

State of Oklahoma

COR251

Strategic Sourcing Manual

Office of Management & Enterprise Services



OKLAHOMA

Table of Contents

- Document History 4
- Process Flows..... 5
- Create the Solicitation Event 6
 - Creating a Buy Event from a Requisition..... 6
- Define Event Summary 7
 - Requisition Copy Criteria 8
 - Line Items Page..... 9
 - Advanced Definition Tab..... 10
 - Step 1: Define Event Basics..... 17
 - Step 2: Configure Line Items..... 25
 - Step 3: Select Bidders to Invite..... 26
 - Step 4: Post the Event..... 32
 - Event Approval Inquiry 33
- Creating a Buy Event Without a Requisition..... 34
 - Define Event Summary 35
 - Step 1: Define Event Basics..... 36
 - Step 2: Configure Line Items..... 36
 - Step 3: Select Bidders to Invite..... 44
 - Step 4: Post the Event..... 44
- Creating an RFI Event..... 45
 - Define Event Summary 46
 - Step 1: Define Event Basics..... 47
 - Event Comments and Attachments 50
 - Payment Terms and Contact Info 50
 - Step 2: Configure Event Bid Factors..... 51
 - Step 3: Select Bidders to Invite..... 52
 - Step 4: Post Event 52
- Review/Edit Event 54
 - Creating New Versions (Amendments) 54
 - Creating New Rounds (Counters) 58
 - Review / Track Event 61

Discussion Forum (Q&A)69

Q&A Report.....70

Responding to Bidder Questions.....71

Analyze and Award Bid Responses.....73

 Analyze Bid Responses73

Awarding Bid Responses: Award to Supplier82

 Award Option 1: Award to Supplier83

Awarding Bid Responses: Award to Bidder with Supplier ID.....86

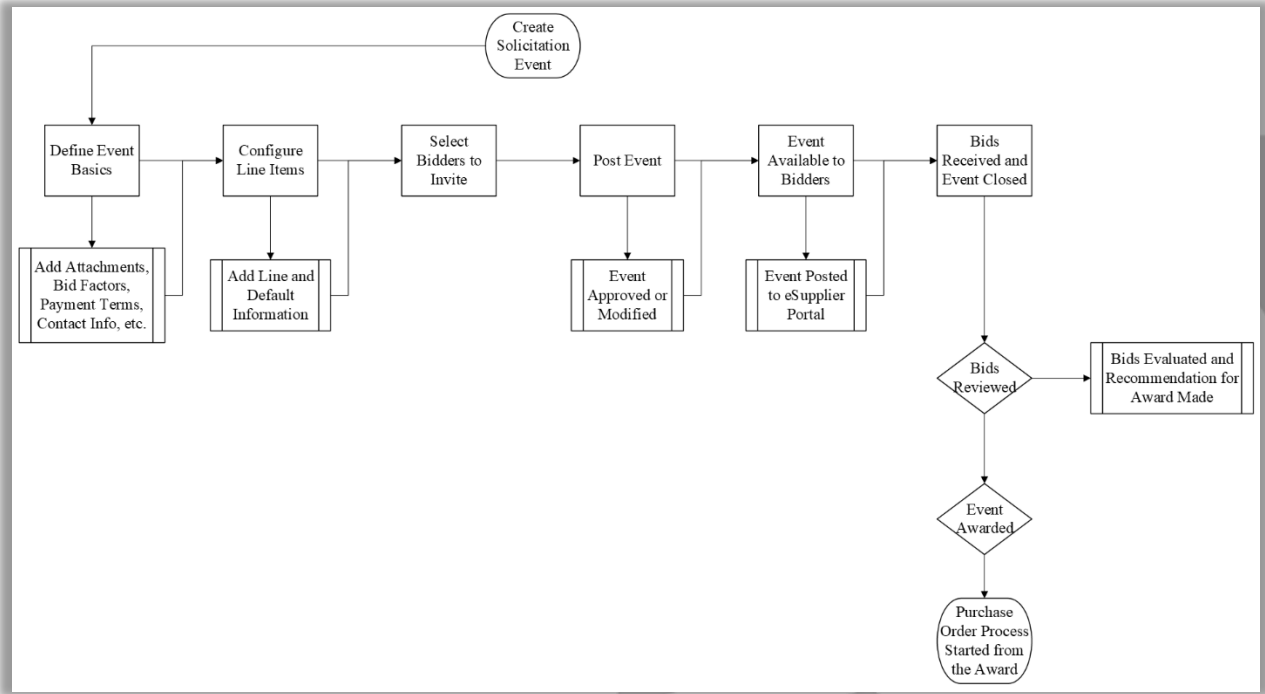
 Award Option 2: Award to Bidder with Supplier ID87

Document History

Document Revision	Date	Description
1.0	06/26/2023	Initial Document Creation
2.0	09/20/2024	Upgrade Update
3/0	05/06/2026	Update Screenshots and ADA Compliance



Process Flows



Create the Solicitation Event

Creating a Buy Event from a Requisition

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

Create Events

Add a New Value Find an Existing Value

*Business Unit

*Event ID

Event Round 1

Event Version 1

*Event Format

*Event Type

Proxy Bidding (Auctions Only)

Business Unit: Required field. Populate with the Agency Business Unit in which the Event is being created.

Event ID: Leave value as NEXT.

Event Format: Options are **Buy, RFI, and Sell**. Select the **Buy** option to create a Buy Event.

Event Type: RFx should be selected when the **Buy** format is selected.

Select the **Add** button to enter the Event Details page.

Define Event Summary

Create an Event

Event Summary

Business Unit 04000 Event ID NEXT Round 1 Version 1 Event Format Buy

Event Type RFX [Change to Auction](#)

Event Status Open

*Event Name TST_EVENT_01

Description Testing Event

Time Zone CDT

Preview Date 05/04/2026 Time 2:13PM

Start Date 05/04/2026 Time 2:13PM

Q & A End Date 05/25/2026 Time 2:13PM

Copy From

Event Name: Required field should hold the general Name of the Event.

Description: Not required, but highly recommended. Enter the purpose of the solicitation in this field.

Preview Date: Defaults to current date. Define the event Preview Date.

Start Date: Defaults to current date. Define the event Start Date.

Q & A End Date: Defaults to 21 days after start date. Define when the bidders' and suppliers' Q&A period closes. The Q & A End Date is normally 14 – 21 days after the bid Start Date depending on the complexity of the event.

End Date: Defaults to 21 days after start date. Define the event End date. The End Date should be between 30-45 days depending on the complexity of the event.

Select the **Save Event Changes** button. This button is not found on the main Event Summary page but can be found by clicking on one of the tabs under the steps.

NOTE: Make sure you are clicking “Save Event Changes” and not “Save Event” (under Step 5 Post Event) as once saved here, the pages cannot be changed without opening a new event round.

Create an Event

Line Items

Business Unit 09000 Event ID EV0000533 Round 1 Version 1 Event Format Buy Event Type RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From Requisition

Filtered View All Lines and Groups

Note the EventID field will change from “NEXT” and is assigned an Event ID by the system.

Copy From Option - Options to copy from a Requisition, Purchase Order, Contract, or a previous event are available.

If copying from a requisition, **click** on the Copy From dropdown and select the **Requisition** option.

Select the **Go** button to the right of the **Copy From** field.

Requisition Copy Criteria

Create an Event

Enter Copy Criteria

Copy Template

Copy From

Select Criteria

Business Unit

*Copy Method

Select Lines

Copy Criteria

Requisition ID

Buyer

SetID

Category

Supplier SetID

Supplier ID

Item ID

Exclude Auto Source Item
 Stockless Item
 Copy all Req/RFQ lines
 Include Inventory Items
 Include Reqs With No Supplier

Copy Method: Select the way the system copies the information. Values are:

- *Override:* The system replaces any existing information for the event with the data from the template.
- *Append:* The system adds information to existing event information but does not write over any fields that contain data. When copying from a specific requisition, this option is used.

Select Lines: Options are RFQ Required, RFQ Not Required, and Req Lines. If copying from a specific requisition, the user will select Req Lines from the Select Lines option.

Copy Criteria: Enter Information regarding the Requisition to copy onto the Event to narrow the search results.

Select the **Search** button.

The Requisition Lines to Copy page shows requisition lines that meet the search criteria entered on the previous page.

Select: Use the Select checkbox to select the requisition line(s) that you want to copy into the Event. Alternatively, use the **Select All** link option.

Click the **OK** button to copy the requisition line(s) into the event.

NOTE: Requisition lines selected will copy all the associated schedules and distribution lines.

Line Items Page

The copied requisition lines will be displayed on the Line Items page. If any adjustments to the Event Lines are necessary (Quantity, Price, Weightings, etc.) need to be made, they can be done here.

Quantity: Enter the number of units to buy.

Start Price: Enter the amount at which the bidding must start if Display and Must Beat Start Price is selected. If an item is selected, the system uses the item's standard unit price as a default.

Weighting: Enter a value to indicate the importance of the line item to the entire event. If you do not enter line weightings, each line item is weighted equally.

In this example, the Line will receive 100% weighting because it is the only line available. If there is more than one line, define the Line Weightings, if necessary.

Select the **Line Details** icon, to the right of the description, to view the full description.

Optionally, use the **Advanced Definition Tab** to access Bid Factors and attach documents or line comments to the Event Lines.

Advanced Definition Tab

Create an Event

Line Items

Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type RFx
Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From Requisition Filtered View All Lines and Groups

Line Items ②

Basic Definition **Advanced Definition**

Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints		
<input type="checkbox"/> 1		FY24 Dell Latitude 7440	1	00000		Details	Bid Factors	No	<input type="button" value="🗨️"/>	<input type="button" value="⊕"/>

Event Total: 39.3700 USD Line Weighting Total: 100 % Remaining Weight: 0%

Group Selected Lines

< Return to Event Overview GoTo

Use the **Advanced Definition Tab** to add additional Bid Factors to the Event Lines or to add line comments or file attachments.

Select the **Details** link to view the details for the line.

Create an Event

Line Details

GoTo Line: 1 - FY24 Dell Latitude 7440

Event ID: NEXT
Line: 1
Item ID:
Description: FY24 Dell Latitude 7440
 Item Biddable Only if Grouped

Requested Quantity: 1,0000
Start Price: 39,3700
Physical Nature: Goods

Shipping Information

Schedule: 1
Quantity: 1,0000
Ship Via: COMMON

Due Date: 10/19/2024
Ship To: 09020050
Freight Terms:
Ship From:

Bid Parameters

Bid Required
Reserve Price:
Bid Quantity Rule: Requested Quantity Required
Alternate UOM: Not Allowed
Min Quantity: 0.0000
Max Quantity: 1.0000

[Item Specification](#)
[Line Image](#)

[Return to Event Lines Page](#)

The Line Details are displayed. If necessary, make any changes to the line details or Bid Parameters.

Bid Quantity Rule:

- *Allow Extra Quantity to be Bid:* Select to allow bidders to place bids for quantities beyond the requested event quantity up to the maximum bid quantity.
- *Bid Up to Maximum Quantity:* Select to allow bidders to place bids up to a maximum quantity for the line.
- *Quantity Not Applicable:* Select for non-item lines, such as extended warranties. Bidders must enter a bid price but not a bid quantity. If you copied from an amount-only *requisition*, this will be the default value for this field and you cannot change it.
- *Requested Quantity Required:* Select to indicate that bidders must place bids for the requested quantity only.

Alternate UOM: Select a value to indicate whether bidders can bid on line items using alternate units of measure.

After reviewing the line details as necessary, **select** the **Return to Event Lines Page** link.

From the **Advanced Definition** page, page 12, select the **Bid Factors** link.

Create an Event

Line Bid Factors

Go To Line: 1 - FY24 Dell Latitude 7440

Line: 1
Item ID:
Description: FY24 Dell Latitude 7440

Bid Factor Weighting Total: 100.00000
Remaining Bid Factor Weight: 0.00000

Bid Factors

Seq Nbr: 1
Bid Factor: PRICE
Question: What price are bidding?

Type: Monetary
Weighting: 100.00000

Display Bid Factor
 Bid Factor Response Required
 Ideal Response Required
 Include on Contract

Best: 0.000000 Worst: 39.370000
[Add Clauses To Bid Factor](#)

Select for deletion

[Add Bid Factors by Group](#) [Select Bid Factors](#) [Delete Selected Rows](#)

Bid Factor Weighting Total: 100.00000
Remaining Bid Factor Weight: 0.00000

[Return to Event Lines Page](#)

[Refresh](#) [Add](#) [Update/Display](#)

Weighting: Enter a value to indicate the importance of the bid factor to the line item. The system then factors weightings into the score. User must enter weightings for bid factors if you want the bid factor responses to be scored.

Display Bid Factor: Select to display the bid factor to the bidder. If this option is not selected, the bid factor is hidden from the bidder, and you can enter a response in the bid analysis pages.

Bid Factor Response Required: Select if the bidder must enter a response for the specified bid factor before successfully posting a bid.

Ideal Response Required: Select if the bidder's response must match the specified best or ideal response for the bid to be eligible for award. Bidders who do not match the specified best or ideal response can still post their bids, but their bids will be disqualified and will not be eligible for award.

Include on Contract: Select if you want the bid factor to be included as a contract agreement if the event is awarded to a supplier contract.

Add Clauses to Bid Factor: Click to access the Assign Contract Clauses page to add contract clauses.

After reviewing the Bid Factor information, **select** the [Return to Event Lines Page](#) link.




Create an Event

Line Items

Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type RFX
Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Requisition [Go] Filtered View: All Lines and Groups [v]

Line Items [?] [Basic Definition] **Advanced Definition**

Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints		
<input type="checkbox"/> 1		FY24 Dell Latitude 7440	1	00000		Details	Bid Factors	No		 

Event Total: 39.3700 USD Line Weighting Total: 0% Remaining Weight: 100%

Group Selected Lines [v] [OK]

< Return to Event Overview GoTo [v] [Go]

[Save Event Changes] [Refresh] [Add] [Update/Display]

From the **Advanced Definition** page, select the comments icon on the right side of the line.

Sourcing Line Comments

Create an Event Help

Line Comments and Attachments

Event ID NEXT Line Number 1

Enter Comments | 1 of 1 | View All

Comments:

Send To Bidder Include On Award [Fetch Item Specs](#) [Standard Comments](#)

Attachments

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
custom_dfs_quote_114141.xlsx	custom_dfs_quote_114141.xlsx	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="View"/> <input type="button" value="-"/>

Use the Line Comments and Attachments page to insert additional line comments or add file attachments to the Event Lines. This can be used to add your working solicitation documents if desired. If used, make sure to uncheck all the boxes as you do not want these documents sent to the bidders. This is NOT where you will post your bid documents.

