

QUICK REFERENCE GUIDE (QRG): SUPPLIER RFx

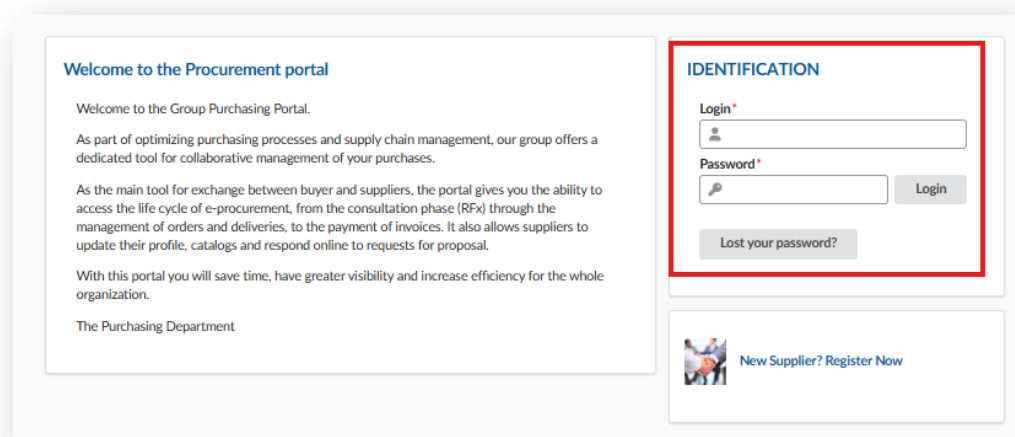
Purpose: For suppliers on how to respond to RFx sourcing events

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*

Login

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**.

General Terms of Use

OF THE PORTAL.

INDEMNIFICATION
You agree to defend (at our request), indemnify, and hold us and our affiliates and licensors, and our respective officers, directors, employees, agents, consultants, harmless from and against any claims, liabilities, damages, losses, and expenses, including without limitation, reasonable attorneys' fees and costs, arising out of or in any way connected with any of the following (including as a result of your direct activities on the Portal or those conducted on your behalf): (i) your Content; (ii) your access to or use of the Portal; (iii) your breach or alleged breach of any term, covenant, representation, or warranty of the Agreement; (iv) your violation or infringement of any third-party right, including without limitation, any intellectual property right, publicity, confidentiality, property or privacy right; (v) your violation of any state, local, federal or international laws, rules, regulations, codes, statutes, and/or directives; (vi) any misrepresentation made by you. You will cooperate as fully required by us in the defense of any claim. We reserve the right to assume the exclusive defense and control of any matter subject to indemnification by you, and you will not in any event settle any claim without the prior written consent of us.

LIMITATION OF LIABILITY WAIVER
TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL WE, OUR AFFILIATES, OUR LICENSORS, OR OUR RESPECTIVE OFFICERS, DIRECTORS, EMPLOYEES, AGENTS, AND REPRESENTATIVES, HAVE ANY LIABILITY IN REGARD TO LOST PROFITS, REVENUES, INFORMATION, OR DATA, OR CONSEQUENTIAL, SPECIAL, DIRECT, INDIRECT, EXEMPLARY, PUNITIVE, OR INCIDENTAL DAMAGES ARISING OUT OF OR RELATED TO THIS AGREEMENT OR THE PORTAL, EVEN IF WE HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

By accessing the Portal you understand that you may be waiving rights with respect to claims that are at this time unknown or unsuspected, and in accordance with such waiver, you acknowledge that you have read and understand, and hereby expressly waive the protections of the statute of any state or jurisdiction in which you may use the Portal, relating to the waiver of unknown claims.

GOVERNING LAW / JURISDICTION
The Agreement shall be governed by the laws of the State of Ohio without regard to choice or conflicts of law principles. You agree to the jurisdiction of the Northern District of Ohio or the state courts located in Cleveland, Ohio to resolve any dispute, claim, or controversy that relates to or arises in connection with the Agreement. You agree further that no action, regardless of form, arising out of or relating to the Agreement may be brought by you more than one (1) year after the cause of action has arisen.

