United Nations Development Programme

eTendering User Manual for UNDP Users

JUNE 2016

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1   INTRODUCTION

eTendering is an Atlas module that enables UNDP buyers to manage tender processes online. It is integrated with other Atlas module and links to other steps such as Requisition, Vendor creation and Purchase Order. It brings considerable benefits to both UNDP users and the bidder, such as:

- Automates and streamlines several parts of the procurement processes;
- Enables cost savings by eliminating or automating several actions in the tender process, such as public bid opening and non-award notifications;
- It is fully integrated in Atlas and as such provides UNDP with valuable data for strategic decision making;
- Provides an audit trail for all actions in a tender process;
- Serves as a digital online document repository which enables a greener and more sustainable office;
- Increased bidder confidence in UNDP tender processes;
- Streamlines the bidding process for bidders

As of May 2016, eTendering has been implemented in 25 UNDP Country Offices and used for over 600 tender processes. The system is soon expected to be rolled out across UNDP and thereafter all UNDP Country Offices will use the system for all International Competition tenders. Country Offices are also encouraged to use the system also for local competition because of the added value in transparency and efficiency that eTendering brings to the procurement process.
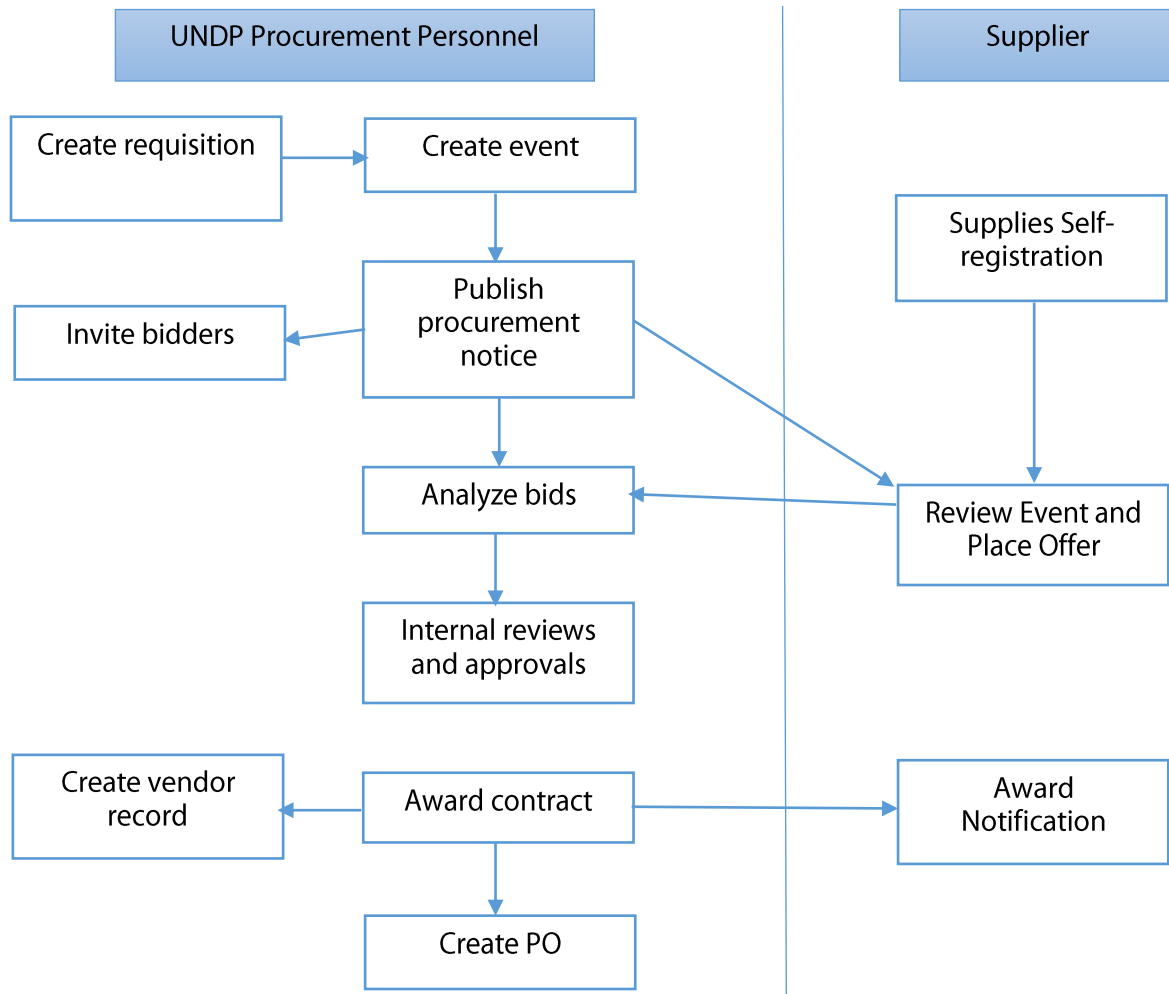
The Procurement Services Unit (PSU) in both New York and Copenhagen provides constant support to eTendering users through trainings, resource materials and ad-hoc support as needed.

This guide will start by describing eTendering and the preparations the procurement focal point need to consider before initiating a process in the system. From section 5 and onwards, the guide will instruct the steps to be followed to set up and manage a bidding event in eTendering.

Before initiating the use of eTendering in a Country Office, both this guiding document and the User Instructions for Bidder should be read, to get a comprehensive understanding of the system from the perspectives of both UNDP Focal Point and Bidder.

This document should also be considered as a simplified guide. If there is any hesitation as to which procedure to follow in eTendering, please contact PSU for further guidance.

1.1　eTendering BUSINESS FLOW

UNDP Procurement Personnel	Supplier

Create requisition → Create event

Create event → Publish procurement notice

Publish procurement notice → Invite bidders

Supplies Self-registration

Publish procurement notice → Analyze bids

Publish procurement notice → Review Event and Place Offer

Supplies Self-registration → Review Event and Place Offer

Review Event and Place Offer → Analyze bids

Analyze bids → Internal reviews and approvals

Award contract → Create vendor record

Award contract → Create PO

Award contract → Award Notification

2   eTENDERING AT A GLANCE

The section below is a quick summary of the steps followed in eTendering system. It is highly recommended users read the full instructions for proper understanding and usage of the system.

2.1   Create an event

Modify an Event

Event Summary

Business Unit: UNDP1   Event ID: 0000000691   Round: 1   Version: 1   Event Format: Buy

Event Type: RFx
Event Status: Open
*Event Name: User Guide
Descr: ❶

Preview Date: 05/07/2016 10:13AM EDT ❷
*Start Date: 05/07/2016 10:13AM EDT
*End Date: 26/07/2016 10:13AM EDT
Copy From: [▼] [Go] ❸

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

* Event Settings and Options   Payment Terms and Contact Info
Event Comments and Attachments ❹
Event Header Bid Factors

Step 2: Configure Line Items
Create line listings for this event.

* Line Items ❺   Item Line Defaults

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

* Bidder Invitations ❻

Step 4: Invite Collaborators
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

Event Collaborators

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

[Save Event] ❼ [Post] ❽ [Save As Template]   [Preview PDF]   [Approver List] ❾

Related Links:

Document Status Inquiry   Plan Task Associations

ℹ️ Last Updated By: elisabet.lundqvist 28/06/2016 04:13 PM EDT

[🔍 Return to Search] [🔄 Refresh]   [➕Add] [Update/Display]

	eTendering reference	Document reference	Detailed description
1	Event Name Descr.	*5.1.2* *Amend Event Summary*	Title of the tender process. In this field, the buyer should copy/paste the front page of the solicitation document. This information is captured in the PDF file generated by system and the email notifications sent to bidders.
2	Preview Date Start Date End Date	*5.1.2* *Amend Event Summary*	The date on which the bidders can view the event and download attachments in eTendering. The date on which the bidders can start submitting bids. The deadline for submission of bids. System is set in New York timezone.
3	Copy From:	*5.1.1* *Copy Template*	The buyer can copy details to the event from a template or a previous event by following the link.
4	Event Settings and Options Event Comments and Attachments Event Header Bid Factors Payment Terms and Contact Info	*5.1.3* *Define Event Basics*	Defines whether partial bidding is allowed (Bid Required On All Lines) and if multiple bids are allowed (Alternate Bids Allowed). The buyer can upload any attachments that the bidders can view and download. File names must be shorter than 60 characters and cannot contain special characters and non-English Alphabet. Questions can be set up to which the bidder should provide their answer when submitting their bid. The questions can be mandatory (Response Required) and have a correct answer (Ideal Response Required), for example "Yes". Pay attention to how and when "Ideal Response required" is selected. The buyer can choose whether multiple currencies are allowed, define payment terms, and provide contact details to the focal point of the tender. If other bid currencies are allowed, make sure the exchange rate is adjusted to match bid deadline.
5	Line Items	*5.1.4* *Complete price schedule & copy from requisition*	The price schedule is added here, including Atlas Item ID, quantities and line comments. From here, the buyer can also copy details from requisition, in which case the COA will also be copied to the Purchase Order at a later stage. Check "Bid quantity" rule at advanced definition to control fix bid quantity. Check and clear comments that may be copied from eRequisition.
6	Bidder Invitations	*5.1.5 Define Bidder Invitations*	Defines whether the tender is open or limited competition. Bidders that are registered in eTendering can be added for direct invitation to the event, and bidders that are not registered can be notified by email for open competition events only.
7	Save Event		When all details are updated, the buyer should press *Save Event*.

❽	Post Event	_5.1.7 Previe w event PDF and post event for approval_	To post the event for approval, the buyer clicks on *Post Event*. The event is not visible for bidders in eTendering until it has been approved by a manager and the preview and/or start dates have passed. Tender notices must still be posted in UNDP website, UNGM, etc.
❾	Approver List		The buyer can view the eTendering event approvers for the BU, and copy the hyperlink to send to any approver as necessary. All people mentioned in the Approver List are automatically notified once the event is posted for approval.

