Icertis eSourcing Supplier User Guide

January 2021

Contents

Purpose

This guide is designed to help users understand the sourcing process within the Icertis Contract Management (ICM) system. A detailed explanation of how the system works and how the user can access different functions in variable scenarios is provided, such as:

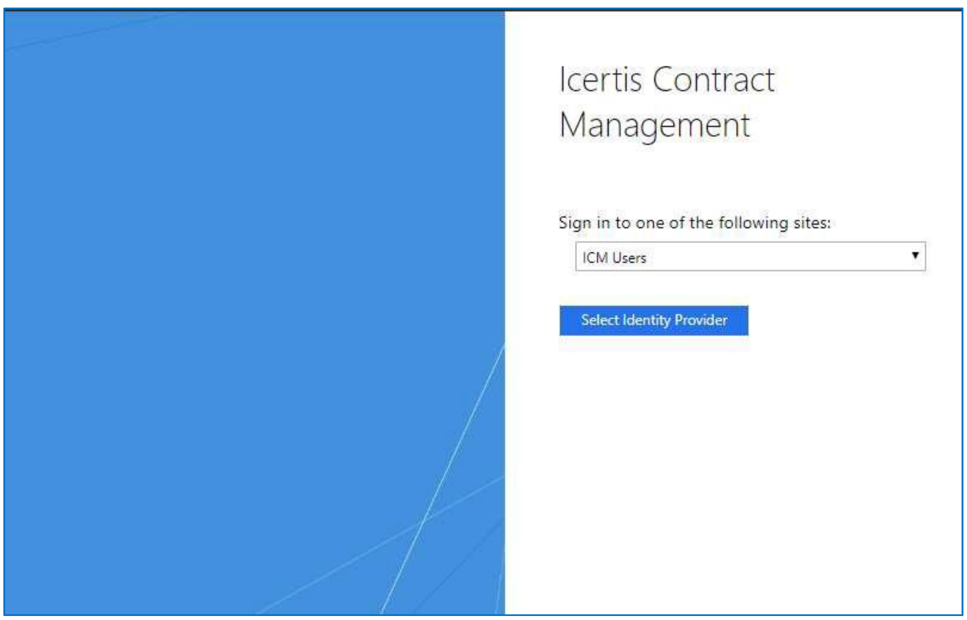
- Process of sequential workflow to view procurement events
- Ability to open necessary documents through attachments
- Option to view and analyze Vizient® questionnaires and submit responses

Refer to this document at any point during the workflow process to help you easily access and navigate procurement events.

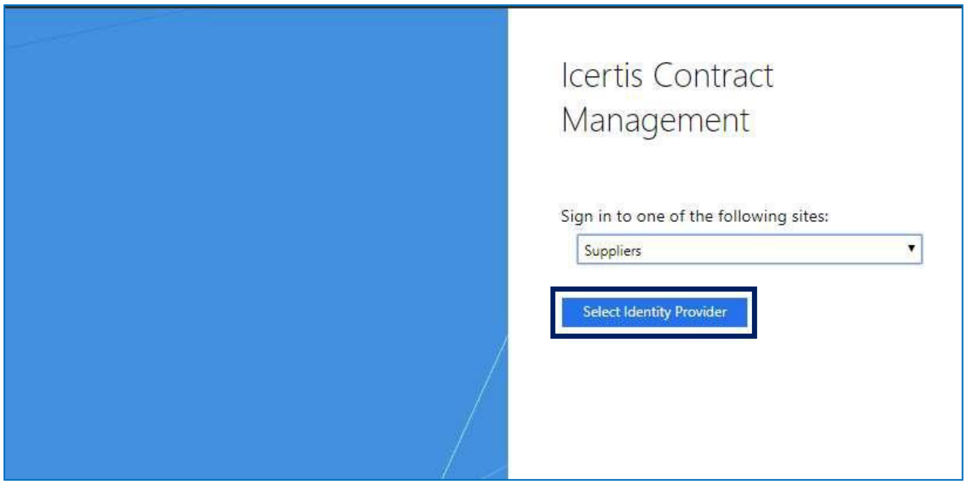
Logging into ICM

Use Google Chrome to access system

1. Enter the URL https://vizient.icertis.com to access the ICM system.

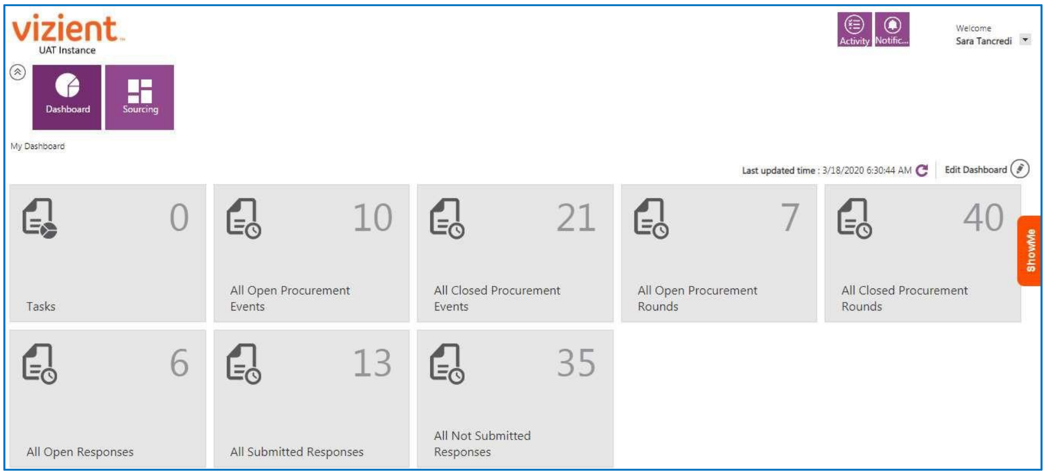


2. Select ‘Suppliers’ from the dropdown menu and click on ‘Select Identity Provider’.



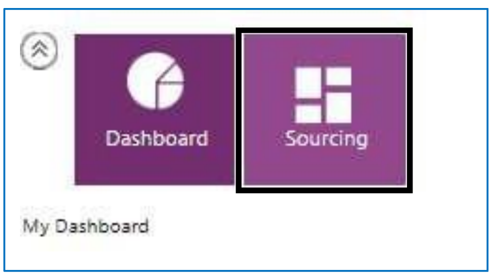
3. Once the Single Sign-On (SSO) page opens, enter your login credentials and click ‘Next’.