SEVERABILITY AND WAIVER
Unless otherwise stated in the Agreement, should any provision of the Agreement be held invalid or unenforceable for any reason or to any extent, such invalidity or unenforceability shall not in any manner affect or render invalid or unenforceable the remaining provisions of the Agreement, and the application of that provision shall be enforced to the extent permitted by law.

ASSIGNMENT
You may not assign the Agreement, or transfer or sub-license your rights under the Agreement, to any third party. Any purported assignment by you of this Agreement is void.

ENTIRE AGREEMENT
Other than as stated in this section or as explicitly agreed upon in writing between you and us, the Agreement constitutes all the terms and conditions agreed upon between you and us and supersedes any prior agreements in relation to the subject matter of this Agreement, whether written or oral. For the avoidance of doubt, this Agreement does not supersede or form part of any agreement you may enter into with us related to a Procurement Request.

By acknowledging and agreeing to this Agreement, you represent and warrant that you have the authority to agree to and bind your company to the Agreement.

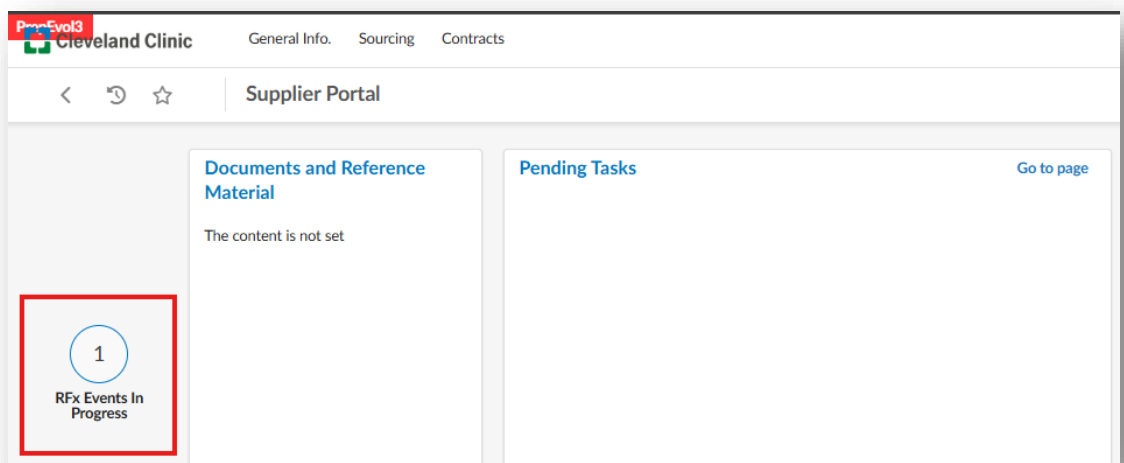
ATTESTATION
Please follow the links for the attestation documents:
<https://my.clevelandclinic.org/-/scassets/files/one/uegh-chain/vendor-information/vendor-handbook-2024.pdf?m=en>
<https://my.clevelandclinic.org/-/scassets/files/one/uegh-chain/non-employee-violation-onboarding.pdf?m=en>
<https://my.clevelandclinic.org/-/scassets/files/one/uegh-chain/vendor-information/2-terms-an-conditions.pdf?m=en>
<https://my.clevelandclinic.org/-/scassets/files/one/about/who-we-are/cleveland-clinic-code-of-conduct.pdf>

