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

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:

Roles and Responsibilities

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

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

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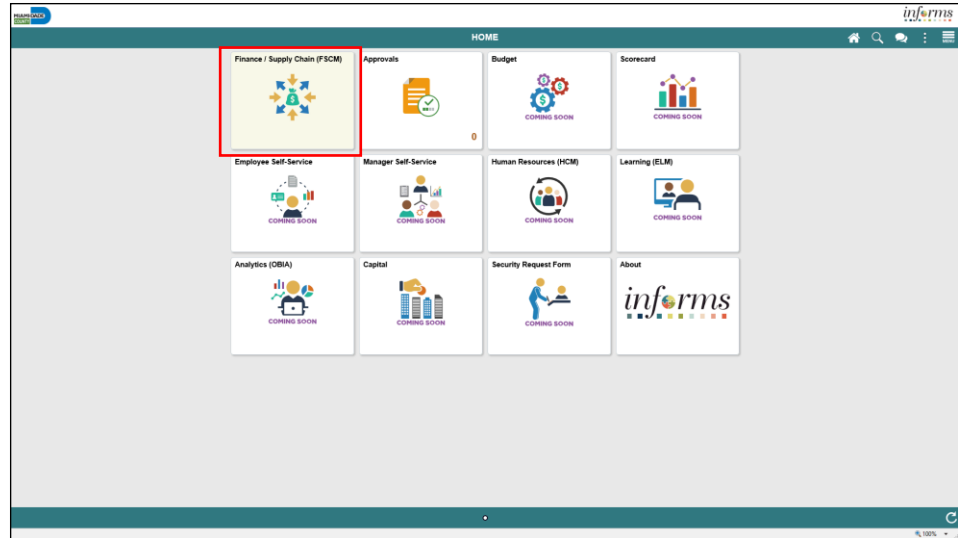
2. Select the **Supply Chain Operations** tile.

3. Select the **Buyer** tile.
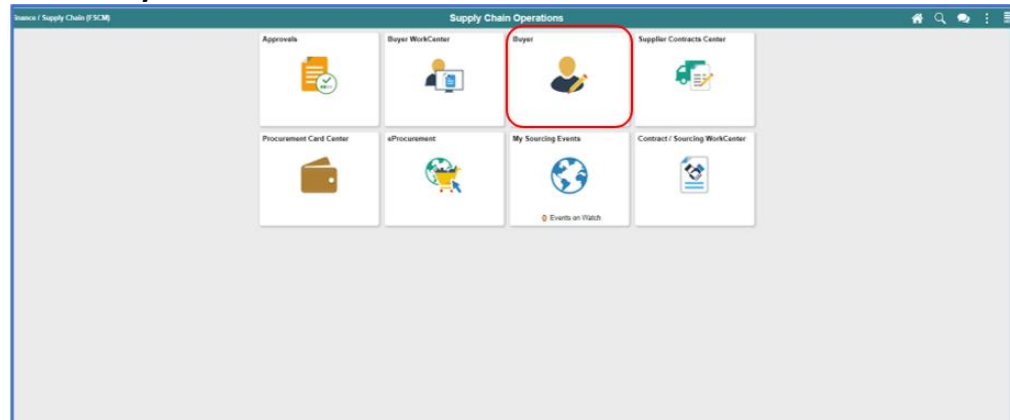
Module 1: Course Introduction

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

PROCURE TO PAY
Business Process

1. REQUISITIONS
(Central/Department)
- Add items and categories
- Enter chart fields
- Approval Workflow
- Budget Check
- Source (Purchase Order/Sourcing Event)

Department Requisition Processor
Processor role responsible for the entry and update of requisitions, including close/cancel/amend actions.

Requisition Approvers
Approves Requisitions based on any of the following criteria: - Supervisor, Dollar Amount Commodity Code, Funding Source.

2. SOURCING EVENT
(Central/Department)
- Post Event
- Received Bids
- Review Tally
- Award Suppliers
- (PO Contract)

Strategic Sourcing Buyer
Buyer role responsible for creating, analyzing, and awarding events.

Strategic Sourcing Event Approver
Approver role responsible for approving or denying events.

3. CONTRACT
(Department)
- Create Group Multi-Supplier Contract
- Manage Allocation
- Create Purchasing Contract

Department Contract Administrator
Administrator role responsible for creating, amending, deleting, and inactivating supplier contracts.

Procurement Manager
Manager role responsible for reviewing and approving a purchasing contract or a general contract.

4. PURCHASE ORDER
(Central/Department)
- Copy from Contract or Requisition
- Approve PO
- Budget Check
- Dispatch to Supplier

Department Buyer
Buyer role responsible for the creation, maintenance and change of purchase orders.

Purchase Order Approvers
Approves Purchase Orders based on any of the following criteria: - Supervisor, Dollar Amount Commodity Code, Funding Source.

Retainage Maintainer
Maintainer role responsible for maintaining the retainage percentage and/or amount.

5. RECEIPT
(Department)
- Copy from Purchase Order
- Acknowledge receipt of items
- Enter Capital Asset information

Department Receiving Processor
Processor role responsible for the creation of receipts.

6. VOUCHER
(Department / Central Finance)
- Matching (2-3vray)
- Budget Check
- Approvals
- Payment

Department Approver 1
Approves vouchers through workflow. The users will be pooled by Business Unit and defined by the role configuration.

AP Retainage Administrator
Transacts on the custom retainage supplier page. This role has the ability to initiate adjustment vouchers from the supplier page.

AP Retainage Inquiry
Inquires on retainage balances by business unit, supplier, and PO ID. This gives users access to the custom retainage supplier page (view only).

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

Navigate to: **Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer**
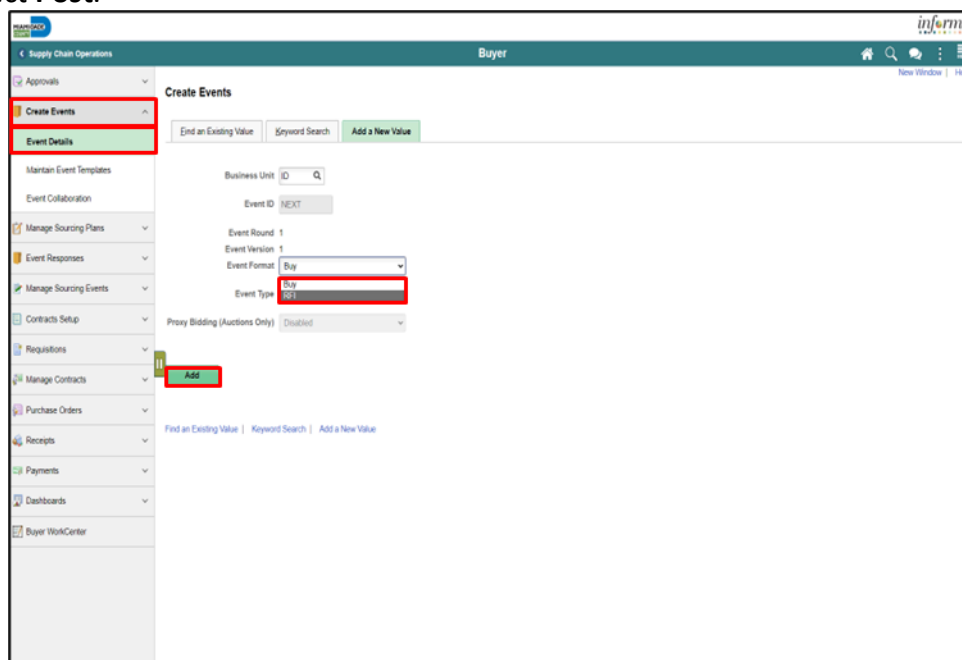
When creating a new event:
1. Select **Create Events** in the navigation pane.
2. Select **Event Details** in the navigation pane.
3. Select **RFI** from the **Event Format** list.
4. Select the **Add** button.

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.
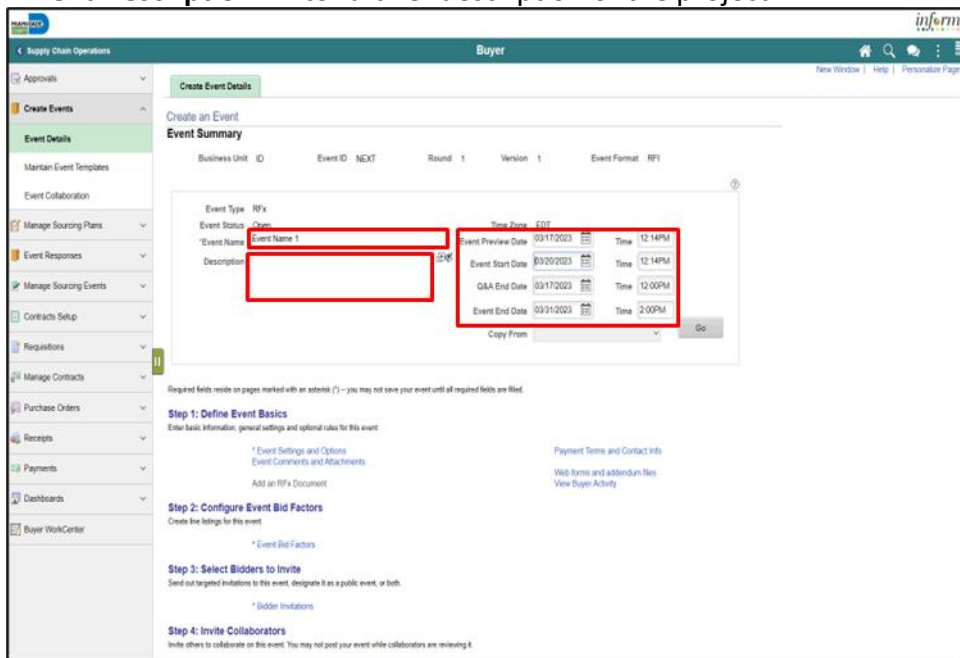
Module 2: Creating an RFI Event

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.

Module 2: 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**.**
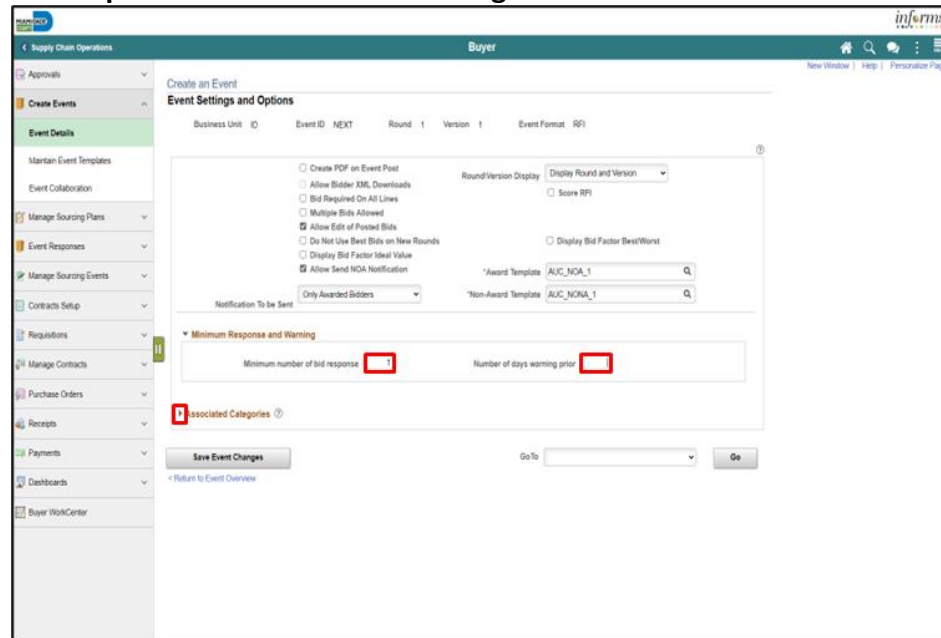
Note: This is the minimum number of bidders required to bid on the event.

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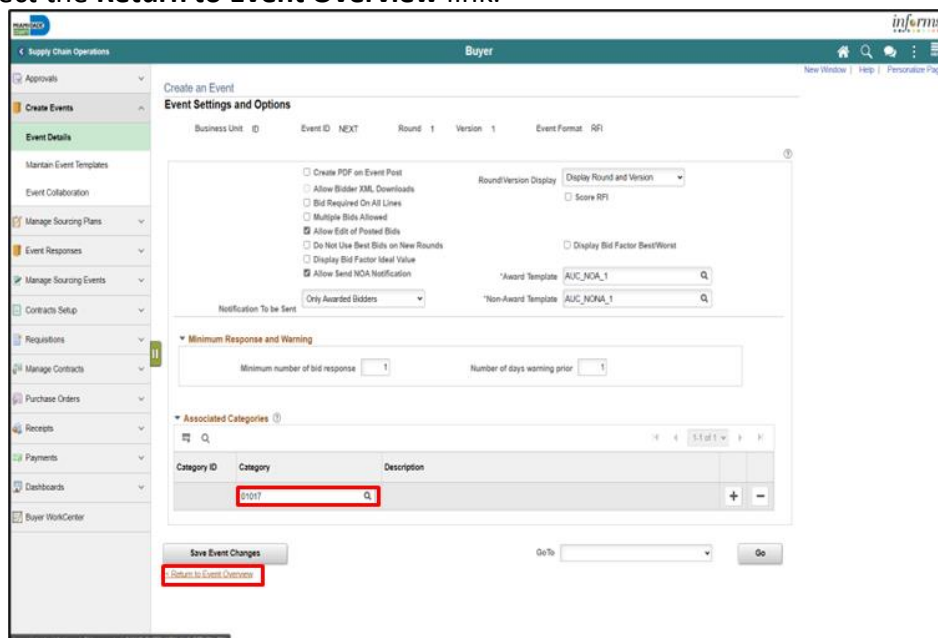
Note: Do not edit the selections in the section above.

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

12. Enter the desired information into the **Category** field.
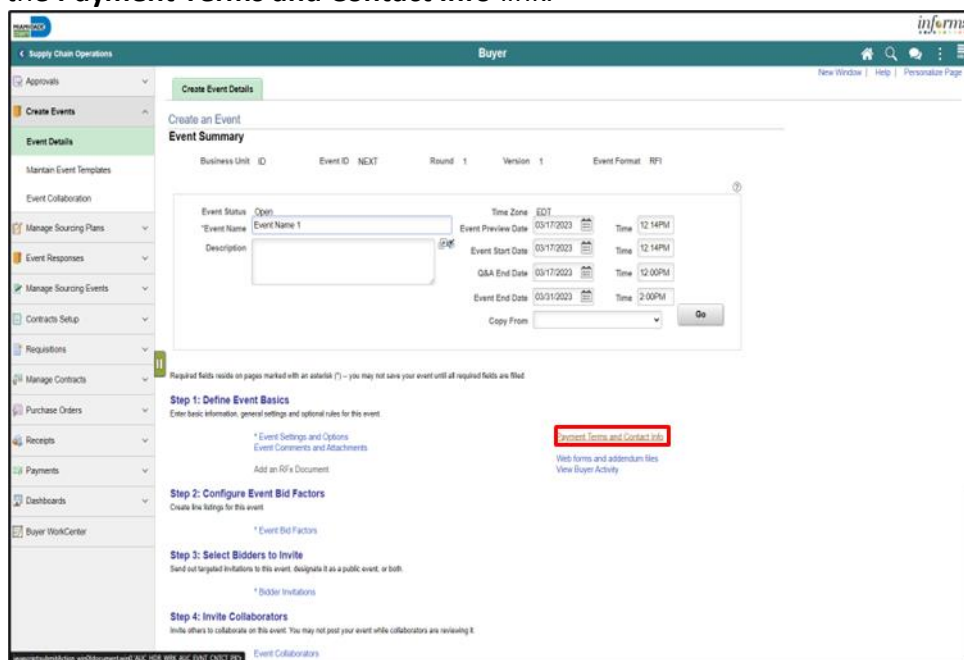
13. Select the **Return to Event Overview** link.

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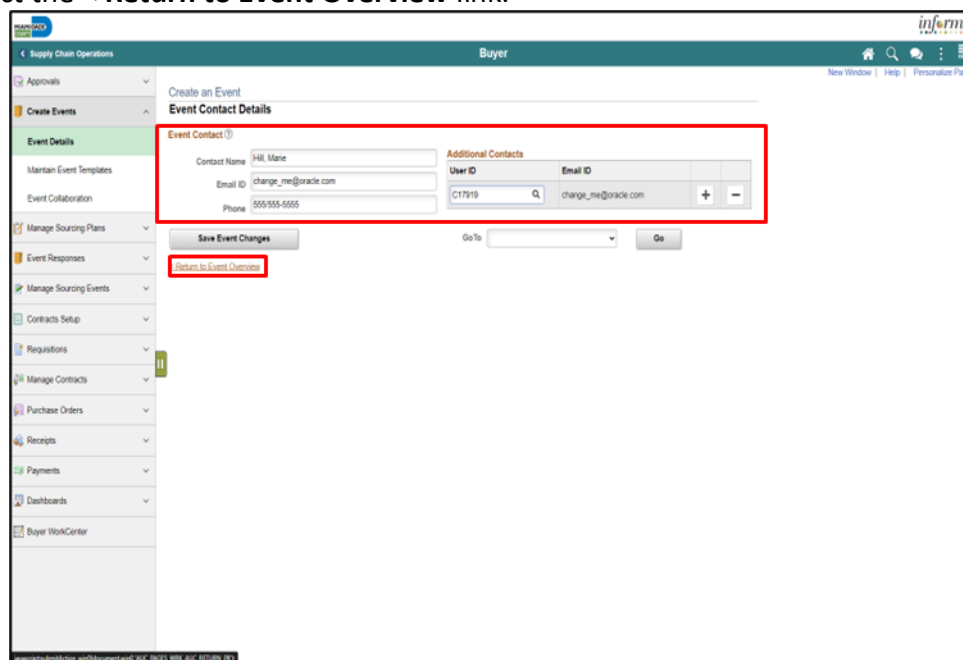
Note: If any questions are asked by bidders, the Clerk of the Board will be automatically notified. Additional contacts included in this section will also be notified of questions raised by bidders.

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

Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

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

19. Enter the desired information into the **Comments** field.   This field can be used to enter pre-bid/pre-proposal date/time information.

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

20. Select the **Add Attachment** button.
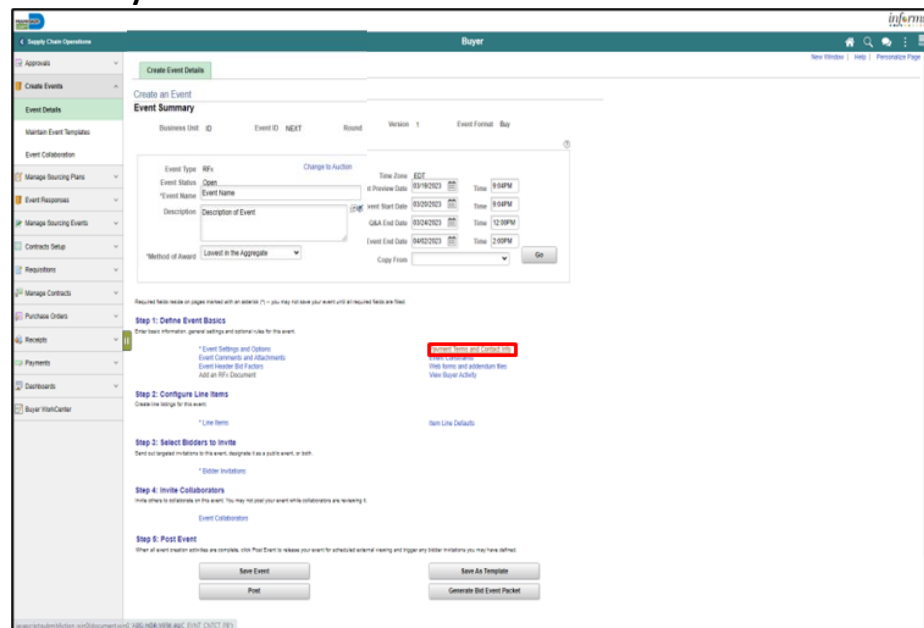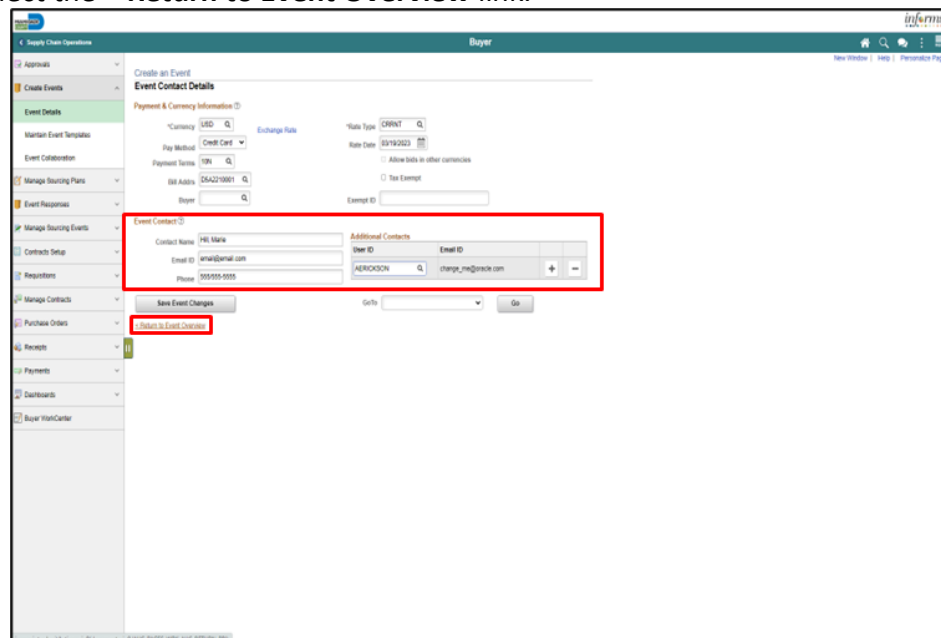   - Select the **Choose File** button.
   - Select the desired file.
   - Select the **Open** button.
   - Select the **Upload** button.

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

Note: The attachment option is available; however, it is not required. If more than one attachment is added, the **Reorder** button allows for a resequencing of the attachments.

