



## **Miami-Dade County**

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# Smart Numbering Job Aid

**Version 1.0**



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**PURPOSE**

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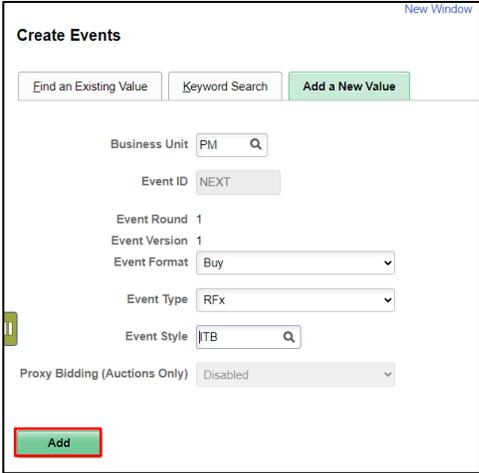
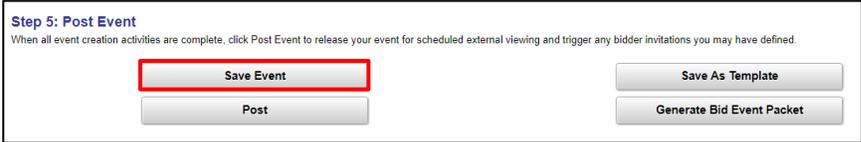
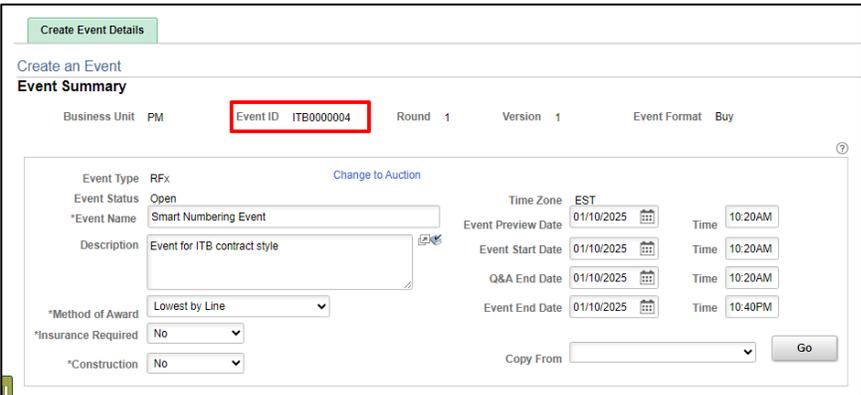
To provide a clear and concise guide for utilizing the Smart Numbering system within the Strategic Sourcing platform. Smart Numbering functionality ensures consistent and synchronized numbering between sourcing events and resulting contracts, enabling streamlined administrative processes, accurate reporting, 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.

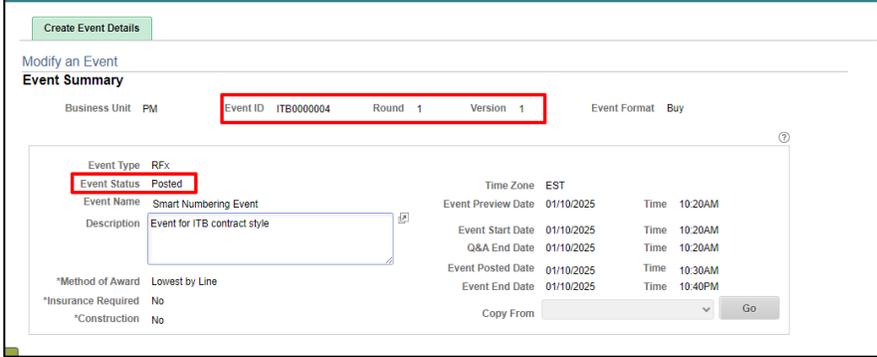
**Note:** The Event ID will serve as the Group Multi Supplier (Parent) Contract ID, maintaining a consistent numbering sequence from the initial sourcing event to the resulting contract.

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.

