RFx Guidance

How to respond to an RFx

23.11.21

Table of contents

1. Introduction

Introduction

Basics

An RFx is a sourcing event that enables Roche Sourcing Managers to determine your capability to supply a product or a service and the price at which you can supply it.

The term RFx can refer to any of the following:

1. **Request for Information (RFI):** An RFI is sent to new or current suppliers to confirm their ability or willingness to fulfill the Roche organization's requirement
2. **Request for Proposal (RFP):** An RFP is sent to suppliers who are found capable of fulfilling the requirement. It asks for business proposals from the suppliers and may request for additional information regarding the product or service, or the processes followed by the supplier
3. **Request for Quotation (RFQ):** An RFQ invites qualifying suppliers to bid for the requirement and provide price quotes

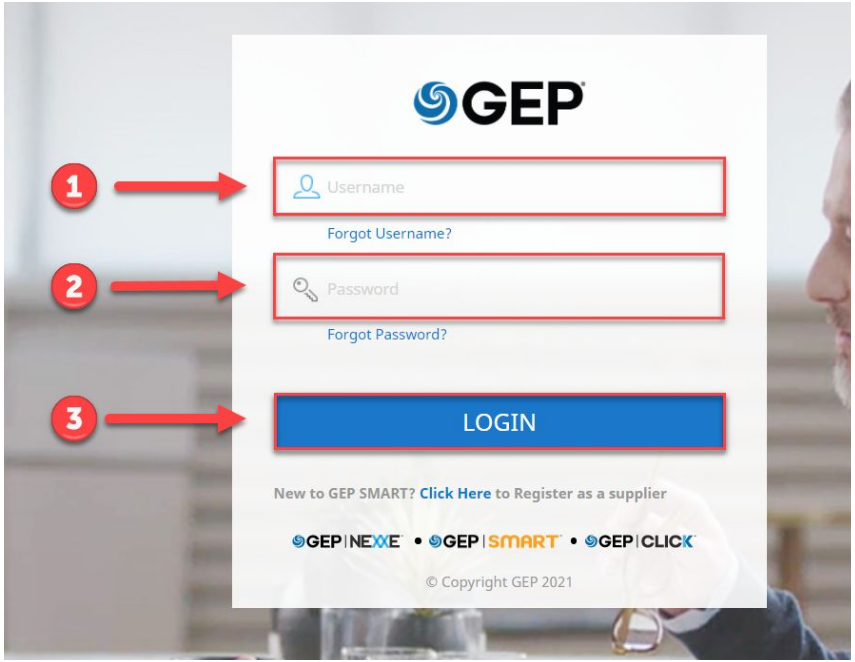
2. Login

Login

How to login into myBuy

Click here to access myBuy

1. Enter your **myBuy user name** here
2. Afterwards, please enter your **Password** here
3. Then click on the **Login** button



3. Access RFx

Access RFx

How to access the RFx

There are basically three ways for you as a supplier to access an RFx Event:

1. via the **myTasks** section
2. via the **Sourcing** section
3. via **your Email Inbox**

It is up to you which way you choose.

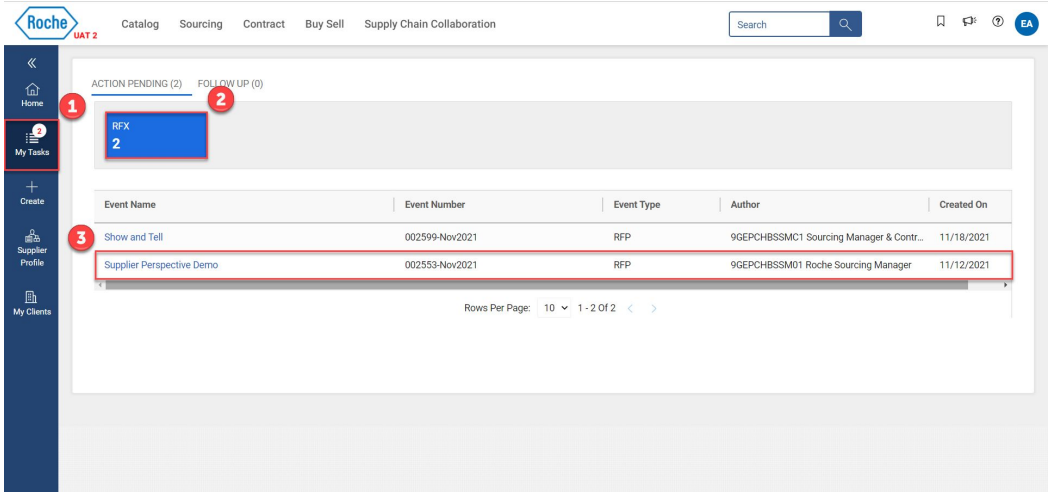
Option #1: Access RFx via myTasks section

How to access the RFx

Whenever there is a new invitation for an event from a Roche Sourcing Manager, that new event is displayed in your **My Tasks** section of Workspace with status New.

The Event disappears from My Tasks section as soon as you submit the responses; event completes or decline participation.

1. After the successful login, you will be directly in the **myTasks** section. There you will have an overview of all your pending tasks
2. To see the RFx, click on the **RFx button**
3. Please click on the event name to **access the RFx**



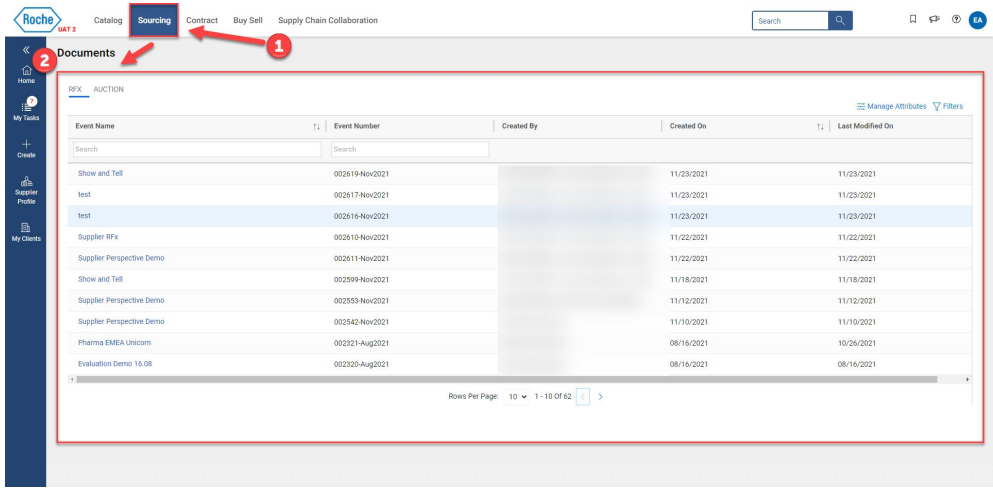
Option #2: Access RFx via Sourcing section

How to access the RFx

1. To access the RFx via the sourcing section, first click on the **Sourcing** tab in the upper left corner

2. Now you are able to see an overview of all current and past RFx events

3. Please click on the event name **to access the RFx**

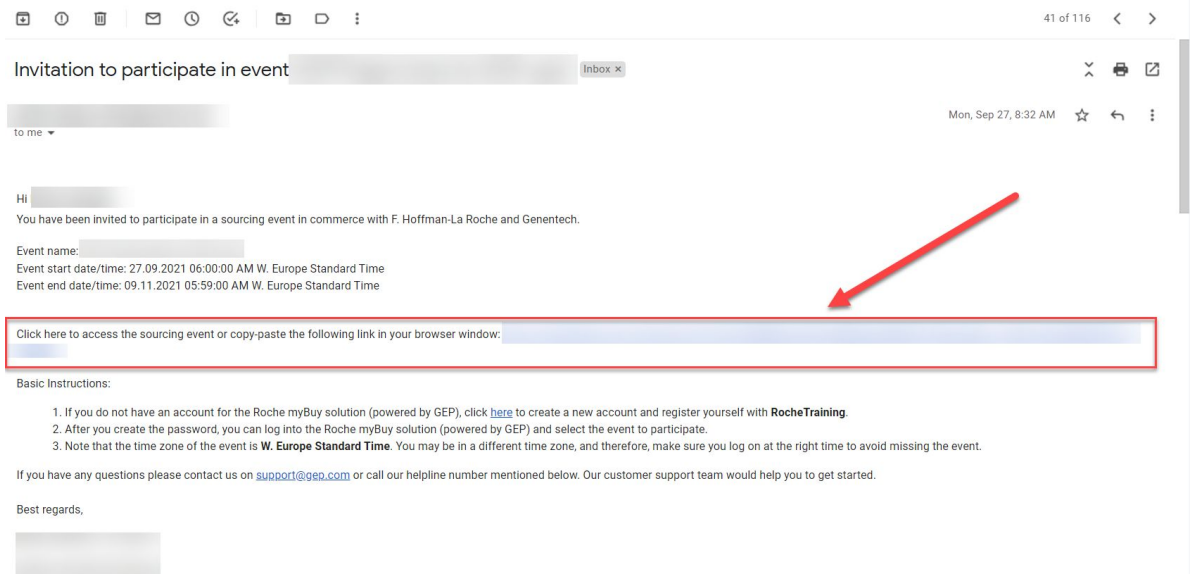


Option #3: Access RFx via your Email Inbox

How to access the RFx

1. Once the Roche Sourcing Manager has published the RFx Event and invited you to it, you will receive an **Invitation Email**

2. You can **access the RFx event by using the link** provided in the email (see screenshot right side)



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Invitation to participate in event [redacted] Inbox ×

[redacted]

to me

Mon, Sep 27, 8:32 AM

Hi [redacted]

You have been invited to participate in a sourcing event in commerce with F. Hoffman-La Roche and Genentech.

Event name: [redacted]

Event start date/time: 27.09.2021 06:00:00 AM W. Europe Standard Time

Event end date/time: 09.11.2021 05:59:00 AM W. Europe Standard Time

Click here to access the sourcing event or copy-paste the following link in your browser window: [redacted]

Basic Instructions:

1. If you do not have an account for the Roche myBuy solution (powered by GEP), click here to create a new account and register yourself with **RocheTraining**.
2. After you create the password, you can log into the Roche myBuy solution (powered by GEP) and select the event to participate.
3. Note that the time zone of the event is **W. Europe Standard Time**. You may be in a different time zone, and therefore, make sure you log on at the right time to avoid missing the event.

If you have any questions please contact us on support@gep.com or call our helpline number mentioned below. Our customer support team would help you to get started.

Best regards,

[redacted]

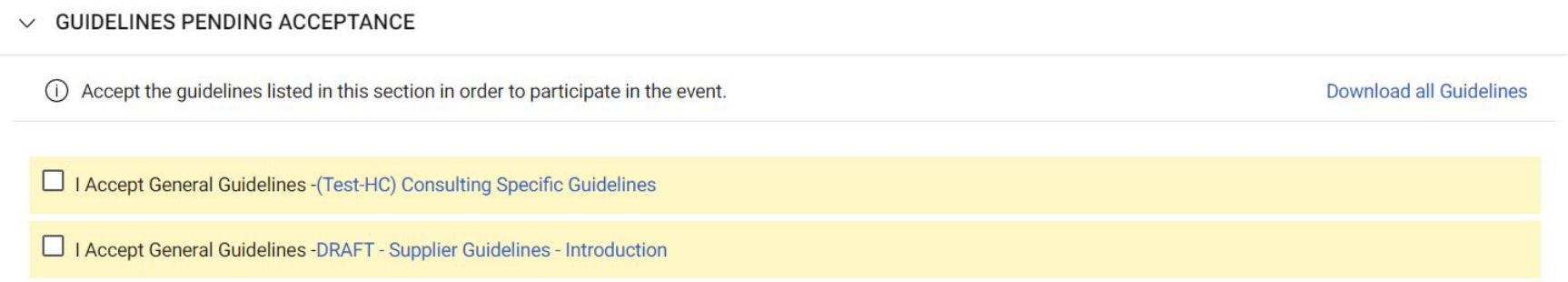
4. Guideline Acknowledgement

Guideline Acknowledgement

How to accept guidelines

On first access to the RFx page, you can see the **Guidelines Acceptance section** in the top *(this section is optional based on the configuration of the RFx, in most cases it will be there*). You are required to read the guidelines and other documents and accept them to gain access to the content sections in the RFx event (Remaining Guidelines, Questionnaires, Price Sheets, Attachments).

You are free to review the other sections (Basic Details, Event Timelines, Buyer Contact Information, Team Members) before accepting the guidelines.

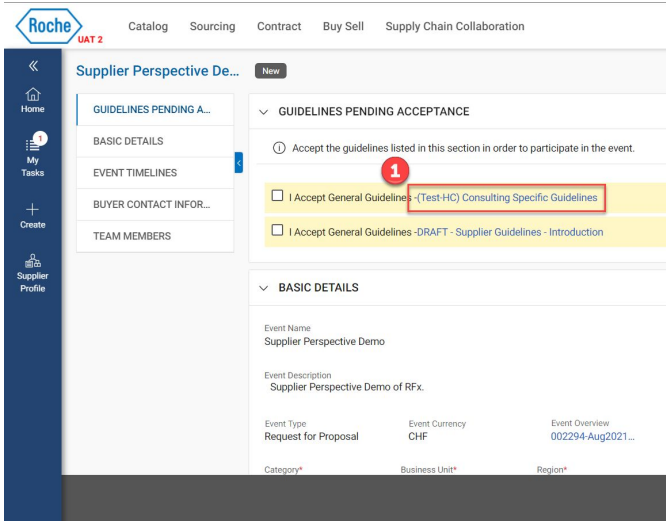


Guideline Acknowledgement

Review & Download Guidelines

Of course, you can **review & download** the **Roche Guidelines** before acknowledging:

1. Simply click on the **guideline name** (highlighted in blue)



Guideline Acknowledgement

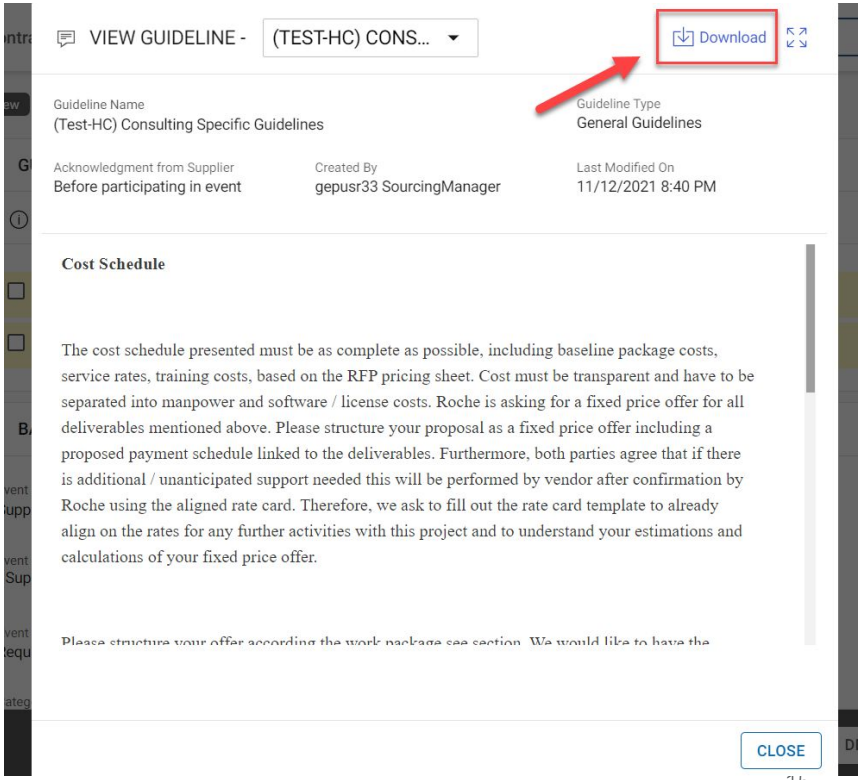
Review & Download Guidelines

Should you wish to **download the Guideline**, you can do so by clicking on the **Download** button.

The Guideline will then be downloaded to your computer as a MS Word document.

If the guidelines include attachments, your download will result in a zip file format.

The zip file will then contain the attachment(s) (in the respective format) and the guideline in MS Word format.

