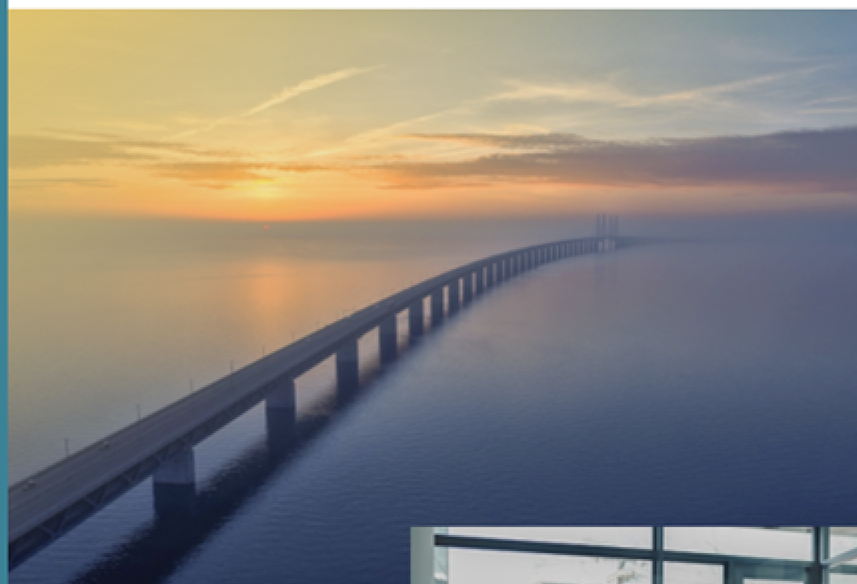

Advanced Sourcing Optimizer

Supplier Guide

Handbook for Supplier Users

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About This Guide

The Supplier help covers the features in Advanced Sourcing Optimizer you will use to successfully submit your bid information. Additionally, this help covers how to get assistance, including details on the available reference materials and support materials available within the Support center.

Each ASO sourcing event is configured by the buying organization to meet their unique specifications. As a result, the features available in a single bidding event may not include all of the bidding features covered in this guide.

The structure of this help follows the standard bidding process within ASO which consists of four basic steps: Registration, Pre-Bid Requirements, Bidding, and Receipts & Results.

Access Product Release Library

The JAGGAER Product Release Library (PRL) is where customers and suppliers go to see the latest information about releases such as the release timeline, release notes and videos. The library also contains information about recommended browsers, the Cloud Report and other helpful information.

https://library.jaggaer.com/

Effective October 18, 2021, the following credentials are required to access the PRL:

- **Username:** jaggaerlibrary
- **Password:** 5ba49c38

Advanced Sourcing Optimizer Basics

ASO is a web application that coordinates the buying activities of one or more sourcing event participants over the Internet. To use ASO, you need to have access to a computer with an Internet connection. For the best system performance, a high-speed Internet connection is recommended. Supported browsers include the latest versions of Chrome, Firefox, Safari, and Microsoft Edge. Other Internet browsers are not officially supported by ASO.

This section describes the standard interactions with the system. However, before you can bid in ASO, you will need to get invited to a sourcing event and complete the registration process.

Registration, Pre-Bid Requirements and Expressive Bidding Chapters can be found in the next section of this guide.

How to Log In and Log Out of ASO

You will first receive a registration email from ASO, inviting you to participate in the sourcing event. After completing the registration process, you will receive a registration approval email message containing a web address to be used to access the event.

1. Open a supported browser.
2. Click on the URL in the registration approval email OR copy and paste the URL in the address bar of the browser, and press Enter. The buyer code is specific to an individual Buyer organization in the registration email.
3. The login screen displays in your browser window.
4. On the Login screen, enter your e-mail address in the **Username** field. Your username for ASO is the email address that was entered during registration.
5. In the **Password** field, enter your password. If you have forgotten your password, select the Forgot Password link. The Password screen displays. Find instructions to obtain a forgotten password in the section: **How to Reset Forgotten Password**.
6. Click the **Login** button. The Events List screen displays. You are now logged into the system.

How to Access Sourcing Events

You can access the Event List screen at any time from the application menu sidebar.

The Event List page displays all events for the Buyer Company that you have permission to access. This screen also identifies the event and bidding type as highlighted below.

On the Event List page, click the event name for the desired sourcing event. The Supplier Home Page for the event is displayed.

The Supplier Home page contains important event information provided by the Buyer. The Home page includes Information / Alerts, Pre-Bid Tasks, Bidding Tasks, Receipts, and Supplier Support information.

How to Change your Password

Best practice suggests that user passwords should be changed on a regular basis to ensure information security. You can change your password at any time using the **Account Settings** link in the application menu sidebar.

If you change your user name for the event, you must change your password as well. User names must be a valid email address.

1. From the user icon in the top-right, select **Account Settings**. The Account Management screen displays. The system pre-populates the Account Information form with your User Name (usually set to your email address) and your Full Name. You should use your corporate email address as your user name.
2. Enter a new password in the **Password** field. Your password must contain between 10 and 50 characters, and it must contain at least one number, one special character, one lowercase letter, and one uppercase letter. It is case-sensitive. Your password should neither contain a common dictionary word nor your full name. You cannot reuse the same password within 365 days.
3. Repeat the password in the **Confirm Password** field. You must re-enter the new password exactly as entered in the **Password** field.
4. Select the **Save Account Information** button. Your new password is saved, and you are provided with a confirmation message on the Account Management page.
5. If you have stored your password on the login screen, log out of ASO and change the stored password at the login screen.

How to Reset Forgotten Password

ASO can generate a temporary password and also allow you to enter a new password online if you have forgotten which password you used for access to the event.

If you choose to enter a new password online, you will be prompted to answer the security question prior to being permitted to enter the new password.

1. From the ASO login screen, select the **Forgot Password** link. The Forgot Password screen displays.
2. Enter your user name in the **User Name** field.
3. Complete the **I'm not a robot** CAPTCHA, then click one of the following:
    - Select the **Email me a New Password** button. The Password Sent screen displays a message indicating the email address where the temporary password was sent. You will receive an email message providing a link to enter the temporary password. The temporary password is good for one use only.
    - Select the **Change my Password Online** button. This option can only be used if you previously established a Security Question and Answer for your account. The Security Question screen displays with the Security Question and Answer fields.
4. If you chose to change your password online, enter your answer in the **Answer** field. Select the **Submit Answer** button.
5. When entering your new password, you must enter the same password in both the Password and Confirm Password fields. Your password must contain between 9 and 50 characters, it must contain at least one number, one lowercase letter, and one uppercase letter and it is case-sensitive. Your password should not contain a common dictionary word or your Full Name. You cannot re-use the same password within 365 days.

How to Get Assistance and Training

To get assistance using ASO, visit the Support center. The Support center is accessible by clicking the **Support** link from any page within ASO or the application menu sidebar.

The Support center provides a searchable library of help content covering all aspects of ASO, including topic-specific training videos and a Supplier Quick-Start Guide covering the bidding process. If you are unable to find the answer to your question in the Support center, you can submit a help ticket online or find contact information for support.

How to View On-Screen Help

In addition to the Support center, ASO also includes page-level help information. Clicking the **Help** button, available on most application pages, displays screen-specific help for the current page of ASO.

To view help for a particular page of ASO:

1. Click the **Help** button in the top right of the page. A pop-up window opens displaying help information for that screen.
2. Review the page-level help in the pop-up window.

Note: The help text window will not open if you have enabled a pop-up blocker for your browser. Either turn off the pop-up blocker or include the website name in the list of allowable sites.

Clicking the **About** link, located in the application menu sidebar, displays information concerning your current user role, the event you are accessing, and the version of ASO in use. This information is often valuable to our support staff when assisting you with an issue.

How to Use ASO Reports

ASO contains a number of different reports; each report shares a set of common features that allow for modifying the view of the data on the screen. Additionally, all ASO reports can be downloaded to either MS Excel or .CSV formats.

The following options are available for each report:

- Select Records per Page
- Filter & Sort Data
- Download Report to Excel or .CSV

Records per Page Selector

Sometimes, a report contains more rows than can be displayed on one single page. When this occurs, ASO organizes the report so that a defined number of rows are displayed on one page. The pagination controls are displayed at the top right corner of each report.

Filter & Sort Data

Filtering removes information from a report thereby showing only that information most pertinent to you. You may choose to apply any combination of available filters for a report. Filters work together so if you enter or select a value in two filter fields, only the records matching both criteria will be displayed in the report.

Sorting arranges the information in a report in ascending or descending order based on a selected column. To enable sort, click on the arrow column header and select either “Sort Ascending” or “Sort Descending”.

Download Report to Excel or .CSV

Each report in ASO can be downloaded into either MS Excel and/or CSV formats. Depending on the size of the report, the report download may take up to several minutes. These options are found under the View menu in each report.

How to Request to Add New Contacts to an Event

Sometimes companies identify a Sales representative or a Purchasing contact as the ASO user, but the person who will actually submit bids is a Pricing person. Or, one company may want to have multiple users working together with ASO, submitting bids at the same time. An approved contact can request to have additional contacts added for the event.

To add new contacts to an event, Support requires the request in writing from an existing supplier contact. The approved contact should follow the steps below to submit a request

1. Navigate to the Support center, which can be accessed by clicking user icon in the top-right and selecting **Support**.
2. Submit a Support Ticket. Within the support ticket provide:
    - The name of the sourcing event exactly as it appears in the upper left hand corner of ASO
    - The names and email addresses of any new contacts required.
3. Submit the Support Ticket.
4. A Support representative will add the new contacts to the sourcing event. New contacts will receive an email invitation message and will need to follow the registration process to gain access to the sourcing event.

