

Miami-Dade County

Smart Numbering Job Aid

Version 1.0



TABLE OF CONTENTS

TABLE OF CONTENTS	2
PURPOSE	2
ACTIVITY 1: SMART NUMBERING	3
ACTIVITY 2: AWARD AND CREATE A PARENT CONTRACT	6

PURPOSE

To provide a clear and concise guide for utilizing the Smart Numbering system within the Strategic Sourcing platform. Smart Numbering functionality ensures consistent and synchronized numbering between sourcing events and resulting contracts, enabling streamlined administrative processes, accurate reporting, and alignment with county guidelines. This job aid will assist users in navigating the new features, understanding system functionality, and applying best practices to maintain accurate and efficient contract management processes within the Strategic Sourcing system.

<u>Note:</u> The Event ID will serve as the Group Multi Supplier (Parent) Contract ID, maintaining a consistent numbering sequence from the initial sourcing event to the resulting contract.

Users with central buyer roles will have the functionality to select the solicitation Contract Style i.e. (ITB, RTQ, RFP, etc.) when creating the sourcing event and the event numbering prefix will follow the contract style selected.



ACTIVITY 1: SMART NUMBERING

Step	Action
1.	Navigate to: Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer > Create Events > Event Details
2.	 Select Add a New Value Select corresponding Business Unit, Event Format, and Event Type Select the desired Event Style.
	End an Existing Value Keyword Search Add a New Value Business Unit PM Event ID NEXT Event Round 1 Event Format Bay Event Type RFx Event Type RFx Event Style Proxyl Bidding (Auctions Only) Deabled Add New Value
	Style ID Contract Style
	Cl Clerk of Courts
	EDP Equitable Distribution Program
	El Elections
	EPP PEP EVP DI IR PDGM Ran for Proci
	ITB Invitation to Bid
	PD Police
	PP Pilot Project
	RESOLUTION Resolution
	REVENUE Revenue Generation
	RFP Request for Proposal
	RFQ Request for Qualification
	RTQ Request to Qualify
	TC Tax Collector



Step	Action
3.	Select Add
	New Window Create Events
	Eind an Existing Value Keyword Search Add a New Value
	Business Unit PM Q
	Event ID NEXT
	Event Round 1 Event Version 1
	Event Format Buy 🗸
	Event Type RFx ~
	Event Style TB Q
	Proxy Bidding (Auctions Only) Disabled
	Add
4.	Complete all event header required fields. Please refer to the <u>SCM 204 - Create a New</u>
	Buy Event for instructions on how to create a Buy Event.
	Select the Save Event button
	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 Generate Bid Event Packet
	• The header details will update the Event ID with the Smart Numbering Event
	Style prefix
	Create Event Details
	Create an Event
	Event Summary Business Unit PM EventID ITB0000004 Round 1 Version 1 EventFormat Buy
	0
	Event Type RFx Change to Auction
	*Event Name Smart Numbering Event Event Preview Date 01/10/2025
	Description Event for ITB contract style Event Start Date 01/10/2025 III Time 10.20AM
	Q&A End Date 01/10/2025 Time 10:20AM
	*Method of Award ************************************
	*Construction No Copy From Go



Step	Action
5.	Once all the sourcing event details have been entered, post the event. Please refer to the SCM 204 - Create a New Buy Event for instructions on how to create a Buy Event.
	*Insurance Required No Copy From Go



ACTIVITY 2: AWARD EVENT AND CREATE A PARENT CONTRACT

Step	Action
1.	Navigate to: Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer > Manage Sourcing Events > Event Workbench
	Search by Event ID
	Event Workbench Search Criteria Business Unit PM Event ID ITB000004 From Start Date ITB Sort With End Date Created By Q From End Date ITB Sort Order Sort Order Event Format Category Event Type Item ID Use my search defaults
	Associated With Q Plan Name Q Default Search Preferences
2.	Select the Analyze Bid Icon that appears to the far right of your Event ID line
	Scroll down to Bid Action and select Award from the dropdown, then select Save
	Calculated Evaluated Price 19,600.00 5% Threshold 20,500.00 10% Threshold 21,560.00 15% Threshold 22,540.00 Bid Action Averad Reject Reason Award by Percent 100.000 Hide Bid Recalculate Unhide Bids Save Return to Search Previous in List Next in List Analyze Total Vandyze Line Vendor Files
3.	Return to Event Workbench and search for the event again. Select the Ribbon icon to
	view Event Details



