Secure Source to Pay (SS2P)

Sourcing – How to Create an Expression of Interest (EoI)

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Overview

The Expression of Interest (EOI) or Opportunity functionality allows the publication of an event-specific hyperlink. This link directs suppliers to externally facing information about the specific event and the means to register interest. This does not require suppliers to have access to the system.

While this process forms part of the public procurement processes, it can be used to capture supplier's details at a category, location, or project specific level. The EoI can be linked into a Supplier Registration Form, Pre-Qualification Questionnaire, or eRFx format.

Publication of the tender project specific hyperlink to the Official Journal of the European Union, or other sites, is not currently available within web3 eSourcing. Integration with the eSender services or other publication services are available on a client by client basis and is subject to commercial discussion.

You can create an EoI:

- Via Negotiations side link
- Via Quick Links
- Within an existing Project Folder
- By copying a previous event

On creating the EOI, a series of tabs are visible:

- **Header**: Descriptive information and categorization
- **Attachments** (optional): Internally visible and externally visible file attachments
- **Questionnaire**: User defined content
- **Team**: Team members and role setting
- **Journal**: Audit journal of all folder and event significant activity

Creating an Expression of Interest (EoI)

To create an EoI:

1. Navigate to the desired project folder. You can do this via the Quick links, if configured to accommodate EoI, Quick Browse, or the **Negotiations** link.
2. Click the **Create New Negotiation** button.
3. Type in the **Negotiation Name** and **Description**.
4. Select an EoI from the **Negotiation Type** dropdown.
5. Choose the **Event Classification** from the three available options:
    a. Live
    b. Test
    c. Training
6. Choose the **Time Zone** and **Progress From**, to define the start progress.
7. Select the questionnaire template.

Note: Standard Questionnaire templates are client specific and are configured during system implementation phase. Templates are administered via the **Questionnaire Library**.

8. The **Creator** and **Date Created** are automatically generated fields.

Note: You can edit the **Creator** once the EoI is saved.

9. Enter the **Closing Date** using the calendar control.
10. Click **Save Negotiation** or **Cancel** to cancel.

To manage your EoI event:

1. Upon creation of the **EoI Header** summary, you have the ability to configure five tabs that make up your EoI: **Header**, **Attachments**, **Questionnaire**, **Team** and **Journal**.

2. Click **Generate Supplier Link** to check the URL of your EoI.

Note: the link is only active once the event is published.

3. You can manage the following elements of your EoI through the **Event Actions**:
    a. Edit Event
    b. View Project
    c. Notify Suppliers
    d. Move Event
    e. Copy Event
    f. Preview Notice
    g. View Interest
    h. Event Currency

Attachments Tab

The attachments tab allows the attachment and storing of EoI supporting documentation. The attachments are:

- Available to suppliers on event publication requiring confirmation of acceptance.
- Available to suppliers on event publication for download as part of the tender.
- Private File Archive for team event documents – visible only to the Team.
- Private File Archive – Record of Supplier Submissions.

Attachments (Visible to Suppliers)

1. Select a file or URL from the **Attachment Type** dropdown list.
2. Browse the document on your local drive or paste the URL.
3. Enter an **Attachment Description**.
4. Click **Upload** to upload the file, or **Attach** to insert the URL.

Private File Archive (Visible to Buyers/Procurement Team)

1. Type in the **File Reference** and **Attachment Description**.
2. Browse to locate the document on your local drive.
3. Click **Upload** to upload the file

Questionnaire

The Questionnaire tab allows the creation of the web-based documents that can incorporate various question types. You can attach files of different formats, both for the questions and responses. You can assign scores to questions and their responses, and you can assign the sections of questions weighting (For example, Finance section amounts to 20% of the overall evaluation criteria).

