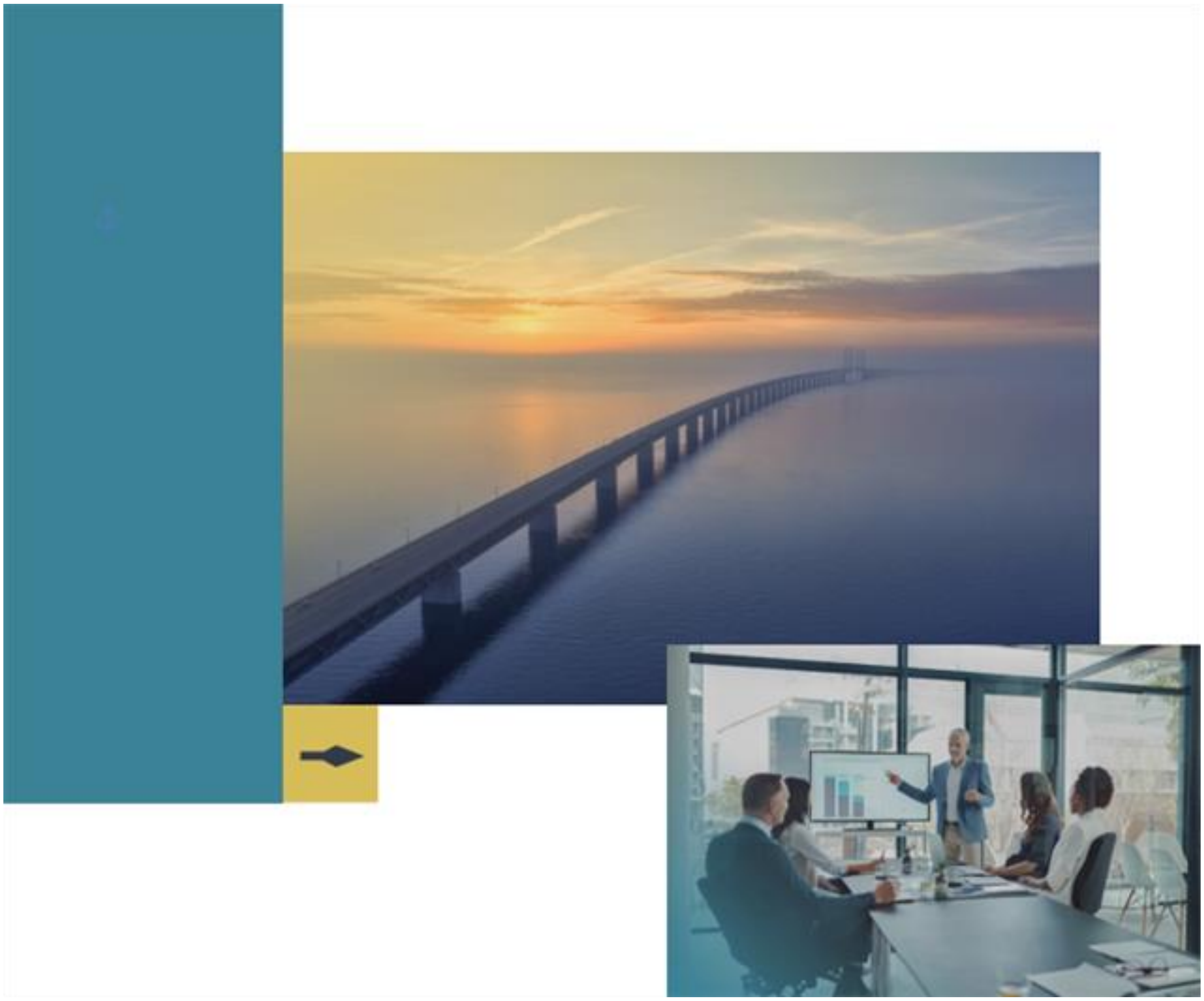


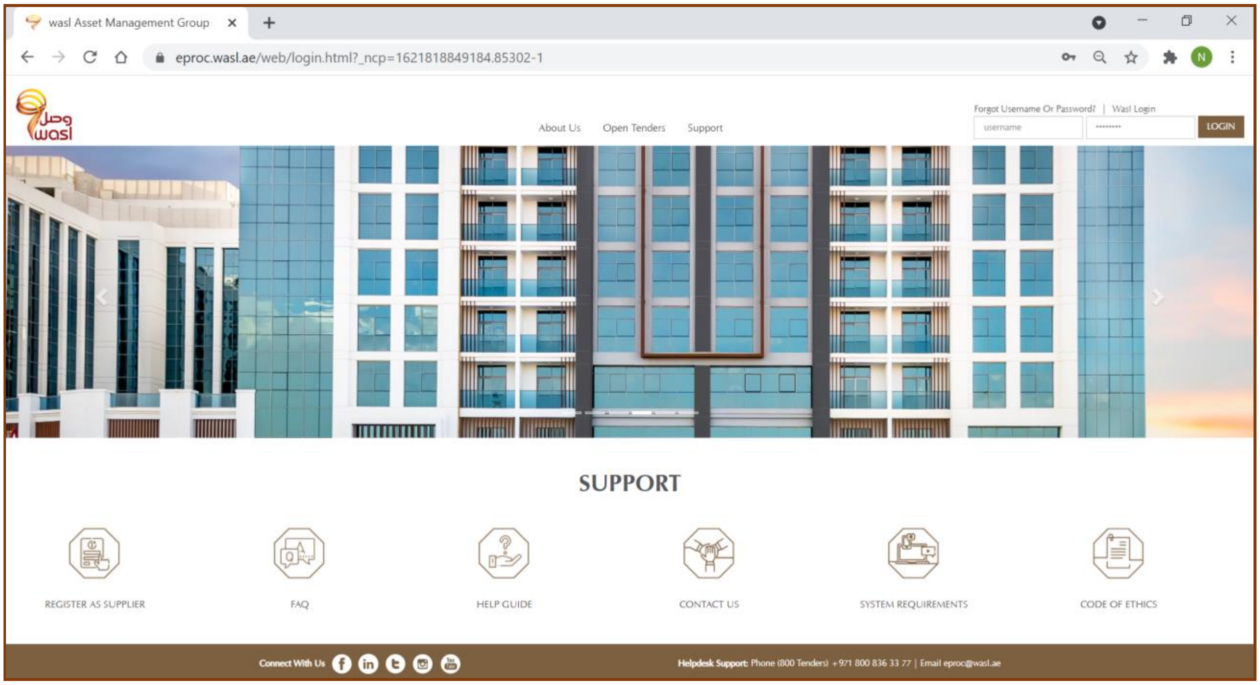
Supplier Handbook

Handbook for Supplier Users

May 2021

Table of Contents

Welcome



Dear Valued Supplier,

Welcome to ‘**wasl Procurement Portal**’ user guide. This user guide will lead you through ‘wasl’ Procurement process and will be delivered through a step-by-step approach.

