

# PowerAdvocate Sourcing Intelligence®

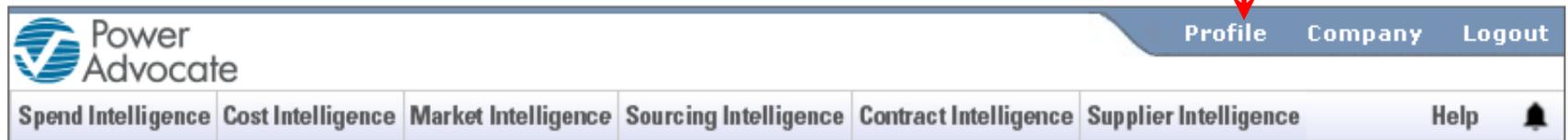
*Buyers' Frequently Asked Questions*

August 2019



# How do I log in to Sourcing Intelligence?

1. Launch a web browser and go to [www.poweradvocate.com](http://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**.



Your “Home” product’s Dashboard appears.

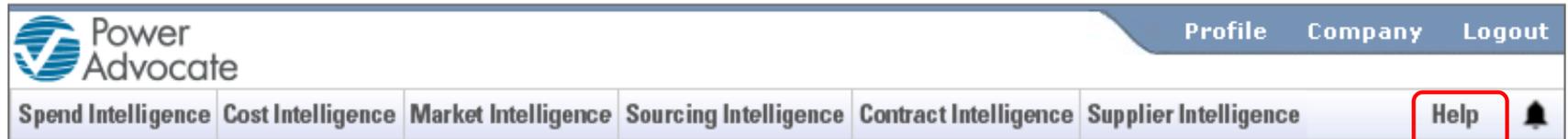
If Sourcing Intelligence is not your Home product, click **Sourcing Intelligence** on the navigation bar to display its Dashboard.

## 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.

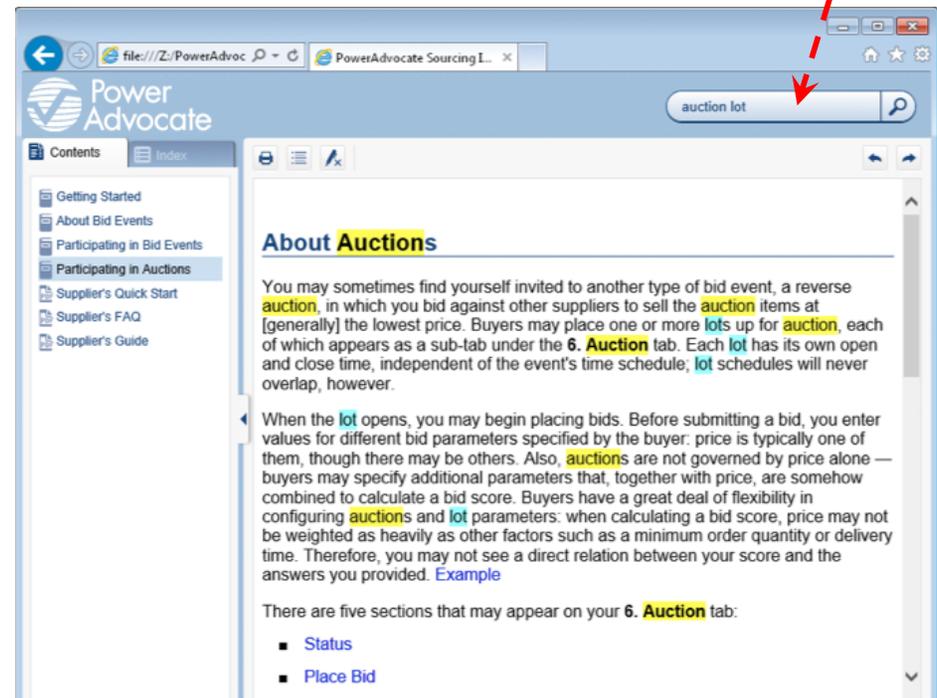
# How do I get more information if I need it?

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

### My Favorite Bid Events

Actions	Event #	Event Title	Status	Event Coordi...	Company	Close Time	Open Time	Event Ty
	<a href="#">72229</a>	<a href="#">Quick Bid - TXUE</a>	Open	<a href="#">Haase, Cath...</a>	Power Utility	07/27/2018 7:...	07/27/2017 1...	RFX
	<a href="#">75174</a>	<a href="#">CC proj. EPC RFQ</a>	Open	<a href="#">Haase, Cam...</a>	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
	<a href="#">40083</a>	<a href="#">Switch Land...</a>	<a href="#">Deen, Kelley</a>	Power Utility	11/29/2020 4:...	01/01/2018 8:...		
	<a href="#">72229</a>	<a href="#">Quick Bid - ...</a>	<a href="#">Haase, Cathe...</a>	Power Utility	07/27/2018 7:...	07/27/2017 1...		
	<a href="#">35512</a>	<a href="#">Substation D...</a>	<a href="#">Haase, Cathe...</a>	Power Utility	07/13/2018 7:...	07/13/2017 1...		
	<a href="#">75174</a>	<a href="#">CC proj...</a>	<a href="#">Haase, Camd...</a>	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
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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: \*     (EDT)  
 Event Close Date & Time: \*     (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**

