Nav Bar

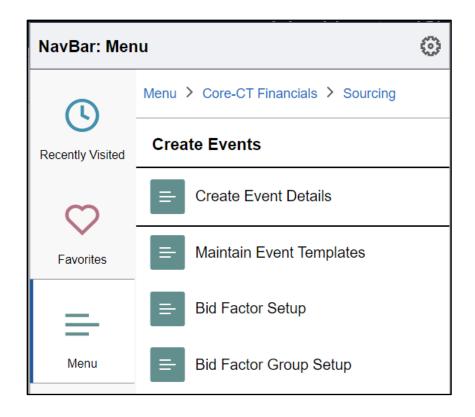
Core-🚺

Create and Managing Events

Events are posted opportunities to which school districts can submit grant applications as bids. Templates can be created to quickly create events that have shared features and settings, such as the bid factors or the invited bidders list. If a new event type needs to be created, reference the job aid Create an Event Template.

Navigation:			
Core-🛺 💿 🗢	Menu 🗸 Search in Menu	٩	_ ÷ ♀ ∩

Nav Bar > Menu > Core-CT Financials > Sourcing > Create Events > Create Event Details



Create and Managing Events Strategic Sourcing Core-CT Financials November 7, 2024



Create a New Event:

- 1. Enter Business Unit (if not defaulted).
- 2. Event ID should be NEXT.
- 3. Event Format should be Buy.
- Event Type should be RFx.
 Click Add.

\leftarrow 0 \heartsuit	
Create Events	
Add a New Value	Q Find an Existing Value
*Business Unit	DASM1 Q
*Event ID	NEXT Q
Event Round	1
Event Version	1
*Event Format	Buy 🗸
*Event Type	RFx v
Proxy Bidding (Auctions Only)	Disabled v
Add	

The **Create an Event** page contains the event creation process steps including the Event Summary, Define Event Basics, Configure Line Items, Select Bidders to Invite, Invite Collaborators, and Post Event.

- 1. Under the **Event Summary** section, populate the event by copying a template. In the **Copy From** field, select Sourcing Template. Press **Go**.
 - Always do this step first. If you copy a template later in the process, it will overwrite any fields you have entered on the Event Summary pages.

\leftarrow 0 \diamond					
Create Event Detai	ils				
Create an Event					
Event Summary					
-					
Business Unit	DASM1 Event ID NEXT	Round 1	Version 1	Event Format Buy	Ø
Event Type	RFx Char	nge to Auction			
Event Status	Open		Time Zone ED		
*Event Name			Preview Date	04/2024 🛗 Time 2:55PM	
Description		2E)	Start Date 04/0	06/2024 🛗 Time 2:55PM	
			End Date 04/1	16/2024 🛗 Time 2:55PM	
		<i>l</i> 2	Copy From Sou	urcing Template ~	Go
Line dase mornault, gen	eral 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 L Create line listings for this ev					
	* Line Items			Item Line Defaults	
Step 3: Select Bidd Send out targeted invitations	ers to Invite s to this event, designate it as a public event, or bo	th.			
	* Bidder Invitations				
Step 4: Invite Colla	borators				
	n this event. You may not post your event while co	llaborators are reviewing it.			
	Event Collaborators				
Step 5: Post Event When all event creation activ	vities are complete, click Post Event to release you	ur event for scheduled external	viewing and trigger an	y bidder invitations you may have defined.	
	Save Event]		Save As Template	
	Post)		Preview PDF	
Related Links:					
	Document Status Inquiry			View All Attachments for Event Plan Task Associations	
Refresh					Add Update/Display

The **Copy Criteria** page is displayed. This page allows users to update the parameters for the template being transferred to the event.

Create and Managing Events Strategic Sourcing Core-CT Financials November 7, 2024

Core-📴

- 2. Under Enter Copy Criteria enter in the following information:
 - Copy From Sourcing Template.
 - Business Unit DASM1.
 - Copy Method Override.
 - Event Type is RFx.

