

JAGGAER ADVANTAGE

SUPPLIER USER HANDBOOK

PRODUCT VERSION 20.2



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WELCOME

Objectives

The purpose of this handbook is to familiarize supplier users with tasks related to JAGGAER ONE.

- The **Basics** section contains an overview, supplier permissions, and information on navigating JAGGAER ONE as a supplier.
- The **Suppliers** section contains information and instructions on how to register as a supplier and participate in buyer opportunities.

Key Points

The goal of this handbook is to educate supplier users about JAGGAER ONE.

Keep in mind that much of the how, when, and why the system is used is determined by your organization's business practices. We suggest that you supplement this document with your organization's business practices, goals, and policies.

INTRODUCTION

Overview

The JAGGAER Advantage platform is a secure web based collaborative tool used by procurement professionals (buyers and suppliers) to conduct strategic procurement activities online.

Note: This is a generic guide to assist you in using the JAGGAER Advantage platform, your specific experience may vary.

Permissions (User Rights)

The following user rights are related to supplier user configuration and administration. User rights may be configured at the role or user level by an administrator:

RFx

- Visibility of RFx Lists
- Access RFx Details
- Create Response
- Modify Before Publishing
- Modify and Submit
- Contact Visible to Buyer
- Messages Management
- View Sensitive Data (including; attachments, response, pricing etc)

Bid Collectors

- Visibility of Bid Collector Lists
- Access Bid Collector Details
- Create Response
- Modify Response
- Submit Response

- Delete Response
- Contact Visible to Buyer
- Manage Messages Area

Auctions

- Visibility of Auction Lists
- Access Auction Details
- Access to Auction Monitor
- Participate
- Contact Visible to Buyer
- Manage Messages

Contract Management

- Access Contract Details
- Manage Messages
- Contact Visible to Buyer

Supplier Management

- Access Supplier Management

Supplier Performance

- Access Scorecard Results

Development Actions

- Create Action
- View Actions
- Access Action Details
- Contact Selectable as Action Owner
- Manage Messages

User Management

- Manage Users
- Manage Roles
- Manage Users, Roles, Users Lists and Divisions
- Delete Deactivated Users

File Sharing

- Access To Directories

For additional information about enabling user rights, see [Updating the User Rights at the User Level](#) in the Online Help or the [Administrator's Handbook](#).

Navigating

Depending on configuration and user access, you may see the following as a supplier.

Supplier Home Page

The Supplier Home page is usually the default page displayed after login. On some platforms, the Dashboard may be displayed after login.






On the upper right corner of the page, you can find links to view accessibility guidance, access your user profile, and log out. You may change your language, user details, and password within the User Profile.

The main area of the Supplier Home page displays links to the available modules, so you can use this page to reach any part of the platform.

Navigation Menu

The navigation menu is located on the left side of each page, and allows you to navigate from one module to another. To do so, click on a module icon to expand the menu and then select a link, to be directed to the page you want to access.

The following modules may be available:

- **Dashboard**  - The Dashboard contains portlets that provide an overview of your activities and gives you access to them.
- **Sourcing**  - The Sourcing module contains access to projects, sourcing opportunities, auctions, and contracts.
- **My Organization**  - In this module, you can view and manage your profile, categories, assessments, scorecards and development actions.
- **File Sharing**  - This is a buyer managed module. If activated by the buyer organization, you will have read-only access to files that have been made available to you.
- **User Management**  - This module is available to users who are given the rights to manage users, roles and divisions within your organization.

SUPPLIERS

REGISTRATION & ONBOARDING

New suppliers must register on the platform to be considered for sourcing events. Suppliers can be activated immediately or conditionally after the registration process.

In case of conditional activation, suppliers must pass the initial onboarding process (completing all mandatory questions in basic profile forms) in order to access the platform and view sourcing events.

Register as a Supplier (Self-Registration)

Step-by-Step

1. On the application login page, click **Register**. The Registration Data page opens.
2. Complete the registration form with your organization's details and contact information for the main procurement professional within your organization.
 - Mandatory fields are marked with a red asterisk.
 - Ensure the email address is correct in order to receive the registration confirmation email
 - To register multiple email addresses, use a semicolon to separate them.
3. Click **Save**. You may receive a registration confirmation email, depending on buyer configuration. You may also receive a verification code in your email for completing the process.

Profile Form

Your profile collects the important information about your organization. It is important to complete your profile and keep it up to date.

- It contains profile forms that may be used to determine your platform access and supplier status.
- Information accumulates as you interact with the buyer organization.
- Your responses to profile questions will pre-populate in sourcing events when the questions are used in events.
- Your updated response to profile questions in sourcing events and supplier value management objects (eg. Assessments and Scorecard Survey processes) are saved back to your profile.

Complete Basic Profile Form

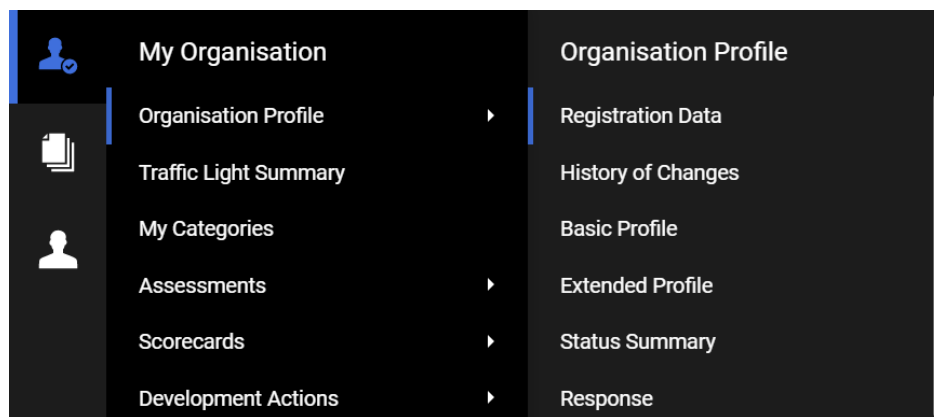
After registering, and depending on configuration, you may be directed to one or multiple basic supplier profile forms to provide additional information related to your company.

Complete the basic profile form or forms. You must complete this information to be considered for activation. You should update your profile as needed to ensure the most up-to-date information is available in the system.

Once the basic form is complete, click **Save & Continue** to proceed with the onboarding process. Once you have completed the basic profile form, you will be emailed a temporary password. Use the user name you entered during registration and the temporary password to log in for the first time. Enter a new password when prompted.

Note: After you are registered (supplier is active), you should update your Profile as needed to ensure the most current information is available in the system. You can navigate to your profile by accessing **My Organization**


 > **Organization Profile** > **Registration Data** on the navigation menu.



Complete Extended Profile Form

Step-by-Step

Extended Profile Forms are available to you after you have successfully registered and logged into the platform.

1. Navigate to **My Organization**  > **Organization Profile** > **Extended Profile**. In the Extended Profile section, the completion status will be displayed under Supplier Data Status. The percentages indicate the completion status of Mandatory and Optional Questions in each form.
2. Click the **Title** to view the form content.
3. Click **Edit** to switch the form to edit mode.
4. Enter responses for all the mandatory questions (red asterisk). It is recommended to answer optional questions, so the buyer has as much information about your organization as possible. Non-editable questions are answered by buyers or provided by an external system.
5. Click **Save and Continue** to save your responses and move to the next form, if applicable.

Login

Login

Step-by-Step

1. Click the link in the registration confirmation email or go to the platform URL to access the login page.
2. Log in with the username and temporary password found in the email.
3. Enter and confirm a new password.

Forgot your password?

Step-by-Step

1. Click on the **Forgot your username and password?** link (text may be different on your platform).
2. Fill in your username and email address.
3. You will receive an email with a link to reset your password.

Forgot your username?

Step-by-Step

1. On the login page, click **Forgot your username and password?**
2. Click **Recover Username**.
3. Enter your email address and validation value.
4. You will receive an email with a link to access your username.

ORGANIZATION PROFILE

To view organization profile information, navigate to **My Organization**  > **Organization Profile**, then select the page you would like to view.

View Organization Profile

- **Registration Data** - Contains a record of the organization details you entered when registering as a supplier. Click the Edit button to change any of the available fields.
- **History of Changes** - Contains a record of the changes made to registration data and primary supplier status (eg. supplier activation).
- **Basic Profile** - Contains a record of the basic profile information you entered when registering (before activation). Click the title of each section to view the details of that section. You can also click the Edit button on the details page of any section to edit the available fields.
- **Extended Profile** - Contains a record of the extended profile information you entered when registering (after activation). Click the title of each section to view the details of that section. You can also click the Edit button on the details page of any section to edit the available fields.
- **Status Summary** - Contains information related to the completeness of your registration and organization status.
- **Response History** - Contains the history of the values answered for each question.

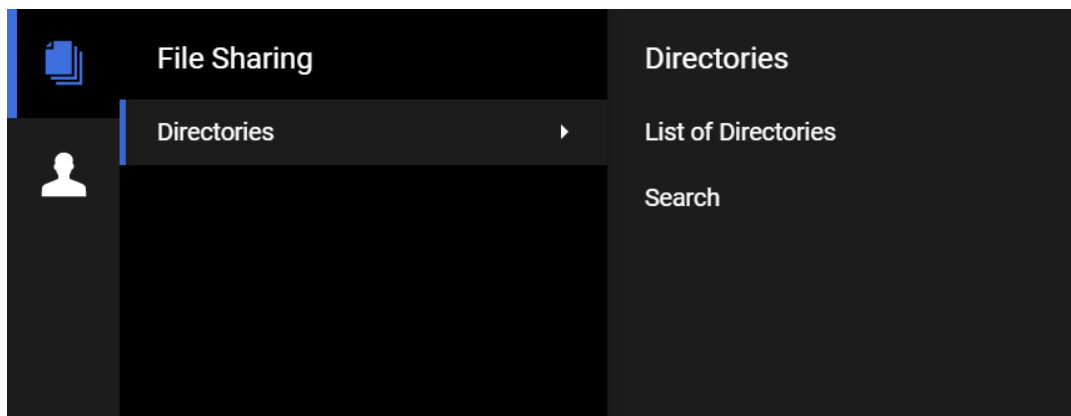
FILE SHARING

With the File Sharing solution, buyers may choose to allow read-only access to files that have been made available to the supplier organization.

View Shared Files

To view shared files, navigate to **File Sharing**  > **Directories**, then select one of the following:

- **List of Directories** - This page lists the shared file directories you have access to.
- **Search** - This page provides advanced search functionality for searching for files shared with you.



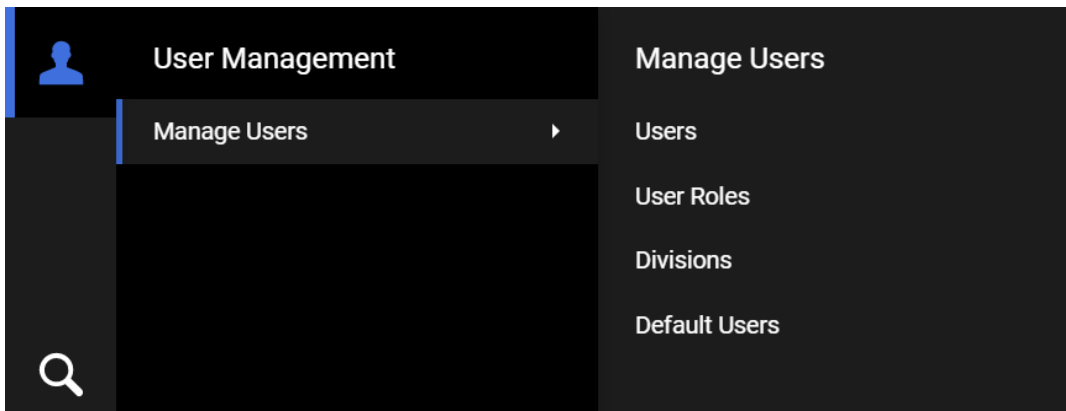
USER MANAGEMENT

MANAGE USERS

The Super User is the first user that registered on the platform and is responsible for managing other users. The User Management module is where the Super User manages individual user accounts, divisions, user roles, and organizational activity assignments.

