



Miami-Dade County

Strategic Sourcing: Analyzing an Event by Line Job Aid

Version 1.0

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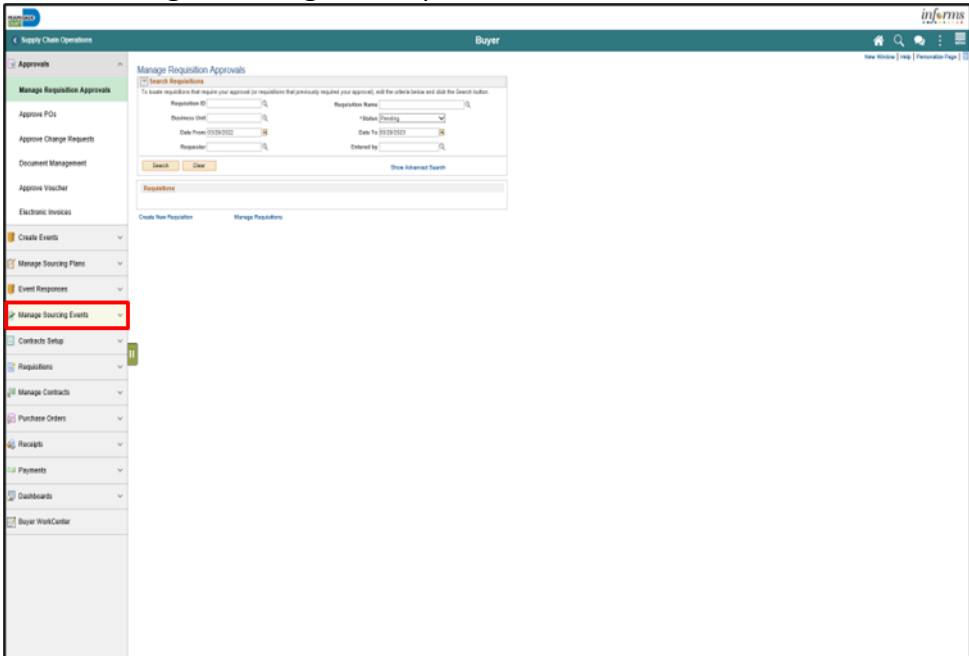
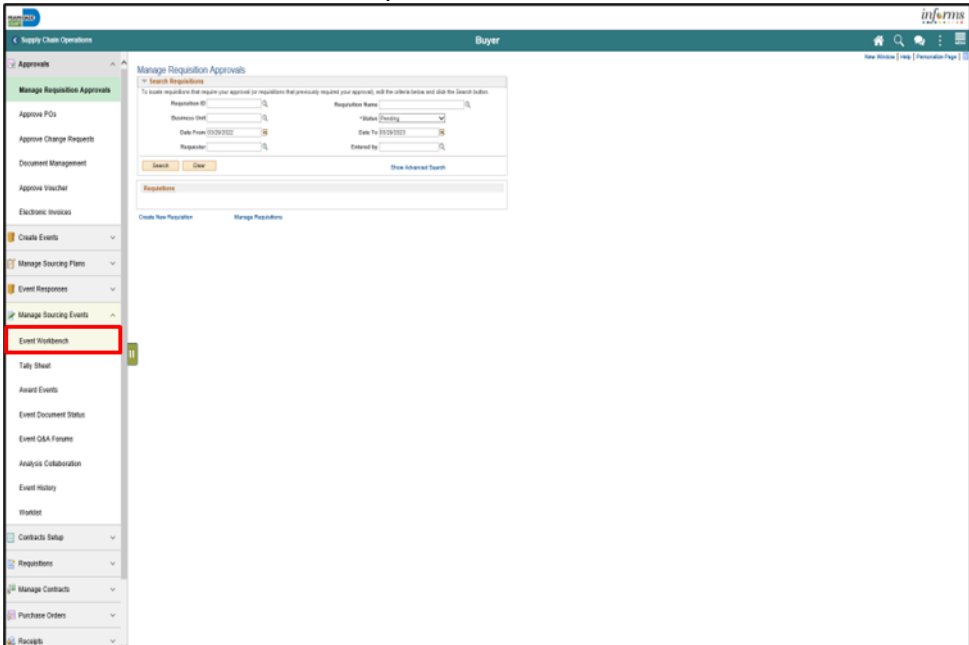
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PURPOSE AND DESCRIPTION

Purpose

This document explains the key activities involved in analyzing an event by line. 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 LINE

Step	Action
1.	Navigate to: Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer
2.	<p>Select Manage Sourcing Events pane.</p>  <p>The screenshot shows the Informa Buyer application interface. On the left, there is a sidebar with various navigation options. The 'Manage Sourcing Events' option is highlighted with a red rectangle. The main content area displays the 'Manage Requisition Approvals' section, which includes search filters and a list of requisitions.</p>
3.	<p>Select the Event Workbench pane.</p>  <p>The screenshot shows the Informa Buyer application interface. On the left, there is a sidebar with various navigation options. The 'Event Workbench' option is highlighted with a red rectangle. The main content area displays the 'Manage Requisition Approvals' section, which includes search filters and a list of requisitions.</p>

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

4.

Event Workbench

Search Criteria

Business Unit:

Event ID: From Start Date: To Start Date: Start With:

Created By: From End Date: To End Date: Sort Order:

Event Format: Category:

Event Type: Item ID:

Event Status: **Pending Award** Description: Plan Name:

☐ Only show Events I created
☐ Only show Active Events
☐ Use my search defaults

Legend

Search Results 1-25 of 1231

Event ID	Name	Format	Type	Unit	Status				
EVN001428	QNTS Sample	Buy	RFx	TP	Open				
EVN001429	Event Name	Buy	RFx	ID	Open				
EVN001430	NO2023 - Add Bid...	Buy	RFx	ID	Open				
EVN001431	TEST EVENT FOR CON...	Buy	RFx	TP	Open				
EVN001432	TEST	Buy	RFx	ID	Open				
EVN001433	Info	RFI	RFx	ID	Open				
EVN001434	Event Name	Buy	RFx	ID	Open				
EVN001435	K3K3	RFI	RFx	ID	Open				
EVN001436	Order - Test for n...	Buy	RFx	ID	Event Completed				
EVN001437	TEST	RFI	RFx	ID	RFI Completed				
EVN001438	Event Group Sample...	Buy	RFx	TP	Event Completed				
EVN001439	Event GROUP Sample...	Buy	RFx	TP	Event Completed				
EVN001440	TEST 2 DTPN CONSTR...	Buy	RFx	TP	Open				
EVN001441	Event Aggregate Sa...	Buy	RFx	TP	Pending Post Approval				
EVN001442	TEST 323	Buy	RFx	ID	Pending Award				
EVN001443	NO2023 - Add Bid...	Buy	RFx	ID	Event Completed				
EVN001444	EXHIBIT C	Buy	RFx	ID	Event Completed				
EVN001445	Order - Exhibit B	Buy	RFx	ID	Event Completed				
EVN001446	Test Bidder Null	Buy	RFx	ID	Event Completed				
EVN001447	EXHIBIT B	Buy	RFx	ID	Event Completed				

Select the **Analyze Bids** button.

