



Miami-Dade County

Strategic Sourcing: Analyzing an Event by Aggregate Job Aid

Version 1.0

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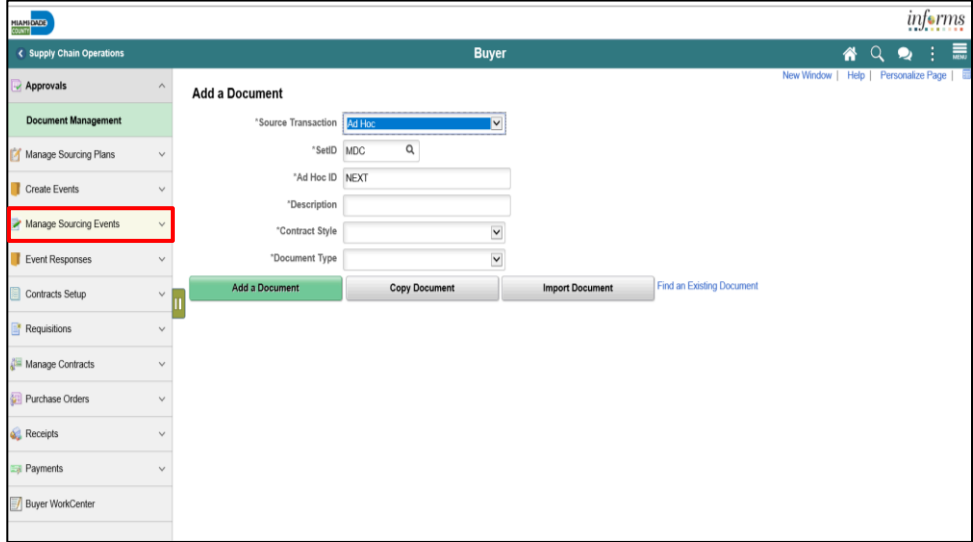
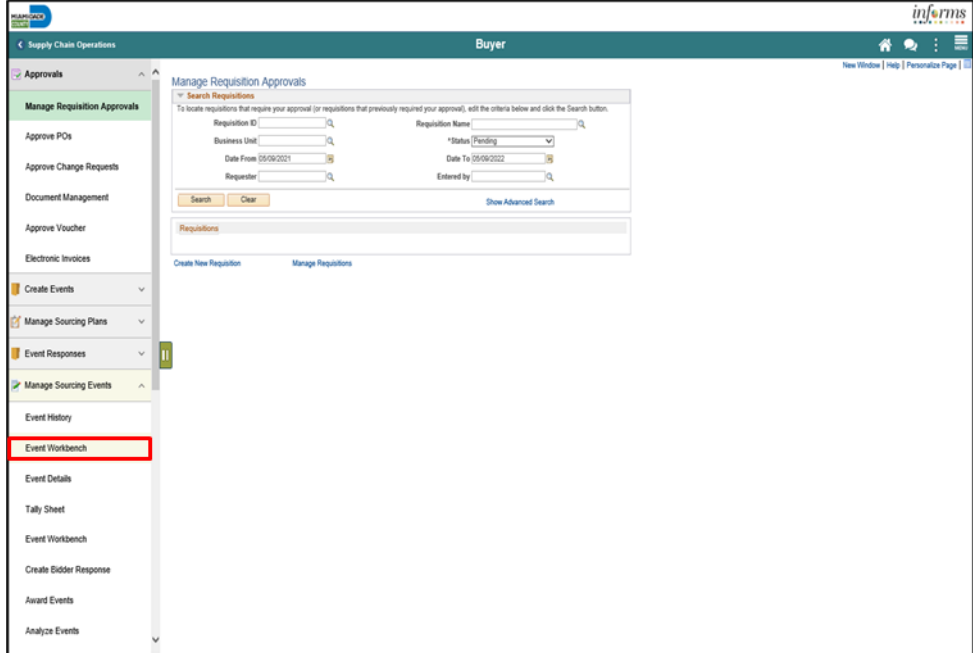
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PURPOSE AND DESCRIPTION

Purpose

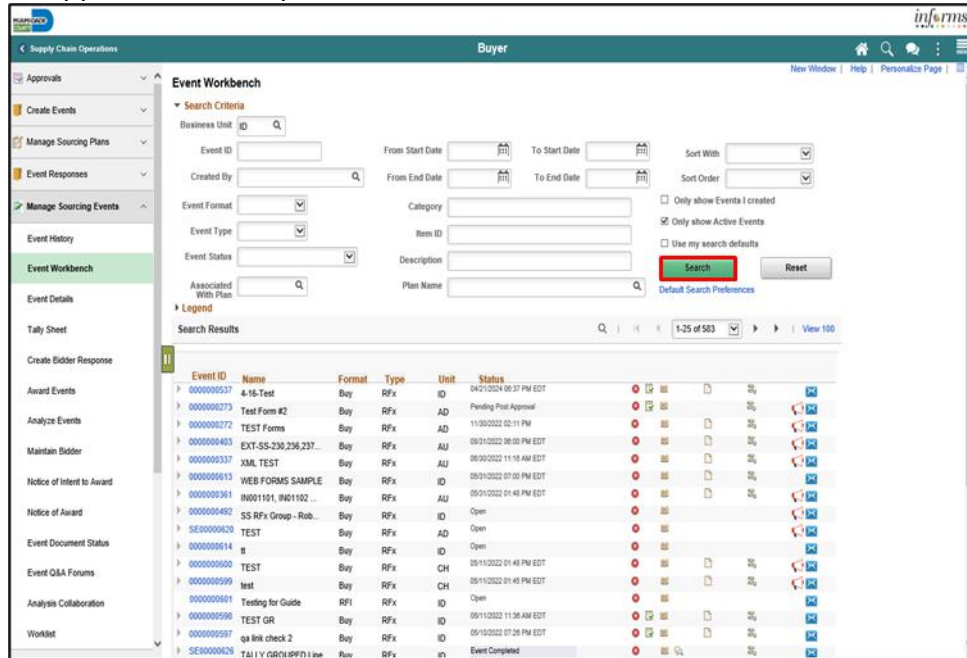
This document explains the key activities involved in analyzing an event by aggregate. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activity.

ANALYZING AN EVENT BY AGGREGATE

Step	Action
1.	Navigate to Finance / Supply Chain (FSCM) > Supply Chain Operations > Buyer
2.	<p>Select Manage Sourcing Events option in the navigation pane.</p> 
3.	<p>Select the Event Workbench object in the navigation pane.</p> 

Input the applicable search parameters and select the **Search** button.

4.

