# 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.



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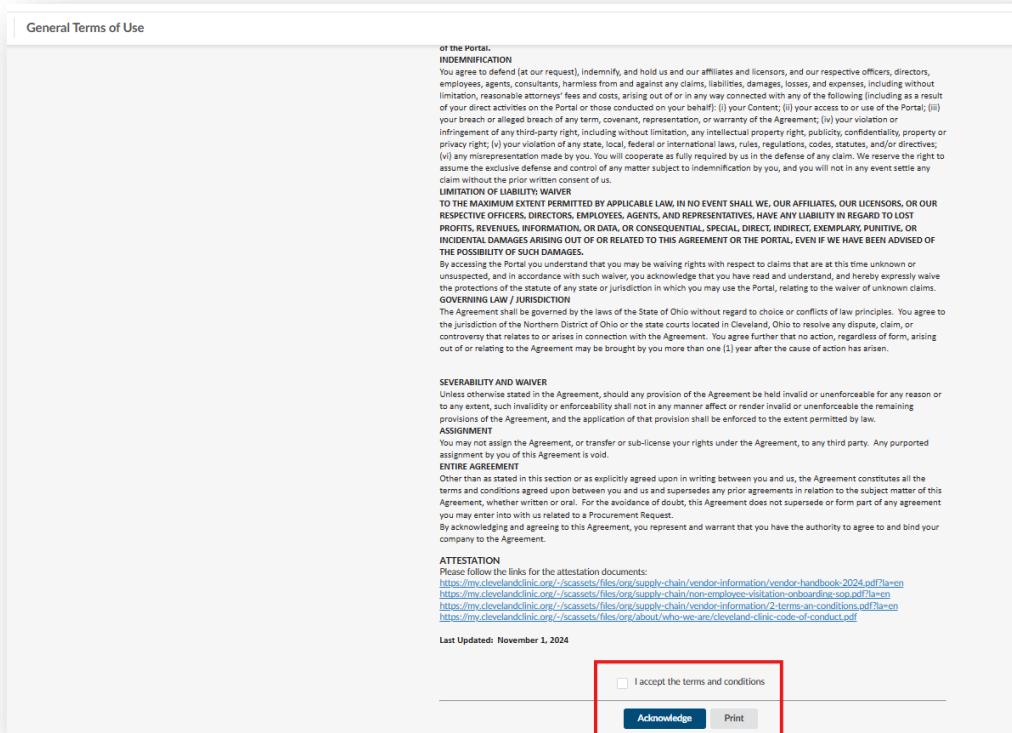
4. You will be directed to the supplier portal home page. Navigate to the sourcing event by:

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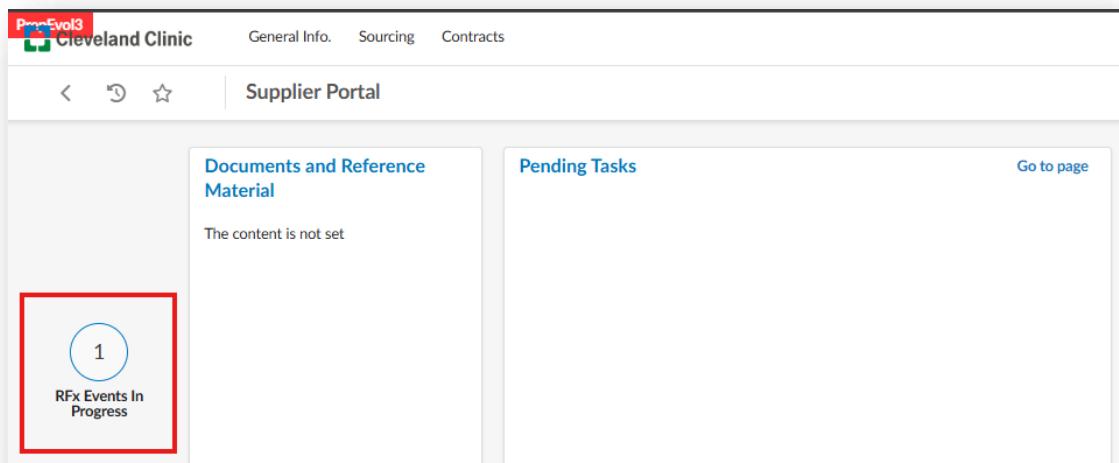


