

#### **Strategic Sourcing Collaboration Overview**

The Strategic Sourcing (SS) Buyer can select other Cardinal users, known as Collaborators, to participate in an event or in the bid analysis process.

The SS Buyer who is responsible for the event may not have all of the information that is critical to the event. In those circumstances, the SS Buyer may choose to distribute the event to the stakeholders for input prior to posting the event. This allows them to get everyone's input into the event and ensure that everyone agrees on the overall objectives of the procurement.

Collaboration is also useful during bid analysis. By allowing stakeholders to review the bids and provide input on bid factor weightings, text based scoring and the like, the buyer can be certain that the interests of all the collaborators are factored in on the award decision. The system calculates an average score based on the input of all the collaborators.

The SS Buyer can accept or reject suggested changes by a Collaborator. However, the event cannot be posted while collaborators are reviewing the event.

Collaborators may include customers (Cardinal users), supervisors, subject matter experts (SME), Evaluation Committee members, and others who have the Cardinal role of Event Collaborator.

For instructions on the strategic sourcing process and awarding events, refer to the course entitled **PR345: Strategic Sourcing**, located on the Cardinal website in **Course Materials** under Learning.

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#### **Event Collaboration**

#### Invite Event Collaborators (SS Buyer)

The SS Buyer selects users with the Event Collaborator role and adds them to an event that is being created. Events do not route to managers, or other users, unless they are selected as a Collaborator.

A routing sequence is established as you invite the Collaborators. You may modify the sequence to ensure the event is reviewed by the Collaborators in the order you wish.

1. The event must be open for editing in order to invite collaborators. To open the event, navigate to the **Create Events** page using the following path:

Main Menu > Sourcing > Create Events > Event Details

Favorites -	Main Mer	nu 🕶 🔷 >	Sourcing 👻	>	Create Events -	>	Event Details
Create Even	ts						
Enter any inform	nation you hav	e and click	Search. Leave	field	s blank for a list of	all v	alues.
Find an Exist	ting Value	Add a New	/ Value				
Search Cr	riteria						
Business Unit	- •	50100		Q			
Event ID	contains 🔹	150092					
Event Round	- •						
Event Version	- <b>v</b>						
Event Format	- •				Ŧ		
Event Type	- <b>v</b>				<b>v</b>		
Event Name	begins with 🔻						
Event Status	- •				▼		
Case Sensitive							
Limit the number of results to (up to 300): 300							
			-				
Search	Clear Ba	asic Search	Save Se	arch	Criteria		

- 2. Click the Find an Existing Value tab to find and open an existing event.
- 3. The Business Unit field will default, do not change this value.
- 4. Enter search criteria, such as **Event ID**, for the event.
- 5. Click the Search button.



Find an Existing Value	<u>A</u> dd a New Value	
Search Criteria		
Business Unit = •	50100 Q	
Event Round = •	1	
Event Version = •	1	
Event Format = 🔻	<b>T</b>	
Event Type = 🔻	¥	
Event Name begins with V		
Event Status = 🔹	¥	
Case Sensitive	up to 300): 300	
Search Clear Bas	sic Search 🖾 Save Search Criteria	
Search Results		
View All	First 🕢 1 of 1 🕟 La	st
Business Unit Event ID Eve	ent Round Event Version Event Format Event Type Event Name Event State	JS
50100 0000155592 1	1 Buy RFx Tree Trimming by Routes Culpeper District Open	

- 6. Select an Event with a status of Open.
- 7. The Create an Event Event Summary page displays.

Favorites   Main Menu   Sourcing   Create Events   Event De	etails						
Modify an Event							
Event Summary							
Business Unit 50100 Event ID 0000155502 Round 1	Version 1 Event Format Buy						
Event Type RFx Change to Auction							
Event Status Open	Time Zone EDT						
*Solicitation Type : IFB Sealed Contract 🔻	Preview Date 08/06/2019 🛐 Time 8:13AM						
*Event Name Tree Trimming by Routes Culpeper District	Start Date 08/13/2019 Time 10:00AM						
Description The Virginia Department of Transportation herein	End Date 08/30/2019 3 Time 8:13AM						
referred to as "VDOT" is soliciting bids from qualified firms to provide Planned. By the Route	Copy From Go						
Tree Pruning Services within the Culpeper District	Preview By: By Total						
Required fields reside on pages marked with an asterisk (*) you may not save you	ur 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							
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							

8. Click the Event Collaborators hyperlink. The Create an Event – Event Collaboration Details page displays.



Modify an Event		
Event Collaboration Details		
Collaboration Due Date		
Review By Notifications		
Never     One day before     One week bef	week before	
Review Sections (?)		
Seq Nbr     Section Name     Bid Factor Default Option       1     None     V       Process Type   Sequential     V     Section Review By Date		Û
Collaborators @	Personalize Find	First 🕢 1 of 1 🕢 Last
Seq Nbr         UserId         Name         Review By Date         Time         Delegate User ID         Name	Override Main Collaborator Reviewed	Allow RFx Document Edit
	•	
Find Collaborators Save As Group		
Add Section		
OK Cancel Refresh		

- 9. In the **Collaboration Due Date** field, enter a deadline date and time for all collaboration to end. The **Collaboration Due Date** must be <u>prior</u> to the event Preview Date.
- 10. In the Collaborators section, enter the name of the user you wish to invite to collaborate on the event. You can use the magnifying glass for the UserId field to find a user. If you have previously set up a Collaborator Group you may access the group by clicking the Find Collaborators hyperlink.
- 11. Click the Add a new row at row x icon (+) at the end of the row to add another Collaborator. Use the Delete row X icon (-) to remove a Collaborator.
- **12.** The routing sequence number (**Seq Nbr**) is automatically populated as you select the Collaborators. You may modify the sequence to ensure the event is reviewed by the Collaborators in the order you wish.

Modify an Event								
Event Collabo	Event Collaboration Details							
Collaboration Due	Date 09/3	0/2019 😈		Time 9:	03AM			
Process	Type Sec	uential		~				
🔍 Review By No	otification	15						
	۲	Never	One	e day before	One week before	C	We	
<b>Review Sections</b>	?							
Seq Nbr	Section N	lame						
1								
	Process T	ype Sequen	itial	~	Section Review By Date	Ħ		
	Collab	orators (?)						
	Seq Nbr	Userld		Name		Review By Dat	te	
	1	SPENCER.	HAL Q	Hall, Spencer (\	/DOT)	09/13/2019	Þ	
	2	ANDY.ZICK	LER 🔍	Zickler, Andrew	M., P.E. (VDOT	09/13/2019	<b>B</b>	
	Find Coll	aborators		Save As Gr	pup			
Add Section								
OK Car	ncel	Refresh						



**13.** If you wish to save the selected Collaborators as a group for future use, click the **Save As Group** hyperlink. Two new fields, **Name** and **Description**, appear in a pop-up window.