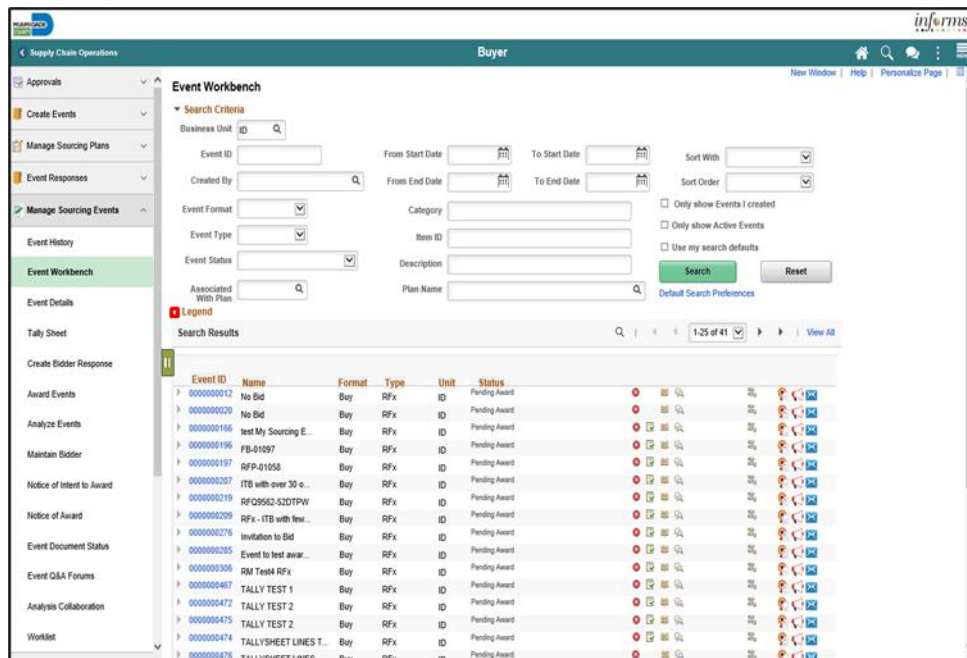


The screenshot shows the 'Event Workbench' interface in the INFORMS Buyer portal. The left sidebar contains navigation options: Approvals, Create Events, Manage Sourcing Plans, Event Responses, Manage Sourcing Events, Event History, Event Workbench (selected), Event Details, Tally Sheet, Create Bidder Response, Award Events, Analyze Events, Maintain Bidder, Notice of Intent to Award, Notice of Award, Event Document Status, Event Q&A Forums, Analysis Collaboration, and Worklist. The main area is titled 'Event Workbench' and includes a 'Search Criteria' section with various filters: Business Unit, Event ID, From Start Date, To Start Date, Sort With, Created By, From End Date, To End Date, Sort Order, Event Format, Category, Only show Events I created, Event Type, Item ID, Only show Active Events, Event Status, Description, Use my search defaults, Associated With Plan, Plan Name, and a Search button (highlighted with a red box). Below the search criteria is a 'Legend' section and a 'Search Results' table. The table has columns: Event ID, Name, Format, Type, Unit, and Status. It displays a list of events with their respective details and status.

Event ID	Name	Format	Type	Unit	Status
0000000537	4-16-Test	Buy	Rfx	ID	04/12/2024 09:37 PM EDT
0000000273	Test Form #2	Buy	Rfx	AD	Pending Post Approval
0000000272	TEST FORM	Buy	Rfx	AD	11/30/2022 02:11 PM
0000000403	EXT-SS-230,236,237...	Buy	Rfx	AU	03/31/2022 06:00 PM EDT
0000000337	XML TEST	Buy	Rfx	AU	08/30/2022 11:18 AM EDT
0000000613	WEB FORMS SAMPLE	Buy	Rfx	ID	05/31/2022 07:50 PM EDT
0000000361	IN001101, IN01102 ...	Buy	Rfx	AU	05/31/2022 01:43 PM EDT
0000000492	SS Rfx Group - Rob...	Buy	Rfx	AU	Open
0000000620	TEST	Buy	Rfx	AD	Open
0000000614	#	Buy	Rfx	ID	Open
0000000500	TEST	Buy	Rfx	CH	05/11/2022 01:43 PM EDT
0000000599	test	Buy	Rfx	CH	05/11/2022 01:43 PM EDT
0000000601	Testing for Guide	Buy	Rfx	ID	Open
0000000596	TEST GR	Buy	Rfx	ID	05/11/2022 11:56 AM EDT
0000000597	qa link check 2	Buy	Rfx	ID	05/10/2022 07:28 PM EDT
0000000626	TALLY V (RFX) Line	Buy	Rfx	en	Event Completed

Expand the **Legend** menu.

5.



The screenshot shows the 'Event Workbench' interface with the 'Legend' menu expanded. The search criteria section is the same as in the previous screenshot. The 'Legend' section is now visible, showing a list of events with their respective details and status. The 'Search Results' table is also visible, showing a list of events with their respective details and status.

Event ID	Name	Format	Type	Unit	Status
0000000012	No Bid	Buy	Rfx	ID	Pending Award
0000000020	No Bid	Buy	Rfx	ID	Pending Award
0000000166	test My Sourcing E...	Buy	Rfx	ID	Pending Award
0000000196	FB-01097	Buy	Rfx	ID	Pending Award
0000000197	RFP-01058	Buy	Rfx	ID	Pending Award
0000000207	ITB with over 30 o...	Buy	Rfx	ID	Pending Award
0000000219	RFO9502-S20TPW	Buy	Rfx	ID	Pending Award
0000000209	Rfx - ITB with new...	Buy	Rfx	ID	Pending Award
0000000276	Invitation to Bid	Buy	Rfx	ID	Pending Award
0000000285	Event to test awar...	Buy	Rfx	ID	Pending Award
0000000306	RM Test4 Rfx	Buy	Rfx	ID	Pending Award
0000000467	TALLY TEST 1	Buy	Rfx	ID	Pending Award
0000000472	TALLY TEST 2	Buy	Rfx	ID	Pending Award
0000000475	TALLY TEST 2	Buy	Rfx	ID	Pending Award
0000000474	TALLY SHEET LINES T...	Buy	Rfx	ID	Pending Award
0000000476	TALLY SHEET LINES	Buy	Rfx	en	Pending Award

Select the **Analyze Bids** button.

Buyer

New Window | Help | Personalize Page | [Icons]

Event Workbench

Search Criteria

Business Unit ID

Event ID From Start Date To Start Date Sort With

Created By From End Date To End Date Sort Order

Event Format Category
☐ Only show Events I created
☐ Only show Active Events
☐ Use my search defaults

Event Type Item ID

Event Status Description

Associated With Plan Plan Name

Legend



☒ Pause ☒ Resume ☒ Cancel ☒ Approval Status ☒ Event History ☒ Analyze Bids ☒ Notice of Intent to Award ☒ Notice of Award

☒ Edit Event ☒ New Version ☒ View Collaboration ☒ Collaboration Available ☒ Collaboration Check Out ☒ Bid History ☒ Notify Me On Check-In ☒ View Award Details

Search Results 1-25 of 41

ID	Name	Format	Type	Unit	Status	Actions
0000000012	No Bid	Buy	Rfx	ID	Pending Award	[Icons]
0000000020	No Bid	Buy	Rfx	ID	Pending Award	[Icons]
0000000166	test My Sourcing E...	Buy	Rfx	ID	Pending Award	[Icons]
0000000196	FB-01097	Buy	Rfx	ID	Pending Award	[Icons]
0000000197	RFP-01055	Buy	Rfx	ID	Pending Award	[Icons]
0000000207	ITB with over 30 o...	Buy	Rfx	ID	Pending Award	[Icons]
0000000219	RFO0562-SZOTPW	Buy	Rfx	ID	Pending Award	[Icons]
0000000209	Rfx - ITB with new...	Buy	Rfx	ID	Pending Award	[Icons]
0000000276	Invitation to Bid	Buy	Rfx	ID	Pending Award	[Icons]
0000000285	Event to test awar...	Buy	Rfx	ID	Pending Award	[Icons]
0000000306	RM Test4 Rfx	Buy	Rfx	ID	Pending Award	[Icons]
0000000467	TALLY TEST 1	Buy	Rfx	ID	Pending Award	[Icons]
0000000472	TALLY TEST 2	Buy	Rfx	ID	Pending Award	[Icons]
0000000475	TALLY TEST 2	Buy	Rfx	ID	Pending Award	[Icons]

Select the applicable option from the **Contract Set-Aside** drop-down.

[Buyer](#)
Analyze Total

[New Window](#) | [Help](#) | [Personalize Page](#)

Analyze Total

[Analyze Total](#)
[Analyze Line](#)

*Contract Set-Aside: 17

*Contract Amount:

Business Unit:
 Event ID: 0000000197
 Round: 1
 Version: 3
 Event: 168
 Total Bids Received: 2

ID:
 Event Format:
 Event Type:
 Currency:
 End Date:
 Status:

Buy: RFX
 USD
 10/01/2021 10:00AM EDT
 Pending Award
 Go To:

[Bid Analysis and Display Options](#)

Analysis

	Bidder Name	OFFICE DEPOT INC	W W GRANGER INC
Bidder Seq#	1	2	
Event Version Responded To	3	3	
Bid Number	1	1	
Bid Qty	2	2	
Ext. Price	95.00	162,487,794.75	

[Factors](#)

Verification

Is Bidder SBE Tier certified?

