



**Participate in events as a team with your colleagues**

## 3. Participate in events as a team with your colleagues

### [3.1 Collaborate using Excel](#)

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## 3.1 Collaborate using Excel



## 3.1 Collaborate using Excel

### ANSWERING RFx EVENTS USING EXCEL OR SEVERAL SUPPLIER USERS

#### Options summary

There are two ways how multiple users can work in one event:

#### ANSWERING QUESTIONS USING EXCEL

- You can [export questions directly to the Excel](#) from the event in Ariba format (click **Download Event Content** under **Review Event Details**) and distribute this document to colleagues for collaboration.
- Invited user can import the response document back into the event and submit it when completed.

#### USING SEVERAL SUPPLIER USERS

- Project Buyer from tesa side can create several contact persons & invite them all to the event as one response team
- You [can create new users in your account and share access to tesa events to these users](#).

**NOTE:** Multiple people cannot log in with the same username at one time. That causes an error that rejects all users from the system.

# ANSWERING QUESTIONS USING EXCEL



# 3.1 Collaborate using Excel

## ANSWERING QUESTIONS USING EXCEL

### Intend to Participate

#### Intend to Participate

#### Response from Excel

New documents waiting for your response are stored at Events tile with Status **Open**.

Open the RFI to answer the questions

1. Click on the **name of the event RFI**.

The event details opened. There is a checklist what should be done.

2. To start to work on the project click **Intend to Participate**.

The screenshot shows the SAP Ariba interface for 'TESA - TEST'. It includes a navigation bar with 'SAP Ariba Proposals and Questionnaire', 'Enterprise Account', and 'TEST MODE'. A user profile 'LB' is visible in the top right, circled with a red '1'. The main content area is divided into several sections: 'Tesa - TEST Requested Profile' with a message about completed fields; 'Public Profile Completeness' with a 35% progress bar and a description field; 'Events' table with columns for Title, ID, End Time, and Event Type; and a 'Checklist' on the left with items like 'Review Event Details', 'Select Lots', and 'Submit Response'. At the bottom, there are three buttons: 'Intend to Participate' (highlighted with a red box), 'Decline to Participate', and 'Print Event' (circled with a red '2'). The 'Intend to Participate' button is also highlighted with a red box. The 'Events' table contains the following data:

Title	ID	End Time	Event Type
▶ Status: Completed (31)			
▼ Status: Open (3)			
RFI	Doc431668218	6/19/2020 11:31 AM	RFI
tPS - LeverX - Corporate services (RFI)	Doc352561294	6/18/2020 3:24 PM	RFI

Below the table, there is a section for 'Event Overview and Timing Rules' with details like Owner: LeverX Third-Party, Currency: European Union E, Event Type: RFI, Commodity: Facility management 11000000, Publish time: 6/9/2020 11:31 AM, and Due date: 6/19/2020 11:31 AM.

# 3.1 Collaborate using Excel

## ANSWERING QUESTIONS USING EXCEL

### Download Excel



Intend to Participate

Response from Excel

After the Lots are chosen the survey provided by the Buyer can be answered:

3. Click **Excel Import**.

On the page Import response from Excel

4. Click **Download content** to get excel document with questions.

The screenshot shows the Ariba Sourcing interface for a specific event (Doc431668218 - RFI). The main area is titled 'All Content' and contains a checklist with three items: '1. Review Event Details', '2. Submit Response', and '3. Main locations (headquarters, production plants, etc.)'. Below the checklist, there are four steps for importing an Excel response. Step 1 is 'Click "Download Content" to download the Excel spreadsheet. Skip this step if you wish to import an existing Excel spreadsheet.' The 'Download Content' button is highlighted with a red box. Step 2 is 'Declare your intention to respond and enter your response in the Excel spreadsheet and save the file to your computer.' Step 3 is 'Locate the saved Excel file on your computer using the Browse button.' The 'Choose File' button is highlighted with a red box. Step 4 is 'Click Upload to import the contents of the Excel file to your event.' The 'Upload' button is highlighted with a red box. In the top right corner, the 'Excel Import' button is highlighted with a red box. A red circle with the number 3 is around the top right navigation area, and a red circle with the number 4 is around the 'Upload' button.



# 3.1 Collaborate using Excel

## ANSWERING QUESTIONS USING EXCEL

### Download Excel



Intend to Participate

Response from Excel

Open the downloaded document by

5. Click on the **name of the document**.

**Note:** this step might vary depending from browser.

Ariba Sourcing

< Go back to Tesa - TEST Dashboard

Desktop File System 5

### Import Response from Excel

Done

This page allows you to export and import event content and submit bids. It is not intended to add attachments. To add attachments, return to the previous page and click the link to browse for an attachment.

**Step 1.** Click "Download Content" to download and review your event in an Excel Spreadsheet.  
Skip this step if you wish to import a previously downloaded file. If you want to start over, click "Download Original Excel Bid Sheets".

