



## Supplier Handbook

Handbook for Supplier Users and Administrators

Product Version: 22.3

# Table of Contents

<b>Welcome</b> .....	<b>1</b>
Objectives .....	1
Key Points .....	1
<b>Introduction</b> .....	<b>2</b>
<b>Overview</b> .....	<b>2</b>
Supplier Home Page .....	2
Navigation Menu .....	2
Supplier Identity Management and Access to All JAGGAER ONE Solutions .....	3
One-Time Password (OTP): .....	7
<b>Permissions (User Rights)</b> .....	<b>7</b>
RFx .....	8
Bid Collectors .....	8
Auctions .....	8
Contract Management .....	9
Supplier Management .....	9
Supplier Performance .....	9
Development Actions .....	9
User Management .....	9
File Sharing .....	9
<b>Registration &amp; Onboarding</b> .....	<b>10</b>
Register as a Supplier (Self-Registration) .....	10
Profile Form .....	10
Complete Profile Information .....	11
Login to Application .....	11
Complete Profile Data .....	12

Forgot Your Password? .....	12
Forgot Your Username? .....	13
<b>Dashboard Widgets .....</b>	<b>13</b>
Main Dashboard .....	13
JAGGAER ONE Dashboard .....	14
Navigation Between Main Dashboard & JAGGAER ONE Dashboard .....	22
<b>User Management .....</b>	<b>24</b>
<b>User Management Overview .....</b>	<b>24</b>
Create User Account .....	25
Edit User rights .....	25
Check User Status .....	26
Delete a User .....	26
<b>Create Roles and Divisions .....</b>	<b>27</b>
Create User Roles .....	27
Create Divisions .....	28
Default Users .....	28
<b>Sourcing Events .....</b>	<b>29</b>
<b>Opportunities .....</b>	<b>29</b>
Published Opportunities .....	29
Express Interest in Current Opportunity .....	29
<b>RFx .....</b>	<b>30</b>
Prepare and Submit RFx Response .....	31
Prepare RFx Response .....	31
Create Online Response .....	32
Create Offline Response .....	33
Submit Response .....	34

Modify Response .....	35
Delete Response .....	38
Withdraw Response .....	39
Manage Bidding Groups .....	39
RFx Messages .....	43
<b>Contracts .....</b>	<b>44</b>
Manage a Contract .....	45
Prepare Additional Information Response .....	46
Manage Contract Prices .....	46
Contract Messages .....	51
<b>Auctions .....</b>	<b>51</b>
Manage Auctions .....	53
Enter Pre-Bids .....	54
Launch Auction Monitor .....	55
Enter and Submit Bids .....	56
Bidding in a Single-Lot Auction .....	56
Bidding in a Multi-Item or Multi-Lot Auction .....	57
Bidding in Auctions with Bid Windows .....	58
Identifying Bidding Errors .....	60
Modify Bids that are Non-compliant with Minimum Bid Decrement .....	61
Bidding in a Lot-Based Dutch Auction .....	61
Bidding in a Quantity-Based Dutch Auction .....	62
Bidding in a Japanese Auction .....	63
Participating in a Ticker Auction .....	63
Email Reminders .....	66
Manage Auction Messages .....	66

Manage Final Bids .....	67
<b>Bid Collector .....</b>	<b>68</b>
Prepare Your Response .....	68
Submit Your Response .....	70
Revise Your Response .....	70
Decline to Respond .....	72
Concurrent Editing .....	73
Bid Collector Messages .....	73
<b>My Organization .....</b>	<b>75</b>
<b>View Organization Profile .....</b>	<b>75</b>
Organization Profile Tabs .....	75
<b>Select and Manage Categories .....</b>	<b>76</b>
Search and Select Categories .....	76
Complete Category Specific Forms .....	77
<b>View and Edit Assessments .....</b>	<b>78</b>
Manage Assessments .....	79
<b>Scorecards .....</b>	<b>79</b>
Respond to a Supplier Survey .....	80
Receive and Send Messages as Supplier .....	81
<b>Development Actions .....</b>	<b>82</b>
Add Action to Plan .....	83
Respond to an Action Collaboration Form .....	84
Receive and Send Messages as Supplier .....	85
<b>Traffic Light Summary .....</b>	<b>86</b>
View Traffic Light Status .....	86

<b>File Sharing</b> .....	<b>88</b>
File Sharing .....	88
View Shared Files .....	88

# 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.

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.

## Supplier Identity Management and Access to All JAGGAER ONE Solutions

JAGGAER ONE provides customers with solutions in Upstream and Downstream platforms. **Supplier Identity Management (IDM)** for supplier users is required in order to facilitate supplier's users browsing across all solutions using a unique set of easy-to-remember credentials (user's email address as username), based on customer configuration and registration processes.

The JAGGAER **Supplier Identity Management (IDM)** is an improved authentication and login experience for suppliers. The Supplier IDM provides supplier users with a single, global, and unique identity that ensures secure access across all JAGGAER ONE solutions. Benefits of the **Supplier IDM** include:

- Customers can utilize JAGGAER IDM as an identity provider for other third-party or proprietary systems (see the "[Extensibility Features of JAGGAER Supplier IDM](#)" for more details).
- Customers can utilize a third-party identity provider to authenticate suppliers to JAGGAER solutions (see the "[Extensibility Features of JAGGAER Supplier IDM](#)" for more details).
- Customers and suppliers will benefit from improved security, such as multi-factor authentication and password security.
- Credentials are unique and easier to remember (based on user's email address) and provide access to all JAGGAER modules and customers.
- Users can be deactivated once and access is permanently revoked.

When the **Supplier IDM** is activated for the customer, you will see a new login page to access the customer portal. Existing supplier users will be prompted to update login credentials in order to create a Global Identity. If a supplier has multiple email addresses, a notification will be sent to the supplier user advising them to update to a single email address. Once the email address to be used for authentication is specified, JAGGAER Supplier IDM will automatically create the new **Global Identity** for the supplier user based on that email address. New supplier users will create a Global Identity upon their first login.

**Note:** In case of new "Supplier Registration", the email address field accepts only a single email address.

## Extensibility Features of JAGGAER Supplier IDM

### Using JAGGAER Supplier IDM as an Identity Provider for other 3rd party systems & applications

Customers will be able to use JAGGAER Supplier IDM as an Identity Provider for other third-party or proprietary systems they are using (non-JAGGAER systems). This will provide suppliers with single-sign-on capabilities using a unique set of credentials across a broader range of systems and applications, which can include:

- JAGGAER solutions (and any associated integrations)
- Third party apps (owned or managed by the customer)
- PaaS external applications (custom applications developed by JAGGAER partners)

The following protocols are supported for the communication between JAGGAER Supplier IDM and any 3rd party system: **SAML 2.0** or **OIDC 1.0**. The customer is responsible for ensuring the supplier users are also provisioned (created) in any 3rd party systems for which SSO is needed. The provisioning of the supplier users in any non-JAGGAER system is outside the scope of this feature. **Note:** This feature can be activated on request by JAGGAER.

### Using 3rd party Identity Provider when authenticating Supplier users to JAGGAER





Many JAGGAER customers use their own Identity Provider (IDP) to manage user identification for suppliers, so the JAGGAER solutions (also referred to as "Service Provider" or SP in this context) must be able to accept the authorization token generated by the customer's IDP.

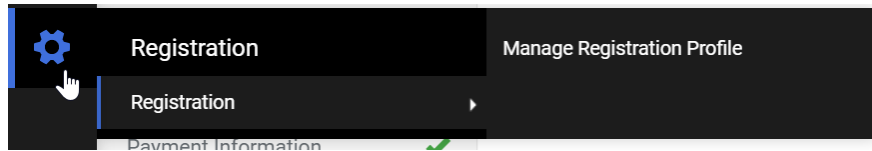
The following protocols are supported for the communication between JAGGAER's Supplier IDM and the customer's IDP: **SAML 2.0** or **OIDC 1.0**. Only Service Provider-initiated SSO is supported by Supplier IDM when SAML protocol is requested.

Supplier user provisioning is outside the scope of this feature. JAGGAER Supplier IDM can be configured to delegate the supplier user authentication to an external Identity Provider (customer-managed or customer-owned), but the users must already exist in the external IDP system, as well as in JAGGAER Supplier IDM. **Note:** This feature can be activated on request by JAGGAER, with support from the customer's side.

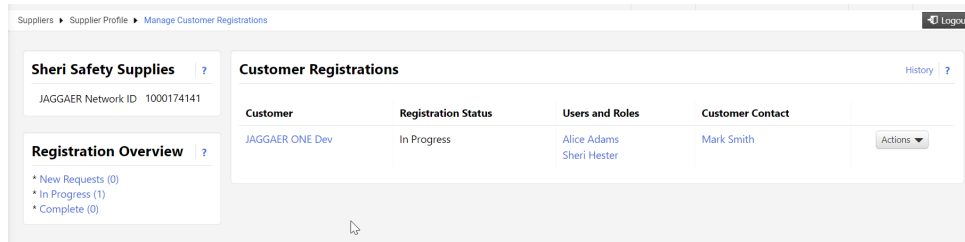
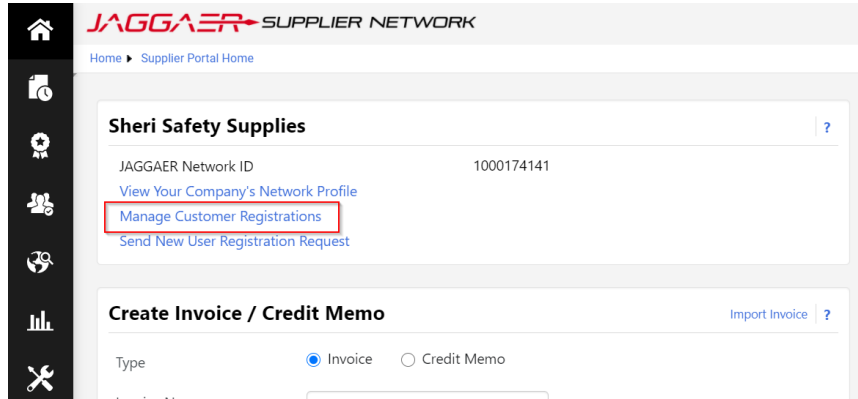
## Navigation Across JAGGAER ONE Solutions

Supplier users with access to all solutions can navigate as follows:

- To navigate **from Upstream to the Supplier Network**:
  - Select the **Contracts**  > **Contracts** - The user is navigated to the contracts search results page in the customer's branded portal.
  - Select **Procure to Pay**  > **Procurement** - The user is navigated to the sales order search results page in the customer's branded portal. Sales orders are created from buyer purchase orders.
  - Select **Procure to Pay**  > **Accounts Payable** - The user is navigated to the Sales Invoice search results page in the customer's branded portal.
- To navigate **from the Supplier Network to Upstream Customer**:
  - From the customer branded portal:
    - To navigate back to the Supplier Registration and Profile forms Upstream:
      - From the customer's branded portal, click **Registration**  > **Manage Registration Profile**. The user is navigated to the master supplier profile.



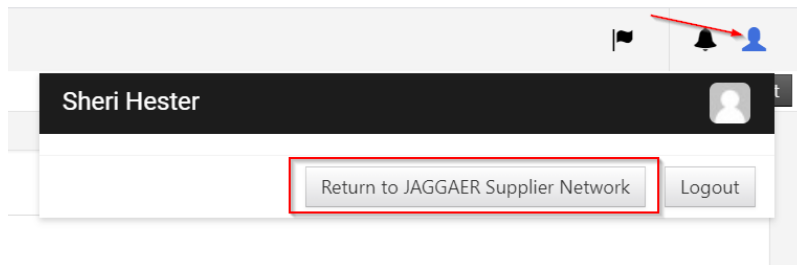
- From the Network Portal, select to navigate to the customer branded portal.
- Click **Manage Customer Registrations**, and then select the appropriate customer portal.



- Click **Registration** > **Manage Registration Profile**.

### Supplier Network Portal and Customer Branded Portal Actions

To navigate to the Supplier Network Portal, select your user icon in the top right, and click Return to **JAGGAER Supplier Network**.



### System Notifications:

When **JAGGAER Supplier IDM** is enabled, the following system generated notifications will be sent:

- After supplier registration, if an existing IDM account was found and linked to the newly registered account.
- After supplier registration, when a new IDM account is set up.
- When IDM password is changed (confirmation email).
- When users request to reset their password.
- When users are prompted to provide a new (more secure) password, once their IDM account is setup automatically (as upgrade from a legacy account).
- When creating an IDM account for the first time.
- When users change their email address associated with their IDM account.
- When a “One-Time-Password” (OTP) is sent (if multi-factor authentication was activated by JAGGAER).

## One-Time Password (OTP):

With the implementation of **JAGGAER Supplier IDM**, supplier users may be required to use multi-factor authentication. Suppliers have to enter a **One-Time Password (OTP)** in addition to their account password, when prompted by JAGGAER Supplier IDM. The **OTP** is only required if the user's active session has expired (because the user has logged out, the browser's cache has been cleared, or more than 10 days have passed since the last usage of JAGGAER solutions). The **OTP** will be sent to the user's email address associated with their JAGGAER Global Identity.

- Supplier users will receive a message upon login indicating that a **One Time Password (OTP)** will be sent to the email address as listed in the user profile.
- The email contains an **OTP** code that is valid for 10 minutes. Enter the OTP as prompted at login, and proceed.
- The **OTP** is valid for a specific device & browser combination for 10 days since the last usage of the JAGGAER solution, unless the browser cache is cleared after the last active session, or the supplier user logs out from the application.

## 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

# 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 profile forms) in order to access the platform and view sourcing events.

## Register as a Supplier (Self-Registration)

1. On the application *Login* page, click **New Registration**. 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 an asterisk (\*).
  - Ensure the email address is correct in order to receive the registration confirmation email. **Note:** Only one email address can be inserted as the "Primary Email Address" for receiving sensitive emails (i.e. password).
  - Additional email addresses (up to 5) can be added in the "Additional Email Addresses field".
  - If active, new "PEC" Email Address will be displayed in order to store this particular email type (up to 5).
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 (e.g. Assessments and Scorecard Survey processes) are saved back to your profile.

## Complete Profile Information


After registering, and depending on configuration, you may be directed to one or multiple onboarding pages (forms) to provide additional information related to your company.