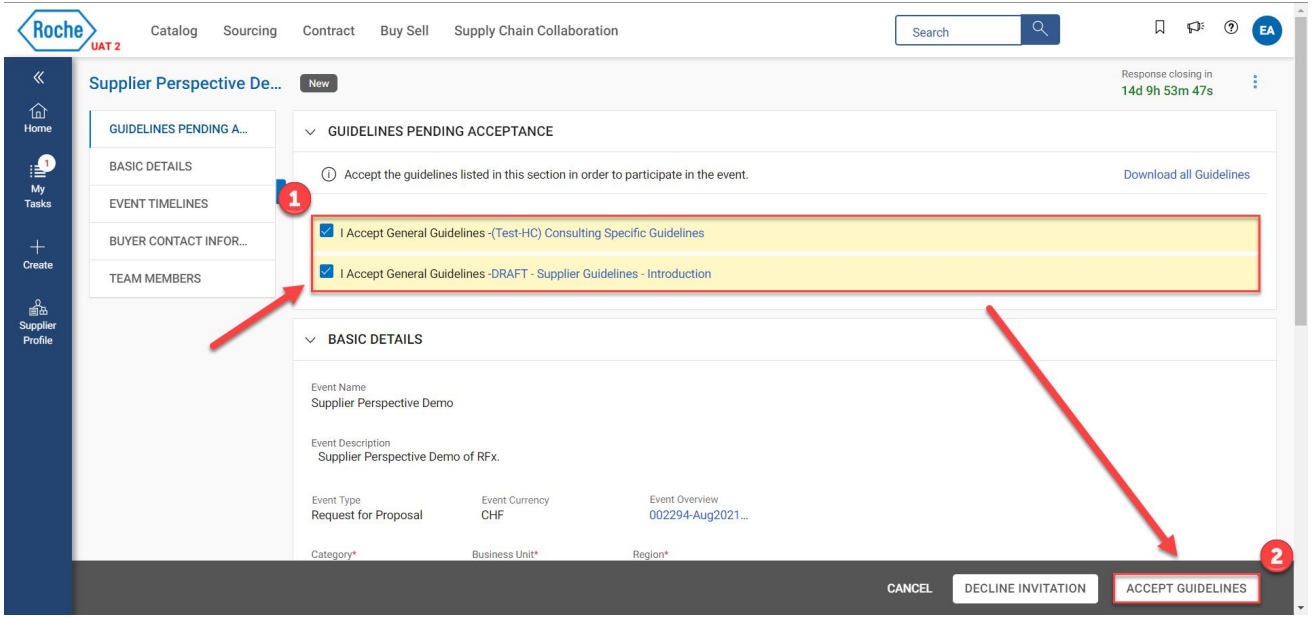


Guideline Acknowledgement

How to accept guidelines

1. Please accept all guidelines, by **clicking on the checkbox**

2. Afterwards please click on the **Accept Guidelines** button



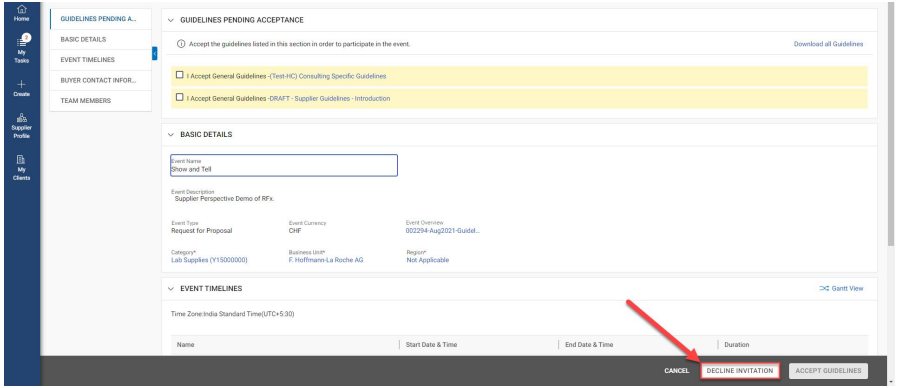
Guideline Acknowledgement

How to decline invitation

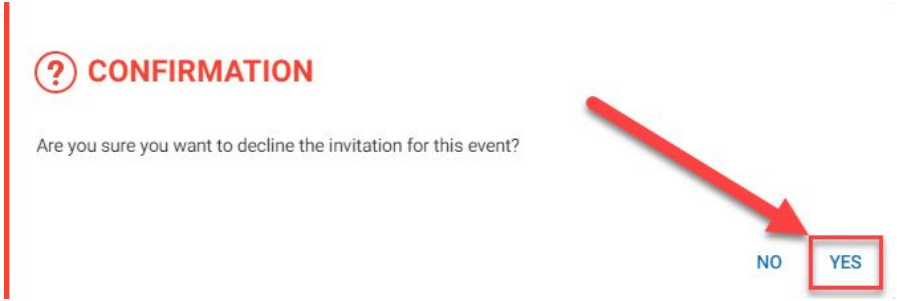
If you do not want to participate in the RFx event, you can **decline invitation**.

To decline invitation:

1. Click the **Decline Invitation** button



2. Click **Yes** on the following confirmation pop-up



Guideline Acknowledgement

How to decline invitation

3. Please select an appropriate reason from the drop-down
4. You can mention your comments in the respective comments field
5. Click the icon to upload any attachments
6. Click **Done**
7. Click **OK** on the following success pop-up

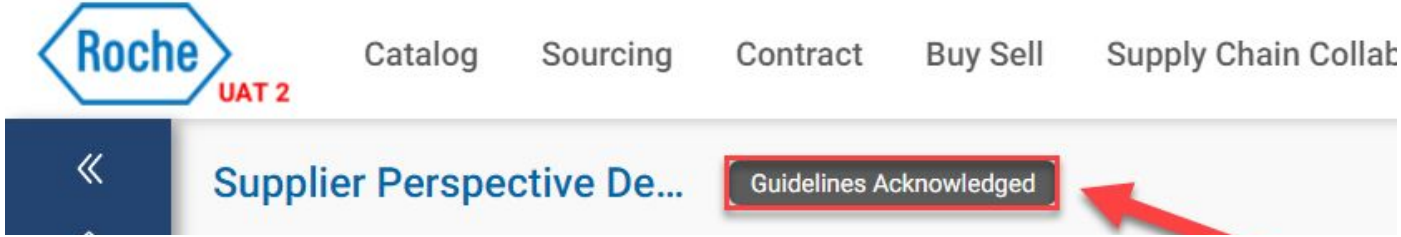
Important Information:

If you click on **Decline Invitation**, you will no longer be able to participate in the event, unless the responsible Roche Sourcing Manager invites you to the event a second time.

Guideline Acknowledgement

Important Information

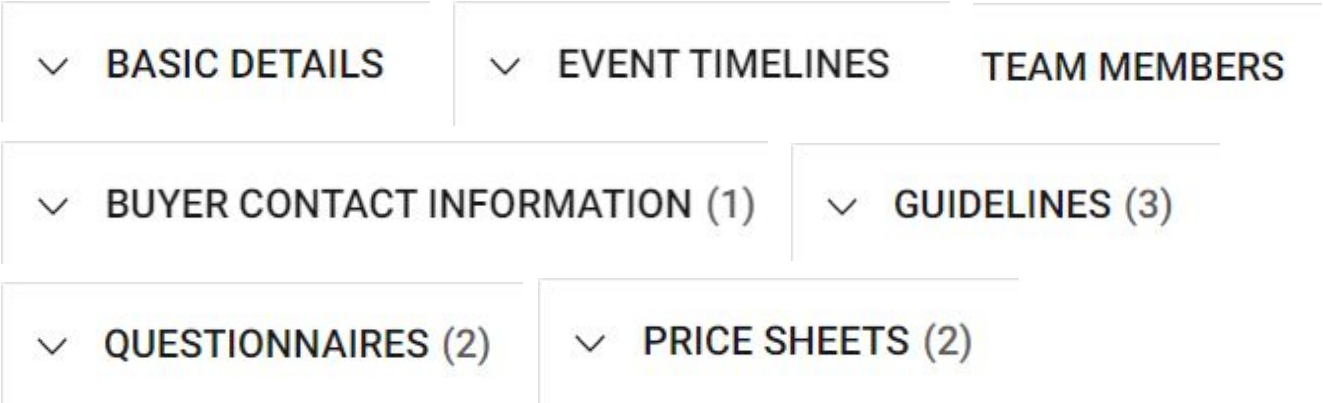
The status of your RFx will change to **Guidelines Acknowledged** after you accept the guidelines.



Important Information:

You now have access to all available RFx information (*Basic Details, Event Timelines, Buyer Contact Information, Team Members, Guidelines, Questionnaires, Price Sheets*).

However, you are not yet able to submit a response.



5. Confirm Participation

Confirm Participation

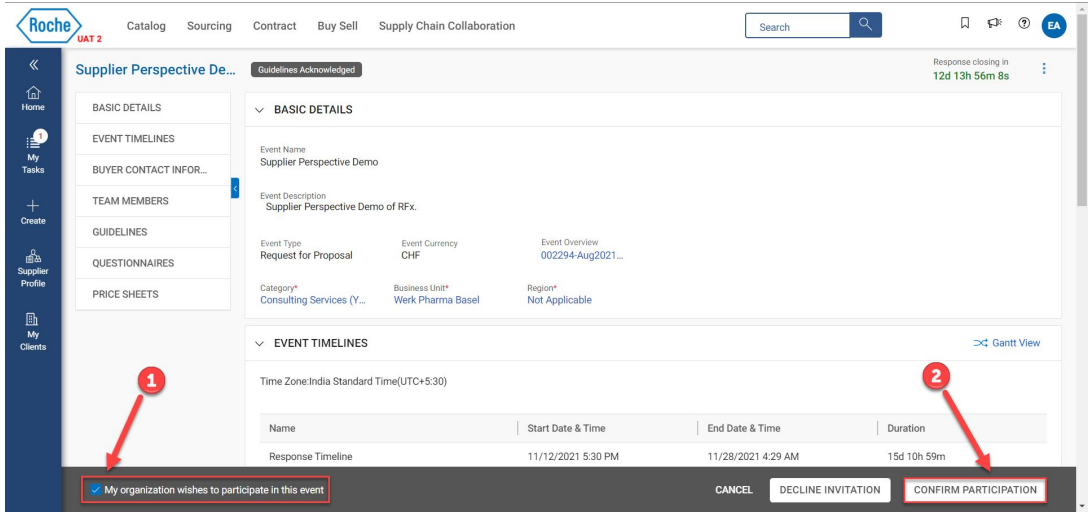
How to confirm participation

Now, in order for you to be able to provide your response to the RFx, you must first agree to the following statement:

"**My organization wishes to participate in this event**"

If you would like to participate in this event, please follow these steps:

1. Please click on the **checkbox** at the bottom left
2. Afterwards click on the button **Confirm Participation**

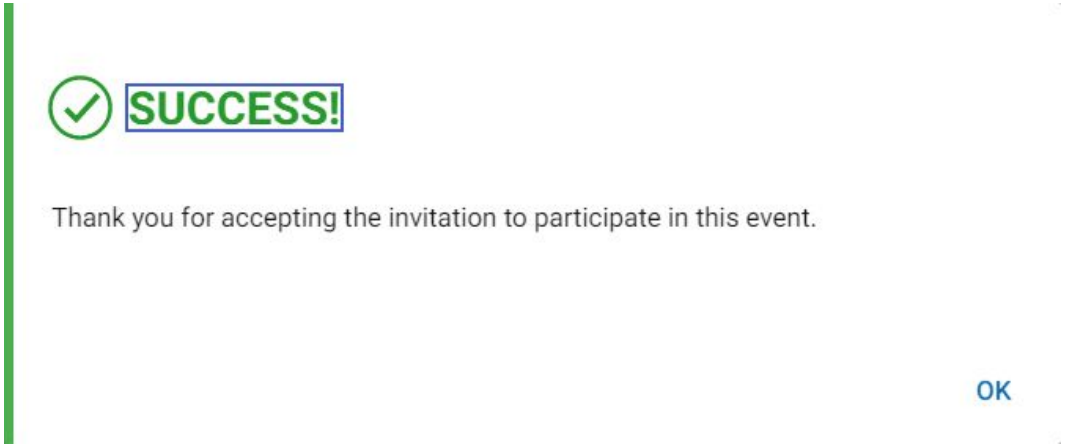


This action will also notify the responsible Roche Sourcing Manager that you are participating in the RFx event and will now prepare your response.

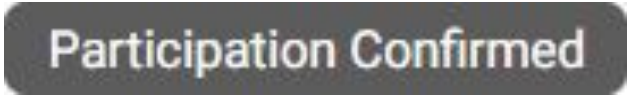
Confirm Participation

How to confirm participation

You will receive a **confirmation message** from the platform. This will confirm that your participation has been successfully registered.



In addition, the status of your RFx will change to **Participation Confirmed**.



6. RFx

6.1 Basic Details

Basic Details

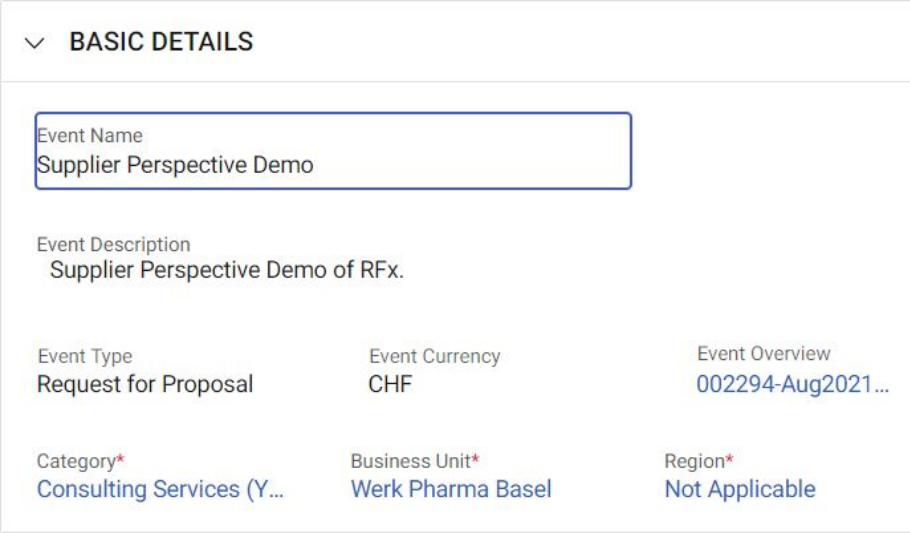
Basic Details Section

The **Basic Details** section displays the basic information regarding the RFx event such as the event name, event description, event type, event currency, event overview, category, business unit and region.

Important Information:

The **Event Currency** is defined by the responsible Roche Sourcing Manager. You cannot change it yourself.

The **Region field** is always not applicable due to system configuration.



6.2 Event Timeline

Event Timeline

Introduction

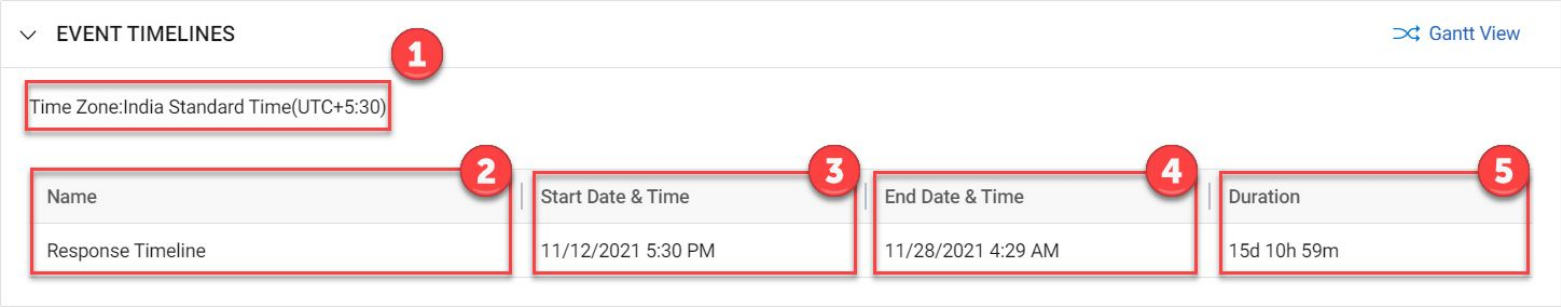
The **Event Timeline** section displays the response timeline set by the responsible Roche Sourcing Manager.