5.

Event Workbench

Search Criteria

Business Unit:

Event ID: From Start Date: To Start Date: Start With:

Created By: From End Date: To End Date: Sort Order:

Event Format: Category:

Event Type: Item ID:

Event Status: **Pending Award** Description: Plan Name:

☐ Only show Events I created
☐ Only show Active Events
☐ Use my search defaults

Legend

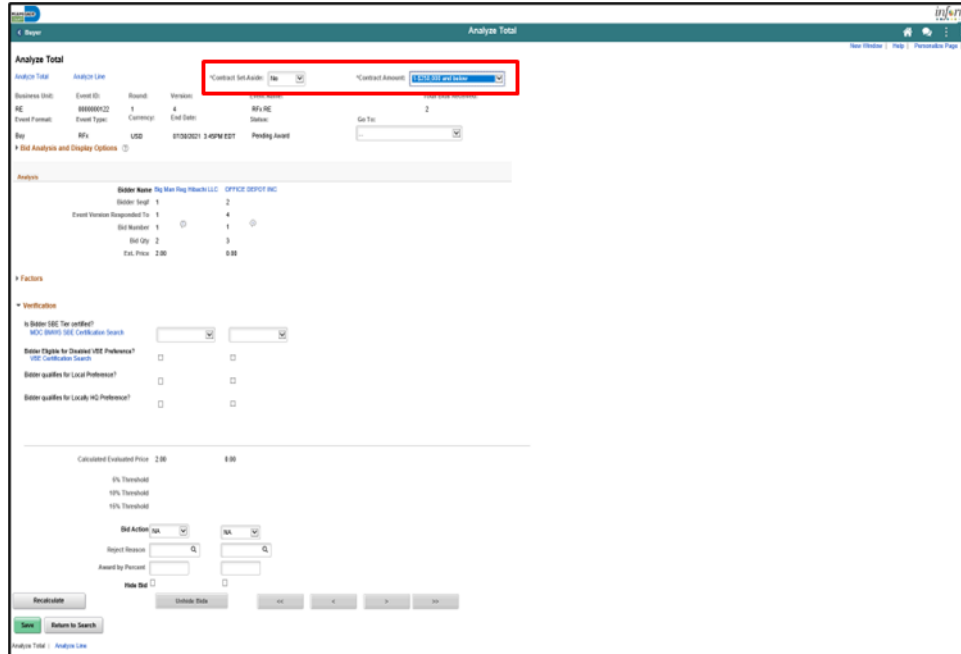
Search Results 1-25 of 1231

Event ID	Name	Format	Type	Unit	Status				
0000000001	No Bid	Buy	RFx	ID	Pending Award				
0000000002	No Bid	Buy	RFx	ID	Pending Award				
0000000003	Zero Dollar Price ...	Buy	RFx	AD	Pending Award				
0000000004	Merge Testing 7.3...	Buy	RFx	AD	Pending Award				
0000000005	Zero Priced Item	Buy	RFx	AD	Pending Award				
0000000006	RF's RE	Buy	RFx	RE	Pending Award				
0000000007	RF's RE for Mon...	Buy	RFx	RE	Pending Award				
0000000008	Test My Sourcing E...	Buy	RFx	ID	Pending Award				
0000000009	FB-01007	Buy	RFx	ID	Pending Award				
0000000010	Printed Case File ...	Buy	RFx	CL	Pending Award				
0000000011	RFP-01008	Buy	RFx	ID	Pending Award				
0000000012	RFG0002-SDTPW	Buy	RFx	ID	Pending Award				
0000000013	RF's - ITB with New...	Buy	RFx	ID	Pending Award				
0000000014	ITB with over 30 n...	Buy	RFx	ID	Pending Award				
0000000015	Invitation to Bid	Buy	RFx	ID	Pending Award				
0000000016	Event to test awar...	Buy	RFx	ID	Pending Award				
0000000017	TEST	Buy	RFx	AD	Pending Award				
0000000018	s17 R001000	Buy	RFx	AD	Pending Award				
0000000019	s17 R001000 TEST ...	Buy	RFx	AD	Pending Award				
0000000020	RF's Test RF's	Buy	RFx	ID	Pending Award				
0000000021	TEST MERGE FILE-AD	Buy	RFx	AD	Pending Award				

Update and review the details for the **Contract Set-Aside** and **Contract Amount** fields.

Note: This amount should initially be derived from the lowest raw bid.

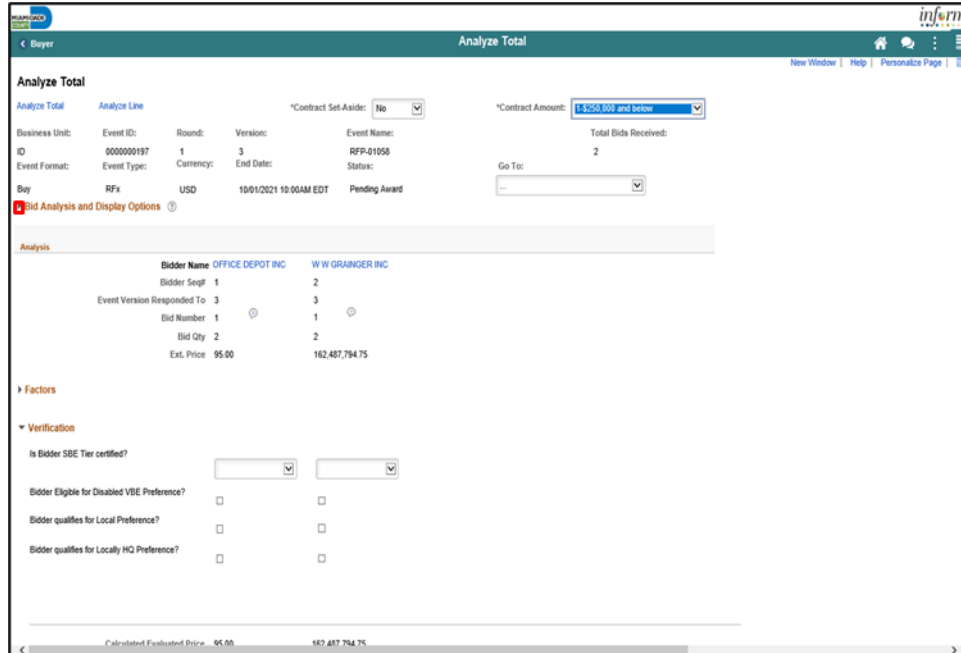
6.



The screenshot shows the 'Analyze Total' page in the INFORMS system. The 'Contract Set-Aside' field is set to 'No' and the 'Contract Amount' field is set to '\$1,500,000 and below'. The 'Bid Analysis and Display Options' button is visible at the bottom left of the analysis section.