Save As Group	×
	Help
Name & Description 🕐	
Name Stone Bidders	
Description Stone Bidders	
OK Cancel Retresh	

- 14. Enter a group name in the Name field.
- **15.** Enter a brief description of your group in the **Description** field.
- 16. Once you have entered all the collaborators, click the OK button. Your group is now available for future use and the Collaborators have been added to the event. The Modify an Event Event Collaboration Details page displays.

Favorites 👻	Main Menu 👻 🚽 Sourcing 👻 🔶	Create Events	<ul> <li>Event Deta</li> </ul>	ils				
Modify an Ever	nt							
Event Sum	mary							
Busines	s Unit 50100 Event ID 000	0155502	Round 1	Version 1	Event For	mat Buy		
	2121110 000	0100082		10131011				?
Even	Type RFx	Change to A	Auction					
Event	Status Open			Time Zone	EDT			
*Solicit	ation Type : IFB Sealed Contract	٣		Preview Date	08/06/2019	Time 8:13AM	]	
*Event	Name Tree Trimming by Routes Culpep	er District		Start Date	08/13/2019	Time 10:00AM	]	
Descr	intion The Virginia Department of Trans	nortation herein	. 28	End Date	08/30/2019	Time 8:13AM		
	referred to as "VDOT" is soliciting	bids from		Copy From		¥	Go	
	Tree Pruning Services within the	Culpeper Distric	t	Preview By	By Total	<b>v</b>		
Required fields	laiono the right-of-way on the liste reside on pages marked with an aste	d routes within risk (*) you m	nav not save your	event until all rec	uired fields are fille	d.		
Stop 1: Do	fine Event Pacies							
Enter basic info	rmation, general settings and optiona	l rules for this e	event.					
	* Event Settings and Options				Payment Terms and (	Contact Info		
	Event Comments and Attachmen	ts			Event Constraints			
	Event Header Bid Factors							
Step 2: Co	nfigure Line Items							
Create line listin	gs for this event.							
	* Line Items				Item Line Defaults			
Step 3: Sel	ect Bidders to Invite							
Send out target	ed invitations to this event, designate	it as a public e	vent, or both.					
	* Bidder Invitations							
Step 4: Inv	ite Collaborators							
Invite others to	collaborate on this event. You may no	t post your eve	nt while collaborat	ors are reviewing	g it.			
	Event Collaborators							
Step 5: Pos	tEvent							
Step 3: POSt Event								
may have define	d.	oac Event to re	siease your event	ior scheduled ex	aemai viewing and	uigger any bidder	miniations	you
.,		_						
	Save Event				Save As T	emplate		
	Post				Preview	PDF		



- **17.** Click the **Save Event** button. The page looks the same but the title of the page has updated to **Modify an Event Event Summary** page. The **Event Status** is **Open**.
- 18. Click the Route button to send the event to the first collaborator. An email notification is sent to each Collaborator and an item is added to each Collaborator's worklist. The Event Status changes to Collaborating Event and the Collaboration Status is set to Available for Checkout on the Workbench. The Save Event and Route buttons are grayed out.
- **19.** As the event creator, you will receive a message when all collaboration is complete.

# **Procurement Job Aid**



#### 501 PR345: Strategic Sourcing Collaboration

#### Collaborate on an Event

The system sends an email notification to all invited collaborators on an event. The first collaborator receives a worklist entry immediately; the rest of the collaborators receive a **Worklist** entry once the current collaborator completes his or her collaboration input based on the routing sequence entered. Collaborators check out an event through the **Event Workbench**, make any changes, and then route the event to the next collaborator. Once the collaboration is done, the system notifies the event creator by email and **Worklist** entry.

As an Event Collaborator, to access the event you have multiple options:

- Click the Collaborate on this event hyperlink in the email notification you received, or
- Click the event hyperlink (i.e., Link) from your Worklist

Card	linal	Ali 👻	Search	>>> Advanced Search	1	Home Worklist A	dd to Favorites   Sign Out
Favorites • M	ain Menu 🗸 > Work	klist ♥ → Worklist					
Worklist							New Win
Worklist for JAM		150					
WORKIIST IOF JAW	IES.HALL: HALL, JAN	125	Worklist Eilfere	<b>V S s u d u</b>			
Detail View				V Eeed +			
Worklist Items					Personalize   Find   View All   🖓   🔛	First 🕚 1-2 of 2 🕑 L	ast
From	Date From	Work Item	Worked By Activity Pr	riority Link			
MASON, GEORGE	02/23/2017	Analysis Collaboration	Sourcing Analysis Collaboration	✓ 50100,0000153666,1,	3, 1, 1 Mark Worked	Reassign	

- 1. To access the event using your **Worklist**, click the **Worklist** hyperlink in the top right hand corner of the page. Your **Worklist** displays.
- 2. Under the Work Item column, the event will be listed as Checkout Event Collaboration. Click the Link column hyperlink on the row with the event you wish to collaborate on.





3. The Event Workbench page displays for the selected event.

Favorites - Main Menu - > Workli	st → Worklist						
Event Workbench							
Search Criteria							
Business Unit 50100 Q							
Event ID 0000153666	From Start Date	To Start Date	🖻 Sort With 🗸 🗸				
Created By	Q From End Date	To End Date	🔋 Sort Order 🗸 🗸				
Event Format	Category		Only show Events I created				
Event Type 🗸 🗸	Item ID		Only show Active Events				
Event Status	✓ Description		Use my search defaults				
Associated With Q	Plan Name		Q Default Search Professors				
Plan			Creatil Search Presences				
Legend							
Collaboration Help In order to collaborate on this Event y	you must check out the Event first.	To check out the Event click the Collaboration	Available button				
If the Event is already checked out by Checked Out icon 6.	y another collaborator or the collab	oration due date has passed you will see the C	ollaboration				
- If you want to view the collaboration before checking it out click the View Collaboration button							
<ul> <li>If the Event is currently checked out a button the.</li> </ul>	and you would like to be notified w	hen it has been checked back in, click the Notif	y Me on Check In				
Search Results	_		Find   View All First ④ 1 of 1 ④ Last				
Event ID Name For	mat Type Unit	Status					
0000153666 Collaboration Test Buy	RFx 50100	Collaborating Event 📀	11 fa 11 🐨				

- 4. On the Event Workbench page, depending on the stage of the event, the collaboration countdown time displays in the Status field.
- **5.** To collaborate on the event, click the Collaboration Available (Available for checkout) button. The Modify an Event Event Summary page displays.



