# Strategic Sourcing
## Award Event Quick Reference Guide

Use this checklist when you have **completed** your evaluation and are ready to award your event. **For more in depth detail refer to your training documentation.**

| Step | Description | Comments |
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| 1. | From the event workbench, click on the analyze icon. | |
| **If you are awarding the event in its entirety to one or more bidders** | | |
| 2. | The page opens at Analyze Total | You can award from this page, if you are awarding all line items to one or multiple bidders. |
| 3. | Select the Bid Action for each bidder | From drop down box. **Award**: To award the event to the selected bidder. **Counter**: To invite the bidder to the next round of the event. **Disallow**: To disallow the bid and remove from the event. This is used in situations such as when a bidder has made an erroneous bid on an auction event and the bidder's bid needs to be canceled. You must select a reason code when selecting this option. **Reject**: To reject but not disallow the bid. The system notifies the bidder that the bid was not accepted. You must select a reason code with selecting this option. **N/A**: No action. This is the system default. |
| 4. | Select the Reason Codes for each bidder that is not receiving an award | From drop down box. You must select a reason code when the bid action is Disallow or Reject. |
| 5. | Click on the Reason Code icon | You can add additional information here. |
| 6. | Award by Percent | Enter the percentage for each bidder award. |
| 7. | Click the Refresh Button | |
| 8. | Click on Award Summary | Review the information and make sure that the percentages you selected in Step 6 are reflected here. |
| 9. | Click on Schedule Defaults | Optional – enter the information |
| 10. | Click on Award Detail | Define how you are awarding for each bidder here. |
| 11. | Select Award Type (Purchase Order or General Contract) | Select Purchase Order or General Contract<br><br>If the Award Type is General Contract and will result in an Agency Contract or SWC. The system will generate the Contract ID for you based off of the Business Unit, Origin, and Event ID. Leave the Contract ID field blank. |
| 12. | Enter Terms | |
| 13. | Review Buyer and change if required | The buyer that created the event defaults to this field. It can be changed. |
| 14. | Enter PO Business Unit | You can only select the PO Business unit for which the event was created. |
| 15. | Click Distribution Defaults | Enter Required Distribution Values - Account, Fund, Dept and Fund Src. These fields are |

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|  |  | required, regardless of Purchase Order or General Contract.<br><br>*DOT Users may need to enter additional codes for project costing requirements.*<br><br>*State Purchasing Only – For SWC select the first value of each field.* |
| 16. | Click on Award Detail |  |
| 17. | Review Award Type | Award Type - PO Purchase Order or<br>Award Type - General Contract. General Contract The system will generate the Contract ID.  Leave the contract ID field blank. |
| 18. | Attach award documents:<br>Buyers are <u>required</u> to attach all documents supporting the analysis of the Event, this include the NOIA (if amount >100K) and NOA documentation. **Attach documents prior to awarding the event.** | Look for the **GO TO** dropdown box<br><br>Go To:<br><br>then select Event Comments and Attachments. Upload/Attach all the necessary documents for the Event. |
| 19. | Click on Post Award | PO or Contract window will open, note the PO or contract number.  Complete the Contract or PO now, or complete later. |
| 20. | Close the PO or Contract window |  |
| 21. | If there are multiple awards from this event, Navigate to the second award | Repeat steps 9 through 19 for each awarded bidder. |
| <span style="color:red">**If you are awarding your event by line to one or more bidders**</span> |  |  |
| 22. | From the Analyze total page Click on Analyze Line |  |
| 23. | Select the Bid Action for each bidder by line | From drop down box.<br>**Award**:  To award the event to the selected bidder.<br>**Counter**:  To invite the bidder to the next round of the event.<br>**Disallow**:  To disallow the bid and remove from the event.  This is used in situations such as when a bidder has made an erroneous bid on an auction event and the bidder's bid needs to be canceled.  You must select a reason code when selecting this option.<br>**Reject**:  To reject but not disallow the bid.  The system notifies the bidder that the bid was not accepted.  You must select a reason code with selecting this option.<br>**N/A**:  No action.  This is the system default. |
| 24. | Select the Reason Codes for each bidder that is not receiving an award | From drop down box.  You must select a reason code. |
| 25. | Click on the Reason Code  icon | You can add additional information here. |
| 26. | Enter  the Award by type | You can award by either quantity or percent |
| 27. | If Event has multiple lines | Navigate to the next line – Repeat steps 25-27 for |

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Version 1.0  11/4/2011

| Step | Description | Comments |
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| | | each line |
| 28. | Click on Award Summary | Validate that the award for each bidder for each line is correct |
| 29. | Click on Schedule Defaults | Optional – enter the information |
| 30. | Click on Award Detail | Define how you are awarding for each bidder here.<br>Enter Award Type<br>Enter Terms if required<br>Review the Buyer Name and change if required.<br>Enter the PO Business Unit |
| 31. | Click Distribution Defaults | Enter Required Distribution Values - Account, Fund, Dept and Fund Src.  These fields are required, regardless of Purchase Order or General Contract.<br><br>*DOT Users may need to enter additional codes for project costing requirements.*<br><br>*State Purchasing Only – For SWC select the first value of each field.* |
| 32. | Click on Award Detail | |
| 33. | Review Award Type | Award Type - PO Purchase Order or<br>Award Type - General Contract. General Contract The system will generate the Contract ID.  Leave the contract ID field blank. |
| 34. | Attach award documents:<br>Buyers are <u>required</u> to attach all documents supporting the analysis of the Event, this include the NOIA (if amount >100K) and NOA documentation. **Attach documents prior to awarding the event.** | Look for the **GO TO** dropdown box<br><br>then select Event Comments and Attachments. Upload/Attach all the necessary documents for the Event. |
| 35. | Click on Post Award | PO or Contract window will open, note the PO or contract number.  You may complete the requirements for the contract or PO. |
| 36. | Close the PO or Contract window | |
| 37. | Repeat steps 29 through 37 for each bidder. | |
| 38. | Post NOA on GPR | (See Quick Reference Guide for NOA on GPR) |
| 39. | Login to GPR | |
| 40. | Click Main Menu | |
| 41. | Click Bid Processing | |
| 42. | Click PeopleSoft Menu | |
| 43. | Click Add an Award Document to a Bid | |
| 44. | Select the Bid Number | If you don't see the Bid Number listed, check the Status of the Bid.  In order to add an Award document, the bid must be in the "Awarded" status. Go back to the Event Workbench and check the Status of the Event ID.  If the status displays Awarded, then notify Procurement Help Desk of the issue.<br><br>If the Event Status is Pending Award then this |

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|  |  | means that all the requested quantity has not been awarded.  Review the Event to ensure all expected quantity has been awarded.<br><br>If you choose not to award all the requested quantity then change the Line Status to "C" for close on the Award Summary page of Analyze Events. |
| 45. | Upload the Award Document | Verify that the document opens successfully. |