![Xcel Energy logo]

Supplier Quick Reference Guide

Supplier's Quick Reference Guide
Introduction
Emptoris Sourcing is the Xcel Energy tool used to create and manage eSourcing events including RFI, RFQ, RFP and Auctions.

Key benefits to suppliers include: Improved visibility and governance, streamlined procurement processes, clear and accessible audit trails, reduced environmental impact.

This guide will show you how to:
- Review and Accept / Decline an RFP
- Create / Revise RFP Responses
- Place / Revise / Delete Individual Bids, Bulk Bids and Offline Bids
- Construct Bids Offline using a Bidding Template
- Create Messages and Reports

Log in
1. Access the website: https://xcelenergy-esourcing.emptoris.com
2. Enter the login ID and password provided by Xcel Energy

Key definitions
1. **RFP:** (Request for Proposal) Combines an RFI and RFQ. Used to gather qualifying information on Suppliers and to gather bids on desired items
   Discount Bid Types:
   (These options may be enabled by the host as appropriate)
2. **Bundle Bid**: You may be able to bundle items together in the RFP to offer a discount on them. This will vary depending on the structure of the RFP
3. **Volume Discount Bid**: You may be able to provide a discount based on the quantity of items awarded to your organization.
4. **Business Volume Discount**: You may be able to offer discounts based on the dollar amount awarded to your organization

Key definitions continued:
5. **Notification**: You will receive a notification any time the host makes a change to a scheduled date
6. **RFP Training / Computer-Based Training Modules (CBTs)**: Embedded in the eSourcing software are computer based training modules(CBT's) which will instruct you on how to successfully complete all stages of the bid
7. **Multi Text Response Type:** *Multi Text* responses are limited to 5,000 characters. For responses of over 5,000 characters, the response should be provided in the form of an attachment (attachments may be added at the response level and for each question at any time)

Review an RFP
This section takes the User through the process of Reviewing the RFP and indicating whether they will participate in the RFP.

1. From the **View RFx Bids** screen, click the **RFx Name** or **View/Respond to RFx**
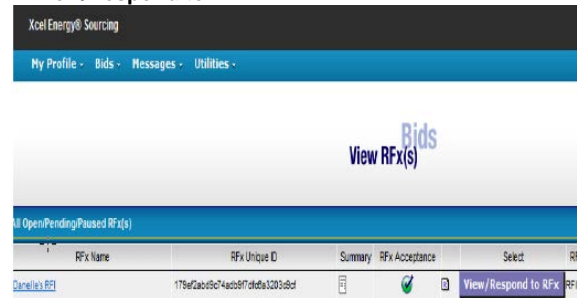
2. Click the Expand button (➕) for each questionnaire to view the questions within it.
3. Click the **RFx Attachments** link (📎)
4. Select the document by clicking the link under **Content**
5. To Review the RFP, select each of the line items listed under the **Single Bid** tab to view detail for that item (Lot, Quantity Required, Minimum Lead Time, etc.)
6. Once you have reviewed the RFP items and attachments, you will need to click **Accept** to participate in the RFP or **Decline** if you choose not to participate
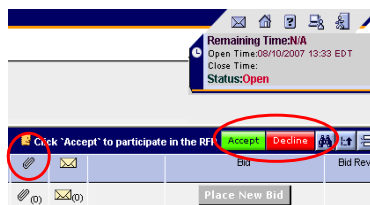

Note: Acceptance of this invitation is an acknowledgment of your participation; this acknowledgment will automatically propagate to other invited users within your organization. It is not necessary for them to accept this invitation.

Create / Revise RFP Responses
This section takes the User through the process of placing and/or revising responses to the questions in the RFP.
1. From the **Questionnaires** tab on the **RFP** screen, click **Place Response** to respond to questions in each questionnaire
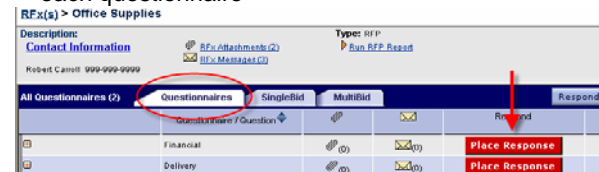
2. Place your responses in accordance with the specified question types (e.g., text, integer, decimal, selection, etc)
3. Click Save to submit your responses (for each questionnaire)
4. Once responses have been placed for a questionnaire, the **Place Response** button will be replaced with the **Revise Response** button
5. Use the **Revise Response** button to make edits to your response(s) (a notification will be sent to Xcel Energy any time a response is revised.
6. You can review and compare a history of your responses and attachments using the **View History** button adjacent to the **Revise Response** button
Note: It is important to make sure that you complete the RFP in the allotted time. Once the RFP has closed, you will no longer be able to bid or place responses

Place / Revise Individual Bids
This section takes the User through the process of placing and/or revising Bids in the RFP
1. To place bids on line items individually, select the **Place New Bid** button from the **Single Bid** tab. This will open the **Create Bids** window
2. Click the Item Information icon (▢) in the upper left to view the item description
3. Enter responses to each of the items requested (price per unit, delivery date, etc.) and click **Save** to commit your bid
4. Repeat the above process for the remaining items you wish to bid on.