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							
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	s a public event, or both.							
* Bidder Invitations								
Step 4: Invite Collaborators Invite others to collaborate on this event. You may not po	st your event while collaborators are reviewing it.							
Event Collaborators	View Collaboration							
Step 5: Post Event When all event creation activities are complete, click Pos you may have defined.	t Event to release your event for scheduled external viewing and trigger any bidder invitations							
Save Event	Save As Template							
Boute	Proview PDF							
Roue	T TOYIGW T DI							
Related Links:								
Document Status Inquiry	View All Attachments for Event							
Collaboration Status: Checked Out Checked Out By: HALL, JAMES Checked Out On: 02/22/2017 05:36 PM EDT Last Updated By: MASON,GEORGE	Plan Task Associations							

- 6. On the **Modify an Event Event Summary** page you see that the **Collaboration Status** is **Checked Out** along with details about the checkout, such as when and by whom.
- 7. To make edits or add comments, click the Event Comments and Attachments hyperlink under Step 1.



Favorites -	Main Menu 🛩	> Worklist 🕶 >	Worldist	>	Event Collaboration			
Modify an Eve	ent							
Event Con	ments and Att	achments						
Event ID	0000153666							
Enter Commer	its 🕐					View All	First 🕚 1 of	1 🕑 Last
Comments:								+ -
The event is	well prepared and is ap	proved to proceed	with an adve	ntisen	nent CJP 02/22/17			ø
				_				
Send To	Bidder 🗆	Include On Award					Standard Comn	nents
Add Attact	iment							
ОК	Cancel Refrest							

- 8. Enter your comments in the **Comments** box.
- 9. Click the OK button. The Modify an Event Event Summary page displays.

Modify an Event					
Event Summary	,				
Business Unit	50100 Event ID 0000153666	Round 1	Version 1	Event Format Bu	/ @
Event Type	RFx				
Event Status	Collaborating Event		Time Zone ED	т	
*Solicitation 1	ype: IFB Sealed Contract	~	Preview Date 06/0	01/2017 🛐 Time	11:14AM
*Event Name	Collaboration Test		Start Date 07/0	03/2017 🛐 Time	11:14AM
Description	I. PUPROSE:	Þ	End Date 08/3	31/2017 🛐 Time	11:14AM
	The Virginia Dept of Transportation (herei	n referred to	Copy From		✓ Go
			Preview By:	By Line 🗸	
Required fields reside	e on pages marked with an asterisk (*)	you may not save y	our event until all requ	ired fields are filled.	
Sten 1: Define	Event Basics				
Enter basic information	on, general settings and optional rules f	or this event.			
	* Event Settings and Options		Рауг	ment Terms and Contact	Info
	Event Comments and Attachments		Ever	nt Constraints	
	Event Header Bid Factors				
Step 2: Config	ure Line Items				
Create line listings for	this event.				
	* Line Items		Item	Line Defaults	

**10.** To modify event lines, click the **Line Items** hyperlink under **Step 2**. The **Modify an Event – Line Items** page displays.



-				_								
Favori	es 🕶	Main Menu	t  → Worklist  → Event Collaborati	n								
Modif	y an Ever	nt										
Line	Items											
	Business	s Unit 50100 Event ID	000153666 Round 1 Version 1		Event Form	at Buy	Event Ty	pe RFx				
Your e	vent may o	consist of items from your item ca	talog and, optionally, ad-hoc items. You ca	n cre	ate the event lines	manually, o	r by copying lines (	rom an existing e	vent or template, or o	ther allowed tra	insaction types.	
		Copy From	♥ Go						Fittered View All Li	nes and Groups	· ·	
Line	Items @							Darsonalize	a   Eind   Maw All I	51 💷 n	nt (1) 1.2 m2 (1	Leet
Bas	c Definitic	on Advanced Definition						rersonanzo	e l'rais l'aica sa l'a	- 1 <b>ma</b> 1 1	DI O P2012 0	Last
0.00	o penner	and protocology between 1										
	ine	Item ID	Description		Category	"UOM	*Qty 1	tart Price	Ext. Amount	Weighting		
	I	0607455000 C	MISC. PARTS		0607455	EA	1.0000	26536.0600	\$26,536.06		0.00000	± =
	!	0607455000 C	LABOR		0607455	EA	35.6270	83.0000	\$2,957.04		0.00000	± =
Event	Total: 294	193.1010 USD		-		-			Line Weighti	ng Total: 100 %	6 Remaining We	ight: 0%
Groun Selected Lines												
< Return to Event Overview GoTo Go						Go						
	Save Event Channes											
	ours Eren	in sinarges										

- 11. You may update the Qty field (i.e., line quantity) for each line if needed.
- **12.** After you have made the line edits, click the **Save Event Changes** button.
- **13.** Click the Return to Event Overview hyperlink. The Modify an Event Event Summary page displays.

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 Constraints				
Event Header Bid Factors					
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	e collaborators are reviewing it.				
Event Collaborators	View Collaboration				
Step 5: Post Event					
When all event creation activities are complete, click Post Event to release you may have defined.	your event for scheduled external viewing and trigger any bidder invitations				
Save Event	Save As Template				
Route	Preview PDE				
Route	Preview PDF				

**14.** Click the **Route** button to send the event to the next Collaborator. This routing is based on the routing sequence the event creator previously defined. A routing confirmation message displays.



Message					
Routing Collaboration Event to next Collaborator will check-in the event. Do you wish to proceed? (18058,199)					
If you have not finished reviewing the event, select "No", otherwise select "Yes".					
Yes No					

**15.** To check in the event and send it to the next Collaborator, click the **Yes** button. The **Modify an Event – Event Summary** page displays.

Step 4: Invite Collaborators Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.					
Event Collaborators	View Collaboration				
Step 5: Post Event When all event creation activities are complete, click Post Even you may have defined.	nt to release your event for scheduled external viewing and trigger any bidder invitations				
Save Event Route	Save As Template Preview PDF				
Related Links:					
Collaboration Status: Available Last Updated By: HALL, JAMES         Return to Search       C Refresh	View All Attachments for Event Plan Task Associations				

- **16.** The event's Collaboration Status updates to Available.
- **17.** Click the **View Collaboration** hyperlink to see any collaboration changes and comments.