$\leftarrow \mid \bigcirc \diamondsuit$
Create Event Details
Create an Event
Enter Copy Criteria
Copy Template
Copy From Sourcing Template
Select Criteria
Business Unit DASM1 Q
*Copy Method Override 🗸
Event Type RFx 🗸
Copy Criteria
Template ID Q
Search
Return

Core-📴

- Template ID.
 - Click the magnifying glass next to **Template ID** to bring up a popup window with all available templates.
 - Select the appropriate template.

← ⊙ ♡	Lool	Up Template ID	×		$\hat{\Box}$	Û	: 0
Create Event Details	Template Type = Template ID begin Template Description begin	DASM1 Buy RFx s with v	Help	New Window	Help	Perso	nalize Page
Copy Criteria	Search Results						
Template ID	View 100	< < 1-5 of 5 ♥ > >					
	Event ID Template Type	e Template ID Template Description					
Search	SCP0000003 Bus Unit	PRIORITY Priority Template					
	SCP0000009 Bus Unit	NP-MD Non-Priority Template					
Return	SCP0000040 Bus Unit	SINGLE-P Single Priority					
	SCP0000041 Bus Unit	SINGLE-NP Single Non-Priority					
	SCP0000085 Bus Unit	HVAC_2 HVAC-ROUND2					
		· · ·	4				

The Template ID will populate

• Click Search.

$\leftarrow \mid \circ \circ$
Employee Self Service Create Event Details
Create an Event
Enter Copy Criteria
Copy Template
Copy From Sourcing Template
Select Criteria
Business Unit DASM1 Q
*Copy Method Override
Event Type RFx -
Copy Criteria
Template ID SCP0000003 Q I
Search
Return

- 3. A pop-up window titled Event Lines to Copy will appear.
 - Check the box in the 'Sel' column.
 - Click **OK**.

									L H
Deselect	t All								
								< 1-1 of 1 🛰	✓ > > I View A
Group ID	Description	Quantity	UOM	Price	Currency	Business Unit	Event ID	Due Date	Ship To
	Priority Application	1.0000	EA	1000.0000	OUSD	DASM1	SCP000003	11/05/2018	0640000558
		Group ID Description	Group ID Description Quantity	Group ID Description Quantity UOM	Group ID Description Quantity UOM Price	Group ID Description Quantity UOM Price Currency	Group ID Description Quantity UOM Price Currency Business Unit	Group ID Description Quantity VOM Price Currency Business Unit Event ID	Group ID Description Quantity UOM Price Currency Business Unit Event ID Due Date

The **Line Items** page is displayed. It contains the line-item information. No changes need to be made on this page.

4. Click the Return to Event Overview link.

$\leftarrow \mid \odot \heartsuit$								
Create Event Details								
Create an Event								
Line Items								
Business Unit DASM1 Event ID NEXT Round 1 Versiv Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create		It Format Buy or by copying lines from a	Event Typ n existing event or		r allowed transaction	types.		
Copy From Sourcing Template Go]		F	iltered View A	II Lines and Groups	~		
Line Items ⑦								
							1-1 of 1 👻 > 🔷	View All
Basic Definition Advanced Definition								
Line Item ID Description		Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting	
1 Priority Application	1	72000000 Q	EA Q	1.0000	1000.0000	\$1,000.00	100.00000	+
Event Total: 1000.0000 USD Group Selected Lines OK]				Line Weighting Tota	I: 100 % Remainin	g Weight: 0%	
< Return to Event Overview Save Event Changes				GoTo		Go		
Refresh							Add	Jpdate/Display

- 5. Scroll to the top of the page, and under **Event Summary**, update the following information as needed.
 - Event Name
 - Description
 - Preview Date and Time
 - ***New Feature*** Events may be posted but the notifications delayed until the Preview Date.
 - If the preview date is before the time when the event is posted, the notifications will be sent out immediately.
 - If the preview date is set after the time when the event is posted, the notifications will be sent on the preview date.

NOTE: The notification process will run daily Monday – Friday at 8:00 AM. Verify that the preview date falls on a regular business working day (No weekends or holidays).

- The preview date cannot be later than the Start Date. During the preview period, suppliers are allowed to click into and review the bid but are not able to submit. If no preview period is needed, put the Preview Date Time as 1 minute before the Start Date Time.
- Start Date and Time
 - Once this date is reached, bids may be submitted.
- End Date and Time
 - Once this date is reached, bids can no longer be submitted.

