



Supplier Management for Existing Suppliers



Welcome to the **Supplier Management** training course. Here is a list of topics that will be covered in this course:

- Course Introduction
- Lesson 1: Basic Navigation
- Lesson 2: Supplier Change Requests
- Lesson 3: Responding to Solicitations
- Lesson 4: Create an Invoice
- Course Summary

Learning Objectives

After completing this course, you will be able to:



Understand the Navigation within PAVES



Create and submit Supplier Change Requests



Respond to Solicitations in PAVES



Create an Invoice in PAVES

Supplier Management for Existing Suppliers

COURSE INTRODUCTION

What's New

PAVES Supplier Portal will house all Supplier activities.

1

You will be able to view all solicitations, contracts, and purchase orders.

2

You will be able to create proposals and bids for solicitations, acknowledge purchase orders, manage the PAVES profile, add Supplier contacts, and create invoices

Lesson 1

BASIC NAVIGATION

Existing Supplier Login



As an existing Supplier, you will receive an email from trspaves@ivalua.com with a link to PAVES to login to the Supplier Portal and reset your password. Some Suppliers will also have to update their name information in the Profile section.

Navigation Overview

Basic Navigation will cover the following topics/functions.



Accessing PAVES



Login



Welcome to PAVES, the pathway to doing business with TRS! As a registered supplier, you have access to an integrated portal that can save you time and money as well as increase visibility into your TRS purchase orders and contracts. Features include:

- Real-time access to purchase orders and contracts
- Electronic invoice submission
- Invoice status tracking
- Online submission of bids and proposals
- Managing your contacts and users
- Deliverable notifications and reminders

IDENTIFICATION

Login *

Password *

Login

Lost your password?



Contact Info for Help Desk 1-800-XXX-XXXX



New Supplier Registration



Show public request for proposals

- Click on **Lost your password** to reset your password.
- Enter your email address and new password in the **Login** field.
- If necessary, update the first and last name for the Supplier profile.

Navigation Overview



Homepage Interface

The screenshot displays the TRSPAVES Supplier Portal homepage. At the top, a dark blue navigation bar contains the TRSPAVES logo on the left and a menu with options: General Info., Solicitation, Contracts, Orders, and Invoicing. On the right side of this bar are a notification bell icon, a user profile dropdown for 'Alex P.', and a user icon. Below the navigation bar is a light gray header area with a search bar on the right and a navigation area on the left containing back, refresh, and star icons. The main content area is divided into two columns. The left column features a sidebar with 'Company Profile', 'RFP in Progress' (0), and 'Invoices' (0). The right column is titled 'Onboarding Progress' and lists four stages: 'Confirmed Bidder' (Onboard Pending), 'Preparation' (Gather Information), 'Approval in Progress' (Review Information), and 'Activated' (Onboard Complete). A central message with a clipboard icon states: 'There is no item requiring your attention at the moment.' To the right of this is a 'Validations' section which is currently empty.

The homepage contains the following sections:

1. Menu Options
2. Dashboard
3. User Options
4. Navigation Icons

Menu Options

The screenshot displays the TRSPAVES web application interface. At the top, a dark blue navigation bar contains the TRSPAVES logo on the left and user information (ABC T.) on the right. Below the navigation bar, a horizontal menu bar is visible, with the 'General Info.' tab selected and highlighted in red. A red box also highlights the drop-down menu for 'General Info.', which includes 'Company Profile' and 'Sub-Tier Network'. The main content area is divided into three sections: 'Onboarding Progress', 'Validations', and a central message. The 'Onboarding Progress' section shows a list of steps: 'Confirmed Bidder' (Onboard Pending), 'Preparation' (Gather Information), 'Approval in Progress' (Review Information), and 'Activated' (Onboard Complete). The 'Validations' section is currently empty. The central message, accompanied by a green checkmark icon, states: 'There is no item requiring your attention at the moment.'

The menu bar displays the different tabs within PAVES. Clicking on the options will display a drop-down menu associated with the selected tab.

Homepage Dashboard

TRSPAVES Procurement and Vendor e-System

General Info. Solicitation Contracts Orders Invoicing

John S. (TRS Test Supplier A)

Supplier Portal

Search

Onboarding Progress

- Confirmed Bidder**
Onboard Pending
- Preparation**
Gather Information
- Approval in Progress**
Review Information
- Activated**
Onboard Complete

The following items require your attention:
 [Change request in progress](#)

Validations

1 Results

Process	Object	Action	Due date
Contract (For TRS)	DK Test Contract 4/8/2021 - TRS Test Supplier A	Vendor final approval and Signature	

Announcement

Dashboard displays tasks which are awaiting your review and approval. Clicking the hyperlinks will reroute you to the associated screen to complete your task.