Favorites - Main Menu	$\bullet$ > Worldist $\bullet$ > Worldist	> Event Collaboration			
Paview Event Colleboration					
Neview Event Goliai	boration				
Business Unit 50	100 Event ID 000	00153666	Round 1	Version 1	
Event Name Co Eve Invit	Ilaboration Test It Header Eve Ied Bidders Con	F nt Lines straints	ormat Buy Bid Factors Comments and Attact	Type RFx	
Filter By					
Event Line				Find   View All First 🚯 1 of 1 🛞 Last	
Line Nbr 1	Item ID 0607455000	Description M	SC. PARTS		
Line Summary			Personalize	Find   View All   💷   🔜 🛛 First 🕚 1-2 of 2 🕑 Last	
Collaboration Input Co	omments m				
Field	Name	Date/Time	Action	Value	
Oty	Original	02/22/2017 6:20:37PM	Update	1	
Qty	HALL, JAMES	02/22/2017 6:20:37PM	Update	2	
Line Details			Personaliz	ze   Find   View All   💷   🔜 🛛 First 🛞 1 of 1 🛞 Last	
Collaboration Input Co	omments m				
Field	Name	Date/Time	Action	Value	
Return to Search C Refresh					

**18.** Click the **Event Lines** hyperlink to view the original amount and any changes to the quantity by Collaborators.



Review Event Co	ollaboration						
Business Uni	it 50100	Event ID 0000153666	Round 1		Ve	rsion 1	
Event Nam	e Collaboration Test		Format Buy			Type RFx	
	Event Header	Event Lines	Bid F	actors			
	Invited Bidders	Constraints	Com	ments and A	Attachments		
Filter B	У						
Event Comments an	d Attachments			Perso	onalize   Find   View All	🖉   🔜	First 🕙 1 of 1 🕑 Last
Collaboration Input	Comments						
Field	Name	Date/Time	Action	Value			
Comments	HALL, JAMES	02/22/2017 6:20:36PM	Add	The event to proceet 02/22/17	t is well prepared and is a d with an advertisement.	approved - CJP	P
Event Line					Fi	nd   View All	First 🕚 1 of 1 🛞 Last
Line Nbr	Item ID	Descri	ption				
Comments and Atta	achments			Pers	onalize   Find   View All	🖉   🔣	First 🕚 1 of 1 🛞 Last
Collaboration Input	Comments						
Field	Name	Date/Time	Action		Value		
< Return to Event Overvie	BW						
Return to Search	C Refresh						

- **19.** Click the Event **Comments and Attachments** hyperlink to view any comments by Collaborators.
- **20.** Once all Collaborators have completed their review, an email notification and a worklist item are sent to the SS Buyer (i.e., event creator) indicating that collaboration has been completed by all Collaborators.



#### **Review Event Collaboration (SS Buyer)**

To review collaboration on an event, the SS Buyer has multiple options:

- Click the **Review the completed collaboration** hyperlink in the email notification you received, or
- Click the event hyperlink (i.e., Link) from your Worklist

Card	dinal	All 👻	Search	>>> Advanced Search	Н	ome Worklist A	dd to Favorites   Sign Out	
Favorites • M	ain Menu 🗸 > Workl	ist ♥ → Worklist						
Market							New Win	
VVORKIIST								
Worklist for JAN	ES.HALL: HALL, JAM	ES						
Detail View	Detail View Worklist Filters Seed ~							
Worklist Itoms					Percentize   Find   May All   2	First @ 1.9 of 9 0	art	
From	Date From	Work Item	Worked By Activity Prid	urity Link	reportance I ring I view All I and I ma	Filas - 1-2012 - L		
MASON, GEORGE	02/23/2017	Analysis Collaboration	Sourcing Analysis Collaboration	✓ 50100,0000153666,1,3,1,	1 Mark Worked	Reassign		

- 1. To access the event using your **Worklist**, from any Cardinal page, click the **Worklist** hyperlink in the top right hand corner of the page. Your **Worklist** displays.
- Under the Work Item column, the event will be listed as Review Collaboration. Click the Link column hyperlink on the row with the event that has the collaboration you wish to review. The Review Event Collaboration page displays for the selected event.

Favorites -	Main Menu - Sourci	ng 🗸 > Maintain Events 🗸	> Event Workbe	nch > Event Det	alls	
Review Eve	ent Collaboration					
Busin	ess Unit 50100	Event ID 0000153666	Rou	nd 1	Version 1	
Event Name Collaboration Test Event Header Invited Bidders		Event Lines Constraints	Format Buy Event Lines Bid Factors Constraints Comments and Attachments		Type RFx	
Event Line	Filter By	~			Find   View All	First ④ 1 of 1 ④ Last
Line Nbr 1	Item ID 0607-	455000	Description MISC.	PARTS		
Line Summa	Ŋ			Personali	ze   Find   View All   🖉   🔜	First 🕚 1-2 of 2 🕑 Last
Collaboration	Input Comments					
Field	Name	Date/Time	Action	Value	Update	*Update Action
Qty	Original	02/22/2017 6:20:37PM	Update	1		Accept
Qty	HALL, JAMES	02/22/2017 6:20:37PM	Update	2		Reject V
Line Details				Person	alize   Find   View All   💷   💷	First ④ 1 of 1 ④ Last
Collaboration	Input Comments					
Field	Name	Date/Time	Action	Value	Update	*Update Action
						Reject
Update E	vent					

3. Click the **Event Lines** hyperlink to view the edits and/or comments entered by each collaborator.





Equaritan Ma	in Llonu Couroi	ing - > Mointain Events - >	Euget Worlds	anah a Duant Dataila		
Favorites - Ma	iin Menu -> Sourci	ing  Vitaintain Events	<ul> <li>Event workb</li> </ul>	ench > Event Details		
Review Event	Collaboration					
Business I	Unit 50100	Event ID 0000153666	Ro	und 1	Version 1	
Event Na	ame Collaboration Test		For	mat Buy	Type RFx	
	Event Header	Event Lines		Bid Factors		
	Invited Bidders	Constraints		Comments and Attachments		
Filtor	By	÷				
Event Line					Find   View All	First 🕚 1 of 1 🕑 Last
					-	
Line Nbr 1	Item ID 0607	455000 De	escription MISC	2. PARTS		
Line Summary				Personalize   Find   Vie	w Ali   🖓   🔣	First 🕚 1-2 of 2 🕑 Last
Collaboration Inpu	ut Comments (TTT)					
Field	Name	Date/Time	Action	Value	Update	Allodate Action
		outor mile	reach	- and -	opour	opone recon
Qty	Original	02/22/2017 6:20:37PM	Update	1		Accept
Qty	HALL, JAMES	02/22/2017 6:20:37PM	Update	2	•	Accept 🗸
Line Details				Personalize   Find   \	/iew All   💷   🔛	First 🕚 1 of 1 🕑 Last
Collaboration Inpu	ut Comments .					
Field	Name	Date/Time	Action	Value	Update	*Update Action
						Reject
Update Event						
< Return to Event Overview						
Add D Linciate/Diselan						
Return to Search	No realesti					2 opulater Display

- 4. Review and accept or reject Collaborator edits for each **Event Line**. Use the **Show next row** and **Show previous row** icons (i.e., left and right arrows) to scroll through the lines.
- 5. To accept or reject a change, check the **Update** box and change the **Update Action** field to **Accept** or **Reject** in both the **Line Summary** and **Line Details** sections.
- 6. Click the Comments tab.