Download Content

**Step 2.** Declare your intention to respond and enter your response in the Excel spreadsheet and save the file to your computer.

**Step 3.** Locate the saved Excel file on your computer using the Browse button.

Choose File No file chosen  
Or drop file here

**Step 4.** Click **Upload** to import the contents of the Excel file to your event.  
Note: Values in the Excel file will overwrite and delete any values you may have entered in your saved response.

Upload

Done

Lars Black (test.avertinc@gmail.com) last visited 9 Jun 2020 2:01:57 AM Avert Inc AN01484114660-T  
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RFI (1).xls Show all X



# 3.1 Collaborate using Excel

## ANSWERING QUESTIONS USING EXCEL

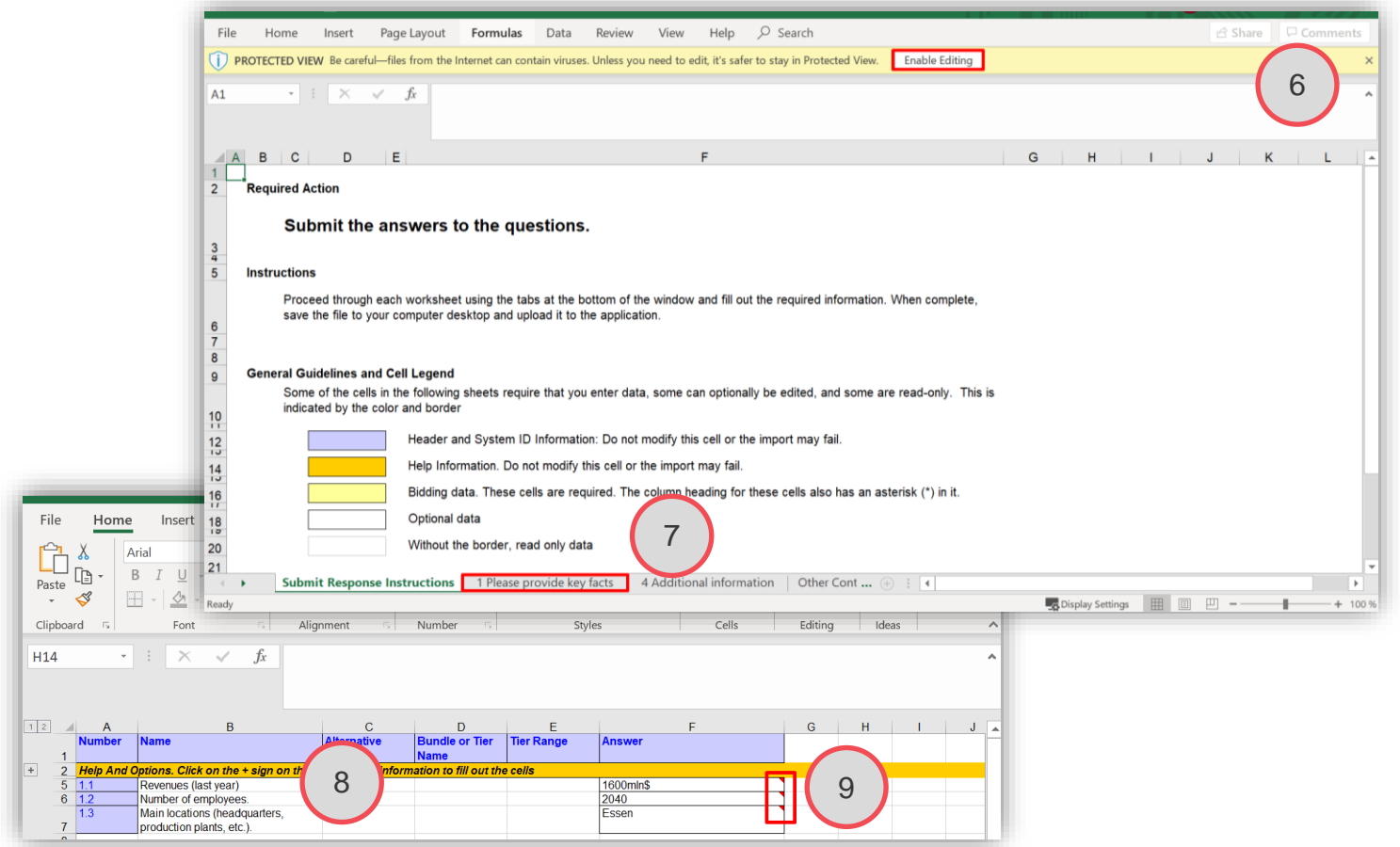
### Response from Excel

Intend to Participate

Response from Excel

Here you can collect answers for the questions.

- 6. Click **enable to edit**.
- 7. The survey sections provided on the pages of the excel. Open the 1<sup>st</sup> page.
- 8. Answer to the questions.
- 9. In comments for the cells you can find info about data type asked for the cell.



