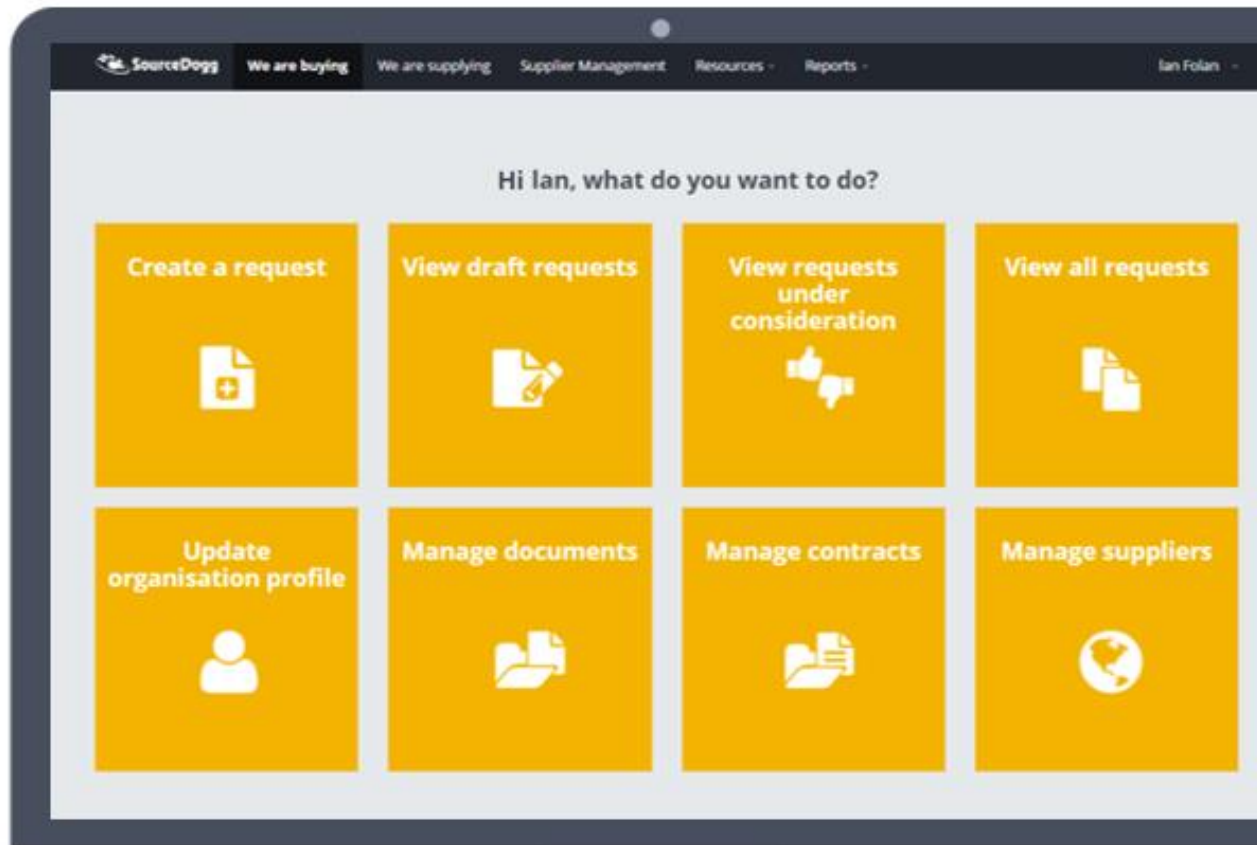




# SourceDogg

## Creating Requests on SourceDogg

Date: 26<sup>th</sup> October 2017



## Table of Contents

Create a Request .....	3
Templates .....	3
Existing Requests list .....	4
New Blank Request .....	6
Request Details .....	6
Request Settings .....	9
Publication Settings .....	10
Content.....	12
Section .....	12
Body of Text .....	14
Items .....	15
Questions .....	20
Guard questions.....	37
Order .....	41
Auto-tagging and Custom Field updates .....	47
Custom field creation and preparation.....	47
Auto-update set up in the request .....	48
Automatic tagging.....	49
Suppliers.....	50
Add suppliers via email .....	51
Invite from Directory.....	53
Remove a supplier .....	57
Change contact .....	57
Notes .....	58
Submit for Approval .....	59
Approval, Summary & Status .....	59
Approver notified.....	60
Approve / Reject .....	61
Publish.....	61

## Create a Request

To create a Request in SourceDogg, click on the 'Create a Request' Tile on the Homepage. A Request can either be created as New or from a Template Request that has been created previously.

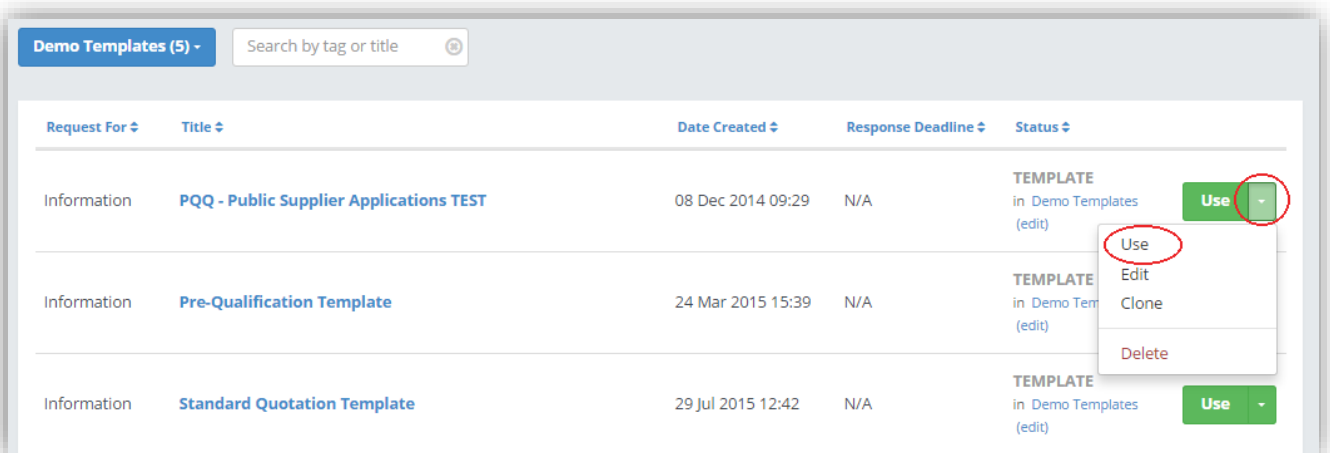
### Templates

Once templates are selected in SourceDogg, this navigates to the template library, where all Request Templates are available to you.

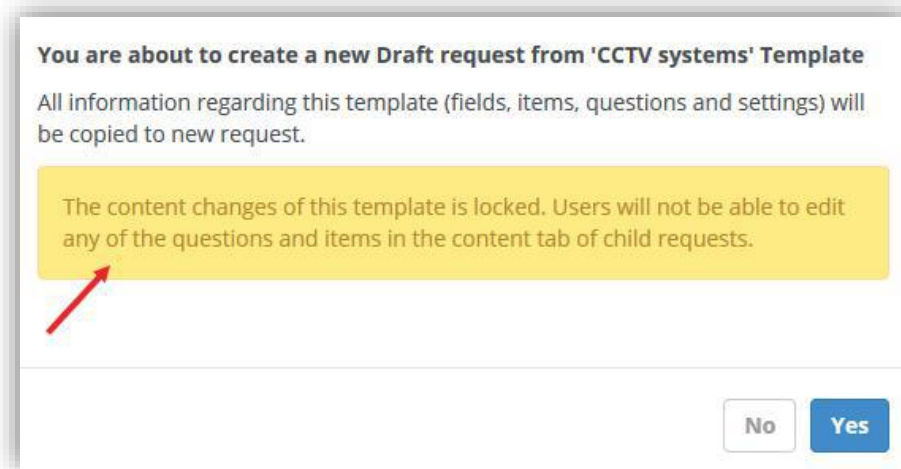
### Create a Request

Fill in fields below to begin the process of creating a request. You can also create a request from one of the [templates](#) available to you.

To Use a Template, select 'Use' and select either 'Use', 'Edit', 'Clone' or 'Delete'



- Use: This will then generate the template into a Request that can be edited. All areas of the Request will be covered in the New Black Request Section below. It is possible the content of the template will be locked by your administrator. If that happens, the following message will be displayed when you create a request from the template



- Edit: This allows the template settings or content to be edited.
- Clone: This clones the template. A clone is a direct copy of the request or template in question.
- Delete: This will delete the template from SourceDogg.

Important to note:

The templates can be managed in 'Expert Packs' (found under the Resources Tab on the toolbar). Experts Packs allow the storage of Request/Survey/Document and Report Templates. These will be explored in more detail in Expert Pack Section of the User Guide.

### Existing Requests list

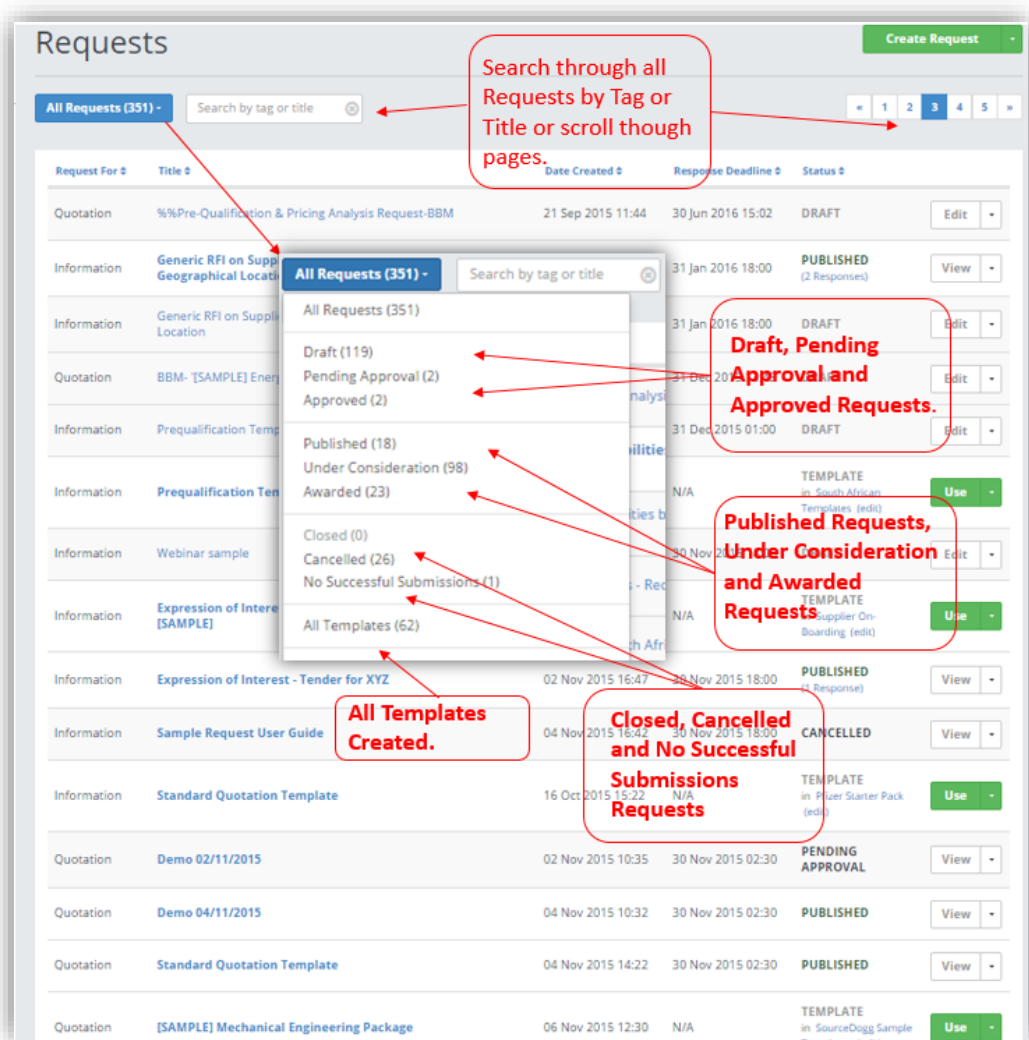
When in View all Request tile, all requests are listed. If your user permissions are 'Editor' or lower, you can only see the requests where you are added to the request as a team member. If you have approver or admin level access, you will be able to see all the requests created in the account.

By clicking on the blue button on the left hand corner of the screen, you can filter down the requests by their status. SourceDogg categorizes request into following sections:

- Draft - these are request currently being created, users can make any changes required
- Pending Approval - requests sent for approval to designated users. During this stage no further changes can be made until the request is approved for publishing or rejected by the approver user
- Approved - requests that have been approved for publishing. Users can publish these online.
- Published - requests published online, suppliers have been invited and may have started answering the questions and price the items. Buyers are able to invite further suppliers, add team members or extend the deadline for request.

- Under Consideration - the deadline for the request has passed. Buyers can review / score the responses from suppliers, evaluate and analyse the submissions. Suppliers at this stage are not able to edit their responses.
- Awarded - all submissions were either declined or awarded by the Buyer.
- Closed - Request was closed by the Buyer before being published
- Cancelled - Request was cancelled by the Buyer after it was published
- No Successful Submissions - All responses provided by the suppliers were declined by the Buyer.

It is also possible to filter the requests based on their type, you can select between Request for



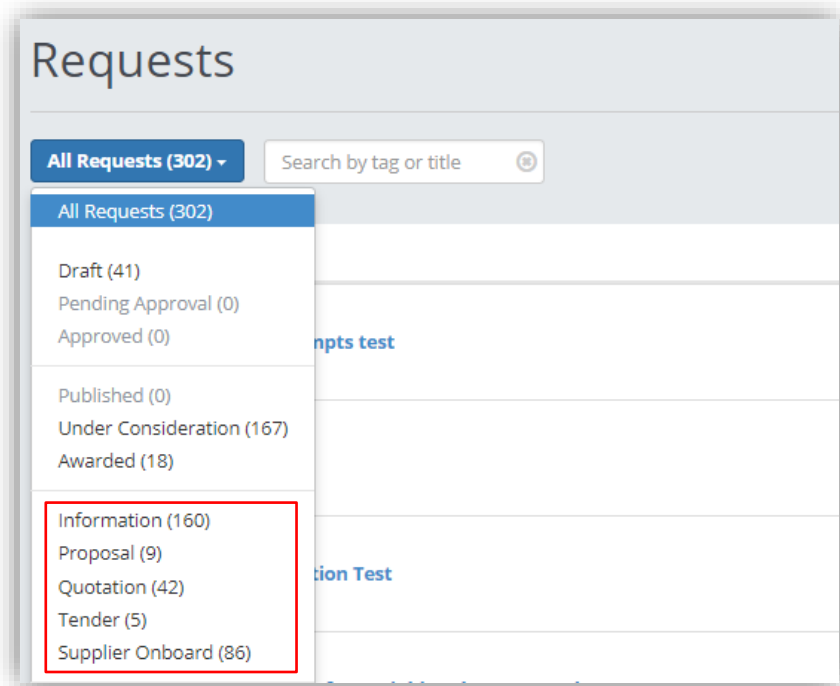
The screenshot shows the 'Requests' dashboard with a filter dropdown menu open. The filter menu lists various request types and their counts:

- All Requests (351)
- Draft (119)
- Pending Approval (2)
- Approved (2)
- Published (18)
- Under Consideration (98)
- Awarded (23)
- Closed (0)
- Cancelled (26)
- No Successful Submissions (1)
- All Templates (62)

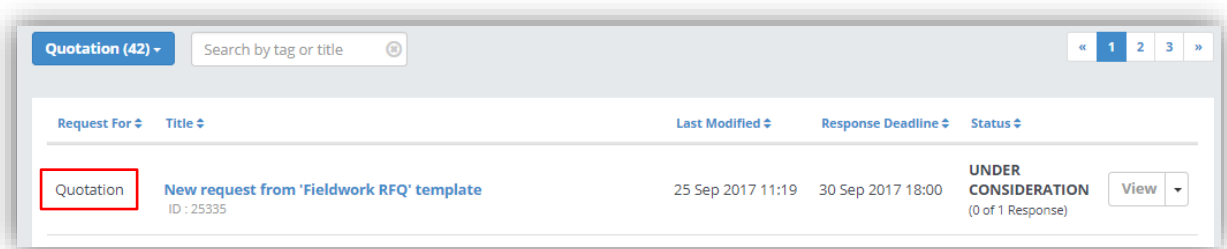
Annotations on the screenshot explain the filter options:

- Search through all Requests by Tag or Title or scroll through pages.** (Points to the search bar and pagination controls)
- Draft, Pending Approval and Approved Requests.** (Points to the Draft, Pending Approval, and Approved categories)
- Published Requests, Under Consideration and Awarded Requests.** (Points to the Published, Under Consideration, and Awarded categories)
- All Templates Created.** (Points to the All Templates category)
- Closed, Cancelled and No Successful Submissions Requests.** (Points to the Closed, Cancelled, and No Successful Submissions categories)

Information, Quotation, Proposal, Tender or the Supplier On-board request type.



On the example below the requests are filtered down to Request for Quotation



## New Blank Request

### Request Details

To begin the Process of creating a new Request, the request Settings Page must be completed in its entirety. Please see the screen below with what the request settings page looks like. Explanations of each heading are below.

## Create a Request

Fill in fields below to begin the process of creating a request. You can also create a request from one of the [templates](#) available to you.

Request Details

**Title \***

1

Assist suppliers with a concise title mentioning the type of goods or services you seek

**Request for... \*** **Currency**

Information 2

Euro EUR (€) 3

**Response Deadline \*** **Expected Decision Date**

4

5

Deadline is extendable at any time until the request is awarded or cancelled Let suppliers know when you expect to have your decision made

**Description**

6

A detailed description helps suppliers assess their suitability and increases the searchability of a public request.

**Tags**

e.g. Building Maintenance 7

This request has not been tagged yet

1. **Title:** Assist suppliers with a concise title mentioning the type of goods or services you seek.
2. **Request For...:** Choose between Information, Proposal, Quotation or Tender, and Supplier Onboard request types
3. **Currency:** Select the relevant Currency.
4. **Response Deadline:** Select a date and time using the Calendar feature. This is the date after which the responses will no longer be accepted.

5. **Expected Decision Date:** Let suppliers know when you expect to have your decision made. This is an optional field.
6. **Description:** A detailed description helps suppliers assess their suitability and increases the searchability of a public request.
7. **Tags:** This is an internal field at which the User can enter tags. Tags are a way of categorising and labeling different areas of SourceDogg. Here tags such as Construction, Project Number, Building Maintenance etc.. can be used.
8. **Custom Field:** Custom Fields, such as below, can be added to a Request from the Settings (Advanced)). These fields allow an organisation to capture any unique operational metrics.

**Project Number**

**Business Unit / Plant / Office / Location**

**Award Approved by: (Required for Award)**

**Request Team**

NAME	TEAM ROLE	REVIEWER	SEE PRICES
<b>DF</b> Ian Folan (Creator) Category Manager XYZ	Approver	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>ET</b> Evaluation Team 8 Users	Approver	<input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>
<b>AB</b> Alison Baker Job title not specified	Reader	<input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>

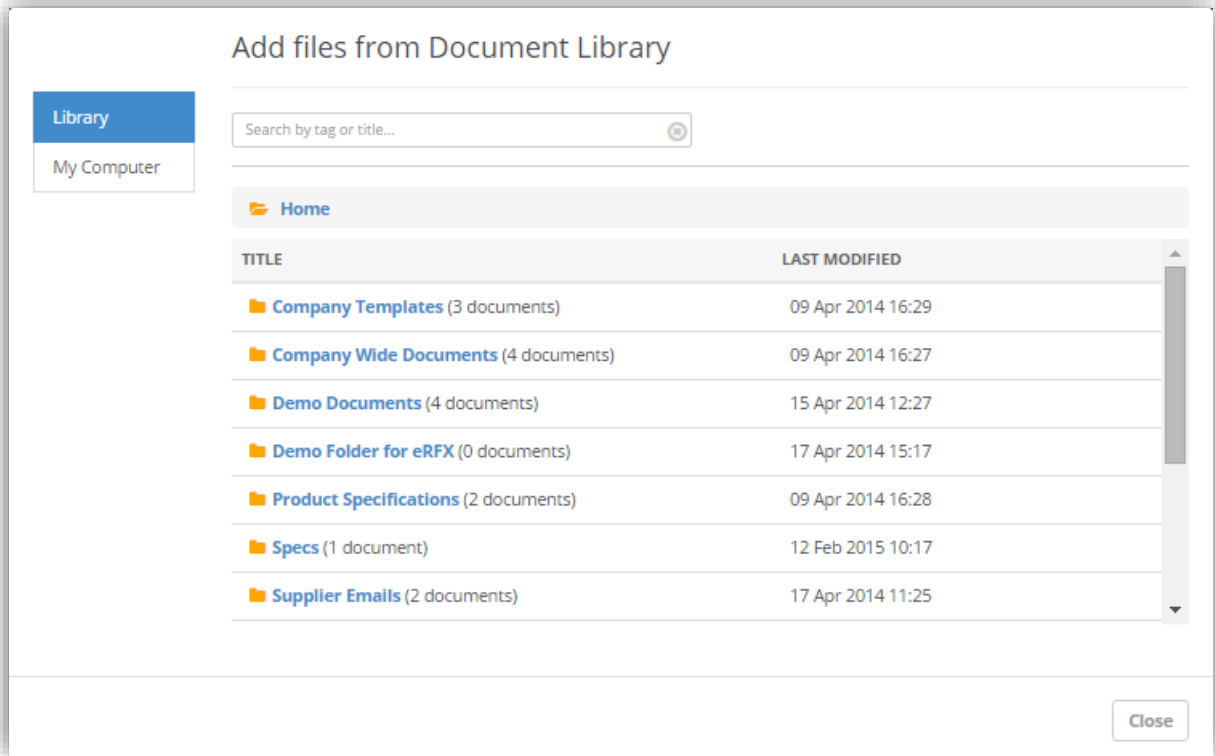
Show Effective Permissions

<b>BM</b> Bill Messenger Finance	Admin
<b>BW</b> Bruce Wayne Quality Assurance	Reader
<b>CP</b> Caroline Parker Category Stakeholder	Reader

9. **Request Team:** this is where Users and User Groups can be added into a request.
10. **Attach Documents:** Attach any supporting documents or videos that suppliers need to view or will assist them with their response. There are two ways of attaching these files. Once you



click on the Attach Documents button you can either attach from the Documents Manager within SourceDogg or from 'My Computer'.



## Request Settings

Please see "Settings" for more general information on Request Settings. In each request, you can switch these settings on or off, depending on how they are set up initially. The settings available are as follows:

- **Approval Requirements:** Select Approval Requirement so that a request requires approval from a user with Approver status before it can be published. This setting facilitates oversight of your organisation's sourcing process. Users Approval levels be set in the User Settings
- **Response Lock:** Select Response Lock (Sealed Bid) so that no one in your organisation can view a supplier response until the Response Deadline has passed. This setting contributes to an objective and impartial sourcing process.
- **Score System:** Select Score System to add weights to your questions and score the answers provided by suppliers. This setting facilitates an effective and quick evaluation of responses.

- **Supplier Q&A:** Select Supplier Q&A to allow participating suppliers to post questions regarding the request. All supplier questions and your answers are private. This setting also allows announcements of any changes or clarifications to all participating suppliers.
  - **Public Supplier Q&A:** Select Public Supplier Q&A to activate public Q&A message board. Any message posted here by either supplier or buying organisation will be visible to all suppliers invited. All supplier questions and answers will be public and the supplier name and contact name will be anonymized.