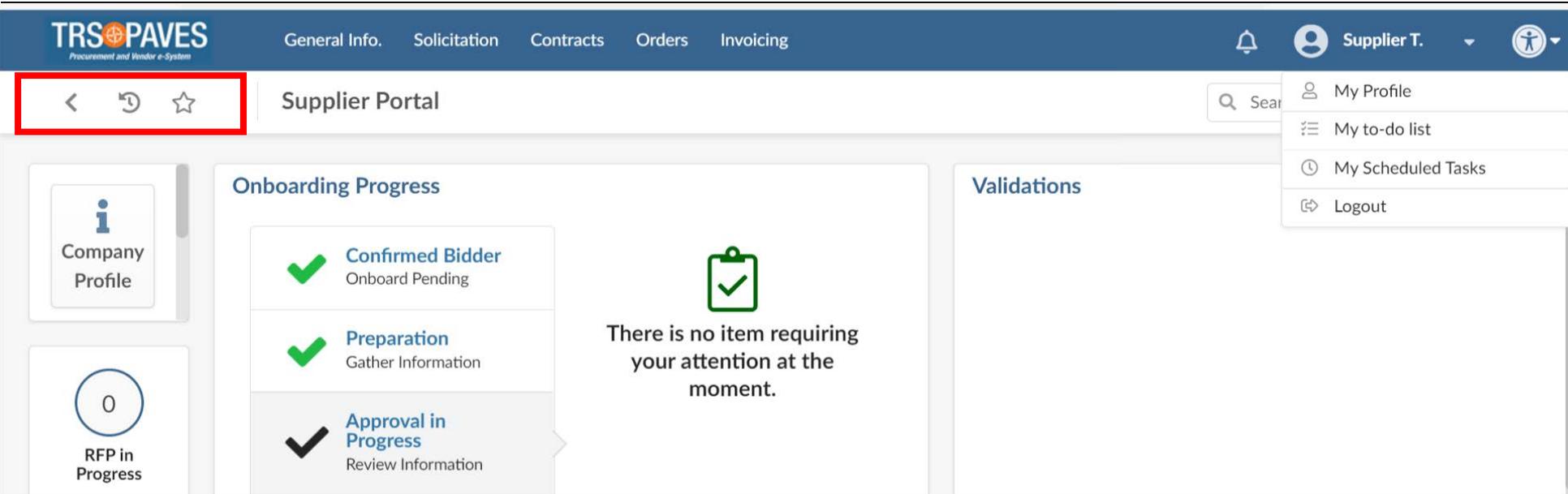
User Options

The screenshot displays the TRSPAVES Supplier Portal interface. At the top, there is a navigation bar with the TRSPAVES logo on the left and navigation links for General Info., Solicitation, Contracts, Orders, and Invoicing. On the right side of the navigation bar, there is a notification bell icon and a user profile dropdown menu. The user profile dropdown menu is highlighted with a red box and contains the following options: My Profile, My to-do list, My Scheduled Tasks, and Logout. Below the navigation bar, the main content area is titled "Supplier Portal" and features a search bar. The main content area is divided into three sections: "Onboarding Progress", "Validations", and "RFP in Progress". The "Onboarding Progress" section shows three items: "Confirmed Bidder" (Onboard Pending), "Preparation" (Gather Information), and "Approval in Progress" (Review Information). The "Validations" section is currently empty. The "RFP in Progress" section shows a count of 0.

Click on your **User Name** to display the following options:

- **My Profile:** Displays your account profile and enables you to update your personal information default settings and preferences.
- **My to-do list:** Contains anything assigned to you for action, such as acknowledging orders. In addition, you will receive an email whenever you have been invited to participate in a solicitation.
- **My Scheduled Tasks:** Displays open scheduled tasks assigned to you.

Navigation Icons



To the left of the page name are several navigational icons which can help you quickly access recently or frequently visited pages.

	Back Arrow: Returns you to the previous page.
	History: Allows you to return to previously viewed pages.
	Favorites: Enables you to create “shortcut” links to frequently visited items. These links are accessible from any page in PAVES.

Homepage Interface

The screenshot displays the TRSPAVES Supplier Portal homepage. At the top left, the TRSPAVES logo is highlighted with a red box. The navigation bar includes links for General Info., Solicitation, Contracts, Orders, and Invoicing. On the right, there is a user profile for 'Supplier T.' with a dropdown menu containing 'My Profile', 'My to-do list', 'My Scheduled Tasks', and 'Logout'. Below the navigation bar, the main content area is divided into three sections: 'Onboarding Progress', 'Validations', and a central message. The 'Onboarding Progress' section lists three items: 'Confirmed Bidder' (Onboard Pending), 'Preparation' (Gather Information), and 'Approval in Progress' (Review Information). The central message states: 'There is no item requiring your attention at the moment.' The 'Validations' section is currently empty.

The PAVES logo works like most Webpages. No matter which screen you are on, you will see the logo in the upper left-hand corner. Click on this logo to return to the homepage.

Navigation Overview



Page Elements

The screenshot displays the TRSPAVES web application interface for a contract record. The top navigation bar includes tabs for General Info, Solicitation, Contracts, Orders, and Invoicing. The left-hand sidebar contains functional tabs: General info, Hierarchy, Documents, Team, Sub-Contractors, and Deliverables. The top action bar contains buttons for Save, Save & Close, Return, and Approve. The main content area is divided into two panels: Contract Header and Contract Term. The Contract Header panel contains fields for Contract (DK Test Contract 4/8/2021), Code (CTR000021), Type (Master Agreement), Validity (Active), Reference, Status (Vendor Signature), Contracting Entity (TRS), and Supplier (TRS Test Supplier A). The Contract Term panel contains fields for Effective Date (4/8/2021), Signature Date, and Original End Date (4/7/2022).

- **Functional tabs** are on the left-hand side of the screen and vary depending on the record. You can access all of the tabs or sections of the record by clicking on these options. To see the full name of the tab, click the arrow (>>) above the tab list to expand the view.
- **Action buttons** appear at the top of the screen and also vary by record. Examples of action buttons include, **Save, Approve, Reject, Other Actions**,¹⁸ etc.

Page Elements

Contract : DK Test Contract 4/8/2021

Save Save & Close Return Approve

Contract Header

Contract	Code
DK Test Contract 4/8/2021	CTR000021
Type	Validity
Master Agreement	Active
Reference	Status
	Vendor Signature
Contracting Entity	Supplier
TRS	TRS Test Supplier A

Contract Term

Effective Date	Signature Date
4/8/2021	
Original End Date	
4/7/2022	

- The **Page Name** is displayed on the top left corner of each screen. This will be visible no matter where you are in the system.

Page Elements

The screenshot displays the TRSPAVES Invoicing interface. At the top, there is a navigation bar with the TRSPAVES logo and menu items: General Info., Solicitation, Contracts, Orders, and Invoicing. The Invoicing menu is active. To the right of the navigation bar, there is a user profile for John S., a notification bell, and a dropdown menu for (TRS Test Supplier A). Below the navigation bar, there is a search bar and a printer icon. The main content area contains three columns of form fields:

- Invoice header:** Supplier Invoice Number* (highlighted with a red box), Currency (USD), Invoice Date* (5/25/2021), Supplier (TRS Test Supplier A), Department, Contact, Supplier Remit-To Address*, and Requisitioner.
- Payment Information:** Payment Terms (30 days invoice date) and Due Date.
- Orders/Contracts:** Order and Contract dropdown menus.

At the top of the form area, there are four buttons: Save, Save & Close, Validate, and Cancel Invoice.

- **Required fields** are indicated with an asterisk (*) next to the field name. These fields must be filled in prior to saving a record. A warning message will appear for any required field that is not filled in.

