

# VALUE CHAIN



eSourcing Training for Suppliers

# What is Coupa?

- Coupa is a cloud-based procurement platform. Coupa eSourcing facilitates finding, evaluating, and engaging suppliers and internal stakeholders for acquiring goods and/or services. It will be used to facilitate the entire Sourcing process transparently from:
  - Opportunity identification
  - Bid creation
  - Supplier engagement
  - Bid evaluation and ranking
  - Bid award
- Benefits of Coupa Sourcing:
  - Elimination of current manual processes
  - Portal for supplier bid submission
  - HUB evaluation
  - Supplier Bid scoring and evaluation

# How to Participate in a Sourcing Event

All bid opportunities are posted on the UTHealth Bid Opportunities website (<https://www.uth.edu/buy/bid-list.htm>).

Review the list for any bid opportunities in which you would like to participate. Locate the name of the buyer in charge of that specific bid.

Please email the Buyer with your intention to participate in bid # RFP/ITB 744-xyz.

The Buyer will add you to the Bid/Event in the Coupa Portal. You will then receive an email that includes the event details and an invitation to participate in the sourcing event.

Follow the instructions on the email to access the Event.

# Event invitation email

Once a buyer launches an event, Suppliers will receive an email that provides information about the bid:



UT Health has invited you to the sourcing event: ITB 744-B2018 Avaya Aura 8 Upgrade.

UTHealth is soliciting bids from qualified and experienced vendors to provide an upgrade to our Avaya phone system to Aura 8.X.

Key Events Schedule:

Issue Invitation to Bid	Monday June 1, 2020
PreBid Meeting	Monday June 15, 2020 @ 10:00AM CST via WebEx
Last Day for Questions	Thursday June 18, 2020 at 2:00PM CST
Bid Submittal Deadline	<b><u>Monday June 29, 2020 at 10:00AM CST</u></b>
HUB Submittal Deadline	Tuesday June 30, 2020 at 2:00PM CST

You must accept the Terms and Conditions in order to participate in this event. Click on "View Event" to see the event details and timeline, then accept the terms and conditions of ITB 744-B2018 Avaya Aura 8 Upgrade event.

Click the "My Responses" tab to provide your response, which may include Attachments, Forms, and Items.

Any questions regarding this ITB should be directed to Martha G. Amaya via e-mail at [martha.g.amaya@uth.tmc.edu](mailto:martha.g.amaya@uth.tmc.edu).

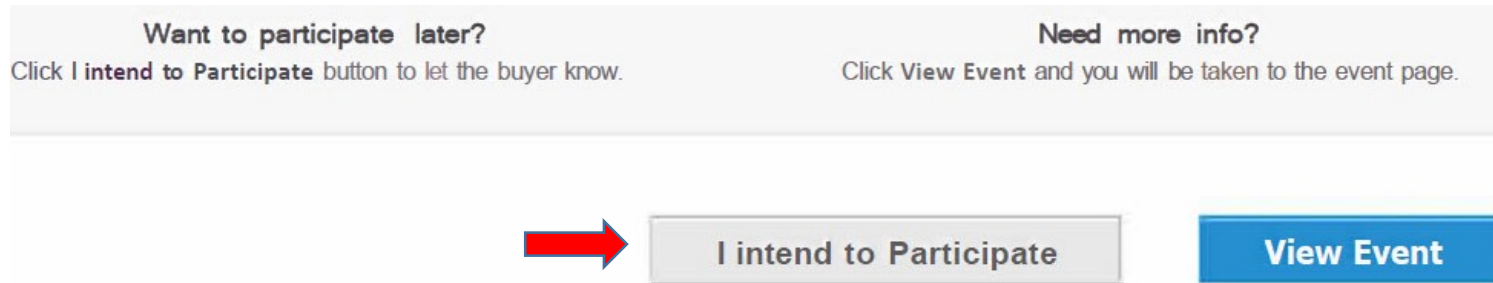
Thank you,

UTHealth Procurement Services

Response due date: Monday, 29 June 2020 10:00 AM CDT

# Intent to Participate

At the bottom of the invitation email, Suppliers have the option to indicate their intent to submit a bid response by clicking the “I intend to Participate button” below:



This will take you to the event page. You must click the checkbox next to “I intend to participate in this event”, review the Terms & Conditions document, and accept the T&Cs to proceed with the event.

