Schedule 1 Quantity 1.0000 Ship Via COMMON Q Ship To 09003 Q • Bid Parameters ?	Freight Terms Q Ship From
Bid Required Min Quantity 0.0000	Max Quantity 1.0000
Bid Quantity Rule Requested Quantity Required V	
Alternate UOM Not Allowed	
▶ Item Specification ⑦	
▶ Line Image ⑦	
< Return to Event Lines Page	

The Line Details are displayed. Complete the Shipping Information for the line item.

Due Date: Select a due date for shipment.

Freight Terms: Select the freight terms to associate with this event.

Ship via, Ship to, and Ship From: Enter values for these fields. Ship Via and Ship From are optional.

Bid Quantity Rule:

- *Allow Extra Quantity to be Bid:* Select to allow bidders to place bids for quantities beyond the requested event quantity up to the maximum bid quantity.
- *Bid Up to Maximum Quantity:* Select to allow bidders to place bids up to a maximum quantity for the line.
- *Quantity Not Applicable:* Select for non-item lines, such as extended warranties. Bidders must enter a bid price but not a bid quantity. If you copied from an amount-only *requisition*, this will be the default value for this field and you cannot change it.
- *Requested Quantity Required:* Select to indicate that bidders must place bids for the requested quantity only.



Δ.

Alternate UOM: Select a value to indicate whether bidders can place bids using alternate units of measure.

After reviewing the line details as necessary, **click** the Return to Event Lines Page link.

From the Advanced Definition page, page 42, select the Bid Factors link.

One ata an Europt			
Create an Event Line Bid Factors			
-	1 - 1000000004 INK CART:BRO Item # LC31C-BRT, Cya ➤	Next Pre	evious
Line Item ID Description	1 1000000004 INK CART:BRO Item # LC31C-BRT, Cyan Ink cartridge for Brother PPF	Bid Factor Weighting Total 100.00000 Remaining Bid Factor Weight 0.00000 PF 1920C Multifunction Machine	
Bid Factors ⑦ Seq Nbr Bid Factor Question	1 PRICE What price are bidding?	Type Monetary Weighting 100.00000 Display Bid Factor Bid Factor Response Required	
Best	0.000000 Worst 13.000000 Add Clauses To Bid Factor	☐ Ideal Response Required ☐ Include on Contract	
Add Bid Factors by G		E Delete Selected Rows	
		Bid Factor Weighting Total 100.00000 Remaining Bid Factor Weight 0.00000	
< Return to Event Line	s Page		

Use the **plus** (+) button to create Line Bid Factors.

Bid Factor: Choose from a list of predefined Bid Factor templates. When adding new Bid Factors, click the lookup icon to the right of the bid factor field, and select an option. This will default the remaining fields.

Weighting: Enter a value to indicate the importance of the bid factor to the line item. The system then factors weightings into the score. User must enter weightings for bid factors if you want the bid factor responses to be scored.

NOTE: These Bid Factors apply to the line only, not the whole event.

After reviewing the Bid Factor information, click the Return to Event Lines Page link.

From the <u>Advanced Definition</u> page, page 42, select the comments icon on the right side of the line.



	Souci	ng Line Comments	×
			Help
Create an Event			
Line Comments and A	ttachments		
Event ID NEXT	Line Number 2		
Enter Comments ⑦		Q I I I I I I I I I View All	
Comments:		+	
Send To Bidder	Include On Award		
		Fetch Item Specs Standard Comments	
Add Attachment			
Attachments ⑦			
E Q		I I-1 of 1 🗸 🕨	H
Attached File	Attachment Description	Display to Bidder Award Notifications	
COR251.doc		View	
OK Cancel	Refresh		

Use the Line Comments and Attachments page to insert additional line comments or add file attachments to the Event Lines. This page can be used to add your working solicitation documents if desired. If used, make sure to uncheck all the boxes as you do not want these documents sent to the bidders. This is NOT where you will post your bid documents.

Click the **plus** (+) button to insert more than one comment.

Click the Add Attachment button to insert attachments up to 35MB in document size.

Select File to create as Attachment	×
You may attach up to 99 files to upload Choose Files No file chosen	
Upload Cancel	

Click the <u>Choose Files</u> button, then select a file to insert.

Click the <u>Upload</u> button to attach the selected file.

NOTE: The <u>View</u> button will open a new window to display the attachment.

Click the <u>OK</u> button to return to the Event Lines page after all comments and file attachments are added.



Line	Modify an Event Line Items Business Unit 00000 Event ID EV00000534 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 ⑦												
	Line	Item ID	Description Category "UOM "Qty Start Price Ext. Amount Weighting									
	1	[100000004 Q]	INK CART:BRO Item # LC31C- BRT, Cyan Ink cartridge for Brother PPF 1920C Multifunction Machine		44103105	EA Q	1.0000	13.0000	\$13.00	0.00000	+	-
Event	Event Total: 13.0000 USD Group Selected Lines OK OK											
< Retu	rn to Event Ov Save Event (G	ото	~	Go		

After inputting line item information and reviewing the advanced definition tab, **click** the <u>Save</u> <u>Event Changes</u> button.

Click the Return to Event Overview link.

NOTE: To view the default Bid Factors after saving the Line Information, select Event Bid Factors from the Event Summary page, under Step 1.



Business Unit	09000 Event ID EV00000						
Event Type	RFx Ch	ange to Auction					0
Event Status			Time Zone			7	
*Event Name	TST_EVENT_2		Preview Date	09/24/2024	Time 3:33PM		
Description	Testing Event 2	1. International Contraction of the second se	Start Date	09/24/2024	Time 3:33PM		
			Q & A End Date	10/15/2024	Time 3:33PM		
		17	End Date	10/15/2024	Time 3:33PM		
			Copy From		~	Go	
ep 1: Define Even er basic information, ger	nt Basics eral settings and optional rules for this event. * Event Settings and Options Event Comments and Attachments Event Header Bid Factors			Payment Term Event Constra	s and Contact Info ints		
				Event Remind	or Notification		
	Line Items			Event Remind	er Notification		
reate line listings for this e	Line Items vent. * Line Items			Event Remind			
eate line listings for this e tep 3: Select Bidd and out targeted invitation: tep 4: Invite Colla	Line Items vent. * Line Items ders to Invite s to this event, designate it as a public event, or * Bidder Invitations		wing it.				
eate line listings for this e tep 3: Select Bidd and out targeted invitation: tep 4: Invite Colla	Line Items vent. * Line Items ders to Invite s to this event, designate it as a public event, or * Bidder Invitations uborators		wing it.				
tep 3: Select Bidd end out targeted invitation: tep 4: Invite Colla vite others to collaborate of tep 5: Post Event	Line Items vent. * Line Items ders to Invite s to this event, designate it as a public event, or * Bidder Invitations borators on this event. You may not post your event while Event Collaborators	collaborators are revie		ltem Line Defa	ults		
eate line listings for this e tep 3: Select Bidd and out targeted invitation: tep 4: Invite Colla vite others to collaborate of tep 5: Post Event	Line Items vent. * Line Items ters to Invite s to this event, designate it as a public event, or * Bidder Invitations biorators on this event. You may not post your event while Event Collaborators	collaborators are revie		Item Line Defa	ults		
tep 4: Invite Colla vite others to collaborate of tep 5: Post Event	Line Items vent. * Line Items fers to Invite s to this event, designate it as a public event, or * Bidder Invitations borators on this event. You may not post your event while Event Collaborators t ivities are complete, click Post Event to release y	collaborators are revie		Item Line Defa	ults you may have defined		
tep 3: Select Bidd end out targeted invitation: tep 4: Invite Colla vite others to collaborate of tep 5: Post Event	Line Items vent. * Line Items ders to Invite s to this event, designate it as a public event, or * Bidder Invitations borators on this event. You may not post your event while Event Collaborators : ivities are complete, click Post Event to release y Save Event	collaborators are revie		Item Line Defa	ults you may have defined		
eate line listings for this e tep 3: Select Bidd end out targeted invitation: tep 4: Invite Colla vite others to collaborate of tep 5: Post Event frem all event creation act Related Links:	Line Items vent. * Line Items ders to Invite s to this event, designate it as a public event, or * Bidder Invitations borators on this event. You may not post your event while Event Collaborators tivities are complete, click Post Event to release y Save Event Post Document Status Inquiry	collaborators are revie		Item Line Defa	ults you may have defined ave As Template ments for Event		
reate line listings for this e tep 3: Select Bidd end out targeted invitation: tep 4: Invite Colla vite others to collaborate of tep 5: Post Event then all event creation act Related Links:	Line Items vent. * Line Items ders to Invite s to this event, designate it as a public event, or * Bidder Invitations borators on this event. You may not post your event while Event Collaborators t ivities are complete, click Post Event to release y Save Event Post	collaborators are revie		Item Line Defa ger any bidder invitations	ults you may have defined ave As Template ments for Event		

Complete Step 3, shown on pages 30-35.

Step 4: Post the Event

After reviewing the Event information, post the Event, shown on page 36.



Creating an RFI Event

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

Create Events		
<u>F</u> ind an Existing Value	Add a New Value	
*Business Unit	t 09000 Q	
*Event ID	NEXT Q	
Event Round	1 1	
Event Version	1	
*Event Format	RFI 🗸	
*Event Type	e RFx 🗸	
Proxy Bidding (Auctions Only)	Disabled ~	
Add		

Business Unit: Required field. Populate with the Agency Business Unit in which the Event is being created.

Event ID: Leave value as NEXT.

Event Format: Options are Buy, Sell, and RFI. Select the RFI option to create an RFI Event.

Event Type: RFx will be automatically selected when RFI is chosen as the Event Format and cannot be changed.

Click the <u>Add</u> button to enter the Event Details page.



Define Event Summary

ent Summary										
Business Unit	09000	Event ID	NEXT	Round	1 Versio	n 1	Event	Format	RFI	
Event Type	RFx									
Event Status	Open				Time Zone	CDT		_		
*Event Name	TST_RFI_EVENT				Preview Date	09/25/2024	Ē	Time	10:55AM	
Description	RFI Testing Event				Start Date	09/25/2024		Time [10:55AM	
					Q & A End Date	10/25/2024		Time	10:55AM	
				1.	End Date	11/09/2024		Time [10:55AM	
					Copy From				~	Go

Event Name: Required field should hold the general Name of the Event.

Description: Not required, but highly recommended. Enter the purpose of the solicitation in this field.

Preview Date: Defaults to current date. Define the event Preview Date.

Start Date: Defaults to current date. Define the event Start Date.

Q & A End Date: Defaults to 21 days after start date. Define when the bidders' and suppliers' Q&A period closes. The Q & A End Date is normally 14 - 21 days after the bid Start Date depending on the complexity of the event.

End Date: Defaults to 21 days after start date. Define the event End date. The End Date should be between 30-45 days depending on the complexity of the event.

