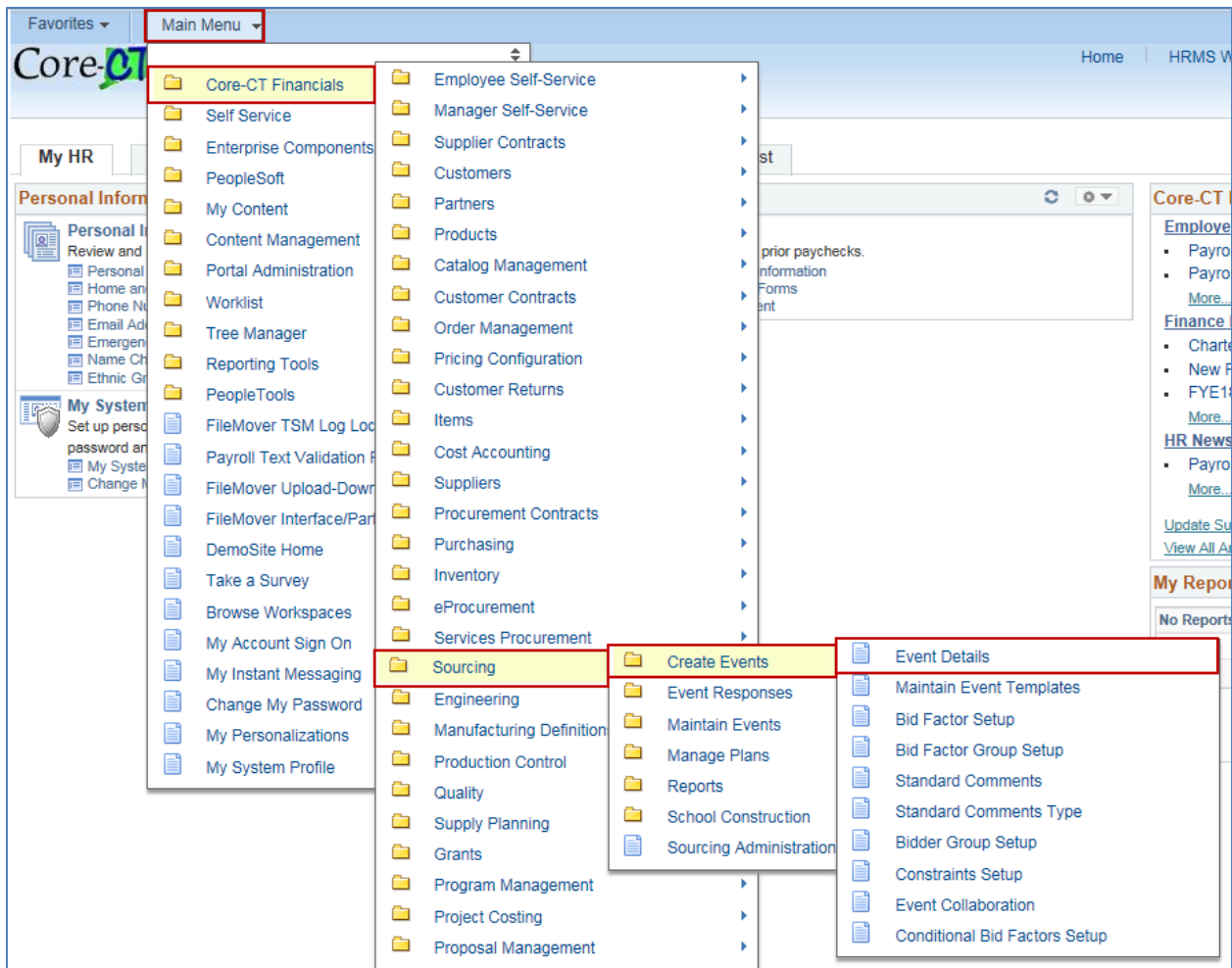




## Create and Post an Event

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:** *Main Menu > Core-CT Financials > Sourcing > Create Events > Event Details*





1. Go to the **Add a New Value** tab, and enter the following information:
  - Enter **Business Unit** DASM1.
  - Enter **Event ID** NEXT.
  - Select **Format** Buy.
    - For informational bids, select RFI.
  - Select **Event Type** RFX.
2. Click **Add**.

