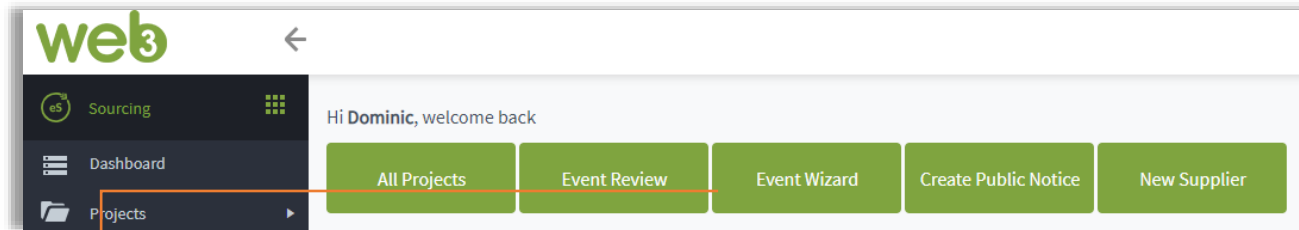# How to Use an Event Wizard

The event wizard provides simple step by step guidance for creating an event, walking you through the following 5 stages:

» Selecting the project the event is under

» The type of event you wish to run

» Whether the event can be copied from a previous one or not

» The details for the event such as the title and close date

» The content for the event such as the questions and suppliers

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How to Use the Event Wizard

To make use of the **Event Wizard**, follow the steps below:

1 Select the **Event Wizard** quick link from your dashboard. This will take you to the event wizard page.

2 Once onto the **Event Wizard**, you will see this timeline which will track your progress through the creation of the event.

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How to Use the Project Stage

The **Project Stage** is where you choose either the existing project the event falls under or whether to create a new project for the event. To **choose an existing project**, follow the instructions below:

1 Select the **Existing Project** button.

2 Select the existing project, using the **+** and **–** buttons to expand and collapse folders.

3 Click **Next** to progress to the next stage of the wizard.

Where should the new event be created?

- Existing Project
- New Project

Top Level Folder
- Archive
- East of Leeds
- P2P Project Imports
- S2C
- SRM Suppliers
- Training
- web3
  - AA test RFP
  - AMCO
  - ddb
  - ExoHouse
  - Martin-Baker Demo Reverse Auction

Cancel   Next

To **create a new project** for the event, use the following instructions:

Where should the new event be created?

- Existing Project
- New Project

Project Name: Laser Printer Project
Baseline Value:
Project For: Wax Digital

Cancel   Next

1 Select the **New Project** button.

2 Enter the **Project Name**, **Baseline Value** and **Project For.**

3 Click **Next** to progress to the next stage of the wizard.

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How to Use the Event Type Stage

The **Event Type Stage** of the event wizard is where you choose which type of event you wish to create. To choose the appropriate/desired event type, follow the instructions below:

1 Select the **Event Type** using the radio button next to the relevant line. If you are unsure of what any of the event types are, please refer to the table below.

What is the event type that you would like to run?

○ ITT - Invitation To Tender
○ RFI - Request For Information
○ RFP - Request For Proposal
○ RFQ - Request For Quotation
○ PQQ - Pre-Qualification Questionnaire
○ EoI - Expression of Interest
○ Survey

○ Forward Auction
○ Reverse Auction
○ Japanese Auction Forward
○ Japanese Auction Reverse
○ Dutch Auction Forward
○ Dutch Auction Reverse

Previous   Cancel   Next

2 Click **Next** when you have chosen the correct event type to advance to the next stage of the wizard.

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How to Use the Source Event Stage

The **Source Event Stage** allows you to decide whether to copy any details or content from a previous event or whether to create this event entirely from scratch. To do this, use the following steps:

1 Select **Copy From Existing Event** using the radio button.

2 Select the existing event, using the **+** and **–** buttons to expand and collapse folders.

3 Click **Next** when you have chosen the correct event to advance to the next stage of the wizard.

To create the event from scratch, follow the instructions below:

1 Select **New Event** using the radio button.

2 Click **Next** to advance to the next stage of the wizard.

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How to Use the Details Stage

The **Details Stage** of the event wizard is where the key top-level information is captured. To complete the Details stage, follow the instructions below:

1 Enter a **Name** and **Description** that clearly define the event.

2 Select the **Time Zone** for the event. The close date of the event will use this time zone.

3 Select whether this should be a **Sealed Event** or not. A Sealed Event is where the responses to the tender are kept sealed until the tender has closed and at this point, a specific user(s) will have the power to open the responses.

Please fill out the new events details.

Name: Swinton Branch Laser Printer RFP

Description: Tender for 10 new laser printers for the Swinton branch.

Default Time Zone: (UTC) Dublin, Edinburgh, Lisbon, London

Sealed Event: ☐

Close Date: 31/12/2018   10:00

Previous   Cancel   Next

4 Select the **Close Date** and **Time** for when you would like the tender responses to be completed by.

5 Once you are happy with the details, click the **Next** button.

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How to Select the Content for the Event

The final stage in the event wizard is the **Content Stage**. The content is the **Suppliers**, **Questions**, **Attachments**, **Exchange Rates** and **Lines and Lots** that make up the event. To **use the Content stage**, follow the instructions below:

1 Select whether you wish the **Suppliers** to be selected from the source event, or whether you wish to start a new list.

2 Select whether you wish to use the questions from an already-built source, or whether to create the questions from scratch.

3 Choose the types of **attachments** you wish to add to the event.

Note: Certain options will be unavailable if you have selected to create an entirely new event at the **Source Event** stage as there will be no content to copy over from a selected **Source Event**.

Please select sources for the initial content of the new event

Suppliers:
- ○ Copy All
- ○ Copy Awarded
- ○ Copy Responded
- ○ Imported Suppliers
- ● Blank List

Questions:
- ○ Copy All
- ○ Empty
- ○ Import File
- ● Template

Exchange Rates:
- ○ Copy All
- ○ Event Currency Only
- ● Project Default

Lines and Lots:
- ○ Copy All
- ● Blank List
- ○ Import File

[Previous] [Cancel] [Finish]

4 Choose the **Exchange Rates** you wish to use for the event.

5 Select the source you wish to use for the **Lines and Lots**, or whether to build them from scratch.

6 Finally, once you are happy with all of the information that you have entered into the event wizard, click the **Finish** button to create the event. From here you will be able to edit the information from within the event.