

Sourcing

Supplier Maintenance and Company Administration Buyer User Guide

Version 6.1
Ion Wave Technologies, Inc.
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Table of Contents

Table of Contents	2
Welcome to Supplier Maintenance and Company Administration!	4
Accessing the System	4
System Requirements.....	4
Guide Information	4
Working with the System	5
Sorting Lists	5
Menu Bars	5
Pagination Bars.....	5
System Time.....	5
Navigating the System	6
Suppliers Tab	7
Supplier Dashboard.....	7
Pending Activity Link or Suppliers Tab	8
Pending Supplier Activation Tab.....	8
Pending Special Classifications Tab.....	8
Pending Supplier Scoring Section Tab.....	9
All Suppliers Sub-Tab.....	10
New - All Suppliers	11
View – Active Suppliers Sub-Tab	11
Edit - Active Suppliers Sub-Tab.....	12
Message All - All Supplier Sub-Tab.....	17
Extract - All Supplier Sub-Tab.....	17
Filter - All Supplier Sub-Tab.....	17
Search - All Supplier Sub-Tab.....	17
Bidders Lists Sub-Tab – Suppliers Tab	18
Classifications – Suppliers Tab	19
Commodities Section – Classification Sub-Tab	19
Special Classifications – End Date	20
Primary Special Classification.....	20
Supplier Reporting.....	20
Administration	21
System Administration.....	21
User Tab Listing	21
Roles	24
Address Book Tab	27
Departments Tab.....	27
Attachment Library Tab.....	27
Sourcing Management	28
Commodities Categories	28
Categories Section	28
Commodities Section	29
Text Library.....	29
Attribute Library.....	30
Event Customization.....	30
Event Numbering.....	30
Unit Lists	32
Bid Authoring	32
Bid Templates.....	32
Bid Customization	33
Bid Types	33

Bid Line Types	36
Supplier Management	40
Supplier Scoring - Establishing Criteria.....	40
Administrators How-To Guide (Quick-Reference).....	42
Create New Users (Buyer Side)	42
Assign Roles.....	42
Change Buyer User's Password	42
Reset Supplier Password.....	42
Correct Supplier Login Error	43
Set-Up Auto-Event Numbering.....	43
Create New Bid Type.....	43
Create a New Line Type	44
Create an Attribute Category.....	45
Rename an Attribute Category	45
Create Attribute Types in the Attribute Library	45
Short Text Attributes.....	45
Long Text Attributes.....	46
Note Attributes	46
Numeric Attributes.....	46
Percentage Attributes	46
List of Values	47
Checkbox.....	47
Display Value	48
URL	48
Currency.....	48
Date.....	48
Custom	49
Create Bidders List	49
Extract a List	49
Offline Supplier – Create an Account.....	49
Offline Supplier – Change to an Active Supplier.....	49
Manual Bid Response Entry from an.....	50
Invited Supplier and Invited Offline Supplier	50
Un-invited Supplier and Un-invited Offline Supplier.....	50
Unsubmitted Responses	50
Edit Existing Supplier Response.....	50
Table of Figures	52

Welcome to Supplier Maintenance and Company Administration!

This guide is intended to provide instructions on how to use the Sourcing system to maintain users within the buying organization and the suppliers accepted into the system.

Accessing the System

System Requirements

In order to access the system, you will need a standard web browser that must have JavaScript enabled. We recommend Internet Explorer 6.x or greater for the best system performance (<http://www.microsoft.com/ie>). Your browser must also allow pop-up windows.

Additionally, the system will make certain documents available. In order to access these documents, you may need to download and install the following document viewers:

- Adobe Acrobat Reader, which is a free download from www.adobe.com.
- Microsoft Excel or the Microsoft Excel Viewer, which is a free download from www.microsoft.com/office/downloads/.

Guide Information

The pictures and screenshots used in this guide were taken from an IBM PC Compatible running Windows 2000 using Microsoft Internet Explorer 6. The appearance of the system may be slightly different on another operating system or Internet browser.

The guide is written using the most common configuration of the sourcing system. If the documentation refers to options or features you are not able to view, either your roles have been set in such a way that you do not have access to the function or your facility has specified a setup that does not include it.

Working with the System

Sorting Lists

Most listings within the system will support sorting by the various columns. Columns that can be sorted will have underlined headings. To change the sort, click on the hyperlinked column title. Switch the sort from ascending to descending by clicking the column title again.



Figure 1. Sorting Lists

Menu Bars

Throughout the system, listings and pages make use of menu bars that will display available actions. To take action on an item in a list, place a checkmark beside the item and click the menu bar button for the action you desire. Within a page, click the action you would like to take.



Figure 2. Menu bar display on a list.

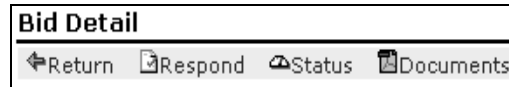


Figure 3. Menu bar display within a page

Pagination Bars

The system also has been designed to split long listings of items into multiple pages. Displayed at the bottom of every listing, the pagination bar will give the current item range displayed and the total number of lines on the right. A link to each page, buttons to move forward/backward a single page, and buttons to go to the beginning or end are also displayed.



Figure 4. Pagination bar example.

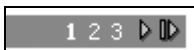


Figure 5. Page number bar example

System Time

The system time displays on every page of the system. This time may not be displayed or may not automatically update on some browser types. The time display is managed by your computer's Internet browser, which may result in the time being off by a few seconds.

Navigating the System

The Event Calendar Page will open after login. The calendar is found under the “Home” tab.

QuickLinks		Event Calendar						
Create New Bid		May 2006						This Month
My Draft Bids		Sun	Mon	Tue	Wed	Thu	Fri	Sat
My Issued Bids			1	2	3	4	5 RA-1/2006-5	6 A-1/2006-1 RA-1/2006-8
My Closed Bids		7	8	9	10	11 RA-1/2006-9	12 RFP-05/2006-15 RFP-05/2006-16	13
My Awarded Bids		14	15 BLD-1/2006-12 RFP-05/2006-1 RFP-05/2006-3 B-5/2006-1 Addendum 1 RFP-05/2006-15	16 RFP-1/2006-6	17 RFP-05/2006-4 Addendum 1 B-5/2006-2	[18] B-5/2006-1 Addendum 1	19	20
		21	22	23	24	25	26	27
		28	29	30 RFP-05/2006-4 Addendum 1	31			

Issue Dates Close Dates Activity Dates

Figure 6. Home Page

The home page is designed to provide a quick overview of the system. At the top of the page there are tabs that break up the system functionality into basic and high level categories. Each tab has a secondary set of menu options which display when the primary tab is selected.

Home	Bids	Auctions	Contracts	Suppliers	Admin
Supplier Dashboard	All Suppliers	Bidders Lists	Classifications	Supplier Reporting	

Figure 7. Suppliers Menu

Suppliers Tab

Selecting the Suppliers tab opens the Supplier maintenance section. Supplier Dashboard, All Suppliers, Bidders Lists, Classifications and Supplier Reporting are sub-tabs located on the tab strip below the Suppliers tab.

Supplier Dashboard

Dashboard
 Pending Activity
 Inactivated Suppliers
 Activity Summary

QuickLinks
 View Active Suppliers
 Bidders Lists
 Classifications
 Supplier Reporting

Administration
 Activate Suppliers
 Message All Suppliers

Pending Supplier Activity

Pending Activation Pending Special Classifications Pending Supplier Scoring

Suppliers Pending Activation

Activate Reject

Supplier Name	City	State	Zip	Reg. Date
Ameritas Life Insurance Corp.	Lincoln	NE	68521	07/17/2008

Items 1-1 shown of 1

Figure 8. Pending Suppliers Page

Supplier Dashboard

The Supplier Dashboard is available as a sub-tab. The Dashboard opening page defaults to the inactivated suppliers page. Link to other components of the Supplier Dashboard; pending activity, inactivated suppliers list and activity summary using the quick link at the left.

- Pending Activity Link – Provides a view of the pending supplier activity (see pending supplier sub-tab)
- Inactivated Suppliers Link – Provides access to 2 tabbed lists; inactive users on active suppliers and inactivated suppliers.
 - Inactive Users on Active Suppliers Tab – Provides a list of inactive users that are located in an active supplier (company) registration.
 - Inactivated Suppliers Tab – Provides a list of supplier (companies) that are inactive.

Supplier Dashboard

Dashboard
 Pending Activity
 Inactivated Suppliers
 Activity Summary

QuickLinks
 View Active Suppliers
 Bidders Lists
 Classifications
 Supplier Reporting

Administration
 Activate Suppliers
 Message All Suppliers

Inactivated Suppliers

Inactive Users on Active Suppliers Inactivated Suppliers

Inactive Users on Active Suppliers

Supplier	User Name	First Name	Last Name	Email
Alameda Store	RICHARDSONSTORE	Kelly	Zippa	dhenders241@netscape.net
AMT Store	MEMPHIS	John	Memphis	dhenders241@netscape.net
Atlanta Store	DOCSHRED	Elmo	Martinez	jworkman@naplesgov.com
BH Photo	JACKSONSTORE	Bob	Smith	dhenders241@netscape.net
Bottle Store	BOTTLESTORE	Kelly	Zippa	dhenders241@netscape.net
Distribute Inc.	TJONES	Tom	Jones	demoaccount@ionwave.net
Fresno Store	FUSION	Darren	Henderson	darreniwt@netscape.net
Fresno Store	FRESNOSTORE	Darren	Henderson	darreniwt@netscape.net
Fusion Elec	FUSION	Darren	Henderson	darreniwt@netscape.net
Grand Praire Store	GRANDPRAIRIESTORE	Avery	Stevens	dhenders241@netscape.net
Harrison Supply	RIVERSIDE	Kelly	Zippa	dhenders241@netscape.net
Jackie's General Supplies	DACCT13	Demo	Account 13	demoaccount@ionwave.net
Jackson Store	JACKSONSTORE	Bob	Smith	dhenders241@netscape.net
KC Store	KCSTORE	Elmo	Martinez	dhenders241@netscape.net
Lilia's Clothing Boutique	SMITH	lori	smith	noname@gmail.com
Lincoln Store	LEXSTORE	Darren	Henderson	darreniwt@netscape.net
Memphis Store	PILLOW	Heather	Montgomery	dhenders241@netscape.net
Memphis Store	MEMPHIS	John	Memphis	dhenders241@netscape.net
Moore Medical Corporation	MOORE	Julie	Moore	dhenders241@netscape.net
Provider Company	PROVIDER	Elmo	Martinez	dhenders241@netscape.net

Items 1-20 shown of 22 • Page 1 of 2 shown

Figure 9. InactiveUsers/Suppliers

Pending Activity Link or Suppliers Tab

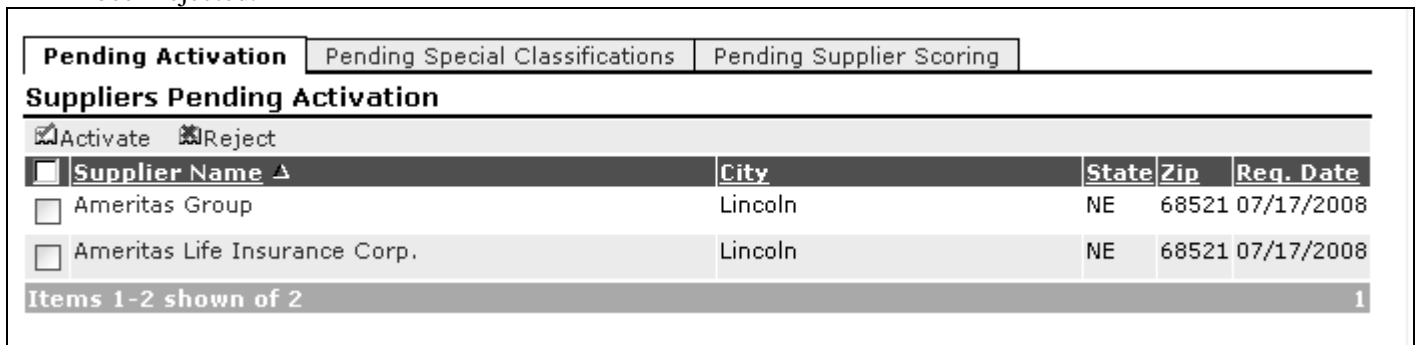
The Pending Suppliers activity is divided into 3 tabs. Access the tabs by using the Pending Activity Link in the box at the left of the screen or click the Supplier Tab and the screen will open to the pending activity screen .

- **Pending Activation** – Suppliers who have submitted a registration request and have not been activated.
- **Pending Special Classifications** – Suppliers who have requested special classification status.
- **Pending Supplier Scoring** – List of supplier score cards that have not been published.

Pending Supplier Activation Tab

Once the supplier has completed registration, the pending registration will be listed under the pending activation tab. Actions include:

- **Activate** – Select desired supplier(s) and click Activate. Suppliers will receive notification that their registration has been activated.
- **Reject** – Select desired supplier(s) and click Reject. Suppliers will receive notification that their registration has been rejected.



The screenshot shows a web interface with three tabs: "Pending Activation", "Pending Special Classifications", and "Pending Supplier Scoring". The "Pending Activation" tab is selected. Below the tabs is a header "Suppliers Pending Activation" and two buttons: "Activate" (checked) and "Reject". A table lists two suppliers:

<input type="checkbox"/>	Supplier Name ▲	City	State	Zip	Req. Date
<input type="checkbox"/>	Ameritas Group	Lincoln	NE	68521	07/17/2008
<input type="checkbox"/>	Ameritas Life Insurance Corp.	Lincoln	NE	68521	07/17/2008

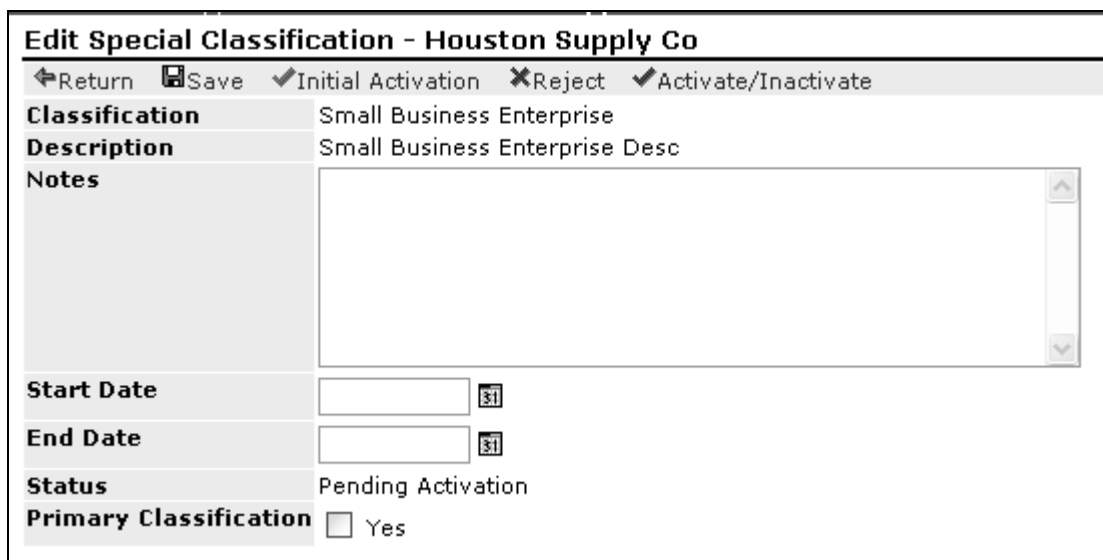
At the bottom, it says "Items 1-2 shown of 2" and a page number "1".