Last Updated: November 1, 2024

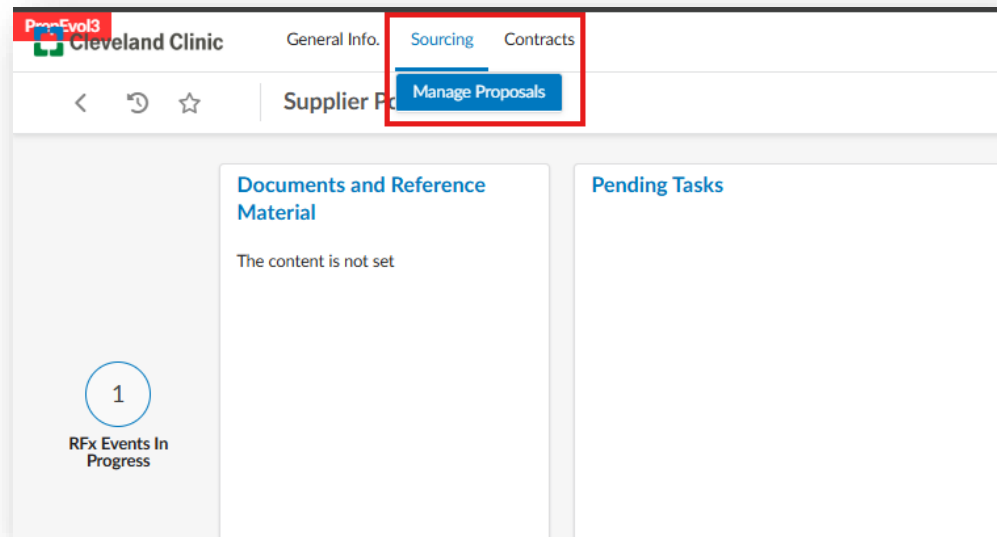
☐ I accept the terms and conditions

Acknowledge **Print**

4. You will be directed to the supplier portal home page. Navigate to the sourcing event by:
 - a. Option 1: Select the **RFX EVENTS IN PROGRESS** icon on the left-hand side of the screen.



- b. 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:

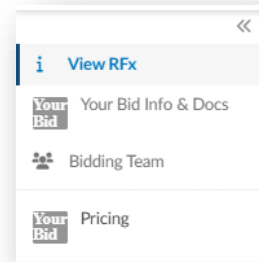
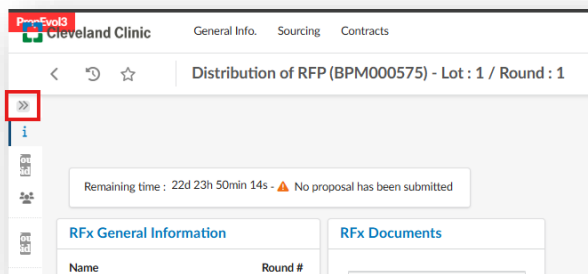
- i. Lot and Round #: The lot and round # associate to the proposal.
- ii. RFX Name: Name of the RFX.
- iii. RFX Status: Status of the RFX.
- iv. Remaining time: The remaining time until the round will be closed, and a response can no longer be submitted.
- v. Open Date: Date on which the round was opened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

2 Record(s)

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.