If you face difficulties at any time during the registration process, you can email our help desk for assistance at eproc@wasl.ae.

wasl’s e-Procurement Portal

https://eproc.wasl.ae

Click on ‘Register As Supplier’ to start the registration process.

Objectives

The purpose of this handbook is to familiarize supplier users with tasks related to wasl Procurement Portal.

- The **Basics** section contains an overview, supplier permissions, and information on navigating JAGGAER ONE as a supplier.
- The **Suppliers** section contains information and instructions on how to register as a supplier and participate in buyer opportunities.

Key Points

The goal of this handbook is to educate supplier users about wasl Procurement Portal.

Introduction

Overview

The JAGGAER Advantage platform is a secure web based collaborative tool used by wasl procurement professionals (buyers and suppliers) to conduct strategic procurement activities online.

Note: This is the main guide to assist you in using the JAGGAER Advantage platform.

Permissions (User Rights)

The following user rights are related to supplier user configuration and administration. User rights may be configured at the role or user level by an administrator:

RFx

- Visibility of RFx Lists
- Access RFx Details
- Create Response
- Modify Before Publishing
- Modify and Submit
- Contact Visible to Buyer
- Messages Management
- View Sensitive Data (including; attachments, response, pricing, etc.)

Supplier Management

- Access Supplier Management

Supplier Performance

- Access Scorecard Results

Development Actions

- Create Action
- View Actions
- Access Action Details
- Contact Selectable as Action Owner
- Manage Messages

User Management

- Manage Users
- Manage Roles
- Manage Users, Roles, Users Lists and Divisions
- Delete Deactivated Users

File Sharing

- Access To Directories

Suppliers

Registration & Onboarding

New suppliers must register on the platform to be considered for sourcing events. Suppliers profile will be activated conditionally after the registration process and upon completion of Qualification process

Upon conditional activation, suppliers must pass the initial onboarding process (completing all mandatory questions in basic profile forms) in order to access the platform and view sourcing events.

Register as a Supplier (Self-Registration)

Step-by-Step

1. On the application login page, click **Register As Supplier**. The Registration Data page opens.
2. Complete the registration form with your organization's details and contact information for the main procurement professional within your organization.
    - Mandatory fields are marked with a red asterisk.
    - Ensure the email address is correct in order to receive the registration confirmation email, please use "User Generic Email" for Super User like "Sales@abc.com", "marketing@abc.com, "tenders@abc.com"
    - To register multiple email addresses, use a semicolon to separate them.
3. Click **Save**. You may receive a registration confirmation email, depending on buyer configuration. You may also receive a verification code in your email for completing the process.

Profile Form

Your profile collects the important information about your organization. It is important to complete your profile and keep it up to date.

- It contains profile forms that may be used to determine your platform access and supplier status.
- Information accumulates as you interact with the buyer organization.
- Your updated response to profile questions in sourcing events and supplier value management objects (e.g. Assessments and Scorecard Survey processes) are saved back to your profile.

Complete Basic Profile Information

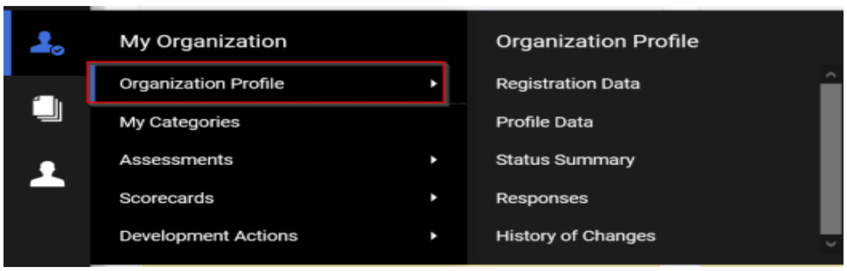
After registering, and depending on configuration, you may be directed to one or multiple onboarding pages (forms) to provide additional information related to your company.

Complete the onboarding pages. You must complete this information to be considered for activation. You should update your profile as needed to ensure the most up-to-date information is available in the system. Once the onboarding page is complete, click **Save & Continue** to proceed with the remaining onboarding process.

wasl organization's registration configuration will proceed Category **Selection** page where you need to select your organization's business classifications. Once selected, click **Confirm**.

To login to the application, use the Username you entered during registration and the temporary password to log in for the first time. Enter a new password when prompted.

Note: After you are registered ,you should update your Profile as needed to ensure the most current information is available in the system. You can navigate to your profile by accessing **My Organization** **> Organization Profile > Registration Data** on the navigation menu.



Complete Profile Data

Step-by-Step

Additional Profile Pages (Forms) might be available to you (if configured by organization) after you have successfully registered and logged into the platform.

1. Navigate to **My Organization** **> Organization Profile > Profile Data**. Note the Completion status, indicating if the Page information has been completed:
   - Green icon - all mandatory data element values are completed.
   - Red icon - at least one missing mandatory data element value.
   - Empty - no mandatory values are embedded in the page.
   - You can view details about the page completion by selecting the **Show Completion** button. Click the **Hide Completion** button to collapse the detail columns
2. Click the **Title** to view the form content.
3. Click **Edit** to switch the form to edit mode.

4. Enter responses for all the mandatory questions (red asterisk). It is recommended to answer optional questions, so the buyer has as much information about your organization as possible. Non-editable questions are answered by buyers or provided by an external system.

5. Click **Save and Continue** to save your responses and move to the next form, if applicable.

Login to Application

Login

Step-by-Step

1. Click the link in the registration confirmation email or go to the platform URL to access the login page.
2. Log in with the username and temporary password found in the email.
3. Enter and confirm a new password.

Forgot Your Password?

Step-by-Step

1. Click on the **Forgot your Username and Password?** link
2. Fill in your username and email address.
3. You will receive an email with a link to reset your password.

Forgot Your Username?