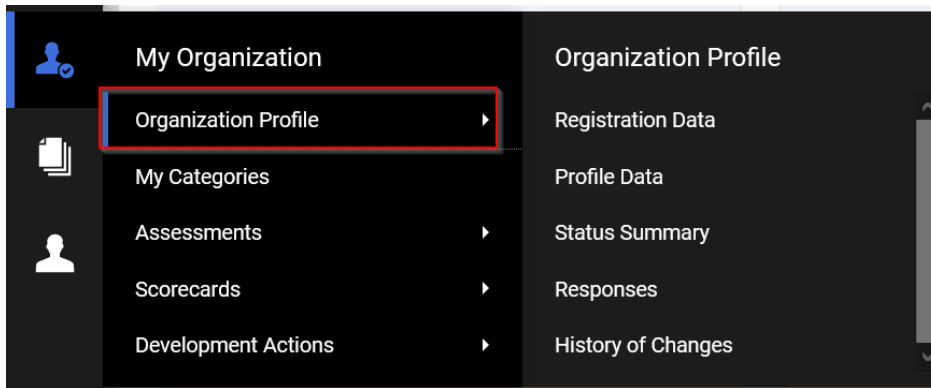
Complete the onboarding pages. You must complete this information to be considered for activation. You should update your profile as needed to ensure the most up-to-date information is available in the system. Once the onboarding page is complete, click **Save & Continue** to proceed with the remaining onboarding process.

Depending on the organization's configuration, you may be landed in the *Category Selection* page where you need to select your organization's business classifications. Once selected, click **Confirm**.

## Login to Application





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.

**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 Profile Data

Additional Profile Pages (Forms) might be available to you (if configured by organization) after you have successfully registered and logged into the platform.

1. Navigate to **My Organization**  > **Organization Profile** > **Profile Data**. Note the Completion status, indicating if the Page information has been completed:
  - Green icon  - all mandatory data element values are completed.
  - Red icon  - at least one missing mandatory data element value.
  - Empty - no mandatory values are embedded in the page.
  - You can view details about the page completion by selecting the **Show Completion** button. Click the **Hide Completion** button to collapse the detail columns
2. Click the **Title** to view the form content.
3. Click the pencil icon  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.

## Forgot Your Password?

1. Click on the **Forgot 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?

1. Click on the **Forgot Password** link (text may be different on your platform).
2. Click **Forgot Username**.
3. Enter your email address and validation value.
4. You will receive an email with a link to access your username.

## Dashboard Widgets

### Main Dashboard

Most organizations configure the application to display the **Main Dashboard** as a landing page for suppliers at login. If you see your "Home Page" as a landing page, click the **Dashboard** link at the top left of the page and navigate to **Main Dashboard** to access the dashboard.


The **Main Dashboard** displays a list of portlets, which summarize and give access to areas of related activities across JAGGAER Advantage (upstream) solutions. It reflects the solutions to which you have access. Portlets provide instant access to useful information and features.

The screenshot displays the 'Main Dashboard' interface with several widgets:

- SUPPLIER MANAGEMENT AND PERFORMANCE QUICK LINKS**: A list of links including Editable Assessments, Qualification Assessments, Enterprise Scorecards, Category Assessment Scorecards, and Development Actions.
- MY EDITABLE ASSESSMENTS**: A message box indicating 'No Assessments to display'.
- RFQ OPEN TO ALL SUPPLIERS**: A table with columns 'CURRENTLY OPEN' and 'NEXT CLOSING DATE'. It shows one RFI with 1 currently open and one RFQ with 0 currently open.
- NEW MESSAGES (LAST 30 DAYS)**: A message box indicating 'No Unread Messages'.
- MY RFIS WITH PENDING RESPONSES**: A table with columns 'TITLE', 'BUYER ORGANISATION', 'TIME TO CLOSE', 'CLOSING DATE', and 'RESP STAT'. It shows two entries: 'Test AN 100' with a time to close of 26:15:09 and 'TEST SRD' with a time to close of 41:15:09.
- OPEN AND PENDING AUCTIONS**: A message box indicating 'No Auctions to display'.

## Customize the Dashboard Layout

You can customize the dashboard by changing the layout of the page:

1. When on the **Main Dashboard**, click the **Settings** icon  at the top right of the dashboard to change the layout.
2. Select the desired column layout from "**Set Columns**" area and click **Save**:



- **Title** – State the current dashboard tab.
- **Set Columns** – Allows you to change the column layout in the dashboard by selecting one of the layouts (e.g. set the columns layout as 25% 75%, or 50% 50%).

## JAGGAER ONE Dashboard

Customers using JAGGAER ONE solutions can allow suppliers to access the JAGGAER ONE **Supplier Dashboard**. When enabled, the **Supplier Dashboard** functions as a supplier's default landing page, displaying widgets and tiles that aggregates the supplier's action items for a given customer. This intuitive dashboard is customer-branded, therefore, suppliers will access different dashboards for different customers by accessing the customer-specific URLs. The available features on the **Supplier Dashboard** depend on the user's permissions across JAGGAER ONE platforms, but may include:

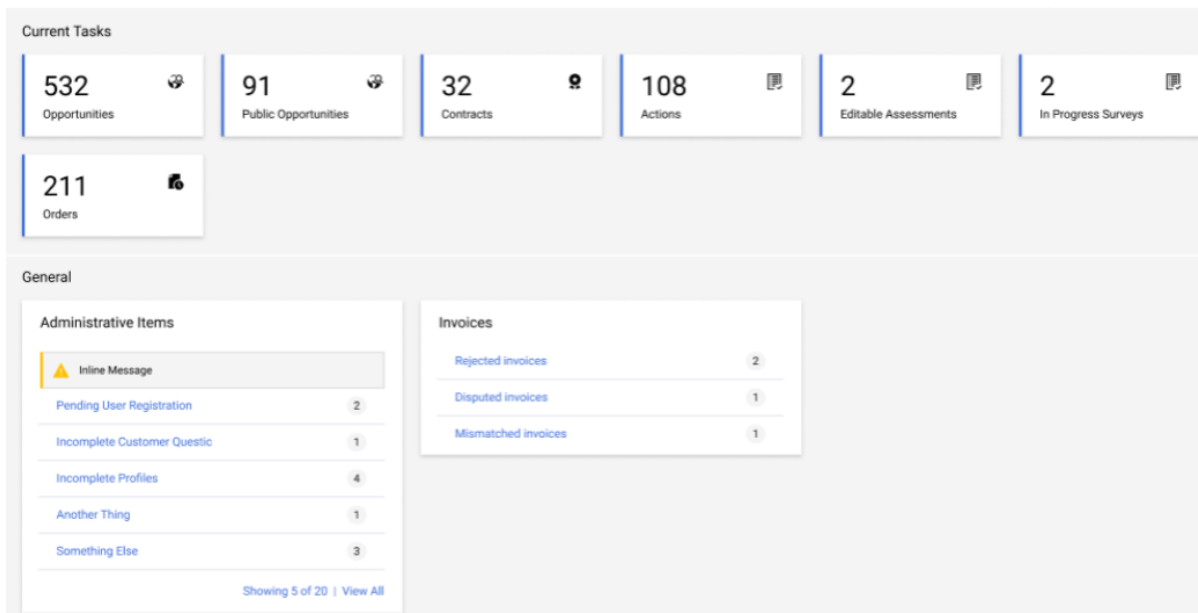
- Opportunities
- Public Opportunities
- Contracts
- Actions
- Editable Assessments

- In Progress Surveys
- Orders
- Invoices
- Administrative Tasks

Each of these areas is presented as a Tile on the Dashboard with relevant action items. The **Number** in the tile's content area represents the items that require an action/input from suppliers. When clicking on the tile, supplier users will be redirected to that specific area/solution.

**Note:** If enabled by the buyer organization, the new **Supplier Dashboard** will be the default landing page. However, suppliers can choose to instead view the "Main Dashboard" from the left menu navigation. The **Supplier Dashboard** does not replace the existing supplier portals, but provides a more intuitive summary across all portals that suppliers may have access to for a given customer.

When a supplier user logs in, a **Supplier Dashboard** will display by default (if enabled by the buyer organization).



The widgets available in the **Supplier Dashboard** are as follows (depending on the organization's configuration and supplier user's permissions):

**Opportunities:**

- The **Opportunities** widget represents the aggregated view of all the sourcing events across JAGGAER ONE solutions. When accessing the tile, the following columns are available in the **Overview** page:

- **EVENT TYPE** - Custom name defined by the buyer (i.e. RFQ, RFI, Auction, etc.)
- **EVENT ID** - Event number
- **NAME** - Event title displayed as a link
- **STATUS** - State of event
- **START DATE** - Event start date and time
- **END DATE** - Event end date and time
- **TIME LEFT** - Today's date minus deadline date

← Opportunities

Showing Results 1 – 25 of 250    Display 25 ▾    1 2 3 4 5 ... 10 →

EVENT TYPE	EVENT ID	NAME	STATUS	START DATE	END DATE	TIME LEFT ↓
RFQ	18032	<a href="#">Standard Parts - 2020</a>	New	31/12/2020 12:00	31/08/2021 23:00	23 Min.
RFQ	EDU-00566-RFQ	<a href="#">Laptops for Singapore Lab</a>	Open	01/01/2021 14:00	31/06/2021 12:00	30 Min.
RFQ	tender_1468507	<a href="#">Multi Lot approval Q Lot</a>	Running	15/01/2021 15:00	31/06/2021 15:00	1 Hour
RFQ	tender_1468544	<a href="#">Multi Lot approval Yellow Lot APRIL</a>	Running	16/01/2021 23:00	25/07/2021 12:00	2 Hours
RFQ	tender_1468544	<a href="#">Multi Lot approval Green Lot APRIL</a>	Running	20/01/2021 11:00	08/09/2021 20:00	4 Hours

### Public Opportunities:

- The **Public Opportunities** widget represents the aggregated view of the total number of **Public Opportunities** across JAGGAER Advantage (upstream) and JAGGAER Indirect (downstream) modules. When accessing the tile, the following columns are available in the **Overview** page:
  - **EVENT TYPE** - Custom name defined by the buyer
  - **EVENT ID** - Event number
  - **NAME** - Event title

- **STATUS** - State of event
- **START DATE** - Event start date and time
- **END DATE** - Event end date and time
- **TIME LEFT** - Today's date minus deadline date

← Public Opportunities 🔍

Showing Results 1 - 25 of 250 Display 25 ▾ 1 2 3 4 5 ... 10 →

EVENT TYPE	EVENT ID	NAME	STATUS	START DATE	END DATE	TIME LEFT ↓
RFQ	18032	<a href="#">Standard Parts - 2020</a>	New	31/12/2020 12:00	31/08/2021 23:00	23 Min.
RFQ	EDU-00566-RFQ	<a href="#">Laptops for Singapore Lab</a>	Open	01/01/2021 14:00	31/06/2021 12:00	30 Min.
RFQ	tender_1468507	<a href="#">Multi Lot approval Q Lot</a>	Running	15/01/2021 15:00	31/06/2021 15:00	1 Hour
RFQ	tender_1468544	<a href="#">Multi Lot approval Yellow Lot APRIL</a>	Running	16/01/2021 23:00	25/07/2021 12:00	2 Hours
RFQ	tender_1468544	<a href="#">Multi Lot approval Green Lot APRIL</a>	Running	20/01/2021 11:00	08/09/2021 20:00	4 Hours
RFQ	tender_1468544	<a href="#">Multi Lot approval Q Lot APRIL</a>	Running	28/01/2021 15:00	10/09/2021 12:00	5 Hours
RFQ	tender_13699	<a href="#">Entanglement 3 - Indi (Bidding Groups)</a>	Running	11/02/2021 09:00	10/09/2021 12:00	6 Hours
RFQ	tender_1468507	<a href="#">Multi Lot approval Yellow Lot</a>	Running	24/02/2021 12:00	15/09/2021 10:00	1 Day
RFQ	tender_1468507	<a href="#">Multi Lot approval Green Lot</a>	Running	28/02/2021 10:00	02/10/2021 18:00	2 Days
RFQ	PUR-00544-RAE	<a href="#">PRXWP Auction</a>	Running	01/03/2021 12:00	06/10/2021 18:00	3 Days
Auction	PUR-00544-RAE	<a href="#">Standard Parts - 2020</a>	New	31/12/2020 12:00	31/08/2021 23:00	3 Days 15 Hours
RFQ	EDU-00566-RFQ	<a href="#">Laptops for Singapore Lab</a>	Open	01/01/2021 14:00	31/06/2021 12:00	4 Days
RFQ	tender_1468507	<a href="#">Multi Lot approval Q Lot</a>	Running	15/01/2021 15:00	31/06/2021 15:00	5 Days

**Note:** Only suppliers users with permissions to **Public Opportunities** can view this tile in the dashboard.

**Contracts:**

- The **Contracts** widget represents the aggregated view of the **Contracts** across JAGGAER ONE solutions.
- When accessing the tile, the following tabs are available in the **Overview** page:
  - **In Negotiation** - displaying contracts where the main contract document or price list has been sent to the supplier for approval.
  - **Expired Recently** - displaying contracts where the end date occurred in less than 90 days.
  - **Expiring Soon** - displaying contracts where the end date will occur in less than 90 days. When the title is clicked, users will be redirected to the corresponding application.

← Contracts

In Negotiation 3   Expired recently 4   Expiring soon 5

Showing Results 1 – 25 of 250   Display 25 ▾

TYPE	NAME ↓	STATUS	START DATE	END DATE	EXPIRING IN	EXPIRED
NDA	<a href="#">NDA Sample</a>	Open	31/12/2020	31/08/2021	5 Days	-
Technical Specification	<a href="#">Excavator Track Specs</a>	Valid	01/01/2021	31/06/2021	7 Days	-
Master Supplier Agreement	<a href="#">MSA</a>	Active	20/01/2021	08/09/2021	21 Days	-

**Note:** Only suppliers users with permissions to JAGGAER ONE Contracts modules can view and access the **Contracts** tile.

#### Editable Assessments:

- The **Editable Assessments** widget represents a count of Assessments in the Supplier Management+ solution that contain forms that have been sent out to the supplier to gather or update information. Click on this tile to be redirected to the **Editable Assessments** page.

#### In Progress Surveys:

- The **In Progress Surveys** widget represents the view of total number of **In Progress Surveys** in the Supplier Management+ solution. Click on this tile to be redirected to the **In Progress Surveys** page.