**Supplier Q&A**  
 Select Supplier Q&A to allow participating suppliers to post questions regarding the request. All supplier questions and your answers are private. This setting also allows announcements of any changes or clarifications to all participating suppliers.

**Public Supplier Q&A**  
 Select this option if you want to activate the Public Q&A message board. All supplier questions and answers will be public and the supplier name and contact name will be anonymized. This setting also allows announcements of any changes or clarifications to all participating suppliers.

## Publication Settings

Here is where the method to publicise this request is defined.


**Publication Settings**  
 Select methods to publicise this request.

**Open Request (Any Supplier Can Join)**  
 When selected this request will be available to suppliers you directly invite and suppliers who access the Request link via one of the publication means below or via some other method (such as a manual email). If un-selected only invited suppliers will be able to view your request and submit a response.

**SourceDogg Public Request List**  
 Publish this request to the SourceDogg public list.


- **Open Request (Any Supplier Can Join):** When selected, this request will be available to suppliers you directly invite and suppliers who access the Request link via one of the publication means below, or via some other method (such as a manual email). If unselected only invited suppliers will be able to view your request and submit a response.
  - **SourceDogg Public Request List:** Publish this request to the SourceDogg public list.

**Important to note:** The 'Save Details' button on the right-hand side of the page Request Detail page must be clicked to Save before progressing to the Content section, or after any change is made.



**TED**  
 Publish this request on the OJEU TED Service  
 Checking this will create a draft Notice in the [Notices](#) section on SourceDogg.  
 The Request will not be published to TED when publishing the request.  
 The settings must be configured and the draft notice must be published in the [Notices](#) section of SourceDogg.


---



**Contracts Finder**  
 Publish this request on the UK Contract Finder Service  
 Checking this will create a draft Notice in the [Notices](#) section on SourceDogg.  
 The Request will not be published to Contracts Finder when publishing the request.  
 The settings must be configured and the draft notice must be published in the [Notices](#) section of SourceDogg.

You can also define here if you want your RFX to be published on OJEU TED or Contracts Finder websites, which fulfills the public procurement rules when procuring products or services over a certain value.

When any of these options is selected after the request is published the system also creates the draft notice and creates a link to this draft.



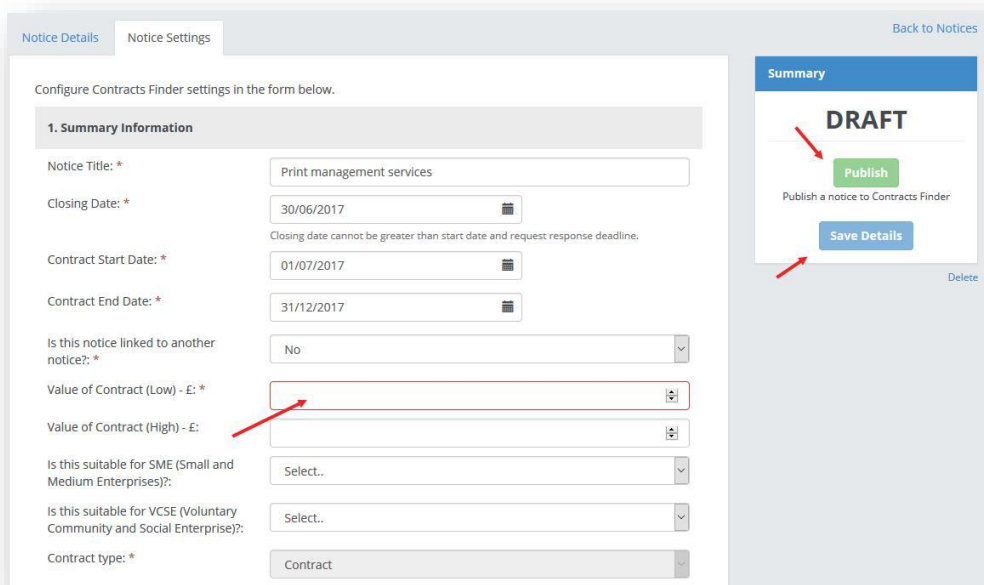
**Contracts Finder**  
 Publish this request on the UK Contract Finder Service  
 Checking this will create a draft Notice in the [Notices](#) section on SourceDogg.  
 The Request will not be published to Contracts Finder when publishing the request.  
 The settings must be configured and the draft notice must be published in the [Notices](#) section of SourceDogg.

[Link to Notice](#) ←

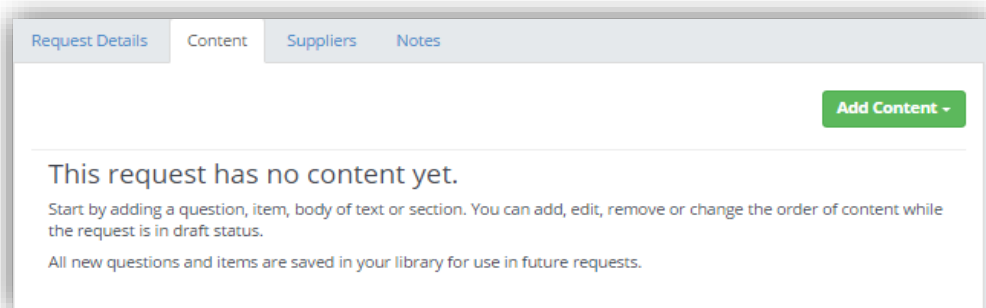
[Link to Contracts Finder](#) ←

When accessing the draft notice, you must fill all the required information (the mandatory fields are red-coloured) and save and publish the notice. Once the notice is published this creates a link to the notice in the Request Details page. (In case of TED notices this can take up to 24 hours)

**NOTE:** For detailed user guide on how to create various types of notices and publish them online please contact Customer Service at [customerservice@sourcedogg.com](mailto:customerservice@sourcedogg.com)



## Content

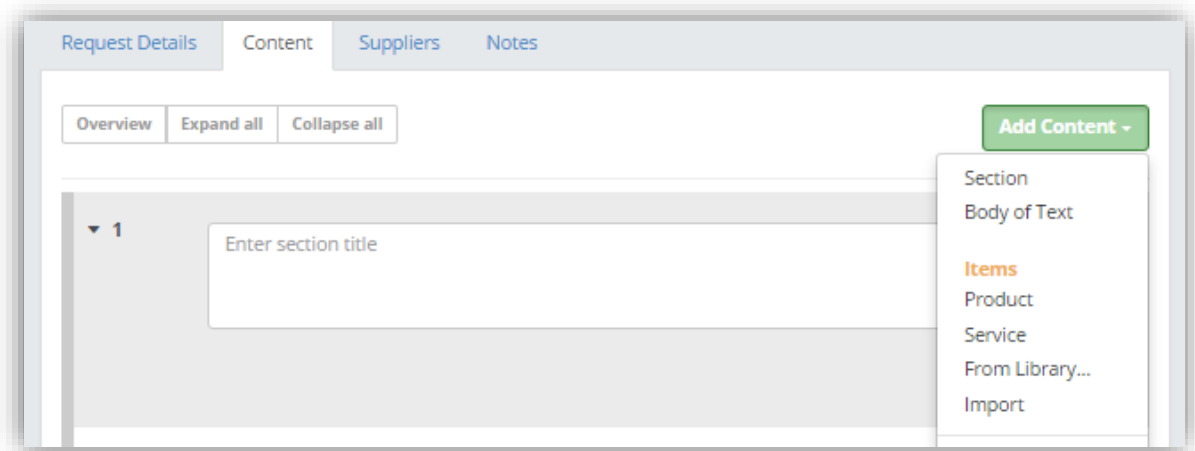


The Content of a request is where all the information needed from Supplier is collected. This is done by asking a variety of question types. Information such as Certificates, Contact Details, Files, Product & Service pricing and much more can be gathered here.

Content will be broken into the following sections: Section, Body of Text, Items, Questions, Order.

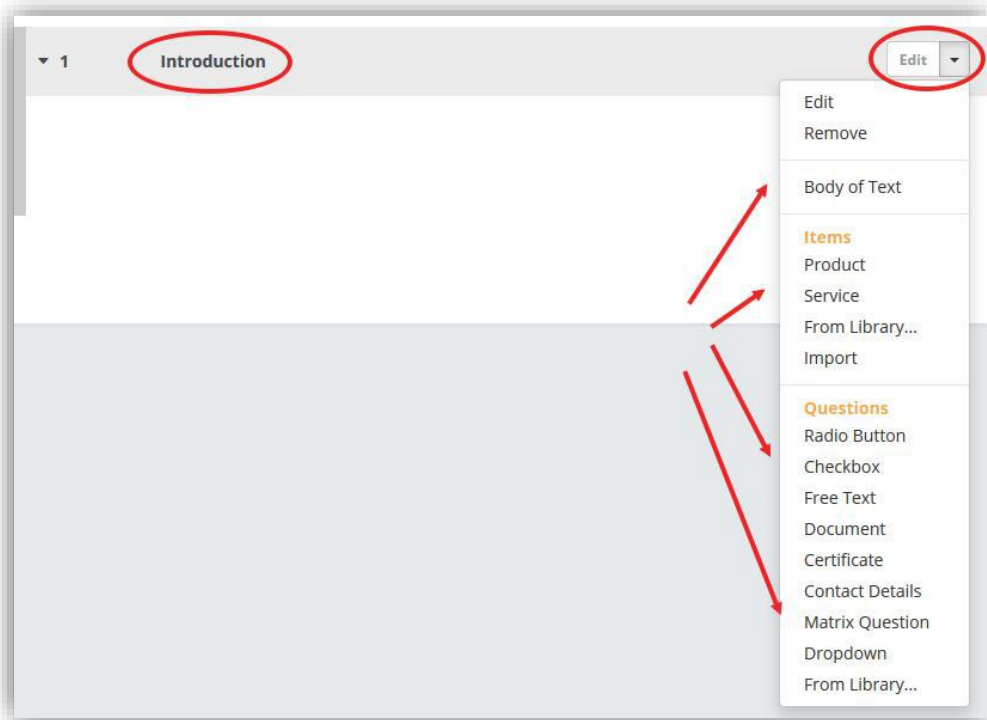
### Section

The importance of creating a section in SourceDogg is to Link together Questions/Items and Body of Text under a general heading.



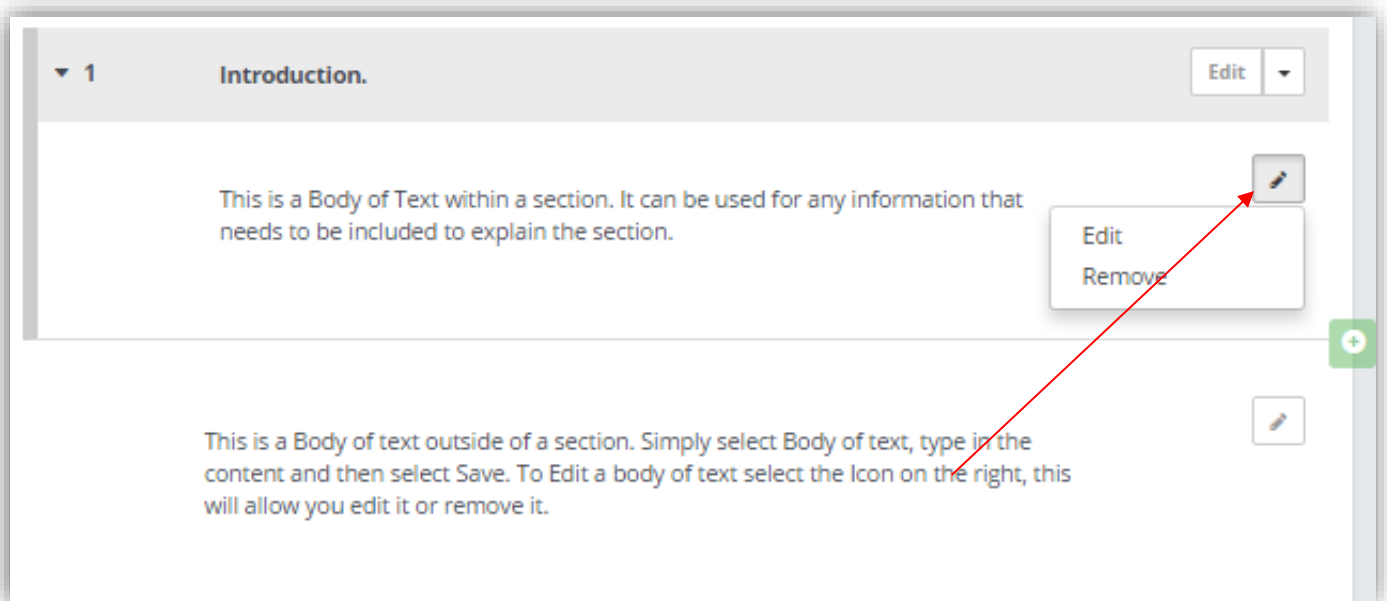
To add a Section to a Blank Request, click 'Add Content' and select 'Section'.

Enter your Section name and Save. Once this is done, click the 'Edit button'. This will allow you to Edit the Section name, add a Body of Text and add other content to this section.



## Body of Text

A Body of Text is simply a statement or paragraph that can be entered into the content of a Request. The body of Text does not have an answering field and can be used to input information in Sections or as standalone.



**Important to note:** As Content is built on SourceDogg a Green Square with a + symbol will appear. This is the shortcut to add content from that point in the request. It gives the same drop down menu as the 'Add Content' button at the top of the Content section.

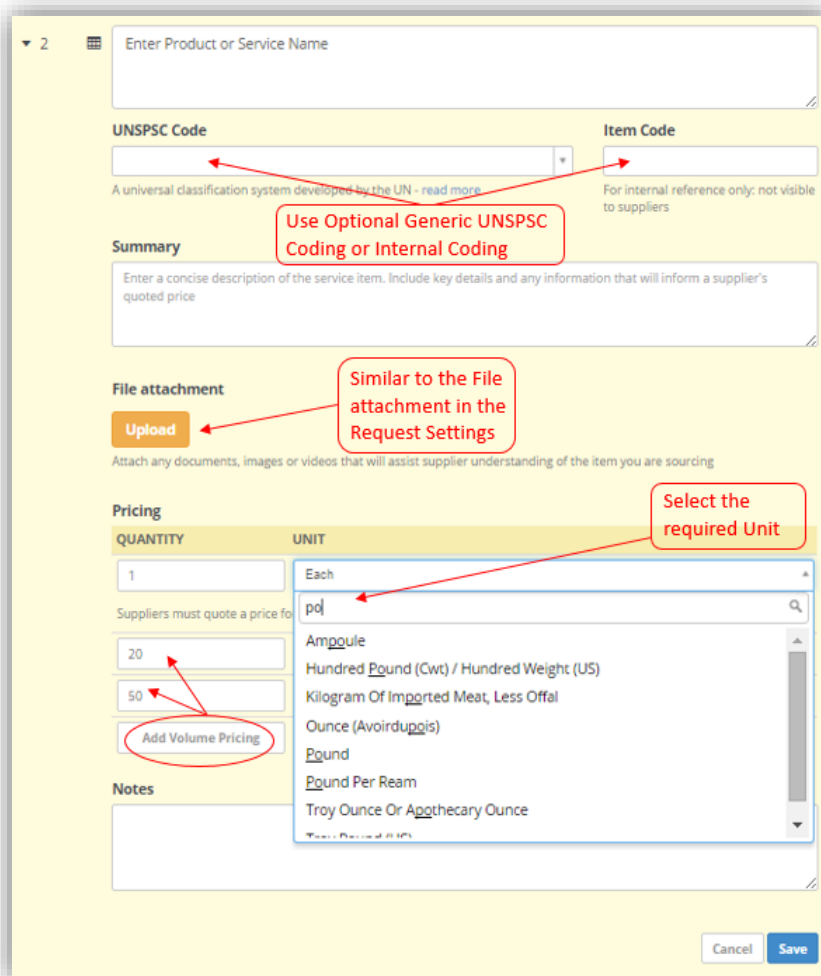
### Items

The Items is where Products and Services are added into the request. This can be done by:

- The Product/Service can be created as new;
- Use the Library, where all Products/Services that have previously been created are stored;
- Duplicate items;
- Import the Products & Services from an Excel template.

### Product/Service Question

To create a new Product or Service, select the option in the dropdown from the 'Add Content'. Product and Service are very similar in their creation. Select either Product or Service and the Item Creation fields for will appear. See below for an explanation of these fields.



The screenshot shows the 'Enter Product or Service Name' form with several fields and callouts:

- UNSPSC Code:** A dropdown menu with a callout: "Use Optional Generic UNSPSC Coding or Internal Coding". Below it is the text: "A universal classification system developed by the UN - read more".
- Item Code:** A text input field with a callout: "For internal reference only; not visible to suppliers".
- Summary:** A text area with the instruction: "Enter a concise description of the service item. Include key details and any information that will inform a supplier's quoted price".
- File attachment:** An "Upload" button with a callout: "Similar to the File attachment in the Request Settings". Below it is the text: "Attach any documents, images or videos that will assist supplier understanding of the item you are sourcing".
- Pricing:** A section with a table:
 

QUANTITY	UNIT
1	Each

 Below the table is a search bar with "pd" entered. A callout: "Select the required Unit" points to the dropdown menu. Other units listed include: Ampoule, Hundred Pound (Cwt) / Hundred Weight (US), Kilogram Of Imported Meat, Less Offal, Ounce (Avoirdupois), Pound, Pound Per Ream, Troy Ounce Or Apothecary Ounce, and Troy Pound (AP).
- Quantity:** Input fields for 20 and 50, with a callout: "Add Volume Pricing".
- Notes:** A text area at the bottom.

UNSPSC- United Nations Standard Products and Service Code- more information can be found [here](#).

Once all the information is completed in a Product or Service, it is stored in the Item Library. The next screen grab shows the completed Item. Note the Multiple uploaded files, the multiple quantities, codes, and notes.

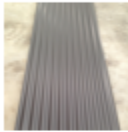

▼ 2
☰ **Corrugated Roofing Iron sheets**
✎

UNSPSC: 30265400 Iron sheets | Item Code: FG2G22/1

---

Sheet cover width: 762 mm

BMT .042

QUANTITY	PRICE PER PALLET (LIFT)	TOTAL - EUR (€)	DISCOUNT
1	€ <input style="width: 100px;" type="text"/>	---	---
20	€ <input style="width: 100px;" type="text"/>	---	---
40	€ <input style="width: 100px;" type="text"/>	---	---

**Notes:** This is the Notes field where any other information that is relevant to this specific item can be captured.

### Items Library

By using the Item Library, there is complete access to all Products/Services that have previously been created in other Requests. This is an extremely useful and time-saving area of SourceDogg as multiple items can be added at the same time.

To access the Item Library, select 'From Library...' in the 'Add Content' drop down menu. Use the Search bar at the top of the Library to search through item Names or Codes. Page numbers are also on the top right which enables scrolling through all of the items in the library.



**Add Items from Library**

Search for previously created items

Enter item or item code 692 items found

ITEM	ITEM CODE	NUMBER OF REQUESTS	
Enter item name here		0	Add
High Visibility Jackets	H1V1s	2	Add as duplicate
Evolution Safety Hard Hat	JSP EVO8	2	Add
Corrugated Roofing Iron sheets	FG2G22/1	2	Add
Steel Bar	[U98028-15]	2	Add
Aluminium sheet metal	SH3245/3	2	Add
Hydrated Lime	4557gp:4	1	Added
Fujitsu tp3k xl 1.3 GHX Celeron 512mb 40GB HDD - TeamPoS 3000 XL Till Store in a box		1	Add

Add as duplicate (to edit) or add 'as is' into the Request.

Close

When adding an item from the library, by clicking 'Add' this will add this item to the content of the Request but it cannot be edited once added. Multiple items can be selected to add.

### Duplicate

The purpose of duplication in SourceDogg is to enable the User to quickly copy items/questions and edit them. As explained above when an item is added from the library it cannot be edited, however, if 'Add as duplicate' is selected, this will add the item to the content but will allow any of the items information to be edited.

Duplication is also possible from

Hydrated Lime

UNSPSC: 30111604 Hydrated lime | Item Code: 4557gp:4


- Cas no.:1305-62-0
- Purity:offwhite graules
- Conent 95% min /98% min
- 25kgs per bag or 900kg/ Jumbo Bag.

QUANTITY	PRICE PER EACH	TOTAL - EUR (€)	DISCOUNT
1	€	---	---

Edit  
Duplicate  
Remove

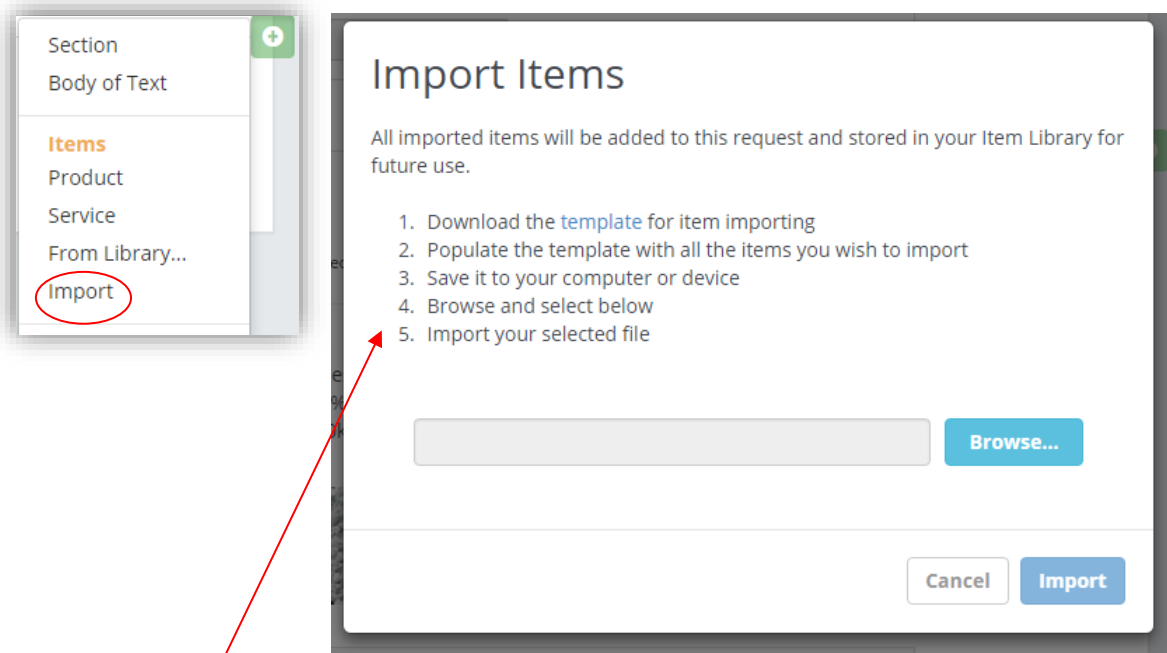
Edit icon in the item. By selecting Duplicate here, this will clone the item to the bottom of the section. 'Edit' will allow the item to be edited assuming it is not in use in another request. 'Remove' will remove the item from the Request but not the Library.

Important to note:

When over an item the cursor will change to this icon.  Once this cursor is visible, hold CTRL key and drag the item anywhere in the request. This will also duplicate the Item.

