

# Global Procurement Tool (BravoSolution) – Suppliers Quick Guide



This guide is to be used by Suppliers when using Bupa’s Global Procurement Tool to; register, respond to an eRFx, participate in an eAuction, or review a contract you have entered into with Bupa. Click on a topic in the contents to be taken to the relevant section.

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## 1. Bupa’s Global Procurement Tool (GPT)

In order to increase visibility, management and leverage of Supplier relationships on a global scale, Bupa has implemented a global tool to support their sourcing and contracts management process. The tool, referred to as Bupa’s Global Procurement Tool, is hosted by BravoSolution. The eSourcing module provides a simple, secure and efficient means for managing tendering and auction activities with Suppliers. The eContracts Management module provides a secure document storage repository, with the ability to send system alerts to the relevant Buyer and Supplier prompting; contract renewal, approaching contract milestones (vendor/price reviews) and on contract expiry to allow parties to pro-actively manage the contract.

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### 1.1 How will this tool benefit me?

- Single registration site for Suppliers for the opportunity to be invited to tenders run by Bupa’s businesses globally
- Single tool for tendering, auctions and contracts management for ease of use


- Save time in responding to frequent tenders – the tool remembers your responses to previous tenders and pre-populates these responses to questions for future tenders
- Prepare responses offline - you are able to download our tender into a spreadsheet, answer the questions off line with your colleagues, and then upload your response accordingly
- Ability to view all of your contracts with Bupa business units globally on one site

## 2. Register as a Supplier on Bupa's GPT

Here is the link to Bupa's GPT – <http://bupa.com/Procurement>




We invite you to register on our portal. Registration is simple, free and is a requirement to enable you to be invited to any tendering events, auctions and enter into any contracts.

### To register:

1. Navigate to <http://bupa.com/Procurement>
  2. Click **Register here** in the middle of the page
  3. Complete your company details then click  – NB: the user details entered will be the main contact from your company
- Once registered you will receive an email with a password and access to the system
  - You will be required to accept T&C's of using the tool and change your password on first log on
  - Should you have colleagues who require access to the tool, see section 3 of this guide to add them as a contact
  - Each company can only be registered once
  - The person who registers the company is considered the main supplier contact and will be the only user to have the rights to register additional Users from your company. See section 3.2.
  - All communication/invitations to tender or Auction will always be sent to the main supplier contact, in addition to the particular contact that is responsible for responding to tenders/auction.
  - See section 7 for Help & Support



## 3. Edit Users & Organisation Profile

Once logged into the tool, you can edit your company profile and add additional colleagues to have user accounts. To ensure your company always has the ability to participate in Bupa's sourcing events, this area should be kept updated with current employees details. It is recommended that when you edit your profile you select a category against your Supplier registration. This will ensure that when Bupa Buyers are searching for Suppliers to invite to tender by category, that your Supplier record is identified.

- Click  from the menu on the left hand side, two tabs will open, click **Organisation Profile** this will take you into organisation Registration Data where you can; update your company profile by clicking 'Edit' in top right hand corner, view your Response History. To categories your company please repeat the first step and click **My Categories**. In this section you will be able to pick the relevant categories.
- For further instructions on what to do in each section click on  -> **Help for Suppliers** 











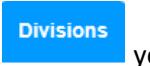




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### 3.1 Edit Company Profile

- Under section  you are able to view the company details you have registered with. Select  to update company details and main supplier contact details. NB: if you are not the main supplier contact on the registration, i.e. have been registered as an additional company contact, you will not be able to view or edit the company details, only your own.
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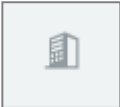
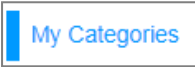




### 3.2 Add and Manage additional Colleagues to your Supplier Registration

This section may be useful if you have a large company and require multiple employees within your company to have user profiles to view/respond to RFX's and Auctions. This may be especially useful for global companies. NB: you will only be able to view and edit this section if you are the main supplier contact, or if you have been granted additional rights by the main supplier contact.

