



Using the JAGGAER Advantage Procurement Portal

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Common terms

JAGGAER – the company who administers the JAGGAER Advantage Procurement Portal.

RFQ – Request for Quotation.

RFI – Request for Information.

RFX – Includes both RFI and RFQ.

Buyer – The Organisation who issues the Tender and awards the contract(s).

Seller – Suppliers who response to the Tender to sell their goods/services.

Support

Access & HSV website support:

If you are having issues accessing your HSV website login and browsing to the JAGGAER Advantage Procurement Portal, reach out to our Helpdesk team for assistance.

helpdesk@healthsharevic.org.au
(03) 9947 3900

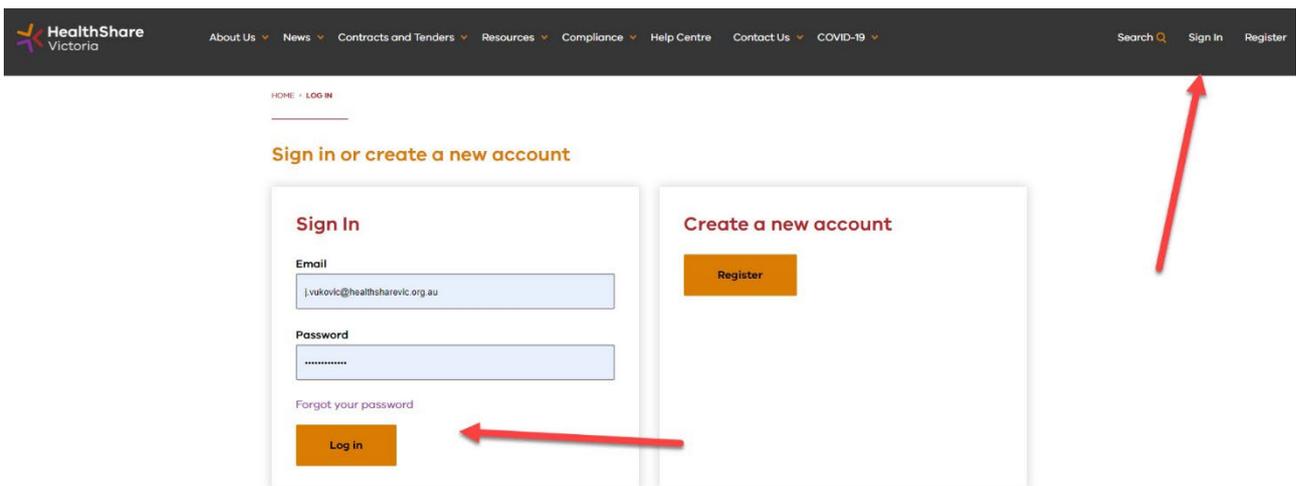
Technical Portal support:

If you need assistance with accessing information within the Portal, reach out to the JAGGAER Helpdesk.

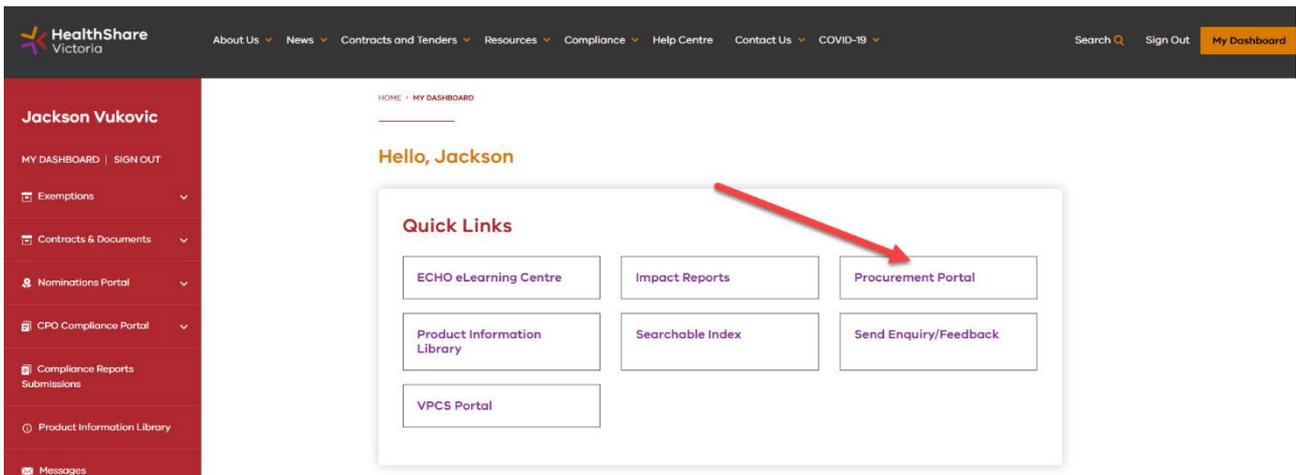
customersupport@jaggaer.com
(02) 8074 8627

