



Guiding Document on using eTendering for Managing UNDP Tenders

FEBRUARY 2015

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1 INTRODUCTION

eTendering is a module within web-based PeopleSoft online system that enables UNDP buyers to manage the tender processes and communication with bidders online. It is part of ATLAS and as such is fully integrate able with other ATLAS modules. It brings considerable benefits for both UNDP and bidder community, such as:

- Automates and streamlines several of the procurement processes;
- Enables cost savings by eliminating or automating several of the tender processes and actions;
- 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 more green and sustainable office;
- Increased bidder confidence in UNDP tender processes;
- Streamlines the bidding process for bidders

The system has been rolled out to two Regions and is soon expected to be rolled out across UNDP. All UNDP Country Offices are expected to use the system for all International Competition tenders. Country Offices are encouraged to use the system also for local competition cases.

Procurement Support Office (PSO) in New York and Copenhagen provides constant supports to eTendering users through trainings, resource materials, ad-hoc support, etc.

2 GETTING STARTED

This section describes the main activities that must be accomplished by a Country Office in order to prepare for a smooth rollout of eTendering system in their office.

2.1 PRE-REQUISITES FOR USING THE SYSTEM

Before starting to use the system, you must accomplish few steps in order to meet some pre-requisites for using the system:

- Train system users. All buyers must receive training in the system. Procurement Support Office has developed several training materials which can be utilized. In addition, periodic or ad-hoc classroom trainings will be organized.
- Translate Bidder User Guide in local language. The Bidder User Guides are in English language and therefore need to be translated into local language.
- Train local bidder community. Three approaches can be followed:
 - Open invitation to all suppliers, deciding on a maximum number of participants and “first come first serve basis”. Include the additional suppliers in next training event;
 - Focus target with suppliers who do regular business with UNDP;

- As part of a specific procurement process, with suppliers interested in submitting bid.
- Assign focal point/s for eTendering. It is recommended that 1-3 persons 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 additional and more in-depth training on the system.
- Identify system users. Buyers will automatically have access to the system. Approvers need to be identified by management and right access provided.

2.2 SYSTEM PROFILES

ATLAS has 4 main profiles in eTendering system:

1. Buyer/Event creator. This profile can create and modify events for any BU. They can also review bids received, restricted to events created only in their respective BU. All ATLAS buyers have this profile by default.
2. Super-User Profile. This profile is similar to “Event creator” with difference that they can also view bids received in other BUs. This profile is usually given to buyers located in Regional and HQ who manage procurement processes on behalf of other BUs. This access is granted on ad-hoc bases by OIST based on a request by BU manager and reviewed by Procurement Support Office.
3. Event Approver. This profile can approve events created by Buyers. It is given per BU by respective Argus Focal point, based on decisions and approval made by BU Senior Management. This profile is usually given to same persons that have the right to approve Solicitation documents (ITBS, RFQ, ect) in that BU.
4. Collaborator. Collaborator is someone who has been invited by buyer to review events (solicitation documents) or bids (evaluation) for a specific case. Any ALTAS user can have this profile which is given only once. Buyer then will invited them on specific events and collaborator will have full access but only for those specific events. **This profile is currently not functional.**

2.3 TRAINING RESOURCE MATERIALS

Procurement Support Office has developed several training and other resource materials. They can be found in PSO Intranet, online library section, folder corresponding for eTendering. These include training guides, FAQ documents, presentations, reports, webinar links, solicitation document templates, etc.

In addition, PSO has developed several templates in eTendering system corresponding to most common procurement types (RFQ, RFP, ITB, and IC) which will facilitate the use of the system. ***Note: It is responsibility of the buyer to ensure that the chosen template contains the correct information before the event is created and launched.***

3 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	<p>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.</p> <p>Examples of bid factors include price, product warranties, service level agreements, and defect ratings.</p>
Bidder	Anyone registered to place a bid on an event. The term <i>bidder</i> 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	<p>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:</p> <p><i>Sealed RFx</i>: 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.</p>
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	<p>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.</p>
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	<p>Most familiarly known as an <i>auction</i>. 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:</p> <p><i>Auction</i>: All bids and scores are visible to all bidders. Bidders can enter</p>

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.

4 PREPARING FOR AN EVENT

Preparing for an event refers to activities and tasks that are conducted outside the system, before the event is event created. Generally, these activities do not differ from normal preparation activities conducted when the procurement process is managed outside the system. 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

At this phase, you decide on the procurement strategy that you will follow. This is not a specific requirement for eTendering, however, some of the aspects that will be decided at this phase, will affect how the event will be set up in the system. Therefore it is useful to have those clearly identified from the beginning. Below is a sample checklist of what you need to consider at this stage. Please note this 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 going to be an RFP, ITB, or RFQ?
- Is it going to be an open or limited competition?
- Will there be any LOTS?
- Is partial bidding allowed?
- What are the minimum requirements and other evaluation criteria?
- What is the expected End date?
- Who will be the focal point? Etc.

The above information will affect how the event will be setup in the system, and in turn, which templates would be best to use, therefore it is important that it is thought upfront prior to creating the event online.

4.2 PREPARE SOLICITATION DOCUMENTS

Once the procurement strategy and setup is development, you 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: how bids are submitted, how bidders can edit their bid, etc.

4.3 CHOOSE TEMPLATE IN THE SYSTEM

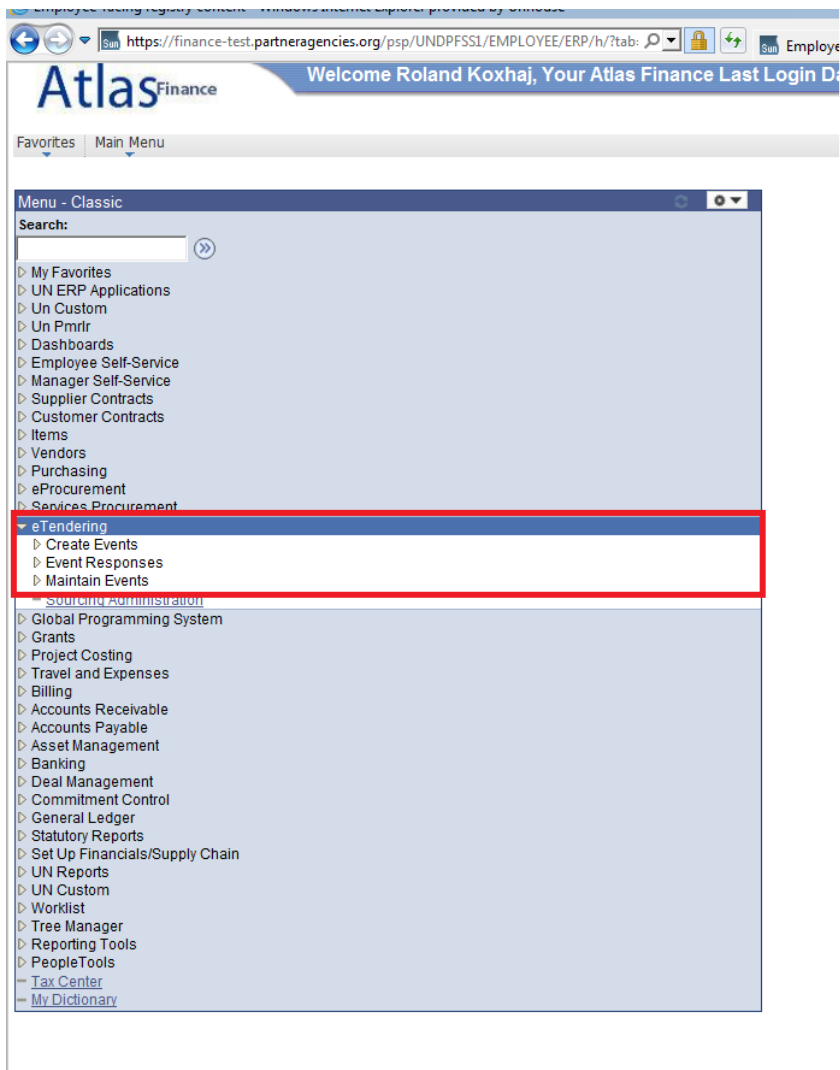
Several templates have been created in eTendering system. These templates enable the buyer to create the event much faster and in a more standardized manner. An inventory of the available templates, with corresponding bid factors, can be found at PSO shared library on intranet.

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 however, to ensure that the setup and information included is accurate and responds to the specific procurement process.

5 LAUNCH AND MANAGE A SOLICITATION PROCESS

For this section onwards, this document describes the actions that you need to do in order to manage your solicitation process through eTendering. This is not a complete and detailed system user manual. For practical reasons, in order to simplify this document and make it easier for reader, it focuses mainly on the essential actions/steps that a user need to perform in order to manage a procurement process in the system. Other more elaborate technical instructions can be found in other technical manual available in PSO intranet, or can be made available upon request.

To go to eTendering module, click on eTendering link under main menu in ATLAS.



5.1 CREATE AN EVENT

The first step is to create an event. There are several ways of how to create an event, each of them described in detail below.

5.1.1 Create Event from a Template

STEP 1 Initiate Event Creation

Go to: eTendering >>> Create Events >>> Event Details



STEP 2 Select BU

Choose BU, Event ID, and other parameters

https://finance-test.partneragencies.org/psp/UNDPF331/CMR

Atlas Finance Welcome Roland Koxhaj, Your Atlas

avorites | Main Menu > eTendering > Create Events > Event Details

Create Events

[Find an Existing Value](#) [Add a New Value](#)

Business Unit:	UNDP1	Select BU
Event ID:	NEXT	Select Event ID. Leave it Next for system to generate a sequential No
Event Round:	1	
Event Version:	1	
Event Format:	Buy	Keep Event Format as "Buy" and type as "RFX"
Event Type:	RFX	
Proxy Bidding (Auctions Only):	Disabled	

[Add](#) Click on "Add" to continue to next page

[Find an Existing Value](#) | [Add a New Value](#)

Note: If you choose your own event ID, make sure that it contains a normal character and is not composed by numbers only. Otherwise system will not accept it if that number has already been used. If you leave it as "Next", system will generate a sequential ID number (similar like with Purchase Orders).

STEP 3 Copy Template

1. Initiate copy Template process

Atlas Finance
Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 13.Nov.2014 14:16:36 GMT

Favorites
Main Menu
eTendering
Create Events
Event Details

Create an Event

Event Summary

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

Event Type: RFX
Event Status: Open
*Event Name:
Descr:

Preview Date:
*Start Date:
*End Date:
Copy From: Sourcing Template Go

Contract
Delimited File
Item Master
Purchase Order
Request For Information
Requisition
Sourcing Event

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](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items
Create line listings for this event.
[* Line Items](#)
[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](#)

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

Open the dropdown list from "Copy from" and select "Sourcing Template"

2. Search for and select desired template:

Enter Copy Criteria

Copy Template
 Copy From: Sourcing Template

Select Criteria
 Business Unit: UNDP1 Make sure BU is UNDP1. All templates are stored under UNDP1 BU.
 *Copy Method: Override
 Event Type: Rfx Select event type as "Rfx"

Copy Criteria
 Template\Event ID: Click on the loop to search for templates
 OK Cancel Refresh

Look Up Template\Event ID

Business Unit: UNDP1
 Event Format: Buy
 Event Type: Rfx
 Event ID: begins with
 Template Type: = Business Unit
 Template ID: begins with
 Template Description: begins with

Look Up Clear Cancel [Basic Lookup](#)

Search Results
 View 100 First 1-7 of 7 Last

Event ID	Template Type	Template ID	Template Description
0000000021	Bus Unit	RFP_SIM_1	(blank)
0000000024	Bus Unit	RFP_DET_1	(blank)
0000000026	Bus Unit	IC_DET_1	(blank)
0000000028	Bus Unit	ITB_SIM_1	(blank)
0000000029	Bus Unit	ITB_DET_V1	(blank)
0000000030	Bus Unit	IC_SIM_V1	(blank)

Various filters for searching templates.

Select desired template

3. Copy Line items from template.

Atlas Finance

Favorites | Main Menu > eTendering > Create Events > Event Details

Event Lines to Copy

☒ [Select All](#) ☐ [Deselect All](#)

Select Lines										
Personalize	Find	View All	First	1-2 of 2	Last					
Sel	Item	Description	Quantity	UOM	Price	Currency	Business Unit	Event ID	Due Date	Ship To
<input checked="" type="checkbox"/>		INSERT ITEM DESCRIPTION AND CORRECT CATEGORY	1.0000	EA	1.00000	USD	UNDP1	0000000028		
<input type="checkbox"/>		INSERT ITEM DESCRIPTION AND CORRECT CATEGORY	1.0000	EA	1.00000	USD	UNDP1	0000000028		

4. Save event and return to main page

Favorites | Main Menu > eTendering > Create Events > Event Details

Create an Event

Line Items

Business Unit: UNDP1 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From:

Line Items										
Personalize	Find	View All	First	1 of 1	Last					
Basic Definition		Advanced Definition								
Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting		
1		INSERT ITEM	381000	EA	1.0000	1.0000	\$1.00	0.00000	<input type="button" value="+"/>	<input type="button" value="-"/>

Event Total: 1.0000 USD Line Weighting Total: 0 % Remaining Weight: 100 %

GoTo:

[< Return to Event Overview](#)

Save Event changes and then click on "Return to Event Overview"

From event main page, click on "Line Items"

STEP 4 Copy Requisition and complete Price Schedule

1. Delete line item that was copied from template.

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 13.Nov.2014 16:05:23 GMT

Favorites | Main Menu > eTendering > Maintain Events > Event Workbench > Event Details

Modify an Event

Enter Copy Criteria

Business Unit: UNDP1 Event ID: 0000000146 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From:

Line Items Personalize | Find | View All | First 1 of 1 Last

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting	
1		INSERT ITEM	381000	EA	1.0000	1.0000	\$1.00	0.00000	<input type="button" value="+"/> <input type="button" value="-"/> <input type="button" value="Delete"/>

Event Total: 1.0000 USD Line Weighting Total: 0 % Remaining Weight: 100 %

GoTo:

[< Return to Event Overview](#)

Delete Confirmation

Delete current/selected rows from this page? The delete will occur when the transaction is saved.

