

Miami-Dade County



End User Training Guide

Course Code: SCM 204

Course Title: Strategic Sourcing

Course Overview

Course Description This course provides a comprehensive review of the Strategic Sourcing processes. This course consists of the following modules:

Module 1: Course Introduction
Module 2: Creating an RFI Event
Module 3: Creating a Buy Event
Module 4: Approve an Event
Module 5: Creating Multiple Versions of Sourcing Events
Module 6: View Event Q&A Forum
Module 7: Analyzing an Event
Module 8: Award a Buy Event
Module 9: Course Summary

Training Audiences The following audience(s), by INFORMS Security role(s) are required to complete this course prior to being granted related system access:

- MD_SS_DPT_BUYER
- MD_SS_DPT_EVENT_APPROVER
- MD_SS_EVENT_COLLABORATOR
- MD_SS_CTL_BUYER
- MD_SS_CTL_EVENT_APPROVER

Prerequisites Participants are required to complete the following End-User Training courses prior to starting this course:

- ERP 101 – Overview of INFORMS
- ERP 102 – INFORMS Navigation, Reporting, and Online Help
- SCM 101 – Supply Chain Management Fundamentals

Delivery Method This course is intended to be delivered through Instructor-led Training.

Table of Contents

Content

Module 1: Course Introduction

Module 2: Creating an RFI Event

Module 3: Creating a Buy Event

 Lesson 1: Creating a Buy Event

 Lesson 2: Import an RFx Document

Module 4: Approve an Event

Module 5: Creating Multiple Versions of Sourcing Events

Module 6: View Event Q&A Forum

Module 7: Analyzing an Event

 Lesson 1: View Merged Files and Vendor Files

 Lesson 2: Review Forms and Addendum

 Lesson 3: Analyze an Event by Aggregate

 Lesson 4: Analyze an Event by Line

 Lesson 5: Analyze an Event by Group

 Lesson 6: Analyze an RFI Event

Module 8: Award a Buy Event

 Lesson 1: Award a Buy Event

 Lesson 2: Change Event Status to Not Awarded

Module 9: Course Summary

Module 1: Course Introduction

Topics

This module covers the following topics:

- Learning Objectives
- Roles and Responsibilities
- Navigation
- Benefits to the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations, Activities, and Exercises

Module 1: Course Introduction

Learning Objectives

At the conclusion of this course, participants will be able to:

- Create an RFI Event
- Create a Buy Event
- Analyze an Event
- Award a Buy Event

Module 1: Course Introduction

Training Audience:

The following roles are associated with this course and will play a part in conducting the related business processes for the County:

Roles and Responsibilities

Strategic Sourcing Buyer (MD_SS_DPT_BUYER): The Strategic Sourcing Buyer can create, analyze, and award events.

Strategic Sourcing Event Approver (MD_SS_DPT_EVENT_APPROVER): The Strategic Sourcing Event Approver can approve or deny Events.

Strategic Sourcing Event Collaborator (MD_SS_EVENT_COLLABORATOR): The Strategic Sourcing Event Collaborator can collaborate on the sourcing event. Collaborators can access only events to which they have been invited to collaborate.

Strategic Sourcing Central Buyer (MD_SS_CTL_BUYER): The Central Procurement Buyer will be able to Create or Update Events or Plans.

Strategic Sourcing Central Approver (MD_SS_CTL_EVENT_APPROVER): The Central Procurement Approver will be able to Approve Sourcing Events or Plans.

The following roles are recommended for user departments requesting security access to the Strategic Sourcing module for an employee with buyer responsibilities:

Goods and Services/User Depts.:

- MD_SS_DPT_BUYER
- MD_SC_DPT_CONTRACT_ADMIN*
- MD_SC_CTL_GRI*

Construction Contracts/User Depts.:

- MD_SS_DPT_BUYER
- MD_SC_DPT_CONST_CONTRACT_ADMIN*
- MD_SC_CTL_GRI*

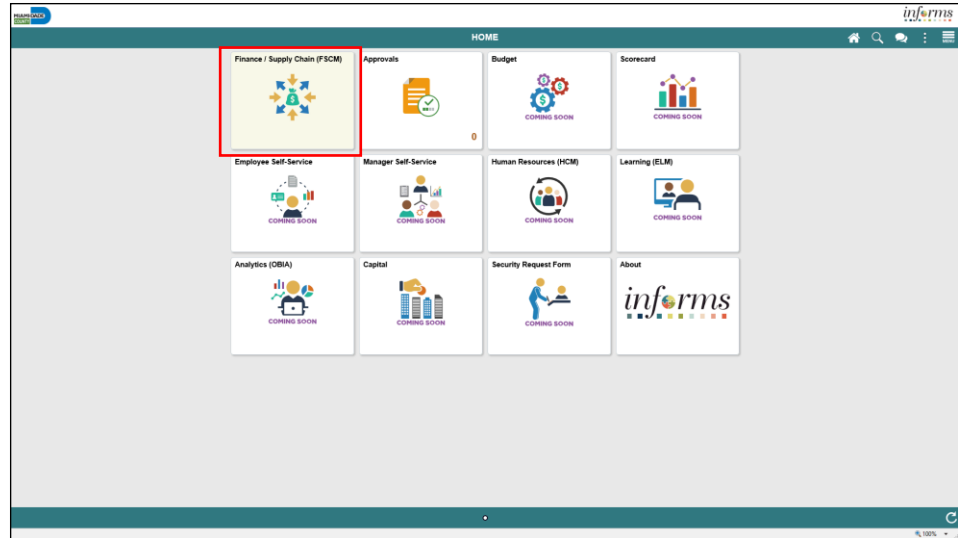
*Supplier Contracts module related roles. Refer to the [SCM 205 Departmental Supplier Contract Management Guide](#) for further details.

Module 1: Course Introduction

Navigation

Below are the steps to Navigate to Strategic Sourcing, which will be used for the initial navigation in the rest of this course:

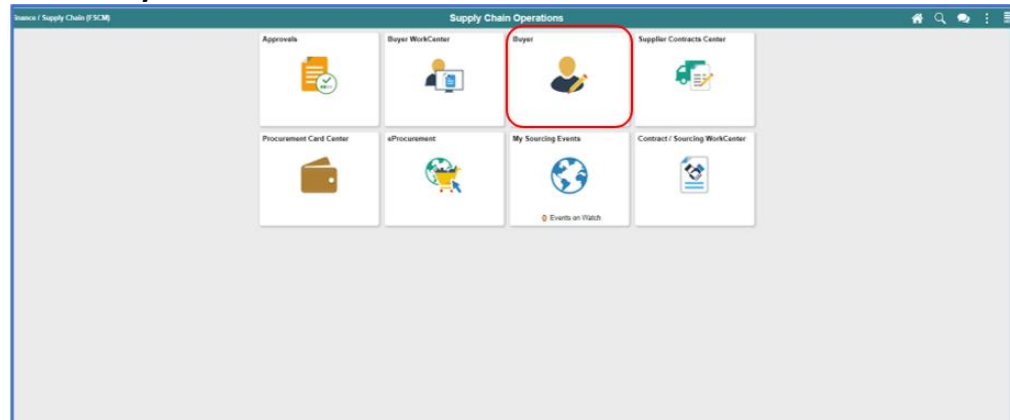
1. From the INFORMS homepage, select the **Finance/Supply Chain (FSCM)** tile.



2. Select the **Supply Chain Operations** tile.



3. Select the **Buyer** tile.



Module 1: Course Introduction

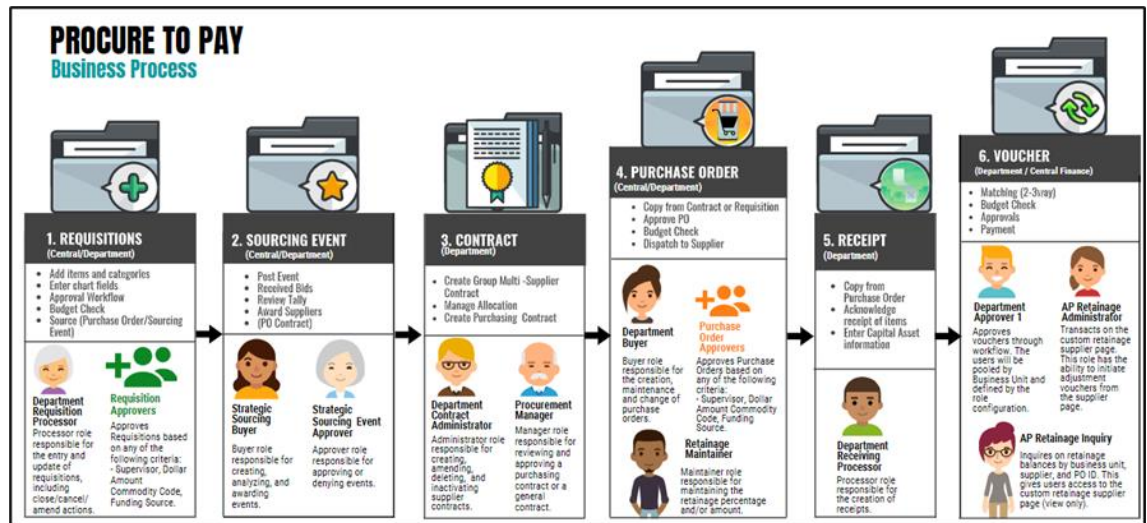
Benefits to the Business Process

The benefits to the Strategic Sourcing business process include:

- Sourcing event analysis (for Buy Events) is automated.
- Enhanced collaboration with key stakeholders.
- Automated approval notifications.
- Effectively track Bidder participation and results.

Module 1: Course Introduction

The End-to-End Business Process



Module 1: Course Introduction

Module 1: Course Introduction Summary



The following key concepts were covered in this module:

- Learning Objectives
- Roles and Responsibilities
- Navigation
- Benefits to the Business Process
- The End-to-End Business Process
 - Introduction to Demonstrations, Activities, and Exercises

The capabilities and functionality of INFORMS. We will cover topics such as:

- Event notifications
- Creating events
- Managing events
- Registering and maintaining Bidders
- Placing and managing bids
- Analyzing bids and awarding events

There are two types of events in INFORMS:

- An RFI event: an event created to request information only (no priced lines).
- A buy event: the purchase of goods or services (pricing for line items entered in the system).

Situation	Event Type
Information gathering for a request to qualify (RTQ), request for qualification (RFQ), or request for proposal (RFP).	RFI (Request for Information) Event
A complex purchase with many priced lines and bid factors. Bidders submit their pricing in line items.	Buy/Buy Event

Module 2: Creating an RFI Event

Topics

- This module includes the following lessons:
- Creating an RFI Event
- Import an RFx Document

Module 2: Creating an RFI Event

Learning Objectives

At the conclusion of this lesson, the user will be able to:

- Create an RFI Event
- Import an RFx Document

Module 2: Creating an RFI Event

Introduction

RFI events are used to:

- 1) Define qualification requirements and gather requested information for evaluation and pre-qualification of bidders for inclusion in a pre-qualified Bidder Group for further competitions (RTQ, RFQ).
- 2) Define scope and gather proposals and other related documents/information for evaluation and negotiation of a contract for a specific project (RFP, A&E)

The Buyer creates an event.

Optionally, the Buyer invites Strategic Sourcing Event Collaborators to give input to the event, reviews the input, and posts the event based on the input.

Bidders can register, review the event, and submit their bids.

The Buyer evaluates the submissions and after approval of funding in accordance with the County's delegated authority, will create Group Multi Supplier (GMS) contract with approved allocations. For RTQ/RFQ's buyer will create and relate Bidder Group defining pre-qualified suppliers to the GMS contract. For RFP, buyer will create child contract to awarded supplier and relate to GMS contract.

Module 2: Creating an RFI Event

Key Terms

The following key terms are used in this lesson:



Term	Definition
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. Note: The Event Preview Date and the Event Start Date should be the same.
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 INFORMS buyers. Be sure the time is set for 12:00 PM. Note: The date must be after the start date and at least 3-5 days prior to End Date .
Event End Date	The date when the bidding closes. Be sure the time is set for 2:00 PM.
Category Code	The category code associated with the Sourcing Event. Bidders or Suppliers will be searched based on the associated categorization.
Send to Bidder	Select to enable the Bidder to see the comment.
Include on Award	Select to enable the comments to appear on the contract or purchase order award.
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 this attachment is to be available to Bidders.
Include on Award	Select this check box if an attachment is to be included with the award.

Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

Navigate to: **Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer**

When creating a new event:

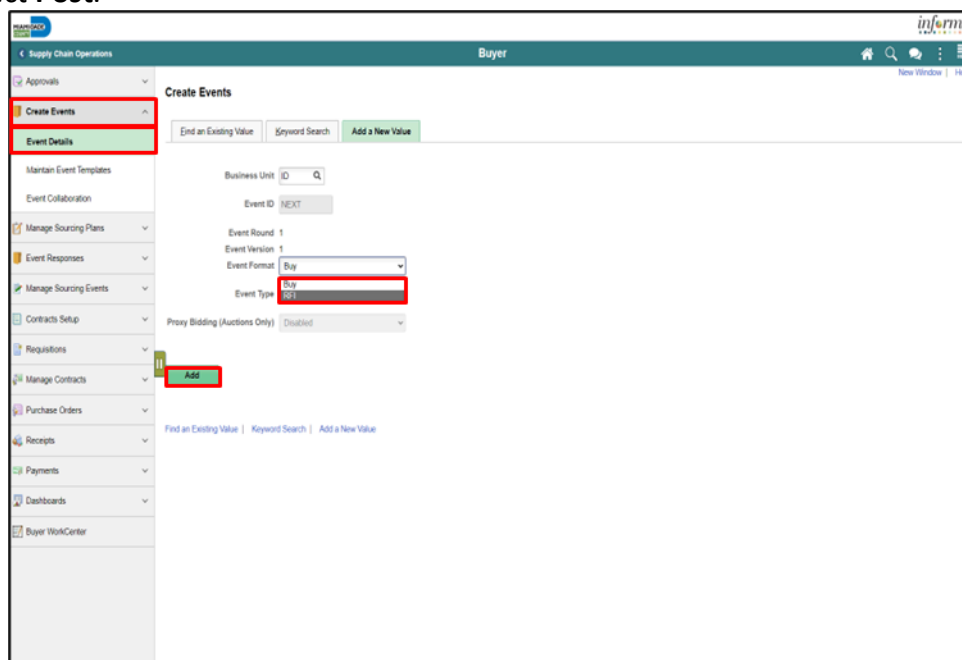
1. Select **Create Events** in the navigation pane.
2. Select **Event Details** in the navigation pane.
3. Select **RFI** from the **Event Format** list.
4. Select the **Add** button.

When modifying an event:

1. Select **Manage Sourcing Events** in the navigation pane.
2. Select **Event Workbench** in the navigation pane.
3. Search for the event to modify.

Note: The Legend can be expanded to explain the icon definitions.

4. Select the **New Version** icon on the line of the event to modify.
5. Select **Yes**.
6. Enter the modifications to the event.
7. Select **Save Event**.
8. Select **Post**.



5. Enter the desired information into the **Event Name** field.
6. 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.

Module 2: Creating an RFI Event

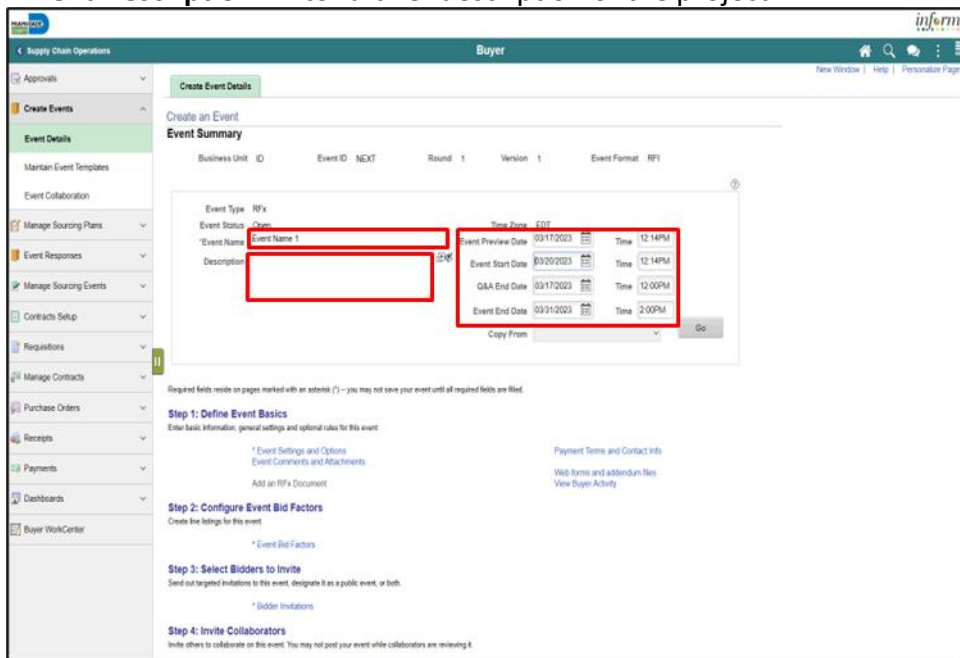
Lesson 1: Creating an RFI Event

7. Enter the desired information into the **Calendar** and **Time** fields.

- **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 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.

- **Event Name:** Enter the name of the event.
- **Event Description:** Enter a brief description of the project.



Event Summary

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

Event Type: RFI
Event Status: Open
Event Name: Event Name 1
Description: []

Time Zone: EDT

Event Preview Date: 09/17/2023 Time: 12:14PM
Event Start Date: 09/20/2023 Time: 12:14PM
Q&A End Date: 09/17/2023 Time: 12:00PM
Event End Date: 09/31/2023 Time: 2:00PM

Copy From: [] Go

Required fields reside on pages 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
Add an RFI's Document
Payment Terms and Contact Info
Web forms and addendum files
View Buyer Activity

Step 2: Configure Event Bid Factors
Create line items for this event.

* Event Bid Factors

Step 3: Select Bidders to Invite
Send out targeted invitations 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 while collaborators are reviewing it.

Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

Step 1: Define Event Basics

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

9. Enter the desired information into the **Minimum number of bid response** field.

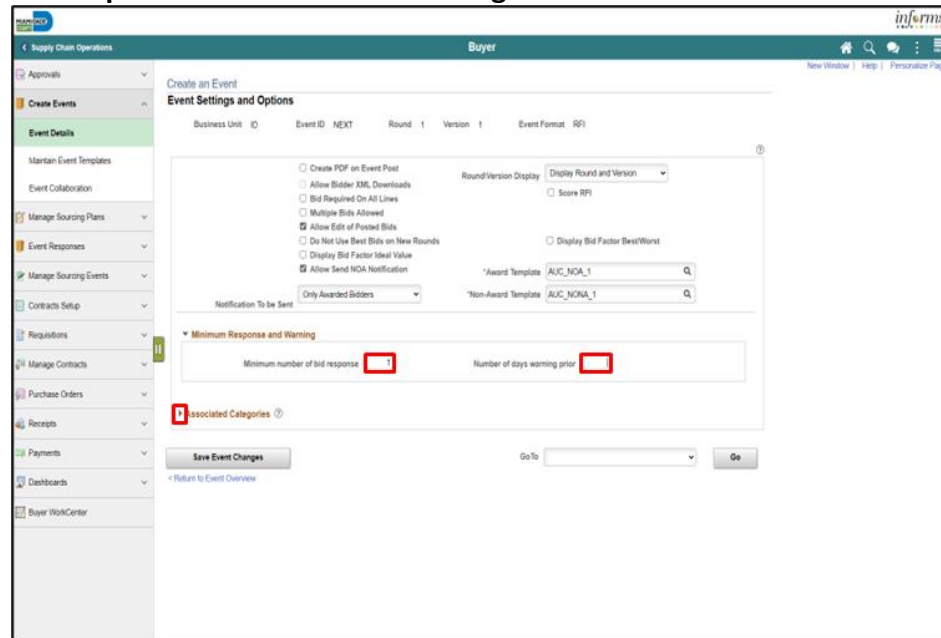
Note: This is the minimum number of bidders required to bid on the event.

10. Enter the desired information into the **Number of days warning prior** field.

Note: This is the number of days prior to the Event End Date that a warning will be sent to the creator of the event if the minimum number of bid response hasn't been met.

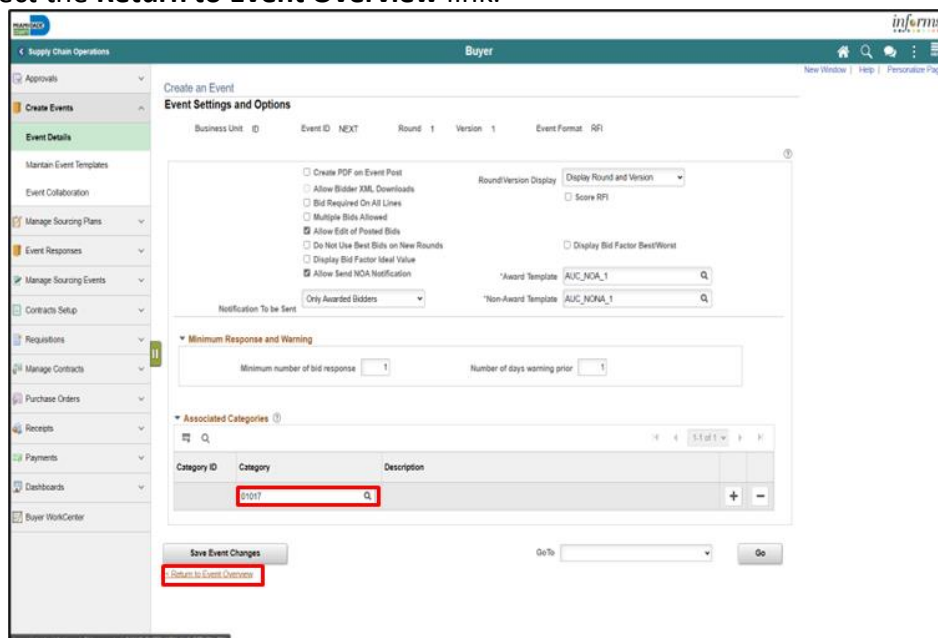
Note: Do not edit the selections in the section above.

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



12. Enter the desired information into the **Category** field.

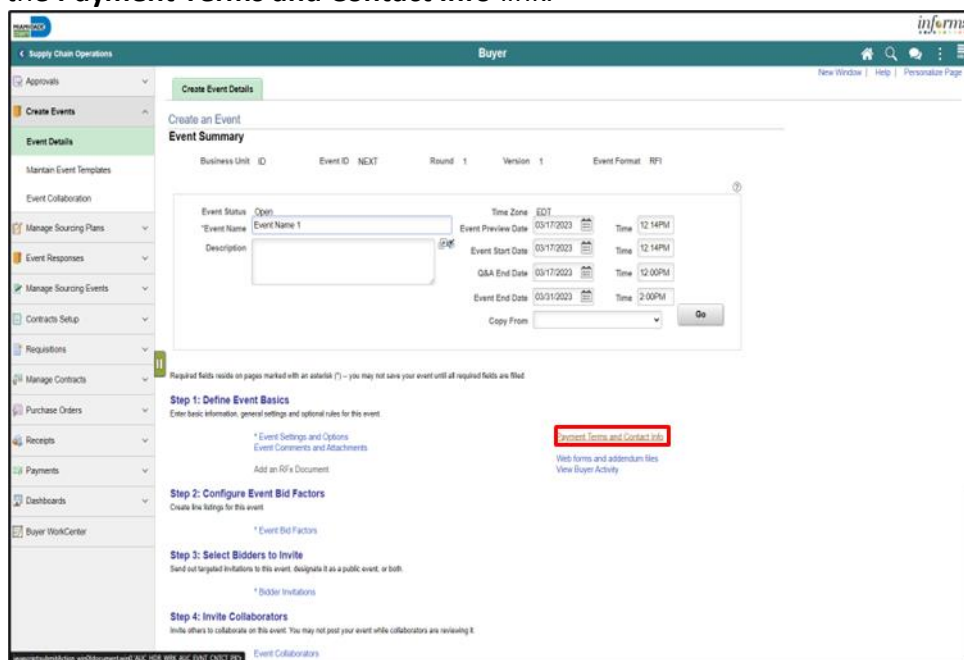
13. Select the **Return to Event Overview** link.



Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

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



15. Enter or correct **Event Contact** details.

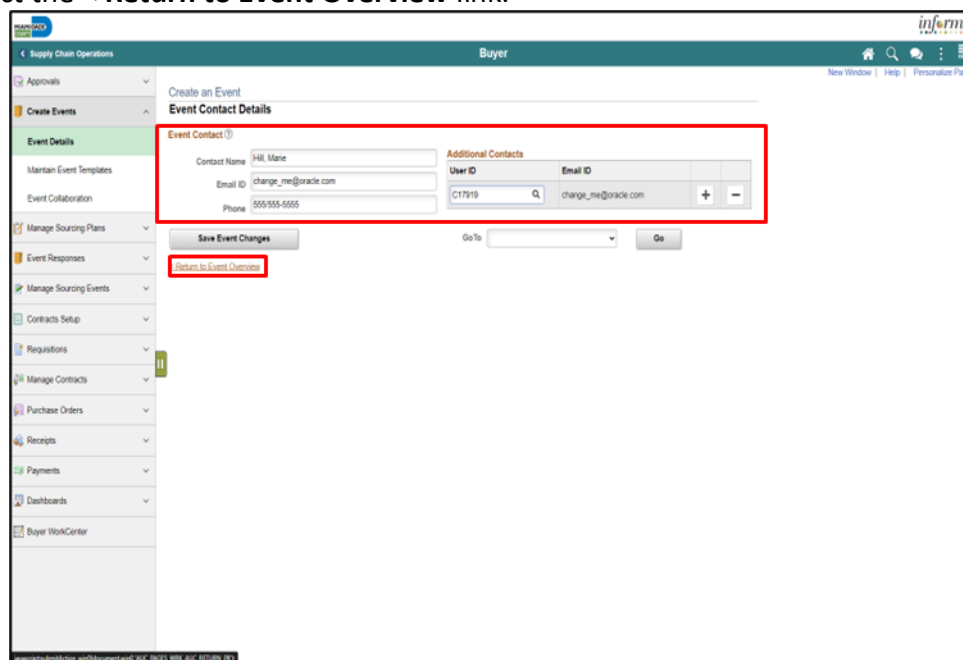
- **Contact Name**
- **Email ID**
- **Phone**

16. 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, the Clerk of the Board will be automatically notified. Additional contacts included in this section will also be notified of questions raised by bidders.

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



Lesson 1: Creating an RFI Event

[Supply Chain Operations](#)
[Buyer](#)

[New Window](#)
[Help](#)
[Personalized Page](#)

Approvals

Create Event Details

Create Events

Event Details

Manage Event Templates

Event Collaboration

Manage Sourcing Plans

Event Responses

Manage Sourcing Events

Contracts Setup

Regulations

Manage Contracts

Purchase Orders

Receipts

Payments

Dashboards

Buyer WorkCenter

Create an Event

Event Summary

Business Unit	ID	Event ID	NEXT	Round	1	Version	1	Event Format	RFI
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Event Status

Open

Time Zone

EST

Event Name

Event Name 1

Event Preview Date

03/17/2023

Time

12:14PM

Description

Event Start Date

03/17/2023

Time

12:00PM

Q&A End Date

03/17/2023

Time

12:00PM

Event End Date

03/17/2023

Time

2:00PM

Copy From

Go

Required fields reside on pages 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 Details

Event Name and Information

Add an RFI's Content

Payment Terms and Contact Info

Web forms and addendum links

View Buyer Activity

Step 2: Configure Event Bid Factors

Create bid factors for this event

Event Bid Factors

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. They may not post your event while collaborators are reviewing it.

Event Collaborators

[Home](#)
[My Account](#)
[My Alerts](#)
[My Recent](#)
[My Favorites](#)

The screenshot displays the Informa Event Management System (EMS) interface for a user with the role of 'Buyer'. The interface is divided into a sidebar on the left and a main content area on the right. The sidebar contains a list of navigation options, including 'Approvals', 'Event Details', 'Manage Sourcing Plans', 'Event Responses', 'Manage Sourcing Events', 'Contracts Setup', 'Requests', 'Attachments', 'Manage Contracts', 'Purchase Orders', 'Receipts', 'Payments', 'Dashboards', and 'Buyer WorkCenter'. The main content area is titled 'Event Comments and Attachments' and features a form for adding comments and attachments. A red box highlights the 'Add Attachment' button, and another red box highlights the 'Render Attachments' button. Below these buttons is a table with two rows of attachments. The first row is for 'PL_2023-01-28100039_372.xls' and the second row is for 'MD_HRSD1.xlsx'. Both rows have checkboxes for 'Display to Bidder' and 'Include On Award'. The 'Display to Bidder' checkbox for the first attachment is highlighted with a red box. At the bottom of the interface, there are three buttons: 'OK', 'Cancel', and 'Refresh'.

Buyer

Event Comments and Attachments

Event ID: NEXT

Enter Comments (i)

Comments:

Additional comments can go here.

☐ Send To Bidder ☐ Include On Award [Standard Comments](#)

Add Attachment **Render Attachments**

Attachments (i)

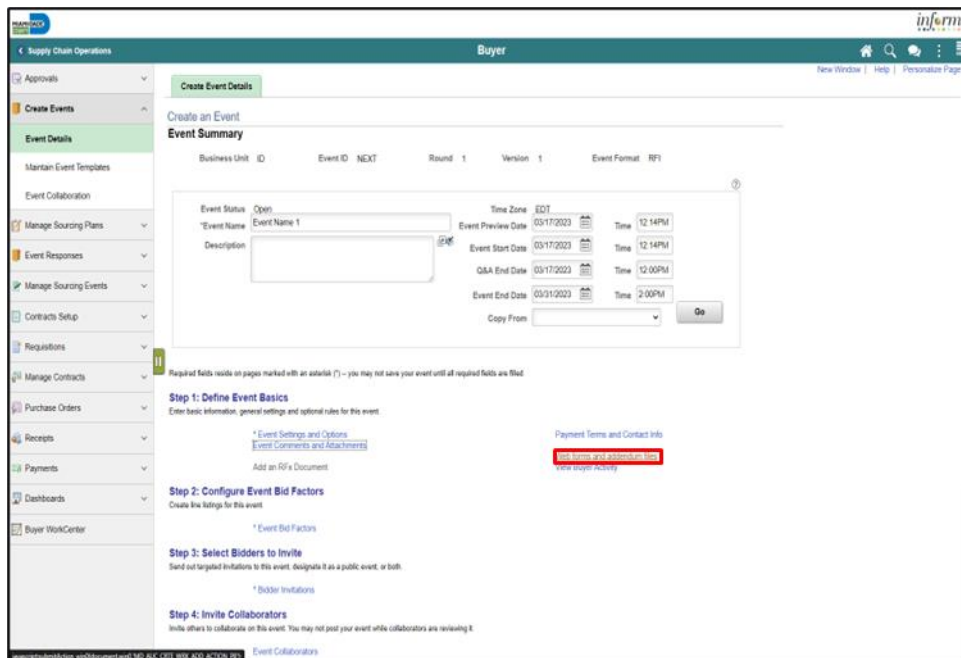
Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
PL_2023-01-28100039_372.xls	Schematics	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View ...
MD_HRSD1.xlsx	Additional details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View ...

OK **Cancel** **Refresh**

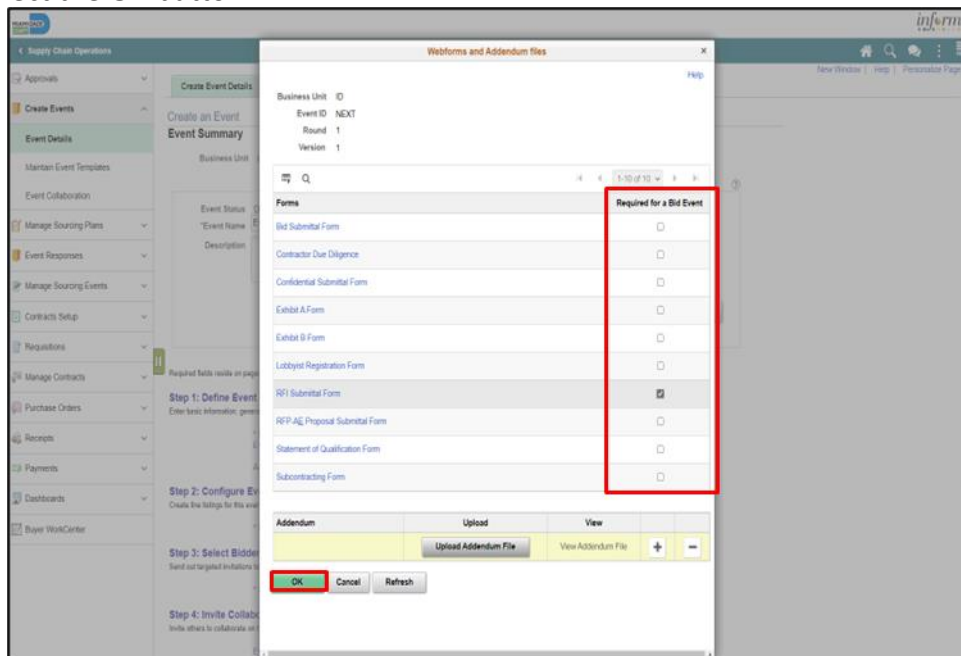
Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

22. Select the **OK** button.
23. Select the **Web forms and addendum files** link.



24. Select the **Required for a Bid Event** Option for the desired form(s). For an RFI type event, be sure to select the correct submittal form for the event (for an RTQ event, select the Bid Submittal form, for an RFP/RFQ/A&E event, select the RFP/AE submittal form, only for an actual Request for Information (RFI), select the RFI submittal form).
25. Select the **OK** button.



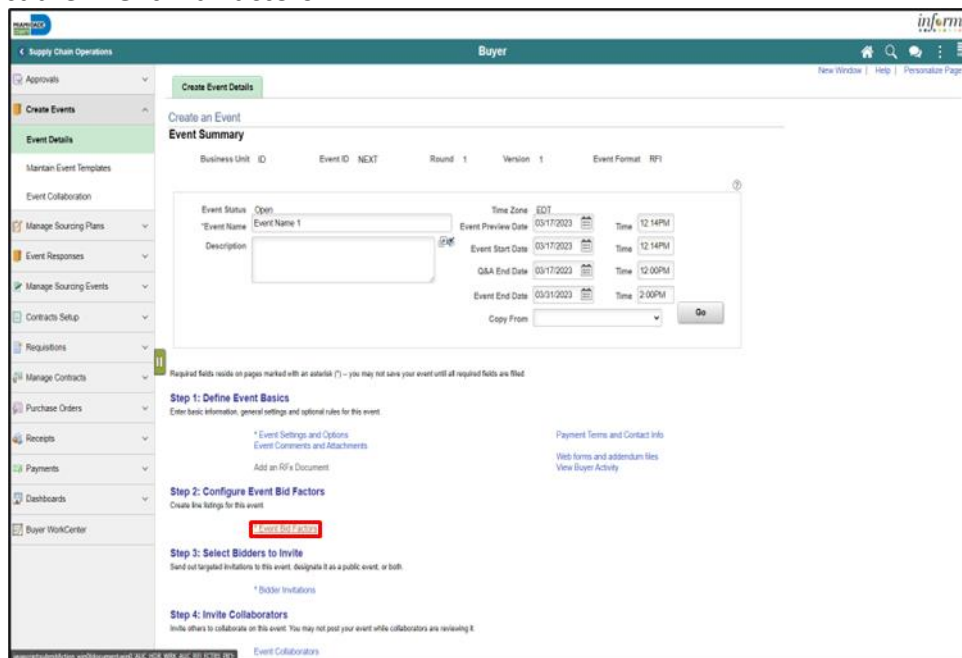
Forms	Required for a Bid Event
Bid Submittal Form	<input type="checkbox"/>
Contractor Due Diligence	<input type="checkbox"/>
Confidential Submittal Form	<input type="checkbox"/>
Exhibit A Form	<input type="checkbox"/>
Exhibit B Form	<input type="checkbox"/>
Lobbyist Registration Form	<input type="checkbox"/>
RFI Submittal Form	<input checked="" type="checkbox"/>
RFP/AE Proposal Submittal Form	<input type="checkbox"/>
Statement of Qualification Form	<input type="checkbox"/>
Subcontracting Form	<input type="checkbox"/>

Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

Step 2: Configure Event Bid Factors

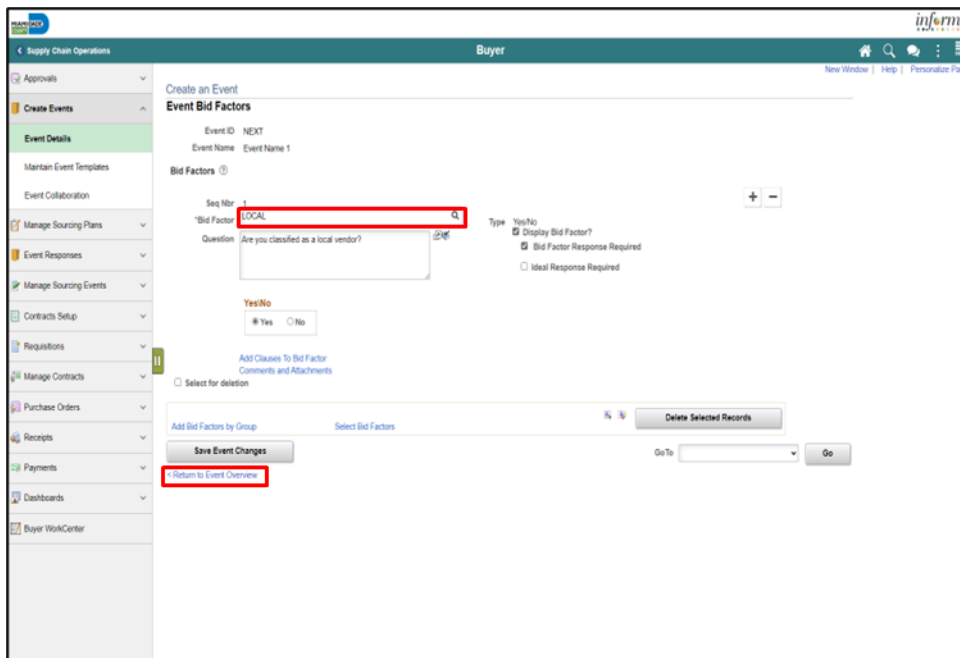
26. Select the **Event Bid Factors** link.



27. Enter or search for the **Bid Factor**.

28. Select the **Save Event Changes** button. Once bid factors are selected and saved, and Event ID will be assigned to the event.

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

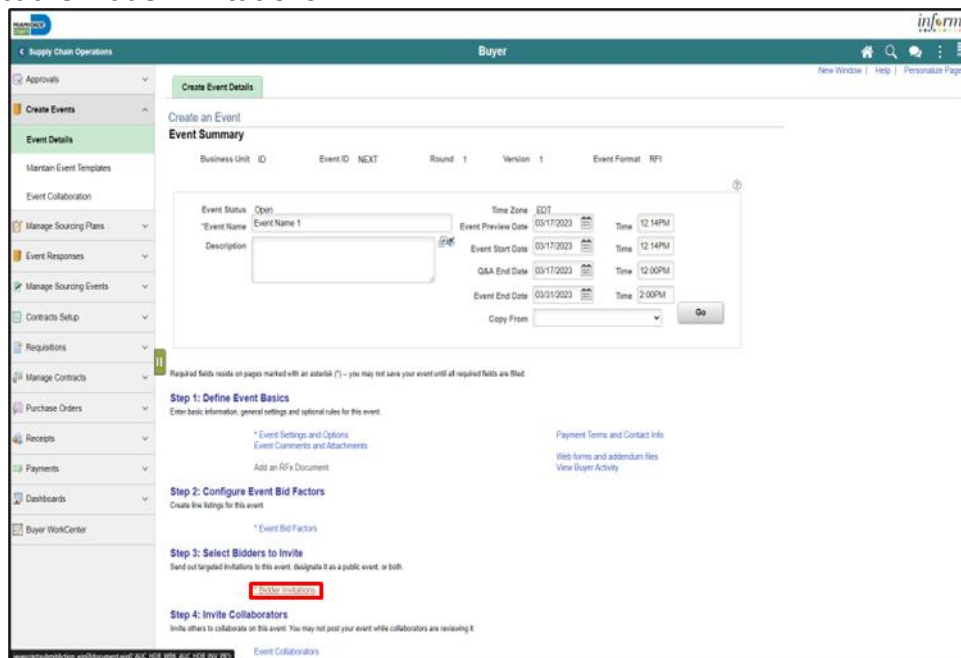


Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

Step 3: Select Bidders to Invite

30. Select the **Bidder Invitations** link.



Event Summary

Business Unit: ID: Event ID: NEXT: Round: 1 Version: 1 Event Format: RFI

Event Status: Open Event Name: Event Name 1 Time Zone: EDT Event Preview Date: 03/17/2023 Time: 12:14PM
Description: Event Start Date: 03/17/2023 Time: 12:14PM
Q&A End Date: 03/17/2023 Time: 12:00PM
Event End Date: 03/31/2023 Time: 2:00PM
Copy From: [Dropdown] Go

Required fields reside on pages 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
Add an RFI Document
Payment Terms and Contact Info
Web forms and addendum files
View Buyer Activity

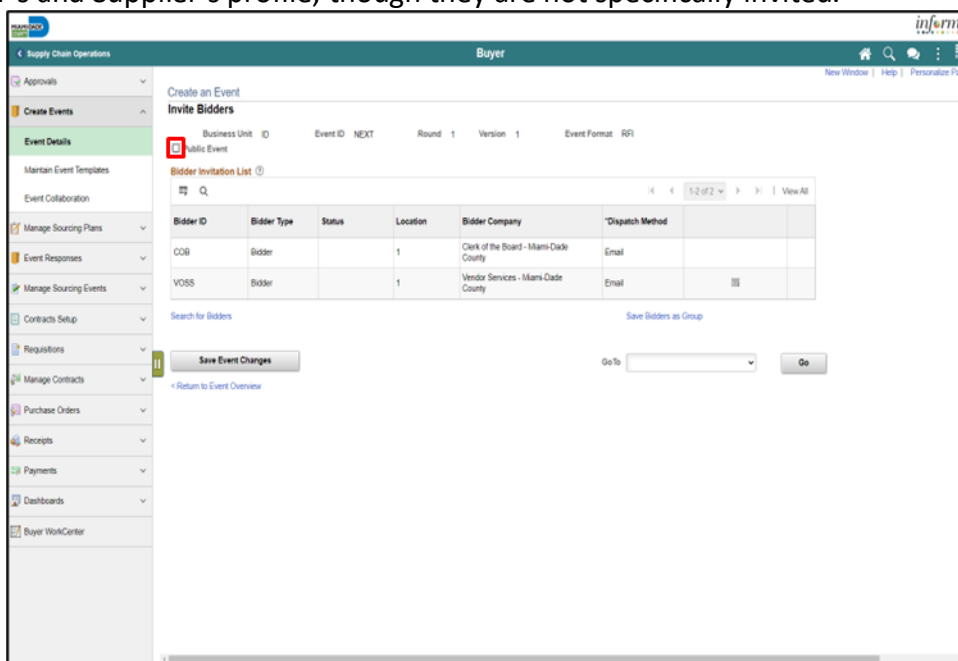
Step 2: Configure Event Bid Factors
Create the settings for this event.
* Event Bid Factors

Step 3: Select Bidders to Invite
Send out targeted invitations 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 while collaborators are reviewing it.
Event Collaborators

31. 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, though they are not specifically invited.



Invite Bidders

☒ Public Event

Bidder Invitation List

Bidder ID	Bidder Type	Status	Location	Bidder Company	Dispatch Method
COB	Bidder		1	Clerk of the Board - Miami Dade County	Email
VOSS	Bidder		1	Vendor Services - Miami Dade County	Email

Search for Bidders Save Bidders as Group

Save Event Changes Go To [Dropdown] Go

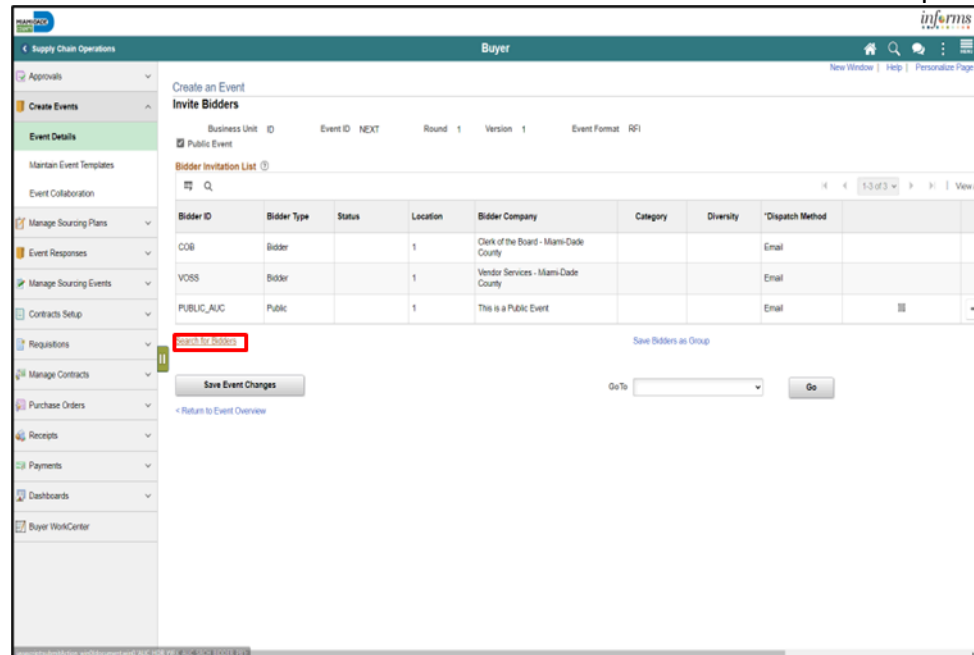
[Return to Event Overview](#)

Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

32. Select the **Search for Bidders** link.

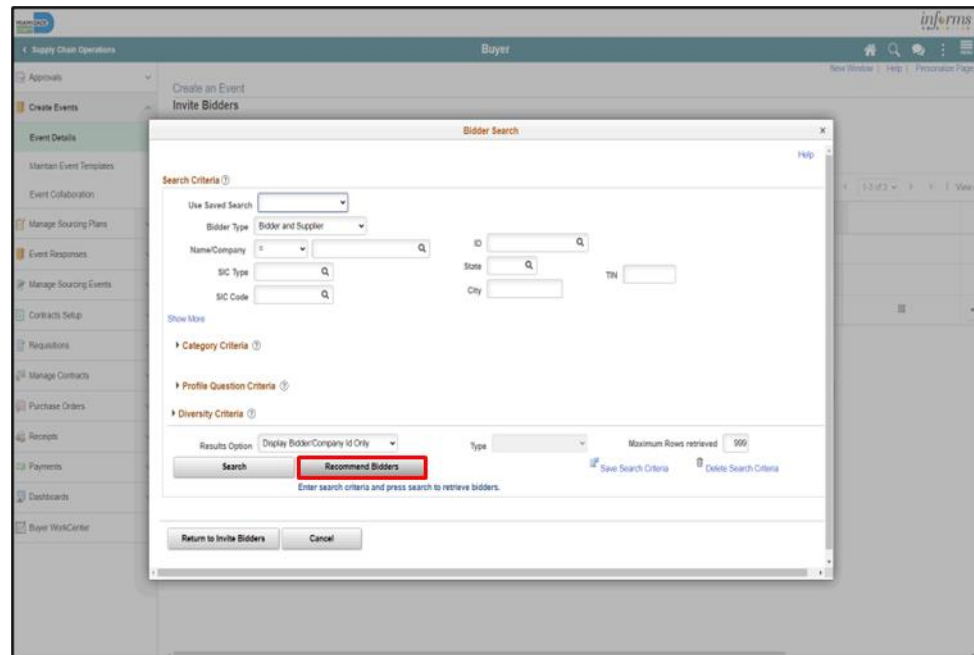
Note: Clerk of the Board and Vendor Services will be notified when the event is posted.



Bidder ID	Bidder Type	Status	Location	Bidder Company	Category	Diversity	Dispatch Method
COB	Bidder		1	Clerk of the Board - Miami-Dade County			Email
VOSS	Bidder		1	Vendor Services - Miami-Dade County			Email
PUBLIC_AUC	Public		1	This is a Public Event			Email

33. Select the **Recommend Bidders** button.

Note: Bidders should be recommended only if the event is Public. If sourcing from a bidder group, select the **Show More** link and enter the **Contract ID** in the **Group Name** field, then select the **Search** button.



Search Criteria

Use Saved Search:

Bidder Type:

Name/Company:

ID:

SIC Type:

SIC Code:

State:

City:

TIN:

Recommend Bidders

Results Option: Display Bidder/Company id Only

Type:

Maximum Rows retrieved: 999

Search **Recommend Bidders** **Save Search Criteria** **Delete Search Criteria**

Enter search criteria and press search to retrieve bidders.

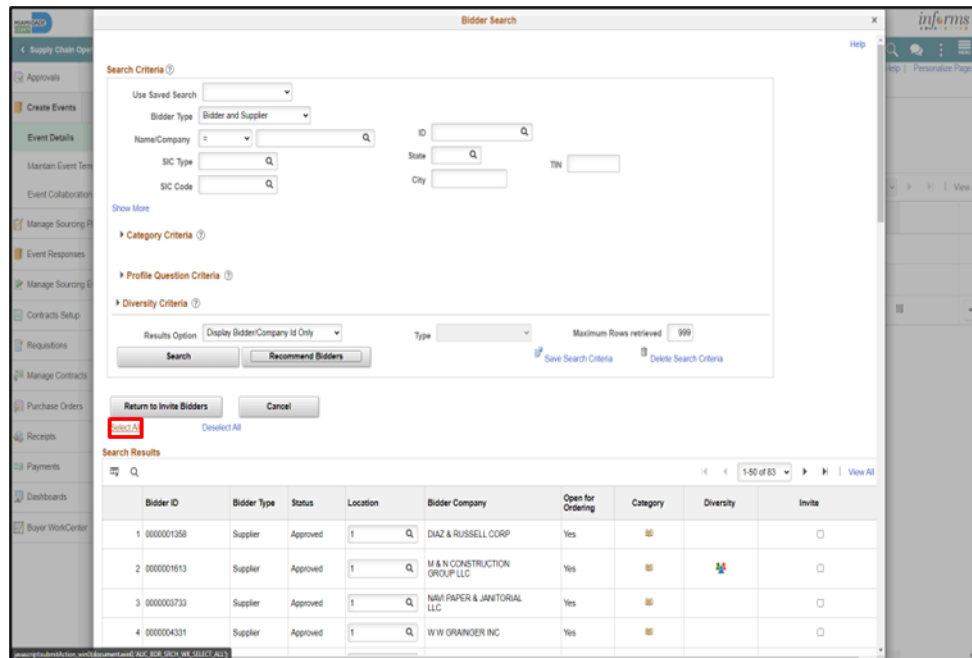
Return to Invite Bidders **Cancel**

Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

34. Select the **Select All** link.

Note: Bidders can be invited/uninvited by selecting the Invite option in the Search Results.



Search Criteria

Use Saved Search:

Bidder Type:

Name/Company:

SIC Type:

SIC Code:

ID:

State:

City:

TIN:

Show More

Category Criteria:

Profile Question Criteria:

Diversity Criteria:

Results Option:

Type:

Maximum Rows retrieved:

Search

Save Search Criteria

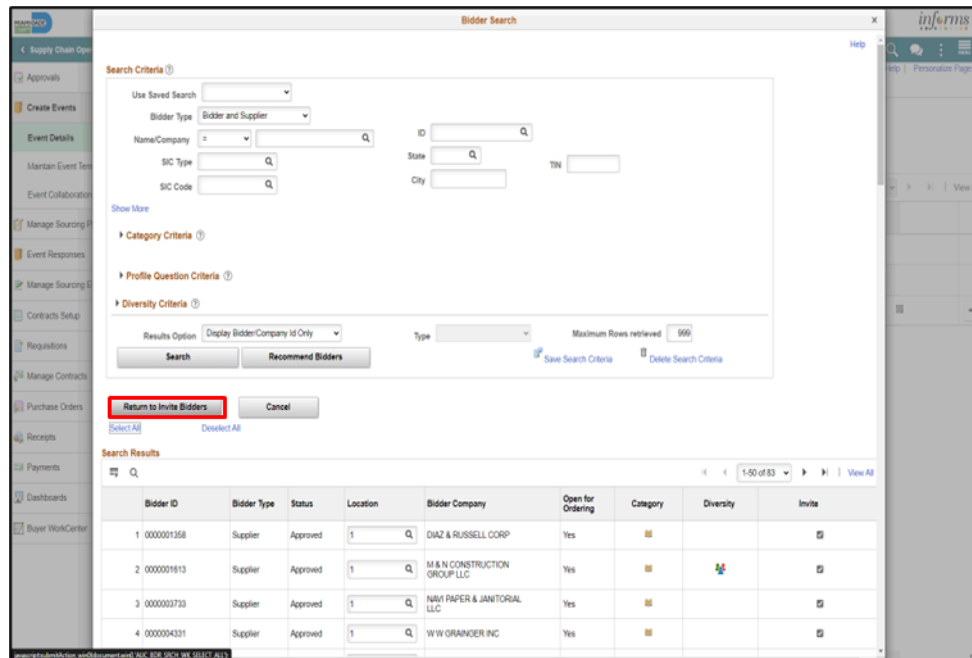
Return to Invite Bidders

Select All

Search Results

Bidder ID	Bidder Type	Status	Location	Bidder Company	Open for Ordering	Category	Diversity	Invite
1 000001358	Supplier	Approved	1	DAZ & RUSSELL CORP	Yes			<input type="checkbox"/>
2 000001913	Supplier	Approved	1	M & N CONSTRUCTION GROUP LLC	Yes			<input type="checkbox"/>
3 000003733	Supplier	Approved	1	NAM PAPER & JANITORIAL LLC	Yes			<input type="checkbox"/>
4 000004331	Supplier	Approved	1	W W GRANOER INC	Yes			<input type="checkbox"/>

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



Search Criteria

Use Saved Search:

Bidder Type:

Name/Company:

SIC Type:

SIC Code:

ID:

State:

City:

TIN:

Show More

Category Criteria:

Profile Question Criteria:

Diversity Criteria:

Results Option:

Type:

Maximum Rows retrieved:

Search

Save Search Criteria

Return to Invite Bidders

Select All

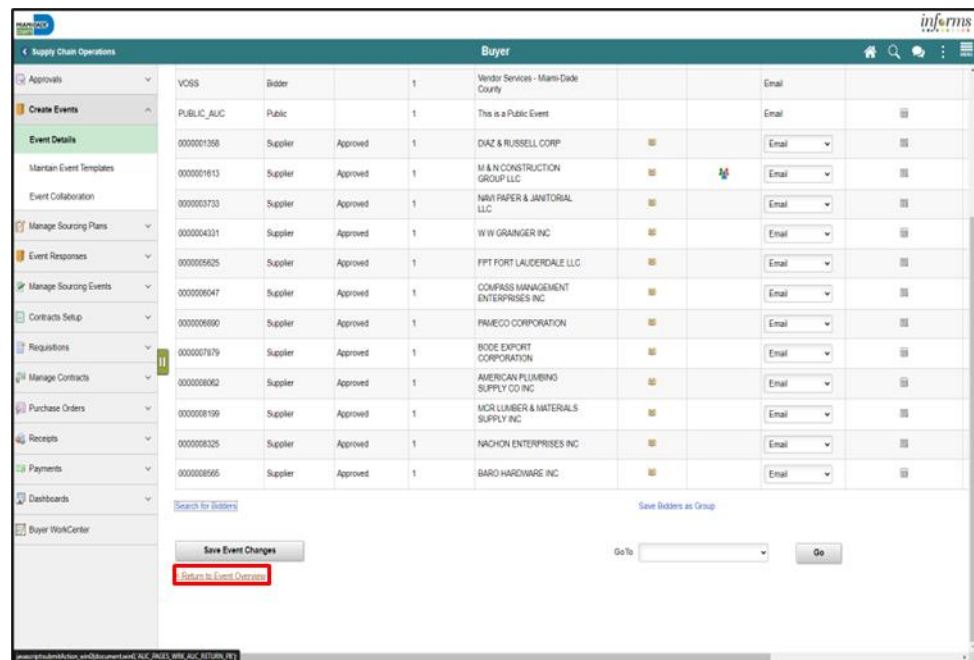
Search Results

Bidder ID	Bidder Type	Status	Location	Bidder Company	Open for Ordering	Category	Diversity	Invite
1 000001358	Supplier	Approved	1	DAZ & RUSSELL CORP	Yes			<input checked="" type="checkbox"/>
2 000001913	Supplier	Approved	1	M & N CONSTRUCTION GROUP LLC	Yes			<input checked="" type="checkbox"/>
3 000003733	Supplier	Approved	1	NAM PAPER & JANITORIAL LLC	Yes			<input checked="" type="checkbox"/>
4 000004331	Supplier	Approved	1	W W GRANOER INC	Yes			<input checked="" type="checkbox"/>

Module 2: Creating an RFI Event

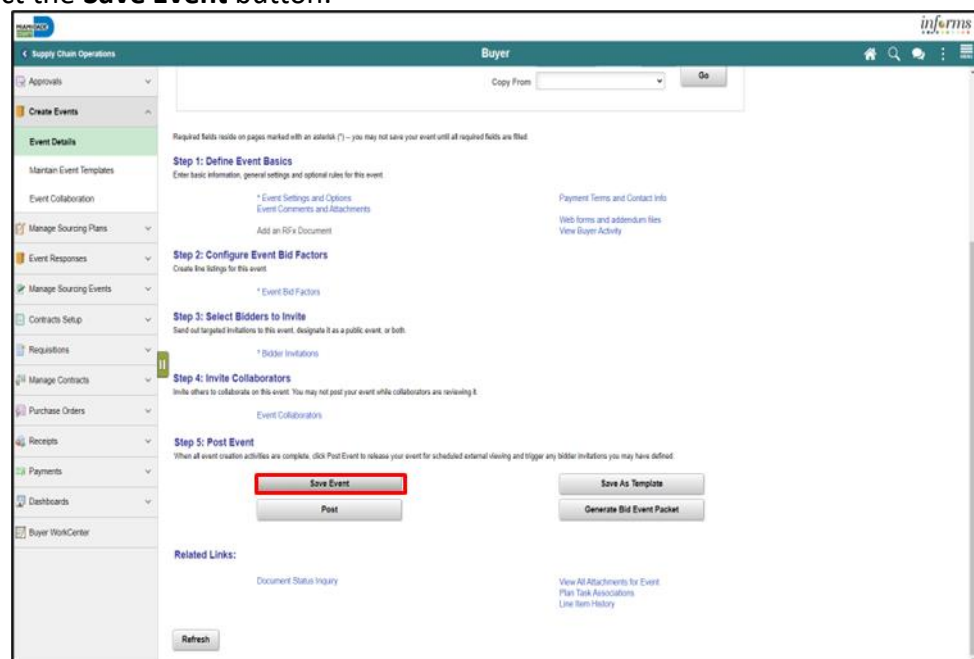
Lesson 1: Creating an RFI Event

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



The screenshot shows the 'Buyer' interface with a list of events. The 'Return to Event Overview' link is highlighted in red. The interface includes a sidebar with navigation options like Approvals, Create Events, Event Details, etc. The main area displays a table of events with columns for Event ID, Name, Status, and Actions. The 'Return to Event Overview' link is located at the bottom of the table.

37. Select the **Save Event** button.

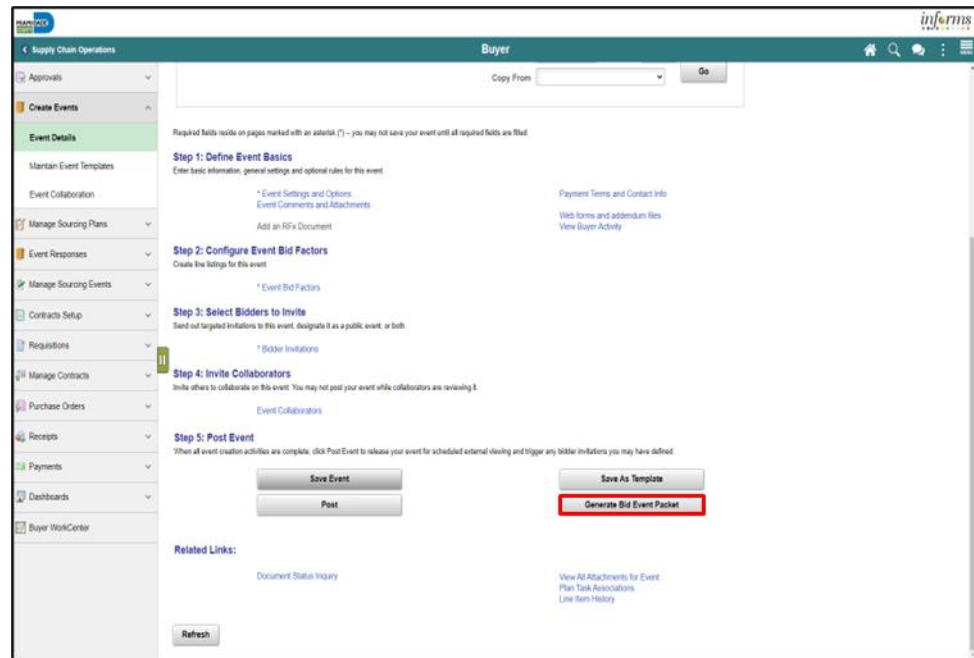


The screenshot shows the 'Buyer' interface with the 'Save Event' button highlighted in red. The interface displays a form for creating an event, with sections for 'Step 1: Define Event Basics', 'Step 2: Configure Event Bid Factors', 'Step 3: Select Bidders to Invite', 'Step 4: Invite Collaborators', and 'Step 5: Post Event'. The 'Save Event' button is located at the bottom of the form.