Figure 10.

Suppliers Pending Activation listing

Pending Special Classifications Tab

Suppliers requesting special classification status will be listed in the Pending Special Classifications tab in the Supplier Dashboard sub-tab. Click on the business name in the listing. The system will navigate to the Edit Special Classification screen. The supplier name will follow the hyphen.



The screenshot shows the "Edit Special Classification - Houston Supply Co" screen. It has a navigation bar with "Return", "Save", "Initial Activation" (checked), "Reject" (X), and "Activate/Inactivate" (checked). The form fields are:

- Classification:** Small Business Enterprise
- Description:** Small Business Enterprise Desc
- Notes:** A large text area with a scroll bar.
- Start Date:** A date input field with a calendar icon.
- End Date:** A date input field with a calendar icon.
- Status:** Pending Activation
- Primary Classification:** Yes

Figure 11. Special classification activation or edit screen

The following actions may be taken from the edit special classification screen:

- **Return** –Returns to the previous screen without any action being taken. You must click “save” before clicking “return” if you want to retain your entries.
- **Save** – Any changes to notes or dates will be saved; however, the status of the special classification request will not be changed until it is Rejected or Activated using the initial activation function.
- **Initial Activation** – The supplier’s account will be associated with the listed special classification if activated. The supplier will receive notification that their special classification request has been activated. **The system does not allow use of the activate/inactivate function for the initial activation.**
- **Reject** – The supplier’s account will not be associated with the listed special classification if rejected. The suppliers will receive notification that their special classification request has been rejected.
- **Activate/Inactivate** –When clicked, it reverses the current status. When a supplier’s special classification association has been inactivated, the supplier’s name will not display in any searches or participation reports
- **Notes** – use the notes field to enter notes that will be visible to the buyers only.
- **Start and End Dates** – The time period the supplier’s account will be associated with the special classification.
- **Primary Classification Checkbox** – A supplier may have more than one classification. Check the box if the classification is the primary classification.

How to permanently remove a supplier from a special classification is covered in the *Active Suppliers Section*.

Pending Supplier Scoring Section Tab

To score a supplier’s performance, click on the hyperlinked business name, select applicable values for each category, and click Publish.

Pending Supplier Scoring			
Supplier	Event Number	Event Type	Status Date
General Store Supplies	B-21505-02	Open Bid	03/10/2005
Jones Supply	B-21505-02	Open Bid	03/10/2005
All School Equipment	B-20205-02	Open Bid	02/25/2005
Jones Supply	B-20205-02	Open Bid	02/25/2005
Art Works		<i>Manual Scoring</i>	02/22/2005
All School Equipment	B-20105-01	Informal Quote	02/21/2005
All School Equipment	B-20305-02	Open Bid	02/21/2005
Jones Supply	B-013105-01 Addendum 2	Open Bid	02/15/2005
Brandywine Equipment	013105-02 Addendum 1	Open Bid	02/01/2005

Figure 12. Pending supplier scores

Edit Supplier Event Scoring - A Lot

Return Save Publish

* indicates a required field

Scoring Date * 04/25/2008

Notes

Quality of Goods N/A (Weight: 100)

Delivery Timeliness N/A (Weight: 75)

Customer Service N/A (Weight: 100)

Safety N/A (Weight: 150)

On Time and On Budget N/A (Weight: 150)

Service Completion and Budget N/A (Weight: 100)

Figure 13. Edit Supplier Event Scoring

Once the score has been published, the supplier's name will be removed from the listing. Supplier scoring is explained later in this document.

All Suppliers Sub-Tab

The Active Suppliers sub-tab provides access to All Suppliers. A brief overview of the functionality of each action is listed below. A detailed explanation of each action is explained on the following pages.

- **New** – Create a new supplier.
- **View** - View the complete supplier record.
- **Edit** – Edit existing supplier information.
- **Activate/Inactivate** – Activate inactivated suppliers, or inactivate active suppliers.
- **Activity** – Statistics on a supplier's activity within the system.
- **Send Message** – Send a message to a specific supplier.
- **Message All** – Send a message to **all** suppliers.
- **Extract** – Extract supplier information.
- **Filter** – Search for specific suppliers based on criteria you specify
- **Search** – Search for specific suppliers using a first name, last name, user name or e-mail address

Home Bids Auctions Contracts Suppliers Admin									
Supplier Dashboard		All Suppliers			Bidders Lists		Classifications		Supplier Reporting
All Suppliers									
*New View Edit Activate/Inactivate Activity Send Message Message All Extract Filter Search									
<input type="checkbox"/>	Supplier Name	City	State	Zip	Req. Date	Avg. Score	Classifications	Status	
<input type="checkbox"/>	4-L Engineering Company, Inc.	Garland	TX	75042	03/13/2008			Inactive	
<input type="checkbox"/>	AAAA Supply	Anywhere	AL	11111	02/04/2008			Offline	
<input type="checkbox"/>	ABC Corp	AnyTown	MO	65806	02/28/2005	10.00 (1)		Active	
<input type="checkbox"/>	ABC Supply	City	FL	32092	01/04/2005			Active	
<input type="checkbox"/>	Abolins	City	FL	32092	01/04/2005	0.00 (0)		Active	
<input type="checkbox"/>	ACE Pipe Cleaning	Kansas City	MO	64127-2290	12/04/2006			Inactive	
<input type="checkbox"/>	Alameda Store	AnyTown	MI	48824	04/08/2005		MBE	Active	
<input type="checkbox"/>	American Cleaning Systems, Inc	Columbia	MO	65202	03/12/2007			Active	
<input type="checkbox"/>	Ameritas Group	Lincoln	NE	68521	07/17/2008			Active	
<input type="checkbox"/>	AMT Store	AnyTown	MO	65806	01/28/2005			Active	

Figure 14. All Supplier Listing

New - All Suppliers

You may create a new supplier account bypassing the supplier registration process. When you create the account, it will be flagged as 'Offline' until an individual user account is created for the supplier. Complete required and desired fields and click "save". The description field will display the word "default". Replace the text with a description of your choosing. The system will navigate to the Supplier edit screen.

Add New Supplier	
Return Save	
Supplier Name	Masterson Maintenance
<i>Supplier Address Information</i>	
Description	Maintenance contractor
Address	2236 W. Elm St.
City	Springfield
State/Province	Missouri
Zip/Postal Code	65806
Country	United States of America

Figure 15. Add a new supplier.

View – Active Suppliers Sub-Tab

View includes the following functions and tabs *which will be discussed in detail in following sections*. From the "All Suppliers" list choose a vendor and click "edit".

The functions include, "return", "activate/deactivate", "blacklist supplier", "activity", "history", "send message".

The tabs include, "profile", "commodities", "special classifications", "address book", "users", "scoring", "insurance", "notes".

Edit - Active Suppliers Sub-Tab

Supplier data has been divided into the following categories and are represented by different tabs on the tab-strip.

- **Profile** – Edit supplier information such as their company name, tax number, and corporate status.
- **Commodities** – Update or reclassify a supplier’s commodity classification(s).
- **Special Classifications** – Remove a supplier from a special classification or enter a request for a supplier to be added to another special classification. If you are requesting a new special classification, this function will only create the request. You or an administrator will still be required to approve them for the new classification. You may also use this to reject a supplier’s request for inclusion in a special classification, update the dates, and add notes on the supplier’s special classification inclusion or inactivate them temporarily from the special classification association.
- **Address Book** – Add, edit or delete supplier address information.
- **Users** – Administrators may reset a supplier’s password. After clicking the button to reset a supplier’s password, enter a new e-mail address to send the new password. If desired enter a note to the supplier. If the account has been inactivated, check the Reactivate Account box and click Save.
- **Scoring** – Score the supplier’s performance on a listed bid award. (See Supplier Scoring section below)
- **Insurance** – Allows you to add and edit supplier insurance information. Fields for the company name, identification number, amount of insurance, start/end dates, agent and telephone number are provided.
- **Notes** – Add notes to a supplier’s account. Notes are internal and not displayed to suppliers.

Home	Bids	Auctions	Contracts	Suppliers	Admin
Supplier Dashboard	All Suppliers	Bidders Lists	Classifications	Supplier Reporting	
Supplier Maintenance - ABC Corp					
Return	Activate/Inactivate	Blacklist Supplier	Activity	History	Send Message
ABC Corp Information			Company Address		
Status	Active	Address	123 Any Street		
Average Score	10.00		AnyTown, MO 65806 USA		
Total Events Scored	1	Contact Name			
		Phone	800-111-2222		
		Fax			
		Email			
Profile	Commodities	Special Classifications	Address Book	Users	Scoring
	Insurance	Notes			
Profile Information					
Edit					
Company Information					
Trade Name	ABC Corp				
Legal Name					
Organization Type	Corporation				
Tax ID	654164544				
State of Incorporation					
Formation/Incorporation Date					
Website					
DUNS #					
Company Description					
Business Type					
Years in Business					
Number of Employees					

Figure 16. Supplier Maintenance (Edit Profile Page)

Forgotten Passwords

If a supplier should forget their password instruct them to use the 'Forgot your password?' link displayed on the login page.

Important note: When a supplier's password is being reset, the supplier user will receive an email from the system with a temporary password and will be prompted to change it when they login for the first time. You will never know the supplier's system generated password.

If a supplier has forgotten their user name, you can access it in the Active Suppliers area of the Suppliers tab by clicking on 'Users'.

Resetting Supplier Passwords / Send a Reset Password to a Supplier User's New or Different Email Address.

- To reset a supplier's password, locate their account under the Active supplier area and select the 'Edit' button.
- Select the Users tab and mark the checkbox before the user's name.
- Select 'Reset Password'; a pop-up box will ask "are you sure..." Choose "OK" or "Cancel". If the supplier user's email HAS NOT changed, you will not re-enter a new address. Select "Save".

If the supplier user's email HAS CHANGED you will need to instruct the system to send the supplier user's new temporary password to a new email address. In the Supplier Password Reset screen, you may change the supplier user's email address. Click Save and a temporary password will be sent to the new email address.

Supplier Password Reset - Flynn Contractors - Fred Flintstone

Return Save

* indicates a required field

* User Email	rhondavendor5@ionwave.net	<i>If changed, set the user email to this value.</i>
Note to Supplier	This is the new password you requested. Please use it to enter the system and when prompted enter a password of your own choosing.	
Reactivate Account	<input checked="" type="checkbox"/> Yes (Re-Activate account during reset)	

Figure 17. Supplier Reset Password screen

Check the Re-activate Account check box to Re-Activate the account during the password reset. This function will reset system security to allow three additional password attempts.

Supplier Login Errors - Supplier User Account Deactivation

If a supplier user reports receiving the error displayed in the Figure below; it is likely that he has exceeded the allowed attempts to login with an incorrect username and/or password. The system administrator will have to edit the supplier account making the user active.

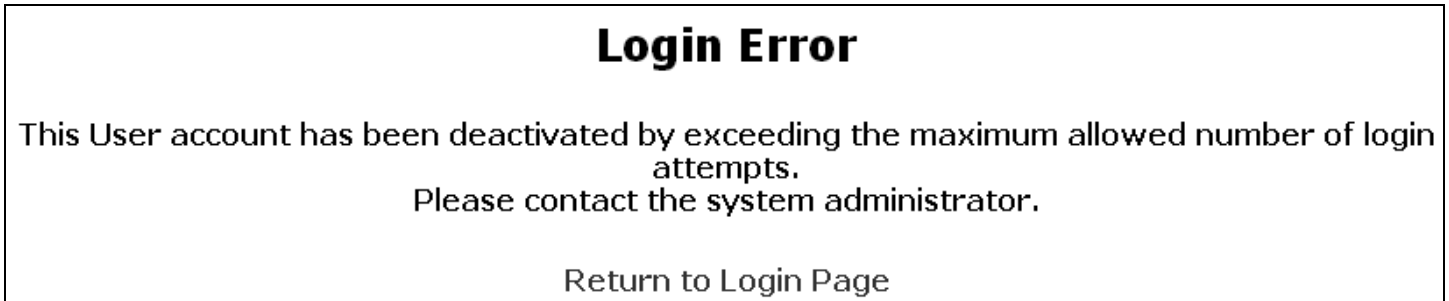


Figure 18. Login Error Message

Reactivating a Supplier User's Account – All Suppliers Sub-Tab

If a supplier attempts to login with a bad password more than 3 times, the system will automatically inactivate their account. To activate the account, locate the account under the Active supplier sub-tab and click the 'Edit' button. Select the Users tab, check the box before the user's name and choose "activate/inactivate" if the user account status is inactive.

Activate/Inactivate - All Supplier Edit Screen

This function will inactivate or reactivate a supplier's account. When inactivated all users associated with the supplier will no longer be able to login to the system. System generated emails will cease to be sent, and the supplier will not appear on auto-invite lists. The supplier account name will still display in Supplier listings, and if they have submitted a bid response or were invited to an event before they were inactivated, that bid response or invitation will still be active with the notation of 'Inactivated'.

Once a supplier account is reactivated, all function will be restored to them, including email notification of bid requests.

The system will notify the supplier by email when the account is activated or inactivated. Any activation or inactivation notes entered by you will be included in the email.

Blacklist Supplier – Activated Supplier Edit Screen

Blacklisting may be used at the supplier and user line level. It does not deny system access to the user. However, system generated e-mails will not be sent to a "blacklisted" supplier or user. Blacklisting affects only the system-generated e-mail. It does not affect any other function of the system.

- You may complete the "Optional" reason field.
- Select Save
- Select Return

Remove the "Blacklist" designation by selecting the "Blacklist" function and removing the check from the box. Choose "save" when you have completed the function.

Activity - All Suppliers Sub-Tab or Active Supplier Edit Screen

The activity page is accessed from the “active suppliers” sub-tab or the active supplier edit screen. It is split into two sections; a header section that contains the overall statistics of the supplier’s activity on the bidding system, and a tab-strip that provides access to the details.