Depending on configuration and user access, you may have access to the following pages under User Management:

- **Users** - Only users with the "User Setup and Management" right can create user accounts and manage user rights and roles. They can modify User details, modify User Rights, create user Roles and create Divisions.
- **User Details** - This allows you to configure User contact information, Role, Division, language settings, and Username.
- **User Rights** - This allows you to configure user visibility and access rights to RFX, Bid Collectors, Auctions, Contract Management, Supplier Management, Supplier Performance, Development Actions, User Management and File Sharing (if activated by the buyer organization). User Rights can be packaged into User Roles for quick user right assignments.
- **Default Users** - Allows only the Super User to manage a specific User account to receive all email alerts related to events to which your Organization is invited and to manage activities in those events on behalf of your organization.




Users

Only users with **Manage Users** right can create a user account. The "Superuser" has this right by default.

Create User Account


Step-by-Step

1. Navigate to **User Management**  > **Manage Users** > **Users**.
2. Click **Create**. A page for creating the new user opens.
3. Complete the **user details** fields. Mandatory fields are marked with a red asterisk.
4. Click **Save** to create the new user account.

The user will receive a system generated email with their login information. By default, user rights are NOT assigned to a newly added user, unless the user was assigned a Role with user rights configured during account creation.

Edit User rights


Step-by-Step

1. Navigate to **User Management**  > **Manage Users** > **Users**.
2. Click the **user's name** to open the User Details page for that user.
3. Click the **User Rights** link under the Details tab.
4. Click **Edit** to switch to edit mode.
5. Amend the user rights in each module by selecting the relevant options from the dropdown lists.
6. There are typically three levels of access you can select for each user right:
 - No (No access at all)
 - Yes, if I'm added to the User Rights list in the Object (Access is given to user within the individual Auction, RFx, and/or Contract)
 - Yes (Access is given to all events)
7. Click **Save** to save the updated level of access.

Two shortcuts are available (**Set Full Rights** and **Set Minimum Rights**) when editing the user rights in order to set all the permission to the maximum value and minimum value for all rights or a particular section.

Check User Status

Step-by-Step


1. Navigate to **User Management**  > **Manage Users** > **Users**.
2. Open the drop-down menu (Enter Filter) next to the **Filter By** option.
3. Select **User Status** option from the drop-down.
4. Select **Active / Deactivated** option and click on **Search**.
5. The list of users will appear according to your search.

User Roles

Users with the **Manage Roles** or **Manage Users, Roles, User Lists and Divisions** right can group user rights into roles, to quickly apply to users who require the same access configuration. **Note:** The "Superuser" has this right by default. The rights for each user account can still be manually revised after the role assignment.

Create User Role

Step-by-Step

1. Navigate to **User Management**  > **Manage Users** > **User Roles**.
2. Click **Create**. A page for creating the user role opens.
3. Enter a **Role Name**. It must be unique within the organization.
4. Select yes or no in the **Shared Role** dropdown. This determines whether the role is visible and selectable by all divisions
5. Amend user rights for the role as needed.

Note: Two shortcuts are available (**Set Full Rights** and **Set Minimum Rights**) when creating a role in order to set all the permission to the maximum value and minimum value for all rights, or a particular section.
6. Click **Save**. The new user role is created.

You can now return to the existing users and update their Role assignments as needed.


Divisions

Users with the **Manage Users, Roles, User Lists and Divisions** right can create Divisions to group users within the organization. **Note:** The "Superuser" has this right by default.

You can only create a new division if there is a user available to serve as the Division Manager. Each User can only serve as the manager for one division.

Create a Division

Step-by-Step

1. Navigate to **User Management**  > **Manage Users** > **Divisions**.
2. Click **Create**. A page for creating the new division opens.
3. Enter a **Name** and **Description** for the division.
4. Select a user to be the **Division Manager**.
5. Click **Save**. This will trigger a reset of the divisions manager's user rights. Remember to re-define the user rights for the newly appointed division manager.

Default Users

This page allows the super user to manage a specific user account to receive all email alerts related to sourcing events to which your organization is invited, and to manage activities in those events on behalf of your organization.

The super user can set default users for the following:

- Auctions
- RFIs/RFQs
- Bid Collectors
- Contracts
- Opportunity Emails
- Scorecard Surveys
- Development Plans






Delete Users

Depending on the organization's configuration (if this feature is available), users with the **Delete Deactivated Users** right can delete the deactivated users. **Note:** The "Superuser" has this right by default.

This permission will be available only to users belonging to the division of the Superuser.

Delete a User

Step-by-Step

1. Navigate to **User Management**  > **Manage Users** > **Divisions**.
2. Deactivated users are identified with  icon. Select the user that should be deleted:
 - If the user is not deactivated yet, click the  button and choose **Deactivate User** option.
 - Mark the checkbox and click **Confirm**.
 - If you wish to reactivate the user, click the  **Activate User** button when accessing the **User Details** page.
3. Click the  button and choose **Delete User** option.
4. Mark the checkbox and click **Confirm**. The deleted user will be removed from the system.

SOURCING EVENTS

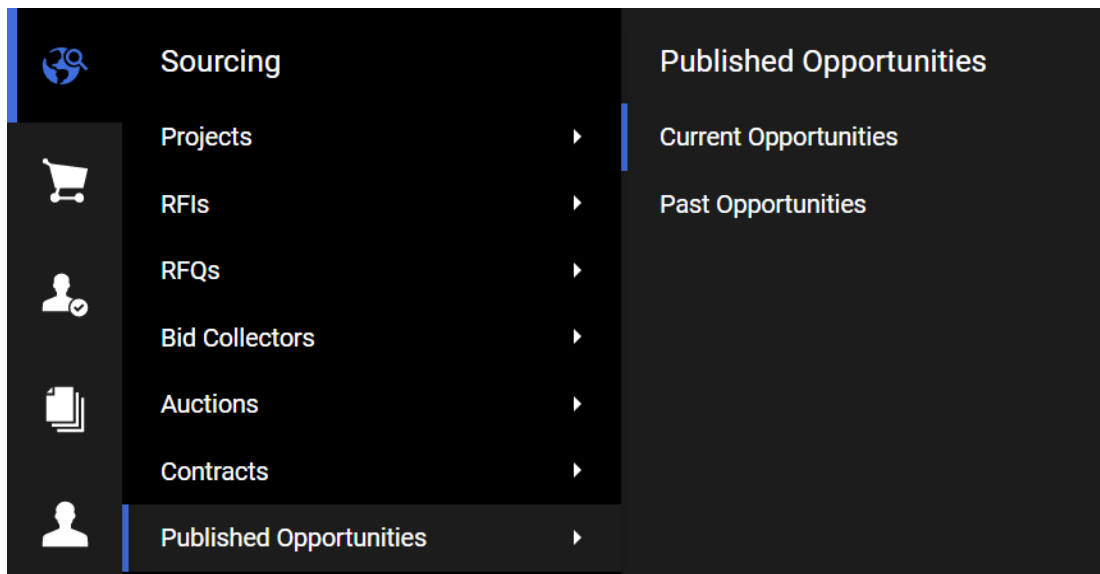
OPPORTUNITIES

Opportunity Listings are used by the buying organization to advertise forthcoming public procurements. Suppliers can then express interest in an RFX that is linked to the Opportunity.

See [RFX](#) for more information.


Published Opportunities

Opportunities can be viewed from the login page by anyone. However, you need to register and login to express interest and participate in sourcing events (linked to opportunities).




Express Interest in a Current Opportunity

Step-by-Step

1. Navigate to **Sourcing**  > **Published Opportunities** > **Current Opportunities**.
2. Click on the project title to view project details.
3. Review project and opportunity details. The Published Lots section displays RFX that are linked to the listing.
4. Click on the **Comment** button beside the RFX you want to express interest in. Details of the RFX are displayed.

5. Review the RFX details and click **Express Interest**. A pop-up opens explaining that you are about to express interest in the RFX.
6. Click **OK**. Another pop-up opens explaining that you have expressed interest in the RFX and to create a response for the RFX.
7. Click **OK**. After expressing interest, depending on the type of RFX, the RFX is moved to either the My RFIs or My RFQs area.

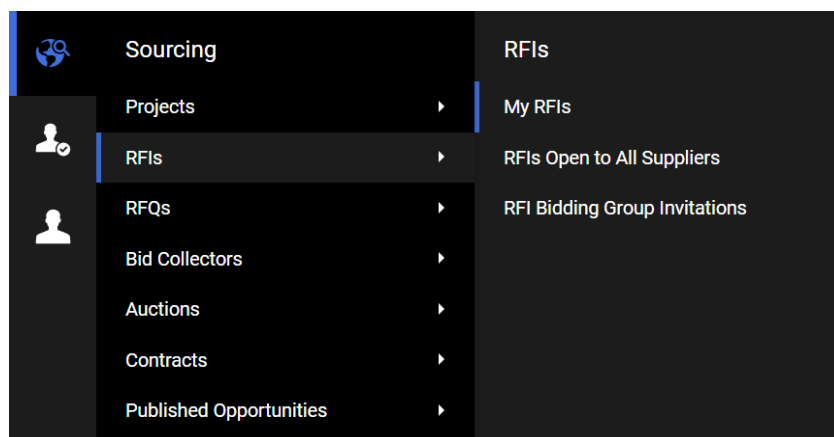
When accessing the list of Sourcing events (e.g. **Sourcing**  **> Published Opportunities > Current/Past Opportunities**), you can see the **Division** column to better identify the companies/divisions of the Buyer Organisation in the negotiation events (including Opportunities, RFX, Contracts and Auctions). This column will be available in case customers are configured with a **Single Buyer Organization** and multiple **Divisions** that correspond to different companies. **Note:** This column must be enabled by the Buyer Organization.

RFX

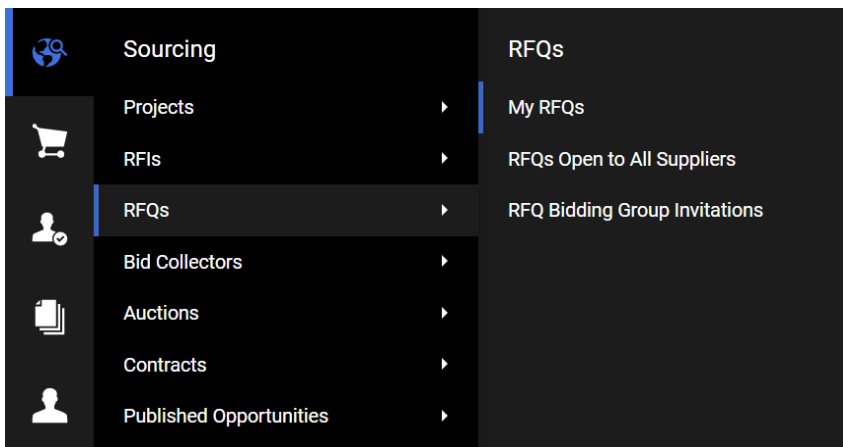
RFX is an umbrella term used to describe a buyer's request submitted to a group of suppliers as a set of questions in order to assess suppliers for an event or project. Supplier responses are sent only to the buyer; no information is shared between suppliers in the group.

