Sourcing – How to Create a Tender
User Training Guide

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Create a Tender (ITT, PQQ, RFP, RFI, RFQ)

The eRFx functionality allows the creation of a tendering/sourcing/procurement process consisting of configured or user-defined steps to form a complete project. This section details the key elements of eRFx creation.

The project can contain several events or sourcing stages. The naming of these event formats is configurable to the required terminology and process, but they all utilize the same eRFx functionality.

The default terminology is:

- **ITT:** Invitation for Tender
- **PQQ:** Pre-Qualification Questionnaire
- **RFI:** Request for Information
- **RFP:** Request for Proposal
- **RFQ:** Request for Quotation

Create a Tender

To create a Tender via the dashboard:

1. Click the eRFx format you would like initiate.
2. Choose the relevant option in the **Event For** dropdown.

Note: This is usually an entity and is permission driven, so users have access only to the **entity** they have been given access to.

3. Choose from the **Event Area** dropdown.
4. Type **Contract Value** in the field provided and click **Submit**.
5. Create a **New Project** or **Select an Existing Project.**
6. Type **Negotiation Name** and **Description.**
7. Select which event you wish to create: **RFI, PQQ, RFQ, RFP or ITT** from the **Negotiation Type** dropdown list.
8. Select from the **Event Classification** dropdown list, **Time Zone,** and **Progress From**.
9. Select **Scoring Mode** from the dropdown list.

Note: The average is based on the average of scores given to each question. The latest is the last person to apply the score. Priority and weighted are based on weighting applied to users. The average and the latest scoring modes are used most frequently.

10. If standard templates are being utilized, choose the existing, standard template questionnaire from the **Standard Questionnaire** dropdown list**.**

Note: Standard Questionnaire templates are customer-specific and administered via the **Questionnaire Library**.

11. The **Creator** and **Date Created** are auto-generated. You can edit the **Creator** once the Negotiation is saved.
12. Enter the **Closing Date** using the calendar control.
13. Click **Save Negotiation** or **Cancel**.

To create a Tender via Negotiation / Folder / Project:

1. Navigate to the **Project** folder in which you want to create the eRFX.
2. Click the **Create New Negotiation** button and move onto step 6 listed above.

Note: Once the basic set of information is captured in the Header tab, you can progress to **Event Management**.

Header Tab Requirements

Once high-level Header details are saved, the Header summary displays some event actions and shows a number of others tabs across the screen:

- Attachments
- Line
- Questionnaire
- Email Templates
- Suppliers
- Team
- Reminders
- Communication
- Monitoring
- Analysis
- Journal.

To manage elements of your eRFX:

1. Click **Event Actions.**
    a. **Edit Event**: Edit the header details for this particular event. Depending on the status of the event, some fields may no longer be editable.
    b. **View Project**: View the project details section for this event.
    c. **Move Event**: Move this event to a different project you have access to.
    d. **Copy Event:** Make a copy of this event. The new event can be within the current project or another project you have access to.
    e. **Event Currency:** Edit event currencies.

Attachments Tab

The attachments tab allows users to attach various documents to the eRFX:

- Available to suppliers on event publication requiring confirmation of acceptance prior to viewing the tender (Terms and Conditions, NDA, SLA, Payment Terms). This section can be used as a gateway to ensure suppliers agree to your terms before progressing to the actual tender document.
- Available to suppliers on event publication for download as part of the tender.
- Private File Archive for team event documents – visible only to the buying Team.
- Private File Archive – Stores all Supplier Submissions provided as part of the tender.

To Add an Attachment:

1. Select the **Attachment Type**.
2. Browse to find the document on your local drive or paste the URL.
3. Enter the **Attachment Description** in the field provided.
4. Click **Upload** or **Attach the URL**.

To complete Private File Archive:

5. Type in the **File Reference** and **Attachment Description**.
6. Browse the Document.
7. Click **Upload** button to upload the file.

Lines Tab

The lines tab allows the creation of line level attributes for price and non-price information, or data collection.

