

SUPPLIER GUIDE – RESPONDING TO SOURCING EVENTS

About this Guide

This guide offers directions to suppliers of Worley Group regarding how to handle sourcing events within Coupa, such as RFPs, RFQs, and RFIs.

Sourcing Events

A supplier is invited to participate in a sourcing event through an email notification sent by Worley Group.

Supplier Instructions:

1. Create an account in the Sourcing Response Portal by opening the notification email and click **here** to set up your log in credentials. Note your designated username from the email below.

Worley Sourcing Event - BP Master - Full Sourcing Event Template #108 Invitation

XQuared Roofing has been invited by Worley to participate in a sourcing event for BP Master - Full Sourcing Event Template.

Dear Bidder,

You are invited to submit a Quotation for the above referenced materials, in accordance with the enclosed Instructions to Bidders and all enclosures detailed thereon.

We refer to the attached list of relevant documents (COUPA.ATTACHMENTS). Please check to ensure all the contents listed are in your possession. Your tender should be based entirely on the details contained in this Inquiry package.

We also direct your attention to the Instruction to Bidders. This is important, it contains information on communication during the bid period, terms and conditions, commercial document requirements and bid submission requirements.

Upon receipt of all bids a selection process will determine which bids will go through the evaluation procedure. To assist the engineering process and reduce lead times, we request you provide preliminary layout information with your bid Quotation along with early civil, piping and cabling information, where appropriate.

Regards,

Worley Procurement

You have been given an account on Worley's sourcing system to provide your responses for this Sourcing Event. Before you can login, you need to setup your new password [here](#).

Your username is **xquaredroofing+191@gmail.com_4c**

After setting your password, please [login](#) to provide your responses.

IMPORTANT: You must setup your password within 7 days of receiving this message.



- Input your desired password and click **Change Password**.

Welcome to Coupa!

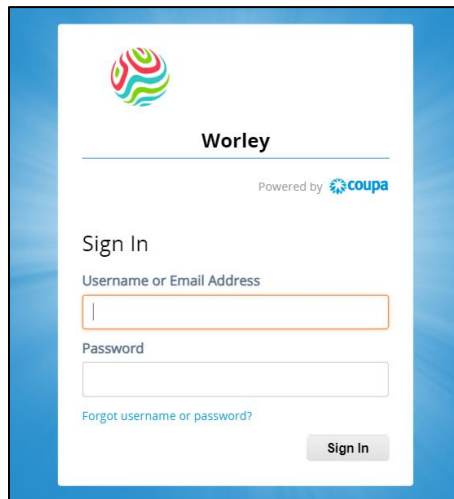
Please enter your desired password, then reenter it for verification.
Your password must be at least 8 characters.

Password

Password Confirmation

Change Password

- Once password has been saved, log in via your designated username from the sourcing email notification and input your newly created password.



The image shows the Worley Sign In page. At the top is the Worley logo, followed by the text "Worley" and "Powered by Coupa". Below this is the "Sign In" heading. There are two input fields: "Username or Email Address" and "Password". A "Sign In" button is located at the bottom right. A link for "Forgot username or password?" is positioned below the password field.

2. You will now be redirected to the Sourcing Response Portal. Click on the Event #.

Welcome to your Sourcing Response Portal!

Supplier has been invited by **Worley** to participate in a sourcing event for **BP Master - Full Sourcing Event Template**. Dear Bidder,

You are invited to submit a Quotation for the above referenced materials, in accordance with the enclosed Instructions to Bidders and all enclosures detailed thereon.

We refer to the attached list of relevant documents (COUPAATTACHMENTS). Please check to ensure all the contents listed are in your possession. Your tender should be based entirely on the details contained in this Inquiry package.

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Regards,

Worley Procurement

All Sourcing Events

Event #	Event Name	Start Date	End Date	Status	Type	Responses
108	BP Master - Full Sourcing Event Template	06/21/24	08/05/24	Prod	RFP	0



- On the Event info tab, acknowledge the event by indicating intent to participate in the event and accept the terms and conditions. Then, Click **Send to Event Owner**

Worley - Complex Packa... - Event #69 Active

Event Ends 45 : 16 days hrs

Remaining time of the event

Event Info

Supplier has been invited by Worley to participate in a sourcing event for **Worley - Complex Package Template**. Dear Bidder,

You are invited to submit a Quotation for the above referenced materials, in accordance with the enclosed Instructions to Bidders and all enclosures detailed thereon.