UTHealth Procurement Services

Event Ends **25 : 01**  
days hrs

Do you intend to participate in this event?

**I intend to participate in this event**  
Event owner will be notified of your intent to participate.

**Accept Terms and Conditions**

**Terms and Conditions**

[ITB\\_744-B2018\\_Terms\\_and\\_Conditions.pdf](#)

**Do you accept these Terms and Conditions?**

Yes  
 No

**Send to Event Owner**

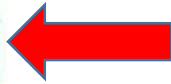
# View Event

If a Supplier is ready to respond to the event, they can click on “View Event” from the email. You will still need to accept the Terms and Conditions to proceed to the response section of the event:

<p><b>Want to participate later?</b> Click <b>I intend to Participate</b> button to let the buyer know.</p>	<p><b>Need more info?</b> Click <b>View Event</b> and you will be taken to the event page.</p>
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<p><b>I intend to Participate</b></p>	<p><b>View Event</b></p>
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# Bid Response (Attachments)

If a Supplier is ready to respond to the event, they can click on “View Event” from the email. You will still need to accept the Terms and Conditions to proceed to the response section of the event.

You will then see the Attachments associated with the event:

The screenshot displays a web interface for a bid response. At the top, there are two tabs: "Event Info" and "My Response", with "My Response" being the active tab. Below the tabs is a yellow notification bar stating "Gabby Amaya made the following changes to this event". Underneath is a section titled "Attachments" with a paperclip icon. The main content area is split into two columns. The left column is titled "Provided by Gabby Amaya" and contains the text "Execution of Offer" and "Instructions: Complete, sign, and upload the Execution of Offer. Failure to return the completed Execution of Offer with the bid may result in rejection of bid." Below the instructions is an "Attachment" section with a red arrow pointing to a file named "ITB\_744-B2018\_ITB\_Execution\_of\_Offer...". The right column is titled "Your response" and contains the text "Response to Execution of Offer" and "Attachment \*". Below this is a red arrow pointing to the "Add File" link, with a red text label "Upload your completed Execution of Offer file here".

You must download the document, respond to the questions and save your document.

# Bid Response (Attachments)

Repeat these steps with the remaining attachments:

## Respondent Questionnaire

### Instructions

Respondents are requested to submit complete responses to each item listed in the Respondent Questionnaire. Reference each response by its item number indicated and upload responses as an attachment to your bid.

### Attachment



## Exhibit A - HUB Subcontracting Plan

### Instructions

Each Respondent must complete and upload the HSP in accordance with the terms and conditions of this ITB, including Exhibit A. Proposers that fail to do so will be considered non-responsive to this ITB in accordance with Section 2161.252, Texas Government Code.

### Attachment

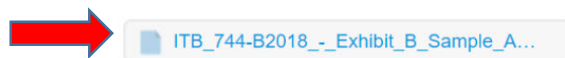


## Exhibit B - Sample Agreement

### Instructions

The terms and conditions contained in the attached Agreement (ref. Exhibit B) or at the sole discretion of University, terms and conditions substantially similar to those contained in the Agreement, will constitute and govern any agreement that results from this ITB.

### Attachment



## Response to Respondent Questionnaire

### Attachment \*

Add File



Download the Questionnaire, complete the form and upload your response here.

## Response to Exhibit A - HUB Subcontracting Plan

### Attachment \*

Add File



Upload your HUB Subcontracting Plan here if one is required for the bid.