4. The home page is displayed after successful login.

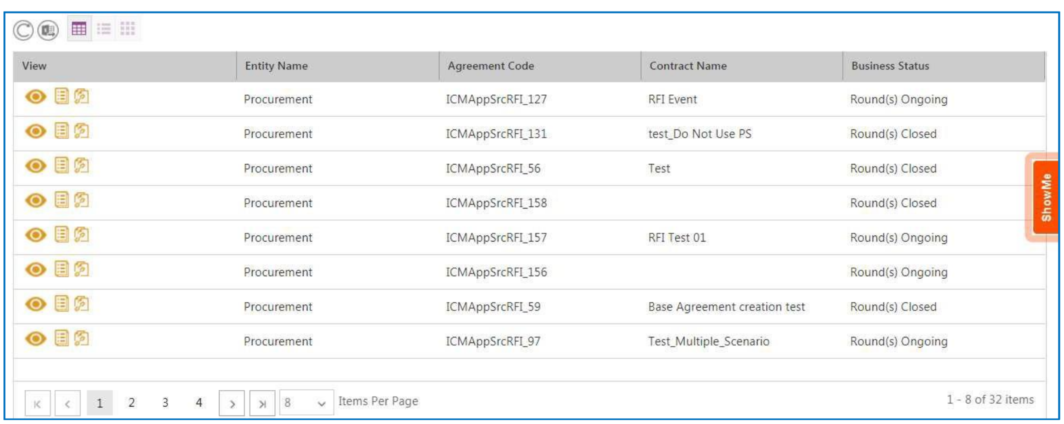


Accessing the procurement event

1. To access the procurement event, click the ‘Sourcing’ tile on the Dashboard.

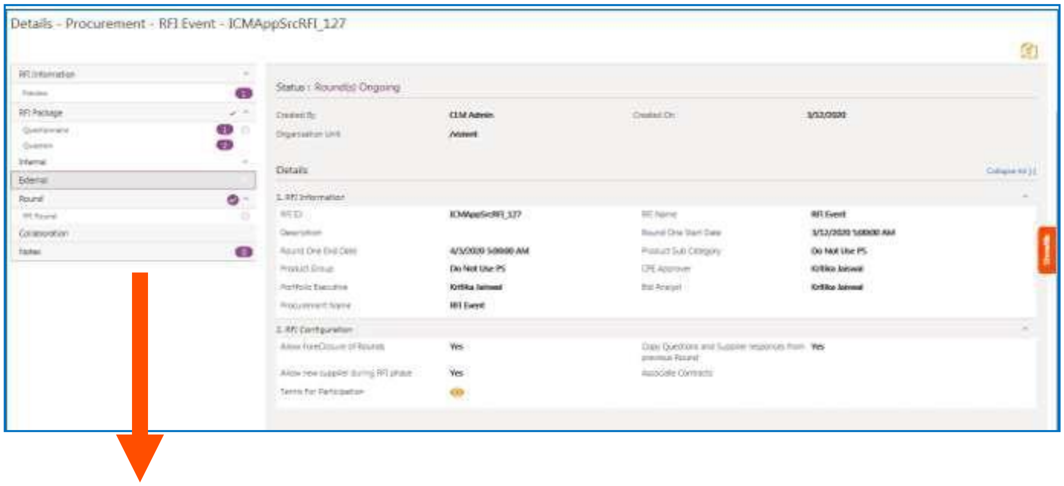


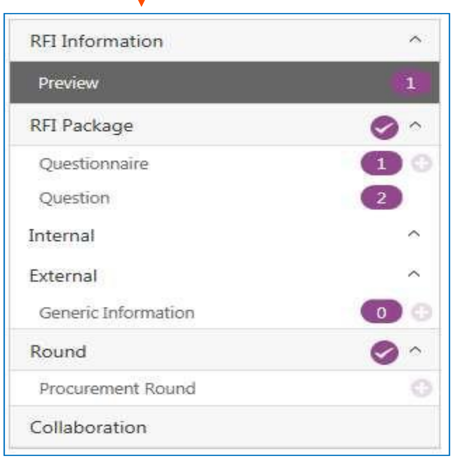
2. After selecting the ‘Sourcing’ tile, all procurement events are displayed on the grid.



3. Click the ‘View’ icon  to open the procurement event details page.

4. The procurement details page provides information for the procurement event such as Status, Round Start Date, Round End Date, etc.

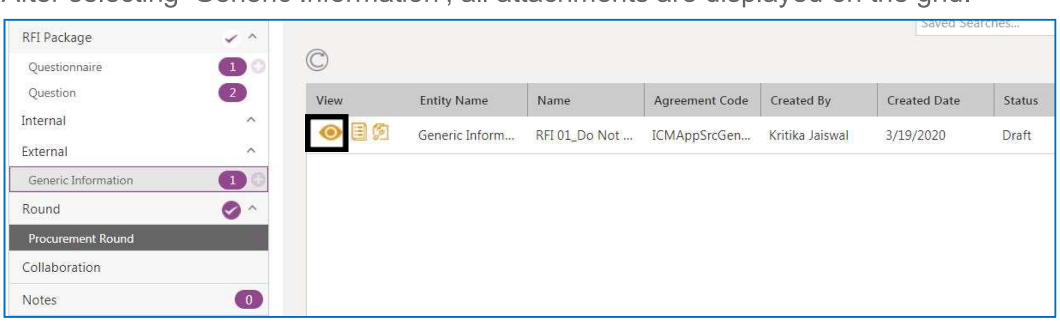




External attachments — Vizient can attach documents for suppliers to view and download. Suppliers access these documents in the ‘Generic Information’ tab.

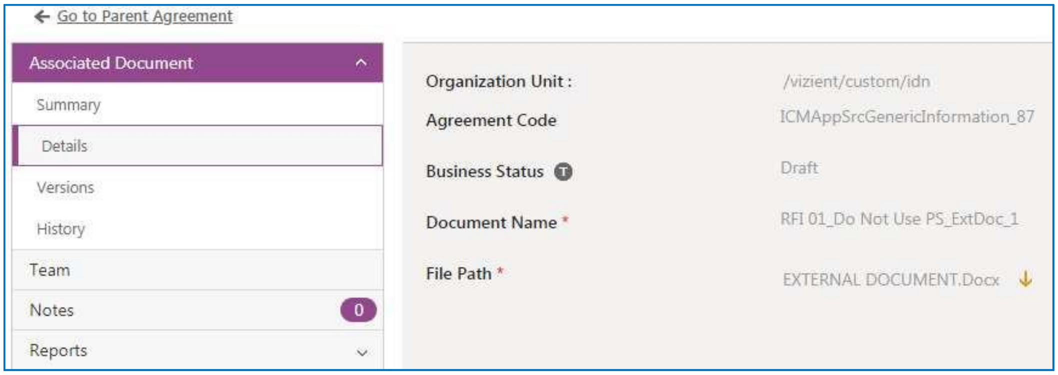
Downloading external attachments

1. After selecting ‘Generic Information’, all attachments are displayed on the grid.

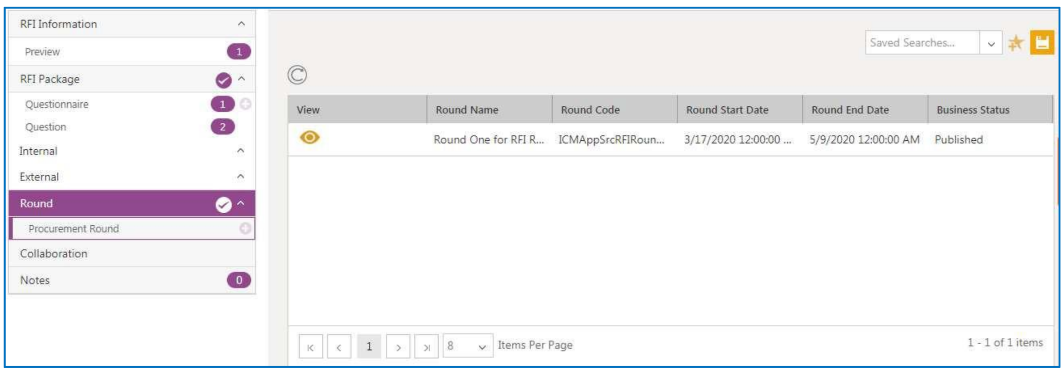


2. Click the ‘View’ icon  to open the document.

3. Click the ‘Details’ tab on the left panel and ‘Download’ to download the document.



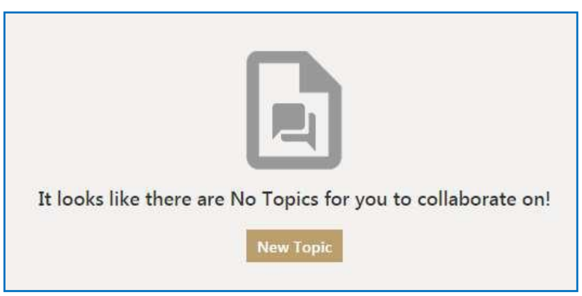
4. This section provides the number of procurement rounds created by Vizient for the event. Suppliers are shown only those rounds for which they have been added.

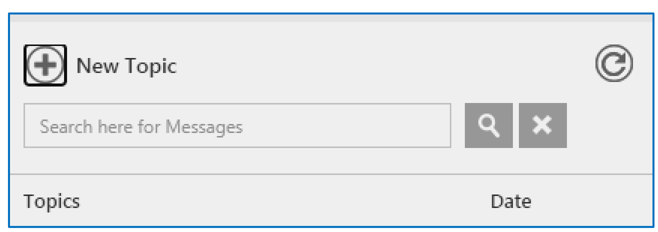


Collaborating

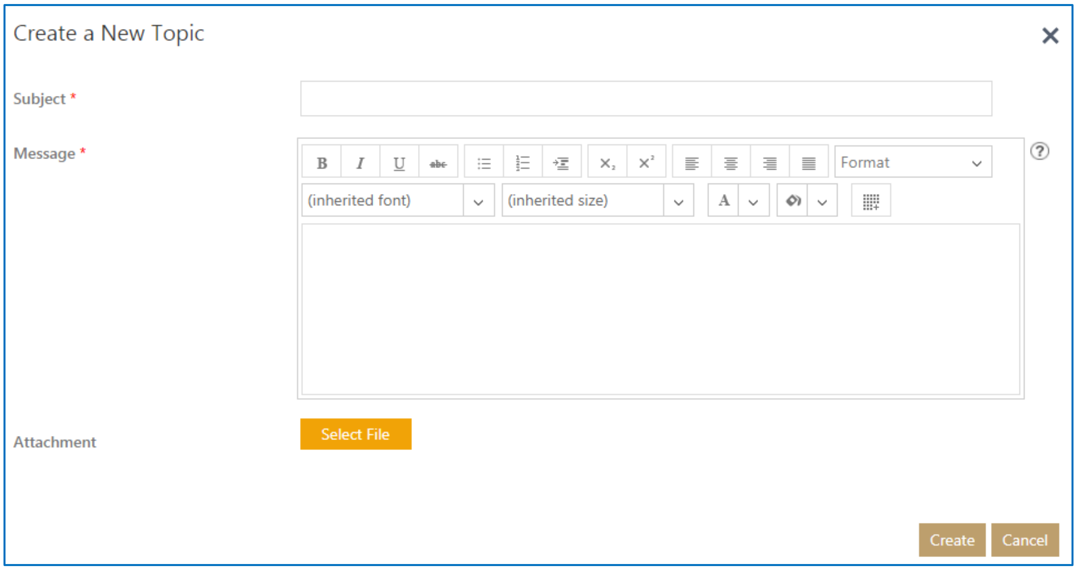
Collaboration is a discussion forum suppliers use to communicate with Vizient by exchanging messages and documents. Suppliers can start a new discussion by creating a topic at any point in time.

