

PowerAdvocate Sourcing Intelligence®

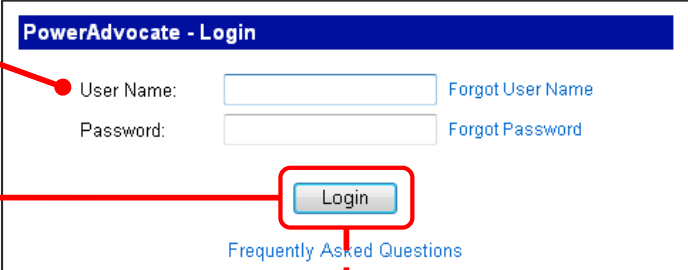
Buyers' Frequently Asked Questions

August 2019

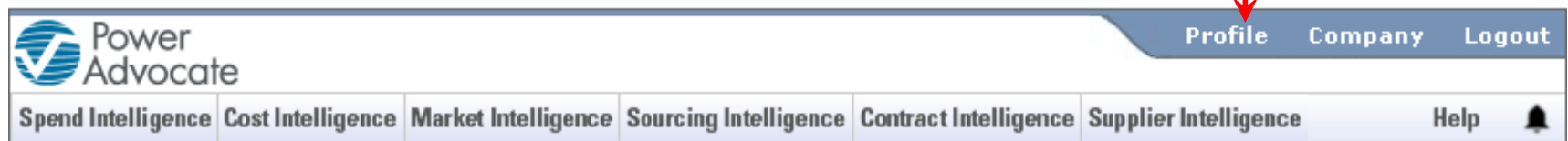


How do I log in to Sourcing Intelligence?

1. Launch a web browser and go to www.poweradvocate.com, and then click the orange **Login** button.
2. Enter your account **User Name** and **Password** (both are case-sensitive).
3. Click **Login**.



The login form is titled "PowerAdvocate - Login". It contains two input fields: "User Name:" and "Password:". To the right of each field is a link: "Forgot User Name" and "Forgot Password" respectively. Below the password field is a "Login" button, which is highlighted with a red rectangle. A red arrow points from the "Login" button in the list of steps to this button. Below the "Login" button is a link: "Frequently Asked Questions".



Your “Home” product’s Dashboard appears.

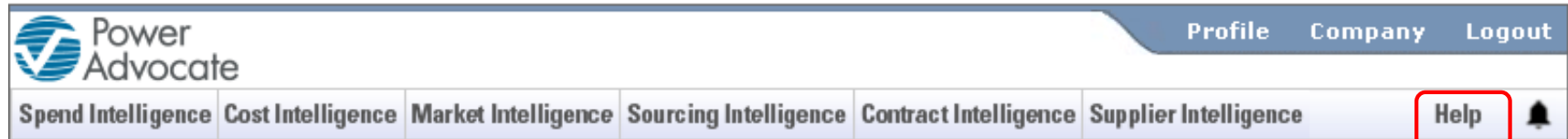
If Sourcing Intelligence is not your Home product, click **Sourcing Intelligence** on the navigation bar to display its Dashboard.

Tips

- PowerAdvocate functions in most web browsers; however, using browsers other than Internet Explorer (IE) version 11 or higher may cause certain functionality to work unexpectedly.
- To set your Home product, click **Profile** on the navigation bar, select a product in the **Product Information** section, and click **Update Information**. That product’s Dashboard appears first the next time you log in.

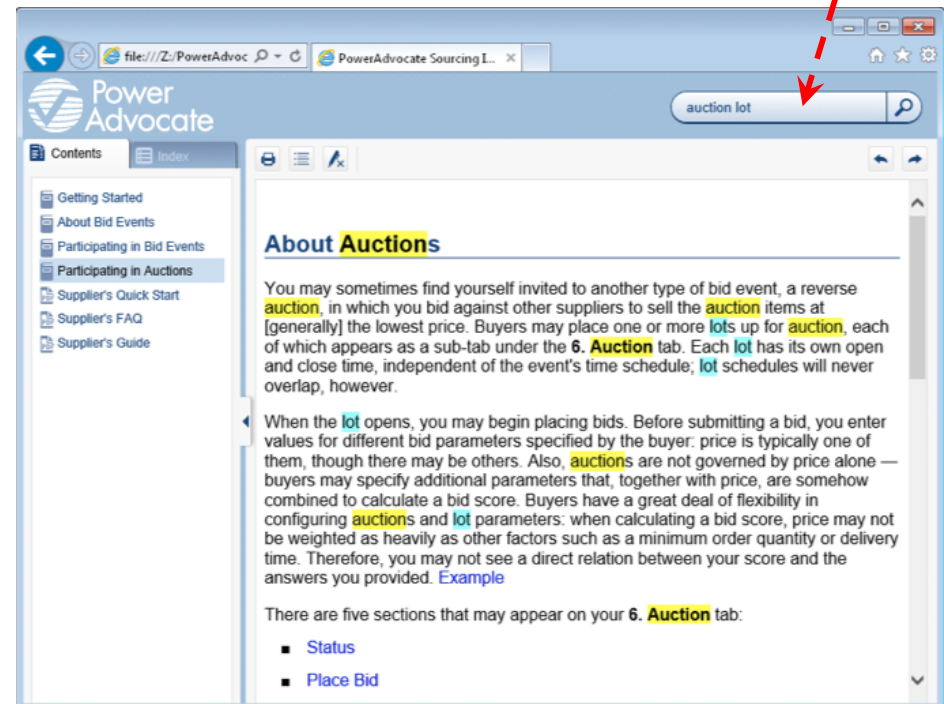
How do I get more information if I need it?

You can contact PowerAdvocate Support at support@poweradvocate.com or by calling **857-453-5800**, Monday through Friday (excluding U.S. Federal Holidays) from 8:00 AM to 8:00 PM Eastern Time



Online Help

- You can access the Help System at any time by clicking **Help** on the main navigation bar
- The Help System opens in a new window; use full-text search to get a ranked list of relevant help topics
- The Help System is fully navigable, with features such as search term highlighting
- You can download PDF versions of the documentation from within the Help System



What information is displayed on my Dashboard?

The Dashboard provides a roll-up view of all of your bid events grouped by state, plus additional customizations you add.

Search for events by title, number, items, and item subcategories by keyword

Create a New Event

Create a Custom Panel

Favorite Bid Events is a selection of events you choose to monitor

[Reports](#)

CREATE EVENT

ADD PANEL

My Favorite Bid Events

| Actions | Event # | Event Title | Status | Event Coordi... | Company | Close Time | Open Time | Event Ty |
|---------|-----------------------|----------------------------------|--------|--------------------------------|---------------|------------------|------------------|----------|
| ★ | 72229 | Quick Bid - TXUE | Open | Haase, Cath... | Power Utility | 07/27/2018 7:... | 07/27/2017 1... | RFx |
| ★ | 75174 | CC proj. EPC RFQ | Open | Haase, Cam... | Power Utility | 04/16/2018 5:... | 11/27/2017 5:... | RFx |

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Open Bid Events are active and open for bids

Open Bid Events

| Actions | Event # | Event Title | Event Coordin... | Company | Close Time | Open Time | Business Unit | Ev |
|---------|-----------------------|---------------------------------|---------------------------------|---------------|------------------|------------------|---------------|----|
| ★ | 40083 | Switch Land... | Deen, Kelley | Power Utility | 11/29/2020 4:... | 01/01/2018 8:... | | |
| ★ | 72229 | Quick Bid - ... | Haase, Cathe... | Power Utility | 07/27/2018 7:... | 07/27/2017 1... | | |
| ★ | 35512 | Substation D... | Haase, Cathe... | Power Utility | 07/13/2018 7:... | 07/13/2017 1... | | |
| ★ | 75174 | CC proj... | Haase, Camd... | Power Utility | 04/16/2018 5:... | 11/27/2017 5:... | | |

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Additional panels show **Pending**, **Post Bid**, **Completed**, and **Cancelled** events by default

Pending Bid Events

| Actions | Event # | Event Title | Event Coordin... | Company | Close Time | Open Time | Business Unit | Ev |
|---------|---------|-------------|------------------|---------|------------|-----------|---------------|----|
|---------|---------|-------------|------------------|---------|------------|-----------|---------------|----|

You can further customize those panels, or add your own

What are event states?

Each event passes through four basic event states from the time it is created until the time it is completed: **Pending**, **Open**, **Post Bid**, and **Completed** (a fifth state, **Canceled**, contains events canceled from the **Setup > Schedule** tab). Clicking an event's title from the Dashboard displays its **Status** tab. Buyers and suppliers may access corresponding **Pre-Bid**, **Bid**, and **Post Bid** tabs if appropriate for the event state.



Pending

An event is considered *Pending* from the time the Bid Event Coordinator (BEC) first creates it to the time it opens. The **Setup** tab is the main focus in this phase; suppliers cannot view the details of Pending events. If the BEC requires a *Pre-Bid* period, suppliers can access **Pre-Bid** tabs to retrieve files that you post, and to post their responses before the bid opens. Supplier responses are posted on your **Submittals > Pre-Bid** tab.

Open

Once the event is *Open*, the BEC's role shifts to event management via the **Status** tab. Events are visible to suppliers as soon as they are attached to the event via the **Setup > Suppliers** tab, but they must wait until the event opens before they can begin downloading the RFx, filling out datasheets, etc. (suppliers *can* upload before the event opens). If there was a Pre-Bid period, suppliers cannot access their **Bid** tabs (regardless of when the bid opens) until the BEC changes their Approval Status to **Approved** from the **Setup > Suppliers** tab.

Post Bid

An event enters the *Post Bid* state when it reaches its Close time. At that time buyers can review suppliers' final submittals before making awards. The BEC can enable a *Post Bid* period to exchange additional documents with selected suppliers, create additional rounds of bidding, or evaluate suppliers.