Favorites - Main I	Menu + > Sourcing +	> Maintain Events + >	Event Workbench	> Event Details		
Review Event Co	ollaboration					
Business Uni	t 50100 I	Event ID 0000153666	Round	1	Version 1	
Event Name	e Collaboration Test		Format	Buy	Type RFx	
	Event Header	Event Lines		Bid Factors		
Filter B	Invited Bidders	Constraints		Comments and Attachments		
Event Line	·	•			Find   View All	First 🕙 1 of 1 🕑 Last
Line Nbr 1	Item ID 0607455000	De	scription MISC. P	ARTS		
Line Summary				Personalize   Find   View	AII   🖓   🔜	First 🕚 1-2 of 2 🕑 Last
Collaboration Input	Comments					
Comments						
I accept the revised qua	ntity	ą.				
		Q				
Line Details				Personalize   Find   Vie	w Ali   💷   🔣	First 🕚 1 of 1 🕑 Last
Collaboration Input	Comments (TTT)					
Field	Name	Date/Time	Action	Value	Update	*Update Action
						Reject
Update Event						
< Return to Event Overvie	w					
Return to Search	C Refresh					Add 🖉 Update/Display

- 7. Enter comments as applicable.
- 8. Repeat the previous steps for each Event Line.
- 9. Once all collaboration has been either accepted or rejected, and comments added, click the **Update Event** button. The **Review Event Collaboration** page displays.

Step 5: Post Event When all event creation activities are complete, click Post Event to release you you may have defined.	ur event for scheduled external viewing and trigger any bidder invitations							
Save Event	Save As Template							
Post	Preview PDF							
Related Links:	Related Links:							
Document Status Inquiry	View All Attachments for Event							
Plan Task Associations								
Collaboration Update process has completed. The event has been updated according to the chosen collaboration input. Please review event to ensure updates are acceptable.								
Return to Search 2 Refresh	📑 Add 🖉 Update/Display							

- 10. The event is saved and the status changes to Collaboration Update process has completed.
- 11. Click the Save Event button.



Step 4: Invite Collaborators	
Invite others to collaborate on this event. You may not	post your event while collaborators are reviewing it.
Event Collaborators	View Collaboration
Step 5: Post Event	
When all event creation activities are complete, click P you may have defined.	ost Event to release your event for scheduled external viewing and trigger any bidder invitations
Save Event	Save As Template
Post	Preview PDF
Related Links:	
Document Status Inquiry	View All Attachments for Event Plan Task Associations
Collaboration Status: Available Last Updated By: MASON, GEORGE	
Return to Search 27 Refresh	📑 Add 🖉 Update/Display

- 12. The Collaboration Status updates to Available.
- **13.** To review the changes made to the event, click the **View Collaboration** hyperlink. The **Review Event Collaboration** page displays.

Lvent Wane		631		ECHICIAN ESTIV		Type REV	
L	Event Header Invited Bidders	Even Cons	it Lines straints	Bid Factors Comments and	d Attachments	Type Tux	
Filter By	1	~		No.12			
Event Comments and	I Attachments			Per	sonalize   Find   Vie	w All   💷   🔣	First 🕙 1 of 1 🕑 Last
Collaboration Input	Comments	<b></b> )					
Field Nan	ne	Date/Time	Action	Value		Update	*Update Action
Comments HA	LL, JAMES	02/22/2017 6:20:36PM	Add	The event is well prepared an approved to proceed with an advertisement CJP 02/22/1	nd is 7		Reject
Event Line						Find   View All	First 🕚 1 of 1 🕑 La
Comments and Atta	Item ID		De	scription	reonalize   Find   Via	ων ΔΙΙ Ι 🗔 Ι 🛄	Firet (1) 1 of 1 (1) Lad
Collaboration Input	Comments			re	ISOIIdiize   Filld   Vie		
Field Name	Date	/ /Time #	Action	Value		Update *U	pdate Action
					<b>B</b>	□ Re	eject

- 14. By clicking one of the hyperlinks at the top of the page (i.e., **Event Header**, **Event Lines**, **Bid Factors**, or **Comments and Attachments**) you can review the specific changes.
- 15. The collaboration actions display with the action taken in the **Update Action** field.
- **16.** The event can be posted for advertisement following the normal strategic sourcing process.



#### **Bid Analysis Collaboration**

#### Invite Collaborators for Bid Analysis (SS Buyer)

Once an even'ts End Date has passed and all the bids have been uploaded from eVA, the **Analyze Event** pages become available. The SS Buyer analyzes the responses and may invite Collaborators for approvals or comments, prior to making the award using the **Invite Collaborators** page. The SS Buyer may invite Collaborators, such as Customers (users) for comments, a manager for approval, or RFP Evaluation Committee members for scoring.

1. As the SS Buyer you can invite Collaborators to take part in the bid analysis. Navigate to the **Event Workbench** page using the following path:

Favorites -	Main Menu 👻	$\rightarrow$ Sourcing $\Rightarrow$ $\rightarrow$	Maintain Events $\star \rightarrow$	Event Workbench					
Event Work	kbench								
Search Cri	iteria								
Business l	Unit 🔤 🔍								
Even	t ID 0000155541		From Start Date	E	To Start Date	Ħ	Sort With	<b>`</b>	2
Created	By	Q	From End Date	ii)	To End Date	ji ji	Sort Order	<b>`</b>	2
Event For	mat	~	Category				Only show Ev	ents I created	
Event T	уре	~	Item ID				Only show Ac	tive Events	
Event Sta	itus	~	Description				Search	defaults	
Associated W	Vith (	2	Plan Name			্	Default Search Pre	ferences	
Legend									
Search Results							Find   View All	First 🕚 1 of 1 🕑 L	.ast
Event ID	Name	Format	Type Unit	Status				-	
▶ 0000155541	Snow Removal Cul	pe Buy	RFx 50100	Event Completed		8		距	

Main Menu > Sourcing > Maintain Events > Event Workbench

- 2. Search for the event using any combination of search criteria. Click the Search button.
- Find the event in the search results and click the Analyze Bids icon to analyze the event. The Analyze Bids option will not be available if the event Status is Open. The Analyze Total page will display.