1. Using either of the display options below, click on ‘New Topic’ to begin collaborating.

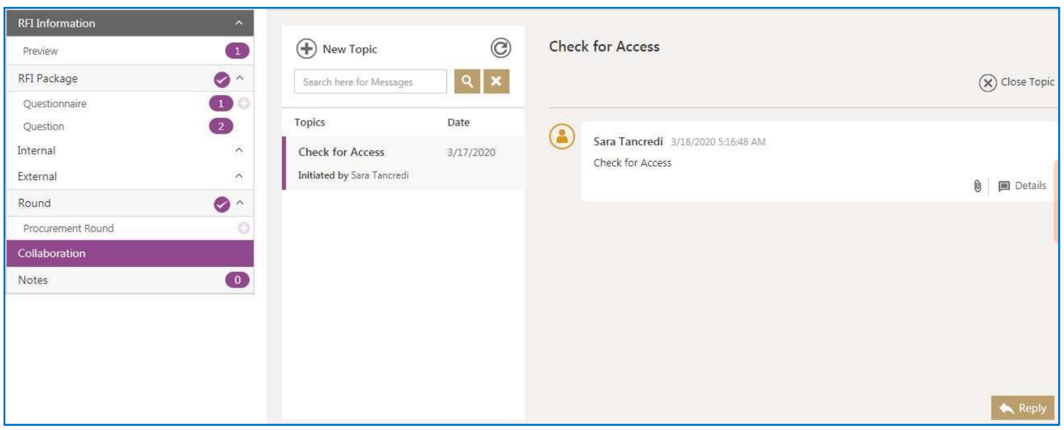




2. Populate the following information:
    a. Include the subject of discussion and message
    b. Click ‘Select File’ to include attachment
    c. Click on ‘Create’ to publish the message and attachments to Vizient

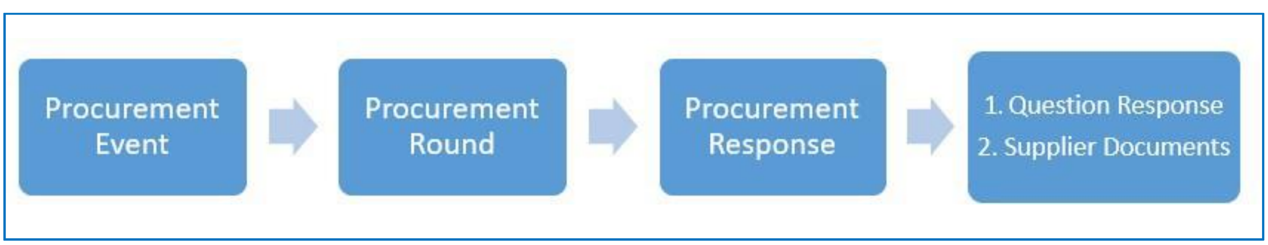


3. Published message is shown in tab and available to Vizient.



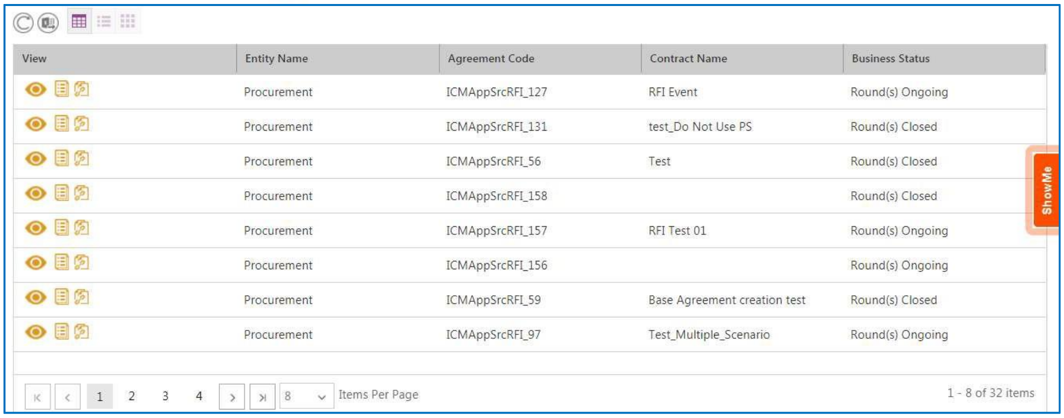
Responding to an event

For ease of navigation, refer to the steps below for providing a response to Vizient.

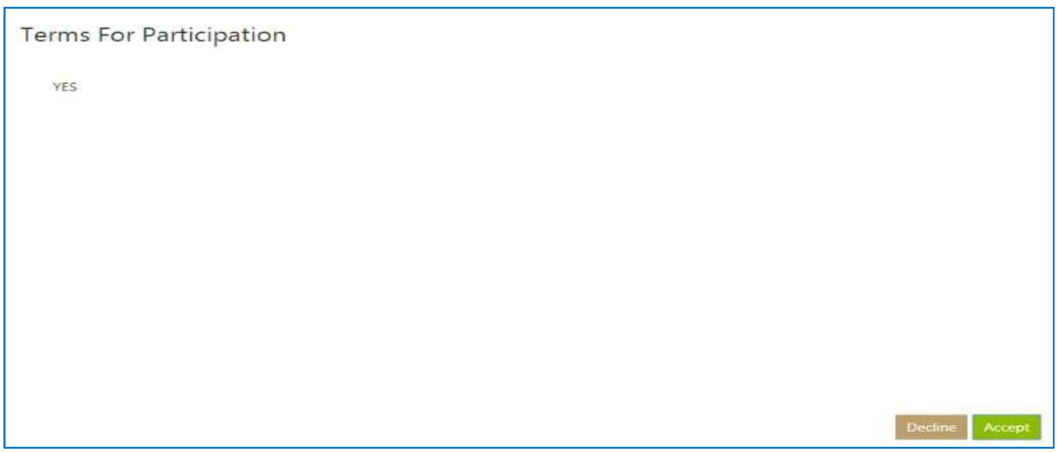


Procurement event

1. Click the 'View' icon  to access the procurement event.

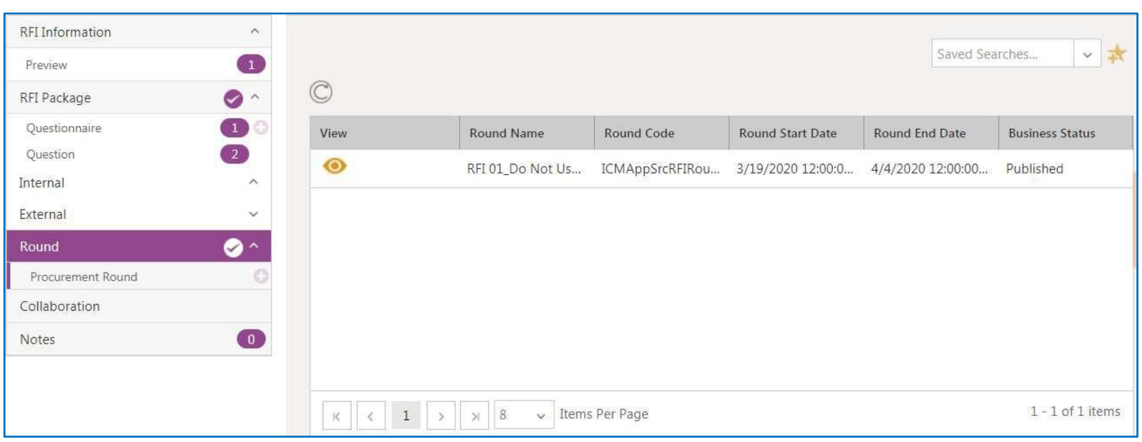


2. After clicking the 'View' icon, the 'Terms For Participation' will appear. Once terms are accepted, the supplier can access the procurement event.