Completed

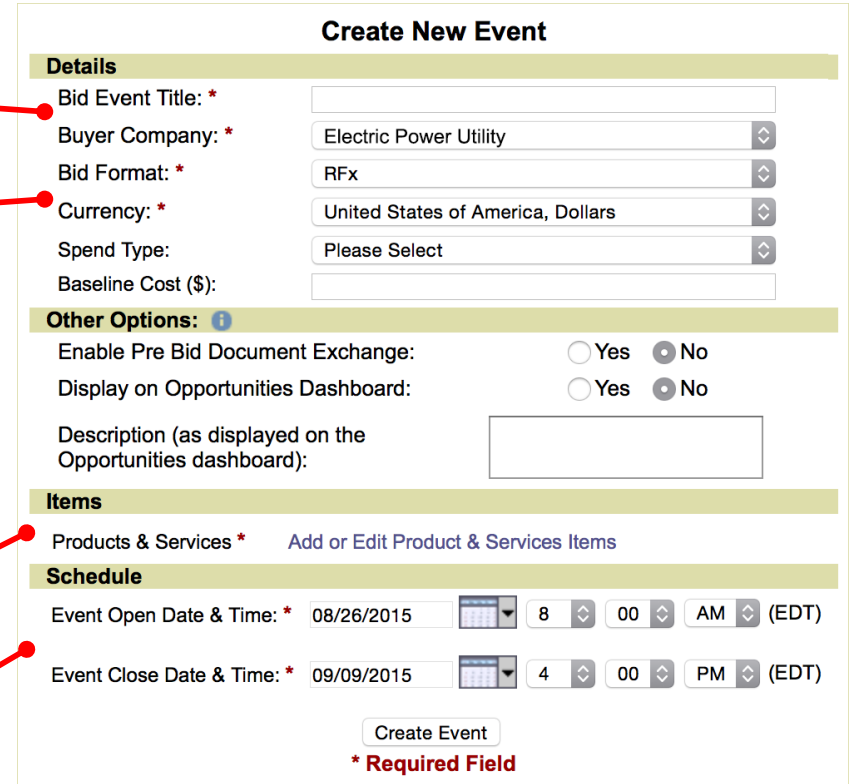
An event is *Completed* once the BEC finalizes awards (or selects "no award"), from the **Awards** tab; the catalog of Completed events is maintained primarily for reference. If you subscribe to PowerAdvocate Contract Intelligence, the **Contracts** tab allows you to create contracts from within the event.

How do I create an event?

1. From the Dashboard, click **Create Event**.
2. Enter a **Bid Event Title**, **Bid Event Number**, and select a **Buyer Company** (usually your own).
3. Select a **Bid Format** and **Currency**.
4. Complete any remaining Details fields as required by your company.

You may also enable a Pre-Bid period, and make the event visible to all PowerAdvocate suppliers via the Opportunities Dashboard.

5. Click **Add or Edit Products & Services Items** and select at least one item being purchased.
6. Select the event's **Open** and **Close** schedule.
7. Click **Create Event**.



Create New Event

Details

Bid Event Title: *

Buyer Company: *

Bid Format: *

Currency: *

Spend Type:

Baseline Cost (\$):

Other Options: ⓘ

Enable Pre Bid Document Exchange: ☐ Yes ☒ No

Display on Opportunities Dashboard: ☐ Yes ☒ No

Description (as displayed on the Opportunities dashboard):

Items

Products & Services * [Add or Edit Product & Services Items](#)

Schedule

Event Open Date & Time: * 08/26/2015 8 00 AM (EDT)

Event Close Date & Time: * 09/09/2015 4 00 PM (EDT)

* Required Field

Tips

- The default Event Open date is 1 week from event creation at 8:00 AM and the default Event Close date is 2 weeks later at 4:00 PM; you set your time zone on your User Profile page.
- You can schedule additional milestones and activities from the **Setup > Schedule** tab.
- If schedules are changed, you should notify suppliers via the **Status** tab.

What are the different types of events/bid formats?

There are three basic types of events, characterized by the bid format:

RFx

- RFx (a reference to RFPs, RFQs, and RFIs) is the most common event format.
- You post your requirements for the products and services you wish to purchase, and receive bid packages from your suppliers.
- You can view bid progress and supplier submittals throughout the course of an event — since you can work with suppliers during the event, RFx events usually produce more complete bids than Sealed Bid events.

Sealed Bid

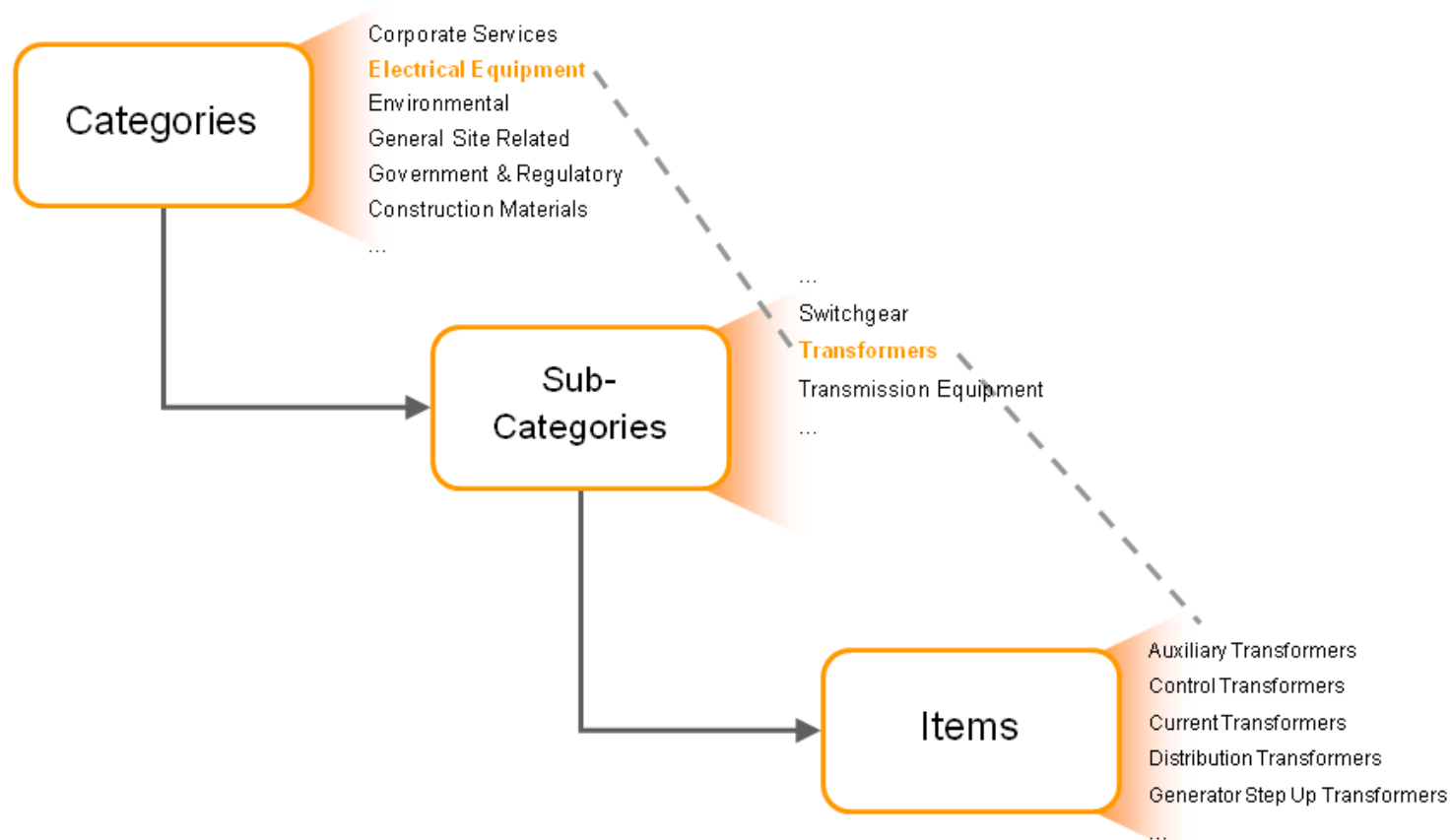
- Setup is similar to RFx.
- The buyer team cannot review suppliers' submittals until after the event closes.
- Because you cannot monitor suppliers' documents as they are submitted, Sealed Bid events generally require more clarification cycles after the event closes (vs. RFx events).

[Reverse] Auction

- You configure individual lots of items (products and services) you wish to purchase, and receive suppliers' bids in real time. Bids start high and move lower.
- Auctions require a great deal of up-front preparation, though the results can be dramatic if used on appropriate items in fiercely competitive markets.
- Each lot can be configured independently, with different suppliers participating, different formats, etc.
- Auction items are most often commodities where price is the major factor and brand plays a limited role.
- You can create a simple "lowest price wins" auction, or make it as complex as your needs dictate. Auctions need not be governed by price alone — for instance, you can specify additional parameters that might weight the bid score more heavily towards suppliers with low minimum order quantities and short lead times. The documentation contains detailed examples of configuring auction lots.

What is the PowerAdvocate item directory?

PowerAdvocate Sourcing Intelligence uses a three-tier item directory (or schema) consisting of categories, sub-categories, and items. You must attach at least one item or subcategory to each event – this data helps when searching for or filtering events, filtering the supplier database, working with Technical datasheets, and computing metrics. Market Intelligence uses the same directory when creating Categories to use as search filters.



How do I select items?

There are two places to attach items to an event in Sourcing Intelligence:

Products and Services
Select the Product and/or Service Items being sourced in this event.

