USER GUIDE

How to Create a Tender

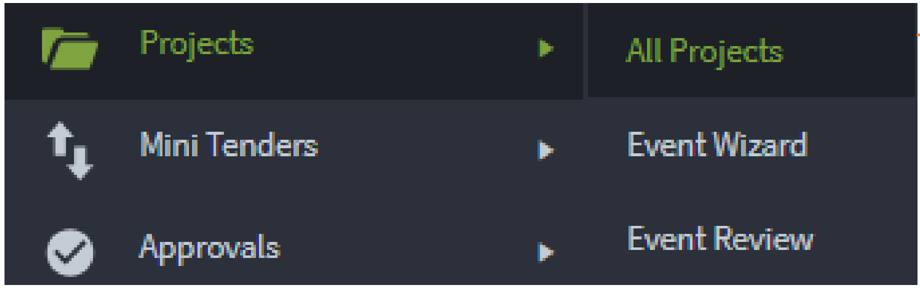
Tenders are central to procurement and form a crucial part of the Source to Contract cycle. This guide will walk you through:

- » How to initially create a tender
- » The different tabs that make up a tender
- » How to form a questionnaire
- » How to invite your supplier

Note: The terminology used here may be different to that in your system due to customisations. However, the core processes remain the same.

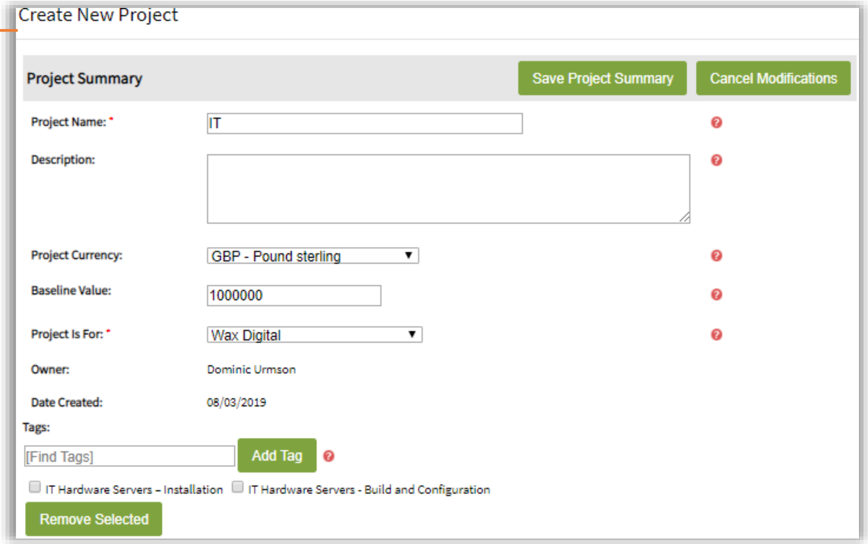
How to Create a Tender

Your events must be contained in a project folder. This helps to organise all of your system events and so before creating a tender, you must first create a project folder. To do so, follow the steps below:



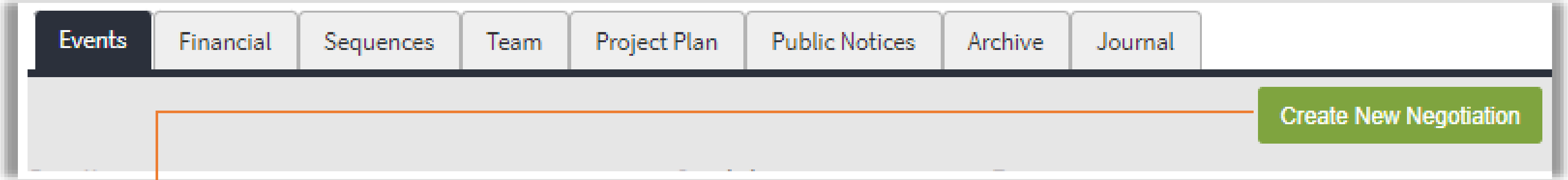
1 Select the **All Projects** menu option.

2 Click **Add New Project** on the main top-level folder page, or click into a folder where you want to store multiple projects and click then select **Add New Project**



3

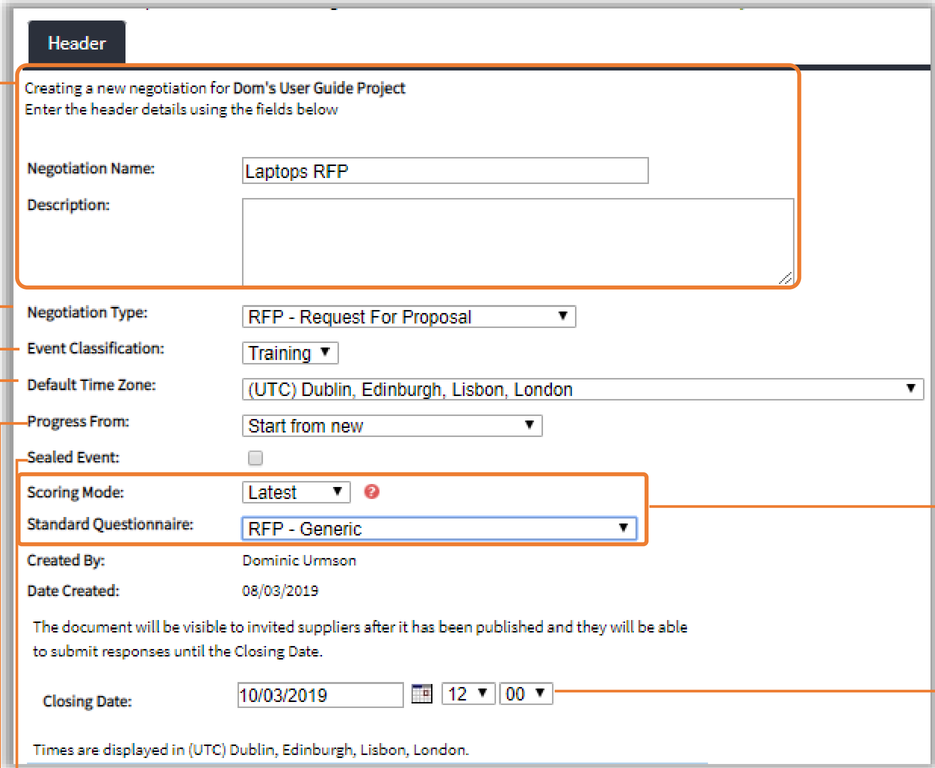
Enter the following for the **Project Setup**:
Project Name: A clear name to define what the events in the project are for.
Description: Further clarity of the project.
Currency: The default currency for the events in the project.
Baseline Value: The expected total value for the project.
Project For: Which organisation or business unit this project is for.
Tags: You can associate any number of tags to the project for reporting purposes.
Once complete click **Save Project Summary**.



4

Having either created your project or selected an existing project, click the **Create New Negotiation** button from with the Events tab of a project.

The next step is to **enter header information** for the tender. Follow the steps below to do this:



1 Enter a clear **Negotiation Name** and **Description** that clearly describe what the tender is for.

2 Select the **Negotiation Type** you wish to create. If you began this tender from a dashboard quick link then this field will already be populated.

3 Select whether this event is a **Live, Test** or **Training** event. This helps to differentiate your live and dummy date when reporting.

4 Choose the **Default Time Zone** for the tender. This is particularly important for tenders involving suppliers from multiple time zones.

5 Select whether you want the tender to carry on from a previous event, or whether it should be a stand-alone event.

6 Select whether you wish the event to be **sealed**, with only nominated users able to access the tender responses after the tender close date.

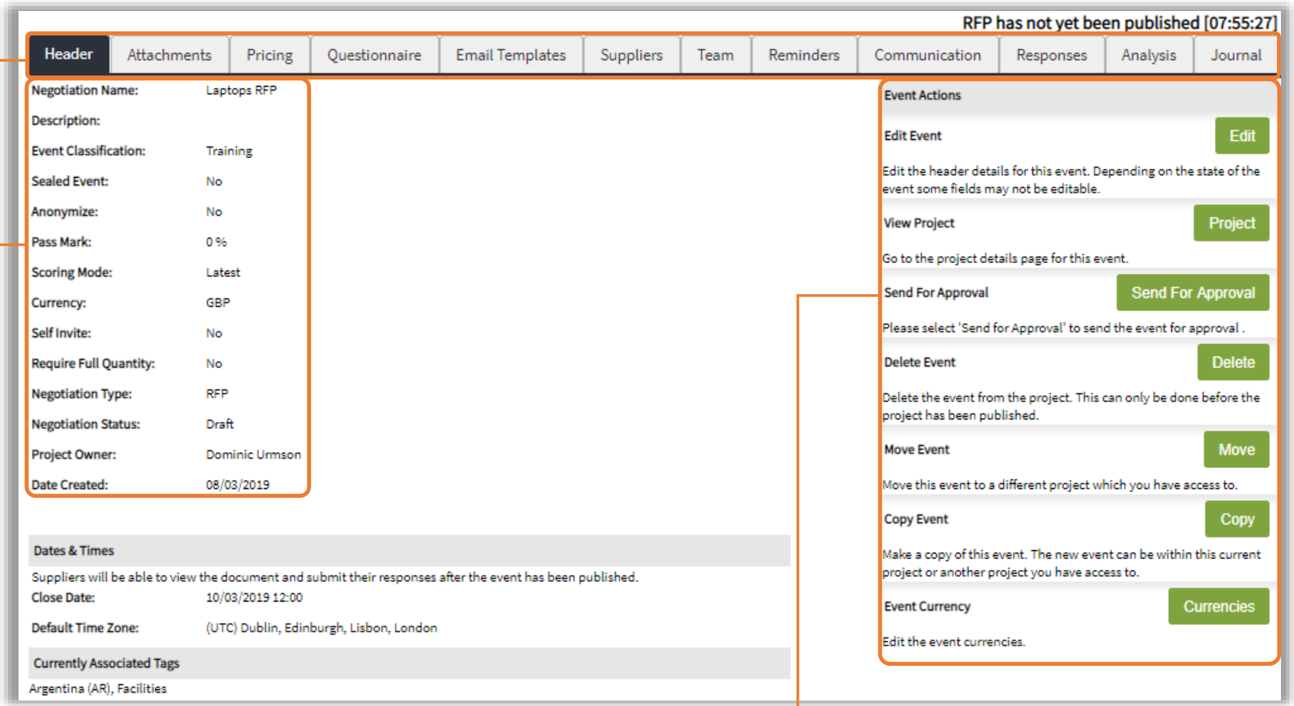
7 Select the **Scoring Mode** you wish to adopt for the tender and, if you wish to, select a Standard Questionnaire.

8 Choose the **Closing Date** for when all suppliers must have submitted their tender responses.

9 Finally, click the **Save Negotiation** to create the tender in its initial stage.

Once the tender has been created, you will be taken to the **Header tab** with the following options available:

1 The **tabs bar** allows access to all other areas of the tender by simply clicking the tab.



2 The **Header** tab provides the basic top-level information for the event including: **Event Name**, **Description**, **Type**, **Status**, **Creator** etc.

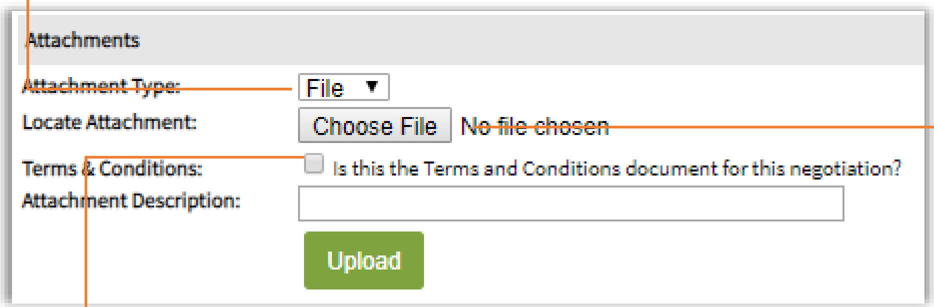
3 Different **Actions** can be performed to the event at different statuses along the tender's lifecycle. These actions are always available to the right of the screen with a description to explain what the action does.

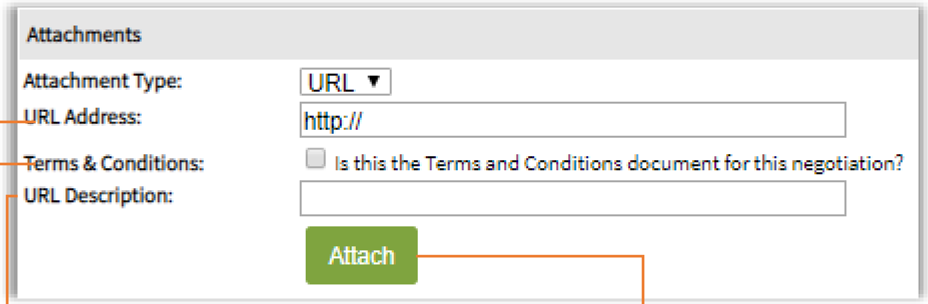
How to Use the Attachments Tab

The **Attachments tab** allows you to include documents in the tender that can be made visible to both the supplier and buyer, or just the buyer. To upload an attachment that is visible to **both the supplier and buyer**, follow the instructions below:

1 Select the attachment type from **File Upload** or **URL Link**.

2 Either locate the file OR enter the URL into the available box.





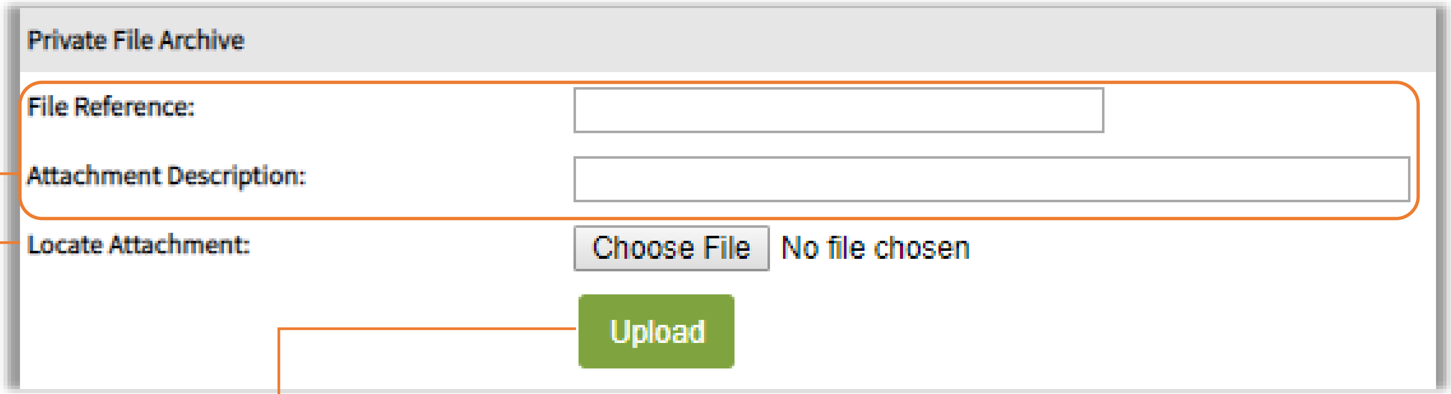
3 Tick the box if this document or URL is the terms and conditions document for the tender and so the supplier has to accept they have acknowledged this document before they can respond to the tender.

4 Add a **Description** that clearly defines the attachment.

5 Click **Attach** once all of the information is correct. The attachment will now appear in the Attachment tab.

If you want to upload an attachment that only the buyers see, then follow the instructions below:

1 Enter a **File Reference** and **Description** that describe clearly what the file is.



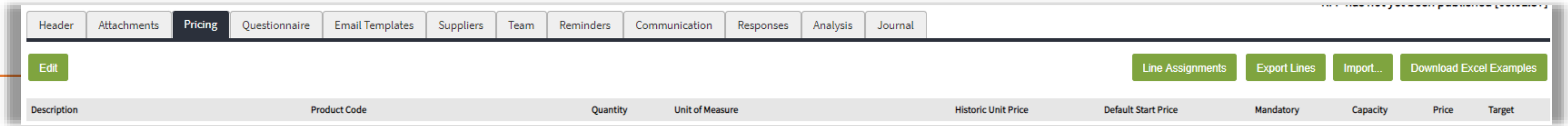
2 Locate the file for upload.

3 Click **Upload**. The attachment will now be visible in the Attachment tab to all buyers who have access to the tender.

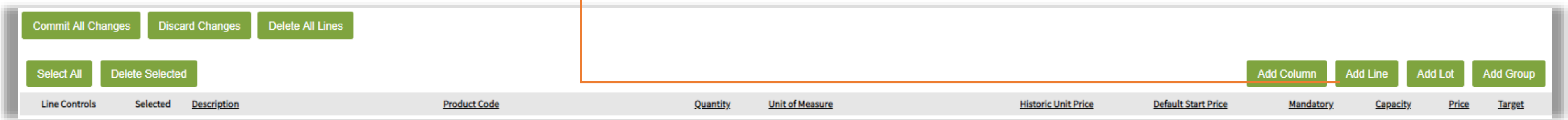
How to Use the Lines Tab

The **Lines tab** is an integral part of building your tender, and is where you build the lines, lots and groups for which you are going to tender for. Lines can be added as stand-alone items, as part of a lot including other lines, or grouped together to form a group. To create a stand-alone line, follow the instructions below:

1 Click the **Edit** button to activate the line, lot and group creation options.



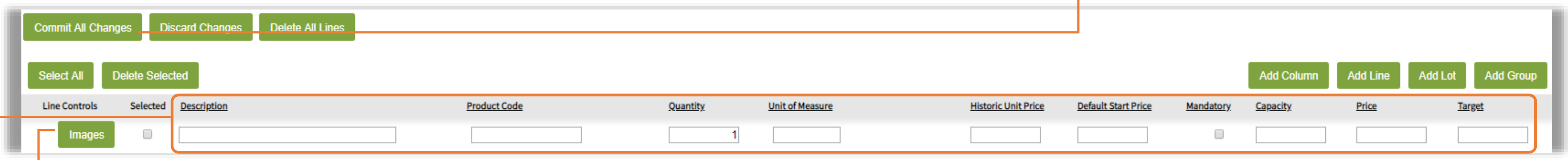
2 Click the **Add Line** button.



