Sourcing Instructions for Suppliers: Assessments
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Table of Contents

1 Accessing Assessments ..........................................................................................................................1
  1.1 Access through Email ..........................................................................................................................1
  1.2 Access through the Worklist ...............................................................................................................1
  1.3 Access through the Sourcing Home Page ..........................................................................................2

2 Responding to Assessments ..................................................................................................................4
  2.1 Acknowledging Participation ..............................................................................................................4
  2.2 Create Response ...................................................................................................................................4
    2.2.1 Respond by Spreadsheet ...............................................................................................................5

3 Support ....................................................................................................................................................7
  3.1 Contact Information ............................................................................................................................7
1 Accessing Assessments

If a Bechtel Buyer wants to obtain more information about your company, they have the option to send you an assessment.

1.1 Access through Email

1. Access the email notification you received from Bechtel EBS Workflow. The subject of the email begins with “Action Required: You are invited: Assessment”. Select Assessment Details to view the assessment before acknowledging intent to participate. You may select Yes or No to indicate whether your company intends to participate. Selecting “Yes” or “No” within the email will trigger a response email.

Note: Do not respond to this email in any other manner as it is a “no-reply” mailbox that is not monitored.

1.2 Access through the Worklist

1. Click Worklist, the bell icon, and select the assessment.

a. If you cannot see the notification, select Go To Full Worklist. In the View dropdown, select All Notifications and Go. The assessment should appear. Select the subject to open the notification, or select the box to the left and Open.
2. Click **Assessment Details** to view details of the assessment.

![Assessment Details](image)

1.3 **Access through the Sourcing Home Page**

1. Access the **Sourcing Home Page** through the menu icon, located in the left corner of the page.

![E-Business Suite](image)

**Note:** If you do not see the **Sourcing Supplier** responsibility when clicking the menu icon, please contact your Bechtel buyer or procweb@bechtel.com to grant you the appropriate access.
2. This will take you to the Sourcing Home Page. Select the **Assessments** tab. To view an assessment, select its **Assessment Number**.

![Assessments Tab](image)

- **Your Active and Draft Responses** – these are the assessments your company is actively participating in. Once you acknowledge participation in, or create a response for an assessment, it will reside under this first section. Not all assessments will be visible – to view all your active and draft responses click **Full List**.

- **Your Company’s Open Invitations** – these are the assessments you have been invited to, but have not responded to.

- **Quick Links**, you can manage draft responses and view active responses. By selecting **Drafts** under **Manage**, you can search draft responses by fields such as assessment number and who created the response. **Active** under **View Responses** will take you to a page of active and draft responses, or responses that have not been awarded, rejected, or disqualified.

**Note**: If you cannot find the assessment you are looking for, use the **Search Open Assessments** bar at the top of the page to search for the assessment. If you still cannot locate it, please reach out to your Bechtel buyer for assistance.
2 Responding to Assessments

After you receive an invitation to participate in an assessment, you can acknowledge your participation and create a response. Follow the instruction below to acknowledge participation and create a response.

2.1 Acknowledging Participation

1. Review the Header, Lines, and Controls tabs within the assessment, and select Acknowledge Participation from the Actions dropdown. Then click Go.

2. Select Yes or No. You may include a Note to Buyer. Then, click Apply.

Note: If you respond “No”, your Bechtel buyer may remove your company from the assessment. If you respond “No” by mistake, please contact your Bechtel buyer for assistance.

2.2 Create Response

1. To respond, select Create Response from the Actions dropdown and Go.

2. When creating a response, you will land on the Header tab. On the top section, you can include a Note to Buyer, and add attachments.

3. To answer the questions, simply enter/type an applicable response value (text, date, number, or URL) or select a value from the dropdown list. Click Continue when you are finished entering responses.

Note: You will receive an error message if you enter an invalid value and/or do not answer a question that is marked required. Be sure to respond to all questions in the correct response value based on the context of the question, as well as answer all questions that are asked of you, if applicable.

4. Review your responses ensuring that they are accurate, then Submit the assessment.
2.2.1 Respond by Spreadsheet

The **Respond by Spreadsheet** functionality allows you to respond by uploading an excel document. You will begin by exporting a file then modifying it and subsequently uploading it back into the system. Quote by Spreadsheet is most commonly used when creating a quote with hundreds or thousands of line items.

1. Select **Create Response** from the **Actions** dropdown and **Go**.
2. Click **Respond by Spreadsheet**.
3. First you must export the spreadsheet. To do this, select the desired format and click **Export**.

4. The Excel file will download onto your computer. **Open** the file in Excel, **Enable Content**, enter your response values and any other necessary information, then **Save** the Excel spreadsheet. **The yellow cells are mandatory fields and the green cells are optional**.

**Note**: When downloading the Excel spreadsheet, a zip file will be created. This zip file contains the exported
spreadsheet as well as a help document. If you have any trouble using quote by spreadsheet, open the "RFQ-QuoteHelp.htm" document that was downloaded onto your computer.

5. Navigate back to the Respond by Spreadsheet page. Select Browse and open the saved excel file. Then click Import.

6. Confirm that the information was uploaded correctly and click Continue.

7. Review your response to confirm that you have provided all the necessary information and it is accurate. Once ready, click Submit or Save Draft.

**IF THE SPREADSHEET DOES NOT UPLOAD:**
It is likely that all responses did not follow the template's "rules." Check for the following issues:

1) **Mandatory fields have not been completed:**

   Unless the requirement is a dependent requirement and the response for the parent requirement does not match, each requirement **must have a Response Value** (unless the question says it is “Supplier Optional”)

2) **The correct format was not used for a response:**

   For example, Text is not a Date Value.

   If a question is mandatory and you do not know the answer, reach out to your Bechtel Buyer and make an educated guess in the correct Response Value. Typically, responses to assessments have minimal effect on future awarding of bids.

3) **Responses were provided for dependent requirements when the parent response is something else:**
If the answer to the Parent Requirement Number matches the Response for Parent Requirement, a response is necessary (as shown by the orange and blue fields). If the Parent Requirement Number does NOT match the Response for Parent Requirement, then there should be no response (as shown by the green fields).

### 3 Support

#### 3.1 Contact Information

If you have questions or need more information on the registration/pre-qualification process, please email us at procweb@Bechtel.com or reach out to your Bechtel person of contact.