Drill-Down Search Search

| Category | Subcategory | Item |
|--|----------------------------|-------------------|
| Industrial (9) | Air Handling and HVAC (23) | Appliances, Parts |
| Equipment, Electrical (22) | Air Quality Control (2) | |
| Equipment, Instrumentation and Controls (19) | Appliances (1) | |
| Equipment, Mechanical (40) | Boilers and Furnaces (38) | |
| Equipment, Office and Other (6) | Centrifuges (2) | |
| | Chemical Feed Systems (4) | |

V Select V

Your Selections (2)

| Category | Subcategory | Item | Remove |
|-----------------------|-------------|-------------------|--------|
| Equipment, Mechanical | Appliances | Appliances, Parts | X |
| Equipment, Mechanical | Parts | | X |

Save and Close Cancel

When creating an event, you must add at least one item:

1. From the Create Event page, click **Add or Edit Products & Services Items**.
2. Browse the item directory from the **Drill-Down** tab, or find specific items on the **Search** tab.
3. Select a Subcategory or Item and click **v Select v** to add it to your list.
4. Click **Save and Close**.

After an event is created, you can add/modify items from the **Setup > Items** tab:

1. Click on categories or subcategories to drill down into the directory, or use the **Search** field.
2. Select one or more items; you can modify descriptions if necessary.
3. Click **Add Item**.

Selected Item(s) Update Description(s)

| Item | Description | Actions | Primary |
|---|-----------------|---------|----------------------------------|
| Commodities and Supplies > Materials, Other > Other Materials | Other Materials | | <input type="radio"/> |
| Equipment, Mechanical > Parts > Parts | Parts | | <input checked="" type="radio"/> |

Search: Search

Categories

| | |
|--|--|
| Buildings: Concrete, Doors and Windows, Finishes, Flooring, Foundations, Mechanical, Pre-Fabricated, Roofing and Walls, ▶ | Commodities and Supplies: Bearings, Catalyst, Chemicals, Process, Fasteners, Fuel, General, Industrial and Construction Materials, Laboratory, ▶ |
| Equipment, Construction and Industrial: Containers, Drilling Equipment, Hydraulic Systems, Loaders, Sand Blasting Equipment, Sanders, Scaffolding, ▶ | Equipment, Electrical: Batteries and Chargers, Bus Duct and Busbar, Cable, Cathodic Protection, Components, Controls, Electrical, ▶ |
| Equipment, Instrumentation and Controls: Analysis Equipment, Compressed Air Systems, Controls, Electrical Instruments, Flow Instruments, Gauges, ▶ | Equipment, Mechanical: Air Handling and HVAC, Air Quality Control, Appliances, Boilers and Furnaces, Centrifuges, Chemical Feed Systems, ▶ |
| Equipment, Office and Other: Communication Equipment, Computer Equipment, Exercise Equipment, Maintenance Equipment, Office Equipment, Vehicles | Nuclear: Instrumentation, Nuclear Fuel, Protective Supplies, Radiation Monitoring Equipment, Reactor Components, Services, ▶ |
| Piping and Valves: Gas Meters, Hose, Nozzles, Piping, Piping Accessories, Valve Accessories, Valves | Services: Administrative Services, Construction Services, Engineering, Inspection and Expediting, ▶ |

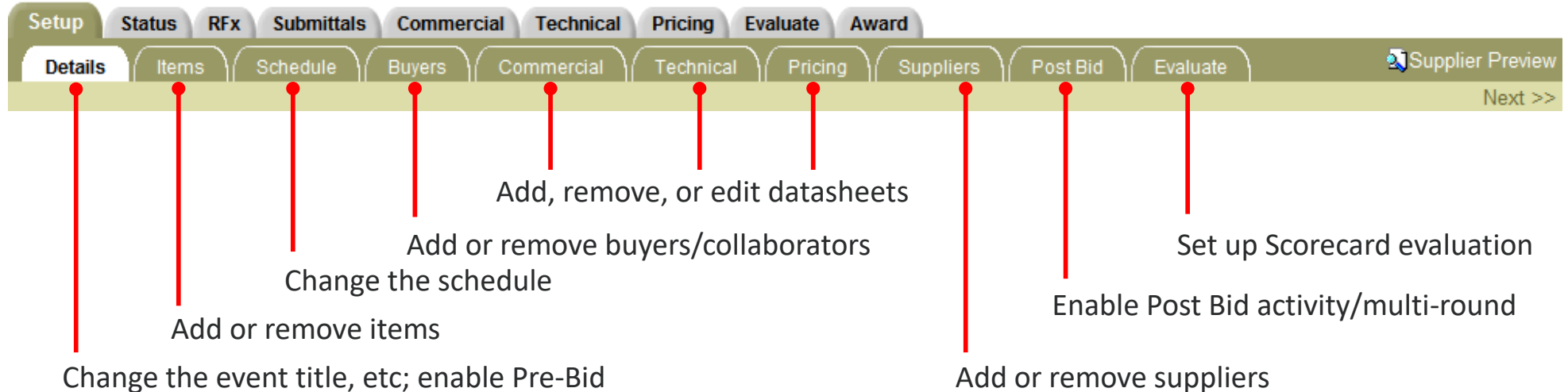
What else is involved in event setup?

The pages that follow illustrate a sample workflow. Generally, the **Setup** sub-tabs on the bottom row are for configuring an event before it opens, and the tabs across the top are for managing events in progress.

Once an event has been created, the remaining setup can be done *in any order*, and virtually all event configuration settings can be changed *on the fly, at any time*.

Distribution Transformer

Open: 11/17/06 08:00:00 AM EST Close: 12/01/06 04:00:00 PM EST



Tips

- Settings from the Create Event page appear on the Details, Items, and Schedule tab should you need to modify them.
- Certain limitations exist to maintain a fair and consistent process.
- The **Post Bid** and **Evaluate** sub-tabs are not used until after the event closes. An additional **Auction** tab appears for Auction events.

How do I set up my buyer team?

1. Go to the **Setup > Buyers** tab.

Buyer Database Search

Companies **Groups**

Electric Power Utility

Type here to search or click 'Show All' Show All

Buyers:

Add to Event ->

Selected Buyers

| User / Group | Bid Event Role | Company | Invited | Remove |
|------------------------|--------------------------|------------------------|------------------|--------|
| Cindy Walsh | Bid Event Coordinator | Electric Power Utility | - | |
| William Brady | Buyer Representative (P) | Electric Power Utility | Notify | |
| Mary Tate | Buyer Engineer (P) | Electric Power Utility | 10/29/06 | |
| Edgar Fayette | Buyer Representative (P) | Electric Power Utility | 10/26/06 | |
| Camden Haase (ckhaase) | | Electric Power Utility | Pending Approval | - |

2. Search for and select users or groups to invite.

3. Click **Add to Event**.

4. Click **Notify** at the top of the Selected Buyers pane to invite all buyers at once, or invite them individually by clicking **Notify** in the **Invited** column.

Tips

- To view all buyers at a company, click **Show All**. If you cannot find a particular buyer, click [add user](#) and invite them.
- You can add multiple buyers at once; click to remove one from the Selected Buyers list.
- You (the event creator) become the Bid Event Coordinator (BEC), and have complete access to the event. Other team members have assigned roles that define their permissions for this event. You can reassign roles (including the BEC role) as necessary.

What do roles mean within Sourcing Intelligence?

- The PowerAdvocate platform uses role-based permissions to control each user's level of access.
- Each user is assigned a Primary Role that specifies:
 - Which events the user can access
 - The screens/tabs that the user can access within an event
 - The user's access level (view-only, edit, delete, etc.)
- There are several user roles, with varying levels of access:
 - Buyer Manager
 - Advanced Buyer
 - Buyer
 - Buyer Representative
 - Buyer Engineer
 - Other company-specific roles
- The BEC can also assign event-specific roles to users, which take precedence in granting higher or lower access rights.
- PowerAdvocate typically controls company and user permissions
 - All new 'buyer' users are assigned to the Buyer Representative role by default
 - All 'supplier' users are assigned the Supplier Representative role by default
 - Call PowerAdvocate to configure a user's primary role
- PowerAdvocate can also configure new roles with customized permissions to suit your needs.

Can someone “fill in” for me as the BEC of my event?

You can change buyer roles (including the BEC role) as necessary – *the new role applies to this event only.*

| Selected Buyers | | | | ✉ Notify |
|-----------------|--------------------------|------------------------|----------|----------|
| User / Group | Bid Event Role | Company | Invited | Remove |
| Cindy Walsh | Bid Event Coordinator | Electric Power Utility | - | ✕ |
| William Brady | Buyer Representative (P) | Electric Power Utility | Notify ✉ | ✕ |
| Mary Tate | Buyer Engineer (P) | Electric Power Utility | 10/29/06 | ✕ |

1. From the **Setup > Buyers** tab, click a user's **Bid Event Role**.
2. Select a new role for the user.
Click a role name to preview its access permissions.
3. Click **Submit**.
4. Confirm the change and click **Submit**.

Mary Tate with **Electric Power Utility** has a Primary Role of **Buyer Engineer**.
This role/company has access to the following screens for this event only:

| Role: Buyer Engineer (Electric Power Utility) | |
|---|--|
| Screen Access | Comment |
| Setup | |
| Status | ✓ |
| RFX | ✓ |
| Submittals | ✓ |
| Commercial | ✓ |
| Technical | ✓ |
| Pricing | Partial Access (Pending, Open Events Only) |
| Auction | ✓ |
| Post Bid | ✓ |
| Evaluate | ✓ |
| Award | |

You may change this user's role for this event by selecting the appropriate role below.

Roles For this Event Only: *

- ☒ Do Not Change Role: Buyer Engineer
- ☐ Change Role To: Buyer Representative
- ☐ Change Role To: Bid Event Coordinator

To change this user's role for all events or create a new role, contact your platform administrator.