- **Create Additional Users:** Under section  and menu  you are able to add additional colleagues to have user profiles linked to the single supplier registration. Each colleague registered will receive their own User name and password. Select the  button. Complete your colleague's user details and select . Under the  menu option select the edit buttons to grant additional user rights to your colleague to allow them to respond to RFXs and participate in auctions.
  - **Create User Roles:** Under section  and menu  you can set up a standard role and assign user rights to this role. When setting up additional colleagues, you can simply assign the role to them removing the need to amend all of their User rights individually. Select the  button. Enter a role name and assign the rights to the role then select .
  - **Set Up Company Divisions:** Under section  and menu  you can set up your company divisions and assign these divisions to your colleague's user profiles. This may be useful if you have a large company and are setting up numerous users. This is especially useful for global companies if you wish to keep track of your Users. Select the  button. Enter a division name, complete details then select . Once a division is created, click on it to have further options to create departments and control the visibility across divisions.
  - **Assign Default Users:** Under section  and menu  you are able to identify which user is the default for Auctions and for RFIs/RFPs. This enables the Buyer to send RFX's and Auctions to the correct contact in your organisation. This means that the default user will have a default of being marked as 'involved' when your organisation is invited to RFX or Auction. NB: The buyer still has the option to add other users and to exclude this default user depending on the individual tender.
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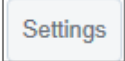
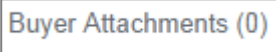








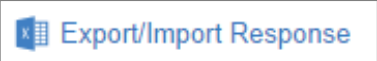
### 3.3 Categorise your Supplier Registration (recommended)

NB: you will only be able to view and edit this section if you are the main supplier contact, or if you have been granted additional rights by the main supplier contact.

- Under section  and menu  you are able to add categories to your profile from Bupa's taxonomy to identify the goods/services you deliver. When Buyers search by category for Suppliers to invite to RFX's and Auctions you will be identified. Select . The First level of Bupa's taxonomy will be displayed. You now have the option to; use the search functionality, click on the  icons next to the category you wish to drill down on to view the subcategories, or select  to view all categories. Select the categories relevant to your organisation and select .

## 4. Respond to an RFX

Suppliers can respond to RFX's which they have been invited to, and to RFX's open to all Suppliers. Refer to the portlet 'RFX Open to All Suppliers' on the dashboard to view and invite yourself to respond to open RFX's. Refer to the portlet 'My RFIs with Pending Responses' and 'My RFPs with Pending Responses' to view and respond to RFX's you have been invited to. Click on the RFX title in the relevant portlet to view details.

- View Details:** From the left hand  menu under  view the RFX details
- View Attachments:** Under  download and read any attachments from the Buyer
- Review Questions:** Under  review the questions contained in the RFX.
- Intention to Respond:** Once reviewed either select  or  then  and the Buyer will be notified. Follow the pop up message that appears with instructions on how to respond to questions.
- Responses:** Note if you have previously responded to RFX's issued by Bupa via the GPT, then your responses may already be populated with your previous answers. This will save you time in compiling your response as you only need to review and edit for any changes necessary.
- Complete Offline & Import:** If you prefer to complete your responses offline in excel and upload them, then select ,  then . Select the  button for instructions on how to complete the response form. When you are ready to upload your responses, select ,

select **Choose File** to browse and select your response file then select **Import Excel**. Any errors in the file will be displayed in a pop up message. Correct the errors then re-upload.

- **Submit Response:** There may be several envelopes containing questions which must be answered. The **My Response Summary** section provides detail on the number of mandatory and optional questions unanswered in each envelope. Once you have responded to all questions select

**Submit Response**

- **Re-submit Responses:** After responses are submitted, you have the ability to update and re-submit responses anytime before the RFX closing date & time. Note the Buyer has the ability to close the RFX prior to this if they wish.
- **Buyer Communication:** To communicate with the Buyer use the messaging functionality in the tool.

Select **Messages (Unread 0)** to send a message or view any messages the Buyer has sent to you.

- **Grant Colleagues Rights:** Select **Details** then **User Rights** to grant additional colleagues with rights to view the auction. Users must be registered. See section 3.2.





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- **Help:** If you require further help select the **Help for Suppliers** button or refer to section 7.
  - **View all RFXs with Bupa:** To view a history of all current and previous RFX's you have been invited to select **My RFIs** or **My RFPs** from the Quick Links portlet on the dashboard.

## 5. Participate in an Auction



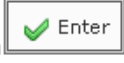
- **Training Auction:** A Buyer will often run a dummy/test auction for Suppliers with fake pre-bids prior to the real auction to allow Suppliers to understand the auction format clearly.
- **Auction Invite:** When a Buyer publishes an auction you will be sent an email invite.
- **View all Auctions with Bupa:** From the Quick Links portlet select **My Auctions**. All current and previous eAuctions your organisation has been invited to will be listed. Click on the Auction Title to view the Auction details.
- **Help:** If you require further help select the **Help for Suppliers** button or refer to section 7.