Viewing Records

	Code	Supplier Invoice #	Supplier	Currency	Ordered	Received	Invoiced	Invoice Date	Due Date	Payment Date	Status
	INV000106	Test NO PO	TRS Test Supplier	USD	0.00	0.00	0.00	5/24/2021	6/30/2021		Draft
	INV000105	Test NO PO	TRS Test Supplier	USD	0.00	0.00	0.00	5/24/2021	6/30/2021		Draft
	INV000104	Test NO PO	TRS Test Supplier	USD	0.00	0.00	0.00	5/24/2021	6/30/2021		Draft
	INV000103	TESTAJL 05/21/21	TRS Test Supplier	USD	0.00	0.00	250.00	5/21/2021	6/19/2021		Draft
	INV000102	INV B234	TRS Test Supplier	USD	0.00	0.00	1,240.00	5/21/2021	6/19/2021		Draft

Certain fields can be clicked to view the detailed record.

Note the following:

- Depending on the field, the record displayed will vary.
- You can click on the pencil icon to edit / view the record, if you have been assigned a role that allows you to do so by the Supplier Admin.

Navigation Overview



PAVES provides two options to search for information:

1. **Universal Search** – This option searches across the entire solution and can be accessed on the top right corner of any page.
 - Results are organized by type (*Supplier, contracts, page, etc.*)
2. **Browse Search** – This option searches within a specific page, such as the Browse Items page, and the results are displayed in a table at the bottom of the page.
 - Keywords and filters can be applied to narrow search results.
 - Columns in the search results table can be reordered to display specific fields in the search results.

Search Function

The screenshot displays the TRSPAVES Supplier Portal interface. At the top, there is a navigation bar with the TRSPAVES logo on the left and user information (John S., (TRS Test Supplier A)) on the right. Below the navigation bar, the main content area is divided into several sections. On the left, there is a sidebar with 'Company Profile' and 'RFP in Progress' (0). The main content area is titled 'Supplier Portal' and contains three main sections: 'Onboarding Progress', 'Validations', and a search function. The 'Onboarding Progress' section shows three steps: 'Confirmed Bidder' (Onboard Pending), 'Preparation' (Gather Information), and 'Approval in Progress' (Review Information). The 'Validations' section shows a warning message: 'The following items require your attention: Change request in progress'. The search function is located in the upper right-hand corner of the main content area, with a search bar containing the text 'contract'. A red box highlights the search bar and the resulting search results, which include 'Pages' (Contracts > Manage Contracts) and 'Contracts' (DK Test Contract 4/8/2021 - TRS Test Supplier A).

Universal Search option is available in the upper right-hand corner of each screen, and can be used to search for all records in the system.

Once you enter a search term, a drop-down will appear with the relevant records in the system that match the search term.

Search Function

Keywords

Type

Status

Search

Reset

Filters

	Code	Contract	Type	End Date	Currency	Status
	CTR000021	DK Test Contract 4/8/2021	Master Agreement	4/7/2022	USD	Vendor Signature

1 Result(s)



Browse Search option searches within a specific page and the results are displayed in a table at the bottom of the page.

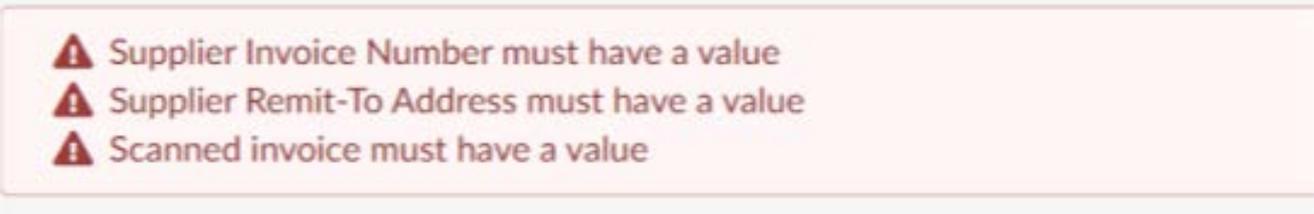
- Keywords and filters can be applied to narrow search results.
- Columns in the search results table can be reordered to display specific fields in the search results.

Navigation Overview



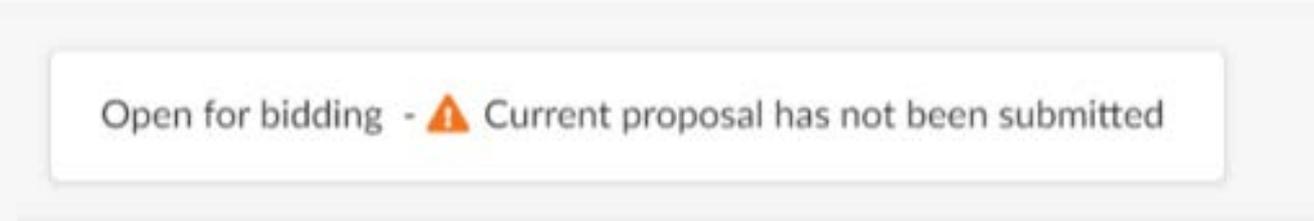
Alerts/Messages Alerts will notify you of missing information, expiring documents, or new data required for a particular task. There are two types of alerts:

- **Blocking Alerts:** Prevent you from completing a particular action until steps are taken to resolve the alert.



⚠ Supplier Invoice Number must have a value
⚠ Supplier Remit-To Address must have a value
⚠ Scanned invoice must have a value

- **Non-Blocking Alerts:** Serve as a warning and is usually a request for additional information or documentation.



Open for bidding - ⚠ Current proposal has not been submitted



We will now demonstrate the Basic Navigation

Lesson 2

SUPPLIER CHANGE REQUESTS

Supplier Change Requests

The Supplier Change Request process is initiated when there has been a change to the Supplier Record. These changes can be broken into one of the following:

- Adding a Remit-To address
- Changes to Company Information

In both cases, TRS will be notified of the change(s) made and will review/approve them.

Access Profile

The screenshot shows the TRSPAVES user interface. The top navigation bar includes the TRSPAVES logo, a menu with 'General Info.', 'Solicitation', 'Contracts', 'Orders', and 'Invoicing', a user profile for 'Admin S.', and a dropdown for '(TRS Test Supplier)'. A search bar is also present. The 'General Info.' menu is expanded, showing 'Company Profile' and 'Sub-Tier Network'. The main content area is divided into three sections: 'Company Profile' (with an 'i' icon), 'Onboarding Progress' (with a list of steps: Confirmed Bidder, Preparation, Approval in Progress, and Activated), and 'Validations' (with a table of items).

General Info.