Submit **Cancel**

*Required Field

You have chosen to change the role of **Mary Tate** (Electric Power Utility) from **Buyer Engineer** to **Bid Event Coordinator (BEC)** for this event only.

This means that **Cindy Walsh** with **Electric Power Utility** will no longer be the **Bid Event Coordinator** and will be assigned to the Primary Role of **Buyer Manager** for this event.

Send **Emails** to Former and Future BEC:

| Former BEC | Future BEC |
|--------------------------------------|------------------------------------|
| <input type="checkbox"/> Cindy Walsh | <input type="checkbox"/> Mary Tate |

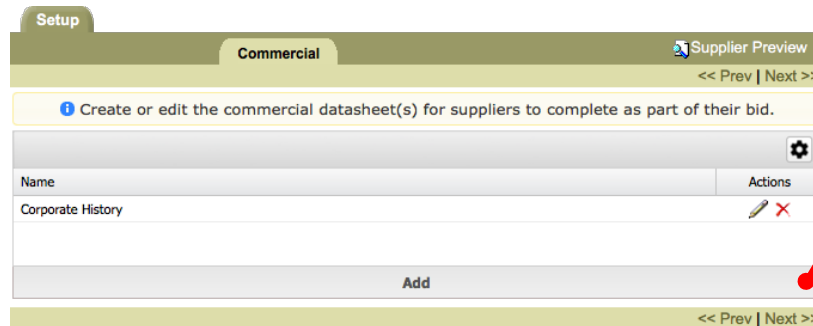
Back **Submit** **Cancel**

Tips

- Confirmation screens allow you to send notification emails to you and the new BEC.
- Roles can be changed back, or further modified at any time, by the new BEC.

How do I create a datasheet? (1 of 2)

1. Go to the **Setup > Commercial, Technical, or Pricing** tab.



Setup

Commercial

Supplier Preview

<< Prev | Next >>

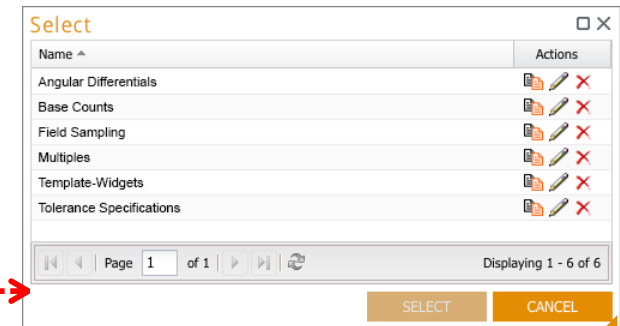
Create or edit the commercial datasheet(s) for suppliers to complete as part of their bid.

| Name | Actions |
|-------------------|---------|
| Corporate History | |

Add

<< Prev | Next >>

2. Click **Add**.



Select

| Name | Actions |
|--------------------------|---------|
| Angular Differentials | |
| Base Counts | |
| Field Sampling | |
| Multiples | |
| Template-Widgets | |
| Tolerance Specifications | |

Page 1 of 1

Displaying 1 - 6 of 6

SELECT CANCEL

3. Do one of the following:

- To copy an existing datasheet, select it and click **Select**
- To copy an existing datasheet to an event and open it for editing, click
- To edit an existing datasheet, select it and click

Tips

- Datasheets are forms for collecting information; an event may have many datasheets, one, or none at all.
- You can display suppliers' submittals side-by-side or export the data to an Excel spreadsheet for further manipulation.
- An alternative to datasheets is posting documents on the event's **RFx** tab for suppliers to download, fill in, and upload to the **Submittals** tab.

How do I create a datasheet? (2 of 2)

Datasheet Builder:

The Datasheet builder has three main components:

- The left column contains a selection of Fields you can use in a datasheet
- The center column is a “canvas” for datasheet layout (and a field for the datasheet)
- The right column contains Configuration options for the selected field.

The screenshot shows the 'Select' panel on the left with a list of field types: Label, Short Answer, Long Answer, Dropdown, Radio, Checkbox, Date, File Upload, Calculation, Block, Table, and Yes/No. The center canvas, titled 'Simple Calculation', contains a form with fields for 'Room 1 Length', 'Room 1 Width', 'Room 1 Area', 'Room 2 Length', 'Room 2 Width', 'Room 2 Area', and 'Total Area'. The 'CONFIGURATION' panel on the right shows settings for the selected 'Room 1 Length' field, including font style (B, I, U), font face (Arial), font size (12), required status, text display options, format (Number), and decimal places (2). At the bottom are buttons for 'IMPORT FROM EXCEL', 'SAVE', 'CANCEL', 'COPY FIELD', and 'DELETE FIELD'.

The 'Field Samples' panel displays examples of different field types and their configurations. It includes sections for 'Labels can be used for headings or explanatory text', 'Block with free-form entry fields' (showing short and long answer fields), 'Block with selector fields' (showing radio, dropdown, and checkbox options), 'Date fields provide a calendar control', and 'File Upload fields enable file attachments'. It also shows a table with two columns and two rows, and a section for 'Calculation fields allow you to use formulas on answers from other fields'. At the bottom are 'SAVE' and 'CANCEL' buttons.

To add a field, click and drag it from the left column to the canvas.

Once added to the canvas, you can click a field to access its configuration options, click a different field type to change it, click and drag the field to move it, or click and drag the orange triangle to resize it.

How do I invite suppliers to participate in an event?

1. Click the **Setup > Suppliers** tab.

2. Search for and select suppliers by company, person, items sold, or a list of your favorite suppliers.

3. Leave the default **(New Bid Team)** to create a new team, or select an existing bid team.

4. Click **Add to Event**.

5. Click **Notify** at the top of the Selected Supplier Teams pane to invite all suppliers at once, or invite them individually by clicking **Notify** in the **Invited** column.

The screenshot shows the Power Advocate interface with the 'Suppliers' tab selected. The 'Supplier Database Search' pane on the left has a search bar with 'ero' entered. Below the search bar, a list of suppliers is shown, including 'Aeron Engineering', 'Abbott, Irene (abbot)', 'Deen, Kelley (kdeen)', 'McGrath, Lou (lou)', 'See, Tori (tori_see)', and 'Heron's Nest Components'. The 'Add to Event ->' button is highlighted with a red box. The 'Selected Supplier Teams' pane on the right shows two teams: 'Aeron Engineering' and 'Elsbeth International'. Each team has a table of suppliers. The 'Notify' button at the top of the 'Selected Supplier Teams' pane is highlighted with a red box. The 'Invited' column in the 'Aeron Engineering' table has a 'Notify' button highlighted with a red box. The 'Invited' column in the 'Elsbeth International' table has a 'Notify' button highlighted with a red box. A red arrow points from the 'Add to Event ->' button to the 'Selected Supplier Teams' pane.

| Supplier Database Search | | | | |
|---|--------|-------|-------|----------|
| Companies | People | Items | Lists | Requests |
| ero Search results display after entering three characters. | | | | |
| Suppliers: | | | | |
| <input checked="" type="checkbox"/> Aeron Engineering Hide Users Add User | | | | |
| <input type="checkbox"/> Abbott, Irene (abbot) | | | | |
| <input checked="" type="checkbox"/> Deen, Kelley (kdeen) | | | | |
| <input checked="" type="checkbox"/> McGrath, Lou (lou) | | | | |
| <input type="checkbox"/> See, Tori (tori_see) | | | | |
| <input type="checkbox"/> Heron's Nest Components Show Users | | | | |
| (New Bid Team) Add to Event -> | | | | |
| Create New Company | | | | |

| Selected Supplier Teams | | | |
|--------------------------------------|--------------|-------------------------------|---------|
| Aeron Engineering | | | |
| Approval Status: Approved | | Bid Intention: Bidding | |
| Aeron Engineering | | ☆ | Invited |
| Deen, Kelley | 858-555-0042 | 👤 | Notify |
| McGrath, Lou | 617-555-1000 | 👤 | Notify |
| Portico Steel | | D | Invited |
| Evans, Lori | 800-555-3424 | 👤 | Notify |
| Elsbeth International | | | |
| Approval Status: Not Approved | | Bid Intention: Bidding | |
| Elsbeth International | | ☆ | Invited |
| Berlioz, Marie (!) | | 👤 | 2/14/08 |
| Piernot, Elsbeth | 888-555-9191 | 👤 | Notify |

Tips

- If you cannot find a particular supplier contact, click [add user](#) and invite them to register. If you can't find a particular supplier, click **Create New Company**.
- Supplier teams can be noted as **Invited**, **Bidding** or **Declined** via pull-down; Supplier teams or individual supplier contacts can be added or removed (click) at any time.
- If you subscribe to Market Intelligence, a **Lists** tab provides direct access to your custom supplier lists.

How do I run a Pre-Bid Document Exchange?

When creating an event or configuring event details (**Setup > Details** tab, for an event that has not yet opened), you have the option to require a Pre-Bid Document Exchange:

Other Options: ⓘ

Enable Pre Bid Document Exchange:

☐ Yes ☒ No

A Pre-Bid Document Exchange allows you to post RFx documents to the **RFx > Pre-Bid** tab, which suppliers can download from their **1. Download RFP > Pre-Bid** tab before the event opens. Likewise, suppliers can upload responses to their **2. Upload Proposal > Pre-Bid** tab that appear on your **Submittals > Pre-Bid** tab.

Furthermore, regardless of whether the event is Open or not, suppliers cannot see their **1. Download RFP > Bid** or **2. Upload Proposal > Bid** tabs until you explicitly approve them to participate in the bid event once it is Open.

To approve a supplier for a bid event:

1. Open the event and go to the **Setup > Suppliers** tab.
2. In the **Selected Supplier Teams** pane, set the team's Approval Status from Pending Approval to **Approved**.

