



Miami-Dade County

Strategic Sourcing: Create a New Buy Event

Version 1.0

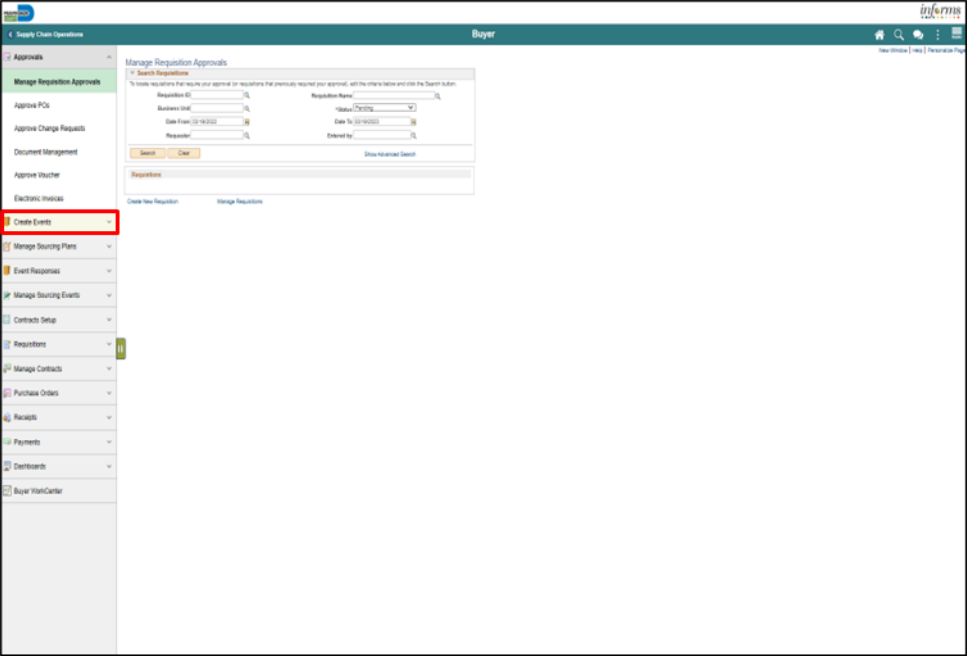
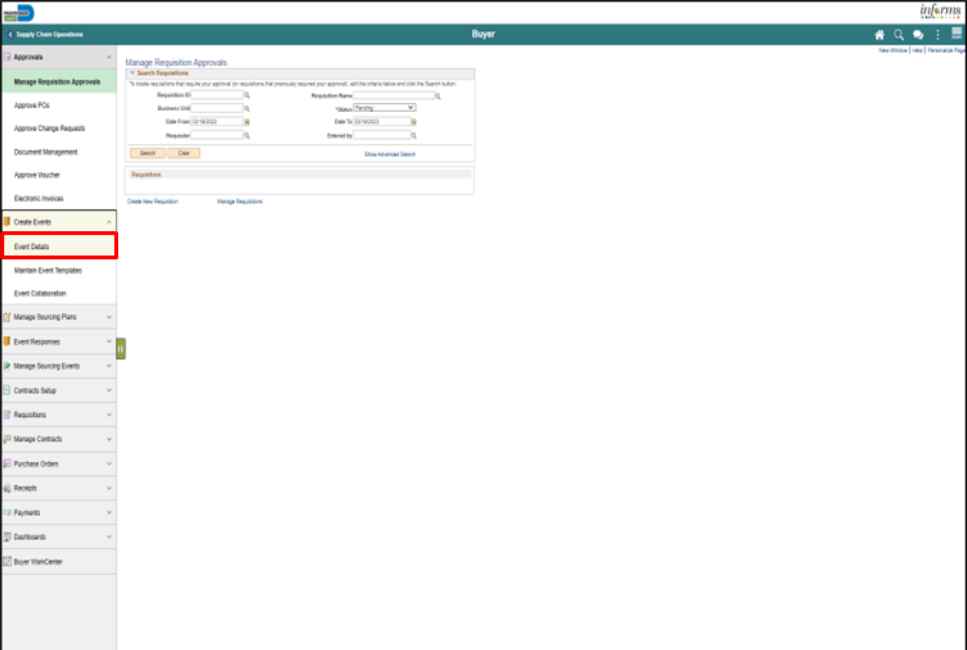
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PURPOSE AND DESCRIPTION

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

CREATE A NEW BUY EVENT

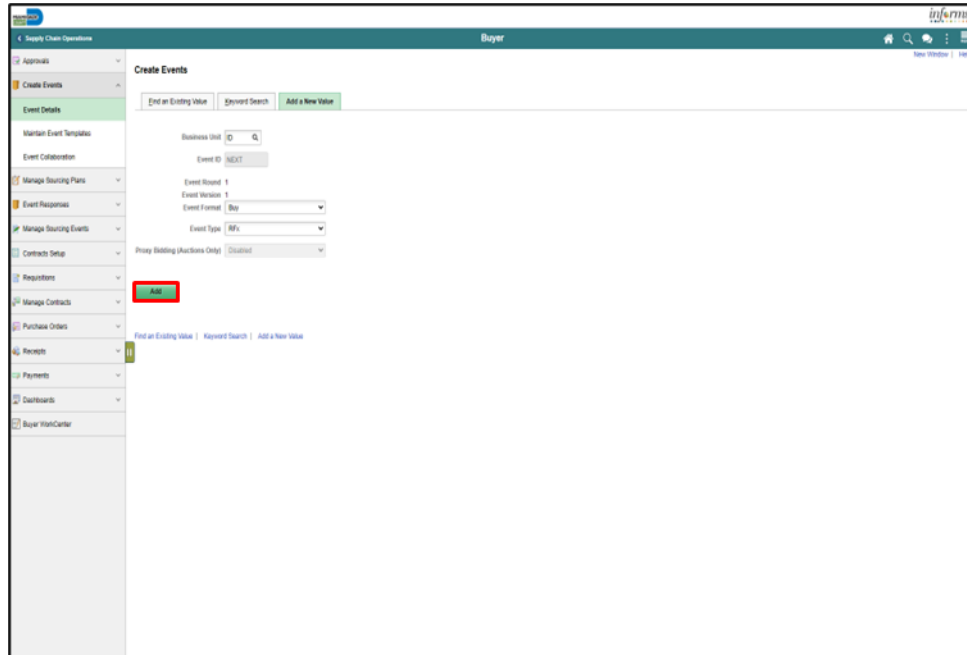
Step	Action
1.	Navigate to Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer
2.	<p>Select the Create Events option in the navigation pane.</p> 
3.	<p>Select the Event Details pane.</p> 

Confirm the event details.

- **Event Format: Buy**
- **Event Type: RFx**

Select the **Add** button.

4.



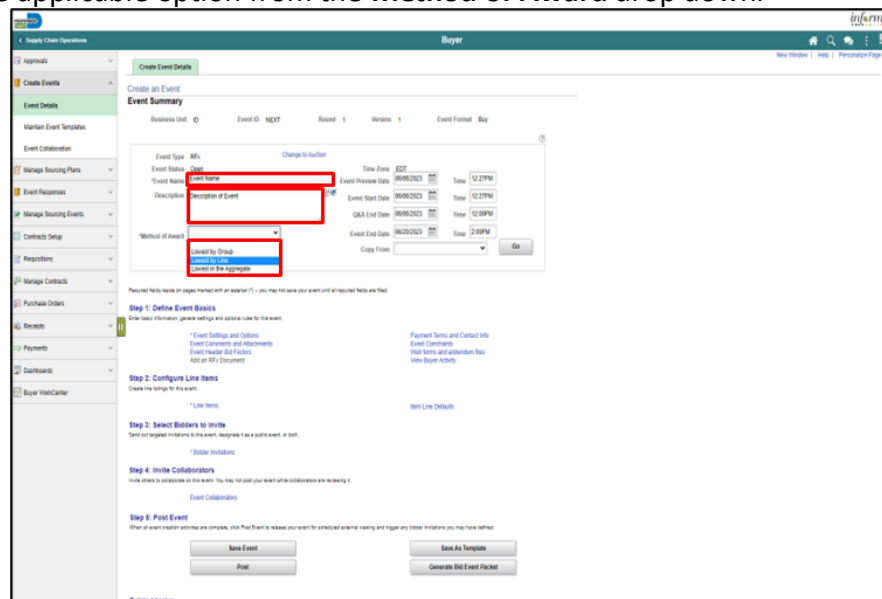
Enter the desired information into the **Event Name** field.

Enter the desired information into the **Description** field.

Note: The **Description** field is to be used for detailed information that won't otherwise fit in the **Event Name** field.

Select the applicable option from the **Method of Award** drop down.

5.



Event Preview Date: The date that the event is available to potential bidders, allowing for review of the event, question submissions, and saving of bids, which can be posted as soon as the event starts.

Event Start Date: The date when the bidders/suppliers can begin to post bids for the event.

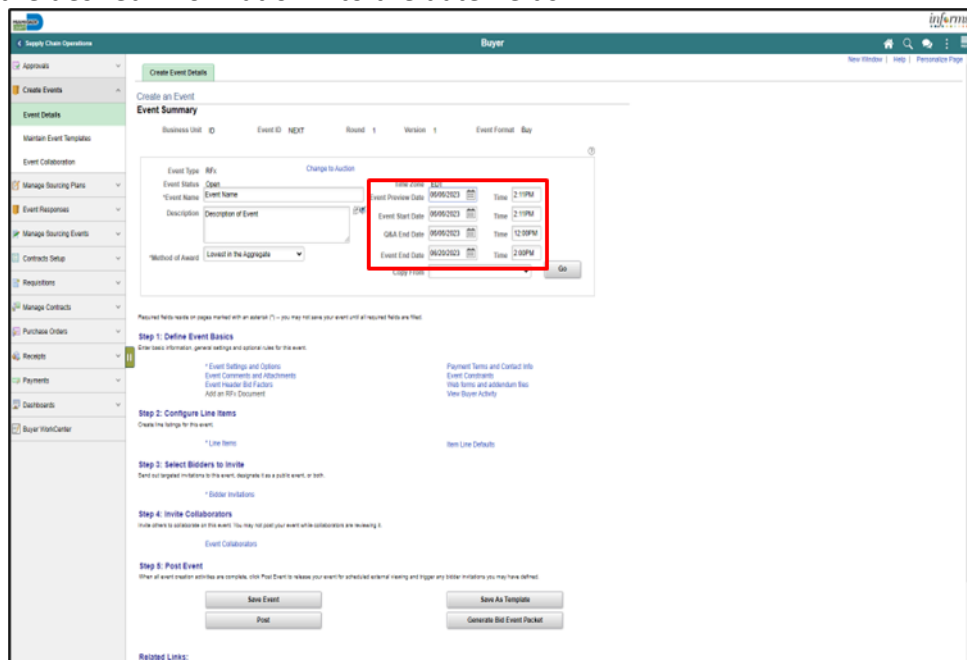
Q&A End Date: The date after which bidders/suppliers can no longer submit questions via the Discussion Forum to the **INFORMS** buyers. Be sure the time is set for 12:00 PM.

Event End Date: The date when the bidding closes. Be sure the time is set for 2:00 PM.

Note: The **Event Preview Date** and the **Event Start Date** should be the same.

Enter the desired information into the date fields.

6.



Event Summary

Field	Value
Event Type	RFx
Event Name	06/09/2023
Description	Description of Event
Event Preview Date	06/09/2023 2:00 PM
Event Start Date	06/09/2023 2:00 PM
Q&A End Date	06/09/2023 12:00 PM
Event End Date	06/20/2023 2:00 PM

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

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

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

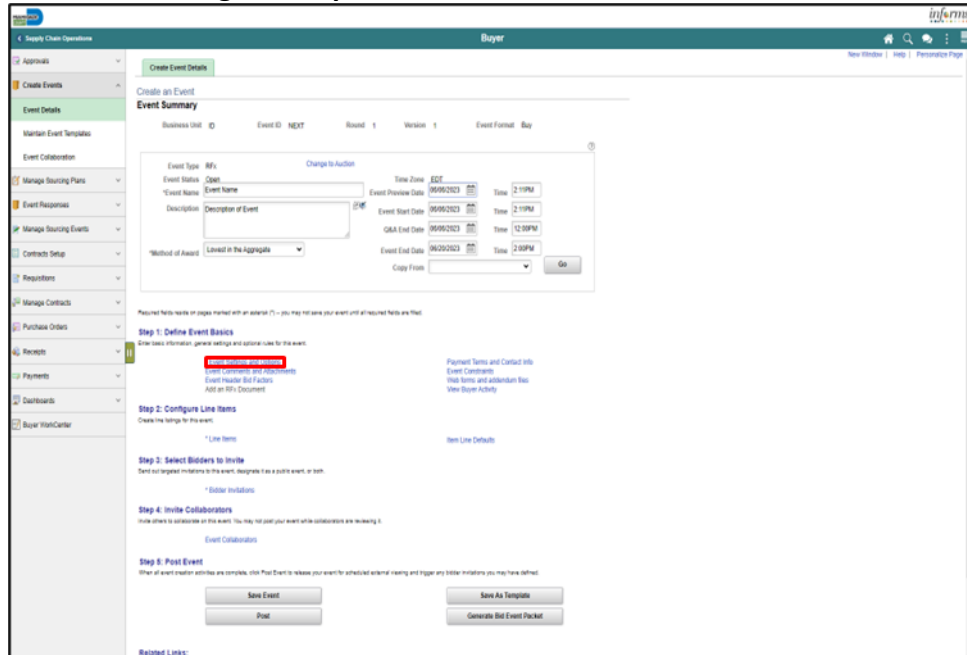
Step 4: Invite Collaborators
Invite others to collaborate on this event. You may not post your event until collaborators are reviewing it.