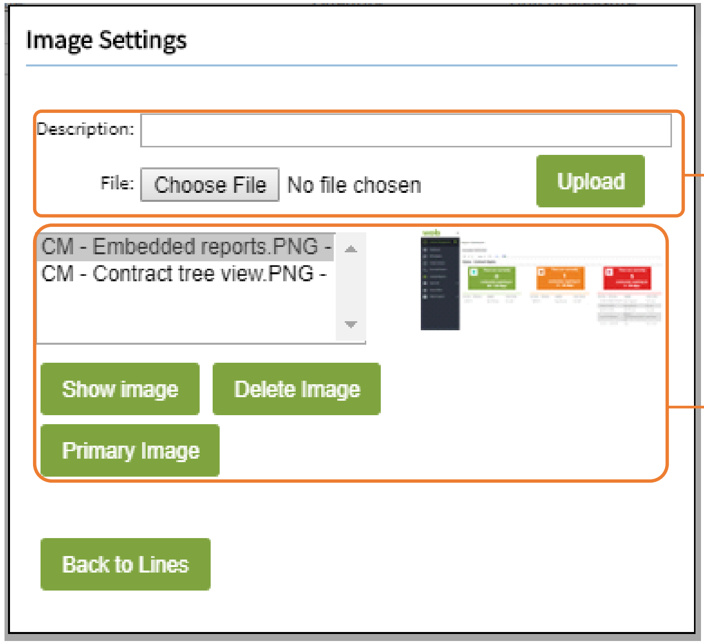
Note: This tab contains all of the information relating to the items you are going to tender for and can include information you don't wish a supplier to see. In the questionnaire section of the tender, you can bring the information from this tab through, excluding any information the suppliers shouldn't see.

3 Enter the **Description, Product Code, Quantity, Unit of Measure, Historic Unit Price, Default Start Price** and tick whether the line is **Mandatory** or not.

6 Once you have added all of the lines you wish to, click the **Commit All Changes** button. The line(s) will now appear in the Lines tab.



4 If you wish to add an image to the line, click the **Images** button on that line. This will open up the **Image Settings** pop up.



5 Enter a clear image **Description**, select the **File** for upload and click **Upload**.

6 Having uploaded some images, you can select them in the available box and do the following:

Show Image: Display the full image for yourself to see.

Delete Image: Remove the uploaded imaged.

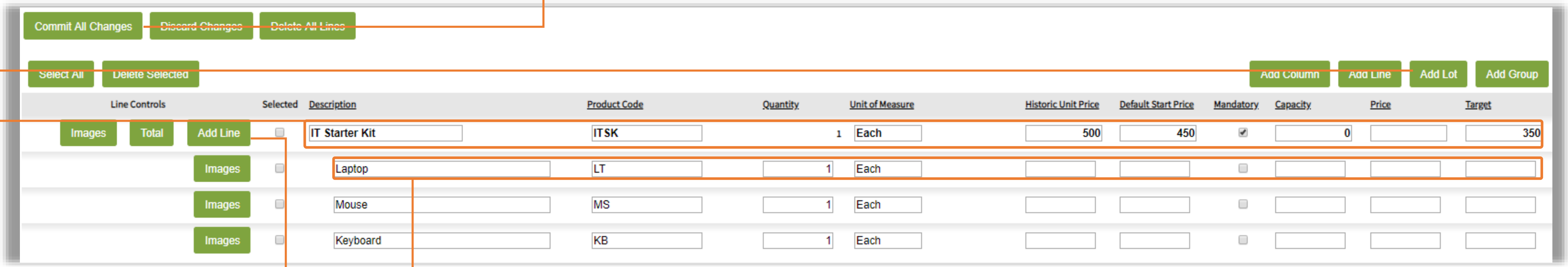
Primary Image: Make the select image the first image that suppliers see for the line.

How to Add a Lot to a Tender

Lots allow for lines to be put together and allow for the suppliers to put a price for the whole lot, as opposed to the individual lines. To **create a lot**, follow the instructions below:

1 Click the **Add Lot** button to create a lot line.

6 Click the **Commit All Changes** button to save the lot.



2 Enter the information as required for the lot, including **Description**, **Product Code**, **Unit of Measure** etc. To add to the columns to specify extra data, select the **Add Column** button.

4 Enter the line information and repeat until you have all of the lines you wish for the lot. This information defines the different items you want the supplier to provide price for but does not require them to provide a price for each of these lines.

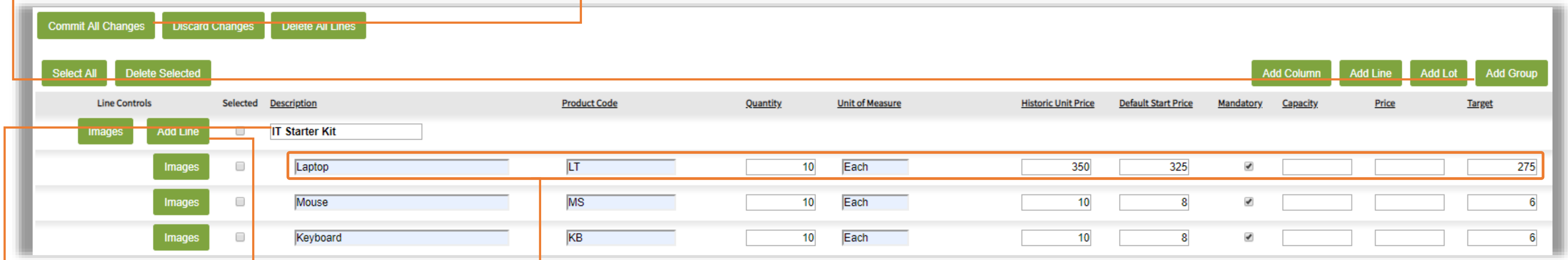
3 Click the **Add Line** button to create a line as part of the lot.

How to Add a Group to a Tender

Where lots allow for suppliers to submit pricing on a collection of lines by inputting one price, a group is a collection of lines where the supplier submits pricing on the individual lines and the price of these lines, which then makes up the total group value. To **add a group** to your tender, follow the instructions below:

1 Click the **Add Group** button to create a group line.

5 Click the **Commit All Changes** button to save the group.



2 Enter a clear **Description** that makes it obvious to the supplier what the group is for.

4 Enter the line information and repeat until you have all of the lines you wish for the group.

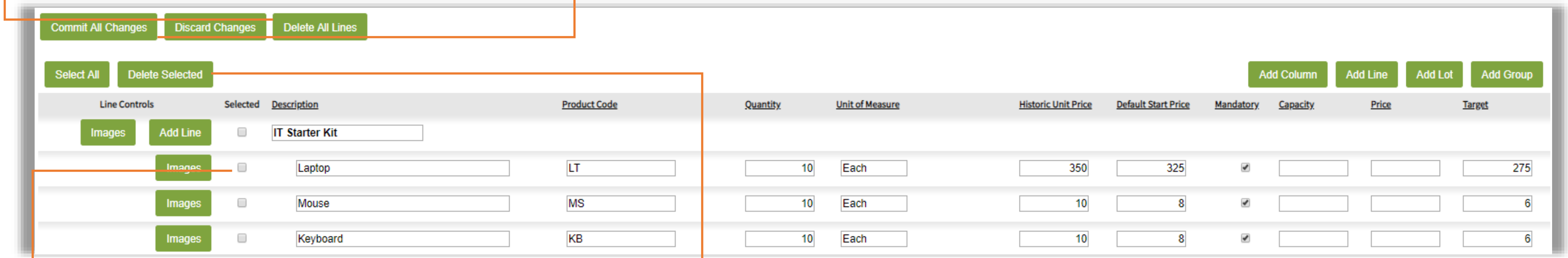
3 Select the **Add Line** button on the group line to add a line under the group.

How to Delete Lines, Lots and Groups

When building your tender lines, you may make a mistake or change your mind about what you are going to tender for. To **delete a line, lot or group**, after clicking the Edit button, follow the instructions below:

1 To delete all lines and begin building the lines for the tender from scratch, select the **Delete All Lines** button.

4 Click **Commit All Changes** to finalise the deletion of the lines. This cannot be undone, so be careful to ensure you have selected the correct lines.



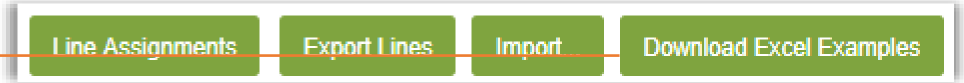
2 To delete only selected lines, select the **Lines, Lots** or **Groups** you wish to delete, using the tick boxes.

3 Click the **Delete Selected** button to remove the lines you have selected.

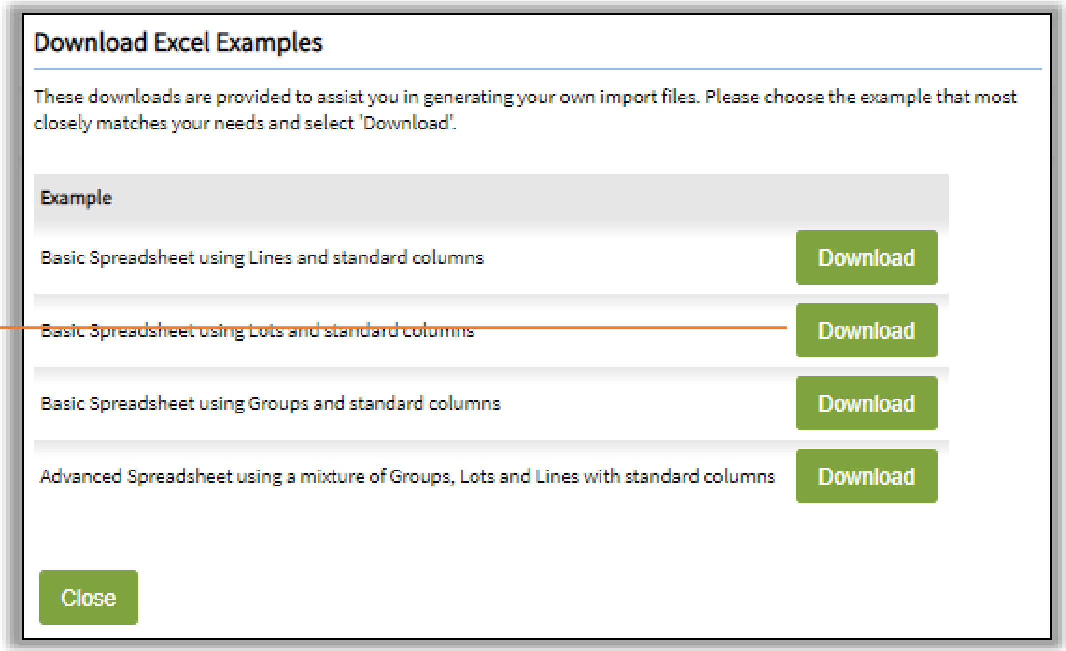
How to Create Tender Lines using an Excel Template

web3 supports the use of excel template imports for the creation of lines. To do so, firstly you will need to download an excel template. Follow the instructions below to do exactly that:

1 Select the **Download Excel Examples** button.



2 Choose which **Template** you want to use and click the **Download** button.



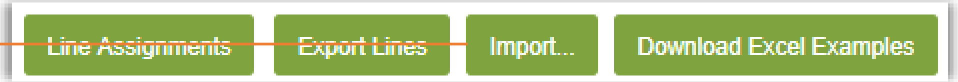
3 Select **Open** on the subsequent pop up bar.

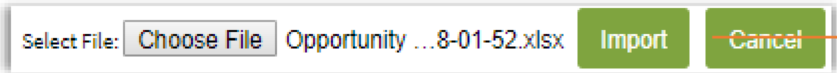
4 Complete the spreadsheet using the columns in the same way that you would from within **web3**.

	B	C	D	E	F	G	H	I	J	K	L	M
1												
2				Visibility:	Supplier Visib	Supplier Visible	Supplier Vi	Supplier Visibl	Buyer Only	Supplier Visil	Buyer Only	Supplier Editable
3				Data Type:	Free Text (400	Free Text (400)	Decimal Nu	Free Text (400)	Monetary Val	Monetary Va	Tick Box	Monetary Value
4				Options:								
5												
7	Delete (y/n)	Group/Lot Name	Parent Group/Lot Name	Group/Lot	Product Code	Description	Quantity	Quantity Per U	Historic Price	Default Start	Mandatory	Price
8	n	Pens		Group								
9	n		Pens		REDPEN	Red Pens	100	BOX OF 10	1.5	2	No	1
10	n		Pens		BLUEPEN	Blue Pens	200	BOX OF 10	1.45	2	No	2
11	n		Pens		BLACKPEN	Black Pens	150	BOX OF 10	1.45	2	No	3
12	n	Lot 1		Lot	lot	Lot 1	1		4	9	No	3
13	n		Lot 1		cod	lot	1	per 10	2	3	No	6
14	n		Lot 1		cod	lot 2	1	per 2	2	6	No	5
15	n				000123	Blue Pen	10	per 10	4.2	4.29	No	1
16												
17												

5 Save the file to your local drive and go back to the Lines tab in **web3** of the tender you are creating.

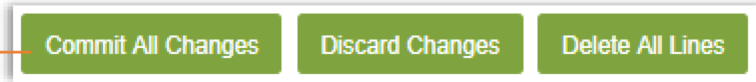
6 Select the **Import** button.





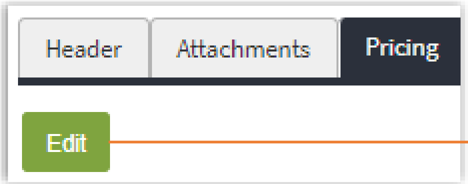
7 Select the file using the **Browse** button and locating it on your local drive. Then, click **Import** to upload the lines, lots and groups. They will now appear beneath and can be edited from here.

8 Click **Commit All Changes** to save the lines.

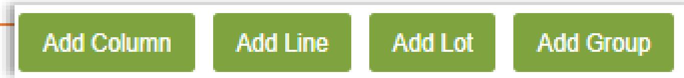


How to Add Columns to Line

When creating the lines for your tender, you may wish to add extra columns of data. To **add extra columns**, follow the instructions below:



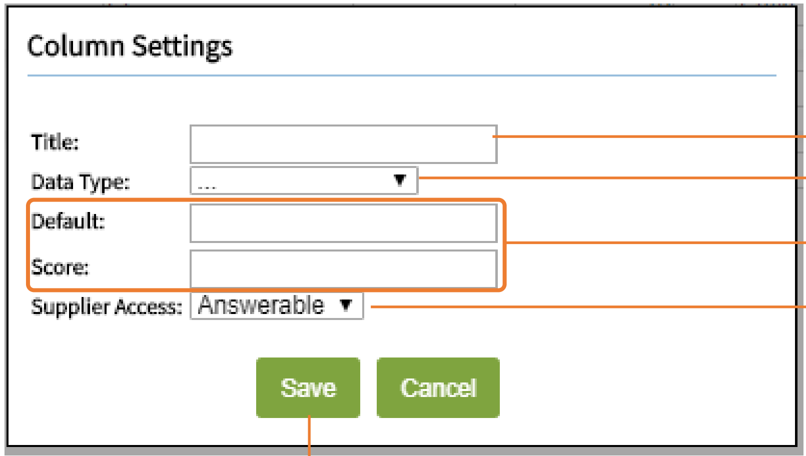
1 Click the **Edit** button on the **Lines tab**.



2 Click the **Add Column** button.

3 Enter a clear **Title** for the column.

4 Select the **Data Type** for the column from the drop-down and complete the data type-specific attributes that subsequently appear. For more information, see the data types below.



5 If required, set a **Default Value** and a **Score** for this field.

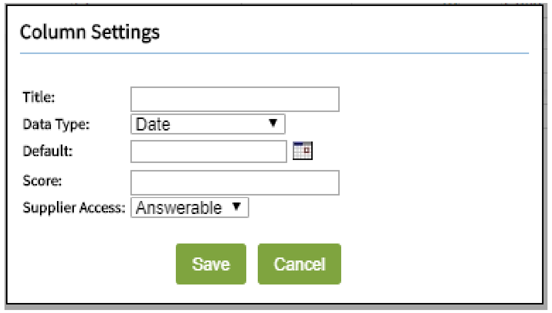
6 Select the level of access the supplier will have to this field: **Answerable, Read Only** or **None**.

7 Click **Save** to add the column to all of the lines that make up the tender.

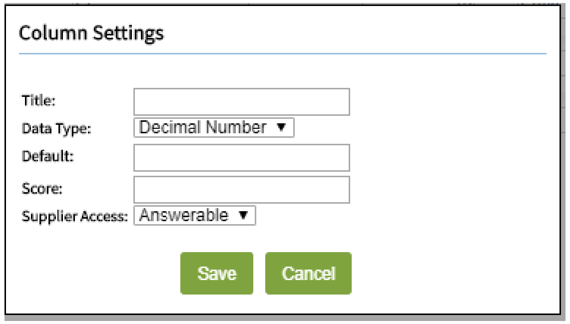
The Data Type Attributes

The following are the views you will see when selecting the different Data Types when creating a new column:

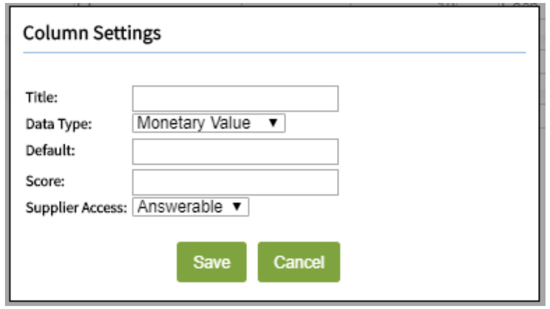
Date



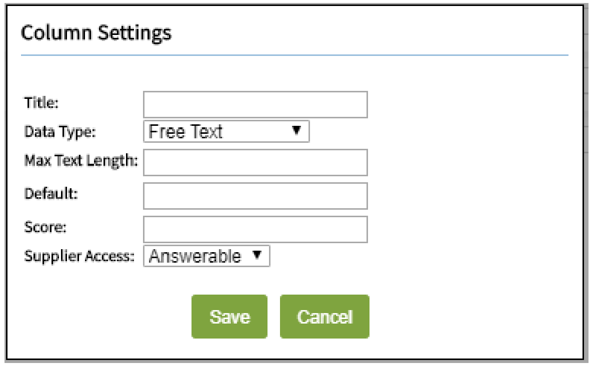
Decimal Number



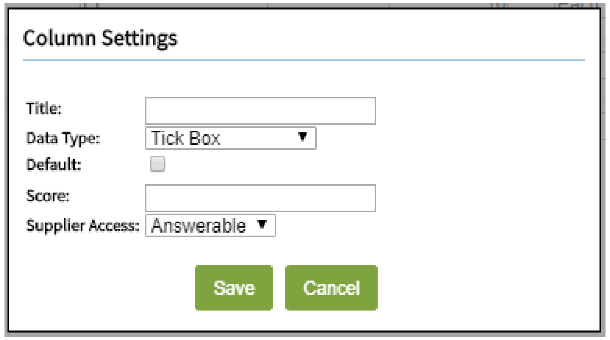
Monetary Value



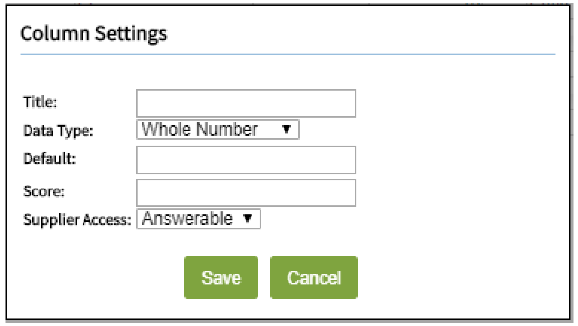
Free Text



Tick Box

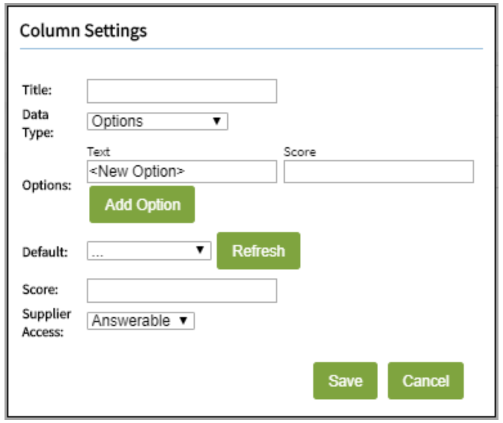


Whole Number



The Max length can be set from 40 to 4000 characters.