You can create the questionnaire online or offline via the Excel export/import functionality. You can create libraries of question content and standard templates, and used to drive standardized sourcing methodology and increase procurement process efficiency and effectiveness. The questionnaire can take the form of a tender document, request for quote or information. You can view the created questionnaire online and in a PDF format, which can be printed.

1. Click **Import** or **Export** to import or export a Excel File.
2. **Manage the Questionnaire**:
    a. Attribute Editor
    b. Use Standard Questionnaire
    c. Modify Library
    d. Add Selected to Library
    e. Preview PDF
    f. Delete Selected
    g. Select All
3. Select **Click here to add new content** or select **Click here to add from library**.

To Export

To export a questionnaire:

1. Click the **Export** button.
2. Check your **Downloads** folder for the questionnaire.

Create New Content from Import

1. Click the **Import** button.
2. Click the **Browse** button, locate your saved document, and select file to upload.
3. Once you select the file, click the **Import** button to import the saved document.

Attribute Editor

Attribute Editor allows the creation and assignment of attribute data fields for Alerts, and Notifications Workflow. This functionality facilitates linking and identification of question responses to defined data fields.

To manage an attribute:

1. Click the **Attribute Editor** button.
2. Click the **Add New Attribute** button.
3. Enter the **Key** and **Description** fields, and click **Create Attribute**.
4. Click the **Edit** button to edit.
5. Update the **Description** of the attribute, and click the **Update Attribute** button.
6. To return to the **Questionnaire** page, click **Close Attribute Editor**.

Use of Standard Questionnaires

Standard templates are a powerful tool to drive efficiencies within an organization. They can significantly increase user adoption, aid enterprise visibility, best practice sharing, and facilitate efficient and compliant sourcing processes.

To create new content from the **Standard Questionnaire Library:**

1. Click the **Use Standard Questionnaire** button.
2. Select the **Standard Questionnaire** in the dropdown you wish to add.
3. Click the **Insert** button.

Modify Library

You can use the question library to store content elements that you can embed into the EoI document, instead of having to create a new questionnaire. Organize the library using folder and sub-folder structure to ensure users always know where to find activities in the system.

There are two standard libraries available:

- **My Library**: The user's own library, which they can add standard content to and edit.
- **Global Library**: Available to all users, which is administered by a super user. A super user can add and edit content to both libraries.

The **Modify Library** function allows the user to create folders and sub-folders to add and store standard content elements. It also allows the user to delete folders and content within the folders.

To manage folders in the library:

1. Click the **Modify Library** button.
2. Highlight the root folder in which you wish to create the folder.
3. Type in the **Folder Name**.
4. Check the box if you want to make this folder a **Standard Questionnaire Folder**.
5. Click the **Save** button.

To edit a library folder contents:

1. Expand the folder which contains the content you wish to edit.
2. Highlight the content element.
3. Change the content element name or delete it.
4. Click **Save**.

Add Content to Library

To add a content to the library:

1. Hover over the box of the question you wish to add to the Library, click the **Select All** button, or click the **Insert from Library** icon.
2. Click **Add Selected to Library**.
3. Navigate into the library folder you want to add the content to.
4. Click **Add Questions in this Folder**.

Preview PDF

To download a PDF:

1. Click the **Export** button.
2. Locate the file in your Downloads folder in your local drive.

Other Options

To access others options:

1. To delete content: select the content and click the **Delete Selected** button or click the **x** button.
2. Click the **Select All** and **Delete Selected** button to delete all or **Add to the Library** button to add to the library.

Creating a Questionnaire

There are a number of options within the following two sections you can use to build an online questionnaire:

- Document Formatting
- Question Formats

Note: You can edit all questions added and saved at a later stage by hovering the mouse cursor over the specific question and selecting **Edit**.

For each content element there are attributes that can be assigned to them covering formatting and functionality. These attributes are displayed as a form, adjacent to the **Content** selection field.

Overview

You can edit the questionnaire document and content elements in two ways:

1. Edit the individual content elements online.
2. Export the questionnaire template, creating the questions off-line and importing back into the system.