[optional] Select the Expand section **Bid Analysis and Display Options** button.

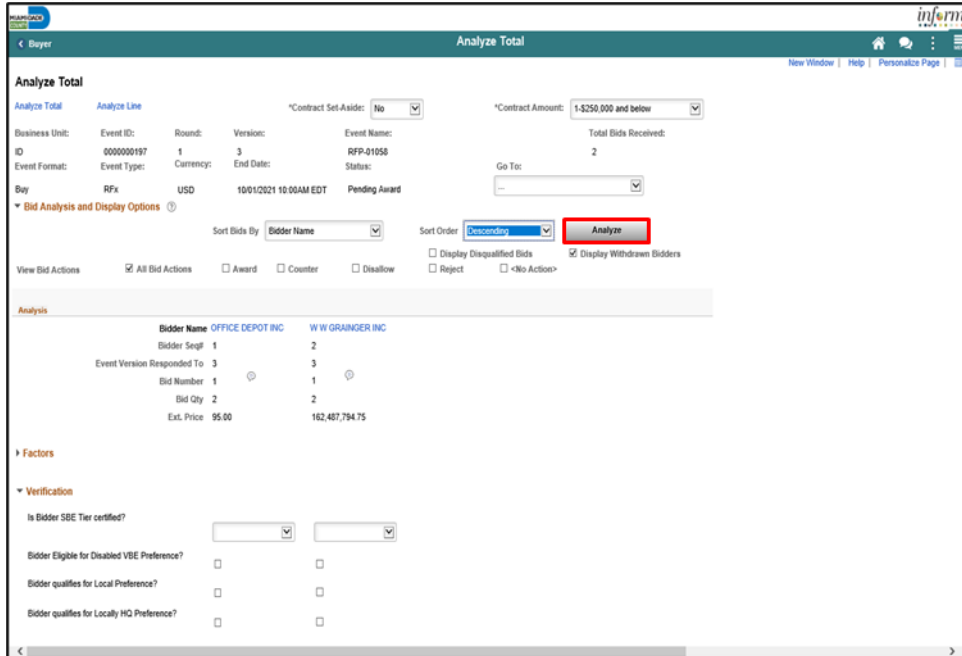
7.



The screenshot shows the 'Analyze Total' page with the 'Bid Analysis and Display Options' button expanded. The 'Contract Set-Aside' field is set to 'No' and the 'Contract Amount' field is set to '\$1,500,000 and below'. The 'Bid Analysis and Display Options' button is highlighted with a red box. The analysis section shows two bidders: OFFICE DEPOT INC and W W GRAINGER INC. The 'Bid Analysis and Display Options' button is located at the bottom left of the analysis section.

[optional] Select the applicable **Sort Bids By** and **Sort Order** options. Then select the **Analyze** button.

8.



Analyze Total

Business Unit: **Bay** Event ID: **000000197** Round: **1** Version: **3** Event Name: **RFP-01058** Total Bids Received: **2**

Event Format: **RFx** Event Type: **RFx** Currency: **USD** End Date: **10/01/2021 10:00AM EDT** Status: **Pending Award** Go To: **--**

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 Actions>

Analysis

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

Factors

Verification

Is Bidder SBE Tier certified?

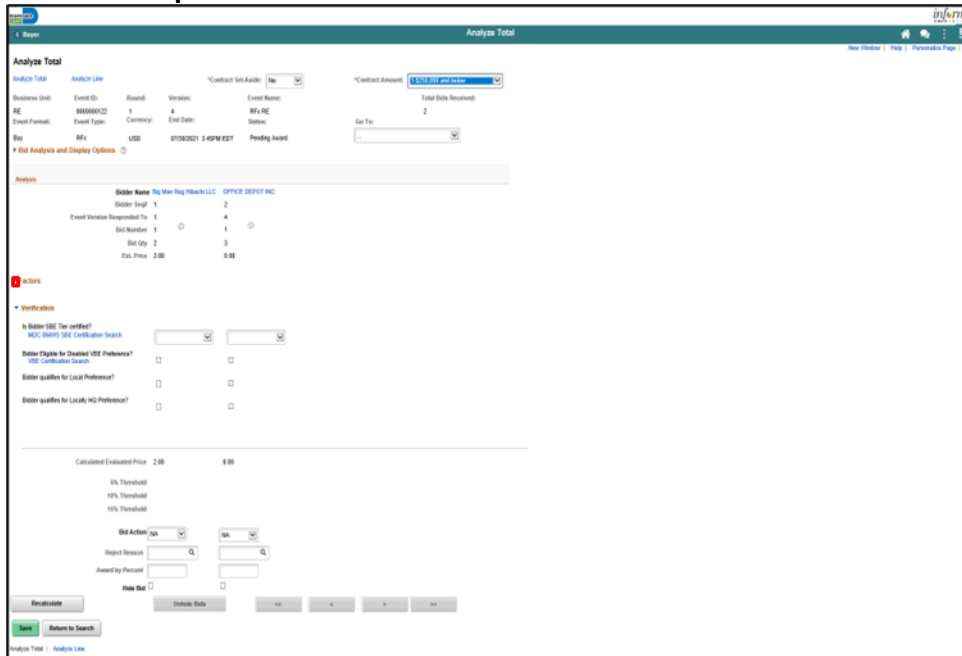
Bidder Eligible for Disabled VBE Preference? ☐ ☐

Bidder qualifies for Local Preference? ☐ ☐

Bidder qualifies for Locally HQ Preference? ☐ ☐

Select the **Expand section Factors** button.

9.



Analyze Total

Business Unit: **Bay** Event ID: **000000197** Round: **1** Version: **4** Event Name: **RFP-01058** Total Bids Received: **2**

Event Format: **RFx** Event Type: **RFx** Currency: **USD** End Date: **10/01/2021 10:00AM EDT** Status: **Pending Award** Go To: **--**

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 Actions>

Analysis

Bidder Name	Big Man Reg Wholesale LLC	OFFICE DEPOT INC
Bidder Seq#	1	2
Event Version Responded To	1	4
Bid Number	1	1
Bid Qty	2	3
Est. Price	2.00	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 Estimated Price: **2.00** **0.00**

9% Threshold 10% Threshold 15% Threshold

Bid Action:

Report Reason:

Award by Percent:

Hide Bid ☐

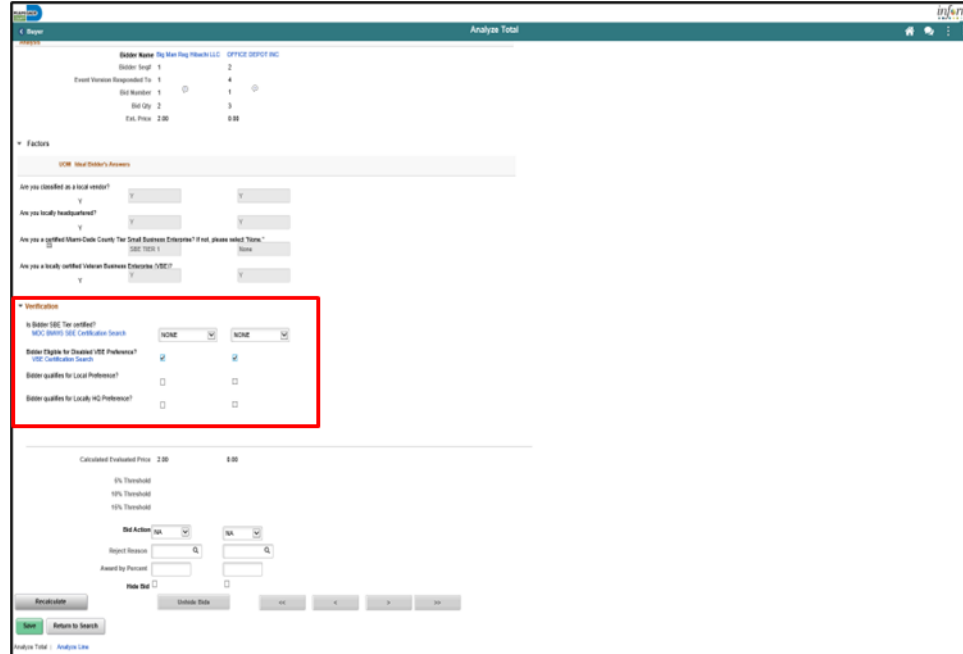
Recalculate **Update Data** **Back** **Forward** **Print**

Save **Return to Search**

Analyze Total **Analyze Line**

10.

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



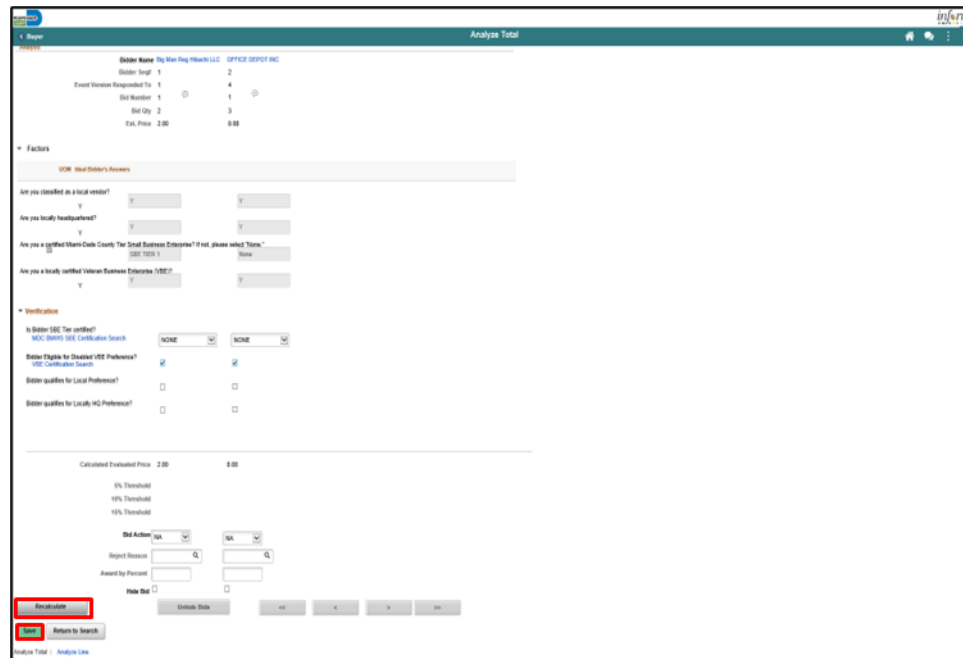
The screenshot shows the 'Analyze Total' interface for a bid analysis. The 'Verification' section is highlighted with a red box. It contains the following fields:

- Is Bidder SBE Tier certified?** (Dropdown menu, currently set to 'NONE')
- Is Bidder SBE Tier certified?** (Dropdown menu, currently set to 'NONE')
- Bidder Eligible for Disabled VET Preference?** (Checkbox, checked)
- Bidder Eligible for Local Preference?** (Checkbox, unchecked)
- Bidder Eligible for Locally HQ Preference?** (Checkbox, unchecked)

Below the Verification section, there are fields for 'Calculated Evaluated Price' (2.00), '5% Threshold', '10% Threshold', '15% Threshold', 'Bid Action' (dropdown, set to 'NA'), 'Report Reason' (text input), and 'Award by Person' (text input). At the bottom, there are buttons for 'Recalculate', 'Save', 'Return to Search', and 'Analyze Line'.

11.

Select the **Recalculate** button for each line.
Select the **Save** button.



The screenshot shows the same 'Analyze Total' interface as in step 10. The 'Recalculate' button and the 'Save' button are highlighted with red boxes. The 'Recalculate' button is located at the bottom left of the interface, and the 'Save' button is located at the bottom right of the interface.

12.

Select the **Analyze Line** link.

Bid
Analyze Total

Contract Info:		Contract Info Available:		Contract Amount:		Total Bids Received:	
Contract Total:	Submission:	Contract Set Aside:	Date:	Contract Amount:	\$ 629,000 and below		

Business Unit:	Event ID:	Round:	Version:	Event Master:
RH	888888XZ	1	4	M's HQ
Event Format:	Event Type:	Currency:	End Date:	Status:
			Go To:	2

Bid: M's USD 07/26/2021 1:45PM EDT Pending Award - [dropdown]

+ Bid Analysis and Display Options

Bidders

Bidder Name	Top View	Watch List	OFFICE DEPUTY INC.
Bidder Single	1	2	
Event Version Responded To	1	4	
Bid Number	1	1	
Bid Qty	2	3	
Est. Price	2.00	0.00	

Factors

USOR What Bidder's Answers

Are you identified as a local vendor?

Y [input type="text"/> Y [input type="text"/>

Are you locally headquartered?

Y [input type="text"/> Y [input type="text"/>

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

SBE YES/N [input type="text"/> None [input type="text"/>

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

V [input type="text"/> Y [input type="text"/>

Verification

Is Bidder SBC Ter certified?

NIC: Bureau Size Contribution Search [dropdown] [dropdown]

Bidder Eligible to Showcase VET Preference?

VSE Contribution Search [input type="checkbox"/> [input checked="" type="checkbox"/>

Bidder qualifies for Local Preference?

[input type="checkbox"/> [input checked="" type="checkbox"/>

Bidder qualifies for Locals HQ Preference?