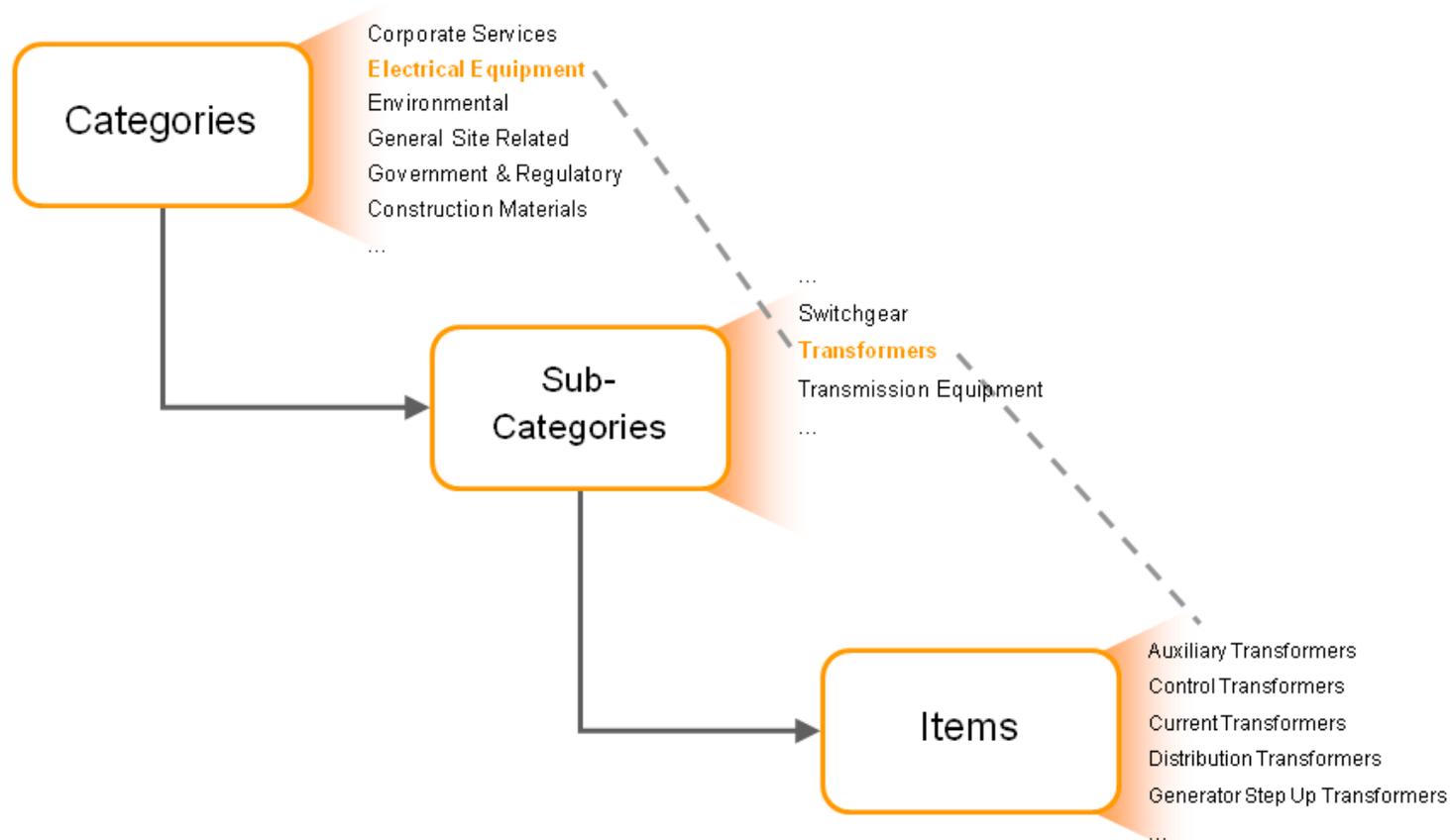
- Setup is similar to RFx.
- The buyer team cannot review suppliers' submittals until after the event closes.
- Because you cannot monitor suppliers' documents as they are submitted, Sealed Bid events generally require more clarification cycles after the event closes (vs. RFx events).