*Import*

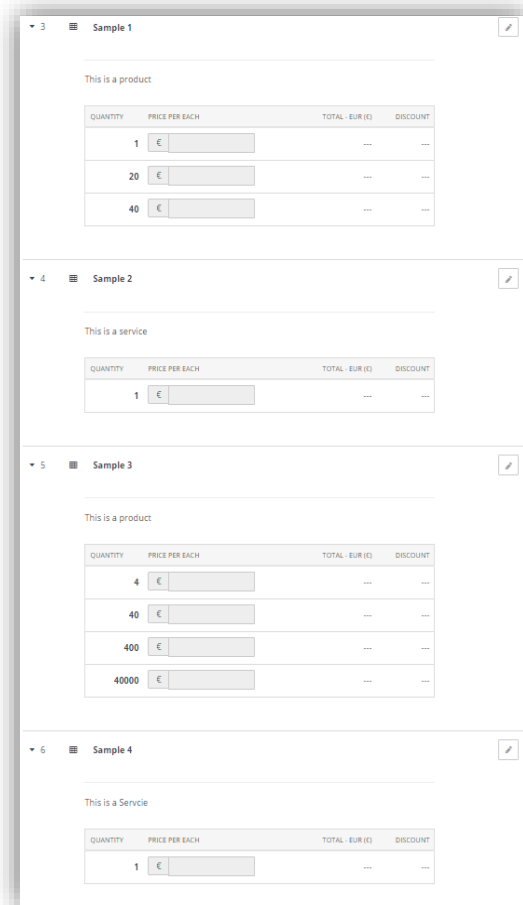
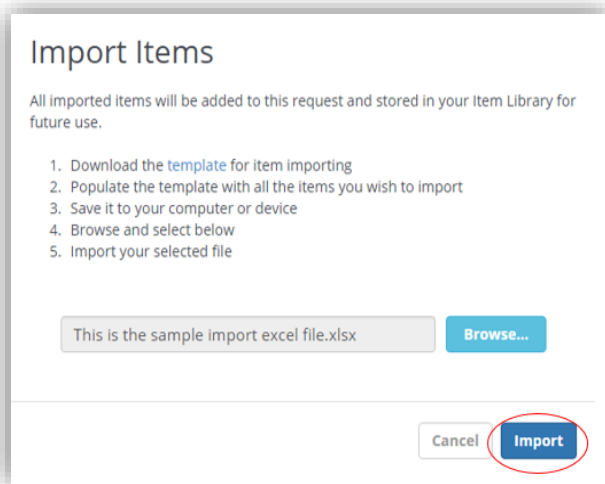
The Import option is useful if you would like to add multiple items to the request at once. Rather than individually creating these items, SourceDogg enables the User to 'bulk' upload the Items from an Excel template. To begin the process, select 'Import' from the 'Add Content' Dropdown. The below Pop-up will appear.



As can be seen in the instructions, this is a 5 step process. Clicking the highlighted [template](#) link will download the file.

	A	B	C	D	E	F	G	H	I	J
	Item Code (optional, max length = 16)	Name (required, max length = 200)	Product or Service (required, must be the word "product" or "service")	Summary (optional, max length = 600)	Default Quantity (required, numeric)	Volume Q.1 (optional, numeric)	Volume Q.2 (optional, numeric)	Volume Q.3 (optional, numeric)	Volume Q.4 (optional, numeric)	Volume Q.5 (optional, numeric)
1										
2	AB123	Sample 1	Product	This is a prod	1	20	40			
3	CD456	Sample 2	Service	This is a servi	1					
4	EF789	Sample 3	Product	This is a prod	4	40	400	40000		
5	GH1011	Sample 4	Service	This is a Servi	1					

Once the Template is complete, save to 'My Computer'. Back in SourceDogg, then select 'Browse', choose the file, and select 'Import'.



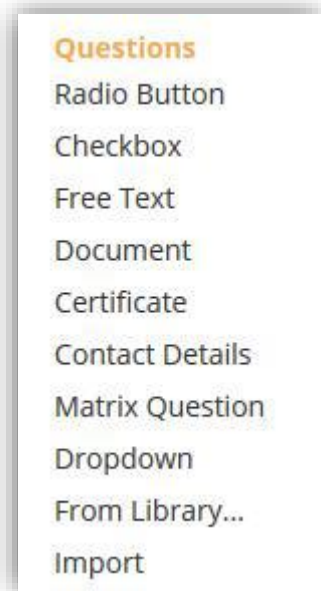
Once Imported, it adds directly to the content as can be seen here. In the example here, we can see only 4 items have been imported, but the import function is most relevant when there are multiple items that need to be imported.

**Important to Note:**

The Supplier on the receiving end of this Request will have the ability to download these items and upload them in bulk when the pricing is completed on the Excel form offline.

**Questions**

SourceDogg has a variety of Question types available to capture the information needed within a Request. Each question has its own unique functionality. The questions types are as follows: Radio Button, Checkbox, Dropdown, Freeform, Document, Certificate, Contact Details, and Matrix Question. As with Items, any questions previously created are available in the Library.

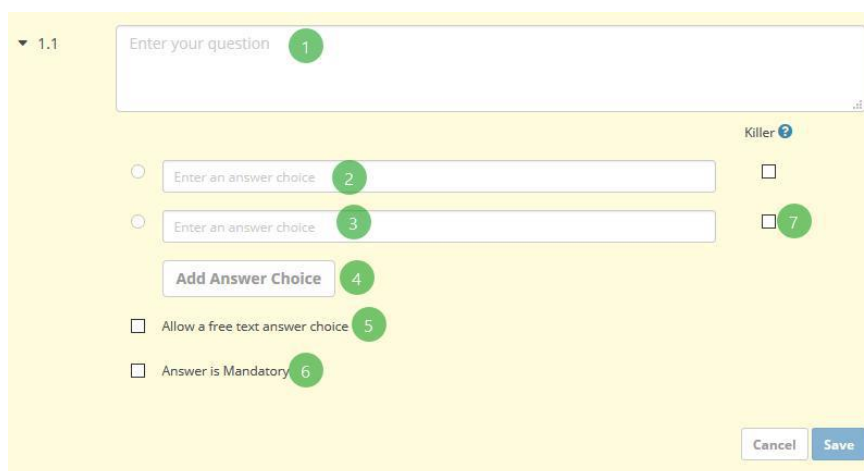


*Killer Question Feature*

The ‘Killer’ function allows the User to select an answer choice/choices that they would like ‘flagged’. If a Supplier selects a killer answer the User will be made aware of this in the response. See the “Response” section of this guide for more information.

*Radio Button*

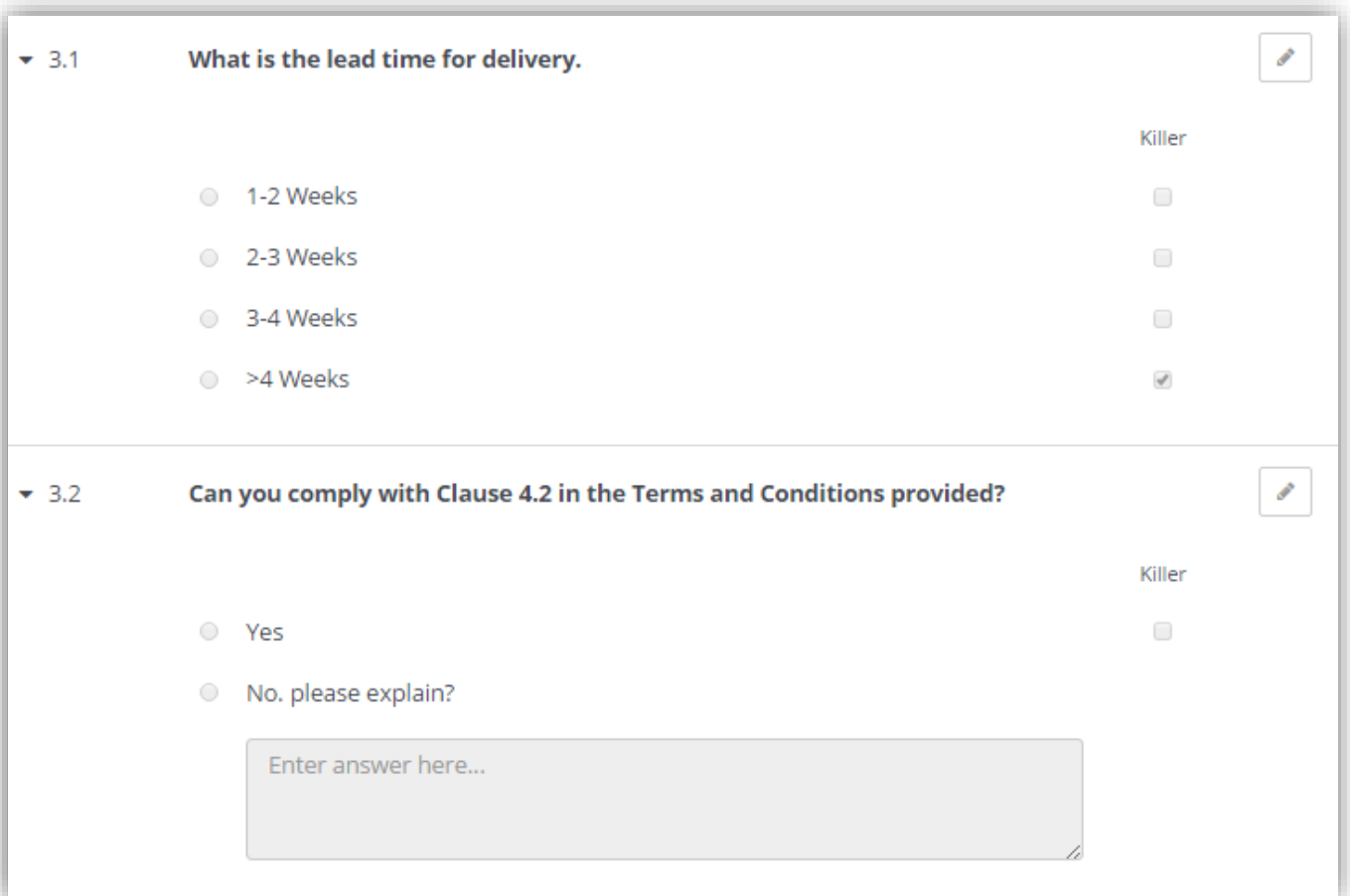
The Radio button Question is used to provide multiple answer choices, but only one option can be selected by the supplier. This question option can be used for ‘Yes/No’, ‘Lead time’ type questions and much more. In the ‘Add Content’ drop down simply select Radio Button. The question creation box below will appear.



1. You can enter the text of your question here
2. Here you define the answers that the supplier will be selecting from
3. Here you define the answers that the supplier will be selecting from

4. To add more answer choices, click on this button and another answer choice will be added. You can have an unlimited quantity of answer choices added to your question.
5. Allow a free text answer choice allows to add option that will give supplier the ability to write their answer by text instead selecting one of the options
6. Answer is mandatory - enables to make this question mandatory for the supplier. The supplier will not be able to respond to your request if this answer is not answered.
7. Selecting one or more answers as a Killer answer will display notifications if the supplier has used this option when responding during the evaluation stage.

A sample of completed Radio Button questions:



3.1 **What is the lead time for delivery.** ✎

Killer

1-2 Weeks

2-3 Weeks

3-4 Weeks

>4 Weeks

---

3.2 **Can you comply with Clause 4.2 in the Terms and Conditions provided?** ✎

Killer

Yes

No, please explain?

### *Checkbox*

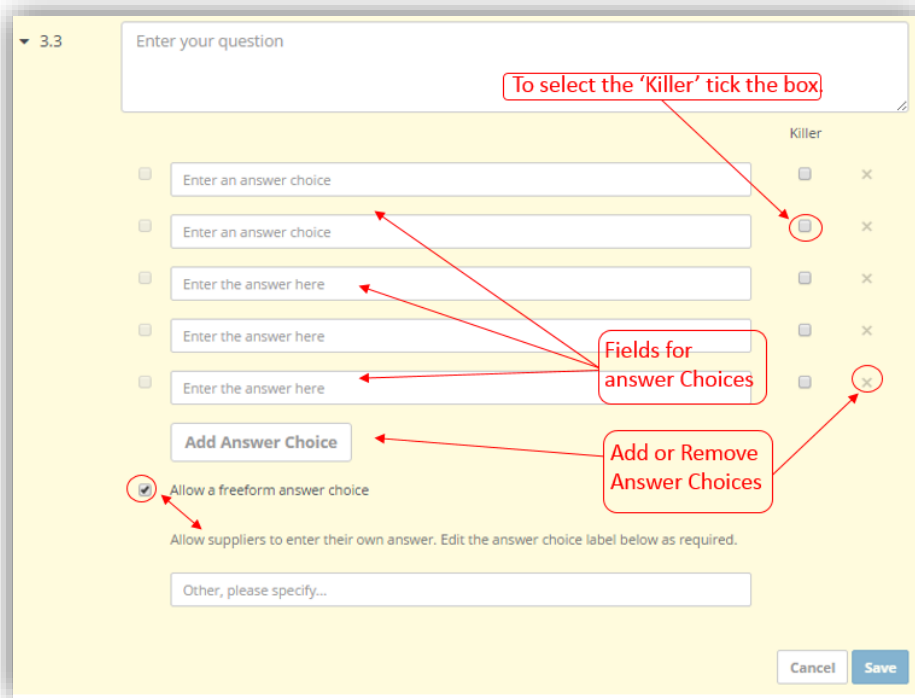
The Checkbox is very similar to the Radio Button Question above. The only difference is instead of only allowing the Supplier to tick one option, they can select multiple answers.

This question can be used for 'Which of the following...', 'Please Select the relevant...' and 'Choose the....' type questions.

In the 'Add Content' drop down simply select Checkbox. The question creation box below will appear.

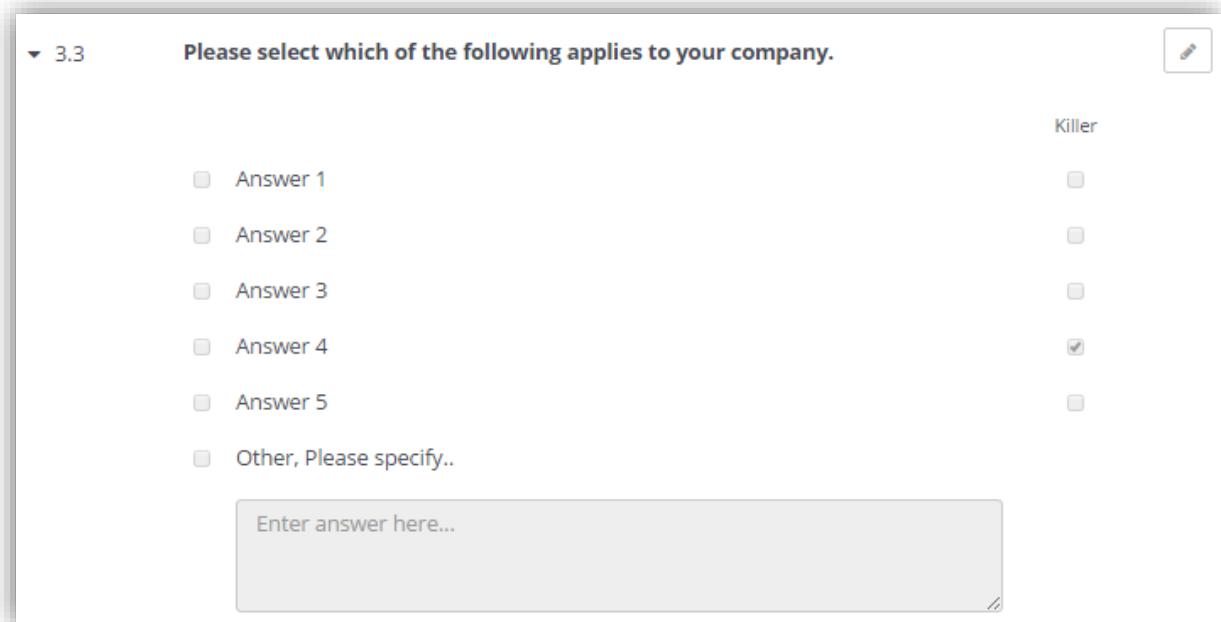
**Important to Note:**

The 'Killer' function can also be used in the Checkbox questions.

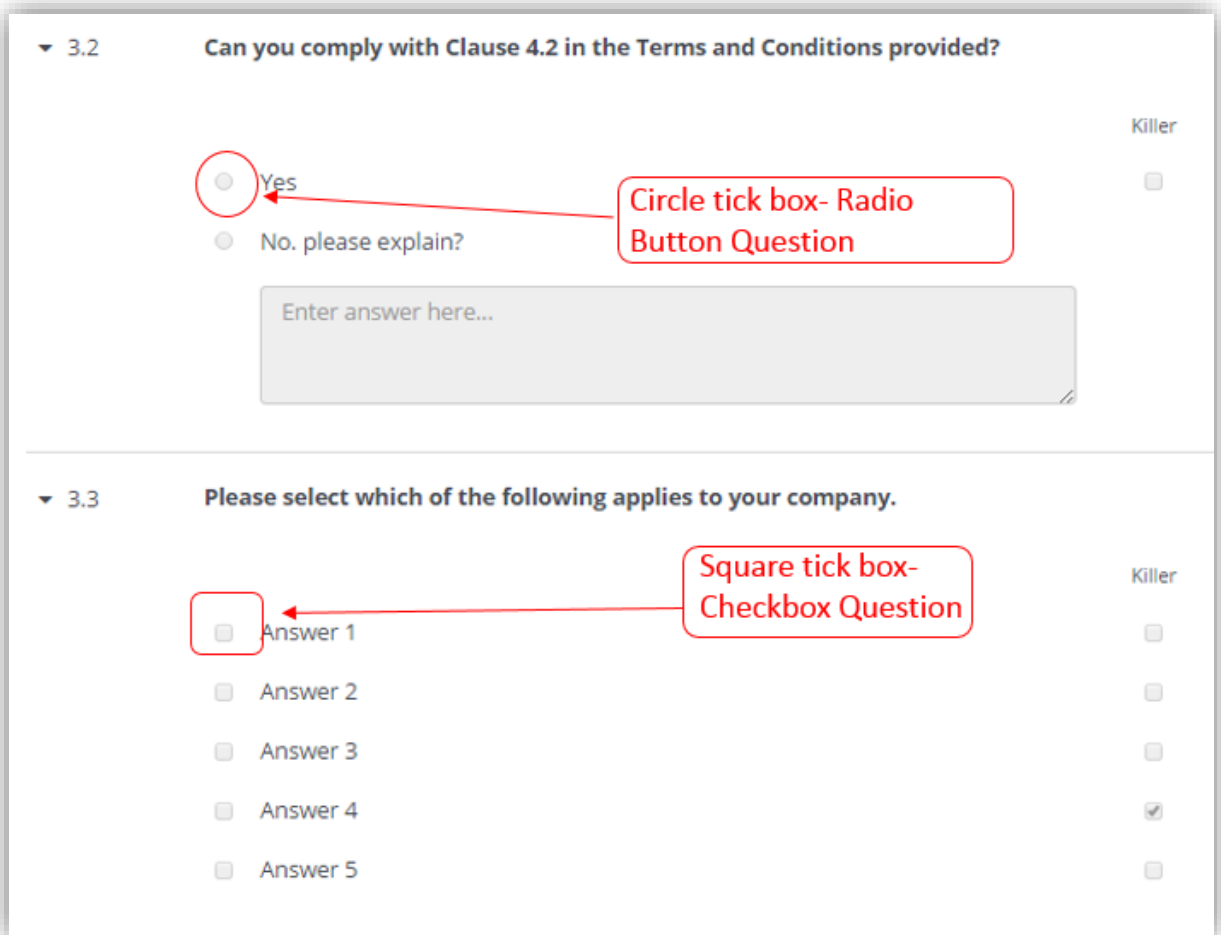


The option to make a question Mandatory is also available for the Checkbox type question.

Below is an example of a completed Checkbox question.



**Important to Note:** To distinguish between a Radio button Question and Checkbox question note the shape of the tick box. A Radio Button has a round tick box and a Checkbox has a square tick box.



The screenshot displays two examples of questions in a list:

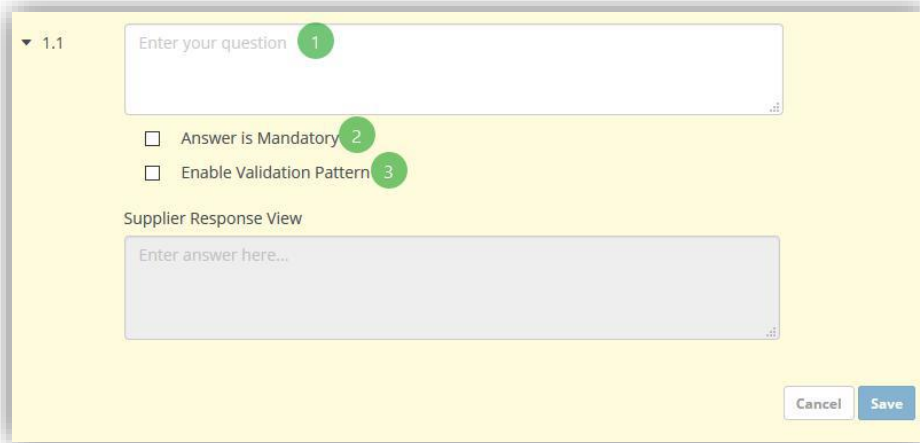
- Question 3.2:** "Can you comply with Clause 4.2 in the Terms and Conditions provided?"
  - Options:  Yes,  No. please explain?
  - Annotation: A red circle highlights the "Yes" radio button, with a callout box stating "Circle tick box- Radio Button Question".
  - Input field: "Enter answer here..."
  - Control: "Killer" button with
- Question 3.3:** "Please select which of the following applies to your company."
  - Options:  Answer 1,  Answer 2,  Answer 3,  Answer 4,  Answer 5,  Answer 5
  - Annotation: A red square highlights the "Answer 1" checkbox, with a callout box stating "Square tick box- Checkbox Question".
  - Control: "Killer" button with

### Freeform

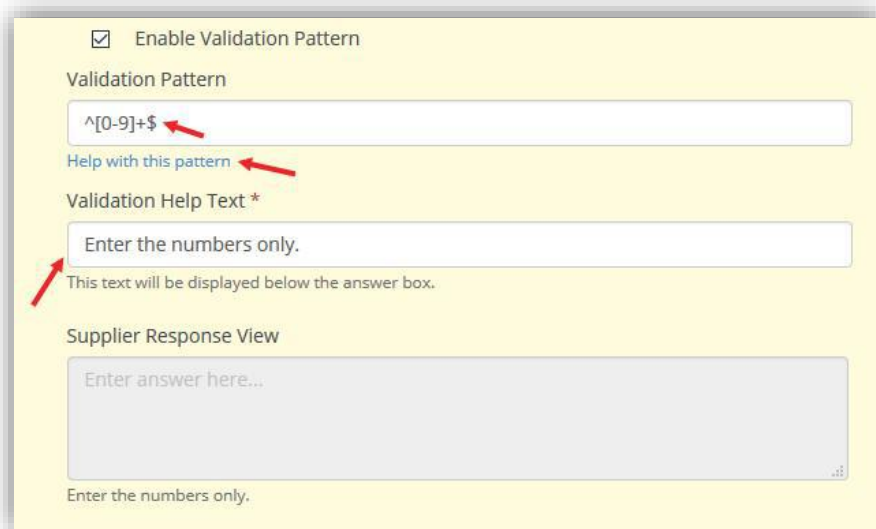
The freeform question is a question that allows a 'block of text' response from the supplier, whether it's one line answer or an 'essay' type answer.

This question can be used for 'Please explain...', 'What are the details of...,' and 'How does...,' Type questions.

In the 'Add Content' drop down simply select Freeform. The question creation box below will appear.



1. Here you can write the question for the respondent to complete.
2. Selecting this option will make the question mandatory and the supplier will not be able to submit a response to your RFX without completing it
3. Enables validation pattern. This allows you to define the formula that will be used to verify the content of the supplier answer. Only data entered matching the validation pattern will be accepted as a valid answer.



You can enter the validation pattern using Regular Expressions or click on “Help with this pattern” where several examples are saved. The Validation Help Text is mandatory field when using the validation pattern as it helps the supplier to understand the requirements.