Step 5: Post Event
After 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.

Buttons: Save Event, Post, Save As Template, Generate Bid Event Packet

Select the **Event Settings and Options** link.

7.

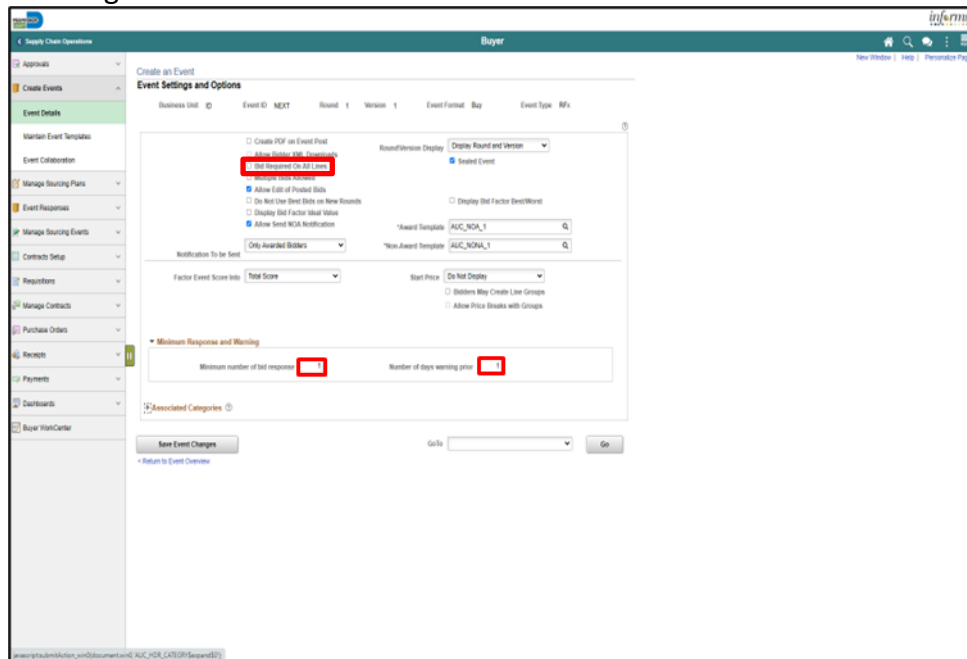


Enter the desired information into the **Minimum number of bid response** field and **Number of days warning prior** field.

Select the **Bid Required on All Lines** checkbox if all lines of the event require a bid.

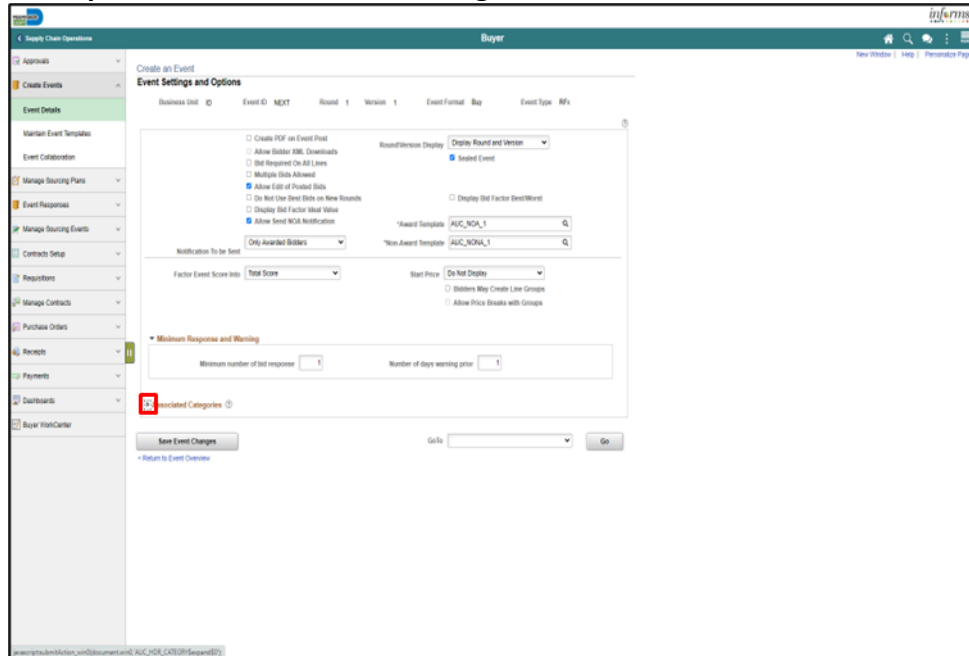
Note: Selecting this will remove the bidder's "No Bid" checkbox for all lines.

8.



Select the **Expand section Associated Categories** button.

9.



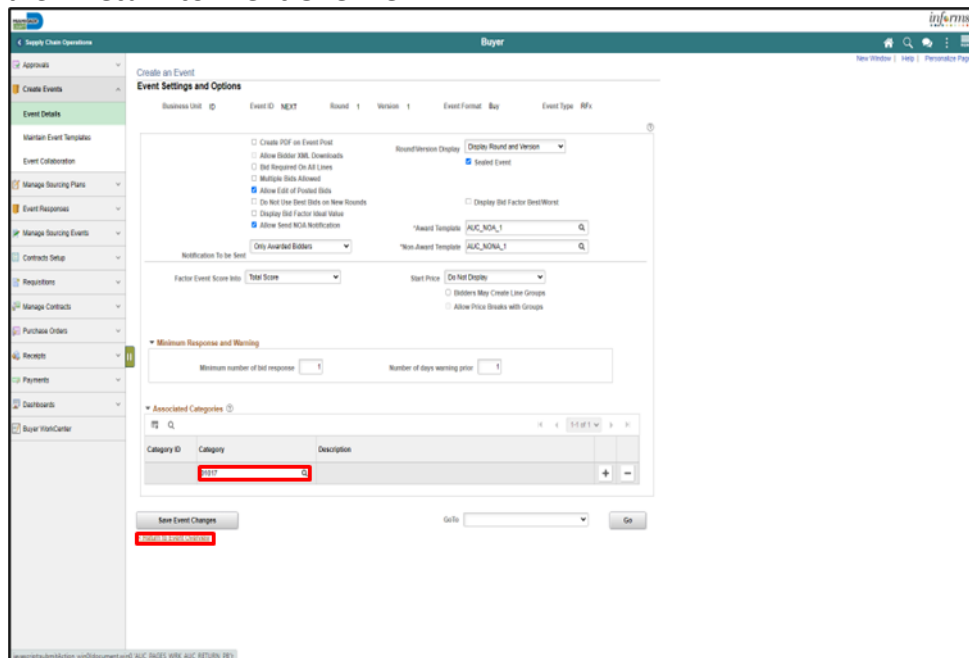
The screenshot shows the 'Create an Event' page in the Buyer interface. The 'Associated Categories' section is expanded, and the 'Expand section Associated Categories' button is highlighted with a red box. The page includes various settings for the event, such as 'Event Details', 'Event Collaboration', 'Manage Sourcing Plans', 'Event Responses', 'Manage Sourcing Events', 'Contracts Setup', 'Requirements', 'Manage Contracts', 'Purchase Orders', 'Receipts', 'Payments', 'Dashboards', and 'Buyer WorkCenter'.

Category Code: The category code associated with the event. Bidders/Suppliers will be searched based on the associated categorization.

Enter or search for the desired information in the **Category** field.

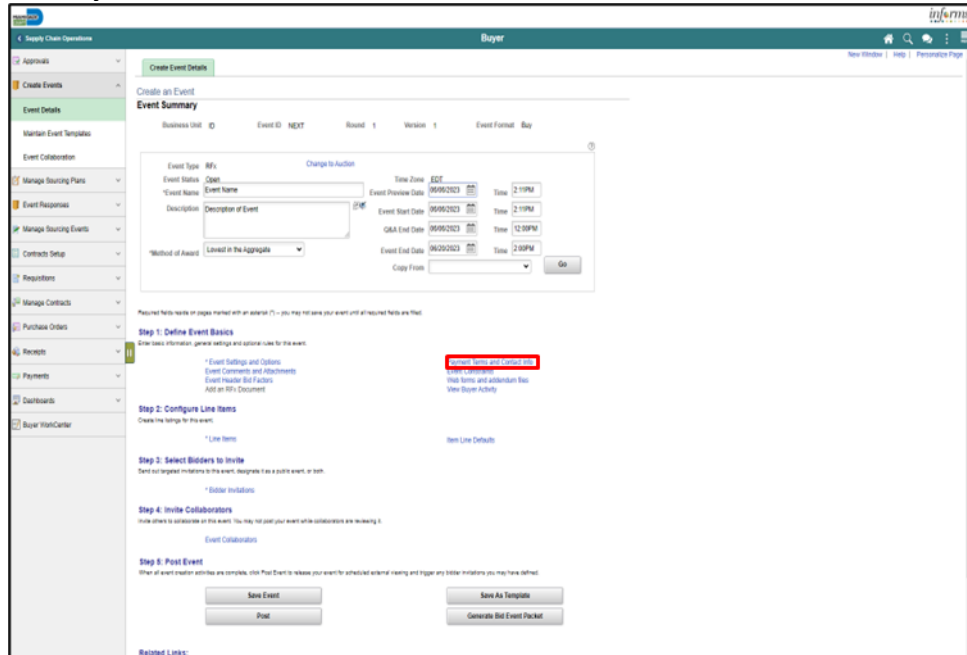
Select the **< Return to Event Overview** link.

10.



The screenshot shows the 'Create an Event' page in the Buyer interface. The 'Associated Categories' section is expanded, and the 'Category' field is highlighted with a red box. The 'Return to Event Overview' link is also highlighted with a red box. The page includes various settings for the event, such as 'Event Details', 'Event Collaboration', 'Manage Sourcing Plans', 'Event Responses', 'Manage Sourcing Events', 'Contracts Setup', 'Requirements', 'Manage Contracts', 'Purchase Orders', 'Receipts', 'Payments', 'Dashboards', and 'Buyer WorkCenter'.

11.

Select the **Payment Terms and Contact Info** link.


Payment & Currency Information

Currency: USD Exchange Rate: 1.0000

Pay Method: Credit Card

Payment Terms: 100%

Bill Address: 2542210001

Phone: 705-955-5555

Event ID: 00000000

Event Contact

Contact Name: Heli Marie

Email ID: hmarie@gmail.com

Phone: 705-955-5555

Additional Contacts

User ID	Email ID
ADROCKON	change_mrs@enr.com

[Return to Event Overview](#)

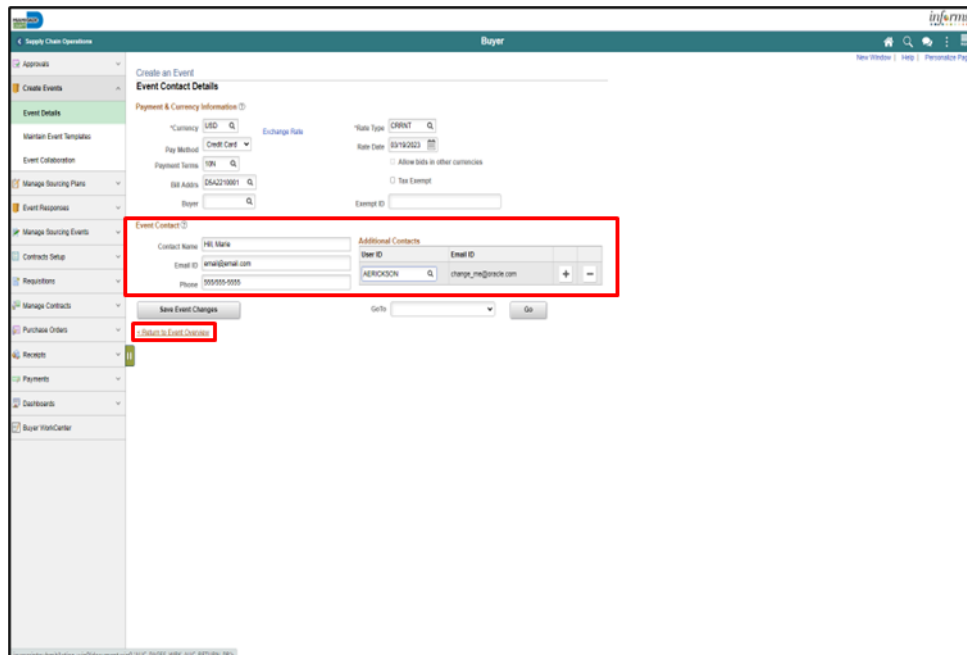
12.

Enter or correct **Event Contact** details.

- **Contact Name**
- **Email ID**
- **Phone**

Enter or search for **Additional Contacts**.

- **User ID** to be notified of **Event Q&A Forum** questions.

Note: If any questions are asked by bidders, Clerk of the Board will be notified.Select the **< Return to Event Overview** link.


Payment & Currency Information

Currency: USD Exchange Rate: 1.0000

Pay Method: Credit Card

Payment Terms: 100%

Bill Address: 2542210001

Phone: 705-955-5555

Event ID: 00000000

Event Contact

Contact Name: Heli Marie

Email ID: hmarie@gmail.com

Phone: 705-955-5555

Additional Contacts

User ID	Email ID
ADROCKON	change_mrs@enr.com

[Return to Event Overview](#)

The next Section is "**Event Comments and Attachments**".

The buyer should enter any specific comments for the event.

