SUPPLIER RFX – USER MANUAL

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Chapter 1:   Introduction

An RFx is a sourcing event that enables buyers to determine the suppliers' capability to supply a product or a service, and the price at which they can supply it. The term RFx can refer to any of the following:

- Request for Information (RFI): An RFI is sent to new or current suppliers to confirm their ability or willingness to fulfil the organization's requirement.
- Request for Proposal (RFP): An RFP is sent to suppliers who are found capable of fulfilling the requirement. It asks for business proposals from the suppliers and may request for additional information regarding the product or service, or the processes followed by the supplier.
- Request for Quotation (RFQ): An RFQ invites qualifying suppliers to bid for the requirement and provide price quotes.

The Sourcing process consists of a series of steps that starts with creating an RFx and ends with finalizing the supplier who will supply the required product or service and closing the RFx.

A graphical representation of the process is provided below:
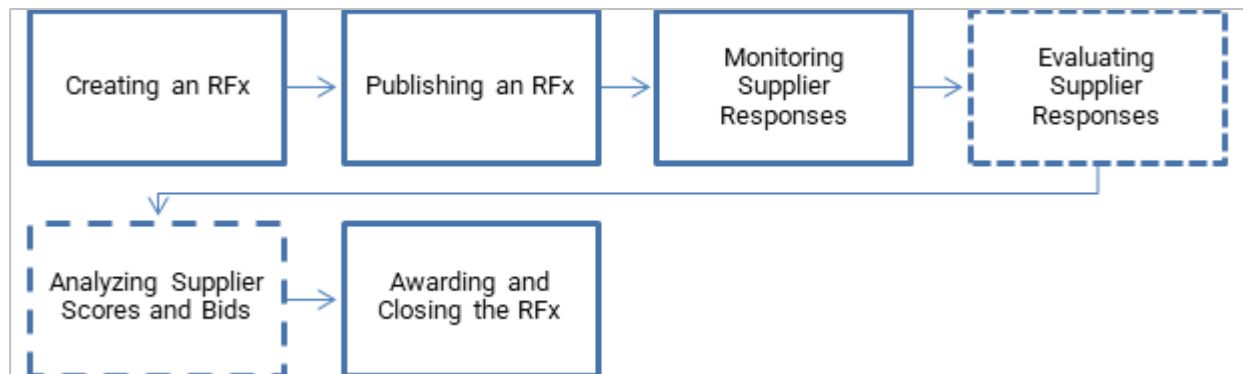
Chapter 2:   Overview

On successful login, the Workspace home page is displayed as shown below:
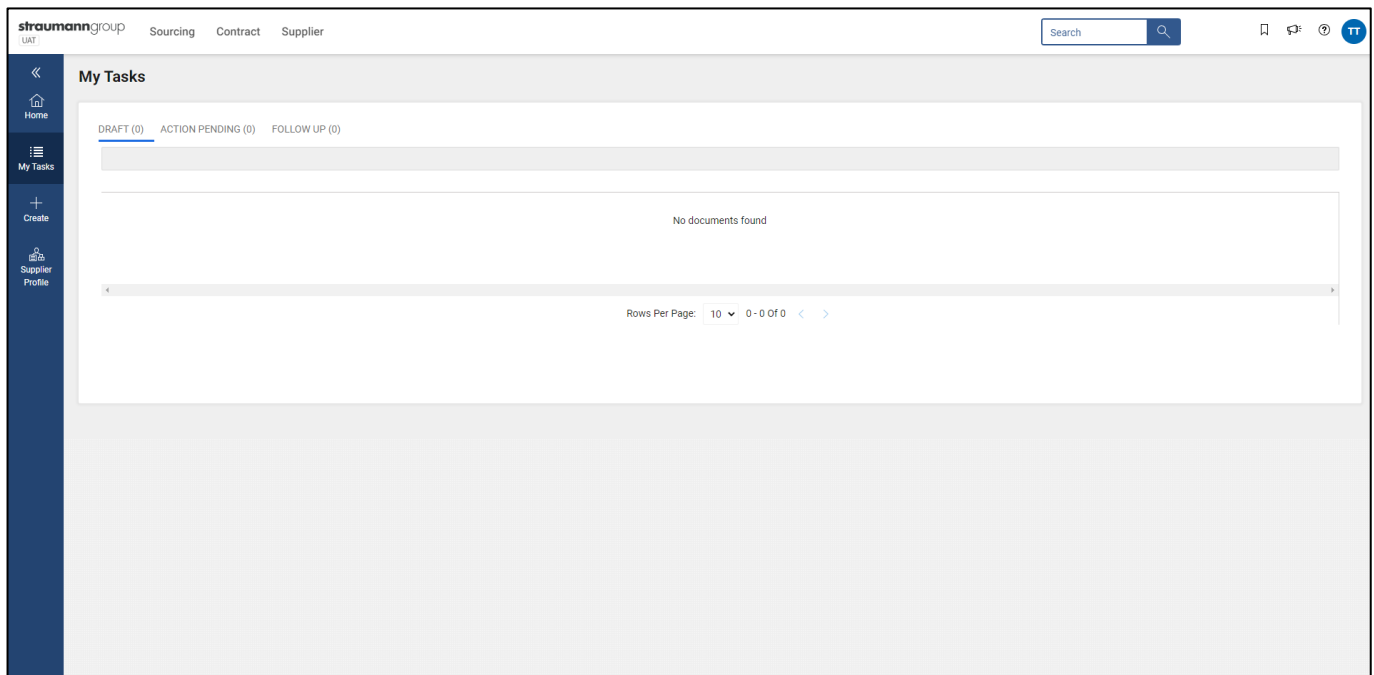
2.1   Manage Attributes

Supplier can choose to see the attributes of supplier choice upfront. Manage Attributes are nothing but the columns that supplier see upfront, under all the Sourcing tabs.

To access Manage Attributes:

■   Click **Manage Attributes** from top-right corner.
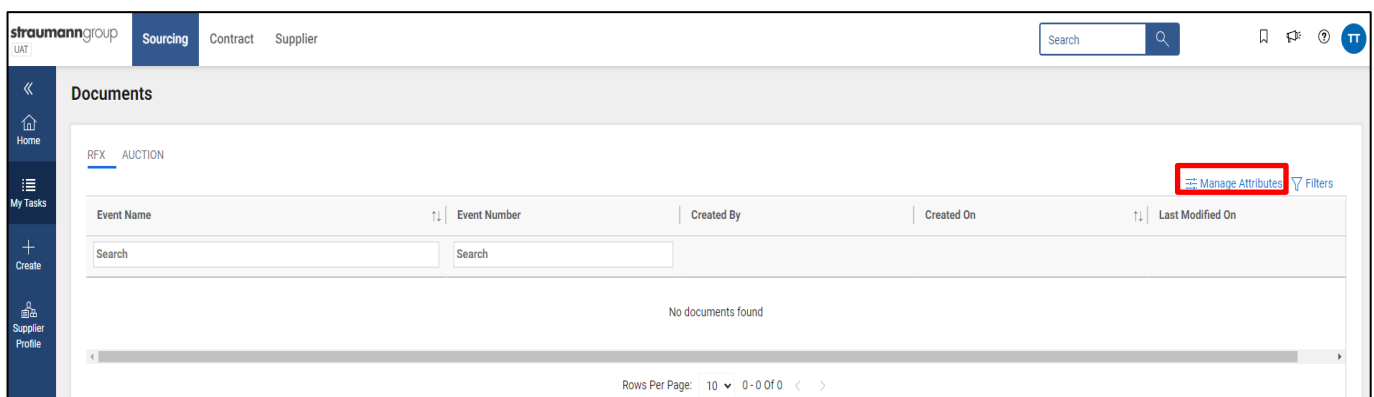
- The following **Manage Attributes** pop-up is displayed:
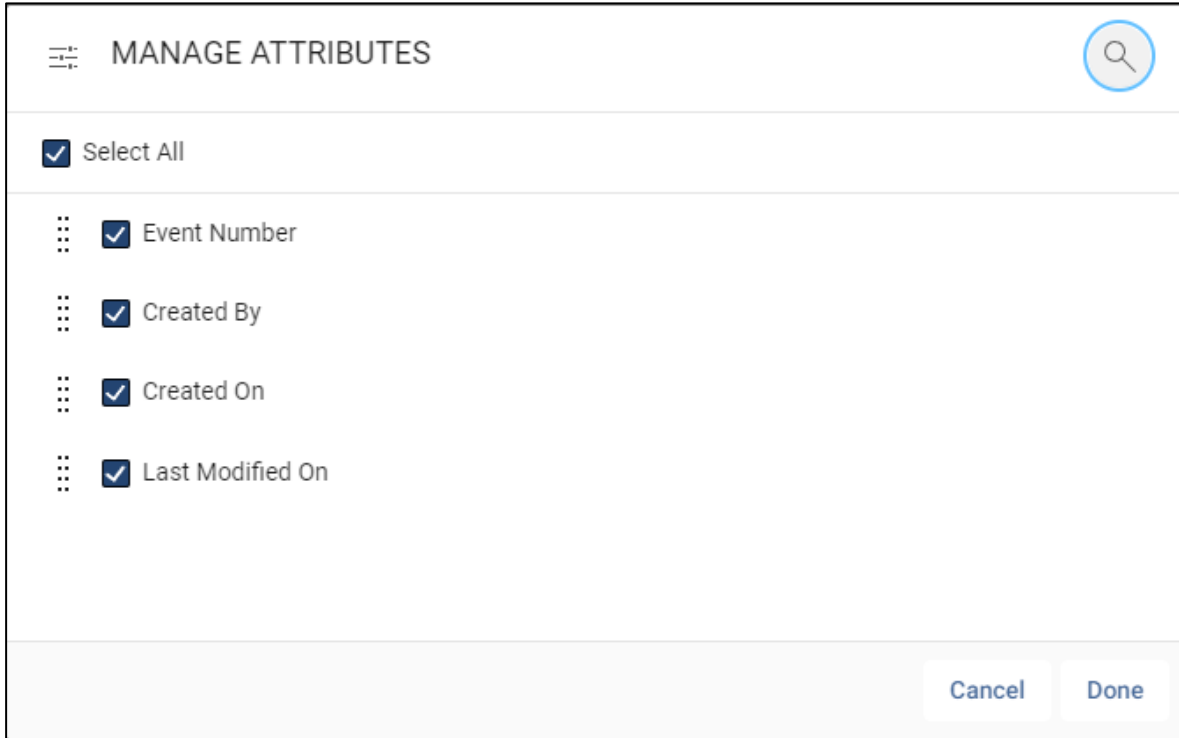
- Select or de-select the check boxes as per supplier business requirement.
- Click **Done**.