Below, a completed Freeform Question.

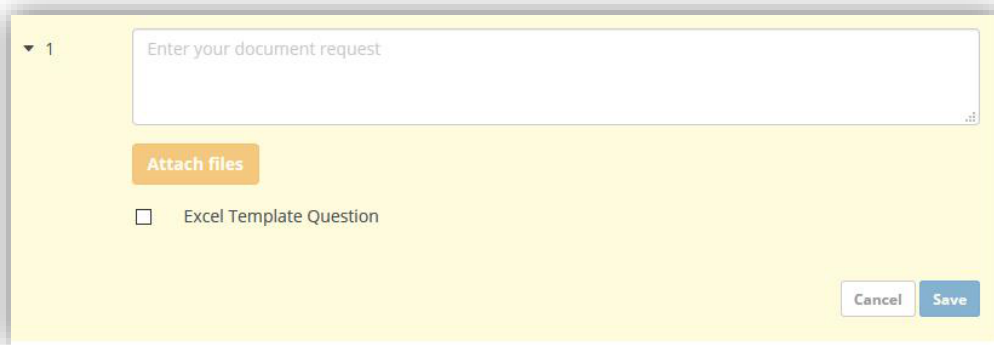


### Document

The Document Question allows the User to gather any number of documents from the Supplier.

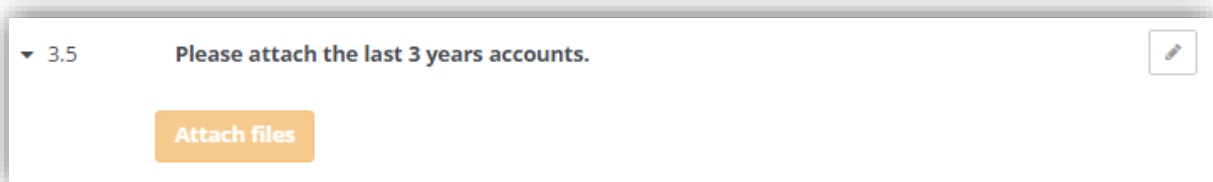
This question can be used for 'Please attach...', or 'Include Supporting Documents' Type questions.

In the 'Add Content' drop down simply select Document. The question creation box below will appear.



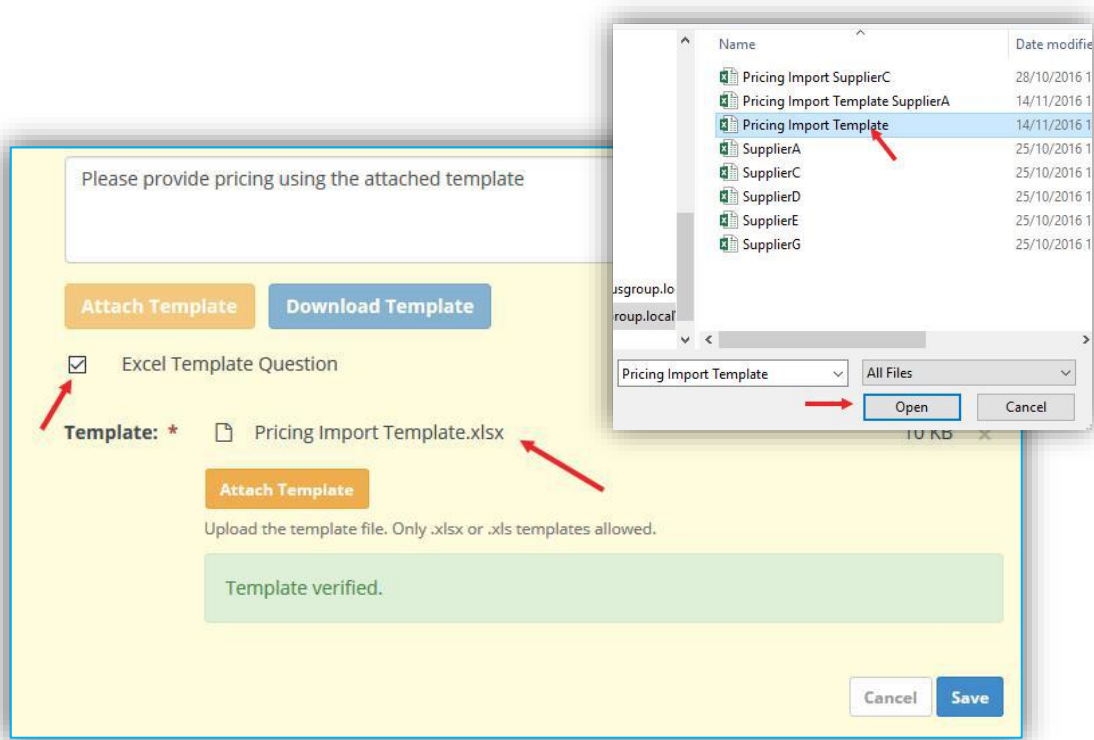
A screenshot of a form for creating a document question. The form has a yellow background and a white border. At the top left, there is a dropdown menu with a downward arrow and the number '1'. To the right of the dropdown is a text input field with the placeholder text 'Enter your document request'. Below the input field is an orange button labeled 'Attach files'. Underneath the button is a checkbox labeled 'Excel Template Question'. At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

A completed Document question.



A screenshot of a completed document question. The question is displayed in a white box with a grey border. On the left, there is a dropdown menu with a downward arrow and the number '3.5'. To the right of the dropdown is the text 'Please attach the last 3 years accounts.' followed by a small edit icon. Below the text is an orange button labeled 'Attach files'.

By selecting the Excel Template Question checkbox, this will extend the functionality of the document question and you will be able to upload the pricing template for the suppliers to fill with the information required. The template to be used must be in excel format and cannot have any merged cells. SourceDogg recommends using simple spreadsheets without pictures to achieve the best results when exporting the data.



When this option is selected, the supplier must download the template and then upload it back with their pricing data into the same question. Please note that once a document question has been converted to an Excel Template Question, the supplier can only respond to that question by uploading an updated copy of the template. Other files will be blocked.

### *Certificate*

The Certificate Question allows the User collect certificates or document that are registered Documents with an Issue and Expiry date. The date collected here will be visible on the Supplier Profile.

This question can be used for 'ISO Certs' and 'Insurance Details' type questions.

In the 'Add Content' drop down simply select Certificate. The question creation box below will appear.

3.5

**Certificate Type**

**Certificate Notes**

**Supplier Response View**

**Certificate Title**

**Certificate Number**

**Certificate Issued By**

**Issue Date**

**Expiry Date**

**Attach files**

Attach any relevant documents or images

A completed Certificate question. Note the Square at the bottom is the view the Supplier will see the Certificate Question.

▼ 3.6
**ISO 9001 - Quality management**
✎

**Certificate Type**

ISO 9001 - Quality management

**Certificate Notes**

Please attach a copy of the ISO 9001 Certificate with each field populated including issue and expiry date.

**Supplier Response View**

**ISO 9001 - Quality management**

*Please attach a copy of the ISO 9001 Certificate with each field populated including issue and expiry date.*

**Certificate Title**

**Certificate Number**

**Certificate Issued By**

**Issue Date**

📅

**Expiry Date**

📅

Attach files

Attach any relevant documents or images

### Contact details

The Contact Question allows you to capture information on individual contacts such as Name, Role, Phone, Mobile, Fax, Email, and Address.

SourceDogg allows the User to select whether certain fields are Hidden, Optional or Required for the Supplier to complete upon response.

This question can be used for 'Account Manager' and 'Point of Escalation' type questions.

In the 'Add Content' drop down simply select Contact details. The question creation box below will appear.

The image shows two overlapping screenshots of the SourceDogg interface. The top screenshot is titled '3.7 Contact Type' and shows a form for creating a question. It includes a text input for 'Enter the Contact type' and a list of fields with radio button options for 'Hide', 'Optional', and 'Required':

- Contact Name:  Hide  Optional  Required
- Contact Role:  Hide  Optional  Required
- Contact Phone:  Hide  Optional  Required
- Contact Mobile:  Hide  Optional  Required
- Contact Fax:  Hide  Optional  Required
- Contact Email:  Hide  Optional  Required
- Contact Address:  Hide  Optional  Required

Below these is a text area for 'Contact Notes' and a 'Supplier Response View' section. A red callout box with arrows pointing to the radio buttons says 'Choose an option for each field.' Another red callout box points to the 'Supplier Response View' section and says 'What the Supplier sees.' The 'Supplier Response View' section shows a preview of the question with fields for Contact Name, Contact Role, Contact Phone, and Contact Email.

The bottom screenshot is titled '3.7 Account Manager' and shows a completed question. The 'Contact Type' is 'Account Manager'. The 'Contact Notes' field contains the text 'Please enter the details below for the Account Manager'. The 'Supplier Response View' section shows a preview of the question with the following fields:

- Account Manager
- Please enter the details below for the Account Manager
- Contact Name \*
- Contact Role
- Contact Phone
- Contact Mobile \*
- Contact Email \*

A red arrow points from the text 'A completed Contact Details Question.' to the 'Supplier Response View' section of the 'Account Manager' question.

## Matrix

The Matrix question allows you to capture the data in the form of an Excel-like spreadsheet.

**Matrix Question**

Enter your turnover and profit for the last three years

	A	B	C
1	Year	Turnover	Profit
2	2015		
3	2014		
4	2013		
5	Lowest	=min(B2:B4)	=min(C2:C4)

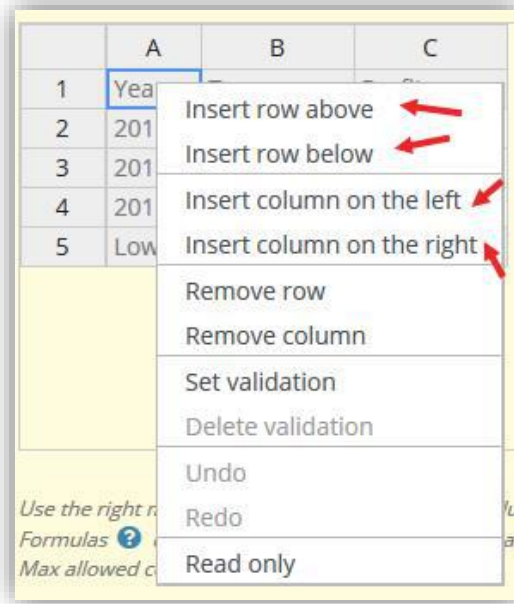
You can add the number of rows and columns so it matches the requirement you have for the data you are collecting from suppliers. To do this, right-click on any cell in the matrix and select the appropriate option. To select multiple cells, click on the cells and then move the mouse in selected direction to include additional cells into your selection. If you click on the column or row, all the relevant cells will be selected.

	A	B	C
1	Year	Turnover	Profit
2	2015		
3	2014		
4	2013		
5	2012		
6	2011		
7	Lowest	=min(B2:B6)	=min(C2:C6)

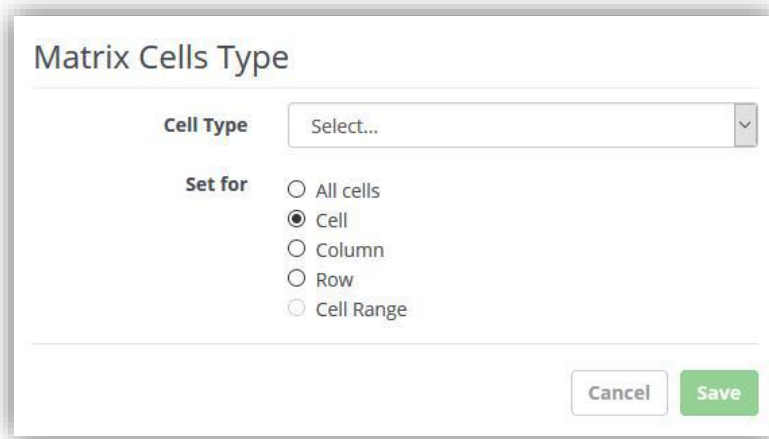
	A	B	C
1	Year	Turnover	Profit
2	2015		
3	2014		
4	2013		
5	2012		
6	2011		
7	Lowest	=min(B2:B6)	=min(C2:C6)

	A	B	C
1	Year	Turnover	Profit
2	2015		
3	2014		
4	2013		
5	2012		
6	2011		
7	Lowest	=min(B2:B6)	=min(C2:C6)

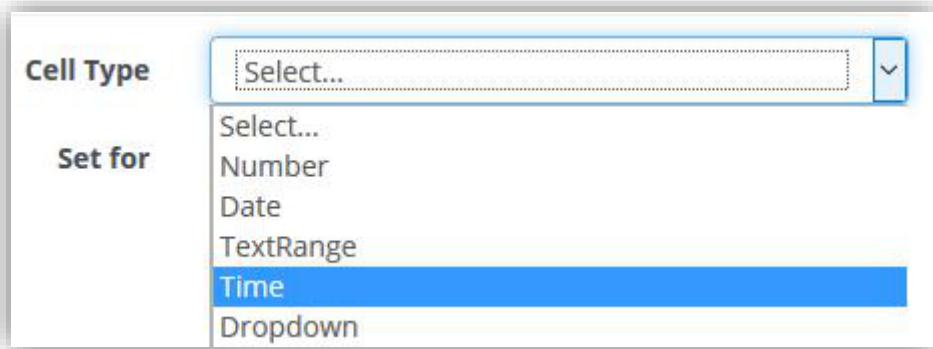
When you now use right click, all the actions done will apply to all cells that have been selected.



It is also possible to set up a validation pattern for each cell, or for rows or columns as needed. This will ensure the consistency of data entered by suppliers. To activate the validation pattern, select one of the cells, right click and select Set validation from the context menu.



Here you can select the range you want to apply the validation for, e.g. Cell, Column or Row. You can also select the validation type from the Cell Type menu, currently available are validations by number, date, the length of the text, time or dropdown list.



Once the validation pattern is set up for the cell or range of cells, this is indicated by the dark grey colour as on the picture below.

	A	B	C
1	Year	Turnover	Profit
2	2015		€0 - €100,000 ▼
3	2014		
4	2013		
5	Lowest	=min(B2:B4)	=min(C2:C4)

You also have the option to make the cells read-only by selecting this option in the context menu or use the checkbox Answer is Mandatory for making all the cells mandatory for the supplier.

Cells in a matrix question can optionally contain formulas to allow you to build complex question structures.

Formulas begin with an equals sign and may contain common operators +,-,/,\*, numbers, references to other cells, parenthesis(,) and the functions listed below.

Examples:	
FORMULA	DESCRIPTION
=A1+B1	Sum values A1 and B1
=SUM(A1:A5)	Sum values from the range A1:A5
=MAX(A1:0)	Max value from the range A1:A10
=SUMIF(A5:J5,'>5')	Sum values from the range A5:J5, if greater than 5
=IF(A1>B2,'TRUE','FALSE')	TRUE if A1 value is greater than B1, otherwise - FALSE
=AVERAGE(A1:D1,H1)	Average value for the range A1:D1, including H1



The list of all supported functions is below:

**▼ List of Supported Functions**

ABS, ACCRINT, ACOS, ACOSH, ACOTH, AND, ARABIC, ASIN, ASINH, ATAN, ATAN2, ATANH, AVEDEV, AVERAGE, AVERAGEA, AVERAGEIF, BASE, BESSELI, BESSELJ, BESSELK, BESSELY, BETADIST, BETAINV, BIN2DEC, BIN2HEX, BIN2OCT, BINOMDIST, BINOMDISTRANGE, BINOMINV, BITAND, BITLSHIFT, BITOR, BITRSHIFT, BITXOR, CEILING, CEILINGMATH, CEILINGPRECISE, CHAR, CHISQDIST, CHISQINV, CODE, COMBIN, COMBINA, COMPLEX, CONCATENATE, CONFIDENCENORM, CONFIDENCET, CONVERT, CORREL, COS, COSH, COT, COTH, COUNT, COUNTA, COUNTBLANK, COUNTIF, COUNTIFS, COUNTIN, COUNTUNIQUE, COVARIANCEP, COVARIANCES, CSC, CSCH, CUMIPMT, CUMPRINC, DATE, DATEVALUE, DAY, DAYS, DAYS360, DB, DDB, DEC2BIN, DEC2HEX, DEC2OCT, DECIMAL, DEGREES, DELTA, DEVSQ, DOLLAR, DOLLARDE, DOLLARFR, E, EDATE, EFFECT, EOMONTH, ERF, ERFC, EVEN, EXACT, EXPONDIST, FALSE, FDIST, FINV, FISHER, FISHERINV, IF, INT, ISEVEN, ISODD, LN, LOG, LOG10, MAX, MAXA, MEDIAN, MIN, MINA, MOD, NOT, ODD, OR, PI, POWER, ROUND, ROUNDDOWN, ROUNDUP, SIN, SINH, SPLIT, SQRT, SQRTPI, SUM, SUMIF, SUMIFS, SUMPRODUCT, SUMSQ, SUMX2MY2, SUMX2PY2, SUMXMY2, TAN, TANH, TRUE, TRUNC, XOR


Supplier Response View is displayed below the Matrix question set up at all times.



**Supplier Response View**

Enter your turnover and profit for the last three years

Year	Turnover	Profit
2015		€0 - €100,000
2014		
2013		
Lowest		

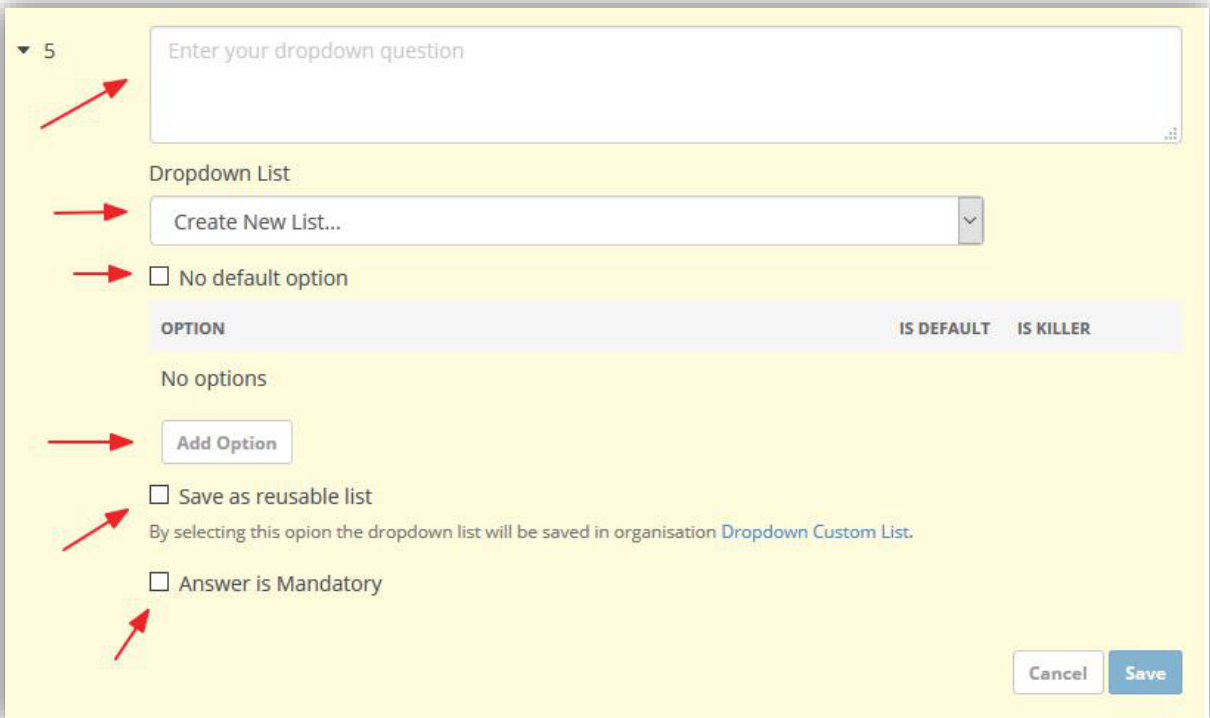
The option to make the Matrix question mandatory also exists, in this case, suppliers will have to answer all cells in the matrix that are not read-only

Use the right mouse button to change rows and columns and to make cells read-only.  
 Formulas  can be entered into cells to provide calculation functionality.  
 Max allowed cell content length is 1000 characters.

 Answer is Mandatory 

### Dropdown

Dropdown question type can be used to define the list of options the supplier will select from - they will not be required to type anything when answering the dropdown question. It is used for questions similar to “Where is your company HQ” or “Select the category of products you provide”. This is especially useful if the list is too long to be easily capture in a Radio-button question.



5

Enter your dropdown question

Dropdown List

Create New List...

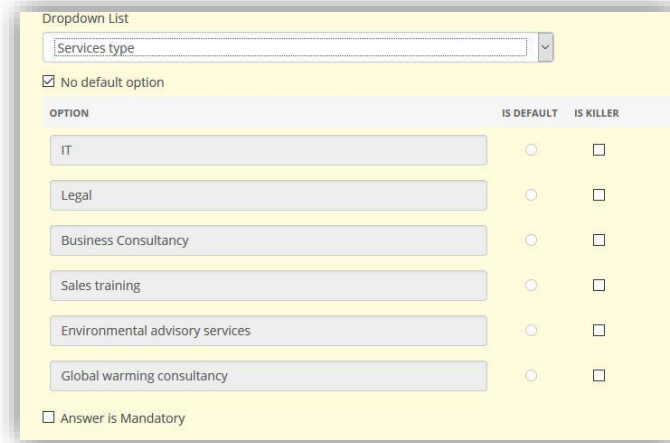
No default option

OPTION	IS DEFAULT	IS KILLER
No options		

Save as reusable list  
By selecting this option the dropdown list will be saved in organisation [Dropdown Custom List](#).

Answer is Mandatory

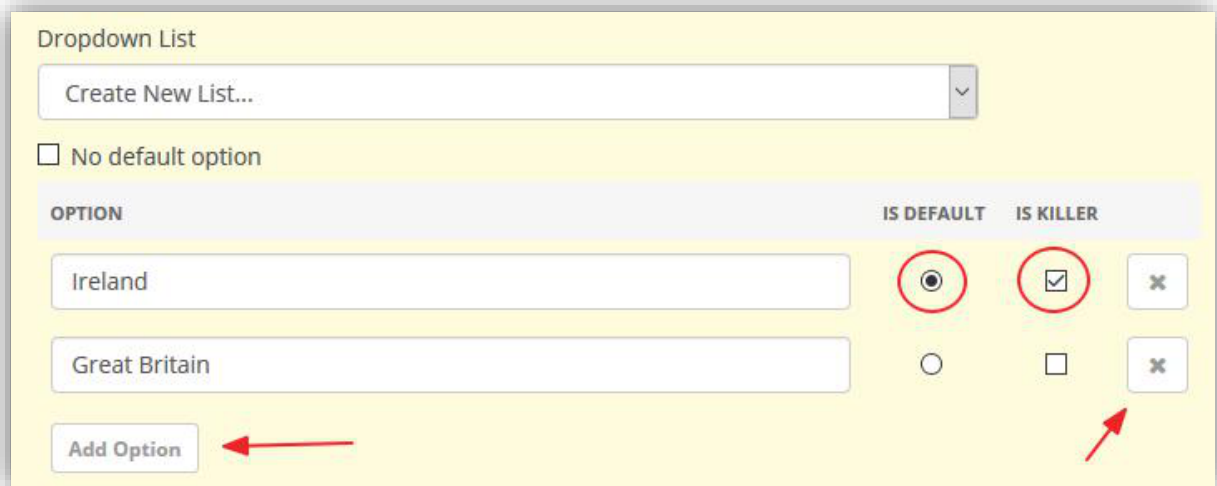
To complete the question, type the question into text box first. Then select the dropdown options from the existing list or create a new one by clicking on the Add Option button.



