

Nevada Government eMarketplace

Supplier's Guide

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Sourcing Supplier Quick Tutorial

The Sourcing Quick Tutorial provides instruction to suppliers on system navigation, locating bid requests and creating and submitting a response.

System Requirements

- A standard web browser that must have JavaScript enabled
 - IWT recommends Internet Explorer 9.x or greater for the best system performance
 - Mozilla Firefox – current version recommended
 - Safari – current version recommended
 - Chrome – current version recommended
- The browser must also allow pop-up windows when accessing the system.
- Establish <this site> as a Trusted Site in your browser's Internet Options, Security settings.
(https://<thissite>.ionwave.net)

Responding to Bid Requests – Quick Tutorial

- Login
- The page will open to the 'Available Bids'
- Click the bid number to View the bid request from the 'My Invitations' or 'Other Bid Opportunities' Section

Bid Number	Organization	Bid Title	Bid Type	Bid Issue Date	Bid Close Date/Time	Time Left	Response Status
ITB-2202	Demo	Industrial Supply Contract	ITB	06/26/2012	8/12/2012 2:00:00 PM CST	2 Days, 50 Mins	No Response
ITB-2198	Demo	Computer Servers	ITB	05/04/2012	8/20/2012 2:00:00 AM CST	2 Days	No Response
ITB-2197	Demo	Industrial Supplies Contract	ITB	05/04/2012	8/22/2012 2:00:00 AM CST	4 Days	No Response
ITB-2196	Demo	Office Supply Contract	ITB	05/02/2012	8/24/2012 2:00:00 AM CST	6 Days	No Response
ITB-2195	Demo	Paper Products Contract	ITB	05/24/2012	8/27/2012 3:00:00 PM CST	10 Days	No Response
ITB-2210	Demo	Light Bulb Contract	ITB	07/25/2012	8/29/2012 3:00:00 PM CST	12 Days	No Response
03-115	Demo	Construction Management Software RFP	RFP	01/04/2012	8/30/2012 2:00:00 AM CST	12 Days	No Response
ITB-2207	Demo	Industrial Supply Contract	ITB	07/12/2012	8/31/2012 12:00:00 PM CST	14 Days	No Response
05-121	Demo	Construction Project Management Software	RFP	07/26/2012	8/31/2012 3:00:00 PM CST	14 Days	No Response
KR-2012-08-06	Demo	Lamps	Sealed Bid	08/06/2012	8/06/2012 12:00:00 PM CST	20 Days	No Response

Items 1-10 shown of 13 Page 1 of 2 shown

Multiple Pages of Bid Attachments, Attributes and Line Items – Pagination

If displayed, click to the next page to access additional pages. (Located at the bottom of each section)

Items 1-15 shown of 31 • Page 1 of 3 shown 1 2 3 > >>

The following tabs may be present when viewing a bid. If one of the tabs listed below does not appear on your event, then it is not applicable to the event.

Event Details

Review bid information including Bid Notes as well as the contact, ship to and bill to information.

Messages

View messages specific to the bid request.

Activities

Activities may include an Intent to Bid, a Participation Activity such as a walk-thru or other meeting, or it may be a Non-Participation Activity listed for your information.

Participants

The event participation list displays only with the permission of the buying organization.

Attachments

- Bid attachments are included by the buyer for a number of reasons which include but are not limited to the following:
 - Informational purposes
 - To provide the supplier with a form to complete and submit a response attachment
 - **Click** the 'View' link
 - Open and Save the file to your desktop or another drive

Attributes

- Read and/or answer all attributes
- Required attributes have a red asterisk (*) to the left of the required field
- A required attribute must be answered in order to submit the response
- Click **'Save'** (to save your responses)
- Click **'Error Check'** (to determine if you have missed any required responses)

Line Items

- Enter pricing in the price or percentage field provided
- Required line items have a red asterisk (*) to the left of the required price field
- A required line item must be answered in order to submit the response
- Item Attributes - Answer questions, complete checklists, and review additional terms and notes specific to the line item. (Line attributes may not be present on the bid request)
- Item Attachments - Click **'View'** to access the downloadable field(s) pertaining to this line item. (Item level attachments may not be present)
- Supplier Notes - Enter comments for buyer review. (Field may not be present)
- Click **'Save'** (to save your responses) – Extended pricing will display after clicking 'save'
- Click **'Error Check'** (to determine if you have missed any required price fields)