To edit a content element:

1. Select the content element you want to edit and place the mouse cursor over that question.
2. The system displays a box with some options allowing you to make changes to this question.
3. Click the **Insert Below** button.
4. Click the **Edit** button to edit the content element.

You have the following icons available:

- **Show questions which enable this question** feature allows for the answers of the question to determine whether a linked question gets enabled. This is only available for question types with answer options and automated scoring.
- **Copy Below** feature creates a copy of the selected content element.
- **Insert from library** displays a popup window allowing the user to insert questions from the standard questionnaire library.
- **Drag this question up or down** to reposition question.
- The **Move Up** and **Move Down** buttons allows you to move the question up or down one place at a time.
- **Delete this element** button to delete questions.

- **Select Element** to select.

To add new content:

1. Select **Click here to add new content**.
2. Select a **Question Type** from the dropdown.
3. Type in **Question Text**.
4. Determine the **Indent** levels.
5. Select whether the question is **Numbered**, **Mandatory,** or to **Reset Numbering**.
6. Assign the answer a **Score**.
7. Add **Columns**.
8. Add, move or delete answer options.
9. Add **Attachments** for suppliers to review as part of the question.
10. Check the **Required Answer** box if necessary.
11. Allow suppliers to add **Attachments** to this question.
12. **Save** or **Cancel** progress.

Document Formatting

To add a document title:

1. Select **Click here to add new content**.
2. Select **Title** from the **Type** dropdown.
3. Enter the **Title** text field.
4. Click the **Save** button or Cancel button.

Note: The title is displayed across the width of the whole page. If the author's name, date or any further details need to be added to the title, it is recommended to use a paragraph content type underneath the title to display these details.

To insert a header and indents:

1. Select **Click here to add new content**.
2. Select Header1, Header2, or Header3 accordingly from the **Type** dropdown.
3. Enter the **Heading** text field.
4. Click the **Save** button or Cancel button.

Note: The three header options allow for text format and automated numbering. The indent option spaces the text by two fixed characters per indent level. The system allows up to 10 levels and 20 character spaces.

To add a label:

1. Select **Click here to add new content**.
2. Select **Label** from the **Type** dropdown.
3. If necessary, number or bullet the label by selecting the appropriate checkboxes to the right of the screen.
4. Enter the **Label** text field. You can format for bold or italic text by clicking the appropriate icons.
5. Click the **Save** button or **Cancel** button.

To add a paragraph:

1. Select **Click here to add new content**.
2. Select **Paragraph** from the **Type** dropdown.
3. If necessary, number or bullet the paragraph by selecting the appropriate checkboxes to the right of the screen.
4. Enter the **Paragraph** text.
5. Click the **Save** button or **Cancel** button.

Note: Label and Paragraph options are similar in their function, but the key difference is the ability to allow buyer attachments and supplier uploads in the Paragraph type. The Paragraph content element also has a larger visible text entry field.

The system allows the use of the **Rich Text Edit** functionality, enabling the customization of text including font, color, size, italics, underline, bulleted lists, and bold formatting.

To add attachment upload type question:

1. Select **Click here to add new content**.
2. Select **Question: Attachment Upload** from the **Type** dropdown.
3. Suppliers can attach files as part of their response to the question, but are restricted to a particular type of file, or all files. Choose the appropriate option from the dropdown list.
4. Click the **Save** button or **Cancel** button.

Note: The purpose of this question type is to request suppliers to upload attachments to the tender. This functionality is available for most of the available question types, but here the request for attachment upload is not linked to any other questions and so can act as a simple document upload request.