- Company Profile
- Sub-Tier Network

Onboarding Progress

- Confirmed Bidder**
Onboard Pending
- Preparation**
Gather Information
- Approval in Progress**
Review Information
- Activated**
Onboard Complete

Validations

Process	Object	Action
Invoice (For TRS) - OLD	1590.00 USD - TRS Test Supplier - INV 12345 - 05/20/2021	Invoice Cre
Contract (For TRS)	TEST_AK_5.27.21 - TRS Test Supplier	Vendor App close-out
Contract (For TRS)	test sa agr - TRS Test Supplier	Vendor App close-out
Contract Attachments Workflow (For TRS)	DK Test contract 4-16 - test one dk	Vendor resp Information

- Select **General Info** and **Company Profile**.

New Remit-To Address

Company Info

Save

2 Result(s)

* Form W9 is mandatory before Submitting for Activation

Other Documents

Add Other Documents

Att.	Document Type	Document Name	Begin Date	Expiration Date	Owner	Status
EN_nda_template.doc	Non Disclosure Agreement	NDA client	4/15/2021	4/14/2022	TRS - Supplier Test	
EN_nda_template.doc	Non Disclosure Agreement	NDA doc	4/14/2021	4/20/2022	TRS - Supplier Test	
AP-152.pdf	Direct Deposit	Application for Texas Identification Number Form	4/20/2021		Admin Supplier	
Direct Deposit 74-176.pdf	Direct Deposit	Direct Deposit Authorization Form	4/20/2021		Admin Supplier	

4 Result(s)

- To update your Remit-To address, click the **Documents & Certs.** link.
- Click **Add Other Documents** to upload a new Direct Deposit document listing the new Remit-To address.
- TRS will be notified a new document has been uploaded for review and will update the address.

Company Information Change

The screenshot displays the 'Company Info' page in the TRSPAVES system. The top navigation bar includes 'General Info.', 'Solicitation', 'Contracts', 'Orders', and 'Invoicing'. The user is logged in as 'Admin S.' and is viewing the profile for '(TRSP Test Supplier)'. The main content area is titled 'Company Info' and contains two primary sections: 'Company' and 'HQ Address'. The 'Company' section, highlighted with a red border, includes fields for 'Company Name' (TRSP Test Supplier), 'Tax ID Number' (33-222225), 'Legal Name' (TRSP Test Supplier LLC), and 'Ownership Codes' (Financial Institution). Below this is an 'Other Information' section with fields for 'Year Founded' and 'Website'. The 'HQ Address' section features a map of Chicago and address fields: 'Address Label', 'Address Line 1' (200 E Randolph St), 'Address Line 2', 'Zip Code' (60601), 'City' (Chicago), 'Country' (UNITED STATES), and 'State/Province' (Illinois). At the top right of the form area, there are two buttons: 'Save' and 'Request Information Change', with the latter highlighted by a red box.

- To make changes to the **Company Information**, click **Request Information Change**.
- This makes the **Company Information** editable.

Company Information Change

TRSPAVES Procurement and Vendor e-System

General Info. Solicitation Contracts Orders Invoicing

Admin S. (TRSPAVES)

Company Change Request

Save Cancel **Submit for Approval**

Please choose a correct address by clicking on the "Address" field

Change Request

Reason for change request*

Company

Company Name* TRSPAVES Tax ID Number* 33-222225

Legal Name* TRSPAVES LLC Are you a certified HUB?*
 No
 Yes

Ownership Codes* Financial Institution

HQ Address

Map Satellite

Address Label

Address Line 1

- Make the appropriate changes, and note/explain them in the **Reason for change request** text box that is now visible.
- **Save** and **Submit for Approval**. This will also trigger a notification to TRS.

Lesson 3

RESPONDING TO SOLICITATIONS

Key Terms

Prior to beginning this section, let's take a few moments to review some of the key terms you will see referenced in this course:

1

Rounds: A method of communicating with TRS to garner/satisfy the items for the solicitation. Think of rounds as the different stages/steps of the solicitation after the solicitation has been sent to the Supplier.

2

SOW: A method of communicating with TRS that separates the different needs for a specific solicitation. A SOW is synonymous to a Lot.

3

P&C Responsible User: The TRS member that is responsible for the solicitation.

Supplier Response



You can be invited to respond to specific solicitations or respond to any public solicitation. This training course will teach you how to respond to both.

Viewing Public Solicitations

Fields marked by an asterisk * are mandatory



Welcome to PAVES, the pathway to doing business with TRS! As a registered supplier, you have access to an integrated portal that can save you time and money as well as increase visibility into your TRS purchase orders and contracts. Features include:

- Real-time access to purchase orders and contracts
- Electronic invoice submission
- Invoice status tracking
- Online submission of bids and proposals
- Managing your contacts and users
- Deliverable notifications and reminders

IDENTIFICATION

Login*

Password*

Login

Lost your password?



Contact Info for Help Desk 1-800-XXX-XXXX



New Supplier Registration



Show public request for proposals

- From the PAVES login page, click **Show public request for proposals**.

Viewing Public Solicitations

Show public request for proposals

Keywords Commodities

Round Name	Publication begin date	Publication end date	Begin	End	Link Sourcing project - Commodities	Remaining time
 Template Scored clarification / Interviews or Presentation / Site visits - Initial	5/19/2021 12:00:00 AM	5/24/2021 12:00:00 AM	5/19/2021 3:49:45 PM	5/24/2021 12:00:00 AM	*Application Software, Servers	04d 07h 41min 19s

1 Result(s)

- Click the pencil icon to view the Request for Proposal.

Participate in the Rfx

Return

Need login or register to participate to RFX

Participate in RFX

Round General Information

Code

BPM000338

Optional round

Initial Solicitation

Round Name

Template Scored clarification / Interviews or Presentation / Site visits - Initial

SOW#

1

Begin

5/19/2021 3:49:45 PM (UTC-4)

End

5/24/2021 12:00:00 AM (UTC-4)

Summary

BAA

No

Round Documents

Title	Type	Last Modification	Creation Date	Validity End Date
TRAINING examples	RFX Technical Documents (Approved)	Dummy Doc.docx	5/19/2021 3:56:00 PM	5/19/2021 3:43:59 PM
1 Result(s)				

Round Links

[View Questionnaire](#)

- Review the Request for Proposal information.
- If you wish to participate, click **Participate in Rfx**.

Supplier Login

Need login or register to participate to RFx

Register Save & Close Close

Fields marked by an asterisk * are mandatory

Login

Contact*

Password*

Login

Lost your password?