# 3.1 Collaborate using Excel

## ANSWERING QUESTIONS USING EXCEL

### Response from Excel

Intend to Participate

Response from Excel

Go back to the page of Import Response from Excel. You can upload the file you changed by

10. Click **Choose File** or **drop file** to the appropriate field.

11. Click **Upload**.

12. Click **Ok**

Ariba Sourcing

< Go back to Tesa - TEST Dashboard

### Import Response from Excel

Done

This page allows you to export and import event content and submit bids. It is not intended to add attachments. To add attachments, return to the previous page and click the link to browse for an attachment.

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Download Content

**Step 2.** Declare your intention to respond and enter your response in the Excel spreadsheet and save the file to your computer.

**Step 3.** Locate the saved Excel file on your computer using the **Choose File** button.

Choose File | No file chosen

Or drop file here

**Step 4.** Click **Upload** to import the contents of the Excel file to your event. Note: Values in the File will overwrite and delete any values you may have entered in your saved response.

Upload

Done

12

Import Successful

Your response has been imported successfully. Click the **Submit Entire Response** button, as soon as it appears on the page.

OK

# 3.1 Collaborate using Excel

## ANSWERING QUESTIONS USING EXCEL

### Response from Excel

Intend to Participate

Response from Excel

The answers from excel get into answer fields of the survey.

14. Fill in line item price cause this info doesn't autofill from excel.

15. Click **Submit entire response**.

16. Click **OK**.

Ariba Sourcing interface showing a survey response form. The form includes fields for "1.1 Revenues (last year)" (1600mln\$), "1.2 Number of employees." (2040), and "1.3 Main locations (headquarters, production plants, etc.)." (Essen). A "Submit Entire Response" button is highlighted with a red box and circled with "14". A "13" is circled in the top right corner.

Confirmation dialog box titled "Submit this response" with "Click OK to submit." and "OK" and "Cancel" buttons. The "OK" button is highlighted with a red box and circled with "15".

# 3.1 Collaborate using Excel

## ANSWERING QUESTIONS USING EXCEL

### Response from Excel



Intend to Participate

Response from Excel

Response was successfully submitted.

Ariba Sourcing

< Go back to Tesa - TEST Dashboard

Company Settings | Lars Black

Desktop File Sync

Doc431668218 - RFI

Time remaining 9 days 22:40:28

Console

- Event Messages
- Response History
- Response Team

Checklist

- Review Event Details
- Select Lots
- Submit Response

Event Contents

- All Content

1 Please provide key f...

4 Additional information

✓ Your response has been submitted. Thank you for participating in the event.

Revise Response

All Content

Name ↑	Price	Quantity	Extended Price
1 Please provide key facts			
1.1 Revenues (last year)	1600mln\$		
1.2 Number of employees.	2040		
1.3 Main locations (headquarters, production plants, etc.).	Essen		
2 Please upload the latest company presentation.			
3 Please list previous projects with tesa (if applicable).			
4 Additional information			

## 3.2 Collaborate using Ariba's team functionality

3.2.1 [Participate as a response team](#)

3.2.2 [Add users to your account to participate as a response team](#)

## 3.2 Collaborate using Ariba's team functionality

### 3.2.1 Participate as a response team

#### ANSWERING RFx EVENTS USING EXCEL OR SEVERAL SUPPLIER USERS

##### Options summary

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- Project Buyer from tesa side can create several contact persons & invite them all to the event as one response team
- You [can create new users in your account and share access to tesa events to these users](#).

**NOTE:** Multiple people cannot log in with the same username at one time. That causes an error that rejects all users from the system.

