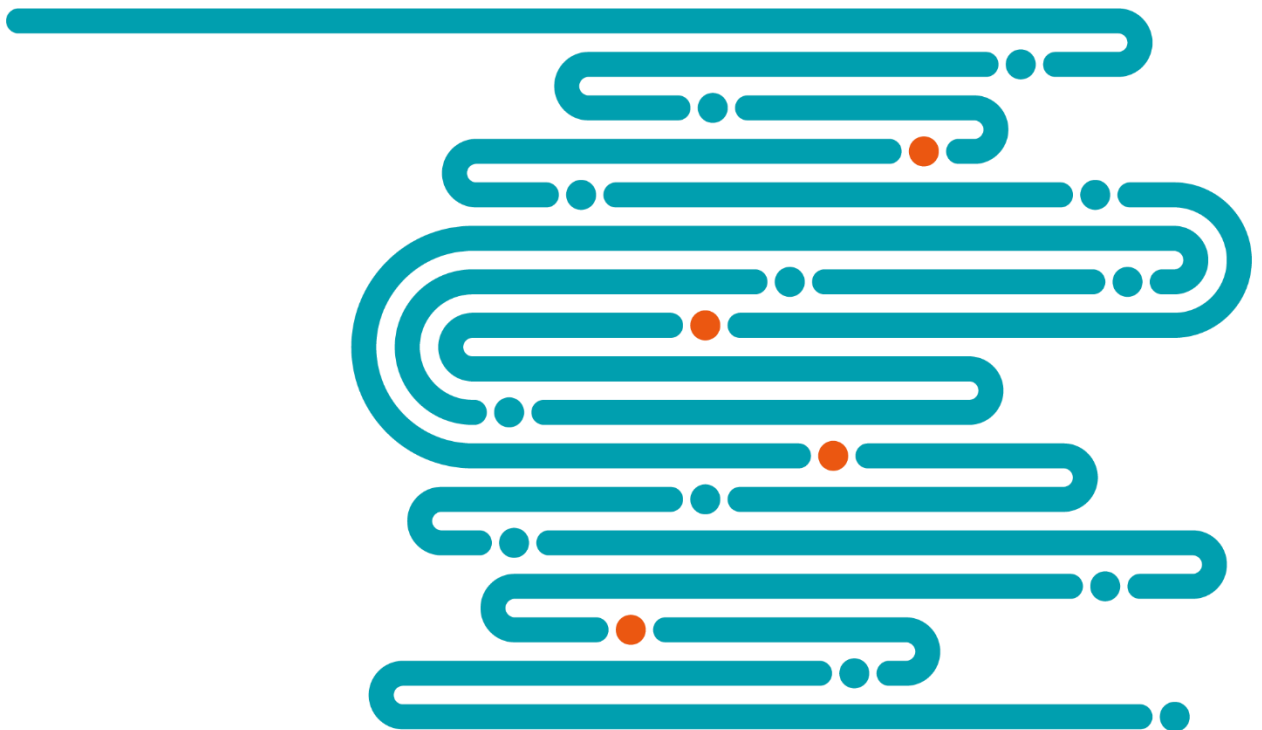


Icertis eSourcing Supplier User Guide

January 2021



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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:

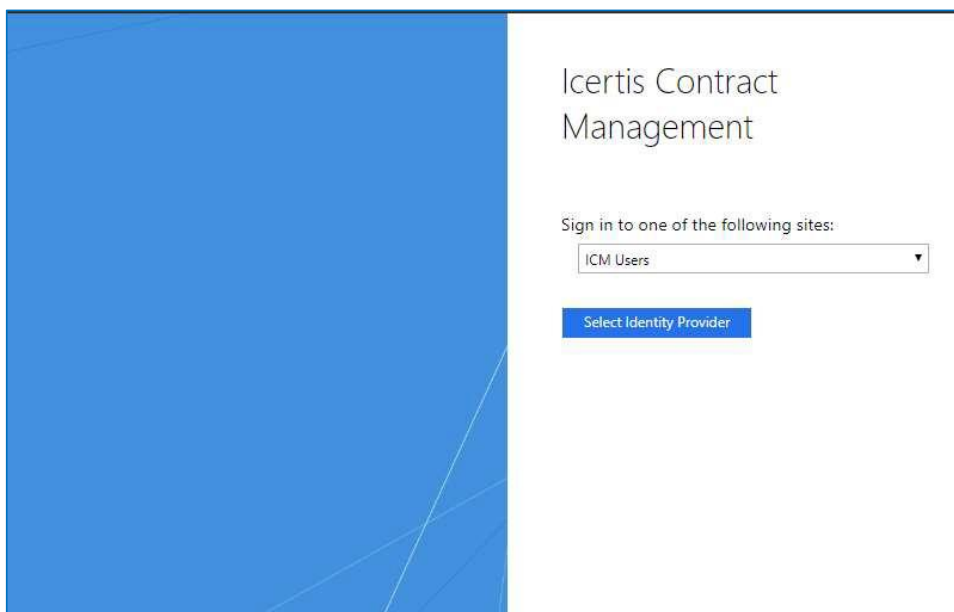
- Process of sequential workflow to view procurement events
- Ability to open necessary documents through attachments
- Option to view and analyze Vizient® questionnaires and submit responses

