Supplier Guide Ivalua Sourcing

Ivalua Sourcing for Suppliers

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Participating in Souring RFx's

This guide is for suppliers who want to participate in Ivalua Sourcing RFx.

In Sourcing, suppliers can respond to RFIs, RFQs and RFPs; communicate with buyers; import and export RFx content; submit new, revised and alternate proposals.

This guide applies to:

- Ivalua Sourcing

Sourcing RFx Types

Ivalua Sourcing supports buyers to create and run RFx's in which they exchange business information with companies like yours. Depending on the type of information Ivalua Sourcing buyers want to collect, they create different RFx types using Ivalua Sourcing.

Quick Bid

Buyer uses a Quick Bid to get proposals from suppliers, like RFQ.

Cost Breakdown - CBD

Buyer uses Cost Breakdown to compare the submitted prices from the participants with a reference price.

Request for Information - RFI

Buyers use a Request for Information (RFI) to gather suppliers' capabilities. Helps to evaluate suppliers before RFP or RFQ.

Requests for Quotation - RFQ

Buyers use a Request for Proposal to get detailed proposals from suppliers. Used when price is the primary factor.

Request for Proposal - RFP

Buyers use a Request for proposal (RFP) to create a questionnaire with sections, and/or line items to collect pricing information. Buyers can weigh and grade participant responses and create an overall score for each participant.

PM - Double envelope

Activates so called technical and financial envelops, this means that the participant only can view one envelope at a time and submit one response, one by one.

Participating online

You participate in RFx by logging into Ivalua Sourcing.

Sourcing RFx statuses

- Open for Bidding – the RFx is open for bidding.
- On Hold – the RFx is on hold due to that the buyer is performing changes.

- Proposals Available – the RFx is finished.
- Closed – Bid due date has passed.

What buyers can see about your RFx participation

Ivalua Sourcing logs the significant RFx activates performed by participants during an RFx. Buyers can use RFx monitoring/Discussions to verify that users participated, to see when number of logins, to see when they downloaded or uploaded documents. Ivalua Sourcing logs the following participant related actions:

- Logging in of the RFx.
- Sent messages in Discussions.
- Invitation Acknowledgement.
- Submitting intention to participate in the event, WILL BID / Declined Participation.
- Submitted Proposal.

The buyer cannot see the submitted response before the RFx end date.

Notifications sent automatically from Ivalua Sourcing

Ivalua Sourcing automatically generates notifications to inform you about the status of an RFx.

For example:

- When a buyer publishes an RFx, the system automatically sends invitation email to invited participants.
- If a buyer put on hold or cancels an RFx while in progress, the system automatically sends participants email notifications. Ivalua Sourcing sends notifications as emails.

How to view your Sourcing RFx's

Context

When a buyer invites a supplier to participate in an RFx (Request for information/quote/proposal), an email notification is sent to the supplier contacts selected by the buyer.

You can access an RFx in one of 3 ways:

- **Email invitation to participate:** click the link provided in the email message.

- **Homepage**: click the RFP in Progress counter to access the RFx list, and then click the label of the RFx or its *Edit* icon to open it.

- **Main navigation**: go to Sourcing > Manage Proposals to access the RFx list, and then click the label of the RFx or its *Edit* icon to open it.

At first, only the contacts selected as recipients by the buyer may access the RFx. However, these contacts can later add colleagues to the RFx team, allowing them to access and respond to the RFx.

Proposal Progress Status and Action to Perform

Actions to be performed	Prop. progress Status	Visual cue
Acknowledge receipt	Awaiting Acknowledgement	🔴⚪⚪
Conform intent to participate	Received Acknowledgement	🔴⚪⚪
Prepare response	New Proposal	🔴⚪⚪
	Will Respond	⚪🟡⚪
	In progress	⚪🟡⚪
Submit response	Submitted Proposal	⚪⚪🟢
(End of process)	Will not Respond	🔴⚪⚪

Content of an RFx Folder

The request for quote/proposal folder includes the following tabs:

Tab	Description
Overview	This tab displays the RFx general information and links to attachments, questionnaire and / or quotation form, depending on the RFx type. **NDA** (optional): When signing a non-disclosure agreement is required by the buyer, you must sign and provide the document to the buyer before you can be invited to the RFx. Follow the instructions given to send the signed document to the buyer. **Acknowledgement** (optional): When the buyer requires that you acknowledge receipt of the RFx, you must acknowledge receipt and confirm or decline participation in the RFx.
History	By default, the History tab lists the **Canceled**, **In progress**, and **Submitted** proposals for the current round. By adjusting the search filters, you can access all proposals created on all the rounds in the RFx.
Proposal Information / Info	This tab together with the I*tems and Questionnaire* tabs allows you to provide the requested elements in your answer. In this tab, you will more specifically provide basic information related to your response, such as label, validity end date, and summary, as well as attachments.
Discussions	This space can be used to communicate with the team in charge of the RFx (request for clarification, for example). Your communications with the Team in charge of the RFx are not visible to the other participating suppliers.
Items	This is where you can provide your quote for the specific materials or services listed.
Questionnaire	This is the buyer's questionnaire form that you must respond to as part of your proposal.
My Team	When the buyer sends out the RFx, they select one or more contacts from known contacts who were initially invited to the RFx. Depending on your needs, the *My Team* tab allows initially invited contacts to define a working team by adding/removing users.

Before you can be invited to the RFx and submit responses

Signing and submitting the NDA to the responsible buyer

When the buyer requires you to sign a Non-Disclosure Agreement. You must provide a signed document before you can be invited to the RFx.

Reviewing the RFx before acknowledging participation

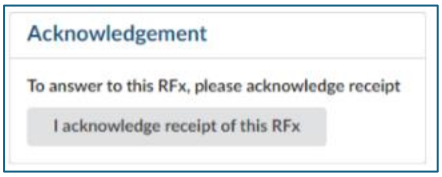
On the Overview tab, review the RFx General information and *RFx Documents* sections.

Review the Questionnaire and Items tabs as well.

If anything remains unclear, use the Discussions tab to ask for additional clarification.

Acknowledging Receipt and Participation

This action may be required or optional. When it is required,
an Acknowledgement section is displayed on all tabs, and you must complete this step before you can respond to the RFx.



1. Click the I acknowledge receipt of this RFx button. This will reveal a new set of options whereby you can express whether you intend to participate or not:
    a. Select the WILL BID option, if you think you will respond to the RFx.

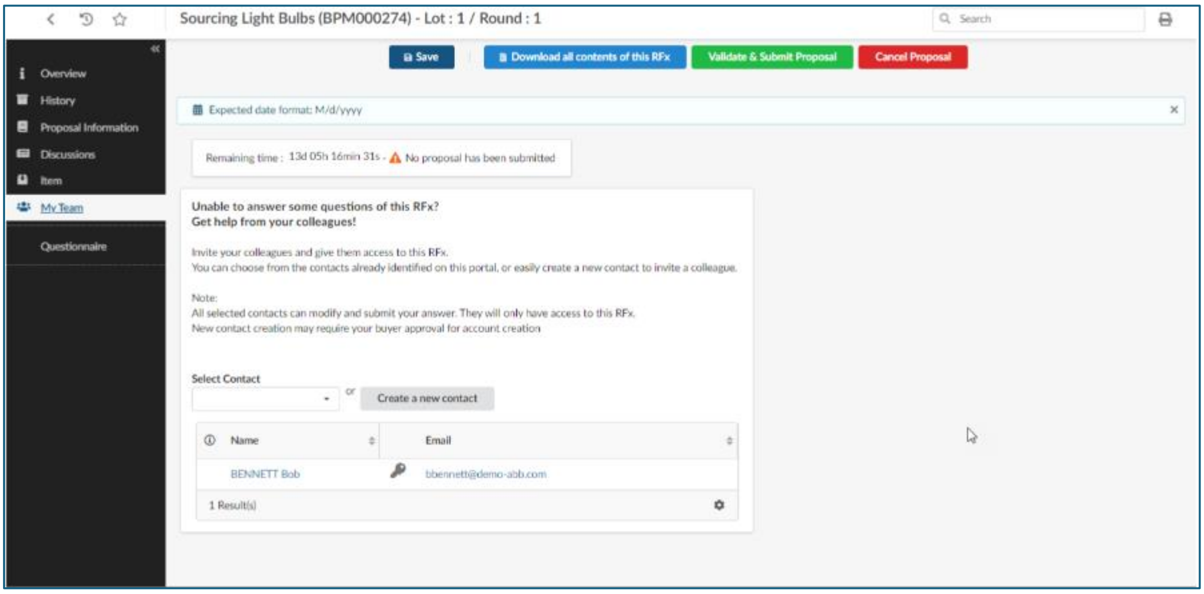
    b. Select the NO BID option, if you think you will not respond to the RFx. When you click this option, an optional Reason field will allow you to indicate why you cannot participate to the RFx.

