

QUICK REFERENCE GUIDE

Adjusting Preferences to Amounts on an Event

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Basics

Periodically the agency event buyer may need to do preference adjustments to the prices on vendor responses to an event. The tabulation for this is completed off line using the state's current Authority for Local Purchase manual and policies on preferences. Once the tabulation has been completed the Event buyer can place these adjusted amounts into the event using the T Adjustments feature found on the Analyze Total page.

Requirements

1. Event Posted and end date reached.
2. Vendors have or buyers have responded on behalf of vendors to an Event.
3. The event has been analyzed by the buyer and responses are found to be valid.

Analyze the Event for Responsiveness

Navigation: Sourcing, Maintain Events, Event Workbench

1. Enter the Event ID you wish to analyze.
2. Click search button.
3. Click the analyze bids icon.
4. Review vendors for responsiveness (all bid factors have been answered correctly).
5. Click Analyze line link.
6. Click Analyze link.
7. Review line for responsiveness (any and all bid factors have been answered correctly).
8. Bid tabulation results that have been completed off line should be attached to the external bid tab attachment icon bubble.

Add Preference Adjusted Amounts to the Event

1. Expand the "Adjustments" section on the event analyze total or line page.
2. Click the "T Adjustments" link.
3. Enter Vendor/Customer name from the prompt, Bid ID number, Bid Location, Type of T1 and the preference adjusted amount in the appropriate fields.
4. Repeat this process for all responsive vendor responses for the event.
5. Click OK button.
6. Click Save button.
7. Complete analyze process.
8. Proceed to award the event.