Note: Lines ONLY become visible to suppliers when they are incorporated into the Questionnaire using the Product List or Product List by Column question-type, and are not editable after publishing.

Creating Lines, Lots, and Groups

Below is an outline of the Lines structures which can be used in creating the Product List or Product List by Column type pricing matrix. For Product List content types, ONLY standalone lines are displayed.

Lines: Individual tender lines can be standalone or form a part of Lots or Groups, and can have a number of basic attributes: Image, Description, Product Code, Quantity, Unit of Measure, Historic Unit Price, Default Start Price, Mandatory, and Price.

Additional description columns can be added and be made visible to suppliers. Suppliers can enter multiple price attributes per line item provided the columns are configured as supplier editable. The suppliers can be forced to bid on all, or specific lines.

Note: Lots and Groups are only applicable to the Product List by Column content type.

To edit lines:

1. Click **Edit**.

Note: No Lots or Groups have been, or are to be, created.

2. Click the **Add Line** button.
3. Optionally, **Attach Images**, type a **Description**, browse the file, click **Upload** or click **Back to lines** to cancel.
4. Enter the line item attributes: **Description**, **Product Code**, **Quantity**, **Unit of Measure, Historic Unit Price,** and **Default Start Price.**
5. Check the **Mandatory** box, if required. This forces the supplier to enter a price.
6. Click **Commit All Changes** to save.

Lots: Sets of items are listed individually, each with their own attributes, but are bundled together for one price for the total Lot, instead of individual values for each item, is required to be entered by suppliers. To edit Lots:

1. Click **Edit**.
2. Click the **Add New Lot** button or the **Edit Lot** button, if required.
3. Click **Add Line** button.
4. Complete line items attribute. Repeat the **Add Lines** process as many times as required.
5. If **Historic** or **Start Prices** have been entered, click **Total**.
6. Click **Commit All Changes** to save.

Groups: Within a Group there must be one or more lines. You may have any number of Groups. The supplier can enter a price for each individual item within the group, but the system also displays the sum value of all items at a group level. To edit a Group:

1. Click **Edit**.
2. Click **Add Group** or **Edit Group Description**, if required.
3. Click **Add Line**, next to the **Group Description** you wish to add lines to.
4. Complete line items attribute. Repeat **Add Lines** as many times as required.
5. Click **Commit All Changes** to save.

Deleting

To delete a Line, Lot, or Group:

1. Click the **Edit** button.
2. Check the **Selected** box for the Lines, Lots, or Groups to delete or select **Delete All Lines**.
3. Click **Discard Changes** to restore changes, if required, before confirming deletions.
4. Click **Commit All Changes**.

Note: Lines, Groups, and Lots can be also be added, edited, and deleted using the Excel Export/Import template.

Excel Templates Export/Import Facility

Download Excel Templates

You can create and edit Lines, Lots, and Groups via the use of the Excel templates functionality. To download a template:

1. Click **Download Excel Examples**.
2. Select the template example you wish to use. Click **Download.**
3. Click **Save** to save to your local drive.
4. Click **Open** for viewing or restricted editing.

Notes:

- The standard columns are displayed in the template with their fixed attributes.
- The standard column headings are editable, but not the data type or options.
- You can add more columns with selectable visibility and data type options: Buyer Only, Supplier Visible, and Supplier Editable.
- There are a number of **Data Type** options available such as free text, decimal number, whole number, check box, and drop down.

To create or edit via Excel Templates:

1. Click the **Export Lines** button.
2. Click **Save** to save to your local drive. Click **Open**.
3. **To Create Lines:** Complete columns B and F to M. Add more columns if required.
4. **To Create Lots and Lot Lines:** Complete columns B to C and E for the **Lot Description** and columns D and F to M for the **Lines**.
5. **To Create Groups and Group Lines:** Complete columns B to C and E for the **Group Description**. For the Group Lines, complete columns D and F to M.
6. To delete an existing Line, Group, or Lot, set column B to [**y**].
7. Save the spreadsheet in the required format to your local drive.
8. Click **Import**.
9. Click the **Browse** button and select the file, click **Import**.
10. Click **Lot Totals,** if required
11. Click **Commit All Changes**.