2. Click the Submit button.

Giving access to the RFx to other users from your company

When setting up the RFx, the buyer selects one or more contacts from your Supplier Record and chooses one "main" contact. At the launch of the RFx, all selected contacts will be notified and be granted access to the RFx.

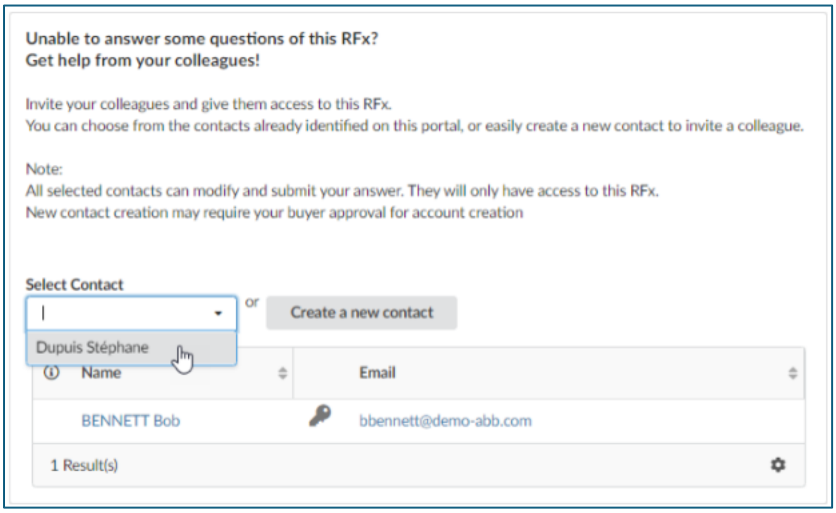
On your side, you can manage the team of users contributing to this RFx from the My Team step of the RFx.



The My Team step allows you to perform the following:

Adding an existing contact

In the My Team tab, choose the contact you want to add from the Select contact drop-down list (available only if there are existing contacts that can be added from your supplier profile).



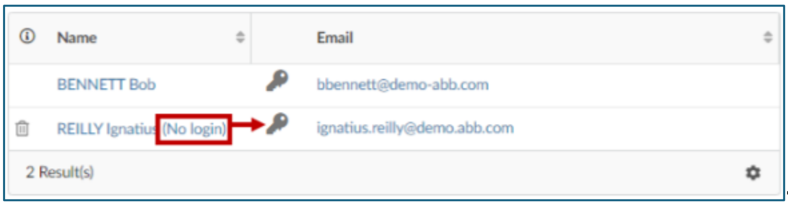
Creating a new contact

On the My Team tab of the RFx, click Create a new contact and complete the form that displays.

Important! This new contact cannot log in to the application as is: login credentials need to be generated first.

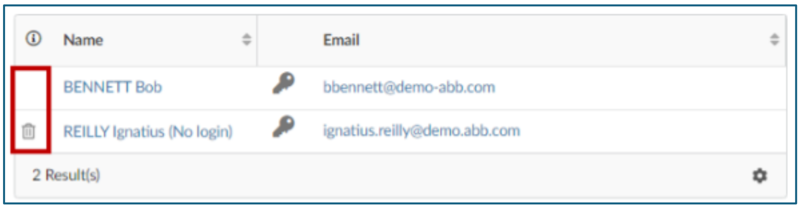
Generating login credentials for a contact

Should a contact you select or create have no login (meaning no user account enabling them to access the application), this will be indicated next to their name. Click the *Key* icon to create the missing login: the contact will receive an email with the necessary login credentials, and they will be granted access to the RFx.



Removing a contact

You can remove any contact by clicking their Delete icon, except the contact the buyer has identified as their main contact (no Delete icon).

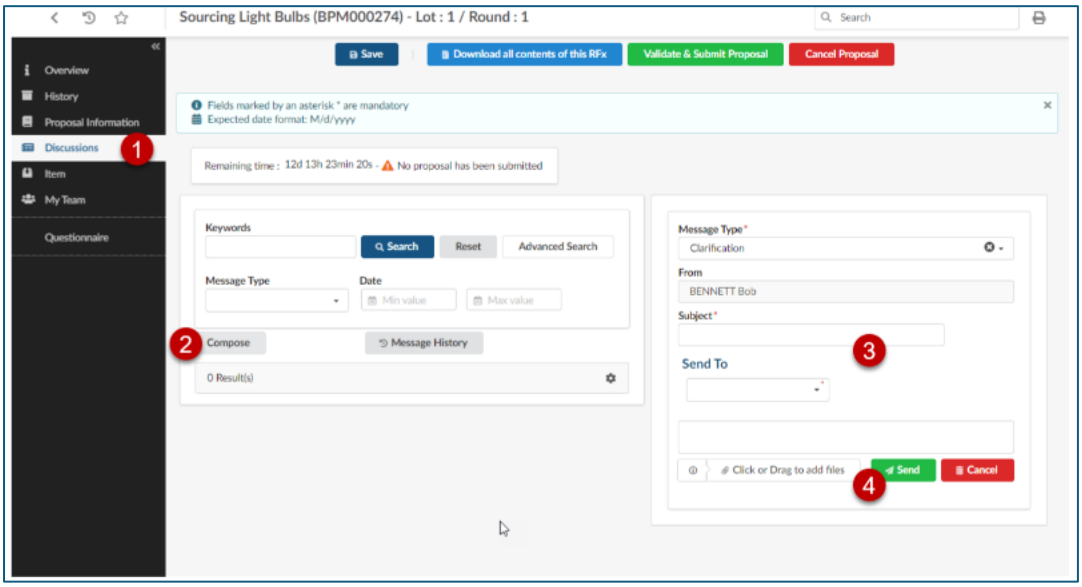


Discuss with the buyer (clarifications, inquiries, etc

The Discussions tab allows you to exchange messages with the buyer in charge of the RFx. These messages remain confidential and are only visible to you and the buyer. Once sent, messages are logged in the list of exchanged messages.

Creating a message

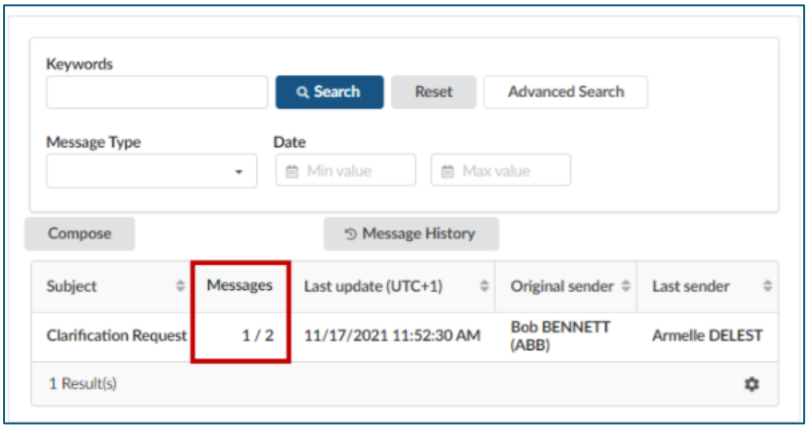
1. In the RFx, display the Discussions tab
2. To send a question or a message to the buyer, click on Compose button a message creation area is displayed.



