

HPV PROCUREMENT PORTAL - SUPPLIER GUIDE

Assistance for Suppliers to use the HPV Procurement Portal

Before you begin

Technical Requirements

The minimum technical requirements for using the HPV Procurement Portal can be found on the HPV website in the following location:

<https://www.hpv.org.au/documents/details/175>

You will need to be signed in to access these files.

Site Security

Passwords must contain at least 8 characters.

If you have already registered but you have forgotten your password, click on the 'Forgot your password?' link to reset it.

Email alerts and replies will be sent from auto-alert@hpv.org.au.

Key terms

Certain key terms are used on the HPV Procurement Portal. They are:

Term	Description
RFQ	An RFQ in the portal is what HPV refers to as an Invitation to Supply (ITS)
RFx	An RFx refers to either an RFQ or RFI
Buyer	Buyer refers to HPV
Module	A section of the portal that are grouped together by what they do
Portlet	A box on the main dashboard that shows information and/or links to other functions within the portal

Messages

If you want to send a clarification question to HPV, use the secure messaging function. This is accessed from within the RFI/Q by selecting **Messages – Create Message** from the tab menu.

Messages sent to you will initially be displayed under the **New Messages** link on your dashboard. Once you have opened a message it will no longer be visible under the **New Messages** link, but will be relocated to the **Received Messages** link of the RFI/Q that it relates to.

Note: Messages are not the same as emails sent to you to alert you of actions on the portal.

Important to note:

If you are inactive on the site for more than **20 minutes**, you will need to sign in again and any unsaved data will be lost. A warning will be displayed on the screen after 15 minutes.

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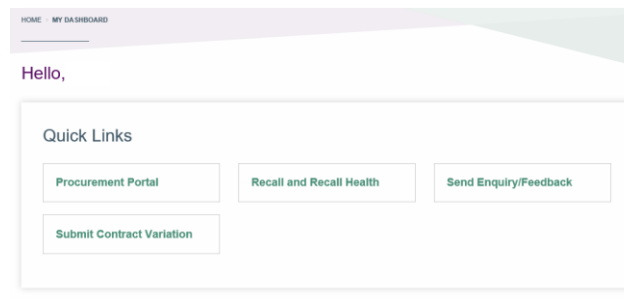
Navigating the portal

Accessing the HPV Procurement Portal


1. Browse to <https://www.hpv.org.au>.
2. Click **Sign In** and enter your **Email** and **Password** in the fields. If you have not registered on the HPV website before, click on the **Register** link and register your organisation.

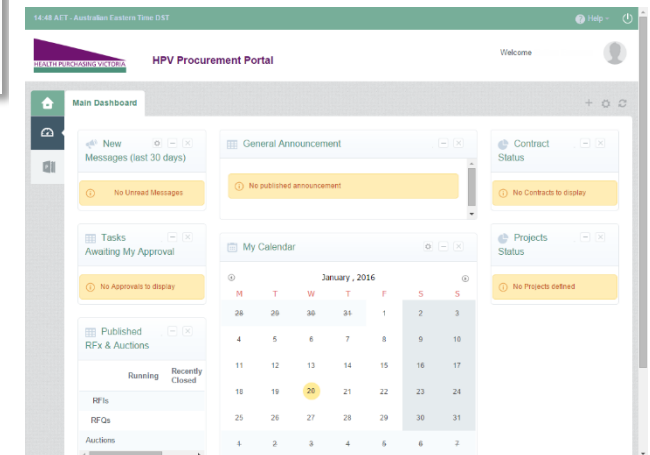


3. Once signed in, select **Procurement Portal** under the **Tools** option or the **HPV Procurement Portal** under the available Quicklinks menu on the main page.



Dashboard navigation

The HPV Procurement Portal opens on the **Main Dashboard** after you've logged in. The Main Dashboard gives you a quick overview of your activity on the portal and allows you to navigate directly to a particular module of the portal. The content and layout of the dashboard is customisable by clicking the  button.