Select the **Add Attachment** button to insert additional attachments up to 35MB document size.

Select File to create as Attachment

You may attach up to 99 files to upload

No file chosen

Select the **Choose Files** button, then select a file to insert.

Select the **Upload** button to attach the selected file.

NOTE: The **View** button will open a new window to display the attachment.

Select the **OK** button to return to the Event Lines page after all comments and file attachments are added.

From the Event Lines page, page 11, Select the **Return to Event Overview** link.

NOTE: Buy Events can also be created by copying from Contracts or Purchase Orders. Those options can be selected on the Event Summary page, page 7, in the **Copy From** field. The same steps will be executed shown on pages 10-16 for creating the event by copying from a Contract or Purchase Order.

Create an Event

Event Summary

Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format Buy

Event Type RFX [Change to Auction](#)

Event Status Open

*Event Name TST_EVENT_01

Description Testing Event

Time Zone CST

Preview Date 09/23/2024 Time 8:52AM

Start Date 09/23/2024 Time 8:52AM

Q & A End Date 10/14/2024 Time 8:52AM

End Date 11/07/2024 Time 8:52AM

Copy From

If copying from a Purchase Order, the copy page will appear as follows:

Create an Event

Enter Copy Criteria

Copy Template

Copy From Purchase Order

Select Criteria

Business Unit 09000

*Copy Method Append

Copy Criteria

Purchase Order

Buyer

SetID

Category

Contract SetID

Supplier SetID

Item ID

Contract ID

Supplier ID

Copy Method: Select the way the system copies the information. Values are:

- *Override:* The system replaces any existing information for the event with the data from the template.
- *Append:* The system adds information to existing event information but does not write over any fields that contain data. When copying from a specific Purchase Order, this option is used.

Select/Copy Criteria: Enter Information regarding the Purchase Order to copy into the Event to narrow the search results.

Select the **Search** button.

If copying from a Contract, the selection page will appear as follows:

The screenshot shows a web form titled "Create an Event" with a sub-section "Enter Copy Criteria".

- Copy Template:** A dropdown menu with "Contract" selected.
- Select Criteria:**
 - SetID: Text input with "00000" and a search icon.
 - *Copy Method: Dropdown menu with "Append" selected.
 - Process Option: Dropdown menu with "Purchase Order" selected.
 - Contract ID: Text input with a search icon.
- Copy Criteria:**
 - SetID: Text input with a search icon.
 - Category: Text input.
 - Supplier SetID: Text input with a search icon.
 - Supplier ID: Text input with a search icon.
 - Item ID: Text input.
 - Include Cancelled Lines

A "Search" button is located at the bottom left of the form.

Copy Method: Select the way the system copies the information. Values are:

- *Override:* The system replaces any existing information for the event with the data from the template.
- *Append:* The system adds information to existing event information but does not write over any fields that contain data. When copying from a specific contract, this option is used.

Contract ID: Enter the Contract ID you wish to copy from.

Select/Copy Criteria: Enter information regarding the Contract to copy onto the Event to narrow the search results.

Select the **Search** button.

Step 1: Define Event Basics

Event Settings and Options

Step 1: Define Event Basics

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

* Event Settings and Options
Event Comments and Attachments
Event Header Bid Factors

Payment Terms and Contact Info
Event Constraints

Event Reminder Notification

Select the Event Settings and Options link.

Create an Event

Event Settings and Options

Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type RFX

Create PDF on Event Post

Allow Bidder XML Downloads

Bid Required On All Lines

Multiple Bids Allowed

Allow Edit of Posted Bids

Do Not Use Best Bids on New Rounds

Display Bid Factor Ideal Value

Allow Send NOIA Notification

Round/Version Display Display Round and Version

Sealed Event

Display Bid Factor Weightings

Display Bid Factor Best/Worst

Notification to be Sent Specific Bidders

Allow Send NOA Notification

Notification To be Sent Only Awarded Bidders

*NOIA Report Template AUC_NOIA_1

Award Only after Notice End

*Award Template AUC_NOA_1

*Non-Award Template AUC_NONA_1

Factor Event Score Into Total Score

Header Weighting

Line Factor Weighting

Start Price Do Not Display

Bidders May Create Line Groups

Allow Price Breaks with Groups

Minimum Response and Warning

Minimum number of bid response Number of days warning prior

Associated Categories

[Save Event Changes](#)

GoTo [Go](#)

[Return to Event Overview](#)

The Event Settings and Options page allows the user to define details for the entire Event. Most of the fields will default in and generally should not be changed unless known to the user.

Round/Version Display: Select one of these options:

- *Display Round*
- *Display Round and Version*
- *Do not Display*

If applicable, select a **NOIA Report Template**, **Award Template** and **Non-Award Template**.

Display Bid Factor Best/Worst and **Display Bid Factor Ideal Value**: Select to show the best and worst values for the bid factor or the ideal value for the bid factor on the Create Bid Response page. If you deselect these options, then bidders will not be able to see the best and worst values or the ideal value for a bid factor on the Create Bid Response page.

Create PDF on Event Post: Select to create a PDF version of the sourcing event. If this option is not selected, PDF creation is suppressed.

Allow Bidder XML Downloads: Select to enable bidders to download events to an XML file. If this option is not selected, a PDF version of the sourcing event is created; however, an XML version is not created when the events are posted.

Bid Required On All Lines: Select this check box if you require bidders to bid on all lines on the event.

Multiple Bids Allowed: Indicates whether bidders (for RFX events) can post multiple bids on the same event.

Allow Edit of Posted Bids: Indicates whether bidders (for RFX events) can edit their posted bids until the event ends.

Do Not Use Best Bids on New Rounds: This setting defaults from the Sourcing Business Unit Definition page based on the business unit. However, you can change the setting at the event level here. Select to indicate that new rounds should not be created using best bids when the bids are countered. If you select this option, then bidders will not be able to accept the counter offer on the Create Bid Response page; bidders will be forced to rebid. In this scenario, bidders will still be able to either counter or withdraw the bid.

Display Bid Factor Ideal Value: Select to show the best and worst values for the bid factor or the ideal value for the bid factor on the Create Bid Response page. If you deselect these options, then bidders will not be able to see the best and worst values or the ideal value for a bid factor on the Create Bid Response page.

Allow Send NOIA Notification: Select to send a communication to the bidders that they have been identified for awarding a PO or contract

Generally, the **Create PDF on Event Post** box is unchecked and the **Bid Required on All Lines** box is checked.

Header Weighting: Enter a default weighting for how the system weights the header score in relation to the total score. The default value comes from the Sourcing Business Unit Definition page, but you can change it here.

- For example, assume that you set the default event header weighting to 20 percent, and then you create an event with three lines. Line 1 is weighted 50 percent, line 2 is weighted 20 percent, and line 3 is weighted 10 percent. The total weighting of the lines is 80 percent plus the defaulted weighting of the header (20 percent), totaling 100 percent if you selected to factor the header score into the total score.

Factor Event Score Info: Select to indicate that you want the system to factor the header score into the total score for the event or the individual line score.

Start Price: Select whether the Start Price is displayed.

Minimum Number of Bid Responses: Enter a number if a minimum number of bids is required. If the number of bidders' responses is less than the value specified in this field, then an alert will be displayed on the Procurement Operations Home Fluid pages under the My Sourcing Events tile and on the Navigation bar. If this field is left blank, no Alerts will be displayed for this event.

Select the arrow left of the Associated Categories heading to expand the section.

Input the Category Codes to be associated with the event. If the category codes are not known, it can be found on the Line Items page of the event, shown on page 11, when being copied from a requisition.

After reviewing the Event Settings and Options, select the **Return to Event Overview** link.

Event Comments and Attachments

Step 1: Define Event Basics

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

* Event Settings and Options
 Event Comments and Attachments
 Event Header Bid Factors

Payment Terms and Contact Info
 Event Constraints
 Event Reminder Notification

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

Use the Event Header Comments and Attachments page to insert additional header comments or add file attachments to the Event Header. This is where the user will enter all the bid documents that bidders will respond to.

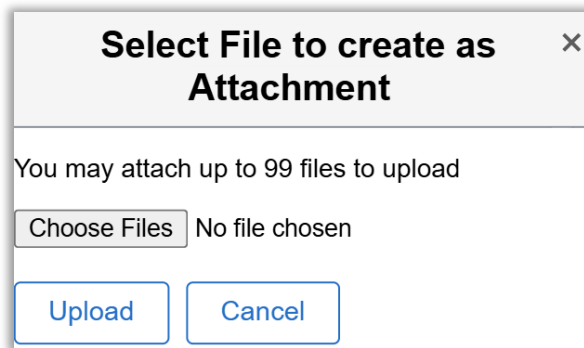
Send to Bidder: Select to enable the bidder to see the comment.

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

NOTE: This page attaches files and comments at the Event Header level.

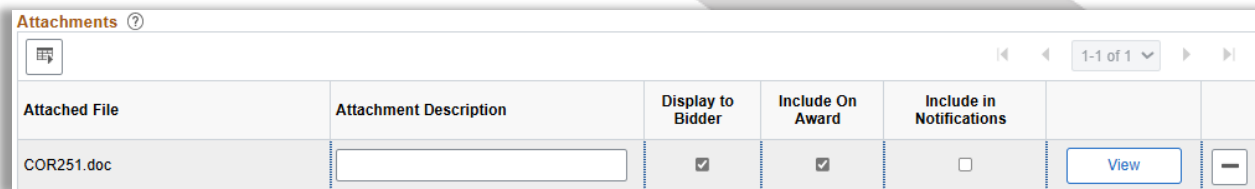
To add or delete additional comments, use the plus and minus (+/ -) buttons.

Select the **Add Attachment** button to insert an attachment.



Select the **Choose Files** button and select a file to add as an attachment.

Select the **Upload** button to attach the file.



Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications		
COR251.doc		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View	-

Display to Bidder: Select to enable the bidder to see the comment.

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

Include in Notifications: Select to include the attachment in the event invite and event interest notifications that are sent to the bidders.

Generally, do not select **Include in Notifications** when initially creating an event. When this is selected, all attachments are included in email notifications.

NOTE: User must select the Display to Bidder and Include on Award checkboxes if they want the attachments or comments to display. If none are checked the Supplier will get an error on the public portal.

Select the **OK** button to return to the Event Summary page after all comments and file attachments are added. It is highly recommended to click the **Save Event Changes** button after attaching any documents.

Event Header Bid Factors

Step 1: Define Event Basics

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

* [Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)
[Event Constraints](#)

[Event Reminder Notification](#)

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

Modify an Event

Event Bid Factors

Event ID EV00000533 Bid Factor Weighting Total 100.00000
 Event Name TST_EVENT_01 Remaining Bid Factor Weight 0.00000

Bid Factors ?

Seq Nbr 1 + -

*Bid Factor SALES_TAX

Question Do you have an Oklahoma Sales Tax Permit?

Weighting 100.00000

Type Yes/No

Display Bid Factor?
 Bid Factor Response Required
 Ideal Response Required
 Include on Contract

Yes/No
 Yes No

[Add Clauses To Bid Factor](#)

Select for deletion

The Event Bid Factors page will default in the bid factor questions that are included on all state events when copying a requisition onto an event.

NOTE: When creating an event from scratch, this page will default without Event Header Bid Factors. After inputting line item details and saving the event, the default Bid Factors will appear on this page. These Bid Factors do **not** need to be entered manually when creating an event from scratch.

If a specific Bid Factor question needs to be added, **select** the **plus** (+) button to insert a new question below that sequence. For example, if the plus button is clicked in the first sequence, a new question will be added as the second sequence. **Select** the **minus** (-) button to delete a question.

Bid Factor: Choose from a list of predefined Bid Factor templates. When adding new Bid Factors, click the lookup icon to the right of the bid factor field, and select an option. This will default the remaining fields. Bid Factors can also be searched for by selecting the **Select Bid Factors** link.

Weighting: Enter a value to indicate the importance of the bid factor to the line item. The system then factors weightings into the score. The user must enter weightings for bid factors if you want the bid factor responses to be scored.

Display Bid Factor: **Select** to display the bid factor to the bidder. If this option is not selected, the bid factor is hidden from the bidder, and you can enter a response in the bid analysis pages.

Bid Factor Response Required: Select if the bidder must enter a response for the specified bid factor before successfully posting a bid.

Ideal Response Required: Select if the bidder's response must match the specified best or ideal response for the bid to be eligible for award. Bidders who do not match the specified best or ideal response can still post their bids, but their bids will be disqualified and will not be eligible for award.

Add Clauses to Bid Factor: Select to access the Assign Contract Clauses page to add contract clauses.

Include on Contract: Select if you want the bid factor to be included as a contract agreement if the event is awarded to a supplier contract.

Add Bid Factors by Group: Select this link to search for Bid Factor groups to be included.

After reviewing the Bid Factor questions, select the **Return to Event Overview** link.

Payment Terms and Contact Information

Step 1: Define Event Basics

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

* Event Settings and Options
Event Comments and Attachments
Event Header Bid Factors

Payment Terms and Contact Info
Event Constraints

Event Reminder Notification

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

Create an Event

Event Contact Details

Payment & Currency Information ?

*Currency	USD <input type="text"/>	Exchange Rate	*Rate Type	CRRNT <input type="text"/>
Pay Method	<input type="text"/>		Rate Date	09/23/2024 <input type="text"/>
Payment Terms	<input type="text"/>		<input type="checkbox"/> Allow bids in other currencies	
Bill Addr	09000 <input type="text"/>		<input type="checkbox"/> Tax Exempt	
Buyer	BBENN06 <input type="text"/>		Exempt ID	<input type="text"/>

Event Contact ?

Contact Name

Email ID

Phone

[< Return to Event Overview](#)

Pay Method: Optionally, populate the payment method for the PO that will be generated from the Event Award.

Payment Terms: Optionally, populate the payment terms for the PO that will be generated from the Event Award. Generally, 45 is used for the Payment Terms. Payment Terms are net 45 by statute unless an early pay discount is offered.

Buyer: Defaults to the Buyer creating the Event. Select a user to be assigned to this event.

NOTE: If the buyer needs to be updated after the event has been posted, the user will need to **Create a New Version** from the Event Workbench, shown later in this manual. This will need to be approved before being posted to the website again.

Contact Name: This is generally the Buyer name. This will print at the top of the paper bid document and be visible at the top of the page when suppliers are bidding electronically.