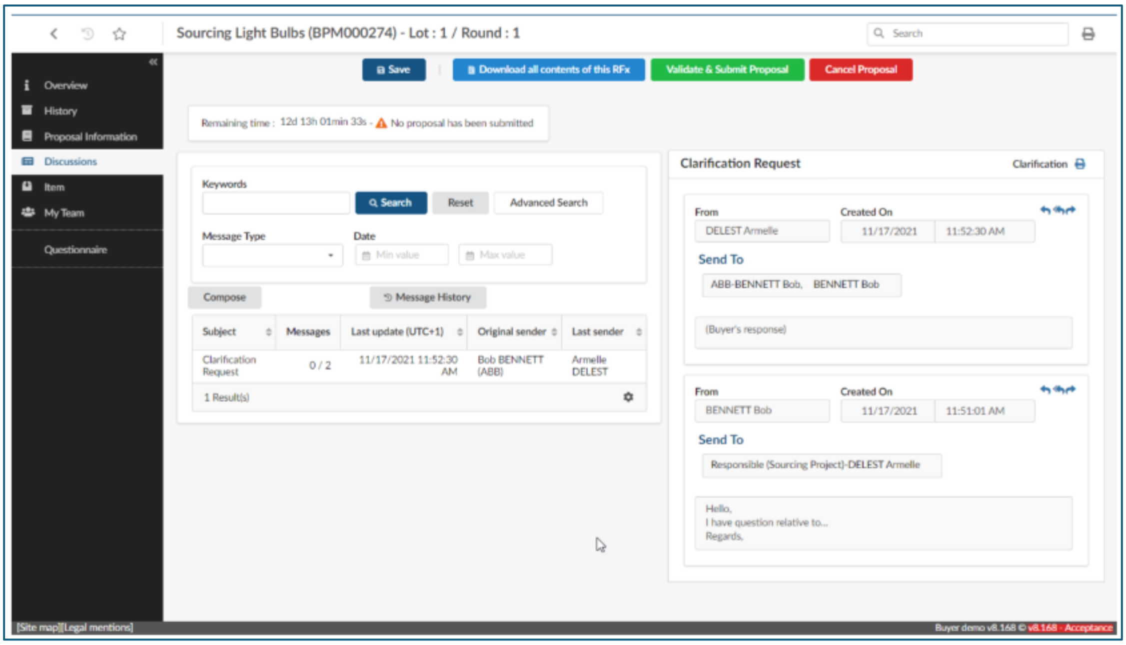
3. Fill in all the fields:
    a. Select the message type (Clarification)
    b. Enter a Subject/Title to the message
    c. Select the Send To recipient(s) of the message
    d. Enter your message
    e. To add attachments to your message, select them in your file explorer and drop them to the drop zone, “Click or Drag to add file”.
4. When your message is ready, click on the Send button. The message is sent to the selected recipients and saved in the message list

Reading a message

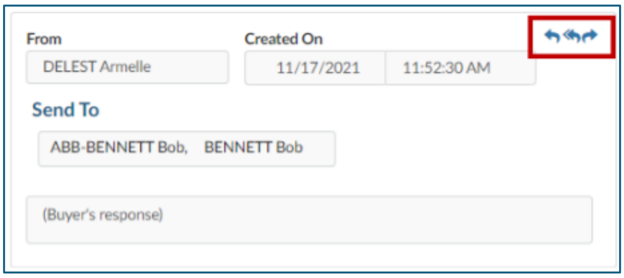
Unread messages are indicated in the Message column, 1/2 meaning that you have one unread message out of two messages.



To read a message, click on it (the entire line is clickable). The Thread and its messages are displayed.

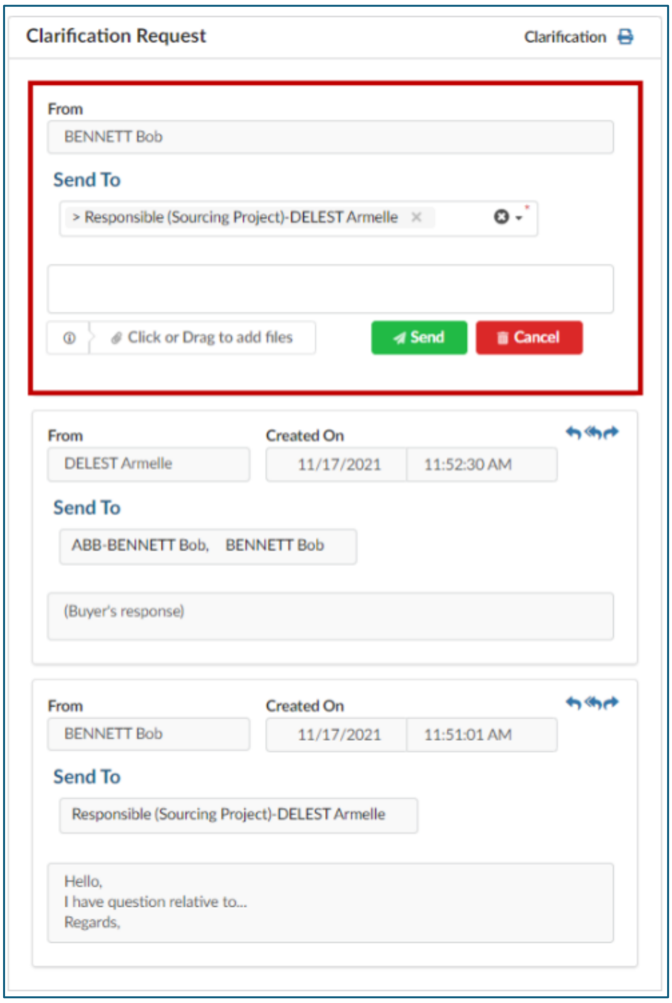


Replying To or Forwarding a Message



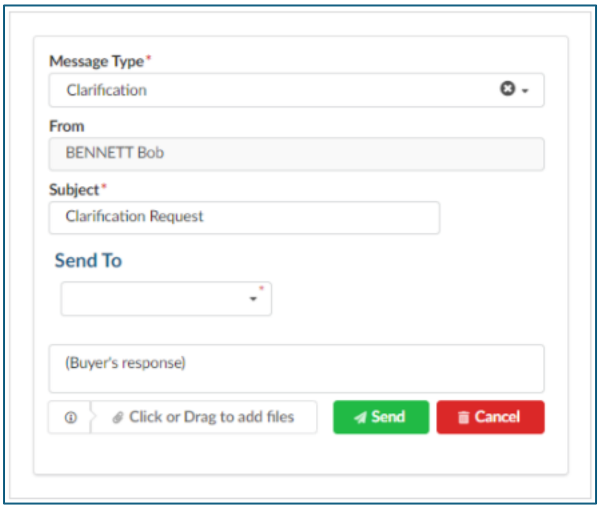
Use the Reply, Reply all, and Forward icons:
- To reply to the sender of the message, click on the Reply icon.
- To reply to the sender of the message and to all recipients, click on the Reply all icon.
- To forward the message, click on the Forward icon.

If you choose **Reply** or **Reply All**, a new message creation area appears above the received message. Use this area to write your answer (Message) and/or attach a file. Click on Send to send your reply.



If you choose **Forward**, the received message is displayed in edit mode, with yourself as the sender.

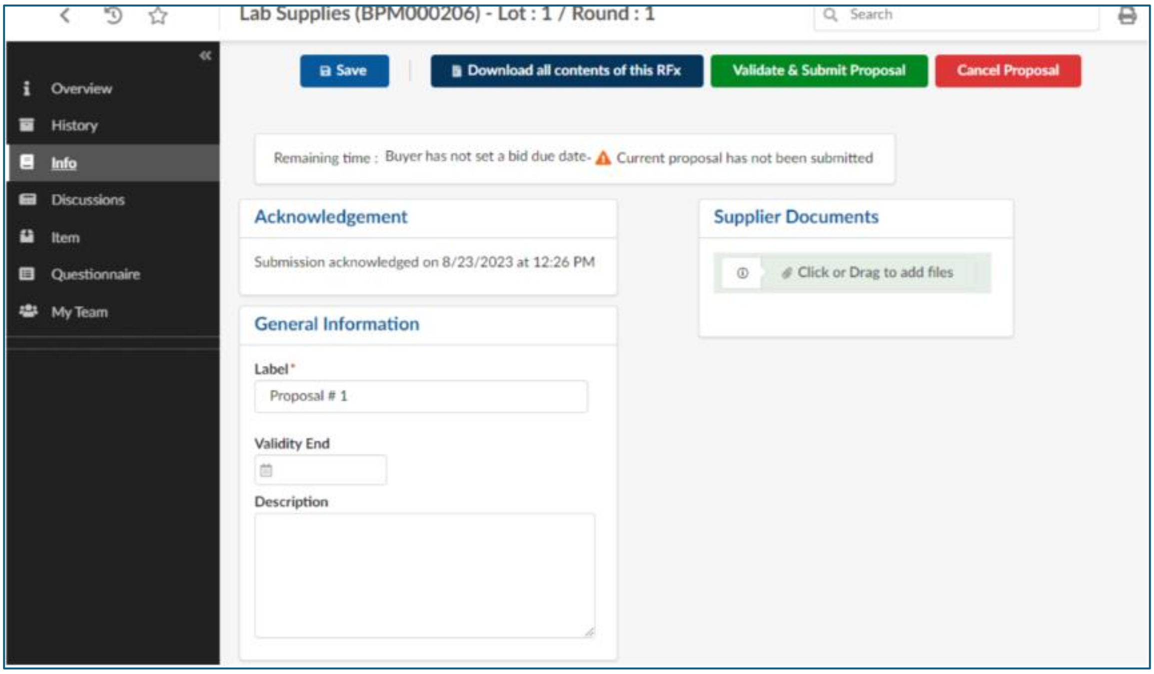
Select the recipient from the Send To drop-down list and click Send.



