



Strategic Sourcing Partial Award Quick Reference Guide

Use this checklist when you are awarding a partial event. You can award partially at the header or line level. If you are not going to award any of the event, then you should cancel the Event.

A line that has been closed can be re-opened if necessary. **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. | |
| 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. If you are awarding a partial this should add up to less than 100%. |
| 7. | Click the Refresh Button | |
| 8. | Click on Award Summary | Review the information and make sure that the percentages or quantity 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 If the Award Type is General Contract and will result in an Agency Contract, leave the Contract ID field blank. The system will generate the Contract ID. |



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| | | If the award type is General Contract and this is a SWC enter the contract number using the required naming convention. |
| 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 Distribution Values |
| 16. | Click on Award Detail | |
| 17. | Review Award Type | Purchase Order or General Contract Award Type - PO, leave field blank Award Type - General Contract (not a SWC), leave the field blank. The system will generate the contract ID. Award Type - General Contract (is a SWC) enter the contract number |
| 18. | Click on the Comments icon or from the Go To box select Event Comments and Attachments | 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. |
| 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 17 for each awarded bidder. |
| 22. | If you are awarding your event by line to one or more bidders | |
| 23. | From the Analyze total page Click on Analyze Line | |
| 24. | Select the Bid Action for each bidder by line | 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. |



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| | | N/A: No action. This is the system default. |
| 25. | Select the Reason Codes for each bidder that is not receiving an award | From drop down box. You must select a reason code. |
| 26. | Click on the Reason Code icon | You can add additional information here. |
| 27. | Enter the Award by type | You can award by either quantity or percent |
| 28. | If Event has multiple lines | Navigate to the next line – Repeat steps 25-27 for each line |
| 29. | Click on Award Summary | Validate that the award for each bidder for each line is correct |
| 30. | Click on Schedule Defaults | Optional – enter the information |
| 31. | Click on Award Detail | Define how you are awarding for each bidder here. Enter Award Type Enter Terms if required Review the Buyer Name and change if required. Enter the PO Business Unit |
| 32. | Click Distribution Defaults | Enter Distribution Values |
| 33. | Click on Award Detail | |
| 34. | Review Award Type | If the award type is PO, do nothing If the award type is General Contract and this is a SWC enter the contract number. If it is not a SWC enter nothing in the contract ID field. |
| 35. | Click on the Comments icon or from the Go To box select Event Comments and Attachments | Buyers are required to attach all documents supporting the analysis of the Event, this includes the NOIA (if amount >100K) and NOA documentation. |
| 36. | Click on Post Award | PO or Contract window will open, note the PO or contract number. You can complete the requirements for the contract or PO now, or you can come back to them later. |
| 37. | Close the PO or Contract window | |
| 38. | Repeat steps 29 through 37 for each bidder. | |
| 39. | Post NOA on GPR | |
| 40. | Login to GPR | |
| 41. | Click Main Menu | |
| 42. | Click Bid Processing | |
| 43. | Click PeopleSoft Menu | |
| 44. | Click Add an Award Document to a Bid | |
| 45. | 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. |
| 46. | Upload the Award Document | Verify that the document opens successfully. |

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| 47. | To close the remaining unawarded quantities | Navigate back to the Bid Analysis pages after completing all the above steps. |
| 48. | Click on the Award Summary Page | The lines with a remaining quantity to be awarded should have a Quantity Remaining and a line status of "O" (Open). |
| 49. | Close the Line | Change the line Status to "C" (Closed) |
| 50. | Click on Save | The line status is now closed and you cannot award the remaining quantity. |
| 51. | To re-open the remaining unawarded quantities | Navigate back to the Bid Analysis pages after completing all the above steps. |
| 52. | Click on the Award Summary Page | The lines with a remaining quantity to be awarded should have a Quantity Remaining and a line status of "C" (Closed). |
| 53. | Open the line quantity | Change the line Status to "O" (Open) |
| 54. | Click on Save | The line status is now open and you can award the remaining quantity. |
| 55. | | |