## Response to Exhibit B - Sample Agreement

### Attachment \*

Add File

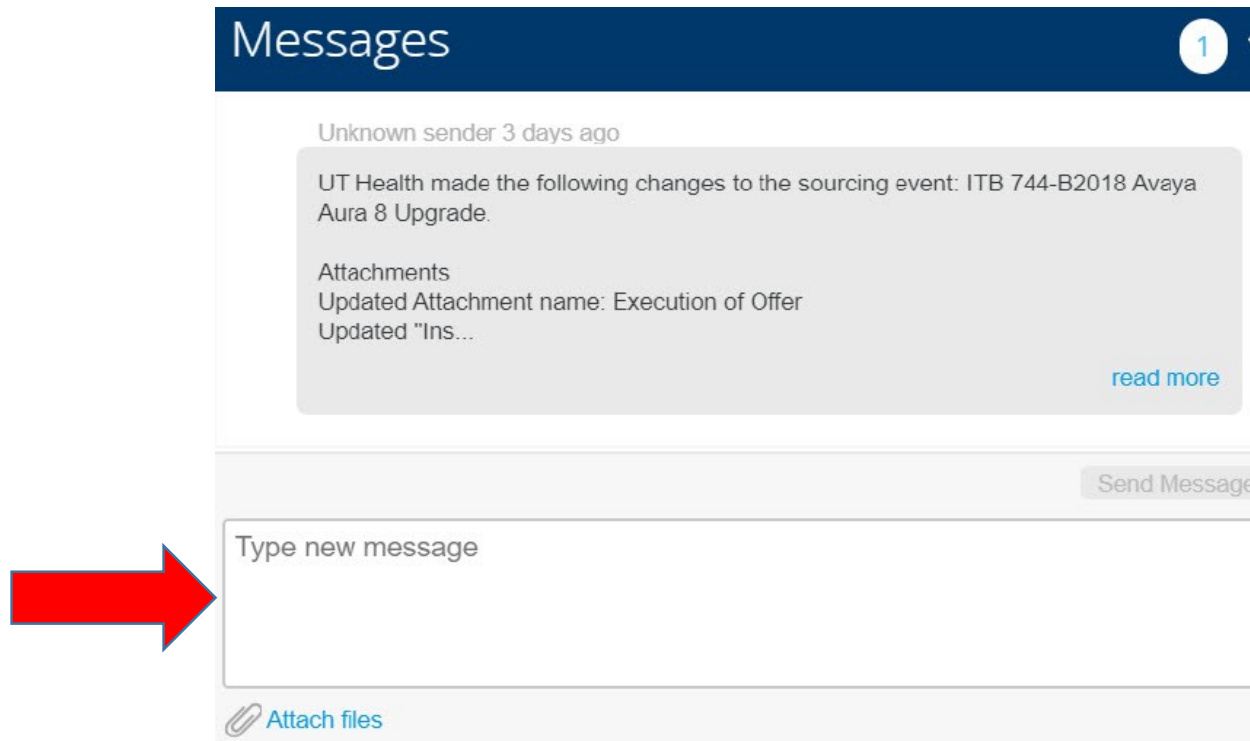


Review the UHealth Agreement and mark up any requested changes if applicable.



# Message Feature

On the bottom left of the screen, there is a “Messages” box. Click this to open a window to send the Buyer a message.



# Bid Response (Delivery section)

Complete the Delivery Form to provide the number of days to deliver goods/services and to provide the Prompt Payment Discount if applicable:

1. Delivery Form (Supplier to complete)

Please answer the questions below.

Event Ends 25 : 00  
days hrs

Delivery:

I. Enter delivery schedule in calendar days (numeric value).

II. University's standard payment terms for services are "Net 30 days." Proposer agrees that University will be entitled to withhold five percent (5%) of the total payment due under the Agreement until after University's acceptance of the final work product. Indicate the prompt payment discount (in percentage and number of days) that Proposer will provide to University. For example 5% net 20. Enter a zero (0) if a discount will not be provided.

III. Vendor must attach a projected payment schedule, from start to finish, to complete this upgrade. All work must adhere to the University's change approval process.