## **[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.

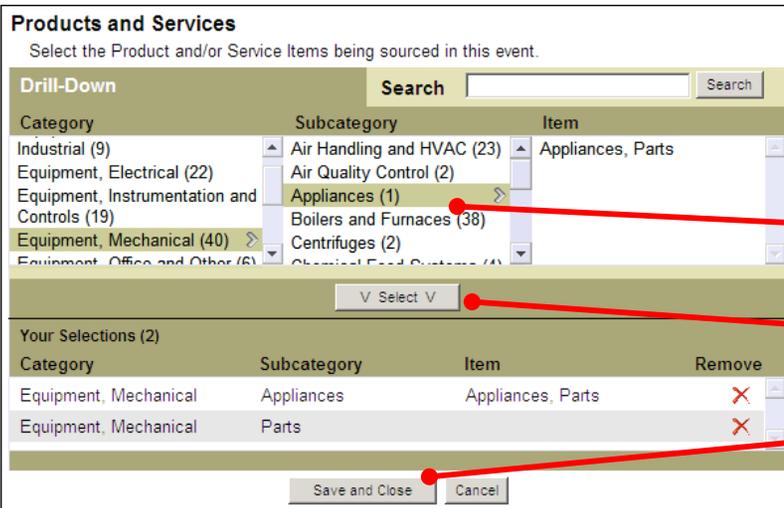
# What is the PowerAdvocate item directory?

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:

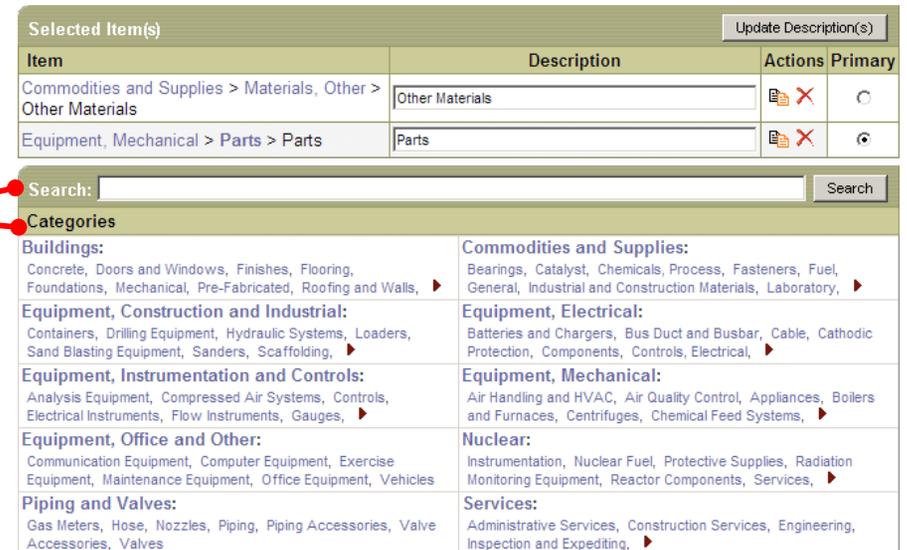


When creating an event, you must add at least one item:

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**.



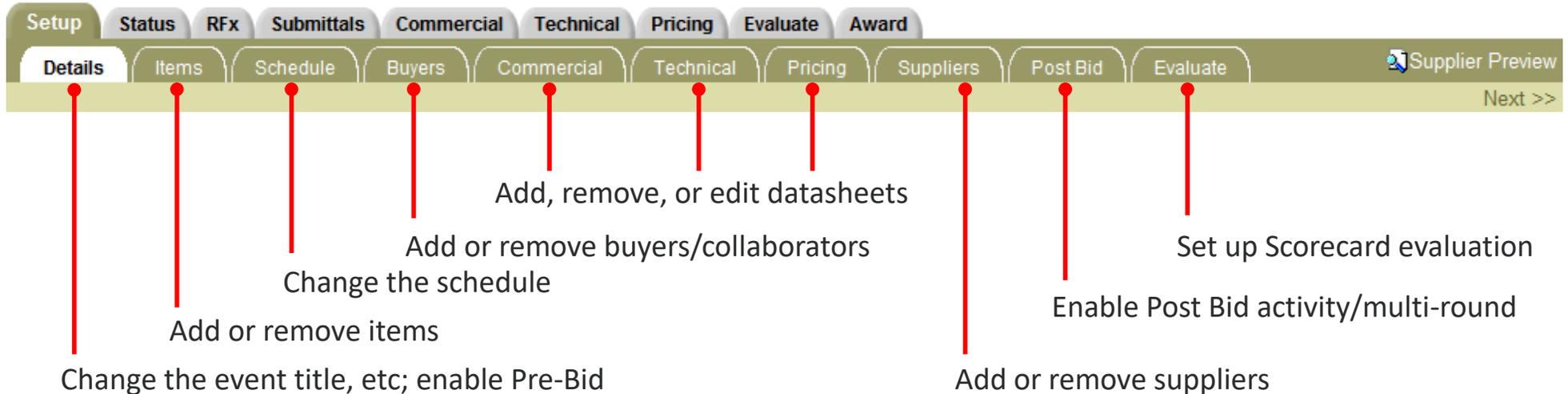
# What else is involved in event setup?

