UCONN HUSKYBUY SOURCING EVENT INSTRUCTIONS

EXCERPT FROM JAGGAER SUPPLIER HANDBOOK

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WHAT ARE SOURCING EVENTS?

When beginning a project, Procurement Agents require a significant amount of information from potential suppliers. For many, this is a manual process involving a large amount of paperwork and the mailing or faxing of forms and background information. Automated responses simplify the process, enabling easier distribution of response opportunities and details, along with rapid follow-up communication when needed. Sourcing is the process of automating those responses.

UConn HuskyBuy Sourcing solution are able to design projects and events, and invite suppliers to those events. Depending on the type of event, you may be required to submit different information.

Once an event closes, the Procurement Agent evaluates all responses and selects a supplier for the award.

VIEW PUBLIC VS. PRIVATE SOURCING EVENTS?

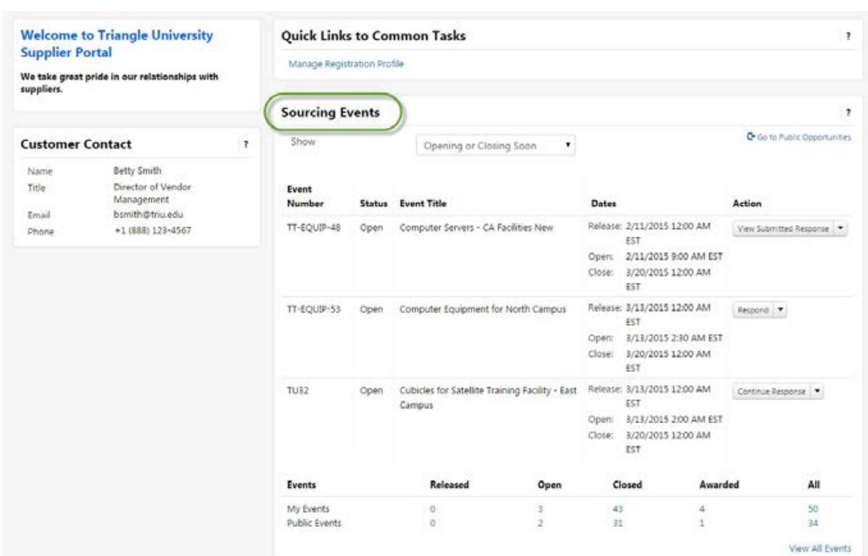
You may respond to a HuskyBuy's Sourcing Events in two ways:

1) The Procurement Agent has invited you to respond and you can click in an email to navigate to the event, or go to the event within your existing portal to UConn HuskyBuy to see event details and respond; or

2) Access the event via the UConn HuskyBuy's public website, and respond accordingly.

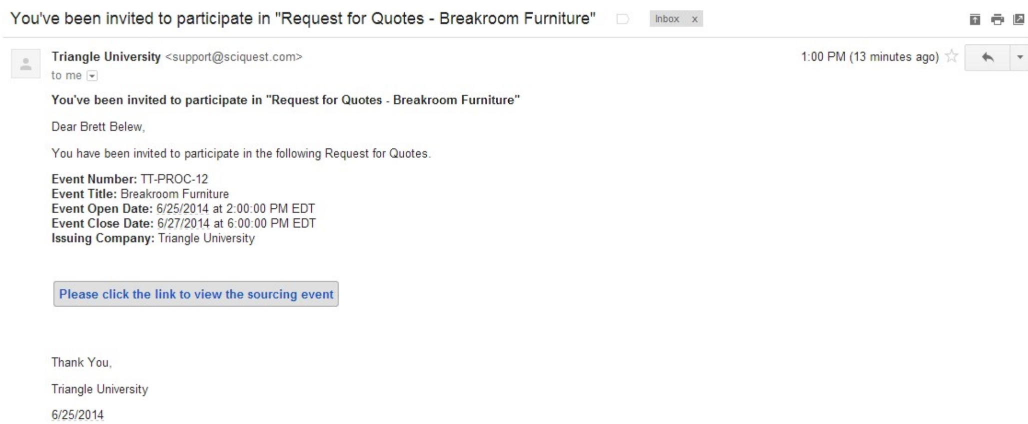
Public Events

A public event is one that is available for any supplier to access. A UConn HuskyBuy Event must have configured a "public" site for suppliers to access. Once you select to view an event, you will be navigated to the event within the UConn HuskyBuy portal in your Supplier Network. If a user does not have an account in the JAGGAER ONE Supplier Network, they can select to Create Account on the UConn HuskyBuy login page and follow the directions for gaining access to a UConn HuskyBuy portal.



Private Events

A private event is one in which your organization is directly invited by the UConn HuskyBuy to participate. You will receive an email inviting you to view and respond to the event. If the invited user does not yet have a user account for the supplier network portal, the link will take the user through the process of creating an account.


You've been invited to participate in "Request for Quotes - Breakroom Furniture" Inbox x

Triangle University <support@sciquest.com>
to me

1:00 PM (13 minutes ago)

You've been invited to participate in "Request for Quotes - Breakroom Furniture"

Dear Brett Belew,

You have been invited to participate in the following Request for Quotes.

Event Number: TT-PROC-12
Event Title: Breakroom Furniture
Event Open Date: 6/25/2014 at 2:00:00 PM EDT
Event Close Date: 6/27/2014 at 6:00:00 PM EDT
Issuing Company: Triangle University

Please click the link to view the sourcing event

Thank You,

Triangle University

6/25/2014

You can also view a UConn HuskyBuy Event in the Supplier Network and in the individual UConn HuskyBuy portal. Only users with access to see a UConn HuskyBuy's sourcing events will see the link to events in the portal.

Once you have accessed an event, follow the directions in responding to the event.

ACCESS TO SOURCING EVENTS

Access to sourcing events is determined by two permissions:

- **View and Respond to Sourcing Events**: This permission allows a supplier portal user to view and access sourcing events to which they are invited. The user has access to the Sourcing Events dashboard on the home page, and can search for, view and respond to sourcing events from UConn HuskyBuy.
- **Manage All UConn HuskyBuy Events**: This permission allows a user to manage the sourcing activities for all UConn HuskyBuy Events.

If a user responds to a sourcing invitation via email by selecting the provided link in the email, the user is given the **View and Respond to Sourcing Events** permission upon logging into the portal. A user must be assigned the **Manage All UConn HuskyBuy** permissions via a role or at the user level in order to have access to all Sourcing Events from all UConn HuskyBuy.