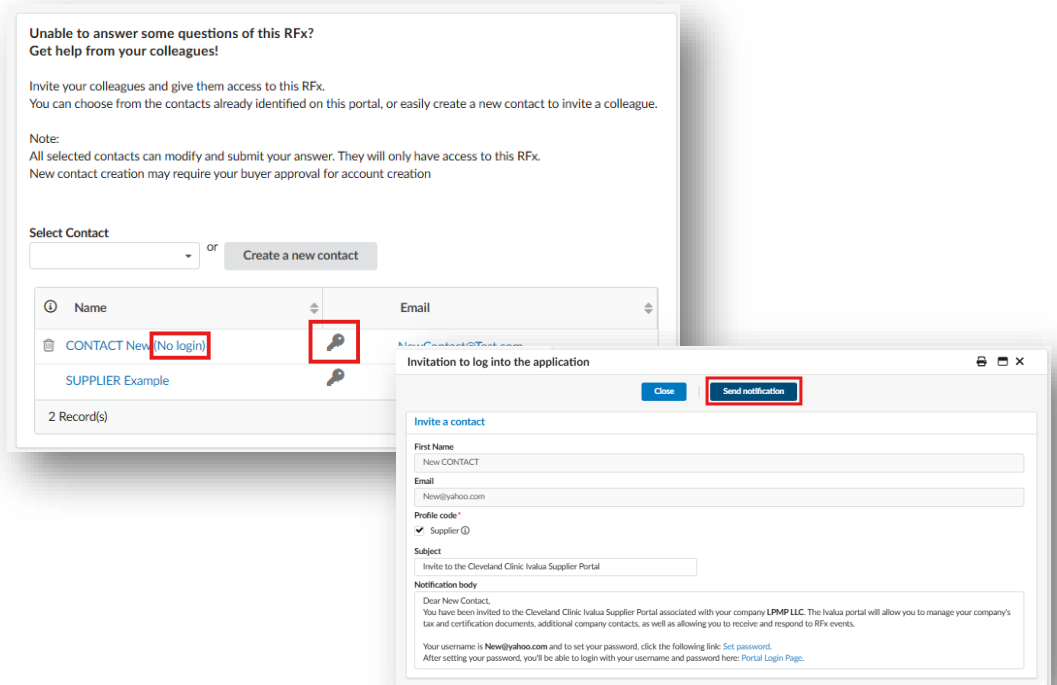
- a. **RECEIPT OF ACKNOWLEDGEMENT:** Some rounds require receipt of acknowledgement which will be provided in this section as shown in the example above.
- b. **INTENT TO BID:** Some rounds require your intent to bid which will be provided in this section upon acknowledging the receipt of the RFx.

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.

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

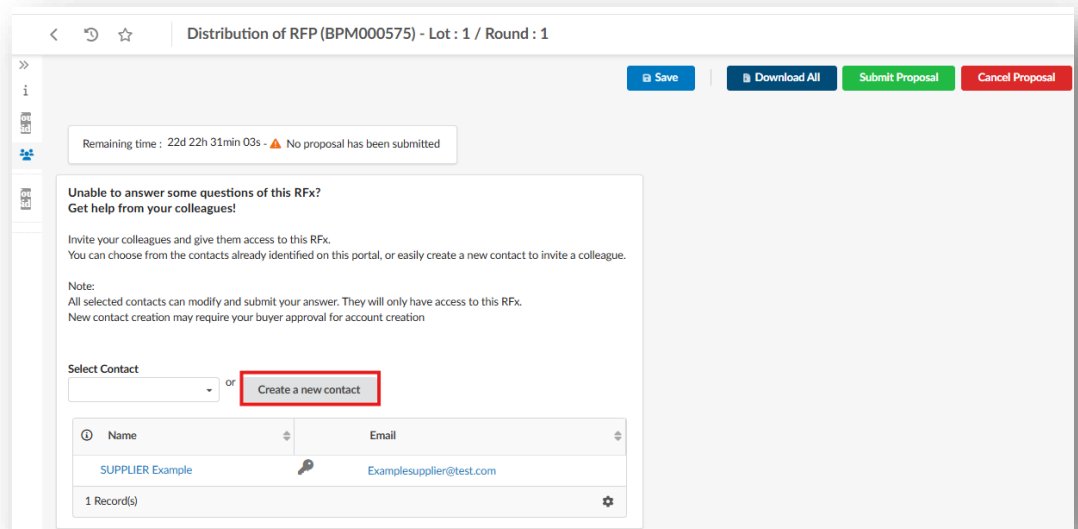
- a. Select an existing contact by selecting the drop down under **SELECT CONTACT** and selecting the contact.

- i. 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.**

Supplier Contact

Save Save & Close Close

Identity

First Name*

Last Name*

Email*

Language English

Job Title (optional)

en

Supplier LPMP LLC

Phone

Country Code Area Code Phone Ext

text_selCodeCodeCell text_telContact...

text_selCodeCodeFax text_telContact... text_telContact...

Photo

Click or Drag to add a picture

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.