Chapter 1 – Advanced Sourcing Optimizer Registration

For each ASO sourcing event, you are required to complete a short registration process. The registration process verifies your email address and contact information. It also contains the Terms and Conditions for using the online system. During the registration process you will also set or verify your password and security question and answer.

How to Register for an Event

Supplier contacts receive an invitation email to register for each sourcing event. The invitation contains a registration code and a registration URL.

1. Open and read the email message. The message contains instructions on how to register for the ASO event.
2. Select the registration URL link in your invitation email message to open the Event Registration screen. The Event Registration screen displays in a browser window.

   If the browser window does not open when you select the registration URL link in the email message, copy and paste the URL into your Internet browser's address bar and press Enter.

   In some cases, you may be taken to an event registration page. If this happens:

   a. Locate the registration code in the e-mail that you received and copy it.
   b. Enter the registration code provided in the email message. Be sure to enter the code using upper and lower case letters exactly as it was entered in the email message. All registration codes are case sensitive. For best results, you should copy and paste all characters in the registration code from your email message into the input region.
   c. Select the **Submit Registration Code** button.
3. Ensure all information in the Participant Information screen is accurate.
4. Select the **Submit Participant Information** button. The Event Registration - Terms and Conditions screen displays.
5. Optionally, select the link at the bottom of the Terms and Conditions screen to open a printable version of the agreement.
6. Select the **I Accept** button to accept the Terms and Conditions agreement.
7. In the Event Registration - User Password screen, enter the password to be used for the event.
8. Select a Security Question and set the Security Question Answer.
9. Select the **Save Password** button.

Chapter 2 - Pre-Bid Requirements

Pre-bid Requisition Prior to bidding, a Buyer may require the Suppliers to complete some pre-bid requirements, also known as gating requirements. These requirements may consist of any combination of the following: required document downloads; agreement to a written statement; or request for information (RFI) completion. The exact gating requirements for each sourcing event are specified by the buyer.

How to Complete Pre-Bid Requirements

Review the Home page contents in their entirety to determine if there are any Pre-Bid Requirements to complete. The Home page is configured by the buying organization; however, most buyer teams include information about Pre-Bid Requirements on the home page.

1. If your event is configured for statement gating, there will be a gating statement provided by the Buyer visible in the Pre-Bid Tasks section of the Home page.

   a. Select the **Complete Gating** link located in the Actions column next to Statement Gating. A pop-up box will appear including the required statement.

   b. Select the check box next to the statement to indicate that you agree with the statement.

   c. Select the **Submit** button. Your acceptance of this statement is stored in the event. A check mark displays next to the statement. You will not need to accept this statement again to bid in the event.

2. If your event is configured for document gating, a list of documents will be displayed within the Pre-Bid Tasks section of the Home page. You will need to download each document and agree to a statement indicating that you have read the information contained within the documents.

   a. Select the **Download** link next to each document name.

   b. Read and optionally, save or print the document.

   c. Close the window containing the document. A check mark displays in the download column of the Document table along with the date and time the document was downloaded.

   d. Select the check box indicating that you have read the document(s). The check box used with the Submit button does not display until all documents have been downloaded.

e. Select the **Submit** button.

f. If all documents have been read, event gating is complete.

How to Complete an RFI Online

As part of the bidding process, a Buyer may require each participating Supplier company to complete a Request for Information (RFI). RFI responses can either be entered online using the wizard or offline using Excel. In some cases, the Buyer may require you to complete the RFI as part of the pre-bid requirements. When this is the case, you will not be able to access any gated area (i.e. Bid Builder) until you have completed the RFI.

To complete the RFI online:

1. Click on the **RFI** option from the **Expressive Bids** menu and the Supplier RFI Response Wizard screen displays.

   Review the options for completing your RFI response along with any event-specific instructions provided by the Buyer. Buyer instructions are included in the introduction section highlighted in the image above.

2. Click **Next** after you have reviewed the Instructions.
3. The RFI may contain multiple pages and sections to group RFI questions. Required questions are displayed in bold and marked with an asterisk. Enter a response for each required question and other questions as applicable.
4. Optionally, click the **Show Comments** link to display the comments box. In some sourcing events, the Buyer may provide you with an opportunity to enter Comments for yes-no and select-one questions.
5. Once you have responded to all of the questions on each page, review your answers on the confirmation page. Click on the **Confirm** button.

How to Complete an RFI Offline using Excel RFI Sheet

To complete the RFI Offline:

1. To respond to RFI questions using Microsoft Excel, click the **Download** icon from any page of the online RFI wizard.
2. In the Download RFI window, click the **Download RFI** button. The download process gathers all RFI questions, saves it into a Microsoft Excel spreadsheet, and compresses the spreadsheet into a ZIP file.
3. Open the Excel file from the ZIP folder and save it to your computer.
4. Edit the Excel file to respond to the RFI questions. **Important:** Do not modify the columns or add new rows.

   The RFI Response Workbook is comprised of at least 3 worksheets:

   - The first worksheet provides detailed instructions for responding to RFI questions in the Excel file. Do not delete this worksheet as it may be helpful in completing your RFI response. This worksheet is labeled Instructions.
   - The second worksheet contains the event-specific introduction to the RFI provided by the Buyer. This worksheet is labeled Introduction.
   - Subsequent worksheets contain the RFI questions, and are labeled as Page 1, Page 2, etc. The appearance and configuration of these worksheets may vary, depending on buyer configuration.

     Typically, within the Page worksheets, each new section is highlighted with a blue background. The questions within each section will be listed in Column A. Required questions will be denoted with an asterisk.
5. Respond to each question in Column B. Question types include Text, Multi-line Text, Number, Percent, Yes-No, Select-one, and Multi-select. Some questions may allow additional comments, available in Column C.
6. Save the file to your computer and then select the **Upload (Excel Spreadsheet)** icon from any page of the online RFI wizard once you have completed the RFI Response Sheet.
7. Select the **Browse** button. An Upload File window opens. Use this window to locate and select the file. Select the **Open** button once your file is selected.
8. Select the **Upload** button. ASO uploads all RFI data from the file and replaces existing information if new responses were provided. The Confirmation screen is displayed with all of your RFI responses.
   - Successfully uploaded responses display in a green message box. The message includes the Page Number and the number of RFI Responses added, deleted, and/or changed as a result of the upload.
   - If the system discovers an error during the upload process, a list of the errors will be displayed in a yellow box.

9. Confirm your answers by clicking on the **Confirm** button. The buyer will be updated that you have completed the RFI and the RFI Receipt will be displayed with your confirmed answers.

Chapter 3 - Bidding

ASO allows Suppliers to create offers that go outside the bounds of normal line-item bidding. In addition to bidding on the desired item, a Supplier can bid expressively by:

- Bidding on non-price factors
- Bidding on “alternate items”
- Items that are slightly different than what the Buyer desires
- Items that are a replacement of the one the Buyer desires
- Bidding on sets of items that must be purchased together by the Buyer (Packages)
- Offering conditional pricing on a set of items if certain award conditions are met by the Buyer (Conditional Offers)
- Providing capacity information on sets of items (multi-item capacity) so that Suppliers do not over-extend themselves if awarded too much business.

Additionally, suppliers can:

- Upload documents that pertain to the entire collection of bids (i.e., Event Documents) such as Financial History, Certifications, etc.
- Upload documents and associate those with an individual bid (i.e., Bid Documents) to provide additional details about a bid

Note: Depending on buyer configuration, some events may require bidders to complete certain requirements for their proposals to be considered complete. Bids in incomplete offers may be removed from consideration. Bidders may also be required to indicate that they are submitting the bid round's final proposal by clicking the **Submit Completed Proposal** button on the home page.

How to Submit Line-Item Bids

Suppliers enter line-item bids into ASO online using the Bid Builder or offline using Microsoft Excel.

How to Add or Update Bids Using the Online Bid Builder

The Online Bid Builder provides a quick and easy way to enter or update bids via the internet. Like the Excel spreadsheet, the Online Bid Builder displays data for the individual items along with any bids you have already submitted.

Depending upon the event configuration, you may be able to enter multiple bids for each item, or you may delete existing bids – all while logged into the event. The Buyer determines the total number of bids able to be submitted for each item during event configuration. All bids entered online are saved and submitted from the screen. **Note:** You do not have to enter bids on each item.

Buyers can establish bid fields as conditionally required or conditionally restricted based on data in other fields. The Bid Builder displays details of conditionally required and restricted fields when buyers use these features. For conditionally restricted fields, no entry box is available when the condition is met.

Note: When buyers use configurable bid sheets, bidders cannot bid via the bid builder. When you navigate to the expressive bidding page, you will be presented with a read-only version of the page.

1. From the **Expressive Bids** menu, select **Bid Builder**. The Bid Builder screen displays.

   The following visual cues will help you immediately identify important information:

Field Type	Value
Informational	• Bold
Required	• Bold • Asterisk
Optional	• Bold-Italic

   Additionally, in E-Auction events, the time until event open will display in a countdown timer on the bottom of the screen in red. When the event opens, the countdown timer will display time to close in green. The countdown timer is an optional feature in RFX events which may or may not be visible based on the buyer’s choice.

2. Optionally, use the Filters to constrain the number of items displayed. You will find entering bids to be an easier task if you use the filters to select smaller groups of items.