[input type="checkbox"/> [input checked="" type="checkbox"/>

Calculated Evaluation Price:	1.00	0.00
5% Threshold		
10% Threshold		
15% Threshold		

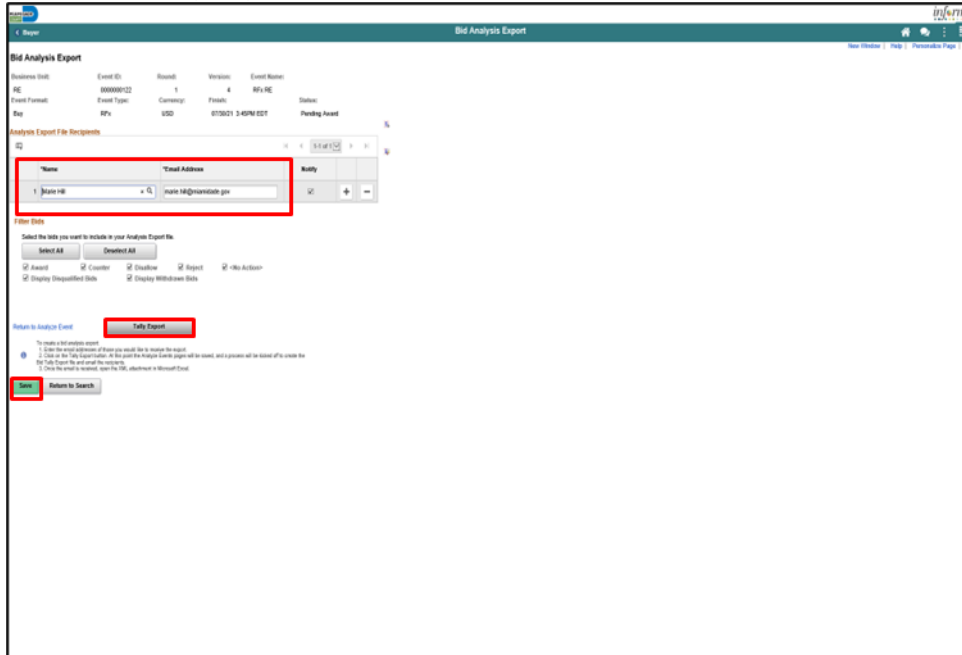
Bid Action: [button: OK] [button: X]

13.

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

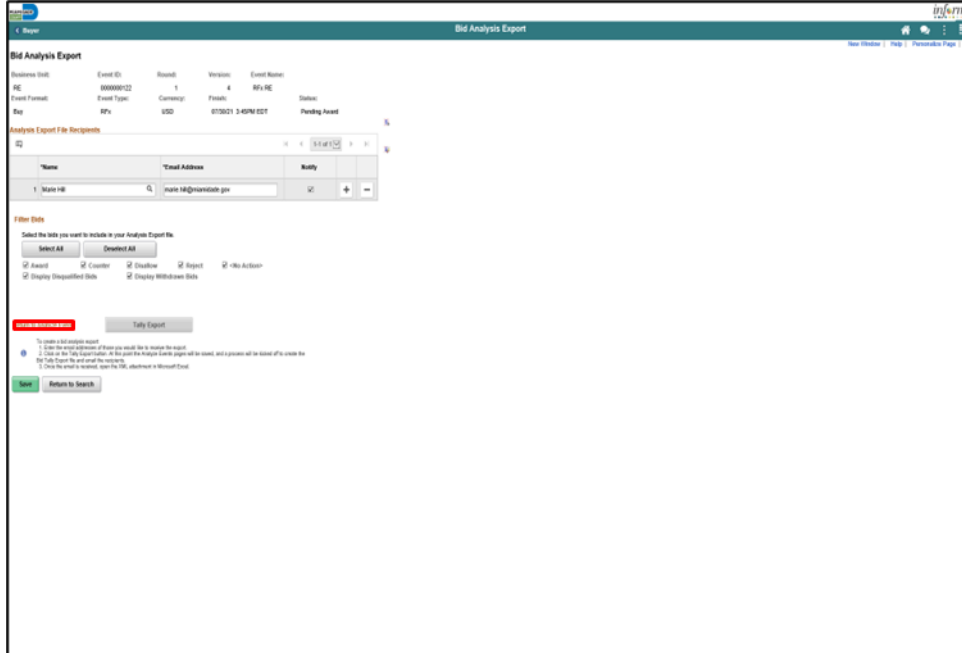
[illegible]

14. Input the applicable details for the **Export Recipient**.
 Select the **Save** button.
 Select the **Tally Export** button.



The screenshot shows the 'Bid Analysis Export' page. At the top, there's a header with 'informatics' and navigation links. Below the header, there's a section for 'Bid Analysis Export' with a table of event details. The table has columns for Business Unit, Event ID, Rounds, Versions, Event Name, Event Format, Event Type, Currency, Funds, Status, and Pending Award. The data row shows 'RE', '000000122', '1', '4', 'RFA RE', 'Event Format', 'Event Type', 'Currency', 'Funds', 'Status', and 'Pending Award'. Below the table, there's a section for 'Analysis Export File Recipients' with a table that has columns for Name, Email Address, and Notify. The data row shows '1', 'John H', 'john.h@informa.com', and 'Notify'. A red box highlights the 'Name' and 'Email Address' fields. Below the table, there's a section for 'Filter Data' with a 'Select the data you want to include in your Analysis Export file' section. There are buttons for 'Select All' and 'Deselect All'. Below that, there are checkboxes for 'Award', 'Counter', 'Drawdown', 'Report', 'No Action', 'Display Unqualified Data', and 'Display Withdrawn Data'. At the bottom, there's a 'Return to Analyze Event' section with a 'Tally Export' button highlighted in red. Below that, there's a 'Save' button highlighted in red and a 'Return to Search' button.

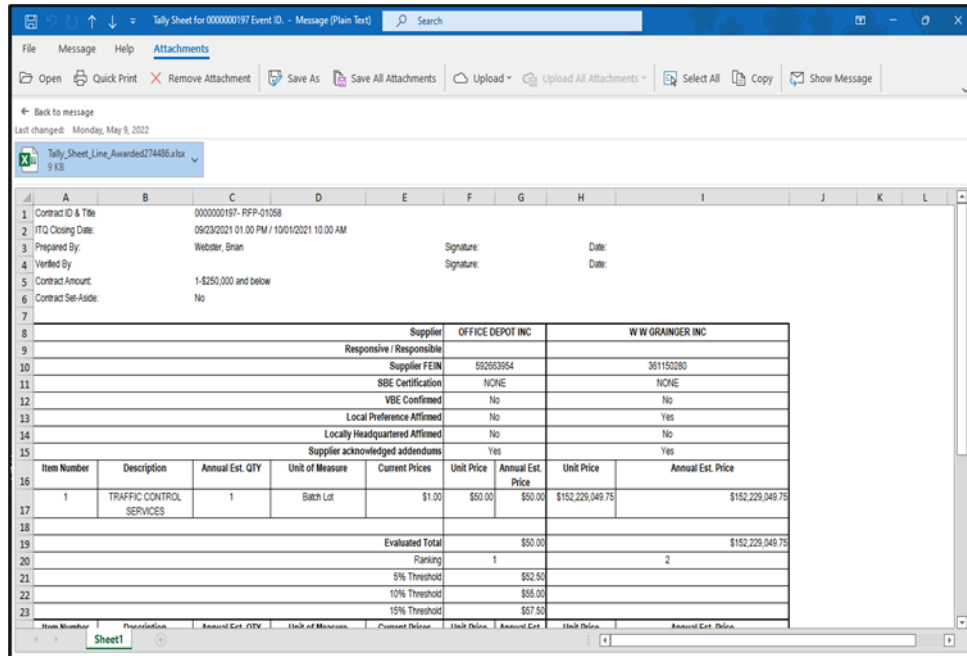
15. Select the **Return to Analyze Event** link.