2. Start process for copying line items from Requisition.

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 13.Nov.2014 16:05:23 GMT

Favorites | Main Menu > eTendering > Maintain Events > Event Workbench > Event Details

Modify an Event

Enter Copy Criteria

Business Unit: UNDP1 Event ID: 0000000146 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Select "Requisition" from the dropdown box from "Copy from" and click on "Go"

Line Items Personalize | Find | View All | First 1 of 1 Last

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting	
1								0.00000	<input type="button" value="+"/> <input type="button" value="-"/>

Event Total: 0.0000 USD Line Weighting Total: 0 % Remaining Weight: 100 %

GoTo:

[< Return to Event Overview](#)

3. Find requisition

Event Details - Windows Internet Explorer provided by Unhouse

https://finance-test.partneragencies.org/psp/UNDPFSS1/EMPLOYEE/ERP/c/AUC. Event Details

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 13.Nov.20

Favorites Main Menu > eTendering > Create Events > Event Details

Create an Event

Enter Copy Criteria

Copy Template

Copy From: Requisition

Select Criteria

Business Unit: UNDP1 **Select BU where the Requisition has been raised**

*Copy Method: Append **Choose copy method as "Append" and select "Req Lines"**

*Select Lines: Req Lines

Copy Criteria

Req ID: 0000031353 **Enter Requisition ID**

Buyer: Vendor SetID: Vendor ID:

SetID: Item ID:

Category:

☐ Exclude Auto Source Item ☐ Stockless Item ☐ Copy all Req/RFQ lines

☐ Include Inventory Items ☐ Include Reqs With No Vendor

OK Cancel Refresh **Additional search criteria on requisiton lines**

Click OK

Make sure the “copy method” is selected as “Append”.

4. Select Line items from Requisition

https://finance-test.partneragencies.org/psp/UNDPFSL/EMPLOYEE/ERP/c/AUC... Event Details

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 13.Nov.2014 14:20:26 GMT

Favorites Main Menu eTendering Create Events Event Details

Requisition Lines to Copy

☒ Select All ☐ Deselect All

Select Lines	Item SetID	Item	Description	Quantity	UOM	Price	Currency	Due Date	Business Unit	Req ID	Vendor	Buyer	Ship To
<input checked="" type="checkbox"/>	SHARE	24112458E	G) Cardboard Recyc booth Lam	10.0000	EA		USD	31/12/2014	UNDP1	0000031353		roland.koxhaj	UNDP1

OK Cancel Refresh

You can choose only some of the lines of the requisition. Once a line has been sourced into an event, it will not show in next search for that Requisition and cannot be sourced again.

Once all of the line of a requisition have been sourced to an event, that requisition will not show in next search and cannot be sourced again to an event.

5. Complete line items.

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 13.Nov.2014 16:05:23

Favorites Main Menu eTendering Maintain Events Event Workbench Event Details

Modify an Event

Line Items

Business Unit: UNDP1 Event ID: 0000000146 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Requisition Go

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1	24112458E	G) Cardboard Recyc booth Lam	GVOTINGBOOTH	EA	10.0000	250.0000	\$2500.00	0.00000
2		Air Freight to	713000	LS	1.0000	50000.0000	\$50000.00	0.00000

Event Total: 52500.0000 USD Line Weighting Total: 0 % Remaining Weight: 100 %

Add as many line items as necessary.
Do not delete or edit Item Id of the line item that was copied from Requisition

GoTo: Go

[Return to Event Overview](#)

Save Event Changes

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

Aspect to consider:

- ***This is the price schedule.*** To avoid potential mathematical errors on the part of bidders, resulting in bid prices not matching, do not request bidders to provide detailed pricing in a separate document.
- Make sure that the order of the items here corresponds to the order of same items in the Technical Requirement and Specifications, TOR, or anywhere else in the solicitation documents.
- The item description comes automatically with the Item ID from catalogue. If necessary to elaborate/explain more on the item description, use line item comments (explained further below).
- Do not delete or edit the Item ID for the lines that were copied from requisition. If you do so, the requisition will show in the system as outstanding and yet not sourced.
- For line items added additionally in the event, you can search by “category” and leave the Item ID blank. In this case, you can customize item description. Use this only when absolutely necessary. **It is highly recommended to use Item ID.**
- Complete Start price field. This may come from the requisition. This information is internal and is not shown to bidders.

6. Complete Line item Shipping information and settings.

[Favorites](#) | [Main Menu](#) > [eTendering](#) > [Maintain Events](#) > [Event Workbench](#) > [Event Details](#)

Modify an Event

Line Items

Business Unit: UNDP1 **Event ID:** 0000000146 **Round:** 1 **Version:** 1 **Event Format:** Buy **Event Type:** RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From:

Line Items								Personalize Find View All	
Basic Definition								Advanced Definition	
Line	Item ID	Description	Item SetID	Details	Bid Factors	Constraints			
1	24112458E	G) Cardboard Recyc booth Lam	SHARE	Details	Bid Factors	No			
2		Air Freight to	SHARE	Details	Bid Factors	No			

Event Total: 52500.0000 USD Line Weighting Total: 0 % Remaining Weight: 100 %

GoTo:

[Return to Event Overview](#)

Select “Advanced Definition” tab and on “Details” link. From the following page you can customize the following:

- Shipment method from “Ship Via” field;
- Due date;
- Shipping destination from “Ship to” field;
- Incoterms from “Freight Terms” field.

You can set shipping information individually for each item. If these parameters are the same for all line items of the event, you can set them as default for all lines, from “Item Line Defaults” tab at event main page.

7. Select bidding parameters for line items.

The screenshot shows the 'Atlas Finance' web application interface. At the top, a welcome message reads 'Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 13.1'. Below this is a navigation bar with links: Favorites, Main Menu, eTendering, Maintain Events, Event Workbench, and Event Details. The main heading is 'Modify an Event'. Underneath, the 'Line Details' section displays the following information:

- Event ID: 0000000146
- Line: 1
- Item ID: 24112458E
- Description: G) Cardboard Recyc booth Lam
- Requested Quantity: 10.0000
- Start Price: 250.0000
- Physical Nature: Goods (dropdown menu)

The 'Shipping Information' section is highlighted with a red box. It includes fields for:

- Schedule: 1
- Quantity: 10.0000
- Due Date: 31/12/2014
- Freight Terms: (empty field)
- Ship Via: COMMON
- Ship To: DNKPSO
- Ship From: (empty field)

The 'Bid Parameters' section is also visible. It includes:

- Reserve Price: (empty field)
- Min Quantity: 0.0000
- Max Quantity: 10.0000
- Bid Required: ☒
- Bid Quantity Rule: Requested Quantity Required (dropdown menu, highlighted with a red box)
- Alternate Units of Measure: Not Allowed (dropdown menu)
- User Defined Price Breaks: ☐
- Bidder Defined Price Breaks: ☐

At the bottom, there are tabs for 'Item Specification' and 'Line Image'. Below these tabs are three buttons: OK, Cancel, and Refresh. The 'OK' button is highlighted with a red box.

Select “Bid Quantity Rule” - what quantities can bidders bid for - from the drop down list. You can select one of the following options:

- “Requested Quantity Required” – Bidders cannot modify quantity. Bidders can only provide a price for the quantities requested by buyer. This is the most common scenario and is set as default in the system.

- “Allow extra quantity to be bid” - Bidders can modify quantity and bid more than the quantity required by UNDP.
- “Bid up to maximum quantity” – Bidders can modify quantity and bid same or less than the quantity required by UNDP. They cannot bid more.
- “Quantity not Applicable” – No quantity field. Bidders will be able to provide only a lump sum price.

8. Complete line item comments and attachments

By clicking on the “bubble” icon beside the line item (from Advanced Definition” tab, you can add comments or attachments for each line item. You can use this mainly to provide more elaborate/customized text for the item description if necessary. Do not use this for detailed specification of the item because a large text will make it cumbersome for bidders. It is recommended that you consolidate the requirement and specifications in one document for all items and provide it as an attachment within the solicitation documents.

Important note: you must view the line item comments in all cases to ensure that information included there, if any, is accurate. If the requester has included any comments or attachments in the requisition, and marked them as “show to vendor”, they will be automatically added to the line item in the eTendering event.

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 13.Nov.2014 16:05:23 GM

Favorites | Main Menu > eTendering > Maintain Events > Event Workbench > Event Details

Modify an Event

Line Comments and Attachments

Event ID: 0000000146 Line Number: 1

Enter Comments Find | View All First 1 of 1 Last

Comments:

Comments

☒ Send To Bidder ☐ Include On Award [Fetch Item Specs](#) [Standard Comments](#)

[Add Attachment](#)

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	Confidential
1 472_Cancel.docx	472_Cancel.docx	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

OK Cancel Refresh

The comments and attached document was brought forward from the requisition. Make sure they are relevant and that need to be shared with bidders. Otherwise revise, remove, or mark as "Confidential"

STEP 5 Complete event general information

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 13.Nov.2014

[Favorites](#) |
 [Main Menu](#) >
 [eTendering](#) >
 [Maintain Events](#) >
 [Event Workbench](#) >
 [Event Details](#)

Modify an Event

Event Summary

Business Unit: UNDP1
 Event ID: 0000000146
 Round: 1
 Version: 1
 Event Format: Buy

Event Type: RFx Change to Auction	Preview Date: 20/11/2014 08:46 EST
Event Status: Open	*Start Date: 20/11/2014 08:46 EST
*Event Name: USERS MANUAL EVENT	*End Date: 11/12/2014 08:46 EST
Descr: Section 1. Letter of Invitation	Copy From: Requisition <input type="button" value="Go"/>

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 Name” – Write the title of your ITB, RFQ, RFP, etc. You can write up to 50 characters.

“Preview date” – is the time when bidders can view the solicitation documents. If preview date is smaller than “Start Date”, bidders can view but cannot submit bids until start date has arrived. This field is optional. Can be left blank or have same value as “Start Date”

“Start Date” – is the time when bidders can start to submit bids in the system.

“End Date” is the time when bidding period is closed. After this time, system will not accept anymore bids.

The timezone is by default in EST/EDT (New York) timezone and cannot be changed. Bidders will also see the same timezone. However, once the event has entered the last 24 hours, bidders will see a countdown clock instead of a time.

“Descr:” box. This is a free text box. If email notifications are sent by the system (more explained below) the text included in this box, will be included also in the email. Copy here the same text that you have in the cover page (Invitation Letter) of your solicitation documents.

STEP 6 Define event basic settings

Click on each of the links under “Define Event Basics” section from even main page, to enter/edit Bid factors, attachments, contact information, etc.

1. Define Event settings and options

Click on “Event Settings and Options”

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 13.Nov.2014

Favorites Main Menu > eTendering > Maintain Events > Event Workbench > Event Details

Modify an Event

Event Settings and Options

Business Unit: UNDP1 Event ID: 0000000146 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

☒ Allow Bidder XML Downloads
☒ Bid Required On All Lines
☐ Alternate Bids Allowed
☒ Allow Edit of Posted Bids

Round/Version Display: Display Round and Version
☒ Sealed Event
☒ Display Bid Factor Weightings

Factor Event Score Into: Total Score Start Price: Do Not Display
Header Weighting:

GoTo: Go **You may change the settings within the red box above, as necessary. Keep the rest of the settings as they appear here.**

Save Event Changes

[< Return to Event Overview](#)

Return to Search Refresh Add Update/Display

Here you can define the following:

- Bid required on all lines. If selected, bidders are required to submit an offer for all line items of the event. If not selected, bidders can choose to submit an offer for only some of the line items. **Select it if Partial Bidding is not allowed.**
- Alternate bids allowed. If selected, system will allow a bidder to submit more than one offer. If not selected, bidder can submit only one offer. **Select it if you want to accept alternative offers.**
- Allow edit of posted bids. If selected, bidders can edit their offer at any time within the bidding period. If not selected, bidders cannot edit their offer, once submitted. **Always select this.**

The rest of the settings should be kept as per the default (as shown in the screenshot above). If for any reason, you want to modify those settings, contact eTendering helpdesk for guidance.

2. Define payment terms and contact information.
Click on “Payment terms and contact information”.

[Favorites](#) | [Main Menu](#) > [eTendering](#) > [Maintain Events](#) > [Event Workbench](#) > [Event Details](#)

Modify an Event

Event Contact Details

Payment & Currency Information

*Currency: [Exchange Rate](#)

Pay Method:

Payment Terms:

Bill Addr:

Buyer:

*Rate Type:

Rate Date:

☒ Allow bids in other currencies

☐ Tax Exempt

Exempt ID:

Rate date should be same with Bid end date.

Event Contact

Contact Name:

Email ID:

Phone:

GoTo:

[< Return to Event Overview](#)

Here you can define the following:

- Currency – Main currency for the event.
- Pay Method – Defines how the eventual awarded bidder will be paid.
- Payment Terms – UNDP standard payment terms.
- Billing address – Where supplier must send invoice for payment.

The above settings will be copied automatically to the Purchase Order deriving from this event.

- Allow bids in other currencies. If not selected, bidders cannot change the bid currency that UNDP has defined. If selected, bidders will be allowed to choose their bid currency. They can choose any currency so you must restrict the option in the Bid Data Sheet, as necessary.
- Rate Date. Determines the UNORE that the system will use to convert all bids into the main event currency at the evaluation stage. If other bid currencies are not allowed, this field is irrelevant.
- Contact name. Focal point for the case, where bidders can address their queries.
- Email ID. Email address for the focal point.

STEP 7 Upload Solicitation Documents

Click on “Event Comments and Attachments” under “Define Event Basics” to upload solicitation documents.

1. Review attachments that came with the Template.

Atias Finance Welcome Roland Roxhuj, Your Atias Finance Last Login Date/Time : 16-Nov-2014 16:00:20 GMT

Favorites Main Menu > eTendering > Maintain Events > Event Workbench > Event Details

Modify an Event

Event Header Comments and Attachments

Event ID: 0000000146

Enter Comments First 1 of 1 Last

Comments: Document attached to this event.