\leftarrow 0 \heartsuit							
Create Event Det	ails						
Create an Event Event Summary							
Business Un		Event ID NEXT	Round	1 Version	1 Eve	ent Format Buy	Ø
Event Typ Event Statu *Event Name Description	s Open Priority Applica	tion Invitation	Change to Auction r 1, 2018 to	Preview Date Start Date	EDT 04/04/2024 (1) 04/06/2024 (1) 04/16/2024 (1)	Time 2:55PM Time 2:55PM Time 2:55PM	
				Copy From	Sourcing Template	~	Go

Scroll down the page to Step 1: Define Event Basics

- 1. Click the link to Event Settings and Options.
 - The Event Settings and Options page does not update from the copied template.

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		

- 2. Review the fields and update as needed for the event.
- 3. The following checkboxes should be CHECKED.
 - i. Create PDF on Event Post.
 - ii. Bid Required on All Lines.
 - iii. Multiple Bids Allowed.
 - iv. Allow Edit of Posted Bids.
 - v. Allow Send NOA Notification
- 4. The following Checkboxes should be UNCHECKED.
 - i. Allow Bidder XML Downloads
 - ii. Do Not Use Best Bids on New Rounds
 - iii. Display Bid Factor Best/Worst.
 - iv. Sealed Event
 - v. Display Bid Factor Weightings
 - vi. Display Bid Factor Best/Worst
- 5. In the Round/Version Display field, select "Do Not Display."
- 6. In the Notification To be Sent field, select "Specific Bidders."
- 7. In the Award Template field, select "AUC_NOA_1".
- 8. In the Non-Award Template field, select "AUC_NONA_1".
- 9. In the Start Price field, select "Do Not Display."

· © 🗢					
eate Event Details					
reate an Event					
vent Settings and Options					
Business Unit DASM1	Event ID NEXT Round 1	Version 1 Event F	Format Buy Event Type	RFx	
	Create PDF on Event Post Create PDF on Event Post	Round\Version Display	Do Not Display ~		
	Bid Required On All Lines		Sealed Event		
	Multiple Bids Allowed		Display Bid Factor Weightings		
	✓ Allow Edit of Posted Bids □ Do Not Use Best Bids on New Rounds □ Display Bid Factor Ideal Value		Display Bid Factor Best/Worst		
		*Award Template	AUC_NOA_1	Q	
	Allow Send NOA Notification				
Notification To be Sent	Specific Bidders 🗸	*Non-Award Template	AUC_NONA_1	Q	
Factor Event Score Into	Total Score	Start Price	Do Not Display ~		
Header Weighting		etart 1100			
Line Factor Weighting		ſ	Diddee May Courts Line Courts		
			Bidders May Create Line Groups		
Minimum Response and Wa	rning				
Minimum numb	er of bid response	Number of days warr	ning prior		
> Associated Categories ⑦					
Save Event Changes		GoTo		~ Go	
Return to Event Overview					

10. When complete, click Save Event Changes

11. A Pop-up window will appear confirming you selection to not Display Bid Factor Ideal Value to the Bidders. Click **OK**.

You have chosen not to display bid factor ideal value to the Bidders. (18058,8609)
This action will reset 'Ideal Response Required' on all the bid factors in the event to No. Click OK to continue or Cancel if you do not want to make any changes.
OK Cancel



12. Click Return to Event Overview

13. Navigate to **Step 1: Define Event Basics** and click the link to **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				
Step 2: Configure Line Items Create line listings for this event.					
* Line Items	Item Line Defaults				

The **Event Comments and Attachments** page displays additional comments and documentation related to the event, with the option to send them immediately or include them on the award. This content will be updated from the template. Review the pages to ensure the information is accurate for this event.



14. If needed, enter any comments into the Comments box. Click on the plus sign (+) to add an additional comment box.

15. Select the appropriate checkbox to "Send to Bidder" when the event is sent and/or to include the comment "On Award."

\leftarrow \odot \odot	Q Search in Menu
Create Event Details	
Create an Event	
Event Comments and Attachments	
Event ID NEXT	
Enter Comments ⑦	$ \langle \langle 1 \text{ of } 1 \mathbf{v} \rangle \rangle > I \text{ View All}$
Comments: Please read the instructions.	+ –
Send To Bidder Include On Award Add Attachment OK Cancel	Standard Comments

16. To add files, click the **Add Attachment** button This is the location where FAQs and documents to support the school's application process may be uploaded.