2.2   Filters

Supplier can use an object as the filter for the information displayed.

To access Filters:

- Click Filters from top-right corner.
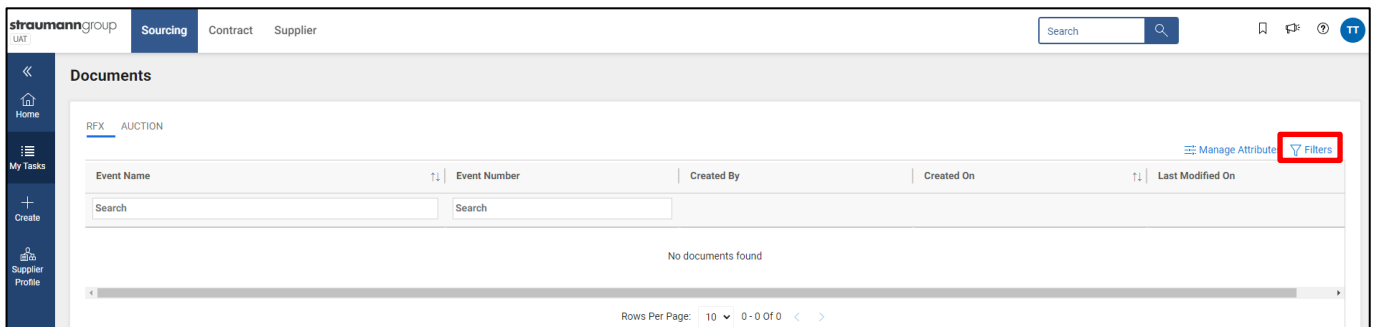
- The following Filters pop-up is displayed:

- The left pane displays the objects, and the right pane displays various types of filtering conditions based on the nature of the selected object.
- For example, in the above screen, we have selected Status, and on the right pane supplier can see different statuses.
- Select the appropriate status and click **Apply**.
- To save the filter, click this [icon] icon. To remove the filter, click [icon] icon.

Chapter 3:   Viewing the RFx event

Once the buyer organization has published a sourcing RFx event and invited supplier to it, an invitation mail is sent to supplier. Supplier can access the sourcing event by using the link provided in the email, as shown:

Hi Test Trainer,

You have been invited to participate in a sourcing event.

Here are the details:
Client Name: Straumann

Event Name:Test RFx

Event start date/time: 10/6/2022 12:00:00 AM Eastern Standard Time
Event end date/time: 10/13/2022 11:59:00 PM Eastern Standard Time

You can use the following link to access the sourcing event:https://smartuateu.gep.com/Sourcing/rfx?dd=ZGM9MTI0MyZicGM9NzAwMjlxNjU1&b=0&oloc=219&c=NzAwMjlxNjU1#/rfx/new

Basic Instruction:
  1. If you do not have a GEP SMART account, click here to create a new account and register yourself with Straumann.
  2. After you create the password, you can log into GEP SMART and select the event to participate.
  3. Note that the time zone of the event is Eastern Standard Time. You may be in a different time zone, and therefore, make sure you log on at the right time to avoid missing the event.

Thank you,

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Alternatively, supplier can access a Sourcing RFx event from the Task or Manage section of the Workspace.

Following are the different statuses an RFx can have:

Status		Description	
1)	New	2)	The event is yet to be accepted.
3)	Guidelines Acknowledged	4)	Supplier have accepted the Guidelines.
5)	Participation confirmed	6)	Supplier have accepted the invitation to participate in the event.
7)	Response Submitted	8)	Supplier have submitted supplier responses for the event.
9)	Event Closed	10)	Response timeline has ended and if user have not submitted responses or taken any action from the menu.

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3.1　　Guideline Acknowledgement

Once supplier follows the link provided in the email notification or after supplier clicks to open the event from the Workspace home page, the RFx page is displayed. Based on the configuration selected by the buyer, initially supplier can only see Guideline with an acknowledgement section. It is only after supplier accepts the Guideline, that supplier can access the rest of the RFx event.
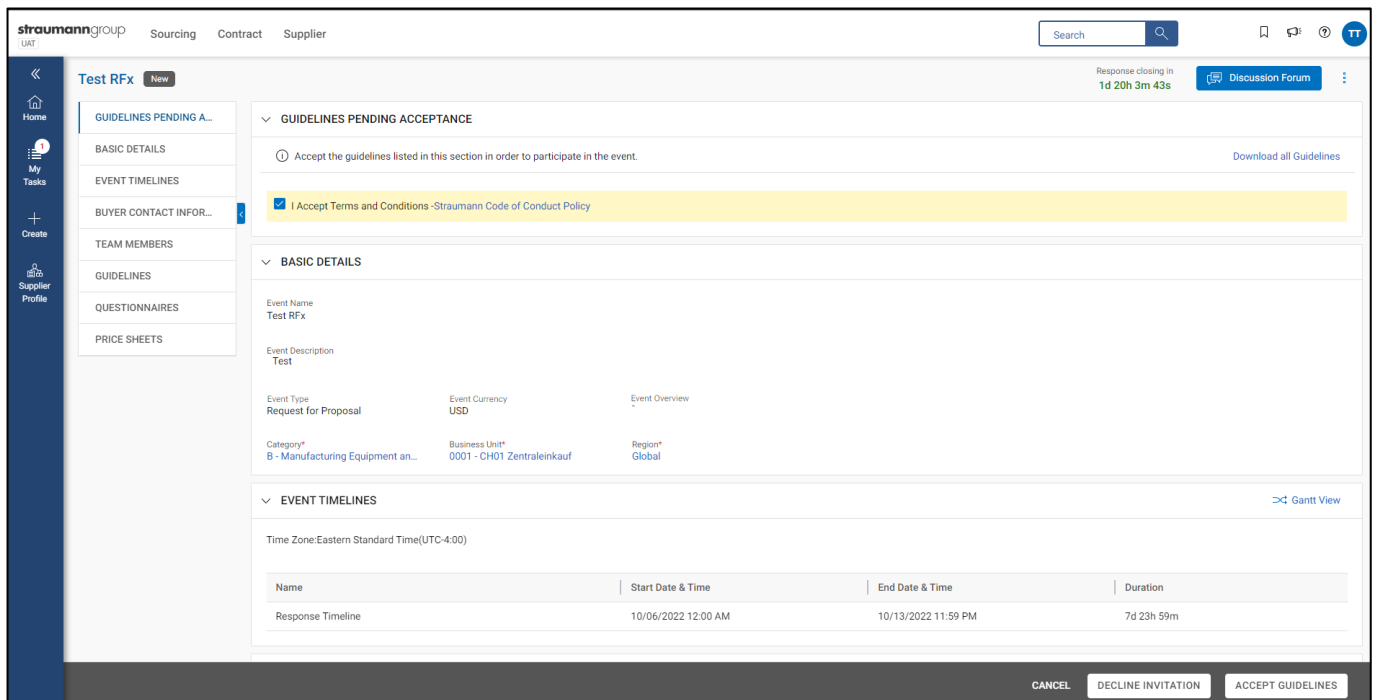
If supplier does not want to participate in the RFx event, supplier can decline invitation.

To decline invitation:

- Click Decline invitation.
- Click **Yes** on the following confirmation pop-up.
   - The following Decline Event popup is displayed:

- Select an appropriate reason from the drop-down. Supplier can mention supplier comments in the respective comments field.