Managing your organisation on the portal

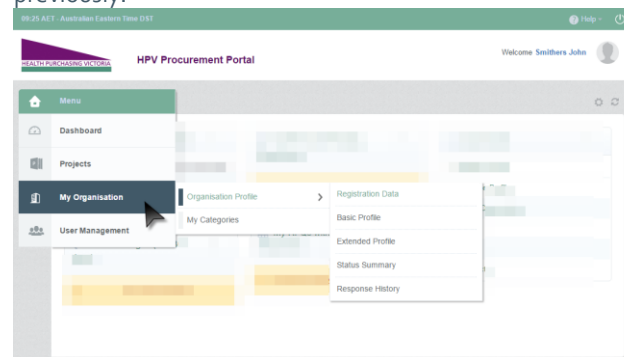
Important to note:

The person that registers the organisation automatically becomes the designated Super User and is responsible for managing the organisation's profile information and other user accounts.

This will dramatically reduce the time needed to respond to an RFX. Similarly, any profile information supplied as part of an RFX response will be fed back into your organisation's profile, making it available for any future responses.

Updating your organisation

1. Browse to the HPV Procurement Portal as explained previously.



2. Expand the **My Organisation** menu option and click on **Organisation Profile**.

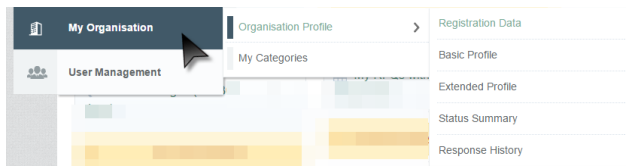
3. Complete your profile by supplying the answers under the **Basic Profile** and **Extended Profile** tabs. Each tab contains a summary of the completeness of your profile.

4. To edit the details click on each of the linked titles to view the questions for each section. Click on the **Edit** button to add the necessary details.

5. You can select the categories that you are interested in supplying on the **My Categories** menu option. This will ensure that you receive notifications when opportunities relating to that category are published.

My Organisation

When you click on the **My Organisation** link, the menu expands and the following options are displayed providing links to the different organisation information types.



Completing all of the questions in these profile sections will assist with the completion of RFXs, as information contained in your profile will automatically be added into the response section of the RFX when the same question is asked.

My Categories

HPV Invitations to Supply (RFX) are classified based on UNSPSC codes. In the **Categories** tab you can select categories that your organisation is interested in supplying.

If you have selected a category (or multiple categories), you will receive notifications when the Category Manager publishes a new/updated opportunity for that category. Notifications are issued by email, once a day in the morning.

If you don't select a category, you will still be able to see the published opportunities on your main dashboard.

1. To add Categories, expand the **My Organisation** menu option and click on **My Categories**. Click on **Add Category**.

2. Use the Free Text Search to find relevant categories. To select a category, select the corresponding checkbox.

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3. Click **Confirm Current Selection**.

Save your progress regularly, as the site might become inactive and you will need to sign in again losing any unsaved data.

Note: Only questions marked with an * is mandatory.

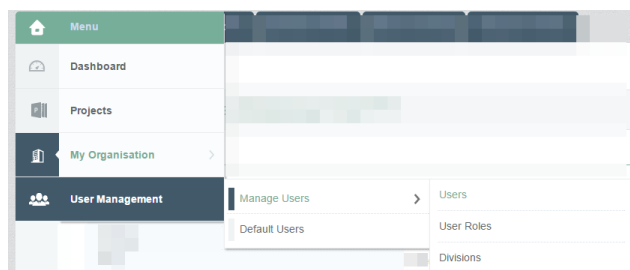
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User Management

The Super User is responsible for managing additional user accounts. User accounts can be assigned to different divisions and given different roles, which will determine the level of access the user has within the organisation's account.

Users can also be assigned to a particular RFX and will have to be assigned to an RFX to be able access the published opportunities for the RFX. The Super User account is the only account with access to all Published Opportunities. Multiple users can work on an RFX simultaneously.