Click the Save Event Changes button.

Note the EventID field will change from "NEXT" and will be assigned an Event ID by the system.



Step 1: Define Event Basics Event Settings and Options

Step 1: Define Event Basics

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

* Event Settings and Options Event Comments and Attachments Payment Terms and Contact Info Event Reminder Notification

Click the Event Settings and Options link.

eate an Event				
ent Settings and Options				
Business Unit 09000	Event ID NEXT Round 1	Version 1 Event F	Format RFI	(3
	Create PDF on Event Post	Round\Version Display	Display Round and Version	
	☐ Allow Bidder XML Downloads Wate Bid Required On All Lines		Score RFI	
	 Multiple Bids Allowed Allow Edit of Posted Bids Do Not Use Best Bids on New Rounds Display Bid Factor Ideal Value 		Display Bid Factor Best/Worst	
	Allow Send NOIA Notification	*NOIA Report Template	AUC_NOIA_1	Q
			Award Only after Notice End	
Notification to be Sent	Specific Bidders 🗸	*Award Template	AUC_NOA_1	Q
	Allow Send NOA Notification			
Notification To be Sent	Only Awarded Bidders	*Non-Award Template	AUC_NONA_1	Q
 Minimum Response and Wa 	rning			
Minimum numb	er of bid response	Number of days war	ning prior	
Associated Categories ⑦				
Save Event Changes		GoTo		✓ Go
eturn to Event Overview				

The Event Settings and Options page allows the user to define details for the entire Event. Most of the fields will default in and generally should not be changed unless known to the user.

Round/Version Display: Select one of these options:

- Display Round
- Display Round and Version
- Do not Display

If applicable, select a NOIA Report Template, Award Template, and Non-Award Template.



Score RFI Event: Select to calculate a score for RFI responses. If this option is deselected, the system hides the Best, Worst, Ideal, and Weighting fields on the Bid Response page.

Display Bid Factor Best/Worst and **Display Bid Factor Ideal Value:** Select to show the best and worst values for the bid factor or the ideal value for the bid factor on the Create Bid Response page. If you deselect these options, then bidders will not be able to see the best and worst values or the ideal value for a bid factor on the Create Bid Response page.

Create PDF on Event Post: Select to create a PDF version of the sourcing event. If this option is not selected, PDF creation is suppressed.

Allow Bidder XML Downloads: Select to enable bidders to download events to an XML file. If this option is not selected, a PDF version of the sourcing event is created; however, an XML version is not created when the events are posted.

Bid Required On All Lines: Select this check box if you require bidders to bid on all lines on the event.

Multiple Bids Allowed: Indicates whether bidders (for RFx events) can post multiple bids on the same event.

Allow Edit of Posted Bids: Indicates whether bidders (for RFx events) can edit their posted bids until the event ends.

Do Not Use Best Bids on New Rounds: This setting defaults from the Sourcing Business Unit Definition page based on the business unit. However, you can change the setting at the event level here. Select to indicate that new rounds should not be created using best bids when the bids are countered. If you select this option, then bidders will not be able to accept the counter offer on the Create Bid Response page; bidders will be forced to rebid. In this scenario, bidders will still be able to either counter or withdraw the bid.

Display Bid Factor Ideal Value: Select to show the best and worst values for the bid factor or the ideal value for the bid factor on the Create Bid Response page. If you deselect these options, then bidders will not be able to see the best and worst values or the ideal value for a bid factor on the Create Bid Response page.

Allow Send NOIA Notification: Select to send a communication to the bidders that they have been identified for awarding a PO or contract

Generally, the <u>Create PDF on Event Post</u> box is unchecked and the <u>Bid Required on All Lines</u> box is checked.



Minimum Number of Bid Responses: Enter a number if a minimum number of bids is required. If the number of bidders' responses is less than the value specified in this field, then an alert will be displayed on the Procurement Operations Home Fluid pages under the My Sourcing Events tile and on the Navigation bar. If this field is left blank, no Alerts will be displayed for this event.

Click the arrow to the left of the Associated Categories heading to expand the section.

► Associated (Categories ⑦		I
Category ID	Category	Description	
	٩		+ -

Input the Category Codes to be associated with the event.

After reviewing the Event Settings and Options, click the Return to Event Overview link.



Event Comments and Attachments

Follow the same steps as a Buy event to add Event Comments and Attachments, shown on pages 22 and 23.

Payment Terms and Contact Info

Step 1: Define Ever Enter basic information, gene	It Basics eral settings and optional rules for this event.			
	* Event Settings and Options		Payment Terms a	and Contact Info
	Event Comments and Attachments		Event Reminder	Notification
Click the Payment	t Terms and Contact Info link.			
Create an Event				
Event Contact De	tails			
Event Contact ⑦				
Contact Name	Bosten Benn			
Email ID	noreply@omes.ok.gov			
Phone				
Save Event Cha	nges	GoTo	~	Go
< Return to Event Overvie	e e e e e e e e e e e e e e e e e e e			

Contact Name: This is generally the Requestor's name.

Email ID: This should hold the Email of the Event Creator. System generated emails will be sent to the address including undelivered emails to invited bidders. This email will be visible to bidders when responding electronically and allow them to send emails directly to this email address with questions, etc.

Phone: Generally, the requestor phone number. This will print at the top of the paper bid document and be visible at the top of the page when suppliers are bidding electronically.

Ensure the Contact Name, Buyer Email ID, and Phone fields are correct.

Click the Save Event Changes button.

Select the Return to Event Overview link to return to the main Event Summary page.



Event Reminder Notification

Follow the same steps as a Buy event to add Event Reminder Notifications, shown on page 28.





Step 2: Configure Event Bid Factors

Click the Event Bid Factors link.

Create an Event		
Event Bid Facto	ors	
Event ID	NEXT	Bid Factor Weighting Total 0.00000
Event Name	TST_RFI_EVENT	Remaining Bid Factor Weight 100.00000
Bid Factors ⑦		
Seq Nbr	1	
*Bid Factor	ADHOC Q	*Type Veighting 0.00000
Question	5	 Display Bid Factor? Bid Factor Response Required
	A	☐ Ideal Response Required
Best	0.000000 Worst 0.000000	UOM Q
	Comments and Attachments	
Select for deleti	on	
Add Bid Factors by 0	Group Select Bid Factors	E V Delete Selected Records
		Bid Factor Weighting Total 0.00000
		Remaining Bid Factor Weight 100.00000
Save Event (Changes	GoTo Go
< Return to Event Ove	erview	

Use the Event Bid Factors page to specify header-level bid factors that relate to the entire event.

If a specific Bid Factor question needs to be added, click the <u>plus</u> (+) button to insert a new question below that sequence. For example, if the plus button is clicked in the first sequence, a new question will be added as the second sequence. Click the minus (-) button to delete a question.

Bid Factor: Choose from a list of predefined Bid Factor templates. When adding new Bid Factors, click the lookup icon to the right of the bid factor field, and select an option. This will default in the remaining fields. Bid Factors can also be searched for by clicking the Select Bid Factors link.

Weighting: Enter a value to indicate the importance of the bid factor to the line item. The system then factors weightings into the score.

You must enter weightings for bid factors if you want the bid factor responses to be scored.



Display Bid Factor: Select to display the bid factor to the bidder. If this option is not selected, the bid factor is hidden from the bidder, and you can enter a response in the bid analysis pages.

Bid Factor Response Required: Select if the bidder must enter a response for the specified bid factor before successfully posting a bid.

Ideal Response Required: Select if the bidder's response must match the specified best or ideal response for the bid to be eligible for award. Bidders who do not match the specified best or ideal response can still post their bids, but their bids will be disqualified and will not be eligible for award.

Add Bid Factors by Group: Click this link to search for Bid Factor groups to be included.

		Se	arch Bid Fa	ctor Groups			×
Search Cr	iteria						Help
Bid Factor	r Group Code		Q				
E	Business Unit 0900	00 Q					
	Dept	Q		Reset	Searc	<u>h</u>	
Search Re	ר ר					1-1 of 1 🗸	ÞI
	Bid Factor Group C	Code	Description			Select	
1	HEADER_QUESTIC	ONS	Header Resp	onse Questions			
ок	Cancel	Refresh					

Enter the Business Unit for the Event and click the <u>Search</u> button to retrieve Bid Factor Groups associated with that Business Unit.

Click the Select checkbox, then the <u>OK</u> button to include the Bid Factor Group on the event.



ent Bid Facto	DIS						
Event ID	NEXT			Bid F	actor Weighting Total	100.00000	
Event Name	TST_RFI_EVENT				ing Bid Factor Weight		
d Factors ⑦							
							+ -
Seq Nbr	1 SALES_TAX	Q	*Type	Yes/No 🗸		100.00000	
*Bid Factor					Weighting		
Question	Do you have an Oklahoma Sales Tax Permit?			Display Bid Factor?	e Required		
				Ideal Response Req	uired		
	● Yes ○ No Add Clauses To Bid Factor						
	Add Clauses To Bid Factor Comments and Attachments						
	Add Clauses To Bid Factor Comments and Attachments on						+ -
Select for deleti	Add Clauses To Bid Factor Comments and Attachments on	٩	*Туре	Text V	Weighting	0.00000	+ -
Select for deleti	Add Clauses To Bid Factor Comments and Attachments on	Q	*Туре	Text ✔ Display Bid Factor? Bid Factor Response		0.00000	+ -
Select for deleti Seq Nbr *Bid Factor	Add Clauses To Bid Factor Comments and Attachments on 2 SALES_TAX_NUMB Please provide your sales tax permit number or statutory		*Туре	Display Bid Factor?	e Required	0.00000	+-
Select for deleti Seq Nbr *Bid Factor	Add Clauses To Bid Factor Comments and Attachments on 2 SALES_TAX_NUMB Please provide your sales tax permit number or statutory		*Туре	Display Bid Factor?	e Required	0.00000	+-
Select for deleti Seq Nbr *Bid Factor Question Ideal	Add Clauses To Bid Factor Comments and Attachments on 2 SALES_TAX_NUMB Please provide your sales tax permit number or statutory		*Type	Display Bid Factor?	e Required	0.00000	+ -

After reviewing the Event Bid Factors, click the <u>Save Event Changes</u> button.

Click the Return to Event Overview link.



Step 3: Select Bidders to Invite

Follow the same steps as a Buy event to Invite Bidders, shown in Step 3, pages 30-33.

Step 4: Post Event

Follow the same steps as a Buy event to Post the Event, shown in Step 4, page 36.



Event Approval Inquiry

Step 5: Post Event When all event creation acti		r event for scheduled external viewing and trigger any bidder invitations you may	/ have defined.
	Save Event	Save As	Template
	Post		
Related Links:			
	Document Status Inquiry	View All Attachments f Plan Task Association	
	Event Approval Inquiry	FIAIT TASK ASSOCIATION	s

After selecting the post button, the Event Approval Inquiry link will display. Click the link to view the Approval Workflow in a new tab.