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)	Key icon	NewContact@Test.com
SUPPLIER Example	Key icon	Examplesupplier@test.com

2 Record(s)

Invitation to log into the application

Close Send notification

Invite a contact

First Name New CONTACT

Email New@yahoo.com

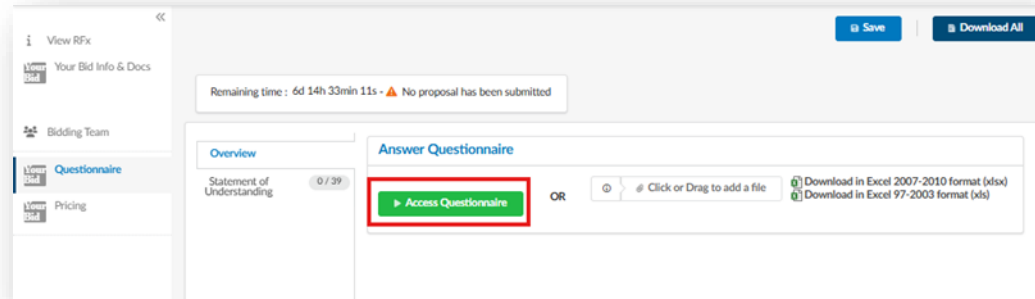
Profile code*

Supplier

Subject Invite to the Cleveland Clinic Ivalua Supplier Portal

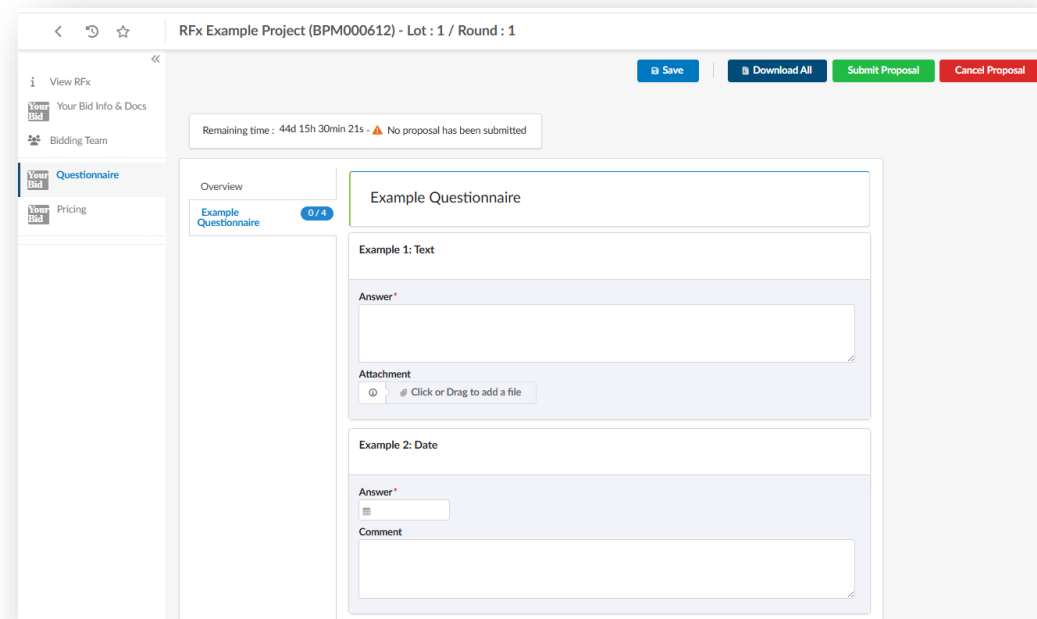
11. Questionnaire: Navigate to the questionnaire tab to complete any questionnaires associated with the round.

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.