OPTION	IS DEFAULT	IS KILLER
IT	<input type="radio"/>	<input type="checkbox"/>
Legal	<input type="radio"/>	<input type="checkbox"/>
Business Consultancy	<input type="radio"/>	<input type="checkbox"/>
Sales training	<input type="radio"/>	<input type="checkbox"/>
Environmental advisory services	<input type="radio"/>	<input type="checkbox"/>
Global warming consultancy	<input type="radio"/>	<input type="checkbox"/>

By selecting the existing dropdown list this will open the predefined options from the list and you can select if any of the answers are to be a “killer” answer. Also, you can select one of the options as default and this will then be pre-selected for a supplier when answering the question.

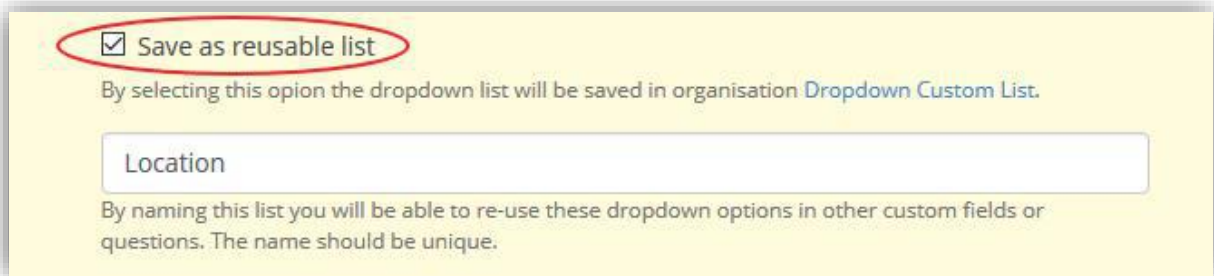
When creating a new dropdown list, the click on “Add Option” button and keep adding required amount of options.



OPTION	IS DEFAULT	IS KILLER
Ireland	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
Great Britain	<input type="radio"/>	<input type="checkbox"/>

To delete one of the options, the click on the small X sign next to the option. One of the options in the newly created list can be selected as a default, to do this, click on the “Is Default” button. The Default option will be prepopulated in the field and the respondent will have to click and select another option if required. Any of the options can be selected to be a killer answer. To make an option a killer, tick the associated ‘Is Killer’ option.

A list can then be named and saved for repeated use by selecting the “Save as reusable list” checkbox. This will save the list into the Dropdown Custom Lists settings in the admin module and allow the same list to be re-used anytime it is required. If this option is not selected, the list will not be saved and will only be used for this one question.



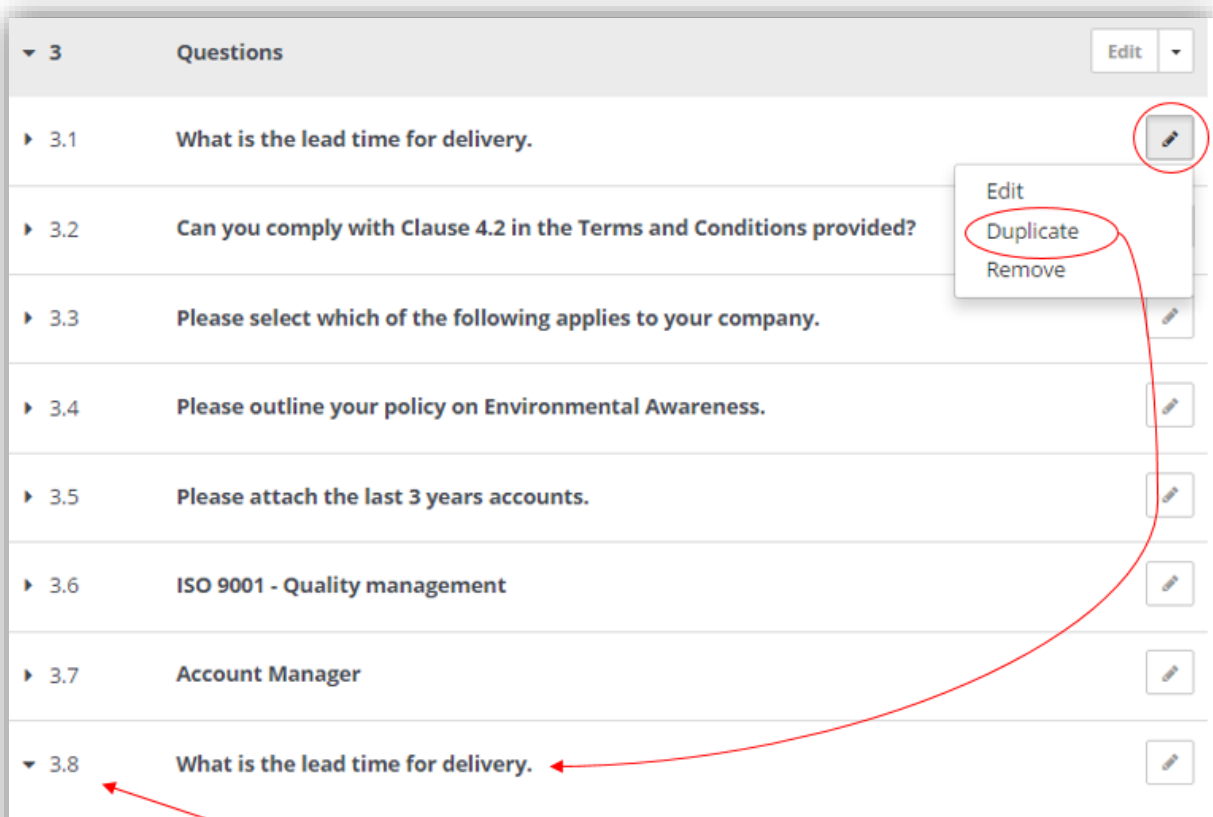
It is also possible to make any dropdown type question mandatory.

#### *From Library...*

The Question Library has exactly the same functionality as the Items Library. Please see the 'Items Library' section for more information.

Questions also have the same Duplicate functionality as items. By clicking on the Pen icon, the User can choose between Edit, Duplicate or Remove.

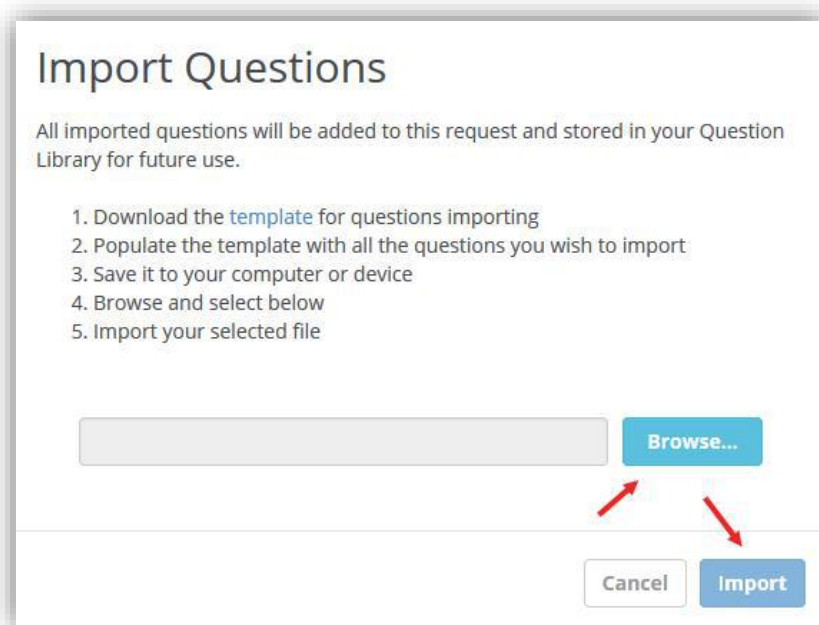
Selecting Duplicate here, will clone the question and move it to the bottom of the section. 'Edit' will allow the question to be edited assuming it is not being used in another request. 'Remove' will remove the question from the Request, but not the Question Library.



### Questions import

Questions import is the last option in the menu list and it allows you to design the questions in an excel template and then upload this, populating the request with these questions. All questions are supported except for Matrix question. For details on how to create individual questions please refer to “Introduction sheet” within the template file.

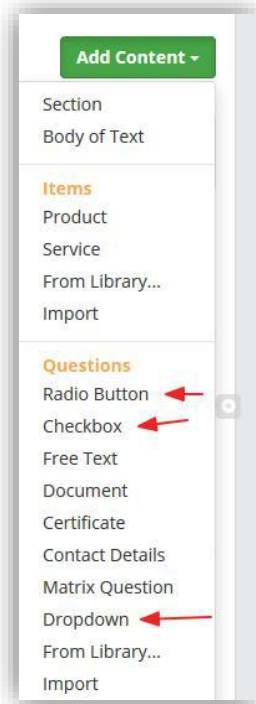
To import the template, find the path to your prepared file and click on the Import button.



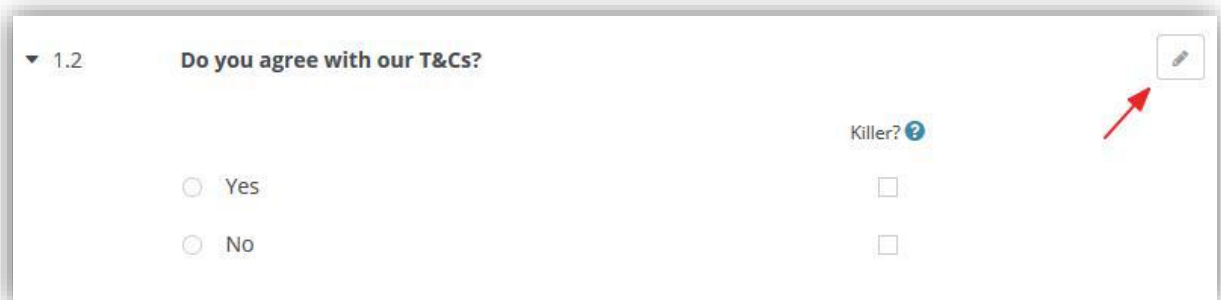
### Guard questions

These are sub-questions you can create. Suppliers will be required to answer the sub-questions and depending on how they answer the main question and how the rules for the questions are set up.

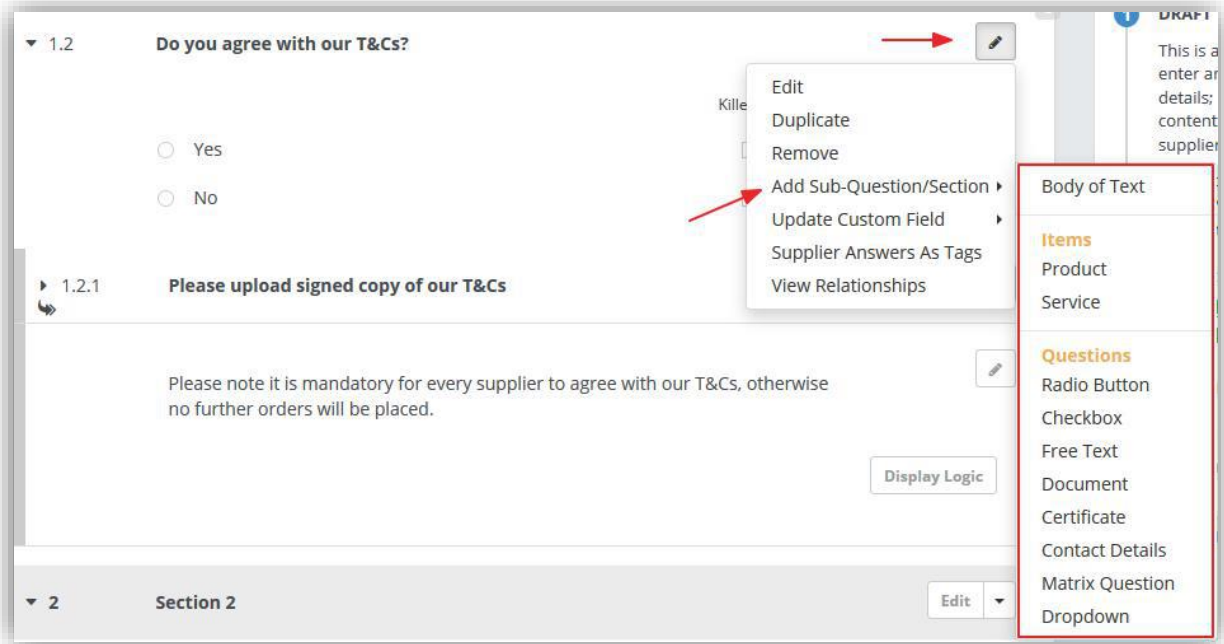
The first step in setting up a Guard Question is to create either a Radio Button, Checkbox, or Dropdown question.



Once the question is created, click on the pencil icon next to the question to open the dropdown menu.



To add a sub-question, click the “Add Sub-question” button and select the element you would like to add. Any type of question can be added as a sub-question and user can also add products or services as sub-question. It is also possible to select that a Body of Text option be displayed.

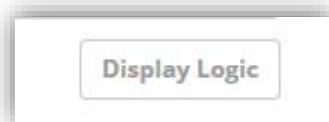


When a sub-question is added, it is placed below the Parent Question and is indented and marked with an arrow icon.




The Display Logic settings are where you create the rules governing what sub-questions will appear depending on what Parent Question options are chosen by the respondent.


To define the rules for displaying a sub-question, click on the “Display Logic” button and fill the information required.







If the answer to Question [2.1] 'Please select locations where you can deliver the goods' is


**Rule \*** Equal To 

**Answers \***



Leitrim 

Sligo  


Galway  



Answers condition

 All of the above 

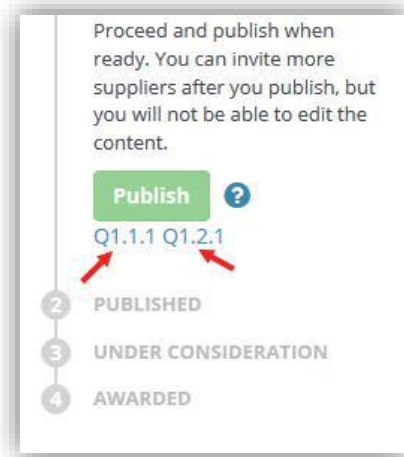
Then make this Question

**State \*** Active 

When setting up rules for displaying the question, firstly you need to define the rule - whether this should “Equal To” or “Not Equal To” the answer options selected, then you must select single or multiple answer(s) from the list and select answers condition. These can be “All of the above” which means the rule is matched if supplier selects all the answer choices or “Any of the above” in which case only one of the answer options can be selected and the rule will apply. For the final step, the user sets if the question should be active or inactive if the rules above are matched via selecting from the options in the State dropdown.



If you forgotten to set up a display logic for a guard question, a link to the question will be displayed below the Publish button.



User must complete the display logic for each of the sub-questions, otherwise they will not be able to publish the request online.

**NOTES:**

1. Due to the complexity of the guard questions, the scoring is disabled if there is any guard question used in the RFX.
2. If questions are moved within sections of an RFX, the Display Logic is broken and must be set up again.

**Order**

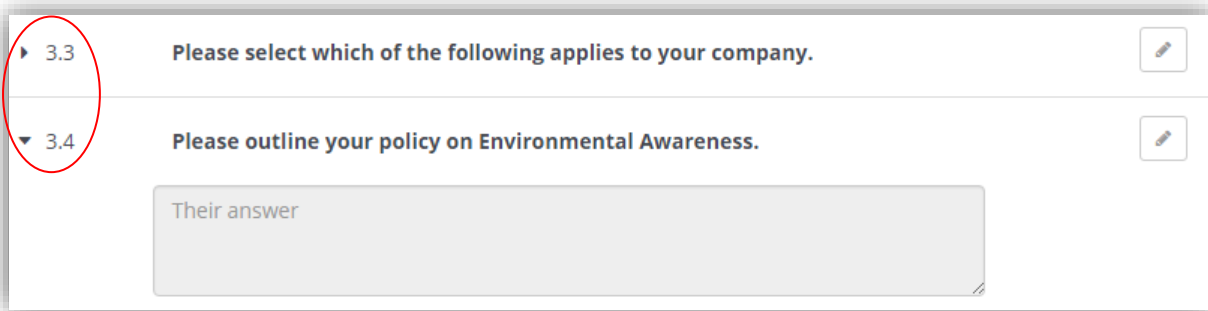
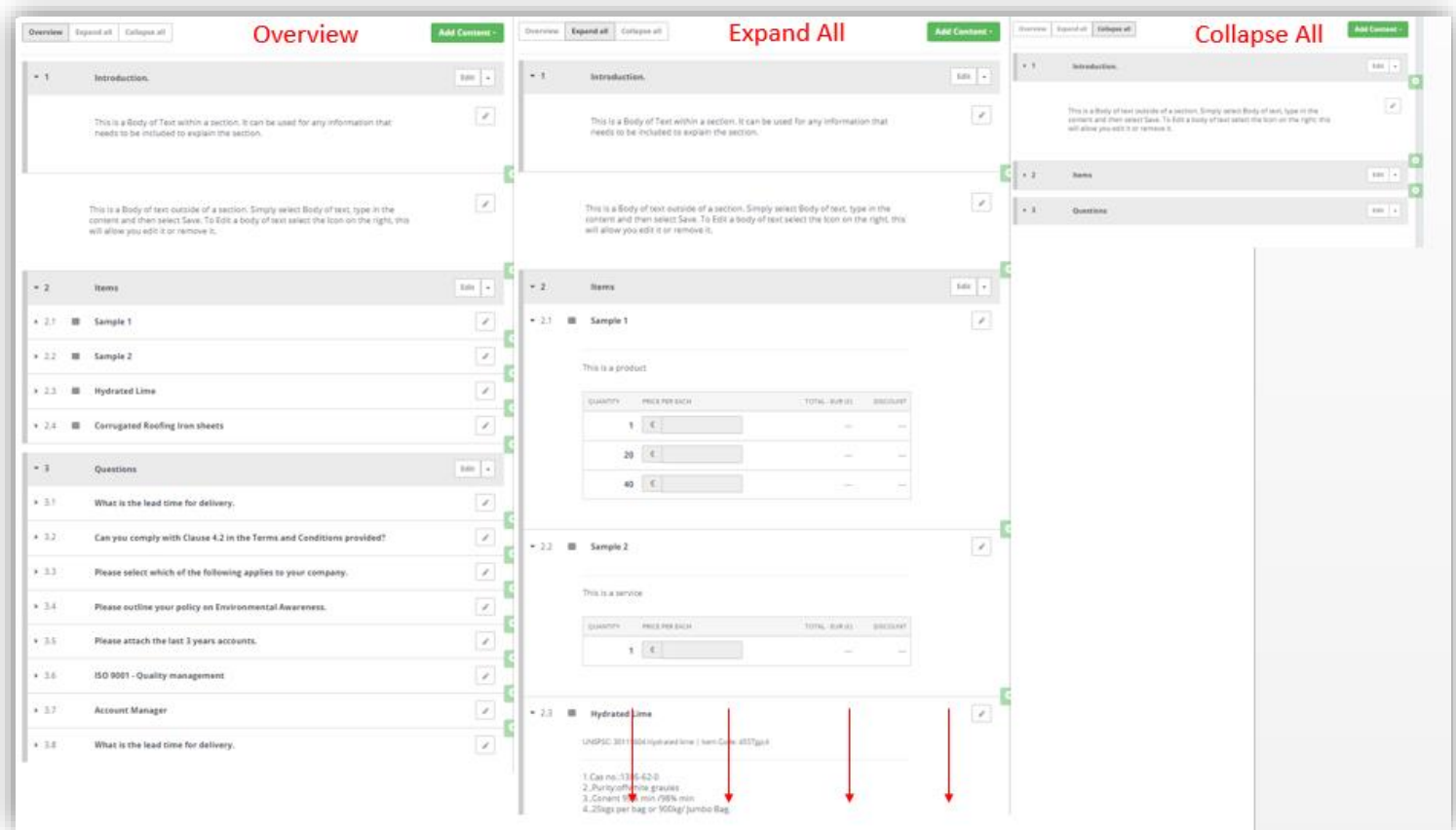
The Order of the Content can be changed and edited throughout the creation process. This can be done by editing the view, rearranging the content, removing content.

**View**

To give visibility to the entire Content, SourceDogg has three types of view.

- Overview: This view is of Sections open with the Item and Questions showing.
- Expand All: This View opens out every Section, Item, and Question.

- Collapse All: This view collapses the content into sections only.



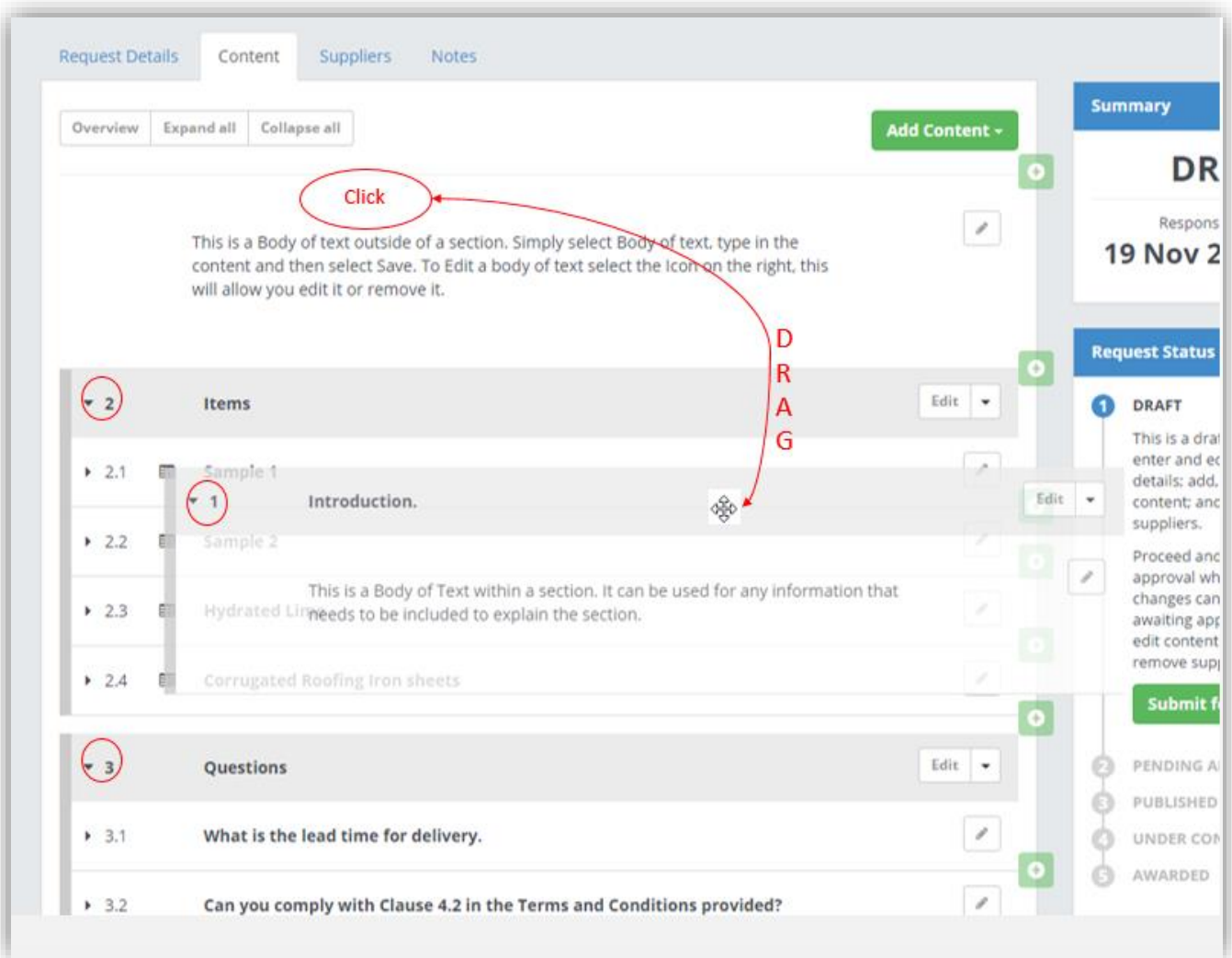
Using the drop down arrows on the left of the content, will expand/collapse any Question, Item or Section. If the arrow points down, it is expanded, if it points to the right, it is collapsed.