Email ID: This should hold the Email of the Event Creator (Buyer). System generated emails will be sent to the address including undelivered emails to invited bidders. This email will be visible to bidders when responding electronically and allow them to send emails directly to this email address with questions, etc.

Phone: Generally, the buyer phone number. This will print at the top of the paper bid document and be visible at the top of the page when suppliers are bidding electronically.

Ensure the Bill To Address and Buyer Email ID & Phone fields are correct.

Select the **Save Event Changes** button.

Select the **Return to Event Overview** link to return to the main Event Summary page.

Event Reminder Notification

Step 1: Define Event Basics

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

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)
[Event Constraints](#)
[Event Reminder Notification](#)

Select the Event Reminder Notification link.

Create an Event

Event Reminder Notification

Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type RFX

Allow Event Reminder Notification

Event Reminder Notification Options

 1-1 of 1 View All

Sequence	*Day(s) Prior to Event End Date	Notification Date	*Audience	*Message Priority		
1	3	10/11/2024	All	High	+	-

Notification to Event Creator Day(s) Prior to Event End Date

[< Return to Event Overview](#) GoTo

The Event Reminder Notification page can be used to define the configuration settings for sending notifications. By default, the page displays the details specified on the Sourcing - Business Unit Definition page, if specified. You can modify the values, if required.

If the event end date is less than the Event Notification dates, a message displays when you save it. You can either modify the notification date or proceed with the existing date. If you have not modified the end date, the same message displays again when you post the event.

The bidders or suppliers receive a notification when the process request is submitted successfully.

NOTE: For already sent notifications, the particular row is displayed as read only.

Step 2: Configure Line Items

Step 2: Configure Line Items

Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

Select the [Line Items](#) link.

Create an Event

Line Items

Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Filtered View:

Line Items [?]

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting		
<input type="checkbox"/> 1	<input type="text" value=""/>	FY24 Dell Latitude 7440	43211600	EA	1.0000	39.3700	\$39.37	100.00000	+	-

Event Total: 39.3700 USD Line Weighting Total: 100% Remaining Weight: 0%

Group Selected Lines:

[< Return to Event Overview](#) Go To:

Since this example was copied from a Requisition, the Line Item page was completed on previous pages.

Review the information on the Line Items page to ensure it is valid and make any necessary changes, then **select the [Save Event Changes](#) button.**

Select the [Return to Event Overview](#) link.

Step 3: Select Bidders to Invite

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

* [Bidder Invitations](#)

Select the [Bidder Invitations](#) link.

Create an Event

Invite Bidders

Business Unit 09000 Event ID EV00000533 Round 1 Version 1 Event Format Buy Event Type RFX

Public Event

Bidder Invitation List ?

Search for Bidders Save Bidders as Group

Bidder ID	Bidder Type	Status	Location	Bidder Company	Category	Diversity	*Dispatch Method
PUBLIC_AUC	Public		1	This is a Public Event			Email

Save Event Changes Upload Contacts from file GoTo [] Go

< Return to Event Overview

The Invite Bidders page shows the list of all Suppliers that have been invited to bid on the Event. At this point in the Event creation, no Suppliers have been invited.

In most cases, the **Public Event** checkbox should be selected to allow the event to be posted to the public supplier portal. This will default the information shown above into the Bidder Invitation List.

This is where you will add any suggested bidders as well as the agency CPO and any others you want to receive a notification. Make sure to include yourself if you want to receive a notification.

To invite specific bidders, **select** the [Search for Bidders](#) link.

The **Search** button retrieves all Suppliers that match the Search Criteria defined in the top of the page.

The **Recommend Bidders** button looks for duplicates in the search results. **Select** to Search for matches by Bidder Type and the items or item categories in the event lines.

NOTE: These two (2) buttons should be used in combination together. The user should click the Search button, then the Recommend Bidders button to remove some duplicates.

Used Saved Search: User has the option to save Search Criteria to be used with the Save Search Criteria link. Once saved, the search criteria is saved in this dropdown.

ID: This is the Bidder/Supplier ID for a specific Bidder/Supplier if you wish to search for a specific one.

The **Category Criteria** and **Profile Question Criteria** sections can be expanded to access more search criteria by clicking on the arrow to the left of the section name.

Category: Enter the category code associated with your bid.

Maximum Rows retrieved: Increase the number of suppliers displayed in the Search Results section if necessary. 9998 is the maximum allowed value.

Enter search criteria and **select** the **Search** button then click the **Recommend Bidders** button.

Bidder Search

[Help](#)

Search Results

1-50 of 50 | View All

Bidder ID	Bidder Type	Status	Location	Name	Bidder Company	Open for Ordering	Category	Diversity	Invite
1 0000014268	Supplier	Approved	0006	ALEX BALLESTEROS	SHI INTERNATIONAL CORP	Yes			<input type="checkbox"/>
2 0000018545	Supplier	Approved	0001		RENAISSANCE LEARNING INC	Yes			<input type="checkbox"/>
3 0000018545	Supplier	Approved	0001	TRACIE MANN	RENAISSANCE LEARNING INC	Yes			<input type="checkbox"/>
4 0000018545	Supplier	Approved	0001	SHELLEY TESNOW	RENAISSANCE LEARNING INC	Yes			<input type="checkbox"/>
5 0000018545	Supplier	Approved	0001	SALLY SMITH	RENAISSANCE LEARNING INC	Yes			<input type="checkbox"/>
6 0000018545	Supplier	Approved	0001	Bid Notification	RENAISSANCE LEARNING INC	Yes			<input type="checkbox"/>
7 0000018545	Supplier	Approved	0001	JAIME RICKABY	RENAISSANCE LEARNING INC	Yes			<input type="checkbox"/>

Invite: Use this checkbox to invite suppliers to this Event. Optionally, use the Select All and/or Deselect All hyperlinks to invite bidders.

The Category and Diversity icons can be used to view additional information.

Once the desired Suppliers have been selected to invite, **select the Return to Invite Bidders button.**

Create an Event

Invite Bidders

Business Unit 09000 Event ID EV00000533 Round 1 Version 1 Event Format Buy Event Type RFX

Diversity Information

Public Event

Bidder Invitation List

1-2 of 2 | View All

Bidder ID	Bidder Type	Status	Location	Bidder Company	Category	Diversity	*Dispatch Method	
PUBLIC_AUC	Public		1	This is a Public Event			Email	
0000014268	Supplier	Approved	0006	SHI INTERNATIONAL CORP			Email	

Search for Bidders Save Bidders as Group

Save Event Changes Upload Contacts from file Go To [] Go

The bidders selected to invite will be added to the Bidder Invitation List, shown above.

Dispatch Method: Options are Email, Fax, and Print. For the suppliers you want to receive automatic email notification, set this field to Email. This field should default to email but should be confirmed on this page.

Select the Bidder Details icon, to the right of the Dispatch Method field, to view the Bidder Contact information including the Email address that will receive automatic Event Notification.

x
Help

Setid	00000	Bidder ID	0000014268
Bidder Type	Supplier	Location	0006

Bidder Contact Info

| << < 1 of 1 > >> | [View All](#)

*Contact Seq Num	<input type="text" value="1"/>	+	-
Name	ALEX BALLESTEROS		
Email	noreply@omes.ok.gov		
*Address	<input type="text" value="21"/>		
Address 1	290 DAVIDSON AVENUE		
Address 2			
Address 3			
City	SOMERSET	County	
State	NJ	Postal	08873
		Country	USA

<input type="button" value="OK"/>	<input type="button" value="Cancel"/>	<input type="button" value="Refresh"/>
-----------------------------------	---------------------------------------	--

If necessary, change the **Contact Sequence Number** to the desired contact that contains the email address that you want automatic Event Notifications sent to.

Additional Contacts can be added by selecting the **plus** icon and entering Bidder contact information.

Select the **OK** button to return to the Invite Bidders page.

Bidder Invitation List

| << < 1-2 of 2 > >> | [View All](#)

Bidder ID	Bidder Type	Status	Location	Bidder Company	Category	Diversity	*Dispatch Method
PUBLIC_AUC	Public		1	This is a Public Event			Email
0000014268	Supplier	Approved	0006	SHI INTERNATIONAL CORP			Email

Search for Bidders
Save Bidders as Group

GoTo

[< Return to Event Overview](#)

Once all Bidders (Suppliers) have been invited to the Event and the Contact information (email addresses) is complete, **select the Save Event Changes** button then **select the Return to Event Overview** link to return to the Event Summary page.

An example of the Document Status Inquiry page after vouchers have been added and payments are listed is shown below:

Sourcing Document Status Inquiry

Business Unit: 34500 | Event ID: EV00000019 | Round: 1 | Version: 1 | Created By: Gai Hunter (580)
 Event Status: Awarded | Start Date: 05/20/10 12:31PM CDT | Event Amount: 5000.01000 | Currency: USD

[Requisitions\(1\)](#) | [Sourcing Events](#) | [Procurement Contracts](#) | [Purchase Orders\(1\)](#) | [Service Work Orders](#) | [Receipts](#) | [Returns](#) | [Vouchers\(1\)](#) | [Payments\(1\)](#)

[Show All](#)

Associated Document

Documents | Related Info | All

Actions	SetID	Business Unit	Document Type	Document ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions	46700		Payment	105282738	Posted	08/10/2010	0000202457	0002	🔗
▼ Actions		34500	Purchase Order	3459028451	Compl	06/17/2010	0000202457	0002	🔗
▼ Actions		34500	Requisition	3450021680	Complete	05/04/2010			🔗
▼ Actions		34500	Voucher	00328012	Posted	06/17/2010	0000202457	0002	🔗

[Return to Search](#)

The links outlined at the top of the page can be selected to view the associated document. Alternatively, the Document ID hyperlink can be selected in the Documents tab of the page.

Step 4: Post the Event

Step 5: Post Event

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

Event Collaborators are not currently used, therefore, posting occurs following Bidder Invitations.

When all Event information is complete and reviewed for accuracy, **select** the **Save Event** button to save your work.

If the Event is ready to Post, **select** the **Post** button. If not, posting can be done at a later time.

NOTE: If any bidder/supplier changes or communications need to happen before the email notifications go out – set up Supplier User ID's, change Contact Email address, etc. – do those before you Post the Event. Once you hit the **Post** button, all automatic email invitations will be sent to the Supplier Contact email addresses defined in the system at that time.

This will submit the Event for Approval. (18058,207)

Once the event is approved and posted you will be limited to the changes that you can make to the event. Click OK to continue or Cancel if you are not done making changes to the event.

When the Post button is clicked, a warning message indicating the Event will be posted is displayed. **Select** the **OK** button to post the Event.

Event Approval Inquiry

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

Related Links:

[Document Status Inquiry](#)
[View All Attachments for Event Plan Task Associations](#)

[Event Approval Inquiry](#)

After selecting the **Post** button, the **Event Approval Inquiry** link will display. **Select** the link to view the Approval Workflow in a new tab.

Approval Status

Business Unit 09000 Event ID: EV00000533 Round 1 Version 1 Format Buy

Event Type	RFx	Start Date	09/23/2024 10:49AM CDT
Event Status	Pending Post Approval	End Date	10/14/2024 10:49AM CDT
Event Name	TST_EVENT_01	Entered By	BBENN06
Description	Testing Event		

▼ **Review/Edit Approvers**

Sourcing Approval

Approval Status: Pending

Sourcing Approval

Pending

[Return to Event Workbench](#)

Select the **Multiple Approvers** link to view the users in the workflow path.

Use the **Start New Path** button to insert an Ad Hoc approval level.

NOTE: If any supplier changes or communications need to happen before the email notifications go out – set up Supplier User ID's, change Contact Email address, etc. – do those before the event is approved. **Once the event is approved, all automatic email invitations will be sent to the Supplier Contact email addresses defined in the system at that time. You should also receive a notification if you entered your email information in the Public event tab.**

Creating a Buy Event Without a Requisition

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

Create Events

Add a New Value Q Find an Existing Value

*Business Unit

*Event ID

Event Round 1

Event Version 1

*Event Format

*Event Type

Proxy Bidding (Auctions Only)

Business Unit: Required field. Populate with the Agency Business Unit in which the Event is being created.

Event ID: Leave value as NEXT.

Event Format: Options are **Buy, RFI, and Sell**. **Select** the Buy option to create a Buy Event.

Event Type: RFX should be selected when the Buy format is selected.

Select the Add button to enter the Event Details page.

NOTE: Creating an event without copying from a Req, Purchase Order, or Contract would be rare and require special permission.

Define Event Summary

Create an Event

Event Summary

Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format Buy

Event Type RFX Change to Auction

Event Status Open

*Event Name

Description

Time Zone CDT

Preview Date Time

Start Date Time

Q & A End Date Time

End Date Time

Copy From

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Event Name: Required field should hold the general Name of the Event.

Description: Not required, but highly recommended. Enter the purpose of the solicitation in this field.

Preview Date: Defaults to current date. Define the event Preview Date.

Start Date: Defaults to current date. Define the event Start Date.

Q & A End Date: Defaults to 21 days after start date. Define when the bidders' and suppliers' Q&A period closes. The Q & A End Date is normally 14 – 21 days after the bid Start Date depending on the complexity of the event.

End Date: Defaults to 21 days after start date. Define the event End date. The End Date should be between 30-45 days depending on the complexity of the event.

Select the **Save Event Changes** button.

Note the **EventID** field will change from "NEXT" and will be assigned an Event ID by the system.

Step 1: Define Event Basics

Complete Step 1, shown on pages 19-28, to define event basic information.

Step 2: Configure Line Items

Step 2: Configure Line Items

Create line listings for this event.

* Line Items

Item Line Defaults

Select the **Line Items** link.

Create an Event

Line Items

Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type RFx
Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From Go Filtered View All Lines and Groups

Line Items

Basic Definition Advanced Definition

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00000

Event Total: 0.0000 USD Line Weighting Total: 0% Remaining Weight: 100%

Group Selected Lines OK

< Return to Event Overview GoTo Go

When creating an event from scratch, line item information will need to be inputted directly.

Enter Line Information if known or use the lookup icon in the Item ID field to search for items. Selecting an Item ID from the lookup icon will default most of the remaining fields.

Item ID: Select the item from the item master. The description of the Item ID displays by default. If an Item ID is not selected, a Category code should be selected.

Category: Displays by default the category from the specified item or asset. If adding an item by description rather than Item ID, select a category. Any bid factors that you assign to the specified category are added to the line bid factors.

UOM: Select a Unit of Measure.

Qty: Input a quantity value.

Start Price: Enter the amount at which the bidding must start if **Display and Must Beat Start Price** is selected. If an item is selected, the system uses the item's standard unit price as a default.

