Event Setup

You define the basics of the event such as Event Title, Event Number, Commodity Codes, Payment Terms, Dates, and more on the Event Setup page. Configure the Event Setup when you Create an Event, or you may edit the Event Setup page while the Event is in Draft status. Events will remain in draft status until they are issued to suppliers.

Some fields are required, such as **Open Date** and **Close Date**. These fields are indicated with an asterisk (*).

Event information: You may edit the Event title at any time. The event type and work group cannot be changed once the event is created and are shown as read-only.

Custom Data: Additional fields may appear below the event information section on the **Setup** page. Or, they may appear in a list as separate pages under the **Setup** page. This depends on the custom field configuration for the event. Complete these fields as needed.

Payment information: US Dollars will show as the currency for all items. You can include an estimated value for the event and select from your organization's sourcing payment terms. Both fields are optional. The fields may be hidden for all events via field management if you do not utilize **Estimated Value** or **Payment Terms**.

Bid and Evaluation settings: You may see some configuration options as read-only, depending on your organization and work group settings. You may select whether to allow the below options for your event:

- **Work Groups:** A work group is like a TUB to which a sourcing event or contract can be added. It's primarily used for reporting purposes.

- **Sealed Bid:** Hides the bid and answers to questions until the event close date, Indicate if the event will use sealed bids.

- **Respond by Proxy:** Allows sourcing owner to bid on behalf of the supplier. Indicate if proxy bids will be allowed for the event.

- **Use Panel Questionnaire:** Indicate if a panel questionnaire should be con-figured for the event as a tool for evaluating supplier responses. A **Panel Questionnaire** section will show in the event navigation, if enabled.

- **Auto Score:** Indicate if auto scoring should be used for the event or event line items, as a tool for evaluating supplier responses. If enabled, an Auto Score sub-section will show under the Evaluations section of the event navigation. You will also have the option to Default all questions to use Auto Score (applies to event questions) and Apply Auto Score at the individual line level (applies to event line items). The Apply Auto Score at the individual line level option allows organizations to request information about individual products and services being bid on by suppliers responding to the event. If enabled, auto score values need to be configured on Additional Item Fields.

- **Alternate Items:** Allows for items to be provided with different SKUs or part numbers than what was originally requested for the bid. Indicate if alternate items will be allowed. Additional configuration is available upon adding items, if yes is selected..

- **Allow Split Item Quantity in Evaluations:** Select if you would like the option to split the item quantity awarded among different suppliers on the event.

- **Enforce Minimum Price:** Indicates if minimum prices will be set for items on the event. A Minimum Price field will appear on the Add Item pop-up to set the minimum price for the item, if enabled.

- **Enforce Maximum Price:** Indicates if maximum prices will be set for items on the event. A Maximum Price field will appear on the Add Item pop-up to set the maximum price for the item, If enabled.

- **Confidential Pricing:** This hides supplier pricing until the close date. This setting displays on the **Setup** page of an event when **Confidential Pricing** is enabled on the **General Sourcing Settings** page. This option adds a new access group – **Event Price Viewers** – to the **Users** section of the event.

- **Display and Communication Settings:** Selecting **Yes**, shows the event on the B2P public site where any vendor may view it. The Public Event Short Description appears, where you can enter up to 200 characters describing the event.

- **Dates:** Select from the available time zones for your organization, then select the dates and times for the event.

- **Time Zone:** Select the appropriate time zone for the event.

- **Release Date:** The date to release the event to suppliers. It can be released before the open date. Bids can only be entered **after** the open date. It is the date/time that suppliers can view some information about the event. They cannot yet view details or respond to the event.

- **Open Date:** The date/time the suppliers can begin responding to the event.

- **Close Date:** The date/time the event closes for responses.

- **Sealed Bid Open Date:** Select the checkbox if the date/time that you may open sealed bids is the same as close date, if the event is configured to use Sealed Bids. Select a different date if not. You may also select if you want to show the sealed bid open date to the supplier.

- **Q&A Submission Close Date:** Select the date/time that you would like to pre-vent suppliers from submitting questions in the **Q&A** section for the event. You may select the date to be the same as the event close date.

1. An **Event Number** is listed based on your organization configuration.

2. You may enter a Stage Title if the event is configured to allow multiple stages. You may leave this field blank until the next stage is created if you are not sure if the event will require multiple stages.