**Create Events**

[Find an Existing Value](#) **Add a New Value**


---


Business Unit  


Event ID  

Event Round 1

Event Version 1

Event Format  

Event Type  

Proxy Bidding (Auctions Only)  

[Find an Existing Value](#) | [Add a New Value](#)

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

1. Under **Event Summary**, populate the event by selecting the 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 into the Event Summary pages.

Create an Event

### Event Summary

Business Unit DASM1    Event ID NEXT    Round 1    Version 1    Event Format Buy

---

Event Type RFX [Change to Auction](#)

Event Status Open

\*Event Name

Description

Time Zone EDT

Preview Date

Time

Start Date

Time

End Date

Time

Copy From

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](#)

#### Step 2: Configure Line Items

Create line listings for this event.

[\\* Line Items](#)

[Item Line Defaults](#)

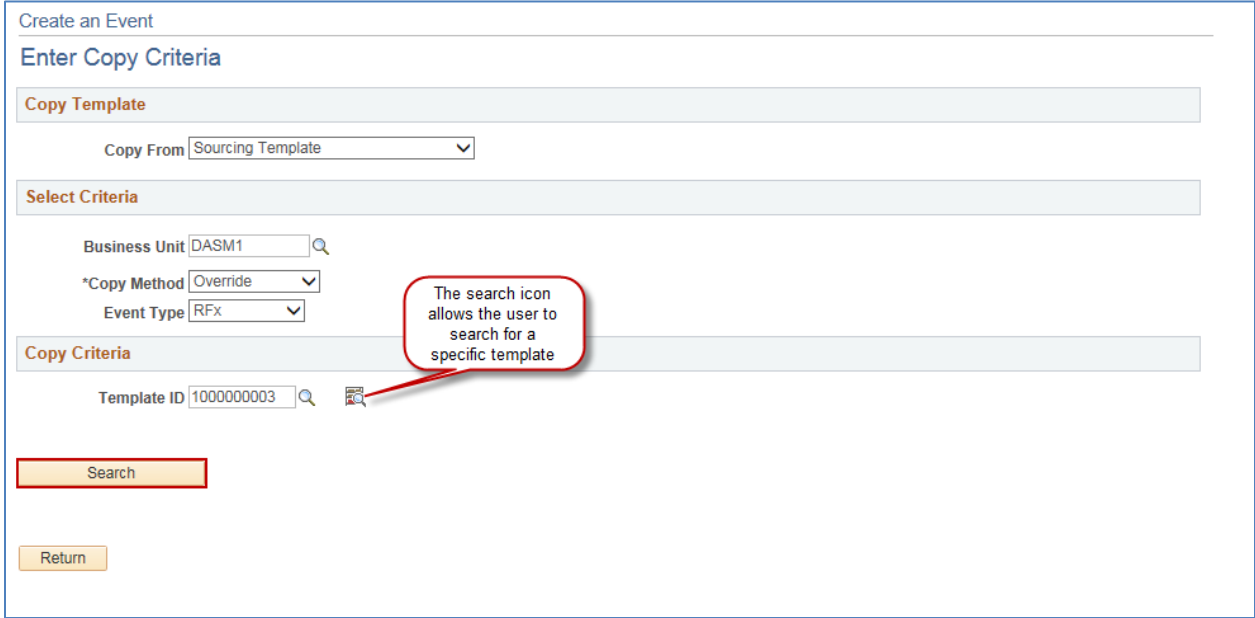
#### Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

[\\* Bidder Invitations](#)

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

3. Under **Enter Copy Criteria** enter in the following information:
  - **Copy From** Sourcing Template.
  - **Business Unit** DASM1.
  - **Copy Method** Override.
  - **Event Type** is RFx.
  - **Template ID.**
    - Click the magnifying glass next to **Template ID** to bring up a pop-up window with all available templates. Priority, Non-Priority, and any others created templates will appear. Select the appropriate template.
  - Click **Search**.