The term RFX includes:

- **RFIs** (Requests for Information) are used to collect qualification and technical information from suppliers in order to evaluate the supplier base and to narrow the field of competition to qualified suppliers. Closed RFIs on cannot be awarded, but they can be finalized and converted into RFQs. **Note:** RFI may be indicated as PQQ in some locations.



- **RFQs** (Requests for Quotation) are used to collect detailed technical and commercial information from pre-qualified suppliers in the form of a private offer. Closed RFQs on the platform can be converted into auctions, or they can be awarded and converted into contracts for suppliers. **Note:** RFQ may be indicated as ITT in some locations.



Buyers can configure the settings of an RFx differently, such as the response deadline and awarding strategy, to regulate how suppliers will participate in the event. Buyers can choose from the following options for viewing supplier responses to an RFx:

- **Unsealed** - Responses can be viewed by buyers while the RFx is running.
- **Sealed (sequential/parallel)** - Responses remain hidden from buyers until the RFx deadline has passed.

Prepare and Submit RFx Response


Supplier responses can be provided within the JAGGAER ONE interface, or by downloading the questionnaire in Excel format, completing it offline, and then importing the updated file to the JAGGAER ONE Platform.

Important: Sharing login credentials or multiple users working in the same user account from different web browser sessions or devices can lead to issues and is strongly NOT ADVISED. This behavior can create a concurrency error when the two users are making changes at the same time and may result in updates not being saved.

Prepare RFx Response

Step-by-Step

Note: The following steps display navigation for responding to an RFQ. The steps for responding to an RFI are identical.

1. Navigate to **Sourcing**  > **RFQ**.
2. Select one of the sub-menu items:
 - a. **My RFQs** - View the **Response Status** for each RFQ and identify the RFQs that require action.
 - b. **RFQs Open to All Suppliers** - Filter or browse these lists of all RFQs that are publicly available.
 - i. Each RFQ contains an **Express Interest** action button which moves the RFQ to the **My RFQs** area.
 - ii. Once a publicly-available RFQ has been moved to the My RFQ area, you can view the RFQ details, download buyer attachments, view and send messages, and submit a response.
3. Click the **Title** link to open the RFQ. The RFQ opens to the **My Response** page.
 - Along with the RFQ and project titles and codes, the RFQ header displays the closing date and supplier submission date. If the response date has passed, this information will be highlighted in yellow.
 - If the buyer has provided instructional attachments to the RFQ, a link to the attachments is displayed above the RFQ navigation. This link takes you to the **Buyer Attachments** area.
4. On the **My Response** page, you can choose to **Create Response** or to **Decline to Respond**.
 - Click **Create Response** to begin the response creation process.
 - If you choose to decline, you are presented with an optional field to enter details for declining.

Create Online Response

Step-by-Step

1. Navigate to the RFx and click **Create Response**.
2. A pop-up opens explaining the next steps. Click **OK**.
3. The first section of the response page is the **My Response Summary**. This section keeps track of your response progress based on the mandatory questions answered.
4. Click **Edit Response** to edit your response for each section. Some RFx have multiple sections while others have one.
5. Provide responses to the available questions. Mandatory questions are marked with a red asterisk.
6. Upon completion of a section, click **Validate Response** to ensure that all mandatory questions are answered and that the responses provided are in compliance with the required format.
7. Click **Save and Continue** to save. Alternately, click **Save and Return** to save and exit the current section and navigate back to the **My Response** page.

Create Offline Response

Step-by-Step

If you want to respond to the RFx offline, you can download the questionnaire as an Excel spreadsheet, complete it offline, then import the file to populate the online RFx with your answers.

1. Navigate to the RFx and click **Create Response**.
2. Click the ... dropdown button and select **Export/Import Response**.
3. Click **Download** to download the questionnaire in Excel format.

Note: If you have questions regarding the types of questions and how to work with the Excel questionnaire, click **Help To Create & Import Your Response** for detailed instructions (**RFQ details > My Response Page > Export/Import Response > "Help To Create & Import Your Response"** button). A new browser will open to guide you on creating and importing a response by Excel spreadsheet.

4. Open the Excel file locally and answer the questions. Cells for mandatory responses are color-coded yellow. Cells for optional responses are color-coded blue.
5. When done, save the file and return to the **Export/Import Response** page.
6. Use the **Choose File** look-up to select your file, then click **Import Excel** to upload your response.
 - The system will run a compliance check to ensure that there are no missing rows, invalid responses, or missing mandatory responses. If all validation checks pass, the file is uploaded. If not, you are prompted to correct the errors indicated by the system message and re-import the questionnaire.
7. Click **Save Changes** to save.

Submit Response

When the response is complete, you can publish your responses to the buyer organization by clicking **Submit Response** on the **RFQ Details > My Response** page.

If any mandatory data is missing or invalid, a pop-up box will indicate the fields that must be corrected before the response can be submitted.

Step-by-Step

1. Navigate to the RFx.
2. Click **Submit Response**. A pop-up opens explaining that you are about to submit the response.
3. Click **OK**. A pop-up opens explaining that you have submitted your response.
4. Click **OK**. In the RFx header, the response status changes from Not Submitted Yet to Response Last Submitted On [date/time].

Manage an RFx

Modify Response

Suppliers may edit and resubmit their responses at any time before an RFx's **Closing Date and Time**.

- To modify responses online, navigate to **RFQ Details > My Response** and click **Edit Response**. When finished, you have the option to **Keep Changes** or to **Discard Changes**. Once all changes are complete, click **Submit Changes** to finalize the modifications.
- To modify responses offline, download the Excel questionnaire, update your responses, and then import the questionnaire into the system.

Suppliers may be asked to modify their responses under the following conditions:

QUALIFICATION ENVELOPE CLARIFICATION

If buyers need to have clarifications made to qualification responses, selected suppliers will receive an alert. If you are selected, you will see an **Edit Response** button beside each section that is editable in your RFx response. Click **Edit Changes** and **Keep Changes** in order to return to the response overview page and access a **Submit Changes** button.

NEW ROUND LAUNCHED IN CURRENT RFQ

In the new round, buyers may choose which sections, questions and items are made available for suppliers to edit and resubmit. Selected suppliers receive an alert about the new status of the RFx.

If you are selected, you will see an **Edit Response** button beside each section that is editable in your RFx response. You must click **Edit Changes** and **Keep Changes** (if you decided to update your response) in order to return to your response overview page and access a **Submit Changes** button.

ASK FOR BEST AND FINAL OFFER

The **Best and Final Offer (BAFO)** feature allows buyers to ask selected suppliers to amend and resubmit responses to the Commercial envelope by a specified deadline. Buyers may choose which sections, questions and items are made available for the supplier to edit and resubmit. Selected suppliers receive an alert about the new status of the RFx.

If you are invited to a BAFO round, you will see an **Edit Response** button beside each section that is editable in the RFx response. To provide a Best and Final Offer, update your response, then click **Edit Changes** and **Keep Changes** to return to the response overview page and access a **Submit Best and Final Offer** button.

TAKE IT OR COMPETE (TIOC)

The **Take It or Compete (TIOC)** option supports a process by which buyers can ask one or more suppliers to update their offers to match the buyer proposals.

- Suppliers who receive a TIOC offer, see the RFQ status listed as "TIOC in Progress" and the Response status listed as "New Offer Required".
- While the RFQ is in "TIOC In Progress" status, suppliers can access the Commercial envelope and click one of the following action buttons:
 1. **Edit Response to Match Total Price** - Clicking this option opens the Commercial section in edit mode. When the TIOC response is submitted, the answer status becomes "Response Submitted to Buyer".
 - If the **Confirmed Price** is visible to you and your offer differs from the **Confirmed Price** by more than 1%, a warning message will appear on screen. The message requests your confirmation, but does not block you from submitting the response. **Note:** The 1% default value can be customized based on customer preference.
 2. **Decline** - When you decline a TIOC, an optional **Comments** box is available for you to submit additional information. When you decline an offer, the answer status becomes "TIOC Declined".

Note: If the RFQ requires a digital signature, suppliers must sign for the new TIOC Commercial envelope.

UPDATE FINAL PRICE

- The outcome of some RFQ-to-auction events can require buyers to ask one or more suppliers to update the RFQ offers based on the winning bid in the auction. Invited suppliers receive an email alert about the new status of the RFQ.
- If you have been invited to participate in an **Update Final Price**:
 - You will see the RFQ status "Update Final Price in Progress". The answer status is "New Offer Required". RFQs in this status are listed in the **My RFQs with Pending Responses** widget.
 - You will see a button labeled **Edit Response to Match Total Price** inside the Commercial section of the **My Response** page. Clicking this option opens the Commercial section in edit mode. Suppliers can edit only the sections and items that have been selected by the buyer. The visibility of the **Confirmed Price** and **Instructions** depends on the configuration selected by the buyer.
 - After you edit your response, click the **Submit Confirmed Price** button.
 - If the **Confirmed Price** is visible and the price you offered differs from it by more than a percentage that is acceptable to the buyer, a warning message requiring your confirmation is displayed.
 - After you submit a response to an **Update Final Price**, the answer status changes to "Response Submitted to Buyer".
 - The **Edit Response to Match Total Price** button is available until the **Update Final Price** deadline is reached. You can edit and resubmit your response as often as necessary until that time.
 - Although you can choose not to submit a new response to the RFQ, unlike the TIOC process, there is no **Decline** button available.
 - Once the buyer closes the **Update Final Price** process, the RFQ status is updated to "Closed: To Be Evaluated".
- If a digital signature is required, you must sign the new commercial envelope.


Delete Response


If the answer has not been submitted, you may delete the response at any time before an RFx's closing date and time. If the answer has been submitted, you may delete the responses only during the first round of the sealed RFx.

To delete a response, navigate to **RFQ Details > My Response** and click the **Delete Response** option in the **More**  **menu**.

Once confirmed, your previous response will be deleted. You are returned to the **My Response** page, where you have the options to **Create Response** or **Decline to Respond**.

Withdraw Response

Depending upon RFx configuration, you might have the option to withdraw from the RFx without deleting your response. To withdraw from the RFx, navigate to **RFQ Details > My Response**. A **Withdraw Response** button appears beside the **More**  drop-down menu at the top of the **RFx Details > My Response** page. When you click this button, the following changes occur:

- A confirmation pop-up appears, requiring you to click **OK** to confirm the RFx withdrawal.
- All response details are saved in draft version and the RFx status returns to "Response to Be Submitted to Buyer".
- An alert is sent to both the buyer and the supplier indicating that the response has been withdrawn.
- A **Delete Response** option appears in the **More**  drop-down menu at the top of the **RFx Details > My Response** page.

Suppliers that have withdrawn from the RFx can still submit responses any time before the RFx closing date and time.