The supplier can then access the Bid sub-tabs (though they cannot download documents from their **1. Download RFP > Bid** tab until the event opens)

Selected Supplier Teams Notify

Aeron Engineering ✎ ✕

Approval Status: **Approved** Bid Intention: **Bidding**

| Aeron Engineering | | ☆ | Invited | |
|-------------------|--------------|---|----------|---|
| Deen, Kelley | 858-555-0042 | 🌐 | Notify ✉ | ✕ |
| McGrath, Lou | 617-555-1000 | 🌐 | Notify ✉ | ✕ |
| Portico Steel | | ☆ | Invited | |
| Evans, Lori | 800-555-3424 | 🌐 | Notify ✉ | ✕ |

Elsbeth International ✎ ✕

Approval Status: **Not Approved** Bid Intention: **Bidding**

| Elsbeth International | | ☆ | Invited | |
|-----------------------|--------------|---|----------|---|
| Berlioz, Marie (!) | | 🌐 | 2/14/08 | ✕ |
| Piernot, Elsbeth | 888-555-9191 | 🌐 | Notify ✉ | ✕ |




Tip

- If you choose not to approve a team, setting their Approval Status to **Not Approved** is optional (e.g., for your reference only), as they cannot access the bid event unless they have an **Approved** status.

How do I open my event to other suppliers?

When creating an event, you have the option to display the event on the Opportunities Dashboard, which all PowerAdvocate suppliers can view on their Opportunities tab.

Suppliers can view only high-level event details (title, products/services, open & close dates) and any additional description you provide — suppliers must request access to the event, which you must approve before they can view and participate in the event itself.

| Events | | Opportunities | | | | |
|--|-------------------------|-------------------|-----------------------|------------------------|------------------------|---|
| Opportunities Dashboard | | | | | | |
| | Event Title | Company | Products / Services | Open Date | Close Date | Accessible |
| + | Actuators | Acme Electric | Controls | 08/18/2015 8:00 AM EDT | 08/31/2015 4:30 PM EDT |  |
| - | Next-Gen Boiler Upgrade | Universal Energy | Boiler Components | 08/15/2015 8:00 AM EST | 12/31/2015 4:00 PM EST |  |
| Description: Looking for a cutting-edge implementation for a green building in the planning stages. | | | | | | |
| + | Project Simulator | Solar Arrays LLC | Construction Services | 08/01/2015 8:00 AM EDT | 09/07/2015 4:00 PM EDT | Pending |
| + | Site 101 Rough-out | Sheridan Builders | Piping | 07/01/2015 9:00 AM EDT | 12/31/2015 6:00 PM EST |  |

To post an event to the Opportunities Dashboard:

1. In the **Options** section of the **Setup > Suppliers** tab, set Display on Opportunities Dashboard to Yes.
2. Click **Okay** to confirm that you are making your event visible to all suppliers.
3. Enter a **Description** to help suppliers evaluate if they are a potential fit.
4. Click **Save**.
5. Review the Supplier Access Requests tab (via **Setup > Suppliers**) periodically to approve or deny any access requests you may receive from interested suppliers.

Other Options:

Enable Pre Bid Document Exchange:

☐ Yes ☒ No

Display on Opportunities Dashboard:

☐ Yes ☒ No

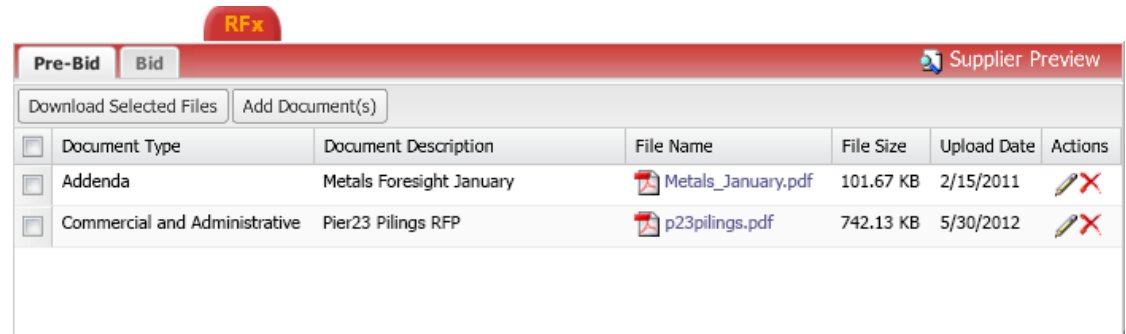
Description (as displayed on the Opportunities dashboard):

How can I include my standard T&Cs in an event?

There are 3 different ways to include your Terms and Conditions in an event.

Method 1

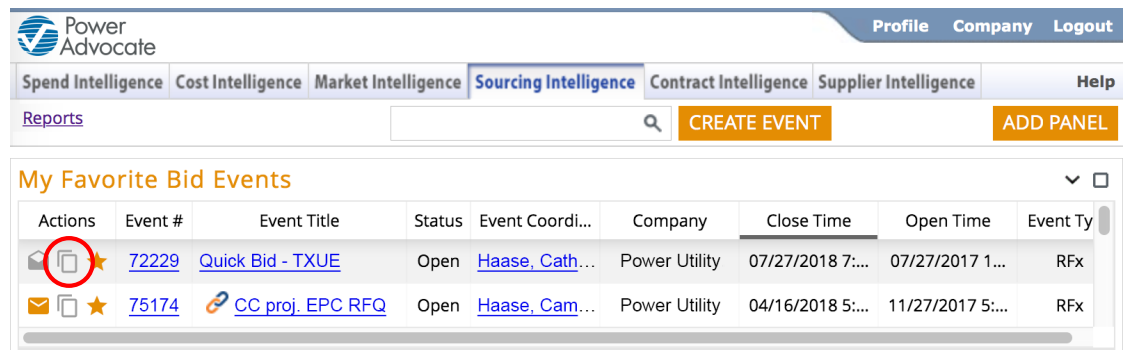
Upload Ts&Cs documents to the event's **RFx** tab for suppliers to fill out and then upload to the **Submittals** tab – good when using MS Office documents so reviewers can mark up changes.



| Document Type | Document Description | File Name | File Size | Upload Date | Actions |
|-------------------------------|--------------------------|--------------------|-----------|-------------|---------|
| Addenda | Metals Foresight January | Metals_January.pdf | 101.67 KB | 2/15/2011 | |
| Commercial and Administrative | Pier23 Pilings RFP | p23pilings.pdf | 742.13 KB | 5/30/2012 | |

Method 2

Create a **Base Event** to use as a template (with your standard documents, datasheets, etc.), and create new events by copying that base event – this is more efficient method than #1, especially with multiple documents.

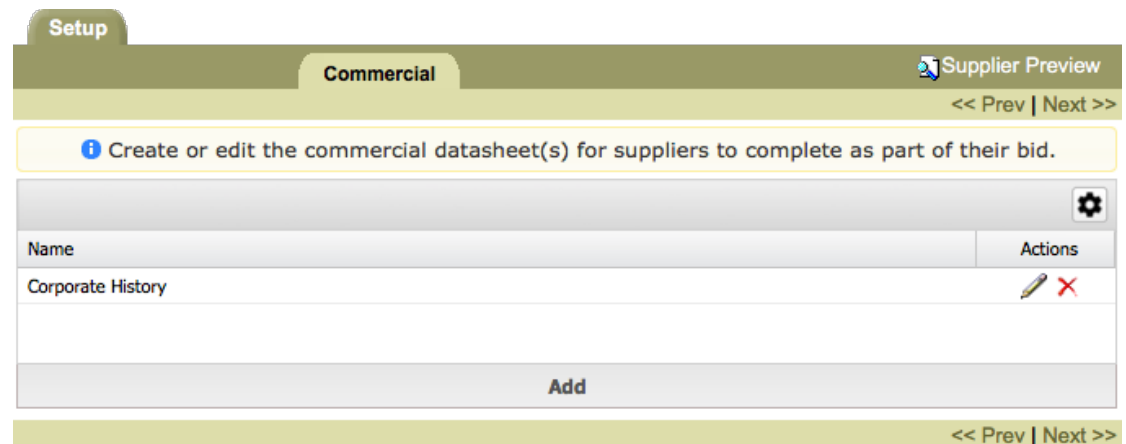


| Actions | Event # | Event Title | Status | Event Coord... | Company | Close Time | Open Time | Event Ty |
|---------|---------|------------------|--------|----------------|---------------|------------------|------------------|----------|
| | 72229 | Quick Bid - TXUE | Open | Haase, Cath... | Power Utility | 07/27/2018 7:... | 07/27/2017 1:... | RFx |
| | 75174 | CC proj. EPC RFQ | Open | Haase, Cam... | Power Utility | 04/16/2018 5:... | 11/27/2017 5:... | RFx |

Method 3

Use a Commercial datasheet template and add it to the event – best when you need suppliers to agree to each term separately; an additional datasheet can collect exceptions.

Also useful when you have multiple short-answer or multiple choice questions, as you can compare all suppliers' answers side-by-side.

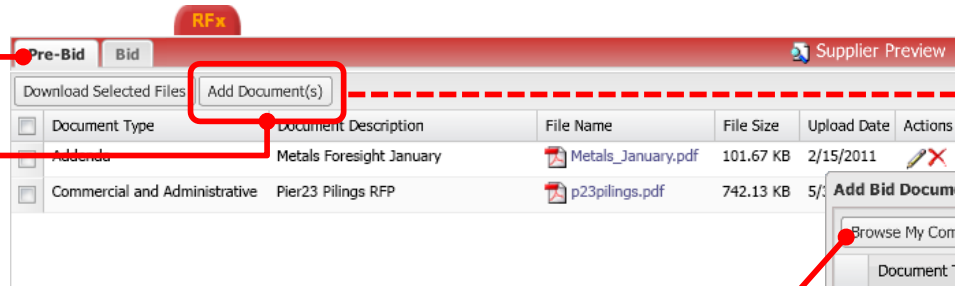


| Name | Actions |
|-------------------|---------|
| Corporate History | |

How do I attach bid documents to an event?