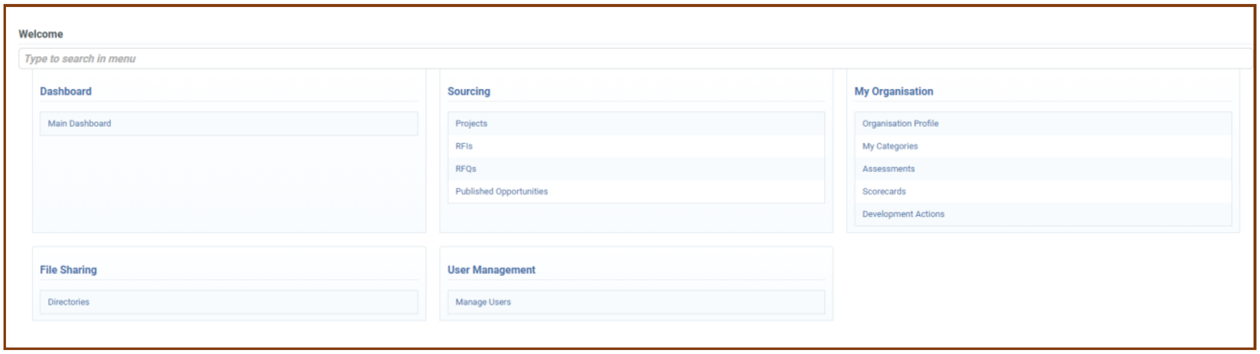
Step-by-Step

1. On the login page, click **Forgot your Username and Password?**
2. Click **Recover Username**.
3. Enter your email address and validation value.
4. You will receive an email with a link to access your username.

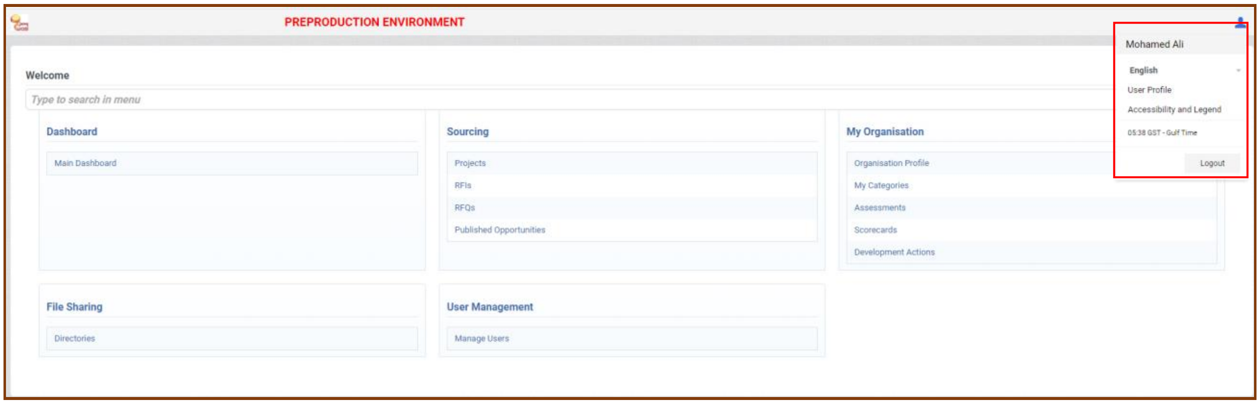
Navigating

Supplier Home Page

The Supplier Home page is usually the default page displayed after login.



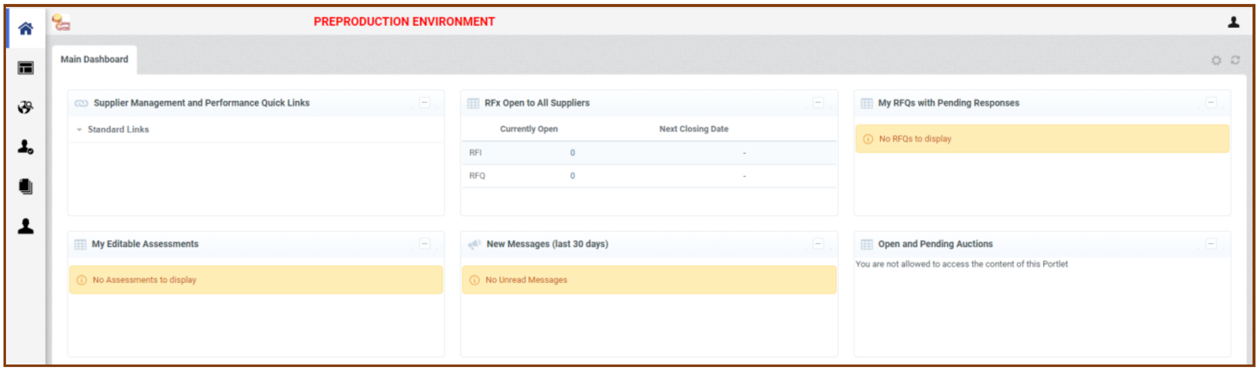
On the upper right corner of the page, you can find links to view accessibility guidance, access your user profile, and log out. You may change your language, user details, and password within the User Profile.



The main area of the Supplier Home page displays links to the available modules, so you can use this page to reach any part of the platform.

Navigation Menu

The navigation menu is located on the left side of each page, and allows you to navigate from one module to another. To do so, click on a module icon to expand the menu and then select a link, to be directed to the page you want to access.



The following modules may be available:

- **Dashboard**  - The Dashboard contains portlets that provide an overview of your activities and gives you access to them.
- **Sourcing**  - The Sourcing module contains access to projects, sourcing opportunities, auctions, and contracts.
- **My Organization**  - In this module, you can view and manage your profile, categories, assessments, scorecards and development actions.
- **File Sharing**  - This is a buyer managed module. If activated by the buyer organization, you will have read-only access to files that have been made available to you.
- **User Management**  - This module is available to users who are given the rights to manage users, roles and divisions within your organization.

Organization Profile

To view organization profile information, navigate to **My Organization > Organization Profile**, then select the tab you would like to view.

View Organization Profile

- **Registration Data** - Contains a record of the organization details you entered when registering as a supplier. Click the Edit button to change any of the available fields.
- **History of Changes** - Contains a record of the changes made to registration data and primary supplier status (e.g. supplier activation). **Note**: Depending on the organization's configuration, this tab might not be available in the Organization Profile.
- **Profile Data** - Contains a record of all Profile Forms to which you have access. A **Phase** displays for each Form, indicating if the page is displayed during Onboarding (before activation) or if the page is for Additional Information collection when logging to the application (after activation).). Click the title of each page to view the details. You can also click the **Edit** button on the details page of any section to edit the available fields
- **Status Summary** - Contains information related to the completeness of your registration and organization status.
- **Response History** - Contains the history of the values answered for each question.