☒ Send To Bidder ☐ Include On Award [Standard Comments](#)

[Add Attachment](#)



Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	Confidential	
1 Section_2_-_Instructions_to_Bidders.pdf	General Instructions to Bidders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2 Section_2.1_-_Data_Sheet.docx	Bid Data Sheet	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
3 Section_3_-_Requirements_and_Technical_Specifications.docx	Technical Specifications and Requ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
4 Section_4_-_Bid_Submission_Form.docx	Bid Submission Form Template	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
5 Section_8_-_Bid_Security_Form.docx	Bid Security Template	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
6 UNDP_GTC_for_Mixed_Goods_and_Services.pdf	UNDP GTCs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
7 Instructions_Manual_for_Bidders_Release_2_-_Nov_2013.pdf	eTendering User guide	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
8 FAQ_for_bidders_Release_No_2_Nov_2013.pdf	eTendering FAQ document	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

OK Cancel Refresh

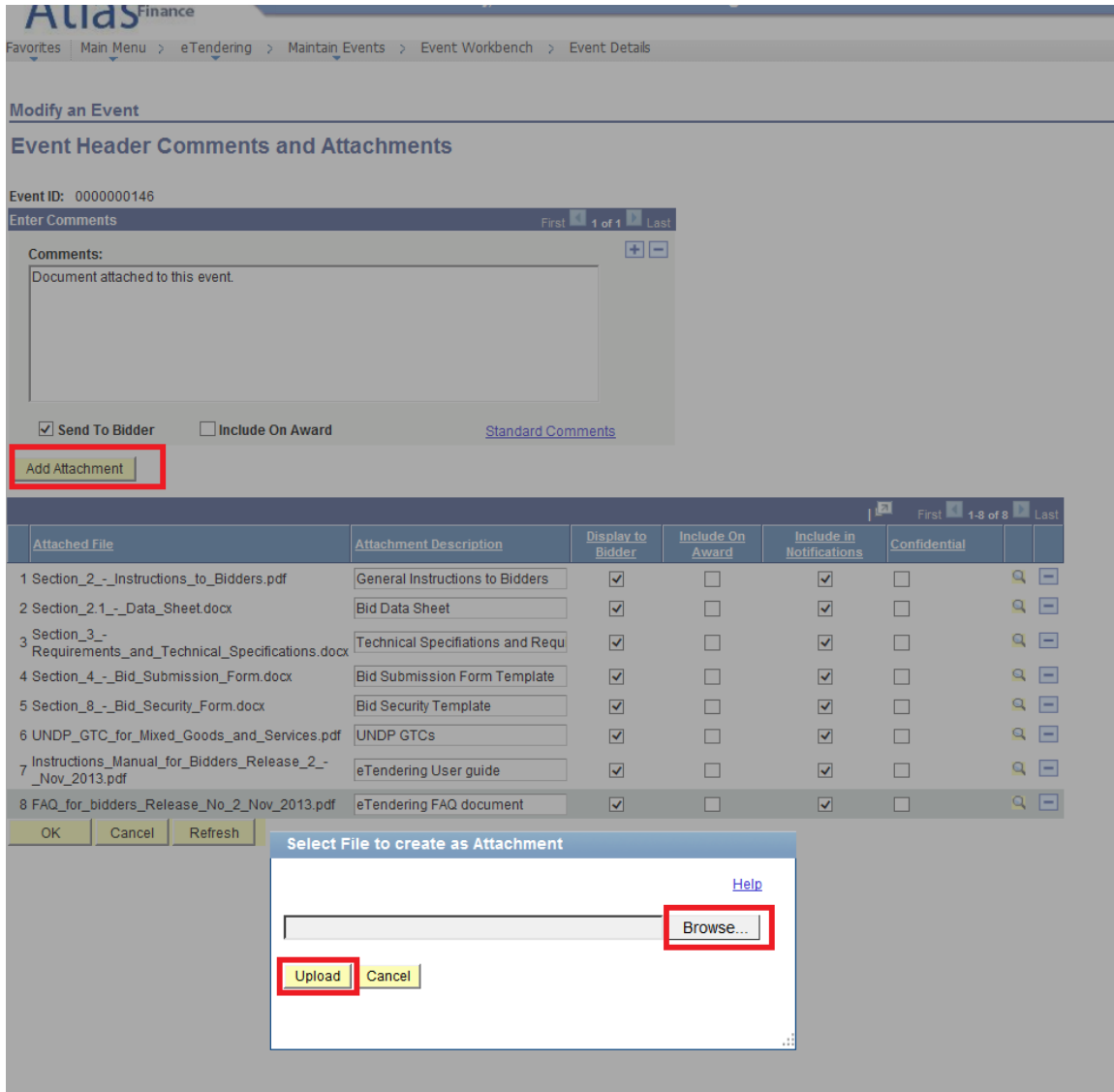
The system template contains the standard documents relevant to the type of procurement process. These documents are of 3 types:

- Generic documents that are usually the same for any process of that type and do not to be changed. For example, the Instructions to Bidders document is the same for any ITB process and should not changed. Same for the UNDP GTCs or the eTendering user guides.
- Specific documents for eac case that are specific depending on what we are buying. For example, Technical specifcations and requirements or TORs, Bid Data Sheet, etc. These documents are normally developed outside the system in advance and only need to be uploaded here. The documents here are blank templates for ease reference. **Remove them and replace with completed ones.**
- General templates for bidders use. This are templates that we normally provide to bidders in editable format to standardize how they complete their offer. For

example, Bid Submission form, Bid Security form, etc. Remove those that are not relevant to your specific case, e.g. if Bid security is not required, remove it.

To view the documents attached, click on . To remove, click on  button beside the respective file.

2. Add new attachments.



Modify an Event

Event Header Comments and Attachments

Event ID: 0000000146

















Enter Comments First 1 of 1 Last

Comments:

Document attached to this event.

☒ Send To Bidder ☐ Include On Award [Standard Comments](#)

Add Attachment

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	Confidential		
1 Section_2_-_Instructions_to_Bidders.pdf	General Instructions to Bidders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
2 Section_2.1_-_Data_Sheet.docx	Bid Data Sheet	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
3 Section_3_-_Requirements_and_Technical_Specifications.docx	Technical Specifications and Requi	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
4 Section_4_-_Bid_Submission_Form.docx	Bid Submission Form Template	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
5 Section_8_-_Bid_Security_Form.docx	Bid Security Template	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
6 UNDP_GTC_for_Mixed_Goods_and_Services.pdf	UNDP GTCs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
7 Instructions_Manual_for_Bidders_Release_2_-_Nov_2013.pdf	eTendering User guide	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
8 FAQ_for_bidders_Release_No_2_Nov_2013.pdf	eTendering FAQ document	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

OK Cancel Refresh

Select File to create as Attachment

[Help](#)

Browse...

Upload Cancel

Click on “Add Attachment”, browse to the folder and select your file, and click on upload.

3. Define file share settings.

Atlas Finance Welcome Roland Roxina, Your Atlas Finance Last Login Date/Time : 10-Nov-2014 10:00:20 GMT

Favorites | Main Menu > eTendering > Maintain Events > Event Workbench > Event Details

Modify an Event

Event Header Comments and Attachments

Event ID: 0000000146

Enter Comments First 1 of 1 Last

Comments: + -

Document attached to this event.

☒ Send To Bidder ☐ Include On Award [Standard Comments](#)

[Add Attachment](#)

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	Confidential	
1 Section_2_-_Instructions_to_Bidders.pdf	General Instructions to Bidders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2 Section_2.1_-_Data_Sheet.docx	Bid Data Sheet	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
3 Section_3_-_Requirements_and_Technical_Specifications.docx	Technical Specifications and Requi	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
4 Section_4_-_Bid_Submission_Form.docx	Bid Submission Form Template	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
5 Section_8_-_Bid_Security_Form.docx	Bid Security Template	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
6 UNDP_GTC_for_Mixed_Goods_and_Services.pdf	UNDP GTCs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
7 Instructions_Manual_for_Bidders_Release_2_-_Nov_2013.pdf	eTendering User guide	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
8 FAQ_for_bidders_Release_No_2_Nov_2013.pdf	eTendering FAQ document	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

[OK](#) [Cancel](#) [Refresh](#)

There are 4 settings that can be selected individually for each file.

- Display to Bidder. If selected, bidders will be able to view that file in the eTendering system. If not selected, bidders will not be able to view it.
- Include on award. If selected, file will be automatically added to the Purchase Order created from the event at the award stage.
- Include in notifications. If selected, file will be included as an attachment to the email notifications sent to bidders.
- Confidential. If selected, file can be viewed **only** by buyers and event approvers of the BU where the event has been created.

STEP 8 Define Bid Factors

Click on “Event Header Bid Factors” to go to the event bid factors.

The system template contains the standard bid factors relevant to the type of procurement process. You can however modify them.

1. Review uploaded bid factors

INVOICES / Main Menu / Bidding / Manage Events / Event Workbench / Event Details

Information that can be modified within existing bid factors is marked in green.

Modify an Event

Event Bid Factors

Event ID: 0000000146 Bid Factor Weighting Total:
Event Name: USER MANUAL EVENT Remaining Bid Factor Weight: 100.00000

Bid Factors			
Seq Nbr:	1	*Bid Factor: SEP_GENERAL_REQUIRE	Type: Separator Weighting: 0.00000
Question:	GENERAL REQUIREMENTS		
<input type="checkbox"/> Select for deletion			
<hr/>			
Seq Nbr:	2	*Bid Factor: SECTION_1_GEN	Type: Yes/No Weighting: 0.00000
Question:	Have you read, understood, accepted and provide all information required in Section 1 "General Instructions to Bidders/Offerors"?		
<input type="radio"/> Yes <input type="radio"/> No			
<input type="checkbox"/> Select for deletion			

Cost Contribution

Bid Factor type is the only parameter that you cannot modify from an existing bid factor.

Aspect to consider:


- Review the text of the question to ensure its accuracy and relevance to your case.
- Is an Ideal response really required?
- What is the ideal response. Ensure consistency in the required response. E.g. all ideal responses are "Yes". Modify the question text if necessary.
- Be aware that, if a bidder does not provide the ideal response when such is required, the system will disqualify their bid.
- Be aware of common human errors on the part of the bidders.


You have a list of "Yes/No" type of questions where for all of them, except one, the ideal response required is "Yes". Bidder will have the tendency to respond "Yes" to all of them, including the one which ideal response was "No". System will warn the bidder, but they may not pay attention and proceed with bid submission. System will then automatically disqualify their bid and it may create issues at later stages.



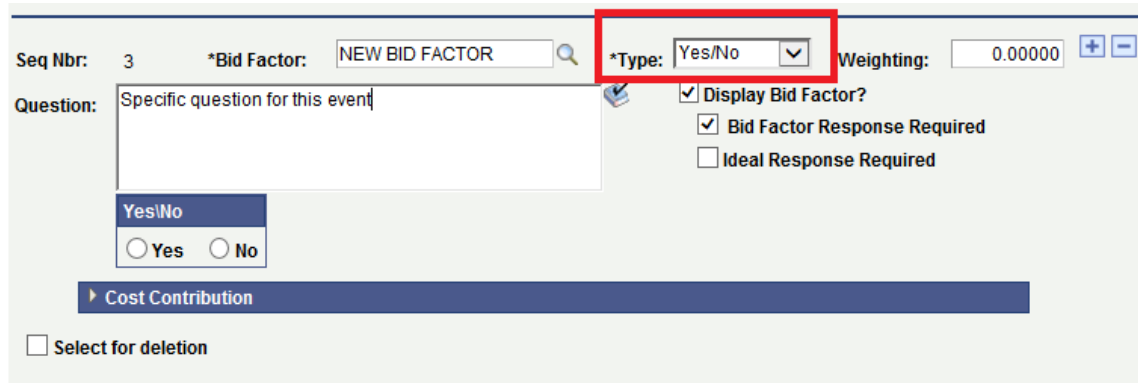
To delete an existing bid factor, click on .

2. Add new Bid Factors

To add a new bid factor, click on . Bid Factor will be added below.

You can choose one of the bid factors currently in the system by searching with the  button, beside Bid Factor field.

If none of the existig bid factors meets the specific need, simply create a new one for the case by completeing the information required.



The screenshot shows a web form for creating a new bid factor. At the top, there is a 'Seq Nbr:' field with the value '3'. Next to it is a '*Bid Factor:' field containing 'NEW BID FACTOR' with a search icon. To the right is a '*Type:' dropdown menu set to 'Yes/No', which is highlighted with a red rectangle. Further right is a 'Weighting:' field with the value '0.00000' and plus/minus buttons. Below these fields is a 'Question:' text area containing 'Specific question for this event'. To the right of the question area are three checkboxes: 'Display Bid Factor?' (checked), 'Bid Factor Response Required' (checked), and 'Ideal Response Required' (unchecked). Below the question area is a 'Yes/No' button and two radio buttons labeled 'Yes' and 'No'. At the bottom of the form is a blue bar with the text 'Cost Contribution' and a 'Select for deletion' checkbox.

3. Bid Factor types

There are several types of bid factors. The type that you choose will determine how bidders will be required to provide their responses.

- Yes/No type. Bidder can select yes or no in their response. This is the most common bid factor. ***Highly recommended to use this type as it is simple to respond.***
- Text type. Bidder can enter text. This is also widely used. It supports large amount of text. Used normally for bidders to enter information that has to be in free text. ***Never select “Ideal Response Required” with this type of bid factor.***
- Date type. Bidder can enter a date.
- Monetary type. Bidder can enter a monetary value.
- List type. Bidder can select on or more from a pre-defined list of options.
- Numeric type. Bidder can insert a number.
- Separator type. Is not a question for bidder. Can be used to organize the bid factors into groupings, with the “Separator” type serving as a header for the group.

9. Copy Line items from template

STEP 9 Define Bidder Invitation

If it is an Open Competition, set the event as public by selecting “Public Event” box.

https://finance-test.partneragencies.org/psp/UNDPPSSI/EMPLOYEE/ERP/C/AUC... Event Workbench

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 13.Nov.2014 16


Favorites Main Menu > eTendering > Maintain Events > Event Workbench > Event Details

Modify an Event

Invite Bidders

Business Unit: UNDP1 Event ID: 0000000146 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

☒ Public Event

Select	Bidder ID	Bidder Type	Name	*Dispatch Method	
1 <input type="checkbox"/>	PUBLIC_AUC	Public	This is a Public Event	Email	


[Search for Bidders](#) Save Bidders as Group

[Save Event Changes](#)

[GoTo:](#) [Go](#)

[Return to Event Overview](#)

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

You can alert bidders (whether registered or not in the eTendering system) by entering their email addresses. Click on  to enter the email addresses for bidders. You can add up to 999 lines. System will send an email with a PDF printed version of the event. **Emails will be sent with all bidders CC as visible. Blind Carbon copy (bcc) is not possible.** Alternatively, you can enter your own email address and then forward the email generated by the system from your Outlook using bcc feature.

Search and enter bidders from the system.

In addition to making the event public, you can also invite bidders directly from the system. Bidders must be registered to be able to find and invite them.