Module 2: 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.
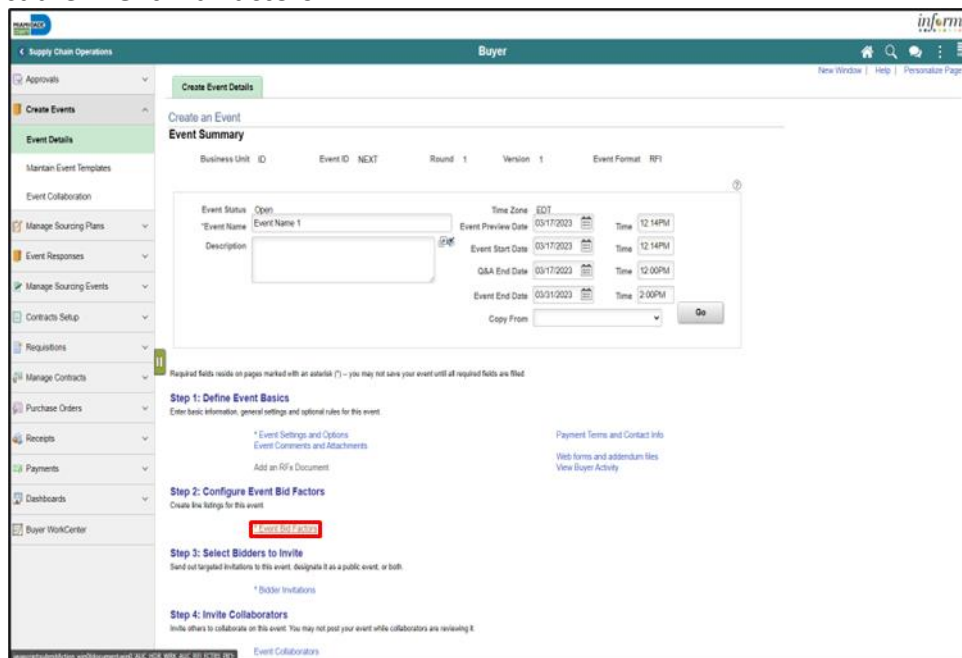
Module 2: Creating an RFI Event

Lesson 1:
Creating an RFI
Event

Step 2: Configure Event Bid Factors
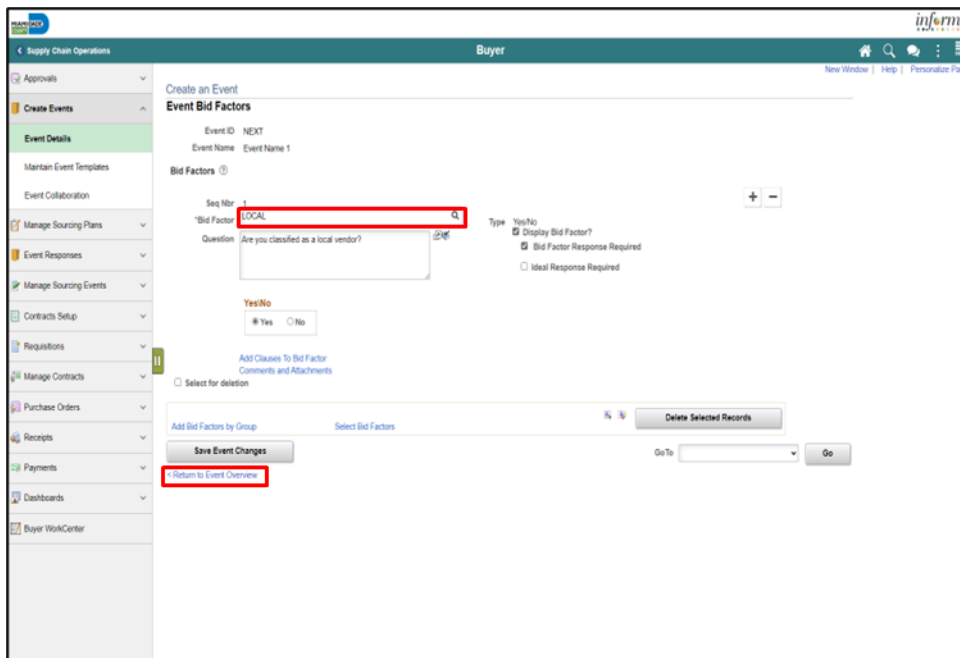
26. Select the **Event Bid Factors** link.

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.
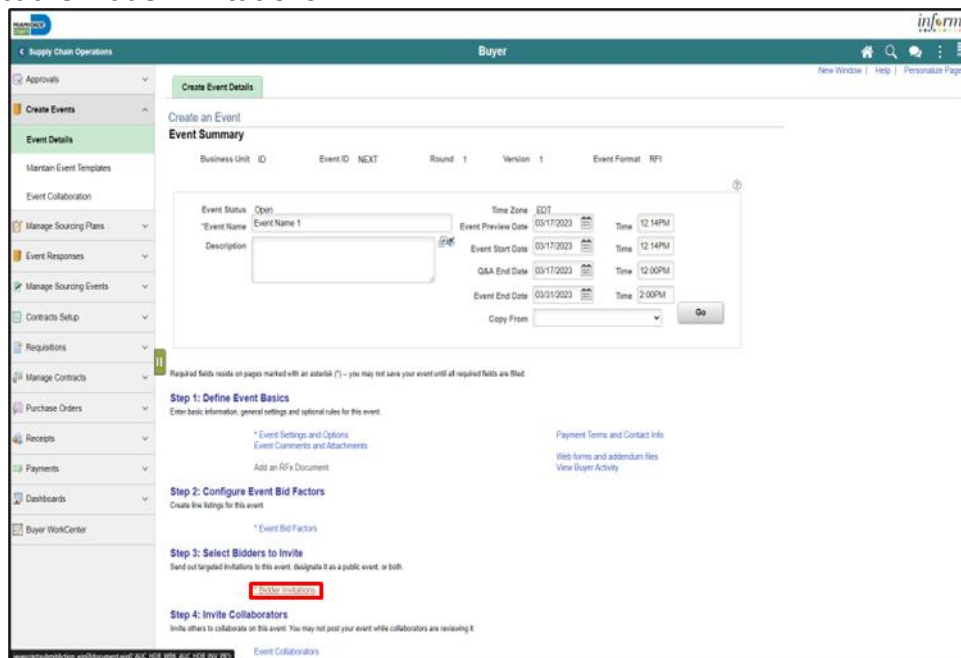
Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

Step 3: Select Bidders to Invite

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

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.
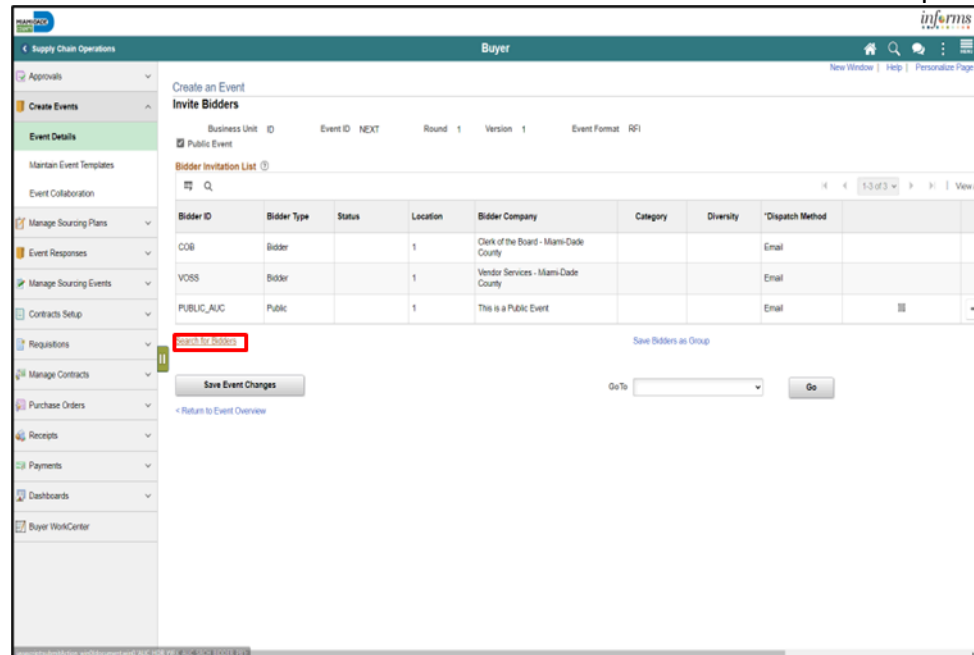
Module 2: Creating an RFI Event

32. Select the **Search for Bidders** link.
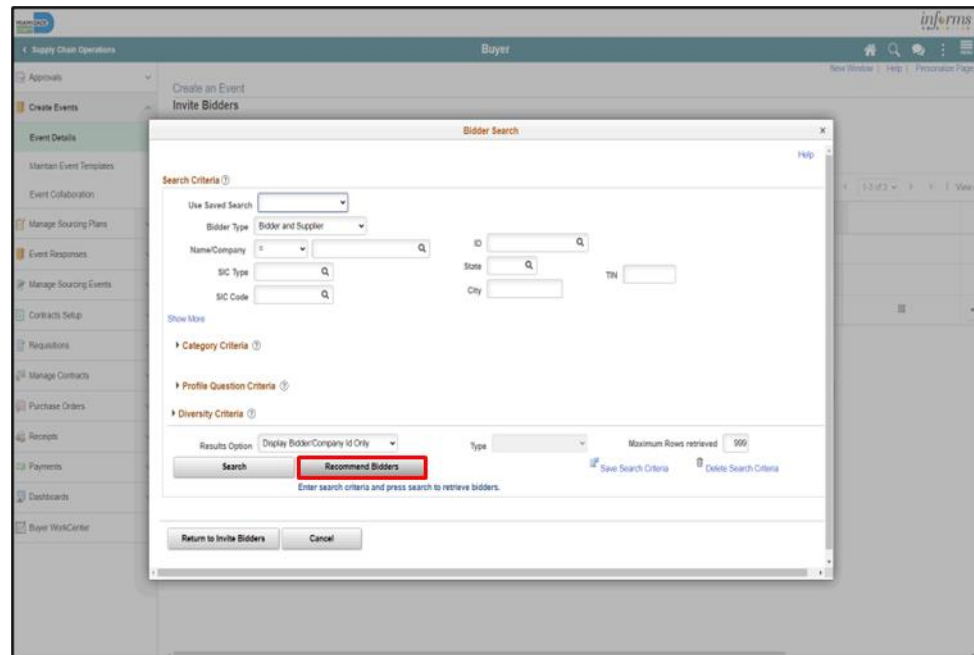
Note: Clerk of the Board and Vendor Services will be notified when the event is posted.

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.

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.

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

Module 2: Creating an RFI Event

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

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

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

40. Select the **OK** button.
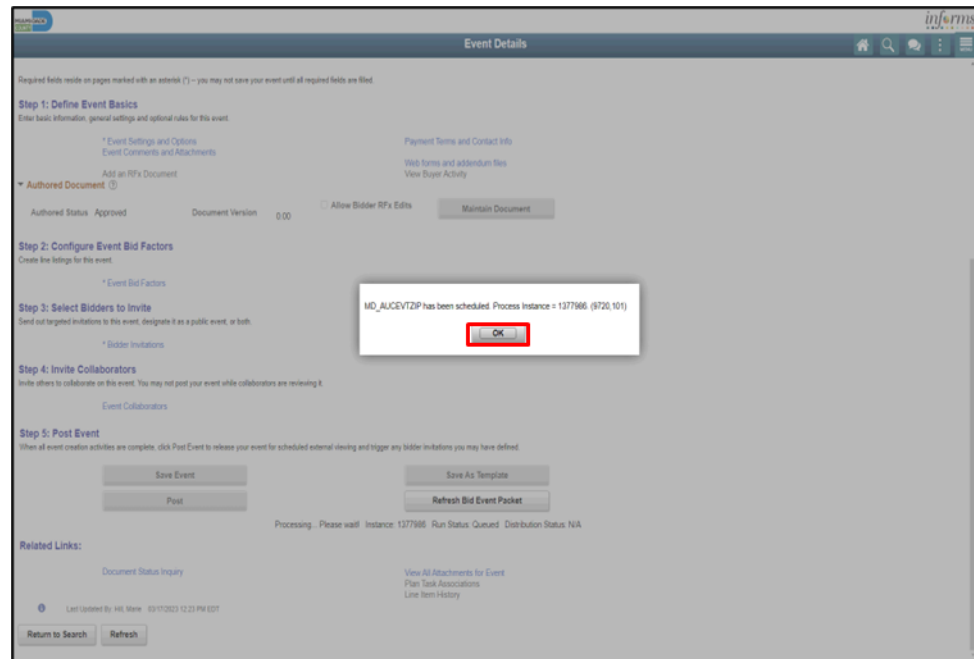
41. Select the **Refresh Bid Event Packet** button until a prompt screen appears.
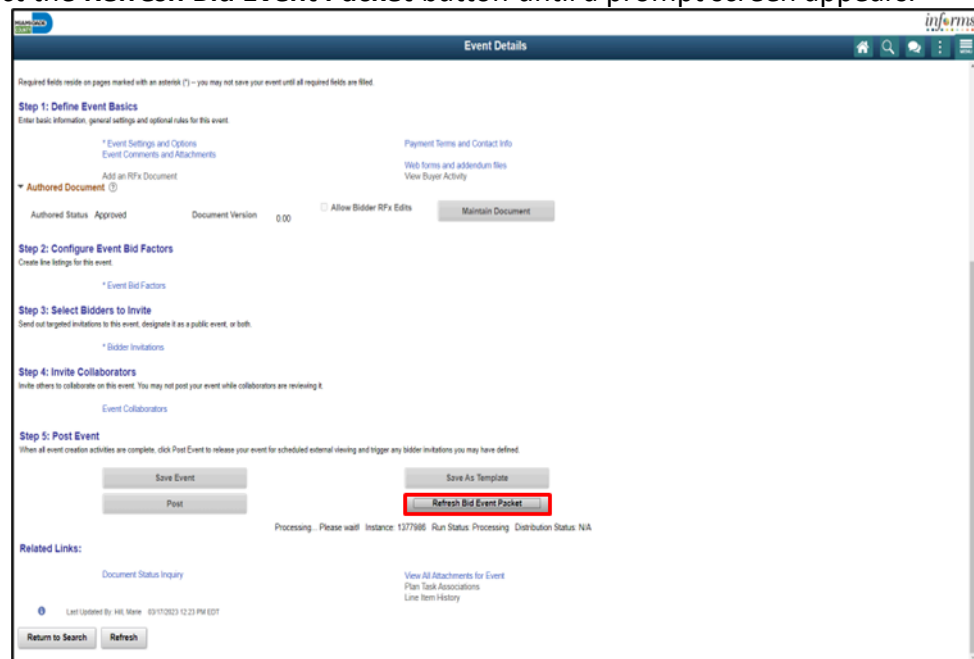
Module 2: Creating an RFI Event

42. Select the **OK** button.
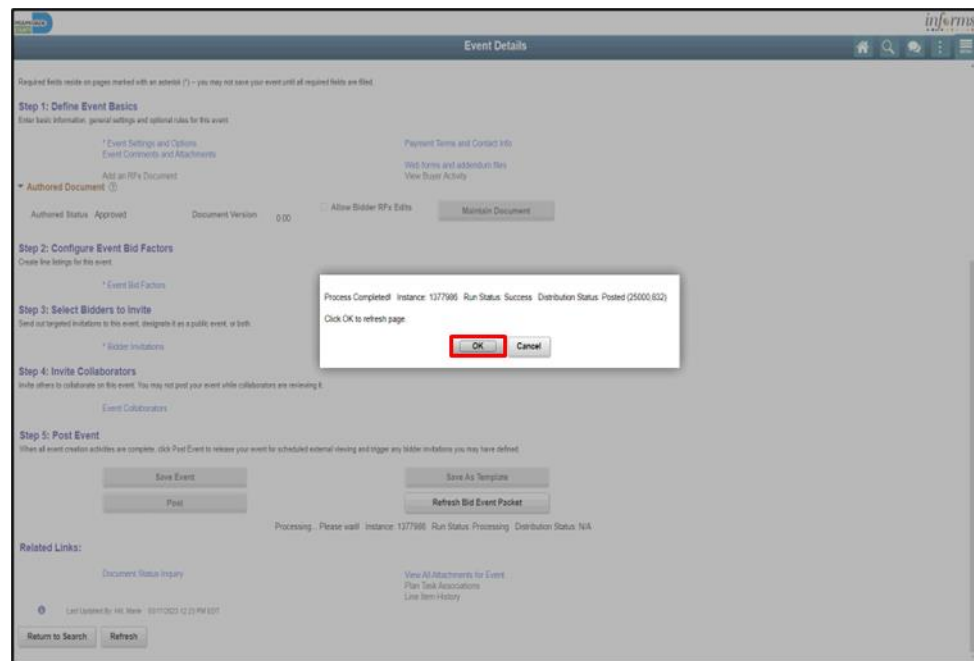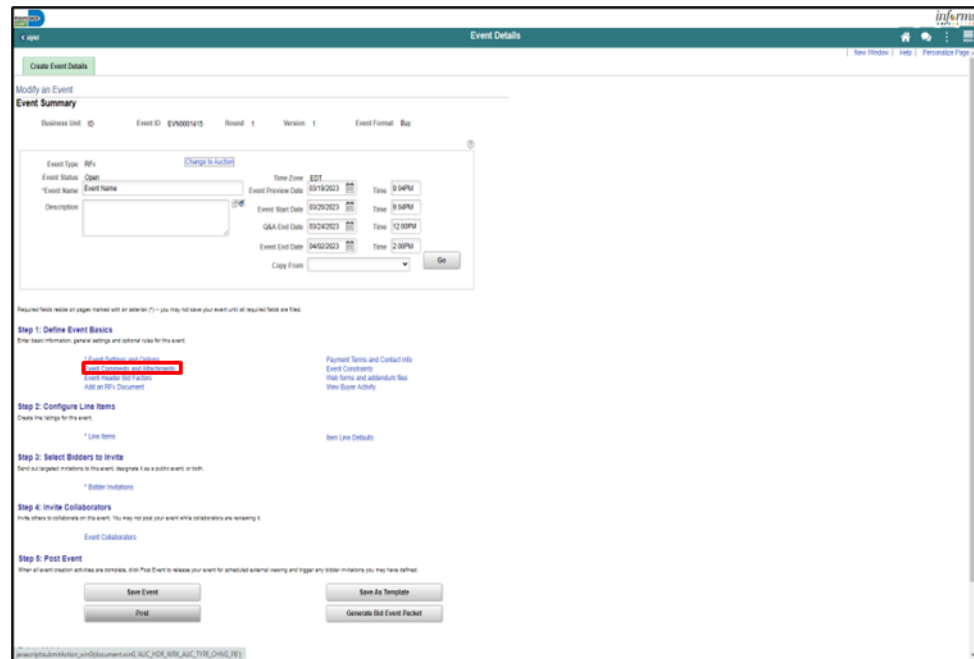
43. Select the **Save Event** button.
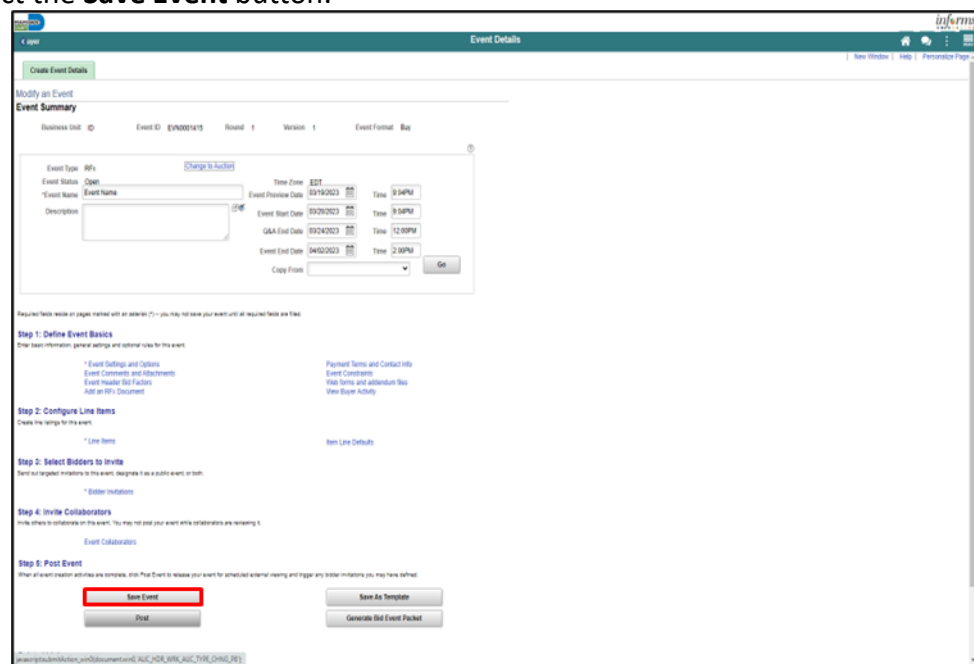
Module 2: Creating an RFI Event
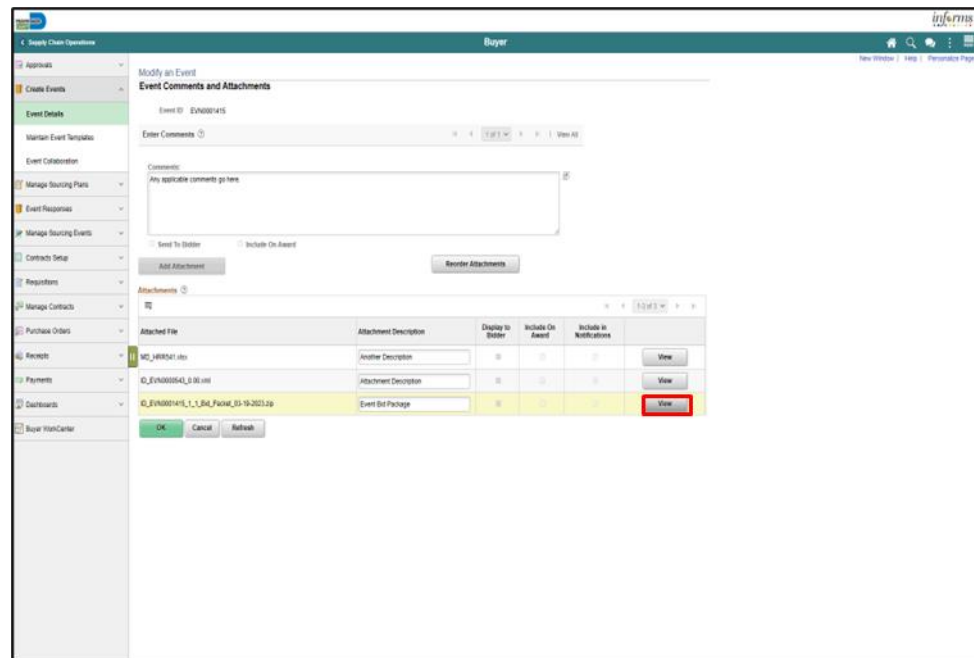
Lesson 1: Creating an RFI Event

