State of Oklahoma COR251

Strategic Sourcing Manual

Office of Management & Enterprise Services

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Table of Contents

Document History

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

Process Flows

A flowchart beginning with "Create Solicitation Event" leading to "Define Event Basics" → "Configure Line Items" → "Select Bidders to Invite" → "Post Event" → "Event Available to Bidders" → "Bids Received and Event Closed". Below "Define Event Basics" is "Add Attachments, Bid Factors, Payment Terms, Contact Info, etc." Below "Configure Line Items" is "Add Line and Default Information." Below "Post Event" is "Event Approved or Modified." Below "Event Available to Bidders" is "Event Posted to eSupplier Portal." "Bids Received and Event Closed" leads down to the decision "Bids Reviewed," which leads to "Bids Evaluated and Recommendation for Award Made" and down to "Event Awarded," then to "Purchase Order Process Started from the Award."

Create the Solicitation Event
Creating a Buy Event from a Requisition

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

Create Events

| Find an Existing Value | **Add a New Value** |

*Business Unit 09000

*Event ID NEXT

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 Buy format is selected.

Click the **Add** button to enter the Event Details page.

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Define Event Summary

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. 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.

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 Copy From dropdown and select the **Requisition** option.

Click the **Go** button to the right of the Copy From field.

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 **Search** button.

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 Select All link option.

Click the **OK** 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

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 Display and Must Beat Start Price 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 **Advanced Definition Tab** to access Bid Factors and attach documents or line comments to the Event Lines.

Advanced Definition Tab

Use the **Advanced Definition Tab** 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.

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.

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.

From the **Advanced Definition** page, select the comments icon on the right side of the line.

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.

Click the **Choose Files** button, then select a file to insert.

Click the **Upload** button to attach the selected file.

NOTE: The **View** button will open a new window to display the attachment.

Click the **OK** 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 **Copy From** field. The same steps will be executed shown on pages 10-16 for creating the event by copying from a Contract or Purchase Order.

Create an Event
Event Summary

Business Unit	09000	Event ID NEXT	Round 1	Version 1	Event Format Buy

Event Type RFx   Change to Auction   Time Zone CST

Event Status Open

*Event Name TST_EVENT_01   Preview Date 09/23/2024   Time 8:52AM

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   Go

Copy From [ ]

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

Create an Event
Enter Copy Criteria

Copy Template

Copy From   Purchase Order

Select Criteria

Business Unit   09000

*Copy Method   Append

Copy Criteria

Purchase Order		Contract SetID		Contract ID	
Buyer		Supplier SetID		Supplier ID	
SetID		Item ID			
Category					

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 **Search** button.

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 **Search** button.

Step 1: Define Event Basics

Event Settings and Options

Click the Event Settings and Options link.

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 **Create PDF on Event Post** box is unchecked and the **Bid Required on All Lines** 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.

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

Click the Event Comments and Attachments link.

Create an Event
Event Comments and Attachments

Event ID   NEXT

Enter Comments ⓘ |◀ ◀   1 of 2 ▾   ▶   ▶| | View All

Comments:

Lease Premium Latitude 7440 (Ultralight) | Payment $39.37 for 36 Months | Quote: 3000172482359.1

RITM0334008

This is NOT AN ASSET
All invoices shall be submitted to OMES Accounts Payable, AccountsPayable@omes.ok.gov, and invoice shall reference the Purchase order. It is strongly recommended that invoices shall be submitted within ninety (90) days of services/products performed/delivered for prompt payment.
Interest on late payments made by the State of Oklahoma is governed by 62 O.S. §34.71 and 62 O.S. §34.72.

☑ Send To Bidder   ☐ Include On Award   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.
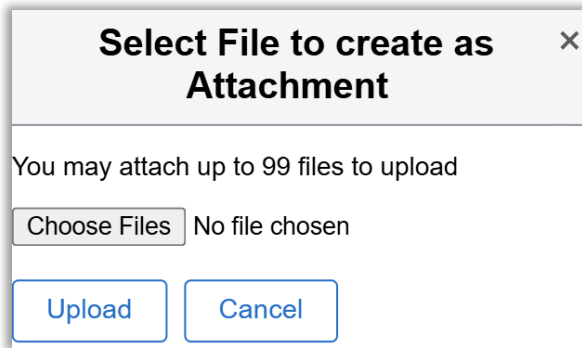
Send to Bidder: Select to enable the bidder to see the comment.