Send to Bidder field: Select to enable the bidder to see the comment.

Include on Award field: Select to enable the comments to appear on the contract or purchase order award.

Adding Attachments:

Attached File: Select the file to attach to this event.

Attachment Description: Enter a description (name) for the attachment.

Display to Bidder: Select this check box if you want this attachment to be available to bidders.

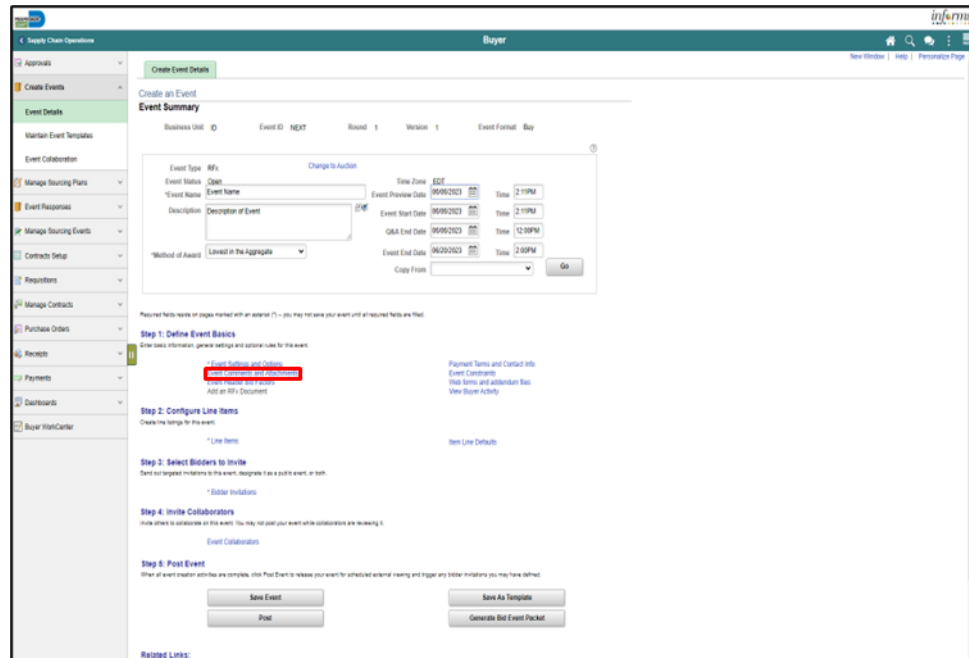
Include on Award: Select this check box if you want to include this attachment with the award.

Reorder Attachments: Select the Reorder Attachments button to rearrange attachments.

Note: The Bid Packet Merge Pdf file will be in the order listed on the Events Comments and Attachments page.

Select the **Events Comments and Attachments** link.

13.



14.

Enter the desired information into the **Comments** field.

Note: Select the **Send To Bidder** checkbox if the comments are intended for the bidder.

The screenshot shows the Informa Buyer application interface. On the left is a vertical navigation menu with options like 'Supply Chain Operations', 'Approvals', 'Create Events', 'Event Details', 'Manage Event Templates', 'Event Collaboration', 'Manage Sourcing Plans', 'Event Responses', 'Manage Sourcing Events', 'Contracts Setup', 'Responses', 'Manage Contracts', 'Purchase Orders', 'Receipts', 'Payments', 'Discounts', and 'Buyer Workspace'. The main header area includes the 'Buyer' title and user information. The main content area is titled 'Event Comments and Attachments' for 'Event ID: NEXT'. It features a 'Comments' section with a large text input area highlighted by a red rectangle, and an 'Attachments' section below it. At the bottom of the main content area, there are buttons for 'Add Attachment', 'OK', 'Cancel', and 'Refresh'.

15.

Select the **Add Attachment** button.

Select the **Choose File** button.

Select the desired file. **Note:** The file name has a 30 Character Limit.

Select the **Open** button.

Select the **Upload** button.

The screenshot displays the Informa Buyer application interface. On the left is a navigation sidebar with various menu items. The main content area is titled 'Buyer' and shows the 'Event Comments and Attachments' section for a specific event (Event ID: 1637). The 'Add Attachment' button is highlighted with a red rectangle. A file selection dialog box is open, showing the file 'C:\ADMIN\G1319.m' selected, with the 'Upload' button also highlighted with a red rectangle.

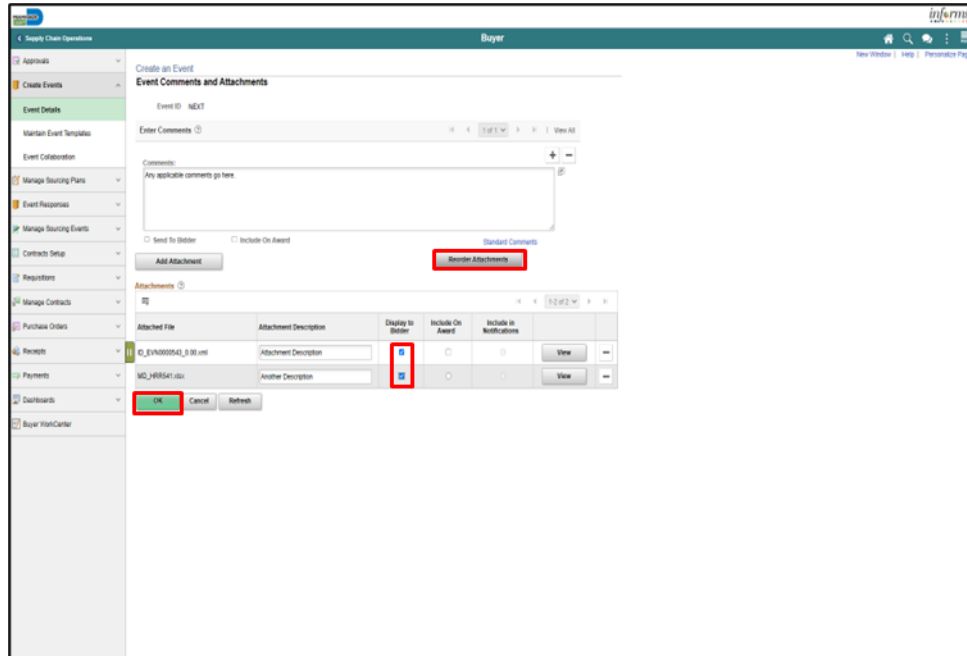
Enter the desired information into the **Attach Description** field.

*Optional: Select the **Display to Bidder** and/or **Include On Award** option.*

Note: The Bid Event Packet only includes attachments designated with the Display to Bidder checkbox. If more than one attachment is added, the **Reorder** button allows for a resequencing of the attachments. The attachment option is available; however, it is not required.

Select the **OK** button.

16.

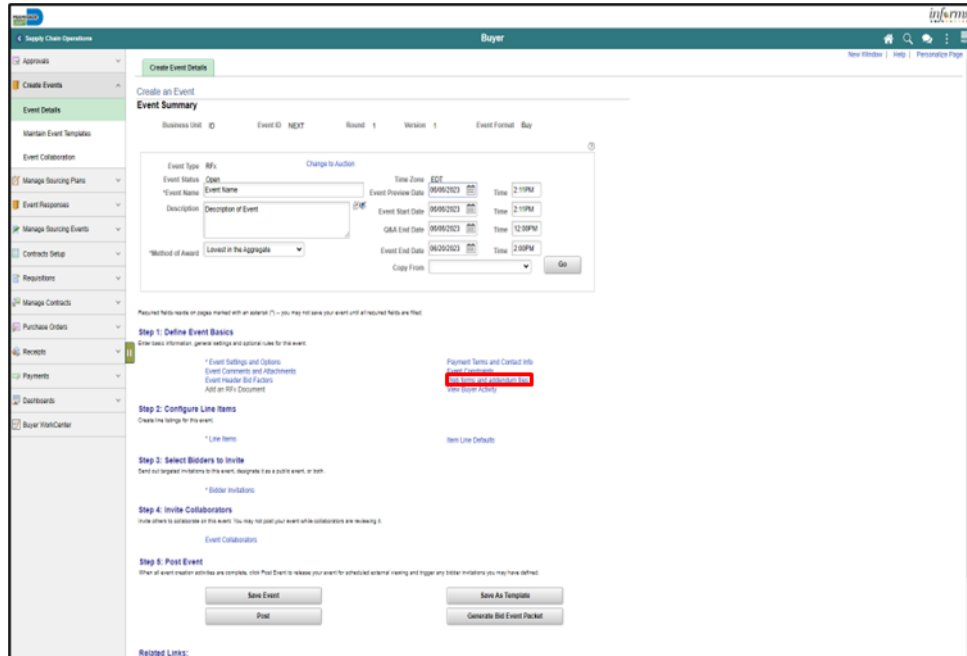


The screenshot displays the 'Buyer' interface for creating an event. The 'Event Comments and Attachments' section is active, showing a table of attachments. The table has columns for 'Attached File', 'Attachment Description', 'Display to Bidder', 'Include On Award', and 'Include in Notifications'. Two attachments are listed: 'C_EV0000042_001.pdf' and 'MD_H000041.xlsx'. The 'Display to Bidder' checkbox for the first attachment is checked and highlighted with a red box. The 'Reorder Attachments' button is also highlighted with a red box. At the bottom of the form, the 'OK' button is highlighted with a red box.

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
C_EV0000042_001.pdf	Attachment Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
MD_H000041.xlsx	Another Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View

Select the **Web forms and addendum files** link.

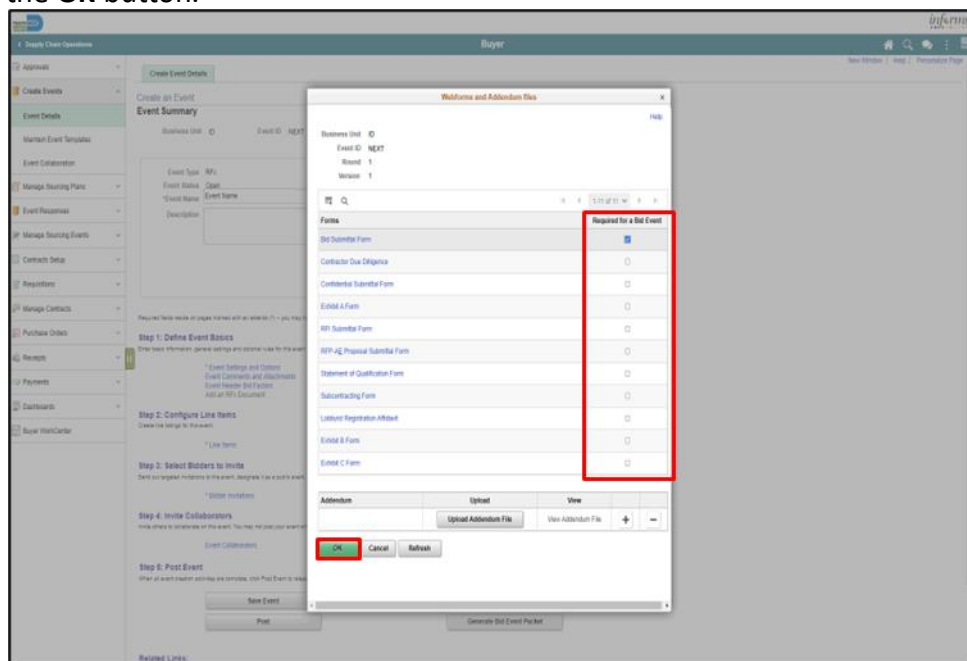
17.



The screenshot shows the 'Create an Event' page in the Buyer portal. The 'Web forms and addendum files' link is highlighted in red. The page includes a sidebar with navigation links, a main content area with event details, and a 'Related Links' section at the bottom.

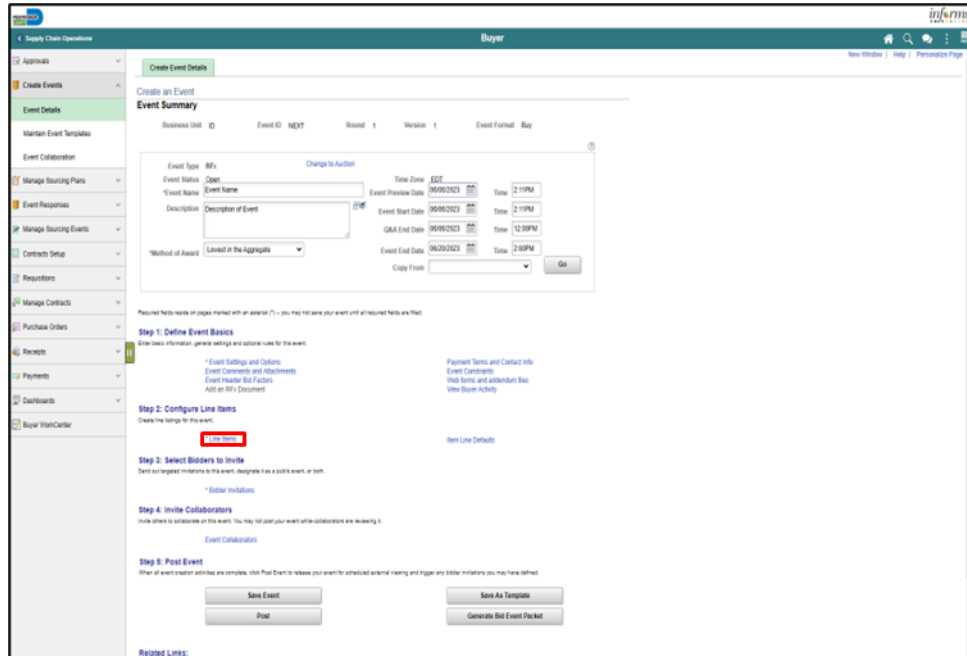
Select the appropriate form(s) by checking the **Required for a Bid Event** box.
Select the **OK** button.