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

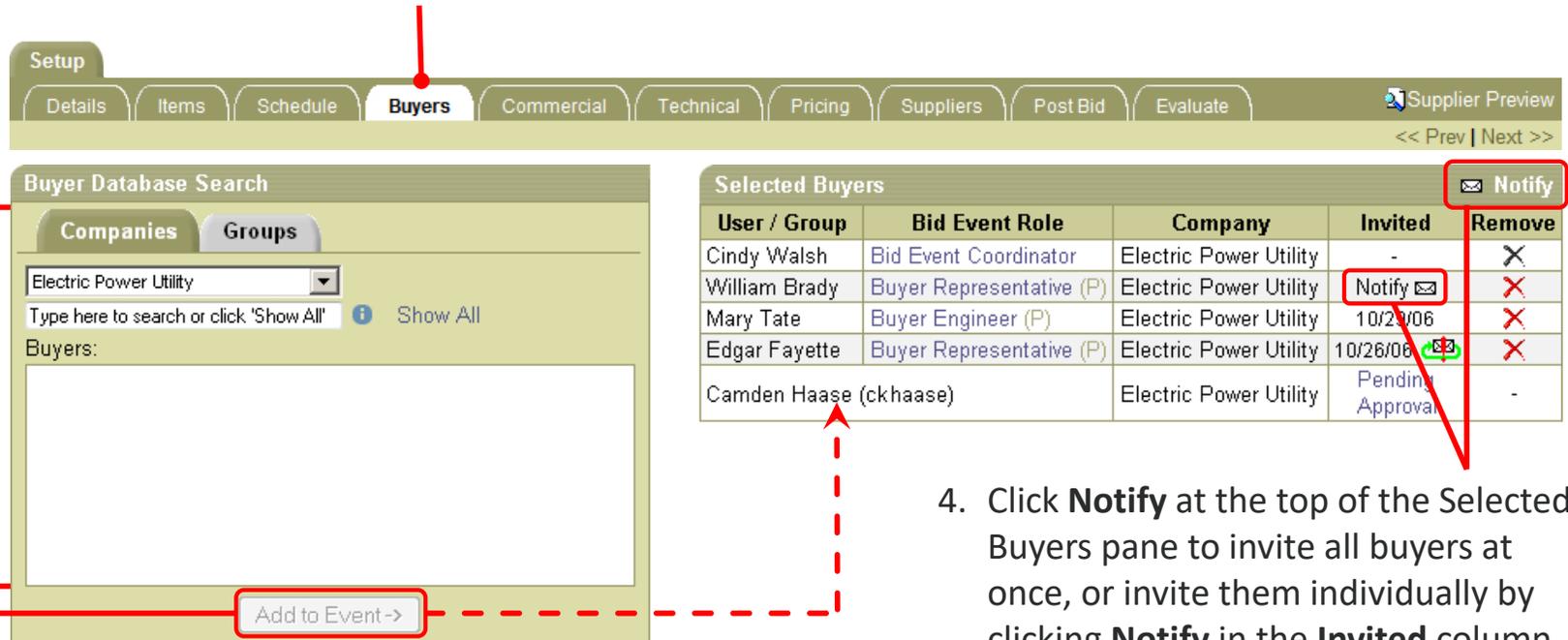


### Tips

- 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	-	X
William Brady	Buyer Representative (P)	Electric Power Utility	Notify	X
Mary Tate	Buyer Engineer (P)	Electric Power Utility	10/29/06	X
Edgar Fayette	Buyer Representative (P)	Electric Power Utility	10/26/06	X
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 **X** 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	-	X
William Brady	Buyer Representative (P)	Electric Power Utility	Notify	X
Mary Tate	Buyer Engineer (P)	Electric Power Utility	10/29/06	X

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:**

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

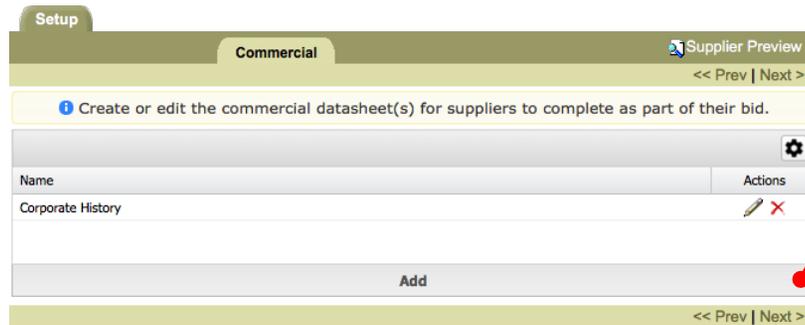
**Back** **Submit** **Cancel**

## Tips

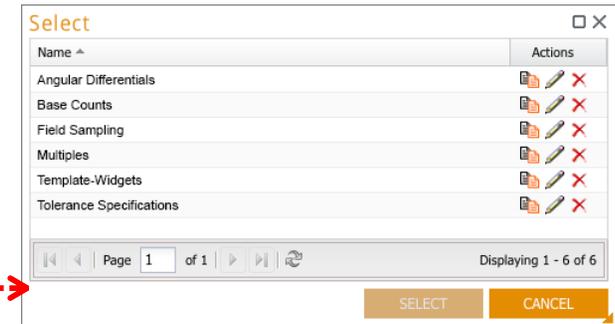
- Confirmation screens allow you to send notification emails to you and the new BEC.
- Roles can be changed back, or further modified at any time, by the new BEC.