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.
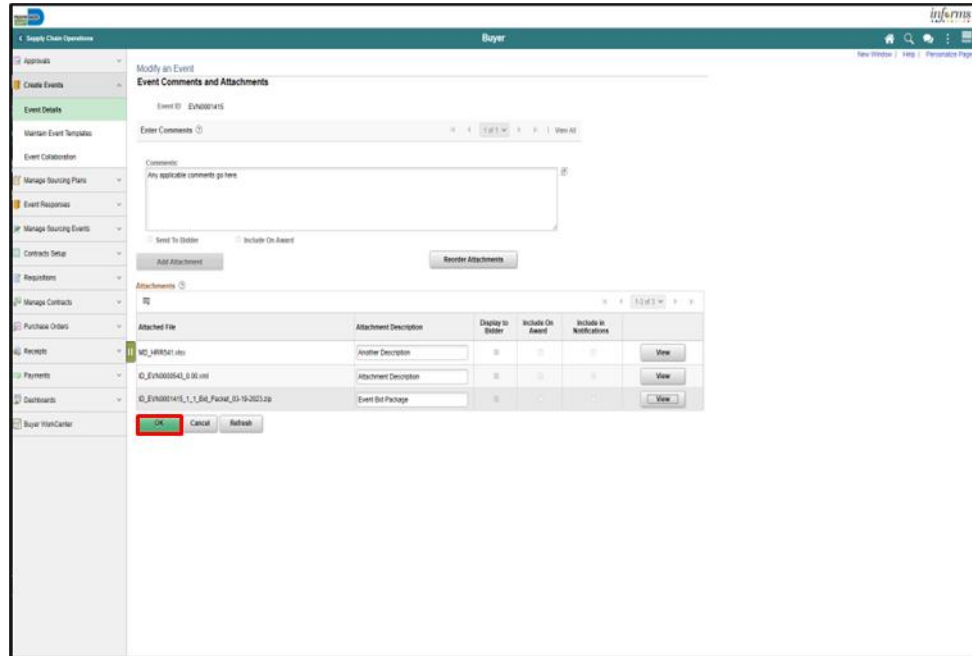
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Module 2: Creating an RFI Event

Lesson 1: Creating an RFI Event

46. Select the **OK** button.

Module 2: Creating an RFI Event

48 Select the **Post** button.

49 Select the **OK** button.

Module 2: Creating an RFI Event

50. Select the **OK** button.
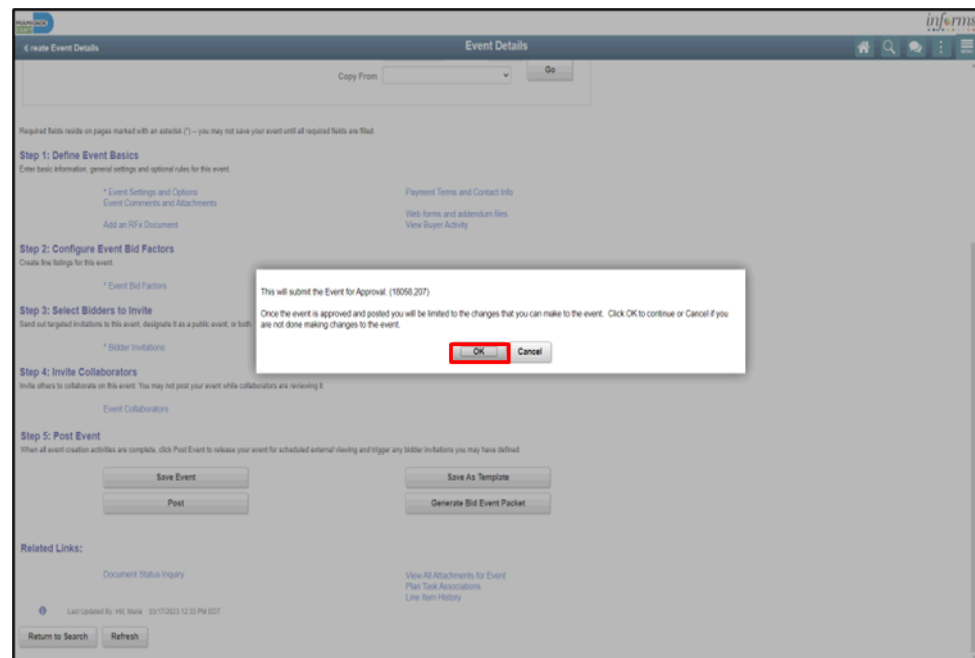
Module 2: Creating an RFI Event

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**.
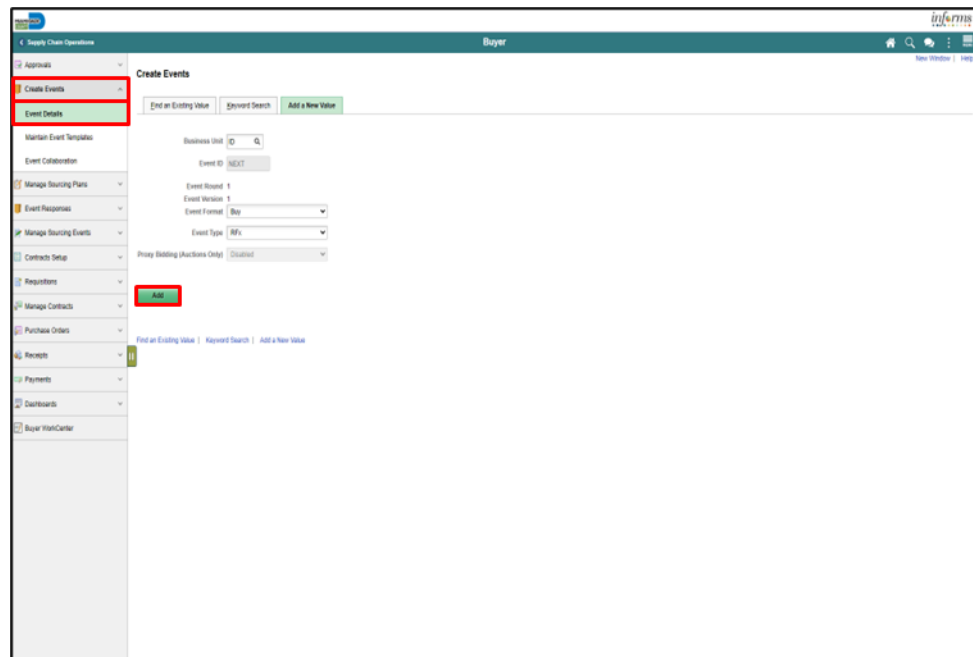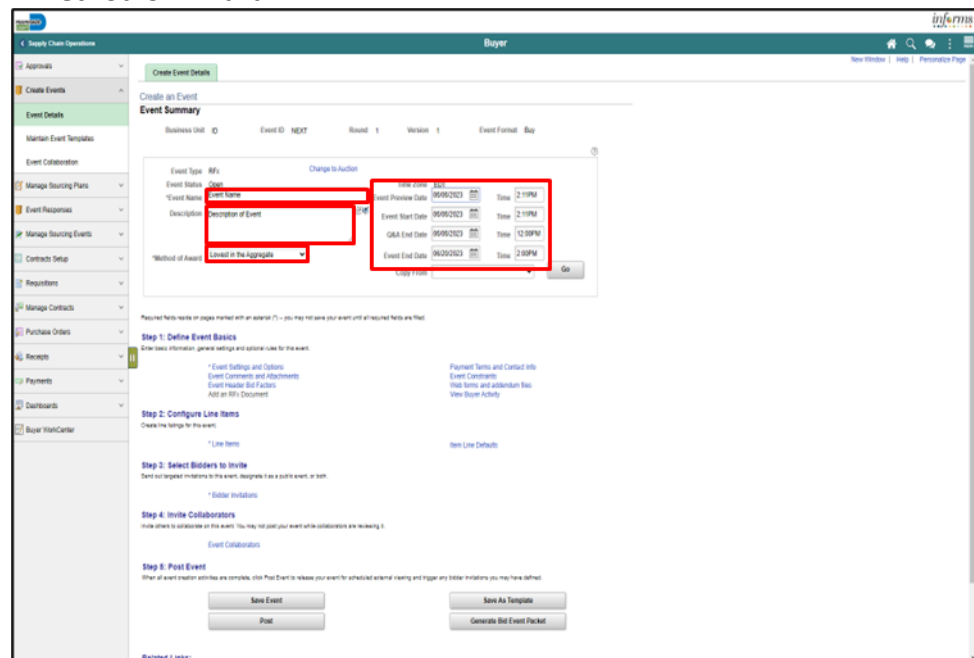
Module 3: Creating a Buy Event

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**

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Module 3: 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 <u>does</u> <u>not</u> copy over any Web Form and Addendums
  - Bid factors can be copied over but must be checked off.
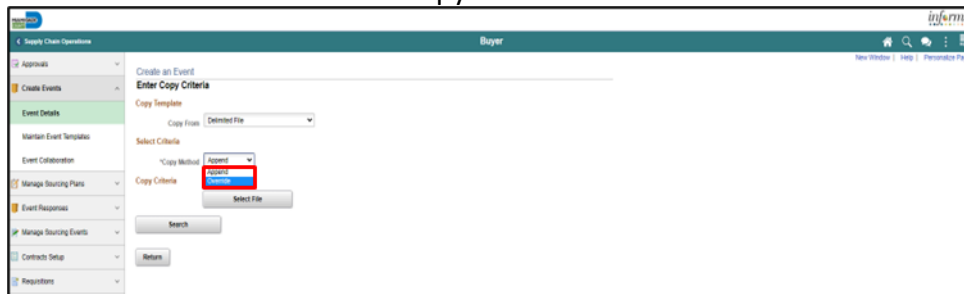
☑ Copy Event Factors\Constraints

- 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.
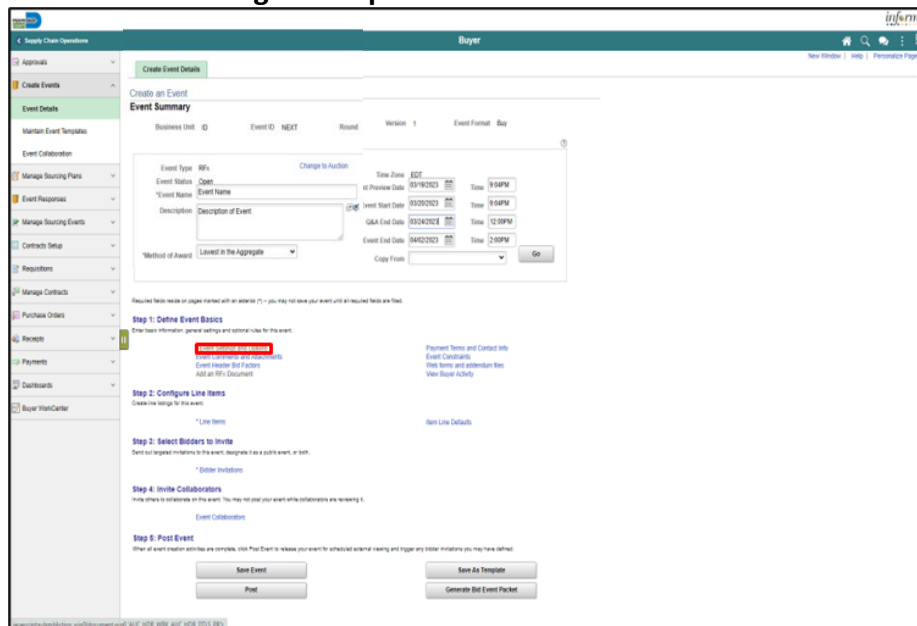
Module 3: Creating a Buy Event

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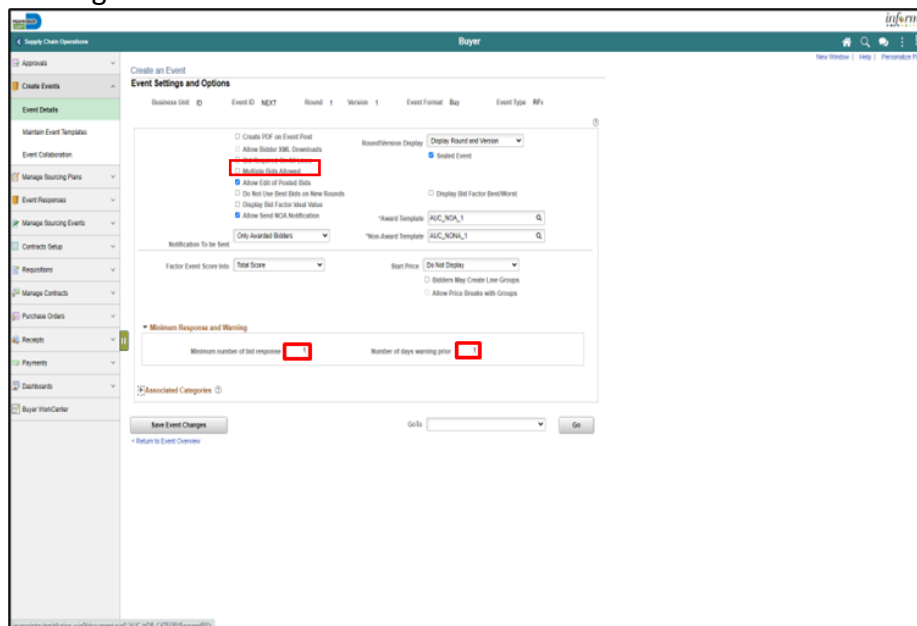
11. Enter the desired information into the **Number of days warning prior** field.

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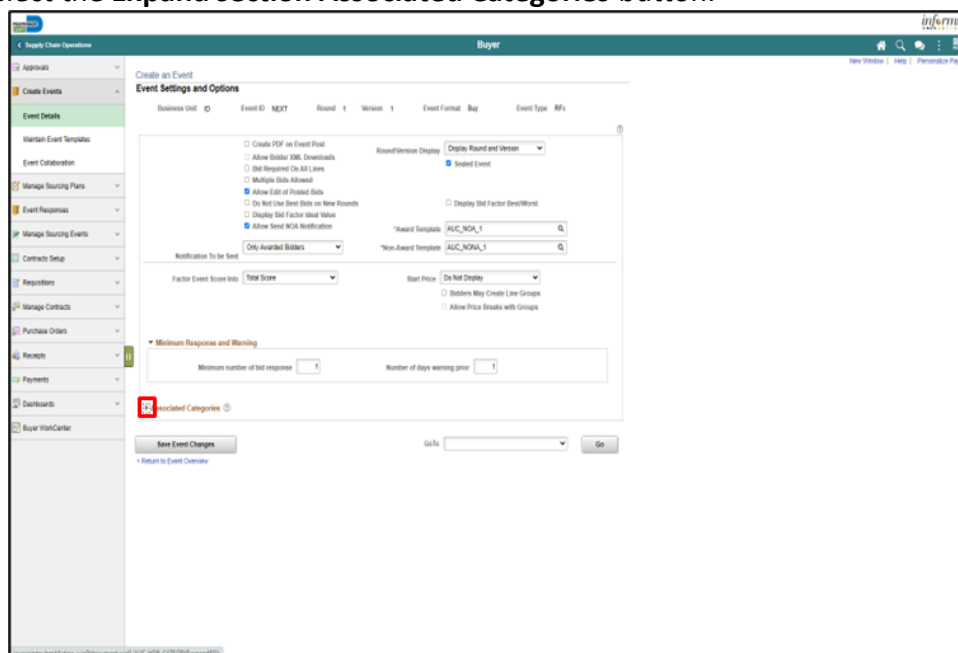
Note: Selecting this will remove the bidder's "No Bid" checkbox for all lines.

Module 3: Creating a Buy Event
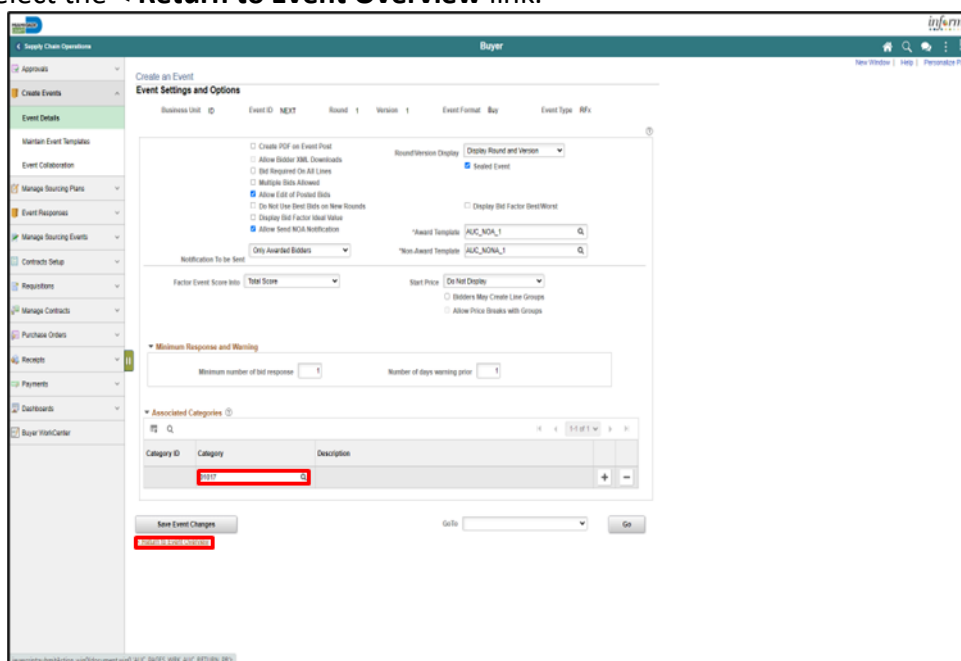
13. Select the **Expand section Associated Categories** button.

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.
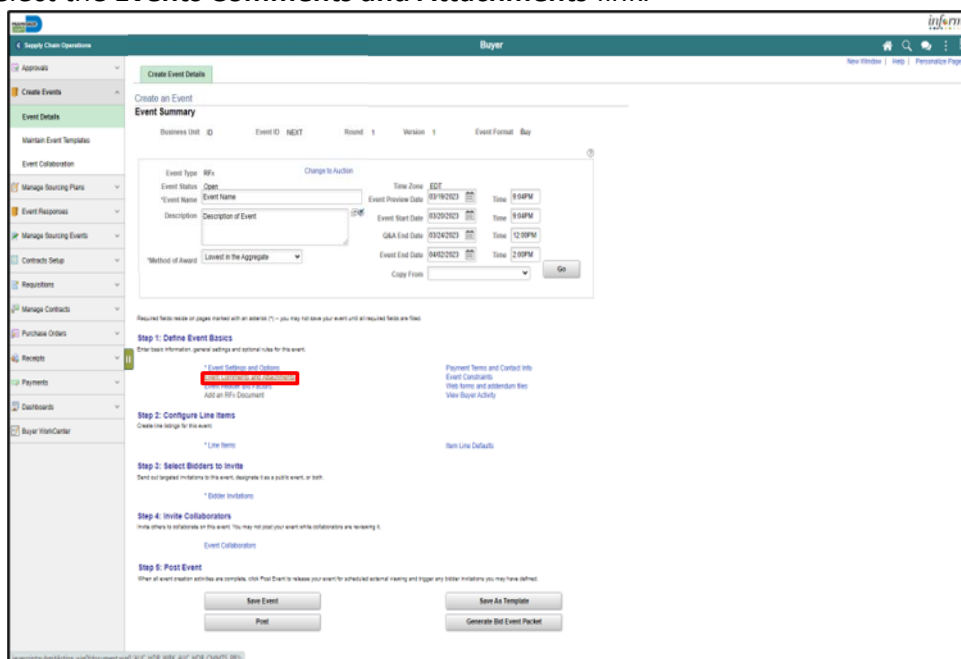
Module 3: Creating a Buy Event

Lesson 1: Creating a Buy Event
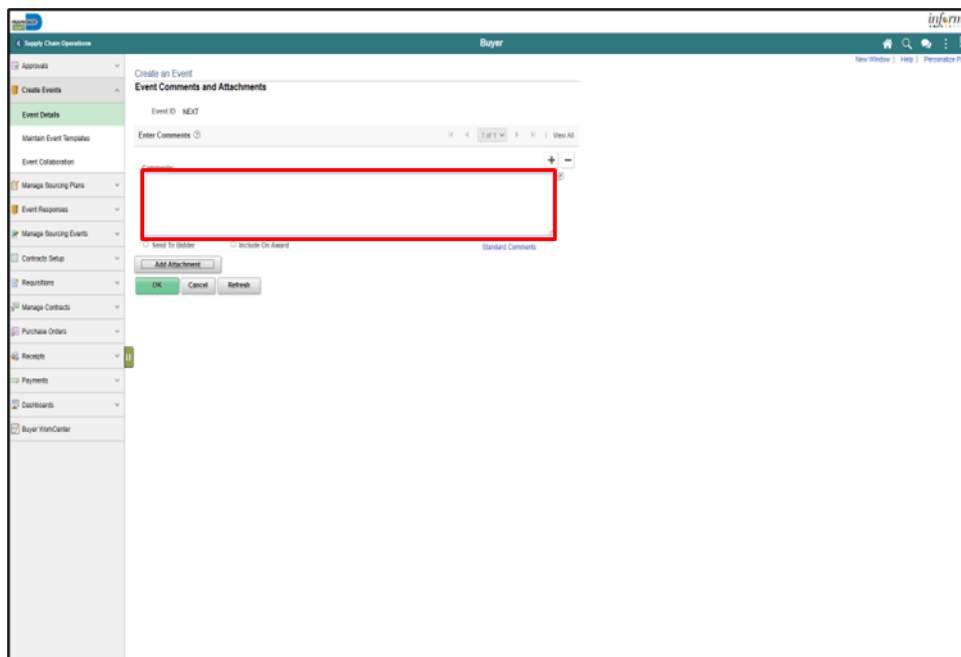
21. Select the **Events Comments and Attachments** link.

