**CONFIDENTIAL**

**Request for Proposal / Quote**

**for  
Merck Life Sciences  
QM / P2P Portal**

Date issued: **31 Jan 2018**

**THIS IS AN INVITATION TO BID ONLY**

In reading or responding to this Request for Proposal (“RfP”) prepared by the Merck Group you acknowledge and agree that this RfP does only constitute an “invitation to bid” and does not constitute a binding offer to purchase any services or products from you and no such obligation will exist for the Merck Group or any affiliates of the Merck Group until a definitive contract covering such services and/or products has been executed between you and the Merck Group. You further acknowledge that the Merck Group will not be liable to you for any costs, loss, damages, termination fees or any other compensation if no award is made and no legally binding contract is entered into with you.

Any information contained in this RfP as well as this RfP process is confidential. In reading or responding to this RfP you acknowledge and agree that the information contained in this RfP is provided to assist you in submitting a formal proposal to provide the services or products as specified or requested herein; except with the express written consent of the Merck Group such information may not be published, disclosed for any other purpose. In the event that the Merck Group receives notice that any information contained in this RfP has been misappropriated or disclosed contrary to this RfP, the Merck Group reserves its rights to use any and all legal or equitable remedies available to it in order to prevent such violative behavior. Without limiting any other action that the Merck Group may take, any such violative behavior may result in the immediate exclusion from the evaluation process.

In case that your proposal is not considered or in case that you elect not to submit a proposal, the Merck Group requires you to return or destroy this RfP as well as all related information ("Information") and any electronic copies thereof and to confirm in writing that the Information has been destroyed or returned.

The information in this document may contain “forward-looking statements” about the expected future businesses of the Merck Group. These statements are based on the current expectations of The Merck Group and are inherently subject to uncertainties and changes in circumstances.

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# Confidentiality statement

Without limiting the generality of Clause 3.3 of the RfP, the information contained in this RfP is considered confidential and all recipients are asked to refrain from discussing the contents with anyone not directly involved with responding to this RfP and that the information contained herein is shared with only those persons in your organization bound in writing to maintain sponsor, research partner information as confidential. Merck reserves the right to disqualify or reject the response of suppliers who it has reason to believe violated these guidelines.

# Introduction

## Information about Merck

For further information regarding Merck please visit our internet page:

[Merck Company](http://www.merckgroup.com/en/company/company.html)

(<http://www.merckgroup.com/en/company/company.html>)

## Merck Responsible Sourcing Principles:

[Sourcing Principles](https://www.merckgroup.com/content/dam/web/corporate/non-images/company/responsibility/en/regulations-and-guidelines/responsible-sourcing-principles.pdf)

(https://www.merckgroup.com/content/dam/web/corporate/non-images/company/responsibility/en/regulations-and-guidelines/responsible-sourcing-principles.pdf)

## General Information for Suppliers:

[Supplier Information](http://www.merckgroup.com/en/contact/Supplier_information.html)

(<http://www.merckgroup.com/en/contact/Supplier_information.html>)

## Code of Conduct:

[Code of Conduct](https://www.merckgroup.com/content/dam/web/corporate/non-images/company/responsibility/en/regulations-and-guidelines/code-of-conduct.pdf)

(https://www.merckgroup.com/content/dam/web/corporate/non-images/company/responsibility/en/regulations-and-guidelines/code-of-conduct.pdf)

## Privacy Statement:

[Privacy Statement](http://www.merckgroup.com/en/privacy_statement/privacy_statement.html)

(http://www.merckgroup.com/en/privacy\_statement/privacy\_statement.html)

## Present Situation

For procurement, an Oracle Portal is being used to provide consignment data and processing of a purchase requisition. We need to provide a subset of the Oracle functionality in a new vendor portal.

For QM, there are multiple systems being used to process data and a manual process is used to enter the information in the fillable forms

## Introduction and Scope of the Project

The project has been implemented to offer a dynamic and automated service for procurement and quality employees along with the existing vendor pool. The portal will allow the users to work within a stand-alone web-based or a hosted cloud based secured environment. The portal’s functionality is required to promote vendor interaction that will reduce the MilliporeSigma workload in quality management, procurement consignment orders, and will also improve communication by storing comments and requests. The nature of the portal content is mostly non-sensitive but is comprehensive and can be in the form of web entry and independent downloaded and uploaded documents. The portal should not be complex and provide a user-portal like experience with the intention of creating a solution that will scale and allow for the possibility of adding additional form and functionality capabilities at a later point and/or as needed.