Supplier Activity - Jones Supply						
Return						
Supplier Name	Jones Supply					
Status	Active					
Bid Response Ratio	57.78%					
Bid Award Ratio	17.78%					
Auction Response Ratio	35.71%					
Auction Award Ratio	07.14%					
<div style="display: flex; border-bottom: 1px solid black;"> <div style="border-right: 1px solid black; padding: 2px 5px;">Invitations</div> <div style="border-right: 1px solid black; padding: 2px 5px;">Responses</div> <div style="padding: 2px 5px;">Awards</div> </div>						
Bid Invitations						
View View Response						
	Bid Number	Bid Title	Bid Type	Invitation Date	Bid Status	Response Status
<input type="checkbox"/>	First Aid		Open Bid	03/11/2005	Cancelled	No Response
<input type="checkbox"/>	B-31105-02	First Aid Supplies	Open Bid	03/11/2005	Issued	No Response
<input type="checkbox"/>	B-31105-01	Main Office Supplies	Informal Quote	03/11/2005	Issued	No Response
<input type="checkbox"/>	B-31005-01	Grounds project bid	Open Bid	03/10/2005	Issued	Submitted
<input type="checkbox"/>	B-30905-01	Copier bid	Formal RFQ	03/10/2005	Cancelled	No Response
<input type="checkbox"/>	B-30905-01 Addendum 1	Copier bid	Formal RFQ	03/10/2005	Issued	Submitted
<input type="checkbox"/>	B-22805-01	Maintenance Supplies	Open Bid	02/28/2005	Issued	Unsubmitted
<input type="checkbox"/>	B-22405-01	Maintenance Supplies	Open Bid	02/25/2005	Issued	Submitted

Figure 19. Activity Page

The tab-strip has three tabbed sections:

- **Invitations** – A list of all of the bidding requests in which the supplier has been invited. The list contains basic information of each bid request. The “view” function will display the listed bid. “View Response” displays the supplier’s response.
- **Responses** – Provides a list of all bid responses and/or un-submitted draft bid responses. The options on the menu bar allow the user to view the bid requests listed, and/or view the supplier’s bid response to any bid request. Bid type, status date, bid status and response status are sortable columns.
- **Awards** – A list of bids that have been awarded to the supplier. The options on the menu bar, allow the user to view the bid requests listed, and/or view the supplier’s bid response to any bid request. The bid type and award date columns are sortable.
 - **Lines Awarded** – The total number of lines awarded to the supplier.
 - **Award Amount** – The total dollar amount of all of the line items awarded to the supplier from the selected bidding event.

History – Supplier Edit Screen

The “history” provides an audit log of activity that has transpired in the supplier account. The user’s username will appear at the end of each line of the audit log identifying the person accessing the system.

Supplier Audit History	
Return	
Date	Description
8/19/2008 5:28:06 PM CST	[Buyer] Commodity '(1050) Agricultural - Farming Services' deleted by KWALLS
8/19/2008 5:28:06 PM CST	[Buyer] Commodity '(1900) Computer Products, Accessories and Software' added by KWALLS
8/19/2008 5:27:46 PM CST	[Buyer] User 'KEWALLS1' status changed from 'Inactive' to 'Active' by KWALLS
8/19/2008 5:27:44 PM CST	[Buyer] User 'KEWALLS1' status changed from 'Active' to 'Inactive' by KWALLS
7/22/2008 1:41:08 PM CST	[Buyer] User KEWALLS1 Suppress Email Notification set to False by KWALLS. Reason: test
7/2/2008 9:33:22 AM CST	[Buyer] 'Contact Name' changed from '' to 'howdy doody' by KWALLS
7/2/2008 9:33:22 AM CST	[Buyer] 'Default Company Address' set to 'Yes' by KWALLS
7/2/2008 9:32:16 AM CST	[Buyer] 'Contact Name' changed from 'howdy doody' to '' by KWALLS
7/2/2008 9:32:16 AM CST	[Buyer] 'Default Company Address' set to 'Yes' by KWALLS
7/2/2008 9:32:04 AM CST	[Buyer] 'Contact Name' changed from 'howdy doody' to '' by KWALLS
7/2/2008 9:32:04 AM CST	[Buyer] set to 'Yes' by KWALLS
7/2/2008 9:31:45 AM CST	[Buyer] set to 'Yes' by KWALLS
7/2/2008 9:31:14 AM CST	[Buyer] 'Contact Name' changed from '' to 'howdy doody' by KWALLS
7/2/2008 9:31:14 AM CST	[Buyer] 'Default Company Address' set to 'Yes' by KWALLS
7/2/2008 9:30:50 AM CST	[Buyer] set to 'Yes' by KWALLS

Items 1-15 shown of 40 • Page 1 of 3 shown

Figure 20. Supplier Audit History

Send Message - Active Supplier Edit Screen

The “Send Message” function is found on the “Active Supplier” screen and the “Supplier Maintenance” screen. It allows you to select one active supplier and send an e-mail message from the Enterprise Sourcing system. A copy of the message posts to the supplier message area which is located on the home page next to the calendar link.

New Message

Return Save

* Required Information

Recipient(s) Jason Smith <rhondavendor3@ionwave.net>

* **Priority** Normal

* **Subject** Delivery Location

* **Message**

Please update all responses for delivery to the secondary warehouse location at 1221 South St. The normal warehouse will not accept delivery of these items due to a space issue. Please update your response accordingly.

Figure 21. New Message Screen

Senders may choose the priority of a message. A High-priority message activates a pop-up window with the message and displays to the supplier at login. The supplier must “Acknowledge” the message in order to continue using the system. Normal priority messages are sent to suppliers as a normal e-mail message. All messages post to the supplier’s message area located on the home page next to the “calendar” link.

See Commodities Section for information on sending a message to suppliers in a commodity code group.

Message All - All Supplier Sub-Tab

You may send a message to **all active suppliers** by selecting “message all”. **All suppliers** will receive the same message via email, at the priority level chosen. A copy of the message posts to the Messages area which is found next to the company profile sub-tab within the suppliers “Admin” tab.

New Message

Return Save

* Required Information

Recipient(s) All Suppliers

* **Priority** High

* **Subject** Manufacturer Update

* **Message** On line item 12 of RA-52005-13 - The manufacturer for this item can also be Reston, model number RT-5596.

Figure 22. High Priority Message

Extract - All Supplier Sub-Tab

Supplier information can be extracted from the All Suppliers List located under the active supplier sub-tab.

Filter - All Supplier Sub-Tab

Search for suppliers matching specific criteria. Filter criteria includes:

- **Supplier Name** – Searches for suppliers by company name.
- **Commodity Filter** – Searches for suppliers matching a specific commodity code.
- **Supplier Score** – Search only for suppliers who have a cumulative score of greater-than or less-than the value you enter.
- **Geographic Filter** – Search for suppliers based on their proximity to a zip code. The filter will return a list of suppliers located in the desired mileage radius of the entered zip code.
- **Classifications** – Searches for suppliers labeled with a selected special classification

Once a filter has been applied, the filter setting may be revised for continued searching or the applied filter may be removed.

- **Refine Filter** – Continue narrowing or expanding the list of filtered suppliers by updating your filtering criteria.
- **Remove Filter** – This removes any and all filters that are currently applied.

Search - All Supplier Sub-Tab

Search for supplier-users matching specific criteria. Search criteria includes:

- **User's First Name** – Searches for supplier-users by first name.
- **User's Last Name** – Searches for supplier-users by last name.
- **User's Username** – Searches for supplier-users by system username.
- **User's Email** – Search for supplier-users by Email address.

Bidders Lists Sub-Tab – Suppliers Tab

A bidders list is a group of suppliers that you choose to join together under a common name.

Bidders Lists	
<input type="checkbox"/> New <input type="checkbox"/> Edit <input type="checkbox"/> Rename <input type="checkbox"/> Delete <input type="checkbox"/> Send Message <input type="checkbox"/> Extract	
<input type="checkbox"/> Bidders List Δ	Suppliers
<input type="checkbox"/> Furniture	4
<input type="checkbox"/> Landscaping Contractors	4
<input type="checkbox"/> Paper Suppliers	4
<input type="checkbox"/> Science Department Supplies	3
<input type="checkbox"/> Supplies Bidders	3
<input type="checkbox"/> Teaching supplies	6
Items 1-6 shown of 6	
1	

Figure 23. List of Bidders Lists

Create an unlimited number of Bidder’s Lists. Suppliers can belong to more than one list at any time.

The ‘Bidders List’ page is found under the ‘Suppliers’ tab, and from that page the following actions may be performed:

- **New** – Create a new bidders list
- **Edit** – Edit an existing list
- **Rename** – Change the name associated with the list
- **Delete** – Remove the list.
- **Send Message** – Send a message to all of the bidders on the bidders list.
- **Extract** – Extract a list in a variety of formats depending on the user system configuration.

Select the desired Bidders List and click Edit.

Home					Bids		Auctions		Contracts		Suppliers		Admin	
Supplier Dashboard			All Suppliers		Bidders Lists		Classifications		Supplier Reporting					
Bidders List Maintenance														
Return														
All Suppliers						Suppliers - Janitorial Products								
<input type="checkbox"/> Add <input type="checkbox"/> Filter						<input type="checkbox"/> Remove								
<input type="checkbox"/> Supplier Name Δ	City	State	Avg. Score	Classifications	<input type="checkbox"/> Supplier Name Δ	City	State							
<input type="checkbox"/> AAAA Supply [Offline]	Anywhere	AL			<input type="checkbox"/> Abolins	City	FL							
<input type="checkbox"/> ABC Corp	AnyTown	MO	10.00 (1)		<input type="checkbox"/> Camco Inc. [Inactive]	Springfield	MO							
<input type="checkbox"/> ABC Supply	City	FL			<input type="checkbox"/> Distribute Inc.	Springfield	MO							
<input type="checkbox"/> Abolins	City	FL	0.00 (0)		<input type="checkbox"/> Jackson Store	City	FL							
<input type="checkbox"/> Alameda Store	AnyTown	MI		MBE	<input type="checkbox"/> Stone Company	AnyTown	AK							
<input type="checkbox"/> American Cleaning Systems, Inc	Columbia	MO			Items 1-5 shown of 5									
<input type="checkbox"/> Ameritas Group	Lincoln	NE			1									
<input type="checkbox"/> AMT Store	AnyTown	MO												
<input type="checkbox"/> Atlanta SStore	AnyTown	NY												
<input type="checkbox"/> Baltimore Store	AnyTown	AK		WBE										
<input type="checkbox"/> Bay County Store	Niangua	MO		WBE										
<input type="checkbox"/> BH Photo	AnyTown	AK												
<input type="checkbox"/> BlazinBrook	Houston	TX												
<input type="checkbox"/> Book Store	Nixa	MO	9.23 (1)	MBE										
<input type="checkbox"/> Bottle Store	AnyTown	MI		SBE										
Items 1-15 shown of 114 • Page 1 of 8 shown 1 2 3 4 5 6 7 8 \triangleright \llbracket														

Figure 24. Bidders List Maintenance

Select the desired suppliers and click Add. Repeat until all selected suppliers have been added to your bidder's list. Click Return.

Classifications – Suppliers Tab

Displays an overview of the suppliers registered in each commodity code and in each special classification. The two groups are listed separately, but the function of each listing is the same.

Home	Bids	Auctions	Contracts	Suppliers	Admin
Supplier Dashboard	All Suppliers	Bidders Lists	Classifications	Supplier Reporting	
Suppliers (Agricultural - Farm Equipment & Supplies)					
←Return					
Supplier Name ▲	City	State	Zip	Status	
Bay County Store	Niangua	MO	65713	Active	
Camco Inc.	Springfield	MO	65806	Inactive	
Doc Shred	AnyTown	NY	11530	Inactive	
Drury Roofing	Austin	TX	78757	Active	
Harrison Supply	Springfield	MO	65806	Active	
Jackson Store	City	FL	32092	Active	
Joe's Supplies	City	NC	11111	Inactive	
Lilia's Clothing Boutique	Round Rock	TX	78664	Active	
Longhorn Ltd.	Round Rock	TX	78680	Active	
One Stop Shop	Chippewa Falls	WI	54729	Active	
Rhonda's Stuff	Springfield	MO	65802	Inactive	
RRISD	Round Rock	TX	78681	Active	
Savannah Store	Marshfield	MO	65706	Active	
School Districts are us	Plano	TX	75023	Active	
Spiegel Athletics	Round Rock	TX	78681	Active	
Items 1-15 shown of 15					1

Figure 25. Special Classifications and Commodities

To view the suppliers in each group, select a specific commodity code or a special classification by placing a check in the box next to the group. The following actions are available:

- **View Suppliers** – Opens a list of the suppliers in the chosen group.
- **Send Message** – Send a message to all of the suppliers in the selected commodity code or special classification
- **Extract** – The user may choose “Extract” to pull a list of information for the suppliers in a commodity code group. The list provides the supplier name, address, city, state, zip and telephone number. It also provides the user(s) full name(s), system username and e-mail address.

Commodities Section – Classification Sub-Tab

The Commodities section is located under the Supplier Tab, Classification sub-tab. You may choose “View Suppliers” for a list of all suppliers in a specific commodity code group. The “Send Message” function allows you to send a message to all suppliers within a commodity code group. You may choose “Extract” to pull a list of information for the vendors in a commodity code group. The list provides the supplier name, address, city, state, zip and telephone number. It also provides the user(s) names, system usernames and e-mail address.

Special Classifications – End Date

When reviewing a supplier’s request to be labeled with a special classification the supplier administrator can specify an end date for the selected special classification. (See Figure below) The system can be instructed to generate an email notifying a designated user(s) when the End Date requirement has passed. A new End Date can be entered to reactivate the classification by entering the new date and clicking either ‘Save’ or ‘Approve’. Approve will send an email to the supplier informing them of the classification extension. ‘Save’ will update the account without sending a notification to the supplier. See New Administrative Emails for more information on system notifications.

Edit Special Classification - OKC Supply				
Return	Save	Initial Activation	Reject	Activate/Inactivate
Classification	Minority-Owned Business			
Description	Minority-Owned Business Desc			
Notes	Approved minority-owned business			
Start Date	08/14/2008	31		
End Date	08/14/2009	31		
Status	Pending Activation			
Primary Classification	<input checked="" type="checkbox"/> Yes			

Figure 26. Edit Special Classification Screen

Primary Special Classification

Sourcing now requires the Supplier Administrators to designate a primary special classification for a registered supplier. (Note the check box in figure above) This feature provides for accurate diversity reporting.

Supplier Reporting

Supplier reporting provides a list of responses by suppliers belonging to special classification groupings. The list is downloadable to Excel. The table provides the event number, award date, the total number of responses by a supplier, classification to which the supplier belongs, the number of responses by a supplier per special classification and the awarded amounts. Award date ranges may be selected before downloading to an Excel spreadsheet or for viewing selected timeframes.