Security Control

Retype Characters Here P W L O

Company information

Goods/Products Offered

Round General Info

Code
BPM000338

Optional round
Initial Solicitation

Round Name
Template Scored clarification visits - Initial

SOW#
1

Begin
5/19/2021 3:49:45 PM

End
5/24/2021 12:00:00 AM

Summary

BAA
 No

- Enter the **Contact** and **Password**.
- Click **Login**.

Note: As you are an existing supplier, you do not need to complete the registration.

Select the Proposal

The screenshot shows the TRSPAVES web application interface. The top navigation bar includes tabs for 'General Info.', 'Solicitation', 'Contracts', 'Orders', and 'Invoicing'. The 'Solicitation' tab is selected, and a dropdown menu is open, showing 'Manage Proposals' and 'Show public request for proposals'. The 'Supplier Profile' is visible on the left. The main content area is divided into several sections: 'Onboarding Progress' with four steps (Confirmed Bidder, Preparation, Approval in Progress, Activated), 'Validations' with a table of 11 results, 'Performance Scoring' with 'Extranet - Scoring' and a message 'No data was found. Try changing the filter criteria.', and 'Spend Analysis' with a message 'Cube is not available. Process the following cubes buyer_default or contact an administrator.'

TRSPAVES Procurement and Vendor e-System

General Info. Solicitation Contracts Orders Invoicing

Admin S. (TRS Test Supplier)

Supplier Profile

Manage Proposals

Show public request for proposals

Search

Onboarding Progress

- Confirmed Bidder**
Onboard Pending
- Preparation**
Gather Information
- Approval in Progress**
Review Information
- Activated**
Onboard Complete

The following items require your attention:

- Change request in progress**

Validations

11 Results

Process	Object	Action	Due date
Invoice (For TRS) - OLD	1590.00 USD - TRS Test Supplier - INV 12345 - 05/20/2021	Invoice Creation	
Contract (For TRS)	TEST_AK_5.27.21 - TRS Test Supplier	Vendor Approve contract close-out	
Contract (For TRS)	test sa agr - TRS Test Supplier	Vendor Approve contract close-out	
Contract Attachments Workflow (For TRS)	DK Test contract 4-16 - test one dk	Vendor responses to Information Security	

Performance Scoring

Extranet - Scoring

No data was found. Try changing the filter criteria.

Spend Analysis

Spend Analysis

Cube is not available. Process the following cubes buyer_default or contact an administrator.

Company Profile

3 RFP in Progress

74 Invoices

10 Active Orders

- Select **Solicitation** and **Manage Proposals**.

Acknowledge Rfx

Manage Proposals

Search

Keywords Proposal Progress RFX Status
On Hold × Open for Bidding × Q Search Reset

Filters RFX Status: On Hold × Open for Bidding ×

Proposal Progress	Sourcing Project	SOW#	Round Name	RFX Status	Remaining Time	Begin	End	My Bid	Forum
●○○ Awaiting Acknowledgment	BPM000276	1	DK Test #2 - 0326	On Hold ⓘ	Bid due date has passed	5/13/2021 4:53:56 PM	5/13/2021 5:30:00 PM	0.00 USD	🗨️
✍️ ●○○ Awaiting Acknowledgment	BPM000327	2	Initial Post	Open for Bidding	13h 01min 00s	5/17/2021 10:56:29 AM	5/18/2021 12:00:00 AM	0.00 USD	🗨️
✍️ ○○● Submitted Proposal	BPM000204	1	Test GLP 7	Open for Bidding	Bid due date has passed	3/10/2021 9:25:28 AM	3/27/2021 1:00:00 AM	0.00	🗨️
✍️ ○●○ In Progress	BPM000233	1	Test	Open for Bidding	Bid due date has passed	3/9/2021 10:29:01 PM	3/16/2021 12:00:00 AM	0.00 USD	🗨️
●○○ Awaiting Acknowledgment	BPM000206	1	Test TVH	On Hold ⓘ	Bid due date has passed	3/4/2021 10:51:15 AM	3/5/2021 1:00:00 AM	0.00 USD	🗨️

5 Result(s)

Once you have chosen to participate in a RFX or been invited to a solicitation, you must first acknowledge the Rfx.

- Select a proposal that is marked as **Awaiting Acknowledgement**.

Acknowledge Rfx

The screenshot displays the TRSPAVES web application interface. The top navigation bar includes the TRSPAVES logo, a menu with 'General Info.', 'Solicitation', 'Contracts', 'Orders', and 'Invoicing', and user information for 'Admin S.' and '(TRS Test Supplier)'. The main content area is titled 'Initial Post (BPM000327) - SOW: 2 / Round : 1'. It features a 'Save' button and a 'Download all contents of this Rfx' button. A notification box indicates 'Remaining time : 13h 00min 45s - No proposal has been submitted'. Below this, an 'Acknowledgement' section contains the instruction 'To answer to this Rfx, please acknowledge receipt' and a button labeled 'I acknowledge receipt of this Rfx', which is highlighted with a red border.

- From the **Proposal Information** tab, click **I acknowledge receipt of this Rfx.**

Acknowledge Rfx

TRSPAVES Procurement and Vendor e-System

General Info. Solicitation Contracts Orders Invoicing

Admin S. (TRSPAVES Supplier)

Initial Post (BPM000327) - SOW: 2 / Round : 1

Save Download all contents of this Rfx

Remaining time : 13h 00min 19s - No proposal has been submitted

Receipt acknowledged on 5/17/2021 10:59:29 AM (UTC-4)

To answer to this Rfx, please confirm that you intend to bid.

WILL BID: our intent is to respond to this Rfx.

NO BID: we will not be able to respond to this Rfx.

Submit

General Information

Label

Description

Supplier Documents

- Select if you **WILL BID** or **NO BID**.
- Click **Submit**.

Add Proposal Information

TRSPAVES Procurement and Vendor e-System

General Info. Solicitation Contracts Orders Invoicing

Admin S. (TRS Test Supplier)

DK Test #2 - 0326 (BPM000276) - SOW: 2 / Round : 1

Save Validate & Submit Proposal Cancel Proposal Other Actions

Remaining time : 14h 34min 05s - ⚠ No proposal has been submitted

Acknowledgement

Submission acknowledged on 5/17/2021 at 5:32 PM

Supplier Documents

Click or Drag to add files

General Information

Label*

Description

- Enter a **Label** and a **Description** for the proposal.
- If necessary, add any **Supplier Documents** such as a NDA.
- Click **Save**.