## 3.2.1 Participate as a response team



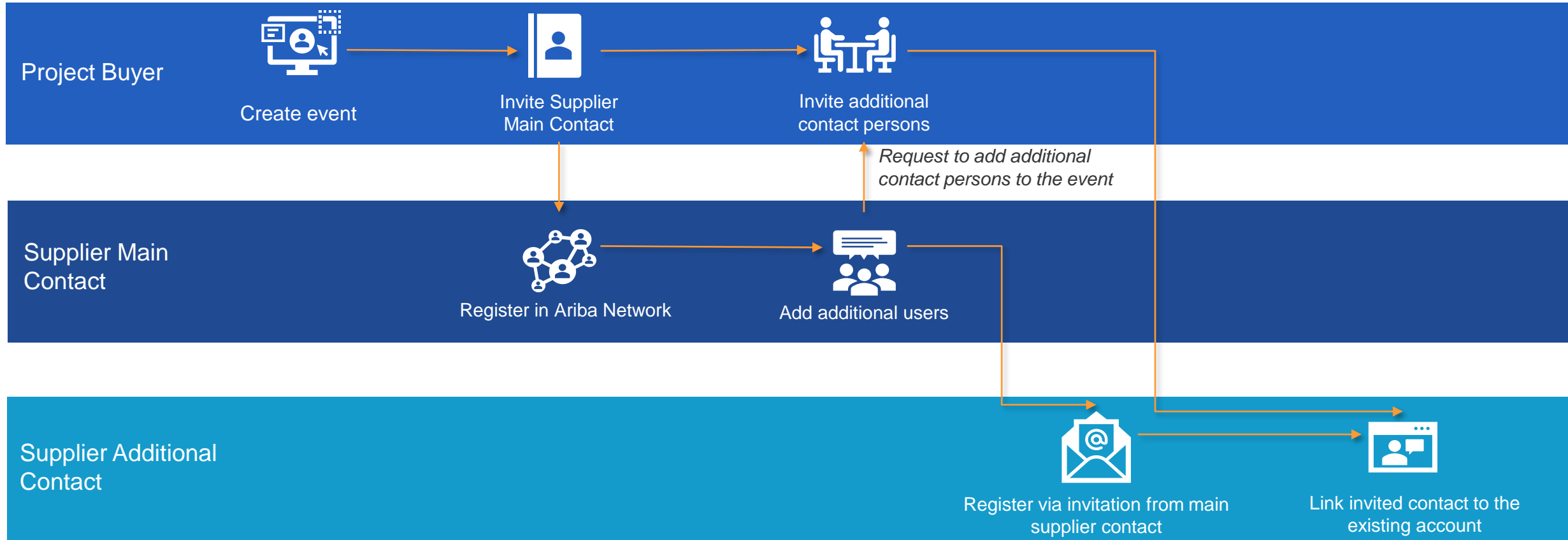


## 3.2 Collaborate using Ariba's team functionality

### 3.2.1 Participate as a response team

#### HOW TO ADD ADDITIONAL SUPPLIER USERS TO THE EVENT

##### Process flow



#### NOTE:

The invitation of additional contact persons via tesa project buyer is required only one time. After contact person and AN account are linked supplier contacts can invite each other to the events without involving of tesa project buyer.

## 3.2 Collaborate using Ariba's team functionality

### 3.2.1 Participate as a response team

#### USE SEVERAL CONTACT PERSONS AS RESPONSE TEAM

How to view and add response team members

View response team

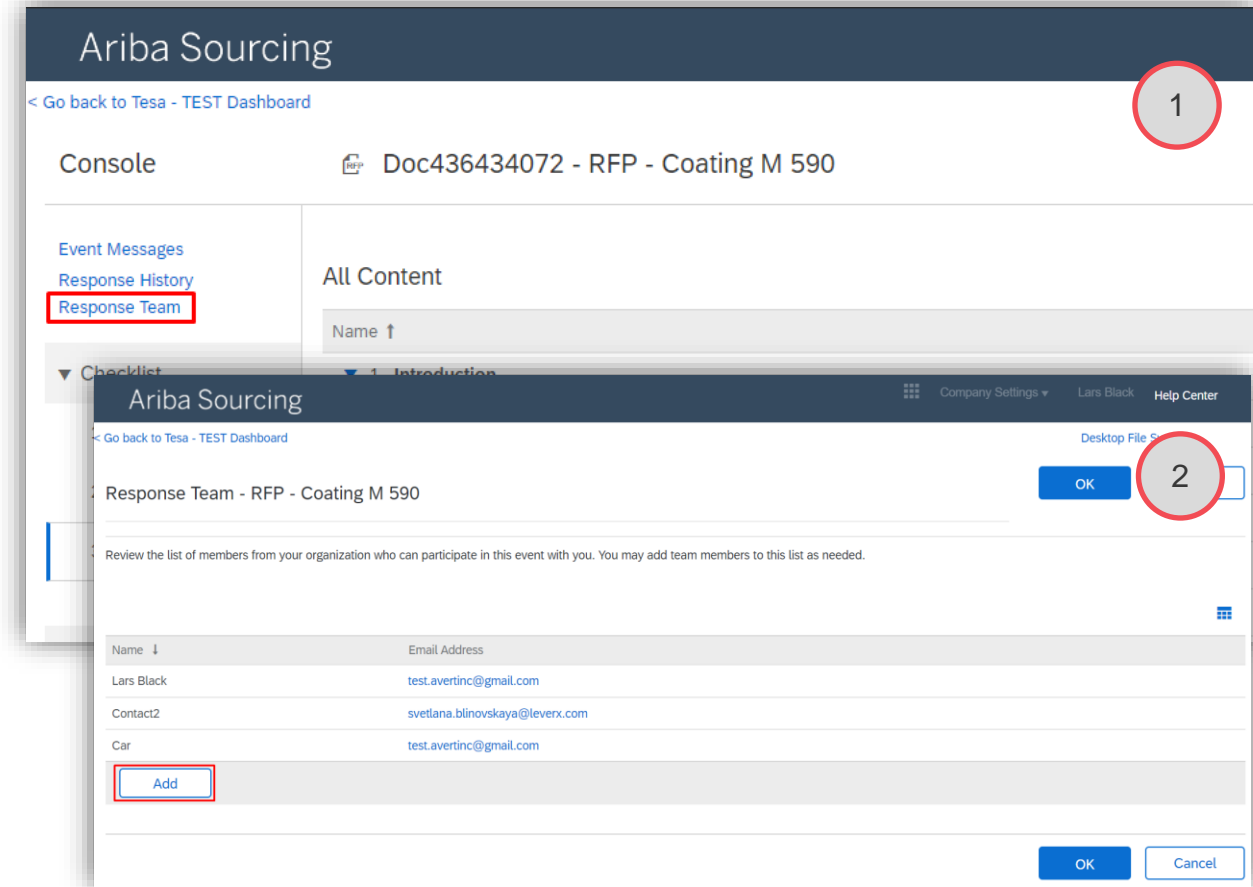
Add response team members

You can add additional users to the response team.

