Secure Source to Pay (SS2P)

Sourcing – Evaluating an eAuction and Tender

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Evaluating an eAuction and Tender

This section describes event monitoring activities a user can perform once a Tender/eRFx or eAuction has been reviewed, approved, and published. Upon publishing the event, the invited suppliers receive automated notifications to respond to the negotiation.

In the case of the eRFx suppliers can start submitting their responses once they receive a notification. In the case of an eAution, bids can only be submitted on the eAuction open date and time.

There are several areas within the Sourcing application that can facilitate the management and progress monitoring of an eRFX, and an eAuction. These areas are:

- Monitoring Tab – eAuction
- Monitoring Tab – eRFx
- Analysis Tab

Monitoring eAuction

The monitoring of an open eAuction is a time critical activity. The monitoring tab is available before the open time and date. For the ease of use, the monitoring screen allows a number of critical activities to be monitored from one single screen. There is an additional screen which drills down into the line level detail of the auction structure, if required.

Overview of eAuction Monitoring Screen

. The monitoring screen of a Published live eAuction is split into three main areas:

- **Alerts**: displays alerts, team and supplier activity, and eAuction status.
- **Live Participating Suppliers**: displays a list of participating suppliers, their live status, and activity summary within the system once logged in.
- **Auction structure and bid summary**: displays the auction structure and summarizes **Lots**, **Groups**, individual lines, and bidding details.

eAuction Monitoring Tab (Live Auction)

Once the eAuction is published and open, the countdown clock on the top right corner of the screen will display **Time Remaining**, and additional functions become active on the monitoring tab.

The functions available to the negotiation owner, editor, and super user are:

- **Close Auction**: Closes the auction on all lines and all participants.
- **Pause Auction**: Pauses the time remaining until auction close. No bids can be placed.
- **Resume Auction**:. Reopens the auction to bidding and releases the time remaining to count down to auction close. (Only available on a paused auction)
- **Extend by X minutes**: Extends the closing time of auction by the time set in the controls tab. This is only valid when the final time period is entered.
- **Open in New Window**: Opens the auction monitoring screen in another window.

- **Export Auction Data**: Exports all received bids and auction summary information.
- **Close Line**: Closes the line to any further bids. This is only visible via the **View** link next to each line on the monitoring screen.

Line or Lot Level View

Additional actions can be taken on the auction from the line-level view. When moving from the summary overview to the line-level view, the following actions are available:

- Close line
- Graphical display of bids by Line, Group Total, Lot Total, or auction Total
- Delete supplier bids**. Note**: Supplier bids cannot be deleted from the secondary window, which is opened by clicking **Open in New**.

By placing the mouse cursor over the supplier's bid on the graph, the value and date/time of the bid will display.

To Export Auction Data

In the bid table detail, you can choose which bids to show in the table. You can download all bids submitted in the auction in an Excel format at any point during or after the auction period by clicking **Export Auction Data**.

To open the eAuction monitoring tab in a new window

1. Navigate to the **Monitoring** tab.
2. Click the **Open in New Window** button.
3. The new window displays.

The current view will be replicated in the **New** window.

To modify the Control settings during an auction:

1. Navigate to the **Controls** tab.
2. Modify the required parameters.
3. Click **Save Control Changes**.

To Pause and Resume an auction:

1. Under an open auction **Monitoring** tab click the **Pause Auction** button.

Note: Whilst the auction is paused, no bids can be made.

2. To re-open auction to complete the remaining auction time, click the **Resume Auction** button.

To extend the close time of an Auction:

1. Click the **Extend to X minutes** button under the auction **Controls** tab.
2. Set the close time to the required time in the future.
3. Click the **Save Control Changes** button.
4. The auction will close when the additional remaining time is zero.

To Close an Auction:

1. Click the **Close Auction** button.
2. Confirm close of auction in the popup OR navigate to the **Controls** tab.
3. Set the close time to a short time in the future.
4. Ensure the **Automatically extend by** option is unchecked.
5. Click the **Save Control Changes** button.
6. The auction will close when the remaining time is zero.