### Rearranging the content

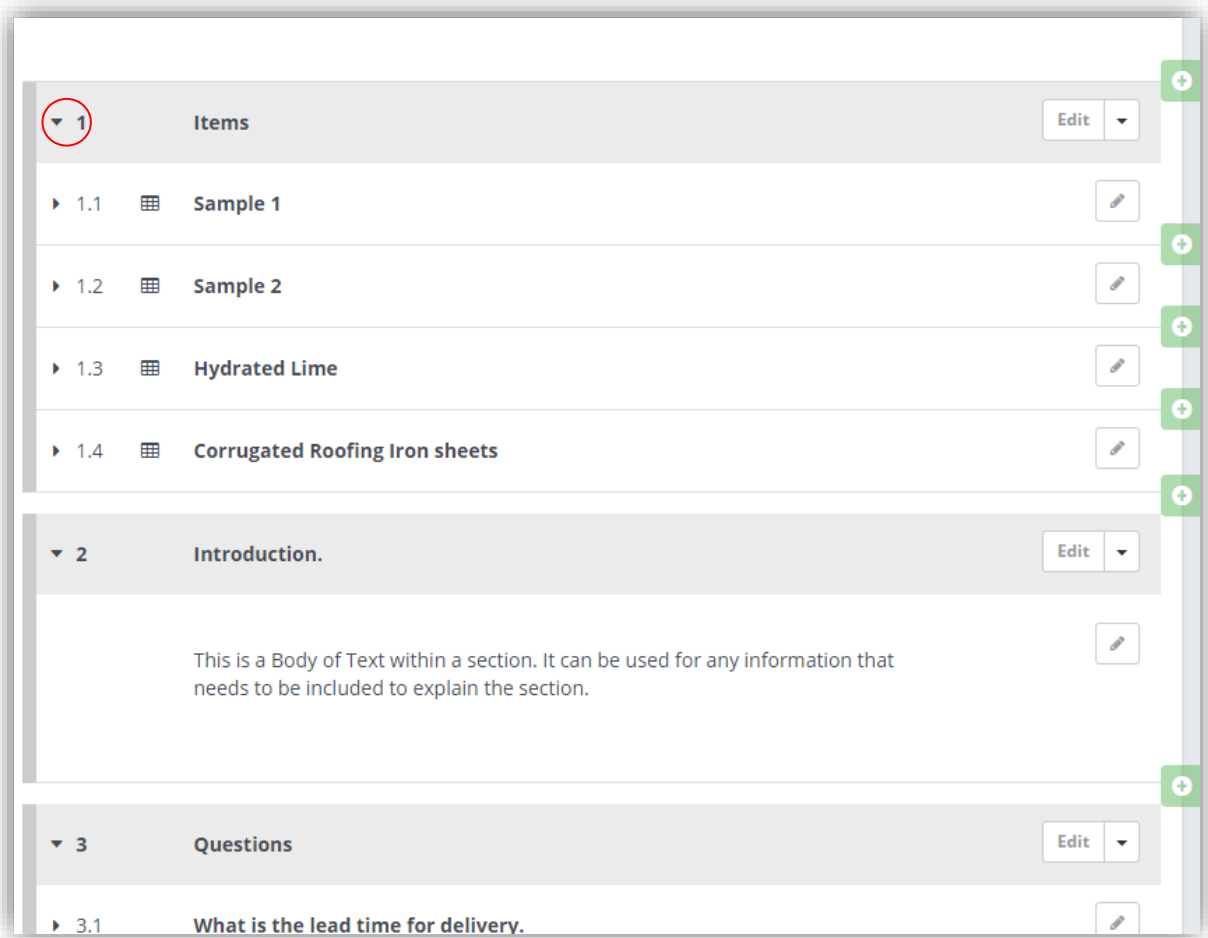
Content can be moved around at any stage in the creation process. Sections can be switched and the Questions and Items within can also be rearranged or moved to another section.

To begin to rearrange content, click and hold the left mouse key on the Section, Question or Item you would like to move. This will allow the user to click and drag content above or below other content.

See below how the Introduction Section (1) is clicked and dragged to be the second section (2).

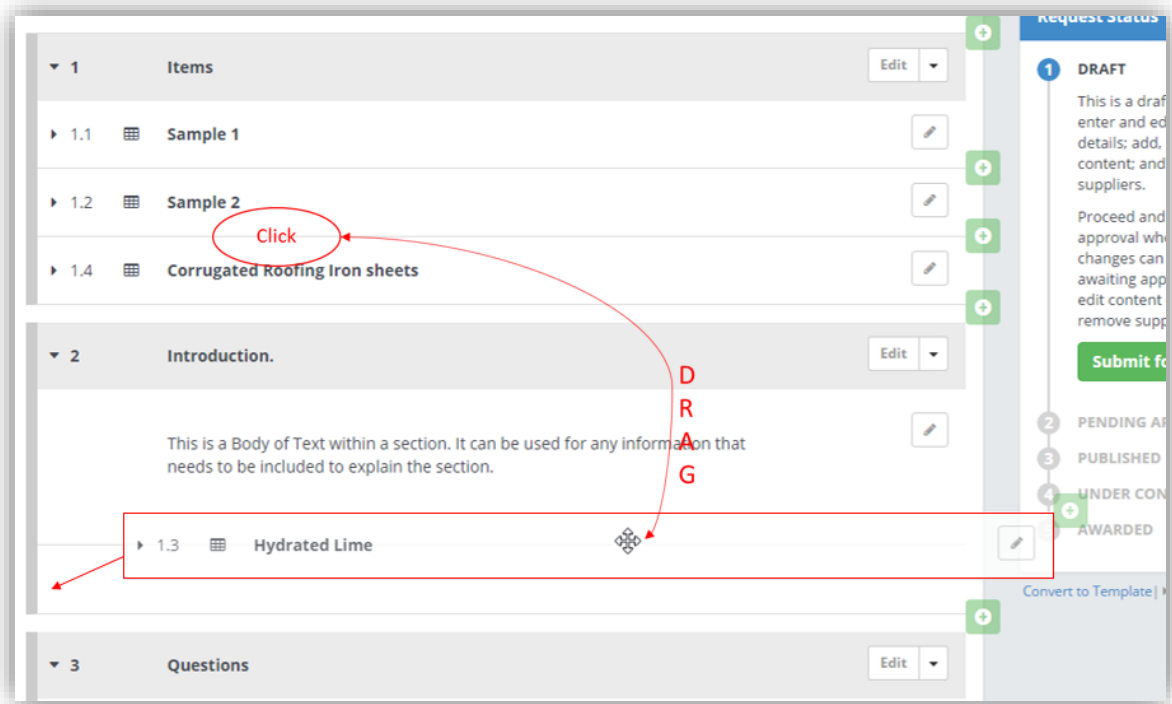


Note in the newly arranged Content below, that the numbers have automatically changed. This change also happens within each section. So what was previously Question 1.1, when will become Question 2.1



The exact same functionality applies to rearrange Questions and Items. Question and Items can also be taken from one section and added into another.

See the Screen Grabs below when Hydrated Lime (Question 1.3), is moved from Section 1 into Section 2. Hydrated Lime now becomes Question 2.1. This is all done by the simple Click and Drag functionality.



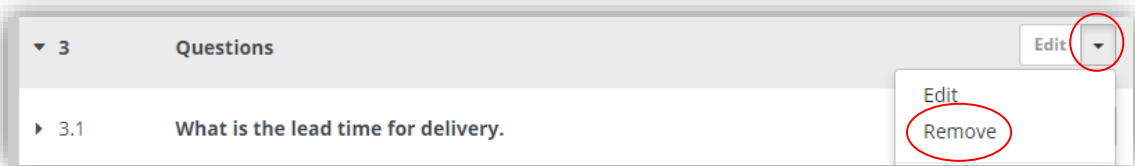
As the Click and Drag happens.

After the click and drag, note the changing from Question 1.3 to Question 2.1

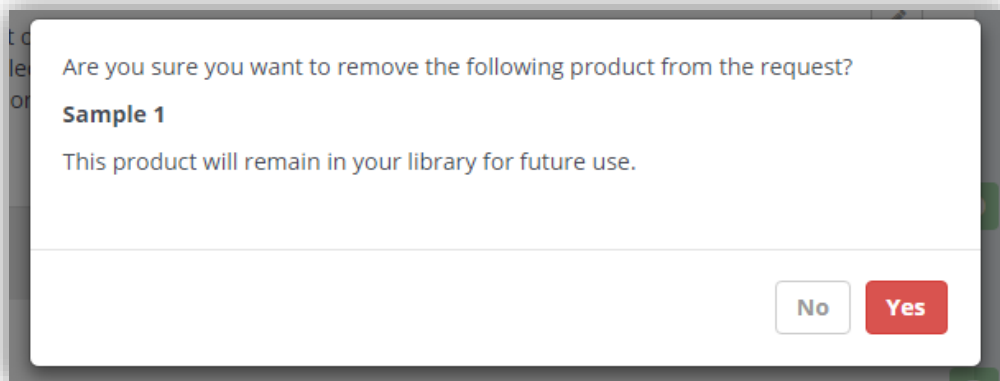
### Removing Content

SourceDogg allows you to remove any Sections, Body of Text's, Questions and Items within the Content.

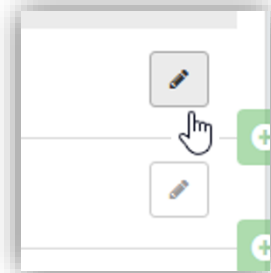
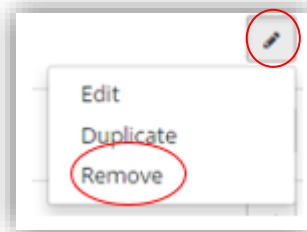
To remove a section, select the drop down beside the 'Edit' button.



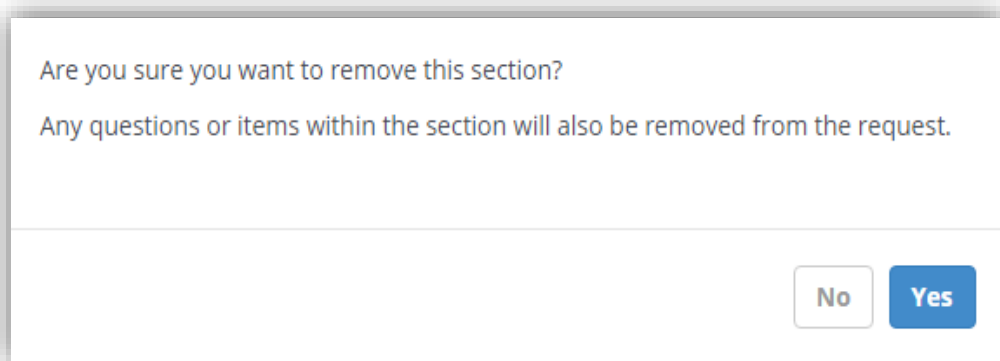
Please note all of the content within the section will be removed.



To remove Items, Questions and Body of Text, look for the Pen Icon. There are three options here, but select 'Remove'.



Removing an Item or Question from the content will remove it from the request, but it will be stored in the library for future use.

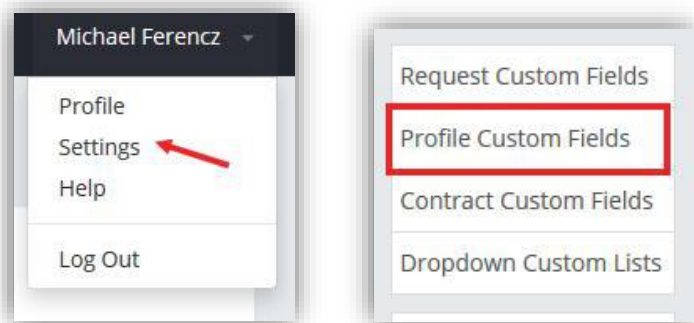


## Auto-tagging and Custom Field updates

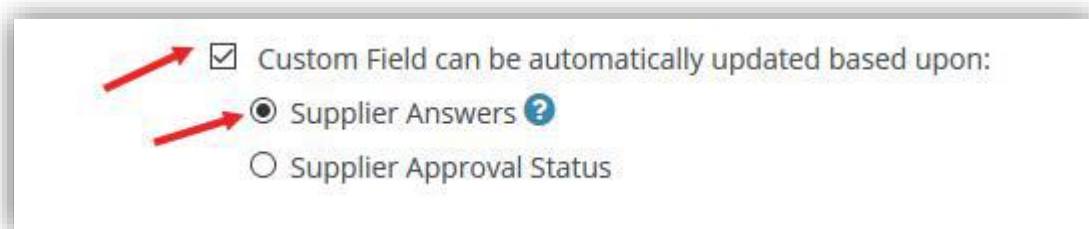
When creating the content of a request, it is possible to set up automatic updates of specific custom fields in the supplier profiles. This will simplify the process of creating content rich supplier profiles and populating it with the relevant information. It is also possible set up automatic supplier tagging based on supplier answers.

### Custom field creation and preparation

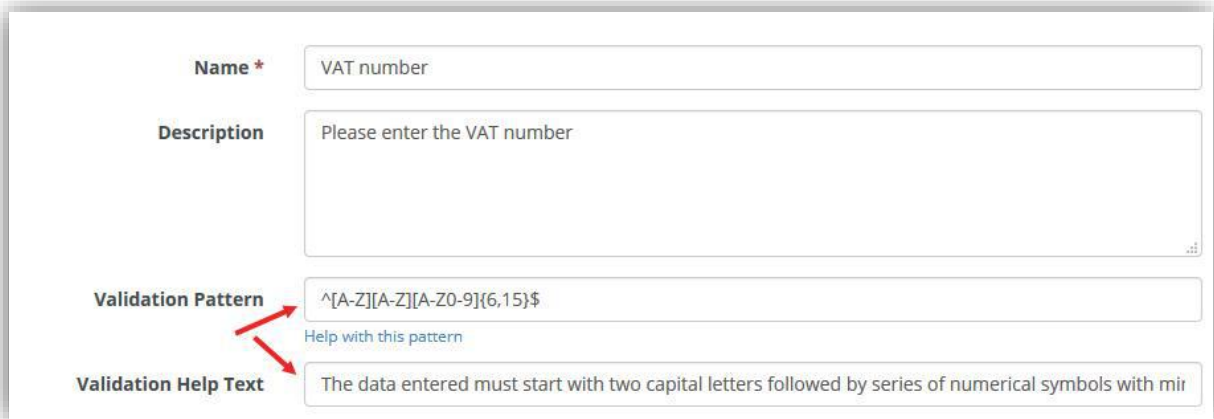
You must create a custom field as a first step. (admin task) Open the settings and select Profile Custom Fields from the menu on the left.



Then click on the “Create Custom Field” button and fill in the required information. In the Permissions settings, select “Custom Field can be automatically updated based upon” and then select the “Supplier Answers” option.



You can also define a validation pattern that will enforce the data entry to match validation, to avoid any data miskeying, errors, or omissions. The validation helptext will also be displayed when linking a custom field to a question in a RFX (this is only valid for Free Text style questions).



**Name \*** VAT number

**Description** Please enter the VAT number

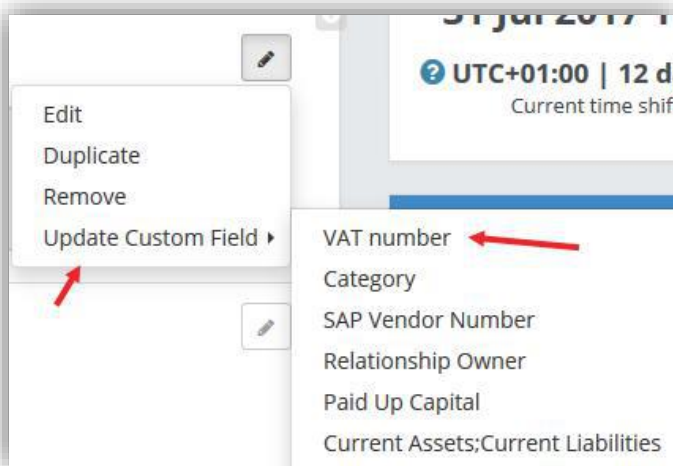
**Validation Pattern** `^([A-Z][A-Z][A-Z0-9]{6,15})$`  
[Help with this pattern](#)

**Validation Help Text** The data entered must start with two capital letters followed by series of numerical symbols with mir

Once saved, this custom field can be selected to be updated when drafting a request.

### Auto-update set up in the request

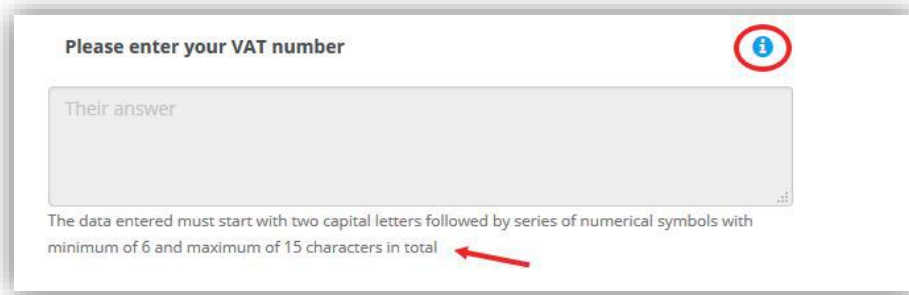
To set a question to update a custom field, create the question as usual (only certain types of questions are supported - Radio Button, Checkbox and Free Text) and then click on the pen icon on the left and select the “Update Custom Field” option. From the dropdown list select the custom field that you would like to be automatically updated.



The question will then be updated, and if the validation pattern was set up for the custom field, the validation help text will be displayed below the question. The blue “i” icon will be added to notify the user which custom field is updated using this question.



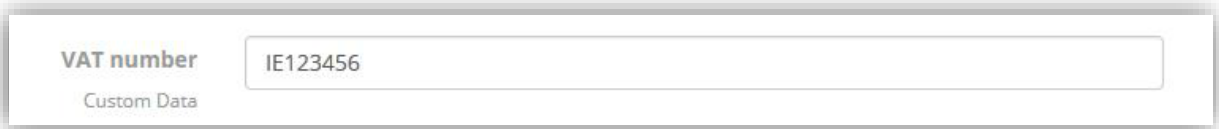
Please note that if you had set a validation pattern on the question before linking it to a custom field, the existing validation pattern will be erased and replaced with the validation pattern set for the custom field. If the custom field did not have a validation pattern then



To remove the settings, click on the pen icon again and select “Remove Custom Field” option.

When a supplier responds to this question, their answer is transferred into their related supplier profile custom field.

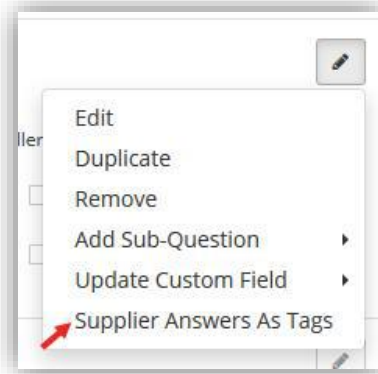
**Please note that data will only be transferred after the request deadline has passed.**



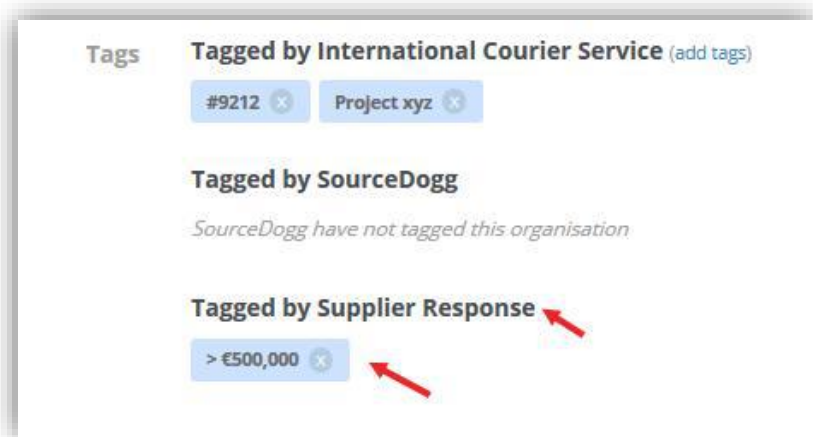
### Automatic tagging

Questions can also be set up a way that answers are added to supplier profile as tags, e.g. product categories, locations, type of company, etc.

Two types of questions support this functionality, Radio Button and Checkbox. First you need to create the question in an RFx, then select the pen icon on the right and select the “Supplier Answers As Tags” option.



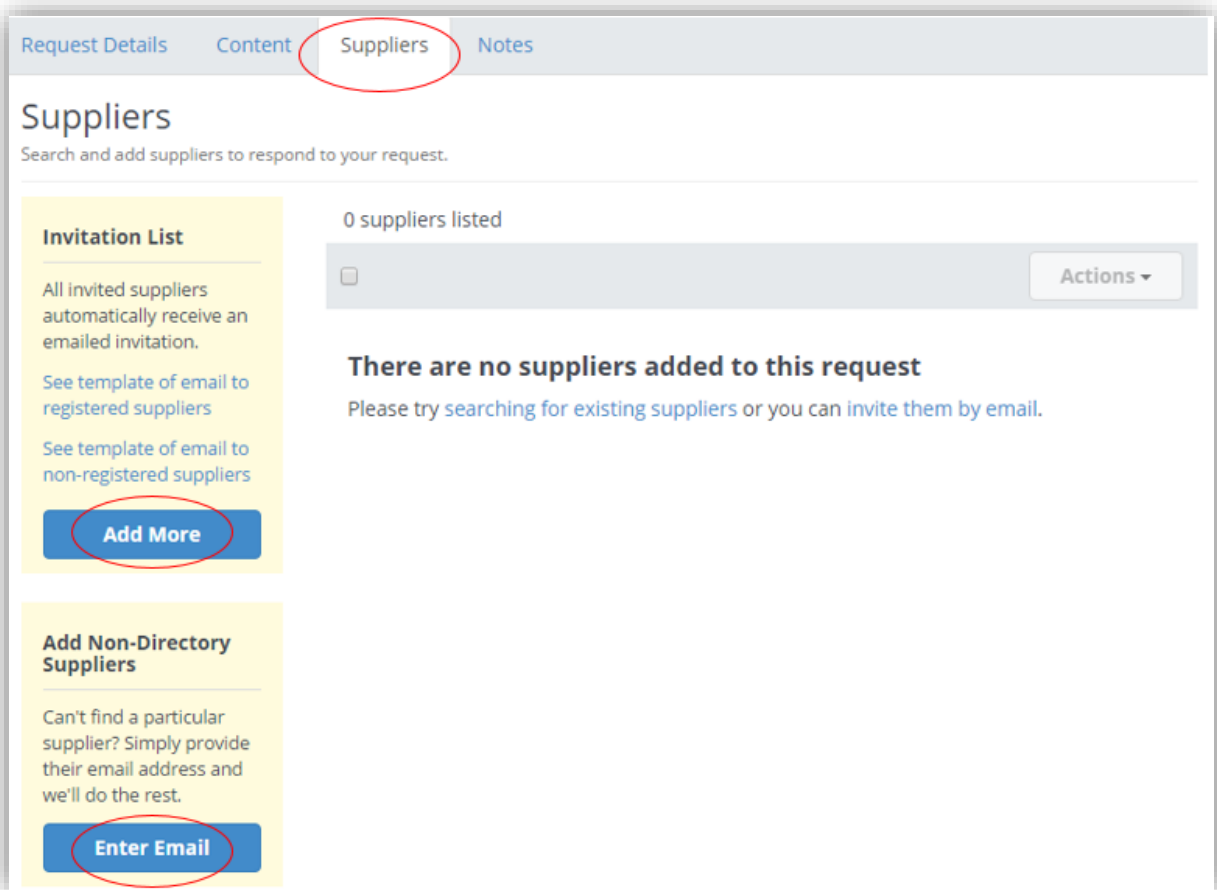
The answers that suppliers select are then added to their profile, as in the below screenshot:



## Suppliers

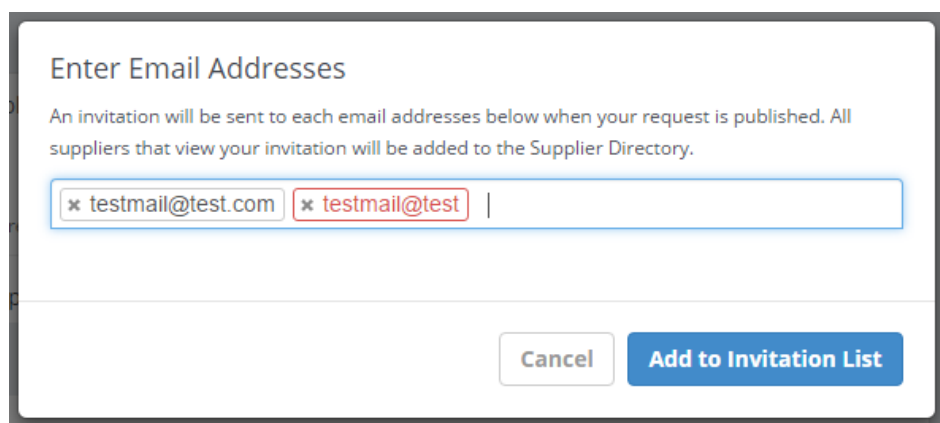
After the Settings and Content have been created, the next step is to add the Suppliers. There are two ways of doing this, by adding the Supplier directly by email, or inviting Suppliers from the SourceDogg Directory.