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 **Add Attachment** button to insert an attachment.

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Click the **Choose Files** button and select a file to add as an attachment.

Click the **Upload** button to attach the file.

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 **Include in Notifications** 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 **OK** button to return to the Event Summary page after all comments and file attachments are added. It is highly recommended to click the **Save Event Changes** button after attaching any documents.

Event Header Bid Factors

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

Click the Event Header Bid Factors link.

Modify an Event
Event Bid Factors

Event ID   EV00000533
Event Name   TST_EVENT_01

Bid Factor Weighting Total   100.00000
Remaining Bid Factor Weight   0.00000

Bid Factors ⑦

Seq Nbr   1
*Bid Factor   SALES_TAX

Type   Yes/No
☑ Display Bid Factor?
☑ Bid Factor Response Required
☐ Ideal Response Required
☐ Include on Contract

Weighting   100.00000

Question   Do you have an Oklahoma Sales Tax Permit?

Yes\No
◉ Yes   ○ No

Add Clauses To Bid Factor
☐ Select for deletion

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 on this page.</u> 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 **plus** (+) 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.

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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 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

Click the Payment Terms and Contact Info link.

Create an Event
Event Contact Details

Payment & Currency Information ⑦

*Currency USD 🔍   Exchange Rate

Pay Method ⌄

Payment Terms 🔍

Bill Addrs 09000 🔍

Buyer BBENN06 🔍

*Rate Type CRRNT 🔍

Rate Date 09/23/2024 📅

☐ Allow bids in other currencies

☐ Tax Exempt

Exempt ID _____

Event Contact ⑦

Contact Name Bosten Benn

Email ID noreply@omes.ok.gov

Phone _____

Save Event Changes

GoTo ⌄ Go

< Return to Event Overview

Refresh   Add   Update/Display

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

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.

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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 **Save Event Changes** button.

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

Event Reminder Notification

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

Click the Event Reminder Notification link.

Create an Event
Event Reminder Notification

| Business Unit | 09000 | Event ID | NEXT | Round | 1 | Version | 1 | Event Format | Buy | Event Type | RFx |

☑ Allow Event Reminder Notification

Event Reminder Notification Options

1-1 of 1 ⌄   View All

Sequence	*Day(s) Prior to Event End Date	Notification Date	*Audience	*Message Priority		
1	3	10/11/2024	All	High	+	−

Notification to Event Creator [1] Day(s) Prior to Event End Date

< Return to Event Overview

GoTo [⌄] [Go]

[Refresh]

[Add] [Update/Display]

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.

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Step 2: Configure Line Items

Click the Line Items link.

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 **Save Event Changes** 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, designate it as a public event, or both.

* Bidder Invitations

Click the Bidder Invitations link.

Create an Event

Invite Bidders

| Business Unit | 09000 | Event ID | EV00000533 | Round | 1 | Version | 1 | Event Format | Buy | Event Type | RFx |

☑ Public Event

Bidder Invitation List ?

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 as Group

| Save Event Changes | | Upload Contacts from file | | GoTo | [▾] | Go |

< Return to Event Overview

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.

The **Search** button retrieves all Suppliers that match the Search Criteria defined in the top of the page.

The **Recommend Bidders** 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 **Search** button then click the **Recommend Bidders** button.

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 **Return to Invite Bidders** button.

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.

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 **plus** icon and entering Bidder contact information.

Click the **OK** button to return to the Invite Bidders page.

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

Document Status Inquiry

Related Links:

Document Status Inquiry   View All Attachments for Event
                                                            Plan Task Associations

From the Event Overview page, click the Document Status Inquiry link.