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

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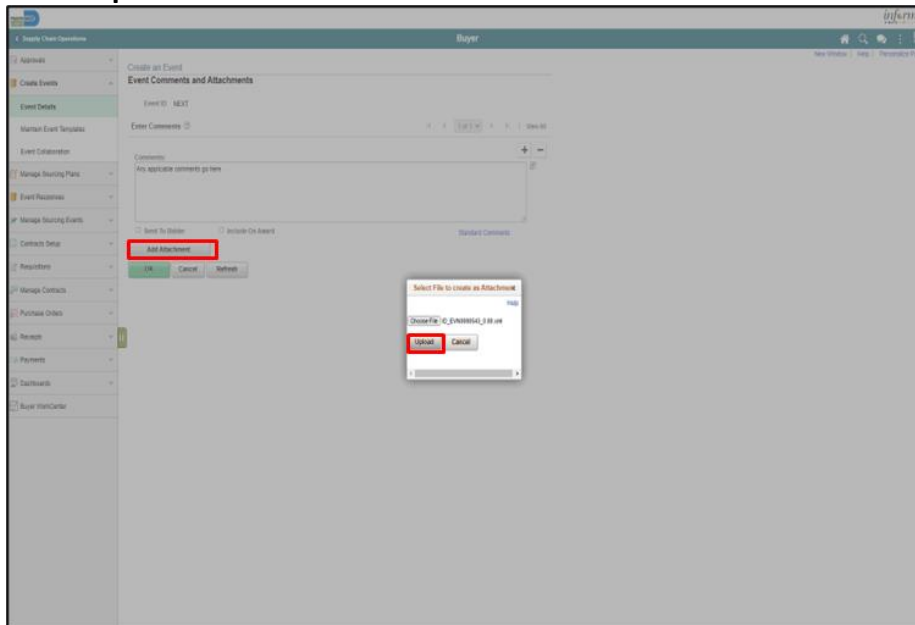
28. Enter the desired information into the **Attach Description** field.

*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.
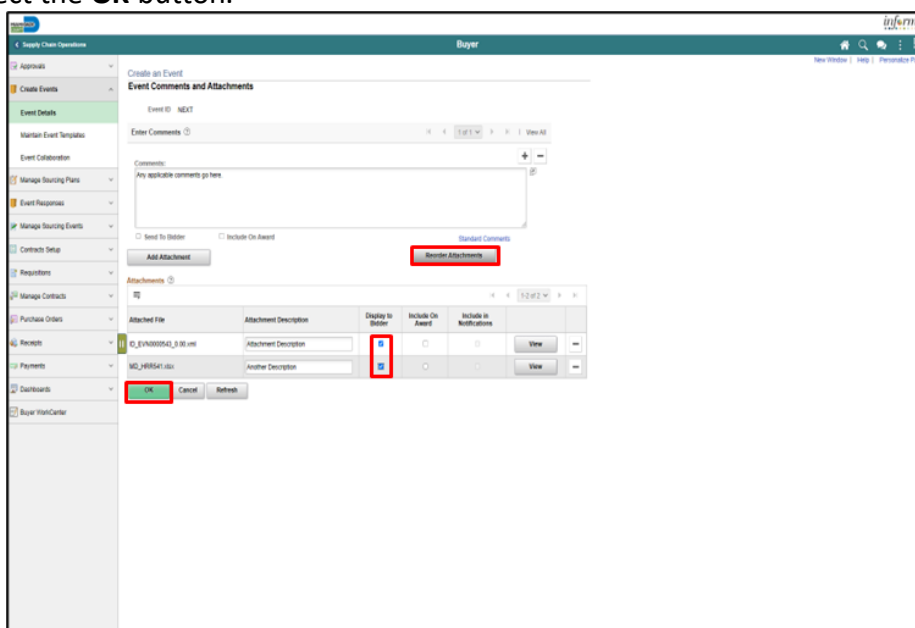
Module 3: Creating a Buy Event

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

31. Select the appropriate form(s) by checking the **Required for a Bid Event** box.
32. Select the **OK** button.
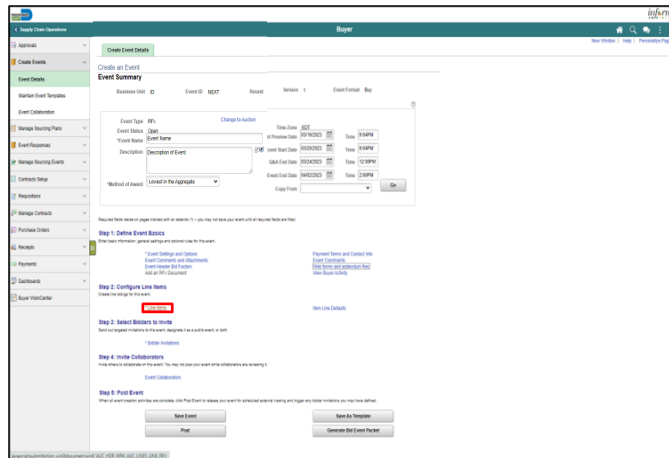
Module 3: Creating a Buy Event

Step 2: Configure Line Items

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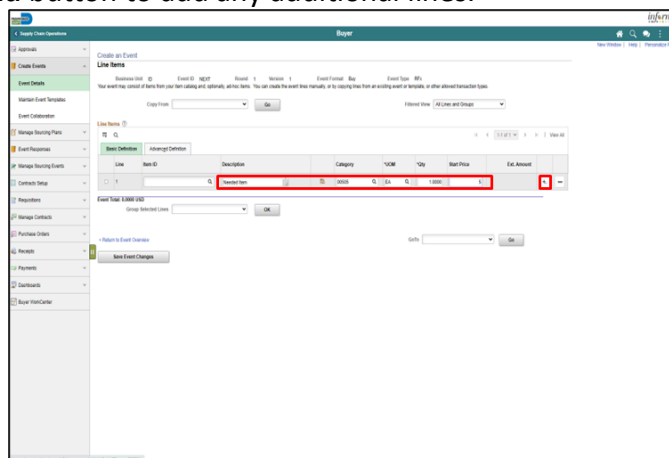
Note: The **Copy From** feature is available here to append or override line details. This copy feature allows the Buyer to copy from a delimited file, purchase order, requisition, sourcing event, or a sourcing template.

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.

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Module 3: Creating a Buy Event

Lesson 1:
Creating a Buy
Event
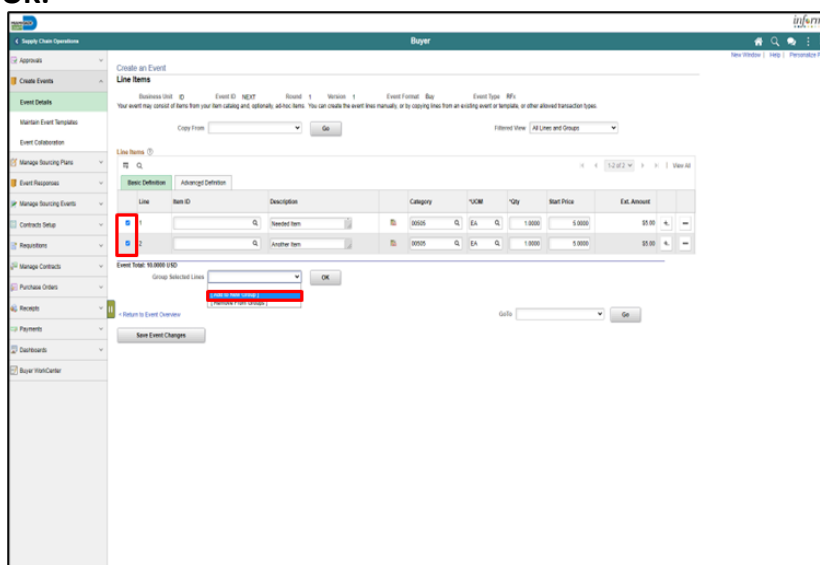
Grouping Lines [optional]

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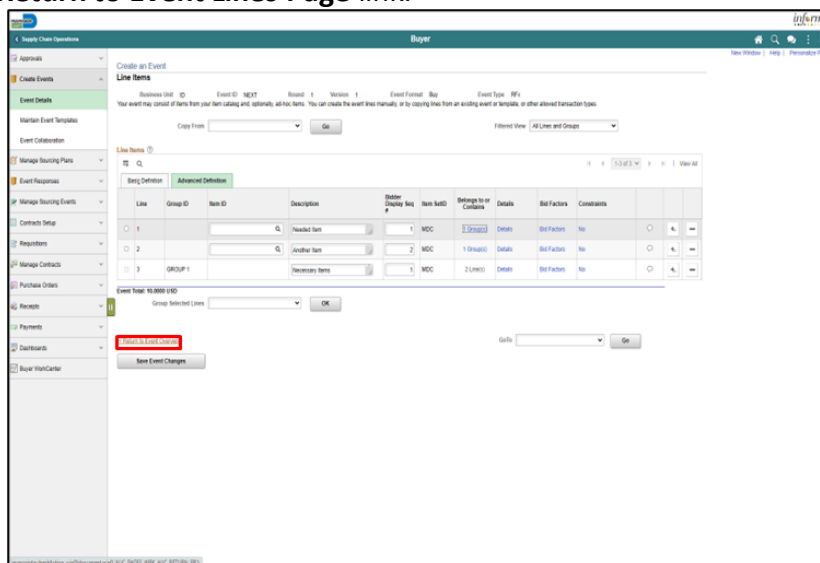
It is recommended that all lines within a group be designated to a group. If any lines are grouped, then all lines must be grouped. Group all lines and designate the appropriate Group ID which will be carried over when bids are evaluated and a contract is awarded.

- Select **OK.**

- Enter **UOM** for Grouped line.
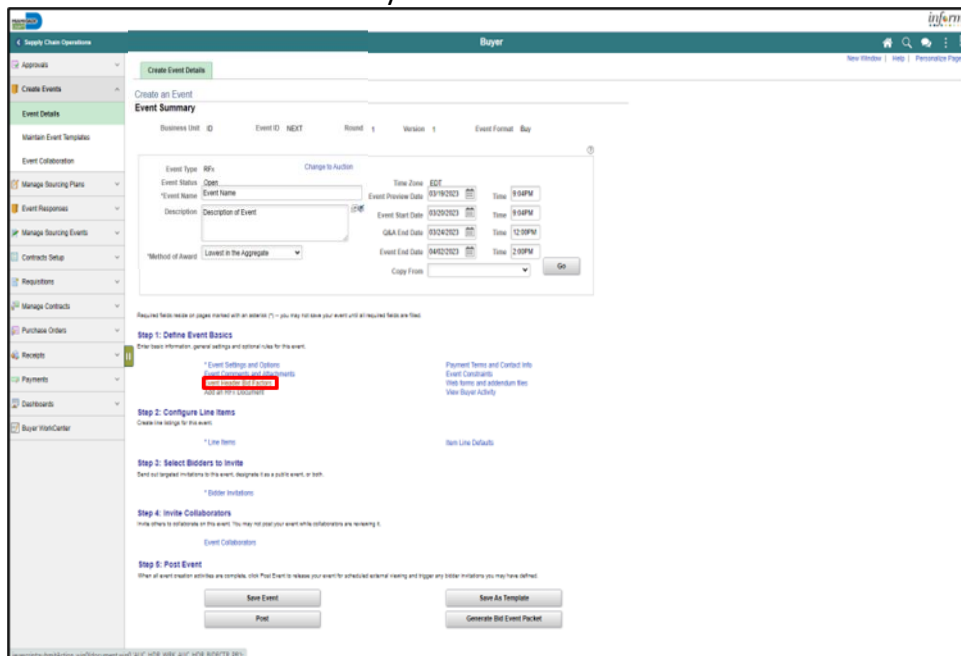
Select the **Return to Event Lines Page** link.

Module 3: Creating a Buy Event
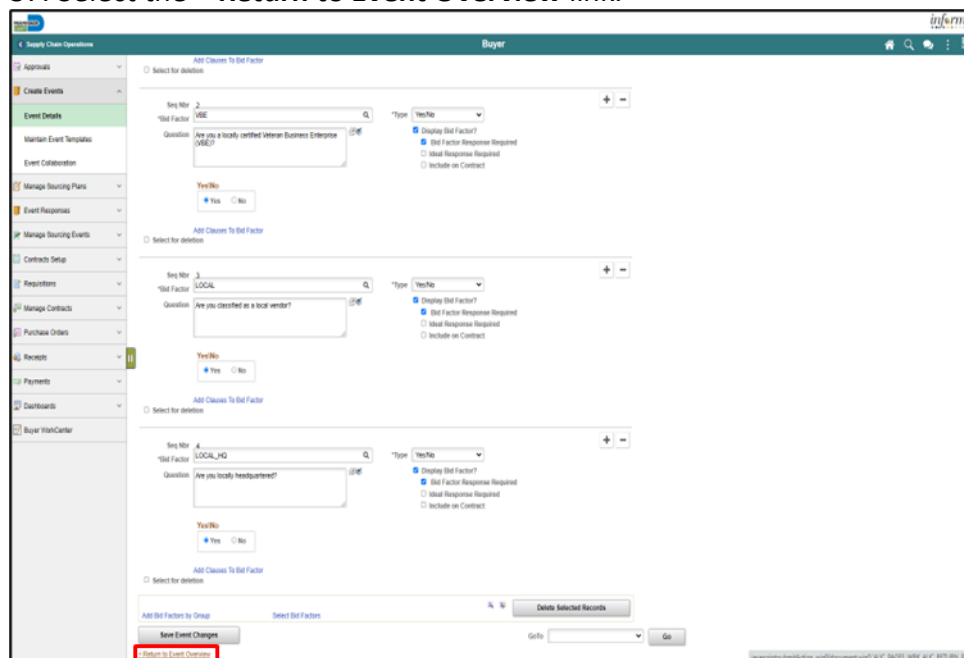
Lesson 1:
Creating a Buy
Event

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.
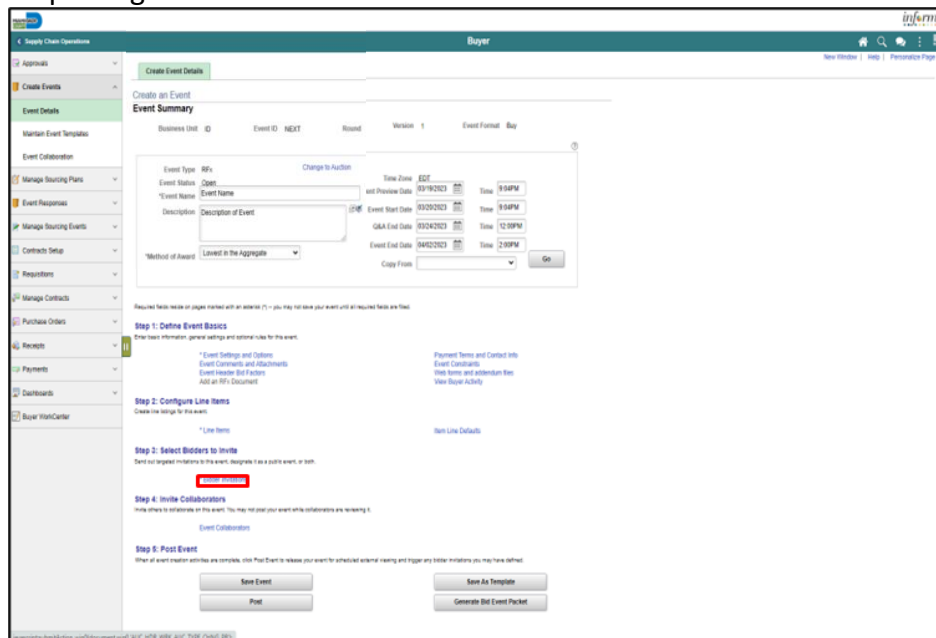
Module 3: Creating a Buy Event

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.
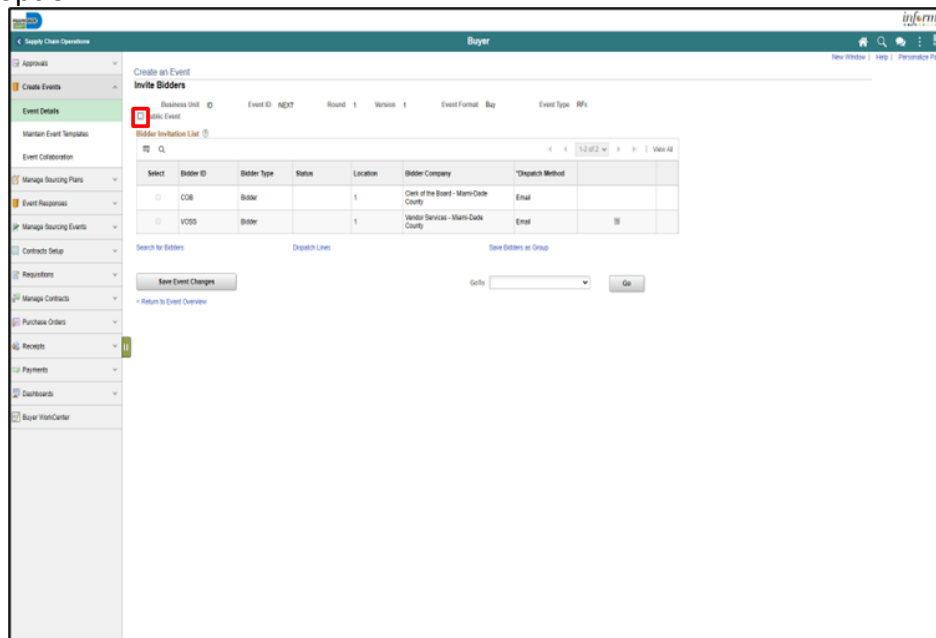
39. Select the **Public Event** option.
Note: When an event is public, all Bidders and Suppliers that are in the system will be notified automatically if the categories of the event match the categories from the Bidder's and Supplier's profile.
Note: If sourcing from a Bidder Group/Prequalified Pool, **do not** select the Public Event option.
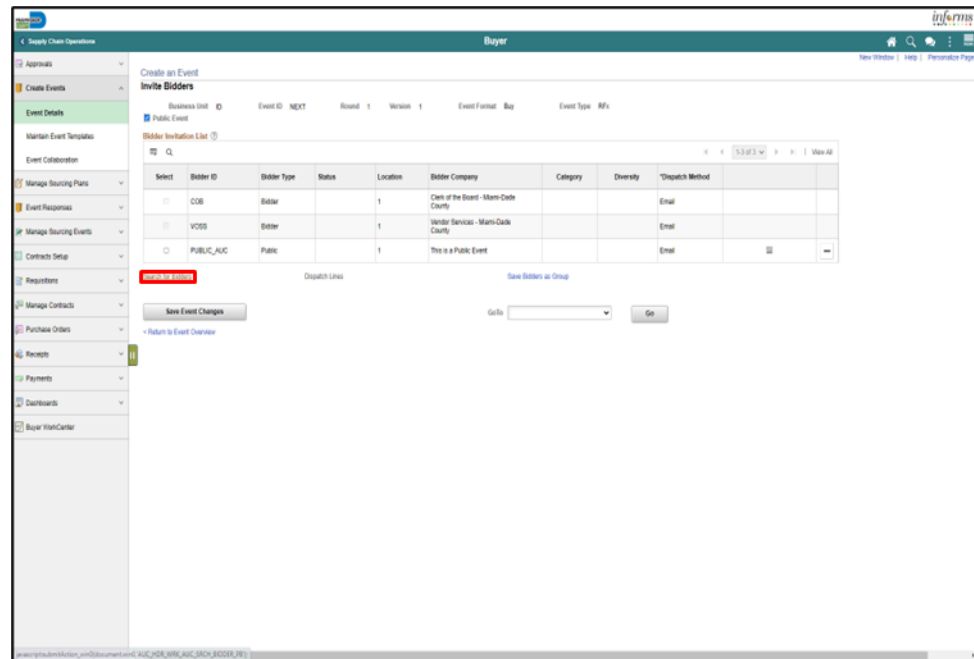
Module 3: Creating a Buy Event

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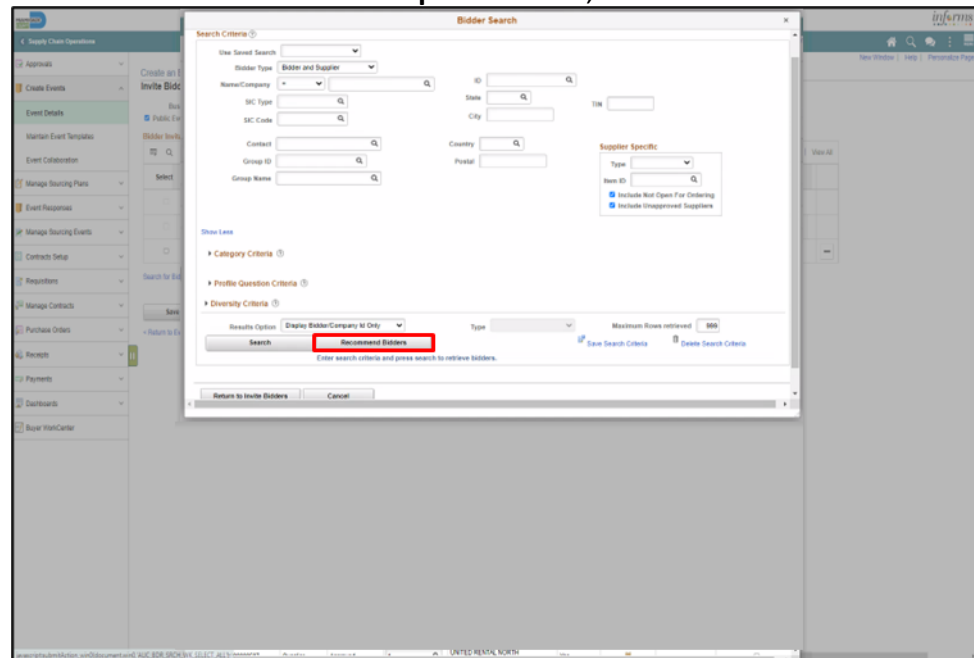
41. Select the **Recommend Bidders** button.
Note: If sourcing from a bidder group/prequalified pool, select the **Show More** link and enter the contract ID in the **Group Name** field, then select the **Search** button.