3. An **Event Number** is automatically assigned.

4. The **Payment** section:

   a. The currency for the event is displayed. This is not editable.

   b. Optionally, enter an **Estimated Value** for the event (if displayed).

5. View or edit configurable options in the **Bid and Evaluation** section. The following are Bid and Evaluation options you may see, depending on your access rights.

   a. View or edit the Sealed Bid option.

       i. Select **Yes** or **No**. You will be configuring **Sealed Bid** date options in the **Dates** section for the event if you select **Yes**.

       ii. You can configure **Sealed Bid** date options in the **Dates** section for the event.

   b. Respond by Proxy.

       i. Select **Yes** to designate the suppliers for proxy bids on the **Suppliers** page. Otherwise, select **No**.

       ii. You will have the opportunity to designate the suppliers for proxy bids on the **Suppliers** page.

   c. View or edit the **Use Panel Questionnaire** option.

       i. A Panel Questionnaire section will display in the event navigation for configuration if you select **Yes**.

   d. View or edit the **Auto Score** option.

       i. If your access is configured to allow Auto Score, you can select **Yes** or **No** to allow Auto Score.   You can choose where to enable auto-scoring:

           - Select **Default all questions to use Auto Score** to enable auto-scoring for event questions.

           - Select **Apply Auto Score at the individual line level** to enable auto- scoring for event line items.

   e. View or edit the **Alternate Items** option.

       i. Selecting **Yes** allows Alternates for each individual item in the **Items** section of the event.

   f. View or edit the **Allow Split Item Quantity** in **Evaluations** option.

       i. The event award may be split among multiple suppliers if you select **Yes**.

g. View or edit the **Enforce Minimum Price** option.

   i. Select **Yes** or **No** if the event type includes an items section. Selecting **Yes** allows you to set minimum prices for item bids.

h. **Confidential Pricing** is enabled for the event:

   i. Select **Yes** or **No**. Selecting **Yes** adds an Event Price Viewers option to the **Users** section to the event. Any users defined in this section will be able to view confidential pricing.

i. View or edit the **Auto Score** option.

   i. You can select **Yes** or **No** to allow Auto Score if your access is configured to allow it. You can choose where to enable auto-scoring:

      • Select **Default all questions to use Auto Score** to enable auto-scoring for event questions.

      • Select **Apply Auto Score at the individual line level** to enable auto- scoring for event line items.

j. View or edit the **Alternate Items** option.

   i. Selecting **Yes** allows Alternates for each individual item in the **Items** section of the event.

k. View or edit the **Allow Split Item Quantity** in **Evaluations** option.

   i. The event award may be split among multiple suppliers if you select **Yes**.

l. View or edit the **Enforce Minimum Price** option.

   i. Select **Yes** or **No** if the event type includes an items section. Selecting **Yes** allows you to set minimum prices for item bids.

m. **Confidential Pricing** is enabled for the event:

   i. Select **Yes** or **No**. Selecting Yes adds an Event Price Viewers option to the **Users** section to the event. Any users defined in this section will be able to view confidential pricing.

6. You can view or edit whether the event is **Visible to Public** in the **Display and Communication** section.

   a. If your Event is in excess of $250,000 **AND** uses federal funds, you must post the event publicly. Select **Yes** and enter an overview in the **Public Event Short Description** field.

7. Manually enter dates in the **Dates** section or use the date picker to select from a calendar. Times are available in the dropdown next to the date:

   a. Select the appropriate **Time Zone**.

   b. Enter a **Release Date** and time, if appropriate.

   c. Enter an **Open Date** and time. The Open Date must be later than the Release Date.

   d. Enter a **Close Date** and time. The Close Date must be later than the Open Date.

   e. Sealed Bids may or may not be used for the event. Here are the steps to take if Sealed Bids are in use for the event:

      i. Select if you want the **Sealed Bid Open Date** to be the **Same as Close Date**.

      ii. Do not select the option if you want a different date. Then, select an appropriate date from the Date picker.

      iii. Select the checkbox if you want to **Show Sealed Bid Open Date to Supplier**.

   f. Select if you want the **Q&A Submission Close Date** to be the **Same as Close Date**. Otherwise, select an appropriate date from the Date picker.

8. Click **Save Progress** and **Next** to continue event configuration.