To add a free text type question:

1. Select **Click here to add new content**.
2. Select **Question: Free Text** from the **Type** dropdown.
3. If necessary, indent the question.
4. If necessary, number the questions by selecting the appropriate checkboxes to the right of the screen.
5. If necessary, select the **Mandatory** box to the right of the screen.
6. Enter the question text and format accordingly using the formatting options.
7. You can restrict the size of the free text response to a specified number of characters. If this applies to the question added, enter the character limit in the text box provided.
8. You can restrict the area of the free text response to a specified number of rows. If this applies to the question added, enter the number of rows in the text box provided.
9. Enter the score to the question in the text box provided.
10. If necessary, attach a file for the supplier to view.
11. Suppliers can attach files as part of their response to this question, but you can restrict them to a particular type of file by selecting the appropriate option from the dropdown. You can restrict the size of an attachment by selecting the file size from the options provided, or you can disable the attachment option.
12. Click the **Save** button or **Cancel** button.

To add a drop down list type question:

1. Select **Click here to add new content**.
2. Select **Question: Dropdown** from the **Type** dropdown.
3. If necessary, indent the question.
4. If necessary, number the questions by selecting the appropriate checkboxes to the right of the screen.
5. If necessary, select the **Mandatory** box to the right of the screen.
6. Enter the question text and format accordingly using the formatting options.
7. Type in the first answer option for the dropdown list in the text box labelled **Answer 1**. If necessary, assign a score to the answer by entering in the score field.
8. Click the **+** icon to add a second dropdown list answer, and continue the same process.

Note: You can move the answer fields up or down by clicking the up or down arrow icons, and you can delete the answer field by clicking the **X** icon.

9. If necessary, attach a file for suppliers to view.
10. Suppliers can attach files as part of their response to this question, but you can restrict them to a particular type of file by selecting the appropriate option from the dropdown. You can restrict the size of an attachment by selecting the file size from the options provided, or you can disable the attachment option.
11. Click the **Save** button or **Cancel** button.

Note: A dropdown question format displays the response options in a dropdown list. Only a single response can be selected.

To add a checkbox list type question:

1. Select **Click here to add new content**.
2. Select **Question: Checkbox** from the **Type** dropdown.
3. If necessary, indent the question.
4. If necessary, number the questions by selecting the appropriate checkboxes to the right of the screen.
5. If necessary, select the **Mandatory** box to the right of the screen.
6. Enter the question text and format accordingly using the formatting options.
7. If necessary, specify the number of columns to create a matrix of checkboxes, otherwise leave as the default of 1.
8. Enter the checkbox option in the text box labelled **Answer 1**. If necessary, assign a score to the answer by entering in the score field.
9. Click the **+** icon to add more checkbox answers.

Note: Click the up or down arrow icons to move the checkbox answers, and you can delete a checkbox row clicking the **X** icon.

10. If necessary, attach a file for suppliers to view.
11. Suppliers can attach files as part of their response to this question, but you can restrict them to a particular type of file by selecting the appropriate option from the dropdown. You can restrict the size of an attachment by selecting the file size from the options provided, or you can disable the attachment option.
12. Click the **Save** button or **Cancel** button.

Note: The check box question type displays the response options as a list with check boxes. For a single option checkbox, please see the Single Check Box section described below in this guide.

To add a radio button type question:

1. Select **Click here to add new content**.
2. Select **Question: Radio Button** from the **Type** dropdown.
3. If necessary, indent the question.
4. If necessary, number the questions by selecting the appropriate checkboxes to the right of the screen.
5. If necessary, select the **Mandatory** box to the right of the screen.
6. Enter the question text and format accordingly using the formatting options.
7. If necessary, specify the number of columns to create a matrix of radio buttons, otherwise leave as the default of 1.
8. Enter the first radio button answer option in the text box labelled **Answer 1**. If necessary, assign a score to the answer by entering in the score field.
9. Click the **+** icon to add more radio button answers.