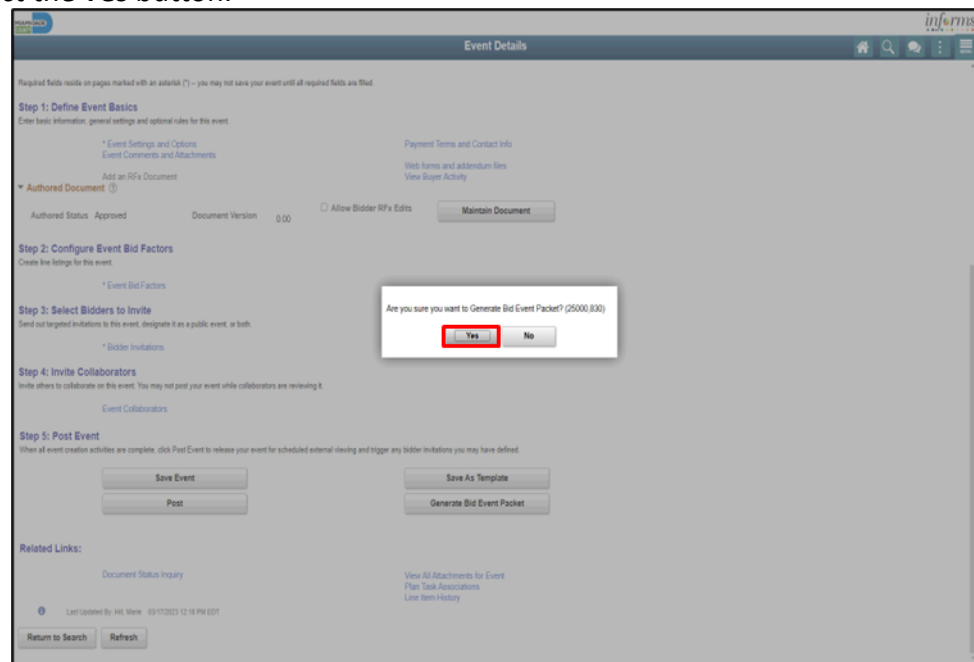
Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

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



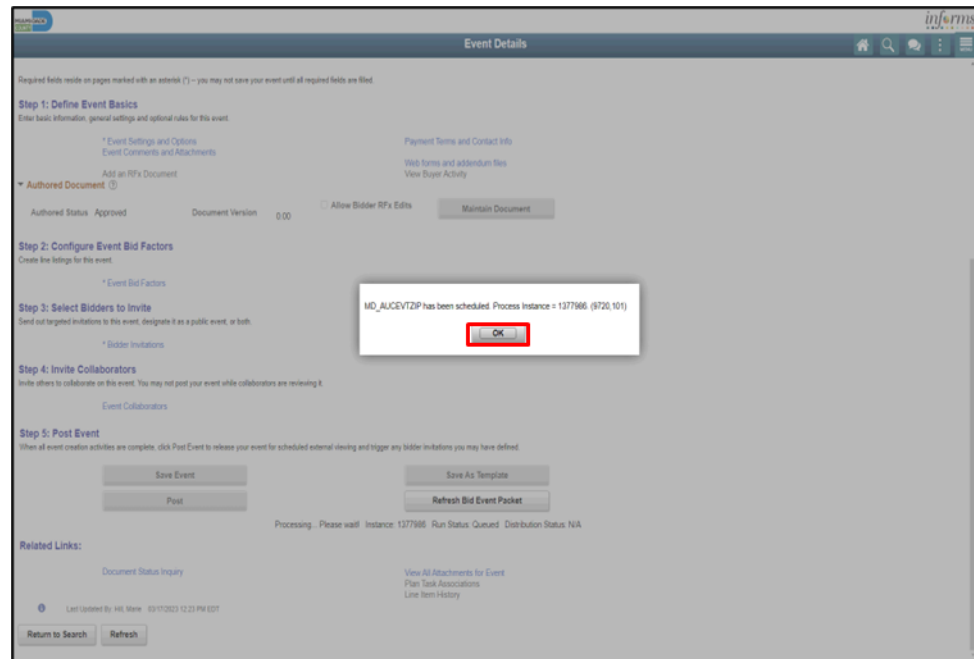
39. Select the **Yes** button.



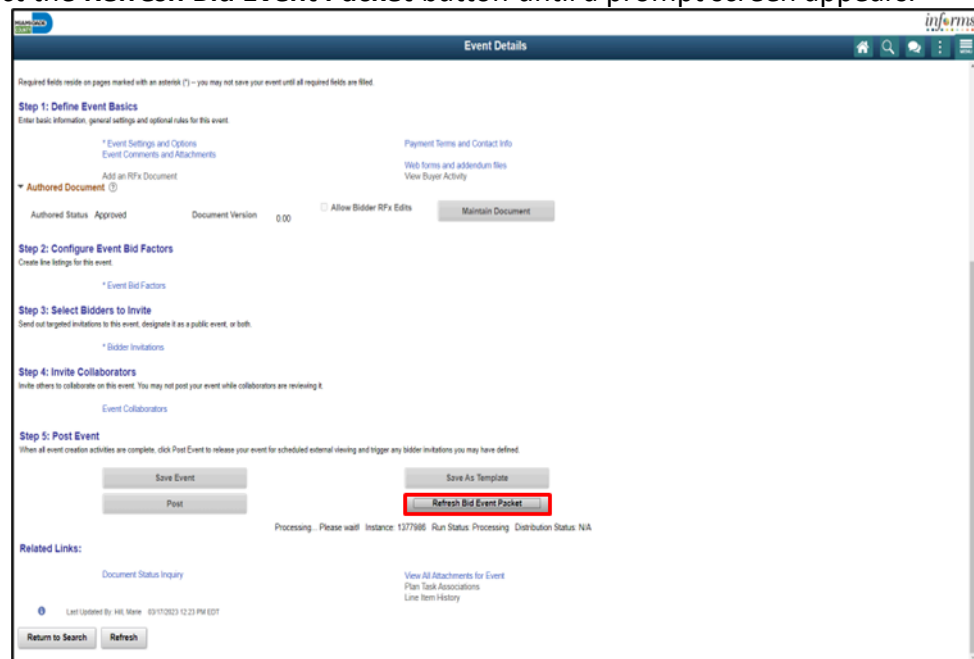
Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

40. Select the **OK** button.



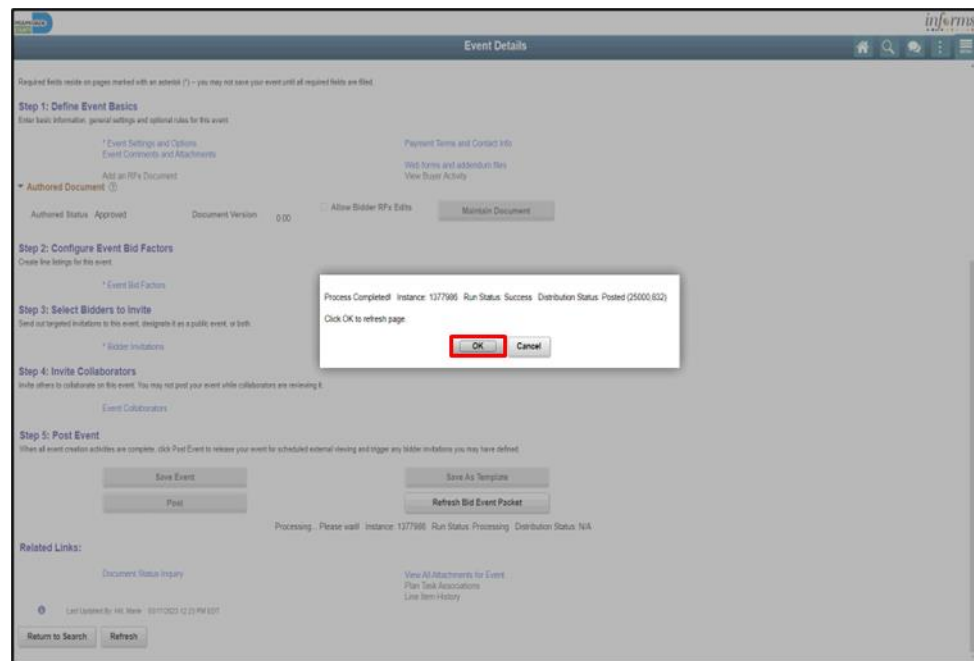
41. Select the **Refresh Bid Event Packet** button until a prompt screen appears.



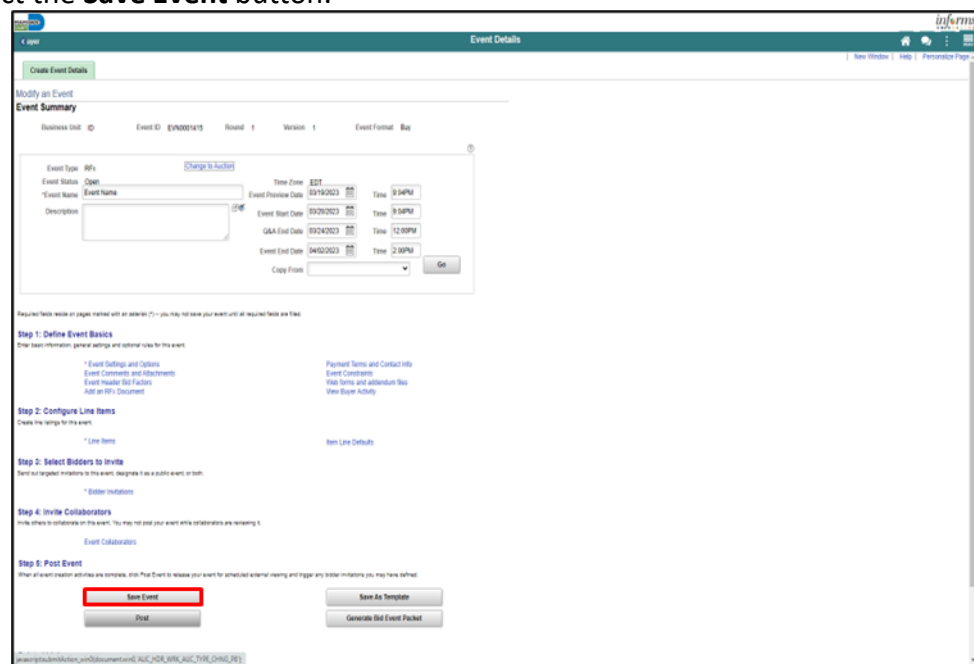
Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

42. Select the **OK** button.



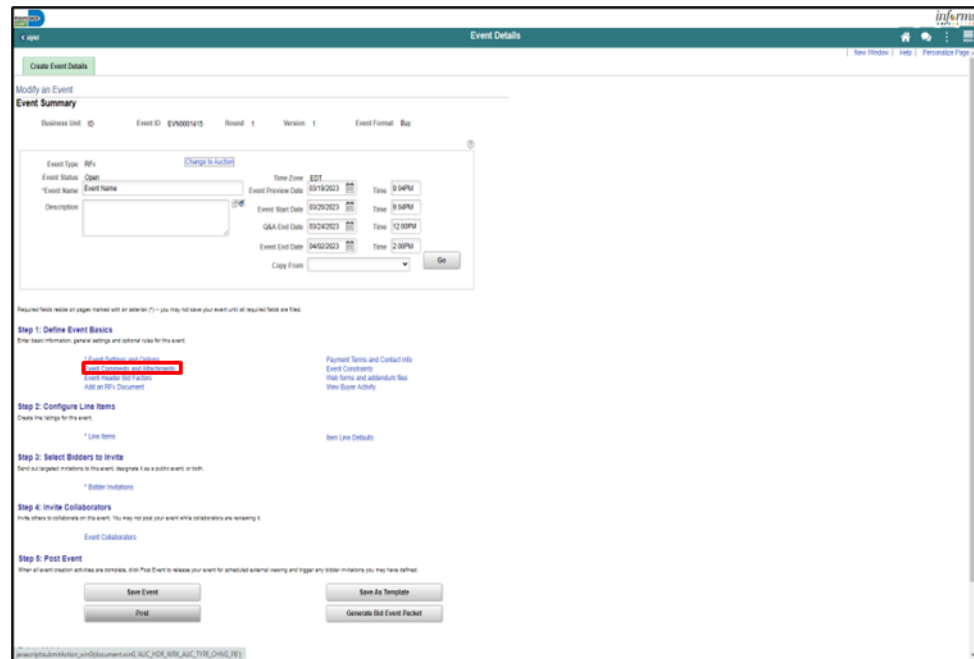
43. Select the **Save Event** button.



Module 2: Creating an RFI Event

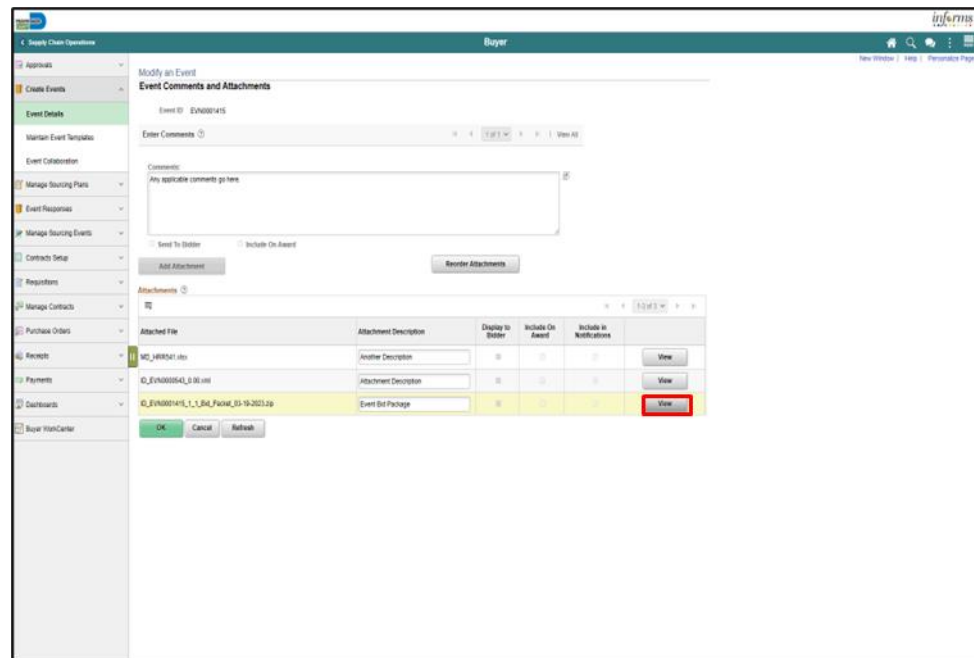
Lesson 1: Creating an RFI Event

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



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

45. Select the **View** button.

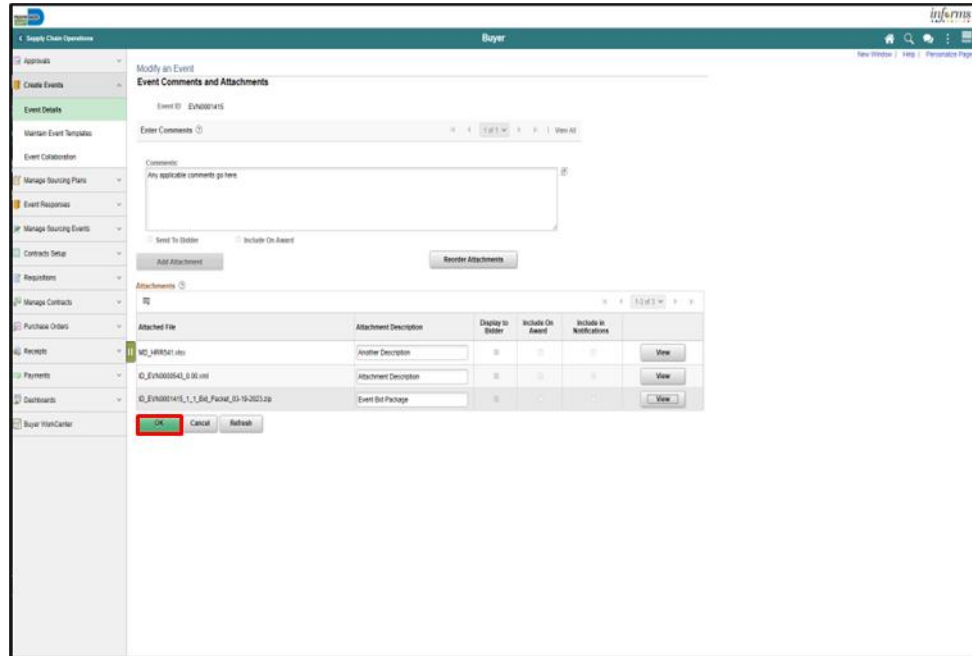


Attachment	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	View
MD_HRM541.doc	Another Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
ID_EVN000044_000000	Attachment Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
ID_EVN000141_1_1_04_Packet_03-19-2023.zip	Event Bid Package	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View

Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

46. Select the **OK** button.



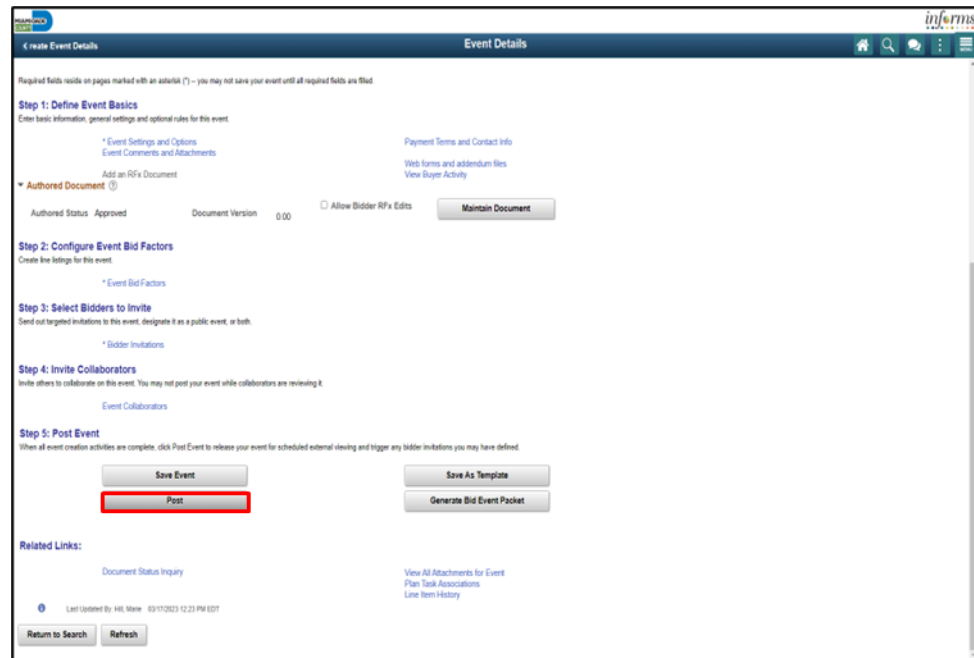
The screenshot shows the 'Modify an Event' page in the Buyer interface. The page is titled 'Event Comments and Attachments' and displays the 'Event ID' as EVN0001415. The 'Enter Comments' section has a text area with the placeholder 'Any applicable comments go here'. Below this, there are checkboxes for 'Send To Bidder' and 'Include On Award', and buttons for 'Add Attachment' and 'Reorder Attachments'. The 'Attachments' section shows a table with three rows of attachments, each with a 'View' button. At the bottom of the page, the 'OK' button is highlighted with a red box, along with 'Cancel' and 'Refresh' buttons.

Attached File	Attachment Description	Display To Bidder	Include On Award	Include In Notifications	
MDL_HRM041.xls	Another Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
ID_EVN0001415_0-06.xls	Attachment Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
ID_EVN0001415_1_1_LRM_Packet_03-19-2023.zip	Event Bid Package	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View

Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

48 Select the **Post** button.



Event Details

Required fields reside on pages 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
- Payment Terms and Contact Info
- Web forms and addendum files
- View Buyer Activity

Authorized Document
Add an RFI Document

Authorized Status: Approved Document Version: 0.00 ☐ Allow Bidder RFI Edits **Maintain Document**

Step 2: Configure Event Bid Factors
Create line settings for this event.

- * Event Bid Factors

Step 3: Select Bidders to Invite
Send out targeted invitations 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 while collaborators are reviewing it.

Event Collaborators

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event **Save As Template**
Post **Generate Bid Event Packet**

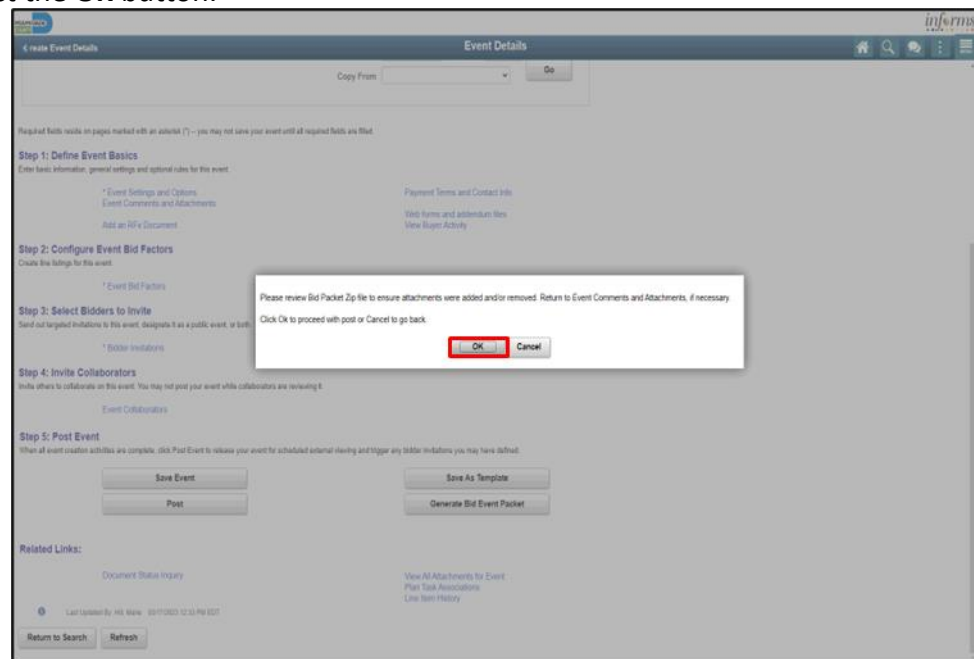
Related Links:

- Document Status Inquiry
- View All Attachments for Event
- Plan Task Associations
- Line Item History

Last Updated By: HIL, Marie 03/17/2023 12:23 PM EDT

Return to Search **Refresh**

49 Select the **OK** button.



Event Details

Copy From: **Go**

Required fields reside on pages 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
- Payment Terms and Contact Info
- Web forms and addendum files
- View Buyer Activity

Step 2: Configure Event Bid Factors
Create line settings for this event.

- * Event Bid Factors

Step 3: Select Bidders to Invite
Send out targeted invitations 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 while collaborators are reviewing it.

Event Collaborators

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event **Save As Template**
Post **Generate Bid Event Packet**

Related Links:

- Document Status Inquiry
- View All Attachments for Event
- Plan Task Associations
- Line Item History

Last Updated By: HIL, Marie 03/17/2023 12:30 PM EDT

Return to Search **Refresh**

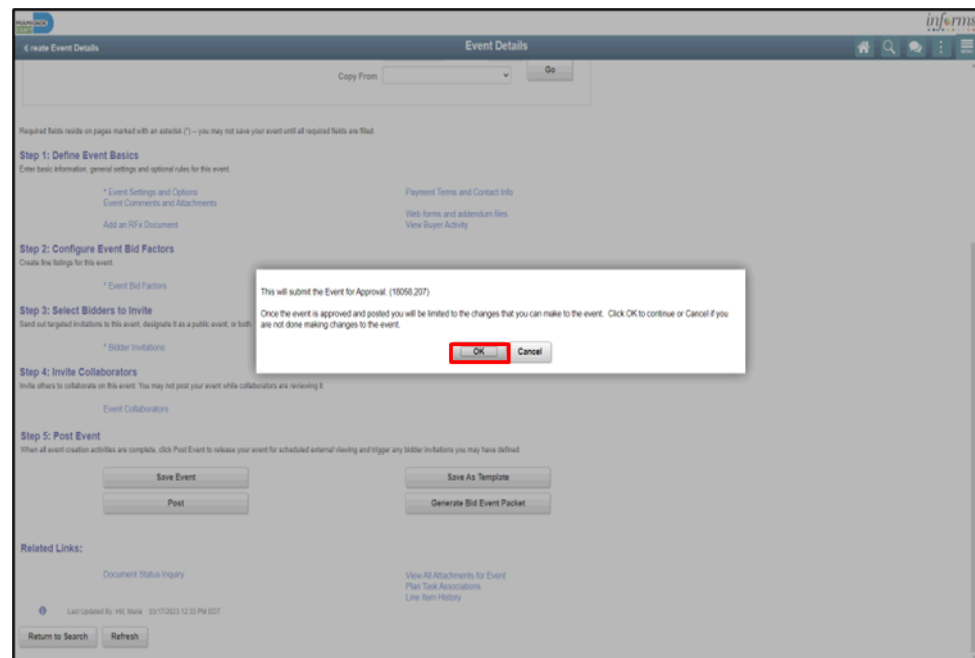
Please review Bid Packet Zip file to ensure attachments were added and/or removed. Return to Event Comments and Attachments, if necessary. Click OK to proceed with post or Cancel to go back.

OK **Cancel**

Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

50. Select the **OK** button.



Module 2: Creating an RFI Event

Module 2: Creating an RFI Event Summary

Now that the lesson has been completed, the user should be able to:

- Create an RFI Event
- Import an Rfx Document



Module 3: Creating a Buy Event

Lessons

This module includes the following lessons:

- Create a Buy Event
- Import an RFx Document

Module 3: Creating a Buy Event

Module 1: Overview

At the conclusion of this lesson, the user will be able to:

- Create a Buy Event
- Import an RFx Document

Module 3: Creating a Buy Event

Lesson 1: Introduction

Buy Events are used to gather specific information and pricing and/or proposals for evaluation and award of specific items/services/projects to specific bidders. These are typically Invitation to Bid solicitations (ITB).

Module 3: Creating a Buy Event

Key Terms

The following key terms are used in this lesson:



Term	Definition
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. Note: The Event Preview Date and the Event Start Date should be the same.
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 INFORMS buyers. Be sure the time is set for 12:00 PM. Note: The date must be after the start date and at least 3-5 days prior to End Date .
Event End Date	The date when the bidding closes. Be sure the time is set for 2:00 PM.
Send to Bidder (Comments)	Select to enable the Bidder to see the comment.
Display to Bidder (Attachment)	Select this check box if this attachment is to be available to Bidders and part of the Bid Packet pdf file.
Generate Bid Event Packet	Select this to run the process to generate the Bid Packet. All event attachments, marked Display to Bidder, are merged into a .pdf file format.

Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

Navigate to: **Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer**

When creating a new event:

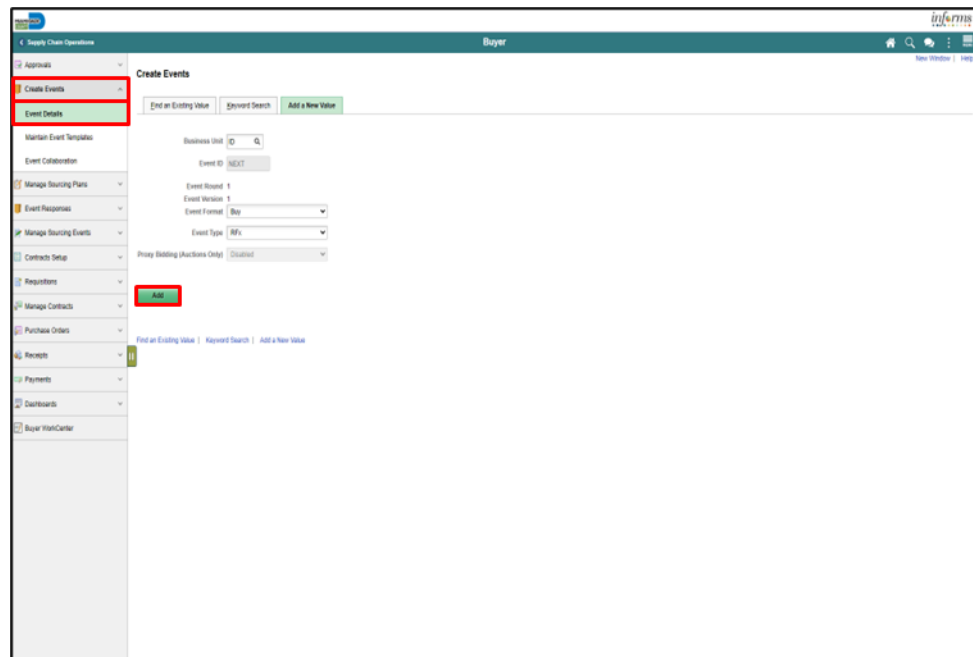
1. Select **Create Events** in the navigation pane.
2. Select **Event Details** in the navigation pane.
3. Select **Buy** from the **Event Format** list.
4. Select **RFx** from the **Event Type** list.
5. Select the **Add** button.

When modifying an event:

1. Select **Manage Sourcing Events** in the navigation pane.
2. Select **Event Workbench** in the navigation pane.
3. Search for the event to modify.

Note: The Legend can be expanded to explain the icon definitions.

4. Select the **New Version** icon on the line of the event to modify.
5. Select **Yes**.
6. Enter the modifications to the event.
7. Select **Save Event**.
8. Select **Post**.



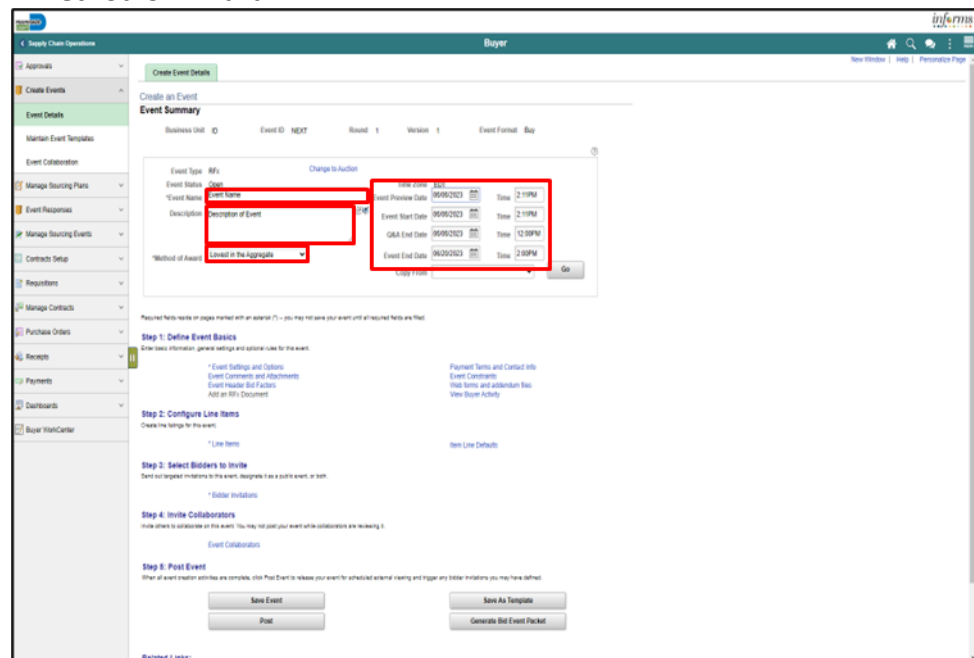
Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

6. Enter the desired information into the **Event Name** field.
 7. 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.
8. Enter the desired information into the date fields.
 - **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 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.

- **Event Name:** Enter the name of the event.
- **Event Description:** Enter a brief description of the project.
- **Method of Award**



The screenshot shows the 'Create Event Details' form in the INFORMS system. The form is titled 'Create an Event' and shows the 'Event Summary' tab. Red boxes highlight the 'Event Name', 'Description of Event', 'Event Start Date', 'Event End Date', and 'Q&A End Date' fields. The 'Event Name' field contains 'RFI'. The 'Description of Event' field contains 'RFI'. The 'Event Start Date' is set to 06/09/2023 at 2:00 PM. The 'Event End Date' is set to 06/09/2023 at 12:00 PM. The 'Q&A End Date' is set to 06/09/2023 at 2:00 PM. The 'Method of Award' is set to 'Award in the Aggregate'. The form also includes a 'Go' button and a 'Copy Fields' button.

Module 3: Creating a Buy Event

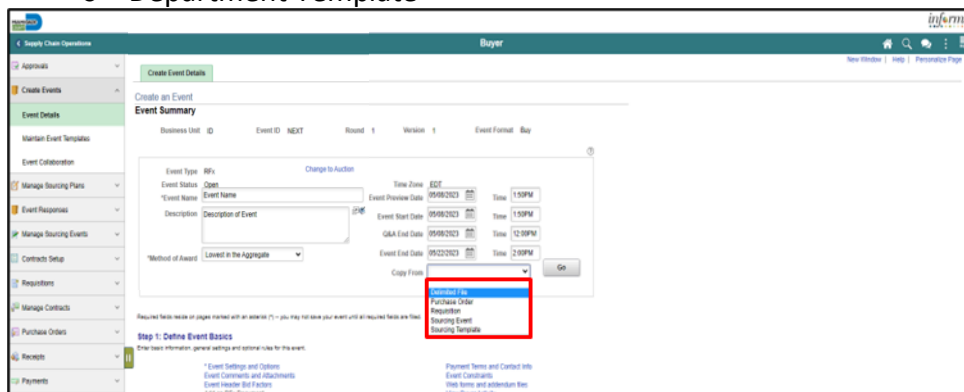
Lesson 1: Creating a Buy Event

Note: The user can utilize the **Copy From** function to utilize existing information:

- Delimited File
 - Utilize template to upload Line Details or Line Bid Factors
- Purchase Order
 - Syncs the process in INFORMS
- Requisition
 - Links the process in INFORMS and copies over all Line Details and attachments. Buyers are required to review the attachments and select “Send to Bidder”
- Sourcing Event
 - Copy all line details, and bidders from an existing Sourcing Event (any attachments will need to be re-attached).
 - This does not copy over any Web Form and Addendums
 - Bid factors can be copied over but must be checked off.

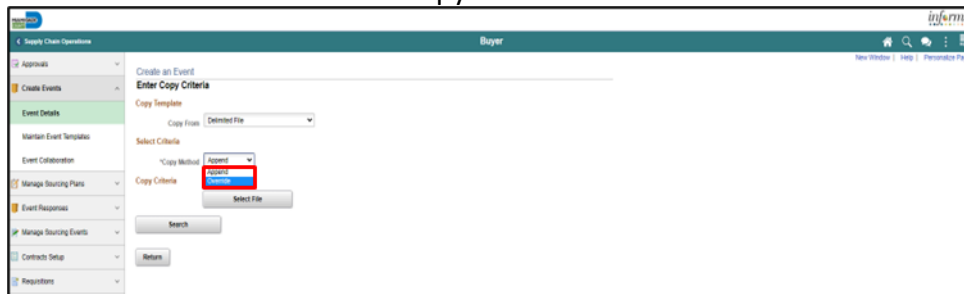
☒ Copy Event Factors\Constraints

- Sourcing Template
 - Personal Template
 - Department Template



There are (2) Copy Methods:

- Append
 - Appending will add the information being copied to the details already in the event.
- Override
 - Overriding will remove any details and replace them with the information from the copy source.

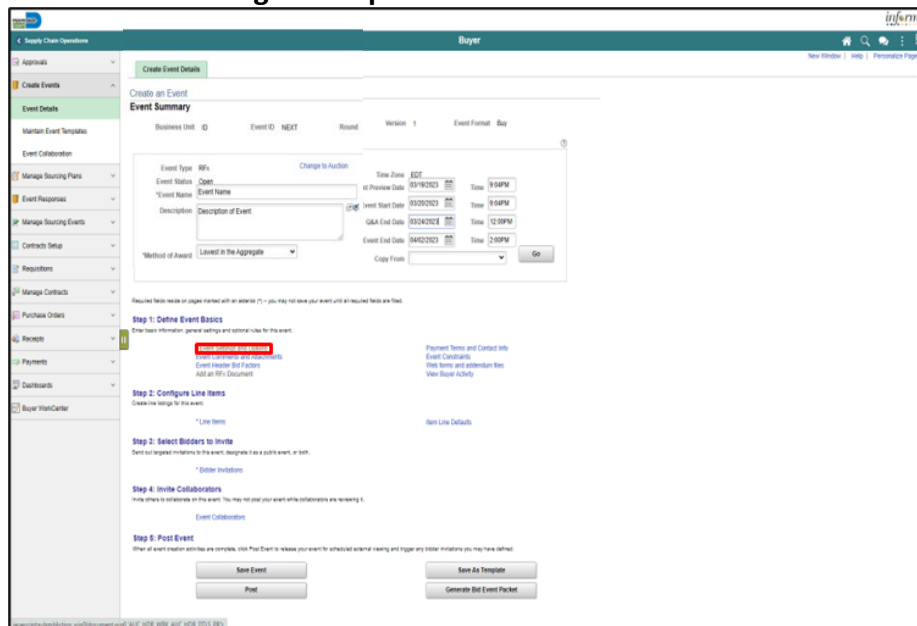


Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

Step 1: Define Event Basics

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



10. Enter the desired information into the **Minimum number of bid response** field.

Note: This is the minimum number of bidders required to bid on the event.

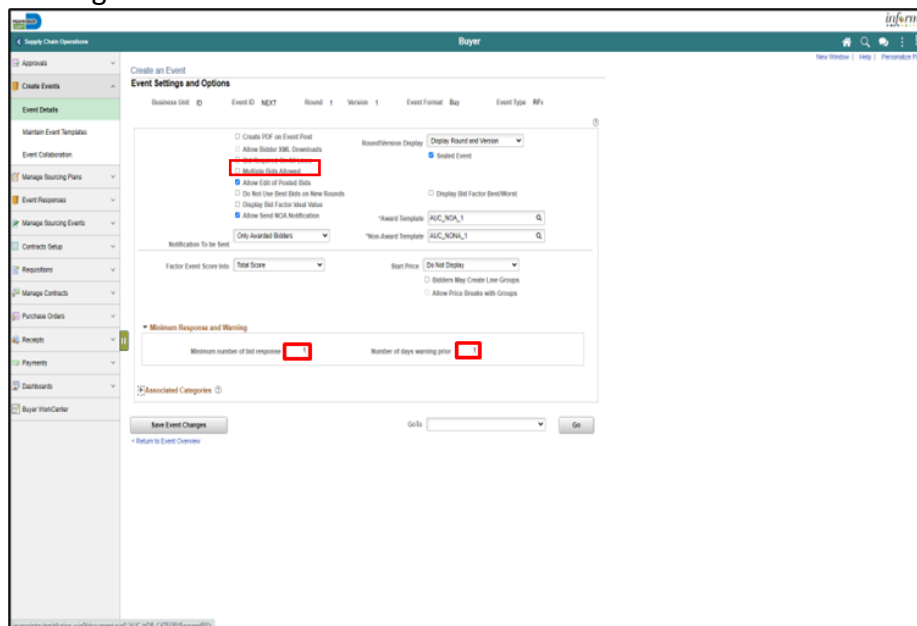
11. Enter the desired information into the **Number of days warning prior** field.

Note: This is the number of days prior to the Event End Date that a warning will be available to the creator of the event if the minimum number of bid response hasn't been met. This notification can be found under the **My Sourcing Events** tile.

Note: Do not edit the selections in the section above.

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

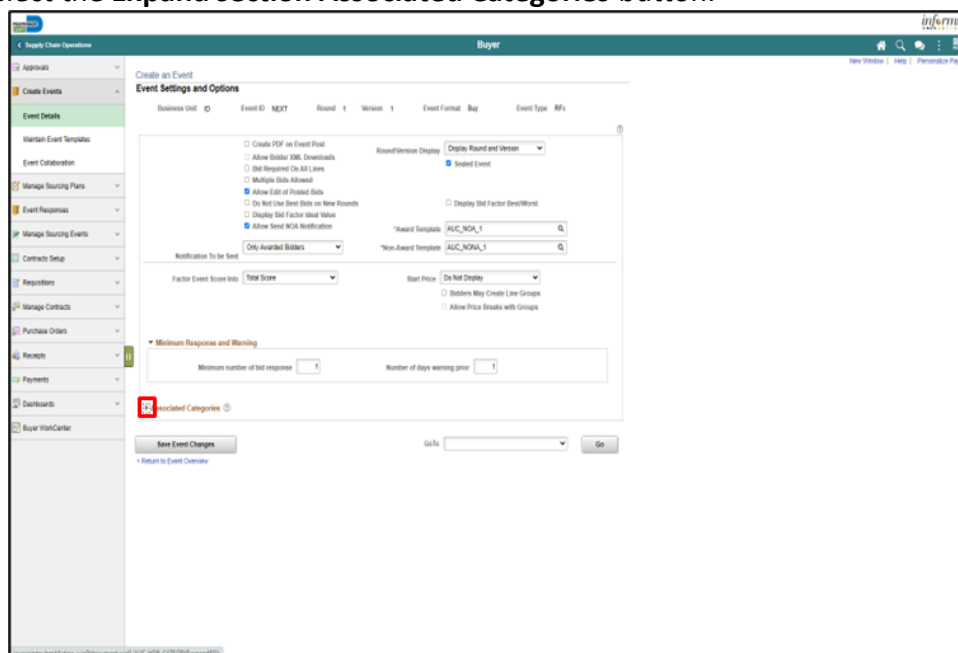
Note: Selecting this will remove the bidder's "No Bid" checkbox for all lines.



Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

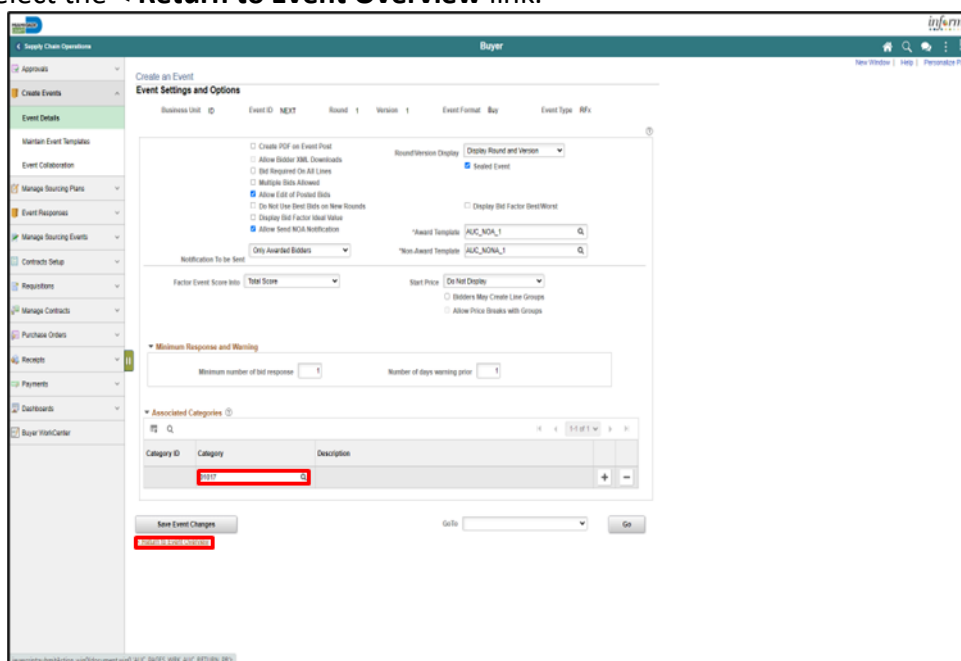
13. Select the **Expand section Associated Categories** button.



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

Note: The associated **Category** field is not a required field when requesting prices through an established pre-qualification pool contract. To request pricing for spot market quotations leading to a small purchase order (SPO) or a new contract, it is recommended that a category is inputted. When a category is input, the **Recommended Bidders** button will show bidders associated to that category.

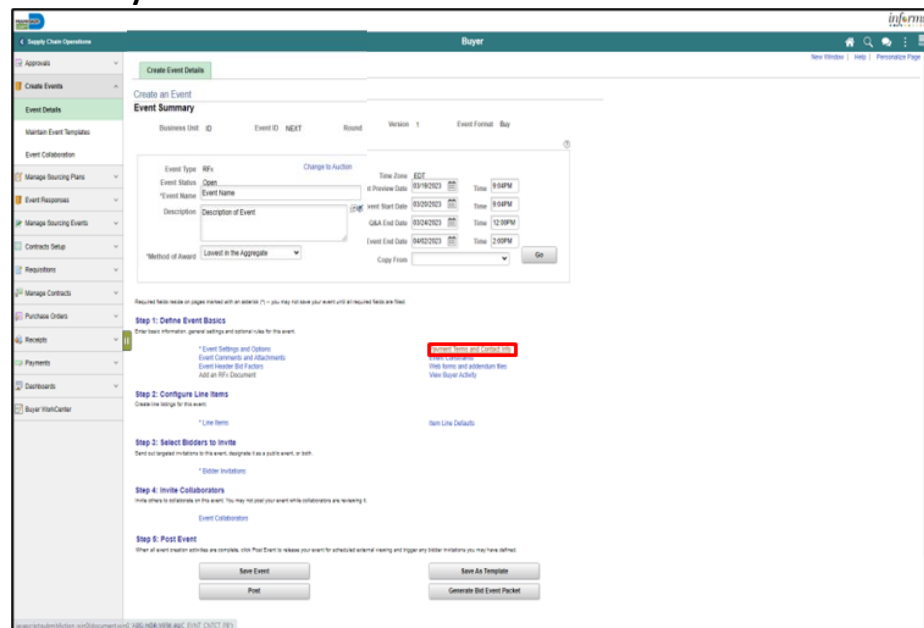
15. Select the **< Return to Event Overview** link.



Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

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



17. Enter or correct **Event Contact** details.

- **Contact Name**
- **Email ID**
- **Phone, if desired**

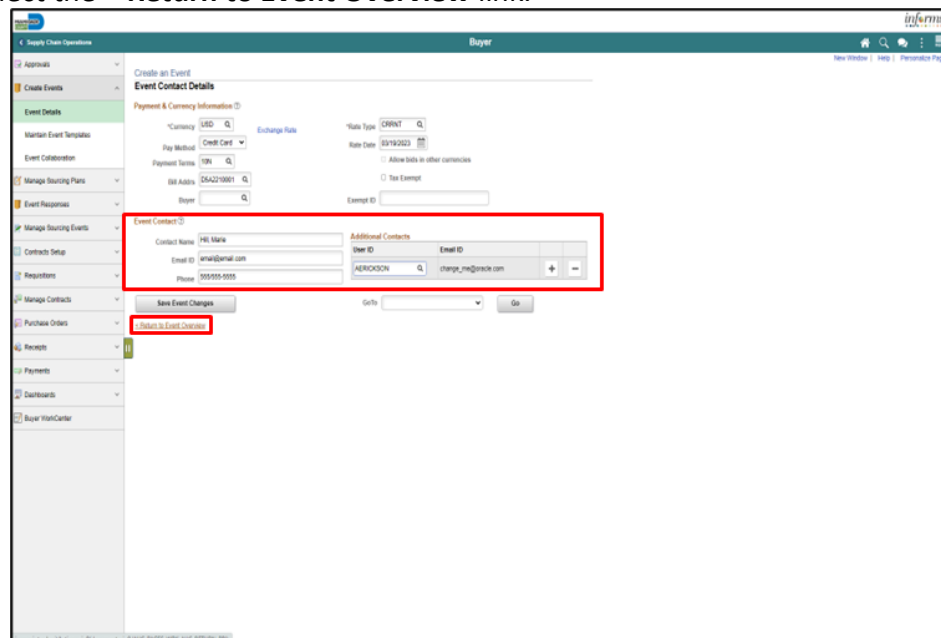
18. Enter or search for **Additional Contacts**.

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

Note: If any questions are asked by bidders, the Clerk of the Board will be automatically notified. Additional contacts included in this section will also be notified of questions raised by bidders.

19. Select the **Save Event Changes** button, if any changes are made.

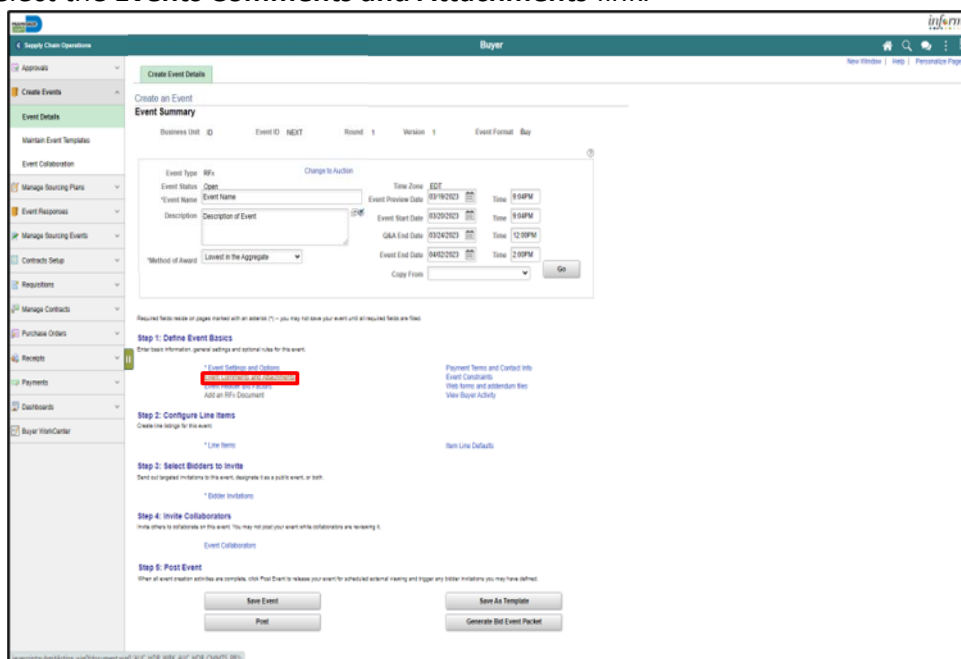
20. Select the **< Return to Event Overview** link.



Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

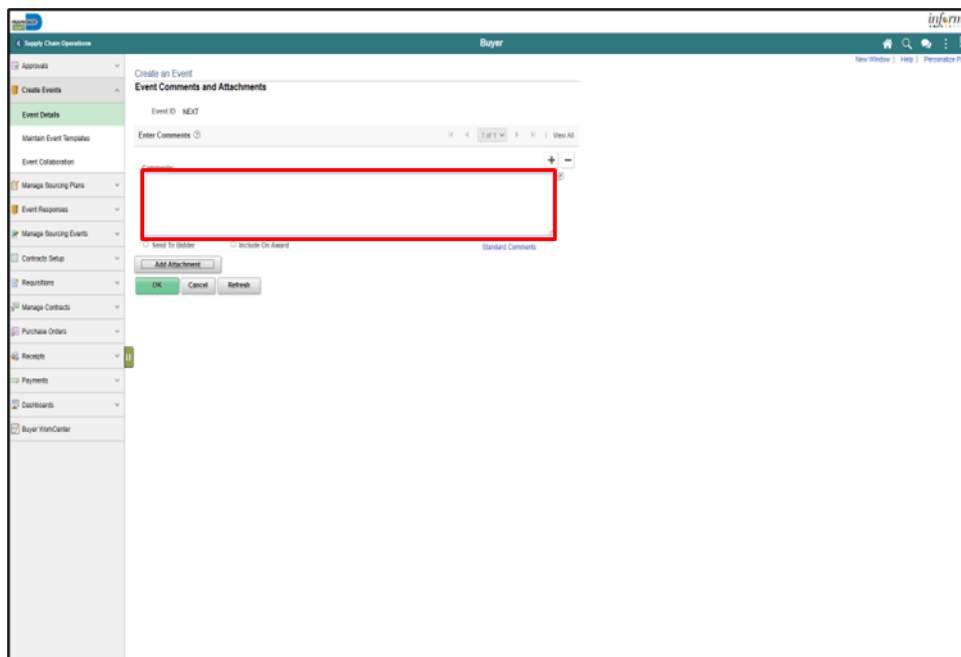
21. Select the **Events Comments and Attachments** link.



22. Enter the desired information into the **Comments** field (this can be used to enter pre-bid/site visit information).

Note: The add button (+) can be utilized to add more than one comment.

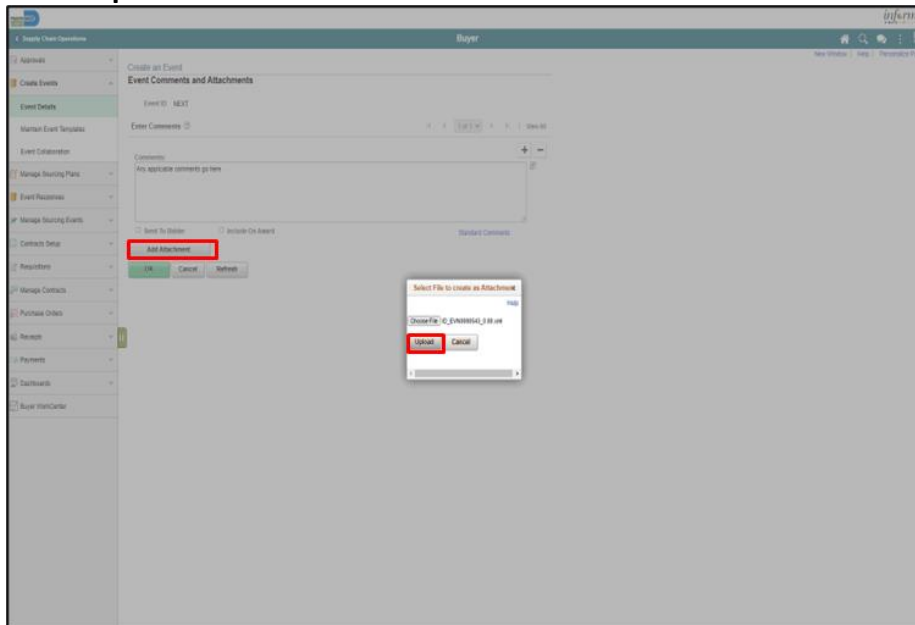
Note: Select the **Send To Bidder** checkbox if the comments are intended for the bidder.



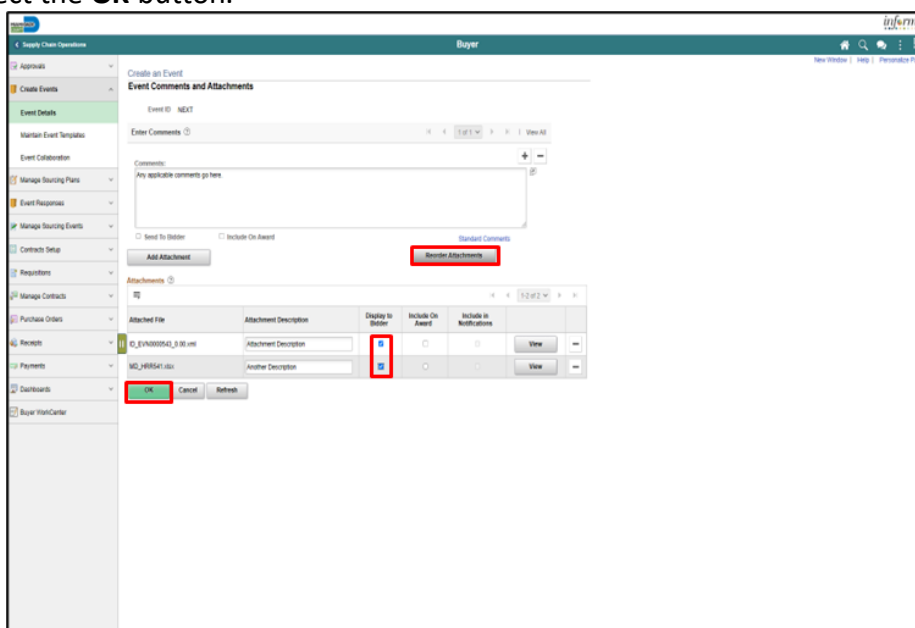
Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

23. Select the **Add Attachment** button.
24. Select the **Choose File** button.
25. Select the desired file. **Note:** The file name has a 64 Character Limit.
26. Select the **Open** button.
27. Select the **Upload** button.



28. 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.
29. Select the **OK** button.



Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

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

The screenshot shows the 'Create Event Details' page in the Buyer portal. The 'Web forms and addendum files' link is highlighted in a red box under the 'Step 1: Define Event Basics' section. The page includes a sidebar with navigation links, a top navigation bar, and a main content area with various event details and steps.

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

32. Select the **OK** button.

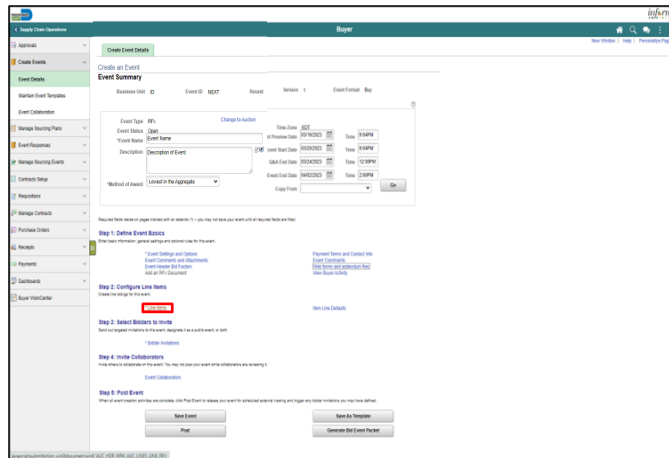
The screenshot shows the 'Webforms and Addendum Files' dialog box. The 'Required for a Bid Event' checkbox is checked for the 'Bid Submittal Form'. The dialog box includes a table of forms and checkboxes, and an 'OK' button is highlighted in a red box.

Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

Step 2: Configure Line Items

33. Select the **Line Items** link.



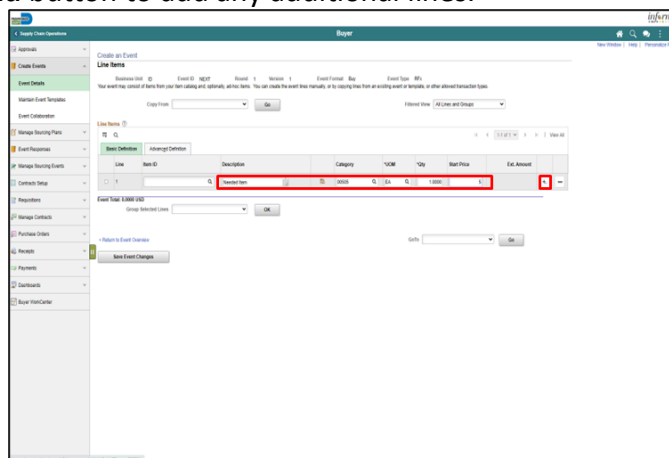
Note: The **Copy From** feature is available here to append or override line details. This copy feature allows the Buyer to copy from a delimited file, purchase order, requisition, sourcing event, or a sourcing template.

34. Input the required **Basic Definition** details.

- **Description**
- **Category**
- **UOM**
- **Qty**
- **Start Price** (system required but defaulted to not be shown to the bidders).

Note: It may be used as a tool to evaluate the estimated contract value when current pricing is used.

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



Note: Select the **Advanced Definition** tab then the **Details** link to designate if a line requires a bid. Additional bid factors may be included here and designated per line. For example, include an “attachment” bid factor for bidders to specifically attach documents related to this item. Another example can be for the Bidders to state the alternate brand being provided via “text” type of bid factor. Bid factors selected here pertain to each line and not to all of the lines of a Buy event. Select the **Save Event Changes** button.

Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

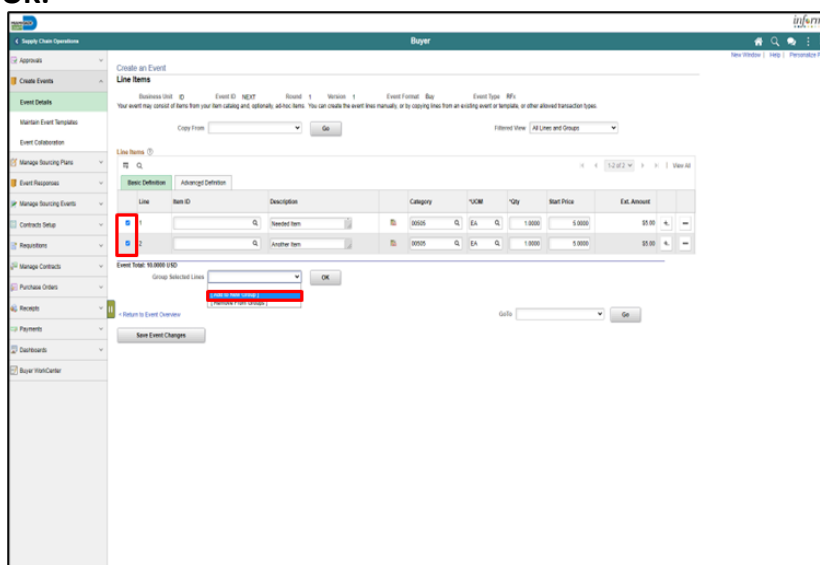
Grouping Lines [optional]

- 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.

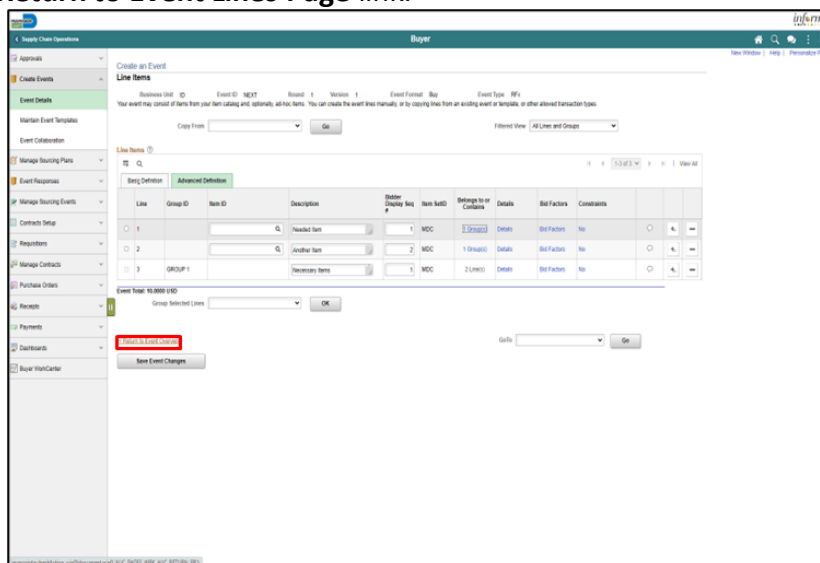
It is recommended that all lines within a group be designated to a group. If any lines are grouped, then all lines must be grouped. Group all lines and designate the appropriate Group ID which will be carried over when bids are evaluated and a contract is awarded.

- Select **OK**.



- Enter **UOM** for Grouped line.

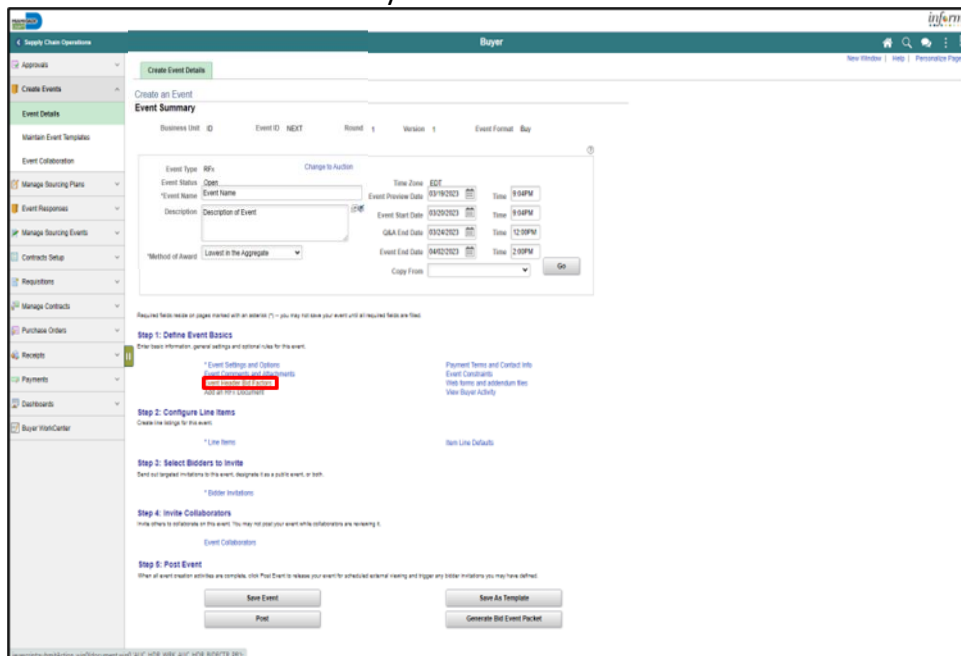
Select the **Return to Event Lines Page** link.