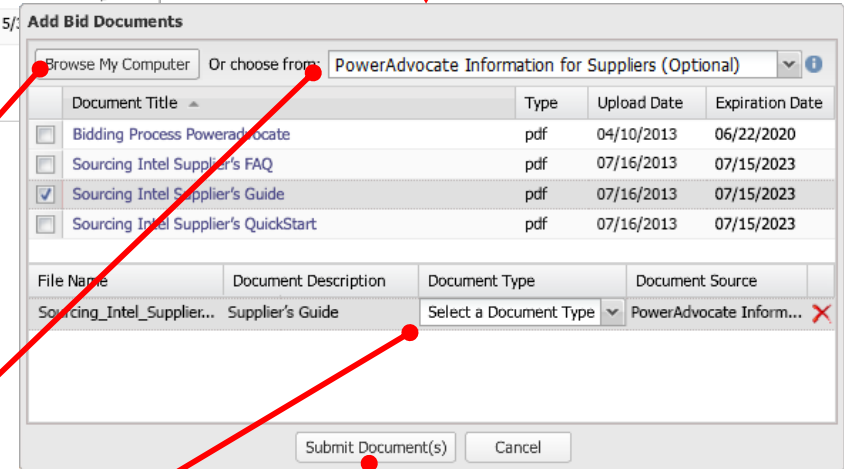
1. Click the event's **RFx** tab and select a sub-tab as appropriate.

2. Click **Add Documents**



3. Select the documents to add:


- To add documents from your computer/network, click **Browse My Computer**, find the document, and click **Open**.
- To add Knowledge Documents, select a list to choose from and then check each document you wish to add.



4. Select a **Document Type**.

5. Click **Submit Document(s)**.

Tips

- You can add, modify (✎), or delete (✖) documents at any time before the event closes.
- There is no limit on the number or size of documents that you can upload; multiple files can also be compressed into a .zip archive for upload.
- Click  **Supplier Preview** to navigate through the event tabs as appear to your suppliers.

Can I use a previous event as a template for a new event?

1. From the Dashboard, click **Copy Event**.
2. Select **Events I Coordinated** to list events for which you were the BEC, or **All Events I Have Access To**.
3. Select an event to copy.
4. Click **Copy Event**.
5. Enter a new **Bid Event Title**.
6. Configure the event – you can copy documents, datasheets, supplier teams, etc. into the new event.
7. Click **Copy Event**.
8. Review your event settings on the Validate Event Details page and then click **Copy Event**.

Copy Existing Event

Copy an existing event by selecting the Event title and clicking the *Copy Event* button. If you do not know the name of the event, click *Search for Event to Copy*.

Event Display Settings

Show in List: ☒ Events I Coordinated ☐ All Events I Have Access To

Sort By: ☒ Event Title ☐ Close Date

Event List

The following list of events changes based on your selections above.

Event Title (Close Date):

- Select an event to copy
- 230 First St. HVAC (06/02/2006)
- Aaron Landers Hall (11/30/2005)
- Elk Creek Causeway (07/03/2006)
- Manning House (09/13/2006)
- Pier 23 Pilings (04/25/2006)
- Pier 24 Pilings (04/25/2006)
- Wldgets and Gizmos (06/23/2006)
- Zackay Crossing (02/02/2007)

Copy Event Cancel Search for Event to Copy

Details

Details

Bid Event Title: * Enter Bid Title...

Buyer Company: * Electric Power Utility

Bid Format: * Sealed Bid

Currency: * United States

Classification

Event Sub-Category: * Equipment, Electrical > Transformers

Business Unit: Select Business Unit

Baseline Cost (\$):

Items

Schedule

Bid open and close times have been suggested based on the duration of the copied bid and established rules. These can be changed by clicking the calendar below or can be edited later.

Suggested Event Open: * 11/08/2006 8:00 AM

Original Open: 07/20/2006 8:00 AM

Suggested Event Close: * 12/08/2006 4:00 PM

Original Close: 08/17/2006 3:05 PM

Datasheets Copy All Datasheets? ☒

Suppliers Attach Same Suppliers? ☐

RFx Documents Copy All Documents? ☐

Back **Copy Event** Cancel

Tips

- The Details, Items, and Schedule sections always appear; others may appear based upon your permissions and event access.
- The new/copied event is completely independent of the original.

How do I search for events?

Enter search terms in the field at the top of the Dashboard and click **Search Events**.

You can Search for events by title, number, items, and item subcategories by keyword
















Legacy Dashboard

concrete repair

Search Events

Back to Dashboard






Create Event

| Actions | Event Title | Company | Event Coordinator | Status | Format | Close Time ▼ |
|---|---|------------------------|-------------------|-----------|--------|------------------------|
|    | RFP No. 2534 BW1 Concrete Repair | Electric Power Utility | FISK, ED | Completed | RFx | 02/12/2014 6:00 PM EST |
|    | Concrete Repair Services | Electric Power Utility | HAASE, CAMDEN | Completed | RFx | 08/30/2013 7:00 PM EDT |
|    | Trickling Filter 1 Concrete Repair | Electric Power Utility | DEEN, KELLEY | Post Bid | RFx | 09/14/2011 3:00 PM EDT |
|    | Trickling Filter/First Stage Structura... | Electric Power Utility | TATE, MARY | Post Bid | RFx | 07/20/2011 6:00 PM EDT |
|    | FSRC - Warehosue Concrete Repairs | Electric Power Utility | DEEN, KELLEY | Post Bid | RFx | 08/06/2010 4:00 PM EDT |

Page 1 of 1


Displaying 1 - 5 of 5

On the search results page:



- For events you can access:
 - ▶ Click  to display a preview, or the click the event title to open it
 - ▶ Click  to copy the event
 - ▶ Click  to favorite an event
- For other events:
 - ▶ Click  or the event title to display a [limited] preview
 - ▶ Click  to request access from the event's coordinator

How do I communicate with my Buyer and Supplier teams?

Your company uses one of the following messaging options in Sourcing Intelligence:

- **PowerAdvocate Messaging** – Click  within an event to create a new message via PA Messaging.
- **Standard email** – Click an  icon to create a new message in your default email application.

To create a message with PowerAdvocate Messaging:

1. Click the event's **Messaging** tab, any  /  in the **Actions** column on the Dashboard.
2. Click **Create New Message**.

| Event # | Title | Company | Msg | Bid Coordinator | Format | Close Time | Open Time |
|---------|----------------|------------------------|------|-------------------------|--------|---------------------------|---------------------------|
| 1998-01 | Grid Expansion | Electric Power Utility | 3/13 | Ed Fisk 781-555-8191 | RFx | 06/15/2006 4:00 PM EDT | 06/01/2006 8:00 AM EDT |
| 7749 | Elevators | Electric Power Utility | | Ed Fisk 781-555-8191 | RFx | 06/17/2007 4:00 PM EDT | 12/12/2006 8:00 AM EST |

Setup Status RFx Submittals Commercial Technical Pricing **Messaging**

Supplier Preview Spreadsheet

Create New Message Search Inbox: Search Send email notifications? ☒ Yes ☐ No

Inbox (3) New/Unread (1)

| Status | Date | From | Company | Subject | Actions |
|--|-------------------------|-------------|------------------------|------------------------|---------|
|  | 10/1/07 4:29 PM EDT (3) | Cindy Walsh | Electric Power Utility | site visit rescheduled | Hide |
|  | 9/29/07 2:58 PM EDT | Peter Holm | Elsbeth International | engineer by specialist | Hide |
|  | 9/29/07 2:52 PM EDT (3) | Cindy Walsh | Elect | | |

Create Message

To: ☒ All Bid Teams ☐ Bidding/Invited Bid Team(s)
☐ Selected Bid Team(s) ☐ Buyer Team

From: Cindy Walsh; Electric Power Utility



Date: 10/1/07 4:28 PM EDT

Subject: site visit rescheduled

Message:
The site visit at Substation #3 has been rescheduled for Wednesday at 3pm.



Note: Maximum message length is 3000 characters.

Attachments: Add Attachment

| Description | Type | Date | RFx | View | Remove |
|-----------------|-----------------------|---------|-----|--|--|
| Sub#3 site prep | Technical Information | 10/3/07 | |  |  |

Send Save Draft Close

To view a message:

- Click the message subject or status icon ( / )

View Message

Subject: site prep

- 10/3/07 9:44 AM EDT; Michael Williams; Electric Power Utility to All Bid Teams
- 10/3/07 9:45 AM EDT; Lori Evans; Portico Steel to Buyer Team
- 10/3/07 9:46 AM EDT; Elsbeth Piernot; Elsbeth International to Buyer Team

From: Elsbeth Piernot; Elsbeth International

To: Electric Power Utility Buyer Team

Cc: Elsbeth International Bid Team


Date: 10/3/07 9:46 AM EDT

Subject: site visit rescheduled

Message:
Cindy;
Attaching our list for the site prep
-- E.

--- Original Message Sent 10/3/07 9:44 AM EDT ---
Are there any questions we need to address at the site visit? -- Cindy

Attachments:

| Description | Type | Submittals | View |
|---------------------|--------------------|------------|---|
| site prep questions | Message Attachment | |  |

Reply Close

Tips

- PA Messaging supports event-specific communication between buyer and supplier teams. Messages and file attachments are embedded within an event, and cannot be viewed outside of that event.
- Messages are sent to entire teams; one-to-one messaging is not allowed.
- You can receive [external] email notifications of new event-related messages.

Can I continue working with suppliers after an event has closed?