Bidder Eligible for Disabled VBE Preference?

☐
☐

Bidder qualifies for Local Preference?

☐
☐

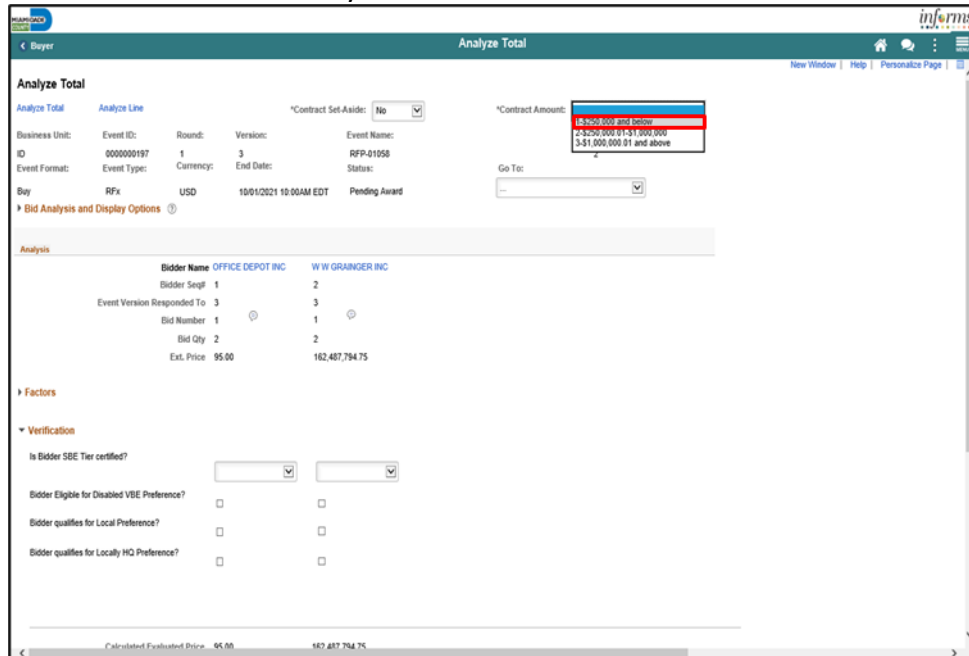
Bidder qualifies for Locality HQ Preference?

☐
☐

Calculated Evaluated Price: 95.00
 162,487,794.75

8.

Select the applicable option from the **Contract Amount** drop-down.
Note: This amount should initially be derived from the lowest raw bid.



Analyze Total

Contract Set Aside: ☒ No Contract Amount: **\$1,400,000 and below**

Business Unit: Event ID: 0000000197 Round: 1 Version: 3 Event Name: RFP-01058
 ID: Event Format: Event Type: End Date: Status: Go To:

Buy: RFX USD 10/01/2021 10:00AM EDT Pending Award

Analysis

Bidder Name	Bidder Seg#	Event Version Responded To	Bid Number	Bid Qty	Ext. Price
OFFICE DEPOT INC	1	3	1	2	95.00
W W GRAINGER INC	2	3	1	2	162,487,794.75

Factors

Verification

Is Bidder SBE Tier certified? ☐ ☐

Bidder Eligible for Disabled VBE Preference? ☐ ☐

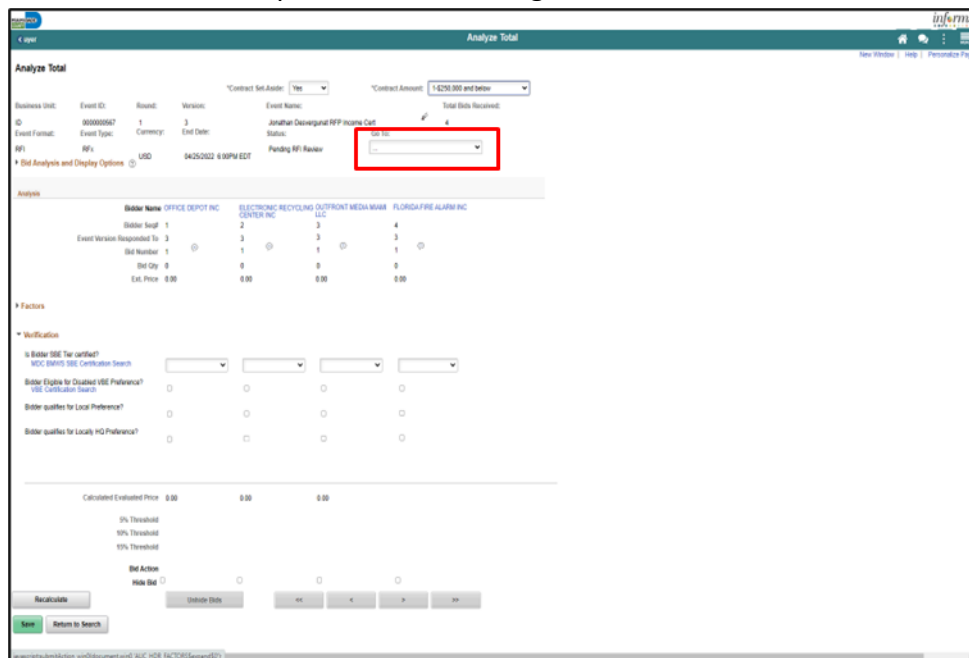
Bidder qualifies for Local Preference? ☐ ☐

Bidder qualifies for Locally HQ Preference? ☐ ☐

Calculated Evaluated Price: 95.00 162,487,794.75

9.

Note: Select the **Go To:** dropdown to view merged files and view vendor files.



Analyze Total

Contract Set Aside: ☒ Yes Contract Amount: \$1,400,000 and below

Business Unit: Event ID: 0000000197 Round: 1 Version: 3 Event Name: Jonathan Disavergand RFP Invoice Opt
 ID: Event Format: Event Type: End Date: Status: Go To: **View Merged Files**

Buy: RFX USD 04/26/2022 6:00PM EDT Pending RFI Review

Analysis

Bidder Name	Bidder Seg#	Event Version Responded To	Bid Number	Bid Qty	Ext. Price
OFFICE DEPOT INC	1	3	1	0	0.00
ELECTRONIC RECYCLING OUTFRONT MEDIA WARE	2	3	1	0	0.00
FLORIDA FIRE ALARM INC	3	3	1	0	0.00

Factors

Verification

Is Bidder SBE Tier certified? ☐ ☐ ☐ ☐

Bidder Eligible for Disabled VBE Preference? ☐ ☐ ☐ ☐

Bidder qualifies for Local Preference? ☐ ☐ ☐ ☐

Bidder qualifies for Locally HQ Preference? ☐ ☐ ☐ ☐

Calculated Evaluated Price: 0.00 0.00 0.00

9% Threshold 9% Threshold 9% Threshold

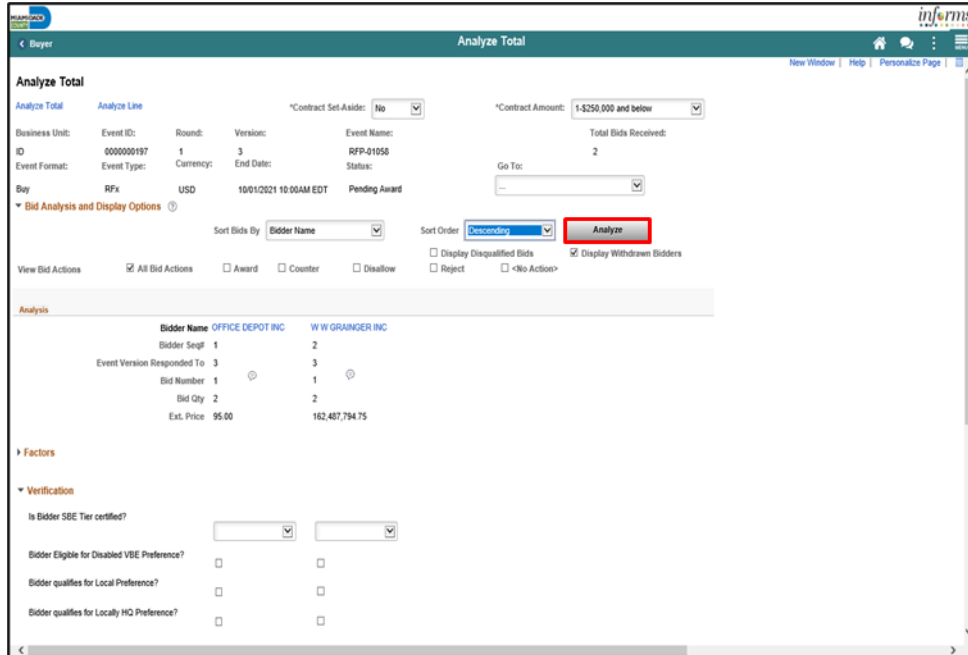
Bid Action: ☐ ☐ ☐ ☐

Recalculate Update Data OK Cancel Print

Save Return to Search

[optional] Select the Expand section **Bid Analysis and Display Options** button. Select the applicable **Sort Bids By** and **Sort Order** options. Then select the **Analyze** button.