   Note: Click the up or down arrow icons to move the radio buttons, and you can delete a radio button row clicking the **X** icon.
10. If necessary, attach a file for suppliers to view.
11. Suppliers can attach files as part of their response to this question, but you can restrict them to a particular type of file by selecting the appropriate option from the dropdown. You can restrict the size of an attachment by selecting the file size from the options provided, or you can disable the attachment option.
12. Click the **Save** button or **Cancel** button.

Note: The radio button question type is a variation of the check box type question. The difference being, there is only a single response allowed. The responses can be displayed in columns if there are many response options, or if you wish to group response options.

To add a single checkbox question type:

1. Select **Click here to add new content**.
2. Select **Question: Single Checkbox** from the **Type** dropdown.
3. If necessary, indent the question.
4. If necessary, number the questions by selecting the appropriate checkboxes to the right of the screen.
5. If necessary, select the **Mandatory** box to the right of the screen.
6. Enter the question text and format accordingly using the formatting options.
7. An option is available to assign the score only if a particular checkbox setting was provided (i.e. ticked, or unticked). Leave the default of N/A if the **Only pass if** option is not applicable.
8. If necessary, attach a file for suppliers to view.
9. Suppliers can attach files as part of their response to this question, but you can restrict them to a particular type of file by selecting the appropriate option from the dropdown. You can restrict the size of an attachment by selecting the file size from the options provided, or you can disable the attachment option.
10. Click the **Save** button or **Cancel** button.

To add a numeric answer type question:

1. Select **Click here to add new content**.
2. Select **Question: Numeric Answer** from the **Type** dropdown.
3. If necessary, indent the question.
4. If necessary, number the questions by selecting the appropriate checkboxes to the right of the screen.
5. If necessary, select the **Mandatory** box to the right of the screen.
6. Enter the question text and format accordingly using the formatting options.
7. If necessary, assign a score to the answer by entering in the score field.
8. If necessary, attach a file for suppliers to view.
9. Suppliers can attach files as part of their response to this question, but you can restrict them to a particular type of file by selecting the appropriate option from the dropdown. You can restrict the size of an attachment by selecting the file size from the options provided, or you can disable the attachment option.
10. Click the **Save** button or **Cancel** button.

To add a validated data type question:

1. Select **Click here to add new content**.
2. Select **Question: Validated Data** from the **Type** dropdown. Select the data type.
3. If necessary, indent the question.
4. If necessary, number the questions by selecting the appropriate checkboxes to the right of the screen.
5. If necessary, select the **Mandatory** box to the right of the screen.
6. Enter the question text and format accordingly using the formatting options.
7. If necessary, assign a score to the answer by entering in the score field.
8. If necessary, attach a file for suppliers to view.
9. Suppliers can attach files as part of their response to this question, but you can restrict them to a particular type of file by selecting the appropriate option from the dropdown. You can restrict the size of an attachment by selecting the file size from the options provided, or you can disable the attachment option.
10. Click the **Save** button or **Cancel** button.

Note: The system supports data types such as UK supplier Bank Account Number, VAT number, Email Address, Telephone Number, Post Code, etc. This information can be checked, and on request, punched out to company house to check the information the supplier provided is legitimate.

To add a date answer type question:

1. Select **Click here to add new content**.
2. Select **Question: Date Answer** from the **Type** dropdown.
3. If necessary, indent the question.
4. If necessary, number the questions by selecting the appropriate checkboxes to the right of the screen.
5. If necessary, select the **Mandatory** box to the right of the screen.
6. Enter the question text and format accordingly using the formatting options.
7. If necessary, assign a score to the answer by entering in the score field.

8. If necessary, attach a file for suppliers to view.
9. Suppliers can attach files as part of their response to this question, but you can restrict them to a particular type of file by selecting the appropriate option from the dropdown. You can restrict the size of an attachment by selecting the file size from the options provided, or you can disable the attachment option.
10. Click the **Save** button or **Cancel** button.