Create an Event

**Enter Copy Criteria**

**Copy Template**

Copy From

**Select Criteria**

Business Unit

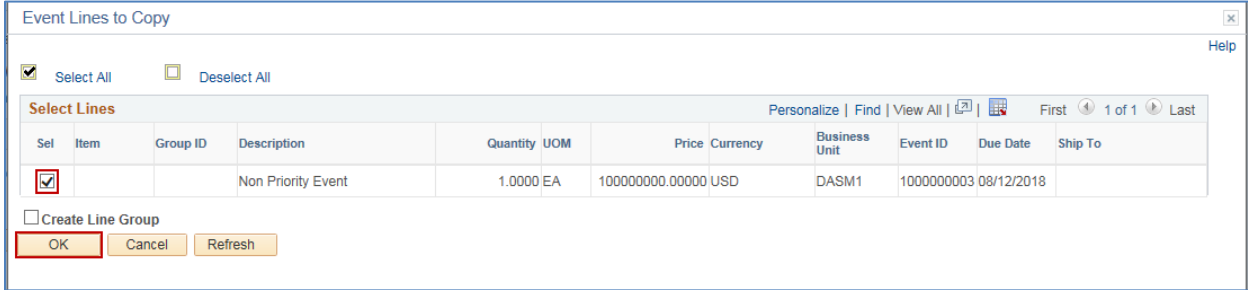
\*Copy Method

Event Type

**Copy Criteria**

Template ID

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



Event Lines to Copy

Select All  Deselect All Help

**Select Lines** Personalize | Find | View All |  |  | First 1 of 1 Last

Sel	Item	Group ID	Description	Quantity	UOM	Price	Currency	Business Unit	Event ID	Due Date	Ship To
<input checked="" type="checkbox"/>			Non Priority Event	1.0000	EA	10000000.00000	USD	DASM1	100000003	08/12/2018	

Create Line Group



The **Line Items** page is launched. It displays the name of the applied template. No changes need to be made on this page.

5. Click the **Return to Event Overview** link.

6. Scroll to the top of the page, and under **Event Summary**, populate the following information:

- **Event Name**
- **Description**
- **Preview Date and Time**
  - i. The preview date cannot be later than the Start Date. During the preview period, suppliers are allowed to click into the bid, but no changes made will be submitted. If no preview period is needed, simply put the Preview Date Time as 1 minute before the Start Date Time.
- **Start Date and Time**
- **End Date and Time**

7. Scroll down the page to **Step 1: Define Event Basics**, and click the link to **Event Settings and Options**.

- The Event Settings and Options page does not update from the template, so the user will need to review the fields, and update as appropriate.

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](#)

8. Review the fields, and update as needed for your event. When complete, click **Save Event Changes**, and navigate to Return to Event Overview.

- The following checkboxes should be CHECKED. Uncheck all other checkboxes:
  - 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
- In the **Round/Version Display** field, select “Do Not Display”.
- In the **Notification To be Sent** field, select “Specific Bidders”.
- In the **Award Template** field, select “AUC\_NOA\_1”.
- In the **Non-Award Template** field, select “AUC\_NONA\_1”.
- In the **Start Price** field, select “Display – Not Required to Beat”.

Create an Event

### Event Settings and Options

Business Unit DASM1    Event ID NEXT    Round 1    Version 1    Event Format Buy    Event Type RFx

---

Create PDF on Event Post  
 Allow Bidder XML Downloads  
 Bid Required On All Lines  
  
 Multiple Bids Allowed  
 Allow Edit of Posted Bids  
 Do Not Use Best Bids on New Rounds  
 Display Bid Factor Ideal Value  
 Allow Send NOA Notification

Round/Version Display   
  
 Sealed Event  
 Display Bid Factor Weightings  
  
 Display Bid Factor Best/Worst  
  
 \*Award Template    
 \*Non-Award Template

---

Notification To be Sent

Factor Event Score Into     Start Price

Header Weighting

Line Factor Weighting

Bidders May Create Line Groups  
 Allow Price Breaks with Groups

▼ **Minimum Response and Warning**

Minimum number of bid response     Number of days warning prior

▶ **Associated Categories**

GoTo

9. Navigate to **Step 1: Define Event Basics**, and click the link to **Event Comments and Attachments**.

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 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

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.