10.



Analyze Total

Business Unit: Event ID: Round: Version: Event Name: Total Bids Received:
 ID: 0000000197 Event Type: 1 Currency: 3 End Date: RFP-01058 Status: 2
 Event Format: Event Type: Currency: End Date: Status: Go To: --

Buy RFX USD 10/01/2021 10:00AM EDT Pending Award

*Contract Set-Aside: No *Contract Amount: 1-\$250,000 and below

Bid Analysis and Display Options

Sort Bids By: Bidder Name Sort Order: Descending **Analyze**

View Bid Actions: ☒ All Bid Actions ☐ Award ☐ Counter ☐ Disallow ☐ Display Disqualified Bids ☒ Display Withdrawn Bidders ☐ Reject ☐ <No Action>

Analysis

Bidder Name	OFFICE DEPOT INC	W W GRANGER INC
Bidder Segt	1	2
Event Version Responded To	3	3
Bid Number	1	1
Bid Qty	2	2
Ext. Price	95.00	162,487,794.75

Factors

Verification

Is Bidder SBE Tier certified?

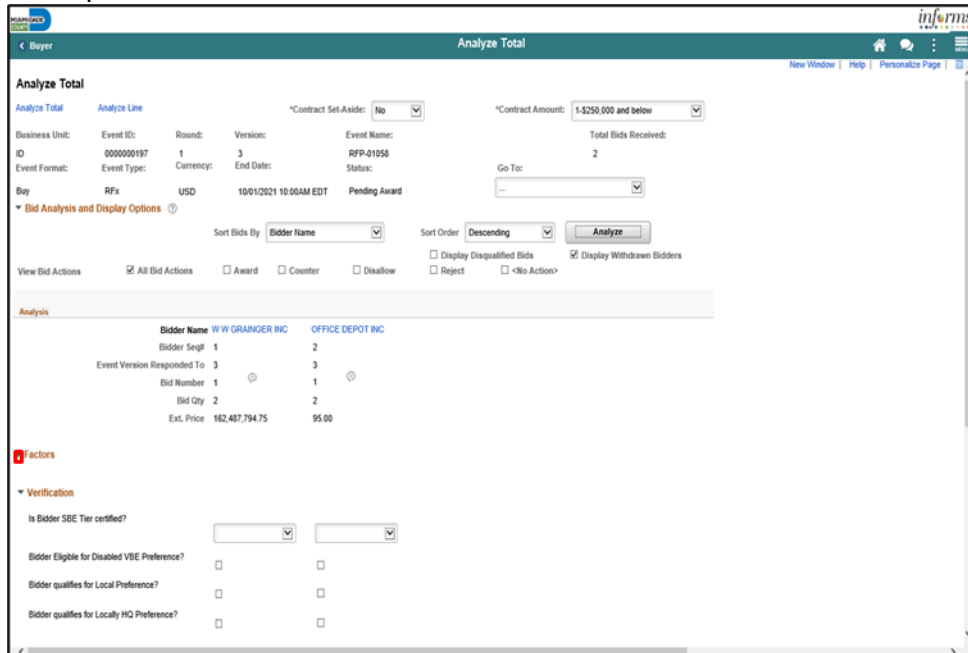
Bidder Eligible for Disabled VBE Preference? ☐ ☐

Bidder qualifies for Local Preference? ☐ ☐

Bidder qualifies for Locally HQ Preference? ☐ ☐

Select the Expand section **Factors** button.

11.



Analyze Total

Business Unit: Event ID: Round: Version: Event Name: Total Bids Received:
 ID: 0000000197 Event Type: 1 Currency: 3 End Date: RFP-01058 Status: 2
 Event Format: Event Type: Currency: End Date: Status: Go To: --

Buy RFX USD 10/01/2021 10:00AM EDT Pending Award

*Contract Set-Aside: No *Contract Amount: 1-\$250,000 and below

Bid Analysis and Display Options

Sort Bids By: Bidder Name Sort Order: Descending **Analyze**

View Bid Actions: ☒ All Bid Actions ☐ Award ☐ Counter ☐ Disallow ☐ Display Disqualified Bids ☒ Display Withdrawn Bidders ☐ Reject ☐ <No Action>

Analysis

Bidder Name	W W GRANGER INC	OFFICE DEPOT INC
Bidder Segt	1	2
Event Version Responded To	3	3
Bid Number	1	1
Bid Qty	2	2
Ext. Price	162,487,794.75	95.00

Factors

Verification

Is Bidder SBE Tier certified?

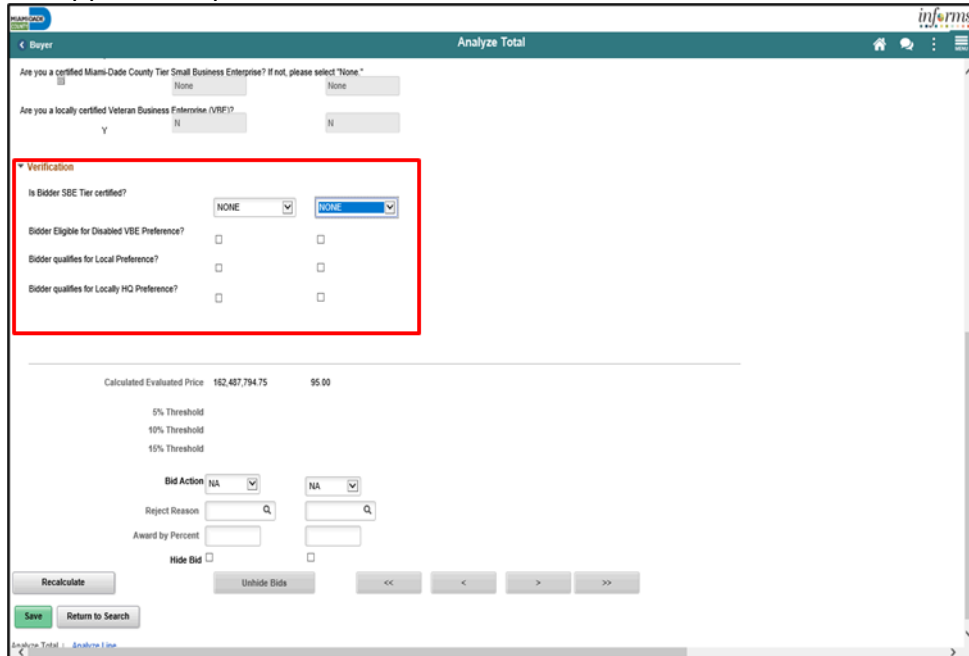
Bidder Eligible for Disabled VBE Preference? ☐ ☐