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

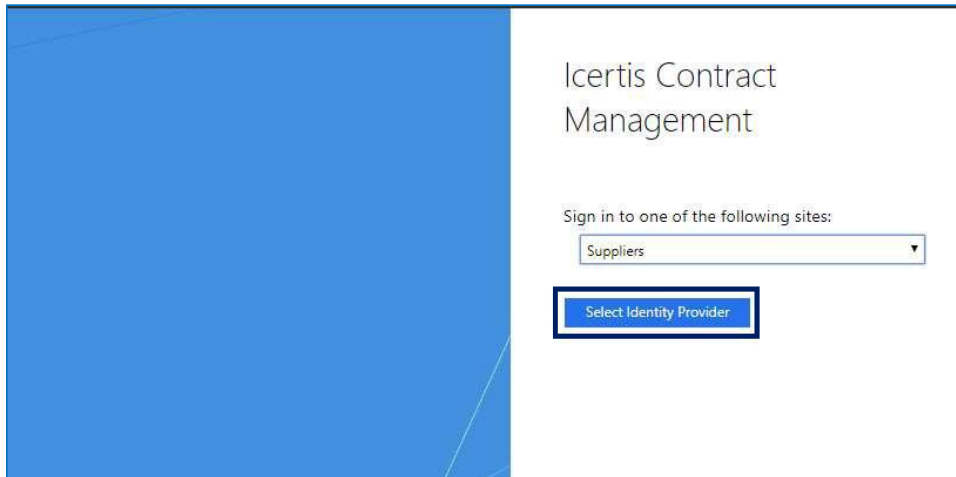
Logging into ICM

Use Google Chrome to access system

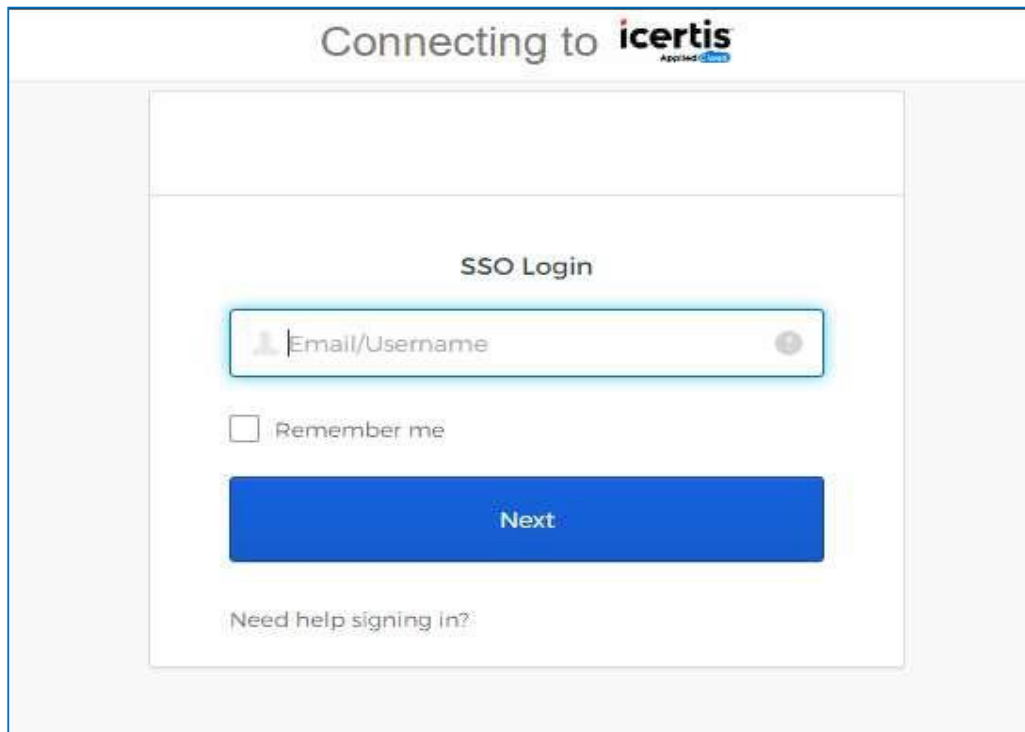
1. Enter the URL <https://vizient.icertis.com> to access the ICM system.



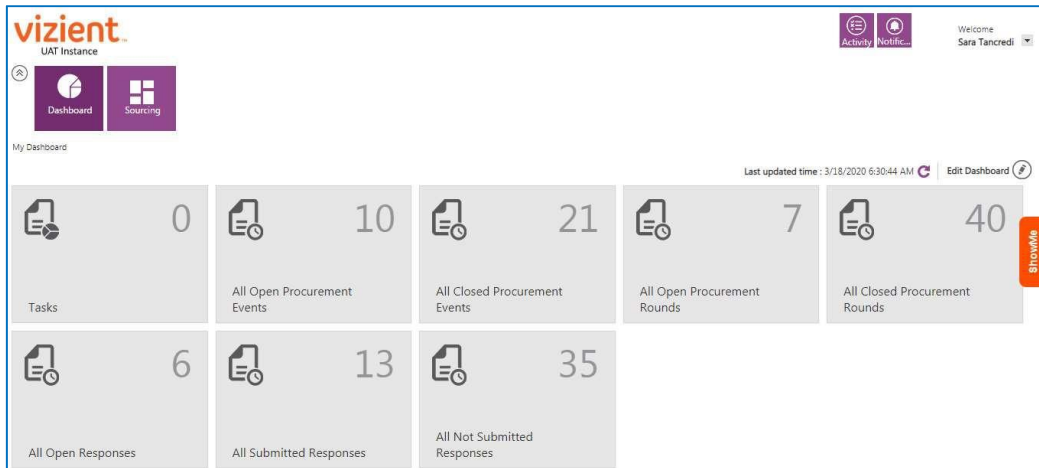
2. Select 'Suppliers' from the dropdown menu and click on 'Select Identity Provider'.



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

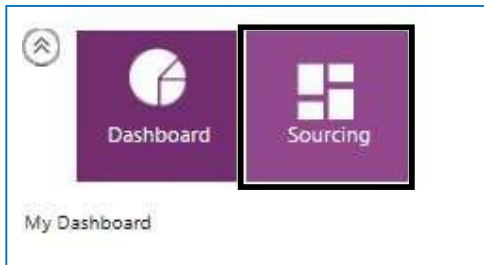


4. The home page is displayed after successful login.



Accessing the procurement event


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

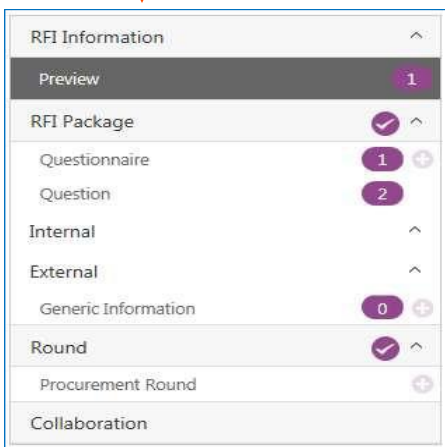
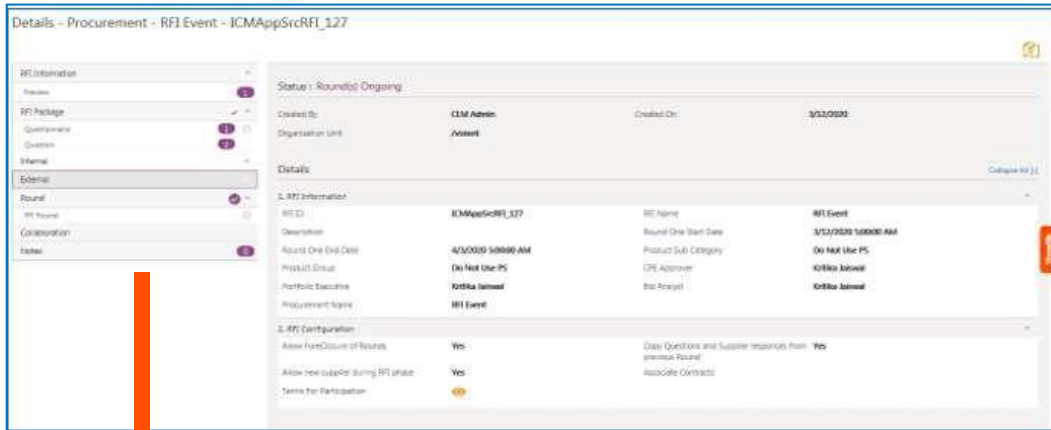


2. After selecting the 'Sourcing' tile, all procurement events are displayed on the grid.

View	Entity Name	Agreement Code	Contract Name	Business Status
	Procurement	ICMAppSrcRFL127	RFI Event	Round(s) Ongoing
	Procurement	ICMAppSrcRFL131	test_Do Not Use PS	Round(s) Closed
	Procurement	ICMAppSrcRFL56	Test	Round(s) Closed
	Procurement	ICMAppSrcRFL158		Round(s) Closed
	Procurement	ICMAppSrcRFL157	RFI Test 01	Round(s) Ongoing
	Procurement	ICMAppSrcRFL156		Round(s) Ongoing
	Procurement	ICMAppSrcRFL59	Base Agreement creation test	Round(s) Closed
	Procurement	ICMAppSrcRFL97	Test_Multiple_Scenario	Round(s) Ongoing

At the bottom of the table, there is a pagination control showing '1 - 8 of 32 items' and a dropdown menu for 'Items Per Page' set to 8.