  - ♦ Click the ⬚ icon to upload any attachments.
  - ♦ Click **Done**.
  - ♦ Click **Ok** on the following success pop-up.

3.2   Decline Invitation Option Visible Upfront

Supplier users can view the Decline Invitation option upfront, until they confirm participation for the event, as shown below:
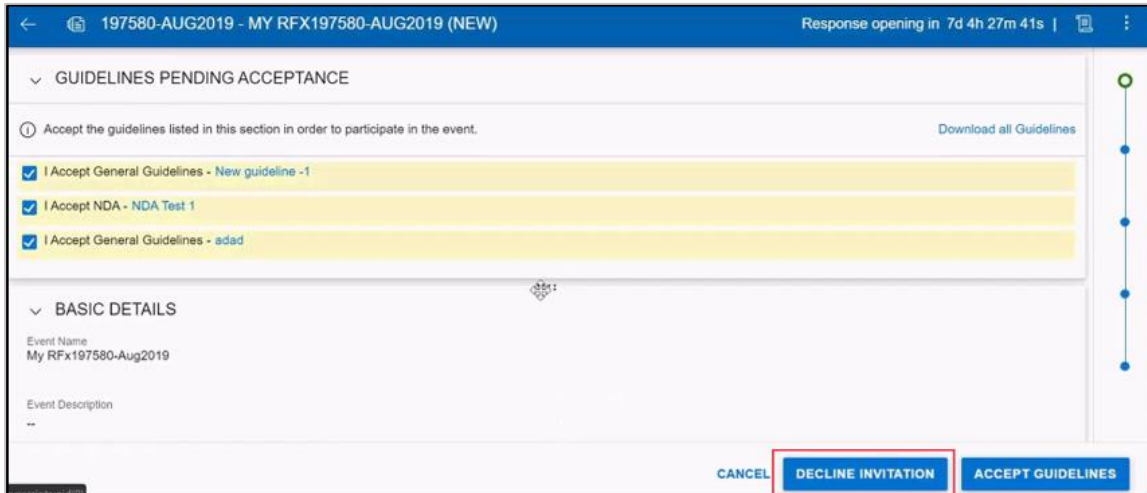
3.3   Viewing an RFx

Whenever there is a new invitation for an event from the buyer, that new event is displayed in **My Tasks** section of Workspace with status New.

The Event disappears from **My Tasks** section as soon as supplier submit the responses; event completes or decline participation.

On the RFx page, the timer section, on the upper right corner, depicts detailed information about event opening or closing, in days and time. On first access, an RFx page displayed is as shown below:

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> *On first access to the RFx page, supplier can see the Guidelines Acceptance section in the top. Only this section is active initially and suppliers are required to read the guideline and other documents and accept it to gain access to the remaining sections in the RFx event.*

Note

3.3.1 Withdraw RFx without Notification

Buyers can withdraw an RFx without notifying Suppliers, to make minor changes to the content of the RFx. This RFx can be republished, again, without notifying Suppliers.

3.3.2 Notify participants about Event Completion

The Mark as Complete action in an RFx allows the Buyer to conclude the sourcing event for all participants, including Suppliers. This helps to convey the message to event participants that no further action is needed from them in the event.

3.3.3 Cancel an Event

User can cancel an active sourcing event after it has been published using the Cancel Event functionality. User can specify reasons for event cancelation, which are communicated to all participants in the event by email.

3.3.4 Enhancements to RFx Basic Report

The RFx basic report has the following additional attributes:

- Supplier's participation and awarding information:
  - Supplier Awarded By
  - Suppliers Awarded (Count)
  - Suppliers Participated (Count)
  - Supplier Participation Status
  - Supplier Awarded Date
- Linked document Details:
  - Contract Flip By
  - Contract Flip Date
  - Contract Number
  - Requisition Number
  - Project Number
- Event property updates:
  - Training Event
  - Public Event
  - Sealed Event
  - Diversity Exclusion Comments
  - Event Value in Domain Currency

3.3.5 Ability to Download an Enhanced RFx Summary

User can download an enhanced summary of the RFx event. The Download Summary action in the RFx will provide supplier a consolidated file (zip file) containing a summary of the event, guidelines, price sheets, and questionnaires. This download will be available on both, buyer, and supplier side.

3.3.6 RFx − Upload/Download Log Enhancement

User can view a log of all the download and upload activities done in the various sections of the RFx event. Thus, at the event level and in each Questionnaire, Price Sheet section, supplier will now see a new option - Upload and Download Log.

This enhancement provides the following advantages:

1) View the record of all the downloads and uploads from a centralized location

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Note

This will be user specific, that is, each user views their own record.

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2) Access a readily downloadable file from the log.

3) View the error messages for import failures and take relevant action.

Note

The log will not show the records of exports done from Response Workbench, individual price sheet, or questionnaire response export.

Chapter 4: Responding to an RFx

An RFx page has the following sections:

- [Guidelines Pending Acceptance](#)
- [Basic Details](#)
- [Event Timelines](#)
- [Questionnaire](#)
- [Contract Terms](#)
- [Price sheet](#)
- [Attachments](#)
- [Team members](#)

4.1 Accepting the Guidelines

Based on the configuration selected by the buyer, initially supplier can only see an Acceptance section. It is only once supplier accept the Guideline, that supplier can access the rest of the RFx event.

To accept the Guideline,

1) Click the **Guideline** name to read through the Guideline/NDA and then accept the Guideline. Select the **I Accept Guideline** checkbox.

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2) Once supplier accept the NDA/Guideline, the status of the event changes to **Guidelines Acknowledged.**

3) Then, click the **My organization wishes to participate in this event** checkbox at the bottom and then, click the **Confirm participation** button at the bottom right corner.

4) Click **Ok** on the subsequent success pop-up.

5) Once supplier submit the acceptance, the status of the event changes to **Participation confirmed** and the rest of the sections become active.

4.2 Basic details

The Basic Details section displays the basic information regarding the RFx event such as the event name, description, type, currency, category, business unit and region.

- ■ At the top-right corner, you can see the timer that indicates the time for the event to open and the closure time of response.

4.3 Event Timelines

The Event Timelines section displays the response timeline set by the buyer. The Response timeline is the time frame within which supplier can respond to the buyer.

Following screenshot displays the Event Timelines section in the 12-hour format:

4.3.1 Ability to Extend Response Timelines for Selected Suppliers

The buyer has the ability to select suppliers to whom an event extension notification will be triggered. On extending the response timeline in response closed status, the buyer will get the option to choose suppliers and customize the email template. Only selected suppliers will receive the timeline extension notification, but the response timeline would be extended for all supplier's part of that event.

4.4 Guidelines

The Guidelines section includes the guidelines provided by the buyer that supplier need to follow while responding to an RFx.

Click the **Guideline name** to view the details of the guidelines.

4.5 Team Members

The Team Members section displays the team members that supplier has added. It enables supplier to respond to invited RFx event by collaborating with supplier team members.

 Team members can be assigned below roles for any RFx event:

- **Primary Respondent**: The primary point of contact from Supplier Organization, ideally means the entire RFx response will be driven by this person. There can be only one Primary Respondent.
- **Collaborator:** Team member having rights equivalent to Primary Respondent. There can be multiple collaborators involved in an RFx event
- **Viewer:** Team member having only view access to event

Note — *The above roles can be assigned or modified by the Event Author, Event Co-Author or by the Event Admin from the Buyer Organization or by existing primary Respondent or Collaborator from the Supplier Organization.*

- To configure team members:
  - Click the **Manage Contacts** icon under the Team Members section.

Manage Contacts - TestTrainer10		🔍 Search	⊕ Add New Contact
Name & Contact ⇅	**User's Role**	**Updated By**	**Email Sent On**
Test Trainer testtrainerkpmg10@gmail.com | 09877898	Primary Responder ▼	Buyer	10/12/2022 4:23 AM ✉

CANCEL   DONE

- Select the desired role from the user role drop-down list and click **Done**.

Manage Contacts - TestTrainer10		🔍 Search	⊕ Add New Contact
Name & Contact ⇅	**User's Role**	**Updated By**	**Email Sent On**
Test Trainer testtrainerkpmg10@gmail.com | 09877898	Primary Responder ▼	Buyer	10/12/2022 4:23 AM ✉
	Primary Responder		
	Collaborator		
	Viewer		
	No Access		

CANCEL   DONE

Questionnaire Name	Modified by	Last Modified On	Questions	Response Completion %
Test Questionnaire 1		-	1	

Supplier can then view the added team members with the assigned roles in the team members' section.

4.5.1 Team Member Configuration Activities in Audit Log

Team Member configuration related activities can be captured in Audit Log. The activities can be "Adding", "Deleting", and "Changing" Configuration of a Team Member in a RFx event.

Team members are added. Select any one of the team members and perform some actions. Audit Log captures the actions performed and displays the results as shown below.

User can view the actions performed (added, deleted, and configurations modified) to team members as shown below.