We refer to the attached list of relevant documents (COUPAATTACHMENTS). Please check to ensure all the contents listed are in your possession. Your tender should be based entirely on the details contained in this Inquiry package.

We also direct your attention to the Instruction to Bidders. This is important, it contains information on communication during the bid period, terms and conditions, commercial document requirements and bid submission requirements.

Upon receipt of all bids a selection process will determine which bids will go through the evaluation procedure. To assist the engineering process and reduce lead times, we request you provide preliminary layout information with your bid Quotation along with early civil, piping and cabling information, where appropriate.

Regards,

Worley Procurement

Do you intend to participate in this event?

Intend to participate in this event
Buyer will be notified of your intent to participate.

Accept Terms and Conditions

Terms and Conditions
[Worley_RFP_Terms_Conditions.docx](#)

Do you accept these Terms and Conditions?

Yes
 No

Send to Event Owner

Check this box to indicate participation in the event.

Select Yes to accept the terms and conditions. Selecting No, supplier will not be able to respond to the event

Review attached documents related to the Terms & Conditions.

Click Send to Event Owner to notify the buyer that you intend to participate

- Scroll down to view event information & bidding rules, buyer attachments, and timeline. Click **Enter Response** to provide a response and submit a bid.

Event Information & Bidding Rules

Event will end at the Event End Time.

Your responses are viewable by buyer once submitted

Buyer may choose to award individual line items

Buyer Attachments

All questions regarding this RFP shall be provided in writing via the Coupa Messaging Center. Completed RFP Submissions and Quotations will only be accepted via Coupa.

Timeline

Jun 6 Event Start 07:28 PM America/New_York 45d : 17h : 0min

Jul 22 Event End 12:28 PM America/New_York 00:00

The start and end date of the event

Enter responses and submit bids

Enter Response

worley DELIVERING SUSTAINABLE CHANGE

6. On the My Response tab, enter Response:

- **Attachments** – Check for provided attachments. A red asterisk next to Attachment indicates a response is required.

Worley - Complex Packa... - Event #69 Active

Event Ends **45 : 16**
days hrs

[Event Info](#) [My Response](#)

Attachments

Provided by April Esteron	Your response
<p>Worley NDA</p> <p>Instructions Please Review/Sign and upload here.</p> <p>Attachment</p> <p> Worley_NDA.pdf</p>	<p>Response to Worley NDA</p> <p>Attachment * Add File</p>
<p>Commercial Bid Clarifications</p> <p>Attachment</p> <p> R2-00KV5-1018-RQ-P0005__Commerci...</p>	<p>Response to Commercial Bid Clarifications</p> <p>Attachment Add File</p>
<p>CBE Evaluation Template</p>	<p>Response to CBE Evaluation Template</p>

[Import from Excel](#) [Save](#) [Submit Response](#)

- **Forms** – Complete any forms provided. Not all sourcing events include a form.



Forms Event Ends: 45 : 16
days hrs

1. Worley - CBC

Please answer the questions below.

General

* Please confirm acceptance of the following Warranty Period: Yes No
 12 months from start-up/commissioning or 18 months from delivery to jobsite, whichever occurs first.

Payment Terms

* Please confirm acceptance of the following payment terms: Yes No
 Net 60 Days from Company/ Buyer Representative receipt of a correct invoice
 100% upon shipment AND receipt of all Vendor Data Requirements per the attached Material Requisition

* Is your bid based on fabrication/ship from location outside of the United States? Yes No

Delivery

* Shipping Point

- **Items and Services** - at the bottom page of the My Response tab, review the list of items and/or services for bidding and enter a bid amount in the Price per Unit field. A red asterisk next to the field indicates that an input is required.

Items and Services Event Ends: 45 : 16
days hrs

Items Not In Lots (2 items)

Centrifugal Pump				500.00 USD	>
Expected Quantity x Price per Unit					
Expected Quantity	Capacity	* Price per Unit	* Currency		
1 Each	1	500	USD		
IT Services				0.00 USD	>
Price per Unit					
* Price per Unit	* Currency				
	USD				

* Required field

Total 500.00 USD

Note: To include additional information, expand the line item by clicking the arrow above. In the expanded view, enter additional information and click **Save**.