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Date

[Favorites](#) | [Main Menu](#) > [eTendering](#) > [Maintain Events](#) > [Event Workbench](#) > [Event Details](#)

Bidder Search

Search Criteria

Bidder Type: Bidder

Company: State:

ID: City: SIC Type:

Contact: Country: DNK SIC Code:

Group ID: Postal:

Group Name:

[Recommend Bidders](#) Maximum Rows retrieved: 999 [Search](#)

[Select All](#) [Deselect All](#)

Search Results Personalize | Find | View All | First 1 1-14 of 14 Last

	Bidder ID	Name	Bidder Company	Invite
1	0000001390	Roland PSO test 4	PSO TEST 4	<input checked="" type="checkbox"/>
2	0000001390	Roland PSO TEST 4	PSO TEST 4	<input checked="" type="checkbox"/>
3	0000001389	Roland PSO TEST 31	PSO TEST 3	<input checked="" type="checkbox"/>
4	0000001389	Roland PSO TEST 32	PSO TEST 3	<input checked="" type="checkbox"/>
5	0000001388	Roland PSO TEST 2	PSO TEST 2Roland	<input checked="" type="checkbox"/>
6	0000001387	Roland PSO TEST 1	PSO TEST 1	<input checked="" type="checkbox"/>
7	0000001387	Roland PSO TEST 2	PSO TEST 1	<input checked="" type="checkbox"/>
8	0000001385	Roland User Guide 2	User Guide	<input type="checkbox"/>
9	0000001385	Roland User Guide	User Guide	<input type="checkbox"/>
10	0000001383	Roland test test	Testing registration	<input type="checkbox"/>
11	0000001382	Roland Koxhaj 2	ROLAND PSO TEST 2	<input type="checkbox"/>
12	0000001381	Roland Koxhaj	Roland PSO test	<input type="checkbox"/>
13	0000000010	Roland Koxhaj	KoxhajRoland	<input type="checkbox"/>
14	0000000009	Santiago Millan	SANTI MEDICAL	<input type="checkbox"/>

[OK](#) [Cancel](#) [Refresh](#)

Select bidder type as “Bidder” or “Vendor”.

- Companies which are registered in the system but have not been awarded a contract from eTendering system before, are categorized as “Bidder”.
- Companies which are registered in the system, and have been awarded a contract from the eTendering system, and as a result, their “Bidder” record was converted or matched to a “vendor” record, are categorized as “Vendor”. More details in the PO award and vendor matching sections of this manual.

Find and select the correct bidders and click on “OK”.

STEP 10 Invite Collaborators

This feature is currently unavailable.

STEP 11 Post event

You have now completed your event. Click on “Post” to send it for approval to your manager.

The screenshot shows the 'Atlas Finance' web application interface. At the top, a welcome message reads: 'Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 13.Nov.2014 16:05:23 GMT'. Below this is a navigation bar with links: 'Favorites', 'Main Menu', 'eTendering', 'Maintain Events', 'Event Workbench', and 'Event Details'. The main heading is 'Modify an Event'. Below it is the 'Event Summary' section, which includes fields for 'Business Unit' (UNDP1), 'Event ID' (0000000146), 'Round' (1), 'Version' (1), and 'Event Format' (Buy). The 'Event Type' is 'RFx', 'Event Status' is 'Open', and 'Preview Date' is '14/11/2014 08:46 EST'. The '*Event Name' is 'USER MANUAL EVENT' and '*Start Date' is '14/11/2014 08:46 EST'. The 'Descr.' is 'Section 1. Letter of Invitation' and '*End Date' is '11/12/2014 08:46 EST'. There is a 'Copy From' dropdown menu and a 'Go' button. A message box is displayed in the center, stating: 'This will submit the Event for Approval. (18058,207)'. Below the message, it says: 'Once the event is approved and posted you will be limited to the changes that you can make to the event. Click OK to continue or Cancel if you are not done making changes to the event.' The 'OK' button is highlighted with a red box. At the bottom of the page, there are buttons for 'Save Event', 'Post' (highlighted with a red box), 'Save As Template', and 'Preview PDF'.

All managers who are set as event approvers in the BU where the event was created, may receive an email requesting approval.

5.1.2 Create an event from another event

To copy from an event follow same steps as when copying from a Template. The difference is that you must select “Sourcing Event” instead of “Sourcing Template” at the “Copy from” box.

Create an Event

Enter Copy Criteria

Copy Template

Copy From: **Sourcing Event**

Select Criteria

Business Unit: UNDP1

*Copy Method: Override

Event Type: RFX

Copy Criteria

Event ID: 0000000146

Event Name:

Round: 1

Version: 1

Bidder Type:

Bidder ID:

SetID:

Item ID:

Category:

☒ Copy Event Factors/Constraints

OK Cancel Refresh

Make sure the "Copy Event Factors" box is ticked so that bid factors are copies as well.

All information from the original event is copied, except for:

- Preview and Start dates
- Text in the description box
- Attachments.

Review and edit all information as necessary in the same way as you do when you copy from Template. That includes steps 4-11 in section 5.1.1.

5.1.3 Create an event from scratch

You can also create an event from scratch, which is, not copying from a Template or another event. In this case you should complete all fields with the correct information. In any case, you should copy the line items from the Requisition in the same way as described under section 5.1.1.

5.1.4 Create a LOT event

Creating an event where the price schedule consists of LOTs, is no different than other event. The only difference is in how the line items are setup.

In eTendering system, one line item will correspond to one LOT. Sub-component lines (sub-lines) will be added per each line item. These sub-lines will correspond to the items within a LOT.

To create an event with LOTS you can use any of the templates established which fits best your specific case and then make necessary modifications to setup LOTS. There are two possible methods to setup LOTS.

Create LOT event using Price Schedule as a separate document

1. Prepare a detailed Price Schedule listing all items and quantities composing each LOT in a separate document.
2. Create 1 line item per each LOT. In “Item description” field indicate the LOT number and main description of the LOT.
3. Put UOM as “LO” (LOT) and quantity as 1.
4. Enter start price and save event.
5. Upload the Price Schedule file (preferably in excel) with the detailed LOTs and their composition. Make sure that the information in this file matches with the information in the system.
6. Add “Price Schedule” bid factor at the header level, requesting bidders to use the price schedules attached to provide the detailed prices. Instruct bidders that the price they will input in the system for each line/LOT must match with the total price of that LOT deriving from the price schedule in excel. Bidders must submit the detail price schedule as an attachment to their bid.
7. Clarify in the bidding document the method that UNDP will use to correct mathematical

errors.

Ariba Finance

Favorites | Main Menu > eTendering > Create Events > Event Details

Create an Event

Line Items

Business Unit: UNDP1 Event ID: 0000000148 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From:

Line Items Personalize | Find | View All | First 1-2 of 2 Last

Basic Definition **Advanced Definition**

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting	
2		LOT 1 - Description	695000	LO	1.0000	100.0000	\$100.00	0.00000	
3		LOT 2 - Description	695000	LO	1.0000	100.0000	\$100.00	0.00000	

Event Total: 200.0000 USD Line Weighting Total: 0 % Remaining Weight: 100 %

GoTo:

[< Return to Event Overview](#)

Add Update/Display

Create LOTS using Price components feature

1. Create one line item per each LOT.
2. Click on "Advanced Definitions" at Line items level.
3. Click on "Bid Factors" beside each LOT.
4. Expand "Lot Components" and insert 1 line per each item composing that LOT.
5. In the description of the line indicate the description of the item.
6. Input the price (estimated price unit price). The total of the priced included at this level for all items must match the price indicated in at the main level for the corresponding LOT.
7. Input the weighting per each line on "weighting" field. The total for all lines must equal 100.
8. Repeat the same per each LOT.

Atlas Finance
Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 13.Nov.2014 16:05:23

Favorites Main Menu eTendering Create Events Event Details

Create an Event

Line Bid Factors

Line: 2 Bid Factor Weighting Total: 100.00000
Item ID: Remaining Bid Factor Weight: 0.00000
Description: LOT 1 - Description

Bid Factors

Seq Nbr: 1 Bid Factor: PRICE Type: Monetary Weighting: 100.00000

Question: Please indicate the FCA price per unit.

☒ Display Bid Factor
☒ Bid Factor Response Required
☐ Ideal Response Required

Best: 0.000000 Worst: 100.000000

Sum of weighting for all components must total to 100

Lot Components

Component	UOM	Lot Quantity	Price	Weighting
1 Lot 1 - Item 1	EA	10.000000	20.000000	33.00000
2 LOT 1- Item 2	EA	100.000000	30.000000	33.00000
3 LOT 1- Item 3	EA	1000.000000	50.000000	34.00000

Cost Contribution

☐ Select for deletion

Sum of price for all component lines must match with the start price added for the corresponding LOT at line item level (100 in this case)

Add Bid Factors by Group Select Bid Factors Delete Selected Rows

Bid Factor Weighting Total: 100.00000 Remaining Bid Factor Weight: 0.00000

OK Cancel Refresh

Bidders will input the quantity as required per each item and the corresponding unit price. The system will automatically calculate the total price for each LOT.

When the bid is converted to a Purchase Order, the line item of the event (LOT) will be copied as a line item in the PO showing only the quantity of LOTS (usually 1) and the total amount for the lot. The details recorded under "Lot components feature) will not be copied to the Purchase Order Page.

Advantages and disadvantages of each method:

Method	Advantages	Disadvantages
Separate Price Schedule	<ul style="list-style-type: none"> - It is easier for UNDP users to create the event in the system. - It is easier for the Bidders to submit their prices. 	<ul style="list-style-type: none"> - The unit prices of each item are not recorded in the system. The system records only the total per each LOT. - Risk that Bidders will make

		mathematical errors in the Price Schedule.
Line item components feature	<ul style="list-style-type: none"> - All prices per each item are recorded in the system. - No room for mathematical errors. The system will calculate the prices based on the data (quantities and unit prices) input by Bidders. 	<ul style="list-style-type: none"> - It is more time consuming to create the bid event in the system. - Risk that bidders input the wrong quantity for the items composing each LOT.

Buyers must exercise their judgment to decide which method to use. It is recommended that the Line item component feature is used. However, if the LOTS are big and with a long list of items, the “Separate Price schedule” method may be used.

5.1.5 Create an RFP event

In the system, RFPs are treated in the same way as other types of processes. Difference is made only in how the financial information is provided. Bidders must submit their proposal as a PDF password protected document uploaded in the system. These are the steps that need to be followed:

1. Prepare the bidding document and all relevant sections. **IMPORTANT: Use the template modified for use with eTendering.**
2. Create the event in the system. 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.
3. It is important to emphasize to bidders that they must submit their financial proposal only as a password protected document.
4. Once technical evaluation is completed and signed and evaluation committee instructs the procurement office for which proposers the financial proposals must be opened, the procurement office requests formally the password for the financial proposal from these proposers.
5. The formal response with the password from the proposers is PDF scanned and uploaded in the document as a confidential document.
6. The financial proposals are then opened and shared with the evaluation committee.
7. Once the evaluation is completed and signed, a scanned copy is uploaded to the bid event in the system marking it 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 an attachment with a password. Different Country Offices 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.

5.1.6 Publish Procurement Notice

Once the event is approved by the manager, it is visible and accessible for bidders registered in the system. However, this does not replace the normal Procurement notice that must be done for each case. A Procurement notice must be announced in the same way as it is done if the case is not handled through eTendering. The text of the procurement notice is also the same but adding one paragraph explaining interested bidders that the case is handled through the eTendering system and that they need to register to be able to bid. Please find below a suggested text that you can add. Also, you must include the bidders manual and FAQ for suppliers document in the procurement notice as well.

Text:

Please note that this procurement process is being conducted through online tendering system of UNDP. Bidders who wish to submit an offer must register in the system in order to access the bidding document and submit a proposal. To register please visit 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 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.*

It is recommended to not upload the solicitation documents in the procurement notice in order to encourage bidders to register to the system and retrieve solicitation documents from there. During this process, they will subscribe for the specific event and will be able to receive notifications when any amendment is made in the event.

This will enable also buyers to be able to view interest and participation during the bidding period, and help make a decision if extension is required due to low participation.

If amendments are made to e.g. provide pre-bid meeting minutes, or other amendments, it is not necessary to amend the original Procurement Notices. However, **Procurement notices must be amended if the deadline is extended.**

5.2 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, you can access the event approval page directly by going to the “Worklist” and search for the approval routing tasks.

The screenshot displays the Atlas Finance Worklist interface. At the top, a blue header bar contains the Atlas Finance logo and a welcome message: "Welcome Arvis Vilcins, Your Atlas Finance Last Login Datetime : 11.Nov.2014 10:35:40 GMT". Below the header, a breadcrumb trail shows "Favorites | Main Menu > Worklist > Worklist". The main section is titled "Worklist" and indicates "Worklist for arvis.vilcins: Arvis Vilcins". A "Detail View" link is present. A "Worklist Filters" section shows a dropdown menu set to "Approval Routing" and a "Feed" button. Below this is a table of worklist items. The table has columns: From, Date From, Work Item, Worked By Activity, Priority, Link, and actions (Mark-Worked, Reassign). Two items are listed, both for "Roland Koxhaj" on "11/11/2014" and "14/11/2014", both for "Approval Routing" and "Approval Workflow", with a "2-Medium" priority. The "Link" column for the first item shows "Event Approval, 2083, Event ID 0000000145 is awaiting approval." and for the second item shows "Event Approval, 2091, Event ID 0000000146 is awaiting approval." A "Refresh" button is located at the bottom left of the interface.

From	Date From	Work Item	Worked By Activity	Priority	Link	Mark-Worked	Reassign
Roland Koxhaj	11/11/2014	Approval Routing	Approval Workflow	2-Medium	Event Approval, 2083, Event ID 0000000145 is awaiting approval.		
Roland Koxhaj	14/11/2014	Approval Routing	Approval Workflow	2-Medium	Event Approval, 2091, Event ID 0000000146 is awaiting approval.		

Click on “Approve” to approve the event, or “Deny” to send it back to event creator for making changes as necessary. Approver can include comments in the “Approval comment” box.

Yours sincerely,			
Event Type:	RFX	Start Date:	18/11/2014 05:26 EST
Entered By:		End Date:	09/12/2014 05:26 EST

▼ Review/Edit Approvers

Event Approval

▼ Approval Status: Pending

[View/Hide Comments](#)
[+ Start New Path](#)

Event Approval

Skipped

[Roland Koxhaj](#)
UN Event Approver
11/11/14 - 05:31

Pending

[Multiple Approvers](#)
UN Event Approver

Comments

Approval Comments

Approver can write comments which will be sent back to the event creator.

