

QUICK REFERENCE GUIDE (QRG): SUPPLIER RFx

Purpose: For suppliers on how to respond to RFx sourcing events

Technical Support: If you encounter any technical issues while accessing or submitting the RFx, contact ivaluasrcprjsupport@ccf.org

Video Guides: How to videos are available at the following link

<https://my.clevelandclinic.org/departments/supply-chain#supplier-resources-tab>

1. Utilize this link <https://ccf.ivalua.com/page.aspx/en/usr/login> to log into the Ivalua Supplier Portal.
2. Enter your **LOGIN** and **PASSWORD** and select Login.

Welcome to the Procurement portal

Welcome to the Group Purchasing Portal.

As part of optimizing purchasing processes and supply chain management, our group offers a dedicated tool for collaborative management of your purchases.

As the main tool for exchange between buyer and suppliers, the portal gives you the ability to access the life cycle of e-procurement, from the consultation phase (RFx) through the management of orders and deliveries, to the payment of invoices. It also allows suppliers to update their profile, catalogs and respond online to requests for proposal.

With this portal you will save time, have greater visibility and increase efficiency for the whole organization.

The Purchasing Department

IDENTIFICATION

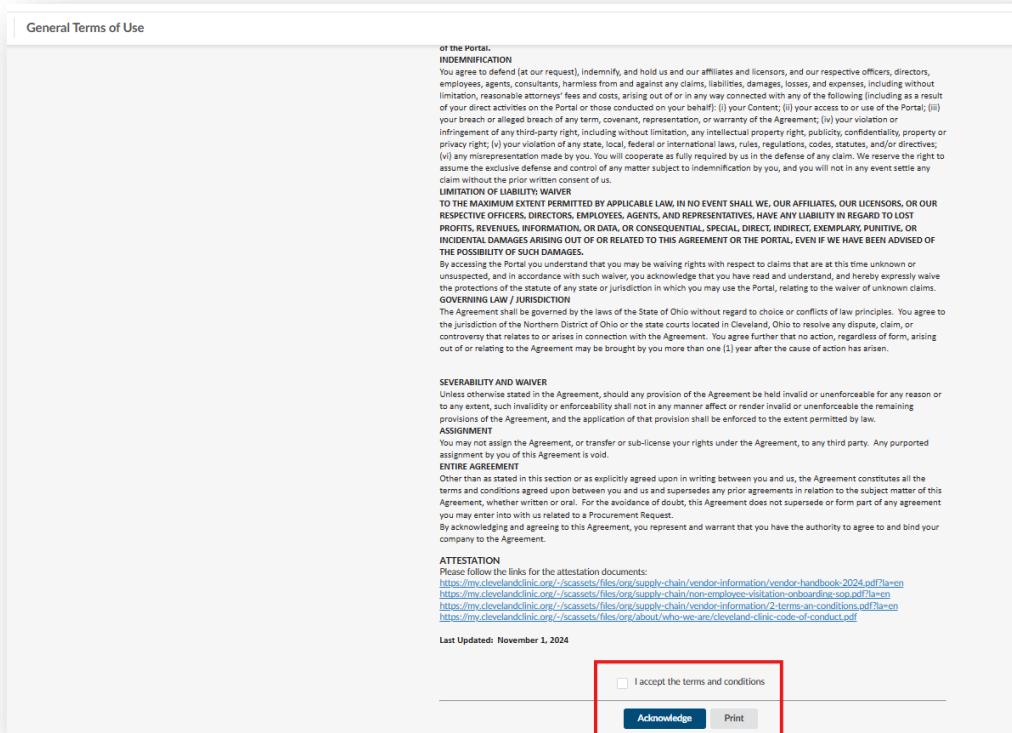
Login*

Password*

[Lost your password?](#)

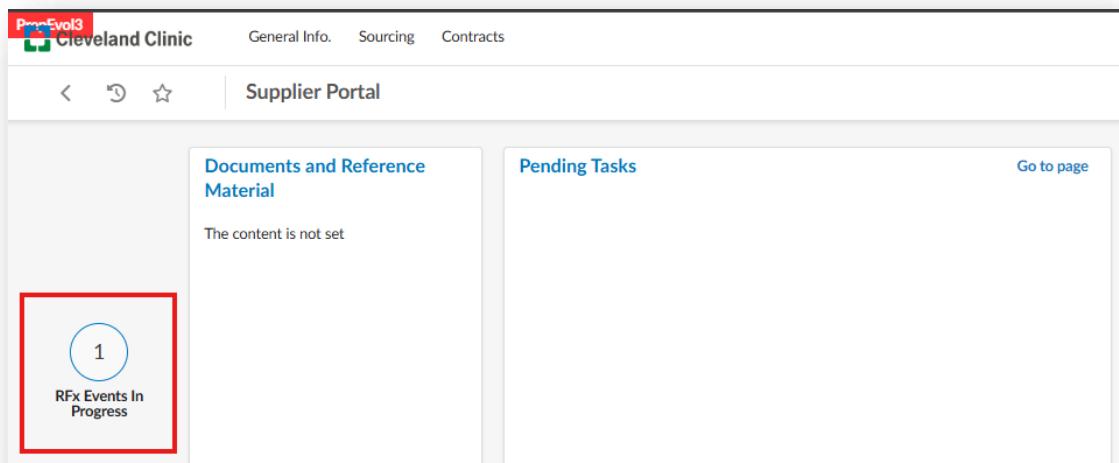
[New Supplier? Register Now](#)