The screenshot shows the 'Bid Analysis Export' page. At the top, there's a header with 'informatics' and navigation links. Below the header, there's a section for 'Bid Analysis Export' with a table of event details. The table has columns for Business Unit, Event ID, Rounds, Versions, Event Name, Event Format, Event Type, Currency, Funds, Status, and Pending Award. The data row shows 'RE', '000000122', '1', '4', 'RFA RE', 'Event Format', 'Event Type', 'Currency', 'Funds', 'Status', and 'Pending Award'. Below the table, there's a section for 'Analysis Export File Recipients' with a table that has columns for Name, Email Address, and Notify. The data row shows '1', 'John H', 'john.h@informa.com', and 'Notify'. Below the table, there's a section for 'Filter Data' with a 'Select the data you want to include in your Analysis Export file' section. There are buttons for 'Select All' and 'Deselect All'. Below that, there are checkboxes for 'Award', 'Counter', 'Drawdown', 'Report', 'No Action', 'Display Unqualified Data', and 'Display Withdrawn Data'. At the bottom, there's a 'Return to Analyze Event' section with a 'Tally Export' button. Below that, there's a 'Save' button and a 'Return to Search' button. The 'Return to Analyze Event' link is highlighted in red.

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

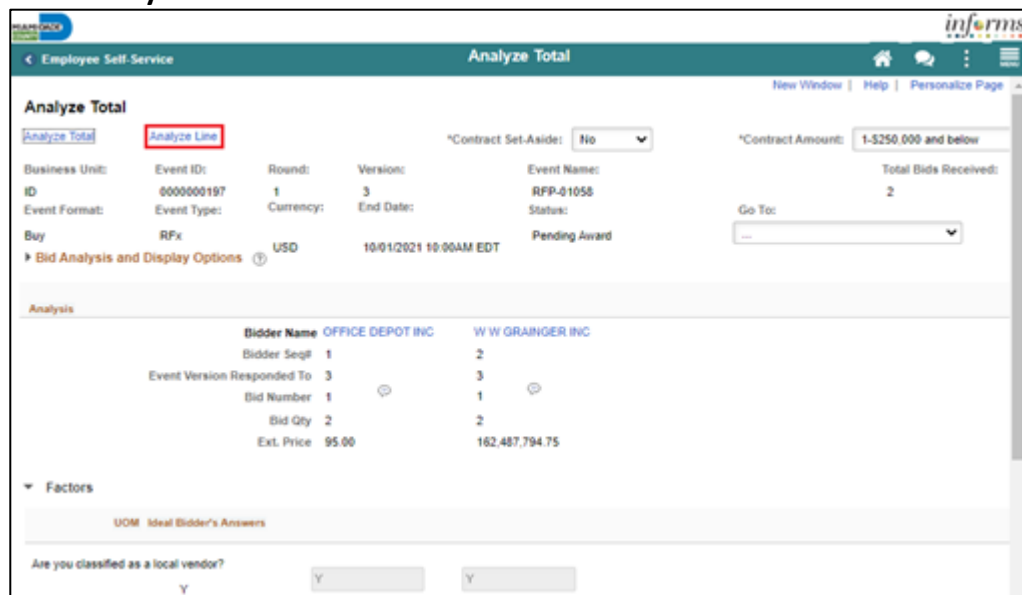
16.



Item Number	Description	Annual Est. QTY	Unit of Measure	Current Prices	Unit Price	Annual Est. Price	Unit Price	Annual Est. Price
1	TRAFFIC CONTROL SERVICES	1	Batch Lot	\$1.00	\$50.00	\$50.00	\$152,229,049.75	\$152,229,049.75
Evaluated Total						\$50.00		\$152,229,049.75
Ranking						1		2
5% Threshold						\$52.50		
10% Threshold						\$55.00		
15% Threshold						\$57.50		

Select the **Analyze Line** link.

17.



Bidder Name	OFFICE DEPOT INC	W W GRAINGER 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

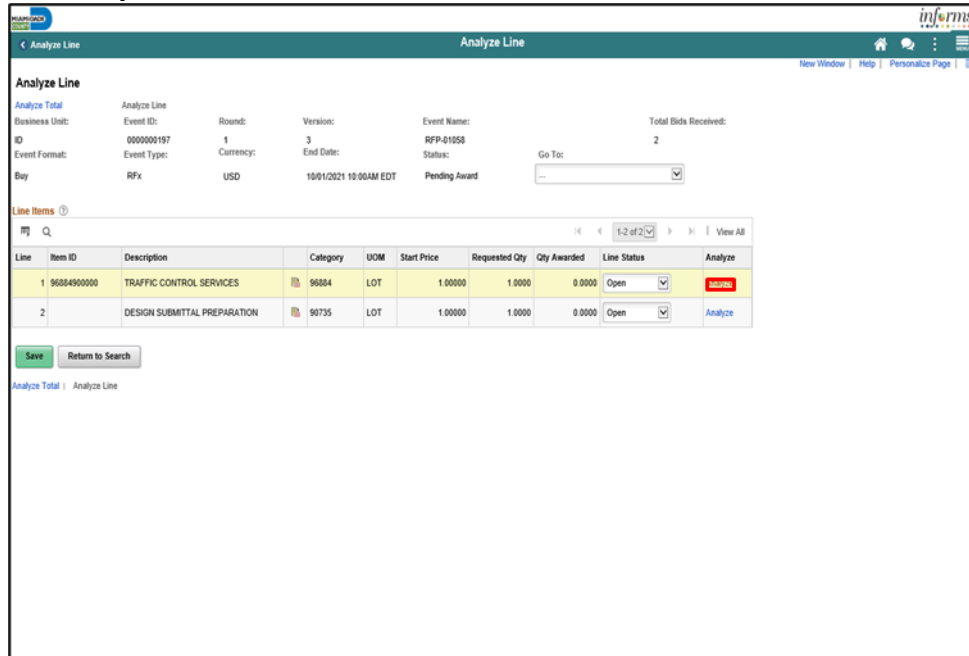
Factors

UOM Ideal Bidder's Answers

Are you classified as a local vendor?

Y ☐ Y ☐

18.

Select the **Analyze** link.