#### Actions:



- The **Actions** widget represents the aggregated view of all action items that supplier users are required to complete for a buyer across JAGGAER Advantage (i.e. Development Plan actions) and JAGGAER Direct solutions (Supplier User actions).
- When accessing the tile, the following columns are available in the **Overview** page:
  - **NAME** - Action Name
  - **ASSIGNEE** - Name of the person who the Action is assigned to
  - **STATUS** - State of the Action
  - **START DATE** - Date that Action started
  - **END DATE** - Date that Action will end

← Actions

Showing Results 1 – 25 of 250    Display 25    1 2 3 4 5 ... 10 →

NAME ↓	ASSIGNEE	STATUS	START DATE	END DATE
<a href="#">Please refresh your Q Certificate</a>	Jacqueline Asong	Open	31/12/2020	31/08/2021
<a href="#">Review Certifications</a>	Sofia Alcocer	Open	01/01/2021	31/06/2021
<a href="#">Send me updated Supply World Offering</a>	Ohta Kin	Open	15/01/2021	31/06/2021
<a href="#">Please check certificate</a>	Trienke van Aartsen	Open	16/01/2021	25/07/2021
<a href="#">Check ToDo-List</a>	Chinelo Chyke	Running	20/01/2021	08/09/2021
<a href="#">Improve Account Management Capabilities</a>	Deveedaas Nandi	Running	28/01/2021	10/09/2021
<a href="#">Performance Review Meeting</a>	Jushawn McDowell	Running	20/01/2021	08/09/2021
<a href="#">Sign New MSA</a>	Sara Scholz	Open	24/02/2021	15/09/2021
<a href="#">Technical Requirements Approval</a>	Laquita Elliott	Open	28/02/2021	02/10/2021
<a href="#">Change Order State</a>	Benedita Tavares	Open	01/03/2021	06/10/2021
<a href="#">Reach Compliance</a>	Jaroslav Brabec	Running	31/12/2020	31/08/2021
<a href="#">Please check your recent Payment Term Change</a>	Karlien Nijhuis	Running	01/01/2021	31/06/2021
<a href="#">Please provide a plan to overcome risk gaps</a>	Izabella Tabakova	Running	15/01/2021	31/06/2021

## Orders:

- The **Orders** widget represents the total number of Orders in JAGGAER Indirect and JAGGAER Direct solutions.
- When accessing the tile, the following columns are available in the **Overview** page:
  - **ORDER NUMBER** - Order Number
  - **ORDER STATUS** - State of the Order
  - **SHIPMENT STATUS** - State of Shipment
  - **INVOICE STATUS** - State of Invoice
  - **CREATION DATE** - Order Creation Date
  - **TOTAL AMOUNT** - Total Cost of the Order
  - **CURRENCY** - Order Currency

ORDER NUMBER	ORDER STATUS	SHIPMENT STATUS	INVOICE STATUS	CREATION DATE	TOTAL AMOUNT	CURRENCY
P01	Fully Acknowledged	Fully Shipped	No Invoice	6/10/2022	250.00	USD
P010	Partially Acknowledged	Pending	No Invoice	6/10/2022	186.00	USD
P011	Pending	Pending	Partially Invoiced	6/15/2022	199.00	USD
P012	Pending	Pending	Partially Invoiced	6/15/2022	350.00	USD
P02	Pending	Pending	Partially Invoiced	6/10/2022	250.00	USD
P03	Partially Acknowledged	Partially Shipped	No Invoice	6/10/2022	250.00	USD
P04	Pending	Pending	Fully Invoiced	6/10/2022	250.00	USD
P05	Pending	Partially Shipped	No Invoice	6/10/2022	240.00	USD
P06	Pending	Pending	No Invoice	6/10/2022	375.00	USD
P07	Fully Acknowledged	Partially Shipped	Over Invoiced	6/10/2022	250.00	USD
P08	Fully Acknowledged	Pending	No Invoice	6/10/2022	240.00	USD

### **Administrative Items:**

- The **Administrative Items** widget represents the list of outstanding administrative items across JAGGAER ONE solutions.
- The list of **Administrative Items** will vary depending on the supplier's permission, but may include:

- Incomplete company registration
  - Update message responsibility roles
  - Supplier classification request
  - Missing category information
  - Incomplete supplier data
  - Renew expired certificates
  - Expired insurance documents
  - Expired certifications
  - Incomplete questionnaires
  - Pending user registrations
  - Incomplete company registration
  - Expired Diversity Certificates
- The count for each **Administrative Items** is displayed in the widget. Selecting the link will redirect supplier users to the respective solution area.

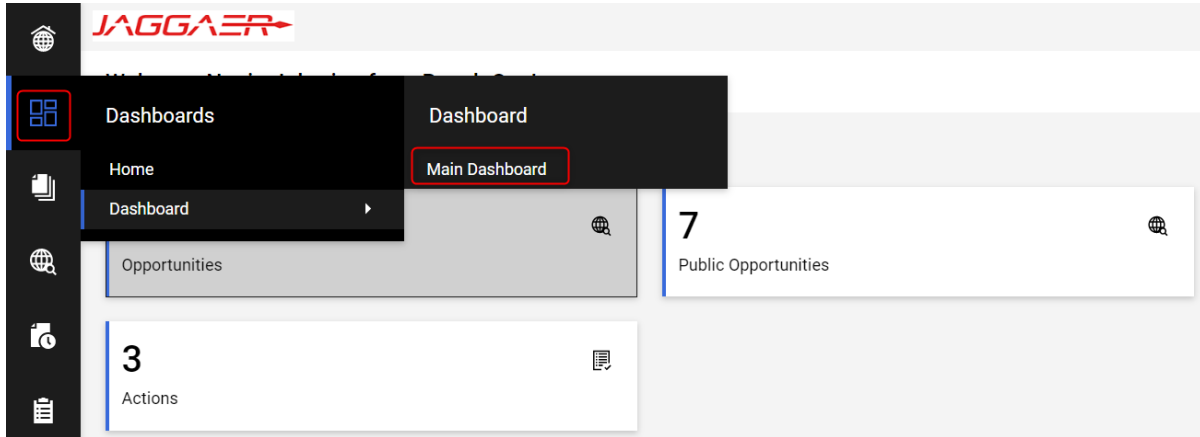
### **Invoices:**

- The **Invoices** widget lists invoices requiring action in the JAGGAER Invoicing solution.
- The **Invoices** widget contains the list of three types of invoices and their respective count:
  - Mismatched Invoices
  - Disputed Invoices
  - Canceled Invoices
- Clicking on any of the invoices will redirect supplier users to the corresponding invoice page.

# Navigation Between Main Dashboard & JAGGAER ONE Dashboard

## From JAGGAER ONE Dashboard to Main Dashboard:


Click the Dashboards icon  and navigate to **Dashboard > Main Dashboard**.

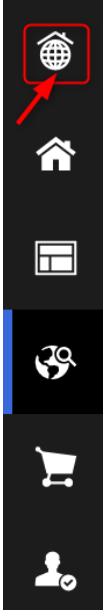


You can also access the following Dashboards, if enabled by the buyer organization.

- Customer Portal Home
- Supplier Portal Dashboard

## From Main Dashboard to JAGGAER ONE Dashboard:

To access the JAGGAER ONE Dashboard, click the **Launchpad** icon  on the left-side menu:



# User Management

## User Management Overview

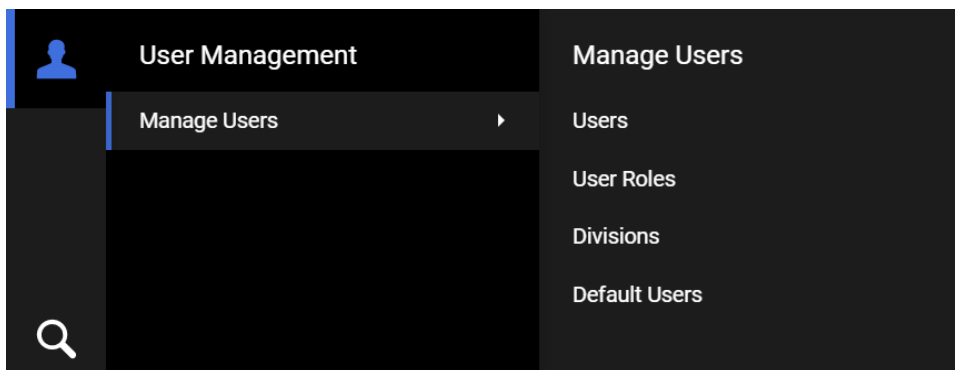
The Super User is the first user that registered on the platform and is responsible for managing other users. The User Management module is where the Super User manages individual user accounts, divisions, user roles, and organizational activity assignments.

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.


Click a link in the **Last Name** column to access the following pages for an individual user:

- **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.



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




## Create User Account

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.

**Note:** There is a default limit of 700 user accounts for a supplier organization. Please contact JAGGAER if your organization reaches this limit.

## Edit User rights


1. Navigate to **User Management**  > **Manage Users > Users**.
2. Click a link in the **Last Name** column to open the User Details page for that user.
3. Click the **User Rights** link under the Details tab.
4. Click the pencil icon  at the top of the page to switch the entire page to edit mode.  
Alternatively, click the pencil icon  in a specific section to turn on edit mode just for that section.

**Note:** Click an entry in the **Quick Navigation** box in the top-left of the screen to navigate directly to the user rights for that module.




5. Amend the user rights in each module by selecting the relevant options from the dropdown lists.
  - There are typically three levels of access you can select for each user right:
    - a. **No** (No access at all)
    - b. **Yes, if I'm associated to the Object** (Access is given to user within the individual Auction, RFx, and/or Contract)
    - c. **Yes** (Access is given to all events)
6. 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

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 either the **Active** or **Deactivated** option in the **Value** dropdown and click on **Search**.
5. The list of users will appear according to your search.

## Delete a User

1. Navigate to **User Management**  > **Manage Users > Users**.
2. Deactivated users are identified with  icon. Select the user that should be deleted:
  - If a user is not deactivated yet, access the user's profile then 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's *User Details* page.



3. Click the **⋮** icon and choose **Delete User** option.
4. Mark the checkbox and click **Confirm**. The deleted user will be removed from the system.


## Create Roles and Divisions

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. 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 User Roles

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.

**Note:** There is a default limit of 20 user roles for a supplier organization. Please contact JAGGAER if your organization reaches this limit.

## Create Divisions

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.

**Note:** There is a default limit of 20 divisions for a supplier organization. Please contact JAGGAER if your organization reaches this limit.

## 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

# Sourcing Events

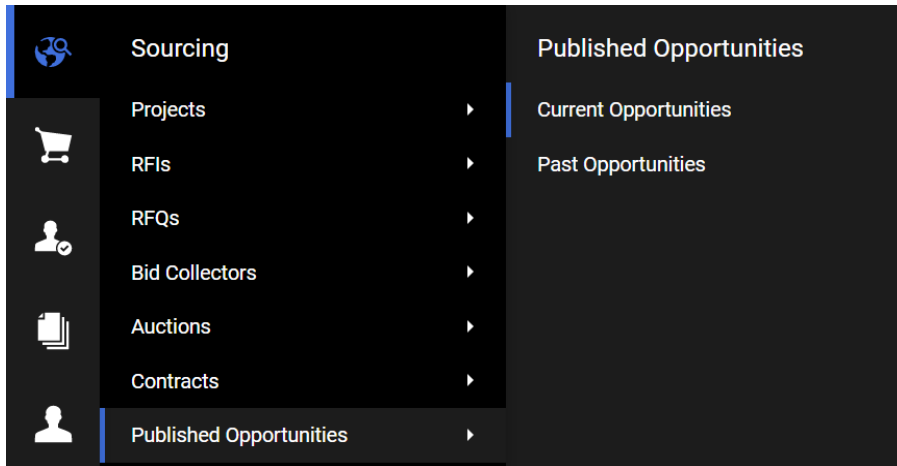
## Opportunities

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" on the next page 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 Current Opportunity

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 access icon  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**. You are redirected to the RFx's *Settings* page.
7. Navigate to **RFQ Details > My Response** and fill out your response form. See "RFx" below for more information.

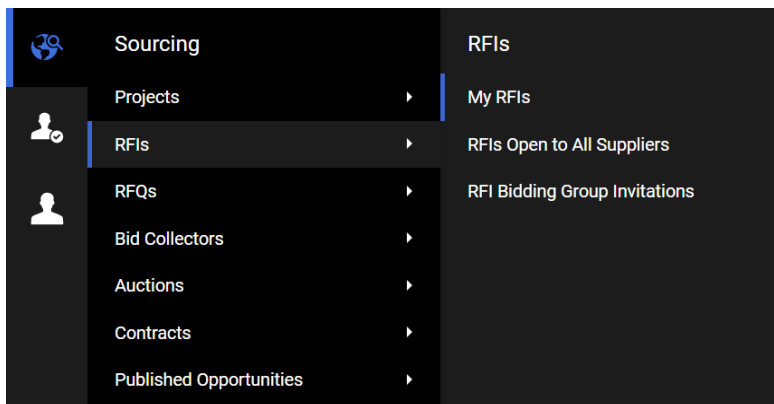
When accessing the list of Sourcing events (e.g. **Sourcing**  **> Published Opportunities > Current/Past Opportunities**), you can see the **Division** column to better identify the companies/divisions of the Buyer Organization in the negotiation events (including Opportunities, RFx, Contracts and Auctions). 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

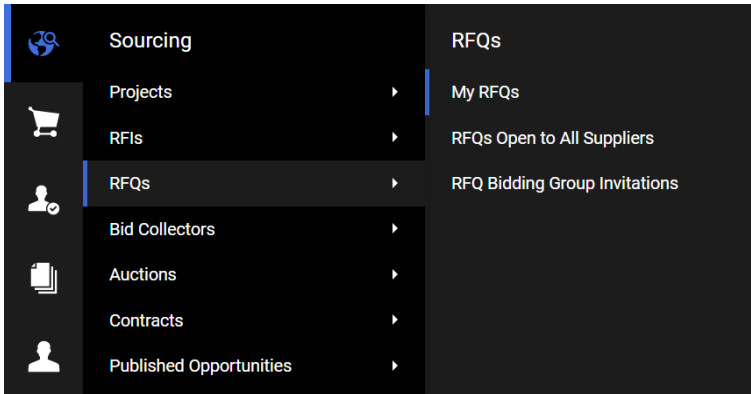
RFx is an umbrella term used to describe a buyer's request submitted to a group of suppliers as a set of questions in order to assess suppliers for an event or project. Supplier responses are sent only to the buyer; no information is shared between suppliers in the group.