4.6 Questionnaire

The Questionnaire section enables supplier to answer questions added by the buyer. Supplier response to the questions may determine supplier score when the RFx is evaluated.
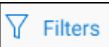
To respond to the questions, under the **Questionnaire** section, click on the Questionnaire Name. The following Questionnaire page is displayed:

User can respond to any questions added by the buyer, in the space provided for each respective question.

The completion indicator on the bottom left corner of the page indicates the completion status of supplier response in percentage.

- Click the [🔽 Filters] icon to apply filters on the list of questions.

Select the desired option(s) from the list and click **Apply**. Depending upon the type of questions configured by the buyer, the response type will vary.

4.6.1   Export Responses in Single or Multiple Sheets

When exporting Supplier responses to questionnaires or price sheets from the Response Workbench, users can now choose whether they want all questionnaire responses or price sheet responses consolidated in a single worksheet or presented in multiple worksheets, with one worksheet per questionnaire or price sheet.

▪ The following screenshot displays the option to export the responses in a single or multiple tab:
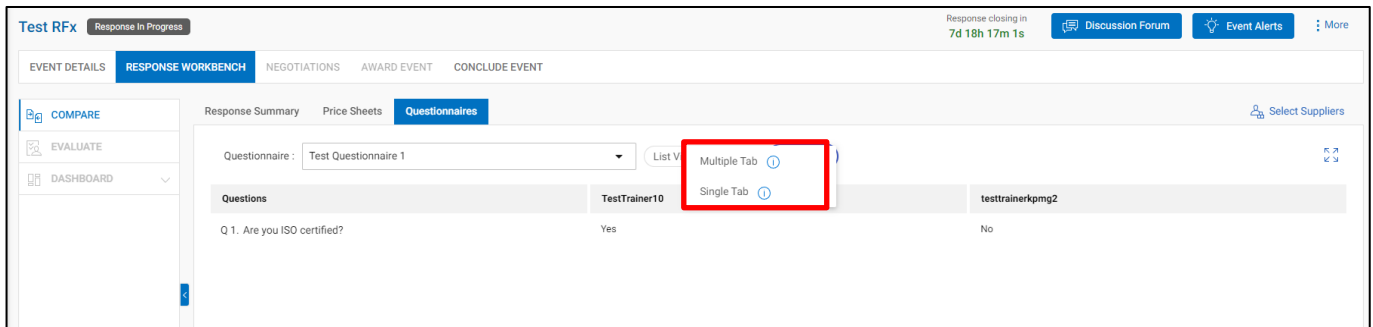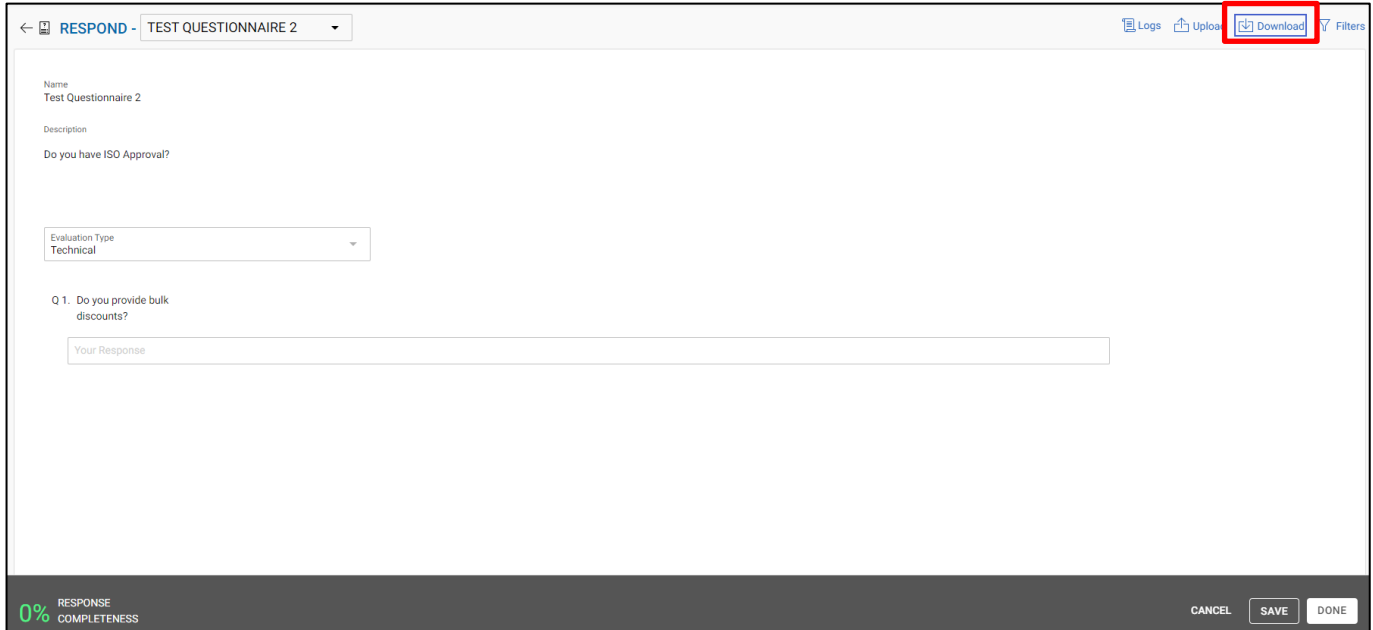

4.6.2   Responding to a Questionnaire Offline

To download a questionnaire:

▪ From the Questionnaire section, open the desired questionnaire in edit mode.

▪ Click [Download] icon on the top-right corner of the questionnaire.
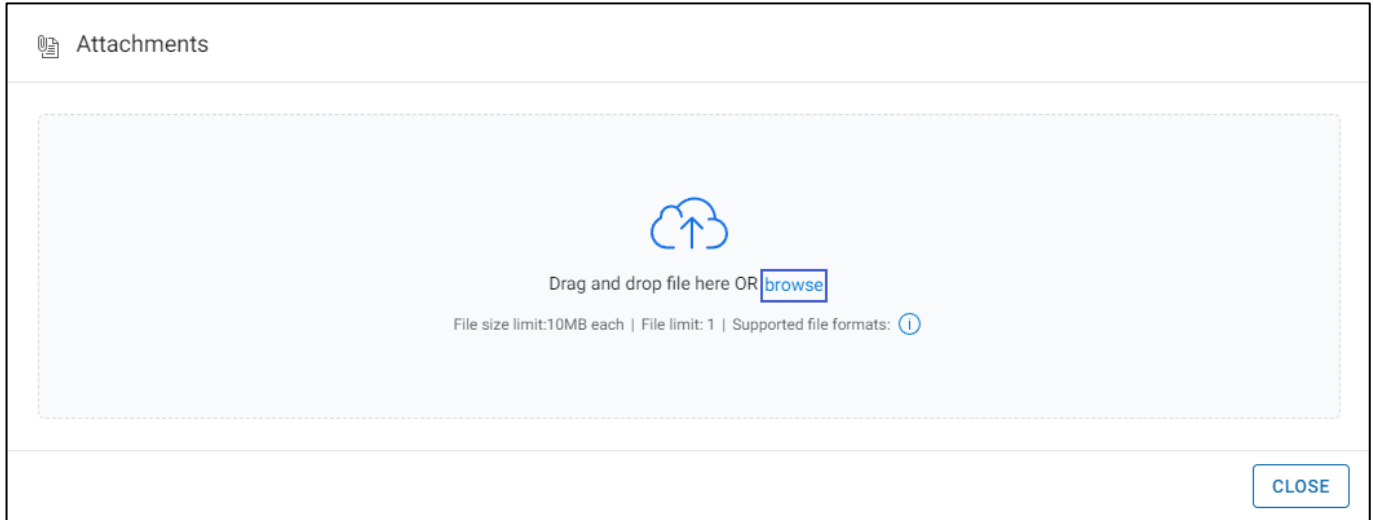
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- The questionnaire is downloaded in the form of MS Excel.
  - Supplier can then go ahead and respond to the questions in the MS Excel itself.

4.6.3   Uploading the Questionnaire Response

- Once supplier have responded to the Questionnaire in the MS Excel, click the ⬆ Upload icon on the top-right corner.