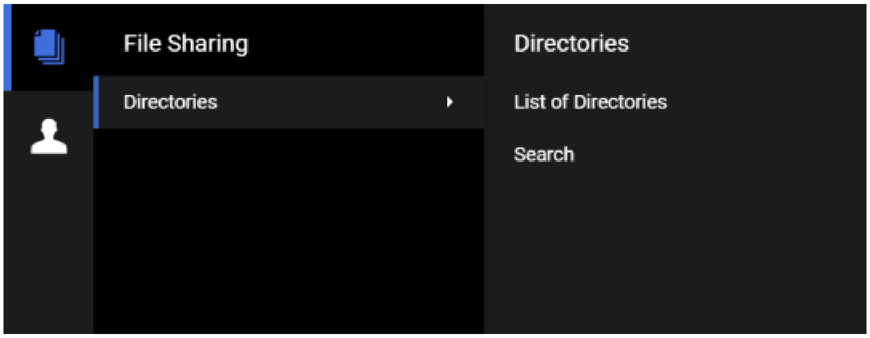
File Sharing

With the File Sharing solution, buyers may choose to allow read-only access to files that have been made available to the supplier organization.

View Shared Files

To view shared files, navigate to **File Sharing > Directories**, then select one of the following:

- **List of Directories** - This page lists the shared file directories you have access to.
- **Search** - This page provides advanced search functionality for searching for files shared with you.


File Sharing
Directories
Directories
List of Directories
Search

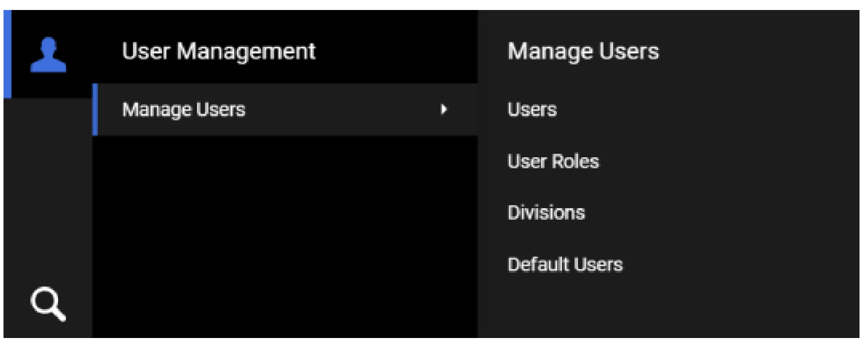
User Management

Manage Users

The Super User is the first user that registered on the platform and is responsible for managing other users. The User Management module is where the Super User manages individual user accounts, divisions, user roles, and organizational activity assignments.

Depending on configuration and user access, you may have access to the following pages under User Management:

- **Users** - Only users with the "User Setup and Management" right can create user accounts and manage user rights and roles. They can modify User details, modify User Rights, create user Roles and create Divisions.
- **User Details** - This allows you to configure User contact information, Role, Division, language settings, and Username.
- **User Rights** - This allows you to configure user visibility and access rights to RFx, Bid Collectors, Auctions, Contract Management, Supplier Management, Supplier Performance, Development Actions, User Management and File Sharing (if activated by the buyer organization). User Rights can be packaged into User Roles for quick user right assignments.
- **Default Users** - Allows only the Super User to manage a specific User account to receive all email alerts related to events to which your Organization is invited and to manage activities in those events on behalf of your organization.



Users

Only users with **Manage Users** right can create a user account. The "Superuser" has this right by default.

Create User Account

Step-by-Step

1. Navigate to **User Management** **> Manage Users > Users**.
2. Click **Create**. A page for creating the new user opens.
3. Complete the **User Details** fields. Mandatory fields are marked with a red asterisk.
4. Click **Save** to create the new user account.

The user will receive a system generated email with their login information. By default, user rights are NOT assigned to a newly added user, unless the user was assigned a Role with user rights configured during account creation.

Edit User rights

Step-by-Step

1. Navigate to **User Management** **> Manage Users > Users**.
2. Click the **User's Name** to open the User Details page for that user.
3. Click the **User Rights** link under the Details tab.
4. Click **Edit** to switch to edit mode.
5. Amend the user rights in each module by selecting the relevant options from the dropdown lists.
6. There are typically three levels of access you can select for each user right:
    - No (No access at all)
    - Yes, if I'm added to the User Rights list in the Object (Access is given to user within the individual Auction, RFx, and/or Contract)
    - Yes (Access is given to all events)
7. Click **Save** to save the updated level of access.

> Two shortcuts are available (**Set Full Rights** and **Set Minimum Rights**) when editing the user rights in order to set all the permission to the maximum value and minimum value for all rights or a particular section.

Check User Status

Step-by-Step

1. Navigate to **User Management** **> Manage Users > Users**.
2. Open the drop-down menu (Enter Filter) next to the **Filter By** option.
3. Select **User Status** option from the drop-down.
4. Select **Active / Deactivated** option and click on **Search**.
5. The list of users will appear according to your search.

User Roles

Users with the **Manage Roles** or **Manage Users, Roles, User Lists and Divisions** right can group user rights into roles, to quickly apply to users who require the same access configuration. **Note**: The "Superuser" has this right by default. The rights for each user account can still be manually revised after the role assignment.

Create User Role

Step-by-Step

1. Navigate to **User Management** **> Manage Users > User Roles**.
2. Click **Create**. A page for creating the user role opens.
3. Enter a **Role Name**. It must be unique within the organization.
4. Select yes or in the **Shared Role** dropdown. This determines whether the role is visible and selectable by all divisions
5. Amend user rights for the role as needed.

   Note: Two shortcuts are available (**Set Full Rights** and **Set Minimum Rights**) when creating a role in order to set all the permission to the maximum value and minimum value for all rights, or a particular section.

6. Click **Save**. The new user role is created.

You can now return to the existing users and update their Role assignments as needed.

Divisions

Users with the **Manage Users, Roles, User Lists and Divisions** right can create Divisions to group users within the organization. **Note**: The "Superuser" has this right by default.

> You can only create a new division if there is a user available to serve as the Division Manager. Each User can only serve as the manager for one division.

Create a Division

Step-by-Step

1. Navigate to **User Management** **> Manage Users > Divisions**.
2. Click **Create.** A page for creating the new division opens.
3. Enter a **Name** and **Description** for the division.
4. Select a user to be the **Division Manager.**
5. Click **Save**. This will trigger a reset of the divisions manager's user rights. Remember to re-define the user rights for the newly appointed division manager.

Default Users

This page allows the super user to manage a specific user account to receive all email alerts related to sourcing events to which your organization is invited, and to manage activities in those events on behalf of your organization.

The super user can set default users for the following:

- RFIs/RFQs
- Opportunity Emails
- Scorecard Surveys
- Development Plans

Delete Users

Depending on the organization's configuration (if this feature is available), users with the **Delete Deactivated Users** right can delete the deactivated users. **Note**: The "Superuser" has this right by default.

> This permission will be available only to users belonging to the division of the Superuser.

