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PeopleSoft Strategic Sourcing 9.1 PeopleBook

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PeopleSoft Strategic Sourcing 9.1 PeopleBook
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PeopleSoft Strategic Sourcing Preface

This preface discusses:

- Oracle's PeopleSoft products.

- PeopleSoft application fundamentals.

- Pages with deferred processing.

- Common elements in this PeopleBook.

- PeopleSoft standard field definitions.

- PeopleSoft Strategic Sourcing standard terms.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook.

Oracle's PeopleSoft Products

This PeopleBook refers to these products:

- PeopleSoft Manufacturing

- PeopleSoft Engineering

- PeopleSoft Supply Planning

- PeopleSoft Purchasing

- PeopleSoft Supplier Contract Management

- PeopleSoft Asset Management

PeopleSoft Application Fundamentals

The *PeopleSoft Strategic Sourcing PeopleBook* provides you with implementation and processing information for your PeopleSoft Strategic Sourcing system. However, additional, essential information describing the setup and design of your system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of this PeopleBook.

See Also

PeopleSoft Application Fundamentals PeopleBook

Pages with Deferred Processing

Several pages in PeopleSoft Strategic Sourcing operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value you enter before the system updates the page overrides the default.

Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page. For example, on the Line Bid Response page, the extended price and currency conversion do not display until you click the Recalculate button or otherwise refresh the page.

See Also

PeopleTools PeopleBook: PeopleSoft Application Designer Developers Guide

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

• Understanding the PeopleSoft online library and related documentation.

• How to send PeopleSoft documentation comments and suggestions to Oracle.

• How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.

• Understanding PeopleBook structure.

• Typographical conventions and visual cues used in PeopleBooks.

• ISO country codes and currency codes.

• PeopleBooks that are common across multiple applications.

• Common elements used in PeopleBooks.

• Navigating the PeopleBooks interface and searching the PeopleSoft online library.

• Displaying and printing screen shots and graphics in PeopleBooks.

• How to manage the locally installed PeopleSoft online library, including web site folders.

• Understanding documentation integration and how to integrate customized documentation into the library.

- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Common Elements Used in This PeopleBook

Bid	A submission of an offer on an event.
Bid Factor	An element of an event, that may or may not be cost-related, which factors into the award of an event. Bid factors can be assigned weightings and used to determine the best bid.
	Examples of bid factors include price, product warranties, service level agreements, and defect ratings.
Bidder	Anyone registered to place a bid on an event. The term *bidder* applies whether it is a sell event or a buy event.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Buy Event	In a buy event, the event creator wants to buy goods or services. In addition to price, the creator may specify other bid factors and assign weightings, which factors into the award decision. Bidders must submit their bids, including responses to the bid factors, by a specified End Date at which time the bids are evaluated and the event is awarded. In PeopleSoft Strategic Sourcing, there are three types of buy events:
	Auction: Also known as a reverse auction. All bids are visible to all bidders. Bidders can enter multiple bids, to beat the current highest-scoring bid.
	RFx: Also known as a request for quote. Each bidder submits one bid by the specified End Date, at which time the bids are evaluated and the event is awarded. Bidders never see others' bids but the event creator can see all bids throughout the event.
	Sealed RFx: Similar to RFx events, yet also restricts the event creator from viewing the bids until after the event has ended.
Competitive Bid	An event in which bidders can view each others' scores and bid as often as they want to submit the winning score.
End Date	The date and time the event closes meaning that bids are no longer accepted.
Event Creator	The originator of the event.
Extension Period	The length of time an auction event is extended. Events can be extended if a bidder posts a bid at the last minute. Extensions are used to keep bidding fair by allowing bidders time to respond to the last minute bid.

Factor Type	The type of information being requested on the bid factor, such as monetary, numeric, date, text, yes/no, list, or separator.
Preview Date	The time available before an event's start date. During preview, bidders may view the event, and may enter bid data into the system but not post it. Having a preview time for an event is optional.
Public Event	An event on which any person or organization may bid.
Reserve Price	The monetary amount that the event creator is willing to accept. When the event reaches Award status, the system warns the event creator if the highest scoring bid does not meet the reserve price. The user can still choose to award the event.
	For a sell event, the reserve price is the minimum acceptable; for a buy event, it is the maximum acceptable.
RFx	A request for information or request for quote event in which each bidder bids once; bidders cannot see each others' bids and scores.
Sell Event	Most familiarly known as an *auction.* In a sell event, the event creator offers a good or service for sale. In addition to price, the creator may specify other bid factors which helps determine the award decision. Bidders must submit their bids, including responses to the bid factors, by a specified end date at which time the bids are evaluated and the winners are declared. In PeopleSoft Strategic Sourcing, there are two types of sell events:
	Auction: All bids and scores are visible to all bidders. Bidders can enter multiple bids, to beat the current highest-scoring bid.
	RFx: Each bidder submits one bid by the specified end date, at which time the event creators evaluates bids and awards the event. Bidders never see others' bids but the event creator can see all bids throughout the event.
SetID	An identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define your organization's structure and processing options.
Start Date	The date and time at which the event becomes open for bidding.
User ID	The system identifier for the individual who generates a transaction.
Weighting	Both bid factors and line items are weighted to reflect their level of importance. Weighting is used to analyze and score bids.

Chapter 1

Getting Started with PeopleSoft Strategic Sourcing

This chapter provides an overview of PeopleSoft Strategic Sourcing and discusses:

- Business processes

- Roles

- Integrations

- Implementation

PeopleSoft Strategic Sourcing Overview

PeopleSoft Strategic Sourcing facilitates collaboration between buyers and suppliers of goods and services. Through PeopleSoft Strategic Sourcing events, you increase investment recovery through the sale of depreciated assets, and reduce costs by accepting competitive bidding for goods and services.

With this application, you can:

- Establish bid factors on which to score events.

- Establish business policies and constraints on which to base the sourcing awards.

- Create events and invite bidders to participate in them.

- Collaborate on events and event analysis with others in the enterprise.

- Enable new bidders to register to bid.

- Enable bidders to enter their bids online.

- Negotiate bids by creating multiple rounds and versions.

- Optimize bids to determine an ideal award

- Score bids and award the events.

- Use workflow processes to enable approvals and notifications throughout the event life cycle.

PeopleSoft Strategic Sourcing Business Processes

PeopleSoft Strategic Sourcing buy events are part of the Source to Settle business process. The following diagram shows the high-level business process from creating a sourcing offer to creating purchase orders or purchase order contracts.
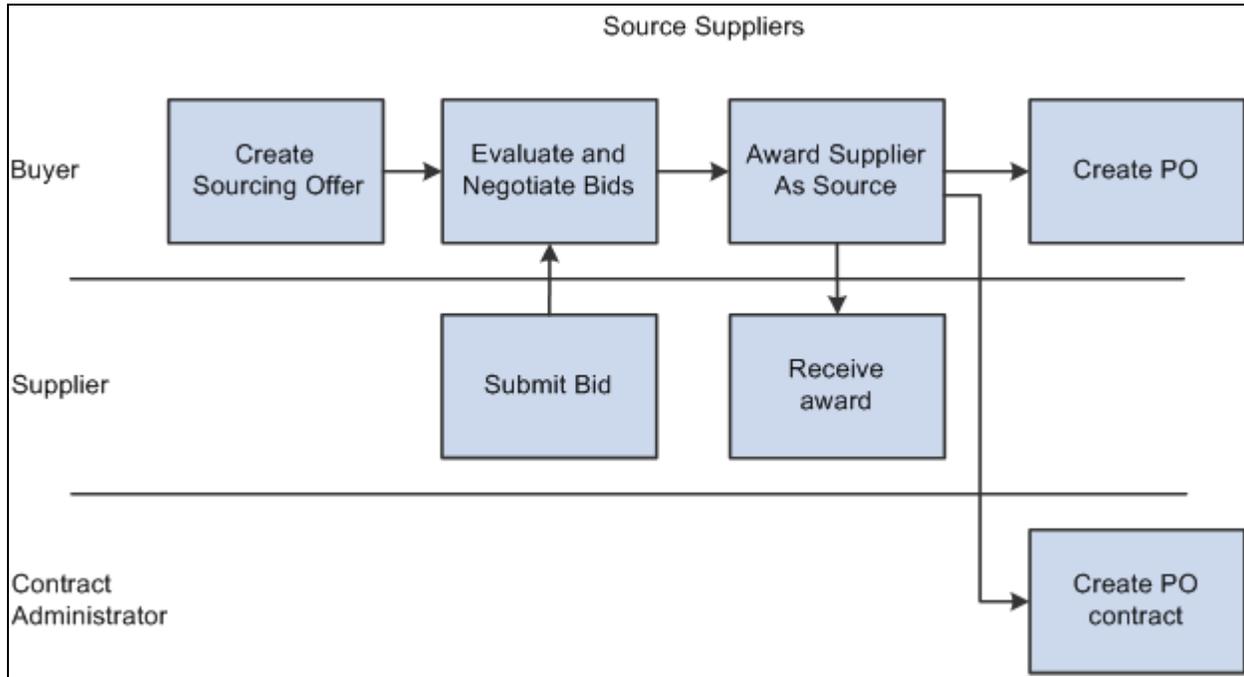
Strategic Sourcing high-level business process for source suppliers

Buy Events

The following diagram illustrates the high-level process used for PeopleSoft Strategic Sourcing buy events and shows the interactions between buyers and sellers.
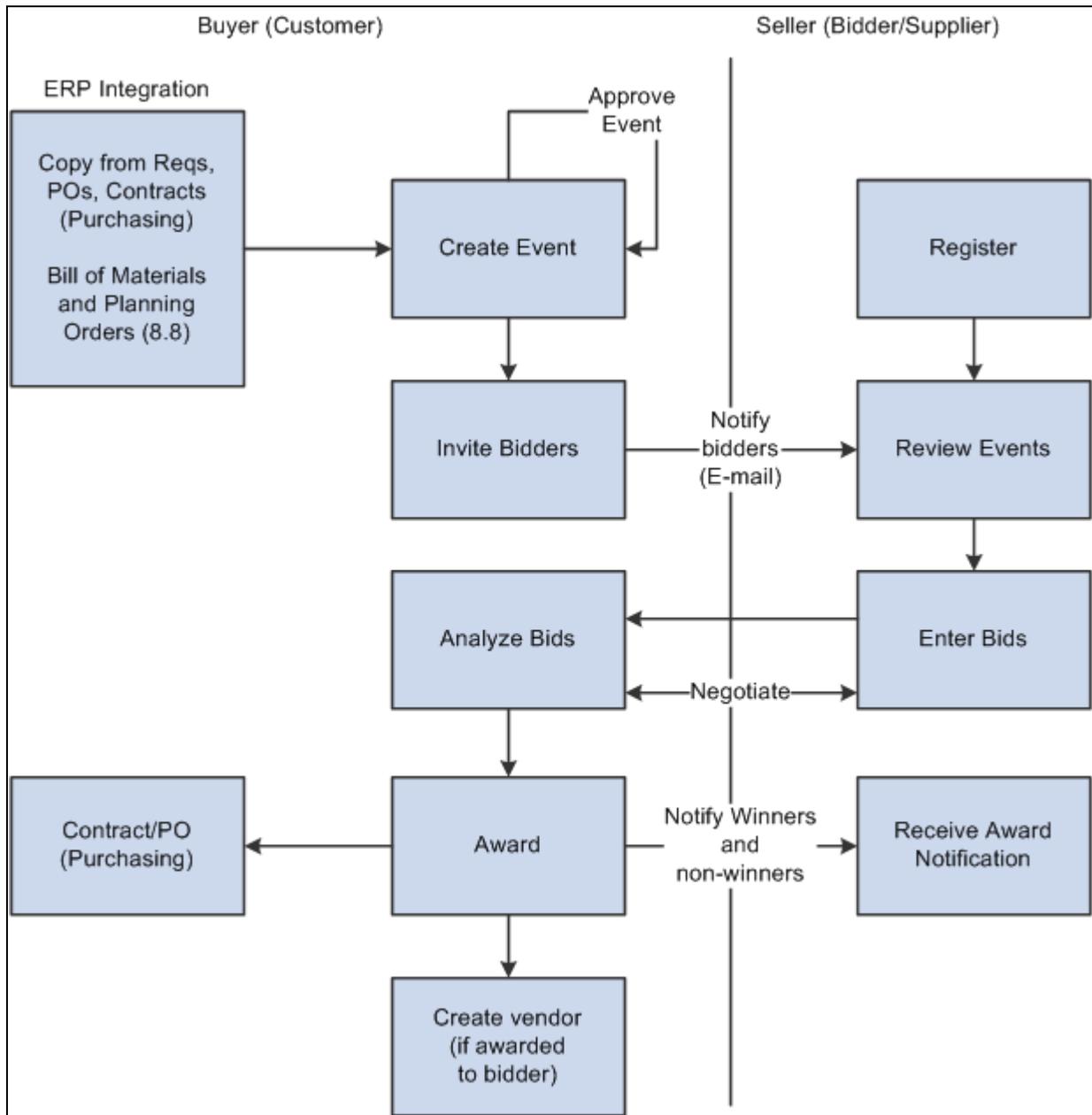
PeopleSoft Strategic Sourcing buyer and seller buy event process flow

1. The buyer creates an event, and optionally copies from an existing event, an event template, requisitions, purchase orders, contracts, Manufacturing bills of material (BOMs), Engineering BOMs, or planned orders.

    The buyer includes bid factors and business constraints, and invites bidders.

2. Optionally, the buyer invites collaborators to give input to the event, reviews the input, and posts the event based on the input.

3. Bidders register, review the event, and submit their bids.

    _____

    Note. Suppliers that exist as vendor users and have been granted the appropriate roles and permissions to bid do not need to register.

    _____

4. The buyer evaluates the bids manually or uses the optimization engine, and can create another round of the event to solicit more bids.

5. Optionally, the buyer invites collaborators to give input on the bids and bidders.

6. The buyer awards the winning bid, and the system notifies the winners and nonwinners.

7. The buyer either creates a purchase order or contract to order the goods or services from the awarded bidder.

   If the bidder isn't previously a vendor, the system creates a record for the bidder in the vendor table.

Sell Events

The following diagram illustrates the process flow of PeopleSoft Strategic Sourcing sell events from creating events to awarding events.
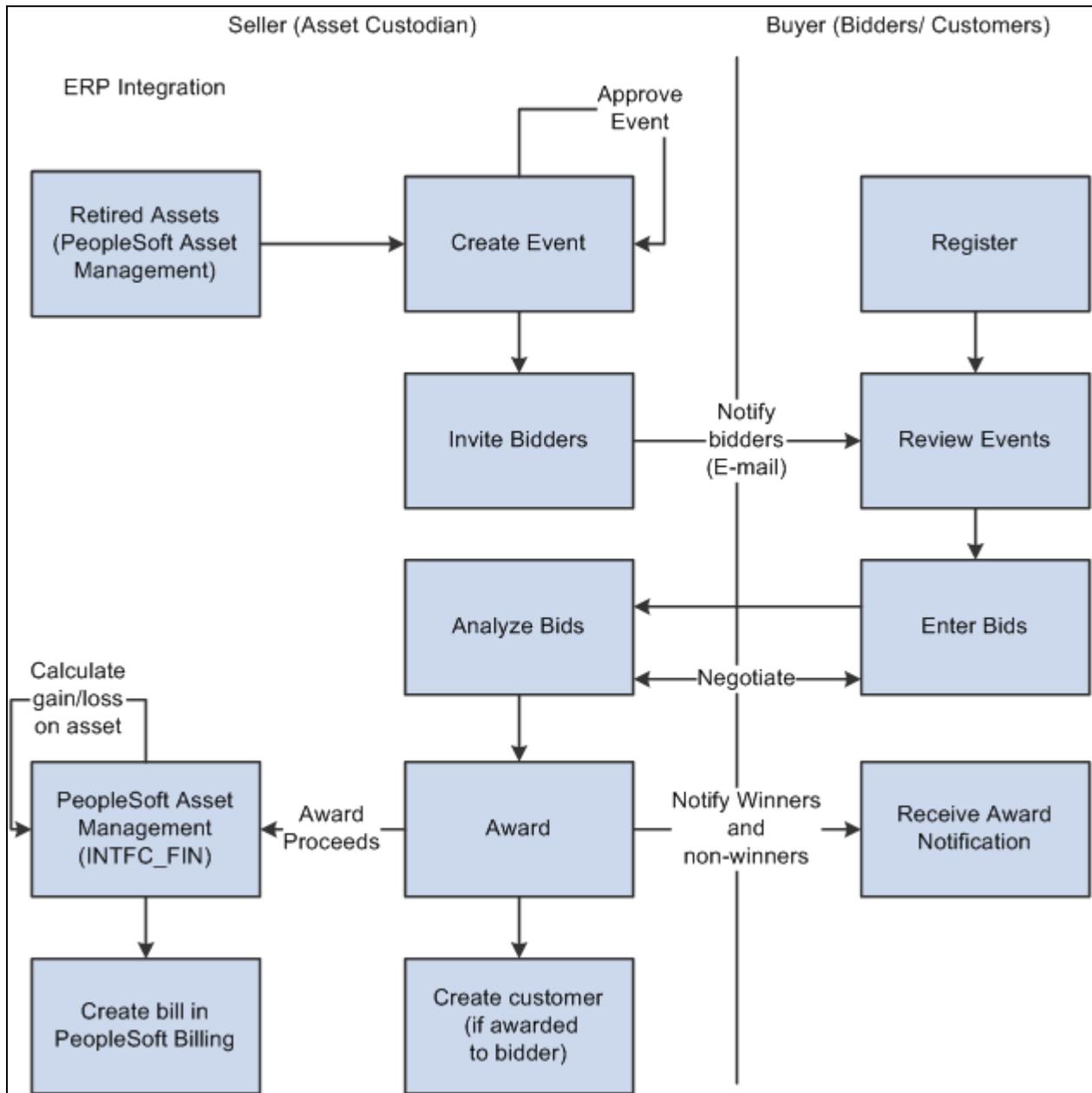
PeopleSoft Strategic Sourcing seller and buyer sell event process flow

1. The seller creates an event by selecting depreciated assets. The seller optionally includes bid factors, and invites bidders or customers.

2. Optionally, the seller invites collaborators to give input to the event, reviews the input, and posts the event based on the input.

3. Bidders register, review the event, and submit their bids.

   Note. Customers that exist as customer users and have been granted the appropriate roles and permissions to bid do not need to register.

4. The seller evaluates the bids based on the bid factors, and can create another round of the event to solicit more bids.

5. Optionally, the seller invites collaborators to give input on the bids and bidders.

6. The seller awards the winning bid.

7. The system notifies PeopleSoft Asset Management of the sale, and PeopleSoft Asset Management notifies PeopleSoft Billing to bill the customer.

Note. If you create a sell event with an item added by description, thus without selecting an asset, there is no link to PeopleSoft Asset Management. Therefore, no transaction occurs when the event is awarded and the only way to bill the awarded bidder is by manually creating a bill in PeopleSoft Billing.

Event Types

This table describes recommended event types for specific situations:

Situation	Recommended Event Format/Type
Information gathering for a future request for proposal.	RFI (request for information)
Selling depreciated assets. You award the event to the highest bidder.	Sell/Auction price-only event. You select the bidders competeOn the Basis of Price option on the Header Details page to create a price only sell event. You can optionally select to allow Proxy Bidding on the auction event.
A reverse auction where price is not the only consideration. You award the event to bidder with the best score.	Buy/Auction event. You select the bidders compete On the Bases of Score option on the Header Details page and add additional line bid factors to create a score based buy auction event.
A complex purchase with many bid factors, such as a large procurement for a government agency. Bidders don't actively bid against one another, but instead submit their best overall bid.	Buy/RFx event. Optionally, you can create multiple rounds to negotiate further with selected bidders.

Roles

We deliver PeopleSoft Strategic Sourcing with the following internal default roles:

• Event Administrator: The Strategic Sourcing System Administrator.

• Event Approver: Users who will approve sourcing events.

• Event Buyer/Seller: Users who will create buy or sell sourcing events.

• Event Collaborator: Users who will provide input on the creation, award, or both of sourcing events.

• Plan Owner: Users who will create sourcing project plans.

• Plan Approver: Users who will approve sourcing project plans.

• Task Owner: Users who will be assigned sourcing project plan tasks.

We deliver PeopleSoft Strategic Sourcing with the following external default roles:

- Event Bidder: Businesses or individuals with whom the enterprise has not previously done business.

- Event Customer: Businesses or individuals to whom an enterprise has sold before.

- Event Vendor: Businesses from which an enterprise has purchased before.

- Event Guest: Default role for guest users who have not yet registered as bidders.

See Also

Role-Related Tasks

Event Administrators perform the following tasks:

1. Set up the Strategic Sourcing business unit.

2. Set up bidder registration.

3. Set up bidder self-categorization trees.

4. Set up the file attachment server.

5. Set up discussion forums.

6. Set up chats using the MultiChannel Framework.

7. Review and approve bidder registration requests if registration approvals are selected.

Event Approvers perform the following tasks:

1. Receive workflow notifications of ending events.

2. Approve or disapprove events.

Event buyers and sellers perform the following tasks:

1. Create bid factors.

2. Create global policies and constraints.

3. Create events and invite bidders.

4. Invite collaborators (optional).

5. Monitor their event and, if necessary, pause the event or create another round or version.

6. Invite collaborators for event analysis.

7. Analyze the event.

8. Award a bidder.

Event Collaborators perform the following tasks:

1. Receive invitations to collaborate on event creation.

2. Check out events from the Manage Events Workbench and enter input on bid factors.

3. Receive an invitation to collaborate on event analysis.

4. Enter input on bids and bidders.

Event Bidders perform the following tasks:

1. Receive invitations to bid or express an interest in bidding.

2. Register to bid on events.

3. Submit bids.

4. View their ranking and scores during the event if the that information is available to bidders.

5. View past bidding history.

6. Manage their bidder profile.

7. Manage the categories of items and services that they are interested in selling and purchasing.

Event Vendors and Customers perform the following tasks:

1. Receive invitations to bid or express an interest in bidding.

2. Submit bids.

3. View their ranking and scores during the event if that information is available.

4. View past bidding history.

5. Manage the categories of items and services that they are interested in selling and purchasing.

Event Guest bidders perform out the following tasks:

1. View public events that are available for bidding.

2. Register to bid on public events.

Plan Owners perform the following tasks:

1. Create and manage Strategic Sourcing project plans.

2. View and manage plan tasks assigned to resources.

3. Receive notifications of changes to plans and tasks.

Plan Approvers perform the following tasks:

1. Approve or disapprove Strategic Sourcing project plans.

2. Receive notifications of changes to Strategic Sourcing project plans.

Task Owners perform the following tasks:

1. Complete plan tasks assigned by the plan owner.

2. Receive notifications of changes to plans and tasks.

PeopleSoft Strategic Sourcing Integrations

The following diagram illustrates how PeopleSoft Strategic Sourcing integrates with other applications, such as PeopleSoft Purchasing, PeopleSoft Asset Management, and PeopleSoft Billing.
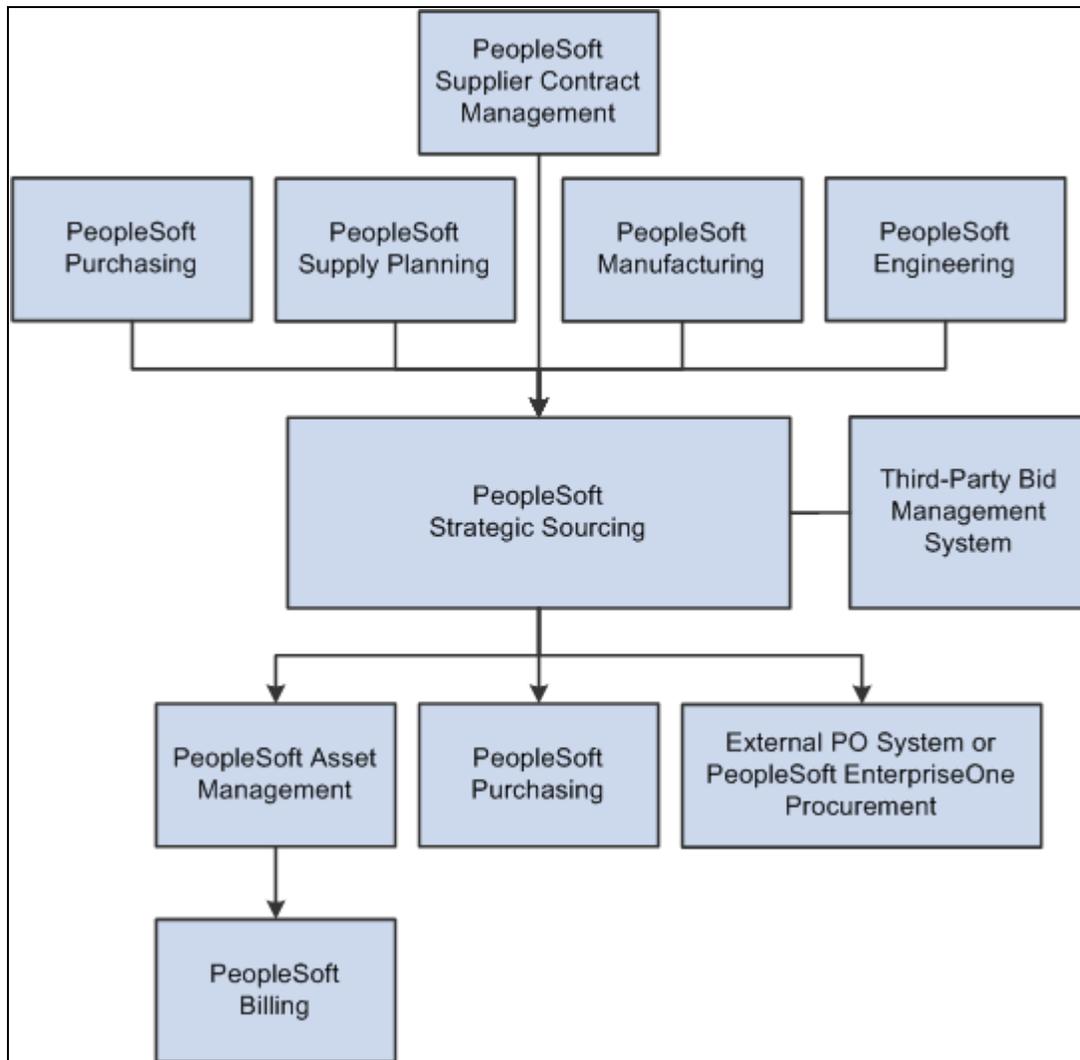
PeopleSoft Strategic Sourcing integrations

PeopleSoft Supplier Contract Management

If you have PeopleSoft Supplier Contract Management installed, you can search and associate clauses and contract agreement codes with bid factors used in sourcing events. For awarded buy events, PeopleSoft Strategic Sourcing creates contracts directly in PeopleSoft Supplier Contract Management.

PeopleSoft Manufacturing and PeopleSoft Engineering

PeopleSoft Strategic Sourcing can base buy and sell events on items from PeopleSoft Engineering BOMs and PeopleSoft Manufacturing BOMs.

PeopleSoft Supply Planning

PeopleSoft Strategic Sourcing can base buy and sell events on items from PeopleSoft Supply Planning planned orders.

PeopleSoft Purchasing

PeopleSoft Strategic Sourcing can base buy events on items from PeopleSoft Purchasing requisitions, purchase orders, and contracts. For awarded buy events, PeopleSoft Strategic Sourcing creates contracts or purchase orders directly in PeopleSoft Purchasing.

PeopleSoft Asset Management

PeopleSoft Asset Management provides assets for sell events.

For analyzed and awarded sell events, PeopleSoft Strategic Sourcing passes awards to PeopleSoft Asset Management to record the proceeds from the sale of the asset. PeopleSoft Asset Management then integrates with PeopleSoft Billing to bill the customer for the sale.

PeopleSoft One Procurement

You can use PeopleSoft Strategic Sourcing to create and manage sourcing events and to integrate the awards into PeopleSoft One Procurement.

When awarding a buy event to an external purchasing system, the system creates an outbound purchase order message at the time of the award. No sourcing information is passed into PeopleSoft Purchasing. An inbound message from PeopleSoft One provides PeopleSoft Strategic Sourcing with the purchase order ID number from the external system for tracking purposes.

Third-Party Bid Management Systems

PeopleSoft Strategic Sourcing enables users to post events and subsequent changes to third-party bid management systems, and it can send event cancellation notices to the third-party systems. Bidders created in third-party systems can be sent to PeopleSoft Strategic Sourcing to be defined as Sourcing bidders. Third-party systems can send bid responses to PeopleSoft Strategic Sourcing, and PeopleSoft Strategic Sourcing can send post-award information to third-party systems for events originally posted to the third-party systems.

See Also

Implementing PeopleSoft Strategic Sourcing

PeopleSoft Setup Manager enables you to review a list of setup tasks for your organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

PeopleSoft Strategic Sourcing also provides component interfaces to help you load data from the existing system into PeopleSoft Strategic Sourcing tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

Component	Component Interface	Reference
Location	LOCATION_TBL_CI	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Setting Up Locations.
Item Groups	INV_ITEM_GROUPS_CI	See *PeopleSoft Managing Items 9.1 PeopleBook*, "Defining Item Control Values," Assigning Items to Groups.
Department	DEPT_CF	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.
Alternate Account	ALTACCT_CF	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.
Budget Scenario	BUDGET_SCENARIO	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.
Budget Reference	BUDGET_REF_CF	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.

Component	*Component Interface*	*Reference*
ChartField1	CHARTFIELD1	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.
ChartField2	CHARTFIELD2	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.
ChartField3	CHARTFIELD3	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.
Class	CLASS_CF	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.
Fund	FUND_CF	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.
Account	ACCOUNT_CF	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.
Operating Unit	OPER_UNIT_CF	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.
Product	PRODUCT_CF	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.
Program	PROGRAM_CF	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.

Component	Component Interface	Reference
Project	PROJECT_CF	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.
Statistics Code	STATISTICS_CODE	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields," Entering and Maintaining ChartField Values.
Ultimate Use Code	SUT_USE_CI	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Defining Additional Common Information.
Reason Codes	REASON_CD_CI	See Chapter 3, "Preparing to Implement PeopleSoft Strategic Sourcing," Setting Up Reason Codes, page 42.
Ship Via Codes	SHIP_VIA_CD_CI	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Defining Additional Common Information.
Item Load from Excel	IN_MST_ITM_XLS	See *PeopleSoft Managing Items 9.1 PeopleBook*, "Loading Items," Using the Excel-to-Component-Interface Utility.
Sales and Use Tax Authorities	TAX_AUTHORITY_CI	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Defining Sales and Use Tax Authorities and Codes.
Sales and Use Tax Codes	TAX_CODE_CI	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Defining Sales and Use Tax Authorities and Codes.

Component	Component Interface	Reference
Vendor	EM_VENDOR_CI	See *PeopleSoft Source-to-Settle Common Information 9.1 PeopleBook*, "Maintaining Vendor Information," Entering Vendor Identifying Information.
Contact Information	CONTACT_INFO	See *PeopleSoft Order to Cash Common Information 9.1 PeopleBook*, "Maintaining Contacts," Setting Up Contacts.
Item Ship to Locations	ITM_SHIPTO_VNDR_CI	See *PeopleSoft Purchasing 9.1 PeopleBook*, "Defining Purchasing Item Information," Selecting Vendors Based on Item Ship To and Item Vendor Locations.
Universal Item Identifiers	ITM_MFG_UPN_CI	See *PeopleSoft Managing Items 9.1 PeopleBook*, "Working with Items," Using Universal Item Identifiers.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Application Fundamentals PeopleBook,* with information about where to find the most current version of each.

See Also

PeopleSoft Application Fundamentals 9.1 PeopleBook, "PeopleSoft Application Fundamentals PeopleBook Preface"

PeopleTools PeopleBook: PeopleSoft Setup Manager

PeopleTools PeopleBook: PeopleSoft Component Interfaces

Chapter 2

Setting Up Business Units in PeopleSoft Strategic Sourcing

This chapter provides an overview of business units in PeopleSoft Strategic Sourcing and discusses how to define Strategic Sourcing business units.

Understanding Business Units in PeopleSoft Strategic Sourcing

This section discusses:

- Strategic Sourcing business units.

- Event dates.

Strategic Sourcing Business Units

A business unit is an operational subset of an organization. It tracks and maintains its own set of events and their respective awards.

When you create business units for events, you can set the defaults for event dates and times.

If you are using PeopleSoft Purchasing, synchronize the setIDs between the business units of both applications to ensure that purchase orders and contracts are correctly created when you award events. Specifically, the same setID should be used for the following record group IDs:

- FS_38 (vendors)

- FS_26 (locations)

- DS_02 (freight and shipping codes)

- FS_18 (items)

- PO_04 (ship to addresses)

- FS_18 (item categories)

You map the PeopleSoft Purchasing business unit to the Strategic Sourcing business unit on the Purchasing business unit setup page. This enables you to associate multiple Purchasing business units with the same Strategic Sourcing business unit, which facilitates consolidating requisitions across multiple Purchasing business units.

See *PeopleSoft Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options."

Event Dates

The formal dates within each event consist of the calendar date and the time of day, for example, 02/14/2005 9:49AM PST.

Four dates exist for each event:

*   *Create:* The date when you create the event, before it goes through the internal approval process and is made available for bidding.

*   *Preview:* The date that you can make available to potential bidders, allowing them to review the event as well as enter and save their bids, which they can post as soon as the event starts.

    You can preview only auction and RFx (request for quote), not RFI (request for information) events.

*   *Start:* The date when bidders can begin to post bids for the event.

*   *End:* The date when the bidding closes.

    This time can be extended; if a last-minute bid is entered, you can extend the end date to give earlier bidders the opportunity to counterbid.

Defining Strategic Sourcing Business Units

To set up sourcing business units, use the Maintain Business Units (BUS_UNIT_C_A1) component.

This section discusses how to:

*   Define a Strategic Sourcing business unit.

*   Set event dates.

See Also

Pages Used to Define Strategic Sourcing Business Units

Page Name	Definition Name	Navigation	Usage
Business Unit Definition	BUS_UNIT_TBL_A1	Set Up Financials/Supply Chain, Business United Related, Sourcing, Business Unit Definition	Define the parameters of the business unit. Either click the Add button after adding a new value, or select a business unit by number from the list of existing values.
Default Dates	A1_DEFLT_DATE	Set Up Financials/Supply Chain, Business United Related, Sourcing, Business Unit Definition	Set the dates and times for previewing, starting, and ending an event.

Defining a Strategic Sourcing Business Unit

Access the Business Unit Definition page (Set Up Financials/Supply Chain, Business United Related, Sourcing, Business Unit Definition).

Business Unit Definition page (1 of 2)

Business Unit Definition page (2 of 2)

Note. These fields are available for selection when you create new Strategic Sourcing business units.

Unit and **Short Description**	Enter the name and description for the new Strategic Sourcing business unit.
Default SetID	(Optional) Select a value for this business unit.
Create BU	Click this button after you enter all the field information to save the data and create the business unit.
	If the business unit is unique, a new row is inserted into the setID table.

Enter the values for the fields; these are the default values for events that are created for this business unit. You can change any of these defaults on a per-event basis when you create events.

Business Unit Definition

Location Code	Enter default geographic locations for events within this business unit.

Billing Location	Enter mailing addresses for billings that are to be used for this business unit. This applies only to sell events.
AM Unit (asset management unit)	Enter the Asset Management business unit that is to be used for sell events within this business unit. Selected assets are based on the asset management business unit that is associated with the event business unit.
Bill Source	Enter the external and online systems from which PeopleSoft Billing receives bills. When you integrate with PeopleSoft Asset Management and sell an asset by using a PeopleSoft Strategic Sourcing sell event, the Strategic Sourcing system sends the asset sale information to PeopleSoft Asset Management. PeopleSoft Asset Management then sends that information to PeopleSoft Billing to create the bill. The PeopleSoft Billing system uses the bill source to identify that the bill originated from PeopleSoft Strategic Sourcing. The system displays this field only if you have PeopleSoft Asset Management installed.
Dispatch Method	Enter the default means by which bidders are notified: *Email, Print,* or *Fax.*
Currency Code	Enter the default currency that is to be used for events that are within this business unit.
Rate Type	Enter the default rate type that is to be used for events that are within this business unit.
Allow Multicurrency Events	Select to allow events to be created in currencies other than the default.
Log History of Event Changes	Select to indicate that you want to track the event change dates and times, and the user making changes to a sourcing event.
Require New Version for Edits	Select to indicate that a new event version must be created when an event is changed.
	Important! If you select this check box, you must create a new version every time you modify an event.
Permit Award to Previous Round	Select to indicate whether a previous event round can be awarded. If this option is not selected, you can award bids only from the current round.
Allow Vendor Creation at Award	Select to allow vendors to be created from bidders at the time of award.
	When awarding events to vendors converted from bidders, the user must also have the appropriate access on the Procurement - Vendor Processing Authority page to enter and approve vendors. To award purchase orders or contracts, users must have access on the User Preferences - Procurement page to create contracts and purchase orders.
	See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining User Preferences," Defining Procurement User Preferences.

Default Options for All Events

Create PDF on Event Post	Select to create a PDF version of the sourcing event. If this option is not selected, PDF creation is suppressed.
Allow Bidder XML Downloads	Select to enable bidders to download events to an XML file. If this option is not selected, a PDF version of the sourcing event is created; however, an XML version is not created when the events are posted.
Factor Event Score Into	Select to indicate that you want the system to factor the header score into the total score for the event or the individual line score.

If *Total Score* is selected, the header score is factored into the total score of the event, which is calculated by adding the weighted line scores plus the weighted header score. Select this option if you intend to award the entire event to one bidder.

If *Line Score* is selected, a *header score* bid factor will automatically be added to each line within an event. The line score will be calculated by adding the weighted scores of each line bid factor plus the weighted header score. Select this option if you intend to award different lines within the event to different bidders, or if you intend to use the optimization engine to recommend sourcing awards. The optimization engine uses the bidders line scores, not total scores, to determine an ideal award allocation.

Header Weighting	Enter a default weighting to determine how the system weighs the event header score in relation to the total or line score.

For example, if the header score is factored into the total score and you set the default event header weighting to 20 percent, then create an event with three lines. Line 1 is weighted 50 percent, line 2 is weighted 20 percent, and line 3 is weighted 10 percent. The total weighting of the lines is 80 percent plus the defaulted weighting of the header (20 percent), totaling 100 percent.

For example, if the header score is factored into the line score and you set the default event header weighting to 20 percent, then the sum of the remaining bid factors for each line must total 80 percent. For example, you could have the price bid factor with a weighting of 50 percent and warranty with a weighting of 30 percent. The remaining 20 percent would be the *header score* bid factor, which is automatically added to each line.

Bid Quantity Rule	Select the bid quantity rule that will be the default value for all lines in the event. You can change this during event creation:

See <u>Chapter 9, "Creating Events," page 121.</u>

- *Allow Extra Quantity to be Bid:* Bidders can bid more than the requested quantity up to the specified maximum bid quantity.

- *Bid Up to the Maximum Quantity:* Bidders can bid up to the specified maximum or requested line quantity.

- *Quantity Not Applicable:* Bidders are not required to enter a bid quantity—only their bid price for lines that are marked with this option.

  If this value is selected, the requested line quantity and bid quantity are automatically set to *1*.

  This option is most commonly used for service-type lines that do not require an actual quantity to be bid.

  When a line using this option is awarded to a purchase order or contract, the line is noted as *Amount Only* on the awarded purchase order or contract.

  See <u>Chapter 15, "Analyzing Bids and Awarding Events," page 283.</u>

- *Requested Quantity Required:* Bidders must bid the exact line requested quantity.

  If this value is selected, the bid quantity is automatically set to the line requested quantity on the bid response pages.

Bid Required on All Lines	Select to indicate that the bidders must submit bids for all lines in the event.
Start Price Rule	Select a value to indicate the rule that the system is using as a basis for pricing:

- *Display and Also Must Beat:* The line start price is displayed to bidders and bidders are required to beat the start price.

- *Display but Must Not Beat:* The line start price is displayed to bidders, but bidders are not required to beat the start price.

- *Do Not Display:* The start price is hidden from the bidders.

Do Not Use Best Bids on New Rounds	Select to indicate that new rounds should not be created using best bids when the bids are countered. If you select this option, then bidders will not be able to accept the counter offer on the Create Bid Response page; bidders will be forced to rebid. In this scenario, bidders will still be able to either counter or withdraw the bid.
	This setting will default to the Event Details page based on the business unit. However, you can change the setting at the event level on the Event Settings and Options page.

Display Bid Factor Best/Worst and **Display Bid Factor Ideal Value**	Select to show the best and worst values for the bid factor or the ideal value for the bid factor on the Create Bid Response page. If you deselect these options, then bidders will not be able to see the best and worst values or the ideal value for a bid factor on the Create Bid Response page.
	These settings will default to the Event Details page based on the business unit. However, you can change the settings at the event level on the Event Settings and Options page.
Round/Version Display	Select a value to indicate how the rounds should appear to bidders:

- *Display Round:* The system displays the round number to bidders.

- *Display Round and Version:* The system displays the round and version number to bidders.

- *Do Not Display:* The system does not display any round or version information.

RFx Event Default Options

Multiple Bids Allowed	Select to allow multiple bids on RFx sourcing events. Auction events inherently allow multiple bids by the same bidder on the same event.
Allow Edit of Posted Bids	Select to enable bidders to edit their posted bids for RFx and RFI events. Bidders cannot edit their posted bids on auction events.
Sealed Event	Select to indicate that the event is sealed, which means that the event originator cannot view either bids or bid history until the event has ended. This option is available only for RFx events.
Display Bid Factor Weightings	Select to display to bidders the weightings associated with bid factors for RFx and RFI events. Bid factor weightings are always displayed to bidders on auction events.

Auction Event Default Options

Allow Proxy Bidding	Select to enable bidders to use automatic proxy bidding.
	See

Rank Options	Select a value:
	• *Display Rank Only*
	• *Display Rank/Total # of Bids* (display rank/total number of bids)
	• *Do Not Rank*

Note. If you selected the Allow Proxy Bidding check box, this field is not available.

Event Will Be	Select a value to indicate the basis on which the event will be awarded:
	• Price Based: Price is the only bid factor allowed on the event.
	Header bid factors cannot be added nor any other line bid factors. Bidders will compete based on price.
	• Score Based: Bidders will compete based on the score of their bid factor responses.

Note. If you selected the Allow Proxy Bidding check box, *Price Based* is automatically selected because proxy auctions are based on price.

Bidders Must Beat	Select a value:
	• Own Bid: Bidders are required to beat their last posted bid, not the current winning bid.
	• Winning Bid: Bidders must beat the current winning bid.

Note. If you selected the Allow Proxy Bidding check box, *Winning Bid* is selected.

Display Winning Bid to Bidders	Select this option if you want the winning bid to be displayed to all bidders.

Note. If you selected the Allow Proxy Bidding check box, this field is not available.

 Also if you selected that bidders must beat the winning bid, this option must be selected.

Bid History Display	Select a value to indicate how to display the bid history to bidders:
	• *Display and Show Identity:* The system displays the bid history including the identity of all bidders.
	• *Display but Hide Identity:* The system displays the bid history but does not display the identity of the bidders.
	• *Do Not Display:* The system does not display any bid history.

Bidders Compete At	Select either Event Level or Line Level.
	If Event Level is selected, bidders compete based on best total price or best total score. In some cases, a bidder can post a subsequent bid that has a worse score or price on one or more lines as long as the total score or price is better than the bidder's previous bid or the current winning bid.
	If Line Level is selected, bidders compete based on the best line price or line score.
	Note. If you selected the Allow Proxy Bidding check box, this field is not available.

RFI Event Default Options

Respond to all Bid Factors	Select to indicate that bidders must respond to all bid factors associated with sourcing events.
Score RFI Event (score request for information event)	Select to indicate that you want the system to calculate a score for RFI responses.

Event Control Settings

Allow Line Groups	Select to allow line groups in events.
Allow Constraints	Select to allow constraints in events.
Allow Price Breaks	Select to allow price breaks in events.
Allow Price Components	Select to allow price components in request for quote events.
Allow Cost Contribution	Select to allow cost contribution for auction events.

Integration Options

External PO Integration (external purchase order integration)	Select to enable awarded events to be published to external purchasing systems. Values are:

          •   *EnterpriseOne Integration*

          •   *No External Integration*

          •   *PeopleSoft 8.4 Integration*

          The system automatically publishes the purchase order when you click the Post Award button on the Award Details page. With this selected, you can't award buy events to PeopleSoft Purchasing.

          Important! If you select this check box, you can't award buy events to PeopleSoft Purchasing; you can award events only to an external purchasing system.

Integration Node	This field appears when you select an external PO integration. Select the integration node for the external PO integration. All events created under the business unit are posted to the same external system.
Post Events to Third Party	Select to allow events to be posted to third-party systems.
Buy Events	Select to allow buy events to be posted to third-party systems.
Sell Events	Select to allow sell events to be posted to third-party systems.
RFI Events	Select to allow RFI events to be posted to third-party systems.
Integration Node	Select the integration node for event integration.
Buy Event Types	If you allow buy events to be posted to third-party systems, select the type of buy events that can be posted to third-party systems.

          •   *Auction*

          •   *Both RFX and Auction*

          •   *RFX*

Sell Event Types	If you allow sell events to be posted to third-party systems, select the type of sell events that can be posted to third-party systems.

          •   *Auction*

          •   *Both RFX and Auction*

          •   *RFX*

Notify Vendor Options

Award Notification based upon	Select an option for sending mail notification to the vendor and nonawarded vendors upon posting of the award. Options include:

- *Days:* Select to send notification based on a date. If you select this option, enter a numeric value in the Notify After Days field.

- *Full Award:* Select to send notification when the event is fully awarded.

- *Immediate:* Select to send notification immediately upon posting of the award.

Setting Event Dates

Access the Default Dates page.

Use this page to set and maintain defaults for the preview, start, and end dates of all events that are related to this specific business unit. These defaults can be adjusted on a per-event basis when you create individual events, at which time you can also provide for an automatic extension of the event.

Enter the values of event dates and times that you need to set.

Increment	Enter the unit of time in days, hours, or minutes that you want to use to calculate the period.
Start Time	Enter when bidders can post their bids on the items offered. The start date of the event is relative to the create date; that is, *X* days, hours, or minutes after the create date.
Preview Time	(Optional) Enter the time when prospective bidders can review the items that are offered and enter their responses to bid factors, but not post the bid. The time for preview is relative to the start time, that is, *X* days, hours, or minutes before the start time.
End Time	Enter the time when bidders can no longer bid; the event closes pending award. The end of the event is relative to the start time, that is, *X* days, hours, or minutes after the start time.

Chapter 3

Preparing to Implement PeopleSoft Strategic Sourcing

This chapter provides an overview of PeopleSoft Strategic Sourcing implementation and discusses how to:

- Set up instant messaging by using MultiChannel Framework.

- Set up bidder categorization trees.

- Set up the registration homepage.

- Set up discussion forums.

- Set up file attachment servers.

- Set up the uniform resource locator (URL) location for notifications.

- Prepare terms and conditions.

- Set up reason codes.

- Set up user preferences.

- Create standard comments.

Understanding PeopleSoft Strategic Sourcing Implementation

This section discusses:

- Bidder groups.

- Standard comments.

- Terms and conditions.

- Discussion forums.

- Implementation order.

Bidder Groups

You can create additional groupings for bidder invitations that enable you to save frequently used bidders as a group and invite the group to future sourcing events. This feature expedites the process for searching and selecting bidders. Groups can contain any number and combination of bidders, vendors, and customers, therefore providing the maximum flexibility for maintaining lists containing different bidder types.

See Chapter 9, "Creating Events," Creating Bidder Groups, page 182.

Standard Comments

You can create various comments that you use regularly in various types of events. By creating standard comments, you do not have to rewrite them for each event or remember which comments need to go with which type of event.

You attach comments to an event when you create the event.

You can display the comments on the event to the bidder or, if they are comments for internal use, you can hide them from bidders.

You can include comments on the award. If you are awarding a purchase order or contract, the comments on the event also appear on the awarded purchase order or contract.

Terms and Conditions

Terms and conditions are the legal parameters that you establish to govern bidding on events. The Terms and Conditions document is displayed to users when they register to bid; they must accept the terms and conditions to complete their registration.

The document is also available for registered bidders to review at any time.

Discussion Forums

Bidders can use discussion forums to communicate with the event creator. PeopleSoft Strategic Sourcing provides an event-specific forum for bidders to ask questions regarding the event and have them answered by the buyer. The forum administrator can delete messages from the forum, and delete entire forums as well.

Implementation Order

Implement PeopleSoft Strategic Sourcing in the following order:

1. Strategic Sourcing installation options and the MultiChannel Framework for chat.

2. Autonumbering.

   To set up automatic numbering, use the Auto Numbering page (Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Automatic Numbers).

   See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Defining Additional Common Information.

3. Bidder categorization trees.

4. Bidder registration defaults.

5. Discussion forums.

6. File attachment server.

7. URL location for notifications.

8. Bidder terms and conditions.

9. Sourcing reason codes.

10. User preferences.

11. Standard comments.

Setting Up Instant Messaging by Using MultiChannel Framework

To set up instant messaging for PeopleSoft Strategic Sourcing, use the Installation Options - Strategic Sourcing page.