3. If this is your first time logging into the Ivalua supplier portal, you will be directed to the General Term of Use. Review the General Term of Use and each attestation link. **ACCEPT** the terms and conditions and select **ACKNOWLEDGE**.

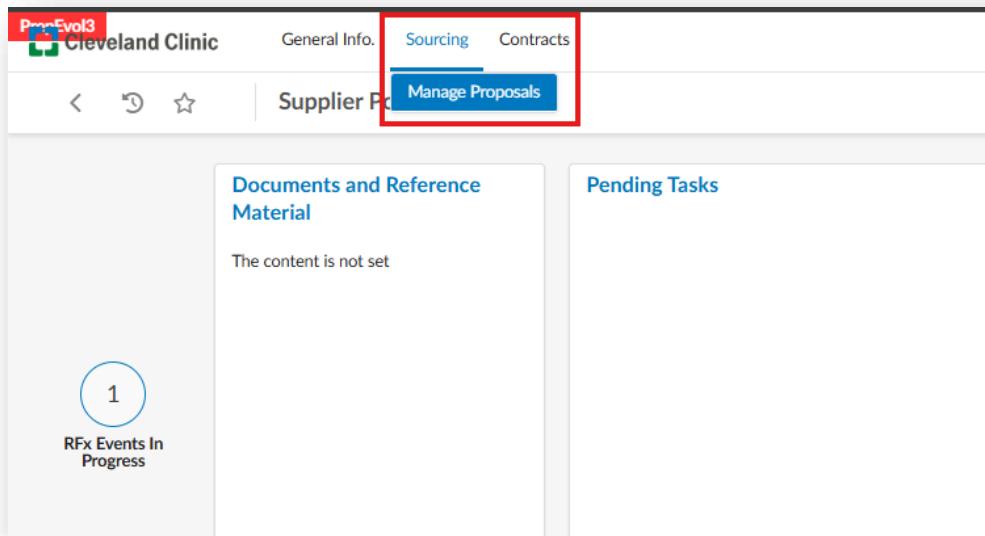


4. You will be directed to the supplier portal home page. Navigate to the sourcing event by:

- Option 1: Select the **RFX EVENTS IN PROGRESS** icon on the left-hand side of the screen.



- Option 2: Hover over Sourcing and select **MANAGE PROPOSALS**.



5. You will be taken to Manage Proposals, showing all the rounds linked to the proposal.

Important: Not all proposals will have the same number of rounds associated with it and new rounds may be sent out throughout the project.

Progress	Sourcing Project	Lot #	Round #	RFx Name	RFx Status	Remaining Time	Open Date (UTC-4)	Close Date (UTC-4)	My Bid
● ○ ○ Awaiting Acknowledgment	BPM000575	1	2	Response to Participate and Statement of Understanding	Open for Bidding	3d 16h 01min 00s	5/8/2025 12:00:00 AM	5/12/2025 12:00:00 AM	0.00 USD
● ○ ○ New Proposal	BPM000575	1	1	Distribution of RFP	Open for Bidding	22d 23h 58min 52s	5/8/2025 12:00:00 AM	5/31/2025 7:57:52 AM	0.00 USD
2 Record(s)									

a. Grid Details:

- Lot and Round #: The lot and round # associate to the proposal.
- RFx Name: Name of the RFx.
- RFx Status: Status of the RFx.
- Remaining time: The remaining time until the round will be closed, and a response can no longer be submitted.
- Open Date: Date on which the round was opened or will open.

- vi. Close Date: Date at which the round will close.
- vii. My Bid, My Rank and Best Bid is only utilized during an eAuction and does not pertain to an RFx.