Items Not In Lots (2 items) Event Ends **45 : 16**
days hrs

Centrifugal Pump

Need By Date	Ship To Address	Details	Request Details
	No address selected		No Request Details Present

Capacity	Expected Quantity	* Price per Unit	* Currency
<input type="text" value="1"/>	1 Each	<input type="text" value="500"/>	USD

Supplier Item Name	Item Description	ID/Part Number	Lead Time (days)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Attachments
Add [File](#) | [URL](#) | [Text](#)

If the Event contains several line items and/or if you want to answer the forms or questionnaires via Excel, click **Import from Excel**....

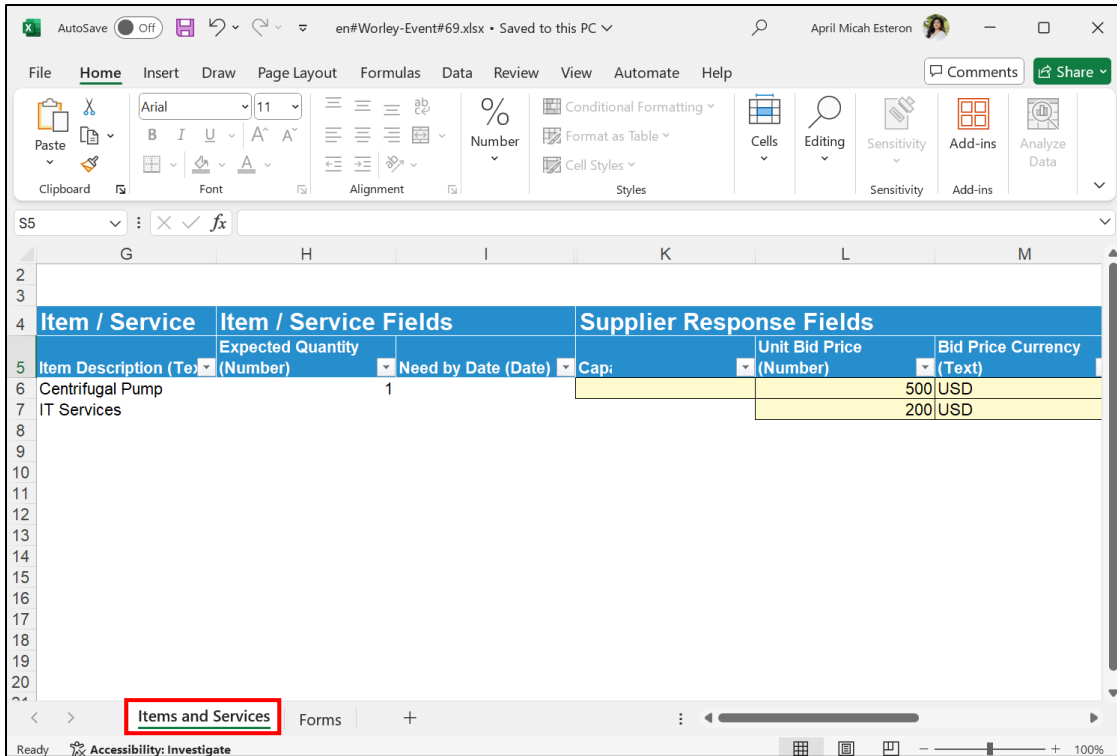
...then click download the **Response Template** to complete the item details and/or forms in an Excel spreadsheet.

Steps for uploading your response in Excel

1. Download the Response Template Note: This template will only work for this event
2. Fill in or update the Excel file.
Fields marked with a "*" are mandatory. Do not unlock/unprotect the Excel file if you plan to upload it.
Values in the uploaded file will replace anything currently saved to your response.
Once you click "Start Upload" values in the excel file will be saved, but not submitted.
Once upload is complete, review your response and click "Submit." Your response will not be sent until you do so.
3. Load the updated file
 No file chosen
Uploading will only save your response. You must click "Submit" to send it to the buyer.

You have the option to fill out either 'Items and Services' tab or 'Forms' tab or both. The cells in yellow are the only ones that need to be populated, but some are not required.