### 5.1 Before Participating in the Auction




- **Rules of Participation:** Depending on auction configuration, you may be required to download and agree to auction rules of participation prior to being given access. If this is the case a prompt will appear when you first try and gain access to the auction. It is recommended that you save any documents downloaded at this point for future reference.
- **View Details:** From the left hand **Auction Details** menu under **Settings** view the auction details
- **Review Attachments:** Under **Buyer Attachments (0)** download and read any attachments from the Buyer






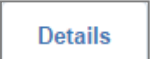
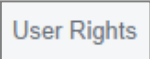
- **Review Bid Items:** Under  view the items you are to bid on in the auction. If pre-bids from tender are entered, review to ensure these are correct.
- **Buyer Communication:** To communicate with the Buyer use the messaging functionality in the tool. Select  to send a message or view any messages the Buyer has sent to you.
- **Grant Colleagues Rights:** Select ,  to grant additional colleagues with rights to view the auction. Users must be registered. See section 3.2.

## 5.2 During the Auction

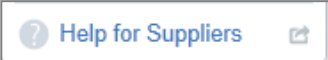

- **Sound Notifications:** It is recommended that your computer is not on mute as there are sound alerts for messages
- **Auction Format:** Note that what you view and how the auction is run is dependent on how the Buyer has setup the Auction. E.g. there may be an extension time, or you may be able to see your ranking. Refer to the Rules of Participation letter the Buyer has provided for the format of your auction. It is the Suppliers' responsibility to ensure they understand the auction format prior to participating in the real auction.
- **View Auction Monitor:** Approx 10 mins prior to the start of the Auction, the Auction Monitor will be available to view. Select . A new window will open. Select the option  then . The Auction Monitor will open and this is where you will place bids. There are three sections to your auction monitor:
  1. **Top Section** – if there is more than one lot to the auction they will be displayed here. You will need to click on each lot for the bottom sections to show details on them. This section shows the remaining time, and your current bid for each lot
  2. **Bottom Right Section** – the Bidding Area. The items in the lot will be displayed where you can enter and submit your bids.
  3. **Bottom Left Section** – Auction Details. Provides a summary of your bids placed and messaging functionality for you to communicate with the Buyer.
- **Auction End Notifications:** Note that due to extension times, if there are multiple lots, each lot can have a different end time. Therefore if you receive a message that one lot has ended, check if other lots are still running.
- **Buyer Communication:** Check for any messages from the Buyer during the auction. If you are on the auction monitor page when the message is sent, a pop-up window will display the message. If not, the message will be displayed in the messages tab of the Auction Details section.

## 6. View your Contracts with Bupa

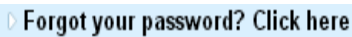
- **View all Contracts with Bupa:** If you have entered into a contract with Bupa, your relevant Bupa contact should store it on the GPT. To view this contract record select  from the Quick Links portlet. Select the Contract title to view details.
- **View Details:** From the left hand  menu under  view the contract details

- **View Attachments:** Under  click on the folder . If there is a number in the brackets there is a document visible for you to view.
- **View Attachments:** On the right hand side, ; If there is a further menu option , there may be a document in this folder for you to view.
- **Buyer Communication:** To communicate with the Buyer use the messaging functionality in the tool. Select  to send a message or view any messages the Buyer has sent to you.
- **Grant Colleagues Rights:** Select ,  to grant additional colleagues with rights to view the contract. Users must be registered. See section 3.2.

## 7. Help & Support

- **Helpdesk for 'how-to' Questions:** BravoSolution provide a 24/7 global helpdesk for Bupa's Suppliers. This should be the first point of contact for 'how-to' queries on using the tool.
  - Email [Bupa@BravoSolution.com](mailto:Bupa@BravoSolution.com)
  - Global contact phone numbers can be found [here](#)
 Please do not contact your Bupa contact for 'how-to' questions on using the tool. You will be directed to contact BravoSolution as the expertise from the Suppliers side lies with BravoSolution.
- **Help within the Tool:** Throughout the tool there are  buttons which provide further information
- **Buyer Communication:** When you are viewing a RFI, RFP, Auction or Contract, on the left hand menu there is a  option. Use this messaging functionality within the tool to communicate with the Buyer to clarify any detail on the RFI, RFP, Auction or Contract.

## 8. FAQ's

- **Forgotten password?** – Reset your password on the portal page by clicking 
- **Forgotten user name** you have registered with – contact BravoSolution helpdesk
- **'This company is already registered'** error message when registering– Someone has already registered this company with the same Company Registration Number. Ask them to add you as an additional colleague to the Supplier registration, see section 3.2. If you do not know who in your company has registered then contact BravoSolution helpdesk.
- **Register additional colleagues** to the Supplier registration – see section 3.2
- **Clarification to RFX questions** – use messaging functionality in tool to contact Buyer