6. Select the **PENCIL ICON** to open the round in which you want to view.

Progress	Sourcing Project	Lot #	Round #	RFx Name	RFx Status	Remaining Time	Open Date (UTC-4)	Close Date (UTC-4)	My Bid
Awaiting Acknowledgment	BPM000575	1	2	Response to Participate and Statement of Understanding	Open for Bidding	3d 16h 01min 00s	5/8/2025 12:00:00 AM	5/12/2025 12:00:00 AM	0.00 USD
New Proposal	BPM000575	1	1	Distribution of RFP	Open for Bidding	22d 23h 58min 52s	5/8/2025 12:00:00 AM	5/31/2025 7:57:52 AM	0.00 USD

7. You will automatically be directed to the round. The sections included in the round are displayed on the left-hand side. Select the **>> ICON** to view the description of the section.

Round Sections:

8. View RFx: This section provides the general information of the sourcing event, timeline, and any associated documents.

- RECEIPT OF ACKNOWLEDGEMENT:** Some rounds require receipt of acknowledgement which will be provided in this section as shown in the example above.
- INTENT TO BID:** Some rounds require your intent to bid which will be provided in this section upon acknowledging the receipt of the RFx.

9. Your Bid Info & Docs: Enter the general information for your response to the round. Update the **LABEL**, add a **DESCRIPTION**, and attach any **DOCUMENTS** in which you want to be included in the response. For examples of documents which would be uploaded in this section please refer to the Proposal Content and Format section of the RFx document. Upon entering the information select **SAVE** at the top of the screen.

Distribution of RFP (BPM000575) - Lot : 1 / Round : 1

Remaining time : 22d 22h 49min 10s - No proposal has been submitted

General Information

Label*
Proposal # 1

Description

Supplier Documents

Click or Drag to add files

Save Download All Submit Proposal Cancel Proposal

10. Bidding Team: Invite your colleagues and give them access to this RFx via the Bidding Team tab.

- Select an existing contact by selecting the drop down under **SELECT CONTACT** and selecting the contact.

Contact CONTACT New has been added to this process.

Remaining time : 22d 22h 24min 36s - No proposal has been submitted

Unable to answer some questions of this RFx?
Get help from your colleagues!

Invite your colleagues and give them access to this RFx.
You can choose from the contacts already identified on this portal, or easily create a new contact to invite a colleague.

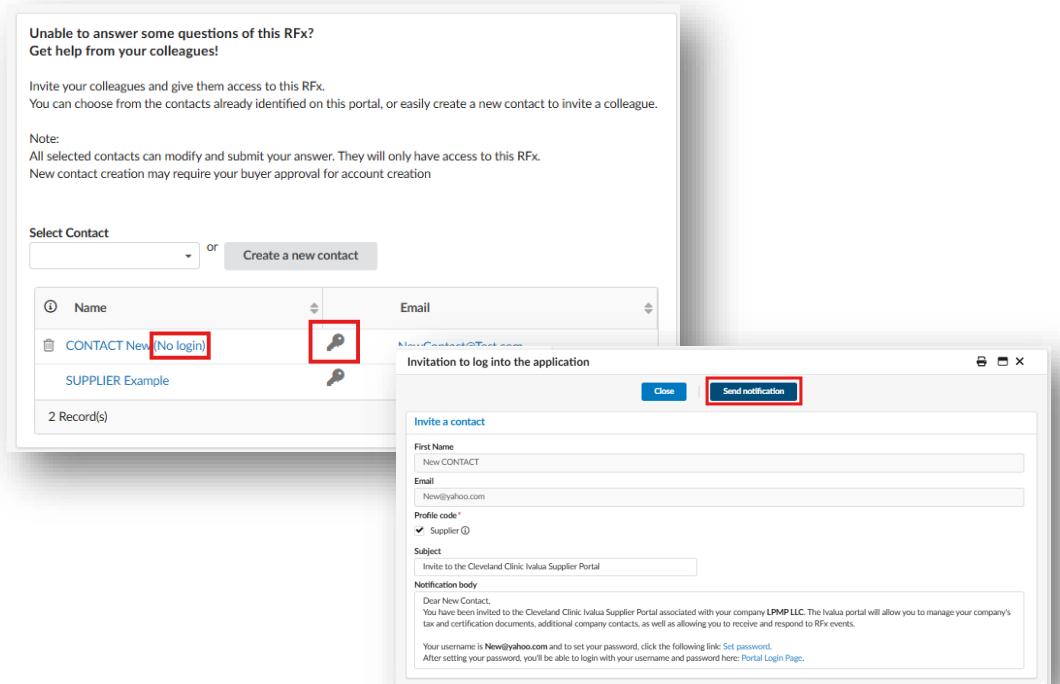
Note:
All selected contacts can modify and submit your answer. They will only have access to this RFx.
New contact creation may require your buyer approval for account creation