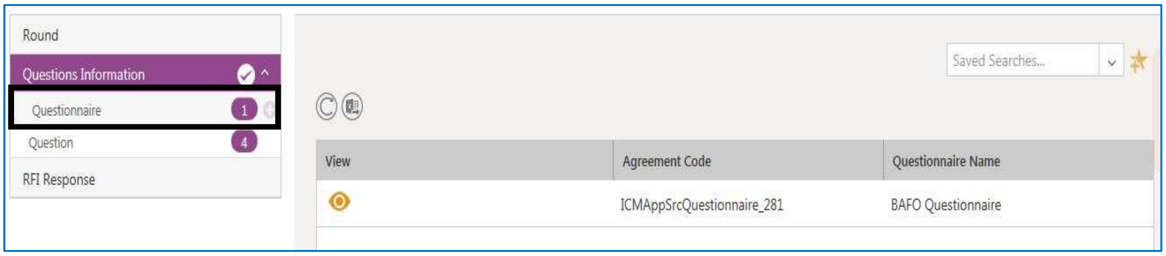


Procurement rounds – View only

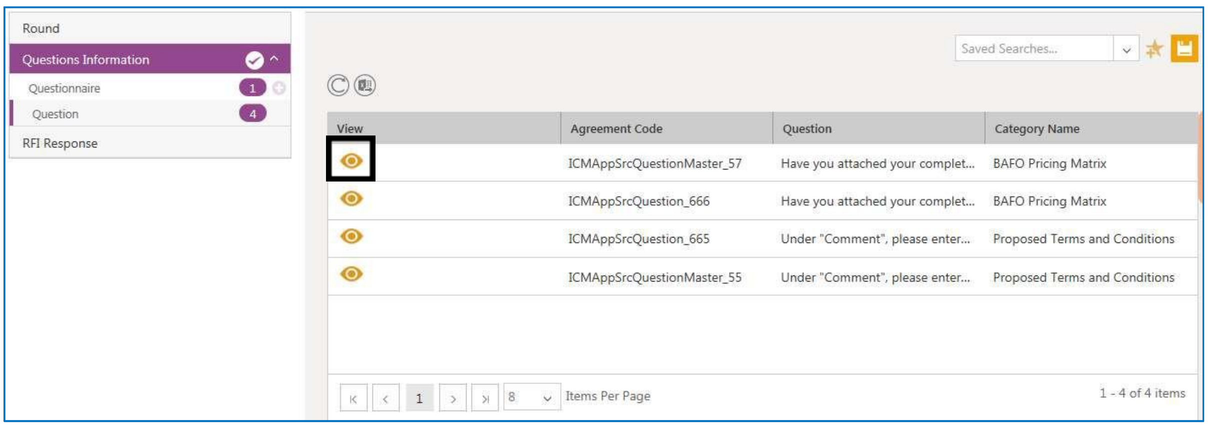
1. After the procurement details page opens, click the 'Round' tab in the left panel. Click the 'Procurement Round' in the round section. The system will display the round that has been created for the event in the grid.



2. Click the ‘View’ icon to open the ‘Details Procurement Round’ page.
3. The count of ‘Questionnaires’ and ‘Questions’ are displayed by the ‘Question Information’ tab on the left panel. Click the ‘Questionnaire’ tab to verify the questionnaire name. The details page in the questionnaire round is the same as that in the procurement event.



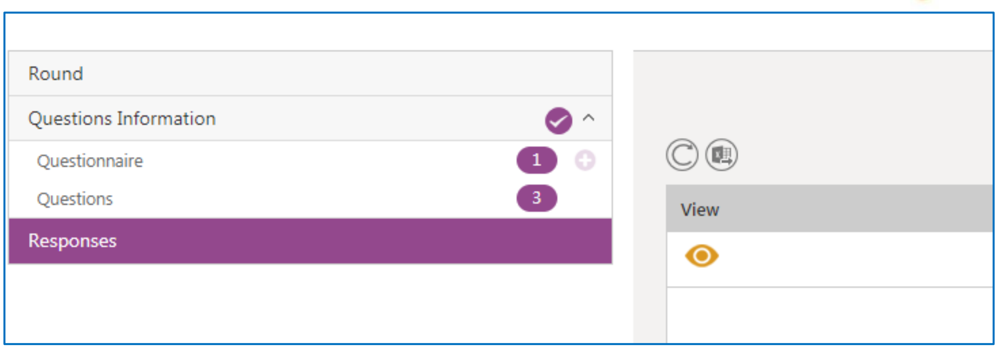
4. Click the ‘Question’ tab on the left panel to view the list of questions requiring responses.



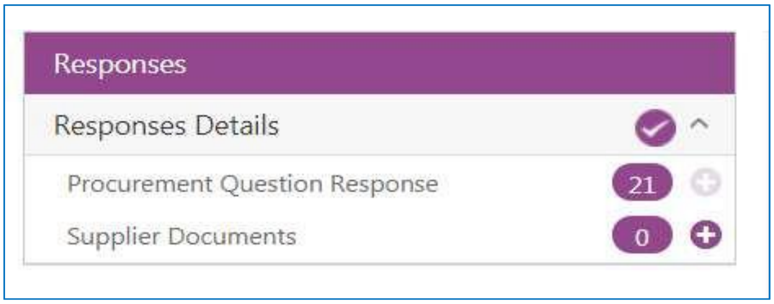
5. Click the ‘View’ icon to view the entire question and details. The details page in the question round is the same as that in the procurement event.

Procurement response – How to respond

1. Click on the ‘Response’ tab in the left panel and open the response shown in the grid to view the request-for-information (RFI) response details. Then click the ‘View’ icon .



2. The ‘Question Response’ and Supplier Documents’ tabs are shown in the left panel.



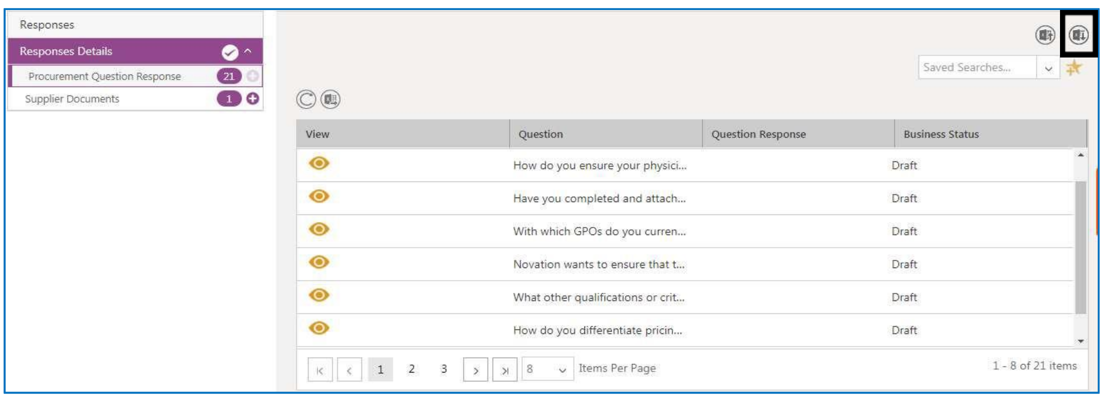
3. There are two methods to provide a response:
   - Excel (preferred method)
   - User interface

Providing a response through Excel

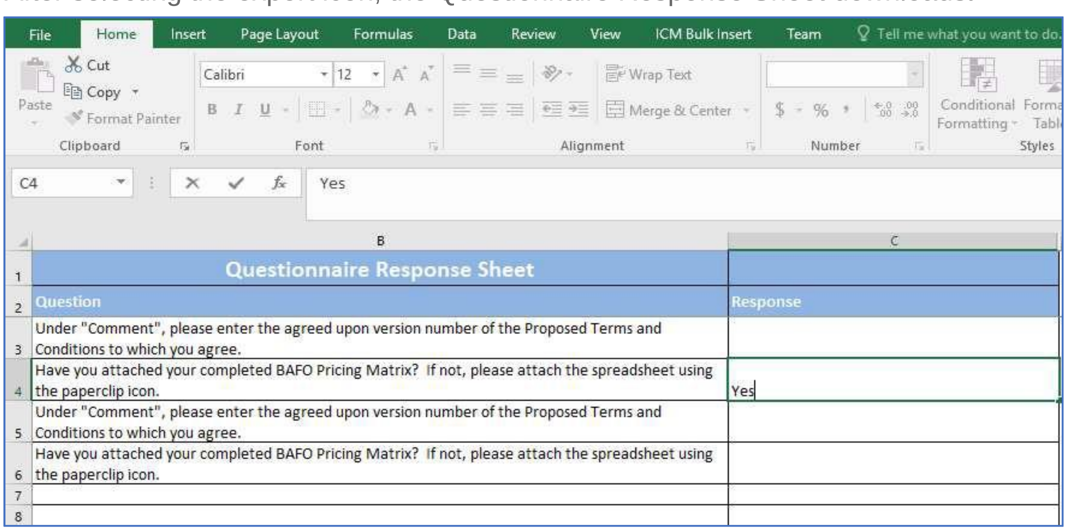
This method allows suppliers to provide responses to all questions in bulk.