To set up queues, use the MultiChannel Queue (MCF_Q_CONFIG_CMP) component. To set up agents, use the MultiChannel Agents (MCF_AGENT_CMP) component.

Use the PeopleTools MultiChannel Framework to enable instant messaging among bidders and event creators. Bidders can initiate chats with an event owner, which enables bidders to receive immediate responses on questions or clarifications for a selected event.

To set up the MultiChannel Framework:

1. Create and configure clusters.

2. Configure REN servers.

3. Configure MCF queues.

4. Set up MultiChannel Framework defaults on the Installation Options - Strategic Sourcing page.

   See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining Strategic Sourcing Installation Options.

5. (Optional) Maintain MCF agents.

See *PeopleTools PeopleBook: PeopleSoft MultiChannel Framework.*

Note. To maintain a chat log for events, select PeopleTools, MCF, Universal Queue, Configuration, Cluster Tuning. Change the Key log_chat_ses value to *Yes* to activate the log. You must reboot the application server for the system to start maintaining a chat log.

Setting Up Bidder Categorization Trees

To set up bidder categorization trees, use the Maintain Categorization Trees (AUC_SLF_CAT_CREATE) component.

This section provides an overview of bidder categorization and discusses how to:

•   Set up bidder categorization trees.

•   Edit and view self-categorization trees.

Understanding Bidder Categorization

You can set up bidder categorization trees, which bidders can use to register for interest in selected categories. You can use predefined trees or manually add nodes. You can select the number of node levels to display to the bidders; for example, you might display only the top three node levels of a four-node tree to the bidders.

Registered bidders can select bidding categories when they register to personalize the events in which they want to participate. Bidders can also maintain their lists of categories after they register and after becoming a vendor or customer. Event creators can use these categories to target event invitations to the group of bidders who are most interested in those events.

Pages Used to Set Up Bidder Categorization Trees

Page Name	Definition Name	Navigation	Usage
Maintain Categorization Trees	AUC_CAT_CREATE_HP	Set Up Financials/Supply Chain, Product Related, Sourcing, Create Self Categorization Tree	Create new and view existing self-categorization trees.
Self Categorization Tree	AUC_SLF_CAT_CREATE	Click Edit next to a tree on the Maintain Categorization Trees page to view an existing tree or create a new one.	Create and modify categorization trees that can be associated with bidders.

Setting Up Bidder Categorization Trees

Access the Maintain Categorization Trees page (Set Up Financials/Supply Chain, Product Related, Sourcing, Create Self Categorization Tree).

Maintain Categorization Trees page

SetID	Select the setID for the tree.
Create Tree	Click to create a new self-categorization tree.

Editing and Viewing Self-Categorization Trees

Access the Self Categorization Tree page (click the Edit button next to the tree that you want to edit or view on the Maintain Categorization Trees page).

Tree Legend

🖊 Edit Node	Add Sibling Node	Paste Node	Add PeopleSoft Tree
Add Child Node	✂ Cut Node	Delete Node	

☑ **Expand All Nodes When Loaded**
It is recommended that you disable this option when your tree has a large number of nodes.

Strategic Sourcing Tree

- Sell - Sell Categories
  - AUTO - Automobile
  - BLDG - Building
  - COMP - Computers
    - SOFT - Software
  - ME - Machinery & Equipment
- Buy - Buy Categories
  - CAMPING - Camping Equipment
  - CYCLING - Cycling Equipment
  - OFFICE_SUPPLIES - Office Supplies
  - HIKING - Hiking Equipment
  - FISHING - Fishing Equipment
  - CLIMBING - Climbing Equipment
  - MISC - Miscellaneous
  - PROMO ITEMS - Promotional Items
  - SUPPLIES - Supplies
  - SERVICES - Services
  - SERVERS - Servers
  - PRINTERS - Printers
  - MULTIMEDIA - MultiMedia
  - HARDWARE - Computer Hardware
  - ACCESSORIES - Accessories

Self Categorization Tree page

Sourcing, Sell, or **Buy**	Click to create a tree for sourcing, sell, or buy events.
	Note. Sell categories appear as purchase categories to bidders. Buy categories appear as sell categories to bidders.
🖊	Click to edit the selected tree node. The system displays the group box. Select a category and click the Submit button to add it to the tree.
	Click to add a child branch to the node.
	Click to add a sibling branch to the node.
✂	Click to cut the selected child.

	Click to paste a child.
	Click to remove a child.
	Click to add an existing PeopleSoft tree as a node to the self-categorization tree. If you have an existing item or asset category tree, copying it into the buy or sell node saves time.

Setting Up the Registration Homepage

To set up bidder registration, use the Bidder Registration Setup (AUC_BID_REG_SETUP) component.

This section discusses how to set up bidder registration.

Pages Used to Set Up the Registration Homepage

Page Name	Definition Name	Navigation	Usage
Bidder Registration Setup Homepage	AUC_BID_REG_SETUP	Set Up Financials/Supply Chain, Product Related, Sourcing, Bidder Registration Setup	Identify the information that bidders must enter as part of registration and indicate whether approvals are required
Bid Factor Question	AUC_RG_BF_CMMT_SEC	Click the Bid Factor Question button on the Bidder Registration Setup Homepage.	Define profile questions for businesses or individuals to answer as part of the registration process.

Setting Up Bidder Registration

Access the Bidder Registration Setup Homepage page (Set Up Financials/Supply Chain, Product Related, Sourcing, Bidder Registration Setup).

Bidder Registration Setup Homepage page (1 of 2)

Bidder Registration Setup Homepage page (2 of 2)

Default Bidder Registration Setup	Click to make the values that you enter a default guest user for the selected setID.
User ID	Select to apply roles that are assigned to a default bidder to this bidder. This default bidder user ID is set up on the User Profile - Roles page.
	Important! You send the default user ID to new bidders when you invite them to events. They use this value as their ID and password, after which they can create their own bidder information.
Tree ID	Assign a default bidder categorization tree to bidders when they register.

Workflow Approval Required	Select to require bidder registrations to be approved before bidders can use PeopleSoft Strategic Sourcing.
	Important! If you select this check box, all bidder registrations must be approved.
Role Name	Assign the user role that is to be responsible for approving all bidder registration requests if workflow is required.
Event Preferences	Select the type of event to set up workflow approval for each role. Values are *Both, Purchase Good/Services,* and *Sell Good/Services.*
SIC Codes (standard industry code codes)	Specify whether bidders can enter standard industry codes that are related to their businesses. If the check box is selected, you can specify the type of standard industry codes that bidders can select from.

Standard ID Qualifier   Select which ID numbers must be provided by the bidders during registration. Options include:

- *Comp Tax Reg Number - Brazil*

- *Company Identification Number*

- *Company Number - Australia*

- *DUNS Number*

- *Dun & Bradstreet Number*

- *Fiscal ID - Company - Italy*

- *Fiscal ID - Indiv - Italy*

- *Fiscal ID Number - Spain*

- *Ind Tax Reg Number - Brazil*

- *Municipal Reg Number - Brazil*

- *NIC Number - France*

- *SIREN Number - France*

- *SIRET Number - France*

- *State Reg Number - Brazil*

- *Tax Identification Number*

Required Flag   Select to make each standard ID qualifier required for bidder registration.

Profile Questions   Enter to obtain bidder-identified information from the bidders. For example, you may want to know how many years the bidder has been in business. You create a profile code of YEARSBUS, make it a numeric type, and click the Bid Factor Question button to ask the question: How many years have you been in business? If you select the Required Flag check box, the bidder must answer to register successfully.

Bidder Type   Indicate whether the profile question is for bidders registering as a business, an individual, or both.

Bid Factor Type	Select standard bid factor types for profile codes:	

- *Attachment*

- *Date*

- *List*

- *Multi-select List*

- *Monetary*

- *Numeric*

- *Text*

- *Yes/No*

Required Flag	Select to make each profile factor required for bidder registration.

See Also

PeopleTools PeopleBook: Security Administration

PeopleSoft Application Fundamentals 9.1 PeopleBook, "Defining User Preferences," Defining Strategic Sourcing User Preferences

Setting Up Discussion Forums

To set up discussion forums, use the Sourcing Forum Administration (AUC_FORUM_ADMIN) component.

This section discusses how to set up discussion forums.

Pages Used to Set Up Discussion Forums

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Forum Settings	AUC_FORUM_MGR	Set Up Financials/Supply Chain, Product Related, Sourcing, Forum Administration	Create and manage discussion forums. You also can set up forum user permissions.
Manage Forum Messages	AUC_MESSAGE_MGR	Click the Manage Forum Messages link on the Manage Forum Settings page.	View and delete message threads.

Page Name	Definition Name	Navigation	Usage
Forum User Lookup	AUC_FORUM_LOOKUP	Click the Load Binds button for a user type on the Manage Forum Settings page.	Search for forum users.

Setting Up Discussion Forums

Access the Manage Forum Settings page (Set Up Financials/Supply Chain, Product Related, Sourcing, Forum Administration, then click the Event Discussion link on the Forum Administration page).

Manage Forum Settings page

To create permissions for a discussion forum user:

1. (Optional) set this forum as the forum for which all event discussion threads are maintained by selecting the Default Event specific forum check box.

2. Select a user type of *Bidder, Customer, Role, User,* or *Vendor.*

    If you want to assign permission for a group of users by role, select *Role.*

3. Click Read Only to assign read permission to a user or role but not the ability to create messages.

4. Click Block to prevent the user type from accessing the discussion forum.

Setting Up File Attachment Servers

To set up file attachment servers, use the File Attachments (PV_ATTACH_ADMIN) component.

This section discusses how to set up file attachment servers.

Page Used to Set Up File Attachment Servers

Page Name	Definition Name	Navigation	Usage
Maintain File Att Servers (maintain file attachment servers)	PV_ATT_SRV_ADMIN	Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments	Set up the FTP server location for PDF and XML file attachments which are included with notifications.

Setting Up File Attachment Servers

Access the Maintain File Att Servers page (Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments).

1. Click the Add FTP Server button.

2. Enter the login name, password, FTP server name, and path name for the attachments.

See Also

Setting the URL Location for Notifications

To set up URLs, use the URLs (URL_TABLE) component.

This section discusses how to set up the URLs.

Page Used to Set Up URL Locations

Page Name	Definition Name	Navigation	Usage
URL Maintenance	URL_TABLE	PeopleTools, Utilities, Administration, URLs	Enter the URL, pertinent description, and comments.

Setting Up URLs

Access the URL Maintenance page (PeopleTools, Utilities, Administration, URLs).

You must set up the following URLs:

- AUC_TEMP

- AUC_TEMP_UPLOAD

- EMP_SERVLET

- SUP_SERVLET

Preparing Terms and Conditions

To set up terms and conditions, use the Terms and Conditions Setup (AUC_TERMS_CMP) component.

This section discusses how to create terms and conditions.

Pages Used to Prepare Terms and Conditions

Page Name	Definition Name	Navigation	Usage
Define Terms and Conditions	AUC_TERMS_PG	Set Up Financials/Supply Chain, Product Related, Sourcing, Define Terms and Conditions	Create legal terms for bidder agreement.
Terms and Conditions	AUC_VIEW_TERMS	Event Responses, View Terms and Conditions	Display terms and conditions for review.

Creating Terms and Conditions

Access the Define Terms and Conditions page (Set Up Financials/Supply Chain, Product Related, Sourcing, Define Terms and Conditions).

Sections   Create several sections within a terms and conditions document. An unlimited amount of text can go into each section.

Message Text   Enter the text of the terms and conditions.

Setting Up Reason Codes

To define reason codes, use the Reason Codes (REASON_CD) component. Use the REASON_CD_CI component interface to load data into the tables for this component.

This section discusses how to set up reason codes.

Page Used to Set Up Reason Codes

Page Name	Definition Name	Navigation	Usage
Reason Codes	REASON_CD	Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Reason Codes	Define reason codes, which provide explanations for occurrences such as pausing and resuming auction events, disallowing bids, and disapproving a bidder's registration request.

Setting Up Reason Codes

Access the Reason Codes page (Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Reason Codes).

You can set up reason types and codes within PeopleSoft Strategic Sourcing. Reason types correspond to actions; codes are the reasons given for the action.

Oracle delivers the following reason types and codes in PeopleSoft Strategic Sourcing, but you can add more to meet business requirements:

- Bid Rejection

- Bidder Registration Denial

- Decline Event Invitation

- Disallow Bid

- Pause Event

- Resume Event

Setting Up User Preferences

To define user preferences for PeopleSoft Strategic Sourcing, use the Define User Preferences (OPR_DEFAULT) component.

This section discusses how to create PeopleSoft Strategic Sourcing user preferences.

Page Used to Set Up User Preferences

Page Name	Definition Name	Navigation	Usage
User Preferences - Strategic Sourcing	OPR_DEF_TBL_SS	Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences. Click the Strategic Sourcing link on the User Preferences page.	Define PeopleSoft Strategic Sourcing-specific user preferences and defaults.

Creating PeopleSoft Strategic Sourcing User Preferences

Access the User Preferences - Strategic Sourcing page (Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences). Click the Strategic Sourcing link on the User Preferences page.

User Preferences - Strategic Sourcing page

Use this page to set up permissions and defaults for the selected user, including whether he or she can create buy, sell, or RFI events, event authorizations, copy from transactions, sourcing constraint permissions, and sourcing template permissions.

If you select the *Award Events* option in the Event Authorizations region, you must select at least one Award Type option. The user will have access to create only the documents selected here. Options include *Purchase Order, PO Contract, General Contract,* and *Single Release PO Contract.*

Note. To award purchase orders or contracts, users must have access on the User Preferences - Procurement page to create contracts and purchase orders. If the Strategic Sourcing business unit is set up to allow vendors to be created from bidders upon award, users must also have access to enter and approve vendors on the Procurement - Vendor Processing Authority page.

See Also

PeopleSoft Application Fundamentals 9.1 PeopleBook, "Defining User Preferences," Defining Strategic Sourcing User Preferences

Creating Standard Comments

To set up standard comments, use the Standard Comments (AUC_STD_COMM_COMP) component. To set up standard comment types, use the Standard Comments Type (AUC_STDCOMTYP_COMP) component.

This section lists the pages used to create standard comments.

See Also

Pages Used to Create Standard Comments

Page Name	Definition Name	Navigation	Usage
Standard Comments	AUC_STD_COMMENTS	Sourcing, Create Events, Standard Comments	Create boilerplate comments that you can use regularly for many events.
Standard Comments Type	AUC_STD_COMM_TYPE	Sourcing, Create Events, Standard Comments Type	Identify categories of comments, such as comments specific to sale events, for ease in identifying which comments to attach to which events.

Chapter 4

Using Workflow in PeopleSoft Strategic Sourcing

This chapter provides an overview of workflow in PeopleSoft Strategic Sourcing and discusses how to:

*   Define approval processes.

*   Assign approval processes for sourcing events.

Understanding Workflow in PeopleSoft Strategic Sourcing

PeopleSoft Strategic Sourcing uses the SCM Approval Workflow Engine to define approvals for events and sourcing plans. To access pages for setting up approval process workflows, select Set Up Financials/Supply Chain, Common Definitions, Approvals.

See *PeopleSoft 9.1 PeopleBook: Approval Framework.*

PeopleSoft Strategic Sourcing delivers predefined approval processes examples for:

*   *Plan Approval:* Used to approve sourcing plans.

*   *Event Approval:* Used to approve sourcing events.

The PeopleSoft Strategic Sourcing workflow feature enables you to create and maintain approval processes for the posting of events. PeopleSoft delivers Strategic Sourcing with a few example approval processes.

Important! The example approval processes should be *overwritten* to fit business requirements. Do not create new approval processes because PeopleSoft Strategic Sourcing uses the Event Approval and Plan Approval processes exclusively.

The Event Approval process requires that you turn on approval by business unit. Use the Assign Approval by Business Unit page from the Sourcing Administration homepage. If a newly posted event does not fall under a business unit with active approval, no approval process will be run for that event. The actual criteria used to determine if an event requires approval is located on the Approval Process Definition page (Set Up Financials/Supply Chain, Common Definitions, Approvals, Approval Process).

The Plan Approval process does not use this or any other business unit setup page to determine if the approval process should be run.

Note. You can configure any approval process to use the business unit as an approval criteria.

The following situations can occur when events or sourcing plans are posted:

- *Event only:* When workflow approval is required for the event business unit, the initial approval status is Pending Post Approval, indicating that the transaction is pending successful matriculation through the Event Approval process.

- *Event and plan:* If the criteria for the approval process is not met, the status is Posted and the designated approver will be notified.

  If the criteria is met, then the approval workflow engine routes the approval to the approvers defined in the approval process.

- *Event only:* When approval is not required for the event business unit, the approval process will not run and the transaction can continue.

- *Plan only:* The Plan Approval process will always run for a posted plan.

  If the criteria is not met, then the plan will be automatically approved and the approver and plan owner will be notified.

See Also

PeopleTools PeopleBook: Workflow Technology

Roles and Users in PeopleSoft Strategic Sourcing

When you build a workflow approval process, specify who should be notified as an approver for each step. Identify the users according to the roles that they play in the organization and in the approval process. The process of creating an event, for example, might involve the role of a buyer, a purchasing analyst, and a manager.

When the system routes a work item to the next step in the approval process, it sends an email and worklist item to the users who fill the role that is assigned to that step.

Define users' roles when you give them their user IDs. In some cases, you might define multiple users who fill the role. In most cases, the system runs a query to find out who are the appropriate users for a specific work item.

To define roles, use the User List Definition page (Set Up Financials/Supply Chain, Common Definitions, Approvals, User List).

See Also

PeopleTools PeopleBook: Workflow Technology

Defining Approval Processes

This section discusses how to:

1. Register an approval process.

2. Define configuration options.

See *PeopleSoft 9.1 PeopleBook: Approval Framework.*

Pages Used to Define Workflow Processes

Page Name	Definition Name	Navigation	Usage
Setup Process Definitions	EOAW_PRCS_MAIN	Enterprise Components, Approvals, Approvals, Approval Process Setup	Define an approval process to be used with workflow. See *PeopleSoft 9.1 PeopleBook: Approval Framework.*
Register Transactions	EOAW_TXN	Enterprise Components, Approvals, Approvals, Transaction Registry	Define a workflow approval process.
Configure Transactions	EOAW_TXN_NOTIFY	Enterprise Components, Approvals, Approvals, Transaction Configuration	Add configuration options to the workflow process.

Registering an Approval Process

Access the Register Transactions page (Enterprise Components, Approvals, Approvals, Transaction Registry).

Register Transactions

Process ID:	Event Approval
*Description:	Sourcing Event Approval
Object Owner ID:	Strategic Sourcing
*Cross Reference Table:	AUC_EVENT_APPR
Worklist Prefix:	

▼ Notification Options

*Enable Notifications:	Enable Email and Worklist
*Notification Strategy:	Online Processing
Use Email Approvals:	☑
Form Generator Package Root:	
Form Generator Class Path:	

▼ Internal URL Definition

Internal URL Base:	
Internal Portal Name:	
Internal Node Name:	

▼ External URL Definitions

External URL Base:	
External Portal Name:	
External Node Name:	

Register Transactions page (1 of 2)

Register Transactions page (2 of 2)

This page is the central record for all approvals for a specific workflow process.

Important! Only the Enable Notifications and Notification Strategy options should be changed on this page. Other changes will require significant technical modifications to the application code.

Approval Process ID and **Description**	Enter the name and description for the workflow approval process. The description is a required field.
Object Owner ID	Select *Strategic Sourcing.*

Defining Configuration Transactions

Access the Configure Transactions page (Enterprise Components, Approvals, Approvals, Transaction Configuration).

Configuration Transactions page

Important! The only options that should be changed on this page are the Ad Hoc Approver Options. If necessary, you can change the (email template) template name directly in the system on the Generic Template Definition page (PeopleTools, Workflow, Notifications, Generic Templates). Bind variables for this template can be controlled by defining a SQL object for the SQL Object Identifier setting.

Supply Chain Management Approval Workflow documentation should be reviewed before changing any of these settings.

See *PeopleSoft 9.1 PeopleBook: Approval Framework.*

Template Name   (Optional) Select a specific email template to use with this workflow.

Assigning Approval Processes for Sourcing Events

To assign an approval process by business unit, use the Assign Approval by Business Unit (AUC_WF_BU_ASSIGN) component. If approval is not required for any business unit, approval is effectively turned off for events and all events will be set to the Posted status automatically. To define workflow pricing rules, use the Dynamic Pricing Workflow Rules (AUC_WF_RULE) component.

This section discusses how to assign approval processes for Sourcing Events.

Page Used to Assign Approval Processes for Sourcing Events

Page Name	Definition Name	Navigation	Usage
Assign Approval by Business Unit	AUC_WF_BU_ASSIGN	Set Up Financials/Supply Chain, Product Related, Sourcing, Assign Business Unit Approval	Assign approval by business units.

Assigning Workflow Rules to Business Units

Access the Assign Approval by Business Unit page (Set Up Financials/Supply Chain, Product Related, Sourcing, Assign Business Unit Approval).

Assign Approval by Business Unit page

Business Unit and **Description** Displays the name and description of the business unit.

Approval Required   Select the check box to indicate if approvals are required for a specific
                                       business unit.

                                       If approval is required for an event business unit, the approval workflow
                                       engine will run the event through the defined approval process (Event
                                       Approval) when the event creator clicks the Post button on the Event
                                       Summary page (Sourcing, Create Events, Event Details.) No process or
                                       manual intervention is required.

                                       Sourcing plans do not use the business unit assignment functionality.
                                       Sourcing plans automatically run the Plan Approval process when the plan
                                       is posted.

Chapter 5

Creating Global Policies and Constraints

This chapter provides an overview of global policies and constraints and discusses how to create and maintain global policies and constraints.

Understanding Global Policies and Constraints

PeopleSoft Strategic Sourcing enables you to define award constraints and set up defaulting rules so that the constraints can automatically default onto events. During the award process, the constraint rules are included in the optimization process so that the ideal award allocation is recommended while ensuring adherence to the defined constraints. When awards are posted, the system also checks the awards to ensure adherence to the constraints.

For example, your organization may have a policy to give a certain amount of business to minority and woman-owned businesses. This could be a global constraint that applies to all events created across all Sourcing business units. You can specify that 10 percent of all business must be awarded to minority and woman owned businesses. You can then tie the constraint to a bid factor that asks whether the bidder is qualified as a minority or woman-owned business. At award time, the optimization engine ensures that this constraint is met when determining the ideal award. In some cases, more than 10 percent may be awarded to a minority or woman-owned business, based on other constraints that were defined and the bidder's actual responses. Therefore, you can track the progress throughout the year to ensure that the 10 percent objective is being met.

If you are not using the optimization engine to recommend an award or if you change an award that the optimization engine recommended, the system will verify the award to ensure that it adheres to the constraints. If an award violates any constraints, the user will either receive an error or a warning depending on the user's constraint permissions on the Strategic Sourcing User Preferences page.

You can also perform a what-if analysis by changing or inactivating constraints and then rerunning the optimization process.

For constraints that are tracked across events, a progress to date amount is maintained and relayed so that you can track the target goal to the actual results to date. The progress to date is based on the calendar selected during the creation of the business constraint.

By using this functionality, you can:

- Define constraints based on global, business unit, event, and line levels.

- Base constraints on bid factors, the number of awarded bidders, or the quantity or amount that must be awarded.

- Associate defaulting rules to the constraints so that the constraints are automatically attached to the applicable events.

• Add, remove, and modify constraints during event creation, analysis, and award processing.

See Also

Chapter 16, "Optimizing Strategic Sourcing Event Awards," page 311

Prerequisites

Before using the global policies and constraint feature, you must perform the following:

1. If you want to allow default mandatory constraints to be overridden for Strategic Sourcing events, select one of the following options in the Sourcing Constraint Permission group box on the Strategic Sourcing User Preferences page (Set Up Financials/Supply Chain/Common Definitions, User Preferences, Strategic Sourcing):

   • Event: Constraints that apply within a specific sourcing event.

   • Business Unit: Constraints that apply to all sourcing events within a business unit.

   • Global: Constraints that apply to all sourcing events across all PeopleSoft Strategic Sourcing business units.

   If you do not select any one of these options, then you cannot override mandatory constraints that default onto events and the system will enforce the mandatory constraints when posting awards. You will also not be able to change the importance of mandatory constraints or choose to ignore those constraints.

2. Create and maintain constraints using the Sourcing Constraint Setup component (Sourcing, Create Events, Constraints Setup).

See Also

PeopleSoft Application Fundamentals 9.1 PeopleBook, "Defining User Preferences," Defining Strategic Sourcing User Preferences

Chapter 9, "Creating Events," page 121

Common Elements Used in this Chapter

Status   Select *Active* or *Inactive* for the constraint. The default value upon creation is *Active.*

Type   Select the type of constraint that you're defining:

- *Bus Unit* (business unit): Constraints that track spend across all events within the specified business unit.

- *Event:* Constraints that are associated to a specific event. The constraint attributes are applied to the entire event or specific line if the constraint is associated with a line item.

- *Global:* Constraints that track spend across all events for all PeopleSoft Strategic Sourcing business units to which the constraint is associated.

Note. If the constraint has a defaulting event header rule, then the spend is based on the total award amount. If the constraint has a defaulting event line rule, then the spend is based on the total award amount for the specified line.

Sourcing Objective   Select an option:

- Target Goal: The system does not require that the target goal be met for this constraint.

- Mandatory Goal: The system forces the mandatory goal to be met for every event containing this constraint.

Priority   Select a value to prioritize the importance of a constraint. The optimization engine uses the constraint priority to determine an ideal award allocation. The optimization engine meets the higher priority constraints first.

- *1 - Not Important*

- *2 - Less Important*

- *3 - Important* (default value)

- *4 - Very Important*

- *5 - Critical*

Note. Mandatory constraints have a default priority of *Critical.*

Note. This field is used with the *Target Goal* value in the Priority field.

Award Constraint   Select a value of *Price* or *Quantity.* This option applies only to constraints based on bid factors. If you selected *Price,* the constraint is based on the awarded price. If you selected *Quantity,* the constraint is based on the awarded quantity.

Award Sign   Select a specific sign (such as less than, equal to, or between) to indicate the selection parameters of the award.

Value   Enter a numerical value.

Award Basis	Select *Amount* or *Percent* to indicate the basis upon which the award is to be based. This field works with constraints based on amount, bid factor, or quantity. If you selected *Amount,* the value specified is on the awarded amount. If you selected *Percent,* the value specified is on a percentage of the award.
Apply Constraint	Select *Across Bidders* or *Per Bidder.* This field is enabled only for constraints based on bid factors. If the constraint is based on amount or quantity, the constraint is always applied per bidder. If you selected *Across Bidders,* the constraint value is applied across all awarded bidders.

Creating and Maintaining Global Policies and Constraints

To create global policies and constraints, use the Sourcing Constraints (CONSTRAINTS_COMP) component.

This section discusses how to:

- Define constraints.

- Associate constraints to business units.

- Define constraint defaulting rules.

Pages Used to Create and Maintain Global Policies and Constraints

Page Name	*Definition Name*	*Navigation*	*Usage*
Constraint Setup	CONSTRAINT_PG	Sourcing, Create Events, Constraints Setup, Constraint Setup	Create and maintain constraints.
Assign Business Units	CONSTRAINT_BU_SEC	Click the Assign Business Units link on the Constraint Setup page.	Assign constraints to business units.
Constraint Rules	CONST_RULE_SEC	Click the Assign Defaulting Rules link on the Constraint Setup page.	Assign defaulting rules.

Defining Constraints

Access the Constraint Setup page (Sourcing, Create Events, Constraints Setup, Constraint Setup).

Constraint Setup page (1 of 2)

Constraint Setup page (2 of 2)

Step 1: Describe the constraint.

Effective Date	Indicate the date that the constraint is to be effective.
Description	Enter a short description for the constraint. This field is required.
Calendar ID	Select a calendar ID to use for global or business unit constraints. The calendar ID is used to calculate the progress to date for the selected constraint. This field is required for global and business unit constraints.
	For example, if your organization wants to ensure that 10 percent of business is awarded to minority and woman-owned businesses by the end of the year, you should select a calendar ID associated with an annual calendar. The total spend throughout the year is then compared to the spend awarded to minority and woman-owned businesses to calculate a progress to date that you can track throughout the year.
Long Description	(Optional) Enter a long description for the constraint.
Currency Code	Select a currency code for the constraint.
Summary	Displays a text description summarizing the constraint parameters. The summary field is automatically completed as you define the constraint attributes.

Step 2: Define the constraint attributes.

Constraint Based On	Select a value:

- *Amount:* Constraint is based on the amount awarded.

- *Bid Factor:* Constraint is associated to a bid factor.

- *Bidders:* Constraint is based on the number of awarded bidders.

- *Quantity:* Constraint is based on the awarded quantity.

⊞	Click to add additional attributes to the constraint. You can add additional constraint criteria only for constraints that are based on bid factors.

Value Selected in the Constraint Based On Field	*Fields that are Available in Step 2*
Amount	Award Sign Value Award Basis Apply Constraint (display only)

Value Selected in the Constraint Based On Field	Fields that are Available in Step 2
Bid Factor	Bid Factor Code
	Bid Factor Sign
	Award Constraint
	Award Sign
	Value
	Award Basis
	Apply Constraint
Bidders	Award Sign
	Value
Quantity	Award Sign
	Value
	Award Basis
	Apply Constraint (display only)

(Optional) Step 3: Add additional constraint criteria.

+   If the constraint is based on a bid factor, click to add additional constraint criteria to the constraint.

                                       For example, using the minority or woman-owned business constraint discussed earlier, if you have two different bid factors asking whether a bidder is a minority or woman-owned business, you would define the constraint as based on bid factor and first select the *MINORITY* bid factor. You could then add additional constraint criteria for the *WOMANOWNED* bid factor.

Associating Constraints to Business Units

Access the Assign Business Units page (click the Assign Business Units link on the Constraint Setup page).

Assign Business Units page

Select the business units that you want to associate with the constraint and click OK. You must associate at least one Sourcing business unit to business unit type constraints.

Defining Constraint Defaulting Rules

Access the Constraint Rules page (click the Assign Defaulting Rules link on the Constraint Setup page).

Constraint Rules

SetID: SHARE   Constraint Code: MBWB

Description: Minority/Woman Owned Business

Constraint Summary: For Bid Factor {MINORITY} with a value {Equal To} Yes, Award {Awarded Extended Price} must be {Greater Than or Equal To} {15} {Percent} of award {Across Bidders}.Or For Bid Factor {WOB} with a value {Equal To} Yes, Award {Awarded Quantity} must be {Greater Than or Equal To} {15} {Percent} of award {Across

Constraint Rules   Find | View All First ◄ 1 of 1 ► Last

Rule Number: 1   *Rule Type: Header ▼   *Status: Active ▼

Category: [   ] 🔍 = ▼   Start Price: [   ] = ▼

Item ID: [   ] 🔍 = ▼   Extended Price: 200000.00000 >= ▼

Quantity: [   ] = ▼

Sourcing Objective: ○ Target Goal   Priority: 5 - Critical
                    ⊙ Mandatory Goal

Rule Summary: For Bid Factor {MINORITY} with a value {Equal To} Yes, Award {Awarded Extended Price} must be {Greater Than or Equal To} {15} {Percent} of award {Across Bidders} Or For Bid Factor {WOB} with a value {Equal To} Yes, Award

Constraint Based On: Bid Factor ▼

Bid Factor Code: MINORITY 🔍

Bid Factor Sign: = ▼

Yes/No: Yes ▼
Award Constraint: Price ▼

Award Sign: >= ▼

Value: 15.00

Award Basis: Percent ▼

Apply: Across Bidders ▼

Constraint Rules page

Constraint Rules

By defining defaulting rules and associating them to the constraint, the system automatically applies the defaulting rules to sourcing events. You can review the constraints associated with the event, and modify the constraints as needed based on the user preferences settings. Defaulting rules can be added at the event (header) level or at the line level.

Rule Type	Select *Header* or *Line* to indicate whether to apply the constraint to the entire event (header) or per line.
Category or **Item ID**	(Optional) Select a value for these fields.
Quantity	(Optional) Enter as numerical value in this field.
Start Price and **Extended Price**	(Optional) Enter values in these fields.
Copy Previous Rule Attribute	If more than one rule is defined for the constraint, click this button to copy the previous rule's values into the new rule.
Rule Summary	Displays a system-defined summary of the constraint rule.
⊞	Click to add constraints based on different criteria. See Step 2: Define the constraint attributes in Defining Constraints. See Chapter 5, "Creating Global Policies and Constraints," Defining Constraints, page 58.

Chapter 6

Creating and Using PeopleSoft Strategic Sourcing Project Plans

This chapter provides an overview of PeopleSoft Strategic Sourcing project plans and discusses how to:

- Create and use Strategic Sourcing project plans.

- View and manage tasks by resource.

- Approve Strategic Sourcing project plans.

Understanding PeopleSoft Strategic Sourcing Project Plans

By using the sourcing project plans feature, you can capture an entire procurement project plan within PeopleSoft Strategic Sourcing. Here are some of the tasks that you can perform:

- Assign duration days for each task.

- Document instructions.

- Define requirements for completion of each task.

- Assign a resource to the task.

- Optionally mark a task as a milestone.

- Define predecessor tasks, which must be completed before the current task can start.

The start and end dates for a task can either be defined by the user or calculated by the system. You can also link a task with a sourcing event transaction, and enable the task to be automatically updated by a change to the related transaction.

In addition, you can save the plan as a template and use the template as a foundation for future procurement activities. You can route sourcing plans for approval using email notifications. When you post the plan, users who are assigned tasks receive notification and can work the tasks. The plan owner can monitor the progress of the plan as well as the workloads for each resource. This enables the entire sourcing process to be tracked and monitored. Plan owners can view how the expected task dates compare to the actual task dates to determine where potential issues exist in the sourcing process. You can define key tasks as milestones during the creation of a sourcing plan. When these milestones are defined, you can review the status of the milestones to determine whether the project is on schedule.

Common Elements Used in This Chapter

Copy From	Select *Sourcing Plan* or *Sourcing Template* if you want to copy an existing sourcing plan or template.
Description	(Optional) Enter text to describe the sourcing plan or sourcing template.
Historical Plans	Click the Select button to add other plans to this sourcing plan.
Related Events	If any sourcing events are related to this event, a link to the events is available. Click the event ID to view details regarding the related sourcing event.

Creating and Using Strategic Sourcing Project Plans

To define sourcing options, use the Sourcing Options (AUC_OPTIONS) component.

This section discusses how to:

- Define basic details for sourcing project plans.

- Define basic information for sourcing project plans.

- Create new sourcing plans or sourcing templates using the Copy From feature.

- Enter sourcing plan details.

- View sourcing plans using a Gantt chart.

- View or add predecessor tasks.

- View or add sourcing plan details.

Pages Used to Create and Use Strategic Sourcing Project Plans

Page Name	Definition Name	Navigation	Usage
Sourcing Options	AUC_OPTION_PG	Set Up Financials/Supply Chain, Product Related, Sourcing, Sourcing Options	Define general settings for sourcing project plans.
Define Sourcing Plan Basics	AUC_PLN_SUMM_PL_PG	Sourcing, Manage Plans, Plan Details	Define basic information for sourcing plans.
Define Sourcing Plan Details	AUC_PLN_TSK_DTL_PG	Click the Enter Plan Details link on the Define Sourcing Plan Basics page.	Enter sourcing plan details such as tasks, owners, duration in days, and so on.

Page Name	Definition Name	Navigation	Usage
Sourcing Plan Details	AUC_TASK_DTL_SEC	Click the Details button on the Define Sourcing Plan Basics page.	Enter and view task information such as task instructions, number of days for the grace period, and task completion requirements.
Copy From Details	AUC_PLN_CPY_DTL_PG	Select *Sourcing Plan* or *Sourcing Template* in the Copy From field on the Define Sourcing Plan Basics page and then click OK.	Select the details related to the sourcing plan or sourcing template that you want to copy.
Select Tasks to Copy	AUC_PLN_CPY_TSK_PG	Click the Select Tasks link on the Copy From Details page.	Select tasks that you want to copy to the sourcing plan or sourcing template.
Task Predecessor Detail	AUC_TASK_PRED_SEC	Click the Predecessor Task button on the Define Sourcing Plan Basics page.	View, add, or revise any predecessor tasks that must be completed before the task can be performed.
Gantt Chart	AUC_PLN_GANTT_PG	Click the View Gantt Chart link from the Define Sourcing Plan Basics page.	View a graphic representation of the sourcing plan tasks.

Defining Basic Details for Sourcing Project Plans

Access the Sourcing Options page (Set Up Financials/Supply Chain, Product Related, Sourcing, Sourcing Options).

Sourcing Options page

Sourcing Plan Options

Business Unit Calendar	Select a value upon which sourcing plans should be based. This is a required field.
Overall Plan Status	Enter the number of past-due tasks required to change the overall status of the sourcing plan. Overall plan status values are *On Track,At Risk,* and *Behind Schedule.*
Alternate Status Description	(Optional) Enter an alternate description for any of the three delivered overall plan statuses. These descriptions are used to display the overall plan statuses.
# of Past Due Tasks (number of past-due tasks)	Enter the maximum number of tasks that can be past-due before a change in the plan status can occur.
Task Default Grace Period Days	Enter the number of days that a task can be past due. You can change this value on the Task Details page.

Sourcing Plan Notifications

This group box indicates the notifications that should be triggered and who should receive them based on changes to the sourcing plan:

Notification Trigger	Trigger Occurs When	Notifications Can be Sent to:
Change of Overall Plan Status:	The overall event status changes, for example, from On Track to At Risk.	Selected roles
Change of Overall Task Status	The overall task status changes, for example, from On Track to At Risk.	Selected roles
Predecessor Task Completion	A task has a predecessor task that must be completed before the (current) task can be started.	Selected roles
Cancellation of Plan	A sourcing plan is canceled.	Selected roles **Note.** If you selectAssigned To,, notifications are sent to all persons assigned to tasks that are not marked as Complete.

See Chapter 8, "Preparing Strategic Sourcing Notifications," page 115.

Notify	Select who should receive the notification. Values are:
	• Assigned To
	• Plan Owner
	• Current Owner

Understanding Strategic Sourcing Plan Email Notifications

This table describes the email notifications that are generated during the sourcing plan process:

Notification	Description	Trigger	Notifies	Generate Worklist Entry?
Task Assignment	Notification to assigned-to users when a sourcing plan is posted.	A sourcing plan is posted.	Assigned to users for the plan tasks.	No

Notification	Description	Trigger	Notifies	Generate Worklist Entry?
Change of Overall Plan Status	Notification to selected users (based on sourcing options page) when the overall plan status changes. For example, if the status changed from On Track to At Risk.	Triggered from a batch process that should be run daily to check the number of tasks that are behind schedule. The status changes based on the number of past-due tasks defined on the Sourcing Options page.	Selected users on the Sourcing Options page: Assigned To, Plan Owner, or Current Owner. **Note.** If the plan owner and current owner are the same, only one notification is sent.	No
Change of Overall Step Status	Notification to selected users when the overall task status changes. For example, if the status changed from Overdue Task to Past Grace Period.	Triggered from a batch process that should be run daily to check whether the end date of the task is earlier than the batch run date or whether the task end date plus the duration grace period is earlier than the batch run date.	The selected users on the Sourcing Options page (Assigned To, Plan Owner, Current Owner).	No
Predecessor Task Completion	Notification to selected users when all the predecessor tasks (steps) for a task have been completed.	Can be triggered from a batch process to check whether all predecessor tasks have a status of Complete and therefore trigger the notification. Or it can be triggered when the user completes a task on the Update Task Information page.	The selected users on the Sourcing Options page (Assigned To, Plan Owner, Current Owner).	Yes
Approval Required	Notification to plan approver that a plan requires approval.	A sourcing plan is routed for approval.	Users with a role of Plan Approver or other specific selected user.	Yes
Approval Notification Updates	Notification to selected users when a plan is approved or denied.	A sourcing plan is approved or denied.	The selected users on the Sourcing Options page (Assigned To, Plan Owner, Current Owner).	No
Cancellation of Plan	Notification to selected users when a sourcing plan is canceled.	A sourcing plan is canceled.	The selected users on the Sourcing Options page (Assigned To, Plan Owner, Current Owner).	No

Notification	Description	Trigger	Notifies	Generate Worklist Entry?
Reassignment of Task (previously assigned to)	Notification to previously assigned-to users that their tasks have been reassigned.	User reassigns tasks from the View Tasks by Resource page.	User who was originally assigned the tasks.	No
Reassignment of Task (newly assigned to)	Notification to newly assigned users that they have been assigned tasks.	User reassigns tasks from the View Tasks by Resource page.	Newly assigned to users.	No

Defining Basic Information for Sourcing Project Plans

Access the Define Sourcing Plan Basics page (Sourcing, Manage Plans, Plan Details)

Define Sourcing Plan Basics

Enter overall sourcing plan details. When done, proceed to the next step.

Copy From: Sourcing Plan   Continue
*Plan Name: Laptop plan
Description:

Start Date: 10/13/2009   Primary Category: HARDWARE
End Date: Secondary Category:
Overall Status: On Track   Baseline Spend: 160,000 USD
Current Phase: Final Spend: USD
*Plan Owner: Kenneth Schumacher   Last Updated By:
Current Owner: Last Update Date/Time:

Related Details

Historical Plans   Customize | Find | First 1 of 1 Last
Please select an historical plan.   Select   + −

Define Sourcing Plan Basics page

If you are creating a new sourcing plan:

1. Select a business unit that will use the sourcing project plan.

2. In the Plan ID field, enter a value (text, alphanumeric, or numeric) to be associated with the sourcing plan.

   If your system is set up for autonumbering, leave the *NEXT* value in the field.

3. In the Plan Type field, select *Sourcing Plan* or *Sourcing Template.*

Note. If you create a sourcing plan, you can save the sourcing plan as a sourcing template.

Adding Basic Plan Information

To add basic information to sourcing plans:

1. In the Copy From field, select *Sourcing Plan* or *Sourcing Template.*

   Click OK to access the Copy From Details page.

   See Chapter 6, "Creating and Using PeopleSoft Strategic Sourcing Project Plans," Creating New Sourcing Plans or Sourcing Templates Using the Copy From Feature, page 74.

2. Add other basic sourcing plan information such as plan name, description, start and end dates, assigned to, and so on.

Available Fields Dependent upon Plan Type

Plan Type	*Available Fields*
Sourcing Plan	Copy From
	Plan Name
	Description
	Start Date
	End Date
	Overall Status
	Current Phase
	Plan Owner
	Current Owner
	Primary Category
	Secondary Category
	Baseline Spend
	Final Spend
	Related Templates
	Related Events
	Historical Plans
	Save Plan button
	Post Plan button
	Save as Template button

Plan Type	Available Fields
Sourcing Template	Copy From
	Plan Name
	Description
	Plan Owner
	Baseline Spend
	Primary Category
	Secondary Category
	Last Updated By
	Last Update Date/Time
	Save Template button

Name

Enter the name for the sourcing plan or sourcing template. This is a required field.

Overall Status

Displays the current overall status of the sourcing plan.

Final Spend

(Optional) Enter the final spend amount for this sourcing project.

Baseline Spend

(Optional) Enter an estimated spend for this sourcing project.

Save Plan

Click this button to save the sourcing plan with a status of New. You can continue to edit the sourcing plan.

Save Template

Click this button to save the sourcing template. This button is available only when you are saving a sourcing template.

Post Plan

Click this button to post the plan and route it for approval, if required. This button is available for sourcing plans only.

If you decide to save the plan as a template, a copy of the sourcing plan is created and saved as a template.

The system sends notification to the appropriate individuals and includes a link to the My Assigned Tasks page. The notification contains the task ID, task description, start date, and end date for each task.

After you post the initial version of the plan, the start and end dates of all tasks are saved as baseline dates, which can be used to measure the actual dates against the original plan dates.

Note. If the start date has not passed when you post the plan, the status of the plan remains as Posted.

Save as Template

Click this button to save the plan as a template for future use with other sourcing plans.

Related Details

Enter Plan Details	Click to access the Define Sourcing Plan Details page, where you can define details such as tasks associated with the plan.
	See Chapter 6, "Creating and Using PeopleSoft Strategic Sourcing Project Plans," Entering Sourcing Plan Details, page 78.

Creating New Sourcing Plans or Sourcing Templates Using the Copy From Feature

Access the Copy From Details page (select Sourcing Plan or Sourcing Template in the Copy From field on the Define Sourcing Plan Basics page, and then click OK).

Copy From Details page

Copy Options

Copy Options	Select a copy option:
	• *Copy Only Selected Tasks:* Select specific tasks to be copied.
	• *Copy Summary and Tasks:* Select to copy the entire sourcing plan and related tasks.
	• *Summary (No Tasks):* Select to copy just the summary information and no tasks.

Copy Method   Select a copy method:

- *Append:* Select to add to existing details. You can use this option with the copy option of *Copy Only Selected Tasks.*

- *Override:* Select to override existing details. This option is available only with the copy options of *Copy Summary and Tasks* and *Summary (No Tasks).*

Search Criteria

Select the criteria to narrow your search:

Copy From Value	Available Search Criteria Fields
Sourcing Plan	Plan ID Category Plan Name Plan Owner
Sourcing Template	Template ID Category Template Name Template Owner

Search   Click to retrieve the sourcing plan or sourcing template that meets the search criteria.

Results appear in the Search Details area of the page.

Viewing Criteria to Be Copied

The information displayed in the Search Results group box varies depending upon whether you are searching for sourcing plans or sourcing templates.

This table outlines the information to be copied that is displayed in the Search Results group box.

Copy From	Copy Option	Copy Button Search Results
Sourcing Plan	Copy Only Selected Tasks	Select Tasks
Sourcing Plan	Copy Summary and Tasks	Select Tasks
Sourcing Plan	Summary (No Tasks)	Copy
Sourcing Template	Copy Only Selected Tasks	Select Tasks

Copy From	Copy Option	Copy Button Search Results
Sourcing Template	Copy Summary and Tasks	Select Tasks
Sourcing Template	Summary (No Tasks)	Copy

Selecting Tasks to Copy

Access the Select Tasks to Copy page (click the Select Tasks link on the Copy From Details page).

Copy From Task Select page

Sourcing Plan Summary

Select Tasks to Copy

Plan ID: PLN0000001 Plan Name: Laptop Replacement

☑ Select All   ☐ Clear All

Tasks		Customize | Find | View All | ⬈ First ◀ 1-15 of 15 ▶ Last
	Task ID	**Task Name**
☐	1	Laptop Replacement Project
☐	1.1	Purchase New Laptops
☐	1.1.1	Determine # of new laptops req
☐	1.1.2	Create and post a RFQ
☐	1.1.3	Receive Bids
☐	1.1.4	Analyze and Award Event
☐	1.1.5	Send order to vendor(s)
☐	1.1.6	Receive shipment of laptops
☐	1.2	Sell Old Laptops
☐	1.2.1	Swap old laptops for new lapto
☐	1.2.2	Compile list of laptops to be
☐	1.2.3	Create a sell auction event
☐	1.2.4	Receive Bids
☐	1.2.5	Analyze and Award Event
☐	1.2.6	Ship laptops to winning bidder

Copy Tasks

Select Tasks to Copy page

Select the tasks that you want to copy. When you are finished, click the Copy Tasks button. The system copies the selected tasks to the sourcing plan or sourcing template.

Click the Return to Copy From Details link to return to the Copy From Details page.

Click the Return to Plan Summary link if you do not want to select anything to copy.

Entering Sourcing Plan Details

Access the Define Sourcing Plan Details page (click the Details button on the Define Sourcing Plan Basics page).

Define Sourcing Plan Details page: Schedule tab

Recalculate Schedule	Click to recalculate the schedule based on the current information including each task's duration days and any predecessor tasks. Click this button after you have made any changes to the task information.
Clear All Dates	Click this button if you want to deselect all of the dates that are currently assigned to the task. You can then recalculate the schedule using dates that you manually enter. Use this button also if you made manual changes but then decided to back out the changes.
⇨ ⇦ ⇧ ⇩	Click an arrow to indent, outdent, move up, or move down a task. You create subtasks by indenting a task under another task.
✂	Click to cut a row from the grid. You must first select the Select check box by the row or place the cursor in the row to be cut. Use this when you want to cut and paste the row to a different location.
🗐	Click the Copy button to copy a row.
📋	Click the Paste Row button to paste a row into the grid.
↩	Click the Undo button if you want to undo the last action such as cutting or pasting a row.
🗑	Click the Delete button to delete a row. You must first select a row to delete it. After you have deleted a row, you cannot paste it back into the grid because it is deleted *permanently*.
·🗐	Click the Add a Row button to add new rows. You must first select a row in the grid after which you want to add more rows.

| **Number Rows** | Enter the number of blank rows to be inserted into the grid. You must first select the row in the grid after which you want the new rows to appear. |

Sourcing Plan Tasks

| ☐ | Select to select the task line that you want to indent, outdent, move up, or move down a task in the grid. |

| **Task Name** | Enter a short description of the task. |

| **Duration (Days)** | Enter the total number of days that you anticipate the task will take. |

| **Start Date** | This field is system-generated based on the creation date for the sourcing plan. It is editable and displayed for sourcing plans only. |

| **End Date** | For new sourcing plans, you can leave this field blank and the system will automatically calculate this date using the value that you entered in the Duration (Days) field. If you are viewing or revising an existing sourcing plan, this field displays the end date based on the date of the last task. |

| **Assigned To** | Select the individual to whom the tasks should be assigned. If you are revising the plan, you can also change the tasks to another individual. |

| **Task Status** | Select a value to indicate the current status of the task. Values are: |

- *Complete*

- *In Progress*

- *Not Start*

| **Completed Requirements** | This display-only field indicates the completed requirement information for a task. |

More Dates Tab

Use this tab to add additional details to the sourcing plan.

