PeopleSoft Manual

Strategic Sourcing

Version 20.7-28

Table of Contents

The Event Workbench
Homepage for tracking and locating Sourcing Events
Navigation: Sourcing >> Maintain Events >> Event Workbench

The Event Workbench page provides the opportunity to locate, review, and access event information based on search criteria options. This page offers an alternative to main menu navigations as well. Note: Solicitations on this page are not separated by business unit.

It is suggested to select the checkbox for **Only show Events I Created** to help filter the sourcing events that are relevant.
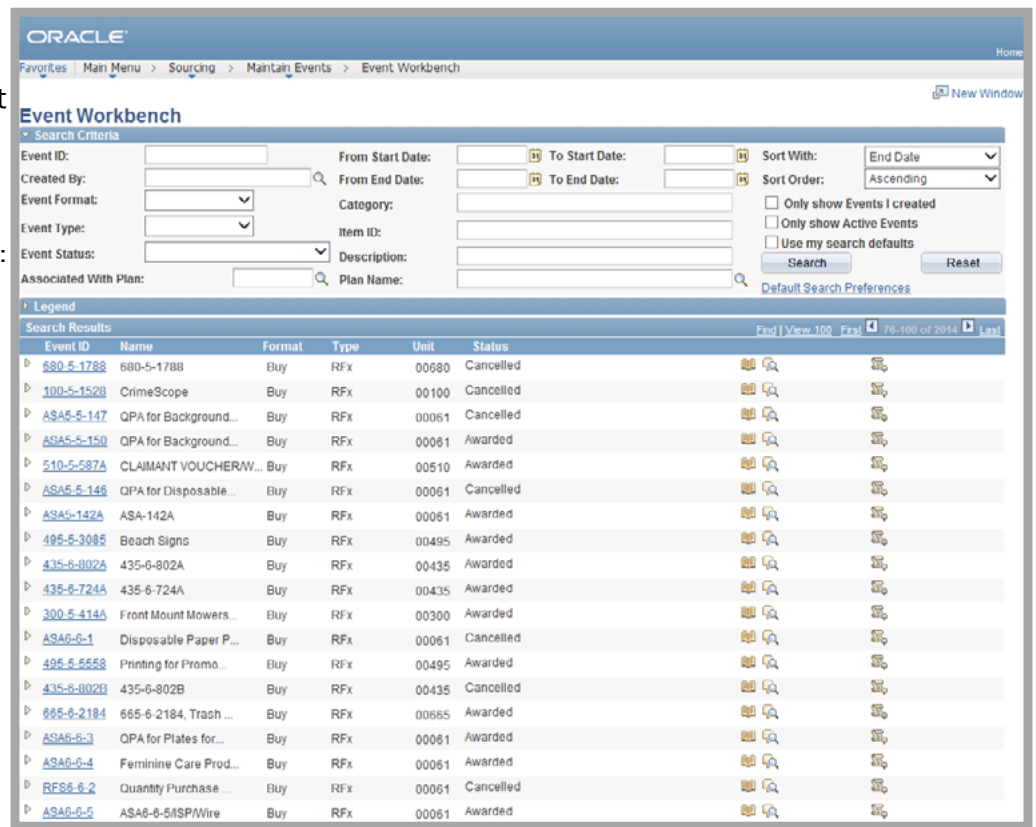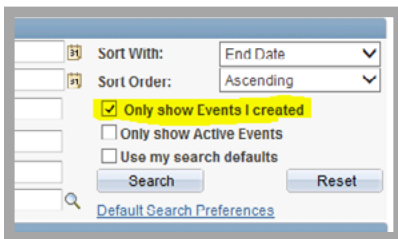

Figure 1 displays the results of a wide-open search based solely on an Event Status equal to **Open**. The most frequently used or preferred search option selections and/or combinations may be set-up as the default through the **Default Search Preferences**.
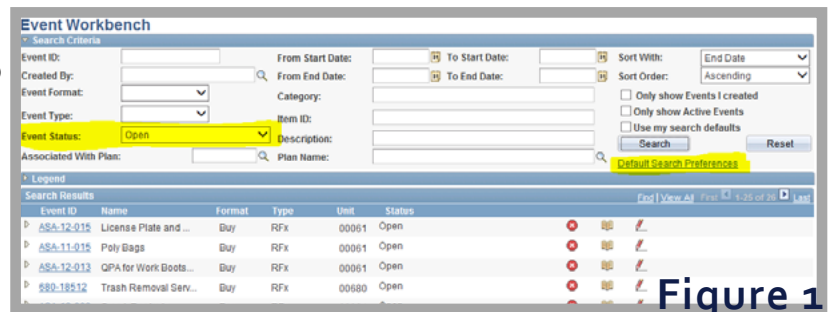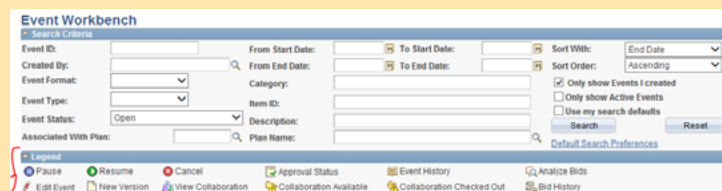