Module 3: Creating a Buy Event

Lesson 1:
Creating a Buy
Event

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

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

Module 3: Creating a Buy Event

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

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

Module 3: Creating a Buy Event

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

47. Select the **Yes** button.
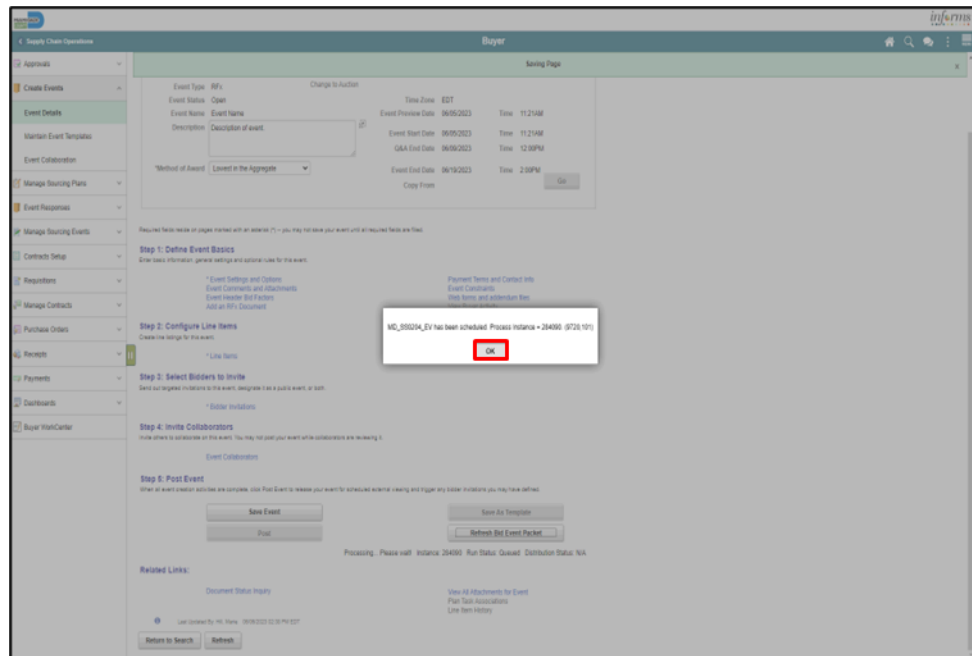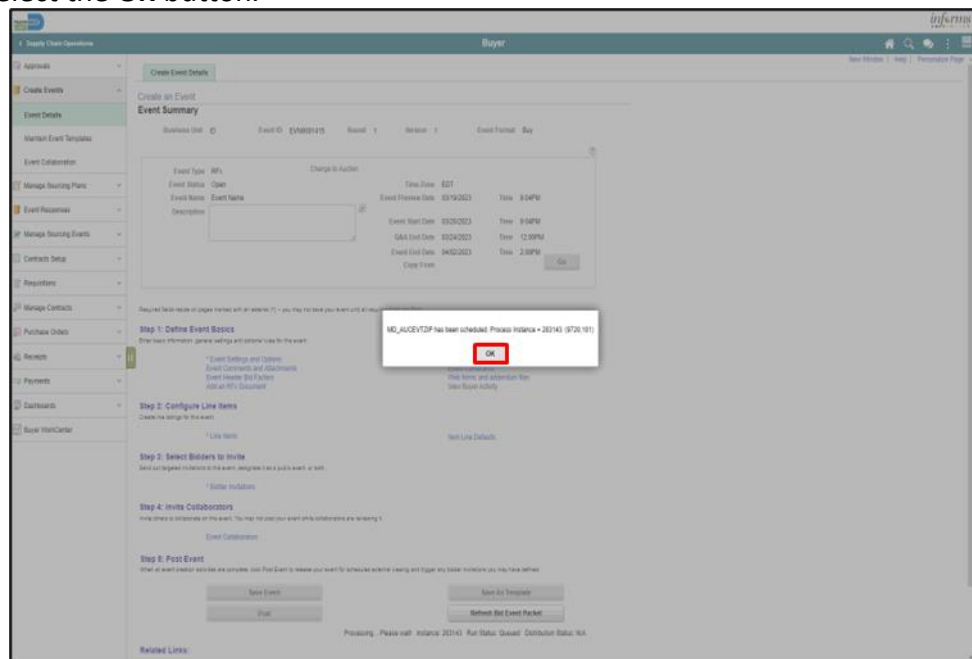
Module 3: Creating a Buy Event

48. Select the **OK** button.
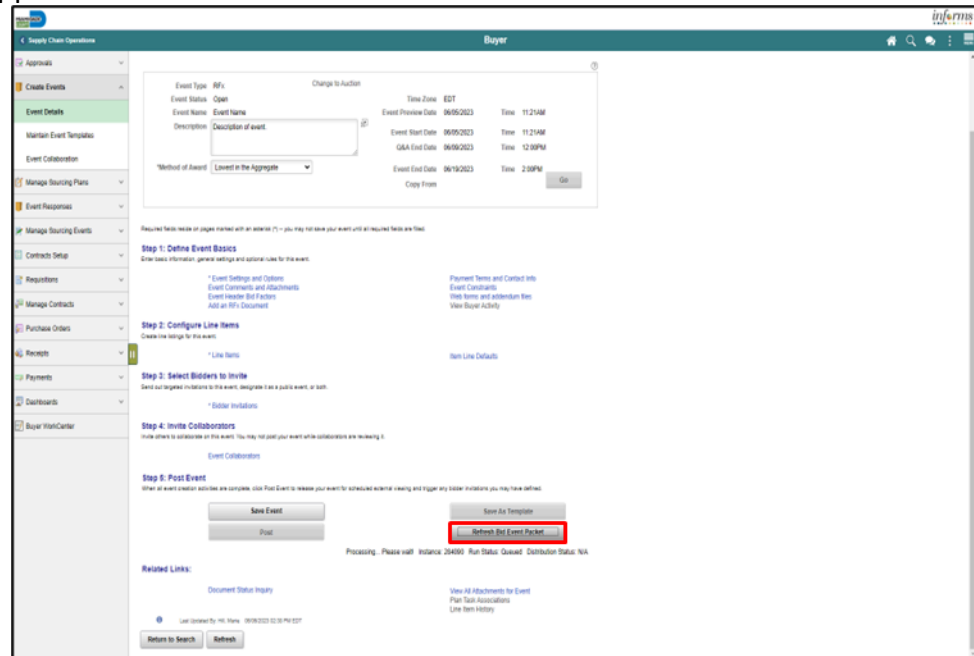
49. Select the **OK** button.
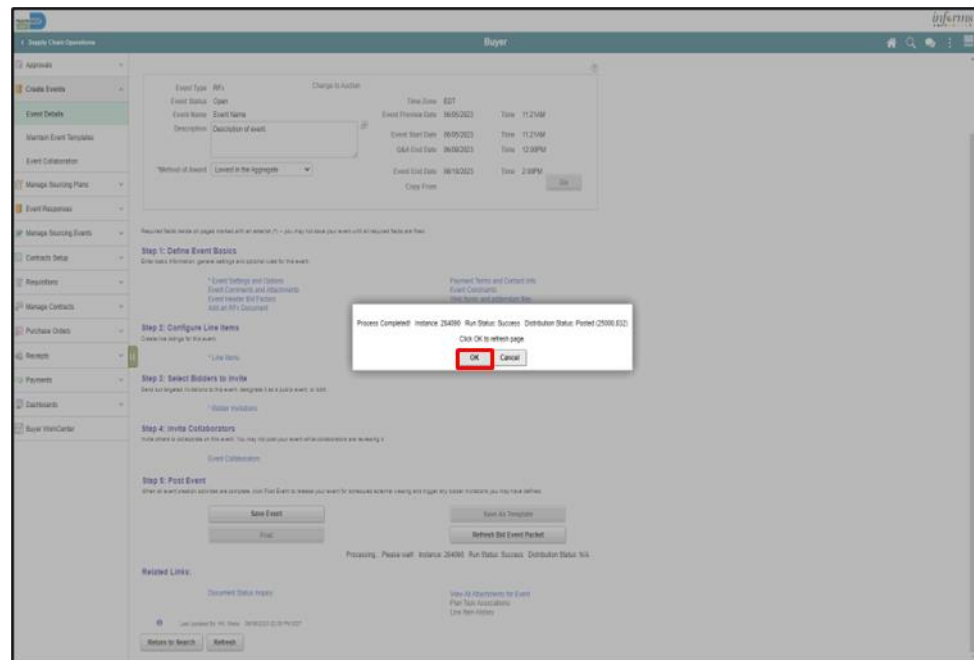
Module 3: Creating a Buy Event

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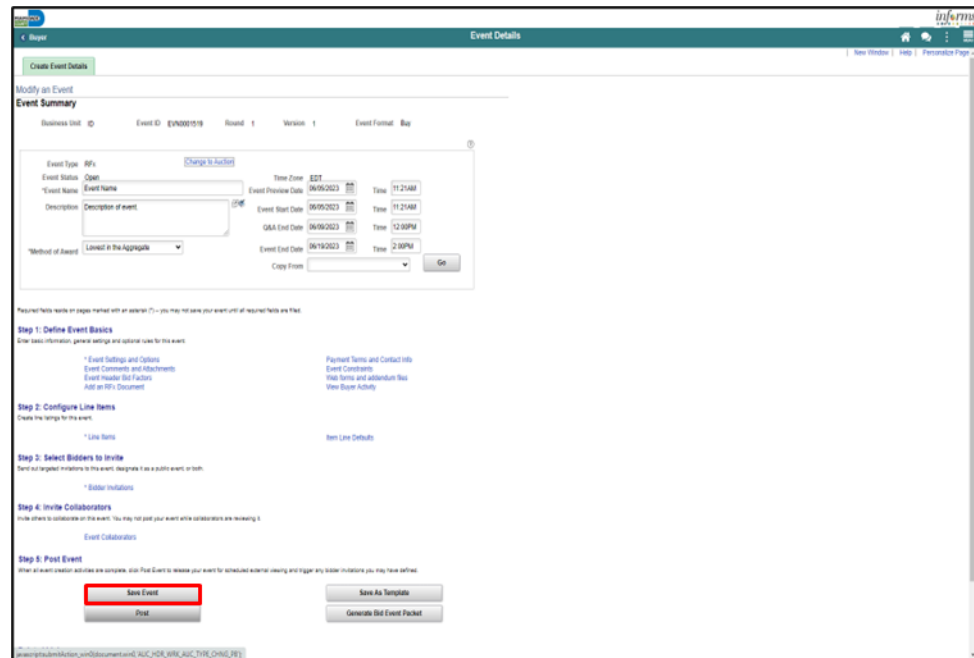
51. Select the **OK** button.

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Module 3: Creating a Buy Event

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

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

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.
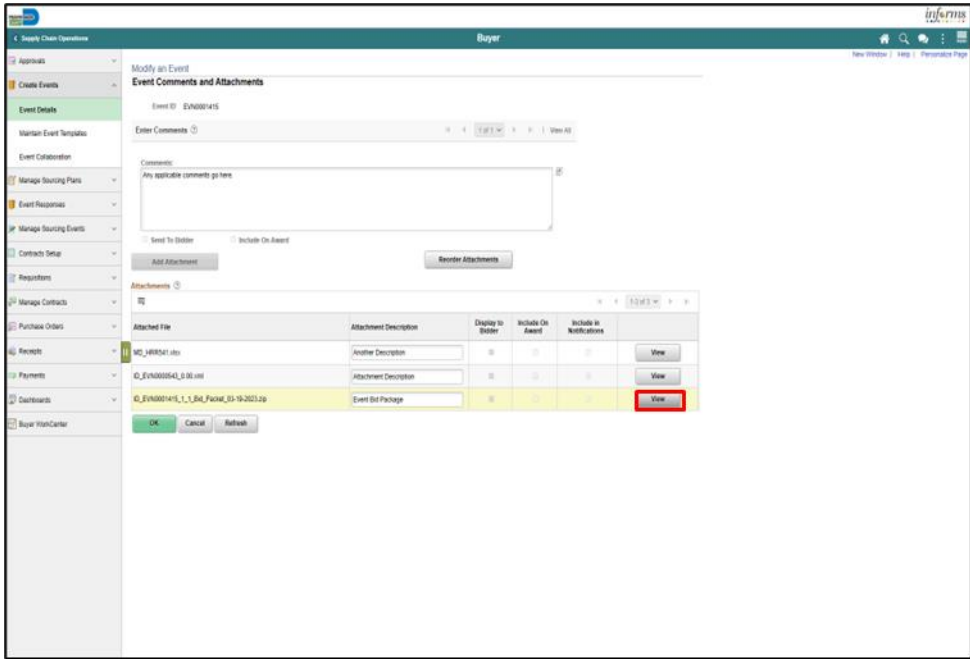
Module 3: Creating a Buy Event

55. Select the **OK** button.
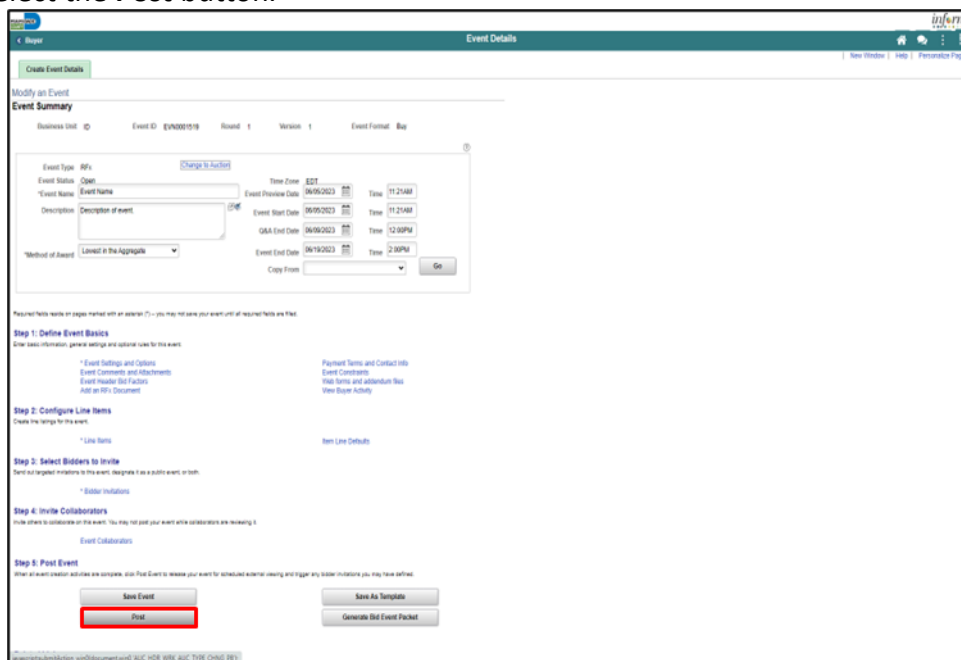
Note: The event bid packet gets automatically saved to the event attachments.

56. Select the **Post** button.

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57. Select the **OK** button.

58. Select the **OK** button.

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.
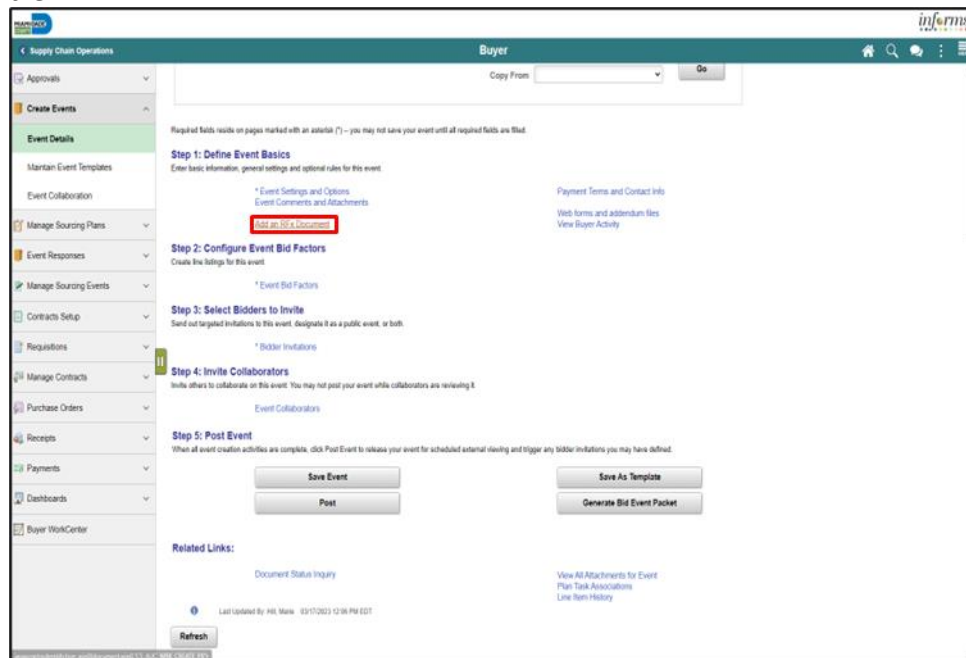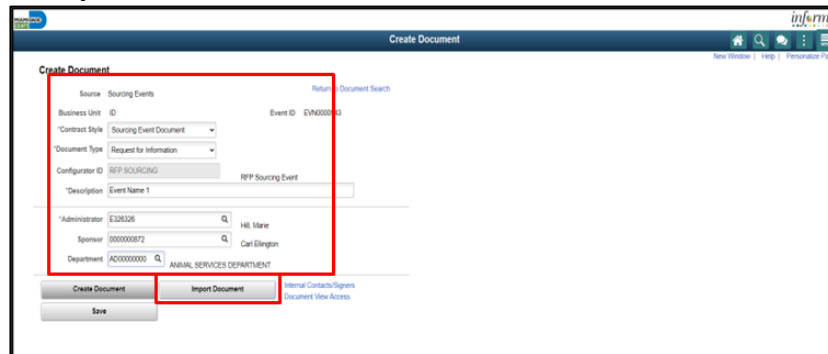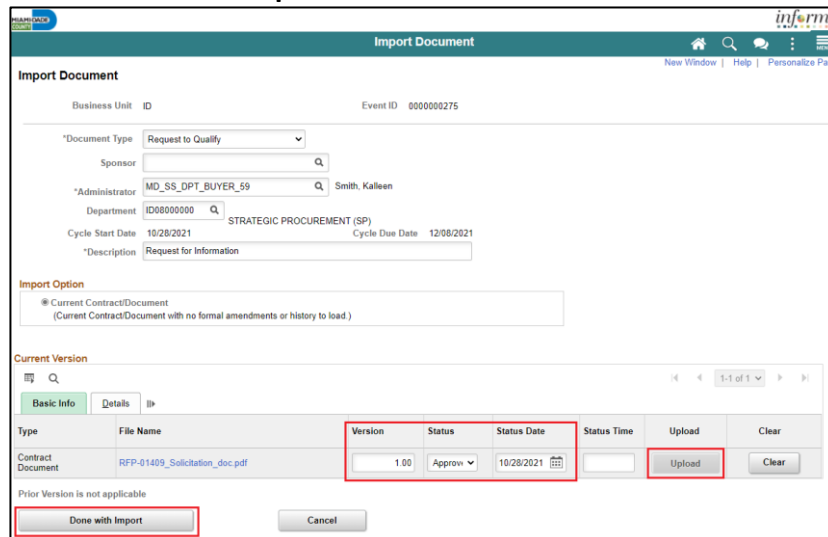
Module 3: Creating a Buy Event

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.
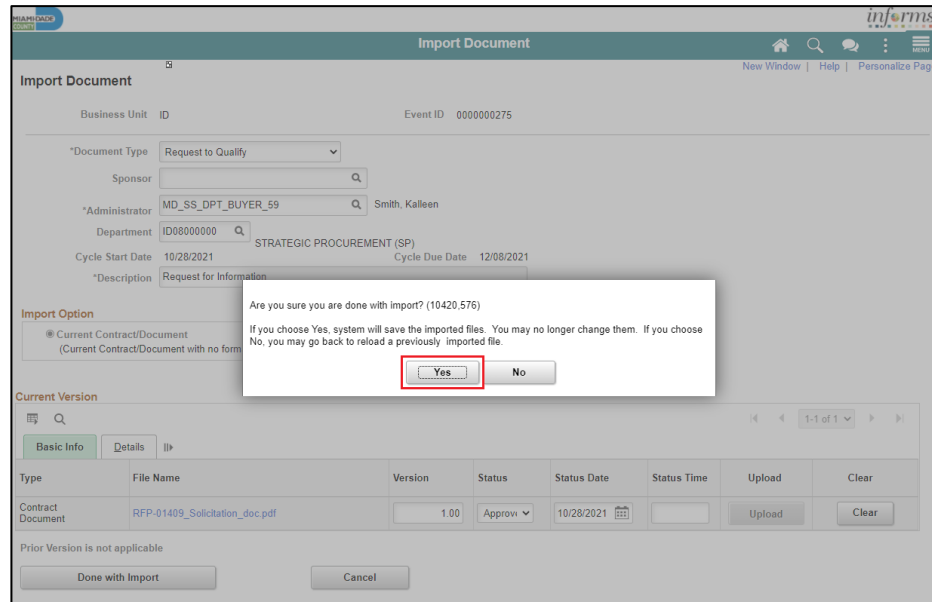
Module 3: Creating a Buy Event

Lesson 2: Import
an RFx
Document

5. Select the **Yes** button.

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

Module 3: Creating a Buy Event

Lesson 2: Import
an RFx
Document

7. Select the **Post** button.

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.
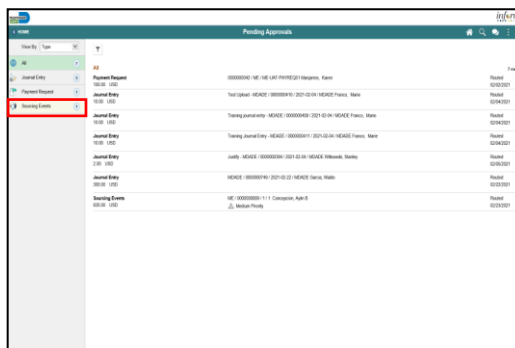
2. Select the Sourcing Event to approve.
3. Select the **Full Site** link.
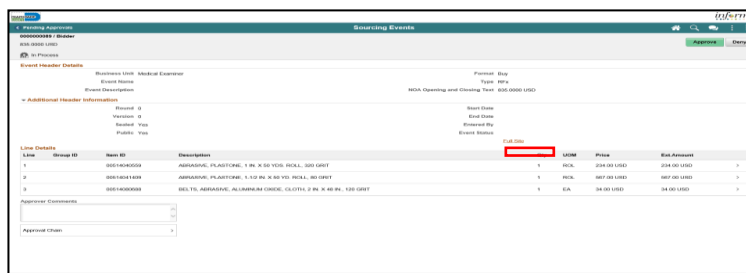
Note: Review Sourcing Event by Selecting on the applicable links on the Event Details page,
e.g., Event Comments and Attachments link, Web forms and addendum files link.