Define Sourcing Plan Details page: More Dates tab

| | Click the Details button to view or add additional task details. |
| Click the Predecessor Tasks button to view or add predecessor tasks that must be completed before the task can begin. |

| **Baseline Start Date** and **Baseline Finish Date** | Enter start and finish dates for the task. |
| | **Note.** Use this for tasks that do not have any subtasks. |

| **Actual Start Date** and **Actual Finish Date** | Enter the actual start and finish dates for the task. |

| **Deadline Date** | Enter the date by which the task must be completed. If you want the system to calculate the deadline date, the system will use the end date of the task plus the number of days specified in the grace period. |

| **Milestone** | Select the check box for the task that you want to designate as a milestone task. Reporting can be performed using project milestones. |

User Fields Tab

You can optionally add other information to the sourcing plan by using these user-defined fields.

Note. This page is available only for sourcing plans.

Accessing Other Pages from the Sourcing Plan Details Page

| **Return to Plan Summary** | Click to return to the Define Sourcing Plan Basics page. |

| **View Gantt Chart** | Click to view the sourcing plan in a Gantt chart format. |

Viewing Sourcing Plans Using a Gantt Chart

Access the Strategic Sourcing Project Plan page (click the View Gantt Chart link on the Define Sourcing Plan Basics page).
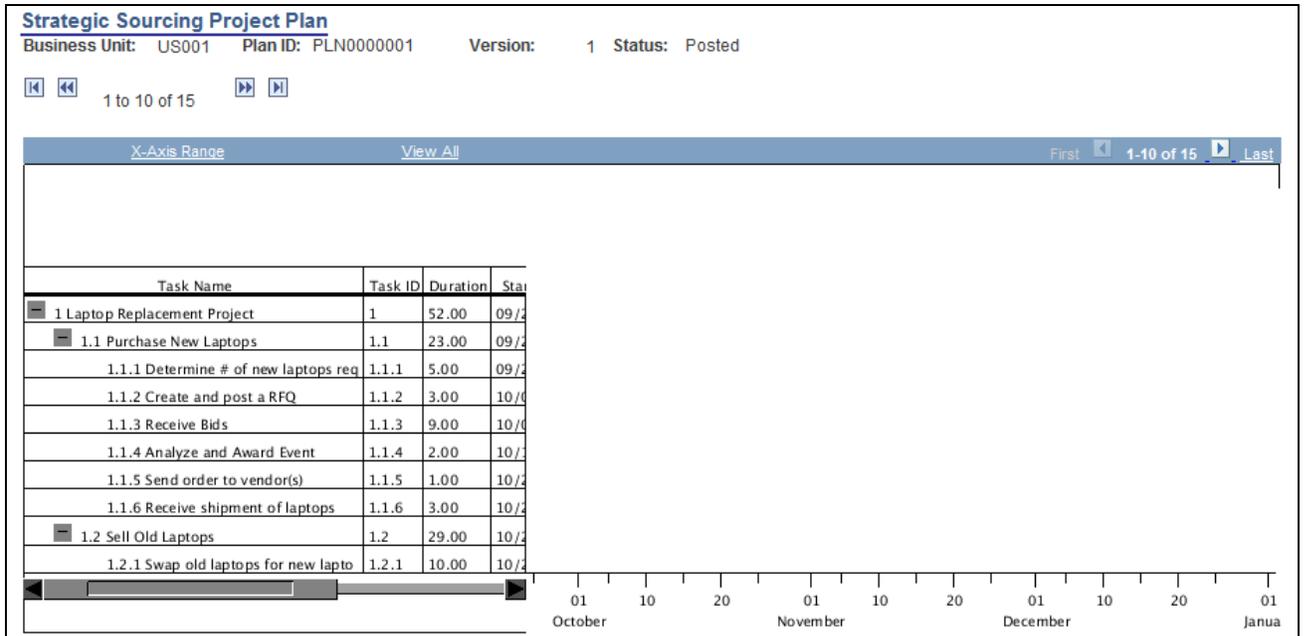
Strategic Sourcing Project Plan page (Gantt chart)

View the sourcing project plan using a Gantt chart.

Viewing or Adding Predecessor Tasks

Access the Task Predecessor Detail page (click the Predecessor Task button on the Define Sourcing Plan Basics page).

Task Predecessor Detail page

View or add predecessor tasks.

The start date of the selected task is based on the end date of the predecessor tasks. That is, a task cannot start before the end date for the predecessor.

Viewing or Adding Sourcing Plan Details

Access the Sourcing Plan Details page (Sourcing, Manage Plans, Plan Details).

Sourcing Plan Details page

Additional Details	View, add, or revise additional details for the task.
Instructions	View, add, or revise any special instructions.
Description	View, add, or revise the description for the task.

Grace Days   Enter the number of days to be used as a grace period for this particular
                                  task. The grace period indicates the number of days that a task can be past-
                                  due before the deadline date.

                                  Note. The system calculates the deadline date for the task by using the end
                                  date of the task plus the number of days specified in the grace period.

Task Completion Requirements

Sequence Number   Enter the sequence number for the task. This is a required field.

Requirement Type   Select a value to indicate the type of requirements needed for the task to be
                                  marked as complete. This is a required field.

                                  • *Attachment:* You must attach a file.

                                  • *Comment:* You must add a comment.

                                  • *Sourcing Event:* The completion of the task depends on an action
                                    related to a sourcing event.

                                  Note. You can add additional completion requirements for each task.
                                  However, if multiple completion requirements exist, then *all* the
                                  requirements must be met before the task can be considered complete.

Description   View, add, or revise the description for the requirements in order for the
                                  task to be complete.

Completion Method   Select a value to indicate the method that could cause the status of the task
                                  to be updated automatically to Complete. This field is available only with
                                  the requirement type of *Sourcing Event.*

                                  • *Event Approved*

                                  • *Event Awarded*

                                  • *Event Ends*

                                  • *Event Posted*

                                  • *Event Starts*

Task Comments

Comments   (Optional) Enter any comments relating to the task.

Viewing and Managing Tasks by Resource

This section discusses how to:

- Manage plans using the Sourcing Plan Workbench.

- View assigned sourcing plan tasks.

- View and update task information.

- View and manage tasks by resource.

Pages Used to View and Manage Tasks by Resource

Page Name	Definition Name	Navigation	Usage
Sourcing Plan Workbench	AUC_PLN_WKBNCH_PG	Sourcing, Manage Plans, Plan Workbench	Manage sourcing plans. You can cancel and create new versions.
Sourcing Plan Task Summary	AUC_MY_TASKS_PG	Sourcing, Manage Plans, My Sourcing Plan Tasks	View tasks that are assigned to you.
View and Manage Tasks By Resource	AUC_PLN_VTR_PG	Sourcing, Manage Plans, View Tasks by Resource	View and manage tasks by resource.
Update Task Information	AUC_PLN_TSK_PG	Click a link in the Task ID column on the View and Manage Tasks By Resource page.	View task details.

Managing Plans Using the Sourcing Plan Workbench

Access the Sourcing Plan Workbench page (Sourcing, Manage Plans, Plan Workbench).

Sourcing Plan Workbench page

Search Criteria

Select values in the fields in the Search Criteria group box to narrow your search.

Sort Plans By

Select a value to specify how to sort the sourcing plans:

- *Current Owner*
- *Plan ID*
- *Plan Name*
- *Plan Status*

Sort Order

Select the order in which you want the sourcing plans to appear. Values are *Ascending* and *Descending*.

Only show Plans that I own

Select to retrieve only the plans that you own or of which you are the current owner.

Note. The role of Plan Approver allows users to view sourcing plans that are not owned by them.

Use my search defaults

Select this check box if you want to use the search defaults.

Default Search Preferences

Click to define default search preferences. You must define default search preferences before you can use the Use my search defaults field.

Search

Click to retrieve the sourcing plans that meet the search criteria.

Reset   Click this button if you want to revise the search criteria.

Search Results

Plan ID   Click the link for the sourcing plan that you want to view or edit.

❌   Click the Cancel button to cancel the sourcing plan. After you have
                                       confirmed the cancellation for the sourcing plan, the plan status is changed
                                       to Canceled.

                                       If subsequent tasks are associated with the sourcing plan, they will also be
                                       canceled.

📄   Click the Create New Version button to create a copy of the current plan
                                       version. The system updates the status of the current plan version to
                                       Inactive. The system creates a new plan version, and increments the version
                                       number by 1.

                                       This option is available for any sourcing plans that do not have a status of
                                       Canceled or Complete.

📋   Click the Approval Status button to view any sourcing plans that have been
                                       routed for approval.

Viewing Assigned Sourcing Plan Tasks

Access the Sourcing Plan Task Summary page (Sourcing, Manage Plans, My Sourcing Plan Tasks).

Sourcing Plan Task Summary page

Not Completed, Completed,   The number of tasks is displayed.
and **All Tasks**

All Tasks

Task ID   Click to access the Update Task Information page.

Viewing and Updating Task Information

Access the Update Task Information page (click a link in the Task ID column on the View and Manage Tasks by Resource page).

Update Task Information page

Task Status   You can update the status here. Values are *Complete, In Progress,* and *Not Started.*

Actual Start Date   Enter the date that you began to work on the task.

Actual Finish Date   Enter the date that you completed the task.

Return to My Tasks   Click to return to the Sourcing Plan Task Summary page.

Viewing and Managing Tasks by Resource

Access the View and Manage Tasks By Resource page (Sourcing, Manage Plans, View Tasks by Resource).

View and Manage Tasks By Resource page

Note. This page can be accessed by plan owners only.

To reassign tasks:

1. Enter values in various fields to narrow the selection criteria.

2. Click Search to retrieve the tasks that meet the selection criteria.

3. Use the Assigned Tasks group box to reassign the tasks.

4. Click Save to complete the task reassignment process.

Approving Strategic Sourcing Project Plans

Sourcing plans that require approval are routed only to users with the role of Plan Approver. Sourcing plans must be posted before they can be approved.

This section discusses how to:

• Post Strategic Sourcing plans.

• Approve or deny Strategic Sourcing plans.

Page Used to Approve Strategic Sourcing Plans

Page Name	Definition Name	Navigation	Usage
Sourcing Plan Approval	AUC_PLN_APP_PG	Select Worklist, Worklist. Click the sourcing plan that is pending approval.	Approve or deny sourcing plans.

Posting Strategic Sourcing Plans

Access the Sourcing Plan Workbench page (Sourcing, Manage Plans, Plan Workbench).

Posting Sourcing Plans

To post a sourcing plan for approval:

1. Select the sourcing plan that you want to post.

    You can also post a sourcing plan by using the Define Sourcing Plan Basics page (Sourcing, Manage Plans, Plan Details).

2. Select the sourcing plan for posting.

    A new window opens that accesses the Define Sourcing Plan Basics page.

3. Click the Post Plan button.

Approving or Denying Strategic Sourcing Plans

Access the Sourcing Plan Approval page (Worklist, Worklist, then click the sourcing plan that is pending approval).

Sourcing Plan Approval page

Review/Edit Approvers	If approvals are required, the appropriate individuals' names appear. Use this group box to edit the approvers.
Approval Comments	Add any comments concerning the approval or denial of the sourcing plan.
Approve	Click to approve the sourcing plan.
Deny	Click to deny (disapprove) the sourcing plan.

The plan owner receives a notification indicating whether the plan was approved or denied. The status of the sourcing plan is updated after the action of Post or Approval has occurred.

Chapter 7

Creating and Using Bid Factors

This chapter provides an overview of bid factors and discusses how to:

- Create bid factors.

- Create bid factor groups.

Understanding Bid Factors

The PeopleSoft Strategic Sourcing bid factor function enables you to evaluate events based on factors such as price, warranties offered, lead time, and product quality. Bid factors are questions bidders must answer about their products, services, or company.

You set weightings for each bid factor, letting bidders know how much value you give to that portion of their bid. Price is by default the first bid factor of any buy or sell event. It is required for auction events, and you set a weighting for it. In some events, price might be the most important consideration, so you give it a 70 percent weighting. Or the color of the product might be so significant that you give it a 50 percent weighting.

If the event is an auction, bid factors of type text cannot be weighted. This is because no method is available to automatically score answers that are given in text (for example, answers to a bid factor that asks, "Describe your quality processes"). PeopleSoft Strategic Sourcing automatically assigns this a weight of zero, enabling you to collect this useful information without affecting bid scoring. If the event is an RFx (request for quote) or RFI (request for information) event, you can manually score text responses during bid analysis.

You can also create bid factors that you do not display to the bidders, but instead answer during the analysis of the bids. These bid factors can be for subjective responses such as current business relationship or interview results.

You, the creator, can see the scores and can even edit the weighting percentages of the bid factors to consider what-if scenarios for RFx and RFI events.

You can also create bid factor groups that contain multiple bid factors. When you add a bid factor group to an event, the system automatically assigns the bid factors that are assigned to that group to the event.

This section discusses:

- Header bid factors vs. line bid factors.

- Total costing modeling.

- Scoring vs. weighting.

- Line weighting vs. bid factor weighting.

- Default rule assignment.

- Ad hoc bid factors.

- Required or mandatory response designation.

- Price components.

- Contract clauses.

- Contract agreements.

- Bid factor groups.

- Automatic bid factor population with queries.

Header Bid Factors vs. Line Bid Factors

Header bid factors relate to the overall event, whereas line bid factors relate only to the specific line.

Header bid factors cover the entire event. For example:

- Is this a minority-owned or woman-owned business?

- In what state is the corporate headquarters located?

- Is the company ISO certified?

Because for any bid factor you can change such variables as the range for best and worst responses, the ideal response, and bid factor weighting, you can use the same bid factor for the event and for one or more line items. This ensures accurate weighting and responses.

Line bid factors can be set for individual lines. For example:

- For a sale of sporting goods, color might be an important factor.

  You can set different colors or weightings for a color list bid factor on the line item for tents, backpacks, and hiking boots.

- You can set ideals and weightings that, for the line item, differ from the same bid factor set in the header.

  For example, suppose that on the header you set a delivery bid factor, with an ideal delivery time of four weeks. You can set, on a line item, a delivery bid factor with an ideal delivery time of six weeks.

Total Cost Modeling

With total cost modeling, you can analyze bids based on three different criteria: lowest price, best score, and lowest total cost. All three methods can be used simultaneously to give you the most information for making the best award decision.

By using this feature, you can designate cost contributions for selected bid factors. Depending on the type of bid factor, costs can be calculated based on the bidder's bid price, the bidder's bid quantity, a predefined cost range, or a user-defined cost. The system can then calculate a cost related to each bidder's response to a bid factor, as well as total line cost and total event cost. This information can then be used either during manual analysis, or by the optimization engine to determine an ideal award.

The following example illustrates how the cost modeling can be used. You are purchasing an item that has a warranty bid factor associated with it. You are asking the bidders to indicate the length of warranty provided for the item, with a range of one year to five years. The longer the warranty period provided, the less your organization will need to pay for maintenance and repair costs. You determine that each extra year of warranty provided saves your organization $50 in maintenance and repair per unit. You can assign this cost to the warranty bid factor so that the total cost for this bid factor will be calculated based on the bidder's response. One bidder may bid $1,000 per unit but only provide a one-year warranty, while another bidder may bid $1,100 per unit but provide a five-year warranty. Even though the first bidder has a lower bid price, the second bidder will have an overall lower cost because the bidder is providing the full five-year warranty.

When you create a sourcing event, the bid factor cost information appears based on the associated defaulting rules. You can add or modify the cost information.

In addition, any changes made by event collaborators are tracked and can be viewed on the Review Event Collaboration page.

For auction events, bidders can compete based on score or price only.

You can also use the optimization feature to determine an ideal award based on minimizing the total cost of the award.

Scoring vs. Weighting

Consider these three factors regarding scoring vs. weighting:

- The score depends on how close the answer to the bid factor comes to the ideal answer.

- The weighting is based on how important the bid factor is to the overall line or event.

- The final score is the average of the score and the weighting.

The header and line bid factors are scored separately; each bidder gets two scores. The following table outlines how scores and weighting are used by the system:

Bid Factor	Best/Worst/Ideal	Bidder's Response and Score	Weighting and Score
Header: Is the headquarters located in North America?	Ideal: Yes	Yes = 100 percent	70 percent = 70 (70 percent of the score of 100)
Header: Is the company ISO 9000 certified?	Ideal: Yes	No = 0 percent	30 percent = 0 (30 percent of the score of 0)

Bid Factor	Best/Worst/Ideal	Bidder's Response and Score	Weighting and Score
Combined header scores.	NA	50 (100 + 0 / 2) 50 is the header score if no weightings are set.	70 (100 percent * 70 percent + (30 percent * 0 percent) 70 is the header score if these weightings are set.
Line: How many pages-per-minute can be processed?	Best: 20 Worst: 1	10 = 50 percent	30 percent = 15 (30 percent of 50)
Line: How many years does the warranty cover?	Best: 10 Worst: 1	8 = 80 percent	70 percent = 56 (70 percent of 80)
Combined line scores.		65 (50 + 80 / 2) 65 is the line score if no weightings are set.	71 ((50 percent * 30 percent) + (80 percent * 70 percent)). 71 is the line score if these weightings are set.

Line Weighting vs. Bid Factor Weighting

You can set two types of weighting on a line item:

• The bid factor weighting, meaning how important the bid factor is to an overall event.

  Set bid factor weightings if you want to factor the weightings into the bid scoring.

• The line item weighting, meaning how important that specific item or service is to the overall event.

  If you do not set specific line weightings, the lines are weighted equally.

For example, in an event to purchase central processing units (CPUs), monitors, and keyboards, the CPUs might be more important to you than the keyboards. You weight the line item for the CPUs at 50 percent, the monitors at 30 percent, and the keyboards at 20 percent.

The following table uses this example. The bidder scores high on bid factors for the line items that have a low line weight. After line weighting is calculated, the bidder's per-line scores decrease:

Example Score with Bid Factor Weightings Calculated	Line Weight	Final Score for Each Line Item
CPU = score of 80	50 percent	40 (80 * 50 percent)
Monitor = score of 90	30 percent	27 (90 * 30 percent)
Keyboards = score of 100	20 percent	20 (100 * 20 percent)
		87 (Total combined line score)

Default Rule Assignment

You can create default rules for bid factors and bid factor groups. Default rules can be for header or line bid factors. For example, if you have a line bid factor group default rule called Apparel, and you assign an item ID of 10006 to this rule, the bid factor group Apparel always appears by default on any event line containing the item 10006.

You can default bid factors and bid factor groups based on item categories, item IDs, start price, extended price, and event quantities. Bid factors and groups can be associated with business units or departments to provide additional filtering options.

Ad Hoc Bid Factors

The bid factors that you create on the Bid Factors page are available to use in any of the events.

You can also create ad hoc bid factors, specific to an event, when you create the event. An ad hoc bid factor is valid only for the event in which you create it and is not available for any other events.

Use the Event Bid Factors page to add or edit user-defined response costs for a bid factor.

See Also

Required or Ideal Response Designation

You can designate that a response is required for a bid factor. If required, the bidder must enter a response for the specified bid factor before successfully posting a bid.

You can also designate that the ideal or best response is required for a bid factor. The bidder's response must match the specified best or ideal response for the bid to be considered for award.

Price Components

You can break out the price bid factors into related and measurable components, such as material, labor, shipping, and so forth. This enables you to gain a better understanding of what makes up the quoted bid price as well as negotiate on specific price components, thereby increasing your overall negotiation power.

Contract Clauses

Event creators can create sourcing clauses that can be associated with bid factors and these clauses provide additional legal, policy, or other terms to bidders during the bidding process. If a sourcing event is awarded to a contract, those clauses can then be passed onto the awarded contract.

Important! You must have PeopleSoft Supplier Contract Management installed to use this feature.

You can associate contract clauses with bid factors using the Assign Contract Clauses page.

See

Contract Agreements

You can also map a bid factor to one or more contract agreements. If a sourcing event is awarded to a contract, the bidder's awarded value for each bid factor is passed on to the contract agreement and can be tracked for compliance.

Important! You must have PeopleSoft Supplier Contract Management installed to use this feature.

You can associate contract agreements with bid factors using the Assign Contract Agreements page.

See

Bid Factor Groups

You can assign multiple bid factors to a bid factor group. The total of the assigned bid factor weightings must equal the weighting of the bid factor group. The system provides the bid factor group weightings first over individual bid factor weightings when providing defaults.

You can select a bid factor group during event creation and all associated bid factors are added to the event. You can also assign bid factor groups to business units and departments.

Automatic Bid Factor Population with Queries

You can associate a bid factor with a specified PeopleSoft query, which automatically populates bid factor responses based on the query results. When a bidder selects to bid on an event, the query that is associated with the bid factor is run and the resulting values are entered in the respective bid factor response fields.

For example, you could have a header bid factor asking whether the bidder is a minority vendor. This information is collected when the bidder registers and is on the vendor record. You can build a query by using the vendor and bidder records, and as part of the bidder event response, the system runs the query and automatically populates the response with the minority vendor information.

You can also extract external supplier information, such as supplier performance, to weight and factor in during bid analysis. You can map a supplier performance bid factor to the Supply Chain Warehouse database or to a Dun and Bradstreet database.

See Also

PeopleSoft Supplier Contract Management 9.1 PeopleBook, "Defining Supplier Contracts"

PeopleTools PeopleBook: PeopleSoft Query

Creating Bid Factors

To set up bid factors, use the Bid Factor Setup (BID_FACTOR_COMP) component.

This section lists common elements and discusses how to:

* Specify bid factor attributes.

* Use total cost modeling.

* Use price components.

* Assign business units and departments to bid factors.

* Assign defaults and rules.

* Assign responses based on queries.

* Assign contract clauses to bid factors.

* Assign contract agreements to bid factors.

See Also

Common Elements Used in This Section

Type

Determines what bid factor fields appear on the page.

Values are:

- *Attachment:* A file attachment is required in the response. If a response is required in the bid factor, then the bidder must supply an attachment. This option follows the same rules as Text bid factor type when it comes to scoring; bid factor is weighted zero for auction events.

- *Date:* A range of calendar dates.

- *List:* A list of attributes, such as color or size. For list bid factors, you can designate whether multiple selections are allowed. For example, you can have a list bid factor asking what colors are available for an item, with list items of black, red, blue, yellow, and white. Bidders select one or more of the available list items. If you do not allow multiple selections for a list bid factor, the bidder can select only one list item.

- *Monetary:* A range of costs that are related to the bid factor.

- *Numeric:* A range of figures, such as length of service contract.

- *Separator:* A header bid factor that is not weighted and does not require a response from bidders.

- *Text:* A question requiring a text answer. In auction events, this type of bid factor is automatically weighted zero.

- *Yes/No:* A text question requiring a yes or no answer.

Question

Unlimited length field in which you can ask the bidder a question.

Display Bid Factor

Click to display the bid factor to bidders. If this option is not selected, the event creator or any collaborators add their input to bid factors that are hidden to bidders.

Bid Factor Response Required

Click to indicate that a response is required for this bid factor.

Ideal Response Required

Click to indicate that a bidder must respond with the best or ideal response for the bid to be considered. If the bidder doesn't provide the best or ideal response for one or more bid factors, the bid is disqualified and unavailable for award.

Pages Used to Create Bid Factors

Page Name	Definition Name	Navigation	Usage
Bid Factor Setup	BID_FACTOR_PNL	Sourcing, Create Events, Bid Factor Setup	Specify the attributes of the bid factor. Use this page to assign total cost modeling to overall bid factors.
Assign Business Units and Departments to Bid Factor	BID_FCTR_BUDEPT	Click the Assign Business Units and Departments link on the Bid Factor Setup page.	Assign bid factors to business units or departments to facilitate searching.
Assign Defaulting Rules to Bid Factor	BID_FACTOR_LINE	Click the Assign Additional Defaults and Rules link on the Bid Factor Setup page.	Assign a default rule based on item ID, item category, price, or quantity to the bid factor.
Assign Response Query to Bid Factor	BID_FCTR_QRY	Click the Assign Response Query link on the Bid Factor Setup page.	Associate queries with bid factors to automatically populate bid factor responses based on the query results.
Assign Contract Clauses	BID_FCTR_CLAUSE	Click the Assign Clauses link on the Bid Factor Setup page.	(Optional) Associate clauses with bid factors. **Important!** You must have PeopleSoft Supplier Contract Management installed to use this feature.
Select a Clause	CS_CONTENTS_SEARCH	Select By Reference Text and then click the Search button on the Assign Contract Clauses page.	Search for clauses to be associated with bid factors. **Important!** You must have PeopleSoft Supplier Contract Management installed to use this feature.
Search for All Content Instances	CS_CONTENTS_XREF	Click the Where Used button on the Select a Clause page.	View where the particular clause has been used.

Page Name	Definition Name	Navigation	Usage
Dependent Clauses	BID_FCTR_CLSDEP	Click the View Dependent Clause button on the Assign Contract Clauses page.	View any dependent clauses for the bid factor. **Note.** This button is available only if dependent clauses exist. Dependent clauses do not appear on contracts.
Assign Contract Agreements	BID_FCTR_AGRMNT	Click the Assign Response Query link on the Bid Factor Setup page.	Assign contract agreements to bid factors. **Important!** You must have PeopleSoft Supplier Contract Management installed to use this feature.

Specifying Bid Factor Attributes

Access the Bid Factor Setup page (Sourcing, Create Events, Bid Factor Setup).

Bid Factor Setup page (using a Monetary bid factor type)

The bid factors that you create on the Bid Factor Setup page become available to be used in any sourcing event.

You can also create ad hoc bid factors—specific to an event—when you create the event. An ad hoc bid factor is valid only for the event in which you create it and is never available for other events.

Price Bid Factor	Indicates that this bid factor is used as the line bid price factor on events. Only one bid factor per setID can be a price bid factor. Selection enables you to enter price components. This check box becomes available only for bid factor types of *Monetary*.
	Note. You must have a price bid factor for auction and RFx events.

Bid Factor Types and Available Fields

This table lists the fields that are available depending upon which bid factor type is selected:

Bid Factor Type	Available Fields	Cost Option (Factor Cost Based on Field)
Attachment: If a bid factory response is required, then the bidder must provide an attachment in the response.		Bid Price: Based on per unit Bid Quantity: Based on per unit NA User Defined: Based on total cost
Date: All calculations are based on the number of days between the best, worst, and bidder's response.	Currency: Required if you are assigning a cost contribution Best (date) Worst (date)	Bid Price: Based on unit cost Bid Quantity: Based on per unit Cost Range: Based on per unit or total cost NA (not applicable) User Defined: Based on total cost
List: All calculations are based on the cost associated with the selected list response. If multiple selections are allowed, the cost is the sum of the costs associated with selected list responses.	In the List Items group box: • List Items • Weighting • Unit/Flat Cost: Appears if you selected to factor in costs. Currency: Required if you are assigning a cost contribution. Ideal: (Optional) Indicate the ideal response in this free-form field. Allow Multiple Selections: You can allow bidders to select multiple list items.	Bid Price: Based on per unit Bid Quantity: Based on per unit Fixed Cost: Based on total cost NA
Monetary: Calculation is based on the bidder's response to the monetary bid factor. The system applies monetary costs per unit or total cost.	Currency: Required if you are assigning a cost contribution Best Worst	NA: Based on per unit or total cost
Numeric: All calculations are based on the difference between the best, worst, and bidder's response.	Currency: Required if you are assigning a cost contribution Best Worst UOM (unit of measure)	Bid Price: Based on per unit Bid Quantity: Based on per unit Cost Range: Based on per unit or total cost NA User Defined: Based on total cost
Text: Calculation is based on the cost specified by the user during bid analysis.	Ideal	Bid Price: Based on per unit Bid Quantity: Based on per unit NA User Defined: Based on total cost

Bid Factor Type	Available Fields	Cost Option (Factor Cost Based on Field)
Yes/No: Calculation is based on what the Ideal response should be. If the ideal response should be Yes, and the bidder responds Yes, then the cost is based on the Best Cost value. If the bidder responds No, then the cost is based on the Worst Cost value.	Ideal group box: • Yes • No (default value) Ideal Currency: Required if you are assigning a cost contribution	Bid Price: Based on per unit Bid Quantity: Based on per unit Fixed Cost: Based on total cost NA

Using Total Cost Modeling

Access the Bid Factor Setup page (Sourcing, Create Events, Bid Factor Setup).

Cost Contribution

Factor Cost Based on   Select a value to use as a basis to factor the cost.

- *Bid Quantity:* The system calculates the cost based on the bidder's bid factor response and maximum bid quantity using the following formulas:

  For Numeric and Date bid factors: ((Absolute Value of (Bidder's response − Best Response) × Cost Contribution × Maximum Bid Quantity) = Total Cost

  For Text ID factors: Unit cost entered during analysis × Maximum Bid Quantity

  For List bid factors: Selected list items Unit Cost x× Maximum Bid Quantity

  For Yes/No bid factors: Bid Factor Response Unit Cost x Maximum Bid Quantity

- *Cost Range:* The system calculates the cost based on the bidder's bid factor response for numeric or date bid factors using this formula:

  (((Bidder's Response − Best Response) x ((Worst Cost − Best Cost) / (Worst Response − Best Response)) + Best Cost))) = Total Cost

  If the cost is applied per unit, the total cost will be multiplied by the maximum bid quantity.

- *Bid Price:* The system calculates the cost based on the bidder's bid factor response, maximum bid quantity, and unit bid price using the following formulas:

  For Numeric and Date bid factors: ((Absolute Value of (Bidder's response − Best Response) × Cost Contribution × Unit Bid Price × Maximum Bid Quantity) = Total Cost

  For Text bid factors: Cost Contribution x Bidder's Unit Bid Price x Maximum Bid Quantity

  For List bid factors: Selected list items Unit Cost x Bidder's Unit Bid Price x Maximum Bid Quantity

  For Yes/No bid factors:Bid Factor Response Unit Cost x Bidder's Unit Bid Price x Maximum Bid Quantity

- *Fixed Cost:* The system calculates the cost based on the bidder's bid factor responses using the following formulas:

  For List bid factors: Sum of the flat costs associated with the selected list items

  For Yes/No bid factors: If the bidder responds with the Ideal response, then the best cost is used. If the bidder does not respond with the Ideal response, the worst cost is used.

- *N/A:* A cost contributor does not apply for this bid factor.

  This is the default value.

- *User Defined:* The user enters a cost during analysis.

Apply Cost	Select *Per Unit* or *Total Cost.* This field is available only with *Cost Range.* For *Per Unit,* the system calculates the cost by multiplying the bidder's response by the maximum bid quantity to determine a total cost.

Note. You can designate a cost as a credit by entering a - (hyphen) in front of the cost value. For example, if you want to give a bidder a $5,000 credit if the bidder is ISO-certified, you can enter a value of -5,000 in the Best Cost field for that bid factor. If the bidder responds Yes to the question, the bidder will receive a $5,000 credit, which will lower the bidder's total cost.

Using Price Components

Access the Bid Factor Setup page using the price bid factor.

Price Bid Factor	Indicates that this bid factor is used as the line bid price factor on events. Only one bid factor per setID can have this indicator set to *yes.* When this option is selected, it enables entering price components.
Component	Enter a price component such as material, labor, tax, or profit. Enter price components only if you want bidders to specify the components for their bids. You can assign an unlimited number of components to the price.
UOM (unit of measure)	(Optional) Enter a UOM for each price component.
Weighting	Assign the weighting for this component. This can be used during analysis to determine the importance of each component on bids. The sum of the weighting for all price components must total 100 percent.

Assigning Business Units and Departments to Bid Factors

Access the Assign Business Units and Departments to Bid Factor page (click the Assign Business Units and Departments link on the Bid Factor Setup page).

Assign Business Units and Departments to Bid Factor page

Select the business units and departments to which you want to assign bid factors.

Assigning Defaults and Rules

Access the Assign Defaulting Rules to Bid Factor page (click the Assign Additional Defaults and Rules link on the Bid Factor Setup page).

Assign Defaulting Rules to Bid Factor page

You can assign default bid factors based on item categories, item IDs, line quantity, line start price, line extended price, or any combination of defaults. The system provides bid factor as a default when an event line meets any of the criteria that you set here.

You can assign default bid factors to the event header or to the applicable line.

You can set unique weightings at the rule level that differ from the weightings that you set at the overall bid factor level. These weightings override the weighting that you enter at the overall bid factor level.

You can also add total costing to bid factors by using the Cost Contribution group box on this page.

Cost Contribution

Use this group box to assign total cost modeling to the specific bid factor rule.

See Chapter 7, "Creating and Using Bid Factors," Using Total Cost Modeling, page 103.

Example

Consider a bid factor for warranty. At the overall bid factor level, you set a best to worst range of two to five years. You then create two separate rules and assign the bid factor to two categories:

• Hardware category, for which you set a best to worst range of two to six years.

• Equipment category, for which you set a range of five to ten years.

After bid factors are assigned to categories, you create an event with an item from the hardware category:

• All bid factors that are associated with the hardware category are automatically added to the event.

  You can delete any that are not relevant to the new event, or add more that are.

• These bid factors display the ranges that are related to that category; for this example, the range is two to six years for the warranty bid factor.

Assigning Responses Based on Queries

Access the Assign Response Query to Bid Factor page (click the Assign Response Query link on the Bid Factor Setup page).

Assign Response Query to Bid Factor page

After creating a query by using PeopleSoft query and associating it with a bid factor, you can test the query to ensure that it runs properly within the bid response application.

The Bidder Setid, Bidder ID, Bidder Type, and Bidder Location fields are used as query bind variables. The system uses the Query Result field to display test query help and query results.

Bidder Type   Select a value to be used for the query:

- *Bidder*

- *Customer*

- *Public*

- *Vendor*

Test   Click to test the query against the query bind variables.

Assigning Contract Clauses to Bid Factors

Access the Assign Contract Clauses page (click the Assign Clauses link on the Bid Factor Setup page).

Assign Contract Clauses page

Bid Factor Clauses

Contract clauses are defined on the Clause Definition page (Supplier Contracts, Manage Contract Library, Clauses).

See *PeopleSoft Supplier Contract Management 9.1 PeopleBook*, "Defining Contract Agreements."

Clause ID	Select a clause to add to the bid factor.
🔍	Click the Look up Clause ID button to display a list of valid clauses. This display lists the clause ID, description, and title of the clause.
Search	Leave the Clause ID field blank and click this button to retrieve all valid clauses. This search provides you with more details associated with the contract clause such as setID, approval status, or date ranges. This more complex search is discussed in the Searching for Contract Clauses or Viewing Where-Used Information section subsequently.
Full Text	The system displays the text associated with the contract clause to the sourcing bidders.
By Reference	The system displays only the reference text associated with the clause to the sourcing bidders.
View Dependent Clauses	Click to view any dependent clauses.
	Note. Dependent clauses cannot be transferred onto awarded contracts.

Searching for Contract Clauses or Viewing Where-Used Information

Access the Select a Clause page (click the Search button on the Assign Contract Clauses page).

Select a Clause page

Clause Attributes	Enter or select fields to narrow the search criteria such as clause ID, approval status, or created by.
Search	Click to retrieve clauses that meet the selected criteria.
Where Used Search	Click to view where clauses have been used.
Select	Click this button to select the contract clause that you want to associate with the bid factor.
OK	Click to return to the Bid Factor Setup page.

Assigning Contract Agreements to Bid Factors

Access the Assign Contract Agreements page (click the Assign Response Query link on the Bid Factor Setup page).

Assign Contract Agreements page

Note. Contract agreements are defined on the Contract Agreement Definition page (Supplier Contracts, Monitor and Update Agreements, Set Up Agreements, Contract Agreements).

See *PeopleSoft Supplier Contract Management 9.1 PeopleBook*, "Defining Contract Agreements."

Agreement Code	Select the agreement code to assign to the bid factor. Click OK to add the agreement to the bid factor and to return to the Bid Factor Setup page.
	Note. Only those agreement codes with the same type as the bid factor are retrieved. For example, a date bid factor returns only those agreement codes that have a *date* type.

Creating Bid Factor Groups

To set up bid factor groups, use the Bid Factor Group Setup (BID_FCTR_GRP_COMP) component.

This section discusses how to use bid factor groups.

Pages Used to Create Bid Factor Groups

Page Name	Definition Name	Navigation	Usage
Bid Factor Group	BID_FACTOR_GRP	Sourcing, Create Events, Bid Factor Group Setup	Assigns multiple bid factors to a group.
Search Bid Factor Groups	BID_FCTR_GRP_SRCH	Click the Select Bid Factor Group link on the Bid Factor Group page.	Search for bid factor groups by group code, business unit, or department.

Page Name	Definition Name	Navigation	Usage
Assign Business Units and Departments to Group	BID_FCTR_GRP_BU	Click the Assign Business Units and Departments link on the Bid Factor Group page.	Assigns bid factor groups to business units or departments to facilitate searching.
Assign Defaults and Rules to Group	BID_FCTR_GRP_RULE	Click the Assign Additional Defaults and Rules link on the Bid Factor Group page.	Creates default rules for bid factor groups.

Using Bid Factor Groups

Access the Bid Factor Group page (Sourcing, Create Events, Bid Factor Group Setup).

Weighting	Enter a default weighting for the group or for the bid factors that are associated with the group. The total of the bid factor weightings that are associated with the group must equal the weighting of the bid factor group. The system then calculates the total of the bid factors

You can add rows to include multiple bid factor codes for the bid factor group. If you select a bid factor group during event creation, all associated bid factors are added to the event.

The system looks to bid factor groups before individual bid factors when applying defaults. For example, you have a bid factor group of COMPUTERS that includes two bid factors: manufacturer, which is weighted 10 percent, and warranty, which is weighted 30 percent. The COMPUTERS bid factor group is assigned to item AP-001, which has a category of HARDWARE. You also have WARRANTY created as a bid factor, assigned to the HARDWARE category, and weighted 20 percent. If you add item AP-001, the system provides WARRANTY as a default based on the group rule, and therefore provides it a weighting of 30 percent, which overrides the individual bid factor rule that had the weighting of 20 percent.

Chapter 8

Preparing Strategic Sourcing Notifications

This chapter provides an overview of Strategic Sourcing notifications and discusses how to alter email templates.

Understanding Strategic Sourcing Notifications

PeopleSoft Strategic Sourcing provides the means to notify bidders of:

- Registration requests and approvals.

- Event invitations and event interest notifications.

- Bid responses and statuses.

PeopleSoft Strategic Sourcing also provides the means to notify internal users of:

- Registration and event approval requests.

- Collaboration requests and statuses.

- Event statuses, such as when an event is ready for analysis and award.

- Sourcing project plan and task statuses.

Email Notifications

The first email notice that is sent to bidders is either a registration confirmation email containing an assigned password or notification that the registration is routed for approval. Subsequent emails are automatically generated to advise bidders and internal users of the progress of the event.

PeopleSoft Strategic Sourcing delivers several standard email notices, which you can alter as needed. Some specific email notifications include links to a Web site or a PDF file attachment that provides further information.

Example of a notification PDF file

Altering Email Templates

To define notification templates, use the Notification Templates (WIL_TEMPLATE) component.

See *PeopleTools PeopleBook: Workflow Technology*.

This section discusses how to alter email templates.

Bidder Registration Notifications

PeopleSoft Strategic Sourcing includes the following notifications regarding bidder registration.

Registration Confirmation   Notifies bidders when they are successfully registered. Includes the assigned password.

Sourcing Approval   Notifies the registration approver that a bidder registration is submitted for review.

Sourcing Approved   Notifies the bidder that the registration request is approved.

Sourcing Denied   Notifies the bidder that the registration request is denied.

| **Sourcing Duplicate Information** | Notifies bidders that their registration information matches an existing bidder, vendor, or customer. |
| **Sourcing New Contact** | Notifies bidders contact that they have been added as a contact for a registered bidder. |

Event Creation and Status Notifications

PeopleSoft Strategic Sourcing includes the following event notifications.

Collaboration Notice	Notifies collaborators that they are invited to collaborate on an event.
Collaborator Removal	Notifies collaborators that their participation in the collaboration is no longer required
Collaboration Completion	Notifies the event creator that the collaboration ended either because the collaboration due date passed or all invited collaborators provided the necessary input.
Event Approval Next	Notifies event approvers that an event requires their approval.
MCF Agent Creation (MultiChannel Framework agent creation)	Notifies event creators that they are created as a MultiChannel Framework agent, which enables internal users to chat real-time with bidders using the MultiChannel Framework.
Event PDF Preview	Notifies the event creator that a preview of the sourcing event PDF file has been created. The PDF file is included in the notification.
Event Invitation	Notifies invited bidders that they are invited to participate in a sourcing event.
Event Interest	Notifies uninvited bidders that a public event is posted in which they may be interested based on their self-categorization preferences.
Event Edited	Notifies bidders that a previously posted event is edited.
RFI Invitation (request for information invitation)	Notifies bidders that they are invited to a request for information (RFI) event.
RFI Event Edited	Notifies bidders that a posted RFI event is edited.
Event Lot Update	Notifies bidders that associated event lot dates are updated.
Pause Notification	Notifies invited bidders that an auction event is paused.
Resume Notification	Notifies invited bidders that a paused auction event is resumed.
Event Cancellation	Notifies invited bidders that a posted event is canceled.

Bid Response and Status Notifications

PeopleSoft Strategic Sourcing includes the following event notifications.

Bid Notification	Notifies bidders that they successfully posted a bid.
Outbid Notice	Notifies bidders that they are outbid on one or more sourcing event lines.
Proxy Outbid	Notifies bidders that their current bid price has changed based on his proxy bid.
Event Extension	Notifies invited bidders that the event end date is been extended.
Bid Cancellation	Confirms to bidders that they canceled their bid.
Withdrawal Notification	Confirms to bidders that they are withdrawn from one or more event lines on a countered offer.
Bid Disallow	Notifies bidders that their bid is disallowed and therefore is canceled.
Bid Rejection	Notifies bidders that their bid is no longer being considered for an award.
Sourcing New Winner	Notifies bidders that they are the winning bidder due to a cancellation of a previous winning bid.

Analysis and Award Notifications

PeopleSoft Strategic Sourcing includes the following event notifications.

Sourcing Analysis Collab	Notifies collaborators that they have been invited to collaborate on bid analysis
Event Analysis Export	Sends an XML version for the bid analysis to selected users.
Non-Winning Bidder	Notifies nonawarded bidders that they are not selected for award.
Winning Bidder	Notifies awarded bidders that they are selected for award.

Sourcing Plan Notifications

PeopleSoft Strategic Sourcing includes the following sourcing plan notifications.

Task Assignment	Notifies users when a sourcing plan is posted.
Change of Overall Plan Status	Notifies selected users when the overall plan status changes.

Change of Overall Step Status	Notifies selected users when the overall task status changes.
Predecessor Task Completion	Notifies selected users when all of the predecessor tasks (steps) for a task have been completed.
Approval Required	Notifies plan approver that a sourcing plan requires approval.
Approval Notification Updates	Notifies selected users when a sourcing plan is approved or denied.
Cancellation of Plan	Notifies selected users when a sourcing plan is canceled.
Reassignment of Task	Notifies previously assigned to users that their tasks have been reassigned.
Reassignment of Task	Notifies newly assigned to users that they have been assigned tasks.

See Also

Pages Used to Alter Email Templates

Page Name	*Definition Name*	*Navigation*	*Usage*
Generic Template Definition	WL_TEMPLATE_GEN	PeopleTools, Workflow, Notifications, Generic Templates	Edit the text of notification boilerplate email templates. You can also modify the HTML that is associated with each template.
Define Template	WL_TEMPLATE	PeopleTools, Workflow, Notifications, Notification Templates	Edit the text of all boilerplate email templates except for bidder registration notifications. You can also modify the HTML that is associated with each template.

Chapter 9

Creating Events

This chapter provides an overview of PeopleSoft Strategic Sourcing events and discusses how to:

- Define basic event information.

- Add line items and line defaults to an event.

- Add comments and attachments to sourcing events.

- Add and maintain bid factors for an event.

- Use global policies and constraints with sourcing events.

- Invite bidders.

- Use event collaboration.

- Post events.

- Add and maintain sourcing event templates.

- Create request for information (RFI) events.

Understanding PeopleSoft Strategic Sourcing Events

This section lists a prerequisite, lists common elements, and discusses:

- Event creation.

- Event status.

- Event modification.

- Automatic proxy bidding.

- Alternate unit of measure conversion.

- Award beyond event quantity or amount.

- Amount only requisitions.

- Price adjustments.

- Requisition consolidations.

- Line groups.

- Discussion forums.

- Bidder downloads.

- Bidder removal.

Prerequisite

Before you create an event, you must set up user preferences so that you can create, buy, sell, or RFI events.

See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining User Preferences," Defining Strategic Sourcing User Preferences.

Common Elements Used in This Chapter

Event ID   Enter a specific value to identify this sourcing event. If you are using autonumbering, leave the field value as *NEXT*.

GoTo   Use this drop-down list to access any of these pages:

- Bidder Invitations

- Event Bid Factors

- Event Constraints

- Event Contact Details

- Event Overview

- Event Settings and Options

- Line Items

Event Creation

Three types of events exist in PeopleSoft Strategic Sourcing:

- A *sell* event: the sale of goods that you own (equivalent to a forward auction).

- A *buy* event: the purchase of goods or services (equivalent to a request for purchase or quote or a reverse auction).

- An *RFI* event: a request for information.

The event creator must have the appropriate roles to create events. PeopleSoft Strategic Sourcing comes with two user roles: the Event Buyer role and the Event Seller role. The Event Buyer role can create buy events; the Event Seller role can create sell events. However, when you create events, the allowable event formats and types are based on user preference settings, not on roles.

This diagram illustrates the Sourcing Offer process for procuring items or services:
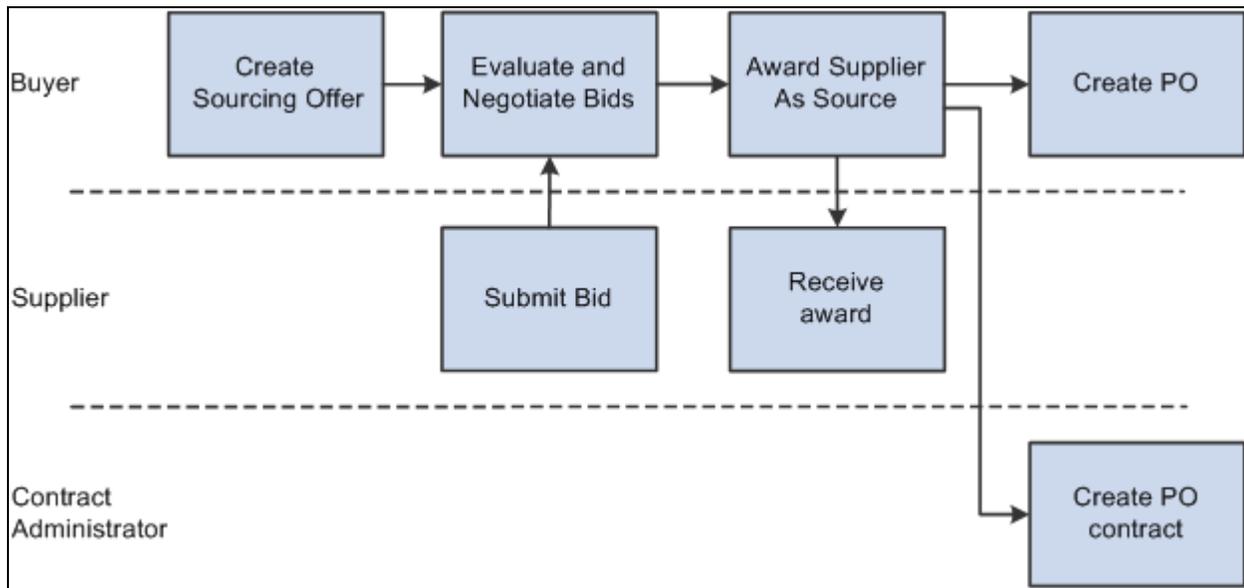
Sourcing Offer process for procuring items or services

To create a sourcing offer:

1. Plan and create a buy or sell event.

2. Define bid factors, item or service specifications, and due dates.

3. (Optional) Invite collaborators to provide event input.

4. Invite bidders to bid on the event, and post the event for bidding.

When you create an event, you provide bidders an overall description of the event at the header level, with item-specific details at the line level. You can copy a previous event, purchase order, requisition, contract, PeopleSoft Engineering bill of material (BOM), PeopleSoft Manufacturing BOM, PeopleSoft Supply Planning planned order, or RFI to create a new event, and save events to use as templates. You can also attach documents and image files to the event to provide bidders with precise information about what you are buying or selling.

Specify at the header level any bid factors that pertain to the entire event. Then, at the line level, specify bid factors that apply to specific items. For each bid factor, set a weighting, letting the bidder know how much value you give to that portion of the bid. Price is, by default, the first bid factor of any line, and you also set a weighting for it. You can enter bid factors that you answer without displaying them to the bidders. These bid factors can be for subjective responses, such as current business relationship or interview results.

You can specify a list of bidders to invite to the event. You can modify this list by inviting some of them to bid only on specified line items. You can also specify an event as public to enable any organization or individual to register and place a bid.