Select Contact or Create a new contact

Name	Email
CONTACT New (No login)	NewContact@Test.com
SUPPLIER Example	Examplesupplier@test.com

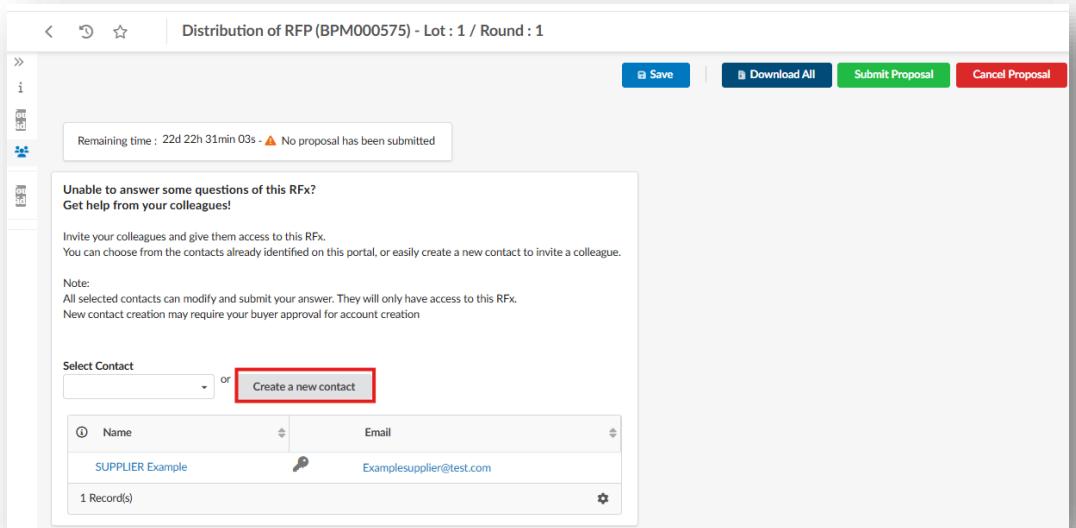
2 Record(s)

- Ensure the contact has an account – if **(NO LOGIN)** is present next the contacts name, which means they do not have an account. To add an account, select the **KEY ICON** next to the contact and select **SEND NOTIFICATION**. The contact will receive an email to login and set their password.



b. Add a new contact:

i. Select **CREATE A NEW CONTACT**.



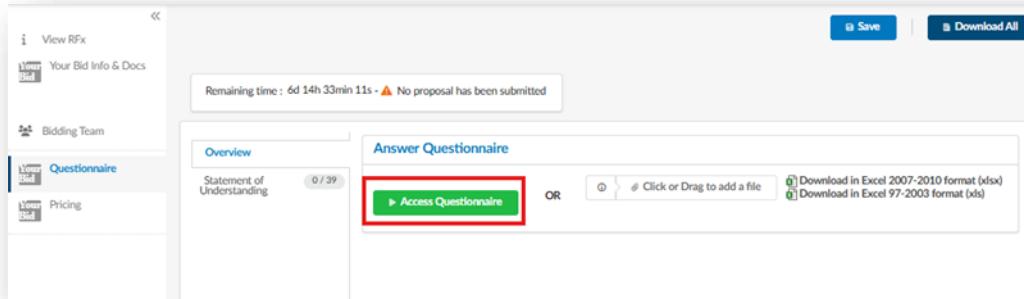
ii. Complete the Required fields and select **SAVE & CLOSE**.

1. FIRST AND LAST NAME.
2. EMAIL.
3. PHONE.

iii. To create an account so they can log into the Supplier Portal and view/respond to the RFx select the **KEY ICON** and select **SEND NOTIFICATION**. The contact will receive an email to login and set their password.