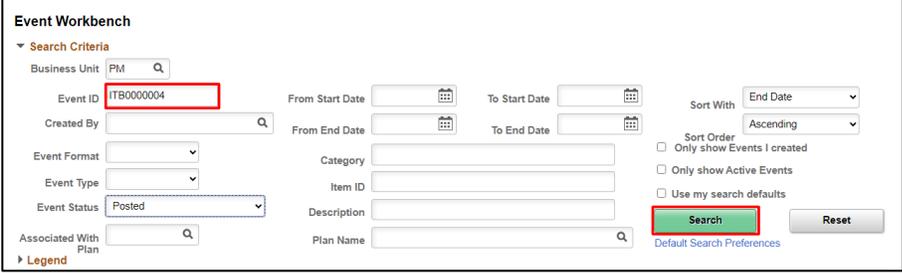
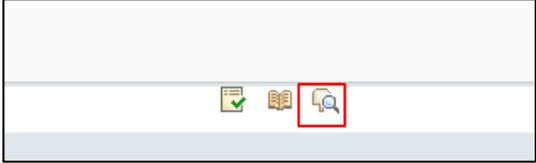
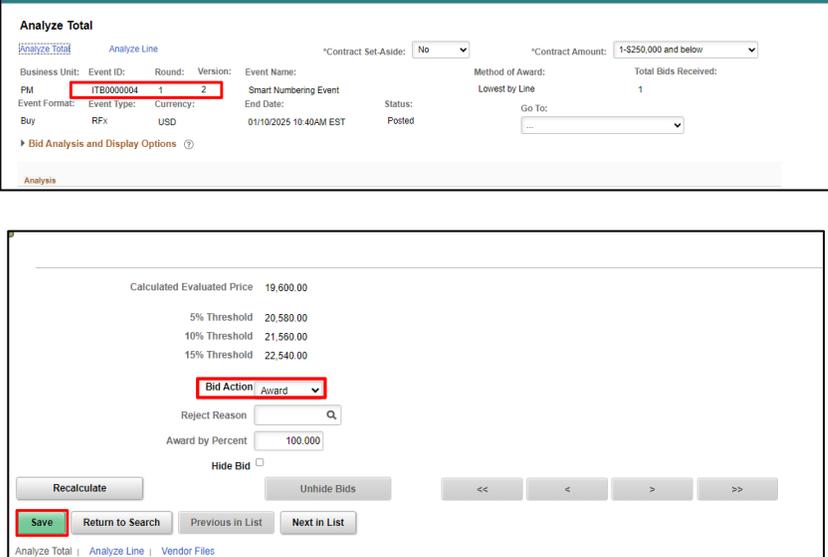
**ACTIVITY 1: SMART NUMBERING**