The **Response Timeline** is the time frame within which you can respond to the RFx.

Event Timeline

Overview

1. You can see your **Time Zone** defined in the myBuy platform
   - If necessary, you can set it correctly in your supplier profile
2. Here you can see the **Name of the Timeline**
3. This is where you can see when the **Response Timeline will start**
4. This field will show you the **End date + Time of the Response Timeline**
5. The **Duration** indicates the **Response Time Frame** within which responses can be submitted



Event Timeline

Important information

Important Information:

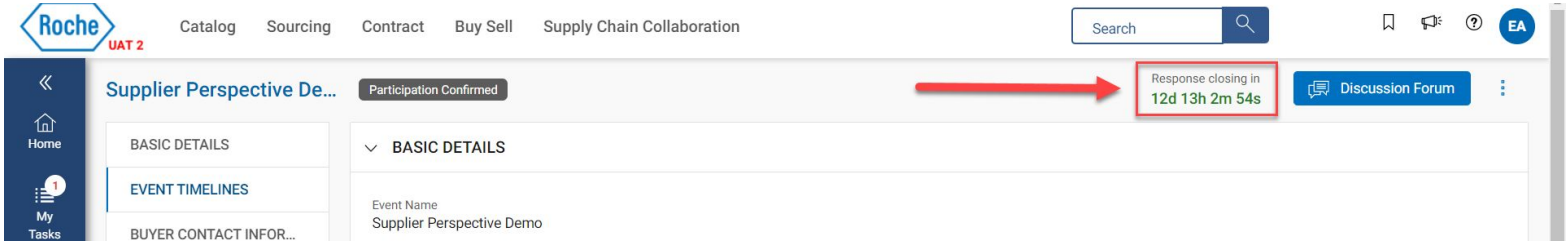
Normally the **Response Timeline** starts at the same time as the **Publication Date of the RFx**.

However, it is technically possible to publish the event when the response timeline only starts some time later.

Note:

Only when the **Response Timeline** is opened, you as a supplier can submit your response to the RFx.

On the RFx page, the **Timer Section**, in the upper right corner, depicts detailed information about event opening or closing, in days and time.



Event Timeline

Important information

Important to know:

If the responsible Roche Sourcing Manager has set multiple timelines, you will see them also in this section.

Any other timeline besides the **Response Timeline** is only an "informal timeline" - nevertheless it is recommended by Roche to follow these timelines as well.

Only the **Response Timeline is essential for you as a supplier** and triggers a technical blocking/unblocking of responses.

6.3 Buyer Contact Information

Buyer Contact Information

Important information

In this section you can see **all relevant Roche Contacts**.

BUYER CONTACT INFORMATION (1)

Name	Designation	Email Address	Contact Number
Sourcing Manager & Contracting			

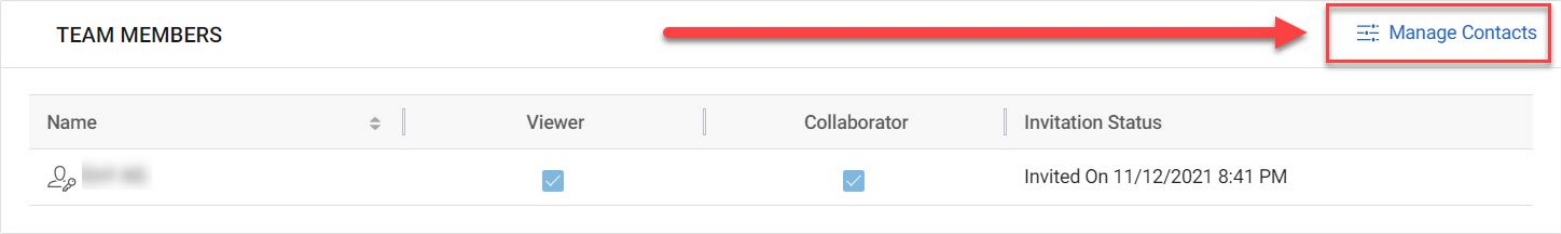
6.4 Team Member

Team Member

How to manage Team Member Contact Information

The **Team Members** section displays the representatives of your company that were invited to participate in the RFx by Roche Sourcing Manager.

Using **Manage Contacts** button you are able to add/remove or assign your company representatives, that should participate in the event.



Team Member

How to manage Team Member Contact Information

In this section you can **manage the contacts within your company**.

Manage Contacts - [redacted]

Search | Add New Contact

Name & Contact	User's Role	Updated By	Email Sent On
[redacted] AG [redacted]	Primary Responder	Buyer	11/18/2021 9:18 PM
Adrienn M [redacted]	No Access		
Dummy Contact [redacted]	No Access		
Sebastian W [redacted]	No Access		

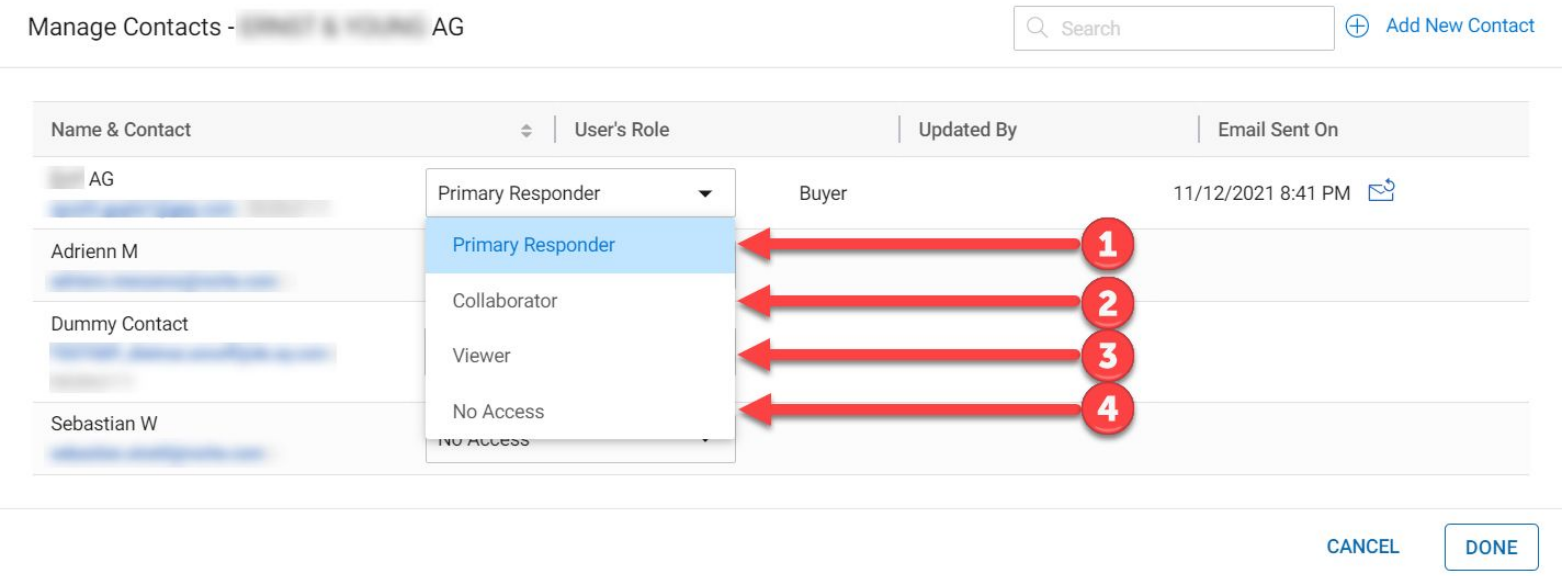
CANCEL | DONE

Team Member

How to manage Team Member Contact Information

You can now view all current existing contacts that have already been defined for your company in myBuy.

In addition, you can decide which contact should be assigned to which role/rights for this specific RFx.



Team Member

How to manage Team Member Contact Information

You can assign the following roles:

1. **Primary Responder**

   The primary point of contact from Supplier Organization, ideally means the entire RFx response will be driven by this person. There can be only one Primary Responder.

2. **Collaborator**

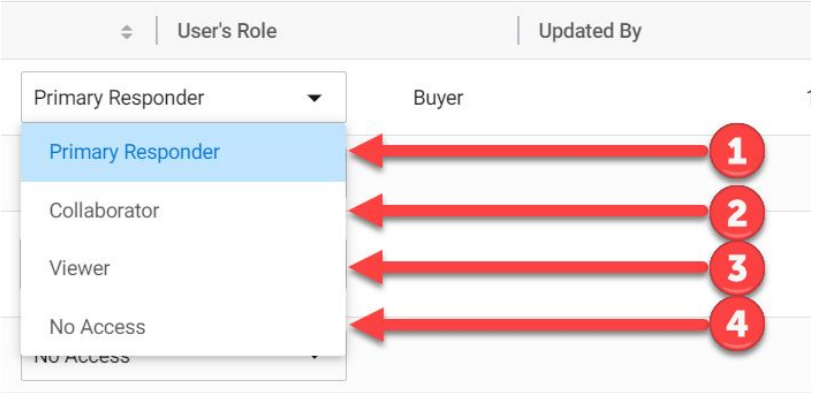
   Team member having rights equivalent to Primary Responder. There can be multiple collaborators involved in an RFx event.

3. **Viewer**

   Team member having only view access to event.

4. **No Access**

   This contact person won't be able to access the event at all.

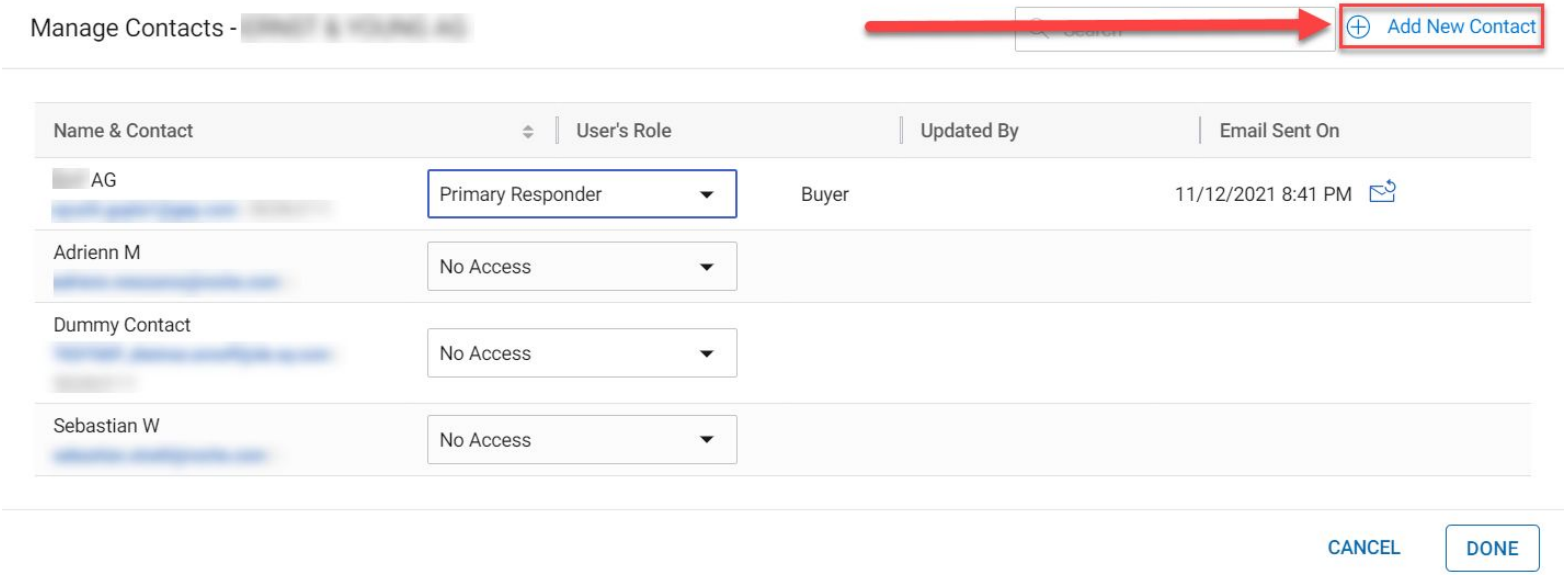


Team Member

How to manage Team Member Contact Information

You also have the **possibility to add completely new contacts**.

To do this, please click the **Add New Contact** button first:



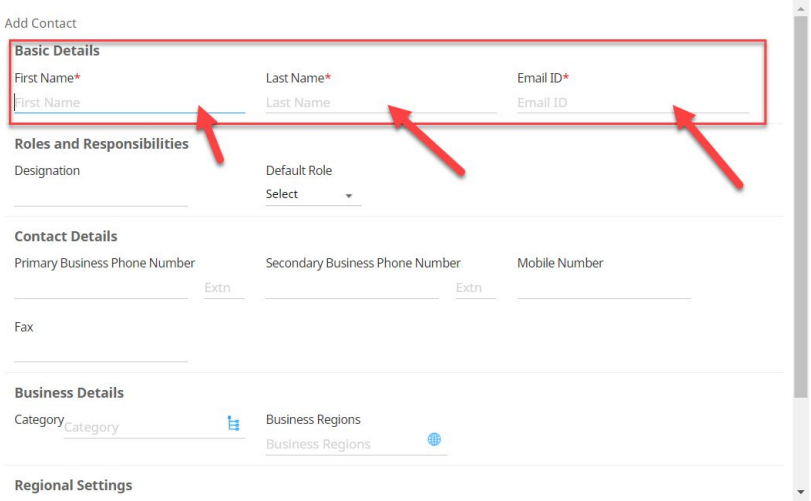
Team Member

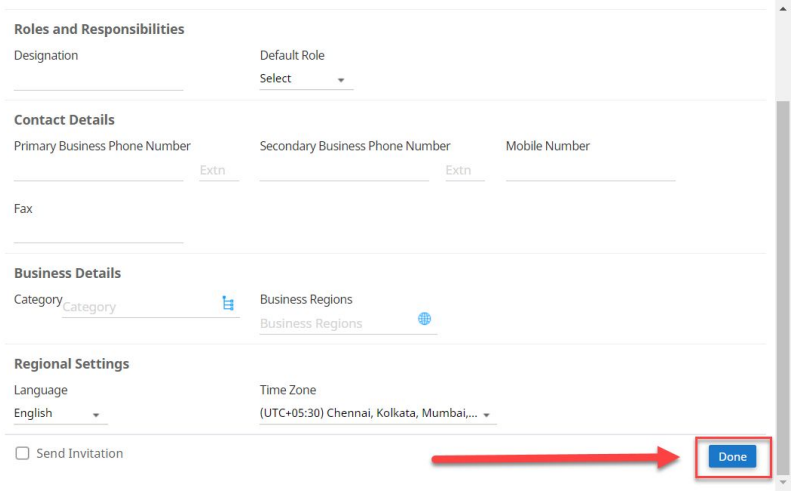
How to manage Team Member Contact Information

Please fill in all mandatory fields with the information about your new contact (marked with a red asterisk*).

Once you are done, click the **Done** button at the bottom right.

Important information: Adding a new contact does not require approval from Roche Sourcing Management.





6.5 Guidelines

Guidelines

Important information

The Guidelines section includes the guidelines provided by the Roche Sourcing Manager that you need to follow while responding to an RFx. You can **access & download all guidelines**.

As you can see in the picture below, some of the guidelines don't require upfront acknowledgement and can be only seen when you have full access to contents of the event - e.g. second guideline in the picture.

GUIDELINES (3)

Download

	Guideline Name	Guideline Type	Accepted By	Accepted On
	(Test-HC) Consulting Specific Guide...	General Guidelines	[illegible]	11/15/2021 2:02 PM
	Consulting Services Guidelines	General Guidelines	-	-
	DRAFT - Supplier Guidelines - Introd...	General Guidelines	[illegible]	11/15/2021 2:02 PM

6.6 Questionnaires

Questionnaires

Important information

You are now in the **Questionnaires** section.