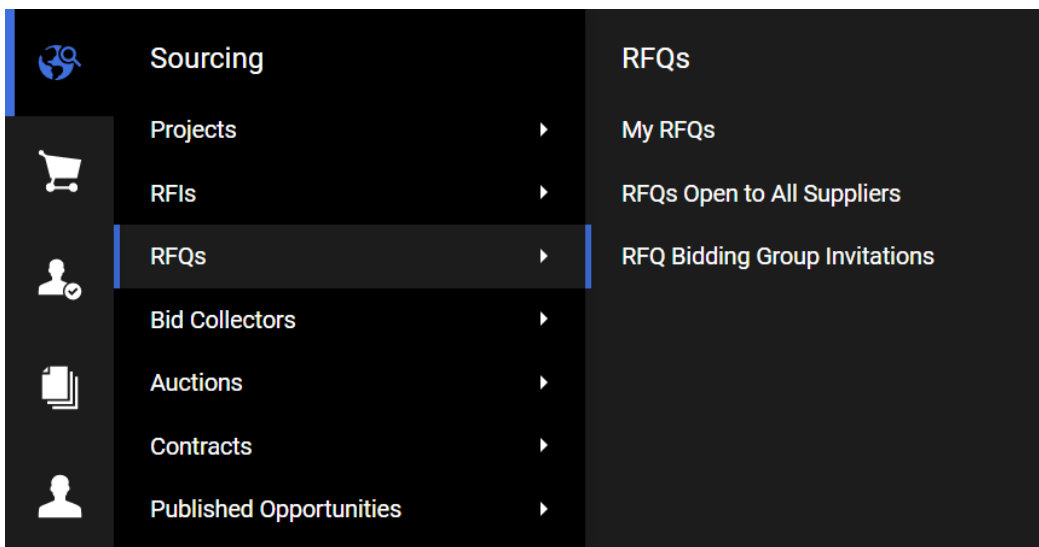
Manage Bidding Groups

The following terminology applies to the "Bidding Groups" process:

- Supplier groups are referred to as **Bidding Groups**.
- The supplier organization that physically submits the bid and manages the bidding group is referred to as the **Bidding Group Leader**.
- All the suppliers participating in a bidding group are referred to as **Group Members** or **Bidding Group Members**.
- **Consortium** refers to a supplier organization or legal entity that has its own VAT/fiscal code and a specific legal structure which is defined globally and associated to the supplier during registration or organization profile management.

Depending on general site configuration and on the negotiation settings selected by the buyer, **Bidding Group Leaders** may have the option to manage bidding groups with the following types of members:


- **Offline-only members** (current configuration) - Bidding Group Members are not registered in JAGGAER ONE. The Bidding Group Leader provides all information to the other members of the bidding group.
- **Registered-only members** - All Bidding Group members are registered in JAGGAER ONE. The Bidding Group Leader enlists all group members:
 - If you are registered with JAGGAER, you will receive an email invitation from the Bidding Group Leader to participate in the event.
 - If you are not registered, you will receive an email invitation from the Bidding Group Leader to register on the platform before participating in the event.
- **Mixed members** - The Bidding Group consists of both **Offline** members and **Registered** members.



IDENTIFYING THE BIDDING GROUP TYPE



- When you click **Create Response** in an RFX that has been configured to allow responses by Bidding Groups, a screen overlay appears. You cannot close this overlay until you select one of the choices presented on the overlay to indicate if you are bidding as a single organization or as a group and to identify the type of group you lead:

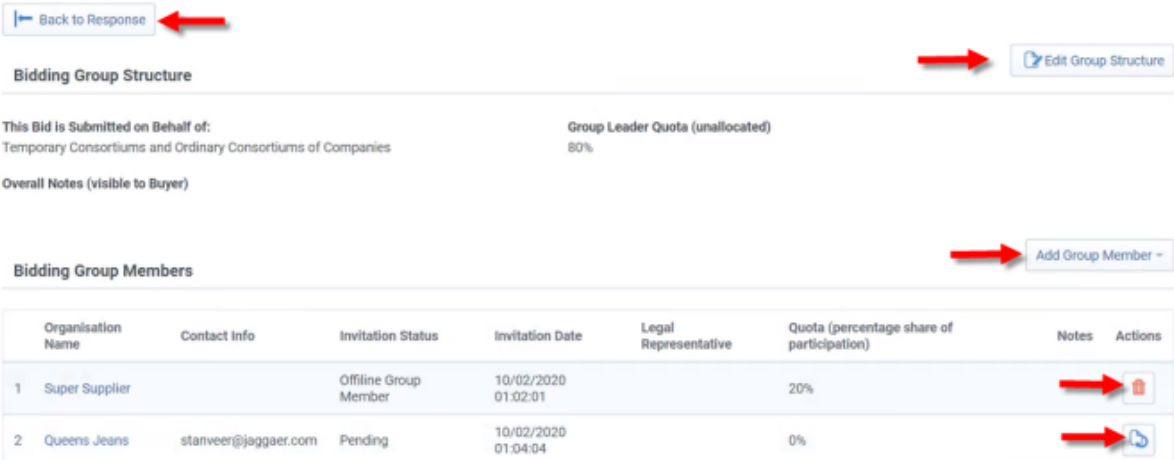
- If you select one of the Bidding Group choices, a **Bidding Group** section appears in the **My Response** page. A **Manage Bidding Group** button appears in this section. You should click this button to configure the Bidding Group.
- If you identify as a Single Organization, the **Bidding Group** section does not appear on screen.

However, an option called **Create Bidding Group** appears within the More  drop-down menu at the top of the **My Response** page. Clicking this option launches the screen overlay on which you will identify the type of Bidding Group you lead.



- After clicking either the **Manage Bidding Group** button or the **Create Bidding Group** button, you will land on a **Bidding Group Structure** page in read-only mode. If the RFx is in a stage in which it can be edited, an **Edit button** will be available.

CONFIGURING THE BIDDING GROUP

- Bidding Group Leaders can perform the following actions when the **Bidding Group Structure** page is accessed:
 - **Back to Response:** Returns the user to the **RFQ Details > My Response** page.
 - **Edit Group Structure:** Allows Bidding Group Leaders to edit field entries on the Bidding Group Structure page.
 - Bidding Group type can be changed from Single Organization to a Bidding Group only if the RFx response has not been submitted.
 - If the leader changes the type from a Bidding Group to a Single Organization, recall alerts are sent to all **Registered** suppliers in "Pending" or "Accepted" status. All information associated with the Bidding Group is removed from the event.
 - When the type of Bidding Group is changed to another Bidding Group type, the leader remains on the **Bidding Group Structure** page.
 - **Add Group Member:** Allows Bidding Group Leaders to manage the Bidding Group membership.
 - Depending on site configuration, the Group Leader may need to select whether the new group member is **Offline** or **Registered**. Depending on the selection, the Group Leader is navigated to a page designed specifically for managing that type of Group Member.
 - **Delete Group Member:** Click the trash can icon  in the **Actions** column that corresponds to the group member that will be removed.
 - **Recall Member Invitation:** Click the recall icon  in the **Actions** column that corresponds to the group member that will be uninvited. Note: The group members' invitation must be in Pending status.



The screenshot shows the 'Bidding Group Structure' page. At the top left, there is a 'Back to Response' button with a left-pointing arrow. At the top right, there is an 'Edit Group Structure' button with a gear icon. Below the header, there is a section for 'Overall Notes (visible to Buyer)'. Below that is the 'Bidding Group Members' section, which includes an 'Add Group Member' button with a plus icon. The main part of the page is a table with the following data:

Organisation Name	Contact Info	Invitation Status	Invitation Date	Legal Representative	Quota (percentage share of participation)	Notes	Actions
1 Super Supplier		Offline Group Member	10/02/2020 01:02:01		20%		
2 Queens Jeans	stanveer@jaggaer.com	Pending	10/02/2020 01:04:04		0%		

- The following fields can be edited on the **Bidding Group Structure** page:
 - **Overall Note:** Used to provide additional details or information about the bidding group. The maximum character length is 2000. Entries in this field are visible to the buyer.
 - **Consortium Members Quota:** Percentage of the bid for which each Group Member is responsible. The percentage for each member must consist of a number between 0 and 100. The total quota sum for all members, including the Bidding Group Leader, must equal 100.
 - The **Group Leader Quota (Unallocated)** is displayed at the top of the table, but it is not an editable field. This quota is systemically calculated by subtracting the total of all Group Member Quotas from 100.

MANAGING BIDDING GROUP MEMBERS

- If an RFx that allowed Bidding Groups is copied and published as a new RFx by the buyer, the Bidding Groups are handled as follows:
 - **Offline** members remain in this status and are immediately considered "Active" members of the group.
 - **Registered** members are created in "Invitation to be Sent" status. The Bidding Group Leader can change the bidding group membership.
- After the Group Leader publishes the group's first response to an RFx, only the following changes can be made to the group membership:
 - Addition of new offline members.
 - Removal of registered members.
 - Management of quotas for each single member.
- The **Bidding Group** cannot be edited during these stages in an RFx:
 - When the buyer creates an amendment to the supplier response.
 - When a new round or a Best and Final Offer (BAFO) are opened by the buyer.

RFx Messages

When the messaging feature is activated, suppliers can contact the buyer through the Messages area within the RFx with any questions related to the event.

Note: The **End Date for Buyer Replies to Messages** field on the RFx Settings page indicates the date by which the buyer can respond to queries.

Create and Send Message to Buyer

Step-by-Step

1. Navigate to the RFX.
2. Navigate to the **Messages** tab, then click **Create Message**. A page for creating the new message opens.
3. Select a **Message Classification**. Classify the message if the buyer organization has the categories configured.
4. Enter a **Subject**.
5. Enter the **Message**.
6. Optionally, add an attachment to support your message.
7. Click **Send Message**.

Under the Messages tab, a Sent Messages area is displayed. From this page, you can keep track of sent messages, see if they were read by the buyer, and see the message replies.

Reply to Buyer Message

Step-by-Step

1. Navigate to the RFX.
2. Under the **Messages** tab, navigate to the **Received Messages** page.
3. Click **Reply** to compose your message to the buyer.
4. Click **Send Message** to send your reply.

AUCTIONS

You may encounter the following types of auctions as a supplier using Sourcing+.

English Auction:

- **Forward** - Bidding starts with a low price, and is raised as higher bids are solicited until either the auction is closed or no higher bids are received.
- **Reverse** - Bidding starts with a higher price, and is decreased as lower bids are solicited until either the auction is closed or no lower bids are received.

Japanese Auction:

- **Forward** - Bidding starts with a low price. For each bid, the buyer raises the price and presents it to all suppliers. Each supplier must signal their willingness to remain in the auction at the current price. The auction is over when only one supplier remains, or when only a pre-set number of suppliers remain.
- **Reverse** - Bidding starts with a high price. For each bid, the buyer lowers the price and presents it to all suppliers. Each supplier must signal their willingness to remain in the auction at the current price. The auction is over when only one supplier remains, or when only a pre-set number of suppliers remain.