\leftarrow \odot \odot	Q Search in Menu
Create Event Details	
Create an Event	
Event Comments and Attachments	
Event ID NEXT	
Enter Comments ⑦	$ \langle \langle 1 \text{ of } 1 \checkmark \rangle \rangle I \text{ View All}$
Comments:	+ -
Please read the instructions.	직
Send To Bidder	Standard Comments
Add Attachment	
OK Cancel Refresh	

17. A pop-up window will appear.

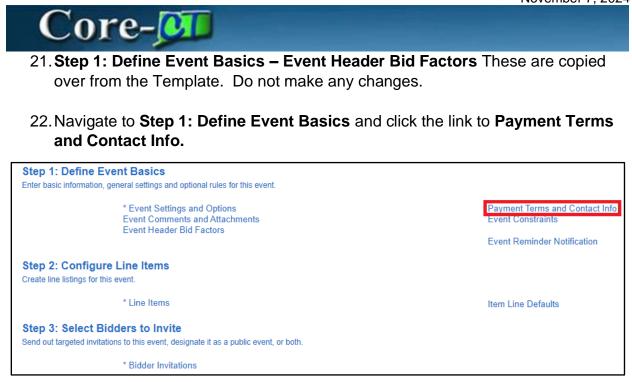
18. Browse for the document(s) on the computer, select the document(s) and click the upload button.

Selec:	×	
You may attack	h up to 99 files to upload	
Choose Files	No file chosen	
Upload	Cancel	
		.:

19. Enter an **Attachment Description** and choose where the attachment will be displayed. (Display to Bidder, Include On Award, Include in Notifications)

\leftarrow \odot \heartsuit	Q Search in Menu
Create Event Details	
Create an Event	
Event Comments and Attachments	
Event ID NEXT	
Enter Comments 🕐	< < 1 of 1 ♥ > > View All
Comments:	+ -
Please read the instructions.	لھ ا
Send To Bidder	Standard Comments
Add Attachment	
Attachments ③	
Ē	< < 1-1 of 1 → >
Attached File Attachment Description	Display to Include On Include in Bidder Award Notifications
test2.excel2003.xlsx Test	U View —
OK Cancel Refresh	

20. Click **OK** to return to the Events Summary page.



The **Payment Terms and Contact Info** page specifies the contact information which will be published with the event along with payment information. This information needs to be updated in every event.



- 23. Under Payment & Currency Information:
- 24. The **Bill Address** should be the code for OSCG&R Address.
- 25. Enter the correct **Buyer** ID.
- 26. Under Event Contact:
- 27. Enter the Contact Name.
- 28. Enter the **Email ID**.
- 29. Enter a **Phone number**.
- 30. Click Save Event Changes and Return to Event Overview.

\leftarrow \odot \heartsuit			Q Search in Menu
Create Event Details			
Create an Event Event Contact Details			
Payment & Currency Information ②			
*Currency USD Q	Exchange Rate	*Rate Type CRRNT Q	
Pay Method	Ŭ	Rate Date 10/01/2018	
Payment Terms Q		Allow bids in other curre	ncies
Bill Addrs 0640000058 Q		Tax Exempt	
Buyer		Exempt ID	
Event Contact ⑦			
Contact Name DAS Grants Admin	istration		
Email ID DAS.GrantsAdmini	stration@ct.gov		
Phone			
Save Event Changes		GoTo	Go
< Return to Event Overview			
Refresh			Add Update/Display

31. Step 1: Define Event Basics – Event Constraints are not used. Do not make any changes.

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32.*New Feature* Step 1: Define Event Basics and click the link to Event Reminder Notification.

The Event Reminder Notification is an **optional** step to send out reminder emails that an event will be ending. Reminders may be set for either the bidders, the event creator or both.