4. Select the **Event Approval** button.
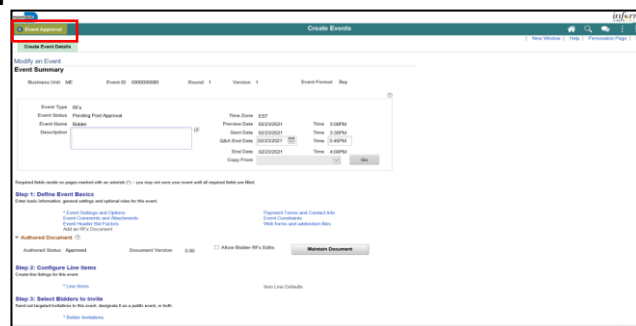
5. Select the **Approve** or **Deny** button.
6. Enter the desired information into the **Approver Comments** field.
7. Select the **Submit** button.
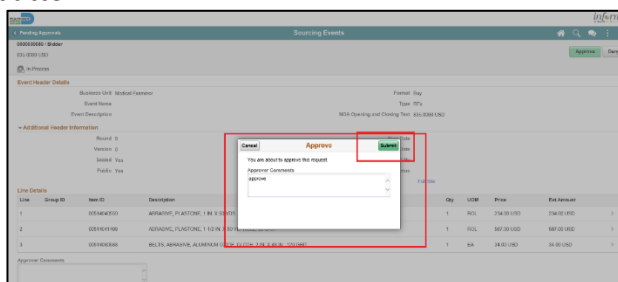
Note: If the event is denied, it will route back to the Strategic Sourcing Buyer to modify the
event.

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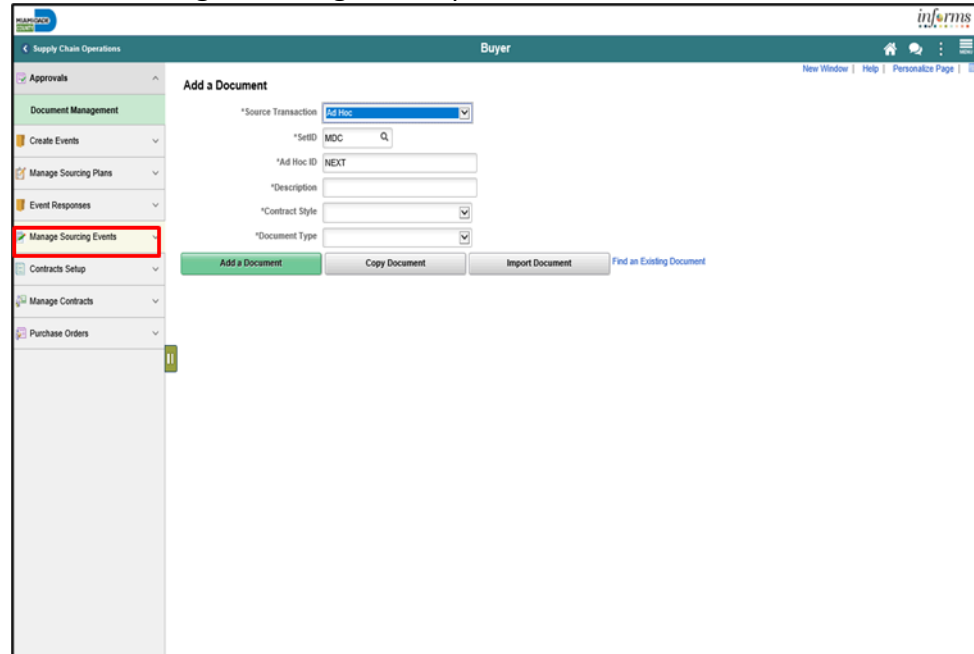
Term	Definition
Create New Version	Select this icon to prompt changes to an event. The new version will allow event changes to line items, event dates, and attachments, etc.
Generate Bid Event Packet	Select this to run the process to generate the Bid Packet. All event attachments, marked Display to Bidder,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

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

Module 5: Creating Multiple Versions of Sourcing Events

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

4. 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.

Module 5: Creating Multiple Versions of Sourcing Events

Lesson 1:
Creating
Multiple
Versions of
Sourcing Events

5. Select the **Yes** button.

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
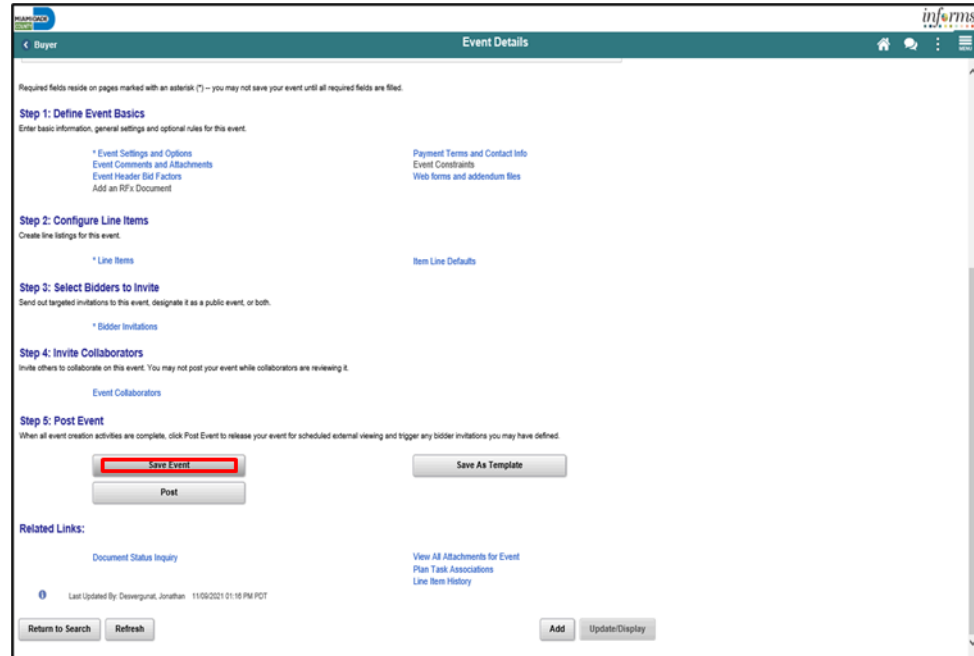
Module 5: Creating Multiple Versions of Sourcing Events

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

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

Module 5: Creating Multiple Versions of Sourcing Events

10. Select the **Yes** button.

11. Select the **OK** button.

Module 5: Creating Multiple Versions of Sourcing Events

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

13. Select the **OK** button.

Module 5: Creating Multiple Versions of Sourcing Events

Lesson 1:
Creating
Multiple
Versions of
Sourcing Events

14. Select the **Post** button.

15. Select the **OK** button.

Module 5: Creating Multiple Versions of Sourcing Events

Module 5: Creating Multiple Versions of Sourcing Events Summary

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

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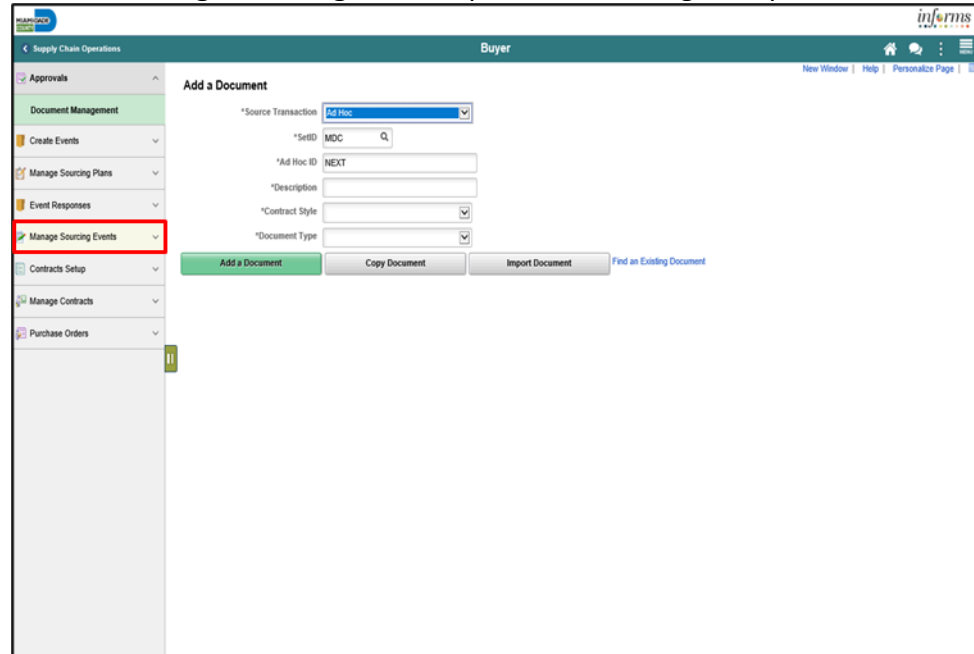
Term	Definition
Q&A Forum	Forum available to communicate questions and comments related to a specific event.

Module 6: View Event Q&A Forum

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

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

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

Module 6: View Event Q&A Forum

Lesson 1: View
Event Q&A
Forum

3. Select the **Event Q&A** link.
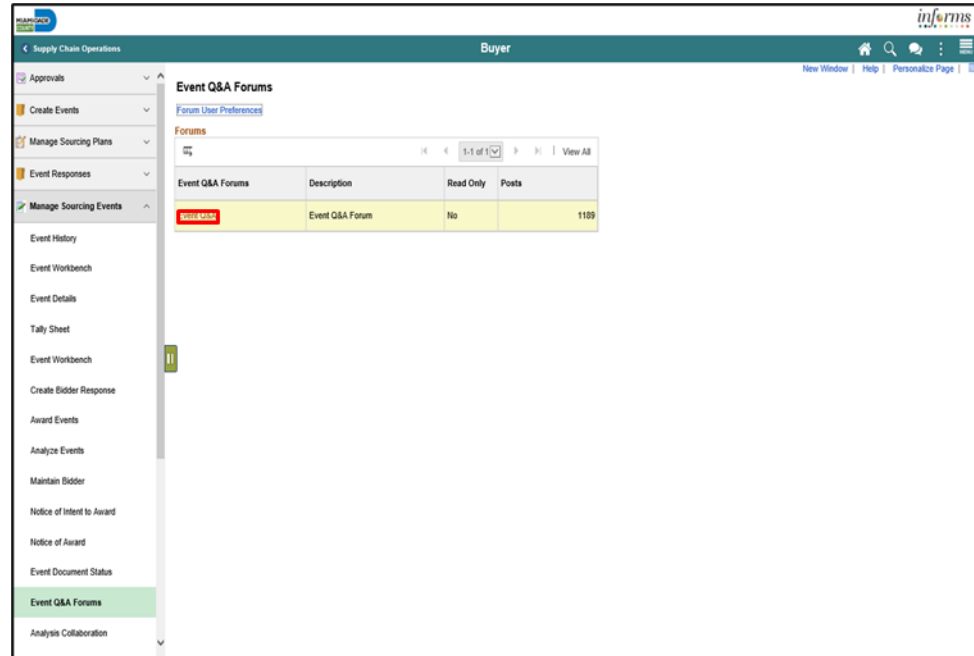
4. Select the relevant event message thread.

Module 6: View Event Q&A Forum

5. Select the relevant links within the Forum.
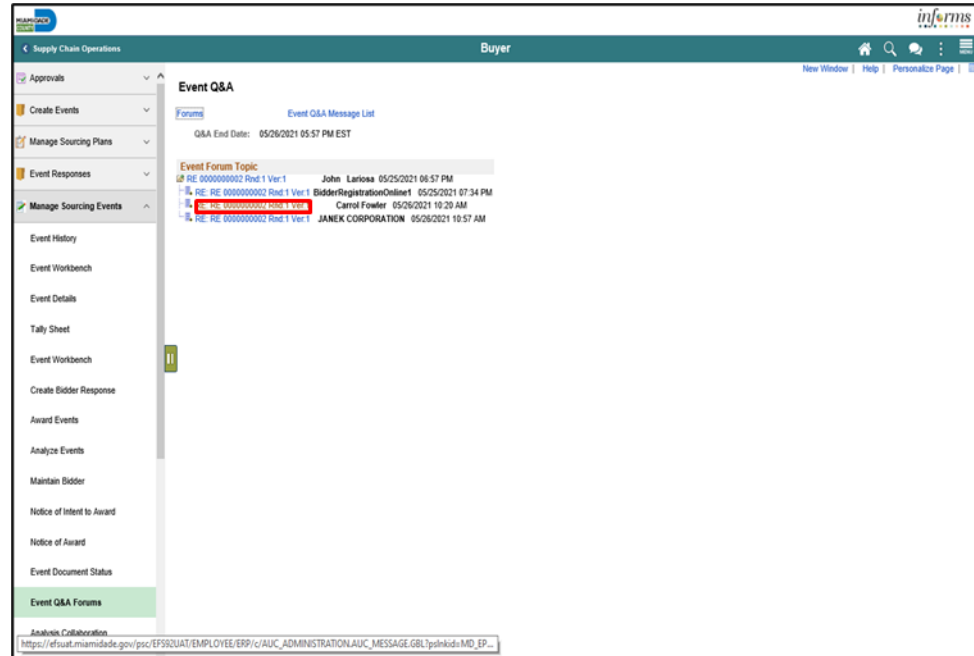
6. Select the **Return to Message Thread** link.
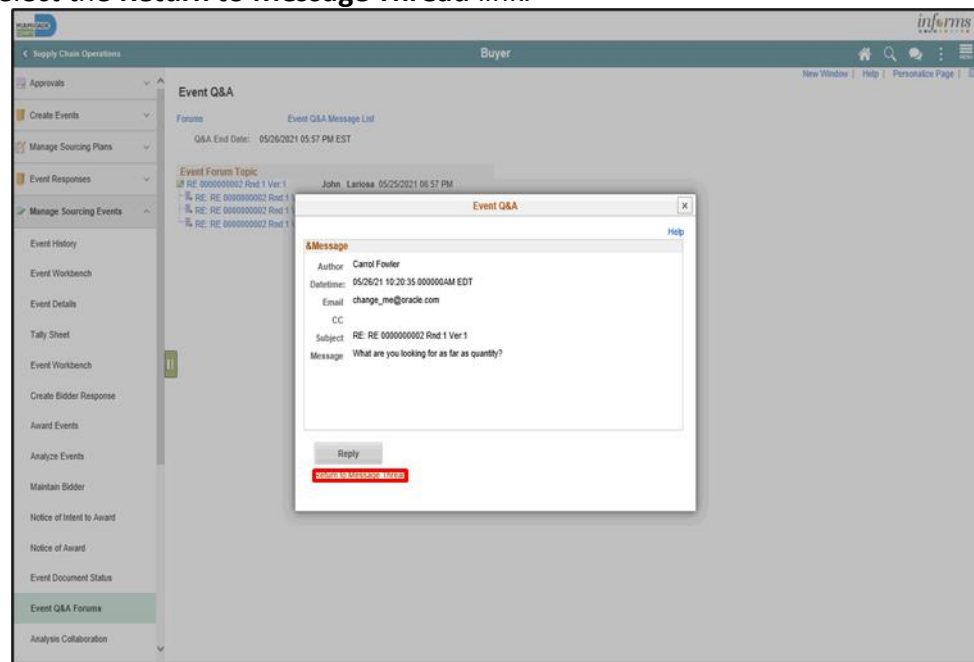
Module 6: View Event Q&A Forum

Module 6: View
Event Q&A
Forum Summary

Now that the lesson has been competed, 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	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 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 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
Bid Summary	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. A system generated file that gives a summary of what was submitted.
Vendor Files	All files uploaded by a bidder when submitting a bid. Vendor files are the individual files that were uploaded by the bidder.
Merged Files	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. Combined PDF documents pertaining to the event which include solicitation, tabulation, and bid proposal packets.

Module 7: Analyzing an Event

To analyze an event, review of the merged files and vendor files is necessary.
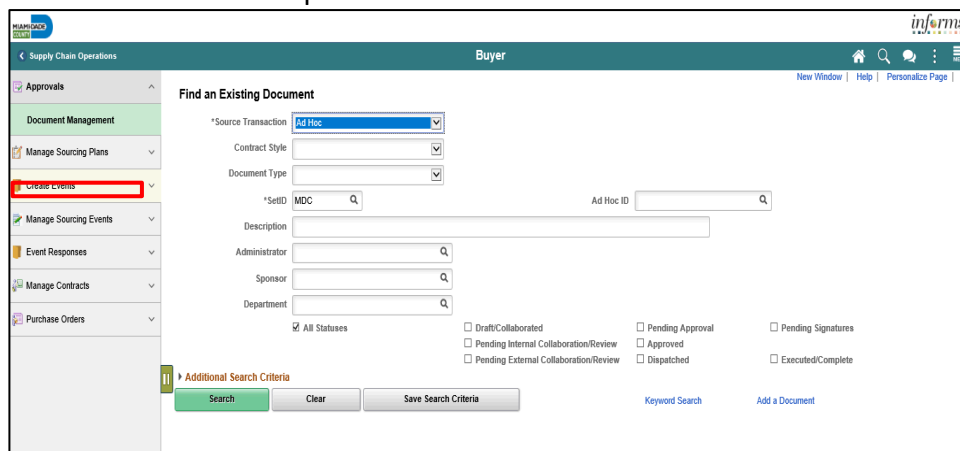
Vendor files are the individual files that were uploaded by the bidder while bidding on an event. After a bidder submits a bid, they receive a bid summary. The bid summary is a system generated file that gives a summary of what was submitted. The bid summary also lists any attachments that were uploaded 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.
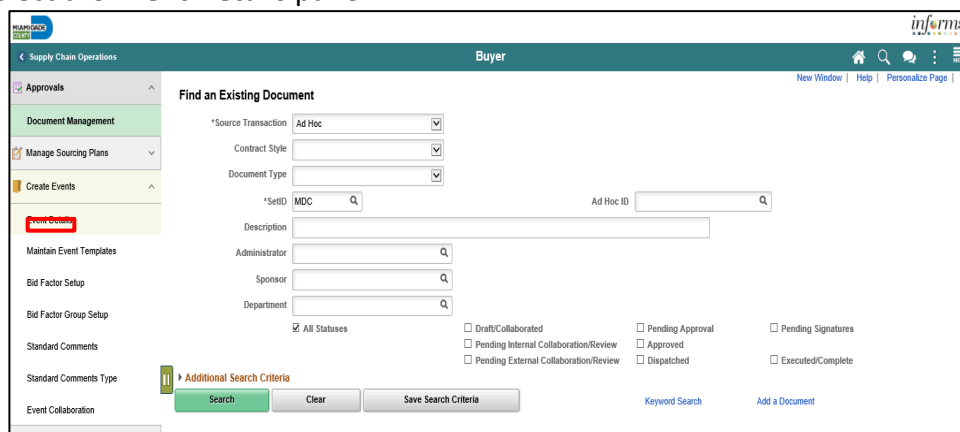
Navigate to: **Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer**
1. Select the **Create Events** pane.

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

Module 7: Analyzing an Event

Lesson 1: View
Merged Files
and Vendor Files

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

4. Input applicable search details.
5. Select the **Search** button.

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

Module 7: Analyzing an Event

Lesson 1: View
Merged Files
and Vendor Files

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

7. Select the **View** or **Download** button.
Note: Ensure pop-up blockers are disabled.

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Module 7: Analyzing an Event

Lesson 1: View Merged Files and Vendor Files

8. Select the **Vendor Files** tab.
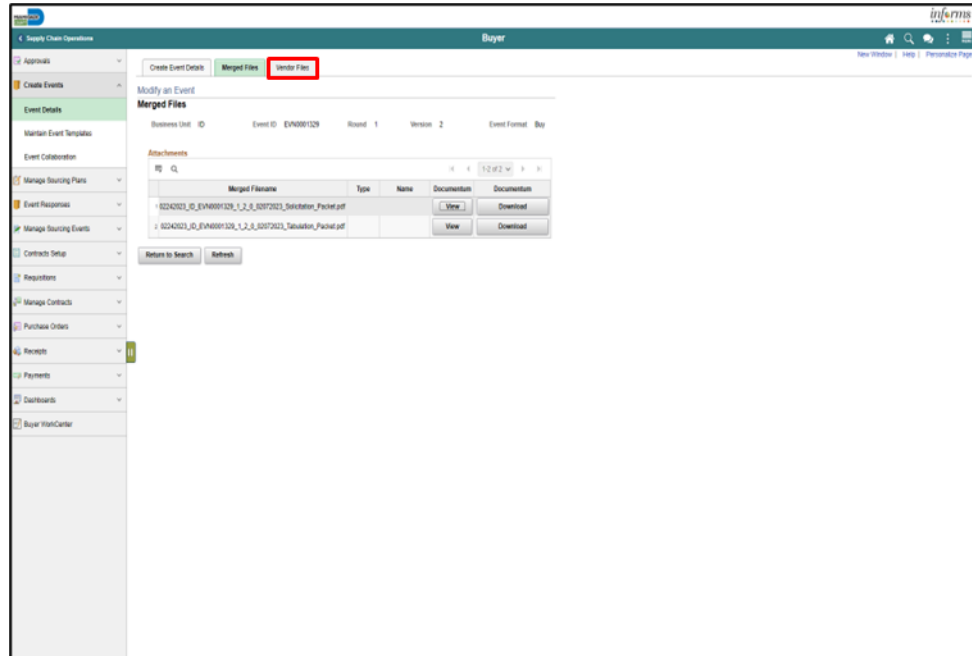
9. Select the **View** or **Download** button.
Note: Ensure pop-up blockers are disabled.
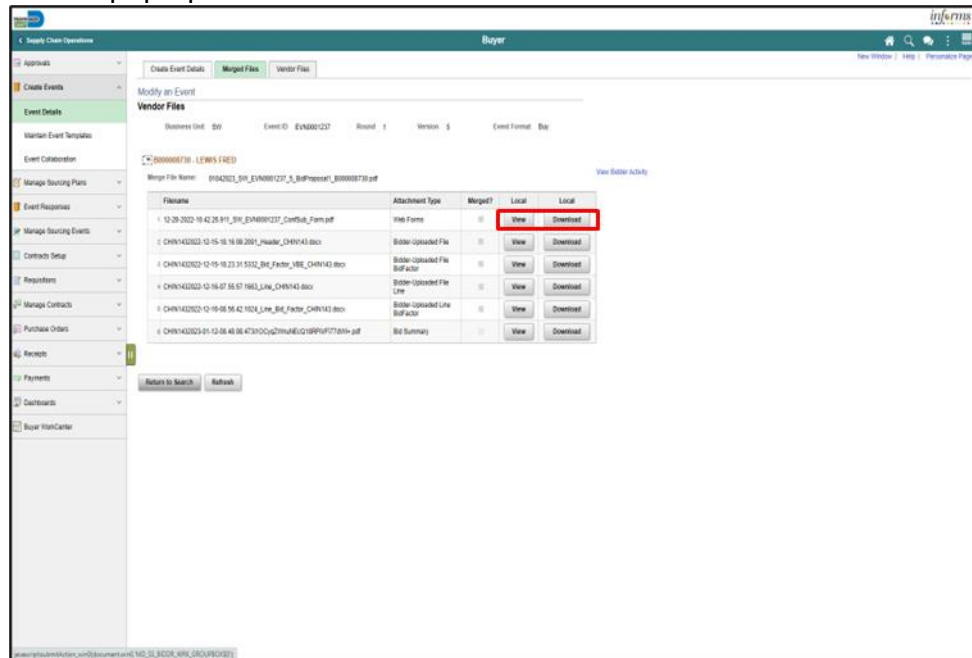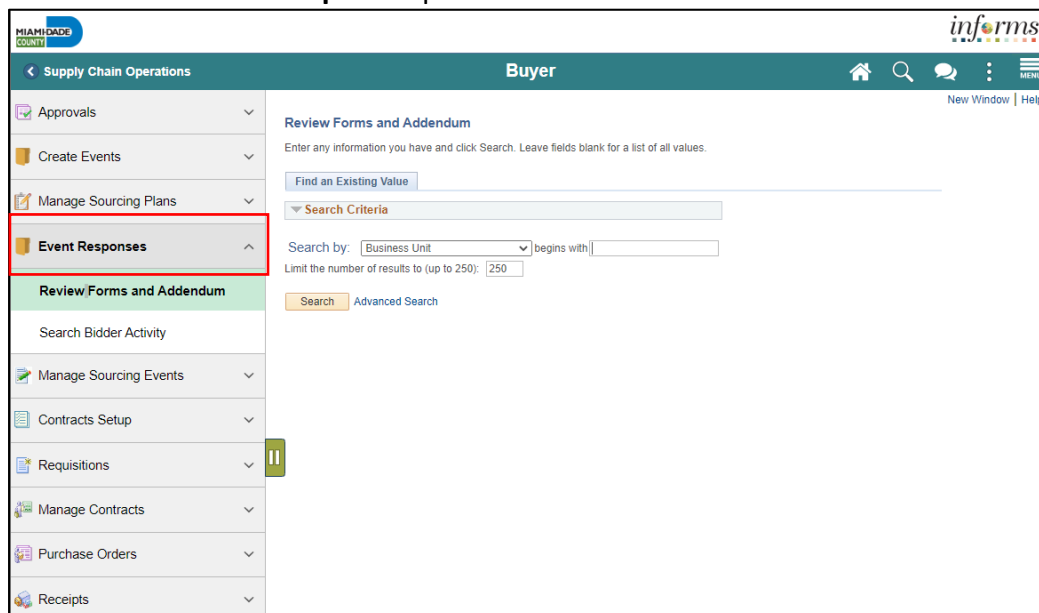
Module 7: Analyzing an Event