Dutch Auction:

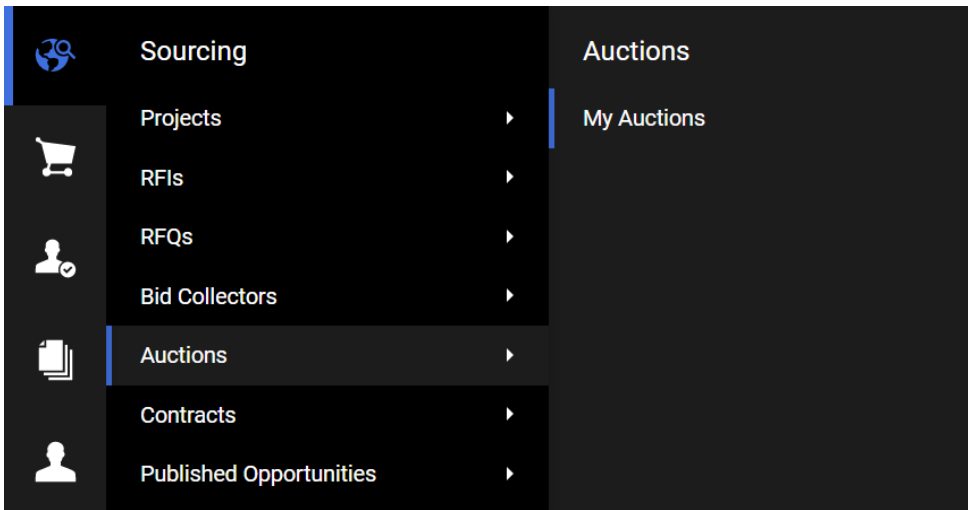
- **Forward** - The buyer offers bids in fixed intervals which decreases every time until a reserved price is reached. Before the reserved price is reached, if a supplier places a bid for the item, it is allocated to the supplier and the item closes for bidding.
- **Reverse** - The buyer offers bid in fixed intervals which increases every time until a reserved price is reached. Before the reserved price is reached, if a supplier places a bid for the item, it is allocated to the supplier and the item closes for bidding.

Lot Auctions:

- **Single Lot** - (English, Japanese, or Sealed Bid) - This type of auction consists of a single lot of one or more items. A single-lot auction involves the same set of suppliers and the same start and end times for all of the items in the lot.
- **Multi Lot** - (English or Dutch - This type of auction may have both single-item lots and multiple-item lots.
- **Staggered Multi-Lot Auctions (English)** - Bidding on all lots opens at the auction **Start Time**, but each lot closes sequentially after a defined interval. Staggered multi-lot auctions allow you to focus your attention on the single lot that is in its closing minutes of bidding time.
- **Parallel Multi-Lot Auctions (English)** - Each lot can have the same or different sets of suppliers, and all lots have the same start and end times.


Multi-Currency Auctions:

- Buyers configure a list of available **Currencies** and **Exchange Rates** at the auction-level and you can select one of these currencies in which to enter your bids. You may choose different currencies for different lots in multi-lot auctions.



Manage Auctions


View My Auctions

To view auctions, navigate to **Sourcing**  > **Auctions** > **My Auctions**. In the My Auctions area, you will see a list of auctions you've been invited to. The title, status, start time, end time, and Buyer Organization will be displayed for each auction.

Note: The Auction monitor icon will only appear in the **Monitor** column for Auctions with a Confirmed, Running, Suspended, Terminated, Not Awarded, or Awarded status.

Launch Auction Monitor

Step-by-Step

1. Navigate to the auction you are invited to, and click on the **Auction Monitor**  icon.
2. The **Auction Monitor** will load.



3. By default, you see the **Event Currency**. You can use the currency drop-down to select a different currency

from among those configured for the auction; after which, you can enter your bids in your selected currency.


4. A calculator icon displays the bid amount in **Event Currency**. By clicking on the calculator icon, you can enter a value in the **Event Currency** and have it automatically converted to your selected currency.
5. **Best Bid**, if configured to be visible to suppliers, is always displayed in Event Currency.
6. The **My Bids** tab displays the bids using the selected Response Currency. If suppliers enter bids in different currencies, they will be displayed accordingly.

Note: The **All** tab, if visible, displays all bids, including the supplier's own bids, in the Event Currency. Suppliers cannot access information about other suppliers' currencies.

7. **Start Price** and **Minimum Bid Improvement** are always displayed in the Event Currency.
8. Bid confirmation messages display bid amounts in suppliers' selected currencies and also the approximate value in the **Event Currency**.

Enter and Submit Bids

Step-by-Step

1. Once you accessed the **Auction Monitor** page, select the lot that you would like to bid on.
2. Click into the **Unit Price** box and enter your bid, which must be compliant with the Minimum Bid Decrement displayed in the Auction Details.
 - Your next bid (for the lot) should always be lower or higher depending upon auction orientation. The Unit Price cell will turn yellow if there's a change in price; otherwise it will remain in green.
3. Click the **Submit** button in order to send your new bid or click **Reset** to delete the entered bid.
4. Once you have clicked **Submit**, a pop-up box will ask if you want to confirm your bid submission.
5. Click **OK** to confirm. Once the new bid is submitted, a pop-up will notify you that the bid has been successfully accepted.
6. Click **OK** to continue bidding.
 - To bid on multi-items and multi-lots, click the  arrow beside a multi-item lot to access the information about that lot and enter bid amounts. The **Submit** button is not available until you have specified a Unit Price for all items in the multi-item lot.

Modify Duplicate Bid

Step-by-Step

If the buyer has configured the RFX to reject duplicate bids, you will not be allowed to enter the same bid value that was entered by another supplier.

1. Click OK if the notification appears to inform you that the bid was already issued by another supplier.
2. Update your price in the Unit Price cell(s) so the bid value is lower than the duplicate bid.

Modify Bids that are Non-compliant with Minimum Bid Decrement

Step-by-Step

Bid reductions must meet the buyer's requirements for the RFX. If your bid is too high or too low to be accepted:

1. Click OK if the notification appears to inform you that the bid is not low enough or is too low.
2. Update your price in the Unit Price cell(s) so the bid value is decreased by the amount indicated in the Minimum Bid Decrement field.

Manage Auction Messages

Create and Send Messages to the Buyer

Step-by-Step

To communicate with the buyer organization during an auction, you can use the Message feature within the Auction Monitor

1. Click the **Message** tab in the Auction Details section.
2. Click the **New Message** button at the bottom of the tab.
3. Enter your message in the pop-up box.
4. Click **Send** to send your message to the buyer.

View Received Messages

Step-by-Step

When the buyer replies or sends you a message during an auction, it will be displayed as a notification on the Auction Monitor.

1. Review the message and click **OK** to return to the Auction Monitor.
2. To view the message again or other buyer messages, you can find them in the Messages section. Click on the Sender column heading to sort the list and bring the buyer messages to the top of the list.

Manage Final Bids

Bid Overtime Interval

The **Bid Overtime Interval** is a time extension that is added to the auction end time or that will reset the end time by 'x' minutes in the final minutes of the auction. The setting is indicated in the Date & Time Settings section of the Auction Details page.

If the countdown of an auction with Overtime Interval is set to "Add 3 minutes", once the Time Remaining drops under 3 minutes and you enter a bid on a lot (any lot if it's a multi-lot auction), the countdown will re-set to 3 minutes.

Auction Closing Notification

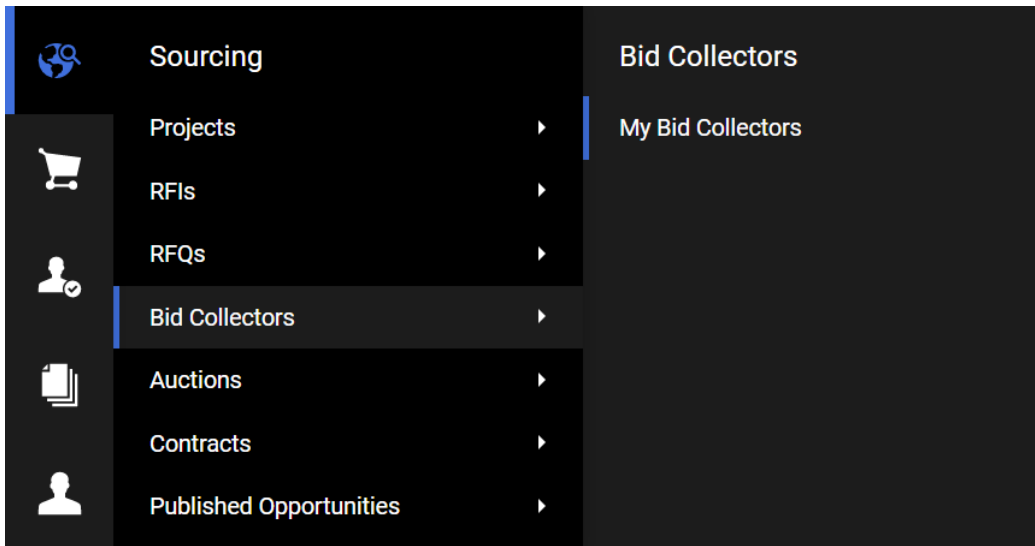
When the auction has ended, you will receive a pop-up notification that the lot is closed. You will no longer be able to place bids for the lot. Click **OK** in the pop-up notification. Exit the Auction Monitor or continue to bid on other running lots.

BID COLLECTOR

When sourcing a massive purchase event, buyer organizations require a significant amount of information from suppliers. **Bid Collector (BDC)** is a direct response to this commercial market need for managing large Request For Quotations (RFQs). The **Bid Collector** simplifies these complex sourcing events for both buyers and suppliers. With **Bid Collector**, users can:

- Manage large numbers of items and columns.
- Capture bidding on large market baskets with tens of thousands of items.
- Capture hundreds of item-identifying costs and attributes per item.
- Manage item properties in a single location across all envelope sections.

Buyers can configure the settings of a **Bid Collector** differently, such as the response deadline and item list configuration, to regulate how invited suppliers will participate in the event.




Prepare and Submit Bid Collector Response

Supplier responses can be provided within the JAGGAER ONE interface (if there is any **Question Section**) and by downloading the Bid Sheet in Excel format (for **Price Section**), completing it offline, and then importing the updated file to the JAGGAER ONE Platform.


Prepare Bid Collector Response

Step-by-Step

1. Navigate to **Sourcing**  > **Bid Collectors** > **My Bid Collectors**.
2. Click the **Title** link to open the Bid Collector. The Bid Collector opens to the **My Response** page.
 - Along with the Bid Collector and project titles and codes, the Bid Collector header displays the closing date and supplier submission date.
 - If the buyer has provided instructional attachments to the Bid Collector, a link to the attachments is displayed above the Bid Collector navigation (highlighted in yellow). This link takes you to the **Buyer Attachments** area.
3. On the **My Response** page, you can choose to **Create Response** or to **Decline to Respond**.
 - Click **Create Response** to begin the response creation process.
 - If you choose to decline, you are presented with fields to enter the reason and details for declining.

Response to Question/Discount Section Online

Step-by-Step

1. Navigate to the Bid Collector **Sourcing**  > **Bid Collectors** > **My Bid Collectors** and click **Create Response**.
2. The first section of the response page is the **Response Summary**. This section keeps track of your response progress based on the mandatory questions answered.
3. Click **Edit Response** to edit your response for **Question Section**. Some Bid Collectors may have multiple question sections while others have none.
4. Provide responses to the available questions. Mandatory questions are marked with a red asterisk.
5. Upon completion of a section, click **Save**. Navigate to the next **Question Section** if any, and follow the same steps.

Response to Price Section Offline

Step-by-Step

To respond to the Bid Collector item list, you must download the Bid Sheet as an Excel spreadsheet, complete it offline, then import the file to populate the online Bid Sheet with your answers.

1. Navigate to the Bid Collector and click **Create Response**.
2. In the **Price Section**, click **Generate Bid Sheet** button under "Action" area. When the Bid Sheet is generated, you will receive a pop-up. Click **OK** to proceed.
3. To download the Bid Sheet file, click **Download Bid Sheet**.
4. Open the excel file, read the instruction in the first sheet **Instructions**, then navigate to the second sheet **Bid_Response** to fill out your response.

Note: Cells for mandatory responses are color-coded yellow. Cells for optional responses are color-coded blue.