3. Enter bid values for one or more items. You can enter one or more bids for each item. The number of bids accepted is configured by the Buyer in RFX events.

   When entering price, you can enter commas and periods as needed, but should exclude any monetary symbols such as dollar signs. Use periods to separate the integer portion of your entry from its decimal part and commas to separate multiples of thousands in the integer part.

4. Optionally, enter the line-item capacity for the bid. The line-item capacity (bid capacity) indicates the quantity that the supplier can provide for that single bid on that particular item. Sometimes the buyer will assume that the supplier can supply all the quantity desired and therefore does not ask for the supplier to enter the line-item capacity.

5. Optionally, enter an on-Spec bid. If the buyer has configured the item to have an on-spec bid, then it will be listed in the first bid for an item. An on-spec bid is a bid that has some of the bid fields pre-selected by the buyer and cannot be changed by the supplier. When you enter an on-Spec bid, you complete only the bid fields that still have input fields available.

6. Optionally, enter an alternate bid. Alternates are additional bids for a single item. The number of allowable alternates is configured by the Buyer. Alternates are usually entered in the bidding columns identified with the field headings Bid 2, Bid 3, etc. Alternate bids require that at least one of the bid fields differs from the other bids on the same item.

7. Optionally, associate a Bid Document with a bid. If the Buyer has configured the event to accept a file attached to a bid, then you can upload and associate Bid Documents with your bids.You can associate only one Bid Document file per bid field per bid. However, you can associate multiple Bid Document files if those files are contained within a single ZIP file.

   a. In the Bid File row, click the Select button. The Select Document screen displays with a list of available documents.

   b. If the Buyer associated a Spec Bid Document with the bid, it will be the first one in the list. Use the Go button, when visible, to view additional pages of documents.

   c. If your file is not present to select, upload a new bid file by clicking on the **upload and select a new document** link. The bid file is not uploaded or associated until you click the **Update Bids** buttons.

   d. Click the **Select** button next to the Bid Document to be added.

   e. The Bid Document is associated with the bid and the Select Document screen closes.

   f. Select the **Update Bids** button.

   g. Save all values entered on one page before advancing to the next bid page. Failure to save the values will result in a loss of your bid information.

8. The Auction Lots feature allows buyers to collect bids for individual auction items, and then award the items in lots based on the best overall price for the lot. If the buyer is using auction lots, you will still see and bid on individual items. However, you will also see lot bid information (lot price and lot feedback). Lot bid information updates as you bid on items.

9. Review on screen validation error messages to identify any bid entry errors that need to be corrected. Bid fields with incorrect values will be highlighted in red. This is explained in How to Correct Bid Sheet Errors. However, if you navigate away from the Bid Builder, entry errors will no longer display in the Bid Builder.

How to Bid Offline Using the Excel Bid Sheet

You can download Bid Builder information into an Excel Bid Sheet for use offline. When you download the Bid Sheet, it will be pre-populated with any bid information that has already been submitted. After saving the file to your computer, you can now edit the individual bids, delete bids, and add new bids while disconnected from the Internet. Once you have completed bidding within the Excel file, save the file to your computer and then log back into ASO to upload the Bid Sheet.

Do not modify the structure of the Excel Bid Sheet. Changing the sort order of the data, deleting columns, and renaming worksheets are examples of structure modification that will result in bid upload errors.

Buyers can establish bid fields as conditionally required or conditionally restricted based on data in other fields. The Bid Builder displays details of conditionally required and restricted fields when buyers use these features. Suppliers will be notified of errors when uploading a bid sheet that contains data in restricted bid fields or lacks data in required fields.

Bid Using the Excel Bid Sheet

1. From the Expressive Bids menu, select **Bid Builder**.

2. Select the **Download Bid Sheet (Excel Spreadsheet)** icon. The Download Bid Sheet dialog displays.

3. Click the **Download Bid Sheet** button. The download process gathers all bid information, saves it into a Microsoft Excel spreadsheet, and compresses the spreadsheet into a ZIP file.

4. Extract the Excel file from the ZIP folder and save it to your computer.

5. The Bid Sheet is comprised of at least 2 worksheets:
    - The first worksheet provides detailed instructions for editing the bid information in the Excel file. Do not delete this worksheet as it may be helpful when completing the Bid Sheet. This worksheet is labeled Instructions.
    - The second worksheet contains the items that are put out for bid and is pre-populated with any bids that you have already placed. This sheet by default is labeled General, but the Buyer can change this name to reflect the classification of items being purchased.
    - If the Buyer has configured the event to contain different types or classifications of items, you may have additional worksheets for each item classification.

    Update the Excel file to edit or add bid information for the items.

    Do not edit columns containing informational data. You may enter multiple bids per item in the file If the buyer has configured multiple bids.

    - If the Buyer has configured the event to collect a bid document for each bid placed, then you will also see a sheet containing all the bid documents available to associate with your individual item bids. This sheet, if present, will be labeled Bid Documents. For bid documents to show in the Excel Bid Sheet they must first be uploaded in the Bid Documents area within ASO.
    - If the buyer has configured the event to collect a bid document and they have also provided an “on specification” document for this bid document, there will be another sheet containing these documents. This sheet, if present, will be labeled Spec Bid Documents and is for reference only.

    Item fields, required bid fields, and optional bid fields are visually differentiated using background color and asterisks. These formatting conventions are applied to both the header and to the actual value in the Excel workbook as follows:

    - Important Information - Bold text
    - Required Information - Bold text, gold header row, asterisk.
    - Optional Information - Italic text

6. To enter new bid information, enter all required values in each of the bid columns.

    - Generally, one bid requires multiple columns of information. Keep in mind that each row of the bidding spreadsheet represents one item available for bidding.
    - Use Microsoft Excel’s Freeze Panes feature to lock the columns containing informational data and speed up your time to enter bids.
    - Use Microsoft Excel’s AutoFilter command to view a specific subset of the total item data in the bidding spreadsheet.

7. To delete a previously submitted bid, enter the word DELETE in the Bid # - Delete column. Removing existing information in the spreadsheet has no impact on previously saved bid information.

   If you need help entering information in a column, hover your mouse over the column heading to review the requirements for the column.

   For some fields you cannot view the comments. In these cases, you will need to refer to the Reference documents for information.

8. To associate a Bid Document with a bid, enter the name of the Bid Document in the related column: Bid # - Field Name. Copy the document name from the Bid Documents tab or Spec Bid Documents tab to ensure you are recording the exact name of the document.

9. Save the Excel file. You can change the file name to make the file easy to identify in your computer folder. You can also compress the file using WinZip to speed the upload time. ASO will accept bid files with either a .xls or .xlsx extension.

10. From the **Expressive Bids** menu, select the **Bid Builder** command and click the **upload Bid Sheet** icon. The Upload Bid Sheet icon will not be available in an E-Auction event when there is less than 10 minutes remaining.

11. On the Upload Bid Sheet window, browse for your saved file and select the **Upload** command.

    ASO uploads all bid data from the file and replaces the prior information for the items where you provided new data. Supplier uploads are processed by ASO in one of two ways depending on the event type.

    - **RFX Events** – Supplier bid sheet uploads submitted in an RFX event are queued and processed by order of submission. Users can navigate to other pages while the upload is in progress. Icons in the upper right hand corner of your screen provide real-time information about the status of your file upload.
    - **E-Auction Events** – Supplier bid sheet uploads are processed in real time. Users cannot navigate away from the upload page while the upload is in process. Wait for upload completion and verify success using status messages.

    Successfully uploaded bids display in a green message box. The message includes the Item Class name and the number of bids added, deleted, and/or changed as a result of the upload.

    If the system discovers an error during the upload process, a summary report will open in the Detailed Error Report screen.

    You can find more information about correcting errors in the section How to Correct Bid Sheet Errors.

Ensure your information was submitted appropriately by viewing the Bid Receipt.

Bid Using Bid Templates

If using configurable bid sheets for an event, buyers create and configure new tabs on a bid sheet template for capturing supplier data. Bidders populate values in the additional tabs configured by the buyer.

If configurable bid sheets are used for an event, you will be unable to bid via the online bid builder.

You will work with a Bid Template Excel file rather than Bid Sheet file.

How to Correct Bid Sheet Errors

After submitting surrogate bids online, the Detailed Error report may display indicating that the Excel sheet contains invalid information. This report is only available in RFX events.

The Detailed Error report lists the number of valid bids and invalid bids. From the Detailed Error Report screen, you may view the report online, download the report to Excel, or download a new Excel sheet containing highlighted errors.

1. Upload the Excel sheet containing all bids. If the Excel sheet contains invalid information, a summary report appears, displaying the number of valid bids and the number of invalid bids.
   The summary report contains the following options:
    - View a Bid Sheet Upload Error Report online
    - Download an Errors – Only Bid Sheet
2. View the Bid Sheet Upload Error Report online. The Bid Sheet Upload Error Report contains the following information for each error:
    - The Bid number containing the error
    - The Bid round of the bid in error
    - The Item ID of the bid in error
    - The Item Class of the bid in error
    - The Excel row number that the error is on
    - The Column name that contains the error
    - A warning message that can help you fix the error
    - The original input (if any) that generated the error

Additionally, the Bid Sheet Upload Error report, contains links to:

- Download a new Bid Sheet with only the Bids containing errors
- Upload a corrected Bid Sheet

3. Optionally, download the Bid Upload Error Report to Excel for reference.
4. Optionally, click the icon to download the Errors-Only Bid Sheet and save it to your computer
5. Review and correct each invalid bid field in the Errors – Only Bid Sheet (highlighted in red). You can verify the bid is correct as intended or make changes to the bid.
6. Navigate to Expressive Bids and select the **Bid Builder** command.
7. Click on the file upload icon and follow the steps to upload your Errors-Only Bid Sheet. A status message displays indicating the number of successful bids processed. Verify that all bidding errors have been corrected and there are no remaining errors to correct.