Step	Action
4.	Select Post Award
	Award Details Award Details Buildness luit: Event Dom Event Some Event Some Total Bits Reconvel; PM Composed 2 Some Number Spent Loweld Yune Event Some Bay PS USD V INDOCES Status: Status: Status: Go To: Bry PS USD V INDOCES Statuses Pending Award Image: V V * Show Award Details to Bidders Image: V Ongate total status: Image: V Image: V V V
	Asserd Details (* * * * * * * * * * * * * * * * * * *
5.	Note that the Contract ID has been generated. Also note the association with the
	Smart Numbering Event ID
	Award Details Anset Details Anset Details Neuroir Controlling Part Details Round: Vernico: Event Barl Total Bids Received: Part Totals Round: Vernico: Event Barl Total Bids Received: Part Totals Total Bids Received: Total Bids Received: Part Totals Total Bids Received: Total Bids Received: Part Totals: Statis: Statis: Statis: Boy RFX UB On the Statistics: Go To: Boy RFX UB Averd Mark Image: Total Bids Received:
	Award Details ① K + (Tatt +)
	Bitter Value Title Dispetitie Bitter New F Elevent Award Type Processent 00 contract Award Contract VDD Terms 20H Centract 00 contract Dispetities PO Business Mate PO 20H 20H Award Turner 1 Total Award 13.600 0000 1 10000
	Implication Group ID UDM Assirt Association Proce Extended Proce Une Name Total Supplem Ref Tem Description Group ID UDM Assirt Association Proce Extended Proce
	1 S Omart Numbering Net EA 20 0000 960 0000 105,000,000 III #



Step	Action
6.	Scroll up to the Go To dropdown menu • Select Create a Parent Contract
	Award Details Award Summary Review Constraints Award Details Award Summary Review Constraints Business Unit: Event ID: Round: Version: Event Name: Method of Award: Total Bids Received: PM IT58000004 1 2 Smart Numbering Event Lowest by Line Event Format Event Type: Cent Total: Status: Go To: Buy RFx USD 01/10/2025 10:40AM EST Pending Award • Show Award Details to Bidders
	□ Display bids □ Display bid scores □ Display bid's total bid pictores □ Display bid's total bid pictores <t< td=""></t<>
	Award Lines PO Business Unit PM Q Notice of Intent to Award Award Number Award Lines PO Business Unit PM Q Notice of Intent to Award Review Optimization
7.	Enter your Contract ID and Style ID Select Group Multi Supplier from the Contract Process Option dropdown Select Add Contract Entry Find as Eviction Value
	SetID MDC Q Contract ID ITB0000004 Style ID ITB Q
	Contract Process Option Group Multi Supplier
	Find an Existing Value Keyword Search Add a New Value



Step	Action
8.	Note that Contract ID is the Event Smart Numbering ID
	Select Additional Details
	Contract Defails Additional Defails Insurance Defails
	Contract
	Setto MCC Add a Document
	*Contract Style Imitation to Bid QL Process Option Group Matta Supplier Theme Option Amile Supplier
	Description New Version
	Administrator/Byyer Q Version 1 "Begin Date 01/02025 mm Status Current
	Expire Dute Contract Header Agreement Approval Due Dute Approval Due Dute
	Renewal Date Activity Leg Orseg Contract Summary Currency USD Q MOC Alcolators
	Rate Type CRINT Q
	▼ Related Contracts
	Add Interest Contract Total Released Amount 0.00 USD
	Save Notify Refinesh Add Update Display Connect History Context Context Details Insurance Details
9	On the GRI drondown field select N – No Grant Funding – w/UAP
5.	Select Save
	Contract Contract Details Additional Details Insurance Details
	SettD MDC Version 1
	Relate Contract
	GRI N - No Grant Funding - w/ UAP
	IG: Y UAP: Y
	Retainage % 0.000
	Save Notify Refresh Add Update/Display Correct History
	Contract Contract Details Additional Details Insurance Details