5. When done, save the file and return to the **My Response** page.
6. Click the **Import Bids** button, use the **Choose File** look-up to select your file, then click **Import Excel** to upload your response.
 - The system will run a compliance check to ensure that there are no missing rows, invalid responses, or missing mandatory responses. If all validation checks pass, the file is uploaded. If not, you are prompted to correct the errors indicated by the system message and re-import the questionnaire. You can track the upload **Progress** and the **Import Status** from the bottom of the page.

7. You will receive a pop-up message once the upload is completed. Click **OK** to proceed. **Note:** If any mandatory data is missing or invalid, a pop-up box will indicate the fields that must be corrected before the response can be submitted.

Note: If there are more than one "Price Section" in **My Response** page, you should follow the above steps to respond to all sections.

Submit Response

When the response is complete, you can publish your responses to the buyer organization by clicking **Submit Changes** on the **Bid Collector Details > My Response** page.

If the Bid Collector has more than one "Price Section", the Bid Sheet for all sections should be imported prior to submitting the response.


Step-by-Step

1. Navigate to the Bid Collector.
2. You can see the "Section Status" is updated to **Ready to Submit**.
3. Scroll up and click **Submit Response** to submit your response. You will receive a pop-up, press **OK** to proceed.
4. Notice the "Section Status" is updated to **Submitted**, and your response is successfully submitted to the buyer.

Manage a Bid Collector

Modify Response

Suppliers may edit and resubmit their responses at any time before a Bid Collector's **Closing Date and Time**. To modify your response:

1. Navigate to **Sourcing**  **> Bid Collectors > My Bid Collector > Choose BDC > My Response** page.
2. Click **Revise Bid**. You will get a pop-up message.
3. Press **OK** to begin the revision process.
4. In the **Price Section**, click **Generate Bid Sheet** button under the "Action" area. When the Bid Sheet is generated, you will receive a pop-up. Click **OK** to proceed.
5. To download the Bid Sheet file, click **Download Bid Sheet**.

6. When updating your Bid Sheet:

- Click **Import Bids** to upload the revised Bid Sheet.
- Click **No Bid** if you want to apply a response of "No Bid" to all items of the selected section.

Note: The **No Bid** option is provided as a fast and convenient method of marking that you are not interested in providing bids for any of the items in the price section. The same effect could be created by manually downloading the bid sheet, editing it to mark every item with an "X" in the column for indicating that no bid is being provided for the item, and then importing the resulting workbook. The **No Bid** is mainly useful for bid collectors with multiple price sections where you are not bidding on an entire price section, or for cases where you are bidding on a small number of items in a price section and choosing to "No bid" the majority of them.


7. When completed, you have an option to **Submit Changes** to submit the revised price to the buyer or **Decline to Respond**. Once all changes are completed, click **Submit Changes** to finalize the modifications.

Note: If you do not submit your changes prior to the document deadline, the buyer will see your last submitted response information only. You can also choose to revert back to your last submitted response by clicking **Abandon Changes**.

Delete Response

If the answer has not been submitted, you may delete the response at any time before a Bid Collector's closing date and time.

To delete a Bid Collector response:

1. Navigate to **Sourcing**  > **Bid Collectors** > **My Bid Collector** > **Choose BDC** > **My Response** page.
2. Click the **Revise Bid** option.
3. Click **Clear Bids** to delete your responses "Per Section".
4. Once your responses are deleted for all sections, you are returned to the **My Response** page:
 - **Note:** **Clear Bid** option will clear the bid data for the price section so that you can restart your bid from scratch. After selecting this option, you will not be able to submit your response to the bid collector document until you import a revised bid for the price section, or select to "**No bid**" the price section. This option only alters your working bid, and will not clear any data from your last submitted response.

If you have previously submitted a bid for the bid collector and wants to remove it from consideration, you should select "**Revise Bid**" followed by "**Decline To Respond**" prior to the closing date of the Bid Collector so the response will NOT be shown to the buyer.

Withdraw Response

After deleting a response, you have the option to withdraw from the Bid Collector. To withdraw from the Bid Collector, navigate to **Bid Collector Details** > **My Response** and click **Decline to Respond**.

Suppliers that have withdrawn from the Bid Collector can still submit responses any time before the Bid Collector closing date and time. To return to the Bid Collector response creation process, suppliers can navigate to **Bid Collector Details > My Response** and click **Undo Decline**.

Step-by-Step

If you would like to withdraw from the Bid Collector, you must delete all responses entered previously, then proceed with the following:

1. Navigate to the Bid Collector.
2. From the My Response page, click the **Decline to Respond**, enter the reason and provide details.
3. Click **Decline to Respond**, then press **OK**. The system will notify the buyer of the withdrawal.

You can still submit responses at any time until Bid Collector Closing date. To do so, use the **Undo Decline** feature on the **My Response** page.

Bid Collector Messages

Suppliers can contact the buyer through the Messages area within the Bid Collector with any questions related to the event.

Note: The **End Date for Buyer Replies to Messages** field on the Bid Collector Settings page indicates the date by which the buyer can respond to queries.

Create and Send Message to Buyer

Step-by-Step

1. Navigate to the Bid Collector.
2. Navigate to the **Messages** tab, then click **Create Message**. A page for creating the new message opens.
3. Select a **Message Classification**. Classify the message if the buyer organization has the categories configured.
4. Enter a **Subject**.
5. Enter the **Message**.
6. Optionally, add an attachment to support your message.
7. Click **Send Message**.

Under the Messages tab, a **Sent Messages** area is displayed. From this page, you can keep track of sent messages, see if they were read by the buyer, and see the message replies.

Reply to Buyer Message

Step-by-Step


1. Navigate to the Bid Collector.
2. Under the **Messages** tab, navigate to the **Received Messages** page.
3. Click **Reply** to compose your message to the buyer.
4. Click **Send Message** to send your reply.

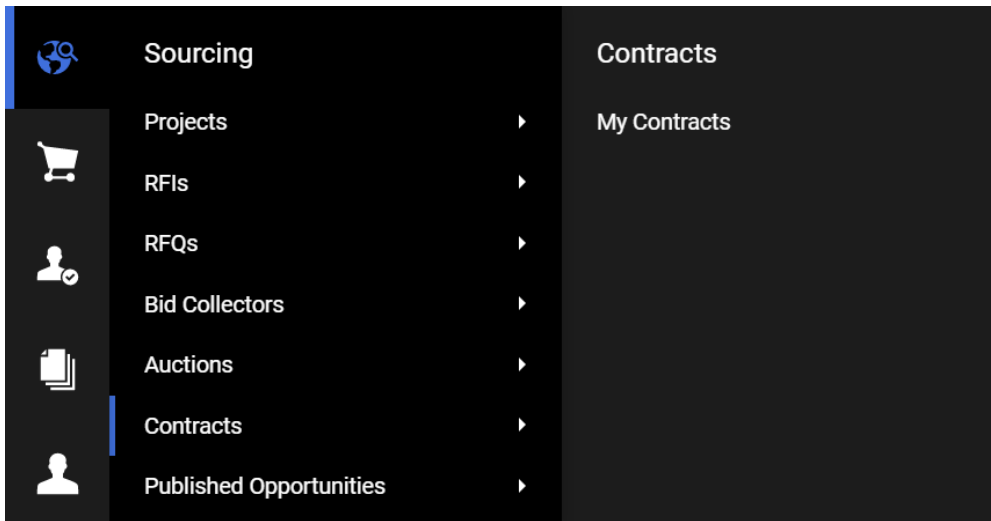
CONTRACTS

Contracts allow a buyer organization to formally record the awarding of business to registered suppliers, known as a **Main Contractor**. You can maintain a secure repository of awarded contracts for audit purposes, recording all important contract details and documentation.

General Information About Contracts

- Contracts can be created independently or from a pre-awarded/awarded RFQ/Auction. In that case, the contract may inherit the Main Contractor, Items, and Prices awarded on the RFQ/Auction.
- This module gives the Main Contractor the ability to negotiate contract terms, prices, and other information with the buyer organization via the application.
- Contract clauses can be used to create a Word Document to be used as **Master Contract Document (MCD)**. This can be shared with the Main Contractor either via the platform interface or converted into a file-based document.
- If the **Milestones** feature is active, the Contract Management module allows the contract manager to monitor and evaluate the main contractor against a set of milestones related to the specific contract.
- Contract management activities are supported by specific email alerts on each Contract, which may be configured to remind involved users and/or the main contractor about important events.
- If the **Contract Scorecard** feature is active on the platform, the module allows scorecards to be created specifically for a contract. These scorecards may be published to users in order to gather a detailed evaluation of the supplier performance on the contract.
- If the **Supplier Development Plan** feature is active on the platform, the module allows plans to be created specifically for a contract. Plans may be published to users in order to define a set of actions and activities aimed at improving and managing relationships with Main Contractor for the specific purposes of the contract.
- A secure **Messages** area allows the buyer users and the Main Contractor to communicate once the contract has been published (depending on platform configuration), activated, or placed under negotiation. Contract messages provide all parties with an automatic audit trail of communications during the contract lifecycle.

To view contracts you have access to (depending on your user rights), navigate to **Sourcing**  **> Contracts > My Contracts**. Click on a contract title from the list to view information about that contract.



Manage a Contract

Once a Contract is awarded to you, access the Contract and review the *Contract Settings* (**Sourcing**  **> Contracts > My Contracts > Select Contract > Settings Tab**). Contract information includes:


- Contract Code / Title
- Contract Type
- Start/Signature Date
- End/Delivery Date
- Currency
- Contract Manager
- Contract Status
- and more.

Prepare Additional Information Response

The Buyer Organization may create additional information form that includes questions related to the contract. This form contains questions editable by buyer and supplier. Some of the buyer editable questions might be for internal purposes, therefore, not visible to the supplier.

Step-by-Step

Follow the below steps to review and respond to additional information questions:

1. Navigate to **Sourcing**  > **Contracts** > **My Contracts**.
2. Select the contract and navigate to the **Content Management** tab.
3. Navigate to the **Additional Information** tab.
4. Click **Edit**, then respond to editable questions.
5. Click **Save**.


Note: You may see some questions and responses that are provided by the buyer specifically for this contract. These questions are only editable by buyer.

Manage Contract Prices

The Contract Manager can submit the Prices (Contract Price) to the Main Contractor to receive the acknowledgment/ acceptance or negotiate the Contract Price. Depending on the configuration, the Contract Manager may allow the Main Contractor to **Submit Counter Proposal**, so the Main Contractor can return the Price list to the Contract Manager in this case. Otherwise, the Main Contractor has only an option to accept/reject the Price list.


Step-by-Step

Follow the below steps to review and submit prices for a contract:

1. Navigate to **Sourcing**  > **Contracts** > **My Contracts**.
2. Select the contract and navigate to the **Content Management** tab.
3. Click the **Prices (Sent to Main Contractor)** tab.
4. You have two options: **Accept/Decline Proposal** or **Create Counter Proposal**.

Note: You will only see the Counter Proposal option if allowed by the Contract Manager.

ACCEPT OR DECLINE PRICES


- Access the Proposal/Price list submitted for your review:
 - i. Review the **Item List** section to check the items and prices.
 - ii. Once reviewed, click **Accept Proposal** to accept Prices.
 - iii. To reject the proposal, select **Decline Proposal** under the More  button.

CREATE COUNTER PROPOSAL


- Access the Proposal/Price list submitted for your review:
 - i. Once you have reviewed the **Item List** section and checked the items and prices, click **Create Counter Proposal**.

Note: This option allows you to modify the Contract Prices and submit it to the Main Contractor. You should then wait for the Contract Manager's approval on your submitted Counter Proposal.