Bidder qualifies for Local Preference? ☐ ☐

Bidder qualifies for Locally HQ Preference? ☐ ☐

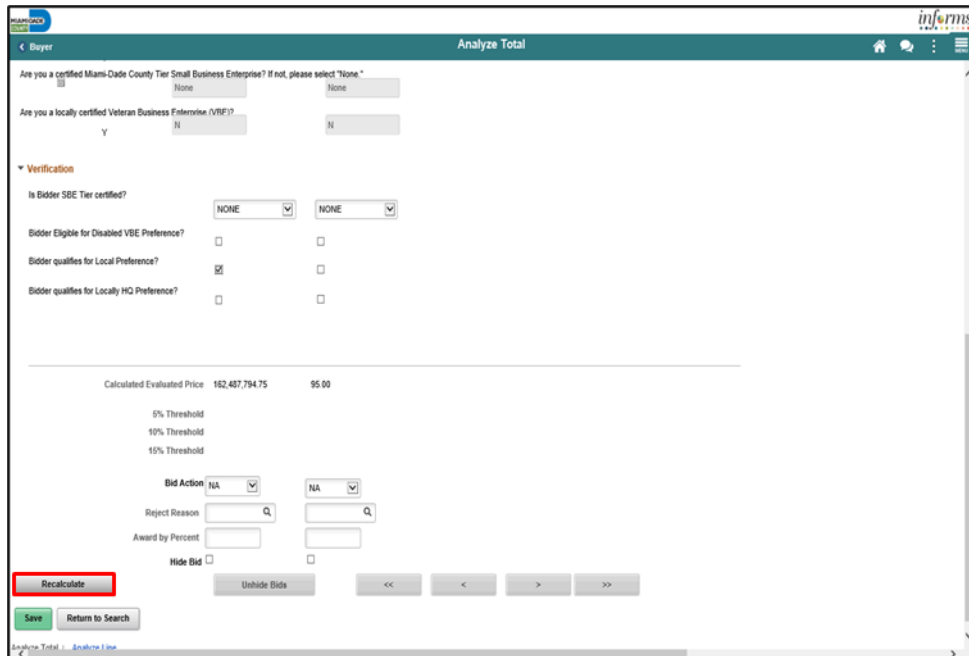
12.

Select the applicable options from the **Verification** section for each bidder.

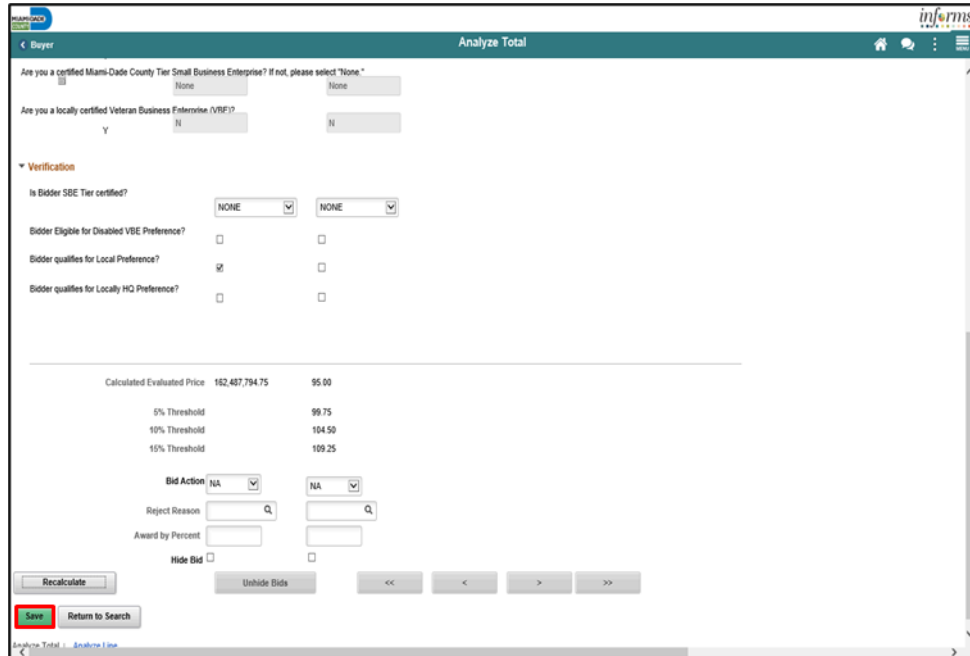


13.

Select the **Recalculate** button.



14.

Select the **Save** button.


Analyze Total

Are you a certified Miami-Dade County Tier Small Business Enterprise? If not, please select "None."

None

Are you a locally certified Veteran Business Enterprise (VBE)?

Y N

Verification

Is Bidder SBE Tier certified?

NONE

Bidder Eligible for Disabled VBE Preference?

☐

Bidder qualifies for Local Preference?

☒

Bidder qualifies for Locally HQ Preference?

☐

Calculated Evaluated Price 152,487,794.75 95.00

5% Threshold 99.75

10% Threshold 104.50

15% Threshold 109.25

Bid Action NA

Reject Reason

Award by Percent

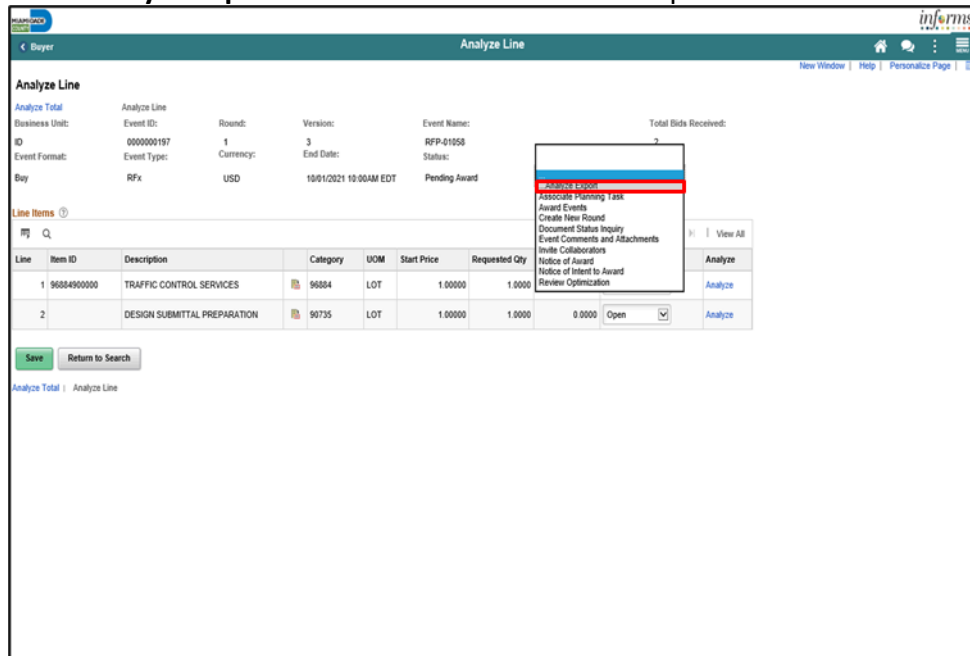
Hide Bid ☐

Unhide Bids

Recalculate

Save Return to Search

15.

Select the **...Analyze Export** list item from the **Go To..** dropdown.