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

Modify an Event

---

### Event Comments and Attachments

Event ID SCP0032

Enter Comments [?](#) View All First 1 of 1 Last

Comments: + -

Please read the instructions

Send To Bidder  Include On Award Standard Comments



11. To add files, click the **Add Attachment** button to attach the Cost Estimate Worksheet and any other appropriate attachments. This is the location where OSCG&R will populate FAQs and excel sheets to support the schools application process.
  - A pop-up window will appear. Browse for the document on the computer, select it, and click the upload button.
12. Select the appropriate checkbox to “Send To Bidder” immediately and/or to include the comment “On Award”.

Modify an Event

### Event Comments and Attachments

Event ID SCP0032

Enter Comments [?](#) View All First 1 of 1 Last

Comments:

Send To Bidder  Include On Award Standard Comments

**Add Attachment**

OK Cancel Refresh

13. Enter an **Attachment Description** and choose where the attachment will be displayed.
14. Click **OK** to return to the Events Summary page.

Modify an Event

### Event Comments and Attachments

Event ID SCP0032

Enter Comments [?](#) View All First 1 of 1 Last

Comments:

Send To Bidder  Include On Award Standard Comments

Add Attachment

### Attachments [?](#) Personalize [?](#) First 1 of 1 Last

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
Cost_Estimate_Worksheet.xlsx	Cost Estimate Worksheet	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View

**OK** Cancel Refresh

15. Click on **Payment Terms and Contact Info** under **Step 1: Define Event Basics** on the **Event Summary Page**.

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

### Step 2: Configure Line Items

Create line listings for this event.

\* Line Items

Item Line Defaults



This is the **Event Contact Details** page that specifies the contact information which will be published with the event along with payment information. This information needs to be updated in every event.

- 16. Under **Payment & Currency Information:**
  - The **Bill Address** should be OSCG&R Address.
  - Enter the correct **Buyer** id.

- 17. Under **Event Contact:**
  - Enter the **Contact Name**.
  - Enter the **Email ID**.
  - Enter a **Phone number**.

18. **Save Event Changes** and **Return to Event Overview**.

Create an Event

### Event Contact Details

**Payment & Currency Information** ?

*Currency <input type="text" value="USD"/>	Exchange Rate	*Rate Type <input type="text" value="CRRNT"/>
Pay Method <input type="text"/>		Rate Date <input type="text" value="07/26/2018"/>
Payment Terms <input type="text"/>		<input type="checkbox"/> Allow bids in other currencies
<b>Bill Addr</b> <input type="text"/>		<input type="checkbox"/> Tax Exempt
<b>Buyer</b> <input type="text"/>		Exempt ID <input type="text"/>

**Event Contact** ?

<b>Contact Name</b> <input type="text" value="DAS-Dixon Michelle R"/>
<b>Email ID</b> <input type="text" value="michelle.dixon@ct.gov"/>
<b>Phone</b> <input type="text" value="860-713-6490"/>

19. Go to **Bidder Invitations** under **Step 3: Select Bidders to Invite** on the **Event Summary** page.

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.

20. 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 sixth column.
- To delete a supplier, click the **blue minus button** in the seventh column.
- To add a bidder, click **Search for Bidders** underneath the **Bidder Invitation List** table. In the pop-up window, use any of the search criteria to find the intended supplier. Check Invite column, then **Return to Invite Bidders**.

Modify an Event

**Invite Bidders**

Business Unit DASM1    Event ID 100000002    Round 1    Version 1    Event Type

Template ID PRIORITYMD    Template Type Business Unit

Public Event

**Bidder Invitation List** [?](#)    Personalize | Find | View 100 |    First 1-20 of 169 Last

Bidder ID	Bidder Type	Location	Name	*Dispatch Method		
0000000001	Supplier	MAIN	TOWN OF ANDOVER	Email		
0000000002	Supplier	MAIN	CITY OF ANSONIA	Email		
0000000003	Supplier	MAIN	TOWN OF ASHFORD	Email		
0000000004	Supplier	MAIN	TOWN OF AVON	Email		
0000000005	Supplier	MAIN	TOWN OF BARKHAMSTED	Email		
0000000006	Supplier	MAIN	TOWN OF BEACON FALLS	Email		
0000000007	Supplier	MAIN-ACH	TOWN OF BERLIN	Email		
0000000008	Supplier	MAIN	TOWN OF BETHANY	Email		
0000000009	Supplier	MAIN	TOWN OF BETHEL	Email		
0000000010	Supplier	MAIN	TOWN OF BETHLEHEM	Email		
0000000011	Supplier	MAIN	TOWN OF BLOOMFIELD	Email		
0000000012	Supplier	MAIN	TOWN OF BOLTON	Email		
0000000013	Supplier	MAIN	TOWN OF BOZRAH	Email		
0000000014	Supplier	MAIN	TOWN OF BRANFORD	Email		
0000000015	Supplier	MAIN	CITY OF BRIDGEPORT	Email		