Figure 1

Event ID Icons
Each Event ID uses icons to offer access to functions or information that is allowed based on the current status. The available options will vary as the status of the event changes.

❌ **Cancel Event:** only way an event can be canceled

📖 **Event History:** status of the event and its progression through the module

✏️ **Edit Event:** shortcut to make changes to event summary

🔍 **Analyze Bids:** quick way to go through received bids after bidder responses are entered

📊 **View Bid History:** gives short synopsis of bids received

Event Statuses
The status of the sourcing event will change as the steps are completed.

Open: Event has not been posted

Posted: Event is approved and bidding is ongoing

Event Completed: Event has ended (The bid due date and time have passed)

Pending Award: Event has been completed, but not awarded

Awarded: Event award has been approved; Event is complete

Not Awarded: Event ended without being awarded

Canceled: Event creator canceled the event

Create the Sourcing Event
Getting Started and Event Summary
Navigation: Main Menu >> Sourcing >> Create Events >> Event Details

To create a sourcing event, a run control must be created and we recommend using the requisition number as the Event ID. Leave all other fields defaulted.

1) Enter the **requisition ID number** in the **Event ID** field (use the full 10 digit number)

2) Click **Add**

Note: Event Format should be Buy and Event Type should be RFx

Set-up the Sourcing Event/Solicitation by entering the general information in the Event Summary section at the top of the page.

1) **Event Name:** Enter a brief description of the commodity/service (60 character limit). We recommend using the 3 digit version of the business unit (BU) to begin the event name (Ex: 061 trash removal).

2) **Description:** Enter a more detailed description of the commodity or service. Note: This field can be enlarged and spell-checked . (254 character limit)

3) **End Date:** Enter the **date** and **time** that bidder responses are due based on DPAP regulations.

Note:
Preview Date: Will populate with the current date and time (Used only for reverse auction – leave defaulted)
Start Date: Will populate with the current date and time (Used only for reverse auction – leave defaulted

Create the Sourcing Event
Step 1: Define Event Basics
Navigation: Main Menu >> Sourcing >> Create Events >> Event Details

Click **Event Comments and Attachments** under the Step 1 to include header comments and attachments.
Note: The other links in the Step 1 section will not be used for now and should be left as they default. If you do not need to add any comments, proceed to STEP 2: Configure Line Items.

Adding/Removing Comments and Attachments
Click the plus or minus sign button to add or remove comments and attachments as needed.

Manual Comments
Type free form comments in the text box

> Reference the DPAP Manual for required Comments and Attachments
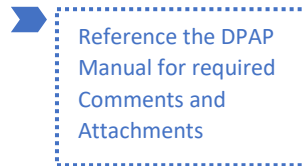
Standard Comments
To insert standard comments use the **Standard Comments** link in the lower right hand corner of the Event Header Comments and Attachments screen. Then select the Std Type and Comment ID and click **OK**.

Attachments
To add an attachment click **Add Attachment**, select the appropriate file, and click **OK**.

NOTE: Check the **Send to Bidder** checkbox if you want the comments to **print on the solicitation.** Check the **Include on Award** checkbox if you want the comments to **appear on the contract or purchase order award.**

Create the Sourcing Event
Step 2: Configure Line Items
Navigation: Main Menu >> Sourcing >> Create Events >> Event Details

Copy the line items from your requisition into your event using the following steps.

1) Click **Line Items**

2) Select **Requisition** from the Copy From drop down, click **Go**

3) Enter the **Business Unit** tied to the Requisition

4) Enter or look-up the **Requisition number**
   Note: The following should default:
   Copy From: Requisition
   Copy Method: Override
   Select Lines: Req Lines

5) Click **OK**
   This will pull all the line items from the requisition

6) Click **Select All** and then **OK** or **select the checkboxes individually**
   Now all line items selected should appear on the Line Items screen

7) Click **Return to Event Overview** to continue creating sourcing event

Note: Requisition line descriptions must be unique when copying to the Strategic Sourcing Event so that the requisition lines will not be combined. If not, the requisition may need to be edited and sent back through approval workflow.