Analyze Line

Business Unit: Event ID: Round: Version: Event Name: Total Bids Received:

ID: 0000000197 1 3 RFP-21558

Event Format: Event Type: Currency: End Date: Status:

Buy Rfx USD 10/01/2021 10:00AM EDT Pending Award

Line Items

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty		
1	96084900000	TRAFFIC CONTROL SERVICES	96084	LOT	1.00000	1.0000		
2		DESIGN SUBMITTAL PREPARATION	90735	LOT	1.00000	1.0000	0.0000	Open

Save Return to Search

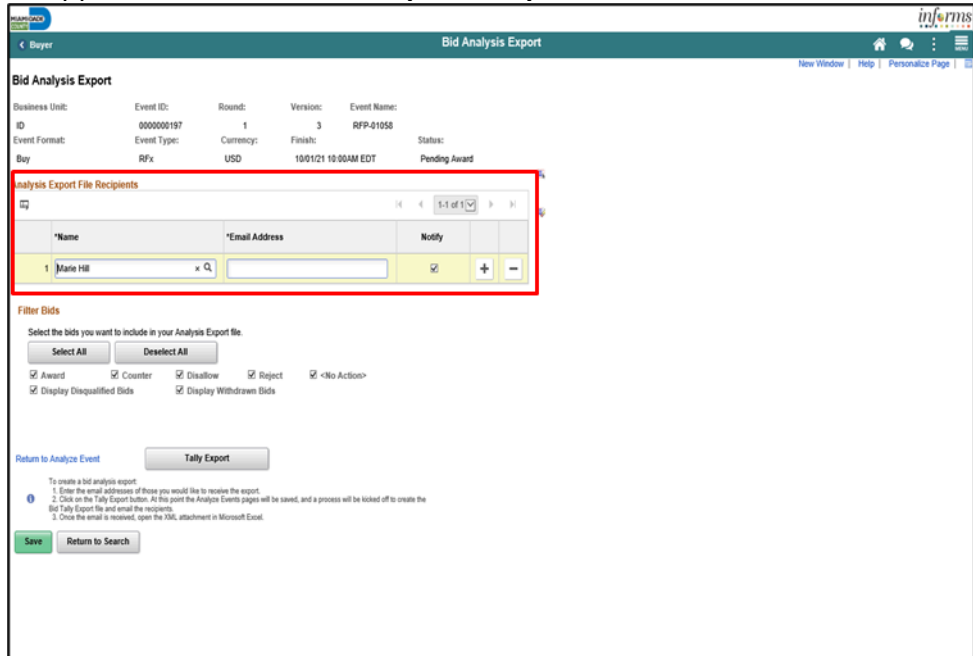
Analyze Total | Analyze Line

Go To.. dropdown menu items:

- Analyze Export
- Associate Planning Task
- Award Events
- Create New Round
- Document Status Inquiry
- Event Comments and Attachments
- Invite Collaborators
- Notice of Award
- Notice of Intent to Award
- Review Optimization

Input the applicable details for the **Export Recipients**.

16.



Bid Analysis Export

Business Unit: Event ID: Round: Version: Event Name:
 ID: 000000197 1 3 RFP-01058
 Event Format: Event Type: Currency: Finish: Status:
 Buy Rfx USD 10/01/21 10:00AM EDT Pending Award

Analysis Export File Recipients

	*Name	*Email Address	Notify
1	Marie Hill		<input checked="" type="checkbox"/>

Filter Bids

Select the bids you want to include in your Analysis Export file.

Select All Deselect All

☒ Award ☒ Counter ☒ Disallow ☒ Reject ☒ <No Action>
☒ Display Disqualified Bids ☒ Display Withdrawn Bids

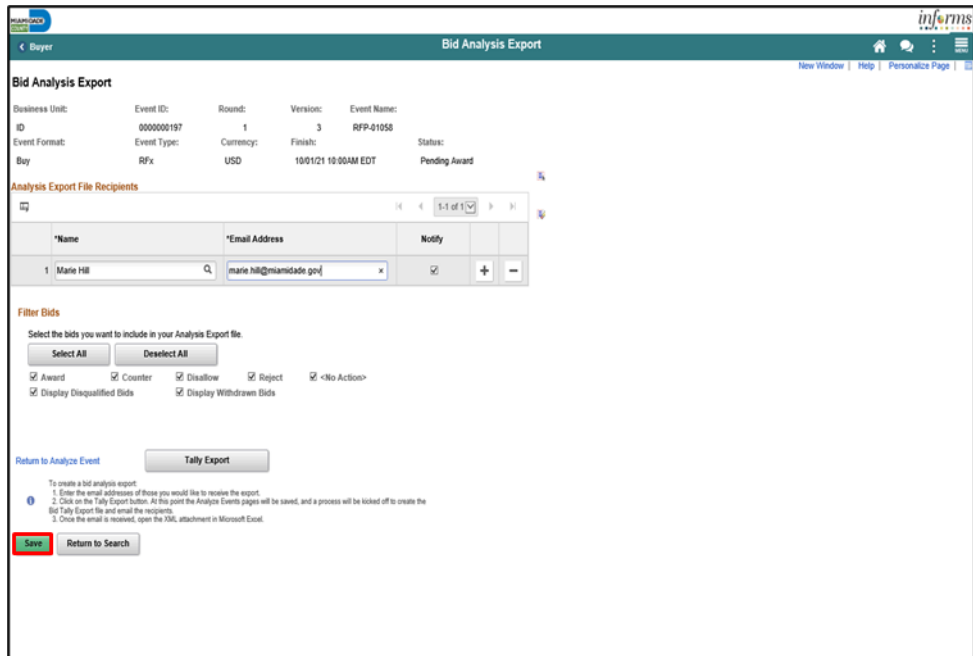
[Return to Analyze Event](#) **Tally Export**

To create a bid analysis export:
 1. Enter the email addresses of those you would like to receive the report.
 2. Click on the Tally Export button. At this point the Analysis Events pages will be saved, and a process will be kicked off to create the Bid Tally Export file and email the recipients.
 3. Once the email is received, open the XML attachment in Microsoft Excel.

Save [Return to Search](#)

Select the **Save** button.

17.



Bid Analysis Export

Business Unit: Event ID: Round: Version: Event Name:
 ID: 000000197 1 3 RFP-01058
 Event Format: Event Type: Currency: Finish: Status:
 Buy Rfx USD 10/01/21 10:00AM EDT Pending Award

Analysis Export File Recipients

	*Name	*Email Address	Notify
1	Marie Hill	marie.hill@miamidade.gov	<input checked="" type="checkbox"/>

Filter Bids

Select the bids you want to include in your Analysis Export file.

Select All Deselect All

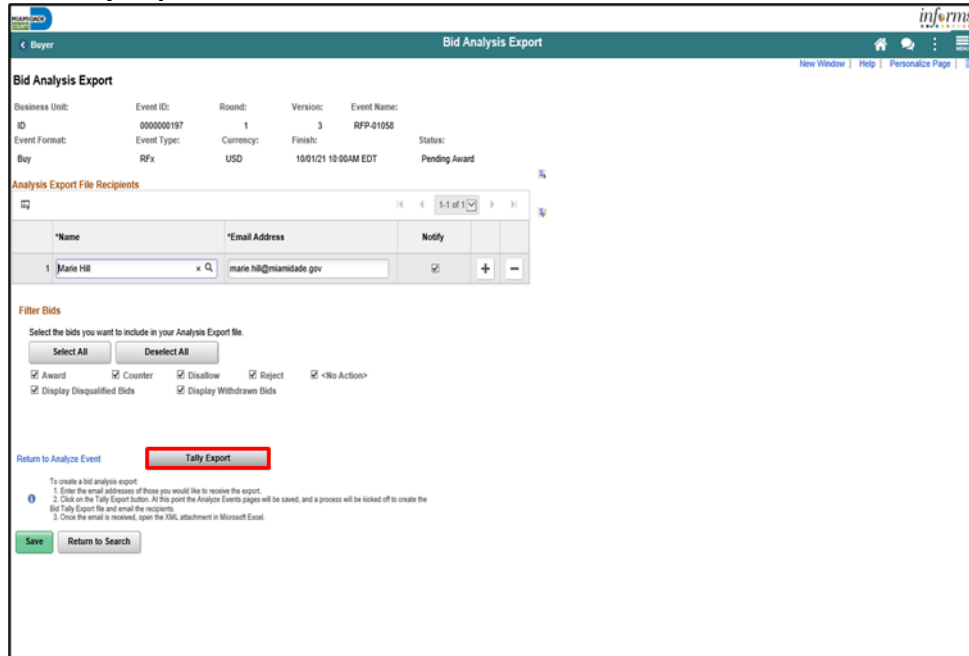
☒ Award ☒ Counter ☒ Disallow ☒ Reject ☒ <No Action>
☒ Display Disqualified Bids ☒ Display Withdrawn Bids

[Return to Analyze Event](#) **Tally Export**

To create a bid analysis export:
 1. Enter the email addresses of those you would like to receive the report.
 2. Click on the Tally Export button. At this point the Analysis Events pages will be saved, and a process will be kicked off to create the Bid Tally Export file and email the recipients.
 3. Once the email is received, open the XML attachment in Microsoft Excel.

