

Vendor Performance Management Industry Tips and Tricks

Upon Receipt of an Evaluation

Step 1: Log In to www.merx.com or click on the link within the e-mail notification.

Step 2: Select Performance Management.

Step 3: Search by the Project Number (or the e-mail notification will take you directly to the evaluation after the log on screen).

Step 4: Click on the Project Number link.

Step 5: The Project Field will provide basic information about the Project.

Step 6: The History Field will provide information about open appeals and or appeal decisions.

Step 7: The Vendor Performance Field will forward you to the evaluation.

Step 8: Click on the Vendor Performance ID.

Step 9: Scroll down to Review the Evaluation.

Step 10: Click on either Review or Appeal.

Step 11: Add comments and Attachments as appropriate. Appeal decisions require substantiated information.

Step 12: Complete Compliance and Authentication by adding your full name and password.

History and Project Score Details

Step 1: Click on the “City of Ottawa “ Vendor Score within the My Account screen.

Step 2: View Vendor Score by Performance Program which includes the following;

- * Vendor score

- * Score by Performance Criteria

- * Link for each project will take you directly to the evaluation.

Step 3: Expand and View the Performance Evaluations by Category; contractor, consultant, contract administration.

Reviewing an Appeal Decision

Step 1: Log In to www.merx.com or click on the link within the e-mail notification.

Step 2: Follow steps 2 through step 9 in the Upon Receipt of an Evaluation section.

Vendor Information and Reviewing the Overall Vendor Score

Step 1: Click on the My Account icon on the top right of the screen.

Step 2: Click on Vendor Score.

Step 3: Review the Overall Vendor Score in the Vendor Score Box.

Providing MERX Vendor Account Information to the City

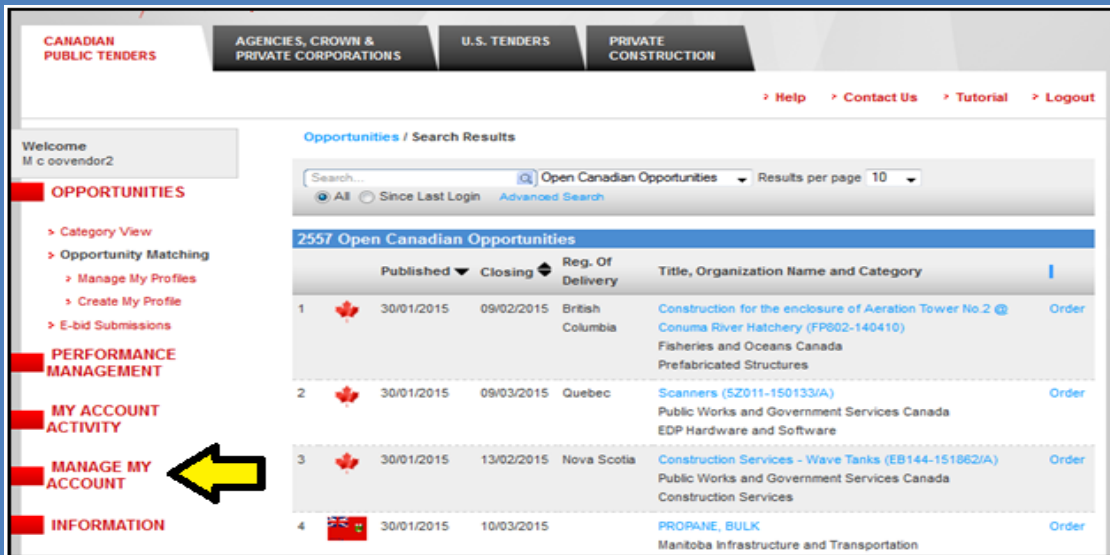
Through your organization's MERX account, vendor users will be able to receive evaluation updates, access your evaluation records and file an appeal.

NOTE: To access the VPM module, your MERX account needs to have an *annual Complete Canadian Public Tenders* subscription.

In order to correctly link your organization's account to performance evaluations, your City Project Manager and/or Purchasing Officer will ask for your **MERX organization #** and your **designated VPM contact** who will be linked to the VPM evaluations for that project.