When you create an event, the system generates a PDF file describing the event. In addition, you can create an XML file that contains event details that bidders can use to enter their bids and upload their responses using Microsoft Excel 2002. This PDF file, and optionally the XML file, is attached to the email that notifies bidders of the event. If you modify the event, you can regenerate the PDF and XML files and dispatch them to bidders.

Event creation options include a restriction that specific business units accept bids in multiple currencies. Or you might set extensions to the end time of some auction events but not others.

Event Status

When you create an event, its status is *Open.* Once you post the event for internal approval, its status becomes *Pending Post Approval.* Other valid event statuses are:

- *Collaborating Event:* The event has been routed for internal collaboration.

- *Posted:* The event is approved, and bidding is ongoing.

- *Event Completed:* The event has ended, but the update event status process has not been run.

- *Pending Award:* The event has been completed but not yet awarded.

- *Collaborating Bid Analysis:* The event has been routed for bid analysis collaboration.

- *Awarded:* The event award has been approved; the event itself is complete.

- *Not Awarded:* The event ended without the event being awarded.

- *Canceled:* The event creator canceled the event.

For RFI events, the following event statuses include:

- *Open:* The event is newly created and not yet approved.

- *Collaborating Event:* The event has been routed for internal collaboration.

- *Pending Post Approval:* The event is posted for internal approval.

- *Posted:* The event is approved, and bidding is ongoing.

- *Posted/Event Ended:* The event is approved and has ended but is not yet reviewed.

- *Pending RFI Review:* The event has ended and is awaiting review.

- *Collaborating Bid Analysis:* The event has been routed for bid analysis collaboration.

- *RFI Reviewed:* RFI responses have been reviewed.

- *Canceled:* The event creator canceled the event.

- *Post To Third Party Failed:* When an event is in this status, it reverts back to *Open* after the event creator loads or edits it.

Event Modification

After you post an event, you can make only the following modifications:

- Add comments and attachments, including regenerating the PDF file that describes the event.

- Revise event extension parameters.

- Extend the end date.

- Invite new bidders.

- Change the reserve price.

When you make these modifications, you can re-notify bidders and optionally regenerate the PDF and XML files.

Automatic Proxy Bidding

Event creators can allow bidders to submit proxy bids to price-based auction events. This feature enables bidders to submit the lowest price bid for the requested goods or services. Then the system makes bids automatically—as needed to take the lead—to the preset best (proxy) offer. Thus, the bidder gets the best possible deal while still winning the business.

For example, the event creator may enable proxy bidding on a buy auction event. The event has one line with a start price of 100 USD and a bid decrement of 5 USD. If proxy bidding is enabled, bidders can enter the absolute lowest price that they are willing to offer and allow the system to bid on their behalf. So assume that Bidder A has the current winning price of 90 USD. Bidder B could enter a proxy bid price of 70 USD. Upon posting the bid, Bidder B's current bid price would actually be set to 85 USD (the current winning price minus the bid decrement). If Bidder C then bid 78 USD, then Bidder B's current winning bid price would be updated to be 73 USD, which is Bidder C's bid price minus the 5 USD decrement. Therefore, Bidder B would still have the winning bid.

See Also

Chapter 14, "Placing and Managing Bids," Entering Bids Using Automatic Proxy Bidding, page 272

Alternate Unit of Measure Conversion

Event creators can indicate whether alternate units of measure are allowed on a buy event. The event creator can specify whether bidders can bid using any alternate unit of measure or only existing item and unit of measure relationships. If allowed, bidders can select a different unit of measure when bidding on a line. All line price and quantity details are converted to the bidder's selected unit of measure based on the specified conversion rate. During analysis, the bid prices are reflected based on the line item's unit of measure.

For example, the event creator may need to purchase 10,000 pens with a start (worst) price of $1.00 each. The event creator uses a unit of measure of each, but allows bidders to bid in any alternate unit of measure. The first bidder may select to bid in boxes, and therefore can specify that each box contains 50 pens. Therefore, this bidder would bid 200 boxes to equal 10,000 pens. The start (worst) price is updated based on the conversion rate of 50 pens to 1 box; therefore, the maximum price that the bidder can bid is $50 per box (50 pens per box $\times$ $1 per pen). The second bidder could select to bid in cases, and can specify that each case contains 500 pens. Therefore, this bidder bids 20 cases to equal 10,000 pens. The start (worst) price when bidding in cases is $500 (500 pens per case $\times$ $1 per pen). When the analyzer reviews all of the bids, the bid prices appear based on the line unit of measure of each.

The option to allow alternate units of measure is specified at the line level. Users can use the Line Defaults page to set the option for all lines on an event. If the event creator selected to allow only alternate units of measure based on existing item and unit of measure relationships, the conversion rate is automatically supplied for the bidder, based on the conversion rate specified on the item and unit of measure relationship. If any unit of measure is allowed, bidders must provide the unit of measure conversion rate for the specific line item.

Note. You can use this functionality on RFx buy events only.

Award Beyond Event Quantity or Amount

Event creators can allow bidders to bid in excess of the original line quantity or amount requested. This is indicated at the line level on a sourcing event. If allowed, bidders can submit bids in excess of the requested quantity. Bidders can also enter price breaks in excess of the requested quantity. Users can award a bidder more than the original line quantity, up to the bidder's maximum bid quantity, if the user has proper permissions on the Sourcing User Preferences page.

Amount Only Requisitions

Event creators can create new buy events by copying from amount-only requisitions. If multiple amount-only requisitions are used during event creation, the lines will not be consolidated into a single line on the sourcing event. In addition, you cannot award amount-only lines to more than one bidder. You can award bids to purchase orders or contracts.

Price Adjustments

You can specify whether price adjustments for higher volumes are allowed on an event. The event creator defines price tiers or allows bidders to provide their own price tiers. If you specify the price tiers, you can create as many tiers as you need.

For example, a bidder can specify that for a quantity between 1 and 100, the price is 5 USD per unit, and between 101 and 500, the price is 4 USD per unit.

Price adjustments are for buy events only.

Requisition Consolidations

You can consolidate requisitions across multiple Purchasing business units for the same item. All schedule and distribution information is maintained for the requisitions. The selected requisitions are prevented from being sourced to a purchase order while the event is taking place. If an event is canceled, the requisitions are available for sourcing.

Line Groups

During event creation, users can select lines that they want to group to attempt to get better pricing through a bundled price quote. Users use the Line Details page to add line items to a group. Users can add the same line to multiple groups. When a line is added to a group, the line's bid factors are copied into the group bid factors but remain associated with their respective items. The line weightings and bid factor weightings will be prorated within the group. Users can modify the bid factor questions and the best, worst, or ideal values for the bid factors within the group.

When a user creates the group, the user defines the group details, including group bid parameters, on the Line Details page. Users can define price breaks at the group level for RFx events. Users also can indicate that a line can be bid on only as part of the group. If selected, the line is not available for bidding outside of a group. Users can specify at the event-level whether bidder-initiated groups are even allowed. The user can filter on all lines and groups, only lines, or only groups.

Discussion Forums

You can use discussion forums to communicate with buyers or sellers. PeopleSoft Strategic Sourcing includes two delivered forums:

- An event-specific forum enables suppliers to ask questions regarding the event and have them answered by the buyer.

- A general question forum displays inquiries regarding the application's operation and the bidding process.

System administrators can also create new forums. Replies can be marked as public or private. If private is selected, only the replier and the author of the post being replied to can view the message. If the message is marked public, all users can view the message. Forums can also be marked read-only so that some users can view the messages, but not post replies or post new messages. All delivered and newly created forums reside in the Forums component.

When an event or RFI is created, you can start a high-level message thread for that event. When that event is posted, the system includes a text message about the discussion forums in the notification email sent to invited bidders. For each event that has a message thread, the system provides a link to the message thread on the Search Events and Event Workbench pages. Security for the forum is role-based and enforced at the event ID level. In addition, the event creator can exclude named users from seeing a particular forum. A bidder can see either all of the public discussion surrounding an event or nothing.

Bidders can ask questions of event creators regarding use of the application and the bidding process using the general question forum. This forum is not tied to an event and can be accessed from the general forum on the supplier-facing Search Events page, the Event Workbench, Analyze Events, and Bid Response pages, and the Home Page pagelet. Security for the forum is role-based, in addition to the named supplier exclusion feature.

The Forum Administration component enables the event creator to manage the forums, including deleting messages, creating new custom forums, modifying existing forums, and setting security for all the forums.

See Also

Bidder Downloads

You can designate that bidders can download events, manage them in a spreadsheet format, and then upload their bids.

When an event is posted, the system creates an XML bid package with event information that can be stored as a header attachment. The XML file is also included in the event invitation email that is sent to the invited bidders. Bidders can download event details into a Microsoft Excel 2002 spreadsheet format, enabling the bidder to review event details and enter responses. This eliminates bidder concerns that buyers are reviewing bids to gain negotiation strategies before final submission. This approach makes it easier to gather input from third parties who do not have primary responsibilities for completing a bid but whose input is necessary to establish a response.

Bidders can then save the spreadsheet as an XML file and upload responses into PeopleSoft Strategic Sourcing.

Note. Bidders must use Microsoft Excel 2002 to save spreadsheet responses as an XML file and upload them into PeopleSoft Strategic Sourcing.

Bidder Removal

If a bidder is not adhering to the rules of the event, the event creator can remove the bidder from the event. The system automatically cancels any bids entered by the bidder, and all other bids are rescored to exclude the canceled bids.

Defining Basic Event Information

This section provides an overview of event types and formats and discusses how to:

*   Create a sourcing event.

*   Define header details.

*   Copy events from other transactions.

*   Specify event settings and options.

*   Define payment terms and contact information.

*   Create lot events.

*   Associate sourcing plans with events.

Understanding Event Types and Formats

This section discusses PeopleSoft Strategic Sourcing event types and formats.

RFIs

You can quickly create an RFI before you issue a request for proposal (RFP) or request for quote (RFQ). You use RFIs to gather information before issuing an RFP or RFQ event. The RFI includes header bid factors and no line items. No preview dates exist for RFI events. Bidders can respond to the RFI, and the RFI creator can review the RFI responses. RFIs aren't awarded, but instead are marked as *Reviewed*. You can, however, score an RFI. You can copy an RFI into a future RFP or RFQ, and the related RFI responses are accessible from the Analyze Bids component for bidders who respond to both the RFI and RFP or RFQ.

RFI functionality enables event creators and bidders to:

• Copy from existing RFIs and RFI templates.

• Select options for the RFI, such as whether bidders can edit posted responses, whether responses are required for all bid factors, and whether bid factor weightings should appear to bidders.

• Create a PDF version and optionally an XML version of the posted RFI response and send an email with the PDF to the bidder.

• Enable bidders to view and respond to RFIs either online or by uploading the XML file.

• Analyze RFI responses, optionally assign scores manually to text-based responses, and perform what-if analysis.

• Enable creation of buy events by copying an RFI, and maintain a reference of the RFI on the related buy event.

• View the related RFI bidder response when analyzing buy events.

See Chapter 9, "Creating Events," Adding and Maintaining Sourcing Event Templates, page 187.

Event Templates

You can save events as templates to reuse in future events, and associate an event template with business units, departments, or a specified user, based on the user's security. You can also create templates by selecting Sourcing, Create Events, Maintain Event Templates. In addition, users with the appropriate security can modify templates. PeopleSoft Strategic Sourcing users can copy templates to expedite the event creation process.

You can save a template as a business unit, department, or personal template. If a template is marked as a business unit template, it is available to all users who have access to that business unit. If a template is marked as a department template, you can associate one or more departments with the template. Only users assigned to the associated departments can copy from department templates. If a template is marked as a personal template, only the user who created the template can access it.

Event Lotting

You can create multiple auction events and link them together as lots within an overall auction process. Each lot is treated as a unique event, but is tied to other events. As the bidding on one event lot ends, the bidding on another event lot immediately begins. This continues until all of the linked event lots have finished. You link auction events to other events from the Create Event pages by selecting a preceding event to link to the current event. The start date and time of one event lot depends on the end date and time of the previous lot; therefore, any change to the end date and time of one event lot can change the end date and time of any subsequent event lots. The system recreates the PDF and XML documents for each affected event to ensure that the documents reflect the most current preview, start, and end dates and times.

Bidders can navigate between event lots to view and enter bids. During analysis, you can navigate between event lots to analyze all linked events.

PDF Creation

You can create PDF versions of sourcing events. You can generate PDFs at different stages of the sourcing event process:

• Creating an event.

  You can select to preview the PDF file during creation of the event to review it before posting the event.

• Posting an event.

  The PDF file is automatically generated when an event is posted.

• Modifying an event.

  You can recreate the PDF file after making modifications to the event.

• Posting a new version or round of an event.

  The PDF file is automatically generated when a new version or round is posted.

• Updating event lots.

  If the start and end dates are automatically updated on an event lot due to an extension to a linked auction lot, the PDF is automatically recreated and sent to the invited bidders.

If you are using PeopleSoft Supplier Contract Management and have associated contract clauses with bid factors in the event, the contract clauses will be included in the PDF file. Clauses at the header level (event) are contained in an appendix section. However, line-level clauses are included in the Line Details section.

Pages Used to Define Basic Event Information

Page Name	Definition Name	Navigation	Usage
Event Summary	AUC_CREATE_PG	Sourcing, Create Events, Event Details	Enter header information for auction events.
Enter Copy Criteria	AUC_COPY_SEC	Click the Copy From link on the Event Summary page.	Use a previous event, requisition, purchase order, contract, PeopleSoft Engineering BOM, PeopleSoft Manufacturing BOM, PeopleSoft Supply Planning planned order, template, or RFI as the template for a new event.

Page Name	Definition Name	Navigation	Usage
Contract Lines to Copy	AUC_COPY_CNTRCT	Click the Copy From link on the Event Summary page. Select *Contract.*	Select contract lines to copy to an event.
Enter Copy Criteria	AUC_COPY_SEC	• Click the Copy From link on the Event Summary page. Select *Delimited File.* • Click the Line Items link on the Event Summary page, and select *Delimited File* from the Copy From drop-down list box.	Select the delimited file that you want to import. This file should currently reside on your FTP server.
Lines to Import	AUC_COPY_FILE	Click the Line Items link on the Event Summary page, and select *Delimited File* from the Copy From drop-down list box. Select the delimited file that you want to copy, and click the OK button.	Select the line information that will be imported from the delimited file.
Import File Errors Import File Errors and Warnings page	AUC_COPY_FILE_MSG	Select the delimited file that you want to copy on the Enter Copy Criteria page, and then click the OK button. Select the lines that you want to copy on the Lines to Import page, and then click the OK button.	Review errors and warning messages encountered during the import process.
Bill of Material Lines to Copy	AUC_BOM_SUMMARY2	Click the Copy From link on the Event Summary page. Select *Manufacturing* or *Engineering Bill of Material.*	Select PeopleSoft Manufacturing or PeopleSoft Engineering BOM components to copy to an event.
Event Lines to Copy	AUC_COPY_PLN	Click the Copy From link on the Event Summary page. Select *Planning Order.*	Select planned order lines to copy to an event.
Purchase Order Lines to Copy	AUC_COPY_PO	Click the Copy From link on the Event Summary page. Select *Purchase Order.*	Select purchase order lines to copy to an event.

Page Name	Definition Name	Navigation	Usage
RFI Lines to Copy (request for information lines to copy)	AUC_COPY_RFI	Click the Copy From link on the Event Summary page. Select *Request For Information.*	Select RFI lines to copy to an event.
Requisition Lines to Copy	AUC_COPY_REQ	Select the Copy From option on the Event Summary page. Select *Requisition.*	Select requisition lines to copy to an event.
Sourcing Event Lines to Copy	AUC_COPY_AUC	Select the Copy From option on the Event Summary page. Select *Sourcing Event.*	Select event lines to copy to a new event.
Sourcing Template Lines to Copy	AUC_COPY_SEC	Select the Copy From option on the Event Summary page. Select *Sourcing Template.*	Select sourcing template lines to copy to an event.
Event Settings and Options	AUC_OPTIONS_PG	Click the Event Settings and Options link on the Event Summary page.	Specify the rules related to an event, as well as what information can appear to bidders. For auction events, specify event extension criteria.
Event Contact Details	AUC_CONTACT_PG	Click the Payment Terms and Contact Info link on the Event Summary page.	Specify payment and currency information, as well as information about the event contact.
Sourcing Exchange Rate Inquiry	EXCH_RT_DTL_INQ	Click the Exchange Rate link on the Event Contact Details page.	View the rate of exchange against the event's currency.
Sourcing Document Status Inquiry	AUC_DOC_STATUS	Click the Document Status Inquiry link on the Event Summary page.	View document status associated with sourcing events.
Event Lots	AUC_EVENT_LOT_SEC	Click the Event Lots link on the Event Summary page.	Link an event to a preceding event. This page is available only for auction events.
Associate Plan Tasks	AUC_PLN_RQEV_WRK	Click the Plan Tasks Associations link on the Event Summary page.	Associate a sourcing event with sourcing project plan tasks.

Creating a Sourcing Event

Access the Create Events search page (Sourcing, Create Events, Event Details).

Create Events search page

Event Round and **Event Version**	When creating a new sourcing event, these fields are display-only and have a value of *1*.
Event Format	Select *Buy, RFI,* or *Sell.*
Event Type	Select *Auction* or *RFx.* If you are creating an auction event and want to enable bidders to use the automatic proxy bidding feature, you must select *Auction.*
Proxy Bidding (Auctions Only)	Select *Enabled* or *Disabled* to indicate whether to enable bidders to submit proxy bids automatically. This field is available for auction events only. You can update this setting on the Event Settings and Options page.

Defining Header Details

Access the Event Summary page (Sourcing, Create Events, Event Details).

Event Summary page (1 of 2)

Event Summary page (2 of 2)

Add header details such as event name, description, preview, and start and end dates for the sourcing event.

Copying Events from Other Transactions

Access the Enter Copy Criteria page (select the Copy From option on the Event Summary page).

You use the Strategic Sourcing User Preferences page to specify the transactions from which users can copy.

You can use several documents to create one event. The system consolidates identical line items. For example, if you copy from three different requisitions that all contain an identical line item, that line item appears only once on the new event.

Note. If you selected External PO Integration on the Business Unit Definition page and are awarding events to an external purchasing system, you can copy only from sourcing events, sourcing templates, and RFIs.

See Chapter 2, "Setting Up Business Units in PeopleSoft Strategic Sourcing," page 15.

Required Fields for Delimited File Import

The following table lists and describes the required fields for importing delimited files into PeopleSoft Strategic Sourcing using the Copy From feature.

Warning! These fields *must appear in this order* in the delimited file.

Field Name	Description	Maximum Data Length (Type)
INV_ITEM_ID	The item ID associated with the line item. If it is a buy event, then this is the inventory item ID. If it is a sell event, this is the asset ID. **Note.** This field is not required if you are defining an item by description.	18 characters
DESCR254_MIXED	The description of the line item. If you are using an item ID, the description will be the default value for the line based on the item ID.	245 characters
CATEGORY_CD	The category code associated with the item. If it is a buy event, this is the item category. If it is a sell event, this is the asset category. If you are using an item ID, the category will be the default value for the line based on the item ID.	18 characters
UNIT_OF_MEASURE	The unit of measure (UOM) code associated with the line. If you are using an item ID, the UOM will be the default value for the line based on the default UOM associated with the item.	3 characters
QTY_AUC	The requested line quantity for the line.	11.4 numeric

Field Name	Description	Maximum Data Length (Type)
AUC_PRICE	The starting price for the line item. If you are using an item ID, the start price should be entered on the line by default based on the standard price associated with the item.	11.5 numeric
WEIGHTING	The line weighting associated with the line. If this field is left blank, all lines should be weighted equally when imported into the event.	3.5 signed
COMMENTS_2000	Comments associated with the line.	Long field
DUE_DATE	The due date for the item.	10 date
SHIPTO_ID	The ship to location code for the item.	10 characters
FREIGHT_TERMS	The freight terms code for the item.	10 characters
SHIP_TYPE_ID	The ship via code for the item.	10 characters
SHIP_FROM_LOC	The ship from location code for the item.	10 characters

This table contains optional fields that can be included in the delimited file.

Field Name	Description	Maximum Data Length (Type)
MFG_ID	The ID of the manufacturer of the item.	50 characters
MFG_ITM_ID	The manufacturer's ID for the item.	50 characters
AUC_ITEM_LENGTH	The length of the item.	11.4 signed
AUC_ITEM_WIDTH	The width of the item.	11.4 signed
AUC_ITEM_WEIGHT	The weight of the item.	11.4 signed
AUC_ITEM_VOLUME	The volume of the item.	11.4 signed
AUC_ITEM_HEIGHT	The height of the item.	11.4 signed
AUC_ITEM_SIZE	The size of the item.	5 characters
AUC_ITEM_COLOR	The color of the item.	15 characters
AUC_WEIGHT_UOM	The unit of measure code associated with the weight.	3 characters

Field Name	Description	Maximum Data Length (Type)
AUC_VOLUME_UOM	The unit of measure code associated with the volume.	3 characters
AUC_DIMENSION_UOM	The unit of measure code associated with the width.	3 characters

Copy Template

Copy From   Select the source from which to copy. Values are:

- *Contract:* You can copy contract line items onto buy events.

- *Delimited File:* You can import item information that is saved as a delimited file.

    This enables you to avoid having to manually enter line information.

- *Engineering BOM* (engineering bill of material): You can copy items from a PeopleSoft Engineering BOM onto any buy event by entering an item ID.

- *Manufacturing BOM* (manufacturing bill of material): You can copy items from production and rework BOMs onto any buy event.

- *Planning Order:* You can copy items from planned orders onto buy events by selecting a business unit and planner code.

- *Purchase Order:* You can copy purchase order line items onto buy events.

- *Purchase Requisition:* You can copy requisition line items onto buy events. If you copy a requisition into an event, the requisition is not available for sourcing until the event is awarded.

- *Request for Information:* You can copy lines from an RFI onto any event.

- *Requisition:* You can copy lines from amount-only requisitions onto buy events.

    You can copy multiple lines from multiple amount-only requisitions. The system creates a separate line on the sourcing event for each line copied from the amount-only requisition.

- *Sourcing Event:* You can copy line items and associated details from previous events onto any event.

- *Sourcing Template:* You can use an event template to copy the entire event details onto any event.

See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining User Preferences," Defining Strategic Sourcing User Preferences.

Select Criteria

Copy Method	Select the way the system copies the information. Values are:

- *Override:* The system replaces any existing information for the event with the data from the template.

- *Append:* The system adds information to existing event information but does not write over any fields that contain data.

Other fields that appear in the Select Criteria group box depend on the selection in the Copy From field.

Copy Criteria

Enter identifying information into a field to search for a template. Narrow the search response by entering criteria in more than one field.

Copying from a Delimited File

Access the Enter Copy Criteria page (select the Copy From option on the Event Summary page).

Enter Copy Criteria page (copying delimited files)

Copy From	If you selected Delimited File on the Event Summary page, then the default value is *Delimited File.*
Copy Method	Select *Append* or *Override.*

Select File   Click this button to select the delimited file that you want to copy into the sourcing event. Click the Browse button to locate the file, and then click the Upload button. The file is uploaded, and you will then be returned to the Enter Copy Criteria page.

Selected File   The system displays the name of the file you uploaded.

File Includes Header Row   Select this option if the delimited file contains a header row. If this option is selected, the system ignores the first row of the file. Do not select this option if you want the system to import the file beginning with row 1.

Consolidate Identical Items   Select this option if you want the system to consolidate identical items into one event line.

Delimiter Type   The system displays the type of delimiter that was used for the uploaded file. Values are:

- *Tab*

- *Comma*

- *Semi-colon*

- *Other:* If you select this option, the Specify Delimiter field appears, and you must enter a character in this field.

Specify Delimiter   Enter the delimited character used in the import file. This is a required field used with the *Other* value in the Delimiter Type field. The length of this field is two characters

Display Import Error Messages   Select this check box if you want the system to display a list of all error messages encountered during the import process.

Error Handling Options   Select how you want to handle any errors received during the import process. Values are:

- *Cancel Import:* The system cancels the import and no lines are imported if an error is encountered during the import process.

- *Exclude Errors:* The system copies all valid lines, but excludes any lines that contained errors.

- *Ignore Errors:* The system copies all line information and ignores errors.

  You will need to correct the errors on the Line Details page.

Category   The system populates the line or item with the default value. This value comes from the AUC_LINE record.

UOM (unit of measure)   The default UOM associated with the line or item.

Quantity   The default quantity associated with the line or item.

OK	Click to access the Lines to Import page.

Selecting Lines to Import from the Delimited File

Access the Lines to Import page (click the Line Items link on the Event Summary page, and select *Delimited File* from the Copy From drop-down list box).

All fields on the tabs are display-only except for the Sel (select) column. You can view item details, shipping details, specifications, and comments associated with the line items.

Sel (select)	Select the check box for the lines that you want to copy.
OK	Click to copy the selected lines from the delimited file.

Viewing Import File Errors

Access the Import File Errors page (select the delimited file that you want to copy on the Enter Copy Criteria page, and then click the OK button).

This page displays errors and warnings encountered during the import process.

Specifying Event Settings and Options

Access the Event Settings and Options page (click the Event Settings and Options link on the Event Summary page).

Event Settings and Options page (RFx)

Event Settings and Options page (Auction)

Some fields are common to RFx and auction sourcing events. Any differences between the two event types are noted.

Common Fields

Create PDF on Event Post   Select to create a PDF version of the sourcing event. If this option is not selected, PDF creation is suppressed. The value will default from the Business Unit Definition page (Set Up Financials/Supply Chain, Business United Related, Sourcing, Business Unit Definition), but you can override this option for the event.

Allow Bidder XML Downloads   Select to enable bidders to download events to an XML file. If this option is not selected, a PDF version of the sourcing event is created; however, an XML version is not created when the events are posted.

Post Events to Third Party   Select to allow this event to be posted to third-party bid management systems. This field is available only if posting to third-party systems is allowed by the business unit.

Send PDF and XML Files   Select to enable the system to send the PDF and XML files that are generated on event post to third-party systems. This field is available only if posting to third-party systems is allowed by the business unit.

Bid Required On All Lines   Select this check box if you require bidders to bid on all lines on the event. The default value comes from the Sourcing Business Unit Definition page (Set Up Financials/Supply Chain, Business Unit Related, Sourcing, Business Unit Definition), but you can change it here.

Round/Version Display   Select one of these options:

- *Display Round*

- *Display Round and Version*

- *Do not Display*

The default value comes from the Sourcing Business Unit Definition page, but you can change it here.

Factor Event Score Into   Select to indicate that you want the system to factor the header score into the total score for the event or the individual line score. If you plan to award an entire event to one bidder, you would likely want to factor the header score into the total score. If you intend to award lines to different bidders, Oracle recommends that you factor the header score into the individual line score. The default value comes from the Sourcing Business Unit Definition page, but you can change it here.

Note. If you are using the Optimization Engine to determine the ideal award allocation for events, you should factor the header score into the individual line score. Optimization uses each line's price and score, not the total price or score, to determine an ideal award allocation.

Header Weighting	Enter a default weighting for how the system weights the header score in relation to the total score. The default value comes from the Sourcing Business Unit Definition page, but you can change it here.
	For example, assume that you set the default event header weighting to 20 percent, and then you create an event with three lines. Line 1 is weighted 50 percent, line 2 is weighted 20 percent, and line 3 is weighted 10 percent. The total weighting of the lines is 80 percent plus the defaulted weighting of the header (20 percent), totalling 100 percent if you selected to factor the header score into the total score.
	If you selected to factor the header score into the individual line score and your default event header weighting was 20 percent, then the weighting for the other bid factors for each line must total 80 percent. For example, you could have price weighted at 50 percent, warranty weighted at 30 percent, and the header score weighted at 20 percent for a total weighting of 100 percent for the line item.
	Note. If you select to factor the header score into the individual line score, a *header* bid factor is automatically added to each line within the event. This bid factor is not displayed to bidders but is used to calculate the score of the line based on the event header score plus the score for the line bid factors.
Start Price	Select a value to indicate the basis for pricing:
	• *Display and Also Must Beat*
	• *Display but Must Not Beat*
	• *Do Not Display*
Do Not Use Best Bids on New Rounds	This setting defaults from the Sourcing Business Unit Definition page based on the business unit. However, you can change the setting at the event level here.
	Select to indicate that new rounds should not be created using best bids when the bids are countered. If you select this option, then bidders will not be able to accept the counter offer on the Create Bid Response page; bidders will be forced to rebid. In this scenario, bidders will still be able to either counter or withdraw the bid.
Display Bid Factor Best/Worst and **Display Bid Factor Ideal Value**	These settings default from the Sourcing Business Unit Definition page based on the business unit. However, you can change the settings at the event level here.
	Select to show the best and worst values for the bid factor or the ideal value for the bid factor on the Create Bid Response page. If you deselect these options, then bidders will not be able to see the best and worst values or the ideal value for a bid factor on the Create Bid Response page.

RFx Only Fields

Multiple Bids Allowed	Indicates whether bidders (for RFx events) can post multiple bids on the same event. The default value comes from the Sourcing Business Unit Definition page, but you can change it here.
Allow Edit of Posted Bids	Indicates whether bidders (for RFx events) can edit their posted bids until the event ends. The default value comes from the Sourcing Business Unit Definition page, but you can change it here.
Sealed Event	If this option is selected, the system hides all bid response information from the event creator until the event ends. Users cannot see any bid information while the event is still open for bidding. The default value comes from the Sourcing Business Unit Definition page, but you can change it here.
Display Bid Factor Weightings	Select to display to bidders the weightings associated with bid factors. The default value comes from the Sourcing Business Unit Definition page, but you can change it here.

Auction Only Fields

For auction events, you can specify an event end date to be extended automatically if a bid is posted within the specified time period before the event end date. You can specify how many extensions can take place and the length of time that the event should be extended. If an auction event is extended and has subsequent event lots, the preview, start, and end dates for the subsequent lots are also updated.

Proxy Bidding	If automatic proxy bidding is enabled, this field appears. Select *Enabled* or *Disabled* to indicate whether proxy bids are to be allowed on this auction event. The default value comes from the Sourcing Business Unit Definition page, but you can change it here.
	In addition, you can override the proxy bidding setting from the Create Events (add) page.
	See Chapter 9, "Creating Events," Creating a Sourcing Event, page 133.
Bidders Compete at	Select either *Event Level* or *Line Level*.
	If *Event Level* is selected, bidders compete based on the total price or total score for the entire event. In some cases, a bidder may have a worse price or score on one or more lines but still be the winning bidder as long as the bidder's total price or score beats the other bids.
	If *Line Level* is selected, bidders compete based on each line's price or score. The default value comes from the Sourcing Business Unit Definition page, but you can change it here.
	Note. If automatic proxy bidding is enabled, bidders must compete at the *line* level; therefore, this field is unavailable for selection.

Competitor Bids   Select a value to indicate whether to display the bids of competitors. Values are:

- *Display and Show Identity:* The system displays the bid prices, scores, or ranks to all of the bidders, and also displays the identities of the bidders.

- *Display but Hide Identity:* The system displays the bid prices, scores, or ranks to all of the bidders, but does not display the identities of the bidders.

- *Do Not Display:* The system does not display any bid information.

Rank Options   Select a value:

- *Display Rank Only:* The system displays the overall rank to each bidder but does not display the total number of bids.

- *Display Rank/Total # of Bi:* The system displays the overall rank to each bidder in relation to the total number of bids received.

- *Do Not Rank:* The system does not display the rank of the bids.

The default value comes from the Sourcing Business Unit Definition page, but you can change it here.

Note. If automatic proxy bidding is enabled, the only option is *Do Not Rank,* and the system selects it as the default value.

On the Basis of   Select a value to indicate the basis on which the auction event is based. Values are *Price* and *Score.* If *Price* is selected, the bidders will compete solely on price, either total or per line, and no other bid factors can be added to the event. If *Score* is selected, the bidders will compete based on score, either total or per line, and the user can add as many bid factors to the event. The default value comes from the Sourcing Business Unit Definition page, but you can change it here.

Note. If automatic proxy bidding is enabled, the system selects the value of *Price* because automatic proxy bids are based on price only.

Bidders Must Beat   Select *Own Bid* or *Winning Bid.* If *Own Bid* is selected, a bidder must beat his last posted bid on the event. If *Winning Bid* is selected, a bidder must beat the current winning bid. The default value comes from the Sourcing Business Unit Definition page, but you can change it here.

Note. If automatic proxy bidding is enabled, the value of *Winning Bid* is selected.

Display Winning Bid to Bidders	Select if you want the winning bid to appear to all bidders. This option must be selected if you require bidders to beat the winning bid. The default value comes from the Sourcing Business Unit Definition page, but you can change it here.
	Note. If automatic proxy bidding is enabled, this field is not available.
Allow Extension	Select to activate the extension function for the event that you are creating.
Last Bid Received and **Type**	Enter a time period, relative to the end time of the event, during which bidding is extended for the event.
	For example, if the Last Bid Received field has the value *1* and the type is *Hours,* then the event is extended when a bid is received within one hour before the scheduled end time.
	Note. The extension begins at the scheduled end time, not at the time of the last bid.
Number of Extensions	Enter the number of times that the event can be extended. An extension occurs if the Last Bid Received and Type field criteria are met for as many extensions as you allow.
	The event ends either when no bid is received before the time for the last bid expires or the number of extensions is reached (regardless of when the last bid is entered).
Length of Extension and **Type**	Enter the amount of time to enable bidding to continue after each extension starts.
	For example, if the length of extension is *4,* and the type is *Hours,* then the event extended four hours after the scheduled end time.
	Note. The extension begins at the scheduled end time, not at the time of the last bid.

Defining Payment Terms and Contact Information

Access the Event Contact Details page (click the Payment Terms and Contact Info link on the Event Summary page).

Event Contact Details page

Payment & Currency Information

Currency	Select the currency to be used for payment. This is a required field.
Exchange Rate	Click to access the Sourcing Exchange Rate Inquiry page to view conversion rate information.
Pay Method	Select a method for payment that will be accepted. Values are *Cash, Check, Credit Card, DD* (direct deposit), *Draft, EFT* (electronic funds transfer), and *Giro-EFT*.
Payment Terms	Select a value to indicate the payment terms for the event.
Bill Addrs (billing address)	Select the address to which all invoices should be sent.
Buyer	(Optional) Select a value to be assigned to this event.
Rate Type	Select a rate type for the event. This field is required. The default value comes from the Sourcing Business Unit Definition page (Set Up Financials/Supply Chain, Business Unit Related, Sourcing, Business Unit Definition), but you can change it here.
Rate Date	Enter an effective date for the rate type. This is a required field.

Allow Bids in Other Currencies	Select to permit bidders to enter bids in currencies other than the event currency.
Tax Exempt	Select if your company is tax exempt.
Exempt ID	Enter your company's tax exemption identification number. This field works with the Tax Exempt field.

Event Contact

Enter information such as name, email address, and phone number for the individual to be contacted in connection with this event.

Creating Lotting Events

Access the Event Lots page (click the Event Lots link on the Event Summary page).

Event Lots page

Note. This page is available only for auction events.

To create lotting events, select a preceding lot ID to associate this event with one scheduled to occur before it. The second event does not begin until the first event has ended.

When you change an event end date for which subsequent event lots exist, the system:

- Updates all subsequent event lot dates based on the original increments set for the preview and end dates.

- Regenerates the PDF and XML documents for all affected events.

- Generates an email notification to the invited bidders notifying them of the changes in the event dates and times.

Associating Sourcing Plans with Events

Access the Associate Plan Tasks page (click the Plan Tasks Associations link on the Event Summary page).

Associate Plan Tasks page

Search Criteria

Business Unit	Select the business unit for the sourcing plan.
Plan ID	Select the sourcing plan.
Task Number	Select a specific task number associated with the sourcing plan. If you want to view all tasks associated with the sourcing plan, leave this field blank.
Completion Method	Select a value to indicate the method that could cause the status of the event to be updated:

- *Event Approved*
- *Event Awarded*
- *Event Ends*
- *Event Posted*
- *Event Starts*

Search	Click the search button to retrieve the sourcing plan.
Select All	Select to indicate that you want to add all tasks associated with the sourcing plan.
Clear All	Select to deselect all selected tasks.

Available Tasks

                        Select the check box for each task that you want to use.

Adding Line Items and Line Defaults to an Event

This section discusses how to:

- Enter line-level item information.

- Add line details.

- Enter event line defaults.

Pages Used to Add Line Items and Line Defaults to an Event

Page Name	*Definition Name*	*Navigation*	*Usage*
Line Details	AUC_LINES_PG	Sourcing, Create Events, Event Details, Event Summary, Line Items Click the Details button on the Line Items: Basic Information page.	Enter shipping information, bid parameters, item specifications, and line images.
Event Line Defaults	AUC_CREATE_DFLTS	Click the Item Line Defaults link on the Event Summary page.	Enter or edit default due-date shipping information, as well as alternate units of measure rules.

Entering Line-Level Item Information

Access the Line Items page (Sourcing, Create Events, Event Details, Event Summary, Line Items).

Line Items page - Basic Definition tab

Line Items page - Advanced Definition tab

Add Selected Lines to Group   Select a value to add lines to or remove lines from a group:

- *Add to New Group:* Select to add the selected items to a new group.

    You can create as many groups as needed. Once you define the group for the event, you can add or remove new items to this group.

- *Remove from Groups:* Select to remove selected items from the group.

Group ID   This field appears if you select *Add to New Group* in the Add Selected Lines to Group drop-down list box. Select a unique group ID for this group. Bidders will use this value to bid on the group.

OK   Click to initiate the action chosen in the Add Selected Lines to Group drop-down list box.

Basic Definition Tab

Item ID   Select from the item master (for buy events) or asset records (for sell events).

Description	Displays by default the description of the item ID. If no item ID exists, enter a description.
Category	Displays by default the category from the specified item or asset. If adding an item by description, select a category. Any bid factors that you assign to the specified category are added to the line bid factors.
Qty (quantity)	Enter the number of units to sell or buy.
Start Price	Enter the amount at which the bidding must start if Display and Must Beat Start Price is selected. If an item is selected, the system uses the item's standard unit price as a default.
Weighting	Enter a value to indicate the importance of the line item to the entire event. If you do not enter line weightings, each line item is weighted equally.

Advanced Definition Tab

Item SetID	Displays the setID the information for which the system tracks for consolidating requisitions across Purchasing business units.
Details	Click to access the Line Details page.
Bid Factors	Click to access the Line Bid Factors page.
Constraints	Click to access the Line Constraints page.
Line Comments and Attachments	Click to access the Line Comments and Attachments page.

Adding Line Details

Access the Line Details page (click the Details button on the Line Items: Advanced Definition page).

Line Details page (1 of 2)

Line Details page (2 of 2)

GoTo Line, Previous, Next	If an event has multiple lines, navigate to the details of a specific line or group by selecting the line number and description from the drop-down menu. Or page to the next line or previous line using the Next and Previous buttons.

Shipping Information

Quantity	Enter the quantity to be shipped.
Due Date	Select a due date for shipment.
Freight Terms	Select the freight terms to associate with this event.
Ship Via,Ship To, and **Ship From**	Enter values for these fields. Ship Via and Ship From are optional.

Note. If you selected External PO Integration on the Business Unit Definition page and are awarding events to an external purchasing system, you can have only one schedule per line.

Bid Parameters

Reserve Price	Enter the price that bidding must reach before you award the event to any bidder. Awards can still be posted if the reserve price is not met, but the system issues a warning.
Bid Required	Select this option if bids are required for this line of the event.
Minimum Quantity	Enter the minimum units on which a bidder must bid.
Maximum Quantity	Enter the maximum number of units on which a bidder can bid. If you select Allow Extra Quantity to be Bid, you can enter a value in this field that is greater than the requested line quantity.
Bid Quantity Rule	Select a value:

- *Allow Extra Quantity to be Bid:* Select to allow bidders to place bids for quantities beyond the requested event quantity up to the maximum bid quantity.

- *Bid Up to Maximum Quantity:* Select to allow bidders to place bids up to a maximum quantity for the line.

- *Quantity Not Applicable:* Select for non-item lines, such as extended warranties. Bidders must enter a bid price but not a bid quantity.

  If you copied from an amount-only *requisition,* this will be the default value for this field and you cannot change it. However, if you copied from an amount-only purchase order or contract, you can select a different bid quantity rule.

- *Requested Quantity Required:* Select to indicate that bidders must place bids for the requested quantity only.

Alternate Units of Measure Select one of these values to indicate whether bidders can bid on line items using alternate units of measure:

- *Any UOM* (any unit of measure): Bidders can select any existing unit of measure.

- *Not Allowed:* Bidders must bid using the specified line unit of measure. This is the default value.

- *Only existing item/uom's* (only existing item/units of measure): Bidders can select from a list of existing item and unit-of-measure relationships defined in the system.

Note. Use this field only with RFx events.

Note. If requisitions are associated with any of the lines on the event, then the value is automatically set to *Not Allowed.* In this case, you cannot change the value.

User Defined Price Breaks Select to indicate that price adjustments are required for the line item. Select to make the Minimum Quantity and Maximum Quantity fields available to enter price adjustments. You cannot select both User Defined Price Breaks and Bidder Defined Price Breaks.

Bidder Defined Price Breaks Select to indicate that bidders can define their own price tiers for the line item or group. You cannot select bothUser Defined Price Breaks and Bidder Defined Price Breaks.

Price Break - Minimum Quantity Enter the minimum quantity allowed for the specified tier. The quantity must be lower than the maximum quantity entered for the tier, and it must also be greater than the maximum quantity for the previous tier. This field appears only if you have selected the User Defined Price Breaks check box.

Price Break - Maximum Quantity Enter the maximum quantity allowed for the specified tier. The quantity must be greater than the minimum (requested) quantity entered for this tier. Also, if Allow Extra Quantity to be Bid is selected, the maximum quantity for the final price tier can exceed the line maximum bid quantity. This field appears only if you have selected the User Defined Price Breaks check box.

However, if Allow Extra Quantity to be Bid is selected and if a maximum bid quantity has been specified, you can enter a quantity to exceed the requested line quantity. However, the *total* bid quantity cannot exceed the maximum quantity for the line.

Entering Event Line Defaults

Access the Event Line Defaults page (click the Item Line Defaults link on the Event Summary page).

Event Line Defaults page

Default Options

Enter information such as specific shipping and delivery date information, and also indicate whether alternate units of measure are allowed as default values on the event lines.

Default	Select to indicate that the information entered on this page is the default information for all lines in the event. You can, however, change the information at a line level.
Override	Select to change any existing line shipping information to the information specified on this page.

Item Defaults

Due Date	Enter or select the date that the shipment is due.
Ship to Location and **Ship Via**	Select values to associate with the event line.

Alternate Units of Measure	Select one of these values to indicate whether bidders can bid on line items using alternate units of measure:

- *Any UOM* (any unit of measure): Bidders can select any existing unit of measure.

- *Not Allowed:* Bidders must bid using the specified line unit of measure. This is the default value.

- *Only existing item/uom's* (only existing item/units of measure): Bidders can select from a list of existing item and unit-of-measure relationships defined in the system.

Note. Use this field only with RFx events.

Freight Terms	Select the freight terms to use for the event lines.

Event Line Bid Factor Defaults

You can use this section to define and default bid factors to be applied to all lines of an event. According to your selections, the event line bid factor defaults defined here will be added to or override defaults specified in the Bid Factor Setup or Bid Factor Group Setup components.

See Chapter 7, "Creating and Using Bid Factors," Creating Bid Factors, page 97.

Bid Factors Default Option	

- *Do Not Apply - Disabled:* Disables the event line bid factor defaults. The system uses default bid factors and rules defined in the Bid Factor Setup and Bid Factor Group Setup components. This is the default value.

- *Apply Bid Factor Defaults:* Applies default bid factors defined on the Event Line Defaults page to all lines in an event.

Note. This option overrides defaults defined in the Bid Factor Setup or Bid Factor Group Setup components, unless you select the Append To on Copy From Event option.

Override Start Price Weight and **Start Price Weighting Default**	Select this option to override the default weighting for the price bid factor, if it is not valid for this event. Define a new start price weighting default that will replace the original value.
Ignore Setup Default Rules	Select this option to disable any line-level default bid factor setup rules. Only header and event level defaulting rules will be applied. If you have any bid factors in the Bid Factor Setup or Bid Factor Group Setup components that have defaulting rules defined for the line level, they will not be executed.
Append To on Copy From Event	Default line bid factors defined for the event will be appended to existing factors. When lines are selected for copy from events or templates, all bid factors for those lines will be copied over. There is no override.

Bid Factors	Define default line bid factors for the event. You must select *Apply Bid Factor Defaults* to activate the new default settings.

Adding Comments and Attachments to Sourcing Events

You can add comments and attachments at the header level and at the line-level.

This section discusses how to add and view comments and attachments.

Note. To improve performance for auction events, the comments button always appears with dots regardless of whether comments are present. For RFX events, the comment button appears without the dots if comments are not present.

Pages Used to Add Comments and Attachments to Sourcing Events

Page Name	*Definition Name*	*Navigation*	*Usage*
Event Header Comments and Attachments	AUC_COMM_SEC	Click the Event Comments and Attachments link on the Event Summary page.	Enter comments or attachments to appear at the header level. Display attachments and comments to bidders.
Line Comments and Attachments	AUC_COMM_LN_SEC	💬 Click the Line Comments and Attachments button on the Line Items: Advanced Definition page.	Insert comments or attach files pertinent to the line item. Display the attachments and comments to the bidders.
Standard Comments	AUC_STD_COMM_SEC	Click the Standard Comments link on the Event Header Comments and Attachments page or on the Line Comments and Attachments page.	Create a standard comment to use on the Header Comments and Attachments page.
Item Specifications	AUC_ITEM_SPEX	Click the Fetch Item Specs link on the Line Comments and Attachments page.	Include line item specifications on the event.

Attaching Comments and Files

Access the Event Header Comments and Attachments page to attach comments and files at the header level (click the Event Comments and Attachments link on the Event Summary page).

Access the Line Comments and Attachments page to attach comments and files at the line level (click the Line Comments and Attachments button on the Line Items Advanced Definition page).

Event Header Comments and Attachments page

Comments

Enter any specific comments for the event.

Send to Bidder	Select to enable the bidder to see the comment.
Include on Award	Select to enable the comments to appear on the contract or purchase order award.
Standard Comments	Click to access the Standard Comments page and select or edit predefined comments.
Fetch Item Specs	Click to access the Item Specifications page and add predefined item specifications to the line item. If you have defined item specifications for an item and they are marked to copy to transactions, they are added automatically as line comments.

Note. If you selected External PO Integration on the Business Unit Definition page, and you are awarding events to an external purchasing system, you can't include comments or attachments on events.

Adding Attachments

Attached File	Select the file to attach to this event.
Attachment Description	Enter a description (name) for the attachment.
Display to Bidder	Select this check box if you want this attachment to be available to bidders.
Include on Award	Select this check box if you want to include this attachment with the award.

| Include in Notifications | Select to include the attachment in the event invite and event interest notifications that are sent to the bidders. If you have a large attachment, you can select to display the attachment to the bidder on the bid response comment and attachment pages, but not include the attachment in the event invite and event interest email notifications. |

Files

When you post an event, the system generates a PDF file and optionally an XML file that describes the event. The PDF and XML files are attached to the email that notifies bidders of the event. You can see the PDF and XML files listed as attachments when you access the Header Comments and Attachments page. The PDF and XML files that the bidder receives are tailored to the bidder; for example, if you invite one bidder to all lines but invite another bidder to only one line, each bidder receives a PDF and an XML file showing only the invited lines.

You can view and retrieve all event documents for a buyer on the Event Files page. Click the View All Attachments for Event link on the Event Summary page.

See Also

Chapter 3, "Preparing to Implement PeopleSoft Strategic Sourcing," Creating Standard Comments, page 46

Adding Line Item Specifications

Access the Item Specifications page (click the Fetch Item Specs link on the Line Comments and Attachments page).

| Comment | Select any existing item specifications for the line item. |

Viewing Attachments and Files for an Event

You can view and retrieve all documents for an event for the buyer.

Page Used to View Attachments and Files for an Event

Page Name	*Definition Name*	*Navigation*	*Usage*
Event Files	AUC_EVENT_DOCS_SEC	Click the View All Attachments for Event link on the Event Summary page.	Displays all attachments and documents related to an event.