Options

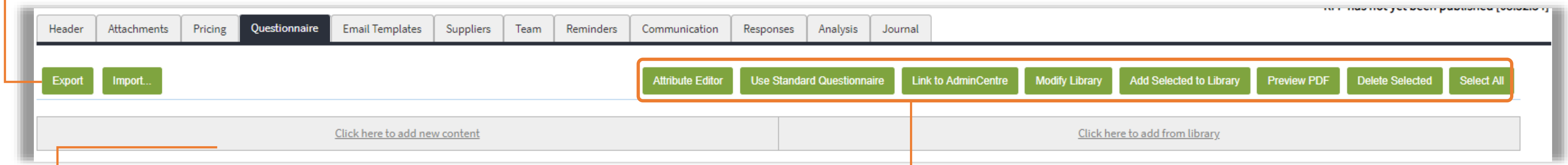


To add multiple options, use the **Add Option** button.

How to Use the Questionnaire Tab

The **Questionnaire tab** is where you build the document that you want your suppliers to respond to. It is a flexible tool that allows you to gather all of the data that you would require when tendering for varying complexities of items. Questionnaires can be built within **web3**, or offline and imported in. The initial view of the **Questionnaire tab** will be the following:

1 **Import** and **Export** buttons to either import or export with Excel.

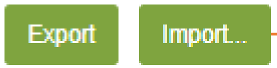


2 If you have created any content, or chose to use a standard questionnaire when initially creating the tender, the questions will appear here.

3 Any actions to manage the questions can be carried out using these buttons. All buttons are explained below in this guide.

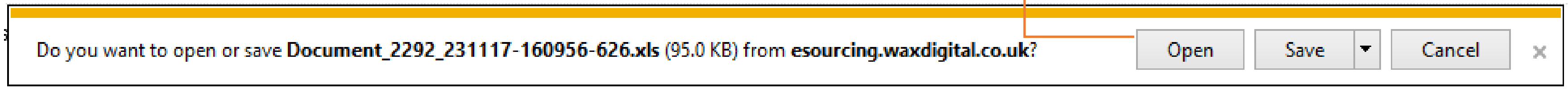
How to Export the Questionnaire

If you wish to edit or view the questionnaire offline in excel, then you will need to **export the questionnaire**. Follow the instructions below to do so:

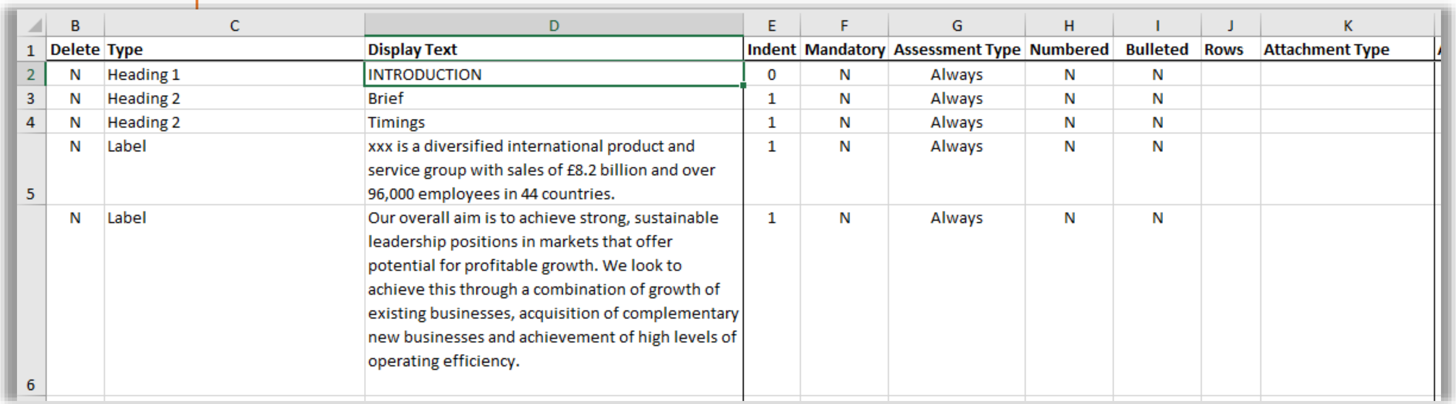


1 Click the **Export** button.

2 Click **Open** to open the excel file. Alternatively, you can click **Save** to save it to your local drive.



3 The questionnaire will now appear in an Excel spreadsheet. From here it can be edited and reimported with the edits by following the **how to import** instructions below.



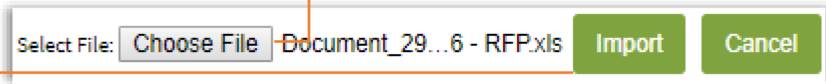
	B	C	D	E	F	G	H	I	J	K
1	Delete	Type	Display Text	Indent	Mandatory	Assessment Type	Numbered	Bulleted	Rows	Attachment Type
2	N	Heading 1	INTRODUCTION	0	N	Always	N	N		
3	N	Heading 2	Brief	1	N	Always	N	N		
4	N	Heading 2	Timings	1	N	Always	N	N		
5	N	Label	xxx is a diversified international product and service group with sales of £8.2 billion and over 96,000 employees in 44 countries.	1	N	Always	N	N		
6	N	Label	Our overall aim is to achieve strong, sustainable leadership positions in markets that offer potential for profitable growth. We look to achieve this through a combination of growth of existing businesses, acquisition of complementary new businesses and achievement of high levels of operating efficiency.	1	N	Always	N	N		

How to Import a Questionnaire

Having either built or edited your questionnaire in excel, you will then need to import it. To do so, follow the steps below:

1 Click the **Import** button.

2 Locate the **saved file** on your local drive.

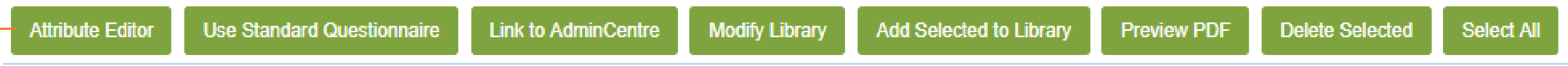


3 Click **Import** once the correct document has been chosen. The system will show a confirmation if the import has been successful, or highlight any errors that need correcting.

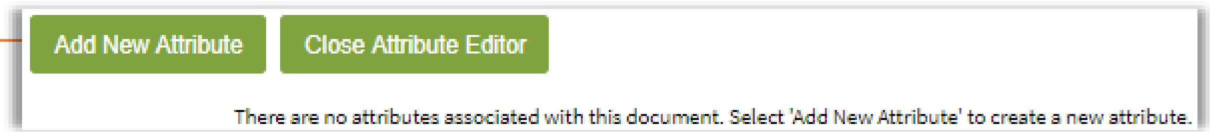
How to Use the Attribute Editor

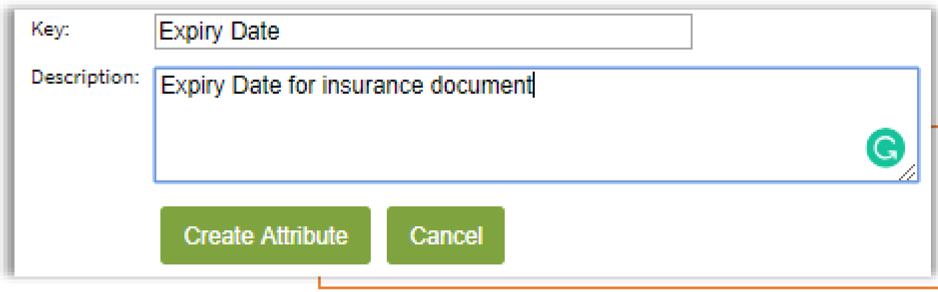
The **Attribute Editor** allows you to create and assign attribute data fields for alerts. It allows you to set up specific alerts based on the responses that your suppliers give to a specific question. For example, if you ask a supplier to provide a date as a response to a question, you can set up a reminder to go out on or around that date. To add an attribute, follow the instructions below:

1 Click the **Attribute Editor** button to navigate to the **Attribute Editor** page.



2 Click the **Add New Attribute** button.





3 Enter a clear name for the attribute in the **Key** field and a description in the **Description** box.

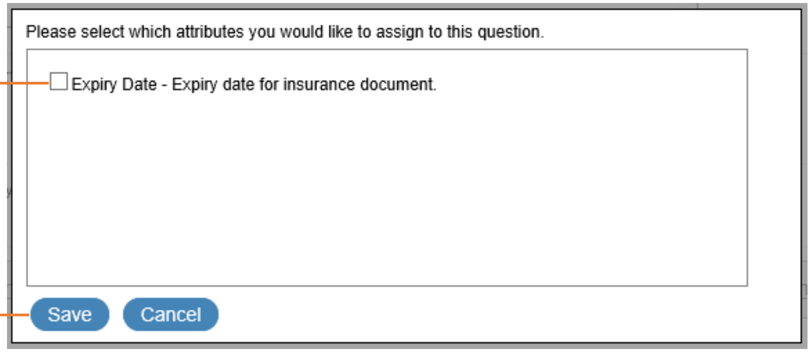
4 Click the **Create Attribute** button. The attribute will now be displayed on the Attribute Editor.

How to Link an Attribute to a Question

Once you have created an attribute, the next step is to **link it to a question**:

1 Click the icon on the question you wish to link.

2 Select the **Attribute** you wish to link by clicking the tick box.

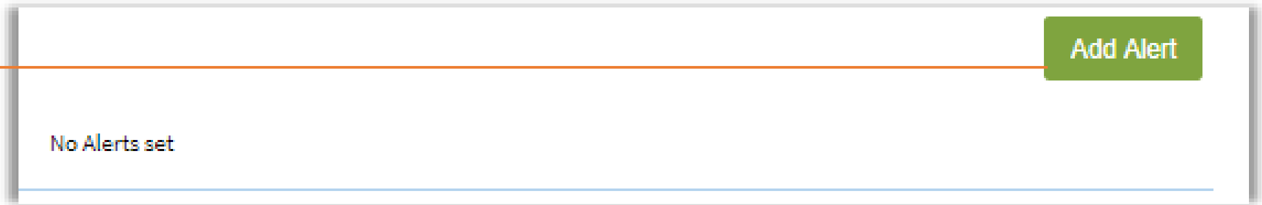


3 Click the **Save** button to finalise the link between the question and the attribute.

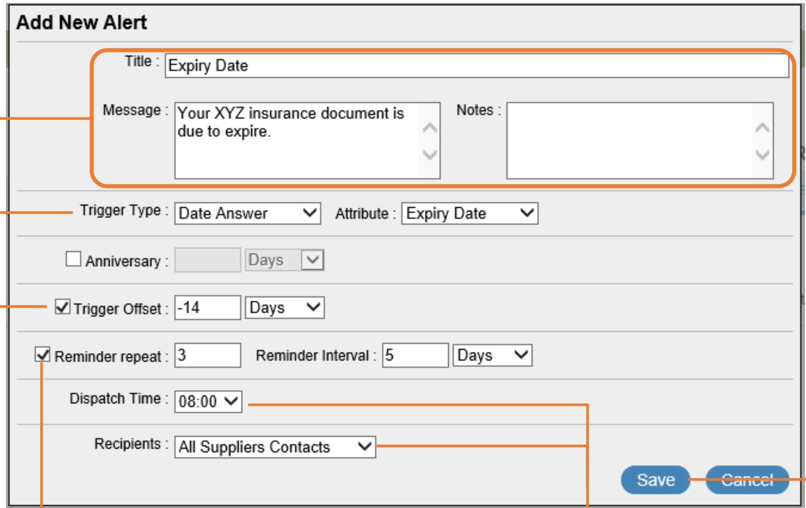
How to Create an Alert from an Attribute

Now that you have created the attribute and linked it to the question, you can create an alert that sends based on what the supplier responds. Follow the instructions below to do this:

1 Click the **Add Alert** button.



3 Enter a clear **Title** for the alert and the **Message** you wish to send with the alert.



8 Click **Save** to create the alert. It will now appear in the Reminders tab and can be edited from here.

4 Select the **Trigger Type** as **Date Answer** and then select your **Attribute** from the drop-down.

5 Choose when the alert will fire in relation to the date. Use the minus symbol to set the trigger for before the date.

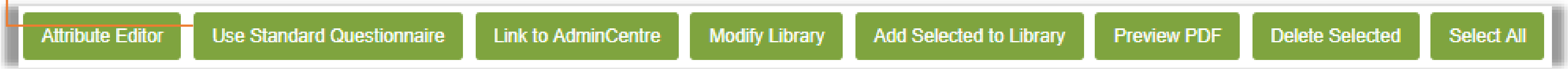
6 Select if you want a reminder, how many you want and how often the reminders should fire.

7 Choose the time of day you want the alert to be sent and who the recipients should be.

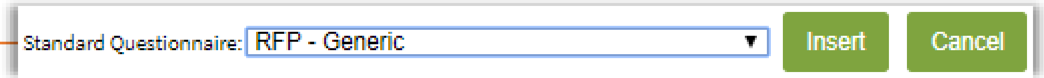
How to Select a Standard Questionnaire

Standard Questionnaires help to drive efficiency in the creation of tenders, with templates providing a quick and simple way to create a questionnaire. Templates can be selected and then edited from within the Questionnaire tab, meaning you do not have to create the questionnaire from scratch for every single tender. To **select a standard questionnaire**, follow the steps below:

1 Click the **Use Standard Questionnaire** button.



2 Choose a **Standard Questionnaire** from your library using the drop-down list.

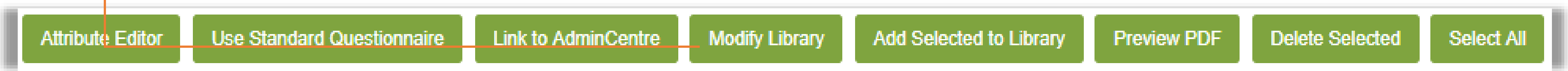


3 Click **Insert**. The questionnaire will now appear beneath in the Questionnaire tab. You can edit the questionnaire to make it specific to the tender you are creating by following the instructions regarding question creation below, without overwriting the template.

How to Modify the Question Library

The Question Library is a store of pre-built questionnaires and content that can be used and/or built into your questionnaire. It is split into two areas, the Global Library which is available to all users of your system and the My Library which is full of your own content. To **modify the library**, follow the steps below:

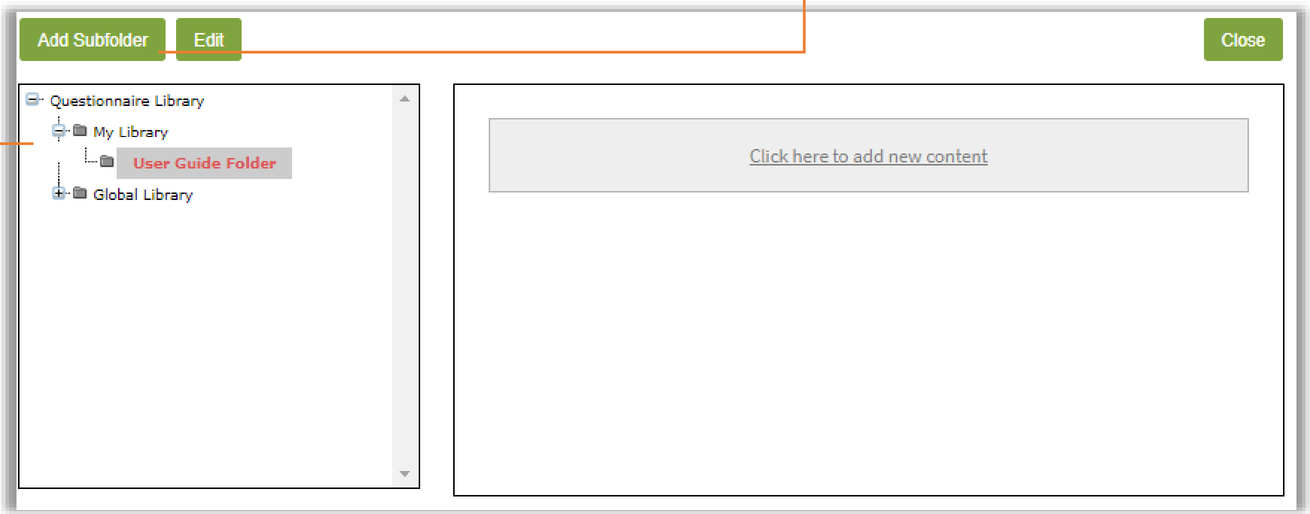
1 Select the **Modify Library** button.