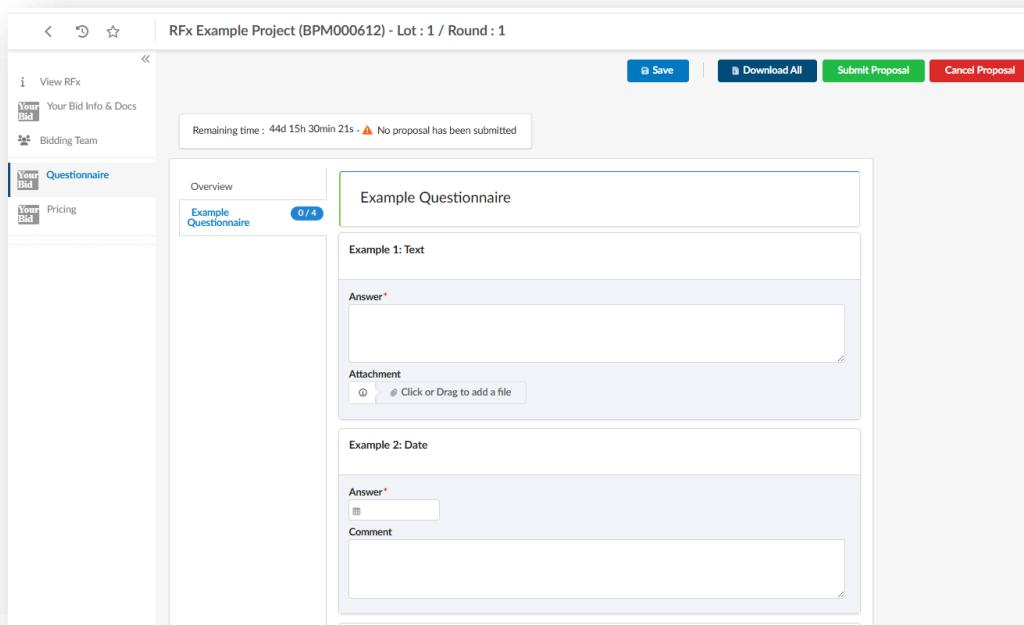
11. Questionnaire: Navigate to the questionnaire tab to complete any questionnaires associated with the round.

a. Select **ACCESS QUESTIONNAIRE**.



b. Answer the questions and select **SAVE** at the top of the screen.

Note: Questions with a red asterisk are required.



12. Pricing: Navigate to the **PRICING** tab to complete any item grids associated to the round.

Important: Some rounds may have multiple grids which will be separated by the grid tabs.

The screenshot shows the RFx Example Project (BPM000612) interface. The top navigation bar includes 'View RFx', 'Your Bid Info & Docs', 'Bidding Team', 'Questionnaire', 'Your Bid', and 'Pricing' (which is highlighted with a red box). The main content area displays a message 'Remaining time : 44d 15h 29min 29s - No proposal has been submitted'. Below this are download options for quotation forms in Excel 2007-2010 (xlsx) and Excel 97-2003 (xls), and a file upload area. A 'Currency' dropdown is set to 'USD'. A 'Keyword Search' bar is present. The main grid is titled 'ITD/Software Example' and contains rows for 'Goods Product Example #1' and 'Goods Product Example #2'. The grid columns include Order, Code, Label, Type, Section*, Supplier Description*, Perpetual/Subscription*, and Product Code. The 'Section*' column is highlighted with a red box.

a. You can complete the grids by entering information directly into the grid lines or by utilizing an Excel export/ import.

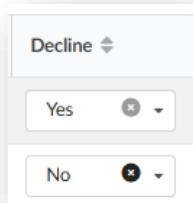
i. Completing grid by entering information directly into the grid lines.

1. Enter the required information and select **SAVE**. Fields with a red asterisk * are required.

Note: Not all grids will have the same fields to complete.

The screenshot shows the same RFx Example Project interface as the previous one, but with a red box highlighting the 'Section*', 'Supplier Description*', 'Perpetual/Subscription*', and 'Product Code' columns in the grid. The 'Section*' column is marked with a red asterisk (*). The grid also shows 5 Record(s).

2. To decline responding to an item navigate to the **DECLINE** column and update to **YES**.



3. If the round allows you to add additional lines and you wish to add more lines, select the **ICON** in the grid header.

a. Complete the required fields and select **SAVE**.

- i. **TYPE:** This will auto populate; no update is required.
- ii. **CODE:** This will auto populate; no update is required.
- iii. **LABEL:** The label will vary depending on the RFx. If the RFx is for goods enter the item description, if the RFx is for services enter the service type i.e. Landscaping Service, if the RFx is for ITD/Software enter ITD/Software.

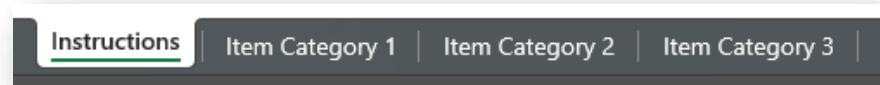
Note: Type, Code and Label are required on all grids. Additional fields are required based on the grid associated with the RFx.

ii. Completing grid by utilizing an **EXCEL EXPORT/ IMPORT.**

1. Select the excel format in which you want to download.

2. The excel will include the **INSTRUCTIONS** sheet and a sheet for each grid.

Important: Some RFx's may have multiple grids so the excel will have one sheet for each grid.