Administration

Provides authorized users access to your company’s administration tasks. Administrative functions are listed below:

All of the administrative tasks are located under the following sub-tabs:

- System Administration
- Sourcing Management
- Contract Management
- Supplier Management

System Administration

The following tabs are available under the General Configuration Header

- **Users** – Full name, username, title, e-mail, creation date & status
- **Address book** – The addresses available to all buyers includes the settings of default Contact, Ship-To, and Bill-To addresses.
- **Attachment Library** – Create library categories and library attachments by clicking “new”. Attachments may be designated to categories

First Name	Middle Name	Last Name	User Name	Title	Email	Created	Status
John		Alexander	JOHN.ALEXANDER		demoaccount@ionwave.net	08/23/2006	Active
Kerry		Cook	KCOOK		demoaccount@ionwave.net	10/19/2005	Active
Ralph	Waldo	Emerson	RWE123	Sr. Purchasing Agent	darren@ionwave.net	05/24/2007	Active

Figure 27. System Administration

User Tab Listing

Allows you to manage buyers and administrative users within an organization. The Users page contains a listing of all users (past and present). The following functions are available in the blue tab-strip under the “User” tab.

- **New** – Create a new user
- **Edit** – Edit existing user information
- **Activate/Inactivate** – Activate or inactivate a user accounts. To inactivate, select a users account and choose “inactivate”. Inactivation denies the user system access and system-generated emails will cease. Inactivated users are notified of the inactivation via an email. A notation is displayed by the user name on the All Suppliers and the Users Profile page.

Add User

Select “new” from the “Users” tab to access the screen to add a user.

Add User

Return Save

** indicates a required field*

Prefix

User Name *

First Name *

Middle Name

Last Name *

Title

Email *

Phone **Country** **Area** **Number** **Ext**

Fax **Country** **Area** **Number** **Ext**

Time Zone Atlantic Standard Time

Password

Confirm Password

Figure 28. Add User

- Enter all required fields (all information is preferable, but the required fields must contain an entry)
- Select save to complete the addition of the user record.
- Selecting “Return” will not save the record.
- A message in red italic font will appear under the blue tab-strip confirming the user was added successfully.

Note: Each new account must be assigned a User Role. Proceed to “Edit User” to assign a role to the new user.

Edit User Profile

- All new users must be assigned a default role. Roles define what functions users are allowed to perform within the system.
- Assign a user role by selecting the user and choosing ‘Edit’.
- The “Edit User Profile” screen will open allowing edits.

Edit User Profile

[Return](#) [Roles](#) [Save](#)

** indicates a required field*

Prefix	<input type="text"/>								
User Name	* <input type="text" value="VIEWONLY"/>								
First Name	* <input type="text" value="View"/>								
Middle Name	<input type="text"/>								
Last Name	* <input type="text" value="Only"/>								
Title	<input type="text"/>								
Email	* <input type="text" value="support@ionwave.net"/>								
Phone	<table><thead><tr><th>Country</th><th>Area</th><th>Number</th><th>Ext</th></tr></thead><tbody><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr></tbody></table>	Country	Area	Number	Ext	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Country	Area	Number	Ext						
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>						
Fax	<table><thead><tr><th>Country</th><th>Area</th><th>Number</th><th>Ext</th></tr></thead><tbody><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr></tbody></table>	Country	Area	Number	Ext	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Country	Area	Number	Ext						
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>						
Time Zone	<input type="text" value="Atlantic Standard Time"/>								

*To keep your existing password, leave all the **Password** boxes blank.*

New Password	<input type="text"/>
Confirm Password	<input type="text"/>

If selected, this user will receive supplier registration notification emails.

Registration Notification?	<input type="checkbox"/> Yes
-----------------------------------	-------------------------------------

If selected, this user will receive supplier update notification emails.

Supplier Update Notification?	<input type="checkbox"/> Yes
--------------------------------------	-------------------------------------

If selected, this user will receive special classification update emails.

Classification Update Notification?	<input type="checkbox"/> Yes
--	-------------------------------------

Figure 29. Edit User Profile

Select Roles next to the “key” icon. Roles are displayed on the right side of the screen (see Figure below). You must choose one (1) role as a “Default” role. **It is important to remember that all users must be assigned at least one role, and one role must be set as the default role. Failure to set a “default” role will result in login failure.**

A drop down list on the right side of the screen provides access to the available roles. Add roles by selecting a role and selecting the ‘Add’ button. Assign the “Default” role by selecting the Role Name and choosing “Default”.

User Roles																													
Return																													
Workgroup	Roles																												
Demo	<input type="checkbox"/> Add Auction Authoring Administrator <input type="checkbox"/> Delete <input checked="" type="checkbox"/> Default																												
	<table border="1"> <thead> <tr> <th>Role Name</th> <th>Default</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> General Access</td> <td>N</td> </tr> <tr> <td><input type="checkbox"/> System Configuration General Administrator</td> <td>Y</td> </tr> <tr> <td><input type="checkbox"/> Supplier Management Administrator</td> <td>N</td> </tr> <tr> <td><input type="checkbox"/> Supplier Management Configuration Administrator</td> <td>N</td> </tr> <tr> <td><input type="checkbox"/> Sourcing Configuration Administrator</td> <td>N</td> </tr> <tr> <td><input type="checkbox"/> Sourcing Customization Administrator</td> <td>N</td> </tr> <tr> <td><input type="checkbox"/> Sourcing Multi-Workgroup Configuration Administrator</td> <td>N</td> </tr> <tr> <td><input type="checkbox"/> Bid Authoring Administrator</td> <td>N</td> </tr> <tr> <td><input type="checkbox"/> Bid Customization Administrator</td> <td>N</td> </tr> <tr> <td><input type="checkbox"/> Bid Multi-Workgroup Administrator</td> <td>N</td> </tr> <tr> <td><input type="checkbox"/> Auction Authoring Administrator</td> <td>N</td> </tr> <tr> <td><input type="checkbox"/> Auction Customization Administrator</td> <td>N</td> </tr> <tr> <td><input type="checkbox"/> Auction Multi-Workgroup Administrator</td> <td>N</td> </tr> </tbody> </table>	Role Name	Default	<input type="checkbox"/> General Access	N	<input type="checkbox"/> System Configuration General Administrator	Y	<input type="checkbox"/> Supplier Management Administrator	N	<input type="checkbox"/> Supplier Management Configuration Administrator	N	<input type="checkbox"/> Sourcing Configuration Administrator	N	<input type="checkbox"/> Sourcing Customization Administrator	N	<input type="checkbox"/> Sourcing Multi-Workgroup Configuration Administrator	N	<input type="checkbox"/> Bid Authoring Administrator	N	<input type="checkbox"/> Bid Customization Administrator	N	<input type="checkbox"/> Bid Multi-Workgroup Administrator	N	<input type="checkbox"/> Auction Authoring Administrator	N	<input type="checkbox"/> Auction Customization Administrator	N	<input type="checkbox"/> Auction Multi-Workgroup Administrator	N
Role Name	Default																												
<input type="checkbox"/> General Access	N																												
<input type="checkbox"/> System Configuration General Administrator	Y																												
<input type="checkbox"/> Supplier Management Administrator	N																												
<input type="checkbox"/> Supplier Management Configuration Administrator	N																												
<input type="checkbox"/> Sourcing Configuration Administrator	N																												
<input type="checkbox"/> Sourcing Customization Administrator	N																												
<input type="checkbox"/> Sourcing Multi-Workgroup Configuration Administrator	N																												
<input type="checkbox"/> Bid Authoring Administrator	N																												
<input type="checkbox"/> Bid Customization Administrator	N																												
<input type="checkbox"/> Bid Multi-Workgroup Administrator	N																												
<input type="checkbox"/> Auction Authoring Administrator	N																												
<input type="checkbox"/> Auction Customization Administrator	N																												
<input type="checkbox"/> Auction Multi-Workgroup Administrator	N																												
Items 1-1 shown of 1	1																												

Figure 30. User Roles

Roles

In Enterprise Sourcing 6.0, roles have been created that will allow either limited or full access to certain areas of the system, and roles/functions have now been separated into a more defined module structure. The general definitions of the available system roles are listed below.

Auction Authoring Administrator - Allows access to create, edit, issue, and award auction requests. “Auction Authoring – General” must be chosen along with other specific roles related to bid authoring in order for access rights to function properly.

Auction Authoring General - Allows access to create, edit, issue, and award auction requests. “Auction Authoring – General” must be chosen along with other specific roles related to auction authoring in order for access rights to function properly

Auction Authoring Manual Responses - Allows access to create, edit, issue, and award auction requests. This includes rights to manually enter supplier auction responses received from suppliers.

Auction Authoring View Only – This is a limited role that allows access to view auction drafts, issued, closed, awarded and cancelled auctions, as well as access to auction status and view documents.

Auction Customization Administrator - Allows access to create, edit or delete auction types and auction line types.

Auction Multi-Workgroup Administrator - Allows access and rights to create, edit, issue and award auction requests for multi-workgroups, as well as create and access auction request templates for multiple workgroups. This role is only available to clients who have purchased a Multi-Workgroup environment.

Bid Authoring Administrator – Allows access and rights to create, edit, issue and award bid requests, create manual responses, and access to bid request templates. Disqualification of a bid response is limited to this role.

Bid Authoring (Creation) – This is a limited role that allows access to create and edit bid requests. Provides access to view drafts, issued, closed, awarded and cancelled bids including system extracts. “Creation” does not provide access to “Issue” or “Award” bid requests.

Bid Authoring (General) – Allows access to create, edit, issue, and award bid requests. “Bid Authoring – General” must be chosen along with other specific roles related to bid authoring in order for access rights to function properly.

Bid Authoring (Manual Responses) – Allows access to create, edit, issue, and award bid requests. Includes rights to manually enter supplier bid responses received from suppliers.

Bid Authoring (View Only) – This is a limited role that allows access to view bid drafts, issued, closed, awarded and cancelled bids as well as access bid status and view documents.

Bid Customization Administrator – Allows access to create, edit or delete bid types and bid line types.

Bid Multi-Workgroup Administrator – Allows access and rights to create, edit, issue and award bid requests for multi-workgroups, as well as create and access bid request templates for multiple workgroups. This role is only available to clients who have purchased a Multi-Workgroup environment.

Bid Weighted Evaluation Administrator – Provides access to manage Sourcing’s bid weighting and scoring functionality. This role is only available to clients who have purchased the Bid Weighting and Scoring Module.

Bid Workflow Administrator – Administrator of this role can create and assign approval hierarchies for bid and award approval routing. This role is only available to clients who have purchased the Bid Workflow Module.

General Access – General access provides access to messages, calendar, awarded and cancelled bids. General access does not provide immediate access to all areas of the system. Roles must be chosen in addition to “General Access” for a user to have “rights” to those areas. Alternatively, it is recommended that the General Access role be added to all other roles assigned to a user.

Sourcing Configuration Administrator – Allows administrative access to commodity codes, text library and attribute library.

Sourcing Customization Administrator – Allows access to event numbering and unit lists

Sourcing Multi-Workgroup Configuration Administrator – Allows access to multi-workgroup text library and attribute library. This role is only available to clients who have purchased a Multi-Workgroup environment.

Supplier Management (Messaging) – Allows “view” access to supplier information. “Send Message” and “Message All” functions are allowed. User may access the view, activity, extract, filter, search and the Special Classification and Supplier Reporting sub-tabs. User does not have access to edit any records.

Supplier Management (View Only) - Allows “view” access to supplier information. User may use the view, activity, extract, filter, search and the Special Classification and Supplier Reporting sub-tabs. User does not have access to edit any records.

Supplier Management Administrator – Allows access to supplier information and registrations as well as access to Supplier Management Configuration.

Supplier Management Configuration Administrator – Allows access to supplier scoring and insurance types.

System Configuration General Administrator – Allows access to administrate the buyer side users, address book, departments and attachment library.

System Workflow Management Administrator – Allows access to workflow functions. The Administrator of this role can create and assign approval hierarchies for bid and award approval routing. The System Workflow Management Administrator role is only available to clients who have purchased the Bid Workflow Module.

The list below contains the recommended configurations for roles. Certain roles function best when other complimentary roles are assigned.

Role Name	Other Recommended Roles
Auction Authoring Administrator	General Access
Auction Authoring (General)	General Access
Auction Authoring (Manual Responses)	
Auction Authoring (View Only)	General Access
Auction Customization Administrator	General Access, Auction Authoring Administrator
Auction Multi-Workgroup Administrator	General Access, Auction Authoring Administrator
Bid Authoring Administrator	General Access
Bid Authoring (Creation)	General Access
Bid Authoring (General)	General Access
Bid Authoring (Manual Responses)	General Access
Bid Authoring (View Only)	General Access
Bid Customization Administrator	General Access, Bid Authoring Administrator
Bid Multi-Workgroup Administrator	General Access, Bid Authoring Administrator, Bid Customization Administrator
Bid Weighted Evaluation Administrator	General Access, Bid Authoring Administrator, Bid Customization Administrator
Bid Workflow Administrator	General Access, Bid Authoring Administrator, Bid Customization Administrator
General Access	None
Sourcing Configuration Administrator	General Access
Sourcing Customization Administrator	General Access, Sourcing Management Configuration Administrator
Sourcing Multi-Workgroup Configuration	General Access, Sourcing Management Configuration Administrator
Supplier Management (Messaging)	General Access
Supplier Management (View Only)	General Access
Supplier Management Administrator	General Access
Supplier Management Configuration Administrator	General Access, Supplier Management Administrator
System Configuration General Manager	General Access
System Workflow Management Administrator	General Access, System Configuration General Manager

System Administrator Email Options

The system administrator may select designated users to receive each of the following system generated emails:

- **Registration Notification** – Informs designated users of a new supplier registration pending approval.
- **Supplier Update Notification** – Daily report informing designated users when a supplier has updated their profile by adding new users, or editing a commodity profile or special classification.
- **Classification Update Notification** – Daily report informing designated users when a supplier’s special classification End Date has arrived.

See Figure 27. Edit User Profile to update notification designations.

Address Book Tab

Add a new address or edit or delete an existing address. Default addresses for Contact, Bill To, and Ship To locations are automatically displayed in draft bid requests.

Departments Tab

The departments tab is currently not being used but was created for upcoming Sourcing upgrades.

Attachment Library Tab

The “Attachment Library” is located under the “Admin” tab, “System Administration” sub-tab.

Library categories contain attachments. A category is chosen when creating a new attachment. Create a category if one does not exist before creating a library attachment.

Attachments that are part of a bid event may not be edited. The “Access Level” may be set in the “edit” mode to Public, Buyer Only or Online Only.

Warning: *You CAN delete an attachment category even if it contains attachments.*

Sourcing Management

Sourcing Management is divided into three main sections; sourcing configuration, bid management and auction management (if the users system is configured for auctions). The sections and the subdivision links are located in the shaded text box at the left of the screen.

