Training Exercises

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I. Viewing RFP/Q Email Invitation from Buyer

**Note:** The email invitation screenshot below is an example and does not reflect the actual language that will display in the real email invitation.

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**Context:** Clone_AJ_Water based Lubricant T03 - GHSC/PSM/TO3/CC6/2016/4 RFP

**From:** Source GHSC-PSM

Context: Clone_AJ_Water based Lubricant T03 - GHSC/PSM/TO3/CC6/2016/4 RFP
Source GHSC-PSM from organization emporis sent you the following message:

**Body:**
You have been invited to participate in the following event: RFP Clone_AJ_Water based Lubricant T03 - GHSC/PSM/TO3/CC6/2016/4
Please follow the instructions below to access the event:-
1. Logon to GHSC - PSM Sourcing
   i. Enter your user name in the Name field.
   ii. Enter your password in the Password field.
   iii. Click the Login button.
2. From the main menu select Bids > View RFx(s).
3. Locate the RFx Name in the list of RFx(s).
4. Click the RFx Name link to view the RFx.

Please do not hesitate to contact Ajith Ajjaranii for further information.

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Please Login to https://chemonicsssm.emporis.com?kindOfAuth=Internal to reply to this message.
Please do NOT reply to this email as it is system generated with an unmonitored mailbox

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II. Logging in to ARTMIS Sourcing

Step 1: Login to the ARTMIS Sourcing Application with username and password, and then select Log in.

Note: This URL link is an ARTMIS test environment. The production environment will use a different URL:

Note: Username is not case-sensitive. Password is case-sensitive.

Note: You will not be able to login after five unsuccessful attempts.
II. Logging in to ARTMIS Sourcing

**Note:** If you do not remember your username, select the **Forgot Username?** link. If you do not remember your password, select the **Forgot Password?** link.
II. Logging in to ARTMIS Sourcing (cont.)

Step 2: Review Terms Of Use and then select Accept.

Note: If a time zone pop-up window appears, select the OK button to close the window.
II. Logging in to ARTMIS Sourcing (cont.)

**Step 3:** The GHSC-PSM Sourcing Home screen is displayed. Verify that the upper left area displays **GHSC – PSM Sourcing**.

**Note:** If it displays another value, select the drop-down menu to open another window, and then select **GHSC-PSM Sourcing**.
Il a. Updating Application Preferences

**Step 1:** Navigate to the upper-right hand area and verify that registered name for the username is displayed.

**Step 2:** Select the drop-down menu and select **Preferences** to open the Edit Preferences window.
II a. Updating Application Preferences

**Step 3:** Navigate to the Defaults section and update the Time Zone field so that it matches the desktop time-zone information.

**Note:** Updates to the security answer and security question can be updated in the Security Question section.

**Step 4:** Select **OK** to save updates made on the Edit Preferences screen.
II a. Updating Application Preferences

**Step 5:** Select the drop-down menu to open another window, and then select **GHSC-PSM Sourcing** to return to the GHSC-PSM Sourcing screen.
III. Viewing an RFP/Q

Step 1: Select the **RFx Name** link or the **View/Respond to RFx** button to open the RFP/Q.
IV. Accepting an RFP/Q Invitation

**Step 1:** Select the **Accept** button to open the Accept Invitation pop-up window.

**Step 2:** Select the checkbox for “**By checking this box, I confirm that my company complies with the Terms and Conditions.**”

**Step 3:** Select the **OK** button to confirm acceptance and to close the Accept Invitation window.
VI. Responding to a Questionnaire

Step 1: Select the Questionnaires tab.

Step 2: Select the plus icon for the first questionnaire to expand the section.
V. Responding to a Questionnaire (cont.)

**Step 3:** Navigate to the Attachments column marked with the paperclip icon column header.

**Step 4:** Check if a paper clip icon associated with the question has a number next to it. This indicates that an attachment has been included for the questionnaire/question.
V. Responding to a Questionnaire (cont.)

**Step 5:** Select the **Place Response** button to review the first questionnaire. This will open the Create Response RFP window.
V. Responding to a Questionnaire (cont.)

**Step 6:** On the Create Response window, review the question(s).

**Note:** Questions will state if an attached document needs to be reviewed before answering the question.

**Step 7:** To view the attached document, select the **Close** button to return to the Questionnaire tab.
V. Responding to a Questionnaire (cont.)

**Step 8:** Select the paperclip icon to open the View Attachment window.

**Step 9:** Select the link from the Content column to open the Virus Scan Results window.
V. Responding to a Questionnaire (cont.)

Step 10: Select the **Download** button.

Step 11: Select the **drop-down** icon, and then select the **Save and open** option.

**Note:** The attachment is automatically saved in the default downloads folder. Another window will display the status of the download.

**Note:** Close the Virus Scan Results and View Attachment windows once the download is complete.
V. Responding to a Questionnaire (cont.)

Step 12: After reviewing the attachment, return to the Questionnaires tab.
Step 13: Select the Place Response button for the questionnaire that required reviewing an attachment.
V. Responding to a Questionnaire (cont.)

**Step 14:** Review the question(s) again (as needed), and then select and/or enter answers to the question(s).

**Step 15:** Select the **Save** button and confirm that the “Changes Saved Successfully” message is displayed.

**Step 16:** Select the **Close** button to return to the Questionnaire screen.
V. Responding to a Questionnaire (cont.)

Note: A “Revise Response” button replaces the “Place Response” button for a Questionnaire where an answer was provided.

Step 17: Repeat steps 2 – 16 and respond to the other Section questions.
V a. Responding to Questionnaire – Exporting All RFP/Q Attachments

A sourcing event may have more than one attachments that are found in specific questionnaire sections. The functionality to export all questionnaire attachments is available.

**Step 1:** Navigate to the top area of the RFx event and select **RFx Attachments (x)** where “x” indicates the number of available attachments.
V a. Responding to Questionnaire – Exporting All RFP/Q Attachments

Step 2: From the Attachments window, use the horizontal scrollbar (if needed) to navigate to the right area.

Step 3: Select the checkbox with green checkmarks to select all the items in the list and then select Export to open the Export Data Utilities pop-up window.

Step 4: From the Export Data Utilities window, retain or change the file name in the File Name field.

Step 5: Keep the default selection for the Group Attachment by radio buttons and then select Export.
V a. Responding to Questionnaire – Exporting All RFP/Q Attachments

**Step 6:** From the Data Manager Utilities window, select the **Refresh** button to update the status of the export from “Running” to “Done – Click here to download results.”

**Step 7:** Select **Done – Click here to download results** and then select the drop-down arrow next to **Save** and select **Save as**.

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V a. Responding to Questionnaire – Exporting All RFP/Q Attachments

Step 8: Verify that the .zip file has the desired file name and then select **Save**. **Note:** The attachment is saved in the default downloads folder, unless another folder destination was selected.

![Image showing the save dialog box with the file name set to RFP-Q Attachments and save button highlighted.]

Step 9: Another pop-up window on the bottom of the screen will display stating that the download is complete. Select **Open folder** to open the folder where the attachments were saved.

![Image showing the pop-up window with the message The RFP-Q Attachments.zip download has completed, and the open folder button highlighted.]

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V a. Responding to Questionnaire – Exporting All RFP/Q Attachments

**Step 10:** Verify that the .zip file has the desired file name and then select **Save**.

**Note:** The attachment is saved in the default downloads folder, unless another folder destination was selected.

**Step 11:** Right-click on the .zip file to open a menu, and then select **Extract All**.

**Step 12:** Select **Browse** to create a new folder where the attachments will be extracted.
V a. Responding to Questionnaire – Exporting All RFP/Q Attachments

Step 13: Select a location on your desktop and select **Make New Folder**.

Step 14: Enter a name for the new folder and then select **OK**.

Step 15: Verify the name of the folder displays in the “Files will be extracted to this folder” field and then select **Extract**.

[Image of a Windows Explorer window with options to make a new folder and select a destination, and another image showing the Extract Compressed (Zipped) Folders window with the path C:\RFP-Q Extracted Attachments and the Extract button highlighted.]
V a. Responding to Questionnaire – Exporting All RFP/Q Attachments

Step 16: To open the attachments, navigate to the desktop folder where the documents were saved.

Step 17: Double-click on the folder item to open the folder. A Questionnaires folder will display.

Step 18: Double-click the Questionnaires folder to open items in that folder. There will be folders indicating the RFP/Q event sections that has an attachment to review. Continue to open each individual folder until an actual document is available for you to open and view.
VI. Responding to a Questionnaire - Upload Attachment with Response

**Note:** An RFP/Q questionnaire may require a document to be attached as part of a response to a question, for example, a registration certification.

**Step 1:** Select the **plus** icon to expand the desired questionnaire section.
VI. Responding to a Questionnaire - Upload Attachment with Response (cont.)

Step 2: Select the **Place Response** button (Section 5 for this exercise) to open the Create Response window.
VI. Responding to a Questionnaire - Upload Attachment with Response (cont.)

Step 3: Review the question(s) in the questionnaire for language that states an attachment is required.

![RFP Create Response](image)

Create Response

Context
RFP Name: RFX Event - Supplier Training
Questionnaire Name: Section 5:
Required Certifications
Questionnaire Description: SECTION 5: REQUIRED CERTIFICATIONS

Create Response(s) (cont.)

The following Representations and Certifications must be completed and submitted with the proposal along with the detailed requirements and documents indicated under the RFQ instructions to Offerors. Non-adherence to these requirements may result in disqualification.

SECTION 5.1. CERTIFICATE OF INDEPENDENT PRICE DETERMINATION

CERTIFICATE OF INDEPENDENT PRICE DETERMINATION

*SECTION 5-1a).

Name of Offeror - (hereinafter called the "Offeror")

SECTION 5-1b).

(a) The offeror certifies that—

(1) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror or competitor relating to—

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VI. Responding to a Questionnaire - Upload Attachment with Response (cont.)

**Step 4:** Prepare any required documentation that needs to be uploaded, then navigate back to the RFP/Q that requires an attachment.

**Step 5:** Open the questionnaire/question that requires the attachment.

**Step 6:** Select the paper clip icon for the specific question that requires the response.
VI. Responding to a Questionnaire - Upload Attachment with Response (cont.)

Step 7: Select the **Add** button to open additional fields in the Attachments window.

Step 8: Enter a **Name** for the attachment in the Name field.

**Note:** The Name field is limited to 50 characters.

Step 9: Select the **Browse** button to locate the document to attach.
VI. Responding to a Questionnaire - Upload Attachment with Response (cont.)

**Step 10:** Select the document to upload, and then select the **Open** button.

**Step 11:** Confirm that the Attach Content field is populated, and then select the **Save** button.
VI. Responding to Questionnaire - Upload Attachment with Response (cont.)

**Step 12:** Confirm (and review as desired) that the uploaded document displays in the Content column.

**Step 13:** Select the **Close** button to return to the Create Response window.

**Step 14:** Confirm that the paperclip icon displays the correct number of uploaded documents.

![Image of RFP Attachments and Create Response windows with highlighted steps and icons]
VI. Responding to Questionnaire - Upload Attachment with Response (cont.)

**Step 15:** Provide responses for the rest of the questions, and then select the **Save** button.

**Step 16:** Select the **Close** button to return to the RFP/Q screen.
VI. Responding to Questionnaire - Upload Attachment with Response (cont.)

Note: A “Revise Response” button replaces the “Place Response” button for the question where an answer was provided.
VII. Placing a Single Bid

Step 1: From the accepted RFP/Q screen, select the SingleBid tab, and then select the Place New Bid button to open the Create Bids window.
VII. Placing a Single Bid (cont.)

**Step 2:** Enter a value in the fields displayed, for example, **Minimum Quantity**, **Maximum Quantity**, and **Price Per Unit**.

**Note:** Do not enter dollar signs when entering information for currency.

**Step 3:** Select **Save**.

**Step 4:** Select **OK** from the pop-up window to submit the bid.
VII. Placing a Single Bid (cont.)

Step 5: Confirm that changes were successfully saved, and then select the **Close** button.
VII. Placing a Single Bid (cont.)

Step 6: The “Revise Bids/History” button now appears in the Bid Revision column. Select the Revise Bids/History button to view the submitted bid.

Step 7 (optional): Select the Revise Bid button to review all of the submitted bid information.

Note: The View Bids screen only displays the information entered in the Price Per Unit (USD) and Maximum Quantity bid fields.

Step 8: Select Close to return to the RFP/Q screen.
VIII. Viewing a Received Message

Step 1: From an RFP/Q screen, select the RFx Messages (X) link above the Questionnaire section.

Note: The number displayed in the link indicates the number of available messages in the RFP/Q.
VIII. Viewing Received Message (cont.)

**Step 2:** Select the **Received Message (X)** tab.

**Step 3:** Select the desired **Subject Line** link to open the View Message window.
VIII. Viewing Received Message (cont.)

Step 4: Review the message.

Step 5: (as needed): Select the Attachments (X) link to open and view attachments linked to the email.
VIII. Viewing Received Message (cont.)

**Step 6:** Select the **Close** button to return to the View by RFx Messages window.

**Step 7:** Select the **Close** button on the View by RFx Messages window to return to the RFP/Q screen.
IX. Creating and Sending a Message

**Note:** The RFx messaging function is available to use. Please reach out to the client on the preferred method of communication.

**Step 1:** From an RFP/Q screen, select the **RFx Messages (X)** link above the Questionnaire section.

**Note:** The number displayed in the link indicates the number of available messages in the RFP/Q.
IX. Creating and Sending a Message (cont.)

**Step 2:** Select the **Received Message (X)** tab.

**Step 3:** Select the **Create** button to open the Create Message pop-up window.
**IX. Creating and Sending a Message (cont.)**

**Step 4:** Select the **Please Select** button to select recipient of message.

**Step 5:** Select the desired recipient from the “Select from” box and then select the right arrow icon to populate the recipient’s name in the “Selected” box.

**Step 6:** Select the **OK** button to return to the Create Message window.
IX. Creating and Sending a Message (cont.)

**Step 7:** Enter information in the *Subject* and *Message* text fields.

**Step 8:** Select **Send** to return to the View by RFx Messages window.
IX. Creating and Sending a Message (cont.)

**Step 9:** Select the **Sent Messages** tab to view the sent message.
**Step 10:** Select **Close** to return to the RFP/Q screen.
Questions?
Thank you!
Appendix

A. Declining an RFP/Q Invite
B. Placing an Offline Bid
C. Importing Offline Bids
A. Declining an RFP/Q Invitation

**Step 1:** Select the **Decline** button to open the Decline Invitation pop-up window.

**Step 2:** Enter comments in the text box, and then select the **OK** button.

**Note:** The RFP/Q will be removed from the View RFx(s) Bids list.
B. Placing an Offline Bid

**Note:** It is important that you complete your Questionnaire responses if you will use the “Respond Offline” feature to place your bids. This feature will export the Questionnaire and SingleBid tabs in an Excel spreadsheet in their respective sheets. When you are ready to import your bid responses, the system will also look in the Excel file Questionnaire tab and verify that you have completed the questions. You will not be able to import the offline bid document unless all the questions in this tab are completed.

**Step 1:** From an RFx, select the **SingleBid** tab.

**Step 2:** Select the **Respond Offline** button.
B. Placing an Offline Bid (cont).

Step 3: On the Respond Offline window, select the **Download offline bidding template** option, and then select the **OK** button.

Step 4: Select **XLSX** as the file type option, and then select the **Export** button.
B. Placing an Offline Bid (cont).

**Step 5:** From the Data Manager Utilities window, select the **Refresh** icon to refresh the Status column.

**Step 6:** Select the **Done – Click here to download results** link.
B. Placing an Offline Bid (cont).

**Step 7:** An alert will display at the bottom of the Data Manager Utilities window. Select the **drop-down** icon, and then select the **Save and open** option. An Excel workbook will automatically open.

**Note:** The file is automatically saved in the default downloads folder.

**Step 8:** Select the **Enable Editing** button.
B. Placing an Offline Bid (cont).

Step 9: Select the Bid_RFP tab.
B. Placing an Offline Bid (cont).

**Step 10:** Provide information for the bid in the designated columns.

**Note:** Required fields are marked with an asterisk.

**Step 11:** Save the file.

<table>
<thead>
<tr>
<th>Bids</th>
<th>Minimum Quantity</th>
<th>*Maximum Quantity</th>
<th>*Price Per Unit (USU)</th>
<th>*Validity of Offer - Number of Days</th>
<th>*Name of the Manufacturer</th>
<th>*Manufacturer Site</th>
<th>*Regulatory Body</th>
<th>*US FDA 510(k)</th>
<th>*Production Lead Time for Sampling</th>
<th>*Country of Origin and Manufacturer Sites</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>250000</td>
<td>350000</td>
<td>56</td>
<td>Training</td>
<td>Thailand</td>
<td>Training</td>
<td>Training</td>
<td>Training</td>
<td>45</td>
<td>Training</td>
</tr>
</tbody>
</table>
C. Importing Offline Bids

**Step 1:** Login and verify that you are on the View RFx(s) Home screen.

**Step 2:** Select the **View/Respond to RFx** button for the sourcing event that requires the offline bid.

**Step 3:** Navigate to the **SingleBid** tab and select the **Respond Offline** button.
C. Importing Offline Bids (cont).

**Step 4:** On the Respond Offline dialog box, select the **Import Bids** option, and then select the **OK** button to open the Import Data Utilities pop-up window.
C. Importing Offline Bids (cont).

**Step 5:** Select **XLS/XLSX** as the file type, and then select **Browse** to locate and upload the Excel workbook from your desktop.

**Step 6:** Select **Import**.

![Image of Import Data utility with file selection and import options highlighted]
C. Importing Offline Bids (cont).

**Step 7:** Select the **Refresh** button from the Data Manager Utilities pop-up window and verify that the Status column displays “Done.”
C. Importing Offline Bids (cont).

**Step 8:** Navigate back to the sourcing event Single Bid tab and select **Revise Bids/History** to open the View Bids window. This will allow you to verify that your bids for every item (new or updated) were imported from the desktop.

**Step 9:** Verify that the imported bid(s) are displayed in the View Bids window.

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