3. Navigate to the grid sheet and complete each grid – Enter the information required.

- Columns in white are for the supplier to complete and are optional.
- Columns in red are for the supplier to complete and are required.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Parent Item	Order	Code	Label	Field type	Qty	Unit	Unit price	Amount			
2			I1_1	Software/ Service Fees	Required Item							
3			I1_2	Hardware Fees	Required Item							
4			I1_3	Integration Fees	Required Item							
5			I1_4	Implementation Fees	Required Item							
6			I1_5	Support Fees	Required Item							
7												
8												
9												

4. If the round allows you to add additional items, you can do so by completing the below steps.

- Enter the **CODE**, **LABEL** and **FIELD TYPE** as they are required for every line to be added.
 - Code: Follow the current sequence for the code i.e. If the last item on the grid is I1_8 the next line would be I1_9.
 - Label: this field does not have to be unique, and you can utilize the same label on multiple lines.
 - Field type should always be Optional Item.

A	B	C	D	E	F	G	H	I	J
Parent Item	Order	Code	Label	Field type	Qty	Unit	Unit price	Amount	Decline
		I1_1	Item A1	Optional Item					
		I1_2	Item A2	Optional Item					
		I1_3	Item A3	Optional Item					
		I1_4	Item A4	Optional Item					
		I1_5	Item A5	Optional Item					
		I1_6	Item A6	Optional Item					
		I1_7	Item A7	Optional Item					
		I1_8	Item A8	Optional Item					
0		I1_9							
1		I1_10							
2		I1_11							
3		I1_12							
4		I1_13							

b. Complete the remainder of supplier fields (white and red columns).

5. Import the grid.

a. ADD YOUR DOCUMENT.

Drop here your quotation form (in Excel format)

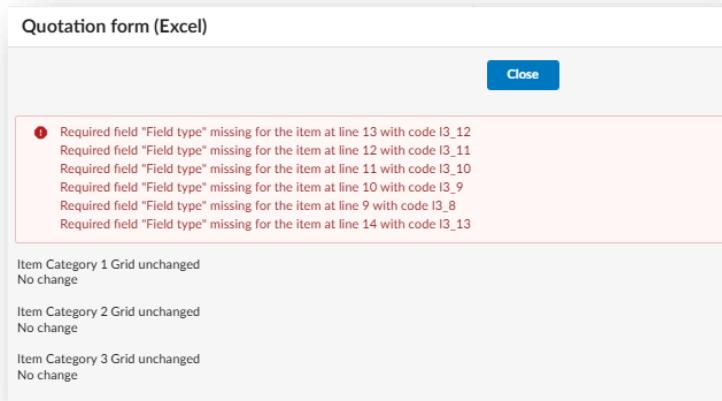
Download in Excel 2007-2010 format (xlsx) Download in Excel 97-2003 format (xls)

Currency *

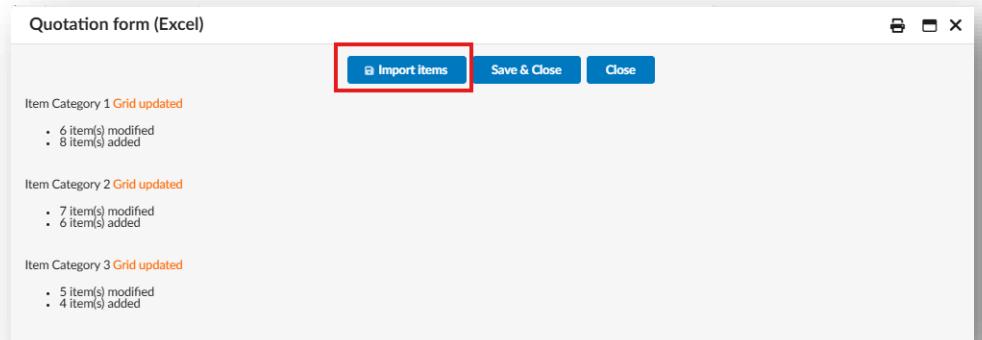
USD

Keyword Search Show unanswered items only

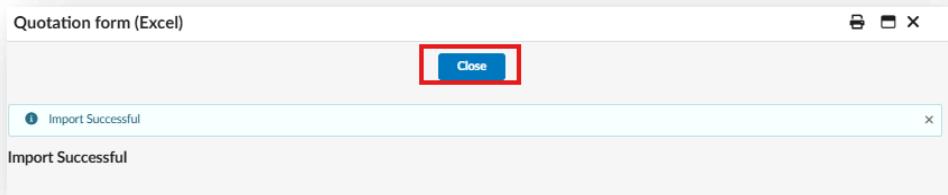
b. If you are missing required fields, you will receive an alert with the fields which are missing. Complete those fields and re-upload the grid.



c. If the grid is completed with no missing fields, you will be provided with the screen below. This will provide how many lines you have modified and added if you added any. Select **IMPORT ITEMS**.



d. Select **CLOSE**.



e. The fields will populate on the grid from the import.