Create the Sourcing Event
Step 3: Select Bidders to Invite
Navigation: Main Menu >> Sourcing >> Create Events >> Event Details

1) Click **Bidder Invitations**
The newly opened (Invite Bidders) page will list the bidders chosen after they have been selected.

2) Click **Search for Bidders** to access the available bidders.

3) In the Search Criteria section, the **Bidder Type** should default to **Bidder**. Select the **Invite UNSPSC?** checkbox and click **Search**
Sourcing will suggest a list of bidders based on the UNSPSC tied to the existing line items. The search will return bidders identified as providing goods/services according to the UNSPSC chosen during registration. You may uncheck the Invite UNSPSC? checkbox and instead search by company name field.

4) Unless the user wants to send the solicitation to all bidders returned, click **Deselect All** and then **select the bidders** you wish to solicit by clicking the checkbox under the Invite column.

The user can invite bidders who are:
A   = Active
I   = Inactive
Blank   = No Vendor File

To make an award the vendor status must be Active (A). To have an active status, vendors must submit their W9 and Direct Deposit Form to the Auditor of State (AOS).

5) Click **OK** at the bottom of the page. The bidder(s) selected will appear on the Invite Bidders page. Can repeat to add more or click minus at the end of the row to remove.

6) Click **Return to Event Overview** to continue creating the sourcing event.

Create the Sourcing Event

Step 4: Invite Collaborators
Navigation: Main Menu >> Sourcing >> Create Events >> Event Details

Ignore this step. The collaboration functionality in Sourcing will not be used for now.

Create the Sourcing Event

Step 5: Post Event

Navigation: Main Menu >> Sourcing >> Create Events >> Event Details

1) Click **Save Event**

2) Click **Post**

3) Click **OK** on the pop-up

Note: The Save As Template and Preview PDF buttons will not be used for now.

Generating the Request for Quotation Form
Run the process to create the solicitation .PDF
Navigation: Main Menu >> Sourcing >> Sourcing Administration >> Invite Bidder PDF

1) Create a new **Run Control** or use an existing one to create the solicitation form

2) Enter the **Business Unit**

3) Enter the **Event ID**

4) Click **Run**

5) On the next screen, select the **checkbox to Invite Bidders**

6) Click **OK**

The process launch will return to the Invite Bidder PDF Run Control page.

7) Click **Process Monitor** to check the status of the process
The process list will open and will display the most recent process run at the top of the list.

8) Click **Refresh** (every 20 or 30 seconds) to update the page as the process runs. When it has completed successfully, the **Run Status** column will display **Success** and the **Distribution Status** will display **Posted**.

9) Click **Details** at the end of the row. The Process Detail page will open.

10) Click **View Log/Trace**

11) Click **PDF file type**
The Request for Quotation/Invitation to Bid PDF will open in a new window/tab.

12) **Save or Print** the document

The document will be addressed to Public Notice to Vendors. Each bidder from which a quote will be requested must be sent a copy of the form in addition to the solicitation package documents. Refer to the DPAP Manual for all regulations.

Enter Bidder Responses
Locate the bidders selected for the Sourcing Event
Navigation: Main Menu >> Sourcing >> Event Responses >> Create Bidder Response

This process should not be completed until the bid due date and time has passed, the evaluation is done, and the DPAP solicitation summary form is completed. Refer to the DPAP Manual for more details.

STEP 1: Select the Bidder

1) Enter the **Business Unit**

2) Enter the **Event ID**

3) Click **Search**

   A list of the bidders will be returned that were set-up during the Create the Sourcing Event stage.

4) Click the **Event ID** link located next to the bidder within the search results that has a response to enter.

5) Click **Enter a New Bid**

   The Event Details page will open. The top of the page   lists information about the Sourcing event.

STEP 2: Comments and Attachments

If there are comments or attachments that need to be associated with this bidder response, click **View/ Add General Comments and Attachments**. Follow the instructions in the Define Event Basics Section.

STEP 3: Enter the Bidder Response

6) **Scroll to the bottom** of the page

7) Enter the **quantity** in the Your Bid Quantity field

8) Enter the **bidder's unit cost** in the Your Unit Bid Price field

Note: If a bidder responded with "no bid" check the No Bid box instead of entering the quantity and cost or leaving their response blank. This tracks that they are a "responsive" bidder and chose not to provide a bid for this solicitation.

9) Click **Save for Later**

10) Click **Yes** to the pop-up

11) Click **Submit Bid**

12) Click **Yes** to the pop-up

13) Click **OK**

This confirmation page confirms the response was successfully "submitted." Clicking OK will return to the Create Bidder Response page. Repeat steps 1-3 to add all the bid responses.