18.



The screenshot shows the 'Web forms and addendum files' dialog box. The 'Required for a Bid Event' checkbox is checked for the 'Get Submittal Form'. The dialog box also includes a table of forms and addendums, and buttons for 'OK', 'Cancel', and 'Refresh'.

19.

Select the **Line Items** link.


Buyer

Create an Event

Event Summary

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

Event Details

Event Name: Description of Event

Event Start Date: 05/05/2023 Time: 2:15PM

Event End Date: 05/05/2023 Time: 2:15PM

Method of Award: Lowest in the Aggregate

Step 1: Define Event Basics

Event Settings and Options

Event Name: Description of Event

Event Start Date: 05/05/2023 Time: 2:15PM

Event End Date: 05/05/2023 Time: 2:15PM

Method of Award: Lowest in the Aggregate

Step 2: Configure Line Items

Click the 'Add' button to add a new line item.

Step 3: Select Bidders to Invite

Send our targeted invitations to the event. Assigning it as a public event, or both.

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event until collaborators are invited.

Step 5: Post Event

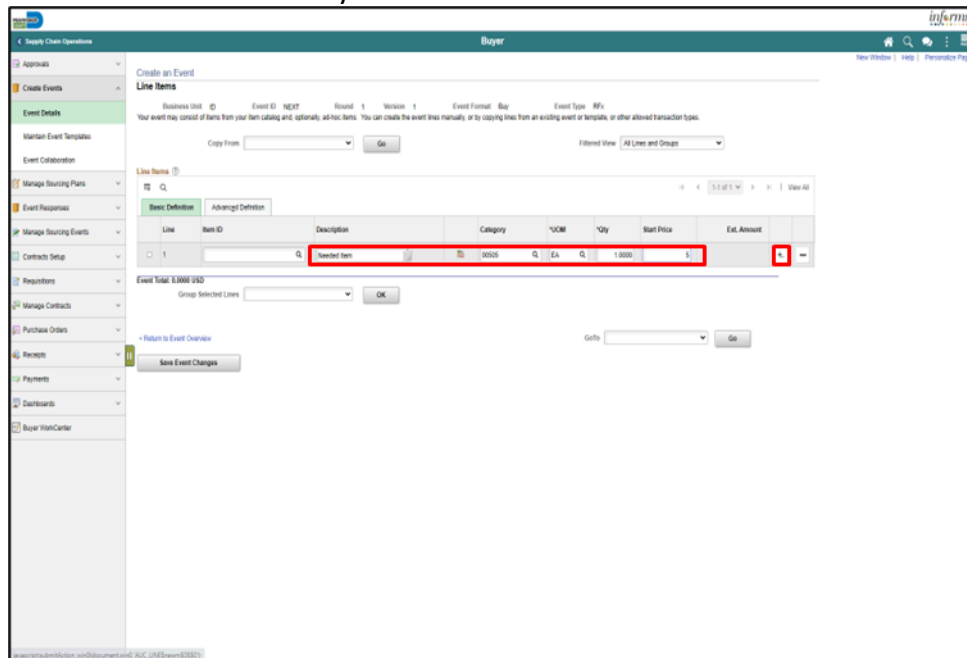
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event Post Generate Bid Event Packet

20.

Input the required **Basic Definition** details.

- **Description**
- **Category**
- **UOM**
- **Qty**
- **Start Price**

Select the **Add** button to add any additional lines.


Buyer

Create an Event

Line Items

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

Event Details

Event Name: Description of Event

Event Start Date: 05/05/2023 Time: 2:15PM

Event End Date: 05/05/2023 Time: 2:15PM

Method of Award: Lowest in the Aggregate

Step 1: Define Event Basics

Event Settings and Options

Event Name: Description of Event

Event Start Date: 05/05/2023 Time: 2:15PM

Event End Date: 05/05/2023 Time: 2:15PM

Method of Award: Lowest in the Aggregate

Step 2: Configure Line Items

Click the 'Add' button to add a new line item.

Step 3: Select Bidders to Invite

Send our targeted invitations to the event. Assigning it as a public event, or both.

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event until collaborators are invited.

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 Post Generate Bid Event Packet

Line Items

Line	Item ID	Description	Category	UOM	Qty	Start Price	Ext. Amount
1		Needed Item	0000	EA	1,000	1	

Event Total: 1,000 USD

Group Selected Lines: OK

Return to Event Overview

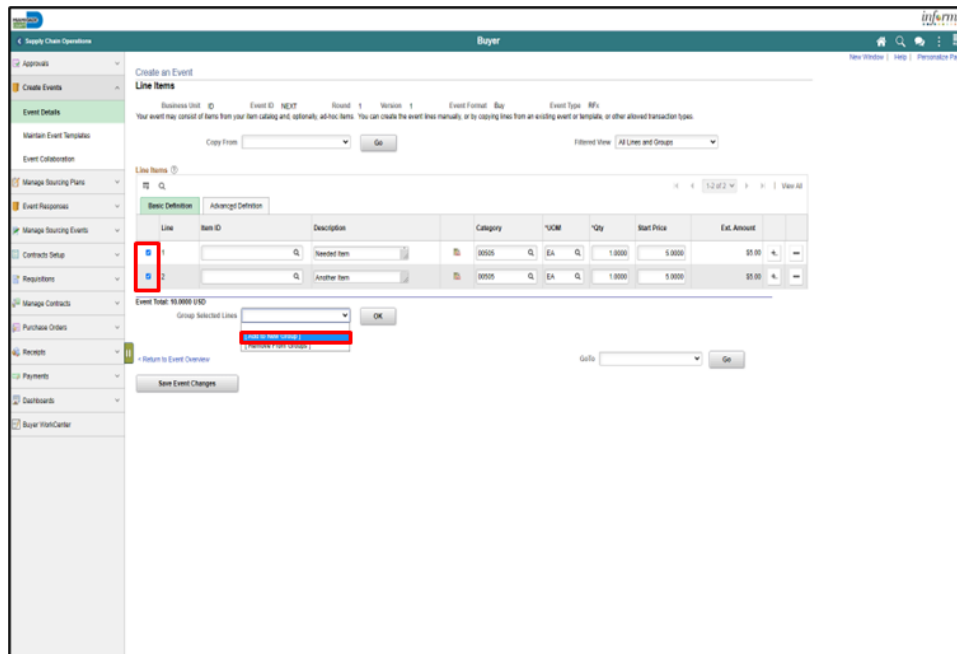
Save Event Changes

Grouping Lines [optional]

- Select Lines to Group Together, by selecting the checkbox next to each desired line
- In the Group Selected Lines drop down, select **[Add to New Group]**
- Enter in **Group ID** and **Description**

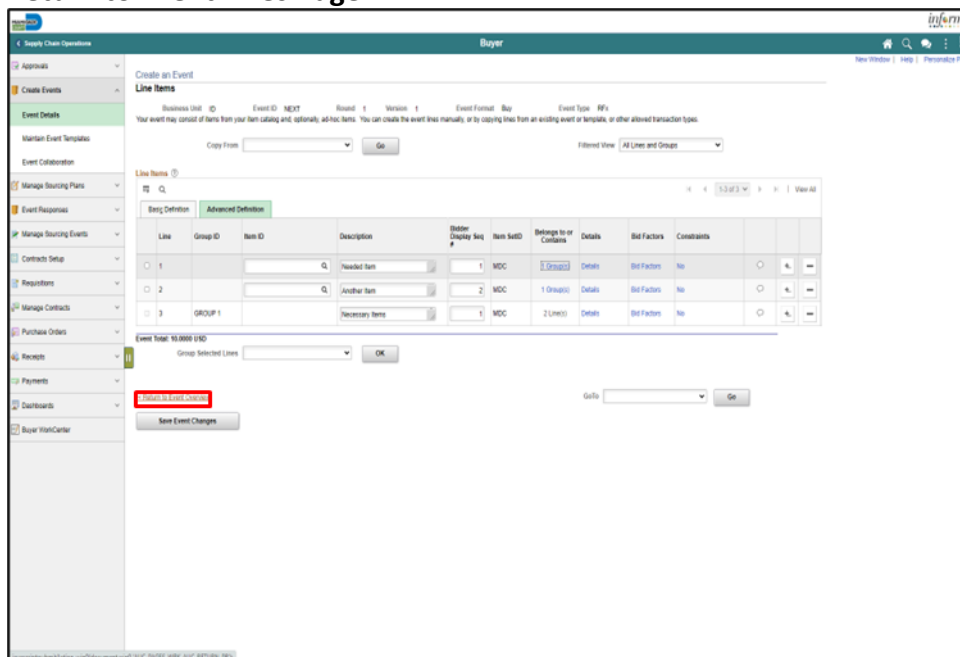
Note: The Description of Group is not displayed to the bidder, the Group ID is displayed to Bidder.

- Select **OK**



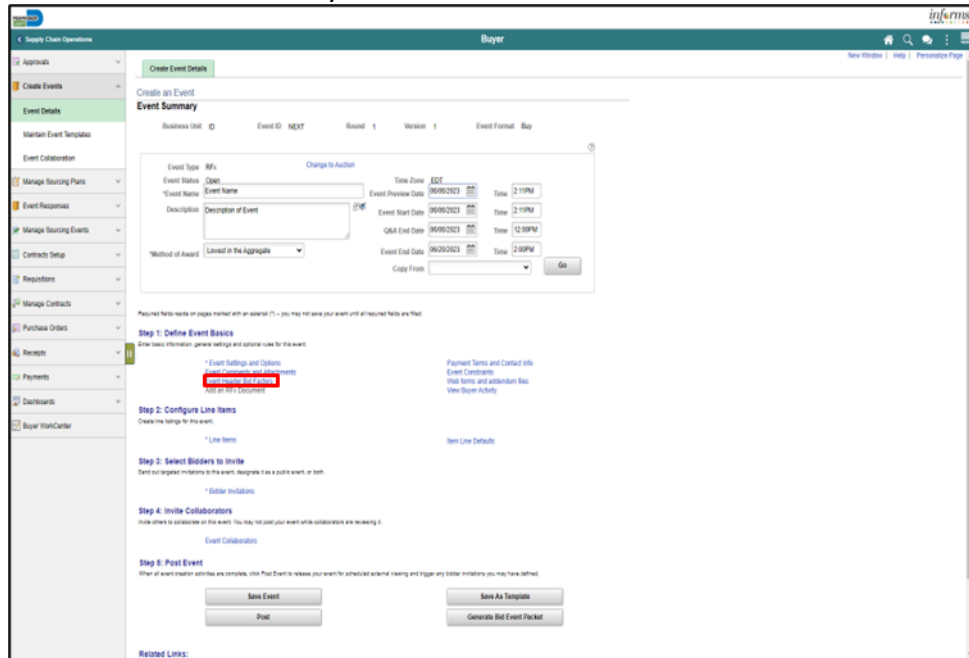
- Enter **UOM** for Grouped line

Select the **Return to Event Lines Page** link.



Select the **Event Header Bid Factors** link then review the bid factors. The standard header bid factors automatically defaults when one line item is added.

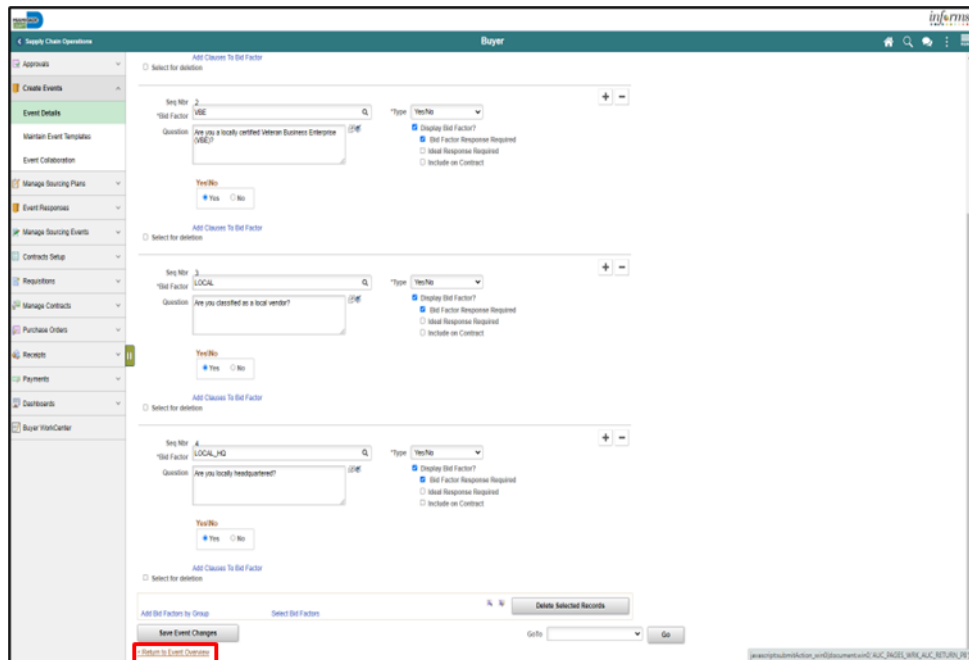
21.



The screenshot shows the 'Create Event Details' page in the Buyer portal. The left sidebar contains a list of links, with 'Event Header Bid Factors' highlighted in red. The main content area displays the 'Event Summary' section, which includes fields for Event Type, Event Name, Event Start Date, Event End Date, and Event Format. The 'Event Header Bid Factors' link is highlighted in red in the left sidebar.