To create a subfolder in the library:

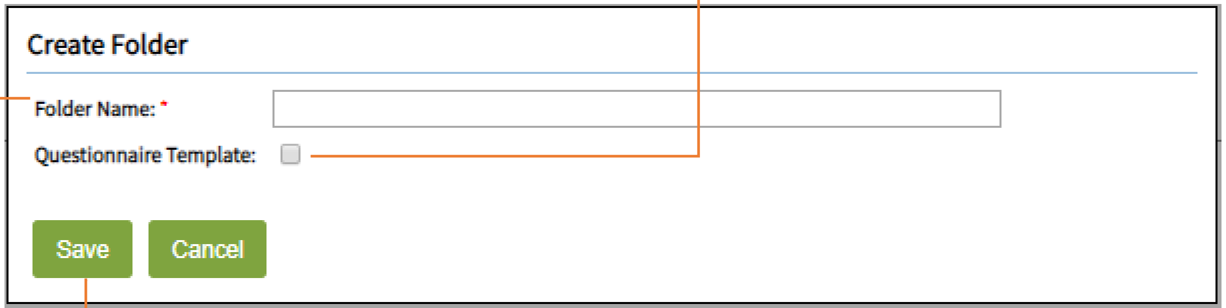
1 Select the top-level folder you wish to create a subfolder under.

2 Click the **Add Subfolder** button.



3 Enter a clear **Folder Name**.

4 Select whether this folder is to be a questionnaire template or not.



5 Click **Save** to create the folder.

How to Modify Content in the Library

1 Select the folder you wish to modify.

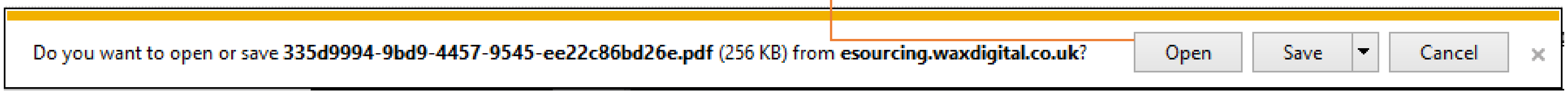
2 Click **Edit** on the content you wish to change. Then to edit the content, follow the instructions for creating and editing the content type in this document.

How to Preview a PDF Version of your Questionnaire

At times, you may wish to download a PDF version of your questionnaire. To do so, follow the stops below:

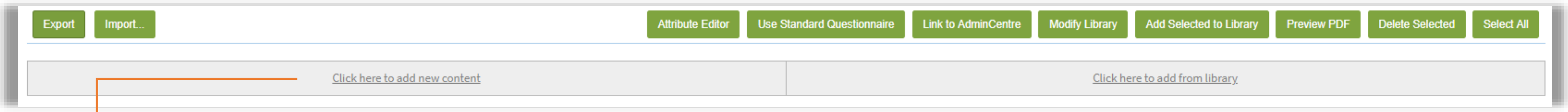
1 Click the **Preview PDF** button.

2 Select **Open** to view the PDF.



How to Create a Questionnaire

If you decide to create your questionnaire from scratch, then you can build the headers, paragraphs, labels, product lists and questions (amongst other questionnaire features) from within **web3**. Alternatively, you can use the instructions below to edit a standard questionnaire to help it better fit your tender. All features within the questionnaire are referred to as content. To **add new content**, follow the instructions below:

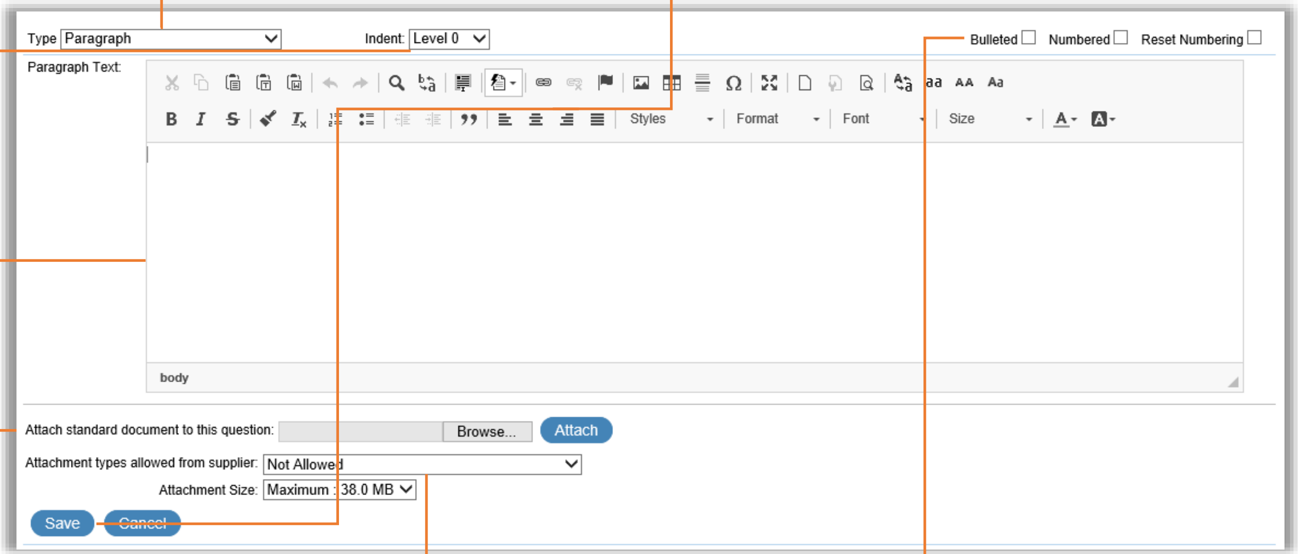


1 Click the **Click Here To Add New Content** button.

2 Select the question **Type** from the drop-down list. Each question type is explained in the pages below.

3 Choose the **Indent level**.

4 Enter the text you wish to use for the question, using the HTML editor to edit the format.



5 Add any **Attachments** you want suppliers to see alongside this question.

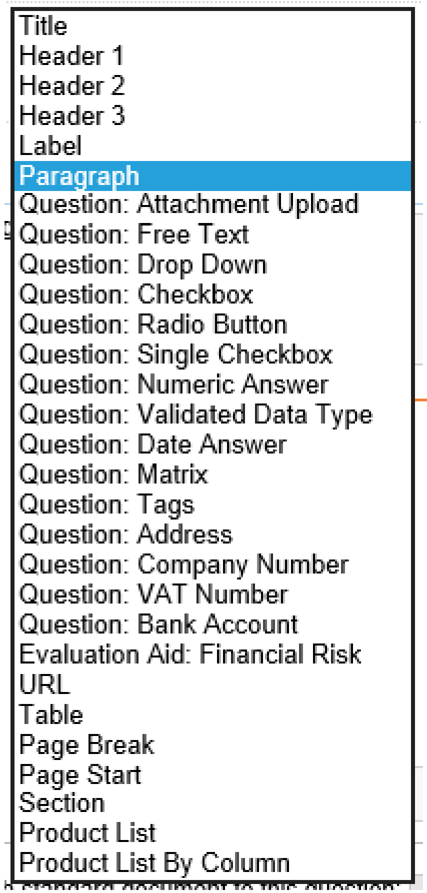
6 Choose whether you wish suppliers to be able to add attachments by selecting the type of attachment they can add and the maximum size of the attachment.

7 Select whether you wish the content to **Numbered** or **Bulleted**, and whether you wish to reset the numbering.

8 Click **Save** to create the content. It will now appear in the content of the questionnaire tab.

How to Use the Different Types of Questions

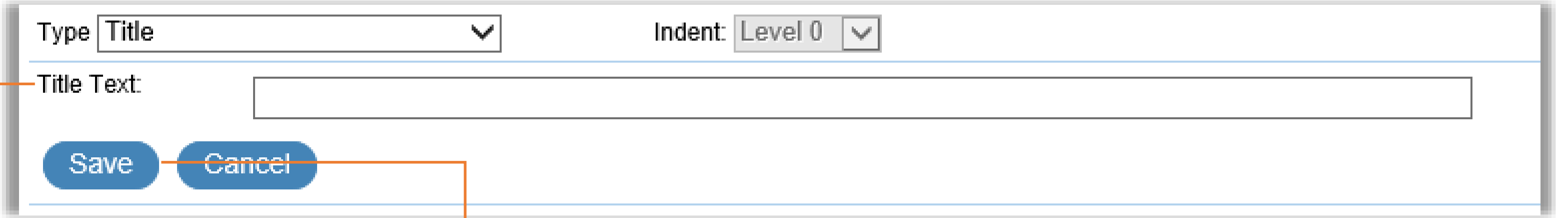
When creating your questionnaire, you will have the option of creating many different types of content. When you select your questions type, the options necessary for any given type will appear, be it additional space for multiple choice questions or just a text box for a title. The following instructions will show you the extra options you have to select on top of the generic new content instructions above:



1 Select the **question type** from the drop-down list.

How to Add a Title

The title is displayed across the whole page and can be used to make it clear what the questionnaire is for. To **create a title**, firstly follow the instructions of how to add new content and select **Title** from the **Type** drop-down. Then, follow the steps below:

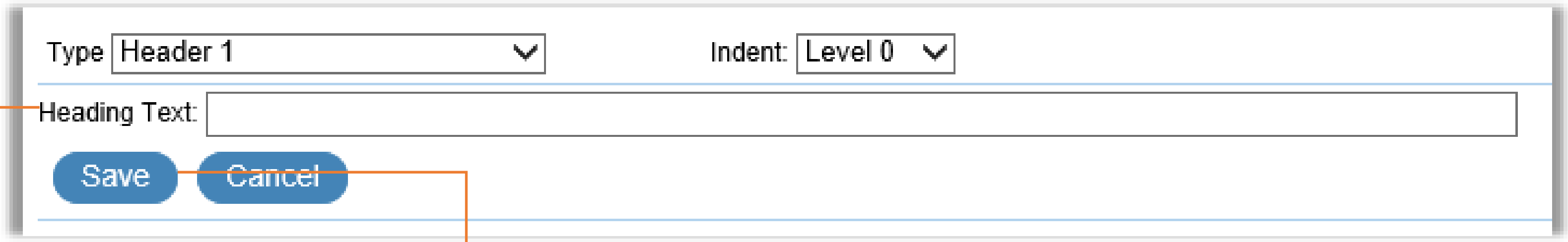


1 Enter a clear **Title** in the free text box.

2 Click **Save**. The title will now appear across the questionnaire.

How to Add a Header

web3 allows for up to 3 levels of headers to be created to provide clear structure to the questionnaire. To **add a header**, follow the instructions below after choosing **Header** from the **Type** drop-down:



1. Enter a clear **Header** in the free text box that clearly described the section.

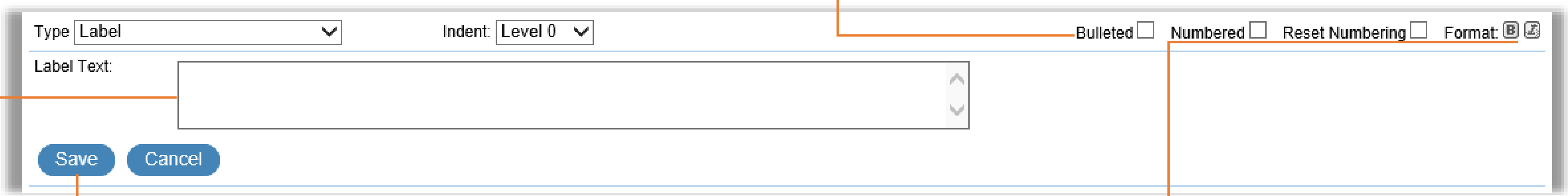
2. Click **Save**. The header will now appear across the questionnaire.

How to Add a Label

Labels allow for additional text to be added to the questionnaire to help provide extra information or clarity on any sections within the questionnaire. When **adding a label**, follow the instructions below:

1 Enter your **label** into the free text

2 Select whether you wish the content to **Numbered** or **Bulleted**, and whether you wish to reset the numbering.



3 Select whether you wish the label to be **Bold** or *Italic*.

4 Click **Save**. The label will now appear across the questionnaire.

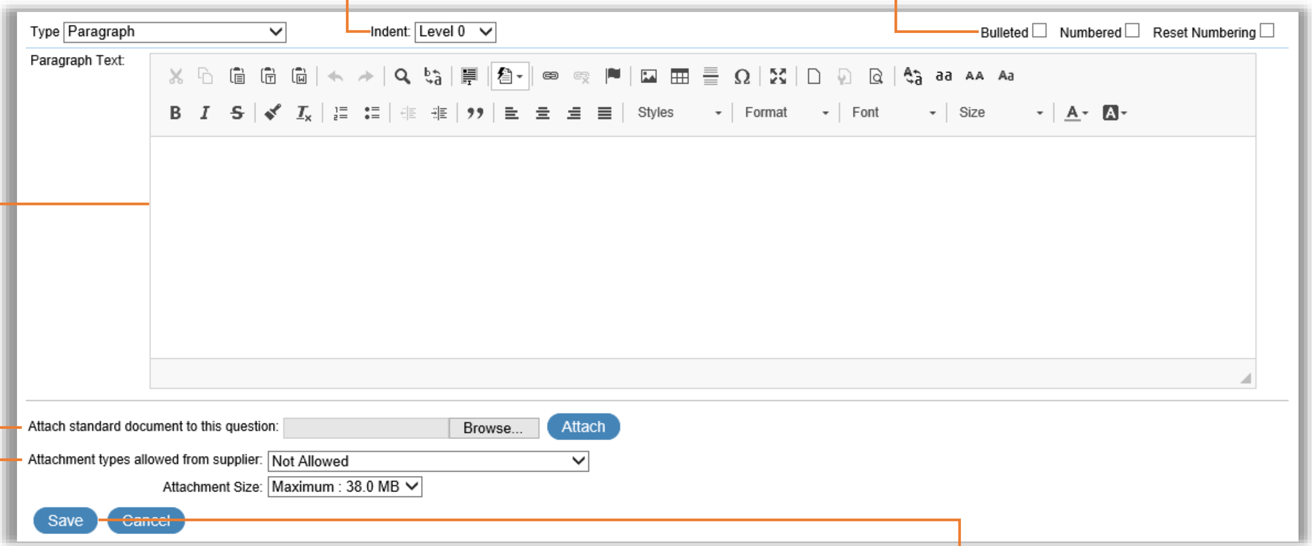
How to Add a Paragraph

Paragraphs, like labels, allow for text to be added to the questionnaire to help provide explanations and clarity. The main difference between paragraphs and labels is that the attachment functionality is available here. When **adding a paragraph**, use the following instructions:

1. Enter your **Text** into the available box and use the HTML editing tools to format the text.

2. Choose the **level of indent** for the paragraph.

3. Select whether you wish the content to **Numbered** or **Bulleted**, and whether you wish to reset the numbering.



4. Add any **Attachments** you want suppliers to see alongside this paragraph.

5. Choose whether you wish suppliers to be able to add attachments by selecting the type of attachment they can add and the maximum size of the attachment.

6. Click **Save** to add the paragraph to the questionnaire.

To Add an Attachment Upload Question

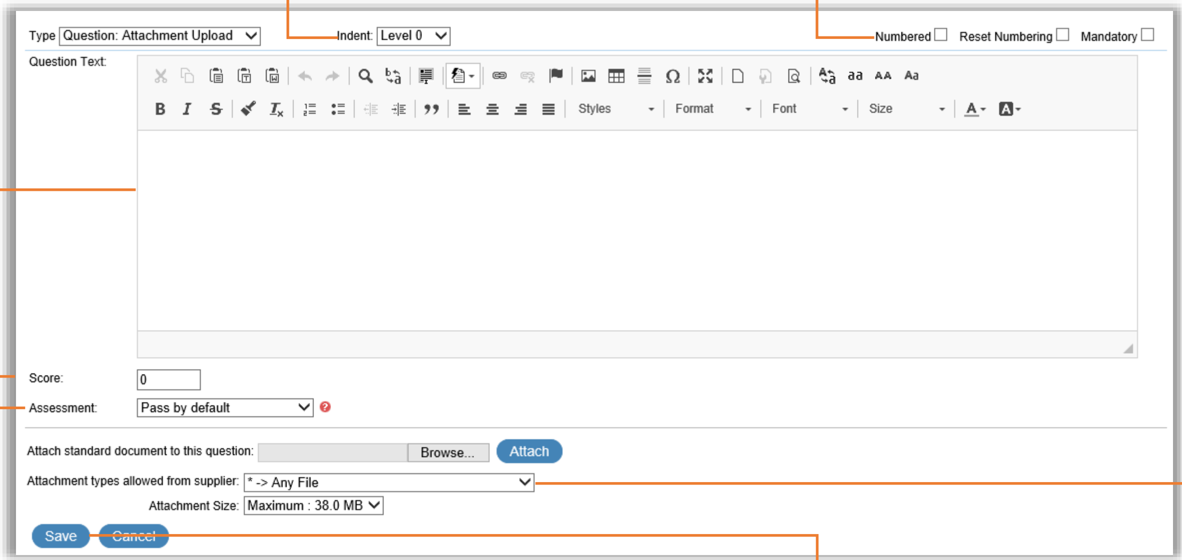
In some questionnaires, you may wish suppliers to upload an attachment. This could be an insurance document, or any other separate document that you require as part of the questionnaire response. When **adding an attachment upload question**, follow the steps below:

1 Enter your **Question** into the available box and use the HTML editing tools to format the text.

2 Choose the **level of indent** for the question.

3 Choose if you wish this question to be **Numbered** and/or **Mandatory**, or if you wish to **Reset Numbering** from this question.

4 Choose the **Attachment Type** and **Maximum File Size** you wish the suppliers to upload.



5 Choose if you wish to allocate this question a **Score**.

6 Select the method of **Assessment** for this question. Use the ❓ icon to find explanation regarding each assessment method.