2.2 Manage events during bidding process

Event Workbench

▼ Search Criteria

Event ID:	From Start Date: [ ] To Start Date: [ ]	Sort With: [▼]
Created By: [🔍]	From End Date: [ ] To End Date: [ ]	Sort Order: [▼]
Event Format: [▼]	Category: [ ]	☐ Only show Events I created
Event Type: [▼]	Item ID: [ ]	☐ Use my search defaults
Event Status: [▼]	Item Description: [ ] ①	Search Reset
Associated With Plan [ ] 🔍	Plan Name [ ] 🔍	Default Search Preferences

▶ Legend ②

Search Results   Find | View 100   First ◀ **1-25 of 829** ▶ Last

Event ID	Name	Format	Type	Unit	Status					
▷ 00...00679 ③	UAT Test Public Bi...	Buy	RFx	UNDP1	Open		④ ⊗	📖			🗞
▷ 00...00674	Test UNV	Buy	RFx	UNDP1	Pending Post Approval		⊗ ☑	📖		📄 ⑧	🗞
▷ 0000000669	Test email notific...	Buy	RFx	UNDP1	18/07/2016 07:04 AM EDT	⑤	☑	📖		📄	🗞
▷ WEBINARRFP	RFP Title	Buy	RFx	UNDP1	Pending Post Approval		☑	📖 ⑥		📄	
▷ 0000000663	2 UNDP User Guide ...	Buy	RFx	UNDP1	Open		⊗	📖			
▷ 0000000686	TEST 2: UAT PUBLIC...	Buy	RFx	UNDP1	Event Completed		⊗ ☑	📖 🔍		📄	🗞
▷ 0000000685	Notifications UNFP...	Buy	RFx	UNFPA	Awarded	·		📖 ⑦ 🔍			🗞
▷ 0000000684	CR003422 UNFPA UAT...	Buy	RFx	UNFPA	Event Completed		⊗	📖 🔍		📄	🗞
▷ 0000000682	UAT TEST: PUBLIC B...	Buy	RFx	UNDP1	Event Completed		⊗ ☑	📖 🔍		📄	🗞
▷ 0000000683	CR003422 UNFPA UAT...	Buy	RFx	UNFPA	Event Completed		⊗	📖 🔍		📄 ⑨	🗞
▷ 0000000681	testing language	Buy	RFx	UNFPA	Event Completed		⊗	📖 🔍		📄	🗞

	eTendering reference	Document reference	Detailed description
1	Search for event		Always search for the event by entering the Event ID or by ticking the box "Only show Events I created" and single out the event you are working on, to avoid accidentally making changes to other events.
2	Navigate through pages		To view more events in the list.
3	Event ID		Hyperlink to the main event page. If the event is not with status "Open", the buyer can only view the event details, and not make any changes, from this page.
4	Cancel Event	*8.4.2 Cancel an event*	To cancel an event, press this button. An event can never be reactivated after cancellation.
5	Approval Status	*8.3 VIEW APPROVAL STATUS*	Shows the approval status for the event, and the list of approvers for the concerned event.
6	View Event History	*8.2 VIEW EVENT HISTORY*	This is where the buyer can find and view previous event versions, and see who modified them latest and when.
7	Analyse Bids	*10 EVALUATION*	After the closing of the deadline, this button will appear which enables the buyer to view all bids, including prices and attachments. This is also where the award is indicated after evaluation.
8	Create New Version	*8.4 AMEND EVENT*	If the buyer wishes to make an amendment to an event, s/he clicks on this button to create a new event version. Until the new version is posted and approved by the manager, the bidders can only see the latest approved version in eTendering. Do not create a new version if previous version is pending approval. Do not create a new version for completed events.
9	View Bid History	*8.1 VIEW BIDDER PARTICIPATION*	From here, the basic information on bids received is found. Before the bidding deadline, the buyer can view level of participation, and after the bidding deadline the bid prices are also available. In case of a LOT event, the buyer will conduct the Public Bid Opening from this page.

2.3 Analyze Events

Analyze Events

Analyze Total   Analyze Line   Review Constraints   Award Summary   Award Details   Public Bid Opening Notification

Business Unit:	Event ID:	Round:	Version:	Event Name:
UNDP1	0000000672	1	2	UNDP eTendering User Guide 2016

Event Format:	Event Type:	Currency:	End Date:	Status:	Go To:
Buy	RFx	USD	21/06/2016 9:45AM EDT	Pend Award	---

▼ Bid Analysis and Display Options

Header Weighting:		Sort Bids By:	Total Event Score ▼	Sort Order:	Descending ▼	Analyze

Display Options: View Factor Responses ▼   ☐ Display Delta Responses   ☑ Display Disqualified Bids   ☑ Display Withdrawn Bidders

View Bid Actions: ☑ All Bid Actions   ☐ Award   ☐ Counter   ☐ Disallow   ☐ Reject   ☐ <No Action>

Analysis

Bidder Name	Test Elisabet 4	Elisabet Test 5	Test Elisabet 2016 1
Event Version:	1	1	1
Bid Number:	1	1	1
Total Bid Amount:	310.0000	320.0000	343.0000
Total Bid Cost	310.00	320.00	343.00
Total Event Score:	67.4000	58.1000	50.0000
Total Header Cost	0.00	0.00	0.00
Total Header Score:	0.0000	0.0000	0.0000

Bid Action	NA ▼	NA ▼	NA ▼
Reject Reason Code:			
Award by Percent:			

▼ Factors

	Weighting	UOM	Ideal			

ELIGIBILITY REQUIREMENTS

Do you confirm that you do not have a conflict of interest? Proposers, and any of their affiliates, shall be considered to have a conflict of interest with one or more parties in this solicitation process, if they: - Are or have been associated in the past, with a firm or any of its affiliates which have been engaged UNDP to provide services for the preparation of the design, specifications, Terms of Reference, cost analysis/estimation, and other documents to be used for the procurement of the goods and services in this selection process; Were involved in the preparation and/or design of the programme/project related to the services requested under this RFP; or Are found to be in conflict for any other reason, as may be established by, or at the discretion of, UNDP.	0.00000	Y	Y	Y	Y
Have you disclosed in your proposal your knowledge of the following : - That they are owners, part-owners, officers, directors, controlling shareholders, or they have key personnel who are family of UNDP staff involved in the procurement functions and/or the Government of the country or any Implementing Partner receiving services under this RFP; and - All other circumstances that could potentially lead to actual or perceived conflict of interest, collusion or unfair competition practices.	0.00000	Y	Y	Y	Y
Do you confirm that, to the best of the your knowledge, you are not included in the UN Sanctions List or the UN Ineligibility List, or in any and all of UNDP's list of suspended and removed vendors	0.00000	Y	Y	Y	Y

FINANCIAL REQUIREMENTS

Have you provide the Bid Submission Form, signed by an authorized representative of the entity submitting the bid and such submissions would be binding on the bidding entity	0.00000	Y	Y	Y	Y
Have you submitted a Bid/Proposal Security as per the format provided in the solicitation documents? A scanned copy of this document must be attached with your Bid in the system and the original must be sent by mail and shipment tracking number must be provided.	0.00000	Y	Y	Y	Y

Recalculate   Add/Edit Factors   <<   <   >   >>

Save   Return to Search   Notify   Refresh

	eTendering reference	Document reference	Detailed description
1	Display Disqualified Bids		To make sure all bids are viewed, even those potentially disqualified by the system, the buyer must tick this box and press "Save" at the bottom of the page.
2	Public Bid Opening Report	*9.1 AUTOMATED PUBLIC BID OPENING REPORT*	Press here to generate an automated Public Bid Opening Notification that will be sent to all bidders who have a posted bid in eTendering at the deadline.
3	Generate Analyze Export-file	*10.2 SHARE BIDS TO THE EVALUATION TEAM*	To generate an Excel overview of the submitted bids, including answers to Bid Factors and bid prices, the buyer can indicate *Go To: …Analyze Export*. The report can only be sent to Atlas users, but can be forwarded to members of the evaluation committee. The report is sent as an .xml-file that can be opened in Excel, and it may be used as a template for the evaluation report.
4	Analyze Total		Shows the total bid price and information.
5	Analyze Line	*10.2.2 Download and share attachments*	Shows the bid price and information per line item, and it is also the first place where bidders can upload attachments. Check all line items for attachments.
6	Header Comments		This is the second place where the bidders can upload attachments.
7	Answers to Bid Factors		At this place, the buyer can see all answers that bidders have provided to the bid factors. This is also the third and last place where the bidders can upload attachments. If the comments symbol is visible next to a Bid Factor response, it means that there is an attachment.
8	View more bids		The system only shows three bids at a time. Navigate through the pages to ensure that all bids are viewed.
9	Awarded Status	*11.1 IDENTIFY AWARDED AND NON-AWARDED BIDDERS*	Once the evaluation is finalized, the buyer must indicate the awarded status for all bidders in eTendering. The bidders can be *Awarded*, *NA* (Not Awarded, based on not competitive offer) or *Rejected* (based on non-compliance).
10	Award Summary	*11.2 SPECIFY AWARDED QUANTITIES*	Where the buyer indicates the awarded quantities.
11	Award Details	*11.3 CREATE PURCHASE ORDER*	From this page, the Vendors and Purchase Order can be created directly through eTendering. If the PO is created through this page, all details available in the event will be copied. If the event was sourced from a requisition, the COA will also be copied to the PO. The buyer can thereafter make any amendments as needed before notifying the manager for approval.

3 GETTING STARTED

This section describes the main activities that must be accomplished by a Country Office in preparation of the eTendering rollout.

3.1 PRE-REQUISITES FOR USING THE SYSTEM

To ensure that a Country Office holds the necessary capacity to use eTendering, the following actions are recommended before the first launch of a procurement process through eTendering:

- **Train system users**: All buyers must receive eTendering training. The Procurement Support Unit has developed several training materials and guides which can be used for this purpose. In addition, periodic or ad-hoc classroom trainings as well are webinars are organized, which future eTendering users are encouraged to attend.
- **Assign focal point/s for eTendering**: It is recommended that 1-3 people per Country Office are assigned as focal points for eTendering to serve as the first screening for potential queries by both UNDP users and bidders. These focal points will receive more in-depth training on the system.
- **Train the local bidder community**: Three approaches can be followed:
    - Send an open invitation to all suppliers and decide a maximum number of participants on a first-come-first-serve basis. Include additional suppliers in the next training event;
    - Focus on suppliers who do regular business with UNDP;
    - Conduct training as part of a specific procurement process, and invite suppliers who are interested in submitting a bid.
- **Identify system users and grant correct access**: Atlas buyers will automatically have access to eTendering while approvers need to be identified by management and provided with the correct approval access by the Argus focal point.
- **Translate the eTendering Instructions Manual for Bidders to local language**: For non-Anglophone countries it is recommended to translate the eTendering guide for Bidders to the local language and make it available for local bidders.

3.2 SYSTEM PROFILES

There are 4 main roles in Atlas eTendering:

- **Buyer/Event Creator**: This role can create and modify events for any BU. They can also review bids received in their own Business Unit. This is the default role in eTendering for all Atlas buyers.
- **Event Approver**: This role can approve events created by Buyers. It is given per BU by the respective Argus Focal Point (please refer to instructions below), based on decisions and approval made by the BU Senior Management. This role is usually given to the same people who have the rights to approve solicitation documents (ITB, RFQ, etc.) in the concerned BU.
- **Collaborator**: The eTendering collaborator is someone who has been invited by the buyer to review events (solicitation documents) or bids (evaluation) for a specific case. Any Atlas user can have this profile which is given only once. The buyers will then

invite the collaborators to specific events and the collaborator will have full view-only access to those specific events. ***Please note that this role is currently not activated***.

- **Super-User role**: This role is similar to *Event Creator* with the difference that they can also view bids received in other Business Units. This role is usually given to buyers located in Regional Bureaus and HQ who manage procurement processes on behalf of other BUs. This access is granted on ad-hoc bases by OIMT based on a request by the BU manager and reviewed by the Procurement Services Unit (PSU).