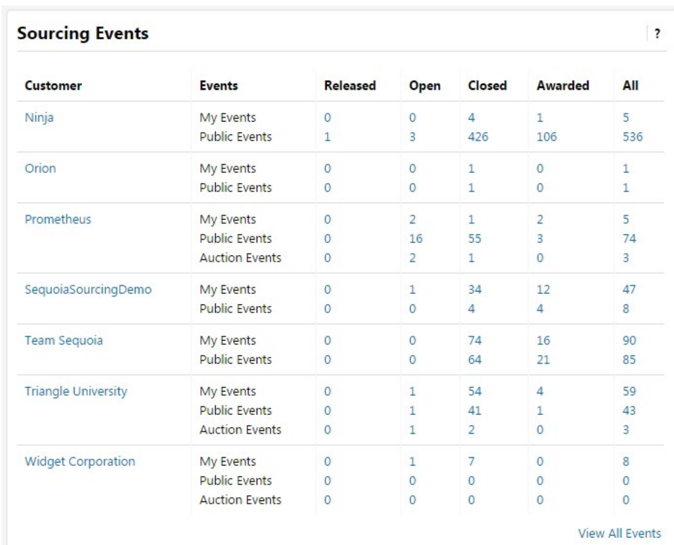
Access Event - Step by Step

1. Navigate to sourcing events from the **Supplier Network** via:
   a. From the home page, select the hyperlink to **View All Events** in the **Sourcing Events** widget to see all sourcing events from all UConn HuskyBuy Events.
   b. From the home page, select the UConn HuskyBuy Event's name hyperlink from the **Sourcing Events** widget to navigate to the UConn HuskyBuy's portal and view all sourcing events for that UConn HuskyBuy.
   c. From the home page, select the number hyperlink for the appropriate event status (i.e. Released, Open, Closed or All) from the **Sourcing Events** widget to navigate to the UConn HuskyBuy's portal and see all sourcing events in that status.
   d. From any page, navigate to **Sourcing > Sourcing Events > Search Events** and conduct a search for events meeting specific criteria..
2. Navigate to sourcing events in the **UConn HuskyBuy Portal** via:
   a. From the portal home page, select the hyperlink to **View All Events** in the **Sourcing Events** widget to see all sourcing events from that UConn HuskyBuy.
   b. From the portal home page, select the **Action** button to **Respond** for active events in the **Sourcing Events** widget.
   c. From the portal home page, select the number hyperlink for the appropriate event status (i.e. Released, Open, Closed or All) from the **Sourcing Events** widget to see all sourcing events in that status.
   d. From any page, navigate to **Sourcing > Sourcing Events > Search Events** and conduct a search for events meeting specific criteria..
3. When viewing the list of sourcing events, note the information provided for the event including event number, status, event title, dates, the supplier, and Action button.
4. Select from the available filters on the left to refine search results.
5. For the appropriate event, click the button under **Action** to **View Event** or **Respond**
   a. **View Event**: allows user to view the event details. The user cannot respond to the event, but can view responses and Questions and Answers for the event.
   b. **Respond**: allows the user to respond to the event.

RESPONDING TO SOURCING EVENTS

If you are logged into the JAGGAER ONE Supplier Network or UConn HuskyBuy portal, and have appropriate permissions to see sourcing events from UConn HuskyBuy, you will see the Sourcing Events shown in the widget on the Supplier Network home page or the UConn HuskyBuy Portal home page.

Supplier Network Home Page Image

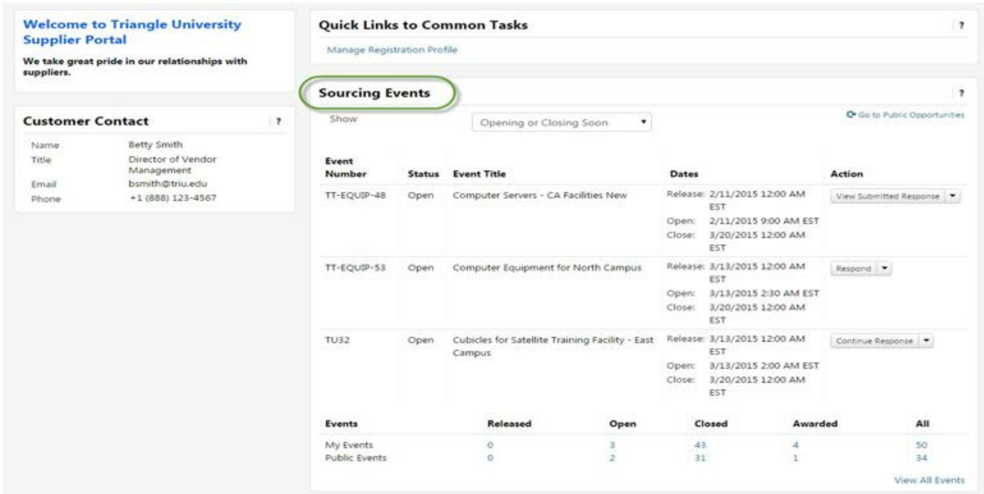


Sourcing Events ?

Customer	Events	Released	Open	Closed	Awarded	All
Ninja	My Events	0	0	4	1	5
	Public Events	1	3	426	106	536
Orion	My Events	0	0	1	0	1
	Public Events	0	0	1	0	1
Prometheus	My Events	0	2	1	2	5
	Public Events	0	16	55	3	74
	Auction Events	0	2	1	0	3
SequoiaSourcingDemo	My Events	0	1	34	12	47
	Public Events	0	0	4	4	8
Team Sequoia	My Events	0	0	74	16	90
	Public Events	0	0	64	21	85
Triangle University	My Events	0	1	54	4	59
	Public Events	0	1	41	1	43
	Auction Events	0	1	2	0	3
Widget Corporation	My Events	0	1	7	0	8
	Public Events	0	0	0	0	0
	Auction Events	0	0	0	0	0

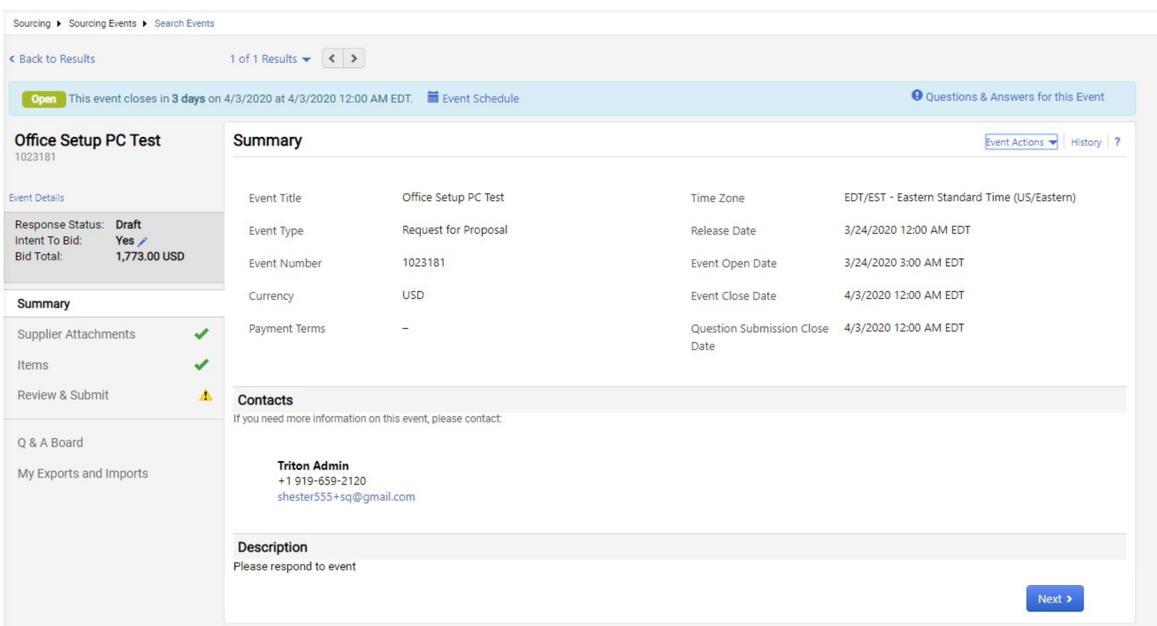
View All Events

UConn HuskyBuy Portal Home Page Image



NAVIGATING THE EVENT

While the actual details in the event vary depending on the UConn HuskyBuy event, basic features are included in each event view.



- Event status bar - Across the top you'll notice a blue bar with the Event status indication. This status bar is displayed regardless of the event page you are viewing. This lets you know if the event is Open, and what time it will or has closed. You can click to see an event schedule (i.e. if you are on a page where the dates are not shown), and also easily navigate to Questions and Answers for the event. A message will indicate if you are viewing a multi-stage event, and you can select a hyperlink to **View Event Stages**

- Event information - On the left side of the page, the name and number of the Event displays. This panel is displayed regardless of the event page you are viewing. Click the **Event Details** hyperlink to see basic event information and key dates at any time. Your **Response Status** is displayed, which changes when you begin completing information for the event, as well as **Intent to Bid** and **Bid Total**, if you have updated any of that information. You can click the pencil icon next to Intent to Bid to select a Bid option at any time. If the event has multiple stages, you will see a link to **View Event Stages.**
- Navigation pages for event details - On the left are the pages that are included in the event. These pages may include Prerequisites, Procurement Agent Attachments, Supplier Attachments, Questions, Items and Review & Submit. Click on any of these pages to navigate directly to that page.
- Event Actions - At the top right of the event is a dropdown for Event Actions, where you can select to **Print this Event**. You may also have the option to **Export Event** information to a PDF file if you have accepted required prerequisites.
- Save Progress or Next button - selecting either the Save Progress or Next button saves your current changes. Clicking Next will navigate you to the next page.

COMPONENTS OF THE EVENT

Summary

You will first be navigated to the summary page of the event, which lists basic details about the event, including key dates. The summary page also contains the Procurement Agent's contact information and the description of the event. If you have any questions about the event, contact the person listed in the Contacts Section. <u>If the Procurement Agent has requirements before you can view the event, such as to review prerequisites or declare your bid intent, you cannot navigate past this page until you complete those options</u>.

Prerequisites

A Procurement Agent may provide prerequisite information that is important for you to know, view or acknowledge when considering your response to the event. The Event require you to review the Prerequisite page information before allowing you to either 1) see the event details, or 2) respond to the event. If a prerequisite is required, you will see a banner message indicating that you must review the prerequisites page (and possibly provide information) in order to view or respond to the event.

Once the user selects **Proceed to Prerequisites** button or clicks on the **Prerequisites** navigation page on the left, follow the prompts to confirm your acceptance of the prerequisite information.

After you have completed the required actions on the Prerequisites page, the banner message is removed. You will now have access to view the remainder of the event or to begin responding to the event, depending on the requirement criteria. You have the ability to indicate an attachment provided in this section is Confidential, meaning only specific Procurement Agent users can open the attachment. Confidential attachments display on the page with an icon ( ).

Note: The Procurement Agent may not require you to review Prerequisite information, but may still provide valuable information on that page. It is important to review all the information provided by the Procurement Agent for the event.

Intent to bid

Once you have reviewed any required prerequisites, you will be prompted to declare your intent to bid. You can do this by clicking the appropriate button in the banner message, or by selecting the edit icon next to the Intent to Bid status in the left panel.

The Procurement Agent will be able to see that you have declared your intent to bid or not. If you do not intend to bid on the event, select No Bid and there is no further action required. You can change your intent as long as the event is open.

Procurement Agent Attachments

The Event may have attachments or URLs for your review and consideration when responding to the event. Examples may include:

- an area diagram or photograph if the event is for landscaping services

- an office layout for placement of new carpet or flooring
- detailed specifications for an event
- a URL link to additional company information

To open or save the attachment, or to navigate to the URL address, simply click on the link.

Supplier Attachments

The Supplier Attachments Section in the event to allow you to provide attachments as files or URL links related to your company, bid response, or the event in general. This section is optional. You can choose to add a confidential attachment that can only be opened by specific users within the Procurement Agent organizations.

Click the **Add New Attachment** dropdown and choose **Add New Attachment** or **Add Confidential Attachment** to upload your file or provide a URL link. Confidential attachments display on the page with an icon ( ).

Questions

The Event will ask detailed questions for you to answer. Responses may be in the form of yes/no answers, multiple selections, free-form text, a date, require you to upload a file, and other options. Events designate responses to questions as required or optional. Required answers are indicated with a star ( ) and must be answered in order to submit your response for consideration.

When responding to a file attachment question, you have the opportunity to flag the attachment as confidential. Confidential attachments display with an icon ( ).

Note that questions may be organized in groups on multiple pages. The questions do not have to be answered in order. You may save progress if you need to come back to the page later to provide additional answers.

Items - Currently not used by UConn Capital Projects and Facilities Procurement

Review and Submit

The **Review and Submit** page contains a summary of all the sections of the events, and highlights any missing information that is required to submit the event response. You will not have the ability to click **Submit Response** until required information is completed.

Once all items are completed, click the certification statement and the button to **Submit Response**. The page will refresh with a confirmation that your response was submitted, and you can easily navigate to the portal Home Page, print the event details, or return to the Event Summary.

Upon close date for the event, the Procurement Agent will review all supplier responses.

History link

An audit log is captured for event responses. Click the **History** hyperlink for the event to view the log of changes to the event responses. You can sort entries by date, user, action, section, subsection or context. Click on the Filter History hyperlink to see audit entries based on dates, type of action, or section for the event. You may also export the event history by selecting the **Export CSV** link.

Editing your Responses

You may edit your responses at any time while the event is still open. You may also click the **Withdraw Bid** button if you would like to withdraw your bid before the event closes. You may then edit responses and submit your bid again, if desired.

Q&A Board

The Q&A Board for the event is available until the event closes or until a separate date provided by the Procurement Agent.

My Exports and Imports

The **My Exports and Imports** page provides status information and download files for

Questions and Item export and import requests you have made.

RESPONDING TO AN EVENT

Note that not all of the sections will display in all events. Responding to Sourcing Events will vary depending on the type of Event. The following is intended to be basic steps which may or may not be on the specific events:

1. From your Supplier Network home page or the UConn HuskyBuy portal, find an Open sourcing event and select the **View Event** or **Respond** button.
   a. **View Event** displays if there are prerequisites that must be reviewed prior to seeing details and responding to the event.
   b. **Respond** displays when you can immediately begin responding to the event.
2. You are navigated to the Summary page of the Event. Note the event information including key dates, payment terms, contact information and a brief description of the event.
3. If the Procurement Agent has included Prerequisites Required to View Event:
   a. Click on the **Proceed to Prerequisites** button, or click on the **Prerequisites** link in the left navigation panel for the event. You are navigated to the Prerequisites page for the event.
   b. Follow the instructions on the page. This may include selecting a checkbox to confirm you have read and agreed to the terms, and/or uploading a file per the question's request.
      - File Uploads - You have the option to flag file uploads as a **Confidential File**. Only Procurement Agent users with specific permissions will have access to open such files.
   c. When finished completing the requirements on the page, click the button to **Save Progress**.
4. Set your **Intent to Bid**. You can do this either of these ways:
   a. Click the button in the banner, **Yes I Intend to Bid** or **No Bid**
   b. In the left navigation for the event, click the edit icon next to the Intent to Bid, and choose **I intend to bid on this event** or **No Bid**.
   c. If you choose No Bid, then no further action is needed.

5. View **Procurement Agent Attachments**, if provided.
   a. Click on the **Attachments** link in the left navigation for the event.
   b. While on the Prerequisites page, click the **Next** button.
   c. Download and view attachments or URL links as needed.
6. Provide **Supplier Attachments**, as appropriate. You may select to add a file or URL link.
   a. Select **Add New Attachment**. dropdown and choose **Add New Attachment** or **Add Confidential Attachment**.
   b. To add a file, select to **File** as the **Attachment Type**. For **Confidential Attachments**, **File** is the only option and is read only. Multiple files can be uploaded at one time.
      i. Click **Select Files** to access a file selector from which multiple files can be selected, or drag and drop files to the gray box surrounding the **Select Files** button.
      ii. The selected files are displayed in the overlay. Optionally, edit the file name entries so that the field contains a preferred file display name such as "Additional Information" or "References".
      iii. Click to **Save Changes** to complete the file upload and close the overlay.
      iv. The page refreshes with the selected files displayed. Confidential attachments display on the page with an icon).
   c. To add a URL link. select **Link** as the **Attachment Type** (option not available for Confidential Attachments).
      i. Enter an optional **Name** for the link, such as "Company contact information" or "Terms and conditions" .
      ii. Enter the **URL** link address.
      iii. Choose a **Display Order**, if applicable.
      iv. Click to **Save Changes**.
   d. As new attachments are added, you may choose the **Display Order** as you add them to the page.
7. Answer **Questions** from the UConn HuskyBuy, if provided.
   a. Navigate by selecting the **Questions** hyperlink in the left navigation panel for the event, or by selecting the Next button when on the Attachments page.

b. Required questions are indicated with a star, and must be answered in order to submit your response.
c. Answer other questions as appropriate to give complete information. For information on providing responses via import, see Export Questions and Import Question Responses exercises.
d. Questions may be on multiple pages and grouped on each page.
e. Navigate to each page by selecting the page hyperlink under the Questions section in the left navigation panel for the event.
f. You may choose to import question responses by using the export/import feature. See the **Bid Response Import/Export Guide** found on the **Questions** page by selecting **Import Options > Get Import Instructions**
g. On each page, click to **Save Progress** or click the **Next** button to save and proceed to the next page.

8. Provide **Item** data, if appropriate.
    a. Navigate by selecting the **Items** hyperlink in the left navigation panel for the event, or by selecting the Next button when on the last Questions
    b. Items are listed on the **Product Line Items** page and/or **Service Line Items** page. Items may be grouped within the same page. For information on providing responses to items via import, see the Export Items and Import Item Responses exercises.
    c. Items that require a unit price are indicated with a star. (**Note**: If this is an **Auction** event, you will provide prices in the Auction phase. See Providing Item Bids Via the Auction Console)
    d. The Procurement Agent may allow you to edit the Quantity of some product or service items.
    e. You will also see an indication if an estimated delivery is required. This may be a specific date or a number of days after the award that delivery is expected.
    f. For service line items, enter an optional estimated service start/end dates, or number of days after the award the service will be performed.
    g. Enter a comment for each item, if appropriate.
    h. If the Procurement Agent has configured **Price Component** fields, enter the appropriate values for fees (which will be added to the unit price) or allowances

(which will be subtracted from the unit price) for each item. If such fields do not apply, select to provide an All-In Price for the item.

i. If the Procurement Agent has configured an item to allow alternates, select the Add Alternate Item if you would like to provide a similar item in your bid response. This may be in addition to or instead of the response to the original item. You may enter up to five alternates per item.
    i. Provide a **Name** for the item. This field is required.
    ii. Enter an optional **Description** for the item.
    iii. Enter an optional **Catalog Number** for the item.
    iv. The **Quantity**, **Unit of Measure**, and **Requested Delivery** information must be the same as the original item, and therefore is read-only.
    v. Enter a **Unit Price** for the item. This field may be required. (**Note**: If this is an **Auction** event, you will provide prices in the Auction phase. See Providing Item Bids Via the Auction Console).
    vi. Enter an **Estimated Delivery** (date or days after the award). This field may be required.
    vii. Enter optional **Comments** about the alternate item.
    viii. Enter optional or required information for any **Additional Fields** the Procurement Agent has included on the event items.
    ix. When finished, click **Save Changes**.
    x. The page will refresh, indicating the **ALT** item below the original item.

j. If the Procurement Agent has provided **Additional Item Information**, you can enter responses directly on the page.

k. You may choose to import item responses by using the export/import feature. See the **Bid Response Import/Export Guide** found on the **Items** page by selecting **Import Options > Get Import Instructions**.

l. On each page, click to **Save Progress** or click the **Next** button to save and proceed to the next page.

9. Ask a **Question** of the Procurement Agent regarding the event.
    a. This action can be done at any time, as long as the Q&A Close Date has not passed and the event is still open.
    b. Navigate by selecting the **Q&A Board** hyperlink in the left navigation of for the

event.

c. Click the button to **Ask a Question**.
    i. Enter a **Subject** for the question.
    ii. Enter the **Question** text.
    iii. Click to **Submit Question**.
    iv. Question is recorded on the Q&A Board. If enabled, you will receive a notification when the Procurement Agent responds to the question.
    v. You may select the hyperlink to **Withdraw this Question** up until the time it is answered.
    vi. View questions and answers from others that the Procurement Agent publishes by selecting the Public Q&A tab on the Question & Answer board.

10. **Review and Submit** your response for the event.
    a. Select the **Review & Submit** hyperlink in the left navigation for the event.
    b. Any incomplete items are indicated with a warning message, with a hyperlink to navigate to the appropriate area.
    c. You do not have the option to certify or submit a response if you have not completed all required items.
    d. Once required items are completed:
        i. Select the checkbox **certifying** the statements you've made to be true.
        ii. Click **Submit Response**.
11. The page refreshes with a confirmation that your response was submitted. You may select to return to the event or to the Procurement Agent portal home page.
12. If you have the **Confirmation that the Supplier Has Submitted A Bid** notification enabled, you will also receive an email confirming that the Procurement Agent has received the bid response. See **Notification Preferences**, additional information about enabling or disabling email and in-app notifications.

Question Responses

As part of a sourcing event, the Procurement Agent may include a list of questions for the supplier that require a response. Suppliers may respond to questions directly through the application, or may choose to export the questions (and any existing responses), populate answers in the file, and then import the information back into the application. This allows multiple staff to review the requested information and provide input without having to log into the application.

When responding through to Event, simply choose from the options provided for the questions, or enter in a free-form text response. Types of responses you may be asked for include:

- Yes or No
- A text value of up to 100 characters, or a text value of up to 2000 characters. If you attempt to enter more than the maximum amount of characters, you will receive an error message and allowing you to edit the data. You will not be allowed to save a value that is over the character limit.
- The Quantity of the item the Procurement Agent would like for the event.
- Select a single value from a dropdown list provided.
- Select several values from a list provided.
- A number
- A date
- Grouped data such as insurance information
- A file upload (up to 50mb)

Detailed information for exporting and importing question bid responses is available in the **Bid Response Import/Export** guide. You can download this guide from the **Questions** page by selecting **Import Options > Get Import Instructions**.

Event Questions Prepopulated from Registration Profile

Procurement Agent may choose to include Registration Profile questions in the Sourcing Event. When a user selects "Yes I Intend to Participate" for a sourcing event, some question responses will be automatically populated on the event form from the data contained in the associated fields within that Supplier's Registration Profile. The questions associated with any empty fields in a supplier's registration profile will remain blank. The user can manually enter data to answer these questions. If the empty field has an associated drop-down list in the Supplier Registration Profile, users will choose their answer from this drop-down list.

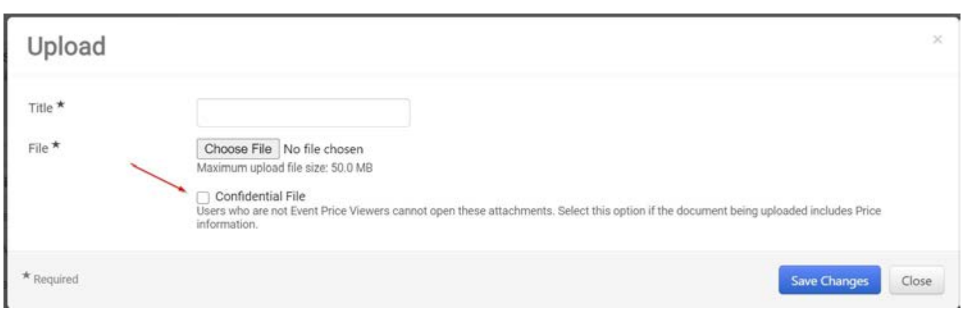
Procurement Agent can associate Supplier Profile **Grouped Data Sets**, such as insurance information, to a set of sourcing event questions. The first set of values for the grouped data found in the supplier profile is auto- populated to the associated set of event questions. If there is more than one group with the same name in a supplier's organization, supplier users will see a link labeled **Apply different responses from your Company Profile** beside the grouped field header. Clicking this link allows users to select a different set of group values for the associated event question responses.

Users can edit any of the data on the event form that has been populated from their Supplier Registration Profile. Supplier users can send data updates for certain question fields to their Supplier Profiles directly from within the event if they have the **Edit Company Profile** permission. The following profile field information can be updated from within the event:

- Number of Employees
- DUNS Number
- Website
- Business Description
- To update their Supplier Profile, users with the appropriate permission can click the **Update Profile** box located directly beneath the fields that can be updated from within the **Questions** section of the event.
- Changes to the Supplier Profile are logged in the event's **History** area in the Supplier's Network.

File Upload Questions

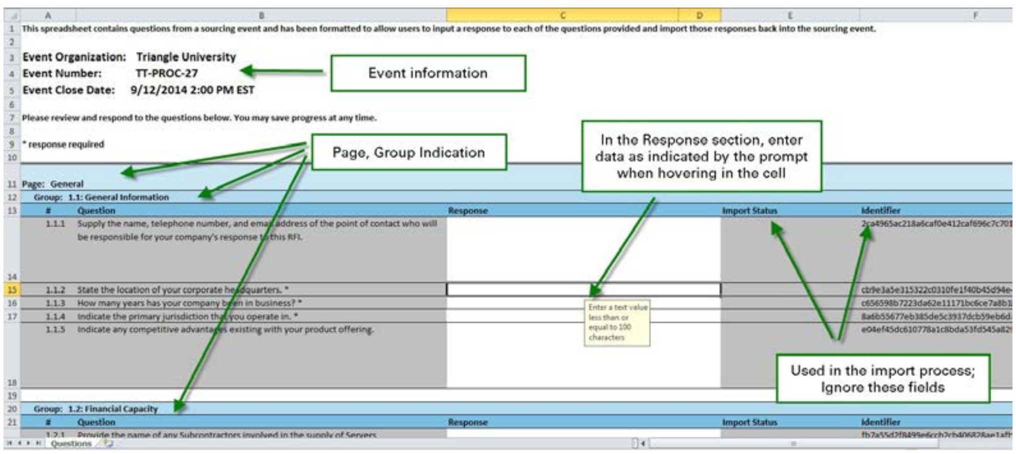
If a Question requests or requires a **File Upload** response, the overlay contains a **Confidential File** checkbox.



When flagged, a Confidential displays beside the uploaded file and at the top of the page. Files flagged as confidential can only be accessed by Procurement Agent users with specific permissions to view pricing data.

The Questions Template

The Questions template is available blank or with responses that have already been provided.



Note the following components of the Questions Export/Template File:

- Event Information - including the organization, Event name and number, and Close date/time.
- The Page and Group indications correspond to how information is presented in the application.
- # and Question as listed in the application. You cannot edit these fields. Questions that require a response in order to submit a bid are indicated with an *.
- Response - Here you will enter your responses. As you select the cell, text will indicate to you the type of response that should be provided.
- Import Status and Identifier - These are fields used in the import process, and should be ignored when entering responses.

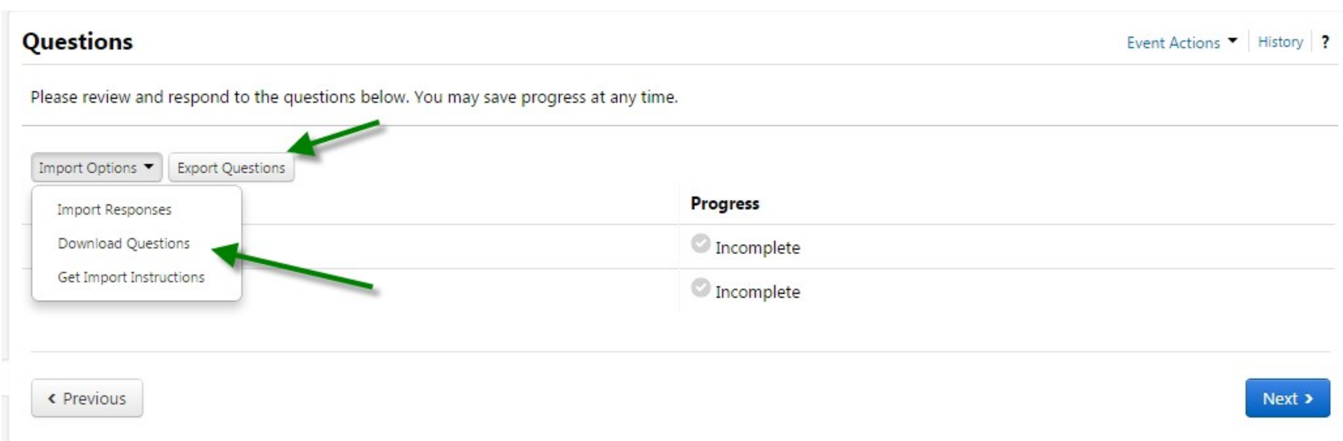
Exporting Questions

You may export question data in the following formats:

- **With any responses already provided**. If some responses have been provided in the UI or via a previous import, you may choose to export a file with those responses so you can change or add to them appropriately. This protects any previous answers you've provided.
- **As a blank template**. If you have entered some responses, they will not be included in the export.

Therefore, whatever you enter in the template file and import will replace all other responses currently in the Event.

The Questions export may be requested by selecting to **Export Questions**, or by selecting **Import Options > Download Questions**. With the **Download Questions** option, you have the ability to download the template without any responses that may have been entered previously.



Step by Step

The goal of this task is to export the questions associated with an event.

Export Questions that includes current responses

1. Navigate to an open Sourcing Event. Make sure you have accepted all required Prerequisites and have declared your Intent to Bid.
2. Select the **Questions** page from the Event's left navigation panel.
3. Select to export questions with responses in either of these ways:

a. Option 1: Select **Export Questions** button. In the **Export Questions** overlay, enter a **File Description**, indicate if you would like to receive an email when the file is ready, and click **Submit**.
b. Option 2: Select **Import Options > Download Questions.** In the **Download Questions** overlay, enter a **File Description**, and select to **Include Response Values**. Indicate if you would like to receive an email when the file is ready, and click **Submit**.

4. You will see a confirmation message that your request has been submitted.
5. Navigate to the **My Exports and Imports** page of the Event from the left navigation panel.
6. The request will be listed with the type (export or template) and the description you entered, along with the status of the request.
7. When the request status is **Completed**, an **Output File** is displayed.
8. Click the **Output File** name to download and open the file.
9. When you have saved the file, click **Delete** to remove it from the list of exports.

Export Questions as a blank template (with no response information)

1. Navigate to an open Sourcing Event. Make sure you have accepted all required Prerequisites and have declared your Intent to Bid.
2. Select the **Questions** page from the Event's left navigation panel.
3. Select to export questions without responses in either of these ways:
   a. Option 1: Select **Import Options > Download Questions.** In the **Download Questions** overlay, enter a **File Description**, and make sure the **Include Response Values** is NOT checked. Indicate if you would like to receive an email when the file is ready. Click **Submit**.
   b. Option 2: If no responses have been entered, you may select the **Export Questions** button. In the **Export Questions** overlay, enter a **File Description**. Indicate if you would like to receive an email when the file is ready and click **Submit**.
4. You will see a confirmation message that your request has been submitted.
5. Navigate to the **My Exports and Imports** page of the Event from the left navigation panel.

6. The request will be listed with the type (export or template) and the description you entered, along with the status of the request.
7. When the request status is **Completed**, an **Output File** is displayed.
8. Click the **Output File** name to download and open the file.
9. When you have saved the file, click **Delete** to remove it from the list of exports.

Preparing Question Responses

Once you have completed an export of questions, with or without responses, you may populate the file in order to import into the application. Please note the following when providing responses in the Question file:

- **You must click to Enable Editing at the top of the spreadsheet.** The file will open in Excel with a banner across the top indicating the file is in Protected View. You must click the **Enable Editing** button in order to enter data and save the file.
- **Required fields are indicated with a star**. Just as required fields are indicated in the application, they are also indicated in the file. You may import the file without the required information; However, the bid response is not considered complete and cannot be submitted until all required information is completed either via the UI or import.
- **Selecting a cell will show helpful information**. Because the type of response requested by the Procurement Agent may vary with the question, help text will explain the format of the information that should be entered.
- **The file responses will override any current responses**. If you see any responses in the file you are using, take care if you change or remove that information. The import file responses will become the responses for the event in the application upon import, and any previous responses will be removed.

When providing responses in the Questions file, fields indicated in white are for your responses. The fields indicated in gray are read-only and may not be edited. Once you have provided the appropriate response information, save the file in .xls or .xlsx format for importing.

Importing Question Responses

Once you have prepared your Question responses and have saved the Excel file, you may import the file back into the Event. Please note the following regarding Importing your data:

- The responses in the import file will override all responses in the application. Importing rows with blank data will remove any current data for those fields.
- An audit history will be captured for changes to responses.
- Any rows with errors will not be imported. All rows without errors will be imported.

The event must still be in an open status. You may want to confirm that no other responses have been entered for the Event questions since your export. Navigate to the event **Questions** page, and select **Import Options > Import Responses**, and following the instructions for importing the file.

Additional instructions are provided in the **Bid Response Import/Export Guide** found on the **Questions** page by selecting **Import Options > Get Import Instructions**.

Step by Step

The goal of this task is to import question responses for an event.

1. Navigate to the Open Sourcing Event for which you need to import question responses.
2. Select the **Questions** page from the Event's left navigation panel.
3. Select **Import Options > Import Responses.**
    a. The **File Action** defaults to **Import**. If you would first like to validate your file for errors without importing, select the **Validate** option.
    b. Enter a **File Description**.
    c. Select if you would like to receive an email when the file is ready.
    d. Click the Choose File button and select the file you have saved for import. Click Submit.
4. You will see a confirmation message that your request has been submitted.
5. Navigate to the **My Exports and Imports** page of the Event from the left navigation panel.
6. The request will be listed with the type (Import or Validate) and the description you entered, along with the status of the request.
7. You may click to **Refresh this Page** until the file has completed processing and displays

a status as follows.

a. **Completed** - The file completed import (or validation) with no errors. All responses in the file are now reflected in the Event. You may review the **Output File** which contains confirmation that all rows were successfully imported.
b. **Completed with Errors/Warnings** - The file completed import but there were some rows with errors. Review the **Output File** to make appropriate corrections.

8. You may view the audit log for changes to responses by selecting the **History** hyperlink on the event.

EXPORTING SOURCING EVENTS

Users with access to view UConn HuskyBuy's Sourcing Event have the ability to export event information. The user may select to export all or only parts of the event. Exports are available on a **View Exports** page in the UConn HuskyBuy portal to display requested export files. Suppliers may choose to enable the Notification Preference for **Sourcing - Exports** to be notified when an export request has been completed.

Any user with access to an event (view or edit) can access the option to **Export Event**. The supplier must have accepted any required prerequisites to view the event in order to see the option to Export from either of the following locations:

- from Event search results, the **View Events** dropdown; and
- when viewing an Event, in the **Event Actions** dropdown.

When selecting to **Export Event**, an overlay displays with the following:

- **Confirmation of the Event** being exported
- **File Name**: This information is required. Enter a name for the file to be exported.
- **Export Description**: Enter an optional description for the export.
- **Content to Export**: Select from these options:
  - All event sections, responses and attachments - With this option, all information in the event will be exported.
  - Let me pick – When selecting this option, the user can choose to export only specific parts of the event information. Only sections pertinent to the particular

event being exported will be shown.

- **Email when export is ready**: You may select to receive an email when the export is ready. The checkbox will be enabled (or not) according to your selection for the **Sourcing - Exports** Notification Preference in your user profile, but can be changed for this export request. Select the **What's This** hyperlink in the overlay for more information. Once the user has submitted the export, a confirmation displays with a link to navigate to the export page.

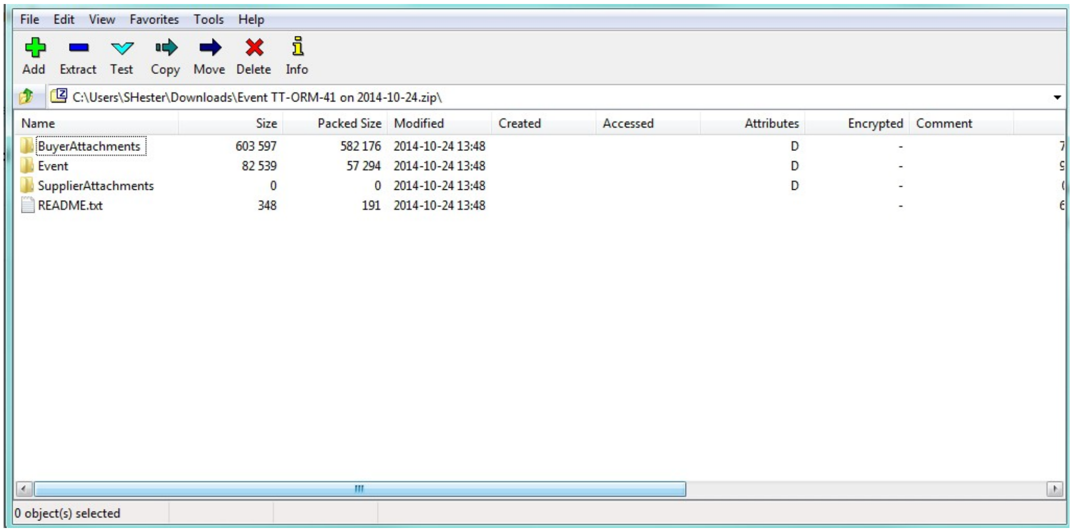
The Exports Page

Exports are located on a new page available at **Sourcing > Sourcing Events > View Exports** in the UConn HuskyBuy portal. Any user with access to view an event will have access to this page. However, a user will only see exports for events to which they have access.

- The status of the export request displays. If it has not completed, the user may select the Refresh this Page option to see an updated status.
- A message displays indicating the number of days before the file will be deleted from the page. You may also select to manually delete an export by selecting the row and clicking **Delete Selected Exports** link.
- Click on the File Name to open or save the zipped file.

The Export File Format

The Event information is exported into a zipped file format, with individual folders and files.



Event folder contains the PDF file with the event information except for attachment and supplier response details. This folder also contains the audit history file for the event.

Procurement Agent Attachments folder contains the attachments the Procurement Agent has added to the event, organized by the page on which they are included.

Supplier Attachments folder contains the attachments the supplier has added to the event.

EXPORTING EVENT HISTORY

The Event History may be exported as a single file. When viewing an event, select the **History** hyperlink to open the audit history window, and then select the **Export CSV** link. The file may be opened or saved immediately.

Step by Step

The goal of this exercise is to export information for a sourcing event. The export request may originate from event search results or from the event. **Note**: The user must have accepted any required prerequisites for the event.

From Event Search Results

1. Refer to the Search for Sourcing Events exercise and view results.
2. Click the drop-down for the **View Event** button, and select **Export Event**.

From Event View

1. Access a Sourcing Event from the Sourcing Event widget on the network or UConn HuskyBuy portal home page, or select an Event from search results.
2. Click the **Event Actions** hyperlink, and select **Export Event**.

Defining the Export Information

3. An **Export Event** overlay displays. The Event to Export is listed.
4. Enter a **File Name**. The file name defaults to the event number and description but may be edited. This information is required.
5. Enter an optional Export **Description**.
6. For **single stage events**, select the **Content to Export**:
   a. **All event sections, responses and attachments** - With this option, all information in the event will be exported.
   b. **Let me pick** - When selecting this option, the user can choose to export only specific parts of the event information. Only sections pertinent to the particular event being exported will be shown.
7. For **multi-stage events,** select the **Content to Export:**
   a. **Current Stage: All Sections, Responses and Attachments**. With this option, only the current stage information will be exported.
   b. **Event: All Stages, Sections, Responses, and Attachments**. With this option, all of the event stages will be exported. The information for each stage will display in separate folders in the zip output file.
   c. **Customize Export**. Choose this option to select specific stages and/or specific event sections to include in the export request. Additional options will display as listed in step **6**.
8. **Email when export is ready**: You may select to receive an email when the export is ready. The checkbox will be enabled (or not) according to your selection for the **Sourcing – Exports** Notification Preferences in your user profile, but can be changed for this export request. Select the **What's This** hyperlink in the overlay for more information.
9. Click to **Submit** the export. A confirmation displays with a button to navigate to the

export file page.

10. On the **Sourcing > Sourcing Events > View Exports** page, click the **Refresh this Page** button until the status of the export shows as **Completed**.
11. Click to download the zipped file, and select to open. Access the files in the folders as needed.

Export Event History as a Single File

1. You may export Event History as a single file, without have to export all other event information. To access the audit history, select an event to view.
2. Select the **History** hyperlink to open the audit history window, and then select the **Export CSV** link.
3. Select to save the file or open immediately. The file is not generated to the View Exports page.

Q & A BOARD

Each event has a Question & Answer (Q&A) Board available to enhance communication between Procurement Agents and suppliers. In the Q&A Board:

1. UConn HuskyBuy Procurement Agents can...
   - Effectively monitor, review, select and answer questions submitted by suppliers.
   - Submit questions directly to suppliers.
   - Respond publicly to all suppliers or privately to specific suppliers.
   - Define the allowable time frame for event question submissions.
2. Suppliers can...
   - Submit questions to Procurement Agents.
   - Respond to Procurement Agent questions and responses.
   - Ask follow up questions to Procurement Agent responses.

Access the Q&A Board by selecting the **Q&A Board** link on an Event. Questions and answers can be posted until the Event-configured **Q&A Submission Close Date** for the event. The Q&A Board is organized into three tabs:

1. **Public Q&A** - contains event questions/answers that have been made public by the

Procurement Agent. All suppliers who have access to the event can see questions/answers that have been made public. Questions/Answers that are not made public are only seen by the supplier who asked the question.

2. **My Questions** - contains event questions and responses that the supplier has entered.
3. **Procurement Agent Questions** - contains event questions and responses that the Procurement Agent has submitted directly to the supplier.

To ask a question, click the **Ask a Question** button and enter a title and text for the question. You may select to **Withdraw This Question** up until the Procurement Agent responds. When a Procurement Agent has responded to a question, you can click to **Ask a Follow Up Question** related to the response. Questions and responses show when the question/response was entered and by whom, except for public questions which do not show the supplier who asked the question.

In the **Attachment** field, suppliers and Procurement Agents can upload a document to a question or answer. There is a maximum of one attachment per question or answer. A link to the file is displayed next to the question or answer on the Q&A Board.

- Anyone who can view a question or answer on the Q&A Board can view, upload, or download its attachment.
- When a Procurement Agent responds publicly to a supplier question that has an attachment, they have the option to remove the supplier attachment before posting publicly.

You may subscribe to receive an email or notification when a Procurement Agent asks a question, responds to a question from you or responds to a question that is public. To set notification preferences, navigate to your User Profile in the JAGGAER ONE Supplier Network.

My Exports and Imports

The **My Exports and Imports** page provides status information and download files for the Questions Items export and import requests you have made. You will see an indication of how long files will be available on the page. A best practice is to download and save the file for your own use so it is readily available when needed.

PROXY BID RESPONSES TO EVENTS

To allow more flexibility in the bidding process, a Procurement Agent may configure a sourcing event to allow proxy bids. The proxy bid allows the supplier to mail, email or phone in a bid to the Procurement Agent. The Procurement Agent may then access the sourcing event as a supplier would see it in their portal, thereby making it easier to complete the bid information online on the supplier's behalf. The supplier will receive an email notification when a Procurement Agent begins entering a proxy bid for a sourcing event. The supplier may continue to respond to the event as well. The supplier should enable the **Proxy Bid has been received by the Procurement Agent** selection in <u>Notification Preferences</u>.

EVENT AMENDMENTS FROM PROCUREMENT AGENTS

A Procurement Agent may decide to amend an event once it is open to suppliers. They may need to add more information, ask another question, or add items for bidding. Whether or not you have submitted your response, you will be made aware of the amendments and be given the opportunity to update your responses.

A supplier user with access to a sourcing event will receive an email and in-app notification when a Procurement Agent amends an open event. You can view the amendments by selecting the hyperlink **View amendment changes**.