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 cannot be awarded, but they can be finalized and converted into RFQs. **Note:** RFI may be referred to 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 referred to 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

**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** icon  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 **Intend to Respond** or to **Decline to Respond**.
  - Click **Intend to Respond** to begin the response creation process.
  - If you choose to decline, select a reason from the drop-down list and enter additional details in the comments box. Then, click the **Decline to Respond** button again.

## Create Online Response

1. Navigate to an RFx and click **Intend to Respond**.
2. If the RFx has been configured to allow Bidding Group responses, a pop-up will appear with options for responding for your organization only or as a bidding group. Select the appropriate choice and click **Save**.
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 the pencil icon  in a section to edit your response for that section. Some RFx have multiple sections while others have one.
5. Provide responses to the available questions. Mandatory questions are marked with an 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. Alternatively, click **Save and Return** to save and exit the current section and navigate back to the **My Response** page.

**Note:** If an RFQ is canceled after its closing date has passed, the **RFQ Status** will be moved to *Canceled*. Your **Response Status** remains unchanged and you retain read-only access to your responses in closed RFQ.

## Create Offline Response

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 **Intend to Respond**.
2. Click the **Online Questionnaire in Excel** button located on the My Response page.
3. Click the **Download Online Questionnaire in Excel** link (located above the file selector box) 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 the **Help To Create & Import Your Response in Excel** button for detailed instructions. A new browser window 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 **Upload** page.

6. Use the file **Browse** box to select your file, then click **Import Items** 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


If you have not submitted a response to an RFx, an alert message is displayed above the **My Response Summary** section of the **My Response** page. When your 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.

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**. A blue banner at the top of the My Response page indicates that you have successfully submitted your response. If errors are found, a red banner indicates that your response was not submitted and prompts you to correct the errors.


## Submitting Responses Containing Digital Signature Files

If an RFx requires one or more mandatory digital signature files, this information is contained in the alert message displayed in the grey box above the **My Response Summary** on the *My*

*Response* page. A signature icon  also appears in the **Response** column on the *My Response* page for attachments with a digital signature requirement. For these RFx, the **Submit Response** button is replaced with a **Confirm Response** button. When it is clicked, the confirmation message also contains a reminder that a signature document is required.

If your published response to an RFx is missing any mandatory signature files, the following changes occur in the UI:



- The **Response Status** in the My RFQs/My RFIs list is *Missing Signed PDF*. This status is also displayed in the My RFQs/My RFIs with Pending Responses widgets in the main dashboard.
  1. The *Missing Signed PDF* status appears in a yellow bar beside **Response Last Submitted On:** in the RFX header section located in the Details box in the collapsible left column.
  2. The alert message at the top of the RFX *Details* pages indicates that you must upload a signed PDF file.
  3. The **Confirm Response** button is replaced with an **Upload Signed PDF** button. The **Manage Signed Response Files** button is not displayed at the top of the *RFQ Details* pages.
  4. A warning  icon appears in the **My Response Summary** area beside each envelope that is missing a required digital signature. When relevant, an **Upload Signed PDF** button is available for each envelope.

**Note:** These messages and button are displayed only while an RFX is in a status in which suppliers can edit and submit their answers. The *Missing Signed PDF* status is always displayed if digital signature files are missing.

When all required digital signature files have been uploaded, the **Manage Signed Response Files** button is available at the top of the *RFQ Details* pages and the warning alerts disappear. The **Response Status** becomes *Submitted to Buyer* (if no other errors prevent submission of your response.)


## 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 the pencil icon within a section that will be edited. 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 a pencil icon  beside each section that is editable in your RFX response. Edit sections as necessary and click **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 a pencil icon  beside each section that is editable in your RFX response. Edit sections as necessary (if you decided to update your response) and click **Keep Changes** in each section 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 a pencil icon  beside each section that is editable in your RFX response. To provide a Best and Final Offer, update sections as necessary. Click **Keep Changes** in each section 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 take one of the following actions:
  1. **Edit Response to Match Total Price** - Click the pencil icon  to open the Commercial section in edit mode. Update the section to match the price requested by the buyer. Then, click **Keep Changes**.
    - An **Undo All Changes** button is available to set prices back to their original values. You can click the pencil icon  after clicking this button to reenter updated pricing.
    - Click **Submit Confirmed Price** to submit your updated offer.
    - 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. The message requests your confirmation, but does not block you from submitting the response.
    - When the TIOC response is submitted, the answer status becomes "Response Submitted to Buyer".
  2. **Decline** - When you decline a TIOC, a **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 the **Total Price** from the auction and the initial price from your RFx. The visibility of the **Confirmed Price** and **Instructions** depends on the configuration selected by the buyer.

- Click a pencil icon  to open the corresponding section in edit mode. Suppliers can edit only the sections and items that have been selected by the buyer.
  - Edit your response and click the **Keep Changes** button for applicable sections.  
**Note:** An **Undo All Changes** button is available to set prices back to their original values. You can click the pencil icon  after clicking this button to reenter pricing.
  - 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. The message requests your confirmation, but does not block you from submitting the response. Click **OK** to close this pop-up.
  - After you submit a response to an **Update Final Price**, the answer status changes to "Response Submitted to Buyer".
  - The pencil icon  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 an answer has not been submitted, you may delete your response at any time before an RFX's closing date and time. If an answer has been submitted, you may delete the responses only during the first round of a sealed RFX.

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

Once confirmed, your previous response will be deleted. You are returned to the **My Response** page, where you have the options to **Intend to Respond** 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 **Confirm** 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 **•••** drop-down menu at the top of the **RFx Details > My Response** page.

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

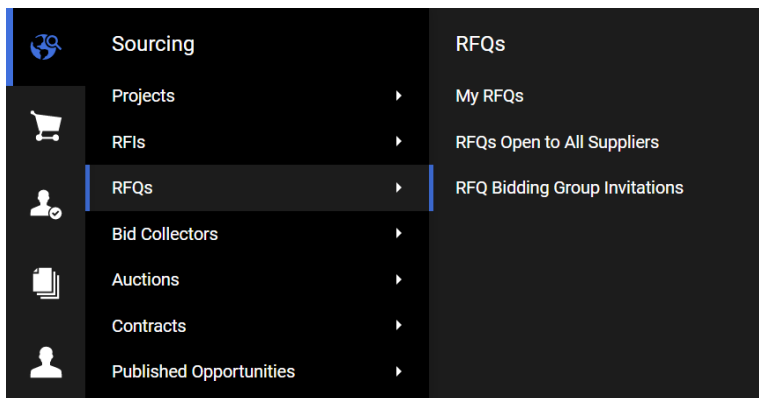
## Manage Bidding Groups

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.

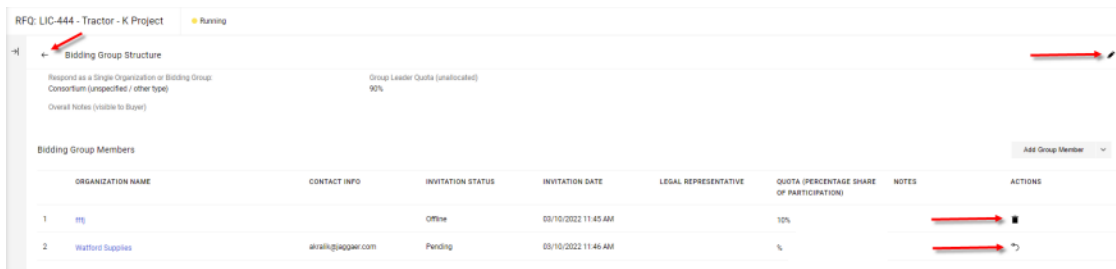


## Identifying the Bidding Group Type



- When you click **Intend to Respond** 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:
  - A **Bidding Group** section appears in the **My Response** page. A pencil icon  appears in this section. You should click this button to configure the Bidding Group.
  - After clicking the pencil icon , 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, pencil icon  will be available.

## Configuring the Bidding Group

- Bidding Group Leaders can perform the following actions when the **Bidding Group Structure** page is accessed:
  - Cancel** (back arrow ): Returns the user to the **RFQ Details > My Response** page.
  - Edit Group Structure** (pencil icon ): 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 for RFQ LIC-444 - Tractor - K Project. It includes a table of 'Bidding Group Members' with columns for Organization Name, Contact Info, Invitation Status, Invitation Date, Legal Representative, Quota, and Actions. Red arrows point to the back arrow, pencil icon, and trash/recall icons in the Actions column.

ORGANIZATION NAME	CONTACT INFO	INVITATION STATUS	INVITATION DATE	LEGAL REPRESENTATIVE	QUOTA (PERCENTAGE SHARE OF PARTICIPATION)	NOTES	ACTIONS
1 <a href="#">MTC</a>		Offline	03/10/2022 11:45 AM		10%		
2 <a href="#">Wattford Supplies</a>	wattfordsupplies.com	Pending	03/10/2022 11:46 AM		5%		

- 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.



## Responding as a Bidding Group Member

- Bidding group members that are assigned a **0%** value in the **Consortium Members Quota** field can belong to more than one bidding group in an RFX.
- If applicable, when responding as a Bidding Group, both the main contractor and bidding group members can respond to an RFX with two DGUE forms:
  - A form for their main role
  - A form for their auxiliary role

## 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

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

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

# Contracts

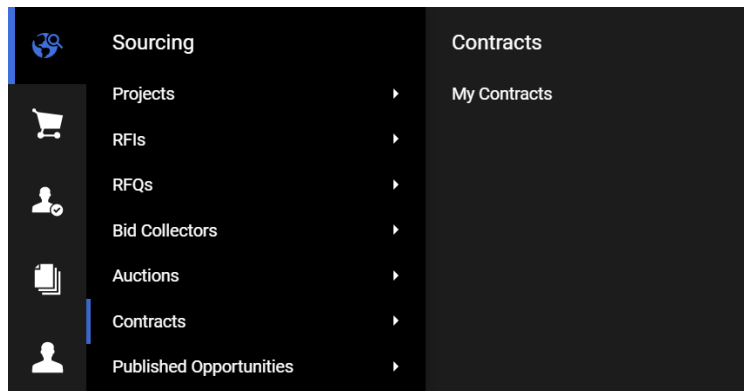
**Contracts** allow a buyer organization to formally record the awarding of business to registered suppliers, known as **Main Contractors**. You can maintain a secure repository of awarded contracts for audit purposes, recording all important contract details and documentation.

## 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 **Main 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 > Details Tab > Settings Sub-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 an 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.

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 **Contents Management** tab.
3. Navigate to the **Additional Information** sub-tab.
4. Click the  icon, then update the editable information.
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 the buyer. All editable fields include an **Editable By** descriptor to denote which user category may edit the field.

## 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.

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 > ⋮ icon > 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 Main Contract Document (MCD)




The Contract Manager can submit the Main 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. The Main Document can be submitted as a *File* or as a series of *Clause* (word document).

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

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

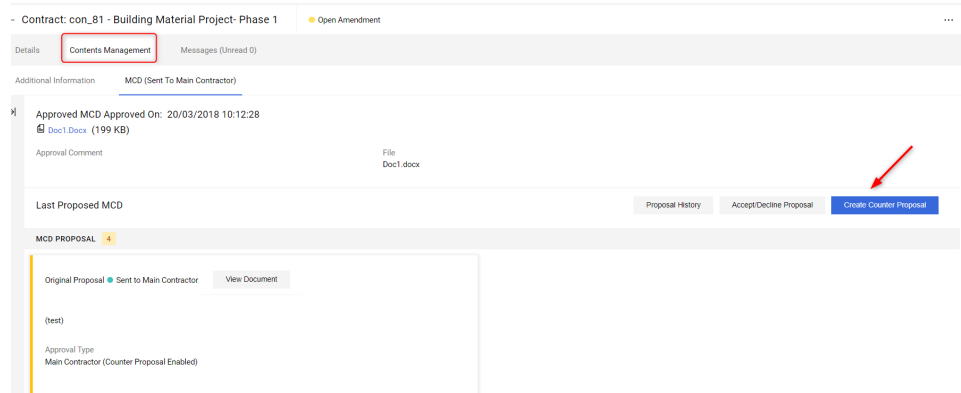
**Note:** You will only see the Upload Counter Proposal option if allowed by the Contract Manager.

## Accept or Decline Proposal



1. If the Buyer uploaded the Proposal as a file:
  - a. Click the **File** uploaded under the **Last Proposed Main 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 **...** icon, then click **Export Main Document** to export the Main Document in a readable format. **Note:** This format is not used to edit the content for a counter proposal.
  - c. Click  arrow 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

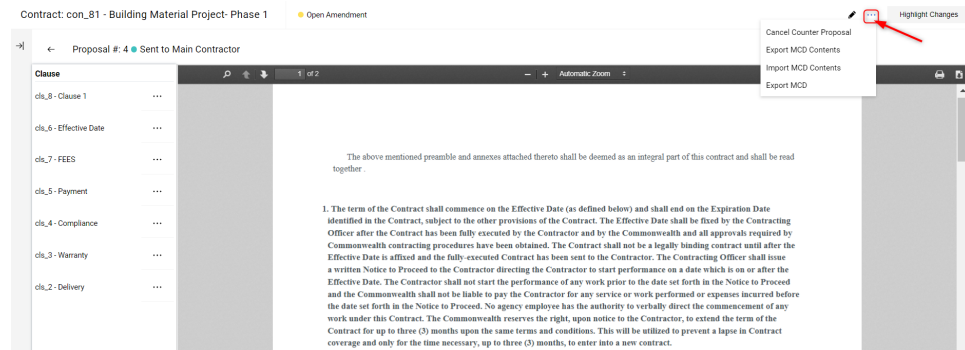
1. If the Buyer uploaded the Proposal as a file:
  - a. Click the **File** uploaded under the **Last Proposed Main Document** area.
  - b. Once reviewed, click **Upload Counter Proposal**.



**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 **...** icon. 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 **...** icon, then click **Export Main Document**.
    - c. To submit your Counter Proposal, click **Create Counter Proposal**.

- d. Select **Edit MCD Content** from the **⋮** icon. 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.