Preparing a response/Proposal

Creating a new response

1. In the RFx, display the Proposal Information (Info) tab.



1. Give a name to your proposal (field)
2. Enter the proposal validity and date
3. Enter a Description
4. Click the Save button, Your proposal is now created.
   Youn can now start entering information in the proposal:
   a. Quoting
   b. Attaching documents to your response
   c. Responding to the Questionnaire

You can also close the RFx at any time and re-open it later and resume completing it; just make sure you save any data you entered.

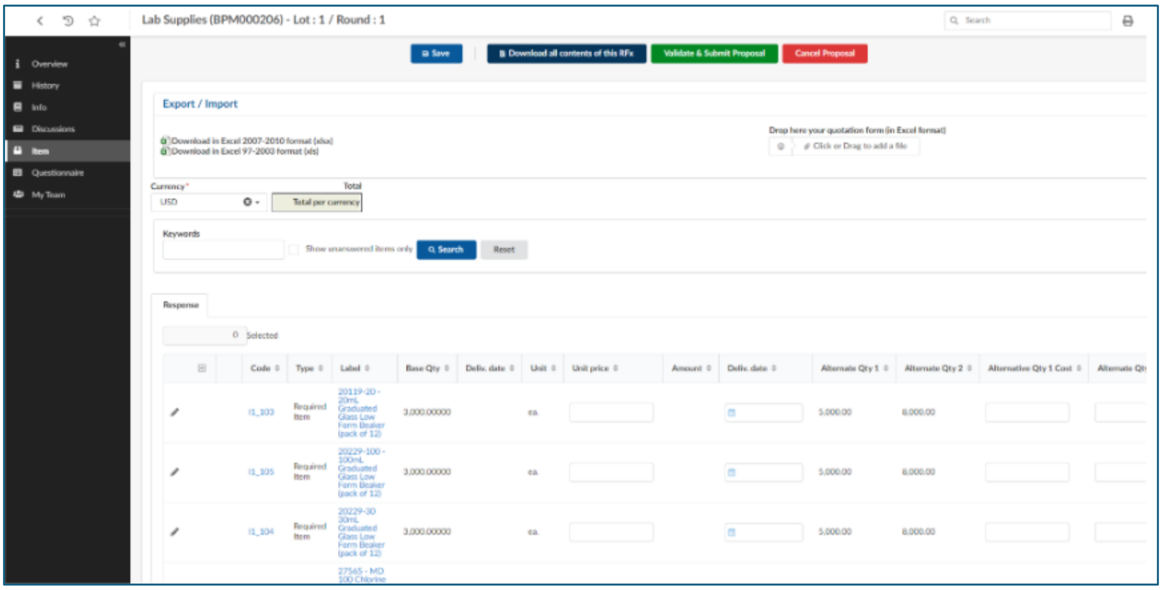
Other actions you may perform:

- Cancelling a Proposal
- Viewing the Response/Proposal History

Quoting

You can directly enter your prices in the items tab or upload an MS Excel file instead.

1. In the RFx, display the Items tab



2.In the currency drop down list, select the currency to use.

3. For each item, fill in the open fields.

There can be multiple response grids to address different types of items.

4. Click in the Save button. The total amount is calculated automatically.

Quoting Offline (MS Excel)

1. In the RFx, display the Items tab, display the Items tab.

2. Click on the Download in Excel format and open the downloaded file.

The Excel file the Excel file includes several tabs (Excel sheets):

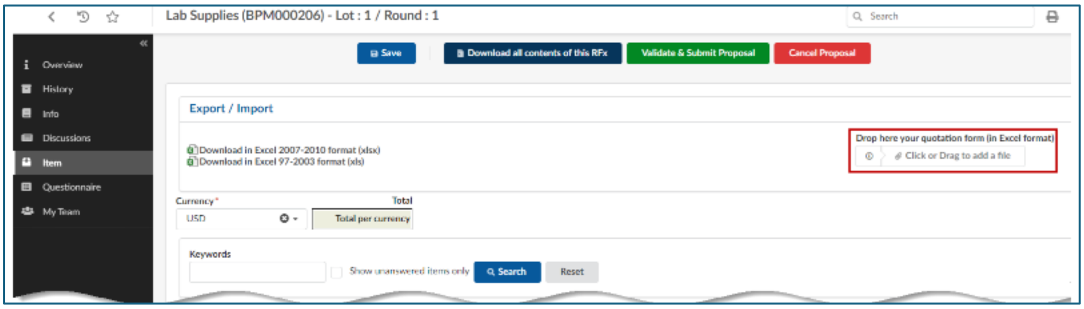
- **Instructions: contains instructions how to use the file, we recommend you read this tab very careful.**
- Response grid: the file includes one tab per response grid.

Code	Type code	Item	Order	Deliv. date	Unit price	Qty	Amount	Deliv. date_1	Unit
I1	Required Item	Item 1	1	10/16/2015	630	50	31500	5/5/2014	Each
I2	Required Item	Item 2	2	10/16/2015	50	100	5000	5/5/2014	Each

3. In each for (grid), fill in the blank fields.

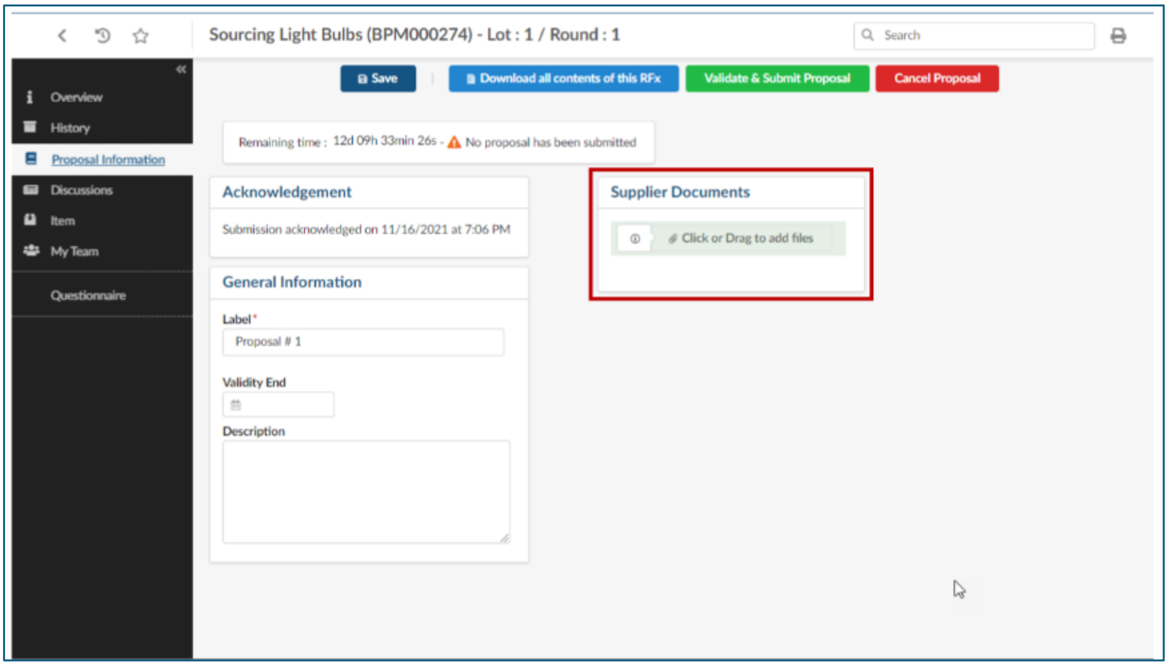
4. Save the Excel file to a location of your choice.

5. Once the form is filled, uploaded to Ivalua. To do this, select the file in your explorer and drop it in the Export/Import section in the upper right part of the Items tab.

