ValueChain

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.
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.

UTH Health 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: Monday June 29, 2020 at 10:00AM CST
- 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.

Thank you,

UTH Health 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.
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:
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:

You must download the document, respond to the questions and save your document.
Repeat these steps with the remaining attachments:

1. **Respondent Questionnaire**
   - Download the Questionnaire, complete the form and upload your response here.

2. **Exhibit A - HUB Subcontracting Plan**
   - Upload your HUB Subcontracting Plan here if one is required for the bid.

3. **Exhibit B - Sample Agreement**
   - Review the UTHealth Agreement and mark up any requested changes if applicable.

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**Review the UTHealth Agreement**

**Mark up any requested changes if applicable.**
On the bottom left of the screen, there is a “Messages” box. Click this to open a window to send the Buyer a message.
Complete the Delivery Form to provide the number of days to deliver goods/services and to provide the Prompt Payment Discount if applicable:
Submit Pricing in the “Items and Lots” section of the event form by entering your line pricing under the “My Price” column:

<table>
<thead>
<tr>
<th>Name</th>
<th>Expected Qty</th>
<th>My Price</th>
<th>Price x Expected Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCT Data Center (UDC) - Application Enablement Services (AES) Geo Redundant - Calabrio (See attachment for more details).</td>
<td>1 (Each)</td>
<td>0.00 USD</td>
<td></td>
</tr>
<tr>
<td>AES - Secure E911</td>
<td>1 (Each)</td>
<td>0.00 USD</td>
<td></td>
</tr>
<tr>
<td>Avaya Experience Portal - Media Processing Platform</td>
<td>1 (Each)</td>
<td>0.00 USD</td>
<td></td>
</tr>
<tr>
<td>Aura Media Servers</td>
<td>2 (Each)</td>
<td>0.0 USD</td>
<td></td>
</tr>
<tr>
<td>Call Management System</td>
<td>1 (Each)</td>
<td>0.00 USD</td>
<td></td>
</tr>
</tbody>
</table>
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:
After completing pricing, click the “Submit Response to Buyer”:

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

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

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):
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.
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.
You must review the Shortlist Script attachment and provide a response to the questions in the Shortlist Scoring section, if applicable. Then hit Save.
Review the changes and check “I have reviewed the change to this event” box, and click the “Submit Response to Buyer” button.
Thank You!