Analyze Total							
Analyze Total	Analyze Line						
Business Unit:	Event ID:	Round:	Version:	Event N	ame:		
50100	0000153666	1	3	Collabo	ration Test		
Event Format:	Event Type:	Currency:	End Date:	Status:			
Buy	RFx	USD	02/16/2017 11:14/	AM EST Pending	g Award	Analyze Export	
Bid Analysis and	Display Options (	?)				Associate Planning Task	
Analysis						Award Events Create New Round	
	Bio	der Name Carte	r Machinery Company	George Maker		Document Status Inquiry	
		Inc				Inv te Collaborators	
	Event Version Res	ponded To 2		2		Review Optimization	
	В	id Number 1		1			
	Total B	id Amount 75,34	14.05	68,275.24			
	l ota	al Bid Cost 0.00		0.00			
	Total E	vent Score 0.00		0.00			
	Total Hea	ader Score 0.00		0.00			
		Bid Action NA	~	NA 🗸			
	Reje	ect Reason	Q	Q			
	Award	by Percent					
		Hide Bid					
Recalculate	Add / Edit F	actors	Unhide Bids		<< <	> >>	
Retur	n to Search Line						

**4.** In the Go To drop-down menu, click Invite Collaborators. The Event Collaboration Details page displays.

**Note**: Collaborators may have previously reviewed and scored bid responses outside of Cardinal. Each Collaborator enters their scores into Cardinal for calculation.



Event Collaboration Details				
Bid Analysis Review Sections				
Collaboration Due Date 02/28/2017 🛐 Time 4:37PM				
Process Type Sequential Show Bidders Name				
Review By Notifications				
Review Sections (2)				
Seq Nbr Section Name	ate 02/28/2017 🕞 Time 4:37PM			
		Personalize	Find   🖙   🌆 First 🖤 1-2 of 2 🕚	C Last
Seq Nbr Userld Name	Review By Date Time Delegate User ID Name	Collaborator	Reviewed Reviewed	
1 JAMES.HALL Q HALL, JAMES	02/28/2017 🚺 4:37PM			+ -
2 A.HETZER Q Hetzer, Andy (VDOT)	02/28/2017 🕅 4:37PM 🔍 🔍			+ -
Find Collaborators				
Add Section				
Route To				

- 5. In the Collaboration Due Date field, enter a deadline date and time for all collaboration to end.
- 6. Clear all existing names in the Collaborators UserId field.
- 7. In the Collaborator UserId field, enter the name of the user you wish to invite to collaborate on the event. You can use the magnifying glass Look up Collaborator UserId icon, if needed, to find a user. If you have previously set up a Collaborator Group, you may access the group by clicking the Find Collaborators hyperlink.
- Click the Add a new row at row x icon (+) at the end of the row to add another Collaborator. Use the Delete row X icon (-) to remove a Collaborator.
- **9.** The routing sequence number (**Seq Nbr**) is automatically populated as you select the Collaborators. You may modify the sequence to ensure the event is reviewed by the Collaborators in the order you wish.
- **10.** Once all the collaborators have been entered, click the **Route To** button. (This step is different from when you invited collaborators previously.) A routing confirmation message appears.

Message
The event will be saved and routed to the collaborators making it read-only until the due date. (18058,583)

**11.** The routing message notifies you that the event will be read-only until the collaboration due date. Click the **OK** button. The **Analyze Total** page displays.



Favorites -	Main Menu 🕶 🔷 >	Sourcing + >	Maintain Events 🕶	> Event We	orkbench > Ana	lyze Events	1		
Analyze Tot	tal								
Analyze Total	Analyze Line								
Business Unit:	Event ID:	Round:	Version:		Event Name:				
50100	0000153666	1	3		Collaboration Test				
Event Format:	Event Type:	Currency:	End Date:		Status:		Go To:		
Buy	RFx	USD	02/16/2017 11:1	4AM EST	Collaborating Bid A	nalysis			~
Bid Analysis a	and Display Options	?)							
Analysis									
	Bi	dder Name Carte	r Machinery Compa	ny George Ma	ker				
		Inc		2					
	Event Version Res	ponded To 2		2					
	E	id Number 1		1					
	Total B	id Amount 75,3	44.05	68,275.24					
	Total E	an Bid Cost 0.00		0.00					
	Total H	eader Cost 0.00		0.00					
	Total He	ader Score 0.00		0.00					
-		Bid Action NA	~	NA	~				
	Rej	ect Reason	Q		Q				
	Award	by Percent							
		Hide Bid							
Recalculate	Add / Edit F	actors	Unhide Bids		<<	<	>	>>	
Save 🔯 Re	eturn to Search								
Analyze Total   Anal	yze Line								

- **12.** The event is read only for non-collaborators until the due date, and has been routed for collaboration. An email notification is sent to each Collaborator and an item is added to each Collaborator's worklist.
- **13.** Collaborators may score the event at any time, prior to the due date.



#### **Collaborate on Bid Analysis**

An email notification is sent to each Collaborator and an item is added to each Collaborator's worklist indicating that collaboration is needed. As an **Event Collaborator**, to access the event you have multiple options:

- Click the Collaborate on this event hyperlink in the email notification you received, or
- Click the event hyperlink (i.e., Link) from your Worklist

Card	dinal	All 👻	Search	>> Advanced Search	Ho	ome Worklist Add	to Favorites   Sign Out
Favorites - M	lain Menu 🗸 > Workl	list → Worklist					
Marklint							New Wind
WORKIISU							
Worklist for JAM	IES.HALL: HALL, JAM	ES					
Detail View			Worklist Filters	✓ 🖾 Feed -			
Worklist Items				Per	sonalize   Find   View All   💷   🔜	First 🕚 1-2 of 2 🕑 Last	
From	Date From	Work Item	Worked By Activity Pri	ority Link			
MASON, GEORGE	02/23/2017	Analysis Collaboration	Sourcing Analysis Collaboration	✓ 50100,00001535555,1,3,1,1	Mark Worked	Reassign	

- 1. To access the event using your **Worklist**, from any Cardinal page, click the **Worklist** hyperlink in the top right hand corner of the page. Your **Worklist** displays.
- 2. Under the Work Item column, the event will be listed as Analysis Collaboration. Click the Link column hyperlink on the row with the event that has the collaboration you wish to review. The Event Workbench displays.