How to Confirm Invalid Bids

After Suppliers submit bids in an RFX event, the Buyer reviews the information to verify it meets the item requirements. If the bid information does not meet requirements, the Buyer can invalidate the bid.

In this case, when the Supplier logs back into the event, a message displays on the Supplier Home page indicating that a bid was invalidated and providing a link that, when selected, displays the Bid Builder screen. The invalidated bids are highlighted in the Bid Builder.

The Supplier must confirm the bid to change the bid status. The Supplier may wish to modify the bid first before indicating it is confirmed.

1. From the Supplier Home page, select the **edit, confirm, or delete your invalid bid** link in the Warning message. The Bid Builder screen displays with all invalidated bids highlighted.
2. Review each invalid bid. Verify the bid is correct as intended or make changes to the bid as displayed.
3. Select the check boxes for the bids in question and select **Confirm** from the Action drop-down menu.

How to Review Feedback

A buyer conducting a sourcing event using ASO has the option to provide a variety of feedback to you as a bidder throughout the course of the event. This feedback can come in two major forms depending on what the buyer decides to configure for their event.

- Overall Feedback
- Bid Field Feedback

You can view feedback provided by the Buyer in both the online Bid Builder as well as in the Excel Bid Sheet.

To view feedback when provided by the buyer, navigate to the **Expressive Bids** menu and select **Bid Builder**

The Bid Builder displays and shows any feedback currently available to you. Feedback may include overall feedback, and feedback for individual bid fields as configured by the buyer.

Note: Certain types of E-Auction events will always contain item-level feedback. Buyers can choose to configure additional levels of feedback as well.

RFX feedback is always configured by the buyer, and therefore can be turned on/off or reconfigured at any time.

When feedback is configured in a sourcing event, you will see a feedback area at the top of the online Bid Builder. The left-hand side of the feedback area will contain any overall feedback provided by the buyer. The right-hand side of the feedback area contains a Bid Feedback Guide that will explain the detailed bid field feedback provided by the buyer.

In instances where the buying team has decided to provide feedback on individual bid fields, this information will be visible within the online Bid Builder and the Excel bidding sheet. Feedback may not be present in every event and configuration choices made by the buyer will vary.

The Auction Lots feature allows buyers to collect bids for individual auction items, and then award the items in lots based on the best overall price for the lot. If the buyer is using auction lots, you will still see and bid on individual items. However, you will also see lot bid information (lot price and lot feedback). Lot bid information updates as you bid on items.

Bid Field Feedback

At a minimum, feedback in an E-Auction event will indicate whether a bid has been accepted or rejected. Additional types of feedback may include:

- Rank
- Percentage away from the target
- Bid supplier alias with price

Feedback may not be present in every event, and configuration choices made by the buyer will vary.

Suppliers have the option to control what feedback they see using the **View** menu on the Bid Builder:

- **Overall Feedback Visibility** – Turn overall feedback on or off by selecting the checkbox next to the Feedback: Overall label
- **Bid Level Feedback Visibility** – Turn bid level feedback on or off by selecting the checkbox next to the Feedback: Bid Level label
- **Which Items to Display** – Filter to specific items based on your feedback status. For example, you may wish to view only those line items where your bids were Not Competitive compared to the Target rate for the item. In E-Auction events you will also have additional options to display items with accepted, rejected, or pending bids.

If bid level feedback is currently displayed in the online Bid Builder, feedback will also be available in your downloaded Excel bid sheet.

Download a Bid Sheet to Review Feedback

1. Click on the **Download Bid Sheet** button

2. Follow the instructions on the Download Bid Sheet pop-up window, making sure to check the **Include feedback** radio button. Click the **Download Bid Sheet** button.

3. A zip file will be created with the Bid Sheet. You can either open the file to extract the sheet now or save the file to open it later.

4. If you open the sheet, you will find a workbook with the following tabs, depending on the buyer's configuration of feedback and event set-up:

    - **Instructions** – This tab contains instructions on the usage of the Excel bid file

    - **Feedback** – This tab contains the Overall Feedback that the buyer has provided to you along with the Bid Feedback Guide describing the Bid Field feedback.

    - **Bid tabs** – There may be one or more bid tabs depending upon the structure of the event that will vary in name depending upon event design. Bid field feedback will be displayed in these bid tabs in additional data columns after the value fields. The colors (red, yellow, green) are on the price field itself, but all other feedback has separate columns.

Important Notes About Feedback

- Feedback is not configured by the buyer in every sourcing event using ASO.
- Feedback terminology, the value used for bid field comparison purposes (defined in this guide as Target), and feedback timing during a sourcing event will vary with each event.
- For specific questions about feedback in an active sourcing event, review the welcome message on the Home page in ASO and refer to the Q&A section by navigating to Reference::Q&A. If the buyer has not provided adequate explanation of the feedback used for the event, submit a new Q&A to request further clarification.

How to Submit Conditional Offers

Suppliers can enter special pricing for items that is contingent upon certain Supplier-defined criteria being met by the Buyer. This special pricing is called a Conditional Offer.

Conditional offers can be very powerful to the Supplier; they allow the buyer to leverage your strategic advantages or build on the products or services you currently provide to the Buyer to gain additional business. Conditional offers can be contingent on an award of a specific unit volume or a specific spend volume.

Conditional Offers are only available in events where the buyer has enabled them.

How to Create a Conditional Offer

Conditional offers let Suppliers go outside the bounds of normal rigid bidding and be creative about how to propose incentives for the Buyer.

Example:

In a Temporary Labor sourcing event, if you want to leverage your incumbent business in Light Labor positions in order to get more business in Professional / Specialist positions, then you may want to propose the following:

Low Range	High Range	Discount
100,000	199,999	2%
200,000		3%

If I am awarded at least $100,000 of business in Professional / Specialist positions, then I will discount the Light Labor positions by 2%. If I am awarded at least $200,000 of business in Professional / Specialist positions, then I will discount the Light Labor positions by 3%.

Buyers can add Conditional Offers into the system on behalf of a Supplier.

Conditional Offers that overlap provide a greater benefit to the Buyer because their cumulative behavior awards a higher percentage or USD discount. ASO displays a message when overlapping offers are created.

To create a Conditional Offer:

1. From the **Expressive Bids** menu, select the **Conditional Offers** command.
2. Select the **Create Conditional Offer** link.
3. Enter a name for the Conditional Offer.
4. Select **Next Step**. The Step 2: Select Item(s) Trigger screen displays. The trigger screen allows you to select a set of items for which a condition must be met before the discount is available. You may either select All Items or a specific subset of items. If you select a subset of items, then you must select at least one of the criteria to limit the selection.
5. Select check boxes next to the Item(s) to use as triggers that will cause the Conditional Offer to go into effect.
6. Select **Next Step**. The Step 3: Select Item(s) in discount screen displays.
7. Select check boxes next to the Item(s) to which to apply the discount.
8. Select **Next Step**. The Step 4: Set Discount Schedule screen displays.
9. Enter a range of items or an award amount that must be purchased and a discount amount.
    - The options for the trigger conditions are either:
        - a currency amount or
        - a number of units
    - The discount that can be applied is either:
        - percent,
        - currency amount per unit, or
        - lump sum currency amount - If you select the lump sum, then the discount is evenly applied across all the items in the discount group.
10. Select the **Save** button. An on-screen confirmation displays to show that the Conditional Offer has been created successfully and you are back on Step 1. The status message will also indicate if your conditional offer overlaps with other offers.

How to Copy or Edit a Conditional Offer

1. From the Expressive Bids menu, select **Conditional Offers**.
2. Click the name of the offer to view the offer.
3. Click the **Copy** button. The offer is named "Copy of <original offer name>" by default, but can be updated.
4. Optionally, edit the conditional offer using the four steps on the Conditional Offer page.

How to Delete Conditional Offers

You can delete one or more Conditional Offers using the Action command from the Conditional Offer screen in ASO.

1. From the Expressive Bids menu select the **Conditional Offers** command.
2. Select one or more existing conditional offers. Using the checkbox in the Select All column, select the conditional offers you would like to delete.
3. From the Choose Action drop-down menu to the left, select the **Delete** command to delete the selected conditional offers.

How to Submit Package Offers

A Package is a group of items that a Supplier wants to offer to a Buyer at a special price. The Supplier still provides line-item pricing, but the pricing is valid for the items in the Package only if the Buyer purchases all items in the Package at the volumes indicated by the Supplier.

Packages are only available in RFX events when the buyer has enabled them.

Note: Packages are not available in E-Auction events.

How to Manage Packages

The Package Builder allows Suppliers to manage Packages easily while connected to ASO via the Internet.

1. From the **Expressive Bids** menu, select the **Package Builder** command. The Package Builder screen displays showing all Packages.
2. From the Package Management screen, select the **Create Package** link to create a new Package.
3. Optionally, select the **Create Folder** link to create a folder to organize your package offers.
4. Click the check box to select a Package in the table and perform an action on the Package using the **Select Action** drop-down menu.
5. Optionally, click the Package name link in the table to view Package details.