Business Unit	09000 Event ID:	EV00000535	Round 1	Versio	n 1	Format RFI
Event Type	RFx			Start Date	09/25/2024	10:37AM CDT
Event Status	Pending Post Approva	al		End Date	10/16/2024	10:37AM CDT
Event Name	TST_RFI_EVENT			Entered By	BBENN06	
Description	RFI Testing Event					
riew/Edit Appro						
Sourcing App			€Sta	t New Path		
Sourcing App	val Status:Pending		€Star	t New Path		

Click the Multiple Approvers link to view the users in the workflow path.

Use the Start New Path link to insert an Ad Hoc approval level.



Review/Edit Event

Creating New Versions (Amendments)

Navigation > Menu > Sourcing > Maintain Events > Event Workbench

Create new Versions for Events when you need to make changes to a posted event. Once a new version is created, you can't delete lines or bid factors because bids to the previous version would include those lines and bid factors.

You can create and edit Versions of multi-version events. When viewing a multi-version event in the Event Workbench component, the system displays the most recent version of the event. The new version of the event must be Posted to be available for bidding.

When a new Version of an Event is created:

- The system will create a new Version of the event.
- The system Increments the Version number by one.
- The previous current Version of the event becomes read-only upon posting the new version, and additional changes to that version cannot be made.
- The user cannot add or delete line items, change bid factors, or change the start price or line quantity for a new version.
- If any scoring-related changes are required, you must create a new round.

						-				
Event Workbo	ench									
Search Criter	ia									
Business Unit	Q									
Event ID]	From Start	Date		To Start Date	iii	Sort With		~
Created By		Q	From End	Date		To End Date		Sort Order		~
Event Format	~		Cate	gory				Only show Ev	vents I created	
Event Type	~			m ID				Only show Ac	tive Events	
Event Status		~						Use my searc	h defaults	
			Descri					Search		Reset
Associated With Plan			Plan N	lame			Q	Default Search Pr	eferences	
Legend										
Search Results)						Q	 1-25 of 135 	• •	View 100
Event ID										
EV00000535	Name	Format	Туре	Unit	Status Pending Post Appr	oval	8	V 100 V		
EV00000534	TST_RFI_EVENT	RFI	RFx	09000	Open		8			
EV00000533	TST_EVENT_2	Buy	RFx	09000	Pending Post Appr	oval	8			
EV00000532	TST_EVENT_01	Buy	RFx	09000	10/14/2024 07:15			· · ·	.	
EV00000518	IronClad Testing	Buy	RFx	83000	09/27/2024 03:00				5	
 EV00000318 EV00000456 	SW0685 Flashing LE	Buy	RFx	09000	Event Completed			ਤੋ₽₽₽₽		
	Maternal Child & H	Buy	RFx	34000	Event Completed		-			
► EV00000531	Test	Buy	RFx	04000	Event Completed	1	8	3 🖩 🔍 🗋 🗋	¢≣¢	\bigtriangledown

Click the Create New Version icon, outlined above, from the Workbench.



Create New Version? (18058,8129)		
This operation will create a new version of the event. T Select 'Yes' if you wish to create a new version for this		ve version will not be inactivated until the new version has been posted se, select 'No'.
	Yes	No

The user will receive the message shown above, **click** the <u>Yes</u> button to continue with creating a new version.

Event ID EV00000533	Round		1 Ev	vent Format Buy	
pst Approval	Round		1 Ev	vent Format Buy	
IT 04		Time Zone	CDT		
IT_01		Preview Date	09/23/2024	Time 10:49AM	
ent	5	Start Date	09/23/2024	Time 10:49AM	
		Q & A End Date	10/14/2024	Time 10:49AM	
	l.	End Date	10/14/2024	Time 10:49AM	
					Go
		Copy From		~	
ith an asterisk (*) you may not save nd optional rules for this event.	your event until all re	equired fields are filled.			
tt	ttings and Options iments and Attachments der Bid Factors	ttings and Options iments and Attachments	ttings and Options ments and Attachments	ttings and Options Payment Ten ments and Attachments Event Constr	tings and Options Payment Terms and Contact Info ments and Attachments Event Constraints der Bid Factors

The **New Version of the Event** will use the same Event ID number but increase the Version count.

Event ID: This is same as the previous version.

Round: For Version changes only, the number remains the same.

Version: The Version number will be incremented by one for the new version.

Description: For new Versions, the buyer may want to indicate in this field the reason for the Amendment. This field is visible at the top of the bidder email and Event Package.

End Date: To extend the Event End Date to accommodate amendment requirements, change this field as would be done with a new Event.



event Comments and Attachments	
Event ID EV00000533	
Event ib Evolutions	
Enter Comments ⑦	I of 2 🗸 🕨 🕨 I View All
Comments:	
Lease Premium Latitude 7440 (Ultralight) Payment \$39.37 for 36 Months Quote: 300	0172482359.1
RITM0334008	
This is NOT AN ASSET All invoices shall be submitted to OMES Accounts Payable, AccountsPayable@omes.o	k any and invoice shall reference the Durahase order. It is strength
recommended that invoices shall be submitted within ninety (90) days of services/produ Unterest on late navments made by the State of Oklahoma is novemed by 62 O.S. 834.	ucts performed/delivered for prompt payment.
Send To Bidder	Standard Comments
	otanala commente
Add Attachment	
OK Cancel Refresh	
ek the Add Attachment button.	
ek the <u>Add Attachment</u> button. Select File to create as × Attachment	
Select File to create as × Attachment	
Select File to create as × Attachment	
Attachment u may attach up to 99 files to upload	

Click the <u>Choose Files</u> button and select a file to add as an attachment.

Click the <u>Upload</u> button to attach the file.

Attachments ⑦				I	 1-1 of 1 • 	ÞI
Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications		
COR134_Original.pdf					View	-
OK Cancel Refresh]					



Display to Bidder/Include On Award/Include in Notifications: These boxes should generally be checked for an Amendment to alert the Bidders and allow them to view the new attachment.

Click the <u>OK</u> button to return to the Event Summary page after all amendment file attachments are added.

Save Event Save As Template	Step 5: Post Event When all event creation activ		Ir event for scheduled external viewing and trigger any t	oidder invitations you may have defined.
Post		Save Event		Save As Template
		Post		

Save, Edit or Post the Event as would be done with a first time Event.

Click the <u>Save Event</u> button, the dialogue box below will display.

Do you want to recreate the Eve	Files? (18058,1003)
	les attachments will be removed and replaced with new files containing the latest changes to to the Bidders with the lates: attachments.
f you hit "No", the current Event	es will not be updated.
	Yes No

The system will ask if you want to send to all bidders again. Select Yes and all will be notified

NOTE: The event does not have to be reposted; the system will not provide this option. All suppliers will be notified of the amendment and the amendment document will be attached to the email.

NOTE: The new Versions will have the same invited bidders as the previous version. If those bidders have submitted a bid previously, they will need to "Confirm" that their previous bid is ok for the new version. An email will indicate this requirement to the bidder.

NOTE: New Versions should be used to make the following changes:

- Additional information that needs to be communicated to bidders (questions, etc.).
- Any Event Line changes such as Item or Quantity.
- Event Name
- Extension of Event End Date/Time
- Payment, Currency, and Buyer Information



Creating New Rounds (Counters)

Create new Rounds for RFx events to negotiate with bidders after initial bids are received. This is useful when either substantive changes to the event (requiring additional input from the bidders) are made or when you evaluate and narrow bids to a select group for further negotiation.

You can select to counter one or more bidders for the overall event or for individual lines. The system creates the new Round by copying the previous Round/Version. Countered bidders are the only invited bidders for the new round. Only countered lines are included in the new round. You can add additional bidders if necessary.

The new round is posted out to the invited bidders. The bidders receive a new invitation along with a new counter PDF version of the event. When a bidder bids on the new round, the bidder can view his or her initial bid and the countered offer.

Event Workben	nch									
 Search Criteria 										
Business Unit	09000 Q									
Event ID	EV00000499		From Start Date			To Start Date		Sort With		~
Created By		Q	From End Date			To End Date		Sort Order		~
Event Format	~		Category	,				Only show Eve		d
Event Type	~		Item ID					Only show Activ		
Event Status		~	Description					Search		Reset
Associated With	٩		Plan Name				Q	Default Search Pref	erences	
Legend										
Search Results							QI	I≪	1 🕶 🕨	View Al
	lame	Format	Туре	Unit	Status				_	
EV00000499 S	W0193-Sewer Clean	Buy	RFx	09000	Event Completed		8 🗔	i 💵 🔍 🗶 🗋	S .	\bigtriangledown

Navigation > Sourcing > Maintain Events > Event Workbench

Select the Analyze Bids icon from the Workbench. The Analyze Bids page allows the user to counter the bids to create a new Round.



Analyze Total							
Analyze Total	Analyze Line						
Business Unit:	Event ID:	Round:	Version:	Event Name:			
09000	EV00000499	1	2	SW0193-Sewer	Cleaning and Inspection Equipment		
Event Format:	Event Type:	Currency:	End Date:	Status:	Go To:		
Buy	RFx	USD	08/23/2024 3:0	Posted			~
Bid Analysis and Dis	play Options ?	USD	08/23/2024 3:0	IOPM CD1			- 1
Analysis							
	В	idder Name KEY I SUPF	EQUIPMENT & PLY CO	ESSENTIAL EQUIPMENT	VERMEER GREAT PLAINS INC	CENTRAL OKLAHOM	A ICM OF AMERICA INC
	Event Version Res	ponded To 2		2	1	2	
	В	id Number 1	ø	3 💬	1	1 🖗	1 🖗
	Total B	d Amount 1.00		1.00	1.00	1.00	100,000.00
	Tota	Bid Cost 0.00		0.00	1.00	0.00	0.00
	Total Ev	rent Score 100.0	00	100.00	100.00	100.00	99.90
	Total He	ader Cost 0.00		0.00	0.00	0.00	0.00
	Total Hea	der Score 75.00)	75.00	75.00	75.00	75.00
		Bid Action Cou	nter 🗸	NA 🗸	NA ~	NA 🗸	NA 🗸
	L			٩			
	Reje	ct Reason	Q	٩	Q	۹	٩
	Award I	by Percent					
		Hide Bid					
Factors				0	_		-
Factors							
Recalculate	Add / Edit Fa	ctors	Unhide Bids	<<	< >	>>	
Save Return to S	earch						

Bid Action: Select the bid action of 'Counter' to counter a particular bidder.

NOTE: If you want to counter all lines on an Event, you select the Counter action on the Analyze Total page (displayed) for the selected bidders. If you want to counter only selected lines from the event, select the Counter action on the Analyze Lines page for the selected lines and bidders.