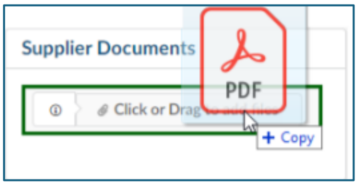


Attaching documents to your response

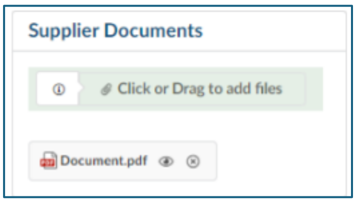
1. In the RFx, display the Proposal information (Info) tab



2. Use the Supplier Documents section to add attachments.



Once attached, documents are listed in the Supplier Documents section.



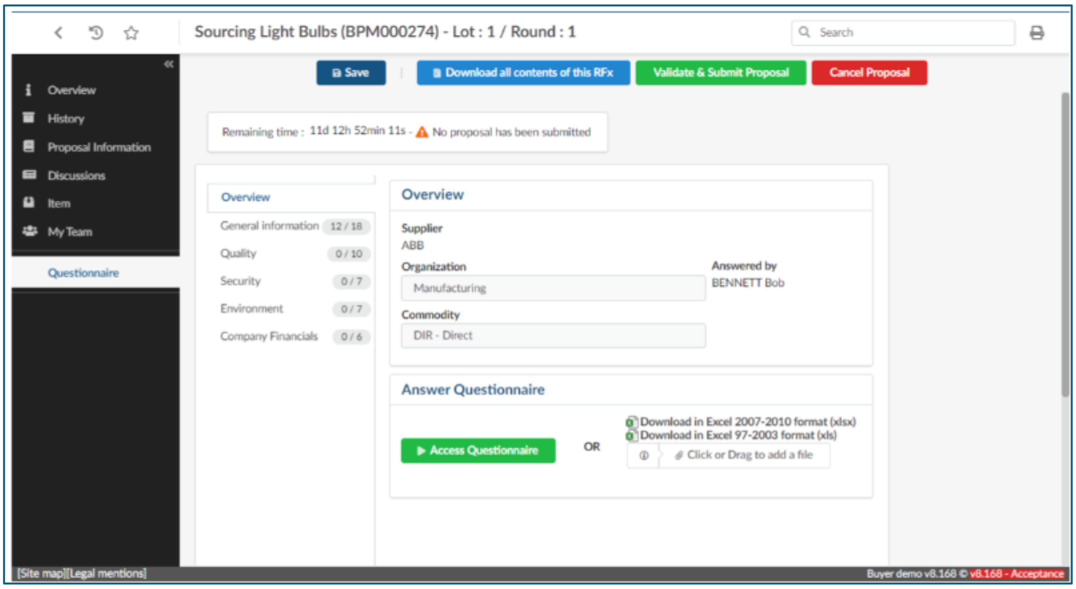
Responding to the Questionnaire

If the buyer has attached a questionnaire to the RFx (RFI and RFP only), it will be available on the Questionnaire tab.

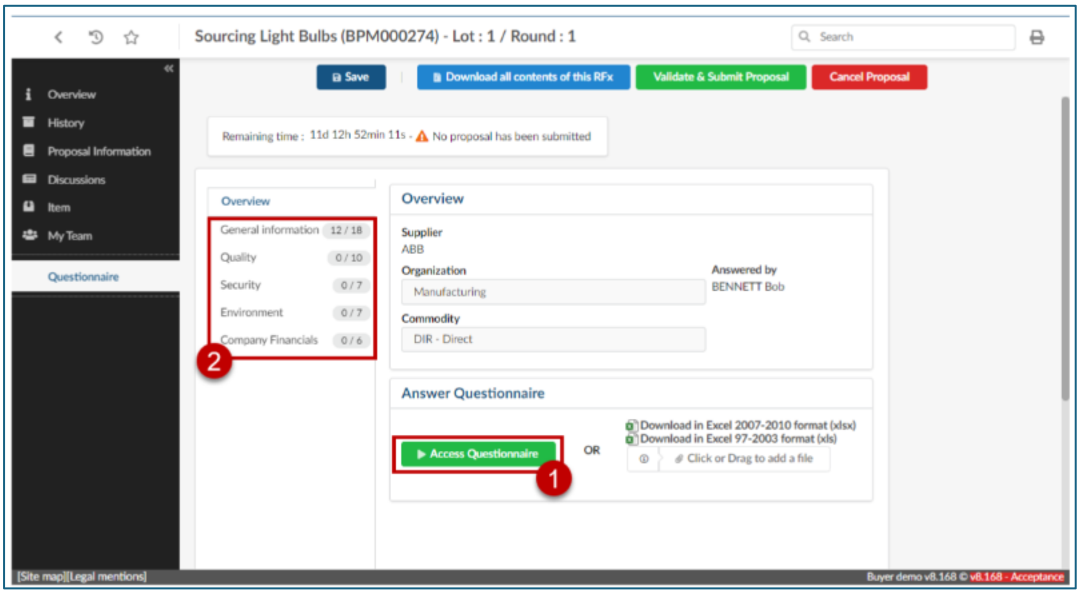
You can respond to a questionnaire directly from the Questionnaire tab or via an MS Excel file.

Responding Online

1. In the RFx, display the Questionnaire tab.



2. Click the Access Questionnaire button (1) to access the first section/tab of the questionnaire tabs (2) to navigate from section to section.



3. Complete the questionnaire.

4. Save.

Responding Offline (MS Excel)
On the Questionnaire tab, click the link Download in Excel format and open the downloaded file.

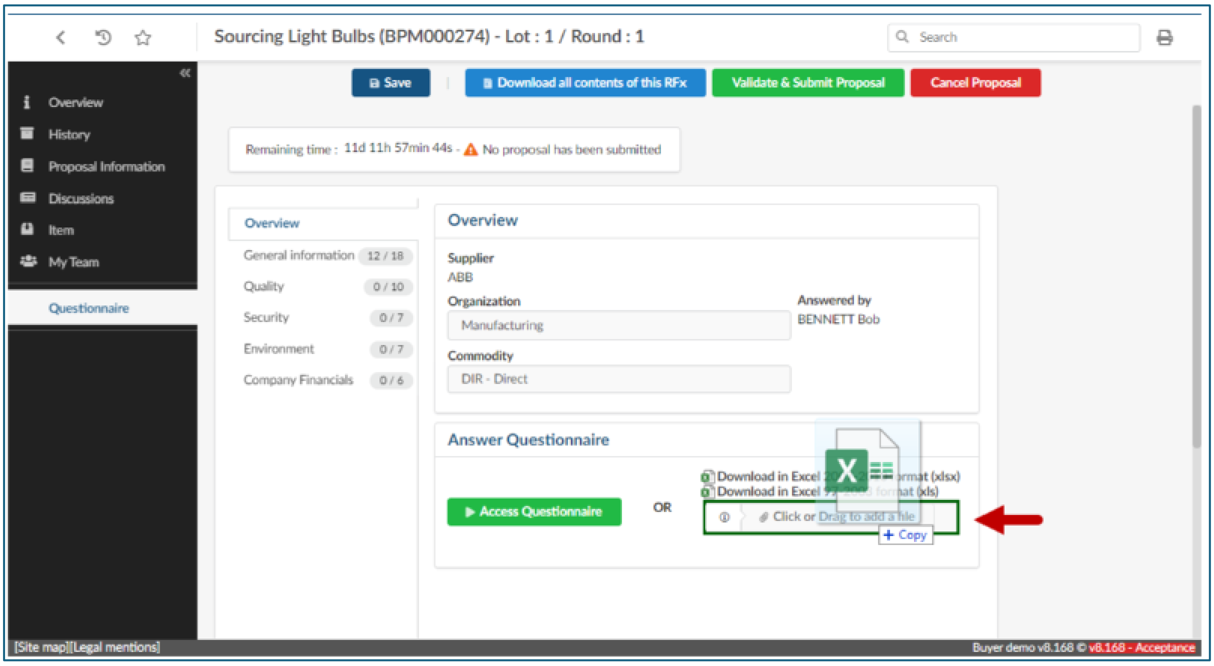
The Excel file includes several tabs:

a) instructions contain guidance on how to use the file.