Step 1 – Login to HSV website

1. Login to the HSV website with your email and password at <https://healthsharevic.org.au/>.

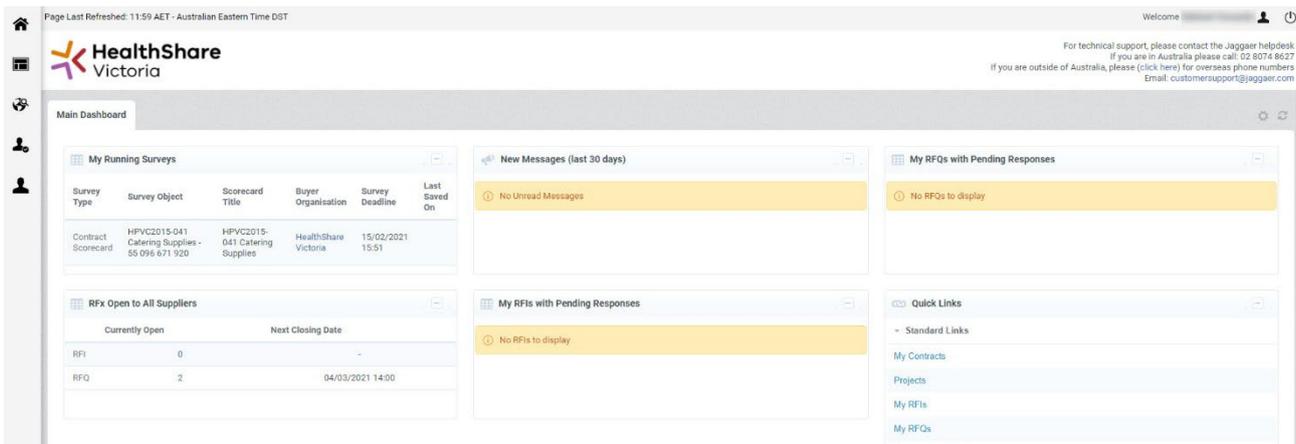


2. From the **My Dashboard** page, browse to access the **Procurement Portal**.



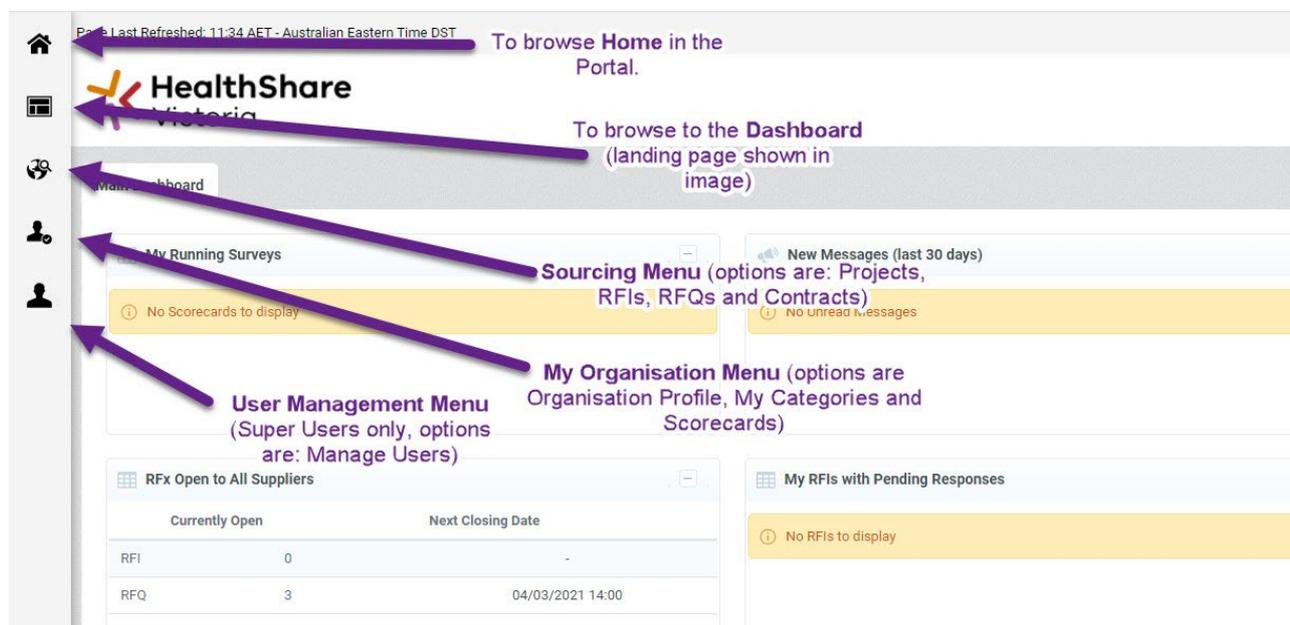
Step 2 – Loading the Portal

1. The JAGGAER Advantage Procurement Portal will open and load in a new browser window and will open access that is specific to your organisation.



Step 3 – Navigating the Portal

Dashboard navigation – left side menu



Left hand menu links & areas of the Portal:

Dashboard

Main Dashboard – to browse through to the Dashboard landing page.

Sourcing

Projects – the Tenders and Projects that your Organisation has been involved with.

RFIs – the RFIs that your Organisation has been involved with.

RFQs – the RFQs that your Organisation has been involved with.

Contracts – the successful past and current Contracts that your Organisation has held.

My Organisation

Organisation Profile

- **Registration Data** – the initial HSV website information for your Organisation.
- **History of Changes** – Change Log for your Organisation's account.
- **Basic Profile** – the basic information for your Organisation.
- **Extended Profile** – more in-depth information for your Organisation.
- **Status Summary** – summary showing status of Basic and Extended Profile completion for your Organisation.
- **Response** – History of your responses within the Portal.

My Categories – a list of product and service categories that you can add to your Organisation's account.

Scorecards

- **In Progress Surveys** – surveys that are currently open for your active Contract.
- **Enterprise Scorecards** – list of surveys that the Buyer may have for their organisation.
- **Contract Scorecards** – list of surveys for your active Contracts.

User Management

Manage Users

- **Users** – list of all Users in your Organisation (active and deactivated).
- **User Roles** – area not in use, **please do not use**.
- **Divisions** – area not in use, **please do not use**.
- **Default Users** – set a **'default user'** for areas of the Portal.

Dashboard navigation – centre quick links

The screenshot shows the HealthShare Victoria Main Dashboard. The dashboard is divided into several sections with annotations:

- My Running Surveys:** "Any Surveys that the Buyer has issued for your Contract." (Note: No Scorecards to display)
- New Messages (last 30 days):** "Any new Messages you have been sent from the Buyer (for an open Tender or your current Contract)" (Note: No Unread Messages)