**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.
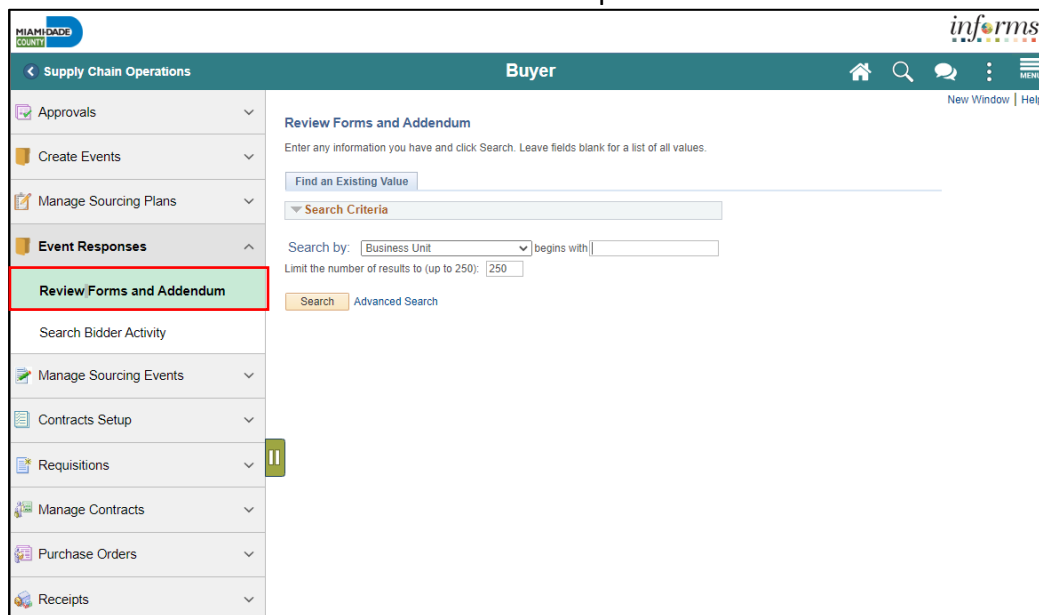
Navigate to: **Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer**
1.   Select the **Event Responses** pane.

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

Module 7: Analyzing an Event

Lesson 2: Review Forms and Addendum

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

4.   Input or search for the applicable **Business Unit** and **Event ID**.
5.   Select the **Search** button.

Module 7: Analyzing an Event

**Lesson 2:
Review Forms
and Addendum**

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

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

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.

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

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

4. Expand the **Legend** menu.

Module 7: Analyzing an Event

Lesson 3:
Analyzing an
Event by
Aggregate

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

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

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.

[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.

Module 7: Analyzing an Event

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

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

Module 7: Analyzing an Event

11. Select the **Recalculate** button.

12. Select the **Save** button.

Module 7: Analyzing an Event

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

15. Select the **Save** button.

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

Module 7: Analyzing an Event

Lesson 3: Analyzing an Event by Aggregate

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

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

Module 7: Analyzing an Event

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

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.

Module 7: Analyzing an Event

Lesson 3:
Analyzing an
Event by
Aggregate

20. Select the **Save** button.

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

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

4. Select the **Analyze Bids** button.

Module 7: Analyzing an Event

5. 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.

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

Module 7: Analyzing an Event

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

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

Module 7: Analyzing an Event

Lesson 4:
Analyzing an
Event by Line

7. Select the applicable options from the **Verification** section for each bidder.
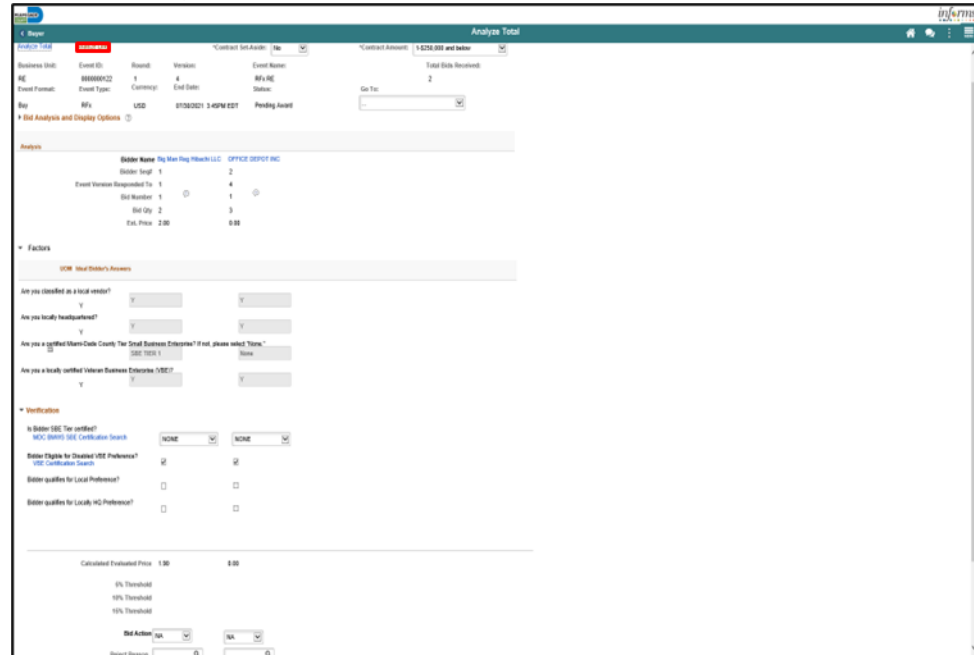
8. Select the **Recalculate** button for each line.
9. Select the **Save** button.
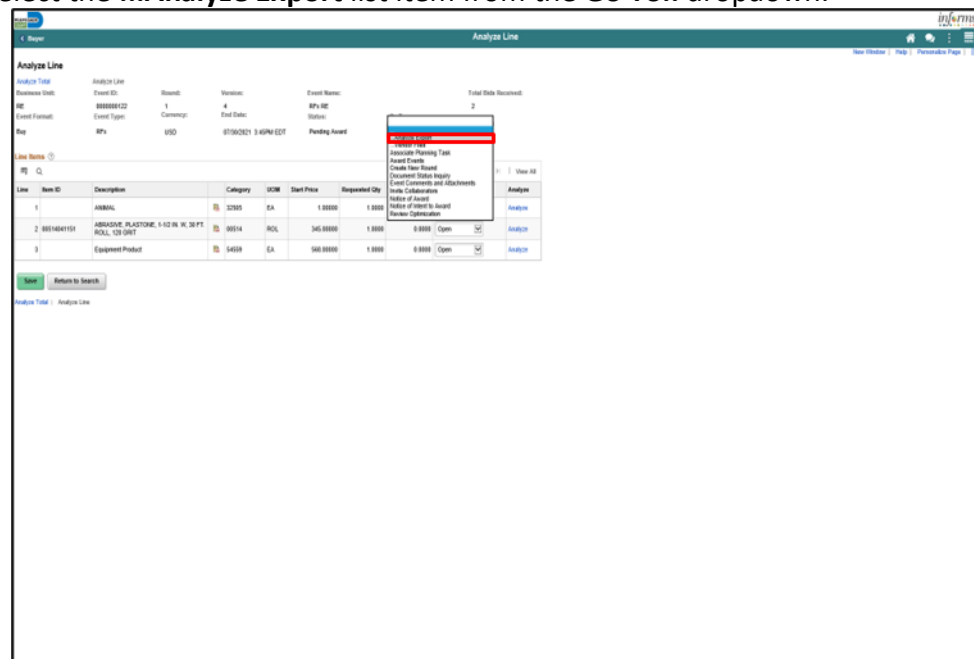
Module 7: Analyzing an Event

**Lesson 4:
Analyzing an
Event by Line**

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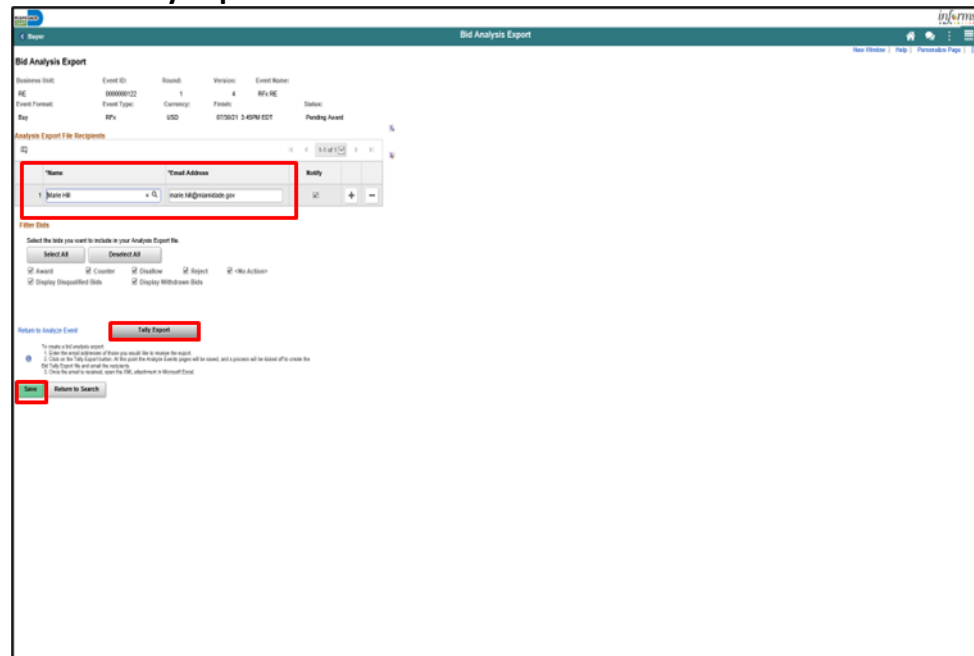
11. Select the **...Analyze Export** list item from the **Go To..** dropdown.

Module 7: Analyzing an Event

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

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

Module 7: Analyzing an Event

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

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

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

Module 7: Analyzing an Event

17. Select the **Analyze** link.

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

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.

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

Note: Repeat steps 17-21 for each line.
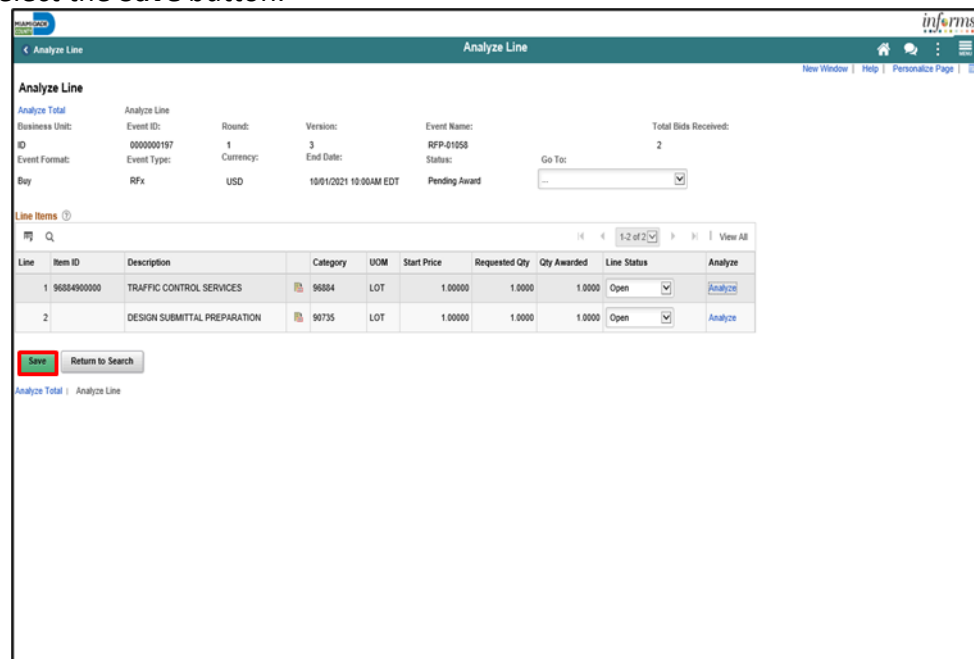
Module 7: Analyzing an Event

21. Select the **OK** button.

22. Select the **Save** button.
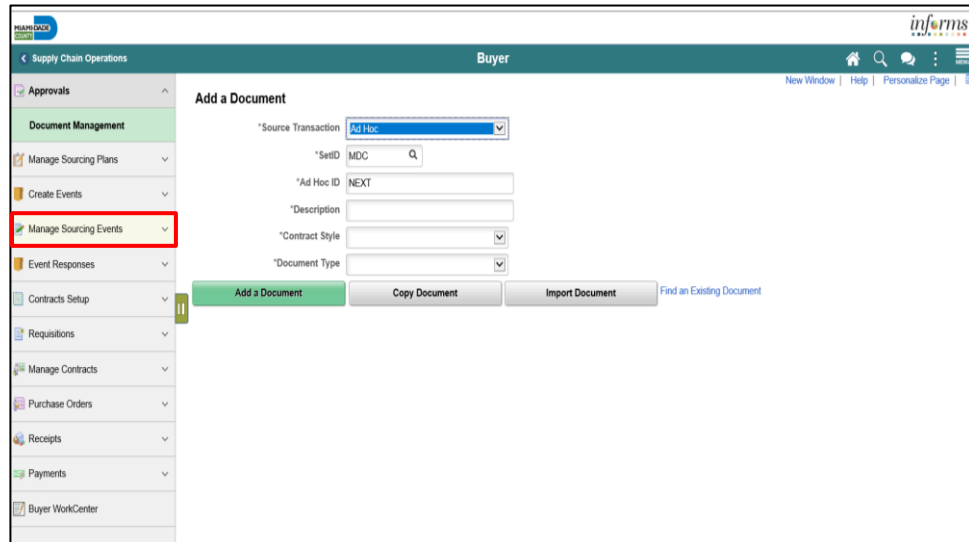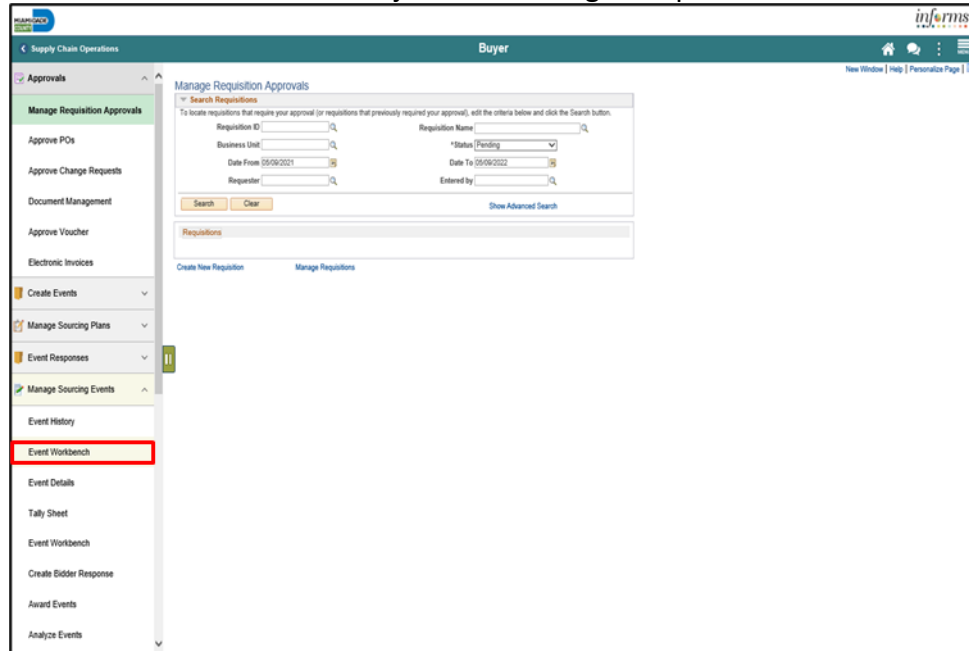
Module 7: Analyzing an Event

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.

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

Module 7: Analyzing an Event

Lesson 5:
Analyzing an
Event by Group

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

4. Expand the **Legend** menu.

Module 7: Analyzing an Event

Lesson 5:
Analyzing an
Event by Group

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

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

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.

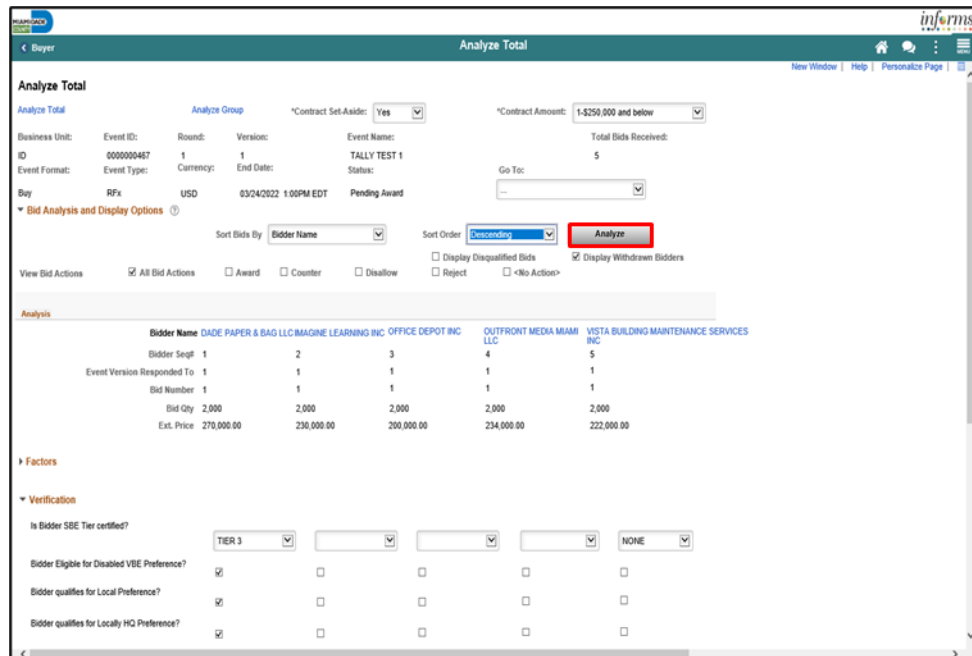**Note**: Select the **Go To:** dropdown to view merged files and view vendor files

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.

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

Module 7: Analyzing an Event

Lesson 5:
Analyzing an
Event by Group

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

11. Select the **Recalculate** button.
12. Select the Save

Module 7: Analyzing an Event

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

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

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Module 7: Analyzing an Event

Lesson 5:
Analyzing an
Event by Group

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

16. Select the **Save** button.

Module 7: Analyzing an Event

Lesson 5:
Analyzing an
Event by Group

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

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

Module 7: Analyzing an Event

Lesson 5:
Analyzing an
Event by Group

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

Module 7: Analyzing an Event

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

20. Select the **Analyze** link.

Module 7: Analyzing an Event

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

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.

Module 7: Analyzing an Event

Lesson 5:
Analyzing an
Event by Group

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

Note: Repeat steps 26 – 28 for each group.

24. Select the **OK** button.

Module 7: Analyzing an Event

25. Select the **Save** button.

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.

Module 7: Analyzing an Event

Lesson 6: Analyze an RFI Event

3. Select the **Pending RFI Review** list item from the **Event Status** field.

4. Select the **Search** button.

Module 7: Analyzing an Event

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

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.

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.