Item Category 1		Item Category 2	Item Category 3							
0		Selected								
		Order ▲	Code ▲	Label ▲	Type ▲	Qty ▲	Unit ▲	Unit price ▲	Amount ▲	Decline ▲
			I1_1	Item A1	Optional Item		20.00	20.00	No	✖
			I1_2	Item A2	Optional Item		15.00	15.00	No	✖
			I1_3	Item A3	Optional Item				No	✖
			I1_4	Item A4	Optional Item		20.00	20.00	No	✖
			I1_5	Item A5	Optional Item		30.00	30.00	No	✖
			I1_6	Item A6	Optional Item		15.00	15.00	No	✖
			I1_7	Item A7	Optional Item		30.00	30.00	No	✖
			I1_8	Item A8	Optional Item				No	✖
			I1_10	Additional Item 2	Optional Item			15.00	15.00	
			I1_11	Additional Item 3	Optional Item			20.00	20.00	
			I1_12	Additional Item 4	Optional Item			35.00	35.00	
			I1_13	Additional Item 5	Optional Item			51.00	51.00	
			I1_14	Additional Item 6	Optional Item			85.00	85.00	
			I1_15	Additional Item 7	Optional Item			36.00	36.00	
			I1_16	Additional Item 8	Optional Item			12.00	12.00	
1	2	>	16 Record(s)							⚙

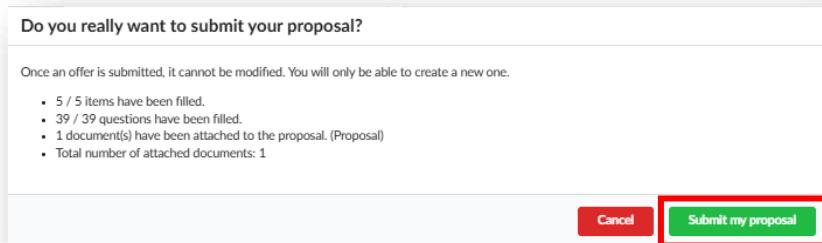
13. Submit Proposal:

- When you are ready to submit your proposal select **SUBMIT PROPOSAL** at the top of the screen.

The screenshot shows the 'Example Sourcing RFx (BPM000425) - Lot : 1 / Round : 1' window. The 'Pricing' tab is selected. At the top right, there are buttons for 'Save', 'Download All', 'Submit Proposal' (which is highlighted with a red box), and 'Cancel Proposal'. Below these are download options for Excel 2007-2010 and 97-2003 formats. The main area shows a 'Pricing Grid' with 5 records, each with a code, description, type, quantity, unit price, and amount. The total amount is listed as USD 205,000.00.

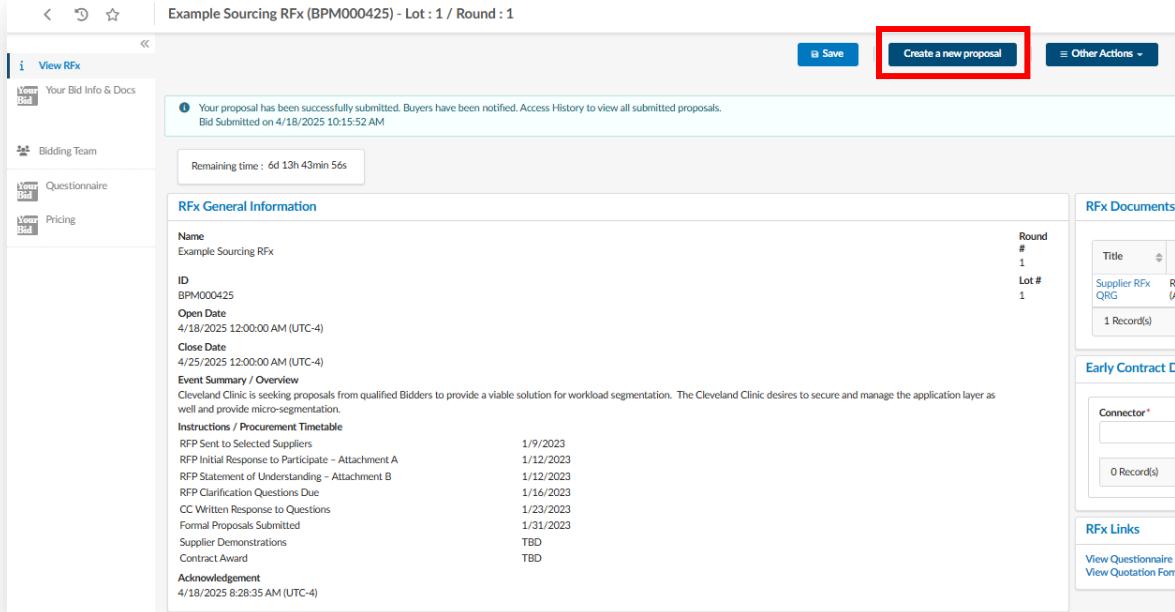
- Select **SUBMIT MY PROPOSAL** in the pop up.