1. To view the people from your organization that have been grouped as a response team, click **Response Team** on the **Review Event Details** page.
2. The **Response Team** page displays the people from your organization who can participate in the event with you. To add additional members from your organization to the response team, click **Add**.

#### NOTE:

- You can add only users which exists on tesa site. If you see an empty list when adding users (next slide) - you need to check if users are created in your supplier account and if the same users were created in tesa site and linked to you're an users.



## 3.2 Collaborate using Ariba's team functionality

### 3.2.1 Participate as a response team

#### USE SEVERAL CONTACT PERSONS AS RESPONSE TEAM

How to view and add response team members

View response team

Add response team members

3. Select the team members you want to add and click **OK**.

4. On the **Response Team** page, click **OK**.

**NOTE:** Supplier can add users to the Response Team by himself, but only users who exist in tesa site.

#### Limitations for working in response teams:

- SAP Ariba Sourcing does not allow more than one response team member to submit a response at the same time. However, response team members can access events, view messages, and view the **Response History** page at the same time.

The screenshot displays the SAP Ariba Sourcing interface. At the top, the header reads 'Ariba Sourcing'. Below it, a navigation link says 'Go back to Tesa - TEST Dashboard'. The main content area is titled 'Response Team - RFP - Coating M 590'. Below the title, there is a table listing team members. The table has two columns: 'Name' and 'Email Address'. The table contains the following entries:

Name	Email Address
Livetti	livettimachine@protonmail.com
Lars Black	test.avertinc@gmail.com
Lars Black	test.avertinc@gmail.com
Contact2	svetlana.blinovskaya@leverx.com
Car	test.avertinc@gmail.com

Below the table, there is an 'Add' button. To the right of the table, there is a modal dialog titled 'Add Team Members'. The dialog has a table with the same columns as the main table. The table in the dialog contains the following entries:

Name	Email Address
Hanna Patis	realmariba@gmail.com
Lars Black	test.avertinc@gmail.com
Livetti	livettimachine@protonmail.com

The checkboxes for 'Lars Black' and 'Livetti' are checked. Below the table in the dialog are 'OK' and 'Cancel' buttons. A red circle with the number '3' is placed in the top right corner of the dialog. A red circle with the number '4' is placed in the bottom right corner of the main page, near the 'Add' button.