Item / Service	Item / Service Fields	Supplier Response Fields
Item Description (Text)	Expected Quantity (Number)	Unit Bid Price (Number)
Unnamed Item	Need by Date (Date)	Bid Price Currency (Text)
	Capacity (Number)	Lead Time (Integer)
	1	Supplier Item Name (Text)
		Item Part Number (Text)
		Item Description (Text)

Supplier Response Fields						
Capacity (Number)	Unit Bid Price (Number)	Bid Price Currency (Text)	Lead Time (Integer)	Supplier Item Name (Text)	Item Part Number (Text)	Item Description (Text)
1		USD				

The table below summarizes the fields in the **Items and Services** tab, including which fields are required to be populated.

Field Name	Unit	Required?	Description
Capacity	Number	No	Indicates the number of items to bid. However, this cannot be more than the Expected Quantity (Number).
Unit Bid Price	Number	Yes	This is the Price Per Unit field where you will indicate how much you are bidding the item per quantity.
Bid Price Currency	Text	Yes	Select from the dropdown on which currency you'd like to bid on.
Lead Time	Integer	No	Lead time in Days - aims to support delivery time requirements by measuring the time it takes for a product to arrive at its end



			destination after an order has been placed. Populate only if applicable.
Supplier Item Name	Text	No	Name of item being bid on.
Item Part Number	Text	No	Each item may have its own item part number. Populate only if applicable.
Item Description	Text	No	Description of the item.

In the **Forms** tab, the yellow cells in Column H are required to be filled out.

The screenshot shows an Excel spreadsheet with the following data:

	Type (Text)	Required (Text)	Answer
Distance of the following Warranty Period:	Radio Buttons	Yes	
Distance of the following payment terms:	Radio Buttons	Yes	
fabrication/ship from location outside of the United States?	Radio Buttons	Yes	
	Text Field	Yes	
	Text Field	No	
bid explicitly states the ARAD and ARO	Radio Buttons	Yes	
assumptions is clearly stated	Radio Buttons	Yes	
awing schedule (in Weeks) ARO	Text Field	Yes	
bid is valid for 90 days from the date of original offer	Radio Buttons	Yes	
bid is firm	Radio Buttons	Yes	
ere will be no additional cost for Documentation, Testing and Packaging	Radio Buttons	Yes	
it and forecast shop capacity / shop loading for the next calendar year	Text Area	Yes	
r company is encountering or foresees any COVID-19 related supply chain / logistics	Radio Buttons	Yes	
r company foresees any other potential risks or impacts	Radio Buttons	Yes	
pplicable Commissioning Spares and/or 2 Years Operational Spares are included in	Radio Buttons	Yes	

Once done, save the Excel file and click **Choose File** to load the spreadsheet. Click on **Start Upload** and a green banner showing “Excel import successful. Remember to submit your changes below.” will appear.

Steps for uploading your response in Excel

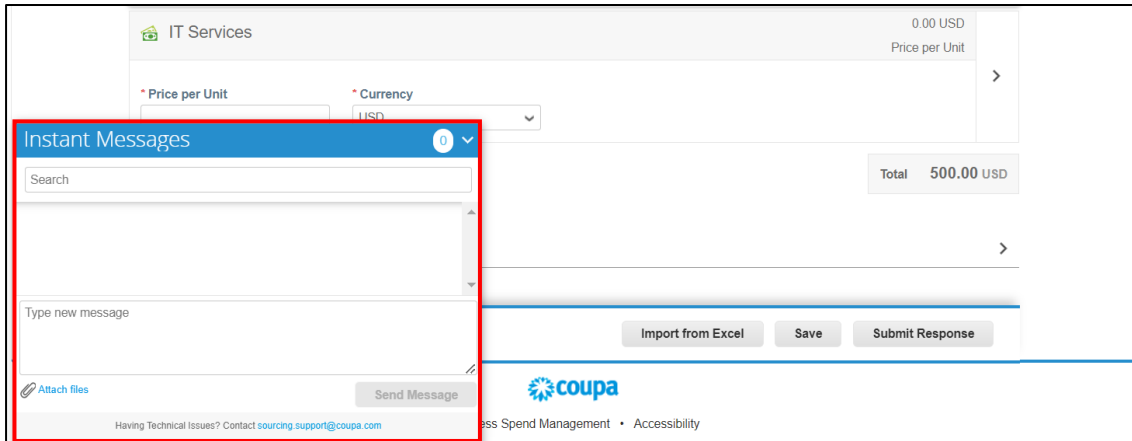
- Download the [Response Template](#) (Note: This template will only work for this event)
- Fill in or update the Excel file.
 - Fields marked with a "*" are mandatory. Do not unlock/unprotect the Excel file if you plan to upload it.
 - Values in the uploaded file will replace anything currently saved to your response.
 - Once you click "Start Upload" values in the excel file will be saved, but not submitted.
 - Once upload is complete, review your response and click "Submit." Your response will not be sent until you do so.
- Load the updated file
 - Choose File** en#Worley-Event#69.xlsx
 - Uploading will only save your response. You must click "Submit" to send it to the buyer.