General configuration refers to values and other information you may set up for your company to customize your bids.

Commodities Categories

The System Administrator has the ability to create and maintain top level and sub-categories (Tiers) to logically group commodities used within the system by selecting the “Commodity Code” tab under the Sourcing Management sub-tab.

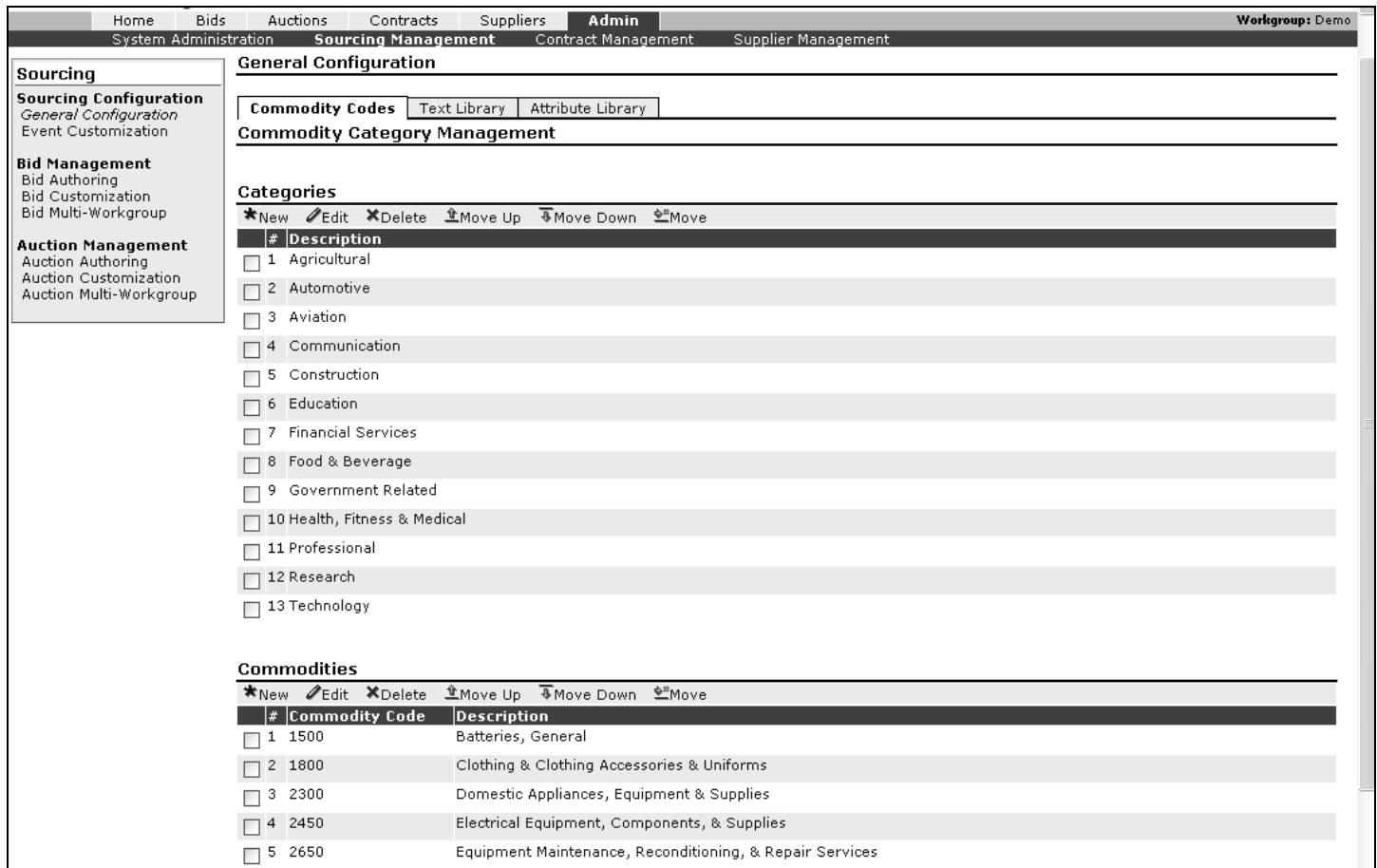


Figure 31. Category and Commodity Management Screen

Categories Section

- **New** – Add a new category or sub-category.
 - To create a new sub-category the System Administrator must first select “Edit” on an existing Top Level category.
- **Edit** – Edit an existing category or sub-category.
- **Delete** – Remove a category or sub-category. Sub-categories and related commodities must be deleted before a higher level category can be deleted. All vendor associations will be removed.
- **Move Up, Move Down, and Move to Number** – Change the order in which the categories are displayed on the supplier registration selection screen.

Commodities Section

- **New** – Add a new commodity code, display name, and assign a category. See figure below.
- **Edit** – Edit an existing display name, and change an assigned category. See figure below.
- **Delete** – Remove a commodity code. All vendor associations will be removed.
- **Move Up, Move Down, and Move to Number** – Change the order in which the commodities are displayed on the supplier registration selection screen.

Creating a New Commodity Code

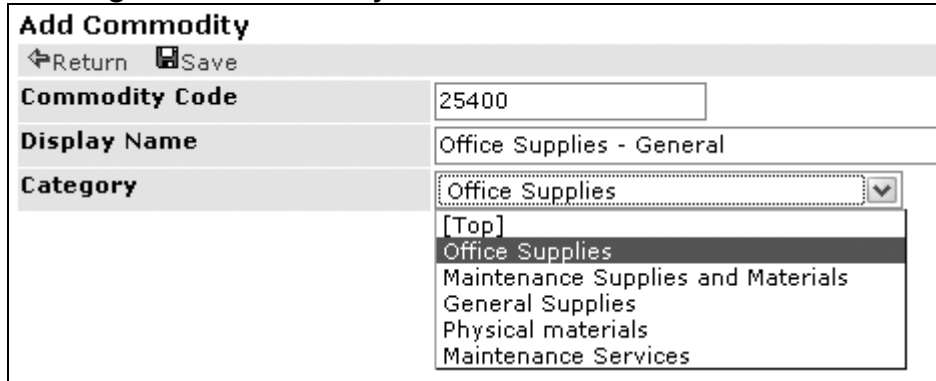


Figure 32. Commodity Creation Screen

NOTE: A commodity code can only exist once within the system, and can only belong to one category or sub-category.

Editing a Commodity Code

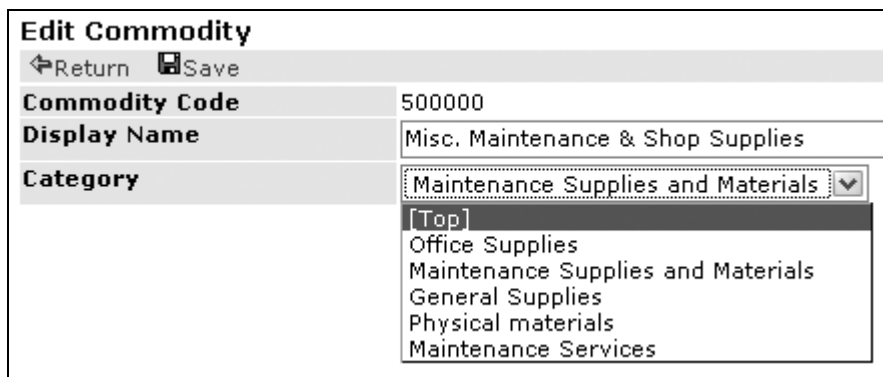


Figure 33. Existing Commodity Edit

Text Library

Provides functionality to create and maintain a company-wide library of note categories and notes used in a bid. You can create, edit, rename or delete categories which function like file folders that hold the various text entries from the library.

- **Text Categories** – use the icon bar to create and manage categories for desired text libraries.
- To “create” or “edit” a text entry, you must first go to the category in which the entry will be located. Do this by selecting “edit”.
- To add a text entry, you must first create the category and choose the category from the drop-down in the text entry creation process.
- Text library entries are used to quickly populate Bid Notes & Description fields on line items, packages and package line items and event activities.

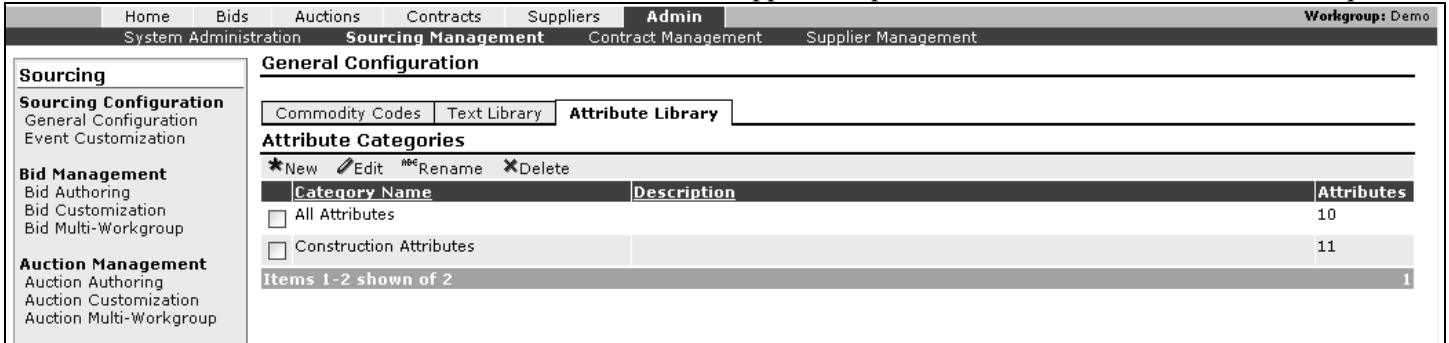
A text library category can not be deleted if it contains text entries.

Delete the entries before deleting the category. Each text entry must be deleted individually.

Attribute Library

The “Attribute Library” is located under the “Admin” tab, “Sourcing Management” sub-tab

Use the Attribute Library to create, maintain, and store commonly used attributes. When creating a bid request, the library is accessed, and the desired attributes are chosen from the library for use in the bid request. You may create an unlimited number of attributes, break them into categories for better organization, and use them at the bid header or bid line level. Bid line level attributes are used when the attribute applies to specific lines rather than the entire bid request.



The screenshot shows the Attribute Library interface. The top navigation bar includes Home, Bids, Auctions, Contracts, Suppliers, Admin, and Workgroup: Demo. The Admin tab is active, and the Sourcing Management sub-tab is selected. The left sidebar contains a menu with Sourcing Configuration, Bid Management, and Auction Management. The main content area is titled 'General Configuration' and has tabs for Commodity Codes, Text Library, and Attribute Library. Below the tabs, there are buttons for New, Edit, Rename, and Delete. A table titled 'Attribute Categories' is displayed with the following data:

Category Name	Description	Attributes
<input type="checkbox"/> All Attributes		10
<input type="checkbox"/> Construction Attributes		11

Items 1-2 shown of 2

Figure 34. Attribute Category Creation

Attribute Library functions include:

- **New** – Create a new attribute category.
- **Edit** – Edit or create attributes in an existing attribute category. The category may be edited by using the pull-down box, selecting the new category and saving the updates.
- **Rename** – Change the name of an existing attribute category. Rename and edit the optional description. Save updates.
- **Delete** – Delete an existing attribute category.

WHEN DELETING A CATEGORY, ALL OF THE ATTRIBUTES IN THE CATEGORY WILL ALSO BE DELETED.

Event Customization

The event customization link is located in the shaded text box at the left of the screen. It includes the event numbering tab and unit list tab.

Event Numbering

You may set up automatic Event Numbering sequences that can be assigned to specific event types and enforce a user standard. The underlying settings in an event can also be made obvious based on the numbering sequence assigned.

Sourcing Sourcing Configuration General Configuration Event Customization Bid Management Bid Authoring Bid Customization Bid Multi-Workgroup Auction Management Auction Authoring Auction Customization Auction Multi-Workgroup	Event Customization		
	Event Numbering Unit Lists		
	Event Numbering		
	<input type="checkbox"/> *New <input type="checkbox"/> Edit <input type="checkbox"/> *Delete		
	<input type="checkbox"/>	Description	Example
	<input type="checkbox"/>	ITB	ITB-9999
	<input type="checkbox"/>	RFP	05-9999
	<input type="checkbox"/>	RFQ	RFQ-9999
	<input type="checkbox"/>	Reverse Auction	RA-9999
	<input type="checkbox"/>	Sealed Bid	
<input type="checkbox"/>	RFI	RFI-2007-9999	
<input type="checkbox"/>	ITB Const.	2007-ITB-999910	
Items 1-7 shown of 7			

Figure 35. Event Numbering Sequences

You may set up an automatic event numbering sequence by selecting “Event Numbering” from the tab strip under Event Customization. A new event numbering description may be created or an existing event numbering sequence may be edited. To edit an existing sequence, select, create, edit or delete under the “Event Numbering Elements”.

Edit Event Numbering		
<input type="button" value="Return"/> <input type="button" value="Save"/>		
Description	<input type="text" value="RFP"/>	
Example	05-9999	
Event Numbering Elements		
<input type="checkbox"/> *New <input type="checkbox"/> Edit <input type="checkbox"/> *Delete		
<input type="checkbox"/>	# Type	Current Value
<input type="checkbox"/>	1 Text	05-
<input type="checkbox"/>	2 Autonumber	4
Items 1-2 shown of 2		

Figure 36. Event Numbering Elements

Consult the “Example”, displayed on screen, to view how the components will be displayed after creating an automatic numbering sequence.

Each component may include one of the following characteristics:

- **Text** – Any text character can be entered and will be displayed as an unchanging constant.
- **Auto-number** – this number will increase by one each time this automatic event numbering sequence is used. During set-up you will establish the starting value for the counter.
- **Date (Month)** – The month the event is being created in will be automatically added to the event number at time of creation.
- **Date (Year)** – This is the same as the Date (Month) sequence, but this will add the year.

Assign a number sequence to an event type after completing the creation process.

Unit Lists

Establish a defined limited listing of acceptable Units of Measure for a specific line type. Administrators are enabled to force a specific Unit of Measure when buyers are using a specific line type.

Creating a Unit List

1. Select on Unit List.
2. Select 'New' or 'Edit' to edit an existing list.
3. Enter a name for the Unit List and select 'Save'.

Repeat as needed.

Units of Measure section

1. Select 'New' to create a Unit of Measure label to display in the Unit of Measure drop-down-menu when creating a bid request line.
2. Enter a Name for the Unit of Measure
3. Enter a Description (Optional)
4. Select 'Save'
5. Select 'Return'

Repeat as needed.

Using a Unit List

Event Line Type - Sourcing Administrators may force the use of a predefined Unit List by assigning the Unit List to an Event Line Type. See the 'Event Line Type' section below for more information on managing line item data.