7 Click **Save**. The question will now appear in the Questionnaire tab.

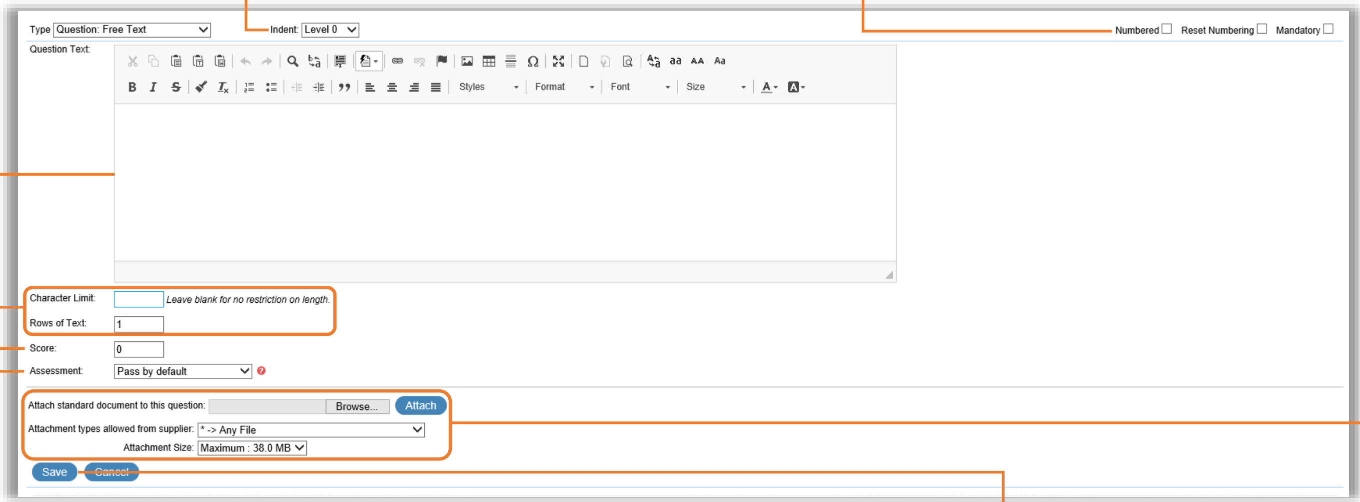
How to Add a Free Text Question

Free Text Questions allow the suppliers to respond with any text they wish to input. When **adding a free text question**, follow the instructions below:

1. Enter your **Question** into the available box and use the HTML editing tools to format the text.

2. Choose the **level of indent** for the question.

3. Choose if you wish this question to be **Numbered** and/or **Mandatory**, or if you wish to **Reset Numbering** from this question.



4. Select whether to upload any **Attachments** or whether the suppliers will be able to upload attachments when answering the question.

5. Enter the **Character Limit** and number of **Rows of Text** you wish to have as the limit.

6. Choose if you wish to allocate this question a **Score**.

7. Select the method of **Assessment** for this question. Use the ❓ icon to find explanation regarding each assessment method.

8. Click **Save**. The question will now appear in the Questionnaire tab.

How to Add a Drop-Down List Question

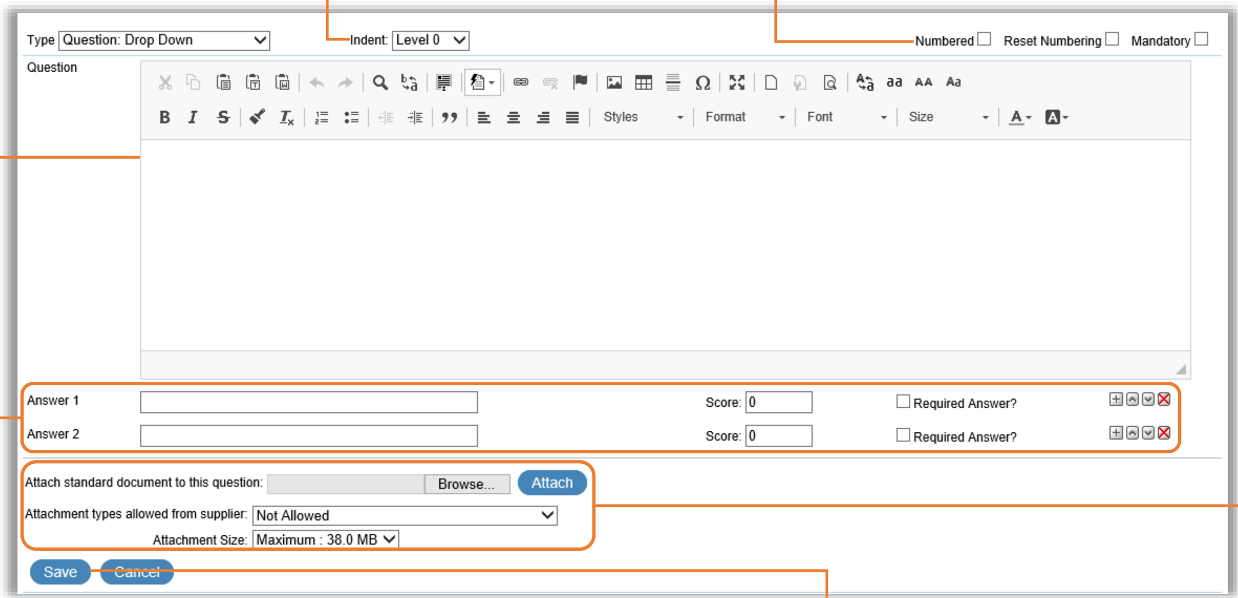
A Drop-Down List Question allows for multiple answers to be viewed in a list by selecting an answer box, before selecting just one answer. Follow the instructions below when **creating a drop-down list question**:

1 Enter your **Question** into the available box and use the HTML editing tools to format the text.

2 Choose the **level of indent** for the question.

3 Choose if you wish this question to be **Numbered** and/or **Mandatory**, or if you wish to **Reset Numbering** from this question.

4 Select whether to upload any **Attachments** or whether the suppliers will be able to upload attachments when answering the question.



5 Enter your **Answers** into the text boxes and choose whether you wish to allocate a **Score** to the answer. Then, select if it is a **Required Answer**, meaning the supplier must choose this answer to pass. Finally, use the icons to add a new answer, move the answer up and down in the list and delete an answer.

6 Click **Save**. The question will now appear in the Questionnaire tab.

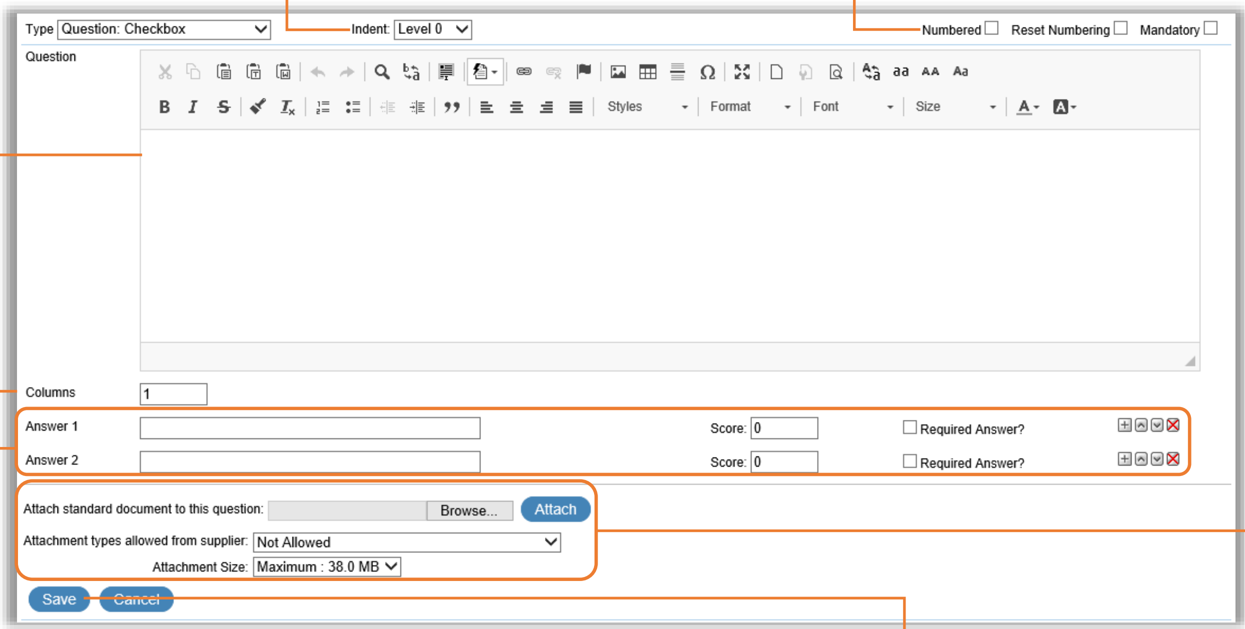
How to Add a Checkbox Question

A Checkbox Question allows for a multiple-choice question to be created, i.e where the answers are selected using a checkbox. The supplier can select multiple answers for the question. When **creating a checkbox question**, follow the instructions below:

1 Enter your **Question** into the available box and use the HTML editing tools to format the text.

2 Choose the **level of indent** for the question.

3 Choose if you wish this question to be **Numbered** and/or **Mandatory**, or if you wish to **Reset Numbering** from this question.



4 Select whether to upload any **Attachments** or whether the suppliers will be able to upload attachments when answering the question.

5 Choose how many **Columns** you wish the answers to be displayed in.

6 Enter your **Answers** into the text boxes and choose whether you wish to allocate a **Score** to the answer. Then, select if it is a **Required Answer**, meaning the supplier must choose this answer to pass. Finally, use the icons to add a new answer, move the answer up and down in the list and delete an answer.

7 Click **Save**. The question will now appear in the Questionnaire tab.

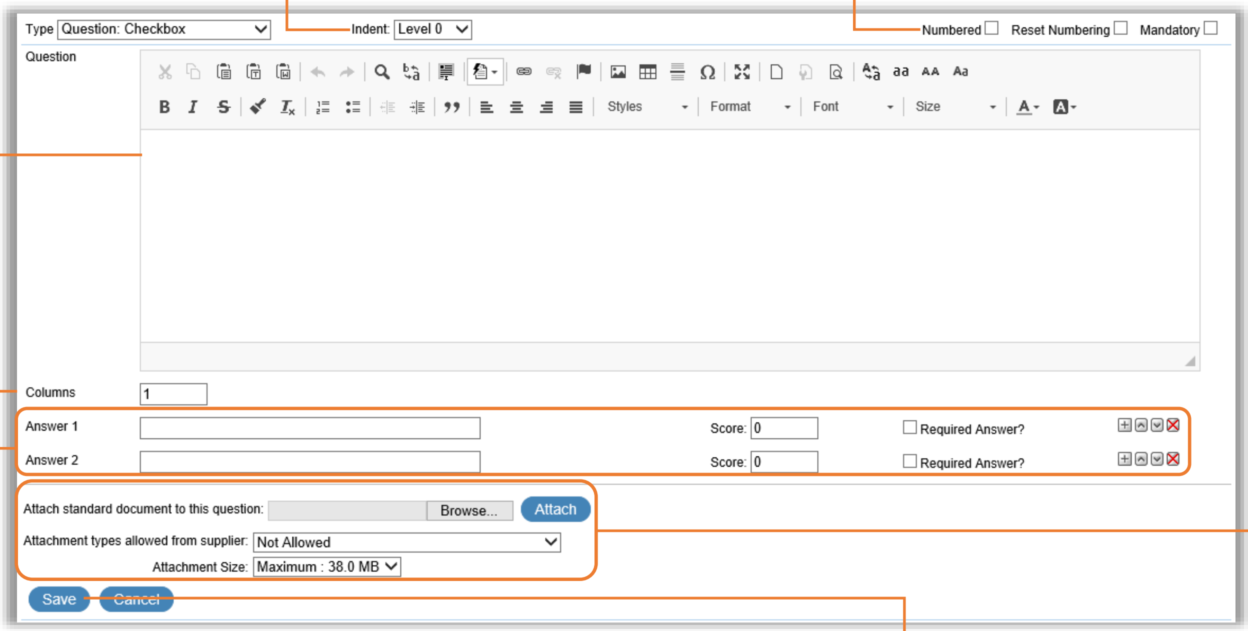
How to Add a Radio Button Question

A Radio Button Question is similar to a checkbox question in that it is multiple choice, however with a radio button question the supplier can only give one response. To **create a radio button question**, follow the instructions below:

1 Enter your **Question** into the available box and use the HTML editing tools to format the text.

2 Choose the **level of indent** for the question.

3 Choose if you wish this question to be **Numbered** and/or **Mandatory**, or if you wish to **Reset Numbering** from this question.



4 Select whether to upload any **Attachments** or whether the suppliers will be able to upload attachments when answering the question.

5 Choose how many **Columns** you wish the answers to be displayed in.

6 Enter your **Answers** into the text boxes and choose whether you wish to allocate a **Score** to the answer. Then, select if it is a **Required Answer**, meaning the supplier must choose this answer to pass. Finally, use the icons to add a new answer, move the answer up and down in the list and delete an answer.

7 Click **Save**. The question will now appear in the Questionnaire tab.

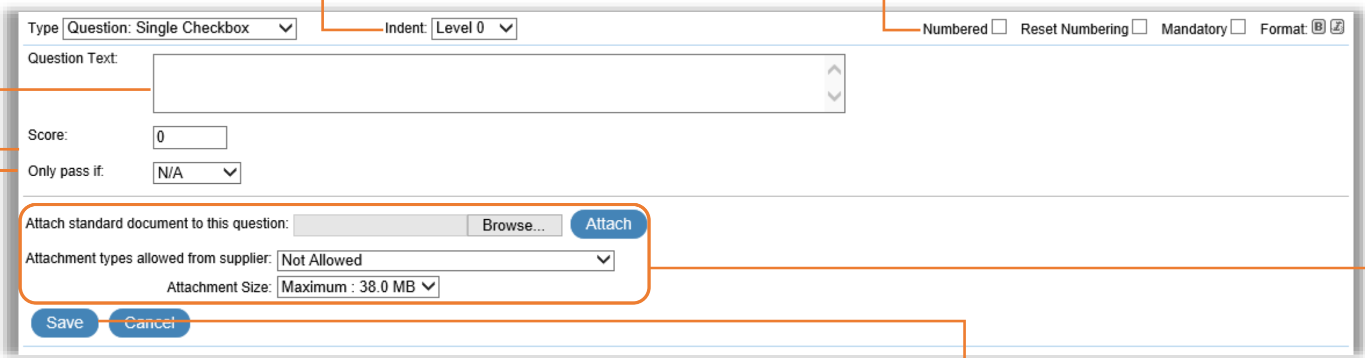
How to Add a Single Checkbox Question

A Single Checkbox Question is a pass-fail question type where the supplier is asked to tick the box of the questions to either agree or disagree with the statement or question. The answer can then determine whether the supplier passes or fails. To **create a single checkbox question**, follow the instructions below:

1 Enter your **Question** into the free text box.

2 Choose the **level of indent** for the question.

3 Choose if you wish this question to be **Numbered** and/or **Mandatory**, or if you wish to **Reset Numbering** from this question.



4 Select whether to upload any **Attachments** or whether the suppliers will be able to upload attachments when answering the question.

5 Select if you wish to enter a **Score** for the question, and the amount you wish the question to be worth.

6 Choose whether the pass for the question is from the box being ticked or not.

7 Click **Save**. The question will now appear in the Questionnaire tab.

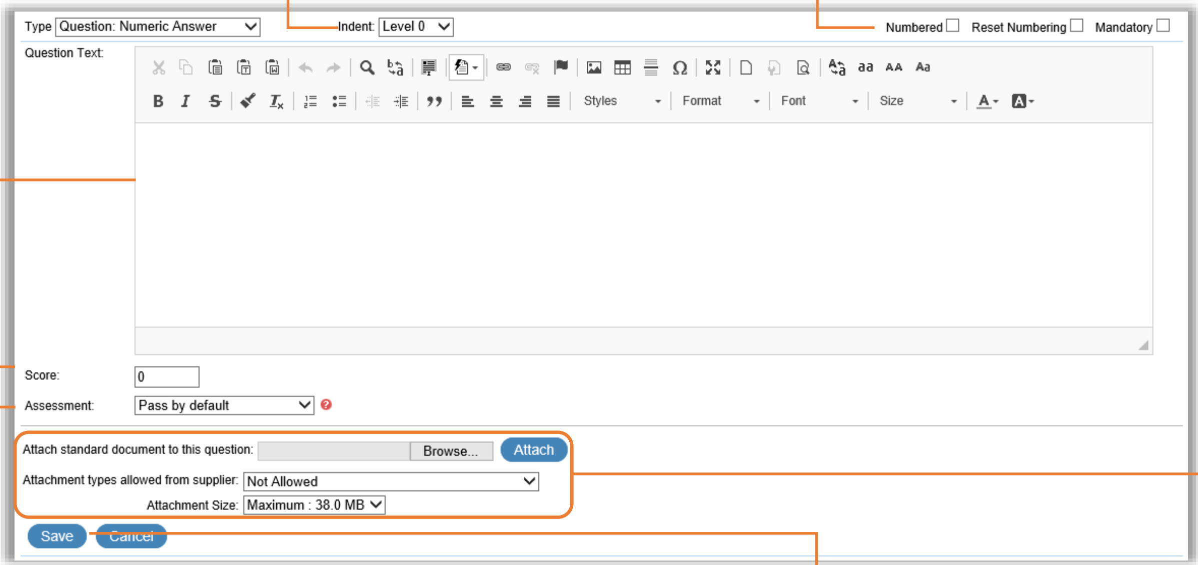
How to Add a Numeric Answer Question

A Numeric Answer Question is a straightforward question that requires the supplier to respond with a numeric value as their answer. To **create a numeric answer question**, follow the steps below:

1 Enter your **Question** into the available box and use the HTML editing tools to format the text.

2 Choose the **level of indent** for the question.

3 Choose if you wish this question to be **Numbered** and/or **Mandatory**, or if you wish to **Reset Numbering** from this question.



4 Select whether to upload any **Attachments** or whether the suppliers will be able to upload attachments when answering the question.

5 Choose if you wish to allocate this question a **Score**.

6 Select the method of **Assessment** for this question. Use the ❓ icon to find explanation regarding each assessment method.