Note: This proposal will be closed, and you can no longer edit it.



14. If a proposal was already submitted and a change is required, you must create a new proposal. Follow the steps below:

- Select **CREATE A NEW PROPOSAL** at the top of the screen. Navigate to **OTHER ACTIONS** and select **COPY AN EXISTING PROPOSAL** or **COPY LAST SUBMITTED PROPOSAL**.



Example Sourcing RFx (BPM000425) - Lot : 1 / Round : 1

Your Bid Info & Docs

Create a new proposal (highlighted with a red box)

Your Bid Info & Docs

Your Bid

Bidding Team

Questionnaire

Pricing

RFx General Information

Name: Example Sourcing RFx

ID: BPM000425

Open Date: 4/18/2025 12:00:00 AM (UTC-4)

Close Date: 4/25/2025 12:00:00 AM (UTC-4)

Event Summary / Overview: Cleveland Clinic is seeking proposals from qualified Bidders to provide a viable solution for workload segmentation. The Cleveland Clinic desires to secure and manage the application layer as well and provide micro-segmentation.

Instructions / Procurement Timetable

RFP Sent to Selected Suppliers	1/9/2023
RFP Initial Response to Participate - Attachment A	1/12/2023
RFP Statement of Understanding - Attachment B	1/12/2023
RFP Clarification Questions Due	1/16/2023
CC Written Response to Questions	1/23/2023
Formal Proposals Submitted	1/31/2023
Supplier Demonstrations	TBD
Contract Award	TBD

Acknowledgement: 4/18/2025 8:28:35 AM (UTC-4)

Remaining time : 6d 13h 43min 56s

Save

Other Actions

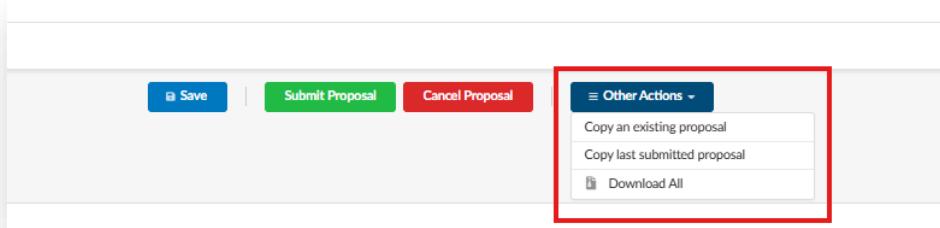
RFx Documents

Connector

RFx Links

View Questionnaire

View Quotation Form



Save | Submit Proposal | Cancel Proposal

Other Actions

Copy an existing proposal

Copy last submitted proposal

Download All

b. Under your Bid Info & Docs select **ANSWER TYPE**, if this is replacing an existing proposal select the proposal in which it's replacing.

Test project 5.29 JL #1 (BPM000429) - Lot : 1 / Round : 1

Remaining time : 1d 02h 51min 21s - ⚠ Current proposal has not been submitted

Your Bid Info & Docs

Bidding Team

Questionnaire

Pricing

Acknowledgement
Submission acknowledged on 5/29/2025 at 10:39 AM

General Information

Label*
Copy of Proposal # 1

Answer type

Alternate proposal
 Replace existing proposal

Replaced proposal*
Proposal # 1

Description

Supplier Documents
Click or Drag to add files

Save | Submit Proposal | Cancel Proposal | Other Actions

c. Make the appropriate changes/additions and select **SUBMIT PROPOSAL**.

15. Upon rounds being closed you will have to clear the filter on **MANAGE PROPOSAL** screen as the **RFX STATUS** will update to closed.

Manage Proposals

Keyword Search Proposal Progress RFx Status

Progress	Sourcing Project	Lot #	Round #	RFx Name	RFx Status	Remaining Time	Open Date (UTC-4)	Close Date (UTC-4)	My Bid
● Submitted Proposal	BPM000575	1	2	Response to Participate and Statement of Understanding ⓘ	Closed	Bid due date has passed	5/8/2025 12:00:00 AM	5/8/2025 12:35:40 PM	0.00 USD
● Submitted Proposal	BPM000575	1	1	Distribution of RFP ⓘ	Closed	Bid due date has passed	5/8/2025 12:00:00 AM	5/8/2025 12:35:50 PM	0.00 USD

2 Record(s)