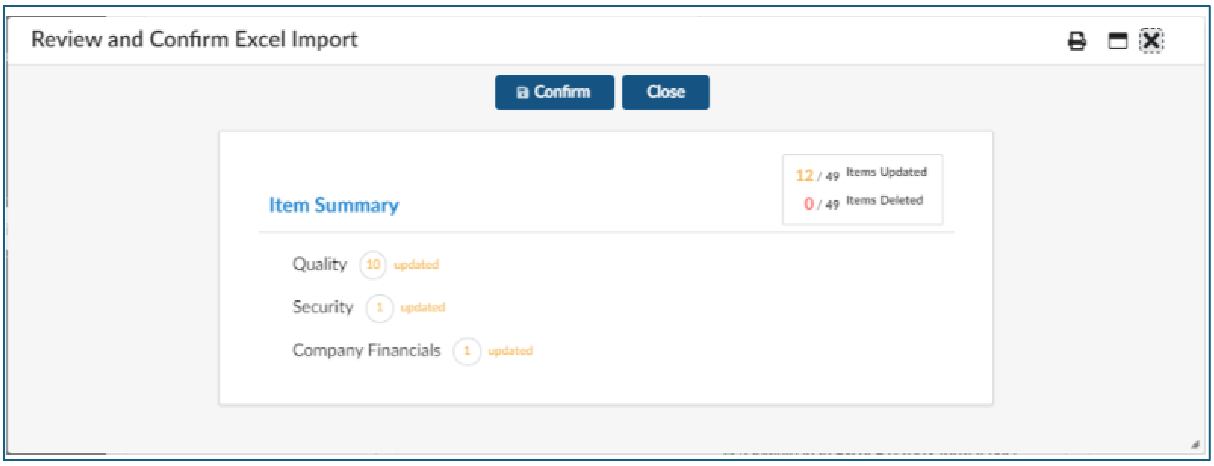
b) One tab per questionnaire section.

1. In each questionnaire section tab, fill in the blank fields (fields with a gray background are non-editable).

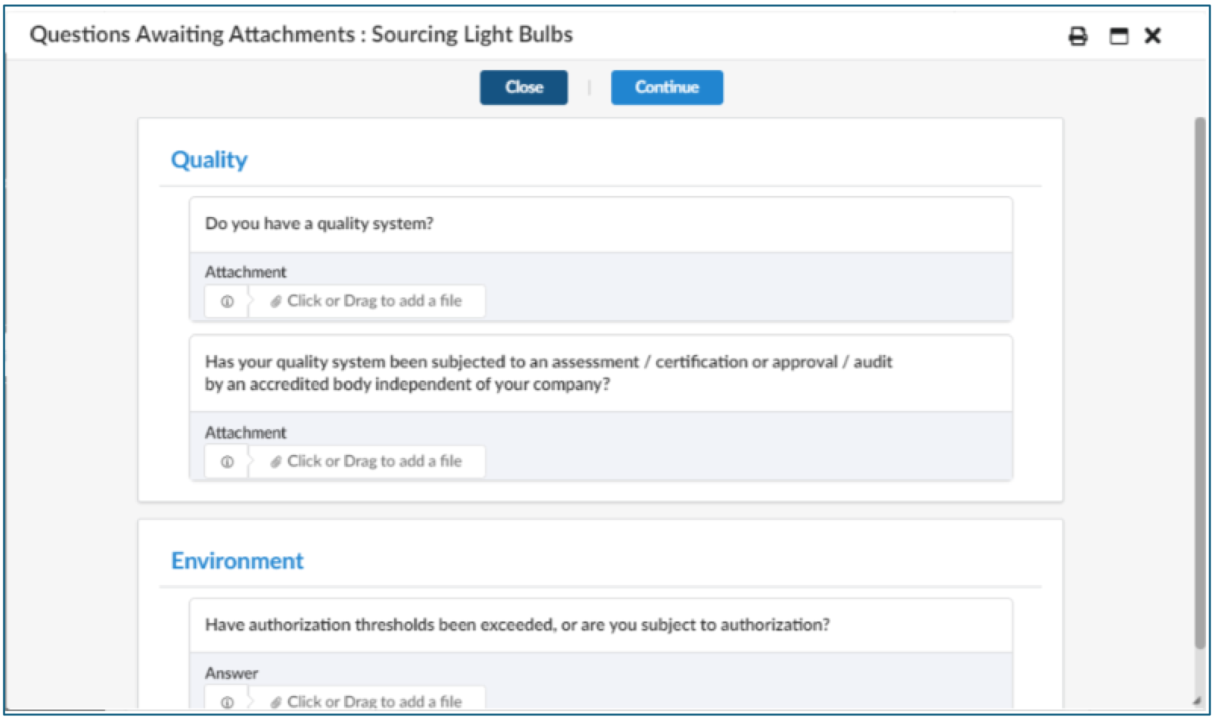
2. Save the completed Excel file to your Ivalua RFx proposal by dragging it from your File Explorer and dropping it onto the dedicated drop zone, "Click or Drag to add file".



A summary of questionnaire items updated is displayed.



3. Review and click Confirm.
   If any questionnaire item has the Upload attachments? Column set to Yes, the window Questions awaiting Attachments window is displayed.



4. For each questionnaire item, drag the corresponding file from your File Explorer and drop it onto the dedicated drop zone, “Click or Drag to add file”.
5. Click Continue.
   The questionnaire answers and attachments are imported into the online questionnaire.

Cancelling a Proposal

1. Click on the Cancel Proposal button.
   A message is displayed, inviting you to confirm your request.

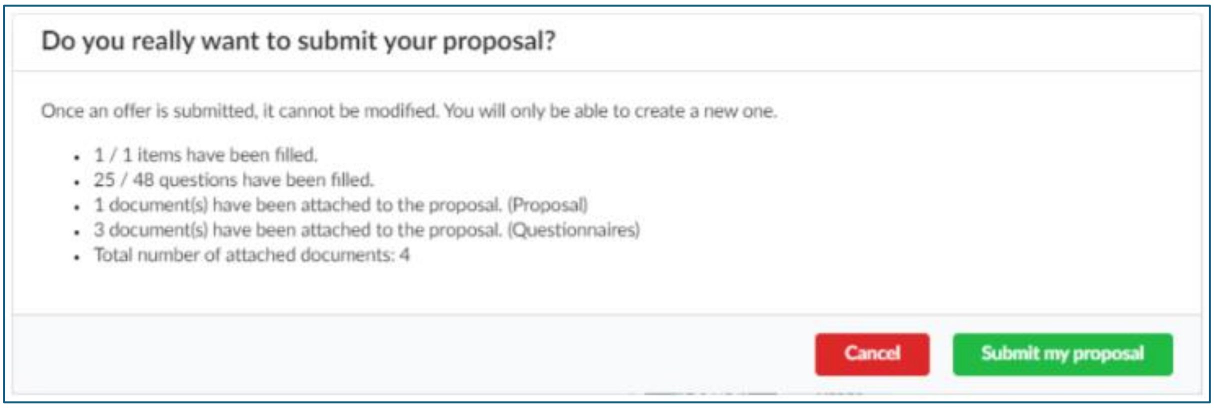
2. Click OK. The response is now cancelled.

Submitting your Response/Proposal

Validating and Submitting a Response/Proposal

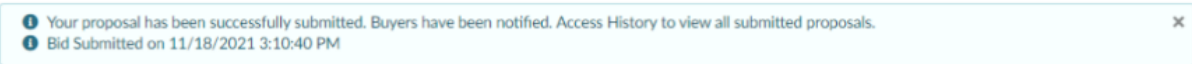
Once your proposal is finalized (that is, item quotation form and questionnaire (if included in the request) are completed, you can submit your proposal to the buyer.

1. Click the Validate & submit Proposal button.
   A message is displayed. It presents an overview of completed items.



Review these elements before submitting your response, since a submitted response is no longer editable.

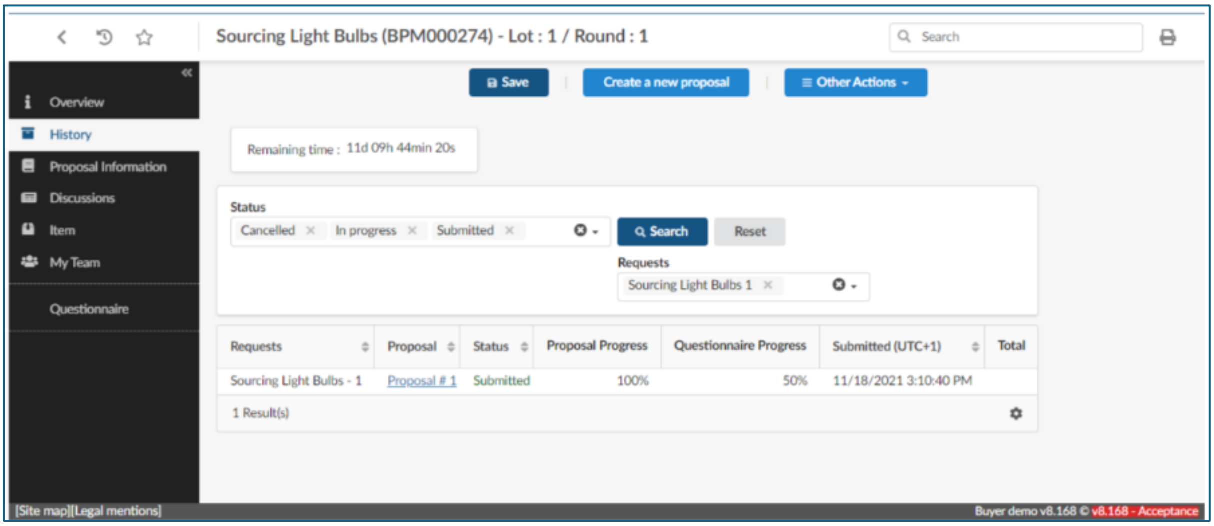
2. Click the Submit your proposal button.
   A message confirms that your proposal has been taken into account.