Create an Event

Line Items

Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type RFx
 Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From Filtered View

Line Items ⓘ

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1	1000000004	INK CART: BRO Item # LC31C-BRT, Cyan Ink Cartridge for Brother PPE 1920C Multifunction Machine	44103105	EA	1	13.0000		0.00000

Event Total: 0.0000 USD Line Weighting Total: 0% Remaining Weight: 100%

Add multiple line items as needed by selecting the **plus (+)** button at the end of the line.

Weighting: Enter a value to indicate the importance of the line item to the entire event. If you do not enter line weightings, each line item is weighted equally.

Select the **Advanced Definition** Tab.

Advanced Definition

Create an Event

Line Items

Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From Filtered View

Line Items ²

Basic Definition **Advanced Definition**

Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints			
<input type="checkbox"/> 1	<input type="text" value="1000000004"/>	INK CART-BRO Item # LC31C-BRT, Cyan ink cartridge for Brother PPF 1920C Multifunction Machine	<input type="text" value="1"/>	00000		Details	Bid Factors	No	<input type="button" value="Comment"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Event Total: 13.0000 USD Line Weighting Total: 0 % Remaining Weight: 100%

Group Selected Lines

Use the **Advanced Definition Tab** to add additional Bid Factors to the Event Lines or to add line comments or file attachments.

Select the Details link to view the details for the line.

Create an Event

Line Details

Go To Line 1 - 1000000004 INK CART.BRO Item # LC31C-BR

Event ID NEXT
Line 1
Item ID 1000000004
Description INK CART.BRO Item # LC31C-BRT, Cyan Ink cartridge for Brother PPF 1920C Multifunction Machine
 Item Biddable Only if Grouped

Requested Quantity 1.0000
Start Price 13.0000
Physical Nature Goods

Shipping Information

Schedule 1
Quantity 1.0000
Ship Via COMMON

Due Date 10/16/2024
Ship To 09003
Freight Terms
Ship From

Bid Parameters

Bid Required
Reserve Price
Bid Quantity Rule Requested Quantity Required
Alternate UOM Not Allowed

Min Quantity 0.0000
Max Quantity 1.0000

Item Specification
Line Image

[Return to Event Lines Page](#)

The Line Details are displayed. Complete the Shipping Information for the line item.

Due Date: Select a due date for shipment.

Freight Terms: Select the freight terms to associate with this event.

Ship via, Ship to and Ship From: Enter values for these fields. Ship Via and Ship From are optional.

Bid Quantity Rule:

- *Allow Extra Quantity to be Bid:* Select to allow bidders to place bids for quantities beyond the requested event quantity up to the maximum bid quantity.
- *Bid Up to Maximum Quantity:* Select to allow bidders to place bids up to a maximum quantity for the line.
- *Quantity Not Applicable:* Select for non-item lines, such as extended warranties. Bidders must enter a bid price but not a bid quantity. If you copied from an amount-only *requisition*, this will be the default value for this field and you cannot change it.
- *Requested Quantity Required:* Select to indicate that bidders must place bids for the requested quantity only.

Alternate UOM: Select a value to indicate whether bidders can place bids using alternate units of measure.

After reviewing the line details as necessary, **select** the **Return to Event Lines Page** link.

From the **Advanced Definition** page, page 42, select the **Bid Factors** link.

Create an Event
Line Bid Factors

Go To Line: 1 - 1000000004 INK CART.BRO Item # LC31C-BRT, Cya

Line: 1
 Item ID: 1000000004
 Description: INK CART.BRO Item # LC31C-BRT, Cyan Ink cartridge for Brother PPF 1920C Multifunction Machine

Bid Factor Weighting Total: 100.00000
 Remaining Bid Factor Weight: 0.00000

Bid Factors ?

Seq Nbr	Bid Factor	Question	Type	Weighting
1	PRICE	What price are bidding?	Monetary	100.00000

Best: 0.000000 Worst: 13.000000

Select for deletion

Add Bid Factors by Group Select Bid Factors Delete Selected Rows

Bid Factor Weighting Total: 100.00000
 Remaining Bid Factor Weight: 0.00000

[< Return to Event Lines Page](#)

Use the **plus (+)** button to create Line Bid Factors.

Bid Factor: Choose from a list of predefined Bid Factor templates. When adding new Bid Factors, **select** the lookup icon to the right of the bid factor field, and select an option. This will default the remaining fields.

Weighting: Enter a value to indicate the importance of the bid factor to the line item. The system then factors weightings into the score. User must enter weightings for bid factors if you want the bid factor responses to be scored.

NOTE: These Bid Factors apply to the line only, not the whole event.

After reviewing the Bid Factor information, **select** the **Return to Event Lines Page** link.

From the **Advanced Definition** page, page 42, select the comments icon on the right side of the line.

Sourcing Line Comments

Create an Event Help

Line Comments and Attachments

Event ID NEXT Line Number 2

Enter Comments ? 1 of 1 View All

Comments: + -

Send To Bidder Include On Award [Fetch Item Specs](#) [Standard Comments](#)

[Add Attachment](#)

Attachments ? 1-1 of 1

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
COR251.doc		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View -

[OK](#) [Cancel](#) [Refresh](#)

Use the Line Comments and Attachments page to insert additional line comments or add file attachments to the Event Lines. This page can be used to add your working solicitation documents if desired. If used, make sure to uncheck all the boxes as you do not want these documents sent to the bidders. This is NOT where you will post your bid documents.

Select the plus (+) button to insert more than one comment.

Select the Add Attachment button to insert attachments up to 35MB in document size.

Select the Choose Files button, then select a file to insert.

Select the Upload button to attach the selected file.

NOTE: The View button will open a new window to display the attachment.

Select the OK button to return to the Event Lines page after all comments and file attachments are added.

Modify an Event

Line Items

Business Unit 09000 Event ID EV00000534 Round 1 Version 1 Event Format Buy Event Type RFX
 Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From Filtered View

Line Items ⓘ

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting		
<input type="checkbox"/> 1	<input type="text" value="1000000004"/>	INK CART-BRO Item # LC31C-BRT, Cyan Ink Cartridge for Brother PPF 1920C Multifunction Machine	44103105	EA <input type="text" value="EA"/>	<input type="text" value="1.0000"/>	<input type="text" value="13.0000"/>	\$13.00	<input type="text" value="0.00000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Event Total: 13.0000 USD Line Weighting Total: 0% Remaining Weight: 100%

Group Selected Lines

[< Return to Event Overview](#) Go To

After inputting line item information and reviewing the advanced definition tab, **select the Save Event Changes** button.

Select the Return to Event Overview link.

NOTE: To view the default Bid Factors after saving the Line Information, select **Event Bid Factors** from the Event Summary page, under Step 1.

Event Summary

Business Unit 09000 Event ID EV00000534 Round 1 Version 1 Event Format Buy

Event Type	RFx	Change to Auction	Time Zone	CDT
Event Status	Open		Preview Date	09/24/2024 <input type="text"/> Time 3:33PM
*Event Name	TST_EVENT_2		Start Date	09/24/2024 <input type="text"/> Time 3:33PM
Description	Testing Event 2		Q & A End Date	10/15/2024 <input type="text"/> Time 3:33PM
			End Date	10/15/2024 <input type="text"/> Time 3:33PM
			Copy From	<input type="text"/> <input type="button" value="Go"/>

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics

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

* Event Settings and Options
 Event Comments and Attachments
 Event Header Bid Factors

Payment Terms and Contact Info
 Event Constraints

[Event Reminder Notification](#)

Step 2: Configure Line Items

Create line listings for this event.

* Line Items

[Item Line Defaults](#)

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

* Bidder Invitations

Step 4: Invite Collaborators

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

[Event Collaborators](#)

Step 5: Post Event

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

Related Links:

[Document Status Inquiry](#)

[View All Attachments for Event](#)
[Plan Task Associations](#)

Last Updated By: Bosten Benn 09/24/2024 04:15 PM PDT



Step 3: Select Bidders to Invite

Complete Step 3, shown on pages 30-35.

Step 4: Post the Event

After reviewing the Event information, post the Event, shown on page 36.



Creating an RFI Event

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

Create Events

Find an Existing Value
Add a New Value

*Business Unit

*Event ID

Event Round

Event Version

*Event Format

*Event Type

Proxy Bidding (Auctions Only)

Add

Business Unit: Required field. Populate with the Agency Business Unit in which the Event is being created.

Event ID: Leave value as NEXT.

Event Format: Options are **Buy**, **Sell**, and **RFI**. **Select** the **RFI** option to create an RFI Event.

Event Type: RFx will be automatically selected when RFI is chosen as the Event Format and cannot be changed.

Select the **Add** button to enter the Event Details page.

Define Event Summary

Event Summary

Business Unit 09000 Event ID EV00000855 Round 1 Version 1 Event Format Buy

Event Type RFX	Time Zone CST
Event Status Posted	Preview Date 01/29/2026 Time 10:54AM
Event Name SW0093M PESTICIDE DISPOSAL	Start Date 01/29/2026 Time 10:54AM
Description The Office of Management and Enterprise Services (OMES) Central Purchasing division is seeking responses from potential suppliers to provide a contract for unwanted pesticide chemical disposal	Q & A End Date 02/18/2026 Time 3:00PM
	Copy From <input type="text"/>

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

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

<ul style="list-style-type: none"> * Event Settings and Options Event Comments and Attachments Event Header Bid Factors 	<ul style="list-style-type: none"> Payment Terms and Contact Info Event Constraints Event Reminder Notification
--	--

Time 3:00PM End Date 03/04/2026

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

* Line Items	Item Line Defaults
--------------	--------------------

Step 3: Select Bidders to Invite

Event Name: Required field should hold the general Name of the Event.

Description: Not required, but highly recommended. Enter the purpose of the solicitation in this field.

Preview Date: Defaults to current date. Define the event Preview Date.

Start Date: Defaults to current date. Define the event Start Date.

Q & A End Date: Defaults to 21 days after start date. Define when the bidders' and suppliers' Q&A period closes. The Q & A End Date is normally 14 – 21 days after the bid Start Date depending on the complexity of the event.

End Date: Defaults to 21 days after start date. Define the event End date. The End Date should be between 30-45 days depending on the complexity of the event.

Select the **Save Event Changes** button.

Note the **EventID** field will change from "NEXT" and will be assigned an Event ID by the system.

Step 1: Define Event Basics

Event Settings and Options

Step 1: Define Event Basics

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

* [Event Settings and Options](#)
[Event Comments and Attachments](#)

[Payment Terms and Contact Info](#)

[Event Reminder Notification](#)

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

Create an Event

Event Settings and Options

Business Unit 09000 Event ID NEXT Round 1 Version 1 Event Format RFI

Create PDF on Event Post

Allow Bidder XML Downloads

Bid Required On All Lines

Multiple Bids Allowed

Allow Edit of Posted Bids

Do Not Use Best Bids on New Rounds

Display Bid Factor Ideal Value

Allow Send NOIA Notification

Round/Version Display

Score RFI

Display Bid Factor Weightings

Display Bid Factor Best/Worst

Notification to be Sent

Allow Send NOA Notification

Notification To be Sent

*NOIA Report Template

Award Only after Notice End

*Award Template

*Non-Award Template

▼ **Minimum Response and Warning**

Minimum number of bid response

Number of days warning prior

▶ **Associated Categories** ?

[Save Event Changes](#)

GoTo [Go](#)

[< Return to Event Overview](#)

The Event Settings and Options page allows the user to define details for the entire Event. Most of the fields will default in and generally should not be changed unless known to the user.

- Round/Version Display: Select one of these options:
- *Display Round*
- *Display Round and Version*
- *Do not Display*

If applicable, select a **NOIA Report Template**, **Award Template** and **Non-Award Template**.

Score RFI Event: **Select** to calculate a score for RFI responses. If this option is deselected, the system hides the Best, Worst, Ideal and Weighting fields on the Bid Response page.

Display Bid Factor Best/Worst and Display Bid Factor Ideal Value: **Select** to show the best and worst values for the bid factor or the ideal value for the bid factor on the Create Bid Response page. If you deselect these options, then bidders will not be able to see the best and worst values or the ideal value for a bid factor on the Create Bid Response page.

Create PDF on Event Post: **Select** to create a PDF version of the sourcing event. If this option is not selected, PDF creation is suppressed.

Allow Bidder XML Downloads: **Select** to enable bidders to download events to an XML file. If this option is not selected, a PDF version of the sourcing event is created; however, an XML version is not created when the events are posted.

Bid Required On All Lines: **Select** this check box if you require bidders to bid on all lines on the event.

Multiple Bids Allowed: Indicates whether bidders (for RFX events) can post multiple bids on the same event.

Allow Edit of Posted Bids: Indicates whether bidders (for RFX events) can edit their posted bids until the event ends.

Do Not Use Best Bids on New Rounds: This setting defaults from the Sourcing Business Unit Definition page based on the business unit. However, you can change the setting at the event level here. **Select** to indicate that new rounds should not be created using best bids when the bids are countered. If you select this option, then bidders will not be able to accept the counteroffer on the Create Bid Response page; bidders will be forced to rebid. In this scenario, bidders will still be able to either counter or withdraw the bid.

Display Bid Factor Ideal Value: **Select** to show the best and worst values for the bid factor or the ideal value for the bid factor on the Create Bid Response page. If you deselect these options, then bidders will not be able to see the best and worst values or the ideal value for a bid factor on the Create Bid Response page.

Allow Send NOIA Notification: **Select** to send a communication to the bidders that they have been identified for awarding a PO or contract

Generally, the **Create PDF on Event Post** box is unchecked and the **Bid Required on All Lines** box is checked.

Minimum Number of Bid Responses: Enter a number if a minimum number of bids is required. If the number of bidders' responses is less than the value specified in this field, then an alert will be displayed on the Procurement Operations Home Fluid pages under the My Sourcing Events tile and on the Navigation bar. If this field is left blank, no Alerts will be displayed for this event.

Select the arrow to the left of the Associated Categories heading to expand the section.

▼ Associated Categories ?

⌵ 🔍 1-1 of 1 ⏪ ⏩

Category ID	Category	Description		
	<input type="text"/>		+	-

Input the Category Codes to be associated with the event.

After reviewing the Event Settings and Options, **select** the **Return to Event Overview** link.

Event Comments and Attachments

Follow the same steps as a Buy event to add Event Comments and Attachments, shown on pages 22 and 23.

Payment Terms and Contact Info

Step 1: Define Event Basics

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

* [Event Settings and Options](#)
[Event Comments and Attachments](#)

[Payment Terms and Contact Info](#)

[Event Reminder Notification](#)

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

Create an Event

Event Contact Details

Event Contact ?