## Add suppliers via email



In the Suppliers tab, the page looks as below.

Click the 'Enter Email' button and enter any email address that you have for suppliers you would like to invite. SourceDogg detects whether the email is in a valid format or not. Multiple emails can be added.



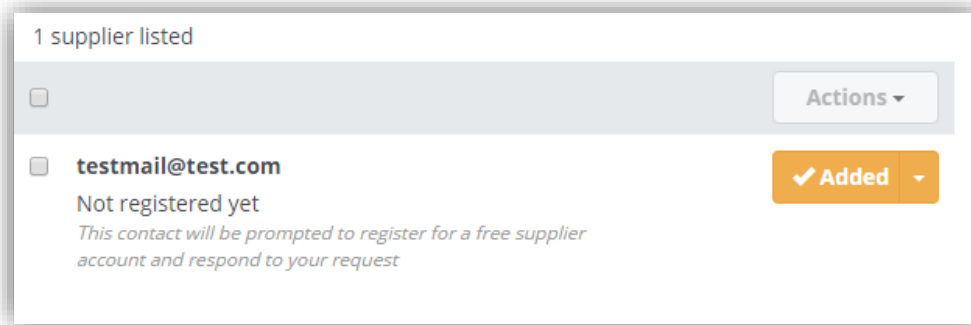
Enter Email Addresses

An invitation will be sent to each email addresses below when your request is published. All suppliers that view your invitation will be added to the Supplier Directory.

✘ testmail@test.com ✘ testmail@test |

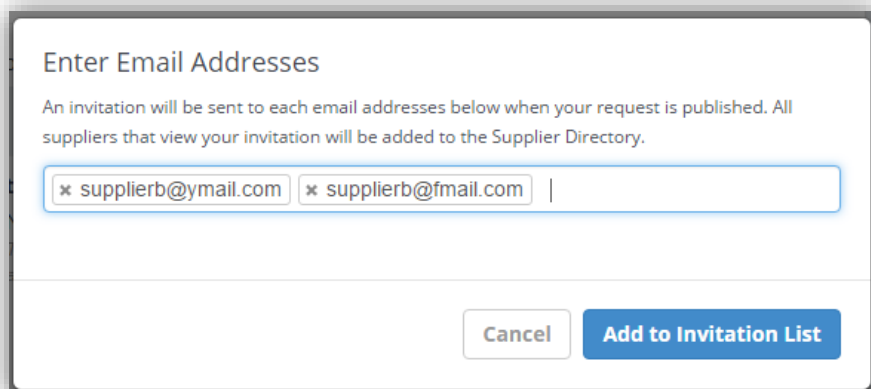
Cancel Add to Invitation List

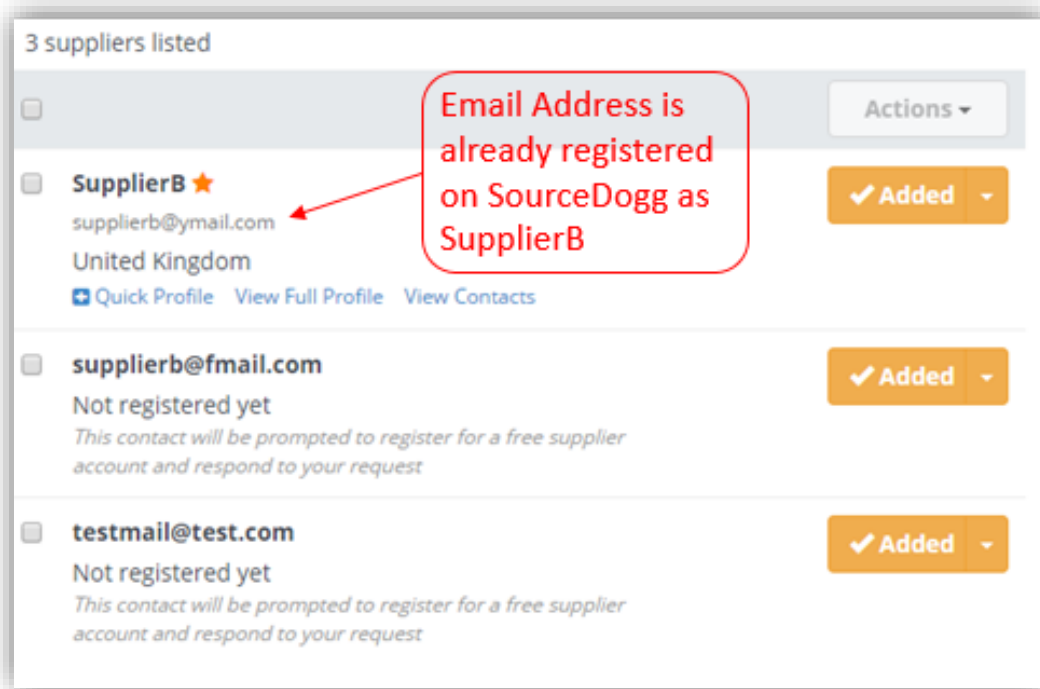
When ready to add the email addresses, click 'Add to Invitation List'. The valid email addresses will then be added to the request.



As can be seen above the email: [testmail@test.com](mailto:testmail@test.com) is not registered on SourceDogg.

However, if an email address of a registered SourceDogg user is entered, the name of account will be shown in the Suppliers tab.

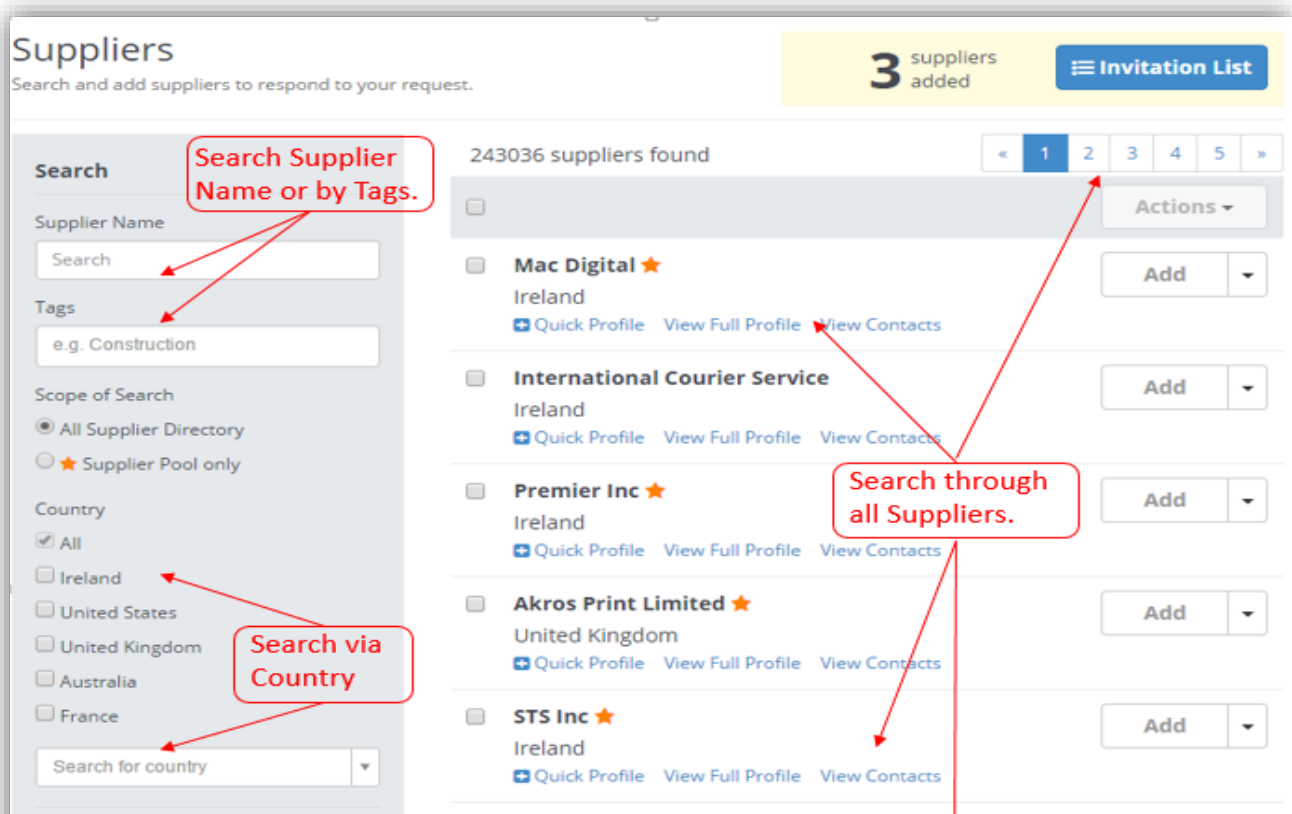




### Invite from Directory

The SourceDogg Supplier Directory has a global supplier base of 250,000+ Suppliers. Any of these Suppliers can be added into a Request. SourceDogg search facility allows the User to search through and select Suppliers out of this database.

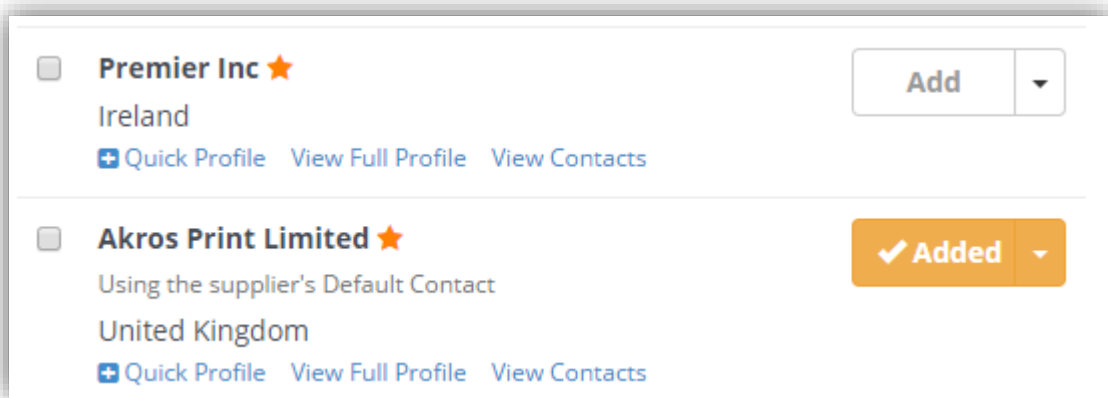
To search through the directory of Suppliers. Select 'Add More' on the Suppliers page and the below screen appears.



### Browse all Suppliers

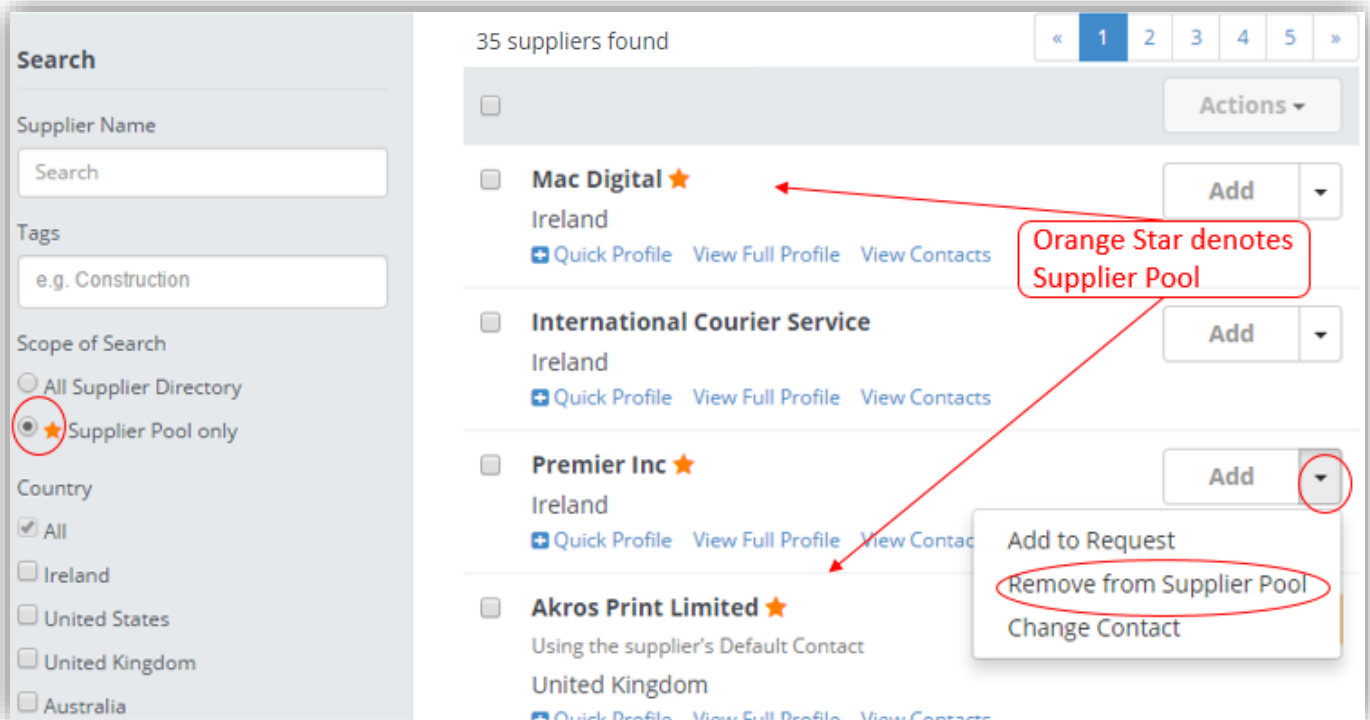
To browse all the suppliers on SourceDogg simply scroll through them, and advance through the pages on the top right. Using the Search functions, such as Supplier Name, Tags and Country allow you to find any of SourceDogg's Suppliers.

To add the Supplier of your choosing to the request, simply click 'Add' and they then will be 'Added' to the Invitation list.



### Supplier Pool

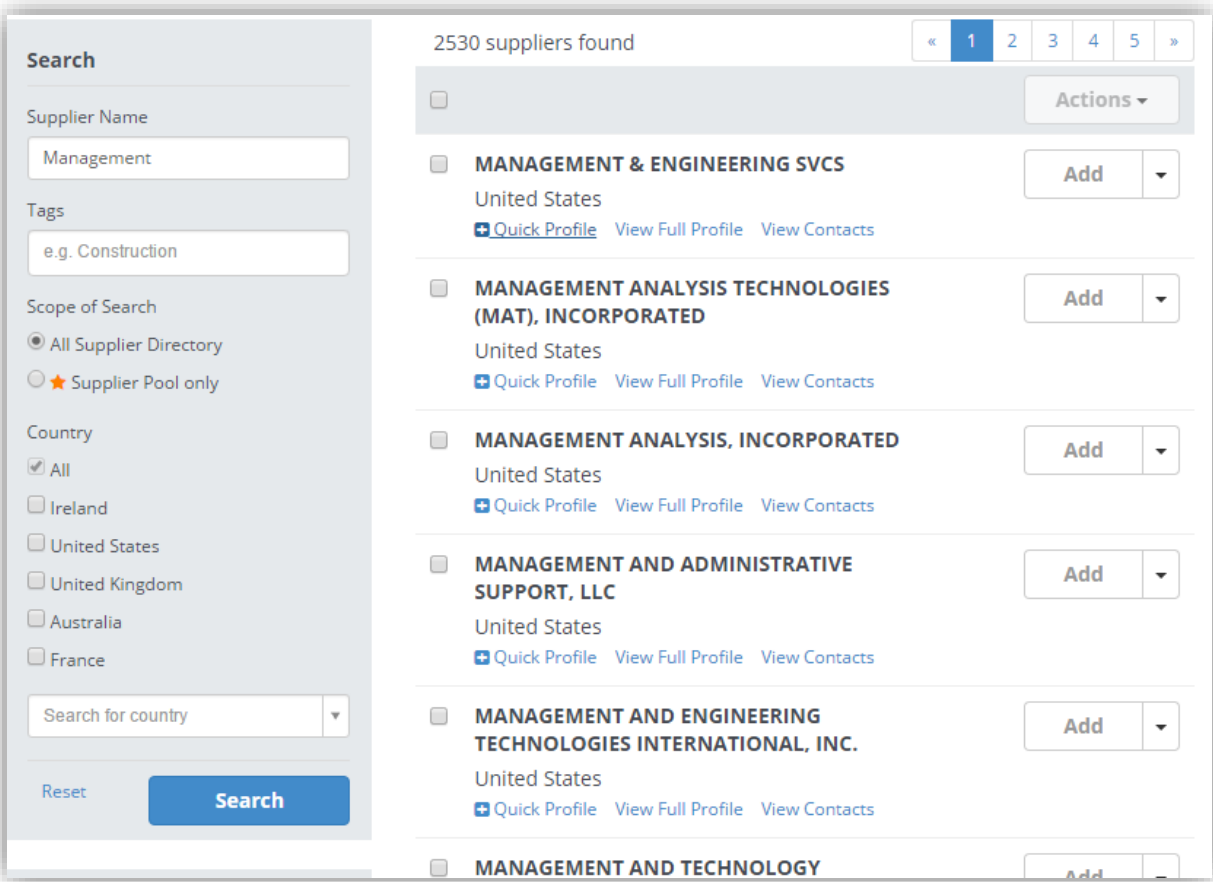
SourceDogg enables the User to group their primary suppliers in the Supplier Pool. The Supplier Pool then allows quick access to these suppliers when selecting a Supplier to invite to a Request.



The User can Add or Remove the Supplier to the Supplier Pool by using the drop down beside each supplier. This is the best way of identifying Key Suppliers and managing them separately from other Suppliers.

*Browse by supplier name*

Using the Supplier Name search allows the user to search through the database. See an example below, using the word 'Management' the total supplier listed on SourceDogg with 'Management' in their name is 2530. This search can then be refined further by choosing a specific Country or tags.



The screenshot shows a search interface with the following elements:

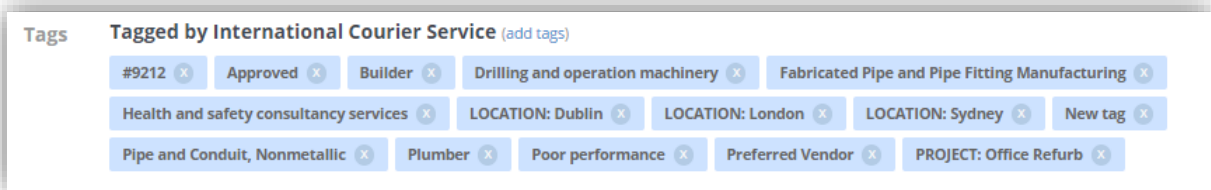
- Search Panel (Left):**
  - Supplier Name: Management
  - Tags: e.g. Construction
  - Scope of Search: All Supplier Directory (selected), Supplier Pool only
  - Country: All (checked), Ireland, United States, United Kingdom, Australia, France
  - Buttons: Reset, Search
- Results Panel (Right):**
  - 2530 suppliers found
  - Navigation: « 1 2 3 4 5 »
  - Supplier List:
    - MANAGEMENT & ENGINEERING SVCS** (United States) - Add
    - MANAGEMENT ANALYSIS TECHNOLOGIES (MAT), INCORPORATED** (United States) - Add
    - MANAGEMENT ANALYSIS, INCORPORATED** (United States) - Add
    - MANAGEMENT AND ADMINISTRATIVE SUPPORT, LLC** (United States) - Add
    - MANAGEMENT AND ENGINEERING TECHNOLOGIES INTERNATIONAL, INC.** (United States) - Add
    - MANAGEMENT AND TECHNOLOGY** - Add

*Filter your searches using tags*

Here Tags are used to categorise and label Suppliers. This is managed in the Supplier Management section.

Tags are completely internal and all depend on how the User manages the Tags. Examples of Supplier tagging could be as follows.

Searching suppliers by Tags, allows you to search through any Supplier that has been Tagged by the



User's Organisation under that specific Tag. To refine further, multiple Tags can be searched for.