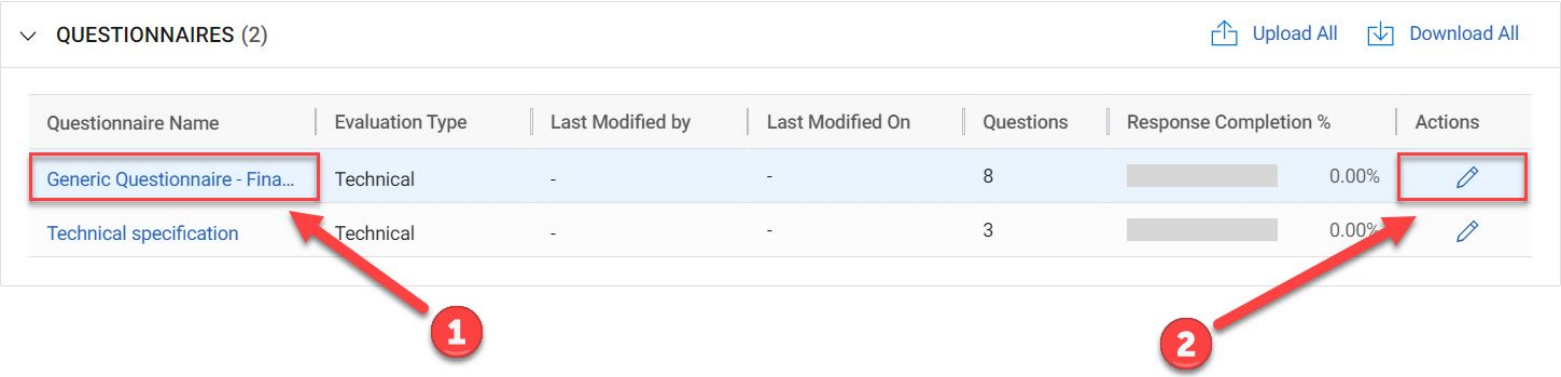
The Questionnaires section enables you to answer questions added by the Roche Sourcing Manager.

Your response to the questions may determine your score when the RFx is evaluated.

How many questionnaires are available here depends on the RFx event and can therefore vary.

To answer a questionnaire, you can either

1. click on the name
2. or on the small pencil on the right side



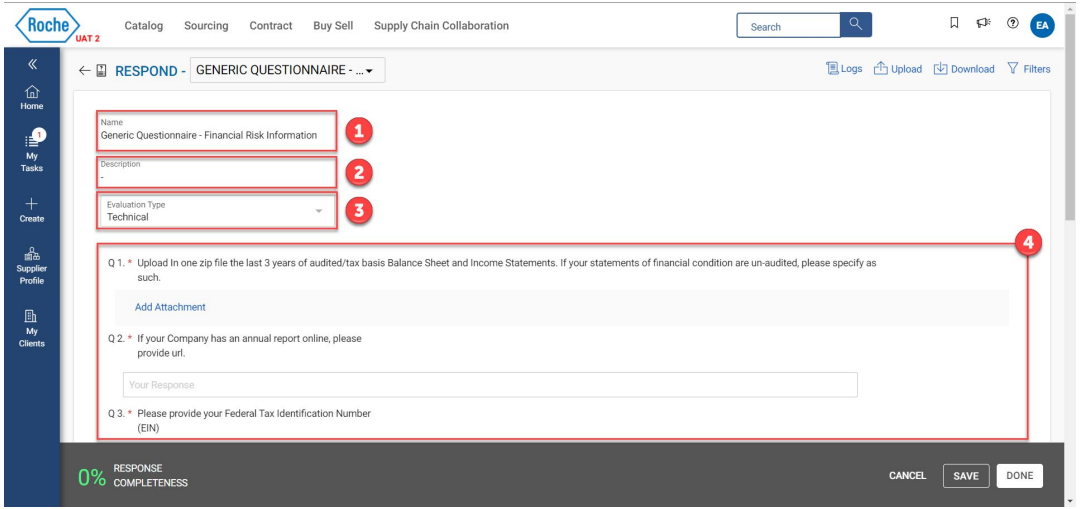
Questionnaires

Overview

You are now in the **Questionnaire**.

You should see the following areas:

1. **Name**: The name of the questionnaire
2. **Description**: The description of the questionnaire (if provided)
3. **Evaluation Type**: Informative (defines who on Roche side will provide scoring)
4. The **actual Questionnaire part** with all questions



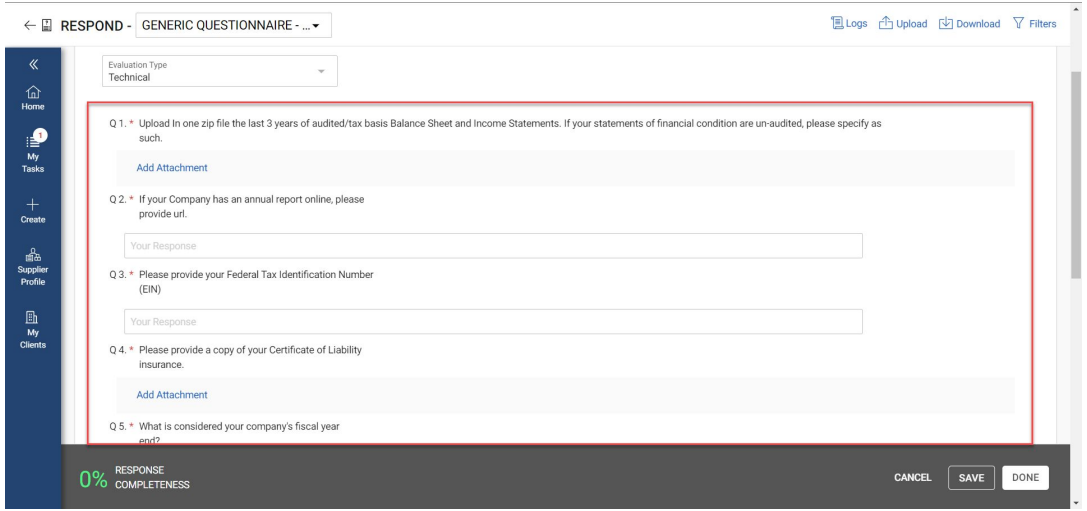
Questionnaires

Important information

Basically, there are different types of questions that require different types & ways of answers from you.

The following are the most common types:

1. Attachment Only Question
2. Text Response Question
3. Text + Attachment Question
4. Drop Down Question
5. Checkbox Question
6. Date/Time Question



Important Information:

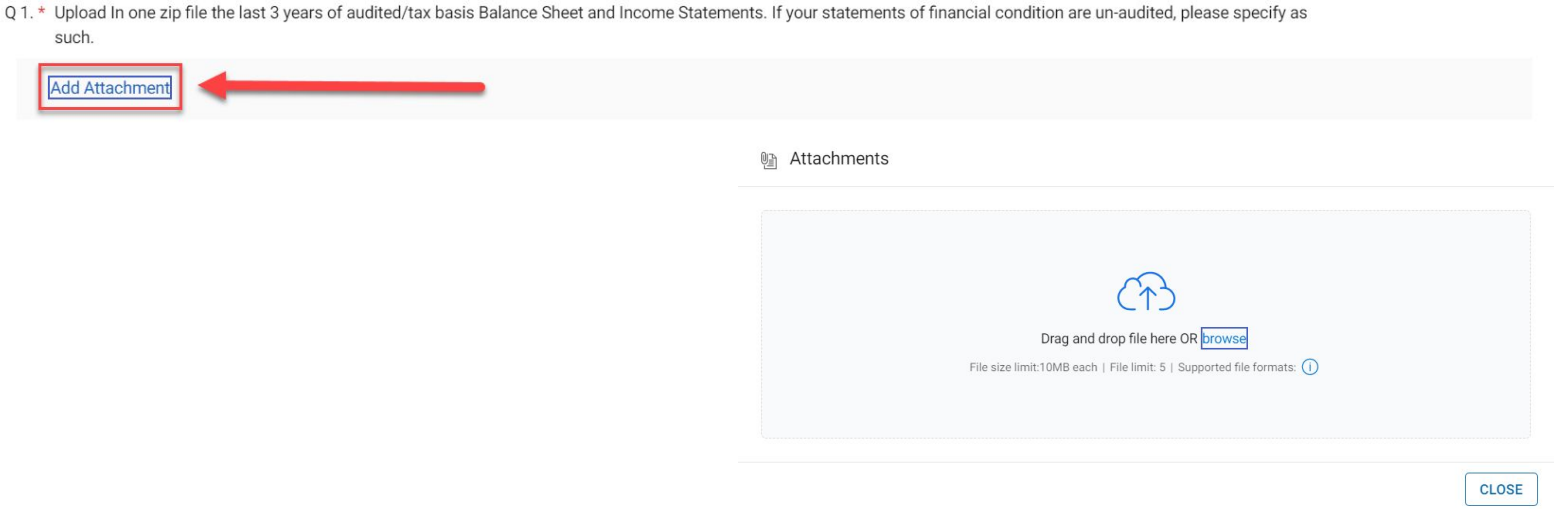
Each question marked with a **red asterisk*** is **mandatory**.

myBuy will not accept any answer until all mandatory fields are answered.

Questionnaires

Attachment Only Question

You can **upload one or more attachments** in response to an **Attachment Question** by clicking on the **Add Attachment** button.



Questionnaires

Text Response Question

You may also be asked to answer in text form.

There are basically **3 different types of text answer questions**:

- **Free Form - Single line Text:**

  You can provide a one-line response.

  The text response is limited to 100 characters.
- **Free Form - Multiple line Text:**

  You can provide a response which exceeds one line.

  The text response is limited to 4000 characters.
- **Free Form - Rich Text:**

  You are able to provide a response with enriched text capabilities (formatting options) and no limit to the characters.

Q 2. * If your Company has an annual report online, please provide url.

Your Response

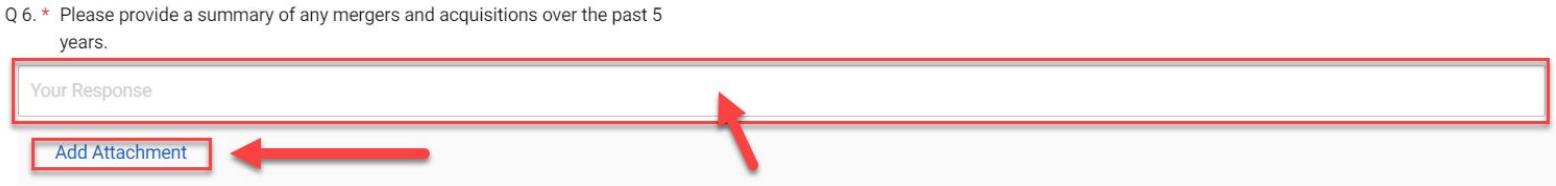
0/100

Questionnaires

Text + Attachment Question

You can also be asked for a **combination between Text Answer + Attachment**.

However, in this constellation the **attachment is optional** and therefore not mandatory.



Questionnaires

Drop Down Question

You may also be asked to select your answer from a **Drop Down List**.

Q 8. * For this scope of services, payment terms are 60 days. Will you agree to comply to these payment terms for this scope of services?

Please Select

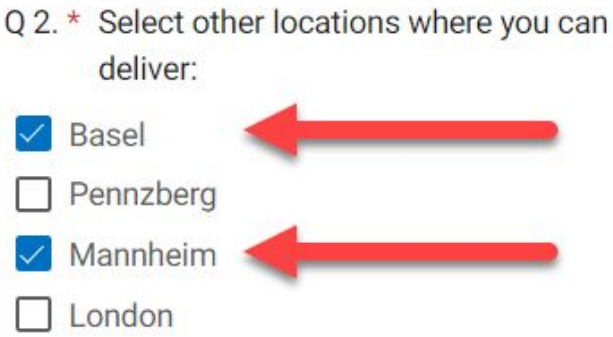
- Yes
- No

Questionnaires

Checkbox Question

You may be asked to answer the question by **selecting checkboxes**.

Checkbox Questions allow you to **select multiple answers** for a question from the list of available options.



Questionnaires

Date/Time Question

You may be asked to provide a **date and time** by selecting it from a calendar pop-up.

Questionnaires

Overview about all possible question types

The question types you saw in the previous slides are the most commonly used.

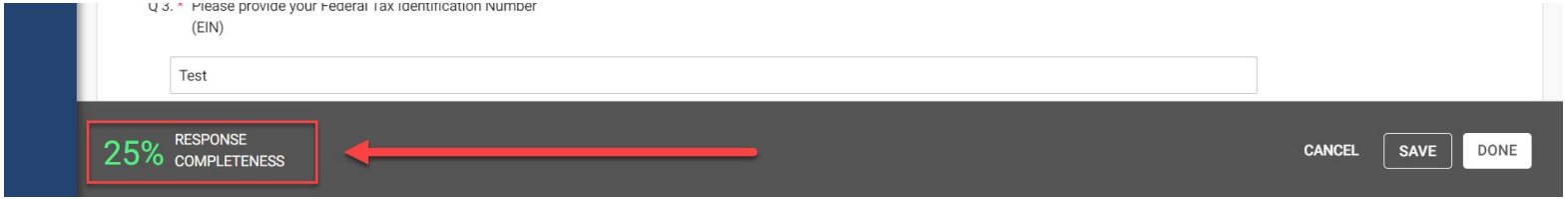
However, below you will find a table with all the other question types you could potentially see in a questionnaire:

Matrix of Text Fields	You will be asked to type your answer into each cell from a table with multiple rows and columns.
Matrix of Radio Buttons	From a table with multiple rows and columns, you will be asked to select your preferred answer by selecting the appropriate radio button.
Matrix of Checkboxes	You will be asked to select your desired answer from a table with several rows and columns by selecting the matching check boxes.
Matrix of Drop Down	You will be asked to select your desired answer from a drop down list in a table with several rows and columns.
Combination Matrix	You will be provided with a table with multiple rows and columns. The rows contain the criteria for which you need to provide your answer. The columns contain a combination of response options such as text boxes, radio buttons, check boxes and drop down lists.
Table Type	You will be provided with a table with columns containing a combination of different response options such as text boxes, radio buttons, check boxes and drop down lists. In this response type you will have the possibility to add additional rows if necessary.

Questionnaires

Completion of Questionnaire

The **Completion Indicator** on the bottom left corner of the page indicates the completion status of your response in percentage (%):



Important Information:

- **You may not reach the 100% progress**, as the Completion Indicator takes the average progress of the mandatory as well as of the non-mandatory questions

Questionnaires

Save & Cancel Questionnaire

Important Information:

1. Click on the **SAVE** button at the bottom right to save your current progress within the Questionnaire. You will remain in this window after saving and you can continue working on the Questionnaire
2. If you click on the **CANCEL** button, all unsaved progress within the Questionnaire will be deleted
3. If you click on the **DONE** button, your current progress will also be saved, but you will be redirected back to the main page of the RFx

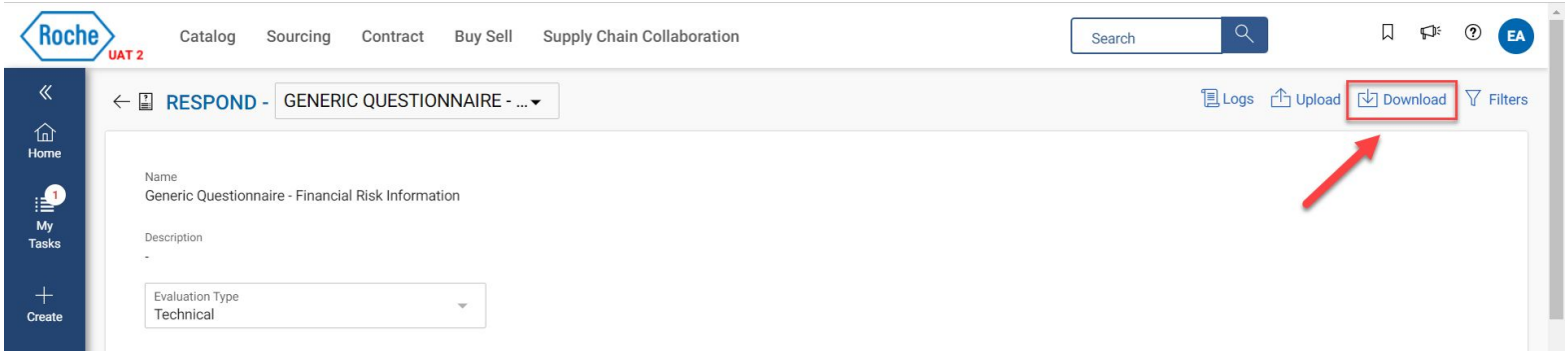
Questionnaires

Not recommended: Responding to a Questionnaire Offline

You also have the option of **downloading the questionnaire in MS Excel format**.