Viewing and Retrieving Attachments and Files

Access the Event Files page (click the View All Attachments for Event link on the Event Summary page).
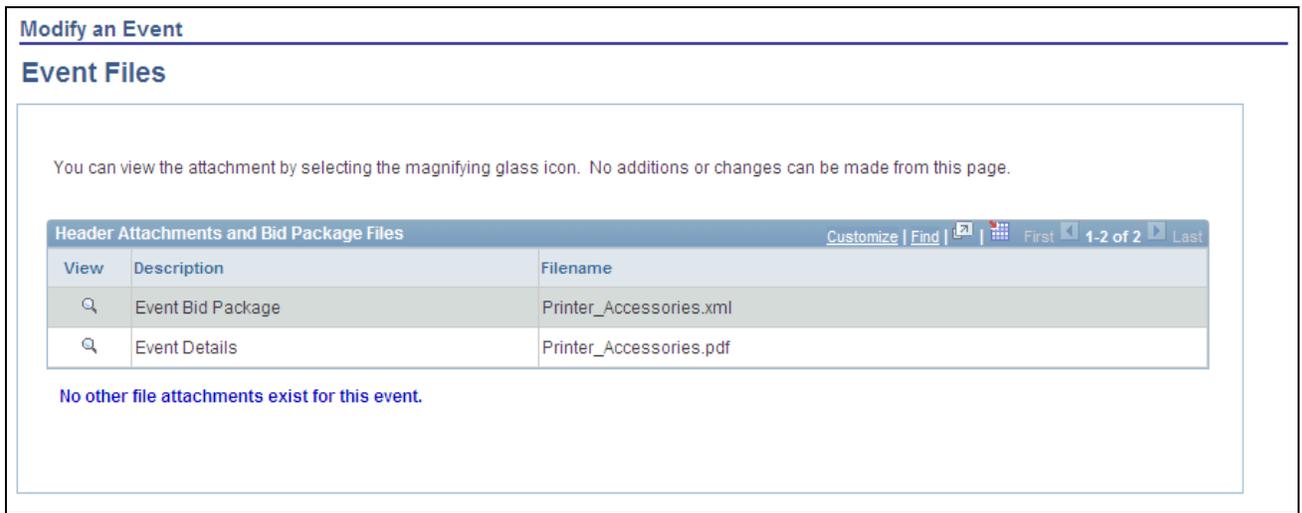
Event Files page

To view a file, click the View icon next to the desired document. The file will open in your browser. To download a copy, use the 'File, Save As' option found on your browser toolbar.

Adding and Maintaining Bid Factors for an Event

This section provides an overview of how bid factors are used on sourcing events, lists prerequisites, and discusses how to:

• Specify event bid factors.

• Assign clauses to bid factors.

• Specify bid factors at the line level.

Understanding Bid Factors on Sourcing Events

The PeopleSoft Strategic Sourcing bid factor functionality enables you to evaluate events based on factors such as price, warranties offered, lead time, and product quality. Bid factors are questions that bidders must answer about their products, services, or company. Scores are calculated based on the bidder's response compared to the best and worst or ideal response that has been defined for the bid factor. You can designate that a response is either mandatory or optional for a selected bid factor, and indicate that a bidder must provide a specific response for a bid to be accepted.

Users can add bid factors to an event by selecting from preestablished bid factors or by creating ad hoc bid factors, which are specific to an event. Bid factors, such as item category, item ID, quantity, or price, can also be supplied by default onto an event based on the defaulting rules that are associated with the bid factor. Users can also add a group of bid factors to an event. Bid factor groups can also be supplied by default based on the similar defaulting rules that can be established for individual bid factors.

If you are using PeopleSoft Supplier Contract Management, you can associate contract clauses with bid factors from within an event. In addition, you can select to include the clause information on an awarded supplier contract.

Bid Factor Groups and Defaulting Logic

You can automatically have bid factors and bid factor groups supplied by default onto sourcing events at either the header or line level, based on default rules that you assign to the bid factor or bid factor group as part of the bid factor setup process. Bid factors can be supplied by default based on item categories, item IDs, item quantities, and item prices.

When adding a bid factor group with an event, the system automatically adds all associated bid factors to the event. If a bid factor is associated with a group that has the same rule as the bid factor itself, the system always uses the default weighting from the group instead of the individual bid factor when setting the weighting on the event. For example, you have a bid factor of WARRANTY with a default line rule associated with the item category of Hardware with a weighting of 20 percent for that rule. You also have a bid factor group of COMPUTERS that has the bid factors of WARRANTY and DELIVERYDATE associated with the group and it also has a default line rule associated with the item category of HARDWARE. The WARRANTY bid factor is assigned a weighting of 30 percent and DELIVERYDATE is assigned a weighting of 10 percent within the group. If you add an item to the sourcing event that has a category of HARDWARE, the system by default supplies the WARRANTY bid factor based on the group weighting of 30 percent, not the individual bid factor weighting of 20 percent. You can optionally search for bid factors and groups by business units or departments.

See Also

PeopleSoft Supplier Contract Management 9.1 PeopleBook, "Defining Contract Agreements"

PeopleSoft Supplier Contract Management 9.1 PeopleBook, "Managing Contract Agreements"

Prerequisites

To assign contract clauses and service-level agreements to bid factors, you must have PeopleSoft Supplier Contract Management installed. In addition, you must also define any contract clauses and agreements before you can attach them to bid factors.

See Also

PeopleSoft Supplier Contract Management 9.1 PeopleBook, "Defining Contract Agreements"

PeopleSoft Supplier Contract Management 9.1 PeopleBook, "Managing Contract Agreements"

Pages Used to Add and Maintain Bid Factors for Sourcing Events

Page Name	Definition Name	Navigation	Usage
Event Bid Factors	AUC_FACTORS_PG	Sourcing, Create Events, Event Details, Event Summary Click the Event Header Bid Factors link on the Event Summary page.	Specify header-level bid factors that relate to the entire event.
Assign Contract Clauses	AUC_HDR_BF_CLAUSES	To add a contract clause to a bid factor, select a bid factor (with an associated contract clause) in the Bid Factor Code field. Click the View Bid Factor Clauses link on the Event Header Bid Factors page.	Add or view contract clauses associated with event header bid factors. **Note.** You must have PeopleSoft Supplier Contract Management installed to access this page.
Line Bid Factors	AUC_LN_FCTR_PG	Click the Bid Factors link for a line on the Line Items page.	Specify bid factors that relate to a line item.
Assign Contract Clauses	AUC_LN_BF_CLAUSES	Click the Line Items link on the Events Summary page. Select the Advanced Definition tab. Click the Bid Factors link for a specific line. Click the Add Clauses to Bid Factor link.	Add or view contract clauses associated with bid factors for line items.
Search Bid Factor Groups	BID_FCTR_GRP_SRCH	Click the Add Bid Factors by Group link on the Event Bid Factors page or the Line Bid Factors page.	Search for bid factor groups.
Search Bid Factors	BID_FCTR_SRCH	Click the Select Bid Factors link on the Event Bid Factors page or the Line Bid Factors page.	Search for bid factors by business unit or department.
Select a Clause	CS_CONTENTS_SEARCH	Click the Search button next to the Clause ID field on the Assign Contract Clauses page.	Perform an advanced search for clauses to be associated with bid factors.
Search for All Content Instances	CS_CONTENTS_XREF	Click the Where Used button on the Select a Clause page.	View where the particular clause has been used.

Page Name	Definition Name	Navigation	Usage
Dependent Clauses	BID_FCTR_CLSDEP	Click the View Dependent Clause button on the Assign Contract Clauses page.	View any dependent clauses for the bid factor. **Note.** This button is available only if dependent clauses exist. **Note.** Dependent clauses cannot be marked to include on contracts. Instead, dependent clauses will get added to the contract as part of the supplier contract generation process.

Specifying Event Bid Factors

Access the Event Bid Factors page (Sourcing, Create Events, Event Details, Event Summary; click the Event Header Bid Factors link on the Event Summary page).

Event Bid Factors page

Question   View or edit the bid factor question.

Display Bid Factor	Select to display the bid factor to the bidder. If this option is not selected, the bid factor is hidden from the bidder and you can enter a response in the bid analysis pages.
Bid Factor Response Required	Select if the bidder must enter a response for the specified bid factor before successfully posting a bid.
Ideal Response Required	Select if the bidder's response must match the specified best or ideal response for the bid to be eligible for award. Bidders who do not match the specified best or ideal response can still post their bids, but their bids will be disqualified and will not be eligible for award.
Include on Contract	Select if you want the bid factor to be included as a contract agreement if the event is awarded to a supplier contract. If agreement codes have been associated with a bid factor on the bid factor setup pages and you have selected to include them on a contract, than all of the assigned agreement codes are passed onto the awarded contract. If no agreements have been associated with the bid factor or if this is an ad hoc bid factor, the bid factor is passed on to the contract as an ad hoc agreement.
	Note. This field is displayed only if PeopleSoft Supplier Contract Management is installed.
Best and **Worst**	Displays the range of acceptable responses to the bid factor question for bid factor types of date, monetary, and numeric.
Ideal	Displays the preferred response to the bid factor question. This field appears for bid factor types for which no best and worst values (yes/no, text, and list) exist.
Select for Deletion	Select to mark a row for deletion.
Delete Selected Rows	Click to delete rows that have been marked.
Add Clauses to Bid Factor	Click to access the Assign Contract Clauses page to add contract clauses.
	Note. This link is available only if PeopleSoft Supplier Contract Management is installed.
View Bid Factor Clauses	Click to view any clauses that have been associated with the bid factor.
	Note. This link is available only if PeopleSoft Supplier Contract Management is installed.
Add Bid Factors by Group	Click to access the Search Bid Factor Groups page.
Select Bid Factors	Click to access the Search Bid Factors page to search for bid factors by business unit or department.

Adding Bid Factors by Group

Access the Search Bid Factor Groups page (click the Add Bid Factors by Group link on the Event Bid Factors page or the Line Bid Factors page).

To add bid factors by group:

1. On the Search Bid Factor Groups page, select a bid factor group code.

    You can also select a business unit and department. Click Search.

2. Select the Select check box for the bid factor groups that you want, and then click OK to add the bid factor groups to the line bid factors.

Creating and Modifying Ad Hoc Bid Factors

For any event, you can both edit existing bid factors and create new ones.

To create a new bid factor, enter the relevant data in the fields. The new bid factor applies only to the event for which you create it.

To edit a bid factor, select an existing bid factor and then modify the field information. The changes that you make to the bid factor apply only to the event for which you edit it.

Note. You can use the same procedures to create ad hoc bid factors at the line level.

Assigning Clauses to Bid Factors

Access the Assign Contract Clauses page (click the Add Clauses to Bid Factor link on the Line Bid Factors page).

Assign Contract Clauses page

Bid Factor Clauses

Contract clauses are defined on the Clause Definition page (Supplier Contracts, Manage Contract Library, Clauses).

See *PeopleSoft Supplier Contract Management 9.1 PeopleBook*, "Defining Supplier Contracts."

Clause ID	Select a clause to add to the bid factor.
🔍	Click the Look up Clause ID button next to the Clause ID field to search for contract clauses by clause ID, description, and title.
Search	Leave the Clause ID field blank and click this button to access the Select a Clause page to perform a more advanced search of all valid clauses.
Full Text	Displays the text associated with the contract clause to the sourcing bidders.
By Reference	Displays only the reference text associated with the clause to the sourcing bidders.

View Dependent Clauses   Click to view any dependent clauses.

                                      Note. Dependent clauses cannot be transferred onto awarded contracts. Any
                                      dependent clauses will automatically be added to the supplier contract as
                                      part of the supplier contract generation process.

Searching for Contract Clauses or Viewing Where-Used Information

Access the Select a Clause page (click the Search button next to the Clause ID field on the Assign Contract
Clauses page).

Select a Clause page

Important! You can access this page only by clicking the Search button next to the Clause ID field on the
Assign Contract Clauses page.

Clause Attributes   Enter or select fields to narrow the search criteria, for example, to clause
                                      ID, approval status, and created by.

Search   Click to retrieve clauses that meet the selected criteria.

Where Used Search   Click to view where clauses have been used.

Select   Click to select the contract clause that you want to associate with the bid
                                      factor.

| OK | Click to return to the Bid Factor Setup page. |

Specifying Bid Factors at the Line Level

Access the Line Bid Factors page (click the Bid Factors link for a line on the Line Items page).

Line Bid Factors page

| GoTo Line, Previous, Next | If an event has multiple lines, navigate to the details of a specific line or group by selecting the line number and description from the GoTo Line drop-down list. Or page to the next line or previous line using the Next and Previous buttons. |

Bid Factors

| Bid Factor Weighting | Enter a value to indicate the importance of the bid factor to the line item. The system then factors weightings into the score. |
| | You must enter weightings for bid factors if you want the bid factor responses to be scored. |

Include on Contract	Select if you want the bid factor to be included as a contract agreement if the event is awarded to a supplier contract. If agreement codes have been associated with a bid factor on the bid factor setup pages and you have selected to include them on a contract, then all of the assigned agreement codes are passed onto the awarded contract. If no agreements have been associated with the bid factor or if this is an ad hoc bid factor, the bid factor is passed on to the contract as an ad hoc agreement.
Increment	If price is the only bid factor and the event is an auction, enter the increment (if a sell event) or decrement (if a buy event) by which each bid must increase or decrease. Each new bid (for the entire line quantity) must equal or beat the previous bid by the bid increment or decrement amount. For example, if the current bid on a sell event is $3,000 and the increment is $500, then the next bid must be at least $3,500. When a new bid is posted, the system displays the amount of the new bid in the Worst field.
Add/View Clauses to Bid Factor	Click to access the Assign Contract Clauses page to add additional clauses to the bid factor or view previously assigned clauses.
	See Chapter 7, "Creating and Using Bid Factors," Assigning Contract Clauses to Bid Factors, page 109.

Adding Price Components

You can add price components so that bidders can specify the areas that make up the total price, such as labor or material. You can also include a weighting for each component. The sum of the weightings must total 100 percent.

Note. Price components can be added only to the price bid factor.

Creating New (Ad Hoc) Bid Factors

You can create ad hoc bid factors at the line level.

See Chapter 7, "Creating and Using Bid Factors," Scoring vs. Weighting, page 93.

Cost Contribution

Factor Cost Based on   Select a value to use as a basis factor for the cost.

- *Bid Quantity:* The system calculates the cost based on the bidder's bid factor response and maximum bid quantity using the following formulas:

  For Numeric and Date bid factors: ((Absolute Value of (Bidder's response − Best Response) × Cost Contribution × Maximum Bid Quantity) = Total Cost

  For Text ID factors: Unit cost entered during analysis × Maximum Bid Quantity

  For List bid factors: Selected list items Unit Cost x Maximum Bid Quantity

  For Yes/No bid factors: Bid Factor Response Unit Cost × Maximum Bid Quantity

- *Cost Range:* The system calculates the cost based on the bidder's bid factor response for numeric or date bid factors using this formula:

  ((((Bidder's Response − Best Response) × ((Worst Cost − Best Cost) ÷ (Worst Response − Best Response)) + Best Cost))) = Total Cost

  If the cost is applied per unit, the total cost will be multiplied by the maximum bid quantity.

- *Bid Price:* The system calculates the cost based on the bidder's bid factor response, maximum bid quantity, and unit bid price using the following formulas:

  For Numeric and Date bid factors: ((Absolute Value of (Bidder's response − Best Response) × Cost Contribution × Unit Bid Price × Maximum Bid Quantity) = Total Cost

  For Text bid factors: Cost Contribution × Bidder's Unit Bid Price × Maximum Bid Quantity

  For List bid factors: Selected list items Unit Cost × Bidder's Unit Bid Price × Maximum Bid Quantity

  For Yes/No bid factors: Bid Factor Response Unit Cost × Bidder's Unit Bid Price × Maximum Bid Quantity

- *Fixed Cost:* The system calculates the cost based on the bidder's bid factor responses using the following formulas:

  For List bid factors: Sum of the Flat Costs associated with the selected list items

  For Yes/No bid factors: If the bidder responds with the Ideal response, then the Best Cost is used. If the bidder does not respond with the Ideal response, the Worst Cost is used.

- *N/A:* A cost contributor does not apply for this bid factor.

  This is the default value.

- *User Defined:* The user enters a cost during analysis.

Apply Cost	Select *Per Unit* or *Total Cost.* This field is available only with *Cost Range.*
	Per Unit means that the cost that is calculated is multiplied by the maximum bid quantity to determine a total cost.

Using Global Policies and Constraints with Sourcing Events

This section provides an overview of global policies and constraints used with sourcing events, lists prerequisites, and discusses how to:

- Add event-level constraints.

- Add line-level constraints.

Understanding Global Policies and Constraints Used with Sourcing Events

PeopleSoft Strategic Sourcing enables you to define award constraints and set up defaulting rules so that the constraints can be supplied by default onto events. During the award process, the constraint rules are included in the optimization process so that the ideal award allocation can be recommended while ensuring adherence to the defined constraints. The constraints are also validated when you post awards.

See Also

Chapter 5, "Creating Global Policies and Constraints," page 55

Prerequisites

You must define constraints and global policies before attaching them to sourcing events.

See Chapter 5, "Creating Global Policies and Constraints," page 55.

Pages Used to Add Global Policies and Constraints to Sourcing Events

Page Name	Definition Name	Navigation	Usage
Event Constraints	AUC_CONSTRAINTS_PG	Click the Event Constraints link on the Event Summary page.	View or add constraints assigned at the event level.
Line Constraints	AUC_LN_CONST_SEC	Click theLine Items link on the Event Summary page. Click the Yes or No link in the Constraints column on the Line Items: Advanced Definition page.	Add or view constraints at the line level.

Adding Event-Level Constraints

Access the Event Constraints page (click the Event Constraints link on the Event Summary page).

Event Constraints page

| **Get Progress to Date** | Click to have the system retrieve the progress to date of meeting the constraint. |

Constraints

Constraint Code	Select from a predefined list of constraints or create an ad hoc, event-specific constraint by entering a unique constraint code
Apply	Select *Apply* or *Ignore.* If you select Ignore, the constraint will not be considered by the optimization engine when determining an ideal award allocation. It will also not be edited against when an award is posted.
Constraint Summary	View a description of the constraint. This field is display-only.

Sourcing Objective   Select a value to indicate whether the constraint must be met or is a targeted objective:

- *Target Goal*

- *Mandatory Goal:* If you select *Mandatory,* the priority is automatically set to *Critical.*

Priority   Select a priority for the constraint. Higher-priority constraints are met before lower-level objectives if optimization is used to determine an award.

Edit Constraint Attributes

You can edit any constraints that have been added to the event.

Constraint Based On   Select a value upon which the constraint should be based:

- *Awarded Amount*

- *Awarded Bidders*

- *Awarded Quantity*

- *Bid Factor*

Award Constraint   This field is available only if the Constraint Based On field is set to *Bid Factor.* Select a value to indicate the basis of the constraint used during the award process:

- *Price:* The constraint applies to the extended price of the award for all lines in the event.

- *Quantity:* The constraint applies to the awarded quantity for the entire event.

Award Basis   Select a value to indicate the basis for the award:

- *Amount:* Constraint will be based on a specified dollar amount or quantity.

- *Percent:* Constraint will be based on a percent of the quantity or amount awarded.

⊞   Click to add additional constraints to the event.

Constraint Based on Values

This table lists the different fields that are available in the Edit Constraint Attributes group box based upon the constraint based-on value.

Constraint Based-On Value	Available Fields
Awarded Amount: Indicates that the constraint is based on the amount awarded for the event per bidder.	Award Sign Value Award Basis Apply
Awarded Bidders: Indicates that the number of bidders must be awarded for the event.	Award Sign Value
Awarded Quantity: Indicates that the constraint is based on the quantity awarded for the event. You should use this option only for line-level constraints, not event-level constraints.	Award Sign Value Award Basis Apply
Bid Factor: Indicates that the constraint will be associated with a bid factor.	Bid Factor Code Bid Factor Sign Award Constraint Award Sign Value Award Basis Apply Expression

Adding Line-Level Constraints

Access the Line Constraints page (click the Yes or No link in the Constraints column on the Line Items Advanced Definition page).

Line Constraints page

Add any constraints at the line level.

See Chapter 9, "Creating Events," Adding Event-Level Constraints, page 174.

Inviting Bidders

To create bidder groups, use the Bidder Group (BIDDER_GROUP_COMP) component.

This section discusses how to:

- Invite bidders.

- Disallow bidders.

- Create bidder groups.

- Search for bidder groups.

Pages Used to Invite Bidders

Page Name	*Definition Name*	*Navigation*	*Usage*
Invite Bidders	AUC_DISPATCH_PG	Click the Bidder Invitations link on the Event Summary page.	Announce an event and solicit bids from registered bidders, vendors, or customers. Specify that bidders place bids on certain line items only. Invite bidders who are not currently vendors or customers.
Bidder Details	AUC_DISP_ADDR_SEC	▤ Click the Contact Details button on the Invite Bidders page.	View contact information about the bidder.
Public Event Contacts	AUC_DISP_CNTCT_SEC	Click the Contact Bidders button for a bidder ID.	View and enter contacts for a public event.
Assign Bidders to Lines	AUC_DISP_LINE	Click the Dispatch Lines link on the Invite Bidders page.	Invite specified bidders to bid only on certain line items. If the event is a public event, the Dispatch Lines link is disabled, because bidders are invited to all lines for public events.
Search for Bidders	AUC_BIDDER_SRCH_M	Click the Search for Bidders link on the Invite Bidders page.	Search for bidders and select bidders to invite to an event.
Bidder Group Details	BIDDER_GROUP	Click the Save Bidders as Group link on the Invite Bidders page.	(Optional) Save the list of invited bidders as a group that can be used to invite to subsequent events.
Bidder Search	AUC_BIDDER_SRCH_M	Click the Search for Bidders to Add link on the Bidder Group Details page.	Add bidders to bidder groups.

Inviting Bidders

Access the Invite Bidders page (click the Bidder Invitations link on the Event Summary page).

Invite Bidders page

Public Event	Select to make the event available to any interested party. For all events, bidders must be registered to bid. When you select Public Event, a bidder called PUBLIC_AUC appears on the bidder list. You can use the PUBLIC_AUC bidder to invite unregistered bidders. Click the Contact Details button and enter the names and the email addresses of the people to invite.
Dispatch Method	Select to determine the dispatch method for sending an invitation. Options are *Email, Fax,* and *Printed Document.* This method appears by default from the business unit setting.
Search for Bidders	Click to access a sortable list of bidders to use for sending invitations.
Dispatch Lines	By default, bidders are invited to bid on all line items. Click to specify that a bidder is invited to bid on certain line items only.
Save Bidders as Group	Click this link if you want to save the bidders for this event as a group. The system accesses the Bidder Group Details page, where you can enter bidder group information. See Chapter 9, "Creating Events," Creating Bidder Groups, page 182.
Invite Status	After an event is posted, the status appears to indicate whether an invited bidder has accepted or declined the event invitation.
(Contact Details icon)	Click the Contact Details button to view or update contact information about the invited bidders.
Renotify	Click to resend event notices and updates to selected suppliers.

Placing Bids on Specific Line Items

In some cases, you must invite a bidder to bid on specific lines but not on the entire event. For example, suppose that you create a buy event to purchase software and training. You would invite vendors who handle only training to bid on the training line item but not the software line item.

To invite a bidder to bid on specific line items:

1. Invite that bidder to the event.

2. In the Select column, select the check box next to the bidder's name.

   You can select multiple bidders, if you plan to invite them to bid on the same line items.

3. Click the Dispatch Lines link.

   Note. For public events, bidders can't be invited to selected lines. Therefore, the Dispatch Lines link is disabled if the event is public.

4. In the Select column of the Assign Bidder to Lines page, select the check boxes next to the line items on which you want the bidders to bid.

5. Click OK.

Adding Bidders Who Are Not Registered Bidders, Customers, or Vendors

You may need to invite people who are not on your bidder, customer, or vendor list.

To send invitations to those individuals or organizations that may be interested in a specific public event:

1. Click the Contact Details button on the PUBLIC_AUC line.

2. On the Contact Details page, enter the name and email address of the bidder to invite.

3. Click the Add button to create new lines on which to enter additional names and addresses.

   Note. Invitation recipients are required to register before bidding on the event.

Disallowing Bidders

Access the Invite Bidders page (click the Bidder Invitations link on the Event Summary page).

To disallow a bidder:

1. Select Delete to remove the bidder from the event.

   If the bidder has already posted one or more bids on the event, the system alerts you that all posted bids are canceled for this bidder.

2. Confirm to remove the bidder from the invite list.

   The bidder no longer is able to bid on the event.

   Any of the bidder's posted bids are canceled or disallowed.

Creating Bidder Groups

Access the Bidder Group Details page (click the Save Bidders as Group link on the Invite Bidders page).

Bidder Group Details page

To add a bidder group:

1. Enter the name in the Bidder Group ID field.

2. Enter the group name in the Bidder Group Name field.

3. In the Save Group As field, select *Department* or *Personal.*

    If you select *Department,* the department number and name appears. Users who are associated with the specified department will have access to the bidder group. If you select *Personal,* the bidder group is available only to the specific individual who created it.

Modifying Bidder Groups

Access the Bidder Group Details page (Sourcing, Create Events, Bidder Group Setup, Bidder Group Details).

Bidder Group Details - Bidder Group Setup page

Send Email to Bidder Group	Click this button to create and send an email notification to members of an existing bidder group outside of a specific event.
	On the Email Notification page, only bidder contacts with valid email addresses will be included in the Send To line.

Searching for Bidders

Access the Bidder Search page (click the Search for Bidders link on the Invite Bidders page).

Bidder Search page

Bidder Type	Select a value of *Bidder* to search for bidder groups or bidder contacts. Bidder groups may contain any combination and number of bidders, vendors, and customers.
Contact	Enter the contact name of the bidder company you would like to invite. If you search by the company name, the default contact appears in the search results. Only the invited contact for a bidder company has access to view the event, place bids, and view bidding activity.
Group ID	Select to search for a bidder group by group ID.
	This field works with the Bidder Type field. If you select a bidder type of *Vendor,* then the system returns vendor quote groups. To search for a bidder group, you must select a bidder type of *Bidder.*
Group Name	Select to search for a bidder group by group name.
	This prompt works with the Bidder Type field. If you select a bidder type of *Vendor,* then the system returns vendor quote groups. To search for a bidder group, you must select a bidder type of *Bidder.*

Optional Organization Criteria	Select criteria to search for suppliers based on optional registration questions. Criteria include:

- *Women-Owned Business*

- *Emerging Small Business*

- *Disabled*

- *Veteran*

- *HUBZone Program*

- *Size of Small Business*

- *Veteran-Owned Small Business*

- *Sm Disadvantaged Business Prog* (small disadvantaged business program)

- *Other Preference Programs*

- *Ethnicity*

Results Option	Select from the drop-down list to modify the search results. Options include:

- *Display Bidder/Company Id Only:* This is the default option. Select to show the bidder or company ID. The invitation is sent to the primary contact for a company with multiple contacts.

  If you select all bidder types (Bidder Type field is blank) and click the Recommend Bidders button, the results option defaults to *Display Bidder/Company Id Only* and the other options are not available.

- *Display All Contacts:* This option returns all individual contacts in the search results.

- *Display Contacts Of Type:* This option is available only with the *Vendor* bidder type selected. Select a contact type in the Type drop-down menu.

Search	Click to retrieve the rows of information.

Recommend Bidders	Click to search for matches by bidder type *(Bidder, Customer,* or *Vendor)* and the items or item categories in event lines. Select a Bidder Type from the drop-down menu, or if none is selected, search for all bidder types. You can find the bidders whose Self Categorization Tree setup matches the item categories for the event, which are listed on the Line Items page - Basic Definition tab.
	If you select a bidder type of *Vendor,* results show vendors that have an item-vendor relationship, based on the items found in the event lines.
	If the Invite to Entire Event check box is selected, then selected bidders in the Recommend Bidders search results will be invited to the entire event. If the Invite to Entire Event check box is deselected, then selected bidders will be invited to only those lines for which their Self Categorization Tree setup matches the item category on the line, or for a Vendor search, where the item-vendor relationship matches the items in the event lines.
	See Chapter 3, "Preparing to Implement PeopleSoft Strategic Sourcing," Setting Up Bidder Categorization Trees, page 32.
	See Chapter 9, "Creating Events," Basic Definition Tab, page 152.
Invite	Select the check box for each company that you want to invite to the event. You can also click the Select All link to select all the companies at one time.

Event Collaboration

Click the Event Collaborators link on the Event Summary page (Sourcing, Create Events, Event Details) to route an event for collaboration.

The event collaborator can access only events to which the collaborator has been invited. Only events with an event status of *Collaborating Event* will display on the Event Collaboration search results page (Sourcing, Create Events, Event Collaboration).

See Chapter 10, "Using Event Collaboration," page 195.

Posting Events

Use the Event Summary page (Sourcing, Create Events, Event Details) to post sourcing events.

When you post an event, the system generates a PDF file and optionally an XML file that describes the event. The PDF and XML files are attached to the email that notifies bidders of the event. You can see the PDF and XML files listed as attachments when you access the Header Comments and Attachments page or you can access all documents for an event when you access the Event Files page. The PDF and XML files that the bidder receives are tailored to the bidder; for example, if you invite one bidder to all lines but invite another bidder to only one line, each bidder receives a PDF and an XML file showing only the invited lines.

Note. An XML version is created if you select the Allow Bidder XML Downloads option on the Sourcing Business Unit Definition page (Set Up Financials/Supply Chain, Business Unit Related, Sourcing) or the Event Settings and Options page.

See Chapter 15, "Analyzing Bids and Awarding Events," Posting Awards, page 304.

Making Changes to Posted Events

While the event is in a *Posted* status:

• Invite new bidders.

• Edit header and line comment and attachments.

• Extend the event.

• Change a reserve price.

Setting Asset Status

If you use PeopleSoft Asset Management, follow these guidelines:

• For you to enter an asset as a line item for sale in an event, the strategic sourcing status for the asset must be *Allowed to be Auctioned.*

• Once you post the event, the asset management status changes to *Sent to Auction.*

• The status remains *Sent to Auction* until the event is awarded or canceled.

• Once the auction is awarded, the PeopleSoft Asset Management status changes to *Sold in Auction.*

If the event is not approved or awarded, set the event status to *Canceled* to change the asset management status from *Sent to Auction* back to *Allowed to be Auctioned.*

See Also

Chapter 15, "Analyzing Bids and Awarding Events," Posting Awards, page 304

Adding and Maintaining Sourcing Event Templates

This section provides an overview of sourcing event templates and discusses how to copy templates.

Understanding Sourcing Event Templates

You can save events as templates to reuse in future events and associate an event template to business units, departments, or a specified user, based on the user's security. You can also create templates using Sourcing, Create Events, Maintain Event Templates. In addition, users with the appropriate security can modify templates. PeopleSoft Strategic Sourcing users can copy templates to expedite the event creation process.

You can save a template as a business unit, department, or personal template. If a template is marked as a business unit template, it is available to all users who have access to that business unit. If a template is marked as a department template, you can associate one or more departments to the template. Only users assigned to the associated departments can copy from department templates. If a template is marked as a personal template, only the user who created the template has access to it.

See Also

Chapter 9, "Creating Events," Adding and Maintaining Sourcing Event Templates, page 187

Pages Used to Add and Maintain Sourcing Event Templates

Page Name	Definition Name	Navigation	Usage
Enter Copy Criteria	AUC_COPY_SEC	Sourcing, Create Events, Event Details Select *Sourcing Template* in the Copy From field on the Event Summary page.	Select sourcing template lines to copy to an event.
Search Templates	AUC_TMPLTE_SRCH	Click the Search Templates button on the Enter Search Criteria page.	Search for templates.
Template Info (template information)	AUC_TMPLTE_MAINT	Sourcing, Create Events, Maintain Event Templates	Create and maintain event templates.

Copying Templates

Access the Enter Copy Criteria page (Sourcing, Create Events, Event Details; select *Sourcing Template* in the Copy From field on the Event Summary page).

Enter Copy Criteria page

You use the Strategic Sourcing User Preferences page to specify the transactions from which users can copy.

You can use several documents to create one event. The system consolidates identical line items. For example, if you copy from three different requisitions that all contain an identical line item, that line item appears only once on the new event.

Note. If you selected External PO Integration on the Sourcing Business Unit Definition page and are awarding events to an external purchasing system, you can copy only from sourcing events, sourcing templates, and RFIs.

See Chapter 2, "Setting Up Business Units in PeopleSoft Strategic Sourcing," page 15.

Copy Template

Copy From   Select *Sourcing Template.* You can use an event template to copy the entire
                                       event details onto any event.

See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining User Preferences," Defining Strategic Sourcing User Preferences.

Select Criteria

Copy Method	Select the way the system copies the information. Values are:

- *Override:* The system replaces any existing information for the event with the data from the template.

- *Append:* The system adds information to existing event information but does not write over any fields that contain data.

Copy Criteria

Enter identifying information into a field to search for a template. Narrow the search response by entering criteria in more than one field.

Creating RFI Events

This section discusses how to:

- Create RFIs.

- Specify RFI details.

Pages Used to Create RFI Events

Page Name	*Definition Name*	*Navigation*	*Usage*
Event Settings and Options	AUC_OPTIONS_PG	Sourcing, Create Events, Event Details Click the Event Settings and Options link on the Event Summary page.	Enter basic RFI information.
Enter Copy Criteria	AUC_COPY_SEC	Select *Request for Information* from the Copy From list on the Event Summary page.	Use a previous RFI or sourcing template as the basis for the new RFI event. See Chapter 9, "Creating Events," Copying Events from Other Transactions, page 134.
Event Lines to Copy	AUC_COPY_RFI	Enter the copy criteria information on the Enter Copy Criteria page and click OK.	Select the bid factors to be copied to the new RFI event.

Page Name	Definition Name	Navigation	Usage
Event Header Comments and Attachments	AUC_COMM_SEC	Click the Event Comments and Attachments link on the Event Summary page.	Enter comments or attachments to appear at the header level for the RFI. Display the attachments and comments to the bidders.
Standard Comments	AUC_STD_COMM_SEC	Click the Standard Comments link on the Event Header Comments and Attachments page.	Create a standard comment to use on the Header Comments and Attachments page.
Invite Bidders	AUC_DISPATCH_PG	Click the Bidder Invitations link on the Event Summary page.	Announce an event. Solicit bids from registered bidders, vendors, or customers. Invite bidders who are not currently vendors or customers.
Search for Bidders	AUC_BIDDER_SRCH_M	Click the Search for Bidders link on the Invite Bidders page.	Search for bidders and select bidders to invite to an event.
Template Info (template information)	AUC_TMPLTE_SEC	Click the Template Info link on the RFI Details page.	Save the event as a template.
Invite Collaborators	AUC_EVENT_COLLAB	Click the Invite Collaborators link on the RFI Details page.	Invite collaborators to participate in creating the event. See Chapter 10, "Using Event Collaboration," page 195.
Find Collaborators	AUC_COLLAB_SRCH	Click the Find Collaborators link on the Invite Collaborators page.	Search for collaborators and select collaborators for an event.
RFI Bid Factor Comments and Attachments	AUC_COMM_BF_SEC	Click the Add Attachment button on the RFI Details page.	Add attachments to the RFI event.

Creating RFIs

You create RFIs similarly to how you create events.

1. You can copy from an existing RFI or sourcing template using the Enter Copy Criteria page.

    See Chapter 9, "Creating Events," Copying Events from Other Transactions, page 134.

2. Add basic RFI information using the Event Settings and Options page.

   Add RFI details, such as whether you want the event scored and whether you want to associate the RFI with a specific item category, whether you want to display the round and version to bidders, and whether bidders must respond to all bid factors.

3. Invite bidders to participate in the event.

   See Chapter 9, "Creating Events," Inviting Bidders, page 178.

4. Save the event as a template to copy it later.

   See Chapter 9, "Creating Events," Adding and Maintaining Sourcing Event Templates, page 187.

5. (Optional) Invite internal collaborators to participate in the event creation.

   See Chapter 10, "Using Event Collaboration," page 195.

6. Request bidder responses to event questions using the Bid Factor Question page.

   If the questions require a list, enter the items on the Bid Factor List Items page.

7. Add bid factor comments and attachments to send to the bidder or include on the award.

8. Display the bid factors to the bidders by selecting the Display check box.

Specifying RFI Details

Access the Event Settings and Options page (Sourcing, Create Events, Event Details; click the Event Settings and Options link on the Event Summary page).

Event Settings and Options page (RFI)

Score RFI Event(score request for information event)   Select to calculate a score for RFI responses. If this option is deselected, the system hides the Best, Worst, Ideal, and Weighting fields on the Bid Response page.

See Also

Chapter 9, "Creating Events," Defining Basic Event Information, page 128

Chapter 10

Using Event Collaboration

This chapter provides an overview of event collaboration and discusses how to:

*   Collaborate on event creation.

*   Collaborate on event analysis.

Understanding Event Collaboration

Often during a sourcing event, there are multiple stakeholders involved in the event. While the event creator is usually the buyer responsible for the event, the buyer may not have all of the information that is critical to the event. Therefore, it is important for the event creator to distribute the event to the stakeholders for input prior to posting the event. This also enables the event creator to get everyone's input into the event and ensure that everyone agrees on the overall objectives of the procurement.

Collaboration also might be useful during the bid analysis of RFx and RFI events. One stakeholder may feel that price is more important than warranty, while another stakeholder responsible for the cost of replacing parts that are not under warranty may feel warranty is more important than price. By allowing the stakeholders to review the bids and provide input on bid factor weightings, hidden bid factors, and text based scoring, the buyer can be certain that the interests of all the collaborators are factored in on the award decision. The system calculates an average score based on the input of all the collaborators.

You can invite any users with a role of *Event Collaborator* to contribute to event creation or analysis. During event creation, collaborators access the Event Summary page (Sourcing, Create Events, Event Collaboration), then check out the event and enter their input as to bid factor weightings and so forth. Once collaboration is complete, the event creator can review the input and decide which changes to accept. The system then updates the event based on the accepted changes.

During bid analysis, collaborators can manually score text-based bid factors, enter responses to hidden bid factors, and change bid factor weightings. The system calculates an average score across all collaborators.

Collaborating on Event Creation

This section discusses how to:

*   Collaborate during event creation.

*   Invite collaborators.

*   Checking events in and out.

- Review event collaboration input.

- Review event collaboration constraint details.

Pages Used to Collaborate on Event Creation

Page Name	Definition Name	Navigation	Usage
Event Summary	AUC_CREATE_PG	Sourcing, Create Events, Event Collaboration	Enter header information.
Event Collaboration Details	AUC_EVENT_COLLAB	Click the Event Collaborators link on the Event Summary page.	Invite internal users to collaborate on event creation.
Find Collaborators	AUC_COLLAB_SRCH	Click the Find Collaborators link on the Event Collaboration Details page.	Search for collaborators to invite to participate in the event.
Event Workbench	AUC_MANAGE_EVENTS	Sourcing, Maintain Events, Event Workbench	To collaborate on events, check them in and out.
Review Event Collaboration - Event Header	AUC_COLLAB_HDR	Select the View Collaboration link on the Event Details page.	Used by the event creator to view collaborators' event input.
Description	AUC_COLLAB_HDR_SEC	Click the Description button on the Review Event Collaboration - Event Header page.	View changes to the event description field.
Review Event Collaboration - Event Lines	AUC_COLLAB_LN	Click the Event Lines link on the Review Event Collaboration - Event Header page.	Click to review the event collaboration by line.
Review Event Collaboration - Bid Factors	AUC_COLLAB_FCTR	Click the Bid Factors link on the Review Event Collaboration - Event Header page.	Click to review the event collaboration by bid factor.
Review Event Collaboration - Comments and Attachments	AUC_COLLAB_ATTCH	Click the Comments and Attachments link on the Review Event Collaboration - Event Header page.	Click to review the event collaboration comments and attachments.
Full Comment Text	AUC_COLLAB_CMMTS1	Click the Event Comments button on the Review Event Collaboration - Comments and Attachments page.	View changes to the event comments field.

Page Name	Definition Name	Navigation	Usage
Review Event Collaboration - Invited Bidders	AUC_COLLAB_DISP	Click the Invited Bidders link on the Review Event Collaboration - Event Header page.	Click to review the event collaboration by invited bidder.
Review Event Collaboration - Constraints	AUC_COLLAB_CONST	Click the Constraints link on the Review Event Collaboration - Event Header page.	View changes to the event level or line level constraints during the event collaboration process.

Collaborating During Event Creation

Here's the process for collaborating an event:

1. Access the Invite Collaborators page and select users with the role of event collaborator to invite to the event.

   Click Route on the Event Details page to route the event to the first collaborator.

   The event status then changes to Collaborating Event and the Collaboration Status is set to *Available for Checkout.*

   Note. The event creator can create a new version of the event and invite collaborators to have a snapshot of the event before and after collaboration. This enables the event creator to compare the previous version to the current collaborated version.

2. The system sends an email notification to all invited collaborators.

   The first collaborator receives a worklist entry immediately; the rest of the collaborators receive a worklist entry once the current collaborator completes his or her collaboration input based on the routing sequence entered.

3. The collaborators access the event through the Event Collaboration component (Sourcing, Create Event, Event Collaboration).

   The collaborators check out the event through the Event Workbench (which changes the Collaboration Status to *Checked Out*), make any changes, and then route the event to the next collaborator (which changes the status to *Available for Checkout*).

   The event creator and event collaborators see the event as changed by the previous collaborator.

4. Once the collaboration is done, the system notifies the event creator by email and worklist entry.

5. The event creator can cancel the collaboration and remove collaborators from the event.

   If the collaboration is canceled, the event is available for posting.

   If the event creator removes a collaborator from the collaborator's list, the removed collaborator receives an email notification indicating that he or she has been removed.

See Also

Inviting Collaborators

Access the Event Collaboration Details page (click the Event Collaborators link on the Event Summary page).

Event Collaboration Details page

Collaboration Due Date	Enter the date that the collaboration is finished. This date must be before the preview date of the event.
Save as Group	Click to save the selected list of collaborators as a group. The system makes the Collaboration Group and Description fields available for entry. For future collaborations, you can select the group instead of individual collaborators.
Routing Sequence	Enter a routing number for each collaborator.

Checking Events In and Out

Access the Event Workbench page (Sourcing, Maintain Events, Event Workbench).

	Click to check out the event for collaboration.
	Indicates that the event is checked out by a collaborator and isn't available.

See Also

Chapter 12, "Managing Events," page 215

Reviewing Event Collaboration Input

Access the Event Workbench page (Sourcing, Maintain Events, Event Workbench).

Click to move to the Review Event Collaboration page to view collaboration on the selected event.

Review Event Collaboration page

Event Action	Select *Accept* or *Reject* for each collaborator's change. If you don't select an action, the system uses the values entered by the last collaborator. Whichever value you accept, the system automatically rejects the other values for that field or change. Also, if you accept a previously entered value, it rejects the current value.
	For example, let's say that the warranty bid factor has a best value of 5 years, and that collaborator 1 changes it to 4, and collaborator 2 changes it to 3. If someone accepts 4, then 3 is rejected.
Update	Click to indicate which action you want the system to accept.
Comments	Enter a comment for why you are accepting or rejecting that input. The system records accept and reject actions in the Comments field also so that you can view the collaboration history.
Update Event	After you have accepted or rejected all the input, click to update the event with the selected input. The changes are made to the event and you are transferred back to the Event Details page where you can review the updates.
	Note. Occasionally, collaborators can make conflicting changes. For example, if the event creator accepts the change that the bidder must beat the winning bid, and also accepts the change that the winning bid should not be displayed to bidders, then there is a conflict. These two changes conflict because if the bidder must beat the winning bid, the winning bid must appear. In cases like this, the system informs the event creator when the event creator clicks Update Event button, indicating that a conflict exists. All updates are made to the event, except for the change that caused the conflict.

See Also

Reviewing Event Collaboration Constraint Details

Access the Review Event Collaboration - Constraints page (click the Constraints link on the Review Event Collaboration - Event Header page).

Review Event Collaboration - Constraints page

Event Constraints - Collaboration Input tab

This section displays changes to the event-level constraints during the event collaboration process.

The Event Line grid displays changes made to constraints associated with the line items.

Collaborating on Event Analysis

This section discusses how to:

- Collaborate during event analysis.

- Invite collaborators.

- Enter analysis feedback.

Pages Used to Collaborate on Event Analysis

Page Name	Definition Name	Navigation	Usage
Analyze Total	AUC_AWARD_PG	Sourcing, Maintain Events, Analysis Collaboration, Analyze Total	Review each bidder's overall bid, score, and cost.
Score Text Bid Factors	AUC_AWARD_HTXT_SEC	Click the Text Bid Factor Score button on the Analyze Total page.	Manually score text bid factor responses and incorporate this score into the total score. Collaborators may optionally enter text response cost contributions as well on this page.
Price Component Detail	AUC_AWD_CLB_PRCMPT	Click the Price Component Detail button on the Analyze Line page.	View price component details entered by each collaborator. Collaborators may adjust the weightings of the price components during the collaboration process.
Analyze Line (summary)	AUC_ANALYZE_HDL_PG	Click the Analyze Line link on the Analyze Total page.	Review each bidder's bid for each line item in the event, including scores and cost.
Analyze Line (bids by line item)	AUC_ANALYZE_LN_PG	Click the Analyze link for an item on the Analyze Line (summary) page.	Review bid details for each line item.
Event Collaboration Details	AUC_EVENT_COLLAB	Click the Invite Collaborators link on the Analyze Total page.	Invite internal users to collaborate on event analysis.

Collaborating During Event Analysis

Here's the process for collaborating during event analysis:

1. The collaborator accesses the Analyze Total page (Sourcing, Maintain Events, Analysis Collaboration, Analyze Total).

   Note. Collaborators can access only events to which they have been invited to collaborate.

2. Once bids have been received and the event is available for analysis, the event creator can distribute the event for bid analysis collaboration using the Invite Collaborators page.

   If collaborators were invited to collaborate on the event creation, they will automatically default in on the analysis Invite Collaborators page.

3. While collaborators are analyzing the event, the system sets the event status to *Collaborating Bid Analysis.*

   The collaborators use the Analyze pages to indicate their weightings for each bid factor, enter responses to hidden bid factors, and manually score text-based responses. Collaborators may also enter cost contributions for text-based bid factors and other bid factors marked as having user-defined cost contributions.

   The system calculates the average weighting, score, and cost based on the collaborators' input.

4. The event creator can't see the collaboration input until the collaboration due date and time has passed or the collaborators have finished entering their input, whichever occurs first.

   The Update Event Status process sends a worklist item and email notification to the event creator if the collaboration due date has passed before all the collaborators have provided their input.

5. The event creator can review the input, including the bid factor weightings set by each collaborator, and decide on which score to base the award decision.

See Also

Chapter 7, "Creating and Using Bid Factors," page 91

Chapter 15, "Analyzing Bids and Awarding Events," page 283

Inviting Collaborators

Access the Event Collaboration Details page (click the Event Collaborators link on the Event Summary page).

Event Collaboration Details page - Analysis Collaboration

Collaboration Due Date   Displays the date that the collaboration input is due.

Save as Group	Click to save the selected list of collaborators as a group. The system makes the Collaboration Group and Description fields available for entry. For future collaborations, you can select the group instead of individual collaborators.
Show Bidder's Name	Click to show the bidders' names to the invited collaborators during analysis collaboration. If you leave the check box deselected, the collaborators won't see the bidders' names, which might make the collaboration more impartial.
Route To	Click to route the event for analysis collaboration. This makes the event read only for non collaborators until the collaboration due date, and thus, it can't be awarded.

Entering Analysis Feedback

Access the Analyze Total page as a collaborator (Sourcing, Maintain Events, Analyze Event).

Collaborators can suggest changes to weightings, enter user-defined bid factor costs, manually score text bid factors, and answer hidden bid factors.

	Click to manually score text bid factor responses. If the text bid factor is a cost contributor, you can enter a cost in addition to a score for the bid factor.
	Click to choose list values as part of collaboration input.

Scoring Text Bid Factors

Access the Score Text Bid Factors page (click the Text Bid Factor Score button on the Analyze Total page).

Score Text Bid Factors page

Bid Factor Cost   (Optional) Enter a numeric value for the text bid factor cost.

Analyzing User Defined Costs

Access the Analyze Total page (Sourcing, Maintain Events, Analyze Event).

Display Options   Select *View Factor Costs* if you want to enter user defined costs for date or
                                       numeric bid factors.

Chapter 11

Negotiating Events Using Multiple Rounds and Versions

This chapter provides an overview of multiversion and multiround events and discusses how to:

* Create multiversion events.

* Create multiround events.

Understanding Multiversion and Multiround Events

You can create multiversion and multiround events to negotiate with bidders.

Bidders always bid on the most current posted event version and round. You have the option to hide the round or version number from bidders.

This section discusses:

* Multiversion events.

* Multiround events.

Multiversion Events

Create multiversion events when you need to make changes to a posted event. Once a new version is created, you can't delete lines or bid factors because bids to the previous version would include those lines and bid factors.

You can create and edit versions of multiversion events. When you are viewing a multiversion event in the Event Workbench component, the system displays the most recent version of the event. The new version of the event must be posted to be available for bidding.

You click the Edit Current Version button to change the most current version of the event and access the Event Details pages in Update/Display mode. This button is available only for multiversion events; it isn't available if the New Event Version Required check box is selected on the Business Unit Definition page, or if the event status is *Awarded* or *Canceled.*

You click the Create New Version button to create a new version of an event and access the Events Details page in Add mode. When you click the Create New Version button:

* You create a new version of the event.

- The system increments the version number by one.

- The previous current version of the event becomes read-only upon posting the new version, and you cannot make additional changes to that version.

  Note. The previous posted version is available for bidding until a newly created version is posted, not created. So if bidders are bidding on version 1, that is the version on which they have access to bid until version 2 is posted.

- If a new round is created for the event, the system resets the version number to 1.

  The version number is incremented by 1 for the specified round if you modify the event. For example, when you create a new event, it is round 1, version 1. If you change the event and create a new version, then the event is round 1, version 2. If you create a new round, the event is round 2, version 1. If you change the event at this point, the event is round 2, version 2.

- If any scoring-related changes are required, you must create a new round.

If a new version is created for an event with line groups, all of the line group information is copied onto the new version.