Event Detai		nd 1 Version	1 Event Format Buy	
				0
Event Type	RFx Change to Auction			
Event Status	Open	Time Zone	EDT	
*Event Name	Priority Application Invitation	Preview Date	04/17/2024 🛗 Time 9:48AM	
Description	This Priority Event is open from October 1, 2018 to June 29, 2019.	Start Date	04/19/2024 Time 9:48AM	
		End Date	04/29/2024 📅 Time 9:48AM	
		Copy From	Sourcing Template Go	
1: Define Ever	ges marked with an asterisk (*) you may not save your event unt nt Basics eral settings and optional rules for this event.	il all required fields are filled.		
	* Event Settings and Options			
			Payment Terms and Contact Info	

33. Event Reminder Notification

- Click the checkbox to Allow Event Reminder Notification
- Enter the # of Day(s) Prior to Event End Date or Enter the Notification
 Date. (Updating one field will automatically update the other one)
- The Audience default is All.
 - Other options are Accepted, In Progress, or Not Started
- Message Priority is Normal
- To add additional reminders, click the plus sign (+) at the end of the row
- To remove a row, click the minus sign (-) as the end of the row.
- Click Return to Event Overview

34. Notification to Event Creator

- Enter the number of Day(s) prior to Event End Date.
- If no reminder is needed enter zero.

NOTE: The notification process will run daily Monday – Friday at 8:00 AM. Verify that the reminder date falls on a regular business working day (No weekends or holidays).

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← ⊙ ♡			Q Search	h in Menu	
Create Event Det	ails				
🥭 🖬 😯 🌣 📓					
Create an Event					
Event Reminder	Notification				
Business Ur	nit DASM1 Event ID NEXT	Round 1 Version 1	Event Format E	Buy Event Type	RFx
Allow E	Event Reminder Notification				
Event Reminder 1	Notification Options				
E, Q				<	> > I View All
Sequence	*Day(s) Prior to Event End Date	Notification Date	*Audience	*Message Priority	
1	10	09/08/2024	All 🗸	Normal	✓ + -
Notificat	tion to Event Creator 2 Day(s) Prior to	Event End Date			
< Return to Event Over	rview	GoTo		Go	
Refresh					Add Update/Display

Sample Bidder Reminder Email

Event Reminder Notification					
Message 1:	Priority - Normal - Reminder - Event ID : DASM1-SCP0000111 Round 1 Version 1 - Awaiting bid response. (18058,8969)				
Explanation	This is a reminder that you have been invited to participate in a strategic sourcing event. Review this information and : use the URL to bid on this event. Event Id: DASM1-SCP0000111 Round 1 Version 1 Event Starts: 2024-08-21 12.01.00 AM EST Event Ends: 2024-09-30 08.00.00 AM EST				
Go To:	Transaction Detail				

Sample Event Creator Reminder Email

Event Reminder Notification					
Event ID : DASM1-SCP0000113 Round 1 Version 1 is ending soon. Event end date - 2024-09-30 11.24.00 AM EST. (18058,8971)					
This is a reminder that the strategic sourcing event you have created is ending soon. Review this information and use : the URL to view this event. Event Id: DASM1-SCP0000113 Round 1 Version 1 Event Starts: 2024-09-05 11.25.00 AM EST Event Ends:2024-09-30 11.24.00 AM EST					
Notification Detail					
Transaction Detail					

35. Step 2: Configure Line Items – Line Items and Item Line Defaults are copied over from the Template. No changes should be made.



36. Step 3: Select Bidders to Invite and click the link Bidder Invitations.



The **Invite Bidders** page is useful for managing the invitation list of eligible bidders on an event. This comes pre-populated from the template. However, it is still possible to manually remove or add bidders to the current list.

37. Review the Bidder Invitation List

- Do not check the Public Event option above the Bidder Invitation List table. This will invite all suppliers in the state.
- To review the contact information for each supplier, go to the list icon in the tenth column.
- To delete a supplier, click the **minus button** in the tenth column.
- To add a bidder
 - Click Search for Bidders underneath the Bidder Invitation List table.
 - $\circ\;$ In the pop-up window, use any of the search criteria to find the intended supplier.
 - Check Invite column
 - Click Return to Invite Bidders.