The basic functional requirements of the project include the following

* Create and manage a user profile
* The ability to upload, store, and manage individual documents (i.e. PDF, Microsoft Applications and others.)
* The ability to save and return and complete associated web forms
* Auto-populate predetermined segments of user entered and uploaded content to SAP
* Complete calculations based on data provided by SAP including graphs and status bars.

The scope of this project includes conducting a comprehensive needs assessment, design and development, as well as options for either offering (1) a fully hosted and managed solution, or (2) deployment of a solution on-premise server infrastructure. A successful bid will also include the following criteria:

* Visually and aesthetically pleasing web application design
* User-friendly environment that is easy to navigate
* Consistency of design across all pages/sections using a design theme that models current MilliporeSigma logo and color schemes
* Application has an administrator interface and functionality allowing for support requests for identity management tasks as well as control other configurable features
* All software and licensing requirements should be included as part of this project
* Application should be compatible with all current web browsing technology and offers clear path to upgrade and feature add-ons
* Ability to work closely MilliporeSigma personnel on coordination of tasks, timelines, and allocation of resources towards project completion
* Quality assurance testing conducted and reported prior to launch

**Portal Structure and authorizations**

The design of the portal should allow for scalability and authorization per topic and based on this may be required in phases based on the following priorities.

**Priority 1** – Development of the portal structure (without content) for both Quality and Procurement

1. Home page
2. Administrator page with table to hold user values
3. Consignment Cockpit - Procurement
4. Consignment Payments - Procurement
5. Consignment Purchase orders - Procurement
6. Consignment Stock movements – Procurement
7. Forms Management – Quality
8. Tasks / Notifications – Quality
9. Roles and authorizations

**Priority 2** – Consignment Dashboard

* A list of all consigned materials will display using an RFC call for real time stock quantities.
* MilliporeSigma will provide the fields that will display in the report format.
* A graphic that displays available, ordered, in transit stock will be displayed with min max quantities determining the color of the section of the graphic – green will be above minimum, red below minimum.
* The vendor will enter a quantity to be ordered and save which will RFC real time to SAP.

**Priority 3 –** Consignment Invoices

* When a vendor is logged in, this tab should contain 2 years of the vendor’s applicable payment history.
* The vendor or buyer should be able to sort, filter, and download a file.
* The data will be provided nightly by SAP via an RFC file. The fields for the list will be provided by MilliporeSigma.
* It should also contain a comment/note section with history. When a note is created and saved, it should trigger a notification to the email address selected.

**Priority 4 –** Consignment Purchase orders

* This tab should contain 2 years of applicable purchase order history.
* The vendor or buyer should be able to sort, filter, and download a file.
* The data will be provided daily by SAP via an RFC file. The fields for the list will be provided by MilliporeSigma.
* An action button to create an ASN will also be required. The ASN will RFC real time to SAP with MilliporeSigma provided fields.
* It should also contain a comment/note section with history. When a note is created and saved, it should trigger a notification to the email address selected.

**Priority 5** – Consignment Material movements

* This tab should contain 2 years of applicable consignment material movement history.
* The data will be provided nightly by SAP via an RFC file. The fields for the list will be provided by MilliporeSigma.
* The vendor or buyer should be able to sort, filter, and download a file.

**Priority 6** – Fillable forms – Quality (COO document)

* The ability to use a web form that would capture field data and push to SAP in a real time RFC call.
* The forms contain a list of questions that should have guided logic to determine the next question.
* Questions can be single answer, free text, multiple choice and drop down.
* Collaboration of forms where a document can be saved and reopened calling all existing field previously populated. Update of existing field information is possible. The format of the date field will be dd/mmm/yyyy.
* E-signature functionality
* Required and non-required fields
* Expandability and flexibility of the web form so more questions/answers can be added, updated or removed.
* Ability to add more forms.
* Color coded status of web form (complete - green, pending – yellow, overdue – red)