Bidder Participation in Multiversion Events

If a new version is created for an event, the bidder's invitations statuses should be carried forward to the new version, meaning that if a bidder accepted on version 1, the system keeps that bidder's status as accepted for version 2. If an invited bidder declined on version 1 but wanted to be kept informed of event updates, the bidder should show declined for version 2 but still receive updates on version 2. If a public bidder who was not explicitly invited to version 1 accepts the event invitation, the bidder should be accepted for version 2.

Multiround Events

Use multiround events for RFx events to negotiate with bidders after initial bids are received. This is useful when you make either substantive changes to the event (requiring additional input from the bidders) or when you evaluate and narrow bids to a select group for further negotiation.

You can select to counter one or more bidders for the overall event or for individual lines using the Analyze Total and Analyze line pages. The system creates the new round by copying the previous round/version. Countered bidders are the invited bidders for the new round. Only countered lines are included in the new round. You can add additional bidders if necessary.

The system provides the best bid factor responses for the countered responses from the previous round as the new default worst values for the new round. For example, warranty is a bid factor with 1 as the worst and 5 as best. Bidder A bids 2 years and Bidder B bids 3 years for the warranty. Both bidders are countered. Round 2 now has warranty with a default worst response of 3 years and best response of 5 years. You can override the new defaulted worst responses on the new round.

If a line was partially awarded and also countered, only the remaining quantity (original line quantity minus the awarded quantity) appears on the new round. So if a line originally had a quantity of 100, and you awarded a quantity of 40 in round 1, round 2 has 60 as the line quantity.

 The new round is posted out to the invited bidders. The bidders receive a new invitation along with a new counter PDF version of the event. When a bidder bids on the new round, the bidder can view his or her initial bid and the countered offer.

Bidders can either withdraw, accept, or counter the counter offer either at the event level or for each line. If the bidder accepts, the system automatically creates a new bid response with the best response for each bid factor. If they counter, the new bid response is copied from the best response, but the bidder can override the values. If a bidder withdrawals, the bidder can't bid on any portion of the event from that point forward.

If Award to Previous Round is not selected on the Sourcing business unit page, the previous round/version is inactivated. The analyzer has the option to reject bids as part of a multiround process—either the entire bid or individual lines.

Once the bids are received on the counter, the analyzer can review the bids and choose to accept (award), reject, or counter. This process can continue indefinitely until the event is awarded or manually closed.

See Chapter 2, "Setting Up Business Units in PeopleSoft Strategic Sourcing," Defining Strategic Sourcing Business Units, page 16.

Price Components

When a new round is created, the best bids for each price component should become the new worst values for each price component. This means that if the original start price for materials was $60 and Bidder A bid $50 for materials, Bidder B bid $60, and Bidder C bid $55, then when a new round is created, the new start price for materials would be $50.

Line Groupings in Multiround Events

If a new round is created, then the system sets the worst values for the line group bid factors on the new round using the best responses from the bidders on the previous round. If a line group was partially awarded, the system sets the requested quantity on the new round to the previous rounds requested quantity minus the awarded quantity for the previous round.

Bidder Participation in Multiround Events

The Event Bid History page shows the event participation by round and not by version. Therefore, if the following bid situation occurred:

- Bidder A accepted on version 1 and posted a bid on version 2.

- Bidder B accepted on version 2 but never posted a bid.

- Bidder C declined on version 3 for round 1.

- Bidder D never responded to any of the event notifications.

The system displays the following on the Event Participation page for round 1:

- Total Event Invitations: 4

- Accepted Invitations: 2

- Declined Invitations: 1

- No Response: 1

Creating Multiversion Events

This section discusses how to create multiversion events.

Page Used to Create Multiversion Events

Page Name	Definition Name	Navigation	Usage
Event Workbench	AUC_MANAGE_EVENTS	Sourcing, Maintain Events, Event Workbench	Review a list of all created events and event details.

Creating Multiversion Events

Access the Event Workbench page.

To create a multiversion event, click the Create New Version button. All the details from the previous round or version are copied into the new version.

The system does not display the Edit Version button if you have selected the New Version Required option on the Sourcing Business Unit page.

Once you create and post a new version, the system inactivates the previous version and makes it read only. You can view the previous version on the Event Details page.

Creating Multiround Events

This section discusses how to:

• Create multiround events.

• Respond to counter bids.

• View multiround bid factor history.

Pages Used to Create Multiround Events

Page Name	Definition Name	Navigation	Usage
Analyze Total	AUC_AWARD_PG	Sourcing, Maintain Events, Analyze Events	Award the bid as a total event or a percentage of the event.
Multi-Round Bid Factor History	AUC_BFL_HIST_SEC	Click the View Bid History button on the Analyze Total page. This button appears only if the event includes multiple rounds.	View bid factor history for multiround events.

Creating Multiround Events

Access the Analyze Total page.

To create a multiround event:

1. Select the Counter action from the Bid Action option for every bid or line that you want to include in the next round.

   All the details from the previous round are copied into the new round. If you want to counter all lines on an event, you can select the Counter action on the Analyze Total page for the selected bidders. If you want to counter only selected lines from the event, you can select the Counter action on the Analyze Lines page for the selected lines and bidders.

2. Select Create New Round from the Go To menu.

3. The system opens the Event Details page in a new window, provides the existing event ID (including the event data), and increments the round number by 1.

   The bidders you countered are listed on the Invite Bidders page. The system also takes the best values from all of the countered bidders and these values become the default worst values for the next round. You must post the new round for it to be available for bidding, just like a new event.

   The bidder can select to accept, counter, or withdraw for each line or for the event in its entirety.

4. Click the View Bid History button on the Analyze Total page to view the bid history for multiple rounds using the Multi-Round Bid Factor History page.

   This button appears only if the event includes multiple rounds.

           Click to access the Multi-Round Bid Factor History page.

See Also

Responding to Counter Bids

Access the Event Details page (Manage Events and Place Bids, View Events and Place Bids).

Event Details page

When you create a new round, the system displays a new flag on the Event Details page, so that the event creator can indicate whether the counter offer is a binding offer. If the event creator keeps the default of deselected, the system displays *This is a Non-Binding Counter Bid* on the Create Bid Response page. If the event creator selects the check box, the system displays this message: *This is a Binding Counter Bid.*

Viewing Multiround Bid Factor History

Access the Multi-Round Bid Factor History page.

Multi-Round Bid Factor History

Bidder Name:	East Bay Office Supplies
Bid Factor Number:	1
Bid Factor Code:	BID_PRICE
Bid Factor Type:	Monetary
Comment Text:	What is your bid price?

Bid Factor History   Customize | Find | First ◄ 1-2 of 2 ► Last

Round	Bid#	Response	Ideal	Score	Weighting
1	1	1475	0	100.0000	40.00000
2	2	1450	0	100.0000	40.00000

Return

Multi-Round Bid Factor History page

Chapter 12

Managing Events

This chapter provides an overview of event management and discusses how to:

- Manage events.

- View bid history.

- View event document status.

- Use discussion forums.

- Generate Strategic Sourcing reports.

Understanding Event Management

Manage events through a single page. You can view the status of events and the approval workflow associated with an event to see how bidding is progressing, and then process the award of the event.

Once posted, a created event's bidding begins on the specific start time. The event progresses through most of the following statuses:

- *Open:* An event that has been saved but not posted or routed for collaboration.

- *Collaborating Event:* An event that has been routed for internal collaboration.

- *Pending Post Approval:* An event that is awaiting approval.

- *Pending Scheduled Review:* An event that is awaiting an approval process review.

  This status occurs when approval workflow is set to scheduled.

- *Posted:* An event that is approved; bidding is ongoing.

- *Event Completed:* An event that has ended but for which the update event status process has not been run yet.

- *Pending Award:* An event that is complete but that has not yet been awarded.

- *Collaborating Bid Analysis:* An event that has been routed for internal collaboration on the received bids.

- *Awarded:* An event that has been awarded and for which the status for all line items is *Closed.*

- *Not Awarded:* An event that ended without the event being awarded.

  The status for all line items was manually set to *Closed.*

- *Canceled:* An event that was canceled by the event creator.

For RFI events, the event statuses include:

- *Open:* A newly created, not yet approved, event.

- *Collaborating Event:* An event that has been routed for internal collaboration.

- *Pending Post Approval:* An event that is posted for internal approval.

- *Posted:* An approved event with bidding that's ongoing.

- *Posted/Event Ended:* A completed and approved event that has not yet been reviewed.

- *Pending RFI Review:* A completed event that is awaiting review.

- *Collaborating Bid Analysis:* An event that has been routed for bid analysis collaboration.

- *RFI Reviewed:* An event for which RFI responses have been reviewed.

- *Canceled:* An event that was canceled by the event creator.

Event Details

While the event is posted, you can invite new bidders and edit these details of the event:

- Header comments and attachments.

- Line comments and attachments.

- Event extensions.

- Reserve price.

Status Update at Event End Date

The Update Event Status Application Engine process (AEAUCSTATCK) updates the status of an event from *Posted* to *Pending Award* (for auction and RFx events) or *Pending RFI Review* (for RFI events). You can schedule this process to run every five minutes; it checks to determine whether an event's end date has arrived. If it has, the event status is updated to *Pending Award* or *Pending RFI Review.*

This process is also used to notify event creators when the collaboration due date has passed and when an event has ended and is pending award.

RFI Events

You can maintain RFI events using the Event Workbench. You can search for events by the RFI event format, or the RFx event type. You also view the RFI cycle for RFI events on the Event History page.

Multiversion or Multiround Events

You can use the Event Workbench to create and edit versions of multiversion events. When you are viewing a multiversion event in the Event Workbench, the system always displays the most recent version of the event.

See Also

Chapter 12, "Managing Events," page 215

Auction Pause

If a bidder makes an error when posting a bid on an auction event or needs clarification on the auction event, the event creator can pause the event to either remove the erroneous bid or address the clarification.

You can pause an event any time while it is open for bidding. When an event is paused, the event creator can make changes to an event or elect to disallow a bid. Bidders can view a paused event and save a bid, but can't post a bid. Internal users can still enter bids on behalf of a bidder while an event is paused. If an auction is paused, the system notifies the invited bidders. The system notifies the bidders that bidding has resumed when the event is restarted.

Managing Events

This section discusses how to:

- List events.

- Pause and resume an event.

- Cancel an event.

- View event history.

See Also

Chapter 15, "Analyzing Bids and Awarding Events," page 283

Pages Used to Manage Events

Page Name	Definition Name	Navigation	Usage
Event Workbench	AUC_MANAGE_EVENTS	Sourcing, Maintain Events, Event Workbench	Review a list of all created events and event details. Use this page to: • Search and sort events. • View event details by clicking the Event ID link. • Display details of the line items for an event by clicking the arrow at the left of the event row.
Event Details	AUC_CREATE_PG	Click the specific event ID on the Event History or Event Workbench page. ✎ Click the Edit Current Version button on the Event Workbench page. ▢ Click the Create New Version button on the Event Workbench page. 👥 Click the View Collaboration button on the Event Workbench page.	Edit details of the event, create a new version of the event, edit a current version of the event, or view changes from collaborators.
Pause Auction/Resume Event	AUC_PAUSE_EVENT	• ⏸ Click the Pause button on the Event Workbench page. • ▶ Click the Resume Auction button on the Event Workbench page.	Enable an auction to be paused. Indicate that an auction is paused, and restart it.
Cancel Event	AUC_MGR_CANCEL	✖ Click the Cancel button on the Event Workbench page.	Cancel the event.

Page Name	Definition Name	Navigation	Usage
Event History	AUC_EVENT_HISTORY	• Sourcing, Maintain Events, Event History • 📖 Click the Event History button on the Event Workbench.	View the different event stages, the version/round history of the event, and link event lots.
Chat History	AUC_CHAT_LOG	🖥 Click the Chat History button on the Event History page.	View the chat log for an event.
Default Search Preferences	AUC_MNGEVNTS_PREF	Click the Default Search Preferences link on the Event Workbench page	Set preferences for searching events.
Event Approval Status	AUC_WF_APPR_INQRY	✅ Click the Event Approval button on the Event Workbench page.	Review the status of the event in the approval process.
Event Bid History	AUC_BID_HIST_INV	📇 Click the View Bid History button on the Event Workbench page.	View the bid invitation status and bidding history for the specified event.

Listing Events

Access the Event Workbench page (Sourcing, Maintain Events, Event Workbench).

Event Workbench page

Only Show Events I Created	Select to show only user-created events.
Only Show Active Events	Select to show only active events. When this option is selected, events with a status of *Awarded, Not Awarded,* or *Cancelled* are not displayed in the search results.
	To search for completed events, deselect the Only Show Active Events option and select *Posted* in the Event Status drop-down menu.
Associated with Plan	Select a sourcing plan to be included in the search criteria.
Plan Name	Select the name of the sourcing plan.

If available, the buttons appear to the right of each event. Availability depends on the event's status:

	Pauses the auction event so that the event creator can make changes while the event is happening. The system displays this button only for auction events with the status of *Posted*.
	Resumes a paused auction event so that bidders can continue bidding on the event. The system displays this button only when an auction event is paused.

	Enables users to cancel a sourcing event. The system hides this button for events with the status of *Awarded, Not Awarded,* or *Cancelled.* You also can't cancel an event if the event has been partially awarded.
	Enables the user to view the event stages, version and round history, chat logs, and event lots. This button is available for all events, regardless of status.
	Indicates that the Analyze Events page is available for all events with the following statuses: Event Completed, Pending Award, Pending RFI Review, Awarded, RFI Reviewed, and Not Awarded.
	This button is available for all posted events, except those for sealed RFx events—in which case the Analyze Events page is not available until the event has ended (and in a *Pending Award* status).
	Click to edit the version of the selected event on the Event Details page. If the New Event Version Required option is selected for the Sourcing business unit, the edit version button doesn't appear for any events associated with that business unit. This button is also not available for awarded events.
	Click to create a new version of the selected event on the Event Details page. This button is not available for awarded events or events that are checked out by a collaborator.
	Click to view collaboration input for the selected event.
	Click to check out the event and add comments as a collaborator.
	Indicates that the event is checked out by a collaborator to enter collaboration input. The name of the person who has checked out the event appears when you move your cursor over this button.
	Click to view the invitation and bid history for the selected event.

Pausing and Resuming an Auction

Access the Event Workbench page (Sourcing, Maintain Events, Event Workbench).

Note. You can pause only auction events, not RFx nor RFI events.

To pause an auction:

1. Navigate to the Event Workbench page and select the auction to pause.

    You can pause only those auctions that have been posted and have not ended.

2. Click the Pause button.

    The system takes you to the Pause Event page.

3. Click the Pause Event button on the Pause Event page to confirm that you want the event paused.

    The page title changes to Resume Event, and the Resume button appears.

    If the value in the End Date/Time field has passed, when you are resuming the event the system alerts the event creator and indicates how to extend the end date and time.

Reason Code	Select a reason code that describes why you paused the event.
Email Comments to Bidders	Select to indicate that the reason code comments should be sent to bidders when they are notified that the event is paused. The system provides the comments as a default from the selected reason code, but you can modify them.
Resume	Click to restart the event. The system notifies the bidders when the event is paused and resumed. If the Email Comments to Bidders check box is selected, the system sends the comments along with the email notification.

See Also

Chapter 3, "Preparing to Implement PeopleSoft Strategic Sourcing," Setting Up Reason Codes, page 42

Canceling an Event

Click the Cancel Event button to cancel an event.

Note. You can't cancel events that are partially awarded or that have a status of *Awarded, Not Awarded,* or *Cancelled.*

When you verify the cancellation request on the Cancel event page:

*   If the event has been posted, an email notification is generated to the invited bidders, notifying them that the event is canceled.

*   The event status is updated to *Canceled.*

*   If the event was previously posted to a third-party system, a cancellation message is sent to the third-party system.

Using the Event History

Access the Event History page (Sourcing, Maintain Events, Event History).

Event History

Event Information

Bus. Unit	Event ID	Event Name	Event Format	Event Type	Status
US002	0000000040	Bicycle Child Seat Auction	Buy	Auction	Pending Post Approval

Version History   Customize | Find | View All | 🗗   First ◄ 1 of 1 ► Last

Round	Version	Event Status	Modified By		
1	1	Pending Post Approval	Theresa Monroe	🔍	🖼

Event Stage

Create Event	Event Approval	Dispatch Event	Receive Bids	Analyze Bids	Award Event

Event History page

👤	Click the Chat History button to view the chat log associated with the event.
🖼	Click to access discussion forums.

As the event enters each stage in the cycle, the representative button is highlighted. If an event's status is *Cancelled,* none of these buttons are highlighted.

	Because this is the first step in the event life cycle, the Create Event button is highlighted for all events. Click this button to access the Create Event page for that event.
	The Event Approval button is highlighted for any event that is in, or has gone through, an internal event approval process. Click this button to access the Event Approval Status page.
	The Dispatch Event button is highlighted for any event that has been dispatched to the bidders. This button does not link you to any other pages.
	The Receive Bids button is highlighted for any event that either is or was available for bidding. Click to access a page where you can enter bids that you have received by fax, standard mail, or email.
	The RFI Responses button is highlighted for any RFI event that has begun. This button is available only if the event type is RFI. Click to access a page where you can view responses to the selected RFI.
	The RFI Reviewed button is highlighted for any RFI event for which the RFI has been reviewed. This button is available only if the event type is RFI. Click to access a page where you can access the RFI review.

	The Analyze Bids button, which you click to access the Analyze Bids page, is highlighted when you can analyze:
	Any event that has ended.
	Any event that is not sealed and has started.
	An RFx event that is sealed and has ended.
	The Award Event button is highlighted when you can determine how to award the event; that is, it is highlighted when the end date is reached. Click to access the Award Details page.

Viewing the Bid History

The Bid History page is available to event creators for RFx and Auction events. You can allow bidders to view the bid history only for auction events. Bidders will not have access to the Event Invitation page, nor will they have access to the real-time price and score charts. You can select to display competitor bids to a bidder for auction events by setting the Competitor Bids field on the Event Settings and Options page to *Display and Show Identity* or *Display and Hide Identity.* If you select to show identity, then bidders can see the names of the other bidders who bid on the auction event. If you select to hide identity, then bidders can view the bids, but not the identity, of the other bids on the event.

If bidders are allowed to submit proxy bids, event creators never see the bidder's proxy price on the bid history pages and price graphs, but see the bidders *current bid price.* Likewise, if bidders can view competitor bids, they never see the actual proxy price entered by the other bidders. They are allowed to see only the bidder's current bid price.

Note. The available Status/Ranking options for *bidders* to select, such as Rank, Price, Score, and Status on the Bid History page, are controlled based on the settings on the Event Settings and Options page.

If bidders compete on the basis of price, and the Competitor Bids display option is selected for the event, bidders can view the bid prices associated with the other bidders. If bidders compete based on score, and the Competitor Bids display option is selected for the event, bidders can view the bid scores associated with the other bidders. If the event is ranked, bidders can view bids by rank. Bidders always have access to view by bid status if competitor bids are displayed.

Pages Used to View Bid History

Page Name	*Definition Name*	*Navigation*	*Usage*
Event Workbench	AUC_MANAGE_EVENTS	Sourcing, Maintain Events, Event Workbench	Review a list of all created events and event details.
Event Bid History	AUC_BID_HIST_INV	Click the View Bid History button on the Event Workbench page.	View the bid invitation status and bidding history for the specified event.

Viewing by Best Bids

Access the Event Bid History page (click the View Bid History button on the Event Workbench page).

You can view by best bids only if the Bids Compete At: Line Level option is selected on the Event Settings and Options page. If you chose to rank the event, the system displays the rank. If bidders are competing based on price, the system displays the total event bid price for each bidder. If not, the system displays the total event bid score for each bidder. If the bidder has the total winning price/score, the system indicates that the bid status is *Winning;* otherwise, the system displays *Outbid.* When you access this page using the Best Bids report type, the price chart and score chart are based on the total event bid price/score. You can view the price/score for each line item when using the List by Line report type.

Event Bid History page

View Charts

The Event Price Chart shows a real-time line graph of the bidding activity on an auction event. The system automatically refreshes the chart every 5 seconds to display the latest bids. The x-axis represents the bidders and the y-axis represents the bid price.

The Event Score Chart displays a real-time bar graph representing each bidder's score. The x-axis represents the bidders, and the y-axis represents the bidder's score.

Event Bid History graphs (1 of 2)

Event Bid History graphs (2 of 2)

Display Charts for Event Line   Select an event line from the drop-down list box to view charts for the event line.

Viewing by Bidder or Bid

You can view the bids posted by each bidder using the Bidder/Bid Report Type. You can sort by bid ID, date, name, or score. All of each bidder's posted bids appear, but only the best bid for each bidder displays the rank or score. The price and score appear for all bids. You can also disallow a bid on an auction event from this page. This may be necessary if a bidder posts an erroneous bid. The Disallow Bid option is available only to internal users—bidders cannot disallow their own or another bidder's bid. If you don't select Bids Compete At: Event Level on the Event Settings and Options page, the system displays only the score, price, rank, and status at the line level, not at the overall bid level. If you selected Bids Compete At: Event Level on the Event Settings and Options page, the bid price, score, rank and status appear for the overall bid.

If bidders have access to view competitor bids, they can use this page to view the bids entered by each bidder. Bidders can also select the Display My Bids Only check box to display only their own bids. This option is not available to internal users.

Event Bid History page – viewing by bidders and bids

Viewing List by Line

The system displays all bids entered for each line. If you have selected to display the start price to bidders on the Event Settings and Options page, the system displays the start price.

Score View

Access the Event Bid History page (click the View Bid History button on the Event Workbench page).

Event Bid History page - viewing by line

If you select List By Line and the Score status ranking, you can view the score for each line.

Rank View

If you select List by Line and the Rank status ranking, you can view the score for each bidder's best line bid as a ranking.

Bid Status View

If you select List by Line and the Bid Status status ranking, you can view each bidder's best line bid by the bid status.

Price View

If you selectList by Lineand the Price status ranking, you can view the price for each bidder's best line bid.

 You can view the price of all bids based on the bidder's best bid if you selected *Bid Required on All Lines* on the Header Details page.

Bidder Participation in Multiround Events

The Event Bid History page displays the event participation by round and not by version. Therefore, if the following bid situation occurred:

• Bidder A accepted on version 1 and posted a bid on version 2.

• Bidder B accepted on version 2 but never posted a bid.

• Bidder C declined on version 3 for round 1.

• Bidder D never responded to any of the event notifications.

The system displays the following event participation on the Event Participation page for round 1:

*   Invited Bidders: 4

*   Participating Bidders: 2

*   Declined Bidders: 1

*   No Response: 1

See Also

Using the Sourcing Document Status Inquiry

This section discusses how to use Sourcing Document Status Inquiry.

Page Used to Inquire on Document Status

Page Name	Definition Name	Navigation	Usage
Sourcing Document Status Inquiry	AUC_DOC_STATUS	• Sourcing, Maintain Events, Event Document Status • Click the Document Status Inquiry link from the Go To options on the pages in the Create Events and Analyze Events components.	View the status of documents associated with sourcing events.

Using the Sourcing Document Status Inquiry

Access the Sourcing Document Status Inquiry page (Sourcing, Maintain Events, Event Document Status).

If requisitions, purchase orders, or contracts are associated with an event, you can view them on the Sourcing Document Status Inquiry page.

If requisitions were consolidated into an event, the Document Status Inquiry page lists each requisition. Then once you award an event, the inquiry shows the related contract, purchase order, or multiple purchase orders (if the award is for an event derived from multiple requisitions). This information is available only for buy events.

See Also

Using Discussion Forums

This section discusses how to use discussion forums.

Pages Used to Access Discussion Forums

Page Name	Definition Name	Navigation	Usage
Discussion Forums	AUC_MESSAGE_ENTRY	• Sourcing, Maintain Events, Event History. Click the Discussion Forums button on the Event History page. • Sourcing, Maintain Events, Discussion Forums	Access discussion forums for the selected event.
Forum User Preferences	AUC_FORUM_PREF	Click the Forum User Preferences link on the Discussion Forums page.	Add user preferences.
Discussion Forums	AUC_MESSAGE_LIST	Click the Event Discussion link on the Discussion Forums page.	Lists all active forums that you can access.
Event Discussion	AUC_MSG_REPLY_SEC	Click an event forum topic on the Event Discussion page.	View an event message and post a reply.

Using Discussion Forums

Access the Event Discussion page (Sourcing, Maintain Events, Discussion Forums).

Event Discussion page

Click a linked event to access the discussion forum for that event.

Event Discussion - Event Forum Topic

Click an event forum topic to view an event message.

Event Discussion - Message page

After viewing the message, click the Reply button to post a message to the event forum for this topic.

Event Discussion - Reply page

Click the Submit button to add the message to the discussion forum.

Private Message   Select to mark the message private so that only you and the person to whom you are replying can see the message. This option is available only for event creators. Bidders can send only private messages, and replies to bidders are also private only.

Note. Internal users can see all messages, so use this check box to communicate privately with the event buyer/seller without other bidders being involved.

Generating Strategic Sourcing Reports

This section discusses how to:

- Generate Cycle Time Analysis reports.

- Select event statuses.

- Generate Auction Summary reports.

Pages Used to Generate Strategic Sourcing Event Reports

Page Name	Definition Name	Navigation	Usage
Cycle Time Reporting	AUC_CYCL_TM_RPT	Sourcing, Reports, Cycle Time Analysis	Generate the Cycle Time Analysis (AUCCYCLE) report that includes the time calculations between key activities within the sourcing event life cycle.
Select Event Status	AUC_SEL_EVT_STS	Click the Select link on the Cycle Time Analysis page.	Select the specific event statuses to be included in the Cycle Time Analysis report.
Auction Summary Report	AUC_SUMMARY_RPT	Sourcing, Reports, Auction Summary	Generate the Auction Summary (AUCSUMM) report, which contains changes in price, total cost, and score across bids for each bidder associated with auction events.

Generating Cycle Time Analysis Reports

Access the Cycle Time Reporting page (Sourcing, Reports, Cycle Time Analysis).

Cycle Time Reporting page

Report Request Parameters

Business Unit	Select a range of business units for the report.
Department and **Entered By**	Select values for these fields.

Select to include events with the following statuses

Only Awarded Events or **Specify Event Status(es)**	Select one of these options. If you select Specify Event Status, the Select link appears.

See Chapter 12, "Managing Events," Selecting Event Statuses, page 235.

Select to include events with the following event create dates

All Dates or **Specify Date Range**	Select one of these options.
From Date/Time and **Thru Date/Time**	If you select All Dates, these fields are unavailable. If you select Specify Date Range, enter specific dates and times for event create dates to be included in the report.

Select to include events with the following categories

All Categories and **Specify Categories**	Select one of these options. If you select Specify Categories, select an item or asset and a category code.

Selecting Event Statuses

Access the Select Event Status page (click the Select link on the Cycle Time Analysis page).

Select one or more of these statuses to be printed on the report:

- Awarded

- Open

- Posted

- Paused

- Pending Post Approval

- Pending Award

- Inactive Version

Generating Auction Summary Reports

Access the Auction Summary Report page (Sourcing, Reports, Auction Summary).

Auction Summary Report page

Auction Format	Select the type of auctions you want included in the report. Values are *Both, Buy,* and *Sell.*
Business Unit	Select a range of business units for the report.
Department	(Optional) Select the department to further define the search criteria.
Entered By	(Optional) Select the name of the event creator.

Select to include events with the following event create dates

Event ID, Round, and **Line**	Select values for these fields to be included in the report.

Chapter 13

Registering and Maintaining Bidders

This chapter provides an overview of bidders and the registration homepage and discusses how to:

- Register to place a bid.

- Sign in to PeopleSoft Strategic Sourcing.

- Reset passwords.

- Maintain bidder information.

Understanding Bidders

Bidders must register, create their profile, and review terms and conditions before submitting bids.

There are two main groups bidding on events:

- Bidders you invite to view an event or who choose to view a public event; that is, people and organizations with whom you have not done business before.

  These users must become registered bidders before they can bid on any event.

- Vendors and customers; that is, people and organizations with whom you do business now.

  These people are not only registered bidders, they have advanced to the status of vendor or customer.

PeopleSoft Strategic Sourcing enables you to provide bidders with a simple registration process. For users who do not already exist in the database, the registration process collects pertinent information about them such as name, email, address, and organization information if they represent one. Registering enables them to create a user ID and password, and assigns them the role of Event Bidder. Now, the user is valid in the system and can see and bid on both public events and events to which you have invited him or her.

When bidders register, they inherit the roles assigned to a default bidder. You define a default bidder user ID on the User Profiles - Roles page and assign that user ID to the default bidder ID on the Bidder Registration Setup page.

Bidders are stored separately from vendors and customers. The recipient must be either a vendor or a customer before an event can be awarded. Because, by definition, a bidder has not yet sold to or bought from your business, the bidder tables act as a holding place until the bidder is awarded an event. Once an event is awarded to a registered bidder, PeopleSoft Strategic Sourcing updates their user ID to the correct type: vendor or customer. You would search under vendor or customer to invite this bidder to future events.

For those vendors and customers who did not start out as bidders, add the role of either Event Vendor or Event Customer to their user profile. Vendors who did not start out as bidders can answer bidder profile questions by accessing their Sourcing Profile page (Manage Events and Place Bids, My Sourcing Profile) to complete their bidder registration.

Vendors and customers can manually activate their categorizations, instant messaging settings, and user contact mappings.

If a bidder has the same standard ID (such as tax ID) or VAT ID as an existing vendor, customer, or bidder, the system transfers the bidder to a page to resolve the issue. On that page, the system displays a summary of the duplicates, what company they relate to, and some options for resolving them.

All customers' user IDs must be of the type *Customer* (as opposed to *Customer Contact),* so that they can view events to which they have been invited.

Note. All pages discussed in this chapter are supplier facing.

Bidder Registration Approvals

If approvals are required for bidder registrations, the bidder is informed after registering that their registration is pending approval. The approval request is then submitted to the user with the Event Administrator role. The Event Administrator can either approve or reject the registration request. If approved, the bidder receives an email with his or her user ID and assigned password. If rejected, the Event Administrator selects a reason for rejecting the registration, and bidders receive an email indicating that their request was rejected, and optionally the reason why it was rejected.

Bidder registration approval is activated on the Registration homepage.

See Chapter 3, "Preparing to Implement PeopleSoft Strategic Sourcing," Setting Up the Registration Homepage, page 35.

See Also

PeopleTools PeopleBook: Security Administration

Understanding the Registration Homepage

PeopleSoft Strategic Sourcing enables you to send email notifications to potential bidders, inviting them to bid on events. In the email, you can provide a link to the homepage, where you give information about the event and about how to register as a valid bidder.

Registering to Place a Bid

This section provides an overview of bidder registration and discusses how to register to place a bid.

Understanding Bidder Registration

To register, a guest to the site completes and submits the information on the Bidder Registration page and agrees to the terms and conditions.

Once submitted, PeopleSoft Strategic Sourcing assigns the registrant a user ID and the appropriate bidder roles for events. The system then sends a registration confirmation email to the bidder.

The information on the bidder registration pages is based on choices made on the Bidder Registration setup page.

See Also

Pages Used to Register a Bidder

Page Name	Definition Name	Navigation	Usage
Bidder Registration - Preliminary Information	AUC_REGISTER_PG1	Manage Events and Place Bids, Register Bidder	Enter preferred bidder and event types while registering to bid.
Bidder Registration - User Account Setup	AUC_REGISTER_PG2A	Click Next on the Bidder Registration - Preliminary Information page.	Enter user and contact information for bidding.
Bidder Registration - Primary Address	AUC_REGISTER_PG3A	Click Next on the Bidder Registration - User Account Setup page.	Use to enter addresses.
Bidder Registration - Other Account Addresses	AUC_REGISTER_PG3B	Click Next on the Bidder Registration - Primary Address page.	Create bill to, ship to, and invoice addresses.
Bidder Registration - Address Contacts	AUC_REGISTER_PG3C	Click Next on the Bidder Registration - Other Account Addresses page.	Associate contacts to addresses.
Bidder Registration - Additional Classification Information	AUC_REGISTER_PG4	Click Next on the Bidder Registration - Address Contacts page.	Enter tax identification numbers, SIC codes, VAT information and profile questions.

Page Name	Definition Name	Navigation	Usage
Duplicate Information Found	AUC_DUP_ENT_PG	Enter a standard ID or VAT ID that duplicates an existing customer, vendor, or bidder.	Resolve or correct duplicate ID information.
Bidder Registration - Categorization Information	AUC_REGISTER_PG6A	Click Next on the Bidder Registration - Additional Classification Information page.	Enter the buy and sell sourcing categories to which events the bidder would like to be invited.
Bidder Registration - Terms and Conditions	AUC_REGISTER_PG6	Click Next on Bidder Registration - Categorization Information page.	Click that the bidder agrees with the terms and conditions on the Web site.

Registering to Place a Bid

To register to bid, click the Register as a Sourcing Bidder link on the Bidder Login page.

Bidder Login pagelet

 Start with the Bidder Registration - Preliminary Information page, and click Next to follow the pages through the component.

You set up some of the information on the Bidder Registration component on the Bidder Registration Setup Homepage.

See Chapter 3, "Preparing to Implement PeopleSoft Strategic Sourcing," Setting Up the Registration Homepage, page 35.

User Account Setup

Access the Bidder Registration - User Account Setup page.

Bidder Registration - User Account Setup page

Delete User Account   Click to delete a user account row.

IM Service (instant messaging service)   Enter the instant messaging system for the contact. Options include AOL and Yahoo.

IM User Name   Enter the instant messaging user name for the contact.

Time Zone   Enter the default time zone for the contact.

Currency Code   Enter the default currency to use for the contact.

Address Information

Access the Bidder Registration - Other Account Addresses page.

Bill to Address, Ship To Address, and **Invoice Address**   Select a check box for each additional address that you need to add. If you select a check box, address entry fields for the additional addresses appear.

Business Classification Information

Access the Bidder Registration - Additional Classification Information page.

Bidder Registration

Step 6 of 8: Additional Classification Information

Please fill out the following information. This information allows us to more accurately tailor the Sourcing process with your business.

* Required Field

Standard ID Numbers		Customize | ⤢ First
Identification Type	**ID Number**	
1	*Tax Identification Number	

SIC Codes - US - NAICS Codes	Customize | Find | ⤢ | ▦ First ◀ 1 of 1 ▶ Last
Standard Industry Code	**Description**		
🔍			Delete

Add Row

1. When were you incorporated? [   ] 📅

2. What is your annual revenue? [   ]

VAT Information				Customize | ⤢ First
Country	**Description**	**VAT ID**	**Home Country**	
1 🔍			☐	Delete

Add Row

More About Your Organization (Optional)

HUBZone Program:
[▼]

Sm Disadvantaged Business Prog:
[▼]

Size of Small Business:
[▼]

Other Preference Programs:
[▼]

Veteran-Owned Small Business:
[▼]

☐ Women-Owned Business

☐ Emerging Small Business

Bidder Registration - Additional Classification Information page

Standard ID	Any of 14 standard IDs set on the registration homepage.
	Warning! If the entered standard ID or VAT ID matches the ID of an existing vendor, customer, or bidder, the system takes you to the Duplicate ID Found page to resolve the issue.

SIC Codes (Standard Industry Code codes)	Bidders enter standard industry codes related to their business.

The bidder enters answers to any profile questions. For example, you may have to indicate how many years your company has been in business. If the profile questions are required, the bidder must answer to successfully register.

See Chapter 3, "Preparing to Implement PeopleSoft Strategic Sourcing," Setting Up the Registration Homepage, page 35.

Categorization Information

Access the Bidder Registration - Categorization Information page.

Bidder Registration - Categorization Information page

Bidders select categories of types of events to which they'd like to receive invitations.

Bidders see buy or sell events depending on what event type was selected on the Bidder Registration - Preliminary Information page.

See Chapter 3, "Preparing to Implement PeopleSoft Strategic Sourcing," Setting Up Bidder Categorization Trees, page 32.

Signing In to PeopleSoft Strategic Sourcing

This section provides an overview of signing in to PeopleSoft Strategic Sourcing.

Understanding Signing In to PeopleSoft Strategic Sourcing

Anyone, such as guests, registered bidders, and vendors and customers, can enter PeopleSoft Strategic Sourcing as guests; that is, they do not need to enter a logon name or password to browse public events. However, they must log in or register if they have not previously done so, to:

• View nonpublic events to which they have been invited.

• Bid on any event.

After logging in, the system displays customized My Sell Events,My Buy Events, and My Event Discussions pagelets for registered bidders.

See Also

Resetting Passwords

This section discusses how to reset passwords.

Page Used to Reset Passwords

Page Name	Definition Name	Navigation	Usage
Reset and Send Forgotten Password	AUC_RESET_PASS_PG	Click the I forgot my password link on the Bidder Login pagelet.	Reset a password and receive an email with a new password.

Resetting Passwords

Access the Reset and Send Forgotten Password page.

For bidders that remember their user ID but can't remember their password, enter the user ID on the Reset and Send Forgotten Password page. The system resets the password and sends the new password to the user.

Maintaining Bidder Information

This section discuss how to maintain vendor and customer registration.

Pages Used to Maintain Bidder Information

Page Name	Definition Name	Navigation	Usage
Maintain Sourcing Contact Information	AUC_USER_CONTACTPG	Manage Events and Place Bids, Maintain My User Contact	Bidders enter their contact information for their company, and indicate the preferred contact.
Main	AUC_BIDDER_MAIN_PG	Manage Events and Place Bids, My Bidder Profile	Enter and maintain general bidder information, including bidder type, status, and minority business information. **Note.** Only bidders can access bidder profiles, not vendors and customers.
Addresses	AUC_BIDDER_ADDR_PG	Manage Events and Place Bids, My Bidder Profile	Enter and maintain bidder addresses, including the main address, bill to address, ship to address, and invoice address.
Contacts	AUC_BIDDER_CONT_PG	Manage Events and Place Bids, My Bidder Profile	Enter and maintain bidder contacts.
Identifications	AUC_BIDDER_IDS_PG	Manage Events and Place Bids, My Bidder Profile	Enter and maintain bidder ID numbers such as tax identification number, SIC codes, VAT information, and any profile questions.
Strategic Sourcing Tree	AUC_SELF_CAT_PG	Manage Events and Place Bids, My Categorizations	Bidders can view or change their self-categorizations to indicate the types of events for which they want to receive invitations.
Maintain Instant Messaging Settings	AUC_BIDDER_IM_PG	Manage Events and Place Bids, My IM Settings	Bidders enter their instant messaging user name and service.
Maintain Sourcing Contact Information	AUC_USER_CONTACTPG	Manage Events and Place Bids, Maintain My User Contact	Use to associate a company contact with the vendor user ID.
Terms and Conditions	AUC_VIEW_TERMS	View Terms & Conditions	View terms and conditions after registering to bid.

Page Name	Definition Name	Navigation	Usage
Sourcing Profile	AUC_VENDOR_IDS_PG	Manage Events and Place Bids, My Sourcing Profile, Sourcing Profile	Vendors who did not start out as bidders provide responses to profile questions.

Maintaining Vendor and Customer Registration

Existing vendors and customers can add additional registration settings. This is necessary to use chat and to receive event invitations geared towards their interests. Existing vendors can also provide responses to optional profile questions that are part of the bidder registration.

To maintain vendor and customer registration:

1. Access the Categorization page.

   Select desired categories.

2. Access the Maintain Sourcing contact page.

   Add contacts.

3. Access the IM Settings page.

   Update IM settings.

4. Associate vendor user IDs with vendor contact names on the Maintain Sourcing Contact Information page.

Adding Vendor Profile Information

Access the Sourcing Profile page (Manage Events and Place Bids, My Sourcing Profile, Sourcing Profile).

Sourcing Profile page

Vendors converting to bidders can provide profile information on their Sourcing Profile page, whereas bidders converting to vendors add or modify profile information in the My Bidder Profile component.

Chapter 14

Placing and Managing Bids

This chapter provides an overview of bidding and discusses how to:

* Use PeopleSoft Strategic Sourcing pagelets.

* Place bids.

* Create bidder responses.

* Review bids.

Understanding Bidding

When the created event is posted, bidders receive notification of the event. They can browse events based on various search and sort criteria, place bids based on the parameters that you have set for the event, and receive notifications about the status of the event. For bidders who enter their bids using fax or mail, you can enter the faxed or mailed bids online for them.

PeopleSoft Strategic Sourcing enforces the event rules that you set and maintains a bid history audit trail.

When a bidder posts a bid, PeopleSoft Strategic Sourcing:

* Verifies that the event end date has not passed.

* Saves any changes that the bidder has made, if a previous bid is being updated.

* Verifies that bid responses have been entered for each required bid factor.

Depending on the situation, other edits can occur when a bid is posted. Here are some of the possible scenarios and how posting is affected.

Auction Event

The system verifies that the posting is the best bid received so far:

* If the bid currency is not the same as the event currency, it converts the bid price to the event currency to determine whether the bid is a winning bid.

* If the bid does not score higher than the current winning bid, it lists the bid's score compared to the winning score on the Create Bid Response page.

  The bidder can choose to post a bid that does not beat the current winning bid or revise the bid to obtain a higher score.

- If the bid scores higher than the current winning bid, it generates an email notification to the previous high bidder with information that the previous bidder has been outbid.

Auction event options depend on the combination of several different settings on the Business Unit Definition page (Set Up Financials/Supply Chain, Business Unit Related, Sourcing).

- If the On the Basis Of option is set to *Price,* then the bidder is competing based solely on price, not on score.

- If the On the Basis Of option is set to *Score,* then the bidder is competing based on score.

- If Bids Compete At option is set to *Event Level,* then the bidder is competing based on total event price or total event score.

- If Bids Compete Atoption is set to *Line Level,* then the bidder is competing based on each line's unit bid price or line score.

- If the Bidders Must Beat option is set to *Winning Bid,* then the bidder must always beat either the current total winning bid (which again is determined as either the total event winning price or total event winning score) or each line's winning bid (unit bid price or winning line score) for the lines upon which the bidder bids.

- If the Bidders Must Beat option is set to *Own Bid,* then the bidder must always beat either his or her own previous total bid price or score or his or her last unit bid price or line score depending on what the Bids Compete At and On The Basis Of fields are set to.

  The bidder is not alerted if his or her bid does not score higher. Instead, depending on the options on the Event Settings and Options page, the bidder can see either the winning score on the create response so that the bidder can know whether his or her bid beats the winning bid. If the winning bid does not appear to the user, then the bidder can see his or her rank or bid status after bid posting.

- If Display Winning Bid to Bidders is not selected, bidders can see only their bid statuses (winning or outbid) or bid rank, depending on whether displaying the bid rank has been selected.

  Bidders cannot see the winning bid.

See Chapter 9, "Creating Events," Specifying Event Settings and Options, page 140.

Event Extension Is Enabled

The system checks to see whether the posted bid is within the last bid received time frame and what number of extensions are set on the event:

- If the posted bid date is not within the last bid received time frame, the event end date is not updated.

- If the posted bid time is within the last bid received time frame and the number of extensions has not already been allocated, the event end date is extended based on the parameters set on the event.

- If the posted bid time is within the last bid received time frame, but the number of extensions has already been allocated, the end date is not updated.

- If the event has events lots associated with it, the Preview, Start, and End Date fields are updated for all subsequent event lots when an event extension is triggered.

Event Is a Sealed RFx

The calculated score is not visible to the bidder.

The event originator cannot view either bids or bid history until the event end date is reached.

Event Is an RFx But Not a Sealed Bid

The calculated score is not visible to the bidder.

The event originator can view the bid once it is posted.

RFI Events

When you bid on RFI events, you respond only to header bid factors; there are no line bid factors.

If the RFI is being scored, the calculated score is not visible to the bidder.

Bidding Using Automatic Proxy Bids

Bidders can submit bids for auction events by using the automatic proxy bidding feature. A proxy bid is a bid where the bidder preestablishes the best price for which he or she would supply or purchase the goods or services. Then the system makes bids automatically—as needed to take the lead—to the preset best offer. Thus, the bider gets the best possible deal while still winning the auction. In addition, the system emails the bidder if the best offer becomes outbid. This frees the bidder from having to monitor the auction "in-person" for its duration.

There are a few rules to keep in mind when using automatic proxy bidding:

- You can use proxy bidding on auction-only events.

- Bids compete at the line level based on price.

- The winning bid must be displayed to bidders and bidders must beat the winning bid. You cannot display a bidder's ranking for proxy events.

    Bidders who are currently winning on a line may enter a new proxy bid price for the same line. This price overrides the previous proxy price.

    For example, if Bidder A had a proxy price of $45 on line 1 with a current bid price of $60, Bidder A could copy in the previous bid and change his or her proxy bid price to $50. Subsequently, $50 would be the new proxy price for Bidder A, not $45. Bidders are allowed to have only an "active" proxy price even if the bidder has multiple bids.

To enable automatic proxy bidding, event creators can:

- Select *Auction* as an event format on the Event Details (add) page (Sourcing, Create Events, Event Details).

    - Select *Enabled* in the Proxy Bidding (Auctions Only) field on the Create Events page (Sourcing, Create Events, Event Details).

    - Click Add.

- Select *Enabled* in the Proxy Bidding field on the Event Settings and Options page (Sourcing, Create Events, Event Details, Event Summary).

Bidding on Behalf of Another Bidder

Internal users can save, post, and edit bids that they have entered on behalf of another bidder. They can also upload XML bids on behalf of other bidders.

Vendor Bidding

You can optionally register an existing vendor and allow the vendor to bid online. The vendor must be approved before posting the award.

Bidder Price Breaks

If bidding on an event that includes user-defined price breaks, bidders enter their bid prices based on the predefined tiers. Otherwise, if the event specifies bidder-defined price breaks, the bidders can define their own price tiers. When entering the price tier response, bidders indicate whether the tier pricing is adjusted based on a flat-dollar amount or based on a specified percentage. Alternately, the bidder can just enter the unit price for each tier and the system will automatically calculate the dollar and percent adjustment. If the bidder enters a negative amount that applies to the price tier, that amount is subtracted from the base price to determine the net bid price for the tier. If the bidder enters a negative percentage that applies to the price tier, the percentage is multiplied against the base price to determine the discount amount, and that amount is subtracted from the base price to determine the net bid price for the price tier. The discount percentage is automatically calculated and appears if the bidder enters a discount amount. In the same manner, the discount amount is automatically calculated and appears if the bidder enters a discount percentage. The bidder can enter the discount percentage or the discount amount.

The bidders can also specify whether the price terms are based on a quantity ordered to date or based on the current order quantity. If the bidders select quantity to date, the cost per item is based on a cumulative quantity ordered. If the event is awarded to a contract and there are multiple releases (orders) against the contract, the price is based on the cumulative ordered quantity of the orders related to the contract. If instead the bidders select current order quantity, the price is based on the quantity that relates to the specific release against the contract.

Entering Bids with Optional Quantities

If an event line is marked as quantity optional, for example for a services type of request, bidders are not required to enter the quantity for that bid. An enterprise could solicit a bid for consulting and may decide that it wants bidders to quote a flat amount for the entire implementation, instead of offering consultants at a rate per hour. In this case, the bidders enter an amount, but not a quantity.

Alternate Units of Measure

Event creators can indicate if alternate units of measure are allowed on a bidding event. The event creator can specify whether bidders can bid using any alternate unit of measure or only existing item/unit of measure relationships. If allowed, bidders may select a different unit of measure when bidding on a line. All line price and quantity details are converted to the bidder's selected unit of measure based on the specified conversion rate. During analysis, the bid prices are reflected based on the line item's unit of measure.

See Also

Chapter 9, "Creating Events," Alternate Unit of Measure Conversion, page 125

Bid Factors

If the event creator used functional bid factors, and information already exists for a bidder, the response to the functional bid factor automatically populates on the response page. Bidders may not change responses that are automatically populated. If the information does not exist, the response isn't populated and therefore the bidder may enter the response.

Upon posting a bid, the system verifies that all required bid factors have been responded to, and alerts the bidder if a required bid factor was not answered. The system also verifies that the mandatory responses were provided for bid factors with an ideal response requirement, and alerts the bidder that their bid is disqualified if the ideal response is not provided. Bids that are disqualified are not eligible to be awarded.

Bid Rankings

PeopleSoft Strategic Sourcing ranks individual bids for auction events and provides the option to enable bidders to view their ranked bids. Bidders can see where their best-posted bids rank compared to the best bids from other bidders. For example, a bidder can view his or her bid ranking as fourth out of all the bids received. Whenever a new bid is posted, the system recalculates the rank.

Bidders can also view how many suppliers have bid at least once on an auction. A bidder can see that his or her best bid ranks fourth out of nine, thus indicating to the bidder that nine bidders have bid on the event thus far. In cases where bidders may view the bid history for an event, the system displays the rank on the bid history versus the price or score. Event creators can use ranking in situations where they don't want to reveal what the leading bid price is, but still must convey to the bidder where the bidder stands in the bidding process.

Note. Proxy-enabled auction events cannot be ranked.

Event Lots

If multiple auction events are linked together in lots, you must bid on them in order. After bidding on the first event, the system provides a link to the next event in the linked lot list on the Bid Confirmation page.

Bid Uploads

If the event has the option to download bids, the system creates an XML document and attaches it to the event. A bidder can detach the XML document and use Excel 2002 or later to open the document and view it in spreadsheet format. Once the bidder has created the bid response and is ready to upload, the bidder saves the spreadsheet as a XML document. The bidder then uploads the XML document into the PeopleSoft Strategic Sourcing and registers it as an incoming bid.