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

Module 7: Analyzing an Event

Lesson 6:
Analyze an RFI
Event

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

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.
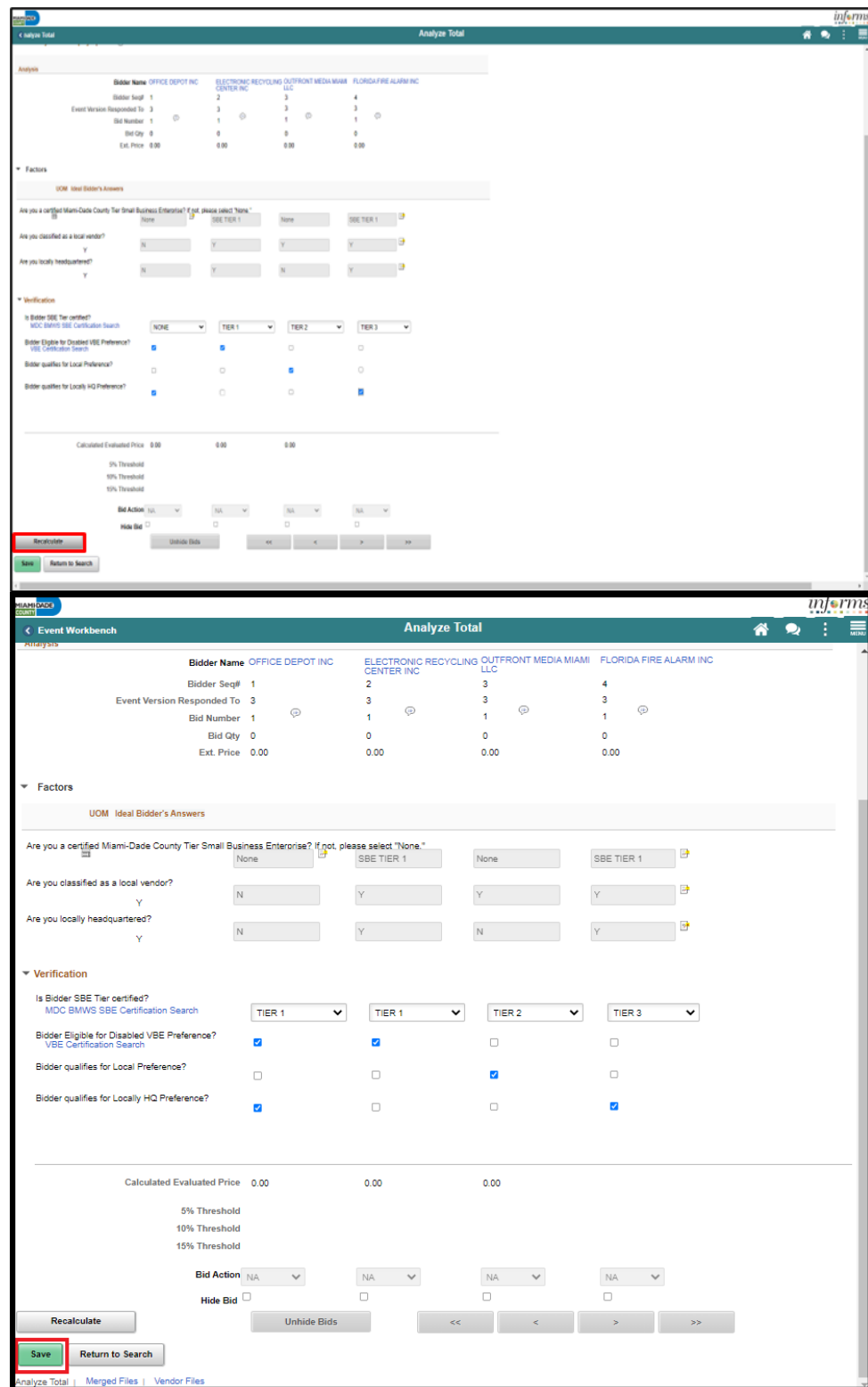
Module 7: Analyzing an Event

11. Select the **Save** button.

Module 7: Analyzing an Event

Module 7: Analyzing an Event Summary

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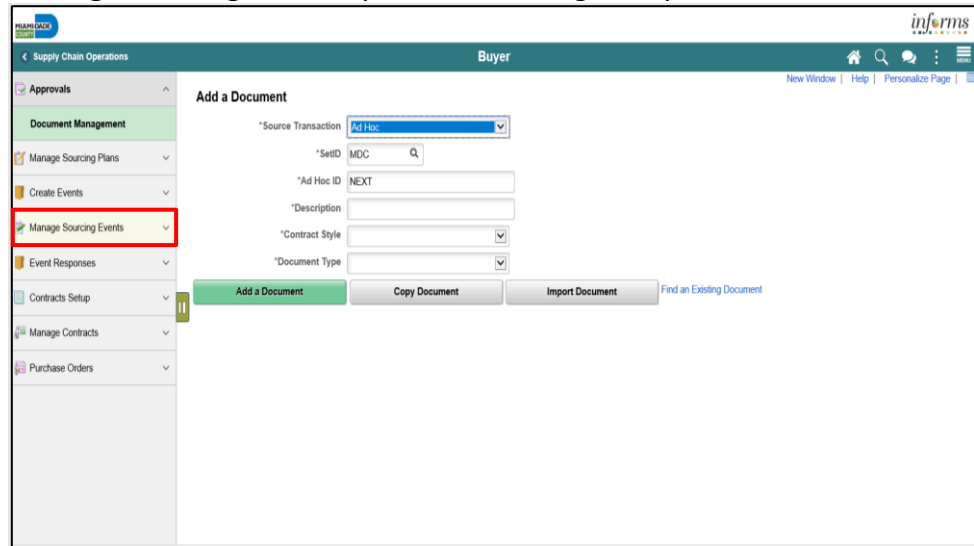
Strategic Sourcing allows for both Bidders and Suppliers to submit bids. In INFORMS, a contract and/or a purchase order can only be issued to Suppliers. In the event a Bidder is pending an award, staff are to advise the Bidders to work with the Vendor Outreach & Support Section of Procurement Department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

Module 8: Award a Buy Event
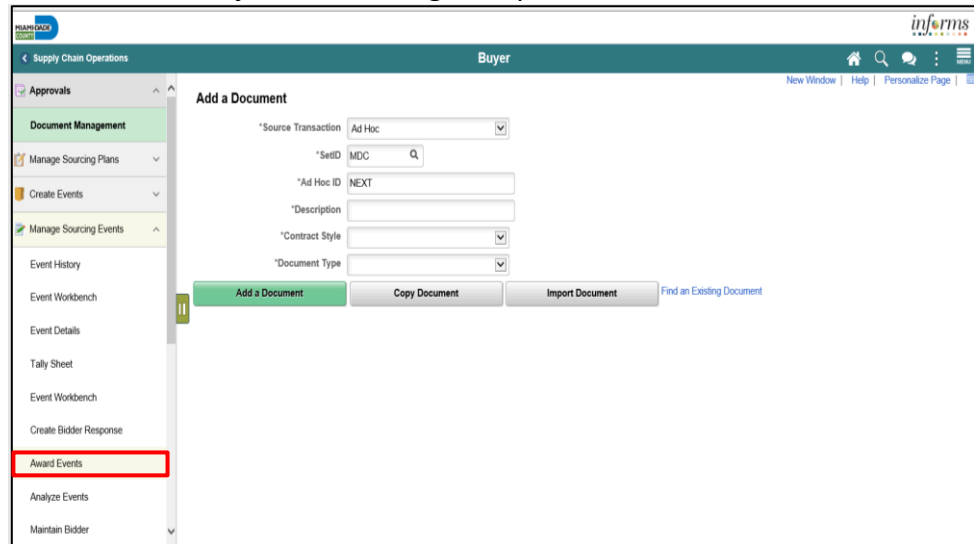
Lesson 1: Award a Buy Event

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

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

2. Select **Award Events** object in the navigation pane.
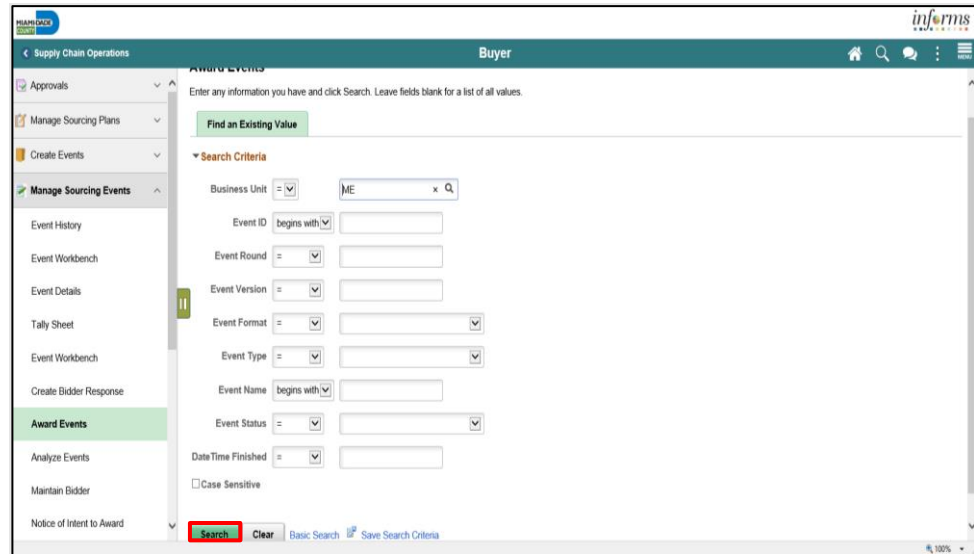
Module 8: Award a Buy Event

Lesson 1: Award
a Buy Event

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

4. Select the **Event**.

Module 8: 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 <u>only</u>.

6. Select **Purchase Order** from the **Contract Style** list.
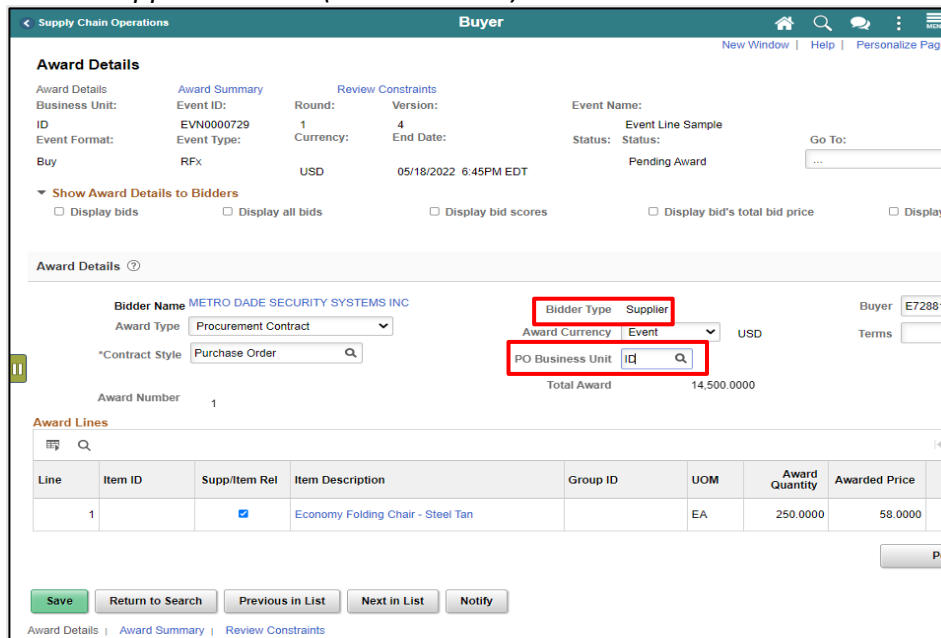
Module 8: Award a Buy Event

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).*

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

Module 8: Award a Buy Event

9. Select the **Save** button.

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

Lesson 2: Change Event Status to Not Awarded

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

1. Select the **Manage Sourcing Events** pane.
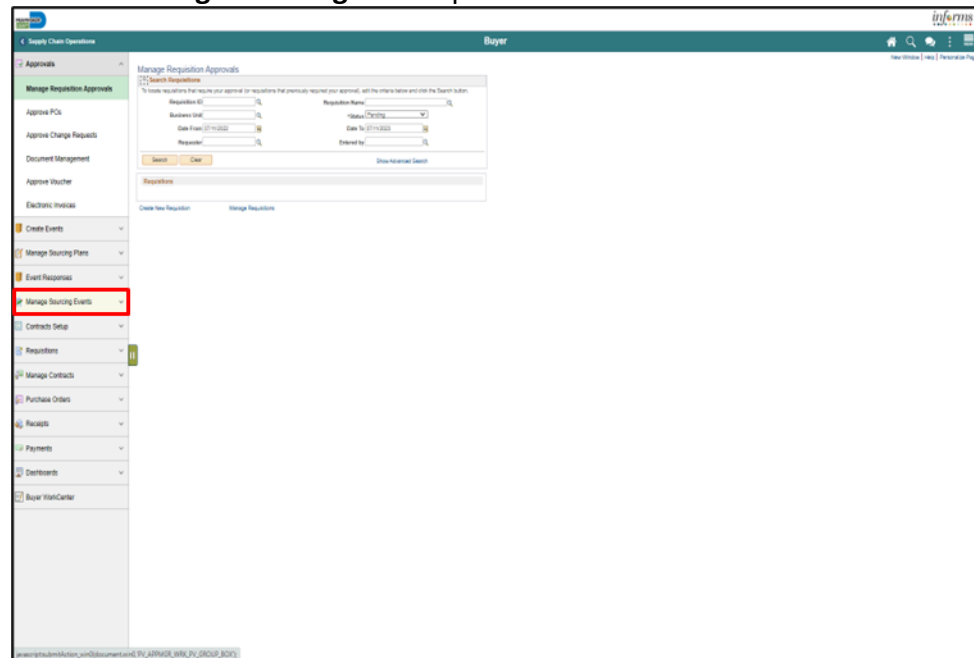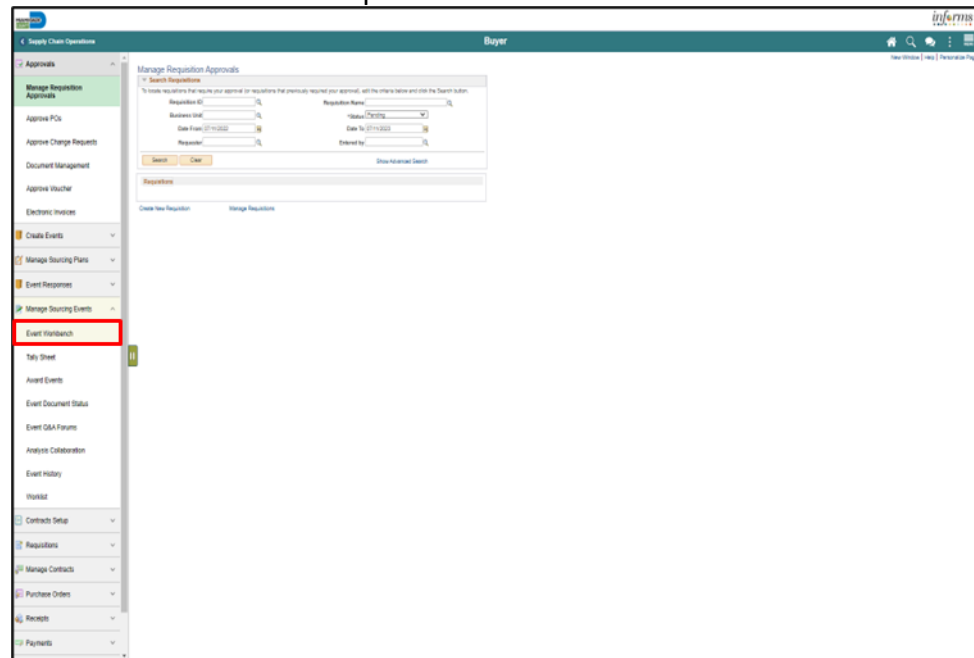
2. Select the **Event Workbench** pane.

Module 8: Award a Buy Event

3. Select the **Event Workbench** pane.
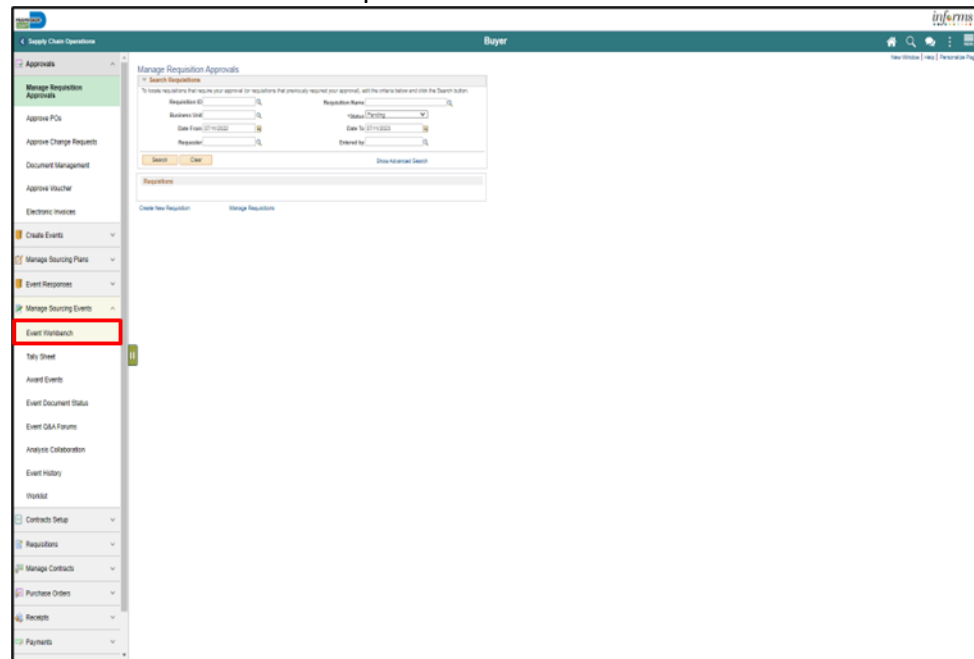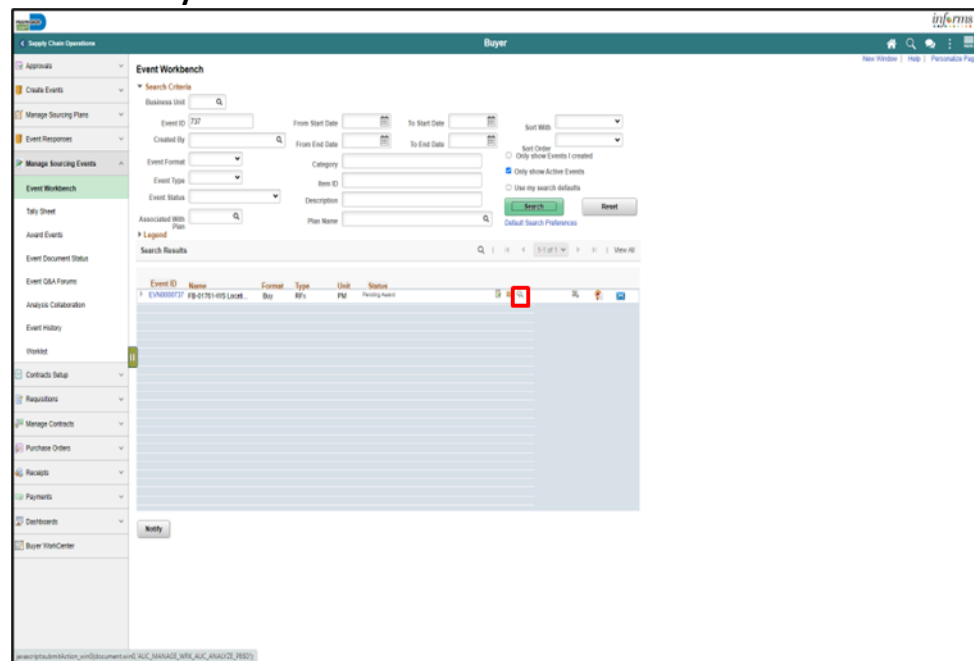
4. Input any applicable search parameters.
5. Select the **Search** button.
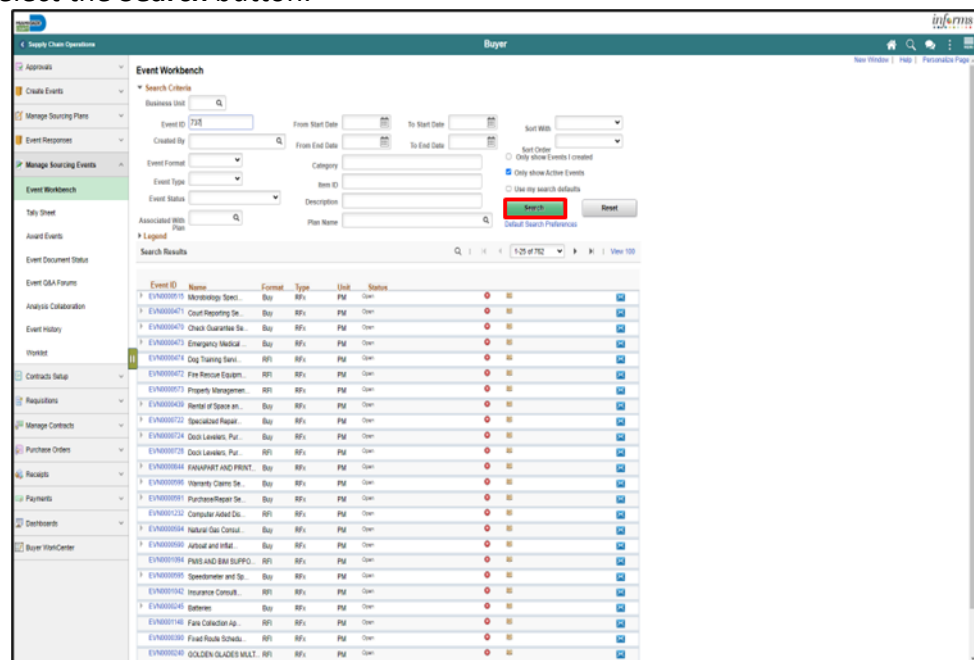
Module 8: Award a Buy Event

Lesson 2:
Change Event
Status to Not
Awarded

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

7. Select the **Contract Set-Aside** list item.
8. Select the appropriate option.

Module 8: Award a Buy Event

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

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

Module 8: Award a Buy Event

12. Select the **Line Status** list item.

13. Select the **Closed** list item.

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**.

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:

- Miamidade.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.

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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	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 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 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
Bid Summary	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. A system generated file that gives a summary of what was submitted.
Vendor Files	All files uploaded by a bidder when submitting a bid. Vendor files are the individual files that were uploaded by the bidder.
Merged Files	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. Combined PDF documents pertaining to the event which include solicitation, tabulation, and bid proposal packets.