From the Questionnaire section, open the desired questionnaire in edit mode.

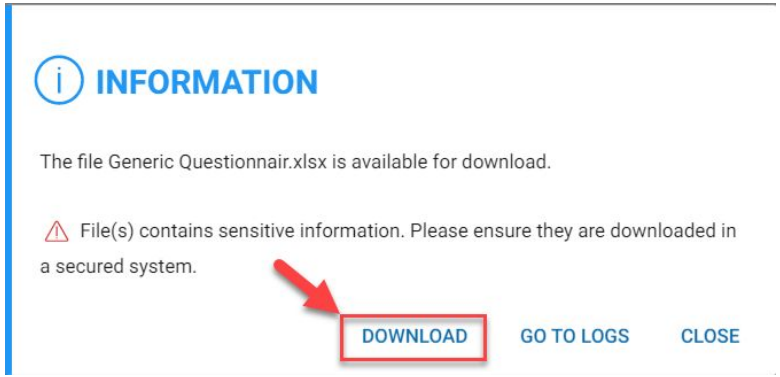
Click the **Download** icon on the top-right corner of the questionnaire.



Questionnaires

Not recommended: Responding to a Questionnaire Offline

Before the Questionnaire will be downloaded to your computer in MS Excel format, you need to confirm the download by clicking on the **Download** button.



Questionnaires

Not recommended: Responding to a Questionnaire Offline

Important Information:

1. **Text + Drop Down Questions** can be answered by you in an MS Excel
2. **Questions that require attachments** as an answer cannot be answered in the MS Excel spreadsheet and must therefore be answered directly in the myBuy platform

Questionnaire Description:				
SECTION NAME	QUESTION NUMBER	QUESTION TITLE	RESPONSE OPTIONS	RESPONSE TO QUESTION
-	1	* Upload In one zip file the last 3 years of audited/tax basis Balance Sheet and Income Statements. If your statements of financial condition are un-audited, please specify as such.		This question type is not supported on the Excel file. Suppliers must provide response on application.
-	2	* If your Company has an annual report online, please provide url.	-	Test
-	3	* Please provide your Federal Tax Identification Number (EIN)	-	Test
-	4	* Please provide a copy of your Certificate of Liability insurance.		This question type is not supported on the Excel file. Suppliers must provide response on application.
-	5	* What is considered your company's fiscal year end?	-	
-	6	* Please provide a summary of any mergers and acquisitions over the past 5 years.	-	
-	7	* Research and Development spend in % of sales	-	
-	8	* For this scope of services, payment terms are 60 days. Will you agree to comply to these payment terms for this scope of services?	-	

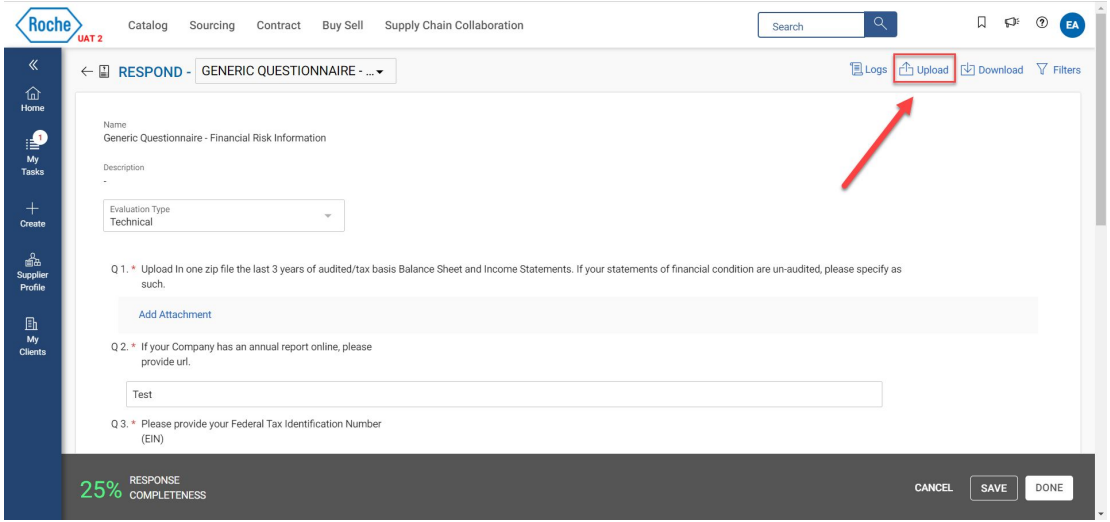
Instructions | 1.Generic Questionnaire - Finan

Questionnaires

Not recommended: Responding to a Questionnaire Offline

After you have provided all the answers in the MS Excel, save it.

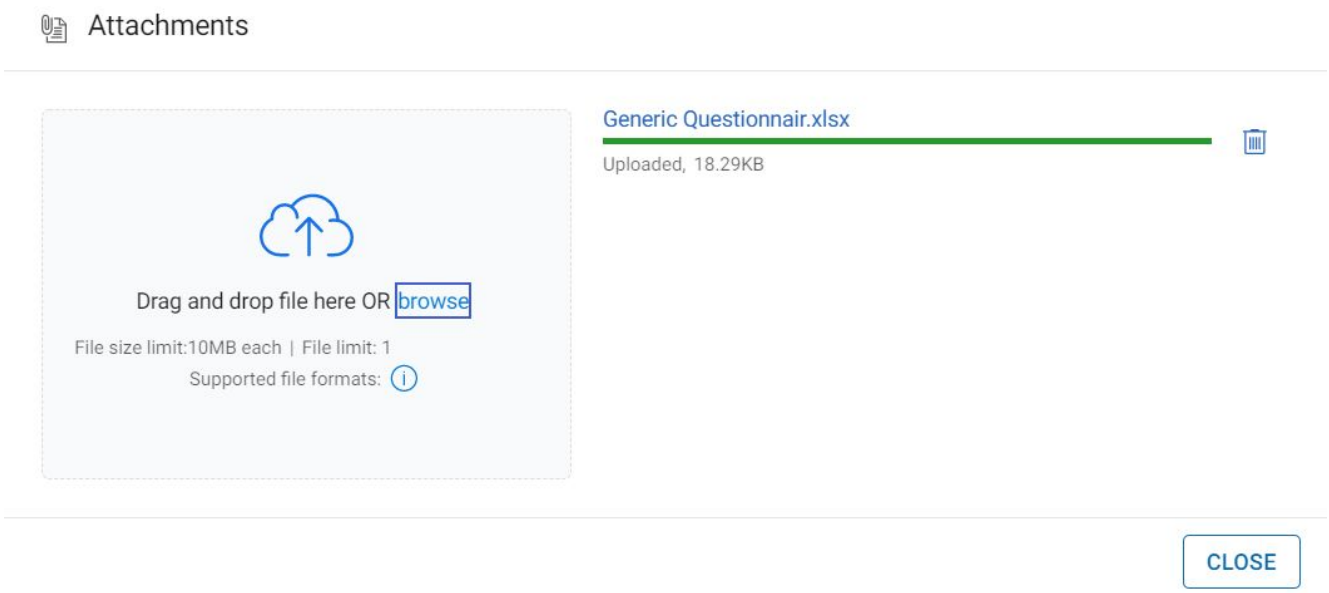
By clicking on the **Upload** button, you can upload your MS Excel file back to the myBuy platform.



Questionnaires

Not recommended: Responding to a Questionnaire Offline

You can upload your MS Excel file to the myBuy platform either by **Drag and Drop** or via the **Browse Function**.



Questionnaires

Not recommended: Responding to a Questionnaire Offline

You will be informed by the platform as soon as the upload of your Questionnaire MS Excel file has been successfully completed.

Questionnaire import is in progress

Important Information:

You need to refresh the page once, to view the response in myBuy.

6.7 Price Sheets

Price Sheets

Important information

You are now in the Price Sheets section.

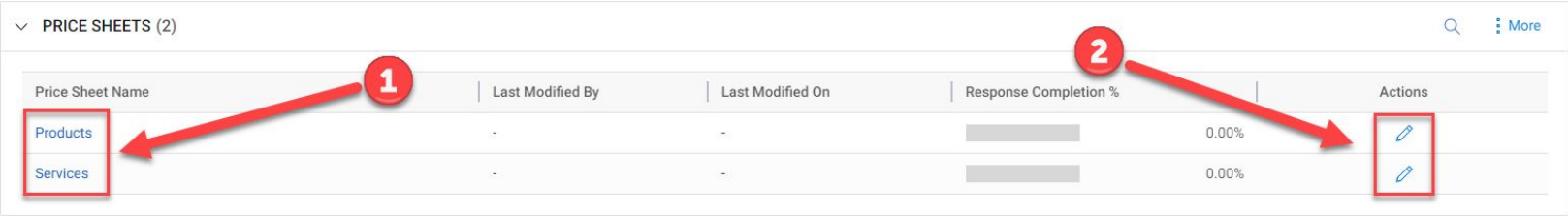
A price sheet includes a list of items specified by the Roche Sourcing Manager.

As a supplier, you can provide a quotation for the required items.

How many price sheets are available here depends on the RFx event and can therefore vary.

To answer a price sheet, you can either

1. click on the name
2. or on the small pencil on the right side



Price Sheets

Important information

You are now in the previously selected price sheet.

The columns and rows in the price sheet are non-editable.

1. By default, the intent to Bid field for each line item is set to Yes. This means you want to bid for the line item.

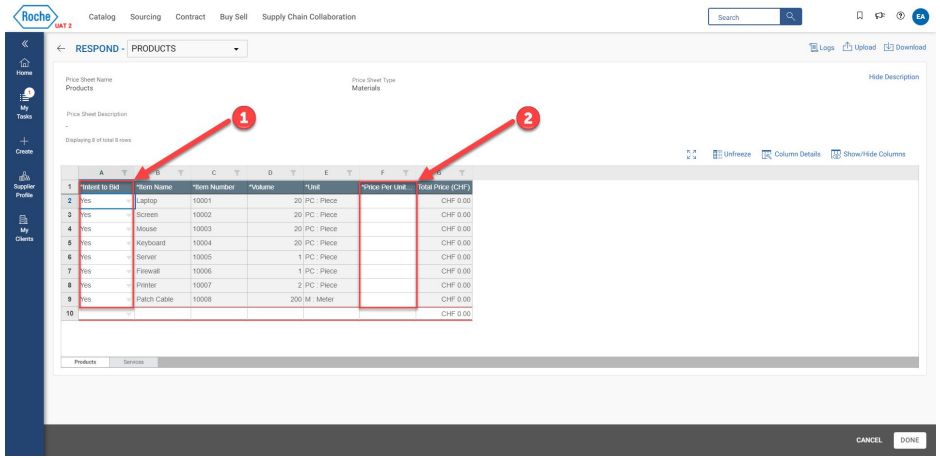
   Basically, you will have two options that you can select per line:

   - **Yes**: You want to provide an offer for this line item
   - **No**: You do not want to provide an offer for this line item

2. Each column that has a white background has to be filled in by you with specific information (*in this example, you would have to indicate the price per unit for the different line items*).

   If the column title has an **asterisk***, this means this is a **mandatory column** for you to fill in.

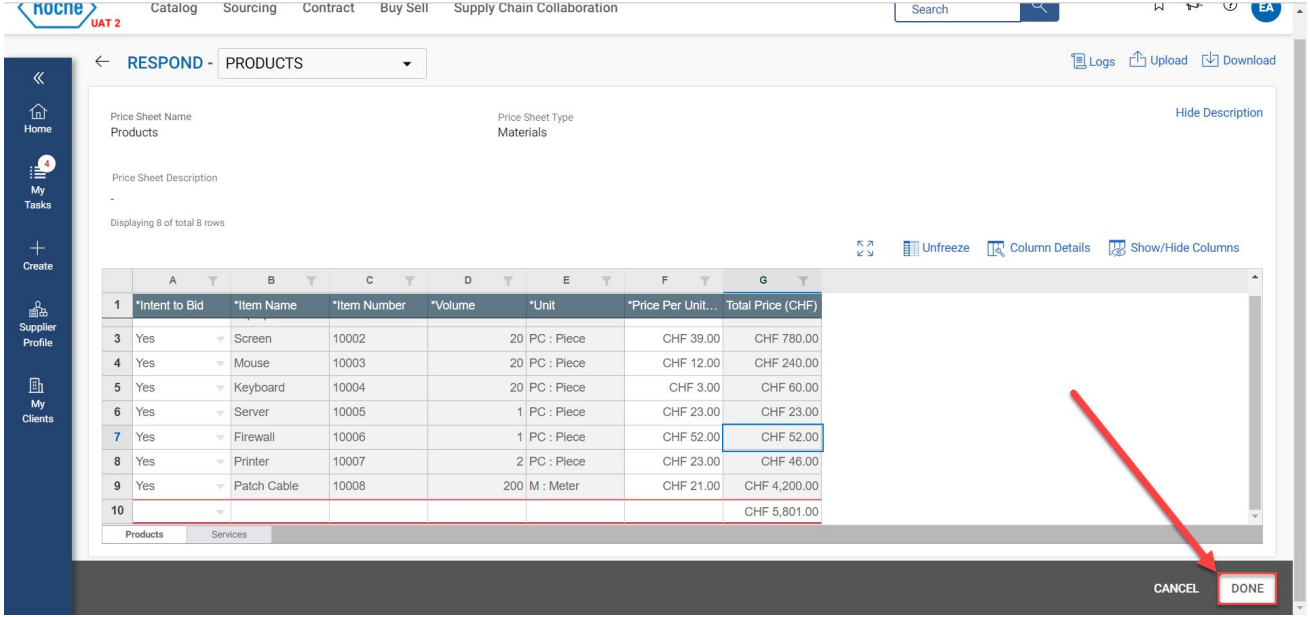
   If the column title does not have an asterisk*, this is an optional column.



Price Sheets

Save Price Sheet

Once you have completed the Price Sheet, simply click on the **Done** button at the bottom right to **submit the Price Sheet**.

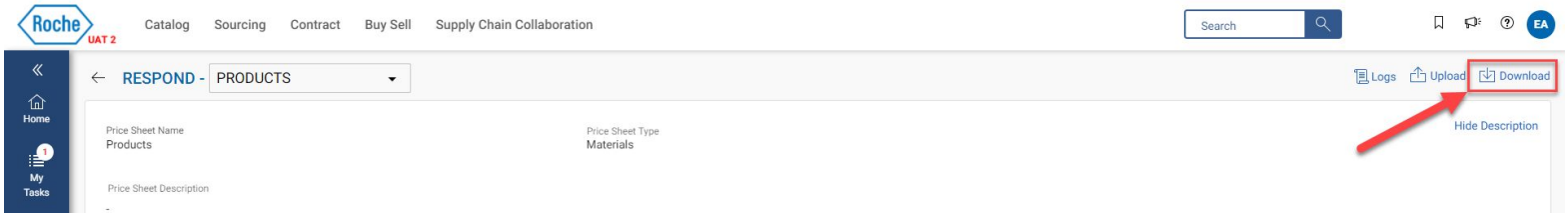


Price Sheets

Not recommended: Downloading a Price Sheet

You also have the option of downloading the price sheet in MS Excel format:

1. In the Price sheet section, open the required Price sheet in Edit mode
2. Click the **Download** icon on the top-right corner of the Price sheet



Price Sheets

Not recommended: Downloading a Price Sheet

Before the Price Sheet will be downloaded to your computer in MS Excel format, you need to confirm the download by clicking on the **Download** button.

Price Sheets

Not recommended: Downloading a Price Sheet

You cannot add, edit or delete columns and rows in the downloaded MS Excel Price Sheet.

The first tab of the MS Excel Price Sheet contains a detailed instruction on how to fill in this Price Sheet.

