Strategic Sourcing
Event Modify, Edit and Addendums Quick Reference Guide

Use this check list to create a new version of your event by adding addendums or attachments modify dates, or adding comments.

What you cannot do is add a new line item or decrease the quantity. You cannot modify or add bid factors. **For more in depth detail refer to your training documentation.**

Step	Description	Comments
1.	Begin by clicking on the new version icon on the Event Workbench for your event	Be careful when selecting new version. Once you select, the status of the event is set to open and you must repost. You cannot cancel out of this option.
2.	Review RF Type	While this field is open to change, if you are changing the event from an RFP to RFQ, you should be cancelling the current event and entering a new event
3.	Review Origin	This can be changed.
4.	Review Fiscal year	This can be changed
5.	Event Name	**Should not be changed**. If changing cancel the current event and create a new one.
6.	Event Description	**Should not be changed**. If it is changing cancel the current event and create a new one.
7.	Review Category Type	Can be changed, internal reporting only.
8.	Review Purchase Type	Can be changed, internal reporting only.
9.	Click on Event Settings and Options	Should not be changed.
10.	Click Payment Terms and Contact Info	Fields can be changed.
11.	Click Event Comments	Add Comment with Date, Identify Version Number, Identify the change being made, Include Buyers Name or Initials. For example: 04-29-2009 Version #2 – Added Responses for Questions and Answers. John Doe/Issuing Officer
12.	Add Attachments	Attach any relevant documents, mark appropriately for notifications. Enter any standard comments. If adding Addendums, the file must be labeled as such. For example, if an Addendum is made to any of For eRFx document, the addendum would only consist of the actual change made, not the entire document. **Display to Bidder** – Select this check box if you want this attachment to be available to bidders. This also puts the attachment name in the body of the event invitation and event interest emails. **Include on Award** – Select this check box if you want to include this attachment with the award. **Include in Notification** – **UNCHECK.** You could select to include the attachment in the event invite and event interest notifications that are sent to the bidders. Due to email constraints the State has opted to not send these files attached to the event Invitation. The bidder must log on to view the

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		files.
13.	Click Header Bid Factors	You should not modify the existing bid factors and you cannot add additional bid factors.
14.	Click Line Items – Basic Definition Tab	You can change the description, category code, UOM, quantity and start price. *Consider carefully a description or category change. If these need to be modified, you should probably create a new event.*
15.	Line Items – Advanced Definition Tab	You can modify the shipping information and the bid quantity rule. You can also add price break information. You cannot add bid factors for the line.
16.	Click on the Item Line Defaults	This is another view of the shipping information, which can be modified.
17.	Click on Bidder Invitations	The public box should be checked and you will see the list of bidders that were invited.
18.	Click on the contact icon for the Public Bidder	You can add additional names and email address for bidders and vendors to invite.
19.	Click Search for Bidders	You can search for additional vendors/bidders to invite by entering bidder type and search criteria and then inviting. This may be an option for inviting bidders/vendors for a related NIGP code. Select the desired bidders/vendors from the returned list.
20.	Click Invite Collaborators	Optional - Before inviting, review the preview, start, and end date of the event to allow time for the collaboration. Collaboration must complete before the Preview date.
21.	Review Preview, Start and End Dates	Do not end your event on a Monday if at all possible. Preview Date and Start Date are typically the same. If you have a pre-bid conference you may want the bidders to see the event (preview) for a period of time prior to the start date. The start date is the date that bidders can begin responding to the event.
22.	Click on Event Comments and Attachments	Make sure that you added a comment for the change and marked "Send to Bidder".
23.	Save the Event	
24.	Review the Event	Make sure that dates are correct, all attachments, bid factors and information is correct.
25.	Review the dates again	Make sure that times are reasonable, they should be at the half or full hour. You may have to modify the dates to allow bidders/vendors time to respond to the changes to the event.
26.	Post the Event	Vendors can now view and respond to the event (after the start date).
27.	Review the process monitor Process Scheduler→Process Monitor Enter User ID and Enter AUC_PDF as the Name Field	Review the process monitor and make sure that the AUC_PDF process runs to a successful completion and is Posted. If the process indicates No Success or Not Posted immediately report the

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	Name: AUC_PDF	issue providing the process instance number.
28.	Validate GPR	Log on to GPR and make sure that your event is posted.