7 Click **Save**. The question will now appear in the Questionnaire tab.

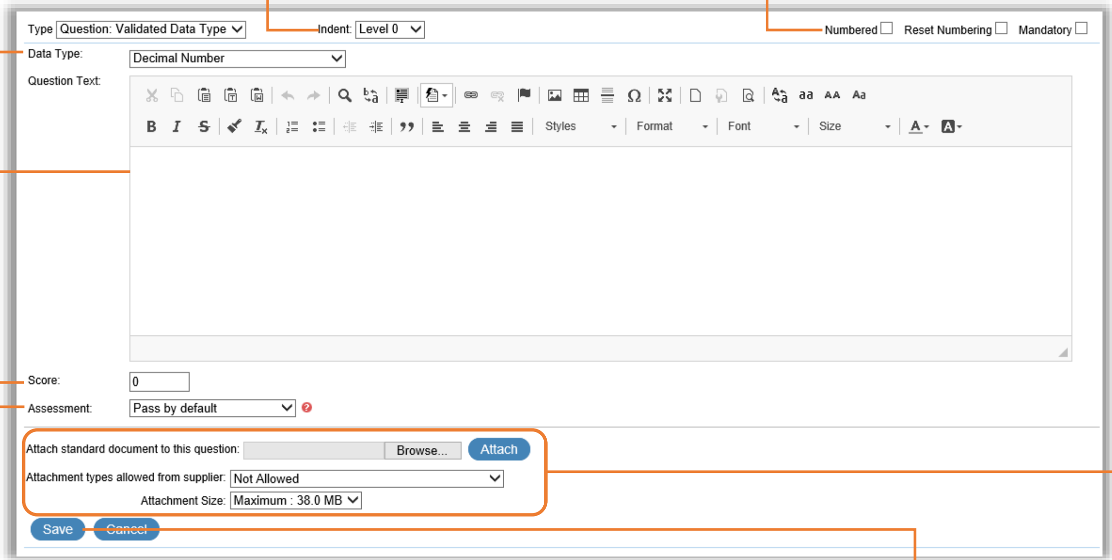
How to Add a Validated Data Question

Validated Data Type Questions allows for questions that require answers to be in specific formats, such as UK Bank Account Number, Post Code, VAT Number, Email Address etc. When **creating a validated data question**, follow the steps below:

1 Choose the **Data Type** you wish the suppliers to respond with.

2 Choose the **level of indent** for the question.

3 Choose if you wish this question to be **Numbered** and/or **Mandatory**, or if you wish to **Reset Numbering** from this question.



4 Select whether to upload any **Attachments** or whether the suppliers will be able to upload attachments when answering the question.

5 Enter your **Question** into the available box and use the HTML editing tools to format the text.

6 Choose if you wish to allocate this question a **Score**.

7 Select the method of **Assessment** for this question. Use the ❓ icon to find explanation regarding each assessment method.

8 Click **Save**. The question will now appear in the Questionnaire tab.

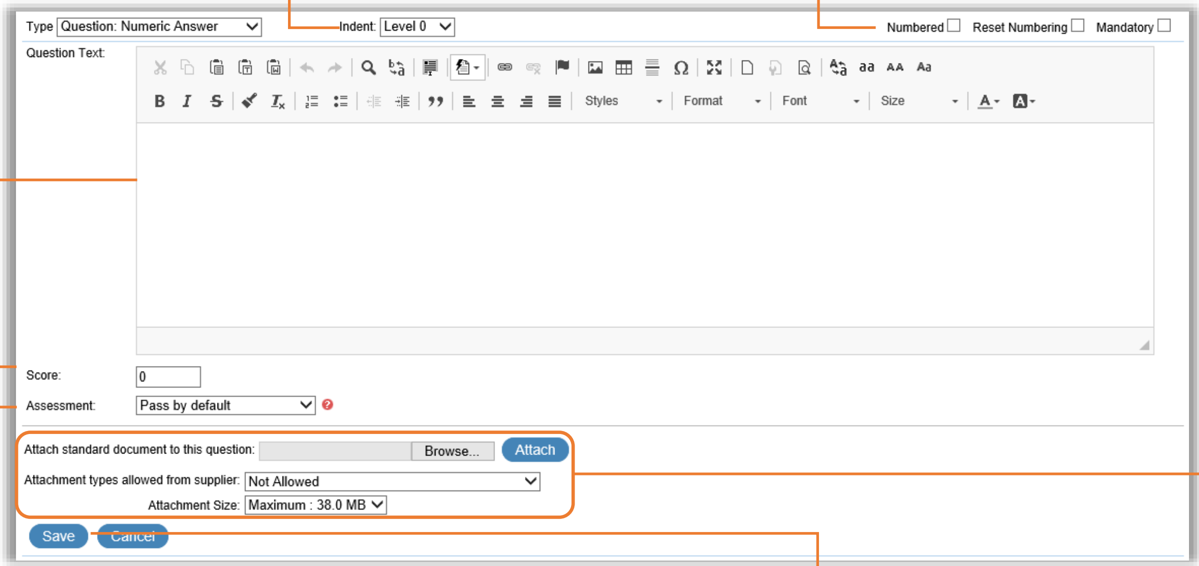
How to Add a Date Answer Question

A Date Answer Question is another straightforward question that requires the supplier to simply respond with a date as their answer. To **create a date answer question**, follow the steps below:

1 Enter your **Question** into the available box and use the HTML editing tools to format the text.

2 Choose the **level of indent** for the question.

3 Choose if you wish this question to be **Numbered** and/or **Mandatory**, or if you wish to **Reset Numbering** from this question.



4 Select whether to upload any **Attachments** or whether the suppliers will be able to upload attachments when answering the question.

5 Choose if you wish to allocate this question a **Score**.

6 Select the method of **Assessment** for this question. Use the icon to find explanation regarding each assessment method.

7 Click **Save**. The question will now appear in the Questionnaire tab.

How to Add a Question Matrix

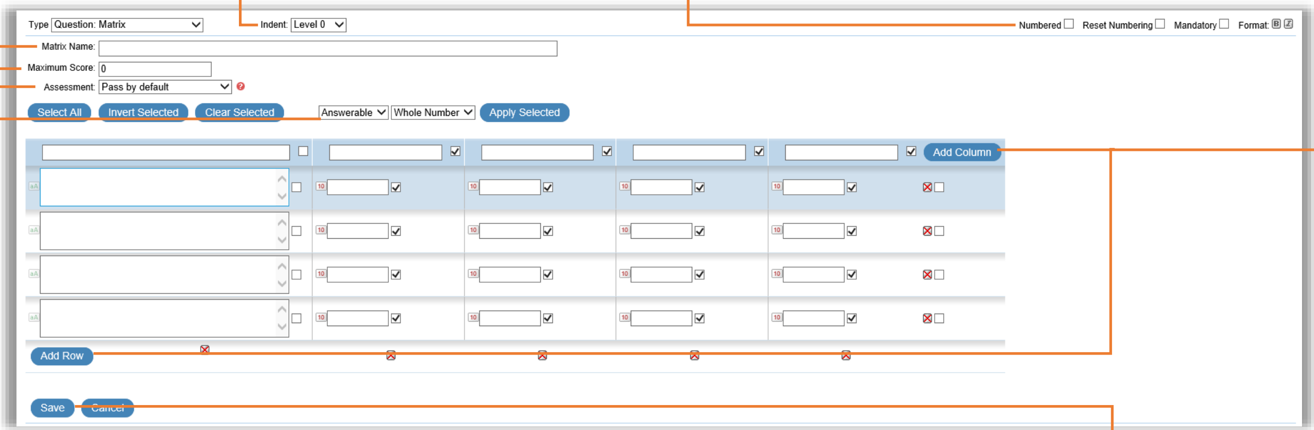
Question Matrices allow for multiple rows and columns to be added for either supplier answers or to display information in table form. To **create a matrix**, follow the steps below:

1 Enter a clear **Matrix Name**.

2 Choose the **level of indent** for the question.

3 Choose if you wish this question to be **Numbered** and/or **Mandatory**, or if you wish to **Reset Numbering** from this question.

4 Use the **Add Column** and **Add Row** buttons to build your matrix.



5 Choose if you wish to allocate a **Maximum Score** for the matrix.

6 Select the method of **Assessment** for this question. Use the ❓ icon to find explanation regarding each assessment method.

7 To format the boxes, firstly select the boxes using the tick boxes, select whether the box should be **Hidden, Answerable** or **Read Only** and then if it should be **Blank, Decimal, Text** or **Whole Number**. Then click **Apply Selected.**

8 Click **Save**. The question will now appear in the Questionnaire tab.

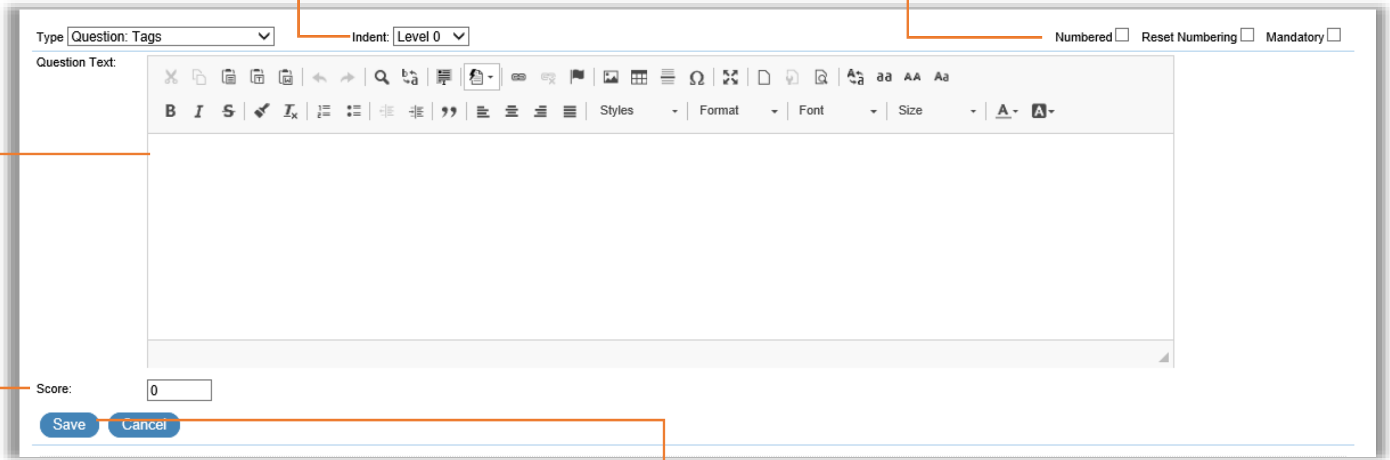
How to Add a Tag Question

A Tag Question allows for the supplier to make use of the tag taxonomy within your eSourcing system and self-select tags that apply to them. To **create a tag question**, follow the instructions below:

1 Enter your **Question** into the available box and use the HTML editing tools to format the text.

2 Choose the **level of indent** for the question.

3 Choose if you wish this question to be **Numbered** and/or **Mandatory**, or if you wish to **Reset Numbering** from this question.



4 Choose if you wish to allocate this question a **Score**.

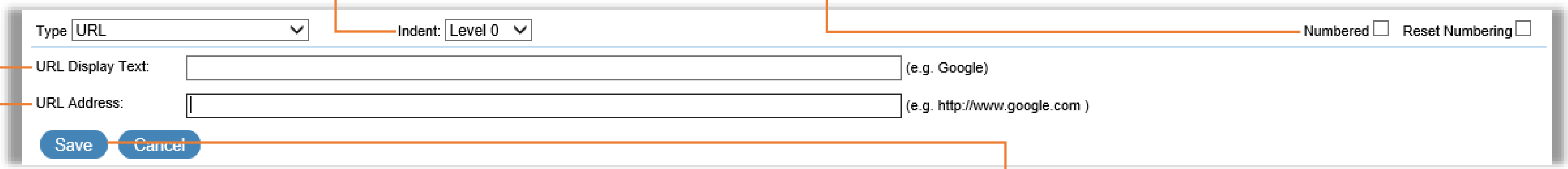
5 Click **Save**. The question will now appear in the Questionnaire tab.

How to Add a URL

In your questionnaire, you may wish to **link a URL**. Follow the steps below to do this:

1. Choose the **level of indent** for the question.

2. Choose if you wish this question to be **Numbered**, or if you wish to **Reset Numbering** from this question.



3. Enter the **Text** that should display for the URL link.

4. Enter the full **URL Address** for the link.

5. Click **Save**. The question will now appear in the Questionnaire tab.

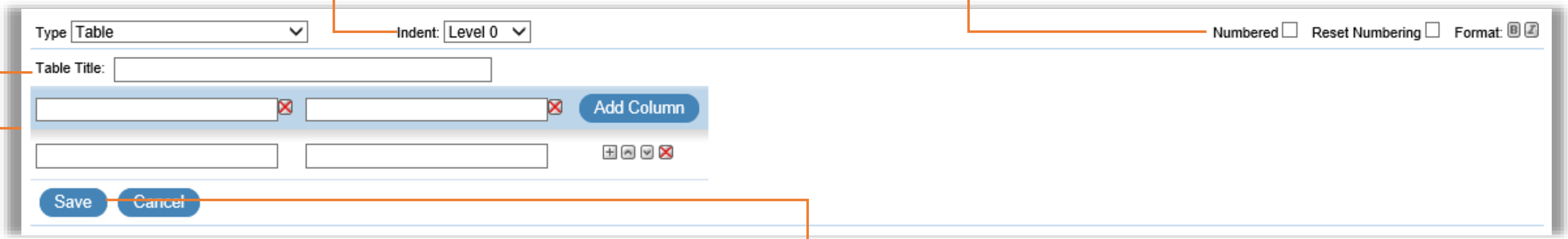
How to Insert a Table

Tables provide a great way to display information to the suppliers in the document. To **create a table** within your questionnaire, follow the instructions below:

1. Enter a clear **Title** for the table.

2. Choose the **level of indent** for the question.

3. Choose if you wish this question to be **Numbered**, or if you wish to **Reset Numbering** from this question.



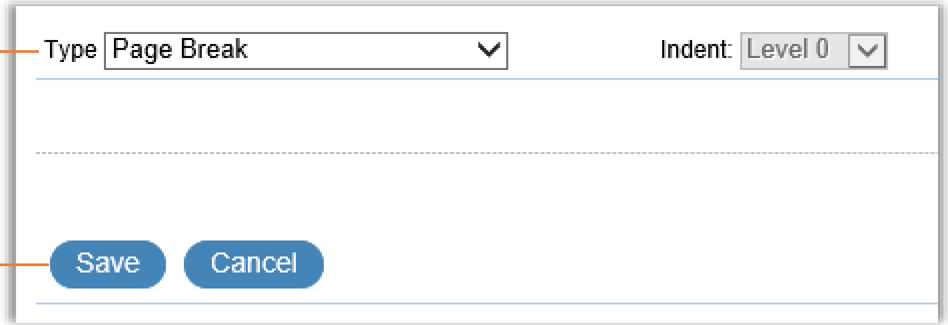
4. Click the **Add Column** button to build the table out further. Use the icons to add, move and remove any rows. Enter the text into the available boxes in the table.

5. Click **Save**. The question will now appear in the Questionnaire tab.

How to Insert a Page Break

Page Breaks can be inserted to create a new page at any point within the questionnaire. Whilst this makes no difference in the online version of your questionnaire, it does affect the PDF version, whereby each page break causes a new page to be started. This can be useful for separating your questionnaire into sections, or creating a title page by inputting a title followed by a page break. To **insert a page break**, follow the instructions below:

1 Choose **Page Break** as the content type.

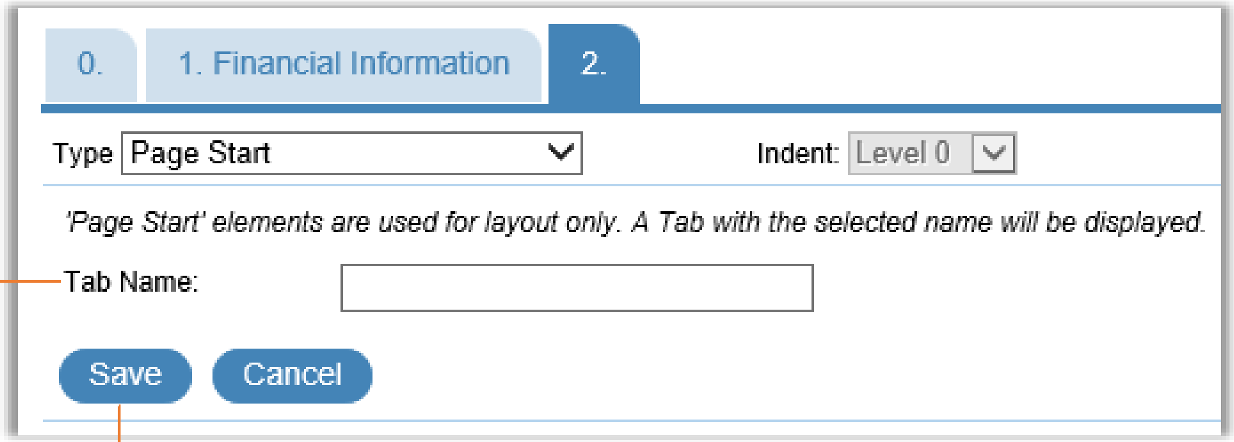


2 Click **Save**. The page break will now appear when the questionnaire is converted to a PDF.

How to Add a Page Start

Adding a Page Start in your questionnaire creates a new tab and allows the questionnaire to be divided into easy-to-navigate sections. To **add a page start**, follow the steps below:

1 Enter a clear **Tab Name** that allows the supplier to clearly see what each tab relates to.

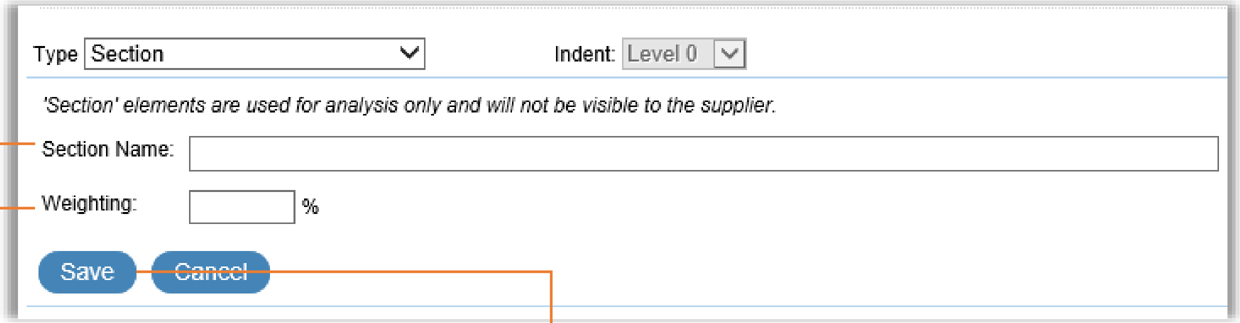


2 Click **Save**. The tab will now appear at the top of the questionnaire.

How to Create a Section

Sections provide a great way to organise groups of questions relating to the same thing. While tabs separate the questions entirely in different pages, sections break down the individual pages. Weightings can also be placed on sections and help with the evaluation of the tender responses by placing importance on the sections of questions. To **create a section**, follow the instructions below:

1 Enter a **Name** that clearly defines the sections, making it clear to suppliers what the questions in the section relate to.