**Important 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 **⋮** icon on the top right of the screen.
- h. Select **Highlight Changes** if you wish to review your updates.
  - i. Click the **←** arrow in the top left of the screen to be taken back to the Main Document page.
  - j. You have an option to cancel the Counter Proposal by selecting **Cancel Counter Proposal** option under the **⋮** icon. 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

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 the **Create Message** sub-tab. A page for creating the new message opens.
3. Enter a **Subject**.
4. Enter the **Message**.
5. Optionally, add an attachment to support your message.
6. Click **Send Message**. To save the current message for later, click **Save As Draft**.

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

1. Navigate to the Contract.
2. Under the **Messages** tab, navigate to the **Received Messages** sub-tab.
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 Auctions

- **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 Auctions

- **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 Auctions

- **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.

## Ticker Auctions

- **Japanese Ticker** - These auctions are based on best price and they end when no supplier accepts the current round, which could result in a supplier bidding against itself. They are used to find a single winning supplier.
- **English Ticker** - These auctions are based on best supplier rather than best price and they end automatically when fewer than two suppliers remain in a round. As a result, it is not possible for suppliers to bid against themselves in these auctions.
- **English Ticker Shortlisting** - These auctions are used to create a short list of suppliers for subsequent negotiations. These auctions end when fewer than a predefined number of suppliers accept the current round.

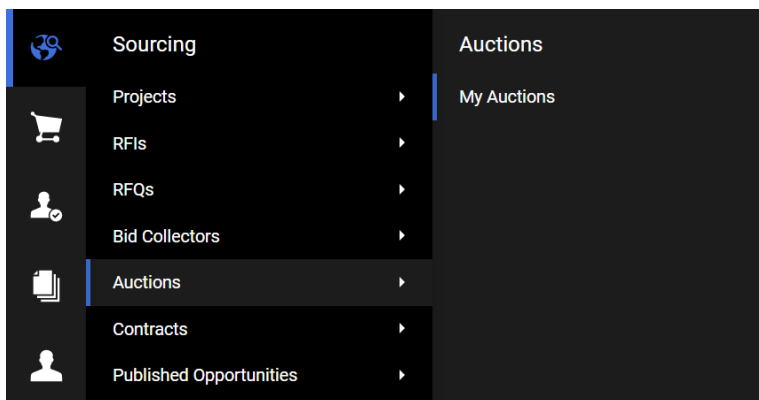
## Lot Auctions

- **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

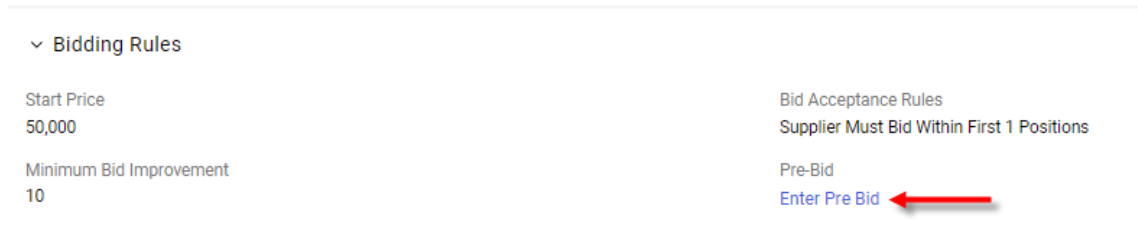
To view auctions, navigate to **Sourcing**  > **Auctions** > **My Auctions**. In the My Auctions area, you will see a list of auctions you've been invited to. The title, status, start time, end time, and Buyer Organization will be displayed for each auction.

**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.

## Enter Pre-Bids

If an auction with *Published* status is configured to allow suppliers to enter a pre-bid, and if pre-bids are not copied from an RFQ, you will see a warning message in a yellow bar at the top of the **Auction Details** page when you access the auction: *The Buyer requested you enter a Pre Bid before the Auction starts using the Pre Bid button in Settings.*

An **Enter Pre-Bid** button is located in the **Bidding Rules** section of the **Auction Details** page. Click this button to open a screen overlay in which a pre-bid can be entered and saved.








Pre-bid entry is affected by the auction format:

- **Multi-Item Auctions:** Pre-bids must be defined for each item. A row for each item is available on the overlay.
- **Multi-Lot Auctions:** Pre-bids must be defined for each lot. A row for each lot is available on the overlay.
- **Multi-Item Lots:** Pre-bids must be defined for each item. The **Enter Pre-Bid** buttons are located on the **Auction Details > Lot List** page.




Your pre-bid must comply with the auction rules configured by the buyer. You can enter, edit, and remove your pre-bid while an auction remains in *Published* status. When an auction moves to *To Start* status, your pre-bid becomes read-only.

# Launch Auction Monitor



1. Locate an auction on your *My Auctions* page and click the **Auction Monitor**  icon. From within an auction, click the **Auction Monitor** button in the top-right corner.
2. The **Auction Monitor** will load.

Status	Lot	Best Bid	Last Bid	Rank	Reserve Price
02:29:51	001 - Lot 1	900 CAD	900 CAD 	1	 CAD 900 900 <input type="button" value="SUBMIT"/>
02:34:51	002 - Lot 2	870 CAD	870 CAD 	1	 CAD 870 <input type="button" value="SUBMIT"/>


Lot	Best Bid	Last Bid	Rank	Reserve Price
001 - Lot 1	900 CAD	900 CAD 	1	 CAD 900 900 <input type="button" value="SUBMIT"/>
002 - Lot 2	870 CAD	870 CAD 	1	900 EUR CAD 870 <input type="button" value="SUBMIT"/>

Code	Best Bid	Last Bid	Rank	Reserve Price
dn_sender_1468569_37	900 EUR	900 EUR 	1	 EUR 900 <input type="button" value="SUBMIT"/>

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

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.
  - **Note:** If the Auction is configured as a **Formula Auction**, impacted columns are recalculated and refreshed when a value that is part of the formula (such as Unit Price, Discount, etc.) is changed.
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.

**Note:** If two or more suppliers enter the same bid value, the bids are ranked according to the time they were entered (The earliest of the bids is ranked #1, the second is ranked #2, etc.). As a result, if the best bid is duplicated, the earliest entry wins.



## Bidding in a Single-Lot Auction

1. Enter a bid for the item in the bid box located on the right side of the screen.
2. Click **Submit**.
3. Click **Confirm**.

**Note:** The **Best Bid**, your own **Last Bid**, and if configured, your **Rank** may be displayed at the top of the Auction Monitor. The **My Bid** sub-tab lists all of your own bids.

## Bidding in a Multi-Item or Multi-Lot Auction

In a multi-lot auction, the lots to which you have access are available for bidding.

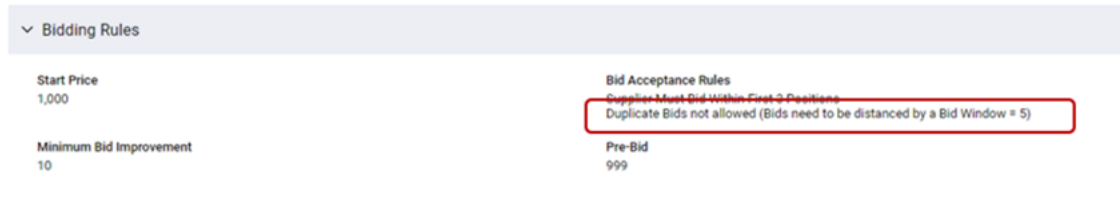
1. Click the arrow icon  to access the item list and bidding boxes for an auction lot. **Note:** The arrow icon is a toggle. When the list is expanded, click  to collapse the list.
2. Enter your bid amount for each lot. Remember to bid the unit price of each item in the lot, not the total price of the lot. The platform calculates the **Total Bid Amount** based on the unit prices that you entered and displays it near the **Submit** button.
3. Verify the **Total Bid Amount**, then click **Submit**.
4. Click **Confirm** to confirm your bid for the lot.
5. Repeat the steps above for each lot in the auction.

**Note:** The **Best Bid**, your own **Last Bid**, and if configured, your **Rank** may be displayed at the top of the Auction Monitor. The **My Bid** sub-tab lists all of your own bids.

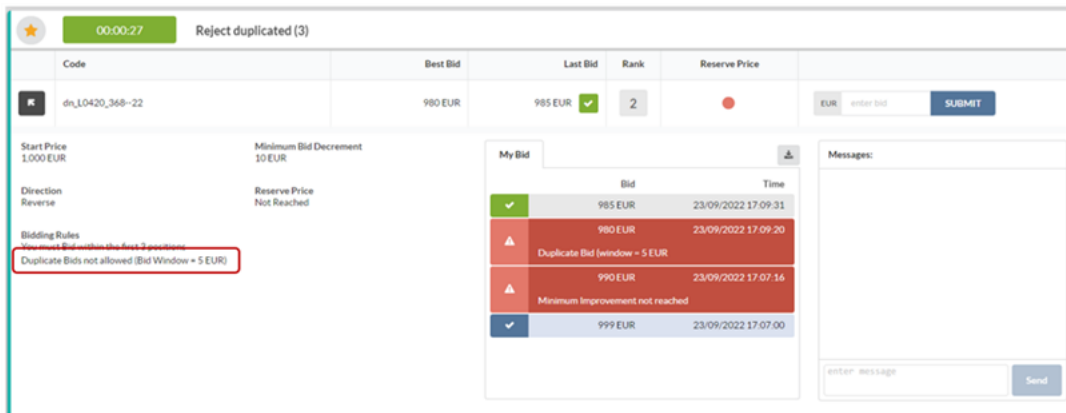
## Bidding in Auctions with Bid Windows

Buyers may define a Bid Window for **English single-lot** or **multi-lot** auctions. A Bid Window is a zone that is placed around bids. Suppliers are unable to place bids that fall within the configured zone amount.

Information about tie bids and bid windows is displayed on the *Auction Configuration* page only if these options have been configured:



Information about tie bids and bid windows is displayed in your Auction Monitor only if these options have been configured:



- If an auction is configured only to avoid tie bids, the information *Duplicated Bid Not Allowed* is displayed.
- If a bid window is configured, the amount is displayed.

### Scenario 1: Only Tie Bids are Prevented

- If you enter a bid equal to the best bid of another supplier, the bid is rejected.
- You will receive an error notification *Duplicated Bid not allowed. Enter a different amount.*



## Scenario 2: A Bidding Window is Enabled

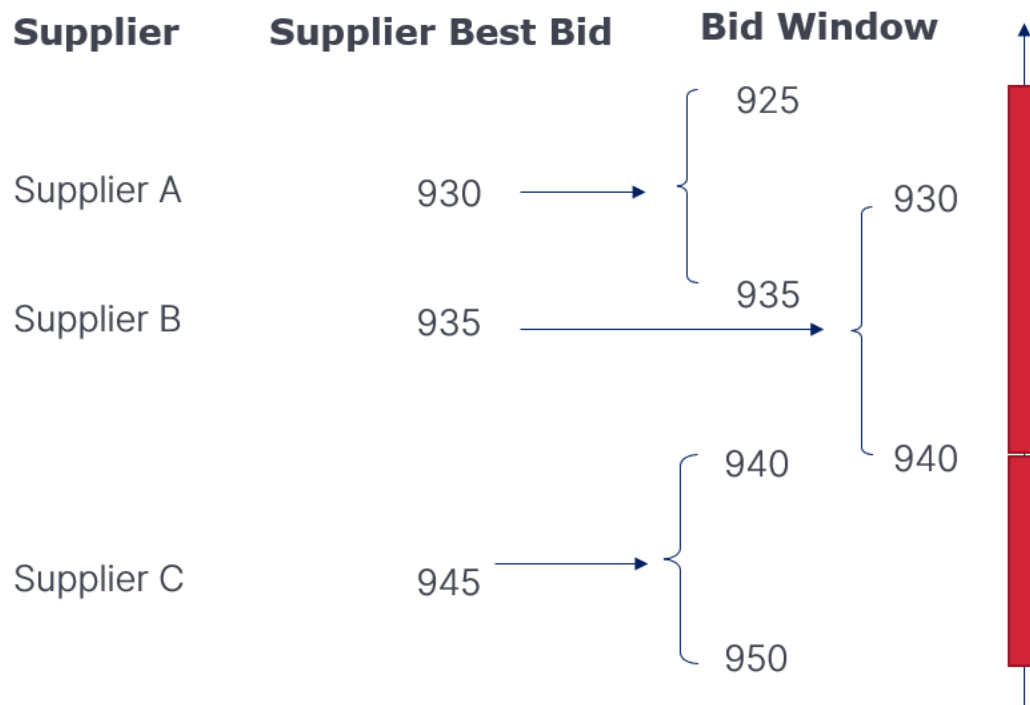
A zone is defined around the best bid of each supplier. The extension of this zone is defined by the amount of the bid window.

- If you enter a bid within a bidding window zone, the bid is rejected.
- You will receive an error notification *Duplicated Bid not allowed (Bid Window = ##). Enter a different amount.*
- In this example, a bid window is configured as **5**.



- Valid bids are:
  - Lower than 925
  - Between 935 and 945
  - Between 955 and 965
  - Greater than 975

- If supplier bids create an overlap in bid windows, valid bids must be outside the areas covered by the combined windows. In this example, a bid window is configured as **5**.