Save [Return to Search](#)

18.

Select the **Tally Export** button.


Bid Analysis Export

Business Unit: Event ID: Round: Version: Event Name:
ID: 000000197 1 3 RFP-01058
Event Format: Event Type: Currency: Finish: Status:
Buy Rfx USD 10/01/21 10:00AM EDT Pending Award

Analysis Export File Recipients

#	Name	Email Address	Notify
1	Marie Hill	marie.hill@miamidade.gov	<input checked="" type="checkbox"/>

Filter Bids

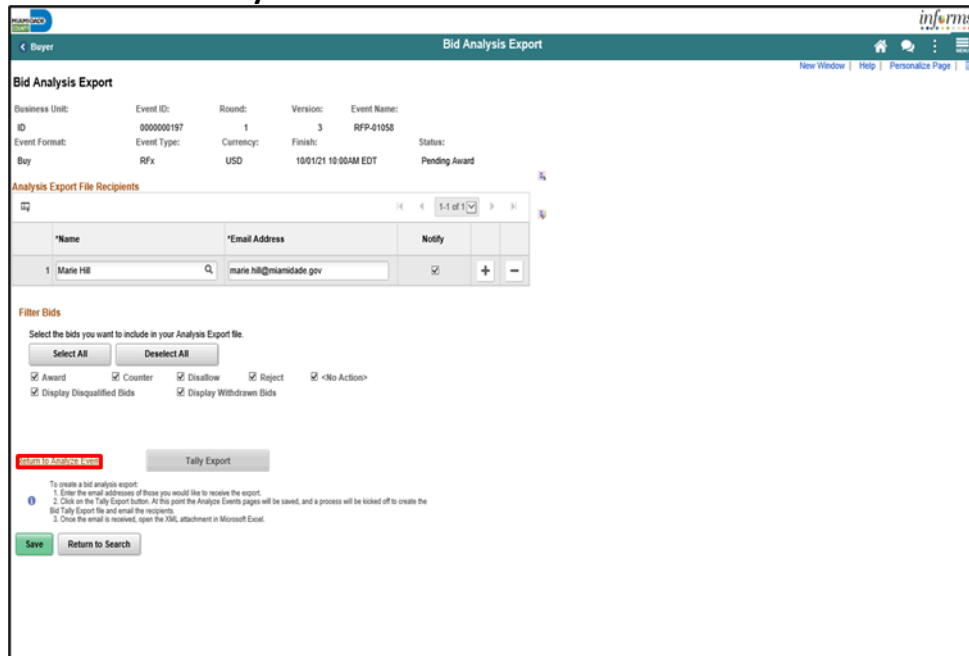
Select the bids you want to include in your Analysis Export file.

☒ Award ☒ Counter ☒ Disallow ☒ Reject ☒ <No Action>
☒ Display Disqualified Bids ☒ Display Withdrawn Bids

Return to Analyze Event

To create a bid analysis export:
 1. Enter the email addresses of those you would like to receive the export.
 2. Click on the Tally Export button. At this point the Analysis Events pages will be saved, and a process will be kicked off to create the Bid Tally Export file and email the recipients.
 3. Once the email is received, open the XML attachment in Microsoft Excel.

19.

Select the **Return to Analyze Event** link.


Bid Analysis Export

Business Unit: Event ID: Round: Version: Event Name:
ID: 000000197 1 3 RFP-01058
Event Format: Event Type: Currency: Finish: Status:
Buy Rfx USD 10/01/21 10:00AM EDT Pending Award

Analysis Export File Recipients

#	Name	Email Address	Notify
1	Marie Hill	marie.hill@miamidade.gov	<input checked="" type="checkbox"/>

Filter Bids

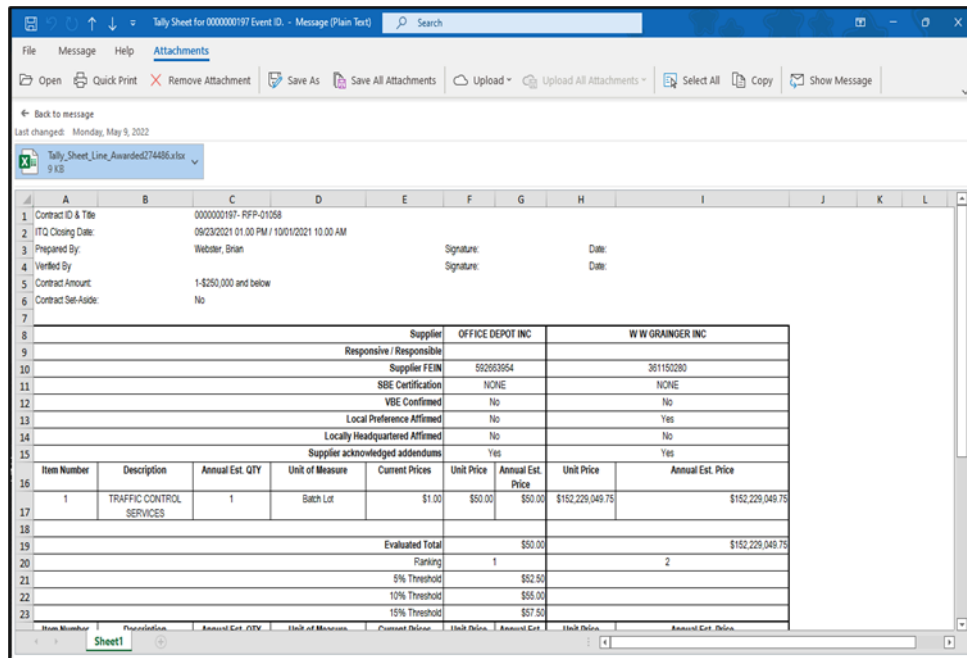
Select the bids you want to include in your Analysis Export file.

☒ Award ☒ Counter ☒ Disallow ☒ Reject ☒ <No Action>
☒ Display Disqualified Bids ☒ Display Withdrawn Bids

To create a bid analysis export:
 1. Enter the email addresses of those you would like to receive the export.
 2. Click on the Tally Export button. At this point the Analysis Events pages will be saved, and a process will be kicked off to create the Bid Tally Export file and email the recipients.
 3. Once the email is received, open the XML attachment in Microsoft Excel.

An email will be sent to the recipient containing an Excel spreadsheet with the bid details.

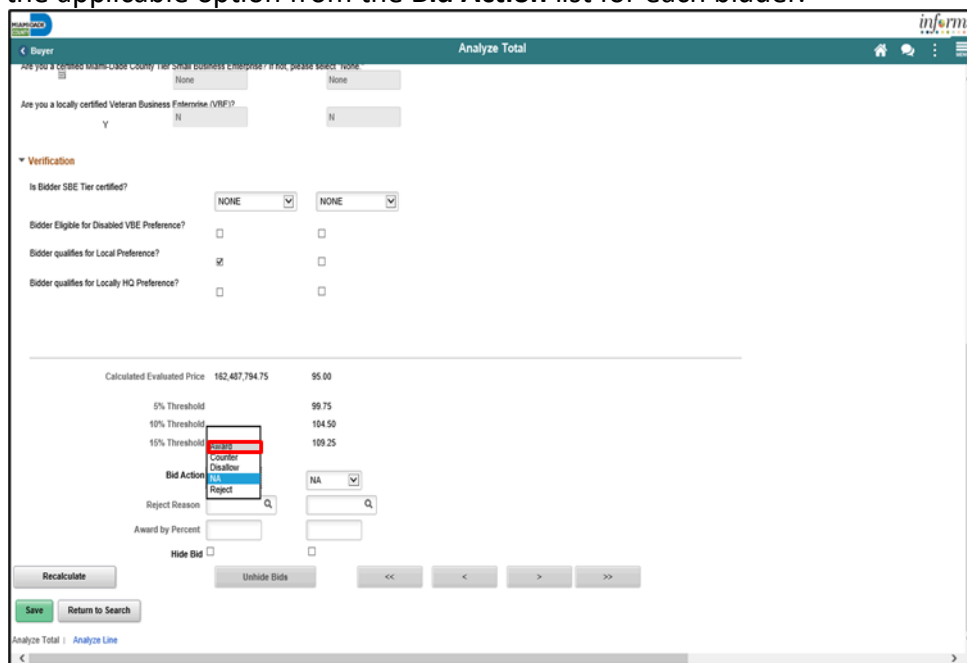
20.