To create a matrix:

You can use the matrix type question to display information, as well as collate responses in a tabular format. The table is created with a user-defined matrix of cells that can have assigned attributes:

- **Hidden**: Only visible to buyer's side
- **Read Only**: Visible to suppliers
- **Answerable**: Suppliers can enter a response

The cell formats available:

- Blank
- Decimal
- Text (Alpha numeric)
- Whole Number (Integer number format)

To create a matrix:

1. Select **Click here to add new content**.
2. Select **Question: Matrix** from the **Type** dropdown.
3. If necessary, indent the question.
4. If necessary, number the questions by selecting the appropriate checkboxes to the right of the screen.
5. Enter the **Matrix Name**, and use the format icon on the far right of the screen, if necessary.
6. Click **Add Row** or **Add Column**. Repeat row and column additions until the required matrix is created.
7. To set cell attributes, check the boxes you wish to set or click **Select All**.
8. Click **Apply Selected**. Repeat until all cells are assigned the required attributes.

Note: The **Invert Selected** button will toggle the cell check boxes between checked and un-checked.

9. Click the **Save** button or **Cancel** button.

Row and Column Selection:

To easily change the cell types within a matrix question, select rows or columns and apply the data type/visibility change to the entire row or column rather than individual cells. This allows users to quickly create large, complex matrix questions.

Users can also select the entire row or column and un-check relevant cells that do not require the cell type/change to be applied, again speeding up the process.

To upload matrix content:

This feature allows you to create matrix questions from an Excel template. You can populate large matrices via an Excel spreadsheet upload, speeding up the creation of large data sets.

1. Create Matrix header and click the **Upload Content** button on the saved matrix.
2. Download the Excel template which automatically generates from the saved matrix.
3. Import content into the **Upload Template** spreadsheet and **Save**.
4. Browse and locate the saved spreadsheet on your local drive.
5. Click the **Import Content** button to upload the matrix.

To create a question tag:

1. Select **Click here to add new content**.
2. Select **Question: Tags** from the **Type** dropdown.
3. If necessary, indent the question.
4. If necessary, number the questions by selecting the appropriate checkboxes to the right of the screen.
5. If necessary, select the **Mandatory** box to the right of the screen.
6. Enter the tag name and format accordingly.
7. If necessary, assign a score to the answer by entering in the score field.
8. Click the **Save** button or **Cancel** button.

Note: This question type makes use of the tags taxonomy structure that are client specific and client managed. This allows the supplier to self-select tags that apply to them. This can be category or categories of products and services, country of origin, geographical coverage.

This question type is intended to be used primarily in the **Supplier Registration Form**, but is also enabled for sourcing type events. This information can also be stored against the supplier profile in the Admin Center. This option is available on request.

To add a URL:

1. Select **Click here to add new content**.
2. Select **URL** from the **Type** dropdown.
3. You can number the URL, or reset from 1, by checking the appropriate checkboxes.
4. Enter the URL name in the first box as you wish it to display on the page.
5. Specify the actual URL address in the second box.
6. Click the **Save** button or **Cancel** button.

To insert a table:

1. Select **Click here to add new content**.
2. Select **Table** from the **Type** dropdown.
3. Enter the **Table Title** field.
4. Enter the column header names, and click the **Add Column** button to add more columns.
5. Enter the appropriate data into the boxes according to the column header specified in the previous step. Click the **+** icon to add another row.
6. If necessary, move the rows by clicking the up or down arrow icons, or delete a row of data by clicking the **x** icon.
7. Click the **Save** button or **Cancel** button.

Note: A default table contains two columns and a single row, not including the column titles, however, you can add columns and rows as needed.

To add a page break:

1. Select **Click here to add new content**.
2. Select **Page Break** from the **Type** dropdown.
3. Click the **Save** button to confirm the page break, or **Cancel** to cancel the creation of the page break.

Note: You can insert page breaks within a questionnaire document. The combination of **Title** and **Page Break** content types allows for the creation of a cover page when a document gets converted to the PDF file format.