Note: It is possible for a person to hold the roles of both Event Creator and Event Approver in eTendering. However, the same person cannot approve an event s/he has created or modified.

3.2.1 Setting up event approvers in the system.

The eTendering Event Approver role is determined by the BU, and assigned by the Argus Focal Point. To assign the roles, go to the Atlas front page and click on *ARGUS*.
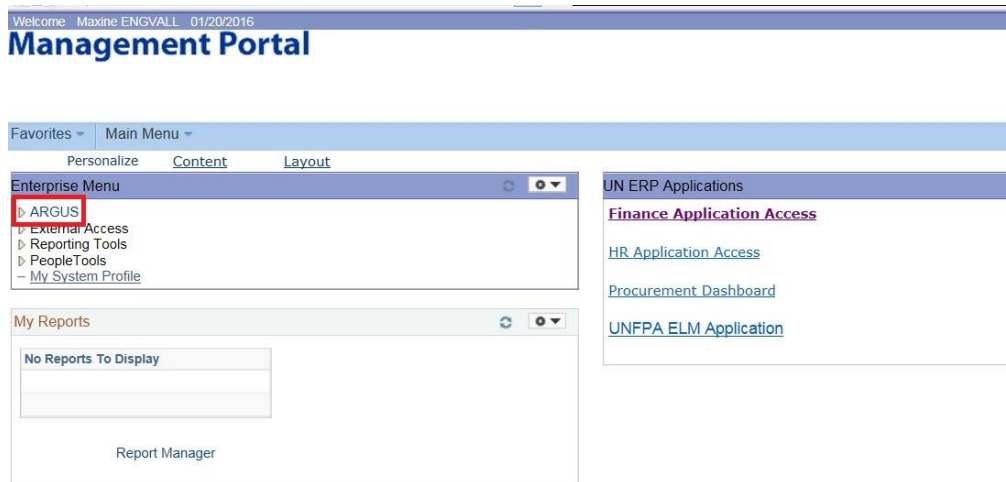
Thereafter, click on *Requestor* → *Modify User*.

Search for the user and click on the button indicated below.

Click on *Modify User Profile*.

Go to *Atlas Profile* and tick the box *eTendering Event Approver*.

The Event Approver role has now been added to the Atlas profile.

3.3   TRAINING RESOURCE MATERIALS

The Procurement Services Unit has developed several training and resource materials, such as user guides, FAQ documents, presentations, reports, webinars, templates for solicitation documents etc. All the training and resource materials can be found in:

- The PSU Intranet online library section, in the eTendering folder;
- The *Yammer group for eTendering*;
- *UNDP Procurement Notices*, contains only the resource materials for bidders

In addition, PSU has developed several templates directly in eTendering corresponding to most common procurement methods (RFQ, RFP, ITB, and IC) which will facilitate the use of the system when creating a bidding event.

Note: It is responsibility of the buyer to ensure that the chosen template contains the correct information before the event is created and launched.

4 PREPARING FOR AN EVENT

This section refers to the activities that are conducted outside eTendering in preparation for the creation of the bidding event in the system. Generally, these activities do not differ from normal preparation activities conducted when the procurement process is managed outside eTendering. The purpose is to have all necessary information available before creating the event, to avoid redundant work in the system.

4.1 DEVELOP PROCUREMENT STRATEGY

In this initial step of the procurement process, the buyer will decide on the procurement strategy to be followed. This is not a specific requirement for eTendering, however, some of the aspects that are decided at this phase will affect how the event is set up in the system. Therefore, it is useful to have those aspects clearly identified from the beginning. Below is a sample checklist of what you need to consider at this stage. Please note this list is not conclusive and other factors may need to be considered as well. The below checklist is focused only on aspects that affect how the event is setup in the system:

- Is it an RFP, ITB, RFQ, or IC?
- Is it open or limited competition?
- Will there be any LOTs?
- Is partial bidding allowed?
- What are the minimum requirements and other evaluation criteria?
- What will be the bid currency? Are other bid currencies allowed?
- What is the expected deadline for submission of bids?
- Who will be the focal point?

4.2 PREPARE SOLICITATION DOCUMENTS

Once the procurement method and setup are decided, the buyer must prepare the solicitation documents.

UNDP has developed standard solicitation document templates for RFQ, ITB, and RFP that must be used when the process is managed through eTendering. These templates are based on the standard templates, but some sections have been modified reflecting the fact that the process is managed online. For example, the solicitation documents for eTendering includes a section on how bids are submitted in the system and how bidders can edit their bids before deadline.

These templates are stored and regularly updated in PSU Intranet, eTendering section, and also shared through Yammer. The templates developed in the system also contain copies of such templates.

4.3 CHOOSE TEMPLATE IN eTendering

Several templates have been developed in eTendering to ease the workload of the buyer when creating tender events through the system. Currently, there are eight templates available for all UNDP Business Units. There are two templates, one extensive and one simplified, per procurement type: RFP, ITB, RFQ and IC.

It is highly recommended to use a template when creating the event, and thereafter adapt it to fit the particular details of the specific procurement event. Before the buyer starts creating the procurement case in eTendering, s/he should review the available templates and decide which to use. An inventory of the available templates can be found at PSU shared library on intranet.

The templates are just a tool to enable buyers to create event in a simple and faster manner. The setup and information included corresponds to the most common UNDP procurement processes. It is the responsibility of the users to ensure that the setup and information included is accurate and responds to the specific procurement process.

5   CREATE AN EVENT

The first step to initiate the procurement process through eTendering is to create an event. To do so, go to *Main Menu* → *eTendering* → *Create Events* → *Event Details*.
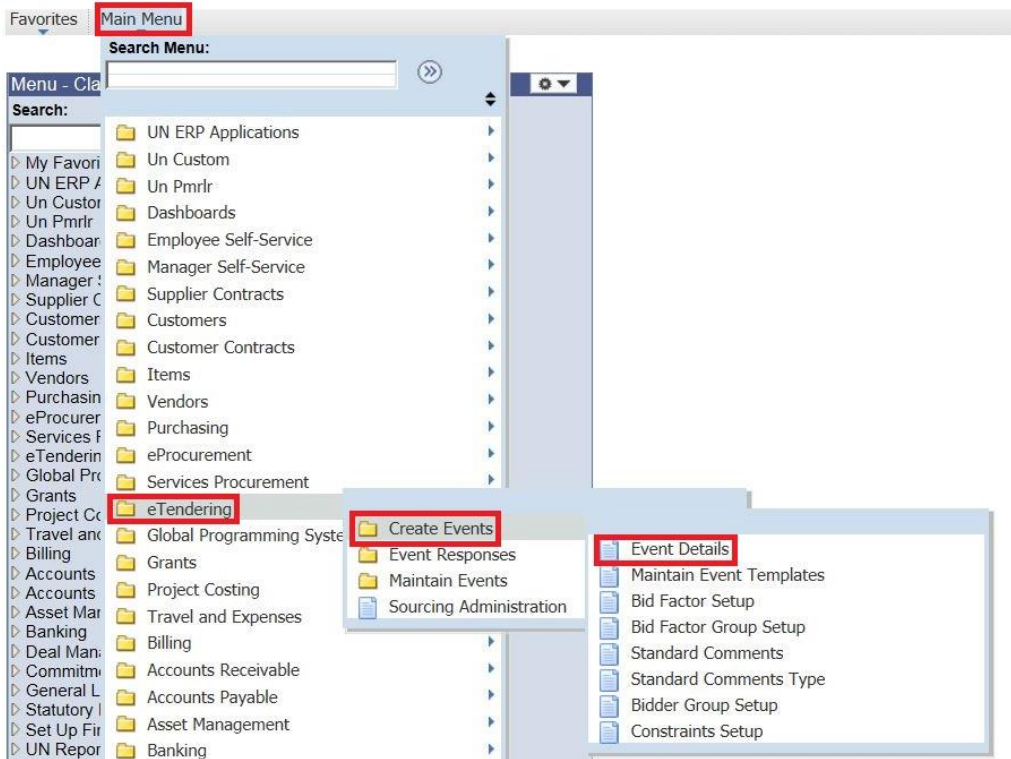
To add an event, enter the BU you are working in.

It is possible to add a customized event ID, or to leave it as the defaulted *NEXT*, which will automatically generate an event ID.

Note: The event ID must be unique.

Leave the Event Format as *Buy* and Event Type should be *RFx*.

Click on *Add*.

This will bring you to the main Event Page. There are several ways to proceed with the event creation, all described below.

5.1   CREATE EVENT FROM A TEMPLATE

5.1.1 Copy Template

Indicate *Copy From: Sourcing Template* and press on *Go*.

Search for the desired template by indicating:

- **Business Unit**: UNDP1. Please note that all corporate templates are found through UNDP1, regardless of the BU you use to create the event.
- **Copy Method**: Override
- **Event Type**: RFx

Click on the magnifying glass indicated below to find the available templates.

Click on the template you would like to use, then click *OK*.

Copy the line item from the template, and press *OK*.

Click on *Save Event Changes*, which will save the event in the system and generate the Event ID, if not preselected by the buyer.

Thereafter, click *Return to Event Overview*.

5.1.2 Amend Event Summary

The buyer can now adjust the following information in the *Event Summary*:

- **Event name**: The title of the bidding process as per the soliciation document.
- **Descr:** Event description, usually a copy of the front page of the soliciation document.
- **Preview Date**: The date on which the bidder will be able to see the event in eTendering and access all information. Normally it is the same as the *Start Date*, but can be different in case the buyer wants to post clarifications etc. before the bidders can bid on the event.
- **Start date**: The date on which the bidder is able to start posting their bids in eTendering.
- **End date**: The deadline for submission of bids.

Note: The text that is entered in the Description box is also the text that will be sent to any invited bidders. Therefore, please insert important information that you would like to share with bidders at the invitation stage.

When you have completed the fields, press *Save*.

5.1.3 Define Event Basics

The next step is to define the event basics, which are general settings that control how the bidders can submit their bids. To start defining the settings, click on *Event Setting and Options*.

The three options that are relevant are:

- **Bid Required on All Lines**: This will define whether partial bidding is allowed. If the box is ticked, bidders will not be able to submit their bid unless it contains price information for all line items. If it is not ticked, partial bidding is allowed.
- **Alternate Bids Allowed**: If it is allowed to submit alternate bids (multiple bids submitted by the same bidder), this box should be ticked.
- **Allow Edit of Posted Bids**: Allows that bidders edit their bids after submitting it, but prior to the deadline. It is recommended to always allow edits of posted bids.

When all selections are made, press *Save* and *Return to Event Overview*.

