

Saving an Award Scenario in Sourcing Director

Step 1: Click on your Action Items and select "Sourcing Event Evaluations".

The screenshot shows the OK Corral Sourcing Director interface. At the top, the user 'Matthew' is logged in with 46 notifications and 16 alerts. The 'Action Items' dropdown menu is open, displaying the following items:

- My Assigned Approvals**
 - Requisitions To Approve: 1
 - Sourcing Event Evaluations: 2
- Unassigned Approvals**
 - Requisitions: 3
 - Purchase Orders: 2
 - Sourcing Event Evaluations: 37
- Orders**
 - My Returned Requisitions: 1

An orange arrow points from the user name 'Matthew' to the notification bell icon. Another orange arrow points from the 'Sourcing Event Evaluations' item in the 'Unassigned Approvals' section to the main content area of the page.

Step 2: Select the correct event from the list.

Total Results Found: 37 All Dates

Sort by: Results per folder: 20

Hide sourcing event details Page 1 of 2

Buyer Review/Dept Evaluation - Matt Wessel [37 results]

Event Number	Event Title	Assigned Approver	Submitted Date/Time	Submitted By	Action
OSUA&M-RFQ-000142-2018	Scientific Equipment	Not Assigned	9/13/2017 10:47 AM	Matthew Wessel	<input type="button" value="Assign"/>
Event Type: RFQ		Folders: 0 Days in folder		[Buyer Review/Dept Evaluation - Matt Wessel]	
Closed Date/Time: 9/13/2017 3:00 PM CST					

An orange arrow points from the 'Event Number' column to the first row of the table.

Step 3: View the suppliers' responses by clicking "View Response".

This event is **Under Evaluation**. You may view responses. Workflow Actions

Scientific Equipment
OSUA&M-RFQ-000142-2018

Type: **Request for Quote**
Event Status: **Under Evaluation**

Settings and Content >

Evaluations >

Supplier Responses

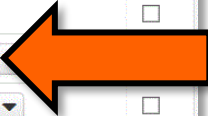
Tools >

Supplier Responses Event Actions History ?

Evaluation Actions

2 Invited Suppliers Evaluate Selected Responses

Progress	Response % Complete	Supplier Name	Total Bid	
Submitted	100%	Marty's Anything	49,750.00 USD	View Response
Submitted	100%	Matts Purchasing Test Vendor	53,300.00 USD	View Response



Step 4: Once done reviewing the supplier responses, click "Back to Event".

Sourcing > Sourcing Events > Search Events > Items

[Back to Event](#)

This event is **Under Evaluation**, and may be awarded once a winning bid has been chosen.

Scientific Equipment
OSUA&M-RFQ-000142-2018

Supplier: [Marty's Anything](#)
Bid Status: **Submitted**
Type: **Request for Quote**
Event Status: **Under Evaluation**

Prerequisites

Supplier Attachments

Questions

Response from Marty's Anything History ?

Items

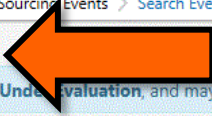
Product Line Items (2) Service Line Items (0)

Go To All Groups

★ Unit Price is Required

Group P1 (1 - 2 of 2 items)

#	Item Name, Description, Etc	Qty	UOM	Requested Delivery	Target Price (USD)	Unit Price (USD)	Total Price (USD)	Estimated Delivery
P1.1	Centrifuge per the attached	5	Each	-		4,250.00	21,250.00	10/13/2017



Step 5: Once back in the event click "Evaluation Actions" and choose "Evaluate All Response" from the drop-down.

This event is **Under Evaluation**. You may view responses. Workflow Actions ▾

Scientific Equipment
OSUA&M-RFQ-000142-2018

Type: **Request for Quote**
Event Status: **Under Evaluation**

Settings and Content >

Evaluations ▾

Supplier Responses

Tools >

Supplier Responses Event Actions ▾ | History | ?

Evaluation Actions ▾

- Evaluate All Responses
- Export All Responses

Evaluate Selected Responses

Progress ▲	Response % Complete ▲	Supplier Name ▲	Total Bid ▲	
Submitted	100%	Marty's Anything	49,750.00 USD	<input type="checkbox"/> View Response ▾
Submitted	100%	Matts Purchasing Test Vendor	53,300.00 USD	<input type="checkbox"/> View Response ▾

Save Progress

Step 6: Select the items you wish to award to the supplier by checking the box next to the items.