Analyze Line

Analyze Line

Business Unit: Analyze Line
 Event ID: 000000197
 Round: 1
 Version: 3
 Event Name: RFP-01555
 Total Bids Received: 2

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

Go To: --

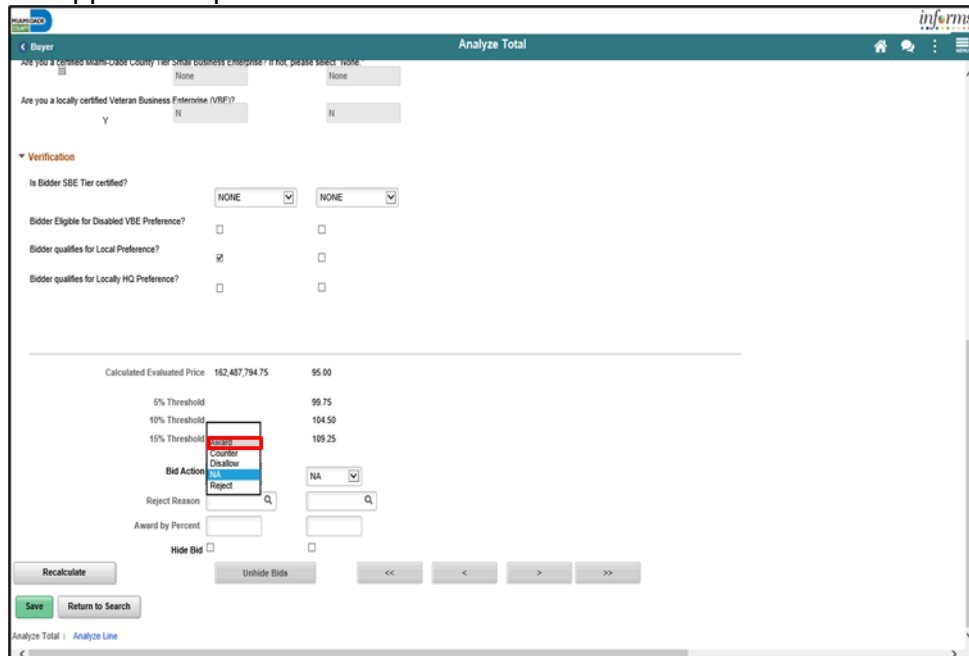
Line Items

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Line Status	Analyze
1	96804900000	TRAFFIC CONTROL SERVICES	96804	LOT	1.00000	1.0000	0.0000	Open	Analyze
2		DESIGN SUBMITTAL PREPARATION	90735	LOT	1.00000	1.0000	0.0000	Open	Analyze

Save Return to Search

Analyze Total | Analyze Line

19.

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


Analyze Total

Are you a certified Minority-Owned Company? None

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

Reject Reason

Award by Percent

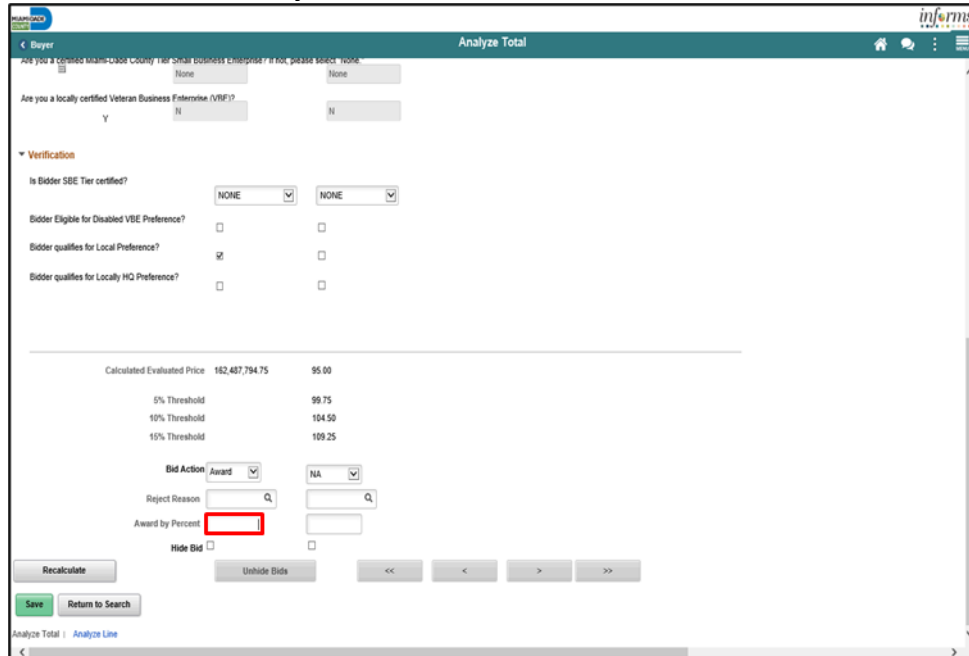
Hide Bid ☐

Recalculate Unhide Bids << < > >>

Save Return to Search

Analyze Total | Analyze Line

20.

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


Analyze Total

Are you a certified minority-owned company tier small business enterprise or not please select: None

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

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:

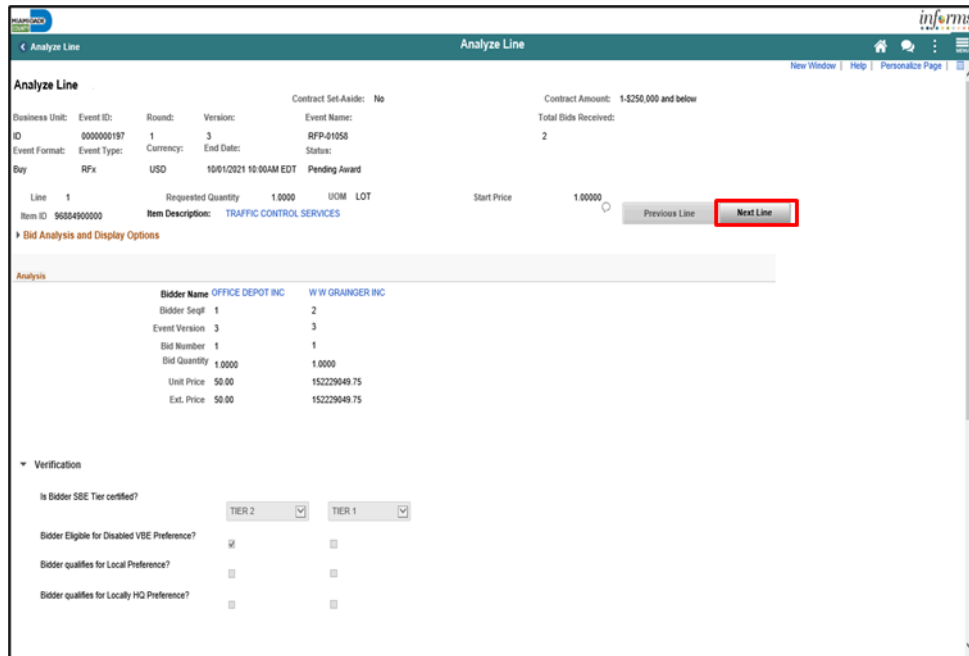
Hide Bid ☐

Recalculate Unhide Bids << < > >>

Save Return to Search

Analyze Total | Analyze Line

21.

