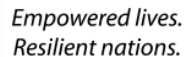


April 2018



What's New in the April 2018 User Guide?

The April 2018 edition of the eTendering User Guide contains important new information and features that have been added to the eTendering system since the release of the July 2016 version of the Guide. The 2018 Guide also contains a simplified structure and design, which is intended to be [more user-friendly for readers so they can navigate to different topics with more ease](#).

While most of the content of this document is similar to the user guide document from July 2016, users are strongly encouraged to refer to this 2018 version for some important new information on the latest system enhancements.

Some of the key changes reflected in this user guide are as follows:

1. Additional sections on new system features, including:

- [1.1 How to amend line items and bid factors during solicitation period;](#)
- [1.2 How to download bidder files at one go using ZIP download feature;](#)
- [1.3 How to use the Evaluation Process Management feature.](#)
- [1.4 Options for how to allow bidders to amend their posted bid.](#)
- [1.5 List of available queries and reports in ATLAS.](#)

2. Extended information on technical support, eTendering benefits and quick guides on eTendering:

- [2.1 Simplified Guides – All the basics you need to know summarized](#)
- [2.2. Why use eTendering?](#)
- [2.3 HelpDesk support structure and FAQs.](#)

Quick References to this Guide

The ***eTendering Guide for Users*** is a manual for UNDP procurement personnel who wish to launch and manage a Tender on the eTendering system.

As a quick reference, readers can navigate directly to a specific topic by clicking on the following hyperlinks:

- For an overview of the benefits of using the eTendering system and reasons to use it, [click here](#).
- For a detailed overview of event creation and the different steps involved in launching a tender, [click here](#).
- If you need to make any amendments to an event, refer to the section on [How to Amend & Manage Events](#).
- To analyze, review and evaluate bids, go the section on [Opening and Evaluation of Bids](#).
- For instructions on how to award a bidder and create a PO, [click here](#).
- If you are experiencing any technical difficulties or have a question about the eTendering system, see the section on [Helpdesk Support and FAQs](#).

For a more detailed overview of the key sections in this User Guide, please refer to the [Table of Contents](#).

How to use this Guide



Click to return to TOC

This guide is organized in several sections that correspond to different functions of the eTendering system. Each section has its specific designated colour.

The Table of Contents (TOC) provides an overview of the document content. It contains hyperlinks to the exact page of the content in the document so the reader can navigate directly to the relevant section. Each section starts with a brief overview of the content of that section with hyperlinks.

Throughout the document, there are three types of hyperlinks:


- Hyperlink buttons that will take reader to the main TOC, found at the top right corner of each main chapter page, such as the one on this page.
- Hyperlinks that take readers to the beginning of the current section, usually found at the bottom left corner like in this page.
- Hyperlinked words that take reader directly to a location of the document related to the text. For example, by clicking on the hyperlinked [TOC](#) here, the reader can go directly to the TOC page of this document.
- Throughout the document, you may see the  sign. This means that there is a specific question and answers in the FAQ section that relates to the content of the page and location where the FAQ sign appears.

Table of Contents *1 of 3

1.0 Introduction

- [1.1 Why Use eTendering?](#)
- [1.2 Who is Using eTendering? Quick Stats](#)
- [1.3 eTendering Workflows](#)

2.0 Launching eTendering in my Office

- [2.1 Preparing for eTendering](#)
- [2.2 eTendering User Profiles – How They are Granted](#)
- [2.3 Assign Event Approver Role](#)

3.0 eTendering at a Glance

- [3.1 Create Event – Event Summary](#)
- [3.2 Amend an Event & Manage Event Workbench](#)
- [3.3 Open & Download Bids](#)
- [3.4 Evaluation Process Management Feature](#)
- [3.5 Award Tender](#)

Table of Contents *2 of 3

4.0 Launch a Tender

- [4.1 Prepare and 4.2 Create event](#)
- [4.3 Approve Event and 4.4 Publish procurement notice](#)
- [4.5 Copy from a template in the system](#)
- [4.6 Copy from another event](#)
- [4.7 Create an event for a Request for Proposal \(RFP](#)
- [4.8 Create an event for ITB with LOTS](#)
- [4.9 Create an event for RFI, EOI & Prequalification exercises](#)

5.0 Make Tender Amendments & Manage Events

- [5.1 Access Event Workbench](#)
- [5.2 Search for events in the system](#)
- [5.3 Make an amendment to an on-going tender.](#)
- [5.4 How to make changes to line items and Bid factors \(Important\)](#)
- [5.5 Updating Event Attachments](#)
- [5.6 View approval status of an event](#)
- [5.7 View Bidder participation history](#)
- [5.8 View event history and changes](#)

6.0 Opening & Evaluation of Bids

- [6.1 Public Bid Opening report \(only for ITBs\)](#)
- [6.2 Public Bid Opening for LOTS](#)
- [6.3 Opening & Downloading Bids](#)
- [6.4 Using the Evaluation Process Management feature](#)

Table of Contents * 3 of 3

7.0 Tender Award from System

- [7.1 Identify awarded bidder](#)
- [7.2 Specify Awarded quantities](#)
- [7.3 Create vendor and Purchase Order](#)
- [7.4 Close event manually \(when no award made or only partial award\)](#)
- [7.5 Publish Award](#)

8.0 eTendering Queries & Reports

- [8.1 Capture Bidder Details, Basic Event details & Bidder activity](#)
- [8.2 Capture Line Item and Bid Factor activity for an event](#)
- [8.3 Capture Evaluation and Event Analysis activity](#)
- [8.4 Capture Purchase Order & eTendering Event/Usage Data](#)
- [8.5 Review Bidder Profiles & Search Bidder Activity](#)

9.0 Helpdesk Support & FAQs

- [9.1 eTendering Resources](#)
- [9.2 Helpdesk Support Workflow](#)
- [9.3 Frequently Asked Questions](#)



[Click to return to TOC](#)

1.0 Introduction

This section provides an introductory overview of the eTendering system, including the benefits of using the system to launch and manage tenders, who and where UNDP eTendering users are, and how the business process on eTendering works.

[1.1 Why Use eTendering? eTendering Benefits](#)

[1.2 Who is Using eTendering? Some Statistics](#)

[1.3 eTendering workflows](#)

1.1 Why Use eTendering?

eTendering is an Atlas module that enables UNDP buyers to manage tender processes online. It is integrated with other Atlas modules and links to other steps such as Requisition, Vendor creation and Purchase Order.

Some of the main benefits of using eTendering include:

1. Enhances the integrity and transparency of the procurement process;
2. Creates efficiency gains and cost savings through process automations;
3. Tracks important data and generates reports for better informed strategic decisions related to procurement.



Click to return to
Intro Main Page



Paper Bid Submissions



1.1 Why Use eTendering?

REASON 1: INTEGRITY AND TRANSPARENCY OF THE PROCUREMENT PROCESS ARE ENHANCED:

- ✓ The system does not accept late bids;
- ✓ Bids are digitally stamped;
- ✓ Alterations are not allowed after the bidding deadline;
- ✓ An audit trail of all user actions is kept by the system.



Click to return to
Intro Main Page



Paper Bid Submissions



1.1 Why Use eTendering?

REASON 2: ENABLES CONSIDERABLE EFFICIENCY GAINS AND COST SAVINGS
– up to 30 % staff time saved

- ✓ Tracking interested bidders, sharing amendments, and bid submission/receipt process is automated;
- ✓ Public bid opening is automated and sent to all participating bidders via email;
- ✓ Creation of vendors, purchase orders, and informing non-awarded bidders is automated;
- ✓ Eliminates the need for hard-copies of documents, reducing administrative costs (stationery, office furniture and space, etc.).



Click to return to
Intro Main Page



Paper Bid Submissions



1.1 Why Use eTendering?

REASON 3 - PROVIDES IMPORTANT DATA FOR STRATEGIC DECISION MAKING AND MONITORING OF PROCUREMENT PROCESSES, FOR EXAMPLE:

- ✓ Keeps a register of suppliers and their bidding activity;
- ✓ Allows monitoring of UNDP tendering activity globally and per each Country Office, enabling reports on what, when, and how much UNDP is procuring globally and per Country Office;
- ✓ Better control on vendor creation, reducing duplicate vendors;
- ✓ Keeps track of procurement process milestones, enabling monitoring of procurement efficiency;
- ✓ Provides information on supplier pool and participation, where are the bidders participating in tenders globally and in each Country Office.



[Click to return to
Intro Main Page](#)

1.2 Who is using eTendering?

As of February 2018 the main users of eTendering are:

RBLAC: 5 offices with over **360 tenders** in total
Biggest users: Colombia, Barbados, Dominican Republic.

RBEC: 13 offices with over **230 tenders**. **Biggest users:** Kosovo, Azerbaijan, Georgia, Montenegro, Moldova, Kyrgyzstan, and Ukraine.

RBAS: 7 offices and over **350 tenders** in total.
Biggest users: Kuwait, Sudan, Iraq, Yemen, Lebanon.

RBA: 7 offices with over **20 tenders** in total **Biggest users:** Zimbabwe, Nigeria, Burkina Faso, Angola.

HQ: eTendering used by PSU in Copenhagen, New York, and Kuala Lumpur and UNV office in Bonn HQ with over **100 tenders** in total.

Since the launch of eTendering in 2013, **more than 2,000 tenders have been launched** and managed through the system with **more than 13,000 bids received**. More offices have started to use the system during 2016 and 2017, bringing the **total number of offices who have used the system to almost 50**. Number of tenders launched through eTendering has also increased, with **almost 600 tenders launched during 2016 and 900 during 2017**.

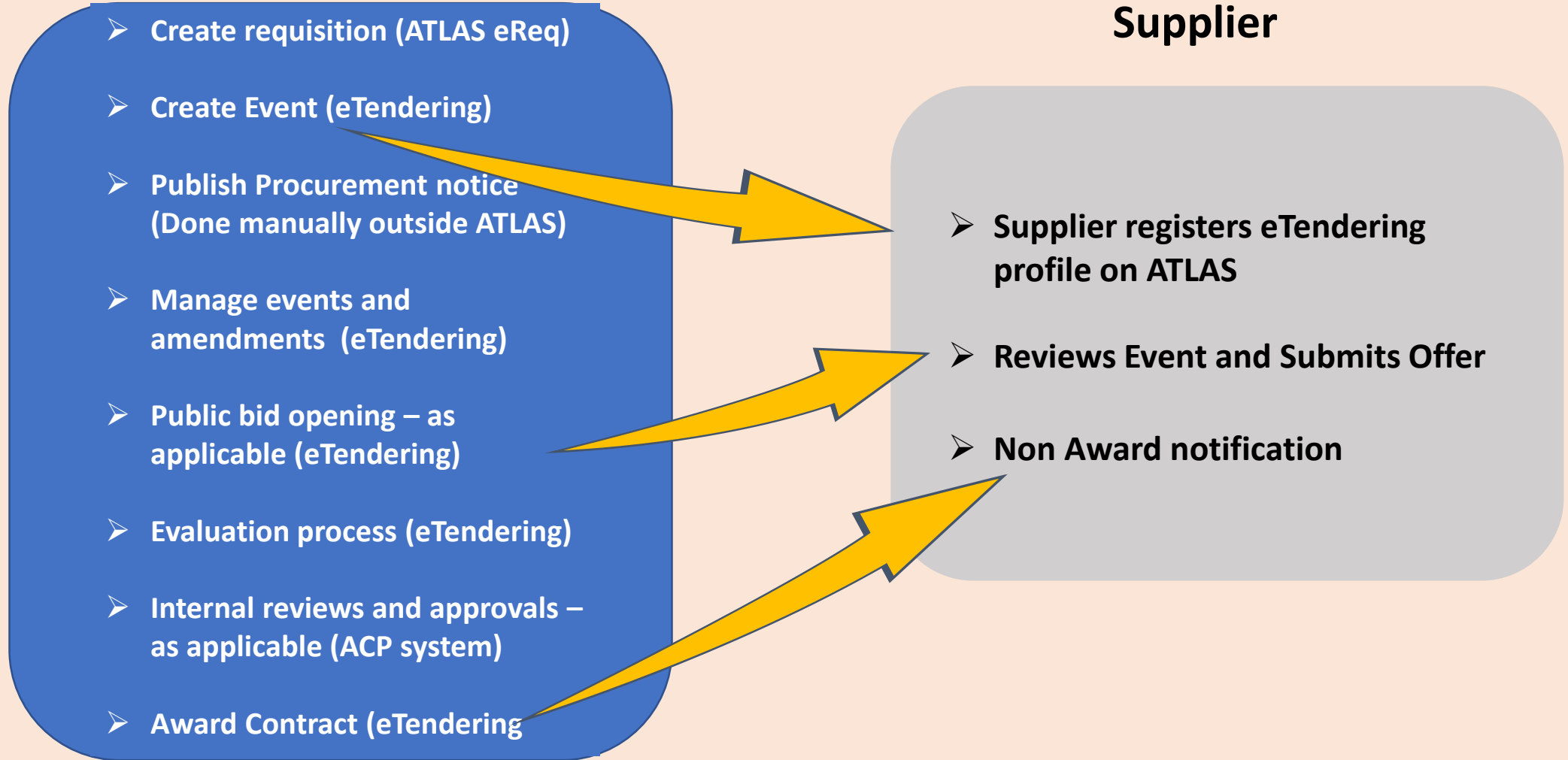
RBAP: 14 offices and over **1000 tenders** in total. **Biggest users:** Afghanistan, India, Bangladesh, Myanmar, Pakistan, Iran, Indonesia, Papua New Guinea, etc.



Click to return to
Intro Main Page

1.3 eTendering workflows

UNDP Tender Process



Click to return to
Intro Main Page



[Click to return to TOC](#)

2.0 Launching eTendering in my Office

This section describes the main activities that must be accomplished by a Country Office in preparation of the eTendering rollout. To ensure that a Country Office holds the necessary capacity to use eTendering, it is recommended to review the instructions in this section.

[2.1 Preparing for eTendering](#)

[2.2 eTendering User Profiles – How They are Granted](#)

[2.3 Assign Event Approver Role](#)

2.1 Preparing for eTendering

- ✓ **Share learning resources with System Users:** In addition to this User Guide, Buyers can access helpful eTendering resources such as presentations, manuals and resources for bidders [here](#).
- ✓ **Join the UNDP eTendering Yammer Group:** Join the yammer eTendering group to receive news on system updates, upcoming webinar trainings and to converse with other UNDP eTendering users – click [here](#)
- ✓ **Train with the ATLAS training site:**
 - **As a UNDP user** - <https://finance-training.partneragencies.org> can be accessed with same user name as main ATLAS but different password. Reactivate your password or contact PS support for access.
 - **As a bidder** – <https://etendering-training.partneragencies.org>.
You can create a bidder profile in training using instructions in the user guide for bidders.
- ✓ **Identify system users and grant correct access:** While all Atlas buyers automatically have access to eTendering, Event approvers must be identified by management and granted approver status by the ARGUS focal point.
- ✓ **Share eTendering resources with Bidders:** The 2018 Bidder Guide is available in English, French, Spanish and Russian. Bidders can also view instructional videos in English, French and Spanish. Russian, Chinese and Arabic subtitles of the videos are also available. To access Bidder resources, click [here](#).



It is recommended that 1-3 people per Country Office are assigned as focal points for eTendering to serve as the first screening for potential queries by both UNDP users and bidders. These focal points may receive more in-depth training on the system and will channel all support cases from office to eTendering support.



Click to return to
Launch eTendering
Main Page

2.2 eTendering User Profiles – How they are Granted

Event Creator: can create and modify an event. All procurement buyers have this role by default in eTendering.

Event Approver: *Can be added by ARGUS focal point to either Manager or Procurement buyer profiles. Can approve events created by Buyers.*

Collaborator: Evaluation team members. To be invited to evaluate a specific tender, a person must have collaborator role added to his/her profile.