002553-Nov2021 - Supplier Perspective Demo

Price Sheet Name:	Products
Price Sheet Type:	Materials
Description:	

Column Type :	Drop Down	Text	Text	Numeric	Drop Down	Currency	Computed
Column Name:	*Intent to Bi	*Item name	*Item number	*Volume	*Unit	*Price per unit(CHF)	Total price(CHF
	Yes	Laptop	10001	20	PC : Piece		CHF 0.00
	Yes	Screen	10002	20	PC : Piece		CHF 0.00
	Yes	Mouse	10003	20	PC : Piece		CHF 0.00
	Yes	Keyboard	10004	20	PC : Piece		CHF 0.00
	Yes	Server	10005	1	PC : Piece		CHF 0.00
	Yes	Firewall	10006	1	PC : Piece		CHF 0.00
	Yes	Printer	10007	2	PC : Piece		CHF 0.00
	Yes	Patch Cable	10008	200	M : Meter		CHF 0.00

INSTRUCTIONS

Updating a Price Sheet

Enter your bids for each line item in the cells.

Select "No" in the "Intent to Bid" column, if you do not wish to bid for a particular item.

Note

Ensure that the column data is as per the defined column type.

Data in the uploaded file will overwrite any existing data on the application.

LEGEND

Editable column. You may add data for these columns.

Read-only column. Values in this column will not be considered when importing the price sheet.

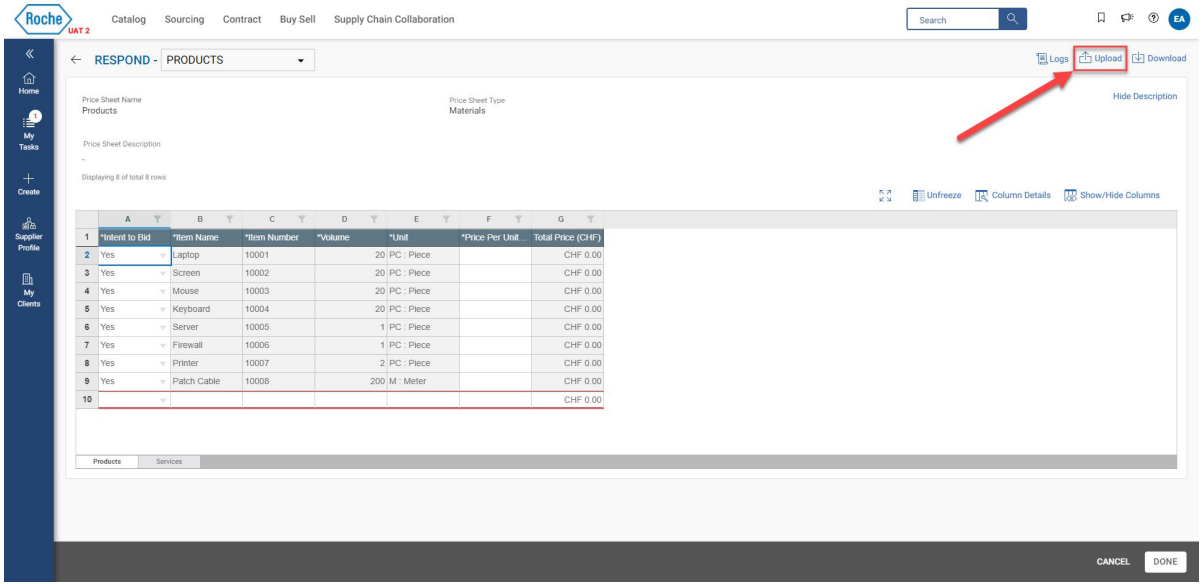
Computation column. Values in this column will not be considered when importing the price sheet.

* Mandatory column. Data must be added for these columns.

Price Sheets

Not recommended: Downloading a Price Sheet

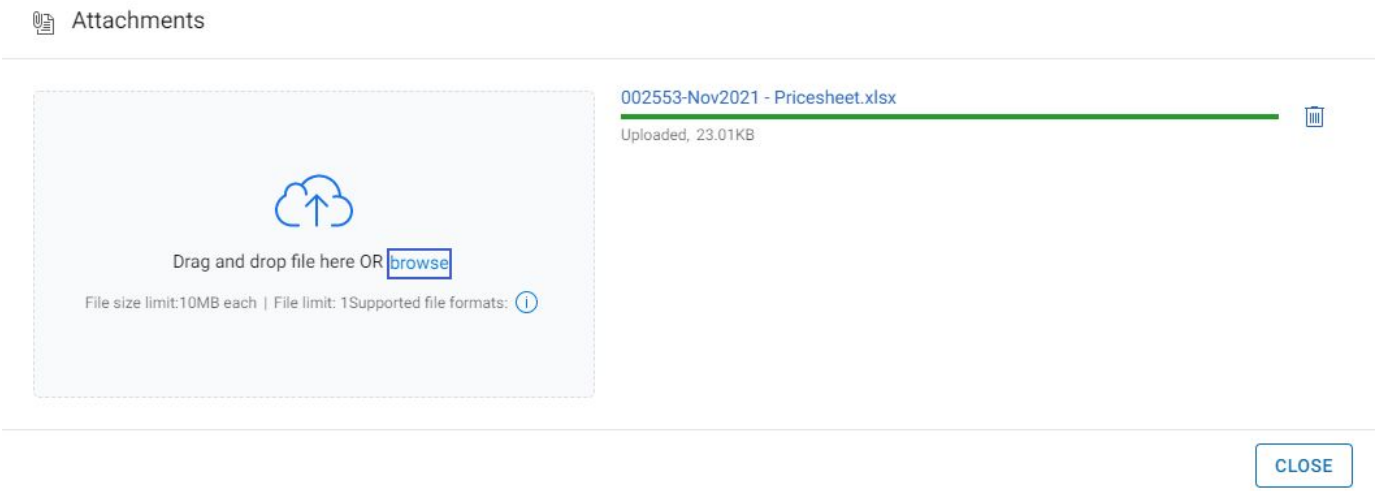
Once you have responded to the Price Sheet in the MS Excel, click the **Upload** icon on the top-right corner to upload your response.



Price Sheets

Not recommended: Downloading a Price Sheet

You can upload your Excel file to the myBuy platform either by **Drag and Drop** or via the **Browse Function**.

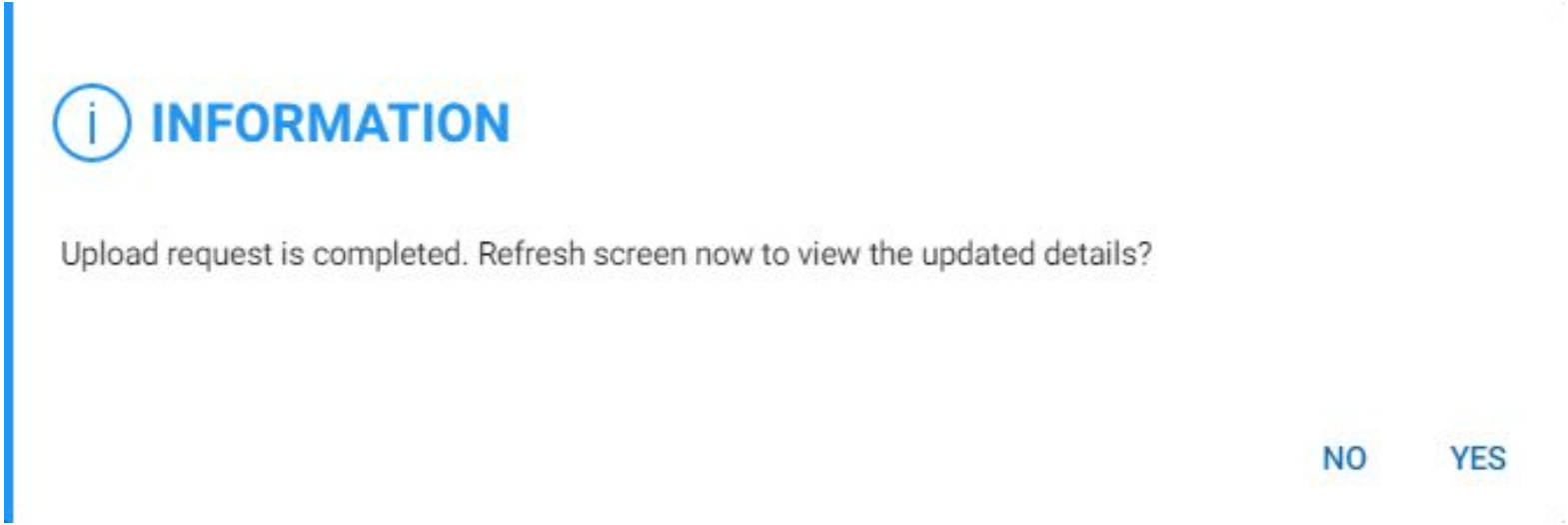


Price Sheets

Not recommended: Downloading a Price Sheet

You need to **refresh the page once**, to view the response of the platform.

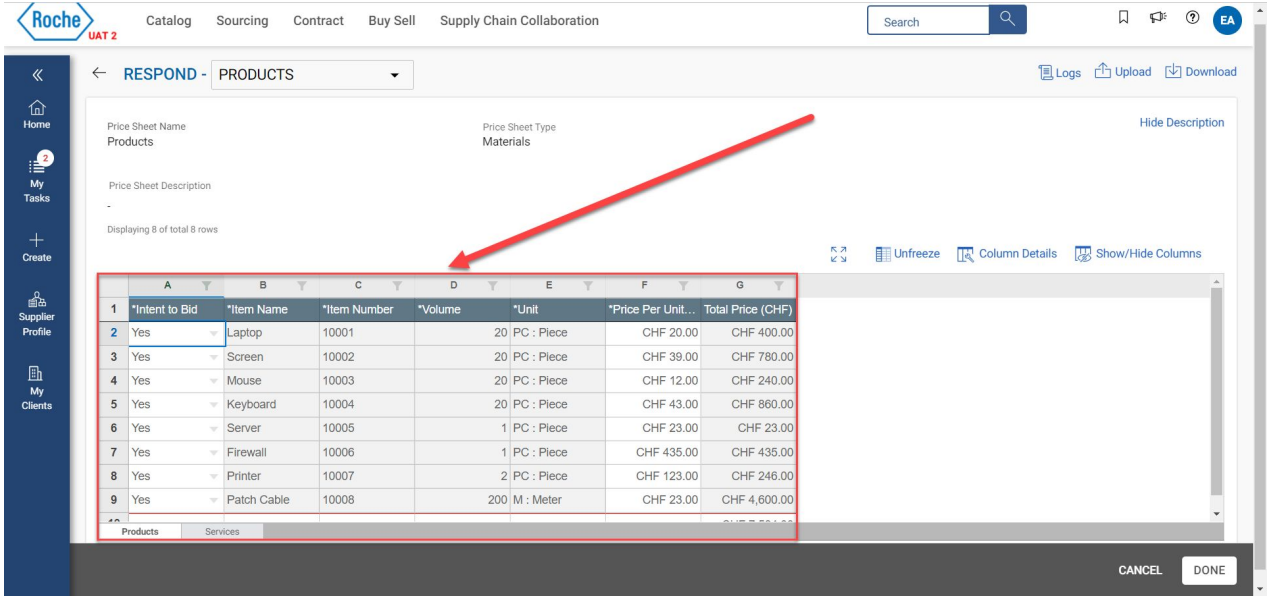
Click Yes to see the implemented Price Sheet.



Price Sheets

Not recommended: Downloading a Price Sheet

You will now see that your MS Excel Price Sheet has been successfully migrated to myBuy.



	A	B	C	D	E	F	G
1	*Intent to Bid	*Item Name	*Item Number	*Volume	*Unit	*Price Per Unit...	Total Price (CHF)
2	Yes	Laptop	10001	20	PC : Piece	CHF 20.00	CHF 400.00
3	Yes	Screen	10002	20	PC : Piece	CHF 39.00	CHF 780.00
4	Yes	Mouse	10003	20	PC : Piece	CHF 12.00	CHF 240.00
5	Yes	Keyboard	10004	20	PC : Piece	CHF 43.00	CHF 860.00
6	Yes	Server	10005	1	PC : Piece	CHF 23.00	CHF 23.00
7	Yes	Firewall	10006	1	PC : Piece	CHF 435.00	CHF 435.00
8	Yes	Printer	10007	2	PC : Piece	CHF 123.00	CHF 246.00
9	Yes	Patch Cable	10008	200	M : Meter	CHF 23.00	CHF 4,600.00

Price Sheets

Copy & Paste from MS Excel to myBuy Price Sheet

It is also possible to copy values from your MS Excel spreadsheets using **CTRL + C** and paste them directly into the myBuy Price Sheet using **CTRL + V**.

Price Sheet Name:	Products
Price Sheet Type:	Materials
Description:	

Column Type :	Drop Down	Text	Text	Numeric	Drop Down	Currency	Computed
Column Name:	*Intent to Bid	*Item name	*Item number	*Volume	*Unit	*Price per unit(CHF)	Total price(CHF
	Yes	Laptop	10001	20	PC : Piece	CHF 20.00	CHF 400.00
	Yes	Screen	10002	20	PC : Piece	CHF 39.00	CHF 780.00
	Yes	Mouse	10003	20	PC : Piece	CHF 12.00	CHF 240.00
	Yes	Keyboard	10004	20	PC : Piece	CHF 43.00	CHF 860.00
	Yes	Server	10005	1	PC : Piece	CHF 23.00	CHF 23.00
	Yes	Firewall	10006	1	PC : Piece	CHF 435.00	CHF 435.00
	Yes	Printer	10007	2	PC : Piece	CHF 123.00	CHF 246.00
	Yes	Patch Cable	10008	200	M : Meter	CHF 23.00	CHF 4'600.00

	A	B	C	D	E	F	G
1	*Intent to Bid	*Item Name	*Item Number	*Volume	*Unit	*Price Per Unit...	Total Price (CHF)
2	Yes	Laptop	10001	20	PC : Piece	CHF 20.00	CHF 400.00
3	Yes	Screen	10002	20	PC : Piece	CHF 39.00	CHF 780.00
4	Yes	Mouse	10003	20	PC : Piece	CHF 12.00	CHF 240.00
5	Yes	Keyboard	10004	20	PC : Piece	CHF 43.00	CHF 860.00
6	Yes	Server	10005	1	PC : Piece	CHF 23.00	CHF 23.00
7	Yes	Firewall	10006	1	PC : Piece	CHF 435.00	CHF 435.00
8	Yes	Printer	10007	2	PC : Piece	CHF 123.00	CHF 246.00
9	Yes	Patch Cable	10008	200	M : Meter	CHF 23.00	CHF 4,600.00

Products | Services

6.8 Attachments

Attachments

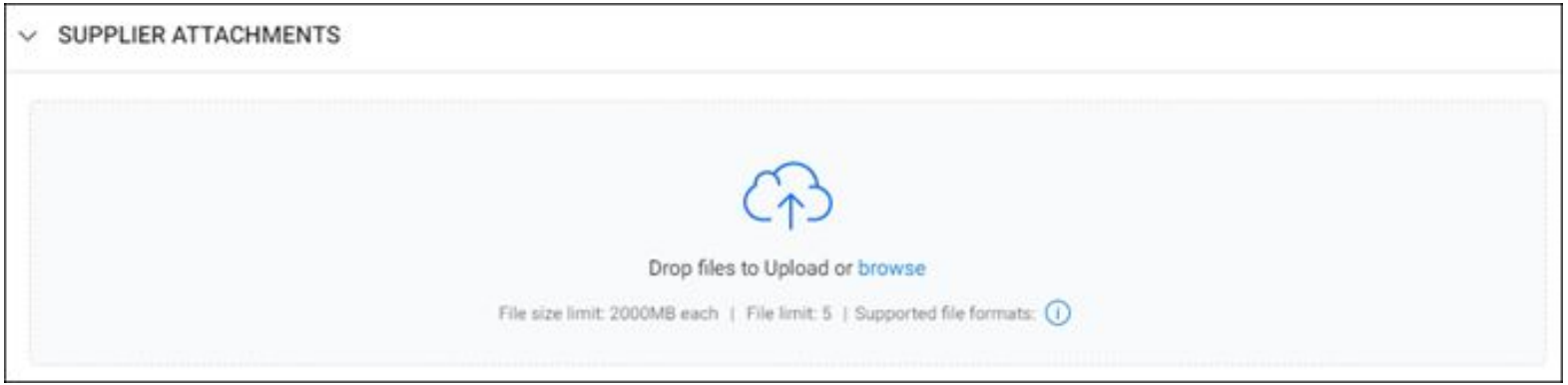
Important Information

The **Attachments** section displays all the attachments and support documents added by the Roche Sourcing Manager.