- My RFQs with Pending Responses:** "Response to a RFQ/Tender that you have started but not yet submitted." (Note: No RFQs to display)
- RFI with Pending Responses:** "Response to an RFI that you have started but not yet submitted." (Note: No RFIs to display)
- RFI Open to All Suppliers:** "RFQs & RFIs open to all Suppliers to respond to." (Table shows 0 RFIs and 3 RFQs currently open, with a next closing date of 04/03/2021 14:00)
- Quick Links:** A list of standard links including My Contracts, Projects, My RFIs, My RFQs, Organisation Profile, and Custom Links.

Quick Links (on the bottom right hand side):

Standard Links

- **My Contracts** – all part and current successful Contracts for your Organisation.
- **Projects** – all Tenders and Projects that your Organisation has participated in.
- **My RFIs** – all RFIs that your Organisation has participated in.
- **My RFQs** – all RFQs that your Organisation has participated in.
- **Organisation Profile** – links through to the Basic and Extended Profile areas.

Custom Links – you can add specific links to areas of the Portal for your account.

Step 4 – Managing your Organisation on the Portal

Organisation Info - Basic Profile

After you have registered your Organisation on the HSV website and your account has been activated by the HSV Helpdesk, you can browse to the Procurement Portal and enter in all your organisation's information so you are prepared for upcoming tenders. As part of submitting a response to a tender you must complete the **Basic Profile** and **Extended Profile** sections.

The **Basic Profile** includes information such as:

- Business Trading Name
- Postal address
- Referees etc.

The screenshot shows the 'Basic Profile Details: Company_Information' form. It includes a 'Back to List' button and an 'Edit' button. The form is titled 'Company Details' and contains several fields with red error messages:

Company Details		
Registered Business Name	Registered Business Name	
Organisation Trading Name	Enter your Organisation's Trading Name	
Company Details	Please provide the organisation's postal address	
Company Details	Please provide your organisation's head office address	
Company Details	Please indicate whether your organisation operates on a multinational level?	No

Organisation Info - Extended Profile

Following the **Basic Profile**, you can complete the **Extended Profile**, which includes more in-depth information such as:

- Supply chain and operations
- Insurances
- Quality management etc.