- ii. Click **Edit**, update the **Unit Price** per item (if needed).
- iii. Click **Save**. The **Contract Total Price** is updated accordingly.

Note: To delete your proposal prior to submitting it to the Main Contractor, click the More  button and select **Delete Counter Proposal**.

- iv. Select **Send Counter Proposal** to submit your Counter Proposal. The updated Prices information is sent to the Contract Manager for his approval.


Note: You can export the Price list to an excel file (**Content Management > Prices >  button > Export Price List**). If you updated the Price list, you can use the **Export Price List Changes** option to extract the list to an excel file. Your updated prices are highlighted in yellow.

Manage Master Contract Document (MCD)

The Contract Manager can submit the Master Document (Contract Proposal) to the Main Contractor to receive the acknowledgment and acceptance on the MCD. Depending on the configuration, the Contract Manager may allow the Main Contractor to **Submit Counter Proposal**, so the Main Contractor can return the proposal to the Contract Manager in this case. Otherwise, the Main Contractor has only an option to accept/reject the proposal. Master Document can be submitted as a *File* or as a series of *Clause* (word document).




Step-by-Step

Follow the below steps to review and take action on Master Contract Document (MCD):

1. Navigate to **Sourcing**  **> Contracts > My Contracts**.
2. Select the contract and navigate to the **Content Management** tab.
3. Click the **Master Document (Sent to Main Contractor)** tab.
4. You have two options: **Accept/Decline Proposal** or **Upload Counter Proposal**.

Note: You will only see the Upload Counter Proposal option if allowed by the Contract Manager.


ACCEPT OR DECLINE PROPOSAL




1. If the Buyer uploaded the Proposal as a file:
 - a. Click the **File** uploaded under the **Last Proposed Master Document** area.
 - b. Once the Proposal reviewed, click **Accept/Decline Proposal**. You have an option to insert your comment in the **Comment** box.
 - c. Once you inserted your comment, click **Accept** to accept the Proposal, **Decline** to reject the Proposal and **Cancel** to return to the previous page.
2. If the Main Contractor submitted a Proposal using clauses, click **View Document** to access the proposal:
 - a. You have an option to *Print*  and *Download*  the Proposal. **Download** option will download the Proposal in the "PDF" format.
 - b. If you wish to *Download* the Proposal in the "Word" format, click the More  button, then click **Export Master Document** to export the Master Document in a readable format. **Note:** This format is not used to edit the content for a counter proposal.
 - c. Click **Back** to return to the previous page.
 - d. Once the Proposal reviewed, click **Accept/Decline Proposal**. You have an option to insert your comment in the **Comment** box.
 - e. Once you inserted your comment, click **Accept** to accept the Proposal, **Decline** to reject the Proposal and **Cancel** to return to the previous page.

UPLOAD COUNTER PROPOSAL

1. If the Buyer uploaded the Proposal as a file:
 - a. Click the **File** uploaded under the **Last Proposed Master Document** area.
 - b. Once reviewed, click **Upload Counter Proposal**.

Note: This option allows you to modify the Contract Proposal and submit it to the Main Contractor. You should then wait for the Contract Manager's approval on your submitted Counter Proposal.


- c. Click **Select a File to Upload**, upload your file and click **Confirm**.
 - d. Click **Save**.
 - e. Select **Send Counter Proposal** to submit your Counter Proposal, **Replace Counter Proposal** to change the Proposal you uploaded.
 - f. You can cancel the Counter Proposal by selecting **Cancel Counter Proposal** option under the More  button. If selected, you will receive a confirmation message, Press **OK** to proceed.
 - g. If you select the **Send Counter Proposal** option, you have an option to insert your comment in the **Comment** box.
 - h. Insert your comment and click **Send Counter Proposal**.
 2. If the Main Contractor submitted a Proposal using clauses, click **View Document** to access the proposal:

- a. You have an option to *Print*  and *Download*  the Proposal.
 - b. If you wish to *Download* the Proposal in the "Word" format, click the More  button, then click **Export Master Document**.
 - c. To submit your Counter Proposal, click **Create Counter Proposal**.



- d. Select **Edit MCD Content** from the More  button. Click **Open Word** to view the MCD content in the Word file. **Edit** the required sections and **Close** the file.



- e. Select **Save** by clicking the disk icon within the Word file to confirm your changes. The MCD will be saved back into the system and the content will be updated. You will be requested to click **Save** through the pop-up message.

- f. Alternatively, you can click select **Export MCD Content** from the More  button. The content can then be edited or shared for editing. Click **Import MCD Content** to upload the changes back into the system.

Note: You should not change the clause tags that display in the right side of the document as this will cause an error when saving the changes back into the system.


- g. To cancel the changes, select **Cancel Counter Proposal** from the More  button on the top right of the screen.
- h. Select **Highlight Changes** if you wish to review your updates.
- i. Click **Back** button in the top left of the screen to be taken back to the Master Document page.
- j. You have an option to cancel the Counter Proposal by selecting **Cancel Counter Proposal** option under the More  button. If selected, you will receive a confirmation message, Press **OK** to proceed.
- k. Otherwise, click **Send Counter Proposal** to submit your Counter proposal. you have an option to insert your comment in the **Comment** box.
- l. Insert your comment and click **Send Counter Proposal**.

Contract Messages

When the messaging feature is activated, suppliers can contact the buyer through the Messages area within the Contract with any questions related to the event.

Create and Send Message to Buyer

Step-by-Step

1. Navigate to **Sourcing**  > **Contracts** > **My Contracts**. Click on a contract title from the list to view information about that contract.
2. Navigate to the **Messages** tab, then click **Create Message**. A page for creating the new message opens.
3. Select a **Message Classification**. Classify the message if the buyer organization has categories configured.
4. Enter a **Subject**.
5. Enter the **Message**.
6. Optionally, add an attachment to support your message.
7. Click **Send Message**.

Under the Messages tab, a **Sent Messages** area is displayed. From this page, you can keep track of sent messages, see if they were read by the buyer, and see the message replies.

Reply to Buyer Message

Step-by-Step

1. Navigate to the Contract.
2. Under the **Messages** tab, navigate to the **Received Messages** page.
3. Click **Reply** to compose your message to the buyer.
4. Click **Send Message** to send your reply.

SUPPLIER MANAGEMENT

CATEGORIES

If enabled, categories are used to classify your organization against a Category Tree to indicate the categories of supply (product or service) your organization provides. The Buyer may allow the category tree to be displayed during the onboarding process, or after activation. Suppliers can add classifications at the leaf (lowest) level of the Category Tree.

It is important to classify your organization in the most relevant categories and in as many categories as possible, to ensure that you get all related opportunity listing alerts. For example, opportunity listings are used by the buying organizations to advertise future public sourcing events for specific categories of supply.


Your classifications may also be used as the basis for formal supplier category assessments.

Buyers may associate Forms with categories. The **My Categories** page lists all of your categories and associated forms, their completion status, and assessment status (if the category is set-up for formal qualification).

Search and Select Categories

Step-by-Step

Depending on the buyer organization, Category Tree classification may be completed during or after the registration process.

1. Navigate to **My Organization**  > **My Categories**.
2. Click **Add Category** to view the category tree. Each category may have levels of subcategories. You can use the Display Selected Only, Expand All, and Collapse All buttons to control the display of subcategories in the tree.
3. To search for categories, use the **Free Text Search** feature by entering a keyword or category code, then click **Search**. The tree refreshes and displays the matching categories.
4. Select the appropriate **category or categories** (at leaf level).
5. Click **Confirm Current Selection**. The selected categories are saved to your list of categories and you are returned to the My Categories page.

Complete Category Specific Forms

Buyer organizations can associate forms to specific categories in the category tree. As you make category selections, you may be navigated to a page to complete the associated category form.

Enter responses for the available fields. Mandatory fields are marked with a red asterisk. Click Save to save your responses and return to My Categories.

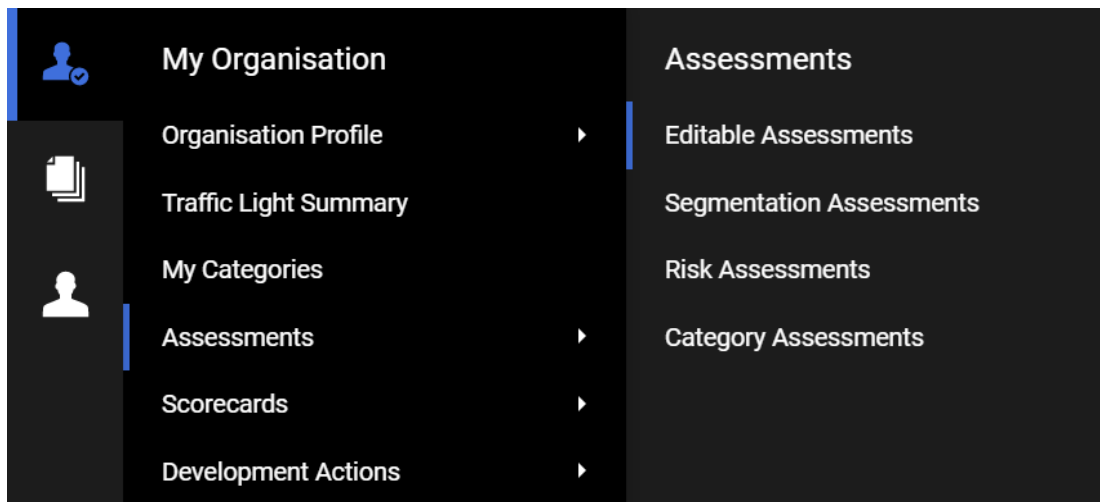
ASSESSMENTS

To view the Assessments area, navigate to **My Organization**  > **Assessments**, then select the type of assessments you want to view.

The Assessments area contains access to the following pages:

- **Editable Assessments** - Contains a list of editable assessments.
- **Segmentation Assessments** - Contains a list of segmentation assessments.
- **Qualification Assessments** - Contains a list of qualification assessments.
- **Risk Assessments** - Contains a list of risk assessments.
- **Category Assessments** - Contains a list of category assessments.


Note: Buyers control supplier visibility of assessment details. Therefore, suppliers may or may not be able to view assessment details from various buyers.



Manage Assessments

Edit Assessments


Step-by-Step

1. Navigate to **My Organization**  > **Assessments** > **Editable Assessments**. The page opens with a list of editable assessments and their completion percentages.
2. Select the **Assessment** to edit by clicking on its name.

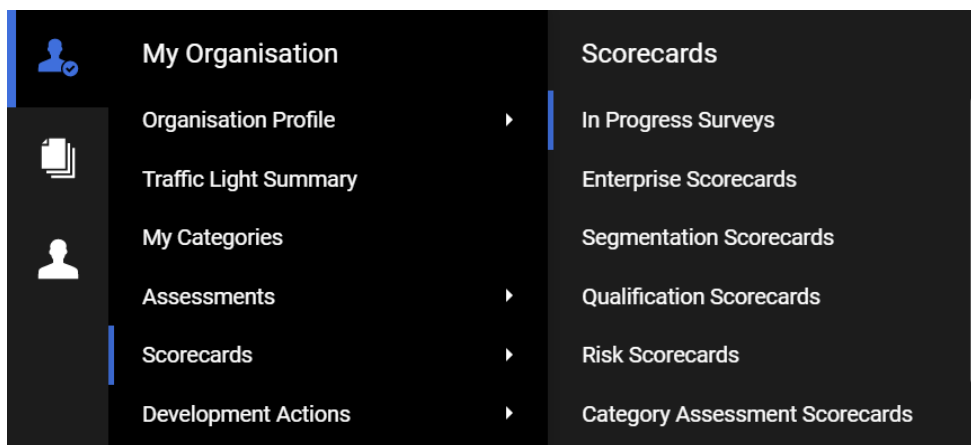
3. Click the **Edit** button. The form switches to editable mode.
4. Enter responses to the fields on the form.
5. Click **Save and Continue**. The form is saved and you are prompted to return the forms to the buyer or do it later.