RFx Example Project (BPM000612) - Lot : 1 / Round : 1

View RFx

Your Bid Info & Docs

Bidding Team

Questionnaire

Your Bid Pricing

Remaining time : 44d 15h 29min 29s - ⚠ No proposal has been submitted

Download in Excel 2007-2010 format (xlsx)

Download in Excel 97-2003 format (xls)

Drop here your quotation form (in Excel format)

Click or Drag to add a file

Currency* USD Total per currency

Keyword Search

Show unanswered items only Search Reset

ITD/Software Example Goods Product Example #1 Goods Product Example #2

0 Selected

Order	Code	Label	Type	Section	Supplier Description	Perpetual/Subscription	Product Code
	11_1	Software/Service Fees	Required Item				

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.

Remaining time : 44d 15h 28min 19s - ⚠ No proposal has been submitted

Download in Excel 2007-2010 format (xlsx)

Download in Excel 97-2003 format (xls)

Drop here your quotation form (in Excel format)

Click or Drag to add a file

Currency* USD Total per currency

Keyword Search

Show unanswered items only Search Reset

ITD/Software Example Goods Product Example #1 Goods Product Example #2

0 Selected

Order	Code	Label	Type	Section	Supplier Description	Perpetual/Subscription	Product Code
	11_1	Software/Service Fees	Required Item				
	11_2	Hardware Fees	Required Item				
	11_3	Integration Fees	Required Item				
	11_4	Implementation Fees	Required Item				
	11_5	Support Fees	Required Item				

5 Record(s)

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

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

- 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.

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

Save Download All Submit Proposal Cancel Proposal

Download in Excel 2007-2010 format (xlsx) Download in Excel 97-2003 format (xls) Drop here your quotation form (in Excel format) Click or Drag to add a file

Currency* USD Total per currency

Keyword Search Show unanswered items only Search Reset

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						No
I1_2	Item A2	Optional Item						No
I1_3	Item A3	Optional Item						No
I1_4	Item A4	Optional Item						No

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.

Instructions	Item Category 1	Item Category 2	Item Category 3
--------------	-----------------	-----------------	-----------------

3. Navigate to the grid sheet and complete each grid – Enter the information required.
 - a. Columns in white are for the supplier to complete and are optional.
 - b. 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.
 - a. Enter the **CODE**, **LABEL** and **FIELD TYPE** as they are required for every line to be added.
 - i. 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.
 - ii. Label: this field does not have to be unique, and you can utilize the same label on multiple lines.
 - iii. 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
2			I1_1	tem A1	Optional Item					
3			I1_2	tem A2	Optional Item					
4			I1_3	tem A3	Optional Item					
5			I1_4	tem A4	Optional Item					
6			I1_5	tem A5	Optional Item					
7			I1_6	tem A6	Optional Item					
8			I1_7	tem A7	Optional Item					
9			I1_8	tem A8	Optional Item					
10			I1_9							
11			I1_10							
12			I1_11							
13			I1_12							
14			I1_13							
15										

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

5. Import the grid.

a. **ADD YOUR DOCUMENT.**

Download in Excel 2007-2010 format (xlsx) Drop here your quotation form (in Excel format)

Download in Excel 97-2003 format (xls) Click or Drag to add a file

Currency* USD Total per currency

Keyword Search ☐ Show unanswered items only Search Reset

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.

Quotation form (Excel) Close

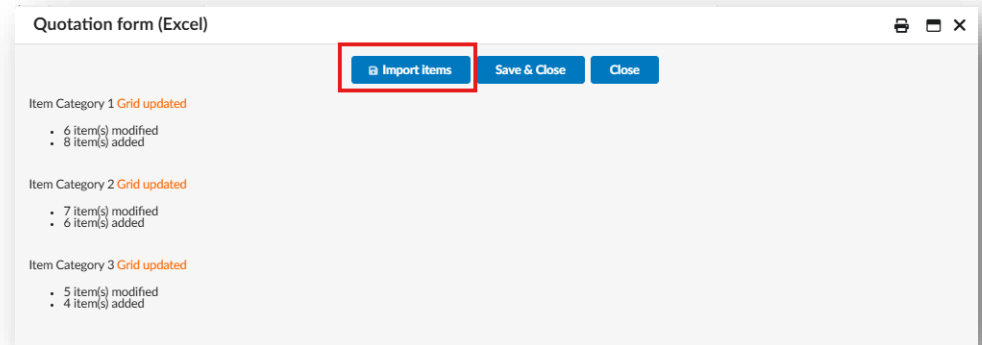
Required field "Field type" missing for the item at line 13 with code I3_12
 Required field "Field type" missing for the item at line 12 with code I3_11
 Required field "Field type" missing for the item at line 11 with code I3_10
 Required field "Field type" missing for the item at line 10 with code I3_9
 Required field "Field type" missing for the item at line 9 with code I3_8
 Required field "Field type" missing for the item at line 14 with code I3_13