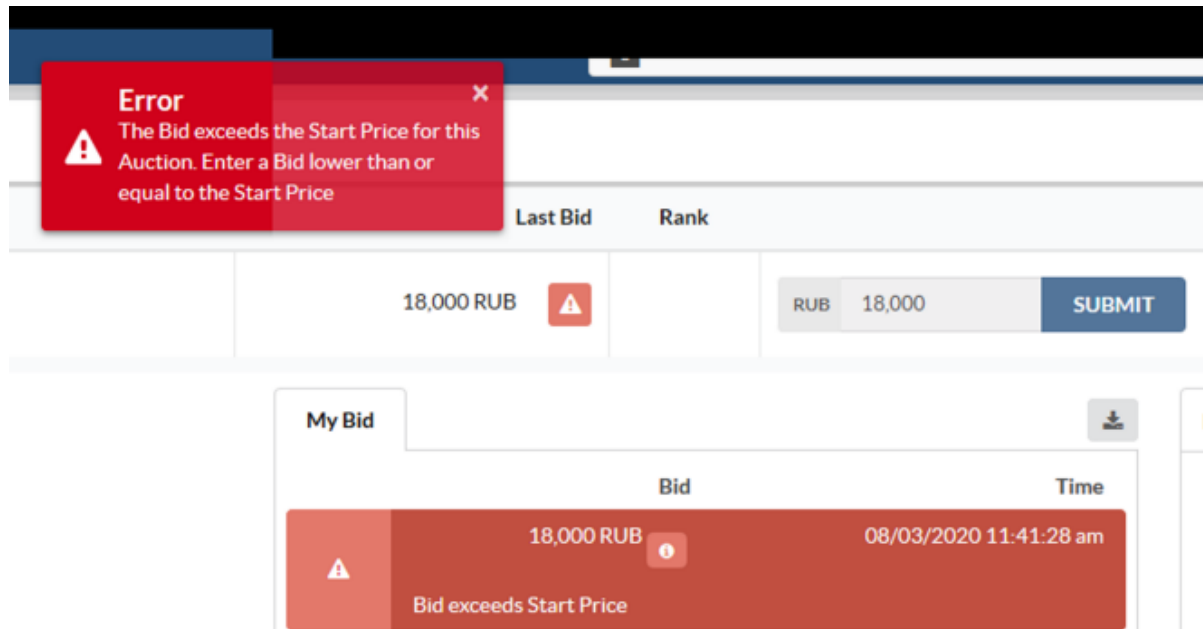
- Valid bids are:
  - Lower than 925
  - Equal to 940
  - Greater than 950

## Identifying Bidding Errors

If your bid is not valid, you will be prompted to correct it. For example, a bid might not be valid if it is:

- Too low, for a forward auction
- Too high, for a reverse auction
- Too much or too little, depending on the size of the bid increment or decrement
- A duplicate bid

An error message appears onscreen briefly to explain the cause of the error and the steps you should take to correct it. Invalid bids are logged in the **My Bids** column.



## Modify Bids that are Non-compliant with Minimum Bid Decrement

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

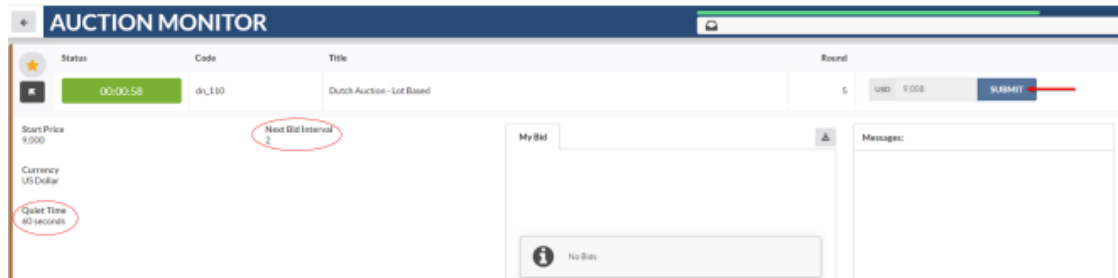
1. Click OK if the notification appears to inform you that the bid is not low enough or is too low.
2. Update your price in the Unit Price cell(s) so the bid value is decreased by the amount indicated in the Minimum Bid Decrement field.

## Bidding in a Lot-Based Dutch Auction

**Note:** Lot-based Dutch auctions close on the first bid.

1. The current price offer appears in the bid box. If this offer is acceptable, click **Submit**.
2. If no participants accept the offer during the round, a new round with a new bid offer is opened after the configured quiet time. The amount of the bid offer is determined by the auction's **Bid Interval**, which is the increment in value between two rounds.

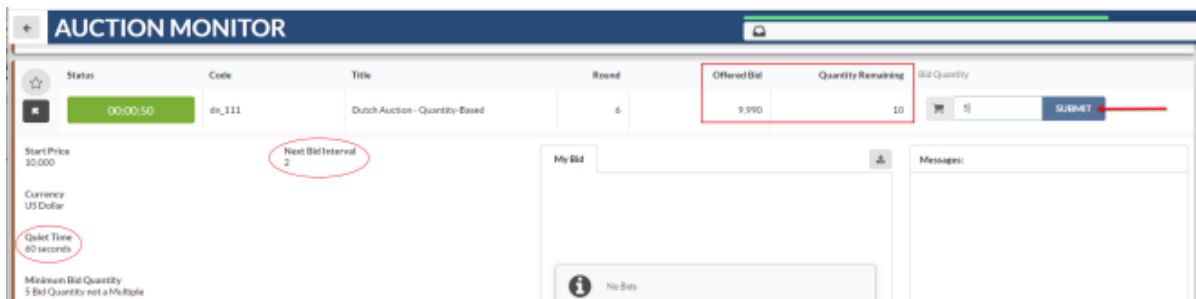
3. Rounds continue until a participant is willing to accept the price, or a predetermined reserve price (the seller's minimum acceptable price) is reached.



4. For auctions configured with automatic awarding, at the end of the auction, you will see the auction status move to *Awarding* if the rules that trigger automatic awarding are met. Otherwise, the status is *Ended*.

## Bidding in a Quantity-Based Dutch Auction

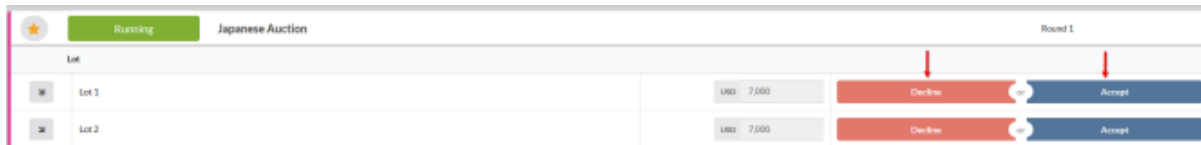
1. The offered bid amount and available quantity appears onscreen. Enter the quantity you are willing to purchase at the offered bid amount.
2. If any quantity remains at the end of a round, a new round with a new bid offer begins after the configured quiet time. The amount of the bid offer is determined by the auction's **Bid Interval**, which is the increment in value between two rounds.
3. Rounds continue until all quantity offered has been accepted, or a predetermined reserve price (the seller's minimum acceptable price) is reached.



## Bidding in a Japanese Auction

1. The current price offer for each lot appears in a separate bid box. If this offer is acceptable, click **Accept** or **Decline**.
2. Click **Confirm** to accept or confirm your response.
3. Repeat the steps above for each auction lot.

**Note:** If necessary, buyers can open additional rounds with different bid offers for each round in the auction. You may be invited to a new round even if you declined an offer in a previous round.



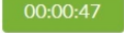
## Participating in a Ticker Auction

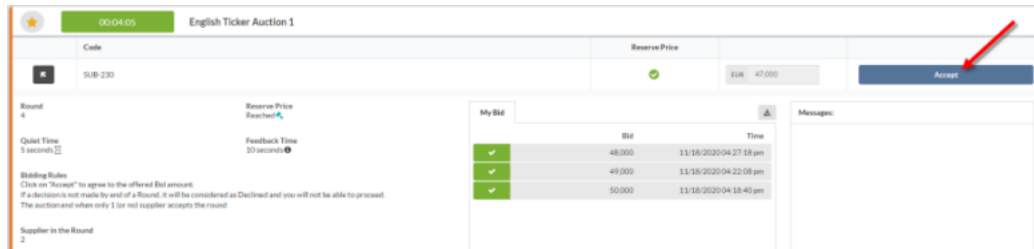
The screenshot shows a 'Demo English Ticker' auction interface. It includes a 'Current Round' section with a 'Countdown' of 00:01:26. A 'Reserve Price' of EUR 850 is displayed with a green checkmark. A 'My Bid' table shows a list of previous bids. A 'Messages' section is at the bottom right. Annotations with red lines point to various elements:

- Countdown:** Points to the 00:01:26 timer.
- Information for Reserve Price Reached (if configured to be displayed):** Points to the green checkmark next to the reserve price.
- Amount (possibly different for each supplier depending on weights defined by buyer):** Points to the 'EUR 850' value.
- Button to Accept (active if the supplier is in the round, the round is opened, and not yet accepted):** Points to the 'Accept' button.
- Quiet Time is displayed only if different than 0:** Points to the 'Quiet Time 5 seconds' field.
- Information about suppliers in the round is displayed only if the auction is configured to display this information:** Points to the 'Suppliers in the Round 2' section.
- List of previous round accepted:** Points to the 'My Bid' table.
- Standard messaging chat:** Points to the 'Messages' section.

Each round in a Ticker auction has three stages:

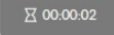
1. **Time to Bid** - This is the only stage in which you can accept the current offer.

- **Time to Bid** is displayed on the auction clock as 
- The **Accept** button is active. Click **Accept** to accept the offer in the current round:



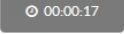
- Bids are processed as in other Sourcing+ auction formats. Bid confirmation or rejection is displayed immediately.

2. **Quiet Time** - The **Accept** button is inactive during this stage and new bids cannot be entered. However, if bids that were sent during **Time to Bid** are received during **Quiet Time**, they are accepted.

- **Quiet Time** is displayed on the auction clock as 

**Note:** Ticker auctions might be configured to eliminate the **Quiet Time** period.

3. **Feedback Time** - Suppliers that accepted the proposed amount in the current round receive an automatic confirmation and continue to the next round. Suppliers that do not accept the proposed amount are notified that the auction has closed for them.

- **Feedback Time** is displayed on the auction clock as 
- The **Accept** button is inactive during this stage and bids cannot be entered or accepted during this stage.
- Auctions cannot be suspended or restarted during this period.
- Feedback is provided during this period. The following messages could appear, depending on your status in an auction:
  - If you do not accept a round: *Auction <\_REFERENCE\_CODE/> will close for you. The offered bid was not accepted.*
  - If you accept a round and a new round starts:
    - Japanese Ticker: *Auction <\_REFERENCE\_CODE/>: A new Round will Start.*

- English Ticker: Auction <\_REFERENCE\_CODE/>: A New Round will Start. More than 1 Supplier remains in the Auction.
- English Ticker Shortlisting: Auction <\_REFERENCE\_CODE/>: A New Round will Start. More than <\_VALUE/> Suppliers remain in the Auction.

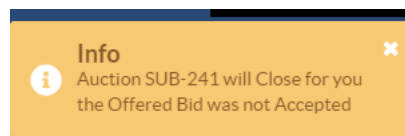
**Note:** Depending on auction configuration for English or English Ticker Shortlisting, feedback messages could include a count of the suppliers remaining in the auction. This option is not possible for Japanese Ticker auctions.

- When the auction ends with a winning situation: *You have won the auction* <\_REFERENCE\_CODE/>. You will receive further communication from buyer.
- When the auction ends with a tie situation: *The Auction* <\_REFERENCE\_CODE/> ended in a tie situation. You will receive further communication from buyer.

): auction ends when <2 suppliers accept the round								
Winning Situation					Tie Situation			
	Supplier A	Supplier B	Supplier C	Supplier D	Supplier A	Supplier B	Supplier C	Supplier D
Round 1	2000 Yes A new round is starting	Yes A new round is starting	Yes A new round is starting	Yes A new round is starting	Yes A new round is starting	Yes A new round is starting	Yes A new round is starting	Yes A new round is starting
Round 2	1900 Yes A new round is starting	Yes A new round is starting	Yes A new round is starting	Yes A new round is starting	Yes A new round is starting	Yes A new round is starting	Yes A new round is starting	Yes A new round is starting
Round 3	1800 Yes A new round is starting	Yes A new round is starting	Yes A new round is starting	No Auction is closed for you as you didn't accept the	Yes A new round is starting	Yes A new round is starting	Yes A new round is starting	No Auction is closed for you as you didn't accept the
Round 4	1700 Yes A new round is starting	Yes A new round is starting	Yes A new round is starting		Yes A new round is starting	Yes A new round is starting	Yes A new round is starting	
Round 5	1600 Yes A new round is starting	Yes A new round is starting	No Auction is closed for you as you didn't accept the		Yes A new round is starting	Yes A new round is starting	No Auction is closed for you as you didn't accept the	
Round 6	1500 Yes A new round is starting	Yes A new round is starting			Yes A new round is starting	Yes A new round is starting		
Round 7	1400 Yes You are the winner	No Auction is closed for you as you didn't accept the			No Auction ended with a tie situation	No Auction ended with a tie situation		

At the end of **Feedback Time**, a new round begins if the number of responding suppliers exceeds the targeted number of responders for that auction. The **Accept** button is activated for suppliers that remain in the auction.

If you did not accept the proposed amount, you cannot participate in further rounds in the auction.



Suppliers that have dropped out of a Ticker auction see *Round Closed* for the auction's status on their **My Auctions** page and in the auction header bar located at the top of all pages within the auction.

My Auctions Auction Monitor

Filter By: All Auctions

Code	Monitor	Title	Project Code	Buyer Organization	Start Date	End Date	Status
1 SUB-234		English Ticker Auction 4	PROC-266	PM Guru	11/19/2020 04:37 PM	11/19/2020 04:47 PM	Ended
2 SUB-233		English Ticker Auction 3	PROC-266	PM Guru	11/19/2020 04:24 PM	11/19/2020 04:29 PM	Ended
3 SUB-232		English Ticker Auction 2	PROC-266	PM Guru	11/18/2020 09:12 PM	11/18/2020 09:22 PM	Ended
4 SUB-231		English Ticker 1	PROC-266	PM Guru	11/18/2020 06:23 PM	11/19/2020 03:44 PM	Awarded

▼ Auction : SUB-231 - English Ticker 1  Awarding

Project:PROC-266- K Project

## Concluding a Ticker Auction

- **Japanese Ticker Auctions** - This auction concludes when no suppliers accept the final round.
- **English Ticker Auctions** - This auction concludes when no more than 1 supplier accepts the final round.
- **English Ticker Shortlisting Auctions** - This auction ends when fewer than a preconfigured number of suppliers accept the current round.

The final suppliers are notified immediately in the Auction Monitor for all ticker auctions.

## Email Reminders

Suppliers that have not responded to an RFX may receive single or multiple reminder emails. These mailings are sent according to the scheduled timing in the RFX configuration. Email messages contain information about how much time is remaining before an RFX's closing date/time.

Email reminders stop when you submit a response to an RFX or when you decline to respond.