Zero

Zero (\$0.00) entered in the line item price field is defined by the buyer using one of the parameters below. The red text is the message displayed to suppliers at the line item level to indicate the parameter selected by the buyer:

- Zero is a valid response - **A response of '0' (zero) to Unit Price is interpreted as a response*

- Zero is considered a 'No Bid' - **A response of '0' (zero) to Unit Price is interpreted as a 'No Bid' response*
- Zero is not a valid response - **A response of '0' (zero) to Unit Price is not interpreted as a response*

No Bid

Unless specified by the buyer, you do not have to use the 'No Bid' function at the line level. You can leave a non-required price field blank and the 'No Bid' is assumed. If using the 'No Bid' function, do the following:

- Click 'No Bid' (if you prefer to 'no bid' a line)
- Click '**Clear**' to remove a 'No Bid'

Add Alternates

Where allowed, you can bid an alternate.

- Click '**Add Alternate**' – enter the fields provided
- If you added an alternate in error, Click '**Delete**' at the left of the screen. (located just under the *Alt* #)

Add Notes

Where allowed, click to add a supplier note. Leave the field blank and "Save" to close the expanded field.

Requested Attachments

A requested attachment is a required or optional attachment that the buyer has requested. A red asterisk (*) located next to the requested file name indicates that it is required.

- Click "Upload"
- The file selection window will open
- Click "Select File"
- Highlight the file to be attached
- Click "Open"
- The file will upload

Download Button

Click to view the attachment. (Located at the left of the file name)

Delete Button

Click to remove the attachment. (Located on the far right column next to the file name)

If you have attached a file that requires additional editing, you must delete the attached file and attach a corrected file. You cannot download the file and save changes to the file while it is attached to a response.

The maximum file size limit is 25 megabytes.

Other Response Attachments

Attach response attachments that have not been requested by the buyer. The other response attachments section is only available if the buyer allows.

- Click “New”
- Click the “Select File” button
- Highlight the File
- Click “Open”
- Enter the Description (REQUIRED)
- Click “Upload”
 - To view your response attachment, click the **Download** button
 - If you have attached the wrong file, “Delete” the file and attach the correct file. The delete button is located in the far right column

The maximum file size limit is 25 megabytes.

Response Submission

Update your Information

Update your supplier profile or your user profile by using the ‘Update’ link.

Supplier Note to Buyer

Enter a note to the buyer. (Optional)

Digital Signature

Enter Your Full Name (Required) & Your Email Address (Required)

- Click “**Error Check Response**” (to determine if you have missed any required fields.)
- Click ‘**Submit**’ Response’
- A **successfully submitted response** will display ‘Response Submitted’ followed by the date and time stamp in the Response Status field
- **Retract**’ to make changes to the submitted bid response
- A retracted bid response is no longer considered “submitted”. The user **MUST** ‘**Submit**’ a retracted bid response again

Submission Errors

- When errors occur, the system will display the location of the errors. In the example below, the errors occur in the Attributes, Line Items and Response Submission Tab

The screenshot shows the 'Edit Bid Response' page for bid TST-2013-09/25. At the top, there are tabs: 'Return', 'No Bid', 'Documents', 'Response History', 'Bid History', and 'Error Check Response' (which is active). Below these, the bid details are listed: Bid Number (TST-2013-09/25 (Art Supplies)), Close Date & Time (10/25/2013 12:00:00 PM Central), Time Left (28 days 1 hours 33 minutes 58 seconds), and Response Status (NOT SUBMITTED - To complete your response, you must click 'Submit Response' in the Response Submission tab.). A red error banner with a warning icon states: 'Error Check - There are 4 Error Messages Present in Your Response! Please review the following tabs:'. Below this, a list of tabs is shown: 'Event Details', 'Activities', 'Attachments', 'Attributes', 'Line Items', 'Response Attachments', and 'Response Submission'. The 'Attributes' tab is highlighted. Below the tabs, the 'Supplier Response Summary' section shows two error messages: 'Digital Signature: You must enter the email address of the individual responding to this event.' and 'Digital Signature: You must enter the full name of the individual responding to this event.'. At the bottom, there are two sections: 'Your Supplier Profile' and 'Your User Profile', each with an 'Update your Information' link.