Favorites - Main Menu - >	Worklist 👻 🔿	Worklist		
Event Workbench				
Business Unit 50100 Q				
Event ID 0000153666		From Start Date	To Start Date	🗊 Sort With 🗸
Created By	Q	From End Date	To End Date	🗟 Sort Order 🗸 🗸
Event Format 🗸 🗸		Category		Only show Events I created
Event Type 💙		Item ID		Only show Active Events
Event Status	~	Description		Use my search defaults
Associated With Q Plan		Plan Name		Default Search Preferences
Legend				
Search Results				Find   View All First 🕚 1 of 1 🕑 Last
Event ID Name	Format	Type Unit	Status	
0000153666 Collaboration Test	Buy	RFx 50100	Collaborating Bid Analysis	S the second sec

3. Click the Collaboration Available (Available for checkout) icon. The Analyze Total page displays.



Favorites -	Main Menu 🗸 🔷 🗧 🗧	Sourcing - >	Maintain Events 🕶	> Event Wo	rkbench > Analy:	ze Events	)		
Analyze 7	Fotal								
Analyze Total	Analyze Line								
, Business Unit	: Event ID:	Round:	Version:		Event Name:				
50100	0000153666	1	3		Collaboration Test				
Event Format:	Event Type:	Currency:	End Date:		Status:		Go To:		
Buy	RFx	USD	02/16/2017 11:1	4AM EST	Collaborating Bid Ana	alysis		~	
Bid Analys	is and Display Options	?							
Analysis									
	Bi	dder Name Carte	Machinery Compar	ny George Mal	er				
		Inc							
	Event Version Res	ponded To 2		2					
	Tetel	Sid Number 1	4.05	69 275 24	1				
	Total	al Bid Cost 0.00	4.05	0.00	1				
	Total E	vent Score 0.00		0.00					
	Total H	eader Cost 0.00		0.00					
	Total He	ader Score 0.00		0.00					
		Rid Antion NA		ΜΔ	<u> </u>				
	Rei	ect Reason							
	Award	by Percent	~		<b>~</b>				
	Allulu	Hide Bid							
Recalcula	Add / Edit I	actors	Unhide Bids		<<	<	>	>>	
				9					
🖪 Save 🔯	Return to Search								
Analyze Total   A	Analyze Line								

- 4. Review the Total Bid Amount and bid factors. If applicable, text bid factors would be scored here.
- 5. Click the Analyze Line hyperlink in the top left part of the page. The Analyze Line page displays.

Favorite	es 🕶	Ma	in Menu 🗸 🔹 >	Worklist 🗸 🖒	Workli	ist >	Event Collabora	tion > Anal	sis Collaborati	on				
+	Ś													
Anal	İyze L	ine												
Analyz	e Total		Analyze Line											
Busine	ess Unit:		Event ID:	Round:	Ve	rsion:		Event Name						
50100			0000153666	1	3			Collaboratio	n Test					
Event F	Format:		Event Type:	Currency:	En	nd Date:		Status:		Go To:				
Buy			RFx	USD	0	2/16/2017	11:14AM EST	Collaboratin	g Bid Analysis			~		
Line I	ltems 👔	2								Pers	sonalize   Find   Vie	w All   🖓   🔣	First 🕙 1-3	2 of 2 🕑 Last
Line	Item ID	)	Description			Category	иом	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze	
	1 06074	55000	MISC. PARTS		P	0607455	EA	26,536.06000	2.0000	0.0000	0.00000	Open 🗸	Analyze	
	2 06074	55000	LABOR		P	0607455	EA	83.00000	35.6270	0.0000	0.00000	Open 🗸	Analyze	
Analyze <sup>-</sup>	Return to Search whatyze Total   Analyze Line													



6. To analyze responses by line, click the **Analyze** bids hyperlink on each line in the **Line Items** section. A different **Analyze Line** page displays.

Favorites - Main	Menu - > W	orklist 🗸 > W	orklist > Event Collaborat	ion > Analysis Collaboration			
				,,			
Anolyza Lina							
Analyze Line							
Business Unit:	Event ID:	Round:	Version:	Event Name:			
50100	0000153666	1	3	Collaboration Test			
Event Format:	Event Type:	Currency:	End Date:	Status:			
виу	RFX	USD	02/16/2017 11:14AM EST	Collaborating Bid Analysis			
Line 1		Reque	sted Quantity 2.0000	UOM EA	Start Price 2653	36.06000	
Item ID 06074550	000	Item Descriptio	n: MISC. PARTS		Weighting	Previous Line	Next Line
Bid Analysis and Di	isplay Options						
Analysis							
	Event Versi	on 2	2				
	Bid Numb	er 1	1 2 0000				
	Bid Quant	ity 2.0000	2.0000				
"	Total Bid Co	st 0.00	0.0000				
	Total Line Sco	ore 100.0000	0.0000				
	Bid Actio	n NA	NA 🗸				
	Award by Percer	10					
	Award by Fercer						
	Award Quantit	у					
	Hide B						
<ul> <li>Factors</li> </ul>							
Weighting UOM	Ideal						
What is your bid price?	,						
100.00000	0	32000.00	35000.00				
Recalculate	Unhide Bids	1		<< <		Go To Line	
recording	onnac Dius	J					~

- 7. Review the line bid price information.
- 8. Click the OK button. The original Analyze Line page displays.

Analy	Analyze Line												
Analyze Total Al Business Unit: E		Analyze Line	Round:	rsion:		Event Name							
50100 0000153666 1			3			Collaboration	Collaboration Test						
Event F	ormat:	Event Type:	Currency:	End Date:			Status:	Status: G					
Buy		RFx	USD	02	2/16/2017 11:14A	M EST	Collaborating	g Bid Analysis					
Line Ite	ems 🕐								Pers	onalize   Find   Vie	w All   🖓   🔣	First 🕚 1-2 of 2 🕑 Last	
Line	Item ID	Description			Category	иом	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze	
1	1 0607455000	MISC. PARTS		R	0607455	EA	26,536.06000	2.0000	0.0000	0.00000	Open 🗸	Analyze	
2 0607455000 LABOR					0607455	EA	83.00000	35.6270	0.0000	0.00000	Open 🗸	Analyze	
Image: Save       Image: Save         Analyze       Total   Analyze Line													

**9.** To enter comments on a bid response item, click the **Item Description** icon. Comments entered on the **Item Description** are carried over to events that are copied from this event. Therefore you should <u>not</u> use the copy functionality on events with comments added using **Item Description**.



# **Procurement Job Aid**

### 501 PR345: Strategic Sourcing Collaboration

Item Description	×
	Help
Iten Description	
Line: MISC. PARTS is authorized to move forward with negotiation.	
189 characters remaining	
Preferred Language Item Descr	
MISC PARTS	
OK ancel	_

- **10.** Enter a comment in the **Item Description** box.
- 11. Click the OK button. The Analyze Total page displays.