© ♡							Q Search in Mer	iu	
eate Event D	etails								
odify an Ever vite Bidders	t								
Busines	Unit DASM1 Even	ID SCP0000103 Rour	nd 1 Version 1 Eve	nt Format Buy	Event Typ	be RFx			>
> Diversity Info	rmation ⑦						Click the an of bidders.	rows to scroll the row	rs
Public Event							of bladers.		J
dder Invitation	List ⑦								-
更 Q Personalize		1				ŀ		173 ~ > >	I View
Zoom Bidder In	vitation List	s Location	Bidder Company	Category	Diversity	*Dispatch Me	thod		
Download Bidde	er Invitation List Table to Excel	MAIN	TOWN OF ANDOVER			Email	~	5	
00000002	Supplier	MAIN	CITY OF ANSONIA			Email	~	8	-
00000003	Supplier	MAIN	TOWN OF ASHFORD			Email	~	8	-
00000004	Supplier	MAIN	TOWN OF AVON			Email	~	8	E
00000005	Supplier	MAIN	TOWN OF BARKHAMSTED			Email	~		E
00000007	Supplier	MAIN	TOWN OF BERLIN			Email	~	8	-
80000000	Supplier	MAIN	TOWN OF BETHANY			Email	~	8	-
00000009	Supplier	MAIN	TOWN OF BETHEL			Email	~		-
00000011	Supplier	MAIN	TOWN OF BLOOMFIELD			Email	~		-
00000012	Supplier	MAIN	TOWN OF BOLTON			Email	~	8	-
00000013	Supplier	MAIN	TOWN OF BOZRAH			Email	~		-
00000014	Supplier	MAIN	TOWN OF BRANFORD			Email	~	8	
00000015	Supplier	MAIN	CITY OF BRIDGEPORT			Email	~	8	
lick the Search f		MAIN	CITY OF BRISTOL			Email	~		
add additional	bidders.	MAIN	TOWN OF BROOKFIELD			Email	~	5	
~									_Ļ
arch for Bidders				Save Bidd	ers as Group		Click the icon to details.	bring up bidder	- 41

- 38. Click Return to Event Overview.
- 39. Step 4: Invited Collaborators Event Collaborators is not used. Skip this section.

Core-🚺

- 40. Step 5: Posted Event
- 41. If the event is not ready to be posted, click **Save Event**.
- 42. Click the **Post** button when the event is complete.
- 43. Save as Template do not use while creating an Event
- 44. Preview PDF do not use

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.						
			Payment Terms and Contact Info Event Constraints			
			Event Reminder Notification			
Step 2: Configure L Create line listings for this ev						
	* Line Items		Item Line Defaults			
Step 3: Select Bidd Send out targeted invitations	ers to Invite to this event, designate it as a public event, or bo	th.				
	* Bidder Invitations					
Step 4: Invite Collal Invite others to collaborate of	borators n this event. You may not post your event while co	llaborators are reviewing it.				
	Event Collaborators					
Step 5: Post Event When all event creation acti	vities are complete, click Post Event to release you	ur event for scheduled external viewing and trigger any	bidder invitations you may have defined.			
	Save Event]	Save As Template			
	Post		Preview PDF			
Related Links:						
	Document Status Inquiry		View All Attachments for Event Plan Task Associations			
Refresh				Add	Update/Display	

45. A message will pop-up stating that: "This will submit the Event for Approval." Click **OK**.

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.
OK Cancel

New Feature Events may be posted but the notifications delayed until the Preview Date.

If the preview date is before the time when the event is posted, the notifications will be sent out immediately.

If the preview date is set after the time when the event is posted, the notifications will be sent on the preview date.

Nav Bar

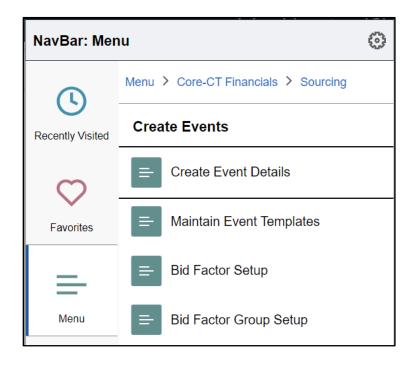


Modifying an Event

Events may require edits in situations in which the parameters are re-adjusted or the event needs to be canceled. Event modification can even occur on events that have already been posted.