## Manage Auction Messages

### Create and Send Messages to the Buyer

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

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

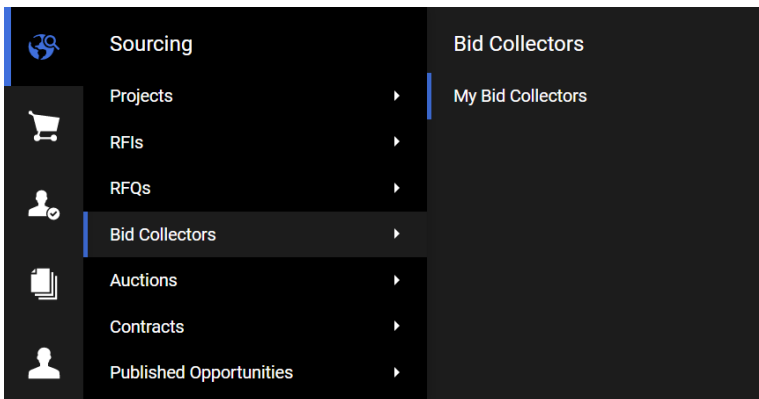
When the auction has ended, you will receive a pop-up notification that the lot is closed. You will no longer be able to place bids for the lot. Click **OK** in the pop-up notification. Exit the Auction Monitor or continue to bid on other running lots.

# 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.

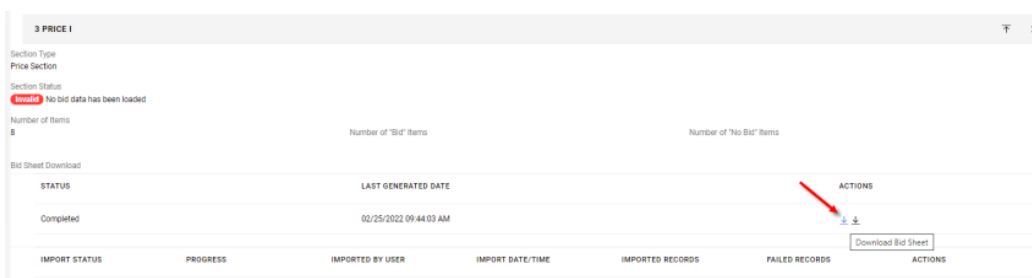
Buyers can configure the settings of a **Bid Collector** differently, such as the response deadline and item list configuration, to regulate how invited suppliers will participate in the event.



## Prepare Your Response



1. On the left navigation menu, browse to **Sourcing**  > **Bid Collectors** > **My Bid Collectors**.
2. Click a **Bid Collector Title** link to open the document. The Bid Collector will open to the **Details > My Response** page.
3. Along with the document and project titles and codes, the Bid Collector header displays the closing date, round number, and supplier submission date.
4. Click the **+** icon on the *My Response* page to begin creating a response.

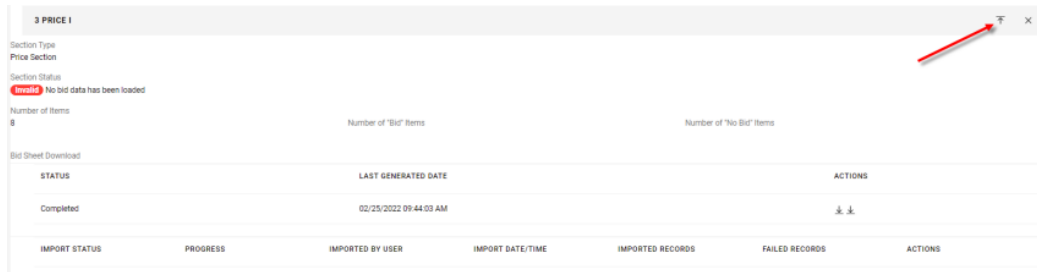
5. Click the pencil icon  in each **Question Section** and **Discount Section**, completing the questions within the section and saving your responses before moving to the section. Mandatory questions are marked with a \*.
6. Click download icon  for each **Price Section**. The Item list download will begin.
  - a. The **Section Status** and **Bid Sheet Download Status** entries will inform suppliers about the status of their generation requests. You will be alerted when the file generation is complete by a screen overlay alert box.
  - b. When the file is available, you can click the appropriate download icon  to save a local copy of the Excel file. **Note:** Hover your mouse over each download icon to verify the function for each.



- c. You can enter your data on the **Bid Response** tab of the Bid Sheet file and save your changes. **Yellow shading** indicates cells that require a mandatory response. **Blue shading** indicates cells for optional responses.


				Mandatory Price >= 0	Numeric > 10
Item Code	Item Description	Item UOM	Historic Cost	Number Greater than 10	
10000	Item 1	ea	100	22	
10001	Item 2	ea	100	22	
10002	Item 3	Kg	200	22	
10003	Item 4	Kg	100	23	
10004	Item 5	Pieces	800	23	
10005	Item 6	Pieces	200	23	
10007	Item 7	ea	100	22	
10008	Item 8	Kg	500	22	

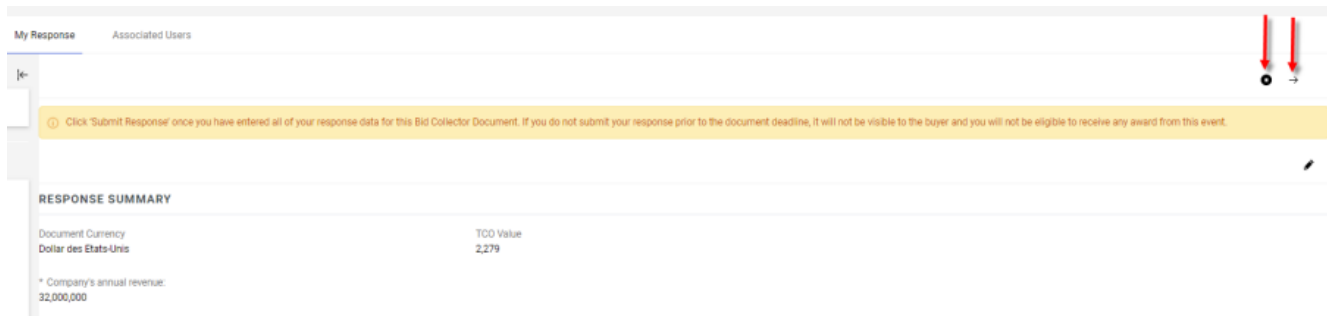
- d. When your response is ready, click the import icon  and use the File Selector to upload your Bid Sheet file. After you select your Excel file, click the import icon  within the file selector to load your bid sheet to the Bid Collector.



## Submit Your Response

When your response is complete, click the submit icon  on the **Details > My Response** page.

**Note:** If you choose not to respond to a Bid Collector invitation, you can click the decline icon  instead.







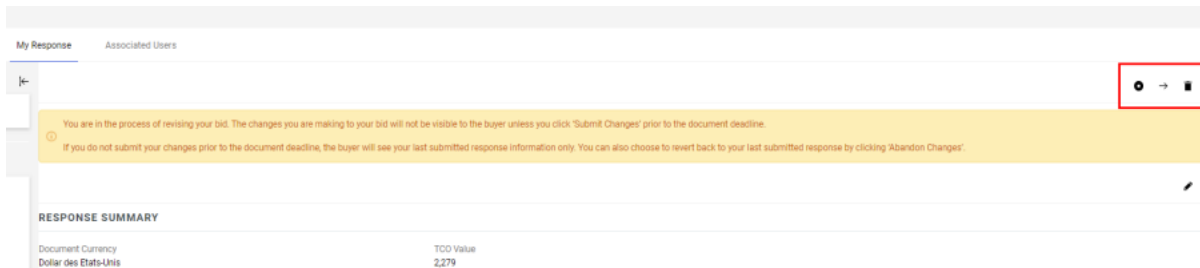
If any mandatory data is missing or invalid, a pop-up box will indicate the fields that must be corrected before your response can be submitted.

After you submit your response, the response status will change from *Preparing Response* to *Response Submitted*.


## Revise Your Response

You can edit and resubmit your responses at any time before an active Bid Collector's **Closing Date and Time**.

- Navigate to **Details > My Response** and click the pencil icon . **Note: Response Status** changes to *Revising Bid*.
- Click **OK** to the screen overlay warning message.
- When changes are complete, the following options are available:
  -  (**Submit Response**)
  -  (**Decline to Respond**)
  -  (**Abandon Changes**- this choice leaves the original response in place.)



## Revise Price Section Response

You have the option to upload a revised bid sheet by clicking the upload icon  within the appropriate **Price** section.

Alternatively, you may choose to **Clear Bids** by clicking the trash can icon .

You can also click the **X** to signal **No Bid** for all items in a Price section.



These options that are all located in **Price** section headers.

## Clear Bids

The Clear Bid icon  clears the bid data for a **Price** section so you can restart your bid from scratch.

After selecting this option, you cannot submit your response to a bid collector document until you import a bid for the **Price** section or select the No Bid icon **X** within the **Price** section.

This option only alters your working bid and it will not clear any data from your last submitted response.



If you previously submitted a bid for a bid collector and want to remove it from consideration, click the pencil icon  followed by the **Decline To Respond**  icon prior to the closing date of the Bid Collector so the response will NOT be visible to the buyer.

## No Bid

The **No Bid** icon **X** is provided for you to indicate 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.

This option 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.



## Decline to Respond

1. On the left navigation menu, browse to **Sourcing**  > **Bid Collectors** > **My Bid Collectors**.
2. Click the **Bid Collector Title** link to open a document. The Bid Collector will open to the **Details > My Response** page.
3. Click the **Decline to Respond** icon .
4. Select an option from the **Select a Decline to Response Reason** drop-down.
5. Fill in the text box titled **Enter Decline to Respond Reason Details**.
6. Click the **Decline to Respond** action button to finalize this decision.

The Bid Collector **Response Status** changes to *Response Declined*.

**Note:** You can also decline to respond after you have submitted a response. This process is described above in the section called "**Revise Response**".

## Undo a Decline to Respond

1. On the left navigation bar, browse to **Sourcing**  > **Bid Collectors** > **My Bid Collectors**.
2. Click the **Bid Collector Title** link to open a document in *Response Declined* status. The Bid Collector will open to the **Details > My Response** page.
3. Click the **Undo Decline** icon .

4. The Bid Collector's **Details > My Response** page will open. The Response Status is now *Preparing Response*.

## Concurrent Editing

Multiple users from your organization may be granted access to work with the same Bid Collector document. In general, the application will not attempt to prevent this from happening. If multiple users are trying to save updates to the same section simultaneously, the person to save the document last will generally have their updates stored in the database.

There could be cases in which a second user's actions are blocked because someone else's action prevents updates to the document. For example, if you are attempting to save updates to a **Question Section**, and another user has already submitted a response, or has deleted a response, your save of the question updates will end in an error message indicating that the response is no longer in the correct state to allow your save to take place.

There is one area in which the application will proactively try to prevent users from operating on the same data: once a user begins to import bids for a specific **Price Section**, then no other imports for that **Price Section** will be allowed to be scheduled. Similarly, operations like **Submit Response** and **Delete Response** will not be allowed because it is imperative that the bid import run to completion before these other operations can be taken.

## Bid Collector Messages

You can contact the buyer through the Messages area within a 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

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. Enter a **Subject**.
4. Enter the **Message**.
5. Optionally, add an attachment to support your message.
6. 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**

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.




# My Organization

## View Organization Profile

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

### Organization Profile Tabs

- **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 (e.g. supplier activation). **Note:** Depending on the organization's configuration, this tab might not be available in the Organization Profile.
- **Profile Data** - Contains a record of all Profile Forms to which you have access. A **Phase** displays for each Form, indicating if the page is displayed during Onboarding (before activation) or if the page is for Additional Information collection when logging to the application (after activation). Click the title of each page to view the details. You can also click the pencil icon  on the details page of any section to edit the available fields.
- **Certificates** - Contains a record of all your profile documents/attachments in one area that allows you to manage the expired attachments directly without navigating to the related forms/pages.
- **Buyer Attachments** - Access the attachments uploaded by the buyer (if this option is enabled).
- **Supplier Attachments** - Create Folder and Upload files about the company information (if this option is enabled). These attachments can be accessible by buyers.
- **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.

# Select and Manage 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.

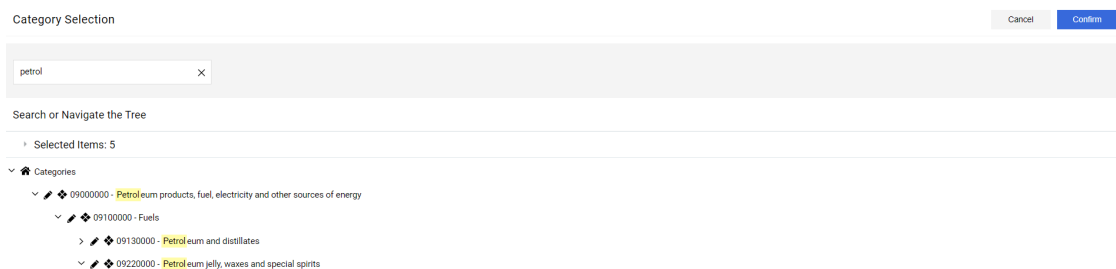
Your classifications may also be used as the basis for formal supplier category assessments.

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

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 **Collapse All** and **Expand All** buttons to control the display of subcategories in the tree.
3. To search for categories, begin entering a keyword or category code into the box located immediately above the category tree. The tree refreshes and displays the matching categories (highlighted in yellow).