Select the **< Return to Event Overview** link.

22.

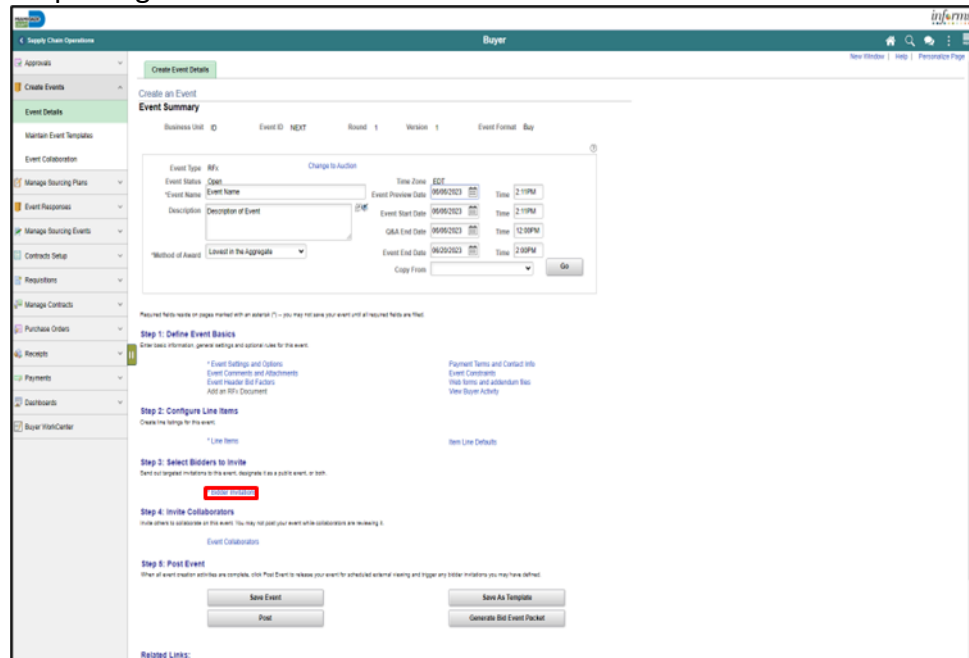


The screenshot shows the 'Event Header Bid Factors' page in the Buyer portal. The page displays a list of bid factors with columns for 'Bid Factor', 'Question', and 'Type'. The 'Return to Event Overview' link is highlighted in red in the bottom left corner.

23.

Select the **Bidder Invitations** link.

Note: Clerk of the Board and Vendor Services are defaulted to receive notifications of the event posting.



Create Event Details

Event Summary

Business Unit: [ID] Event ID: NEXT Round: 1 Version: 1 Event Format: Buy

Event Type: RFI Change to Auction

Event Status: COB

Event Name: [Text Box]

Description of Event: [Text Box]

Method of Award: Lowest in the Aggregate

Event Start Date: 06/09/2023 Time: 2:19PM

Event End Date: 06/09/2023 Time: 2:19PM

GA End Date: 06/09/2023 Time: 12:00PM

Event End Date: 06/20/2023 Time: 2:00PM

Copy From: [Text Box]

Step 1: Define Event Basics

Enter basic information, general settings and optional links for the event.

* Event Settings and Options
Event Comments and Attachments
Event Master Bid Factors
Add an RFI Document

Planned Terms and Contact Info
Event Constraints
Map Terms and Attachment Box
View Event Activity

Step 2: Configure Line Items

Create the settings for this event.

* Line Items

Step 3: Select Bidders to Invite

Select suggested bidders to the event. Designate this as a public event, or both.

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event until collaborators are selected.

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external posting and trigger any bidder invitations you may have defined.

Save Event Post Save As Template Generate Bid Event Packet

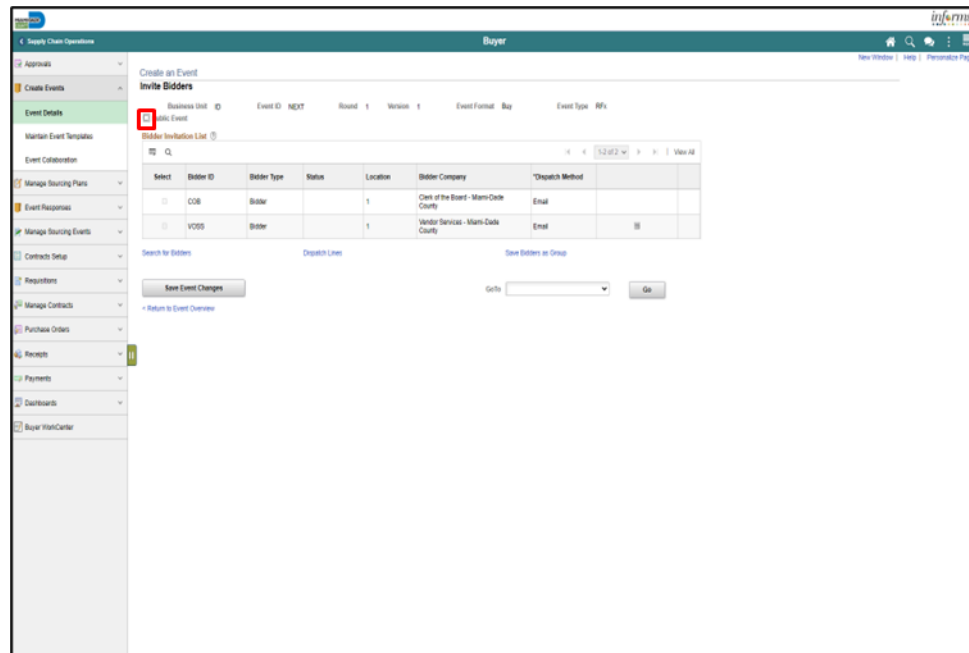
Related Links:

24.

Select the **Public Event** option.

Note: When an event is public, all Bidders and Suppliers that are in the system will be notified automatically if the categories of the event match the categories from the Bidder's and Supplier's profile.

Note: If sourcing from a Bidder Group/Prequalified Pool, do not select the Public Event option.



Invite Bidders

Business Unit: [ID] Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFI

Public Event

Bidder Invitation List

Select	Bidder ID	Bidder Type	Status	Location	Bidder Company	Dispatch Method
<input type="checkbox"/>	COB	Bidder		1	Clerk of the Board - Mono-Gate County	Email
<input type="checkbox"/>	VOS	Bidder		1	Vendor Services - Mono-Gate County	Email

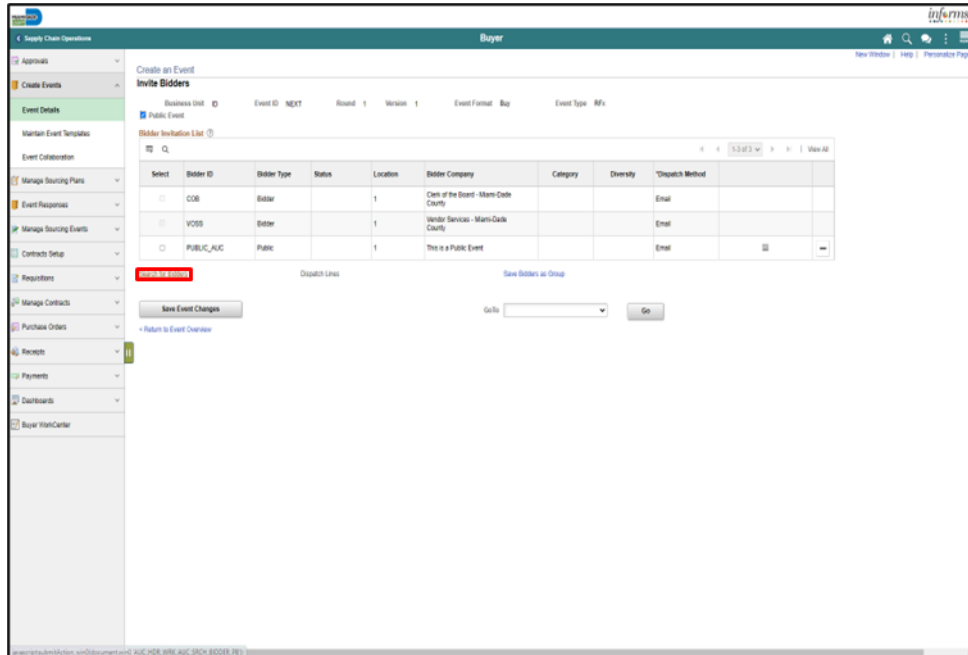
Search for Bidders Dispatch Links Save Bidders as Group

Save Event Changes Go

Return to Event Overview

Select the **Search for Bidders** link.

25.

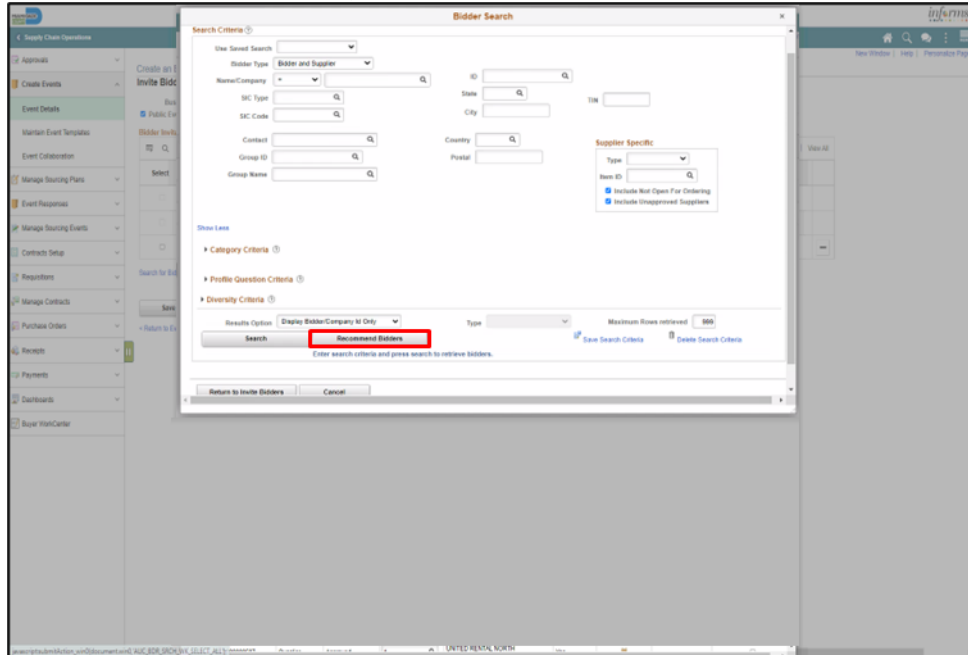


The screenshot shows the 'Buyer' interface with a sidebar on the left containing various navigation links. The main content area is titled 'Buyer' and includes a 'Create an Event' button and a 'Public Event' link. Below this is a table with columns: Business Unit, ID, Event ID, NEXT, Round, Version, Event Format, Buy, Event Type, and RFX. The table contains three rows of data. The 'Search for Bidders' link is highlighted in red in the bottom right corner of the main content area.

Select the **Recommend Bidders** button.

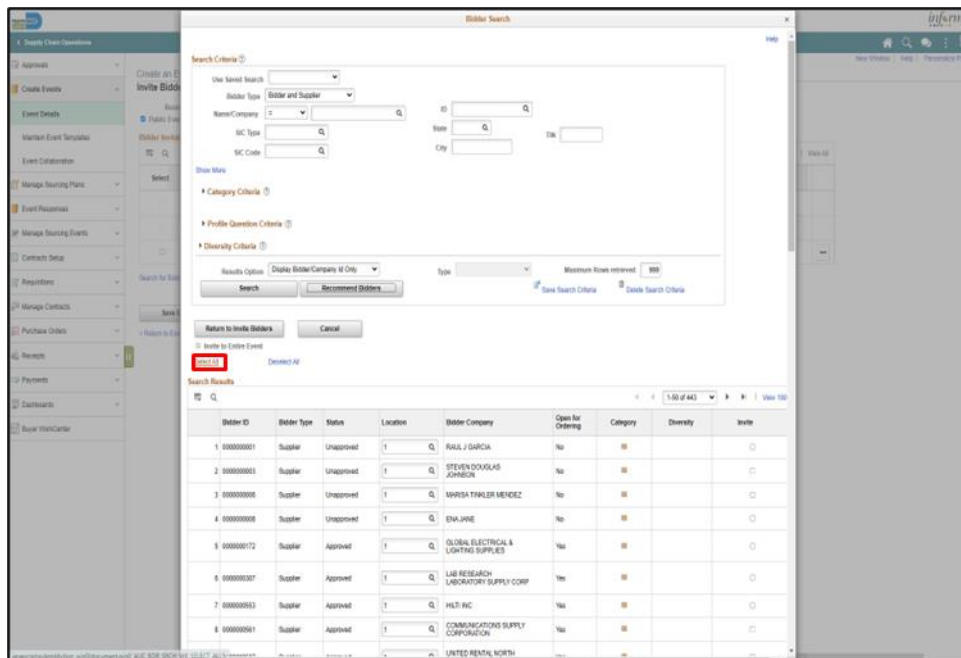
Note: If sourcing from a bidder group/prequalified pool, select the **Show More** link and enter the contract ID in the **Group Name** field, then select the **Search** button.

26.