2 Select, if any, the **Weighting** you wish to apply to this section. The total weighting of all sections must total 100%.

3 Click **Save**. The section will now appear in the questionnaire and questions can be created beneath it.

How to Add a Product List

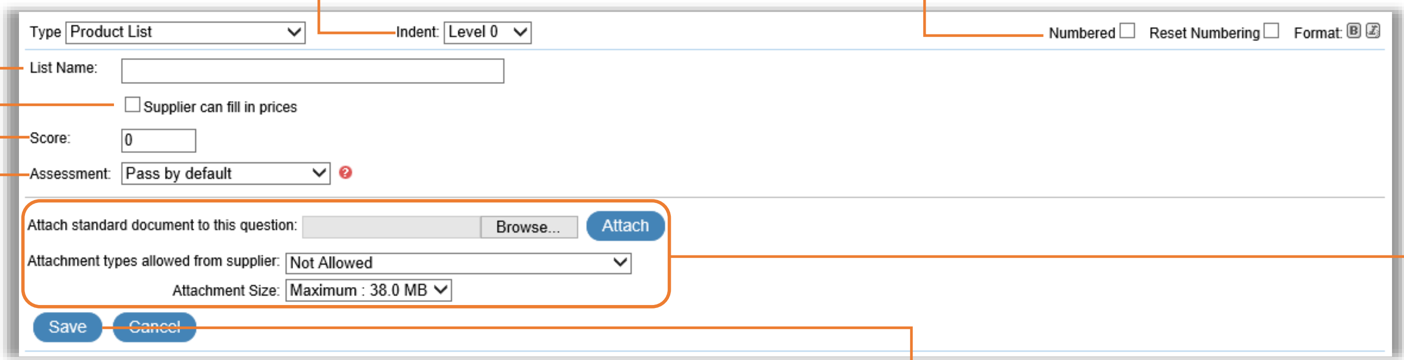
Product Lists allow for you to add the lines to your questionnaire. The option for the suppliers to submit pricing for the lines can also be added to the product list. To do so, follow the instructions below:

1 Enter a **Name** that clearly defines the list.

2 Choose the **level of indent** for the list.

3 Choose if you wish the list to be **Numbered**, or if you wish to **Reset Numbering** from this list.

4 Select whether to upload any **Attachments** or whether the suppliers will be able to upload attachments when answering the question.



5 Select whether you wish the suppliers to submit pricing for the products.

6 Choose if you wish to allocate this question a **Score**.

7 Select the method of **Assessment** for this question. Use the icon to find explanation regarding each assessment method.

8 Click **Save**. The question will now appear in the Questionnaire tab.

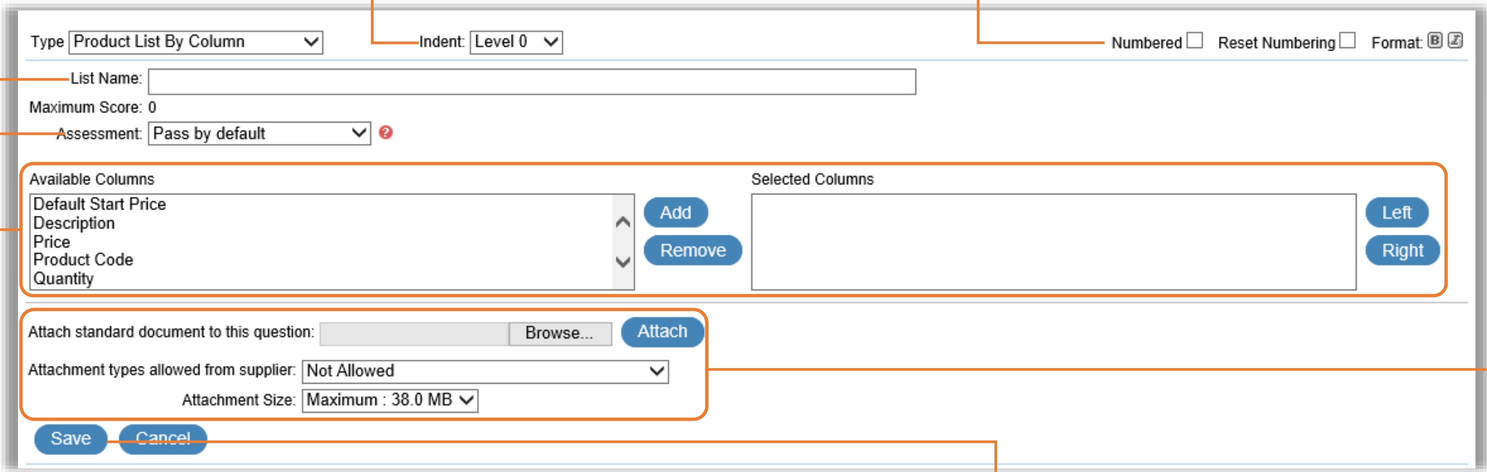
How to Add a Product List by Column

There may be information from your lines that you wish to omit when adding your product list and you can do this by **adding your product list by column**. To do so, follow the steps below:

1 Enter a **Name** that clearly defines the list.

2 Choose the **level of indent** for the list.

3 Choose if you wish the list to be **Numbered**, or if you wish to **Reset Numbering** from this list.



4 Select whether to upload any **Attachments** or whether the suppliers will be able to upload attachments when answering the question.

5 Select the method of **Assessment** for this question. Use the ❷ icon to find explanation regarding each assessment method.

6 Select the **Columns** and click **Add** to select them to appear in the questionnaire. Use the **Left** and **Right** buttons to arrange the columns in the order you wish them to appear. To remove columns, select them in the **Selected Columns** box and click **Remove**.

7 Click **Save**. The question will now appear in the Questionnaire tab.

How to Edit Content in a Questionnaire

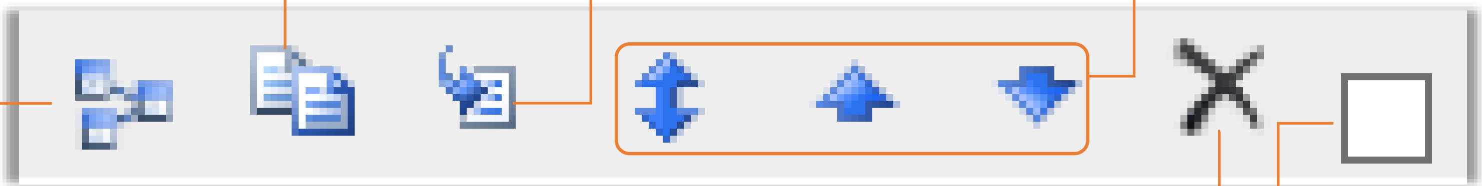
Once you have added your content to the questionnaire, you can carry out several actions on it. The buttons available allow for the following actions:

1. Show questions which enable this question.

2. Exactly Copy the question as a new question below.

3. Insert a question from the questions library.

4. Use the icon to drag and drop the question anywhere within the questionnaire, or the or icons to move the question up or down 1 space.



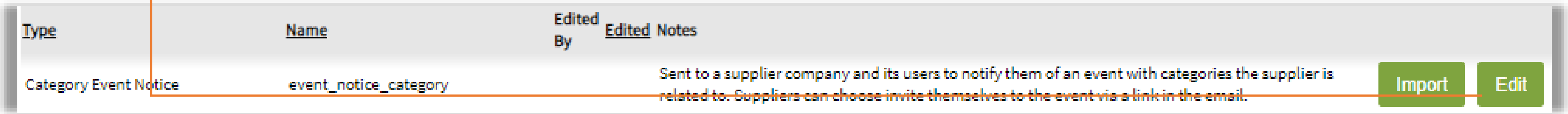
5. Delete the question from the questionnaire.

6. Select the question to action using the options at the top of the Questionnaire tab.

How to Use the Email Templates Tab

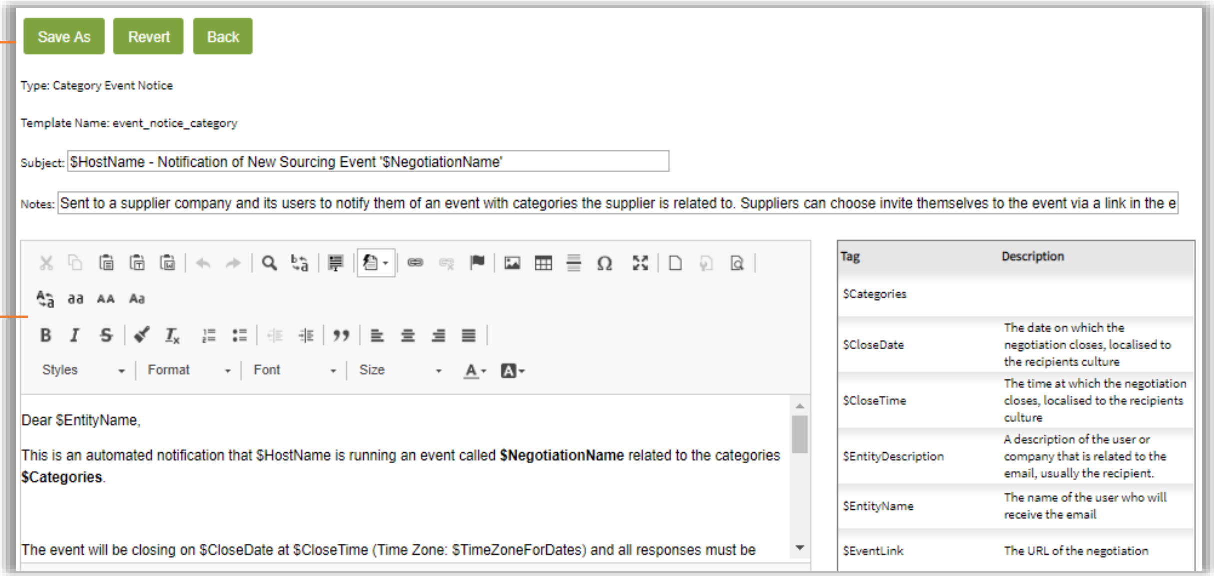
The **Email Templates tab** is where all the emails that are to be used as part of the event are stored. These include emails sent to the buyers and suppliers when certain things happen during the event lifecycle, such as a team member being notified when added to the event. **To edit a template** for the tender, follow the instructions below:

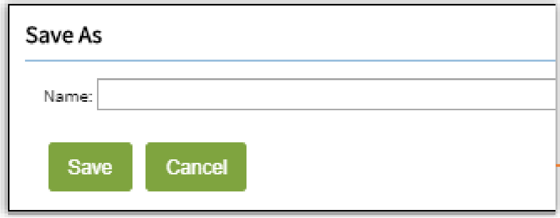
1 Select the **Edit** button on the line of the template you wish to change.



2 Make any changes to the template as necessary.

3 Click **Save As** to save the template under a new name to avoid overwriting the system template.



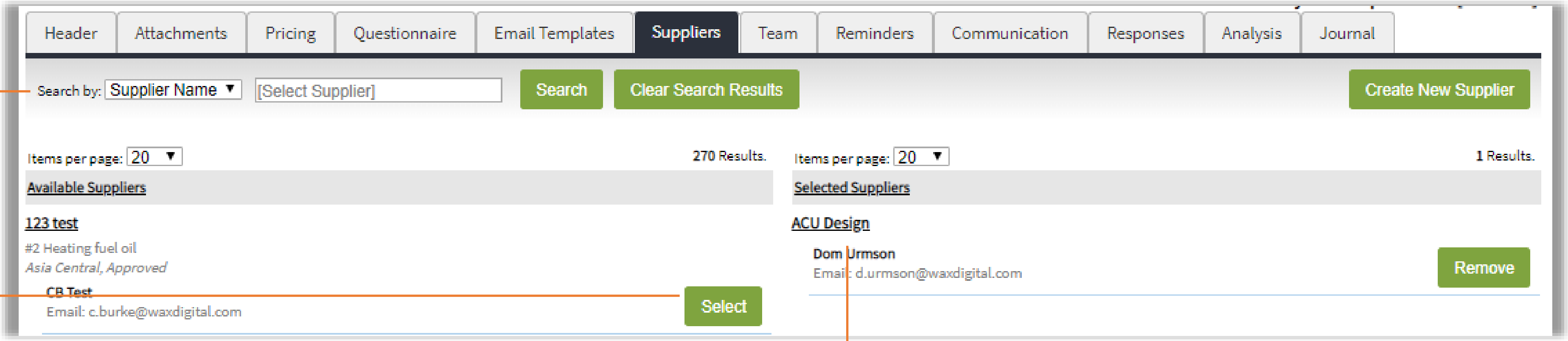


4 Enter a new name that clearly states what the email template is and click the **Save** button.

How to Use the Suppliers Tab

The **Suppliers tab** is where you add the suppliers that you wish to participate in the tender. You can add suppliers manually to the event, or if this event is following on from a previous one, this will contain the suppliers who were successfully moved on from the previous event.

1 Use the **Search Box** to search by either **Supplier Name, Contact Name, Tag** or **Category** to locate the suppliers you want.

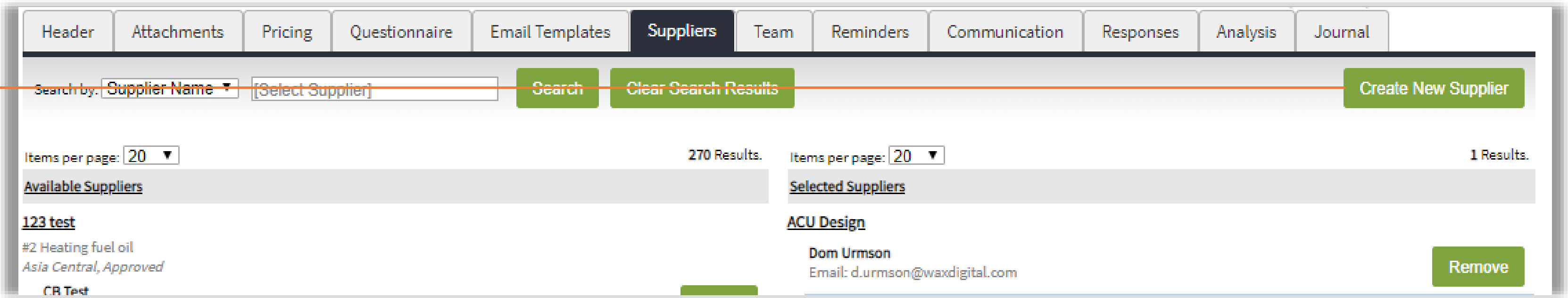


2 Click **Select** next to the supplier you wish to invite. Repeat this until you have select all of the suppliers you need to.

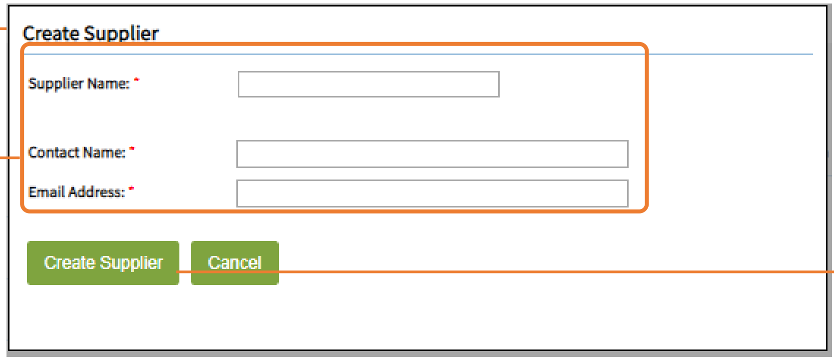
3 The supplier will now appear in the right-hand column to indicate that they are to be invited to the tender. Select the **Remove** button if you no longer wish a supplier to be invited to the event.

Note: The left-hand side column will give you the list of the suppliers that you can choose to invite to the tender and will only consist of suppliers approved within your sourcing system. To create a new supplier, follow the instructions below:

How to Create a New Supplier from within a Tender



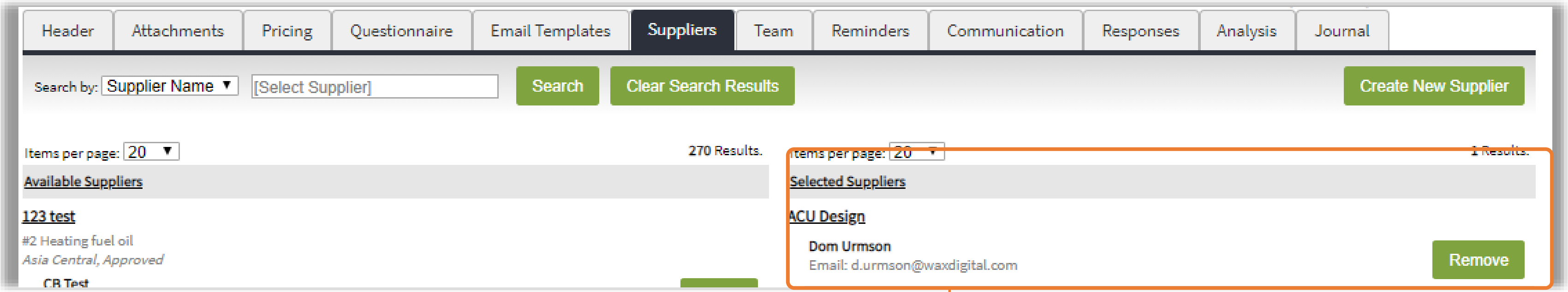
1 Click the **Create a New Supplier** button.