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

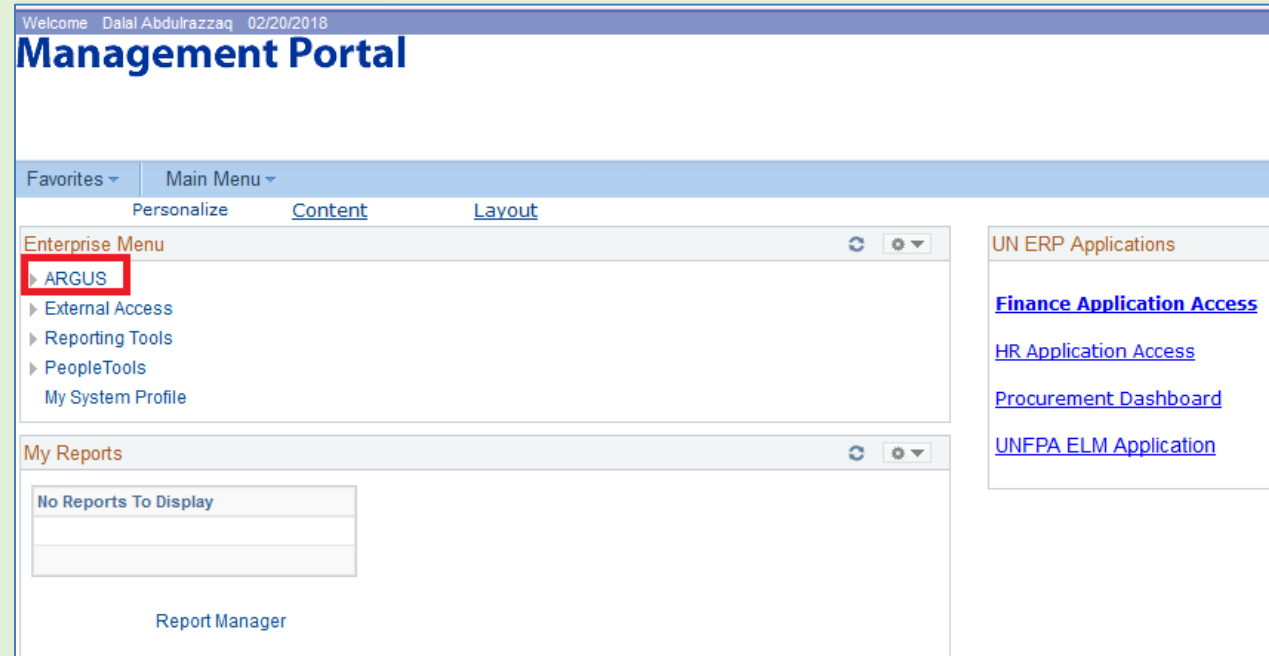


2.3 Assign Event Approver role

The eTendering Event Approver role is determined by the BU, and assigned by the Argus Focal Point.

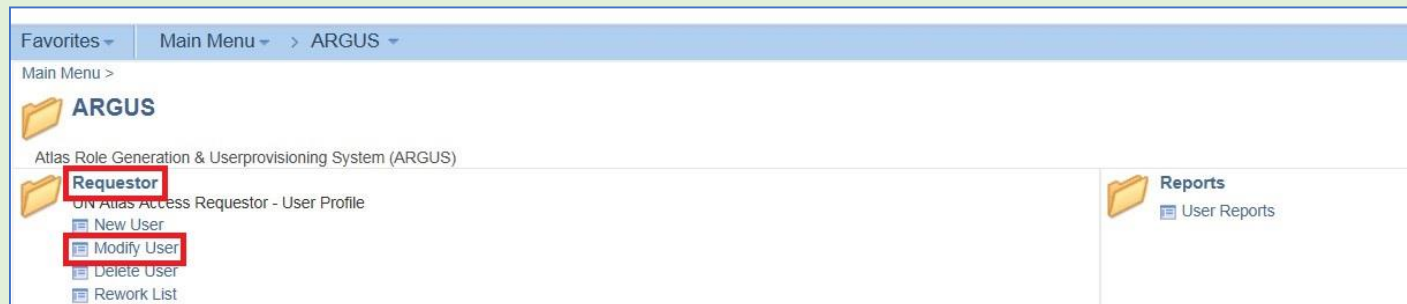
1

To assign the roles, go to the Atlas front page and click on “**ARGUS**”.



2

Click on “**Requestor**” → “**Modify User**”



Click to return to
Launch eTendering
Main Page

2.3 Assign Event Approver role

3 Click on **“Modify User”** Profile

Favorites ▾Main Menu ▾ > ARGUS ▾ > Requestor ▾ > Modify User

Search User To Modify

Agency

UNDP1

UN Development Programme

Location

DNK

Denmark

Business Unit

UNDP1

UN Development Programme

Department

B0130

Find Individual User

First Name:

Roland

Last Name:

KOXHAJ

Contract Type:


FTA

Fixed Term Appointment



User Ref ID

77584


Modify User Profile

 ☐ Search Users in All Units

ARGUS Look-up

Personalize | Find | View All |  

First 1 of 1 Last

	Sel	User ID	Agency	Loc	Bus Unit	Dept	Pending?	Contr Type	User Ref ID	E Mail ID	Job Function
1		roland.koxhaj	UNDP1	DNK	UNDP1	B0130		FTA	77584	roland.koxhaj@undp.org	PROCUREMENT ASSOCIATE

4 Go to Atlas Profile and check the box **“eTendering Event Approver”**.

Favorites ▾Main Menu ▾ > ARGUS ▾ > Requestor ▾ > Modify User

User InformationAtlas ProfileSpecial Instructions

Modify User Profile

Specify the appropriate ATLAS profiles being requested

☒ Finance HQ☒ eServices☐ Human Resources☐ HQ Bonn Volunteer User Only☐ SAS HQ User Only☐ WFP User Only☐ UNTAR/SSC Users Only

Profiles

☐ Senior Manager☐ Manager Level 2☐ Manager Level 1☐ Finance User☒ Procurement Buyer☐ General User☐ Project Manager

Supplementary Functions

☐ Send To KK☐ GL JE Approver☐ Vendor Approver☐ Fund Manager☐ Override Match Exception☐ T&E Approver Level 1☐ T&E Approver Level 2☐ Asset Focal Point☐ Asset Manager☐ DMS Revenue Focal Point☐ DMS Revenue Approver☒ eTendering Approver



Click to return to
Launch eTendering
Main Page



[Click to return to TOC](#)

3.0 eTendering at a Glance

This section provides a quick breakdown of the key pages and corresponding functions in eTendering that enable buyers to create, manage and analyze events. Each key function is summarized in a table and where relevant, hyperlinked to the more detailed instructions in this guide.



This section is only a quick breakdown of the key pages in eTendering. For detailed instructions please review the rest of the guide.

[3.1 Create Event – Event Summary](#)

[3.2 Amend an Event & Manage Event Workbench](#)

[3.3 Open & Download Bids](#)

[3.4 Evaluation Process Management Feature](#)

[3.5 Award Tender](#)

3.1 Create an Event: Event Summary

The Event Summary page is where buyers can begin to populate the details of the event such as deadline and event name. To begin the event creation process on eTendering go to the Main menu in ATLAS and click on **eTendering → Create Events → Event Details → Event Summary**.

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: 28/02/2018 5:50AM EST


*Start Date: 28/02/2018 5:50AM EST


*End Date: 21/03/2018 6:50AM EDT

Copy From: Go

Event Method:

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

 Note that the system is set in New York timezone/EST

 View more detailed instructions on launching and creating an event on eTendering [here](#).

Reference	Description
<div>Event Name</div> <div>Descr</div> <div>1</div>	<p>Title of the tender process.</p> <p>In the Descr field, you can enter any general text, e.g. cover page of the solicitation document.</p> <p>This information is captured in the PDF file generated by system and email notifications sent to bidders.</p>
<div>1. Preview date</div> <div>2. Start date</div> <div>3. End date</div> <div>2</div>	<p>1. The date bidders can view the event and download attachments in eTendering.</p> <p>2. The date bidders can start submitting bids.</p> <p>3. The deadline for submission of bids.</p>
<div>Copy From</div> <div>3</div>	<p>The buyer can copy details to the event from a template or a previous event here.</p>
<div>Event Method</div> <div>4</div>	<p>From this drop-down menu, buyers can indicate the Event Method (IC, ITB, RFP, RFQ or Other). This does not change the process flow, but will be very useful for statistics purposes.</p>

3.1 Create an event: Event Summary

Step 1: Define Event Basics

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

[Payment Terms and Contact Info](#)

Event Comments and Attachments

Event Header Bid Factors

Step 2: Configure Line Items

Create line listings for this event.

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.

Post

Save As Template

[Preview PDF](#)

Approver List



Even if an event is posted on eTendering, Tender notices must always be posted on the UNDP website, UNGM etc.



[Click to return to eTendering at a Glance Main Page](#)

Reference	Description
Step 1: Define Event Basics	<p>Event Settings and Options: Buyers can select whether partial bidding is allowed (Bid Required On All Lines) or if multiple bids are allowed (Alternate Bids Allowed).</p> <p>Event Comments and Attachments: Buyers can upload solicitation documents and other forms part of the tender documents.</p> <p>Event Header Bid Factors: Event questions for bidders to answer during bid submission can be added here. These may be YES/NO, free text, numeric, or other type of questions.</p> <p>Payment Terms and Contact Info: Here Buyers select if multiple currencies are allowed, define payment terms, and share contact details of the focal point for the tender</p>
Step 2: Configure Line items	Here, buyers can add a price schedule, including Atlas Item ID, quantities and line comments. Buyers can also copy details from a requisition, in which case the COA will also be copied to the Purchase Order at a later stage.
Step 3: Invite Bidders	Defines whether a tender is open or limited competition. Bidders registered in the system can be directly invited to the event for a limited competition type of tender. For open competition type, any bidder registered in the system can access and participate.
Step 4: Preview PDF	A system generated PDF printout and XML/XLS format of the event. Can be used for easier sharing and review, especially for the formulation of bid factors with other colleagues.
Step 5: Save and Post Event	<p>Save event: Click on Save event to save event details that have been added before posting. Save often so you don't lose information entered.</p> <p>Post: Click here to post the event for approval. System will send notification to all eligible approvers. Events are not visible for bidders in eTendering until event is approved.</p> <p>Approver List: The buyer can view the eTendering event approvers for the BU, and copy the hyperlink to send to any approver as necessary. All people mentioned in the Approver List are automatically notified once the event is posted for approval.</p>



3.2 Amend an Event and Manage Event Workbench

Most of the key functions for managing an event on eTendering can be found via the Event Workbench. To navigate to the Event Workbench, login to your ATLAS, and click on **eTendering → Maintain Events → Event Workbench**.

Event Workbench

Search Criteria

Event ID: 197
Business Unit: UNDP1
Event Format:
Event Type:
Event Status:
Associated With Plan:
Plan Name:
From Start Date:
To Start Date:
From End Date:
To End Date:
Category:
Item ID:
Item Description:
Plan Name:
Sort With:
Sort Order:
☐ Only show Events I created
☐ Use my search defaults
Search Reset
Default Search Preferences

Legend

Search Results

Event ID	Name	Format	Type	Unit	Status
0000001973	UNDP eTendering Us...	Buy	RFx	UNDP1	Event Completed
0000001970	test event	Buy	RFx	UNDP1	06/03/2018 11:21 AM EST

How to Search for Events

It is possible to search for the event you are working on by using the following filters:

- **Event ID** – to find a specific event.
- **Business Unit** – all events for a specific BU.
- **Event Start Dates** – events that have the start date within a specified range.
- **Event End Dates** – events that have the end date within a specified range.
- **Events created by you** (by checking the box “Only show Events I created”).
- **By type or status of events**, e.g. awarded events only.
- **Line items information – category, ID, or description:** To search for tenders for specific goods/services. Can be useful to find examples of specifications and ToR.



Click to return to
eTendering at a
Glance Main Page

3.2 Amend an Event & Manage Event Workbench

Event Workbench

Search Criteria

Event ID:

Business Unit: UNDP1

Event Format:

Event Type:

Event Status:

From Start Date:

To Start Date:

From End Date:

To End Date:

Sort With:

Sort Order:

Category:

Item ID:

Item Description:

Only show Events I created

Use my search defaults

Search

Reset

Associated With Plan

Plan Name

Default Search Preferences

Legend

Event ID	Name	Format	Type	Unit	Status	
CPUP17-013	UNDP-BMS-OIMT-RFP...	Buy	RFx	UNDP1	22/12/2018 05:00 PM EST	
0000001888	UNDP-BMS-OIMT-RFP...	Buy	RFx	UNDP1	Open	
0000001975	ITB - UNDP eTender...	Buy	RFx	UNDP1	Open	
0000001979	we	Buy	RFx	UNDP1	Open	
0000001978	eTendering User Gu...	Buy	RFx	UNDP1	Open	
0000001977	eTendering User Gu...	Buy	RFx	UNDP1	03/04/2018 05:37 AM EDT	
0000001976	1213	Buy	RFx	UNDP1	Open	
0000001974	Test	Buy	RFx	UNDP1	Open	
0000001972	Open ITB - Simple ...	Buy	RFx	UNDP1	Open	
0000001970	test event	Buy	RFx	UNDP1	Event Completed	
0000001960	Edit Bid Factor Te...	Buy	RFx	UNDP1	Pending Post Approval	
0000001973	UNDP eTendering Us...	Buy	RFx	UNDP1	Pending Award	



Please note It is important to filter to the correct event to avoid accidentally making changes to other events.

Reference	Description
Event ID 	Hyperlink to the main event page. If the event is not in “Open” status, the buyer can only view the event details, and not make any changes.
Create a New Version 	Click here to make amendments to an event. Changes made are not visible to bidders until approved. NOTE: <ol style="list-style-type: none">Cannot create and/or approve a new version of an event if the deadline of the previous event has already passed.Be aware of impact to bids when editing line items or bid factors. Read detailed instructions for further explanations.
Approval Status 	Check the approval status and the list of approvers for a specific event. Here you see also the comments made by approver when approving or denying an event.
View Event History 	This is where the buyer can find and view previous event versions, and see who last modified an event version and when.
Analyze events 	After an event deadline closes, this icon will appear which enables buyers to: <ol style="list-style-type: none">View all bids, including prices and attachments.Generate the public bid opening report if applicable.Use the evaluation module to evaluate bidsCreate Purchase Order and Vendors.
View Bid History 	View basic information on posted bids and accepted invitations here. Before an event closes, a buyer can click here to view participants to date. After the event closes, bid prices can be viewed here. If it is a LOT event, the Public Bid Opening can be conducted from here.
Cancel Event 	Click here to cancel an event. Cancelling latest version of the event in a status as “open” cancels only that version and not the whole event. If the status is “Posted”, the whole event is cancelled and cannot be reactivated again.



Click to return to eTendering at a Glance Main Page

3.3. Open and download bids

Analyze Events

Analyze Total [Analyze Line](#) [Review Constraints](#) [Award Summary](#) [Award Details](#) Public Bid Opening Notification

Business Unit: UNDP1 Event ID: 0000001973 Round: 1 Version: 6 Event Name: UNDP eTendering User Guide for Buyers (2018)

Event Format: Buy Event Type: RFx Currency: USD End Date: 15/02/2018 8:00AM EST Status: Pend Award Go To:

...