Go to *Payment Terms and Contact Info*.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

* Event Settings and Options   Payment Terms and Contact Info

Event Comments and Attachments

Event Header Bid Factors

On this page, the following should be taken into consideration:

- **Currency**: The default event currency is USD. If you would like to have another main event currency, press on the loop and choose the correct one.
- **Allow bids in other currencies**: If bids are allowed in multiple currencies, this box should be ticked.
- **Rate date**: If bids are allowed in multiple currencies, the rate date should be adjusted to the closing date of the event.
- **Contact details**: It is optional, but recommended, to provide an email contact for the solicitation process that will be visible for the bidders.
  - ○ **Contact Name**
  - ○ **Email ID**: This can be both a person's email, or a general procurement email address to which bidders can send requests for clarifications, etc.
  - ○ **Phone**

When all information is entered, press *Save Event Changes* and thereafter *Return to Event Overview*.

Modify an Event

Event Contact Details

Payment & Currency Information

*Currency:	USD	Exchange Rate	*Rate Type: UNORE
Pay Method:	EFT		Rate Date: 07/12/2012
Payment Terms:			☐ Allow bids in other currencies
Bill Addrs:	UNDP1		☐ Tax Exempt
Buyer:	roland.koxhaj		Exempt ID:

Event Contact

Contact Name:

Email ID:

Phone:

Save Event Changes   GoTo: ___ Go

< Return to Event Overview

🔍 Return to Search   🔄 Refresh   Add

Click on *Event Comments and Attachments.*

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

* Event Settings and Options   Payment Terms and Contact Info
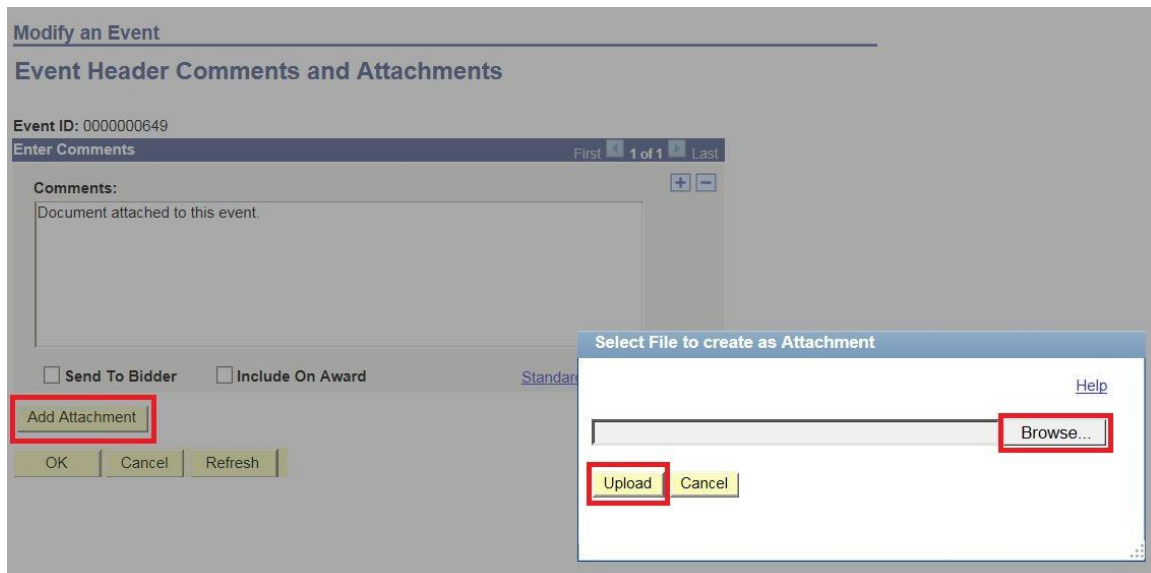
Event Comments and Attachments

Event Header Bid Factors

The template will have added a list of general attachments such as General Terms and Conditions, Bidder User Guide, etc. Please review all attachments and delete those that are not relevant for the solicitation process.

To add new attachments, click on *Add Attachment → Browse*. Select the attachment you would like to upload and thereafter press *Upload*.

Note: There are no restrictions in file format (PDF, Word, Excel, etc.) or size of the uploaded attachment. But attachments file name cannot be longer than 60 characters and should be of latin alphabet characters only.

Modify an Event

Event Header Comments and Attachments

Event ID: 0000000649

Enter Comments   First   1 of 1   Last

Comments:

Document attached to this event.

☐ Send To Bidder   ☐ Include On Award   Standard

Add Attachment

OK   Cancel   Refresh

Select File to create as Attachment   Help

Browse...

Upload   Cancel

Please make the following choises for each attachment that is uploaded:

- **Attachment Description**: Brief description of the file.
- **Display to Bidder**: If this box is ticked, the document can be viewed by the bidder. If not, it is only viewable by UNDP Atlas users.
- **Include on Award**: If this box is ticked, the attachment will be automatically attached to the Purchase Order if created from eTendering.
- **Include in Notifications**: If this box is ticked, the attachment will be included on any automatic notifications that are sent to bidders. When the event is created and bidders invited, all attachments which have this box ticked will be sent together with the email invitation.

- **Confidential**: If this box is ticked, the document will only be visible to UNDP Users and cannot be seen by bidders. If ticked, the other options will not be selectable.

In order to view the attachment, press the magnifying glass indicated below.

To remove an attachment, press the minus sign.

When all attachements are reviewed and added, press *OK*.

Note: Be aware of the size of the files which you select "Include in notifications". There may be email server restrictions to the size of attachments that might stop the email notifications sent by the system if the total size of files selected to include in notifications exceeds email server restrictions either at UNDP or the bidders side. Select only essential and light size files to include in notifications.

The next step is to review and add the bid factors of the event. Bid factors are questions that bidders will be asked when they submit their bid. The bid factors can be used in different ways, for example:

- To highlight important information, such as whether or not the bidder has attached all relevant bid documents.
- As an opportunity to get information that will facilitate the evaluation, such as a company description.
- To assist to determine the eligibility of a bidder, for example whether they are included in any vendor sanction lists or if they accept the UNDP General Conditions of Contract.

Note: The questions asked to the bidders should be seen as a way to facilitate the screening and evaluation of bidders. However, the bidders themselves populate the answers and it is the responsibility of the evaluation committee to determine whether the answers provided are correct or not.

For each Bid Factor, several options can be made. The most important ones are:

- **Bid Factor Response Required**: If this box is ticked, the bidders have to reply to the question to be able to submit their bid. If they do not reply, an error message will be displayed and they cannot submit the bid.
- **Ideal Response Required**: If this box is ticked, the bidder have to reply with the same answer as the one that the UNDP procurement focal point has indicated as ideal. If they don't reply the correct answer, an error message will be displayed and they cannot submit their bid.

To review the Bid Factors copied from the template and add new ones, click on *Event Header Bid Factors*.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

* Event Settings and Options   Payment Terms and Contact Info

Event Comments and Attachments

Event Header Bid Factors

Start by reviewing the Bid Factors copied from the template. Please consider the following:

- Is the question relevant? If not, consider removing it by pressing the minus sign marked below, or to amend the text.
- Is *Bid Factor Response Required* and *Ideal Response Required* ticked? Is it necessary, or should it be changed?
- Is the ideal response correct? If necessary, modify the question. Note: Please ensure consistency in the ideal responses, for example that all required answers are *Yes*.

To remove any bid factors, press the minus sign as indicated below.

To add new Bid Factors, press on the plus sign [+]. The new Bid Factor will be added below the one you added from.

To search for pre-populated Bid Factors, press the magnifying glass. If the existing Bid Factors are used, please review them as mentioned above to make sure all details are correct and corresponding to the specific bidding process.

If none of the existing Bid Factors meet the criterias that are set up, it is possible to create a new one by entering the information manually.

There are six types of Bid Factors available:

- **Yes/No**: This is the most common type of Bid Factor where the bidder can select Yes or No as response. Note: It is highly recommended to use this type as it is easy for the bidder to respond, as well as for the evaluation committee to compare the answers.
- **Text**: The bidder will have a comments box to enter their response.
- **Date**: The bidder will enter a date, for instance: date of availability, or delivery date.
- **Monetary**: The bidder will enter a monetary value as response.
- **List**: The buyer will set up a list of options that the bidder can select as their response.
- **Numeric**: The bidders will enter a number as response.
- **Separator**: This is not a question, but will appear as a Header. It can be used to organize the questions, for example into sections of technical, general, and eligibility requirements.

Note: Only tick *Ideal Response Required* for the Yes/No type of Bid Factors. Otherwise, the bidder will not be able to submit an offer with anything else than the best response indicated by the buyer.

When all Bid Factors are added, press *Save* and *Return to Event Overview*.

5.1.4   Complete price schedule & copy from requisition

The next step is to set up the price schedule for the tender, which can either be sourced from a requisition that will later be copied to the PO automatically, or to insert the price schedule manually.

To set up the price schedule, click on *Line Items*.

Delete the line item that was copied from the template by clicking on the minus sign, and then *OK*.

To add a line manually, insert the Item ID and quantity.

Note: The start price is used as the requisition price, or the estimated budget price. It is **<u>not visible to bidders</u>** and will not impact the price bidders can bid or be awarded.

If you choose to copy a line from a requisition and later create the Purchase Order through eTendering, the requisition schedule will be automatically populated in the PO.

To copy line items from a requsition, choose *Copy From: Requisition* and press *Go*.

Find the requisition by entering your Business Unit, choosing *Copy Method: Append* and *Select Lines: Req Lines*. You may also enter the Req ID directly in the search. Press *OK*.

Select the lines to copy and press *OK*.

Please note that it is possible to source only some of the requisition lines, as well as lines from different requisitions. Once a line has been sourced into an event, it is not possible to source it to another event unless the line is deleted from the event it was already sourced to.

When adding line items, please consider the following:

- This is the price schedule: to avoid any mathematical errors or discrepancies, do not request bidders to provide same pricing and information in a separate document, unless it is an RFP or LOT-based event.
- Ensure that the items are listed in the same order as in the Solicitation Documents.
- Do not delete or edit the Item ID for lines that have been copied from requisition, as it will cause the requisition line to appear as available (not sourced).

The shipping information and individual settings for each Line Item can be changed by going to *Advanced Definition*.

To add line comments or attachments, press on the comments box marked below.

Note: Do not use the line comments for detailed item specifications as it will be cumbersome for bidders. Instead, it is recommended to consolidate the requirements and specifications for all items in one document and provide it as an attachment to the solicitation document.

Note: Always view the line item comments to ensure that any defaulted information provided is accurate, particularly if you copy from a requisition. If the box *Show to Vendor* is ticked, the comments will be automatically visible to the bidders once the event is published.

To add information on the Due Date, Incoterms, Ship To or Freight Terms for the individual lines, click on *Details*. If the details are the same for all line items, enter them through *Line Items Default* at the main event page.