Item Category 1 Grid unchanged
No change

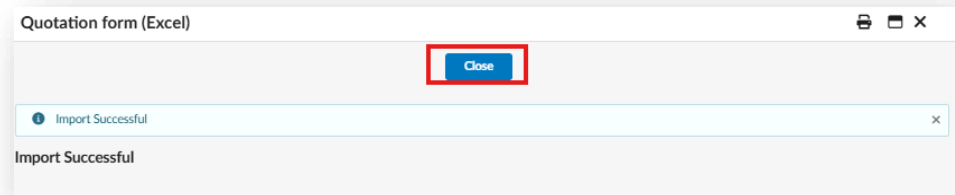
Item Category 2 Grid unchanged
No change

Item Category 3 Grid unchanged
No change

- 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	<input type="text"/>		15.00	15.00		
		I1_11	Additional item 3	Optional Item	<input type="text"/>		20.00	20.00		
		I1_12	Additional item 4	Optional Item	<input type="text"/>		35.00	35.00		
		I1_13	Additional item 5	Optional Item	<input type="text"/>		51.00	51.00		
		I1_14	Additional item 6	Optional Item	<input type="text"/>		85.00	85.00		
		I1_15	Additional item 7	Optional Item	<input type="text"/>		36.00	36.00		
		I1_16	Additional item 8	Optional Item	<input type="text"/>		12.00	12.00		
1 2 > 16 Record(s)										

13. Submit Proposal:

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

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

Save Download All **Submit Proposal** Cancel Proposal

Remaining time: 6d 13h 45min 37s - No proposal has been submitted

Download in Excel 2007-2010 format (xlsx) Download in Excel 97-2003 format (xls) Drop here your quotation form (in Excel format) Click or Drag to add a file

Currency: USD Total per currency: USD 205,000.00

Keyword Search Show unanswered items only Search Reset

Pricing Grid

Order	Code	Label	Type	Qty	Unit	Unit price	Amount
I1_1		Software/ Service Fees	Required Item			120,000.00	120,000.00
I1_2		Hardware Fees	Required Item			25,000.00	25,000.00
I1_3		Integration Fees	Required Item			15,000.00	15,000.00
I1_4		Implementation Fees	Required Item			30,000.00	30,000.00
I1_5		Support Fees	Required Item			15,000.00	15,000.00

5 Record(s)

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

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

Do you really want to submit your proposal?

Once an offer is submitted, it cannot be modified. You will only be able to create a new one.

- 5 / 5 items have been filled.
- 39 / 39 questions have been filled.
- 1 document(s) have been attached to the proposal. (Proposal)
- Total number of attached documents: 1

Cancel **Submit my proposal**

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

- a. 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

Save Create a new proposal Other Actions

Your proposal has been successfully submitted. Buyers have been notified. Access History to view all submitted proposals.
Bid Submitted on 4/18/2025 10:15:52 AM

Remaining time: 6d 13h 43min 56s

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

Instruction	Due Date
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)

RFX Documents

Title	Round #	Lot #
Supplier RFX QRG	1	1

1 Record(s)

Early Contract Documents

Connector*

0 Record(s)

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

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

Supplier Documents
Click or Drag to add files

- 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: [] Search [] Reset []

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)