Approve

Deny

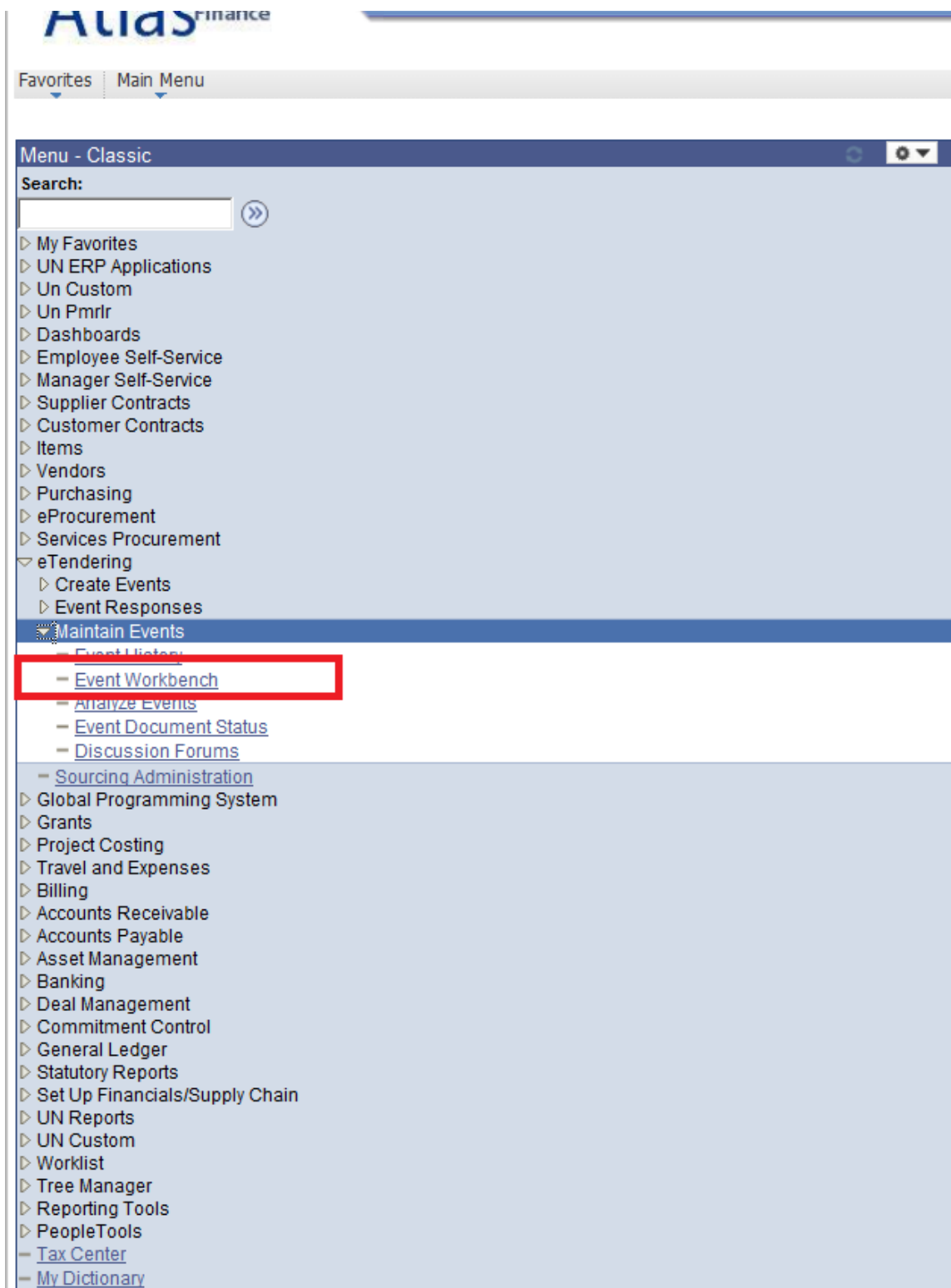
If event is approved, it becomes visible and accessible for bidders registered in the system.

If event is denied, buyer must post it again (after making changes as necessary). The system will send a new email to approver requesting approval.

5.3 MANAGING AN EVENT DURING SOLICITATION PROCESS

This section describes the actions that the buy may take during the bidding period, from the moment when the event is posted until the end date/time has passed and evaluation can commence.

Navigate to eTendering >>> Maintain Events >>> Event Workbench to conduct any of the actions related to managing an event.



All the events for all BUs will be listed in the Event Workbench. You can filter them using the available search criteria such as Event ID, event creator, etc.

[Favorites](#) | [Main Menu](#) > [eTendering](#) > [Maintain Events](#) > [Event Workbench](#)

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:
 Event Type: Item ID:
 Event Status: Item Description:
 Associated With Plan Plan Name

☐ Only show Events I created
☐ Use my search defaults

[Default Search Preferences](#)

Legend

Search Results Find | View 100 First 1-25 of 167 Last

Event ID	Name	Format	Type	Unit	Status
----------	------	--------	------	------	--------


You can take different actions depending on the status of each event. The Event Workbench legend lists the actions that are possible from this page:

- **Cancel.** Cancels an event. More explained below.
- **Approval status.** Checks who are the approvers for the event and if event has been approved.
- **Event History.** Checks the history of the event, e.g. the different versions created.
- **Analyze bids.** View and analyze bids received. More explained at the evaluation section.
- **New Version.** Creates new version. More explained below.
- **View collaboration, Collaboration available; Collaboration Checked out:** related to “Collaboration feature”. Not functional at the moment.
- **Bid History.** Reviews bidders participation during the solicitation period or at the evaluation stage.

5.3.1 Monitor Event

You can monitor an event to view on how many bidders are participating on the event, which bidders have submitted bids, what are the different versions created, who are the approvers, etc

View Bidder Participation

Click on “View Bid History”  button to view bidders participation to an event at any time.

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 17.Nov.2014

[Favorites](#) |
 [Main Menu](#) >
 [eTendering](#) >
 [Maintain Events](#) >
 Event Workbench

Event Bid History

Event ID	Event Name	Round	Version	Event Type	End Date	Status
UNDP1-0000000146	USER MANUAL EVENT	1	1	RFx	11/12/14 08:46 EST	Posted

[Refresh](#)

Event Participation Activity

Total Event Invitations: [4](#)
 Accepted Invitations: [3](#)
 Declined Invitations: [0](#)
 No Response: [1](#)

[Return to Event Workbench](#)

Click on the hyperlink number under “Event Participation Activity” section to see more details:

- Total Event Invitation will show bidders that were invited directly when the event was created, if they have accepted invitation, and if they have submitted a bid.
- Accepted invitation will show all bidders who have subscribed to the event by clicking on “Accept Invitation” button regardless of whether they were invited directly or not.
- Declined invitation will show the bidders who were invited directly but declined to participate in the event.
- No Response will show bidders who were invited by have not responded yet to the invitation.

In essence, the “accepted invitation” link will show all bidders participating in the event. **It is highly recommended that you check during the solicitation period that there is sufficient participation to ensure timely deadline extension if necessary.**

[Favorites](#) |
 [Main Menu](#) >
 [eTendering](#) >
 [Maintain Events](#) >
 Event Workbench

Event Bid History

Event ID	Event Name	Round	Version	Event Type	End Date	Status
UNDP1-0000000146	USER MANUAL EVENT	1	1	RFx	11/12/14 08:46 EST	Posted

[Refresh](#)

Event Participation Activity

Total Event Invitations: [4](#)
 Accepted Invitations: [3](#)
 Declined Invitations: [0](#)
 No Response: [1](#)


▼ Accepted Invitations

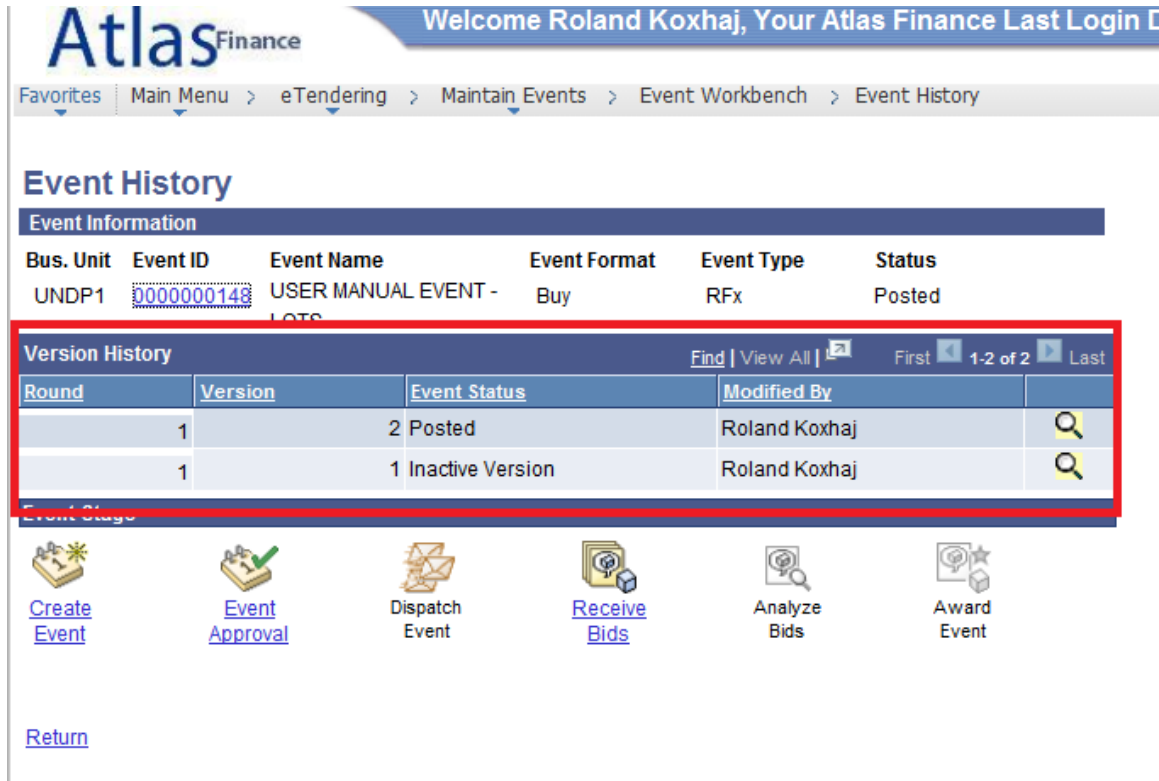
Bidder Name	Invited?	Bid Posted?
PSO TEST 1	Yes	Yes
PSO TEST 2Roland	Yes	Yes
PSO TEST 3	Yes	Yes

[Return to Event Workbench](#)

System will list all bidders who have subscribed to the event and if they have submitted a bid (Yes, or No) under “Bid Posted” column.

View Event History

Click on “View Event History” button () to view the history of the event such as the different versions created, creator/modifier, etc.





Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login D

[Favorites](#) | [Main Menu](#) > [eTendering](#) > [Maintain Events](#) > [Event Workbench](#) > [Event History](#)

Event History


Event Information					
Bus. Unit	Event ID	Event Name	Event Format	Event Type	Status
UNDP1	0000000148	USER MANUAL EVENT - LOTS	Buy	RFx	Posted

Version History				
Round	Version	Event Status	Modified By	
1	2	Posted	Roland Koxhaj	
1	1	Inactive Version	Roland Koxhaj	


[Return](#)

Event Stage

[Create Event](#) [Event Approval](#) [Dispatch Event](#) [Receive Bids](#) [Analyze Bids](#) [Award Event](#)

Click on  to view the exact information respective version.

View Approval Status

Click on “Approval Status”  to view who are the managers who can approve the event, who has approved it, any approval/denial comments made by the approver, etc.

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Date/Time: 17/11/14

[Favorites](#) | [Main Menu](#) > [eTendering](#) > [Maintain Events](#) > [Event Workbench](#)

Approval Status

Business Unit: UNDP1 Event ID: [0000000148](#) Round: 1 Version: 2 Event Format: Buy

Event Type:	RFX	Start Date:	16/11/2014 09:28 EST
Event Status:	Posted	End Date:	12/12/2014 09:28 EST
Event Name:	USER MANUAL EVENT - LOTS	Entered By:	roland.koxhaj
Descr:	LOT Event		

[Review/Edit Approvers](#)

Event Approval

Approval Status: Approved [View/Hide Comments](#) Click to view comments

Event Approval

Approved

[Arvis Vilcins](#)
UN Event Approver
17/11/14 - 03:42

Click to view approvers details.

Skipped


[Roland Koxhaj](#)
UN Event Approver
17/11/14 - 03:41

Comments

System at 17/11/14 - 03:41
Requester (roland.koxhaj) is approver on step number 1, path 1, stage 10, which has self-approval disabled! (236,1031)

[Return to Event Workbench](#)

5.3.2 Amend Event

You can make any changes to an existing event. Click on “Create New Version”  button. The system will create a new version which is based on the latest version that was posted. **Bidders will continue to see the original version until the new version has been posted and approved by the manager.**

Basic changes

You can change on the information and settings. The steps are the same as if you are creating a new event.

Audis Finance

[Favorites](#) |
 [Main Menu](#) >
 [eTendering](#) >
 [Maintain Events](#) >
 [Event Workbench](#) >
 [Event Details](#)

Modify an Event

Event Summary

Business Unit: UNDP1 Event ID: 0000000146 Round: 1 **Version: 2** Event Format: Buy

<p>Event Type: RFX</p> <p>Event Status: Open</p> <p>*Event Name: <input type="text" value="USER MANUAL EVENT"/></p> <p>Descr: <div style="border: 1px solid #ccc; padding: 5px;"> Section 1. Letter of Invitation Enter a new paragraph highlighting the changes made. </div></p>	<p>Preview Date: <input type="text" value="14/11/2014 08:46 EST"/></p> <p>*Start Date: <input type="text" value="14/11/2014 08:46 EST"/></p> <p>*End Date: <input type="text" value="11/12/2014 08:46 EST"/></p> <p>Copy From: <input type="text"/> <input type="button" value="Go"/></p>
---	---

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](#)
[Event Header Bid Factors](#)

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

[* Line Items](#) [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](#)

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.

Once the new version is approved, bidders will be able to see it in the system. Automatic email notifications will be sent to the following bidders:

- Bidders who were invited directly;
- Bidders who have subscribed to the event by clicking on the “Accept Invitation” button;
- Bidders who have already submitted a bid for the previous version.

Below are some practical considerations when creating a new version.

1. Always enter a new paragraph on top of the Description Box to highlight to bidders the changes made to the event and what bidders are supposed to do. For example:

“This is amendment No 1 of this ITB. Changes included in this amendment are:

1. Bidding deadline extended;
2. Minutes of pre-bid meeting uploaded;
3. Changes/clarifications to the TORs.

Bidders must make sure to read and understand the amendments made and edit their bid content as necessary.