Module 3: Creating a Buy Event

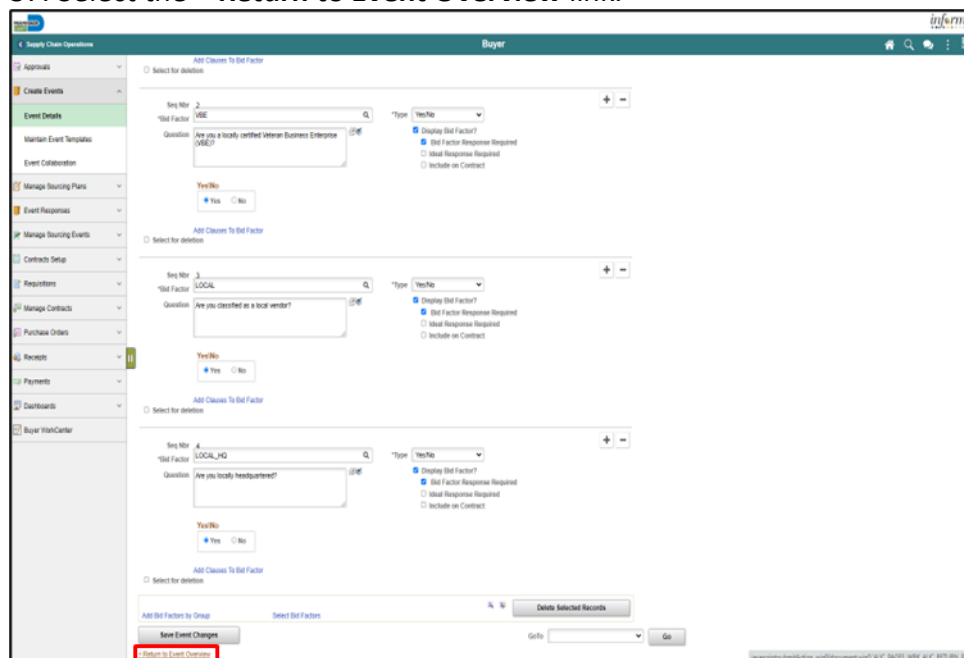
Lesson 1: Creating a Buy Event

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



Note: The add button (+) can be utilized to add additional **Bid Factors**. Additional bid factors may be included here to apply for all items included in the event. For example, a bid factor asking a “yes or no” question or requiring an attachment for the bidders to provide additional information.

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



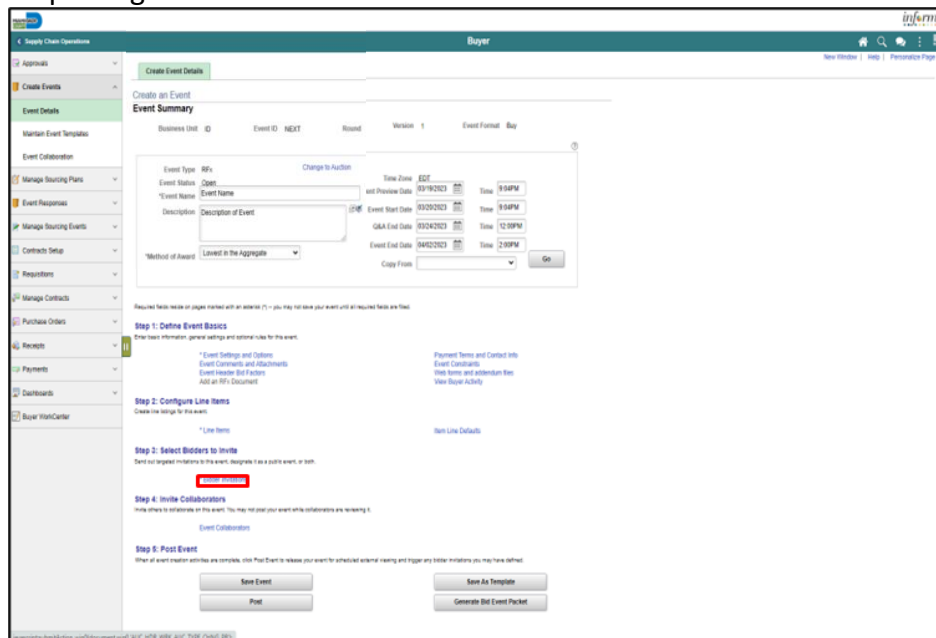
Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

Step 3: Select Bidders to Invite

38. Select the **Bidder Invitations** link.

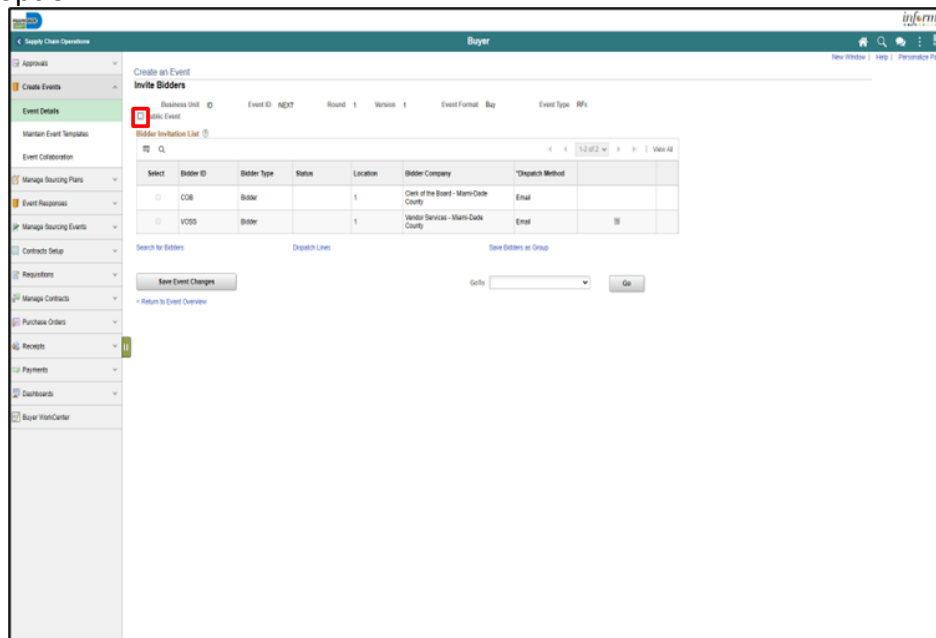
Note: Clerk of the Board and Vendor Services are defaulted to receive notifications of the event posting.



39. 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.

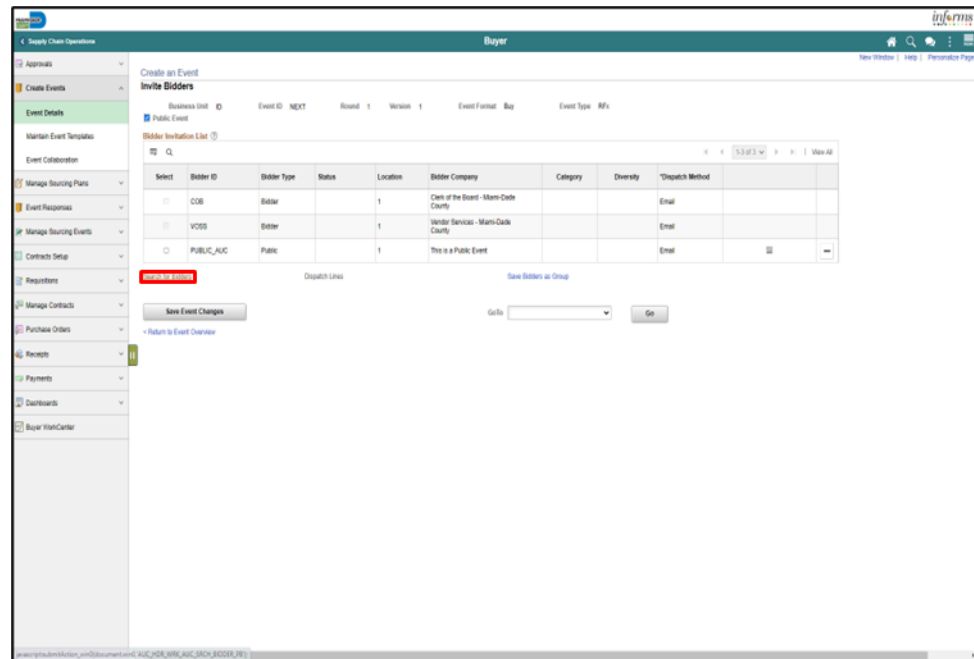
Note: If sourcing from a Bidder Group/Prequalified Pool, **do not** select the Public Event option.



Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

40. Select the **Search for Bidders** link.

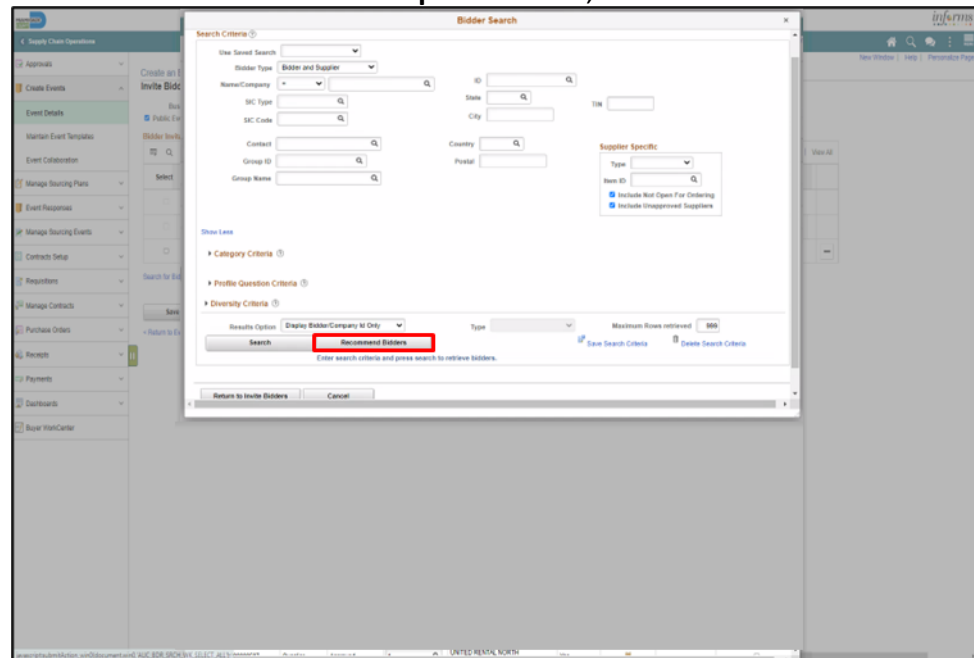


The screenshot shows the 'Buyer' page in the Informs system. The left sidebar contains a navigation menu with various options. The 'Search for Bidders' link is highlighted in red. The main area displays the 'Create an Event' page, which includes a table of bidders.

Select	Bidder ID	Bidder Type	Status	Location	Bidder Company	Category	Diversity	Dispatch Method
<input type="checkbox"/>	COS	Bidder		1	Clark of the Board - Miami-Cade Courts			Email
<input type="checkbox"/>	VOS	Bidder		1	Vendor Services - Miami-Cade Courts			Email
<input type="checkbox"/>	PUBLIC_RUC	Public		1	This is a Public Event			Email

41. 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.



The screenshot shows the 'Bidder Search' dialog box in the Informs system. The 'Recommend Bidders' button is highlighted in red. The dialog box contains various search criteria fields.

Search Criteria:

- Bidder Type: Bidder and Supplier
- Name/Company: [Search]
- SIC Type: [Search]
- SIC Code: [Search]
- Contract: [Search]
- Group ID: [Search]
- Group Name: [Search]
- ID: [Search]
- State: [Search]
- City: [Search]
- Country: [Search]
- Postal: [Search]
- Supplier Specific:
 - Type: [Search]
 - Item ID: [Search]
 - ☒ Include Not Open For Bidding
 - ☒ Include Unapproved Suppliers

Category Criteria:

- Results Option: ☒ Show Bidder Company M Only
- Type: [Search]
- Maximum Rows retrieved: 100

Diversity Criteria:

- ☒ Save Search Criteria
- ☒ Delete Search Criteria

Buttons: Search, Recommend Bidders, Return to Invite Bidders, Cancel

Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

42. Select the **Select All** link.

Bidder Search

Search Criteria

Use Saved Search:

Bidder Type:

Name/Company:

SC Type:

SC Code:

ID:

State:

City:

ZIP:

Category Criteria:

Profile Question Criteria:

Diversity Criteria:

Results Options: Display Bidder/Company ID Only

Search: Recommend Bidders:

Return to Invite Bidders: Cancel:

Search Results

Bidder ID	Bidder Type	Status	Location	Bidder Company	Open for Ordering	Category	Diversity	Invite
1. 000000001	Supplier	Unapproved	1	RAUL J GARCIA	No			<input type="button"/>
2. 000000003	Supplier	Unapproved	1	STEVEN DOUGLAS JOHNSON	No			<input type="button"/>
3. 000000006	Supplier	Unapproved	1	MARISA TINKLER MENDEZ	No			<input type="button"/>
4. 000000008	Supplier	Unapproved	1	ENAJANE	No			<input type="button"/>
5. 000000172	Supplier	Approved	1	GLOBAL ELECTRICAL & LIGHTING SUPPLIES	Yes			<input type="button"/>
6. 000000307	Supplier	Approved	1	LAB RESEARCH LABORATORY SUPPLY CORP	Yes			<input type="button"/>
7. 000000553	Supplier	Approved	1	HLTI INC	No			<input type="button"/>
8. 000000561	Supplier	Approved	1	COMMUNICATIONS SUPPLY CORPORATION	No			<input type="button"/>
9. 000000561	Supplier	Approved	1	UNITED RENTALS NORTH	No			<input type="button"/>

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

Bidder Search

Search Criteria

Use Saved Search:

Bidder Type:

Name/Company:

SC Type:

SC Code:

ID:

State:

City:

ZIP:

Category Criteria:

Profile Question Criteria:

Diversity Criteria:

Results Options: Display Bidder/Company ID Only

Search: Recommend Bidders:

Return to Invite Bidders: Cancel:

Search Results

Bidder ID	Bidder Type	Status	Location	Bidder Company	Open for Ordering	Category	Diversity	Invite
1. 000000001	Supplier	Unapproved	1	RAUL J GARCIA	No			<input type="button"/>
2. 000000003	Supplier	Unapproved	1	STEVEN DOUGLAS JOHNSON	No			<input type="button"/>
3. 000000006	Supplier	Unapproved	1	MARISA TINKLER MENDEZ	No			<input type="button"/>
4. 000000008	Supplier	Unapproved	1	ENAJANE	No			<input type="button"/>
5. 000000172	Supplier	Approved	1	GLOBAL ELECTRICAL & LIGHTING SUPPLIES	Yes			<input type="button"/>
6. 000000307	Supplier	Approved	1	LAB RESEARCH LABORATORY SUPPLY CORP	Yes			<input type="button"/>
7. 000000553	Supplier	Approved	1	HLTI INC	No			<input type="button"/>
8. 000000561	Supplier	Approved	1	COMMUNICATIONS SUPPLY CORPORATION	No			<input type="button"/>
9. 000000561	Supplier	Approved	1	UNITED RENTALS NORTH	No			<input type="button"/>

Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

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

The screenshot shows the 'Buyer' interface with the 'Create an Event' page. The 'Event Details' tab is active, displaying a table of bidders. The 'Save Event Changes' button is highlighted with a red box.

Select	Bidder ID	Bidder Type	Status	Location	Bidder Company	Category	Diversity	Dispatch Method
<input type="checkbox"/>	C08	Bidder		1	Clerk of the Board - Miami-Dade Courts			Email
<input type="checkbox"/>	VC09	Bidder		1	Vendor Services - Miami-Dade Courts			Email
<input type="checkbox"/>	PUBLIC_AUC	Public		1	This is a Public Event			Email
<input type="checkbox"/>	000000001	Supplier	Unapproved	1	RAUL J GARCIA			Email
<input type="checkbox"/>	000000002	Supplier	Unapproved	1	STEVEN DOUGLAS JOHNSON			Email
<input type="checkbox"/>	000000006	Supplier	Unapproved	1	MARIA TAVLER MENDEZ			Email
<input type="checkbox"/>	000000008	Supplier	Unapproved	1	ENA JANE			Email
<input type="checkbox"/>	000000172	Supplier	Approved	1	GLOBAL ELECTRICALS LIGHTING SUPPLIES			Email
<input type="checkbox"/>	000000367	Supplier	Approved	1	LAB RESEARCH LABORATORY SUPPLY CORP			Email
<input type="checkbox"/>	000000563	Supplier	Approved	1	HETI-INC			Email
<input type="checkbox"/>	000000561	Supplier	Approved	1	COMMUNICATIONS SUPPLY CORPORATION			Email
<input type="checkbox"/>	000000567	Supplier	Approved	1	UNITED RENOVIL NORTH AMERICA INC.			Email
<input type="checkbox"/>	000000505	Supplier	Approved	1	ALL AMERICAN PRESSURE CLEANING &			Email
<input type="checkbox"/>	000000014	Supplier	Approved	1	LUNAR INDUSTRIAL & ELECTRONIC INC.			Email
<input type="checkbox"/>	000000722	Supplier	Approved	1	BEZONA INC			Email

45. Select the **Save Event** button.

The screenshot shows the 'Buyer' interface with the 'Create an Event' page. The 'Event Summary' tab is active, displaying event details. The 'Save Event' button is highlighted with a red box.

Event Summary

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

Event Type: RFPs Change to Auction

Event Status: Draft Event Name: Time Zone: EST

Event Name: Description of Event: Event Start Date: 03/02/2023 Time: 9:00PM

Event End Date: 03/02/2023 Time: 9:00PM

Method of Award: Lowest in the Aggregate

Copy From:

Required fields include 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 Conditions and Attachments
- * Event Header Bid Factors
- * Add an RFPs Document

Step 2: Configure Line Items

Create line items for this event.

- * Line Items
- * Item Line Defaults

Step 3: Select Bidders to Invite

Select our targeted bidders to this event. Assignments to a public event, or both.

- * Bidder Invitations

Step 4: Invite Collaborations

Invite others to collaborate on this event. You may not post your event while collaborations are pending.

- * Event Collaborations

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.

Save Event (highlighted with a red box)

Post

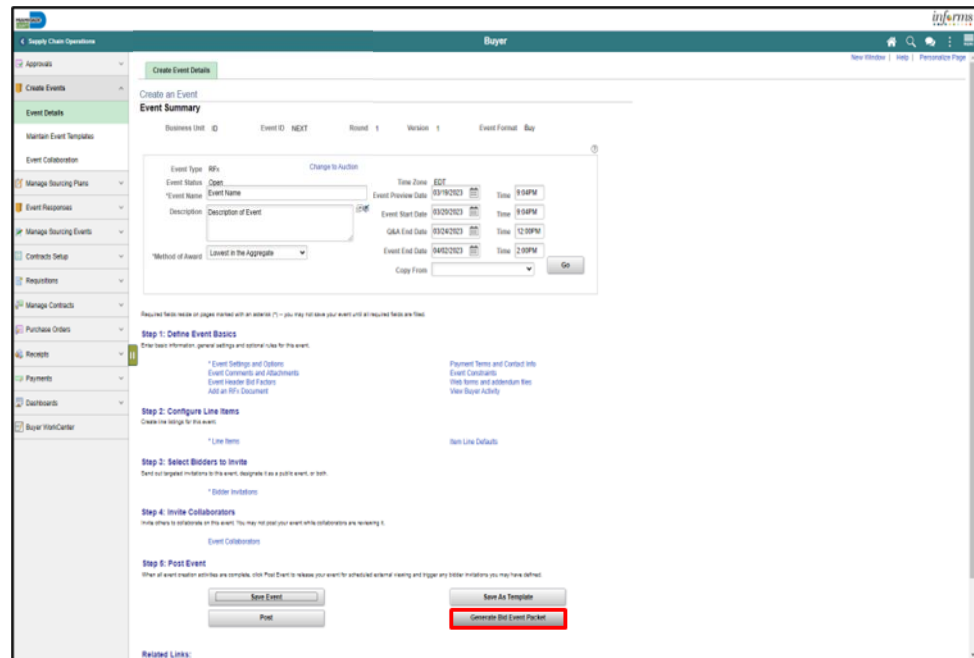
Save As Template

Generate Bid Event Packet

Module 3: Creating a Buy Event

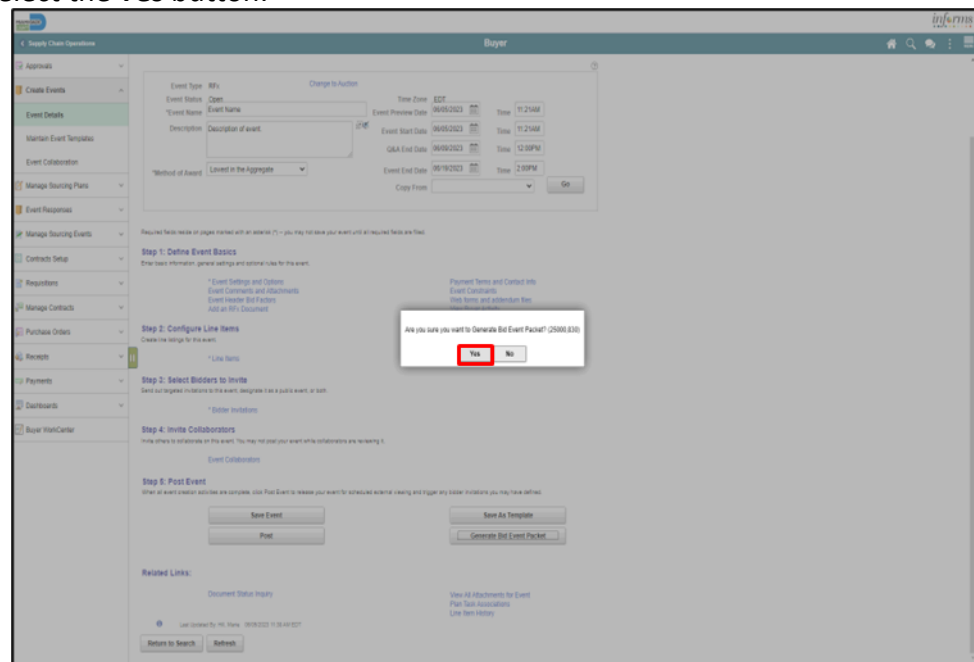
Lesson 1: Creating a Buy Event

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



The screenshot shows the 'Create Event Details' page in the Buyer portal. The 'Event Summary' section is visible, showing fields for Event Type, Event Name, Event Status, Description, Event Start Date, Event End Date, and Event Format. The 'Generate Bid Event Packet' button is highlighted with a red box.

47. Select the **Yes** button.

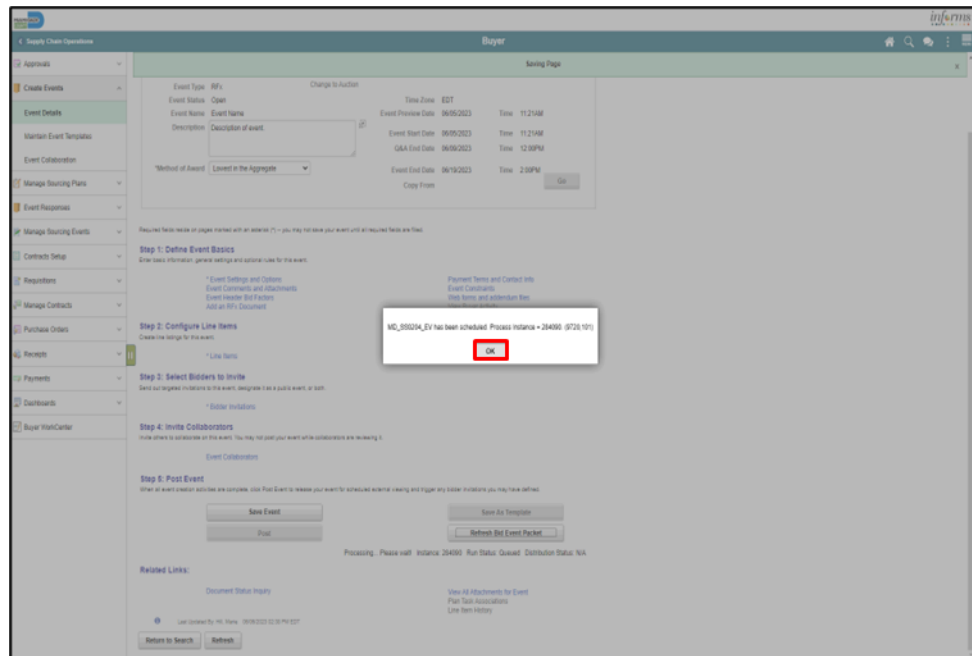


The screenshot shows the 'Create Event Details' page in the Buyer portal. A confirmation dialog box is displayed, asking 'Are you sure you want to Generate Bid Event Packet? (25000.00)'. The 'Yes' button is highlighted with a red box.

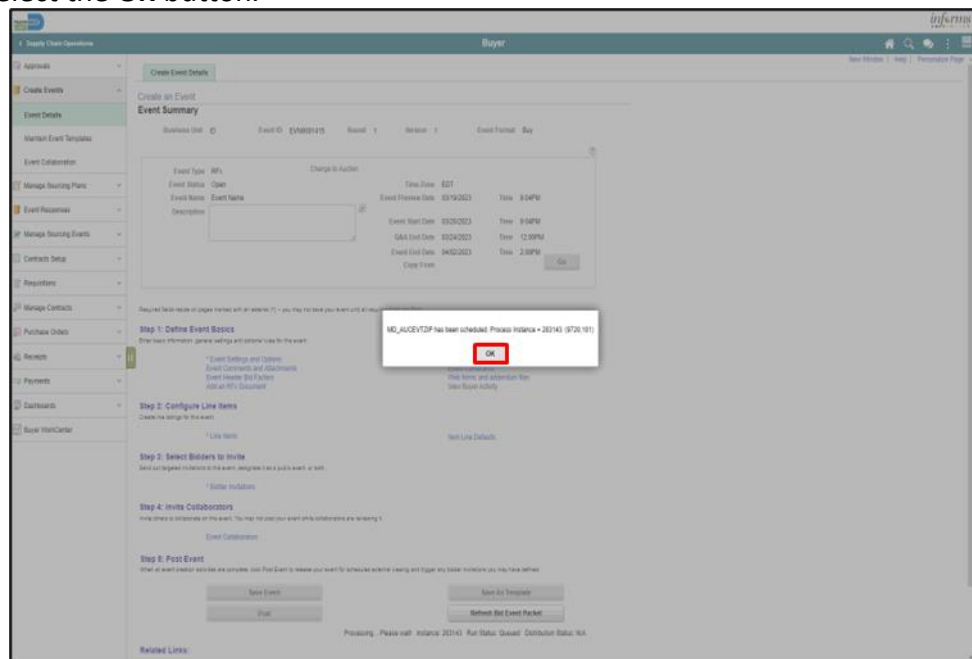
Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

48. Select the **OK** button.



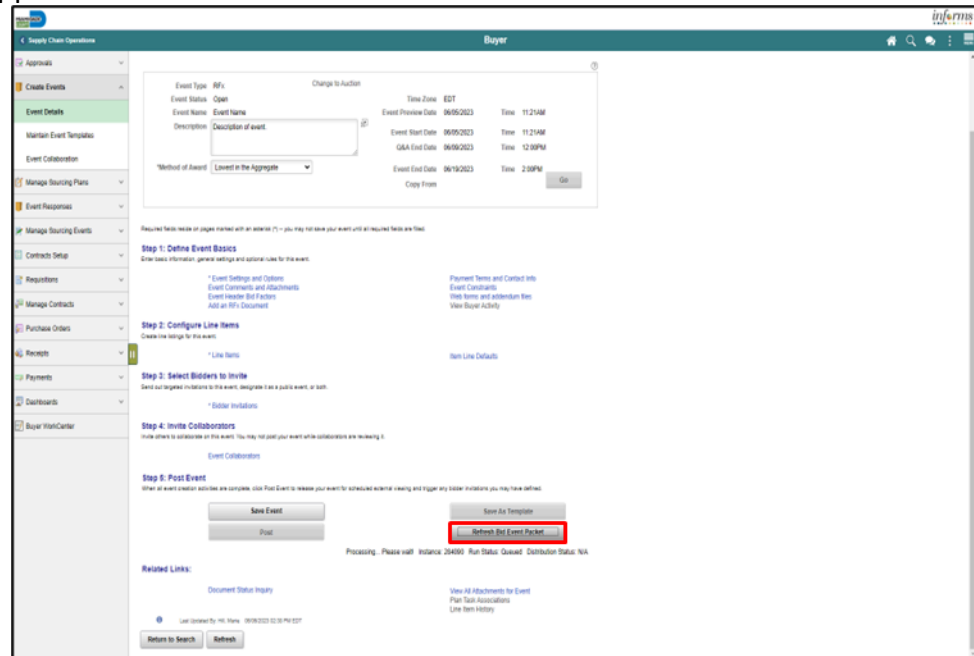
49. Select the **OK** button.



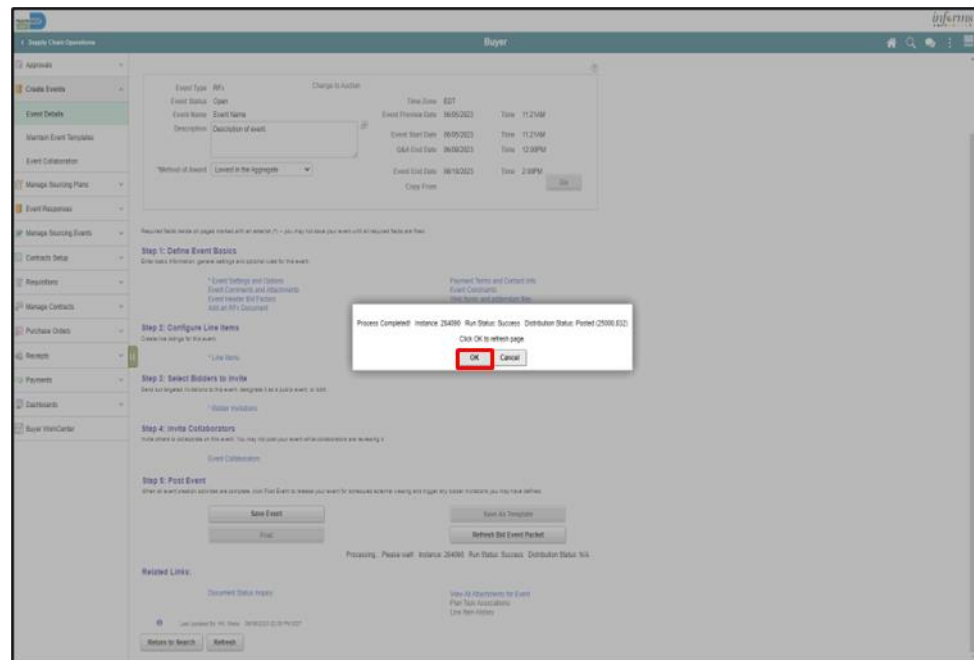
Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

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



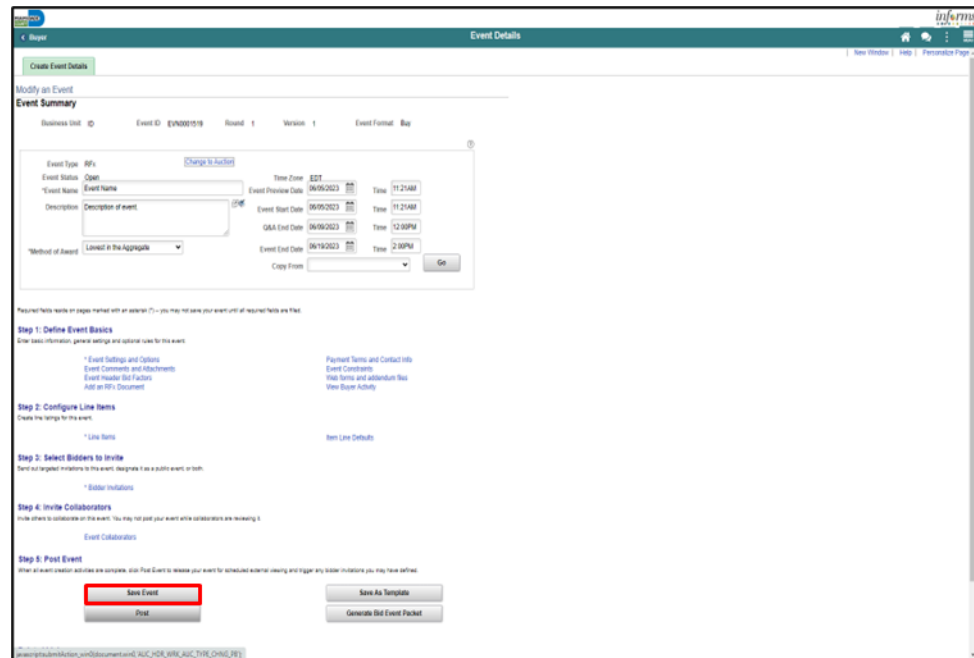
51. Select the **OK** button.



Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

52. Select the **Save Event** button.



Event Details

Create Event Details

Modify an Event

Event Summary

Business Unit: ID Event ID: EPN0001019 Round: 1 Version: 1 Event Format: Buy

Event Type: RFx [Change to Auction](#)

Event Status: Open

Event Name:

Description:

Method of Award:

Time Zone: EST

Event Preview Date: 06/05/2023 Time: 11:21AM

Event Start Date: 06/05/2023 Time: 11:21AM

QA End Date: 06/05/2023 Time: 12:00PM

Event End Date: 06/10/2023 Time: 2:00PM

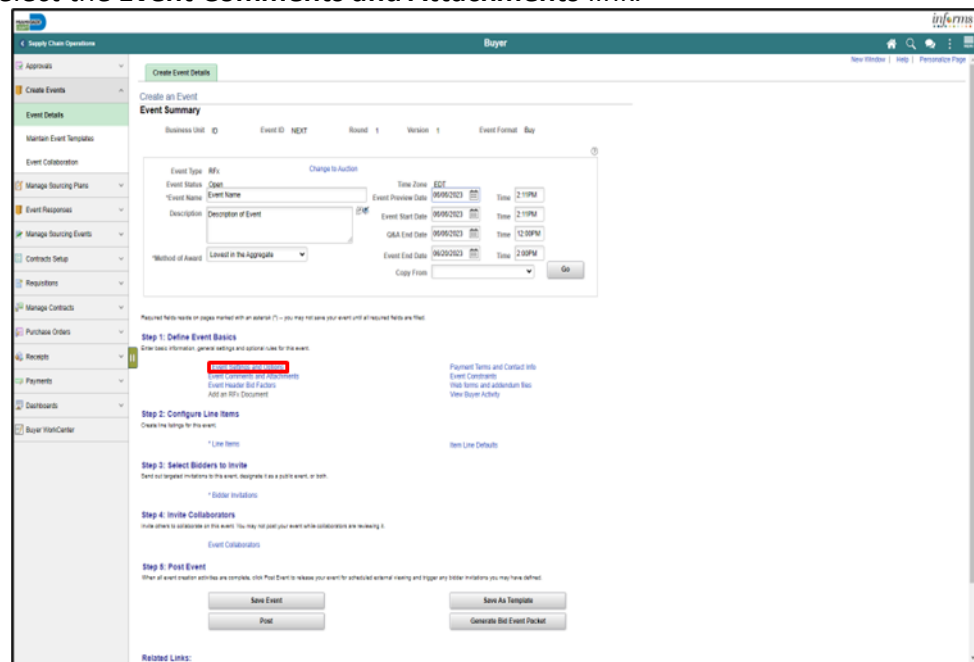
Copy From:

Save Event

Save As Template

Generate Bid Event Packet

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



Event Details

Create Event Details

Modify an Event

Event Summary

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

Event Type: RFx [Change to Auction](#)

Event Status: Open

Event Name:

Description:

Method of Award:

Time Zone: EST

Event Preview Date: 06/05/2023 Time: 2:10PM

Event Start Date: 06/05/2023 Time: 2:10PM

QA End Date: 06/05/2023 Time: 12:00PM

Event End Date: 06/05/2023 Time: 2:00PM

Copy From:

Event Comments and Attachments

Save Event

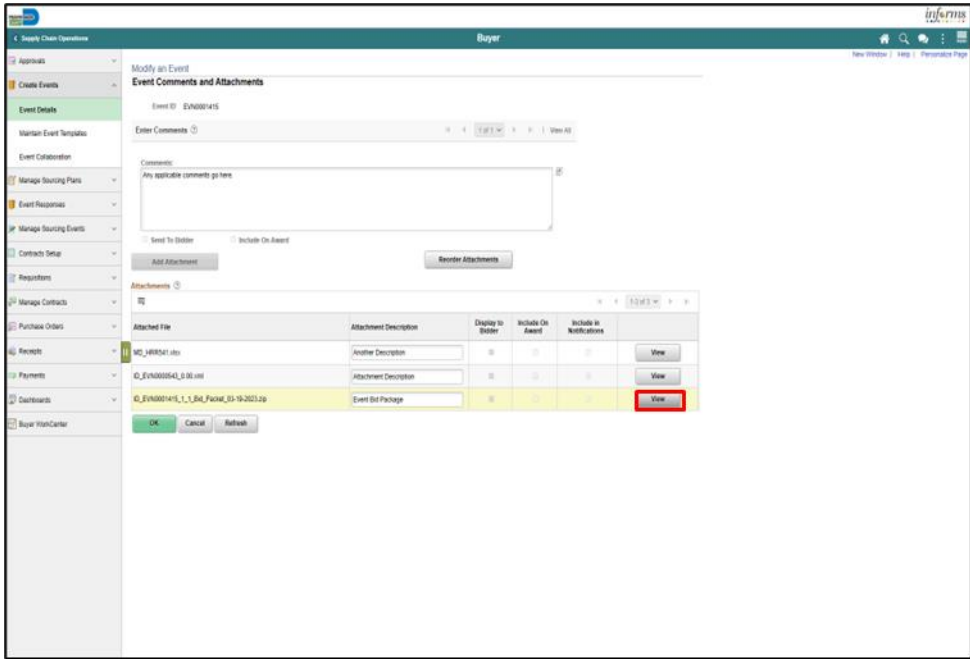
Save As Template

Generate Bid Event Packet

Module 3: Creating a Buy Event

Lesson 1:
Creating a Buy
Event

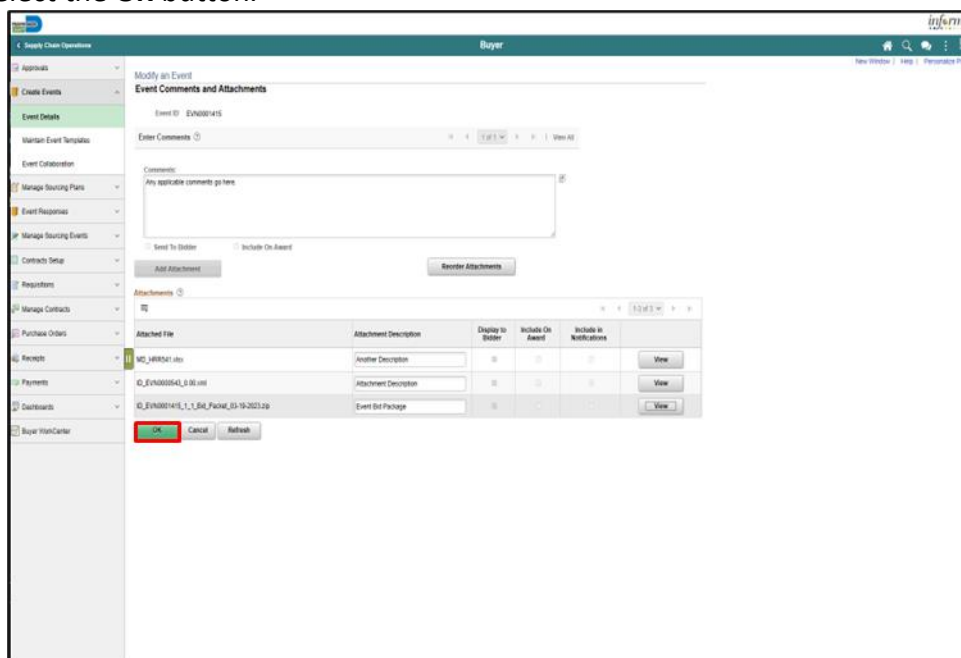
View the **Event Bid Package** to ensure all documents were loaded into the .pdf file.
54. Select the **View** button.



Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

55. Select the **OK** button.



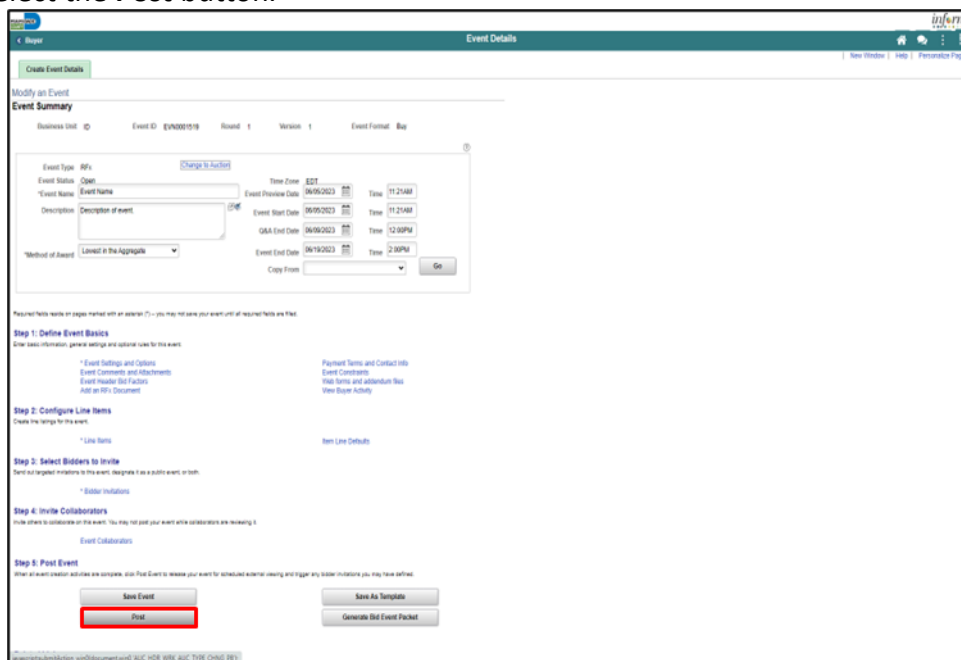
The screenshot shows the 'Buyer' interface with the 'Event Comments and Attachments' section. The 'Attachments' table lists the following data:

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
ID_EV000004L_06.pdf	Attachment Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
ID_EV000004L_1_1_04_Packal_03-10-2023.zip	Event Bid Package	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View

The 'OK' button is highlighted with a red box.

Note: The event bid packet gets automatically saved to the event attachments.

56. Select the **Post** button.



The screenshot shows the 'Event Details' interface with the 'Event Summary' section. The 'Post' button is highlighted with a red box.

The 'Event Summary' section displays the following information:

- Business Unit: ID
- Event ID: EV0000010
- Round: 1
- Version: 1
- Event Format: Buy

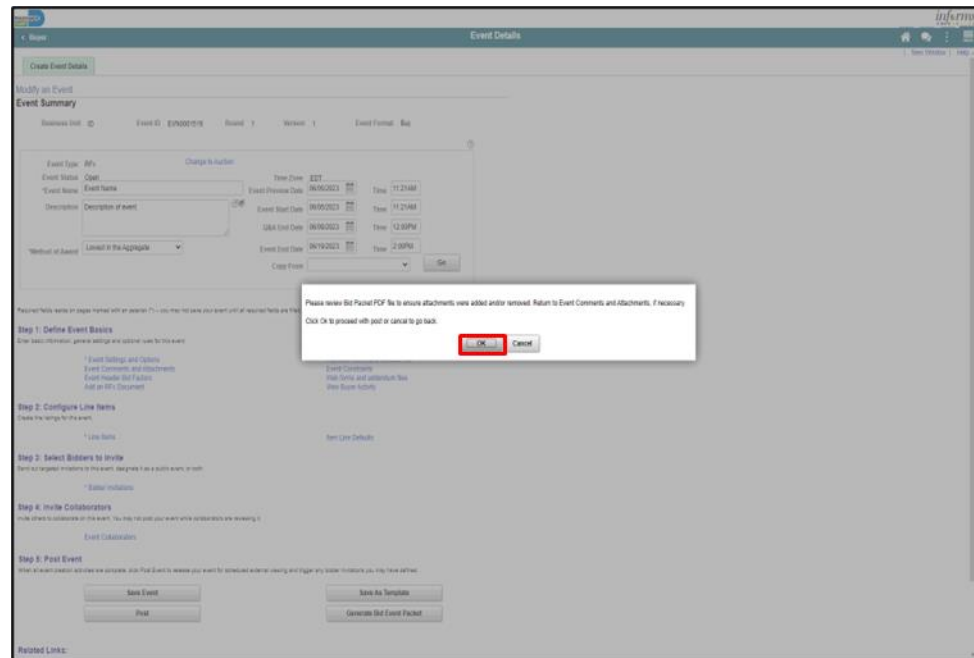
The 'Event Type' is 'RFx'. The 'Event Status' is 'Open'. The 'Event Name' is 'Description of event'. The 'Method of Award' is 'Lowest in the Aggregates'. The 'Event Start Date' is '06/06/2023' and the 'Event End Date' is '06/19/2023'. The 'Time Zone' is 'EST'. The 'Event Preview Date' is '06/06/2023' and the 'Event Start Date' is '06/06/2023'. The 'GAA End Date' is '06/06/2023' and the 'Event End Date' is '06/19/2023'. The 'Copy From' field is empty.

The 'Post' button is highlighted with a red box.

Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event

57. Select the **OK** button.



Event Details

Create Event Details

Modify an Event

Event Summary

Business Unit: ID: Event ID: EV00001518 Round: 1 Version: 1 Event Format: Buy

Event Type: RFx Change to Auction

Event Status: Open

Event Name: [Field]

Description: [Field]

Method of Award: Lowest in the Aggregate

Time Zone: EST

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

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

QAA End Date: 06/06/2023 Time: 12:00PM

Event End Date: 06/16/2023 Time: 2:00PM

Create From: [Field]

Go

Please review the 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.

OK Cancel

Step 1: Define Event Basics

Enter basic information, general settings and optional user for this event.

Event Settings and Options

Event Comments and Attachments

Event Header Bid Factors

Add an RFx Document

Step 2: Configure Line Items

Create the items for this event.

Line Items

Item Line Details

Step 3: Select Bidders to Invite

Select all targeted invitees to this event. Assign roles to a subset of invitees, or none.

Bidder Invitations

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are working on it.

Event Collaborators

Step 5: Post Event

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

Save Event

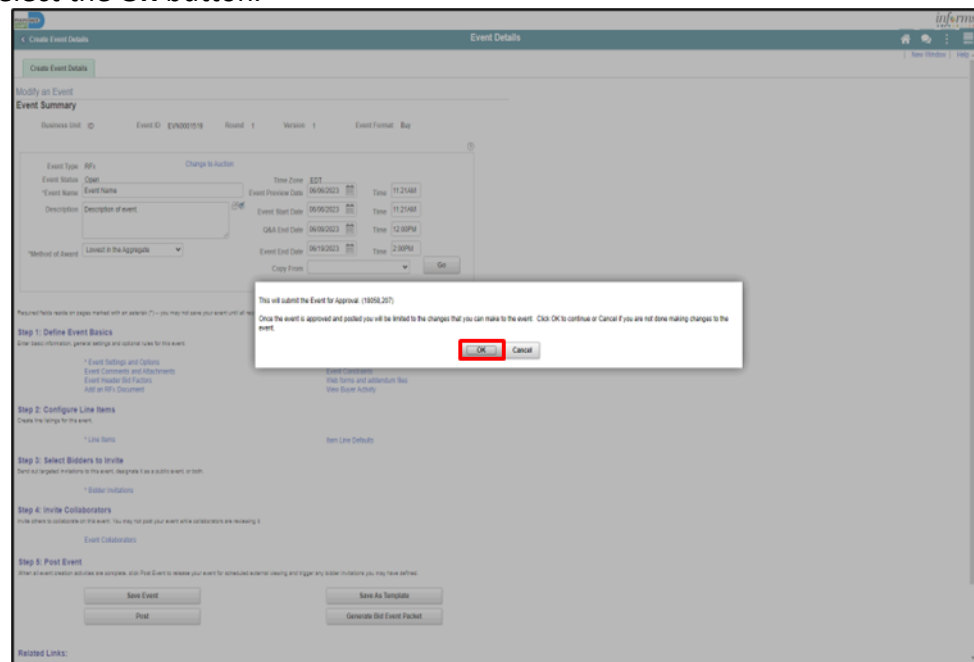
Post

Save As Template

Generate Bid Event Packet

Related Links:

58. Select the **OK** button.



Event Details

Create Event Details

Modify an Event

Event Summary

Business Unit: ID: Event ID: EV00001518 Round: 1 Version: 1 Event Format: Buy

Event Type: RFx Change to Auction

Event Status: Open

Event Name: [Field]

Description: [Field]

Method of Award: Lowest in the Aggregate

Time Zone: EST

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

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

QAA End Date: 06/06/2023 Time: 12:00PM

Event End Date: 06/16/2023 Time: 2:00PM

Create From: [Field]

Go

This will submit the Event for Approval (1055.207)

Once 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 user for this event.

Event Settings and Options

Event Comments and Attachments

Event Header Bid Factors

Add an RFx Document

Step 2: Configure Line Items

Create the items for this event.

Line Items

Item Line Details

Step 3: Select Bidders to Invite

Select all targeted invitees to this event. Assign roles to a subset of invitees, or none.

Bidder Invitations

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are working on it.

Event Collaborators

Step 5: Post Event

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

Save Event

Post

Save As Template

Generate Bid Event Packet

Related Links:

Module 3: Creating a Buy Event

Lesson 2: Import an RFx Document

As in use today, any solicitation document being advertised requires attachment in the **Event Comments and Attachments** section along with any supporting documents, and the creation of the solicitation packet to be distributed to the bidding community. Utilizing the **Add an RFx Document** link, a Buyer can import an approved solicitation document. Importing the approved solicitation document as the RFx document does not advertise it to the bidders, only uploading the approved document in the **Event Comments and Attachments** section and inclusion in the Bid Event Package allows bidders to access to the document(s).

There is collaboration within this link. This is a tool available for internal usage to collaborate in the creation, edit, and finalize documents such as the Invitation to Quote and will not be communicated to the external community. It is highly recommended that as a Buyer, the focus remains on importing an already approved document.

Navigate to: **Finance/Supply Chain (FSCM) > Finance & Accounting > Supply Chain Operations > Buyer**

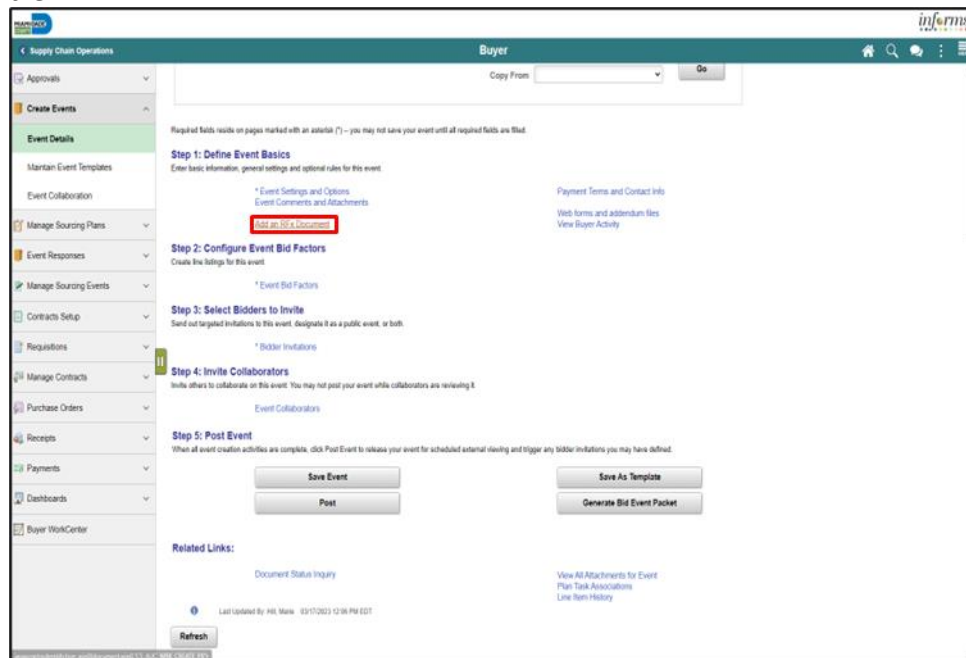
When returning to an event:

1. Select the **Find an Existing Value Tab**.
2. Input any applicable search parameters.
3. Select the **Search** button.

If currently working on an event:

1. Select the **Add an RFx Document** link.

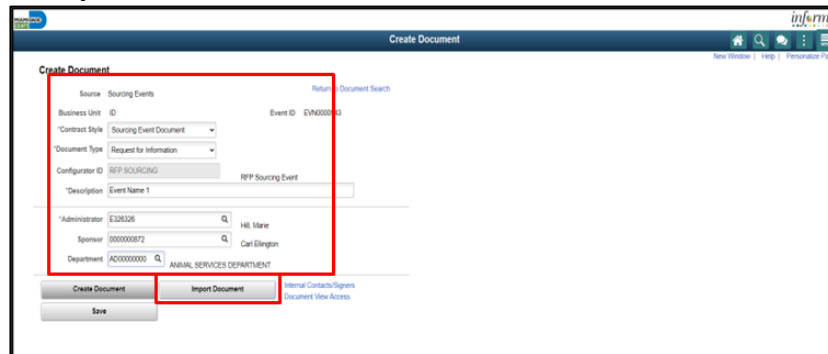
Note: The event must be saved and have an event ID before this link becomes available.



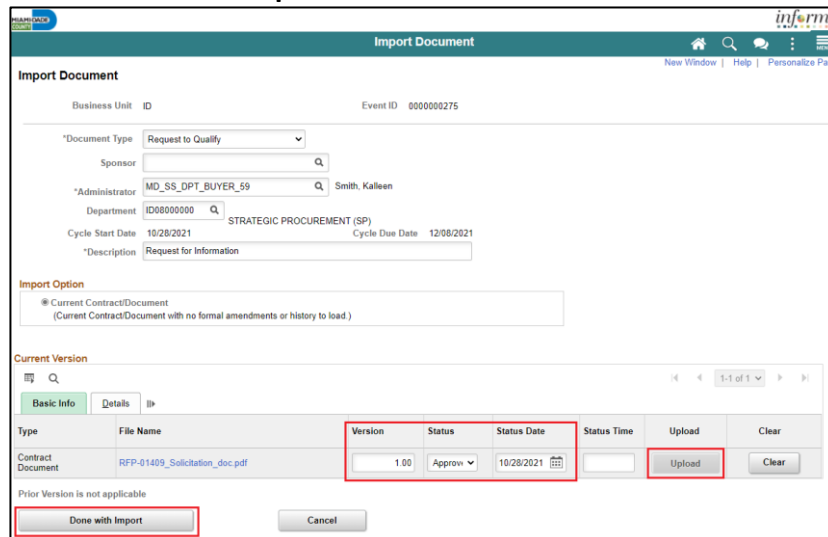
Module 3: Creating a Buy Event

Lesson 2: Import an RFx Document

2. Input or search for the required fields.
 - **Contract Style**
 - **Document Type**
 - **Description**
3. Select the **Import Document** button.



4. Enter the details in the **Basic Info** tab.
 - Select the applicable option from the **Document Type** list.
 - Enter 1.0 in the **Version** field.
 - Select the applicable option from the **Status** list. If it is to go through the approval process, then the document would have to be brought in in “Draft” status. Since current state is to import an already approved document, select **Approved** as the document status.
 - Enter 'current date' in the **Status Date**.
 - Select the **Upload** button.
 - Select the **Choose File** button.
 - Select the desired file. **Note:** The file name has a 64 Character Limit.
 - Select the **Open** button.
 - Select the **Upload** button.
 - Select the **Done with Import** button.

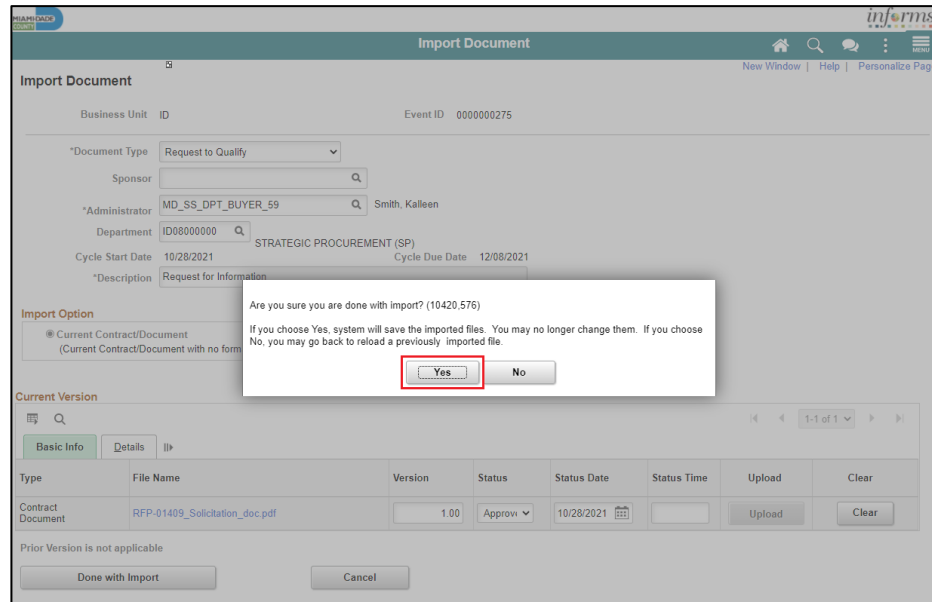


Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document	RFP-01409_Solicitation_doc.pdf	1.00	Approv	10/28/2021		Upload	Clear

Module 3: Creating a Buy Event

Lesson 2: Import an RFx Document

5. Select the **Yes** button.



Import Document

Business Unit ID: _____ Event ID: 0000000275

*Document Type: Request to Qualify

Sponsor: _____

*Administrator: MD_SS_DPT_BUYER_59 | Smith, Kalleen

Department: ID08000000 | STRATEGIC PROCUREMENT (SP)

Cycle Start Date: 10/28/2021 | Cycle Due Date: 12/08/2021

*Description: Request for Information

Import Option

☒ Current Contract/Document
☐ (Current Contract/Document with no form)

Are you sure you are done with import? (10420.576)
 If you choose Yes, system will save the imported files. You may no longer change them. If you choose No, you may go back to reload a previously imported file.

Yes **No**

Current Version

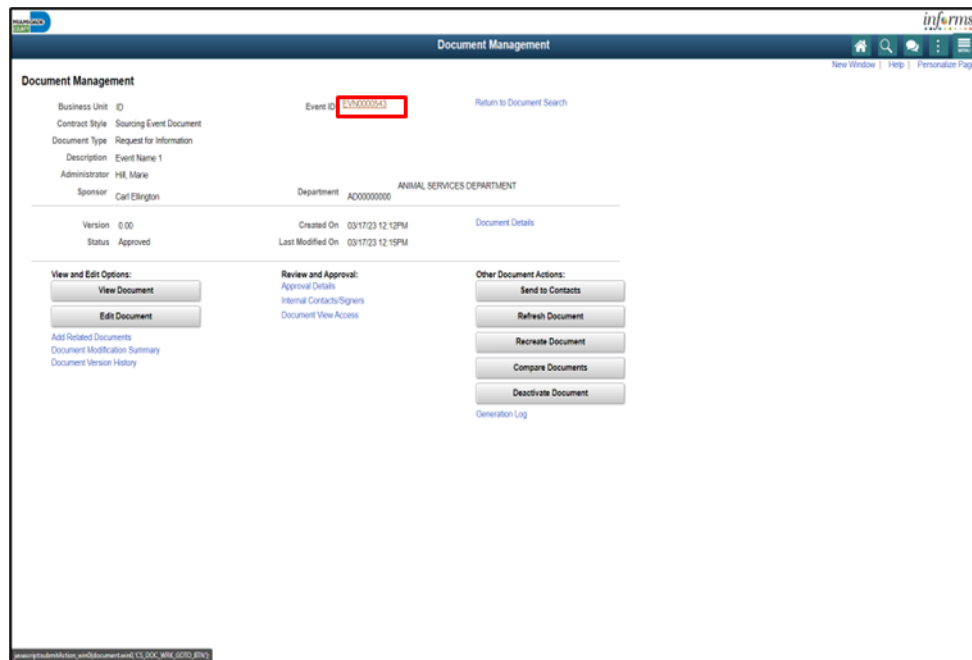
Basic Info | Details | >

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document	RFP-01409_Solicitation_doc.pdf	1.00	Approve	10/28/2021		Upload	Clear

Prior Version is not applicable

Done with Import **Cancel**

6. Select the **Event ID** link.



Document Management

Business Unit ID: _____ Event ID: **0000000275** [Return to Document Search](#)

Contract Style: Sourcing Event Document

Document Type: Request for Information

Description: Event Name 1

Administrator: Hill, Marie

Sponsor: Carl Ellington

Department: ANIMAL SERVICES DEPARTMENT

Version: 0.00

Status: Approved

Created On: 03/17/23 12:12PM

Last Modified On: 03/17/23 12:15PM

[Document Details](#)

View and Edit Options:

[View Document](#)

[Edit Document](#)

[Add Related Documents](#)

[Document Modification Summary](#)

[Document Version History](#)

Review and Approval:

[Approval Details](#)

[Internal Contacts/Signers](#)

[Document View Access](#)

Other Document Actions:

[Send to Contacts](#)

[Refresh Document](#)

[Recreate Document](#)

[Compare Documents](#)

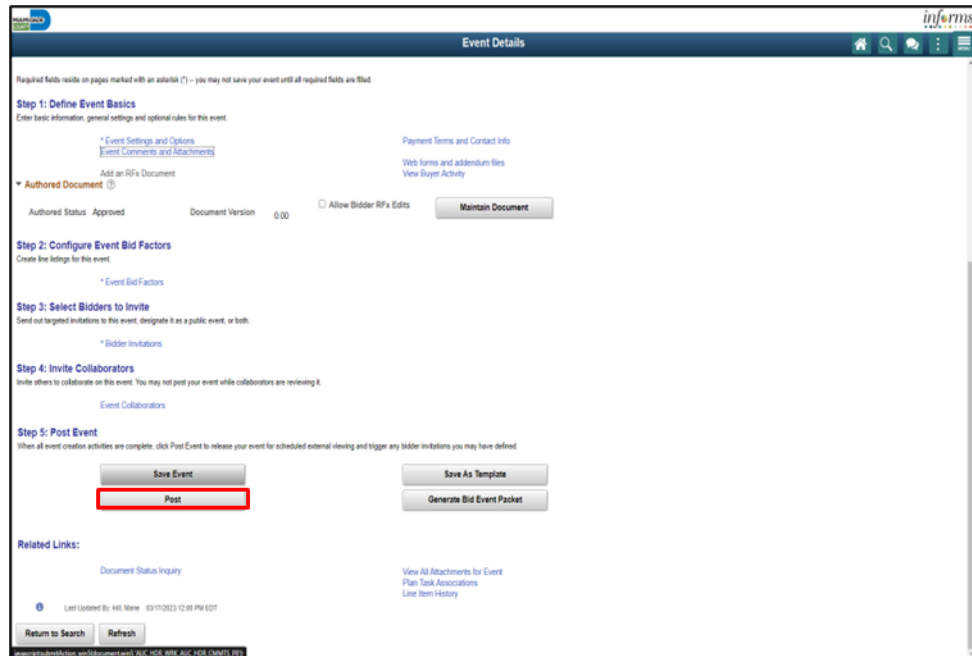
[Deactivate Document](#)

[Generation Log](#)

Module 3: Creating a Buy Event

Lesson 2: Import an RFx Document

7. Select the **Post** button.



The screenshot displays the 'Event Details' page in the informs system. The page is divided into several sections, each representing a step in the event creation process:

- Step 1: Define Event Basics**
 - Enter basic information, general settings and optional rules for this event.
 - Links: [Event Settings and Options](#), [Event Comments and Attachments](#), [Payment Terms and Contact Info](#), [Web forms and addendum files](#), [View Buyer Activity](#).
 - Section: **Authoring Document** (with a help icon)
 - Buttons: [Add an RFx Document](#), [Maintain Document](#).
 - Fields: **Authoring Status** (Approved), **Document Version** (0.00), ☐ **Allow Bidder RFx Edits**.
- Step 2: Configure Event Bid Factors**
 - Create bid settings for this event.
 - Link: [Event Bid Factors](#).
- Step 3: Select Bidders to Invite**
 - Send out targeted invitations to this event, designate it as a public event, or both.
 - Link: [Bidder Invitations](#).
- Step 4: Invite Collaborators**
 - Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.
 - Link: [Event Collaborators](#).
- 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.
 - Buttons: [Save Event](#), [Post](#) (highlighted with a red rectangle), [Save As Template](#), [Generate Bid Event Packet](#).
- Related Links:**
 - [Document Status Inquiry](#), [View All Attachments for Event](#), [Plan Task Associations](#), [Line Item History](#).
- Footer:**
 - Information: Last Updated By: HIL, Name: 03/11/2023 12:06 PM EDT.
 - Buttons: [Return to Search](#), [Refresh](#).
 - URL: [jwainright@informs.com, path=documentand, RFx_HDR_WMR_AUC_HDR_DOCUMENTS, 995](#).

