ACCESSING VENDOR PORTAL
RESPONDING TO AN RFx
Table of Contents

You have received an invitation to participate in an RFx ................................................................. 3
How are you notified? ............................................................................................................................ 3
Who can access? .................................................................................................................................. 3
Accessing the RFx? .............................................................................................................................. 3
Proposal progress status and action to be performed? ................................................................. 3
Contents of an RFx folder ..................................................................................................................... 4
Before you reply .................................................................................................................................... 5
Reviewing the RFx before acknowledging participation ............................................................. 5
Acknowledging receipt and participation ......................................................................................... 5
Giving access to the RFx to other users from your company .......................................................... 6
  Selecting an existing contact ............................................................................................................... 7
  Creating a new contact ....................................................................................................................... 7
  Removing a contact from the RFx team ............................................................................................. 7
Discussions (clarifications, inquiries, etc.) .......................................................................................... 7
  Creating a message ............................................................................................................................ 7
  Reading a message .......................................................................................................................... 8
  Replying to or forwarding a message .............................................................................................. 9
Preparing a response to an RFx ........................................................................................................... 11
  Creating a new response .................................................................................................................. 11
  Quoting ........................................................................................................................................... 12
  Quoting in MS Excel ....................................................................................................................... 13
  Adding attachments ......................................................................................................................... 13
  Responding to the Procurement Specialist’s questionnaire ....................................................... 15
    Responding directly in the displayed form .................................................................................... 15
    Responding in MS Excel ............................................................................................................... 15
Submitting your response to the Procurement Specialist .............................................................. 16
  Validating and submitting a response to the Procurement Specialist ....................................... 16
  Viewing the responses’ history ....................................................................................................... 16
  Procurement Specialist’s acknowledgement of receipt ............................................................ 17
  Submitting a different response or replacing a validated response ........................................... 17
  Creating a new response based on a previous one ..................................................................... 18
List of Client RFx’s .............................................................................................................................. 20
Accessing ARTMIS Vendor Portal
Responding to an RFx

Accessing RFx’s..........................................................20
Becoming familiar with the interface ........................................20
Searching for an RFx.......................................................21
You have received an invitation to participate in an RFx

How are you notified?
When a Procurement Specialist invites a supplier to participate in a request for quote/proposal, an email notification is sent to the supplier contacts selected by the Procurement Specialist.

In addition, on the selected contacts home page, a new entry will be queued in the Manage Proposals page.

Who can access?
At first, only the contacts selected as recipients when sending out the RFx may access it; however, these contacts can later add colleagues to the RFx team, allowing them to access and respond to the RFx.

Accessing the RFx?
You can access an RFx in one of three ways:

- Email invitation to participate: Select the link provided in the email message.
- Main navigation: Select the menu Sourcing / Manage proposals and select the label of the RFx or its Edit icon to open.
- RFx in Progress frame on home page: Select the circle to open the Manage Proposal screen.

Proposal progress status and action to be performed?
The table below shows how the various proposal progress statuses and their associated visual cues indicate the actions you are expected to perform:

<table>
<thead>
<tr>
<th>Action to be performed</th>
<th>Prop. Progress status</th>
<th>Visual cue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acknowledge receipt</td>
<td>Waiting acknowledgement</td>
<td></td>
</tr>
<tr>
<td>Confirm intent to participate</td>
<td>Acknowledgement received</td>
<td></td>
</tr>
<tr>
<td>Prepare response</td>
<td>New Intends to answer In progress</td>
<td></td>
</tr>
<tr>
<td>Submit response</td>
<td>Submitted</td>
<td></td>
</tr>
<tr>
<td>End of process</td>
<td>Does not intend to answer</td>
<td></td>
</tr>
</tbody>
</table>
Contents of an RFx folder
The request for quote/proposal folder includes the following tabs:

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>This tab displays the RFx’s general information, as well as an NDA section when this is required by the Procurement Specialist. NDA (optional): When signing a confidentiality agreement is required by the Procurement Specialist, you must provide this document before accessing the RFx. Follow the instructions given to send the document to the Procurement Specialist. Acknowledgement: When the Procurement Specialist requires that you acknowledge receipt of the RFx, you must acknowledge receipt, and then, confirm or decline your participation in the RFx.</td>
</tr>
<tr>
<td>Proposal Information</td>
<td>This tab together with the Item and Questionnaire tabs allow you to provide the requested elements in your answer. In this tab, you will more specifically provide basic information relating to your response, such as label, validity end date, and summary, as well as attachments.</td>
</tr>
<tr>
<td>Item</td>
<td>This is where you can provide your quote for the specific materials or services listed.</td>
</tr>
<tr>
<td>Questionnaire</td>
<td>This is the Procurement Specialist’s questionnaire form that you must respond to as part of your proposal.</td>
</tr>
<tr>
<td>Discussions</td>
<td>This space can be used to communicate with the team in charge of the RFx (requests for clarification, for example). Your communications with the team in charge of the RFx are not visible to the other suppliers.</td>
</tr>
<tr>
<td>History</td>
<td>By default, the History tab lists the In Progress and Submitted proposals from the current round. By adjusting the search filters, you can access all proposals created on all the rounds of the RFx.</td>
</tr>
<tr>
<td>My Team</td>
<td>When the Procurement Specialist sends out the RFx, he selects one or more contacts from known contacts of your business. These are the contacts who are initially invited to participate in the RFx. Depending on your needs, the My Team tab allows the initially invited contacts to define a working team by adding/removing users.</td>
</tr>
</tbody>
</table>
Before you reply

Reviewing the RFx before acknowledging participation
- In the Overview tab, review the RFx General info and RFx documents sections.
- Review the Questionnaire and Item tabs as well.
- If anything remains unclear, use the Discussions tab to ask for additional clarification.

Acknowledging receipt and participation
This action is required. An Acknowledgement section is displayed on all tabs and you must complete this step before you can respond to the RFx.

Select the I acknowledge receipt of this RFx button. This will reveal a new set of options whereby you can express whether you intend to participate or not:
- Select the WILL BID option, if you think you will respond to the RFx.
- Select the NO BID option, if you think you will not respond to the RFx. When you click this option, a Comments field will allow you to indicate the reason(s) why you cannot participate to the RFx.
Select the Submit button.

**Giving access to the RFx to other users from your company**

When setting up the RFx, the Procurement Specialist selects one or more contacts in your Supplier sheet and chooses one “main” contact. At the launch of the RFx, all selected contacts will be notified and will be granted access to the RFx.

The My team step allows you to give access to the RFx to colleagues by adding them as contacts in this tab. You can:

- Add existing contacts (meaning contacts already declared in your supplier profile)
- Create new contacts (these will also be added to your supplier profile)
- Remove contacts, except the “main” contact, which cannot be deleted (if necessary, contact your Procurement Specialist to modify the main contact)
Selecting an existing contact
Simply choose the contact you want to add from the Choose a contact drop-down list (available only if there are existing contacts that can be added from your supplier profile).

Creating a new contact
Select Create a new contact and complete the form that displays.

Note: This new contact cannot log in to the application. Login credentials will need to be created by the Chemonics Supplier Relationship Management Team.

Removing a contact from the RFx team
Notice that you can remove any contact except for the main contact. You will recognize who this is as the Delete icon will not be visible next to their name. The main contact or supplier admin may be reassigned as needed.

Discussions (clarifications, inquiries, etc.)
The Discussions tab allows you to exchange messages with the Procurement Specialist who oversees the RFx. These messages remain confidential and are only visible by you and the Procurement Specialist. Once sent, messages are logged in the list of exchanged messages.

Creating a message
1. In the RFx, display the Discussions tab.
2. To send a question or a message to the Procurement Specialist, select the Compose button.
3. A message creation area is displayed.
   a. Message Type – (Clarification)
b. **Subject** – Title of the message.
c. **Send To** – Recipient of the message.
d. **Enter the text of your message.**

4. To add attachments to your message, select them from your file explorer and drop them into the file drop zone.

5. When your message is ready, select the Send button. The message is sent to the selected recipients and saved in the message list.

---

**Reading a message**

1. Unread messages are highlighted in bold.

2. To read a message, select the message. The thread and messages are displayed.
Replying to or forwarding a message

Use the **Reply**, **Reply to All** and **Forward** buttons.

1. To reply to the sender of the message, select the **Reply** button.
2. To reply to the sender of the message and all recipients, select the **Reply to All** button.
3. To forward the message, select the **Forward** button.

If you choose to **Reply or Reply to All**, a new message creation zone appears under the received message. Use this zone to type your message and/or attach a file. Select the **Send** button to send the message.

If you choose to **Forward**, the received message is displayed in edit mode. By default, no recipient is defined. You may select one or more recipients. Select the **Send** button to send the message.
Accessing ARTMIS Vendor Portal
Responding to an RFx

Message Type *
- Clarification

From
- Patil Vipul

Subject *
- Do you need help?

Send To

Hi John,

I noticed you have been working on this RFx for quite a while. Do you need assistance?

Sincerely,

[Click or Drag to add files]  [Send]  [Cancel]
Preparing a response to an RFx

Creating a new response

1. In the RFx, select the History tab and select Create a new proposal.

2. Select the Save button. Your proposal is now created.

3. You may now start entering information into the proposal.
   a. Quoting
   b. Adding attachments
   c. Responding to the Procurement Specialist’s questionnaire

4. You may exit the RFx at any time and re-enter later to resume entering information. Before closing make sure you save all entered information.

5. Other actions you may perform
   a. Cancel a response
NOTE: A bid can only be canceled before it has been submitted. After the bid has been submitted, there is no option to cancel the bid.
b. View the response history

Quoting

1. You can directly enter your prices by selecting the Item tab or upload an MS Excel file instead.
2. Within the Currency drop down list, select the currency to use. The default currency is the US dollar.
   
   NOTE: This field will only be available if the Procurement Specialist has enabled multiple currency options for suppliers.
3. For each item, fill in the open fields. There can be multiple response grids to address different types of items.

   NOTE: If proposing an alternative product, quantity, etc., this may be indicated in one of two ways:
   a. Add a new line. Using the Parent Column to indicate for which item grid line you are offering an alternative.
   b. If available, provide details via the Offered column equivalent.
4. Select the Save button. The total amount is calculated automatically.
Quoting in MS Excel

2. In the RFx, display the Item tab.
4. The Excel file includes several tabs (Excel sheets)
   - **Manual**: Contains instructions on how to use the file. We recommend you read this tab carefully.
   - **Response grid**: The file includes one tab per response.

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Code</td>
<td>Type code</td>
<td>Item</td>
<td>Order</td>
<td>Deliv. date</td>
<td>Unit price</td>
<td>Qty</td>
<td>Amount</td>
<td>Deliv. date</td>
<td>Unit</td>
</tr>
<tr>
<td>2</td>
<td>I1</td>
<td>Required Item</td>
<td>Item 1</td>
<td>1</td>
<td>10/16/2015</td>
<td>630</td>
<td>50</td>
<td>31500</td>
<td>5/5/2014</td>
<td>Each</td>
</tr>
<tr>
<td>3</td>
<td>I2</td>
<td>Required Item</td>
<td>Item 2</td>
<td>2</td>
<td>10/16/2015</td>
<td>50</td>
<td>100</td>
<td>5000</td>
<td>5/5/2014</td>
<td>Each</td>
</tr>
</tbody>
</table>

5. In each form (grid), fill in the blank fields.

**NOTE**: Do not attempt to override the data in the RFx’s prepopulated field. Any deviation from what is in the system will be ignored upon importing the file into the Vendor Portal.

For example, if proposing an alternative Unit of Measure (UOM), this may be indicated in one of two ways:
   a. Add a new line. Using the Parent Column to indicate for which item grid line you are offering an alternative.
   b. If available, provide details via the Offered column equivalent.

6. Save the Excel file to a location of your choice.
7. Once the form is completed, upload to the ARTMIS Vendor Portal. To do this, select the file from your file explorer and drop it into the **Click or Drag to add file area** in the upper part of the Item tab.
Adding attachments

1. Open the RFx and display the Proposal Information tab.
2. From your file explorer, drag the file attachments and drop them in the file drop zone under the RFx Documents section. Alternatively, you can click the file drop zone and select the desired file attachments.

The attached documents are listed below the file drop zone.

**Responding to the Procurement Specialist’s questionnaire**

If the Procurement Specialist has attached a questionnaire to the request for proposal, it will be available in the Questionnaire tab. You can respond to the questionnaire directly in the Questionnaire tab via MS Excel file.

*NOTE: There are some Questionnaire actions that can only be performed within the ARTMIS Vendor Portal Application. For example, download/upload document responses. Please see the Instruction tab for all other restrictions.*

**Responding directly in the displayed form**

1. In the RFx, display the Questionnaire tab.

2. Complete the questionnaire in the requested (text, attachment, check boxes, drop-down list).
3. Select the **Save** button.

**Responding in MS Excel**

Follow the same procedure as the filling in the quotation form via MS Excel. (page number) but buy using ``` Download in Excel (2007-2010 or 97-2003) format ``` and then dropping the completed file on the dedicated drop zone.
Submitting your response to the Procurement Specialist

Validating and submitting a response to the Procurement Specialist
Once your answer is finalized (quotation form is filled, questionnaire is completed, and files are attached as required by the specific RFx), you can submit your proposal to the Procurement Specialist.

1. Select the Validate & Submit Proposal button.
2. A message will display and present an overview of completed items. Review these elements before submitting your response, since a submitted response is no longer editable.

3. Select the Submit my proposal button. A message confirms that your proposal has been taken into account.

Viewing the responses’ history
Each RFx folder includes a History tab. All the responses created under this folder are logged in the History tab, regardless of their status. By default, only proposals from the current round with an In progress or Submitted status are displayed. By adjusting the search filters, you can access all proposals created on all the rounds of the RFx.

The History tab allows you to track your bid’s status. To consult a response from the History, select the label.
Procurement Specialist’s acknowledgement of receipt
When creating the RFx, the Procurement Specialist may have planned to acknowledge receipt of your answer. When this is the case, the message that is displayed during the submission of your response will say so.

When the Procurement Specialist has acknowledged receipt of your reply, the Acknowledge Icon will become green.

Submitting a different response or replacing a validated response
You can submit multiple responses on the same lot/round. If you want to create a new response when you already have validated at least one response, you must specify whether the new response is a new alternative to existing proposals or if it replaces a response.

1. Open your proposal and display the Proposal Information tab.
2. Select Create a new response button.
3. In Response type, specify if it is an alternative answer to existing responses or if it replaces an earlier response (specify what response from the drop-down list).
4. Complete your response as described in the section *Preparing a response to an RFx*, you can also duplicate a previous response, this helps you input everything again when you simply wish to change certain elements of your response (see *Creating a new response based on a previous*).

**NOTE:** If you elect to initiate a replacement bid, the bid that you have cited as being replaced will no longer be visible to the procurement specialist and cannot be considered for evaluation or award. Once submitted, the replacement bid can be viewed and considered for award.

*If a replacement bid is left in a draft status, then neither of the bids will be visible to the procurement specialist.*

*If you would like to revert to your initial proposal after initiating a replacement proposal, then you must cancel the replacement proposal in order for the initial proposal to be considered for award.*

5. Select the **Save** button.

**Creating a new response based on a previous one**

You can create a new response by duplicating a previous response (submitted responses only).

During duplication, all data are included: general information, quotation form (filled), questionnaire answers and attachments. The data can then be modified.

To duplicate your last submitted bid, select the "Other Actions" menu and select "Copy last submitted proposal".

To duplicate any bid: click the "Other Actions" menu and select "Copy an existing proposal".
1. Select the **Duplicate a previous bid** button. The *List of proposals* window is displayed. It provides a list of responses that you can duplicate. By default, the list is filtered to show submitted responses of the current round; you can change filters to show responses from other rounds and responses in other statuses. You can view these responses by clicking their label.

2. Select the response to duplicate by clicking its icon. A message is displayed, inviting you to confirm your request.

3. Select on the **OK** button. A new response is created, containing the copied response elements.

4. Make the changes you wish.

5. Select the **Save** button.
**List of Client RFx’s**

**Accessing RFx’s**
You can access an RFx that is sent to you by selecting the Sourcing Manage Proposal menu item. The Manage Proposal page is displayed.

**Becoming familiar with the interface**
The Manage Proposal page presents the list of RFx to which you are invited to respond. By default, the list displays the RFx that are open for bidding, i.e. those for which you can submit a response. You can modify this display criterion by editing the selected option in the Status list, then by selecting on the Search button (the non-selection of an option in this list allows you to display all the requests, regardless of their status).

The list of Requests provides the following information:

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prop. progress</td>
<td>Status of your last response</td>
</tr>
<tr>
<td>Sourcing process</td>
<td>Sourcing process code</td>
</tr>
<tr>
<td>Lot #</td>
<td>Lot number</td>
</tr>
<tr>
<td>Round #</td>
<td>Round number</td>
</tr>
<tr>
<td>Round</td>
<td>Round name</td>
</tr>
<tr>
<td></td>
<td>If the Procurement Specialist has filled in a more detailed description, the icon <img src="image" alt="icon" /> will appear next to the round name; roll over this icon to display the description.</td>
</tr>
<tr>
<td>RFx status</td>
<td>RFx Status (Approval, Open for bidding, Achieved, Proposals available)</td>
</tr>
<tr>
<td>Remaining time</td>
<td>Time left before the bidding period closes</td>
</tr>
</tbody>
</table>
Searching for an RFx
The upper part of the *Inbox - requests* window has multiple search filters that allow you to easily find a given RFx or a set of RFx that meet specific criteria.

1. Define your search criteria. You can filter the list on several criteria:
   a. Keywords: enter a string of characters to search.
   b. Prop. progress: allows you to display the RFx depending on the progress status of the answers that you have created.
   c. Status: select a status to display only the RFx that have this status.

2. When you’re done, select **Search** to launch the search. The corresponding RFx are displayed in the list of RFx.

3. To cancel the filters that you have selected and display the default list again, select **Reset**.