It is also possible to set specific rules for the quantity the bidder can bid for the item. The options available under *Bid Quantity Rule* are:

- **Requested Quantity Required**: This is the most common scenario, and it is also the default. It means that the bidder cannot change the quantity defined by UNDP and has to bid on exact quantity. Bidder can only provide a unit price for the complete requested quantity.
- **Allow Extra Quantity to be Bid**: Bidders can modify the quantity and bid the same or more than the quantity that has been required by UNDP.
- **Bid Up to Maximum Quantity**: Bidders can modify the quantity and bid the same or less than the quantity that has been required by UNDP.
- **Quantity Not Applicable**: There is no quantity field, and the bidder enters a lump sum price, not a unit price.

When all selections are completed, click on *OK*.

5.1.5   Define Bidder Invitations

For the next step, click on *Bidder Invitations*.

If the solicitation has open competition, the box named *Public Event* should be ticked. This means that all bidders who are registered in eTendering will be able to view and bid on the event.

It is also possible to alert bidders when a tender is posted on eTendering by entering their email addresses. Click on ▤ to add bidders email addresses and names. Maximum 999 bidders can be added.

It is only possible to use this function if the event is public. If it is limited competition, bidders must already be registered in eTendering to be directly invited to the tender.

When you have added all bidders you would like to alert, press *OK*.

To search for bidders that are already registered in eTendering, for instance in the case of limited competition, click on *Search for Bidders*.

Select *Bidder Type: Bidder,* then enter the company name and press the magnifying glass. Select the bidder you would like to invite to the event and press *Search*.

Tick the box named *Invite* for the appropriate vendor and press *OK*.

The invited bidders will be added to the list as below.

When all relevant bidders are selected as invited, press *Save Event Changes* and *Return to Event Overview*.

5.1.6 Invite Collaborators

This feature is currently unavailable.

5.1.7 Preview event PDF and post event for approval

All steps of the event have now been completed. To preview the system generated PDF-file that summarizes the event and will be sent to invited bidders, press *Preview PDF*. This will generate an email to the event creator with two files, one PDF, and another XML file that can be opened and modified in Excel.
To post the event for approval, press *Post*.

Note: Once an event is posted for approval, the buyer cannot make amendments to the event version unless it has been approved or rejected by the approving manager.

Note: The event is not visible for bidders until it has been approved by the manager.

To see the approvers within the Business Unit, click on *Approver List*. All approvers listed here will receive an automated email from eTendering when the event is posted for approval. However, if the buyer wishes to notify any of the approvers themselves, it is possible to copy the URL available when clicking *Approver List* and send it in an email to the approver.

5.2   CREATE AN EVENT FROM ANOTHER EVENT

If you want to create an event that is similar to one you have created in the past, you may copy from a previous event.

To do this, follow the same steps as when copying from template, but choose *Copy From: Sourcing Event*.

Make sure that the following choices are made:
- Business Unit
- Copy Method: *Override*
- Event Type: *RFx*
- <u>*Copy Event Factors/Constraints* is ticked</u>

Thereafter, indicate the event ID you would like to copy from and press *OK*.

All information from the previous event will be copied, except the following:
- Preview Date and Start Date
- The text in the description box
- Attachments

Review and edit all information as necessary in the same way as when copying from Template.

5.3   CREATE AN EVENT FROM SCRATCH

It is possible to create an event from scratch, meaning that the all information needs to be populated by the buyer and will not be copied from a template or previous event.

To do this, go through all the steps in the event and fill out the information.

5.4   CREATE AN RFP EVENT

In eTendering, RFPs are treated in the same way as other procurement methods. The difference is only made in how the financial information is provided by the bidders. For RFP's, the bidders must submit their proposal as a password protected PDF uploaded in the system.

To ensure a safe submission of financial offers for RFP events, start by preparing the bidding document and all relevant sections. Note: Use the template modified for use with eTendering.

Thereafter, the buyer should create the bidding event in eTendering. In principle, this is done in the same way as when creating an RFQ/ITB/IC event with some additional steps mentioned below. It is highly recommended to use the RFP template in eTendering system as it has several bid factors that are aligned with the use of the system for RFP cases.

In particular, it is important to emphasize to bidders that they must submit their financial proposal only as a password protected document. If any of the RFP templates have been used when creating the eTendering event, the following Bid Factor will be included:

Note: Do not delete this Bid Factor as it provides the below important instructions to the bidders on the submission of financial proposal.

Have you submitted the financial proposal as per the form and instructions provided in the solicitation documents.

Financial Proposal must be submitted as a separate file encrypted with a password. None of the financial proposal data is disclosed in other documents of the submission. UNDP shall request password for opening the Financial Proposal only from the Proposers who pass the Technical Evaluation as per the criteria established and disclosed in the solicitation document. The Proposer shall assume the responsibility for not encrypting the financial proposal.

DO NOT DISCLOSE YOUR PRICE IN THE LINE ITEMS. YOU MUST PUT PRICE AS 1 IN THE SYSTEM AND PROVIDE THE FINANCIAL PROPOSAL AS ENCRYPTED FILE AS EXPLAINED ABOVE.

The other distinctive difference between the templates for ITB/RFQ/IC and RFP is in the line item comments. To view the line item comments, go to *Line Items* and then *Advanced Definition* and click on the comments bubble.

The following comment will be visible in the line item that was copied from the RFP templates:

This comment must be entered manually by the buyer to all line items that are added to the event.

PLEASE DO NOT PUT THE PRICE OF YOUR PROPOSAL IN THIS LINE. INSTEAD PUT 1 USD.

DETAILED FINANCIAL PROPOSAL MUST BE PROVIDED SEPARATELY AS AN PASSWORD PROTECTED FILE AS INSTRUCTED.

The process to set up the RFP event is not different to a RFQ/ITB/IC event in other aspects.

At the evaluation stage, the procurement office will formally request the bidders who passed the technical evaluation to submit the password for their financial proposal. The response from the bidders, including the password, shall be uploaded in eTendering and marked as a confidential document.

In essence, the financial proposal document is managed in the same way as when the proposals are submitted via email, where the financial proposal is sent as a password protected attachment. Different Country Offices may have slightly different practices on how the passwords are retrieved and how the financial proposals are opened. eTendering does not intend to change those practices.

5.4   CREATE AN EVENT WITH LOTS

Bidding processes that are built on LOT's of items are set up in the same way as other events in eTendering. The only difference is how the line items are added, where each line item will correspond to one LOT. The bidders should be instructed to add the total LOT price in the price schedule in eTendering and upload the unit price schedule as an attachment to their bid.

To create the LOT event in eTendering, start by preparing a detailed price schedule where all items and quantities for each LOT are listed.

When setting up the event in eTendering, follow the instructions in section *5   CREATE AN EVENT*.

Add the bid factor named *PRICESCHEDULE* which instructs bidders to upload their detailed price schedule per LOT separately.

Add one Line Item per LOT with quantity as 1 and choose the item ID that corresponds to the LOT. Thereafter, enter the start price and press *Save*.

Click on *Advanced Definition*.

Click on the comments bubble.

Add the LOT description for each LOT, tick the box *Send To Bidder* and press *OK*.

Upload the price schedule as an attachment as per the instructions in section *5.1.3 Define Event Basics*.

Note: It is important to clarify to bidders in the Solicitation Document which price schedule shall prevail, should there be any discrepancy between the total prices mentioned in the price schedule in eTendering compared to the detailed price schedule uploaded by the bidders.

6   PUBLISH PROCUREMENT NOTICE

When the event has been approved by the manager and the Preview and/or Start Date has passed, registered bidders can view and access all information and attachments through eTendering for the particular tender process.

Still, a Procurement Notice must be published as per the POPP, in the same way as it is done if the tender is not handled through eTendering.

The text of the procurement notice is the same as usual, but the Bidders User Guide and FAQ should be attached to the notice, and the following paragraph should be added to introduce eTendering to the bidders:

> Please note that this procurement process is being conducted through online tendering system of UNDP. Bidders who wish to submit an offer must be registered in the system. If already registered, sign in using your username and password. Use "Forgotten password" link if you do not remember your password. Do not create a new profile. If you have never registered in the system before, you can register by visiting the link below and follow the instructions provided in the user guide for bidders in the document attached:
>
> https://etendering.partneragencies.org
>
> **Username: event.guest**
> **Password: why2change**
>
> *Please note:*
> 1. *It is strongly recommended to create your username with two parts, your first name and last name separated by ".", similar to the one shown above.*
> 2. *Once registered you will receive a valid password to the registered email address which you can use for signing in and changing your password. You can participate in the bid event only if you have registered in the system.*

If attachments are added to the event after it is published, for example to upload pre-bid meeting minutes, or any other amendments, it is not necessary to amend the original Procurement Notices. However, the **procurement notices must be amended if the deadline is extended.**

The following categories of bidders will receive automatic notifications from eTendering in case of any changes to the event:

- Bidders who have been directly invited to the event by UNDP.
- Bidders who have accepted the invitation for the particular event (please see Bidders User Guide for more information). Note: Because of this, UNDP Buyers should encourage bidders to accept the invitation to all events in which they are interested.

- Bidders who have submitted a bid on the particular event.

7   APPROVE EVENTS

Once an event is posted by the buyer, the event approvers will receive an email requiring their approval. Click on the email hyperlink to go the approval page. Alternatively, the approval page can be accessed by navigating to *Main Menu* → *Worklist* → *Worklist* and select *Worklist Filters: Approval Routing*. From *Worklist*, click on the relevant event.

Approving managers can choose to:

- **Approve**: this action will publish the event, taking into consideration the Preview and Start Date.
- **Deny**: this action will send the event back to the Event Creator for making necessary changes. The approver can include comments in the box named *Approval Comments*.

When the event is approved, eTendering will send an automatic notification to the buyer who created the event.

Note: A person can have the eTendering profiles to be both Event Creator and Event Approver, but the same person can never approve an event s/he created.

8   MANAGING AN EVENT DURING SOLICITATION PROCESS

This section will describe the actions that the buyer can take during an ongoing bidding period, from the posting of the event until the deadline for submission of bids has passed and the evaluation can commence.