[Search for Bidders](#)    [Save Bidders as Group](#)

[Save Event Changes](#)    GoTo  [Go](#)

*Annotations:*

- Click the download icon to export the list of bidders to Excel
- Click the arrows to scroll through the rows of bidders
- Click the minus icon to delete a bidder
- Click the Search for Bidders link to add additional bidders
- Click the icon to view bidder details

21. Click Return to Event Overview.

22. If the event is not ready to be posted, simply **Save Event**. Otherwise, the **Post** button is directly underneath.

**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 any bidder invitations you may have defined.

Save Event      Save As Template  
Post      Preview PDF

23. A message will pop-up stating that: “This will submit the Event for Approval”.  
Click **OK**.

- Events will not be routed for approval, and will immediately be posted.

Message

This will submit the Event for Approval. (18058,207)

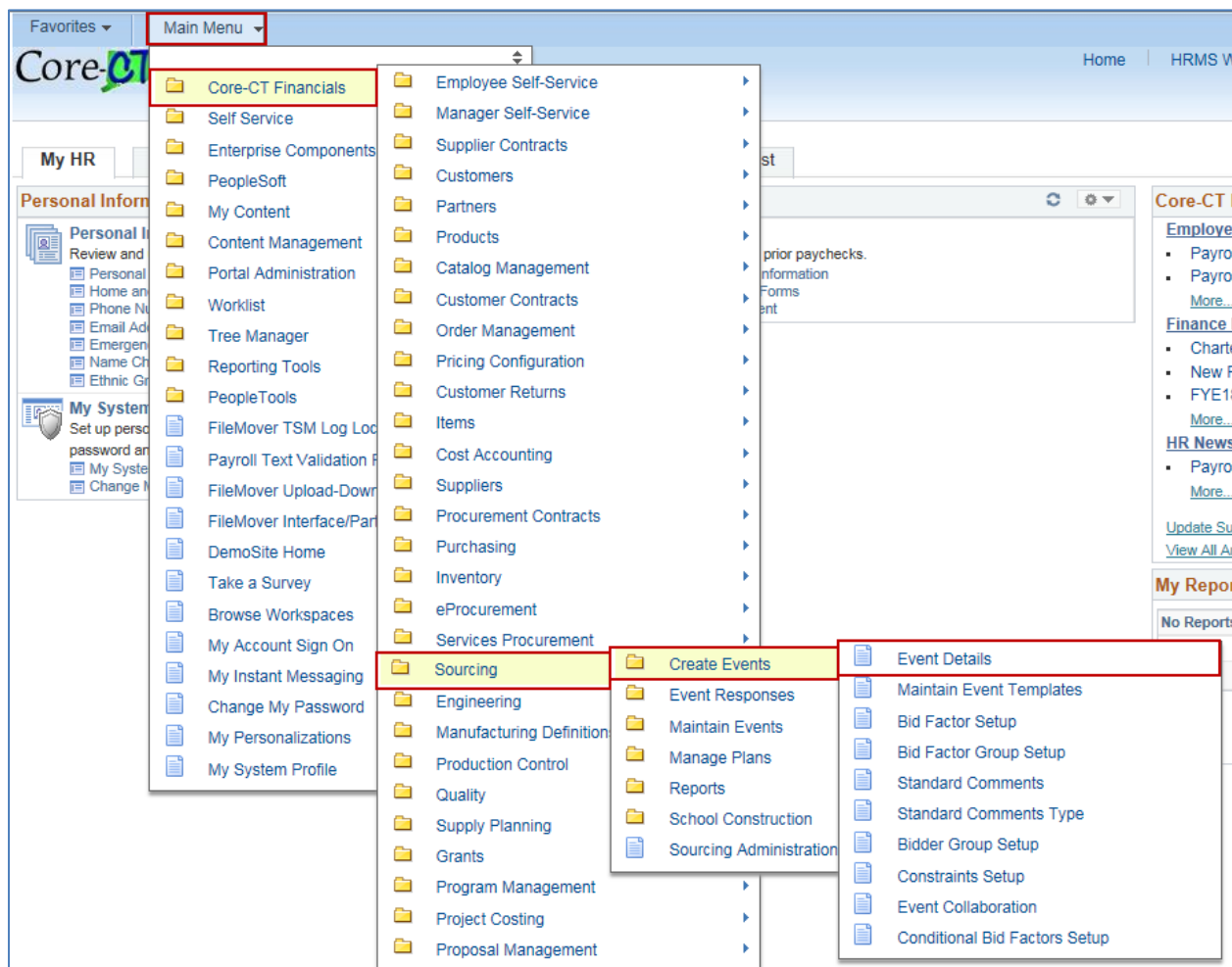
Once the event is approved and posted you will be limited to the changes that you can make to the event. Click OK to continue or Cancel if you are not done making changes to the event.