Contact Name

Email ID

Phone

[< Return to Event Overview](#)

Contact Name: This is generally the Requestor's name.

Email ID: This should hold the Email of the Event Creator. System generated emails will be sent to the address including undelivered emails to invited bidders. This email will be visible to bidders when responding electronically and allow them to send emails directly to this email address with questions, etc.

Phone: Generally, the requestor phone number. This will print at the top of the paper bid document and be visible at the top of the page when suppliers are bidding electronically.

Ensure the Contact Name, Buyer Email ID and Phone fields are correct.

Select the **Save Event Changes** button.

Select the **Return to Event Overview** link to return to the main Event Summary page.

Event Reminder Notification

Follow the same steps as a Buy event to add Event Reminder Notifications, shown on page 28.

Step 2: Configure Event Bid Factors

Step 2: Configure Event Bid Factors

Create line listings for this event.

* [Event Bid Factors](#)

Select the [Event Bid Factors](#) link.

Create an Event

Event Bid Factors

Event ID	NEXT	Bid Factor Weighting Total	0.00000
Event Name	TST_RFL_EVENT	Remaining Bid Factor Weight	100.00000

Bid Factors ?

Seq Nbr	1	*Type		Weighting	0.00000	<input type="button" value="+"/>	<input type="button" value="-"/>
*Bid Factor	ADHOC	<input checked="" type="checkbox"/> Display Bid Factor?		<input checked="" type="checkbox"/> Bid Factor Response Required			
Question		<input type="checkbox"/> Ideal Response Required					
Best	0.000000	UOM					
Worst	0.000000						

[Comments and Attachments](#)

Select for deletion

[Add Bid Factors by Group](#) [Select Bid Factors](#)

Bid Factor Weighting Total	0.00000
Remaining Bid Factor Weight	100.00000

[< Return to Event Overview](#)

Use the Event Bid Factors page to specify header-level bid factors that relate to the entire event.

If a specific Bid Factor question needs to be added, **select** the **plus** (+) button to insert a new question below that sequence. For example, if the plus button is clicked in the first sequence, a new question will be added as the second sequence. **Select** the **minus** (-) button to delete a question.

Bid Factor: Choose from a list of predefined Bid Factor templates. When adding new Bid Factors, **select** the lookup icon to the right of the bid factor field and select an option. This will default in the remaining fields. Bid Factors can also be searched for by clicking the **Select Bid Factors** link.

Weighting: Enter a value to indicate the importance of the bid factor to the line item. The system then factors weightings into the score.

You must enter weightings for bid factors if you want the bid factor responses to be scored.

Display Bid Factor: Select to display the bid factor to the bidder. If this option is not selected, the bid factor is hidden from the bidder and you can enter a response in the bid analysis pages.

Bid Factor Response Required: Select if the bidder must enter a response for the specified bid factor before successfully posting a bid.

Ideal Response Required: Select if the bidder's response must match the specified best or ideal response for the bid to be eligible for award. Bidders who do not match the specified best or ideal response can still post their bids, but their bids will be disqualified and will not be eligible for award.

Add Bid Factors by Group: Select this link to search for Bid Factor groups to be included.

Search Bid Factor Groups

Search Criteria

Bid Factor Group Code

Business Unit

Dept

Search Results

Bid Factor Group Code	Description	Select
1 HEADER_QUESTIONS	Header Response Questions	<input type="checkbox"/>

Enter the Business Unit for the Event and **select** the **Search** button to retrieve Bid Factor Groups associated with that Business Unit.

Choose the **Select** checkbox, then the **OK** button to include the Bid Factor Group on the event.

Step 3: Select Bidders to Invite

Follow the same steps as a Buy event to Invite Bidders, shown in Step 3, pages 30-33.

Step 4: Post Event

Follow the same steps as a Buy event to Post the Event, shown in Step 4, page 36.

Event Approval Inquiry

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

Related Links:

[Document Status Inquiry](#)
[View All Attachments for Event Plan Task Associations](#)
[Event Approval Inquiry](#)

After selecting the post button, the **Event Approval Inquiry** link will display. **Select** the link to view the Approval Workflow in a new tab.

Approval Status

Business Unit 09000 Event ID: [EV00000535](#) Round 1 Version 1 Format RFI

Event Type	RFx	Start Date	09/25/2024 10:37AM CDT
Event Status	Pending Post Approval	End Date	10/16/2024 10:37AM CDT
Event Name	TST_RFI_EVENT	Entered By	BBENN06
Description	RFI Testing Event		

▼ **Review/Edit Approvers**

Sourcing Approval

Approval Status: Pending [+ Start New Path](#)

Sourcing Approval

Pending [+ Multiple Approvers](#)
 Branch Manager [+](#)

Select the **Multiple Approvers** link to view the users in the workflow path.

Use the **Start New Path** link to insert an Ad Hoc approval level.

Review/Edit Event

Creating New Versions (Amendments)

Navigation > Menu > Sourcing > Maintain Events > Event Workbench

Create new Versions for Events when you need to make changes to a posted event. Once a new version is created, you can't delete lines or bid factors because bids to the previous version would include those lines and bid factors.

You can create and edit Versions of multi-version events. When viewing a multi-version event in the Event Workbench component, the system displays the most recent version of the event. The new version of the event must be Posted to be available for bidding.

When a new Version of an Event is created:

- The system will create a new Version of the event.
- The system Increments the Version number by one.
- The previous current Version of the event becomes read-only upon posting the new version, and additional changes to that version cannot be made.
- The user cannot add or delete line items, change bid factors or change the start price or line quantity for a new version.

If any scoring-related changes are required, you must create a new round.

Event Workbench

Search Criteria

Business Unit

Event ID From Start Date To Start Date Sort With

Created By From End Date To End Date Sort Order

Event Format Category

Event Type Item ID

Event Status Description

Associated With Plan Plan Name

Only show Events I created

Only show Active Events

Use my search defaults

Default Search Preferences

Search Results 1-25 of 135 | View 100

Event ID	Name	Format	Type	Unit	Status						
EV00000535	TST_RFI_EVENT	RFI	RFx	09000	Pending Post Approval						
▶ EV00000534	TST_EVENT_2	Buy	RFx	09000	Open						
▶ EV00000533	TST_EVENT_01	Buy	RFx	09000	Pending Post Approval						
▶ EV00000532	IronClad Testing	Buy	RFx	83000	10/14/2024 07:15 AM CDT						
▶ EV00000518	SW0685 Flashing LE...	Buy	RFx	09000	09/27/2024 03:00 PM CDT						
▶ EV00000456	Maternal Child & H...	Buy	RFx	34000	Event Completed						
▶ EV00000531	Test	Buy	RFx	04000	Event Completed						

Select the **Create New Version** icon, outlined above, from the Workbench.

Create New Version? (18058,8129)

This operation will create a new version of the event. The current active version will not be inactivated until the new version has been posted. Select 'Yes' if you wish to create a new version for this event. Otherwise, select 'No'.

Yes

No

The user will receive the message shown above, **select** the **Yes** button to continue with creating a new version.

Modify an Event

Event Summary

Business Unit 09000 Event ID EV00000533 Round 1 Version 1 Event Format Buy

Event Type	RFx	Time Zone	CDT	Preview Date	09/23/2024	Time	10:49AM
Event Status	Pending Post Approval	Start Date	09/23/2024	Time	10:49AM	Q & A End Date	10/14/2024
Event Name	TST_EVENT_01	End Date	10/14/2024	Time	10:49AM	Time	10:49AM
Description	Testing Event	Copy From					

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

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

- * Event Settings and Options
- Event Comments and Attachments
- Event Header Bid Factors
- Payment Terms and Contact Info
- Event Constraints
- Event Reminder Notification

The **New Version of the Event** will use the same Event ID number but increase the Version count.

Event ID: This is same as the previous version.

Round: For Version changes only, the number remains the same.

Version: The Version number will be incremented by one for the new version.

Description: For new Versions, the buyer may want to indicate in this field the reason for the Amendment. This field is visible at the top of the bidder email and Event Package.

End Date: To extend the Event End Date to accommodate amendment requirements, change this field as would be done with a new Event.

Under **Step 1: Define Event Basics**, select **Event Comments and Attachments**.

Modify an Event

Event Comments and Attachments

Event ID EV00000533

Enter Comments ⓘ

1 of 2 | View All

Comments:

Lease Premium Latitude 7440 (Ultralight) | Payment \$39.37 for 36 Months | Quote: 3000172482359.1

RITM0334008

This is NOT AN ASSET
All invoices shall be submitted to OMES Accounts Payable, AccountsPayable@omes.ok.gov, and invoice shall reference the Purchase order. It is strongly recommended that invoices shall be submitted within ninety (90) days of services/products performed/delivered for prompt payment.
Interest on late payments made by the State of Oklahoma is governed by 62 O.S. §34-71 and 62 O.S. §34-72

Send To Bidder Include On Award

Standard Comments

Add Attachment

OK Cancel Refresh

Select the **Add Attachment** button.

Select File to create as Attachment

You may attach up to 99 files to upload

Choose Files No file chosen

Upload Cancel

Select the **Choose Files** button and select a file to add as an attachment.

Select the **Upload** button to attach the file.

Attachments ⓘ

1-1 of 1

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
COR134_Original.pdf		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View

OK Cancel Refresh

Display to Bidder/Include On Award/Include in Notifications: These boxes should generally be checked for an Amendment to alert the Bidders and allow them to view the new attachment.

Select the **OK** button to return to the Event Summary page after all amendment file attachments are added.

Step 5: Post Event

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

Save, Edit or Post the Event as would be done with a first time Event.

Select the **Save Event** button, the dialogue box below will display.

Do you want to recreate the Event Files? (18058,1003)

If you hit "Yes", the current Event Files attachments will be removed and replaced with new files containing the latest changes to the event. An email will also be sent to the Bidders with the latest attachments.

If you hit "No", the current Event Files will not be updated.

The system will ask if you want to send to all bidders again. **Select** Yes and all will be notified

NOTE: The event does not have to be reposted; the system will not provide this option. All suppliers will be notified of the amendment and the amendment document will be attached to the email.

NOTE: The new Versions will have the same invited bidders as the previous version. If those bidders have submitted a bid previously, they will need to "Confirm" that their previous bid is ok for the new version. An email will indicate this requirement to the bidder.

NOTE: New Versions should be used to make the following changes:

Additional information that needs to be communicated to bidders (questions, etc.).

Any Event Line changes such as Item or Quantity.

Event Name

Extension of Event End Date/Time

Payment, Currency, and Buyer Information

Creating New Rounds (Counters)

Create new Rounds for RFX events to negotiate with bidders after initial bids are received. This is useful when either substantive changes to the event (requiring additional input from the bidders) are made or when you evaluate and narrow bids to a select group for further negotiation.

You can select to counter one or more bidders for the overall event or for individual lines. The system creates the new Round by copying the previous Round/Version. Countered bidders are the only invited bidders for the new round. Only countered lines are included in the new round. You can add additional bidders if necessary.

The new round is posted out to the invited bidders. The bidders receive a new invitation along with a new counter PDF version of the event. When a bidder bids on the new round, the bidder can view his or her initial bid and the countered offer.

Navigation > Sourcing > Maintain Events > Event Workbench

Event Workbench

Search Criteria

Business Unit

Event ID From Start Date To Start Date

Created By From End Date To End Date

Event Format Category

Event Type Item ID

Event Status Description

Associated With Plan Name

Sort With

Sort Order

Only show Events I created

Only show Active Events

Use my search defaults

[Default Search Preferences](#)

Legend

Search Results | | [View All](#)

Event ID	Name	Format	Type	Unit	Status
EV00000499	SW0193-Sewer Clean...	Buy	RFX	09000	Event Completed

Select the **Analyze Bids** icon from the Workbench. The Analyze Bids page allows the user to counter the bids to create a new Round.

Analyze Total

Analyze Total [Analyze Line](#)

Business Unit: 09000 Event ID: EV0000499 Round: 1 Version: 2 Event Name: SW0193-Sewer Cleaning and Inspection Equipment

Event Format: Buy Event Type: RFX Currency: USD End Date: 08/23/2024 3:00PM CDT Status: Posted **Go To:**

[Bid Analysis and Display Options](#) ?

Analysis

	KEY EQUIPMENT & SUPPLY CO	ESSENTIAL EQUIPMENT	VERMEER GREAT PLAINS INC	CENTRAL OKLAHOMA WINNELSON CO	ICM OF AMERICA INC
Event Version Responded To	2	2	1	2	2
Bid Number	1	3	1	1	1
Total Bid Amount	1.00	1.00	1.00	1.00	100,000.00
Total Bid Cost	0.00	0.00	1.00	0.00	0.00
Total Event Score	100.00	100.00	100.00	100.00	99.90
Total Header Cost	0.00	0.00	0.00	0.00	0.00
Total Header Score	75.00	75.00	75.00	75.00	75.00

Bid Action: Counter NA NA NA NA

Reject Reason:

Award by Percent:

Hide Bid:

Factors

Recalculate Add / Edit Factors Unhide Bids << < > >>

Save Return to Search

Bid Action: Select the bid action of 'Counter' to counter a particular bidder.

NOTE: If you want to counter all lines on an Event, you select the Counter action on the Analyze Total page (displayed) for the selected bidders. If you want to counter only selected lines from the event, select the Counter action on the Analyze Lines page for the selected lines and bidders.

Go To: select Create New Round from the Go-To dropdown menu.

NOTE: All the details from the previous Round are copied into the new Round.

Modify an Event

Event Summary

Business Unit 09000 Event ID EV00000499 **Round 2** Version 1 Event Format Buy

Event Type RFx [Change to Auction](#)

Event Status Open

*Event Name SW0193-Sewer Cleaning and Inspection Equipment

Description Purchase Sewer Cleaning and Inspection Equipment to all Oklahoma state agencies and interlocal entities

Time Zone CDT

Preview Date 10/01/2024 Time 11:46AM

Start Date 10/01/2024 Time 11:46AM

Q & A End Date 10/22/2024 Time 11:46AM

End Date 10/22/2024 Time 11:46AM

Copy From

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

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

[* Event Settings and Options](#) [Payment Terms and Contact Info](#)
[Event Comments and Attachments](#) [Event Constraints](#)
[Event Header Bid Factors](#) [Event Reminder Notification](#)

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

[* Line Items](#) [Item Line Defaults](#)

The new Event Round will be displayed.

Event ID: The new Round will have the same Event ID as the previous.

Round: The Round number will be increased by 1.

Version: This new round will have Version number 1 initially.