If you have any questions in regards to Delivery, contact Martha G. Amaya at [martha.g.amaya@uth.tmc.edu](mailto:martha.g.amaya@uth.tmc.edu).

**\* I. Delivery Schedule**

Calendar days to deliver goods to the University (numeric value).

**\* II. Prompt Payment Discount**







Prompt Payment Discount: \_\_\_\_\_ % \_\_\_\_\_ days/net 30 days (enter 0 if not applicable).

**\* III. Payment Schedule** [testdocument.docx](#)  
(Change, Clear)

# Bid Response (Pricing)

Submit Pricing in the “Items and Lots” section of the event form by entering your line pricing under the “My Price” column:

## ☰ Items and Lots

Name	Expected Qty	My Price	Price x Expected Qty
 <b>Items Not In Lots (20 items)</b>			<b>561.0000 USD</b>
 <b>UCT Data Center (UDC) - Application Enablement Services (AES) Geo Redundant - Calabrio (See attachment for more details).</b>	1 (Each) x	<input type="text"/> * =	0.00 USD
 <b>AES - Secure E911</b>	1 (Each) x	<input type="text"/> * =	0.00 USD
 <b>Avaya Experience Portal - Media Processing Platform</b>	1 (Each) x	<input type="text"/> * =	0.00 USD
 <b>Aura Media Servers</b>	2 (Each) x	<input type="text"/> * =	0.00 USD
 <b>Call Management System</b>	1 (Each) x	<input type="text"/> * =	0.00 USD

# Bid Response (Pricing)

You can also use the “Export to Excel” button to download an Excel pricing template. Complete the Excel form, save the file, and then hit the “Import from Excel” button to upload your document:

AES - Calabrio -Geo	1 (Each)	x	<input type="text"/>	=	0.00 USD
Aura Media Servers	2 (Each)	x	<input type="text"/>	=	0.00 USD
					Total 0.00 USD




[Export to Excel](#) [Import from Excel](#) [Load History](#) [Save](#) [Submit Response to Buyer](#)

The White Cells below are your entry fields. You can upload this file to save the information you entered in the editable cells to your response. NOTE: This Excel file is locked to ensure it uploads correctly, and you must still click "submit" after uploading to submit!


Field Name	required	Your Responses	Quantity	UOM	Information / Hints
Items Not in Lots (Below)	N	Nothing Required	N/A	N/A	
Your Unit Price for "UCT Data Center (UDC) - Application Enablement Services (AES) Geo Redundant - Calabrio (See attachment for more details).":	Y*	100	1	Each	
Currency:	Y*	USD			
Your Item Name:	N	test1234			
Your ID/Part Number:	N	xyz123544			
Your Description:	N	test description			
Your Lead Time:	N	14 days			

# Bid Response (Submit)

After completing pricing, click the “Submit Response to Buyer”:

 Session Manager 4 - Sip Routing	1 (Each)	x	<input type="text" value="44.00"/> * =	44.00 USD
 AES - Calabrio -Geo	1 (Each)	x	<input type="text" value="44.00"/> * =	44.00 USD
 Aura Media Servers	2 (Each)	x	<input type="text" value="43.00"/> * =	86.00 USD


Total 750.00 USD

[Export to Excel](#) [Import from Excel](#) [Load History](#) [Save](#) [Submit Response to Buyer](#) 

If any required Attachments were left off, you will receive an error message directing you to upload all required documents.