OK      Cancel

## 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:** *Main Menu > Core-CT Financials > Sourcing > Create Events > Event Details*



1. Go to the “**Find an Existing Value**” tab.

- Enter the **Business Unit** DASM1, and any other search parameters needed.
- Click **Search**.
- Click the hyperlink to open the event.

**Create Events**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** Add a New Value

▼ Search Criteria

Business Unit = ▼ DASM1 🔍

Event ID begins with ▼

Event Round = ▼

Event Version = ▼

Event Format = ▼

Event Type = ▼

Event Name begins with ▼

Event Status = ▼

Case Sensitive

Limit the number of results to (up to 300): 300

**Search** Clear Basic Search Save Search Criteria

**Search Results**

View All First 1-84 of 84 Last

Business Unit	Event ID	Event Round	Event Version	Event Format	Event Type	Event Name	Event Status
DASM1	SCP0063	1	1	Buy	RFx	hi	Open
DASM1	SCP0062	1	1	Buy	RFx	Non Priority2	Posted
DASM1	SCP0061	1	1	Buy	RFx	test_tob_2018-0828	Open

2. Edit the needed fields.
3. Click **Save Event**.
4. If the event has not been posted, click **Post** to open the event to the school districts.
5. If the event has been posted, you will receive a pop up message to determine 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](#)

#### 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 any bidder invitations you may have defined.

[Save Event](#)

[Save As Template](#)

[Post](#)