NOTE: New Rounds can have subsequent Versions in which case the Version number can also increase from the original Version 1.

NOTE: Normal Bidder Invitation, Bids, and related actions can be taken on the new Round.

Review / Track Event

The **Event Workbench** is an area that buyers can use to manage Events through their lifecycle. The Event Workbench can be used to access Event Details, view Event Lines, create new Versions, Cancel an Event or research History of an Event.

From the Event Workbench the user can navigate to other pages to Analyze Events, Edit Events or see Bid Response history.

Navigation > Menu > Sourcing > Maintain Events > Event Workbench

Event Workbench

Search Criteria

Business Unit

Event ID From Start Date To Start Date Sort With

Created By From End Date To End Date Sort Order

Event Format Category

Event Type Item ID

Event Status Description

Associated With Plan Plan Name

Only show Events I created

Only show Active Events

Use my search defaults

Default Search Preferences

Legend

Search Results | 1-25 of 136 |

Event ID	Name	Format	Type	Unit	Status					
EV00000535	TST_RFI_EVENT	RFI	RFx	09000	Pending Post Approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ EV00000534	TST_EVENT_2	Buy	RFx	09000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ EV00000533	TST_EVENT_01	Buy	RFx	09000	Pending Post Approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ EV00000532	IronClad Testing	Buy	RFx	83000	10/14/2024 07:15 AM CDT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ EV00000518	SW0685 Flashing LE...	Buy	RFx	09000	09/27/2024 03:00 PM CDT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ EV00000456	Maternal Child & H...	Buy	RFx	34000	Event Completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ EV00000531	Test	Buy	RFx	04000	Event Completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Use this page to:

- Search and sort events.
- View event details by **selecting** the **Event ID** link.
- Display details of the line items for an event by clicking the arrow at the left of the event row.

Use the **Search Criteria** section of the page to retrieve only desired Events.

Created By: Use this field to display only those Event created by a particular User.

Event Format/Type: Display only those Events that are of a particular format or type.

Event Status: Select only Events in a particular event status.

Category/Item ID: Display only those Events with Event Lines containing a particular purchasing Category or Item.

Only show Events I created: Select this checkbox to view only Events created by the user.

Only show Active Events: Select this checkbox to view only Events in an active status.

Select the **Default Search Preferences** link.

Event Workbench Search Preferences for Bosten Benn

Search Defaults

Business Unit

<p>Event ID Contains <input type="text"/></p> <p>Event Format = <input type="text" value="Buy"/> ▼</p> <p>Event Status = <input type="text"/> ▼</p> <p>Event Type = <input type="text" value="RFx"/> ▼</p>	<p>From Start Date = <input type="text" value="09/25/2024"/> <input type="button" value="Calendar"/></p> <p>To Start Date = <input type="text"/> <input type="button" value="Calendar"/></p> <p>From End Date = <input type="text"/> <input type="button" value="Calendar"/></p> <p>To End Date = <input type="text"/> <input type="button" value="Calendar"/></p>	<p>Sort With = <input type="text" value="End Date"/> ▼</p> <p>Sort Order = <input type="text" value="Ascending"/> ▼</p> <p><input checked="" type="checkbox"/> Only show Events I created</p>
--	--	---

[Return to Event Workbench](#)

Use the **Search Preferences** page to set default search criteria that will be used each time the user enters the Workbench.

Sort With: Select how the Events will be sorted.

Sort Order: Select the order in which the Events will be sorted based on the 'Sort With' field.

Only Show Events I Created: Select this checkbox to view only those Events created by the User each time the Workbench is used.


Select the **Save** button to store the Search Default values.


Select the **Return to Event Workbench** link.


Select the **Search** button to retrieve Events matching the Search Criteria.


Event ID	Name	Format	Type	Unit	Status				
EV00000533	TST_EVENT_01	Buy	RFx	09000	Pending Post Approval				
EV00000534	TST_EVENT_2	Buy	RFx	09000	Open				
EV00000535	TST_RFI_EVENT	RFI	RFx	09000	Pending Post Approval				


What do the other icons on the Event ID Line represent?



 Cancel Event



 Approval Status


 Event History


 Analyze Bids


 Edit Event (Not used at this time.)


 Create New Version (Re-bid)


 View Bid History

Use the **Cancel Event** icon to cancel the event.

Cancel Event for: Bosten Benn

Event Information

Business Unit	Event ID	Event Name	Round	Version	Format	Status	Bids Received
09000	EV00000533	TST_EVENT_01	1	1	Buy	Pending Post Approval	No

Line Information

Line	Category	Item ID	Item Description	Quantity	UOM	Extended Price
1	43211600		FY24 Dell Latitude 7440	1	EA	39.37

[Cancel Event](#)

To confirm the Event Cancellation, **select the Cancel Event** button. The user will be prompted to verify the cancellation, **select the Yes** button to confirm.

Select the Return to Event Workbench link to stop the Event Cancellation.

Event ID	Name	Format	Type	Unit	Status						
EV00000533	TST_EVENT_01	Buy	RFx	09000	Pending Post Approval						
EV00000534	TST_EVENT_2	Buy	RFx	09000	Open						
EV00000535	TST_RFI_EVENT	RFI	RFx	09000	Pending Post Approval						

A displayed Approval Status icon indicates the event is pending approval. Once posted, this icon will disappear.

Select the **Approval Status** icon to review the Approval.

Approval Status

Business Unit 09000 Event ID: EV00000535 Round 1 Version 1 Format RFI

Event Type	RFx	Start Date	09/25/2024 10:37AM CDT
Event Status	Pending Post Approval	End Date	10/16/2024 10:37AM CDT
Event Name	TST_RFI_EVENT	Entered By	BBENN06
Description	RFI Testing Event		

Review/Edit Approvers

Sourcing Approval

Approval Status: Pending

Sourcing Approval

Pending

Multiple Approvers

Branch Manager

Select the **Multiple Approvers** link to view users in the Approval Workflow level.

Select the **Return to Event Workbench** link.

Legend

Search Results 1-25 of 136 | View 100

Event ID	Name	Format	Type	Unit	Status							
EV00000535	TST_RFI_EVENT	RFI	RFx	09000	Pending Post Approval							
▶ EV00000534	TST_EVENT_2	Buy	RFx	09000	Open							
▶ EV00000533	TST_EVENT_01	Buy	RFx	09000	Pending Post Approval							
▶ EV00000532	IronClad Testing	Buy	RFx	83000	10/14/2024 07:15 AM CDT							
▶ EV00000518	SW0685 Flashing LE...	Buy	RFx	09000	09/27/2024 03:00 PM CDT							
▶ EV00000456	Maternal Child & H...	Buy	RFx	34000	Event Completed							
▶ EV00000531	Test	Buy	RFx	04000	Event Completed							

Use the **Event History** icon to view history for an Event.

Event History

Event Information

Bus. Unit	Event ID	Event Name	Format	Type	Status
04000	EV00000531	Test	Buy	RFx	Posted

Version History

1-1 of 1 | View All

Round	Version	Event Status	Modified By		
	1	1 Posted	OFS config User		

Event Stage

Create Event
 Event Approval
 Dispatch Event
 Receive Bids
 Analyze Bids
 Award Event

The **Event History** page shows the history of the Event as it has progressed through the Event Lifecycle.

Version History: This section of the page shows the 'Round' and 'Version' history for an Event.

Use the lookup icon to navigate directly to a particular Round or Version of the Event.

Event Stage: This section of the page allows the user to navigate directly to the Event, Bid Responses, or Award Transaction (Purchase Order or Contract).

Legend

Search Results 1-25 of 136 | View 100

Event ID	Name	Format	Type	Unit	Status							
EV00000535	TST_RFI_EVENT	RFI	RFx	09000	Pending Post Approval							
▶ EV00000534	TST_EVENT_2	Buy	RFx	09000	Open							
▶ EV00000533	TST_EVENT_01	Buy	RFx	09000	Pending Post Approval							
▶ EV00000532	IronClad Testing	Buy	RFx	83000	10/14/2024 07:15 AM CDT							
▶ EV00000518	SW0685 Flashing LE...	Buy	RFx	09000	09/27/2024 03:00 PM CDT							
▶ EV00000456	Maternal Child & H...	Buy	RFx	34000	Event Completed							
▶ EV00000531	Test	Buy	RFx	04000	Event Completed							

Use the Analyze Bids icon to transfer to the Analyze Bids pages to evaluate and award an Event.

NOTE: The Analyze Bids page allows the user to view bid responses, bid questions, comments, etc. The Event is awarded from these pages as well.

Analyze Total

Analyze Total [Analyze Line](#)

Business Unit:	Event ID:	Round:	Version:	Event Name:	
04000	EV00000531	1	1	Test	
Event Format:	Event Type:	Currency:	End Date:	Status:	Go To:
Buy	RFx	USD	09/19/2024 2:27PM CDT	Posted	<input type="text"/>

▶ [Bid Analysis and Display Options](#) ?

Analysis

	Bidder Name	JONES PUBLIC RELATIONS INC	PRINCIPAL TECHNOLOGIES INC
Event Version Responded To		1	1
Bid Number		1	1
Total Bid Amount		800.00	1,000.00
Total Bid Cost		0.00	0.00
Total Event Score		100.00	99.75
Total Header Cost		0.00	0.00
Total Header Score		0.00	0.00

Bid Action	<input type="text" value="NA"/>	<input type="text" value="NA"/>
Reject Reason	<input type="text"/>	<input type="text"/>
Award by Percent	<input type="text"/>	<input type="text"/>
Hide Bid	<input type="checkbox"/>	<input type="checkbox"/>

Legend

Search Results 1-25 of 136 | View 100

Event ID	Name	Format	Type	Unit	Status									
EV00000535	TST_RFI_EVENT	RFI	RFx	09000	Pending Post Approval									
EV00000534	TST_EVENT_2	Buy	RFx	09000	Open									
EV00000533	TST_EVENT_01	Buy	RFx	09000	Pending Post Approval									
EV00000532	IronClad Testing	Buy	RFx	83000	10/14/2024 07:15 AM CDT									
EV00000518	SW0685 Flashing LE...	Buy	RFx	09000	09/27/2024 03:00 PM CDT									
EV00000456	Maternal Child & H...	Buy	RFx	34000	Event Completed									
EV00000531	Test	Buy	RFx	04000	Event Completed									

The Create New Version icon is used to rebid an event.

NOTE: In the situation that the event needs to be changed, the Create New Version icon should be used instead of the Edit Event icon. This will open a new version in the current round and will allow the user to make changes and repost the updated Event.

View Bid History icon: Utilize this icon to view the event stages.

Event Bid History

Event ID	Event Name	Round	Version	Event Type	End Date	Status
04000-EV00000531	Test	1	1	RFx	09/19/24 2:27PM CDT	Posted

Report Type

Event Invitation
 Best Bids
 Bidder/Bid
 List By Line
 Charts

[Refresh](#)

Event Participation Activity

Total Event Invitations: 59
 Accepted Invitations: 2
 Declined Invitations: 0
 No Response: 57

[Return to Event Workbench](#)

The **Event Bid History** page displays Event bid history and related reporting.

Report Type: Define the type of display that will be visible at the bottom of the page.

Event Participation Activity: Displays the number of invited bidders and bidders who have accepted, declined, or not responded.

Use the **Refresh** button to retrieve new results based on selection criteria.

Select the **Best Bids** radio button.

Event Bid History

Event ID	Event Name	Round	Version	Event Type	End Date	Status
04000-EV00000531	Test	1	1	RFX	09/19/24 2:27PM CDT	Posted

Report Type

Event Invitation
 Best Bids
 Bidder/Bid
 List By Line
 Charts

[Refresh](#)

Bids

1-2 of 2

Bidder Name	Bid ID	Date Time Posted	Score	Rank	Bid Status	Price
JONES PUBLIC RELATIONS INC	1	09/19/24 8:18:13AM	100.00	1	Winning	800.00 USD
PRINCIPAL TECHNOLOGIES INC	1	09/18/24 1:10:36PM	99.75	2	Outbid	1,000.00 USD

[Return to Event Workbench](#)


The **Best Bids** option shows the bid results by Price and Score.

The **List by Line** option shows each bid response by Event Line.


Select the **Return to Event Workbench** link.

Discussion Forum (Q&A)

Navigation > Sourcing > Maintain Events > Discussion Forums

Discussion Forums			
Forum User Preferences			
Forums			
 1-1 of 1 View All			
Discussion Forums	Description	Read Only	Posts
Event QA	Event Q&A Forum	No	1405

Select the [Event QA](#) link.

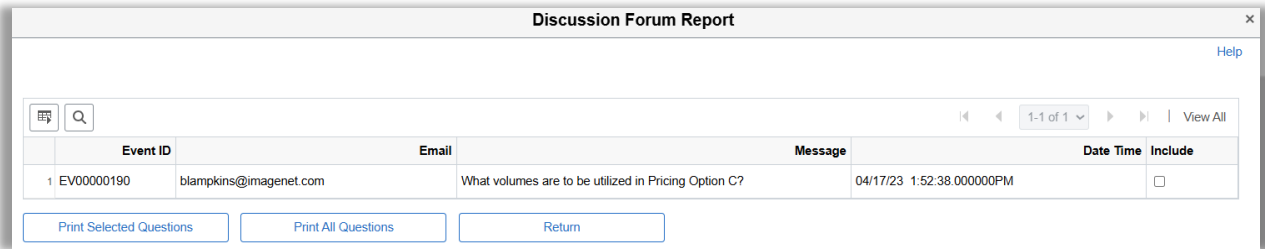
Event Q&A				
Forums				
Search Forum <input type="text"/>		<input type="button" value="Search"/>		
Message Threads				
 1-20 of 311 View 100				
Subject	Author	Date Posted	Posts	Q & A Report
80500 EV00000163 Rnd:1 Ver:1	Susan Smith	03/02/23 3:51:04.000000PM CST	1	Q & A Report
26500 EV00000165 Rnd:1 Ver:1	Kimberly R Coulter	03/07/23 10:51:19.000000AM CST	1	Q & A Report
09000 EV00000166 Rnd:1 Ver:1	Marc Brown (090)	03/07/23 1:36:17.000000PM CST	3	Q & A Report
09000 EV00000168 Rnd:1 Ver:1	Cristy Diane Newton	03/08/23 5:12:38.000000PM CST	2	Q & A Report
62800 EV00000169 Rnd:1 Ver:1	Melisha Marie Platt	03/09/23 2:58:14.000000PM CST	1	Q & A Report
26500 EV00000173 Rnd:1 Ver:1	Melisha Marie Platt	03/13/23 1:50:26.000000PM CDT	1	Q & A Report
10500 EV00000174 Rnd:1 Ver:1	Richard Diaz	03/14/23 2:09:53.000000PM CDT	1	Q & A Report
13100 EV00000178 Rnd:1 Ver:1	Richard Diaz	03/15/23 3:31:11.000000PM CDT	1	Q & A Report

Use the Event Discussion page to view an event message and post a reply.