Module 3: Creating a Buy Event

Module 3: Creating a Buy Event Summary

Now that the lesson has been completed, the user should be able to:

- Create a Buy Event
- Import an RFX Document



Module 4: Approve an Event

Lessons

This module includes the following lessons:

- Approve an Event

Module 4: Approve an Event

Module 1: Overview

At the conclusion of this lesson, users will be able to:

- Approve an Event

Module 4: Approve an Event

Lesson 1: Introduction

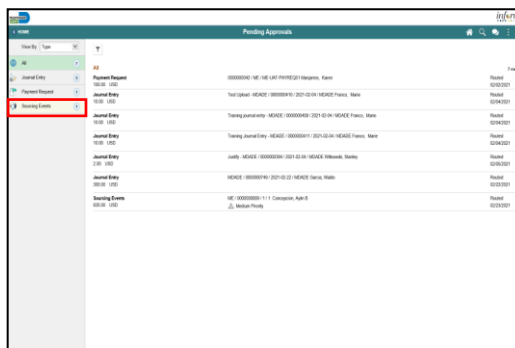
When a Strategic Sourcing Event has been submitted for approval and is in pending approval status, the Strategic Sourcing Event Approver must review the event. If the event is approved, the event will immediately be posted if the preview/start date/time has already passed. If the preview/start date/time is in the future, the event will post at the date/time specified in the event once in approved status. If the Strategic Sourcing Event Approver denies the event, it will return to the Strategic Sourcing Buyer to modify based on the comments from the Strategic Sourcing Event Approver. The event approver **cannot** make edits/modifications to the event when approving, it must be denied back to the event creator to be edited.

Module 4: Approve an Event

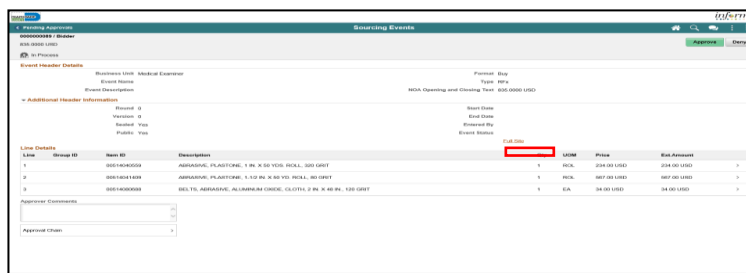
Lesson 1: Approve an Event

Navigate to: **Pending Approvals**

1. Select the **Sourcing Events** link.

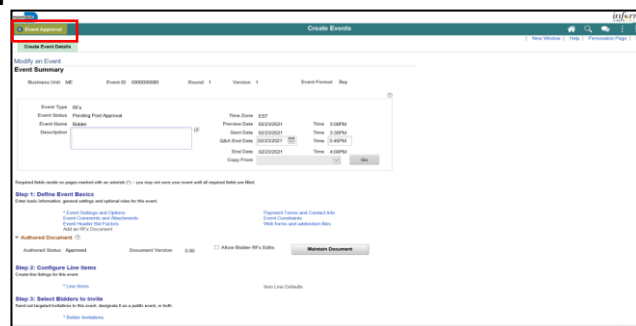


2. Select the Sourcing Event to approve.
3. Select the **Full Site** link.

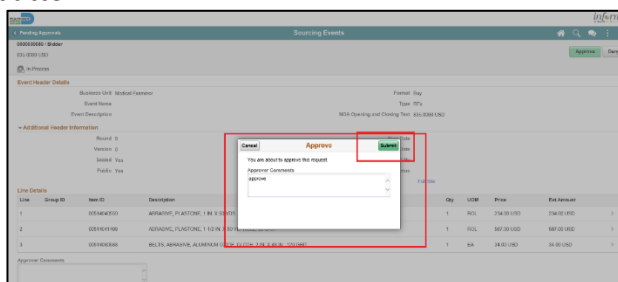


Note: Review Sourcing Event by Selecting on the applicable links on the Event Details page, e.g., Event Comments and Attachments link, Web forms and addendum files link.

4. Select the **Event Approval** button.



5. Select the **Approve** or **Deny** button.
6. Enter the desired information into the **Approver Comments** field.
7. Select the **Submit** button.



Note: If the event is denied, it will route back to the Strategic Sourcing Buyer to modify the event.

Module 4: Approve an Event

Module 4: Approve an Event Summary

Now that the lesson has been completed, the user should be able to:

- Approve an Event



Module 5: Creating Multiple Versions of Sourcing Events

Module 1: Overview

At the conclusion of this lesson, the user will be able to:

- Create multiple versions of sourcing events

Module 5: Creating Multiple Versions of Sourcing Events

Lesson 1: Introduction

When a Strategic Sourcing Event has been posted, the Strategic Sourcing Event Buyer can create multiple versions to make changes within the event. These changes can vary and include the following: updating/adding/deleting lines/details, updating bidder invitations, events date/times, adding addendum files, etc. Once edits are made to the new version, it is posted and goes for approval and once approved, the new version replaces the old version. Notifications are sent to all bidders that have viewed the event to alert them that the edited event is available to the Bidders. A new version can only be created before the event has ended.

Module 5: Creating Multiple Versions of Sourcing Events

Key Terms

The following key terms are used in this lesson:



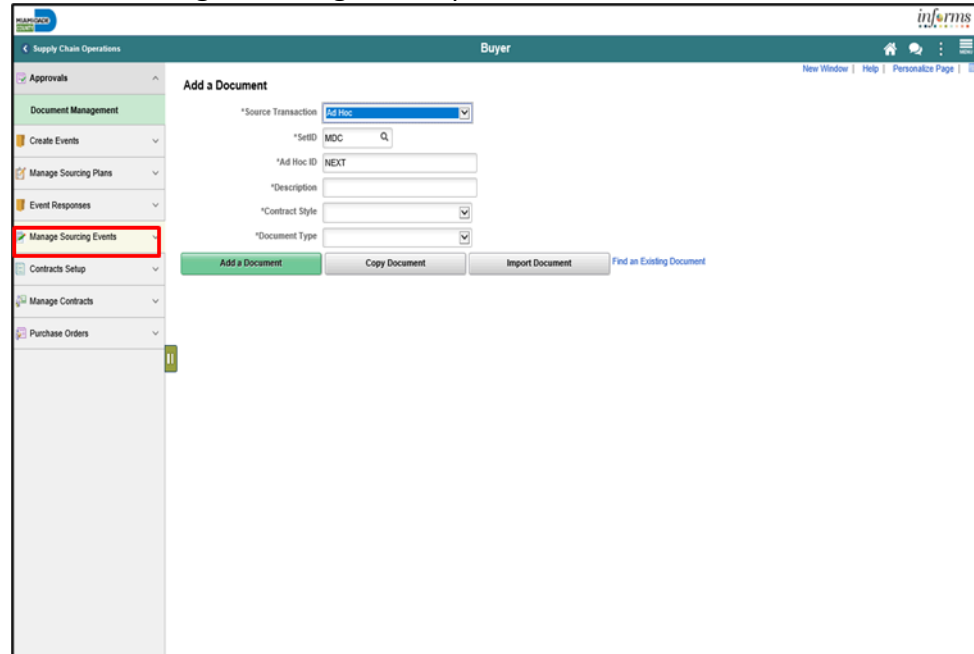
Term	Definition
Create New Version	Select this icon to prompt changes to an event. The new version will allow event changes to line items, event dates, and attachments, etc.
Generate Bid Event Packet	Select this to run the process to generate the Bid Packet. All event attachments, marked Display to Bidder, are merged into a .pdf file format.

Module 5: Creating Multiple Versions of Sourcing Events

Lesson 1: Creating Multiple Versions of Sourcing Events

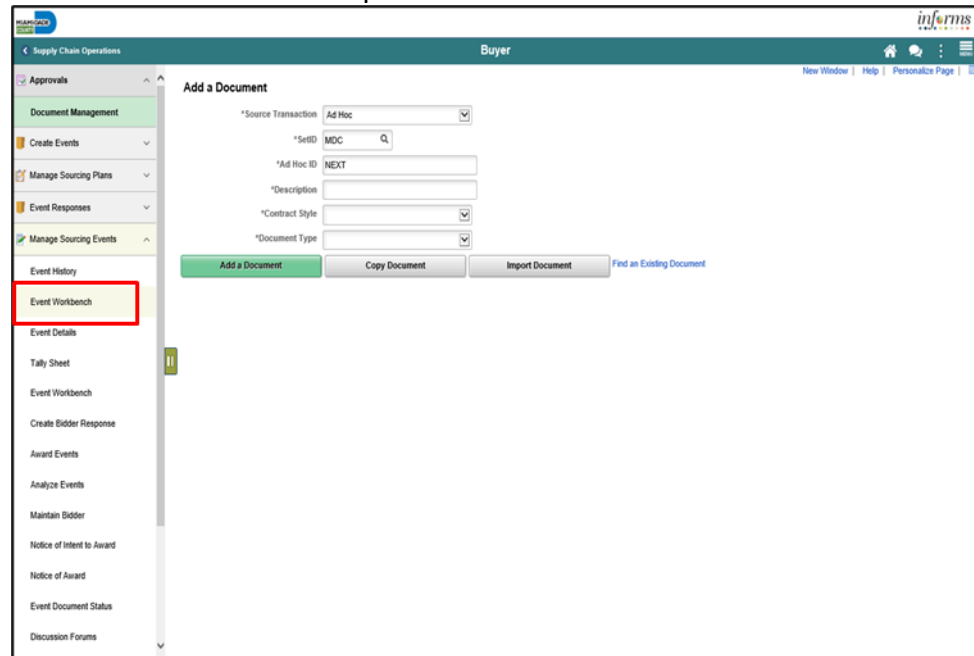
Navigate to: **Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer**

1. Select the **Manage Sourcing Events** pane.



The screenshot shows the 'Buyer' interface with the 'Add a Document' form. The left sidebar contains a list of navigation items: Approvals, Document Management, Create Events, Manage Sourcing Plans, Event Responses, **Manage Sourcing Events** (highlighted with a red box), Contracts Setup, Manage Contracts, and Purchase Orders. The main form area has the following fields: *Source Transaction (Ad Hoc), *SetID (MDC), *Ad Hoc ID (NEXT), *Description, *Contract Style, and *Document Type. At the bottom of the form are buttons for 'Add a Document', 'Copy Document', and 'Import Document', along with a link 'Find an Existing Document'.

2. Select the **Event Workbench** pane.



The screenshot shows the 'Buyer' interface with the 'Add a Document' form. The left sidebar contains a list of navigation items: Approvals, Document Management, Create Events, Manage Sourcing Plans, Event Responses, Manage Sourcing Events, **Event Workbench** (highlighted with a red box), Event History, Event Details, Tally Sheet, Event Workbench, Create Bidder Response, Award Events, Analyze Events, Maintain Bidder, Notice of Intent to Award, Notice of Award, Event Document Status, and Discussion Forums. The main form area is identical to the previous screenshot, showing the 'Add a Document' form with fields for *Source Transaction, *SetID, *Ad Hoc ID, *Description, *Contract Style, and *Document Type, and buttons for 'Add a Document', 'Copy Document', and 'Import Document'.

Module 5: Creating Multiple Versions of Sourcing Events

Lesson 1: Creating Multiple Versions of Sourcing Events

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

The screenshot shows the 'Event Workbench' search interface. The 'Search Criteria' section includes fields for Business Unit, Event ID, Created By, Event Format, Event Type, Event Status, Associated With Plan, From Start Date, From End Date, To Start Date, To End Date, Category, Item ID, Description, and Plan Name. There are also checkboxes for 'Only show Events I created', 'Only show Active Events', and 'Use my search defaults'. The 'Search' button is highlighted with a red box. Below the search criteria is a 'Legend' section and a 'Search Results' table.

Event ID	Name	Format	Type	Unit	Status
0000000273	Test Form #2	Buy	RFx	AD	11/30/2021 02:20 PM
0000000272	TEST Forms	Buy	RFx	AD	11/30/2021 02:11 PM
0000000271	Link Attachment	Buy	RFx	AD	12/31/2021 02:15 PM
0000000260	IN000918 - Record ...	Buy	RFx	AD	11/30/2021 03:28 PM
0000000291	test	Buy	RFx	AD	Open
0000000290	Email Notice #2 Te...	Buy	RFx	AD	11/29/2021 01:30 PM
0000000281	Name	RFI	RFx	ID	Pending Post Approval
0000000277	Marie's Test	Buy	RFx	ID	Open
0000000287	TEST RFx	Buy	RFx	ID	11/14/2021 10:43 PM
0000000284	Buy 100 computer f...	Buy	RFx	ID	Open
0000000268	TEST	RFI	RFx	ID	11/12/2021 08:00 PM
0000000289	Testing Grouped Li...	Buy	RFx	AU	11/11/2021 03:00 PM
0000000270	TEST Default QTY	Buy	RFx	AD	Event Completed
0000000268	TEST Notifications...	Buy	RFx	ID	Open
0000000265	Event to test awar...	Buy	RFx	ID	Pending Award
0000000279	test 564	Buy	RFx	AD	Event Completed

- Select the **Create New Version** icon.

Note: A new version can only be added before the event has been closed. The Legend can be expanded to explain the icon definitions.

The screenshot shows the 'Event Workbench' search interface, similar to the previous one. The 'Search' button is highlighted with a red box. Below the search criteria is a 'Legend' section and a 'Search Results' table. The 'Create New Version' icon is highlighted with a red box.

Event ID	Name	Format	Type	Unit	Status
0000000273	Test Form #2	Buy	RFx	AD	11/30/2021 02:20 PM
0000000272	TEST Forms	Buy	RFx	AD	11/30/2021 02:11 PM
0000000271	Link Attachment	Buy	RFx	AD	12/31/2021 02:15 PM
0000000260	IN000918 - Record ...	Buy	RFx	AD	11/30/2021 03:28 PM
0000000291	test	Buy	RFx	AD	Open
0000000290	Email Notice #2 Te...	Buy	RFx	AD	11/29/2021 01:30 PM
0000000281	Name	RFI	RFx	ID	Pending Post Approval
0000000277	Marie's Test	Buy	RFx	ID	Open
0000000287	TEST RFx	Buy	RFx	ID	11/14/2021 10:43 PM
0000000284	Buy 100 computer f...	Buy	RFx	ID	Open
0000000268	TEST	RFI	RFx	ID	11/12/2021 08:00 PM
0000000289	Testing Grouped Li...	Buy	RFx	AU	11/11/2021 03:00 PM
0000000270	TEST Default QTY	Buy	RFx	AD	Event Completed
0000000268	TEST Notifications...	Buy	RFx	ID	Open
0000000265	Event to test awar...	Buy	RFx	ID	Pending Award
0000000279	test 564	Buy	RFx	AD	Event Completed

Module 5: Creating Multiple Versions of Sourcing Events

Lesson 1: Creating Multiple Versions of Sourcing Events

5. Select the **Yes** button.

The screenshot shows the 'Buyer Event Workbench' interface. A modal dialog titled 'Create New Version? (18058,8129)' is displayed in the center. The dialog contains the text: 'This operation will create a new version of the event. The current active version will not be inactivated until the new version has been posted. Select 'Yes' if you wish to create a new version for this event. Otherwise, select 'No.''. There are two buttons at the bottom of the dialog: 'Yes' (highlighted with a red box) and 'No'.

6. Confirm at the top that the Version has changed to the next number.

7. Make any applicable changes such as:

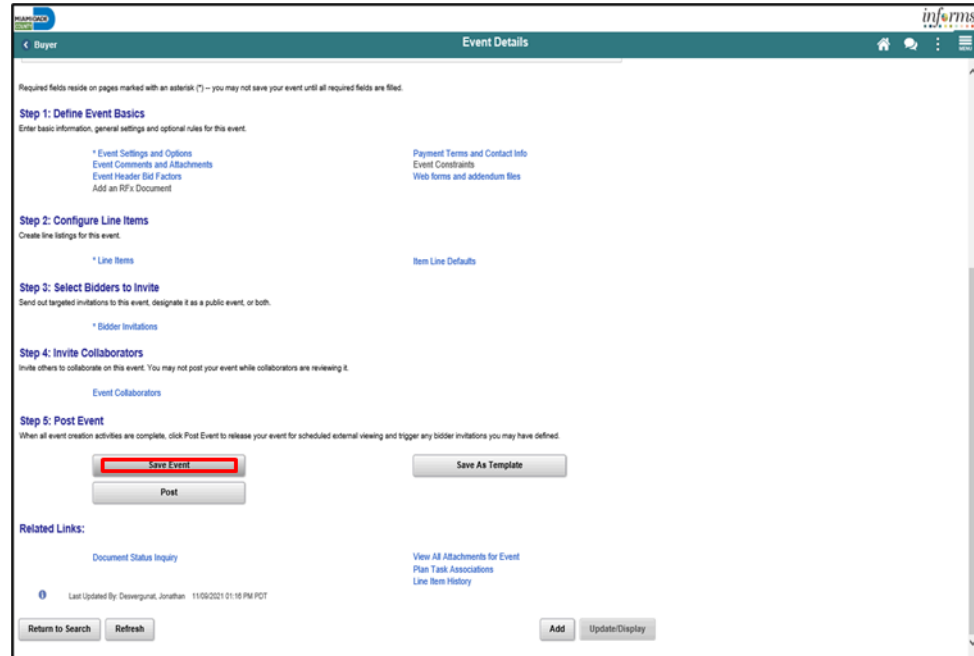
- Edit event dates/times
- Adding an Addendum File
- Updating Line Details
- Updating Bidder Invitations

The screenshot shows the 'Buyer Event Details' interface. The 'Event Summary' section is visible, showing the following details: Business Unit: AU, Event ID: 0000000289, Round: 1, Version: 2 (highlighted with a red box), Event Format: Buy. Below this, the 'Event Type' is RFX, 'Event Status' is Open, and 'Event Name' is 'Testing Grouped Lines'. The 'Description' field is empty and highlighted with a red box. To the right, there are fields for 'Time Zone' (EST), 'Preview Date' (11/09/2021), 'Start Date' (11/09/2021), 'Q&A End Date' (11/09/2021), 'End Date' (11/11/2021), and 'Time' (12:54AM). A 'Go' button is at the bottom right of the summary section. Below the summary, there are three steps: 'Step 1: Define Event Basics', 'Step 2: Configure Line Items', and 'Step 3: Select Bidders to Invite', each with a list of actions.

Module 5: Creating Multiple Versions of Sourcing Events

Lesson 1: Creating Multiple Versions of Sourcing Events

8. Select the **Save Event** button.



Event Details

Required fields reside on pages 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 Header Bid Factors
- Add an RFx Document
- Payment Terms and Contact Info
- Event Constraints
- Web forms and addendum files

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

- * Line Items
- Item Line Defaults

Step 3: Select Bidders to Invite
Send out targeted invitations 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 while collaborators are reviewing it.

Event Collaborators

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 (highlighted)

Post

Save As Template

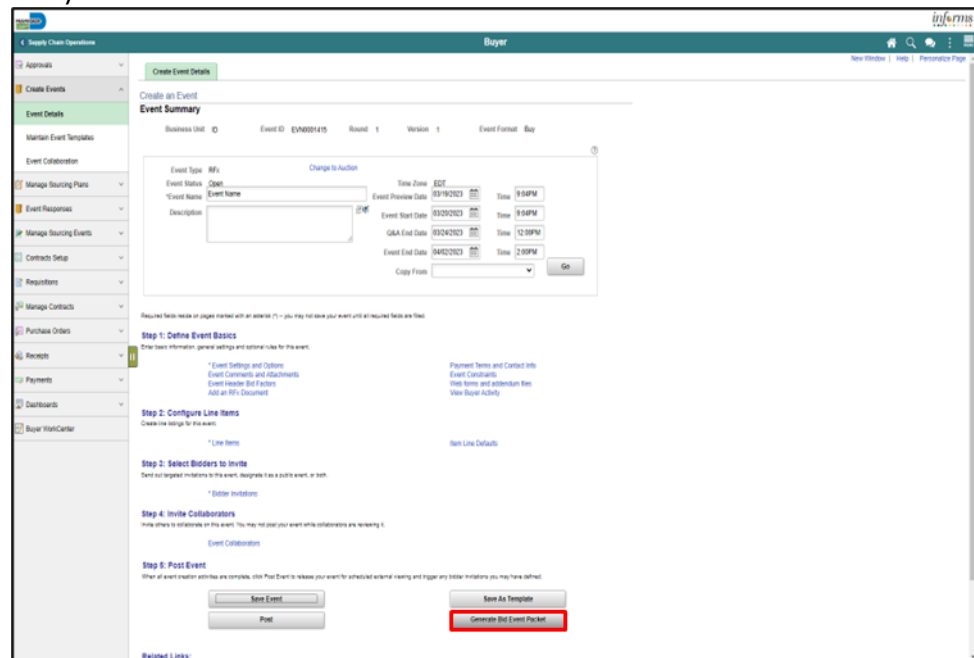
Related Links:

- Document Status Inquiry
- View All Attachments for Event
- Plan Task Associations
- Line Item History

Last Updated By: Doreenjurat, Jonathan 11/05/2021 01:16 PM PDT

Return to Search Refresh Add Update/Display

9. Select the **Generate Bid Event Packet** button (if attachments/addendums were added).



Event Details

Required fields reside on pages 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 Header Bid Factors
- Add an RFx Document
- Payment Terms and Contact Info
- Event Constraints
- Web forms and addendum files

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

- * Line Items
- Item Line Defaults

Step 3: Select Bidders to Invite
Send out targeted invitations 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 while collaborators are reviewing it.

Event Collaborators

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.

Generate Bid Event Packet (highlighted)

Post

Save As Template

Related Links:

- Document Status Inquiry
- View All Attachments for Event
- Plan Task Associations
- Line Item History

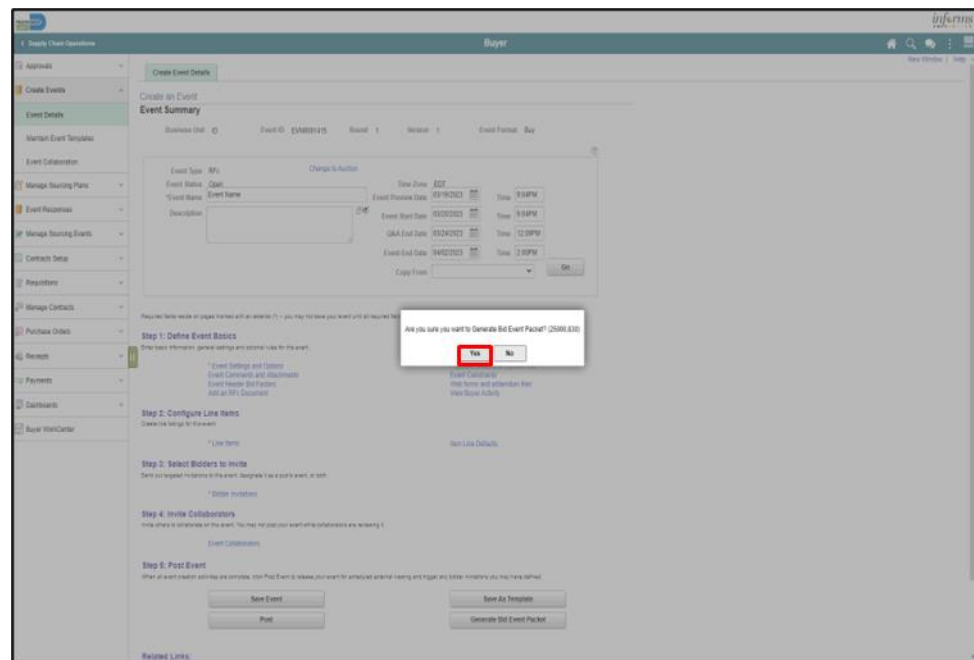
Last Updated By: Doreenjurat, Jonathan 11/05/2021 01:16 PM PDT

Return to Search Refresh Add Update/Display

Module 5: Creating Multiple Versions of Sourcing Events

Lesson 1: Creating Multiple Versions of Sourcing Events

10. Select the **Yes** button.



The screenshot shows the 'Create an Event' dialog in the Buyer portal. The dialog is titled 'Event Summary' and contains the following information:

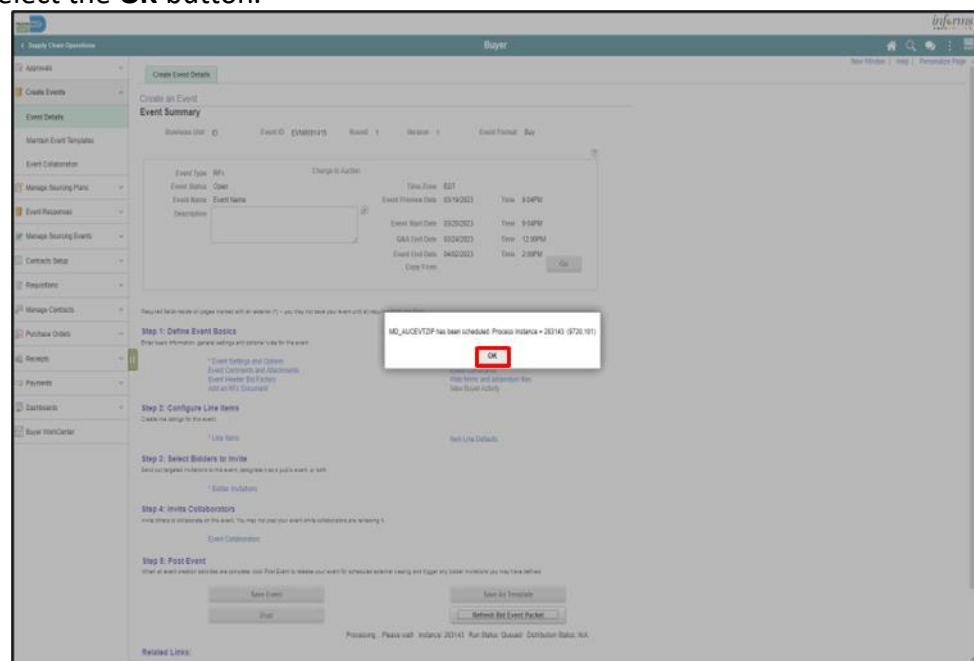
- Business Unit: ID
- Event ID: EVN001415
- Round: 1
- Version: 1
- Event Format: Buy

The 'Event Details' section includes:

- Event Type: RFx
- Event Status: Open
- Event Name: [Text Box]
- Description: [Text Box]
- Time Zone: EDT
- Event Start Date: 03/19/2023
- Event End Date: 03/20/2023
- GBA End Date: 03/24/2023
- Event End Date: 04/02/2023
- Copy From: [Dropdown]

The 'Generate Bid Event Packet' button is highlighted with a red box. A confirmation dialog is displayed over the main dialog, asking: 'Are you sure you want to Generate Bid Event Packet? (25000.000)'. The 'Yes' button in this dialog is highlighted with a red box.

11. Select the **OK** button.



The screenshot shows the 'Create an Event' dialog in the Buyer portal. The dialog is titled 'Event Summary' and contains the following information:

- Business Unit: ID
- Event ID: EVN001415
- Round: 1
- Version: 1
- Event Format: Buy

The 'Event Details' section includes:

- Event Type: RFx
- Event Status: Open
- Event Name: [Text Box]
- Description: [Text Box]
- Time Zone: EDT
- Event Start Date: 03/19/2023
- Event End Date: 03/20/2023
- GBA End Date: 03/24/2023
- Event End Date: 04/02/2023
- Copy From: [Dropdown]

The 'Generate Bid Event Packet' button is highlighted with a red box. A confirmation dialog is displayed over the main dialog, asking: 'MO_AUCEYTOP has been scheduled. Process Instance = 20140 (9726.10)'. The 'OK' button in this dialog is highlighted with a red box.

Lesson 1: Creating Multiple Versions of Sourcing Events

Buyer

Create Event Details

Create an Event Event Summary

Business Unit	Event ID	Round	Version	Event Format	Buy
	EVEN001415	1	1		

Event Type: APX

Event Status: Open

Event Name: Event Name

Description:

Change to Auction

Time Zone: EDT

Event Previous Date: 03/19/2023

Time: 9:04PM

Event Start Date: 03/20/2023

Time: 9:04PM

GMA End Date: 03/24/2023

Time: 12:00PM

GMA End Date: 04/02/2023

Time: 2:00PM

Copy From

Go

Required fields noted on pages marked with an asterisk (*) - you may not leave 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 Contracts and Attachments
- * Event Buyer Bid Factors
- Add an RFP Document
- Payment Terms and Contact Info
- Event Constraints
- Web forms and extension fees
- View Buyer Activity

Step 2: Configure Line Items

Create line items for this event.

- * Line Items
- Item Line Defaults

Step 3: Select Bidders to Invite

Select our targeted invitees to the 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 while collaborators are working it.

- Event Collaborator

Step 5: Post Event

Other than 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

Save As Template

Release This Event Publicly

Processing - Please wait! Instance: 201143 Run Status: Queue Distribution Status: N/A

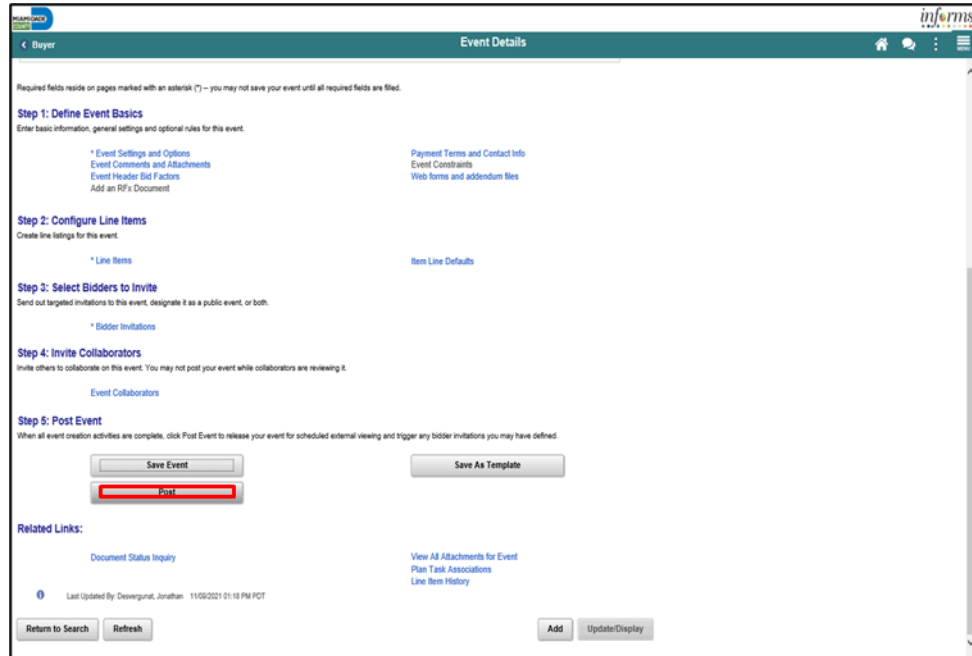
Related Links:

The screenshot shows the 'Create an Event' workflow in the EMS. The 'Event Details' tab is selected, showing a form for creating a new event. A modal dialog box is open, indicating that the event has been created successfully. The dialog box has a title bar 'Event Management System' and a message: 'Event Created Successfully! The event has been created successfully. You can now manage the event details from the Event Details page.' Below the message are two buttons: 'OK' (highlighted with a red box) and 'Cancel'.

Module 5: Creating Multiple Versions of Sourcing Events

Lesson 1: Creating Multiple Versions of Sourcing Events

14. Select the **Post** button.



Required fields reside on pages 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 Header Bid Factors
- Add an RF's Document
- Payment Terms and Contact Info
- Event Constraints
- Web forms and addendum files

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

- * Line Items
- Item Line Defaults

Step 3: Select Bidders to Invite
Send out targeted invitations 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 while collaborators are reviewing it.

Event Collaborators

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event Save As Template

Post

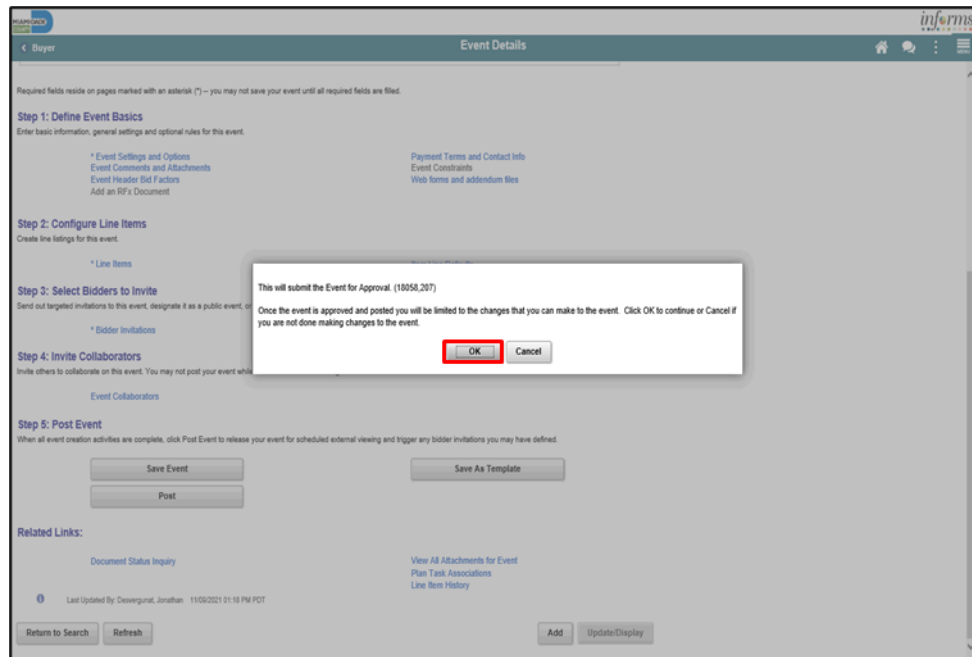
Related Links:

- Document Status Inquiry
- View All Attachments for Event
- Plan Task Associations
- Line Item History

0 Last Updated By: Desvergnat, Jonathan 11/05/2021 01:18 PM PDT

Return to Search Refresh Add Update/Display

15. Select the **OK** button.



Required fields reside on pages 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 Header Bid Factors
- Add an RF's Document
- Payment Terms and Contact Info
- Event Constraints
- Web forms and addendum files

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

- * Line Items

Step 3: Select Bidders to Invite
Send out targeted invitations 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 while collaborators are reviewing it.

Event Collaborators

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event Save As Template

Post

Related Links:

- Document Status Inquiry
- View All Attachments for Event
- Plan Task Associations
- Line Item History

0 Last Updated By: Desvergnat, Jonathan 11/05/2021 01:18 PM PDT

Return to Search Refresh Add Update/Display

This will submit the Event for Approval. (10050,207)
Once 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

Module 5: Creating Multiple Versions of Sourcing Events Summary

- Create multiple versions of sourcing events



Module 6: View Event Q&A Forum

Module 1: Overview

At the conclusion of this lesson, the user will be able to:

- View event Q&A forum

Module 6: View Event Q&A Forum

Lesson 1: Introduction

Bidders can use an event Q&A forum to communicate with the event creator. Strategic Sourcing provides an event-specific forum for bidders to ask questions regarding the event and have them answered by the buyer.

Buyers are to use processes in place when addressing questions and issue corresponding addendums as needed to provide responses to the Bidder community.

The event buyer and associated contacts of each event will receive an email notifying of questions/comments posted on the event specific Q&A forum. In turn, the Buyer can provide feedback through an addendum so that all Bidders have access to the information.

Module 6: View Event Q&A Forum

Key Terms

The following key terms are used in this lesson:



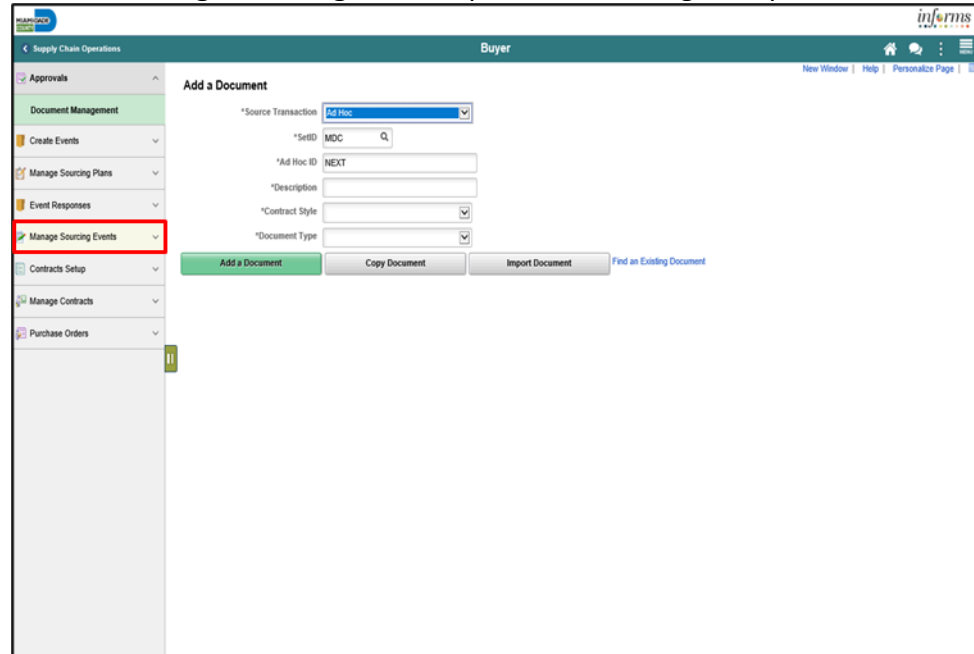
Term	Definition
Q&A Forum	Forum available to communicate questions and comments related to a specific event.

Module 6: View Event Q&A Forum

Lesson 1: View Event Q&A Forum

Navigate to: **Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer**

1. Select the **Manage Sourcing Events** option in the navigation pane.

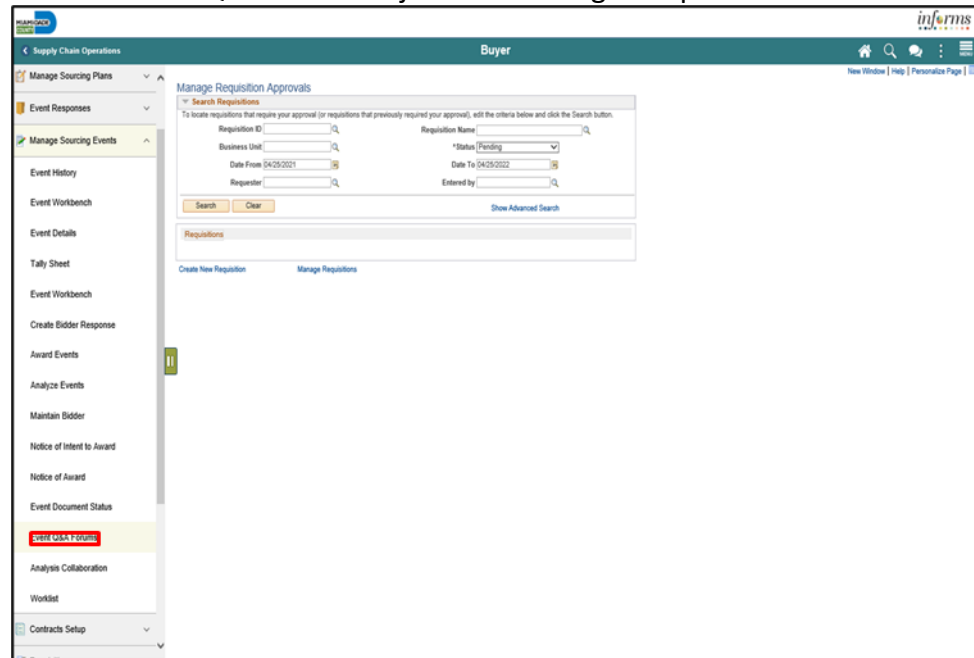


The screenshot shows the 'Buyer' navigation pane on the left with 'Manage Sourcing Events' highlighted in red. The main content area displays the 'Add a Document' form. The form includes the following fields:

- *Source Transaction:
- *SetID:
- *Ad Hoc ID:
- *Description:
- *Contract Style:
- *Document Type:

At the bottom of the form are three buttons: 'Add a Document' (green), 'Copy Document' (grey), and 'Import Document' (grey). A link 'Find an Existing Document' is also present.

2. Select the **Event Q&A Forum** object in the navigation pane.



The screenshot shows the 'Buyer' navigation pane on the left with 'Manage Sourcing Events' expanded and 'Event Q&A Forum' highlighted in red. The main content area displays the 'Manage Requisition Approvals' page. The page includes a search section with the following fields:

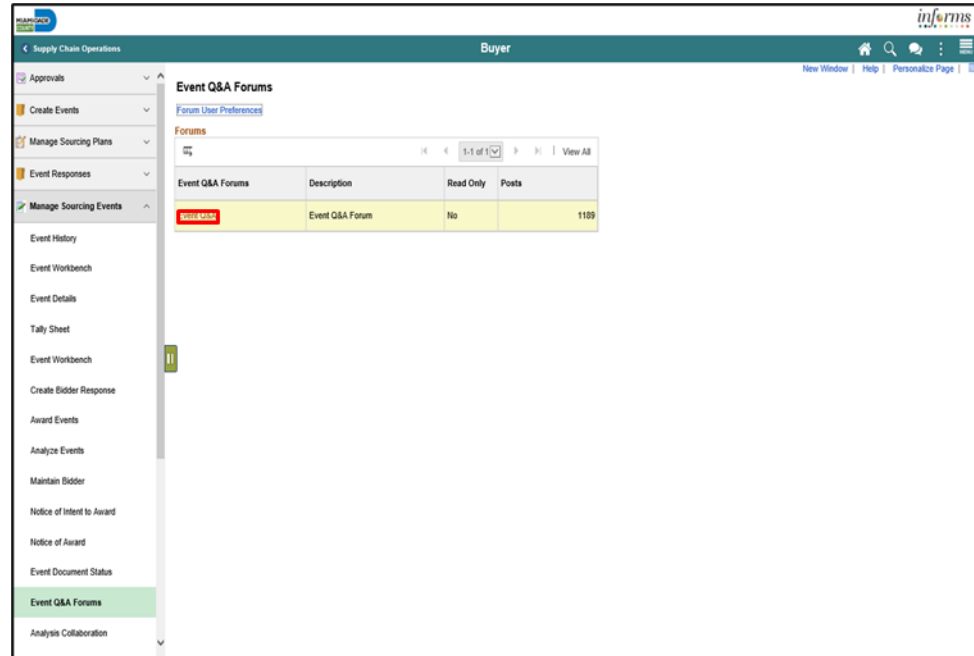
- Requisition ID:
- Business Unit:
- Date From:
- Requester:
- Requisition Name:
- Status:
- Date To:
- Entered by:

Below the search fields are 'Search' and 'Clear' buttons, and a link 'Show Advanced Search'. At the bottom of the page are two links: 'Create New Requisition' and 'Manage Requisitions'.

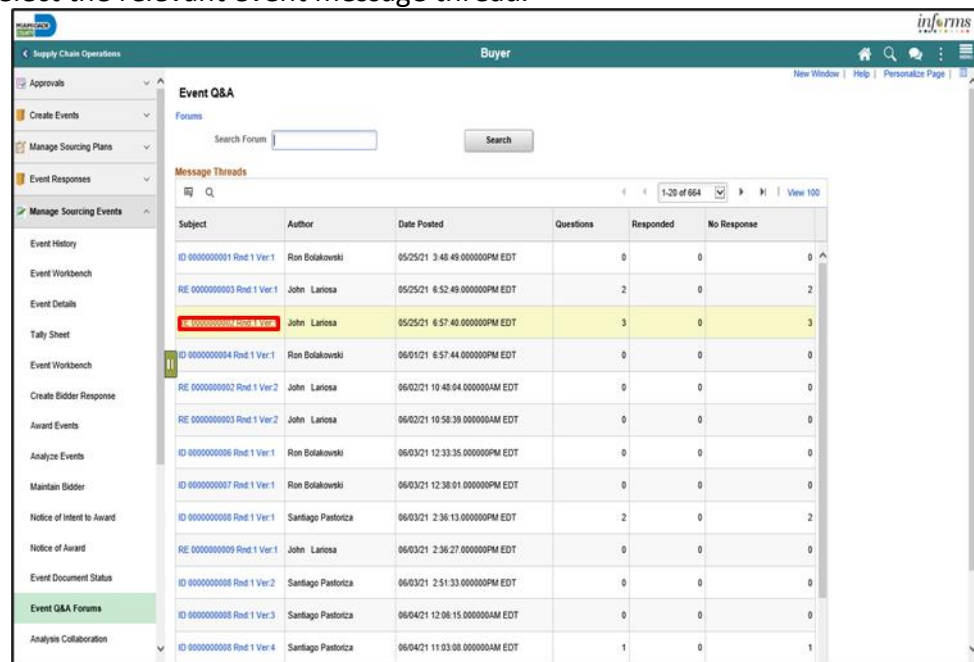
Module 6: View Event Q&A Forum

Lesson 1: View Event Q&A Forum

3. Select the **Event Q&A** link.



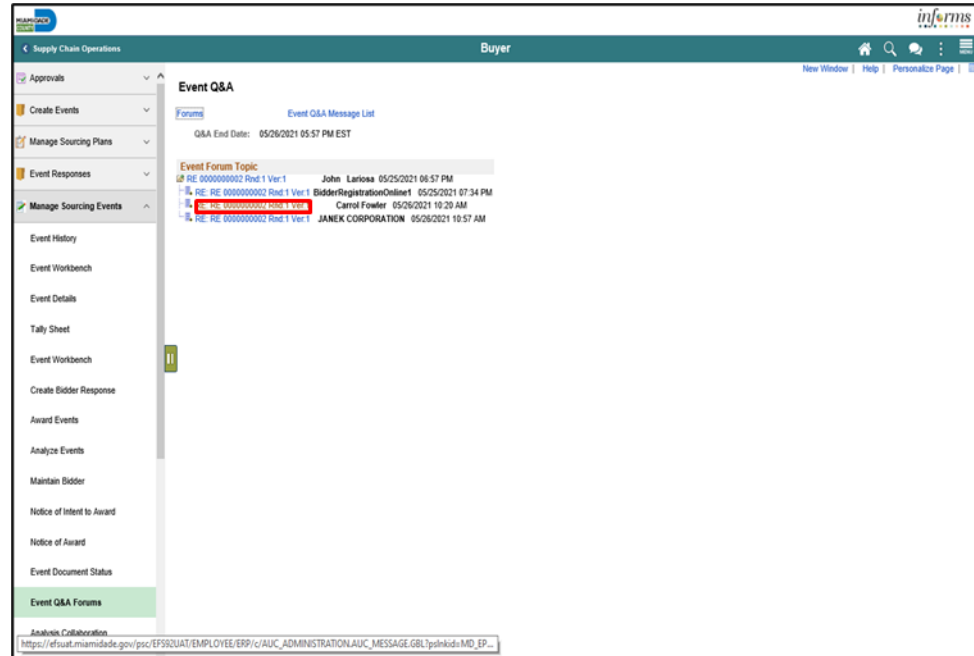
4. Select the relevant event message thread.



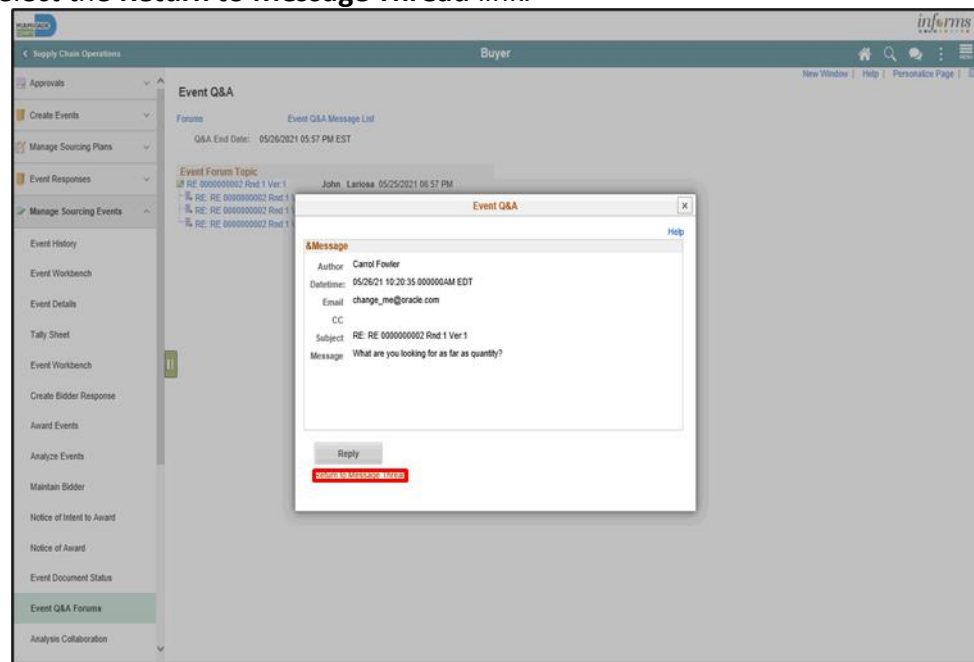
Module 6: View Event Q&A Forum

Lesson 1: View Event Q&A Forum

5. Select the relevant links within the Forum.



6. Select the **Return to Message Thread** link.



Module 6: View Event Q&A Forum

Module 6: View
Event Q&A
Forum Summary

Now that the lesson has been completed, users should be able to:

- [View Event Q&A Forum](#)



Module 7: Analyzing an Event

Module 7: Overview

At the conclusion of this lesson, users will be able to:

- View Merged Files and Vendor Files
- Review Forms and Addendum
- Analyze an Event in the Aggregate
- Analyze an Event by Line
- Analyze an Event by Group
- Analyze an RFI Event

Module 7: Analyzing an Event

Module 6: Introduction

After a Buyer has received bids in response to sourcing events, the bid analysis process can begin. This process will include reviewing merged files, vendor files, webforms, and addendums to determine responsive/responsible bidders to an event. This process may lead to analyzing bid responses in the tally sheet page.

Buyers must wait until the end of the event to analyze and award the event.

When analyzing events, the information can be sorted using different criteria. For example, by lowest price, or lowest total cost to display the best bid.

Strategic Sourcing can analyze an event and award in the aggregate, line, or by group.

Established policies and ordinances are to be adhered to when analyzing bids. The tally sheet is a tool available through the sourcing module but requires additional verification to ensure proper application of established preferences or set asides.

Module 7: Analyzing an Event

Module 6: Key Terms

The following key terms are used in this lesson:

Term	Definition
Analyze by Aggregate	Analyzing all pricing submitted by all bidders for all lines in the aggregate. Review each bidder's bid for the total of all the items in an event.
Analyze by Line	Analyzing pricing submitted by all bidders on a line-by-line basis. Review each bidder's bid for each line item in the event.
Analyze by Group	Analyzing pricing submitted by all bidders on a group-by-group basis. Review each bidder's bid for each group in the event.
Tally Sheet	An excel spreadsheet produced by the system from the date on the analyze page reflecting all pricing submitted by bidders and calculations based on bid factors. Excel document listing the details of the bids received, Bidders information, and sum of the lines, groups of the events.
Contract Set-Aside	A contract that is set-aside for award only to Miami-Dade certified Small Business Enterprise (SBE) firms.
VBE Preference	A contract preference afforded to local, certified Veteran-Owned Business Enterprises (VBE). VBE's are certified by the State of Florida. A preference of 5% is deducted from a certified VBE when evaluating prices submitted against non VBE firms. If a VBE firm is also a certified SBE firm, the preferences do not aggregate, only the higher preference is applied.

Module 7: Analyzing an Event

Module 6: Key Terms

The following key terms are used in this lesson:

Term	Definition
Local Preference	A preference is afforded to firms meeting the criteria of a local business as detailed in 2-8.5 of the Miami-Dade Code of Ordinances.
Locally HQ Preference	A preference afforded to firms meeting the criteria of a locally headquartered business as detailed in 2-8.5 of the Miami-Dade Code of Ordinances.
Threshold	<p>5% - the threshold between any local low bidder's price and any locally headquartered bidder's price in order to initiate a request to submit a Best and Final offer (BAFO) from the affected bidders</p> <p>10% - the threshold between any non-local low bidder's price and any local bidder's price in order to initiate a request to submit a Best and Final offer (BAFO) from the affected the bidders</p> <p>15% - the threshold between any non-local low bidder's price and any locally headquartered bidder's price in order to initiate a request to submit a Best and Final offer (BAFO) from the affected bidders</p>
Bid Summary	<p>A system generated report sent to bidders upon submittal of a bid listing the pricing, answers to bid factor questions, documents submitted by the bidder, and the date/time the of the bid submittal.</p> <p>A system generated file that gives a summary of what was submitted.</p>
Vendor Files	<p>All files uploaded by a bidder when submitting a bid.</p> <p>Vendor files are the individual files that were uploaded by the bidder.</p>
Merged Files	<p>Merged documents in PDF format consisting of all documents uploaded by buyers as well as bidder on an event. There are three types of merged documents, the Solicitation Package, containing all documents attached to a sourcing event by the buyer, a PDF document containing all documents uploaded by each bidder on an event, and a Tabulation Package, consisting off all documents uploaded by the buyer as well as all documents uploaded by all bidders on an event.</p> <p>Combined PDF documents pertaining to the event which include solicitation, tabulation, and bid proposal packets.</p>

Module 7: Analyzing an Event

Lesson 1: View Merged Files and Vendor Files

To analyze an event, review of the merged files and vendor files is necessary.

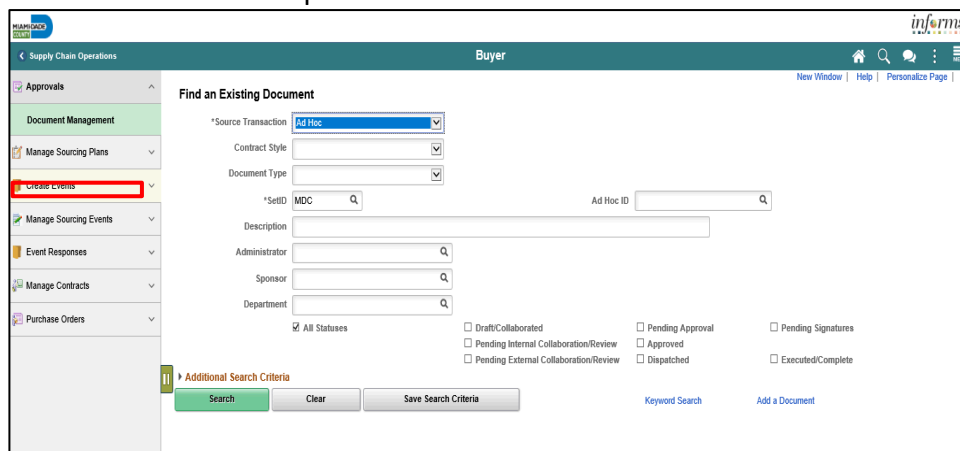
Vendor files are the individual files that were uploaded by the bidder while bidding on an event. After a bidder submits a bid, they receive a bid summary. The bid summary is a system generated file that gives a summary of what was submitted. The bid summary also lists any attachments that were uploaded during the bid process, as well as web forms and any applicable addendum acknowledgements.

There are (3) types of merged files.

1. Solicitation packet-anything that is uploaded to the event during creation.
2. Tabulation packet-includes the solicitation packet and the individual bid responses.
3. Bid proposals packet-includes the details of all the bidders and their proposals.

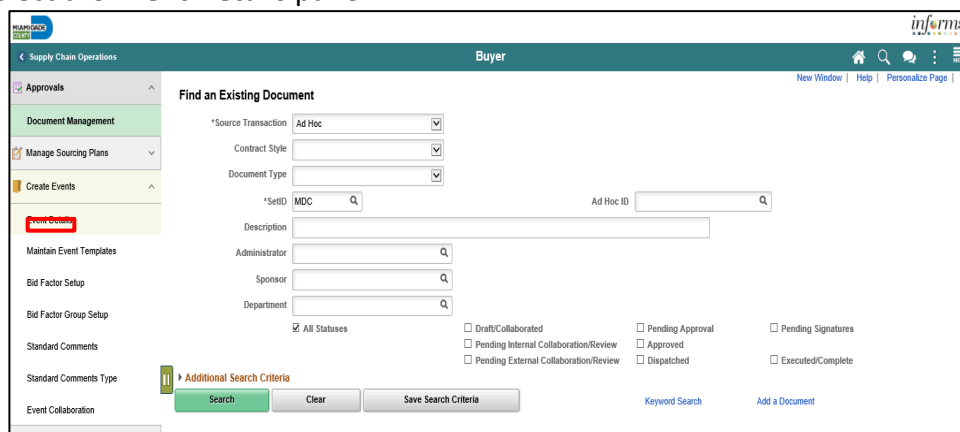
Navigate to: **Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer**

1. Select the **Create Events** pane.



The screenshot shows the 'Buyer' interface with the 'Find an Existing Document' form. The left sidebar contains a list of options: Approvals, Document Management, Manage Sourcing Plans, **Create Events** (highlighted with a red box), Manage Sourcing Events, Event Responses, Manage Contracts, and Purchase Orders. The main form area includes fields for *Source Transaction (Ad Hoc), Contract Style, Document Type, *SetID (MDC), Ad Hoc ID, Description, Administrator, Sponsor, and Department. There are also checkboxes for All Statuses, Draft/Collaborated, Pending Approval, Pending Signatures, Pending Internal Collaboration/Review, Approved, Dispatched, Pending External Collaboration/Review, and Executed/Complete. At the bottom, there are buttons for Search, Clear, and Save Search Criteria, along with links for Keyword Search and Add a Document.

2. Select the **Event Details** pane.

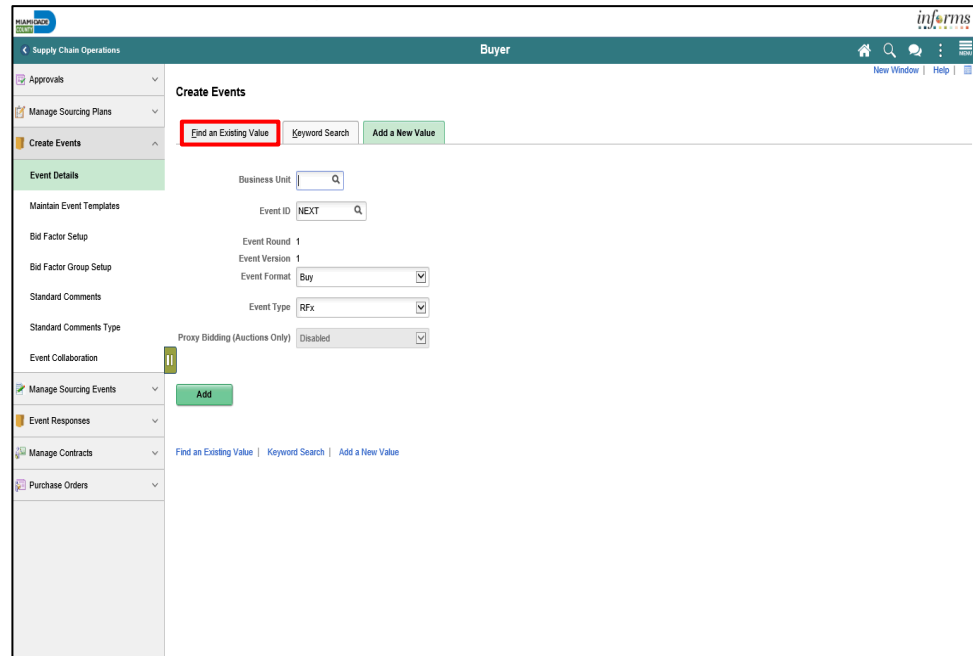


The screenshot shows the 'Buyer' interface with the 'Find an Existing Document' form. The left sidebar contains a list of options: Approvals, Document Management, Manage Sourcing Plans, Create Events, **Event Details** (highlighted with a red box), Maintain Event Templates, Bid Factor Setup, Bid Factor Group Setup, Standard Comments, Standard Comments Type, and Event Collaboration. The main form area is identical to the previous screenshot, showing fields for *Source Transaction, Contract Style, Document Type, *SetID, Ad Hoc ID, Description, Administrator, Sponsor, and Department, along with various status checkboxes and search buttons.

Module 7: Analyzing an Event

Lesson 1: View Merged Files and Vendor Files

3. Select the **Find an Existing Value** tab.

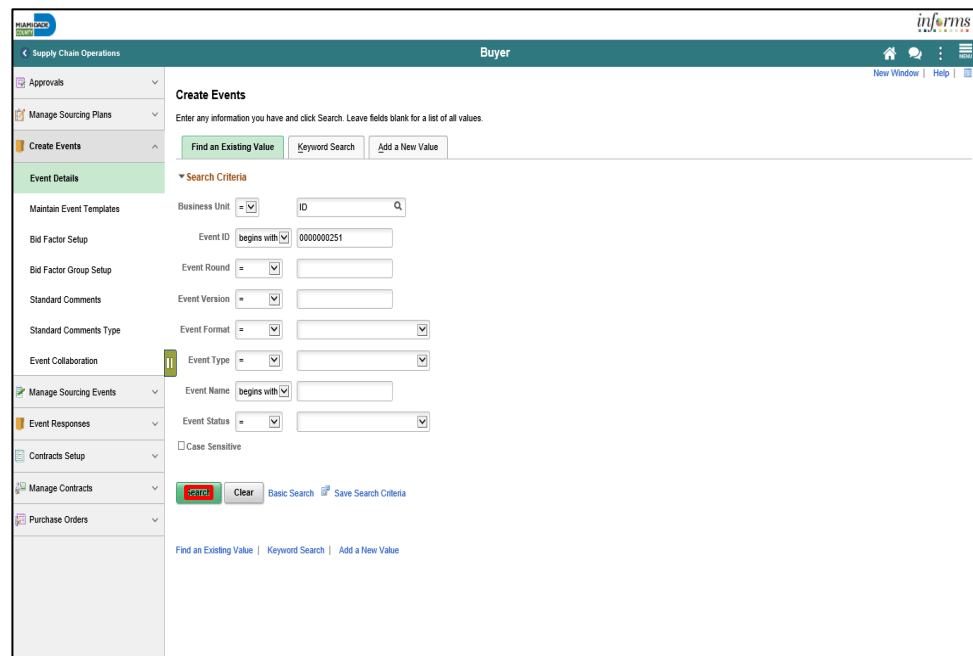


The screenshot shows the 'Create Events' page in the Buyer interface. The 'Find an Existing Value' tab is highlighted with a red box. The page includes a sidebar with navigation options like Approvals, Manage Sourcing Plans, Create Events, Event Details, Maintain Event Templates, Bid Factor Setup, Bid Factor Group Setup, Standard Comments, Standard Comments Type, Event Collaboration, Manage Sourcing Events, Event Responses, Manage Contracts, and Purchase Orders. The main content area has fields for Business Unit, Event ID (with a dropdown set to 'NEXT'), Event Round (set to '1'), Event Version (set to '1'), Event Format (set to 'Buy'), Event Type (set to 'RFx'), and Proxy Bidding (Auctions Only) (set to 'Disabled'). There is an 'Add' button and a 'Find an Existing Value' link.