Sourcing Document Status Inquiry

Business Unit	Event ID	Round	Version	Created By
09000	EV00000533	1	1	Bosten Benn
Event Status	**Start Date**	**Event Amount**		**Currency**
Open	09/23/24 10:49AM CDT	39.37000		USD

Requisitions(1) · Sourcing Events · Procurement Contracts · Purchase Orders · Service Work Orders · Receipts · Returns · Vouchers · Payments

Show All

Associated Document

1-1 of 1 | View All

| Documents | Related Info |

Actions	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			📄

Return to Search

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.

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

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 **Save Event** 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 limited to the changes that you can make to the event. Click OK to continue or Cancel if you are not done making changes to the event.

| OK | 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.

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Event Approval Inquiry

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

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

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 Buy format is selected.

Click the **Add** 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

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

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

     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 [   ] [Go]   Filtered View [All Lines and Groups]

Line Items ⓘ

	Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting		
☐	1	[🔍]	[ ]	📄	[🔍]	[🔍]	[ ]	[ ]	0.00000	[+]	[−]

Event Total: 0.0000 USD   Line Weighting Total: 0 %   Remaining Weight: 100%
Group Selected Lines [   ] [OK]

< Return to Event Overview   GoTo [   ] [Go]

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 **Display and Must Beat Start Price** is selected. If an item is selected, the system uses the item's standard unit price as a default.

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.

Copy From [▼] [Go]   Filtered View [All Lines and Groups   ▼]

Line Items ⑦

[Basic Definition] [Advanced Definition]   ◁ ◁ 1-1 of 1 ▼ ▷ ▷▷ | View All

	Line	Item ID	Description		Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting		
☐	1	1000000004 🔍	INK CART:BRO Item # LC31C-BRT, Cyan Ink cartridge for Brother PPF 1920C Multifunction Machine	📄	44103105	EA 🔍	1	13.0000		0.00000	+.	—

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

Group Selected Lines [▼] [OK]

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

Use the **Advanced Definition Tab** 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.

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.

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.

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 **Advanced Definition** page, page 42, select the comments icon on the right side of the line.

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.

Click the **Choose Files** button, then select a file to insert.

Click the **Upload** button to attach the selected file.

NOTE: The **View** button will open a new window to display the attachment.

Click the **OK** button to return to the Event Lines page after all comments and file attachments are added.

After inputting line item information and reviewing the advanced definition tab, **click** the **Save Event Changes** 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.

Event Summary

Business Unit 09000   Event ID EV00000534   Round 1   Version 1   Event Format Buy

Event Type RFx   Change to Auction
Event Status Open
*Event Name TST_EVENT_2
Description Testing Event 2

Time Zone CDT
Preview Date 09/24/2024   Time 3:33PM
Start Date 09/24/2024   Time 3:33PM
Q & A End Date 10/15/2024   Time 3:33PM
End Date 10/15/2024   Time 3:33PM
Copy From   Go

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

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

* Event Settings and Options
Event Comments and Attachments
Event Header Bid Factors

Payment Terms and Contact Info
Event Constraints

Event Reminder Notification

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

* Line Items

Item Line Defaults

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

* Bidder Invitations

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

Event Collaborators

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

Related Links:

Document Status Inquiry

View All Attachments for Event
Plan Task Associations

Last Updated By: Bosten Benn   09/24/2024 04:15 PM PDT

Return to Search   Refresh

Add   Update/Display

Step 3: Select Bidders to Invite

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.

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Creating an RFI Event

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

Create Events

| Find an Existing Value | Add a New Value |

*Business Unit 09000

*Event ID NEXT

Event Round 1
Event Version 1
*Event Format RFI

*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, 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 **Add** button to enter the Event Details page.

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Define Event Summary

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   Payment Terms and Contact Info
Event Comments and Attachments

Event Reminder Notification

Click the Event Settings and Options link.