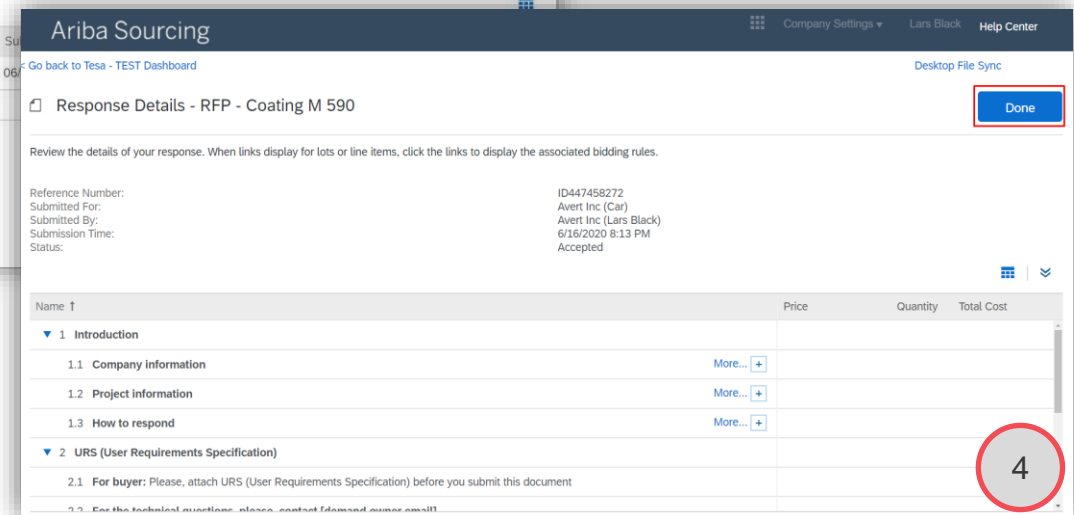
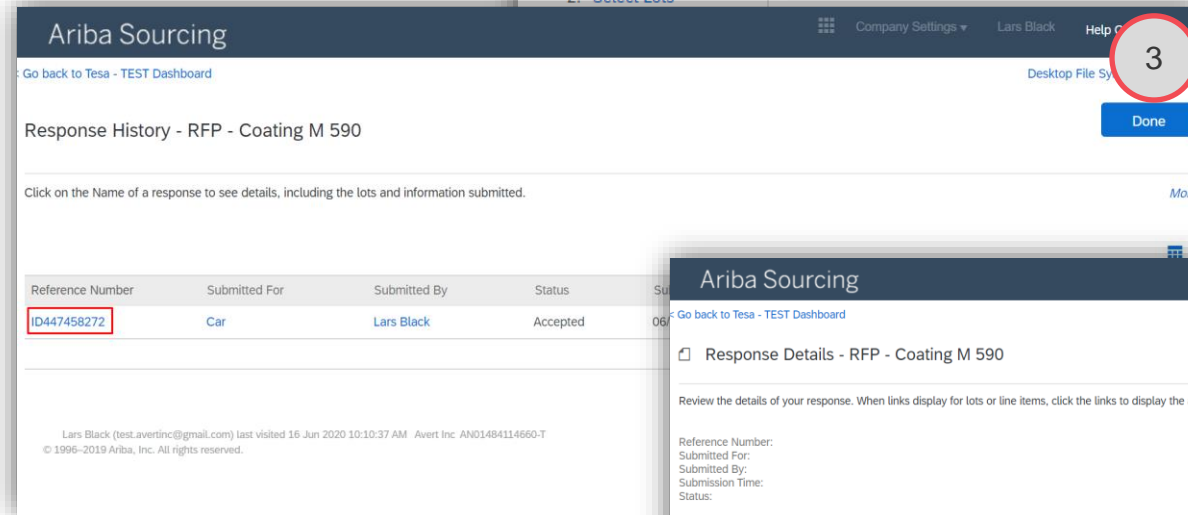
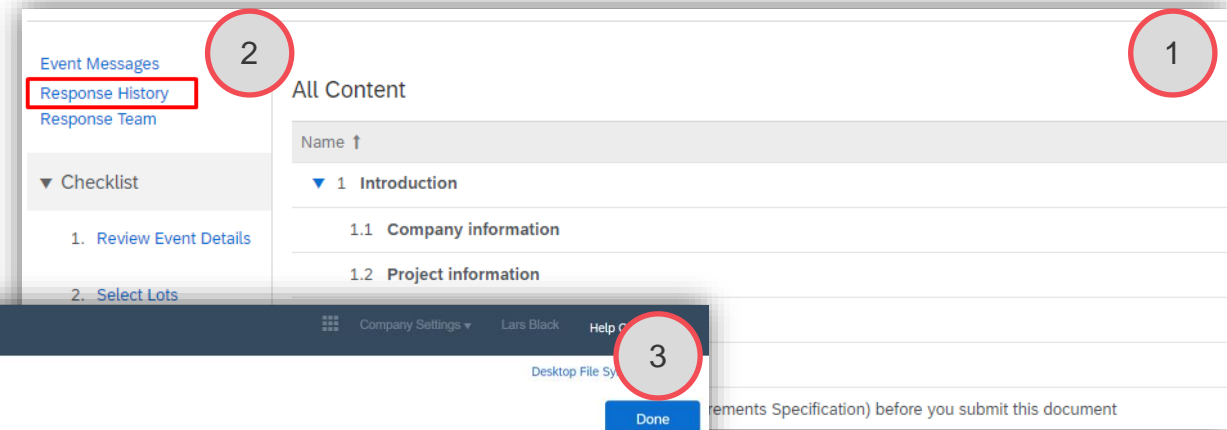
## 3.2 Collaborate using Ariba's team functionality

### 3.2.1 Participate as a response team

#### USE SEVERAL CONTACT PERSONS AS RESPONSE TEAM

How to view the bidding history for your response team

1. Go to the **Review Event Details** page for an event
2. On the **Review Event Details** page, click **Response History**.
3. Click the bid **Reference Number** link to view the bid details.
4. When you have finished viewing the response history, click **Done**.



## **3.2.2 Add users to your account to participate as a response team**



## 3.2 Collaborate using Ariba's team functionality

### 3.2.2 Add users to your account to participate as a response team

#### ADD USERS TO THE SUPPLIER ACCOUNT



Create Role

Create User

Only your company's account administrator can add users to your account (*In most of the cases it's the first invited and registered person*).

To add users to the account, you must first create at least one role. You can assign multiple users to the same role or create a separate role for each user.

#### To create a role:

1. In the upper-right corner of the application, click  and select Users.
2. Under the Manage Roles tab, click .

The screenshot displays the Ariba application interface. In the top right corner, a gear icon (1) is highlighted, which opens a settings menu. The 'Users' option in this menu is highlighted with a red underline. Below the settings menu, the 'Account Settings' page is visible, showing the 'Manage Roles' tab. A plus icon (2) is highlighted in the top right corner of the 'Manage Roles' section, indicating where to click to create a new role. The 'Manage Roles' section shows a table of roles and users assigned to them.