How to Create a Package Online

A Supplier can create and submit a Package offer or place bids on Packages created by the Buyer. A Package is evaluated by the Buyer and if it is awarded, all items within the Package are awarded together.

1. From the Expressive Bidding menu, select the **Package Builder** command. The Package Builder screen displays.
2. From the Package Builder screen, select the **Create Package** link. The Create Package screen displays. For events with multiple Item Classes, you will first need to select the Item Class.
3. Enter a Package name. Package names should be descriptive for you and Buyers who will be reviewing Package offers.
4. Optionally, set the status of the package. A package can be locked or unlock. A locked package may not be edited.
5. Optionally, add a comment about the Package.
6. Select the **OK** button to create the Package.

How to Add Items to a Package

After creating or copying a Package, you will then add items to the Package. Once the items are added, you will price the items in the package.

1. From the **Expressive Bidding** menu, select the **Package Builder** command. The Package Builder screen displays.
2. From the list of packages, click on the package name you want to view. The Package View screen displays.
3. Select the **Add Items to Package** link in the Actions bar in the left navigation. The Add Items to Package screen displays. The bottom of the screen displays a list of items available to add to the package.
4. Optionally, use the filters to reduce the number of items displayed in the table.
5. Select one or more items to be included in the Package by selecting the check box next to the item(s) in the table.

   The Buyer may choose to only allow the Supplier to enter items into a package after the Supplier has placed a bid on the item individually in the Bid Builder. If you want to add an item to a Package that does not have a checkbox, then place a line-item bid on that item using the Bid Builder or Excel bidding sheet and return to the **Add Items to Package** screen to add the item.
6. Click the **Add Selected Items to Package** button. ASO displays a message indicating the items were added successfully.

   All selected items are denoted with a solid green check mark in the table indicating they are part of the Package. Items Added Successfully
7. Optionally, select the **Add All Items in this Filter** button.

   If you used filters to display specific items in the list, use this command to include all items displayed in the table, as well as items selected on other pages of the filter, as a group instead of selecting each item individually and using the **Add Selected Items to Package** button.
8. Optionally, select the **View Items in Package** link. The Package Contents window opens showing all selected items in the Package. Close the Package Contents window to proceed.

After items are added to the package, you must then submit item pricing for each item in the Package. This step can be accomplished by adding the pricing manually or by importing pricing from individual bids or other Packages. You must have a bid on every item in the package for it to be considered complete.

How to Add Item Pricing to a Package

The next step to defining a Package is to add item pricing. Most items in a Package are generally priced lower than the price charged for the item when purchased individually.

ASO provides three methods to enter Package pricing. This section describes how to enter prices manually. Find instructions on the other pricing mechanisms in subsequent sections of this chapter.

1. Select a Package from the Package Builder screen.
2. From the Actions menu, select the **Price** command to add prices to the items in the Package. The Package Price screen displays.
3. Enter bid values for all required fields and select the **Update Bids** button. A message displays indicating the number of bids added to the Package.
4. Optionally, lock the Package after adding pricing by selecting the **Lock** command from the Action menu.

How to Import Package Pricing from Individual Bids

ASO provides an automated way to price Packages by importing prices entered for individual items within Bid Builder entered by the Bidder on an individual item or another Package or the Excel bid sheet.

1. From the **Expressive Bids** menu, select the **Package Builder** command and select a Package.
2. From the View the <Package name> Package screen, select the **Import Pricing** command. The Import Pricing screen displays.
3. Optionally, select the **View Items in Package** link. A Package Contents window opens displaying the details for all items within the selected Package. You can use the information in this window to help you make decisions with importing pricing.
4. In the Import Pricing from drop-down menu, select **Individual Bids**. This selection imports the individual line item pricing from the Bid Builder or Excel Bid sheet.

5. Identify which bids should be imported. This option is available when items can have multiple bids. When importing pricing from individual bids, choose:

    - A bid number (for example, always import Bid 2) to always import that specific bid for each item. If an item does not have a Bid 2, then no bid amount is imported for that item.
    - The First Existing Bid (the first bid placed and still existing for an item)
    - The Last Existing Bid (the last bid placed and still existing for an item).

    If no pricing has been placed on the individual items, the Bid number and Existing Bid options are unavailable.

6. Optionally, determine what action should be taken with existing pricing. You will only see this option if you already priced items within the package. You can choose to:

    - Import pricing for all items in the Package, overwriting any existing pricing for the items in the Package.
    - Import pricing for all items in the Package, importing only the pricing for items that do not already have a price in the Package.
    - View the conflicts and choose the action to be taken.

    If no pricing has been placed on individual Bids, these options are unavailable.

7. Identify discounts or price increases to be calculated when the prices are imported into the Package.

    - Entering a positive number in the fields in this region provides a discount in price. For example, entering 20 provides a 20% discount.
    - Entering a negative number in the fields in this region provides an increase in price. For example, entering -5 increases the price by 5%.

8. Select the **Import Pricing** command. All individual bids are imported into the Package.

All items in a Package must have a price for the Package to be considered complete. Navigate to Expressive Bids and select the **Package Builder** command to view the completion status of all package offers. Only complete Packages are considered by the Buyer.

How to Import Package Pricing From an Existing Package

ASO provides an automated way to price Packages by importing price values you entered for other Packages.

1. From the **Expressive Bids** menu, select the **Package Builder** command and select a Package name in the package list.
2. From the View Package screen, select the Import Pricing command. The Import Pricing screen displays.
3. In the Import Pricing from drop-down menu, select Another Package. The screen updates to display the fields to be used to import from the selected Package.
4. Identify which bids should be imported. When importing pricing from a Package, choose another Package that contains pricing information from the drop-down menu.
5. Determine what action should be taken with existing pricing. You can choose to:
    - Always overwrite existing pricing
    - Never overwrite existing pricing
    - View the conflicts and choose the action to be taken
6. Identify discounts or price increases to be calculated for each price field when the prices are imported. Remember that positive entries indicate a price discount from prices in the original package while negative entries indicate an increase from prices in the original package.
7. Select the **Import Pricing** button to add pricing to the Package.

How to Copy a Package

You can also create a new Package by copying an existing Package and then making modifications. The changes you make in the copied Package do not affect the original Package.

1. From the Package Builder screen, select the name of the Package to be copied.
2. From the Action table on this screen, select the Copy command.
3. Enter a new Package name and select the OK button to create the Package. A copy of the original Package is created. If the original Package contained pricing, the pricing is included in the new Package.
4. Use the commands in the Action table to modify the Package details, including removing items from the Package, as necessary.

How to Create Packages Using the Excel Package Sheet

If the Buyer has configured the ability for Suppliers to create Packages using Excel, you can download Excel Package bidding sheets to enter Package information and then upload the information into ASO.

1. From the **Expressive Bids** menu, select the **Download Packages** command.
2. Choose the type of Excel spreadsheet to be created. You can choose from:
   - Blank File - A blank file does not contain any previously created Packages, including any Packages defined by the Buyer. A blank file can be used to name and define one or more Packages.
   - All Packages - This file contains the information for all Packages that have been previously created by the Supplier, as well as all Packages created by the Buyer.
3. Select the **Download Package Bidding Sheet (Excel Spreadsheet)** command. The Excel spreadsheet is downloaded to a location that you identify on your computer. The file is stored as a compressed ZIP file. The Package Sheet may contain up to four worksheets:
   - Instructions – contains instructions on how to complete the package sheet. Do not delete this worksheet.
   - Item Data - contains a listing of all the items that are out for bid. You will use the Item ID value to enter the bids on the Submit Packages worksheet.
   - Submit Packages – contains columns of data for each package. If you have selected to download the existing packages, then those will be listed first, along with additional columns to define new package offers.
   - Bid Documents – if the Buyer has configured the event to collect a bid file, then the list of all bid Documents is available for your reference.
4. Edit the Excel file to add new Packages or to change Package pricing for existing Package offers. Do not modify the structure of the Excel file in any way if you intend to upload information using the file.
5. In the third tab called Submit Packages, Enter a name for the Package in Row 2 in the cell immediately above the Package pricing information. The name entered is used to identify the Package when the information is uploaded. A Package name must be defined to create a package offline in the Excel sheet.
6. Enter an X in the first column of a package to include that item in the package. Refer to the Item Data tab to view item details for each Item ID listed in the Submit packages tab.

7. Optionally, remove the existing X from the first column of the bidding area to remove an item from the package.
8. Provide required price information for all items to be included in the Package. The Package will not be uploaded if it contains missing pricing for an item.
9. Save the Excel file with your changes.

How to Upload an Excel Package Sheet

1. From the **Expressive Bids** menu, select the **Upload Packages** command. The Upload Packages screen displays.
2. Select the **Browse** button to locate your Package file.
3. Choose whether to save the Package in a specified folder within ASO.
4. Determine what action should be taken with an existing Package of the same name. The Supplier can choose to:
   - Overwrite the existing Package - All pricing in the existing Package with the exact same name will be overwritten with the pricing in the Package being uploaded.
   - Rename the uploaded Package - The Package with the conflicting name will be given the name entered in the input region to the right of this selection. For your convenience, ASO pre-populates the name with a date and time stamp.
   - Skip - The Package having a conflicting name in the uploaded file is ignored.
5. Click the **Upload** button.
6. After the upload has processed completely, review the status message carefully to ensure all Package information was entered correctly. Validation errors during the upload process will be noted within the status message and must be corrected within the Excel Package bidding sheet and then re-uploaded.