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

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



2. Click **Add**.



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

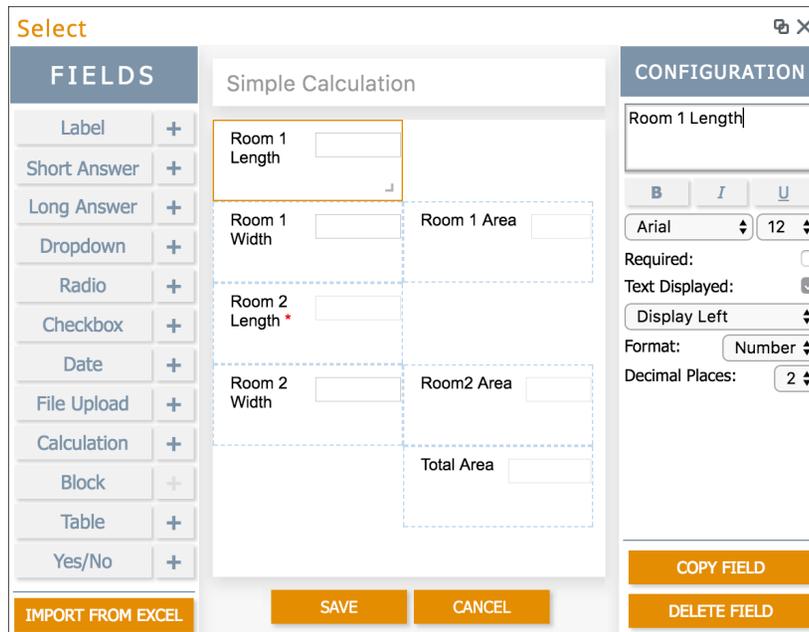
- Datasheets are forms for collecting information; an event may have many datasheets, one, or none at all.
- You can display suppliers' submittals side-by-side or export the data to an Excel spreadsheet for further manipulation.
- An alternative to datasheets is posting documents on the event's **RFx**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

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

## Datasheet Builder:

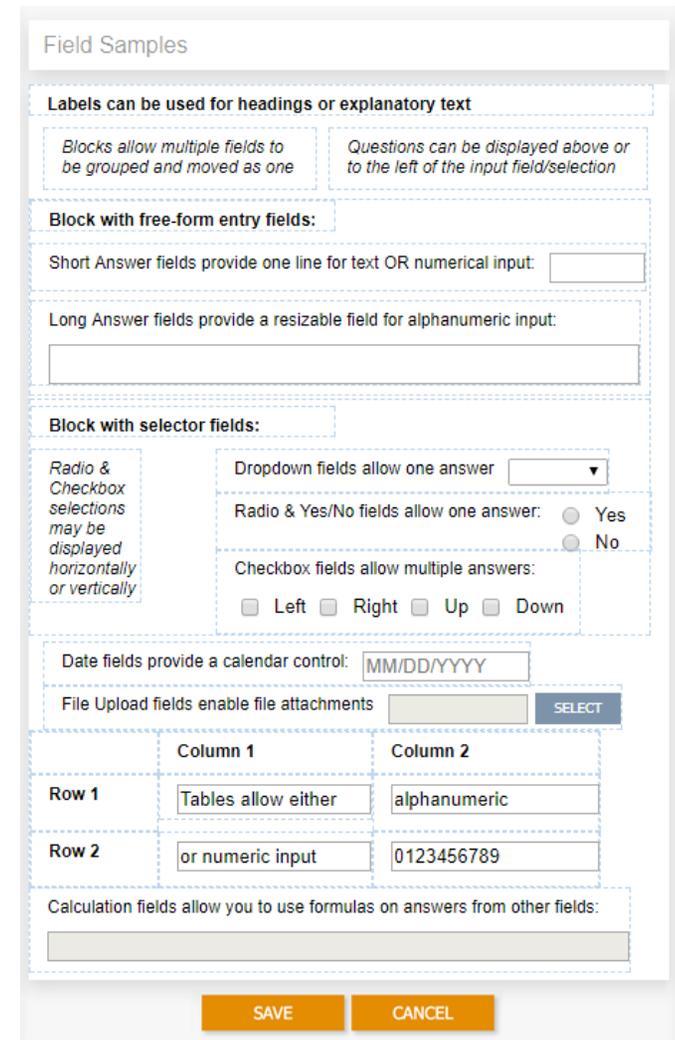
The Datasheet builder has three main components:

- 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.