Scenario Award Actions ▾

	Marty's Anything ▾	Matts Purchasing Test Vendor ▾
Response Notes	<input type="text"/> 1000 characters remaining	<input type="text"/> 1000 characters remaining
<input checked="" type="checkbox"/> Total Bid	49,750.00 USD	53,300.00 USD
Subtotal: Required Items	49,750.00 USD	53,300.00 USD
Subtotal: Optional Items	0.00 USD	0.00 USD
<input checked="" type="checkbox"/> Product Line Items	49,750.00 USD	53,300.00 USD
<input checked="" type="checkbox"/> Group P1	49,750.00 USD	53,300.00 USD
<input checked="" type="checkbox"/> P1.1 Centrifuge per the attached specifications	22,500.00 USD	22,500.00 USD
<input checked="" type="checkbox"/> P1.2 Gas Chromatograph per the attached specifications	28,500.00 USD	30,800.00 USD
> Questions		

Step 7: Click on “Scenario Award Actions” and select the supplier you wish to award the selected items to.

Award Scenario for Scientific Equipment

View Scenario ▾ Save As... Reset Export ▾

Scenario Navigator Scenario Breakdown

Sort Bids by: Total Bid ▾ Ascending ▾ Show Supplier Response Notes Expand All Collapse All

Scenario Award Actions ▾	Marty's Anything ▾	Matts Purchasing Test Vendor ▾
Award To Marty's Anything	<input type="text"/>	<input type="text"/>
Award To Matts Purchasing Test Vendor		
No Award	1000 characters remaining	1000 characters remaining
<input checked="" type="checkbox"/> Total Bid	49,750.00 USD	53,300.00 USD
<input checked="" type="checkbox"/> Product Line Items	49,750.00 USD	53,300.00 USD

Step 8: Add award notes to “response Notes” section under the awarded supplier.

Example: “Lowest Bid. Met all specifications”

Step 8a: If rejecting the low bid, put your justification in the “Response Notes” section under the rejected supplier.

Example: Low bid did not meet specifications 2.1 and 2.5.

View Scenario ▾ Save As... Reset Export ▾ Finalize Award


Scenario Navigator Scenario Breakdown

Sort Bids by: Total Bid ▾ Ascending ▾ Show Supplier Response Notes Expand All Collapse All

Scenario Award Actions ▾	Awarded Scenario	Marty's Anything ▾	Matts Purchasing Test Vendor ▾
Response Notes		Lowest bid. Met all specifications. 965 characters remaining	<input type="text"/>
<input type="checkbox"/> Total Bid	Marty's Anything	49,750.00 USD	53,300.00 USD
Subtotal: Required Items		49,750.00 USD	53,300.00 USD
Subtotal: Optional Items		0.00 USD	0.00 USD

Step 9: Once finished awarding all items, click “Save As...”, name your scenario and Click “Save New”.

Award Scenario for Scientific Equipment

View Scenario ▾ Save As...  Finalize Award

Scenario Navigator Scenario Breakdown

Sort Bids by: Total Bid ▾ Ascending ▾ Show Supplier Response Notes Expand All Collapse All

&

Scenario Award Actions ▾ Awarded Scenario Marty's Anything ▾ Pending Award


Response Notes

<input type="checkbox"/> Total Bid	Marty's Anything	49,750.00 USD
Subtotal: Required Items		49,750.00 USD
Subtotal: Optional Items		0.00 USD
<input type="checkbox"/> Product Line Items	Marty's Anything	49,750.00 USD
<input type="checkbox"/> Group PL	Marty's Anything	49,750.00 USD
<input type="checkbox"/> #1.1 Contribution per the attached specifications	Marty's Anything (quantity 5)	21,250.00 USD

Save a New Scenario

Scenario Name * Awarding to Marty's Anything

Scenario Notes Lowest bid and met all specifications. 962 characters remaining

* Required Save New 

Matts Purchasing Test Vendor ▾

1000 characters remaining
53,300.00 USD
53,300.00 USD
0.00 USD
53,300.00 USD
300.00 USD
22,500.00 USD

Step 10: Click “Workflow Actions” and select “Approve” from the drop-down.

< Back to Event

Under Evaluation

Award Scenario "Awarding to Marty's Anything" for Scientific Equipment

View Scenario ▾ Save Save As... Reset Export ▾ Finalize Award

Scenario Navigator Scenario Breakdown Scenario Savings

Sort Bids by: Total Bid ▾ Ascending ▾ Show Supplier Response Notes Expand All Collapse All

Last updated 10/2/2017 10:14 AM

Workflow Actions ▾

- Approve
- Assign To Myself
- Reopen