Create an Event
Event Settings and Options

Business Unit 09000   Event ID NEXT   Round 1   Version 1   Event Format RFI

☐ Create PDF on Event Post   Round\Version Display   Display Round and Version

☐ Allow Bidder XML Downloads   ☑ Score RFI
☑ Bid Required On All Lines   ☐ Display Bid Factor Weightings

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

☑ Allow Send NOIA Notification   *NOIA Report Template   AUC_NOIA_1

                                              ☐ Award Only after Notice End

Notification to be Sent   Specific Bidders   *Award Template   AUC_NOA_1

☑ Allow Send NOA Notification

Notification To be Sent   Only Awarded Bidders *Non-Award Template   AUC_NONA_1

▼ **Minimum Response and Warning**

Minimum number of bid response [   ]   Number of days warning prior [   ]

▶ **Associated Categories** ⑦

Save Event Changes   GoTo [   ] Go

< Return 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 **Create PDF on Event Post** box is unchecked and the **Bid Required on All Lines** 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.

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

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

Click the Payment Terms and Contact Info link.

Create an Event
Event Contact Details

Event Contact ⓘ

Contact Name	Bosten Benn
Email ID	noreply@omes.ok.gov
Phone	

Save Event Changes   GoTo [▾]   Go

< Return to Event Overview

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.

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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

Step 2: Configure Event Bid Factors
Create line listings for this event.

* Event Bid Factors

Click the Event Bid Factors link.

Create an Event
Event Bid Factors

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   🔍   *Type [▾]   Weighting 0.00000

Question [   ] ☑ Display Bid Factor?
☑ Bid Factor Response Required

☐ Ideal Response Required

Best 0.000000   Worst 0.000000   UOM 🔍

Comments and Attachments

☐ Select for deletion

Add Bid Factors by Group   Select Bid Factors   [Delete Selected Records]

Bid Factor Weighting Total   0.00000
Remaining Bid Factor Weight   100.00000

[Save Event Changes]   GoTo [▾] [Go]

< Return to Event Overview

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 **plus** (+) 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.

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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.

Enter the Business Unit for the Event and click the **Search** button to retrieve Bid Factor Groups associated with that Business Unit.

Click the **Select** checkbox, then the **OK** button to include the Bid Factor Group on the event.

Create an Event
Event Bid Factors

Event ID	NEXT		Bid Factor Weighting Total	100.00000
Event Name	TST_RFI_EVENT		Remaining Bid Factor Weight	0.00000

Bid Factors ⓘ

Seq Nbr 1
*Bid Factor SALES_TAX
*Type Yes/No   Weighting 100.00000

Question Do you have an Oklahoma Sales Tax Permit?

☑ Display Bid Factor?
☑ Bid Factor Response Required
☐ Ideal Response Required

Yes\No
◉ Yes   ○ No

Add Clauses To Bid Factor
Comments and Attachments
☐ Select for deletion

Seq Nbr 2
*Bid Factor SALES_TAX_NUMB
*Type Text   Weighting 0.00000

Question Please provide your sales tax permit number or statutory exemption

☑ Display Bid Factor?
☑ Bid Factor Response Required
☐ Ideal Response Required

Ideal

Add Clauses To Bid Factor
Comments and Attachments
☐ Select for deletion

After reviewing the Event Bid Factors, **click** the **Save Event Changes** 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

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

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.

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. The current active version will not be inactivated until the new version has been posted. Select 'Yes' if you wish to create a new version for this event. Otherwise, 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.

Modify an Event
Event Summary

Business Unit	09000	Event ID	EV00000533	Round	1	Version	1	Event Format	Buy

Event Type RFx

Event Status Pending Post Approval

Event Name TST_EVENT_01

Description Testing Event

Time Zone CDT

Preview Date 09/23/2024 Time 10:49AM

Start Date 09/23/2024 Time 10:49AM

Q & A End Date 10/14/2024 Time 10:49AM

End Date 10/14/2024 Time 10:49AM

Copy From ____ Go

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

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

* Event Settings and Options
Event Comments and Attachments
Event Header Bid Factors

Payment Terms and Contact Info
Event Constraints

Event Reminder Notification

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.

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Under **Step 1: Define Event Basics**, select **Event Comments and Attachments**.

Click the **Add Attachment** button.