The screenshot shows the 'Bidder Search' dialog box. It contains various search criteria fields including 'Bidder Type', 'Name/Company', 'SIC Type', 'SIC Code', 'Contract', 'Group ID', 'Group Name', 'ID', 'State', 'City', 'Country', 'Postal', 'Supplier Specific', 'Type', and 'Item ID'. There are also checkboxes for 'Include Not Open For Bidding' and 'Include Unapproved Suppliers'. At the bottom, there are buttons for 'Search', 'Recommend Bidders' (highlighted in red), 'Save Search Criteria', and 'Delete Search Criteria'. The 'Return to Invite Bidders' button is also visible at the bottom left.

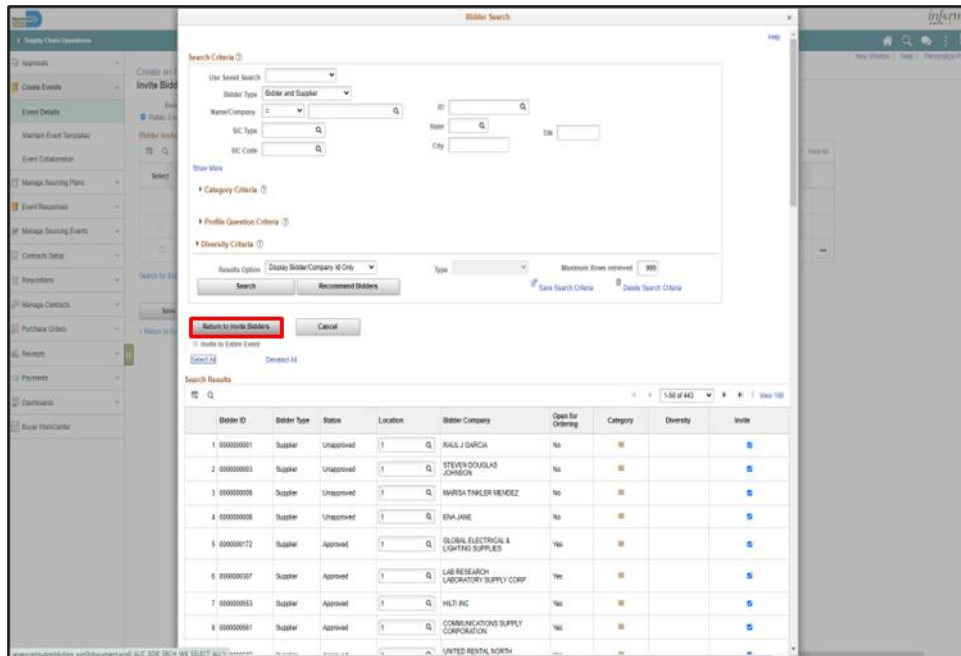
27.

Select the **Select All** link.


The screenshot shows the 'Bidder Search' window with various search criteria. The 'Select All' link is highlighted in red. Below the search criteria, there is a table of search results.

Bidder ID	Bidder Type	Status	Location	Bidder Company	Open for Ordering	Category	Diversity	Invite
1 000000001	Supplier	Unapproved	1	RAUL J GARCA	No	IS		
2 000000003	Supplier	Unapproved	1	STEVEN DOUGLAS JOHNSON	No	IS		
3 000000006	Supplier	Unapproved	1	MARISA FINKLER MENDEZ	No	IS		
4 000000008	Supplier	Unapproved	1	ENH JANE	No	IS		
5 000000172	Supplier	Approved	1	GLOBAL ELECTRICAL & LIGHTING SUPPLIES	Yes	IS		
6 000000307	Supplier	Approved	1	LAB RESEARCH LABORATORY SUPPLY CORP	Yes	IS		
7 000000553	Supplier	Approved	1	HILLI INC	Yes	IS		
8 000000561	Supplier	Approved	1	COMMUNICATIONS SUPPLY CORPORATION	Yes	IS		

28.

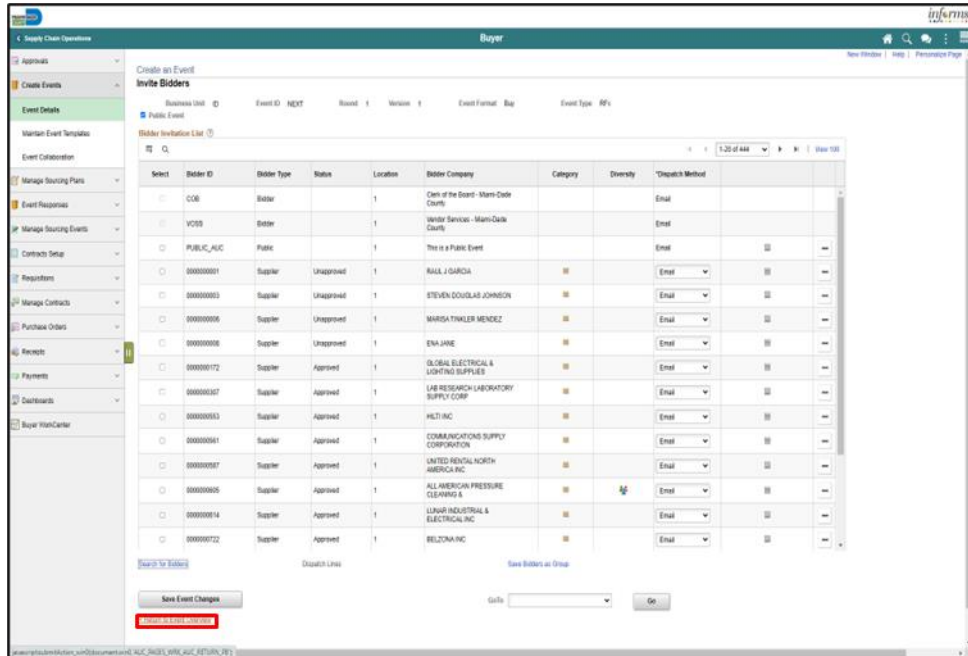
Select the **Return to Invite Bidders** button.


The screenshot shows the 'Bidder Search' window with various search criteria. The 'Return to Invite Bidders' button is highlighted in red. Below the search criteria, there is a table of search results.

Bidder ID	Bidder Type	Status	Location	Bidder Company	Open for Ordering	Category	Diversity	Invite
1 000000001	Supplier	Unapproved	1	RAUL J GARCA	No	IS		
2 000000003	Supplier	Unapproved	1	STEVEN DOUGLAS JOHNSON	No	IS		
3 000000006	Supplier	Unapproved	1	MARISA FINKLER MENDEZ	No	IS		
4 000000008	Supplier	Unapproved	1	ENH JANE	No	IS		
5 000000172	Supplier	Approved	1	GLOBAL ELECTRICAL & LIGHTING SUPPLIES	Yes	IS		
6 000000307	Supplier	Approved	1	LAB RESEARCH LABORATORY SUPPLY CORP	Yes	IS		
7 000000553	Supplier	Approved	1	HILLI INC	Yes	IS		
8 000000561	Supplier	Approved	1	COMMUNICATIONS SUPPLY CORPORATION	Yes	IS		

Select the **< Return to Event Overview** link.

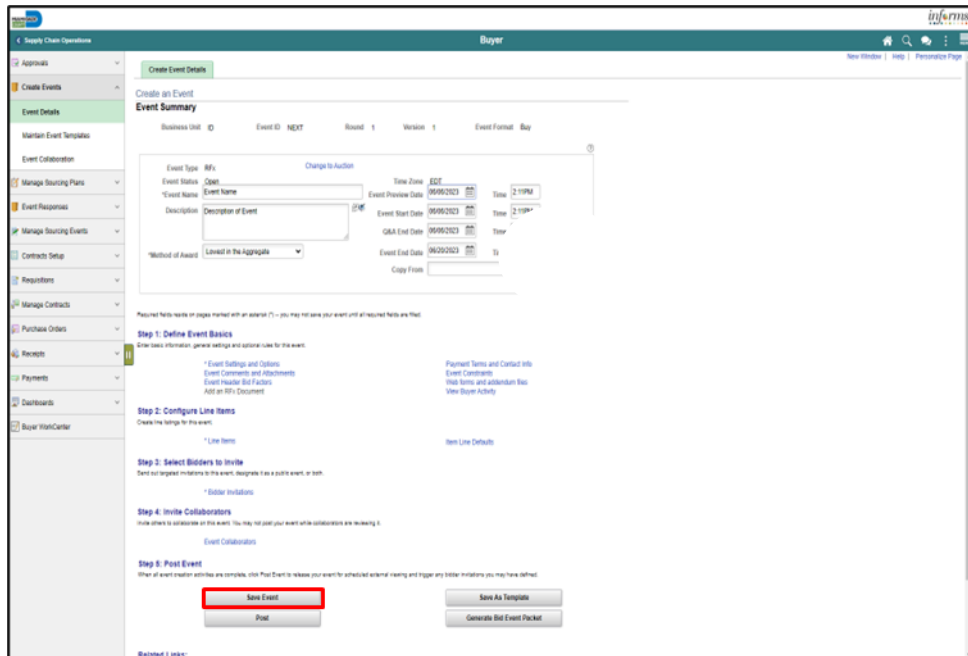
29.



The screenshot shows the 'Invite Bidders' screen in the Informatics Buyer interface. The table lists various bidders, including CDB, VOS, PUBLIC_AUC, and several suppliers. The 'Return to Event Overview' link is highlighted with a red box at the bottom left of the table area.

Select the **Save Event** button.

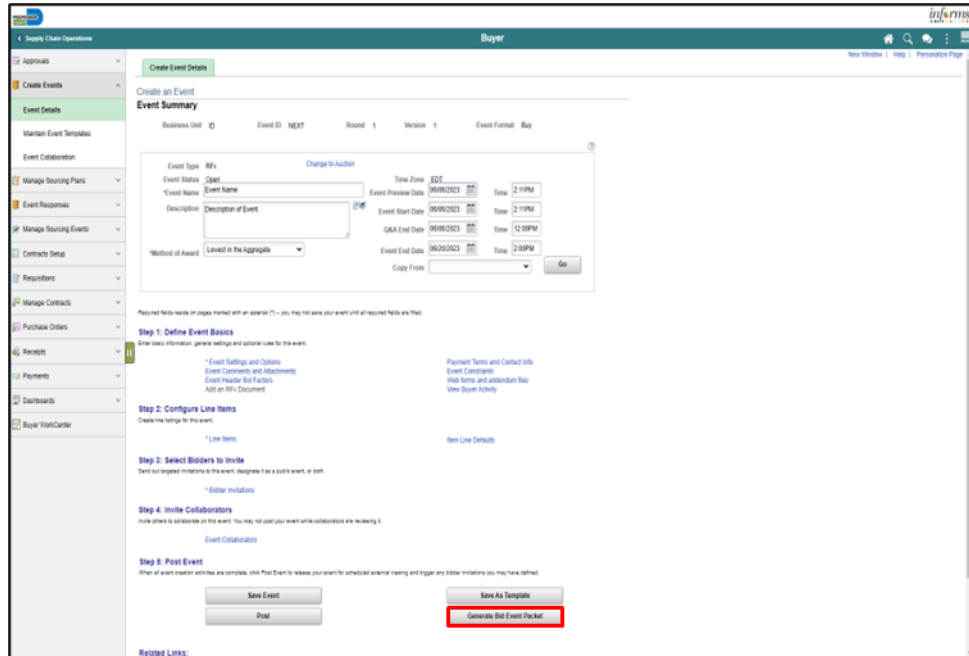
30.



The screenshot shows the 'Event Summary' screen in the Informatics Buyer interface. It includes sections for 'Event Details', 'Step 1: Define Event Basics', 'Step 2: Configure Line Items', 'Step 3: Select Bidders to Invite', 'Step 4: Invite Collaborators', and 'Step 5: Post Event'. The 'Save Event' button is highlighted with a red box at the bottom of the 'Step 5: Post Event' section.

Select the **Generate Bid Event Packet** button.

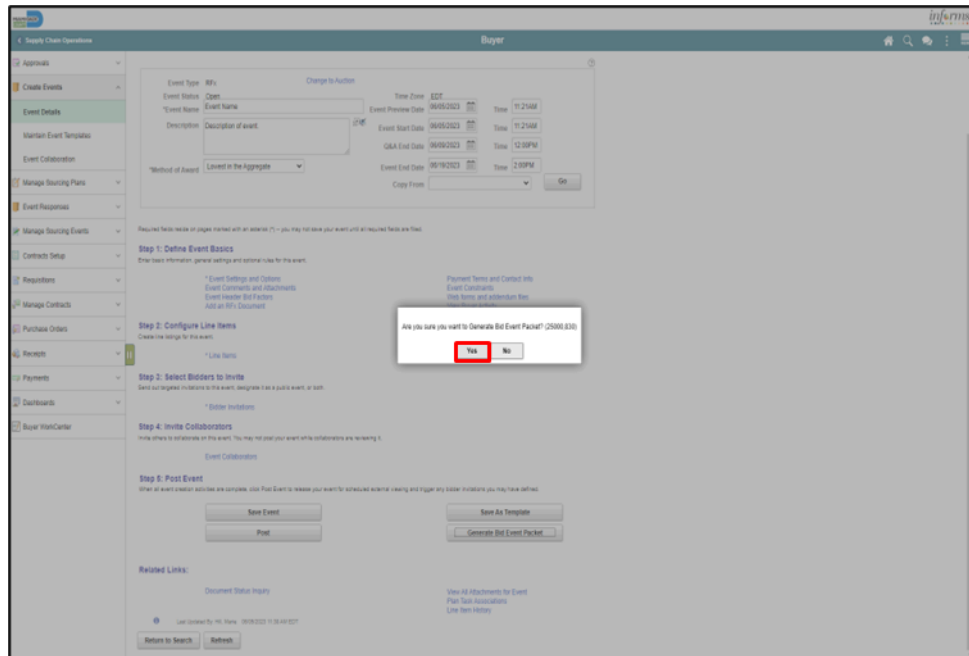
31.