2. Bidders who were invited in the original version, or who had subscribed to the event, will be added automatically in the “Bidder Invitation” section I the new version, as shown below:

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 17.Nov.2014 10:3

Favorites | Main Menu > eTendering > Maintain Events > Event Workbench > Event Details

Modify an Event

Invite Bidders

Business Unit: UNDP1 Event ID: 0000000146 Round: 1 Version: 2 Event Format: Buy Event Type: RFX

☒ Public Event

Select	Bidder ID	Bidder Type	Name	*Dispatch Method	Renotify		
1 <input type="checkbox"/>	0000001387	Bidder	PSO TEST 1	Email	<input checked="" type="checkbox"/>		
2 <input type="checkbox"/>	0000001388	Bidder	Roland PSO TEST 2	Email	<input checked="" type="checkbox"/>		
3 <input type="checkbox"/>	0000001389	Bidder	PSO TEST 3	Email	<input checked="" type="checkbox"/>		
4 <input type="checkbox"/>	0000001390	Bidder	PSO TEST 4	Email	<input checked="" type="checkbox"/>		
5 <input type="checkbox"/>	PUBLIC_AUC	Public	This is a Public Event	Email	<input type="checkbox"/>		

[Search for Bidders](#) [Save Bidders as Group](#)

[Save Event Changes](#)

GoTo:

[Return to Event Overview](#)

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

3. **Never create a new version if the deadline (End date) of the previous has passed. In this scenario, you must create a new event.**
4. Do not create a new version if the previous version is pending approval by the manager. If you want to make changes to the event, but system does not allow you because you have posted it and is pending approval by the manager, ask the manager to not approve it but deny. After that you can make changes to the original version.
5. Do not change line items or bid factors unless it is really necessary. If you need to change line items or bid factors, follow the steps outlined below under “Change line items and bid factors” section.

6. System will automatically forward/match bids received for the original version to the new version. Exception is made when line items or bid factors have been edited. More explained below.

Edit Line items and bid factors

If a bidder has already submitted a bid for the original version and then after that UNDP creates a new version, system will automatically match the bid submitted to the new version. However, the line items or bid factors have been edited, system cannot match the bid because substantial changes to the event have been made.

Editing line items and bid factors is strongly discouraged. However, if changed are necessary, follow the instructions below.

Check the bid history page if any of the bidders has already submitted a bid. If not, you can make the changes, provided you do them in a swift way so event is modified and approved before any bidder submits a bid.

If any of the bidders has submitted a bid, it is highly recommended to not modify line items or bid factors. If proper steps are followed by both buyer and bidders, system will still allow changes in the line items and bid factors. However, depending on the type of changes made, buyers may not be able to view any of the bids when the event is closed. To view bids, manual intervention from the IT technical team will be necessary.

Below are some general steps that need to be followed for changing line items or bid factors. **However, you must contact PSO for further guidance and detailed instructions if changing the line items or bid factors is necessary.**

Bidder must submit a new bid to match with the new version. These are the steps you must follow when you create a new version editing line items or bid factors:

1. Click on “Create New version” from Event Workbench.
2. Click on line items or bid factors as relevant.
3. Make the necessary changes. If you delete a line item, you must adjust the weighting so the total is 100% again.

Atlas

Favorites | Main Menu > eTendering > Maintain Events > Event Workbench > Event Details

Modify an Event

Line Items

Business Unit: UNDP1 Event ID: 0000000146 Round: 1 Version: 2 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Go

Line Items Personalize | Find | View All | First 1-2 of 2 Last

Basic Definition Advanced Definition

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1	24112458E	G) Cardboard Recyc booth Lam	GVOTINGBOOTH	EA	10.0000	250.0000	\$2500.00	50.00000
2		Air Freight to	713000	LS	1.0000	50000.0000	\$50000.00	50.00000

Event Total: 52500.0000 USD Line Weighting Total: 100 % Remaining Weight: 0 %

Deleting Line item 2

GoTo: Go

[< Return to Event Overview](#)

Save Event Changes

[Return to Search](#) [Refresh](#)

Delete Confirmation

Delete current/selected rows from this page? The delete will occur when the transaction is saved.

OK Cancel

[Add](#) [Update/Display](#)

4. Go to “Event Settings and Options” and select “Alternate bids allowed”

Atlas Finance

Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 17.Nov.2014 10:30

Favorites | Main Menu > eTendering > Maintain Events > Event Workbench > Event Details

Modify an Event

Event Settings and Options

Business Unit: UNDP1 Event ID: 0000000146 Round: 1 Version: 2 Event Format: Buy Event Type: RFX

☒ Allow Bidder XML Downloads

☒ Bid Required On All Lines

☒ **Alternate Bids Allowed**

☒ Allow Edit of Posted Bids

Round/Version Display:

☒ Sealed Event

☒ Display Bid Factor Weightings

Factor Event Score Into:

Start Price:

Header Weighting:

GoTo: Go

Save Event Changes

[< Return to Event Overview](#)

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)


5. Instruct bidders to submit a new bid. You can enter a paragraph in the description box, include it in any of the attached documents, etc. A sample instruction text is included below@
 “Line Items have been changed. If you have already submitted a bid for the original version, it is not valid anymore. You must submit a new bid.”
6. Post the event for the manager to approve.

Handling attachments when creating new version

Technically, when creating a new version, the attachments can be handled in the same way as when the event is created. However, practically you may choose the method described below.

Untick the “Include in Notifications” box for all attachments that were in the original version. Tick the “Include in Notifications” box only for attachments that were added with the new version. This way the system will attach only the “ticked” documents with the automatic notification email sent to bidders. **In any case, keep “Display to Bidder” box ticked for all documents that you want to show to bidders.**

5.3.3 Cancel an event

Click on “Cancel Event”  from event workbench to cancel an ongoing event. System will prompt with a new “Cancel Event” button as shown below and request a further confirmation before event is cancelled.

Cancel Event for: Roland Koxhaj

Event Information							
Business Unit	Event ID	Event Name	Round	Version	Format	Status	Bids Received
UNDP1	0000000147	Open ITB - Simple Version - V1	1	1	Buy	Open	No

Line Information						
Line	Category	Item ID	Item Description	Quantity	UOM	Extended Price
1	633000	633000	TRAVEL	1	EA	527.76
2	633000	633000	TRAVEL	4	EA	2352.00

Cancel Event

[Return to Event Workbench](#)

Once the event is cancelled, it cannot be re-activated again. An email notification will be sent to all subscribed bidders informing them the event is cancelled.

6 EVALUATION AND AWARD

This section describes the process from the moment that the bidding is closed until a contract has been issued.

6.1 BID OPENING PROCEDURES

The main purpose of the Bid Opening is to ensure the integrity of the process and bids are submitted in time and properly recorded.

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

The eTendering system achieves the main purpose of the Bid Opening Process and an ad-hoc Bid Opening Committee is no longer required. However certain steps, as described in this document, need to be followed by the Procurement practitioner to ensure full compliance with POPP guidelines.


In any case, to ensure the transparency of the process, UNDP may also conduct a public bid opening where bids are opened and prices are publicly read to all participating bidders.

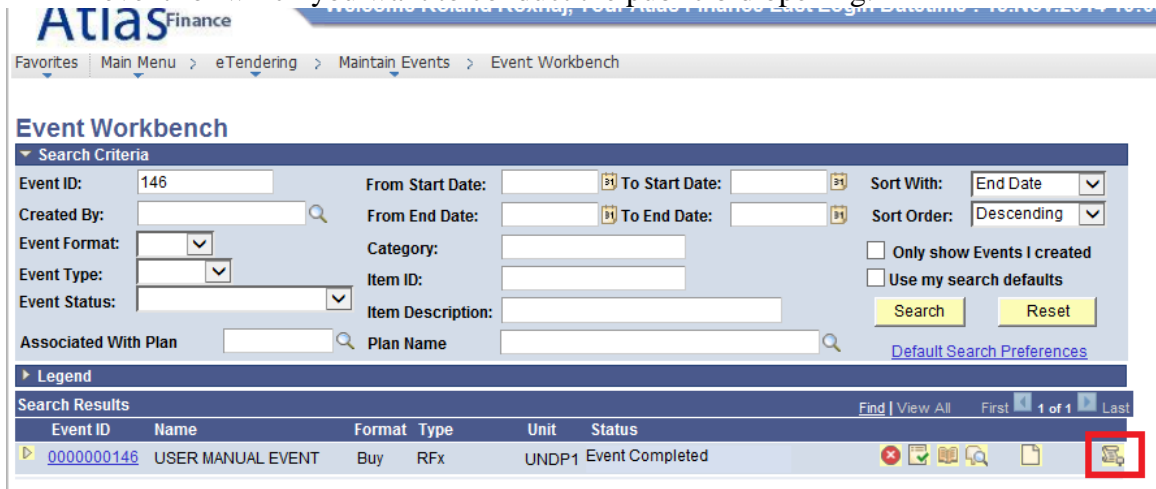
6.1.1 Public Bid opening

In order to ensure the transparency of the process, a Public Bid opening event with the participation of bidders who have submitted a bid is necessary. The procurement office will share the most relevant information such as companies who have participated and their respective total bid price by connecting the computer on a screen and show the relevant information directly from the system.

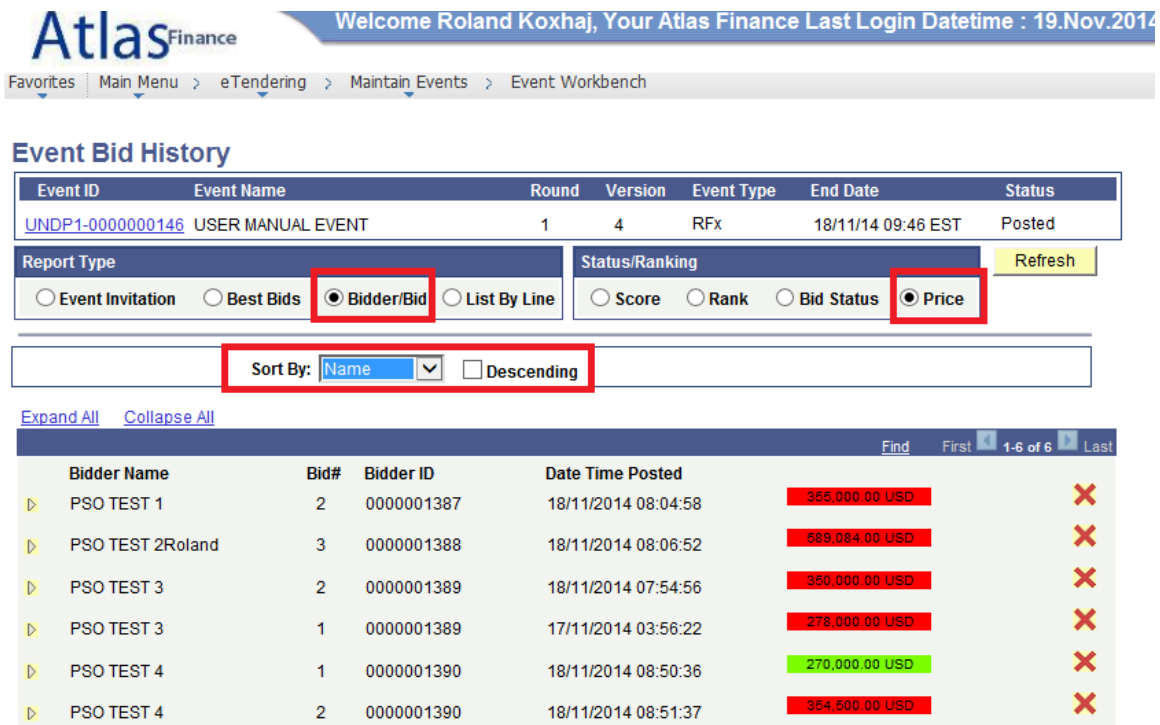
Procurement office must first ensure that the system is functioning properly before initiating a public bid opening event with bidders, to avoid any inconvenience.

To show the information for public bid opening:

1. Go to Event Workbench and click on “View Bid History” button  beside the event for which you want to conduct the public bid opening.



2. In the “Report type” section select “Bidder/Bid”. In “Status/Ranking” section select “Price”.



Event ID	Event Name	Round	Version	Event Type	End Date	Status
UNDP1-0000000146	USER MANUAL EVENT	1	4	RFX	18/11/14 09:46 EST	Posted

Report Type				Status/Ranking		Refresh
<input type="radio"/> Event Invitation	<input type="radio"/> Best Bids	<input checked="" type="radio"/> Bidder/Bid	<input type="radio"/> List By Line	<input type="radio"/> Score	<input type="radio"/> Rank	<input type="radio"/> Bid Status
				<input type="radio"/> Price		

Sort By:		Descending
Name		<input type="checkbox"/>

Bidder Name	Bid#	Bidder ID	Date Time Posted	Bid Amount	Status
PSO TEST 1	2	0000001387	18/11/2014 08:04:58	355,000.00 USD	X
PSO TEST 2Roland	3	0000001388	18/11/2014 08:06:52	589,084.00 USD	X
PSO TEST 3	2	0000001389	18/11/2014 07:54:56	350,000.00 USD	X
PSO TEST 3	1	0000001389	17/11/2014 03:56:22	278,000.00 USD	X
PSO TEST 4	1	0000001390	18/11/2014 08:50:36	270,000.00 USD	X
PSO TEST 4	2	0000001390	18/11/2014 08:51:37	354,500.00 USD	X

[Return to Event Workbench](#)

You can sort the bids by company name.

Expanding the arrow besides each bidder will show the line item prices. Do not expand as we should show only the total price of the bid. However, in LOT events, where one line items in the eTendering system corresponds to one LOT (please refer to user guides for more details on creating LOT events), expand the arrow in order to show the bid price per each LOT for each Bidder.