Please add required attachments

[Event Info](#) [My Response](#)

 Gabby Amaya made the following [changes](#) to this event

 **Please fix the errors below**

- Please add required attachments

# Response Submitted

After submitting response, Supplier will see the message below indicating the response was submitted to the Buyer:

ITB 744-B2018 Avaya Au... - Event #18 Active




To edit response after submitting, hit the “Edit Response” button, make the necessary edits, and then hit the “Submit Response to Buyer” button. (Note – you may only edit your response up to the time of the Bid Deadline):

[Event Info](#) [My Response](#)


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Responded on 06/04/20

 Attachments

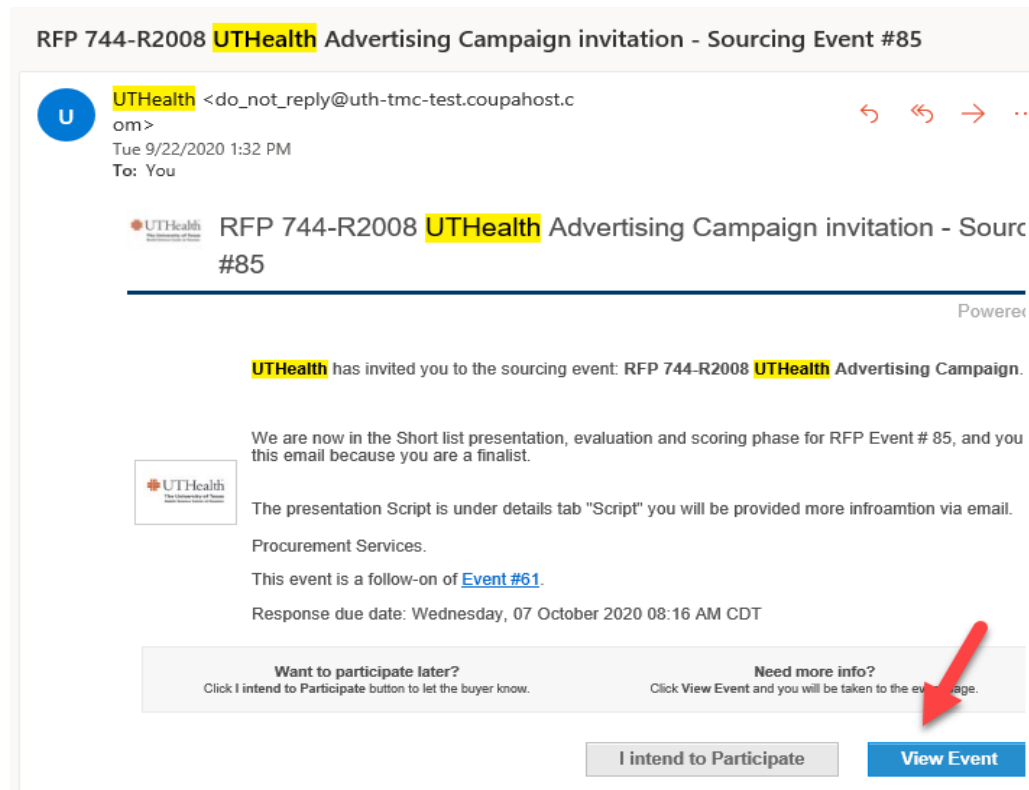
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Provided by Gabby Amaya		Your response
Execution of Offer		Response to Execution of Offer

 [Edit Response](#)

# Shortlist (Follow-On Event)

After the initial round of evaluations, the team may decide to move into shortlist presentations. If your company is chosen to participate in the shortlist, you will receive an email notifying you of the follow on event. Click View Event from the email.



RFP 744-R2008 **UTHHealth** Advertising Campaign invitation - Sourcing Event #85

**U** **UTHHealth** <do\_not\_reply@uth-tmc-test.coupa.com>  
Tue 9/22/2020 1:32 PM  
To: You

**UTHHealth** RFP 744-R2008 **UTHHealth** Advertising Campaign invitation - Sourcing Event #85

**UTHHealth** has invited you to the sourcing event: RFP 744-R2008 **UTHHealth** Advertising Campaign.

We are now in the Short list presentation, evaluation and scoring phase for RFP Event # 85, and you this email because you are a finalist.

**UTHHealth** The presentation Script is under details tab "Script" you will be provided more information via email. Procurement Services.

This event is a follow-on of [Event #61](#).