Creating New Columns

User specific columns can be created within the Lines Tab. These columns are applied to all lines within the event. The user defined columns can then be made visible to suppliers using the Product List By Column content type within the Questionnaire tab.

The creation of user defined attributes and questions allow multiple data collection tables to be created using the lines functionality in combination with the Product List by Column content type.

To Create a new column:

1. Click the **Edit** button, then the **Add Column** button**.**
2. Type in a column **Title**, select **Data Type**, and complete **Data Type** specific attributes.
3. Set **Default** field, if required.
4. Set **Score**, if required.
5. Set **Supplier Access**:
    a. **None**: Visible ONLY to buyer.
    b. **Read Only**: Visible to Suppliers.
    c. **Answerable**: Visible to suppliers and requires suppliers to provide their input.
6. Click **Save**.

Edit Column Name

To edit Columns:

1. Click the **Edit** button.
2. Click the **Column Heading** link to edit.
3. Make changes and click **Save**.

Note: You can ONLY edit columns when event is in **Draft** status.

Email Templates Tab

The web3 system has a functionality that allows users to format text into an HTML email. Tags and system data fields can be added to the text to automatically apply system, negotiation, and user specific information.

The Email Templates tab contains a list of negotiation-specific templates. There are two options available for each template:

- Import
- Edit

To edit a template:

1. Click the **Edit** button next to the template you want to personalize.
2. Make required changes.
3. To revert to the original format, click the **Revert** button or click **Save As**.
4. Type the **Name** of the amended template and click **Save**.

To modify or delete edited template:

1. Click the **Edit** button next to the template you want to modify and make changes in the body of the template.
2. Click **Delete** to delete the template and revert to the default name and format.
3. Click **Save** to save under the same name or the **Save As** button to rename.
4. Click **Back** to exit the email template editor.

Reminders Tab

The Reminders tab enables users to set automated alerts to suppliers and team members invited to the negotiation and are based on date parameters.

The available alert types are:

- Single Buyer
- Event Team
- All Suppliers Contacts
- Invited Supplier Contacts

To Add an alert:

1. Click the **Add Alert** button.
2. Type in **Title, Message,** and **Notes.**
3. Select **Trigger** type**, Anniversary, Offset.**
4. **Reminder repeat, Reminder Interval**
5. Enter **Dispatch Time** fields.
6. Select **Recipients** from dropdown**.**
7. Click **Save**.

To Edit an Alert:

1. Click **Edit** next to the Alert.
2. Modify required information.
3. Click **Save**.

Communication Tab

The inbuilt messaging facility allows users to exchange messages with suppliers and internal stakeholders. The messaging is active for published and closed negotiations. For a supplier to view the message they must have access to the negotiation. Users are notified of the new message via an automated e-mail to their registered email and should logon to the system to view the message.

When a buyer receives a message from a supplier, they can opt to respond directly or via a clarification response which enables all suppliers to view the response. Alternatively, a new clarification can be created and published.

Upon publishing the clarification item, all suppliers receive an auto-generated notification alerting them of the new clarification item. Notifications are also displayed on the dashboard.

To send a Message:

1. Click the **New Message** button.
2. Select **From** and **To.**
3. Type **Subject** and **Message** content.
4. Optionally, click the **Choose file** button to add an attachment.
5. Click **Send Message** or **Discard**.

All communication is stored in the system. You can review your **Received** and **Sent Messages** at any time.

To send a clarification to all suppliers:

1. Click **Clarifications** and **Add Clarification.**
2. Type **Title**, **Issue,** and **Clarification**.
3. Optionally, click **Choose file** to add an attachment.
4. Click **Save.**

To edit a Clarification:

1. Click the **Clarification** link.
2. Click **Edit** or **Delete**.
3. Update the required information and click **Save**.