Bid Authoring

Bid Templates

Bid templates are designed for clients with more than one workgroup within their system. However, templates can also be a time-saving tool for organizations with one workgroup. The templates in this listing are available to all buyer and administrative users.

Template Bid Requests						
*New View Edit Copy Promote Delete						Show My Bids ▾
<input type="checkbox"/>	Bid Number	Bid Title	Bid Type	Created By	Close Date/Time /	Res/Inv
<input type="checkbox"/>	RFP-1/2006-12		Sealed Bid Request	Rhonda Harrison	2/28/2006 12:00:00 PM CST	0 / 7
<input type="checkbox"/>	B-0000000-05	First Aid Supplies	Sealed Bid Request	Rhonda Harrison	2/17/2006 12:00:00 PM CST	0 / 6
<input type="checkbox"/>	B-1/2006-00	Enviromental Bids	Blind Bid Request	Rhonda Harrison	2/17/2006 12:00:00 PM CST	0 / 6
<input type="checkbox"/>	ABC	Paper	Sealed Bid Request	Rhonda Harrison	2/16/2006 12:00:00 PM CST	0 / 0
<input type="checkbox"/>	121905-01		Sealed Bid Request	Rhonda Harrison	1/19/2006 12:00:00 PM CST	0 / 2
<input type="checkbox"/>	temp01	General bid template	Sealed Bid Request	Rhonda Harrison	7/2/2005 12:00:00 PM CST	0 / 0

Figure 37. Template Promotion

An administrator can 'Promote' a workgroup level template making it available to all buyer and administrative users in the system.

Bid Customization

Bid Types

Bid types are used to label different bidding events. They allow you to assign a label and establish the default security, invitation style, automatic event numbering, and other settings. The system has default bid types pre-configured upon application delivery; however, you have the ability to establish as many as needed. Bid types exist for both the Auction and Bid Request modules and the process to create them is the same, though the available options will differ.

New Bid/Auction Request Type

Choose the ‘Sourcing Management’ sub-tab select “Bid Customization” under the Bid Management section in the shaded text box at the left of the screen. Bid types may be created, edited or deleted from the “customization” screen.

Home	Bids	Auctions	Contracts	Suppliers	Admin
System Administration		Sourcing Management		Contract Management	
New Bid Request Type					
← Return Save					
<i>* indicates a required field</i>					
Type Name *	<input type="text"/>				
Display Name *	<input type="text"/>				
Description	<input type="text"/>				
Bid Security	Informal				
Invitation Style	Public - All matching suppliers				
Invitation Display	Hide Invitees				
Participants Display	Hide Participants				
Event Numbering	(No Event Numbering)				
Edit Settings					
Contact Information	Allow Editing				
Ship To Information	Allow Editing				
Bill To Information	Allow Editing				
Response Settings					
Response Attachments?	No	Are Suppliers allowed to add attachments?			
Supplier Retraction?	Yes	Are Suppliers allowed to retract responses?			
Weighted Evaluation?	No	Use weighted evaluation of responses?			
Show Maximum Score?	No	Display Maximum Score to Suppliers?			
Field Settings	Supplier Notes Displayed				
Document Availability Settings					
Bid Opportunity	Public - Available to All Suppliers				
Invitation Document	Public - Available to All Suppliers				
Bid Tabulation by Line	Public - Available to All Suppliers				
Bid Tabulation by Supplier	Public - Available to All Suppliers				
Award Summary Document	Public - Available to All Suppliers				

Figure 38. New Bid Type Set-Up

The available fields are:

- **Type Name** –Name given by the buyer during bid creation.
- **Display Name** – Displayed to the Suppliers. Also displayed in status column listings.
- **Description** – Description of the bid type.
- **Bid Security** – Three security types are available:
 - **Informal Quotation** – Suppliers cannot see any information beyond their own bid response. Buyers can see all information about supplier bid responses.
 - **Sealed Bid Request** – Suppliers cannot see any information beyond their own bid response. Buyers cannot see bid response information until the bid has Closed and is Unsealed. All Sealed Bid data is encrypted by the system until the bid closes and has been manually Unsealed by the buyer.
 - **Open RFX** (Reverse Auction) – Suppliers can see the current low price for requested items. Buyers have the ability to see all supplier bid response information.
- **Invitation Style** – Five invitation styles are available:
 - **Public- All Matching Suppliers** – A public bid request is available to all registered suppliers. The system will automatically notify and invite suppliers, by e-mail, if their registered commodity profile matches commodities assigned to line items within the bid request. Public invitations are available in the bid module only.
 - **Public – Invited Suppliers Only** – The bid opportunity is open to all active/registered suppliers. The system will only notify suppliers who have been manually invited by the buyer. Suppliers who have not been invited may view the bid opportunity in the Available Bids under “Other Bid Opportunities”.
 - **Private – All Matching Suppliers** – The bid event is not available to all registered/active suppliers. The system will automatically notify the suppliers by e-mail based on a matching commodity profile. The bid opportunity will not be located in the “Other Bid Opportunities” section.
 - **Private – Invited Suppliers Only** – The bid event is for invited suppliers only. Buyers must choose to invite suppliers from the “Active Suppliers” list. The bid opportunity will not be available in the “Other Bid Opportunity” section.
 - **Invitation Only** – An invitation only bid request will only be available to suppliers that are specifically invited using the Invitations function. The system will not send a bid event notification to any supplier who has not been manually invited.

Note: The invitation style will not override document settings. The bid opportunity is available for viewing from the login page by selecting the “Current Bid Opportunities” Link unless the bid opportunity document access level is set to online only. If you do not want the bid opportunity document and invitation document available to the public, the access level must be set to online only by going to documents and settings.

- **Invitation Display** – Two displays are available.
 - **Hide Participants** – A listing of invited suppliers will **not** be shown to suppliers accessing this bid request.
 - **Show Invited Suppliers** – Suppliers may view the list of invited suppliers.
- **Participants Display**
 - **Hide Participants** – A listing of participants will not be displayed to suppliers accessing the bid.
 - **Display Participants** – Suppliers may view the participants for a bid.
- **Event Numbering** – Select the numbering schema for a bid by choosing one of the predefined sequences which are set-up by the administrator.
- **Edit Settings** – Allow Editing, Select Only or Display Only. NOTE: These settings are generally set-up to work with specific integrations. It is recommended that they are not changed without consultation.
 - **Contact Information**
 - **Ship To Information**
 - **Bill To Information**
- **Response Settings**
 - **Response Attachments** – Specifies whether suppliers will be allowed to attach and submit external files with a bid response.
 - **Supplier Retractions** – Either allow or disallow suppliers to retract a bid response. Buyers are always able to retract a bid response for a supplier when necessary

- **Weighted Evaluation**
- **Show Maximum Score**
- **Field Settings**
 - **Supplier Notes** – Controls suppliers ability to enter and submit ‘Supplier Notes’ with a bid response
- **Document Availability Settings** – By setting the option, Buyers may set the option to display or hide the documents associated with the bid request on a report by report basis.
 - **Bid Opportunity** – Available setting options:
 - **Public – Available to All Suppliers** – Document will be available to suppliers logged into the system and externally available on the ‘Public’ bid listing - ‘Current Opportunities’ which is available at the login page.
 - **Online Only – Available Only to Online Suppliers** – The document will be available to suppliers logged into the system. The document will not be available on the external ‘Public’ bid listing.
 - **Invitation Document** – Available setting options:
 - **Public – Available to All Suppliers** – The document will be available to suppliers logged into the system and externally available on the ‘Public’ bid listing - ‘Current Opportunities’ which is available at the login page.
 - **Online Only – Available Only to Online Suppliers** – The document will be available to suppliers logged into the system. The document will not be available on the external ‘Public’ bid listing.
 - **Buyer Only** – The document will be available only to the buyer and system administrators.
 - **Bid Tabulation by Line Item Document** – (Spreadsheet) Available setting options
 - **Public – Available to All Suppliers** – The document will be available to suppliers who are logged into the system and externally available on the ‘Public’ bid listing - ‘Current Opportunities’ are available at the login page.
 - **Online Only – Available Only to Online Suppliers** – The document will be available to suppliers logged into the system. The document will not be available on the external ‘Public’ bid listing.
 - **Buyer Only** – The document will be available only to the buyer and system administrators.
 - **Bid Tabulation by Supplier Document** – (Spreadsheet) Available setting options
 - **Public – Available to All Suppliers** – The document will be available to suppliers logged into the system and externally available on the ‘Public’ bid listing - ‘Current Opportunities’ available at the login page.
 - **Online Only – Available Only to Online Suppliers** – The document will be available to suppliers logged into system. The document will not be available on the external ‘Public’ bid listing.
 - **Buyer Only** – The document will be available only to the buyer and system administrators.
 - **Award Summary Document** – Available setting options:
 - **Public – Available to All Suppliers** – The document will be available to suppliers logged into the system and externally available on the ‘Public’ bid listing - ‘Current Opportunities’ are available at the login page.
 - **Online Only – Available Only to Online Suppliers** –The document will be available to suppliers logged into the system. The document will not be available on the external ‘Public’ bid listing.
 - **Online - Buyer Only** –The document will be available only to the buyer and system administrators.

Note: *Individual Supplier Response Documents* are always available to the supplier once a bid response has been submitted. The Individual Supplier Response document is not available on a Sealed Bid response until the bid has been unsealed by the buyer

Enter a name and description for the Bid Type and the appropriate settings, click “Save” and the Bid Type will be available for use.

Bid Line Types

Bid Line types are used to define the characteristics of a line item and include the information buyers want returned with the supplier’s bid response. For instance, you may set up a line type that is specific to a service, and remove the Quantity, Manufacturer Name and Manufacturer Number fields. Also, you may set up line types that will either allow or not allow a supplier to submit alternate item responses. Setting up line types allows you to specify response requirements for all lines in that type.

The screenshot shows the 'Bid Line Types' configuration page. The navigation menu on the left includes 'Sourcing Configuration', 'Bid Management', and 'Auction Management'. The main content area is titled 'Bid Customization' and contains a table of bid line types.

Type Name	Display Name	Description	Default
<input type="checkbox"/> Commodity-Alts	Commodity		N
<input type="checkbox"/> Commodity-NoAlts	Commodity		N
<input type="checkbox"/> Service	Service		N
<input type="checkbox"/> PercentOff	Percent Off		N
<input type="checkbox"/> Service Unit	Service Unit		N
<input type="checkbox"/> PollAlts	Commodity		N
<input type="checkbox"/> Comm-Alts-NoNotes	Commodity		N
<input type="checkbox"/> Construction	Construction		N
<input type="checkbox"/> Const-Unit	Const-Unit		N
<input type="checkbox"/> Commodity-NoAltsNotes	Commodity	No Alternates or Supplier Notes are allowed.	Y
<input type="checkbox"/> Price Required	Price Required		N

Items 1-11 shown of 11

Figure 39. Bid Line Types

For each bid line type, you have the following options:

- **Type Name** – Choose from a drop down menu of line types.
- **Display Name** – Name to be displayed to suppliers and in the listing.
- **Description** – Text field describing the line type.

Unit List – Assign a predefined listing of acceptable Unit(s) of Measure. If a Unit List is assigned to this Event Line Type, the buyer will be required to select a unit of measure from the Unit List.

Home	Bids	Auctions	Contracts	Suppliers	Admin
System Administration		Sourcing Management		Contract Management Supplier Management	
New Bid Line Type					
<input type="button" value="Return"/> <input type="button" value="Save"/>					
* indicates a required field					
Type Name *	<input type="text"/>				
Display Name *	<input type="text"/>				
Description	<input type="text"/>				
Unit List	(No Unit List) <input type="button" value="v"/>				
Edit Settings					
Ship To Information	Allow Editing <input type="button" value="v"/>				
Bill To Information	Allow Editing <input type="button" value="v"/>				
Response Settings					
Allow Alternates?	Yes <input type="button" value="v"/>				
Response Type	Currency (US) <input type="button" value="v"/>				
Response Label	Price <input type="text"/>				
Response Ranking	Ascending <input type="button" value="v"/>				
Field Settings					
		<i>Specification</i>	<i>Alternate</i>		
Response		Optional <input type="button" value="v"/>			
Quantity		Displayed <input type="button" value="v"/>	Optional	<input type="button" value="v"/>	
Unit of Measure		Displayed <input type="button" value="v"/>	Optional	<input type="button" value="v"/>	
Description		Displayed <input type="button" value="v"/>	Optional	<input type="button" value="v"/>	
Manufacturer Name		Displayed <input type="button" value="v"/>	Optional	<input type="button" value="v"/>	
Manufacturer Number		Displayed <input type="button" value="v"/>	Optional	<input type="button" value="v"/>	
Supplier Notes		Displayed <input type="button" value="v"/>	Displayed	<input type="button" value="v"/>	
Default Setting	<i>Determines whether or not this line type is the default for new or imported Line Items.</i>				
Set as Default	<input type="radio"/> Yes <input checked="" type="radio"/> No				

Figure 40. Line Type Creation

Edit Settings

Ship to and Bill To Information provide the same settings options

- **Ship To Information**
- **Bill To Information**
 - **Allow Editing** – buyer users may edit address information as needed.
 - **Select Only** – buyer users must select from a predefined list of addresses.
 - **Display Only** – Address fields are automatic and may not be edited in any way.

Response Settings

- **Allow Alternates** – Choose to allow or not allow alternate bid responses for this line type.
- **Response Type** – The options available are:
 - **Currency** – All bid responses will be validated as currency
 - **Percentage** – All bid responses will be treated as a percentage, and events that contain percentage line items will not be ranked on the tabulation display.
- **Response Label** – Select the column-heading label that displays above the response fields.
- **Response Ranking** – Choose the response displays both online and in the bid tabulation spreadsheets by selecting either Ascending or Descending here.
 - **Ascending** – Lowest currency or percentage is considered the best bid. Display will sort Low to High.
 - **Descending** – Highest percentage or currency is considered the best bid. Display will sort High to Low.
 -

Field Settings

Field Settings support two primary functions:

Function 1: Field settings control the bid response containing alternate items. They allow you to specify what information will be allowed in a submitted bid response.

Function 2: Field settings enable the buyer to hide specified fields from displaying in a bid request. For example, if a line type does not require a manufacturer, the field settings provide the option to hide that field.

Each of the following fields can have the response requirements configured for both the specified item and for an alternate response, allowing you to gather more information for the alternate item if desired.

Response – *optional or required*

Quantity – *displayed or hidden*

Unit of Measure – *displayed or hidden*

Description – *display only*

Manufacturer Name – *displayed, optional, required or hidden*

Manufacturer Number – *displayed, optional, required or hidden*

Supplier Notes – *displayed or hidden*

If your bid line type allows alternates, the field settings for the alternate column must be set to required for the vendor response to work properly. The exception is supplier notes. This field may be displayed or hidden.