Important note: The **Super User** of your Organisation will receive automatic email notifications as insurance certificates approach their expiry date.

The screenshot shows the 'Status Summary' tab of the Extended Profile. It displays a table with the following data:

Title	Supplier Data Status		Document Expiry Date (First to Expire)	Last Modified Date	Order
	Mandatory	Optional			
Additional Contact Details	●	●		23/12/2019 15:20	1
Contract Administration and Training	●	●		23/12/2019 15:20	2
Supply Chain and Operations	●	75%		21/03/2018 13:46	3
National Product Catalogue	●			19/03/2018 14:54	4
Quality Management	●	67%	31/03/2021	22/04/2020 08:10	5

My Categories

In preparation and upcoming tenders and to signal to Buyers in the Procurement Portal that your Organisation supplies in certain product or service categories you can create a list of My Categories to add to your Organisation Profile.

The list of categories uses **UNSPSC** numbers.

My Categories		
Code	Title	Classified On
1 14100000	Paper Materials	27/05/2015 10:54:26
2 47120000	Janitorial equipment	27/05/2015 10:54:26
3 47130000	Cleaning and janitorial supplies	27/05/2015 10:54:26
4 48100000	Institutional food services equipment	27/05/2015 10:54:26
5 50100000	Nuts and seeds	27/05/2015 10:54:26
6 50110000	Meat and poultry products	27/05/2015 10:54:26

Super User

Important note: The first person to register your Organisation on HSV's website will automatically become the **Super User** for both the HSV website and JAGGAER Advantage Procurement Portal. This person is responsible for managing all other user accounts as part of the Organisation as well as user rights, RFQ visibility for users and inducting new users to the Portal.

HSV website – there can be multiple Super Users.

JAGGAER Advantage Procurement Portal – there can only be one Super User at a time.

If your Organisation needs to change who the **Super User** is, please contact the HSV Helpdesk.

Managing Users

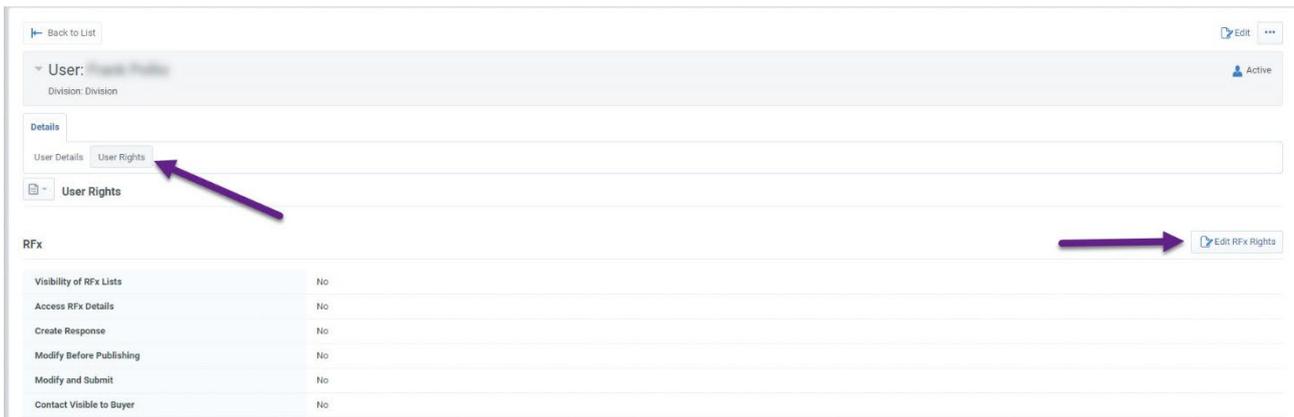
The Super User controls the user rights of each Sub User in the Organisation. By default new Sub Users do not have rights to access RFQs or Contracts and this must be granted by the Super User within the User Management area.