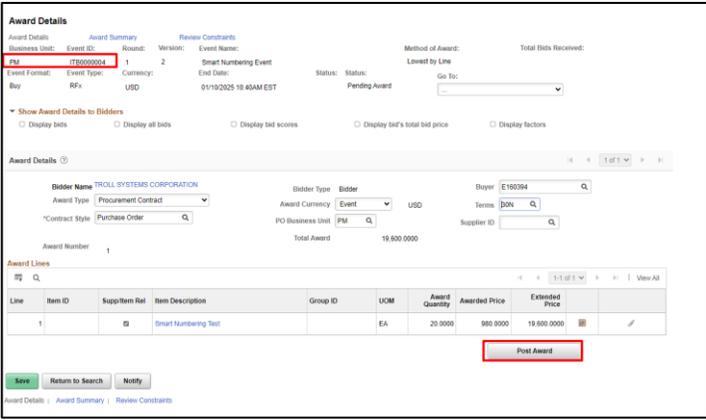
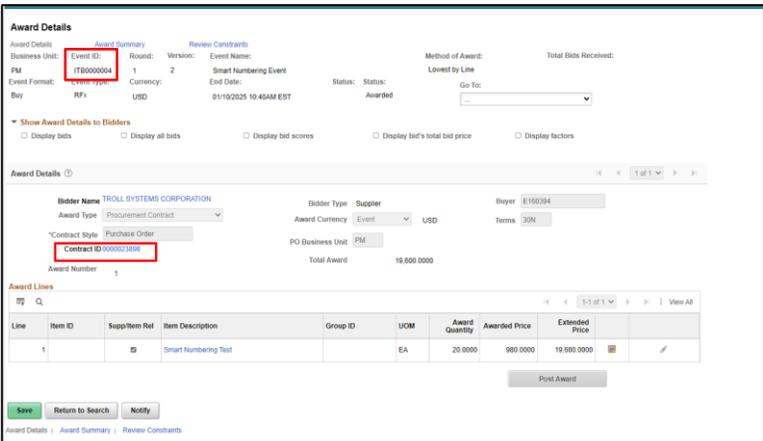
Step	Action																																
1.	Navigate to: <b>Finance/Supply Chain (FSCM) &gt; Supply Chain Operations &gt; Buyer &gt; Create Events &gt; Event Details</b>																																
2.	<p>Select <b>Add a New Value</b></p> <ul style="list-style-type: none"> <li>• Select corresponding <b>Business Unit, Event Format, and Event Type</b></li> <li>• Select the desired <b>Event Style</b>.</li> </ul> <div data-bbox="581 562 1114 991" data-label="Form"> <p>The screenshot shows the 'Create Events' form with the following fields: Business Unit (PM), Event ID (NEXT), Event Round (1), Event Version (1), Event Format (Buy), Event Type (RFx), Event Style (highlighted with a red box), and Proxy Bidding (Auctions Only) (Disabled). There is an 'Add' button at the bottom.</p> </div> <div data-bbox="695 1031 1000 1598" data-label="Table"> <p>Search Results</p> <p>View 100   1-15 of 15</p> <table border="1"> <thead> <tr> <th>Style ID</th> <th>Contract Style</th> </tr> </thead> <tbody> <tr><td>CFM PURCH</td><td>Confirmation Purchase</td></tr> <tr><td>CL</td><td>Clerk of Courts</td></tr> <tr><td>EDP</td><td>Equitable Distribution Program</td></tr> <tr><td>EL</td><td>Elections</td></tr> <tr><td>EPP-RFP</td><td>EXP PUR PRGM-Req for Prpsl</td></tr> <tr><td>HYBD</td><td>Hybrid</td></tr> <tr><td>ITB</td><td>Invitation to Bid</td></tr> <tr><td>PD</td><td>Police</td></tr> <tr><td>PP</td><td>Pilot Project</td></tr> <tr><td>RESOLUTION</td><td>Resolution</td></tr> <tr><td>REVENUE</td><td>Revenue Generating</td></tr> <tr><td>RFP</td><td>Request for Proposal</td></tr> <tr><td>RFQ</td><td>Request for Qualification</td></tr> <tr><td>RTQ</td><td>Request to Qualify</td></tr> <tr><td>TC</td><td>Tax Collector</td></tr> </tbody> </table> </div>	Style ID	Contract Style	CFM PURCH	Confirmation Purchase	CL	Clerk of Courts	EDP	Equitable Distribution Program	EL	Elections	EPP-RFP	EXP PUR PRGM-Req for Prpsl	HYBD	Hybrid	ITB	Invitation to Bid	PD	Police	PP	Pilot Project	RESOLUTION	Resolution	REVENUE	Revenue Generating	RFP	Request for Proposal	RFQ	Request for Qualification	RTQ	Request to Qualify	TC	Tax Collector
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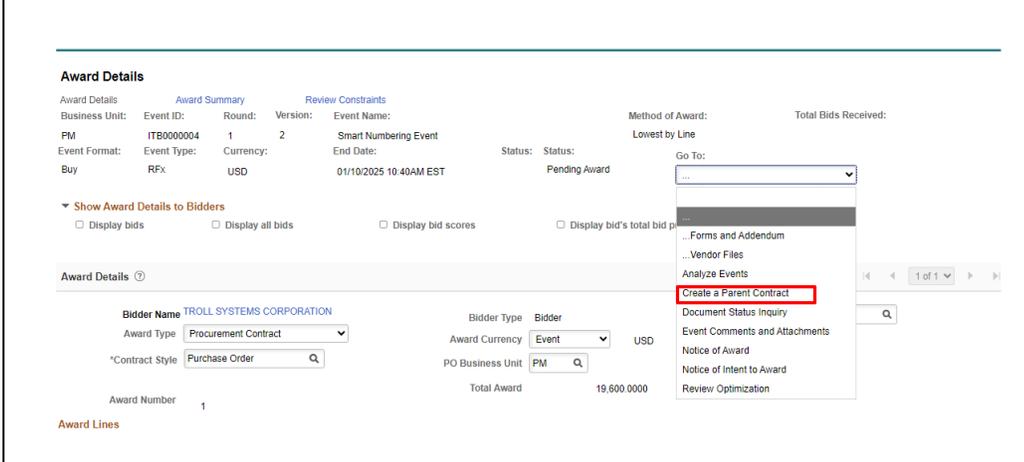
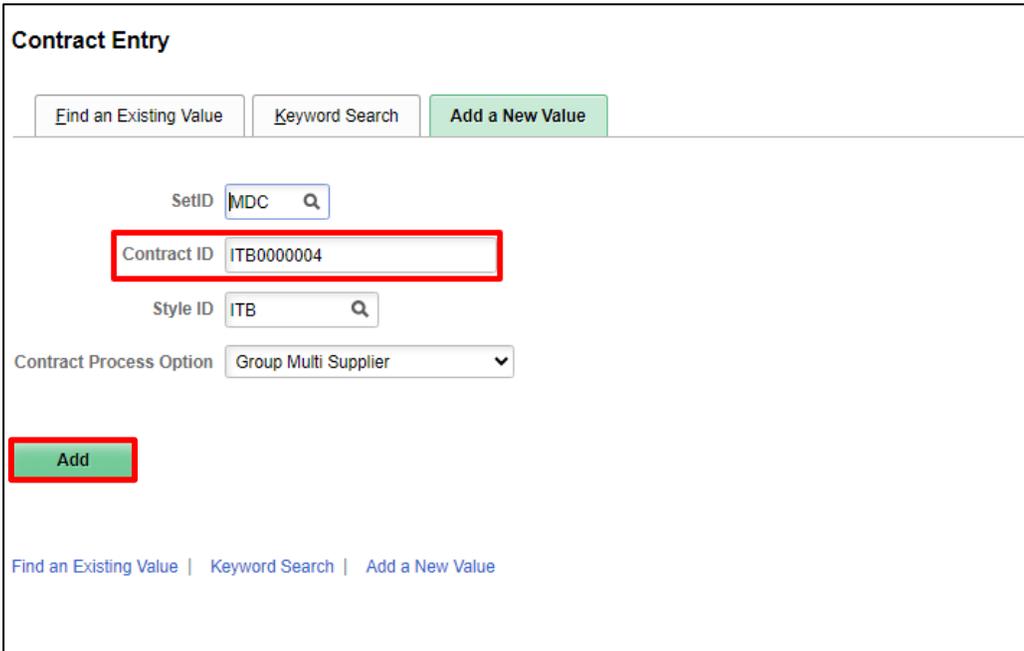
Step	Action
3.	<p>Select <b>Add</b></p> 
4.	<p>Complete all event header required fields. Please refer to the <a href="#">SCM 204 - Create a New Buy Event</a> for instructions on how to create a Buy Event.</p> <ul style="list-style-type: none"> <li>Select the <b>Save Event</b> button</li> </ul>  <ul style="list-style-type: none"> <li>The header details will update the Event ID with the Smart Numbering Event Style prefix</li> </ul> 