Select the **Next Line** button.


Analyze Line

Business Unit: Event ID: Round: Version: Event Name: Contract Set-Aside: No Contract Amount: 1-\$250,000 and below

ID: 0000000197 1 3 RFP-01058 Total Bids Received: 2

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

Buy RFPs USD 10/01/2021 10:00AM EDT

Line 1 Requested Quantity: 1.0000 UOM LOT Start Price: 1.0000

Item ID: 96084900000 Item Description: TRAFFIC CONTROL SERVICES

Previous Line Next Line

Bid Analysis and Display Options

Analysis	
Bidder Name	OFFICE DEPOT INC W W GRANGER INC
Bidder Segt	1 2
Event Version	3 3
Bid Number	1 1
Bid Quantity	1.0000 1.0000
Unit Price	50.00 152229049.75
Ext. Price	50.00 152229049.75

Verification

Is Bidder SBE Tier certified? TIER 2 TIER 1

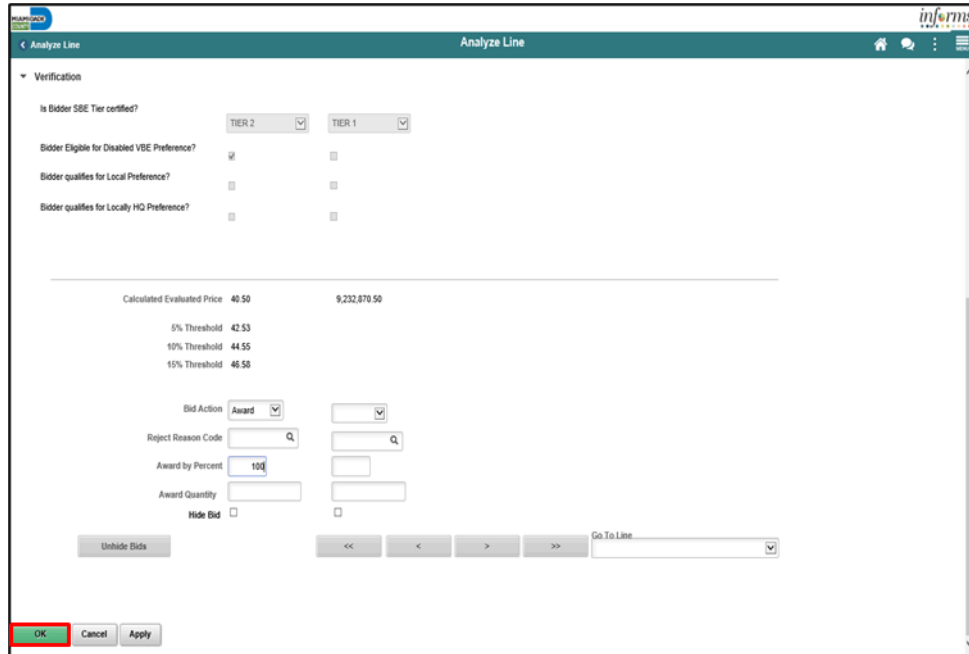
Bidder Eligible for Disabled VBE Preference? ☒

Bidder qualifies for Local Preference? ☐

Bidder qualifies for Locally HQ Preference? ☐

Note: Repeat steps 17-21 for each line.

22.

Select the **OK** button.


Analyze Line

Verification

Is Bidder SBE Tier certified? TIER 2 TIER 1

Bidder Eligible for Disabled VBE Preference? ☒ ☐

Bidder qualifies for Local Preference? ☐ ☐

Bidder qualifies for Locally HQ Preference? ☐ ☐

Calculated Evaluated Price 40.50 9,232,870.50

5% Threshold 42.53

10% Threshold 44.55

15% Threshold 46.58

Bid Action Award

Reject Reason Code

Award by Percent 100

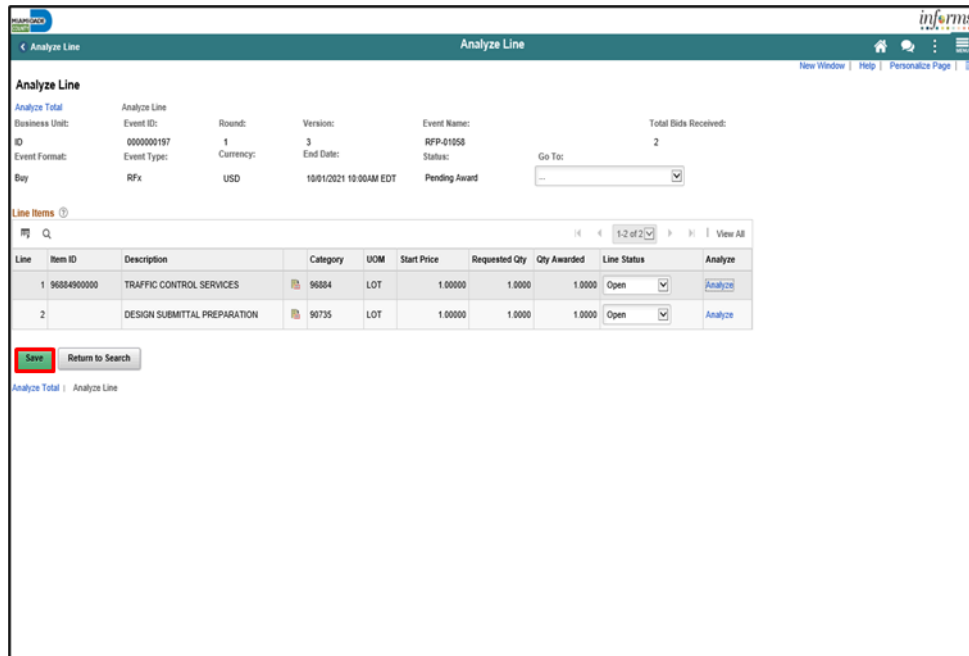
Award Quantity

Hide Bid ☐

Unhide Bids << < > >> Go To Line

OK Cancel Apply

23.

Select the **Save** button.


Analyze Line

Business Unit: Event ID: Round: Version: Event Name: Total Bids Received: 2

ID: 0000000197 Event Type: 3 End Date: RFP-01958 Status: Go To:

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

Line Items

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Line Status	Analyze
1	96004900000	TRAFFIC CONTROL SERVICES	96004	LOT	1.00000	1.0000	1.0000	Open	Analyze
2		DESIGN SUBMITTAL PREPARATION	90735	LOT	1.00000	1.0000	1.0000	Open	Analyze

Save Return to Search

Analyze Total | Analyze Line