Viewing the Response/Proposal History

Each RFx folder includes a History tab. All the responses created under this folder are logged in the History tab, regardless of their status. By default, only proposals from the current round with an *In progress* or *Submitted* status are displayed. By adjusting the search filters, you can access all proposals created on all the rounds of the RFx.

The *History* tab allows you to track your bid's status.



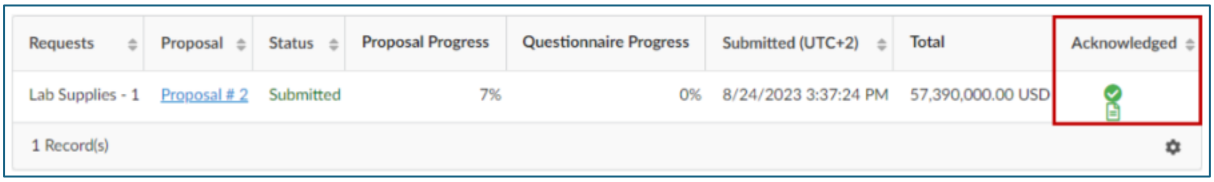
To open a proposal from the *History* tab, click its name.

Buyers' acknowledgement of Receipt

When creating the RFx, the buyer may have planned to acknowledge receipt of your answer. When this is the case, the message that is displayed during the submission of your response will say so:

Your proposal has been successfully submitted. Buyers have been notified. They will acknowledge receipt of the proposal.
Access History to view all submitted proposals.

On the History tab, when the buyer has acknowledged receipt of your reply, this is indicated by the green checkmark icon in the Acknowledged column:



Requests	Proposal	Status	Proposal Progress	Questionnaire Progress	Submitted (UTC+2)	Total	Acknowledged
Lab Supplies - 1	Proposal # 2	Submitted	7%	0%	8/24/2023 3:37:24 PM	57,390,000.00 USD	

1 Record(s)

You can display the acknowledgment date by hovering the mouse pointer over the icon.

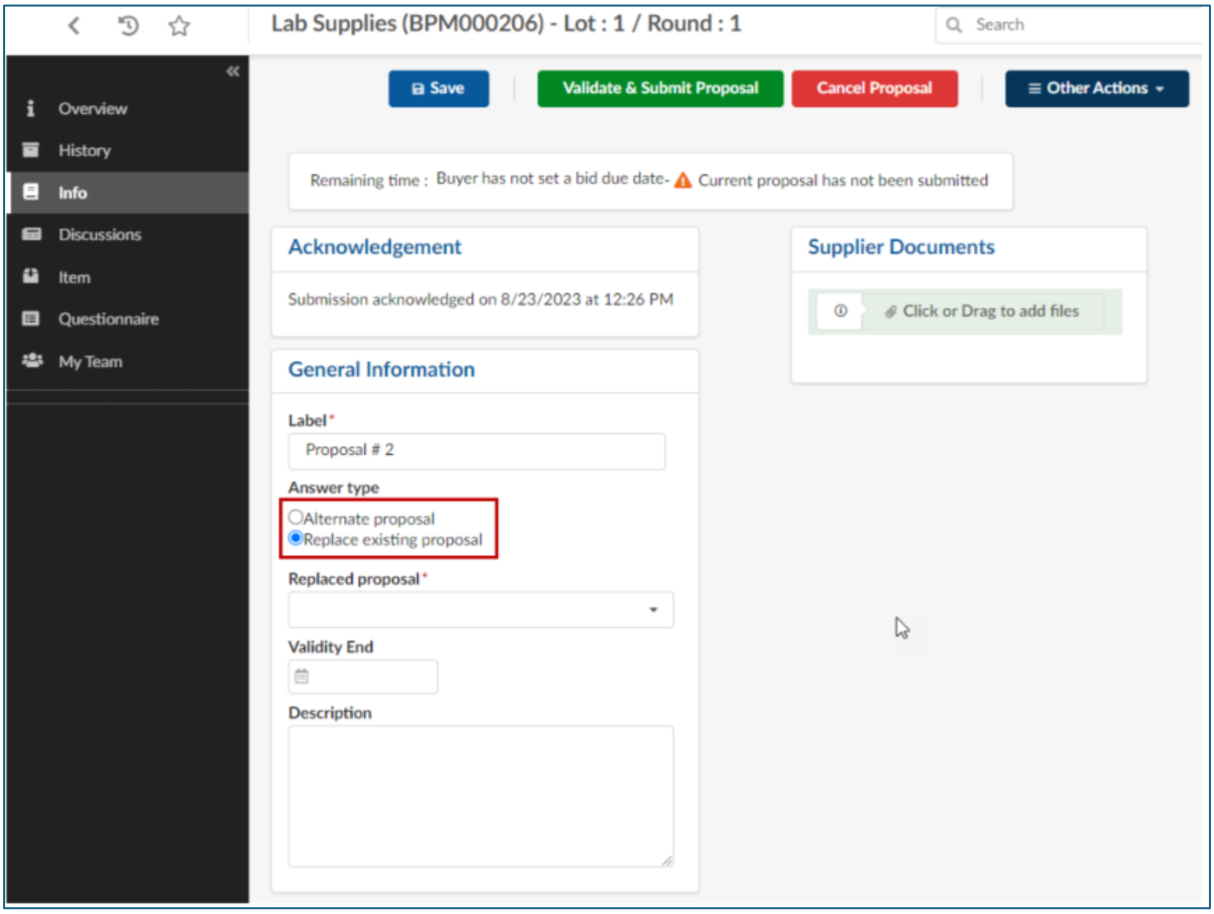
Submitting Alternate or Replacement Response/Proposals

You can submit multiple responses on the same lot/round. If you want to create a new response when you already have validated at least one response, you must specify whether the new response is a new alternative to existing proposals or if it replaces a response.

1. Open your proposal and display the proposal Info tab.

2. Click on the Create a new proposal button.

3. In Answer type, specify if it is an alternative answer to existing responses or if it replaces an earlier response (specify what response from the drop-down list).



4. Build your response:
   a) Quote items
   b) Answer Questionnaires
   c) Add attachments

5. Click the Save button.

Creating a New Response/Proposal Based on your Previous One

You can create a new response by duplicating a previous response (submitted responses only).

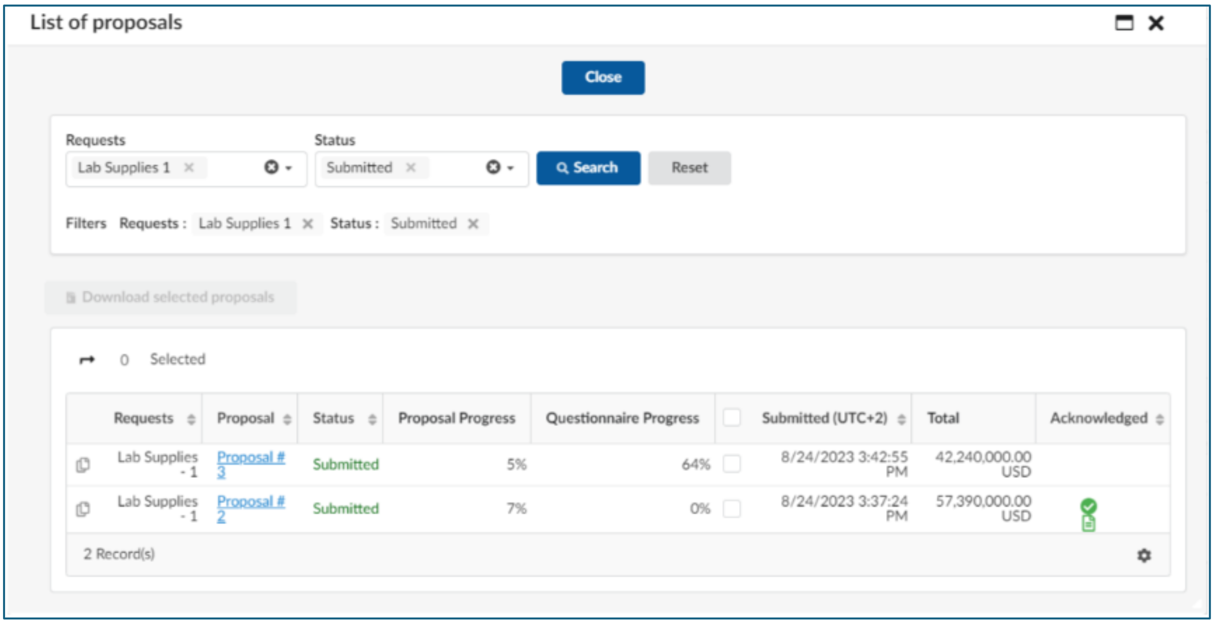
During duplication, all data is included: general information, quotation form (filled), questionnaire answers and attachments. The data can then be modified.