Add Supplier Contact

TRSPAVES Procurement and Vendor e-System

General Info. Solicitation Contracts Orders Invoicing

Admin S. (TRS Test Supplier)

Initial Post (BPM000327) - SOW: 2 / Round : 1

Save Validate & Submit Proposal Cancel Proposal Other Actions

Proposal Information

My Team

Overview

Questionnaire

Discussions

History

Unable to answer some questions of this RFx?
Get help from your colleagues!

Invite your colleagues and give them access to this RFx.
You can choose from the contacts already identified on this portal, or easily create a new contact to invite a colleague.

Note:
All selected contacts can modify and submit your answer. They will only have access to this RFx.
New contact creation may require your buyer approval for account creation

Select Contact or Create a new contact

Name	Email
KNEISLER Dawn (supplier)	dawn.kneisler@ojc-consulting.com
SUPPLIER Admin	adminsupplier@test.com

2 Result(s)

- From the **My Team** tab, select a Supplier contact.
- If necessary, click **Create a new contact**.

Supplier Contact Information

The screenshot shows the 'Supplier Contact Management' form in the TRSPAVES system. The form is divided into several sections: 'Identity', 'List of languages', 'Phone', and 'Photo'. The 'Identity' section contains fields for Title, First Name, Last Name, Email, Position, and Internal Identifier. The 'List of languages' section has a dropdown menu set to 'English'. The 'Phone' section has fields for Phone, Cell Phone, and Fax. The 'Photo' section has an 'Add a picture' button. At the top of the form, there are three buttons: 'Save', 'Save & Close', and 'Close'. The 'Save & Close' button is highlighted with a red box. The background shows the TRSPAVES navigation menu and a breadcrumb trail: General Info > Solicitation > Contracts > Orders > Invoicing. The status bar at the bottom of the page displays various system metrics and a red warning message: '[Page] [432 missing texts] [Update texts] [Admin settings] [Page settings] [D] [dblog] [\$] 0.22s +1.24s 15.68MB [No configuration context audit] [Check accessibility] Development'.

- Enter the information for the new Supplier contact.
- Click **Save & Close**.

Round Overview

TRSPAVES Procurement and Vendor e-System

General Info. Solicitation Contracts Orders Invoicing

Admin S. (TRS Test Supplier)

DK Test #2 - 0326 (BPM000276) - SOW: 2 / Round : 1

Save Validate & Submit Proposal Cancel Proposal Other Actions

Round General Information

Code
BPM000276

Optional round
BAFO / BARFO

Round Name
DK Test #2 - 0326

SOW#
2

Begin
5/17/2021 5:31:32 PM (UTC-4)

End
5/19/2021 12:00:00 AM (UTC-4)

Summary

Acknowledgement
5/17/2021 5:32:10 PM (UTC-4)

BAA
 No

Round Documents

Title	Type	Contact	Last Modification	Creation Date	Valid
testing documents	RFx Technical Documents (Approved)	OBI Simon	5/13/2021 5:09:58 PM		

1 Result(s)

Round Links

[View Questionnaire](#)
[View Quotation Form](#)

- From the **Overview** tab, review the **Round General Information** and the **Round Documents**.
- Click the **Round Links** or use the corresponding tabs to navigate to the **Questionnaire** and **Item** sections.

Complete Questionnaire

The screenshot displays the TRSPAVES user interface. At the top, the navigation bar includes the TRSPAVES logo, user information (Admin S., (TRS Test Supplier)), and a search bar. The main content area is titled 'DK Test #2 - 0326 (BPM000276) - SOW: 2 / Round : 1'. Below the title, there are buttons for 'Save', 'Validate & Submit Proposal', 'Cancel Proposal', and 'Other Actions'. The left sidebar shows a navigation menu with 'Questionnaire' selected. The main content area is divided into two sections: 'Overview' and 'Answer Questionnaire'. The 'Overview' section shows progress for various questionnaire items, such as '1. General Information' (0/6) and '2. Minimum Qualification' (0/1). The 'Answer Questionnaire' section contains a green button labeled 'Access Questionnaire' (highlighted with a red box), and options to download the questionnaire in Excel 2007-2010 (xlsx) or Excel 97-2003 (xls) format. There is also a file upload area with a 'Click or Drag to add a file' button.

- From the **Questionnaire** tab, click **Access Questionnaire**.
- If necessary, select download in excel to complete the questionnaire offline. Upload back into the system when finished.

Additional Item Details

TRSPAVES Procurement and Vendor e-System

General Info. Solicitation Contracts Orders Invoicing

Admin S. (TRS Test Supplier)

DK Test #2 - 0326 (BPM000276) - SOW: 2 / Round : 1

Save Validate & Submit Proposal Cancel Proposal Other Actions

Drop here your quotation form (in Excel format)

Download in Excel 2007-2010 format (xlsx) Click or Drag to add a file

Download in Excel 97-2003 format (xls)

Currency: USD

Total
Total per currency
USD 3,000.00

Keywords

Unanswered Items Search Reset

Response

Code	Type	Label	Qty	UOM	Order	Deliv. date	Unit price	Amount	Deliv. date
1	Required Item	Seva Service	15.00000	ea.			200.00	3,000.00	5/26/2021

1 Result(s)

- From the **Item** tab, enter a **Unit Price** and a **Delivery date** for each item.
- If necessary, select download in excel to complete the quotation form offline and upload back into the system when finished.
- If necessary, click the plus icon to add an item.
- Click **Save**.

Communicating with TRS

The screenshot displays the TRS PAVES web application interface. At the top, there is a navigation bar with tabs for 'General Info.', 'Solicitation', 'Contracts', 'Orders', and 'Invoicing'. The user is logged in as 'Admin S.' and is viewing the 'Initial Post (BPM000327) - SOW: 2 / Round : 1'. The interface includes a search bar and a sidebar with navigation options like 'Proposal Information', 'My Team', 'Overview', 'Questionnaire', 'Discussions', and 'History'. The main content area shows a 'Keywords' search section with a 'Search' button and a 'Display' dropdown set to 'Unread or not replied'. Below this is a 'Compose' section with a 'Message History' button and a '0 Result(s)' indicator. To the right, there is a 'Message Type' dropdown set to 'Clarification', a 'From' field set to 'Supplier Admin', and a 'Subject' field set to 'Training'. The 'Send To' section shows 'Responsible (Solicitation Project)' as the recipient. A text input field contains the message 'i have a question about training requirements.' and there are 'Send' and 'Cancel' buttons at the bottom.