Bid Analysis and Display Options

Header:

Sort Bids By: Total Event Score

Weighting:

Display Options: View Factor Responses

☐ Display Delta Responses

View Bid Actions ☒ All Bid Actions ☐ Award ☐ Counter ☐ Disallow

Analyze

...Analyze Export

Associate Planning Task

Create New Round

Document Status Inquiry

Event Attachments/Comments

Invite Collaborators

Display Withdrawn Bidders

Analysis

Bidder Name: [Wales Invest Services Co.](#) [COMET AFRIQUE TELECOM](#)

Event Version: 3

Bid Number: 1

Total Bid Amount: 11.0000

Total Bid Cost: 11.00

Total Event Score: 100.0000

Total Header Cost: 0.00

Total Header Score: 0.0000

Attachments: [Download Bidder Files](#)

Bid Action:

Award

NA

NA

Reject Reason Code:

Award by Percent:

Factors

	Weighting	UOM	Ideal
Have you submitted the financial proposal as per the form and instructions provided in the solicitation documents. Financial Proposal must be submitted as a separate file encrypted with a password. None of the financial proposal data is disclosed in other documents of the submission. UNDP shall request password for opening the Financial Proposal only from the Proposers who pass the Technical Evaluation as per the criteria established and disclosed in the solicitation document. The Proposer shall assume the responsibility for not encrypting the financial proposal. DO NOT DISCLOSE YOUR PRICE IN THE LINE ITEMS. YOU MUST PUT PRICE AS 1 IN THE SYSTEM AND PROVIDE THE FINANCIAL PROPOSAL AS ENCRYPTED FILE AS EXPLAINED ABOVE.	0.00000	Y	Y

Recalculate

Add/Edit Factors

Evaluation Report and Documents

<<

<

>

>>

Reference	Description
Public Bid Opening Report 1	Click here to generate an automated Public Bid Opening Notification, when a Public bid opening is required. System will be send and email with public bid opening information to all bidders who have a posted bid in eTendering.
Export Analyze events file 2	To generate an Excel overview of the submitted bids, including answers bid factors and bid prices, select “ Go To: ...Analyze Export ”. System will send an email with an .xml-file that can be opened in Excel, and used as a template for the evaluation tables.
Download Bidder Files 3	All of the files that the Bidder has submitted with their bid can be downloaded in a zip folder by clicking on the “ Download Bidder Files ” link.
Header comments 4	All bidder attachments that were uploaded at the General Comments section of the bid can be found here, including the system generated PDF file that confirms the bidder’s bid submission. Use the list of attachments in the PDF file to crosscheck the bidder files you have downloaded.
Analyze Line 5	Shows the bid price and information per line item. Check all line items for attachments.
Evaluation report and documents 6	Click here to access the evaluation process management feature.
Invite Collaborators 7	Click on this option under the “ Go To: ” drop down menu to invite collaborators to review and provide their comments on the event.

Click to return to eTendering at a Glance Main Page

3.4 Evaluation process management feature

Collaborator Evaluation page

1

2

3

4

Upload Attachments

Business Unit

Event ID

Event Round

Event Version

Notify Collaborator

Attached File	Description	Add Attachment	View Attachment
1 Evaluation_Report.docx	Evaluation	Add Attachment	View Attachment
2 Evaluation_Clarifications.docx	Evaluation - Annex	Add Attachment	View Attachment
3 Composition_of_evaluation_team.docx	Team Summary	Add Attachment	View Attachment

Summary of Evaluation Conclusions:

Scroll Area

Collaborator Oprid roland.koxhaj

Routing Sequence 2

Collaboration Award Status Pending

Email ID roland.koxhaj@undp.org

Description

☐ Evaluator SignOff

Collaborator Oprid arvis.vilcins

Routing Sequence 3

Collaboration Award Status Pending

Email ID arvis.vilcins@undp.org

Description

☐ Evaluator SignOff

Collaborator Oprid rakesh.ranjan

Routing Sequence 4

Collaboration Award Status Pending

Email ID shefali.mathur@undp.org

Description

☐ Evaluator SignOff

OK

Cancel

Refresh

Reference	Description
Notify collaborator 1	Once the procurement officer creates the evaluation <u>committee by inviting members as “Collaborators”</u> the Evaluation team will receive an email notification. The email will include a statement on impartiality and confidentiality.
Manage attachments 2	Once an evaluation is completed, the procurement officer overseeing the process can upload all relevant documents (evaluation clarifications, tables, report, etc.) here.
Summary of Evaluation Conclusions 3	This text box field is is where the procurement officer can write a summary of the main evaluation conclusions.
Evaluator Sign off 4	Evaluators can review information recorded by the procurement officer then edit any of the information on the page. When all evaluators are in agreement with the information recorded, each one will signoff by selecting the “Evaluation signoff” box.

Click to return to eTendering at a Glance Main Page

3.5 Award Tender

Analyze Events

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

Business Unit: ARM10 | Event ID: 0000001981 | Round: 1 | Version: 3 | Event Name: Registration test

Event Format: Buy | Event Type: RFx | Currency: USD | End Date: 14/03/2018 11:10AM EDT | 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

Bidder Name: eTendering Bidder | advisa Unternehmensberatung GmbH | eTendering Company for UN

Event Version: 2 | Bid Number: 2 | Total Bid Amount: 12.0000 | Total Bid Cost: 12.00 | Total Event Score: 90.7000 | Total Header Cost: 0.00 | Total Header Sp: 0.0000

Attachments: 1 | Download 1 Files | Download Bidder Files | Download Bidder Files

Bid Action: Reject | Award | Counter | Disallow | NA | Reject

Reject Reason Code: | Award by Percent: | Factors

4. Have you uploaded fully completed and duly authorized Bid submission form? (Ref. Section 4) | 0.00000 | N | N

Recalculate | Add/Edit Factors | Evaluation Report and Documents

Save | Return to Search | Notify | Refresh

Reference	Description
Award Status 1	The Award Status is where the award decision for each bidder is indicated. To do this, the buyer must first navigate to the Analyze Events page, and from the drop-down menu at the Bid action level, select whether the bidder is “ Awarded ”, “ Rejected ” or “ NA - Not Awarded ”. It is possible to choose Award for several bidders in the case of a split award.
Award Summary 2	The Award Summary page is, where the buyer can reflect the award in eTendering by entering the awarded quantities.
Awarded Quantity 3	This is where the buyer can specify the quantities to be awarded for each line.

Analyze Events

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

Business Unit: UNDP1 | Event ID: 0000001973 | Round: 1 | Version: 6 | Event Name: UNDP eTendering User Guide for Buyers (2018)

Event Format: Buy | Event Type: RFx | Currency: USD | End Date: 15/02/2018 8:00AM 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 000000000000000005computer 1.0000 1.000000 1.0000 0.0000 0.0000 1.0000

Select Name Awarded Qty Total Line Amount Extended Amount

Wales Investment and Services Co. Ltd. 0.0000 11.00000 0.0000

Add Award for Selected Bidder | Schedule Defaults

Event Award Summary: Total Awarded Qty Total Awarded Price Quantity Remaining

0.0000 0.0000 1.0000

Recalculate

Save | Return to Search | Notify | Refresh

Analyze Total | Analyze Line | Review Constraints | Award Summary | Award Details

Once the evaluation has been completed and all required approvals are obtained, the procurement officer managing the case must reflect the final outcome of the process in the eTendering system. The **Award Summary & Award Detail** pages can be accessed via the **Analyze Events** page to award the bidder, create a vendor and purchase order.



Click to return to eTendering at a Glance Main Page

3.5 Award Tender

4

Analyze Events

[Analyze Total](#) [Analyze Line](#) [Review Constraints](#) [Award Summary](#) [Award Details](#) [Public Bid Opening Notification](#)

Business Unit: UNDP1

Event ID: 0000001975

Round: 1

Version: 6

Event Name: ITB - UNDP eTendering Guide for Buyers - 2018

Event Format: Buy

Event Type: RFX

Currency: USD

End Date: 19/03/2018 11:54AM EDT

Status: Awarded

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 1 Last

Bidder Name: [advisa Unternehmensberatung GmbH](#)

Bidder Type: Bidder

Buyer: [dalal.abdulrazzaq](#)

Award Type:

Purchase Order

Award Currency:

Event

 USD

Terms:

30

PO Business Unit: [UNDP1](#)

Total Award: 12.0000

Award Number: 1

Award Lines

Line	Item ID	Vndr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price	
1	0000000000000000009	<input checked="" type="checkbox"/>	Correction Pen Uni Metal	EA	1.0000	12.0000	12.0000	<div><div></div><div></div></div>

Create Vendor

Analyze Events

[Analyze Total](#) [Analyze Line](#) [Review Constraints](#) [Award Summary](#) [Award Details](#) [Public Bid Opening Notification](#)

Business Unit: UNDP1

Event ID: 0000001973

Round: 1

Version: 6

Event Name: UNDP eTendering User Guide for Buyers (2018)

Event Format: Buy

Event Type: RFX

Currency: USD

End Date: 15/02/2018 8:00AM 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 1 Last

Bidder Name: [Wales Investment and Services Co. Ltd](#)

Bidder Type: Bidder

Buyer: [dalal.abdulrazzaq](#)

Award Type:

Purchase Order

Award Currency:

Event

 USD

Terms:

30

PO Business Unit: [UNDP1](#)

Total Award: 11.0000

Award Number: 1

Award Lines

Line	Item ID	Vndr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price	
1		<input checked="" type="checkbox"/>	INSERT ITEM DESCRIPTION AND CORRECT CATEGORY	EA	1.0000	11.0000	11.0000	<div><div></div><div></div></div>

Post Award

Save

Return to Search

Notify

Refresh

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



Avoid Vendor Duplicates:

Before creating a new vendor, always check if the bidder already exists in the vendor database for their BU.

Reference

Description

Award Details

4

From this page, Vendors and Purchase Orders can be created directly through eTendering. If the PO is created through this page, all details available in the event will be copied. If the event was sourced from a requisition, the COA will also be copied to the PO. The buyer can thereafter make any amendments as needed before notifying the manager for approval.

Create Vendor

5

eTendering is linked to the Vendor module in Atlas and it is possible to automatically create a vendor with the bidder account details. The first time a Purchase Order is created through eTendering for a new bidder, the button will say **“Create Vendor”** regardless of whether the bidder is already registered as a vendor in Atlas or not. The buyer need to reconfirm in the vendor database whether the vendor already exists or not before proceeding.

Post Award

6

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



Click to return to eTendering at a Glance Main Page



4.0 Launch a Tender on eTendering

This section will guide the buyer on how to create an event on eTendering, including RFPs, ITBs with LOTS, EOI, etc. Buyers can choose from 3 different options for creating an event, including preparing an event in the system from scratch, copying from a template, or copying from a previous event.

4.1 Preparatory actions

- [Develop Procurement strategy](#)
- [Prepare Event Template](#)

4.2 Create Event

- [Begin Event Creation](#)
- [Main Event Creation Page](#)
- [Enter Basic Event Details](#)
- [Payment Terms & Contact Info](#)
- [Add Event Comments & Attachments](#)
- [Event Header Bid Factors](#)
- [Configure Line Items](#)
- [Invite Bidders](#)
- [Invite Collaborators \(Optional\)](#)
- [Post Event for Approval](#)

[4.3 Approve Event](#)

[4.4 Publish procurement notice](#)

[4.5 Copy from a template in the system](#)

[4.6 Copy from another event](#)

[4.7 Create an event for a Request for Proposal \(RFP\)](#)

[4.8 Create an event for ITB with LOTS](#)

[4.9 Create an event for Request for Information \(RFI\), Expression of Interest \(EOI\) and Prequalifications exercises](#)

4.1 Develop a Procurement strategy

It is recommended that events are created in the system only after the procurement strategy is defined and the solicitation document is completed. Below is a checklist of some preliminary considerations to make before finalizing the event as they affect some of the event settings and setup. Please note that this list is not conclusive. Depending on the case, other factors may be considered as well.



Instructions included in section 4.1 relate to preparations and activities outside eTendering system.

Preliminary Considerations	Relevance for Event Creation
<i>Is it an RFP, ITB, RFQ, or IC?</i>	This is important because it will determine which template will be used for the event.
<i>Is it an open or limited competition?</i>	If the event is a limited competition, the <u>shortlisted bidders need to be registered in the system so they can be invited to the event.</u>
<i>Will there be any LOTs? Construction of price schedule.</i>	The line items and their sequence in eTendering must correspond with the Technical specifications and schedule of requirement form. For Lots, a detailed item composition must be created per each LOT, in excel format.
<i>Is partial bidding allowed?</i>	This needs to be reflected in settings in the system to allow or not allow bidders to quote for only some items.
<i>What are the minimum requirements and other evaluation criteria?</i>	Some of the minimum requirements can be captured in the bid factors.
<i>What will be the bid currency? Are other bid currencies allowed?</i>	This information can be reflected in the event setup.
<i>What is the expected deadline for submission of bids?</i>	Deadlines need to be specified during event set-up.
<i>Who will be the focal point?</i>	To include in the event.



4.1 Prepare Solicitation Documents

Before creating the event in the eTendering system, procurement officers first need to ensure that a few preparatory steps are completed outside the system, including [defining the procurement strategy](#) and preparing solicitation documents.

The new solicitation documents launched by PSU in 2018 now include provisions for the eTendering system and can be found here: <https://intranet.undp.org/unit/oalts/oso/psu/SitePages/Procurement%20Forms%20and%20Contracts.aspx>.

Several templates have been created in eTendering system. These reflect the solicitation templates and include commonly-used event settings and bid factors in eTendering.

Creating a new event by [copying an existing template](#) shortens the time it takes for buyer to create an event and also standardize the event setup.



It is the buyer's responsibility to ensure that any **template used corresponds fully to the specifics of the tender** being launched and to adjust the details as needed during event creation.



There are several system restrictions for uploading files that bidders must pay attention to. Please include the note below in the solicitation document to advise Bidders on how to correctly upload their supporting documentation on eTendering

Please note that when uploading files, the following restrictions and specifications must be followed:

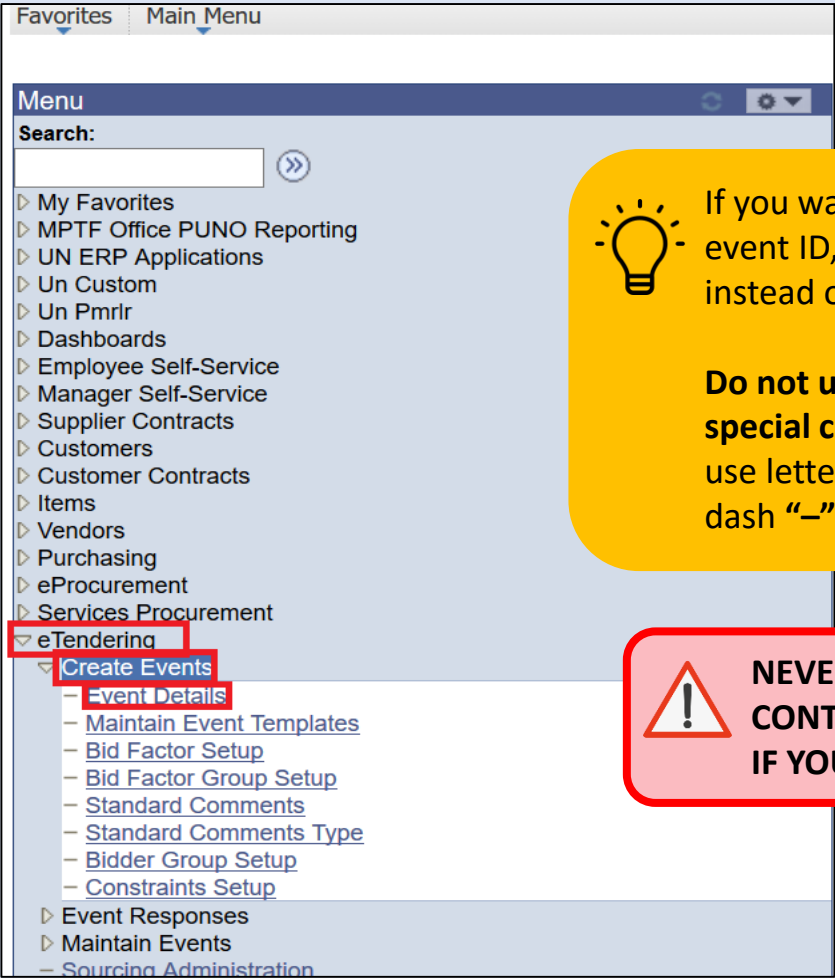
- File name can only contain 60 characters.
- File name and description cannot contain special characters and letters from other alphabets. It should only contain letters from the English alphabet.
- If you are uploading a large number of files (ex. 15 or more), please zip the files into a ZIP folder and upload the folder instead of each file individually. You can upload several ZIP folders, but if you do this, please note that the total size of each ZIP folder uploaded cannot exceed 50MB.
- Please read the solicitation documents of the event carefully to ensure that you are meeting the event requirements for document submission. **There may be restrictions on the size and format of the uploaded files.**



4.2 Create an Event - Begin Event Creation

1 To begin creating an event on eTendering go to **Main Menu** → **eTendering** → **Create Events** → **Event Details**.

2 To add an event, enter your Business Unit (BU). Leave the Event Format as “**Buy**” and Event Type as “**RFx**”. Then, click on “**Add**”.