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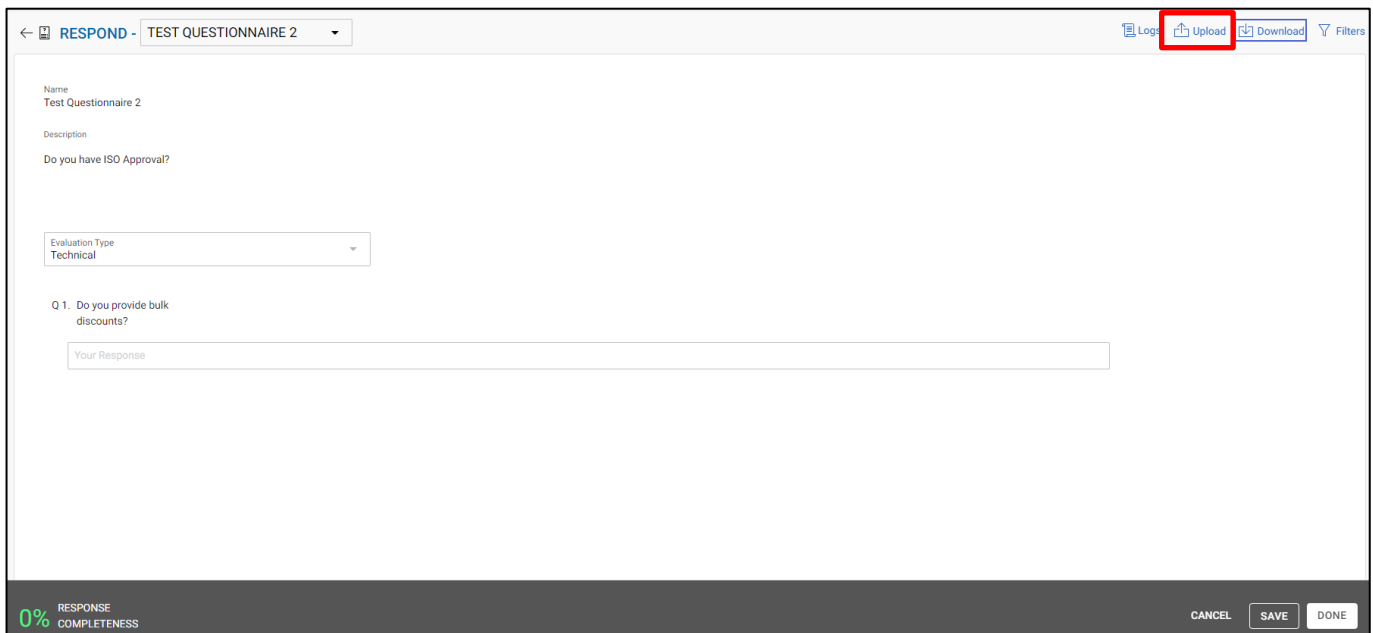
- Drag and drop or upload the MS Excel file on the subsequent pop-up and click **Close**.
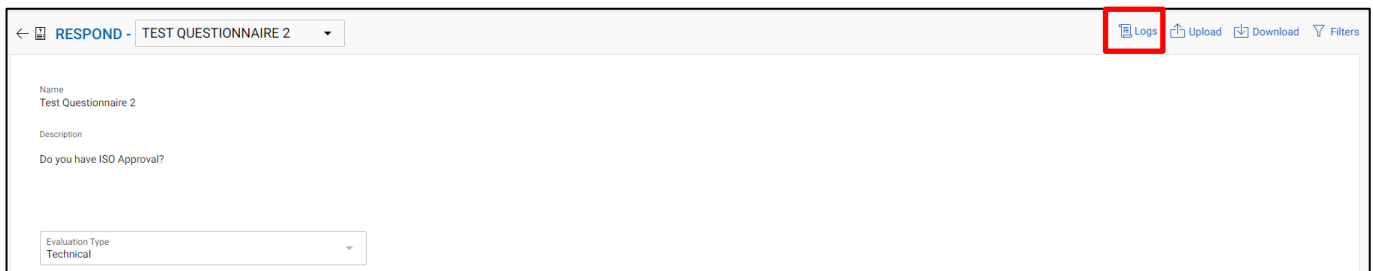

- Supplier can view the uploaded file in the Upload/Download Log. Also, the response is updated on the UI.

Note

Supplier need to refresh the page once, to view the response on the UI .

- Click the ⬚ **Logs** icon to view the list of uploaded or downloaded Questionnaires.

- The Upload/Download Log page is displayed as below:

The log displays the file requested for, File status, File requested on, File created on, the document name and error log if any. Similarly, supplier can go ahead and respond offline to other questionnaires as well.

4.6.4   Supplier Response Completion Status

User can track each supplier's progress in the sourcing event through the Response Completion Status column.

A supplier's progress is measured in terms of the responses they have entered in the questionnaires and price sheets in the event. This information is presented in a single statistic available in the Suppliers section of an RFx, as shown below:

4.7   Price Sheets

A price sheet includes a list of items specified by the buyer. As supplier, an user can provide a quotation for the required items. To view the price sheets, under the **Price Sheets** section, click the Price sheet name.

The columns and rows in the price sheet are non-editable. By default, the **Intent to Bid** field for each line item is set to Yes. This means supplier want to bid for the line item. Fill in supplier quotation/details in the Price per unit column.

In case supplier do not want to bid for the item, select **No** from the dropdown under the Intent to Bid column.

4.7.1   Work With Price Sheets Offline

Supplier users are able to work with Price Sheets offline and upload them back to SMART by GEP. The users can download all the Price Sheets, edit them, and based on the editing access, they will be able to upload the information back to SMART by GEP.

4.7.2 Switch Between List View and Grid View on Price Sheets

When working on price sheets, supplier have the capability to switch the view type between a list view and grid view. The application now also enables supplier to select the view mode for downloading price sheet response comparison with the below additional options:

- List View – Supplier response comparison one below another
- Grid View – Supplier response comparison side by side

The above mode can be combined with the existing Single Tab and Multi Tab Export. For example, supplier can select to Export Grid View in Multi Tab mode.

4.7.3 Response Submission

To submit the response click **Submit Response** button.

4.8 Actions on the price sheet

4.8.1 Actions

Supplier can perform the following actions on the price sheet that are available on the top-right corner of the Price sheet:

In auction events, user can now set the Ranking/Bidding variable for Regular (English) Auction.

Action	Description
Freeze/Unfreeze	Freeze/Unfreeze rows/columns.
Show/Hide columns	Filter the required data.

4.8.2 Downloading a Price Sheet

Supplier can download a Price sheet in the MS Excel format.

To download a Price sheet:

1) In the Price sheet section, open the required Price sheet in Edit mode.

2) Click the icon on the top-right corner of the Price sheet.

3) An MS Excel version of the price sheet is downloaded.

4) Supplier can then go ahead and respond to the line items in the MS Excel.

> ■ *Suppliers need to first create a Price Sheet on the UI. Supplier cannot add, edit, or delete columns in the downloaded MS Excel Price Sheet.*
>
> **Note**

4.8.3   Uploading a Price Sheet

■ Once supplier have responded to the Price Sheets in the MS Excel, click the ⬚ **Upload** icon on the top-right corner of the Price Sheet to upload supplier r response.

Supplier can view the uploaded file in the Upload/Download Log.

- Click the [Logs] icon to view the list of uploaded or downloaded Price Sheets.

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- The uploaded and downloaded files are displayed on the subsequent upload/download log page as shown below:

The response is also updated on the UI.

Note

Supplier need to refresh the page once, to view the response on the UI .

The log displays the file requested for, File status, File requested on, File created on, the document name and error log if any.

4.8.4   Price Sheet Column Width Persistence

The column width for price sheets will now remain persistent at all places where the grid is available. The persistence will be at the user level, which means the width for User A and User B will be independent. The default column width at the supplier side will be determined by the column width set by the Author at the time of invitation (In case of public events when the supplier accepts participation).

Following screenshot shows standard column width in price sheets:

Now, the following screenshot depicts a reduced column width (independent according to a user), which persists:

4.9   Attachments

The Attachments section displays all the attachments and support documents added by the buyer. The attachments added by the buyer are displayed under the Buyer tab. Supplier can also add supplier's own attachments. The attachments added by supplier are displayed under the Suppler tab.

■   In the Supplier Attachments section, click **browser** to upload attachments.
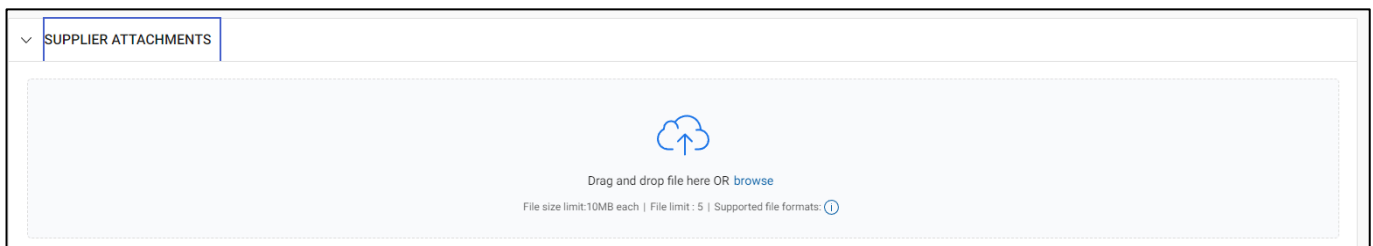
4.9.1   Introduction of Attachment Classification