Enter the Event Number in the Search Forum field and **select** the **Search** button to narrow search results.

Q&A Report

Select the **Q & A Report** link to access the Discussion Forum Report.



Select the **Include** checkbox for lines you want to print and select the **Print Selected Questions** button.

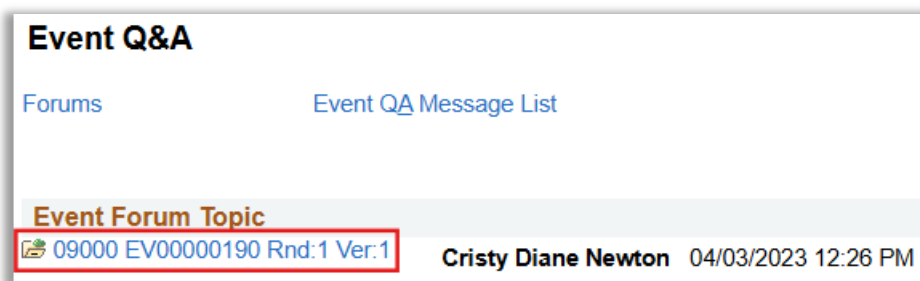
The system will download the Discussion Forum Report in Word format which you may Save.



After the Discussion Forum Report has been reviewed and the questions have been answered, the user will post the Q&A as an amendment, page 60, or attach it as a response to the question, shown on the next pages.

Responding to Bidder Questions


Select a linked event in the Subject column to access the discussion forum for that event.



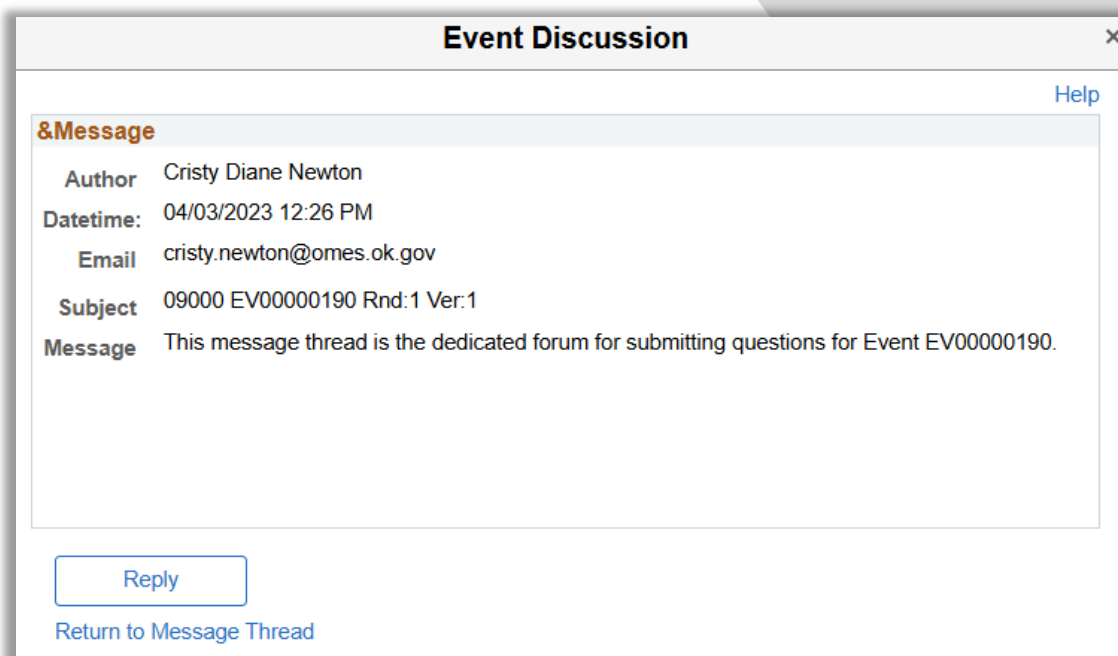
Event Q&A

[Forums](#) [Event QA Message List](#)

Event Forum Topic

 09000 EV00000190 Rnd:1 Ver:1	Cristy Diane Newton 04/03/2023 12:26 PM
--	--

Select an event forum topic link to view an event message. This is also where you may find any attachments a bidder may have included.



Event Discussion [x]

[Help](#)

&Message

Author Cristy Diane Newton
Datetime: 04/03/2023 12:26 PM
Email cristy.newton@omes.ok.gov
Subject 09000 EV00000190 Rnd:1 Ver:1
Message This message thread is the dedicated forum for submitting questions for Event EV00000190.

[Reply](#)

[Return to Message Thread](#)

After viewing the message, **select** the **Reply** button to post a message to the event forum for this topic.

Groupbox

Author: Private Message

Datetime: 09/25/2024 03:11 PM

Email:

Subject:

Message:

[Add Attachment](#)

[Return to Message Thread](#)

Private Message: **Select** to mark the message private so that only you and the person to whom you are replying can see the message. This option is available only for event creators. Bidders can send only private messages, and replies to bidders are also private only.

The user can add an attachment to their reply by **selecting** the **Add Attachment** link and selecting a file from device.

Select the **Submit** button to submit the response to the forum.

Once the reply has been submitted, **select** the **Return to Message Thread** link.

Analyze and Award Bid Responses

Analyze Bid Responses

Bid Analysis is the process of viewing supplier responses, analyzing, and awarding the Event. Award can be done to Purchase Order or Contract.

Navigation: Sourcing > Maintain Events > Event Workbench

Event Workbench

Search Criteria

Business Unit: 09000

Event ID: EV00000276

Created By: [Search]

Event Format: [Dropdown]

Event Type: [Dropdown]

Event Status: Pending Award

Associated With Plan: [Search]

From Start Date: [Calendar] To Start Date: [Calendar]

From End Date: [Calendar] To End Date: [Calendar]

Category: [Text]

Item ID: [Text]

Description: [Text]

Plan Name: [Text]

Sort With: [Dropdown]

Sort Order: [Dropdown]

Only show Events I created

Only show Active Events

Use my search defaults

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

[Default Search Preferences](#)

Search Results [Search] | [Navigation] | 1-1 of 1 | View All

Event ID	Name	Format	Type	Unit	Status
EV00000276	Supplemental RFP-S...	Buy	RFx	09000	Pending Award

[Icons: Close, Print, Refresh, Analyze Bids, Edit, Save, Share, Help, Search, Mail]

Select the **Analyze Bids** icon from the Workbench.

Analyze Total

Analyze Total [Analyze Line](#)

Business Unit: 09000 Event ID: EV0000276 Round: 1 Version: 1 Event Name: Supplemental RFP-SW1048-Surveillance Equipment&ser
 Event Format: Event Type: Currency: USD End Date: 09/05/2023 3:00PM CDT Status: Pending Award Go To: ...

Buy RFX

Bid Analysis and Display Options

Header Weighting: [] Sort Bids By: Total Event Score Sort Order: Descending [Analyze](#)

Display Options: View Factor Responses Display Delta Responses Display Disqualified Bids Display Withdrawn Bidders

View Bid Actions: All Bid Actions Award Counter Disallow Reject <No Action>

Analysis

	Bidder Name	JOHNSON CONTROLS US HOLDINGS LLC	ENDEX OF OKLAHOMA INC	JE SYSTEMS INC	TECHSICO ENTERPRISE SOLUTIONS LLC	SUMMIT FIRE & SECURITY LLC
Event Version Responded To	1	1	1	1	1	1
Bid Number	1	1	3	1	2	
Total Bid Amount	7.00	6.00	6.00	6.00	6.00	6.00
Total Bid Cost	7.00	6.00	6.00	6.00	6.00	6.00
Total Event Score	100.00	90.00	90.00	90.00	90.00	90.00
Total Header Cost	0.00	0.00	0.00	0.00	0.00	0.00
Total Header Score	80.00	80.00	80.00	80.00	80.00	80.00

Bid Action: NA NA NA NA NA

Reject Reason: [] [] [] [] []

Award by Percent: [] [] [] [] []

Hide Bid:

Factors

Recalculate Add / Edit Factors Unhide Bids << < > >>

Save Return to Search Previous in List Next in List

Use the **Analyze Events – Total** page to view each suppliers bid response and award the entire event to a single supplier or award multiple suppliers by percentage.

The Bid Analysis and Display Options section initially appears collapsed. **Select** the arrow to the left of the section to expand.

Sort Bids By: Sort the supplier bids by Score, Amount, or Name.

Sort Order: Use this option to view results in ascending or descending order.

View Bid Actions: Determine which types of Bid Responses to view.



Total Bid Amount: This field displays the sum of all Event Line response amounts.





NOTE: The user may Disallow, Reject, or Counter the Bid. A Counter action will initiate a new Round for the Event.

Factors Section: This section initially appears collapsed. **Select** the arrow to the left of the **Factors** section heading to expand and view supplier Event Header responses to Bid Factor questions.



Factors





Weighting UOM Ideal




Do you Have an Oklahoma Sales Tax Permit?
 50.00000 Y  Y Y Y Y 

Please provide your sales tax permit number or statutory exemption
 10.00000  STS-10076997-07 1889730560  188301312  Sales account ID: S 790077440 

Are you registered with the Oklahoma Secretary of State?
 10.00000 Y Y Y Y Y

What is your Oklahoma Secretary of State Filing Number? Note: if not registered, the successful bidder will be required to register with the Secretary of State or must attach a signed statement that provides specific details supporting the exemption the supplier is claiming, prior to the contract award.
 10.00000  3400663743 1900527126 2312020640 3513014623 3712781155 

Do you carry Workers Compensation Insurance Coverage? Bidder is required to provide with the bid a certificate of insurance showing proof of compliance with the Oklahoma Workers Compensation Act. YES - Include a certificate of insurance with bid NO - attach a signed statement that provides specific details supporting the exemption you are claiming from the Workers Compensation Act.
 10.00000 Y Y Y  Y  Y  Y 

Have you read and agreed to the attached Non-Collusion Certification statement (DCS-FORM-CP-004)?
 10.00000 Y Y Y  Y  Y 

Do you acknowledge receipt of the solicitation amendment? By clicking yes below bidder acknowledges receipt and acceptance of this solicitation amendment content.
 0.00000 Y

[Recalculate](#) [Add / Edit Factors](#) [Unhide Bids](#) [<<](#) [<](#) [>](#) [>>](#)

Select the Comments Icon to view comments and attachments associated with that particular bid response.





Response Factor Comments/Attachments


Business Unit 09000 Event ID EV00000276 [Help](#)

Comments

Comment Text:

Attachments

  1-1 of 1  

Attached File	Attachment Description	
OK_ST_Tax_Permit_-_OKC_2023-26.pdf	Tax Permit	

[Return](#)

Select the **View** icon, outlined above, to open the attachment in a new tab. After reviewing the comments and attachments, select the **Return** button.

Analyze Total

Analyze Total [Analyze Line](#)

Business Unit: 09000 Event ID: EV00000276 Round: 1 Version: 1 Event Name: Supplemental RFP-SW1048-Surveillance Equipment&ser

Event Format: Event Type: Currency: USD End Date: 09/05/2023 3:00PM CDT Status: Pending Award Go To:

Buy: RFX

Bid Analysis and Display Options [?](#)

Header Weighting: Sort Bids By: Total Event Score Sort Order: Descending [Analyze](#)

Display Options: View Factor Responses Display Delta Responses Display Disqualified Bids Display Withdrawn Bidders

View Bid Actions: All Bid Actions Award Counter Disallow Reject <No Action>

Analysis

	Bidder Name JOHNSON CONTROLS US HOLDINGS LLC	ENDEX OF OKLAHOMA INC	JE SYSTEMS INC	TECHSICO ENTERPRISE SOLUTIONS LLC	SUMMIT FIRE & SECURITY LLC
Event Version Responded To	1	1	1	1	1
Bid Number	1 ?	1 ?	3	1 ?	2 ?
Total Bid Amount	7.00	6.00	6.00	6.00	6.00
Total Bid Cost	7.00	6.00	6.00	6.00	6.00
Total Event Score	100.00	90.00	90.00	90.00	90.00
Total Header Cost	0.00	0.00	0.00	0.00	0.00
Total Header Score	80.00	80.00	80.00	80.00	80.00

Bid Action: NA NA NA NA NA

Reject Reason:

Award by Percent:

Hide Bid:

Factors

[Recalculate](#) [Add / Edit Factors](#) [Unhide Bids](#) [<<](#) [<](#) [>](#) [>>](#)

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

Use the **arrow buttons** in the bottom right of the page to view additional bid responses. Select the **Bidder Name** link to access the supplier information.

Supplier ID 0000508489 Short Name JOHNSON CO-018 [Help](#)

Name JOHNSON CONTROLS US HOLDINGS LLC Contact 1

Location 0003 Address 3

Details

Name SCOTT SIMPSON Prefix

Title Fire Sales Manager Phone ^^

Country USA United States Ext

Address 1 JOHNSON CONTROLS FIRE PROTECTION LP Prefix

Address 2 DEPT CH 10320 Fax

Address 3

Address 4

City PALATINE Postal 60055-0320

County State IL

URLID http:// [View Internet Address](#)

Email ID noreply@omes.ok.gov

[OK](#) [Cancel](#)

Select the **OK** button to return to the Analyze Total page.

Select the **Comment Icon** in the Analysis section, outlined on the previous page, to review comments and attachments for the associated bid.

Event Comments and Attachments

[Help](#)

Business Unit 09000 Event ID EV00000276

Comments

Comments:

JCI will submit the OMES IT Security Certification as soon as it is complete. Per email from Cini on 9-1-23, we can provide it to her as soon as JCI Corporate has completed filling it out.

Please advise if the State needs any other information from JCI Fire Protection.

Respectfully,

Attachments

🔍 🔍 1-11 of 11

Attached File	Attachment Description	Event RFX Doc	
EV00000276-OMESFormCP076_Signed.pdf		<input type="checkbox"/>	
EV00000276_RESPONSE_Exhibit_1.docx		<input type="checkbox"/>	
BID_Cover_Letter.doc		<input type="checkbox"/>	
Johnson_Controls_Exhibit_2-_Price_Template.xlsx		<input type="checkbox"/>	
Sample_COI_4.6.2023.pdf		<input type="checkbox"/>	
EV00000276-OMESFormCP004_Signed.pdf		<input type="checkbox"/>	

Select the **View** icon to open the attachment in a new tab.