Response due date: Wednesday, 07 October 2020 08:16 AM CDT

**Want to participate later?**  
Click I intend to Participate button to let the buyer know.

**Need more info?**  
Click View Event and you will be taken to the event page.

# Shortlist (Follow-On Event)

Supplier must check the box next to “I Intend to participate in this event” and select Yes to accept the terms and conditions. Then Enter Response.

RFP 744-R2008 UTHealth... - Event #85 Active

Intend to respond is saved. ✕


Event Ends **39 : 30**  
mins secs


[Event info](#) [My Response](#)


UTHealth has invited you to the sourcing event: RFP 744-R2008 UTHealth Advertising Campaign. If you intend to participate, review the event timeline and accept the terms and conditions of the event, if applicable. Click the "My Responses" tab to provide your response, which may include Attachments, Forms, and Items and Lots.


Do you intend to participate in this event?

I intend to participate in this event  
Event owner will be notified of your intent to participate.

 Do you intend to participate in this event?

  I intend to participate in this event

 **Send to Event Owner**

 **Send to Event Owner**

**Accept Terms and Conditions**

Terms and Conditions  
[RFP\\_GENERAL\\_T-Cs.docx](#)

Do you accept these Terms and Conditions?

Yes  
 No

**Event Information & Bidding Rules**

Event will end at the Event End Time.  
Responses are sealed until event closes

**Buyer Attachments**

[RFP\\_744-R2008\\_-\\_Event\\_Information.d...](#)

**Event Follow-On Information**

This event is a **Event #81** follow-on of

**Timeline**

Event Start	Event End
Sep 22 08:32 AM US/Central 14d : 23h : 43min	Oct 7 08:16 AM US/Central 00:00

**Send to Event Owner**

**Event Information & Bidding Rules**

Event will end at the Event End Time.  
Responses are sealed until event closes

**Buyer Attachments**


[RFP\\_744-R2008\\_-\\_Event\\_Information.d...](#)

**Event Follow-On Information**

This event is a **Event #81** follow-on of

**Timeline**

Event Start	Event End
Sep 22 08:32 AM US/Central 14d : 23h : 43min	Oct 7 08:16 AM US/Central 00:00

 **Enter Response**



# Shortlist (Follow-On Event)

You must review the Shortlist Script attachment and provide a response to the questions in the Shortlist Scoring section, if applicable. Then hit Save.

Event Ends 56 : 58 mins secs

Shortlist Script

**Instructions**  
Please prepare a presentation, see attached Script. You will be given 30min for the presentation.

**Attachment**  
Shortlist\_Script.pdf

Attachment  
Add [File](#)

Forms

- 1. Reputation of Proposer - Additional Questions Specific to this RFP (Supplier to complete)
- 2. Quality of Proposer's Material (Supplier to complete)
- 3. Copy of Shortlist Scoring

Please answer the questions below.

\* Supplier Background  Yes  
 No  
You must respond this question.

\* Supplier provided all the answer to the script questions ons  Yes  
 No  
You must respond this question.

Save

# Shortlist (Follow-On Event)

Review the changes and check “I have reviewed the change to this event” box, and click the “Submit Response to Buyer” button.

complete)

2. Quality of Proposer's Material (Supplier to complete) >

3. Copy of Shortlist Scoring >

Please answer the questions below.

\* Supplier Background  Yes  
 No  
You must respond this question.

\* Supplier provided all the answer to the script questions ons  Yes  
 No  
You must respond this question.

Save

Items and Lots

Name	Expected Qty	My Price	Price x Expected Qty >
Items Not in Lots (3 items)			12,165,320.0000 USD
Media and Launch	1 (EACH) x	500,320.00 *	500,320.00 USD
Billboards	1 (EACH) x	11,567,000.00 *	11,567,000.00 USD
Newspaper and TV slots	1 (EACH) x	98,000.00 *	98,000.00 USD
Total			12,165,320.00 USD

I have reviewed the changes to this event

Export to Excel Import from Excel Load History Save **Submit Response to Buyer**

Thank You!

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