Click the **Choose Files** button and select a file to add as an attachment.

Click the **Upload** button to attach the file.

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 **OK** button to return to the Event Summary page after all amendment file attachments are added.

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	

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

Click the **Save Event** button, the dialogue box below will display.

Do you want to recreate the Event Files? (18058,1003)

If you hit "Yes", the current Event Files attachments will be removed and replaced with new files containing the latest changes to the event. An email will also be sent to the Bidders with the latest attachments.

If you hit "No", the current Event Files 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.

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.

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.

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.

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 for Bosten Benn

Search Defaults
Business Unit   `09000` 🔍

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 I created

Save

Return to Event Workbench

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	Type	Unit	Status						
▸ EV00000533	TST_EVENT_01	Buy	RFx	09000	Pending Post Approval	⊗	☑	📖	✏	📢 ✉
▸ EV00000534	TST_EVENT_2	Buy	RFx	09000	Open	⊗		📖	✏	📢 ✉
EV00000535	TST_RFI_EVENT	RFI	RFx	09000	Pending Post Approval	⊗	☑	📖	✏	📢 ✉

What do the other icons on the Event ID Line represent?

Cancel Event	Approval Status

Event History	Analyze Bids

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 Event for: **Bosten Benn**

Event Information

Business Unit	Event ID	Event Name	Round	Version	Format	Status	Bids Received
09000	EV00000533	TST_EVENT_01	1	1	Buy	Pending Post Approval	No

Line Information

1-1 of 1

Line	Category	Item ID	Item Description	Quantity	UOM	Extended Price
1	43211600		FY24 Dell Latitude 7440	1	EA	39.37

Cancel Event

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

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

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Event ID	Name	Format	Type	Unit	Status						
EV00000533	TST_EVENT_01	Buy	RFx	09000	Pending Post Approval	✕	☑	📖	✎	📣	✉
EV00000534	TST_EVENT_2	Buy	RFx	09000	Open	✕		📖	✎	📣	✉
EV00000535	TST_RFI_EVENT	RFI	RFx	09000	Pending Post Approval	✕	☑	📖	✎	📣	✉

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.

Approval Status

Business Unit	09000	Event ID:	EV00000535	Round	1	Version	1	Format	RFI

Event Type	RFx	Start Date	09/25/2024 10:37AM CDT
Event Status	Pending Post Approval	End Date	10/16/2024 10:37AM CDT
Event Name	TST_RFI_EVENT	Entered By	BBENN06
Description	RFI Testing Event		

▼ **Review/Edit Approvers**

Sourcing Approval

Approval Status:Pending 　　　　　　　　　　　　➕Start New Path

Sourcing Approval

Pending
🕐 Multiple Approvers
　　Branch Manager 　　➕

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

Click the Return to Event Workbench link.

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Use the **<u>Event History</u>** icon to view history for an 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).

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.

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.

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 **Refresh** button to retrieve new results based on selection criteria.

Click the **Best Bids** radio button.

Event Bid History

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   ○ Bidder/Bid   ○ List By Line   ○ Charts

[Refresh]

Bids

1-2 of 2

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	1	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 Workbench

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 Forums

Forum User Preferences

Forums

Discussion Forums	Description	Read Only	Posts
Event QA	Event Q&A Forum	No	1405

Click the Event QA link.

Event Q&A

Forums

Search Forum [   ]   [Search]

Message Threads

1-20 of 311   View 100

Subject	Author	Date Posted	Posts	Q & A Report
80500 EV00000163 Rnd:1 Ver:1	Susan Smith	03/02/23 3:51:04.000000PM CST	1	Q & A Report
26500 EV00000165 Rnd:1 Ver:1	Kimberly R Coulter	03/07/23 10:51:19.000000AM CST	1	Q & A Report
09000 EV00000166 Rnd:1 Ver:1	Marc Brown (090)	03/07/23 1:36:17.000000PM CST	3	Q & A Report
09000 EV00000168 Rnd:1 Ver:1	Cristy Diane Newton	03/08/23 5:12:38.000000PM CST	2	Q & A Report
62800 EV00000169 Rnd:1 Ver:1	Melisha Marie Platt	03/09/23 2:58:14.000000PM CST	1	Q & A Report
26500 EV00000173 Rnd:1 Ver:1	Melisha Marie Platt	03/13/23 1:50:26.000000PM CDT	1	Q & A Report
10500 EV00000174 Rnd:1 Ver:1	Richard Diaz	03/14/23 2:09:53.000000PM CDT	1	Q & A Report
13100 EV00000178 Rnd:1 Ver:1	Richard Diaz	03/15/23 3:31:11.000000PM CDT	1	Q & A Report