If a bidder responds that was not included during the Select Bidders to Invite step, it has to be an Active Vendor (if the award is being made to it) and have a bidder profile. The user must go back to the Select Bidders to Invite step to add the vendor, then return to this step to enter the response.

Analyze and Award the Event
Review bidder responses and make an award

Locate the Event to Award using search criteria. Suggested search criteria would be **Business unit** and **Event ID**. The Analyze Total page will open by default, which would be used to make a single award to one vendor. If awarding to more than one vendor (split award by line item), use the Analyze Line steps to award.

Make Total Award (Analyze Total)
All line items tied to an event may be simultaneously awarded to a single bidder from the Analyze Total page.

1) Select **Award** in the Bid Action field
   All items will be awarded to the specified bidder
2) Enter **100** in the Award by Percent field
3) Click **Save**

If a mistake was made entering a bidder response, then create a second response and award to it.

Best Practice:
Award all lines on the Strategic Sourcing Event and Cancel unwanted lines from the purchase order.

Save Steps:
To save steps when awarding multiple line items, consider using the **Next Line** and **Previous Line** buttons to navigate from one line to the next.

Make Line Item Split Award (Analyze Line)
Line items may be awarded to different bidders from the Analyze Line page. Specific lines can be awarded to specific bidders from the Analyze Line page by awarding the line quantities individually. (This method can also be used if desired for awarding all lines to a single bidder.)

1) Click **Analyze Line**
   The Analyze Line page will open displaying the line items associated with the event.
2) Click **Analyze** at the end of the line item row to analyze the bidder responses for an item.
   The next page will display each bidder response entered for that specific line.
3) Select **Award** in the Bid Action
   All items will be awarded to the specified bidder
4) Enter **100** in the Award by Percent field
5) Click **Apply**
6) Click **OK**
7) Click **Save**
   Note: Repeat steps for each line item

Issue a PO or Create a Contract
Issue a PO or create a contract
Navigation: Main Menu >> Sourcing >> Maintain Event >> Award Events

1) Use the search criteria options on the Award Events page to **locate and open the event award**.

   The Award Details page will open and display the award information from the previous steps, including the bidder name, the line items, the quantity awarded, and the awarded price.

2) Select the **Award Type**
   (General Contract for a SCM contract; Purchase Order for a PO.)

3) Enter the **Business Unit** in the PO Business Unit field (for a PO or a contract)

4) Enter the **buyer ID** in the Buyer field
   (If not populated by default)

5) Enter the **fiscal year** in the PO ID BY field.
   Use two digits to represent year (ex: 17)

6) Click **Post Award**
   The contract or PO awarded from the Sourcing Event will open in a pop-up window.

Contracts should be completed according to the procedures outlined for Supplier Contract Management (SCM) and POs should be completed following the instruction for purchase orders in eProcurement/Purchasing.

If the user has chosen an inactive (I) vendor (to try to make an award), then he/she will receive the following error message: "*You have attempted to award to an inactive vendor. Either activate the vendor or award to a different bidder*"

The vendor will need to submit the required documents to AOS to become active.

If the user has chosen a blank vendor (to try to make an award), then he/she will receive the following error message: "*Awarded bidder does not exist on the bidder/vendor cross reference table. Bidder must be added to xx table with the corresponding vendor.*"
The vendor will need to submit the required documents to AOS to become active.

Issue a PO or Create a Contract Error Correction
If a PO was Issued instead of a General Contract, then when the PO is displayed complete the following steps

1) Click the red **X** on the PO Header

2) Click **Yes** to "Canceling a purchase order will commit any changes made and prevent further change. Continue?"

3) Leave the radio button as defaulted and Click **Continue** when asked "Would you like to open the Requisition quantity(ies) to be sourced again?"

4) Click **OK** when it returns with "The purchase oder cancelation was successful"

5) Return to **Analyze and Award the Event** to create a General Contract

Event Document Status
Tracking and locating documents associated with events
Navigation: Main Menu >> Sourcing >> Maintain Events >> Event Document Status

Each PeopleSoft module provides a Document Status page, allowing users to locate all associated documents. The search options offer even more flexibility for research.

The Sourcing Document Status Inquiry page will list all documents associated with a Sourcing Event. The Document ID column provide a link to drill into the source document.

At the end of each row, the 📄 icon offers access to even more information by linking to the document status page for the source document itself.

Document History
Record of Document Updates

Version 20.07-28

Redesigned to remove Flash functionality

Version 17.05-02

New Content Added