Go To: select Create New Round from the Go To dropdown menu.

NOTE: All the details from the previous Round are copied into the new Round.



4.0									
ent Summary Business Unit	09000	Event ID	EV00000499	Round	I 2 Version	1	Event For	mat Buy	
Event Type	RFx		Change to A	uction					
Event Status	Open				Time Zone	CDT			
*Event Name	SW0193-Sewer C	leaning and	Inspection Equipmer	nt	Preview Date	10/01/2024	Tim	11:46AM	
Description	Purchase Sewer (Cleaning and	Inspection Equipme	nt 💵	Start Date	10/01/2024	Tim	11:46AM]
Description			and interlocal entitie		Q & A End Date	10/22/2024	Tim	11:46AM]
				1.	End Date	10/22/2024	Tim	11:46AM	
					Copy From			~	Go
uired fields reside on pa ep 1: Define Eve ar basic information, gen	nt Basics	onal rules for t		vent until a	II required fields are filled.	Payme	ent Terms and C	Contact Info	
ep 1: Define Eve	nt Basics	onal rules for the state of the	his event.	vent until a	ll required fields are filled.	Event (ent Terms and C Constraints Reminder Notif		
ep 1: Define Eve	nt Basics eral settings and option * Event Settings a Event Comments Event Header Bid	onal rules for the state of the	his event.	vent until a	ll required fields are filled.	Event (Constraints		

The new Event Round will be displayed.

Event ID: The new Round will have the same Event ID as the previous.

Round: The Round number will be incremented by 1.

Version: This new round will have Version number 1 initially.

NOTE: New Rounds can have subsequent Versions in which case the Version number can also increment from the original Version 1.

NOTE: Normal Bidder Invitation, Bids, and related actions can be taken on the new Round.



Review / Track Event

The **Event Workbench** is an area that buyers can use to manage Events through their lifecycle. The Event Workbench can be used to access Event Details, view Event Lines, create new Versions, Cancel an Event or research History of an Event.

From the Event Workbench the user can navigate to other pages to Analyze Events, Edit Events, or see Bid Response history.

Event Workb	ench									
 Search Criter 	ia									
Business Unit	Q									
Event ID			From Start Dat	e	To Start Da	ite		Sort With	h [~
Created By		۹	From End Dat	e	To End Da	Ite				~
Event Format	~		Categor	у 🗌				Sort Orde	Events I created	
Event Type	~		ltem l					Use my search		
Event Status		~	Descriptio	n 🦳				Search		Reset
Associated With Plan ▶ Legend	٩		Plan Nam	e			۹	Default Search P	Preferences	Neset
Search Results	\$					Q	N	 1-25 of 136 	•	▶ View 100
Event ID	Name	Format	Туре	Unit	Status					
EV00000535	TST RFI EVENT	RFI	RFx	09000	Pending Post Approval		8	BE 🖉		\triangleleft
EV00000534	TST_EVENT_2	Buy	RFx	09000	Open		8	BE 🗶		\bigtriangledown
▶ EV00000533	TST_EVENT_01	Buy	RFx	09000	Pending Post Approval		8 💽	BE 🗶		
► EV00000532	IronClad Testing	Buy	RFx	83000	10/14/2024 07:15 AM CDT		8 🛃	🛍 🗶 🗋	麗	
► EV00000518	SW0685 Flashing LE	Buy	RFx	09000	09/27/2024 03:00 PM CDT		8 💽	🛤 🗶 🗋	E ,	
► EV00000456	Maternal Child & H	Buy	RFx	34000	Event Completed		8	💷 🔍 🗶 🗋	5	
EV00000531	Test	Buy	RFx	34000	Event Completed		8	🖩 🔍 🖉 🗋	E ,	

Navigation > Menu > Sourcing > Maintain Events > Event Workbench

Use this page to:

- Search and sort events.
- View event details by clicking the Event ID link.
- Display details of the line items for an event by clicking the arrow at the left of the event row.

Use the Search Criteria section of the page to retrieve only desired Events.

- Created By: Use this field to display only those Event created by a particular User.
- Event Format/Type: Display only those Events that are of a particular format or type.
- Event Status: Select only Events in a particular event status.
- **Category/Item ID:** Display only those Events with Event Lines containing a particular purchasing Category or Item.



Only show Events I created: Select this checkbox to view only Events created by the user.

Only show Active Events: Select this checkbox to view only Events in an active status.

Click the Default Search Preferences link.

Event Workbench	Search Preferences f	or Bosten Benn				
Search Defaults Business Unit	09000 Q					
Event ID Contains		From Start Date =	09/25/2024	Sort With =	End Date	~
Event Format =	Buy 🗸	To Start Date =		Sort Order =	Ascending	~
Event Status =	~	From End Date =		_		
Event Type =	RFx ~	To End Date =		Only show Events	s I created	
Save						
Return to Event Workbench	ו					

Use the **Search Preferences** page to set default search criteria that will be used each time the user enters the Workbench.

Sort With: Select how the Events will be sorted.

Sort Order: Select the order in which the Events will be sorted based on the 'Sort With' field.

Only Show Events I Created: Select this checkbox to view only those Events created by the User each time the Workbench is used.

Click the <u>Save</u> button to store the Search Default values.

Click the Return to Event Workbench link.

Click the <u>Search</u> button to retrieve Events matching the Search Criteria.



Event ID	Name	Format	Туре	Unit	Status				
EV00000533	TST_EVENT_01	Buy	RFx	09000	Pending Post Approval	8 🛃	80	<u>//</u>	\triangleleft
	TST_EVENT_2	Buy	RFx	09000	Open	<u>×</u> _		2	\triangleleft
EV00000535	TST_RFI_EVENT	RFI	RFx	09000	Pending Post Approval	8			\Box

What do the other icons on the	Event ID Line represent?	
3		
Cancel Event Approval Status		
Event History Analyze Bids		
<u>e</u>		S.
Edit Event (Not used at this time.)	Create New Version (Re-bid)	View Bid History

Use the Cancel Event icon to cancel the event.

Cancel E	Event for:			Bosten Ben	n						
Event Inf	ormation										
Business (09000	Unit	Event ID EV00000533	Event N TST_EV		Round 1	Version 1	Format Buy	Status Pending Post	Approval	Bids Received No	
Line Inform									I	 I-1 of 1 ✓ 	
Line	Category	Item II	D	Item Description	ı		Quantity	UOM	Extend	ed Price	
1	43211600			FY24 Dell Latitud	e 7440		1	EA			39.3

To confirm the Event Cancelation, **click** the <u>Cancel Event</u> button. The user will be prompted to verify the cancellation, click the <u>Yes</u> button to confirm.

Click the Return to Event Workbench link to stop the Event Cancelation.



	Event ID	Name	Format	Туре	Unit	Status				
	EV00000533	TST_EVENT_01	Buy	RFx	09000	Pending Post Approval	8	y	<u>//</u>	\triangleleft
	EV00000534	TST_EVENT_2	Buy	RFx	09000	Open	8	80	2	\triangleleft
	EV0000535	TST_RFI_EVENT	RFI	RFx	09000	Pending Post Approval	8			

A displayed Approval Status icon indicates the event is pending approval. Once posted, this icon will disappear.

Click the Approval Status icon to review the Approval.

Business Unit	00000 E	Event ID:	EV00000535	Round 1	Versio	n 1	Format RF
Dusiness Onit	09000			Round	Versio		Format Ref
Event Type	RFx				Start Date	09/25/2024	4 10:37AM CDT
Event Status	Pending	Post Approval			End Date	10/16/2024	4 10:37AM CDT
Event Name	TST_RFI	_EVENT			Entered By	BBENN06	
Description	RFI Testi	ng Event					
view/Edit Appro							
Sourcing App		:Pending		€Start	New Path		
Sourcing App	oroval val Status	:Pending		● Start	New Path		

Click the Multiple Approvers link to view users in the Approval Workflow level.

Click the Return to Event Workbench link.



۴L	.egend										
Se	earch Results	3					QI		1-25 of 136	~	View 100
	Event ID	Name	Format	Туре	Unit	Status					
	EV00000535	TST_RFI_EVENT	RFI	RFx	09000	Pending Post Approval		8 🛃 🛙	e 🖉		\bigtriangledown
•	EV00000534	TST_EVENT_2	Buy	RFx	09000	Open		8	n 🖉		\bigtriangledown
Þ	EV00000533	TST EVENT 01	Buy	RFx	09000	Pending Post Approval		🛛 🛃 🛯	e 🖉		\bigtriangledown
►	EV00000532	IronClad Testing	Buy	RFx	83000	10/14/2024 07:15 AM CDT		8 🛃 🛛	D 🖉 🗋	E ,	\mathbf{i}
Þ	EV00000518	SW0685 Flashing LE	Buy	RFx	09000	09/27/2024 03:00 PM CDT		8 🛃 🛛	p 🗶 🗋		
⊧	EV00000456	Maternal Child & H	Buy	RFx	34000	Event Completed		8 🛃 🛙	u 🔍 🗶 🗋	S .	
Þ	EV00000531	Test	Buy	RFx	04000	Event Completed		🛛 🗟	u 🔍 🗶 🗅	S,	

Use the **Event History** icon to view history for an Event.

Event Histo	ry					
Event Informa	tion					
Bus. Unit	Event ID	Event Name	Format	Туре	Stat	us
04000	EV00000531	Test	Buy	RFx	Pos	sted
Version Histor	y					
₽ Q					1-1 of 1 🗸	View All
Round	Version	Event Status	Modified B	у		
1		1 Posted	OFS config	User	Q	
Event Stage			'			
***	And the second s	S	(P)	<u></u>	9¢	
Create Event	Event Approval	Dispatch Event		Analyze Bids	Award Event	

The **Event History** page shows the history of the Event as it has progressed through the Event Lifecycle.

Version History: This section of the page shows the 'Round' and 'Version' history for an Event.

Use the lookup icon to navigate directly to a particular Round or Version of the Event.

Event Stage: This section of the page allows the user to navigate directly to the Event, Bid Responses, or Award Transaction (Purchase Order or Contract).



L	egend										
Se	arch Results	i i					QI		1-25 of 136	~	View 100
	Event ID	Name	Format	Туре	Unit	Status					
	EV0000535	TST RFI EVENT	RFI	RFx	09000	Pending Post Approval		😣 🛃 💷	Ø		\triangleleft
▶	EV0000534	TST EVENT 2	Buy	RFx	09000	Open		8	<u>//</u>		\bigtriangledown
Þ.	EV0000533	TST EVENT 01	Buy	RFx	09000	Pending Post Approval		😣 🛃 🛤	2		\Box
•	EV0000532	IronClad Testing	Buy	RFx	83000	10/14/2024 07:15 AM CDT		🛛 🛃 💷	2 🗋	S.	\bigtriangledown
•	EV00000518	SW0685 Flashing LE	Buy	RFx	09000	09/27/2024 03:00 PM CDT		8 🛃 🛤	1	5	\bigtriangledown
⊧	EV/0000456	Maternal Child & H	Buy	RFx	34000	Event Completed		🛛 🛃 💷	Q 🗶 🗋	S .	
Þ.	EV00000531	Test	Buy	RFx	04000	Event Completed		🛛 🛃 🛤	R 🗶 🗅	5	

Use the Analyze Bids icon to transfer to the Analyze Bids pages to evaluate and award an Event.