To duplicate your last submitted bid, click the Other Actions > Copy last submitted proposal button.

To duplicate any bid:

1. Click the Other Actions > Copy an existing proposal button.

   The List of proposals window is displayed. It provides a list of responses that you can duplicate. By default, the list is filtered to show submitted responses of the current round; you can change filters to show responses from other rounds and responses in other statuses. You can view these responses by clicking their label.



2. Select the response to duplicate by clicking its icon. A message is displayed, inviting you to confirm your request.

   A new response is created, containing the copied response elements.

3. Click on the OK button.

4. Make the changes you wish.

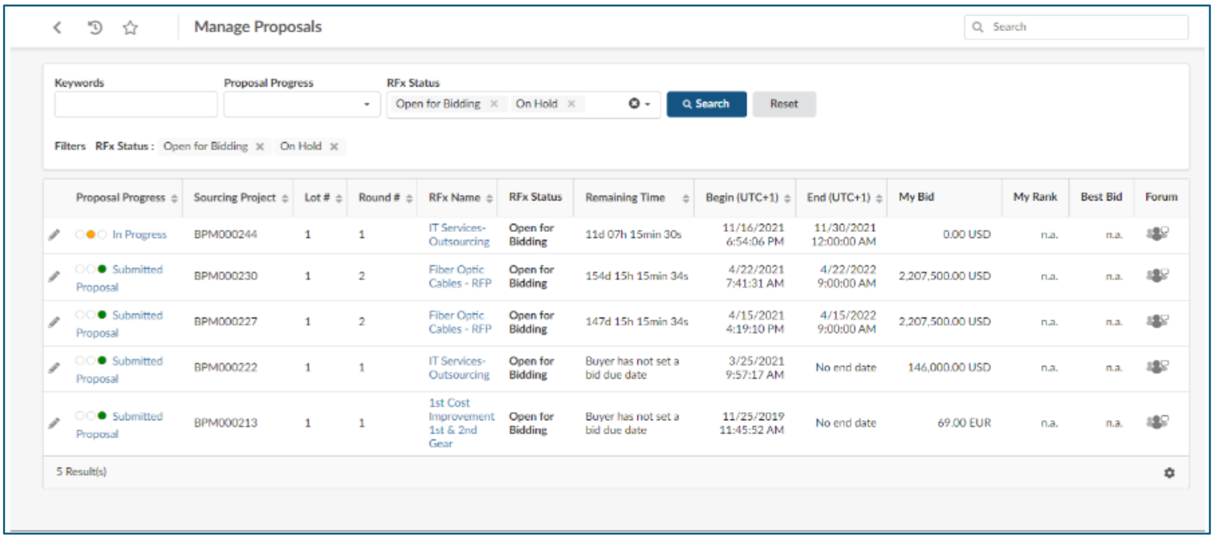
5. Click the Save button.

List of Sourcing RFx/Proposals

Accessing Sourcing RFx/Proposals

To access all the sourcing RFx you have been invited to participate in (Requests for Information/Quote/Proposal), go to Sourcing > Manage Proposals.

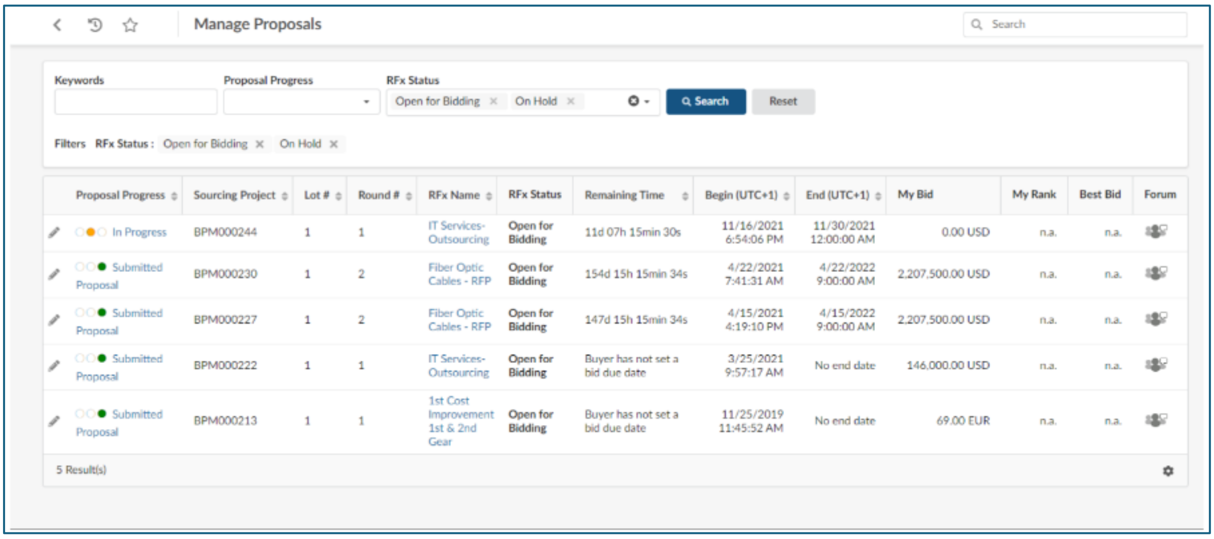
The Manage Proposals page is displayed.



By default, the list of sourcing events is filtered on events that are either Open for Bidding or On Hold.

Becoming familiar with the interface

The Manage Proposals page presents the list of sourcing events you are invited to participate in. These sourcing events can Requests for Information, Requests for Quote, or Requests for Proposal, which are collectively designated as "RFx").



By default, the list displays the sourcing events that are open for bidding (those for which you can submit a response) or on hold (events that the buyer in charge has temporarily paused to make changes). Use the Search Filters area to search for sourcing RFx/Proposals.

The list of Requests provides the following information:

Column	Description
	Opens the RFx round
Proposal Progress	Progress stage of your most recent response/proposal for the sourcing event
Sourcing Project	Sourcing Project code
Lot #	Lot number
Round #	Round number
RFx Name	Name of the sourcing event If the buyer has filled in a more detailed description, the icon ⓘ will appear next to the event name; hover over this icon to display the description.
RFx Status	Current status of the sourcing event: • `Open for bidding` : You can prepare and submit proposals • `On Hold` : You cannot open this event because the buyer in charge has temporarily paused it to make changes. A tooltip provides details. • `Closed` : The event has reached its end date/time and is no longer open for bidding.
Remaining Time	Time left before the bidding period closes
Begin / End	Begin and End dates of RFx specified by the buyer
My bid	Your last bid's amount
My rank	Your rank among the suppliers who were invited to bid
Best bid	Best bid among the bids of all the suppliers who were invited to bid
Forum	Direct access to the message board dedicated to the RFx

Searching for a Sourcing RFx/proposal

The upper part of the Manage Proposals page contains search filters that allow you to easily find a given RFx or a set of RFx that meet specific criteria.

1. Define your search criteria. You can filter the list on:
    - Keywords: Enter a string of characters to search.
    - Proposal Progress: Allows you to display only the sourcing events where your proposals are at the selected progress stages.
    - RFx Status: Allows you to display only the sourcing events that are in the selected statuses.
2. Click Search to apply the selected filters.

   The corresponding sourcing events and associated proposals are displayed.

   To restore the default filters, click Reset.