How to Submit Capacity Across Items

Capacity Across Items is a mechanism for the Suppliers to protect themselves from over-commitment. Suppliers can place aggressive bids at the item-level, but then tell the Buyer that they cannot get more than a certain amount of business overall. This capacity entry is different than capacity entered at the item level within Bid Builder or the Excel bidding sheet because it applies at a higher level defined by the Buyer while item level capacity only applies to the individual item. Note that Capacity Across Items is not collected by the Buying team in every sourcing event.

Note: E-Auction events may collect capacity at the item-level on the Bid Builder; however, this higher level capacity entry is not enabled in e-Auction events.

How to Submit Capacity Across Items Amounts

1. From the **Expressive Bids** menu, select the **Capacity Across Items** command. The Capacity Across Items screen displays.
2. Select the method to use to enter capacity amounts. Select a collection method in the **Enter Capacity By** section at the top of the screen.
3. Enter the capacity information in the input region of the table. Carefully review the instructions on the screen to identify whether capacity entries should be for Weekly, Monthly, or Annual durations.
4. Select the **Submit** button.
5. If multiple capacity entry methods have been defined by the Buyer, you will see multiple options within the Enter Capacity By selection box. Entries are required for each capacity collection method defined by the Buyer.

How to Submit Capacity Across Items Using the Excel Capacity Sheet

1. From the **Expressive Bids** menu select the **Capacity Across Items** command. The Capacity screen displays.
2. If available, select the **Spreadsheet Download/Upload** link in the Enter Capacity By section of the screen. The Capacity screen refreshes displaying the instructions to download (and upload) the Capacity Sheet.
3. Select the **Download Capacity Across Items Sheet (Excel Spreadsheet)** command and save the file to your computer.

4. Edit the Excel file to enter new capacity information or to change capacity information entered previously.
   Note: Do not modify the structure of the Excel file in any way if you intend to upload information using the file.
5. Enter capacity information for each entry on the worksheet pages. The Capacity entry column is located to the far right on the spreadsheet. Any capacity amounts entered into the spreadsheet overwrite the existing capacities saved in the system.
6. When finished entering capacity information, select the **Capacity Across Items** command from the **Expressive Bidding** menu.
7. Select the **Spreadsheet Download/Upload** link.
8. The Capacity screen refreshes displaying the instructions to upload the Capacity Sheet.
9. Select the **Browse** button to locate your file.
10. Select the **Upload** button.

The capacity file is uploaded. Carefully review upload status messages to ensure all capacity entries were uploaded completely. Errors during the upload process will be identified in the upload status message at the top of the screen.

How to Submit Bid Documents

Depending upon how the Buyer has configured the sourcing event, Suppliers may be able to upload documents to support an individual bid on an item. If the Buyer has configured the event to collect a file for each bid (e.g., an alternate item specification), then you can upload all the documents via a ZIP file in the Bid Documents area within Expressive Bidding and then associate them in the Bid Builder.

How to Upload Bid Documents

Suppliers can upload Bid Documents to be used as supporting documentation for a bid. It is possible to upload files individually or as a group using a Zip file. Individual bid document files must not exceed 16MB.

1. From the **Expressive Bids** menu, select the **Bid Documents** command. The Bid Documents screen displays.
2. To add a new document, select the **add** button. A new row is added to the table.
3. In the Order and Name fields, enter the order number and name. If the Name field is left empty, the name defaults to the name of the uploaded file. The order is used to determine the order of display in the selection window in the Bid Builder. If this file is going to be used frequently, enter a low number to minimize scrolling in the selection window.
4. In the Document column, click the **Browse** button. A Choose file window displays.
5. Navigate to the file and select the **Open** button. The file location displays in the Document column.
6. If required, from the Attribute column, select a bid file attribute (field) from the drop-down menu. The Attribute field specifies which bid file field your file should be associated with.
7. Optionally, repeat steps 2-6 to add additional Bid Documents.
8. From the Bid Documents screen, select the **Save** button. The Bid Documents screen refreshes and the document upload confirmation message displays. Additionally, the # Bids, Last Modified By, and Last Modified columns automatically populate.
9. Optionally, extract the files from the ZIP file. You may want to leave the files in the ZIP file if you intend to associate the entire contents of the file to a bid.
   a. Select the check box for the row containing the ZIP file. A check mark displays in the check box.
   b. From the Choose Action drop-down menu, select the **Extract** command.
   c. Confirm the extraction. A window displays requesting confirmation to extract the files.
   d. Select the **OK** button. The Bid Document screen refreshes and a confirmation message displays. Additionally, the extracted files display in the table. The Bid Documents are assigned using the order number assigned to the Zip file.

You are now ready to associate Bid Documents to bids using the Online Bid Builder or using the Excel Bid Sheet.

How to Manage Bid Documents

After uploading Bid Documents, you can replace a file, change the display order, delete documents, un-associate a document from a bid, or download documents.

Additionally, you can view the “Spec Bid Documents” that the Buyer uploaded. Spec Bid Documents provide specification details for the items included in the sourcing event. Spec Bid Documents may not be changed by a Supplier, but can be reused in your own bids.

1. From the **Expressive Bids** menu, select the **Bid Documents** command. The Bid Documents screen displays.
2. Optionally, you can replace an existing Bid Document.
   a. Select the replace link in the row containing the document to be replaced.
   b. Click the Browse button, navigate to the selected file, and click Open.
   c. Click the Save button.
3. Optionally, you can change the order of your documents in the file selection window within Bid Builder.
   a. In the Order column, enter a new order number.
   b. Click the Save button.
4. Optionally, you can unassociate documents from a bid. Unassociating a Bid Document means the document will be removed from any bids with which it was associated. The document will not be considered when the bid is evaluated.
   a. Select a check box in the row containing the desired document.
   b. From the **Choose Action** drop-down menu, select the **Unassociate Bids** command.
   c. A confirmation box displays.
   d. Click **OK**.
5. Optionally, you can delete a previously uploaded Bid Document. You cannot delete a bid document that is associated with a bid. You must first unassociate the document from the bid and then delete the bid document.
   a. Select a check box in the row containing the document to be deleted.
   b. From the Choose Action drop-down menu, select the **Delete** command. A confirmation box displays.
   c. Click **OK**. The document is removed from the list of Bid Documents.

How to View and Download Multiple Bid Documents

You can download multiple Bid Documents or Spec Bid Documents from the Bid Documents screen.

1. From the **Expressive Bids** menu, select the **Bid Documents** command. The Bid Documents screen displays.
2. Optionally, use the Links in the View selector box to navigate to the list of spec bid documents.
3. To download Bid Documents, in the All/None column, select the document you would like to download.
4. From the group actions selection box, choose **Download**. A prompt displays giving you the option of opening the file or saving it to open later.

How to Submit Bids Through The Auction Console

ASO buyers are able to monitor and administer auctions via the **Auction Console** interface, and ASO suppliers are able to submit bids in the interface.

The **Launch Auction Console** button is available to suppliers on the Supplier Home Page once they have completed gating requirements.

Buyers and suppliers are able to communicate directly from within the Auction Console using the **Chat** tab that appears in the lower right of the screen. Buyers have the ability to communicate with all suppliers, while suppliers are only able to communicate with the buyer, not with each other.

- Messages are still sent when the recipient is offline, and will appear when the user returns to the Auction Console.
- Group blast messages, sent by the buyer to all suppliers, are indicated with a megaphone icon in the chat window.
- To download your chat log with the buyer for an event, click the document icon in the chat tab. This will open a field where you can enter a file name for the download. Click the **Download** button and an Excel file containing your chat log will download.

Suppliers see three tabs in the **Auction Console**:

- The **Bidding** tab allows suppliers to submit bids for the auction.
- The **Bid History** tab allows suppliers to view a list of their submitted bids for the auction with sortable columns.
- The **Downloads** tab is where reports generated on the Bid History page are listed for download.

If buyers have chosen to show buyer information, a button will also appear on the auction console header that bidders can click to view buyer contact information.

Submit Bids Through Auction Console

1. Click the **Launch Auction Console** button on the Supplier Home Page. The button is only available once gating requirements are completed. The **Auction Console** opens.
2. Click the **Bidding** tab of the **Auction Console**.
3. Enter bid values for one or more items.
4. Click **Submit Bids**.

Chapter 4 – Receipts and Results

Receipts are reports that contain information about all bids submitted for a particular Supplier during the sourcing event. JAGGAER highly recommends that Suppliers download all receipts prior to the close of a bid round to ensure that all bids are accurate. Receipts can be downloaded into an Excel-formatted read-only file.

How to Review and Download Receipts

The Bid Receipt shows the results of all of your line level bids and Package Bids. You should review and download this report before the close of each bid round as a record of your final bid entries for the bid round. Other bidding receipts may be available within the sourcing event depending on Buyer configuration decisions. All available receipts will appear under the Receipts menu in the navigation bar.

1. To view the Bid Receipt, from the **Receipts** menu select **Bid Receipt**. The Bid Receipt screen displays.
2. Optionally, use the filters to expand or limit the amount of information displayed in the receipt.

3. Review your bid information carefully. The Bid Receipt shows all bids submitted, including bids that are part of a Package. The Package name is displayed in the report to indicate those bids that are part of a Package offer.

4. To find all bids for a Package, sort the report on the Package name

5. Optionally, select the **Detailed** view option from the View tab at the top of the report to expand the information visible in the table.

6. To download the receipt in Excel or CSV format, select the appropriate option from the View menu at the top of the online receipt report.