Internal users can upload bids when bidding on behalf of another bidder. It's the same process as entering a bid on behalf: the user selects to upload a bid instead of entering a new bid.

Multiround Events

Bidders always bid on the most recent round and version of events. The system displays the round or version number on the Create Bid Response page.

If a new round is created for an event where you have already entered a bid, the system displays a Counter Event button on the Event Details page.

Instant Messaging

To facilitate collaboration between event owners and bidders, PeopleSoft Strategic Sourcing provides chat or instant message capabilities between event creators and bidders. Bidders can initiate chats with an event owner, which enables bidders to receive immediate responses on questions or clarifications for a selected event. This is especially critical during auction events, which are often time sensitive.

Optionally, internal collaborators may also chat among themselves during the collaboration process. Multiple collaborators can participate in a single chat.

PeopleSoft Strategic Sourcing uses the PeopleTools MultiChannel Framework technology infrastructure to support multiple interaction channels for PeopleSoft users who must respond to incoming requests and notifications on these channels.

Common Elements Used in This Chapter

Submit Bid	Click this button to submit the bid. Upon posting, a bidder receives a confirmation email containing the bid details.
Save for Later	Click this button to save the bid before posting it. This is helpful to protect data already entered, take a break from the work, or research the answer to a certain bid factor. To return to the bid and complete it, you must access the Search Event page to edit the particular bid.
Validate Entries	Click this button to validate the bid for errors prior to saving or posting a bid.

Recalculate Scores	Click this button after you have entered all of the bid information on an auction event. The system then calculates and displays the score. You can now can now analyze the bid, based on the score received, and change the price offered or answer a bid factor question differently to obtain a better score.
	Note. This button appears only for score-based auction events.
Worst, Best, and **Ideal**	Indicates the range of preferred responses to the bid factor. Bidders who respond with the worst responses receive the lowest scores, while bidders who respond with the best responses receive the highest scores. In some cases, bidders are required to respond with the ideal response in order for their bids to be considered for awards. If a bidder is unable to respond with the ideal response, the bid can be posted but is disqualified and not available for award.

Using PeopleSoft Strategic Sourcing Pagelets

This section discusses the supplier-facing pagelets that bidders see when they log in to view and bid on events:

•   My Sell Events

•   My Buy Events

•   My Event Discussions

Pagelets appear whether the bidder is a vendor, bidder, or customer.

See Also

Pages Used to View Strategic Sourcing Events

Page Name	Definition Name	Navigation	Usage
My Sell Events (external)	AUC_MY_AUC_PGLT_W	Opens on login.	View events to which the bidder has been specifically invited to bid, or which are open to all bidders. The bidder clicks the Event Name to access the Event Details page, on which the bidder can enter or update his or her bid. The events on the My Sell Events pagelet are the event creator's buy events; the events are for items and services to buy from an individual or organization
My Buy Events (external)	AUC_MY_AUC_PGLT_W	Opens on login.	View events to which the bidder has been specifically invited to bid, or which are open to all bidders. The bidder clicks the Event Name to access the Event Details page, on which the bidder can enter or update his or her bid. The events on the My Buy Events page are the event creator's sell events; the events are for items and services to sell to an individual or organization.
Event Discussions (external)	AUC_MESSAGE_ENTRY	Opens on login.	View discussion for events to which the bidder is invited.
My Event Activity (external)	AUC_BID_ACT_MY	Manage Events and Place Bids, My Event Activity	Bidders can view their bidding activity.

Placing Bids

To create price adjustments, use the Price Adjustments (PRICE_ADJUSTMENT) component.

This section discusses how to:

• View the Bidder homepage.

- Search for sourcing events.

- Access event details.

- Download XML bid packets.

- Enter bid responses for RFx events.

- Enter bids beyond award requested quantities.

- Select a different unit of measure.

- Enter bids using automatic proxy bidding.

- Enter price components.

- Enter price adjustments.

- Upload bids.

- Bid on linked events.

- Enter bids for RFI events.

- Enter a bid during preview period.

- Save a bid.

- Update a bid.

- Cancel a bid.

- View rankings and scores.

Pages Used to Place Bids

Page Name	Definition Name	Navigation	Usage
<Bidder Name> Bidding Home Page	AUC_BID_HOME_PG	Manage Events and Place Bids, Bidding Home Page	View the bidder homepage and inquire on events, manage your profile, or view events to which you have been invited.
View Events and Place Bids	AUC_RESP_INQ_AUC	Manage Events and Place Bids, View Events and Place Bids	Bidder search for events on which to bid.
Manage Saved Searches	AUC_PREF_MG_SEC	Click the Manage Saved Searches link on the View Events and Place Bids page.	**Note.** You can access this page only if there are saved searches. Delete saved searches.

Page Name	*Definition Name*	*Navigation*	*Usage*
Save Search Criteria	AUC_PREF_PRMPT_SEC	Click the Save Search Criteria link on the View Events and Place Bids page.	Save search criteria.
Event Discussion	AUC_MESSAGE	Click the Discuss link for an event on the View Events and Place Bids page.	Participate in a discussion.
Event Details	AUC_RESP_INQ_DTL	Select an event from the View Events and Place Bids page.	View a summary of the sourcing event. From this page, bidders can choose to enter bids or review counter offers, upload bids, accept or decline event invitations, view bid history for the event, or view the bidder's entire bidding activity across all events.
Create Bid Response	AUC_RESP_BID_HDR	Click the Bid on Event button on the Event Details page.	Enter a bid response for RFI events.
Create Bid Response	AUC_RESP_BID_NUHD	• Click the Bid on Event or Counter Bid button on the Event Details page. • Sourcing, Event Responses, Create Bidder Response	Respond to header bid factors for auction and RFx events.
Question Comments and Attachments	AUC_RESP_COMHF_SEC	⬭ Click the Response Line Comments button on the Create Bid Response - Event Details page.	View or add comments and attachments about the question. **Note.** To improve performance for auction events, the comments button will always display with dots if there are comments or not. For RFX events, the comment button will display without the dots if comments are not present.
Search Bidder Activity	AUC_BID_ACT_SRCH	Sourcing, Event Responses, Search Bidder Activity	Internal users can view the bidding activities for a selected bidder.

Page Name	Definition Name	Navigation	Usage
General Comments and Attachments	AUC_RESP_COMH_SEC	Click the Add General Comments and Attachments link on the Create Bid Response - Event Details page.	View or add general comments and attachments about the event. **Note.** To improve performance for auction events, the comments button will always display with dots if there are comments or not. For RFX events, the comment button will display without the dots if comments are not present.
Event Bid Factor List	AUC_RESP_LBFHD_SEC	Click the Bid Factor List link on the Create Bid Response - Event Details page.	Bidders can select responses for header multiselect list bid factors.
Cancel Bid	AUC_RESP_CANCEL	Click the Cancel Bid button on the Create Bid Response - Event Details page.	Bidders can cancel saved bids or cancel posted bids for RFx and RFI events.
Create Bid Response - Line	AUC_RESP_BID_NULN	Click the Bid link on the Create Bid Response - Event Details page.	Respond to bid factors for each line item.
Unit of Measure Conversion	AUC_RESP_UOMC_SEC	Click the Select a Different UOM link for the line item on the Create Bid Response - Event Details page.	Enter the bid quantity using an alternate unit of measure than was originally requested on the event.
View Associated Terms	AUC_RESP_CLSH_SEC AUC_RESP_CLSL_SEC	• Click the View Associated Terms link on the Event Bid Factors page. • Click the View Associated Terms link on the Line Bid Factors page.	View the bid factor questions and any associated clauses with the bid factor. **Note.** This link and page are available only if there are associated clauses to the bid factor.

Page Name	*Definition Name*	*Navigation*	*Usage*
Line Comments and Attachments	AUC_RESP_COMLN_SEC	Click the Add/View Question, Comments and Attachments button on the Create Bid Response - Event Details page.	Add or view questions, comments, and attachments for bid lines. **Note.** To improve performance for auction events, the comments button will always display with dots if there are comments or not. For RFX events, the comment button will display without the dots if comments are not present.
Price Component Breakouts	AUC_RESP_PCMPT_SEC	Click the Enter Price Components link on the Create Bid Response Line Details page.	Use to enter all components of the bid price, such as cost, profit, shipping, tax, and so on.
Price Breaks	AUC_RESP_PBRK_SEC	Click the Enter Price Break Discounts link on the Create Bid Response Line Details page.	Enter price breaks based on volume for each line.
Shipping Address	AUC_RESP_SHIP3_SEC	Click the Ship to or Ship From Address button on the Create Bid Response Line Details page.	View the shipping address.
Decline Invitation	AUC_RESP_BID_INV	Click the Decline Invitation link on the Event Details page.	Select a reason for declining the event and optionally enter additional comments.
Upload Bid	AUC_BP_UPLOAD	Click the Upload XML Bid Response link on the Event Details page.	Upload a previously created bid response in Excel or XML.
Bid Confirmation	AUC_RESP_BID_CONF	Appears after you have submitted a bid.	Displays confirmation that the bid has been submitted. If bidding on event linked in lots, this is where you access the next event in the lot.
Event Header Comments and Attachments	AUC_COMM_SEC	Click the Download XML Bid Packet link on the Event Details page.	View or add XML attachments to the event.

Page Name	Definition Name	Navigation	Usage
View, Edit or copy from Saved Bids	AUC_RESP_INQ_BIDS	Click the View, Edit or Copy From Saved Bids link on the Event Details page.	**Note.** This page is available only if you have saved or posted bids. Bidders can edit a saved bid or cancel a saved bid for any event type (RFI, RFx, Auction). Bidders can edit a previously posted bid for RFI or RFx events if the allow edit of posted responses is selected on the Event Settings and Options page.
Event Activity	AUC_BID_ACT_PG	• Manage Events and Place Bids, My Event Activity • Click the View Event Activity link on the View Events and Place Bids - Event Details page.	Bidders can view their personal bidding activities for only events to which they have been invited.

Viewing the Bidding Home Page

Access the <Bidder Name> Bidding Home Page (Manage Events and Place Bids, Bidding Home Page).

<Bidder Name> Bidding Home Page

This page lists links for frequently used bidder links. Only tasks that you have access to are available for selection.

Searching for Sourcing Events

Access the View Events and Place Bids page (Manage Events and Place Bids, View Events and Place Bids).

View Events and Place Bids page

Note. Bidders can view only events to which they have been invited.

Enter search criteria using any of these fields:

Use Saved Search	Select a previously saved search.
Event Type	Select the type of event on which you want to search. Values are *Auction* or *RFx*. If you want to search for all sourcing events, leave the field blank.
Event Status	Select a specific event status. Values are *Awarded, Cancelled, Not Awarded, Pending Award,* and *Posted.* Leave the field blank if you want to search on all event statuses.
Include Declined Invitations	Deselect this option if you do not want to include declined invitations in the search.

Results Should Include	Select any of these options to be included in the search:
	• Sell Event
	• Purchase Event
	• Request for Information
Manage Saved Searches	Click to delete saved searches.
Save Search Criteria	Click to save the search criteria.
Advanced Search Criteria	Click to search using advanced search fields such as item descriptions, categories, or start and end dates.

Search Results

Event ID	Click a link for the event to access the Event Details page.
Discuss	Click a link for the event to access the Event Discussion page.
	See Chapter 12, "Managing Events," Using Discussion Forums, page 230.

Accessing Event Details

Access the Event Details page (select an event from the View Events and Place Bids page).

Event Details page

Accept Invitation	Accepts the invitation to bid on this event. Use this if bidders are not ready to prepare their bids, but want to indicate their intentions to participate in the event. Bidders are not required to accept the invitation before preparing their bids. After you accept the invitation, you are returned to the Strategic Sourcing Events search page. You must return to Event Details page and click the Bid on Event button to enter the bid. You can accept event participation when bidding on behalf of another bidder.
Decline Invitation	Select to decline the invitation to bid on this event. You can decline event participation when bidding on behalf of another bidder. If you decline the event, you enter a reason code.
	If a bidder was invited to an event and declines the event invitation, the bidder can continue receiving updates on the event. Also, if a bidder declines the event invitation, the bidder can accept the invitation later and enter a bid for that event.

Bid on Event	Click to enter a bid response.
Bidding Shortcuts	Click any of these links to access other pages to view details regarding the event or bidder:

- View Event Activity: Access the Event Activity page, where you can view all events related to a specific bidder.

  See Chapter 14, "Placing and Managing Bids," Reviewing Bidder Activity, page 280.

- Download XML Bid Packet: Access the Event Header Comments and Attachments page, where you can download the XML or PDF version of the event.

- Upload XML Bid Response: Access the Upload Bid page if you have used the XML file to complete the bid response. The responses from the XML file is uploaded into the bid response pages.

  See Chapter 14, "Placing and Managing Bids," Uploading Bids, page 275.

Edit Bid	Click to modify or view an existing bid for the event.
	Note. Bidders can edit a saved bid or cancel a saved bid for any event type (RFI, RFx, Auction). Bidders can edit a previously posted bid for RFI or RFx events if the editing posted responses is permitted on the Event Settings and Options page.
Discuss Event in Forum	Click to enter the event discussion forums.
Award Details	Click to view information about the event award.
Request Live Chat	Click to chat with the event creator.

See Also

Chapter 12, "Managing Events," Using Discussion Forums, page 230

Downloading XML Bid Packets

Access the Event Header Comments and Attachments page (click the View Event Package link on the Event Details page).

Attachment File	Displays the name of the attached file.
Attachment Description	Displays the description of the attached file.
🔍	Click the View button to view or download the XML file.

Entering Bid Responses

Access the Create Bid Response page (click the Bid on Event button on the Event Details page).

Create Bid Response page (1 of 2)

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event:	2
Lines Responded To:	0
Your Total Line Pricing:	0.0000 USD

Hide Line Detail

★Bid Required   ⊕Line Comments/Files

Lines										
						Customize | ↗	First Previous Lines **1-2 of 2** Next Lines			
Line	Item ID	Description	Unit	Requested Quantity	Your Bid Quantity	Unit Start Price	Your Unit Bid Price	No Bid	Your Total Bid Price	
1	EB-001-A	Long Sleeve Biking Jersey, Men's	EA	6.0000	6.0000	20.000000		☐	0.0000 USD	Bid ○
2	10015	AT9090 Altimeter	EA	5.0000	5.0000	30.000000		☐	0.0000 USD	Bid ○

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Submit Bid]   [Save for Later]   [Validate Entries]

Return to Bidding Homepage

Create Bid Response page (2 of 2)

Discuss Event in Forum	Click to access discussion forums to discuss the event with other users.
Request Live Chat	Click to initiate chat with the event creator using the Multichannel Framework.
Response	Bidder enter their answer to the bid factor.
Add Comments	Enter any comments related to the bid factor response.
View Associated Terms	Click to view any contract agreement terms or clauses.

Enter Line Bid Responses

Item ID	The vendor's Item ID appears in the Lines grid after clicking the Bid on Event button on the Event Details page. If the vendor's Item ID has not been added on the Purchasing Attributes - Item Vendor page (Items, Define Items and Attributes, Purchasing Attributes, Item Vendor), the Item ID defaults to the system value.
	See *PeopleSoft Purchasing PeopleBook,* "Defining Purchasing Item Information," Defining Purchasing Item Attributes
Your Bid Quantity	Enter your bid quantity for the line. If the requested quantity is required, the quantity will automatically be populated with the requested line quantity and cannot be changed.
Your Unit Bid Price	Enter the unit bid price for this line item.
No Bid	This check box is enabled when a bid is not required for an event line.

Bid   Click to access the Create Bid Response - Line Details page for the line.

See Also

Chapter 9, "Creating Events," Price Adjustments, page 126

Entering Bids Beyond Award Requested Quantities

Access the Create Bid Response - Event Details page, and click the Bid link for the line.

Line Details page

No Bid	This check box is enabled when a bid is not required for an event line.
Select a Different UOM	Click this link if you want to submit a bid using a different unit of measure. This link is available only if the event allows bidders to submit bids in alternate units of measure.
Your Max Bid Quantity	Enter your maximum bid quantity for the original unit of measure for the event.

Selecting a Different Unit of Measure

Access the Unit of Measure Conversion page (click the Select a Different UOM link for the line item on the Create Bid Response - Event Details page).

Bid Unit of Measure	Select a different unit of measure for the line item.
Conversion Rate	This display-only field indicates the conversion rate used for the new unit of measure.

Your Unit Bid of Measure

Quantity, Max Quantity, and **Min Quantity**	The system calculates and displays the quantity requested for the original requested UOM using your *new* UOM.
Your Bid Quantity	Enter numerical values for the quantity and minimum bid quantity for the line using your new UOM.

Note. In cases where the requested quantity is required, or the bidder may bid up to the specified quantity, the bidder will be allowed to bid over the maximum quantity up to the next whole number in the bidder's unit of measure. For example, if 100 pens were requested with a unit of measure of each, but the bidder bid in boxes of 15 each, the requested quantity in boxes is 6.66. The bidder will be allowed to bid up to 7 boxes in this example.

Line Unit of Measure

The system displays the original quantities requested using the event line UOM.

Entering Bids Using Automatic Proxy Bidding

Access the Create Bid Response - Event Details page (select an event from the View Events and Place Bids page).

If you are using automatic proxy bidding, complete these fields:

Bid All Lines as Proxy Bid	Select this check box to indicate that all lines will be using automatic proxy bidding.
Your Unit Bid Price	Enter your unit bid price.
	If you are entering a flat bid, then enter the exact amount of the bid for the item.
	If you are entering a proxy bid, then enter your proxy unit bid price. The system enters the minimum (if a buy event) or maximum (if a sell event) required bid price to enable your bid to be the winning bid up to this specified bid price.
Proxy Bid	Select this check box if the price entered in the Your Unit Bid Price field is to be used as your proxy bid price for this line. You can also indicate if this bid is a proxy bid on the Line Detail page.
No Bid	This check box is enabled when a bid is not required for an event line.

Line Detail   Click this link to access the page where you can view other details for the
                                            line. You can also view or enter your bid information on this page.

Submitting Proxy Bids for Line Items

To submit proxy bids for line items:

1. Click the Line Detail link on the Create Bid Response - Event Details page.

2. Enter a numerical value in the Your Unit Bid Price field.

3. Select the Is Proxy Bid check box.

Note. The use of this page is optional. You can enter your bid information on the Create Bid Response -
Event Details page as previously mentioned.

Entering Price Components

Access the Price Components page (click the Enter Price Components link on the Create Bid Response Line
Details page).

For each designated component, enter the best unit price, component quantity, and the system calculates the
component price.

Entering Price Adjustments

Access the Price Breaks page (click the Enter Price Break Discounts link on the Create Bid Response Line
Details page).

Price Breaks page

OK	Click to return to the Create Bid Response page. Clicking OK does not submit the bid; the bidder must click the Submit button on the Create Bid Response page.
Cumulative Order Quantity	Displays the price adjustments which are based on the total quantity for the awarded contract.
Individual Order Quantity	Displays the price adjustments which are based on a specific order released from a contract.
Ignore Errors	Click this button to ignore calculation errors when saving. Errors must be fixed before posting a bid.

See Chapter 14, "Placing and Managing Bids," Bidder Price Breaks, page 254.

Line Detail Group Box

Bid Quantity	Enter the quantity of items on which you are bidding. This field is edited again with the minimum and maximum bid quantity fields entered during event creation.
	If the requested line quantity required is selected on the Event Settings and Options page, the system automatically populates the line quantity in the bid quantity.
	See Chapter 9, "Creating Events," Defining Basic Event Information, page 128.

Line Weight	Indicates the relative importance of the line item to the overall event. If the event creator does not set specific weightings, each line is weighted equally.
Total Line Score	Indicates the sum of the bidder's scores for the bid factor responses for this line.
	Note. This is applicable only for auction events.
Your Score	Indicates the bidder's score for this line item; the line weighting multiplied by the total line score.
	Note. This is applicable only for auction events.
Current Winning Score	Indicates the best score that any bidder has achieved for this line item.
	Note. This is applicable only for auction events.

Line Response Group Box

Worst	If an auction event has *bid price* as the only bid factor, and a bid increment was set by the event creator, the Worst field displays the current required bid. This current required bid is the last posted bid amount plus or minus (depending on whether the event is a sell or a buy) the bid increment. Any new bid, if it is for the entire event quantity, must be equal to or better than the amount in the Worst field.

Uploading Bids

Access the Event Details page (select an event from the View Events and Place Bids page).

Upload XML Bid Response	If you have downloaded a bid package XML file and have used the bid package to enter the bid, click to upload the completed XML bid file into PeopleSoft Strategic Sourcing. This accesses the Upload Bid page.

File Selection

Access the Upload Bid page (click the Upload XML Bid Response link on the Event Details page).

To upload a bid:

1. Open the Excel version of the event with which you have been working.

2. Select File, Save as, and save the spreadsheet as an XML spreadsheet type.

3. Click the Select XML File button, and select the XML Spreadsheet that was just saved.

4. Verify that the path is correct and click the Upload button.

See Also

Chapter 9, "Creating Events," Bidder Downloads, page 127

Bidding on Linked Events

Access the Bid Confirmation page by submitting a bid.

If the auction event that you bid on is linked to one or more other auction events in a lot, you must bid on them in order. The system provides a link to the next event in the linked lot list on the Bid Confirmation page. The end date and time of the first event is the start date and time of the second event, and so on.

Entering Bids for RFI Events

Access the Strategic Sourcing Events search page (Manage Events and Place Bids, View Events and Place Bids).

Select the Request for Informationcheck box and search for RFI events. Select an RFI event to access the Event Details page. Click the Bid on Event button to enter an RFI response. RFI events display only event header information and header bid factors because there are no lines in RFIs.

Bid on Event	Click this button to access the Create Bid Response page, where you can enter RFI responses.

Entering a Bid During Preview Period

If an event has a preview period, a bidder can enter and save a bid even though it cannot be posted. Responses are ready for posting as soon as the start time for the event is reached.

1. The bidder enters the bid but clicks the Save button, not the Post button (which is unavailable during preview).

2. When the start time arrives, the bidder accesses the bid for that event and clicks the Post button to post the event.

Note. Saved bids are *not* automatically posted when the start time arrives. The bidder must access the bid and post it.

Saving a Bid

The bidder can click the Save for Later button at any time to save his bid before posting it. This is helpful to protect data already entered, take a break from the work, or research the answer to a certain bid factor.

To return to the bid and complete it, the bidder must access the Search Event page to edit the particular bid.

Updating a Bid

How a bidder, after entering a first bid on any event, updates his or her bid depends on the event type:

*   On auction events, the bidder enters a new bid on the event.

    This provides a bidding trail for the event creator.

*   On RFx events, the bidder edits the original bid.

Canceling a Bid

To cancel a bid for an event, the bidder accesses the Search Events page, clicks the Edit button for the specific event, then clicks the Cancel button.

You cannot cancel posted bids for auction events.

Viewing Rankings and Scores

Depending on the settings that the event creator selected for the auction event, you can view rankings and scores on the Create Bid Response page. Define these settings on the Event Settings and Options page.

Bidders can optionally view:

*   Start prices.

*   The winning bid.

*   The Bid History page.

*   Current round and version.

*   The identity of all bidders.

*   Bid rank.

*   Number of bids.

*   Header score, line score, and combined total score (only for auction events).

Bidder Display Options

The event creator sets up bidder display options on the Event Settings and Options page in the Creating Events component.

See Chapter 9, "Creating Events," Defining Basic Event Information, page 128.

Beating Own Bid or Best Bid

The system displays whether a bidder must beat his or her best bid price or score or the winning bid price or score based on the Event Settings and Options page.

If Display Start Price to Bidders option is not selected on the Event Settings and Options page, and the bidder must beat his or her own bid, then each bidder sets his or her own start price based on the bidder's initial bid price.

Bids Required on All Lines

If you selected the Bidders Compete at Event Level option, and the bidder must beat his or her own previous bid, the system compares the total score/price from the best previous bid to the current bid and ensures that the current score/price is better than the previous score/price. In this case, it's possible for a bidder to bid higher on one or more line items on the subsequent bid as long as the overall total bid price/score is better than the previous bid. If the current bid does not beat the previous bid, the system issues an error and does not allow the bidder to post the bid.

If bid decrements are entered during event creation, apply the bid decrements to the bidder's previous bid on each line that has a decrement. This applies only if you selected the Bidders Compete at Line Level and Based on Price options on the Event Settings and Options page.

See Chapter 9, "Creating Events," Defining Basic Event Information, page 128.

If the system is not set to display the start price and the bidder must beat his or her own bid, then each bidder sets his or her own start price based on the initial bid price. So if a line has a price of $2,000, one bidder may enter an initial bid price of $2,500, and another bidder may enter an initial bid price of $3,000. From that point forward, each bidder must beat his or her previous bid price.

If the bidder must beat the current winning bid, compare the total score/price from the winning bidder to the current score/price for the bidder and ensure that the bidder's current total score/price beats the current winning total score.

Bids Not Required on All Lines

If you selected Bidders Compete at Line Level, and the bidder must beat his or her own previous bid, the system compares the line score/price from the bidder's best previous bid to the current bid and ensures that the current line score/price is better than the previous line score/price for each line bid on.

If the current bid does not beat the bidder's previous bid, the system issues an error and does not allow the bidder to post the bid. Any defined bid decrements must be applied to the bidder's previous best bid for each line. The bid decrement is applied to the maximum unit bid price. Therefore, if a bidder entered an initial unit bid price of $2,000, and the bid decrement is $200, the maximum unit bid price is updated to reflect $1,800 ($2,000 - $200) on the subsequent bid.

If the bidder must beat the current winning bid, the system compares each line score/price from the winning bidders to the current line score/price for the bidder and ensures that the bidder's current line score/price beats the current winning line score/price for each line bid on.

If the current bid does not beat the current winning bid for all lines bid on, the system issues an error. Again, apply the bid decrement to the current winning bid for each line.

Price Only Events

If the event is price-only and bids are not required on all lines, the system compares the unit bid price of each line to determine whether the bid beats the last bid or current winning bid. If the event is price-only and bids are required on all lines, the system compares the total bid price to determine whether the bid beats the last bid or current winning bid. If the event is not price-only, the system compares the score to determine whether the bid beat the last bid or the current winning bid.

Display Winning Bid

If you did not select the Display Winning Bid check box, theBidders Must Beat field value must be *Own Bid,* because you can't beat the winning bid if you don't know what it is.

Creating Bidder Responses

If you receive bids by mail, fax, or phone, you can enter the information into PeopleSoft Strategic Sourcing on behalf of the bidder. The bidder must be a registered and invited bidder and is treated by the system as any other bidder.

To create a bidder response:

1. Collect the bid information from the bidder.

2. Access the Search Criteria page from the Create Bidder Response menu.

3. To find the correct event and bidder, enter an Event ID or select an Event Format,Event Type,Event Name, or Bidder Type.

4. Click the Search button.

    The system displays the event information, including version and round, as well as the name of the bidder, customer, or vendor.

5. Click the Event ID link for the bidder.

6. Click the Enter a New Bid button to manually enter the bid, or click the Upload Bid button to upload a bid from Excel or XML.

Pages Used to Create Bidder Responses

Page Name	*Definition Name*	*Navigation*	*Usage*
Create Bidder Response	AUC_RESP_OBO_SRCH	Sourcing, Event Responses, Create Bidder Response	Search for the event on which the bidder wants to place a bid.
Enter Bid on Behalf of	AUC_RESP_OBO_SEL	Click the Event ID link for the specific event.	Link to the Create Bid Response page, where you can enter the bidder's bid factor responses.
Upload Bid	AUC_BP_UPLOAD	Click the Upload XML Bid Response link on the Event Details page.	Upload a previously created bid response in Excel or XML.

Reviewing Bids

This section discusses how to review bidder activity.

Pages Used to Review the Bid Activity of a Bidder

Page Name	*Definition Name*	*Navigation*	*Usage*
Search Bidder Activity	AUC_BID_ACT_SRCH	Sourcing, Event Responses, Search Bidder Activity	Search for bidders' responses to events.
Bid Activities	AUC_BID_ACT_PG	Sourcing, Event Responses, Search Bidder Activity Click a Bidder Name link on the Search Bidder Activity page.	Review events that a bidder has been invited to, has bid on, and has been awarded.
Create Bid Response	AUC_RESP_BID_NUHD	Expand the appropriate event ID on the Bidder Activity page, and then click the View Details button next to the appropriate bid.	Review the details of a bid that the bidder entered.
My Event Activity (external)	AUC_BID_ACT_PG	Manage Events and Place Bids, My Event Activity	Bidders use this page to view their own bidding activity. Bidders can access only the events to which they have been invited.

Reviewing Bidder Activity

To review bidding on an event by a specific bidder:

1. Enter a business unit, bidder type, or ID on the Search Bid Activities page.

2. Access the Bid Activities page by clicking the name of the company whose bidding activity you want to review.

3. Click one of the categories in the Search Events group box to populate the Events group box with specific events.

   You can view the number of events that a bidder was invited to or awarded or upon which the bidder bid. The system displays bids for the bidder across all sourcing business units.

4. In the Events group box, expand the event line to view the details of the invitation, bid, and award.

   If the award is for a consolidated requisition, the system displays an award for each purchase order that is created to the awarded bidder.

Here is an example of the Bid Activities page:

Bid Activities page

Bidders Reviewing Their Bids

Access the My Event Activity page (Manage Events and Place Bids, My Event Activity).

Bidders can use this page to view their own bidding activities. This page includes the same information for each bidder as the Bidder Activity page, except that bidders can see only their own bids.

Bidders can view their event status and navigate to events by clicking the linked event ID.

Chapter 15

Analyzing Bids and Awarding Events

This chapter provides overviews of bid analysis and event awards, lists common elements, and discusses how to:

- Analyze bids.

- Award events.

- Post awards.

Understanding Bid Analysis

After you have received bids in response to sourcing events, you can begin the bid analysis process. This process may include:

- Award splitting.

- Multiversion and multiround events.

- Analysis collaboration.

PeopleSoft Strategic Sourcing enables you to analyze responses from bidders.

You can analyze bids at any time during an event, or you can wait until it ends. In the case of a sealed RFx event, you must wait until the end of the event to analyze and award the event. If the event is an RFx event, you can change weightings to test what-if scenarios to determine how changing the weighting of bid factors affects the bidders' scores.

When analyzing events, you can sort the information using different criteria. For example, you can sort by highest score, lowest price, or lowest total cost to display the best bid.

You can filter out identical bid factor responses during bid analysis. This enables you to expedite the analysis and negotiation processes by viewing only those bid factor responses that differ across all the bidders.

When the event closes, evaluate the bid responses and award the event to the best bidder or bidders. PeopleSoft Strategic Sourcing enables you to break down awards to the line level and award by quantity or by percentage to one or more bidders per line.

If you are using constraints, these constraints can automatically default onto events and are used during the optimization process to determine an ideal award allocation, while adhering to the constraints. Edits are also performed when awards are posted to check that mandatory constraints are adhered to. This ensures that sourcing business policies are followed. You can also calculate the cost of a constraint to determine the financial impact of business policies as well as see the progress to date for global and business unit constraints.

If you are using the optimization tool, you can also request that the system recommend an ideal award based on lowest price, lowest cost, or highest score. You can compare different recommended awards to see how the award allocation differed.

See <u>Chapter 16, "Optimizing Strategic Sourcing Event Awards," page 311</u>.

Understanding Event Awards

Once you have analyzed bids and selected the best bid, PeopleSoft Strategic Sourcing enables you to award the winning bid. This diagram illustrates the process flow for a buy event from determining the winner to creating a purchase order or contract:
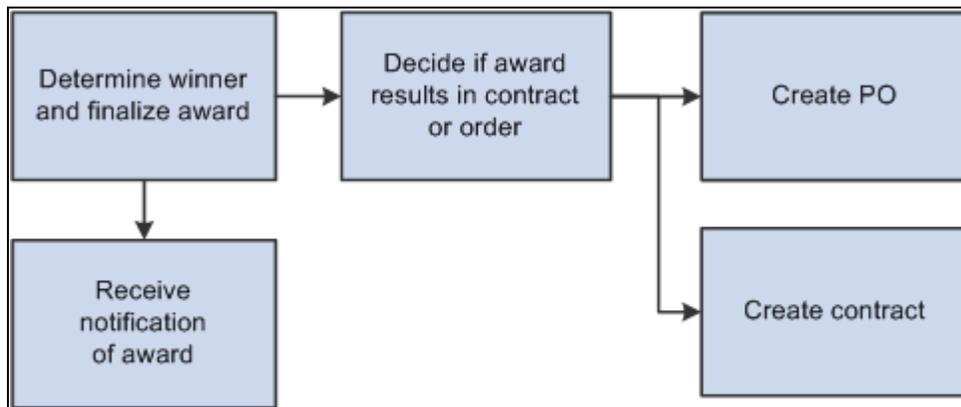
Awarding buy sourcing events process flow

To award buy events:

1. The buyer determines the winner and finalizes the award.

2. The buyer determines whether the award results in a contract or a purchase order if awarding a buy event.

3. The system creates a purchase order or a contract.

4. The system informs the winning and outbid bidders.

Award Splitting

You can split awards among bidders in two ways:

• Split by percentage.

The percentage must be based on the line quantity and cannot exceed 100 percent. For example, suppose that you award one bidder 75 percent and another bidder 25 percent. In this case, the award is 75 percent of each line item based on the price bid by the first bidder and 25 percent of each line item based on the price bid by the second bidder.

- Split by quantity.

  The quantity awarded cannot exceed the quantity bid. For example, if the event involves buying 100 items, but the bidder submits a bid to sell you 75 items, you can award the a purchase order for no more than 75 items.

Note. If any of the lines on the event are amount-only, then you cannot split the award between bidders.

Award Splitting Rules

There are several rules impacting award splitting:

- If a line is marked as quantity does not apply, you can split the award across multiple bidders.

  The award quantity is therefore be a decimal (.4) instead of a whole number. The total awarded quantity for a line marked quantity not applicable cannot exceed 1. This means that you can split an award across 3 bidders: Bidder 1 (.5), Bidder 2 (.4), and Bidder 3 (.1). If the award is made to a purchase order, the purchase order line is marked as amount-only; therefore, the line quantity on the awarded purchase order is automatically set to 1.

- If a sourcing line is an item by description and is not marked quantity not applicable, you can award a decimal quantity.

  This means that if the sourcing line had a quantity of 2, the user can award the following: Bidder 1 (1.25) and Bidder 2 (.75). When the purchase orders are created, they are created for the same quantity as designated on the award (1.25 and .75)

- If a sourcing line is an item from the item master table, then the system checks the unit of measure setting on the item setup to determine whether a decimal is allowed.

  This is based on whether the unit of measure for the item as a Quantity Precision setting of decimal or whole number. If decimal, the user may award the quantity using a decimal. Otherwise, the awarded quantity must be a whole number.

Multiversion Events

As soon as you post a new version of an event, the old version is no longer available for bidding. Therefore, the current version is always the version analyzed. If bid factors were added to a version, the system shows all the bids, but only the bids received on the most recent version include responses to the new bid factor.

Multiround Events

Multiround events are usually used for RFx events, when an event creator wants to start with a large pool of bidders and create another round with the most desirable bidders to continue negotiations. You counter entire bids or bid lines to create a new round. Optionally, you can reject bids that won't be carried forward to the next round and select a reason for the rejection.

RFIs

When an RFI event ends, its status is *Pending RFI Review.* The event owner can then review the RFI responses. For RFI events, the system displays only the Analyze RFI page with header information because there is no line information. Once the event owner has reviewed all of the RFI responses, the event owner sets the status to *RFI Reviewed.* This is the equivalent of the *Awarded event* status for buy and sell events.

Event Awards from Consolidated Requisitions

If the system consolidates an event from requisitions across multiple PeopleSoft Purchasing business units, upon award, the system creates one purchase order for each Purchasing business unit associated with the consolidated requisitions. You can view the entire history of this event, from requisition through event creation and purchase order creation, using the Auction Document Status page.

Awards for Quantity Optional Events

If a line is marked as quantity optional, bidders are not required to enter the quantity for that bid. Quantity optional bids are awarded by percentage, and the system updates the purchase order or contract to indicate the item is amount-only. When you award a quantity optional line, the award quantity is automatically set to one.

Analysis Collaboration

Collaborators can be invited to collaborate on the analysis of received bids once an event has ended. If collaborators participated in event creation collaboration, they are included on the collaborator list for bid analysis collaboration. Collaborators can enter scores to hidden bid factors, change bid factor weightings (if a non-auction event), manually score text based responses, and enter costs for text bid factors and bid factors that are marked as having user-defined costs. The system calculates an average score and cost based on the input of all the collaborators.

See Also

Chapter 10, "Using Event Collaboration," Collaborating on Event Analysis, page 201

Common Elements Used in This Chapter

Sort Bids By	On both the Analyze Total page and the Analyze Line page, you can sort the bids to display responses by *Bidder Name, Header Cost, Header Score, Total Bid Amount, Total Cost,* or *Total Event Score.*

Display Options   Select a display value:

- *View Factor Costs:* Select to view the bid factor costs when analyzing bids.

- *View Factor Responses:* Select to view the bid factor responses when analyzing bids.

- *View Factor Scores:* Select to view the bidder's scores for each bid factor when analyzing bids.

View Bid Actions   Select any of these sourcing event actions to view when analyzing bids:

- All Bid Actions: To include all bids.

- 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 it 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

- Reject: To reject but not disallow the bid.

  The system notifies the bidder that the bid was not accepted. This is used in situations with multiround events when a bid is not being carried forward to the next round.

- <No Action>

Analyzing Bids

This section discusses how to:

- View bids.

- Add bid factors.

- Export bid analysis data.

- Analyze events linked in lots.

- Viewing Multiround events.

- Counter bids.

- Disallow bids.

See Also

Pages Used to Analyze Bids

Page Name	Definition Name	Navigation	Usage
Analyze Total	AUC_ANALYZE_HD_PG	• Click an event link on the Manage Events page. • Sourcing, Maintain Events, Analyze Events, Analyze Total	Review each bidder's overall bid and score. Also review RFI responses. **Note.** PeopleSoft Strategic Sourcing enforces rules for various types of events. If the event is a sealed event, you cannot access the Analyze pages before the event end date.
Event Bid Factors	AUC_BID_FAC_PNL	Click the Add/Edit Bid Factors button on the Analyze Total page.	Add or modify header bid factors during analysis to see how various factors and weightings affect the final scoring.
Score Text Bid Factors	AUC_AWARD_HTXT_SEC	Click the Text Bid Factor Score button on the Analyze Line page.	Manually score text bid factor responses and incorporate this score into the total score. You can also optionally manually enter a cost associated with the text based response.
Pick List Bid Factor	AUC_HDR_LST_BF_SEC	Click the List Bid Factor button on the Analyze Line page.	Analyzers and collaborators respond to hidden list bid factors.
Response Factor Comments/Attachments	AUC_AWD_COMHF_SEC	Click the Comments button associated with each bid factor.	View comments and attachments associated with the response factor.
Bidder's Unit of Measure	AUC_AWD_BID_UOM	Click the Bid Unit of Measure button.	View the unit of measure conversion associated with the bidder.
Vendor Information	AUC_AWARD_VNDR	Click the linked bidder name on the Analyze Total page or the Analyze Line page.	View bidder details, such as contact and address information.

Page Name	Definition Name	Navigation	Usage
Edit Reason Code Details	AUC_AWD_RSN_SEC	Click the Reason Details button that appears after you have disallowed or rejected a bid or line.	Edit comments associated with a reason code. These comments are added to the rejection or disallow notifications sent to bidders if you selected the Email Comments check box.
Response Header Comments/Attachments	AUC_AW_HD_CMMT_SEC	Click the Header Comments button on the Analyze Total page.	View header comments and attachments for each bidder.
Header Bid Factor List	AUC_HDR_BF_LST_SEC	Click the Bid Factor List Items button on the Analyze Total page.	View list bid factors and their weightings.
Bid Analysis Export	AUC_ANL_EXP	Click the Go To Analyze Export link.	Export and email bid data for offline analysis.
Associate Planning Task	AUC_PLN_RQEV_WRK	Click the Go To Associate Planning Task link.	Associate sourcing project plan tasks to a sourcing event
Discussion Forums	AUC_MESSAGE_ENTRY	Click the Go To Discuss Event in Forum link.	Discuss the event in a discussion forum.
Document Status Inquiry	AUC_DOC_STATUS	Click the Go To Document Status Inquiry link.	View the history of an event, including the status of a document associated with an event, such as requisitions copied into an event and the purchase orders or contracts that were awarded from the event.
Header Comments and Attachments	AUC_COMM_SEC	Click the Go To Header Comments link on the Analyze Total page.	Enter award comments and attachments to include in the award.
Header Standard Comments	AUC_STD_COMM_SEC	Click the Standard Comments link on the Header Comments and Attachments page.	Enter default standard comments to appear in the award header.
Event Collaboration Details	AUC_EVENT_COLLAB	Click the Go To Invite Collaborators link on the Analyze Total page.	Invite collaborators to participate in analyzing bids.
Find Collaborators	AUC_COLLAB_SRCH	Click the Find Collaborators link on the Invite Collaborators page.	Search for collaborators and select those you want to collaborate on an event.

Page Name	*Definition Name*	*Navigation*	*Usage*
Recommend Award	AUC_AWD_RCMD_SEC	Click the Go To Recommend Award link on the Analyze Line or Analyze Total page.	Use the optimization engine to recommend an award. This option is available only if the Use Optimization Engine to Recommend Award option is selected on the Sourcing Installations page.
Analyze Line	AUC_AWARD_LN_PG	Click the Analyze Line link in the Analyze Events component.	Review each bidder's bid for each line item in the event.
Price Component Detail	AUC_AWD_CLB_PRCMPT	Click the Price Component Detail button on the Analyze Line page.	View price component detail entered by each collaborator.
Line Bid Factor Comments	AUC_AWD_LN_FCT_CMT	Click the Line Bid Factor Comments button on the Analyze Line page.	View comments associated with bid factors.
Line Bid Factor List	AUC_LN_BF_LIST_SEC	Click the Bid Factor List Items button on the Analyze Line page.	View weightings for bid factor lists.
Item Description	AUC_ITEM_2_DESCR	Click the item description link on the Analyze Line page.	View a detailed description of the item associated with the selected line.
Line Comments and Attachments	AUC_COMM_LN_SEC	Click the Line Comments button on the Analyze Line page.	Insert comments or attach files that relate to the line item. You can display the comments and attachments to the bidders.
Multi-Round Bid Factor History	AUC_BFL_HIST_SEC	Click the View Bid History button on the Analyze Total page. This button appears only if the event includes multiple rounds.	View bid factor history for multiround events.
Price Break Details	AUC_AWD_PBK_SEC	Click the View Price Breaks button on the Analyze Line page.	View the price break adjustments during bid analysis.
Price Component Detail	AUC_AWD_PRCMPT_DTL	Click the View Price Component Detail button on the Analyze Line page.	For events requiring price component detail, view the bidder's price component entries.

Viewing Bids

Access the Analyze Total page (Sourcing, Maintain Events, Analyze Events, Analyze Total).

Analyze Total page (1 of 2)

Analyze Total page (2 of 2)

Round to View	For multiround events, select the event round that you want to view.
Header Weighting	(Optional) Enter a default weighting for how the header score is weighted in relation to the total score.
Display Delta Responses	Select to filter out the bid factors that have identical responses from all of the bidders and highlight only those bid factors that have different responses.

Display Disqualified Bids	Click to include bids that you have marked as erroneous and canceled.
Display Withdrawn Bidders	Click to include bidders that have withdrawn from bidding.
Analyze	Click to analyze bids and to view bid factor information based on sort and display options.

Adding Bid Factors

You can add bid factors during analysis for RFx and RFI events to see how various factors and weightings affect the final scoring. You can do this from the Analyze Total page or the Analyze Line page, depending on whether you are adding a header bid factor or a bid factor for a line item.

To add bid factors during analysis:

1. Access the appropriate page, either the Analyze Total page or the Analyze Line page, depending on the bid factor that you are adding.

2. Click Add/Edit Bid Factors to access the Event Bid Factors page.

3. Add the bid factor or factors to consider, and set their weightings.

   For example, you might enter the bid factor *Working Relationship with Bidder.*

4. Click the OK button to set the bid factor and return to the Analyze Total page or the Analyze Line page.

5. Enter an answer for the bid factor.

   For example, for the bid factor *Working Relationship with Bidder,* you would enter an evaluation of each bidder; for instance, an *8* for one bidder and a *2* for another.

6. Click the Recalculate button to score the event with the new bid factor in the equation.

Exporting Bid Analysis Data

Access the Bid Analysis Export page (click the Go To Analyze Export link).

To create a bid analysis export:

1. Enter the email addresses of those you want to receive the export.

2. Click the Create Analysis Export button.

   At this point, the system saves the Analyze Events pages and initiates a process to create the Bid Analysis Export file and email the data to the designated recipients.

3. Once you receive the email, open the XML attachment in Microsoft Excel.

   This report displays the total price, score, and cost information for each bidder. You can use Excel 2002 or Excel XP to view the information

Analyzing Events Linked in Lots

Access the Analyze Total page.

Lots apply only to *auction* events.

Next Lot	Click to access the next event in the lot in a new window.
Previous Lot	Click to access the previous event in the lot in a new window.

Viewing Multiround Events

Access the Analyze Total page (Sourcing, Maintain Events, Analyze Events).

For a multiround event, the system automatically displays the current round and version, and you can move between rounds by clicking the Round to View button on the Analyze Total, Analyze Line, Analyze Summary, or Award Details page. If the business unit is set to award previous rounds, you can select a previous round for award. You can also view the bid history for all rounds on the Multi-Round Bid History page.

See Also

Chapter 2, "Setting Up Business Units in PeopleSoft Strategic Sourcing," Defining Strategic Sourcing Business Units, page 16

Countering Bids

Access the Analyze Total page (Sourcing, Maintain Events, Analyze Events).

To counter bids and create a new round:

1. For each bidder that you want to counter, change the value in the Bid Action field to *Counter.*

2. Change the value in the Bid Action field to *Reject* for any bidders that you don't want to include in the next round.

    You can select a reject reason code for why the bid is not being carried forward to the next round, and you can enter comments and email the comments to the rejected bidders so that they know why their bids were rejected.

3. Select *Create New Round* in the Go To menu.

The system opens the Event Details page in a new window, provides the existing event ID including the event data, and increments the round number by 1. The bidders that you countered are listed on the Invite Bidders page. The system also takes the best bid factor values of the countered bidders and that becomes the worst bid factor value for the next round.

Disallowing Bids

In general, you disallow a bid during auction events to correct a bid that was erroneously entered. For example, the bidder could have made a typo in the bid price. Rejecting is typically used for RFx events to indicate that the rejected bid is not being carried forward to the next round.

To disallow a bid from the Analyze Total page:

1. Navigate to the Analyze Total page, and select *Disallow* from the Award Event options.

2. Select a reject reason code that indicates why the bid is being disallowed.

3. View and update the comments related to the selected reason code and indicate whether the comments should be included in the email notification to the bidder.

The system sets the bid status to *Disallowed,* recalculates scores to exclude the disallowed bid, and sends the bidder an email notification indicating that the bid was disallowed. Also, the disallowed bid no longer appears on the Event Bid History page.

Awarding Events

This section discusses how to:

• Award the bid as a total event or a percentage of the event.

• Award the bid according to line items.

• Review constraints.

• Review a summary of the award.

• Verify shipment schedules.

Pages Used to Award Events

Page Name	Definition Name	Navigation	Usage
Analyze Total	AUC_ANALYZE_HD_PG	Sourcing, Maintain Events, Analyze Events	Award the bid as a total event or a percentage of the event.
Review Constraints	AUC_AWARD_CST_PG	Click the Review Constraints link from the Review Award Recommendation page.	Review event level constraints.
Review Line Constraints	AUC_AWD_LNCNST_SEC	Click the Yes or No link for a selected line from the Review Constraints page.	Review line level constraints.

Page Name	Definition Name	Navigation	Usage
Review Award Recommendation	AUC_AWARD_RCMD_PG	Click the Review Award Recommendation link from the Analyze Events page.	**Note.** This link is available only if you are using the optimization tool and have run the optimization process. Review recommendations for awarding the event. See Chapter 16, "Optimizing Strategic Sourcing Event Awards," page 311. See Chapter 15, "Analyzing Bids and Awarding Events," Reviewing a Summary of the Award, page 302.
Header Comments	AUC_COMM_SEC	Click the Header Comments link on the Analyze Total page.	Enter comments to send to the bidder or to include in the award. You can also view attachments and include them in the award.
Header Bid Factor List	AUC_HDR_BF_LST_SEC	Click the Bid Factor List Items button on the Analyze Total page.	View header bid factor lists.
Analyze Line (summary)	AUC_ANALYZE_HDL_PG	Click the Analyze Line link on the Analyze Total page.	Award the bid according to line items.
Analyze Line (bids by line item)	AUC_ANALYZE_LN_PG	Click the Analyze link for a line item on the Analyze Line (line summary) page.	View bid detail for multiple bidders by line item.
Award Summary	AUC_AWARD_SM_PG	Click the Award Summary link on the Analyze Total page.	Review the award summary by line item.
Event Line Defaults	AUC_CREATE_DFLTS	Click the Schedule Defaults link on the Award Summary page.	Review or change default shipping information.
Award Schedules	AUC_AWARD_SHIP_SEC	Click the Shipping button for the relevant line item on the Award Summary page.	Schedule shipping information.
Ship to Detail	AUC_AWARD_SHTO_SEC	Click the Select link on the Award Schedules page.	Look up ship to location information, and apply it to the award schedule.