Attachment Classification at buyer side of RFx. When a supplier adds an attachment, the Attachment Classification is blank, with the option to specify the required classification, as shown below:
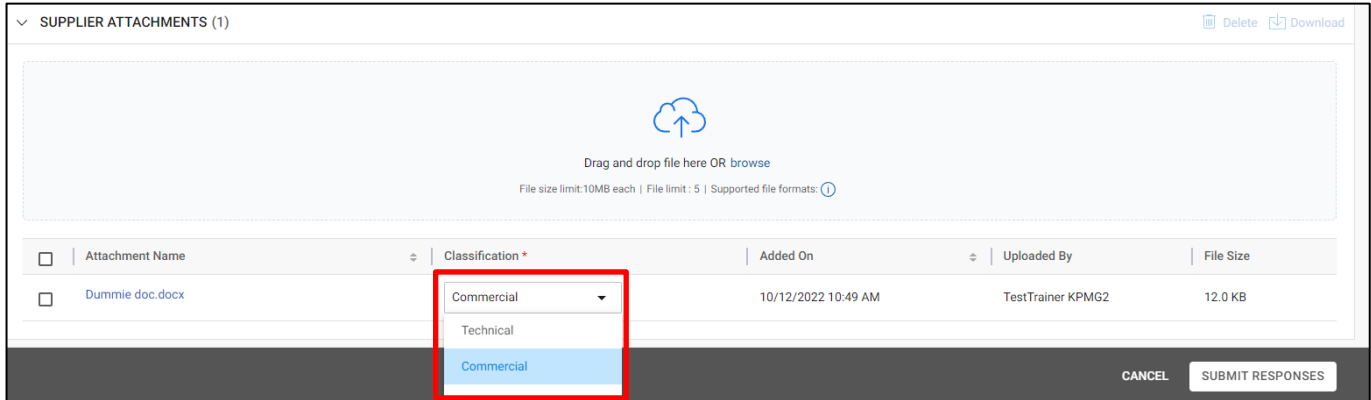
4.9.2   Supplier Attachment File Name Includes Supplier Legal Company Name

When supplier downloads supplier attachments from the Attachments section, the application creates a zip file and downloads it for supplier. The application will also append the supplier's legal company name in the name of the zip file for easy identification.

4.9.3   Cancelling of Specific Forms on RFx for Suppliers which are not Shortlisted

When RFx document is of Status RFx Awarded or Contract Executed (which ever happens first) with selected supplier, it should Cancel Forms for remaining Suppliers in "Launched" or "Response in Process" state by the system.

Chapter 5: Group Discussion

Using the group discussion forum, supplier can view and take part in various discussion topics that are created by the buyer, as well as create supplier own topics.

Note *Any topics that supplier create are visible only to the buyer.*

The group discussion forum becomes active, only after the event is published and supplier has confirmed participation. To open the discussion forum, click the **Discussion Forum** icon, displayed next to the event timer.

Supplier can view and respond to the discussions that the buyer may have initiated in the discussion forum. Supplier can start a discussion once the event is published.

To initiate a discussion: in the RFx event:

1) On the top-right corner, click **Discussion Forum**.

Note *Only those team members who are invited to participate in the RFx event can view the icon.*

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2) The group discussion topic is displayed. By default, the first topic, which is created by the application, has the same name as the RFx event.
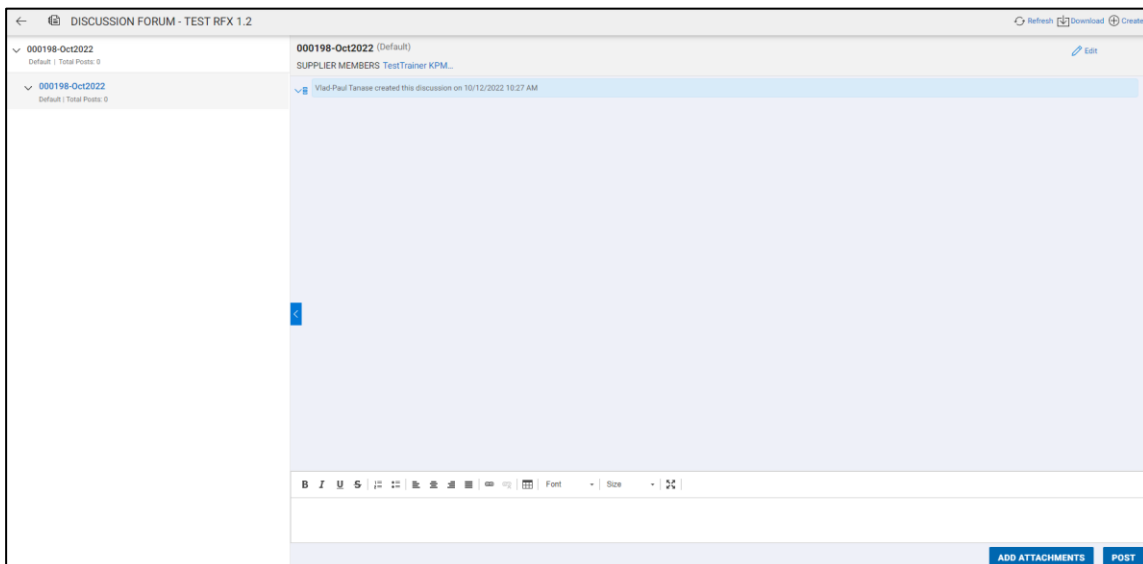
3) Select the required participants and click Save.

4) To create a topic, click the Create Topic/ Discussion ⊕ Create icon.
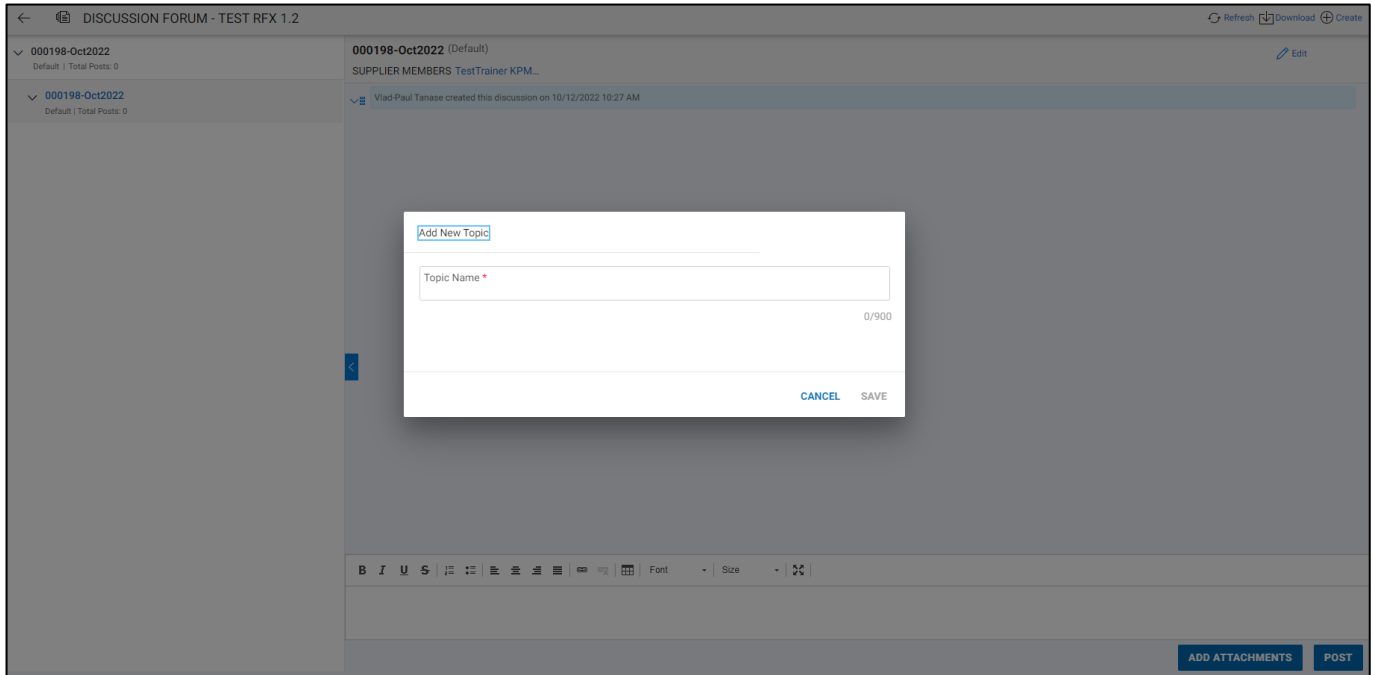
5) Enter the topic name and click **Save.**