Delete a User

Step-by-Step

1. Navigate to **User Management** **> Manage Users > Users.**
2. Deactivated users are identified with icon. Select the user that should be deleted:
    - If a user is not deactivated yet, access the user's profile then click the button and choose **Deactivate User** option.
    - Mark the checkbox and click **Confirm.**
    - If you wish to reactivate the user, click the button when accessing the **User Details** page.
3. Click the button and choose **Delete User** option.
4. Mark the checkbox and click **Confirm**. The deleted user will be removed from the system.

Sourcing Events

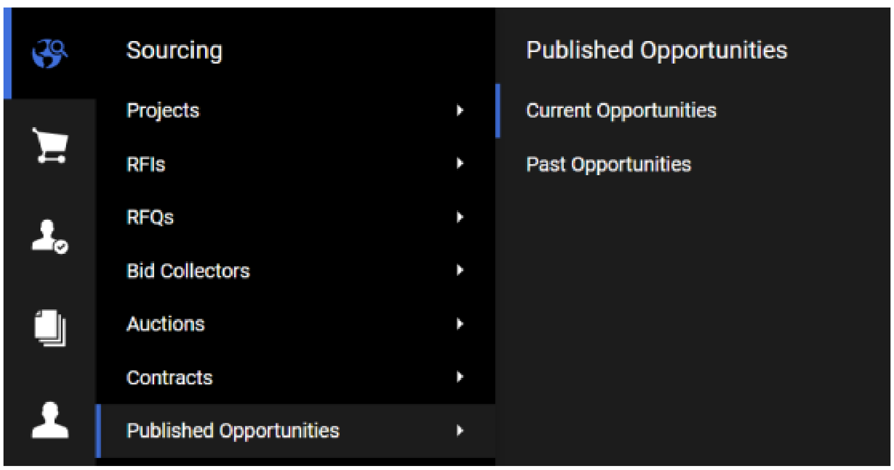
Opportunities

Opportunity Listings are used by the buying organization to advertise forthcoming public procurements. Suppliers can then express interest in an RFx that is linked to the Opportunity.

See RFx for more information.

Published Opportunities

Opportunities can be viewed from the login page by anyone. However, you need to register and login to express interest and participate in sourcing events (linked to opportunities).



Express Interest in a Current Opportunity

Step-by-Step

1. Navigate to **Sourcing** > **Published Opportunities > Current Opportunities**.
2. Click on the project title to view project details.
3. Review project and opportunity details. The Published Lots section displays RFx that are linked to the listing.
4. Click on the **Comment** button beside the RFx you want to express interest in. Details of the RFx are displayed.

5. Review the RFx details and click **Express Interest**. A pop-up opens explaining that you are about to express interest in the RFx.

6. Click **OK**. Another pop-up opens explaining that you have expressed interest in the RFx and to create a response for the RFx.

7. Click **OK**. After expressing interest, depending on the type of RFx, the RFx is moved to either the My RFIs or My RFQs area.

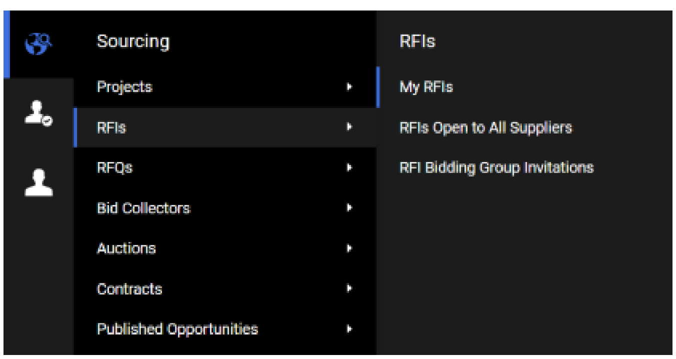
> When accessing the list of Sourcing events (e.g. **Sourcing** **> Published Opportunities > Current/Past Opportunities**), you can see the **Division** column to better identify the companies/divisions of the Buyer Organization in the negotiation events (including Opportunities, RFx, Contracts and Auctions). This column will be available in case customers are configured with a **Single Buyer Organization** and multiple **Divisions** that correspond to different companies. **Note**: This column must be enabled by the Buyer Organization.

RFx

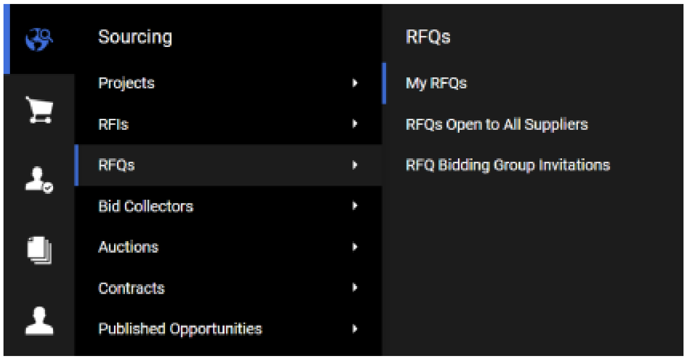
RFx is an umbrella term used to describe a buyer's request submitted to a group of suppliers as a set of questions in order to assess suppliers for an event or project. Supplier responses are sent only to the buyer; no information is shared between suppliers in the group.

The term RFx includes:

- **RFIs** (Requests for Information) are used to collect qualification and technical information from suppliers in order to evaluate the supplier base and to narrow the field of competition to qualified suppliers. Closed RFIs on cannot be awarded, but they can be finalized and converted into RFQs. **Note**: RFI may be indicated as PQQ in some locations.



- **RFQs** (Requests for Quotation) are used to collect detailed technical and commercial information from pre-qualified suppliers in the form of a private offer. Closed RFQs on the platform can be converted into auctions, or they can be awarded and converted into contracts for suppliers. **Note**: RFQ may be indicated as ITT in some locations.



Buyers can configure the settings of an RFx differently, such as the response deadline and awarding strategy, to regulate how suppliers will participate in the event. Buyers can choose from the following options for viewing supplier responses to an RFx:

- **Unsealed -** Responses can be viewed by buyers while the RFx is running.
- **Sealed (sequential/parallel) -** Responses remain hidden from buyers until the RFx deadline has passed.

Prepare and Submit RFx Response

Supplier responses can be provided within the JAGGAER ONE interface, or by downloading the questionnaire in Excel format, completing it offline, and then importing the updated file to the JAGGAER ONE Platform.

> **Important**: Sharing login credentials or multiple users working in the same user account from different web browser sessions or devices can lead to issues and is strongly NOT ADVISED. This behavior can create a concurrency error when the two users are making changes at the same time and may result in updates not being saved.

Prepare RFx Response

Step-by-Step

Note: The following steps display navigation for responding to an RFQ. The steps for responding to an RFI are identical.

