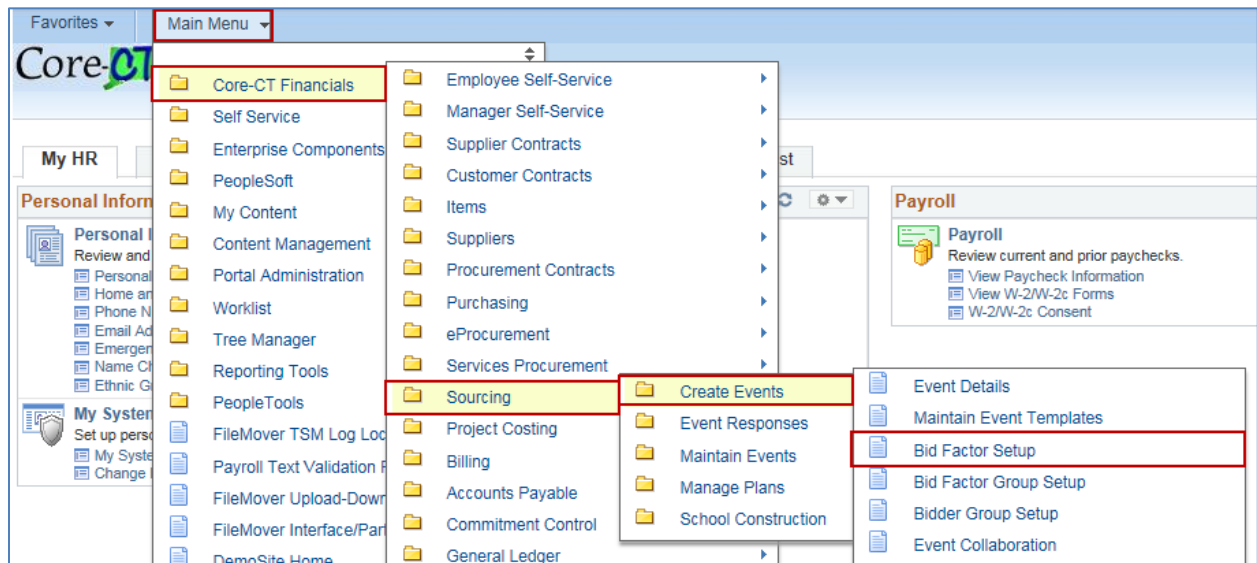


Set-up Bid Factors

Bid Factor is the Strategic Sourcing term for a question used to define a bid. These are the application questions that suppliers will fill-out about their construction projects when they are requesting a construction grant. There are two levels of bid factors seen in Strategic Sourcing—headers and lines. Headers will be the initial pre-qualification questions that are a standard on all submitted applications. Line-level bid factors ask for more specific detail and are the project type-specific questions.

Navigation: *Main Menu > Core-CT Financials> Sourcing > Create Events > Bid Factor Setup*



1. Go to the “**Add New Value**” tab.
 - Enter the **SetID** as STATE.
 - Name a unique **Bid Factor Code** .
2. Click **Add**.

Navigation: Favorites ▾ Main Menu ▾ > Core-CT Financials ▾ > Sourcing ▾ > Create Events ▾ > Bid Factor Setup

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Bid Factor Setup

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

SetID 🔍

Bid Factor Code

Add

This is the **Bid Factor Setup** page where the information making up the bid factor will be specified.

3. Fill-out the Bid Factor information:

- Effective Date: Typically set to 1/1/1900, but can be entered as a current date if a new row is added for an updated question.
- Default Weighting: Left Blank as OSCG&R does not utilize this field.
- Fill-out the Bid Factor Type:
 - i. Attachment: Requires additional documentation
 - ii. Date: Has a date-format response
 - iii. List: Respondent chooses from a list of possible responses; An open table will appear to provide the choices
 - iv. Monetary: Has a monetary-format response
 - v. Numeric: Has a numeric-format response
 - vi. Separator: Exists as a separator on the application
 - vii. Text: Accepts a free-form text response
 - viii. Yes/No: Only has Yes or No as answer choices

- Complete the **Description**
- Compose the **Question**
- If required, check the box for **Bid Factor Response Required**
- Check the box for **Display to Bidders**
- Uncheck the box for **Ideal Response Required**

4. Assign BU's (Business Unit) and Departments under Cost Contribution

- In the pop-up window, type DASM1 under **Business Unit**
- Click **OK**.