Navigation:			
Core-🛺 🛇 🗢	Menu 🗸 Search in Menu	Q	_ ÷ ÷ <u>`</u> 0

Nav Bar > Menu > Core-CT Financials > Sourcing > Create Event Details



1. Click the Find an Existing Value

← © ♡		Q Search in Menu		
Create Events				
2 🖬 🕂 🌞 🖬				
Add a New Value			Q Find an Existin	ng Value
*Business Unit	DASM1 Q			
*Event ID	NEXT Q			
Event Round	1			
Event Version	1			
*Event Format	Buy 🗸			
*Event Type	RFx v			
Proxy Bidding (Auctions Only)	Disabled V			
Add				

- 2. DASM1 will default as the Business Unit
- Enter any other search parameters needed.
 Click Search.

\leftarrow \odot \bigcirc	Q Search in Menu
Create Events	
Find an Existing Value	⊕Add a New Value
Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.	
Recent Searches Choose from recent searches Searches Choose from saved searches	• Ø
*Business Unit = V DASM1 Q	
Event ID begins with 🗸	
Event Round =	
Event Version =	
Event Format 😑 🗸	
Event Type 📮 🗸	
Event Name begins with 🖌	
Event Status = 🗸	
∧ Show fewer options □ Case Sensitive	
Search Clear	

5. Click on the row of the desired event

	Search Results 3 rows - Business Unit "DASM1"										
I< < 1-10 of 98 → >I View All											
Business Unit	Event ID	Event Round	Event Version	Event Format	Event Type	Event Name	Event Status				
DASM1	SCP0000100	1	1	Buy	RFx	Priority Application Invitation	Posted	>			
DASM1	SCP0000099	1	1	Buy	RFx	Priority Project 0329_4	Open	>			
DASM1	SCP0000098	1	1	Buy	RFx	Priority Application Invitation	Posted	>			
DASM1	SCP0000097	1	1	Buy	RFx	HVAC Application Invitation	Posted	>			
DASM1	SCP0000096	1	1	Buy	RFx	Non-Priority Application Invitation	Open	>			
DASM1	SCP0000095	1	1	Buy	RFx	Priority Application Invitation	Posted	>			
DASM1	SCP0000094	1	1	Buy	RFx	Priority Application Invitation	Open	>			
DASM1	SCP0000093	1	1	Buy	RFx	Fluid Project Bid Factor	Posted	>			
DASM1	SCP0000092	1	1	Buy	RFx	HVAC Application Invitation	Posted	>			
DASM1	SCP0000091	1	1	Buy	RFx	Priority Single Application Invitation	Posted	>			

Core-🛺

- 6. Edit the necessary fields.
- 7. Click Save Event.
- 8. If the event has not been posted, click **Post Event** to send out the event out to the bidders.
- 9. If the event has been posted, a pop-up message will display to determine the next steps:

First pop up message: Do you want to recreate the file generated at the posting?

- i. Yes- will regenerate and save.
- ii. No will save the event.

Second pop up message: Do you want to notify the invites again?

- i. Yes will send an email to all bidders.
- ii. No does nothing.

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 a	iny bidder invitations you may have defined.			
Save Event	Save As Template			
Post Event				
Related Links:				
Document Status Inquiry	View All Attachments for Event Plan Task Associations			
Last Updated By: Accenture-Jorge Jimenez 04/09/2024 09:49 AM EDT				
Return to Search Refresh	Add Update/Display			

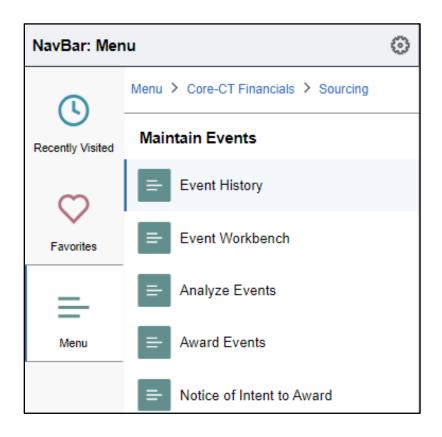
Core-🚺

Viewing Event History

Event History is a space for viewing all changes made to any Strategic Sourcing event. It is also a central location for performing several event-related actions including analyzing bids.