1. Click the ‘Question Response’ tab to view the list of questions in the grid.

2. Click the ‘Export Excel’ icon  located on the top right corner of the grid.



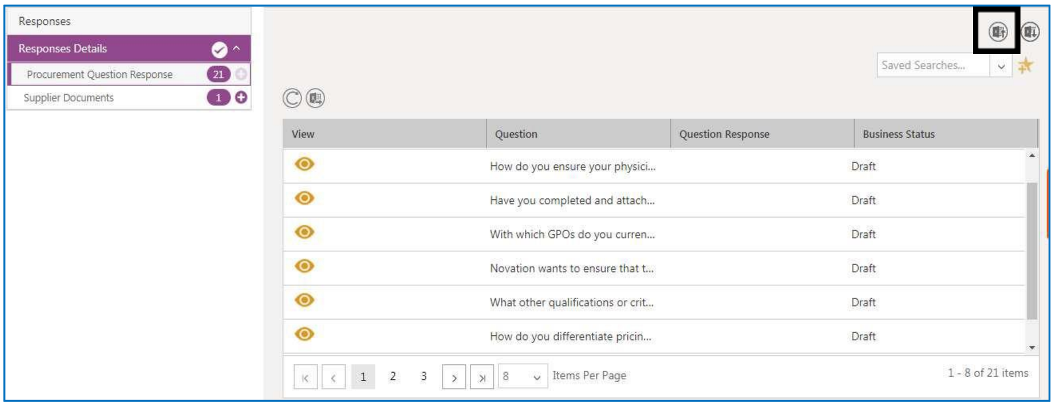
3. After selecting the export icon, the Questionnaire Response Sheet downloads.



4. The downloaded sheet contains a column with the list of questions. The supplier provides responses to each of the individual questions in the ‘Response’ column.
   a. Note: Do not change any column header in the file or the upload will fail. Only enter responses for each question under the ‘Response’ column.

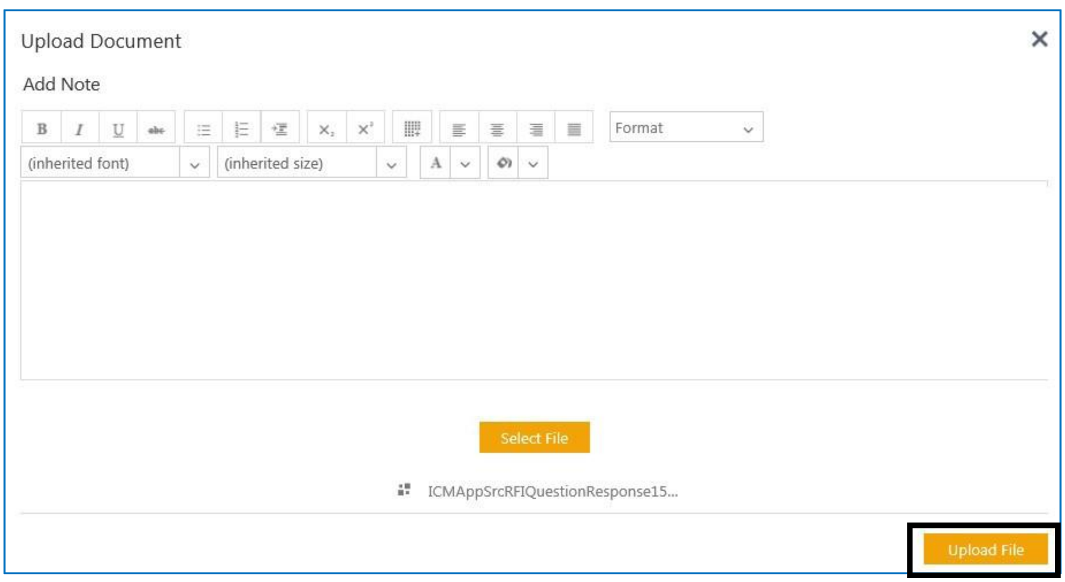
5. Ensure the file name contains your company name and content of the file, then save the file.

6. Upload the response sheet in the system by clicking on the ‘Import’ icon on the top right corner of the grid.



7. The upload document pop-up opens with an option to upload the saved response file.

8. After selecting the file, click on *Upload File* button.



9. The system will validate the file and give the count of: Records Processed, Records Successful, Records Deleted and Records Failed. In case of any error, an error log will also be generated.

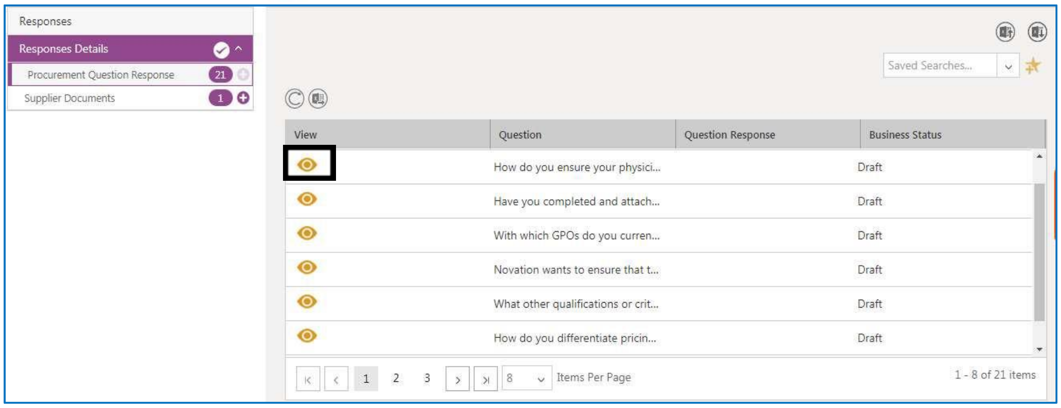
10. Click the ‘Ok” button to save the responses in the system.

Providing a response through the User Interface (UI)

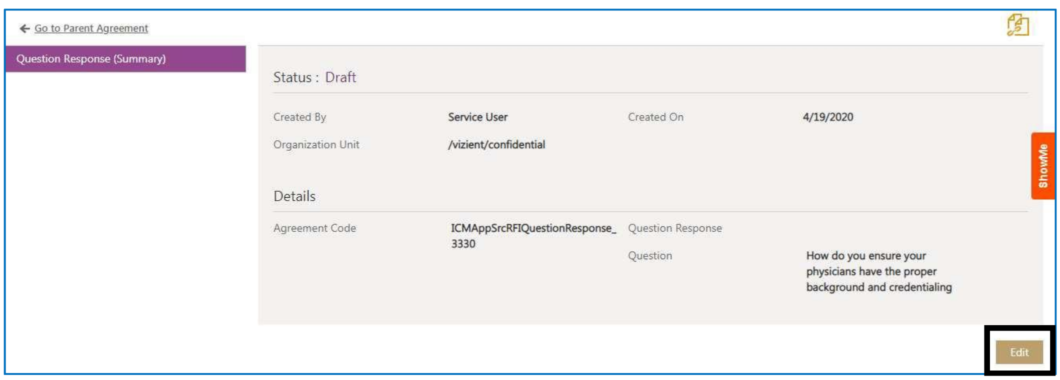
This method of providing a response allows suppliers to answer each question individually. It is not possible to provide bulk responses directly from the UI.