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

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

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Q&A Report

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

	Discussion Forum Report				✕
					Help

	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 1:52:38.000000PM	☐

Print Selected Questions	Print All Questions	Return

1-1 of 1 ⌄   View All

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

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

Discussion Forum Report

Date Of Issuance: _4/3/2023_   **Solicitation No.** _EV00000190_

ISSUED FROM:

Cristy Diane Newton   noreply@omes.ok.gov

Contracting Officer   Phone Number   Email Address

Questions/Answers

Q 1.   What volumes are to be utilized in Pricing Option C?
A 1.

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.

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Responding to Bidder Questions

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

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.

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

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 **Submit** 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

Select the Analyze Bids icon from the Workbench.

Analyze Total

Analyze Total	Analyze Line					
Business Unit:	Event ID:	Round:	Version:		Event Name:	
09000	EV00000276	1	1		Supplemental RFP-SW1048-Surveillance Equipment&ser	
Event Format:	Event Type:	Currency:	End Date:		Status:	Go To:
Buy	RFx	USD	09/05/2023 3:00PM CDT		Pending Award	[... ▼]

▼ **Bid Analysis and Display Options** ⓘ

| Header Weighting [ ] | Sort Bids By [Total Event Score ▼] | Sort Order [Descending ▼] | [Analyze] |

Display Options [View Factor Responses ▼]   ☐ Display Delta Responses   ☐ Display Disqualified Bids   ☑ Display Withdrawn Bidders

View Bid Actions   ☑ All Bid Actions   ☐ Award   ☐ Counter   ☐ Disallow   ☐ Reject   ☐ <No Action>

Analysis

	JOHNSON CONTROLS US HOLDINGS LLC	ENDEX OF OKLAHOMA INC	JE SYSTEMS INC	TECHSICO ENTERPRISE SOLUTIONS LLC	SUMMIT FIRE & SECURITY LLC
Bidder Name					1
Event Version Responded To	1	1	1	1	
Bid Number	1 💬	1 💬	3	1 💬	2 💬
Total Bid Amount	7.00	6.00	6.00	6.00	6.00
Total Bid Cost	7.00	6.00	6.00	6.00	6.00
Total Event Score	100.00	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 ▼]	[NA ▼]	[NA ▼]	[NA ▼]	[NA ▼]
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.

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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.

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

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

After reviewing the comments and attachments, **click** the **Return** button.

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.

Click the **OK** button to return to the Analyze Total page.

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

Click the **View** 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 **Return** button.

Click the Analyze Line link to award by the Line.

Analyze Line

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

Analyze Line

Business Unit: 09000
Event ID: EV000002761
Round:
Version: 1
Event Name: Supplemental RFP-SW1048-Surveillance Equipment&ser

Event Format: Buy
Event Type: RFx
Currency: USD
End Date: 09/05/2023 3:00PM CDT
Status: Pending Award

Line 1
Requested Quantity 1.0000
UOM EA
Start Price 0.01000
Weighting 10.0000

Item ID
Item Description: Video Surveillance& Security Detection
Previous Line | Next Line

▼ Bid Analysis and Display Options

Analyze Qty 1.0000
Sort Bids By: Line Score
Sort Order: Descending
Analyze

Display Options: View Factor Responses
☐ Display Delta Responses
☐ Display Disqualified Bids
☑ Display Withdrawn Bidders

View Bid Actions
☑ All Bid Actions
☐ Award
☐ Counter
☐ Disallow
☐ Reject
☐ <No Action>