   b. Option 2: Hover over Sourcing and select **MANAGE PROPOSALS.**
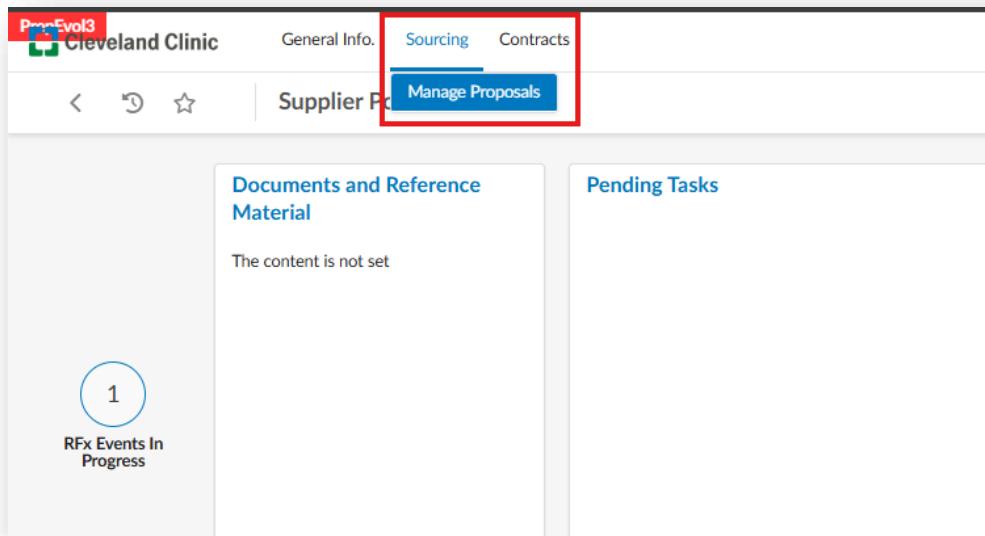
5. You will be taken to Manage Proposals, showing all the rounds linked to the proposal.

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



   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.



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.
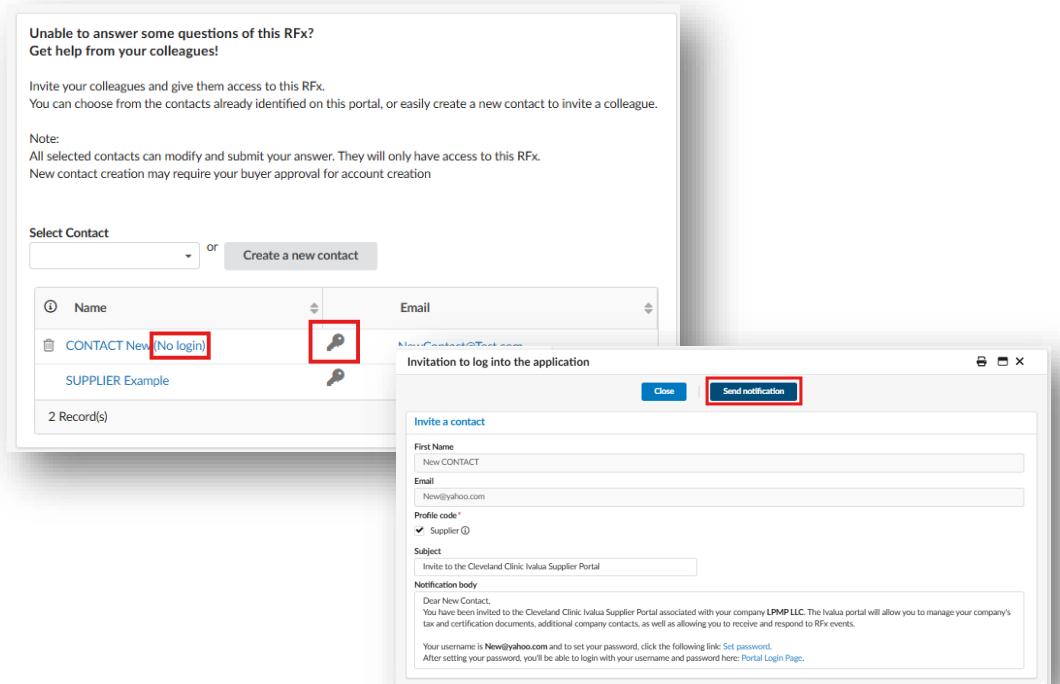
b.  Add a new contact:

  i. Select **CREATE A NEW CONTACT.**
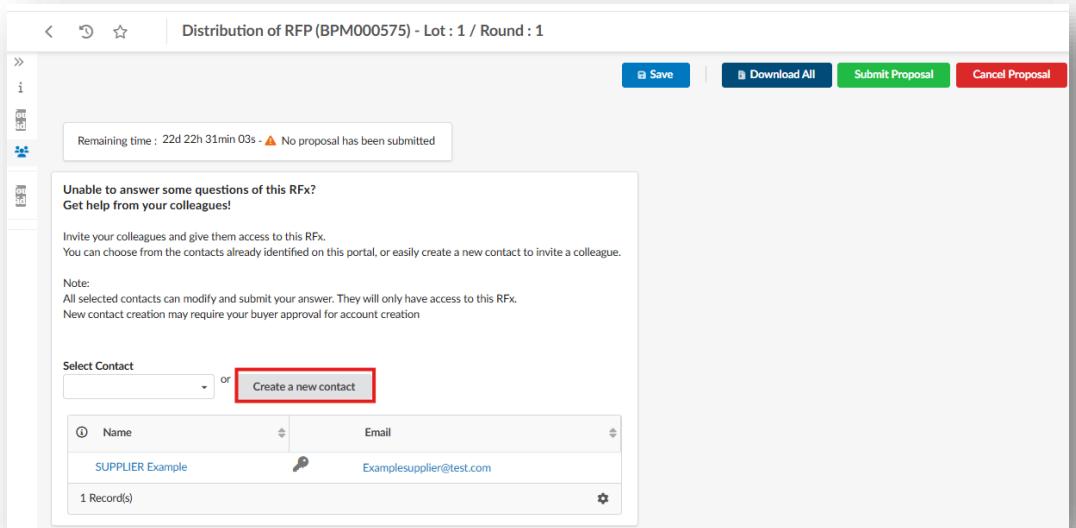
ii. Complete the Required fields and select **SAVE & CLOSE.**
   1. **FIRST AND LAST NAME.**
   2. **EMAIL.**
   3. **PHONE.**

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.**
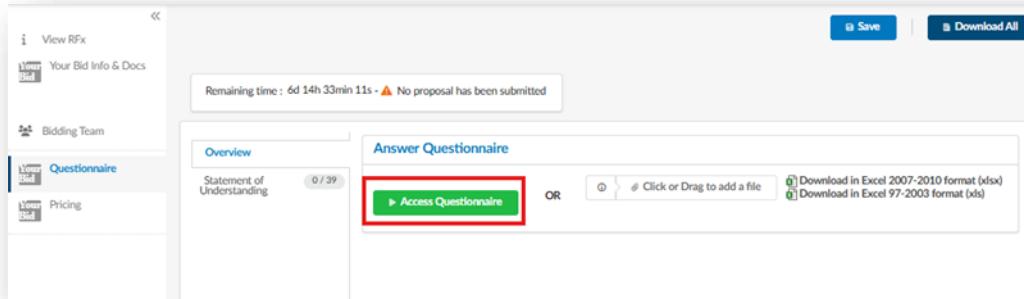