1. Click the ‘Question Response’ tab to view the list of questions in the grid.

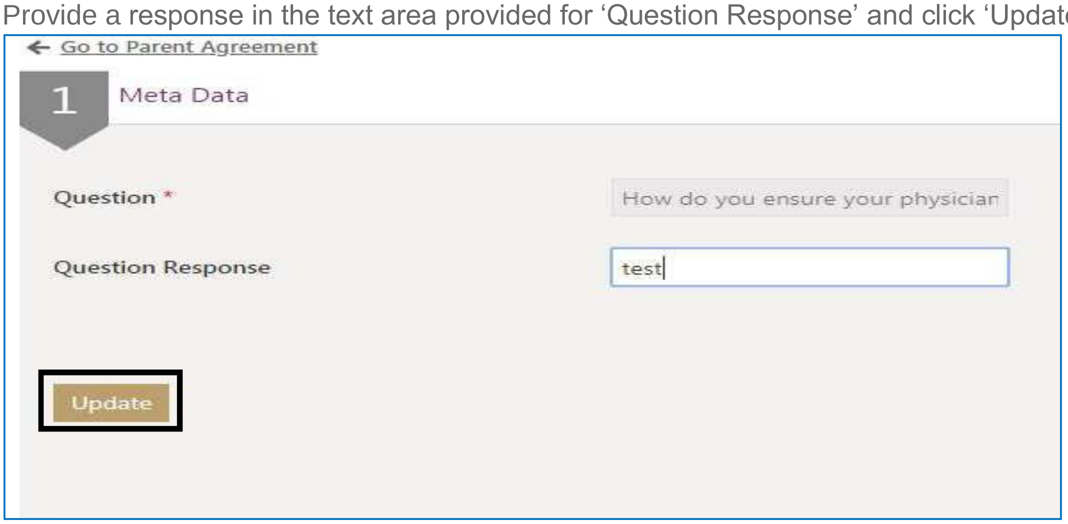
2. Click the ‘View’ icon  to open the question and provide a response.



3. Once the ‘Question Response (Summary)’ opens, click ‘Edit’.

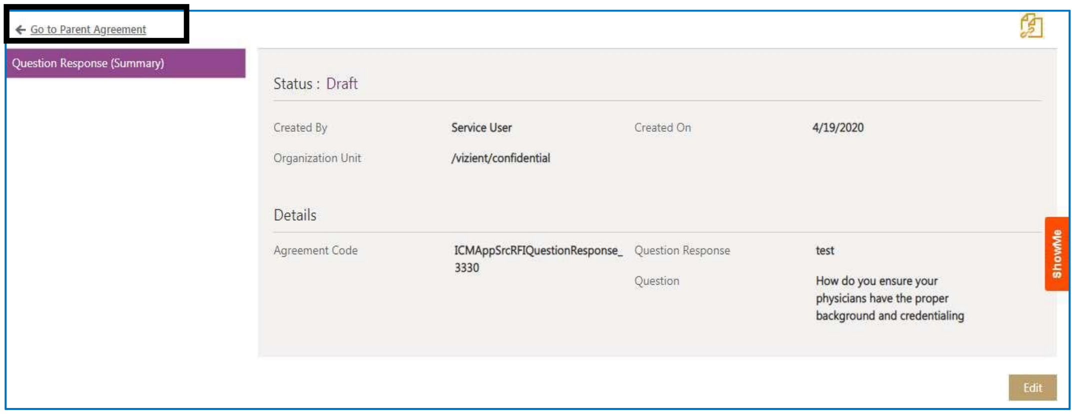


4. Provide a response in the text area provided for ‘Question Response’ and click ‘Update’.

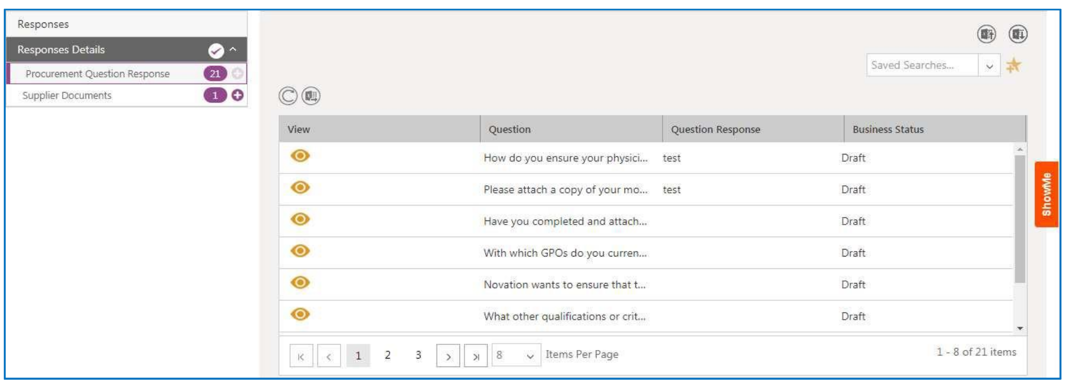


5. The response is submitted and is visible in the ‘Summary’. To make additional changes, click ‘Edit’.

6. Click the ‘Go to Parent Agreement’ option to navigate back to procurement response.

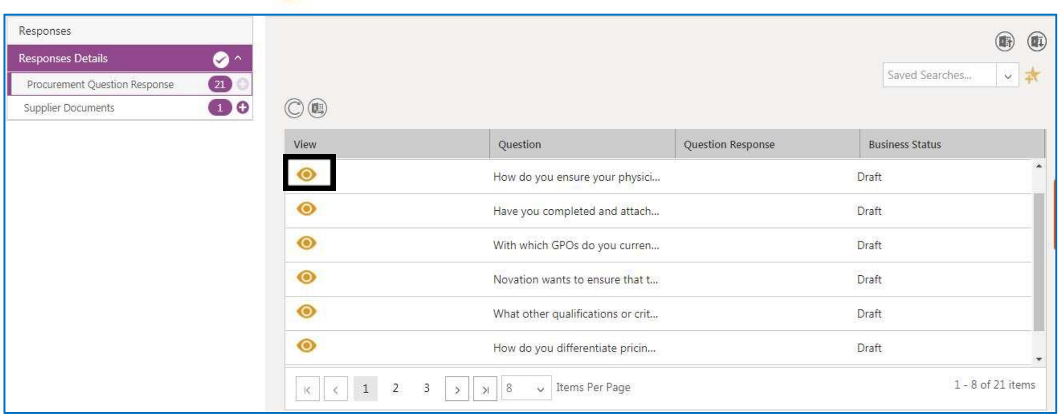


7. The list of questions and corresponding responses are provided in the ‘Question Response’ tab.

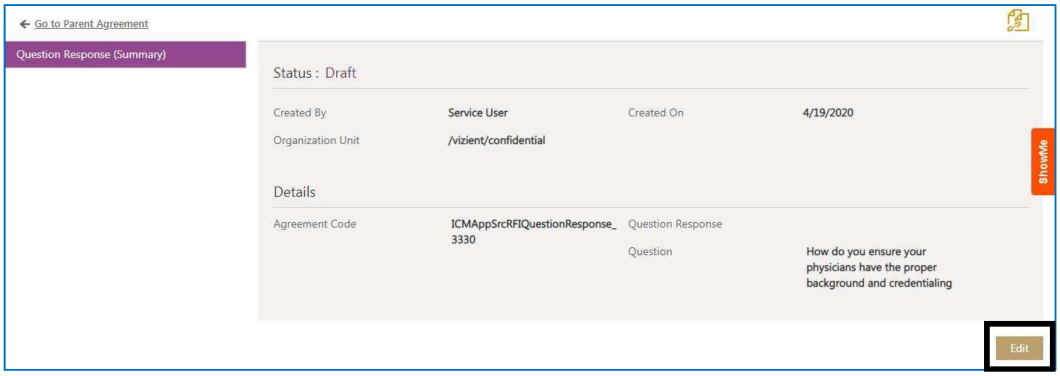


8. Click the ‘Question Response’ tab to view the list of questions in the grid.

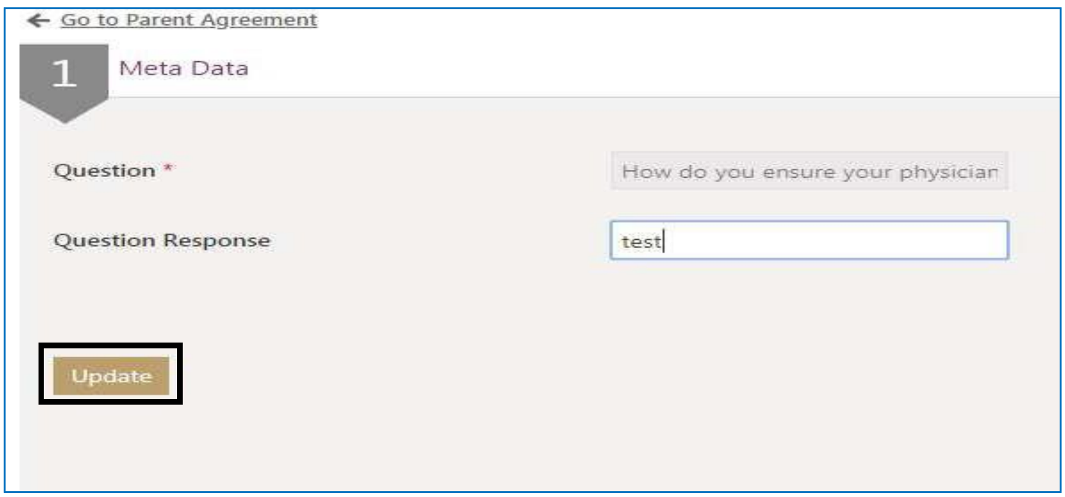
9. Click the ‘View’ icon  to open the question and provide a response.