The screenshot shows the 'Post Bid' setup interface. At the top, there are tabs for Setup, Status, RFx, Submittals, Commercial, Technical, Pricing, Post Bid, Evaluate, and Award. Below these are sub-tabs: Details, Items, Schedule, Buyers, Commercial, Technical, Pricing, Suppliers, Post Bid, Evaluate, and a Supplier Preview icon.

1. On the Setup > Post Bid tab, select Enable Post Bid Collaboration. (Red line points to the 'Enable Post-Bid Collaboration' radio button in the Activity Type section.)

2. Set a time for the Post Bid period to close Automatically, or opt to close it Manually when it is complete. (Red line points to the 'Close Post Bid' section.)

3. Select a Short List of suppliers that may participate in post-bid activity. (Red line points to the 'Short List' table.)

4. Click Save. (Red line points to the 'Save' button.)

Activity Type

☒ **Enable Post-Bid Collaboration** (Allows exchange of documents after bid closes)

☐ **Enable Multi-Round Bidding** (Create new event to enable next round of bidding)

☐ **No Post-Bid Activity**

Post Bid

Please select a date and time for the Post-Bid activity to close or choose "Manually" to close at an undefined later time.

Close Post Bid: ☐ Automatically ☒ Manually

Date: [Date Picker] **Time:** [4] [00] PM (EDT)

Short List

| Include | Bid Team | Lead Company | Bid Intention | Approval State |
|--------------------------|-----------------------|-----------------------|---------------|----------------|
| <input type="checkbox"/> | Aeron Engineering | Aeron Engineering | Bidding | Approved |
| <input type="checkbox"/> | Elsbeth International | Elsbeth International | Bidding | Approved |
| <input type="checkbox"/> | Portico Steel | Portico Steel | Bidding | Approved |

Save

Once saved, a **Post Bid** tab appears on the top row.

5. Go to the main **Post Bid > Buyer Docs** tab and upload any additional documents you need to work with in the Post Bid period.

Tips

- You can post documents to be viewed by all bid teams, or a specific bid team only.
- Post Bid documents that suppliers upload appear on your **Post Bid > Submittals** tab.

How do I turn an RFI event into an RFP event?

1. Create an RFx event and manage it as usual.
2. Once the event closes, go to the **Setup > Post Bid** tab.
3. Select **Enable Multi-Round Bidding**.

4. Name the new event and enter **Link Names** for both events to distinguish them and for navigating between them (RFI & RFP, Round 1 & Round 2, etc.).

5. Select a Short List of suppliers that may participate in the next round.

6. Click **Enable Multi-Round**.

Activity Type

☐ Enable Post-Bid Collaboration (Allows exchange of documents after bid closes)

☒ **Enable Multi-Round Bidding** (Create new event to enable next round of bidding)

☐ No Post-Bid Activity

Multi-Round Bid

Multi-Round Bidding is enabled by making a copy of an event and linking it to the original event.

Current Event: Widgets and Gizmos

New Event: Widgets and Gizmos

Link Name: RFI

Link Name: RFP

Note: Not An Event Type

Short List

| Include | Bid Team | Lead Company | Bid Intention | Approval State |
|--------------------------|-----------------------|-----------------------|---------------|----------------|
| <input type="checkbox"/> | Aeron Engineering | Aeron Engineering | Bidding | Approved |
| <input type="checkbox"/> | Elsbeth International | Elsbeth International | Bidding | Approved |
| <input type="checkbox"/> | Portico Steel | Portico Steel | Bidding | Approved |

Enable Multi-Round

Event Setup: Multi-Round Bidding

Select, deselect, or change the information below and click **Copy to New Round** to enable multi-round bidding for **Widgets and Gizmos**.

Collapse All Select All Deselect All

Details

Items

Schedule

Datasheets

You may add additional datasheets to the bid through *Bid Setup* after the event is copied.

| Datasheet Type | Datasheet Title | Preview | Copy? | Copy Supplier Data? | Copy Baseline Data? |
|----------------|------------------|-------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Commercial | Std. Terms | preview | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Technical | Tolerances | preview | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Pricing | Standard Pricing | preview | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Supplier Submittals

Bid teams were selected on the Setup > Post-Bid Screen of the previous event. Those supplier bid teams cannot be modified at this point, but suppliers can be added or removed once the next round event is enabled.

Copy Supplier Submittals? ☒ Yes ☐ No

RFx Documents

It is critical that you verify the applicability, correctness, and consistency of the documents prior to opening the bid. Click on the document description below to preview the document.

| Document Description | File Name | Rev # | Ref # | Date | Size | Copy? |
|----------------------|----------------|-------|-------|------------|--------|--------------------------|
| Widgets & Gizmos RFP | widgiz_rfp.pdf | A | 42-01 | 01/30/2006 | 994 kb | <input type="checkbox"/> |

Auction Lots Copy All Auction Lots? ☒

Back **Copy to New Round** Cancel

* Required Field

7. Configure the event – you can copy documents, datasheets, supplier teams, etc. into the next round.

8. Click **Copy to New Round**.

9. Review your event settings on the Validate Event Details page and then click **Copy to New Round**.

Tips

- Enabling Multi-Round bidding makes a full event copy, with submitted data.
- The new event can be modified to include or request additional information.

How do I access supplier submittals?

The **Submittals** tab displays suppliers' responses to your bid packages.

The document summary page (the default view) displays the documents that each supplier team has submitted, categorized by Commercial, Technical, or Pricing.

Submittals

Pre-Bid

Bid

Supplier Preview

Select All

Download Selected Files

Clear All

| Bid Team | Commercial and Administrative | Technical Information | Pricing |
|---|---|-----------------------|---|
| Aeron Engineering View Document Details | <input type="checkbox"/> Addendum 1.doc (06/03/10 8:40 PM, 99 kb) | (None) | <input type="checkbox"/> prc.xls (05/31/10 3:00 AM, 7 kb) |
| Elsbeth International View Document Details | (None) | (None) | (None) |
| LoTech Specialties View Document Details | <input type="checkbox"/> p23abp.pdf (06/01/10 12:43 PM, 420 kb) | (None) | (None) |

Submittals

Pre-Bid

Bid

Supplier Preview

Document Summary Page

Documents Submitted by LoTech Specialties

Select All

Download Selected Files

Clear All

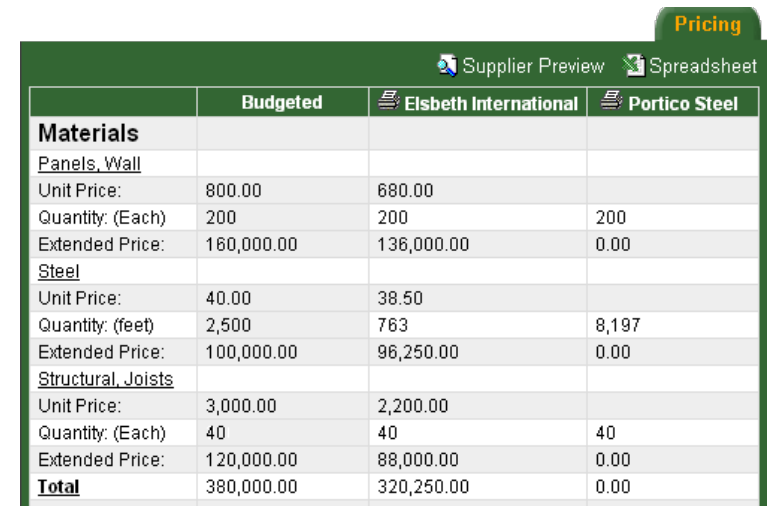
Commercial

| Document Description | Issue Date | Ref ID | Rev # | File Name | File Size | Upload Date | Download | Actions |
|-----------------------|------------|--------|-------|------------|-----------|-------------|----------|---------|
| Pier 23 Architectural | 6/01/10 | 133-22 | A | p23abp.pdf | 420 KB | 6/01/10 | | |

Click **View Document Details** above a team's name to view a description and version details for each document submitted; click **Document Summary Page** to toggle back to the other view

The main **Commercial**, **Technical**, and **Pricing** datasheet tabs display suppliers' answers to the questions you configured on the corresponding **Setup > [Datasheet]** tabs.

The tabular format is intended to facilitate comparison across suppliers; click **Spreadsheet** to save all data in a Microsoft Excel spreadsheet for offline analysis.



| Pricing | | | |
|------------------------------|------------|-----------------------|---------------|
| Supplier Preview Spreadsheet | | | |
| | Budgeted | Elsbeth International | Portico Steel |
| Materials | | | |
| <u>Panels, Wall</u> | | | |
| Unit Price: | 800.00 | 680.00 | |
| Quantity: (Each) | 200 | 200 | 200 |
| Extended Price: | 160,000.00 | 136,000.00 | 0.00 |
| <u>Steel</u> | | | |
| Unit Price: | 40.00 | 38.50 | |
| Quantity: (feet) | 2,500 | 763 | 8,197 |
| Extended Price: | 100,000.00 | 96,250.00 | 0.00 |
| <u>Structural Joists</u> | | | |
| Unit Price: | 3,000.00 | 2,200.00 | |
| Quantity: (Each) | 40 | 40 | 40 |
| Extended Price: | 120,000.00 | 88,000.00 | 0.00 |
| Total | 380,000.00 | 320,250.00 | 0.00 |

Is there a way to leave event feedback or rate suppliers?

There are two types of evaluations, both of which are optional:

Event Performance:

The **Evaluate** tab appears automatically after an event closes; it is a standard form to collect comments and general information.