    b. Answer the questions and select **SAVE** at the top of the screen.
       Note: Questions with a red asterisk are required.
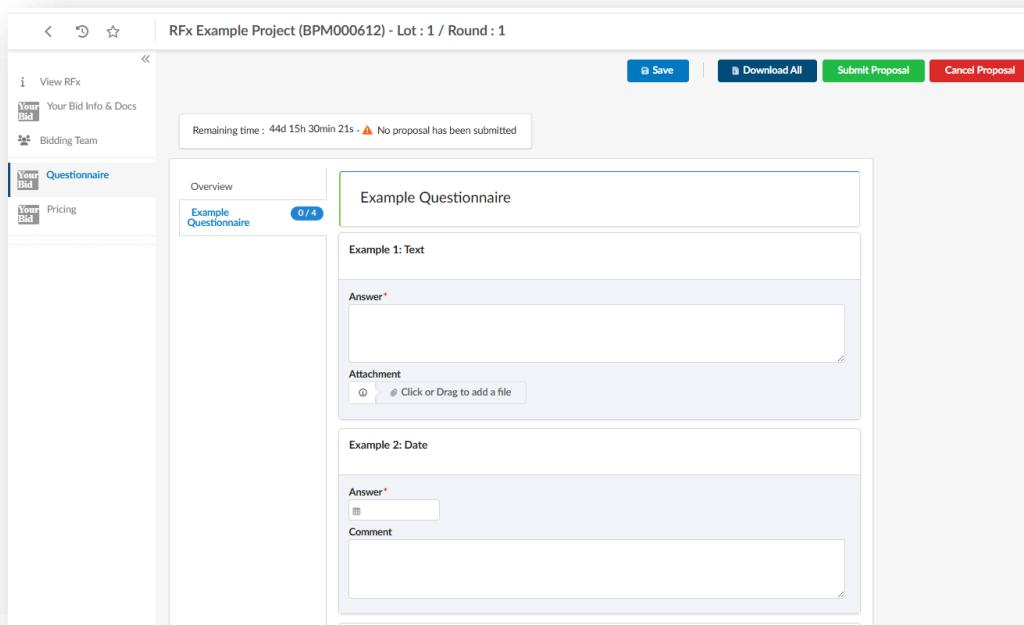


12. Pricing: Navigate to the **PRICING** tab to complete any item grids associated to the round.
    **Important**: Some rounds may have multiple grids which will be separated by the grid tabs.

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.

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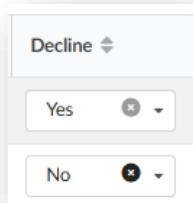


3. If the round allows you to add additional lines and you wish to add more lines, select the **+ ICON** in the grid header.



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.
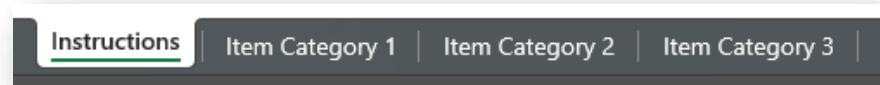
3. Navigate to the grid sheet and complete each grid – Enter the information required.
    a. Columns in white are for the supplier to complete and are optional.
    b. Columns in red are for the supplier to complete and are required.



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.