To take any of the actions mentioned in this section, navigate to *Main Menu* → *eTendering* → *Maintain Events* → *Event Workbench*.
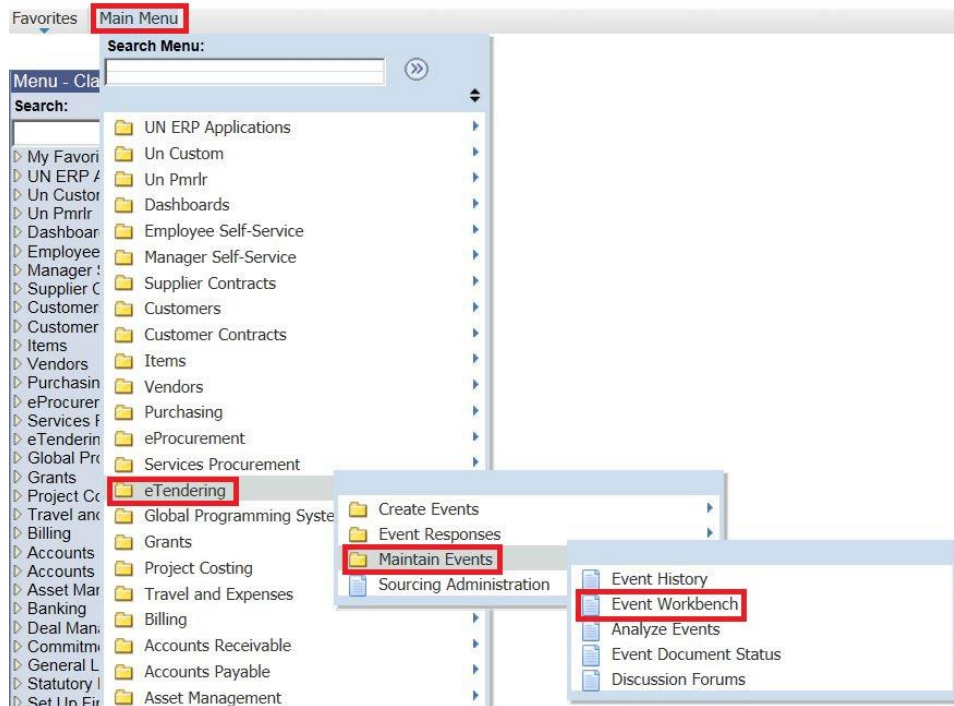
All eTendering events for all Business Units are listed in the Event Workbench. It is recommended to filter the Workbench and search for Event ID, or tick the box named *Only show Events I created* to find the event you are looking for.

8.1   VIEW BIDDER PARTICIPATION

To view bidder participation for an event will enable the buyer to see how many bidders that are interested to participate in an event, and how many have already submitted a bid. This can help the buyer to determine whether the deadline for submission of bids need to be extended, in case of low participation.

Note: It is possible for the UNDP Buyer to see which bidders have submitted a bid, but it is not possible for anyone except the concerned bidder to view any of the information in the submitted bid until after the deadline of the event.

To monitor the participation in an event, click on the button named *View Bid History*.

The following selections are possible:

- **Total Event Invitations**: shows if bidders who were invited directly by UNDP through eTendering have accepted or declined the event invitation, and if they have submitted a bid.
- **Accepted Invitation**: shows bidder who have clicked on *Accepted Invitation* and whether they have posted a bid or not.
- **Declined invitation**: shows all bidders who were invited to the event directly by UNDP but who have declined.
- **No response**: shows bidders who were invited directly by UNDP but have not yet responded to the invitation.

In essence, the *Accepted Invitation* link will show all bidders participating in the event.

Note: It is highly recommended that the buyer checks that there is sufficient participation during the solicitation period to ensure a timely deadline extension, if necessary.

8.2   VIEW EVENT HISTORY

To view previous versions and who has made modifications to the event, click on *View Event History*.

This page will display all versions of an event. To view an event version, press on the magnifying glass.

Note: It is only the version that has *Event Status: Posted* that is visible to bidders when they enter eTendering.

8.3 VIEW APPROVAL STATUS

Click on *Approval Status* to view which managers can approve the event, who has approved it and any comments they have inserted.

8.4 AMEND EVENT

To make any changes to an ongoing event, click on the button named *Create New Version*. This will prompt the system to create a new version of the last event version that has been posted, in which the buyer can make any amendments as necessary and thereafter post it again.

Note: Bidders will continue to see the latest approved version until the new version has been posted and approved by the manager.

Clicking on *Create New Version* will lead you directly to the new event version page. Make any necessary changes in the same way as when creating the event.

The event page mentions which version you are working on.

When making any changes, always mention them in the description box as the text there will be included in the automated email to any bidders who have been invited by UNDP, accepted the event invitation, or already submitted a bid to the previous event version.

All bidders who fall under any of the categories to receive automatic notifications will be visible in the *Bidder Invitation* section of the new event version.

Note: The system will automatically include all bids received for the previous version in the new version.

Please note some important considerations when making amendments to an event:

- Never create a new version if the deadline of the previous version has passed. In this scenario, you must create a new event.
- Do not create a new version if the previous version is pending approval. If you want to make changes to an event that has been posted and is pending approval, ask the manager to deny the new version and thereafter make the changes before posting it for approval again.

- Changes to bid factors or line items should be avoided to the greatest extent possible. If needed, follow the special instructions in section *14 EDIT LINE ITEMS AND BID FACTORS*.

8.4.1 Managing attachments when a new event version is created

When creating a new version of an event, please also consider the settings for each attachment. New attachments can be handled the same way as when the event is created.

All attachments that are ticked *Include in Notifications* will be included in the automatic notifications to bidders when the amended event is posted.

It is recommended to untick *Include in Notifications* for all attachments that were attached in the old version and only tick the box for any new attachments, as it will help the bidder identify which documents are new.

Note: Remember that *Display to Bidder* must be ticked for all attachments that bidders should be able to access in eTendering.

8.4.2 Cancel an event

To cancel an event, click on the button named *Cancel Event*.

Confirm that the event should be cancelled.

If a new event version has been created by mistake, but not yet approved, take note of the event version mentioned, as cancelling only the non-approved version will not impact the previous version that will still be posted in the system.

Once an event has been cancelled, it cannot be re-activated again. If you cancel a posted event, eTendering will send an automatic notification to the subscribed bidders that the event has been cancelled.

9   PUBLIC BID OPENING

The main purpose of the Bid Opening is to ensure the integrity of the process and that bids are submitted in time and properly recorded. The eTendering system achieves this purpose it a) does not accept any bids after the deadline; b) encrypts the bids so that the bid information cannot be viewed by anyone before bid closure deadline; and, c) digitally stamps all bids received and does not allow anyone to change any of the information in the received bids after the deadline.

> *Extract from POPP on opening of offers:*
>
> *In ITB and RFP (i.e., exceeding USD 100,000), the opening of the offers must be done in the presence of an ad-hoc committee formed by UNDP of at least two (2) members.*
>
> *The Offeror's names, modifications, withdrawals, the condition of the envelope labels/seals, the number of folders/files and all other such other details as UNDP may consider appropriate, will be announced at the opening. No offer may rejected at the stage of opening the offers, except for those that were late in submission, for which the offer shall be returned unopened to the Offeror.*
>
> *A brief documentation of the opening of the ITB or RFP must be kept on record, indicating the offers that were opened, their respective offerors, the individuals present at the time of the opening, and all other relevant information.*

eTendering generates an automatic bid opening report, and it is only for LOT-based procurement cases that additional actions are needed to ensure full compliance with POPP guidelines.

Note: If specially required, it is possible to conduct a Public Bid Opening even when the bids are received through eTendering, though the automated notification generated by the system will decrease the workload of the procurement personnel while at the same time comply with POPP.

9.1   AUTOMATED PUBLIC BID OPENING REPORT

Through eTendering, the procurement staff can send an automated Bid Opening Report to all bidders who have submitted a bid for the particular event.

To generate the Public Bid Opening notification, go to *Main Menu* → *eTendering* → *Maintain Events* → *Event Workbench*. Find the concerned event, and click on *Analyze Bids*. From this page, click on *Public Bid Opening Notification*.

Click on *Yes*.

eTendering will now send out the Public Bid Opening notification to all bidders who have a posted bid in the system at the time of bidding deadline. The message contains information on the name, total bid price and bid currency for all bids. The bidders will be bcc'd and will not see the other bidders' email addresses. A copy of the email will be sent to the buyer who generates the public bid opening report. Please see an example of the Public Bid Opening notification below:

The report can be generated only one time. Once generated, the "Public Bid Opening Notification" button is greyed and cannot be used anymore.

9.2   PUBLIC BID OPENING FOR LOT EVENTS

As the automated Public Bid Opening report only includes the total bid price, it is not sufficient for LOT based events where the price for each LOT should be displayed for the bidders. In this case, a Public Bid Opening event with the participation of bidders is necessary.

eTendering will decrease the workload of the procurement personnel as the bidder names and bid prices are already populated in eTendering. The procurement personnel will log into eTendering and retrieve the relevant information, and then connect the computer to a screen to show the bidders the Bid Opening Information directly from eTendering.

Note: The responsible procurement officer must ensure that the system is functioning properly before initiating a Public Bid Opening Event with bidders, to avoid any potential inconvenience.

To show the information for public bid opening, go to *Main Menu* → *eTendering* → *Maintain Events* → *Event Workbench* and search for the event. Click on the *View Bid History* button.

Select *Report Type: Bidder/Bid* and *Status/Ranking: Price*. You may also choose to sort the bids by the company names.

For LOT events, we use the line item as a LOT, therefore, the bid price indicated in the line item fields by the bidders is the bid price for the lot. Therefore, to show the LOT bid prices, we must show details by clicking on *Expand All*. This will display all LOT prices.

NOTE: For non-LOT events, unit prices should not be displayed. However, in the case of LOT, one line item represents one LOT and therefore the unit prices should be displayed.

Event Bid History

Event ID	Event Name	Round	Version	Event Type	End Date	Status
UNDP1-0000000672	UNDP eTendering User Guide 2016	1	2	RFx	21/06/16 9:45AM EDT	Posted

Report Type

○ Event Invitation ○ Best Bids ● Bidder/Bid ○ List By Line

Status/Ranking

○ Score ○ Rank ○ Bid Status ● Price

[Refresh]

Sort By: [____ ▼] ☐ Descending

Expand All Collapse All

Find   First ◄ 1-4 of 4 ► Last

	Bidder Name	Bid#	Bidder ID	Date Time Posted		
▽	Test Elisabet 4	1	0000011549	21/06/2016 9:07:36AM	310.00 USD	✖

Line	Item ID	Item Description	Price
1	000000000000000019	Marker whiteboard Snowman Any Color	150.00 USD
2	000000000000000014	Signpen Pilot BX-V5 any Color	160.00 USD

	Bidder Name	Bid#	Bidder ID	Date Time Posted		
▽	Elisabet Test 5	1	0000011552	21/06/2016 9:12:26AM	320.00 USD	✖

Line	Item ID	Item Description	Price
1	000000000000000019	Marker whiteboard Snowman Any Color	155.00 USD
2	000000000000000014	Signpen Pilot BX-V5 any Color	165.00 USD

	Bidder Name	Bid#	Bidder ID	Date Time Posted		
▽	Test Elisabet 2016 1	1	0000011560	21/06/2016 9:29:19AM	343.00 USD	✖

Line	Item ID	Item Description	Price
1	000000000000000019	Marker whiteboard Snowman Any Color	200.00 USD
2	000000000000000014	Signpen Pilot BX-V5 any Color	143.00 USD

	Bidder Name	Bid#	Bidder ID	Date Time Posted		
▽	Test Elisabet 2016 2	1	0000011561	21/06/2016 9:37:29AM	319.00 USD	✖

Line	Item ID	Item Description	Price
1	000000000000000019	Marker whiteboard Snowman Any Color	132.00 USD
2	000000000000000014	Signpen Pilot BX-V5 any Color	187.00 USD

Return to Event Workbench

Note: When conducting a Public Bid Opening for LOT's, always use Google Chrome as the web browser. Other browsers will mark the prices of the bids in red or green depending on the automatic scoring done by eTendering, which can potentially confuse bidders as it implies that the winner has already been selected while the system has not taken technical compliance of the bids into account.