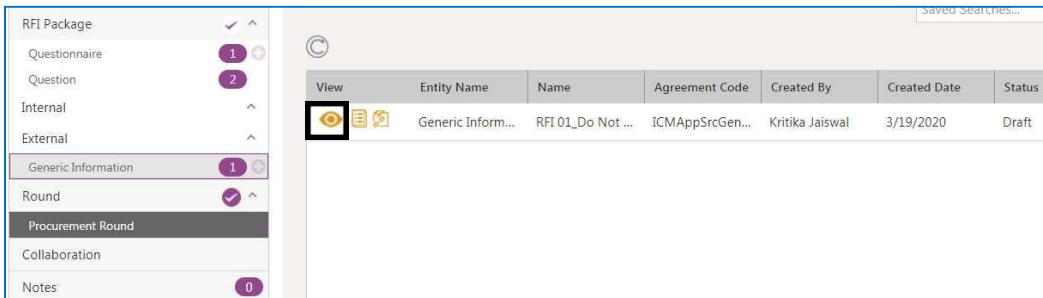
3. Click the 'View' icon  to open the procurement event details page.
4. The procurement details page provides information for the procurement event such as Status, Round Start Date, Round End Date, etc.



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

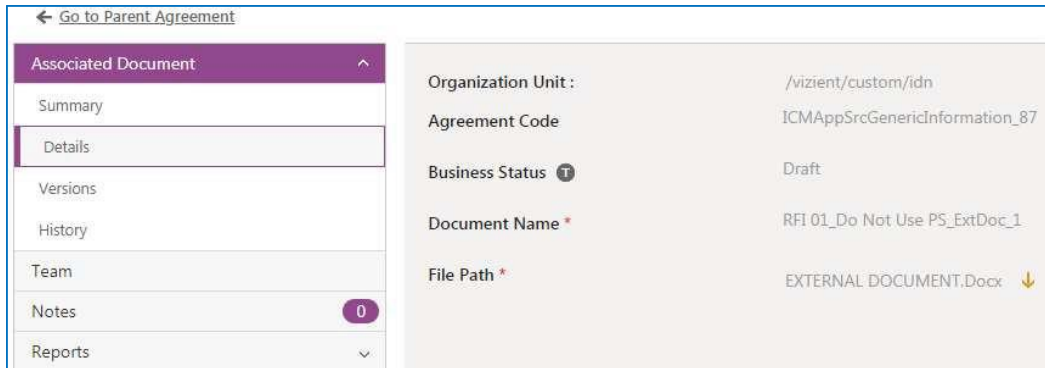
Downloading external attachments

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

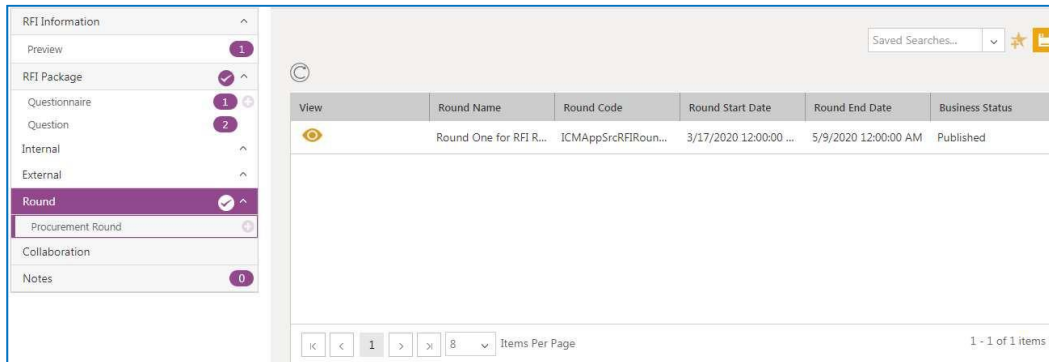


2. Click the 'View' icon  to open the document.

- Click the 'Details' tab on the left panel and 'Download' to download the document.



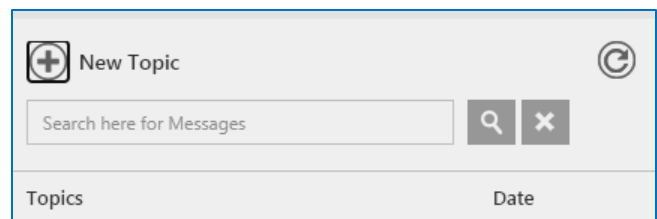
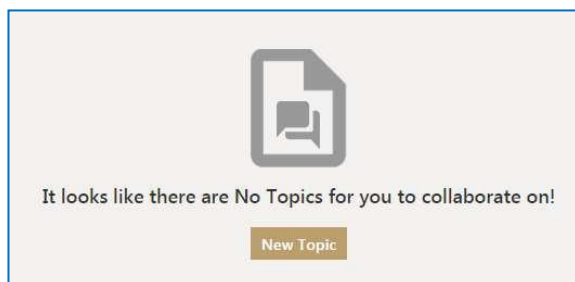
- This section provides the number of procurement rounds created by Vizient for the event. Suppliers are shown only those rounds for which they have been added.



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.

- Using either of the display options below, click on 'New Topic' to begin collaborating.

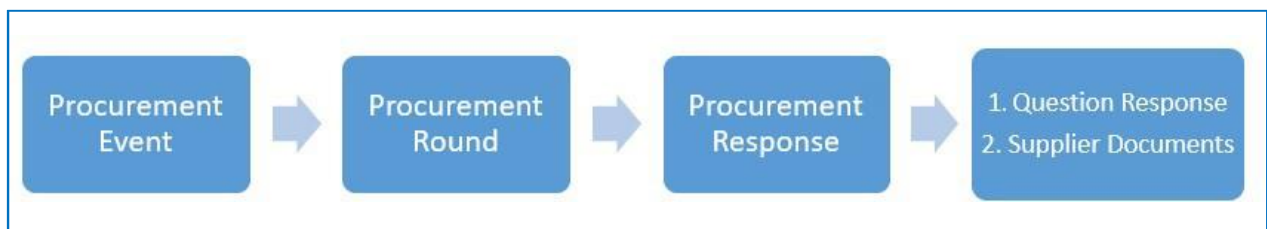


2. Populate the following information:
 - a. Include the subject of discussion and message
 - b. Click 'Select File' to include attachment
 - c. Click on 'Create' to publish the message and attachments to Vizient


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

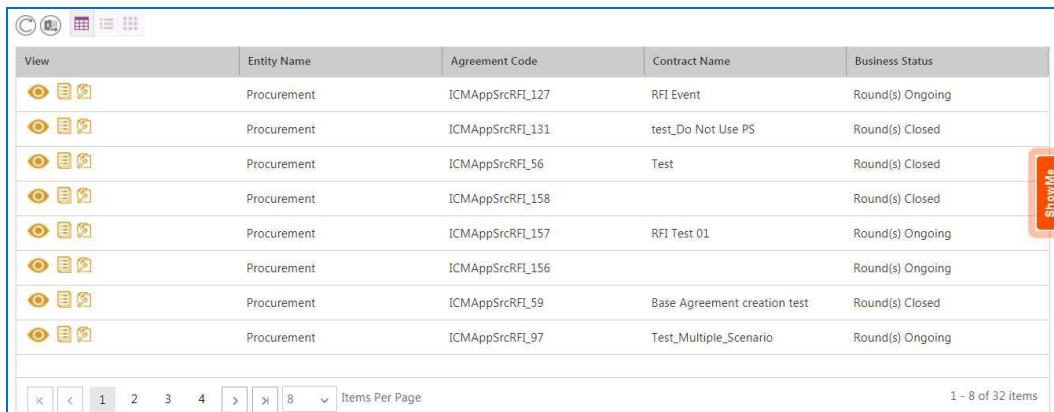
Responding to an event

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



Procurement event

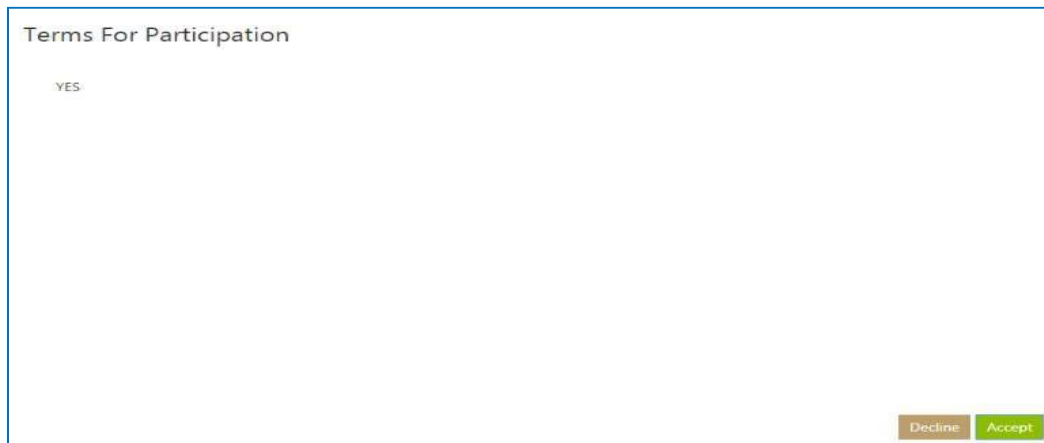
1. Click the 'View' icon  to access the procurement event.



View	Entity Name	Agreement Code	Contract Name	Business Status
	Procurement	ICMAppSrcRFI_127	RFI Event	Round(s) Ongoing
	Procurement	ICMAppSrcRFI_131	test_Do Not Use PS	Round(s) Closed
	Procurement	ICMAppSrcRFI_56	Test	Round(s) Closed
	Procurement	ICMAppSrcRFI_158		Round(s) Closed
	Procurement	ICMAppSrcRFI_157	RFI Test 01	Round(s) Ongoing
	Procurement	ICMAppSrcRFI_156		Round(s) Ongoing
	Procurement	ICMAppSrcRFI_59	Base Agreement creation test	Round(s) Closed
	Procurement	ICMAppSrcRFI_97	Test_Multiple_Scenario	Round(s) Ongoing

1 - 8 of 32 items

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



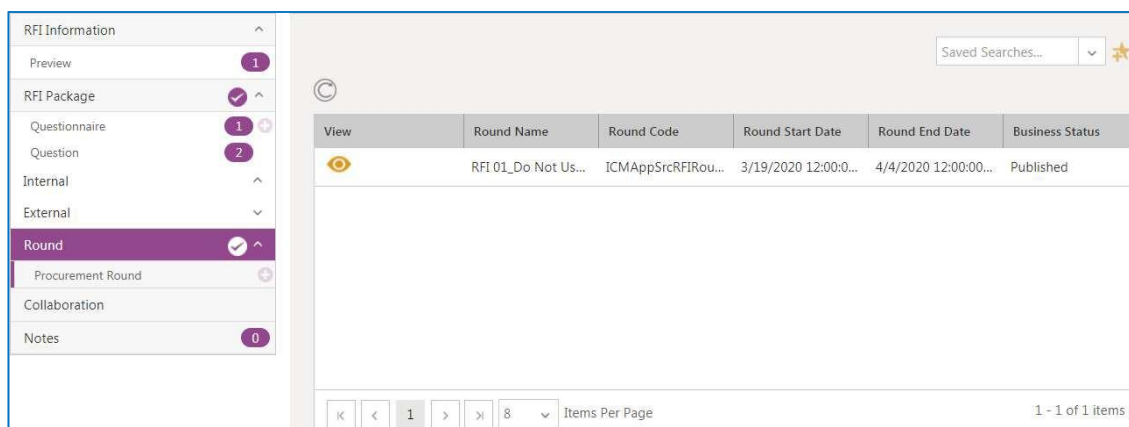
Terms For Participation

YES

Decline Accept


Procurement rounds – View only

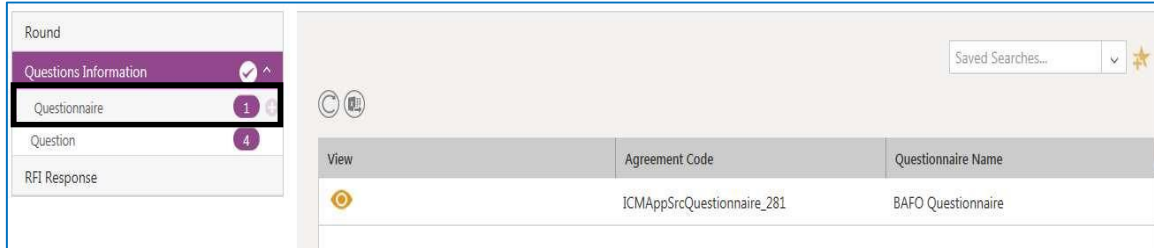
1. After the procurement details page opens, click the 'Round' tab in the left panel. Click the 'Procurement Round' in the round section. The system will display the round that has been created for the event in the grid.



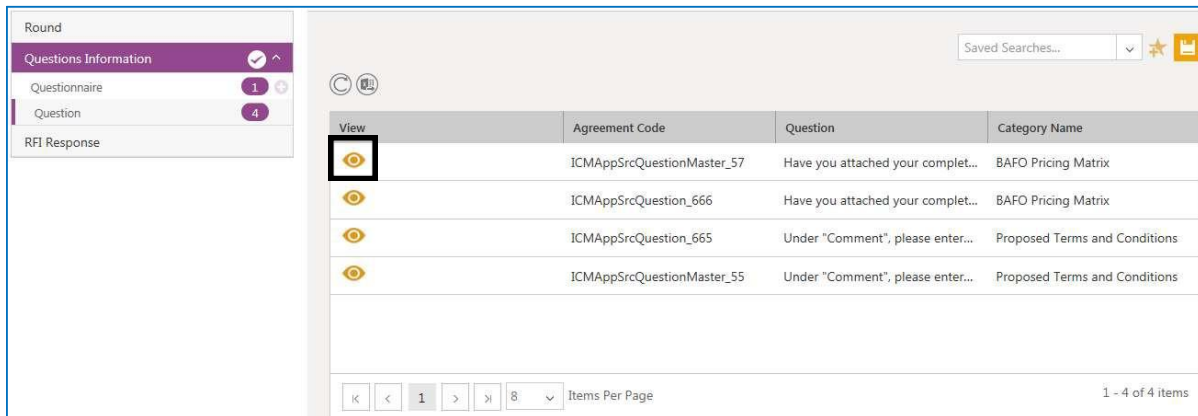
View	Round Name	Round Code	Round Start Date	Round End Date	Business Status
	RFI 01_Do Not Us...	ICMAppSrcRFIRou...	3/19/2020 12:00:0...	4/4/2020 12:00:00...	Published


1 - 1 of 1 items

- Click the 'View' icon  to open the 'Details Procurement Round' page.
- 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**.




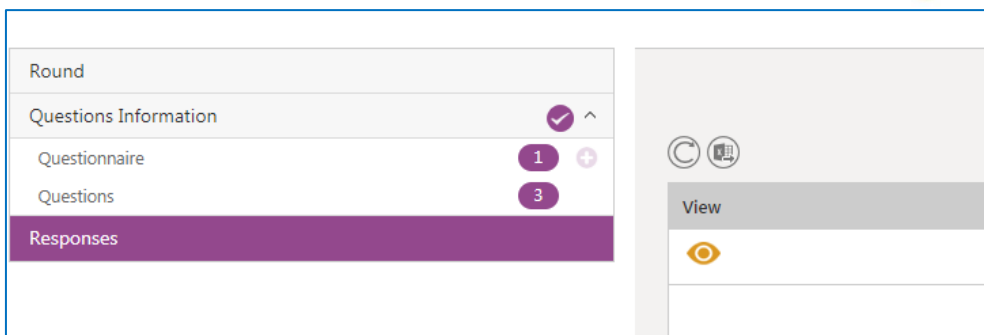
- Click the 'Question' tab on the left panel to view the list of questions requiring responses.



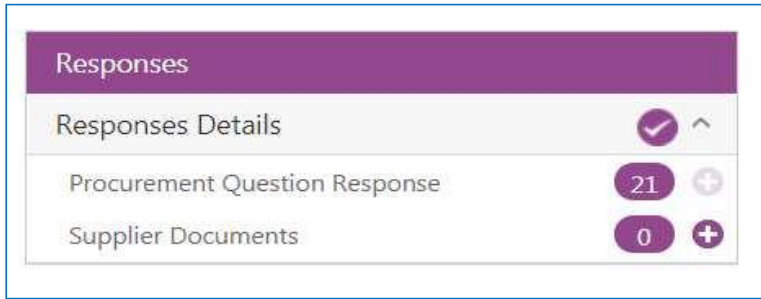
- Click the 'View' icon  to view the entire question and details. The details page in the question round is the same as that in the **procurement event**.

Procurement response – How to respond

- 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 .




- The 'Question Response' and Supplier Documents' tabs are shown in the left panel.

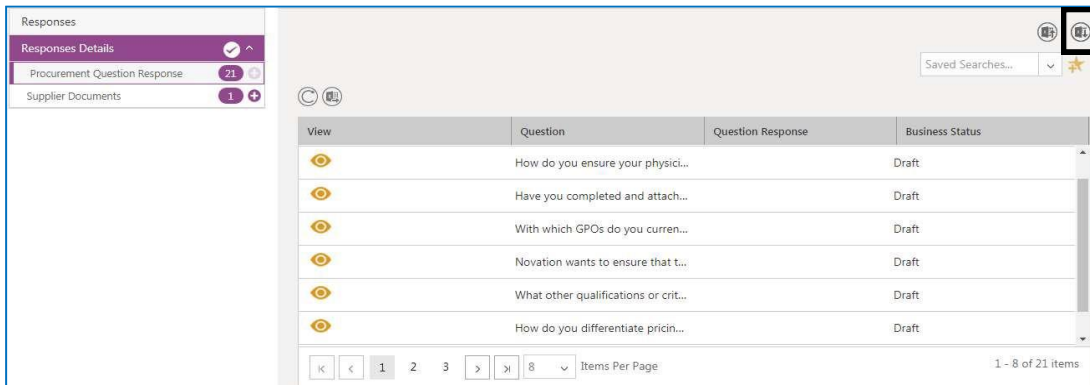


- There are two methods to provide a response:
 - Excel (preferred method)
 - User interface

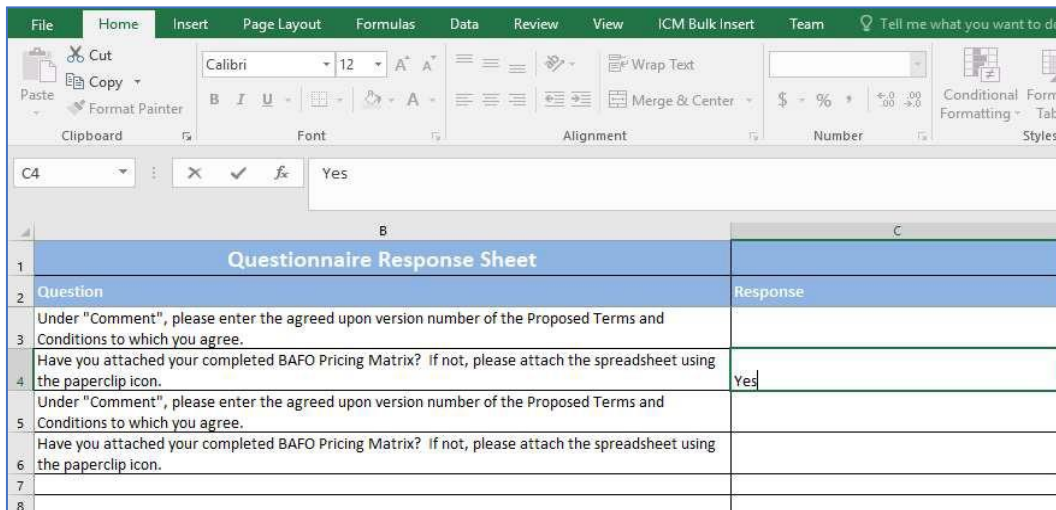
Providing a response through Excel


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

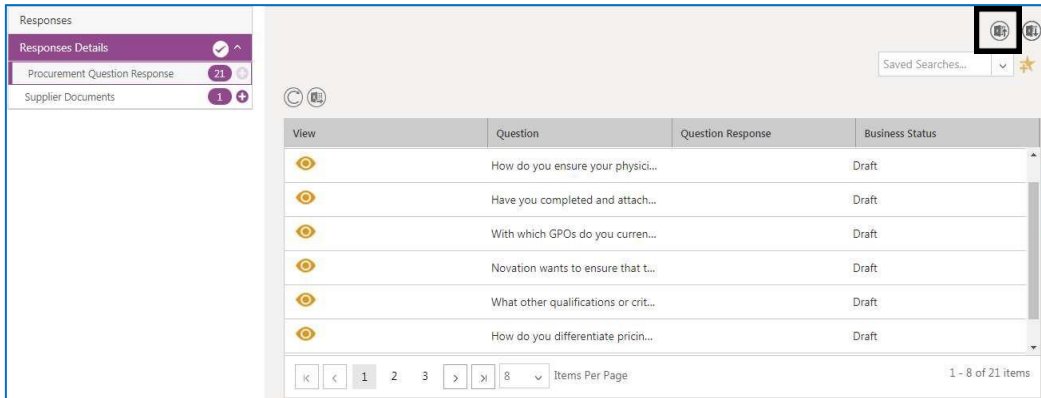
- Click the 'Question Response' tab to view the list of questions in the grid.
- Click the 'Export Excel' icon  located on the top right corner of the grid.



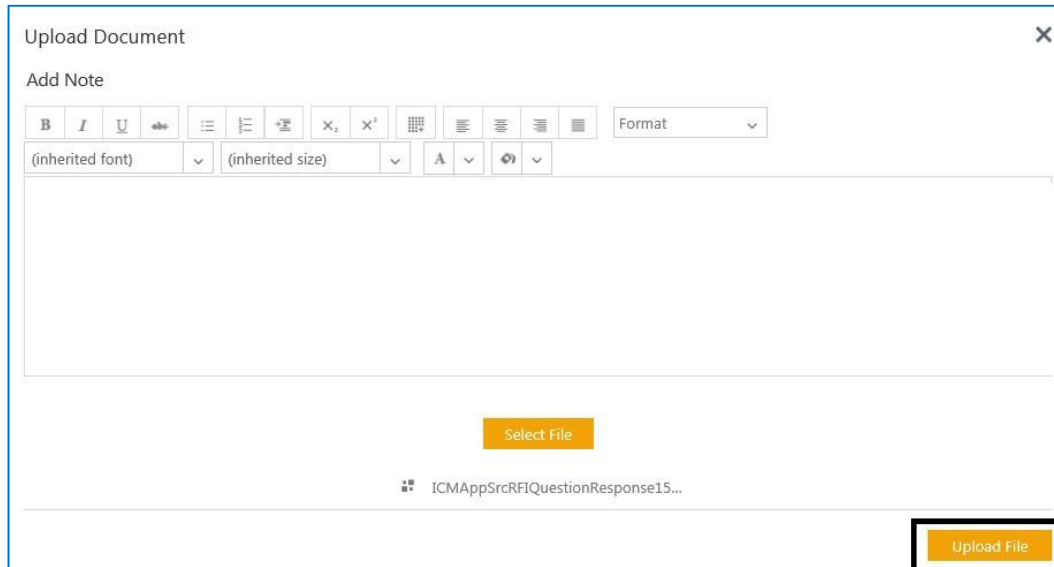
- After selecting the export icon, the Questionnaire Response Sheet downloads.



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.

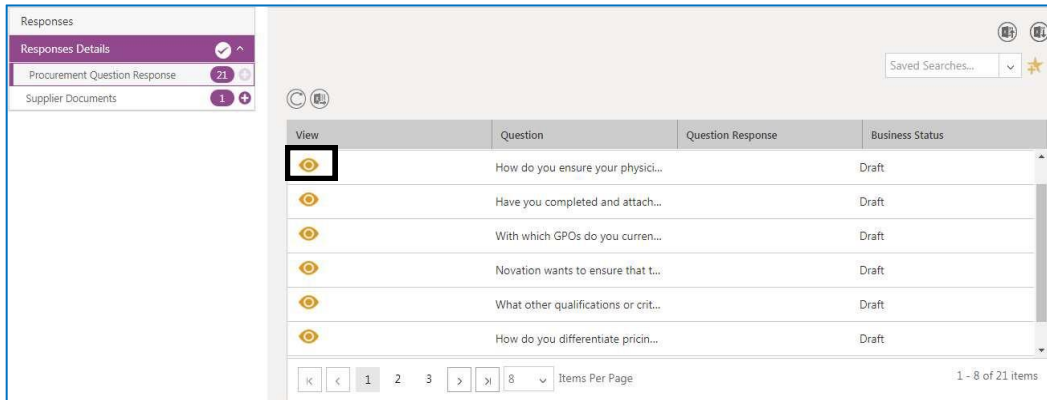


9. The system will validate the file and give the count of: Records Processed, Records Successful, Records Deleted and Records Failed. In case of any error, an error log will also be generated.
10. Click the 'Ok' button to save the responses in the system.







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.

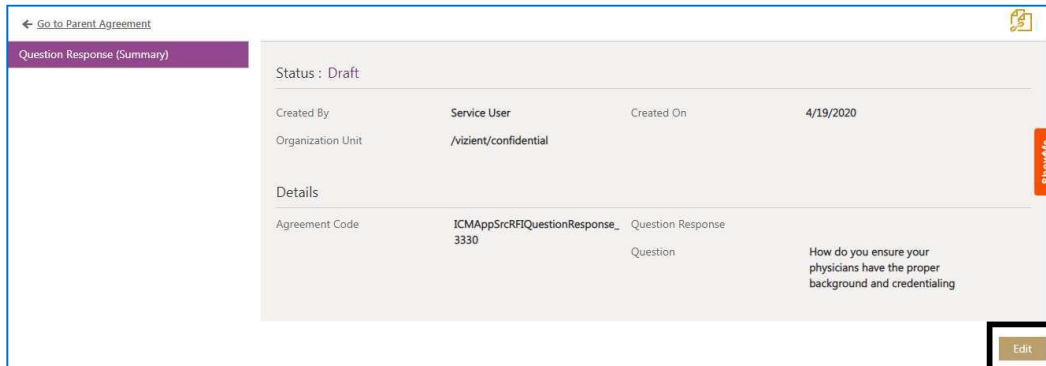
1. Click the 'Question Response' tab to view the list of questions in the grid.
2. Click the 'View' icon  to open the question and provide a response.



The screenshot shows a 'Responses' interface with a sidebar on the left containing 'Responses Details', 'Procurement Question Response' (21), and 'Supplier Documents' (1). The main area displays a table with columns: View, Question, Question Response, and Business Status. The first row is highlighted, and its 'View' icon is circled in red. Below the table is a pagination control showing '1 - 8 of 21 Items' and 'Items Per Page' set to 8.

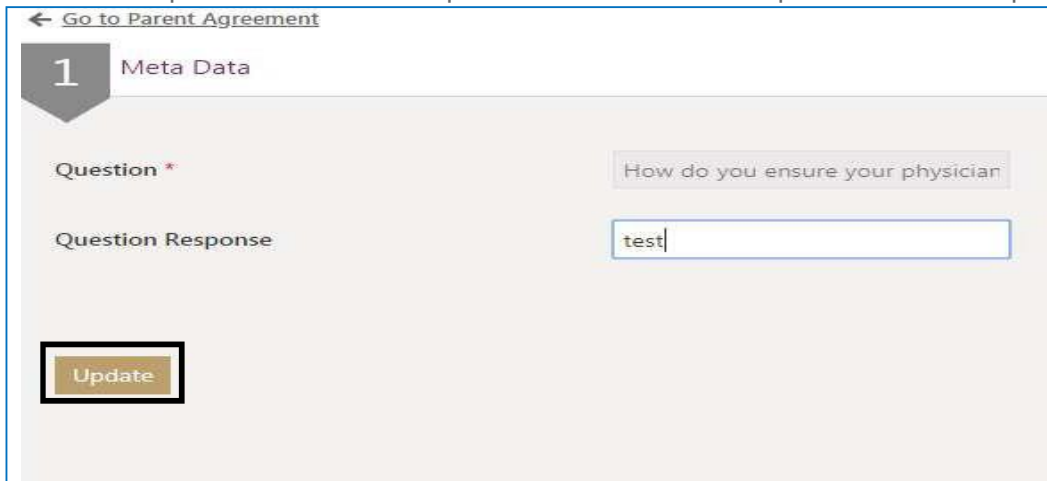
View	Question	Question Response	Business Status
	How do you ensure your physi...		Draft
	Have you completed and attach...		Draft
	With which GPOs do you curren...		Draft
	Novation wants to ensure that t...		Draft
	What other qualifications or crit...		Draft
	How do you differentiate pricin...		Draft

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



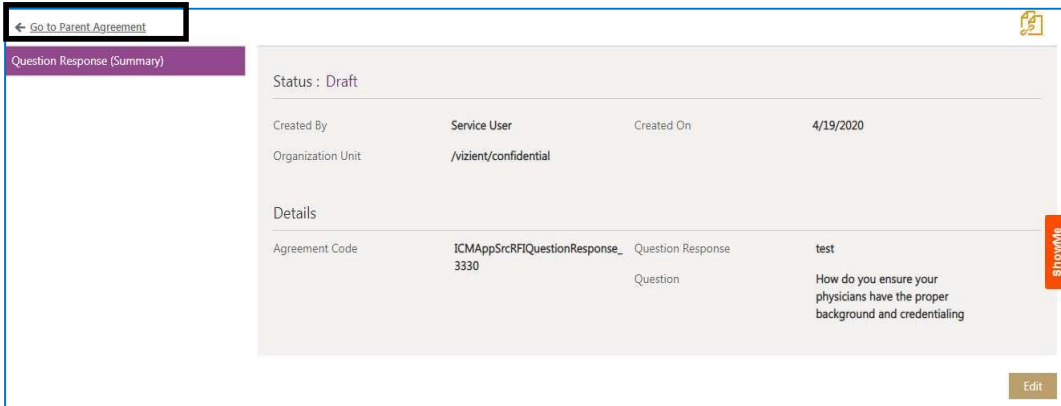
The screenshot shows the 'Question Response (Summary)' page. It includes a breadcrumb 'Go to Parent Agreement', a 'Show Me' button on the right, and a 'Status : Draft' section. Below this is a table with fields: 'Created By' (Service User), 'Created On' (4/19/2020), and 'Organization Unit' (/vizient/confidential). A 'Details' section follows, containing 'Agreement Code' (ICMAppSrcRFIQuestionResponse_3330), 'Question Response' (Question), and the question text: 'How do you ensure your physicians have the proper background and credentialing'. The 'Edit' button at the bottom right is highlighted with a red box.

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

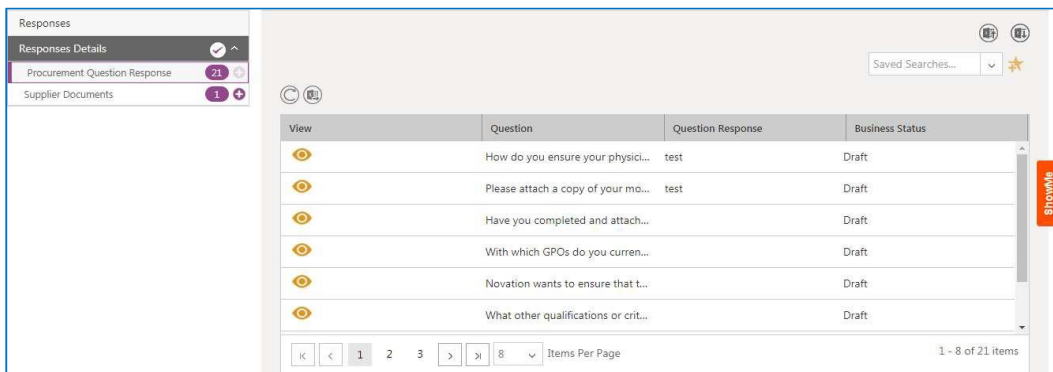



The screenshot shows the 'Question Response' edit form. It has a breadcrumb 'Go to Parent Agreement' and a '1 Meta Data' section. The 'Question *' field contains the text 'How do you ensure your physician'. The 'Question Response' field contains the text 'test'. The 'Update' button at the bottom left is highlighted with a red box.

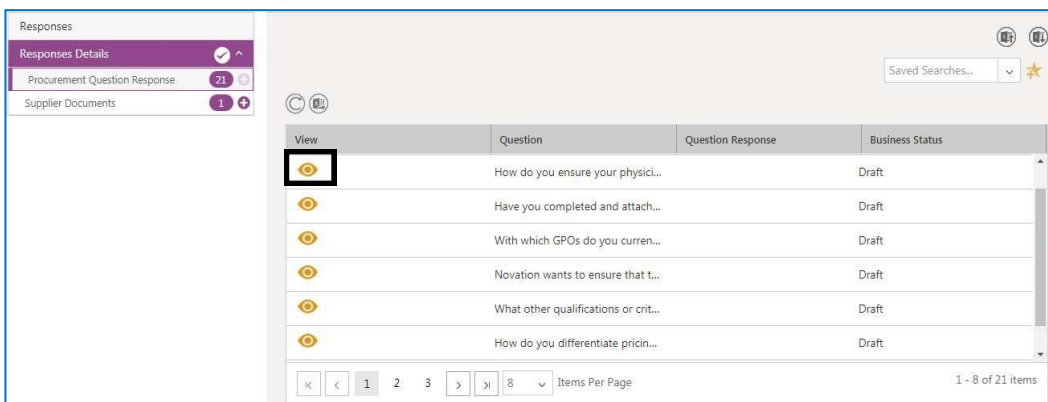
- The response is submitted and is visible in the 'Summary'. To make additional changes, click 'Edit'.
- Click the 'Go to Parent Agreement' option to navigate back to procurement response.



- The list of questions and corresponding responses are provided in the 'Question Response' tab.



- Click the 'Question Response' tab to view the list of questions in the grid.
- Click the 'View' icon  to open the question and provide a response.



10. Once the 'Question Response Summary' opens, click 'Edit'.

← Go to Parent Agreement

Question Response (Summary)

Status : Draft

Created By	Service User	Created On	4/19/2020
Organization Unit	/vizient/confidential		

Details

Agreement Code	ICMAppSrcRFIQuestionResponse_3330	Question Response	How do you ensure your physicians have the proper background and credentialing
		Question	

ShowMe

Edit

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

← Go to Parent Agreement

1 Meta Data

Question * How do you ensure your physician

Question Response test

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.

← Go to Parent Agreement

Question Response (Summary)

Status : Draft

Created By	Service User	Created On	4/19/2020
Organization Unit	/vizient/confidential		

Details

Agreement Code	ICMAppSrcRFIQuestionResponse_3330	Question Response	test
		Question	How do you ensure your physicians have the proper background and credentialing

ShowMe

Edit

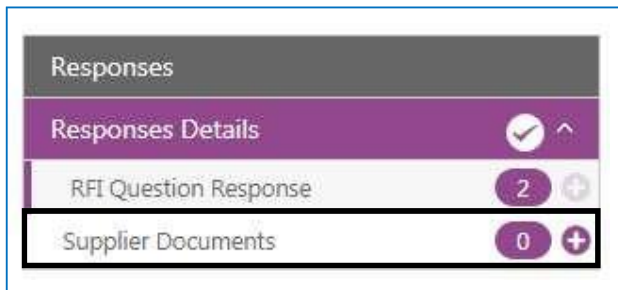
- The list of questions and corresponding responses are provided in the 'Procurement Question Response' tab.

The screenshot shows a web interface with a sidebar on the left containing three tabs: 'Responses Details' (checked), 'Procurement Question Response' (with a '21' badge), and 'Supplier Documents' (with a '1' badge). The main area displays a table with the following columns: 'View', 'Question', 'Question Response', and 'Business Status'. The table contains six rows of data, all with a 'Draft' status. At the bottom of the table, there is a pagination control showing '1 - 8 of 21 items' and a dropdown for 'Items Per Page' set to '8'.

View	Question	Question Response	Business Status
	How do you ensure your physi...	test	Draft
	Please attach a copy of your mo...	test	Draft
	Have you completed and attach...		Draft
	With which GPOs do you curren...		Draft
	Novation wants to ensure that t...		Draft
	What other qualifications or crit...		Draft

Uploading supplier documents

- Add documents, such as pricing sheets, in this section in any of the given file formats: PDF, Excel, Word or image file.
- Click on the '+' sign for the 'Supplier Documents' tab to add attachments.



- The 'Create Association page' is now displayed.

The screenshot shows a form titled 'Create Association - Supplier Documents'. The form has four input fields: 'Business Status' (a dropdown menu with 'Draft' selected), 'Agreement Code' (a text input field), 'Document Name' (a text input field), and 'File Path' (a text input field with a 'Select File' button). Each field has a help icon (a question mark in a circle) to its right.

- Specify the supplier name and document name for the 'Document Name' field.
- Click 'Select File' to choose the document from your local drive and click 'Upload File'.

The screenshot shows the 'Create Association - Supplier Documents' form. The 'Business Status' is set to 'Draft'. The 'Document Name' is 'Demo_IT_Do Not Use PS_R2_RFI SI'. The 'File Path' field is empty, and the 'Select File' button is highlighted in green. The 'Upload File' button is also visible.

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

The screenshot shows the 'Create Association - Supplier Documents' form. The 'File Path' field now contains 'Test Template 1.docx'. The 'Create' button is highlighted in green.

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

Responses	
Responses Details	✓ ^
RFI Question Response	2 +
Supplier Documents	1 +

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

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

The screenshot shows a web interface for a 'Submitted' response. On the left, a sidebar menu includes 'Responses', 'Responses Details' (with a checkmark and up arrow), 'Procurement Question Response' (with a count of 21), and 'Supplier Documents' (with a count of 0). The main content area has a 'Status' field set to 'Submitted'. Below this, it shows 'Created By: Service User' and 'Created On: 4/23/2020'. The 'Organization Unit' is '/vizient/confidential'. A 'Details' section contains two rows: 'Agreement Code: ICMAppSrcRFIResponse_1000' with 'Response Name: Doc_Accounts Payable Audit and Recovery Services_R1_RFI Stage_Baxter International Inc_Response', and 'Supplier Code: Supplier_01' with 'Supplier Name: Baxter International Inc.'. At the bottom right, there are three buttons: 'View Procurement Round', 'View Procurement', and 'Withdraw'. A vertical 'Show Me' button is on the right edge.

Withdraw response

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

The screenshot shows a web interface for a 'Withdrawn' response. The sidebar menu is identical to the 'Submitted' page. The main content area has a 'Status' field set to 'Withdrawn'. Below this, it shows 'Created By: Service User' and 'Created On: 4/23/2020'. The 'Organization Unit' is '/vizient/confidential'. A 'Details' section contains two rows: 'Agreement Code: ICMAppSrcRFIResponse_1000' with 'Response Name: Doc_Accounts Payable Audit and Recovery Services_R1_RFI Stage_Baxter International Inc_Response', and 'Supplier Code: Supplier_01' with 'Supplier Name: Baxter International Inc.'. At the bottom right, there are three buttons: 'View Procurement Round', 'View Procurement', and 'Revert Withdraw'. A vertical 'Show Me' button is on the right edge.

Revert withdraw

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

The screenshot shows a web interface for a procurement response. The status is 'Draft', highlighted with a black box. The interface includes a sidebar with 'Responses Details', 'Procurement Question Response' (21), and 'Supplier Documents' (0). The main content area displays the following information:

Status	Draft		
Created By	Service User	Created On	4/23/2020
Organization Unit	/vizient/confidential		
Details			
Agreement Code	ICMAppSrcRFIResponse_1000	Response Name	Doc_Accounts Payable Audit and Recovery Services_R1_RFI Stage_Baxter International Inc_Response
Supplier Code	Supplier_01	Supplier Name	Baxter International Inc.

At the bottom right, there are buttons for 'Submit', 'Cancel Procurement Response', 'Show less ^', 'View Procurement Round', and 'View Procurement'. A vertical 'Show Me' button is on the right edge.

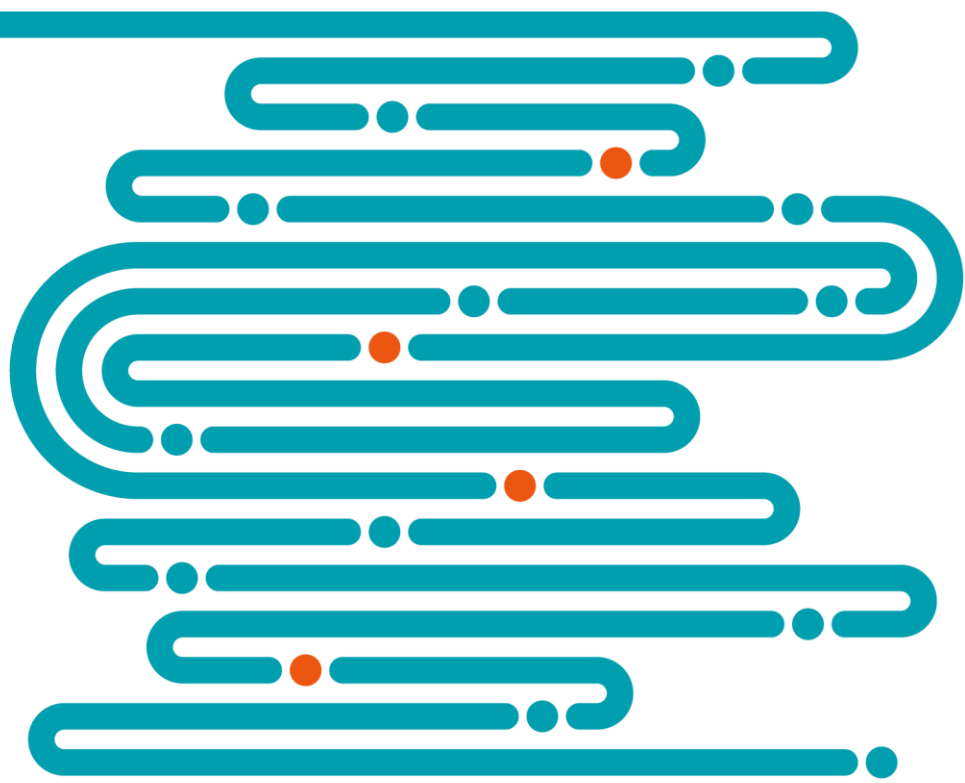
Cancel response

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

The screenshot shows a web interface for a procurement response. The status is 'Withdrawn', highlighted with a black box. The interface includes a sidebar with 'Responses Details', 'Procurement Question Response' (21), and 'Supplier Documents' (0). The main content area displays the following information:

Status	Withdrawn		
Created By	Service User	Created On	4/23/2020
Organization Unit	/vizient/confidential		
Details			
Agreement Code	ICMAppSrcRFIResponse_1000	Response Name	Doc_Accounts Payable Audit and Recovery Services_R1_RFI Stage_Baxter International Inc_Response
Supplier Code	Supplier_01	Supplier Name	Baxter International Inc.

At the bottom right, there are buttons for 'View Procurement Round', 'View Procurement', and 'Revert Withdraw'. A vertical 'Show Me' button is on the right edge.



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or viziensupport@vizientinc.com.

As the nation's largest member-driven health care performance improvement company, Vizient provides solutions and services that empower members to deliver high-value care by aligning cost and quality in the critical areas of clinical, operational, and supply chain performance.