The attachments added by the Roche Sourcing Manager are displayed under the Buyer tab.

You can also add your own attachments.

The attachments added by you are displayed under the Supplier tab.



7. Discussion Forum

Discussion Forum

Introduction

Using the **Group Discussion Forum**, you can view and take part in various discussion topics that are created by the Roche Sourcing Manager, as well as create your own topics.

The **Group Discussion Forum** becomes active only after the event is published and you have confirmed participation.

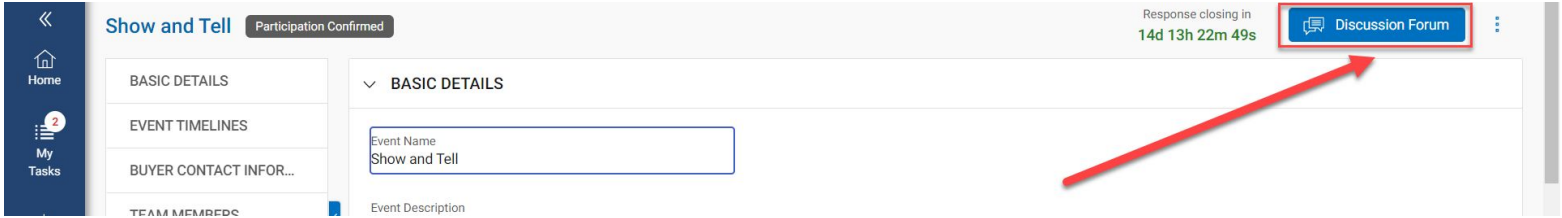
Important Information:

Any topics that you create are visible only to the Roche Sourcing Manager.

Discussion Forum

Open Discussion Forum

To open the discussion forum, click the Discussion Forum icon, displayed next to the event timer.



Important Information:

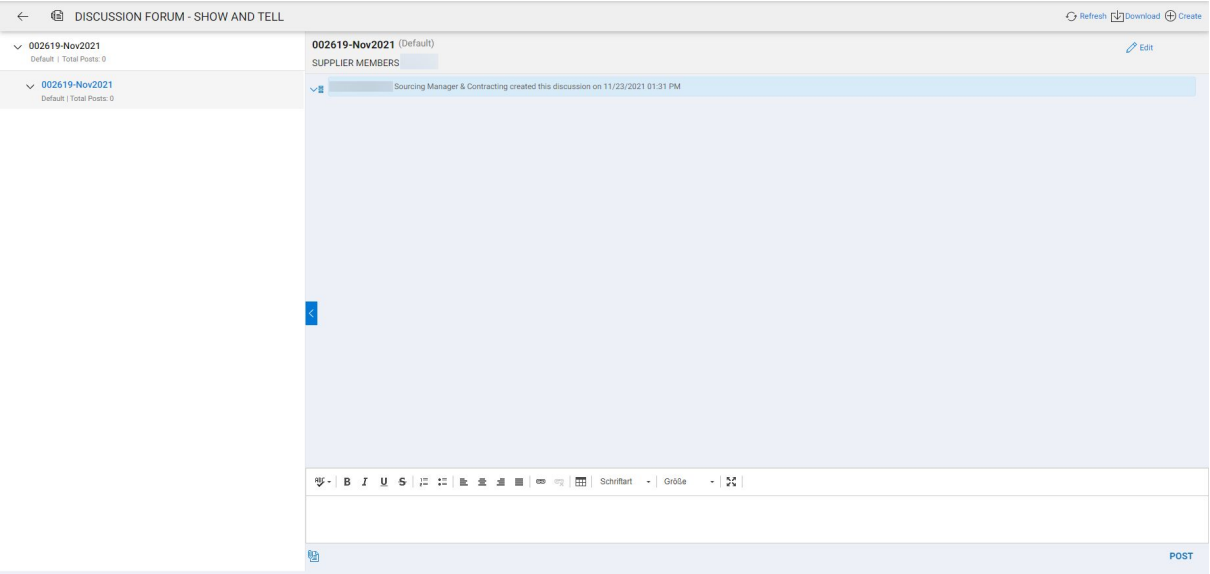
Only those team members who are invited to participate in the RFx event can view the icon.

Discussion Forum

Overview

The group discussion topic is displayed.

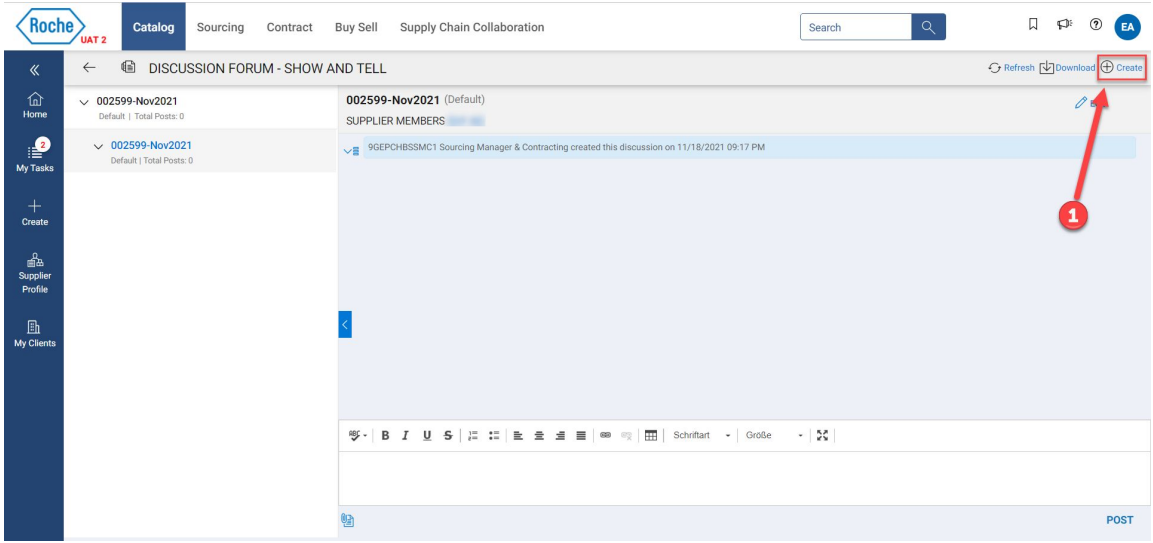
By default, the first topic, which is created by the application, has the same name as the RFx event.



Discussion Forum

How to initiate a discussion in the RFx event

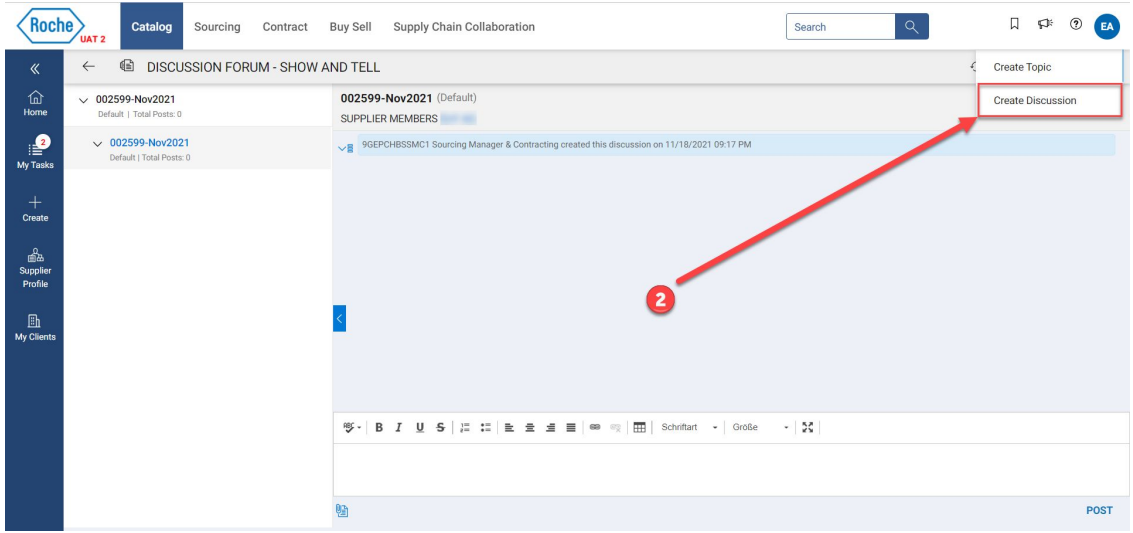
1. To create a **Discussion**, click the Create icon within the Discussion Forum



Discussion Forum

How to initiate a discussion in the RFx event

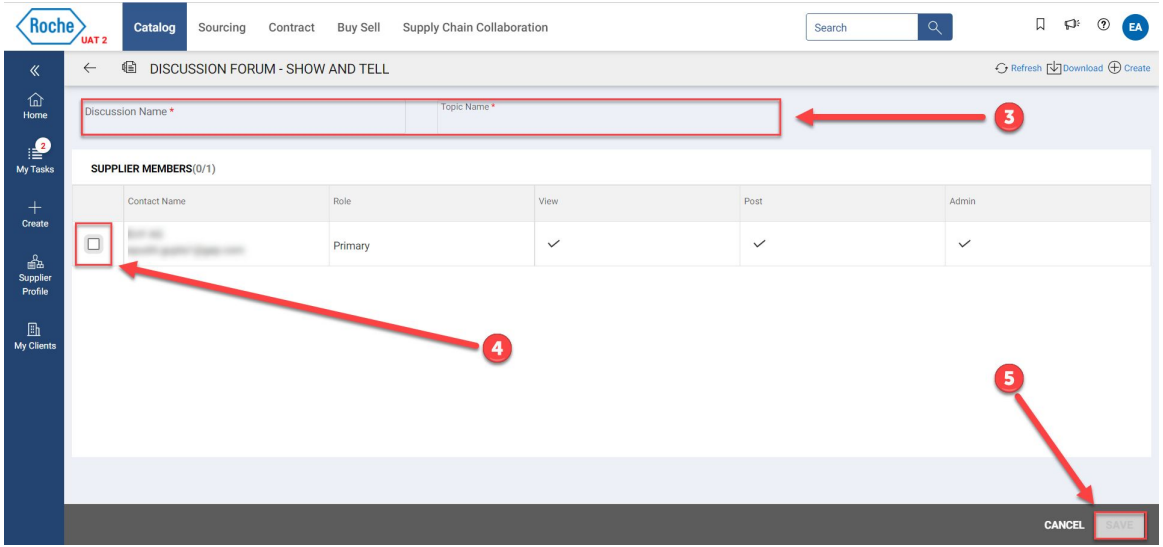
2. Then click on **Create Discussion**



Discussion Forum

How to initiate a discussion in the RFx event

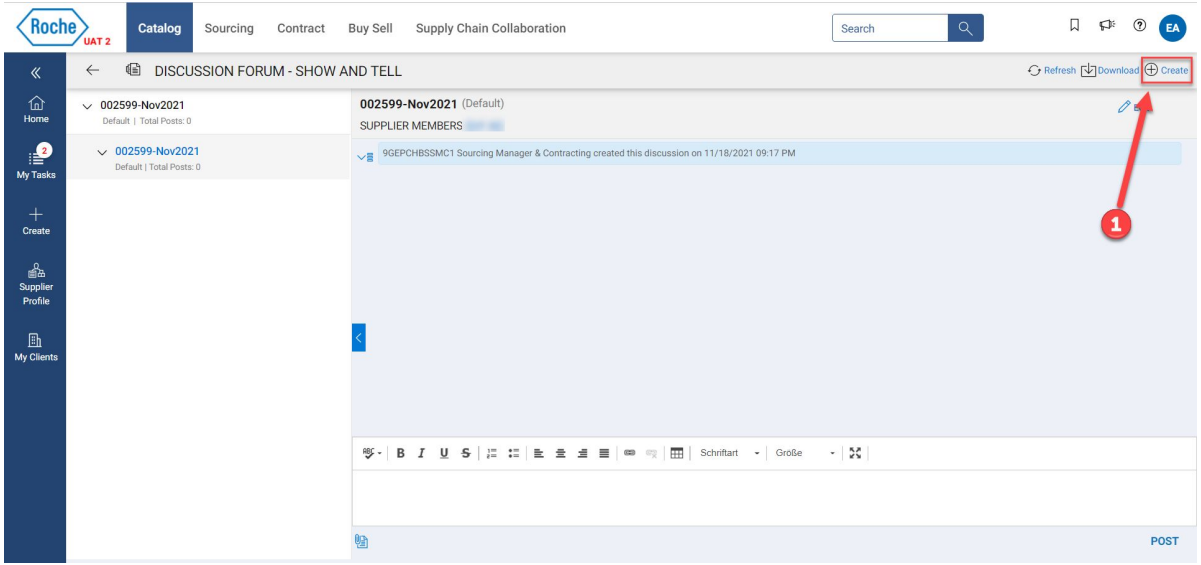
3. Type the **Discussion Name** and **select the Topic** to associate with the discussion
4. **Select the members** who should be part of the discussion
5. Click **Save**



Discussion Forum

How to create a topic in the RFx event

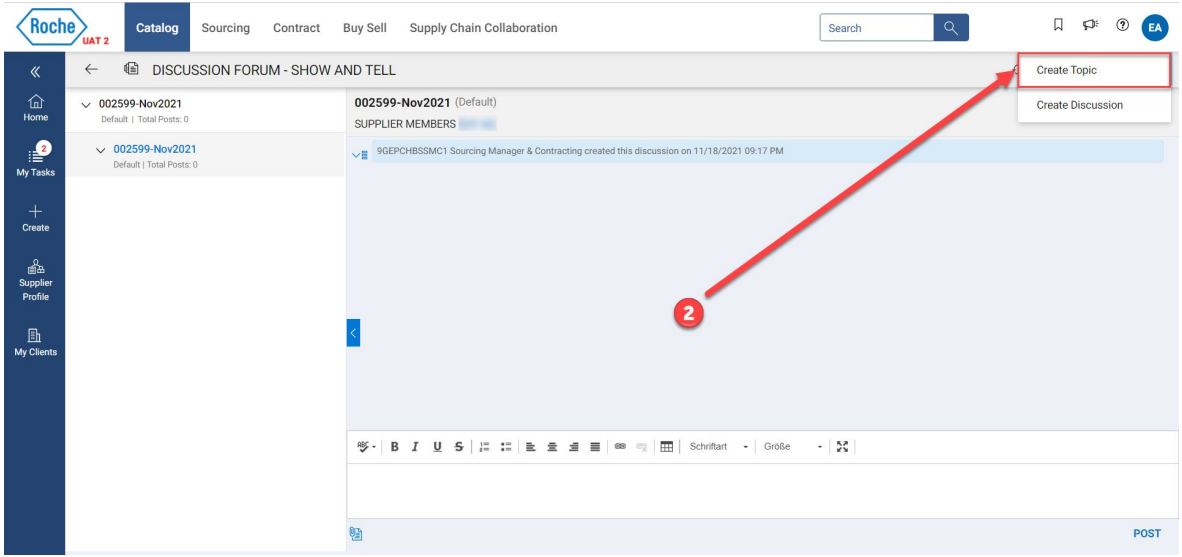
1. To create a **Topic**, click the Create icon