1. Click the **User Management** menu.



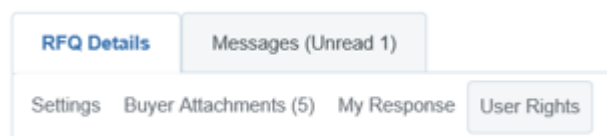
2. The expanded menu provides access to create divisions, roles and users.
3. Click **Users** to assign rights to users. Click on the relevant user.
4. Click on **User Rights** to edit the default rights of the user.
5. By default all the rights are defaulted to 'No'. Click on the **Edit** button to edit the rights. Once completed, click on the **Save** button.

System Generated Alerts

More than one User can receive system generated alerts. This can be done on a targeted basis or on a broad base where all alerts go to all parties.

For targeted alerts:

1. Under the menu User Management, Users, Users Rights, ensure the Messages Management for the specific event type (e.g. RFX) is set to 'Yes'.
2. After the RFX is accessed, add the additional User to the event via the User Rights tab. The additional User will receive all alerts related to that RFX.



- To ensure ALL message alerts to go more than one User:
1. Modify the SuperUser's User profile. The email address field will hold multiple addresses separated by ";" (semicolon).

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Responding to an RFX

1. Select either the RFI or RFQ from the **RFX Open to All Suppliers** section of the Main Dashboard.

	Currently Open	Next Closing Date
RFI	0	
RFQ	1	24/02/2016 12:00

2. Review the overview information and select the relevant RFX from the list, by clicking on the RFX title.

3. Click the **Express Interest** button. Make sure to download the Buyer attachments which provide details about the tender.


4. Select **My Response** from the side menu.

5. To automatically populate the content of your tender response, click on the **Create Response** button.

6. The tender questions are divided into three envelopes. A summary of remaining mandatory questions is summarised at the envelope level.

7. Click on the **Edit Response** button. This is required each time to access the questions for **each** envelope.

8. Some questions will include an attachment for you to download, complete, upload, and attach to your response.

These attachments can be accessed by clicking the  icon.

Note: Make sure to answer all the questions asked, on the screen as well as those asked in the downloaded attachments.

9. Save your work regularly using the **Save and Continue** button. You can save your response to complete later by clicking the **Save and Return** button.

10. When you have finished populating your tender response, make sure that you click on the **Submit Response** button to publish your response to HPV. Once this is done, you will receive an email confirming your submission.

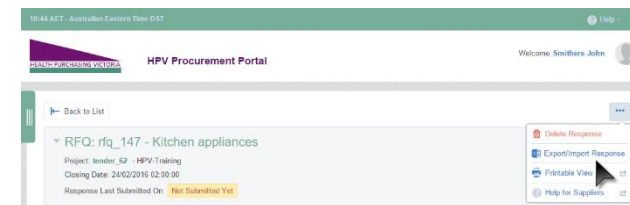
Note: You will be unable to submit a response if there any mandatory fields outstanding.

You can submit as many times as you like. The latest submission will always overwrite previous submissions. If a response is not open, it may be possible to submit a response late, but this response may not be accepted by HPV.

Exporting and Importing Responses

For some users it may be easier to complete the RFX responses offline in a template. This response can then be imported to the portal in bulk. Follow the steps below to export and import responses.

1. After you have clicked the **Create Response** button, click on the ellipse to expand the menu and click on the **Export / Import Response** link.



The import and download screen will open.

2. To export the template, select **Download**. Open the .xlsx file on your computer and complete the details. Make sure to save the file in the same .xlsx format.

3. To import the completed response, go back to the portal and select the relevant RFX. Use the above steps to browse to the import and download screen.

4. Click on the **Import Excel** button.

5. Select the relevant file using the **Choose File** option.

6. Click on the **Import Excel** button.

7. Once imported, save your changes.

Note: You will still need to review the questions and include any additional attachments required by the tender.