4. Input applicable search details.

5. Select the **Search** button.

Note: Be sure to select the latest version of the event.

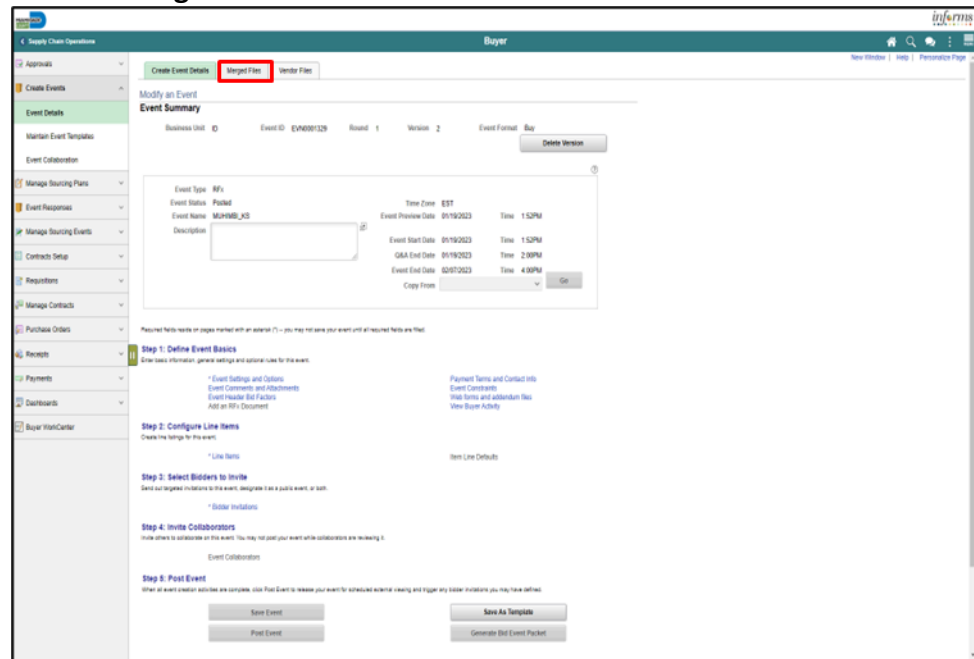


The screenshot shows the 'Create Events' page in the Buyer interface, specifically the search criteria section. The 'Search' button is highlighted with a red box. The search criteria include Business Unit (dropdown), Event ID (dropdown set to 'begins with' and text input '0000000251'), Event Round (dropdown set to '=' and text input), Event Version (dropdown set to '=' and text input), Event Format (dropdown set to '=' and text input), Event Type (dropdown set to '=' and text input), Event Name (dropdown set to 'begins with' and text input), and Event Status (dropdown set to '=' and text input). There is also a 'Case Sensitive' checkbox. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. The 'Find an Existing Value' link is also present.

Module 7: Analyzing an Event

Lesson 1: View Merged Files and Vendor Files

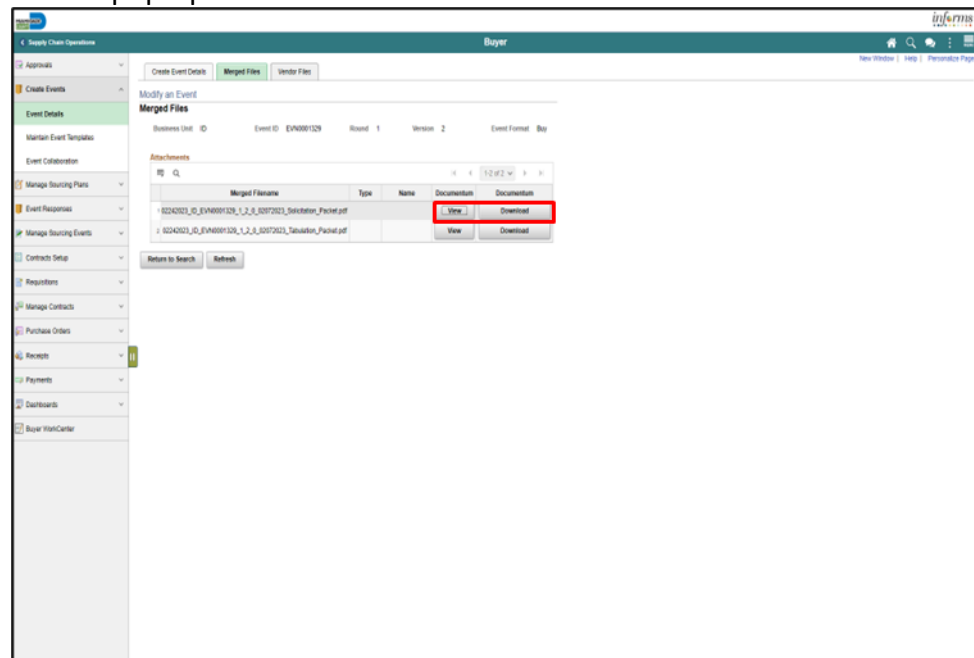
6. Select the **Merged Files** tab.



The screenshot shows the 'Buyer' interface with the 'Create Event Details' section. The 'Merged Files' tab is highlighted with a red box. The 'Event Summary' section displays event details for Event ID EVN000129, Round 1, Version 2. The 'Event Details' section includes fields for Event Type (RFI), Event Status (Posted), Event Name (MCHWB_XS), and a description field. The 'Event Dates' section shows Event Start Date (01/19/2023), Event End Date (02/01/2023), and Event Format (Buy). The 'Event Summary' section includes a 'Delete Version' button. The 'Event Details' section includes a 'Go' button. The 'Event Summary' section includes a 'Save Event' button, a 'Post Event' button, a 'Save As Template' button, and a 'Generate Bid Event Packet' button.

7. Select the **View** or **Download** button.

Note: Ensure pop-up blockers are disabled.

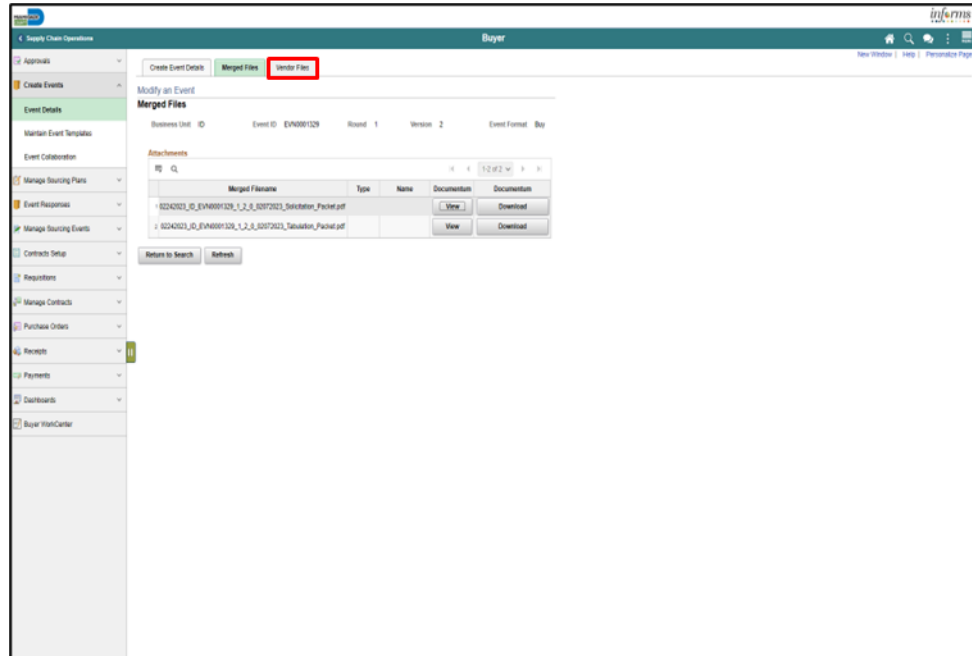


The screenshot shows the 'Buyer' interface with the 'Merged Files' tab selected. The 'Merged Files' section displays a table of merged files. The table has columns for Merged Filename, Type, Name, and Document. The first row shows a merged file with the filename '0242023_ID_EVN000129_1_2_0_0072023_Deliverable_Packet.pdf'. The 'View' and 'Download' buttons for this file are highlighted with a red box. The 'View' button is labeled 'View' and the 'Download' button is labeled 'Download'. The 'Merged Files' section also includes a 'Returns to Search' button and a 'Refresh' button.

Module 7: Analyzing an Event

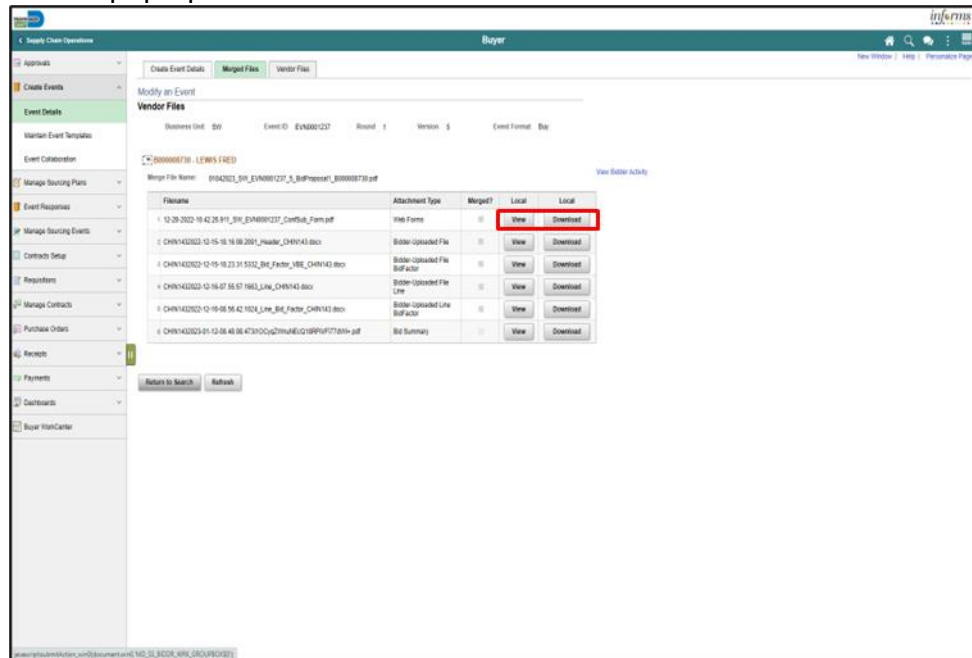
Lesson 1: View Merged Files and Vendor Files

8. Select the **Vendor Files** tab.



9. Select the **View** or **Download** button.

Note: Ensure pop-up blockers are disabled.



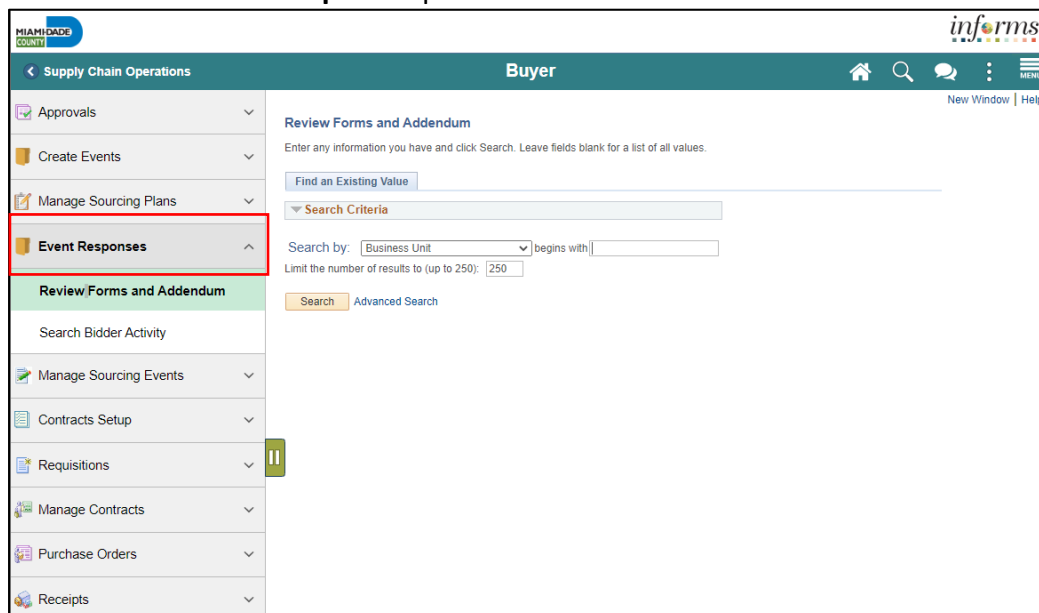
Module 7: Analyzing an Event

Lesson 2: Review Forms and Addendum

It is important to review forms and addendum as there may be cases in which a vendor didn't acknowledge an addendum and may cause the bid to be deemed non-responsive. The issuing department is to determine whether the change is a material change to the event. Additional guidance may be required for determination of responsiveness from the County Attorney's Office. The event buyer can utilize the information in the event such as acknowledgement of addendums as part of the evaluation process.

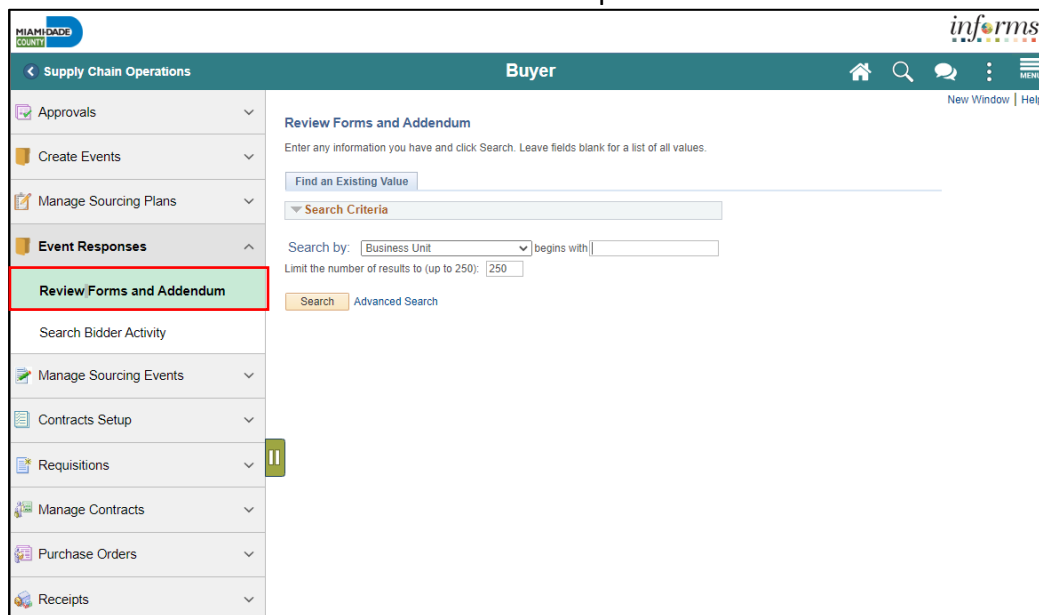
Navigate to: **Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer**

1. Select the **Event Responses** pane.



The screenshot shows the 'Buyer' interface within the 'Supply Chain Operations' section. The left sidebar contains a list of menu items: Approvals, Create Events, Manage Sourcing Plans, **Event Responses** (highlighted with a red box), Review Forms and Addendum, Search Bidder Activity, Manage Sourcing Events, Contracts Setup, Requisitions, Manage Contracts, Purchase Orders, and Receipts. The main content area is titled 'Review Forms and Addendum' and includes a search bar with the text 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below the search bar is a 'Find an Existing Value' button and a 'Search Criteria' dropdown. The search criteria are set to 'Business Unit' and 'begins with'. There is also a limit for the number of results (up to 250) and buttons for 'Search' and 'Advanced Search'.

2. Select the **Review Forms and Addendum** pane.

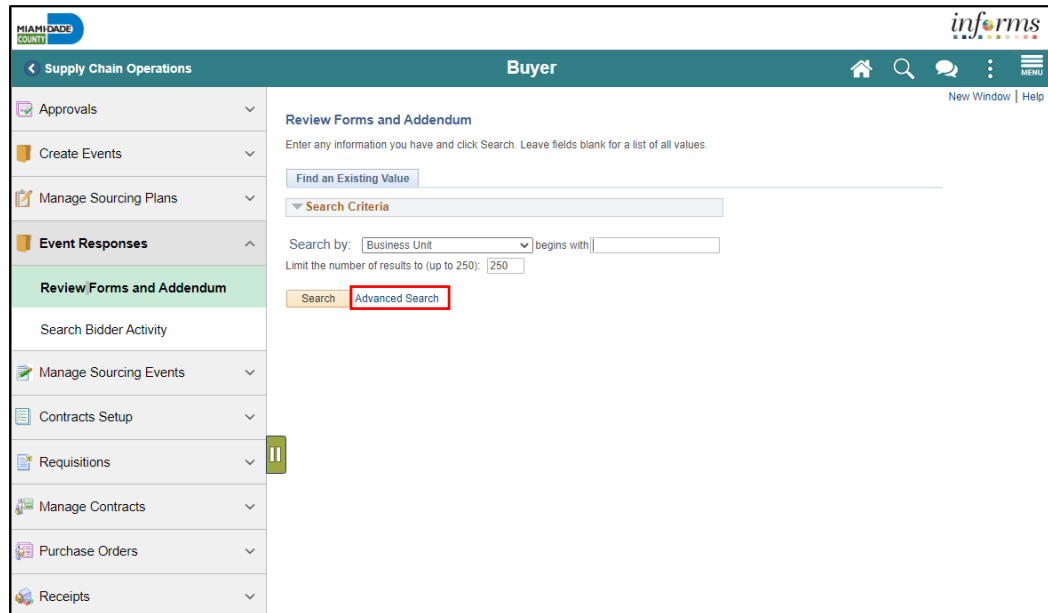


The screenshot shows the 'Buyer' interface within the 'Supply Chain Operations' section. The left sidebar contains a list of menu items: Approvals, Create Events, Manage Sourcing Plans, Event Responses, **Review Forms and Addendum** (highlighted with a red box), Search Bidder Activity, Manage Sourcing Events, Contracts Setup, Requisitions, Manage Contracts, Purchase Orders, and Receipts. The main content area is titled 'Review Forms and Addendum' and includes a search bar with the text 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below the search bar is a 'Find an Existing Value' button and a 'Search Criteria' dropdown. The search criteria are set to 'Business Unit' and 'begins with'. There is also a limit for the number of results (up to 250) and buttons for 'Search' and 'Advanced Search'.

Module 7: Analyzing an Event

Lesson 2: Review Forms and Addendum

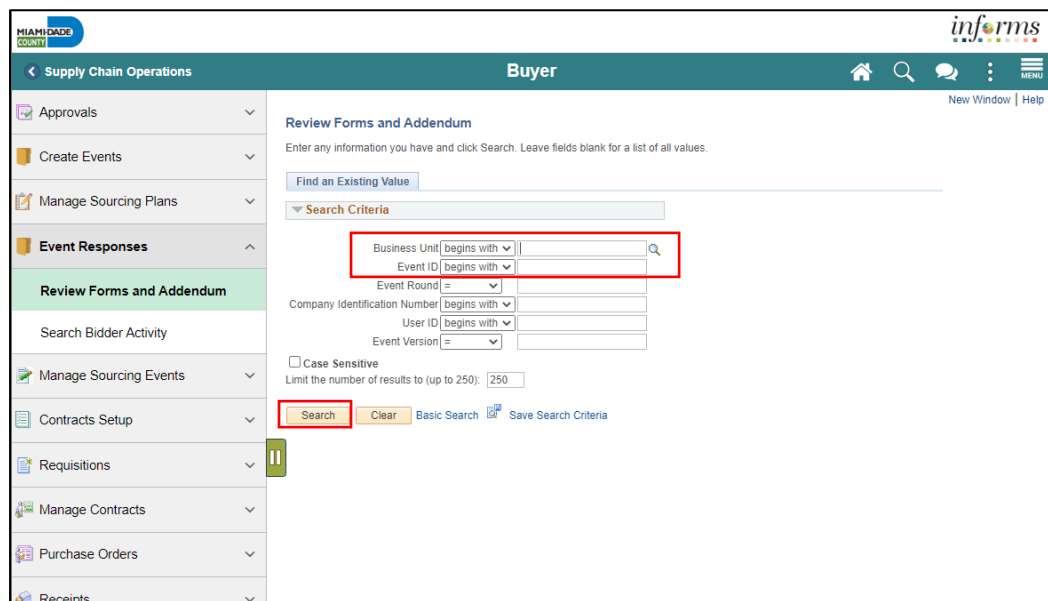
3. Select the **Advanced Search** link.



The screenshot shows the 'Buyer' portal interface. On the left is a navigation menu with options like Approvals, Create Events, Manage Sourcing Plans, Event Responses, Review Forms and Addendum (highlighted), Search Bidder Activity, Manage Sourcing Events, Contracts Setup, Requisitions, Manage Contracts, Purchase Orders, and Receipts. The main content area is titled 'Review Forms and Addendum' and includes a search bar with a 'Find an Existing Value' button. Below the search bar, there are search criteria fields: 'Search by: Business Unit' (with a dropdown arrow) and 'begins with' (with an input field). A 'Limit the number of results to (up to 250): 250' field is also present. At the bottom of the search section, there are two buttons: 'Search' and 'Advanced Search' (highlighted with a red box).

4. Input or search for the applicable **Business Unit** and **Event ID**.

5. Select the **Search** button.

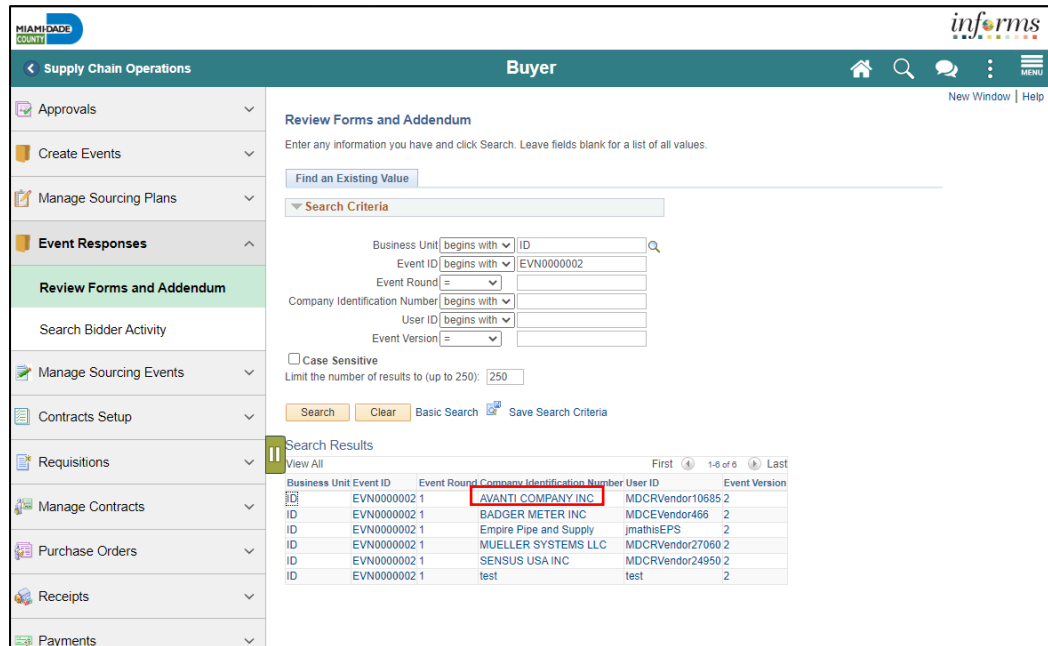


This screenshot shows the same 'Review Forms and Addendum' page, but with more search criteria filled in. The 'Business Unit' and 'Event ID' fields are now populated with values and are highlighted with a red box. Below these fields, there are additional criteria: 'Event Round' (with a dropdown arrow), 'Company Identification Number' (with a dropdown arrow), 'User ID' (with a dropdown arrow), and 'Event Version' (with a dropdown arrow). A 'Case Sensitive' checkbox is also visible. At the bottom of the search section, there are four buttons: 'Search' (highlighted with a red box), 'Clear', 'Basic Search', and 'Save Search Criteria'. The 'Limit the number of results to (up to 250): 250' field remains at the bottom.

Module 7: Analyzing an Event

Lesson 2: Review Forms and Addendum

6. Select the first **Company Identification Number** in the **Search Results**.



Review Forms and Addendum

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Business Unit ID

Event ID EVN0000002

Event Round

Company Identification Number

User ID

Event Version

☐ Case Sensitive

Limit the number of results to (up to 250): 250

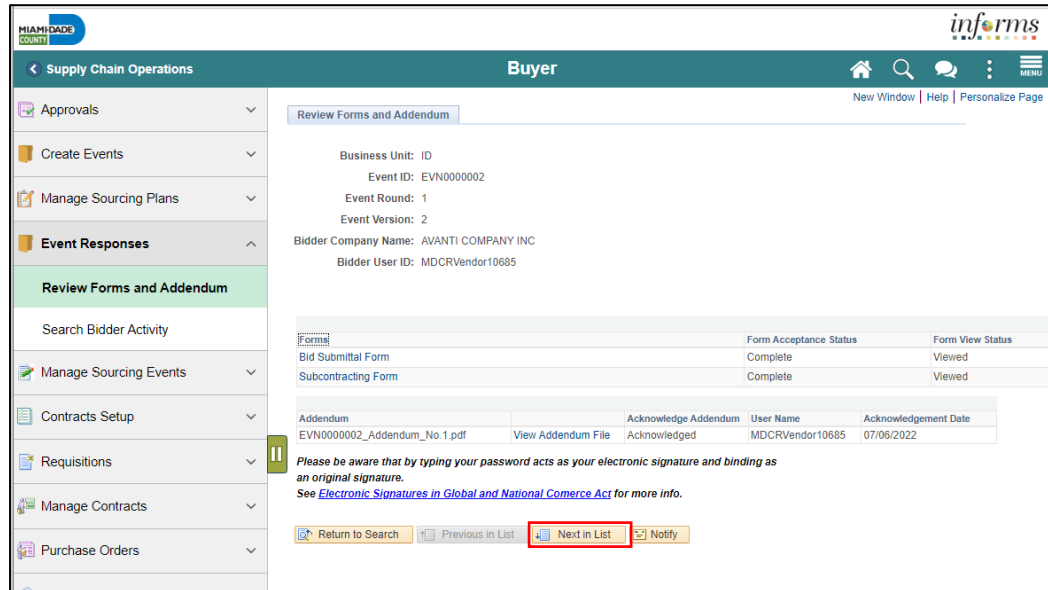
[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1-6 of 6 Last

Business Unit	Event ID	Event Round	Company Identification Number	User ID	Event Version
ID	EVN0000002	1	AVANTI COMPANY INC.	MDCRVendor10685	2
ID	EVN0000002	1	BADGER METER INC	MDCRVendor466	2
ID	EVN0000002	1	Empire Pipe and Supply	jmathisEPS	2
ID	EVN0000002	1	MUELLER SYSTEMS LLC	MDCRVendor27060	2
ID	EVN0000002	1	SENSUS USA INC	MDCRVendor24950	2
ID	EVN0000002	1	test	test	2

7. Review the form submissions, then select the **Next in List** button.



Review Forms and Addendum

Business Unit: ID

Event ID: EVN0000002

Event Round: 1

Event Version: 2

Bidder Company Name: AVANTI COMPANY INC

Bidder User ID: MDCRVendor10685

Forms

Form	Form Acceptance Status	Form View Status
Bid Submittal Form	Complete	Viewed
Subcontracting Form	Complete	Viewed

Addendum

Addendum	Acknowledge Addendum	User Name	Acknowledgement Date
EVN0000002_Addendum_No.1.pdf	View Addendum File	MDCRVendor10685	07/06/2022

Please be aware that by typing your password acts as your electronic signature and binding as an original signature.

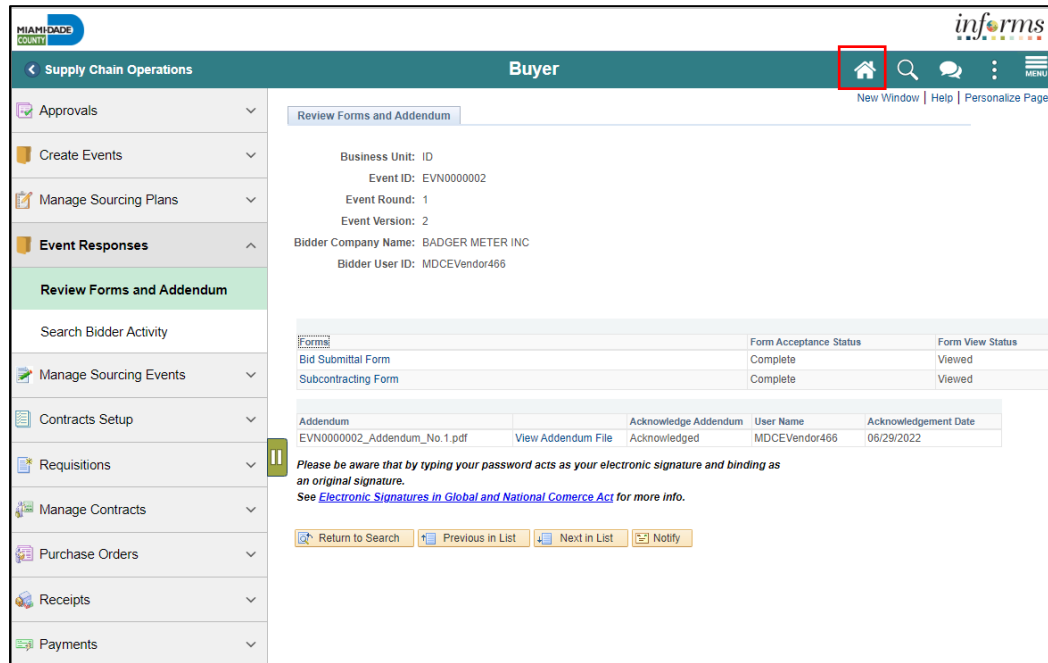
See [Electronic Signatures in Global and National Commerce Act](#) for more info.

[Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

Module 7: Analyzing an Event

Lesson 2: Review Forms and Addendum

8. Review the form submissions and continue until all bidder forms have been reviewed.



Buyer

Review Forms and Addendum

Business Unit: ID
Event ID: EVN0000002
Event Round: 1
Event Version: 2
Bidder Company Name: BADGER METER INC
Bidder User ID: MDCEVendor466

Forms	Form Acceptance Status	Form View Status
Bid Submittal Form	Complete	Viewed
Subcontracting Form	Complete	Viewed

Addendum	Acknowledge Addendum	User Name	Acknowledgement Date
EVN0000002_Addendum_No.1.pdf	View Addendum File	MDCEVendor466	06/29/2022

Please be aware that by typing your password acts as your electronic signature and binding as an original signature.
See [Electronic Signatures in Global and National Commerce Act](#) for more info.

[Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

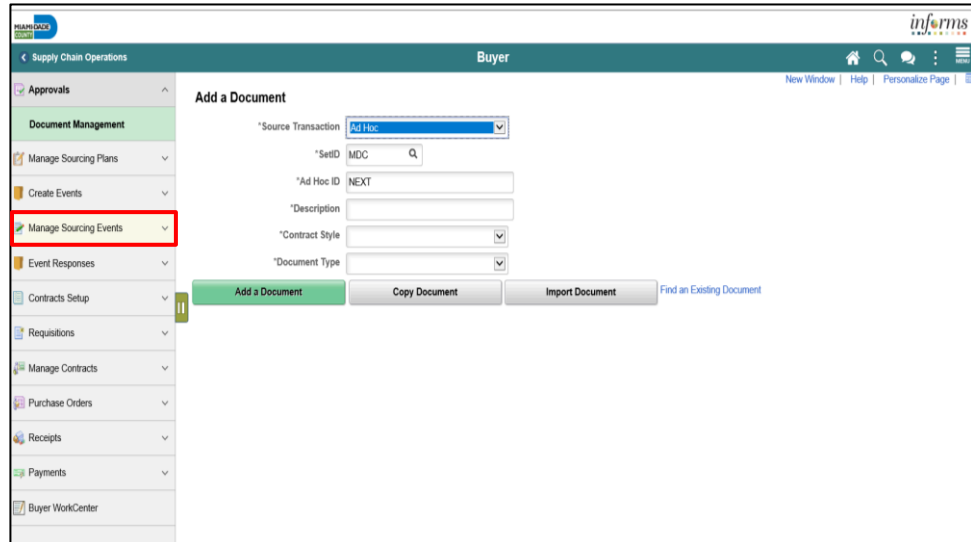
Module 7: Analyzing an Event

Lesson 3: Analyzing an Event by Aggregate

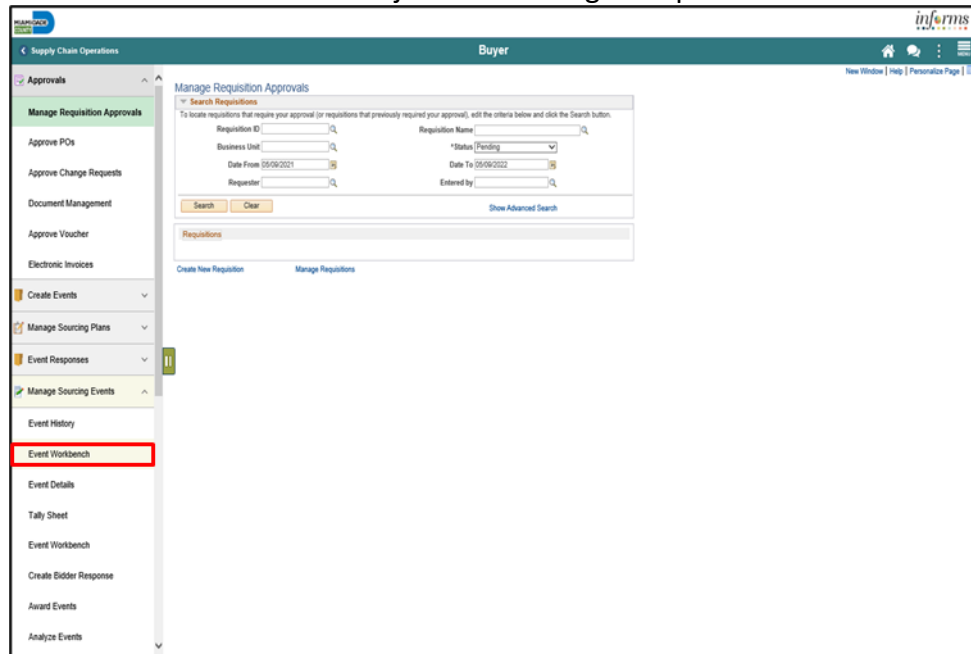
Utilizing the strategic sourcing module, Buyers can award events in multiple methods. Through this lesson, Buyers will be guided on how to review each bidder's bid for the totality of all the items (aggregate) in the advertised event.

Navigate to **Finance / Supply Chain (FSCM) > Supply Chain Operations > Buyer**

1. Select **Manage Sourcing Events** option in the navigation pane.



2. Select the **Event Workbench** object in the navigation pane.



Module 7: Analyzing an Event

Lesson 3: Analyzing an Event by Aggregate

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

Event Workbench

Search Criteria

Business Unit: ID [Q]

Event ID: [] From Start Date: [] To Start Date: [] Sort With: []

Created By: [Q] 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: [Q] Plan Name: [Q] **Search**

Default Search Preferences

Search Results 1-25 of 583 View 100

Event ID	Name	Format	Type	Unit	Status
0000000537	4-18-Test	Buy	RFx	ID	04/21/2024 08:37 PM EDT
0000000273	Test Form #2	Buy	RFx	AD	11/30/2022 02:11 PM
0000000272	TEST FORMS	Buy	RFx	AD	09/01/2022 08:50 PM EDT
0000000403	EXT-SS-230,236,237...	Buy	RFx	AU	09/30/2022 11:18 AM EDT
0000000537	XAL TEST	Buy	RFx	AU	09/01/2022 07:50 PM EDT
0000000613	WEB FORMS SAMPLE	Buy	RFx	ID	09/01/2022 01:43 PM EDT
0000000361	IN001101, IN01102...	Buy	RFx	AU	09/01/2022 01:43 PM EDT
0000000492	SS RFx Group - Rob...	Buy	RFx	ID	Open
0000000620	TEST	Buy	RFx	AD	Open
0000000614	IT	Buy	RFx	ID	Open
0000000600	TEST	Buy	RFx	CH	09/11/2022 01:43 PM EDT
0000000599	test	Buy	RFx	CH	09/11/2022 01:43 PM EDT
0000000601	Testing for Guide	RFI	RFx	ID	Open
0000000598	Testing for Guide	RFI	RFx	ID	09/11/2022 11:36 AM EDT
0000000597	TEST GR	Buy	RFx	ID	09/10/2022 07:26 PM EDT
0000000597	qa link check 2	Buy	RFx	ID	09/10/2022 07:26 PM EDT
0000000626	TALLY V (BID) RFx	Buy	RFx	IN	Event Completed

- Expand the **Legend** menu.

Event Workbench

Search Criteria

Business Unit: ID [Q]

Event ID: [] From Start Date: [] To Start Date: [] Sort With: []

Created By: [Q] 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: [Q] Plan Name: [Q] **Search**

Default Search Preferences

Legend

Search Results 1-25 of 41 View All

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-01057	Buy	RFx	ID	Pending Award
0000000197	RFI-01058	Buy	RFx	ID	Pending Award
0000000207	ITB with over 30 g...	Buy	RFx	ID	Pending Award
0000000219	RFQ9562-S20TPW	Buy	RFx	ID	Pending Award
0000000299	RFx - ITB with few...	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	TALLYSHEET LINES T...	Buy	RFx	ID	Pending Award
0000000476	TALLY SHEET LINES	Buy	RFx	IN	Pending Award

Module 7: Analyzing an Event

Lesson 3: Analyzing an Event by Aggregate

5. Select the **Analyze Bids** button.

The screenshot shows the 'Event Workbench' interface. On the left is a navigation menu with options like Approvals, Create Events, Manage Sourcing Plans, Event Responses, and Manage Sourcing Events. The main area has a 'Search Criteria' section with fields for Business Unit, Event ID, From Start Date, To Start Date, From End Date, To End Date, Event Format, Category, Event Type, Item ID, Event Status, Description, and Plan Name. There are also checkboxes for 'Only show Events I created', 'Only show Active Events', and 'Use my search defaults'. A 'Search' button and a 'Reset' button are present. Below the search criteria is a 'Search Results' table with columns: Event ID, Name, Format, Type, Unit, and Status. The table lists several events, including 'No Bid', 'test My Sourcing E...', 'FB-01097', 'RFP-01058', 'ITB with over 30 o...', 'RFQ952-52DTPW', 'RFX - ITB with new...', 'Invitation to Bid', 'Event to test awar...', 'RM Test4 Rfx', 'TALLY TEST 1', and 'TALLY TEST 2'.

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

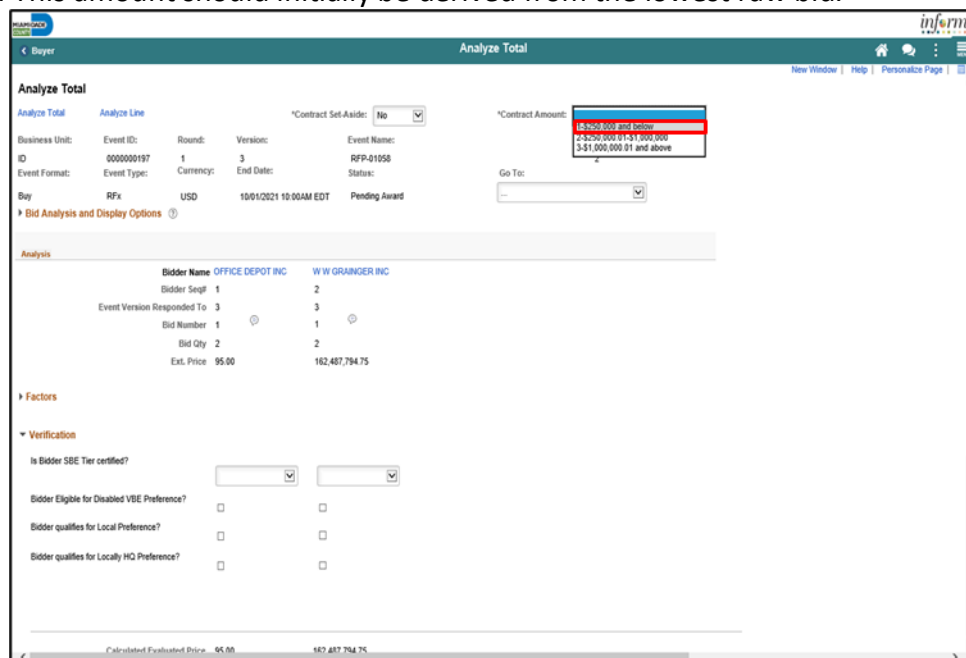
The screenshot shows the 'Analyze Total' interface. At the top, there's a 'Contract Set-Aside' drop-down menu with options 'Yes' and 'No'. Below this, there's a table with columns: Business Unit, Event ID, Round, Version, Event, ID, Event Format, Event Type, Currency, End Date, Status, and Go To. The table lists several events, including '0000000197', '0000000198', '0000000199', '0000000200', '0000000201', '0000000202', '0000000203', '0000000204', '0000000205', '0000000206', '0000000207', '0000000208', '0000000209', '0000000210', '0000000211', '0000000212', '0000000213', '0000000214', '0000000215', '0000000216', '0000000217', '0000000218', '0000000219', '0000000220', '0000000221', '0000000222', '0000000223', '0000000224', '0000000225', '0000000226', '0000000227', '0000000228', '0000000229', '0000000230', '0000000231', '0000000232', '0000000233', '0000000234', '0000000235', '0000000236', '0000000237', '0000000238', '0000000239', '0000000240', '0000000241', '0000000242', '0000000243', '0000000244', '0000000245', '0000000246', '0000000247', '0000000248', '0000000249', '0000000250'. Below the table, there's a 'Bid Analysis and Display Options' section. The 'Analysis' section shows details for 'OFFICE DEPOT INC' and 'W W GRANGER INC'. The 'Factors' section shows 'Verification' options. The 'Contract Set-Aside' drop-down is highlighted with a red box.

Module 7: Analyzing an Event

Lesson 3: Analyzing an Event by Aggregate

7. Select the applicable option from the **Contract Amount** drop-down.

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



Analyze Total

Business Unit: Event ID: Round: Version: Event Name: RFP-01058
 ID: 0000000197
 Event Format: Event Type: Currency: End Date: Status: Pending Award
 Bid: RFX USD 10/01/2021 10:00AM EDT

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

Go To: --

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
Ext. Price	95.00	162,487,794.75

Factors

Verification

Is Bidder SBE Tier certified? ☐ ☐

Bidder Eligible for Disabled VBE Preference? ☐ ☐

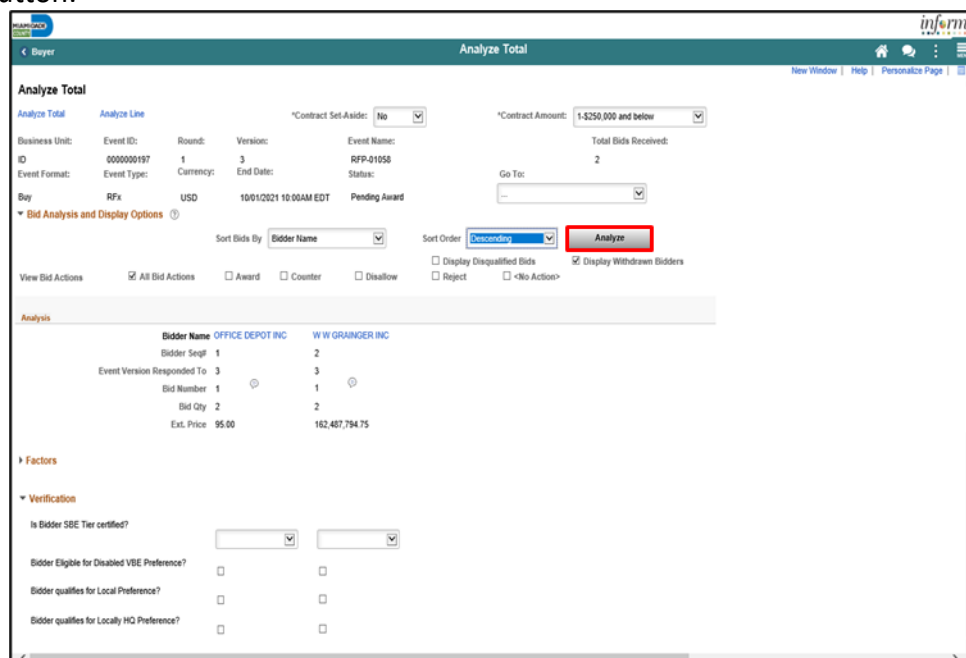
Bidder qualifies for Local Preference? ☐ ☐

Bidder qualifies for Locally HQ Preference? ☐ ☐

Calculated Evaluated Price: 95.00 162,487,794.75

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

8. Select the applicable **Sort Bids By** and **Sort Order** options. Then select the **Analyze** button.



Analyze Total

Business Unit: Event ID: Round: Version: Event Name: RFP-01058
 ID: 0000000197
 Event Format: Event Type: Currency: End Date: Status: Pending Award
 Bid: RFX USD 10/01/2021 10:00AM EDT

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

Go To: --

Bid Analysis and Display Options

Sort Bids By: Bidder Name Sort Order: Descending

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 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

Verification

Is Bidder SBE Tier certified? ☐ ☐

Bidder Eligible for Disabled VBE Preference? ☐ ☐

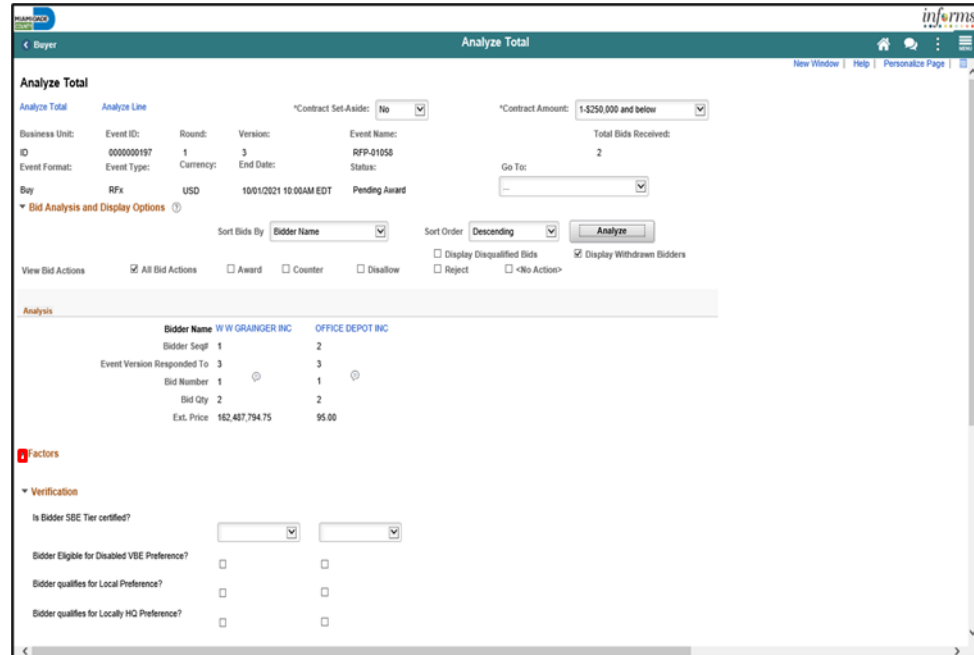
Bidder qualifies for Local Preference? ☐ ☐

Bidder qualifies for Locally HQ Preference? ☐ ☐

Module 7: Analyzing an Event

Lesson 3: Analyzing an Event by Aggregate

9. Select the Expand section **Factors** button.



Analyze Total

Business Unit: Event ID: Round: Version: Event Name: Total Bids Received: 2
 ID: 000000197 Event Type: Currency: End Date: RFP-01058 Status: Go To: --
 Buy RFX USD 10/1/2021 10:00AM EDT Pending Award

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>

Bidder Name	W W GRANGER INC	OFFICE DEPOT INC
Bidder Seq#	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

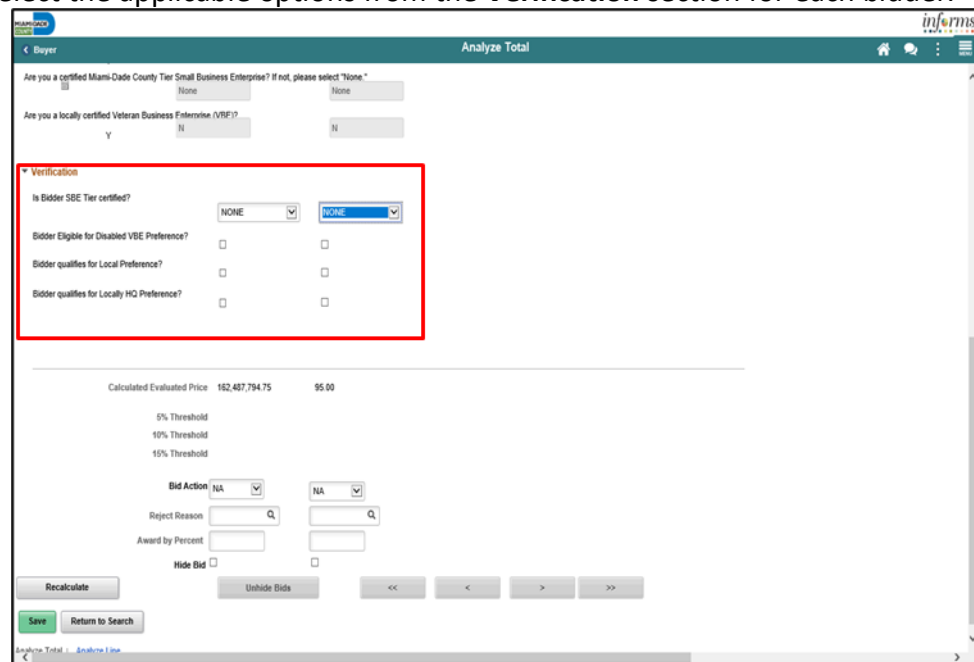
Is Bidder SBE Tier certified?

Bidder Eligible for Disabled VBE Preference? ☐ ☐

Bidder qualifies for Local Preference? ☐ ☐

Bidder qualifies for Locally HQ Preference? ☐ ☐

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



Analyze Total

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

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

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: 162,487,794.75 95.00

5% Threshold
10% Threshold
15% Threshold

Bid Action: NA NA

Reject Reason:

Award by Percent:

Hide Bid: ☐ ☐

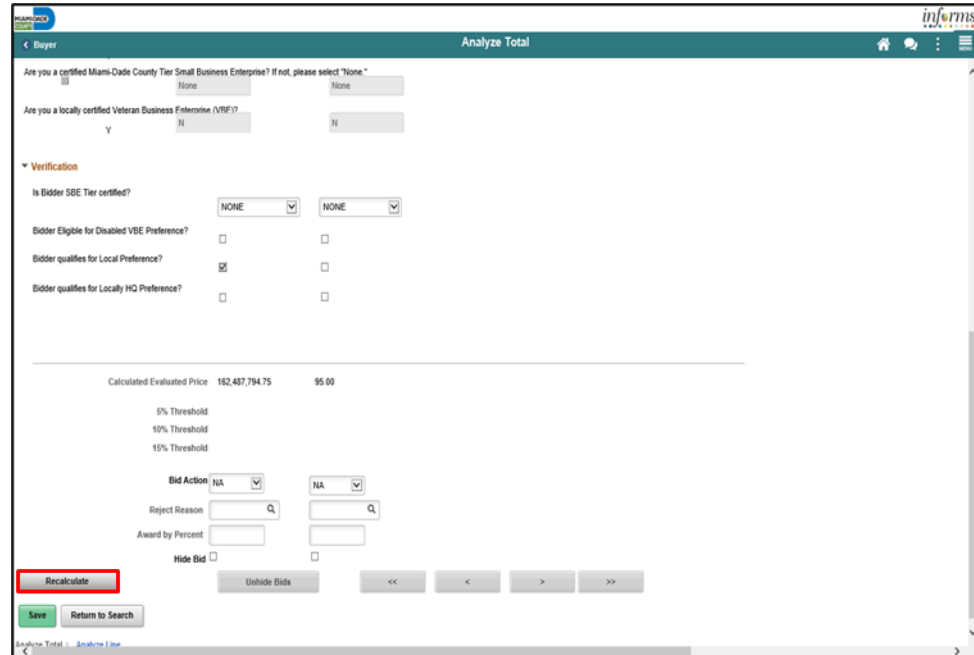
Recalculate Unhide Bids << < > >>

Save Return to Search

Module 7: Analyzing an Event

Lesson 3: Analyzing an Event by Aggregate

11. Select the **Recalculate** button.



The screenshot shows the 'Analyze Total' form in the informs system. The form includes sections for user verification, bidder eligibility, and calculated thresholds. The 'Recalculate' button is highlighted with a red box.

Verification

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

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

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 162,487,794.75 95.00

5% Threshold
10% Threshold
15% Threshold

Bid Action

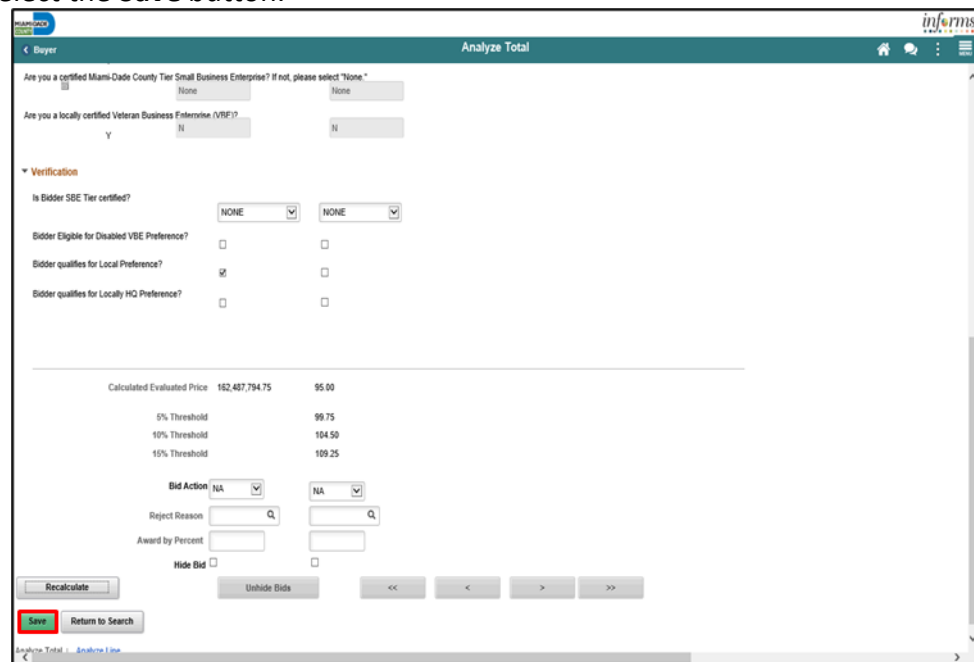
Reject Reason

Award by Percent

Hide Bid ☐

Recalculate

12. Select the **Save** button.



The screenshot shows the 'Analyze Total' form in the informs system. The 'Save' button is highlighted with a red box.

Verification

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

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

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 162,487,794.75 95.00

5% Threshold 99.75
10% Threshold 104.50
15% Threshold 109.25

Bid Action

Reject Reason

Award by Percent

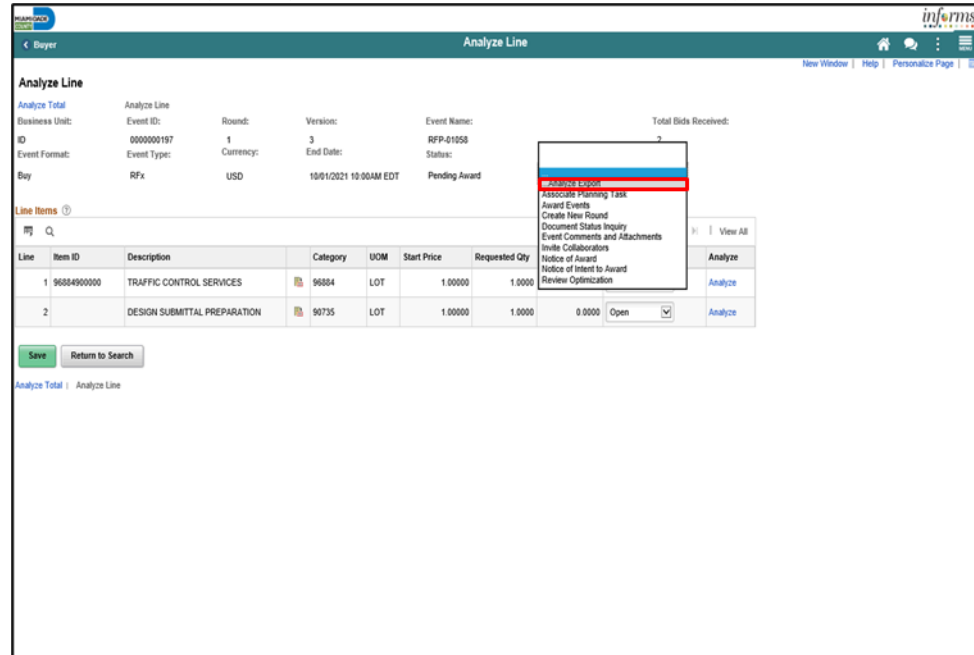
Hide Bid ☐

Save

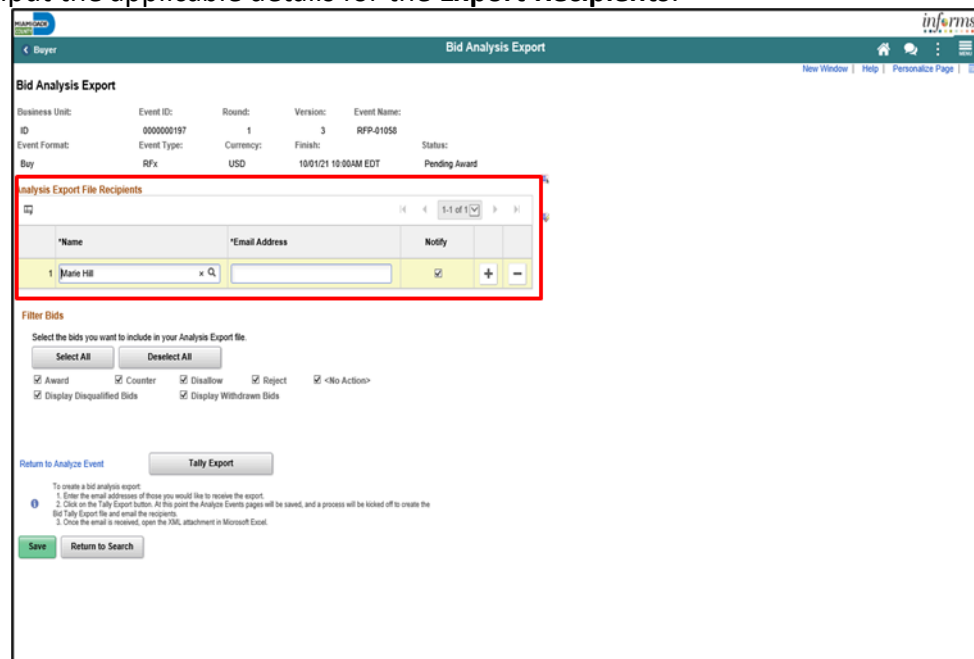
Module 7: Analyzing an Event

Lesson 3: Analyzing an Event by Aggregate

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



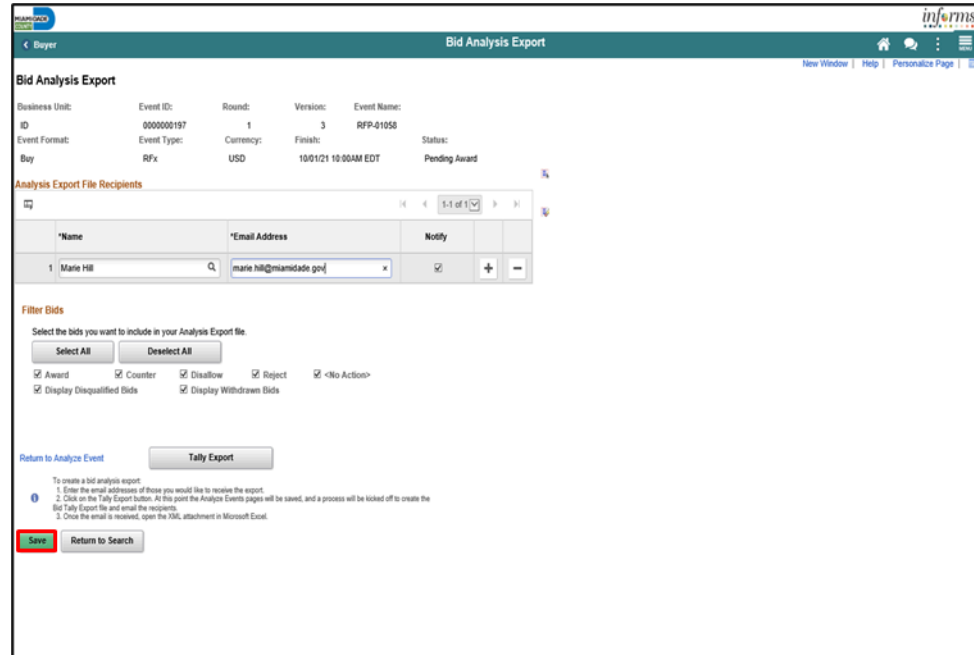
14. Input the applicable details for the **Export Recipients**.



Module 7: Analyzing an Event

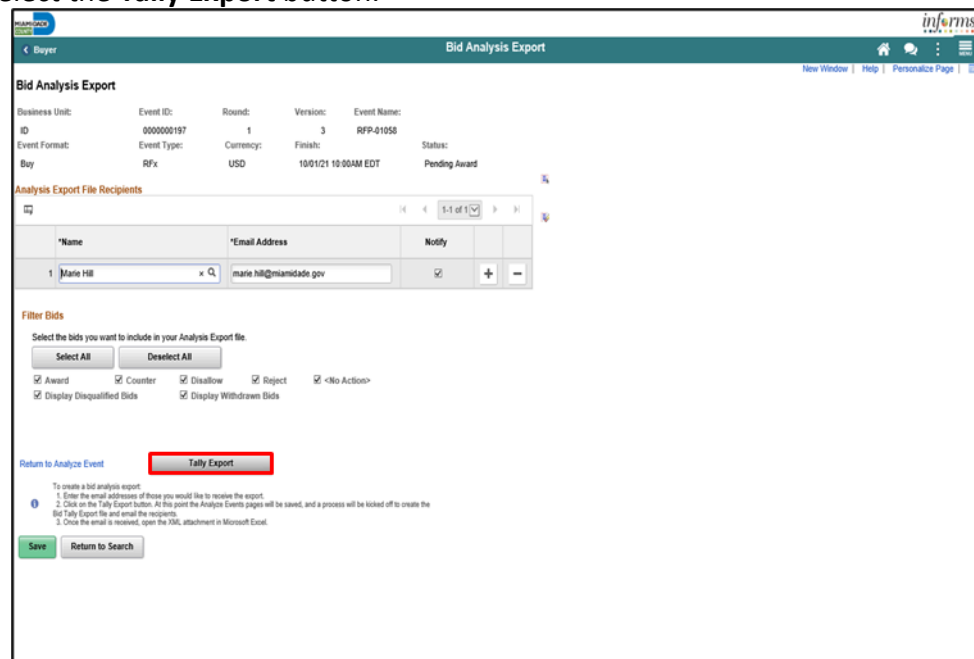
Lesson 3: Analyzing an Event by Aggregate

15. Select the **Save** button.



The screenshot shows the 'Bid Analysis Export' page in the informs system. The page includes a header with the user's name 'Buyer' and the page title 'Bid Analysis Export'. Below the header, there is a section for 'Business Unit' and 'Event ID' with fields for 'ID', 'Event Format', 'Buy', 'Event ID', 'Event Type', 'Round', 'Currency', 'Version', 'Finish', 'Event Name', and 'Status'. The 'Analysis Export File Recipients' section contains a table with columns for 'Name', 'Email Address', and 'Notify'. The 'Filter Bids' section has buttons for 'Select All' and 'Deselect All', and checkboxes for 'Award', 'Counter', 'Disallow', 'Reject', '<No Action>', 'Display Disqualified Bids', and 'Display Withdrawn Bids'. At the bottom, there are buttons for 'Return to Analyze Event', 'Tally Export', 'Save', and 'Return to Search'. The 'Save' button is highlighted with a red box.