Response Requirement Definitions:

- **Required** – *The supplier will be required by the system to enter their alternate information for this field.*
 - **Optional** – *The supplier will retain the option to enter their alternate information for this field.*
 - **Hidden** – *Field is hidden for this line type as no value will exist.*
- **Default Setting** - Determines whether or not this line type is the default for new or imported Line Items.

Home	Bids	Auctions	Contracts	Suppliers	Admin
System Administration		Sourcing Management		Contract Management	Supplier Management

Edit Bid Line Type

[Return](#) [Save](#)
** indicates a required field*

Type Name *
Display Name *
Description
Unit List

Edit Settings
Ship To Information
Bill To Information

Response Settings
Allow Alternates?
Response Type
Response Label
Response Ranking

Field Settings	Specification	Alternate
Response	<input type="text" value="Optional"/>	
Quantity	<input type="text" value="Displayed"/>	<input type="text" value="Required"/>
Unit of Measure	<input type="text" value="Displayed"/>	<input type="text" value="Required"/>
Description	<input type="text" value="Displayed"/>	<input type="text" value="Required"/>
Manufacturer Name	<input type="text" value="Displayed"/>	<input type="text" value="Required"/>
Manufacturer Number	<input type="text" value="Displayed"/>	<input type="text" value="Required"/>
Supplier Notes	<input type="text" value="Displayed"/>	<input type="text" value="Displayed"/>

Default Setting *Determines whether or not this line type is the default for new or imported Line Items.*
Set as Default Yes No

Figure 41. Event Line Type Settings (line level editing)

Supplier Management

Supplier Scoring - Establishing Criteria

Each buying organization views supplier performance differently. Scoring metrics and criteria values can be established providing your organization with the ability to evaluate supplier performance over time. Criteria and weight values can be established within Sourcing. Upon the completion of a term contract or order fulfillment buyers can enter their perceived value of the supplier's performance. Over time the system will calculate and display the supplier's average score based on a 0 – 10 scale. Even though the system averages supplier scores based on a 0 –10 scale, you may establish a criteria's weight to be more valuable than other criteria.



Supplier Scoring Criteria		
*New Edit Delete		
Criteria	Description	Weight
<input type="checkbox"/> Delivery	Timely Delivery	20
<input type="checkbox"/> As Spec	Were the items what you thought you were getting?	20
<input type="checkbox"/> Support	Product/Technical Support	10
<input type="checkbox"/> Problem Resolution		10
<input type="checkbox"/> Availability of Contact	Can I get in touch with my contact person in a timely manner.	10

Items 1-5 shown of 5 1

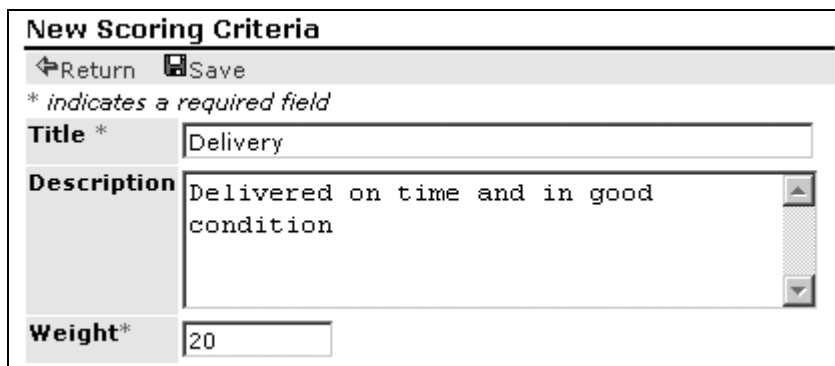
Figure 42. Scoring Criteria

The way you choose to score your suppliers is completely up to you, and each criterion can be given a different weight. The weight denotes the importance of the score they receive, which in turn affects the cumulative score given for the event.

Scorecards are made available at the completion of the award process and posted to the Pending Supplier Scoring section located in the Pending Suppliers sub-tab. Scorecards are generated at the time an event is issued so it is important to add any criteria that you intend to measure and grade supplier performance **before** you issue a bid request. Scores are the reflection of only the criteria you scored a supplier on, so any that don't apply to a given event can be disregarded with no affect on the over-all score.

New Scoring Criteria

Select the "Admin" tab; select the 'Company Management' sub-tab, and then the 'Scoring Criteria' tab on the tab-strip. To begin the process of creating new scoring criteria, select the 'New' menu option. You will then be presented with the New Scoring Criteria creation screen.



New Scoring Criteria

Return Save

* indicates a required field

Title * Delivery

Description Delivered on time and in good condition

Weight* 20

Figure 43. New Scoring Criteria Creation Screen

The Scoring Criteria set up consists of the following fields.

- **Title** – This is the name that will display in the scorecard.
- **Description** – The description field displays an explanation of the scoring criteria.

- **Weight** – This is the value you give to the criteria in relation to all scoring criteria categories. If a specific criterion is of more value to you, give it a higher weight in comparison to other criteria that are scored. The weight can be any number you choose, but it will be averaged to a value of 1 to 10 for comparison purposes.

When you have finished entering the information for the scoring criteria, click ‘Save’ and the criteria will be added to the scorecards of all events that are issued after the creation of this one.

Manual Scoring

A manual score can be used to ‘grade’ a one time event that is not tied to a specific event. By selecting the ‘New’ button on the Pending Supplier Scores menu bar on the ‘Score’ tab, you can add in a score that is not tied to a specific event. The score you give the user will be added to their cumulative score that is displayed throughout the system.

The screenshot shows the 'Supplier Scoring Criteria' configuration page. The page has a navigation bar at the top with 'Admin' selected. Below the navigation bar, there are tabs for 'Supplier Scoring' and 'Insurance Types'. The main content area is titled 'Supplier Scoring Criteria' and includes a table of criteria. The table has three columns: 'Criteria', 'Description', and 'Weight'. The criteria listed are:

Criteria	Description	Weight
<input type="checkbox"/> Quality of Goods		100
<input type="checkbox"/> Delivery Timeliness		75
<input type="checkbox"/> Customer Service		100
<input type="checkbox"/> Safety		150
<input type="checkbox"/> On Time and On Budget	explain	150
<input type="checkbox"/> Service Completion and Budget	Services were completed on time and on budget	100

At the bottom of the table, it says 'Items 1-6 shown of 6'.

Figure 44. Manual Scoring

This can be useful if new criteria have been added after the bidding event was issued and was not included in the original scorecard for that event. You can add the new criteria and then create a manual scorecard and respond to those criteria.

Administrators How-To Guide (Quick-Reference)

Create New Users (Buyer Side)

1. Select the 'Admin' tab
2. Select the 'System Administration' sub-tab
3. On the user tab in the middle of the screen, select 'New'
4. Enter required user information (User name, first name, last name, email address)
5. To ensure times will display in the users local time zone, enter the **user's** time zone.
6. Enter and confirm a password for the user.
7. Select Save
8. Selecting Return navigates to the previous page **without** saving.
9. Every user must have at least one role, and a role that is set to the default.

Assign Roles

1. Login and select the Admin tab
2. Select "System Administration"
3. Select the user from the list of users on the 'User' tab.
4. Select 'Edit'
5. Select 'Roles' above the user information.
6. Select the role to be assigned to the user by using the drop down list on the right side of the page.
7. Select 'Add'. (Repeat as desired)
8. Select the primary role for the user
9. Select the 'Default' button.
NOTE: All users must be assigned a default role. New users will automatically be assigned the default role of "General Access.". Should that role be deleted, you must select another role as the default for the user to login.
10. When you are done, select 'Return'.
11. Select 'Return' again to return to the main Users listing.

Change Buyer User's Password

1. Login and select the Admin tab
2. Select "System Administration"
3. Select the user from the list of users on the 'User' tab
4. Select 'Edit'
5. Enter a new password in the 'New Password' field
6. Confirm the password
7. Select 'Save'
8. To exit without changing the password, click 'Return'
9. Exiting without entering a new password will also allow you to leave the account without changing the user's password.

Reset Supplier Password

1. Login and select the Supplier tab
2. Select All Suppliers
3. Locate the supplier account in the listing and select 'Edit'
4. Select the 'Users' tab
5. Select the correct user
6. Select 'Reset Password'
7. Enter the email address the password should be sent to if it is different than the one listed
8. Enter a reason for resetting the password if needed
9. Select the 'Reactivate Account' box if the supplier has exceeded the maximum attempts to login

Correct Supplier Login Error

1. Login and select the Supplier tab
2. Select All Suppliers
3. Locate the supplier account in the listing and select 'Edit'
4. Select the 'Users' tab
5. Select the correct user
6. Select 'Reset Password'
7. Select the 'Reactivate Account' box
8. Select 'Save'
9. The supplier will receive an email with a temporary password that allows them to log in.

Set-Up Auto-Event Numbering

1. Select the 'Admin' tab
2. Select "Sourcing Management"
3. Select "Event customization"
4. Select 'Event Numbering' from the tab strip in the middle of the page.
5. Select 'New'
6. Enter a Description of the Event Numbering schema being created.
7. Select 'Save'.
8. New controls will appear on the page below the Description field under the heading of 'Event Numbering Elements'.
9. Select 'New' to create a new element.
10. Select the type of data the new element will contain (text, auto number, date(year) or date(month) and the current value for the element.
11. Save
12. Continue to create new elements.
13. The 'Example' field displays a preview of the event numbering schema
14. When finished, select 'Return'.

Create New Bid Type

1. Select 'Admin' tab.
2. Select 'Sourcing Management' sub-tab
3. Select "Bid Customization" located under Bid Management in the shaded quick link box at the left of the screen.
4. Select 'Bid Types'
5. Select the 'New'
6. Enter the following information
 - a. Type Name – Displayed in the buyer's drop down menu
 - b. Display Name – Displayed to suppliers and in listings
 - c. Description
 - d. Bid Security
 - Informal – Buyer can see submitted pricing before bid close
 - Sealed – All response info is encrypted until after the bid is closed and unsealed.
 - Open – Buyers can see all submitted bid information and bidders can see the current best pricing.
 - e. Invitation Style
 - **Public- All Matching Suppliers** – A public bid request is available to all registered suppliers. The system will automatically notify and invite suppliers, by e-mail, if their registered commodity profile matches commodities assigned to line items within the bid request. Public invitations are available in the bid module only.
 - **Public – Invited Suppliers Only** – The bid opportunity is open to all active/registered suppliers. The system will only notify suppliers who have been manually invited by the buyer. Suppliers who have not been invited may view the bid opportunity in the Available Bids under "Other Bid Opportunities".
 - **Private – All Matching Suppliers** – The bid event is not available to all registered/active suppliers. The system will automatically notify the suppliers by e-mail based on a matching commodity profile. The bid opportunity will not be located in the "Other Bid Opportunities" section.

- **Private – Invited Suppliers Only** – The bid event is for invited suppliers only. Buyers must choose to invite suppliers from the “Active Suppliers” list. The bid opportunity will not be available in the “Other Bid Opportunity” section.
- **Invitation Only** – An invitation only bid request will only be available to suppliers that are specifically invited using the Invitations function. The system will not send a bid event notification to any supplier who has not been manually invited.
- **The invitation style will not override document settings. The bid opportunity is available for viewing from the login page by selecting the “Current Bid Opportunities” Link unless the bid opportunity document access level is set to online only. If you do not want the bid opportunity document and invitation document available to the public, the access level must be set to online only by going to documents and settings.**
- f. Invitation Display
 - Hide Invitees – only the buyer can view the list of invited suppliers.
 - Show Invited Suppliers – All suppliers can view the list of invited suppliers.
- g. Participants Display – Display or hide the participants.
- h. Event Numbering – Select an event numbering schema to be applied to the bid type.
- i. Edit Settings – you may “allow editing”, “select only” or “display only” for the following three information fields.
 - Contact Information
 - Ship To Information
 - Bill To Information
- j. Response Settings – the following fields allow you to choose “yes” or “no”
 - Response Attachments – Suppliers may upload an attachment with their bid response (Yes or No)
 - Supplier Retraction – Suppliers may retract their submitted bid response (Yes or No)
 - Weighted Evaluation
 - Show Maximum Score
 - Field Settings – Setting is for supplier notes. You can choose to allow or suppress the supplier’s ability to enter notes.
- k. Document Availability Settings – The following documents allow the following Settings:
 - Public – Available to all suppliers
 - Online Only – Available only to online suppliers
 - Buyer Only – Available only to buyer
 - Bid Opportunity Document – Display or list to suppliers before login or require login to view
 - Invitation Document – Publish the invitation document or require login
 - Bid Tabulation by Line Item Document – Bid response of all suppliers participating
 - Bid Tabulation by Supplier Document – Supplier bid response
 - Award Summary – Suppliers and award totals

When complete click “Save”. Use “Edit” to modify an event type.

Create a New Line Type

1. Select the ‘Admin’ tab
2. Select ‘Sourcing Management’ from the sub-tabs.
3. Select the Bid Customization link from the shaded text box at the left of the screen.
4. Select ‘Bid Line Types’
5. Select ‘New’ under either the Bid Request or Auctions heading.
6. Enter desired Type Name – Displayed to buyers when recreating the line item.
7. Enter desired Display Name – Displayed to suppliers and in listings.
8. Enter a description for the new bid line type
9. Unit List – provides a list of approved units of measure.

Edit Settings - The “Bill To” and “Ship To” addresses provide the following settings

- **Allow Editing** – buyer users may edit address information as needed.
- **Select Only** – buyer users must select from a predefined list of addresses.
- **Display Only** – Address fields are automatic and may not be edited in any way.

Response Settings

10. Allow Alternates? Select either 'Yes' or 'No'.
11. Response type – Currency or Percentages?
12. Response Label. The response 'column' heading displayed for this field.
13. Response Ranking – Ascending or Descending – Displays from the highest to the lowest or from lowest to highest on tabulation screens or documents
14. **Field Settings** The following fields affect alternate item responses. They also control whether the display of the field is present, required or optional in a bid response for an alternate item.
 - a. Response
 - b. Quantity
 - c. Unit of Measure
 - d. Description
 - e. Manufacturer Name
 - f. Manufacturer Number
 - g. Supplier Notes
15. Set as Default.
16. Select 'Yes' to make the line type the default for any bulk loaded or imported item.
17. Select "Save"

Create an Attribute Category

1. Select the 'Admin' tab.
2. Select the 'Sourcing Management' sub-tab.
3. Select the 'Attribute Library' sub-tab...
4. Select 'New' under the 'Attribute Categories' heading.
5. Enter the name of the new category and description of the new attribute category
6. Select 'Save'

Rename an Attribute Category

1. Select on the 'Admin' tab.
2. Select the 'Sourcing Management' sub-tab.
3. Select the 'Attribute Library' sub-tab
4. Checkmark the box beside the name of the category to be renamed
5. Select the 'Rename' button.
6. Enter the new category name and description
7. Select 'Save'

Create Attribute Types in the Attribute Library

This can be done either at the bid level, or the line level. The same process is used to add an attribute to the Attribute Library, and that is accessed by selecting the 'Admin' tab, the 'Sourcing Management' sub-tab and the 'Attribute Library' tab.