Assign Business Units and Departments to Bid Factor

SetID STATE Bid Factor Code CT_OSCGR_SCHDL_7D

Type Yes/No Description Improper roof

Question Schedule 7 - Q4: Was your roof improperly designed or constructed?

Assign Business Units Personalize | View All | First 1 of 1 Last

*Business Unit

DASM1

Assign Departments Personalize | View All | First 1 of 1 Last

*Department

OK Cancel

5. Depending on the type of Bid Factor, other set up may be required, such as Unit of Measure. For example, for a Date Bid Factor, you can select the “Best” and “Worst” date.

Bid Factor Setup

SetID STATE Bid Factor Code CT_OSCGR_SCHDL_XX

Bid Factor ? Find | View All | First 1 of 1 Last

*Effective Date 09/21/2018

Status Active

*Type Date

*Question

Currency

Best Worst

Bid Factor Response Required Ideal Response Required

Display to Bidder

Cost Contribution ?

6. Click Save.

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Bid Factor Setup

SetID STATE Bid Factor Code BID_PRICE

Bid Factor ? Find | View All First 1 of 1 Last

*Effective Date 01/01/1900 Price Bid Factor

Status Active Default Weighting

*Type Monetary *Description Bid Price

*Question What is your Bid Price

Price Components			Personalize	Find	View All	First	1 of 1	Last
Component	UOM	Weighting						
1		0.00000						

Currency USD US Dollar

Bid Factor Response Required Ideal Response Required

Display to Bidder

Cost Contribution ?

[Assign Defaulting Rules](#) [Assign Response Query](#)
[Assign BU's and Departments](#) [Assign Agreements](#)
[Assign Clauses](#)

Save | Return to Search | Previous in List | Next in List | Add | Update/Display | Include History | Correct History

Click the + to add a new effective dated row, or the - to remove a row.

Set-up Bid Factors Groups

Since bid factors are often answered together, they can be organized into named groups based on their purpose (or any other means of categorization). For example, the pre-qualification questions and project type-specific questions would be bid factor groups. Having multiple bid factors in a group means that when any part of the system calls on the group, this will refer to all the factors within it.

All Bid Factors must be set up before creating Bid Factor Groups.

Navigation: *Main Menu > Sourcing > Create Events > Bid Factor Group Setup*

1. Go to the “**Add New Value**” tab.
 - Enter the **SetID** as STATE.
 - Name a unique **Bid Factor Group Code**.
2. Click **Add**.

Favorites ▾ Main Menu ▾ > Core-CT Financials ▾ > Sourcing ▾ > Create Events ▾ > Bid Factor Group Setup

Core-CT

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Bid Factor Group Setup

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

SetID STATE 🔍

Bid Factor Group Code Group Test

Add

This is the **Bid Factor Group** page where the bid factors making up the group will be assigned.

1. Enter the **Effective Date**.
2. Enter the **Bid Factor Group Description**.
3. Assign Bid Factors.
 - If the bid factor code is known, type the code into the **Bid Factor Code** box in the second column and add the weighting.
 - If the bid factor code is not known:
 - i. Click the magnifying glass next to the **Bid Factor Code** box in the second column.
 - ii. **Search** using the criteria of code, type, or description.
 - iii. Click the name of the code as it appears in the **Search Results**.
 - To add an additional bid factor, click the blue plus sign in the right-most column.
 - To delete a bid factor, click the blue minus sign in the right-most column.