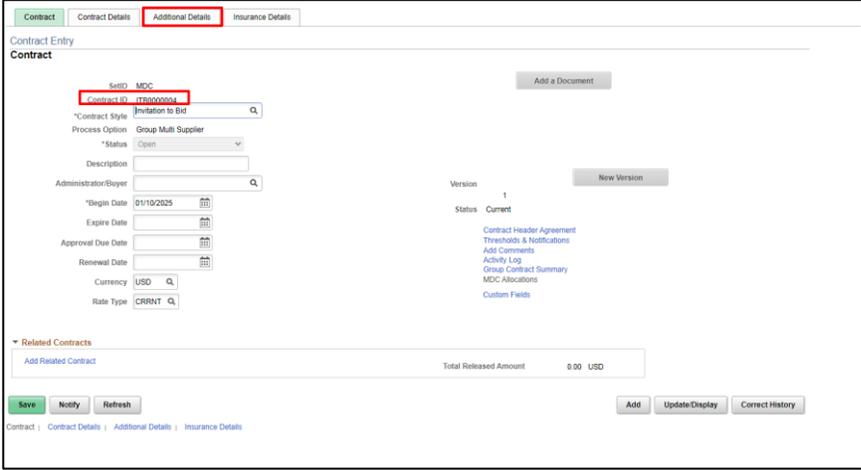
Step	Action
5.	<p>Once all the sourcing event details have been entered, post the event. Please refer to the <a href="#">SCM 204 - Create a New Buy Event</a> for instructions on how to create a Buy Event.</p>  <p>The screenshot shows the 'Modify an Event' page with the following details:</p> <ul style="list-style-type: none"> <li>Business Unit: PM</li> <li>Event ID: ITB0000004 (highlighted in red)</li> <li>Round: 1</li> <li>Version: 1</li> <li>Event Format: Buy</li> <li>Event Type: RFX</li> <li>Event Status: Posted (highlighted in red)</li> <li>Event Name: Smart Numbering Event</li> <li>Description: Event for ITB contract style</li> <li>Time Zone: EST</li> <li>Event Preview Date: 01/10/2025, Time: 10:20AM</li> <li>Event Start Date: 01/10/2025, Time: 10:20AM</li> <li>Q&amp;A End Date: 01/10/2025, Time: 10:20AM</li> <li>Event Posted Date: 01/10/2025, Time: 10:30AM</li> <li>Event End Date: 01/10/2025, Time: 10:40PM</li> <li>*Method of Award: Lowest by Line</li> <li>*Insurance Required: No</li> <li>*Construction: No</li> <li>Copy From: [dropdown menu]</li> <li>Go button</li> </ul>