1. Navigate to **Sourcing** **> RFQ**.
2. Select one of the sub-menu items:
    a. **My RFQs -** View the **Response Status** for each RFQ and identify the RFQs that require action.
    b. **RFQs Open to All Suppliers -** Filter or browse these lists of all RFQs that are publicly available.

i. Each RFQ contains an **Express Interest** action button which moves the RFQ to the **My RFQs** area.

ii. Once a publicly-available RFQ has been moved to the My RFQ area, you can view the RFQ details, download buyer attachments, view and send messages, and submit a response.

3. Click the **Title** link to open the RFQ. The RFQ opens to the **My Response** page.

   - Along with the RFQ and project titles and codes, the RFQ header displays the closing date and supplier submission date. If the response date has passed, this information will be highlighted in yellow.

   - If the buyer has provided instructional attachments to the RFQ, a link to the attachments is displayed above the RFQ navigation. This link takes you to the **Buyer Attachments** area.

4. On the **My Response** page, you can choose to **Create Response** or to **Decline to Respond**.

   - Click **Create Response** to begin the response creation process.

   - If you choose to decline, you are presented with an optional field to enter details for declining.

Create Online Response

Step-by-Step

1. Navigate to the RFx and click **Create Response**.

2. A pop-up opens explaining the next steps. Click **OK**.

3. The first section of the response page is the **My Response Summary.** This section keeps track of your response progress based on the mandatory questions answered.

4. Click **Edit Response** to edit your response for each section. Some RFx have multiple sections while others have one.

5. Provide responses to the available questions. Mandatory questions are marked with a red asterisk.

6. Upon completion of a section, click **Validate Response** to ensure that all mandatory questions are answered and that the responses provided are in compliance with the required format.

7. Click **Save and Continue** to save. Alternately, click **Save and Return** to save and exit the current section and navigate back to the **My Response** page.

Create Offline Response

Step-by-Step

If you want to respond to the RFx offline, you can download the questionnaire as an Excel spreadsheet, complete it offline, then import the file to populate the online RFx with your answers.

1. Navigate to the RFx and click **Create Response**.
2. Click the ... dropdown button and select **Export/Import Response**.
3. Click **Download** to download the questionnaire in Excel format.

   Note: If you have questions regarding the types of questions and how to work with the Excel questionnaire, click **Help To Create & Import Your Response** for detailed instructions (**RFQ details > My Response Page > Export/Import Response > "Help To Create & Import Your Response"** button). A new browser will open to guide you on creating and importing a response by Excel spreadsheet.
4. Open the Excel file locally and answer the questions. Cells for mandatory responses are color-coded yellow. Cells for optional responses are color-coded blue.
5. When done, save the file and return to the **Export/Import Response** page.
6. Use the **Choose File** look-up to select your file, then click **Import Excel** to upload your response.
   - The system will run a compliance check to ensure that there are no missing rows, invalid responses, or missing mandatory responses. If all validation checks pass, the file is uploaded. If not, you are prompted to correct the errors indicated by the system message and re-import the questionnaire.
7. Click **Save Changes** to save.

Submit Response

When the response is complete, you can publish your responses to the buyer organization by clicking **Submit Response** on the **RFQ Details > My Response** page.

If any mandatory data is missing or invalid, a pop-up box will indicate the fields that must be corrected before the response can be submitted.

Step-by-Step

1. Navigate to the RFx.
2. Click **Submit Response**. A pop-up opens explaining that you are about to submit the response.
3. Click **OK**. A pop-up opens explaining that you have submitted your response.

4. Click **OK**. In the RFx header, the response status changes from Not Submitted Yet to Response Last Submitted On [date/time].

Manage an RFx

Modify Response

Suppliers may edit and resubmit their responses at any time before an RFX's **Closing Date and Time**.

- To modify responses online, navigate to **RFQ Details > My Response** and click **Edit Response**. When finished, you have the option to **Keep Changes** or to **Discard Changes**. Once all changes are complete, click **Submit Changes** to finalize the modifications.
- To modify responses offline, download the Excel questionnaire, update your responses, and then import the questionnaire into the system.

Suppliers may be asked to modify their responses under the following conditions:

NEW ROUND LAUNCHED IN CURRENT RFQ

In the new round, buyers may choose which sections, questions and items are made available for suppliers to edit and resubmit. Selected suppliers receive an alert about the new status of the RFx.

If you are selected, you will see an **Edit Response** button beside each section that is editable in your RFx response. You must click **Edit Changes** and **Keep Changes** (if you decided to update your response) in order to return to your response overview page and access a **Submit Changes** button.

ASK FOR BEST AND FINAL OFFER

The **Best and Final Offer (BAFO)** feature allows buyers to ask selected suppliers to amend and resubmit responses to the Commercial envelope by a specified deadline. Buyers may choose which sections, questions and items are made available for the supplier to edit and resubmit. Selected suppliers receive an alert about the new status of the RFx.

If you are invited to a BAFO round, you will see an **Edit Response** button beside each section that is editable in the RFx response. To provide a Best and Final Offer, update your response, then click **Edit Changes** and **Keep Changes** to return to the response overview page and access a **Submit Best and Final Offer** button.

Delete Response

If the answer has not been submitted, you may delete the response at any time before an RFx's closing date and time. If the answer has been submitted, you may delete the responses only during the first round of the sealed RFx.

To delete a response, navigate to **RFQ Details > My Response** and click the **Delete Response** option in the **More ··· menu.**

Once confirmed, your previous response will be deleted. You are returned to the **My Response** page, where you have the options to **Create Response** or **Decline to Respond**.

Withdraw Response

Depending upon RFx configuration, you might have the option to withdraw from the RFx without deleting your response. To withdraw from the RFx, navigate to **RFQ Details > My Response.** A **Withdraw Response** button appears beside the More ··· drop-down menu at the top of the **RFx Details > My Response** page. When you click this button, the following changes occur:

- A confirmation pop-up appears, requiring you to click **OK** to confirm the RFx withdrawal.
- All response details are saved in draft version and the RFx status returns to "Response to Be Submitted to Buyer".
- An alert is sent to both the buyer and the supplier indicating that the response has been withdrawn.
- A **Delete Response** option appears in the More ··· drop-down menu at the top of the **RFx Details > My Response** page.

Suppliers that have withdrawn from the RFx can still submit responses any time before the RFx closing date and time.

RFx Messages

When the messaging feature is activated, suppliers can contact the buyer through the Messages area within the RFx with any questions related to the event.

Note: The **End Date for Buyer Replies to Messages** field on the RFx Settings page indicates the date by which the buyer can respond to queries.