If you want to customize the event ID, enter a unique ID instead of “NEXT”.

Do not use “/” or “\” or other special characters. You can use letters, numbers, and the dash “-” sign.

NEVER USE AN ID CONTAINING ONLY NUMBERS IF YOU MODIFY IT MANUALLY

A screenshot of the 'Create Events' form in the Atlas Finance system. The form is titled 'Create Events' and has a 'Welcome Dalal Abdulla' banner at the top. The breadcrumb trail shows 'Main Menu > eTendering > Create Events > Event Details'. There are two buttons: 'Find an Existing Value' and 'Add a New Value'. The form fields are: 'Business Unit' (UNDP1), 'Event ID' (NEXT), 'Event Round' (1), 'Event Version' (1), 'Event Format' (Buy), 'Event Type' (RFx), and 'Proxy Bidding (Auctions Only)' (Disabled). The 'Add' button is highlighted with a red box. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

Click to return to Launch a Tender Main Page

4.2 Create Event – Main Event Creation Page

- 3 Once you have created the Event ID, selected the Event type and clicked on **“Add”** you will be taken to the Main Event Page.

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	Preview Date: 12/02/2018 8:55AM EST
Event Status: Open	*Start Date: 12/02/2018 8:55AM EST
*Event Name: <input type="text"/>	*End Date: 05/03/2018 8:55AM EST
Descr: <input type="text"/>	Copy From: <input type="text"/> <input type="button" value="Go"/>
	Event Method: <input type="text"/>

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.

Related Links:

[Document Status Inquiry](#) [Plan Task Associations](#)

From the event main page, buyers can create an event in 5 different ways:

1. [Create an event copying from an eTendering Template](#)
2. [Create an event copying from another event](#)
3. [Create an RFP](#)
4. [Create an event with LOTs](#)
5. [Create an RFI](#)



Pay attention to the type of event you are launching. If you know that your event will have LOTs or is an RFP, you must follow an additional set of steps during event creation to set up the event on eTendering. Click on the relevant link above for further instructions.



Click to return to Launch a Tender Main Page

4.2 Create Event – Enter Basic Event Details

Once the Event ID is created you can begin to amend the event summary from the Event Main page.

[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: ITB - eTendering User Guide - 2018	Preview Date: 08/03/2018 5:39AM EST
Descr: Section 1 - Letter of invitation	*Start Date: 08/03/2018 5:39AM EST
The United Nations Development Programme (UNDP) hereby invites you to submit a bid to this invitation to	*End Date: 29/03/2018 5:39AM EDT
	Copy From: <input type="text"/> <input type="button" value="Go"/>
	Event Method: ITB

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

- **Event name:** The title of the bidding process as per the solicitation document. Use only English characters.
- ***Descr:** Event description, usually a copy of the front page of the solicitation document.
- **Preview Date:** Date which the bidder will be able to see the event in eTendering different in case the buyer wants to post clarifications etc. before the bidders are able to bid on the event.
- **Start date:** The date on which the bidder is able to start posting their bids in eTendering.
- **End date:** The deadline for submission of bids. **Be aware system time is based on NY timezone.**
- **Event Method:** specify if it is ITB, RFP, RFQ, IC, or Other. Does not change workflow, will serve only for statistics.

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



The text entered in the Description box will be included in the system email notification that is sent to invited and/or subscribed bidders. It is therefore recommended to include any important information that you would like to share with bidders at the invitation stage here.



4.2 Create an Event: Event Settings & Options

The next step is to define **the event basics**, which are general settings that control how the bidders can submit their bids.

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](#)

Click on ***Event Setting and Options** to start defining event settings

Create an Event

Event Settings and Options

Business Unit: UNDP1 Event ID: NEXT 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:

Go To:

Go

Save Event Changes

- The following 3 event settings are available:
- 1. Bid required on all Lines:** Enables or disables partial bidding. If checked bidders will not be able to submit their bid unless it contains price information for all line items. If unchecked, partial bidding is allowed.
 - 2. Alternate Bids Allowed:** Allows bidder to submit multiple bids in the system.
 - 3. Allow edit of posted bids:** It is recommended to not allow editing of bids. If a bidder needs to modify a bid after posting, they must first withdraw the bid and then submit a new one.

When all selections are made, click **“Save Event Changes”** and the **“Return to Event Overview”**.



Click to return to Launch a Tender Main Page

4.2 Create an Event - Payment Terms & Contact Info

Next, go to ***“Payment Terms and Contact Info”***

Step 1: Define Event Basics

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

[* Event Settings and Options](#)

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

Payment Terms and Contact Info

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

- ✓ **Currency:** The default event currency is USD. To use another main event currency, press on the loop and select desired currency.
- ✓ **Allow bids in other currencies:** If bids are allowed in multiple currencies, check this box. System will allow bidders to bid in any currency. To restrict bid currency to only 2, instruct bidders so in the BDS document.
- ✓ **Contact details:** Adding an email contact for the solicitation process that will be visible for the bidders is optional but recommended

Create an Event

Event Contact Details

Payment & Currency Information

*Currency: USD Exchange Rate

Pay Method: EFT

Payment Terms: 30

Bill Addr: UNDP1

Buyer: dalal.abdulraz:

*Rate Type: UNORE

Rate Date: 29/03/2018

☐ Allow bids in other currencies

☐ Tax Exempt

Event Contact

Contact Name: Dalal Abdulrazzaq

Email ID: dalal.abdulrazzaq@undp.org

Phone:

Save Event Changes

GoTo: Go

[Return to Event Overview](#)

When all selections are made, click ***“Save Event Changes”*** and then ***“Return to Event Overview”***.



Click to return to Launch a
Tender Main Page

4.2 Create an Event – Add Event Comments & Attachments

Next, click on “**Event Comments and Attachments**”.

Step 1: Define Event Basics

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

[* Event Settings and Options](#)

[Payment Terms and Contact Info](#)

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

You can upload all tender documents, including returnable forms which bidders will be able to access from their portal.

To add new attachments, click on “**Add Attachment → Browse**”. Select the file you want to upload. Then, click on “**Upload**”.

The screenshot shows the 'Create an Event' interface. The 'Event Header Comments and Attachments' section is active. The 'Event ID' is 'NEXT'. The 'Enter Comments' section has a text area and navigation buttons. Below the text area are checkboxes for 'Send To Bidder' and 'Include On Award'. The 'Add Attachment' button is highlighted with a red box. A modal window titled 'Select File to create as Attachment' is open, showing the 'Browse...' button highlighted with a red box, and the 'Upload' button highlighted with a yellow box. The modal also displays 'No file selected.' and a 'Cancel' button.



Click to return to Launch a
Tender Main Page

4.2 Create Event – Add Attachments

Step 1: Define Event Basics

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

[* Event Settings and Options](#)

[Payment Terms and Contact Info](#)

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

In order to view the attachment, click the magnifying glass

To remove an attachment, press the minus sign.

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

OK Cancel Refresh

When all attachments are reviewed and added, click **“OK”**.

When uploading files, please take note of the following fields :

- ✓ **Attachment Description:** Add a brief description of the file here.
- ✓ **Display to Bidder:** If this is checked, the document can be viewed by the bidder. If not, it is only viewable by UNDP buyers.
- ✓ **Include on Award:** If this is checked, the file will be automatically attached to the Purchase Order if created from eTendering.
- ✓ **Include in Notifications:** If this is checked, the file will be included on any automatic notifications that are sent to bidders, including bidders who accepted invitations after the event is created.
- ✓ **Confidential:** If this box is ticked, the document will only be visible to UNDP Users and cannot be seen by bidders. If ticked, the other options will not be selectable.



Important Please be aware of the file size when you check **“Include in notifications”**. Email server restrictions may prevent the system from sending email notifications if the total size of files selected exceeds email server restrictions from UNDP’s or bidder’s end.



4.2 Create an Event – Event Header Bid Factors

The next step is to review and add the **bid factors** of the event.

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](#)

Bid factors are questions that bidders will be asked when they submit their bid. The bid factors can be used in different ways, for example:

- To highlight event requirements, such as listing all mandatory documents that bidder must submit so they are reminded at bid submission stage.
- To highlight main eligibility requirement, such as not being in vendor sanctioned list, accepting UNDP GTCs, etc. and have bidder confirm their acceptance directly in the system.
- To gather information for the evaluation, such as the company description, delivery dates, transport methods, etc.

6 Types of Bid Factors available

Yes/No: This is the most common type of Bid Factor. Bidders can select Yes or No as response. **Note:** Using Yes/No bid factors as it simplifies how bidders respond and the evaluation committee can compare answers more easily.

Text: The bidder will have a comments box to enter their response. **Never select “Ideal Response Required” for this type of bid factor.**

Date: The bidder will enter a date, for instance: date of availability, or delivery date.

Monetary: The bidder will enter a monetary value as response.

List: The buyer will set up a list of options that the bidder can select as their response.

Numeric: Bidders enter a number as response.

Separator: This is not a question, but will appear as a Header. It can be used to organize the questions, for example into sections of technical, general, and eligibility requirements.



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




Click to return to Launch a
Tender Main Page

4.2 Create an Event – Event Header Bid Factors

If you have started creating an event by [copying from a template](#), there may be bid factors that are automatically transferred to the event bid factor section. If you wish to remove any of these bid factors, you may do so by clicking on the **minus sign** next to the bid factor

To add new Bid Factors, click on the **plus sign** next to an existing bid factor. A blank bid factor will be added below.

To search for and add pre-populated Bid Factors to your event, click on the magnifying glass .

If any existing Bid Factors are used, **please review them** to make sure all details are correct and corresponding to the specific bidding process.

If none of the existing Bid Factors meet the need of the specific event, it is possible to create a new one by entering the information manually.

Which Bid Factors to Include and How Many?

It is up to the procurement office to determine what bid factors to use for each event. This has to be determined based on the specifics of each case and also on the familiarity of potential bidders with the system. More bid factors facilitate the evaluation process and makes it easier for UNDP to assess bids received, but on the other hand, make it more cumbersome for bidder to complete their bid.

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](#)

Create an Event

Event Bid Factors

Event ID: NEXTBid Factor Weighting Total:Remaining Bid Factor Weight: 100.00000

Seq Nbr: 1

*Bid Factor: AVAILABILITY_IC

Type: Yes/No

Weighting: 0.00000

+

-

Question: Do you confirm that , in compliance with the requirements of the Terms of Reference, you are available for the entire duration of the assignment, and you shall perform the services in the manner

Yes/No

Yes

No

Display Bid Factor?

Bid Factor Response Required

Ideal Response Required

Include on Contract

Cost Contribution

Add Clauses To Bid Factor

Select for deletion

Seq Nbr: 2

*Bid Factor:

Type:

Weighting: 0.00000

+

-

Question:

Best: 0.000000

W

Select for deletion

Add Bid Factors by Group

Select Bid Factors

Bid Factor Weighting Total:

Save Event Changes

Look Up Bid Factor

SetID: UNDP1

Bid Factor Code: begins with

Bid Factor Type: =

Description: begins with

Look Up

Clear

Cancel

Basic Lookup

Search Results

View 100First1-102 of 102Last

Bid Factor Code	Bid Factor Type	Description
AUDIT REPORT	Yes/No	Audit Report
AVAILABILITY_IC	Yes/No	Availability Confirmation - IC
BANK REFERENCES	Text	List of Bank References

4.2 Create an Event – Event Header Bid Factors

For each Bid Factor, amend the question as necessary, and indicate whether the question requires a mandatory response (**bid factor response required**) or if a an **ideal response is required**.

Create an Event

Event Bid Factors

Event ID: NEXT Bid Factor Weighting Total: 100.00000
Event Name: Test Remaining Bid Factor Weight: 100.00000

Bid Factors

Seq Nbr:	*Bid Factor:	Type:	Weighting:
1	PRICESCHEDULE	Yes/No	0.00000

Question: Have you provided Price and Delivery Schedule form: Fully completed and duly authorized?

Display Bid Factor? ☒ **Bid Factor Response Required** ☒ **Ideal Response Required** ☒ **Include on Contract** ☐

Yes/No ☒ Yes ☐ No

Cost Contribution

[Add Clauses To Bid Factor](#)

☐ Select for deletion

[Add Bid Factors by Group](#) [Select Bid Factors](#) [Delete Selected Rows](#)

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

[Save Event Changes](#) Go To: Go

When all Bid Factors are added and reviewed as needed, click **Save and Return to Event Overview**



Click to return to Launch a
Tender Main Page

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](#)

For each Bid Factor, there are several response options

The most important ones are:

Bid Factor Response Required: If this box is ticked, the bidders have to reply to the question to be able to submit their bid. If they do not reply, an error message will be displayed and they cannot submit the bid.

Ideal Response Required: If this box is ticked, bidders are required to reply with the same answer as the one that the UNDP procurement focal point has indicated as ideal. If they don't reply the correct answer, an error message will be displayed and they cannot submit their bid.



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

4.2 Create an Event – Event Header Bid Factors

Tips for setting up different types of Bid Factors

1. Yes/No Responses – This type of bid factor is to be used with a straight forward question that can be answered with a simple yes or no. **Formulate the question so the desired answer is Yes.** For example, ask “Do you confirm that you are not on the vendor sanctioned list.....?” rather than “Are you on the vendor sanctioned list....?”

The screenshot displays the 'Create an Event' interface for setting up a bid factor. The 'Seq Nbr' is 3, and the '*Bid Factor' is 'ELIGIBILITY'. The 'Type' is set to 'Yes/No', and the 'Weighting' is 0.00000. The 'Question' field contains the text: 'Do you confirm that that you are not on the vendor sanctioned list?'. Below the question, there are radio buttons for 'Yes' (selected) and 'No'. To the right of the question, there are checkboxes for 'Display Bid Factor?' (checked), 'Bid Factor Response Required' (checked), 'Ideal Response Required' (checked), and 'Include on Contract' (unchecked). At the bottom left, there is a 'Cost Contribution' bar and a 'Select for deletion' checkbox. At the bottom right, there is a link 'Add Clauses To Bid Factor'.



Pay attention to the formulation of the bid factor. Is it an open-ended question to ask bidders, does it require an ideal response such as yes or no, is it an instruction, request for information, etc.?



THE MOST COMMON AND SIMPLE BID FACTOR TYPES ARE YES/NO AND TEXT. Avoid using other types of bid factors until you are familiar with how they can be used.



4.2 Create an Event – Event Header Bid Factors

Tips for setting up different types of Bid Factors:

2. Text Responses – this type of bid factor can be used to collect information from the bidder. For example *“Please provide transport arrangements setup and itinerary”*
Never use “Ideal Response Required” for text type of bid factors.

Seq Nbr: 3

*Bid Factor: BANK_REFERENCES

Type: Text

Weighting: 0.00000

Question: Provide List of Bank References (Name of Bank, Location, Contact Person and Contact Details).

☒ Display Bid Factor?

☒ Bid Factor Response Required

☐ Ideal Response Required

☐ Include on Contract

Ideal:

Cost Contribution

[Add Clauses To Bid Factor](#)

☐ Select for deletion



4.2 Create an Event – Event Header Bid Factors

Tips for setting up different types of Bid Factors:

3. Date – this can be used for bidders to provide a specific date, e.g. promised delivery date. We can indicate what is maximum acceptable (worst) and what is preferred (Best). If an **“Ideal response is required”** the system will accept only answers that match what was indicated as “Best”. Recommended to not use **“Ideal Response required”** for this type of bid factor.