**Priority 7** – List of COO related Purchase order line items

* Priority 7 and Priority 8 go together.
* The vendor or QM should be able to sort, filter, and download a file of the purchaser orders
* The purchase order should contain a link to the web form
* Worksheet type layout for the Purchase order line item list
* Color coded status of web form (complete - green, pending – yellow, overdue – red)

**Priority 8** – Forms management – Quality

* Track documents
* Review documents
* Approve completed document
* Send documents to SAP repository
* Temporary storage on the portal of documents
* It should also contain a comment/note section with history. When a note is created and saved, it should trigger a notification to the email address selected.
* Supplier should see the list of actionable documents
* Download template, update template offline, and re-upload template
* Mass upload and download for files
  + Multiple downloads of templates
  + Mass upload of files to match document type
  + Track documents with color coded status (complete - green, pending – yellow, overdue – red)
* All file types need to be supported
* E-signature when uploading the document
* Required and non-required fields
* Upload and store template documents on the web which can be opened in the portal or downloaded.
* Partially completed documents can be saved on the portal and reopened later for completion.

**Bid submission variations**

1. Price for the Quality piece only
2. Price for the procurement piece only
3. Price for the hosted Cloud solution
4. Price for an In-house solution

Please review and bring your questions to an hour long fact-finding meeting which will be held February 11-12, 2019. Times will be communicated next week.

# Response Instructions

**The following Section provides instructions on the process on how to respond to this RfP.**

## Authorized Official and Binding Character

Any response to this RfP (**“Proposal”**) must be dated and signed by an official authorized person to bind the Supplier and must represent a firm offer, that shall be the basis of any further negotiations, unless the Merck Group requests changes. Supplier is aware that any portion of the Proposal may be incorporated into a definitive agreement.

## Entry Deadline and Validity of the Proposal

Proposals received after the date mentioned in Clause 2.5, will not be considered and will be rejected (**“Entry Deadline”**). The Proposal must be valid for a period of at least 6 months from the Entry Deadline.

## Reliance on Proposal

The Supplier acknowledges and agrees by submitting its Proposal that (i) it has examined this RfP and has fully understand the Project, (ii) is satisfied with the information contained in this RfP or any additional information requested from the Merck Group and (iii) that the Proposal is predicated upon all information received from the Merck Group (incl. information contained in this RfP) and all terms and conditions of this RfP. The Merck Group shall be able to rely on any statements contained in a Proposal.

## Seek for Clarification

Suppliers may ask for clarification to the RfP until the date as mentioned in Clause 2.5. After this point in time, no further questions will be accepted from any Supplier. Questions must be documented in Schedule 1-4 (Q&A-Template) in a single Email - whenever possible - and send to contacts as mentioned in Clause 2.3.

Answers to questions raised and the questions themselves may be made available to all Suppliers in the Merck Group’s discretion solely, although the Merck Group makes no commitment to do so.

## Communication

To ensure a fair evaluation process and except for questions submitted in accordance with the above-mentioned Section, the Merck Group requires that no further communication takes place between the Merck Group and the Supplier unless such communication is initiated by the Merck Group or is unrelated to the RfP.

Under no circumstances shall any Supplier (incl. its employees) be entitled to contact any Merck Group personnel other than mentioned below with regard to this RfP or any information contained herein.

|  |  |  |
| --- | --- | --- |
| **Contact Name** | **e-mail address** | **department** |
| Niranjana Rajappa | [Niranjana.rajappa@merckgroup.com](mailto:Niranjana.rajappa@merckgroup.com) | Procurement |
| Shivananda Mathad | [Shivananda.mathad@merckgroup.com](mailto:Shivananda.mathad@merckgroup.com) | ITBF Architecture Expert |
| Debbie Miller | [Debbie.miller@milliporesigma.com](mailto:Debbie.miller@milliporesigma.com) | ITBF Solution Expert |
| Udo Zabel | [Udo.Zabel@milliporesigma.com](mailto:Udo.Zabel@milliporesigma.com) | IT Architecture Expert |
| Rashmi Raj Tripathy | [rashmi-raj.tripathy@merckgroup.com](mailto:rashmi-raj.tripathy@merckgroup.com) | IT Architecture Expert |