5. You may revise any bid you have previously placed by using the **Revise Bids / History button** (while the RFP is open)
Important Note: When revising a bid, **DO NOT** use the **Place New Bid** button unless you want both bids to be considered by Xcel Energy. During analysis, the system will select the most appropriate bid from all that are present. If an error is realized after a bid has been submitted, modify the bid using the **Revise Bid** button (if the RFP is still open) or notify the RFP Host via Emptoris messaging, or other means such as e-mail, phone, etc., that the bid should be invalidated

Place / Revise Bids Using MultiBid
This section takes the User through the process of placing and/or revising Bids for multiple line items in the RFP simultaneously (from one screen)
1. To place bids on multiple line items, select the **MultiBid** tab and enter bidding information for each of the line items on which you wish to bid
2. When bids have been entered, click the **Save Bids** button to commit your bids
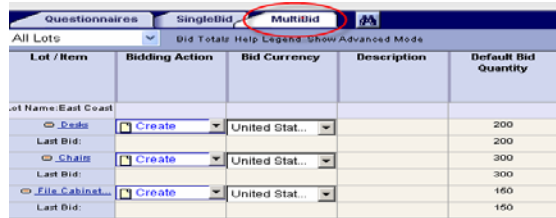
Place Bids Offline Using Bidding Template
This section takes the User through the process of placing initial Bids using an exported bidding template. Bids are provided within the template on your local system and then imported back into the system
1. Select **Respond Offline** and then select the **Download**

   Offline Response Template radio button
2. From the **Export Data** window, click **Export**

3. Wait a moment and then click the Refresh icon ( ) in the upper right of the **Data Manager** window
4. Right click on **Done-Click Here** and select **Save Target As** to save the export template locally, Open the template (.xls file) and bids in the Price per Unit cells that correspond to each line item. Save the file when done
5. Open the template (.xls file) and place bids in the Price per Unit cells that correspond to each line item. Save the file when done.
6. Select **Respond Offline** again from within Emptoris and select the **Import Responses** radio button

7. From the **Import Data** window, select **Browse** to locate and select the filled-in template on your local system

8. Wait a moment and then click the Refresh icon ( ) in the upper right of the **Data Manager** window
9. When the status changes to "Done", the import is complete

Delete a Bid
1. Click **View My Bids** to the right of the item
2. From the **View Bids** window, click the checkbox next to the bid to be deleted

3. Click the **Trash Can** icon ( )

Send a Message
Messages can be sent between buyer and suppliers during the event
1. To send a message, click the **RFP Messages** link
2. From the **View By RFx** window, click **Create.**
3. Select a **Recipient**, enter the subject and message text and click **Send**

Create an RFP Report
RFP Reports which detail your responses can be customized and exported out of the system to a spreadsheet for offline review
1. To create an RFP Report, click the **Run RFP Report** link
2. From the **Edit Report Parameters** window, customize the report and click **OK** to run the report
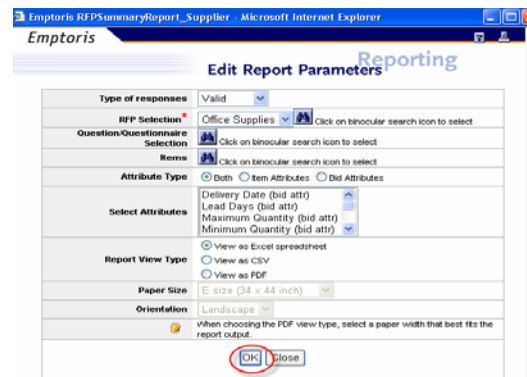
3. Click the **Export** button from the **Report** window and select the format for the exported report (Excel is recommended)
4. Click **Export** and save the exported report to your local system

Advanced Bidding Options

Emptoris v10 Sourcing RFx Supplier Response

This section provides an overview of possible advanced bidding methods that be or may not be enabled by the host for a particular RFP. If any of these options are enabled and you have questions on their use, please refer to the online self-help function in the application

Bundle Bid - A bid for a number of items in an RFP (rather than a separate bid for each item). Bundle bids are available only with RFPs and the buyer can choose to ignore them when performing analysis on returned bids. Mixing high- and low- margin items together, you can offer you "best price" while maintaining a sustainable margin
For example: You may combine Item A, which has a high profit margin, with Item X, a commodity with a low profit margin that is slow to move and offer a lower price for the "bundle" than would otherwise be paid for each item alone.
Note: Bundle Bids are placed only after you have placed bids on all items that you wish to include in a bundled bid

Volume Discount Bid - A quote or bid in which you, the supplier, specify quantity ranges, each with a bid price.
For example: The Buyer purchases 500 units at a price per unit (PPU) of $90. You may choose to offer the following discounts for purchases in these quantities:
501-600 units purchased PPU $80.00
601-700 units purchased PPU $70.00
701-800 units purchased PPU $60.00

Business Volume Discount - A Business Volume Discount (BVD) permits you to specify discounts for different awards that exceed particular currency thresholds. BVDs can be defined for one or more categories. Discounts can be expressed as percents or currency amounts, and can be positive or negative. You can have one or more BVDs in effect at any given time.
For example: The Buyer is prepared to spend $500,000 on a project. The Supplier offers a discount of 3% on any purchase amount over $500,000, a 5% discount on any purchase amount over $510,000, etc.
Note: None of these discount bids can be entered until a simple bid has been submitted

Accessing Assistance:
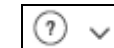
1. Select the Tutorials or Help options in the upper right corner of the application
2. These options will take the user to the IBM "Knowledge Center" where you may access additional information or search for specific topics.