Create and Send Message to Buyer

Step-by-Step

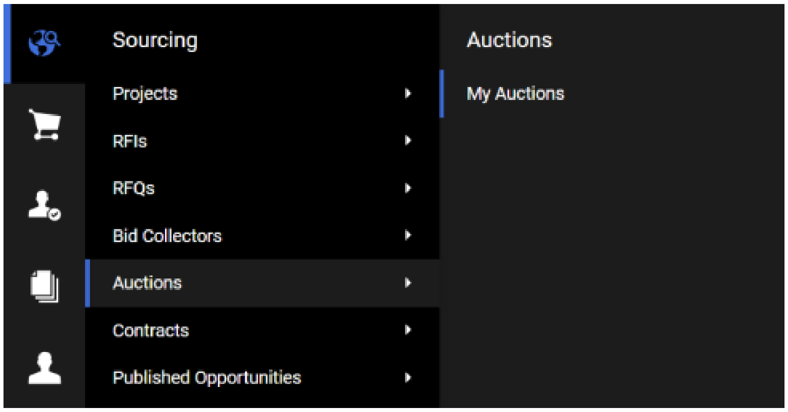
1. Navigate to the RFx.
2. Navigate to the **Messages** tab, then click **Create Message**. A page for creating the new message opens.
3. Select a **Message Classification**. Classify the message if the buyer organization has the categories configured.
4. Enter a **Subject**.
5. Enter the **Message**.
6. Optionally, add an attachment to support your message.
7. Click **Send Message**.

Under the Messages tab, a Sent Messages area is displayed. From this page, you can keep track of sent messages, see if they were read by the buyer, and see the message replies.

Reply to Buyer Message

Step-by-Step

1. Navigate to the RFx.
2. Under the **Messages** tab, navigate to the **Received Messages** page.
3. Click **Reply** to compose your message to the buyer.
4. Click **Send Message** to send your reply.



Supplier Management

Categories

Categories are used to classify your organization against a Category Tree to indicate the categories of supply (product or service) your organization provides. Wasl allow the category tree to be displayed during the onboarding process. Suppliers can add classifications at the leaf (lowest) level of the Category Tree.

It is important to classify your organization in the most relevant categories and in as many categories as possible, to ensure that you get all related opportunity listing alerts. For example, opportunity listings are used by the buying organizations to advertise future public sourcing events for specific categories of supply.

Your classifications may also be used as the basis for formal supplier category assessments.

Buyers may associate Forms with categories. The **My Categories** page lists all of your categories and associated forms, their completion status, and assessment status (if the category is set-up for formal qualification).

Search and Select Categories

Step-by-Step

Depending on the buyer organization, Category Tree classification may be completed during or after the registration process.

1. Navigate to **My Organization** **> My Categories.**
2. Click **Add Category** to view the category tree. Each category may have levels of subcategories. You can use the Display Selected Only, Expand All, and Collapse All buttons to control the display of subcategories in the tree.
3. To search for categories, use the **Free Text Search** feature by entering a keyword or category code, then click **Search**. The tree refreshes and displays the matching categories.
4. Select the appropriate **category or categories** (at leaf level).
5. Click **Confirm Current Selection**. The selected categories are saved to your list of categories and you are returned to the My Categories page.

Complete Category Specific Forms

Buyer organizations can associate forms to specific categories in the category tree. As you make category selections, you may be navigated to a page to complete the associated category form.

Enter responses for the available fields. Mandatory fields are marked with a red asterisk. Click Save to save your responses and return to My Categories.

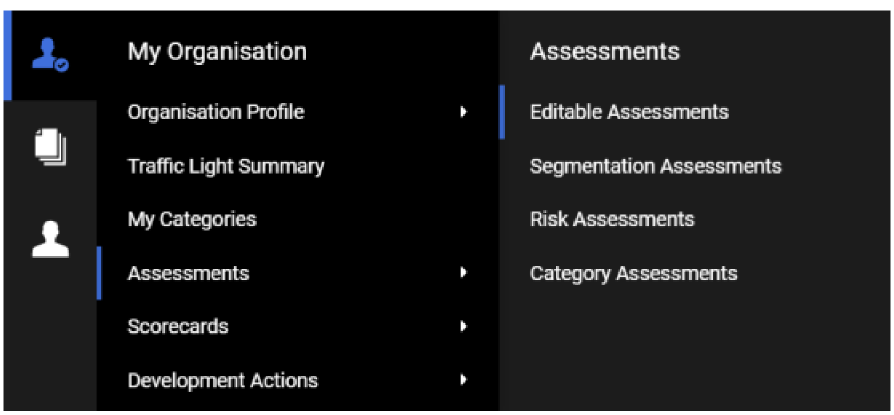
Assessments

To view the Assessments area, navigate **to My Organization** **> Assessments**, then select the type of assessments you want to view.

The Assessments area contains access to the following pages:

- **Editable Assessments** - Contains a list of editable assessments.
- **Segmentation Assessments** - Contains a list of segmentation assessments.
- **Qualification Assessments** - Contains a list of qualification assessments.
- **Risk Assessments** - Contains a list of risk assessments.
- **Category Assessments** - Contains a list of category assessments.

Note: Buyers control supplier visibility of assessment details. Therefore, suppliers may or may not be able to view assessment details from various buyers.



Manage Assessments

Edit Assessments

Step-by-Step

1. Navigate to **My Organization** **> Assessments > Editable Assessments**. The page opens with a list of editable assessments and their completion percentages.

2. Select the **Assessment** to edit by clicking on its name.

3. Click the **Edit** button. The form switches to editable mode.

4. Enter responses to the fields on the form.

5. Click **Save and Continue**. The form is saved and you are prompted to return the forms to the buyer or do it later.

Once a form is returned to the buyer, it is no longer editable and will no longer appear on the Editable Assessments page.

Scorecards

To access the Scorecards area, navigate to **My Organization** **> Scorecards** and select the type of scorecards you want to view. The Scorecards area contains access to the following pages:

- **In Progress Surveys -** This page displays surveys that the buyer has requested to be completed. The supplier super user may be requested to complete a supplier survey on a scorecard from a notification sent to their email address. They can access surveys through a link in the email notification or by logging into the application.

- **Enterprise Scorecards** - Enterprise scorecards are directly linked to a supplier profile. They are used to assess the supplier's performance in terms of their relationship with the entire buyer organization.

- **Segmentation, Qualification, Risk Scorecards** - These scorecards are used by buyers for **Universal Assessments**, such as associating a quantitative evaluation to a qualitative result of the assessment process.

- **Category Assessment Scorecards** - These scorecards are used for **Category Assessments** by buyers. These are typically used to associate a quantitative evaluation to a qualitative result of the assessment process.

Respond to a Supplier Survey

The supplier super user may be requested to complete a supplier survey on a scorecard from a notification sent to their email address. They can access surveys through a link in the email notification or by logging into the application.