NOTE: The Analyze Bids page allows the user to view bid responses, bid questions, comments, etc. The Event is awarded from these pages as well.

Analyze Total									
Analyze Total	Analyze Line								
Business Unit:	Event ID:	Round:	Version:		Event Name:				
04000	EV00000531	1	1		Test				
Event Format:	Event Type:	Currency:	End Date:		Status:	Go	To:		. II.
Buy Bid Analysis and	RFx Display Options ⑦	USD	09/19/2024 2:	27PM CDT	Posted				~
Analysis									
	Event Version Re	Bidder Name JON	ES PUBLIC ATIONS INC	PRINCI	PAL TECHNOLOGIES INC				
	Event version Re	1 sponded to		1					
		Bid Number 1	Þ	1					
		Bid Amount 800.		1,000.0	00				- 6
		tal Bid Cost 0.00		0.00					- 81
		Event Score 100.		99.75					- 81
		leader Cost 0.00		0.00					- 81
	Total H	eader Score 0.00		0.00					- 81
		Bid Action NA	~	NA	~				
	Re	ject Reason	Q		Q				- 81
	Award	by Percent							- 82
		Hide Bid 🗌							- 12
Recalculate	Add / Edit F	actors	Unhide Bids		<<	<	>	>>	1 H.
									* K.
Save Return	to Search								- 82
						_		· · · · · · · · · · · · · · · · · · ·	



۴L	.egend											
Se	earch Results	3					QI			1-25 of 136	• •	I View 100
	Event ID	Name	Format	Туре	Unit	Status						
	EV00000535	TST_RFI_EVENT	RFI	RFx	09000	Pending Post Approval		8	y 11	<u>//</u>		\triangleleft
•	EV0000534	TST EVENT 2	Buy	RFx	09000	Open		8	00	<u>//</u>		\bigtriangledown
Þ	EV0000533	TST EVENT 01	Buy	RFx	09000	Pending Post Approval		8	y 🟨	Ø		\triangleleft
Þ	EV0000532	IronClad Testing	Buy	RFx	83000	10/14/2024 07:15 AM CDT		8	·	1	E ,	\bigtriangledown
▶	EV00000518	SW0685 Flashing LE	Buy	RFx	09000	09/27/2024 03:00 PM CDT		8	y 00	1	S .	
▶	EV00000456	Maternal Child & H	Buy	RFx	34000	Event Completed		8	y 🐽	Q 🗶 🗋	S .	
Þ	EV00000531	Test	Buy	RFx	04000	Event Completed		8	y 🐽	Q 🗶 🗋	s,	

The Create New Version icon is used to rebid an event.

NOTE: In the situation that the event needs to be changed, the Create New Version icon should be used instead of the Edit Event icon. This will open a new version in the current round and will allow the user to make changes and repost the updated Event.

View Bid History icon: Utilize this icon to view the event stages.

Event Bid Histor	ry					
Event ID	Event Name	Round	Version	Event Type	End Date	Status
04000-EV00000531	Test	1	1	RFx	09/19/24 2:27PM CDT	Posted
Report Type						
Event Invitation	Best Bids	O Bidder/Bid	\bigcirc List By Line	⊖ Charts		
Refresh						
Event Participation	n Activity					
Total Event Invitat	tions: ⁵⁹ Ac	cepted Invitations: 2		Declined Invitations:	0	No Response: 57
Return to Event Workb	ench					

The Event Bid History page displays Event bid history and related reporting.

Report Type: Define the type of display that will be visible at the bottom of the page.

Event Participation Activity: Displays the number of invited bidders and bidders who have accepted, declined, or not responded.

Use the **<u>Refresh</u>** button to retrieve new results based on selection criteria.

Click the Best Bids radio button.



Event Bid History							
Event ID E	Event Name		Round Ve	rsion Event Type	End Date	Status	
04000-EV00000531 Te	est		1 1	RFx	09/19/24 2:27P	M CDT Posted	
Report Type							
\bigcirc Event Invitation	Bes	t Bids OBidder/Bi	d O List I	By Line O Chart	s		
Refresh Bids					14		
Bidder Name	Bid ID	Date Time Posted	Score	Rank	Bid Status	Price	
JONES PUBLIC RELATIONS INC	1	09/19/24 8:18:13AM	100.00		Winning	800.00 USD	
PRINCIPAL TECHNOLOGIES INC	1	09/18/24 1:10:36PM	99.75	2	Outbid	1,000.00 USD	
Return to Event Workber	nch						

The **Best Bids** option shows the bid results by Price and Score.

The List by Line option shows each bid response by Event Line.

Click Return to Event Workbench link.



Discussion Forum (Q&A)

Navigation > Sourcing > Maintain Events > Discussion Forums

Discussion Fo	rums						
Forum User Preferen	ices						
Forums							
E			M	▲ 1-1 of	f1 🗸		View All
Discussion Forums	5	Description		Read Only	y Pos	sts	
Event QA		Event Q&A Forum		No			1405
Event Q&A orums Search Forum		Search					
lessage Threads					- 1		
Aessage Threads		I	1-20 of 311	► ► ∨	iew 100		
E Q	Author	Date Posted		Vi 🕨 🕨 Vi	iew 100		
野 Q Subject	Author Susan Smith		Posts		iew 100		
野 Q Subject 80500 EV00000163 Rnd:1 Ver:1		Date Posted	Posts 1	Q & A Report			
Imp Q Subject 80500 EV00000163 Rnd:1 Ver:1 26500 EV00000165 Rnd:1 Ver:1 1	Susan Smith	Date Posted 03/02/23 3:51:04.000000PM CST 03/07/23	Posts 1	Q & A Report			
Aessage Threads Implement Subject 80500 EV00000163 Rnd:1 Ver:1 26500 EV00000165 Rnd:1 Ver:1 09000 EV00000166 Rnd:1 Ver:1 09000 EV00000168 Rnd:1 Ver:1	Susan Smith Kimberly R Coulter	Date Posted 03/02/23 3:51:04.000000PM CST 03/07/23 03/07/23 1:36:17.000000PM 03/07/23 1:36:17.000000PM	Posts 1	Q & A Report Q & A Report Q & A Report			

Use the Event Discussion page to view an event message and post a reply.

CDT

CDT

26500 EV00000173 Rnd:1 Ver:1

10500 EV00000174 Rnd:1 Ver:1

13100 EV00000178 Rnd:1 Ver:1 Richard Diaz

Melisha Marie Platt

Richard Diaz

03/13/23 1:50:26.000000PM

03/14/23 2:09:53.000000PM

03/15/23 3:31:11.000000PM CDT

Enter the Event Number in the Search Forum field and **click** the <u>Search</u> button to narrow search results.

1 Q & A Report

1 Q & A Report

1 Q & A Report



Q&A Report

Click the Q & A Report link to access the Discussion Forum Report.

		Discussion Forum Report		H
₽ ₽			I III III III III IIII IIII	View All
Event ID	Email	Message	Date Time	Include
1 EV00000190	blampkins@imagenet.com	What volumes are to be utilized in Pricing Option C?	04/17/23 1:52:38.00000PM	
	ions Print All Questions	Return		

Select the **Include** checkbox for lines you want to print and click the **<u>Print Selected Questions</u>** button.

The system will download the Discussion Forum Report in Word format which you may Save.

	Discussion Fe	orum Report	
Date Of Issuance:	4/3/2023	Solicitation No.	EV00000190
ISSUED FROM:			
Cristy Diane Newton Contracting Officer	Phone Number	noreply@ Email Ad	omes.ok.gov dress
Questions/Answers			
Q 1. What volum A 1.	nes are to be utilized in Pricing Option	1C?	

After the Discussion Forum Report has been reviewed and the questions have been answered, the user will post the Q&A as an amendment, page 60, or attach it as a response to the question, shown on the next pages.



Responding to Bidder Questions

Click a linked event in the Subject column to access the discussion forum for that event.

Event Q&A	
Forums	Event QA Message List
Event Forum T	pic
😂 09000 EV0000	I90 Rnd:1 Ver:1 Cristy Diane Newton 04/03/2023 12:26 PM

Click an event forum topic link to view an event message. This is also where you may find any attachments a bidder may have included.

	Event Discussion	>
		Help
&Message		
Author	Cristy Diane Newton	
Datetime:	04/03/2023 12:26 PM	
Email	cristy.newton@omes.ok.gov	
Subject	09000 EV00000190 Rnd:1 Ver:1	
Message	This message thread is the dedicated forum for submitting questions for Event EV00000190) .
Re	ply	
Return to	Message Thread	

After viewing the message, click the <u>**Reply**</u> button to post a message to the event forum for this topic.



Groupbox	
Author	Bosten Benn
Datetime:	09/25/2024 03:11 PM
Email	noreply@omes.ok.gov
Subject	RE: 09000 EV00000190 Rnd:1 Ver:1
Message	Test Reply
	Add Attachment
Sub	omit
Return to	Message Thread

Private Message: Select to mark the message private so that only you and the person to whom you are replying can see the message. This option is available only for event creators. Bidders can send only private messages, and replies to bidders are also private only.

The user can add an attachment to their reply by clicking the Add Attachment link and selecting a file from device.

Click the <u>Submit</u> button to submit the response to the forum.

Once the reply has been submitted, **click** the Return to Message Thread link.



Analyze and Award Bid Responses Analyze Bid Responses

Bid Analysis is the process of viewing supplier responses, analyzing, and awarding the Event. Award can be done to Purchase Order or Contract.

Navigation: Sourcing > Maintain Events > Event Workbench

Event Workbe	ench									
 Search Criteri 	a									
Business Unit	09000 Q									
Event ID	EV00000276		From Start Date		Ē	To Start Date		Sort With		~
Created By		Q	From End Date			To End Date		Sort Order		~
Event Format	~		Category					Only show Ev Only show Act		I
Event Type	~		Item ID					Use my search		
Event Status	Pending Award	~	Description					Search		Reset
Associated With Plan ▶ Legend	Q		Plan Name				Q	Default Search Pro	eferences]
Search Results							QI		of 1 🗸 🕨	▶ View All
Event ID EV00000276		ormat iuy		Unit 09000	Status Pending Award		8 🗔	# <u>@</u> <u>/</u> D	ē,	<mark>😵 🏳 </mark>

Select the Analyze Bids icon from the Workbench.