6.1.2 Share Bids to the Evaluation Team

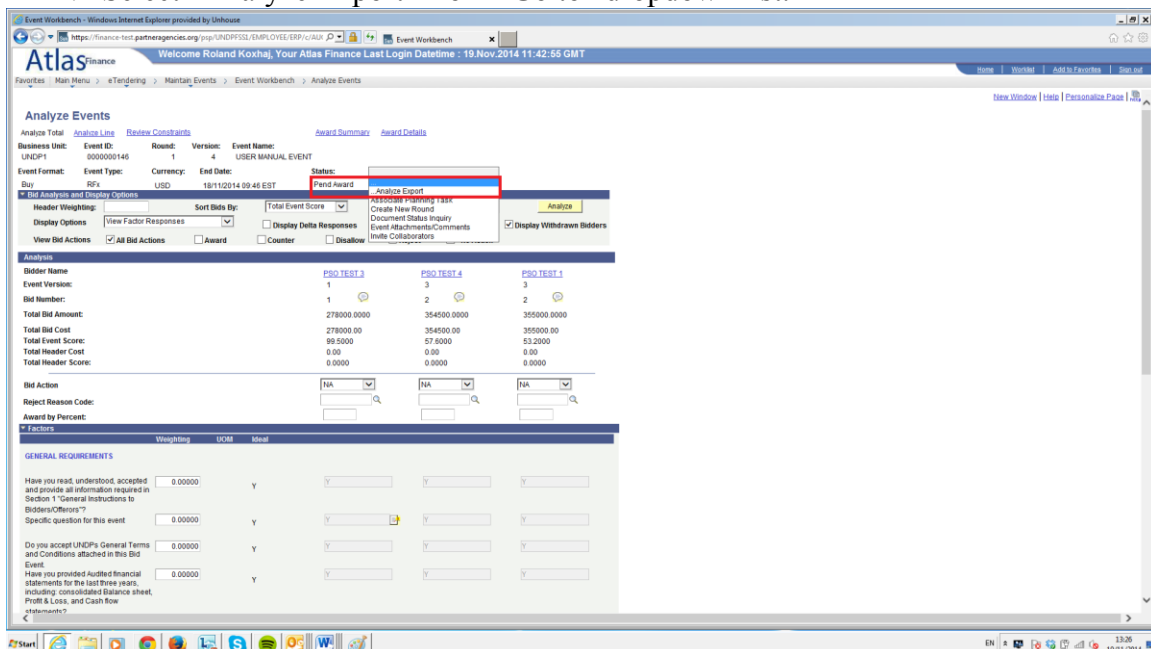
As explained in the section on system profiles, only buyers have access to bids received within their respective BU. However, the evaluation team may be also composed of individuals that are not buyers, hence, would not have direct access to the bids received in the system. It is the responsibility of the procurement officer managing the case to provide to Evaluation Team members all the information submitted by bidders.

The bid responses can be categorized in 3 groups: 1) responses to the questions (bid factors) setup in the system; 2) Price information; and 3) supporting documentation (attachments) uploaded by bidders directly in the system. Buyer can generate and send a report directly to the evaluation team members. This report in excel will contain responses to bid factors and price information (categories 1 and 2).

Step 1 Share Bid Analysis export

Follow these steps to generate this report:

1. Click on “Analyze Bids”  from event workbench.
2. Select “Analyze Export” from “Go to” dropdown list.



Analyze Events

Business Unit: UNDP1 | Event ID: 000000146 | Round: 1 | Version: 4 | Event Name: USER MANUAL EVENT | Status: Pending Award

Go to: Analyze Bids (selected) | Analyze Export | Analyze

	PSO TEST 3	PSO TEST 4	PSO TEST 1
Bidder Name			
Event Version	1	3	3
Bid Number	1	2	2
Total Bid Amount	278000.0000	354500.0000	355000.0000
Total Bid Cost	278000.00	354500.00	355000.00
Total Event Score	58.5000	57.6000	53.2000
Total Header Cost	0.00	0.00	0.00
Total Header Score	0.0000	0.0000	0.0000

GENERAL REQUIREMENTS

Requirement	Y/N	Y	N	Y	N
Have you read, understood, accepted and provide all information required in Section "General Instructions to Bidders/Officers"?	Y				
Specific question for this event	Y				
Do you accept UNDP's General Terms and Conditions attached in this Bid Event?	Y				
Have you provided Audited financial statements for the last three years, including consolidated Balance sheet, Profit & Loss, and Cash flow statements?	Y				

3. Add evaluation team members as file recipient names. You can add only ATLAS users. Click on “Create analysis export”. An XML file will be sent via email to all recipients.

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Date

[Favorites](#) | [Main Menu](#) > [eTendering](#) > [Maintain Events](#) > [Event Workbench](#) > [Analyze Events](#)

Bid Analysis Export

Business Unit: UNDP1 **Event ID:** 0000000146 **Round:** 1 **Version:** 4 **Event Name:** USER MANUAL EVENT
Event Format: Buy **Event Type:** RFx **Currency:** USD **Finish:** 18/11/14 09:46 EST **Status:** Pend Award

Analysis Export File Recipients				
	*Name	*Email Address	Notify	
1	Roland Koxhaj	roland.koxhaj@undp.org	<input checked="" type="checkbox"/>	+ -
2	Madhu Vegunta	madhu.vegunta@undp.org	<input checked="" type="checkbox"/>	+ -

Filter Bids

Select the bids you want to include in your Analysis Export file.

[Select All](#) [Deselect All](#)

☒ Award ☒ Counter ☒ Disallow ☒ Reject ☒ <No Action>
☒ Display Disqualified Bids ☒ Display Withdrawn Bids

Filter Bid Responses

☐ Display Delta Responses

[Create Analysis Export](#) [Return to Analyze Event](#)

To create a bid analysis export:

1. Enter the email addresses of those you would like to receive the export.
2. Click on the Create Analysis Export button. At this point the Analyze Events pages will be saved, and a process will be kicked off to create the Bid Analysis Export file and email the recipients listed above.
3. Once the email is received, open the XML attachment in Microsoft Excel.

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#)

To open the XML file, follow these steps:


- Save the XML file in a folder.
- Open Excel application.
- Open the file from the File/open menu from Excel.

Do not open the XML file by double clicking on it from the folder.

Step 2 Download and share attachments

Click on the attachments link in all 3 possible locations, which are: a) general comments and attachments; b) Bid Factor answers; and c) line item level.

- Download attachments in “General Comments and Attachments” section:

1. Click on “Header Comments” button  underneath bidders name.

Favorites | Main Menu > eTendering > Maintain Events > Event Workbench > Analyze Events

Event Format: Buy Event Type: RFX Currency: USD End Date: 18/11/2014 09:46 EST Status: Pend Award Go To: ...

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

	PSO TEST 3	PSO TEST 4	PSO TEST 1
Bidder Name	1	3	3
Event Version:	1	2	2
Bid Number:	1	2	2
Total Bid Amount:	278000.0000	354500.0000	355000.0000
Total Bid Cost	278000.00	354500.00	355000.00
Total Event Score:	60.1000	48.7000	48.6000
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
GENERAL REQUIREMENTS			
Have you read, understood, accepted and provide all information required in Section 1 "General Instructions to Bidders/Offerors"?	0.00000	Y	Y Y Y
Specific question for this event	0.00000	Y	Y Y Y
Do you accept UNDPs General Terms and Conditions attached in this Bid Event.	0.00000	Y	Y Y Y
Have you provided Audited financial statements for the last three years, including: consolidated Balance sheet, Profit & Loss, and Cash flow	0.00000	Y	Y Y Y

2. Download and save each document by clicking on “View Attached File”  buttons for each file.

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Las

Favorites | Main Menu > eTendering > Maintain Events > Event Workbench > Analyze Events

Response Header Comments/Attachments

Business Unit: UNDP1 Event ID: 0000000146

Comments


Comments:

Attachments		Personalize	Find	First	1-2 of 2	Last
Attached File	Attachment Description					
Accept_invitation_1.PNG						
USER_MANUAL_EVENT.pdf	Bid Details					

Document uploaded by Bidder

[Return](#) **File generated by system containing bidders responses in PDF format.**

➤ Download attachments in “Bid Factors”

1. Click on “Comments”  button in any of the bid factors. All documents uploaded by bidders for any of the bid factors will be shown in the same place, regardless of which bid factor you open.

Atlas Finance
Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 24.Nov.2014 13:29:04 GMT

Event Format: Event type: Currency: End Date: Status: Go to:

Buy RFX USD 18/11/2014 09:46 EST 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

	PSO TEST 3	PSO TEST 4	PSO TEST 1
Bidder Name	1	3	3
Event Version:	1	2	2
Bid Number:	278000.0000	354500.0000	355000.0000
Total Bid Amount:	278000.00	354500.00	355000.00
Total Bid Cost	60.1000	48.7000	48.6000
Total Event Score:	0.00	0.00	0.00
Total Header Cost	0.0000	0.0000	0.0000
Total Header Score:			
Bid Action	NA	NA	NA
Reject Reason Code:			
Award by Percent:			

Factors

	Weighting	UOM	Ideal
GENERAL REQUIREMENTS			
Have you read, understood, accepted and provide all information required in Section 1 "General Instructions to Bidders/Offerors"?	0.00000	Y	Y
Specific question for this event	0.00000	Y	Y
Do you accept UNDPs General Terms and Conditions attached in this Bid Event	0.00000	Y	Y
Have you provided Audited financial statements for the last three years, including: consolidated Balance sheet, Profit & Loss, and Cash flow statements?	0.00000	Y	Y
Have you provided all information regarding any past and current litigation during the last five (5) years, in which	0.00000		Bid 3 (2nd attempt fa

2. Open and save each document.

➤ Download attachments in "Bid Factors"

1. Click on "Analyze Line" tab on top.

2. Click on "Line Comments" button underneath each bidder.

3. Download and save each document.

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 24.Nov.2014 13:29:04 GMT

avorites | Main Menu > eTendering > Maintain Events > Event Workbench > Analyze Events

Analyze Events

[Analyze Total](#) [Analyze Line](#) [Review Constraints](#) [Award Summary](#) [Award Details](#)

Business Unit: UNDP1 Event ID: 000000146 Round: 1 Version: 4 Event Name: USER MANUAL EVENT

Event Format: Buy Event Type: RFX Currency: USD End Date: 18/11/2014 09:46 EST Status: Pend Award Go To: [dropdown]

Select Line: [dropdown] 1 of 2

Line Number: 1 Requested Quantity: 10.0000 UOM: EA Start Price: 250.00000

Item ID: 24112458E Item Description: [GJ Cardboard Recyc booth Lam](#) Weighting: 50.00000

▼ Bid Analysis and Display Options

Analyze Qty: 10.0000 Sort Bids By: [dropdown] Sort Order: Descending [dropdown] [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

	PSO TEST 3	PSO TEST 4	PSO TEST 1
Bidder Name:	1	3	3
Event Version:	1	2	2
Bid Number:	10.0000	10.0000	10.0000
Bid Quantity:	0.0000	0.0000	0.0000
Minimum Bid Quantity:	28000.0000	34500.0000	25000.0000
Total Bid Amount:	28000.00	34500.00	25000.00
Total Bid Cost:	94.6700	92.7600	95.5500
Total Line Score:			
Bid Action:	NA	NA	NA
Reject Reason Code:	[input]	[input]	[input]
Award by Percent:	[input]	[input]	[input]
Award Quantity:	[input]	[input]	[input]

▼ Factors

Add/Edit Bid Factors	Weighting	UOM	Ideal
Please indicate the FCA price per unit.	100.00000	0	

Recalculate [left arrow] [right arrow] [right arrow] [right arrow]

Click on > to view rest of bids.

6.1.3 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 how the Country Office is doing now that proposals are received via email.

The system may provide an additional option for office that may choose to store the passwords in the system as document that can be uploaded at the evaluation stage and marked as confidential. Please contact PSO for more guidance if you choose to follow this option.

6.2 EVALUATION PROCESS

This section describes the processes and steps that must be taken for the evaluation and award of the contract, starting from the evaluation of bids till issuing the contract or Purchase Order.

Currently, the evaluation functionality of the eTendering system is used to a limited extend only. With future planned enhancements, and more user trainings, the system evaluation functionality can be utilized to a greater extend.

Country Office that wish to use the evaluation functionality fully can contact PSO for a customized tailor made training.

6.2.1 Evaluation of Offers

The evaluation of the offers will be conducted outside the system. 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.

6.2.2 Review and Approvals

Review and approval process (CAP, RACP, and ACP) will be managed outside the system through the ACP online system.

6.3 REFLECT EVALUATION IN THE SYSTEM


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

6.3.1 Identify awarded and non-awarded bidders

In general, the verdict for any of the offers received may fall under any of the below categories:

- Awarded – bid that are eventually awarded to a contract;
- Rejected – bids that are not responsive or compliant and therefore rejected;
- Not awarded (NA) – bids that are compliant but are not awarded due to price.

Note: There are 2 additional actions that can be chosen in the system (Disallow and counter) which are for different purposes and should not be used.

To reflect the outcome of the evaluation process in the system, navigate to eTendering >> Maintain Event >> Analyze Events and search for the event. Alternatively, click on  button from the event workbench page.

The following screen will show all bids. Specify for each bid if it is awarded, rejected, or not awarded (NA), as shown in the screenshot below:

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 15.Dec.2014 16:24:00 GMT

favorites | Main Menu > eTendering > Maintain Events > Event Workbench > Analyze Events

Analyze Events

Analyze Total [Analyze Line](#) [Review Constraints](#) [Award Summary](#) [Award Details](#)

Business Unit: AFG10 Event ID: 0000000165 Round: 1 Version: 2 Event Name: USER GUIDE EVENT - PART 2

Event Format: Buy Event Type: RFx Currency: USD End Date: 15/12/2014 09:45 EST Status: Pend Award Go To:

Bid Analysis and Display Options

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

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	PSO TEST 1	PSO TEST 3	PSO TEST 4	
Event Version:	1	1	1	
Bid Number:	1	1	1	
Total Bid Amount:	1100.0000	11000.0000	110000.0000	
Total Bid Cost	1100.00	11000.00	110000.00	
Total Event Score:	100.0000	95.3000	48.0000	
Total Header Cost	0.00	0.00	0.00	
Total Header Score:	0.0000	0.0000	0.0000	
Bid Action	<input type="text"/> Reject	<input type="text"/> Award	<input type="text"/> NA	
Reject Reason Code:	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Award by Percent:	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Factors

In the case of split awards, select “Award” for all bidders that will be awarded with a contract.