- The discussion tab is used for the Supplier to send any messages to TRS about the solicitations.

Note: You can only talk to the P&C Responsible team member. Talking to anyone else as it relates to the active solicitation could cause the solicitation to be canceled.

Initiating Discussions

TRSPAVES Procurement and Vendor e-System

General Info. Solicitation Contracts Orders Invoicing

Admin S. (TR S Test Supplier)

Initial Post (BPM000327) - SOW: 2 / Round : 1

Save Validate & Submit Proposal Cancel Proposal Other Actions

Remaining time : 12h 30min 26s - No proposal has been submitted

Keywords Search Reset Advanced Search

Display Unread or not replied

Compose Message History

0 Result(s)

Message Type* Clarification

From Supplier Admin

Subject* Training

Send To Responsible (Solicitation Project)

i have a question about training requirements.

Click or Drag to add files Send Cancel

- From the **Discussions** tab, click **Compose** to send a message to TRS if necessary.
- Select the **Message Type** and enter the **Subject**.
- Select the **Responsible** as the recipient and draft the message.
- If necessary, attach any files and click **Send**.
- Click **Save**.

View Proposal History and Status

Initial Post (BPM000327) - SOW: 2 / Round : 1

Remaining time : 12h 29min 56s - ⚠ No proposal has been submitted

Status

Cancelled × In progress × Submitted × + Q Search Reset

Keywords

Requests: Initial Post 1 × + Suppliers

Requests	Proposal	Status	Proposal Progress	Questionnaire Progress	Submitted	Total
Initial Post - 1	Training Proposal	In progress	0%	0%		

1 Result(s)

From the **History** tab, review the status of all proposals that have been submitted.

- Once the Item section is complete, the progress will reflect 100%.
- Once the Questionnaire section is complete, the progress will reflect 100%.

Submit Supplier Proposal

The screenshot shows the TRSPAVES web application interface. The top navigation bar includes 'General Info.', 'Solicitation', 'Contracts', 'Orders', and 'Invoicing'. The user is logged in as 'Admin S.' and is viewing the 'Initial Post (BPM000327) - SOW: 2 / Round: 1'. The main content area features a 'Validate & Submit Proposal' button, which is highlighted with a red box. Below this button, a modal dialog box is open, asking 'Do you really want to submit your proposal?'. The modal contains the following text: 'Once an offer is submitted, it cannot be modified. You will only be able to create a new one.' and a list of details: '41 / 41 questions have been filled.', '20 document(s) have been attached to the proposal. (Questionnaires)', and 'Total number of attached documents: 20'. The modal also has 'Cancel' and 'Submit my proposal' buttons, with the latter highlighted in red. The footer of the page contains technical information and version details: 'Trstx v1.0 © Development Enhancement'.

- Click **Validate & Submit Proposal**.
- Click **Submit my proposal**

Lesson 4

SELECT A SUBCONTRACTOR

Sub-Contractors

PAVES allows for the addition of subcontractors immediately within the process. This will allow TRS to meet HUB goals and be in compliance while not stalling anything in the process. Depending on the subcontractors added, the PAR form may also be needed during the invoice process.

Submit Supplier Proposal

TRSPAVES Procurement and Vendor e-System

General Info. Solicitation **Contracts** Orders Invoicing

Manage Contracts Manage Contracts

Search

Keywords: [] Type: [] Status: P&C Final Approval for close-out x Pending close-out x P&C signature x Vendor Approval for close-out x Vendor Signature x Negotiation in Progress x Signature in Progress x Signed x

Filters Status: P&C Final Approval for close-out x Pending close-out x P&C signature x Vendor Approval for close-out x Vendor Signature x Negotiation in Progress x Signature in Progress x Signed x

Code	Contract	Type	End Date	Currency	Status
CTR000142	test	Master Agreement	7/9/2021	USD	Signed
CTR000078	Contract Test dk 04-26	Master Agreement	7/28/2021	USD	Vendor Signature
CTR000070	test sa agr	Stand Alone Agreement	4/29/2021	USD	Vendor Approval for close-out
CTR000051	test amn1	Master Agreement	4/19/2022	USD	P&C signature
CTR000033	test12	Master Agreement	4/19/2021		Signed
CTR000006		Master Agreement			Signed
CTR000002	Default Contract - ReqRisk Assessment - DND	Stand Alone Agreement	12/18/2023	USD	Signed

7 Result(s)

- Select **Contracts** and **Manage Contracts**.
- Select the pencil icon of the contract you wish to select subcontractors for.

Submit Supplier Proposal

The screenshot displays the TRSPAVES web application interface. At the top, there is a navigation bar with the TRSPAVES logo on the left and user information (Admin S.) on the right. Below the navigation bar, the main content area is titled "Contract : Contract Test dk 04-26". The interface includes a search bar and several action buttons: "Save", "Save & Close", "Return", and "Approve". A search filter section contains fields for "Keywords", "Relationship Status", and "Commodity", along with "Search" and "Reset" buttons. The "Sub-Contractors" tab is selected in the left sidebar, and the "Add Sub-Contractor" button is highlighted with a red box. Below this button, it shows "0 Result(s)" with a gear icon for settings.

- Select the **Sub-Contract** tab and click **Add Sub-Contractor**.