Analyze Total malyze Total Analyze Line tusiness Unit: Event ID: Round: Version: Event Name: 9000 EV0000276 1 1 Supplemental RFP-SW1048-Surveillance Equipment&ser vent Format: Event Type: Currency: End Date: Status: Go To: tuy RFx USD 09/05/2023 3:00PM CDT Pending Award * Bid Analysis and Display Options O Sort Bids By Total Event Score Sort Order Descending Analyze Ibisplay Options View Factor Responses Display Delta Responses Display Disqualified Bids Display Withdrawn Bidders Analyzis Matysis All Bid Actions Award Counter Disallow Reject <no action=""></no>
Analysis Unit: Event ID: Round: Version: Event Name: 9000 EV0000276 1 1 Supplemental RFP-SW1048-Surveillance Equipment&Ser 9000 EV0000276 1 1 Pending Award 9000 EV0000276 Pending Award 90005/2023 3:00PM CD 9005/2023 2:00PM CD
9000 EV0000276 1 1 Supplemental RFP-SW1048-Surveillance Equipment&ser vent Format: Event Type: Currency: End Date: Status: Go To: huy RFx USD 09/05/2023 3:00PM CDT Pending Award
Vent Format: Event Type: Currency: End Date: Status: Go To: Ity RFx USD 09/05/2023 3:00PM CDT Pending Award
Instruction Instruction Instruction Instruction Pending Award Instruction Instruction <thinstruction< th=""> <thinstruction< th=""></thinstruction<></thinstruction<>
USD 09/05/2023 3:00PM CDT Ending Award Image: Constraint of the second se
Bid Analysis and Display Options () Interface Analysis Header Weighting Sort Bids By Total Event Score Sort Order Descending Analyze Display Options View Factor Responses Display Delta Responses Display Disqualified Bids Image: Comparison of C
Display Options View Factor Responses Display Delta Responses Display Display Display Display Display Display Withdrawn Bidders //ew Bid Actions Image: Comparison of the provided state of the provided stat
Display Options View Factor Responses Display Delta Responses Display Disqualified Bids Display Withdrawn Bidders Fiew Bid Actions Award Counter Disallow Reject No Action> Analysis Bidder Name JOHNSON CONTROLS ENDEX OF OKLAHOMA JE SYSTEMS INC TECHSICO ENTERPRISE SECURITY LLC
Display Options Internation to be an example of the second of the s
Analysis Bidder Name JOHNSON CONTROLS ENDEX OF OKLAHOMA JE SYSTEMS INC TECHSICO SUMMIT FIRE & ENTERPRISE SECURITY LLC
Bidder Name JOHNSON CONTROLS ENDEX OF OKLAHOMA JE SYSTEMS INC TECHSICO SUMMIT FIRE & SECURITY LLC
Bidder Name JOHNSON CONTROLS ENDEX OF OKLAHOMA JE SYSTEMS INC TECHSICO SUMMIT FIRE & SECURITY LLC
Bidder Name JOHNSON CONTROLS ENDEX OF OKLAHOMA ENTERPRISE SECURITY LLC
US HOLDINGS LLC INC SOLUTIONS LLC
Event Version Responded To 1 1 1 1 1 1 1 1 1 1 1
Bid Number 1 1 1 3 1 2
Total Bid Amount 7.0 6.00 6.00 6.00 6.00
Total Bid Cost 7.0 6.00 6.00 6.00 6.00
Total Event Score 10.00 90.00 90.00 90.00 90.00
Total Header Cost 0.00 0.00 0.00 0.00 0.00
Total Header Score 80.00 80.00 80.00 80.00 80.00
Bid Action NA V NA V NA V NA V
Reject Reason
Award by Percent
Hide Bid
Factors
Recalculate Add / Edit Factors Unhide Bids < >>
Save Return to Search Previous in List Next in List

Use the **Analyze Events** – **Total** page to view each suppliers bid response and award the entire event to a single supplier or award multiple suppliers by percentage.

The Bid Analysis and Display Options section initially appears collapsed. Click the arrow to the left of the section to expand.

Sort Bids By: Sort the supplier bids by Score, Amount, or Name.

Sort Order: Use this option to view results in ascending or descending order.

View Bid Actions: Determine which types of Bid Responses to view.

Total Bid Amount: This field displays the sum of all Event Line response amounts.

NOTE: The user may Disallow, Reject, or Counter the Bid. A Counter action will initiate a new Round for the Event.



Factors Section: This section initially appears collapsed. **Click** the arrow to the left of the **Factors** section heading to expand and view supplier Event Header responses to Bid Factor questions.

▼ Factors						
Weighting UOM Ideal						
Do you Have an Oklahoma Sales Tax Permit	Y	Y	Υ	Y	Y	
Please provide your sales tax permit number	or statutory exemption	1889730560	188301312	Sales account ID: S	790077440	
Are you registered with the Oklahoma Secret	tary of State?	Y	Y	Y	Y	
What is your Oklahoma Secretary of State Fi provides specific details supporting the exem			ill be required to register with th	e Secretary of State or	must attach a signed state	ement that
10.00000	3400663743	1900527126	2312020640	3513014623	3712781155	
Do you carry Workers Compensation Insurar Act_YES - Include a certificate of insurance v 10.00000 Y						
Have you read and agreed to the attached N	Ion-Collusion Certification stateme	ent (DCS-FORM-CP-004)?				
10.00000 Y Do you acknowledge receipt of the solicitatio	Y amendment? By clicking yes b	Y	Y F	Y	Protect Y	
0.00000 Y						
Recalculate Add / E	Edit Factors Unit	nide Bids	<< <	>	>>	

Click the Comments Icon to view comments and attachments associated with that particular bid response.

		Help	
		1	
		- 1	
1-1 of 1 🗸	• • •	- 1	
n		- 1	
		- 1	
	n		n

Click the View icon, outlined above, to open the attachment in a new tab.

After reviewing the comments and attachments, **click** the **<u>Return</u>** button.



Analyze Total								
Analyze Total	Analyze Line							
Business Unit:	Event ID:	Round:	Version:	Event Name:				
09000	EV00000276	1	1	Supplemental F	RFP-SW1048-Surv	eillance Equipment&se	ŧ٢	
Event Format:	Event Type:	Currency:	End Date:	Status:		Go To:		_
Buy	RFx	USD	00/05/2022 2:005	Pending Award				~
 Bid Analysis and Disp 	lay Options 💿	030	09/05/2023 3:00F	FWICDI				
Header Weighting	g	Sort Bids By	Total Event Score	e 🗸	Sort Order Des	scending 🗸	Analyze	
Display Option:	s View Factor Respon	ses	Display Del	Ita Responses	Display D	qualified Bids	🛛 Display Withdra	wn Bidders
View Bid Actions	All Bid Actions		Counter	Disallow	C Reject	No Action>		
New Did Actions			_ oountor	Distance				
Analysis								
					JE SYSTEMS	INC	FECHSICO	SUMMIT FIRE &
	Bio	ider Name JOHNS US HO		ENDEX OF OKLAHOMA INC			ENTERPRISE SOLUTIONS LLC	SECURITY LLC
	Event Version Resp			1	1			1
		d Number 1	P	1 💬	3		P	2 💬
		Amount 7.00		6.00	6.00		5.00	6.00
		Bid Cost 7.00		6.00	6.00		5.00	6.00
		ent Score 100.00		90.00	90.00		90.00	90.00
		ader Cost 0.00		0.00	0.00		0.00	0.00
		ler Score 80.00		80.00	80.00		30.00	80.00
		Bid Action NA	~	NA 🗸	NA	~	NA 🗸	NA 🗸
				Q				
	Rejec	t Reason	Q	4		۹	Q	٩
	Award b	y Percent						
		Hide Bid 🗆						
				_	0			_
Factors								
Recalculate	Add / Edit Fac	tors	Unhide Bids	<<	<	>	>>	
Save Return to Sea	arch Previous in Lis	st Next in Lis	t					-

Use the arrow buttons in the bottom right of the page to view additional bid responses.

Click the Bidder Name link to access the supplier information.

		Help
Supplier ID 0000508489 Short Name JOHNSON CO-018		
Name JOHNSON CONTROLS US HOLDINGS LLC	1 Q	
Location 0003 Address	3 Q	
Details		
Name SCOTT SIMPSON Prefix		
Title Fire Sales Manager Phone ^^		
Country USA United States Ext		
Address 1 JOHNSON CONTROLS FIRE PROTECTION LP		
Address 2 DEPT CH 10320 Prefix		
Address 3 Fax		
Address 4		
City PALATINE		
County Postal 60055-0320		
State IL		
URLID http:// View Internet Addre	SS	
Email ID noreply@omes.ok.gov		
OK Cancel		

Click the <u>OK</u> button to return to the Analyze Total page.



Click the Comment Icon in the Analysis section, outlined on the previous page, to review comments and attachments for the associated bid.

Event Comr	nents and Attachments			
Business Unit 09000 Event ID EV00000276 Comments JCI will submit the OMES IT Security Certification as soon as it is complete. Per email from Cini on 9-1-23, we can provide it to her as soon as JCI Corporate has completed filling it out. Please advise if the State needs any other information from JCI Fire Protection. Respectfully,				F
		K (1-11 of 11 🗸 🕨 🕨	
Attached File	Attachment Description	Event RFx Doc		
EV00000276-OMESFormCP076_Signed.pdf			e	
EV00000276_RESPONSE_Exhibit_1.docx			ß	
BID_Cover_Letter.doc			[¢	
Johnson_Controls_Exhibit_2Price_Template.xlsx			٦	
Sample_COI_4.6.2023.pdf			C.	
EV00000276-OMESFormCP004_Signed.pdf			[¢	

Click the <u>View</u> icon to open the attachment in a new tab.

NOTE: This page displays comments and attachments that apply to the entire event.

After reviewing the comments and attachments, **click** the <u>**Return**</u> button.

Click the Analyze Line link to award by the Line.



Analyze Line

	e Total ss Unit:	Analyze Line Event ID: EV00000276	Round: 1		Version: 1			t Name: plemental RFP-SW	/1048-Surveillance	Equipment&ser		
Event F Buy	Format:	Event Type: RFx	Currency: USD		End Date: 09/05/2023	3:00PM CD	Statu T Pen	is: ding Award		Go To:	~	
ine Iter	ms 🕐											
₽\$	Q									M	 I-7 of 7 ✓ 	View All
Line	Item ID	Description			Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	I	Video Surveillance& Sec	urity Detection	P.	46171621	EA	0.01000	1.0000	0.0000	10.00000	Open 🖌	Analyze
2	2	Access Control Systems		Pł.	46171619	EA	0.01000	1.0000	0.0000	10.00000	Open 🗸	Analyze
3	3	Mass Notification		ħ	46191505	EA	0.01000	1.0000	0.0000	10.00000	Open 🗸	Analyze
4	1	Burglar Alarms		ħ	72151703	EA	0.01000	1.0000	0.0000	10.00000	Open 🗸	Analyze
5	5	Surveillance Services an	d Equipment	P	46171600	EA	0.01000	1.0000	0.0000	10.00000	Open 🗸	Analyze
6	3	Portable Fire Extinguishe	ers	P	46191608	EA	0.01000	1.0000	0.0000	10.00000	Open 🗸	Analyze
7	7	Inspection & Monitoring-I Systems, Fire Sprinkler S Monitoring, Fire Alarm/Pr Systems	Systems, Alarm	R	92121701	EA	0.01000	1.0000	0.0000	40.00000	Open 🗸	Analyze

Click the Analyze link to view the Analyze Line page for the associated line item.