7. Optionally, review and download other available receipts. Additional receipts could include any of the following:
   - Capacity Receipt
   - Conditional Offers Receipt
   - RFI Receipt
   - Bid History
   - Bid Status
   - Results Receipt

How to View Results Information

Buyers may choose to communicate the results of their analysis using ASO. When Buyers use ASO to communicate their analysis results, they have the ability to send notification messages to both Suppliers who were included in those results and to Suppliers who were not included in those results. Remember that results are sent at the Buyer's discretion and they may choose to communicate their decision outside of ASO.

1. Buyers can choose to use ASO to communicate analysis results at the conclusion of a sourcing event. In this case, you will receive a results notification email directly from ASO.

2. The results email will include a note from the Buyer along with a link to view the results online in ASO.

3. Optionally, click the link within the results email to access the results receipt. You will be prompted to login to ASO first.

4. Alternatively, navigate to the Receipts menu in ASO and select Results.

5. Review the items in the results communicated to you by the Buyer. You may select either a Standard or Detailed view of the Results Receipt using the View menu at the top of the report.

6. Optionally, download a copy of the Results Receipt by selecting Export View to Excel from the View Menu.

Chapter 5 - Reference Materials and Notifications

Reference materials include read-only documents that the Buyer may have uploaded for reference during the bidding process along with Questions and Answers relevant to the sourcing event.

How to Review Event Documents

Typically Buyers use Event Documents in ASO as a way to provide a sample file (i.e., template) for Suppliers to download, complete offline, and then upload back into ASO. However, a Buyer may also use Event Documents as a way to request a file from a participating Supplier without providing a corresponding template. For example, a Buyer may provide a way for Suppliers to upload an Annual Report in Event Documents. Review any associated instructions provided by the Buyer to determine what specific actions are required for each Event Document request

1. To review a list of requested Event Documents for the sourcing event, from the **Expressive Bids** menu select **Event Documents**. Keep in mind that Event Documents are not included in all sourcing events.
2. Optionally, click on the Template name to download and save the template. Not all Event Documents include a corresponding template to download.
3. Upload a response for the Event Document request.
    - From the **Expressive Bids** menu, select the **Event Documents** command.
    - Click the Browse button corresponding to the correct Event Document.
    - Navigate to the location where the Event Document file resides on your computer, select the file, and click Open. The file now appears in the input box next to the Browse button.
    - To upload the file and associate it with the question, click the Update button. The Event Documents screen refreshes with a file upload status message.
4. Optionally, to download a document file you have already uploaded, click the file name.
5. Optionally, to delete the file, click on the remove link and click the **Update** button to save your changes.
6. Optionally, if you want to replace the file with a newer version, click the replace link.

How to Review Reference Documents

At the beginning of an event, you may be required to download, read, and acknowledge gating documents to gain access to the bidding screens of ASO. In some sourcing events, the Buyer may upload additional documents for reference during the bidding process. Reference Documents, whether they are included as part of gating or not, can be viewed and downloaded throughout the sourcing event. Unlike Event Documents, Reference Documents do not require a response and are for information only.

1. From the **Reference** menu, select the **Documents** command. The Reference Documents screen displays.
2. Select the **Download** link to open or save a document to your computer.

Depending upon the type of document, either a new browser window opens displaying the contents of the document or a download dialog opens allowing you to save the document to your hard drive.

How to Review Questions and Answers (Q&A)

While you are participating in a sourcing event using ASO, you may have business questions. The Q&A feature allows you to review questions and responses submitted by all Suppliers participating in the sourcing event and submit new questions. The Q&A feature should only be used for business questions; technical support questions should be submitted in the Support center rather than through the Q&A feature. The Support center can be accessed by clicking the Support link from any page of ASO.

1. From the **Reference** menu, select the **Q&A** command. The Question and Answers screen displays.
2. Use the Filters to search for existing Questions and Answers or download the questions and answers to Excel. If you click on the Question name, an expanded view of the question and answer will appear.

How to Submit Questions & Answers (Q&A)

If you have business questions about the event and cannot find an answer by reviewing previously submitted questions, you can submit a new question to the Buyer. Keep in mind that technical support questions should be submitted in the Support center rather than through the Q&A feature. The Support center can be accessed by clicking the **Support** link from any page of ASO.

Your submitted questions always appear on the Questions and Answers area listing regardless of whether the Buyer has answered your question. Unanswered questions are indicated with an (unassigned) in the Section column and an Unanswered in the Answer column.

1. From the **Reference** menu, select the **Q&A** submenu.
2. Click on the Submit a Question link and the Submit a Question Dialog appears.
3. Enter your question into the Question field. Select the Ask Question button.
4. Your question now displays in the Questions and Answers listing for the Buyer to review.

Note: Once your question has been answered by the Buyer, an email will be sent to all contacts within your company and a new notification will appear in the Notifications section of the event.

How to Review Supplier Notifications

Throughout an event, Buyers have the ability to send notification messages to participating Suppliers. Notification messages are sent to the email associated with your ASO account.

Every notification message sent from ASO includes standard content to assist suppliers during the bidding process:

- Each notification message includes a link to view the message online within ASO.
- Notification messages include status information that provides high-level details about the status of your bid submission.
- Business Questions should be directed to the Q&A area of the application. Each notification message includes a link to access Q&A.
- Suppliers have access to comprehensive support information within the Support center.

To view notifications within ASO:

1. From any page within ASO, click the **Notifications** button in the top right corner of the page.
2. Review all messages in the Notifications inbox. New messages are displayed in bold.
3. Click the Subject of the message to review the details.
4. Review the online message content.
5. Optionally, click any embedded links in the message to access pages of the application highlighted by the Buyer in their message.
6. Optionally, click the attachment at the bottom of the message to download and view the file.

How to View and Download Item Documents

If the Buyer provides Item Documents for reference as part of their sourcing event, these documents can be downloaded in one of two places within ASO: either individually on the Bid Builder or in bulk by selecting the **Items** command under the Reference menu. To download documents in bulk:

1. From the **Reference** menu, select **Items**. The Reference Items screen displays.
2. Optionally, view and download an individual Item Document.
    a. Select the **Detailed** view of this report, by clicking on the Detailed option from the View menu at the top of the report table.
    b. In the Item Document column, click the file name for the desired document.
    c. The File Download dialog displays.
    d. Select **Open**.
    e. The Item Document displays.
3. To download multiple Item Document(s), select the check boxes corresponding to the documents you would like to download. Alternately, select **All** to choose all Item Documents.

    If you select **All** and the Item Documents report contains multiple pages, a link will display giving you the option to select all of the items on the page or in the report.
4. From the Actions menu, select the **Download Documents** command. A confirmation dialog

displays.

5. Select **OK**. The File Download dialog displays.
6. Select **Save**. If you chose to download multiple Item Documents, they are downloaded as a .ZIP file to the file location you specify.

Supplier Quick Start Guide

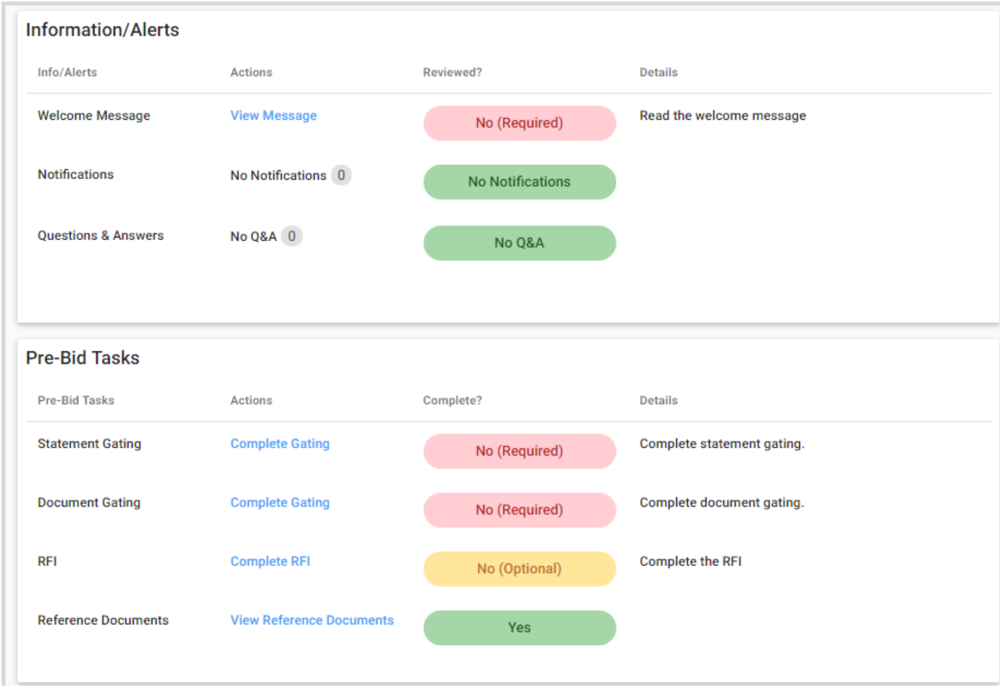
Supplier Home Page

The Supplier Home Page shows you all the bidding steps in one event. If you participate in multiple events, your Home Page may look different from one event to another, and is dependent upon how the buyer sets up each event.

Note: Depending on buyer configuration, some events may require bidders to complete certain requirements for their proposals to be considered complete. Bids in incomplete offers may be removed from consideration. Bidders may also see additional messaging on the home page and other pages, and be required to indicate that they are submitting the bid round's final proposal by clicking the **Submit Completed Proposal** button on the home page.