16. Select the **Tally Export** button.

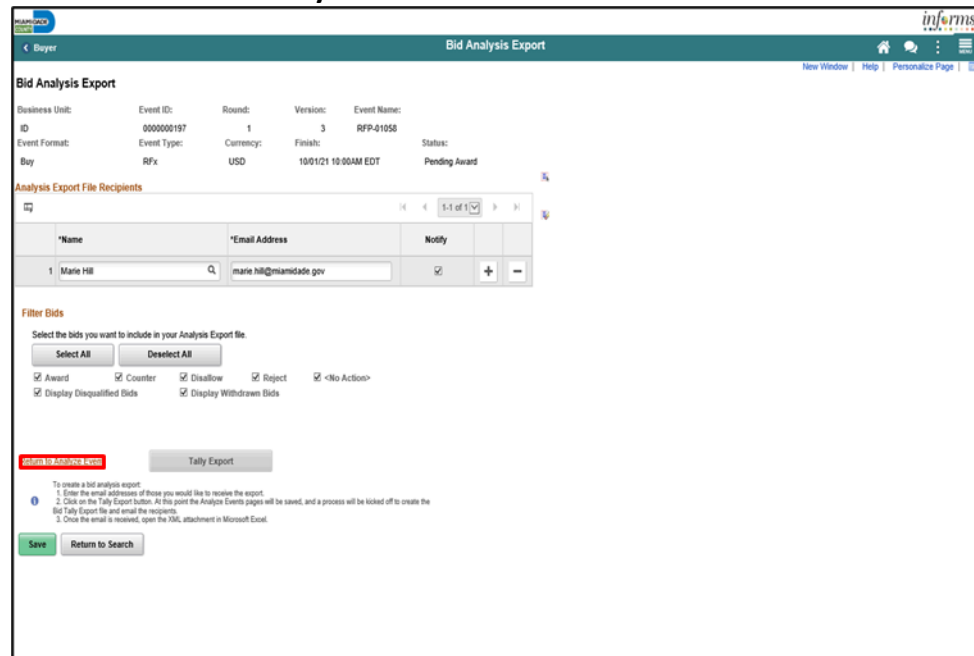


This screenshot is identical to the one above, showing the 'Bid Analysis Export' page. In this view, the 'Tally Export' button is highlighted with a red box, indicating the next step in the process.

Module 7: Analyzing an Event

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

Lesson 3: Analyzing an Event by Aggregate



Bid Analysis Export

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

Analysis Export File Recipients

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

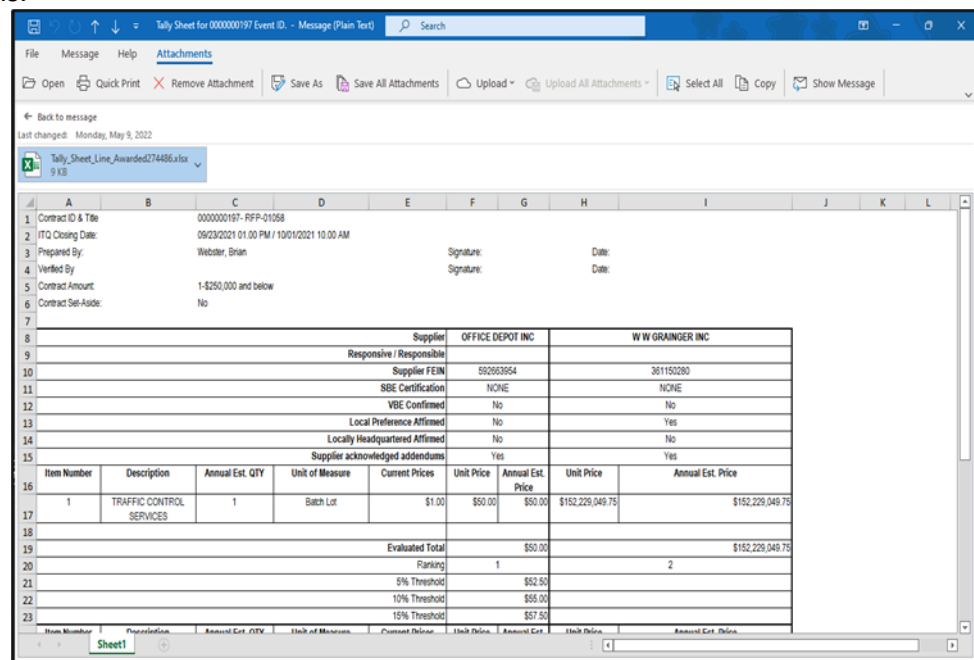
Filter Bids

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. As the user 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 XLS attachment in Microsoft Excel.

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



Tally Sheet for 000000197 Event ID: - Message (Plain Text)

File Message Help Attachments

Open Quick Print Remove Attachment Save As Save All Attachments Upload Upload All Attachments Select All Copy Show Message

Back to message

Last changed: Monday, May 9, 2022

Tally_Sheet_Line_Awarded274486.xlsx 9 KB

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			

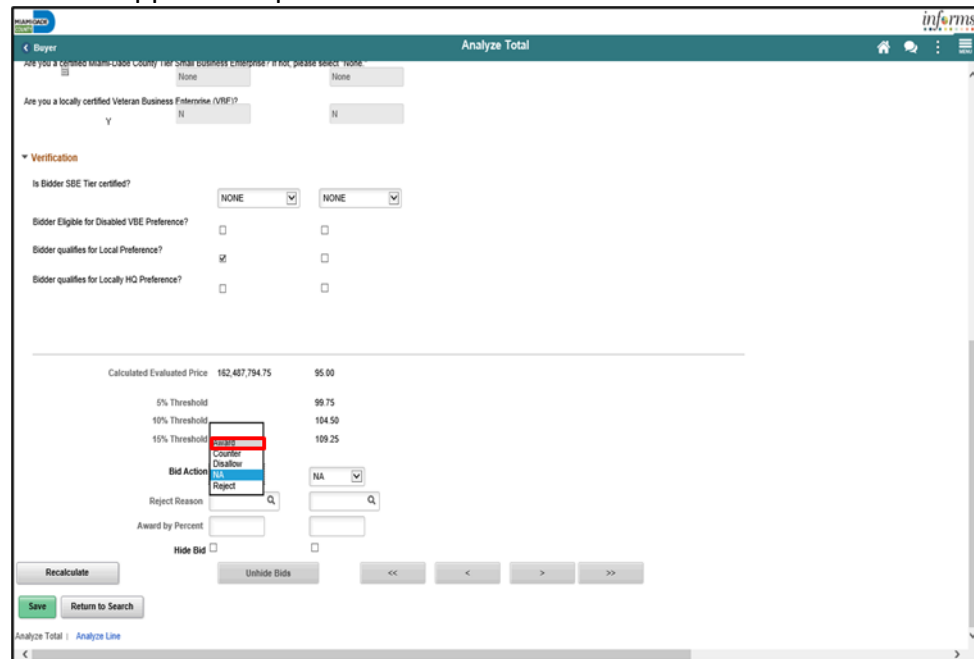
Supplier: OFFICE DEPOT INC
 Supplier FEIN: 592953954
 SBE Certification: NONE
 VBE Confirmed: No
 Local Preference Affirmed: No
 Locally Headquartered Affirmed: No
 Supplier acknowledged addendums: Yes

Supplier: W W GRANGER INC
 Supplier FEIN: 381150280
 SBE Certification: NONE
 VBE Confirmed: No
 Local Preference Affirmed: Yes
 Locally Headquartered Affirmed: No
 Supplier acknowledged addendums: Yes

Module 7: Analyzing an Event

Lesson 3: Analyzing an Event by Aggregate

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



Analyze Total

Are you a Certified Minority-Owned Company Tier One 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 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 Counter Disallow Reject

Reject Reason

Award by Percent

Hide Bid ☐

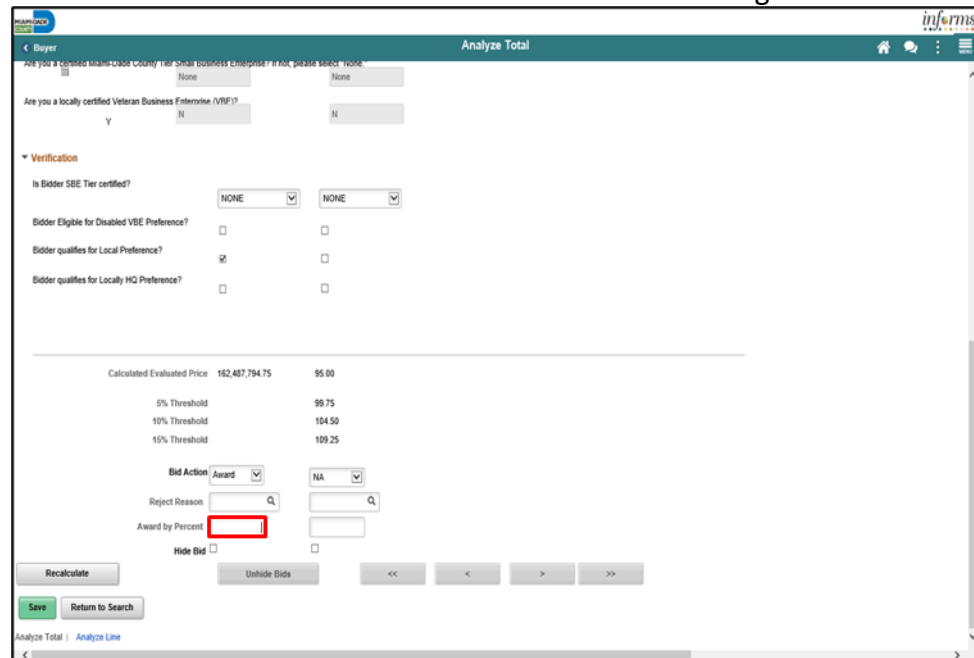
Unhide Bids << < > >>

Recalculate Save Return to Search

Analyze Total | Analyze Line

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

Note: Selecting 100 percent is part of the analysis of the bids and will not award the contract. Refer to Module 8 for information on awarding events.



Analyze Total

Are you a Certified Minority-Owned Company Tier One 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 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 Counter Disallow Reject

Reject Reason

Award by Percent 100

Hide Bid ☐

Unhide Bids << < > >>

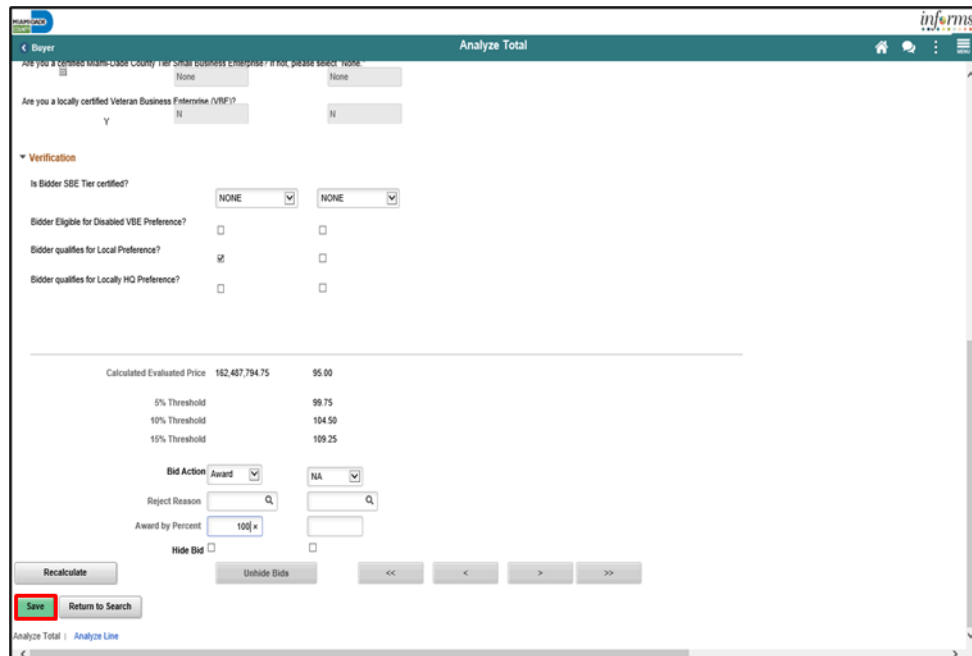
Recalculate Save Return to Search

Analyze Total | Analyze Line

Module 7: Analyzing an Event

Lesson 3: Analyzing an Event by Aggregate

20. Select the **Save** button.



Analyze Total

Are you a certified Minority-Owned/Controlled 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 NONE

Bidder Eligible for Disabled VBE Preference?
☐

Bidder qualifies for Local Preference?
☒

Bidder qualifies for Locally HQ Preference?
☐

Calculated Evaluated Price 162,427,794.75 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 ☐

Unhide Bids

Recalculate

Save Return to Search

Analyze Total | Analyze Line

Module 7: Analyzing an Event

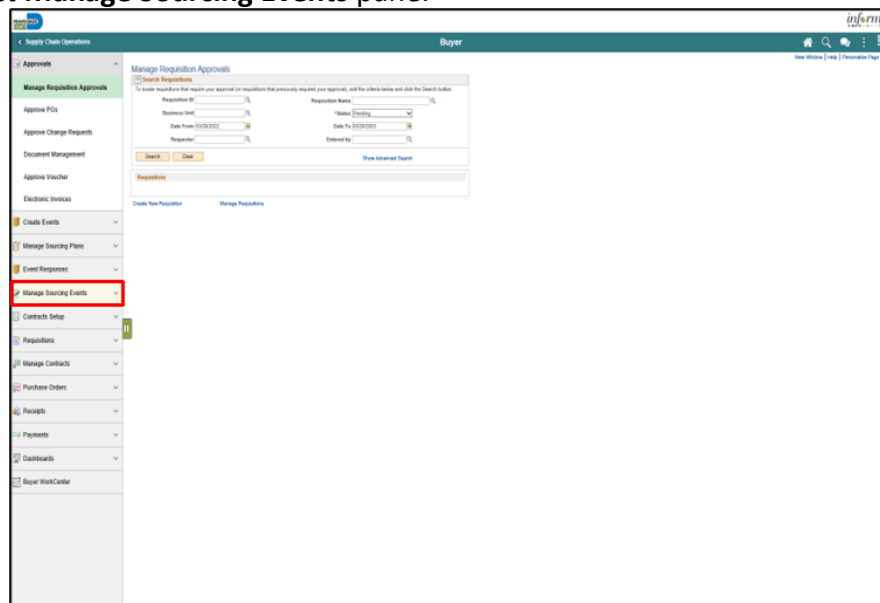
Lesson 4: Analyzing an Event by Line

Utilizing the strategic sourcing module, Buyers can award events in multiple methods. Through this lesson, Buyers will be guided on how to review each bidder's bid for the lowest, responsive, responsible bidder per line. The analyze event by line will allow bidders to award multiple bidders.

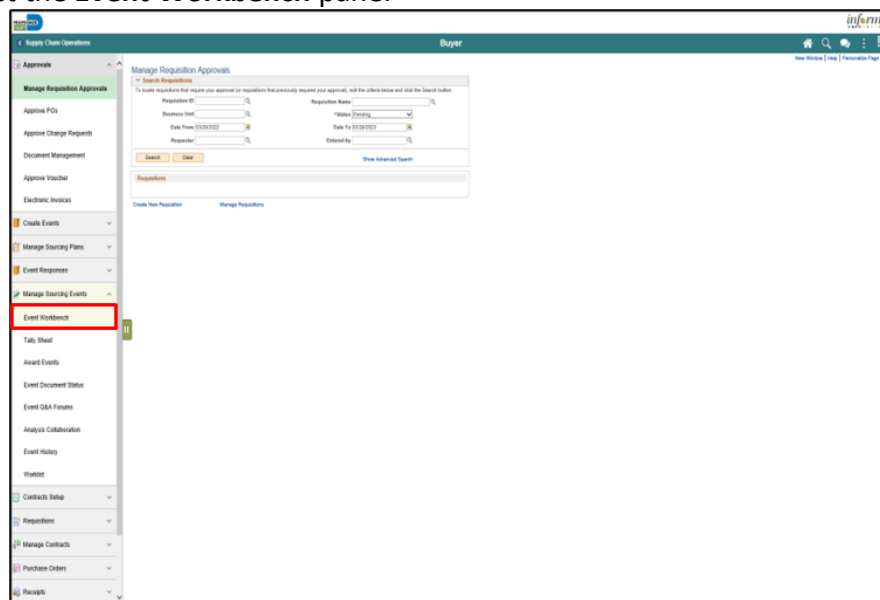
If the event lines do not require a bid for each line, Bidders can choose to place a “No Bid” on lines they do not wish to bid on. Contrary though, if the Buyer chooses to mark all lines of an event mandatory, Bidders must place a bid in order to be considered for award.

Navigate to: **Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer**

1. Select **Manage Sourcing Events** pane.



2. Select the **Event Workbench** pane.



Module 7: Analyzing an Event

Lesson 4: Analyzing an Event by Line

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

Event ID	Name	Format	Type	Unit	Status
1000000000	1000000000	RFx	TP	TP	Open
1000000000	1000000000	RFx	TP	TP	Open
1000000000	1000000000	RFx	TP	TP	Open
1000000000	1000000000	RFx	TP	TP	Open
1000000000	1000000000	RFx	TP	TP	Open
1000000000	1000000000	RFx	TP	TP	Open
1000000000	1000000000	RFx	TP	TP	Open
1000000000	1000000000	RFx	TP	TP	Open
1000000000	1000000000	RFx	TP	TP	Open
1000000000	1000000000	RFx	TP	TP	Open

- Select the **Analyze Bids** button.

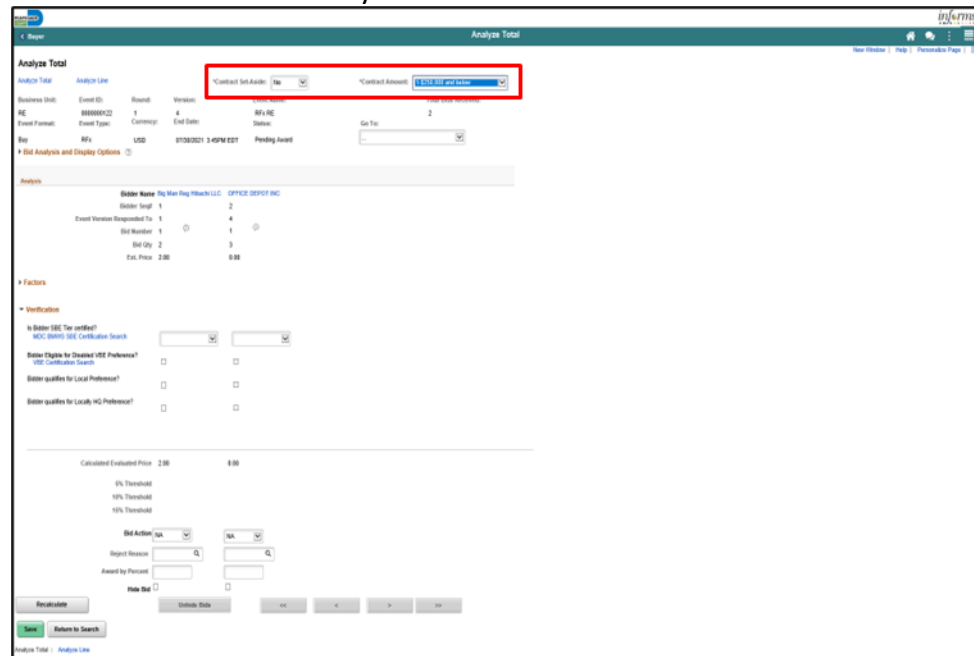
Event ID	Name	Format	Type	Unit	Status
1000000000	1000000000	RFx	TP	TP	Pending Award
1000000000	1000000000	RFx	TP	TP	Pending Award
1000000000	1000000000	RFx	TP	TP	Pending Award
1000000000	1000000000	RFx	TP	TP	Pending Award
1000000000	1000000000	RFx	TP	TP	Pending Award
1000000000	1000000000	RFx	TP	TP	Pending Award
1000000000	1000000000	RFx	TP	TP	Pending Award
1000000000	1000000000	RFx	TP	TP	Pending Award
1000000000	1000000000	RFx	TP	TP	Pending Award
1000000000	1000000000	RFx	TP	TP	Pending Award

Module 7: Analyzing an Event

Lesson 4: Analyzing an Event by Line

- 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.



Analyze Total

Contract Set-Aside: Contract Amount:

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

Event Format: Event Type: End Date: Status:

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

Bid Analysis and Display Options

Analysis

Bidder Name	Bidder Seq#	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? ☐ ☐

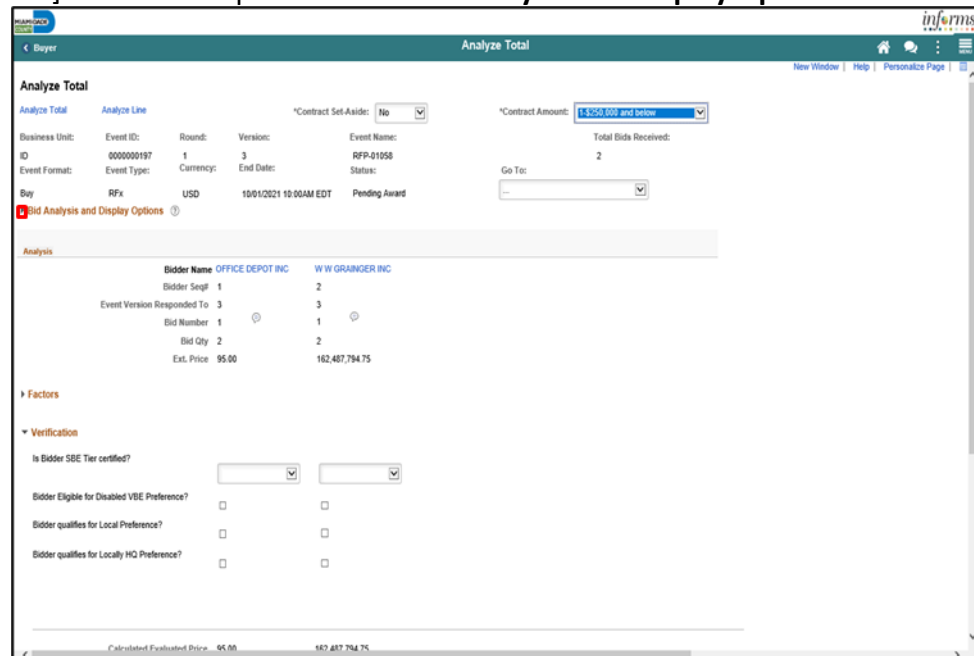
Bidder qualifies for Local Preference? ☐ ☐

Bidder qualifies for Locally HQ Preference? ☐ ☐

Calculated Evaluated Price: 95.00 162,487,794.75

Buttons:

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



Analyze Total

Contract Set-Aside: Contract Amount:

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

Event Format: Event Type: End Date: Status:

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

Bid Analysis and Display Options

Analysis

Bidder Name	Bidder Seq#	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? ☐ ☐

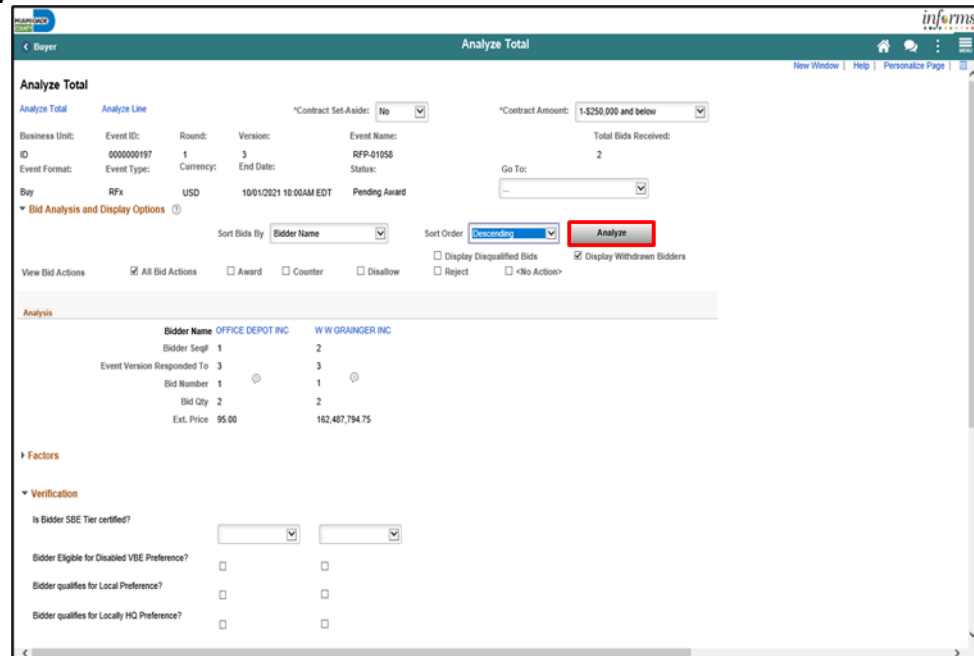
Bidder qualifies for Locally HQ Preference? ☐ ☐

Calculated Evaluated Price: 95.00 162,487,794.75

Module 7: Analyzing an Event

Lesson 4: Analyzing an Event by Line

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



Analyze Total

Business Unit: Event ID: Round: Version: Event Name: Total Bids Received: 2
 ID: 000000197 Event Type: 1 Currency: End Date: RFP-01050 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

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 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

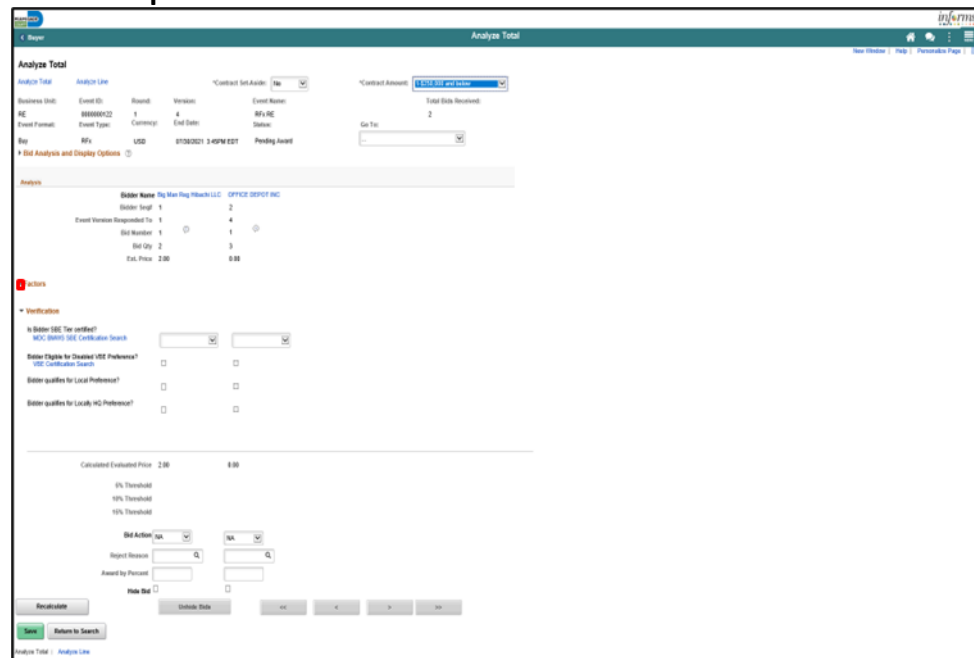
Is Bidder SBE Tier certified?

Bidder Eligible for Disabled VBE Preference? ☐ ☐

Bidder qualifies for Local Preference? ☐ ☐

Bidder qualifies for Locally HQ Preference? ☐ ☐

6. Select the **Expand section Factors** button.



Analyze Total

Business Unit: Event ID: Round: Version: Event Name: Total Bids Received: 2
 RE 000000222 Event Type: 1 Currency: End Date: RFX RE Status: Go To: --
 Buy RFX USD 07/08/2021 3:40PM EDT Pending Award

*Contract Set Aside: No *Contract Amount: \$1,524,000 and below

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	Big Man Reg Hardware 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

6% Threshold 10% Threshold 10% Threshold

Bid Action: NA NA

Reject Reason:

Award by Percent:

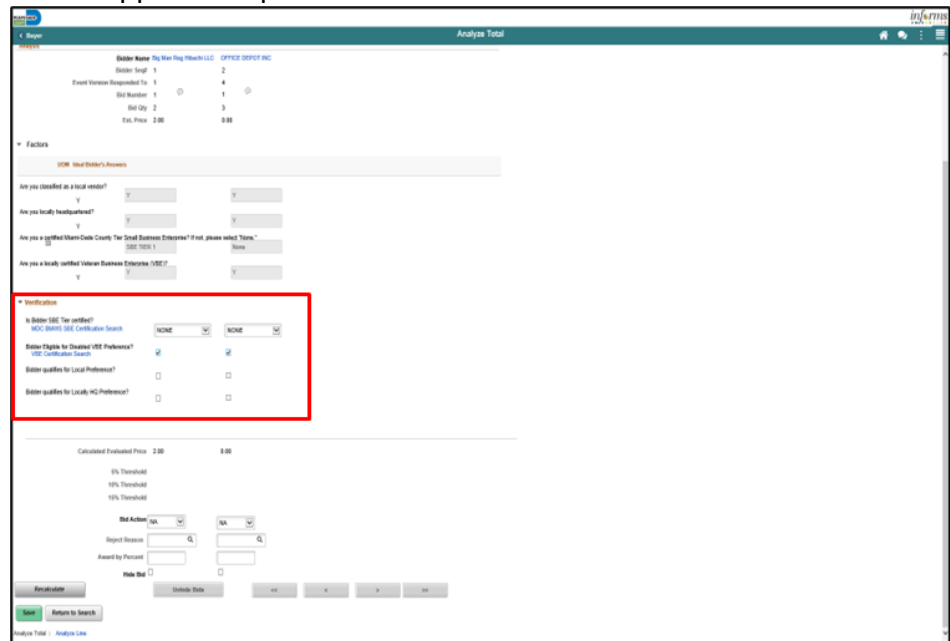
View Bid: ☐ ☐

Buttons: Recalculate, Save, Return to Search, Analyze Total, Analyze Line

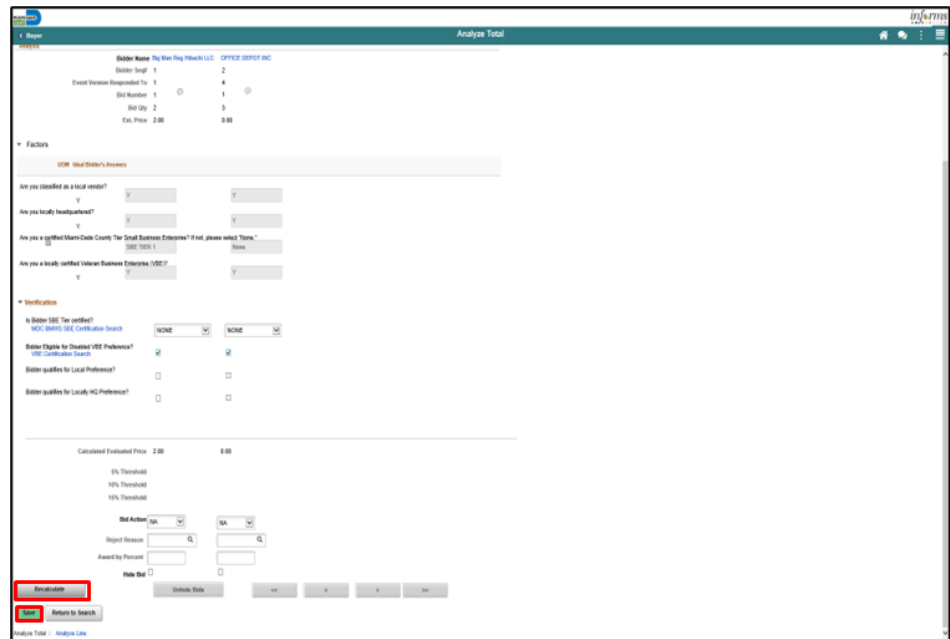
Module 7: Analyzing an Event

Lesson 4: Analyzing an Event by Line

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



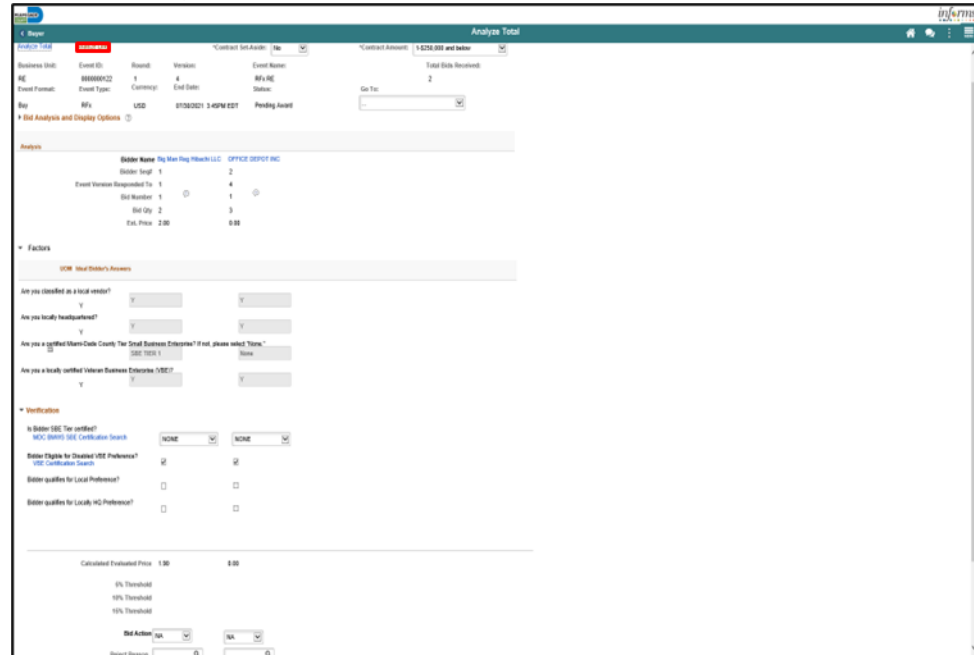
8. Select the **Recalculate** button for each line.
9. Select the **Save** button.



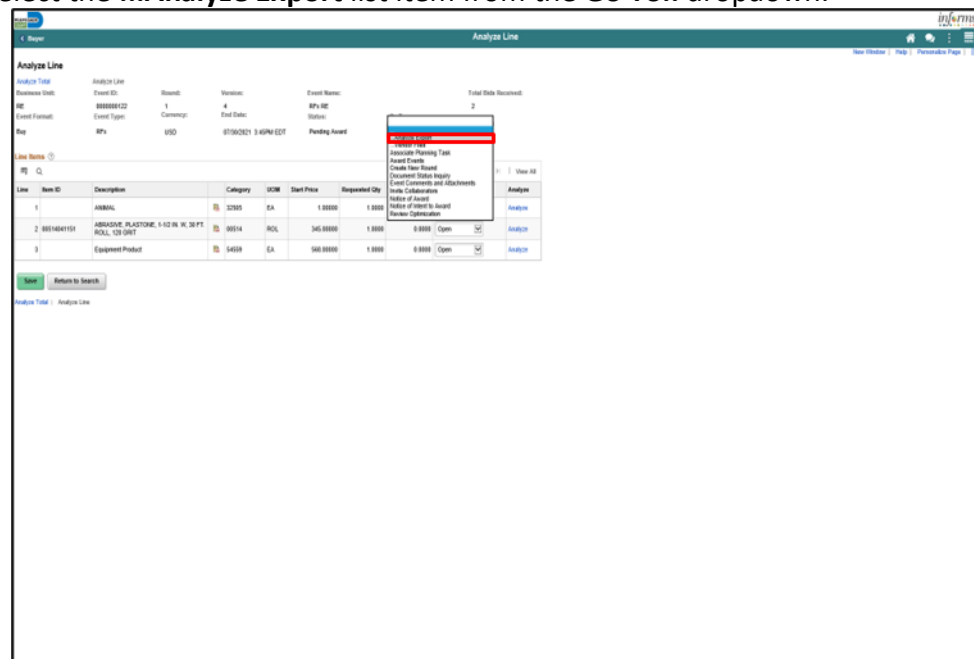
Module 7: Analyzing an Event

Lesson 4: Analyzing an Event by Line

10. Select the **Analyze Line** link.



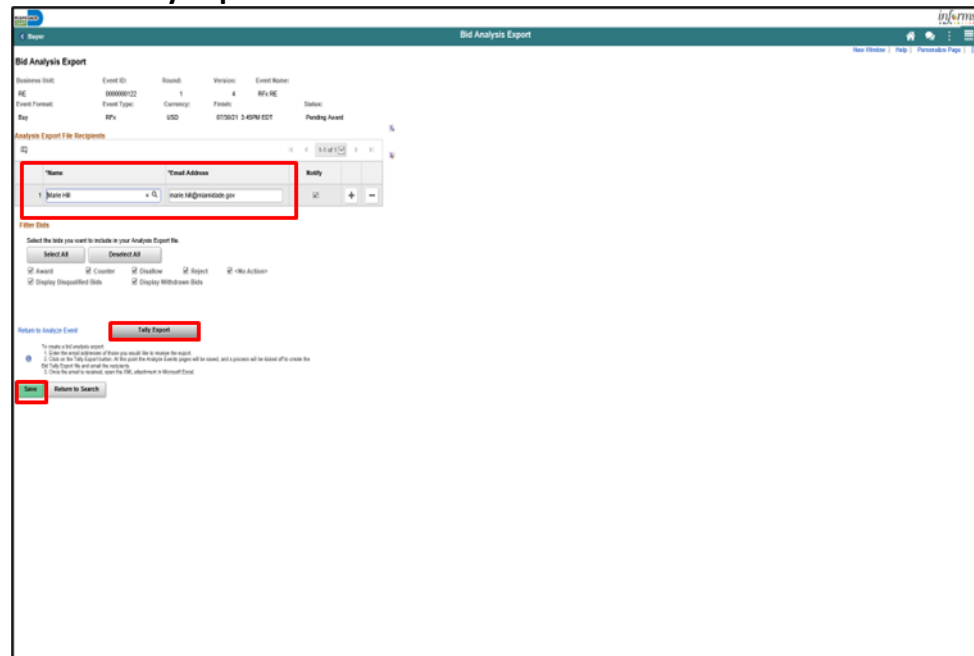
11. Select the **...Analyze Export** list item from the **Go To..** dropdown.



Module 7: Analyzing an Event

Lesson 4: Analyzing an Event by Line

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



Bid Analysis Export

Event ID: 000000122 | Version: 1 | 4 | RFx RE | Status: Pending Award

Event Format: RFx | Currency: USD | DTG: 07/05/21 3:45PM EDT

Analysis Export File Recipients

ID	Name	Email Address	Notify
1	State HR	state.hr@comcast.net	<input checked="" type="checkbox"/>

Filter Data

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

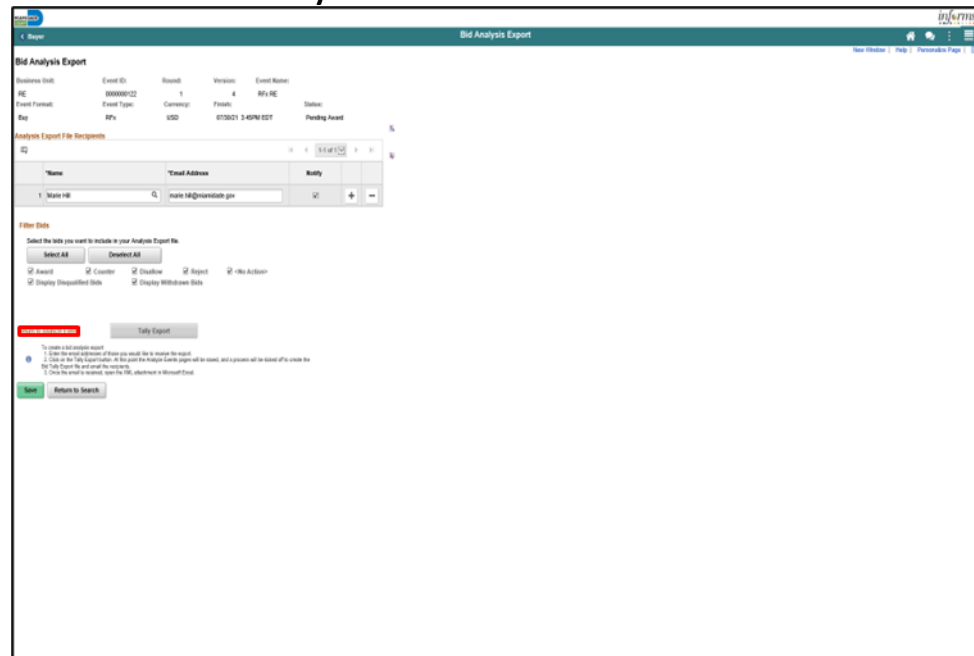
☒ Award ☒ Counter ☒ Disallow ☒ Export ☒ No Action

☒ Display Unqualified Data ☒ Display Withdrawn Data

Return to Analyze Event **Tally Export**

Save **Return to Search**

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



Bid Analysis Export

Event ID: 000000122 | Version: 1 | 4 | RFx RE | Status: Pending Award

Event Format: RFx | Currency: USD | DTG: 07/05/21 3:45PM EDT

Analysis Export File Recipients

ID	Name	Email Address	Notify
1	State HR	state.hr@comcast.net	<input checked="" type="checkbox"/>

Filter Data

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

☒ Award ☒ Counter ☒ Disallow ☒ Export ☒ No Action

☒ Display Unqualified Data ☒ Display Withdrawn Data

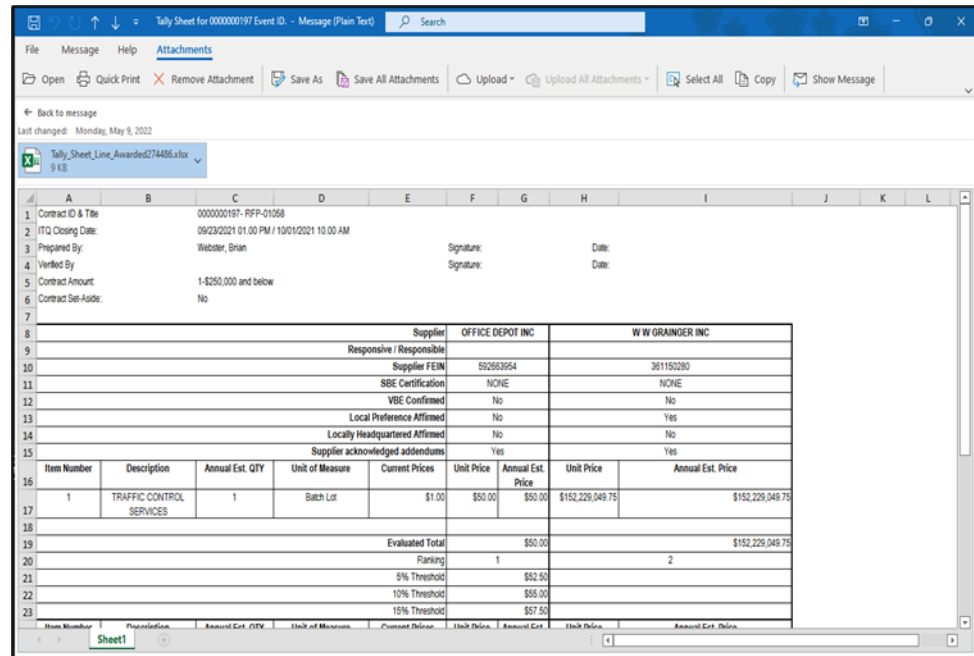
Return to Analyze Event **Tally Export**

Save **Return to Search**

Module 7: Analyzing an Event

Lesson 4: Analyzing an Event by Line

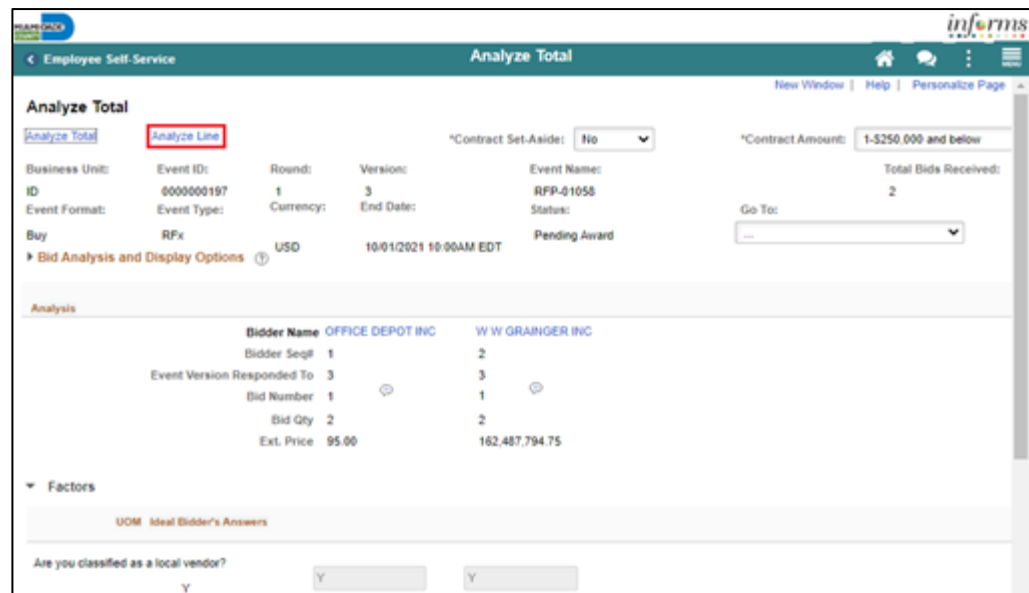
An email will be sent to the recipient containing an Excel spreadsheet with the bid details.



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						\$62.50		
10% Threshold						\$65.00		
15% Threshold						\$67.50		

16. Select the **Analyze Line** link.

Note: This action is to itemize the award by line after completing the export tally sheet.



Analyze Total

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

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

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

Event Format: Event Type: Currency: USD End Date: 10/01/2021 10:00AM EDT Status: Pending Award

Go To: [Dropdown]

Bid Analysis and Display Options

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

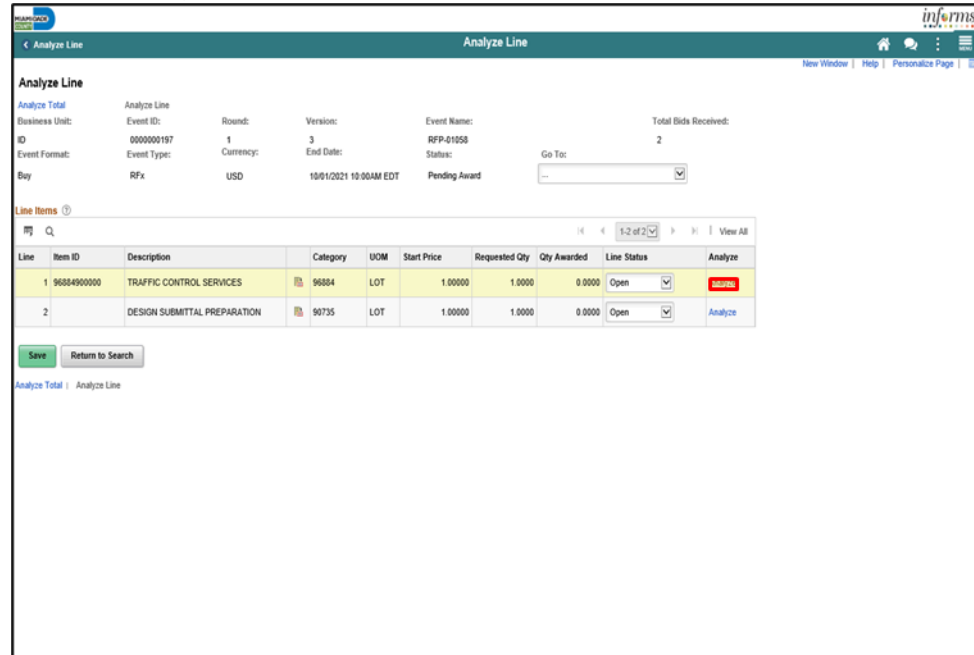
UOM: Ideal Bidder's Answers

Are you classified as a local vendor? Y ☐ Y ☐ Y ☐

Module 7: Analyzing an Event

Lesson 4: Analyzing an Event by Line

17. Select the **Analyze** link.



Analyze Line

Business Unit: Event ID: Round: Version: Event Name: Total Bids Received:
 ID: 000000197 Event Type: 1 Currency: 3 End Date: RFP-0155 Status: 2
 Buy RFx USD 10/01/2021 10:00AM EDT Pending Award Go To: [dropdown]

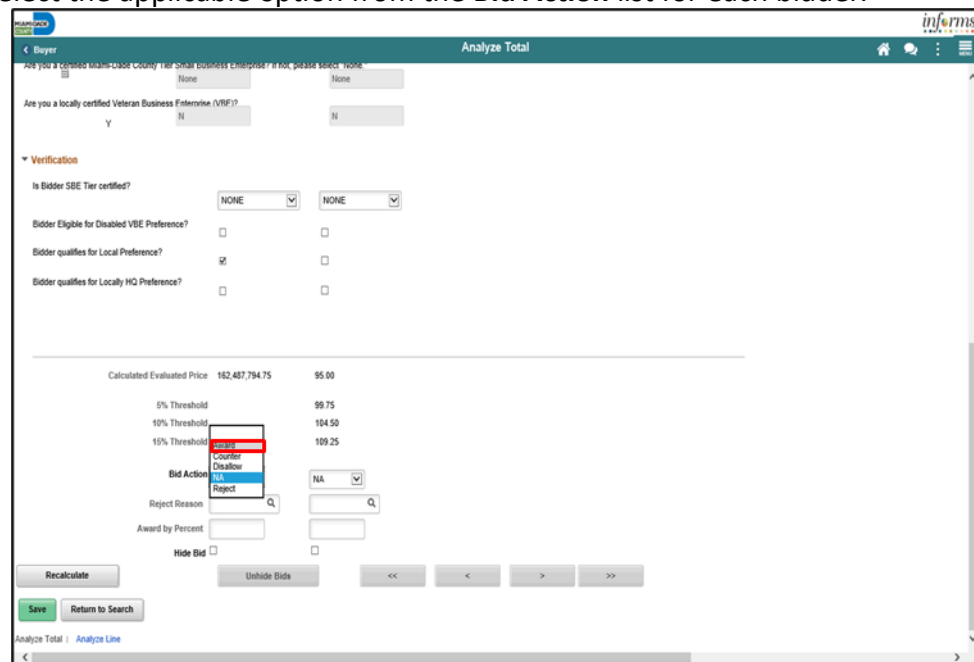
Line Items

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Line Status	Analyze
1	960490000	TRAFFIC CONTROL SERVICES	96004	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

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



Analyze Total

Are you a certified Minority Business Enterprise (MBE)? None
 Are you a locally certified Veteran Business Enterprise (VBE)? None
 Are you a locally certified Veteran Business Enterprise (VBE)? Y 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
 Bid Action: [dropdown menu with options: NA, Reject, Counter Disposal]
 Reject Reason: [text input]
 Award by Percent: [text input]
 Hide Bid: ☐

Recalculate Unhide Bids << < > >>

Save Return to Search

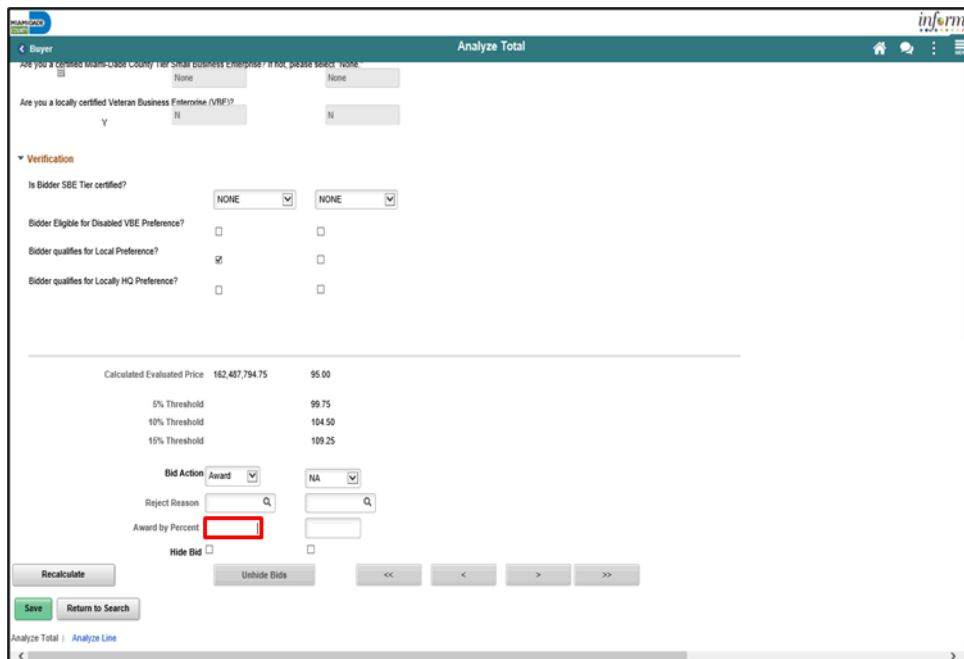
Analyze Total | Analyze Line

Module 7: Analyzing an Event

Lesson 4: Analyzing an Event by Line

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

Note: Selecting 100 percent is part of the analysis of the bids and will not award the contract. Refer to Module 8 for information on awarding events.



Analyze Total

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

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

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: 162,487,794.75

5% Threshold: 99.75

10% Threshold: 104.50

15% Threshold: 109.25

Bid Action: Award

Reject Reason:

Award by Percent: 100

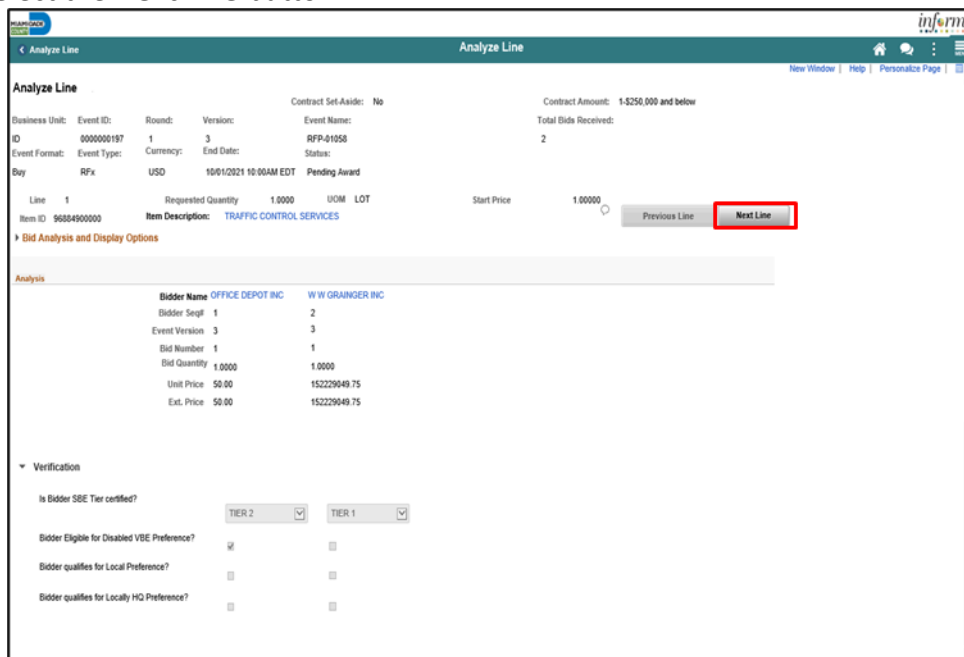
Hide Bid

Recalculate

Save

Return to Search

20. Select the **Next Line** button.



Analyze Line

Business Unit: 0000000197

Event ID: 1

Round: 3

Version: RFP-01058

Event Name: RFP-01058

Contract Set-Aside: No

Contract Amount: 1-\$250,000 and below

Total Bids Received: 2

Event Format: RFP

Event Type: USD

Currency: 10/01/2021 10:06AM EDT

Status: Pending Award

Day: 1

Requested Quantity: 1,000

UOM: LOT

Start Price: 1.00000

Item ID: 9688490000

Item Description: TRAFFIC CONTROL SERVICES

Previous Line

Next Line

Bid Analysis and Display Options

Analysis

Bidder Name	OFFICE DEPOT INC	W W GRAINGER INC
Bidder Seg#	1	2
Event Version	3	3
Bid Number	1	1
Bid Quantity	1,000	1,000
Unit Price	50.00	152229049.75
Ext. Price	50.00	152229049.75

Verification

Is Bidder SBE Tier certified?

Bidder Eligible for Disabled VBE Preference?

Bidder qualifies for Local Preference?

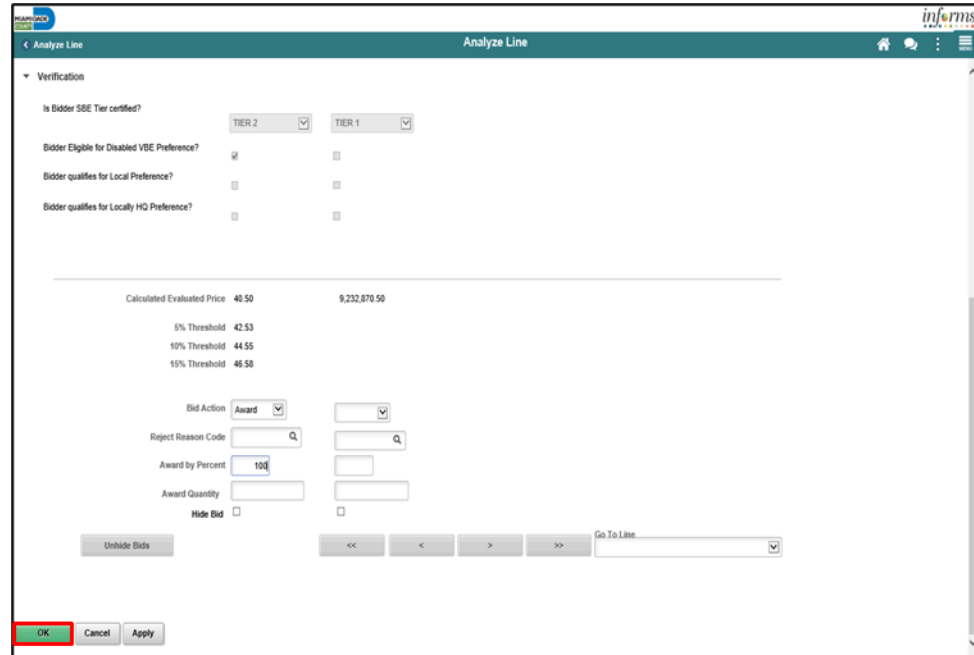
Bidder qualifies for Locally HQ Preference?

Note: Repeat steps 17-21 for each line.

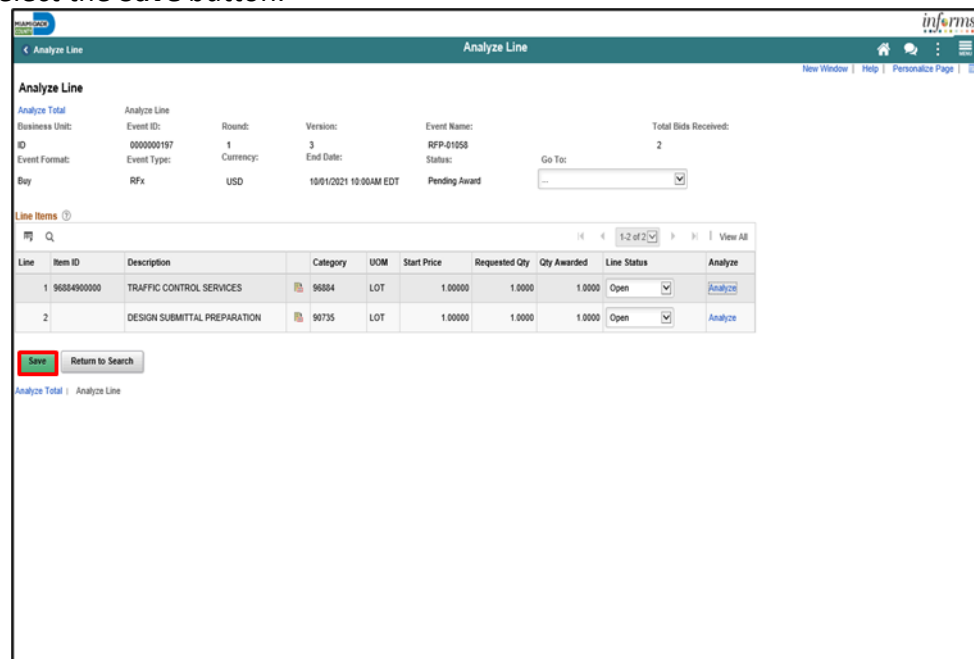
Module 7: Analyzing an Event

Lesson 4: Analyzing an Event by Line

21. Select the **OK** button.



22. Select the **Save** button.

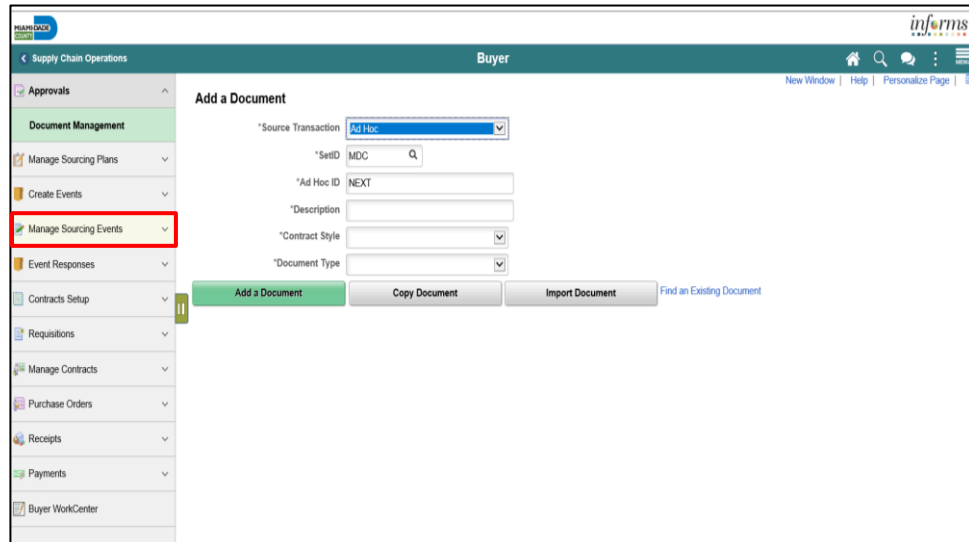


Module 7: Analyzing an Event

Lesson 5: Analyzing an Event by Group

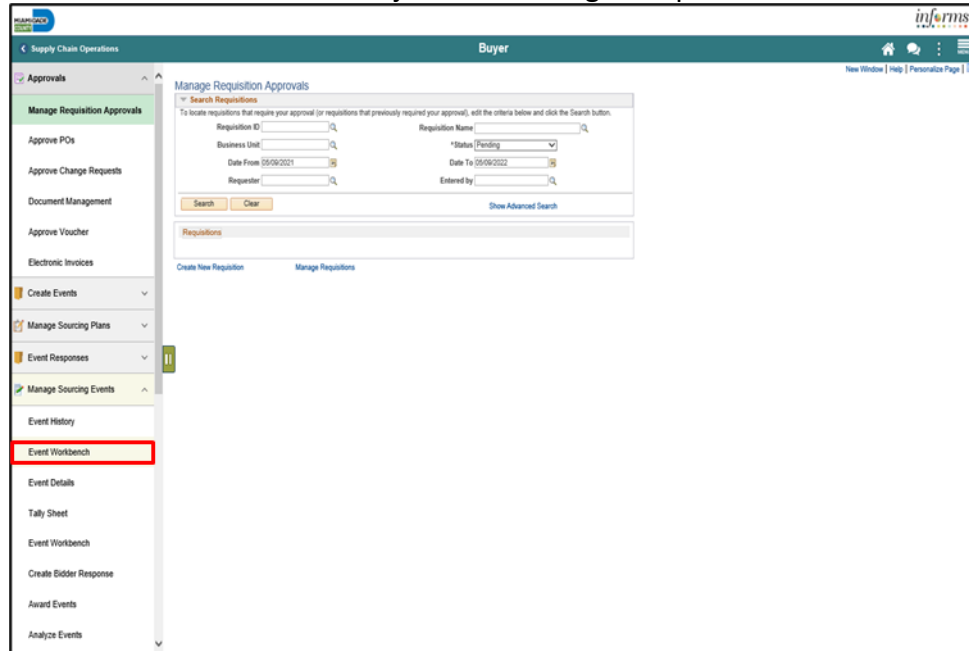
Utilizing the strategic sourcing module, Buyers can award events in multiple methods. Through this lesson, Buyers will be guided on how to review each bidder's bid for each group in the event and proceed to an award for events advertised on a group-by-group basis.