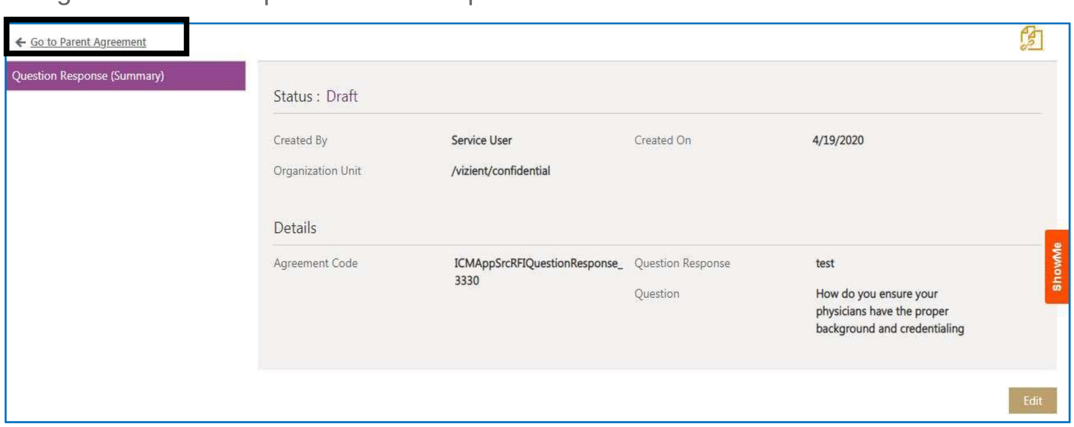
10. Once the ‘Question Response Summary’ opens, click ‘Edit’.



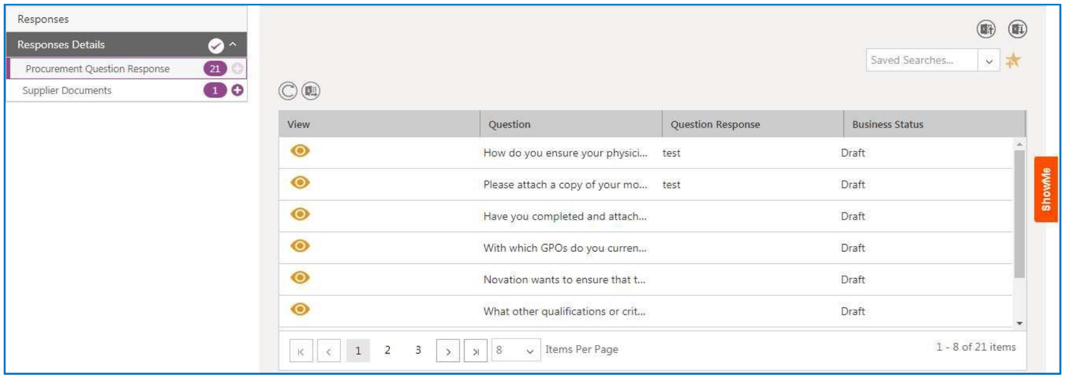
11. Provide a response in the text area for ‘Question Response’ and click ‘Update’.



12. The response is submitted and is visible in the ‘Summary’. To make additional changes, click ‘Edit’. Otherwise, click the ‘Go to Parent Agreement’ option to navigate back to the procurement response.



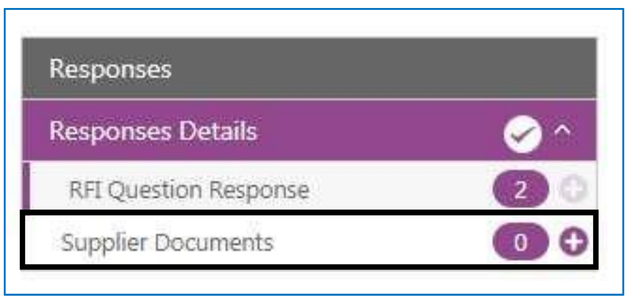
13. The list of questions and corresponding responses are provided in the ‘Procurement Question Response’ tab.



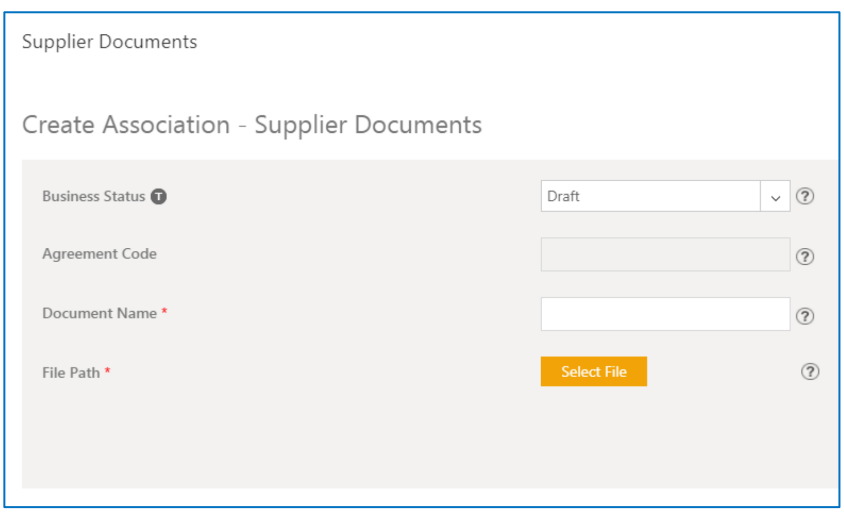
Uploading supplier documents

1. Add documents, such as pricing sheets, in this section in any of the given file formats: PDF, Excel, Word or image file.

2. Click on the ‘+ ‘sign for the ‘Supplier Documents’ tab to add attachments.

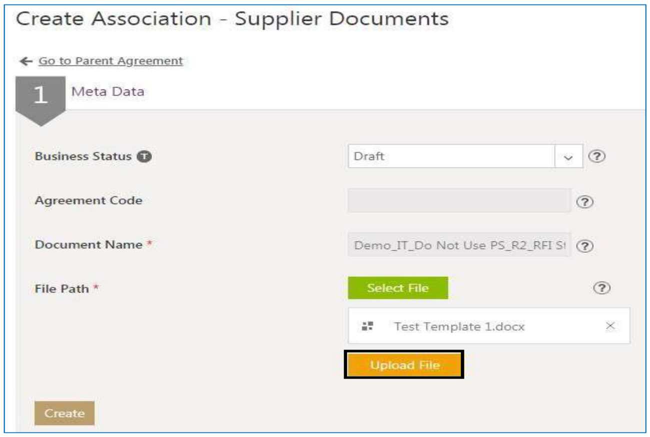


3. The ‘Create Association page’ is now displayed.

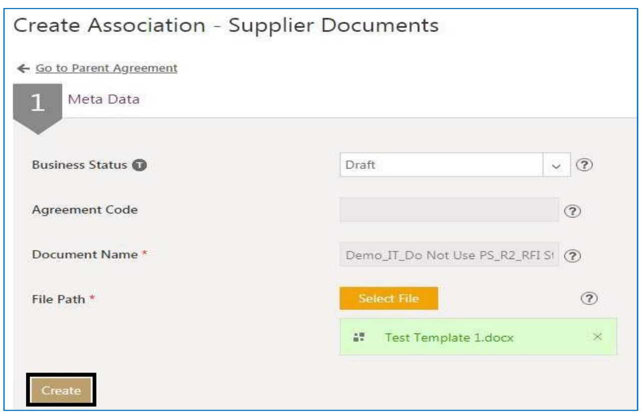


4. Specify the supplier name and document name for the 'Document Name' field.

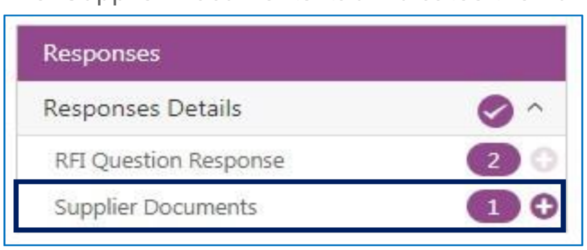
5. Click 'Select File' to choose the document from your local drive and click 'Upload File'.