**ACTIVITY 2: AWARD EVENT AND CREATE A PARENT CONTRACT**

Step	Action
1.	<p>Navigate to: <b>Finance/Supply Chain (FSCM) &gt; Supply Chain Operations &gt; Buyer &gt; Manage Sourcing Events &gt; Event Workbench</b></p> <p>Search by <b>Event ID</b></p> 
2.	<p>Select the Analyze Bid Icon that appears to the far right of your Event ID line</p>  <p>Scroll down to <b>Bid Action</b> and select <b>Award</b> from the dropdown, then select <b>Save</b></p> 
3.	<p>Return to <b>Event Workbench</b> and search for the event again. Select the Ribbon icon to view <b>Event Details</b></p> 

Step	Action
4.	<p><b>Select Post Award</b></p>  <p>The screenshot shows the 'Award Details' page for a Smart Numbering Event. The 'Event ID' is ITB0000004, and the 'Status' is Pending Award. The 'Post Award' button is highlighted in red at the bottom right of the 'Award Lines' table.</p>
5.	<p><b>Note that the Contract ID has been generated. Also note the association with the Smart Numbering Event ID</b></p>  <p>The screenshot shows the 'Award Details' page after the award is posted. The 'Event ID' is ITB0000004, and the 'Status' is Awarded. The 'Contract ID' is now visible and highlighted in red as ITB0000004.</p>

Step	Action
6.	<p>Scroll up to the <b>Go To</b> dropdown menu</p> <ul style="list-style-type: none"><li>• Select <b>Create a Parent Contract</b></li></ul>  <p><b>Award Details</b></p> <p>Award Details   Award Summary   Review Constraints</p> <p>Business Unit: PM   Event ID: ITB0000004   Round: 1   Version: 2   Event Name: Smart Numbering Event   Method of Award: Lowest by Line   Total Bids Received: Pending Award</p> <p>Event Format: Buy   Event Type: RFx   Currency: USD   End Date: 01/10/2025 10:40AM EST   Status: Pending Award</p> <p>Go To: ...</p> <ul style="list-style-type: none"><li>... Forms and Addendum</li><li>... Vendor Files</li><li>Analyze Events</li><li><b>Create a Parent Contract</b></li><li>Document Status Inquiry</li><li>Event Comments and Attachments</li><li>Notice of Award</li><li>Notice of Intent to Award</li><li>Review Optimization</li></ul> <p>▼ Show Award Details to Bidders</p> <p><input type="checkbox"/> Display bids <input type="checkbox"/> Display all bids <input type="checkbox"/> Display bid scores <input type="checkbox"/> Display bid's total bid p...</p> <p>Award Details ⓘ</p> <p>Bidder Name: TROLL SYSTEMS CORPORATION</p> <p>Award Type: Procurement Contract</p> <p>*Contract Style: Purchase Order</p> <p>Award Number: 1</p> <p>Award Lines</p> <p>Bidder Type: Bidder</p> <p>Award Currency: USD</p> <p>PO Business Unit: PM</p> <p>Total Award: 19,600,000</p>
7.	<p>Enter your <b>Contract ID</b> and <b>Style ID</b></p> <ul style="list-style-type: none"><li>• Select <b>Group Multi Supplier</b> from the <b>Contract Process Option</b> dropdown</li><li>• Select <b>Add</b></li></ul>  <p><b>Contract Entry</b></p> <p>Find an Existing Value   Keyword Search   Add a New Value</p> <p>SetID: MDC</p> <p><b>Contract ID: ITB0000004</b></p> <p>Style ID: ITB</p> <p>Contract Process Option: Group Multi Supplier</p> <p><b>Add</b></p> <p>Find an Existing Value   Keyword Search   Add a New Value</p>

Step	Action
8.	<p>Note that <b>Contract ID</b> is the Event Smart Numbering ID</p> <ul style="list-style-type: none"> <li>Select Additional Details</li> </ul> 
9.	<p>On the <b>GRI</b> dropdown field, select <b>N – No Grant Funding – w/UAP</b></p> <ul style="list-style-type: none"> <li>Select Save</li> </ul> 