Category Selection Cancel Confirm

petrol


Search or Navigate the Tree

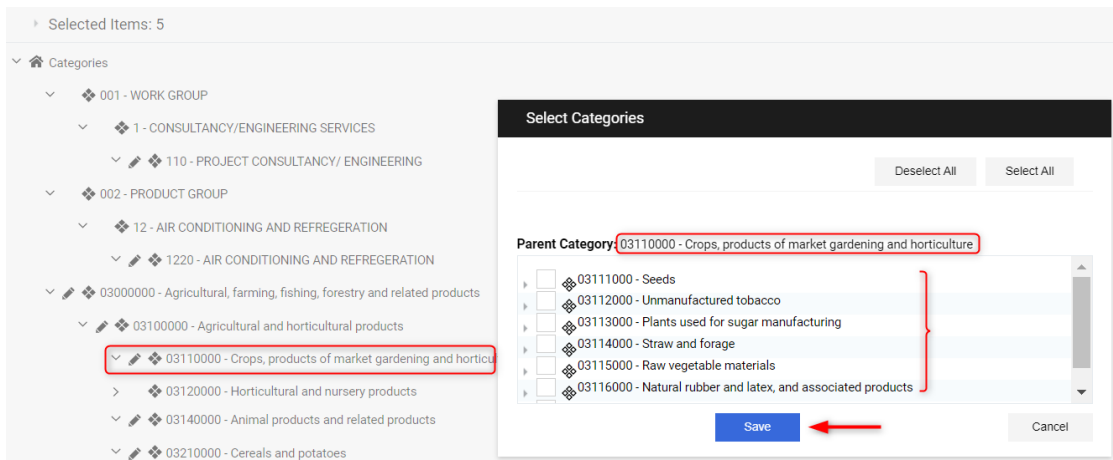
Selected Items: 5


Categories

- 09000000 - Petroleum products, fuel, electricity and other sources of energy
  - 09100000 - Fuels
    - 09130000 - Petroleum and distillates
    - 09220000 - Petroleum jelly, waxes and special spirits

4. Select the appropriate **Category or Categories** (at leaf level) by clicking the pencil icon 

- Click the pencil icon  beside the category, you can see all the sub-categories in the fly-out. Select the categories from the checkbox and click **Save**:





**Note:** Depending on the organization's configuration, you may not need to click the pencil icon  and just select the categories via the checkbox directly.

- Click **Confirm**. 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. To access and respond to the category specific forms, follow the below steps:



- Navigate to **My Organization**  > **My Categories**.
- Select the **Category Title** associated with the "Category Form". You may notice the  icon associated to the category code as the form response is incomplete.

My Categories ... Add Category


Enter Filter (type to start search)

Showing Result 1 - 6 of 6

	CODE	TITLE	CLASSIFIED ON	ASSESSMENT STATUS
1	03114000	Straw and forage	11/03/2022 10:36:12	Assessment Status not visible
2	301 	EPC - BUILDINGS, HIGH RISE	02/09/2018 15:37:28	Assessment Status not visible
3	302  Incomplete Mandatory Questions	EPC - BUILDINGS, MULTI STOREY	02/09/2018 15:37:28	Assessment Status not visible
4	401 	CONS - CIVIL	02/09/2018 15:37:28	Assessment Status not visible
5	44111000	Building materials	20/03/2018 09:24:21	Pre Qualified
6	44192000	Other miscellaneous construction materials	01/07/2018 09:09:54	Appraisable

3. Select the  icon. Mandatory fields are marked with an asterisk (\*). Click **Save** to save your responses and return to **My Categories**.
4. When you complete all the mandatory fields and save the response, the icon will be updated to .

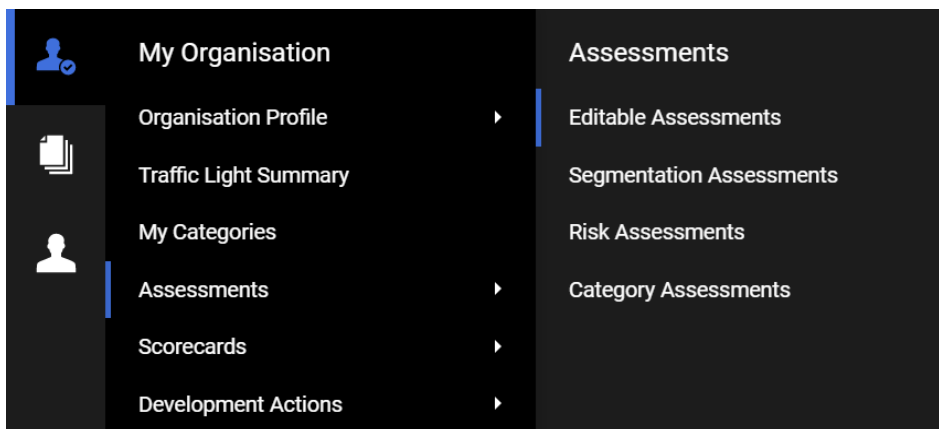
## View and Edit Assessments

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.

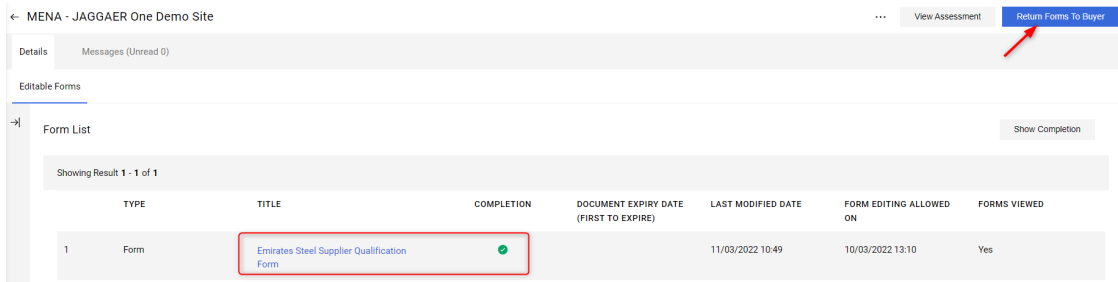
**Note:** Buyers control supplier visibility of assessment details. Therefore, suppliers may or may not be able to view assessment details from various buyers.




# Manage Assessments

## Edit Assessments

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. Access the form and click the  icon. The form switches to editable mode.
4. Enter responses to the fields on the form.
5. Click **Save and Next**. The form is saved and you can navigate back to the *Form list* by clicking the  arrow.
6. Click the **Return Forms to Buyer** button. **Note:** Once a form is returned to the buyer, it is no longer editable and will no longer appear on the *Editable Assessments* page.

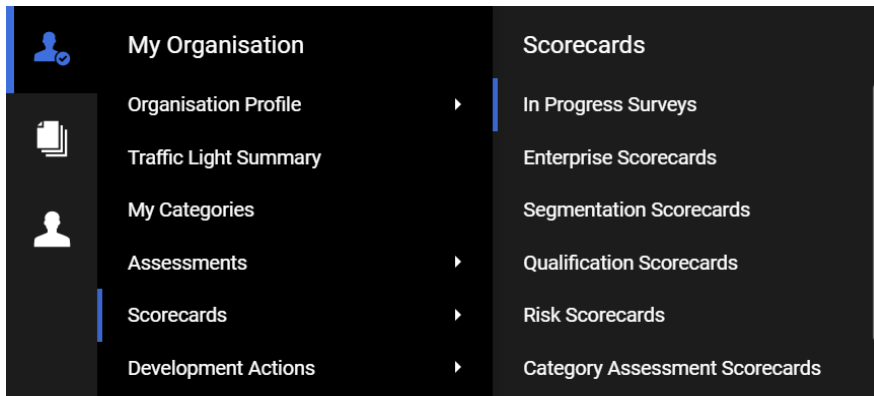


## Scorecards

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.

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.

Named Scorecard: Test5 Cancel Save **Save And Complete Survey**

→ Evaluation: 1, Reference Period: 20/04/2022 18:00

Date of Last Survey Response: Not Answered Unread Messages  
0 Access Scorecard Messages Area

Survey Form

2. GENERAL - YB

QUESTION	DESCRIPTION	RESPONSE	EDITABLE BY
2.1 eProcurement portal purpose	How easy did you find it to understand the purpose of the eProcurement portal?	Very Easy	Supplier
2.2 Information on the portal	How easy was it to find the information you sought for on the eProcurement portal?	Very Easy	Supplier
2.3 Ease of Registration	How easy was it to register your company on the portal?	Somewhat Easy	Supplier



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 **Confirm** 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.


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:
  -  - Return to the Received Messages list.
  - **Reply** - Reply to this message using the secure online messaging system.
  -  - 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

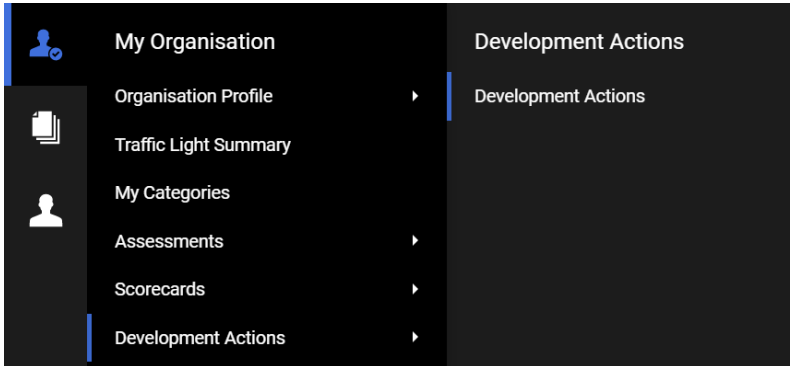
Organizations may utilize a **Supplier Development Plan** after evaluating the supplier performance and identifying the areas of growth / improvement. Based on the supplier performance, a plan will be designed with a specific set of actions for the supplier to complete in order to achieve the objective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

To access the list of development plan actions visible to you, navigate to **My Organization**  **> Development Actions > 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.

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.

Development Actions								...	Add Action To Plan
Development Actions									
Enter Filter (type to start search)									
Showing Result 1 - 10 of 17						Show: 10	1 2 →		
ACTION NAME	SUPPLIER ACTION OWNER	ACTION STATUS	ALLOW OWNER START	ACTION START DATE	ACTION END DATE	BUYER ORGANISATION	COLLABORATION STATUS		
1 Implement Corrective Actions	(Default)	Not Started	Yes			MENA - JAGGAER One Demo Site	Not Applicable		
2 Plan Corrective Action	(Default)	Not Started	Yes			MENA - JAGGAER One Demo Site	Not Applicable		
3 Root Cause Analysis	(Default)	Not Started	Yes			MENA - JAGGAER One Demo Site	Not Applicable		
4 Root Cause Analysis	(Default)	Running	Yes	02/03/2022	07/03/2022	MENA - JAGGAER One Demo Site	Not Applicable		

3. Complete the details (Action Name, Action Scope, Plan, Expected Duration).

4. Once the Action details are completed, click the **Save** button. Click **OK** in the pop-up.

## 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.

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** button, 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.

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:
  -  - Return to the Received Messages list.
  - **Reply** - Reply to this message using the secure online messaging system.
  -  - 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**.

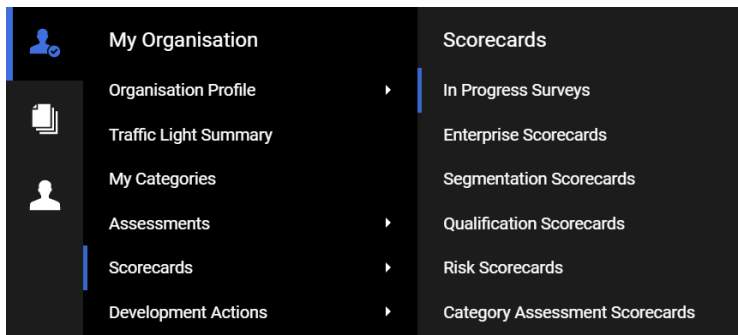
## Traffic Light Summary



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.



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  icon.

Traffic Light Summary

Traffic Light Statuses ➔

Enter Filter (type to start search)

Showing Result 1 - 1 of 1 Show: 10

	BUYER ORGANISATION	DIMENSION		STATUS
1	MENA - JAGGAER One Demo Site	Health and Safety	●	Semi Compliant

4. You can open the Traffic Light Summary in excel format.

# File Sharing

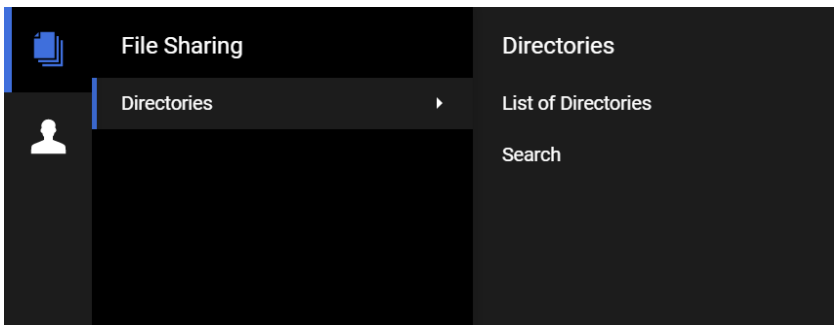
## File Sharing

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

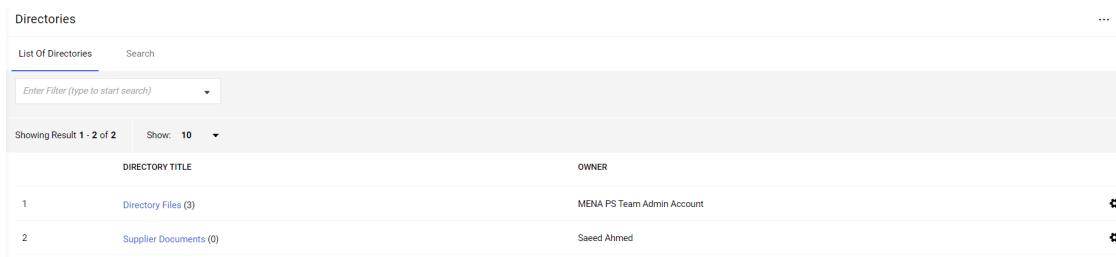
### View Shared Files



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.



1. Navigate to **File Sharing**  > **Directories** > **List of Directories**.







	DIRECTORY TITLE	OWNER	
1	<a href="#">Directory Files (3)</a>	MENA PS Team Admin Account	
2	<a href="#">Supplier Documents (0)</a>	Saeed Ahmed	

2. Access the Folder and download the files individually or all files via the **Mass Download** button.


← Directory Title: Directory Files ... **Mass Download** Copy All Folders And Files

→|

Showing Result 1 - 2 of 2 Show: 10 ▾

FOLDER/FILE NAME ↑	DESCRIPTION	LAST MODIFICATION DATE	STATUS
↑ ...			
1  test (1).docx		11/03/2022 11:45:06	● Available 
2  test.docx		11/03/2022 11:47:22	● Available 

**Note:**

Large files that are stored in external cloud storage cannot be downloaded with the **Mass Download** feature. Instead, these files must be downloaded manually. They can be identified by an **i**  icon.

A warning message conveys this information to users: "*The Mass Download feature does not download Large files; these files are exported just as text files to maintain the structures and they must be manually downloaded.*"

If these files are selected for mass download, a text file containing the same warning message is included in the zip file.