To insert a page start:

1. Select **Click here to add new content**.
2. Select **Page Start** from the **Type** dropdown.
3. Enter the **Tab Name** which effectively names the questionnaire page start.
4. Click the **Save** button to confirm the page start, or **Cancel** to cancel this action.

Note: When using pages, it is expected the first page is a cover page and should have a 0 page number.

To create a section:

1. Select **Click here to add new content**.
2. Select **Section** from the **Type** dropdown.
3. Enter the **Section Name** field.
4. Each section can have a weighting assigned, but is optional. If weighting is used, enter the percentage of the overall evaluation criteria the section amounts to in the **Weighting** box.
5. Click the **Save** button to save, or **Cancel** to cancel this action.

Note: The purpose of using this option is to organize questions into sections with the option of assigning weighting. This not only facilitates the ease of use for both internal users and suppliers, but also incorporates evaluation criteria.

To add a product list for a supplier's price response:

1. Select **Click here to add new content**.
2. Select **Product List** from the **Type** dropdown.
3. If necessary, indent the question.
4. If necessary, number the questions by selecting the appropriate checkboxes to the right of the screen.
5. Enter the **Product List Name**, and format accordingly.

   Note: In this instance, the list is not created from the question type. Instead, it enables the lines, groups, or lots already added to the **Lines** tab to be displayed to suppliers.
6. You can assign a score to the whole product list by entering the **Score** field.
7. If necessary, attach a file for suppliers to view.

8. Suppliers can attach files as part of their response to this question, but you can restrict them to a particular type of file by selecting the appropriate option from the dropdown. You can restrict the size of an attachment by selecting the file size from the options provided, or you can disable the attachment option.
9. Click the **Save** button or **Cancel** button.

Note: A product list displays all standalone lines created in the **Lines** tab. A manual score can be assigned to a product list type question.

To add a product list by columns for a supplier's price response:

1. Select **Click here to add new content**.
2. Select **Product List** from the **Type** dropdown.
3. If necessary, indent the question.
4. If necessary, number the questions by selecting the appropriate checkboxes to the right of the screen.
5. Enter the **Product List Name**, and format accordingly.
6. If necessary, assign a score to the whole product list by entering the **Score** field.
7. If necessary, build a custom list from this collection of column names by selecting the column name and clicking the **Add** button.
8. The result of the above two steps is to create a list of column names in the right-hand side box. These columns display from left to right in the Lines grid. To change the sequence of the left-to-right display, select the column name you want to move, and click either the **Left** or **Right** button.
9. If necessary, attach a file for suppliers to view.
10. Suppliers can attach files as part of their response to this question, but you can restrict them to a particular type of file by selecting the appropriate option from the dropdown. You can restrict the size of an attachment by selecting the file size from the options provided, or you can disable the attachment option.
11. Click the **Save** button or **Cancel** button.

Team Tab

The Team tab allows you to assign team members to the event, and have a specific role and permission assigned within that event.

To Edit a Team Member's role:

1. Click the **Edit** button next to the team member you want to edit.
2. Select the **Responsibility** and **Scoring** option from the dropdown.
3. Click the **Update** button.
4. To remove the team member from having access to, or visibility of the negotiation, click the **Remove** button.

To add a Team member:

1. Select **Add Team Member**.
2. Select team member from the **Name** dropdown.
3. Select the **Responsibility** you want that team member to have for the particular event.

Note: The role selected defines the user's permissions for the specific negotiation, and Folder or Project.

4. Click the **Add** button.

Journal Tab

The journal provides an audit trail of all significant activity within the event, from its creation to its completion. The journal records both buyer and supplier activities, facilitating sourcing process transparency. The system captures activities, responsible participant's names, and provides date and time stamps of their activities.

You can:

- Search the records using free text or calendar dates.
- Export the journal by clicking the **Export Journal** button.