Select the category to which the new attribute will be added.

Select 'Edit'

See below to add the following "new" attribute types.

Short Text Attributes

Short text attributes allow the supplier to enter a short, free-form text response to information posted by or a question asked by the buyer.

1. Select 'Short Text' from the 'New' drop down box.
2. Select the category to which the new attribute will belong by using the pull-down menu..
3. Enter the name for the attribute.
4. Use the note field to present information, make a conditional statement, or ask a question. The Supplier will be presented with a small text box to enter a response.

5. Enter a response type.
 - a. Optional – Supplier may respond to the attribute statement/question.
 - b. Required – Supplier must respond to the attribute statement/question.
6. Select 'Save'
7. Select another attribute type to create more attributes, or 'Return' to finish.

Long Text Attributes

Long text attributes allow the supplier to enter a long, free-from text response to a question asked by or information posted by the buyer.

1. Select 'Long Text' from the 'New' drop down box.
2. Select the category to which the new attribute will belong by using the pull-down menu.
3. Enter the attribute name
4. Use the note field to present information, make a conditional statement, or ask a question.
5. Enter a response type.
 - a. Optional – Supplier may respond to the attribute statement/question.
 - b. Required – Supplier must respond to the attribute statement/question.
6. Select 'Save'
7. Select another attribute type to create more attributes, or 'Return' to finish.

Note Attributes

A Note attribute is strictly for passing information. The information can either be displayed to the supplier, or held where only the buyer can see it. Responses are not allowed for Note attributes.

1. Select 'Note' from the 'New' drop down box.
2. Select the category you want the new attribute to belong to if you are adding it to the Attribute Library.
3. Enter the name for the attribute.
4. Use the note field to present information, make a conditional statement, or ask a question.
5. Select a display option
 - a. Display – Information will be displayed to all buyers and suppliers who view the bid.
 - b. Buyer Only – Only the buyers will be able to see the information contained in the attribute.
6. Select 'Save'.
7. Select another attribute type to create more attributes, or 'Return' to finish.

Numeric Attributes

A Numeric attribute response is validated to ensure that it contains only numeric data when the supplier submits the response.

1. Select 'Numeric' from the 'New' drop down list.
2. Select the category to which the new attribute will belong if adding it to the Attribute Library.
3. Enter the name for the attribute.
4. Use the note field to present information, make a conditional statement, or ask a question.
5. Enter a response type.
 - a. Optional – Supplier may respond to the attribute statement/question.
 - b. Required – Supplier must respond to the attribute statement/question.
6. Select 'Save'
7. Select another attribute type to create more attributes, or 'Return' to finish.

Percentage Attributes

A Percentage attribute is validated at submission to insure that the response given by the supplier is a number and one that can be displayed in a percentage format.

1. Select 'Percentage' from the 'New' drop down list.
2. Select the category to which the new attribute will belong if adding to the Attribute Library.
3. Enter a name for the attribute
4. Use the note field to present information, make a conditional statement, or ask a question.
5. Enter a response type.
 - a. Optional – Supplier may respond to the attribute statement/question.
 - b. Required – Supplier must respond to the attribute statement/question.

6. Select 'Save'
7. Select another attribute type to create more attributes, or 'Return' to finish.

List of Values

A list of values is used when a limited list of possible bidder responses is being considered or accepted. Much like a multiple-choice question, the List of Values attribute enables buyers to present a question and include a list of potential acceptable answers. Suppliers select and respond using the list of possible answers.

1. Select 'List of Values' from the 'New' drop down list.
2. Select the category to which the new attribute will belong if adding to the Attribute Library.
3. Enter a name for the attribute
4. Use the note field to present information, make a conditional statement, or ask a question.
5. Enter a response type.
 - a. Optional – Supplier may respond to the attribute statement/question.
 - b. Required – Supplier must respond to the attribute statement/question.
6. Select 'Save'
7. In the lower section of the screen, a new heading will appear reading 'Attribute Values'.
8. Select 'New'
9. Select the Display Value – Text displayed in the drop box presented to suppliers.
10. Enter a Value – If this value is selected by the supplier, the application will record this value as the supplier's response. Value to be recorded and presented in bid tabulation reports.
11. Select 'Save'
12. Select 'New' to add another item to the list of values.
13. Select one of the items in the list as a 'Default'
14. Select 'Return' when finished
15. Select another attribute type to create more attributes, or 'Return' to finish.

List of Values with a Required Response

The default answer value will be displayed as the supplier's selected value. (Even if the supplier ignores the attribute) Whatever answer value is set as the default, the system will automatically record that value as the supplier's answer when the bid is submitted.

Avoid this by creating a null (answer) value as the default with the following characteristics:

Name of Attribute: example – "Please select one" or "Choose One"

Note field: example – leave this field blank

Required: Yes

Default – Set this "null" value answer as the default for the list of values.

Checkbox

Checkboxes are generally used to indicate a yes/no; agree/disagree; can/cannot answer to a question.

1. Select 'Checkbox' from the 'New' drop down menu.
2. Select the category to which the new attribute will belong if adding to the Attribute Library.
3. Enter a name for the attribute
4. Use the note field to present information, make a conditional statement, or ask a question.
5. Enter a response type.
 - a. Optional – Supplier may respond to the attribute statement/question.
 - b. Required – Supplier must respond to the attribute statement/question.
6. Enter a 'Display Value'. Text displayed next to the checkbox indicating the supplier's response. (Yes, I agree, or I can)
7. Enter the 'Value'. If the box is checked, the application will record this value as the supplier's response. Value to be recorded and presented in bid tabulation reports.
8. Select 'Save'.
9. Select a new attribute type
10. Select 'Return' when finished

Display Value

This attribute type is used to display information, either to the supplier or to the buyer. No responses can be made to an attribute of this type.

1. Select 'Display Value' from the 'New' drop down menu
2. Select the category you want the new attribute to belong to if you are adding it to the Attribute Library.
3. Enter a name for the attribute
4. Use the note field to present information.
5. Select the 'Display Value' that best suits your needs:
 - a. Display – Text displayed to suppliers.
 - b. Buyer Display – Text displayed only to the buyer(s).
6. Enter the 'Value'. The application will record this value and associate it with your note. Value will be recorded and presented in bid tabulation reports.
7. Select 'Save'
8. Select a new attribute type to continue adding attributes
9. Select 'Return' when finished.

URL

Use the attribute type to request that suppliers respond with a web-site address. Presenting a web address to suppliers is usually done using a Display Value or Note attribute.

1. Select 'URL' from the 'New' drop down menu.
2. Select the category to which the new attribute will belong if adding to the Attribute Library.
3. Enter a name for the Attribute.
4. Use the note field to present information, make a conditional statement, or ask a question.
5. Enter a response type.
 - a. Optional – Supplier may respond to the attribute statement/question with a URL.
 - b. Required – Supplier must respond to the attribute statement/question with a URL.
6. Select 'Save'
7. Select a new attribute type to continue adding attributes.
8. Select 'Return' when finished.

Currency

The currency attribute is used when requesting a supplier response with a dollar amount. All responses will be validated to ensure that the entered response is numeric for the currency format. Only USD currency is accepted.

1. Select 'Currency' from the 'New' drop down menu
2. Select the category to which the new attribute will belong if adding to the Attribute Library.
3. Enter a name for the attribute.
4. Use the note field to present information, make a conditional statement, or ask a question.
5. Enter a response type.
 - a. Optional – Supplier may respond to the attribute statement/question.
 - b. Required – Supplier must respond to the attribute statement/question.
6. Select 'Save'.
7. Select a new attribute type to continue adding attributes.
8. Select 'Return' when finished.

Date

A date attribute is used when requesting a supplier respond with a date. All responses are validated to ensure that the entered response is in date format. mm/dd/yyyy is the accepted format.

1. Select 'Date' from the 'New' drop down menu.
2. Select the category to which the new attribute will belong if adding to the Attribute Library.
3. Enter a name for the attribute.
4. Use the note field to present information, make a conditional statement, or ask a question.
5. Enter a response type.
 - a. Optional – Supplier may respond to the attribute statement/question.
 - b. Required – Supplier must respond to the attribute statement/question.
6. Select 'Save'

7. Select a new attribute type if adding attributes
8. Select 'Return' when finished.

Custom

The functionality is not available at this time.

Create Bidders List

A bidders list is a logical grouping of bidders.

1. Select the 'Suppliers' tab
2. Select the 'Bidders Lists' sub-tab.
3. Select 'New'
4. Enter a list name for
5. Select 'Save'
6. Select suppliers from the "All Suppliers" list to be added to the newly labeled List.
7. Select the 'Add' button.
8. 'Add' and 'Remove suppliers until the bidders list is complete.
9. Select 'Return' when finished.

Extract a List

Extracts can be performed on the Active Suppliers list, Bidder's Lists & Classifications Lists (Commodities & Special Classifications).

1. Go to the Suppliers tab
2. Choose All Suppliers
3. Choose Extract
4. Choose the Tab-Delimited Vendor Extract link from the list.
5. A pop-up window will display, when processing is complete, right click the word "here".
6. Choose "Save Target As" from the list.
7. Name the file and save it to a desktop or other folder.
8. Choose "Open".
9. Go to the newly named file and right click.
10. Choose "Open With" from the menu
11. Choose the Excel option.
12. Save the Excel file

Once you save the file, it can be used like any other Excel file.

Offline Supplier – Create an Account

1. Select 'Suppliers' tab
2. Select 'All Suppliers' sub-tab.
3. Select the 'New' button
4. Enter the Supplier account information.
5. Select 'Save'

Offline Supplier – Change to an Active Supplier

Change an offline supplier to an active supplier by creating a user account.

1. Select 'Suppliers' tab
2. Select 'All Suppliers' sub-tab.
3. Select the desired Offline Supplier.
4. Select the 'Activate/Inactivate' button
5. Enter the supplier user information and Activation Reason
6. Select 'Save'
7. The Supplier will receive an email confirming account activation and a temporary password. They will be prompted to change the password the first time they login.

Manual Bid Response Entry from an...

Invited Supplier and Invited Offline Supplier

A manual response can be entered for a supplier submitting a paper bid.

1. Login,
2. Select Bids
3. Select Closed
4. Select the desired bid request number. (MUST be Unsealed)
5. Select the 'Status' button.
6. Select the 'Responses' tab in the tab-strip in the middle of the page.
7. Select the supplier from the list and click 'Respond'.
8. Select the supplier's responses to questions and pricing.
9. Select 'Submit'
10. If the bid response was received and is missing required answers (attributes), administrators may turn off the system validation by selecting the 'Validation Off' button and then selecting 'Submit'.

Un-invited Supplier and Un-invited Offline Supplier

If the supplier was not invited to the bid event before it closed, use the following process to add an offline bid.

1. Login
2. Select Bids
3. Select Closed
4. Select the desired bid request number. (MUST be Unsealed)
5. Select the 'Status' button.
6. Select the 'Responses' tab in the tab-strip in the middle of the page.
7. Under the 'Unsubmitted Supplier Responses' heading, select 'New'
8. Select the supplier from the list and choose 'Select'.
9. Enter the supplier's responses to questions and pricing.
10. Select 'Submit'
11. If the bid response was received and is missing required answers (attributes), you can turn off the system validation by selecting the 'Validation Off' button and then selecting 'Submit'.

Unsubmitted Responses

The same process can be used if the supplier entered and "saved" a response but did not submit the response online. (It is assumed that the supplier submitted the response offline using the proper channels and the response was properly documented and time stamped)

1. Select the supplier from the 'Unsubmitted Response' listing
2. Select 'Edit'.
3. Select 'Submit'

Any Off-line responses will be flagged with a 'Manual' tag that indicates that you are holding paperwork that confirms a properly submitted manual response. An 'Edited' tag indicates you submitted an unsubmitted response on behalf of a supplier.

Audit trails will show that the response was entered or submitted by you or another buyer/administrator. (It is assumed that the supplier submitted the response offline using the proper channels and the response was properly documented and time stamped)

Edit Existing Supplier Response

1. Login,
2. Select Bids,
3. Select Closed
4. Select the desired bid request number. (MUST be Unsealed)
5. Select the 'Status' button.
6. Select the 'Responses' tab in the tab-strip in the middle of the page.

7. Select the 'Admin Unsubmit' button under the 'Submitted Supplier Responses' heading,
8. Make the required changes to the supplier's response.
9. Select 'Submit'.

Audit trails will show that the response was entered or submitted by you. (It is assumed that the supplier submitted the response offline using the proper channels and the response was properly documented and time stamped)

Table of Figures

Figure 1. Sorting Lists.....	5
Figure 2. Menu bar display on a list.....	5
Figure 3. Menu bar display within a page.....	5
Figure 4. Pagination bar example.....	5
Figure 5. Page number bar example.....	5
Figure 6. Home Page.....	6
Figure 7. Suppliers Menu.....	6
Figure 8. Pending Suppliers Page.....	7
Figure 9. InactiveUsers/Suppliers.....	7
Figure 10.....	8
Figure 11. Special classification activation or edit screen.....	8
Figure 12. Pending supplier scores.....	9
Figure 13. Edit Supplier Event Scoring.....	10
Figure 15. All Supplier Listing.....	10
Figure 16. Add a new supplier.....	11
Figure 17. Supplier Maintenance (Edit Profile Page).....	12
Figure 18. Supplier Reset Password screen.....	13
Figure 19. Login Error Message.....	14
Figure 20. Activity Page.....	15
Figure 21. Supplier Audit History.....	16
Figure 22. New Message Screen.....	16
Figure 23. High Priority Message.....	17
Figure 24. List of Bidders Lists.....	18
Figure 25. Bidders List Maintenance.....	18
Figure 26. Special Classifications and Commodities.....	19
Figure 27. Edit Special Classification Screen.....	20
Figure 28. System Administration.....	21
Figure 29. Add User.....	22
Figure 30. Edit User Profile.....	23
Figure 31. User Roles.....	24
Figure 32. Category and Commodity Management Screen.....	28
Figure 33. Commodity Creation Screen.....	29
Figure 34. Existing Commodity Edit.....	29
Figure 35. Attribute Category Creation.....	30
Figure 36. Event Numbering Sequences.....	31
Figure 37. Event Numbering Elements.....	31
Figure 38. Template Promotion.....	32
Figure 39. New Bid Type Set-Up.....	33
Figure 40. Bid Line Types.....	36
Figure 41. Line Type Creation.....	37
Figure 42. Event Line Type Settings (line level editing).....	39
Figure 43. Scoring Criteria.....	40
Figure 44. New Scoring Criteria Creation Screen.....	40
Figure 45. Manual Scoring.....	41