For internal purposes, to have a printed record of the bids received (e.g. to submit to CAP/ACP), make a PDF print of this page

Atlas Finance

Welcome elisabet.lundqvist, Your Atlas Finance Last Login Datetime : 21.Jun.2016 14:11:58 GMT

Home   Worklist   Add to Favorites   Sign out

Favorites   Main Menu   eTendering   Maintain Events   Event Workbench

Event Bid History

Event ID	Event Name	Round	Version	Event Type	End Date	Status
UNDP1-0000000672	UNDP eTendering User Guide 2016	1	2	RFx	21/06/16 9:45AM EDT	Posted

Report Type	Status/Ranking	Refresh
○ Event Invitation ○ Best Bids ● Bidder/Bid ○ List By Line	○ Score ○ Rank ○ Bid Status ● Price	

Sort By: [▼] ☐ Descending

Expand All   Collapse All

First   First 1-4 of 4 Last

Bidder Name	Bid#	Bidder ID	Date Time Posted		
▽ Test Elisabet 4	1	0000011549	21/06/2016 9:07:36AM	310.00 USD	✕

Line	Item ID	Item Description	Price
1	000000000000000019	Marker whiteboard Snowman Any Color	155.00 USD
2	000000000000000014	Signpen Pilot BX-V5 any Color	155.00 USD

▽ Elisabet Test 5	1	0000011552	21/06/2016 9:12:26AM	320.00 USD	✕

Line	Item ID	Item Description	Price
1	000000000000000019	Marker whiteboard Snowman Any Color	155.00 USD
2	000000000000000014	Signpen Pilot BX-V5 any Color	155.00 USD

▽ Test Elisabet 2016 1	1	0000011560	21/06/2016 9:29:19AM	343.00 USD	✕

Line	Item ID	Item Description	Price
1	000000000000000019	Marker whiteboard Snowman Any Color	200.00 USD
2	000000000000000014	Signpen Pilot BX-V5 any Color	143.00 USD

▽ Test Elisabet 2016 2	1	0000011561	21/06/2016 9:37:29AM	319.00 USD	✕

Line	Item ID	Item Description	Price
1	000000000000000019	Marker whiteboard Snowman Any Color	152.00 USD
2	000000000000000014	Signpen Pilot BX-V5 any Color	167.00 USD

Return to Event Workbench

10   EVALUATION

This section describes the process from the closure of the bidding deadline to the issuing of the contract.

10.2   SHARE BIDS TO THE EVALUATION TEAM

Only buyers have access to bids received within their respective BU. However, the evaluation team may be also composed of individuals that do not have an Atlas buyer profile and therefore do not have direct access to the bids received in the system. It is the responsibility of the procurement officer managing the case to provide the Evaluation Team members with all the information submitted by the bidders.

After the deadline, a new button will appear next to the event in the *Event Workbench*. Click on *Analyze Bids* to access all the submitted bids.

The bids will appear as below.

Tick the box *Display Disqualified Bids* and press *Analyse* to ensure that any bids that may have been automatically disqualified by the system are also displayed.

Note: eTendering disqualifies bids based on the settings the buyer have set up in an event. If the settings are amended when a new event version is created and the submitted bids are not compliant to the new settings, eTendering will automatically disqualify them. It is up to the buyer to ensure whether or not the bids should be disqualified.

The bid responses can be categorized in 3 groups:
- Responses to the questions (Bid Factors) setup in the system
- Price information
- Supporting documentation (attachments) uploaded by bidders directly in the system

Only three bids are displayed at a time. To see the other bids, go to the bottom of the page and press the arrows as indicated below.

Is it possible to download the Analyse Bids-page as a PDF by right clicking on the page, choosing *Print* and *Save as PDF*. If the buyer uses this option, s/he must ensure that they save a PDF of all bidders after scrolling to the right.

10.2.1 Share Bid Analysis export

To share the information of the bids, including the responses to bid factors and price information, the buyer can download the Bid Analysis Export file, which is managed in Excel. Note: This is recommended as it can be used by the evaluation committee as a template that can be modified for the evaluation report.

To get the report, select *Go to: Analyze Export*.

Add additional evaluation team members as file recipient names by clicking on the + and enter their names and email addresses.

Note: Only Atlas users can be added to the list of file recipients.

When all recipients are added, click on *Create Analysis Export* which will prompt the system to generate an .xml file that will be sent via email to all recipients.

To open the attachment, start by saving it to your computer.

Then open *Excel*. Click on *File →Open → Browse* and find the file and open it.

Note: It is not possible to open the .xml file just by double clicking on it.

The bidders' responses are listed in the columns next to each other.

Please take note of the different tabs that contain all information entered by the bidders, except for attachments.

10.2.2 Download and share attachments

There are three places through which the bidders can upload attachments:

- Through the *General Comments and Attachments*
- As Bid Factor responses
- At each of the Line Item level

Note: The buyer is responsible to check all places and ensure that all attachments are downloaded.

To download the attachments from the *General Comments and Attachments*, click on the comments bubble below the bidder name.

Download each attachment by clicking on the *View Attached* File-button marked in red below.

One of the attachments with the description as *Bid Details* and file name same as the tile of the event is automatically generated by eTendering and contains a summary of the specific bid. This attachment also contains a full list of all attachments uploaded by the bidder and can be used by the buyer as reference to double check that they have downloaded all attachments.

To download attachments that have been uploaded as Bid Factor responses, please click on the below indicated symbol. If this symbol is not visible next to any of the Bid Factors, the bidder has not uploaded any attachment as Bid Factor response.

To download attachments through the Line Item responses, click on *Analyze Line*.

Go through all lines by selecting them in the dropdown list, and click on the comments bubble to view and download any attachments.

Note: The buyer must check each of the line items to see if there are any attachments.

Note: Is it recommended to advise bidders to upload all bid attachments in one zip-file, as it will decrease the workload of the buyer to download and share them with the evaluation team.

10.2.3 Opening and managing of financial proposals for RFPs

With the current setup of the system, bidders are instructed to upload their financial proposal as a password protected document. In that sense, the process of retrieving, managing, and storing the passwords does not have to change as compared to how the Country Office is doing now that proposals are received via email.

eTendering provides an option for the Country Offices to upload the passwords to financial proposals in the system at the stage of evaluation. For reference and filing purposes, this is highly recommended. Please contact PSU for more guidance if you choose to follow this option.

10.3   EVALUATION PROCESS

After the bid opening and distribution of all bid documentation and information to the evaluation team, the process of evaluating offers is conducted outside eTendering. Evaluation team will assess all offers and finalize the evaluation report in the same way as it is done when bids are received via mail or email.

The process of review and approval of the procurement process through CAP, RACP or ACP is, like the evaluation, managed outside the system. The procurement personnel must ensure that the relevant reviews and approvals have been obtained before proceeding to award a contract through eTendering.

Note: Currently, the ACP website is not linked to eTendering.

11 AWARD TO CONTRACT & REFLECT EVALUATION IN THE SYSTEM

Once the evaluation has been completed and all required approvals are obtained, the procurement officer managing the case must reflect the final outcome of the process in the eTendering system.

11.1 IDENTIFY AWARDED AND NON-AWARDED BIDDERS

First of all, the procurement personnel should categorize all bidders into one of the following categories:

- **Awarded**: Bid that will be awarded a contract
- **Rejected**: Bid that is not responsive or compliant, and therefore rejected
- **NA (Not Awarded):** Bid that is compliant but not awarded due to uncompetitive pricing

Note: Two additional options are available in eTendering, *Disallowed* and *Counter*. They are for different purposes and should not be used.

To reflect the outcome of the evaluation process in eTendering, navigate to *Main Menu* → *eTendering* → *Maintain Events* → *Event Workbench*. Search for the event ID and click on *Analyze Event*.

Indicate for each bid if it is awarded, rejected, or not awarded (NA). It is possible to choose *Award* for several bidders, in case of split award.

When you have indicated all award actions, go to the bottom of the page and press *Save*.

11.2 SPECIFY AWARDED QUANTITIES

For the next step, which is to reflect the award in eTendering, click on *Award Summary*.

Specify the quantities to be awarded for each line, and then save. Please note the following:

- The awarded quantity can be less than the event quantity. In this case, the remaining quantity can be awarded to a new PO.
- The awarded quantity cannot be higher than the event quantity. However, you can increase the quantity at the PO page as explained below.
- It is possible to split quantities of each line, or award different lines to different bidders. To split award to more than one bidder, you must first select *Award* to all relevant bidders and thereafter indicate the quantity awarded to each of them.

When the award quantities are indicated, press *Save*.

11.3 CREATE PURCHASE ORDER

Once the award is indicated in eTendering, it is possible to create a Purchase Order with the contract information automatically taken from eTendering, including the COA (if requisition was used when creating the event), line items, price information, item quantity, due date, etc.

Note: Once the contract is created, the system will send automatic notifications to all non-awarded bidders. Therefore, it is strongly recommended to communicate to the awarded bidder(s) and confirm their continued interest and acceptance of the contract before continuing the next steps.

11.3.1 Check for duplicate vendor

eTendering is linked to the Vendor module in Atlas and it is possible to automatically create a vendor with the bidder account details. But before creating a new vendor, the buyer must always check if the bidder already exists in the vendor database for the concerned BU in order to avoid vendor duplicates.

The first place to check if the bidder is also registered as a vendor is to go to *Event Workbench* and find the relevant event. Click on *Analyze Event* and then *Award Details*.

If the button marked in red says *Post Award*, the bidder is already linked to a Vendor, and you can proceed to create the Purchase Order.

If the button says *Create Vendor*, the bidder is not linked to an Atlas vendor.

Note: The first time a Purchase Order is created through eTendering for a new bidder, the button will say *Create Vendor* regardless of whether the bidder is already registered as a vendor in Atlas or not. The buyer need to reconfirm in the vendor database whether the vendor already exists or not before proceeding.

If the bidder is not linked to a vendor, confirm whether the vendor already exists in the Vendor Database in the same way as when creating a PO from a procurement process that has not been managed through eTendering.

If the company already exists as a vendor in the database, continue to link the bidder with the vendor profile, as described in section 11.3.2   Link vendor to bidder.

If the company does not exist as a vendor, proceed to create the vendor through eTendering as described in section *11.3.3*   Create new vendor from bidder.

11.3.2 Link vendor to bidder

To link the bidder to an existing vendor profile in Atlas, start by clicking on the Bidder Name from the *Analyze Event*-page.

Analyze Events

Analyze Total   Analyze Line   Review Constraints   Award Summary   Award Details   Public Bid Opening Notification

Business Unit:	Event ID:	Round:	Version:	Event Name:
UNDP1	0000000664	1	2	UNDP eTendering User Guide 2016

Event Format:	Event Type:	Currency:	End Date:		Status:	Go To:	
Buy	RFx	USD	06/06/2016 10:00 EDT		Pend Award	...	