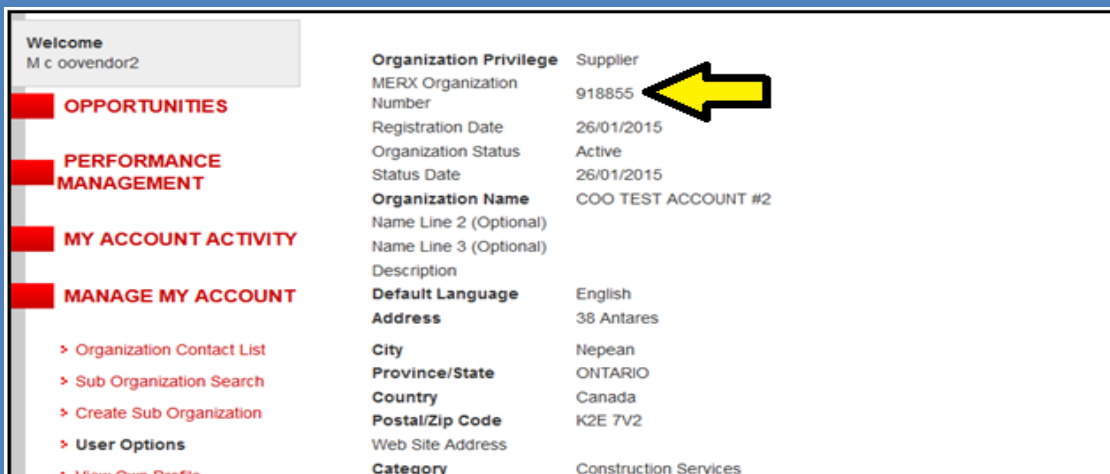
Steps to get this information:

1. Have one of your MERX users log on to your account – www.merx.com and click on "Manage my Account":



The screenshot shows the MERX user interface. The top navigation bar includes 'CANADIAN PUBLIC TENDERS', 'AGENCIES, CROWN & PRIVATE CORPORATIONS', 'U.S. TENDERS', and 'PRIVATE CONSTRUCTION'. The main content area is titled 'Opportunities / Search Results' and displays a table of 2557 Open Canadian Opportunities. A yellow arrow points to the 'MANAGE MY ACCOUNT' link in the left-hand navigation menu.

2. Your **MERX organization #** will appear:



The screenshot shows the 'Organization Privilege' section of the MERX user interface. The 'MERX Organization Number' is highlighted with a yellow arrow. The 'Organization Name' is 'COO TEST ACCOUNT #2'.

Organization Privilege	Supplier
MERX Organization Number	918855
Registration Date	26/01/2015
Organization Status	Active
Status Date	26/01/2015
Organization Name	COO TEST ACCOUNT #2
Name Line 2 (Optional)	
Name Line 3 (Optional)	
Description	
Default Language	English
Address	38 Antares
City	Nepean
Province/State	ONTARIO
Country	Canada
Postal/Zip Code	K2E 7V2
Web Site Address	
Category	Construction Services

Providing MERX Vendor Account Information to the City

3. **If your organization's MERX account only has 1 user, that individual will be the one linked to VPM evaluations.** If you have multiple users, you can view them by clicking "Organization Contact List" and informing the City who you want as the **designated VPM contact**:



The screenshot displays the user interface for a MERX Vendor Account. At the top left, a 'Welcome' message is shown for user 'M c coovendor2'. The main heading is 'ORGANIZATION NAME: COO TEST ACCOUNT #2'. Below this is a table with the following data:

CONTACT NAME	USER ID	ROLE	CONTACT STATUS
coovendor2, c	coovendor2	Supplier Coordinator	Active

A yellow arrow points to the 'CONTACT NAME' cell of the table. Below the table, the word 'Contacts' is displayed in a large, bold font.

The left sidebar contains the following menu items:

- OPPORTUNITIES
- PERFORMANCE MANAGEMENT
- MY ACCOUNT ACTIVITY
 - > Organization Profile Maintenance
 - > Create Organization Contact
- MANAGE MY ACCOUNT
- INFORMATION

4. **Vendors without a MERX account will have a system e-mail sent to them giving the option to subscribe** in order to access bid opportunities and their VPM evaluation records. The City will still perform and track VPM evaluations on vendors who do not subscribe with MERX.