The screenshot shows the 'Create Event Details' page in the INFORMS Buyer interface. The 'Event Summary' section is visible, showing event details like Event Name, Description, and dates. At the bottom of the page, the 'Generate Bid Event Packet' button is highlighted with a red rectangle.

Select the **Yes** button.

32.



The screenshot shows the same 'Create Event Details' page, but with a confirmation dialog box overlaid. The dialog box asks 'Are you sure you want to Generate Bid Event Packet? (25000.00)' and has 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a red rectangle.

Select the **OK** button.

Simple Chair Operations

Approvals

Create Events

Event Details

Event Event Templates

Event Collaboration

Manage Sourcing Plans

Event Responses

Manage Sourcing Events

Contracts Detail

Requirements

Manage Contracts

Purchase Orders

Revents

Payments

Dashboards

Buyer MailCenter

Buyer

Saving Page

Change to Auction

Event Type: RFA

Event Status: Open

Event Name: Event Name

Description:

Method of Award: Lowest in the Aggregate

Time Zone: EST

Event Preview Date: 06/05/2023

Event Start Date: 06/05/2023

Q&A End Date: 06/06/2023

Event End Date: 06/16/2023

Time: 11:21AM

Time: 11:21AM

Time: 12:00PM

Time: 2:00PM

Copy From

Go

Required fields (asterisk 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 Location: Bid Address

Add an RFI, if applicable

Payment Terms and Contract Info

Event Constraints

Link banks and submission fees

Step 2: Configure Line Items

Create line items for this event

* Line Items

Step 3: Select Bidders to Invite

Select our targeted institutions in this event. Designate if 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 until collaborators are reviewing it.

Event Collaborators

Step 5: Post Event

When all event posting 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

Post

Processing - Please wait

Instance: 204000

Run Status: Queued

Distribution Status: N/A

Related Links:

Document Status Inquiry

View All Attachments for this Event

Plan Task Attachments

Line Item History

Go

Last Modified: 06/05/2023 02:39:57 PM

Return to Search

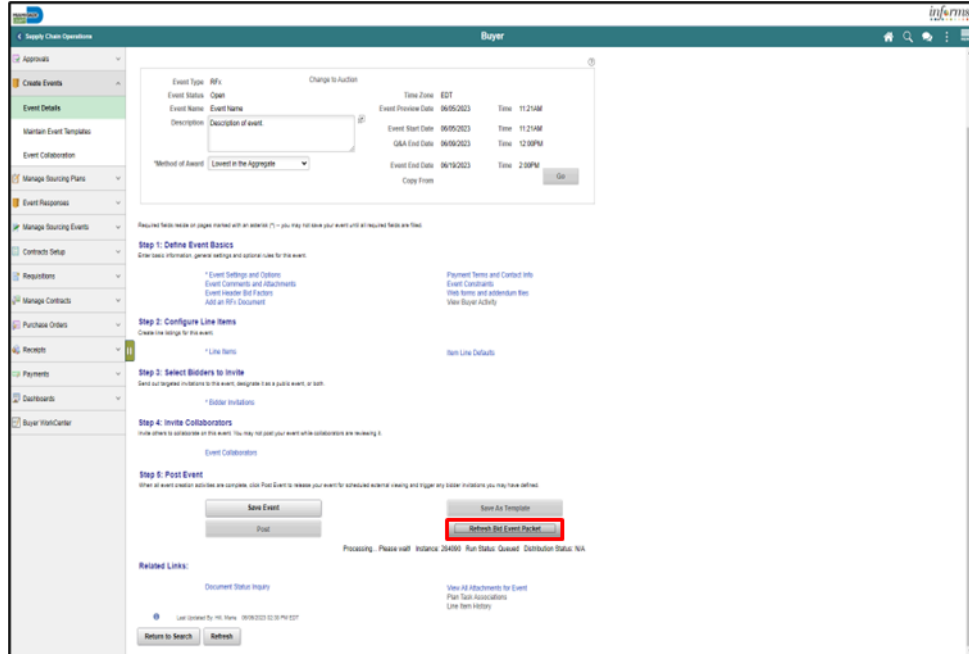
Refresh

Select the **OK** button.

The screenshot displays the Oracle Primavera P6 'Event Summary' page. The main content area shows event details for 'Event ID: E34809125'. A modal dialog box is overlaid in the center, displaying the message: 'MR_AJDEVTOP has been scheduled. Process Instance = 203140 (9726 911)'. The 'OK' button on this dialog is highlighted with a red rectangle. The background interface includes a left-hand navigation pane with options like 'Approvals', 'Create Events', and 'Event Details'. The main area also shows various event details such as 'Event Type: WFL', 'Event Status: Open', 'Event Name: [empty]', and 'Event Dates: 03/19/2023 to 03/24/2023'. At the bottom, there are buttons for 'Save Event', 'Print', 'Save As Template', and 'Refresh All Event Packet'.

Select the **Refresh Bid Event Packet** button. Repeat this step until a pop-up appears.

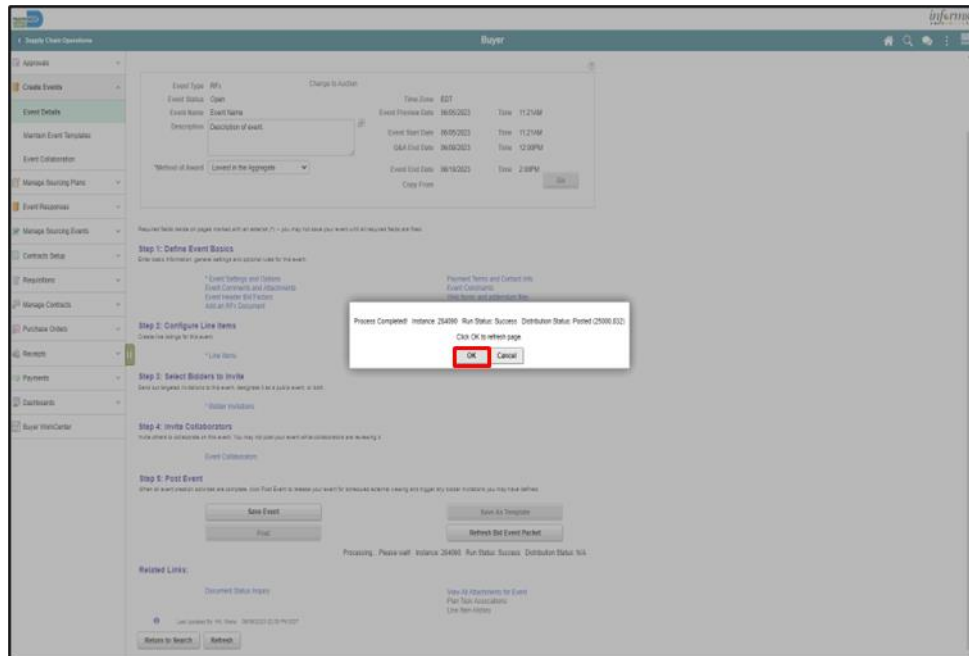
35.



The screenshot shows the InformS Buyer interface. On the left is a sidebar with navigation options: Approvals, Create Events, Event Details, Manage Bidding Plans, Event Responses, Manage Bidding Events, Contracts Setup, Requirements, Manage Contracts, Purchase Orders, Receipts, Payments, Dashboards, and Buyer WorkCenter. The main content area displays the 'Event Details' for a 'Buyer' event. It includes fields for Event Type (RFx), Event Status (Open), Event Name, Description, and Method of Award (Landed in the Aggregate). There are also fields for Event Preview Date, Event Start Date, and Event End Date. A 'Refresh Bid Event Packet' button is highlighted with a red box. Below the main content area, there are buttons for 'Save Event', 'Post', and 'Refresh Bid Event Packet'. A status bar at the bottom indicates 'Processing - Please wait - Instance: 254090 - Run Status: Success - Distribution Status: N/A'.

Select the **OK** button.

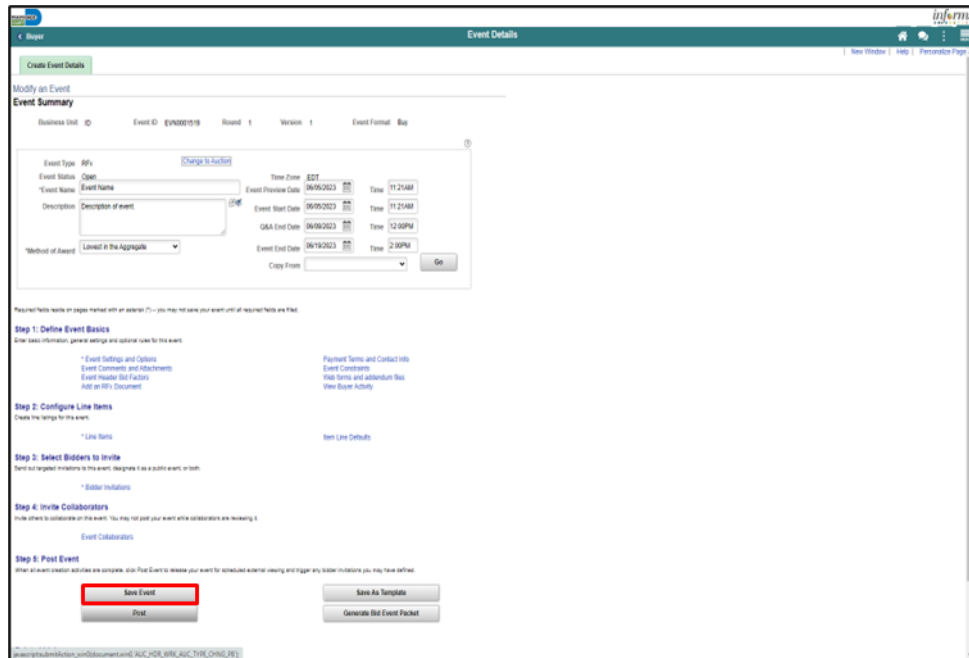
36.



This screenshot shows the same InformS Buyer interface as the previous one, but with a confirmation pop-up displayed in the center. The pop-up contains the text 'Process Completed - Instance: 254090 - Run Status: Success - Distribution Status: Posted (254090,022)' and a 'Click OK to return page' message. The 'OK' button is highlighted with a red box. The background interface is dimmed, showing the same navigation sidebar and event details as before.

Select the **Save Event** button.

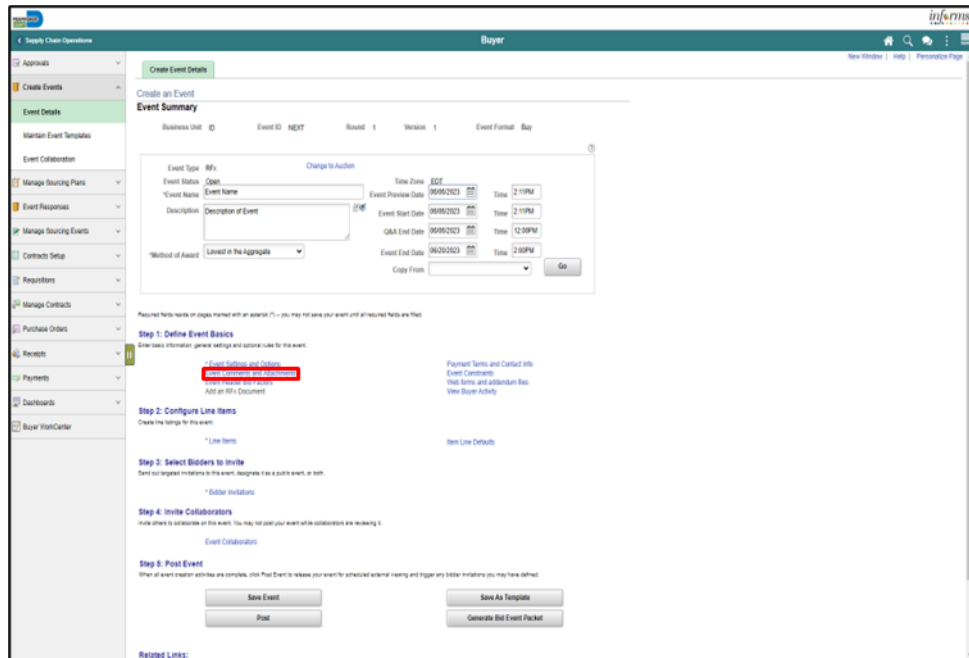
37.



The screenshot shows the 'Event Details' page in the Informatics system. The page is titled 'Event Details' and has a 'Buyer' role. The 'Event Summary' section is visible, showing fields for Event ID, Round, Version, and Event Format. Below this, there are sections for 'Event Type', 'Event Status', 'Event Name', 'Description', and 'Method of Award'. The 'Save Event' button is highlighted with a red rectangle. Other buttons visible include 'Post', 'Save As Template', and 'Generate Bid Event Packet'.

Select the **Event Comments and Attachments** link.