6) Similarly, to create a discussion, click the **Create Topic/ Discussion** ⊕ Create icon.
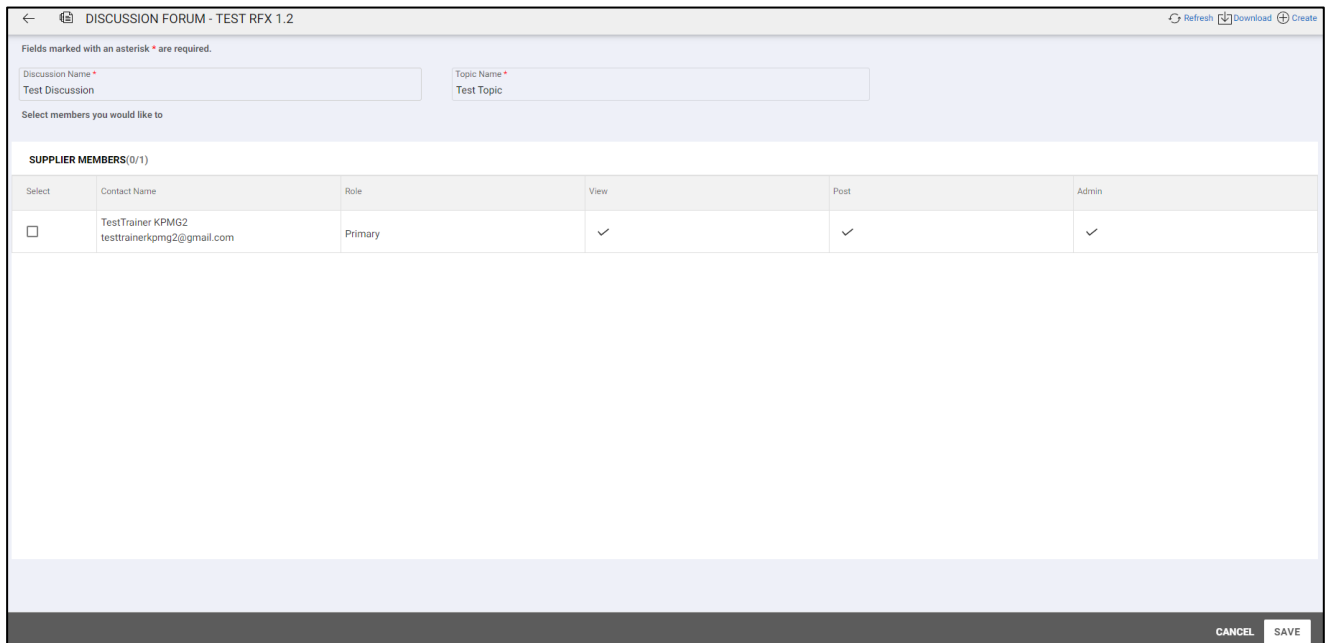
7) Type the discussion name and select the topic to associate with the discussion.

8) Select the team members and suppliers who can access the topic.

9) Click Save.
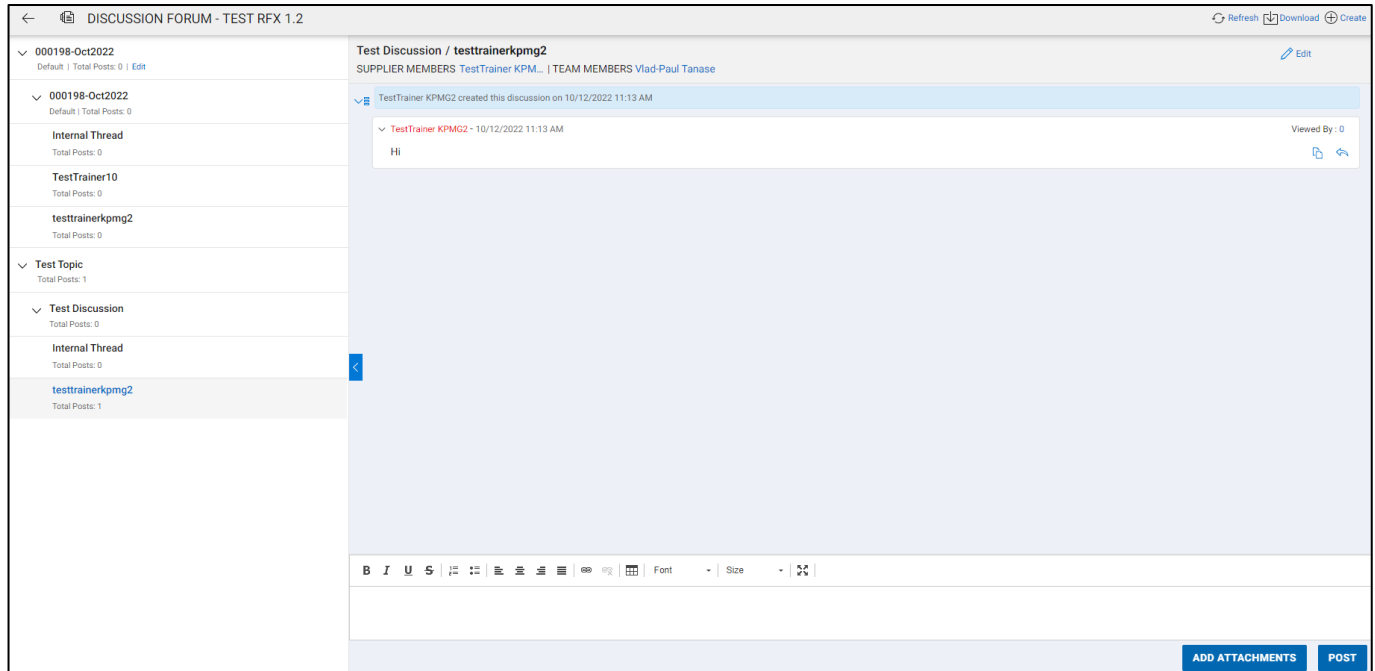
10) Click **Add Attachments** [icon] icon to attach documents, if any.

11) To post supplier messages or replies in the discussion, in the left pane of the page, click the discussion title.
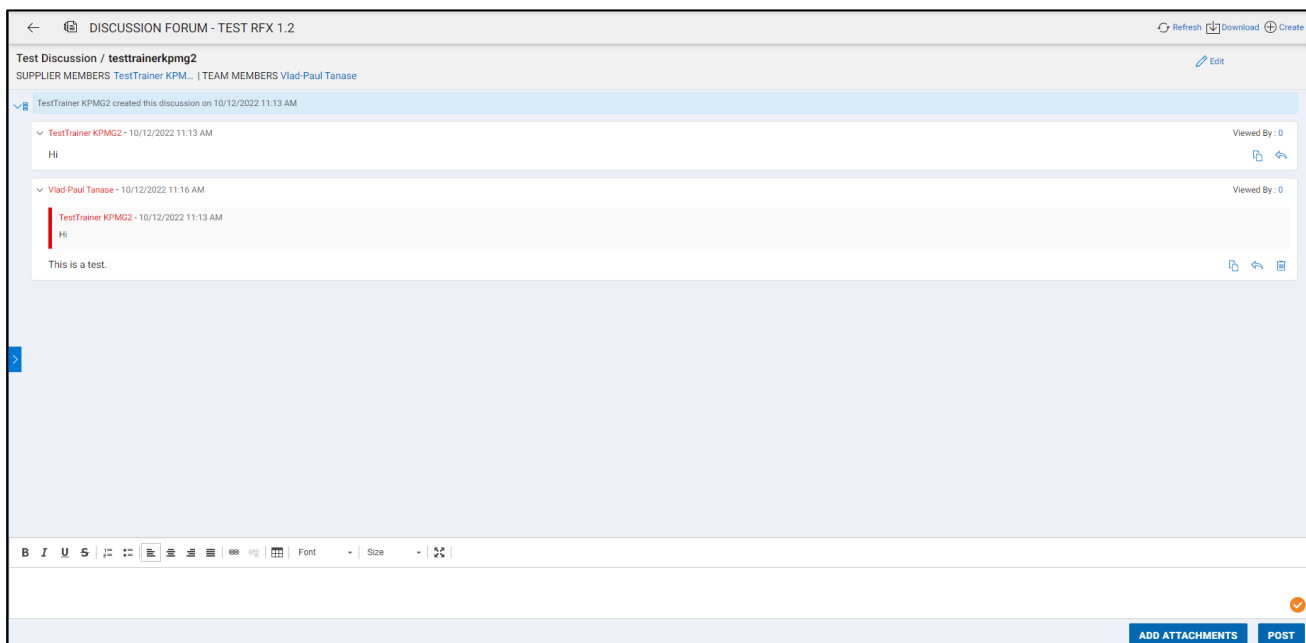
When a supplier replies to a buyer's message, only the buyer and his or her team members can view the reply. Other suppliers cannot view it.

In a group discussion, supplier can also take the following actions.

Field	Description
✏ Edit	Edit the name of the discussion.
↻ Refresh	Refresh the page.
↓ Download	Download the group discussion.

5.1.1 Retaining of Old Author Data Post Ownership Change

After a change of RFx ownership, the Discussion Forum will now retain the old Author's name in the comments posted by the old Author. This is also applicable in scenarios where the Supplier's Primary Respondent for an RFx changes from one person to another.

5.1.2 View Date and Time for Comments According to Time Zone

User can view date and time in supplier's respective time zone. For example, if user is in the Eastern Standard Time zone, supplier will see date and time converted in Eastern Standard Time. This enhancement is applicable for both buyer and supplier users.

