

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.

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.

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.

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 website interface. The left sidebar contains a navigation menu with the following items: **OPPORTUNITIES**, **PERFORMANCE MANAGEMENT**, **MY ACCOUNT ACTIVITY**, **MANAGE MY ACCOUNT** (highlighted with a yellow arrow), and **INFORMATION**. The main content area displays '2557 Open Canadian Opportunities' with a table listing various projects. The table has columns for Published, Closing, Reg. Of Delivery, Title, Organization Name and Category, and an Order link. The first four rows of the table are visible, showing projects from British Columbia, Quebec, Nova Scotia, and Manitoba.

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

The screenshot shows the 'Organization Privilege' section of the MERX website. The left sidebar is the same as in the previous screenshot. The main content area displays the 'Organization Privilege' section, which includes a table with the following information:

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

The 'MERX Organization Number' (918855) is highlighted with a yellow arrow.

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 MERX Vendor Account interface. On the left is a sidebar with navigation links: OPPORTUNITIES, PERFORMANCE MANAGEMENT, MY ACCOUNT ACTIVITY, MANAGE MY ACCOUNT (with sub-links for Organization Profile Maintenance and Create Organization Contact), and INFORMATION. The main content area shows the organization name "COO TEST ACCOUNT #2" and a table of contacts. A yellow arrow points to the first contact, "coovendor2, c", with the word "Contacts" written next to it.

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

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.