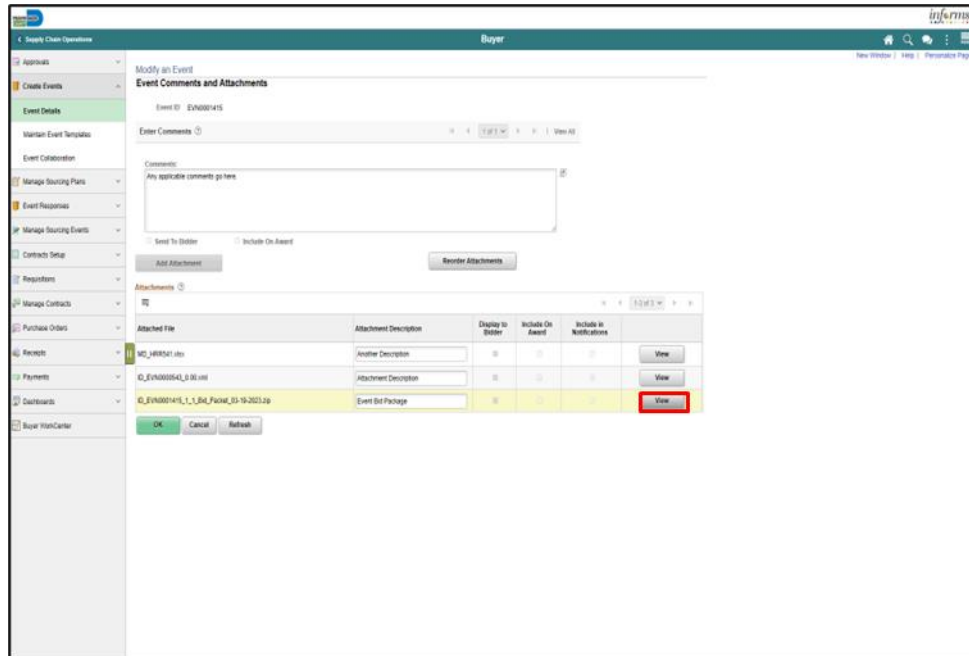
38.



The screenshot shows the 'Event Details' page in the Informatics system. The page is titled 'Event Details' and has a 'Buyer' role. The 'Event Summary' section is visible, showing fields for Event ID, Round, Version, and Event Format. Below this, there are sections for 'Event Type', 'Event Status', 'Event Name', 'Description', and 'Method of Award'. The 'Event Comments and Attachments' link is highlighted with a red rectangle. Other buttons visible include 'Post', 'Save As Template', and 'Generate Bid Event Packet'.

39.

View the **Event Bid Package** to ensure all documents were loaded into the .pdf file. Select the **View** button.



Buyer

Modify an Event

Event Comments and Attachments

Event ID: EVN001418

Enter Comments

Comments: Any applicable comments go here

Send To Bidder Include On Award

Add Attachment Register Attachments

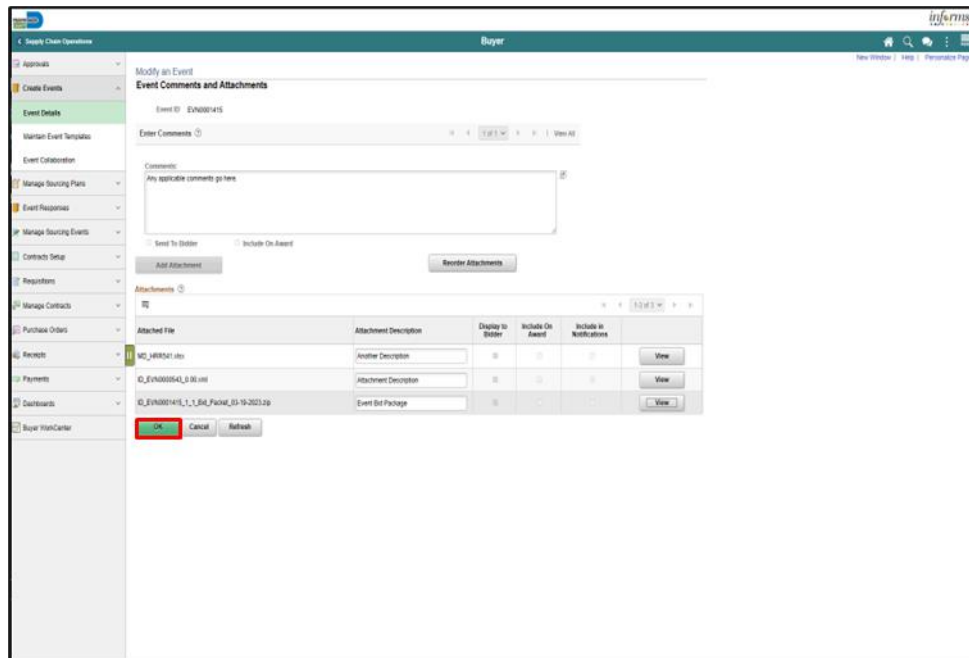
Attachments

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
MD_MBR241.xlsx	Another Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
GL_EVN00004L_0-00.xlsx	Attachment Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
GL_EVN001418_1_1_Bid_Package_03-10-2023.zip	Event Bid Package	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View

OK Cancel Refresh

40.

Select the **OK** button.



Buyer

Modify an Event

Event Comments and Attachments

Event ID: EVN001418

Enter Comments

Comments: Any applicable comments go here

Send To Bidder Include On Award

Add Attachment Register Attachments

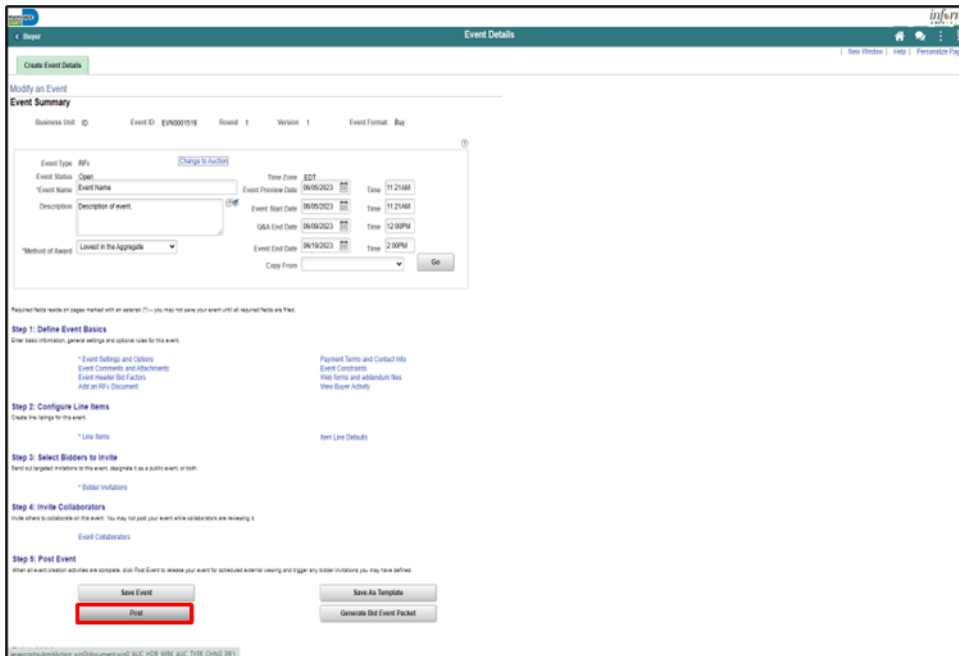
Attachments

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
MD_MBR241.xlsx	Another Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
GL_EVN00004L_0-00.xlsx	Attachment Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
GL_EVN001418_1_1_Bid_Package_03-10-2023.zip	Event Bid Package	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View

OK Cancel Refresh

Select the **Post** button.

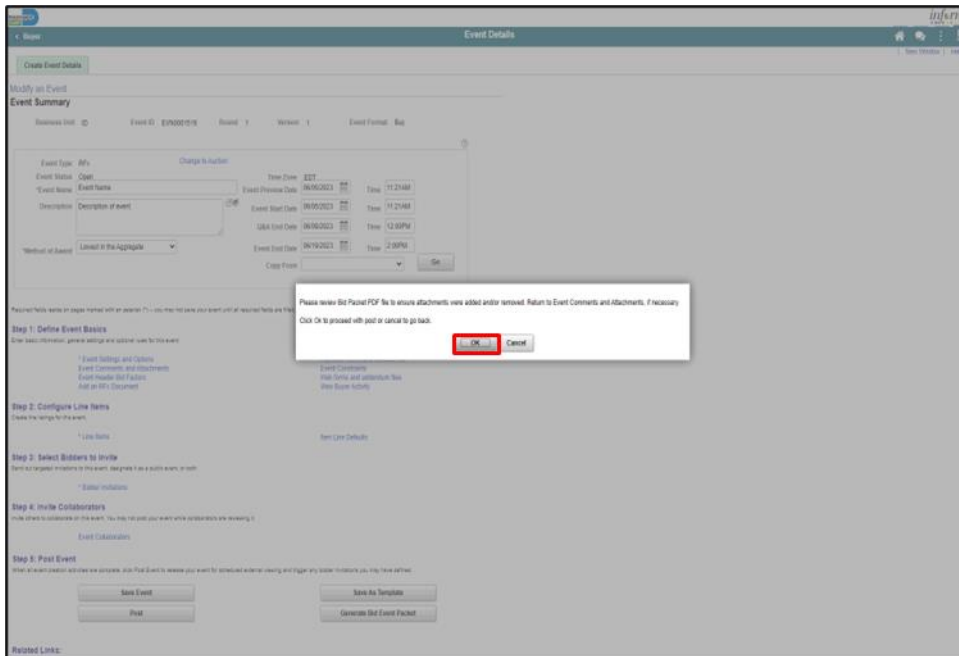
41.



The screenshot shows the 'Event Details' page in the INFORMS system. The 'Event Summary' section is visible, showing event details like Event ID, Round, Version, and Event Format. Below this, there are several steps: Step 1: Define Event Basics, Step 2: Configure Line Items, Step 3: Select Bidders to Invite, Step 4: Invite Collaborators, and Step 5: Post Event. At the bottom of the page, there are three buttons: 'Save Event', 'Post', and 'Generate Bid Event Packet'. The 'Post' button is highlighted with a red rectangular box.

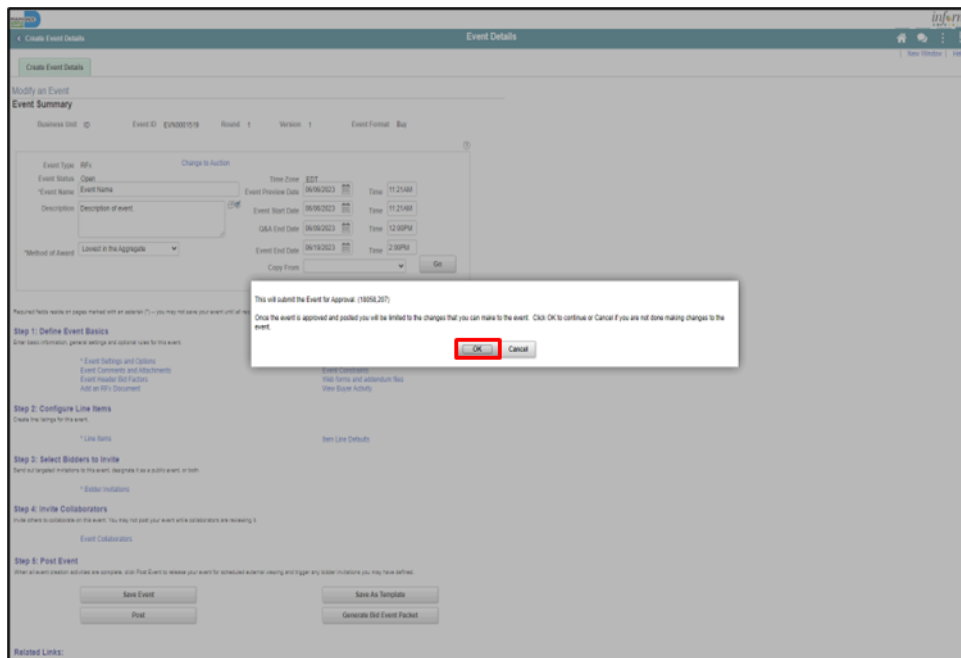
Select the **OK** button.

42.



This screenshot shows the same 'Event Details' page as in step 41, but with a confirmation dialog box overlaid. The dialog box contains the text: 'Please review Bid Packet PDF file to ensure attachments were added and/or removed. Return to Event Comments and Attachments, if necessary. Click Ok to proceed with post or cancel to go back.' Below this text are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red rectangular box.

43.

Select the **OK** button.

Event Details

Create Event Details

Modify an Event

Event Summary

Business Unit: ID: Event ID: 18058207 Round: 1 Version: 1 Event Format: Buy

Event Type: RFx Change to Auction

Event Status: Open

Event Name: [Text Field]

Description: Description of event [Text Field]

Method of Award: Lowest in the Aggregate

Time Zone: EDT

Event Preview Date: 06/06/2023 Time: 11:21AM

Event Start Date: 06/06/2023 Time: 11:21AM

Q&A End Date: 06/06/2023 Time: 12:00PM

Event End Date: 06/06/2023 Time: 2:00PM

Copy Price: [Dropdown]

Go

This will submit the Event for Approval (18058207).

Check 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

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

Add an RFx Document

Event Collaboration

Step 2: Configure Line Items

Create line items for this event.

Line Items

Item Line Details

Step 3: Select Bidders to Invite

Select our targeted bidders 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 until collaborators are working it.

Event Collaborators

Step 5: Post Event

After an event creation is complete, click Post Event to make your event for scheduled external clearing and trigger any bidder invitations you may have defined.

Save Event

Post

Save As Template

Generate Bid Event Packet

Related Links: