

Supplier's Guide to PowerAdvocate[®] Sourcing Intelligence[®]

February 2017

Copyright 2006 – 2017 Power Advocate, Inc.

PowerAdvocate, the PowerAdvocate logo, Category Intelligence, Contract Intelligence, Cost Intelligence, Market Intelligence, Sourcing Intelligence, Spend Intelligence, Supplier Intelligence, iGrid, GridFlow, and Energy Intelligence Platform are trademarks and service marks of Power Advocate, Inc. Other trademarks are the property of their respective owners.

CONFIDENTIAL — This document and its contents are the confidential property of Power Advocate, Inc. (“PowerAdvocate”), and made available solely for the business-related use of employees and agents of licensees of Power Advocate who are authorized and registered as Users of PowerAdvocate Sourcing Intelligence. All other uses, including, without limitation, copying, distributing, and modifying this document, in whole or in part, are strictly prohibited.

Contents

Getting Started	1
Welcome to PowerAdvocate Sourcing Intelligence®	1
Logging In	2
Getting Around	3
Editing Your User Profile	5
Managing Your Company Profile	7
Getting Help	12
About Bid Events	13
About Bid Events	13
About Event States	15
Finding Supplier Opportunities	16
Using PowerAdvocate Messaging	17
Participating in Bid Events	23
Monitoring Event Status	23
Downloading Buyer Documents	24
Completing Datasheets	25
Uploading Documents	26
Managing Documents	27
Participating in Auctions	29
About Auctions	29
Auctions: Status	30
Auctions: Placing Bids	31
Auctions: Bid Scoring Example	33

Auctions: Bid History	34
Auctions: Messaging	35

Index	37
--------------	-----------

Getting Started

Welcome to PowerAdvocate Sourcing Intelligence®

PowerAdvocate allows suppliers to participate in online bid events for a variety of products and services. The PowerAdvocate Sourcing Intelligence platform streamlines the bid event process for our customers, enabling them to conduct sourcing efforts in less time and expedite awards to the successful suppliers. Participating suppliers range from small businesses to global industry giants.

Being a part of the PowerAdvocate supplier community allows suppliers to easily access and manage their current and past documents simply by logging into our website. In addition, PowerAdvocate often makes recommendations for additional qualified suppliers to our customers. Whether it's a one-time purchase or a long-term partnership, PowerAdvocate enhances the relationship between buyers and suppliers.

Logging In

You access the PowerAdvocate platform via a web browser.

To log in

1. Open a web browser and go to <http://www.poweradvocate.com>.

PowerAdvocate functions in most web browsers; however, using browsers other than Internet Explorer 9+, Firefox, or Chrome may cause certain functionality to work unexpectedly. Should you encounter problems, PowerAdvocate support may be unable to provide assistance until the issue has been replicated in a supported browser.

For information see the PowerAdvocate browser support page at <http://marketing.poweradvocate.com/company/customer-support>.

2. Click **Login**.

The Login page appears; you may wish to bookmark it for quick access.

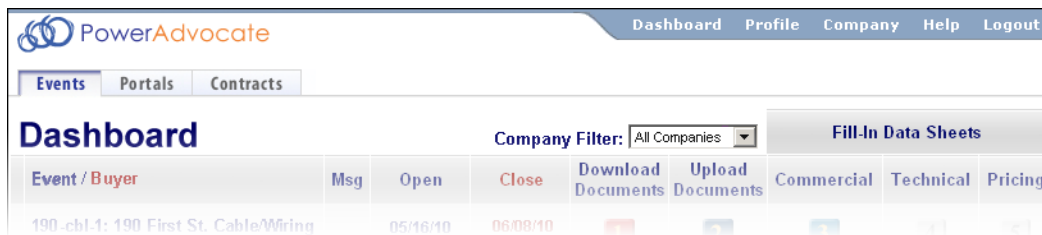
If you do not have an account, click the **Registration** link at the top of the page.

3. Enter your account **User Name** and **Password** (both are case-sensitive).

If you have an account but do not remember your user information, click **Forgot User Name** or **Forgot Password** and they will be emailed to you.

4. Click **Login**.

Your “Home” product’s [Dashboard](#) appears — Contract Intelligence (**Contracts** tab), Sourcing Intelligence (**Events** tab) or Supplier Intelligence (**Portals** tab).



If Sourcing Intelligence is not your Home product, you can [edit your user profile](#) and select it.

Getting Around

PowerAdvocate Sourcing Intelligence uses some standard navigation mechanisms across the site:

Navigation Bar

The main navigation bar in the upper-right hand corner of your browser is always accessible.



If the buyer also subscribes to PowerAdvocate Contract Intelligence, you will see **Events** and **Contracts** tabs above the Dashboard. Click **Events** to view your Sourcing Intelligence Dashboard, if it is not displayed by default; you can [edit your user profile](#) to set the default tab.

About the Dashboard

The **Events** tab on your Dashboard displays all bid events to which you have been invited. You see the Dashboard when you first log in to PowerAdvocate Sourcing Intelligence, and you can return to it at any time by clicking the **PowerAdvocate** logo located in the upper-left corner of your browser window. Also, if buyers choose to open their events to all PowerAdvocate suppliers, an **Opportunities** tab allows you to preview and request access to those events.

A horizontal line divides the event (or offering) list by [state](#): Open events and Pending Pre-Bid events are listed above the line in ascending order by Close date; Pending (non-Pre-Bid) and Closed events are listed below the line in descending order by Close date.

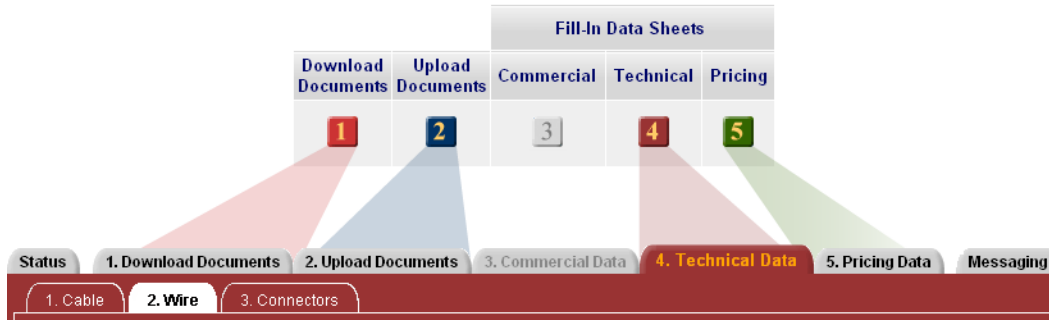
If the buyer also subscribes to PowerAdvocate Supplier Intelligence™ or Contract Intelligence™, you may see **Portals** and **Contracts** tabs for accessing those Dashboards.

The screenshot shows the PowerAdvocate Sourcing Intelligence Dashboard. At the top, there is a navigation bar with links for Dashboard, Profile, Company, Help, and Logout. Below the navigation bar, there are tabs for Events, Portals, and Contracts. The main content area is titled 'Dashboard' and features a 'Company Filter' dropdown set to 'All Companies' and a 'Fill-In Data Sheets' section. The dashboard displays a table of events with columns for Event/Buyer, Msg, Open, Close, Download Documents, Upload Documents, Commercial, Technical, and Pricing. Three events are listed: '190-cbl-1: 190 First St. Cable/Wiring' by Electric Power Utility, 'T42g: Colorado River Sluice Gates' by Great Western Utilities, and '1998-01: Grid Expansion' by Electric Power Utility. Annotations with red arrows point to various elements: 'Click to view Supplier Intelligence Dashboard' points to the Events tab; 'Click to view Contract Intelligence Dashboard' points to the Contracts tab; 'Buyer filter' points to the Company Filter dropdown; 'Navigation bar' points to the top navigation links; 'Buying entity' points to the event name; 'Click to view the event's Status tab' points to the event name; 'Number of unread/total messages' points to the 'Msg' column; 'Click to view the event's Messaging tab' points to the 'Msg' column; 'Click numbers to view event tabs' points to the colored numbers in the Download Documents column; 'Datasheet available' points to the colored numbers in the Upload Documents column; 'No datasheet available' points to the greyed-out numbers in the Commercial, Technical, and Pricing columns; 'Open & Pending Pre-Bid events' points to the top two rows of the table; and 'Pending (no Pre-bid) and Closed events' points to the bottom row of the table.

Event / Buyer	Msg	Open	Close	Download Documents	Upload Documents	Commercial	Technical	Pricing
190-cbl-1: 190 First St. Cable/Wiring Electric Power Utility		05/16/10 8:00 AM EDT	06/08/10 4:00 PM EDT	1	2	3	4	5
T42g: Colorado River Sluice Gates Great Western Utilities	1/1	04/04/10 10:00 AM EDT	06/30/10 4:00 PM EDT	1	2	3	4	5
1998-01: Grid Expansion Electric Power Utility		09/01/10 8:00 AM EDT	12/29/10 4:00 PM EST	1	2	3	4	5

Buttons

The numbered buttons on your [Dashboard](#) provide access to the corresponding event tabs. If a buyer has not created a particular type of datasheet for the event, that button and its associated tab will be disabled (grayed out, e.g., **3**).

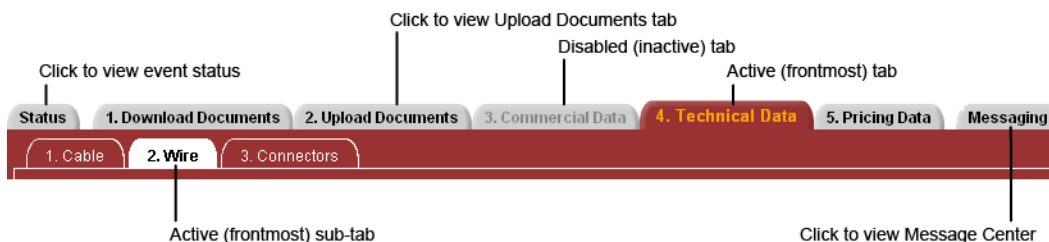


If an event uses [messaging](#), you can also access your **Messaging** tab by clicking the link in the **Msg** column.

Tabs

Tab-based navigation is used to view different aspects of an event; the event name, Open and Close times, the buyer, and the buyer contact are listed above your navigation tabs. Events with multiple datasheets may have a sub-tab for each datasheet; some tabs, such as **1. Download Documents**, have sub-tabs for **Pre-Bid**, **Bid**, and **Post Bid** periods as appropriate. The foremost tab (or sub-tab) is always highlighted.

The **Status**, **1. Download Documents**, **2. Upload Documents**, and **Messaging** tabs are always visible and enabled. The **datasheet** tabs (**3. Commercial**, **4. Technical**, and **5. Pricing**) may be disabled (grayed out) if the buyer has not created that respective datasheet type for the event. If you are invited to an auction, the **6. Auction** tab appears in the event tab view (you can access it by clicking **5** if no Pricing Datasheet exists, otherwise it is not directly accessible from the Dashboard).



If you are participating in a multi-round event, links to each round are to the right of the event name. The Dashboard displays only the event's current round.



Editing Your User Profile

Your user profile contains account information such as your password and contact information. To update your profile, click **Profile** on the navigation bar.

To edit your profile

1. Click **Profile** on the blue navigation tab located in the upper-right corner of the screen.
The Edit Profile page appears.
2. Edit your profile information:

Item	Description
Contact/User Information	
User Name	Your registered User Name (the name with which you log in to the PowerAdvocate Platform); it is read-only and cannot be changed.
Status	Your account status: Active , Inactive , Pending , or Suspended .
User Flag	Your account role: Buyer or Supplier .
Name	Your name as it will be displayed to other users. Enter your First Name and Last Name ; entering a salutation or Middle Name is optional.
Title	Your job title.
Email Address	Your email address — this is the address to which the system and other users send email.
Phone	Enter your primary contact Telephone number; this number is displayed alongside your name throughout the system. Entering a Cell Phone or Fax is optional.
Mailstop	Enter your mailstop if necessary.
Time Zone	Select your time zone to use for scheduling, etc.; all time displays are adjusted to this time zone.
Employee ID#	Your assigned employee ID number, used for reporting. This field is optional and is assigned by your employer, not PowerAdvocate.
Password Information	
Password / Confirm Password	Your password, used with your User Name to log in to the system. Passwords must be at least 8 characters long and must contain at least two of the following three character types: numbers, symbols, or special characters. Depending upon your company's security policies, your password may be set to expire periodically, at which time you will be prompted to enter a new password.
Question / Answer	If your company's security policies require it, you may be required to select and answer three security questions to be used when resetting your password. Answers must be at least three characters long and are not case-sensitive.
Product Information	
Product	Displays the PowerAdvocate products to which your Buyers subscribe. If you are subscribed to Contract Intelligence, you may opt to receive an Email Notification prior to a contract Due Date.

Item	Description
Home	Select the product Dashboard to display when you first log in.
Preferences	
Do you wish to be notified when new message activity is available?	<p>Sets your default messaging notification preference for Sourcing Intelligence.</p> <ul style="list-style-type: none"> ■ Yes: Email is sent to your email address whenever you receive an event message. ■ No: You are not notified of event messages. <p>You may override this setting on a per-event basis from the Messaging tab.</p>
Company/Address Information	
Company	Your Company Name is read-only on this page; to make company changes, click Company on the blue navigation tab located in the upper-right corner of the screen.
Select a Different Address	By default, the Address fields display your current address and Edit Existing Address is selected in this box. Select a different address and click Update Information , after which the Address fields update to reflect the new address.
Country Address 1/2 Town/City State/Province Postal Code	Your current address.
Address Type	Select Business Office or Home Office .
Site Type	The type of site at this address, such as Production Facility or Sales Office .
Site Name	The name of the site at this address (optional).
Site Description	The description of the site at this address (optional).

3. Click **Update Information**.

Managing Your Company Profile

Your company profile includes contact information, a list of products and services provided, and Diversity Supplier information, which Buyers on the PowerAdvocate platform can view. To update the profile, click **Company** on the [navigation bar](#).

To edit your profile

1. Click **Company** on the Dashboard navigation bar.
The Company: Request to Edit page appears.

Company: Request an Edit to Sample Chemical Company Information

Use this page to submit requests to update your company's existing profile. For each section below, click Update or Add New if changes are needed. After you save your changes for each section, you must click the Submit Update button at the bottom of the screen. If no changes are needed, click Cancel. To discard any proposed changes and return to the original profile information, click the Reset button.

Primary Information Update

Company Name: Sample Chemical Company
 DUNS:
 Website: www.chemexample.com

Address Add New

Address	Address Line 2	City	State/Province	Zip Code	Country	Site Name	Site Telephone	Actions
700 N. 70th Street		East Bend	Indiana	46221	United States	Fairfield, NJ	888-555-4000	✎ ✖
Zero Clinton Circle		Exeter	New Jersey	07000	United States		888-555-6000	✎ ✖

Products and Services

Update My Products and Services



Diversity Supplier Classification

Update My Diversity Supplier Classification(s)

Comments

Cancel Reset Submit Request

- Update the profile as necessary:

Item	Description
Primary Information	The company's name, DUNS, and web URL. Click Update to edit the Primary Information .
Address	Addresses and contact information for each of the company's sites. Click  to edit or  to delete existing addresses, or click Add New to add a new company address .
Products and Services	The company's offerings. Click Update My Products and Services to add or remove products or services .
Diversity Supplier Classification	The company's diversity classification. Click Update My Diversity Supplier Classification to add or remove classifications .

To revert the company profile to its original state, click **Reset**, or click **Cancel** to go back to the Dashboard without submitting any changes.

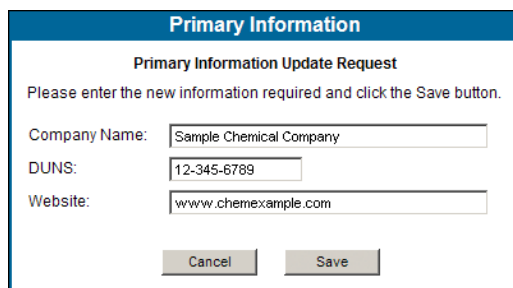
- In the **Comments** section, enter a brief explanation of the changes you are submitting and why. If you provide your contact information, PowerAdvocate Support can contact you directly with any questions
- Click **Submit Request**. PowerAdvocate Support will review your changes and update the company profile (or contact the company if there are any questions or issues).

Updating Primary Information

You can modify key company information as necessary.

To update primary information



- From the Company: Request to Edit page (click **Company** on the navigation bar), click **Update** in the **Primary Information** section. The Primary Information pop-up appears.



The screenshot shows a pop-up window titled "Primary Information" with a subtitle "Primary Information Update Request". Below the subtitle, it says "Please enter the new information required and click the Save button." There are three input fields: "Company Name" with the value "Sample Chemical Company", "DUNS" with the value "12-345-6789", and "Website" with the value "www.chemexample.com". At the bottom of the form are two buttons: "Cancel" and "Save".

- Make changes as necessary.
- Click **Save**.
- Continue [making profile changes](#) as necessary on the Company: Request to Edit page.

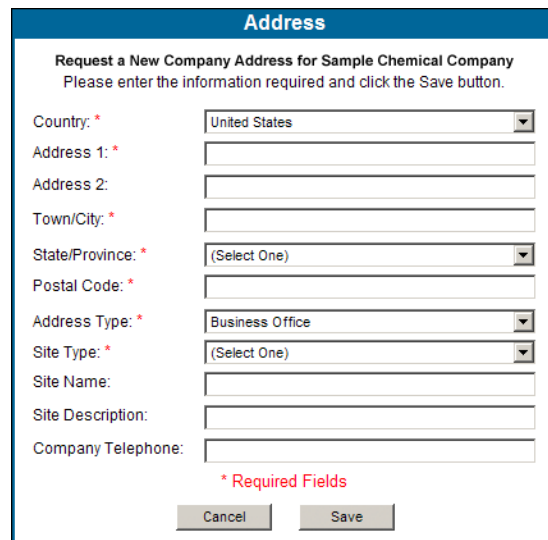
Adding a Company Address

You can add company addresses as necessary. You can also edit () or delete () existing addresses directly from the Company: Request to Edit page.

To add a company address

1. From the Company: Request to Edit page (click **Company** on the navigation bar), click **Add New** in the **Address** section.

The Address pop-up appears.



Address

Request a New Company Address for Sample Chemical Company
Please enter the information required and click the Save button.

Country: *

Address 1: *

Address 2:

Town/City: *

State/Province: *

Postal Code: *

Address Type: *

Site Type: *

Site Name:

Site Description:

Company Telephone:

* Required Fields

2. Make changes as necessary.
3. Click **Save**.
4. Continue [making profile changes](#) as necessary on the Company: Request to Edit page.

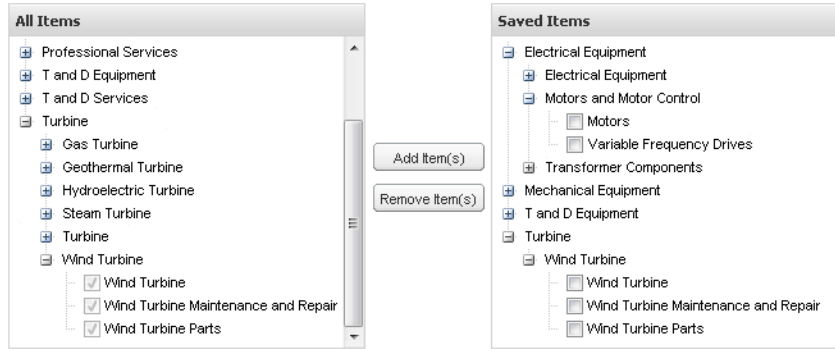
Identifying Products and Services

The Products and Services portal allows you to specify the products and services that your company can provide.

To update products and services

- From the Company: Request to Edit page (click **Company** on the navigation bar), click **Update My Products and Services** in the **Products and Services** section.

The Products and Services portal appears. (Note that a Portals tab is added to your Dashboard if you did not already have one.)



- Make changes as necessary.
 - To add a product or service, select one or more items from the **All Items** panel and click **Add Item(s)**.
 - To remove a product or service, select one or more items from the **Saved Items** panel and click **Remove Item(s)**.
- To [make additional profile changes](#), click **Company** on the Dashboard navigation bar.

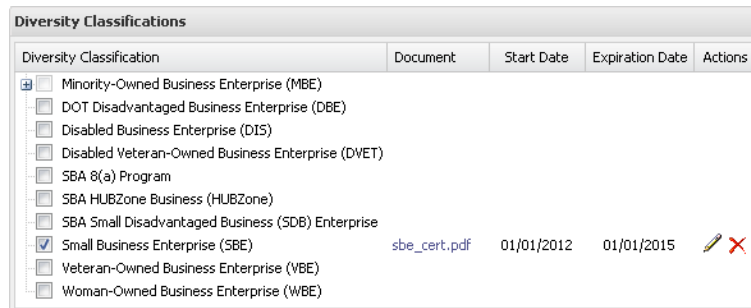
Updating Diversity Classifications

You can add or remove diversity classifications as necessary to reflect those that your company qualifies for.

To update diversity information

- From the Company: Request to Edit page (click **Company** on the navigation bar), click **Update My Diversity Supplier Classification** in the **Diversity Supplier Classification** section.

The Diversity Classifications portal appears. (Note that a Portals tab is added to your Dashboard if you did not already have one.)

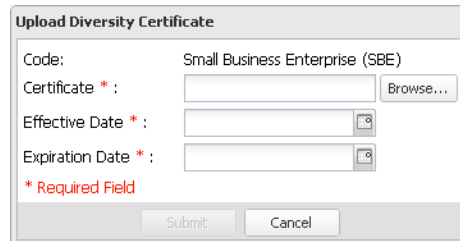


2. Make changes as necessary.

- *To add a Diversity Classification*, check it and upload the proper documentation using the following procedure.

a. Check a **Diversity Classification**.

The Upload Diversity Certificate pop-up appears.



b. Browse to and select a **Certificate**.

You may upload .gif, .png, .bmp, .pdf, .doc, or .docx documents.

c. Enter or select the certificate's **Effective Date** and **Expiration Date**.

d. Click **Submit**.

Once uploaded, click the **Document** link to view it.

- *To remove a Diversity Classification*, uncheck it or click **X** and then click **Yes** to confirm the removal.

3. To [make additional profile changes](#), click **Company** on the Dashboard navigation bar.

Getting Help

Online Help

Online help is available at any time by clicking **Help** on the main navigation bar. If you are viewing the .PDF version of the documentation, the [blue](#) words are clickable links.

Basic Troubleshooting

Following are some common troubleshooting issues:

Logging In

- Both User Name *and* Password are cAsE-sEnSiTivE.
- Make sure that you are not using your browser's "Auto-fill" option, as it may have saved incorrect login information.
- Verify that you are going to <http://www.poweradvocate.com>.


Browser Issues

- Using the back button on browser can cause issues; use the navigation links within the application.
- Make sure your browser settings are set to allow pop-ups from PowerAdvocate.

File and Email Issues

- You cannot upload documents that have special characters (such as * & #) in the name.
- If you send mail from PowerAdvocate Sourcing Intelligence, the message is created in your default email application. Some versions of Microsoft Outlook do not allow commas for separating email addresses. To allow the use of commas go to **Tools > Options > Email Options > Advanced Email Options** and select the **Allow comma as address separator** checkbox.

Contacting Buyers

If you have any questions about an event, click the  link or click the [Messaging tab](#) to compose an email to the buyer contact. A new message opens in your default email application, addressed to the contact, with event name as the message subject. If you are participating in an auction, you can also contact the auction administrator via the [Messaging pane](#) on your **Auction** tab.

Contacting PowerAdvocate Support

You can contact PowerAdvocate support at support@poweradvocate.com or by calling 857.453.5800, Monday through Friday ([excluding U.S. Federal Holidays](#)) from 8:00 AM to 8:00 PM Eastern Time. Current support hours are maintained at <http://marketing.poweradvocate.com/company/customer-support>.

About Bid Events

About Bid Events

PowerAdvocate Sourcing Intelligence is designed to facilitate the planning and management of bid events.

Viewing Event Details

Each event listed on the [Dashboard](#) has at least two active buttons (**1** and **2**) associated with it; click any active button to view the event.



The event header displays the key event details: the event name and number, Open and Close time, and the name of the buyer and buyer contact. This is the person responsible for handling any questions or issues you have with the bid event, and for contacting you regarding the event outcome.

Basic Workflow

The event tabs provide access to everything you need in a bid event. There is no specific order that you must follow, though the basic workflow is:


1. Download the Buyer's documents (**1** > Bid)
2. Upload your proposal and associated documents (**2** > Bid)
3. Fill in datasheets, if present (**3** **4** **5**)

There are a few exceptions:

- Before an event opens, the buyer may require some [pre-bid](#) information, in which case you see **1** > **Pre-Bid** and **2** > **Pre-Bid** tabs. The buyer must approve your participation in the bid event before you can access the **1** > **Bid** and **2** > **Bid** tabs.
- Likewise, after an event closes, the buyer may opt to engage in post bid discussions with selected suppliers. If you are invited to this [Post Bid](#) phase of the bid process, you will see **1** > **Post Bid** and **2** > **Post Bid** tabs.
- If you are invited to participate in additional rounds of bidding, links to each event round appear next to the event title.
- If a buyer is holding a [reverse auction](#), a **6. Auction** tab appears alongside the other event tabs. You can access the auction from **5** on your Dashboard if no Pricing Datasheet exists; otherwise, click any dashboard button to display the event tabs and then click the **6. Auction** tab.

Communicating with Buyers

If you have any questions about an event, you can communicate with the buyer contact in one of two ways:

- For events that use email communication, click the () icon next to the contact's name to compose an email in your default email application.
- For events that use [PowerAdvocate messaging](#), click the **Messaging** tab to [create a message](#) to the buyer.

About Event States

Each event passes through three basic event states from the time a buyer creates it until the time it is completed and the buyer has finished making awards, if any:

- **Pending (Future):** An event is considered pending from the time the buyer first creates it until the time it opens; you cannot take any action or download documents until the event opens. Pending events appear in the lower section of the Dashboard, in descending order by Close date such that events ending latest are listed first.

There is one exception: if the event requires a Pre-Bid period, it appears in the upper section of the Dashboard to indicate that you can access and submit Pre-Bid documents.

- **Open (Present):** Once an event opens, you can begin [downloading](#) the buyer's bid package, [filling out datasheets](#), and [uploading](#) their submittals (or [bidding](#), in the case of [auctions](#)). Open events appear in the upper section of the Dashboard, in ascending order by Close date such that events ending soonest are listed first.
- **Closed (Past):** After an event closes, buyers review suppliers' final submittals and make awards. A buyer may sometimes invite you to a Post Bid phase, in which case you may continue exchanging documents. The buyer is responsible for notifying you of the event outcome, as the system does not provide information about awarded items; the buyer's name and email ([✉](#)) link appear above the [event tabs](#). Closed events appear in the lower section of the Dashboard (beneath Pending events), in descending order by Close date.

Dashboard		Company Filter: All Companies	
Event	Msg	Open	Close
190-cbl-1: 190 First St. Cable/Wiring Electric Power Utility		05/16/10 8:00 AM EDT	06/08/10 4:00 PM EDT
T42g: Colorado River Sluice Gates Great Western Utilities	1/1	04/04/10 10:00 AM EDT	06/30/10 4:00 PM EDT
Today 6/1/10			
1998-01: Grid Expansion Electric Power Utility		09/01/10 8:00 AM EDT	12/29/10 4:00 PM EST
GW113: 224 MVA Transformer [113] Great Western Utilities		07/10/10 8:00 AM EDT	07/17/10 4:00 PM EDT
99364: Site #4 Valve Rebuild Idaho Diesel Ltd.		05/01/10 8:00 AM EDT	05/31/10 11:00 AM EDT
99254: Dual Venturi Vapor Scrubber Idaho Diesel Ltd.		04/18/10 8:00 AM EDT	05/11/10 4:00 PM EDT
NE117.4: Auxiliary Rail Siding Long Haul Freight		04/19/10 8:00 AM EDT	05/03/10 4:00 PM EDT

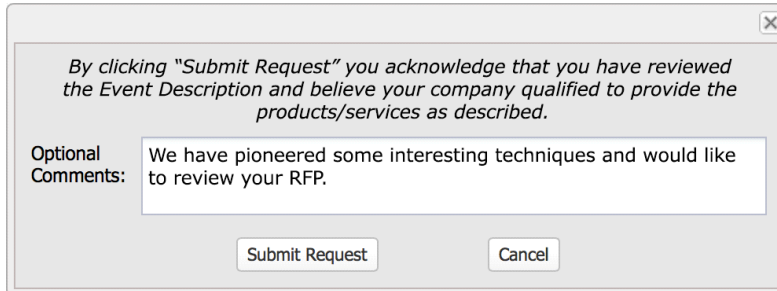
Finding Supplier Opportunities

Buyer companies have the option to make their bid events visible to all PowerAdvocate-registered suppliers. When these opportunities exist, your Dashboard displays an **Opportunities** tab, where you can view some high-level event information.

Events		Opportunities				
Opportunities Dashboard						
	Event Title	Company	Products / Services	Open Date	Close Date	Accessible
+	Actuators	Acme Electric	Controls	08/18/2015 8:00 AM EDT	08/31/2015 4:30 PM EDT	
-	Next-Gen Boiler Upgrade	Universal Energy	Boiler Components	08/15/2015 8:00 AM EST	12/31/2015 4:00 PM EST	
Description: Looking for a cutting-edge implementation for a green building in the planning stages.						
+	Project Simulator	Solar Arrays LLC	Construction Services	08/01/2015 8:00 AM EDT	09/07/2015 4:00 PM EDT	Pending
+	Site 101 Rough-out	Sheridan Builders	Piping	07/01/2015 9:00 AM EDT	12/31/2015 6:00 PM EST	

To request access to a posted event:

1. Click .
A popup appears asking you to verify your qualifications



2. Enter **Optional Comments** to the buyer, if you have something to add.
3. Click **Submit Request**.
The **Accessible** column will display **Pending** until the buyer approves your request. Once approved, the event will appear on your Events tab.
If the buyer does not approve your request, the event will be removed from your Opportunities tab.

Using PowerAdvocate Messaging

PowerAdvocate messaging is designed to support event-specific communication between the buyer team and your supplier team. Supplier teams cannot message each other, and will never see correspondence between buyers and other teams.

If you are invited to an event where the buyer is using messaging, a **Msg** column on your Dashboard indicates the number of [message groups](#) that contain unread messages and the total number of message groups in the Inbox. Events that do not use PowerAdvocate messaging (and have no link in the **Msg** column) use standard email communication.

You may also set a preference to notify you via your external email address if you receive new PowerAdvocate messages; [edit your user profile](#) to set the default, which you can override on a per-event basis

Dashboard						Fill-In Data Sheets		
Event	Msg	Open	Close	Download Documents	Upload Documents	Commercial	Technical	Pricing
10344: Substation #3 Refurb Electric Power Utility	1/3	09/28/07 8:00 AM EDT	10/31/07 4:00 PM EDT	1	2	3	4	5

About Message Groups and Actions

Messages in your **Inbox** are grouped, or threaded, by the message subject. Once a message is created and sent, all replies, forwards, and copies (Cc:) are grouped together. Clicking a message **Subject** (or status icon) on the **Messaging** tab opens a [View Message window](#), from which you can access all messages in that group. The number of messages in a group is shown (in parentheses) in the **Date** column.

The primary contact for each buyer or supplier team is always the intended message recipient; other team members are copied on the message. Message status is indicated by icons in the Inbox and View Message window, and show the read (📧) / unread (📧) status of messages *in the group* (e.g., if one message in a group is unread, an unread icon is displayed).

About the Messaging Tab

Clicking a link in the **Msg** column on your Dashboard takes you directly to the event's **Messaging** tab; otherwise, you can click the **Messaging** tab from within an event:

10344: Substation #3 Refurb **Electric Power Utility**

Open: 09/28/07 08:00:00 AM EDT Close: 10/31/07 04:00:00 PM EDT Time Remaining: 29 days 4 hours 19 mins

Buyer Contact: **Cindy Walsh**

1. Download RFP 2. Upload Proposal 3. Commercial Data 4. Technical Data 5. Pricing Data **Messaging**

Create New Message Search Inbox: Search Send email notifications? Yes No

▼ Inbox (3) New/Unread (1)

Status	Date	From	Company	Subject
	9/29/07 2:58 PM EDT	Peter Holm	Elsbeth International	engineering specialist
	9/29/07 2:53 PM EDT	Cindy Walsh	Electric Power Utility	site visit rescheduled
	9/29/07 2:52 PM EDT (3)	Cindy Walsh	Electric Power Utility	structural specialist

▼ Sent (1)



Date	To	Subject
9/29/07 2:41 PM EDT	Buyer Team	structural specialist

▼ Drafts (1)

Date	To	Subject	Actions
10/3/07 11:19 AM EDT	Buyer Team	datasheet	

This tab has three main sections, called portlets, that display different message categories: **Inbox**, **Sent**, and **Drafts**.

Item	Description
[top]	
Create New Message	Opens a Create Message window.
Search [Inbox]	Enter a search term and click Search to search From, Company, Subject, and Message Body fields as well as attachment descriptions and file names.
Send email notifications?	The Send email notifications? option determines if you will receive email when there is any message activity for this event. This defaults to the selection in your user profile , but you can override that selection on a per-event basis.
Inbox	Displays groups of received messages. The New/Unread heading indicates the number of message groups that contain new or unread messages.
Status	Displays the status of the messages in each group: <ul style="list-style-type: none"> ■ One or more messages are unread ■ All messages are read A icon in the left column indicates that at least one message in the group has an attached file.
Date	The date and time at which the message was sent. A number in parentheses indicates the number of messages in the group, in which case the date and time reflect the most recent message.
From	The message sender.
Company	The sender's company.

Item	Description
Subject	The subject of the message or message group. Click the subject (or the mail status icon) to open the View Message window.
Sent / Drafts	Displays sent messages and saved drafts.
Status	A  icon in the left column indicates that at least one message in the group has an attached file.
Date	The date and time at which the message was sent (or saved, in the case of drafts).
To	The team to which the message was addressed, which is always the [main contact of the] Buyer Team ; suppliers cannot send messages to other suppliers. Members of your team and the buyer team are always copied (Cc:) on messages you send.
Subject	The message subject.
Actions	<ul style="list-style-type: none">■  Deletes a saved draft

Creating New Messages

Suppliers can send messages to, and receive messages from, the buyer team for any event that uses messaging. Messages are automatically addressed to the event contact on the buyer team, and copied (Cc:) to the supplier team and other members of the buyer team. Suppliers cannot message each other.

To create a new message

1. Click the **Messaging** tab from within an event.
2. Click **Create New Message**.

The Create Message window appears. New messages are automatically addressed to your Buyer Contact for the event with a Cc: to the buyer team and your supplier team.

3. Enter a **Subject** line and your **Message**.

Add an attachment if necessary.

- a. Click **add attachment**.


A popup appears.

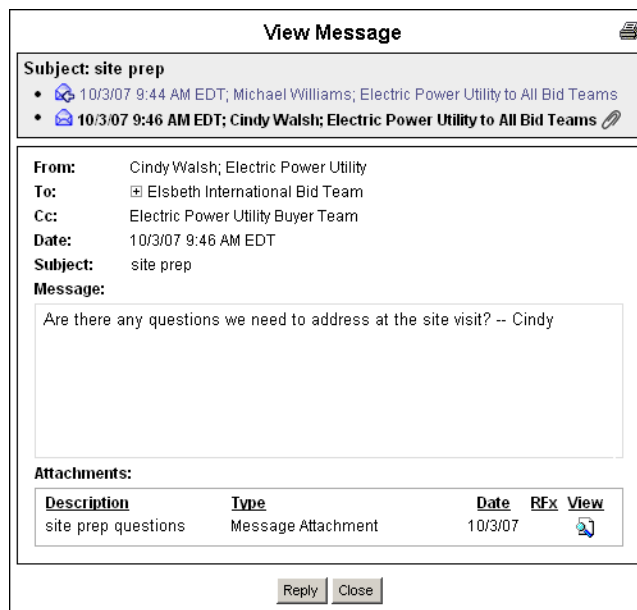
- b. Enter a file **Description**.
- c. Browse to and select the file.
- d. If you wish to have the file added to the **Submittals** tab, select **Check to also include...** and set the **Document Type** and **Issue Date**.
- e. Click **Attach**.






Once attached, you can click to view it or to remove it from the message. A indicates attachments that will be posted on the **Submittals** tab.




4. Click **Send**; you may also click **Save Draft** and continue at a later time.

Viewing and Responding to Messages

From an event's tab, click a message **Subject** or status icon to open a View Message window. From this window you can view or respond to messages in the group. Click the  icon to display the message group in a printer-friendly format.



Item	Description
Subject Thread	
Subject	The message subject; the subject cannot be changed within a thread (e.g., when forwarding or replying).
Messages/Status	The messages belonging to this group. Click another message in the thread to view it. Read messages are in blue text; unread messages are displayed in bold. Black bold text always identifies the message you are currently viewing. The following icons indicate message status: <ul style="list-style-type: none"> ■  Unread message ■  Read message ■  File attached
Message Body	
From	The message sender.
To	The team or teams to which the message was sent; click  to expand the list of names. Any team member may reply to a message.
Cc	The team to which the message sender belongs; click  to expand the list of names.
Date	The date and time at which the message was sent.
Subject	The message subject; the subject cannot be changed within a thread (e.g., when forwarding or replying).

Item	Description
Message	The message body. Text is included, by default, from prior messages in the thread.
Attachments	Lists any file attachments, if present; click  to view a file.
Actions	
Reply	Copies the message text into a Reply to Message window (which works like the Create Message window). Message replies are addressed to the last message sender and copied (Cc:) to the other members of the buyer and supplier teams.
Close	Closes the message window without taking action; changes the status icon from  to  .

Participating in Bid Events

Monitoring Event Status

The Status tab displays your activity for the event you are viewing (including the number of files uploaded and datasheets saved), along with the event schedule.

To view an event's Status tab, click an event name on your [Dashboard](#).

Status

Your Bid Intention: Bidding

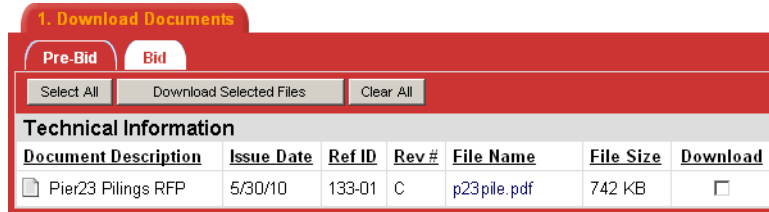
Total Uploaded Files:	1	Last Upload: November 11, 2014
Saved Commercial Datasheets: 0 of 1		
Saved Technical Datasheets: 0 of 2		
Saved Pricing Datasheets: 1 of 1 Last Saved: November 11, 2014		

Schedule

Description	Date
Pre-Bid Meeting	11/14/2014 2:00 PM EST
Open	11/17/2014 2:30 PM EST
Site Inspection	11/20/2014 9:00 AM EST

Downloading Buyer Documents

Once a buyer invites you to participate in a bid event, that event appears on your [Dashboard](#). You can begin downloading the buyer's RFX (a generic term for RFP, RFQ, or RFC) from the **1. Download Documents > Bid** tab after the event opens. If the buyer requires a [Pre-Bid](#) period, you will see only the **Pre-Bid** sub-tab until the buyer approves you for the Bid. Likewise, a **Post Bid** sub-tab appears if the buyer invites you to any [Post Bid](#) activities.



To download Buyer Documents

- From your Dashboard, find the event and click **1** (**Download Documents**).
The **1. Download Documents** tab appears.
- Select the appropriate sub-tab and then select the documents you wish to download (or click **Select All**).
If this is a Multi-Round event, a **Copied From Prev Round** column identifies documents (with a) that were copied over from a previous round.
- Click **Download Selected Files**.
- Click **Start** to download the selected documents.
Documents are saved in a .zip file named BidPackage-*nnnn-n*.zip (where *nnnn-n* is a unique ID).

Completing Datasheets

Buyers often request that you complete datasheets as part of your bid package, in addition to your proposal and other event-related documents. Datasheets allow buyers to collect specific data that can be tabulated and compared across suppliers. If datasheets exist for an event, you access them from your [Dashboard](#) using the [3](#) [4](#) [5](#) buttons, or from the [corresponding datasheet tab](#). If a buyer has not created a particular type of datasheet for the event, that button and its associated tab are disabled (grayed out, e.g., [3](#)).

There are three types of datasheets:

- **Commercial:** Collects information about your company and its policies, warranties, etc.
- **Technical:** Collects specific information about the products and services being procured.
- **Pricing:** Collects pricing data relevant to the event — item prices, service and shipping fees, etc.

4. Technical Data

1. New Datasheets 2. Project Method 3. Bulk Widgets

Field Sampling Tolerance Specifications

Text fields can be used for headings or explanatory text

Sections allow multiple questions to be displayed above or to the left of the input field/selection.

Section with free-form entry fields:

Short Answer fields provide one line for text OR numerical input:

Long Answer fields provide a resizable field for alphanumeric input:

Section with selector fields:

Radio and Checkbox selections can be displayed horizontally or vertically

Select fields allow one answer:

Radio fields allow one answer: Yes No

Checkbox fields allow multiple answers:

Left Right Up Down

Date fields provide a calendar control:

File Upload fields enable file attachments:

	Column 1	Column 2
Row 1	Table cells accept	alphanumeric
Row 2	or numeric input	01234567890

Note: Buyers have a choice of tools for creating datasheets: those from one tool appear as sub-tabs under **1. New Datasheets**, and any additional numbered tabs were created in a different tool. The only difference is that the 1. New Datasheets sub-tabs have a **Submit** button that you can click to indicate that the datasheet is complete.

Click **Printable** to view a printer-friendly version of the page to print for your records.

Cautions

- Be sure to click **Save** before navigating elsewhere, or your data may be lost. Save your work often.
- Answer text fields are limited to 4,000 characters
- Multiple users from the same company cannot simultaneously fill out a datasheet — when one user saves, the work of others will be lost.

Uploading Documents

Once you have reviewed the buyer's **RFX** for a particular **bid phase** (Pre-Bid, Bid, or Post Bid), you can begin uploading your proposal and other event-related documents for the buyer to review.

You may upload as many documents and as many versions as necessary (including .zip archives containing multiple files), as long as all filenames are unique. Once uploaded, you may still **edit** document information or **delete** documents until the bid closes. For Multi-Round events, a **Copied From Prev Round** column identifies documents (with a ✓) that were copied over from a previous round.

You cannot generally upload documents after the bid closes, though some buyers may accept late documents (in which case the **Submit Document** button will be active); if a late submittal is accepted it is displayed in red. Also, note that you may sometimes be asked to upload a file via a **datasheet**.

Document Description	Issue Date	Ref ID	File Name	File Size	Upload Date	Actions
Pier 23 Architectural	6/01/10	133-22	p23 abp.pdf	420 KB	6/01/10	

To upload a document

- From your Dashboard, find the event and click **2 (Upload Documents)**.
The **2. Upload Documents** tab appears.
- From the **Pre-Bid**, **Bid**, or **Post Bid** sub-tab (as appropriate), select a **Document Type**.
Select from Commercial, Technical, or Pricing.
- Optionally, edit the **Issue Date** and **Reference ID**.
- Click **Browse**, navigate to and select a document, and then click **Open**.
Document names appear below **Selected File(s)**. Click **X** to remove a document.
- Browse to and select additional documents as necessary.
- Click **Submit Document** to upload all of the **Selected File(s)**.


Documents appear in the **Bid Submissions** list, categorized by type. If you submit a document with a file name that is not unique or that contains special characters, the file is automatically renamed when uploaded.

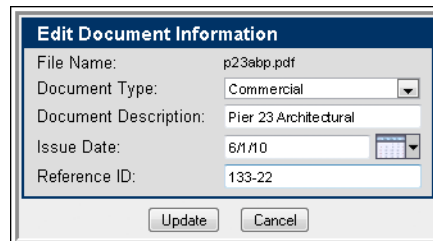
The **Document Description** column displays the file name (without extension) by default. If the file name is not useful as a description, you can click to **edit that field**.

Managing Documents

If you have the proper permissions, you may edit document information after uploading it to your **2. Upload Documents** tab (whether the event is [Open](#) or [Closed \(Post Bid\)](#)); you may also delete documents while the event is still open.


To edit document information

- From your Dashboard, find the event and click **2 (Upload Documents)** and then the **Pre-Bid, Bid, or Post Bid** sub-tab as appropriate.
The **2. Upload Documents** tab appears.
- Click  for the document you wish to edit.
The Edit Document Information window appears.



- Edit the document information as necessary.
You may edit any field except File Name.
- Click **Update**.
The Upload Documents tab is updated with your revised information.

To remove a document

- Find the document and click .
Documents cannot be recovered once deleted.

Uploading Post Bid Documents

After you review any Post Bid documents the buyer may have posted, you can rework your documents as necessary and upload them for the buyer to review from the **2. Upload Documents > Post Bid** tab. Once uploaded, you may still [edit](#) document information or [delete](#) documents. You cannot generally upload documents after the post bid period ends, though some buyers may accept late documents (in which case the Submit Document button will be active).

Participating in Auctions

About Auctions

You may sometimes find yourself invited to another type of bid event, a reverse auction, in which you bid against other suppliers to sell the auction items at [generally] the lowest price. Buyers may place one or more lots up for auction, each of which appears as a sub-tab under the **6. Auction** tab. Each lot has its own open and close time, independent of the event's time schedule; lot schedules will never overlap, however.

When the lot opens, you may begin placing bids. Before submitting a bid, you enter values for different bid parameters specified by the buyer: price is typically one of them, though there may be others. Also, auctions are not governed by price alone — buyers may specify additional parameters that, together with price, are somehow combined to calculate a bid score. Buyers have a great deal of flexibility in configuring auctions and lot parameters: when calculating a bid score, price may not be weighted as heavily as other factors such as a minimum order quantity or delivery time. Therefore, you may not see a direct relation between your score and the answers you provided. See page 33 for an example.

Note that all times displayed are from the PowerAdvocate server, and may be different from the time shown on your local device.

There are four sections that may appear on your **6. Auction** tab:

- [Status](#)
- [Place Bid](#)
- [Messaging](#)
- [Bid History](#)

Auctions: Status

The **Status** pane tracks auction progress. Note that all times displayed are from the PowerAdvocate server, and may be different from the time shown on your local device.

Status: Open	
Official Time*: 06/13 1:02:10 PM (EDT)	Open Time*: 06/13 12:30:00 PM (EDT)
Time Remaining: Closing in 0 days 0 hours 27 minutes 50 seconds	Close Time*: 06/13 1:30:00 PM (EDT)
<small>(*) All times displayed are from the web server and may differ from the time shown on your local device</small>	

Item	Description
Status	The auction status: Pending, Open, or Closed.
Official Time	The official PowerAdvocate server time.
Time Remaining	The time remaining before a Pending lot is open to bids, or an Open lot is closed to bids.
Open Time	The time at which a lot is opened to bids. Note that this time is based on the PowerAdvocate server clock and not that of your local device.
Close Time	The time at which a lot is closed to bids. Note that this time is based on the PowerAdvocate server clock and not that of your local device.

Auctions: Placing Bids

The Place Bid pane displays information about the current bid and allows you to [place your own](#). The buyer's preferences determine the type and amount of information displayed. Bidding may sometimes involve submitting a single price (top image), or may require a combination of factors (bottom image) to calculate the bid score ([see an example](#) on page 33). You may also see your rank in the auction, the leading bid score, or the leading score and parameters.

The buyer also has the option of allowing pre-bids, which allows you to place a bid (via a **Submit Pre-Bid** button) before the lot opens. Buyers can also set a pre-bid deadline that, if missed, prevents you from bidding in the auction.

Place Bid

Current Rank: **3rd**

Your Last Bid Score: **4.00**
Required Bid Decrement: **1**
Current Maximum Allowed Bid: **3.00**

Price

Range: 1.00 to 20.00

Place Bid

Current Rank: **2nd**

Your Last Bid Score: **43.00**
Required Bid Decrement: **0**
Current Maximum Allowed Bid: **42.50**

Score: 43.00

Price (\$/unit)

Range: 1.00 to 40.00

Minimum Order (units)


Range: 1 to 1,000

Bulk Discount? (Qty.)


The Place Bid pane may contain the following fields:

Item	Description
Current/Final Rank	Where your previous bid score stands in relation to other suppliers' scores; a message will indicate if you are tied with another supplier for first place.
Leading Bid	The lowest bid score that has been submitted.
Your Last Bid Score	The last successful bid you placed.
Required Bid Decrement	The minimum amount by which a successful bid must be lower than the current leading bid. If the required decrement is a percentage of the bid, the equivalent bid decrement is also displayed.
Current Maximum Allowed Bid	The minimum bid score that may be submitted.
Score	The score calculated from the current parameter values you have provided.

To place a bid

1. In the **Place Bid** pane, provide all of the bid parameters.
You may need to enter numbers or amounts (in which case the range is given), select items from lists, or select check boxes.
2. If there are multiple parameters, click  to calculate the bid **Score**.
If the **Score** is less than or equal to the **Current Maximum Bid Allowed**, the bid is valid and you may submit it. If not, revise your answers and recalculate your score. The buyer can weight parameters in different ways, so you may not see a direct relation between your parameters and your score. To reload the parameters from your last successful bid, click **Reset**.
3. Click **Submit Bid** (or **Submit Pre-Bid**, if allowed before the lot opens).


Auctions: Bid Scoring Example

Buyers may evaluate auction results by criteria other than price. Buyers may create any number of parameters and weight them in varying ways to end up at a bid score — so you may not notice a direct (or any) correlation between your score and the input you provided. You can test different combinations of options and click  to see the resulting score.

As an example, a buyer is soliciting bids for a particular item, and uses three bid parameters (see the calculations below):

- The first parameter is price, ranging from \$1 to \$40 per unit. The relation between price and score is linear, so that \$35 = 35 and \$38 = 38.
- The second parameter is the minimum number of units that must be ordered, ranging from 1 to 1,000. The relation between quantity and score is weighted such that a low order limit scores higher than a higher order limit, so in this case 500 units = 5 and 750 units = 7.5.
- The third parameter is the number of units that must be ordered to obtain a bulk discount. The buyer weights options such that a low limit scores better than a high limit (or the case where there is no discount), so no discount = 0 and at 1000 units = 3.

These three parameters added together equals the bid score. Setting parameters allows buyers to account for multiple criteria: two suppliers each score 43 based upon the combination of price and discount level.

Score: 

Price (\$/unit) **Minimum Order (units)** **Bulk Discount? (Qty.)**

Range: 1.00 to 40.00 Range: 1 to 1,000

Price (\$/unit) Range: 1 to 40 Score: 1 to 40

Minimum Order (units) Range: 1 to 1000 Score: .01 to 10

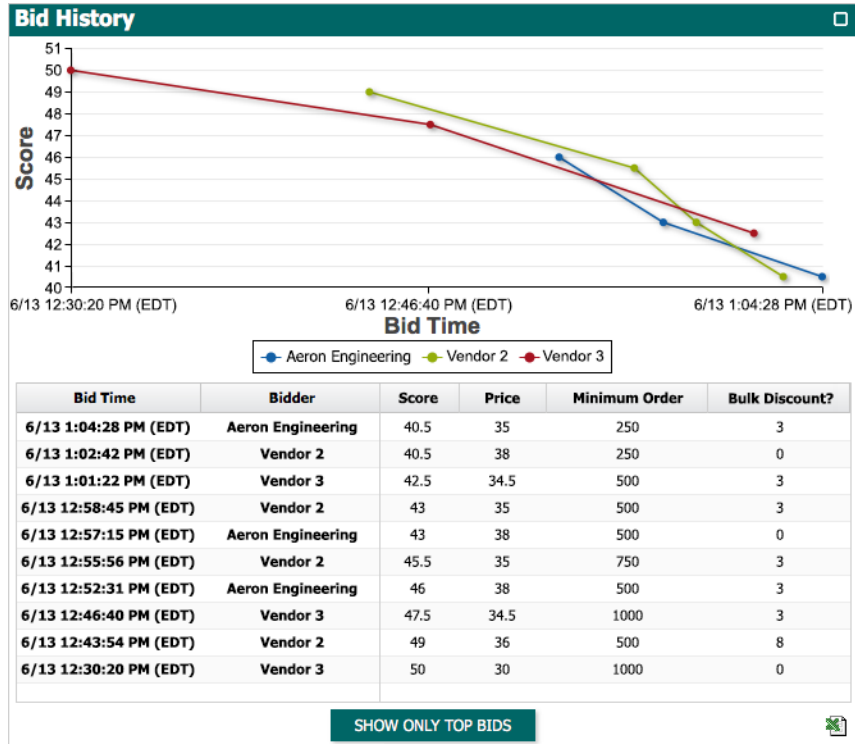
Bulk Discount? (Qty) Option/Score: None: 0 @2500+: 8 @1000+: 3 @500+: 1

\$35/unit = **Score: 35** 500 units = **Score: 5** Discount @1000+ units = **Score: 3**

Bid History					
Bid Time	Bidder	Score	Price	Minimum Order	Bulk Discount?
6/13 12:58:45 PM (EDT)	Vendor 2	43	35	500	3
6/13 12:57:15 PM (EDT)	Aeron Engineering	43	38	500	0

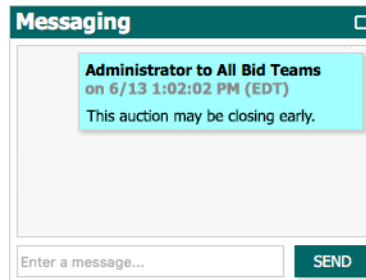
Auctions: Bid History

The **Bid History** pane displays each of your successful bids, the time placed, and your score. Depending upon the options selected by the buyer, you may also see other [anonymous] suppliers' bids and their bid parameters, as well as a graph of those bids. Click **Show Only Top Bids** to display the top bid from each bidder, or **Show All Bids** to toggle back to the default graph.



Auctions: Messaging

The **Messaging** panel displays a transcript of the Administrator's lot-related communication with suppliers (sent to you only, or to all). You can also send messages to the Administrator by typing in the text field and clicking **Send**.



- A -

- addresses
 - adding 9
 - deleting 7
 - editing 7
- attachments
 - adding to messages 20
- Auction tab 29
- auctions
 - about 29
 - bid history 34
 - bid score 33
 - contacting administrator 35
 - messaging 35
 - placing bids 31
 - schedule 30
 - status 30

- B -

- bid history 34
- bid score
 - calculating 31
 - example 33
- bids, placing 31
- buyers
 - corresponding with 14

- C -

- company
 - adding addresses 9
 - diversity classification 7
 - editing profile 7
 - updating addresses 7
 - updating URL 7
- contacting
 - auction administrator 35
 - buyer 14
 - PowerAdvocate 12
 - the buyer 12
- creating
 - messages 20

- D -

- Dashboard
 - about 3
 - buttons 4
 - event states 15
 - messages 17
 - navigation bar 3
 - setting home product 5
- datasheets
 - completing 25
 - tabs 25

diversity classification

 updating 7, 10

documentation

 online 12

documents

 downloading 24

 editing document information 27

 removing 27

 uploading 26

 uploading (post bid) 27

Download Documents tab 24

- E -

email

 editing address 5

 sending 14

event status 23

events

 details 13

 navigation 13

 states 15

 tabs 4

 workflow 13

- F -

forwarding messages 21

- H -

help

 contacting PowerAdvocate 12

 contacting the buyer 12, 14

 online 12

- L -

logging in 2

- M -

messages

 about 17

 actions 17

 attaching files 20

 creating 20

 forwarding 21

 groups 17

 in auctions 35

 on Dashboard 17

 replying to 21

 subject thread 21

 viewing 21

 viewing attachments 21

 writing 20

Messaging tab 17

multi-round events 4

- N -

navigation

 bar 3

 buttons 4

 multi-round 4

 tabs 4

- O -

online help, accessing 12

Opportunities Dashboard 16

- P -

password, editing 5

placing bids 31

PowerAdvocate Sourcing

 introduction 1

 logging in 2

PowerAdvocate Support, contacting 12

products and services
 updating 10
profile
 company
 editing company 7
 user 5

- R -

replying to messages 21

- S -

Status tab 23
support, contacting
 PowerAdvocate 12
 the buyer 12

- T -

troubleshooting, basic 12

- U -

Upload Documents > Post Bid tab 27
Upload Documents tab 26
users, editing profile 5

- W -

workflow 13
writing, new messages 20