▼ Bid Analysis and Display Options

Header Weighting:		Sort Bids By:	Total Event Score ▼		Sort Order:	Descending ▼		Analyze
Display Options	View Factor Responses ▼		☐ Display Delta Responses		☐ Display Disqualified Bids		☑ Display Withdrawn Bidders	
View Bid Actions	☑ All Bid Actions	☐ Award	☐ Counter	☐ Disallow	☐ Reject	☐ <No Action>		

Analysis

Bidder Name		Test Elisabet 4	Elisabet Test 5	Test Elisabet 2016 1
Event Version:		1	1	1
Bid Number:		1	1	2
Total Bid Amount:		200.0000	250.0000	260.0000
Total Bid Cost		200.00	250.00	260.00
Total Event Score:		100.0000	75.6000	70.7000

It will lead to the bidder information page, where the *Bidder ID* will be displayed. Write down this number.

Bidder Information

Bidder ID:	0000011552		ShortName:	Elisabet Test
Name:	Elisabet Test 5			
Location:	MAIN			

Details

Name:	Elisabet Test 5		Prefix:	
Title:			Phone:	123456789
Country:	USA	United States	Ext:	
Address 1:	test			
Address 2:			Prefix:	
Address 3:			Fax:	
Address 4:				
City:	test			
County:		Postal:		
State:	NY			
URLID:			View Internet Address	
Email ID:	elisabet.lundqvist@undp.org			

[OK]   [Cancel]   [Refresh]

Then go to *Main Menu* → *Vendors* → *Vendor Information* → *Add/Update* and search for the vendor. Click on the tab called *Custom* and type the Bidder ID.

Click on *Save* and follow up for the approval as relevant.

Note: The bidder is linked to an existing vendor only once. After it is linked, the system will recognize the vendor and the *Create Vendor* button on the *Award Summary* page will instead display *Post Award* for future events.

11.3.3 Create new vendor from bidder

If the bidder is not registered as a vendor in Atlas already, the buyer needs to create a vendor account before proceeding. To do this, indicate the correct Business Unit and thereafter click on *Create Vendor*.

Note down the vendor ID and click *OK*.
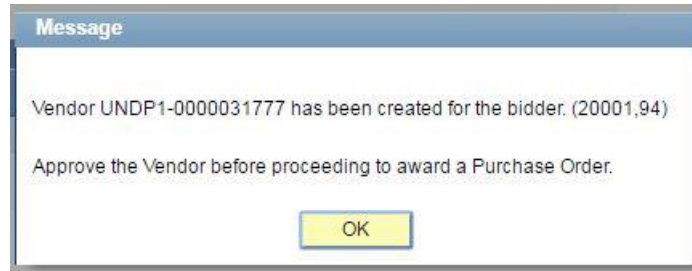
Then, open the vendor record from *Main Menu* → *Vendors* → *Vendor Information* → *Add/Update Vendor* and search for the vendor ID.

eTendering has now recorded the bidder as a vendor, and transferred the information that the bidder provided during the registration process in eTendering. This information includes company name, contact details and addresses. The buyer needs to complete the vendor profile by adding necessary information, such as banking details.

When the vendor profile in Atlas is updated, approval is sought from the manager as usual.

Once the vendor has been approved, go back to eTendering to create the Purchase Order.

11.3.4 Create Purchase Order

Once the bidder is linked to the Atlas vendor, it is possible to create the Purchase Order from eTendering. To do so, go to *Main Menu* → *eTendering* → *Maintain Events* → *Event Workbench* and search for the event. Click on *Analyze Bids* → *Award Details*.

The button that under section 11.3.1   Check for duplicate vendor and 11.3.3   Create new vendor from bidder said *Create Vendor* have now changed to *Post Award*.

Indicate the Business Unit and the award currency, which can be either the event or bid currency.

If the product is normally supplied by this company, it is possible to link the vendor to the item by ticking the box named *Vendr/Item Rel*. If the product is not normally supplied by from this company, leave the box unticked.

Note: When the *vendr/Item Rel* box is ticked, the vendor will be linked to the item ID in the procurement catalogue. This can serve as an important tool for the buyer to identify potential vendors for specific items. Therefore, it is important to pay due attention and use this link only when the product is commonly purchased from the vendor.

Click on *Post Award*. A new browser window will be opened with the Add/Update PO page. Make sure that the pop-up blocker is de-activated.

From the new PO page, any changes can be made as necessary.

Note: It is not possible to customize the PO number when creating a PO through eTendering, it will be generated automatically by the system.

11.3.6 Non-award notifications

At the moment of posting award as per the above instructions, eTendering will automatically send non-award notifications to bidders that have been given one of the following award statuses:

- NA (Not Awarded)
- Rejected
- Disallowed/Disqualified

Note: eTendering does not send any award notification to the awarded bidder. The procurement focal point must contact the awarded bidder themselves.

The email sent out by eTendering is generic and does not provide any explanation as to why the bidder has not been awarded the contract. To elaborate the reasons for non-award, buyer must contact the bidders individually. Please see an example of the email generated by the system below.

Non-Award Notification

This event has been awarded to other bidders and has been closed. Thank you for participating in this event.

Event Details
Event ID: AFG10 - 0000000960 Round 1 Version 2
Name: Test event-non award notifications

11.3.7 Closing an eTendering event manually

When all line items in an eTendering event have been sourced to a Purchase Order, the system will automatically close the event. If there is no Purchase Order created through eTendering, the procurement focal point will have to manually close the event once the contract is awarded.

To close the event manually, find the relevant event through *Event Workbench* and go to *Analyze Bids → Award Summary*.

Change the status of each line item from *O* (Open) to *C* (Closed) and press *Save*. Depending on how the quantities have been awarded, the status of the event will be either:
- **Awarded**: If the complete requested quantity is allocated to one or more bidders.
- **Not Awarded**: If no bidder or quantity is indicated as awarded.

Note: Closing of the event manually will trigger the system to send the non-award notifications to unsuccessful bidders. Therefore, the buyer must ensure that the correct award quantities are indicated before proceeding.

12   PUBLISH AWARD

Currently, UNGM and UNDP Procurement Notices are not linked to eTendering. Therefore, the system cannot automatically publish any award through eTendering.

The procurement focal point for the respective process must ensure that the award is published at all relevant sites as required in the POPP.

13   COMMON DEFINITIONS

Below is a list of most common terms used in the eTendering system and their definitions:

Bid   A submission of an offer on an event.

Bid Factor   An element of an event, that may or may not be cost-related, which factors into the award of an event. Bid factors can be assigned weightings and used to determine the best bid.

Examples of bid factors include price, product warranties, service level agreements, and defect ratings.

Bidder   Anyone registered to place a bid on an event. The term *bidder* applies whether it is a sell event or a buy event.

Business Unit   An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Buy Event   In a buy event, the event creator wants to buy goods or services. In addition to price, the creator may specify other bid factors and assign weightings, which factors into the award decision. Bidders must submit their bids, including responses to the bid factors, by a specified End Date at which time the bids are evaluated and the event is awarded. In PeopleSoft Strategic Sourcing, there are three types of buy events:

Sealed RFx: Also known as a request for quote. Each bidder submits one bid by the specified End Date, at which time the bids are evaluated and the event is awarded. System restricts viewing the bids until after the event has ended.

End Date   The date and time the event closes meaning that bids are no longer accepted.

Event Creator   The originator of the event.

Factor Type   The type of information being requested on the bid factor, such as monetary, numeric, date, text, yes/no, list, or separator.

Preview Date   The time available before an event's start date. During preview, bidders may view the event, and may enter bid data into the system but not post it. Having a preview time for an event is optional.

Public Event   An event on which any person or organization may bid.

RFx   A request for information or request for quote event in which each bidder bids once; bidders cannot see each others' bids and scores.

Sell Event   Most familiarly known as an *auction*. In a sell event, the event creator offers a good or service for sale. In addition to price, the creator may specify other bid factors which helps determine the award decision. Bidders must submit their bids, including responses to the bid factors, by a specified end date at which time the bids are evaluated and the winners are declared. In PeopleSoft Strategic Sourcing, there are two types of sell events:

Auction: All bids and scores are visible to all bidders. Bidders can enter multiple

bids, to beat the current highest-scoring bid.

RFx: Each bidder submits one bid by the specified end date, at which time the event creators evaluates bids and awards the event. Bidders never see others' bids but the event creator can see all bids throughout the event.

SetID   An identification code that represents a set of control table information or tablesets. A tableset is a group of tables (records) necessary to define your organization's structure and processing options.

Start Date   The date and time at which the event becomes open for bidding.

User ID   The system identifier for the individual who generates a transaction.

Weighting   Both bid factors and line items are weighted to reflect their level of importance. Weighting is used to analyze and score bids.

14   EDIT LINE ITEMS AND BID FACTORS

If a bidder has already submitted a bid for an event that is later changed by UNDP, eTendering will automatically transfer the bid for the previous version to the new one. However, if the line items or bid factors have been edited, the system cannot do the automatic matching of bids, and some additional actions are required.

Note: Edits of line items and bid factors are strongly discouraged. However, if such changes are necessary, the buyer must follow the instructions below and ideally also contact the eTendering focal points at PSU for further advice and guidance before proceeding.

Firstly, check the bidder participation for the event, instructions are found in section *8.1 VIEW BIDDER PARTICIPATION*. If no bids have been submitted to the tender, the buyer may go ahead and make the changes swiftly and ensure that approval is obtained before any bids have been posted.

If any bids have already been submitted towards the tender, it is highly recommended to not modify line items or bid factors. However, if the changes are necessary and if the proper steps are followed by both buyer and bidders, the system will still allow the changes. However, depending on the type of changes made and whether the bidders follow the correct steps, the buyers may not be able to view some of the bids when the event is closed.

If you want to change bid factors or line items, the below are some general steps that need to be followed for changing line items or bid factors. However, you must contact PSU for further guidance and detailed instructions if changing the line items or bid factors is necessary.

For the buyer, make amendments as per the guidelines provided in section *8.4 AMEND EVENT*. Please ensure that, if the line items are modified, the weighting is adjusted to make a total of 100% and that no line item is with weighting 0%.

Note: If any bidder has submitted a bid to the previous version, they must be instructed to cancel their previous bid and submit a new one. In this case, it is not possible for bidders to choose *Edit* of their existing bid!

To give bidders this instruction, it is recommended to enter the following paragraph in the description box and include in any new attachments:

> *Line Items have been changed. If you have already submitted a bid for the original version, it is not valid anymore. You must cancel your previous bid and submit a new bid.*

Also ensure that the special instructions for bidders in case of amendments to line items or bid factors is attached to the event in eTendering. This guide is also found in *Appendix III: In case of changes in line items or bid factors* in the *eTendering Instructions Manual for Bidders March 2016*.