Evaluate | Supplier Preview

| Delete | Name | Score | Comments | Performance Data |
|-------------------------------------|-----------------------|--------------------------|----------|--|
| <input checked="" type="checkbox"/> | Aeron Engineering | 0.0 (5=Best, 1=Worst) | | <input type="checkbox"/> Update Made bid? <input type="text" value="N"/> Price rating (>=1): <input type="text" value="0.00"/> Completion ratio (0-1): <input type="text" value="0.00"/> Lead time (wks): <input type="text" value="0.0"/> |
| <input checked="" type="checkbox"/> | Elsbeth International | 0.0 (5=Best, 1=Worst) | | <input type="checkbox"/> Update Made bid? <input type="text" value="N"/> Price rating (>=1): <input type="text" value="0.00"/> Completion ratio (0-1): <input type="text" value="0.00"/> Lead time (wks): <input type="text" value="0.0"/> |

Scorecards:

You create custom scorecards on the **Setup > Evaluate** tab with your own questions/criteria, and specify how the results are weighted.

Edit Scorecard Criteria

Scorecard Name: Ordering and Fulfillment

| Criteria | Weight (%) | Order | Delete |
|--------------------------------------|------------|-------|-------------------------------------|
| Ordering/ Customer Service | | | |
| Customer Service staff were helpful | 15 | | <input checked="" type="checkbox"/> |
| All of my questions were addressed | | | <input checked="" type="checkbox"/> |
| I would work with them again | | | |
| Shipping | | | |
| Order arrived in a timely fashion | | | |
| Components arrived in good condition | | | |
| The correct items were received | | | |

Ordering and Fulfillment

Instructions: Please complete the scorecard and submit your evaluation. Use Maximum as the best score, and

| Criteria | Weight | Raw Score(1-5) | Weighted Score | Raw Score(1-5) |
|--------------------------------------|--------|----------------|----------------|----------------|
| Ordering/ Customer Service | | | | |
| Customer Service staff were helpful | ##% | 4.30 | ## | 5.00 |
| All of my questions were addressed | ##% | 4.00 | ## | 5.00 |
| I would work with them again | ##% | 4.80 | ## | 5.00 |
| Shipping | | | | |
| Order arrived in a timely fashion | ##% | 5.00 | ## | 4.50 |
| Components arrived in good condition | ##% | 4.90 | ## | 4.50 |
| The correct items were received | ##% | 5.00 | ## | 4.80 |
| Total Weighted Score | | | 4.70 | 4.74 |

Comments:
Staff at Elsbeth were outstanding!

Scorecard Results

| Scorecards | Aeron Engineering | Elsbeth International | Portico Steel |
|--------------------------|-------------------|-----------------------|-----------------|
| Ordering and Fulfillment | ## | ## | (Not Evaluated) |
| Cindy Walsh | ## | ## | (Not Evaluated) |
| Ed Fisk | 4.70 | 4.74 | (Not Evaluated) |
| Mary Tate | ## | ## | (Not Evaluated) |
| Catalog | ## | ## | ## |
| Total Score | ## | ## | ## |

Buyer team members complete the form you create.

Results are tabulated on the **Evaluate > Scorecard** tab.

How do I award a bid to a supplier?

1. From the **Award** tab (which appears after the bid closes), click **Award Items**.
2. Select the **Supplier Site** and **Billing/Shipping Addresses**, and enter an award **Description**.
3. Check off the Items that you want to award and enter the **Quantity** and **Total Cost**.
4. Click **Save**; if you have additional items to award, click **Another Award**.
5. When awards are complete, click **Award Items**.
6. Click **Submit Award**.
7. Notify suppliers of their award status; there is no automatic notification.

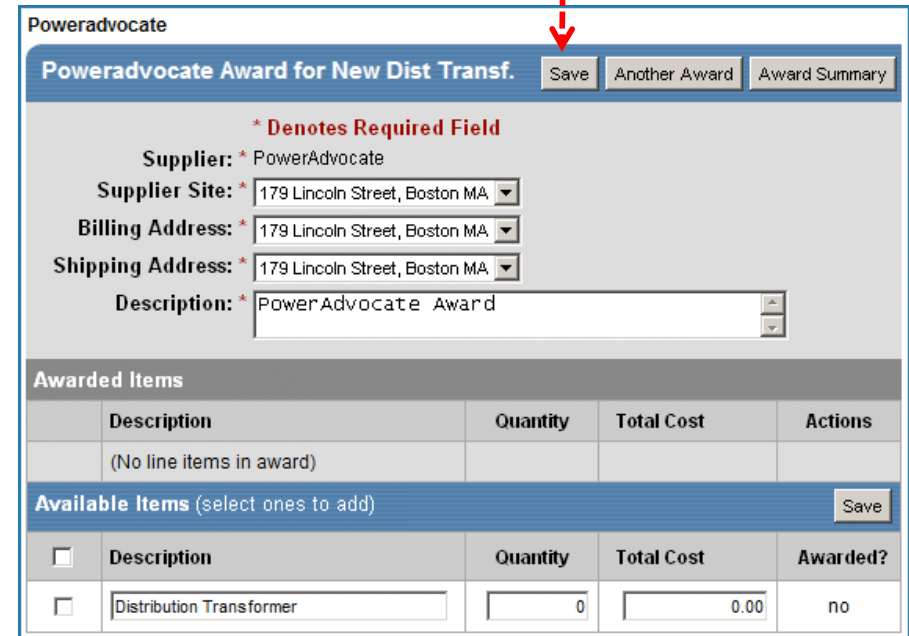


Setup Status RFx Submittals Commercial Technical Pricing Evaluate **Award**

Supplier Preview

Award Summary **Award Items** Submit No Award

| Supplier | Reason |
|------------|--------|
| (No Award) | |



Poweradvocate

Poweradvocate Award for New Dist Transf. Save Another Award Award Summary

* Denotes Required Field

Supplier: * PowerAdvocate

Supplier Site: * 179 Lincoln Street, Boston MA

Billing Address: * 179 Lincoln Street, Boston MA

Shipping Address: * 179 Lincoln Street, Boston MA

Description: * PowerAdvocate Award

Awarded Items

| Description | Quantity | Total Cost | Actions |
|--------------------------|----------|------------|---------|
| (No line items in award) | | | |

Available Items (select ones to add) Save

| <input type="checkbox"/> | Description | Quantity | Total Cost | Awarded? |
|--------------------------|--------------------------|----------|------------|----------|
| <input type="checkbox"/> | Distribution Transformer | 0 | 0.00 | no |

Tip

- Once an event is Closed, you cannot configure post-bid activity or multi-round bidding, though you can copy it to use as a template in a new event.

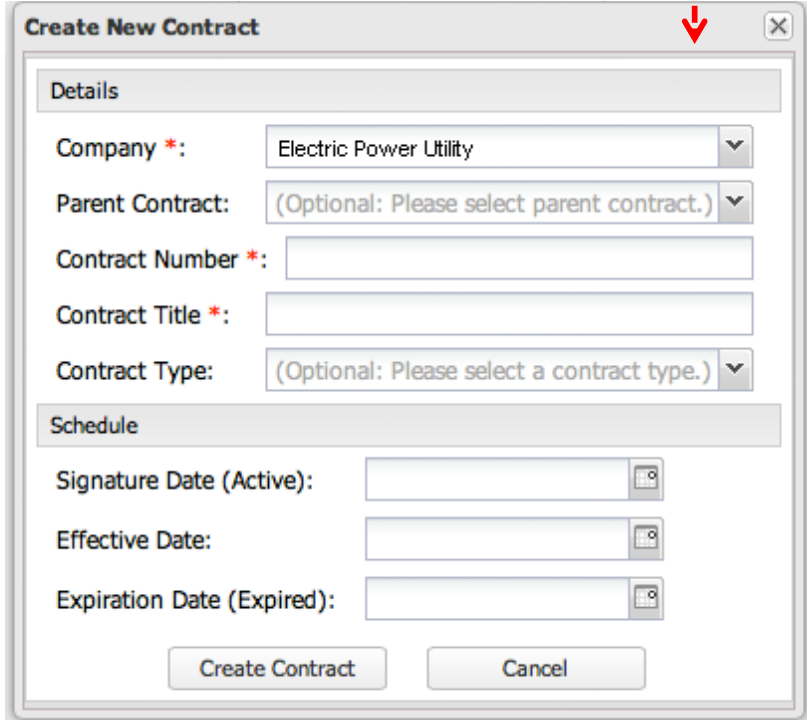
How do I create a Contract?

If you subscribe to Contract Intelligence, you can access the **Contracts** tab and create contracts from within Bid Event. This tab displays both contracts that were created from within an event, and Contract Intelligence contracts that were associated with the event from the contract's **Setup > Details** tab. Click a **Contract Title** to view the contract in Contract Intelligence.

1. After items are awarded and submitted, click the event's **Contracts** tab.
2. Click **Create New Contract**.
3. Fill in the contract **Details**:
 - Select a **Company** if possible (in most cases you will only have one choice, your own company).
 - If this contract has a **Parent Contract**, select it from the list.
 - Provide a **Contract Number** and **Contract Title**.
 - Select a **Contract Type** as appropriate.
4. Optionally, provide one or more Schedule dates.
 - **Signature Date**: The date on which the contract is signed and becomes active; prior to this date it is considered a draft.
 - **Effective Date**: The date on which the contract takes effect.
 - **Expiration Date**: The date on which the contract expires.
5. Click **Create Contract**.



| Contracts | | | |
|-------------------------------|------------------|---------------------|---------|
| | | | |
| Contract Title | Contract Owner | Contract Type | Actions |
| Fuel Depot | Haase, Camden | Indefinite Delivery | |
| Service | Deen, Kelley | | |
| Site Planning | Deen, Kelley | | |
| Logistics | Haase, Catherine | | |



Create New Contract

Details

Company *: Electric Power Utility

Parent Contract: (Optional: Please select parent contract.)

Contract Number *:

Contract Title *:

Contract Type: (Optional: Please select a contract type.)

Schedule

Signature Date (Active):

Effective Date:

Expiration Date (Expired):

Create Contract Cancel