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?

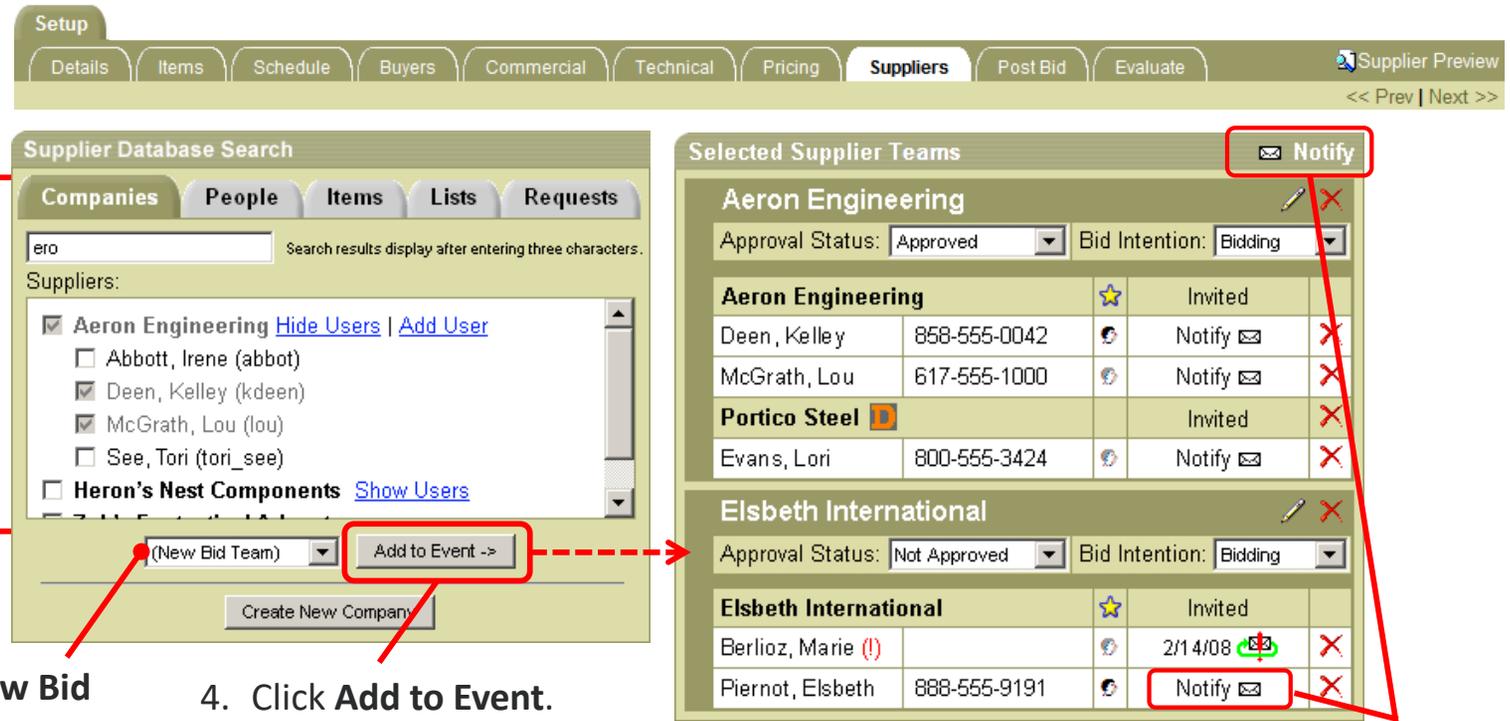
1. Click the **Setup > Suppliers** tab.

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.



## 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 **X**) 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		☆	Inited	
Deen, Kelley	858-555-0042		Notify	
McGrath, Lou	617-555-1000		Notify	

**Portico Steel** D ☆ Inited ✕

Evans, Lori	800-555-3424		Notify	
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**Elsbeth International** ✎ ✕

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

Elsbeth International		☆	Inited	
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	
<b>Description:</b> 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

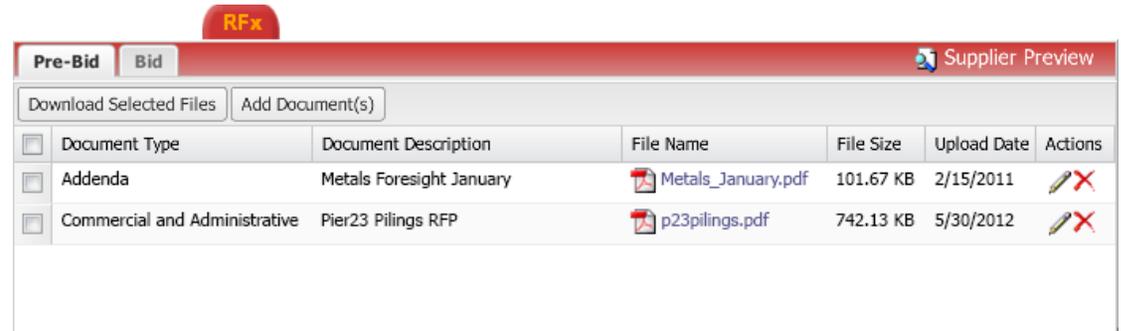
Description (as displayed on the Opportunities dashboard):