- Go to the problem area and correct the errors
- The example above indicates an Attribute Tab error
- You must go to the tab that contains the errors to review the error detail and correct
- Once the errors are corrected, proceed to the Response Submission Tab to submit the response

Bid Closing

- The system will generate and send an email notification when the event closes
- Login and Click the event number in the listing to view the bid
- Click 'Documents' to review your Supplier Individual Response Document and other associated documents

Bid Award and Award Detail

- The system will generate and send an email notification when the bid is awarded
- Login and Click the event number in the listing to view the bid and associated pre-award and award documentation

Retract a Bid Response

Suppliers may retract a bid response provided the issuing organization allows the process. If bid retractions are not allowed, the “retract” button will not be visible on the Response Detail page. Retracting a response allows the supplier to change all or part of the bid response that was previously submitted.

Important Reminders:

- Retracting a bid response **does not** delete the response that is currently entered
- If you “retract” a bid response, your response is no longer submitted
- You must click “Submit Response” on the Response Submission Tab for your retracted bid to be submitted again
- If the issuer does not allow retractions, you will need to contact their procurement office for assistance

Retract a Bid Response

- Login
- Click the bid number located under the “My Invitations” or “Other Bid Opportunities” section.
- Click “Retract” (When the Response Detail page opens)

Response Detail - IWT-2014-04/10

Return Retract Documents Response History Bid History

Bid Number IWT-2014-04/10 (General Supplies)

Close Date & Time 5/10/2014 12:00:00 PM Central

Time Left 30 days 45 minutes 1 seconds

Response Status Response Submitted - 4/10/2014 11:13:39 AM Central

Event Details Activities Attachments Attributes Line Items Response Attachments Response Submission

- Click “OK” (to proceed with the retraction)
- Click “Cancel” (to exit the retraction process)
- Your bid response is now retracted (NOT SUBMITTED). See the Response Status field in the Edit Bid Response screenshot
- **Bid Response Retraction Email Notification** – An email notification is sent to the user’s address of record when a bid retraction is completed

Edit Bid Response - IWT-2014-04/10

Your Response has been Retracted

Return No Bid Documents Response History Bid History Error Check Response

Bid Number IWT-2014-04/10 (General Supplies)

Close Date & Time 5/10/2014 12:00:00 PM Central

Time Left 30 days 35 minutes 8 seconds

Response Status NOT SUBMITTED - To complete your response, you must click 'Submit Response' in the Response Submission tab.

Event Details Activities Attachments Attributes Line Items Response Attachments Response Submission

- Click the tab(s) to make response edits.
- Save your work on each tab.

- Review your response.
- Click the “Response Submission” Tab
- Click “Submit Response” (at the bottom of the page)
- Click “OK” (to complete the submission)
- When your response is submitted, the Response Status field will indicate “Response Submitted” with a date and time stamp. (See the Response Status field in the Response Detail screenshot below)
- **Bid Response Submission** - An email notification is sent to the user’s address of record when a bid response is submitted

Response Detail - IWT-2014-04/10

Return Retract Documents Response History Bid History

Bid Number IWT-2014-04/10 (General Supplies)

Close Date & Time 5/10/2014 12:00:00 PM Central

Time Left 30 days 45 minutes 1 seconds

Response Status Response Submitted - 4/10/2014 11:13:39 AM Central

Event Details Activities Attachments Attributes Line Items Response Attachments Response Submission

- Your Available Bids homepage will also indicate the status in the Response Status column below. (See the far right column)

Available Bids Closed Bids My Responses My Awards

Welcome to Enterprise Sourcing Pro!

To view or respond to a current bid event, click on the **Bid Number** below. To access information about closed events, click the 'Closed Bids' tab.

To view a four page quick reference guide on how to respond to a bid, click here.