2 The **Create Supplier** pop up will then appear.

3 Type **Supplier Name**, **Contact Name** and **Email Address** fields.

4 Click the **Create Supplier** button.



5 The supplier will now appear in the **Selected Suppliers List** on the negotiation.

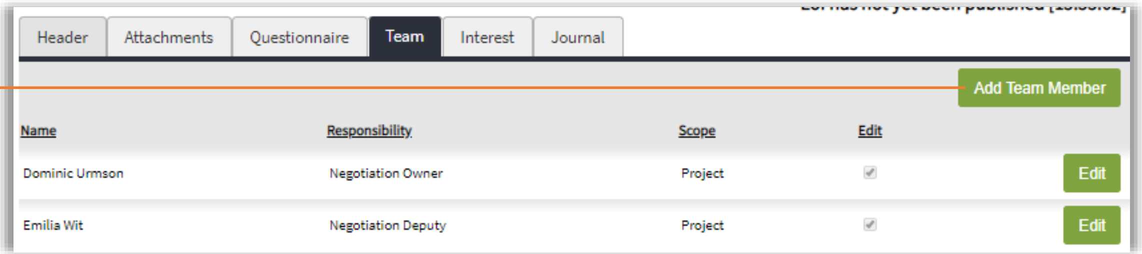
Note: The supplier's status will be **Not Approved** at this stage.
The supplier will receive a system-generated notification informing them that they have been added as a new supplier within your company. The supplier will have to follow the link to log in to the system and complete the registration form.

Note: The contact name should be that of the contact who you wish to respond to the tender from that organisation. This may change for each supplier on a tender by tender basis, allowing you to invite individuals with specialist knowledge to respond to the tender.

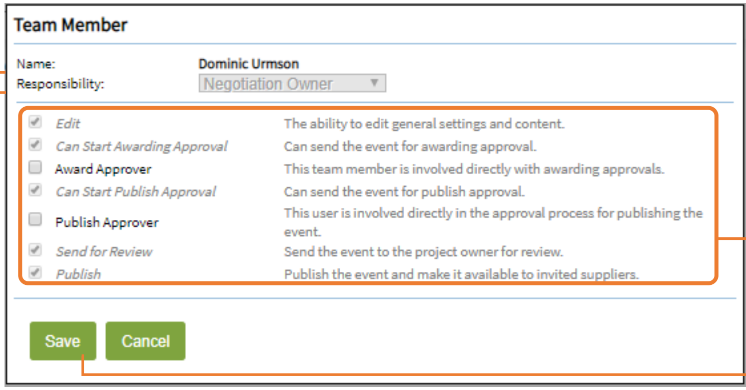
How to Use the Team Tab

The **Team tab** allows you to add other **web3** users as team members to the EoI. To do so, use the following instructions:

1 Click the **Add Team Member** button. Clicking this will result in the below pop up appearing.



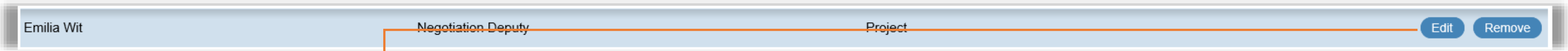
2 Select the **Name** of the team member you wish to add from the users within your system.



3 Select the level of responsibility you wish the team member to have: **Negotiation Consultant** or **Negotiation Deputy.**

4 Select whether the team member **Can Score**, what they can score and if they are a **Moderator**.

5 Click **Save** to add the supplier to the **Team Tab**.

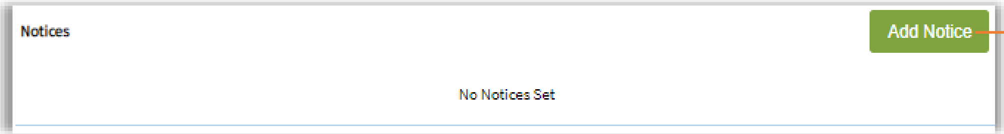


6 Once the team member has been added you can either **Edit** or **Remove** them.

Note: These actions only apply to the project and do not allow you to edit or remove the user from the system.

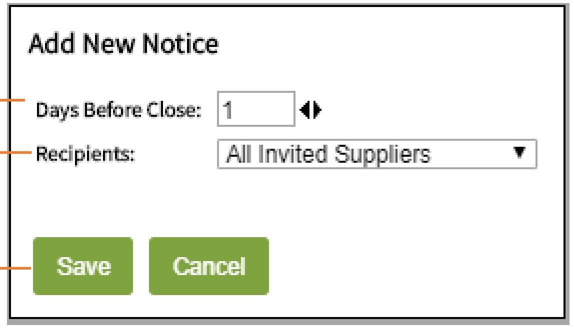
How to Use the Reminders Tab

The **Reminders tab** enables you to set automated alerts to suppliers and team members. It also allows you to create a notice, telling either all suppliers, or those who have not responded, to complete their tender response. To **add a notice**, follow the steps below:



1 Click the **Add Notice** button to open the **Add New Notice** pop up.

2 Choose how many **Days Before Close** you wish the notice to send.



3 Choose whether you want the notice to go to **All Invited Suppliers** or only **Non-Responded Suppliers**.

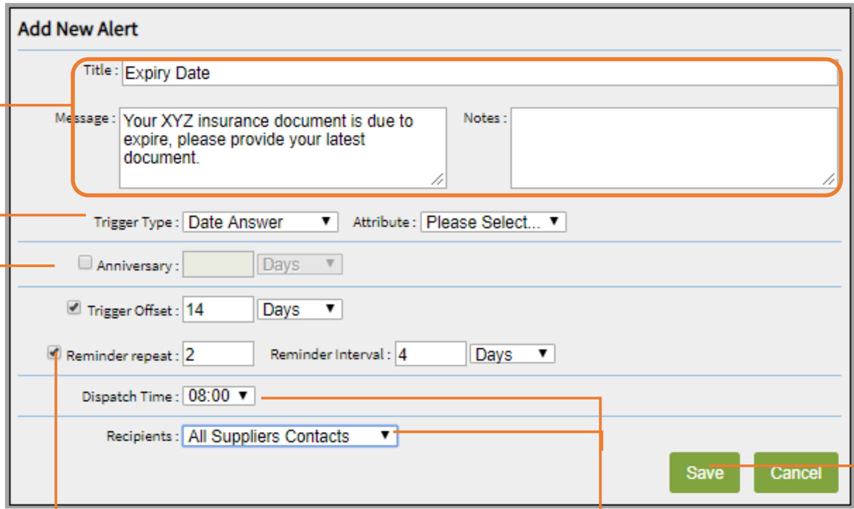
4 Click **Save** to finalise the notice. It will now appear in the Reminders tab and can be edited from here.

How to Add an Alert

Alerts can be created based on various metadata in the tender. To **create an alert**, follow the steps below:

1 Enter a clear **Title** for the alert and the **Message** you wish to send with the alert.

2 Select the **Trigger Type.** If you select **Date Answer**, then select an **Attribute** from the drop-down.



3 Choose when the alert will fire in relation to the date. Use the minus symbol to set the trigger for before the date.

4 Select if you want a reminder, how many you want and how often the reminders should fire.

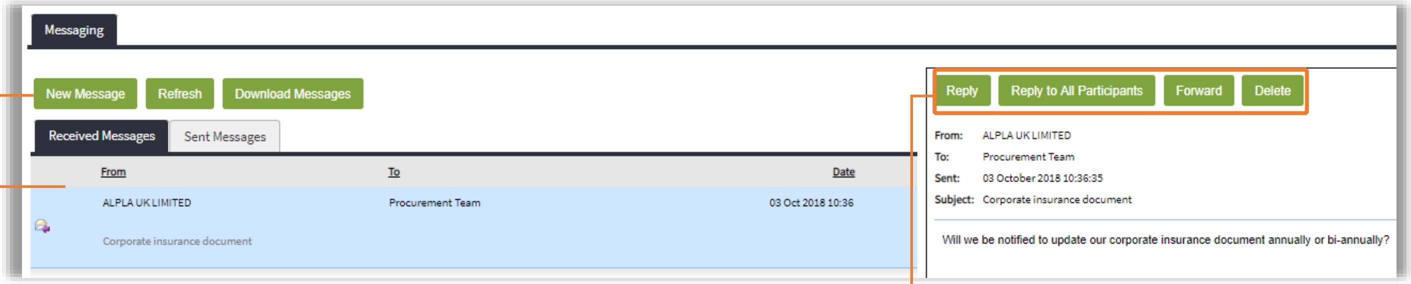
5 Choose the time of day you want the alert to be sent and who the recipients should be.

6 Click **Save** to create the alert. It will now appear in the Reminders tab and can be edited from here.

How to Use the Communication Tab

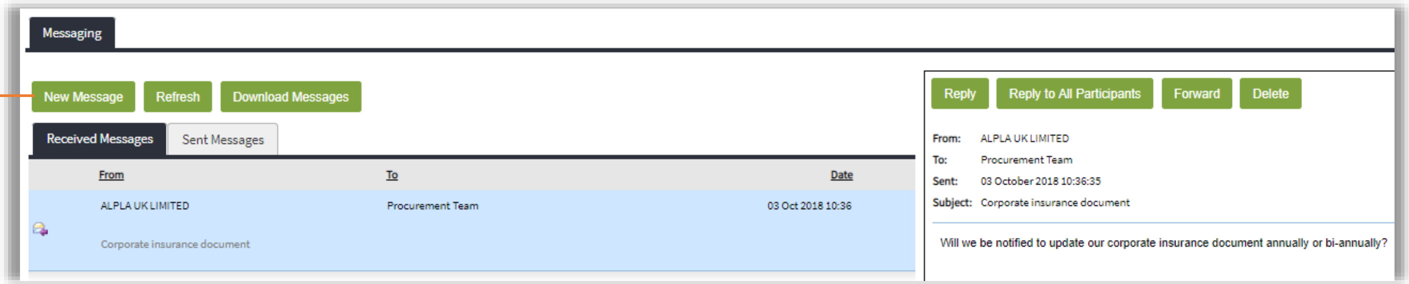
The **Communication tab** allows you to message to and from the suppliers who are taking part in the tender. To see messages that suppliers have sent to you, follow the instructions below:

1 To view your received messages, click the **Received Messages** tab. You can then select a message to appear to the right-hand side.

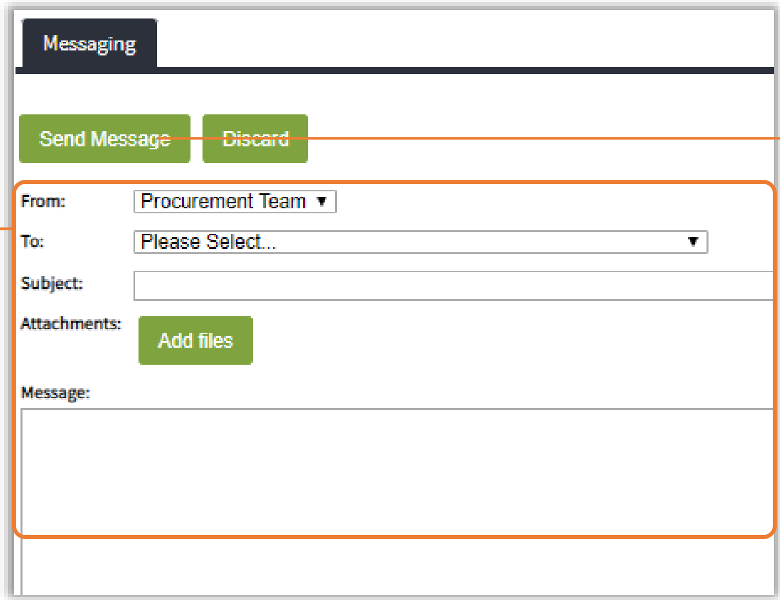


2 From here you can carry out one of the following actions:
Reply – Reply to just this supplier,
Reply to All Participants – Reply to all suppliers involved in the event,
Forward – Send this message on to another supplier,
Delete – Remove the message all together,
Create Clarification – If the supplier is querying something that the other suppliers would also benefit from knowing, you can create a clarification off the back of the message.

How to Create a New Message:



1 Click the **New Message** button to create a new message that you wish to send to the suppliers.



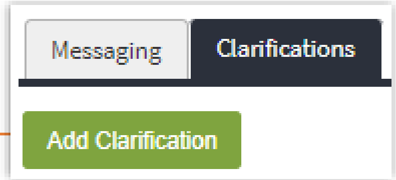
2 Enter the **Subject**, **Attachments** and the text **Message** for your message.

3 Click the **Send Message** button. Your message will now appear in the Sent Messages tab within the Messaging tab.

How to Add a Clarification

Clarifications allow for any common issues highlighted within the tender to be cleared up and sent out to all suppliers. This helps to stop common problems troubling all suppliers invited to the tender. To **add a clarification**, follow the steps below:

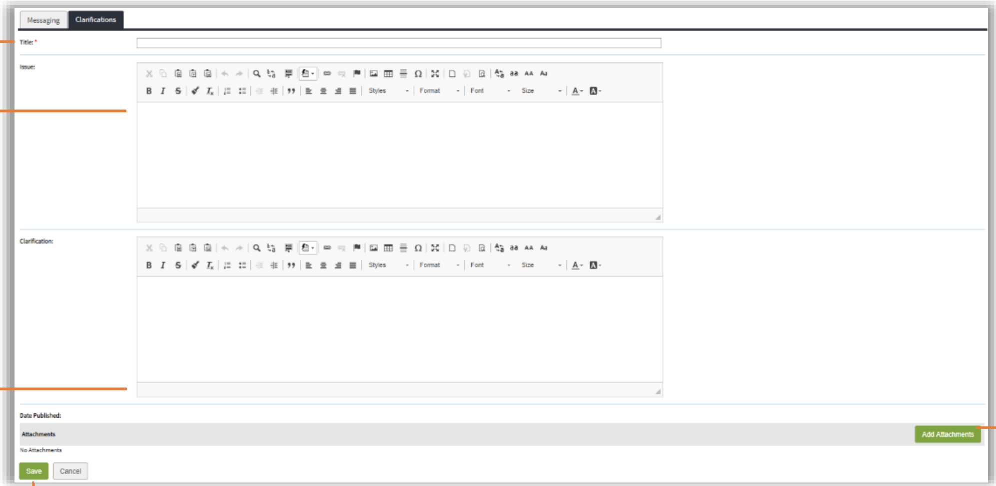
1 Click the **Add Clarification** button.



2 Enter a **Title** that clearly defines the clarification for future reference.

3 State the **Issue** that needs clarifying.

4 Add the **Clarification** to clear up the issue.



5 Add any **Attachments** that are needed to support the clarification.

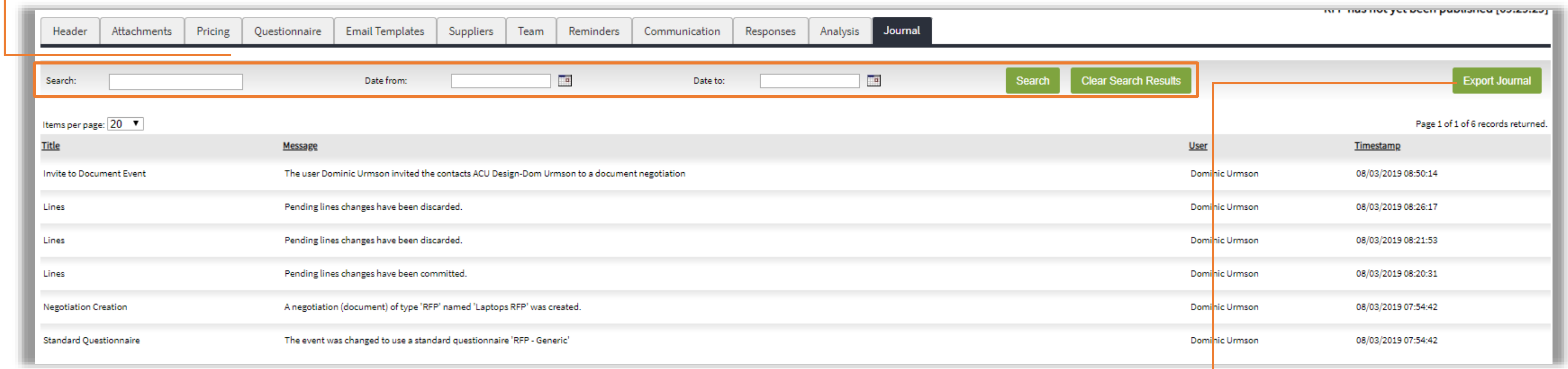
6 Click **Save** to finalise the clarification. It will now appear in the Clarification tab.

How to Use the Journal Tab

The **Journal tab** provides an audit trail of all activity from the negotiation and records both buyer and supplier activity. It helps to provide a clear view of exactly who has done what and when they have done it. To use the **Journal tab**, follow the instructions below:

1

To search the journal, enter free text into the search bar, select date parameters and click the **Search** button.



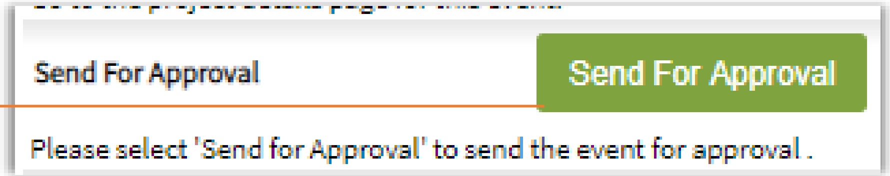
2

To export the journal for offline use, or to share with non-users of the system, click the **Export Journal** button. This will provide you with an excel version of the journal.

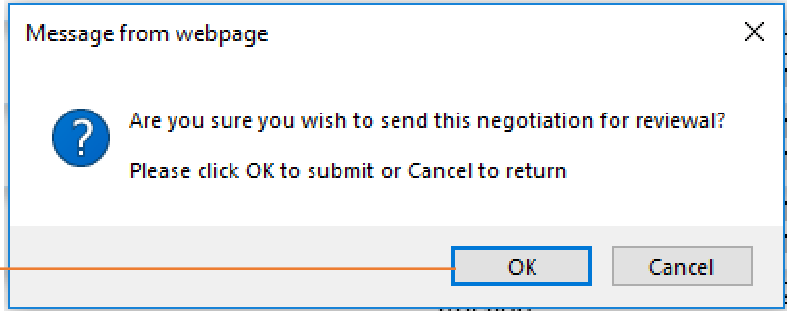
How to Publish the Tender

Once you have created your tender, formed the questionnaire and selected the suppliers, the final step is to publish your tender. If you have approvals set up within your system, you will first have to send the tender for approval. To do so and then **publish your tender**, follow the steps below:

1. On the **Header tab** from within your event, click the **Send For Approval** button on your tender.



2. Click **OK** on the subsequent pop up. The tender will now be sent to an approver, who will either approve or reject it for changes.



3. Click **Publish**. The tender will now be live and the selected suppliers will be invited to respond. From here, you can monitor your tender. Please see the relevant user guide on monitoring for this stage.