The screenshot shows an email interface with an attachment named 'Tally_Sheet_Line_Awarded274486.xlsx' (9 KB). The spreadsheet is open, displaying a 'Tally Sheet' for Event ID 000000197. It includes fields for Contract ID & Title, ITQ Closing Date, Prepared By, Verified By, Contract Amount, and Contract Set-Aside. Below these are two columns for suppliers: OFFICE DEPOT INC and W W GRAINGER INC. The spreadsheet lists various items, including 'TRAFFIC CONTROL SERVICES', and provides a breakdown of costs, including an 'Evaluated Total' of \$152,229,049.75.

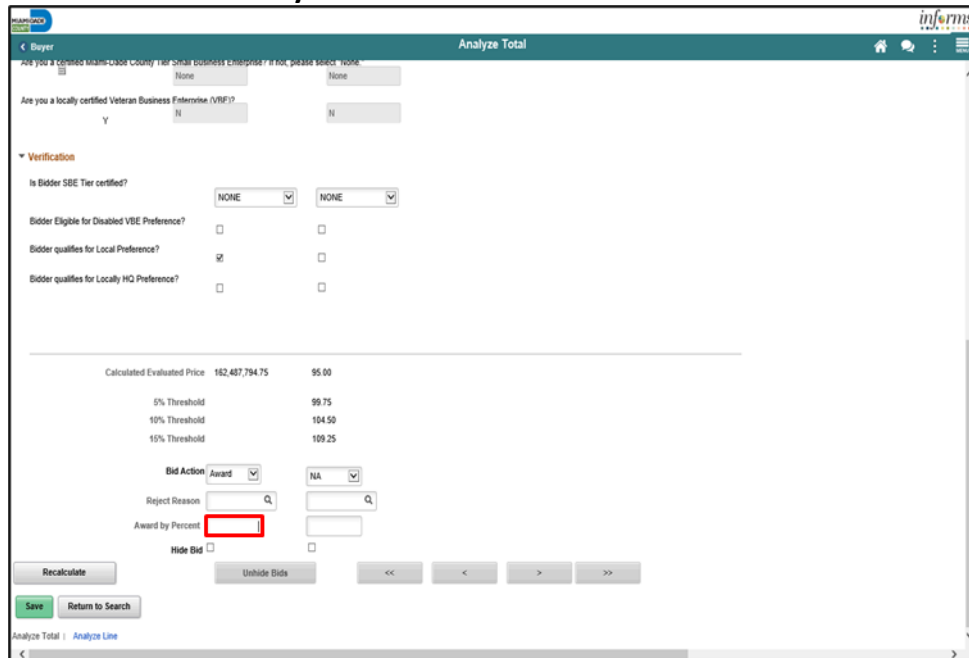
Select the applicable option from the **Bid Action** list for each bidder.

21.



The screenshot shows the 'Analyze Total' form in the INFORMS system. It includes sections for 'Verification' and 'Bid Action'. The 'Verification' section has dropdown menus for 'Is Bidder SBE Tier certified?' (set to NONE) and checkboxes for 'Bidder Eligible for Disabled VBE Preference?', 'Bidder qualifies for Local Preference?' (checked), and 'Bidder qualifies for Locally HQ Preference?'. The 'Bid Action' section has a dropdown menu for 'Bid Action' (set to NA) and a 'Reject Reason' field. Below these are fields for 'Award by Percent' and 'Hide Bid'. The form also displays a 'Calculated Evaluated Price' of 162,487,794.75 and a '5% Threshold' of 99.75. At the bottom, there are buttons for 'Recalculate', 'Save', 'Return to Search', and 'Unhide Bids'.

22.

Enter '100' into the **Award by Percent** field.


Analyze Total

Are you a certified Minority/Local/County Tier Small Business Enterprise? If not, please select 'None'

None None

Are you a locally certified Veteran Business Enterprise (VBE)?

Y N N

Verification

Is Bidder SBE Tier certified? NONE NONE

Bidder Eligible for Disabled VBE Preference? ☐ ☐

Bidder qualifies for Local Preference? ☒ ☐

Bidder qualifies for Locally HQ Preference? ☐ ☐

Calculated Evaluated Price 162,487,794.75 95.00

5% Threshold 99.75

10% Threshold 104.50

15% Threshold 109.25

Bid Action Award NA

Reject Reason

Award by Percent

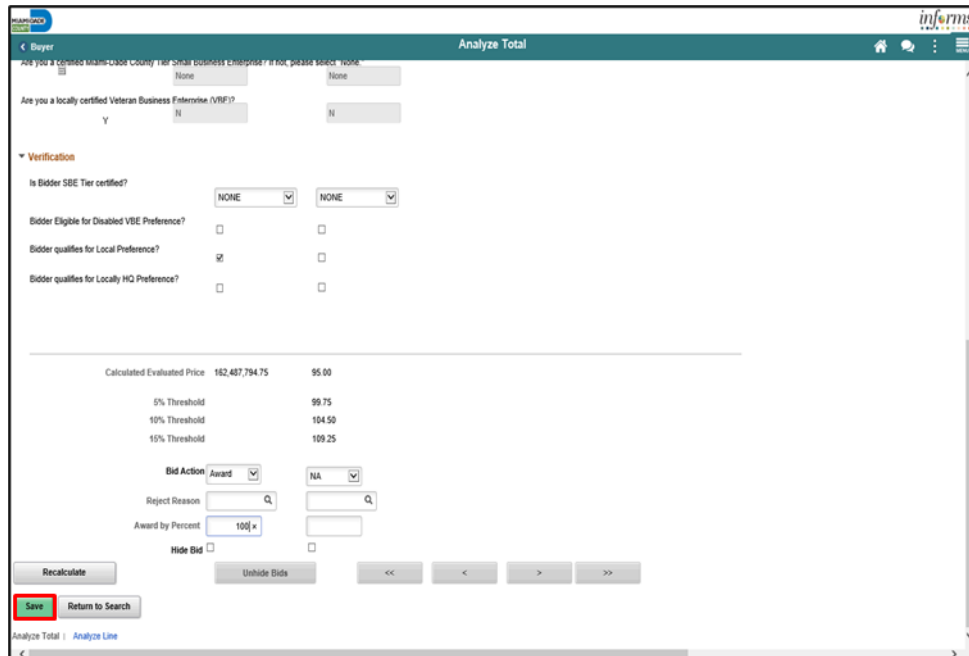
Hide Bid ☐ ☐

Recalculate Unhide Bids << < > >>

Save Return to Search

Analyze Total | Analyze Line

23.

Select the **Save** button.


Analyze Total

Are you a certified Minority/Local/County Tier Small Business Enterprise? If not, please select 'None'

None None

Are you a locally certified Veteran Business Enterprise (VBE)?

Y N N

Verification

Is Bidder SBE Tier certified? NONE NONE

Bidder Eligible for Disabled VBE Preference? ☐ ☐

Bidder qualifies for Local Preference? ☒ ☐

Bidder qualifies for Locally HQ Preference? ☐ ☐

Calculated Evaluated Price 162,487,794.75 95.00

5% Threshold 99.75

10% Threshold 104.50

15% Threshold 109.25

Bid Action Award NA

Reject Reason

Award by Percent 100%

Hide Bid ☐ ☐

Recalculate Unhide Bids << < > >>

Save Return to Search

Analyze Total | Analyze Line