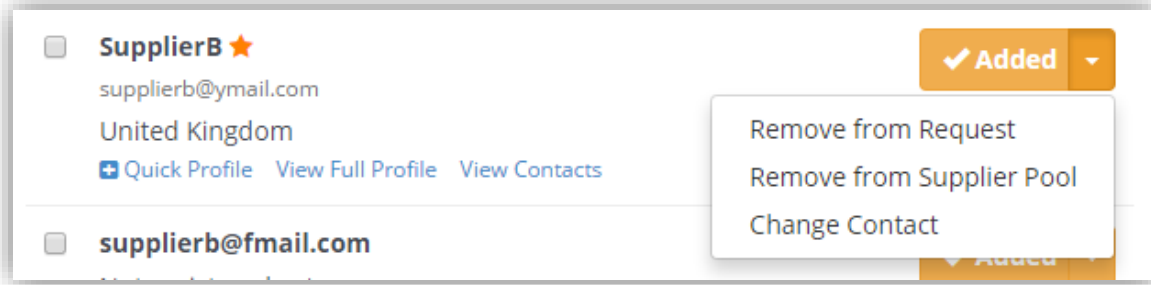
See below for an example.

www.sourcedogg.com



## Remove a supplier

To remove a Supplier from a Request before it's been published, click the drop down arrow beside the Orange 'Added' Tick. This drop down allows the User to Remove the Supplier from the Request,

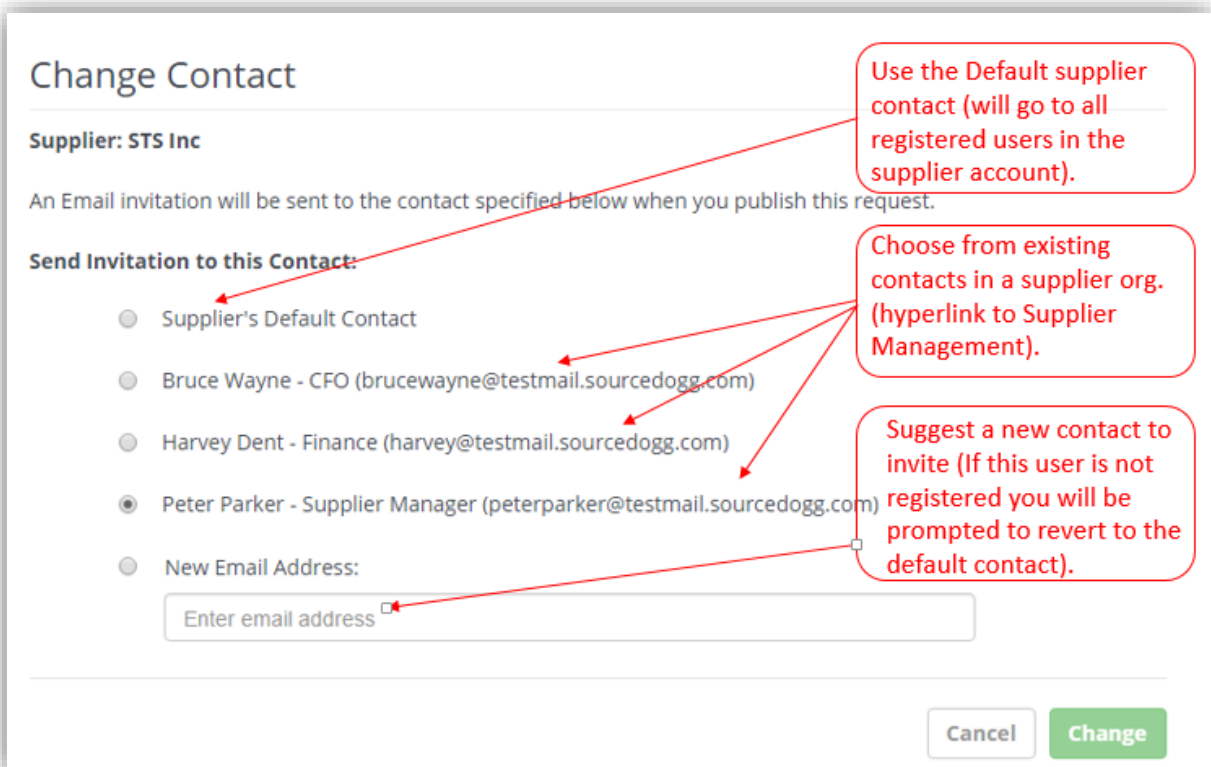


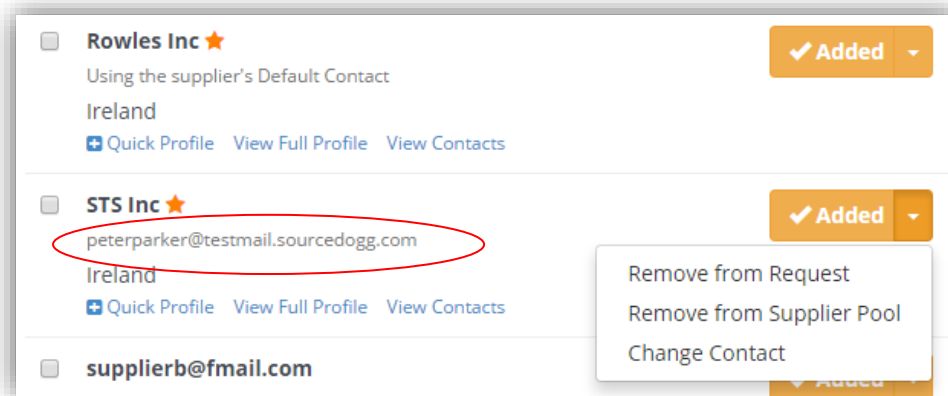
from the Supplier Pool or to Change the Contact.

Click 'Remove from Request' and the added supplier will be removed.

## Change contact

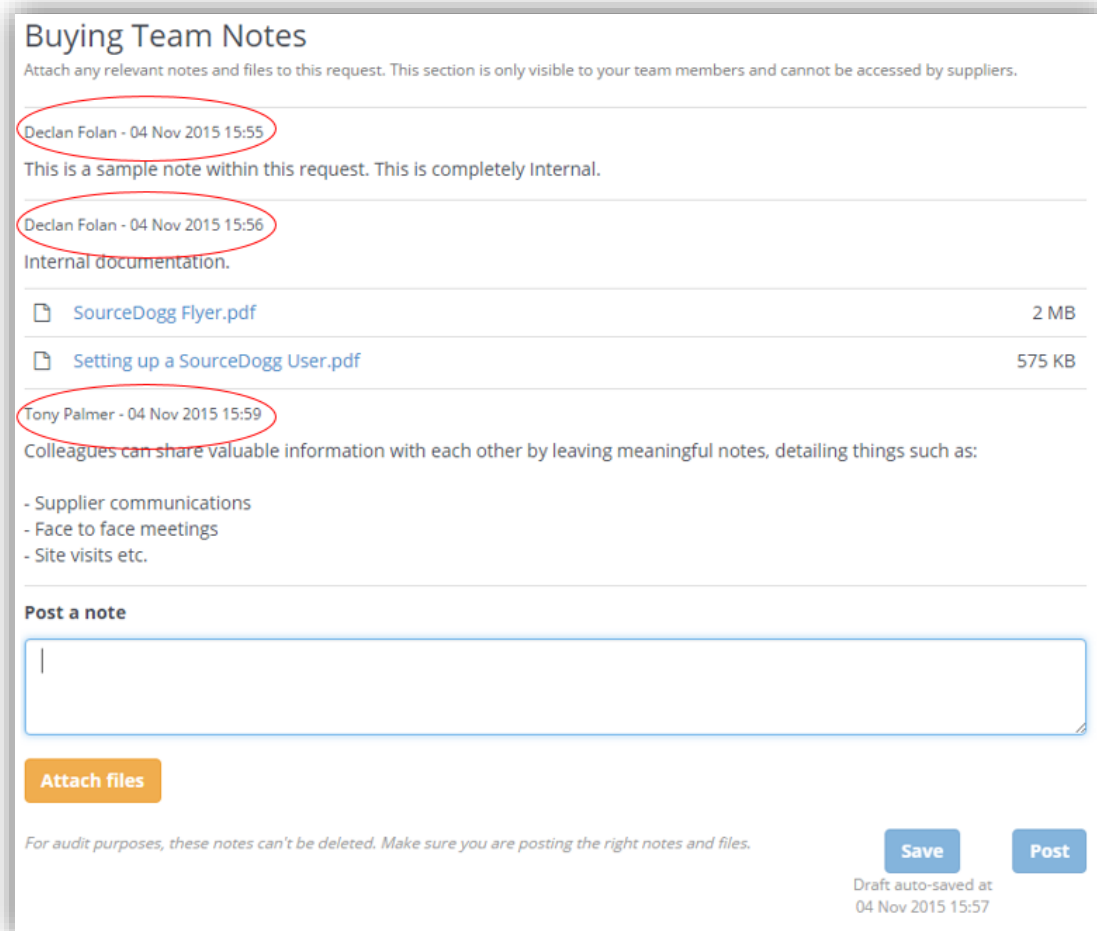
The change contact option allows the User to select the Suppliers default Contact, a choice of Contacts, or to suggest a new Contact. If a Contact is not selected, then all Supplier Users will receive an invitation to request. Selecting an 'Account Manager' or 'Head of Sales', for example, may be more appropriate. This feature will allow the User to send the request to one User within an organisation.





## Notes

SourceDogg’s Notes Section allows member of the request team to make Internal Notes if necessary. Files can also be attached here. Any Note recorded cannot be removed. This is for Audit purposes. The SourceDogg Note feature allows the User to ‘Save’ the Note as a draft before finalising it. Each Note is Date and Time Stamped as well as the User who created the note is recorded.



## Submit for Approval

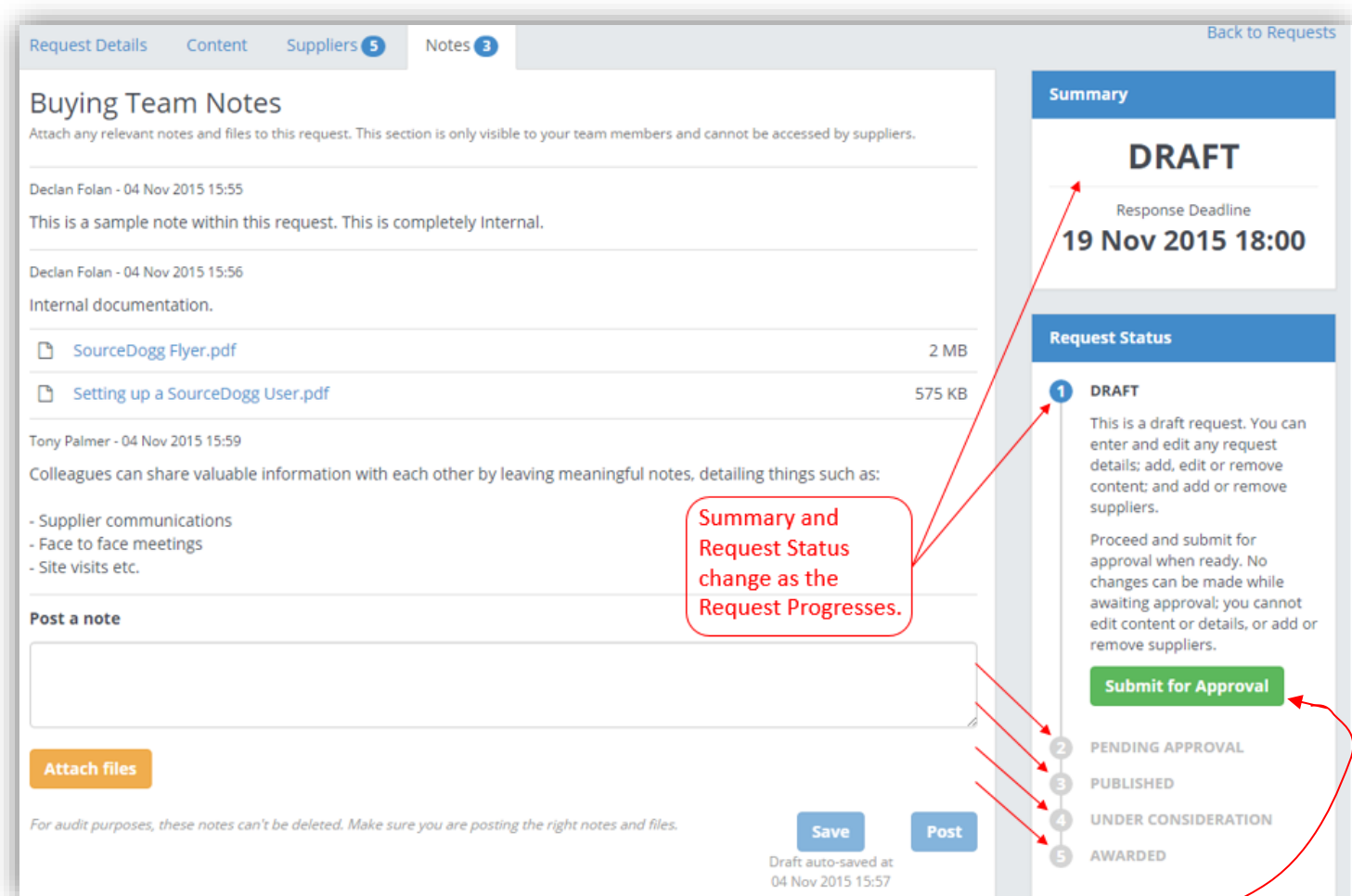
In the [Request Settings](#) Section, Approval Requirement is an option to have 'On' or 'Off'.

- **Approval Requirements:** Selecting Approval Requirement requires approval from a user with Approver status before the request can be published. This setting facilitates oversight of your organisation's sourcing process.

An 'Approver' is assigned in the User Settings (Basic) and when adding to a Request.

## Approval, Summary & Status

The summary section of the RFX event shows "Draft" status up until this point. This changes as the different stages of the Request progresses. Summary serves as indicator for stage in which the Request is at that particular moment.



Request Details Content Suppliers 5 Notes 3 Back to Requests

### Buying Team Notes

Attach any relevant notes and files to this request. This section is only visible to your team members and cannot be accessed by suppliers.

Declan Folan - 04 Nov 2015 15:55  
This is a sample note within this request. This is completely Internal.

Declan Folan - 04 Nov 2015 15:56  
Internal documentation.

- SourceDogg Flyer.pdf 2 MB
- Setting up a SourceDogg User.pdf 575 KB

Tony Palmer - 04 Nov 2015 15:59  
Colleagues can share valuable information with each other by leaving meaningful notes, detailing things such as:

- Supplier communications
- Face to face meetings
- Site visits etc.

Post a note

Attach files

For audit purposes, these notes can't be deleted. Make sure you are posting the right notes and files.

Save Post

Draft auto-saved at 04 Nov 2015 15:57

### Summary

# DRAFT

Response Deadline  
**19 Nov 2015 18:00**

### Request Status

- DRAFT**  
This is a draft request. You can enter and edit any request details; add, edit or remove content; and add or remove suppliers.  
Proceed and submit for approval when ready. No changes can be made while awaiting approval; you cannot edit content or details, or add or remove suppliers.  
**Submit for Approval**
- PENDING APPROVAL
- PUBLISHED
- UNDER CONSIDERATION
- AWARDED

Once the User is satisfied with the Request to be Approved, click 'Submit for Approval'.

This will then generate a Summary page with all the Request Information. This is for the User to Review before finally submitting for Approval.

## You are about to submit a Request for Information for approval

Please review the following information before proceeding


<b>Title</b>	Test up to 25	<div style="border: 1px solid #ccc; padding: 5px; background-color: #f3f3f3; margin-bottom: 5px;"><b>Response Deadline</b></div> <div style="background-color: #27ae60; color: white; padding: 10px; font-weight: bold; font-size: 1.2em;">19 Nov 2015 18:00</div>
<b>Team Members</b>	3 (1 Reader, 0 Editors, 2 Approvers)	
<b>Scorers</b>	1	
<b>Content</b>	3 Sections, 8 Questions, 4 Items	
<b>Suppliers Added</b>	5	
<b>Public Invitation</b>	Selected	
<b>Approval Requirement</b>	Selected	
<b>Response Lock</b>	Unselected	
<b>Score System</b>	Unselected	
<b>Supplier Q&amp;A</b>	Selected	

Return to Request
Submit for Approval

### Approver notified

When a Request is submitted for Approval, all “Approver” users within this RFX will then receive an email notification.

To  George@demosupport.sourcedogg.com

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

George

The following request for information is submitted for approval:

*Sample Request User Guide*

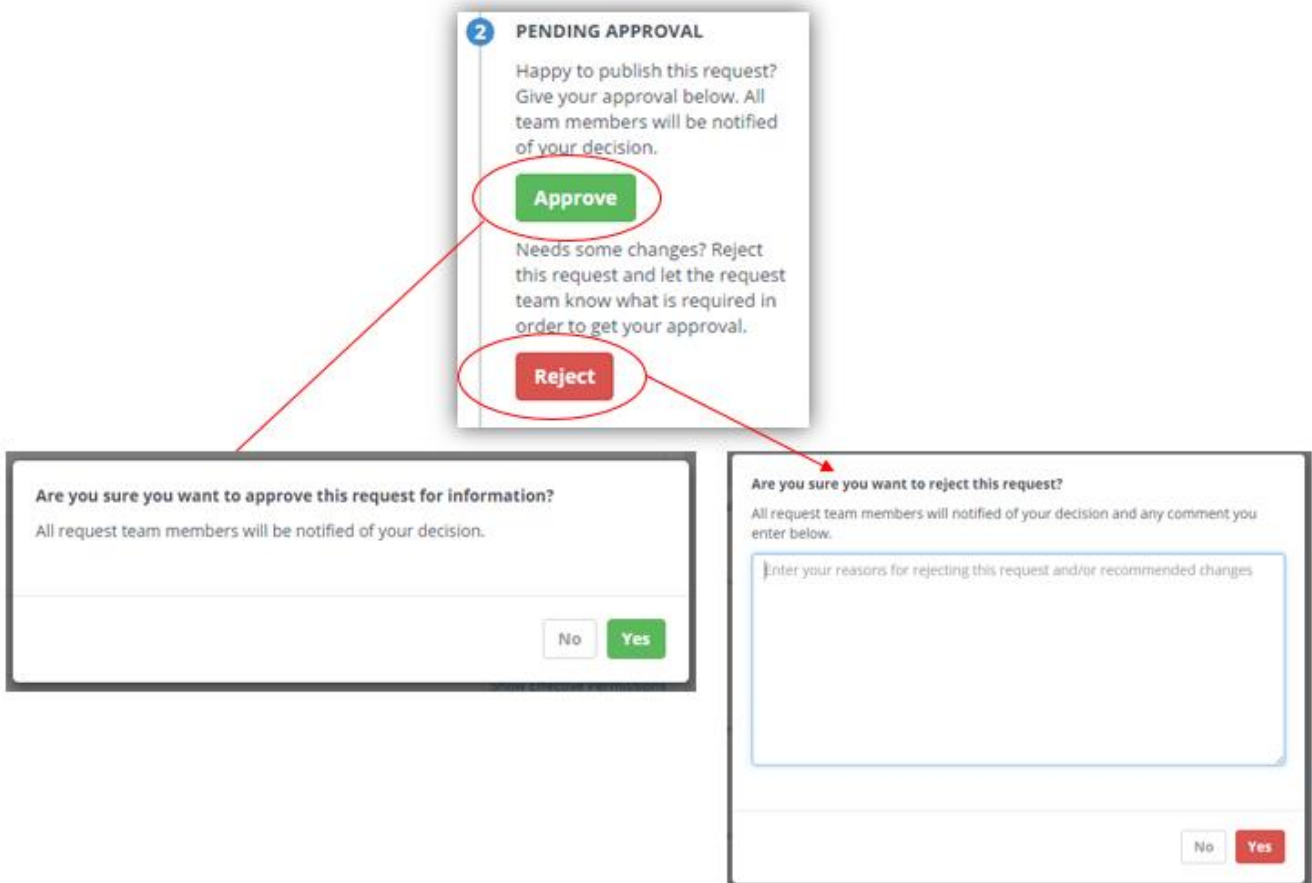
[Review the submitted request](#) and approve for publication, or reject it if changes are required.

Please note that approval or rejection requires just one team member with approver status.

Following the hyperlink in the email, the Approver can get direct access to the request and commence the review process before deciding whether to 'Approve' or 'Reject'.

### Approve / Reject

Approving the Request will allow for the Request to be Published. Rejecting a Request will enable the Approver to make comments on reasons why the Request has been Rejected. This will generate email notification to all team members with visibility of the Reject notes from the Approver. When the required changes are made, the Approval process begins again.



**2 PENDING APPROVAL**

Happy to publish this request?  
Give your approval below. All team members will be notified of your decision.

**Approve**

Needs some changes? Reject this request and let the request team know what is required in order to get your approval.

**Reject**

**Are you sure you want to approve this request for information?**  
All request team members will be notified of your decision.

No Yes

**Are you sure you want to reject this request?**  
All request team members will notified of your decision and any comment you enter below.


Enter your reasons for rejecting this request and/or recommended changes

No Yes

### Publish

If 'Approval' in Request Settings is 'Off', or the Request has been through the Approval Process, then the request is ready to be published.

**Publish**

By clicking the  button, the User will be given an overview of the Request including the deadline being highlighted.

## You are about to publish a Request for Information

Please review the following information before publishing

<b>Title</b>	Sample Request User Guide	<div style="border: 1px solid #ccc; padding: 5px; background-color: #f3f3f3; margin-bottom: 5px;"><b>Response Deadline</b></div> <div style="background-color: #27ae60; color: white; padding: 10px; font-weight: bold; font-size: 1.2em;">19 Nov 2015 18:00</div>
<b>Team Members</b>	3 (1 Reader, 0 Editors, 2 Approvers)	
<b>Scorers</b>	1	
<b>Content</b>	3 Sections, 8 Questions, 4 Items	
<b>Suppliers Added</b>	5	
<b>Public Invitation</b>	Selected	
<b>Approval Requirement</b>	Selected	
<b>Response Lock</b>	Unselected	
<b>Score System</b>	Unselected	
<b>Supplier Q&amp;A</b>	Selected	

What actions are possible after publishing?

Return to Request
Publish

Once the request is Published, all Users included on the Request and all Invited Suppliers will be notified of the Publication of this Request by email.

George

The following request for information is published:

*Sample Request User Guide*

[View the request](#) to check responses, invite more suppliers or change the Public Invitation setting.

The Request is now published. See the Published Request section for the next steps.

Request Details
Content
Suppliers **5**
Q&A
Notes
Back to Requests

### Suppliers

Search and invite suppliers to respond to your request.

**Invitation List**

All invited suppliers automatically receive an emailed invitation.

See template of email to registered suppliers

See template of email to non-registered suppliers

Invite More

**Invite Non-Directory Suppliers**

Can't find a particular supplier? Simply provide their email address and we'll do the rest.

Enter Email

5 suppliers listed

			Actions
<input type="checkbox"/>			
<input type="checkbox"/>	<p><b>Akros Print Limited</b> ★</p> <p>Using the supplier's Default Contact</p> <p>United Kingdom</p> <p><a href="#">Quick Profile</a> <a href="#">View Full Profile</a> <a href="#">View Contacts</a></p>	<p><b>Invited</b></p> <p>04 Nov 2015 16:57</p>	⚙️
<input type="checkbox"/>	<p><b>Rowles Inc</b> ★</p> <p>Using the supplier's Default Contact</p> <p>Ireland</p> <p><a href="#">Quick Profile</a> <a href="#">View Full Profile</a> <a href="#">View Contacts</a></p>	<p><b>Invited</b></p> <p>04 Nov 2015 16:57</p>	⚙️
<input type="checkbox"/>	<p><b>STS Inc</b> ★</p> <p>peterparker@testmail.sourcedogg.com</p> <p>Ireland</p> <p><a href="#">Quick Profile</a> <a href="#">View Full Profile</a> <a href="#">View Contacts</a></p>	<p><b>Invited</b></p> <p>04 Nov 2015 16:57</p>	⚙️
<input type="checkbox"/>	<p><b>supplierb@fmail.com</b></p> <p>Not registered yet</p> <p><i>This contact was prompted to register for a free supplier account and respond to your request</i></p>	<p><b>Invited</b></p> <p>04 Nov 2015 16:57</p>	⚙️
<input type="checkbox"/>	<p><b>testmail@test.com</b></p> <p>Not registered yet</p> <p><i>This contact was prompted to register for a free supplier account and respond to your request</i></p>	<p><b>Invited</b></p> <p>04 Nov 2015 16:57</p>	⚙️

**Summary**

PUBLISHED

Response Deadline

19 Nov 2015 18:00

**Request Status**

- 1 DRAFT
- 2 PENDING APPROVAL
- 3
- 4 UNDER CONSIDERATION
- 5 AWARDED

The request has been published. You can continue inviting suppliers to respond, extend the response deadline at any time, and select or deselect the Public Invitation setting as required.

[Export](#) | [Clone](#) | [Cancel](#)