The screenshot shows the configuration for a bid factor. At the top, 'Seq Nbr:' is 3, '*Bid Factor:' is 'DELIVERY_TIME', 'Type:' is 'Date' (highlighted with a red box), and 'Weighting:' is '20.00000'. Below this, the 'Question:' field contains 'What is your delivery time?'. To the right of the question are three checkboxes: 'Display Bid Factor?' (checked), 'Bid Factor Response Required' (checked), 'Ideal Response Required' (unchecked), and 'Include on Contract' (unchecked). At the bottom, 'Best:' is '25/03/2018' and 'Worst:' is '30/04/2018' (both highlighted with a red box). Below these fields is a blue bar with 'Cost Contribution'. At the bottom right is a link 'Add Clauses To Bid Factor'. At the bottom left is a checkbox 'Select for deletion'.

Seq Nbr:	3	*Bid Factor:	DELIVERY_TIME	Type:	Date	Weighting:	20.00000
Question:	What is your delivery time?			<input checked="" type="checkbox"/> Display Bid Factor?			
				<input checked="" type="checkbox"/> Bid Factor Response Required			
				<input type="checkbox"/> Ideal Response Required			
				<input type="checkbox"/> Include on Contract			
Best:	25/03/2018	Worst:	30/04/2018				
Add Clauses To Bid Factor							
<input type="checkbox"/> Select for deletion							



4.2 Create an Event – Event Header Bid Factors

Tips for setting up different types of Bid Factors:

4. Numeric – this can be used for bidders to provide specific numeric information, .eg. Delivery time in days/weeks, weight or volume of cargo, etc. We can indicate what is maximum acceptable (worst) and what is preferred (Best). If **“Ideal response is required”** the system will accept only answers that match what was indicated as **“Best”**. It is recommended to not use **“Ideal Response required”** for this bid factor.

Seq Nbr: 3

*Bid Factor: WARRANTY

Type: Numeric

Weighting: 30.00000

Question: What is the length of Product warranty offered on this product?

☒ Display Bid Factor?
☒ Bid Factor Response Required
☐ Ideal Response Required
☐ Include on Contract

Best: 5.000000

Worst: 1.000000

UOM: A

Cost Contribution

[Add Clauses To Bid Factor](#)

☐ Select for deletion

[Add Bid Factors by Group](#) [Select Bid Factors](#) [Delete Selected Rows](#)



Click to return to Launch a Tender Main Page

4.2 Create an Event – Event Header Bid Factors

Tips for setting up different types of Bid Factors:

5. Monetary – this can be used for bidders to provide monetary information. E.g. annual turnover. We can indicate what is minimum acceptable (worst) and what is preferred (Best). If **“Ideal response is required”** system will accept only answers that match what was indicated as “Best”. It is recommended to not use **“Ideal Response required”** for this type of bid factor.

The screenshot shows a web form for creating a bid factor. The 'Seq Nbr' is 3. The '*Bid Factor' field contains 'FINANCIAL_PROPOSAL'. The 'Type' is set to 'Monetary', which is highlighted with a red box. The 'Weighting' is 0.00000. The 'Question' field contains the text: 'The financial proposal of technical compliant bids. Best and Worst to be completed based after financial proposals are opened.' To the right of the question are four checkboxes: 'Display Bid Factor?' (unchecked), 'Bid Factor Response Required' (unchecked), 'Ideal Response Required' (unchecked), and 'Include on Contract' (unchecked). Below the question, the 'Best' and 'Worst' values are both set to 0.000000, and this row is highlighted with a red box. At the bottom, there is a blue button labeled 'Cost Contribution' and a link 'Add Clauses To Bid Factor'. A checkbox for 'Select for deletion' is at the bottom left.

Seq Nbr:	3	*Bid Factor:	FINANCIAL_PROPOSAL	Type:	Monetary	Weighting:	0.00000
Question:	The financial proposal of technical compliant bids. Best and Worst to be completed based after financial proposals are opened.						
Best:	0.000000	Worst:	0.000000				



Click to return to Launch a
Tender Main Page

4.2 Create an Event – Event Header Bid Factors

Tips for setting up different types of Bid Factors:

6. List – this create a list of options for bidders to select as answers. They can be set as multiple choice, or single choice. If ideal response required is selected, bidders must select precisely the option(s) indicated by buyer during the setup of the event.

Seq Nbr: 3

*Bid Factor: FRAUD_CORRUPTION

Type: List

Weighting: 0.00000

Question: UNDP implements a policy of zero tolerance on proscribed practices, including fraud, corruption, collusion, unethical practices, and obstruction. UNDP is committed to preventing, identifying and

☒ Display Bid Factor?

☒ Bid Factor Response Required

☒ Ideal Response Required

☐ Include on Contract

Ideal: I have read, understood and accept UNDP Anti-Fraud Policy, I have read, understood

7. Separator – This is not a question to bidders. It serves simply as a header level. Can be used to group the bid factors by category It can be used to organize the questions, for example into sections of technical, general, and eligibility requirements.

Create an Event

Event Bid Factors

Event ID: NEXT

Event Name: test

Bid Factor Weighting Total:

Remaining Bid Factor Weight: 100.00000

Bid Factors

Seq Nbr: 1

*Bid Factor: SEP_ELIGIBILITY

Type: Separator

Weighting: 0.00000

Question: ELIGIBILITY REQUIREMENTS

☒ Display Bid Factor?

☐ Bid Factor Response Required

☐ Ideal Response Required

4.2 Create an Event – Configure Line Items

The next step is to set up the price schedule for the tender. It is highly recommended that a requisition is approved and copied to the event. When eReq is copied, information (including COA) is copied to PO as well. If no requisition is available, line items can be inserted manually directly.

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

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

Step 2: Configure Line Items

Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

Modify an Event

Line Items



Business Unit: UNDP1 Event ID: 0000000649 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: Go

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	695000	EA	1.0000	1.0000	\$1.00	0.00000	 

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

GoTo: Go

[< Return to Event Overview](#)

Save Event Changes

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

Delete Confirmation

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

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

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



Click to return to Launch a Tender Main Page

4.2 Create an Event – Configure Line Items

If you choose to copy a line from a requisition and later create the Purchase Order through eTendering, the requisition schedule will be automatically populated in the PO. To copy line items from a requisition, choose **“Copy From: Requisition”** and press **“Go”**.

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: Requisition **Go**

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								0.00000

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



Please note: The start price is used as the requisition price, or the estimated budget price. It is **not visible to bidders** and will not impact the price bidders can bid or be awarded.



Click to return to Launch a Tender Main Page

Step 2: Configure Line Items

Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

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

Modify an Event

Enter Copy Criteria

Copy Template

Copy From: Requisition

Select Criteria

Business Unit: UNDP1

*Copy Method: Append

*Select Lines: Req Lines

Copy Criteria

Req ID:

Buyer:

SetID:

Category:

Vendor SetID:

Vendor ID:

Item ID:

☐ Exclude Auto Source Item

☐ Stockless Item

☐ Copy all Req/RFQ lines

☐ Include Inventory Items

☐ Include Reqs With No Vendor

OK

Cancel

Refresh

4.2 Create an Event – Configure Line Items

Step 2: Configure Line Items

Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

Select the lines to copy and press “OK”.

Requisition Lines to Copy

☒ [Select All](#) ☐ [Deselect All](#)

Select Lines

Set	Item SetID	Item	Description	Quantity	UOM	Price	Currency	Due Date	Business Unit	Req ID	Vendor	Buyer	Ship To
<input checked="" type="checkbox"/>	SHARE	DSA	Daily Subsistence	1.0000	EA	269.00000	USD	20/06/2005	UNDP1	0000001504		cecilia.nymann	UNDP1
<input checked="" type="checkbox"/>	SHARE	TRM	Terminal	4.0000	EA	30.00000	USD	20/06/2005	UNDP1	0000001504		cecilia.nymann	UNDP1



Please note: It is possible to select and source specific requisition lines and to combine lines from different requisitions. Once a line has been sourced into an event, it is not possible to source it to another event unless the line is deleted from the event it was already sourced to.

When adding line items, please consider the following:

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



Click to return to Launch a
Tender Main Page

4.2 Create an Event – Configure Line Items

Step 2: Configure Line Items

Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

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:

Requisition

Go

Line Items

Personalize | Find | View All |

First

 1 of 1

Last

Basic Definition

Advanced Definition

Line	Item ID	Description	Item SetID	Details	Bid Factors	Constraints	
1	000000000000000010	Tape Dispenser Big ...	SHARE	<div>Details</div>	<div>Bid Factors</div>	No	<div></div> <div></div> <div></div>

Event Total: 420.0000 USD Line Weighting Total: 0 % Remaining Weight: 100 %

GoTo:

Go

< Return to Event Overview

Save Event Changes

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

To add line comments or attachments, click on the comments box



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



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



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



4.2 Create an Event Configure Line Items

It is possible to set specific rules for the quantity the bidder can bid for the item. To adjust and specify bidding quantities, navigate from **Step 2: Configure Line Items** → click on ***Line items**, click on “Advanced Definitions” tab, and then click on the **Details** hyperlink next to the corresponding Line item.

Create an Event

Line Details

Event ID: NEXT
Line: 1
Item ID: 000000000000000010
Description: Tape Dispenser Big

Requested Quantity:
Start Price:
Physical Nature:

Shipping Information

Schedule: 1
Quantity: 10.0000
Due Date: 02/04/2018
Ship Via:
Ship To: UNDP1
Ship From:
Freight Terms:
Min Quantity: 0.0000
Max Quantity: 10.0000
Bid Quantity Rule: Requested Quantity Required
Alternate Units of Measure: Not Allowed
☐ User Defined Price Breaks
☐ Bidder Defined Price Breaks

Bid Parameters

Reserve Price:
☐ Bid Required

Item Specification

Line Image

OK Cancel Refresh

Create an Event

Line Items

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

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

Copy From: Requisition Go

Line Items

Basic Definition Advanced Definition

Line	Item ID	Description	Item SetID	Details
1	000000000000000010	Tape Dispenser Big	SHARE	Details

Event Total: 420.0000 USD

The options available under Bid Quantity Rule are:

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



Always check the settings on this page, particularly when copying from an eRequisition as this may in some instances, have overridden the eTendering settings. For example, check if “**bid required**” box is checked, and whether min quantity and max quantity are correct, etc.



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

4.2 Create an Event: Invite Bidders


For the next step, click on “***Bidder Invitations**”

For Open Competitions

If the solicitation is an **open competition**, make sure that the box titled “**Public Event**” is checked. This will ensure that all bidders who are registered with eTendering will be able to view and bid on the event.

To alert potential companies directly

It is possible to alert identified companies when a tender is posted on eTendering by entering their email addresses during event creation. Doing this will prompt the system to send an email notification to the identified supplier that includes a hyperlink to eTendering, after which bidder must sign in to eTendering and search for and view the event. It is also possible for Buyers to enter their own email addresses so that they can receive the email notification and copy and paste the link in an email to forward to bidders.

To alert companies of an event directly, click on the icon  to add bidders email addresses and names as shown in the screenshots on the right.

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

* [Bidder Invitations](#)

Create an Event

Invite Bidders

Business Unit: UNDP1 Event ID: NEXT 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

[Personalize](#) | [Find](#) | [View All](#) | [First](#) 1 of 1 [Last](#)

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

[Save Event Changes](#)

[< Return to Event Overview](#)

GoTo: [Go](#)

Public Event Contacts

Setid: UNDP1 Bidder ID: PUBLIC_AUC

Contact	Contact Name	Email ID
1	Bidder Name	Biddername@example.com

[Personalize](#) | [Find](#) | [View All](#) | [First](#) 1 of 1 [Last](#)

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

4.2 Create an Event: Invite Bidders for Limited Competition

For limited competition tenders, the shortlisted bidders must be registered in the system before then can be invited. Once they are registered, you can invite them following the steps shown: click on “**Search for Bidders**”.

Under the field “**Bidder Type**”, select “**Bidder**”, then find company either by company name or Bidder ID. [Follow these instructions to find company name or bidder ID from the bidder database.](#)

You can also search for companies profiles here, click on the By company field and search for companies containing specific words.

Alternatively, you can search also for companies from a specific countries.

Select the bidder you would like to invite to the event and press “**Search**”. Tick the box named “**Invite**” for the appropriate vendor and click “**OK**”.

The invited bidder will be added to the list. Repeat the above steps for each Bidder until you have invited all shortlisted bidders. **Do not select “Public Event”, otherwise event will become visible to all bidders.**

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

Atlas Finance
Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 06.Apr.2018 20:20:20 GMT

Favorites Main Menu > eTendering > Create Events > Event Details

Bidder Search

Search Criteria

Bidder Type: Bidder

Company: [text box]

ID: [text box]

Contact: [text box]

Group ID: [text box]

Group Name: [text box]

State: [text box]

City: [text box]

Country: [text box]

SIC Type: [text box]

SIC Code: [text box]

Postal: [text box]

Recommend Bidders

Maximum Rows retrieved: 50

Search

OK Cancel Refresh

Look Up Company

SetID: UNDP1

Company Name: contains [text box]

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-5 of 5 Last

Company Name

Koxhaj Roland

ROLAND PSO TEST

ROLANDPSO

Roland Afg

Roland Berger Strategy Consultants



Favorites Main Menu > eTendering > Create Events > Event Details

Create an Event

Invite Bidders

Business Unit: UNDP1 Event ID: 0000001988 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Public Event

Select	Bidder ID	Bidder Type	Name	Dispatch Method
<input type="checkbox"/>	0000000010	Bidder	Roland Koxhaj	Email
<input type="checkbox"/>	0000001381	Bidder	Europe Tower Logistic Services Co	Email
<input type="checkbox"/>	0000001390	Bidder	United Network Construction Dev. Company	Email

Search for Bidders Dispatch Lines Save Bidders as Group

Save Event Changes

< Return to Event Overview

GoTo: [text box] Go

Refresh Add Update/Display

4.2 Create an Event – Invite Collaborators (Optional)

Step 4: Invite Collaborators

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

[Event Collaborators](#)

The **Invite Collaborators** feature is an optional step in event creation that can be used to invite other users (without access to eTendering, e.g. a technical expert or project manager) to contribute to the creation of the event. It is a pre-requisite that invited collaborators are familiar with eTendering. The Buyer will have to review the input provided and decide to accept or reject each change. This is a very advanced feature and requires specialized knowledge to be used. Before using this feature, users must train themselves in the training site.

A simpler method to share the event setup and have reviewers contribute is by sharing the [XML/PDF file generated by the system](#).

To preview the system generated PDF-file that summarizes the event and will be sent to invited bidders, click **“Preview PDF”**. This will generate an email to the event creator with two files, one PDF, and another XML file that can be opened and modified in Excel.

Step 5: Post Event

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

Save Even

Post

Save As Template

Preview PDF



Click to return to Launch a
Tender Main Page



4.2 Create an Event : Post Event for Approval

All steps of the event have now been completed you can now post the event for approval.

Step 5: Post Event

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

Save Even

Post

Save As Template

Preview PDF

Approver List

Remember to save your event as you complete each step and before posting for approval

To post the event for approval, click **“Post”**.

To see all the approvers in a Business Unit, click on **“Approver List”**. All approvers listed here will receive an automated email from eTendering when the event is posted for approval.

It is possible to copy and paste the **Approval URL** that appears after clicking **Approver List** onto an email to share the link to approve an event directly with the approvers.