6. Once the document is uploaded in the file path, click the 'Create' to attach the document.



7. The 'Supplier Documents' tab indicates the number of attached files.

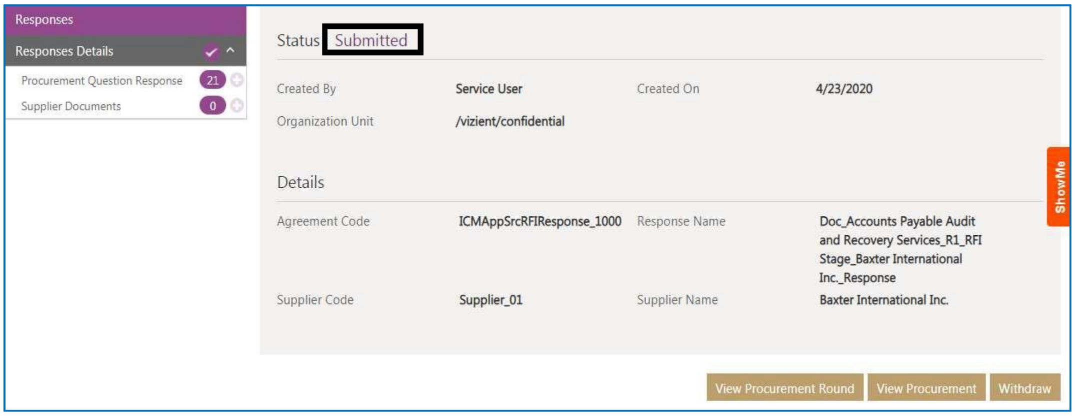


Actions available at each status of Procurement Response

At this point we've demonstrated the process of providing a response in the system, however, responses have not been submitted yet. There are various actions suppliers can initiate for the response.

Submit response

1. Once the status of the Procurement Response changes to ‘Submitted’, the following buttons are available:
   a. ‘View Procurement Round’ returns user to the Procurement Round.
   b. ‘View Procurement’ returns user to the Procurement Event.
   c. ‘Withdraw’ allows the user to withdraw responses previously submitted. This option is available if the Round is ongoing.



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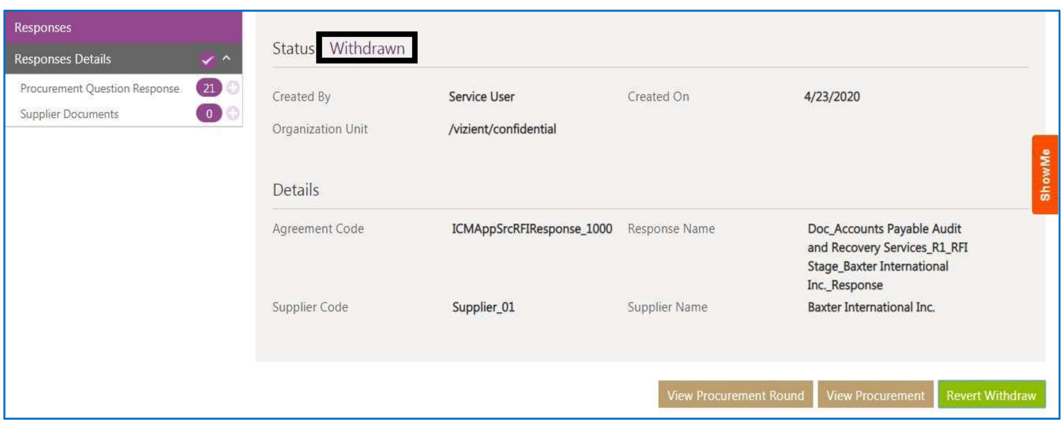
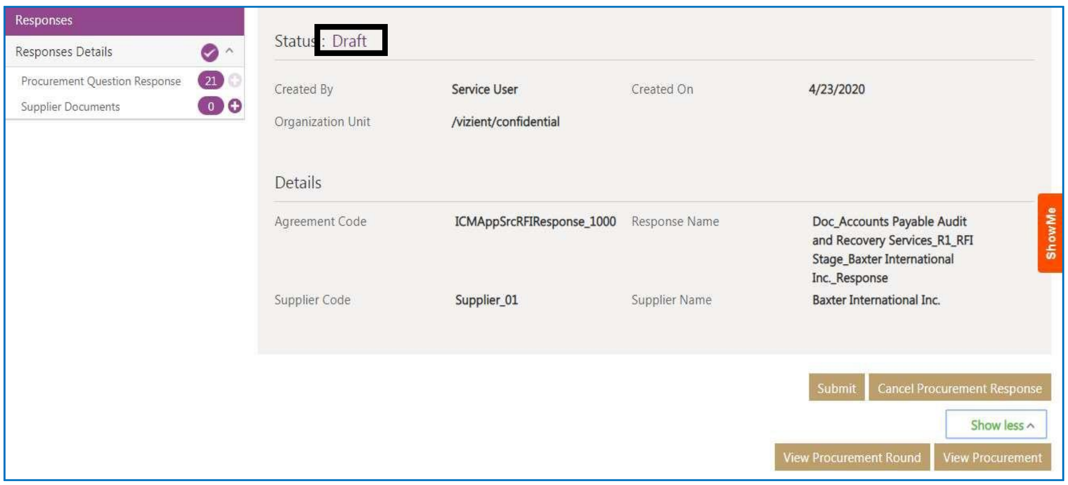
Withdraw response

1. Once the status of the Procurement Response changes to ‘Withdrawn’, the following buttons are available:
   a. ‘View Procurement Round’ returns user to the Procurement Round.
   b. ‘View Procurement’ returns user to the Procurement Event.
   c. ‘Revert Withdraw’ allows user to revert the withdraw and provides option of submitting responses again. This option is available if the Round is ongoing.



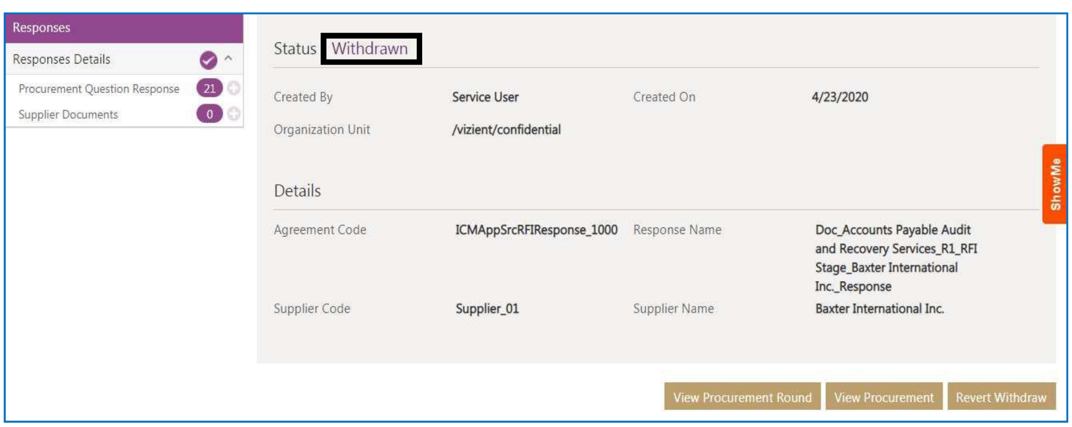
Revert withdraw

1. Once the status of the Procurement Response changes to 'Draft', the following buttons are available:
   a. 'Submit' allows user to submit responses that were previously provided.
   b. 'Cancel Response' allows user to cancel the response and opt out of the event. This option is available if the Round is ongoing.
   c. 'View Procurement Round' returns user to the Procurement Round.
   d. 'View Procurement' returns user to the Procurement Event.



Cancel response

1. Once the status of the Procurement Response changes to 'Withdrawn', the following buttons are available:
   a. 'View Procurement Round' returns user to the Procurement Round.
   b. 'View Procurement' returns user to the Procurement Event.
   c. 'Revert Withdraw' allows user to revert the withdraw and provides option of submitting responses again. This option is available if the Round is ongoing.



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