# 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.

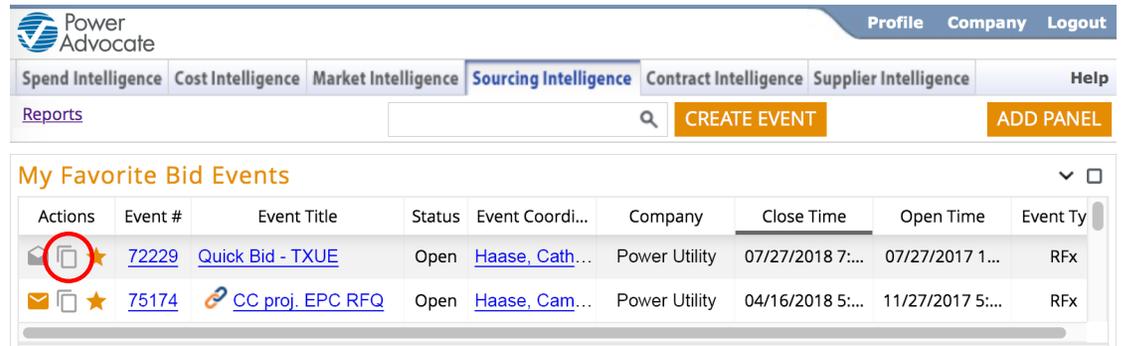
## Method 1

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.



## Method 2

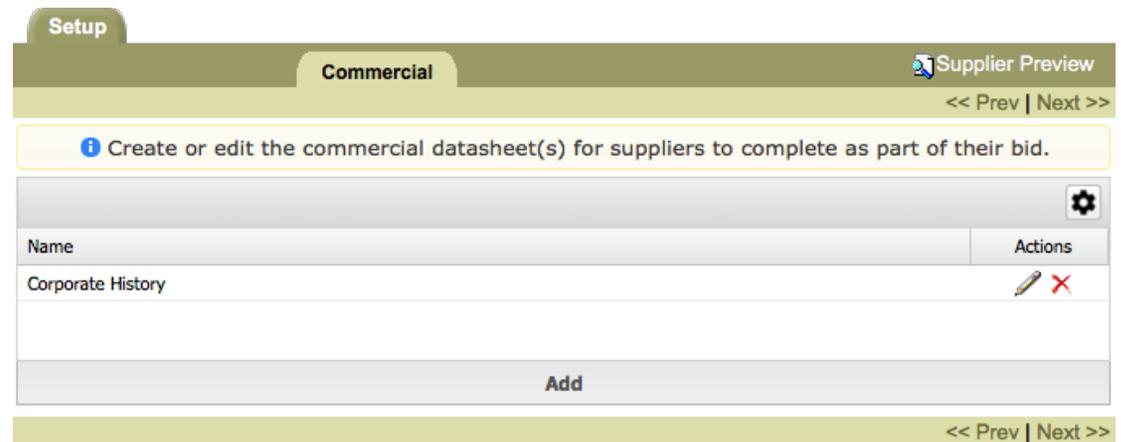
Create a **Base Event** to use as a template (with your standard documents, datasheets, etc.), and create new events by copying that base event – this is more efficient method than #1, especially with multiple documents.



## 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.

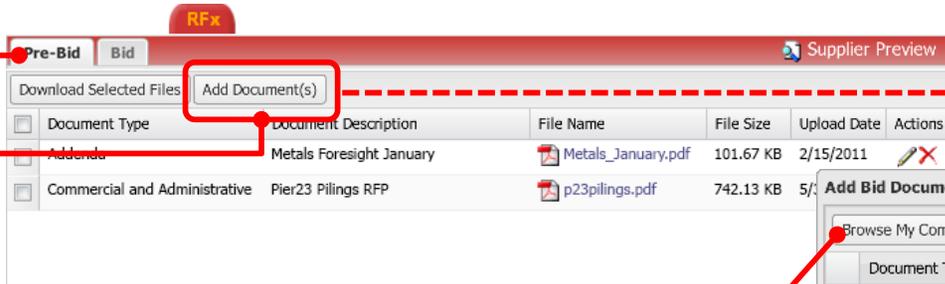
Also useful when you have multiple short-answer or multiple choice questions, as you can compare all suppliers' answers side-by-side.