Start Upload

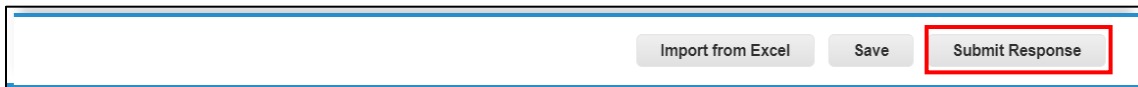


- **Instant Messages Board** – ask questions or request clarification from Worley while the event is open.

Note: answering questions promptly through Coupa will reduce the need to call or email Worley. Additionally, the message board stores all questions and answers within the event for future reference and audit.



7. To submit the response, click **Submit Response**. Worley will receive a notification that the response was submitted.

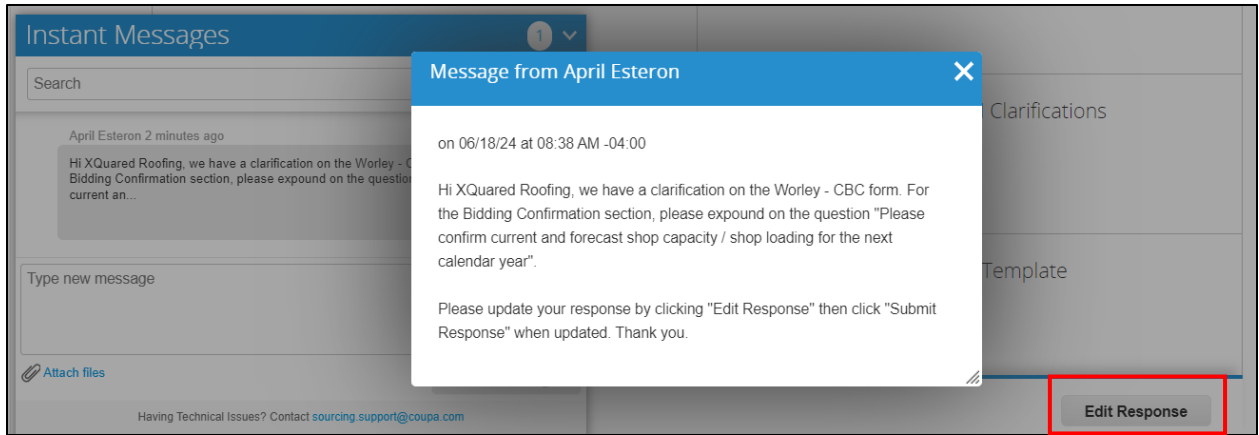


8. Worley will review and evaluate supplier responses and follow up as required. See the event terms and conditions for any further information.

Note: How to reply to the Worley CBC (Commercial Bid Clarification) Form: Should there be clarifications required on the form, please follow the steps below.

1. Submit Response as indicated in step #5 above. This will enable Worley buyers to see the supplier's response and review the Worley CBC form.
2. Worley buyer will send a message to the supplier via Instant Messages board. The supplier will then receive the message. If needed, attachments can also be sent both by the buyer and supplier.
3. Click on **Edit Response** to make changes on the form.





4. Upon editing the Worley CBC form, click **Submit Response** again for the Worley buyer to receive it. This will be repeated as needed, should there be any additional clarifications needed from the Worley buyer.