Analyze Line					
Business Unit: Event ID: 09000 EV000002 Event Format: Event Type:	Round: Version 2761 1 Currency: End Dat	Supp	Name: Iemental RFP-SW1048-Surveillar S:	nce Equipment&ser	
Buy RFx	USD 09/05/2	2023 3:00PM CDT Pend	ling Award		
Line 1	Requested Quantity	1.0000 UC	M EA	Start Price	
Item ID		deo Surveillance& Security D	etection	Weighting 10	.00000 Previous Line Next Line
 Bid Analysis and Display Opti 	ions				
Analyze Qty	1.0000	Sort Bids By	ne Score 🗸 🗸	Sort Order Descending	✓ Analyze
Display Options Vie	ew Factor Responses	✓ Display Del	Ita Responses 🛛 🗆 Disp	olay Disqualified Bids 🛛 🛛 🛛	Display Withdrawn Bidders
View Bid Actions	II Bid Actions	Award Co	unter 🗆 Disallow	Reject C <no< td=""><td>Action></td></no<>	Action>
Analysis					
Bidder Na	me US TECHNOLOGIES INC	SOLUTIONS LLC	TRANS-TEL CENTRAL LLC	TECHSICO ENTERPRISE SOLUTIONS LLC	SUMMIT FIRE & SECURITY LLC
Event Versio	on 1 🕞	1	1	1	1
Bid Numb	ier 1	1	2	1	2 (5)
	ity 1.0000	1.0000	1.0000	1.0000	1.0000
Minimum Bid Quanti Total Bid Amou	-	0.0000	0.0000 1.00	0.0000	0.0000
Total Bid Co		1.00 1.00	1.00	1.00 1.00	1.00
Total Line Sco	re 100.0000	100.0000	100.0000	100.0000	100.0000
Bid Actio	n 🗸	~	✓	~	
Deitert Dessen Cod					
Reject Reason Cod		٩	٩	٩	<u> </u>
Award by Percer	nt				
Awar					
Quantit	ide 🗆	0	0		0
	Bid				
Factors					
					Go To Line
Recalculate Un	nhide Bids		<< <	> >>	✓ V
OK Cancel Appl	ly				

Use the Analyze Line page to analyze and award events by Line.

Sort Bids By – sort the supplier bids by Score, Amount or Name.

Sort Order – use this option to view results in ascending or descending order.

View Bid Actions – determine which types of Bid Responses to view.

Total Bid Amount – this field displays the sum of all Event Line response amounts.

NOTE: The user may Disallow, Reject or Counter the Bid. A Counter action will initiate a new Round for the Event.



Factors Section – This section initially appears collapsed. **Click** the arrow to the left of the **Factors** section heading to expand and view supplier Event Header responses to Bid Factor questions.

▼ Factors				
Add/Edit Bid Factors				
Weighting UOM Ideal				
What price are bidding? 100.00000 0 1.00	1.00	1.00	1.00	1.00
Recalculate Unhide Bids				Go To Line
Unite Bus				
Analyze Line				
Type: Buy RFx USD 09/0	Date: Suppler Status: 15/2023 3:00PM CDT Pending	mental RFP-SW1048-Surveillar g Award		
Line 1 Requested Quan	A second second second	EA	Start Price Weighting	0.01000 0.00000 Previous Line Next Line
Item ID Item Description: Very Bid Analysis and Display Options	Video Surveillance& Security Det	ection	weighung	Previous Line Next Line
Analyze Qty 1.0000	Sort Bids By Line	Score 🗸	Sort Order Descending	Analyze
	Display Delta	Responses Disp		Display Withdrawn Bidders
Display Options View Factor Responses View Bid Actions III Bid Actions	Award Coun			Action>
Analysis Bidder Name US TECHNOLOGIES Event Version 1 Bid Number 1 Bid Quantity 1.0000 Minimum Bid Quantity 0.0000 Total Bid Amount 1.00 Total Bid Cost 1.00 Total Line Score 100.0000 Bid Action Reject Reason Code Q Award by Percent	INC TURN-KEY SECURITY SOLUTIONS LLC 1 © 1.0000 0.0000 1.00 100.0000 • • • •	TRANS-TEL CENTRAL LLC 1 2 ③ 1.0000 0.0000 1.00 1.00 1.00 100.0000 ✓ Q	TECHSICO ENTERPRISE SOLUTIONS LLC 1 1 0.0000 1.00 1.00 100.0000 ••••••••••	SUMMIT FIRE & SECURITY LLC 1 2 1 1.0000 0.0000 1.00 1.00 1.00 1.0
Award				
Quantity		0		
Hide Bid	U		0	<u> </u>
Factors				
ractors				
Recalculate Unhide Bids		ee e	> >>	Go To Line 🗸
OK Cancel Apply				

When multiple supplier bid responses exist, use the arrow buttons in the bottom right of the page to view additional bid responses.

Click the Comment Icon in the Analysis section to review comments and attachments for the associated bid.



Response Line Comr	nents/Attachments ×
Business Unit 09000 Event ID EV00000276 Line 1 Comments	Help
Comments:	国
Attachments	
Attached File	Attachment Description
Exhibit_2Price_Video_Surveillance.xlsx	
Return	

Click the <u>View</u> icon, outlined above, to open the attachment in a new tab.

NOTE: This page displays comments and attachments that apply to the line only.

After reviewing the comments and attachments, **click** the **<u>Return</u>** button.

To return to the Analyze Total page, click the <u>Cancel</u> button, then the Analyze Total link.



Awarding Bid Responses: Award to Supplier

Analyze Total								
Analyze Total	Analyze Line							
Business Unit:	Event ID:	Round:	Version:	Event Name:				
09000	EV0000276	1	1	Supplementa	I RFP-SW1048-Surv	eillance Equipment&	ser	
Event Format:	Event Type:	Currency:	End Date:	Status:		Go To:		
Buy	RFx	1100	00/05/2022 2:00	Pending Awa	rd			~
 Bid Analysis and Displ 	ay Options ⑦	USD	09/05/2023 3:0					
Header Weighting		Sort Bids By	Total Event Sco	ore 🗸	Sort Order De	scending 🗸	Analyze	
Display Options	View Factor Respon	ises 🗸	Display D	elta Responses	Display Display Display Display	qualified Bids	Display Withdra	wn Bidders
View Bid Actions	All Bid Actions	Award	Counter	Disallow	Reject	<no action=""></no>		
Analysis								
					JE SYSTEMS	INC	TECHSICO	SUMMIT FIRE &
	BI	dder Name JOHNS US HOL	DINGS LLC	ENDEX OF OKLAHOM	A		ENTERPRISE SOLUTIONS LLC	SECURITY LLC
	Event Version Res			1	1		1	1
		d Number 1	P	1	3		1 (2)	2 💬
		d Amount 7.00		6.00	6.00		6.00	6.00
		Bid Cost 7.00		6.00	6.00		6.00	6.00
		ent Score 100.00		90.00	90.00		90.00	90.00
		ader Cost 0.00		0.00	0.00		0.00	0.00
		der Score 80.00		80.00	80.00		80.00	80.00
	Total field	uel 300le 80.00		80.00	80.00		00.00	80.00
		Bid Action Award	~	NA 🗸	NA	~	NA 🗸	NA 🗸
		Awaru	•					
	Reje	ct Reason	۹	Q		Q	۹	Q
	Award b	y Percent	100					
	, that a	Hide Bid 🗆						
					U			
Factors								
Recalculate	Add / Edit Fa	ctors	Unhide Bids	<<	<	>	>>	ך
			_					_
Save Return to Sea	rch Previous in L	ist Next in List						

After reviewing the bid responses and the decision to award one or more of the suppliers has been made, **select** the <u>Award</u> option in the **Bid Action** field for that bid response.

NOTE: You can award the event to a single bidder or distribute the award across multiple bidders. For awarding an event to multiple bidders, distribute Award by Percentage across the available suppliers, with the total Award Percentage sum of 100.

Enter the award percentage and **click** the <u>Save</u> button.

Once the bid has been evaluated and a recommendation for award has been made, navigate to the **Analyze Events** page:

Select the <u>Award Events</u> option from the Go To dropdown menu.



Award Option 1: Award to Supplier

)etails										
vard Deta		Award Summary		v Constraints							
usiness U	Jnit:	Event ID:	Round:	Version:	Event Name:						
9000 vent Form	nat:	EV00000276 Event Type:	1 Currency:	1 End Date:	Supplement Status: Status:	al RFP-SW	1048-Surveillance Go 1	e Equipment&ser To:			
цу		RFx			Pending Av	vard			~		
Show A	ward Details	to Biddore	USD	09/05/2023 3:00PM CDT							
		Display	all bids	Display bid scores	🗆 Disp	lay bid's to	tal bid price	🗆 Displ	ay factors		
ward De	tails ⑦										1 of 1 🗸 🕨 🕨
	Bidder Nar	me JOHNSON CONT	ROLS US HOLDI	NGS LLC	der Type Supplier			Buyer CZA	CHARIA	Q	
<u>Г</u>	Award Typ	(Currency Event	~	SD	Terms 45	Q	-	
	*Contract Sty	le Purchase Order	٩		ness Unit 09000 Q		00	ionita 10			
L		L									
	Award Numbe	er 1		To	al Award	7.00	00				
vard Line	es										
≣ Q]								€ 1-7	of 7 🗸	View All
ine	Item ID	Supp/Item Rel	Item Descripti	on	Group ID	UOM	Award Quantity	Awarded Price	Extended Price		
1			Video Surveilla	nce& Security Detection		EA	1.0000	1.0000	1.0000		ß
2			Access Control	I Systems		EA	1.0000	1.0000	1.0000		Ø
3			Mass Notificatio	on		EA	1.0000	1.0000	1.0000		ß
4			Burglar Alarms			EA	1.0000	1.0000	1.0000		ß
			Surveillance Se	ervices and Equipment		EA	1.0000	1.0000	1.0000		ß
5							1.0000	1.0000	1.0000		Ø
5			Portable Fire E	xtinguishers		EA	1.0000		1.0000	time :	
			Portable Fire E	xtinguishers		EA	1.0000		1.0000		
6			Inspection & Monitoring-Fire	Extinguishing Systems,							
			Inspection & Monitoring-Fire Fire Sprinkler S	Extinguishing Systems,		EA	1.0000	1.0000	1.0000		ø
6			Inspection & Monitoring-Fire Fire Sprinkler S	e Extinguishing Systems, Systems, Alarm							I
6			Inspection & Monitoring-Fire Fire Sprinkler S	e Extinguishing Systems, Systems, Alarm							I
6			Inspection & Monitoring-Fire Fire Sprinkler S	e Extinguishing Systems, Systems, Alarm					1.0000		θ

Award Type: Select the type of award to be used: Purchase Order, or Procurement Contract.