# How do I attach bid documents to an event?

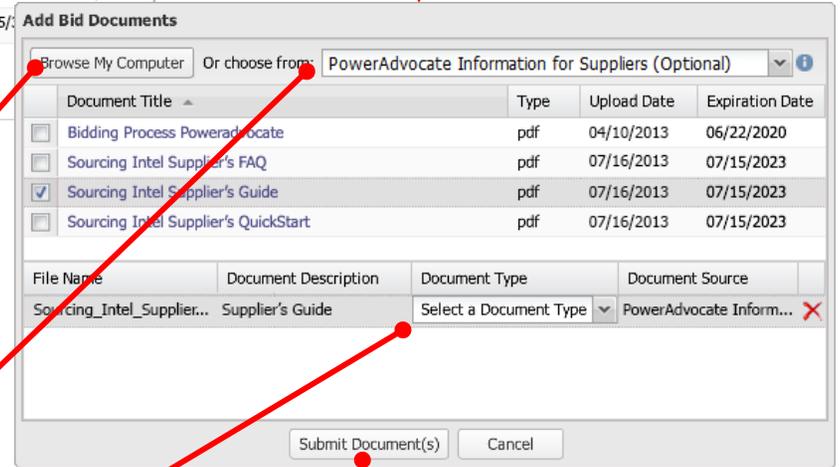
1. Click the event's **RFx** tab and select a sub-tab as appropriate.

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(s) 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)
- Zebur 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 - Warehouse 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 icon on the **Status** tab, or / 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

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?



1. On the **Setup > Post Bid** tab, select **Enable Post Bid Collaboration**.

**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**

2. Set a time for the Post Bid period to close **Automatically**, or opt to close it **Manually** when it is complete.

**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:** [Calendar icon] **Time:** [4] [00] [PM] (EDT)

3. Select a Short List of suppliers that may participate in post-bid activity.

**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

4. Click **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**.

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		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Technical	Tolerances		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pricing	Standard Pricing		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

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"/>

Copy All Auction Lots?

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.

Bid Team	Commercial and Administrative	Technical Information	Pricing
<b>Aeron Engineering</b> <a href="#">View Document Details</a>	<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)
<b>Elsbeth International</b> <a href="#">View Document Details</a>	(None)	(None)	(None)
<b>LoTech Specialties</b> <a href="#">View Document Details</a>	<input type="checkbox"/> p23abp.pdf (06/01/10 12:43 PM, 420 kb)	(None)	(None)

**Documents Submitted by LoTech Specialties** Document Summary Page

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	<input type="checkbox"/>	

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.

	Budgeted	Elsbeth International	Portico Steel
<b>Materials</b>			
<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
<b>Total</b>	<b>380,000.00</b>	<b>320,250.00</b>	<b>0.00</b>

# 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.

## Scorecards:

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

Criteria	Weight	Raw Score(1-5)	Weighted Score	Raw Score(1-5)
<b>Ordering/ Customer Service</b>				
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
<b>Shipping</b>				
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	##	4.60
<b>Total Weighted Score</b>			<b>4.70</b>	<b>4.74</b>

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	##	##	##
<b>Total Score</b>	<b>##</b>	<b>##</b>	<b>##</b>

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.

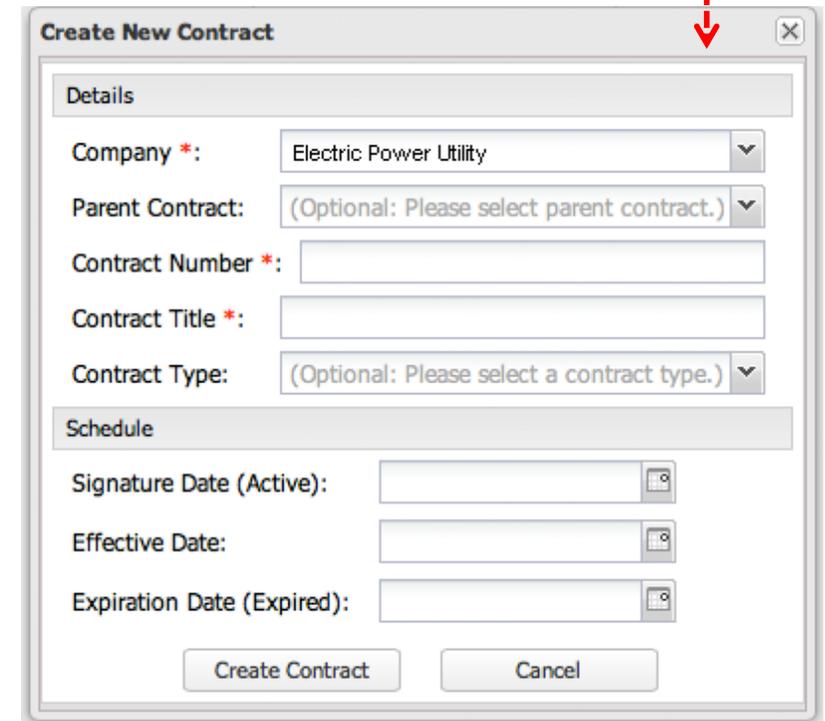
# How do I create a Contract?

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**.



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