NOTE: This page displays comments and attachments that apply to the entire event.

After reviewing the comments and attachments, **select the Return** button.

Select the **Analyze Line** link to award by the line.

Analyze Line

Analyze Line

Analyze Line

Business Unit: 09000 Event ID: EV00000276 Round: 1 Version: 1 Event Name: Supplemental RFP-SW1048-Surveillance Equipment&ser

Event Format: Buy Event Type: RFX Currency: USD End Date: 09/05/2023 3:00PM CDT Status: Pending Award Go To:

Line Items ?

1-7 of 7 View All

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1		Video Surveillance& Security Detection	46171621	EA	0.01000	1.0000	0.0000	10.00000	Open	Analyze
2		Access Control Systems	46171619	EA	0.01000	1.0000	0.0000	10.00000	Open	Analyze
3		Mass Notification	46191505	EA	0.01000	1.0000	0.0000	10.00000	Open	Analyze
4		Burglar Alarms	72151703	EA	0.01000	1.0000	0.0000	10.00000	Open	Analyze
5		Surveillance Services and Equipment	46171600	EA	0.01000	1.0000	0.0000	10.00000	Open	Analyze
6		Portable Fire Extinguishers	46191608	EA	0.01000	1.0000	0.0000	10.00000	Open	Analyze
7		Inspection & Monitoring-Fire Extinguishing Systems, Fire Sprinkler Systems, Alarm Monitoring, Fire Alarm/Protective Signaling Systems	92121701	EA	0.01000	1.0000	0.0000	40.00000	Open	Analyze

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

Select the **Analyze** link to view the Analyze Line page for the associated line item.

Analyze Line

Business Unit: 09000 Event ID: EV00002761 Round: 1 Version: 1 Event Name: Supplemental RFP-SW1048-Surveillance Equipment&ser
 Event Format: Event Type: Currency: End Date: Status:

Buy RFX USD 09/05/2023 3:00PM CDT Pending Award

Line 1 Requested Quantity 1.0000 UOM EA Start Price 0.01000 Weighting 10.00000 Previous Line Next Line

Item ID Item Description: Video Surveillance& Security Detection

Bid Analysis and Display Options

Analyze Qty: 1.0000 Sort Bids By: Line Score Sort Order: Descending Analyze

Display Options: View Factor Responses Display Delta Responses Display Disqualified Bids Display Withdrawn Bidders

View Bid Actions: All Bid Actions Award Counter Disallow Reject <No Action>

Analysis

	Bidder Name US TECHNOLOGIES INC TURN-KEY SECURITY SOLUTIONS LLC	TRANS-TEL CENTRAL LLC	TECHSICO ENTERPRISE SOLUTIONS LLC	SUMMIT FIRE & SECURITY LLC
Event Version	1	1	1	1
Bid Number	1	1	2	2
Bid Quantity	1.0000	1.0000	1.0000	1.0000
Minimum Bid Quantity	0.0000	0.0000	0.0000	0.0000
Total Bid Amount	1.00	1.00	1.00	1.00
Total Bid Cost	1.00	1.00	1.00	1.00
Total Line Score	100.0000	100.0000	100.0000	100.0000
Bid Action	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Reject Reason Code	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Award by Percent	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Award Quantity	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Hide Bid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Factors

Recalculate Unhide Bids << < > >> Go To Line

OK Cancel Apply

Use the **Analyze Line** page to analyze and award events by Line.

Sort Bids By – sort the supplier bids by Score, Amount or Name.

Sort Order – use this option to view results in ascending or descending order.

View Bid Actions – determine which types of Bid Responses to view.

Total Bid Amount – this field displays the sum of all Event Line response amounts.

NOTE: The user may Disallow, Reject or Counter the Bid. A Counter action will initiate a new Round for the Event.

Factors Section – This section initially appears collapsed. **Select** the arrow to the left of the **Factors** section heading to expand and view supplier Event Header responses to Bid Factor questions.

When multiple supplier bid responses exist, use the arrow buttons in the bottom right of the page to view additional bid responses.

Select the **Comment Icon** in the Analysis section to review comments and attachments for the associated bid.

Response Line Comments/Attachments x

[Help](#)

Business Unit 09000 Event ID EV00000276 Line 1


Comments

Comments: ✖

Attachments

☰ 🔍

 ⏪ ⏩ 1-1 of 1 ⏪ ⏩

Attached File	Attachment Description	
Exhibit_2-Price_Video_Surveillance.xlsx		

Return

Select the **View** icon, outlined above, to open the attachment in a new tab.

NOTE: This page displays comments and attachments that apply to the line only.

After reviewing the comments and attachments, **select** the **Return** button.

To return to the **Analyze Total** page, **select** the **Cancel** button, then the **Analyze Total** link.

Awarding Bid Responses: Award to Supplier

Analyze Total

Analyze Total Analyze Line

Business Unit: 09000 Event ID: EV00000276 Round: 1 Version: 1 Event Name: Supplemental RFP-SW1048-Surveillance Equipment&ser

Event Format: Buy Event Type: RFX Currency: USD End Date: 09/05/2023 3:00PM CDT Status: Pending Award Go To:

▼ Bid Analysis and Display Options

Header Weighting: Sort Bids By: Total Event Score Sort Order: Descending Analyze

Display Options: View Factor Responses Display Delta Responses Display Disqualified Bids Display Withdrawn Bidders

View Bid Actions: All Bid Actions Award Counter Disallow Reject <No Action>

Analysis

	Bidder Name JOHNSON CONTROLS US HOLDINGS LLC	ENDEX OF OKLAHOMA INC	JE SYSTEMS INC	TECHSICO ENTERPRISE SOLUTIONS LLC	SUMMIT FIRE & SECURITY LLC
Event Version Responded To	1	1	1	1	1
Bid Number	1	1	3	1	2
Total Bid Amount	7.00	6.00	6.00	6.00	6.00
Total Bid Cost	7.00	6.00	6.00	6.00	6.00
Total Event Score	100.00	90.00	90.00	90.00	90.00
Total Header Cost	0.00	0.00	0.00	0.00	0.00
Total Header Score	80.00	80.00	80.00	80.00	80.00

Bid Action: Award NA NA NA NA

Reject Reason:

Award by Percent: 100

Hide Bid:

► Factors

Recalculate Add / Edit Factors Unhide Bids << < > >>

Save Return to Search Previous in List Next in List

After reviewing the bid responses and the decision to award one or more of the suppliers has been made, **select** the **Award** option in the **Bid Action** field for that bid response.

NOTE: You can award the event to a single bidder or distribute the award across multiple bidders. For awarding an event to multiple bidders, distribute Award by Percentage across the available suppliers, with the total Award Percentage sum of 100.

Enter the award percentage and **select** the **Save** button.

Once the bid has been evaluated and a recommendation for award has been made, navigate to the **Analyze Events** page:

Select the **Award Events** option from the Go To dropdown menu.

Award Option 1: Award to Supplier

Award Details

Award Details [Award Summary](#) [Review Constrains](#)

Business Unit: 09000 Event ID: EV0000276 Round: 1 Version: 1 Event Name: Supplemental RFP-SW1048-Surveillance Equipment&ser

Event Format: Buy Event Type: RFX Currency: USD End Date: 09/05/2023 3:00PM CDT Status: Pending Award Go To: ...

▼ Show Award Details to Bidders

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

Award Details ⓘ

Bidder Name: JOHNSON CONTROLS US HOLDINGS LLC

Award Type: Procurement Contract

*Contract Style: Purchase Order

Bidder Type: Supplier

Award Currency: Event USD

PO Business Unit: 09000

Buyer: CZACHARIA

Terms: 45

Award Number: 1 Total Award: 7.0000

Award Lines

Line	Item ID	Supp/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price		
1		☑	Video Surveillance& Security Detection		EA	1.0000	1.0000	1.0000		
2		☑	Access Control Systems		EA	1.0000	1.0000	1.0000		
3		☑	Mass Notification		EA	1.0000	1.0000	1.0000		
4		☑	Burglar Alarms		EA	1.0000	1.0000	1.0000		
5		☑	Surveillance Services and Equipment		EA	1.0000	1.0000	1.0000		
6		☑	Portable Fire Extinguishers		EA	1.0000	1.0000	1.0000		
7		☑	Inspection & Monitoring-Fire Extinguishing Systems, Fire Sprinkler Systems, Alarm Monitoring, Fire Alarm/Protective Signaling Systems		EA	1.0000	1.0000	1.0000		

Post Award

Save Return to Search Notify

Award Type: Select the type of award to be used: *Purchase Order*, or *Procurement Contract*.

Contract Style: When the award type is Procurement Contract, select Purchase Order.

NOTE: Generally, the award type will be Procurement Contract, and the Contract Style will be Purchase Order, unless otherwise known.

Bidder Type: If the bidder is a registered supplier with the state, this field will show "Supplier". If the field shows "Bidder", user must check if the Bidder has a Supplier ID or reach out to Supplier Registration for the bidder to be assigned a Supplier ID.

PO Business Unit: Enter the Business Unit where the Purchase Order will be created after the event is awarded.

Select the **Post Award** button to award the event to selected supplier(s).

Notice of Intent to Award is not sent for this event. (18058,8692)

Do you wish to continue?

Yes

No

Select the **Yes** button to award the event.

Award Details

[Award Summary](#) [Review Constraints](#)

Award Details	Event ID:	Round:	Version:	Event Name:
Business Unit:	EV00000276	1	1	Supplemental RFP-SW1048-Surveillance Equipment&ser
Event Format:	Event Type:	Currency:	End Date:	Status: Status:
Buy	RFX	USD	09/05/2023 3:00PM CDT	Awarded

Go To:

Show Award Details to Bidders

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

Award Details ? 1 of 1

Bidder Name JOHNSON CONTROLS US HOLDINGS LLC	Bidder Type Supplier	Buyer CZACHARIA
Award Type Procurement Contract	Award Currency Event USD	Terms 45
Contract Style Purchase Order	PO Business Unit 09000	
Contract ID 000000000000000000000007518	Total Award 7.0000	
Award Number 1		

Notice the **Event Status** changed to **Awarded**.

Select the **Contract ID** link to open the contract created from the award. After making any necessary changes, approve, save and dispatch the contract.

Contract Entry

Contract

SetID	00000	Contract Version	Version	1	Status	Current
Contract ID	0000000000000000000000007518	Approval Due Date	<input type="text"/>			
*Status	Open					
Administrator/Buyer	CZACHARIA				Add a Document	
Cini Zacharia (090)						
▼ Header ?						
*Contract Style	Purchase Order					
Process Option	Purchase Order					
*Supplier	JOHNSON CO-01	Supplier Search				
*Supplier ID	0000508489	JOHNSON CONTROLS US HOLDINGS LLC				
Primary Contact	<input type="text"/>					
Supplier Contract Ref	<input type="text"/>					
Description	Supplemental RFP-SW1048-Survei					
Master Contract ID	<input type="text"/>					
*Begin Date	09/26/2024					
Expire Date	<input type="text"/>					
Renewal Date	<input type="text"/>					
Control Type	<input type="text"/>					
<input type="checkbox"/> Tax Exempt	Tax Exempt ID	<input type="text"/>				
<input checked="" type="checkbox"/> Auto Default						
<input type="checkbox"/> Lock Chartfields						
		<input checked="" type="checkbox"/> Statewide Contract				
Currency	USD					
Rate Date	09/26/2024	CRRNT				
		<input type="checkbox"/> Must Use Contract Rate Date				
		<input checked="" type="checkbox"/> Allow Multicurrency PO				

- [Edit Comments](#)
- [Contract Activities](#)
- [Primary Contact Info](#)
- [Contract Header Agreement](#)
- [Contract Releases](#)
- [Custom Fields](#)
- [Activity Log](#)
- [Document Status](#)
- [Thresholds & Notifications](#)
- [Price Adjustment Template](#)
- [Purchase Order BU Defaults](#)

Awarding Bid Responses: Award to Bidder with Supplier ID

Once the user has identified the bidder has an existing Supplier ID, they can award the event by selecting the bidder and entering the Supplier ID. The Buyer will run the Public query FEI_Check to verify the Bidder's TIN matches the Supplier's TIN and if they do, the user can choose the bidder.

The steps to run the query, then award the event are shown below:

Navigation>Reporting Tools>Query>Query Viewer

Query Viewer

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

*Search By begins with

[Search](#) [Advanced Search](#)

Input the Query Name, FEI_Check, and **select** the **Search** button.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
FEI_CHECK		Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

The Query results section allows the user to Run the Query to HTML, Excel, or XML. This example shows running to HTML.

Select the **HTML** hyperlink.

FEI_CHECK

ID Num

[View Results](#)

The user will input the Bidder's TIN number and **Select** the **Search** button to retrieve the Supplier TIN number to ensure it matches and can view the Supplier ID. The example below displays the results for the Bidder selected on the next page.

Row	SetID	Supplier	ID Num
1	00000	0000250468	541321839

COMPUTER SOLUTION COMPANY OF VIRGINIA INC

Input the **PO Business Unit** and **Supplier ID** for the associated Bidder.

Award Type: Select the type of award to be used: *Purchase Order*, or *Procurement Contract*.

Contract Style: When the award type is Procurement Contract, select Purchase Order.

NOTE: Generally, the award type will be Procurement Contract, and the Contract Style will be Purchase Order, unless otherwise known.

Bidder Type: If the bidder is a registered supplier with the state, this field will show “Supplier”. If the field shows “Bidder”, but the user has confirmed that they have a Supplier ID, they can still award to this bidder. Otherwise, the user must reach out to Supplier Registration to have a Supplier ID assigned to the Bidder.

PO Business Unit: Enter the Business Unit where the Purchase Order will be created after the event is awarded.

Supplier ID: When awarding to a Bidder that has a Supplier ID, input the Supplier ID found on the **FEI_CHECK** query.

Select the **Post Award** button to award the event to selected supplier(s).

Select the **Yes** button to award the event.

NOTE: This will change the status to Awarded and the user can access the Procurement Contract in the same manner as when awarding to a Supplier (Page 90).

NOTE: If the user does not enter the Supplier ID, they will receive the following message:

Automatic Supplier creation is not allowed. A Supplier ID must be entered for this bidder.

OK

The user must either enter the Supplier ID if available or contact Supplier Registration if the Bidder has not previously been established as a Supplier.

NOTE: If the Bidder does not have an existing Supplier ID, the user must reach out to supplier registration via the service desk to have a help desk ticket created for the bidder to be converted.