My Invitations

Bid Number	Bid Title	Bid Type	Bid Issue Date	Bid Close Date/Time	Time Left	Response Status
IWT-2014-04/10	General Supplies	CSP	04/10/2014	5/10/2014 12:00:00 PM CT	30 Days	Submitted

Items 1-1 shown of 1

Other Bid Opportunities

No Bid Requests

Supplier Profile - Add a User

IWT recommends adding a user with an email address that delivers to a distribution list. For example,
sales@<companyname>.com

- Login
- Click “My Profile” (located in the top blue banner bar)
- Click “Company Profile”
- Click the “Users Tab”
- Click “New”
- Enter the user information
- Important time zone information: If you work in an area that observes daylight savings time, be sure to select your time zone with the “(observes daylight savings time)” designation
- Note the temporary password listed at the bottom of the page. Provide the username and the temporary password to the user. The system will prompt them to change the password upon login
- Click “Save”

Edit a User

- Place a check next to the user
- Click “Edit.”
- Change the applicable user information
- Click “Save”
- The system will display a message **“User Profile Updated”** located in the upper left of the screen

Supplier users are automatically assigned all available user roles:

Company Administrator

ROLE FUNCTIONS:

- Ability to log in and manage user profile
- Access to view/edit the supplier’s profile information; *ability to view messages/history*
- Access to view/respond to bid requests

Profile Management

ROLE FUNCTIONS:

- Ability to log in and manage user profile
- Access to view/edit the supplier’s profile information; *ability to view messages/history*

Bids Module

ROLE FUNCTIONS:

- Access to view/respond to bid requests

Auctions Module (This role is not available to all users)

ROLE FUNCTIONS:

- Ability to log in and manage user profile
- Access to view/respond to auction requests

Unlock/Reset Password

- Place a check next to the user's name and click Unlock/Reset Password
- Click "OK" to proceed (located in the pop-up box)
- Retain the email address that populates the user email field or enter another email address. If you enter a different email address, the address of record will change for the user
- Enter a note if applicable. The entry will display on an email to the user
- If the user account is inactive, you can place a check in the "Re-activate" box to activate the user account when resetting the password
- Click "Save" (Saving triggers an email to the user)
- The user will receive an email containing their username and a temporary password
- The user will login using the username and password provided on the email message, and will be prompted to change the password
- The new password is entered twice for confirmation purposes. (*Do not re-enter the temporary password*)
- The user will enter the new password for future login activity

Inactivate a User

You never delete a user. Users are active, inactive or locked.

- Place a check next to the user's name
- Click Activate/Inactivate
- The user's status will display in the far right status column

Supplier Profile - Address Book

An updated and accurate address book is very important. Your addresses are captured during supplier registration. However, it is recommended that you check your entries periodically for accuracy.

Add an Address

- Login
- Click “My Profile” (located in the top, blue banner bar)
- Click “Company Profile”
- Click the “Address Book” Tab
- Click “New”
- Enter all required and other applicable fields
- Place the button next to “Yes” to designate the address as the default for Company Address or Billing Address. One address can be designated the default for both. A Company Address and Billing Address default is required. You must choose at least one address to serve as your default
- Click “Save”

Edit an Existing Address

- Login
- Click “My Profile” (located in the top, blue banner bar)
- Click “Company Profile”
- Click the “Address Book” Tab
- Place a check next to the address entry
- Click “Edit”
- Enter Updates
- Place the button next to “Yes” to designate the address as the default for Company Address or Billing Address. One address can be designated the default for both. A Company Address and Billing Address default is required. You must choose at least one address to serve as your default
- Defaults are designated in the default column of the address list.
- Click “Save”

Delete an Existing Address

- Login
- Click “My Profile” (located in the top, blue banner bar)
- Click “Company Profile”
- Click the “Address Book” Tab
- Place a check next to the address entry
- Click “Delete”
- The prompt will ask you if you are sure you want to delete
- Click “Cancel” or “Ok”

Supplier Profile - Commodity Codes

Commodity codes are used in Sourcing to match suppliers to bidding events. Keep your registration up-to-date by adding or deleting commodity codes on your profile.