Contract Style: When the award type is Procurement Contract, select Purchase Order.

NOTE: Generally, the award type will be Procurement Contract, and the Contract Style will be Purchase Order, unless otherwise known.

Bidder Type: If the bidder is a registered supplier with the state, this field will show "Supplier". If the field shows "Bidder", user must check if the Bidder has a Supplier ID or reach out to Supplier Registration for the bidder to be assigned a Supplier ID.

PO Business Unit: Enter the Business Unit where the Purchase Order will be created after the event is awarded.

Click the **Post Award** button to award the event to selected supplier(s).



Notice of Ir	ntent to A	Award is	not sent for	this eve	ent. (18058,869	92)		
Do you wis	h to con	tinue?						
		Yes		No				
ick the <u>Yes</u>	button t	to award	l the event.					
Award Details								
Award Details	Award Summary		w Constraints	Fund N				
Award Details Business Unit: 09000	Award Summary Event ID: EV00000276 Event Type:	Revie Round: 1 Currency:	w Constraints Version: 1 End Date:	Event N Status:	Supplemental RFP-SW1048-Su	irveillance Equipment& Go To:	ser	
Award Details Business Unit: 09000 Event Format:	Event ID: EV00000276	Round: 1	Version: 1 End Date:	Status:	Supplemental RFP-SW1048-Su		ser	~
Award Details Business Unit: 09000 Event Format: Buy	Event ID: EV00000276 Event Type: RFx	Round: 1 Currency:	Version: 1	Status:	Supplemental RFP-SW1048-Su Status:	Go To:	ser	~
Award Details Business Unit: 09000 Event Format: Buy	Event ID: EV00000276 Event Type: RFx	Round: 1 Currency: USD	Version: 1 End Date:	Status: DT	Supplemental RFP-SW1048-Su Status:	Go To:	Ser Display factors	•
Award Details Business Unit: 09000 Event Format: Buy Show Award Details Display bids	Event ID: EV00000276 Event Type: RFx s to Bidders	Round: 1 Currency: USD	Version: 1 End Date: 09/05/2023 3:00PM CI	Status: DT	Supplemental RFP-SW1048-Su Status: Awarded	Go To:		▼ 4 4 1of1 ~ ▶ ▶
Award Details Business Unit: 06000 Event Format: Buy Show Award Details Display bids Award Details ⑦	Event ID: EV00000276 Event Type: RFx s to Bidders	Round: 1 Currency: USD y all bids	Version: 1 End Date: 09/05/2023 3:00PM CC Display bid so	Status: DT	Supplemental RFP-SW1048-Su Status: Awarded Display bid's total bid p	Go To:		
Award Details ⑦	Event ID: EV0000276 Event Type: RFx s to Bidders Displa	Round: 1 Currency: USD y all bids	Version: 1 End Date: 09/05/2023 3:00PM Ct Display bid so NNGS LLC	Status: DT cores	Supplemental RFP-SW1048-Su Status: Awarded Display bid's total bid p	Go To:	Display factors	

7.0000

Notice the Event Status changed to Awarded.

Contract ID 000000000000000000007518

1

Award Number

Click the Contract ID link to open the contract created from the award. After making any necessary changes, approve, save, and dispatch the contract.

Total Award



Contract Entry		
Contract		
SetID	00000 Contract Version	
Contract ID	00000000000000000000000000000000000000	Status Current
*Status	Open Approval Due Date	
Administrator/Buyer ▼ Header ⑦	CZACHARIA Q Cini Zacharia (090)	Add a Document
*Contract Style	Purchase Order Q	
Process Option		
*Supplier		Edit Comments Contract Activities
*Supplier ID	0000508489 Q JOHNSON CONTROLS US HOLDINGS LLC	Primary Contact Info Contract Header Agreement
Primary Contact		Contract Releases Custom Fields
Supplier Contract Ref		Activity Log
Description	Supplemental RFP-SW1048-Survei	Document Status Thresholds & Notifications
Master Contract ID	٩	Price Adjustment Template
*Begin Date	09/26/2024	Purchase Order BU Defaults
Expire Date		
Renewal Date		Statewide Contract
Control Type	Currence	
	Tax Exempt Tax Exempt ID Rate Date	e 09/26/2024 CRRNT Q
	Auto Default Lock Chartfields	Must Use Contract Rate Date Allow Multicurrency PO



Awarding Bid Responses: Award to Bidder with Supplier ID

Once the user has identified the bidder has an existing Supplier ID, they can award the event by selecting the bidder and entering the Supplier ID. The Buyer will run the Public query **FEI_Check** to verify the Bidder's TIN matches the Supplier's TIN and if they do, the user can choose the bidder.

The steps to run the query, then award the event are shown below:

Navigation>Reporting Tools>Query>Query Viewer

Query Vie	ewer								
Enter any information you have and click Search. Leave fields blank for a list of all values.									
	*Search By	Query Name 🗸	begins with	FEI_Check					
	Search	Advanced Search							

Input the Query Name, **FEI_Check**, and click the **Search** button.

Query									
■ Q							14	1-1 of 1 ∨	View All
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
FEI_CHECK		Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

The Query results section allows the user to Run the Query to HTML, Excel, or XML. This example shows running to HTML.

Click the HTML hyperlink.

FEI_CHECK	
ID Num 541321839]
View Results	

The user will input the Bidder's TIN number and **click** the <u>Search</u> button to retrieve the Supplier TIN number to ensure it matches and can view the Supplier ID. The example below displays the results for the Bidder selected on the next page.

FEI_CHECK	t				
ID Num 54132 View Results	1839				
Download res					
View All					First 1-1 of 1 Last
Row	SetID	Supplier		Supplier	ID Num
1	00000	0000250468	COMPUTER SOLUTION COMPANY OF VIRGINIA IN		541321839



Award Option 2: Award to Bidder with Supplier ID

Analyze Total				_					
Business Unit: 34200 Event Format: Buy	Analyze Line Event ID: EV00000247 Event Type: RFx	Round: 1 Currency: USD	Version: 1 End Date: 08/14/2023 3:00	PM CDT	Event Name: Case Manageme Status: Pending Award	ent Software	Go To:		>
 Bid Analysis and Displ Analysis 	ay Options ⑦								
	Event Version Resp Bid Total Bid Total I Total Eve Total Hea		20.00	1	© 0.00	COMPUTER SOL COMPANY OF VI 1 521,450.00 521,450.00 98.54 0.00 0.00		HOOVER BLANKET 1 1 777,051.00 777,051.00 96.80 0.00 0.00 0.00	NC HOOVER BLANKET INC 1 2 777,051.00 777,051.00 96.80 0.00 0.00
Factors		Bid Action NA t Reason / Percent / Hide Bid]	v	NA	~ Q	Award	٩	NA • Q •	NA ~ Q
Recalculate Save Return to Sea	Add / Edit Fact	tors	Unhide Bids		<<	<	>	>>	

After reviewing the bid responses and the decision to award one or more of the suppliers has been made, **select** the **Award** option in the **<u>Bid Action</u>** field for that bid response.

NOTE: You can award the event to a single bidder or distribute the award across multiple bidders. For awarding an event to multiple bidders, distribute Award by Percentage across the available suppliers, with the total Award Percentage sum of 100.

Enter the award percentage and **click** the <u>Save</u> button.

Once the bid has been evaluated and a recommendation for award has been made, navigate to the **Analyze Events** page:

Select the <u>Award Events</u> option from the Go To dropdown menu.



Award Details									_	
Award Details	Award Summary	Review	v Constraints							
Business Unit:	Event ID:	Round:	Version:	Event Name:						
34200	EV00000247	1	1	Case Ma	nagement So	oftware				
Event Format:	Event Type:	Currency:	End Date:	Status: Status:		Go	To:			
Buy	RFx	USD	08/14/2023 3:00PM CDT	Pending	Award			~]	
 Show Award Detai 	ls to Bidders									
Display bids	Display	all bids	Display bid scores	Di	splay bid's t	otal bid price	Disp	lay factors		
Award Details ⑦									(a a	1 of 1 🗸 🕨 🕨
*Contract Si Award Numi	Purchase Order	٩		al Award	ع 52,145.0	0000	Supplier ID 00	00250468 Q		
щ Q								I∢	f1 🗸	View All
Line Item ID	Supp/Item Rel	Item Descripti	on	Group ID	UOM	Award Quantity	Awarded Price	Extended Price		
1		Case Managen	nent System (CMS)		EA	0.1000	521,450.000	52,145.0000		ß
								Post Award		
Save Return to S	Search Notify									
							_		_	

Input the PO Business Unit and Supplier ID for the associated Bidder.

Award Type: Select the type of award to be used: Purchase Order, or Procurement Contract.

Contract Style: When the award type is Procurement Contract, select Purchase Order.

NOTE: Generally, the award type will be Procurement Contract, and the Contract Style will be Purchase Order, unless otherwise known.

Bidder Type: If the bidder is a registered supplier with the state, this field will show "Supplier". If the field shows "Bidder", but the user has confirmed that they have a Supplier ID, they can still award to this bidder. Otherwise, the user must reach out to Supplier Registration to have a Supplier ID assigned to the Bidder.

PO Business Unit: Enter the Business Unit where the Purchase Order will be created after the event is awarded.

Supplier ID: When awarding to a Bidder that has a Supplier ID, input the Supplier ID found on the **FEI_CHECK** query.

Click the **Post Award** button to award the event to selected supplier(s).



Notice of Intent to Award is not sent for this event. (18058,8692)							
Do you wish to continue?							
	Yes	No					

Click the <u>Yes</u> button to award the event.

NOTE: This will change the status to Awarded and the user can access the Procurement Contract in the same manner as when awarding to a Supplier (Page 90).

NOTE: If the user does not enter the Supplier ID, they will receive the following message:

Automatic Supplier creation is not allowed. A Supplier ID must be entered for this bidder.								
	ОК							

The user must either enter the Supplier ID if available or contact Supplier Registration if the Bidder has not previously been established as a Supplier.

NOTE: If the Bidder does not have an existing Supplier ID, the user must reach out to supplier registration via the service desk to have a help desk ticket created for the bidder to be converted.