Analysis

Bidder Name	US TECHNOLOGIES INC	TURN-KEY SECURITY SOLUTIONS LLC	TRANS-TEL CENTRAL LLC	TECHSICO ENTERPRISE SOLUTIONS LLC	SUMMIT FIRE & SECURITY LLC
Event Version	1	1	1	1	1
Bid Number	1	1	2	1	2
Bid Quantity	1.0000	1.0000	1.0000	1.0000	1.0000
Minimum Bid Quantity	0.0000	0.0000	0.0000	0.0000	0.0000
Total Bid Amount	1.00	1.00	1.00	1.00	1.00
Total Bid Cost	1.00	1.00	1.00	1.00	1.00
Total Line Score	100.0000	100.0000	100.0000	100.0000	100.0000
Bid Action					
Reject Reason Code					
Award by Percent					
Award Quantity					
Hide Bid	☐	☐	☐	☐	☐

▶ Factors

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

OK | Cancel | Apply

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.

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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.

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.

Click the **View** 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 **Return** button.

To return to the **Analyze Total** page, **click** the **Cancel** button, then the Analyze Total link.

Awarding Bid Responses: Award to Supplier

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 **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 **Save** button.

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

Select the **Award Events** option from the Go To dropdown menu.

Award Option 1: Award to Supplier

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 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.

Award Details

Award Details   Award Summary   Review Constraints
Business Unit: Event ID: Round: Version: Event Name:
09000   EV00000276   1   1   Supplemental RFP-SW1048-Surveillance Equipment&ser
Event Format: Event Type: Currency: End Date: Status: Status: Go To:
Buy   RFx   USD   09/05/2023 3:00PM CDT   Awarded   ...

▼ **Show Award Details to Bidders**
☐ Display bids   ☐ Display all bids   ☐ Display bid scores   ☐ Display bid's total bid price   ☐ Display factors

Award Details ⓘ   ◁ ◁ 1 of 1 ▷ ▷

Bidder Name JOHNSON CONTROLS US HOLDINGS LLC   Bidder Type Supplier   Buyer CZACHARIA
Award Type Procurement Contract   Award Currency Event   USD   Terms 45
*Contract Style Purchase Order
Contract ID 00000000000000000007518   PO Business Unit 09000
Award Number   1   Total Award   7.0000

Notice the Event Status changed to Awarded.

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

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Contract Entry
Contract

SetID	00000
Contract ID	00000000000000000007518

Contract Version

Version	1	Status Current

*Status [Open ▾]   Approval Due Date [_____ 📅]

Administrator/Buyer [CZACHARIA 🔍]   [Add a Document]
                    Cini Zacharia (090)

▼ **Header** ⑦

*Contract Style [Purchase Order 🔍]

Process Option Purchase Order

*Supplier [JOHNSON CO-01ξ 🔍]   Supplier Search

*Supplier ID [0000508489 🔍]   JOHNSON CONTROLS US HOLDINGS LLC

Primary Contact [🔍]

Supplier Contract Ref [_____]

Description [Supplemental RFP-SW1048-Survei]

Master Contract ID [_____ 🔍]

*Begin Date [09/26/2024 📅]

Expire Date [_____ 📅]

Renewal Date [_____ 📅]

Control Type [▾]

☐ Tax Exempt
☑ Auto Default   Tax Exempt ID [_____]
☐ Lock Chartfields

Edit Comments
Contract Activities
Primary Contact Info
Contract Header Agreement
Contract Releases
Custom Fields

Activity Log
Document Status
Thresholds & Notifications
Price Adjustment Template
Purchase Order BU Defaults

☑ Statewide Contract

Currency [USD 🔍]

Rate Date [09/26/2024]   [CRRNT 🔍]

☐ **Must Use Contract Rate Date**
☑ **Allow Multicurrency PO**

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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

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

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.

The user will input the Bidder's TIN number and **click** the **Search** 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.

Award Option 2: Award to Bidder with Supplier ID

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.

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 **Yes** 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.

| OK |

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.

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