Page Name	Definition Name	Navigation	Usage
Award Details	AUC_AWARD_DT_PG	Select the Award Details tab on the Analyze Total page.	Review the award details and post the award.
Bidder Information	AUC_AWARD_VNDR	Click the link for the bidder on the Analyze Total page or the Analyze Line page.	Review the bidder details, such as contact and address. For vendors and customers, you can select a different contact or address for the award.
Auction Document Status	AUC_DOC_STATUS	Click the Document Status Inquiry link on the Award Details page.	View procurement documents associated with this award.
Contract	CNTRCT_HDR	Click the linked awarded contract ID on the Award Details page.	Create and maintain contracts.
Purchase Order	PO_LINE	Click the linked awarded purchase order ID on the Award Details page.	Create and maintain purchase orders.
Award PO List (award purchase order list)	AUC_AWARD_PO_SEC	Click the Award PO List link on the Award Details page.	View all the purchase orders associated with an award.

Awarding the Bid as a Total Event or Percentage of the Event

Access the Analyze Total page (Sourcing, Maintain Events, Analyze Events).

Analyze Total page

Note. Entries that you make on the Analyze Total page override entries that you made on the Analyze Line pages. Similarly, entries on the Analyze Line pages override entries on the Analyze Total page.

	Click to add an award for an event. The system takes you to the Award Summary page and displays the quantity remaining to be awarded for a line.
	This button is available only if you have partially awarded an event or line and have remaining quantities to be awarded.
Award by Percent	Enter amounts under the bidders' names to split the event among bidders. The percentage amounts must total no more than 100 (but they can be less than 100 if you do not sell or buy the entire quantity proposed in the event).
	The Analyze Total page and the Analyze Line page update each other. That is, if you select the Award option for a particular bidder on one page, the check boxes on the other page are also selected for those items.

Awarding the Bid According to Line Items

Access the Analyze Line (summary) page (click the Analyze Line link on the Analyze Total page).

Analyze Line (line summary) page

Access the Analyze Line (bids by line item) page (click the Analyze link for a line item on the Analyze Line summary page).

Analyze Line (bids by line item) page

Note. Entries that you make on the Analyze Line pages override entries that you made on the Analyze Total page. Likewise, entries on the Analyze Total page override entries on the Analyze Line pages.

Line Information

Display Disqualified Bids   Select to display bids that have been disqualified. If the bid has been disqualified, the user isn't able to award to the bidder; therefore, the system changes the award quantities and percentages to read-only.

Analysis

Bid Quantity and **Minimum Bid Quantity**	System displays values entered by the bidder. This assists the event creators if they are making awards manually.
	If the bidder does not enter a minimum bid quantity, the system applies a value of *0* that indicates that the bidder will accept any award quantity.
Award by Percent	Enter amounts below the bidders' names to split the event among bidders. The percentage amounts must total no more than 100 percent, but the amounts can be less than that if you do not sell or buy the entire quantity proposed in the event. Note that the percent awarded cannot exceed the quantity bid for a selected bidder.
Award Quantity	Enter a quantity below the bidders' names to split the event among bidders. The amounts must total no more than the event's stated amount, but the amounts can be less than the stated amount if you do not sell or buy the entire quantity proposed in the event. Note that the quantity awarded cannot exceed the quantity bid for a selected bidder.
	Note. You must enter either the award percent or the award quantity, but not both.
	If any lines are associated with amount-only requisitions, then you cannot split them among bidders. You must award the entire line (100 percent) to one bidder.

Factors

Bid Unit of Measure	If the bidder can submit a bit using an alternate unit of measure, the page displays the (original) line unit of measure and the bidder's alternate unit of measure.

Reviewing Constraints

Access the Review Constraints page (click the Review Constraints link on the Review Award Recommendation page).

Review Constraints page

Constraints

If there are any event constraints, you can view them here. If you want to add constraints to the event, use this group box.

Note. You can add event constraints if the event has been posted but not yet awarded.

Constraint Code	Select the constraint that you want to add to the sourcing event. If constraints were added during event creation, those constraints appear.
	You can add additional constraints by selecting from predefined constraints or creating an ad hoc constraint that is event specific by entering a unique constraint code.

Apply

Select a value to indicate if you want the constraint to be considered when awarding. Values are:

- *Apply:* If you select this value, an award is recommended by the optimization engine or manually posted, and the constraint is validated against the award to ensure that it is adhered to.

- *Ignore:* If you select this value, this constraint is not considered by the optimization engine nor is it validated against when posting an award.

Sourcing Objective

Select a value:

- Target Goal: If you are not using the optimization engine, the system checks to ensure that the awarded quantities do not violate any of the award constraints.

  If the constraint is violated, the user receives a warning message during award posting. The user may elect to continue with the award or cancel the award posting.

  If you are using the optimization engine, it recommends an award based on the target goal for the event.

- Mandatory Goal: If you are not using the optimization engine, the system checks to ensure that the awarded quantities do not violate any of the mandatory constraints.

  If the constraint is violated and the user does not have authority to override mandatory constraints, the user isn't allowed to post the award. If the user has authority to override mandatory constraints, the user receives a warning message during award posting. The user may elect to continue with the award or cancel the award posting.

  If you are using the optimization engine, it recommends an award based on the mandatory goal for the event.

  See Chapter 16, "Optimizing Strategic Sourcing Event Awards," page 311.

Priority

Select a value to prioritize the importance of a constraint:

- *1 - Not Important*

- *2 - Less Important*

- *3 - Important* (default value)

- *4 - Very Important*

- *5 - Critical:* The default value for all mandatory constraints.

Note. This field is used with the Sourcing Objective field. Constraints with a high priority are factored first by the optimization engine when determining an award.

Line Constraints

Click Yes in the Constraints column to view line-level constraints. You can also add additional constraints. If No appears in the column, then there are currently no constraints for the line.

Note. You can only add constraints if the event is not yet awarded.

Reviewing a Summary of the Award

Access the Award Summary page (click the Award Summary link on the Award Details page).

Award Summary page

Note. Some fields on this page do not appear until you have entered award data on either the Analyze Total page or the Analyze Line pages.

Awarded Quantity	Displays the award quantity that you specified on the Analyze Line page.
Add Award for Selected Bidder	Select a bidder and click to add a new row and enter an award quantity for that bidder. Once an award has been posted for a bidder, you must make any subsequent awards for the round to the same bidder through this process.

Line Status	Displays whether the line is available for additional award if there is a remaining quantity. Values are:

- *O(Open)*: The line is still available for award. If any lines are open, the overall event status cannot be *Awarded.*

- *C(Closed)*: The line is no longer available for award. If the awarded line quantity equals the event line quantity, the line status is *Closed.*

  If the awarded line quantity is less than the event line quantity and the line status is set to *Closed,* the remaining quantity is not available for award.

  Lines that have been closed with a remaining quantity can be reopened by setting the line to *Open.* The event status is updated to *Pending Award.*

  If all lines have a status of *Closed,* and at least a portion of the event has been awarded, the overall event status is *Awarded.*

  If all lines have a status of *Closed,* and none of the lines have been awarded, the overall event status is *Not Awarded.*

Verifying Shipment Schedules

Access the Award Schedules page (click the Shipping button for the relevant line item on the Award Summary page).

Enter the following required values:

Physical Nature	Select to specify the nature of the event. Options are *Good* and *Service.* The system uses the value to calculate value-added tax (VAT) by differentiating between goods and services. This is required only for buy events. This value is based on the item or item category, but you can override it.
Where Performed	Select to indicate where a service is most often performed. This field becomes available when you select *Service* as the physical nature. Options are *Buyer's, Ship From, Ship To,* or *Supplier's.* This is required only for buy events. This value is based on the item or item category, but you can override it.

Award Quantity	Displays the same distribution ratio as the awarded quantity. For example, suppose that the original line item has a quantity of 100, Schedule 1 is awarded a quantity of 75 (or 75 percent), and Schedule 2 is awarded a quantity of 25 (or 25 percent). The awarded quantity is 75. Consequently, the Schedule 1 award quantity is 56 (75 percent of 75), and the Schedule 2 award quantity is 19 (25 percent of 75).

Note. If the line was awarded with a decimal quantity, the award quantity displays the decimal.

If requisitions are associated with an event and you are partially awarding the event, the requisitions are filled based on the requisition schedule due dates. The schedules with the earliest due dates are filled first.

Posting Awards

There are two types of events:

*   Buy events: These are awarded when you create a purchase order or contract, including details about the event items and the winning bid.

*   Sell events: These are awarded when you determine the purchaser of the asset or assets of the event.

     You must follow internal billing and shipping procedures to complete the sale.

This section discusses how to:

*   View award details.

*   Post awards.

*   Award sale events when using PeopleSoft Asset Management.

Page Used to Post Awards

Page Name	*Definition Name*	*Navigation*	*Usage*
Award Details	AUC_AWARD_DTL_PG	Click the Award Details link on the Analyze Total page.	Review the award details, select whether award is a purchase order or a contract, and post the award.

Viewing Award Details

Access the Award Details page (select Award Event in the Go To drop-down list on the Analyze Total page).

Award Details page

Bidders can view award details when the event status is awarded and you deselect the Display Bids check box on the Award Details page.

The system provides these settings as a default based on selections on the Strategic Sourcing Installation Options page.

Award Details

Award Type	Select the type of award to be used: *Purchase Order, Single Release PO Contract, PO Contract,* and *General Contract.*

> **Note.** The types of award available are determined by selections on the User Preferences - Strategic Sourcing page.

If any event lines are associated with amount-only requisitions, then you must select *Purchase Order* or *General Contract.*

If you selected the *Include on Contract* option for the bid factors, then the system includes those clauses and agreements on the awarded contract.

If there are no agreements associated with the bid factors, then you can create an ad hoc agreement on the contract for each bid factor marked *Include on Contract.* An ad hoc agreement is valid only for the awarded contract and is not available for any other contracts.

See Chapter 7, "Creating and Using Bid Factors," Specifying Bid Factor Attributes, page 100.

Show Award Details to Bidders

Display bids	Select to display the award details to bidders.

Display all bids   Select to display all bids to bidders. If not selected, only the awarded bids appear.

Display bid scores   Select to display the bid scores to bidders.

Display bids total bid price Select to display the total bid price for each bid.

Display factors   Select to display bid factor responses to bidders.

Award Lines

This section displays the award information based on the bidder's unit of measure. If the bidder submitted a bid using an alternate unit of measure, the award information reflects the alternate unit of measure information, such as unit of measure, award quantity, amount, and extended price based on the bidder's unit of measure.

See Also

PeopleSoft Application Fundamentals 9.1 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Defining Strategic Sourcing Installation Options

Posting Awards

Access the Award Details page (select Award Event in the Go To drop-down list on the Analyze Total page).

Award Details page

To create a purchase order or contract:

1. Select the type of award to be used: *Purchase Order, Single Release PO Contract, PO Contract,* and *General Contract.*

   Note. The types of award available are determined by selections on the User Preferences - Strategic Sourcing page.

   The system provides the Buyer and Terms as a default from the Header Details page. If no buyer is set on the Header Details page, the system checks to see if the user posting the award is a buyer and provides that value as a default. If the user is not a buyer, then the user must select a buyer before posting the award.

   See <u>Chapter 9, "Creating Events," Defining Header Details, page 133.</u>

2. Select a Purchasing business unit to post the award.

   However, if requisitions are associated with the event and the requisitions are across multiple Purchasing business units, the system uses those Purchasing business units to create the related purchase order awards.

3. Click the Post Award button.

    The system enables the Post Award button only if you granted the user such authority on the User Preferences page.

    See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining User Preferences," Defining Strategic Sourcing User Preferences.

    -   If lines remain open (status is *O*), the event status remains *Pending Award* until you close all of the lines.

    -   Once all the lines have been awarded, the status changes to *Awarded.* The winning bidder and the other bidders are notified of the award.

        Note. The awarding user must have the ability to create purchase orders, contracts, and vendors to award buy events.

        See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining User Preferences," Defining Purchase Order User Authorizations.

    -   If you are awarding to a registered bidder, a new customer or vendor ID is created.

        From this point forward, you search by customer or vendor to invite the bidder to future events. If the bidder was associated to one or more bidder groups, the bidder groups are automatically updated to reflect the new customer or vendor ID.

        Note. The system doesn't prompt the user. Instead there is a Vndr/Item Rel (vendor/item relationship) check box on the Award Details page for each line item that if selected, creates an item vendor relationship for each selected line.

    -   When a buy event is awarded and posted, the system populates the Purchase Order/Contract ID field on the Award Details page with the appropriate ID.

        Note. If multiple purchase orders are created for one award, the system displays the Award PO List link, which enables you to view all of the purchase order IDs.

    -   If you are awarding to more than one bidder on an event, you must post each award separately.

4. Complete the appropriate transaction:

    •   If you have awarded a purchase order, the system displays the Purchase Order component in
        PeopleSoft Purchasing.

        The system creates multiple purchase orders for one award if requisitions were consolidated across
        multiple Purchasing business units.

    •   If you have awarded a contract, the system displays the Contract component in PeopleSoft Purchasing.

        If you are using PeopleSoft Supplier Contract Management, the system will display the Contract
        component in PeopleSoft Supplier Contact Management.

    •   If you are awarding to a purchase order from an external purchasing application, when you click the
        Post Award button, PeopleSoft Strategic Sourcing initiates the Purchasing message
        (SAC_PS_PO_EIP) to generate the outbound XML message to an external purchasing system.

        The system won't send any data to PeopleSoft Purchasing. You cannot award to a contract.

        Note. For awards to an external purchase order, a schedule can have only one line. You can't include
        attachments and comments on awards to an external purchase order.

Unit of Measure Considerations

Event creators can select any unit of measure for the line items included in events. An item/unit of measure
relationship does not have to be defined at that point. However, when the event creator awards the event, an
item/unit of measure order relationship has to exist for the awarded item/unit of measure. If it does not exist,
the system issues an error explaining that you must create the relationship before posting the award. You
create this relationship on the Units of Measure page.

Canceling a Purchase Order or Contract for an Awarded Event

If the event is partially awarded, the system updates the remaining quantity open to indicate that the
remaining quantity is available to be sourced. If you manually close the line on Award Summary, the event
status changes to *Awarded.*

After you have awarded an event to a purchase order or a contract, the system retains links to the purchase
order and contract as a former sourcing event. In the event that any of the following happens to a sourcing
event awarded to a purchase order or contract:

•   The purchase order or contract is canceled.

•   The purchase order or contract line is canceled.

•   The purchase order schedule is canceled.

•   Quantities associated with the line or schedule are reduced.

The system prompts you to see if you'd like move that quantity back into the PeopleSoft Strategic Sourcing
award. If yes, the quantity is put back to the award and then you can either re-award the quantity to another
bidder or manually close it on the Award Summary page by setting the Line Status field to *Closed.*

See Also

PeopleSoft Purchasing 9.1 PeopleBook, "Creating Purchase Orders Online"

PeopleSoft Purchasing 9.1 PeopleBook, "Managing Requests for Quotes," Creating Purchase Orders or Contracts from RFQs

PeopleSoft Asset Management 9.1 PeopleBook, "Retiring Assets"

Awarding Sale Events When Using PeopleSoft Asset Management

If the event involves the sale of an asset managed through PeopleSoft Asset Management, PeopleSoft Strategic Sourcing automatically populates the Asset Management interface table (INTFC_FIN) to show the proceeds amount as equal to the award amount.

You then must run the Transaction Loader process (AMIF10000) in PeopleSoft Asset Management to create the retirement transaction for the asset. PeopleSoft Asset Management then sends this information to PeopleSoft Billing to create an invoice for the asset sale.

Chapter 16

Optimizing Strategic Sourcing Event Awards

This chapter provides an overview of the optimization feature and discusses how to:

*   Select Strategic Sourcing events for optimization.

*   Run the Optimize Award process.

*   Review award recommendations.

*   View award recommendations by line.

*   Review the award constraint summary.

*   Compare award recommendations.

Understanding Strategic Sourcing Optimization

You can use the optimization engine to analyze bids online or by using the batch process—Sourcing Optimization process (AUC_OPT_AE)—by using specific business constraints. The optimization engine recommends an award allocation based on best price, total cost, or score. You can optimize all events or a specific line by using the online process or the batch process. The optimization process includes all event information such as constraints, bid factors, and costs.

The optimization engine recommends award allocations based on best score, price, or cost while factoring all the constraints. After the optimization engine makes a recommendation, you can:

*   Accept the recommended award.

*   Change the recommended award.

*   Change global constraints, and then rerun the optimization process.

You can still analyze bids and award events online by using the Analyze Events component.

Understanding Optimization Results

When you select an event for optimization, the system sends all price, score, and cost information to the optimization engine for each bid. Depending on whether you selected to optimize based on price, cost, or score, optimization calculates the best award allocation based on that selection, while factoring in any constraints that are associated with the event. The optimization engine gives priority to mandatory constraints and higher priority constraints when determining an ideal award allocation. If you optimize by best cost or best price and two or more bidders have the best bid, the optimization engine uses the best score to determine the award allocation. In cases in which the optimization engine cannot produce a recommendation without violating one or more mandatory constraints, a message appears on the Review Award Recommendation page. You can access the Review Award Constraint Summary page to view which mandatory constraints were violated.

You can save the optimization results so that you can compare multiple optimization runs to each other to determine the impact of any changes that you made to the constraints or bid factors.

Pages Used to Optimize Strategic Sourcing Events

Page Name	*Definition Name*	*Navigation*	*Usage*
Search For Event To Optimize	AUC_OPT_EVSRCH_SEC	Sourcing, Maintain Events, Optimize Awards Click the Select Event link.	Select specific sourcing event awards that you want to optimize.
Optimize Awards	AUC_OPT_RUN_BATCH	Sourcing, Maintain Events, Optimize Awards, Optimize Awards	Optimize several sourcing event awards at one time.
Review Award Recommendation	AUC_AWARD_RMD_PG	Sourcing, Maintain Events, Review Optimization, Review Award Recommendation	View award recommendations after running the optimization process. **Note.** This page is available only if you selected the Use Optimization Engine to Recommend Award check box on the Strategic Sourcing Installation Options page.
Award Recommendation Results (by Bidder)	AUC_OPT_BID_LN_SEC	Click the Total Award Price link for the selected bidder on the Review Award Recommendation page.	View the awarded lines for the selected bidder.
Event Constraint Limit (by Line)	AUC_OPT_CNT_LMT_S2	Click the Yes link on the Award Recommendation Results (by Bidder) page.	View the constraints that limited the award for the selected line.

Page Name	Definition Name	Navigation	Usage
Award Recommendation Results	AUC_OPT_LN_SEC	Click the View Recommendations by Line link on the Review Award Recommendation page.	View recommendations for each line item.
Review Award Constraint Summary	AUC_OPT_CST_SEC	Click the View Award Constraint Summary link on the Review Award Recommendation page.	View the constraints associated with the sourcing event and for each line.
Event Constraint Limit	AUC_OPT_CNT_LMT_SE	Click the Yes link in the Event Constraint Limit column on the Review Award Recommendation page.	View the event-level constraints for the selected bidder.
Compare Award Recommendation	AUC_OPT_CMPREC_SEC	Click the Compare Award Recommendation link on the Review Award Recommendation page.	Compare award recommendations.

Selecting Strategic Sourcing Events for Optimization

Access the Search For Event To Optimize page (Sourcing, Maintain Events, Optimize Awards, and click the Select Event link).

Search For Event To Optimize page

Business Unit, Event ID,   (Optional) Select a value for any of these fields to further narrow the search
Event Type, Entered By, and   criteria.
Event Name

Search   Click this button to retrieve sourcing events that meet the selection criteria.

Click Run when you have finished selecting the search criteria. The system sends all the required event and
bid information and the constraints associated with the event to the optimization engine.

After the optimization process has finished, the system updates the event with the recommended results. You
can review the recommendation by using the Analyze Events component (Sourcing, Maintain Events,
Analyze Events).

Note. Only the event data for the active round and most current version of the event or line is used during the
optimization process.

Running the Optimize Award Process

Access the Optimize Awards page (Sourcing, Maintain Events, Optimize Awards, Optimize Awards).

Optimize Awards page

Business Unit   Select a single Strategic Sourcing business unit or a range of business units.
All events that have a status of *Posted* and have ended or are in a Pending
Award status will be optimized for the selected business units.

Entered By   (Optional) Select the individual to identify which events to optimize. Only
those users who have created sourcing events are available for selection.

Event ID   Select an event that you want to optimize. Only events with a status of
Pending Award or *Posted* and have ended are available for selection.

Select Event	Click this link to access the Search For Event To Optimize page.
Line Number	Select the line that you want to optimize. Leave this field blank if you want to optimize the entire event.
Based On	Select a value to indicate on what basis you want the bid to be analyzed using all event constraints:

- *Cost:* If you are optimizing an entire event, then the optimization engine recommends an award based on the cost for each line of the event.

  If you are optimizing a specific line, then only the costs associated with that *line* are used. Optimization recommends an award based on the lowest cost.

- *Price:* If you are optimizing an entire event, then the optimization engine recommends an award based on the price for each line of the event.

  If you are optimizing a specific line, then only the price associated with that specific line is used. Optimization recommends an award based on the lowest price.

- *Score:* If you are optimizing an entire event, then the optimization engine recommends an award based on the score for each line of the event.

  If you are optimizing a specific line, then only the score associated with that specific line is used. Optimization recommends an award based on the highest score.

Reviewing Award Recommendations

Access the Review Award Recommendation page (Sourcing, Maintain Events, Analyze Events, Review Optimization).
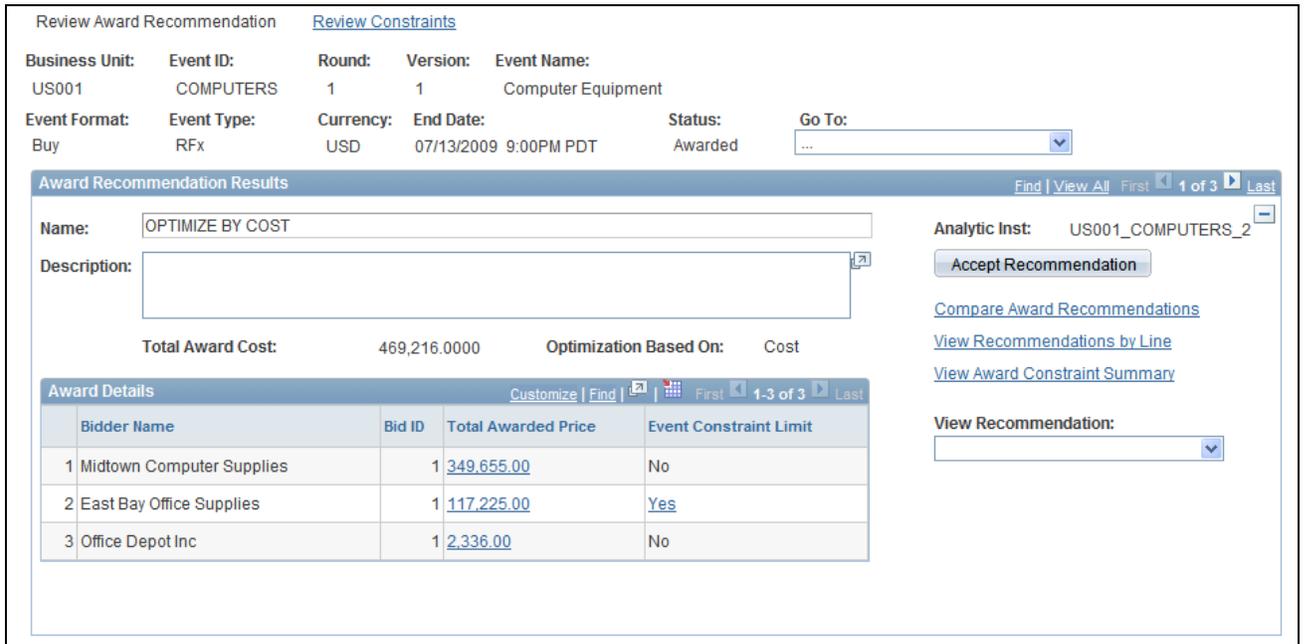
Review Award Recommendation page

Award Recommendation Results

Name and **Description**	Enter the name and (optional) description of the optimization results.
Analytic Inst (analytic instance)	A display-only system-generated field that identifies the process instance.
Total Award Cost	A display-only field that indicates the total award amount of the optimization instance.
Optimization Based On	A display-only field that indicates the basis used for the optimization instance. The value comes from the Optimize Awards page.
Bidder Name	The name of the bidder selected for the award.
Bid ID	The bid ID selected for the award.
Total Awarded Price	Click a price link to view the individual line items that are included in this total for each awarded bidder.
Event Constraint Limit	Indicates whether one or more constraints affected the award for the bidder. The values are *Yes* and *No.* For example, if a constraint were associated with the event that limited the amount of the award to bidders who had a low credit score, then the field would display *Yes* if the bidder would have been awarded more if the constraint did not exist. Click the Yes link to view the specific constraints that affected the award.

Accept Recommendation	Click to accept the recommendation without making any changes. After you click this button, the recommended award quantities are supplied on the Analyze Total and Analyze Line pages for each of the bidders. Access the Award Details page so that you can post the awards.
View Recommendation	Select a specific optimization run that you want to view.

Viewing Award Recommendations by Line

Access the Award Recommendation Results page (click the View Recommendations by Line link on the Review Award Recommendation page).

Award Recommendation Results page

Accept	Click to accept each award recommendation for each line. Use this option if you do not intend to accept the entire event award recommendation.

Reviewing the Award Constraint Summary

Access the Review Award Constraint Summary page (click the View Award Constraint Summary link on the Review Award Recommendation page).

Review Award Constraint Summary page

View the constraints associated with the sourcing event and for each line.

Sourcing Objective	Displays whether the sourcing objective has a *Target* or a *Mandatory* goal. The optimization engine tries to meet all mandatory constraints before attempting to meet target objectives.
Progress to Date	Displays the progress to date for the award.
Recommendation Result	Displays the result of the award recommendation as it applies to the specific event.
Calculate	Click to calculate the costs for each line. When you click this button, the optimization engine is rerun without the selected constraint to determine the cost. The difference between the award price with the constraint and the one without the constraint is the *cost* of the constraint.
Cost of Constraint	Click the Calculate button to have the system populate this field to display the costs of each line.

Comparing Award Recommendations

Access the Compare Award Recommendation page (click the Compare Award Recommendation link on the Review Award Recommendation page).

Compare Award Recommendation page

Step 1. Select the recommendations to compare.

Select	Select the check box for each recommendation that you want to compare. You can compare up to four different award recommendations at one time.
Recommendation Name	User-defined values that are available for selection depend upon the name of the optimization results.

Step 2. Select whether to compare the entire event or line within the event.

Line Number	(Optional) Select a specific line number to use in the comparison. Leave this field blank if you want to compare the optimization results for the entire event.
	Note. You can compare one line at a time or the entire event.
Compare	Click to compare the optimization results.
Accept Award	Click to accept the award recommendation for the selected recommendation.

Appendix A

Delivered Workflows for PeopleSoft Strategic Sourcing

This appendix discusses delivered workflows for PeopleSoft Strategic Sourcing.

See Also

PeopleTools PeopleBook: Workflow Technology

PeopleTools PeopleBook: PeopleSoft Applications User's Guide

Chapter 4, "Using Workflow in PeopleSoft Strategic Sourcing," page 47

Chapter 9, "Creating Events," page 121

Delivered Workflows for PeopleSoft Strategic Sourcing

This section discusses PeopleSoft Strategic Sourcing workflow. The workflows are listed alphabetically by workflow name.

Analysis Collaboration

The section discusses the Analysis Collaboration workflow.

Description

Event Description	Notifies collaborators that an event is ready for them to enter their input on the analysis pages.
Action Description	Notifies collaborators that they have been invited to provide analysis input.
Notification Method	Email and Worklist

Workflow Objects

Role	Collaborator

Template	Sourcing Analysis Collab

Approval Notification Updates

This section discusses the Approval Notification Updates sourcing plan notification.

Description

Event Description	Notifies selected users when a plan is approved or denied.
Action Description	A plan is approved or denied.
Notification Method	Email

Approval Notification Updates

This section discusses the Approval Notification Updates sourcing plan notification.

Description

Event Description	Notifies selected users when a plan is approved or denied.
Action Description	A plan is approved or denied.
Notification Method	Email

Approval Required

This section discusses the Approval Required sourcing plan notification.

Description

Event Description	Notifies approver that a plan requires approval.
Action Description	Sourcing plan is routed for approval.
Notification Method	Email and worklist

Approver Notice

The section discusses the Approver Notice workflow for bidder registration approval.

Description

Event Description	A bidder registers and registration approval is activated.
Action Description	Notifies bidder registration approver to review and approve a bidder's registration application.
Notification Method	Email

Workflow Objects

Role	Bidder registration approver
Template	Sourcing Approval

See Also

Chapter 3, "Preparing to Implement PeopleSoft Strategic Sourcing," Setting Up the Registration Homepage, page 35

Auction Bid Price Alert

This section discusses the Auction Bid Price Alert notification.

Description

Event Description	Bidder has a proxy bid and is the winning bidder, but the bidder's current bid price changes due to another bid that was posted on the line.
Action Description	Indicates that the bidder's current price has changed.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Sourcing Proxy Outbid

Bid Cancellation

The section discusses the Bid Cancellation workflow.

Description

Event Description	Bidder cancels bid.
Action Description	Confirms to a bidder that he has canceled his bid.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Bid Cancellation

Bid Notification

The section discusses the Bid Notification workflow.

Description

Event Description	A bidder creates an event response and submits the bid.
Action Description	Notifies a bidder that he has successfully posted a bid.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Bid Notification

Bid Rejection

The section discusses the Bid Rejection workflow.

Description

Event Description	The event creator changes the Award Status to rejected on the Analyze pages.
Action Description	Notifies a bidder that his bid is no longer being considered for award.

Notification Method	Email

Workflow Objects

Role	Bidder
Template	Bid Rejection

Cancellation of Plan

This section discusses the Cancellation of Plan sourcing plan notification.

Description

Event Description	Notifies selected users when a sourcing plan is canceled.
Action Description	User selects to cancel a sourcing plan.
Notification Method	Email

Change of Overall Plan Status

This section discusses the Change of Overall Plan Status sourcing plan notification.

Description

Event Description	The overall event status changes for the sourcing plan, for example, from On Track to At Risk.
Action Description	The event creator changes the overall event status for the sourcing plan.
Notification Method	Email

Change of Overall Step Status

This section discusses the Change of Overall Step Status sourcing plan notification.

Description

Event Description	The overall step status changes.

Action Description	The event creator changes the overall step status for the sourcing plan.
Notification Method	Email

Collaboration Completion

This section discusses the Collaboration Completion workflow.

Description

Event Description	The collaboration due date passes or all invited collaborators have provided their input.
Action Description	Notifies the event creator that the collaboration has ended either because the collaboration due date has passed or all invited collaborators have provided the necessary input.
Notification Method	Email

Workflow Objects

Role	Event Creator
Template	Collaboration Completion

Collaboration Notice

This section discusses the Collaboration Notice workflow.

Description

Event Description	Collaborators are added to an event and the event is routed.
Action Description	Notifies collaborators that they have been invited to collaborate on an event
Notification Method	Email and worklist

Workflow Objects

Role	Collaborator
Template	Collaboration Notice

Collaboration Removal

This section discusses the Collaboration Removal workflow.

Description

Event Description	A collaborator is removed from the Invite Collaborators page.
Action Description	Notifies a collaborator that his participation in the collaboration is no longer required.
Notification Method	Email

Workflow Objects

Role	Collaborator
Template	Collaborator Removal

Disallowed Bid Email

This section discusses the Disallowed Bid Email workflow.

Description

Event Description	On the Invite Bidders page, select Delete to remove a bidder from an event.
Action Description	Notifies a bidder that his bid was disallowed and therefore is canceled.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Bid Disallow

Duplicate Entity Contact Info

This section discusses the Duplicate Entity Contact Info workflow.

Description

Event Description	A registrant enters the same information as an existing company, and requests a summary of the individual company and its duplicate information.
Action Description	Notification email sent to registrants who enter information that coincides with an existing company. The email contains company name, duplicate information, and company contact information.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Sourcing Duplicate Information

Event Analysis Export Email

This section discusses the Event Analysis Export Email workflow.

Description

Event Description	In the Analyze Events component, select Analyze Export from the Go To menu. Click the Create Analysis Export button after filling out the email address.
Action Description	Sends an XML version of the bid analysis to selected users.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Event Analysis Export

Event Approval

This section discusses the Event Approval workflow.

Description

Event Description	The event status on the Approval page changes to *Posted* if the event is approved,
Action Description	Depending on the configured rules, the workflow sends an email and worklist entry to the role defined in the Approval Rules Setup component.
Notification Method	Email and worklist

Workflow Objects

Role	Configurable
Template	Sourcing Event Approval

Event Cancellation

This section discusses the Event Cancellation workflow.

Description

Event Description	The event creator cancels a posted event.
Action Description	Notifies invited bidders that a posted event has been canceled.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Event Cancellation

Event Edited

This section discusses the Event Edited workflow.

Description

Event Description	The event creator creates a new version of a posted event.
Action Description	Notifies bidders that a previously posted event has been edited.

Notification Method	Email

Workflow Objects

Role	Bidder
Template	Event Edited

Event Extension

This section discusses the Event Extension workflow.

Description

Event Description	The event creator extends the end date on an event.
Action Description	Notifies invited bidders that the event end date has been extended
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Event Extension

Event Interest Invitation

This section discusses the Event Interest Invitation workflow.

Description

Event Description	Bidders indicate the types of public events to which they'd like to be invited, and the event creator creates a public event
Action Description	Notifies noninvited bidders that a public event was posted in which they may be interested based on their self-categorization preferences.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Event Interest

Event Invitation

This section discusses the Event Invitation workflow.

Description

Event Description	The event creator posts an event and invites bidders.
Action Description	Notifies invited bidders that they have been invited to participate in a sourcing event.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Event Invitation

Event Lot Update

This section discusses the Event Lot Update workflow.

Description

Event Description	The event creator updates event lot dates.
Action Description	Notifies bidders that associated event lot dates have been updated.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Event Lot Update

MCF Agent Creation Notification

This section discusses the MCF Agent Creation Notification workflow.

Description

Event Description	An event queue has been created for an event, and the event creator has been created as a MultiChannel Framework agent.
Action Description	Notifies the event creator that he has been created as a MultiChannel Framework agent, which enables internal users to chat real-time with bidders using the MultiChannel Framework.
Notification Method	Email

Workflow Objects

Role	Event Creator
Template	MCF Agent Creation

New Contact Added

This section discusses the New Contact Added workflow.

Description

Event Description	A bidder adds a new contact in the Maintain Bidder pages.
Action Description	Confirms to the bidder that a new contact has been added.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Sourcing New Contact

Non-Winning Bidder

This section discusses the Non-Winning Bidder workflow.

Description

Event Description	The event creator changes the Award Status for the bidder to rejected on the Analyze pages.
Action Description	Notifies nonawarded bidders that they were not selected for award.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Sourcing New Contact

Outbid Notice

This section discusses the Outbid Notice workflow.

Description

Event Description	A bidder submits a better bid than other bidders.
Action Description	Notifies a bidder that he has been outbid on one or more sourcing event lines.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Outbid Notice

Pause Notification

This section discusses the Pause Notification workflow.

Description

Event Description	The event creator pauses a posted event.
Action Description	Notifies invited bidders that an auction event has been paused.

Notification Method	Email

Workflow Objects

Role	Bidder
Template	Pause Notification

Predecessor Task Completion Notification

This section discusses the Predecessor Task Completion sourcing plan notification.

Description

Event Description	A predecessor task is completed.
Action Description	Notifies selected users that all predecessor tasks associated with a sourcing plan have been completed.
Notification Method	Email

Reassignment of Tasks (Previously Assigned To) Notification

This section discusses the Reassignment of Tasks (previously assigned to) sourcing plan notification.

Description

Event Description	Previously assigned tasks are reassigned.
Action Description	Notifies previously assigned to users that their tasks have been reassigned.
Notification Method	Email

Reassignment of Tasks (Newly Assigned To) Notification

This section discusses the Reassignment of Tasks (newly assigned to) sourcing plan notification.

Description

Event Description	Previously assigned tasks are reassigned to different users.

Action Description	Notifies selected users that previously assigned tasks have been reassigned.
Notification Method	Email

Registration Approval

This section discusses the Registration Approval workflow.

Description

Event Description	The registration approver approves a bidder.
Action Description	Notifies the bidder that their registration request was approved, or notifies the registration approver that a bidder registration has been submitted for review.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Sourcing Approved

Registration Denial

This section discusses the Registration Denial workflow.

Description

Event Description	The registration approver denies a bidder.
Action Description	Notifies the bidder that their registration request was denied.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Sourcing Denied

Resume Notification

This section discusses the Resume Notification workflow.

Description

Event Description	The event creator resumes a paused posted event.
Action Description	Notifies invited bidders that a paused auction event has been resumed.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	Resume Notification

RFI Event Invitation - Edited

This section discusses the RFI Event Invitation - Edited workflow.

Description

Event Description	The event creator creates a new version of a posted RFI event.
Action Description	Notifies bidders that a posted RFI event has been edited.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	RFI Event Edited

RFI Invitation

This section discusses the RFI Invitation workflow.

Description

Event Description	The event creator posts an RFI event and invites bidders.
Action Description	Notifies bidders that they have been invited to a Request for Information (RFI) event.
Notification Method	Email

Workflow Objects

Role	Bidder
Template	RFI Invitation

Task Assignment

This section discusses the Task Assignment sourcing plan notification.

Description

Event Description	A sourcing plan is posted.
Action Description	Notifies specific users that they have assigned tasks associated with sourcing plans.
Notification Method	Email

Winning Bidder

This section discusses the Winning Bidder workflow.

Description

Event Description	The event creator changes the Award Status to Awarded on the Analyze pages.
Action Description	Notifies awarded bidders that they were selected for award.
Notification Method	Email

Workflow Objects

Role	Bidder

| **Template** | Winning Bidder |

Winning Bid Update

This section discusses the Winning Bid Update workflow.

Description

Event Description	Notifies a bidder that a bid is canceled (disallowed), and as a result they are now once again the winning bidder.
Action Description	Indicates that the bidder's is now again the winning bidder because a winning bid was canceled.
Notification Method	Email.

Workflow Objects

| **Role** | Bidder |
| **Template** | Sourcing New Winner |

Withdrawal Notification

This section discusses the Withdrawal Notification workflow.

Description

Event Description	The event creator counters an offer, and the bidder withdraws his bid.
Action Description	Confirms to a bidder that he has withdrawn from one or more event lines on a countered offer.
Notification Method	Email

Workflow Objects

| **Role** | Bidder |
| **Template** | Withdrawal Notification |

Appendix B

Scenarios for PeopleSoft Strategic Sourcing

This appendix provides real-life scenarios for using PeopleSoft Strategic Sourcing.

Understanding This Appendix

The scenarios in this appendix are examples of how to use some of the features within PeopleSoft Strategic Sourcing. These real-life examples describe some of the intended uses of these features, enabling you to understand how these features might be applied to your own organization.

Note. The real-life scenarios described within this PeopleBook may not conform to the business rules and procedures within your organization. Do not construe these examples as consulting or implementation advice for your specific industry or your individual organization. You should adapt or disregard the information here based on the needs of your organization. Oracle does not guarantee that the information included here will work as intended within your environment.

Scenario: Using Sourcing Optimization and Constraints

This scenario demonstrates how you can use sourcing optimization and constraints. The objective is to demonstrate how the system can determine an ideal award based on bid information as well as business policies that are associated to the event. Our scenario will use this criteria:

Event US001-COMPUTERS – Computer Equipment Purchase has been setup in the demonstration environment to use as an optimization example. It's a four line event that also has one user defined line group as well as bidder-defined groups. Optimization will look at the line group pricing, cost or score and factor that into the award recommendation. We have three event constraints associated with the event:

* Credit Score – bidders with a credit score of 25 or less may receive a maximum of 25 percent of the total event award

* Minority Owned Business – at least 15 percent of the total event award must be awarded to minority owned business bidders.

* Past Experience – only 20 percent of the total event award may be awarded to bidders with a poor or below average rating.

Step-by-Step Procedures

In this scenario, we have East Bay Office which has the best overall price and cost, however East Bay has an unknown or poor past experience and therefore may only receive a maximum of 25 percent of the entire award.

Optimization has already been run by score and cost so in this scenario we will run optimization by price and then compare all three optimization results.

Analyze the Event

Access the Analyze Event page (Strategic Sourcing, Maintain Events, Analyze Events).

Analyze Total

Analyze Total   Analyze Line   Analyze Group

Business Unit:	Event ID:	Round:	Version:	Event Name:		
US001	COMPUTERS	1	1	Computer Equipment		

Event Format:	Event Type:	Currency:	End Date:		Status:	Go To:
Buy	RFx	USD	07/13/2009 9:00PM PDT		Awarded	Award Events

▶ Bid Analysis and Display Options

Analysis

Bidder Name	Office Depot Inc	Midtown Computer Supplies	East Bay Office Supplies	CompUSA
Event Version Responded To:	1	1	1	1
Bid Number:	1	1	1	1
Total Bid Amount:	492,500.0000	492,500.0000	475,000.0000	498,000.0000
Total Bid Cost	501,875.00	492,500.00	490,625.00	504,250.00
Total Event Score:	64.4830	52.2260	45.8970	33.3280
Total Header Cost	0.00	0.00	0.00	0.00
Total Header Score:	63.4600	78.3840	48.8380	47.4500
Bid Action	NA	Award	Award	NA
Reject Reason:				
Award by Percent:				
Hide Bid	☐	☐	☐	☐

▶ Factors

Recalculate	Add/Edit Factors	Unhide Bids		<<	<	>	>>

Analyze Events – Analyze Total page

On the Analyze Total page, there is a total bid amount (price), total bid cost (which includes cost contributions from bid factors) and the total event score.

There are 4 bids on this event. East Bay has a poor or unknown experience. We have a business constraint that limits the amount that can be awarded to poor or unknown bidders to 20 percent of the total award; therefore East Bay can only receive a maximum of 20 percent of the total award. As we can see above, East Bay has the lowest total price and lowest total cost so when we optimize by cost or price, we'll see that even though East Bay has the lowest price and cost, they will only receive 20 percent of the award. This is within the 20% maximum award objective. On this event, Midtown had the best cost and score but East Bay had the lowest price. This was used by optimization to determine the ideal award.

Reviewing Constraints

Click the Review Constraints link on the Award Details page.

Analyze Events – Review Constraints page

This page shows the business policies and constraints associated with the event. You can associate constraints to the overall event as well as individual lines.

Click the Get Progress to Date button to calculate the progress against the defined constraints. This will show the amount and percent awarded for each constraint to date.

We can see that $233,730 has been awarded to minority bidders so far. Likewise, we can see that $233,730 has been awarded to Poor/Unknown bidders. The minority award percentage is 25% which exceeds the minimum requirement of 20%.

Recommending Awards

Click the Recommend Award link from the Go To menu.

Request Parameters page

Now we will run optimization by price and compare the results to the cost and score optimization runs.

Enter a recommendation name (you can enter any name). You have the option to run optimization for a selected line, but in this example, we will run it for the entire event. Select what to base the optimization on – price, cost, or score. Select price, since optimization has already been run by cost and score. Click the Solve button and wait for the system to return a message that optimization has completed.

When optimization runs, it factors several things in determining an award:

•   Lowest total price, lowest total cost, or highest total score - Depending on how optimization was run (price, cost, score).

•   Minimum/maximum bid quantities – A bidder cannot be awarded more quantity than they bid.

•   Will take price breaks into consideration.

•   Business constraints – factors in business policies and constraints when determining the award.

Optimization uses the constraint priority to determine the award. Higher priority constraints are met first. If a mandatory constraint cannot be met, the system will alert the user that a mandatory constraint was violated. For example, if a mandatory constraint requires 20 percent of business to be awarded to minority bidders, but no minority bidders bid on the event, optimization will still produce an award recommendation, but the system will alert the user that a mandatory constraint was violated. Once optimization completes, a message displays at the bottom of the page. Click the Return button.

Reviewing Award Recommendations

Select the Review Optimization link in the Go To drop-down list on the Analyze Events page.

Review Award Recommendation page (1 of 3)

Review Award Recommendation page (2 of 3)

Review Award Recommendation page (3 of 3)

Click the View All link on the Award Recommendation Results page to see the award recommendations by price, cost, and score. In this example, the total award cost varies based on the optimization type. The cost is lowest based on optimizing by price and highest based on score. We can see that the award amounts to each bidder vary by the optimization run.

Total Award Cost	This is the total amount of the recommended award.
Total Awarded Price	This is the award amount to each bidder. The sum of the bidder award price equals the total award cost.

Reviewing the Award Constraint Summary

Click the Review Award Constraint Summary link on the Review Award Recommendation page.

Review Award Constraint Summary page

Click the Calculate button for the CREDITSCORE constraint. This will calculate how much the constraint is costing the organization. The system will re-run optimization without this constraint and then compare the total award amount to the total award amount with the constraint applied to determine a cost. We see below that we could save $5,466 if this constraint was not required.

You can see the Recommended Result compared to the Progress to Date which shows the amount and percent.

Reviewing Award by Bidders

Access the Award Recommendation Results page by clicking the Office Depot bidder link from the Review Award Recommendation page.

Award Recommendation Results

Bidder Name: East Bay Office Supplies

View Recommendation by Bidder						Customize | Find | ⬚ | ⊞ First ◁ 1-2 of 2 ▷ Last	
Line	Item Descr	UOM	Quantity	Percent of Total	Awarded Unit Price	Total Awarded Price	Event Constraint Limit
1	Laptop Notebook PC; Wireless; DVD +/- RW	EA	75.0000	197.00	1,535.00000	115,125.0000 Yes	
4	Wireless Optical Notebook Mouse; 3 button	EA	75.0000	197.00	20.00000	1,500.0000 Yes	

Award Recommendation Results page

The award recommendation results shows the recommended award quantity and price for each bidder

Reviewing Recommendations by Line

Access the Review Recommendation by Line page by clicking the View Recommendations by Line link from the Analyze Events pages.

Award Recommendation Results

Review Recommendation by Line   Find First ◄ 1-7 of 7 ► Last

Line:	1	Item Descr:	Laptop Notebook PC; Wireless; DVD +/- RW
Requested Qty:	250.0000	UOM:	EA

Accept

Award Details   Customize | Find | ↗ | 📅 First ◄ 1 of 1 ► Last

Bidder Name	Bid ID	Award Quantity	Percent of Total	Awarded Unit Price	Total Awarded Price	Event Constraint Limit
East Bay Office Supplies	1	75.000000	197.37	1,535.00000	115,125.0000	Yes

Line:	2	Item Descr:	17 inch LCD Display Computer Monitor; Analog/Digital,
Requested Qty:	250.0000	UOM:	EA

Accept

Award Details   Customize | Find | ↗ | 📅 First ◄ 1 of 1 ► Last

Bidder Name	Bid ID	Award Quantity	Percent of Total	Awarded Unit Price	Total Awarded Price	Event Constraint Limit
Midtown Computer Supplies	1	75.000000	100.00	235.00000	17,625.0000	Yes

Line:	3	Item Descr:	Wireless Compact Keyboard
Requested Qty:	250.0000	UOM:	EA

Accept

Award Details   Customize | Find | ↗ | 📅 First ◄ 1 of 1 ► Last

Bidder Name	Bid ID	Award Quantity	Percent of Total	Awarded Unit Price	Total Awarded Price	Event Constraint Limit
Office Depot Inc	1	75.000000	197.37	32.00000	2,400.0000	Yes

Review Recommendations by Line page

The Review Recommendation by Line page shows the recommended award by line item. The Event Constraint limit indicates whether one or more constraints impacted the recommended award.

Viewing the Award Details

Access the Award Details page after clicking the Accept Recommendation button on the Review Award Recommendation page and then clicking the Save button.

Award Details page

You can post the awards for each bidder.

Viewing Updated Awards

Click the Review Constraints link from the Award Details page.

Review Constraints page

Click the Get Progress to Date button to view the updated award amount and percent.

Appendix C

PeopleSoft Strategic Sourcing Report Descriptions

This appendix provides an overview of PeopleSoft Strategic Sourcing reports and enables you to:

- View summary tables of all reports.

- View report details.

See Also

Chapter 12, "Managing Events," page 215

PeopleSoft Strategic Sourcing Reports: A to Z

These tables list the Strategic Sourcing reports, sorted alphanumerically by report ID. The reports listed are all Structured Query Reports (SQRs). If you need more information about a report, refer to the report details at the end of this appendix.

This section discusses:

- Cycle Time Analysis Report.

- Auction Summary Report.

Cycle Time Analysis Report

Report ID and Report Name	Description	Navigation	Run Control Page
AUCCYCLE AUCCYCLE	View the time calculations between key activities within the sourcing event life-cycle.	Sourcing, Reports, Cycle Time Analysis Report	AUC_CYCL_TM_RPT

Auction Summary Report

Report ID and Report Name	Description	Navigation	Run Control Page
AUCSUMM AUCSUMM	View changes in price, total cost, and score across bids for each bidder for auction events.	Sourcing, Reports, Auction Summary Report	AUC_SUMMARY_RPT

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