Role Name	Users Assigned	Actions
Administrator	Lars Black	
Hanna Patis	Hanna Patis	

## 3.2 Collaborate using Ariba's team functionality

### 3.2.2 Add users to your account to participate as a response team

#### ADD USERS TO THE SUPPLIER ACCOUNT

Create Role

Create User

3. Enter a **Name** for the role.

4. Select the appropriate **permissions** using the check boxes.

You need to assign at least one role.

For the access to the sourcing events your users need the role **Access Proposals and Contracts**.

5. Click **Save**.

SAP Ariba Network Enterprise Account TEST MODE

Create Role

\* Indicates a required field

New Role Information

Name: \*

Description:

Permissions

Each role must have at least one permission.

Page 2

Permission	Description
<input type="checkbox"/> Quality Notification Creation	Access to create quality notification documents
<input type="checkbox"/> Review Access	Access to view quality review documents
<input type="checkbox"/> Review Creation	Access to create quality review documents
<input type="checkbox"/> Invoices Upload	Select receivables for auction
<input checked="" type="checkbox"/> Access Proposals and Contracts	View your organization's Ariba Sourcing events and Ariba Contract Management contracts, documents, and tasks. This permission grants access to the Proposals and Contracts properties. Individual users must be approved by Ariba Sourcing buyers before they can view or participate in events or contract tasks
<input type="checkbox"/> Credit Card Number Access	Manage the display of credit card numbers on purchase orders
<input type="checkbox"/> Supplier Treasury Agent	View buyer-initiated early payment offers
<input type="checkbox"/> Time & Expense Sheet Management	Review and update Time and Expense sheets
<input type="checkbox"/> Supply Chain Financing Provider Portal Access	Access to the Supply Chain Financing provider portal to trade eligible documents.



## 3.2 Collaborate using Ariba's team functionality

### 3.2.2 Add users to your account to participate as a response team

#### ADD USERS TO THE SUPPLIER ACCOUNT

Create Role

Create User

1. Go to the **Manage Users** tab and click on Plus button
2. Enter the **user's information** (Username, Email Address, First Name, Last Name and Phone).
3. Select a **role** in the **Role Assignment** section.
4. Assign to Customer: **you can choose all customers or only tesa.**
5. Click **Save**.

SAP Ariba Network - Enterprise Account - TEST MODE

Account Settings

Customer Relationships Users Notifications Application Subscriptions Account Registration API management

Manage Roles Manage Users

Users (1)

Create User

Create a new user account and assign a role and if needed assign them to a business unit. Ariba will email a temporary password to the address provided for the new user account. The account information entered here will not be modifiable after. However, you can modify role assignments at any time.

New User Information

Username: \* realmariba@gmail.com ⓘ

Email Address: \* realmariba@gmail.com

First Name: \* Adrian

Last Name: \* Bulk

Do not allow the user to resend invoices to the buyer's account. ⓘ

This user is the Ariba Discovery Contact ⓘ

Limited access ⓘ

Office Phone: Country: USA 1 Area: Number:

Role Assignment

Name	Description
<input type="checkbox"/> Hanna Patis	
<input checked="" type="checkbox"/> Proposals and Contracts Access	Access Proposals and Contracts
<input type="checkbox"/> Discount Manager	