Navigate to: **Finance / Supply Chain (FSCM) > Supply Chain Operations > Buyer**
1. Select **Manage Sourcing Events** option in the navigation pane.



The screenshot shows the 'Buyer' interface with the 'Supply Chain Operations' menu. The left navigation pane lists various options, with 'Manage Sourcing Events' highlighted in green and a red box. The main area displays the 'Add a Document' form with fields for Source Transaction (Ad Hoc), SetID (MDC), Ad Hoc ID (NEXT), Description, Contract Style, and Document Type. Buttons for 'Add a Document', 'Copy Document', and 'Import Document' are visible.

2. Select the **Event Workbench** object in the navigation pane.



The screenshot shows the 'Buyer' interface with the 'Supply Chain Operations' menu. The left navigation pane lists various options, with 'Event Workbench' highlighted in green and a red box. The main area displays the 'Manage Requisition Approvals' form, which includes search criteria for Requisition ID, Business Unit, Date From, Date To, Requisition Name, Status, and Entered by. A 'Search' button is present.

Module 7: Analyzing an Event

Lesson 5: Analyzing an Event by Group

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

Event Workbench

Search Criteria

Business Unit: ID [Q]

Event ID: [] From Start Date: [] To Start Date: [] Sort With: []

Created By: [Q] 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: [Q] Plan Name: [Q] **Search** **Reset** Default Search Preferences

Legend

Search Results: 1-25 of 583 View 100

Event ID	Name	Format	Type	Unit	Status
0000000037	4-18-Test	Buy	Rfx	ID	04/21/2024 08:37 PM EDT
0000000073	Test Form #2	Buy	Rfx	AD	11/30/2022 02:11 PM
0000000072	TEST FORMS	Buy	Rfx	AD	09/01/2022 08:50 PM EDT
0000000403	EXT-SS-230,236,237...	Buy	Rfx	AU	09/30/2022 11:18 AM EDT
0000000037	XAL TEST	Buy	Rfx	AU	09/01/2022 07:50 PM EDT
0000000013	WEB FORMS SAMPLE	Buy	Rfx	ID	09/01/2022 01:43 PM EDT
0000000361	IN001101, IN01102...	Buy	Rfx	AU	09/01/2022 01:43 PM EDT
0000000492	SS Rfx Group - Rob...	Buy	Rfx	ID	Open
0000000020	TEST	Buy	Rfx	AD	Open
0000000014	IT	Buy	Rfx	ID	Open
0000000000	TEST	Buy	Rfx	CH	09/11/2022 01:43 PM EDT
0000000099	test	Buy	Rfx	CH	09/11/2022 01:43 PM EDT
0000000001	Testing for Guide	RFX	Rfx	ID	Open
0000000098	Testing GR	Buy	Rfx	ID	09/11/2022 11:36 AM EDT
0000000097	qa link check 2	Buy	Rfx	ID	09/10/2022 07:26 PM EDT
0000000026	TALLY V (BID) BIDDING	Buy	Rfx	IN	Event Completed

- Expand the **Legend** menu.

Event Workbench

Search Criteria

Business Unit: ID [Q]

Event ID: [] From Start Date: [] To Start Date: [] Sort With: []

Created By: [Q] 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: [Q] Plan Name: [Q] **Search** **Reset** Default Search Preferences

Legend

Search Results: 1-25 of 41 View All

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-01057	Buy	Rfx	ID	Pending Award
0000000197	RFP-01058	Buy	Rfx	ID	Pending Award
0000000207	ITB with over 30 g...	Buy	Rfx	ID	Pending Award
0000000219	RFO9562-S20TPW	Buy	Rfx	ID	Pending Award
0000000299	Rfx - ITB with few...	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	TALLYSHEET LINES T...	Buy	Rfx	ID	Pending Award
0000000476	TALLY SHEET LINES	Buy	Rfx	IN	Pending Award

Module 7: Analyzing an Event

Lesson 5: Analyzing an Event by Group

5. Select the **Analyze Bids** button.

The screenshot shows the 'Event Workbench' interface. On the left is a sidebar with navigation options: Approvals, Create Events, Manage Sourcing Plans, Event Responses, Manage Sourcing Events, Event History, 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 'Event Workbench' section is active. It contains search criteria fields for Business Unit, Event ID, Created By, Event Format, Event Type, Event Status, Associated With Plan, From Start Date, From End Date, To Start Date, To End Date, Category, Item ID, Description, and Plan Name. There are also checkboxes for 'Only show Events I created', 'Only show Active Events', and 'Use my search defaults'. A 'Search' button and a 'Reset' button are present. Below the search criteria is a 'Search Results' table with columns: Event ID, Name, Format, Type, Unit, and Status. The table lists several events, including 'No Bid', 'test My Sourcing E...', 'RFP-01058', 'ITB with over 30 o...', 'RFQ952-52DTPW', 'RFX - ITB with new...', 'Invitation to Bid', 'Event to test award...', 'RM Test4 RFX', 'TALLY TEST 1', 'TALLY TEST 2', and 'TALLY TEST 2'.

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

The screenshot shows the 'Analyze Total' interface. At the top, there are fields for 'Analyze Total', 'Analyze Group', and '*Contract Set-Aside:'. The '*Contract Set-Aside:' dropdown is open, showing options 'No' and 'Yes'. Below this are fields for 'Business Unit', 'Event ID', 'Round', 'Version', 'Event', 'Event Format', 'Event Type', 'Currency', 'End Date', 'Status', 'Go To', and 'Total Bids Received'. The 'Event' field is set to 'TALLY TEST 1'. Below these fields is a section for 'Bid Analysis and Display Options'. The 'Analysis' section shows a table with columns: Bidder Name, Bidder Size, Event Version Responded To, Bid Number, Bid Qty, and Ext. Price. The table lists five bidders: DADE PAPER & BAG LLC, MAGNIE LEARNING INC, OFFICE DEPOT INC, OUTFRONT MEDIA MIAMI LLC, and VISTA BUILDING MAINTENANCE SERVICES INC. Below the table is a section for 'Factors' with a sub-section 'UOM: Ideal Bidder's Answers'. This section contains a series of questions with 'Yes' and 'No' buttons. The questions are: 'Are you a certified Miami-Dade County Tier Small Business Enterprise? If not, please select "None"', 'Are you classified as a local vendor?', 'Are you locally headquartered?', and 'Are you a locally certified Veteran Business Enterprise (VBE)?'. Below the factors section is a 'Verification' section.

Module 7: Analyzing an Event

Lesson 5: Analyzing an Event by Group

7. Select the applicable option from the **Contract Amount** drop-down.

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

Analyze Total

Business Unit: Event ID: Round: Version: Event Name: TALLY TEST 1
 ID: 0000000467 Event Type: 1 End Date: Status: Pending Award
 Event Format: RFX Currency: USD 03/24/2022 1:00PM EDT
 Bid Analysis and Display Options

*Contract Set-Aside: Yes *Contract Amount: 1-\$400,000 and below
 2-\$250,000 01-\$5,000,000 5

Go To: Go To

Analysis

Bidder Name	DADE PAPER & BAG LLC	MAGNIE LEARNING INC	OFFICE DEPOT INC	OUTFRONT MEDIA MIAMI LLC	VISTA BUILDING MAINTENANCE SERVICES INC
Bidder Seq#	1	2	3	4	5
Event Version Responded To	1	1	1	1	1
Bid Number	1	1	1	1	1
Bid Qty	2,000	2,000	2,000	2,000	2,000
Ext. Price	270,000.00	230,000.00	200,000.00	234,000.00	222,000.00

Factors

UOM: Ideal Bidder's Answers

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

None None SBE TIER 2 None SBE TIER 1

Are you classified as a local vendor?

Y Y Y N N Y

Are you locally headquartered?

Y Y Y N N Y

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

Y N N Y Y N

Verification

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

Analyze Total

Business Unit: Event ID: Round: Version: Event Name: Jonathan Development RFP Income Cap
 ID: 0000000467 Event Type: 3 End Date: Status: Pending RFP Review
 Event Format: RFX Currency: USD 04/26/2022 4:00PM EDT
 Bid Analysis and Display Options

*Contract Set-Aside: Yes *Contract Amount: 1-\$250,000 and below
 Total Bids Received: 4

Go To: Go To

Analysis

Bidder Name	OFFICE DEPOT INC	ELECTRONIC RECYCLING CENTER INC	OUTFRONT MEDIA MIAMI LLC	FLORIDA FIRE ALARM INC
Bidder Seq#	1	2	3	4
Event Version Responded To	3	3	3	3
Bid Number	1	1	1	1
Bid Qty	0	0	0	0
Ext. Price	0.00	0.00	0.00	0.00

Factors

Verification

Is Bidder SBE Tier certified?

Bidder qualifies 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 Active

Hide Bid

Recalculate Undo This < > >>

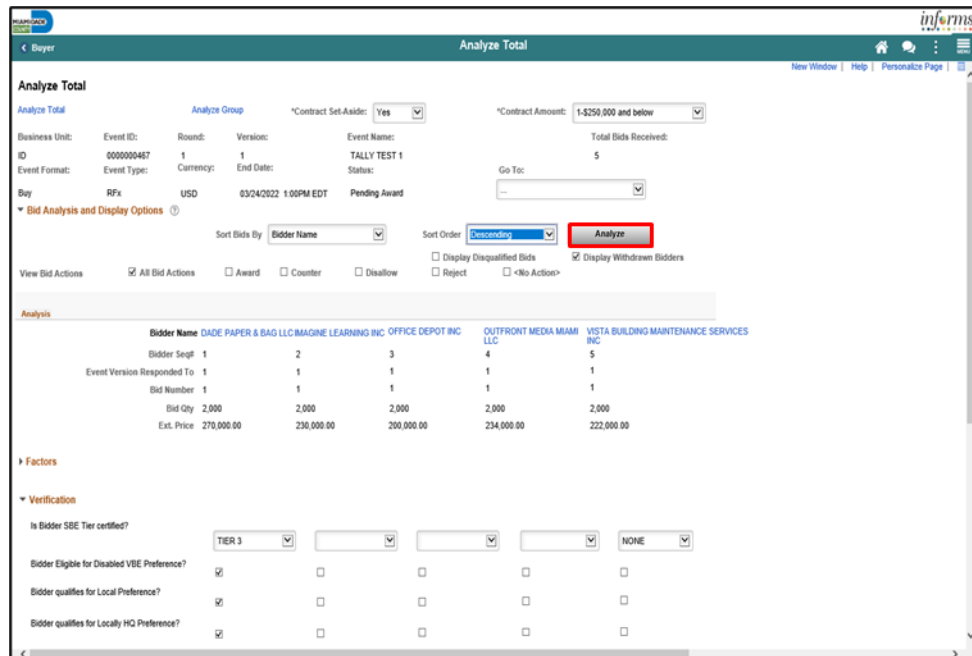
Save Return to Search

Module 7: Analyzing an Event

Lesson 3: Analyzing an Event by Group

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

8. Select the applicable **Sort Bids By** and **Sort Order** options. Then select the **Analyze** button.



Analyze Total

Business Unit: Event ID: Round: Version: Event Name: Total Bids Received:
ID: 000000467 1 1 TALLY TEST 1 5
Event Format: Event Type: Currency: End Date: Status: Go To:
Buy Rfx USD 03/24/2022 1:05PM EDT Pending Award

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	DADE PAPER & BAG LLC	IMAGINE LEARNING INC	OFFICE DEPOT INC	OUTFRONT MEDIA MIAMI LLC	VISTA BUILDING MAINTENANCE SERVICES INC
Bidder Seq#	1	2	3	4	5
Event Version Responded To	1	1	1	1	1
Bid Number	1	1	1	1	1
Bid Qty	2,000	2,000	2,000	2,000	2,000
Ext. Price	270,000.00	230,000.00	200,000.00	234,000.00	222,000.00

Factors

Verification

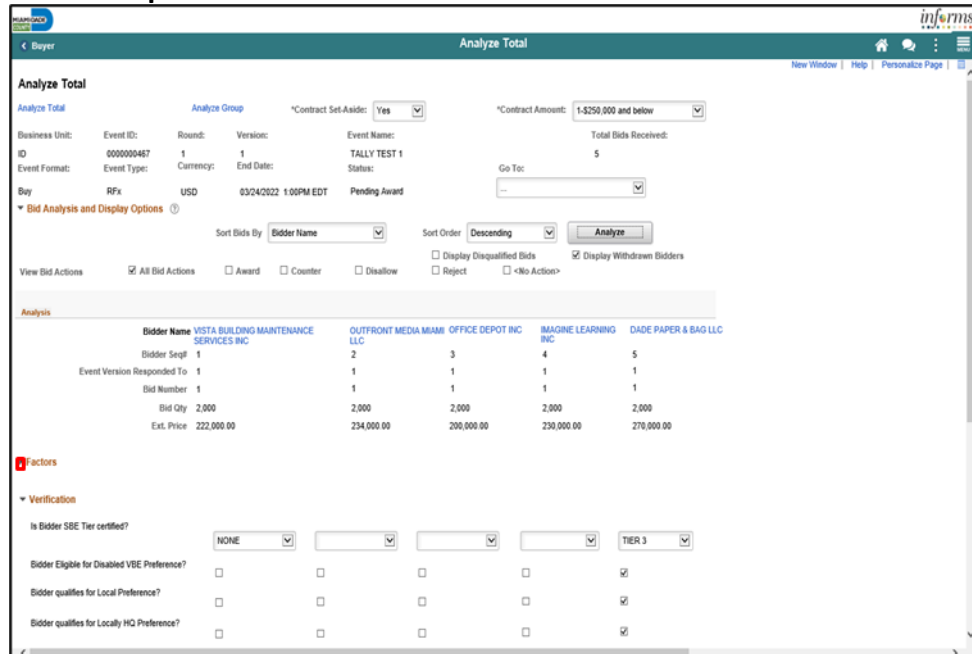
Is Bidder SBE Tier certified? TIER 3 ☐ ☐ ☐ ☐ NONE ☐

Bidder Eligible for Disabled VBE Preference? ☒ ☐ ☐ ☐ ☐

Bidder qualifies for Local Preference? ☒ ☐ ☐ ☐ ☐

Bidder qualifies for Locally HQ Preference? ☒ ☐ ☐ ☐ ☐

9. Select the **Expand section Factors** button.



Analyze Total

Business Unit: Event ID: Round: Version: Event Name: Total Bids Received:
ID: 000000467 1 1 TALLY TEST 1 5
Event Format: Event Type: Currency: End Date: Status: Go To:
Buy Rfx USD 03/24/2022 1:05PM EDT Pending Award

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	VISTA BUILDING MAINTENANCE SERVICES INC	OUTFRONT MEDIA MIAMI LLC	OFFICE DEPOT INC	IMAGINE LEARNING INC	DADE PAPER & BAG LLC
Bidder Seq#	1	2	3	4	5
Event Version Responded To	1	1	1	1	1
Bid Number	1	1	1	1	1
Bid Qty	2,000	2,000	2,000	2,000	2,000
Ext. Price	222,000.00	234,000.00	200,000.00	230,000.00	270,000.00

Factors

Verification

Is Bidder SBE Tier certified? NONE ☐ ☐ ☐ ☐ TIER 3 ☒

Bidder Eligible for Disabled VBE Preference? ☐ ☐ ☐ ☐ ☒

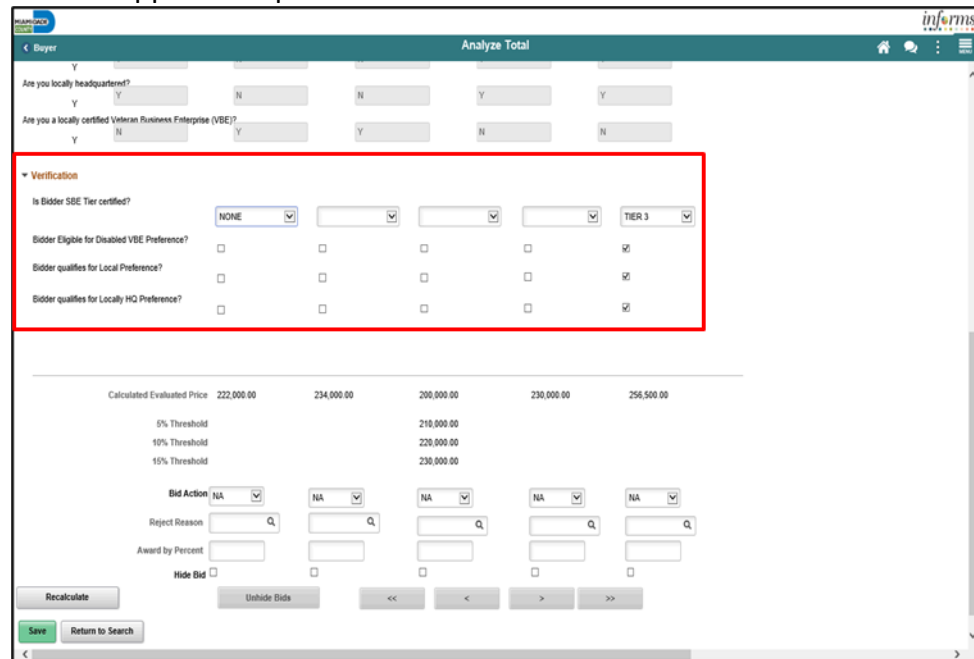
Bidder qualifies for Local Preference? ☐ ☐ ☐ ☐ ☒

Bidder qualifies for Locally HQ Preference? ☐ ☐ ☐ ☐ ☒

Module 7: Analyzing an Event

Lesson 5: Analyzing an Event by Group

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



Verification

Is Bidder SBE Tier certified?

Bidder Eligible for Disabled VBE Preference?

Bidder qualifies for Local Preference?

Bidder qualifies for Locally HQ Preference?

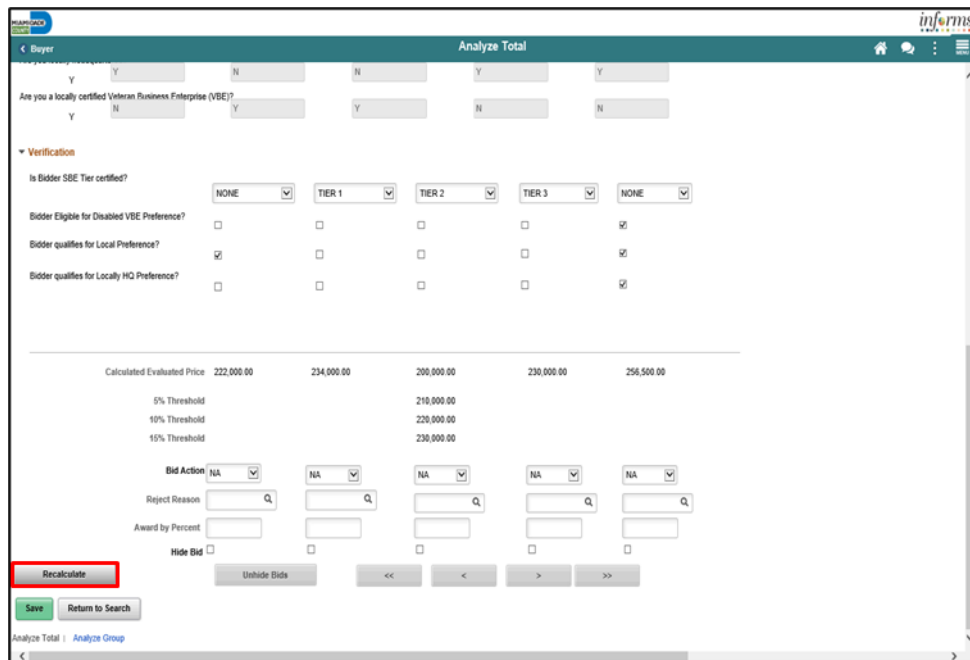
Calculated Evaluated Price	222,000.00	234,000.00	200,000.00	230,000.00	256,500.00
5% Threshold			210,000.00		
10% Threshold			220,000.00		
15% Threshold			230,000.00		

Recalculate

Save Return to Search

11. Select the **Recalculate** button.

12. Select the Save



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	222,000.00	234,000.00	200,000.00	230,000.00	256,500.00
5% Threshold			210,000.00		
10% Threshold			220,000.00		
15% Threshold			230,000.00		

Recalculate

Save Return to Search

Module 7: Analyzing an Event

Lesson 5:
Analyzing an
Event by Group

13. Select the **Analyze Group** link.

The screenshot shows the 'Analyze Total' form. It includes a 'Verification' section with dropdowns for 'Is Bidder SBE Tier certified?' (NONE, TIER 1, TIER 2, TIER 3) and checkboxes for 'Bidder Eligible for Disabled VBE Preference?', 'Bidder qualifies for Local Preference?', and 'Bidder qualifies for Locally HQ Preference?'. Below this is a table showing 'Calculated Evaluated Price' and thresholds (5%, 10%, 15%). There are also input fields for 'Bid Action', 'Reject Reason', 'Award by Percent', and 'Hide Bid'. At the bottom, there are buttons for 'Recalculate', 'Save', 'Return to Search', and 'Unhide Bids'.

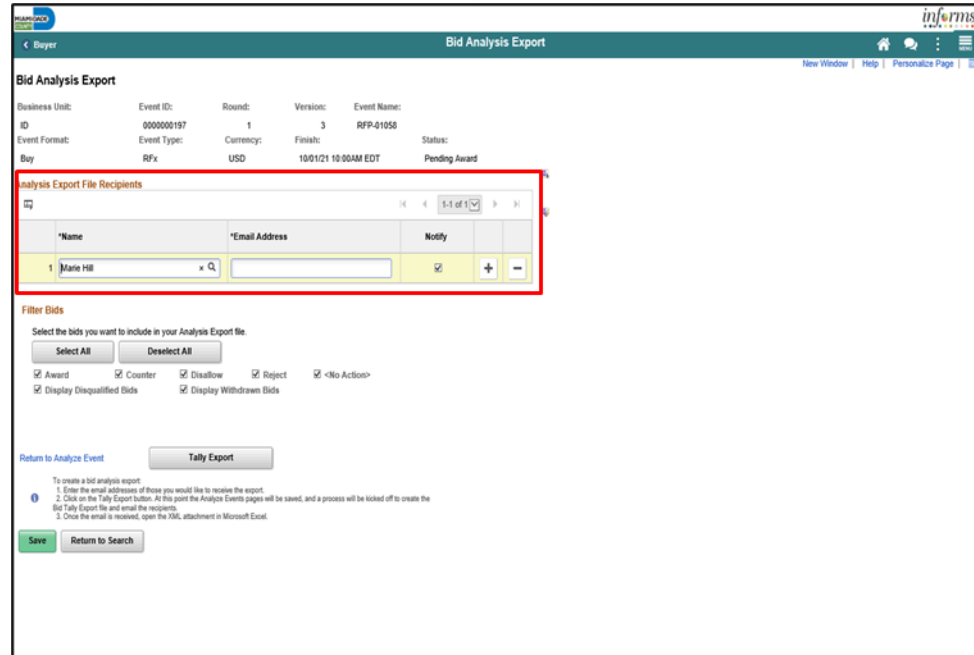
14. Select the **...Analyze Export** list item from the **Go To..** dropdown.

The screenshot shows the 'Analyze Group' form. It displays event details such as 'Event ID', 'Round', 'Version', 'Event Name', 'Status', 'Event Format', 'Event Type', 'Currency', 'End Date', 'Buy', 'RFx', 'USD', '03/24/2022 1:00PM EDT', and 'Pending Award'. Below this is a table of line items with columns: Line, Group ID, Description, Details, UOM, Start Price, Requested Qty, and Analyze. A dropdown menu is open, showing the 'Analyze Export' option highlighted. The table contains two line items: 'METAL CHAIRS GROUP' and 'WOOD CHAIRS GROUP'.

Module 7: Analyzing an Event

Lesson 5: Analyzing an Event by Group

15. Input the applicable details for the **Export Recipient**.



Bid Analysis Export

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

Analysis Export File Recipients

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

Filter Bids

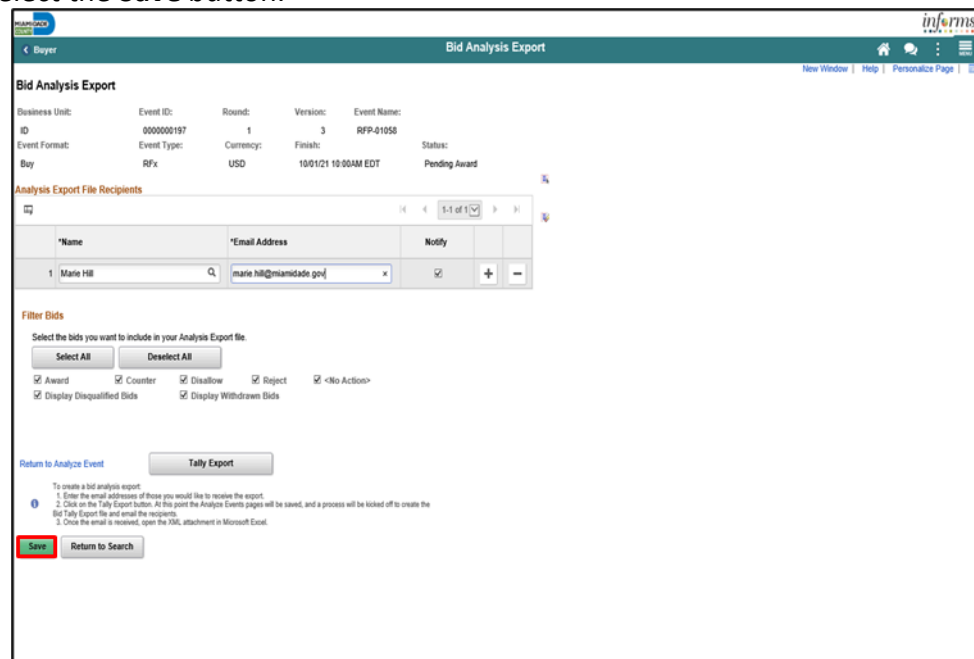
Select the bids you want to include in your Analysis Export file.

☒ 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.

16. Select the **Save** button.



Bid Analysis Export

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

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

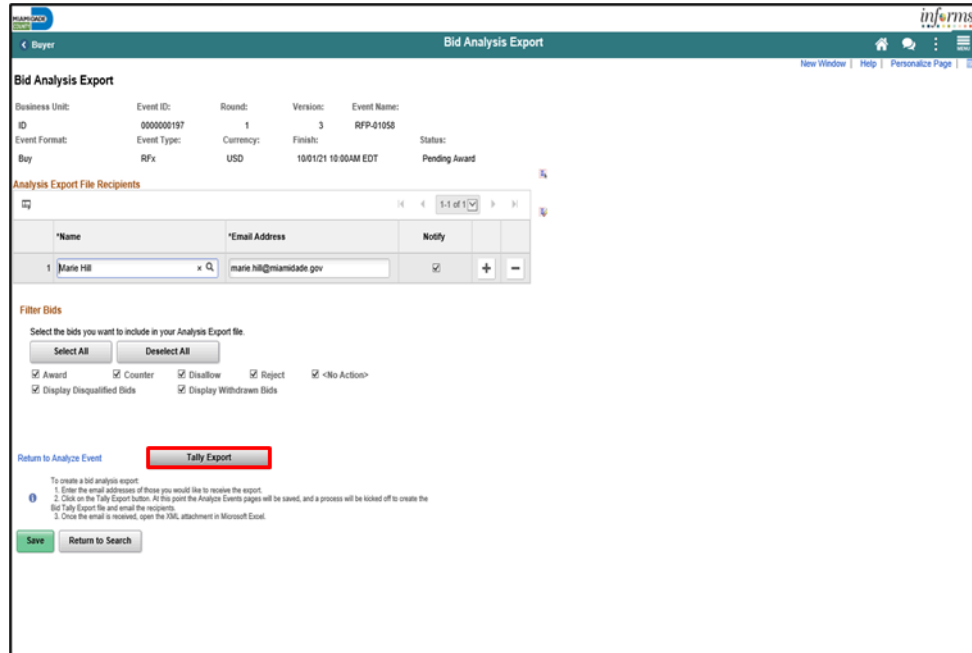
[Return to Analyze Event](#)

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.

Module 7: Analyzing an Event

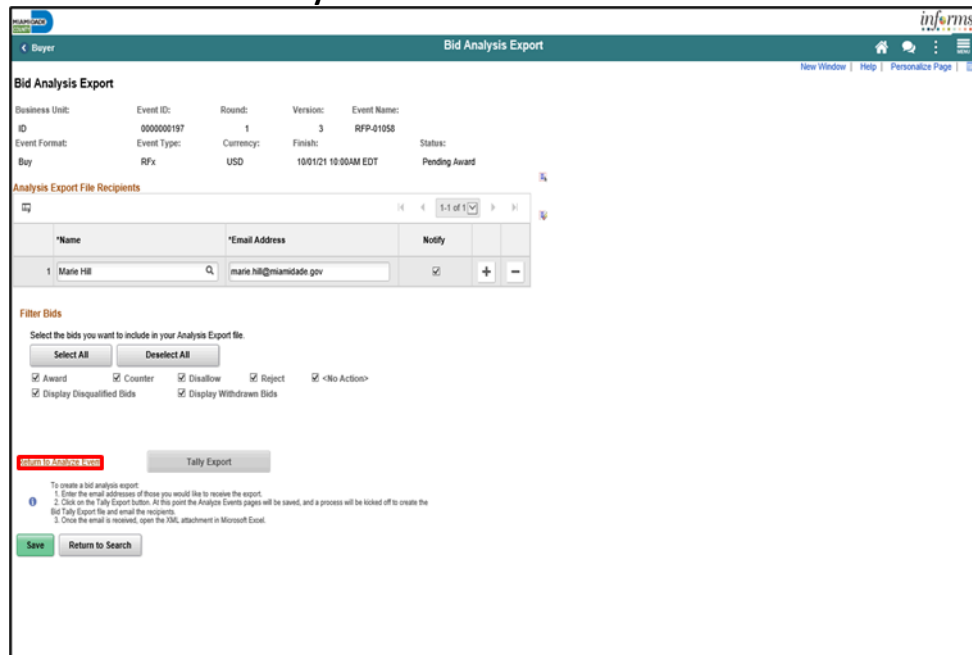
Lesson 5: Analyzing an Event by Group

17. Select the **Tally Export** button.



The screenshot shows the 'Bid Analysis Export' page in the informs system. The page includes a header with 'Buyer' and 'Bid Analysis Export'. Below the header, there are fields for Business Unit, Event ID, Round, Version, and Event Name. The 'Analysis Export File Recipients' section contains a table with columns for Name, Email Address, and Notify. The 'Filter Bids' section has buttons for 'Select All' and 'Deselect All', and checkboxes for 'Award', 'Counter', 'Disallow', 'Reject', 'Display Disqualified Bids', and 'Display Withdrawn Bids'. The 'Return to Analyze Event' link is highlighted with a red box, and the 'Tally Export' button is also highlighted with a red box.

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

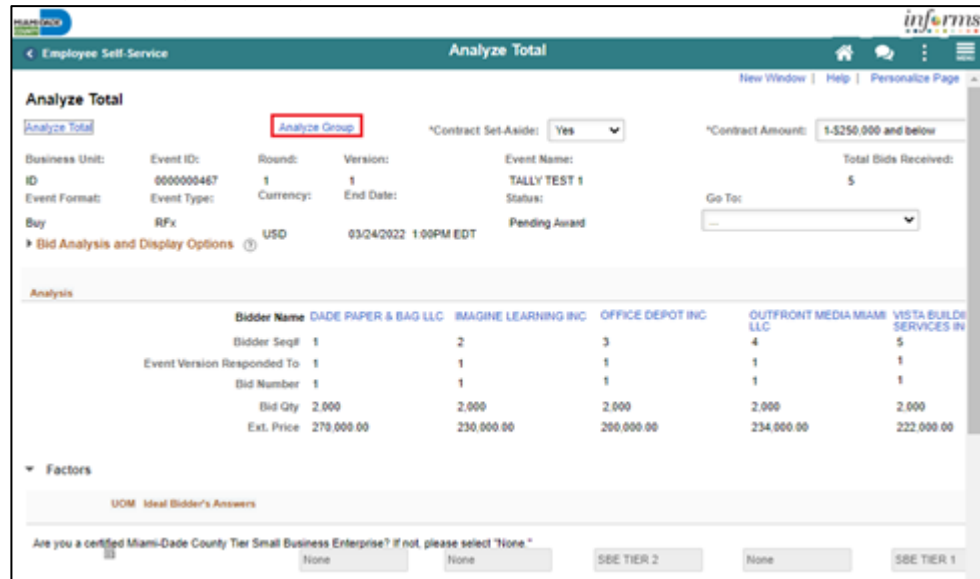


The screenshot shows the 'Bid Analysis Export' page in the informs system. The page includes a header with 'Buyer' and 'Bid Analysis Export'. Below the header, there are fields for Business Unit, Event ID, Round, Version, and Event Name. The 'Analysis Export File Recipients' section contains a table with columns for Name, Email Address, and Notify. The 'Filter Bids' section has buttons for 'Select All' and 'Deselect All', and checkboxes for 'Award', 'Counter', 'Disallow', 'Reject', 'Display Disqualified Bids', and 'Display Withdrawn Bids'. The 'Return to Analyze Event' link is highlighted with a red box, and the 'Tally Export' button is also highlighted with a red box.

Module 7: Analyzing an Event

Lesson 5: Analyzing an Event by Group

19. Select the **Analyze Group** link.



Analyze Total

Business Unit: Event ID: Round: Version: Event Name: Total Bids Received:
 ID: 0000000467 1 1 TALLY TEST 1 5
 Event Format: Event Type: Currency: End Date: Status: Go To:
 Buy RFX USD 03/24/2022 1:00PM EDT Pending Award

► Bid Analysis and Display Options ⓘ

Analysis

Bidder Name	DADE PAPER & BAG LLC	IMAGINE LEARNING INC	OFFICE DEPOT INC	OUTFRONT MEDIA MIAMI LLC	VISTA BUILDING SERVICES INC
Bidder Seq#	1	2	3	4	5
Event Version Responded To	1	1	1	1	1
Bid Number	1	1	1	1	1
Bid Qty	2,000	2,000	2,000	2,000	2,000
Ext. Price	270,000.00	230,000.00	200,000.00	234,000.00	222,000.00

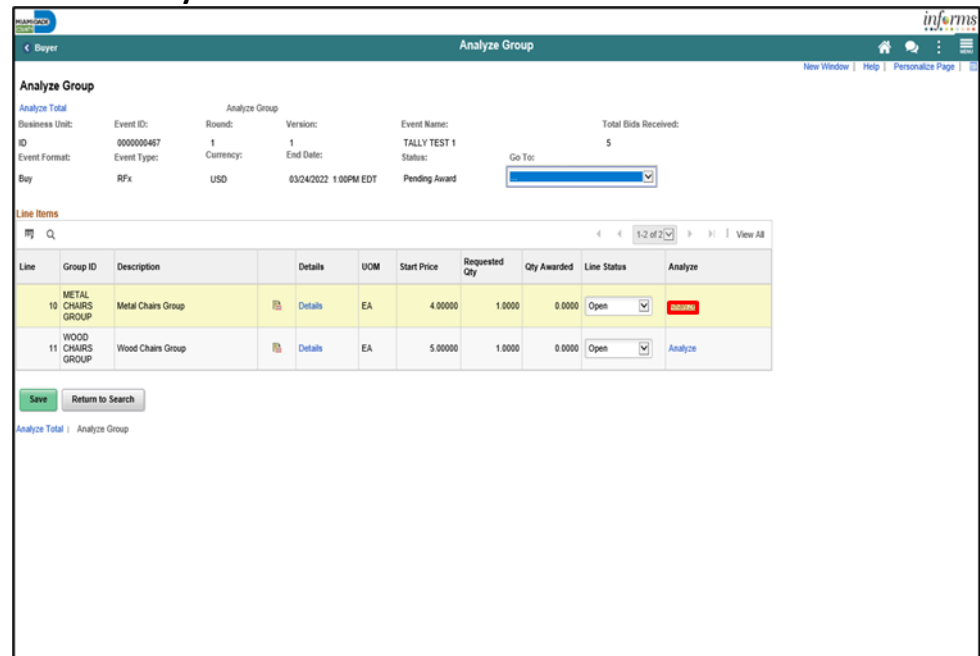
▼ Factors

UOM Ideal Bidder's Answers

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

None SBE TIER 2 None SBE TIER 1

20. Select the **Analyze** link.



Analyze Group

Business Unit: Event ID: Round: Version: Event Name: Total Bids Received:
 ID: 0000000467 1 1 TALLY TEST 1 5
 Event Format: Event Type: Currency: End Date: Status: Go To:
 Buy RFX USD 03/24/2022 1:00PM EDT Pending Award

Line Items

Line	Group ID	Description	Details	UOM	Start Price	Requested Qty	Qty Awarded	Line Status	Analyze
10	METAL CHAIRS GROUP	Metal Chairs Group	Details	EA	4.00000	1.0000	0.0000	Open	Analyze
11	WOOD CHAIRS GROUP	Wood Chairs Group	Details	EA	5.00000	1.0000	0.0000	Open	Analyze

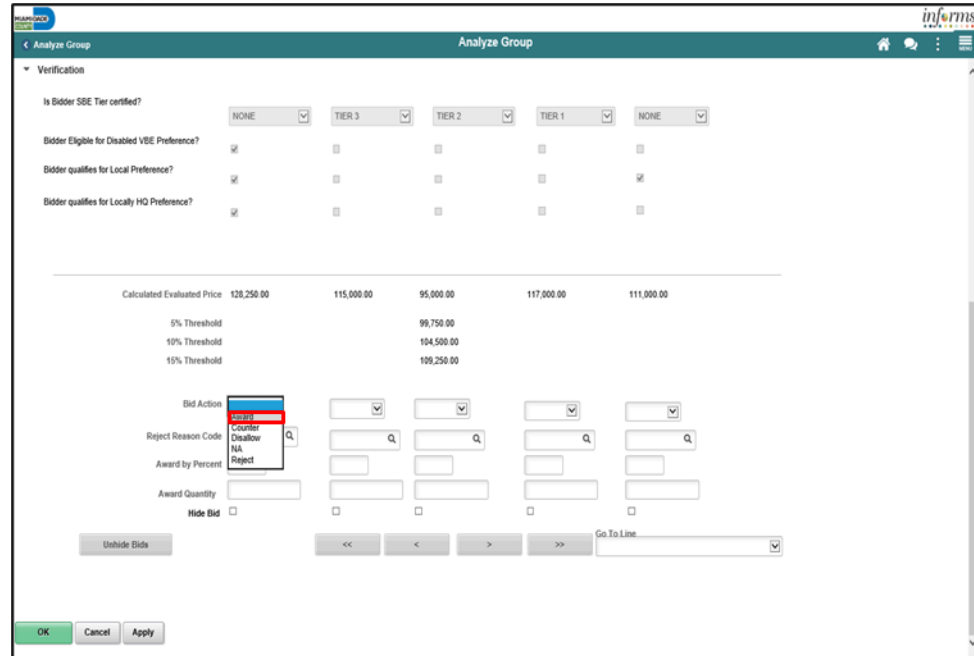
[Save](#) [Return to Search](#)

[Analyze Total](#) | [Analyze Group](#)

Module 7: Analyzing an Event

Lesson 5: Analyzing an Event by Group

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

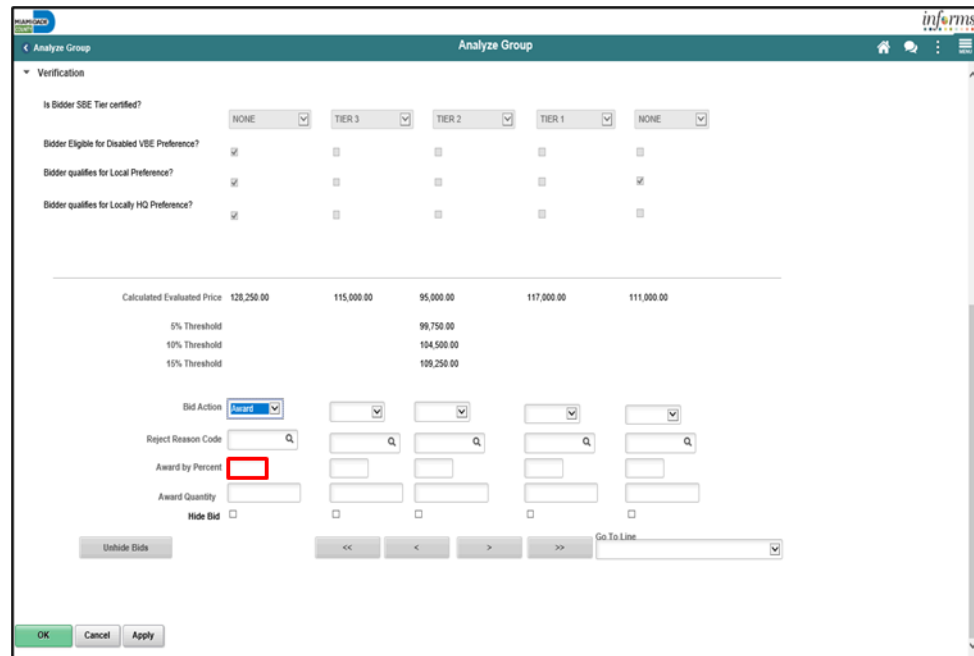


The screenshot shows the 'Analyze Group' interface with the 'Verification' section expanded. The 'Bid Action' dropdown is open, showing options: Award, Counter Offer, NA, and Reject. The 'Award' option is highlighted. The interface also displays a table of calculated evaluated prices and thresholds for five bidders.

	Bidder 1	Bidder 2	Bidder 3	Bidder 4	Bidder 5
Calculated Evaluated Price	128,250.00	115,000.00	95,000.00	117,000.00	111,000.00
5% Threshold			99,750.00		
10% Threshold			104,500.00		
15% Threshold			109,250.00		

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

Note: Selecting 100 percent is part of the analysis of the bids and will not award the contract. Refer to Module 8 for information on awarding events.



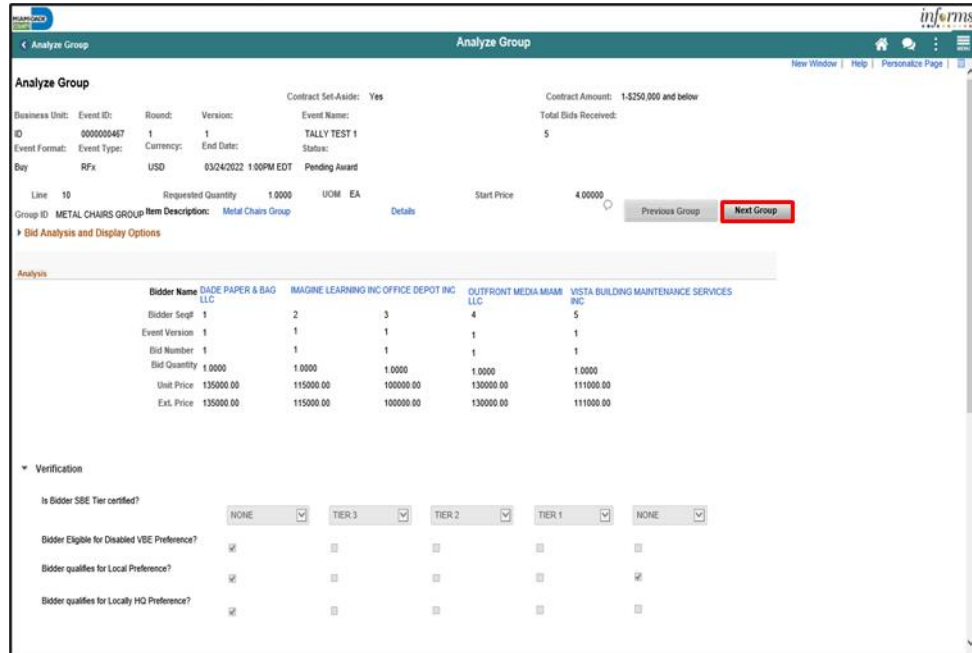
The screenshot shows the 'Analyze Group' interface with the 'Verification' section expanded. The 'Award by Percent' field is highlighted with a red box, indicating where to enter '100'. The 'Bid Action' dropdown is now set to 'Award'.

	Bidder 1	Bidder 2	Bidder 3	Bidder 4	Bidder 5
Calculated Evaluated Price	128,250.00	115,000.00	95,000.00	117,000.00	111,000.00
5% Threshold			99,750.00		
10% Threshold			104,500.00		
15% Threshold			109,250.00		

Module 7: Analyzing an Event

Lesson 5: Analyzing an Event by Group

23. Select the **Next Group** button.



Analyze Group

Business Unit: Event ID: Round: Version: Contract Set Aside: Yes Contract Amount: 1-\$250,000 and below
 ID: 000000467 Event Name: TALLY TEST 1 Total Bids Received: 5
 Event Format: Event Type: End Date: Status:
 Bay RFx USD 03/24/2022 1:00PM EDT Pending Award

Line 10 Requested Quantity 1.0000 UOM EA Start Price 4.00000
 Group ID: METAL CHAIRS GROUP Item Description: Metal Chairs Group Details Previous Group **Next Group**

► Bid Analysis and Display Options

Analysis

Bidder Name	DADE PAPER & BAG LLC	IMAGINE LEARNING INC OFFICE DEPOT INC	OUTFRONT MEDIA MIAMI LLC	VISTA BUILDING MAINTENANCE SERVICES INC
Bidder Seq#	1	2	3	4
Event Version	1	1	1	1
Bid Number	1	1	1	1
Bid Quantity	1.0000	1.0000	1.0000	1.0000
Unit Price	135000.00	115000.00	100000.00	130000.00
Ext. Price	135000.00	115000.00	100000.00	111000.00

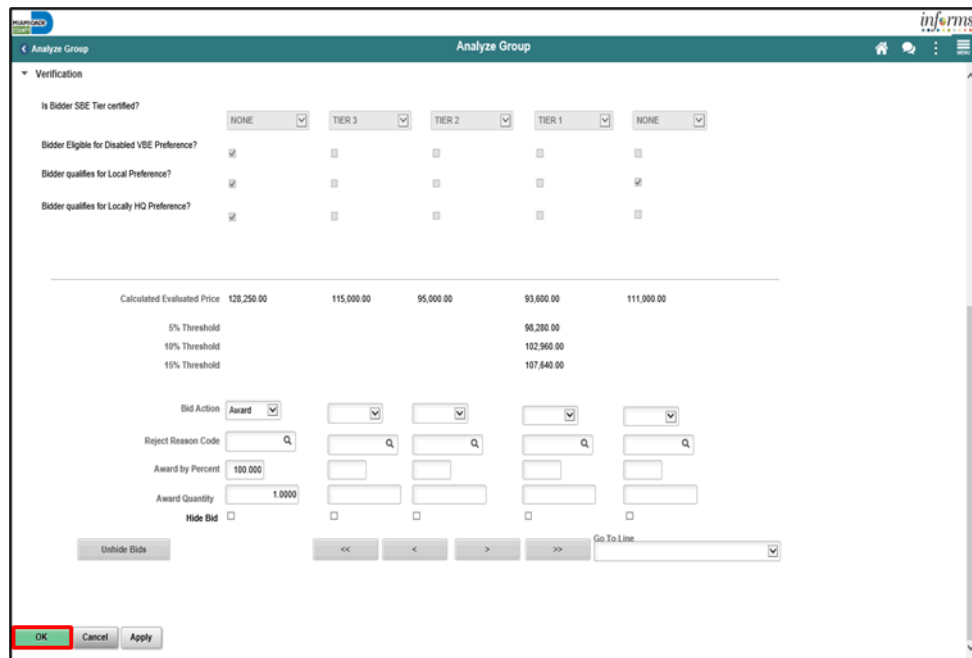
▼ Verification

Is Bidder SBE Tier certified?

	NONE	TIER 3	TIER 2	TIER 1	NONE
Bidder Eligible for Disabled VBE Preference?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bidder qualifies for Local Preference?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bidder qualifies for Locally HQ Preference?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Note: Repeat steps 26 – 28 for each group.

24. Select the **OK** button.



Analyze Group

▼ Verification

Is Bidder SBE Tier certified?

	NONE	TIER 3	TIER 2	TIER 1	NONE
Bidder Eligible for Disabled VBE Preference?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bidder qualifies for Local Preference?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bidder qualifies for Locally HQ Preference?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	128,250.00	115,000.00	95,000.00	93,600.00	111,000.00
Calculated Evaluated Price					
5% Threshold				96,280.00	
10% Threshold				102,960.00	
15% Threshold				107,640.00	

Bid Action: Award

Reject Reason Code:

Award by Percent: 100.000

Award Quantity: 1.0000

Hide Bid: ☐

Unhide Bids:

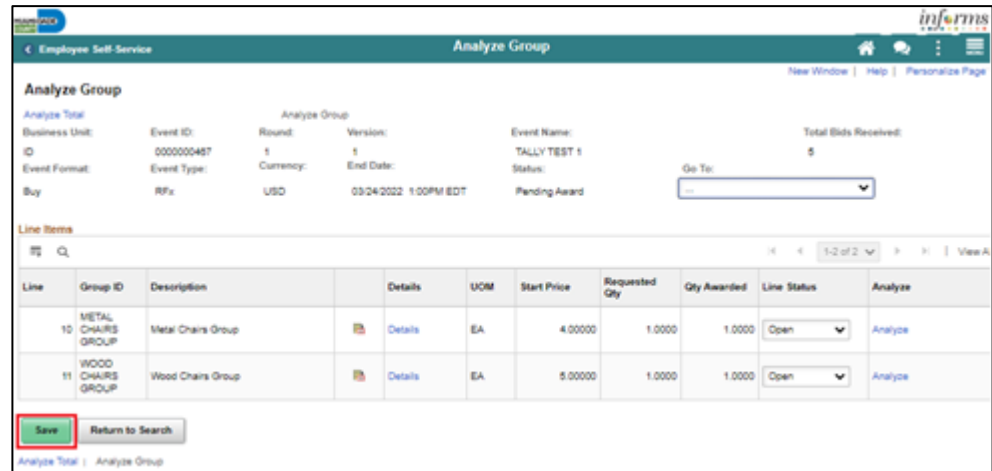
Go To Line:

OK Cancel Apply

Module 7: Analyzing an Event

Lesson 5: Analyzing an Event by Group

25. Select the **Save** button.





Analyze Group

Employee Self-Service | Analyze Group | New Window | Help | Personalize Page

Analyze Total

Business Unit:	Event ID:	Round:	Version:	Event Name:	Total Bids Received:
ID	000000467	1	1	TALLY TEST 1	5
Event Format:	Event Type:	Currency:	End Date:	Status:	Go To:
Buy	RFx	USD	03/24/2022 1:00PM EDT	Pending Award	...

Line Items

Line	Group ID	Description	Details	UCM	Start Price	Requested Qty	Qty Awarded	Line Status	Analyze
10	METAL CHAIRS GROUP	Metal Chairs Group	 Details	EA	4.00000	1.0000	1.0000	Open	Analyze
11	WOOD CHAIRS GROUP	Wood Chairs Group	 Details	EA	5.00000	1.0000	1.0000	Open	Analyze

Save | Return to Search

Analyze Total | Analyze Group

Module 7: Analyzing an Event

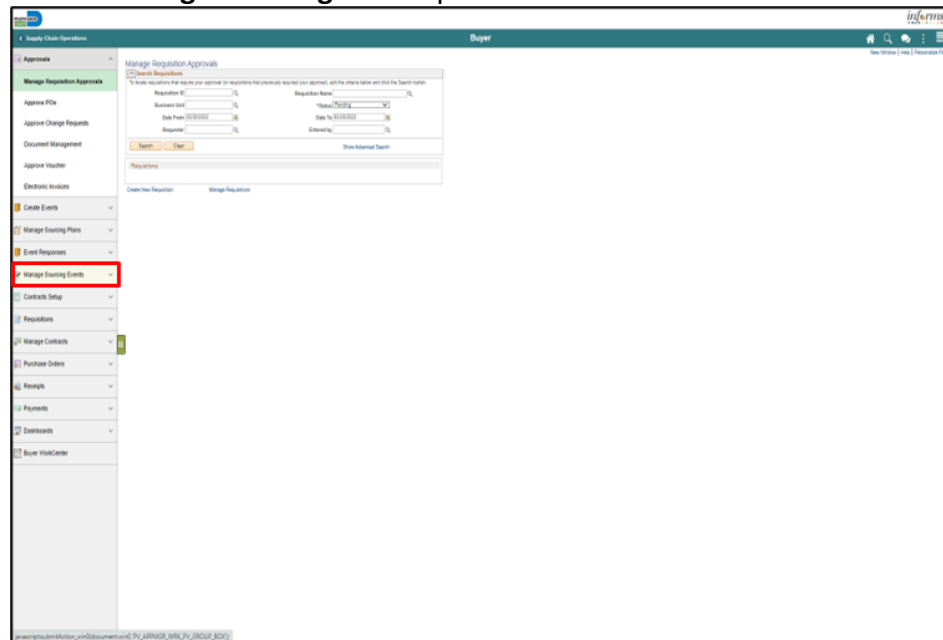
Lesson 6: Analyze an RFI Event

An RFI Event does not have an itemization of cost to analyze within INFORMS. Therefore, the analysis of an RFI event must take place outside of the system and based upon the requirements of the issued solicitation.

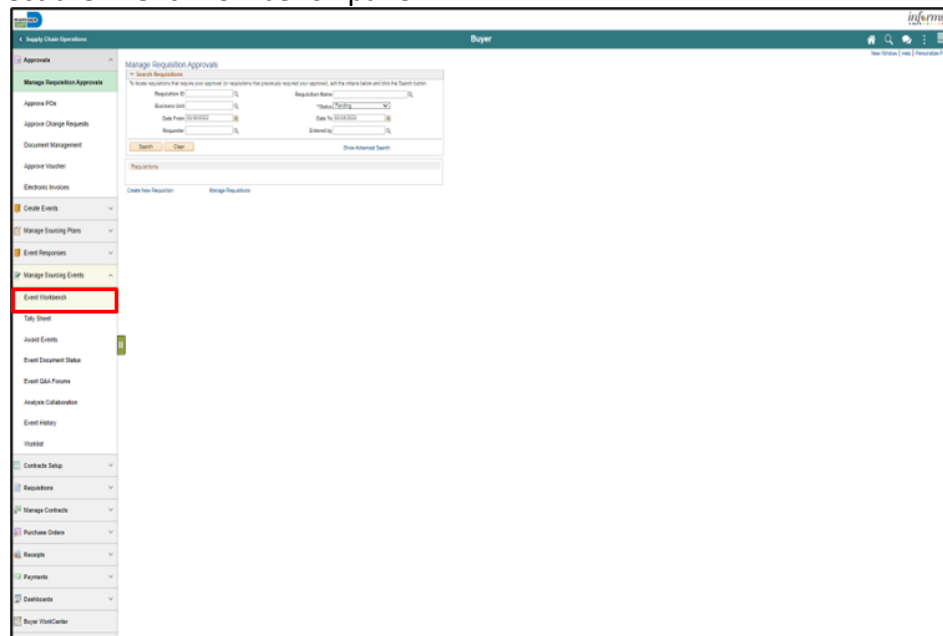
Acknowledgment of the review of the documents is the extent to which an analysis is completed within the system. Therefore, it is the responsibility of the Buyer to ensure compliance as the evaluation is not based on monetary review of the tally sheet.

Navigate to: **Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer**

1. Select the **Manage Sourcing Events** pane.



2. Select the **Event Workbench** pane.



Lesson 6: Analyze an RFI Event

- [New Module](#)
[Help](#)
[Personalize Page](#)

[Supply Chain Operations](#)

[Buyer](#)

[Approvals](#)

[Create Events](#)

[Manage Sourcing Plans](#)

[Event Responder](#)

[Manage Sourcing Events](#)

[Event Workbench](#)

[Tally Sheet](#)

[Award Events](#)

[Event Document Status](#)

[Event QA Forums](#)

[Analysis Collaboration](#)

[Event History](#)

[Tender](#)

[Contracts Setup](#)

[Regulations](#)

[Manage Contracts](#)

[Purchase Orders](#)

[Receipts](#)

[Payments](#)

[Creditcards](#)

[Buyer WorkCenter](#)

Event Workbench

[Search Criteria](#)

Business Unit

Event ID

Created By

Event Format

Event Type

Event Status

Awarded

Cancelled

Collaborating Bid Analysis

Collaborating Event

Not Awarded

Open

Pending Award

Pending Bid Approval

Pending Not Award

From Start Date

To Start Date

Sort With

From End Date

To End Date

Sort Order

Category

Status ID

Description

Plan Name

☐ Only show Events I created

☒ Only show Active Events

☐ Use my search defaults

[Search](#)
[Reset](#)

[Default Search Preferences](#)

Search Results

1-25 of 1231

[View 100](#)

Event ID	Event Name	Type	Unit	Status
EN0000420	RFx	TP	10-10-2020 10:00 PM EDT	
EN0000420	Event Name	Buy	RFx	ID
EN0000419	EN000213 - Add Bid...	Buy	RFx	ID
EN0000421	TEST EVENT FOR CON...	Buy	RFx	TP
EN0000417	TEST	Buy	RFx	ID
EN0000418	test	RFI	RFx	ID
EN0000419	Event Name	Buy	RFx	ID
EN0000419	KING	RFI	RFx	ID
EN0000427	Order - Test for s...	Buy	RFx	ID
EN0000419	TEST	RFI	RFx	ID
EN0000425	Event Group Sample...	Buy	RFx	TP
EN0000426	Event GROUP Sample...	Buy	RFx	TP
EN0000422	TEST 2 DTPN CONSTR...	Buy	RFx	TP
EN0000423	Event Aggregate Sa...	Buy	RFx	TP
EN0000420	TEST 323	Buy	RFx	ID
EN0000420	EN000213 - Add Bid...	Buy	RFx	ID
EN0000418	EN000213	Buy	RFx	ID
EN0000414	EN00007 C	Buy	RFx	ID
EN0000412	Order - Exhibit B	Buy	RFx	ID
EN0000389	Test Bidder Huff...	Buy	RFx	ID
EN0000411	EN00007 B	Buy	RFx	ID

- [illegible]

Module 7: Analyzing an Event

Lesson 6: Analyze an RFI Event

5. Select the **Analyze Bids** button.

The screenshot shows the 'Event Workbench' interface. On the left is a navigation menu with options like 'Approvals', 'Create Events', 'Manage Sourcing Plans', 'Event Responses', 'Event Workbench', 'Tally Sheet', 'Award Events', 'Event Document Status', 'Event QA Forms', 'Analysis Collaboration', 'Event History', 'Worklist', 'Contracts Setup', 'Requisitions', 'Manage Contracts', 'Purchase Orders', 'Receipts', 'Payments', 'Dashboards', and 'Buyer ViewCenter'. The 'Event Workbench' section is active. It features a search criteria form with fields for Business Unit, Event ID, Created By, Event Format, Event Type, Event Status, Associated Item, Plan, Event Start Date, From End Date, To End Date, Start With, and Search. A 'Search' button is present. Below the search form is a table of search results. The table has columns: Event ID, Name, Format, Type, Unit, Status, and a 'Bid' column. The first row is highlighted, and the 'Analyze Bids' button in the 'Bid' column is highlighted with a red box.

6. Select the applicable choice from the **Contract Set-Aside** list.

7. Select the applicable choice from the **Contract Amount** list.

Note: The two fields may be left blank and will not affect the change in status for this portion.

The screenshot shows the 'Analyze Total' interface. It displays details for a specific RFI event, including Business Unit, Event ID, Round, Version, Event Format, Event Type, Event Status, and Event Date. Below this, there is a table of analysis results for various bidders. The 'Contract Set-Aside' and 'Contract Amount' dropdowns are highlighted with a red box. The 'Contract Set-Aside' dropdown is set to 'Yes' and the 'Contract Amount' dropdown is set to '\$1,425,000 and below'. Below the table, there are sections for 'Factors' and 'Verification'. The 'Verification' section includes checkboxes for 'Is Bidder VBE? The certified?', 'VBE Certified Search', 'Bidder Eligible for Disabled VBE Preference?', 'VBE Certification Search', 'Bidder qualifies for Local Preference?', and 'Bidder qualifies for Locally HQ Preference?'. At the bottom, there are buttons for 'Recalculate', 'Calculate', 'Update Data', and 'Return to Search'.

Module 7: Analyzing an Event

Lesson 6: Analyze an RFI Event

The **Merged Files** and **Vendor Files** are accessible by Selecting on the links at the bottom of the page or selecting those options in the **Go To:** dropdown.