Add Commodity Codes

- Login
- Click “My Profile” (located in the top blue banner bar)
- Click “Company Profile”
- Click the “Commodities” Tab
- Click “Edit”
- Click “Select”
- Click the plus [+] sign to open a category
- Click [Select] to associate your profile with a commodity code
- The code will move to the right of the screen
- Click [Save Selections] (to save the selection listed)

Delete Commodity Codes

- Login
- Click “My Profile” (located in the top blue banner bar)
- Click “Company Profile”
- Click the “Commodities” Tab
- Click “Edit”
- Click “Select”
- Remove a commodity by clicking [Delete] next to the commodity code
- The commodity will be removed from the right screen list
- [Save Selection] saves your listed selections to your profile

Search for a Commodity Code

- Search – Enter the commodity name in the search criteria field in the upper left corner.
- Click “Search”
- Selections will display
- Use the [Show Treeview] to view the entire commodity code listing.
- **[Expand All]** – Click to display commodities in each category
- **[Collapse All]** – Click to close the commodity code tree

Supplier Profile - Inactivate a User

Inactivate a user if you want to suspend system access permanently or temporarily. Users are active, inactive or locked. Users are never deleted.

Inactivate a User

- Login
- Click “My Profile” (located in the top, blue banner bar)
- Click “Company Profile”
- Click the “Users” Tab
- Place a check next to the user’s name
- Click Activate/Inactivate
- The user’s status will display in the far right status column
- Re-Activate the user’s account by placing a check next to the user name and clicking Activate/Inactivate

Note: If a user account is “**Locked**” please refer to the help document, Supplier Profile – Unlock/Reset Password.

Supplier Profile - Special Classifications

Register your organization to be identified as a special classification. Once you register for a classification, the buying organization reserves the right to activate or reject the classification. You may be asked to provide additional information to the buying organization.

Add Commodity Codes

- Login
- Click “My Profile” (located in the top, blue banner bar)
- Click “Company Profile”
- Click the “Special Classifications” Tab
- Place a check next to the classification
- Click “Register” (next to the classification selection)
- Enter “Registration Notes” – Notes are provided to the buyer. (This field is optional)
- Click “Save”
- Your classification will be placed in pending approval status until it is activated
- When your classification becomes active the status will change to “Approved” and will display in the status column of the special classification tab
- You will receive a notification email informing you of the approval or rejection of the special classification

Supplier Profile - Unlock-Reset Password

Passwords can be changed manually or the password reset function can be used. See below for instructions.

Inactivate a user if you want to prohibit system access permanently or temporarily.

Locked

Users with locked accounts have exceeded the maximum 5 login attempts. Suppliers who lock their accounts must be unlocked by their organization's administrator or contact the host purchasing office.

- Login
- Click "My Profile" (located in the top, blue banner bar)
- Click "Company Profile"
- Click the "Users" Tab

Manual Password Change

- Place a check next to the user's name
- Click "Edit"
- At the bottom of the page...
 - Enter the Current Password
 - Enter the New Password
 - Enter the New Password again to Confirm
- Click "Save"

Unlock/Reset Password

- Place a check next to the user's name and click Unlock/Reset Password
- Click "OK" to proceed (located in the pop-up box)
- Retain the email address that populates the user email field or enter another email address. If you enter a different email address, the address of record will change for the user
- Enter a note if applicable. The entry will display on an email to the user
- Click "Save" – Saving triggers the email notification
- The user will receive an email containing their username and a temporary password
- The user will login using the username and password provided on the email message, and is prompted to change the password. (*Do not re-enter the temporary password in these fields*)
- The new password is entered twice for confirmation purposes
- The user will enter the new password for future login activity

Inactivate a User

You never delete a user. Users are either active or inactive

- Place a check next to the user's name and click Activate/Inactivate
- The user's status will display in the far right status column
- Re-Activate the user's account by placing a check next to the user name and clicking Activate/Inactivate

Supplier Profile - Time Zone Setting

- Login
 - Click “My Profile” (located in the top blue banner bar)
 - Click “Company Profile”
 - Click the “Users Tab”
 - Place a check next to the user
 - Click “Edit”
 - Use the drop down menu next to the Time Zone Setting to select your time zone.
 - Click “Save”
 - The system will display a message “User Profile Updated” located in the upper left of the screen
- Special Note
 - If you live in an area that observes daylight savings time, select the applicable time zone followed by (Observes Daylight Savings Time)
 - If you live in an area that does not observe daylight savings time, select the applicable time zone