Chapter 6: Performing Actions

In this section, supplier will learn about the different actions that supplier can perform to an existing RFx.

6.1 Accepting Event Participation

Even though supplier have declined to participate in an RFx event, supplier still have a chance to participate again until the response timeline is open.

1) Click the Actions ⋮ icon on the top-right corner of the RFx event and then click **Accept Invitation**.
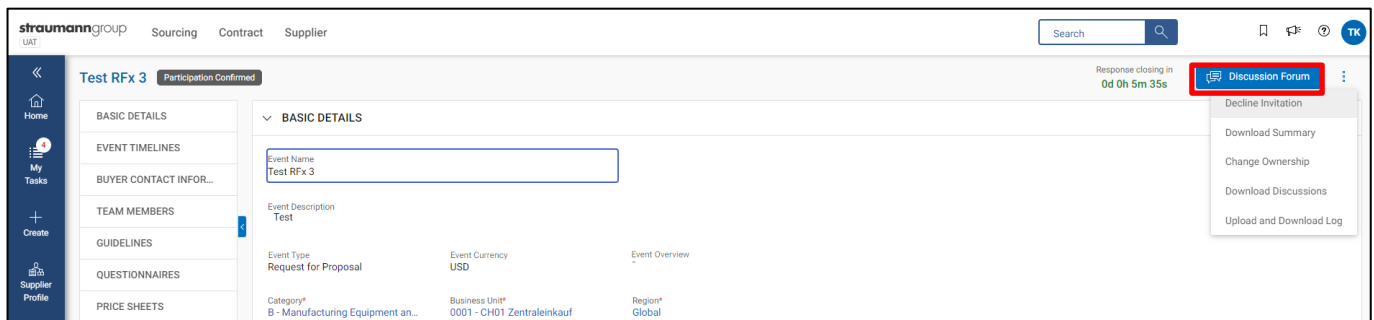
2) Click **Yes** on the following confirmation pop-up.
3) Click **Ok** on the Success pop-up.

6.1.1 Viewing Upload/Download Logs

Supplier can view logs of all the uploaded/downloaded files. All the files that supplier upload/download from the Questionnaires or Price sheet section, for the RFx event are displayed, thus saving supplier's time to navigate to various section to fetch the file.

View the log:

1) Click the ⋮ icon and then click **Upload and Download Log** icon on the upper-right corner of the RFx event page.
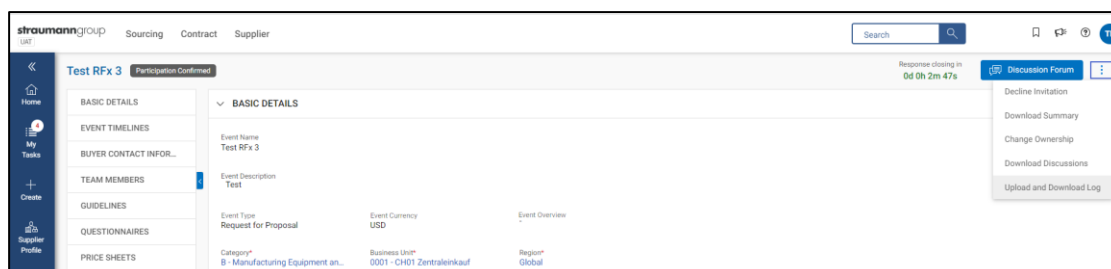
2) The following Download Log page is displayed:

	Action	File Status	File Requested On ⇕	File Created On ⇕	Document Name	Error Log
⬇	Questionnaire Download (Multiple)	Complete	10/12/2022 7:27 AM	10/12/2022 7:27 AM	000199-Oct2022.zip	-

← 🗎 **Upload and Download Log(1)**   ▽ Filter
ⓘ Eastern Standard Time (UTC-4:00)
ⓘ File(s) contains sensitive information. Please ensure they are downloaded in a secured system.

6.1.2   Downloading Event Summary

The Download Summary option under the Actions menu helps supplier download a consolidated zip file containing the summary of the event, guidelines, price sheets, and questionnaires.

To download the event summary:

1) Click the **Actions** ⋮ icon on the top-right corner of the event page and then click **Download Summary** from the options.

The event then gets downloaded in the zip file that contains the guidelines, price sheets, questionnaires, and the event summary.

Chapter 7:   Submitting a Response

After viewing all the required details on the RFx and responding to the questionnaires and price sheets, as applicable, supplier can submit supplier's responses to the buyer.

Click the **Submit** button on the bottom right corner of the RFx page to submit supplier's response.

- Click **Yes** on the confirmation pop-up.
- Once the response is submitted, the status of event changes to Response Submitted.

7.1.1   Ability to Specify Bidding Rules for Suppliers

The buyer user can specify the bidding rule for each of the custom columns that they have set up for suppliers bidding. For example, user can set up discounts and prompt suppliers to increase the discount in each bidding interval:

1) **Decremental Bidding** - Supplier must place bid less than or equal to previous bid for that selected column.

2) **Incremental Bidding** - Supplier must place bid higher than or equal to previous bid for that selected column.

3) **Not Applicable** - No restrictions on bids placed by suppliers for that selected column.

7.1.2 Support for Supplier Revision of Bids during Feedback Period

Buyer organization along with providing feedback can enable the suppliers to provide revisions to their initial submitted price. Following are the key points regarding this capability on the buyer side:

- Allow suppliers to provide revised response during feedback timeline.
- For all the columns on which feedback is enabled, suppliers will be able to provide revisions.
- Buyer can enable restrictions on supplier's price revision, that is, restrict suppliers from placing a bid higher or lower than last submitted bid.

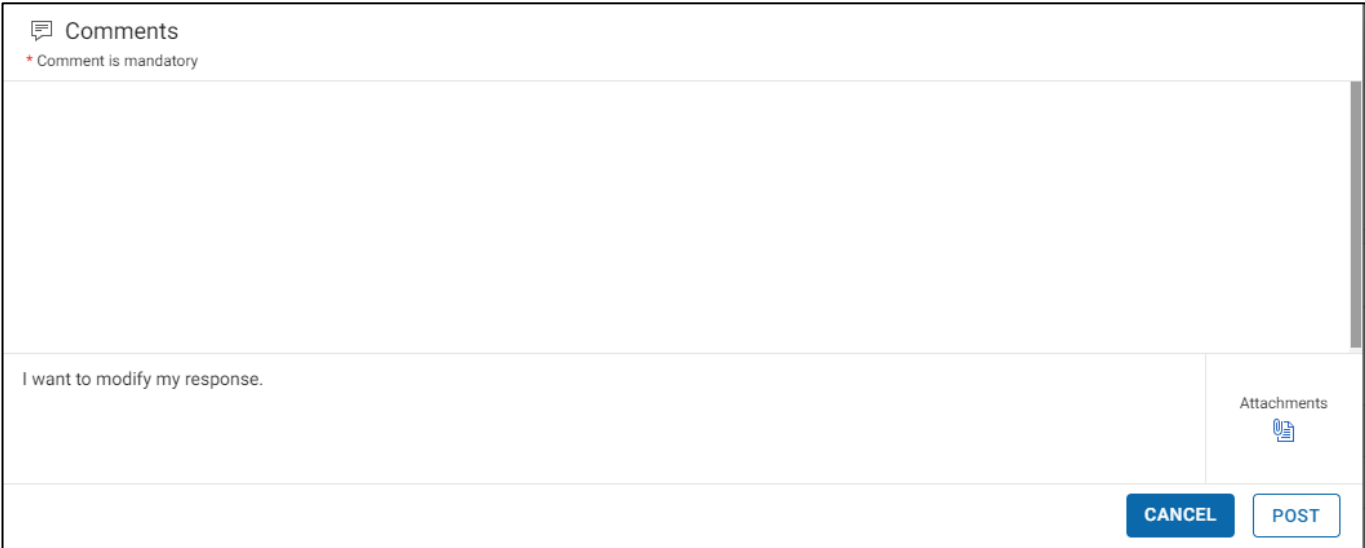Following are the key points related to monitoring feedback with revision:

- On the buyer side, while monitoring bids on the Analyse page, the buyer user gets an on-screen alert if a new revised bid is placed.
- On the supplier side, while bidding, suppliers will receive on-screen alert if their feedback is changed on account of other suppliers placing revised bids.

Chapter 8: Withdrawing Response

Supplier can withdraw supplier submitted responses in a sourcing event, for revision or correction. The revised responses can then be resubmitted until the Response timeline is active.

To withdraw responses:

1) Click the Withdraw **Responses** button at the bottom-right corner of the desired RFx event.

2) Click Yes on the subsequent pop-up.

3) Mention the reason or comments of withdrawing supplier's response in the field provided.

4) Click **Post**.

5) Supplier can also upload an attachment by clicking the Attachment icon.

6) Once supplier have withdrawn supplier's responses, supplier can modify it as required and resubmit it again as explained in Responding to an RFx.

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