Analyze Total

Business Unit: ID 000000567 Event Format: RFI Event Type: RFX Currency: USD Round: 1 End Date: 04/25/2022 6:00PM EDT Version: 3 Event Name: Jonathan Desvergunat RFP Income Cert LLC Status: RFI Reviewed Total Bids Received: 4

*Contract Set-Aside: Yes *Contract Amount: 1-\$250,000 and below

Go To: **Merged Files**

Analysis

Bidder Name	OFFICE DEPOT INC	ELECTRONIC RECYCLING CENTER INC	OUTFRONT MEDIA MIAMI LLC	FLORIDA FIRE ALARM INC
Bidder Seq#	1	2	3	4
Event Version Responded To	3	3	3	3
Bid Number	1	1	1	1
Bid Qty	0	0	0	0
Ext. Price	0.00	0.00	0.00	0.00

Factors

Verification

Calculated Evaluated Price 0.00 0.00 0.00

5% Threshold
10% Threshold
15% Threshold

Bid Action NA NA NA NA

Hide Bid ☐ ☐ ☐ ☐

Recalculate Unhide Bids << < > >>

Save Return to Search

Analyze Total | **Merged Files** | Vendor Files

8. Select the **Expand Factors Section** button.

Analyze Total

Business Unit: ID 000000567 Event Format: RFI Event Type: RFX Currency: USD Round: 1 End Date: 04/25/2022 6:00PM EDT Version: 3 Event Name: Jonathan Desvergunat RFP Income Cert LLC Status: Pending RFI Review Total Bids Received: 4

*Contract Set-Aside: Yes *Contract Amount: 1-\$250,000 and below

Go To: **Merged Files**

Analysis

Bidder Name	OFFICE DEPOT INC	ELECTRONIC RECYCLING CENTER INC	OUTFRONT MEDIA MIAMI LLC	FLORIDA FIRE ALARM INC
Bidder Seq#	1	2	3	4
Event Version Responded To	3	3	3	3
Bid Number	1	1	1	1
Bid Qty	0	0	0	0
Ext. Price	0.00	0.00	0.00	0.00

Factors

Is Bidder VBE Tier certified? ☐ ☐ ☐ ☐

VBE (Public VBE) Certification Search

Bidder Eligible for Disabled VBE Preference? ☐ ☐ ☐ ☐

VBE Certification Search

Bidder qualifies for Local Preference? ☐ ☐ ☐ ☐

Bidder qualifies for Locally HQ Preference? ☐ ☐ ☐ ☐

Calculated Evaluated Price 0.00 0.00 0.00

5% Threshold
10% Threshold
15% Threshold

Bid Action ☐ ☐ ☐ ☐

Hide Bid ☐ ☐ ☐ ☐

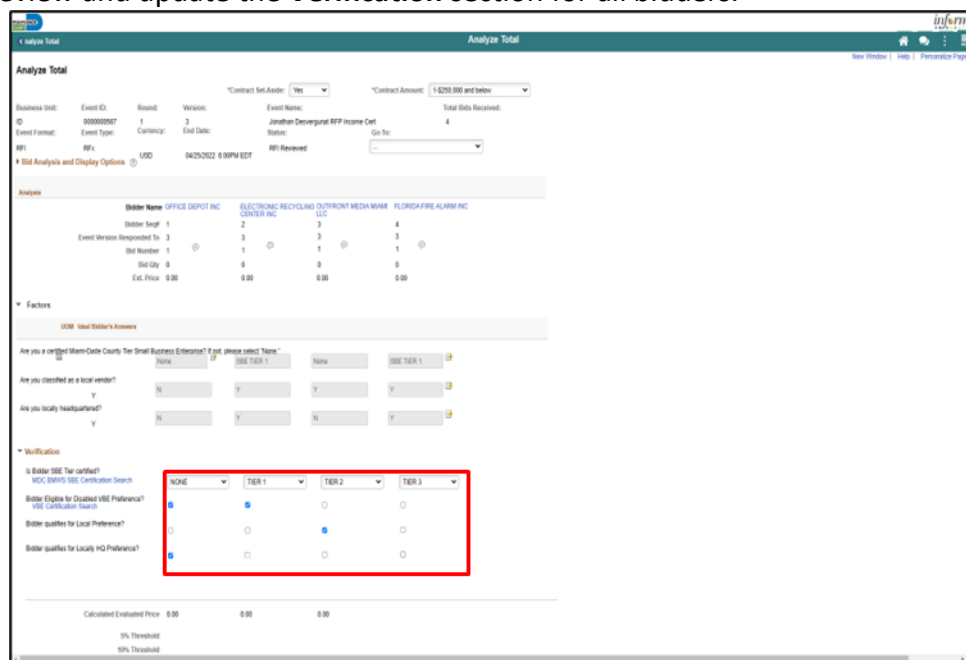
Recalculate Unhide Bids << < > >>

Save Return to Search

Module 7: Analyzing an Event

Lesson 6: Analyze an RFI Event

9. Review and update the **Verification** section for all bidders.



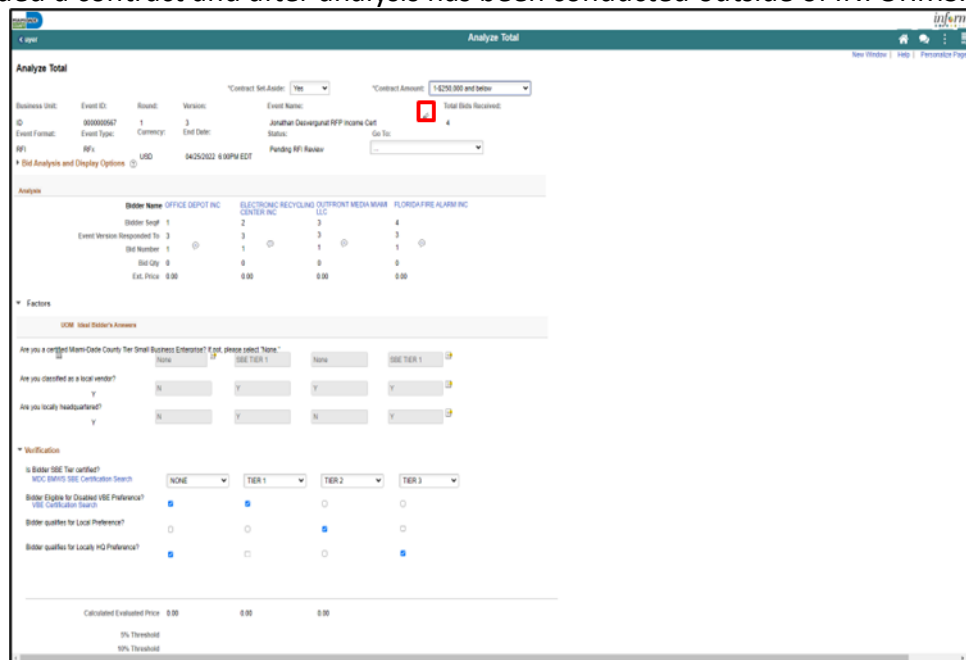
The screenshot shows the 'Analyze Total' page in the INFORMS system. The 'Verification' section is highlighted with a red box. It contains the following fields and options:

- Is Bidder SBE Tier certified?** (NDC, BAFIS SBE Certification Search) with dropdowns for NONE, TIER 1, TIER 2, and TIER 3.
- Bidder Eligible for Disabled VBE Preference?** (VBE Certification Search) with radio buttons for Yes and No.
- Bidder qualifies for Local Preference?** with radio buttons for Yes and No.
- Bidder qualifies for Locally HQ Preference?** with radio buttons for Yes and No.

Below the verification section, there is a table showing calculated evaluated prices for three bidders: OFFICE DEPOT INC, ELECTRONIC RECYCLING CENTER INC, and FLORIDA FIRE ALARM INC. The table includes columns for Bidder Name, Bidder Size, Event Version Responded To, Bid Number, Bid City, and Ext. Price.

10. Select the **Change RFI Status to Reviewed** button.

Note: The RFI status change should only be updated when the RFI is ready to be awarded a contract and after analysis has been conducted outside of INFORMS.

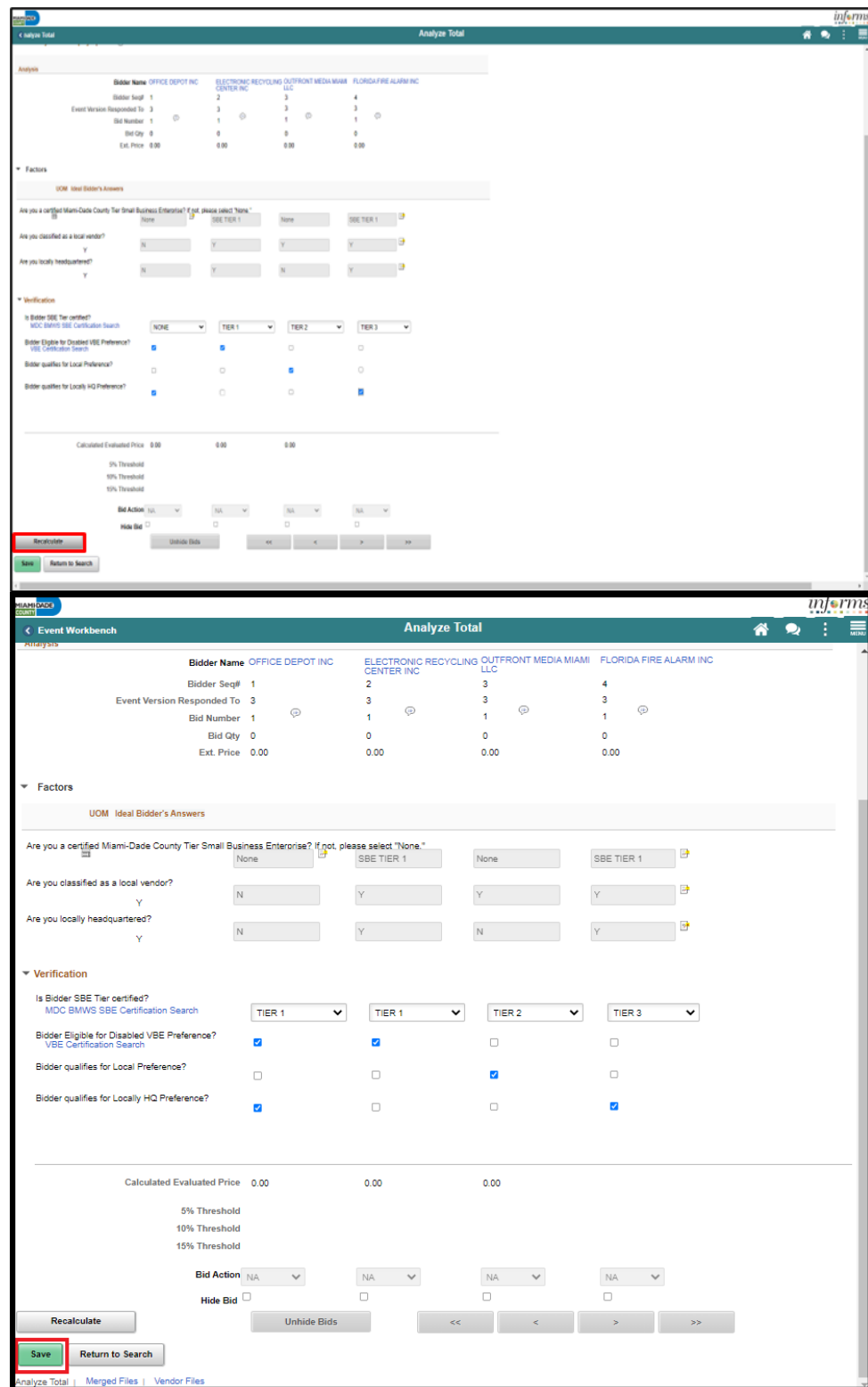


The screenshot shows the 'Analyze Total' page in the INFORMS system. The 'RFI' status is highlighted with a red box, indicating it is 'Pending RFI Review'. The 'Verification' section is also visible, showing the same fields as in the previous screenshot.

Module 7: Analyzing an Event

Lesson 6: Analyze an RFI Event

11. Select the **Save** button.



Analyze Total

Bidder Name	OFFICE DEPOT INC	ELECTRONIC RECYCLING CENTER INC	OUTFRONT MEDIA MIAMI LLC	FLORIDA FIRE ALARM INC
Bidder Seq#	1	2	3	4
Event Version Responded To	3	3	3	3
Bid Number	1	1	1	1
Bid Qty	0	0	0	0
Ext. Price	0.00	0.00	0.00	0.00

Factors

UOM: Ideal Bidder's Answers

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

Are you classified as a local vendor?

Are you locally headquartered?

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 0.00

5% Threshold
10% Threshold
15% Threshold

Bid Action: NA NA NA NA

Hide Bid: ☐ ☐ ☐ ☐

Recalculate **Unhide Bids** << < > >>

Save **Return to Search**

Analyze Total | Merged Files | Vendor Files

Module 7: Analyzing an Event

Module 7: Analyzing an Event Summary



Now that the lesson has been completed, users should be able to:

- View Merged Files and Vendor Files
- Review Forms and Addendum
- Analyze an Event by Aggregate
- Analyze an Event by Line
- Analyze an Event by Group
- Analyze an RFI Event

Module 8: Award a Buy Event

Module 7: Overview

At the conclusion of this lesson, the user will be able to:

- Award a Buy Event

Module 8: Award a Buy Event

Lesson 1: Introduction

After an Event has been analyzed, the Event will be awarded to the Supplier. The system will not allow posting the award until the Supplier is fully approved by Procurement and Finance.

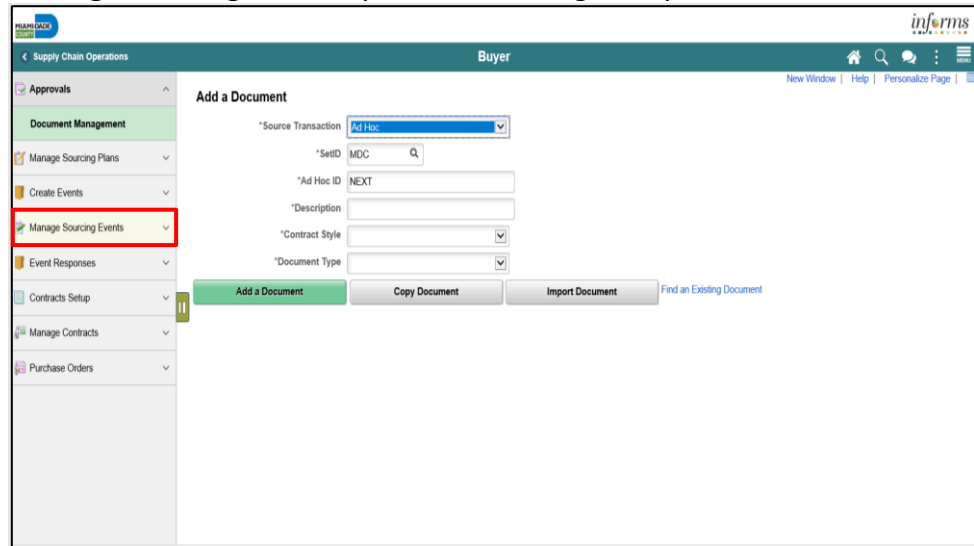
Strategic Sourcing allows for both Bidders and Suppliers to submit bids. In INFORMS, a contract and/or a purchase order can only be issued to Suppliers. In the event a Bidder is pending an award, staff are to advise the Bidders to work with the Vendor Outreach & Support Section of Procurement Department for additional guidance on how to become a fully registered Supplier.

Module 8: Award a Buy Event

Lesson 1: Award a Buy Event

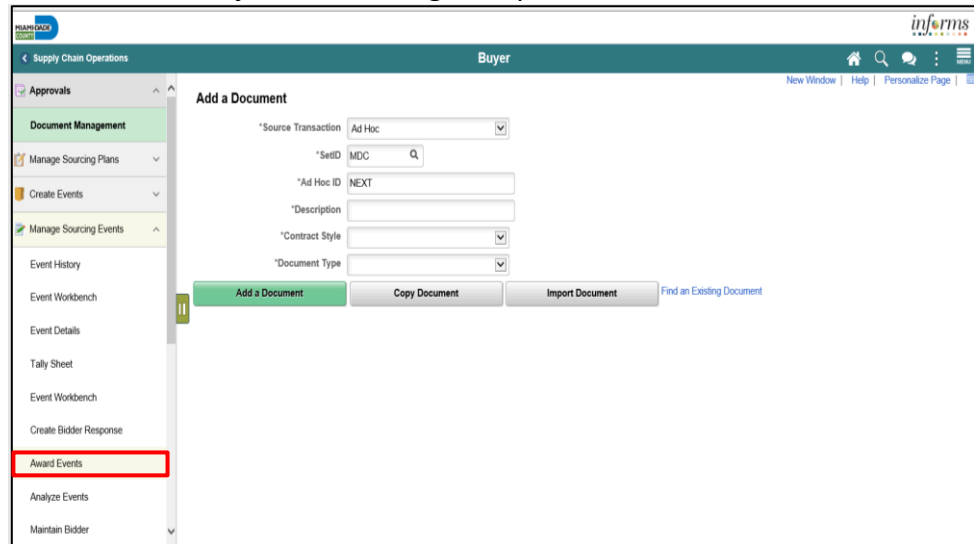
Navigate to: **Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer**

1. Select **Manage Sourcing Events** option in the navigation pane.



The screenshot shows the 'Buyer' interface with the 'Add a Document' form. The left navigation pane is expanded, and 'Manage Sourcing Events' is highlighted with a red box. The form fields include: *Source Transaction (Ad Hoc), *SellID (MDC), *Ad Hoc ID (NEXT), *Description, *Contract Style, and *Document Type. Below the form are buttons for 'Add a Document', 'Copy Document', and 'Import Document', along with a link 'Find an Existing Document'.

2. Select **Award Events** object in the navigation pane.

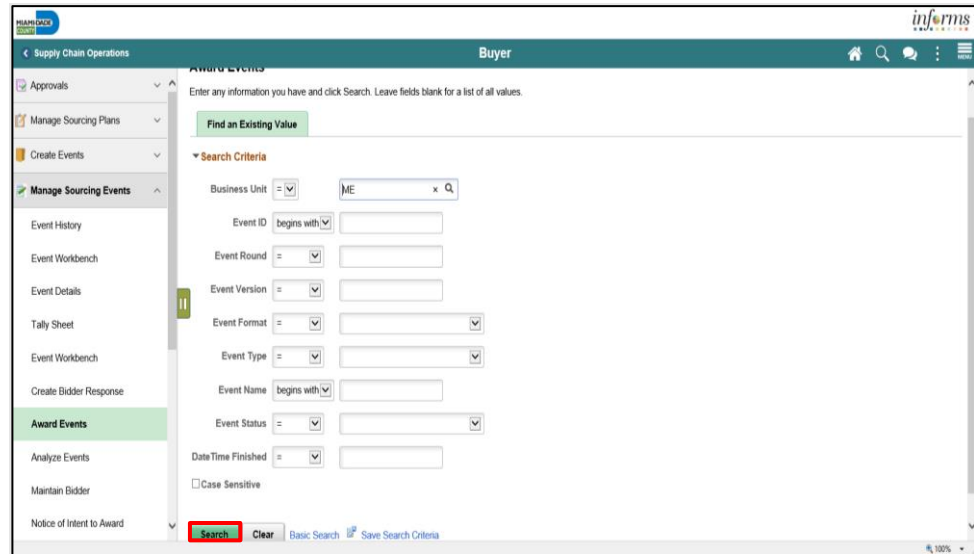


The screenshot shows the 'Buyer' interface with the 'Add a Document' form. The left navigation pane is expanded, and 'Award Events' is highlighted with a red box. The form fields are the same as in the previous screenshot. The 'Award Events' option is located under the 'Manage Sourcing Events' section in the navigation pane.

Module 8: Award a Buy Event

Lesson 1: Award a Buy Event

3. Input the applicable search parameters then select the **Search** button.



Buyer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit = ME x Q

Event ID begins with

Event Round =

Event Version =

Event Format =

Event Type =

Event Name begins with

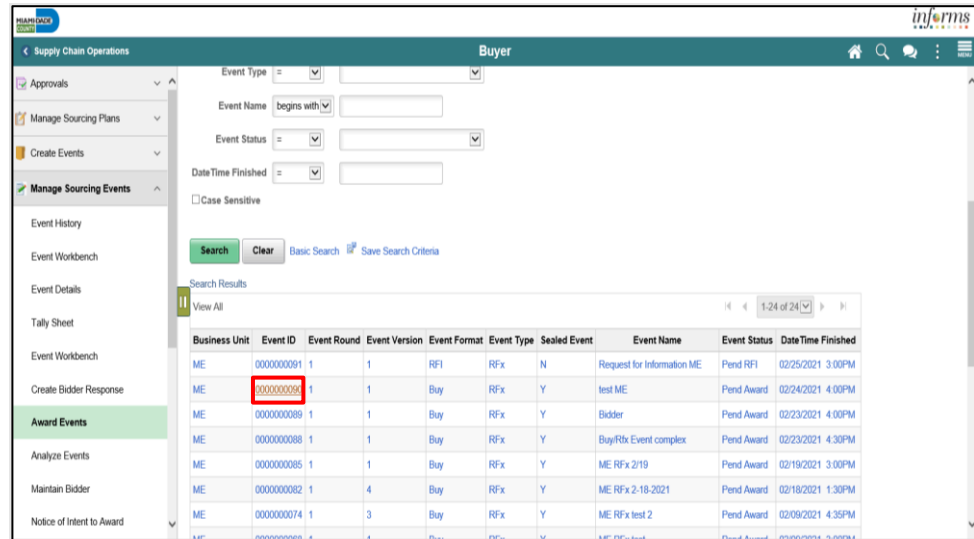
Event Status =

Date Time Finished =

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

4. Select the **Event**.



Buyer

Event Type =

Event Name begins with

Event Status =

Date Time Finished =

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All

Business Unit	Event ID	Event Round	Event Version	Event Format	Event Type	Sealed Event	Event Name	Event Status	Date Time Finished
ME	0000000091	1	1	RFI	RFx	N	Request for Information ME	Pend RFI	02/25/2021 3:00PM
ME	0000000092	1	1	Buy	RFx	Y	test ME	Pend Award	02/24/2021 4:00PM
ME	0000000089	1	1	Buy	RFx	Y	Bidder	Pend Award	02/23/2021 4:00PM
ME	0000000088	1	1	Buy	RFx	Y	Buy/Rfx Event complex	Pend Award	02/23/2021 4:30PM
ME	0000000085	1	1	Buy	RFx	Y	ME RFx 2/19	Pend Award	02/19/2021 3:00PM
ME	0000000082	1	4	Buy	RFx	Y	ME RFx 2-18-2021	Pend Award	02/18/2021 1:30PM
ME	0000000074	1	3	Buy	RFx	Y	ME RFx test 2	Pend Award	02/09/2021 4:35PM

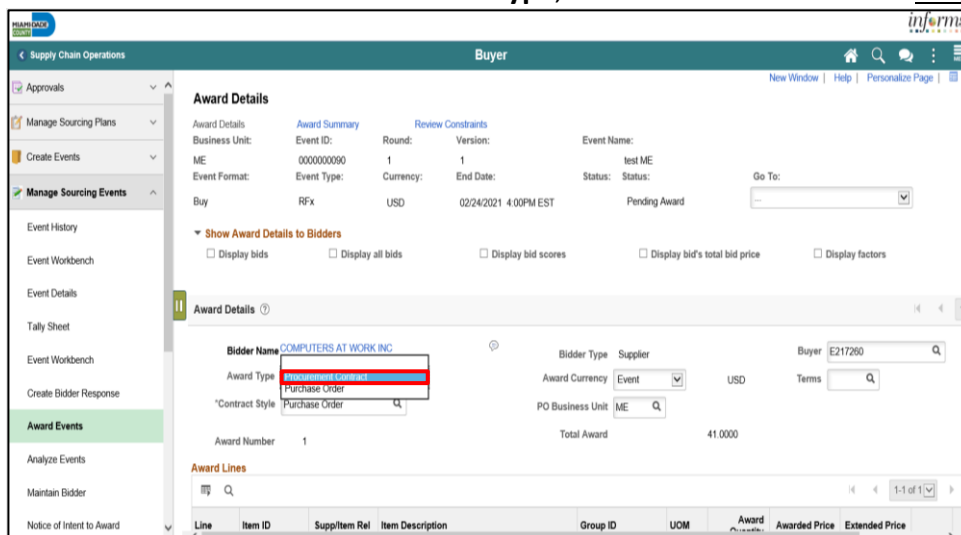
Module 8: Award a Buy Event

Lesson 1: Award a Buy Event

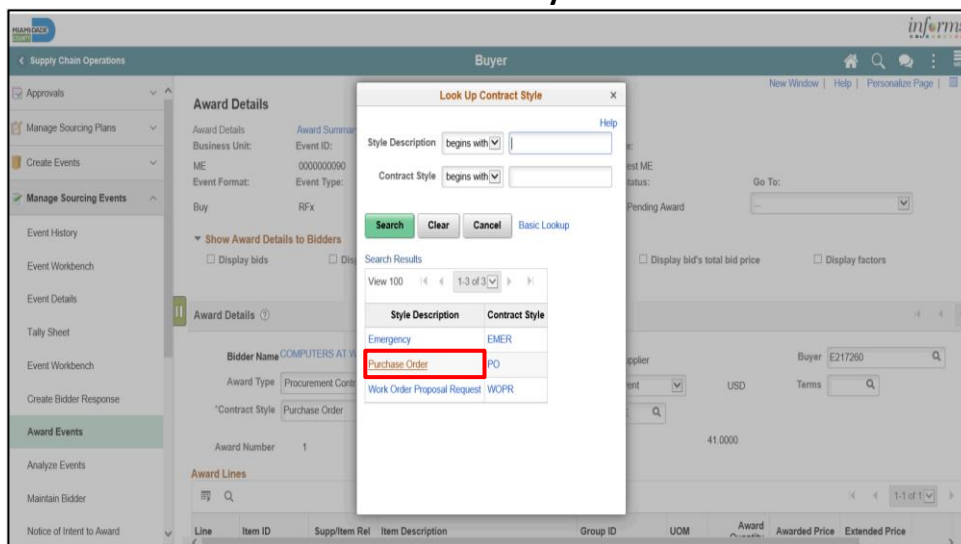
5. Select **Procurement Contract** from the **Award Type** list.

Note: This option will create a child contract that will need to be related to a parent contract.

Note: Select **Purchase Order** as the **Award Type**, for Small Purchase Orders only.



6. Select **Purchase Order** from the **Contract Style** list.

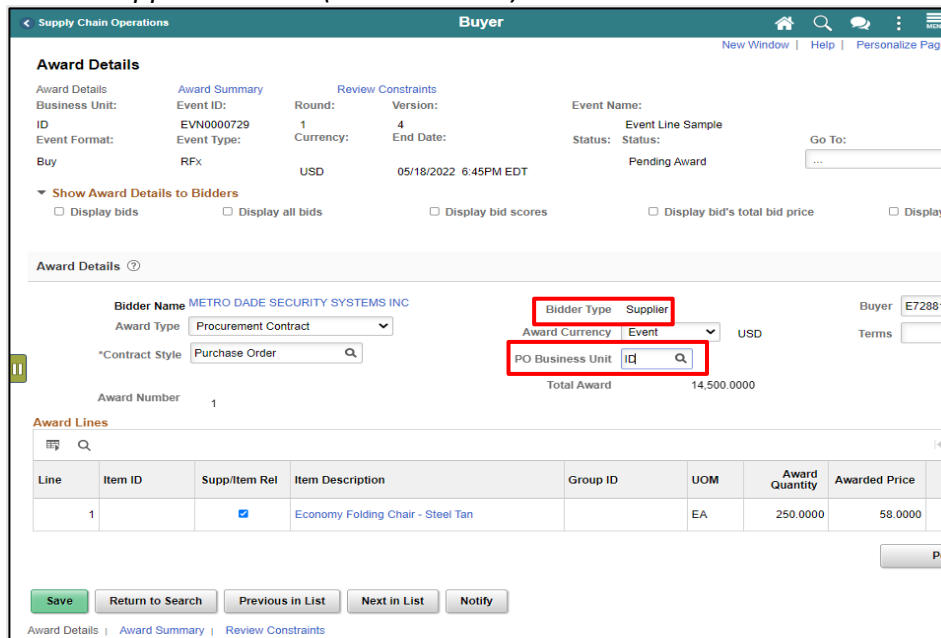


Module 8: Award a Buy Event

Lesson 1: Award a Buy Event

7. Select the desired information in the **PO Business Unit** field.

Note: The system will not allow posting of the award until the Supplier is fully approved by Procurement and Finance. The Bidder Type displays if the vendor is a Bidder or a Supplier. *For any vendor related issues, contact Procurement's Vendor Outreach and Support Services (VOSS Services).*



Award Details

Award Summary | Review Constraints

Business Unit: EVN0000729 Round: 1 Version: 4 Event Name: Pending Award

Event Format: Buy Event Type: RFX Currency: USD End Date: 05/18/2022 6:45PM EDT

Go To: ...

▼ Show Award Details to Bidders

☐ Display bids ☐ Display all bids ☐ Display bid scores ☐ Display bid's total bid price ☐ Display factors

Award Details ⓘ

Bidder Name: METRO DADE SECURITY SYSTEMS INC Bidder Type: Supplier Buyer: E72881

Award Type: Procurement Contract Award Currency: Event USD Terms: ...

*Contract Style: Purchase Order PO Business Unit: ID Total Award: 14,500.0000

Award Number: 1

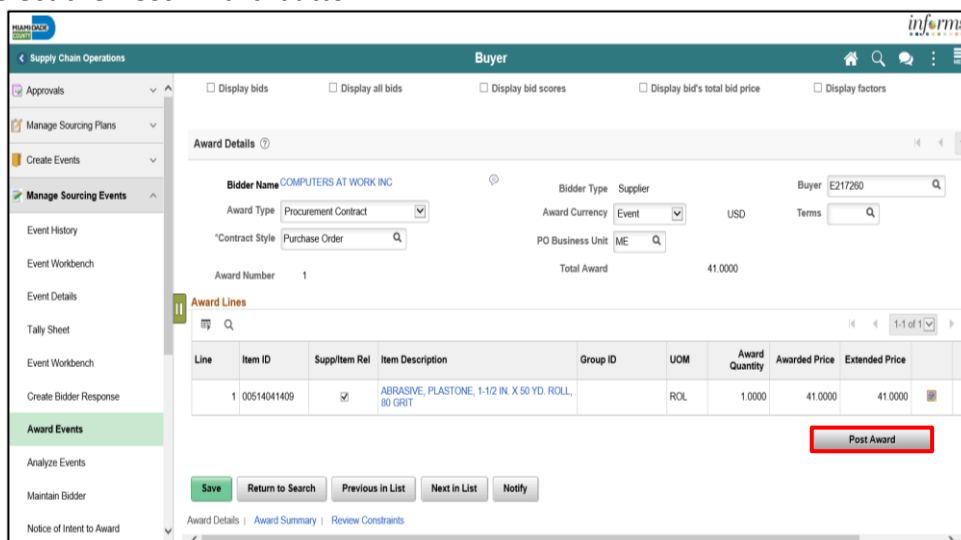
Award Lines

Line	Item ID	Supp/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price
1		<input checked="" type="checkbox"/>	Economy Folding Chair - Steel Tan		EA	250.0000	58.0000

Save Return to Search Previous in List Next in List Notify

Award Details | Award Summary | Review Constraints

8. Select the **Post Award** button.



Award Details

Approvals | Manage Sourcing Plans | Create Events | Manage Sourcing Events

Event History | Event Workbench | Event Details | Tally Sheet | Event Workbench | Create Bidder Response | Award Events | Analyze Events | Maintain Bidder | Notice of Intent to Award

☐ Display bids ☐ Display all bids ☐ Display bid scores ☐ Display bid's total bid price ☐ Display factors

Award Details ⓘ

Bidder Name: COMPUTERS AT WORK INC Bidder Type: Supplier Buyer: E217260

Award Type: Procurement Contract Award Currency: Event USD Terms: ...

*Contract Style: Purchase Order PO Business Unit: ME Total Award: 41.0000

Award Number: 1

Award Lines

Line	Item ID	Supp/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price
1	00514041409	<input checked="" type="checkbox"/>	ABRASIVE, PLASTONE, 1-1/2 IN X 36 YD. ROLL, 80 GRIT		ROL	1.0000	41.0000	41.0000

Post Award

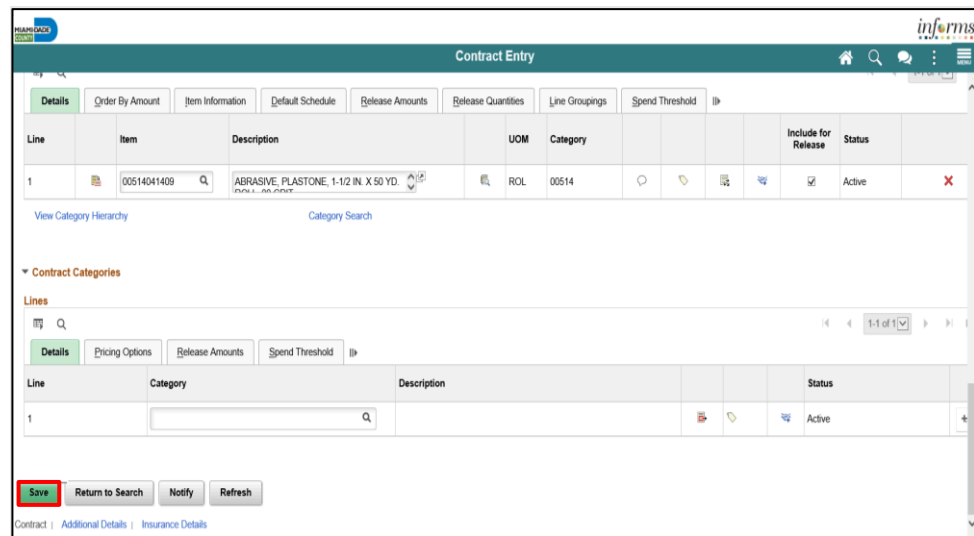
Save Return to Search Previous in List Next in List Notify

Award Details | Award Summary | Review Constraints

Module 8: Award a Buy Event

Lesson 1: Award a Buy Event

9. Select the **Save** button.



The screenshot shows the 'Contract Entry' interface. At the top, there are tabs for 'Details', 'Order By Amount', 'Item Information', 'Default Schedule', 'Release Amounts', 'Release Quantities', 'Line Groupings', and 'Spend Threshold'. The 'Details' tab is active. Below the tabs is a table with columns: Line, Item, Description, UOM, Category, Include for Release, and Status. The first row shows Line 1, Item 00514041409, Description ABRASIVE, PLASTONE, 1-1/2 IN. X 50 YD., UOM ROL, Category 00514, and Status Active. Below the table are links for 'View Category Hierarchy' and 'Category Search'. There is a section for 'Contract Categories' with a 'Lines' subsection. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', and 'Refresh'. The 'Save' button is highlighted with a red box.

Once the post award button is selected, a Child Contract is created. There are specific areas of the Contract that a Buyer must update after the Contract is created.

Note: This is specific to Contracts created via Awarded Sourcing events.

1. Uncheck the Corporate Contract checkbox
2. Add the Business Units in the Contract Control Section
3. Update the Purchase Order BU defaults
4. Remove the maximum amount that is populated automatically on the contract
5. Update the Release Quantities, if necessary.
6. Associate the child contract to the Parent (GMS) contract.

Module 8: Award a Buy Event

Lesson 2: Change Event Status to Not Awarded

There are times when an event cannot be awarded, and the status must be changed to Not Awarded.

Below are instances that may require the Buyer to update the lines and/or groups if an event to reflect the current status from pending award to not awarded.

- Bids received are over the estimated budget or funds have been allocated to a different project.
- Goods/services requested through event are no longer necessary, items are obsolete, etc.; in more detail, pursuant to Miami-Dade County General Terms and Conditions sub-section 1.5, Award of a Solicitation, Bids may be awarded to the responsible Bidder meeting all requirements as set forth in the Solicitation. The County reserves the right to reject all Bids, to waive irregularities or technicalities and to re-advertise for all or any part of this Solicitation, as deemed in its best interest. The County shall be the sole judge of its best interest.
- Resoliciting of the goods/service is needed, i.e., change of scope is not addressed on the current solicitation and warrants a new solicitation.
- No bids received.
- Bids received are deemed non-responsible.
- Partially awarding an event.

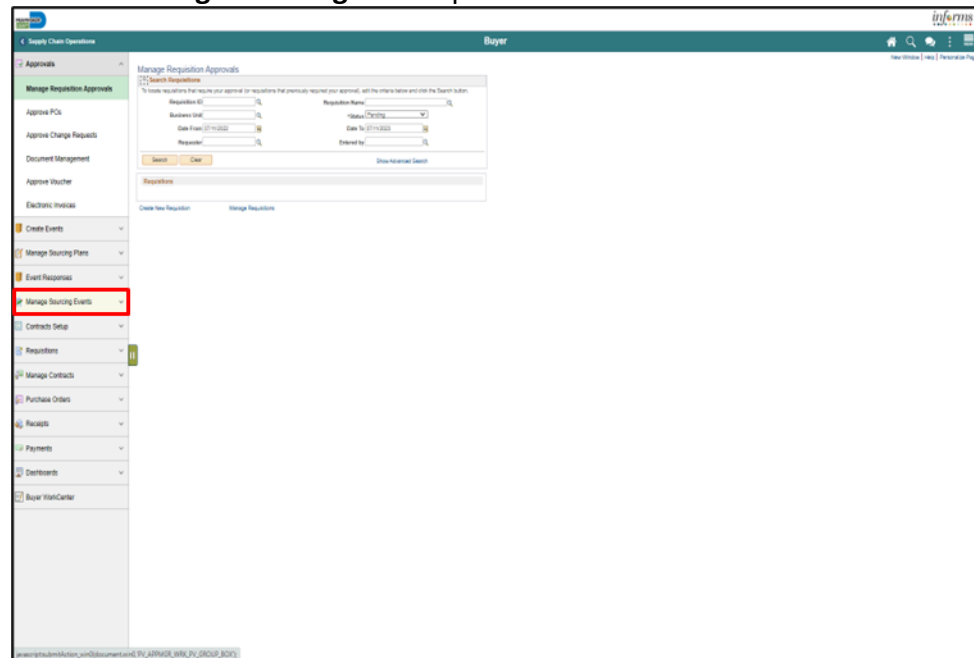
Closing the lines/groups to not awarded will allow the Buyers of an event to resolicit under a new event particularly if the information is derived from a requisition. This information can be copied from requisition once more.

Module 8: Award a Buy Event

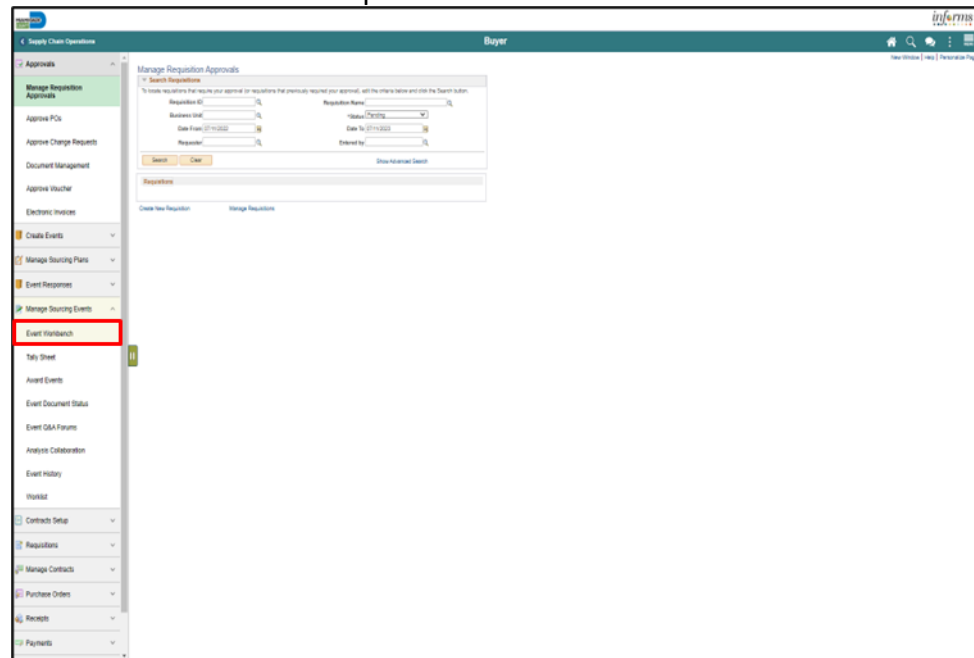
Navigate to: **Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer**

Lesson 2: Change Event Status to Not Awarded

1. Select the **Manage Sourcing Events** pane.



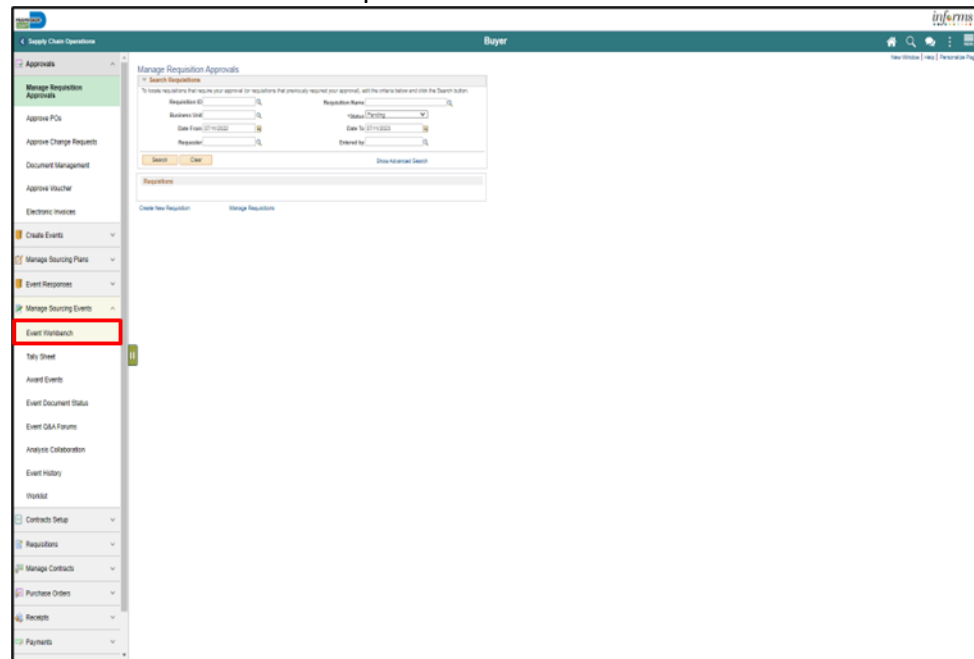
2. Select the **Event Workbench** pane.



Module 8: Award a Buy Event

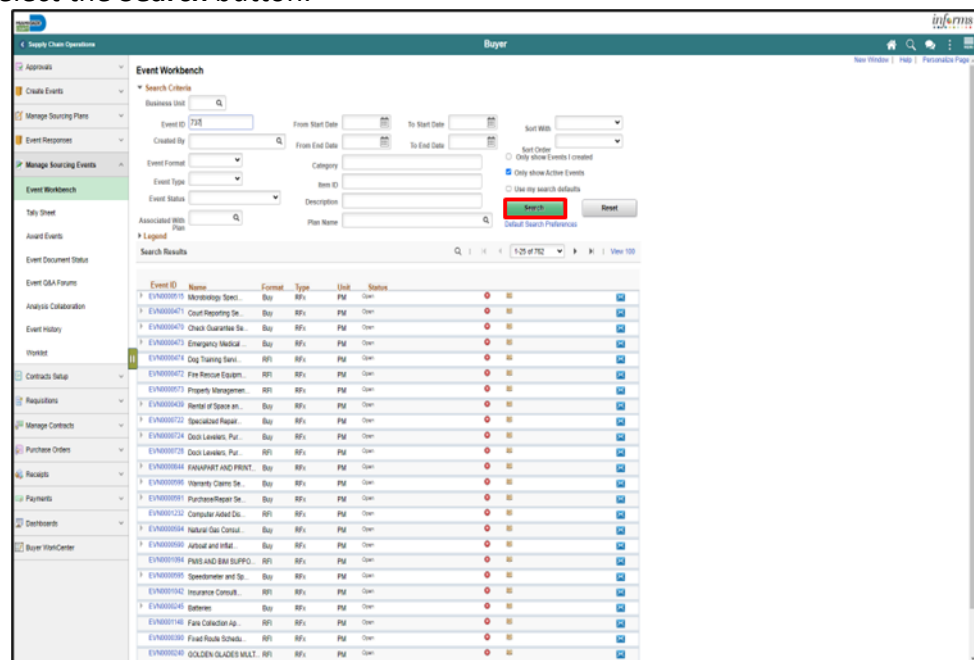
Lesson 2: Change Event Status to Not Awarded

3. Select the **Event Workbench** pane.



4. Input any applicable search parameters.

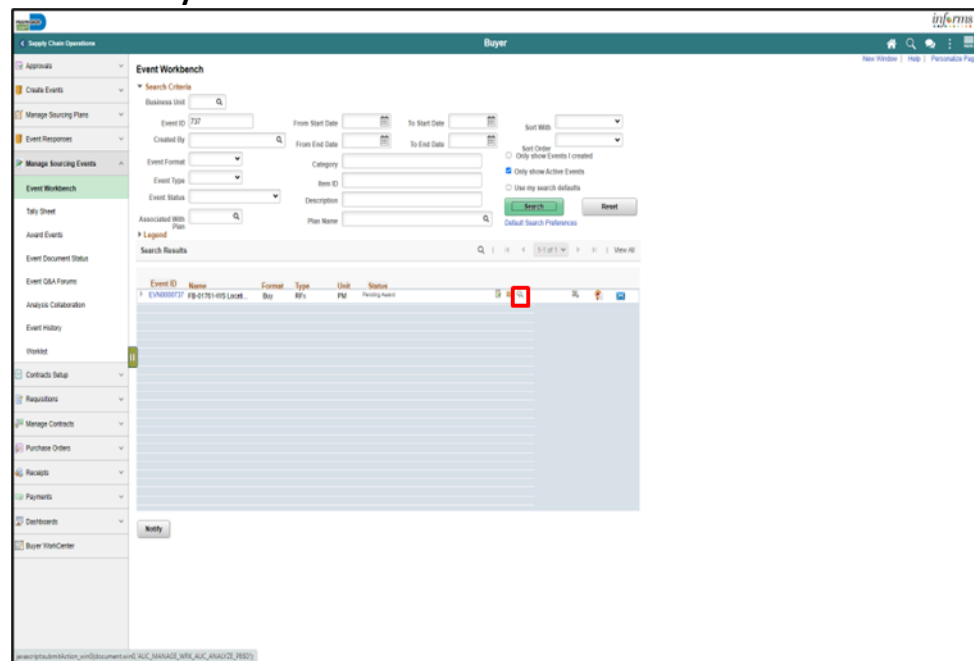
5. Select the **Search** button.



Module 8: Award a Buy Event

Lesson 2: Change Event Status to Not Awarded

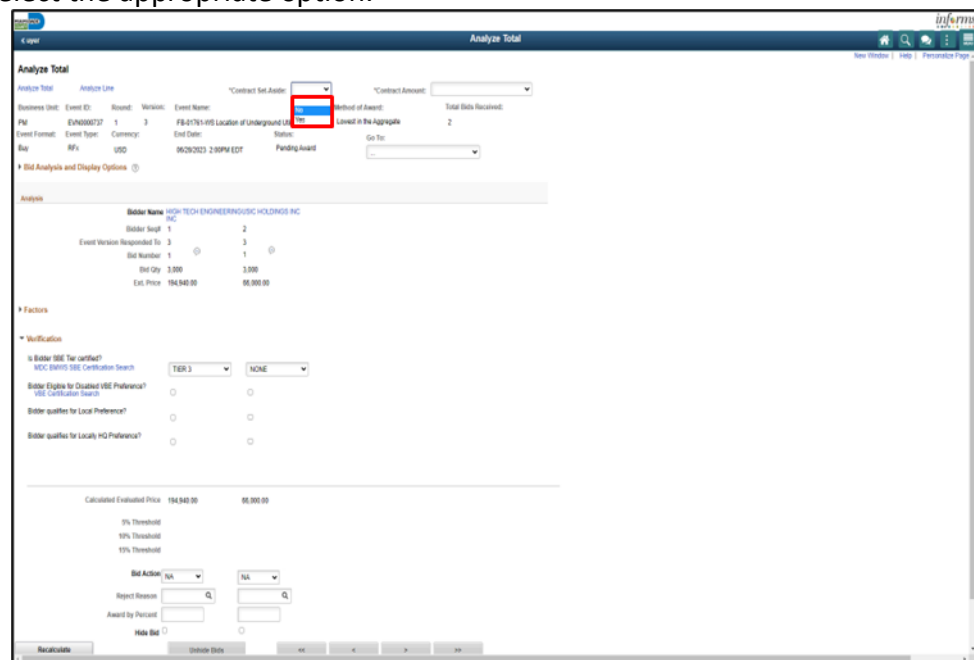
6. Select the **Analyze Bids** button.



The screenshot shows the 'Event Workbench' interface. On the left is a navigation menu with options like 'Approvals', 'Create Events', 'Manage Sourcing Plans', 'Event Responses', 'Manage Sourcing Events', 'Event Workbench', 'Tally Sheet', 'Award Events', 'Event Document Status', 'Event OSA Forms', 'Analysis Collaboration', 'Event History', 'Worklist', 'Contracts Setup', 'Requests', 'Manage Contracts', 'Purchase Orders', 'Receipts', 'Payments', 'Dashboards', and 'Buyer ViewCenter'. The main area is titled 'Event Workbench' and contains search filters and a table of results. The table has columns: Event ID, Name, Format, Type, Unit, and Status. One row is visible with Event ID 'EV0000737' and Name 'PB-01761-HIS Location of Underground U...'. A red box highlights the 'Analyze Bids' button in the action column of this row.

7. Select the **Contract Set-Aside** list item.

8. Select the appropriate option.

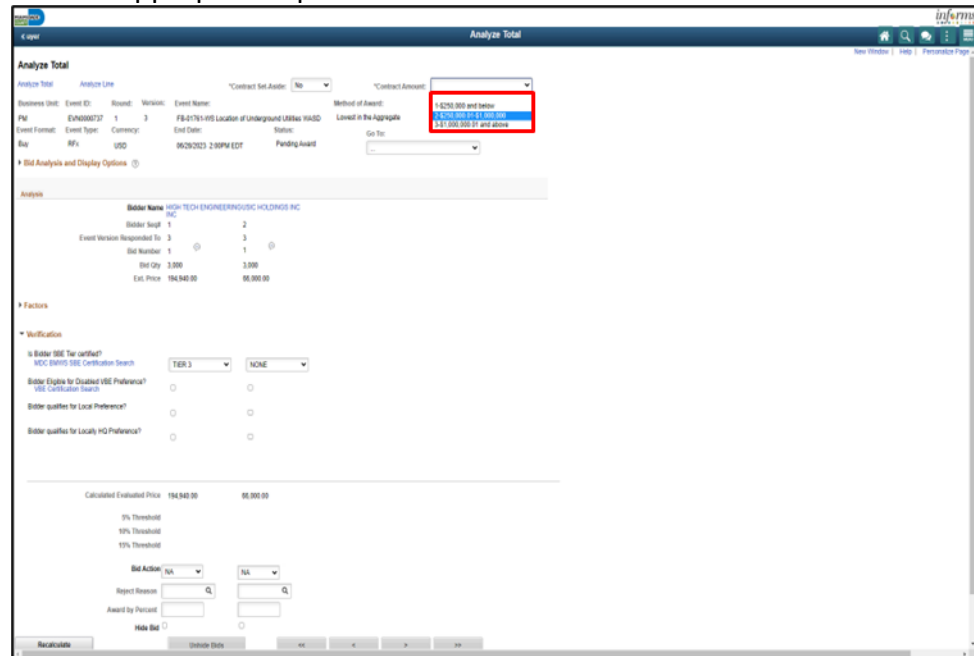


The screenshot shows the 'Analyze Total' interface. It displays various fields for event analysis, including 'Business Unit', 'Event ID', 'Round', 'Version', 'Event Name', 'Contract Set-Aside', 'Contract Amount', 'Method of Award', and 'Total Bids Received'. The 'Contract Set-Aside' dropdown is highlighted with a red box, showing 'Yes' as the selected option. Below this, there are sections for 'Bid Analysis and Display Options', 'Analysis', 'Factors', and 'Verification'. The 'Analysis' section shows details for Bidder Name 'HIGH TECH ENGINEERING HOLDINGS INC' and Bidder Size '1'. The 'Factors' section includes checkboxes for 'Is Bidder SME Tier certified?', 'Bidder Eligible for Qualified VBE Preference?', 'Bidder qualifies for Local Preference?', and 'Bidder qualifies for Locally HQ Preference?'. The 'Verification' section includes a 'Calculated Evaluated Price' of 194,940.00 and 98,990.00, and a 'Bid Action' dropdown set to 'NA'.

Module 8: Award a Buy Event

Lesson 2: Change Event Status to Not Awarded

9. Select the **Contract Amount** list item.
10. Select the appropriate option.



Analyze Total

Business Unit: Event ID: Round: Version: Event Name: Method of Award: Total Bids Received:

PM: ERM000737 1 3 PB-0761-RS Location of Underground Utilities VASD Lowest in the Aggregate 2

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

Buy RFA USD 06/26/2023 2:00PM EDT Pending Award

Analyze

Bidder Name: HIGH TECH ENGINEERING & CONSTRUCTION INC

Bidder Seq: 1 2

Event Version Responded To: 3 3

Bid Number: 1 1

Est Qty: 3,000 3,000

Est Price: 194,940.00 66,000.00

Factors

Verification

Is Bidder SME Tier certified? NDC BANTU SME Certification Search TIER 1 NONE

Bidder Eligible for Disabled VBE Preference? VBE Certification Search

Bidder qualifies for Local Preference?

Bidder qualifies for Locally HQ Preference?

Calculated Evaluated Price: 194,940.00 66,000.00

5% Threshold

10% Threshold

15% Threshold

Bid Action: NA NA

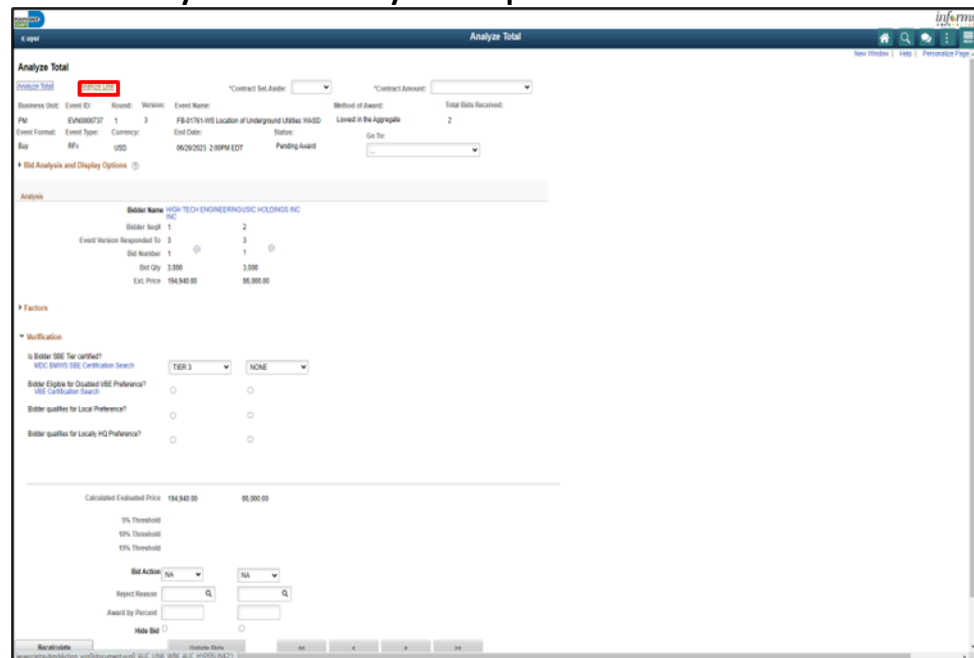
Reject Reason: Q

Award by Percent:

Hide Bid

Recalculate Update Bids

11. Select the **Analyze Line** or **Analyze Group** link.



Analyze Total

Business Unit: Event ID: Round: Version: Event Name: Method of Award: Total Bids Received:

PM: ERM000737 1 3 PB-0761-RS Location of Underground Utilities VASD Lowest in the Aggregate 2

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

Buy RFA USD 06/26/2023 2:00PM EDT Pending Award

Analyze

Bidder Name: HIGH TECH ENGINEERING & CONSTRUCTION INC

Bidder Seq: 1 2

Event Version Responded To: 3 3

Bid Number: 1 1

Est Qty: 3,000 3,000

Est Price: 194,940.00 66,000.00

Factors

Verification

Is Bidder SME Tier certified? NDC BANTU SME Certification Search TIER 1 NONE

Bidder Eligible for Disabled VBE Preference? VBE Certification Search

Bidder qualifies for Local Preference?

Bidder qualifies for Locally HQ Preference?

Calculated Evaluated Price: 194,940.00 66,000.00

5% Threshold

10% Threshold

15% Threshold

Bid Action: NA NA

Reject Reason: Q

Award by Percent:

Hide Bid

Recalculate Update Bids

Lesson 2: Change Event Status to Not Awarded

14. Repeat steps line 12-13 for all lines or groups as applicable.
15. Select the **Save** button.
- Note: After selecting the **Save** button, the status changes to **Not Awarded**.

Analyze Line

Business Unit: ANALYZE LINE		Event ID: 1	Version: 1	Event Name: SAMPLE EVENT	Method of Award: Lined in the Aggregate	Total Bids Received: 1
ID: EVN0001590	Event Type: RFV	Currency: USD	End Date: 09/11/2023 2:39PM EDT	Status: Not Awarded	Go To: <input type="text"/>	

Line Items

Line	Item ID	Description	Category	UCM	Start Price	Requested Qty	Qty Awarded	Line Status	Analyze	
1		Adult Non-Renewable with CD tating and Renewal bag / Sample Item # Hudson 1099 http://www.gemad.com/consumables-1099.asp-main-orogen-non-renewing-adultes-10-secs-CD per case ""Substitutes are accepted upon approval""	B	47545	CS	1.00000	1.0000	0.0000	Closed	Analyze
2		Tweeters Silver 3 1/4 x 1 1/4 Stainless Steel, Coated Baffle End / Sample # Chicago Item 39F046 ""Substitutes are accepted upon approval""	B	99599	EA	1.00000	36.0000	0.0000	Closed	Analyze
3		Elast Backboard Adult Size - Yellow / Sample Item # Henry Schein ASD 47271 ""Substitutes are accepted upon approval""	B	89530	EA	1.00000	2.0000	0.0000	Closed	Analyze
4		Mondrel SEC 375x (Boi Supreme EC Exam Gloves, White Extended Cut, FF, Latex-Free, Textured Fingers, Blue Large Palm) of 50 ""Substitutes are accepted upon approval""	B	20142	BOX	1.00000	36.0000	0.0000	Closed	Analyze

Tools Return to Search

Analyze Total : Analyze Line

Module 8: Award a Buy Event

Module 8: Award a Buy Event Summary

Now that the lesson has been completed, users should be able to:

- Award a Buy Event



Module 9: Course Summary

Course Summary The Course Summary module covers three topics:

- Course Content Summary
- Additional Training and Job Aids
- Course Evaluation

Module 9: Course Summary

Objectives Achieved

Congratulations for completing the Strategic Sourcing course! Users should be able to:

- Create an RFI Event
- Create a Buy Event
- Approve an Event
- Create Multiple Versions of Sourcing Events
- View Event Q&A Forum
- Navigate through the e-Supplier Portal
- Analyze an Event
- Award a Buy Event

Module 9: Course Summary

Additional Training and Job Aids

Other training courses that may be eligible to take, based on the roles assigned, include:

- SCM 201- Manage and Record Requisitions
- SCM 202- Manage and Record Purchase Orders
- SCM 205- Departmental Supplier Contract Management

The following resources are also available:

Job Aids

- Create a New RFI Event
- Create a New Buy Event
- Attach an RFx Document
- Creating Multiple Versions of Sourcing Events
- View Event Q&A Forum
- View Merged Files and Vendor Files
- Review Forms and Addendum
- Analyzing a Buy Event by Aggregate
- Analyzing a Buy Event by Line
- Analyzing a Buy Event by Group
- Analyzing a RFI Event
- Award an Event

For additional Information, be sure to visit:

- Miamiidade.gov/informs

Module 9: Course Summary

Key Terms



The following key terms are used in this course:

Term	Definition
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. Note: The Event Preview Date and the Event Start Date should be the same.
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 INFORMS buyers. Be sure the time is set for 12:00 PM. Note: The date must be after the start date and at least 3-5 days prior to End Date .
Event End Date	The date when the bidding closes. Be sure the time is set for 2:00 PM.
Category Code	The category code associated with the Sourcing Event. Bidders or Suppliers will be searched based on the associated categorization.
Send to Bidder	Select to enable the Bidder to see the comment.
Include on Award	Select to enable the comments to appear on the contract or purchase order award.
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 this attachment is to be available to Bidders.
Include on Award	Select this check box if an attachment is to be included with the award.

Module 9: Course Summary

Key Terms



The following key terms are used in this course:

Term	Definition
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. Note: The Event Preview Date and the Event Start Date should be the same.
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 INFORMS buyers. Be sure the time is set for 12:00 PM. Note: The date must be after the start date and at least 3-5 days prior to End Date .
Event End Date	The date when the bidding closes. Be sure the time is set for 2:00 PM.
Send to Bidder (Comments)	Select to enable the Bidder to see the comment.
Display to Bidder (Attachment)	Select this check box if this attachment is to be available to Bidders and part of the Bid Packet pdf file.
Generate Bid Event Packet	Select this to run the process to generate the Bid Packet. All event attachments, marked Display to Bidder, are merged into a .pdf file format.
Create New Version	Select this icon to prompt changes to an event. The new version will allow event changes to line items, event dates, and attachments, etc.
Generate Bid Event Packet	Select this to run the process to generate the Bid Packet. All event attachments, marked Display to Bidder, are merged into a .pdf file format.

Module 9: Course Summary

Key Terms



The following key terms are used in this course:

Term	Definition
Q&A Forum	Forum available to communicate questions and comments related to a specific event.
Analyze by Aggregate	Analyzing all pricing submitted by all bidders for all lines in the aggregate. Review each bidder's bid for the total of all the items in an event.
Analyze by Line	Analyzing pricing submitted by all bidders on a line-by-line basis. Review each bidder's bid for each line item in the event.
Analyze by Group	Analyzing pricing submitted by all bidders on a group-by-group basis. Review each bidder's bid for each group in the event.
Tally Sheet	An excel spreadsheet produced by the system from the date on the analyze page reflecting all pricing submitted by bidders and calculations based on bid factors. Excel document listing the details of the bids received, Bidders information, and sum of the lines, groups of the events.
Contract Set-Aside	A contract that is set-aside for award only to Miami-Dade certified Small Business Enterprise (SBE) firms.
SBE Tier	Tier 1 Tier 2 Tier 3 Tier 4
VBE Preference	A contract preference afforded to local, certified Veteran-Owned Business Enterprises (VBE). VBE's are certified by the State of Florida. A preference of 5% is deducted from a certified VBE when evaluating prices submitted against non VBE firms. If a VBE firm is also a certified SBE firm, the preferences do not aggregate, only the higher preference is applied.
Local Preference	A preference is afforded to firms meeting the criteria of a local business as detailed in 2-8.5 of the Miami-Dade Code of Ordinances.

Module 9: Course Summary

Key Terms



The following key terms are used in this course:

Term	Definition
Locally HQ Preference	A preference afforded to firms meeting the criteria of a locally headquartered business as detailed in 2-8.5 of the Miami-Dade Code of Ordinances.
Threshold	<p>5% - the threshold between any local low bidder's price and any locally headquartered bidder's price in order to initiate a request to submit a Best and Final offer (BAFO) from the affected bidders</p> <p>10% - the threshold between any non-local low bidder's price and any local bidder's price in order to initiate a request to submit a Best and Final offer (BAFO) from the affected the bidders</p> <p>15% - the threshold between any non-local low bidder's price and any locally headquartered bidder's price in order to initiate a request to submit a Best and Final offer (BAFO) from the affected bidders</p>
Bid Summary	<p>A system generated report sent to bidders upon submittal of a bid listing the pricing, answers to bid factor questions, documents submitted by the bidder, and the date/time the of the bid submittal.</p> <p>A system generated file that gives a summary of what was submitted.</p>
Vendor Files	<p>All files uploaded by a bidder when submitting a bid.</p> <p>Vendor files are the individual files that were uploaded by the bidder.</p>
Merged Files	<p>Merged documents in PDF format consisting of all documents uploaded by buyers as well as bidder on an event. There are three types of merged documents, the Solicitation Package, containing all documents attached to a sourcing event by the buyer, a PDF document containing all documents uploaded by each bidder on an event, and a Tabulation Package, consisting off all documents uploaded by the buyer as well as all documents uploaded by all bidders on an event.</p> <p>Combined PDF documents pertaining to the event which include solicitation, tabulation, and bid proposal packets.</p>