Important: Once an event is posted for approval, the buyer cannot make amendments to the event version unless it is approved the approving manager. **Please also note that the amendments made will not be visible to bidders until it has been approved by the manager.**

Approver Email ID List	
Email	Personalize Find View All 1-10 of 15 First Last
Email ID	
1	DaCosta.bayley@undp.org
2	Ferouze.Mohamed@undp.org
3	adenike.akoh@undp.org
4	arvis.vilcins@undp.org
5	bakhtiyor.khamraev@undp.org
6	dalal.abdulrazzaq@undp.org
7	diego.zapatero@undp.org
8	emma.barredo@undp.org
9	keith.jarrett@undp.org
10	madhu.vegunta@undp.org

Approval URL:

https://finance-test.partneragencies.org/psc/UNDPFSS1/EMPLOYEE/ERP/c/AUC_ADMINISTRATION.AUC_WF_APPROVAL.GBL?Page=AUC_WF_APPROVAL&Action=U&BUSINESS_UNIT=UNDP1&AUC_ID=0000001978&AUC_ROUND=1&AUC_VERSION=1

Return



Click to return to Launch a Tender Main Page

4.3 Approval of events and amendments

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

Worklist
Worklist for dalal.abdulrazzaq: Dalal Abdulrazzaq

[Detail View](#) Worklist Filters: Approval Routing Feed

Worklist Items						Personalize Find View All		First 1-2 of 2 Last	
From	Date From	Work Item	Worked By Activity	Priority	Link				
Roland Koxhaj	22/01/2018	Approval Routing	Approval Workflow	2-Medium	Event Approval, 39411, Event ID 0000001957 is awaiting approval.	Mark Worked	Reassign		
Roland Koxhaj	14/02/2018	Approval Routing	Approval Workflow	2-Medium	Event Approval, 39571, Event ID 0000001973 is awaiting approval.	Mark Worked	Reassign		

Approving managers can choose to:

- **Approve:** this action will publish the event, taking into consideration the Preview and Start Date.
- **Deny:** this action will send the event back to the Event Creator for making necessary changes.
- The approver can include comments in the box named **Approval Comments**. Buyer can see these comments by [going to the Approval History](#). It is recommended however that approver shares any comments via regular email.

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



Please Note: While it is possible to have Event Creator and Event Approver rights at the same time, it is not possible for a person to approve the same event that they have created.

Review/Edit Approvers

Event Approval

Approval Status: **Pending** [View/Hide Comments](#) [Start New Path](#)

Event Approval

Skipped
Roland Koxhaj
UN Event Approver
14/02/18 - 9:40 AM

Pending
Multiple Approvers
UN Event Approver

Comments

Approval Comments

Approve **Deny**



Click to return to Launch a Tender Main Page



4.4 Publish Procurement Notice

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

The text of the procurement notice for events launched on eTendering is the same as usual. The main difference is that the Bidder User Guide should be attached to the notice, and the following paragraph should be added to introduce eTendering to the bidders



Important: Even if a tender has been launched on eTendering, the Procurement Notice must still be published as per the POPP, in the same way as it is done if the tender is not handled through eTendering.



Click to return to Launch a Tender Main Page

Dear Bidder,

[Brief description of the tender and main scope of requirements..... then add text below]

Please note that this procurement process is being conducted through the online tendering system of UNDP. Bidders who wish to submit an offer must be registered in the system. Visit this page for system user guides and videos in different languages:

<http://www.undp.org/content/undp/en/home/operations/procurement/business/procurement-notices/resources/>

If already registered, go to <https://etendering.partneragencies.org> and sign in using your username and password.

Use “Forgotten password” link if you do not remember your password. Do not create a new profile.

If you have never registered in the system before, you can register by visiting the link below and follow the instructions in the user guide (attached):

<https://etendering.partneragencies.org>

- **Username:** event.guest
- **Password:** why2change

It is strongly recommended to create a username with two parts: your first name and last name separated by a “.”, (similar to the one shown above). Once registered you will receive a valid password to the registered email address which you can use for signing in and changing your password.

Please note that your new password should meet the following criteria:

- Minimum 8 characters
- At least one UPPERCASE LETTER
- At least one lowercase letter
- At least one number

You can view and download tender documents with the guest account as per the above username and password, However, if you are interested to participate, you must register in the system and subscribe to this tender to be notified when amendments are made.

4.4 When to amend the original Procurement Notice

For basic event amendments, such as adding attachments to the event after it is published (ex. adding pre-bid meeting minutes), it is not necessary to amend the original Procurement Notice.

If a deadline is extended however, the procurement notice must be amended to reflect the new tender deadline.

The following categories of bidders will receive automatic notifications from eTendering [anytime an amendment is modified](#):

- Bidders who have been directly invited to the event by UNDP.
- Bidders who have accepted the invitation for the particular event (please see Bidder User Guide for more information). **Note: *Because of this, UNDP Buyers should encourage bidders to accept the invitation to all events in which they are interested in. This does not bind the bidder to submit a bid, but subscribes them for notification in case of any changes.***
- Bidders who have submitted a bid on the particular event.



Important: To encourage bidders to register to the system and retrieve solicitation documents at an early stage, it is recommended to not upload the solicitation documents in the procurement notice. This will also enable buyers to view the interest and participation during the bidding period, and hence provide important information that help make a decision on whether an extension is required due to low participation.



4.5 Create an Event from a Template

1

Users are recommended to use the “Copy from Template” function. It streamlines the event creation process and helps with standardizing the events.

To copy an event from a template, go to the Event Summary, and from the field “**Copy From**”, select “**Sourcing template**” → Click “**Go**”.

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

Event Method:



Click to return to Launch a
Tender Main Page

4.5 Create an Event from a Template

2

To search for a specific template, enter the following copy criteria:

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

Click on the magnifying glass to search and view available templates.

Create an Event

Enter Copy Criteria

Copy Template

Copy From:

Select Criteria

Business Unit:

*Copy Method:

Event Type:

Copy Criteria

Template\Event ID:

OK

Cancel

Refresh



4.5 Create an Event from a Template

- 3 Select the template you would like to use by clicking “**OK**” on the relevant Event ID.

Look Up Template\Event ID

Business Unit:UNDP1

Event Format:Buy

Event Type:RFx

Event ID:begin with

Template Type:=

Template ID:begin with

Template Description:begin with

Look Up

Clear

Cancel

Basic Lookup

Search Results

View 100

First1-7 of 7Last

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)
0000000048	Bus Unit	RFQ SIM V1	(blank)

- 4 To copy a line item from the selected template, check the box next to the line item under “**Select Lines**” then click on “**OK**”.

Event Lines to Copy

☒ Select All

☐ Deselect All

Select Lines

PersonalizeFindView All

First1 of 1Last

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		

OK

Cancel

Refresh



4.5 Create an Event from a Template

5

Once you have copied line items from a template, click on “***Return to Event Overview***”.

Create an Event

Line Items

Business Unit: UNDP1 Event ID: 0000000649 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: Sourcing Template Go

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	695000	LO	1.0000	1.0000	\$1.00	0.00000	+ -

Event Total: 1.0000 USD Line W

GoTo: Go

[< Return to Event Overview](#)

Save Event Changes

Refresh



Once you have completed these steps, [click here](#) to begin setting up the rest of your event details

When a line item is deleted, the line item # is deleted and cannot be used anymore, for example, it will start at #2 instead of #1. To avoid this from happening when copying line items from templates, follow these steps:

1. Copy line item together with template. Do not save.
2. Delete the line item that came from template.
3. Only then, copy items from eReq, or add directly as needed. Now event can be saved and line item # sequence will be maintained.



To delete a line item, click on the **minus sign** to the right side of the line item. To add a line item, click on the **plus sign**.

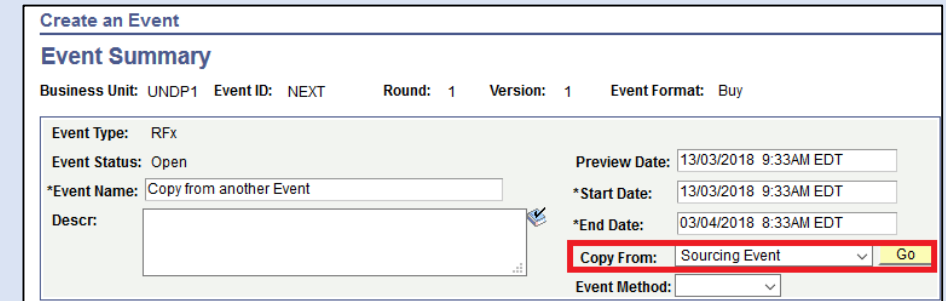


Click to return to Launch a
Tender Main Page

4.6 Copy from Another Event

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

To do this, follow the same [steps for event creation](#), except at the Event summary, select “**Sourcing Event**” from the “**Copy From**” menu.

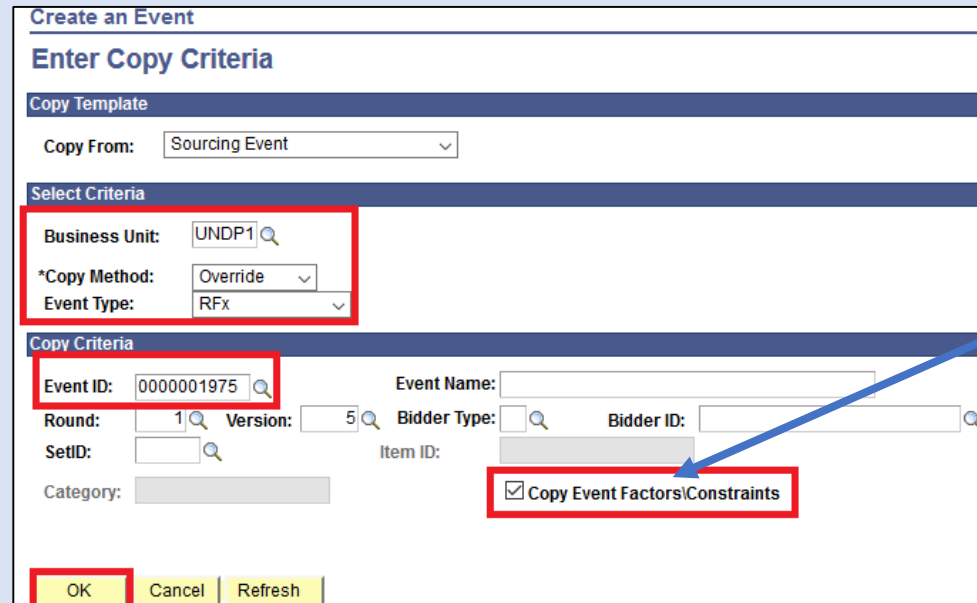


Create an Event
Event Summary
Business Unit: UNDP1 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy

Event Type: RFx
Event Status: Open
*Event Name: Copy from another Event
Descr:

Preview Date: 13/03/2018 9:33AM EDT
*Start Date: 13/03/2018 9:33AM EDT
*End Date: 03/04/2018 8:33AM EDT

Copy From: Sourcing Event **Go**
Event Method:



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: 0000001975
Round: 1 Version: 5
Bidder Type: Bidder ID:
SetID: Item ID:
Category:

☒ Copy Event Factors/Constraints

OK Cancel Refresh

Select the following copy criteria:

- ✓ Business Unit: **Same as the event you want to copy**
- ✓ Copy Method: **Override**
- ✓ Event Type: **RFx**
- ✓ **Copy Event Factors/Constraints** is checked to copy bid factors as well.

Then, indicate the event ID you would like to copy from and click “**OK**”.

All the information from the previous event will be copied except:

- Preview Date and Start Date
- Text in the description box
- Attachments



4.7 Create an event for a Request for Proposal (RFP)

The current version of eTendering does not support a “Two envelope system”. This means that the system would allow bidders to put the financial information in the system, which then becomes visible to buyer when deadline passes.

When an RFP process is managed through eTendering bidders are instructed to **submit their financial proposal as a password protected PDF uploaded in the system, and in the system they must insert “1” in the line item unit price.**

In addition to the RFP solicitation document template, this instruction to bidders is captured in several instances as shown further below.



Please note: Use the RFP template modified for use with eTendering.



Click to return to Launch a Tender Main Page

If any of the eTendering RFP templates have been used when creating the eTendering event, the following Bid Factor will be included:

Bid Factors

Seq Nbr:	*Bid Factor:	Type:	Weighting:
1	FINANCIALPROPOSAL	Yes/No	0.00000

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

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

Yes/No

☒ Yes ☐ No

Cost Contribution

☐ Select for deletion

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

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

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

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

4.7 Create an event for a Request for Proposal (RFP)

In the Line item. Once you have created the line item (only 1 line for RFPs), edit the line item description to add this text ***“Financial Proposal – insert 1 in the system and upload password protected file”***.

Additionally, insert a more detailed instruction in the line item comments as shown in this screenshot. To add line item comments, go to ***“Step 2 Configure Line Items”*** → ***“Line Items”*** and then navigate to the ***“Advanced Definition”*** tab and click on the comments bubble. Tick “send to bidder” box to make the comment visible to bidders.

At the evaluation stage, the procurement office will formally request that bidders who pass the technical evaluation to provide the password for their financial proposal. The response from the bidders with the password, shall be saved as PDF and uploaded into eTendering under the evaluation process management feature.



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: Go

Line Items

Basic Definition Advanced Definition

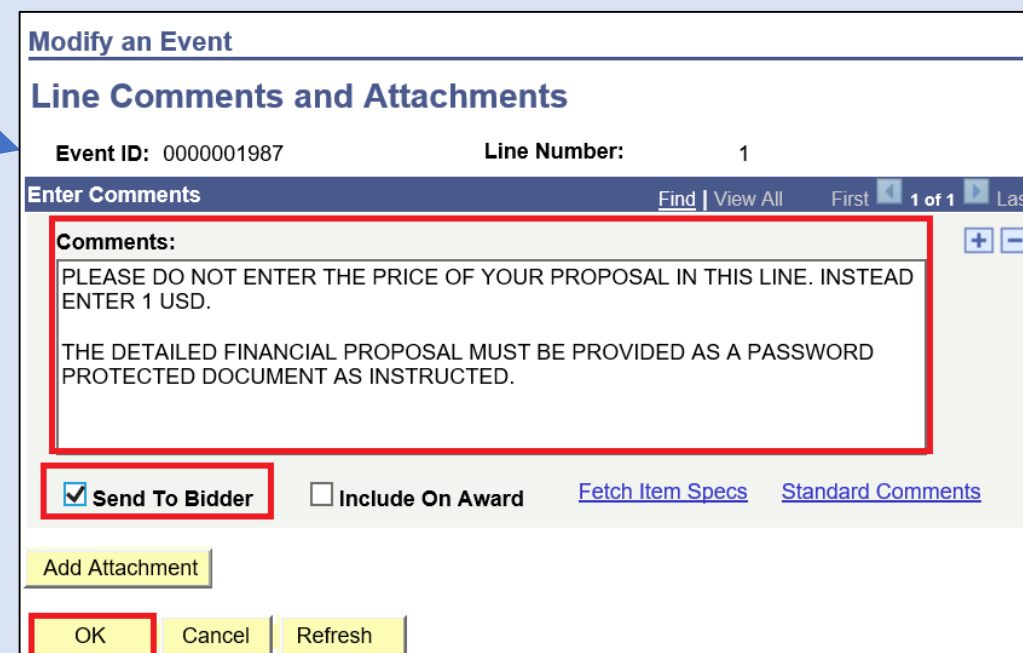
Line	Item ID	Description	Item SetID	Details	Bid Factors	Constraints	
1	82101801E	E) Advertising agency services FINANCIAL PROPOSAL - Insert 1 in the system. Upload proposal as password protected document.	SHARE	Details	Bid Factors	No	

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

GoTo: Go

[Return to Event Overview](#)

Save Event Changes



Modify an Event

Line Comments and Attachments

Event ID: 0000001987 Line Number: 1

Enter Comments Find View All First 1 of 1 Last

Comments:

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

THE DETAILED FINANCIAL PROPOSAL MUST BE PROVIDED AS A PASSWORD PROTECTED DOCUMENT AS INSTRUCTED.

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

Add Attachment

OK Cancel Refresh



Click to return to Launch a
Tender Main Page

4.8 Create an Event for ITBs with LOTs – Price schedules

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

To create the LOT event in eTendering, start by preparing a detailed price schedule where all items and quantities for each LOT are listed. To begin setting up the LOT event in eTendering, follow the same instructions on [how to create an event](#).

In the line Item description write **“LOT number – Description”** as per each case. Insert one line item per LOT. ***Additionally, add more detailed instructions in the line items comments box. See how to enter line item comments and show to bidders [here](#).***



Please note that the public bid opening is slightly differently for LOT event. Go [here](#) for more information.