Navigation:			
Core-∭ ⊙ ♡	Menu 🗸 Search in Menu	٩	0 ÷ ÷ 0
			Nav Bar

Nav Bar > Menu > Core-CT Financials Sourcing > Maintain Events > Event History





1. Click the Find an Existing Value

$\leftarrow \mid \odot \heartsuit$		Q Search in Menu		
Create Events				
2 🖬 😌 🌞 🖬				
Add a New Value			Q Find an Existin	ig Value
*Business Unit	DASM1 Q			
*Event ID	NEXT Q			
Event Round	1			
Event Version	1			
*Event Format	Buy 💙			
*Event Type	RFx V			
Proxy Bidding (Auctions Only)	Disabled 🗸			
Add				

Core-💴

- 2. DASM1 will default as the Business Unit
- 3. Enter any other search parameters needed.
- 4. Click Search.

\leftarrow \odot \heartsuit	Q Search in Menu									
Event History										
Find an Existing Value										
✓ Search Criteria										
Enter any information you have and click Search. Leave fields blank for a list of all values.										
Recent Searches Choose from recent searches	• //									
*Business Unit = 🗸 DASM1 Q										
Event ID begins with 🗸										
Event Round =										
Event Version = V										
Event Format = 🗸										
Event Type = 🗸										
Event Name begins with 🕶										
Template ID begins with 🖌										
Template Type = V										
Allow Proxy Bidding =										
Show fewer options Case Sensitive										
Search Clear Save Search										

5. Click on the row of the desired event

- (5	\heartsuit							Q Search ir	n Menu				
ent Hist	ory												
	< < 1-10 of 98 → > > View All												
Business Unit	Event ID	Event Round	Event Version	Event Format	Event Type	Event Name	Template ID	Template Type	Allow Proxy Bidding				
DASM1	SCP0000001	1	1	Buy	RFx	Non-Priority Application Invitation	(blank)	(blank)	No	>			
DASM1	SCP0000002	1	1	Buy	RFx	Priority Application Invitation	(blank)	(blank)	No	>			
DASM1	SCP000003	1	1	Buy	RFx	Priority Application Invitation	PRIORITY	Bus Unit	No	>			
DASM1	SCP0000004	1	1	Buy	RFx	Non-Priority Application Invitation	NON-PRIOR	Bus Unit	No	>			
DASM1	SCP0000005	1	1	Buy	RFx	Non-Priority Application Invitation	(blank)	(blank)	No	>			
DASM1	SCP0000006	1	1	Buy	RFx	Non-Priority Application Invitation	(blank)	(blank)	No	>			
DASM1	SCP0000007	1	1	Buy	RFx	Non-Priority Application Invitation	(blank)	(blank)	No	>			
DASM1	SCP000008	1	1	Buy	RFx	Non-Priority Application Invitation	(blank)	(blank)	No	>			
DASM1	SCP0000009	1	1	Buy	RFx	Non-Priority Application Invitation	NP-MD	Bus Unit	No	>			
DASM1	SCP0000010	1	1	Buy	RFx	Non-Priority Application Invitation	(blank)	(blank)	No	>			

Core-🚺

The **Event History** page displays the history of the event, and contains icons that will navigate users to important event-related actions:

- 6. Create Event: Launches Event Details
- 7. Event Approval: Event approval is not used
- 8. Dispatch Event: Dispatch Event is not used
- 9. Receive Bids: Launches Bidder Response
- 10. Analyze Bids: Launches Analyze Event
- 11. Award Event: Links to Award Details

NOTE: If there are no results, the associated link will not be active

(e.g. If no bids have been awarded, the Award Event link will not be active)

Event History	1					
Event Informati	on					
Bus. Unit	Event ID	Eve	ent Name	Format	Туре	Status
DASM1	SCP0000001	Non-Priority Application Invitation		Buy	RFx	Pending Award
Version History						
EF Q					K ≤ 1-1 of 1	✓ > > I View All
Round	Version		Event Status		Modified By	
1		1	Pending Award		DAS-Dixon Michelle R	Q
Event Stage						
Create Event	Event Approval	I	Dispatch Event F	Receive Bids	Realize Bids Awa	erd Event