To manage the rights of a user, browse to: *User Management > Manage Users > Users > select the User who's rights you wish to update > click to open User Rights and update as needed.*

List of Users in your Organisation:

Users						
Go to		Filter By	Enter Filter (type to start search)			
Last Name	First Name	Division	Email	Telephone	Role	
1		Division		r/a		
2		Division				
3		Division				
4		Division		r/a		

Change the User Rights:



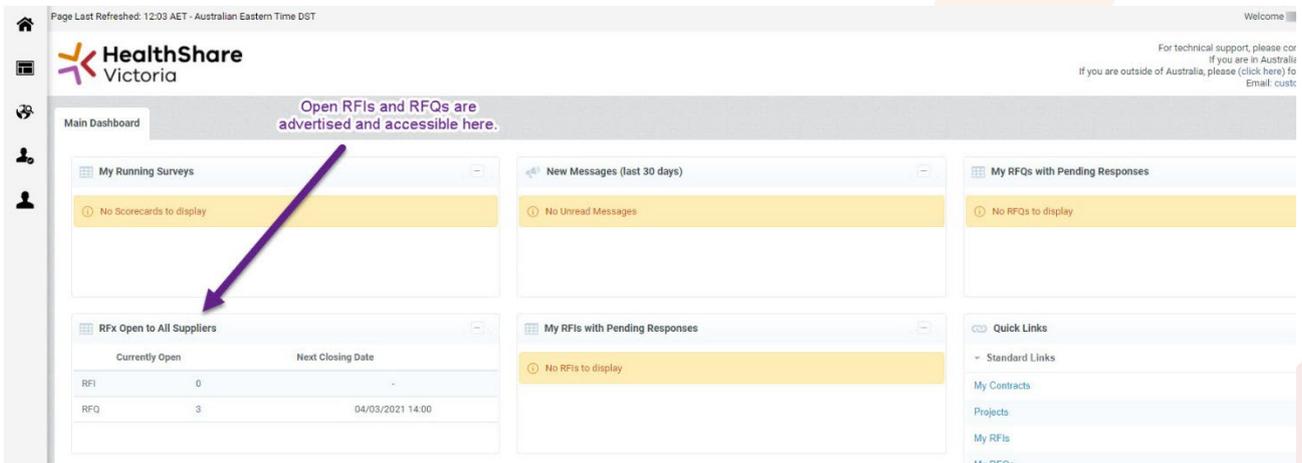
Creating a new User:

To have a new staff member assigned a User account they must register for a login to the HSV website. This will create a HSV website account for them which automatically sets up a JAGGAER Advantage Procurement Portal account as well that is linked to the HSV website account. Access to the Procurement Portal is via single-sign-on function from the HSV website only.

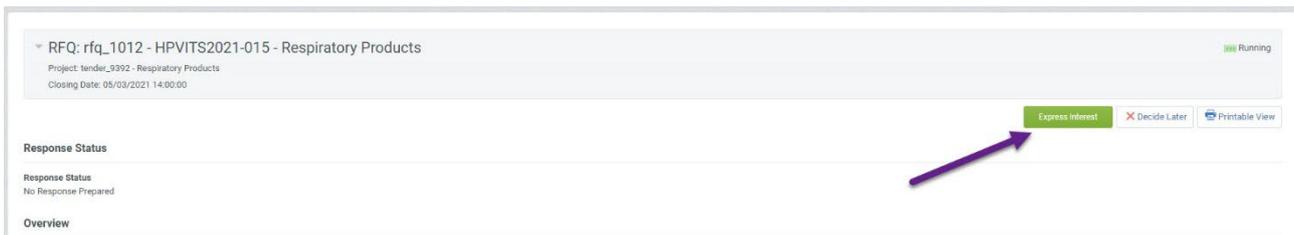
Step 5 – Responding to an RFX (RFQ or RFI)

Locating an RFQ/RFI

Buyers can issue an **RFI** and **RFQ** within the Portal asking for responses from Suppliers. Both RFIs and RFQs are opened and advertised within the **RFX Open to All Suppliers** section of the Dashboard.



Important note: to access the tender information you must first open the RFI or RFQ and click on 'Express Interest', following which you can view/download the information.



Submitting a response

Once you have accessed the Tender, read all information, and prepared your response you must ensure:

- All Mandatory Questions are completed.
- **DOUBLE CHECK** you have read all documentation.
- Ensure all necessary documents have been attached.
- Click the '**Submit Response**' button when ready.
- **DOUBLE CHECK** that you have submitted your response well before the closing date.

Submission issues

If you are experiencing issues when attempting to submit your response, please:

- **DOUBLE CHECK** all Mandatory Questions have been completed.
- Reach out to the JAGGAER Helpdesk for technical support.
- *Helpdesk phone number:* (02) 8074 8627
- *Helpdesk email:* customersupport@jaggaer.com
- **IMPORTANT NOTE** that you reach out for support well in advance of the closing date and time of the Tender.