Event Bid Factors

Event ID: 0000001987 Bid Factor Weighting Total: 100.00000
Event Name: test for guide Remaining Bid Factor Weight: 100.00000

Bid Factors			
Seq Nbr:	1	Bid Factor: LOTSCHEDULE	Type: Yes/No Weighting: 0.00000
Question:	Have you uploaded the detailed price schedule required for each LOT?		
		<input checked="" type="checkbox"/> Display Bid Factor? <input checked="" type="checkbox"/> Bid Factor Response Required <input checked="" type="checkbox"/> Ideal Response Required <input type="checkbox"/> Include on Contract	
<div>Yes/No <input checked="" type="radio"/> Yes <input type="radio"/> No</div> <div>Cost Contribution</div> <div>Add Clauses To Bid Factor</div> <div><input type="checkbox"/> Select for deletion</div>			

[Add Bid Factors by Group](#) [Select Bid Factors](#) [Delete Selected Rows](#)

Bid Factor Weighting Total: Remaining Bid Factor Weight: 100.00000

[Save Event Changes](#) GoTo:



4.8 Create an Event for ITBs with LOTs : Enter LOT Specifications

1) When configuring line items for a LOT event at [Step 2 of event creation](#), you must add one Line Item per LOT and then enter the quantity for each line item as 1.

Search and select the Line item ID that corresponds to the LOT by clicking on the magnifying glass. Thereafter, enter the start price and click on **“Save Event Changes”**.

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: 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	000000000000000005	LOT 1 - computer	749000	DOZ	1.0000	1.0000	\$1.00	0.00000
2	389190	LOT 2 - Stationery	389000	EA	1.0000	1.0000	\$1.00	0.00000

Event Total: 2.0000 USD Line Weighting Total: 0 % Remaining Weight: 100 %

3) Enter the LOT descriptions under the Comments box and then check the box **“Send To Bidder”** and click on **“OK”**.

2) Next, you will need to provide the LOT description for each LOT. To do this, click on the **“Advanced Definition”** tab, then click on the **comments bubble**.

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: Go

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

Basic Definition **Advanced Definition**

Line	Item ID	Description	Item SetID	Details	Bid Factors	Constraints
1	000000000000000005	computer	SHARE	Details	Bid Factors	No
2	321965	Paper stationery sets	SHARE	Details	Bid Factors	No

Event Total: 2.0000 USD Line Weighting Total: 0 % Remaining Weight: 100 %

Go To: Go

[Return to Event Overview](#)

[Save Event Changes](#)

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

Modify an Event

Line Comments and Attachments

Event ID: 0000001987 Line Number: 1

Enter Comments Find | View All | First 1 of 1 Last

Comments:

LOT 1 – Computers
Bidders must complete the detailed prices schedule for this LOT and upload it in the system as per the form provided with the solicitation documents. In the system, bidders must insert the total LOT price which must match with the total in the attached form.

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

[Add Attachment](#)

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

4.9 Create an event for Request for Information (RFI), Expression of Interest (EOI) and Prequalification of vendors

The key difference between an RFI type of event from and RFx type in eTendering is that in RFIs there are no line items and there is no award function.

To create an RFI, at the [start of Event Creation](#), select “**RFI**” from the **Event Format** drop-down menu, click on “**Add**” and then follow the same steps on how to [create an event from scratch](#)

Create Events

Find an Existing Value

Add a New Value

Business Unit:

UNDP1

Event ID:

NEXT

Event Round:

1

Event Version:

1

Event Format:

RFI

Event Type:

RFx

Proxy Bidding (Auctions Only):

Disabled

Add

No Line Items required

Create an Event

Event Summary

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

Event Type: RFx

Event Status: Open

*Event Name:

Descr:

Preview Date: 06/04/2018 7:43AM EDT

*Start Date: 06/04/2018 7:43AM EDT

*End Date: 27/04/2018 7:43AM EDT

Copy From:

Go

Event Method:

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

Step 2: Configure Event Bid Factors

Create line listings for this event.

* Event Bid Factors

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.

Save Even

Post

Save As Template

Preview PDF

Click to return to Launch a Tender Main Page

UNDP eTendering User Guide for Buyers (April 2018)

69

5.0 Make Tender Amendments & Manage Events



[Click to return to TOC](#)

This section will describe the various actions buyers can take during an ongoing bidding period to manage an event from the moment it is launched on eTendering up until the event closes. Topics covered include how to modify events that have been posted, how to track and view bidder participation while an event is open, how to view the event history (such as who modified the event and when), etc.

It also explains how to search for events and other useful event management features that can be accessed from the Event Workbench.

[5.1 Access Event Workbench](#)

[5.2 Search for events in the system](#)

[5.3 Make an amendment to an on-going tender.](#)

[5.4 How to make changes to line items and Bid factors \(Important\)](#)

[5.5 Updating Event Attachments](#)

[5.6 View approval status of an event](#)

[5.7 View Bidder participation history](#)

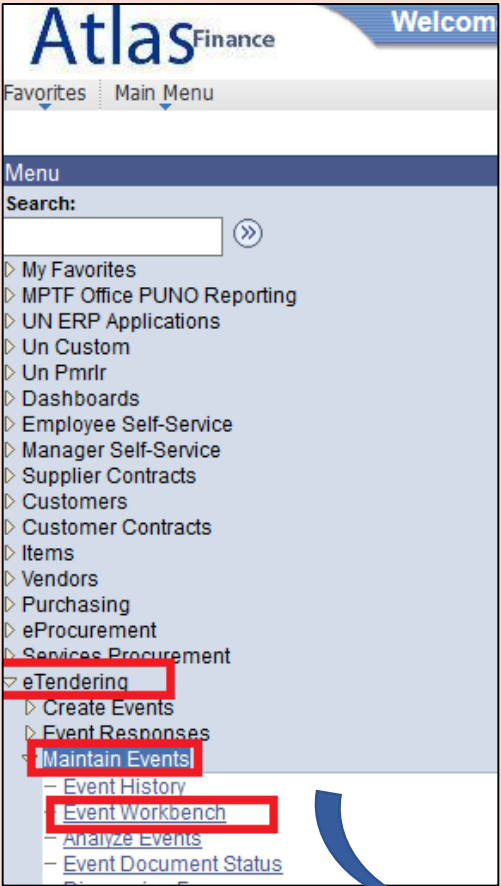
[5.8 View event history and changes](#)

[5.9 Cancel an event](#)

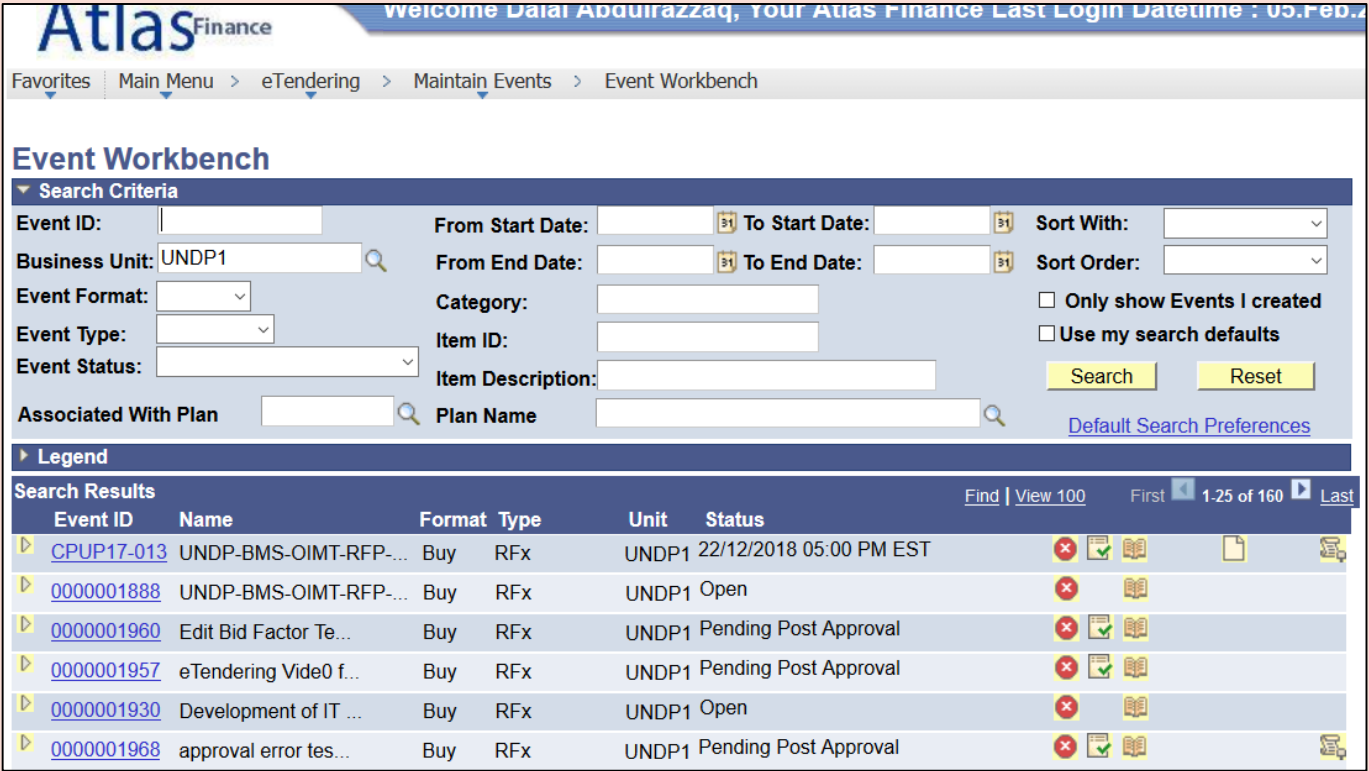
5.1 Access the Event Workbench

The starting point for any of the actions needed to manage an event on eTendering is the Event Workbench.

To access the Event Workbench, from ATLAS, navigate to **Main Menu → eTendering → Maintain Events → Event Workbench**.



Click to return to Manage Events main section



5.2 Search for Events in the System

All eTendering events for all Business Units are listed in the Event Workbench.

It is possible to search for the event you are working on by using the following filters:

- **Event ID** – to find a specific event.
- **Business Unit** – all events for a specific BU.
- **Event Start Dates** – events that have the start date within a specified range.
- **Event End Dates** – events that have the end date within a specified range.
- **Events created by you** (by checking the box “Only show Events I created”).
- **By type or status of events**, e.g. awarded events only.
- **By line item details (item ID, Description, or category)**. This can be useful to find examples of ToRs and specifications from other tenders.

Event Workbench

Search Criteria

Event ID: 197
Business Unit: UNDP1
Event Format:
Event Type:
Event Status:
Associated With Plan:
From Start Date:
To Start Date:
From End Date:
To End Date:
Category:
Item ID:
Item Description:
Plan Name:
Sort With:
Sort Order:
☐ Only show Events I created
☐ Use my search defaults
Search Reset
[Default Search Preferences](#)

Legend

Search Results

Event ID	Name	Format	Type	Unit	Status
0000001973	UNDP eTendering Us...	Buy	RFx	UNDP1	Event Completed
0000001970	test event	Buy	RFx	UNDP1	06/03/2018 11:21 AM EST



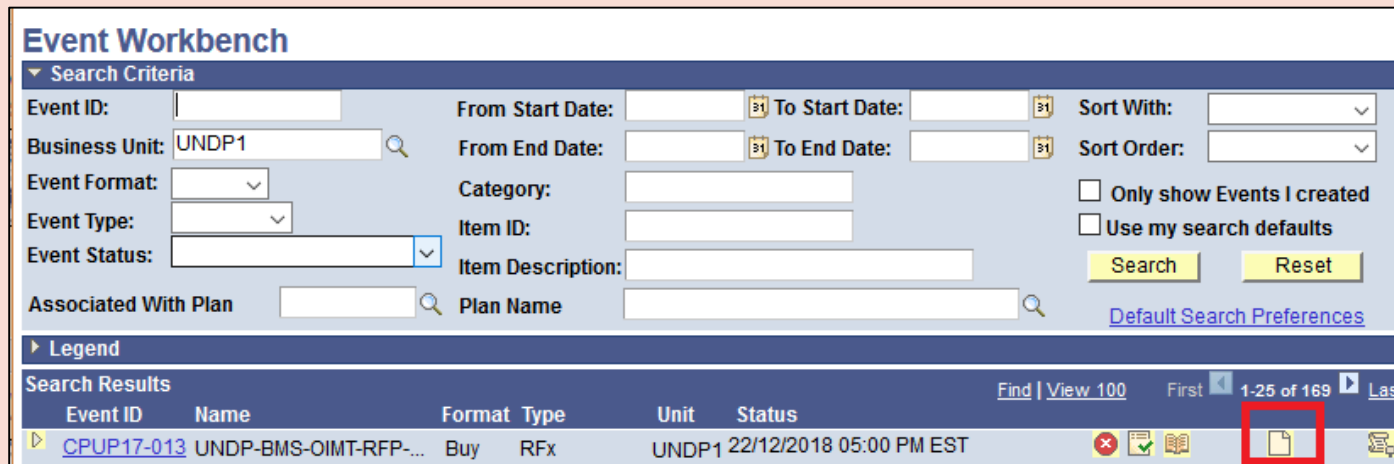
Please note It is important to filter to the correct event to avoid accidentally making changes to other events.



Click to return to Manage
Events main section

5.3 Make Amendments to an Ongoing Event

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



Event Workbench

▼ Search Criteria

Event ID: From Start Date: To Start Date: Sort With:

Business Unit: UNDP1 From End Date: To End Date: Sort Order:

Event Format: Category: ☐ Only show Events I created


Event Type: Item ID: ☐ Use my search defaults

Event Status: Item Description:

Associated With Plan Plan Name [Default Search Preferences](#)

► Legend

Search Results

Event ID	Name	Format	Type	Unit	Status	
CPUP17-013	UNDP-BMS-OIMT-RFP-...	Buy	RFx	UNDP1	22/12/2018 05:00 PM EST	



Important

The following considerations should be noted when making amendments:

- It is not possible to create or approve a new version if the deadline of the previous version has passed. In this scenario, you must create a new event.
- It is not possible to make additional changes to a version that is pending approval. If you want to make more changes, the manager must deny approval so buyer can make more changes to the same version and post again for approval.
- Changes to bid factors or line items should be avoided to the greatest extent possible.** If needed, follow the special instructions in the section on editing events, by clicking [HERE](#)



Click to return to Manage
Events main section

5.3 Make Amendments to an Ongoing Event

- 1. A new version will be created and the event status will change to **“Open”**. Bidders will still continue to see and bid on the earlier version, until this new version is posted and approved.
- 2. System allows buyer to change all event settings and information in the new version.
- 3. All bidders who had accepted an invitation, or posted a bid against the earlier version, will be automatically included as invited bidders in the new version, and will receive a system notification when the new version is approved.
- 4. System will automatically attach any bid that was posted in the earlier version to the new version when it is approved.
Bidders do not have to re-post their bid.



There is only one exception to the above rule – when a buyer makes changes to line items and/or bid factors, any bid posted for the earlier version will be cancelled. Bidders will need to re-submit their bid. Carefully review the instructions on actions to be taken in this scenario by clicking [HERE](#).



Click to return to Manage
Events main section

This event is in posted status. The buyer must click on **create a new version** icon to begin creating a new version.

Search Results						Find View All		First	1 of 1	Last
Event ID	Name	Format	Type	Unit	Status					
0000001987	test for guide	Buy	RFx	UNDP	23/04/2018 07:43 AM EDT					

Search Results						Find View All		First	1 of 1	Last
Event ID	Name	Format	Type	Unit	Status					
0000001987	test for guide	Buy	RFx	UNDP	Open					

Once a buyer clicks on the create a new version icon, the status will change to **“Open”** and the create a new version icon will disappear from the workbench until the new event version is posted and approved by the event approver.

5.3 Make Amendments to an Ongoing Event

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

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

All bidders who fall under any of the categories to receive automatic notifications will be visible in the [Bidder Invitations](#) section of the new event version.



To post any changes to a new version for approval, save the amendments and click on **“Post”** as instructed [here](#).