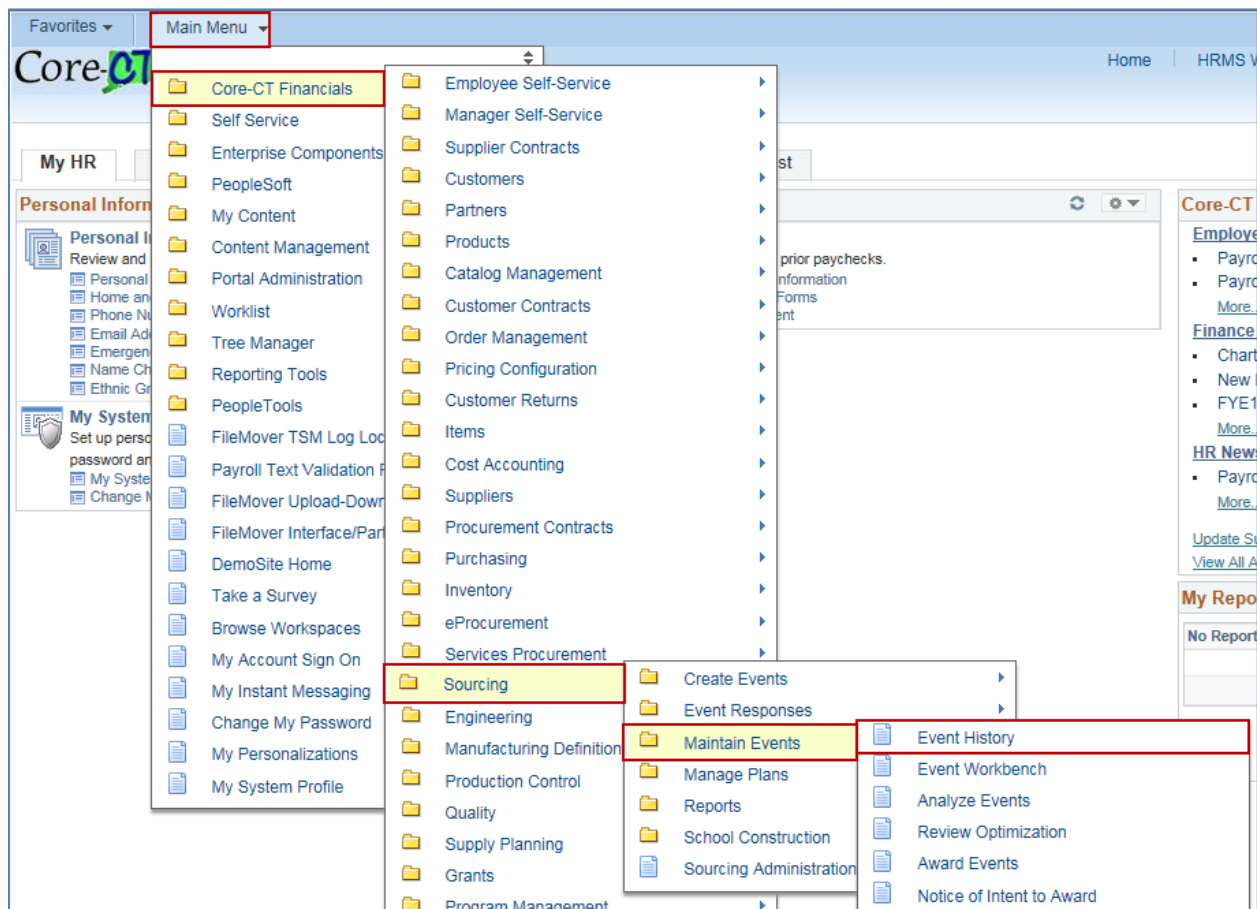
[Preview PDF](#)



## 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 a number of event-related actions including analyzing bids.

**Navigation:** *Main Menu > Core-CT Financials > Sourcing > Maintain Events > Event History*



1. Search under **Find an Existing Value** by entering the appropriate parameters, such as DASM1 in the Business Unit field.
2. Scroll through Search Results to find the event, and click any of the columns to navigate to the event history page for that event.

**Event History**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

▼ **Search Criteria**

Business Unit =

Event ID begins with

Event Round =

Event Version =

Event Format =

Event Type =

Event Name begins with

Template ID begins with

Template Type =

Allow Proxy Bidding =

Case Sensitive

Limit the number of results to (up to 300):

[Basic Search](#)

**Search Results**

View All First 1-83 of 83 Last

Business Unit	Event ID	Event Round	Event Version	Event Format	Event Type	Event Name	Template ID	Template Type	Allow Proxy Bidding
DASM1	1000000001	1	1	Buy	RFx	System Test 1	(blank)	(blank)	No
DASM1	1000000002	1	1	Buy	RFx	priority	PRIORITYMD	Bus Unit	No
DASM1	1000000003	1	1	Buy	RFx	Priority Event	PRIORITYTR	Bus Unit	No
DASM1	1000000004	1	1	Buy	RFx	Non Priority2	NONPRIORTR	Bus Unit	No

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

- **Create Event:** Launches **Event Details**
- **Event Approval:** Event approval is not used by OSCG&R
- **Dispatch Event:** Launches **Event Details**
- **Receive Bids:** Launches **Bidder Response**
- **Analyze Bids:** Launches **Analyze Event**
- **Award Event:** Links to **Award Details**

### Event History

**Event Information**

Bus. Unit	Event ID	Event Name	Format	Type	Status
DASM1	SCP0002	Non Priority Event	Buy	RFx	Open

**Version History**

[Personalize](#) | [Find](#) | [View All](#) | [\[?\]](#)

First ⏪ 1-3 of 3 ⏩ Last

Round	Version	Event Status	Modified By		
	1	3 Open	DAS-Reault Thomas L		
	1	2 Posted	DAS-Dixon Michelle R		
	1	1 Inactive Version	DAS-Dixon Michelle R		

**Event Stage**

Create Event

Event Approval

Dispatch Event

Receive Bids

Analyze Bids

Award Event

[Return to Search](#)