## Delivery requirements

The Proposal must be submitted as follows:

* One pdf file - zipped and e-mailed to the following Email address mentioned in Clause 2.3
* The Proposal (irrespective the format) must clearly identify the Supplier (name, address) and the key contact persons (names, email-addresses, telephone no.). Each page of the Proposal must be dated and numbered.
* Any supporting document must be clearly marked as such and the Supplier must clearly identify how they integrate with and support the Proposal.
* The Proposal must be in English language.
* The Proposal must be accompanied by a cover letter. The cover letter must certify the accuracy of all information in the Proposal and acknowledge the Proposal to be bound by and comply with the terms set forth in the RfP. Furthermore the cover letter shall include a high-level table of the Proposal ‘s content specifying all proposal documents and their respective content.
* The Proposal must be precise and complete. In the event that Supplier does not respond to all tables of content or items contained therein, as set forth in Schedule 1 to this RfP, Supplier must clearly identify and highlight the respective table or item as “*not answered*”. Reponses that are not directly addressing the questions or requirements will be interpreted as an inability of Supplier to satisfy the Merck Group requirements.
* The Supplier must identify all assumptions on which the Proposal is based on and any consequences a non-occurrence would have in Schedule 1-2 (Risk Template) and Schedule 1-3 (Assumptions Template).
* The Proposal must be separated in a management summary (not more than [2] pages) and in a technical / functional and a business part.
* The Proposal must not exceed the size of [40] pages.
* Standard Sales and Marketing information must not be included in the Proposal but may be submitted as additional information if relevant for the evaluation process.
* The Supplier shall be solely responsible for all costs incurred by preparing and submitting the Proposal.
* The Supplier must identify all sub contractor(s) the Supplier intends to use during the term of the contract by name, address and contact person(s) and any existing corporate or operative relationship. Supplier shall also identify the services it intends to subcontract and shall specify in reasonable detail the rationale behind as further specified in Schedule 6.
* The future contract/SoW will be governed by the Master Service Agreement (MSA) in place, if any. If no MSA is in place yet, Merck will provide MSA templates to the shortlisted suppliers.

## Envisaged Time Lines

The Merck Group may change the dates below at its sole discretion and convenience:

|  |  |
| --- | --- |
| Latest submission of clarification questions | February 8 2019 |
| Q&A- and Solution Review Sessions: | February 11-12, 2019 |
| Supplier to submit its proposal: | February 22 2019 |
| Optional Walk-through of proposal between MERCK and Supplier: | CW7 |
| Intended start of the project: | March 1, 2019 |

# Terms of RfP

## General

At any point throughout the RfP process the Merck Group may:

* Cancel or withdraw this RfP or the RfP process;
* Alter the requirements of this RfP or the Project. In this event, the Merck Group will notify each Supplier of such change and will request the Suppliers to adopt their responses accordingly; or
* Conduct additional investigations regarding the qualification of each Supplier.

## Compliance with law

By virtue of submitting its signed response, the Supplier guarantees that the information and materials provided conform to and comply with all applicable laws.

## Confidentiality and Ownership

This RfP and other related documents and information obtained in subsequent communication with the Merck Group or any of its Affiliates shall be considered and treated as confidential and shall not be disclosed by the Supplier to any third party except to Supplier’s and Supplier’s Affiliates’ employees, external counsels and advisors on a need-to-know- basis, or as the case may be, with the Merck Group’s prior written consent. Supplier must not copy or duplicate neither the RfP nor any other related document or information obtained during the RfP process from the Merck Group or any of its Affiliates, except as necessary for the preparation of a response to this RfP.

In addition to the obligations provided by this Section, the Merck Group may at any time prior to or during the RfP process ask Supplier to execute a separate non-disclosure agreement.

This RfP and any related information provided by the Merck Group during the RfP process shall remain the sole property of the Merck Group and shall be immediately returned or destroyed by the Supplier, if so requested by the Merck Group.

All responses by Supplier to this RfP, including, but not limited to documentation and information submitted together with the response to this RfP (such as due diligence reports) will become the property of the Merck Group and the Merck Group shall at all times be entitled to share the information in such responses with any of its Affiliates, counsels or its external advisors.

**Thank you very much in advance for your response.**