Step-by-Step

1. Access the supplier survey using one of these options:

   Via Email

   a. In your email provider, find the email that contains "Enterprise Survey Response Required On: [organization platform]".

   b. Click on the **link** at the bottom of the email. Enter your supplier user login credentials and click on the **Submit** button. You are taken to the Supplier Survey page in the application. A list of questions that have been made available to the supplier are displayed.

   From the Application

   a. Enter your supplier user login credentials and click **Submit** button to open the application.

   b. Navigate to **My Organization** **> Scorecards > In Progress Surveys**.

   c. Open the **Scorecard** with the survey you want to complete. You'll be taken to the **Survey Form**.

2. On the Survey Form, enter a value in the open **Response** field for each KPI.

3. (optional) If you want to send a message to the buyer, click the **Access Scorecard Messages Area** link, then create and send a message.

4. Choose one of these options:

   - Click **Save** to save your responses and return to the survey later.
   - Click the **Save and Complete Survey** button to complete the survey, then click **OK** in the pop-up window.

Receive and Send Messages as Supplier

A supplier's main contact will receive an email when a message is sent to the supplier from a scorecard. They can use a link in the email to open the email and reply to it from the application. The reply is displayed on the Messages tab on the scorecard.

Step-by-Step

1. In your email provider, find the email that contains "New Message for [name] Scorecard on: [organization platform]".

> **Note:** Only the Subject of the message is visible in this email. You will not be able to read the message itself until you sign into your supplier user account and access it within the platform. The scorecard must be visible to the supplier.

2. Click on the **link** at the bottom of the email.
3. Enter your Login Credentials and click the **Submit** button. You can now see the body of the email message.
4. View the range of actions available to you within the Messages toolbar:
    - **Back** - Return to the Received Messages list.
    - **Reply** - Reply to this message using the secure online messaging system.
    - **Forward** - Forward this message to an email address outside the platform. This feature is dependent on your platform's configuration.
    - **Print** - Print the contents of the current page.
5. Click **Reply** to begin drafting your response to the message. You will now be in the Create Message page and the Subject line is already filled in, similar to a standard email. The message from the buyer is also displayed.
6. Enter the **comment** you want to send in the **My Message** field.
7. Click **Send Message**.

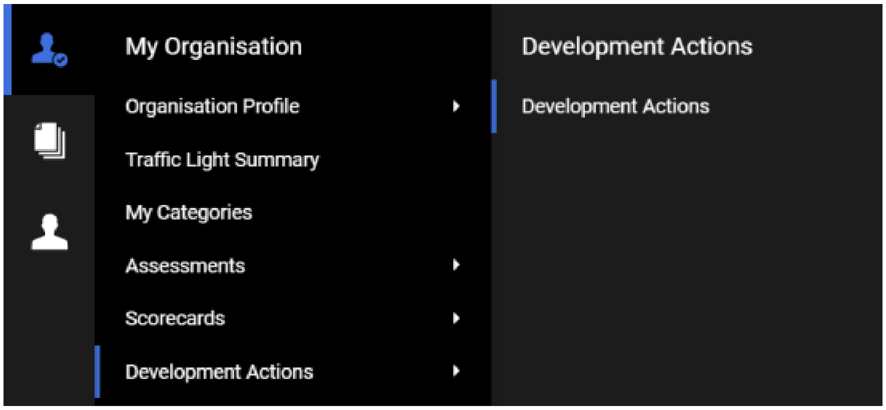
Development Actions

Organizations may utilize a Supplier Development Plan after evaluating the supplier performance and identifying the areas of growth / improvement. Based on the supplier performance, a plan will be designed with a specific set of actions for the supplier to complete in order to achieve the objective of the plan.

To access the list of development plan actions visible to you, navigate to **My Organization** **> Development Actions**. You will be able to see different columns available in the Development Actions tab, such as:

- Action Name
- Action Status
- Action Start / End Date
- Plan Type
- Plan Status

- Collaboration Status



Add Action to Plan

The supplier can add Actions to a development plan only if this permission is allowed in the associated plan.

Step-by-Step

1. Navigate to **My Organization** **> Development Actions**.
2. Click the "**Add Action to Plan**" button. **Note**: It is not possible to create an Action as there are no available Running Plans.
3. Complete the details (Action Name, Action Scope, Plan, Expected Duration).
4. Once the Action details are completed, click the **Save** button.

Respond to an Action Collaboration Form

The supplier super user (main user) or a user who is invited as a collaborator (invited as action collaborator), may be requested to complete an action collaboration form on a development plan from a notification sent to their email address. They can access surveys through a link in the email notification, dashboard or by logging into the application.

Step-by-Step

1. Access the Action Collaboration form using one of these options:

   Via Email

   a. In your email provider, find the email that contains "Collaboration Opened for Action [name] On: [organization platform]".

b. Click on the **link** at the bottom of the email. Enter your supplier user login credentials and click on the **Submit** button. You are taken to the **Collaboration Area** page in the application. A list of questions that have been made available to the supplier are displayed.

From the Dashboard

a. Enter your supplier user login credentials and click **Submit** button to open the application.

b. Navigate to **Dashboard** **> Received Action Collaborations.**

c. Click the **Action Name**.

From the Application

a. Enter your supplier user login credentials and click **Submit** button to open the application.

b. Navigate to **My Organization** **> Development Actions**.

c. Select the **Action Title** with the collaboration status **Open to Supplier**.

2. On the Collaboration Area, access the "Collaboration Form".

3. Click the **Edit Values** link, respond to questions then click the **Save** button.

4. Once you completed and saved the form, click the **Complete Collaboration** button (located on top of the page) then confirm the completion.

Receive and Send Messages as Supplier

A supplier's main contact will receive an email when a message is sent to the supplier from an action plan. They can use a link in the email to open the email and reply to it from the application. The reply is displayed on the Messages tab on the action plan.

Step-by-Step

1. In your email provider, find the email that contains "New Message Received for Action [name] on: [organization platform]".

> **Note**: Only the Subject of the message is visible in this email. You will not be able to read the message itself until you sign into your supplier user account and access it within the platform. The action must be visible to the supplier.

2. Click on the **link** at the bottom of the email.

3. Enter your Login Credentials and click the **Submit** button. You will be directed to the Collaboration Area tab.

4. Navigate to **"Messages" tab > Received Messages > Access the Message**. You can now see the body of the email message.

5. View the range of actions available to you within the Messages toolbar:
    - **Back** - Return to the Received Messages list.
    - **Reply** - Reply to this message using the secure online messaging system.
    - **Print** - Print the contents of the current page.
6. Click **Reply** to begin drafting your response to the message. You will now be in the Create Message page and the Subject line is already filled in, similar to a standard email. The message from the buyer is also displayed.
7. Enter the **Comment** you want to send in the **My Message** field.
8. Click **Send Message**.