Customer Assignment

Assign to Customer:  All Customers  Select Customers

Done

## 3.2 Collaborate using Ariba's team functionality

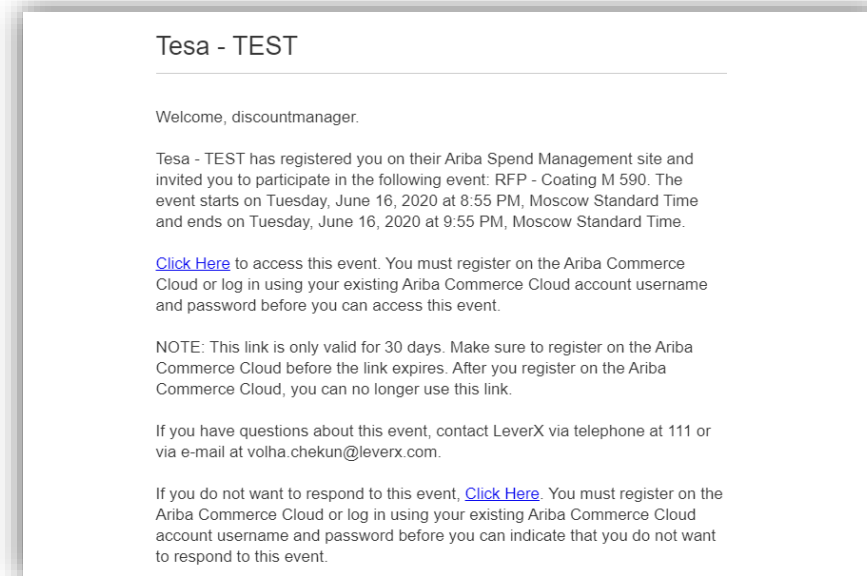
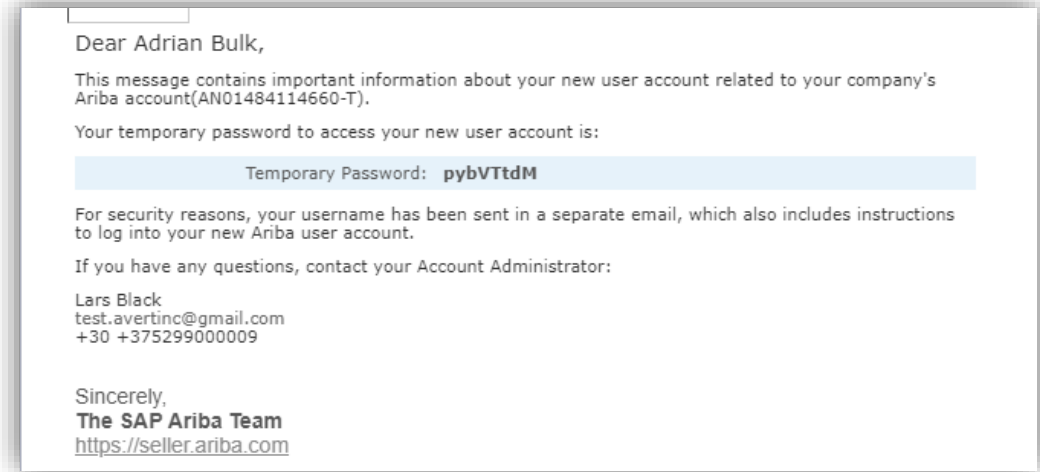


### 3.2.2 Add users to your account to participate as a response team

#### ADD USERS TO THE SUPPLIER ACCOUNT

After you create the user, the user receives an email with the **username and a temporary password**. The user must access the account and **change the password** when logging in for the first time.

When tesa Project Buyer create a new contact person and invite them to the event as one response team, the user will be added to the system and will receive an **email invitation when the event is launched, explaining how to register**.



## 3.2 Collaborate using Ariba's team functionality

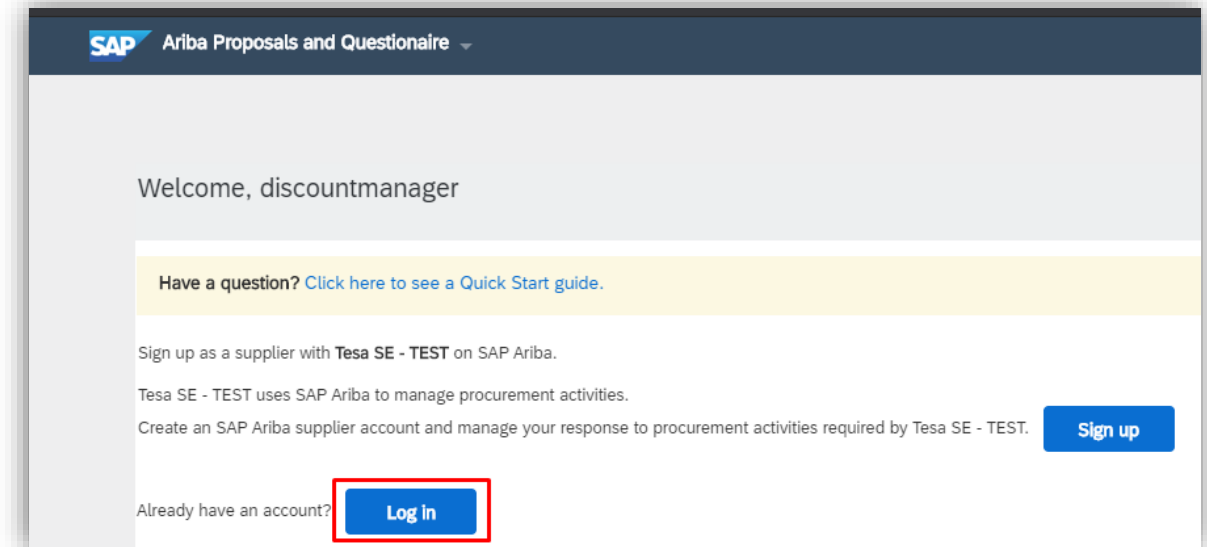
### 3.2.2 Add users to your account to participate as a response team

#### LINK EXISTING ACCOUNT WITH TESA CONTACT PERSON

As an additional contact person already have an account, he can **Log In** to the System without doing additional registration.

At this point of time, new user in tesa **site will be linked to the existing user** in Ariba Network.

Once done, user will be able to see the sourcing event.







Thank you for your attention!