Monitoring an eRFx

The **Monitoring** tab provides an overview and status of the supplier responses to the questionnaire.

The eRFx Monitoring facility is an effective way to monitor supplier participation throughout the tender process, where there are no regulatory (EU or other governmental regulations), process (**Sealed Tender**), or procedural (company policy and procedures) bars to viewing a summary of suppliers' responses prior to the close of the tender.

Note: Certain versions of Wax Digital web3 eSourcing do not allow the buyer to view supplier responses until the eRFx close date and the electronic release of the tender responses.

Monitoring an eRFx with no question scoring or sections with weightings

The **Monitoring** tab provides an overview of the completeness of any eRFx responses submitted by suppliers, even if no question scoring or section weightings have been applied within the questionnaire.

The following conditions may be presented in the Monitoring tab:

- If a supplier submitted a response, the **Responded** column will display as ticked.
- If a **Mandatory** question, a **Required Answer,** or a **Single Check Box** question has been set, the supplier's response will be summarized.
- If a supplier fails to respond to a mandatory question, it will be highlighted in the **Unanswered Mandatory Questions** column.
- If the supplier has not responded with a **Required Response, OUT** status will display.

Download Responses and Attachments

Supplier responses and attachments can be downloaded from the Monitoring tab. To download All Suppliers Responses and Attachments:

1. Go to the **Monitoring** tab.
2. Click the **Download All Responses** button.
3. Confirm **OK** in the pop-up window.
4. Click **OK** on the confirmation pop up.
5. An automated e-mail is sent containing the link with all supplier responses.
6. Upon receipt of the email, click on the active link. A new browser window will open.

7. Enter your username and password. Click the **Download** button.

Note: Allow file downloads in your browser window. Save the zip file to your local drive.

View supplier responses which include attachments

To view supplier responses that include attachments:

1. Click the **PDF** button to view a PDF version of the supplier's response OR click the **Suppliers Name** button (first column).
2. Click the **Download Response** button. This will generate a download file just for this supplier response. Follow the steps as above.
3. View supplier attachments by clicking the **View Attachments** button next to the attached file you wish to view.

Note: Highlight the selected answer types: Unanswered Mandatory Questions, Required Answer Failure, or Requires Manual Scoring.

Monitoring an eRFX with question scoring or sections with applier weightings

Where scores were assigned to questions and/or responses, the summary of the monitoring information available is as follows:

- **Score**: The supplier's total score as a percentage of the maximum total score available.
- **Marks**: Total number of marks scored over the maximum total score available.
- **Responded?**: A tick box indicates a supplier submitted a response.
- **Passed (score)**: Supplier passed the **Document Pass Mark** [set as a % in the Header tab].
- **OUT**: Indicates a supplier has not given a required response.
- **Unanswered Mandatory Questions**: Shows the number of unanswered mandatory questions.
- **PDF**: View a PDF version of the supplier's response.
- **Scoring**: Scores can be given for question responses requiring manual scoring. This is covered in the subsequent sections of this User Guide.

1. Click name link to see the supplier response.
2. Click PDF button to see PDF version.
3. Click Scoring button to input manual scores.
4. Supplier OUT due to not providing a required answer to a question.

To view a summary of Suppliers scores:

1. Click on the **Score Matrix** button.
2. Select **Group By** display option**: Section** or **Level 2 Header**.
3. The results table displayed can be exported to excel by clicking the **Export Results** button.

To Export RFx Data:

1. Click the **Export RFx data** button.
2. Click **Save** to save the file to your local drive. Click **Open** to view the data.

The Excel download example is shown below:

Analysis Tab

Navigate to the **Analysis** tab to view and download the **Tender** results. There are a number of predetermined filters you can apply from the Analysis screen, and users can choose to view the results in different graph formats. It is also possible to export all the reports as .png and .xls. file formats.