Favorites -	Main Menu 🗸 💦 >	Worklist -> V	Vorklist > Ana	alysis Collabor	ation				
Analyze Tot									
Analyze Total	Analyze Line								
Analyze Total	Analyze Line	Davida	Manalana		Friend Manual				
50100	0000153666	1	3		Collaboration Test				
Event Format:	Event Type:	Currency:	End Date:		Status:	Go To:			
Buy	RFx	USD	02/16/2017 11:	14AM EST	Collaborating Bid Analysis		```	2	
Bid Analysis a	and Display Options	<b>?</b>							
Analysis									
	Event Version Res	sponded To 2		2					
	E	Bid Number 1		1					
	Tot	al Bid Cost 0.00		0.00					
	Total E	event Score 0.00		100.00					
	Total He	ader Score 0.00		0.00					
Bid Action NA V Reject Reason									
		Hide Bid							
Recalculate	Analysis C	omplete	Unhide Bids		<< <	>	>>		
Analyze Total   Anal	eturn to Search								

**12.** After you have reviewed all of the event responses and entered comments, click the **Analysis Complete** button. A confirmation message displays.





- **13.** Click the **OK** button to confirm that you do not wish to make further edits and to complete collaboration.
- **14.** An email notification and worklist item are added to the SS Buyer **Worklist** indicating that collaboration has been completed by all Collaborators.

#### **Review Bid Analysis Collaboration (SS Buyer)**

To review collaborator input on the bid responses, the SS Buyer has multiple options:

- Click the Event Analysis Collaboration hyperlink in the email notification you received, or
- Click the event hyperlink (i.e., Link) from your Worklist

Card	linal	All 👻	Search	>	Advanced Search	1	Home Worklist	Add to Favorites	Sign Out
Favorites - M	ain Menu 🗸 > Work	dist 🕶 > Worklist							
Monthlink									New Wind
vvorklist									
Worklist for JAM	ES.HALL: HALL, JAN	IES							
Detail View			Worklist Filters		V 🖾 Feed -				
Worklist Items					Persor	nalize   Find   View All   🖓   🔛	First 🕙 1-2 of 2	Last	
From	Date From	Work Item	Worked By Activity	Priority	Link				
MASON, GEORGE	02/23/2017	Analysis Collaboration	Sourcing Analysis Collaboration		✓ 50100, 0000153666, 1, 3, 1, 1	Mark Worked	Reassign		

- 1. Using your **Worklist**, from any Cardinal page, click the **Worklist** hyperlink in the top right hand corner of the page. Your **Worklist** displays.
- 2. Under the Work Item column, the event will be listed as Analysis Collaboration. Click the Link column hyperlink on the row with the event that has the collaboration you wish to review. The Analyze Total page displays for the selected event.



Favorites -	Main Menu 🕶 >	Sourcing ->	Maintain Events 🗸 >	Event Workbench > Analyze Ev	vents					
		5		,,						
Analyze Tot Analyze Total Business Unit: 50100	Analyze Line Event ID: 0000153666	Round: 1	Version: 3	Event Name: Collaboration Test						
Event Format:	Event Type:	Currency:	End Date:	Status:						
Buy Bid Analysis a	RFx and Display Options	USD	02/16/2017 11:14A	M EST Collaborating Bid Analysis	· · · · · · · · · · · · · · · · · · ·					
	ind Display Options									
Analysis										
	Bi	dder Name Carte	r Machinery Company	George Maker						
	Event Version Dec	Inc		2						
	Event version Res	ponded to 2		1						
	Total D	d Amount 75.2	14.05	69 775 74						
	Total	al Bid Cost 0.00	14.05	0.00						
	Total E	vent Score 0.00		0.00						
	Total H	eader Cost 0.00		0.00						
	Total He	ader Score 0.00		0.00						
	Rej Award	Bid Action NA ect Reason by Percent Hide Bid	<b>∨</b> Q							
Recalculate	Add / Edit I	actors	Unhide Bids							
Analyze Total   Analy	yze Line									

3. Click the Analyze Line hyperlink. The Analyze Line page displays.



Favorit	Favorites   Main Menu   → Worklist   Worklist   Event Collaboration   Analysis Collaboration											
Ana	lyze Line											
Analyz	Analyze Total Analyze Line											
Busine	ess Unit:	Event ID:	Round:	Version:			Event Name:					
50100	50100 0000153666 1			3			Collaboratio	n Test				
Event	Event Format: Event Type: Currency:			End Date:			Status:	Status: Go To:				
Buy		RFx	USD	02/16/2017 11:14AM EST Collaborating Bid Analy			g Bid Analysis	🗸				
Line	ltems 🕐								Pers	onalize   Find   Vie	w Ali   🖓   🔣	First 🕚 1-2 of 2 🕑 Last
Line	Item ID	Description		с	ategory	иом	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
	1 0607455000	MISC. PARTS		📑 0	607455	EA	26,536.06000	2.0000	0.0000	0.00000	Open 🗸	Analyze
	2 0607455000	LABOR		Pa 0	607455	EA	83.00000	35.6270	0.0000	0.00000	Open 🗸	Analyze
Return to Search  Analyze Total   Analyze Line												

- 4. Review the Collaborator comments which appear in the **Description** field of each line.
- 5. After reviewing the comments, click the Analyze Total hyperlink. The Analyze Total page displays.



A set of the test								
Analyze I otal								
Analyze Total	Analyze Line							
Business Unit:	Event ID:	Round:	Version:		Event Name:			
50100	0000153666	1	3		Collaboration Te	⊧st		
Event Format:	Event Type:	Currency:	End Date:		Status:		Go To:	
Buy	RFx	USD	02/16/2017 11:	14AM EST	Pending Award			
Bid Analysis and	Display Options (	2)						
Analysis								
								Review Type
	Bi	dder Name Carte	Machineny Comp	anv George M	aker			
	Bit	Inc	a machinery comp	any beinge m	anci			
	Event Version Res	ponded To 2		2				
	в	id Number 1		1				
	Total B	d Amount 75,3	44.05	68,275.2	4			
	Tota	al Bid Cost 0.00		0.00				
	Total E	vent Score 0.00		0.00				
	Total He	eader Cost 0.00	20	0.00				
	Iotal Hea	ader Score 0.00	00	0.0000				
		Bid Action NA	~	Award				
	Reje	ect Reason	Q	Disallow	Q			
	Award	by Percent		NA				
		Hide Bid 🗌						
Recalculate	Add / Edit F	Factors	Unhide Bids		<<	<	>	>>
Save 🔯 Retur	m to Search							

Follow normal strategic sourcing processes to make the award. For instructions on the strategic sourcing process and awarding events, refer to the job aid entitled PR345: Strategic Sourcing Bid Factors, Weights, Score and Awards located on the Cardinal website in Job Aids under Learning.