Bid Factor Group

SetID STATE Bid Factor Group CT_OSCGR_PREQUAL

Bid Factor Group Definition Find | View All First 1 of 1 Last

*Effective Date Status + -

*Description

Weighting

Select Bid Factor Group

Assign Bid Factors				Personalize Find View All First 1-10 of 19 Last	
Seq Nbr	Bid Factor Code	Description	Weighting		
1	<input type="text" value="CT_PQ_5B"/> <input type="button" value="Q"/>	Program Types	<input type="text" value="0.00000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
2	<input type="text" value="CT_PQ_PRIORITY"/> <input type="button" value="Q"/>	CT_PQ_PRIORITY	<input type="text" value="0.00000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
3	<input type="text" value="CT_PQ_1A"/> <input type="button" value="Q"/>	Resolution 1: Superintendent	<input type="text" value="0.00000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
4	<input type="text" value="CT_PQ_1B"/> <input type="button" value="Q"/>	Date of Resolution 1	<input type="text" value="0.00000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
5	<input type="text" value="CT_PQ_2A"/> <input type="button" value="Q"/>	Resolution 2: Building committ	<input type="text" value="0.00000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
6	<input type="text" value="CT_PQ_2B"/> <input type="button" value="Q"/>	Date of resolution 2	<input type="text" value="0.00000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
7	<input type="text" value="CT_PQ_3A"/> <input type="button" value="Q"/>	Resolution 3: Schematics	<input type="text" value="0.00000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
8	<input type="text" value="CT_PQ_3B"/> <input type="button" value="Q"/>	Date of resolution 3	<input type="text" value="0.00000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
9	<input type="text" value="CT_PQ_4A"/> <input type="button" value="Q"/>	Town meeting minutes	<input type="text" value="100.00000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
10	<input type="text" value="CT_PQ_6A"/> <input type="button" value="Q"/>	Monetary value of local fundin	<input type="text" value="0.00000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Total Weighting

100.00000

Assign Business Units and Departments Assign Additional Defaults and Rules

Use this dropdown to activate or deactivate a Bid Factor Group

Click Refresh to ensure the total weighting equals 100

4. Click the link at the bottom of the page to Assign Business Units and Departments
 - In the pop-up window, type DASM1 under **Business Unit**
 - Click **OK**

Assign Business Units and Departments to Group

SetID STATE Group Code CT_OSCGR_PREQUAL

Description OSCG&R Pre-Qual Priority

Assign Business Units Personalize | [?] First 1 of 1 Last

*Business Unit

DASM1 [Search] [+] [-]

Assign Departments Personalize | [?] First 1 of 1 Last

*Department

[Search] [+] [-]

OK Cancel

5. Click **Save** to complete the set up of the Bid Factor Group.

Bid Factor Group

SetID STATE Bid Factor Group CT_OSCGR_PREQUAL

Bid Factor Group Definition Find | View All First 1 of 1 Last

*Effective Date 01/01/1900 [?] Status Active [v] [?] [-]

*Description OSCG&R Pre-Qual Priority

Weighting 100.00000

Select Bid Factor Group

Assign Bid Factors Personalize | Find | View All | [?] First 1-10 of 19 Last

Seq Nbr	Bid Factor Code	Description	Weighting		
1	CT_PQ_5B	Program Types	0.00000	[+]	[-]
2	CT_PQ_PRIORITY	CT_PQ_PRIORITY	0.00000	[+]	[-]
3	CT_PQ_1A	Resolution 1: Superintendent	0.00000	[+]	[-]
4	CT_PQ_1B	Date of Resolution 1	0.00000	[+]	[-]
5	CT_PQ_2A	Resolution 2: Building committ	0.00000	[+]	[-]
6	CT_PQ_2B	Date of resolution 2	0.00000	[+]	[-]
7	CT_PQ_3A	Resolution 3: Schematics	0.00000	[+]	[-]
8	CT_PQ_3B	Date of resolution 3	0.00000	[+]	[-]
9	CT_PQ_4A	Town meeting minutes	100.00000	[+]	[-]
10	CT_PQ_6A	Monetary value of local fundin	0.00000	[+]	[-]

Total Weighting

Refresh 100.00000

Assign Business Units and Departments Assign Additional Defaults and Rules

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History