Each section on the home page has 4 columns:

- **Tasks** - This shows what the task is.
- **Actions** - This show what action you need to take.
- **Review/Complete** - This section tells you what needs to be done and if you have completed the task.
- **Details** - This section gives you information on what you have done so far.



Information/Alerts

- **View Welcome Message** - Click on **View Message** under Actions to see the Welcome message.
- **Notifications** - If there are notifications, you will be able to view them by clicking on **View Notifications** under actions.
- **Questions and Answers** - Click on **View Q&A** under **Actions** to view Questions & Answers.

Note: Check this section for any new messages, notifications or questions and answers that may be posted or updated. The Reviewed status may have changed from green to red again if new information is available since you last accessed.

Pre-Bid Tasks

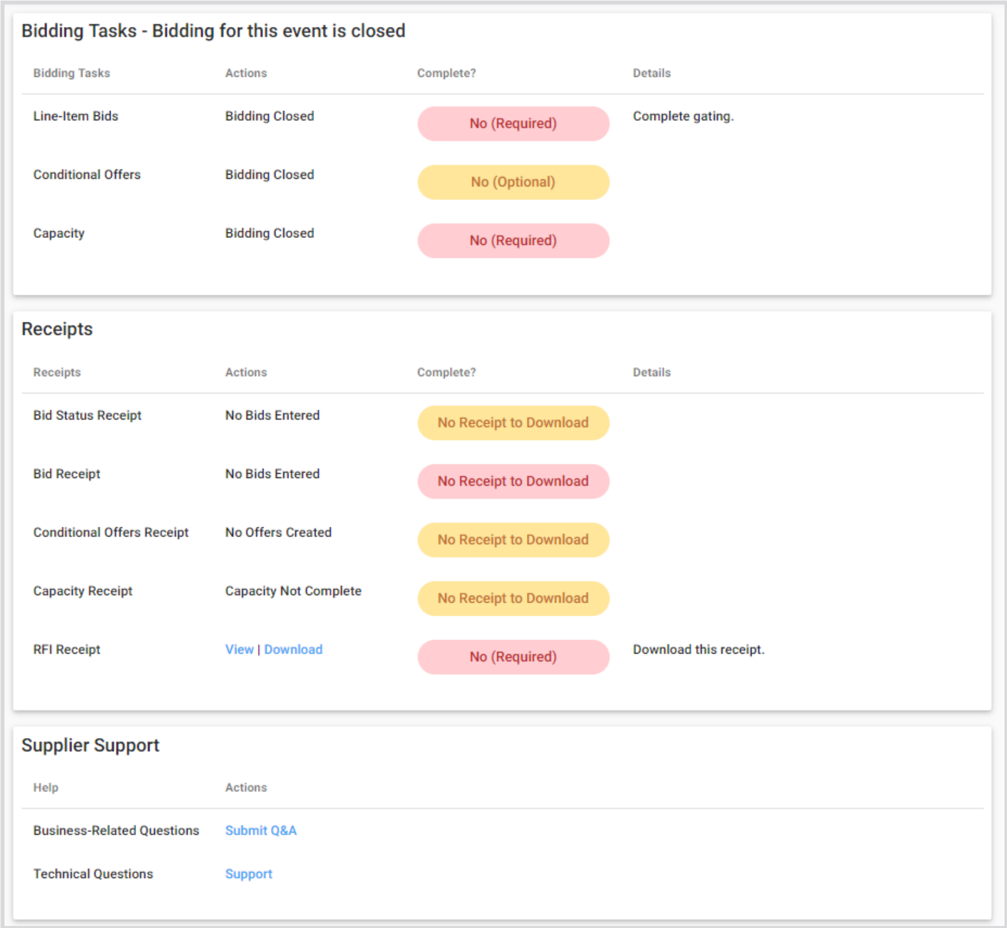
1. **Intent to Bid** - Click on **Complete Intent to Bid** under **Actions**.
   Respond with **yes** if you intend to bid and **no** if you do not intend to bid.
2. **Statement Gating** - Click on **Complete Gating** under **Actions** and Agree to any Statement Gating.
3. **Document Gating** - Click on **Complete Gating** under **Actions** and download any required Gating Documents

4. **Event Document Gating** - Click **Complete Gating** under **Actions** and download any required Event Gating Documents. You may also be required to upload required event documents. The approval status of any uploaded documents will be displayed in the “Complete?” field.

5. **Reference Document** - Click on **View Reference Documents** under **Actions**. Download any Reference Documents posted by the buyer. Reference Documents are for information only during a sourcing event. Examples include: Welcome letter and Terms, & Conditions. **Note:** Documents that are accessed in the Document Gating step will also be listed in this section. The details will display how many documents in addition to the Gating documents you have not yet reviewed.

6. **RFI** - Click on **Complete RFI**. Answer questions within the RFI. Make sure you answer any required question (those marked with asterisks). If the question requires a file upload answer you will need to upload the document under the bid documents section, and then, once you have that document uploaded, come back to the RFI and choose the document name in the drop down box. The file must be loaded into the bid documents section in order for the file name to be included in the drop down box for the RFI file upload answers. Click **Submit**. Confirm your submission. Make sure that you confirm your RFI or it will not show as complete. Note the RFI is not used in every sourcing event.

7. **Bid Documents** - Click on **Complete Bid Documents**.
   Upload bid documents here for RFI questions that require a file upload.



Bidding Tasks - Bidding for this event is closed

Bidding Tasks	Actions	Complete?	Details
Line-Item Bids	Bidding Closed	No (Required)	Complete gating.
Conditional Offers	Bidding Closed	No (Optional)	
Capacity	Bidding Closed	No (Required)	

Receipts

Receipts	Actions	Complete?	Details
Bid Status Receipt	No Bids Entered	No Receipt to Download	
Bid Receipt	No Bids Entered	No Receipt to Download	
Conditional Offers Receipt	No Offers Created	No Receipt to Download	
Capacity Receipt	Capacity Not Complete	No Receipt to Download	
RFI Receipt	View | Download	No (Required)	Download this receipt.

Supplier Support

Help	Actions
Business-Related Questions	Submit Q&A
Technical Questions	Support

Bidding Tasks

1. **Line item Bids -** Click **Complete Bidding**. You can enter bids online or offline (via download/upload with excel)

   To Bid Online: Enter your bids Online for each item you want to bid on. Make sure you complete all fields marked with an asterisk. These are required fields. Click **Update Bids** before advancing to another page to save your entries

   To Bid Offline: Download the Bid Sheet in Excel. Complete Bid sheet, save, and upload often. Any upload errors can be fixed within the Errors only sheet (displayed only if upload errors exist) and uploaded

   Note: If you are not bidding on all items in the sourcing event, the Complete status for this line item will always read “Partially”. This is ok if you are not planning to bid on all items in the event.

2. **Capacity** - click on Complete Capacity under actions.
    a. If Capacity menu exists, enter your higher level capacity adjacent to the total of what you bid at the item level
    b. Click **Submit** to save your work
    This additional Capacity collection prevents you from being awarded more business than you can commit to the buyer. Item level capacity (if required) is separate from capacity provided through the capacity menu.
3. **Packages** - click on Complete Packages
    a. Click on **Create Package**.
    b. Type in a package name, and click **Ok**.
    c. Package Comments are optional and used to help identify contents of the Package.
    d. Check boxes adjacent to items you wish to include in your package and click **Add Selected Items to package**.
    e. Always click the **Add Selected Items to Package** button before advancing to another page.
    f. Price each item within your package.
    g. The prices submitted are only valid if the entire package is awarded to you.
    h. Prices can also be imported from your item-level bids by clicking on **Import Pricing**. This allows for a general discount off of your bids to be applied to all items within your package.
    Building Package offers is an optional step. Some events require that a bid must be placed on every item included in a package.
4. **Conditional Offers -** Click on **Complete Conditional Offers**. Building Conditional Offers is an optional step.
    a. Click **Create Conditional Offer**.
    b. Enter a name for your Conditional Offer and click **Next step**.
    c. Select all items or specific items you must win for your discount to trigger. Click **Next step**.
    d. Select **Same as Items in Trigger**, **All Items**, or choose specific items that you will discount if your offer criteria are met. Click **Next step**.
    e. Enter the amount of business you must win for the offer to trigger and also how much you will discount them. Click **Save**. Tiered offers can be entered by clicking on the **+** symbol.

5. **Event Documents** - Click on **Complete Event Documents**.
   If a buyer wants you to upload documents into the event, this will take you to the event documents where there will be a placeholder for you to upload the documents into the event. If you have multiple documents and there is only one placeholder, you can zip all the files into a zip file and upload that file into the event.

Receipts

1. **Bid Status Receipt** - View bid status under actions
2. **Bid Receipt** - View bid receipt under actions.
   Note: The bid receipt you see will be the standard view and may not reflect all fields you completed when placing your bid. If you click on view you can also see the detailed view which will show you all fields.
   a. View, download, and save all of your Receipts for your records.
   b. Data within your Receipt is exactly what JAGGAER has received from your company.
3. **Conditional Offers Receipt** - View conditional offer receipt under actions.

Supplier Support

1. **Getting Started** - Click **Watch Video** under actions.
2. **Business Related Questions** - Click **Submit Q&A** under **Actions**.
   Post your questions on this event for the buyer to answer here. When the buyer answers your question you will receive a notification telling you that the question has been answered. You will be able to view the answer under the Q&A section.
3. **Technical Questions** - Click **Support** under **Actions** to enter a support ticket.
   Enter your technical support questions on the event here for JAGGAER Support to answer.