Submit Supplier Proposal

Contract : Contract Test dk 04-26

Save Save & Close Return Approve

Manage Sub-Contractor

Save Close

Fields marked by an asterisk * are mandatory

Sub-Contractor Identity

Sub-Contractor Name* Legal Name*

HQ Address

Address Label

Address Line 1* Address Line 2

Zip Code City* State/Province Country*

Identifying Numbers

Tax ID Number* Website

Sub-Contractor Relationship

Contracts Contract Test dk 04-26

Country

Commodity

Relationship Status

Status

Draft

- Complete all the required fields and enter any additional information
- Click **Save**

Lesson 5

CREATE AN INVOICE

Select a Purchase Order

Keywords

Search

Reset

ID	Buyer Contact	Status	Currency	Ordered	Invoiced	Progress	Delay (d)	PO
 PO000060	Vaish Kashish	Executed	USD	10.00	10.00			\$ 
 PO000059	PnC - approver TRS - PnC	Executed	USD	10.00	10.00			\$ 
 PO000058	R H Meenakshi	Executed	USD	500.00	500.00			\$ 
 PO000052-1	Nair Vijith	Executed	USD	20.00	20.00			\$ 
 PO000047	PnC - approver TRS - PnC	Executed	USD	1,000.00	1,000.00			\$ 
 PO000041	Vaish Kashish	Executed	USD	100.00	100.00			\$ 
 PO000019	Agarwal Manjary	Executed	USD	20,000.00	10,000.00			\$ 
 PO000014	Agarwal Manjary	Executed	USD	50,000.00	50,000.00			\$ 
 PO000011	R Abhilash	Executed	USD	2,000.00	2,000.00	Initialized; Supplier Review		\$ 
 PO000006	Agarwal Manjary	Executed	USD	20,000.00	20,000.00	Initialized; Supplier Review		\$ 

10 Result(s)



Invoicing will occur after a proposal has been awarded and a contract created.

- Select **Orders** and **Acknowledge Orders**.
- Select the pencil icon next to the purchase order that is ready for Supplier review.

Acknowledge the Purchase Order

PO: PO000058 - Copy of Test script1 - TRS Test Supplier - TRS Test Supplier (Exec...

Reject Confirm Create Invoice

Header

Name
Copy of Test script1 - TRS Test Supplier

PO Supplier
TRS Test Supplier

Department
Board of Trustees

Legal Company
TRS

Order Date
4/7/2021

Buyer Contact
R H Meenakshi

Supplier Contact

Currency

Ship to

US
1000 Red River Street
78701 Austin
Texas
UNITED STATES

Delivery & Payment

Payment Terms
30 days invoice date

- Review the information in the purchase order.
- If the information is satisfactory, click **Confirm** to acknowledge the order.
- If the information is not satisfactory, click **Reject** and PAVES will send the task back to TRS. (**Note:** When you reject an order, include the reason in the pop-up comment box)

Create an Invoice

PO: PO000058 - Copy of Test script1 -TRS Test Supplier - TRS Test Supplier (Exec... Q Search ▶ 🖨

Create Invoice

✓ Data has been saved
i Validated successfully

Header

Name
Copy of Test script1 -TRS Test Supplier

PO Supplier
TRS Test Supplier

Department
Board of Trustees

Legal Company
TRS

Order Date
4/7/2021

Buyer Contact
R H Meenakshi

Supplier Contact

Ship to

US
1000 Red River Street
78701 Austin
Texas
UNITED STATES

Bill to

US
1000 Red River Street
78701 Austin
Texas
UNITED STATES

Delivery & Payment

Payment Terms
30 days invoice date

- Once confirmed, click **Create Invoice**.

Create an Invoice

TRSPAVES
Procurement and Vendor e-System

General Info. Solicitation Contracts Orders Invoicing

Admin 5 (TRS Test Supplier)

Invoice

Save Save & Close Validate Cancel Invoice

Invoice header

Supplier Invoice Number* Currency USD

Invoice Date* 6/15/2021

Supplier ACCENTURE

Department 100 - Board of Trustees

Service End Date*

Contact test1 acc

Supplier Remit-To Address*

Buyer Nair Vijith

Payment Information

Payment Terms 30 days invoice date

Due Date

Orders/Contracts

Order PO000145 - Amendment request 5/26/2021 PO000124-ACCENTURE

Contract

Legal Invoice

Click or Drag to add a file

Attached Files

Click or Drag to add files

PAR Form

Click or Drag to add a file

Products / services

Add Order Items

PO / Contract	Item Name	Due	QTY	UP Excl. Tax	Amnt (Excl. Tax)	Diff.
PO000145 - Amendment request 5/26/2021 PO000124-ACCENTURE/1	Bags		20.00	20.00	400.00	
PO000145 - Amendment request 5/26/2021 PO000124-ACCENTURE/2	test		21.00	25.00	525.00	
			1.00			

Comments

- Enter **Supplier Invoice Number**, **Supplier Remit-To Address**, **Invoice Due Date**, and **Service End Date**.
- Attach the **Legal Invoice**.
- Click **Save**

Create an Invoice

Save Save & Close Validate Cancel Invoice

Invoice header

Supplier Invoice Number* Currency

Invoice Date* Contact

Supplier Supplier Remit-To Address*

Department Buyer

Service End Date*

Payment Information

Payment Terms

Due Date

Orders/Contracts

Order

Contract

Legal Invoice

Click or Drag to add a file

Attached Files

Click or Drag to add files

PAR Form

Click or Drag to add a file

Products / services

PO / Contract	Item Name	Due	QTY	UP Excl. Tax	Amnt (Excl. Tax)	Diff.
PO000145 - Amendment request 5/26/2021 PO000124-ACCENTURE/1	Bags		<input type="text" value="20.00"/>	20.00	400.00	
PO000145 - Amendment request 5/26/2021 PO000124-ACCENTURE/2	test		<input type="text" value="21.00"/>	25.00	525.00	
			<input type="text" value="1.00"/>			

- Review the Line Order Items in the Invoice. These line items are automatically loaded and are read-only except for the **Qty** field.
- Enter the Quantity for each line item. (Note: Partial invoices can be created this way.)
- Click **Add Order Items** to deselect/remove invoiceable order items.
- Click **Save**.

Create an Invoice

Invoice INV000067 - 500.00 - Draft - TRS Test Supplier

Save Save & Close **Validate** Cancel Invoice

Fields marked by an asterisk * are mandatory
Expected date format: M/d/yyyy

Invoice header - Draft

Supplier Invoice Number* Currency
INV 97531 USD

Invoice Date*
4/15/2021

Supplier Supplier Remit-To Address Contact
TRS Test Supplier

Department Requisitioner
Board of Trustees

Information
Terms Due Date
Invoice date 5/15/2021

Orders/Contracts
Order
PO000058 - Copy of Test script1 - TR

Contract

Products / services

Message from webpage
Do you really want to validate this invoice?
OK Cancel

- Click **Validate** to send the invoice to TRS.
- Click **OK** to confirm the validation.

Supplier Management for Existing Suppliers

COURSE SUMMARY

Learning Objectives

You should now be able to:



Understand the Navigation within PAVES



Create and submit Supplier Change Requests



Respond to Solicitations in PAVES



Create an Invoice in PAVES