Once a form is returned to the buyer, it is no longer editable and will no longer appear on the Editable Assessments page.

SCORECARDS

To access the Scorecards area, navigate to **My Organization**  > **Scorecards** and select the type of scorecards you want to view. The Scorecards area contains access to the following pages:

- **In Progress Surveys** - This page displays surveys that the buyer has requested to be completed. The supplier super user may be requested to complete a supplier survey on a scorecard from a notification sent to their email address. They can access surveys through a link in the email notification or by logging into the application.
- **Enterprise Scorecards** - Enterprise scorecards are directly linked to a supplier profile. They are used to assess the supplier's performance in terms of their relationship with the entire buyer organization.
- **Segmentation, Qualification, Risk Scorecards** - These scorecards are used by buyers for **Universal Assessments**, such as associating a quantitative evaluation to a qualitative result of the assessment process.
- **Category Assessment Scorecards** - These scorecards are used for **Category Assessments** by buyers. These are typically used to associate a quantitative evaluation to a qualitative result of the assessment process.
- **Contract Scorecards** - Contract scorecards are used to evaluate supplier performance within the scope of an individual contract.



Respond to a Supplier Survey

The supplier super user may be requested to complete a supplier survey on a scorecard from a notification sent to their email address. They can access surveys through a link in the email notification or by logging into the application.


Step-by-Step

1. Access the supplier survey using one of these options:

Via Email

- a. In your email provider, find the email that contains "Enterprise Survey Response Required On: [organization platform]".
- b. Click on the [link](#) at the bottom of the email. Enter your supplier user login credentials and click on the **Submit** button. You are taken to the Supplier Survey page in the application. A list of questions that have been made available to the supplier are displayed.

From the Application

- a. Enter your supplier user login credentials and click **Submit** button to open the application.
 - b. Navigate to **My Organization**  > **Scorecards** > **In Progress Surveys**.
 - c. Open the **Scorecard** with the survey you want to complete. You'll be taken to the **Survey Form**.
2. On the Survey Form, enter a value in the open **Response** field for each KPI.
 3. (optional) If you want to send a message to the buyer, click the **Access Scorecard Messages Area** link, then create and send a message.
 4. Choose one of these options:
 - Click **Save** to save your responses and return to the survey later.
 - Click the **Save and Complete Survey** button to complete the survey, then click **OK** in the pop-up window.

Receive and Send Messages as Supplier

A supplier's main contact will receive an email when a message is sent to the supplier from a scorecard. They can use a link in the email to open the email and reply to it from the application. The reply is displayed on the Messages tab on the scorecard.

Step-by-Step


1. In your email provider, find the email that contains "New Message for [name] Scorecard on: [organization platform]".

Note: Only the Subject of the message is visible in this email. You will not be able to read the message itself until you sign into your supplier user account and access it within the platform. The scorecard must be visible to the supplier.

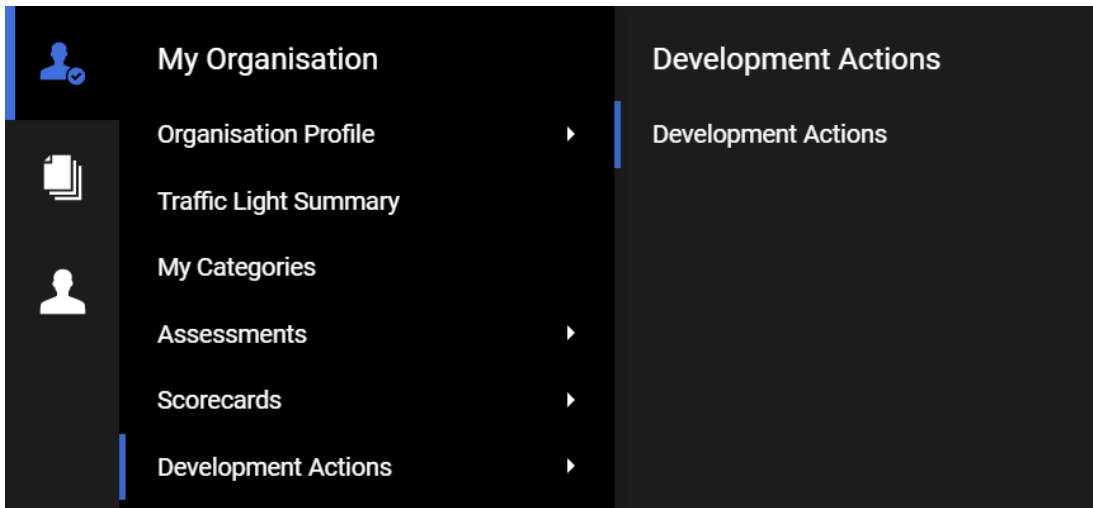
2. Click on the **link** at the bottom of the email.
3. Enter your Login Credentials and click the **Submit** button. You can now see the body of the email message.
4. View the range of actions available to you within the Messages toolbar:
 - **Back** - Return to the Received Messages list.
 - **Reply** - Reply to this message using the secure online messaging system.
 - **Forward** - Forward this message to an email address outside the platform. This feature is dependent on your platform's configuration.
 - **Print** - Print the contents of the current page.
5. Click **Reply** to begin drafting your response to the message. You will now be in the Create Message page and the Subject line is already filled in, similar to a standard email. The message from the buyer is also displayed.
6. Enter the **comment** you want to send in the **My Message** field.
7. Click **Send Message**.

DEVELOPMENT ACTIONS

Organizations may utilize a Supplier Development Plan after evaluating the supplier performance and identifying the areas of growth / improvement. Based on the supplier performance, a plan will be designed with a specific set of actions for the supplier to complete in order to achieve the objective of the plan.

To access the list of development plan actions visible to you, navigate to **My Organization**  > **Development Actions**. You will be able to see different columns available in the Development Actions tab, such as:


- Action Name
- Action Status
- Action Start / End Date
- Plan Type
- Plan Status
- Collaboration Status



Add Action to Plan

The supplier can add Actions to a development plan only if this permission is allowed in the associated plan.

Step-by-Step

1. Navigate to **My Organization**  > **Development Actions**.
2. Click the "**Add Action to Plan**" button. **Note:** It is not possible to create an Action as there are no available Running Plans.
3. Complete the details (Action Name, Action Scope, Plan, Expected Duration).
4. Once the Action details are completed, click the **Save** button.

Respond to an Action Collaboration Form

The supplier super user (main user) or a user who is invited as a collaborator (invited as action collaborator), may be requested to complete an action collaboration form on a development plan from a notification sent to their email address. They can access surveys through a link in the email notification, dashboard or by logging into the application.


Step-by-Step

1. Access the Action Collaboration form using one of these options:


Via Email

- a. In your email provider, find the email that contains "Collaboration Opened for Action [name] On: [organization platform]".
- b. Click on the **link** at the bottom of the email. Enter your supplier user login credentials and click on the **Submit** button. You are taken to the **Collaboration Area** page in the application. A list of questions that have been made available to the supplier are displayed.

From the Dashboard

- a. Enter your supplier user login credentials and click **Submit** button to open the application.
- b. Navigate to **Dashboard**  > **Received Action Collaborations**.
- c. Click the **Action Name**.

From the Application

- a. Enter your supplier user login credentials and click **Submit** button to open the application.
 - b. Navigate to **My Organization**  > **Development Actions**.
 - c. Select the **Action Title** with the collaboration status **Open to Supplier**.
2. On the Collaboration Area, access the "Collaboration Form".
 3. Click the **Edit Values** link, respond to questions then click the **Save** button.
 4. Once you completed and saved the form, click the **Complete Collaboration** button (located on top of the page) then confirm the completion.

Receive and Send Messages as Supplier

A supplier's main contact will receive an email when a message is sent to the supplier from an action plan. They can use a link in the email to open the email and reply to it from the application. The reply is displayed on the Messages tab on the action plan.

Step-by-Step

1. In your email provider, find the email that contains "New Message Received for Action [name] on: [organization platform]".


Note: Only the Subject of the message is visible in this email. You will not be able to read the message itself until you sign into your supplier user account and access it within the platform. The action must be visible to the supplier.

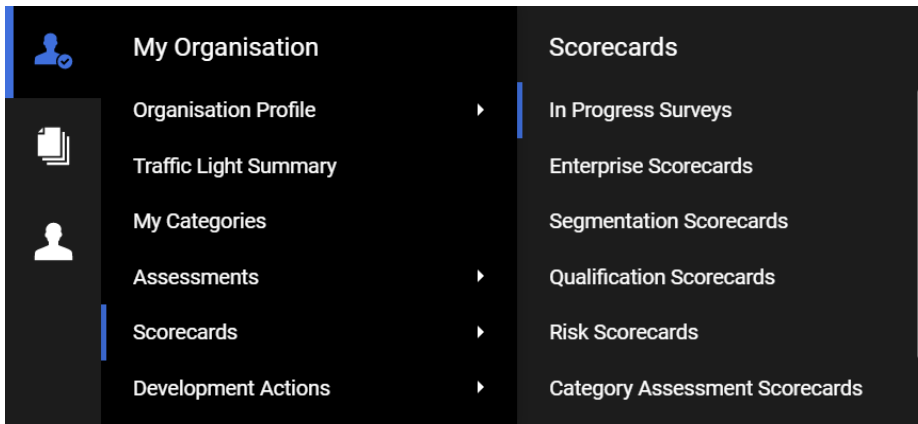
2. Click on the **link** at the bottom of the email.
3. Enter your Login Credentials and click the **Submit** button. You will be directed to the Collaboration Area tab.
4. Navigate to "**Messages**" tab > **Received Messages** > **Access the Message**. You can now see the body of the email message.
5. View the range of actions available to you within the Messages toolbar:
 - **Back** - Return to the Received Messages list.
 - **Reply** - Reply to this message using the secure online messaging system.
 - **Print** - Print the contents of the current page.
6. Click **Reply** to begin drafting your response to the message. You will now be in the Create Message page and the Subject line is already filled in, similar to a standard email. The message from the buyer is also displayed.
7. Enter the **Comment** you want to send in the **My Message** field.
8. Click **Send Message**.

SUPPLIER TRAFFIC LIGHTS



With the **Supplier Traffic Lights** model, Buyer Organizations can define different dimensions (e.g. Code of Conduct, Financial Capabilities, etc.) that can be associated with multiple statuses to support the supplier evaluation process. Buyers control the visibility of the Supplier Traffic Light features to a supplier.

View Traffic Light Status

To access the Traffic Light area, navigate to **My Organization**  > **Traffic Light Summary**. **Note:** You can only view the Traffic Light Statuses that are visible to you.



Step-by-Step

1. Navigate to **My Organization**  > **Traffic Light Summary**.
2. You can view the visible **Dimensions** per buyer organization with the Traffic Light **Status** associated to each dimension.
3. To extract the **Traffic Light Summary** to an excel file, click the  button, then click the **Export List**.
4. You can open the Traffic Light Summary in excel format.