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

5. Import the grid.

a. **ADD YOUR DOCUMENT.**



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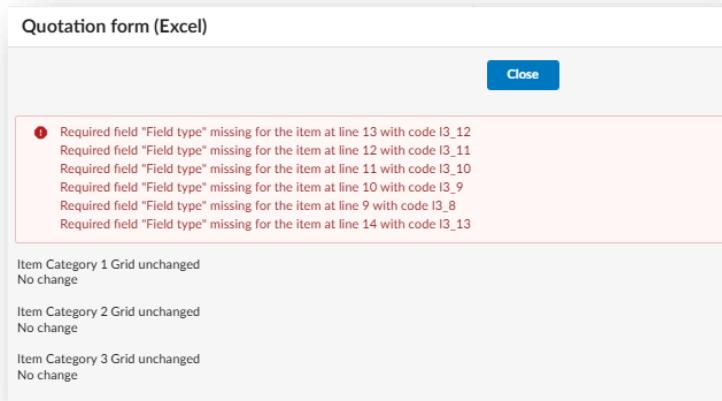
c.  If the grid is completed with no missing fields, you will be provided with the screen below. This will provide how many lines you have modified and added if you added any. Select **IMPORT ITEMS.**

**Quotation form (Excel)**

**Import items**    **Save & Close**    **Close**

Item Category 1 Grid updated

- 6 item(s) modified
- 8 item(s) added

Item Category 2 Grid updated

- 7 item(s) modified
- 6 item(s) added

Item Category 3 Grid updated

- 5 item(s) modified
- 4 item(s) added

d.  Select **CLOSE.**

**Quotation form (Excel)**

**Close**

ⓘ  Import Successful    ✕

**Import Successful**
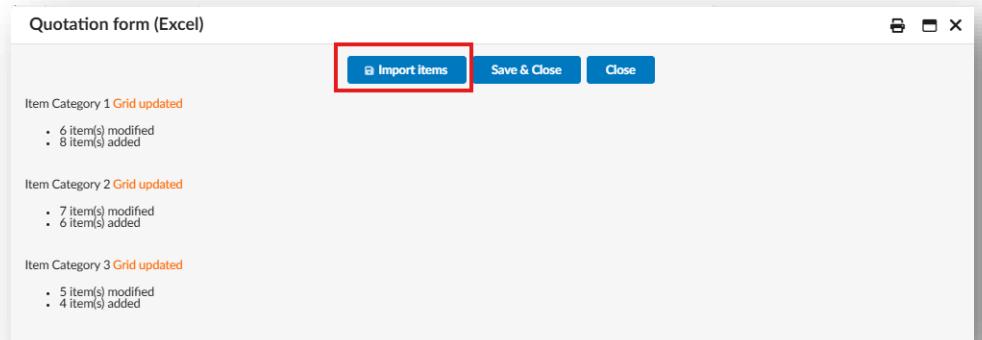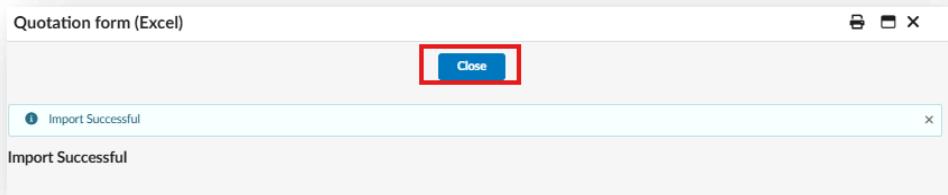
e. The fields will populate on the grid from the import.

| | | 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 | | |

Item Category 1 | Item Category 2 | Item Category 3

0 Selected

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.



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

       Note: This proposal will be closed, and you can no longer edit it.
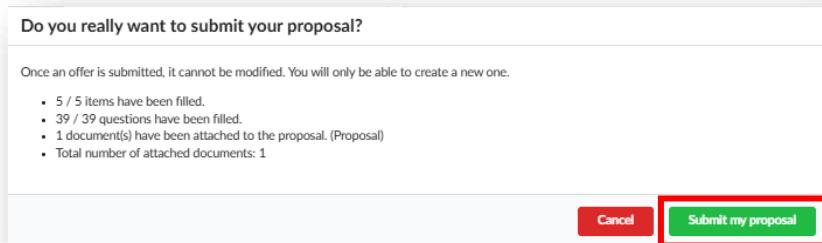
14. If a proposal was already submitted and a change is required, you must create a new proposal. Follow the steps below:

    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.**

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



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.