Discussion Forum

How to create a topic in the RFx event

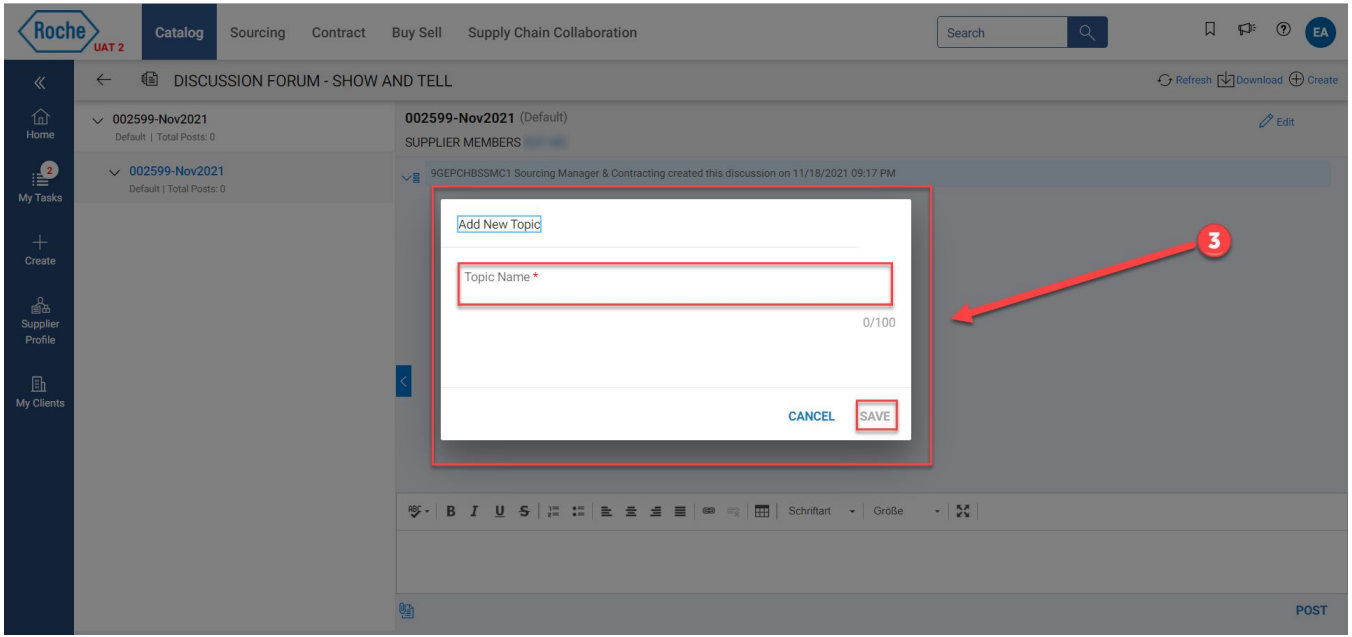
2. Then click on **Create Topic**



Discussion Forum

How to create a topic in the RFx event

3. Enter the **Topic name** and click **Save**



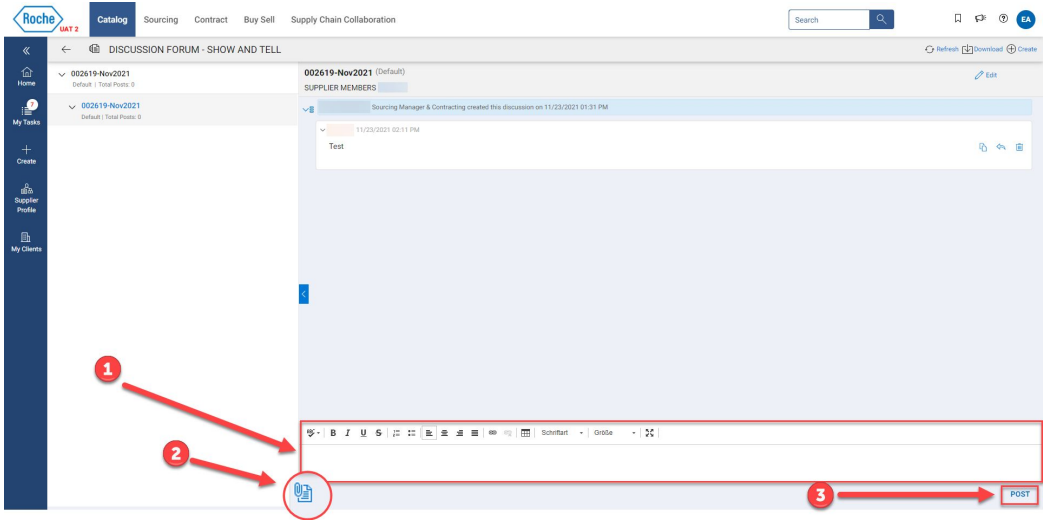
Discussion Forum

How to chat

1. Enter your **message/comment** in the space provided. You can use the **classic text editing options** if necessary

2. Of course, you can also **add attachments** to the conversation

3. To submit your message/comment, click on the **Post** button



Discussion Forum

Important Information

Important Information:

When you reply to a Roche Sourcing Manager's message,
only the Roche Sourcing Manager and his or her team members can view the reply.

Other suppliers cannot view it!

In an internal discussion, all team members can view a posted message.

Discussion Forum

Action Menu

In a group discussion, you can also take the following actions:

Field	Description
Edit	Edit the name of the discussion.
Refresh	Refresh the page.
Download	Download the group discussion.

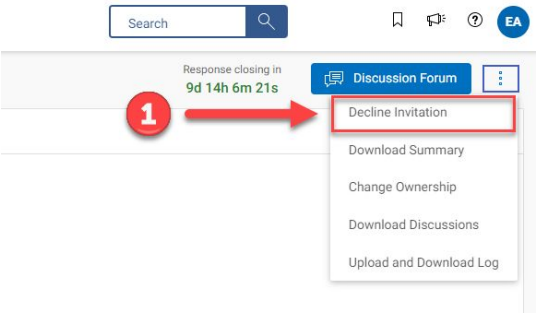
8. Performing Action Menu

Performing Action Menu

Decline Invitation

Even if you have agreed to participate in the RFx event, you have the option to **decline the invitation**.

1. Click the Actions ⋮ icon on the top-right corner of the RFx event and then click **Decline Invitation**



2. Click **Yes** on the following confirmation pop-up
3. Click **Ok** on the Success pop-up

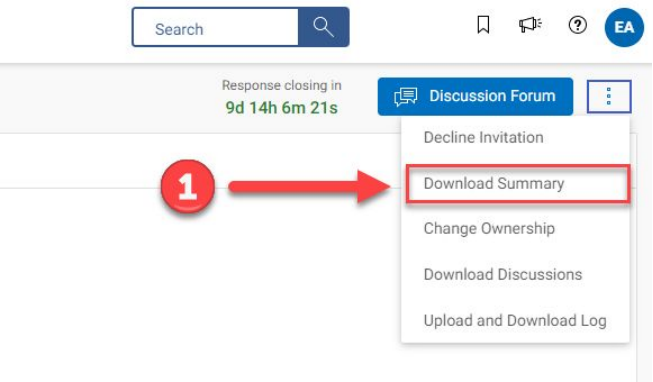
Performing Action Menu

Downloading Event Summary

The **Download Summary** option under the Actions menu helps you download a consolidated zip file containing the summary of the event, guidelines, price sheets, and questionnaires.

To download the event summary:

1. Click the Actions icon on the top-right corner of the event page and then click **Download Summary** from the options

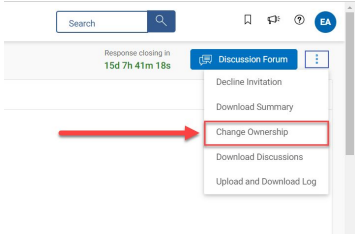


The event then gets downloaded into a zip file that contains the guidelines, price sheets, questionnaires, and the event summary.

Performing Action Menu

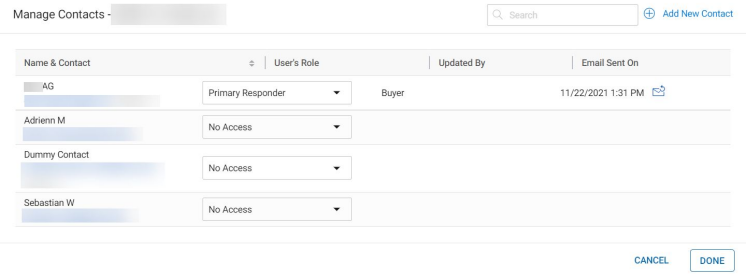
Change Ownership

1. If you want to **transfer the Primary Responder** role to another contact within your organisation, click the **Change Ownership** button



2. Now you can assign the Primary Responder role to one of your contacts within your organisation.

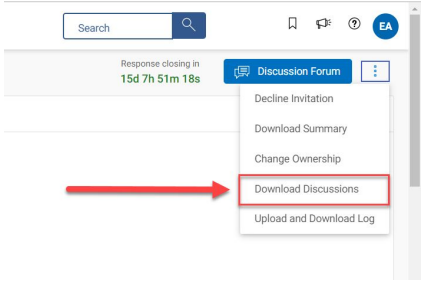
   Important Information: There can be only one Primary Respondent.



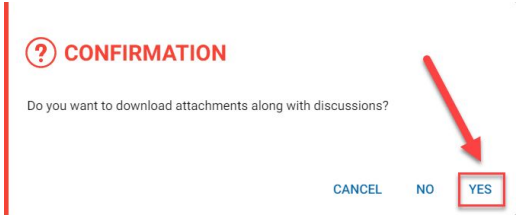
Performing Action Menu

Download Discussions

1. You have the option of **downloading your discussions** in the form of an MS Excel spreadsheet to your computer



2. You will be asked whether you want to download the pure conversations or the attachments too



Performing Action Menu

Download Discussions

3. Confirm the download by clicking on the **Download** button

4. The discussion will now be downloaded to your computer in form of MS Excel

Performing Action Menu

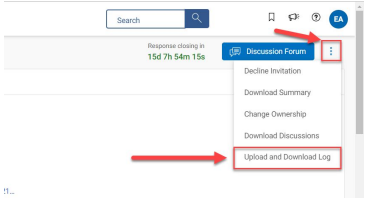
Viewing Upload/Download Logs

You can **view logs of all the uploaded/downloaded files**.

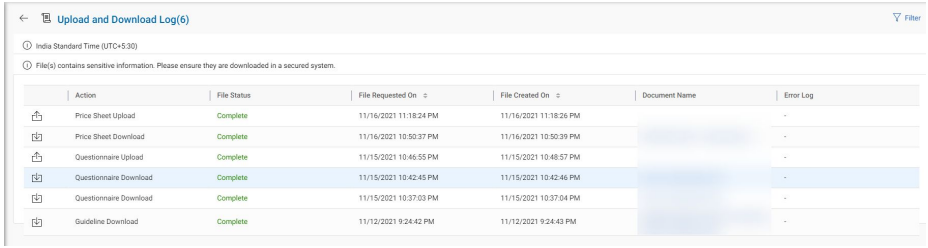
All the files that you upload/download from the Questionnaires or Price sheet section, for the RFx event are displayed, thus saving your time to navigate to various section to fetch the file.

To view the log:

Click the icon and then click **Upload and Download Log** icon on the upper-right corner of the RFx event page.



The following **Download Log page** will be displayed:



Action	File Status	File Requested On	File Created On	Document Name	Error Log
Price Sheet Upload	Complete	11/16/2021 11:18:24 PM	11/16/2021 11:18:26 PM		-
Price Sheet Download	Complete	11/16/2021 10:50:37 PM	11/16/2021 10:50:39 PM		-
Questionnaire Upload	Complete	11/15/2021 10:46:55 PM	11/15/2021 10:48:57 PM		-
Questionnaire Download	Complete	11/15/2021 10:42:45 PM	11/15/2021 10:42:46 PM		-
Questionnaire Download	Complete	11/15/2021 10:37:03 PM	11/15/2021 10:37:04 PM		-
Guideline Download	Complete	11/12/2021 9:24:42 PM	11/12/2021 9:24:43 PM		-

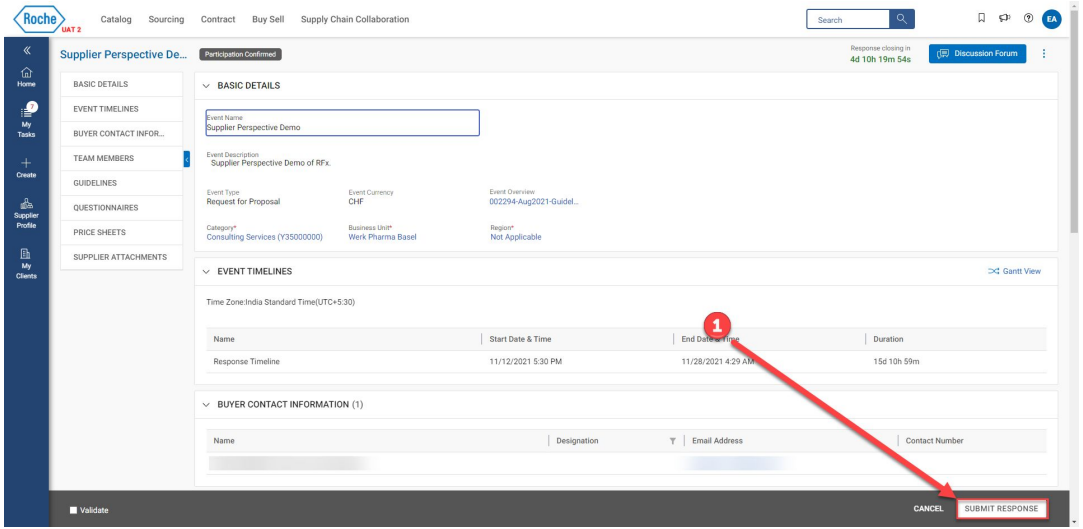
9. Submit Response

Submit Response

How to submit your Response

After viewing all the required details on the RFx and responding to the questionnaires and price sheets, as applicable, you can submit your responses to the Roche Sourcing Manager.

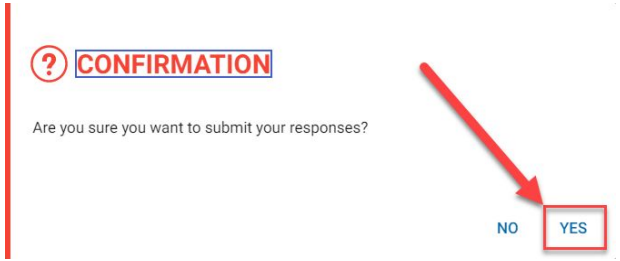
1. Click the **Submit Response** button on the bottom right corner of the RFx page to submit your response



Submit Response

How to submit your Response

2. Click **Yes** on the confirmation pop-up



3. Once the response is submitted, the status of the event changes to **Response Submitted**

10. Withdraw Response

Withdraw Response

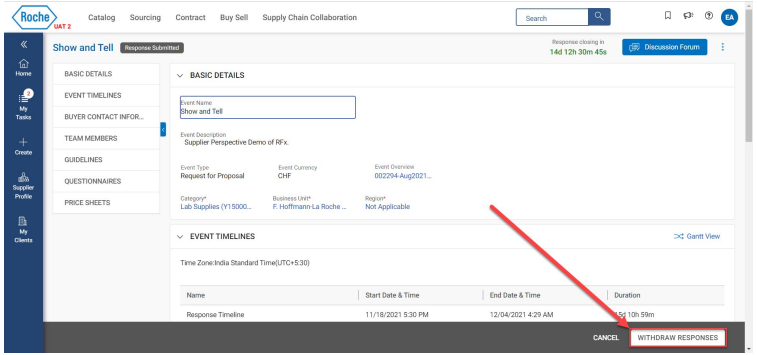
How to withdraw your submitted response

You can **withdraw your submitted responses** in a sourcing event, for revision or correction.

The revised responses can then be resubmitted until the Response timeline is active.

To withdraw responses:

1. Click the **Withdraw Responses** button at the bottom-right corner of the desired RFx event



2. Click **Yes** on the subsequent pop-up

Withdraw Response

How to withdraw your submitted response

3. **Mention the reason or comment of withdrawing your response** in the field provided

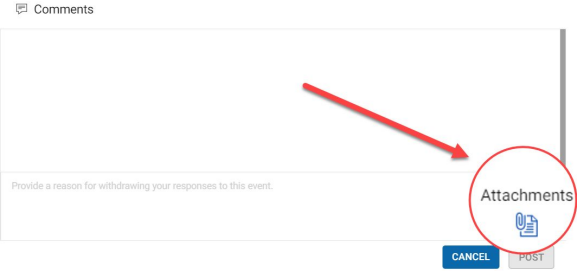
4. Click **Post**

Withdraw Response

How to withdraw your submitted response

Important Information:

You can also upload an attachment by clicking the attachment icon.



Once you have withdrawn your responses, you can modify it as required and resubmit it again.

For the resubmit you have to provide a comment.

The recommendation from Roche would be to indicate in your comment exactly what changes you have made compared to the original RFx (before you withdrew it).

Doing now what patients need next