6.3.2 Specify awarded quantities

1. Click on “award Summary” tab and specify the quantities to be awarded for each line, and then save.

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 15.Dec.2014 16:24:00 GMT

[Favorites](#) | [Main Menu](#) > [eTendering](#) > [Maintain Events](#) > [Event Workbench](#) > [Analyze Events](#)

Analyze Events

[Analyze Total](#) | [Analyze Line](#) | [Review Constraints](#) | **[Award Summary](#)** | [Award Details](#)

Business Unit: AFG10 **Event ID:** 0000000165 **Round:** 1 **Version:** 2 **Event Name:** USER GUIDE EVENT - PART 2
Event Format: Buy **Event Type:** RFx **Currency:** USD **End Date:** 15/12/2014 09:45 EST **Status:** Pend Award **Go To:**

Line	Item ID	Description	Requested Qty	Event Price	Extended Amount	Award Quantity	Award Amount	Quantity Remaining	Line Status										
1	24112458E	G) Cardboard Recyc booth Lam	10.0000	250.000000	2500.0000	5.0000	5000.0000	5.0000	<input type="text"/>										
<table border="1"> <thead> <tr> <th>Select</th> <th>Name</th> <th>Awarded Qty</th> <th>Total Line Amount</th> <th>Extended Amount</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>PSO TEST 3</td> <td>5.0000</td> <td>1000.00000</td> <td>5000.0000</td> </tr> </tbody> </table>										Select	Name	Awarded Qty	Total Line Amount	Extended Amount	<input type="checkbox"/>	PSO TEST 3	5.0000	1000.00000	5000.0000
Select	Name	Awarded Qty	Total Line Amount	Extended Amount															
<input type="checkbox"/>	PSO TEST 3	5.0000	1000.00000	5000.0000															
2		Air Freight	1.0000	250000.000000	250000.0000	1.0000	1000.0000	0.0000	<input type="text"/>										
<table border="1"> <thead> <tr> <th>Select</th> <th>Name</th> <th>Awarded Qty</th> <th>Total Line Amount</th> <th>Extended Amount</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>PSO TEST 3</td> <td>1.0000</td> <td>1000.00000</td> <td>1000.0000</td> </tr> </tbody> </table>										Select	Name	Awarded Qty	Total Line Amount	Extended Amount	<input type="checkbox"/>	PSO TEST 3	1.0000	1000.00000	1000.0000
Select	Name	Awarded Qty	Total Line Amount	Extended Amount															
<input type="checkbox"/>	PSO TEST 3	1.0000	1000.00000	1000.0000															

[Add Award for Selected Bidder](#) [Schedule Defaults](#)

Event Award Summary:		Total Awarded Qty	Total Awarded Price	Quantity Remaining
Recalculate		6.0000	6000.0000	5.0000

[Save](#) | [Return to Search](#) | [Notify](#) | [Refresh](#)

[Analyze Total](#) | [Analyze Line](#) | [Review Constraints](#) | [Award Summary](#) | [Award Details](#)

- You can award less than the event quantity. In this case the remaining quantity can be awarded to a new PO.
 - You cannot award more than the event quantity. However, you can increase the quantity at the PO page (explained below).
 - You can split quantities of each line, or award different lines to different bidders. To split award to more than one bidder, you first must select “award” action to bidders that will be awarded.
2. Go back to “Analyze total” tab and select “Award” for another bidder, then save.
 3. Go back to “Award Summary” tab. The second bidder will be added to each line.

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 15.Dec.2014 16:24:00 GMT

[Favorites](#) |
 [Main Menu](#) |
 [eTendering](#) |
 [Maintain Events](#) |
 [Event Workbench](#) |
 [Analyze Events](#)

Analyze Events

[Analyze Total](#) |
 [Analyze Line](#) |
 [Review Constraints](#) |
 [Award Summary](#) |
 [Award Details](#)

Business Unit: AFG10
 Event ID: 0000000165
 Round: 1
 Version: 2
 Event Name: USER GUIDE EVENT - PART 2

Event Format: Buy
 Event Type: RFx
 Currency: USD
 End Date: 15/12/2014 09:45 EST
 Status: Pend Award
 Go To:

Line	Item ID	Description	Requested Qty	Event Price	Extended Amount	Award Quantity	Award Amount	Quantity Remaining	Line Status
1	24112458E	G) Cardboard Recyc booth Lam	10.0000	250.000000	2500.0000	5.0000	5000.0000	5.0000	<input type="text"/>
	<input type="checkbox"/>	PSO TEST 3	<input type="text"/>		1000.00000	5000.0000			
	<input type="checkbox"/>	PSO TEST 4	<input type="text"/>		10000.00000	0.0000			
2		Air Freight	1.0000	250000.000000	250000.0000	1.0000	1000.0000	0.0000	<input type="text"/>
	<input type="checkbox"/>	PSO TEST 3	<input type="text"/>		1000.00000	1000.0000			
	<input type="checkbox"/>	PSO TEST 4	<input type="text"/>		10000.00000	0.0000			

[Add Award for Selected Bidder](#) |
 [Schedule Defaults](#)

Event Award Summary:		Total Awarded Qty	Total Awarded Price	Quantity Remaining
<input type="button" value="Recalculate"/>		6.0000	6000.0000	5.0000

|
 |
 |

[Analyze Total](#) |
 [Analyze Line](#) |
 [Review Constraints](#) |
 [Award Summary](#) |
 [Award Details](#)

6.4 CREATE PURCHASE ORDER

Once you have determined bidder(s) that will awarded with a contract and for what quantity, you are ready to issue the contract.

Once the contract is created, the system will send automatic notifications to 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.

6.4.1 Check for duplicate vendor

The system can automatically create a vendor from the bidder account details (section 6.4.3). However, before creating a new vendor, check if bidder already exists in the vendor database for your BU in order to avoid vendor duplicates.

The process for checking the vendor database is the same as when creating a PO from a procurement process that has not been managed through eTendering. However, the eTendering system can facilitate this process.

Click on “award Details” tab. Select BU where you want to create the PO. System allows you to create the PO in the BU where event was created, or where the Requisition that was copied to the PO was raised.

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 15.Dec.2014 16:24:00 GMT

Favorites | Main Menu > eTendering > Maintain Events > Event Workbench > Analyze Events

Analyze Events

[Analyze Total](#) | [Analyze Line](#) | [Review Constraints](#) | [Award Summary](#) | [Award Details](#)

Business Unit: AFG10 | Event ID: 0000000165 | Round: 1 | Version: 2 | Event Name: USER GUIDE EVENT - PART 2

Event Format: Buy | Event Type: RFx | Currency: USD | End Date: 15/12/2014 09:45 EST | Status: Pend Award | Go To: ...

▼ Show Award Details to Bidders

☒ Display bids | ☒ Display all bids | ☐ Display bid scores | ☐ Display bid's total bid price | ☒ Display factors

Award Details

First 1 of 2 Last

Bidder Name: [PSO TEST 4](#) | Bidder Type: Bidder | Buyer: roland.koxhaj

Award Type: Purchase Order | Award Currency: Event | USD | Terms: ...

PO Business Unit: [AFG10](#)

Award Number: 1 | Total Award: 50000.0000

Award Lines

Line	Item ID	Vndr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price
1	24112458E	<input checked="" type="checkbox"/>	G) Cardboard Recyc booth Lam	EA	5.0000	10000.0000	50000.0000

[Post Award](#)

[Save](#) | [Return to Search](#) | [Notify](#) | [Refresh](#)

[Analyze Total](#) | [Analyze Line](#) | [Review Constraints](#) | [Award Summary](#) | [Award Details](#)

If “Post Award” button shows, it means that the bidder is already linked to a vendor in the database and you can proceed to creating the PO. Go to section 6.4.4 for next steps.

Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 15.Dec.2014 16:24:00 GMT

[Favorites](#) | [Main Menu](#) > [eTendering](#) > [Maintain Events](#) > [Event Workbench](#) > [Analyze Events](#)

Analyze Events

[Analyze Total](#) | [Analyze Line](#) | [Review Constraints](#) | [Award Summary](#) | [Award Details](#)

Business Unit: AFG10 **Event ID:** 0000000165 **Round:** 1 **Version:** 2 **Event Name:** USER GUIDE EVENT - PART 2

Event Format: Buy **Event Type:** RFx **Currency:** USD **End Date:** 15/12/2014 09:45 EST **Status:** Pend Award **Go To:** ...

▼ Show Award Details to Bidders

☒ Display bids
 ☒ Display all bids
 ☐ Display bid scores
 ☐ Display bid's total bid price
 ☒ Display factors

Award Details First 1 of 2 Last

Bidder Name: [PSO TEST 3](#) **Bidder Type:** Bidder **Buyer:** roland.koxhaj

Award Type: Purchase Order **Award Currency:** Event USD **Terms:**

PO Business Unit: [AFG10](#)

Award Number: 1 **Total Award:** 6000.0000

Line	Item ID	Vndr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price
1	24112458E	<input checked="" type="checkbox"/>	GJ Cardboard Recyc booth Lam	EA	5.0000	1000.0000	5000.0000
2		<input checked="" type="checkbox"/>	Air Freight	LS	1.0000	1000.0000	1000.0000

[Create Vendor](#)

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If system shows the “Create vendor” tab, it means that that particular bidder is not linked to a vendor in that specific BU. However, that does not mean that the company is not registered as a vendor in the system. Company could have been registered as a vendor prior to eTendering system being used by the office.

In this case, check if that company exists in the vendor database.

- If company exists as a vendor in the database, continue to section 6.4.2 to link the vendor account to the bidder account.
- If company does not exist as a vendor in the database, continue to section 6.3.3 to create a new vendor from the bidder account.

6.4.2 Link vendor to bidder

1. Click on the Bidder Name hyperlink and note down the bidder ID from.

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Bidder Information

Bidder ID: 0000001389 **ShortName:** PSO TEST 3
Name: PSO TEST 3
Location: MAIN

Details		
Name:	Roland PSO TEST 31	
Title:		Prefix:
Country:	DNK Denmark	Phone: 65651465465
Address 1:	marmorvej	Ext:
Address 2:		Prefix:
Address 3:		Fax:
Address 4:		
City:	Copenhagen	
County:		Postal:
State:		
URLID:		View Internet Address
Email ID:	roland.koxhaj@undp.org	

2. Open Add/Update vendor and find the vendor related to the company/bidder.
Open "Custom" tab and write down the bidder ID number in "Bidder ID" field and save.

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User Definable Vendor Fields

SetID: UNDP1

Vendor: 0000009517 Short Vendor Name: ROLAND&CO-001 Name: ROLAND & CO CRAFT CAFE

Vendor Field C30 A	<input type="text"/>	Vendor Field C30 F	<input type="text"/>
Vendor Field C30 B	<input type="text"/>	Vendor Field C30 G	<input type="text"/>
Bidder ID	0000001389	Vendor Field C30 H	<input type="text"/>
Vendor Field C30 D	<input type="text"/>	Vendor Field C30 I	<input type="text"/>
Vendor Field C30 E	<input type="text"/>	Vendor Field C30 J	<input type="text"/>

[Save](#) | [Return to Search](#) | [Previous in List](#) | [Next in List](#) | [Notify](#) | [Add](#) | [Update/Display](#) | [Include History](#)

[Summary](#) | [Identifying Information](#) | [Address](#) | [Contacts](#) | [Location](#) | [Custom](#)

3. Follow up with the approval of the vendor as relevant.

Note: The bidder is linked to an existing vendor only once. After it is linked, system will recognize and directly show “Post Award” button (see above) for future events.

6.4.3 Create new vendor from bidder

If bidder is not registered as a vendor in the system, you need to create a vendor account.

1. Click on “Create Vendor” tab. Note down the vendor ID number and click OK.

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Analyze Events

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Business Unit: AFG10
 Event ID: 0000000165
 Round: 1
 Version: 2
 Event Name: USER GUIDE EVENT - PART 2

Event Format: Buy
 Event Type: RFx
 Currency: USD
 End Date: 15/12/2014 09:45 EST
 Status: Pend Award
 Go To:

☐ Show Award Details to Bidders

☒ Display bids
 ☒ Display all bids
 ☐ Display bid scores
 ☐ Display bid's total bid price
 ☒ Display factors

Award Details

Bidder Name: [PSO TEST 3](#)
 Bidder Type: Bidder
 Buyer: roland.koxhaj

Award Type: Purchase Order
 Award Currency: Event
 Terms:

PO Business Unit: [AFG10](#)

Award Number: 1
 Total Award: 6000.0000

Award Lines

Line	Item ID	Vndr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price
1	24112458E	<input checked="" type="checkbox"/>	G) Cardboard Recyc booth Lam	EA	5.0000	1000.0000	5000.0000
2		<input checked="" type="checkbox"/>	Air Freight	LS	1.0000	1000.0000	1000.0000

[Post Award](#)

[Save](#) |
 [Return to Search](#) |
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 [Refresh](#)

[Analyze Total](#) |
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Message

Vendor **AFG10-0000014718** has been created for the bidder. (20001,94)

Approve the Vendor before proceeding to award a Purchase Order.

[OK](#)

- Open the vendor record from “Add/Update vendor” page. System has recorded the company as a vendor. All information provided by the bidder during the bidder registration process, such as: company Name, contact details, addresses, etc, are copied to the vendor record. Add additional required information, such as banking details, and forward for approval.

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Analyze Events

[Analyze Total](#) | [Analyze Line](#) | [Review Constraints](#) | [Award Summary](#) | [Award Details](#)

Business Unit: AFG10 **Event ID:** 0000000165 **Round:** 1 **Version:** 2 **Event Name:** USER GUIDE EVENT - PART 2

Event Format: Buy **Event Type:** RFx **Currency:** USD **End Date:** 15/12/2014 09:45 EST **Status:** Pend Award **Go To:**

☒ **Show Award Details to Bidders**

☒ Display bids ☒ Display all bids ☐ Display bid scores ☐ Display bid's total bid price ☒ Display factors

Award Details

Bidder Name: [PSO TEST 3](#) **Bidder Type:** Bidder **Buyer:** roland.koxhaj

Award Type: Purchase Order **Award Currency:** Event **USD** **Terms:**

PO Business Unit: AFG10

Award Number: 1 **Total Award:** 6000.0000

Line	Item ID	Vndr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price
1	24112458E	<input checked="" type="checkbox"/>	G) Cardboard Recyc booth Lam	EA	5.0000	1000.0000	5000.0000
2		<input type="checkbox"/>	Air Freight	LS	1.0000	1000.0000	1000.0000

Even though Freight is included in this contract, it is not a normal service of this company so vndr/item relation is removed.

| | |

[Analyze Total](#) | [Analyze Line](#) | [Review Constraints](#) | [Award Summary](#) | [Award Details](#)

1. Select BU;
2. Select the currency for the award. You can choose either the currency of the event, or the currency of the bid;
3. Check Vndr/Item Rel field. Untick those items which are not a normal product of that company.

Note: When the “vndr/Item Rel” box is ticked, this vendor will be linked to this item ID in the procurement catalogue. This can serve as an important tool for buyer to identify potential vendors for specific items. Therefore it is important to pay due attention and use this link responsibly.

4. 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.

7 PUBLISH AWARD

Currently, the system does not publish the award information for any audience. Procurement officer is responsible to publish the award in UNDP and other relevant websites as per the POPP instructions.