Modify an Event

Event Summary

Business Unit: UNDP1 Event ID: 0000001975 Round: 1 **Version: 2** Event Format: Buy

Event Type: RFx
Event Status: Open

*Event Name: ITB - UNDP eTendering Guide for Buyers - 2018

Descr: The following amendments have been made to this event:
- Deadline extended
- Updated eTendering User Guide (2018) for Bidders | attached

Preview Date: 15/02/2018 8:38AM EST
*Start Date: 15/02/2018 8:38AM EST
*End Date: 15/04/2018 9:38AM EDT

Copy From: Go

Event Method: ITB

This is where you can view the event version you are working on.

Click to return to Manage
Events main section

5.4 Editing line items and bid factors

Changes to line items and/or bid factors must be avoided unless they are absolutely necessary. Such changes normally change the structure of the tender requirements and the event in the system and therefore any bid that was posted against the earlier version is not considered valid. The system will cancel all such bids and a bid cancellation email will be sent to the respective bidders. Bidders' user guide explains in detail the steps that bidder need to follow to re-submit their bid. However, procurement office need to apply due diligence and follow best practices, to ensure that bidders re-post their bid. Below are some of minimum actions that procurement office need to follow any time changes are made to line items or bid factors:

1. Always make such changes well in advance and with sufficient time for bidders to re-submit their bid. It is recommended that such changes are not made less than seven days from the deadline.
2. Before creating new version, check "[View Bid History](#)" for bidders who have a posted bid. It is advisable to check also through the query ([view bid history and query](#))
3. In the description box of the event, enter a paragraph that describe the changes made and emphasize that bidders must re-submit their bid.
4. Once changes are made and new version is approved, monitor the bidder participation to make sure that bidders who had a bid posted in the earlier version, have re-posted their bid. Follow up with them as needed via email or telephone.



Any of the following changes will trigger cancellation of posted bids:

- Modifying line item quantities;
- Modifying line item description;
- Adding or removing line items;
- Adding or removing bid factors under line item level;
- Adding or removing bid factors at event header level



Important: If manager denies approval of these changes, it is recommended that buyer cancels the version with these changes to avoid that such changes are mistakenly applied in a later version.



5.5 Updating Event Attachments

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



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

Modify an Event

Event Header Comments and Attachments

Event ID: 0000001975

Enter Comments

First 1 of 1 Last

Comments:

☐ 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 user_guide_for_buyers.docx	solicitation document	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2 Steps_to_eTendering_registration_and_submitting_a_bid.pdf	new document	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

OK

Cancel

Refresh

All attachments with the “*Include in Notifications*” box checked will be included in automatic notifications to bidders when the amended event is posted. It is recommended to untick “*Include in Notifications*” for all attachments that were attached in the old version and only tick the box for any new attachments, as it will help the bidder identify which documents are new.



The new version will automatically include all attachments from a previous version. If an attachment is no longer valid, for example, the ITB document has been amended, simply remove it using the **minus sign icon**, and upload the new revised ITB document. It is not necessary to keep the old ITB document for the new version because it will remain available with the previous version of the event.

5.6 View Approval Status of Event

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

The screenshot shows the 'Event Workbench' search results page. At the top, there's a navigation bar with 'Favorites', 'Main Menu', 'eTendering', 'Maintain Events', and 'Event Workbench'. Below this is the 'Event Workbench' header with a 'Search Criteria' section. The search criteria include fields for Event ID, Business Unit (set to UNDP1), Event Format, Event Type, Event Status, From Start Date, To Start Date, Sort With, From End Date, To End Date, Sort Order, Category, Item ID, Item Description, Associated With Plan, and Plan Name. There are 'Search' and 'Reset' buttons. Below the search criteria is a 'Legend' section. The main part of the page is a table of search results. The table has columns: Event ID, Name, Format, Type, Unit, and Status. The first row is highlighted with a red box around the 'Status' column, which shows 'Pending Post Approval'. The table also includes a 'Find' button, a 'View 100' button, and a 'First' button. The table shows 1-25 of 160 results.

Event ID	Name	Format	Type	Unit	Status
CPUP17-013	UNDP-BMS-OIMT-RFP-...	Buy	RFx	UNDP1	22/12/2018 05:00 PM EST
0000001888	UNDP-BMS-OIMT-RFP-...	Buy	RFx	UNDP1	Open
0000001960	Edit Bid Factor Te...	Buy	RFx	UNDP1	Pending Post Approval
0000001957	eTendering Vide0 f...	Buy	RFx	UNDP1	Pending Post Approval
0000001930	Development of IT ...	Buy	RFx	UNDP1	Open
0000001968	approval error tes...	Buy	RFx	UNDP1	Pending Post Approval

Click on the hyperlink under the **"Pending"** section to view complete list of approvers.

The screenshot shows the 'Approval Status' page for event 0000001957. The page has a header with 'Business Unit: UNDP1', 'Event ID: 0000001957', 'Round: 1', 'Version: 1', and 'Event Format: Buy'. Below this is a section for 'Event Type: RFx', 'Start Date: 22/01/2018 10:02AM EST', 'End Date: 12/02/2018 10:02AM EST', 'Event Name: eTendering Vide0 for Bidders', and 'Entered By: roland.koxhaj'. The main section is 'Review/Edit Approvers' with a sub-section 'Event Approval'. Under 'Event Approval', there's a section for 'Approval Status: Pending' with a 'View/Hide Comments' hyperlink. Below this is a 'Skipped' section with 'Roland Koxhaj' as the 'UN Event Approver' for '22/01/18 - 10:03 AM'. There's also a 'Pending' section with 'Multiple Approvers' as the 'UN Event Approver'. At the bottom, there's a 'Comments' section with a comment from 'System at 22/01/18 - 10:03 AM' stating: 'Requester (roland.koxhaj) is approver on step number 1, path 1, stage 10, which has self-approval disabled! (236,1031)'.

To check for any comments entered by the approver, click on the **"View/Hide Comments"** hyperlink with the bubble icon next to it.



Click to return to Manage
Events main section

5.7 View Bidder Participation History

The **View bid history** feature on eTendering allows buyers to see how many bidders are interested participating in an event and how many have already submitted a bid. This can be useful for helping buyers to determine whether the deadline for submission of bids needs to be extended, in case of low participation.

Event Workbench

Search Criteria

Event ID:197

Business Unit:UNDP1

Event Format:

Event Type:

Event Status:

Associated With Plan

From Start Date:

To Start Date:

Sort With:

From End Date:

To End Date:

Sort Order:

Category:

Item ID:

Item Description:

Plan Name

Only show Events I created

Use my search defaults

Search

Reset

Default Search Preferences

Legend

Search Results

Event ID

Name

Format

Type

Unit

Status

Find

View All

First

1-9 of 9

Last

0000001973

UNDP eTendering Us...

Buy

RFx

UNDP1

Pending Award

0000001970

test event

Buy

RFx

UNDP1

Event Completed

0000001972

Open ITB - Simple ...

Buy

RFx

UNDP1

Open

0000001974

Test

Buy

RFx

UNDP1

Open

It is possible for the UNDP Buyer to see which bidders have submitted a bid, but it is not possible to see the actual content of the bid until after the deadline of the event.

To monitor bidder participation for an event, click on the icon named **View Bid History**.

Click to return to Manage
Events main section

UNDP eTendering User Guide for Buyers (April 2018)

79

5.7 View Bidder Participation History

It is possible to view the level of bidder participation through the following selections:

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

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

Event Bid History

Event ID	Event Name	Round	Version	Event Type	End Date
UNDP1-0000001975	ITB - UNDP eTendering Guide for Buyers - 2018	1	6	RFx	19/03/18 11:54AM EDT

Report Type

☒ Event Invitation
 ☐ Best Bids
 ☐ Bidder/Bid
 ☐ List By Line

Event Participation Activity

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

Accepted Invitations

Bidder Name	Invited?	Bid Posted?
AlBarajoub Engineering	No	No
Test Company UNDP	No	Yes
advisa Unternehmensberatung GmbH	No	Yes
eTendering Company for UN	No	No

[Return to Event Workbench](#)



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



Click to return to Manage
Events main section

5.8 View Event History

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

Event Workbench

Search Criteria

Event ID:

Business Unit: UNDP1

Event Format:

Event Type:

Event Status:

Associated With Plan

From Start Date:

To Start Date:

From End Date:

To End Date:

Category:

Item ID:

Item Description:

Plan Name

Sort With: End Date

Sort Order: Descending

☐ Only show Events I created

☐ Use my search defaults

Search

Reset

Default Search Preferences

Legend

Search Results

Event ID	Name	Format	Type	Unit	Status	
CPUP17-013	UNDP-BMS-OIMT-RFP-...	Buy	RFx	UNDP1	22/12/2018 05:00 PM EST	
0000001888	UNDP-BMS-OIMT-RFP-...	Buy	RFx	UNDP1	Open	
0000001973	UNDP eTendering Us...	Buy	RFx	UNDP1	14/04/2018 09:47 AM EDT	



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

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

Atlas Finance

Welcome Dalal Abdulrazzaq, Your Atlas Finance Last Log

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	0000001973	UNDP eTendering User Guide for Buyers (2018)	Buy	RFx	Posted

Version History

Round	Version	Event Status	Modified By	
1	3	Posted	Dalal Abdulrazzaq	
1	2	Inactive Version	Roland Koxhaj	
1	1	Inactive Version	Dalal Abdulrazzaq	

Event Stage

Create Event

Event Approval

Dispatch Event

Receive Bids

Analyze Bids

Award Event

5.8 View Event History & Different Statuses

An event and the different versions created go through different status during the process. Below are some of the most common event status:

1. When the event is first created, the status is shown as **“Open”**. That means that the event is a draft document and system allows changes to be made. The same applies when a new version is created (e.g. version 2). Version 2 event is in **“Open”** status, even though version 1 is **“Posted”**.
2. When the event is sent for approval, status changes to **“Pending award”**. No more changes can be made by event creator at this stage. **If you need to change something before it is approved, the approver must deny instead of approving the event. If approver denies, event status is changed back to “Open” and you can make changes, and post again for approval.**
3. Once approver approves the event, the status changes to **“Posted”**. This means the event is now visible to bidders.
4. When a new version is created (e.g. version 2), it goes through same statuses as above while version 1 remains in **“Posted”** status. Once version 2 is approved, its status changes to **“Posted”** and status of version 1 becomes **“Inactive”**.
1. After the bidding deadline has passed, the status of event is changed to **“Event Completed”**. It will remain as such until further action taken by buyer as below.

Event History					
Event Information					
Bus. Unit	Event ID	Event Name	Event Format	Event Type	Status
UNDP1	0000001987	test for guide	Buy	RFx	Open
Version History					
Round	Version	Event Status	Modified By		
1	4	Open	Dalal Abdulrazzaq		
1	3	Cancelled	Dalal Abdulrazzaq		
1	2	Cancelled	Dalal Abdulrazzaq		
1	1	Posted	Dalal Abdulrazzaq		


Event History					
Event Information					
Bus. Unit	Event ID	Event Name	Event Format	Event Type	Status
UNDP1	0000001955	create vendor	Buy	RFx	Pending Award
Version History					
Round	Version	Event Status	Modified By		
1	1	Pending Award	Dalal Abdulrazzaq		


Event History



Event Information

Bus. Unit	Event ID	Event Name	Event Format	Event Type	Status
UNDP1	0000001977	eTendering User Guide - UNDP Users	Buy	RFx	Posted

Version History

Find | View All | 

First 1-2 of 2  Last

Round	Version	Event Status	Modified By	
1	2	Posted	Dalal Abdulrazzaq	
1	1	Inactive Version	Dalal Abdulrazzaq	

Event Stage

Search Results					
Event ID	Name	Format	Type	Unit	Status
0000001977	eTendering User Gu...	Buy	RFx	UNDP1	Event Completed

 Click to return to Manage Events main section

5.8 View Event History & Different Statuses

- 6. When buyer reviews and download bids, s/he must **“Save”** changes. When it is **“Saved”**, event status changes to **“Pending award”** and remains like that until it is awarded or closed.
- 7. When an event is being evaluated using evaluation feature – collaborators have been invited – status is changed to **“Pending Collaboration Analysis”**. It remains as such until collaborators **“Complete Analysis”** or collaboration deadline has passed. After that event goes back to **“Pending Award”** status.
- 8. When the Purchase order is created for all line items and quantities in the event, the event status changes to **“Awarded”**. If not all quantities are awarded to a PO, status will remain as **“Pending Award”**.
- 8. In case when some of the line items or quantities will not be awarded to a PO, buyer can close the event lines manually in order to change the status of the event to **“Awarded”**. The same steps can be followed if, for any reason, the PO is created outside eTendering system. Click here for further instructions.
- 9. If there is no award to be made, buyer can close the event following same instructions as per above. Since none of the lines or any quantity has been awarded to a PO, the event status will change to **“No Award”**.
- 10. If an event is cancelled, status will change to **“Cancelled”**.



Important: Buyers must ensure that the event status is updated showing the current status of the tender. In particular, if PO is not created from eTendering, buyers must close the event manually to show status as **“Awarded”** or **“No award”** accordingly. The status of the event is visible to bidder who participated.”

Event History					
Event Information					
Bus. Unit	Event ID	Event Name	Event Format	Event Type	Status
UNDP1	0000001977	eTendering User Guide - UNDP Users	Buy	RFx	Collaborating Bid Analysis
Version History					
Round	Version	Event Status	Modified By		
1	2	Collaborating Bid Analysis	Dalal Abdulrazzaq		
1	1	Inactive Version	Dalal Abdulrazzaq		

Event History					
Event Information					
Bus. Unit	Event ID	Event Name	Event Format	Event Type	Status
UNDP1	0000001973	UNDP eTendering User Guide for Buyers (2018)	Buy	RFx	Pending Award
Version History					
Round	Version	Event Status	Modified By		
1	6	Pending Award	Dalal Abdulrazzaq		
1	5	Inactive Version	Dalal Abdulrazzaq		

Event History					
Event Information					
Bus. Unit	Event ID	Event Name	Event Format	Event Type	Status
UNDP1	0000001975	ITB - UNDP eTendering Guide for Buyers - 2018	Buy	RFx	Awarded
Version History					
Round	Version	Event Status	Modified By		
1	6	Awarded	Dalal Abdulrazzaq		

Event History					
Event Information					
Bus. Unit	Event ID	Event Name	Event Format	Event Type	Status
UNDP1	0000001978	eTendering User Guide 2018 - For UNDP Users	Buy	RFx	Not Awarded
Version History					
Round	Version	Event Status	Modified By		
1	3	Not Awarded	Dalal Abdulrazzaq		

Version History					
Round	Version	Event Status	Modified By		
1	1	Cancelled	Dalal Abdulrazzaq		

5.9 Cancel an Event




To cancel an event, click on the **“Cancel Event”** icon.

Legend

Search Results

Find | View All

First 1 1-9 of 9 Last

Event ID	Name	Format	Type	Unit	Status	
0000001973	UNDP eTendering Us...	Buy	RFx	UNDP1	Pending Award	
0000001970	test event	Buy	RFx	UNDP1	Event Completed	
0000001972	Open ITB - Simple ...	Buy	RFx	UNDP1	Open	

Cancel Event for: Dalal Abdulrazzaq

Event Information

Business Unit	Event ID	Event Name	Round	Version	Format	Status	Bids Received
UNDP1	0000001987	test for guide	1	2	Buy	Open	No


Line Information

Line	Category	Item ID	Item Description
1	369000	0000000000000000010	Tape Dispenser Big

Cancel Event

[Return to Event Workbench](#)

In this example, the status is **Open** in **Version 2**. Clicking on **Cancel Event** will cancel version 2 (the latest version) only. Version 1 will still remain posted.




Important:

Check the status of your event before cancelling.

When an event is in **“Open”** or **“Pending approval”** status, clicking on **“Cancel Event”** will only cancel the latest version of the event, not the entire event.

Cancelling an event that is in **“Pending Award”** or **“Posted”** status will cancel the whole event and this action cannot be reverted.



When an event that was posted or is completed is cancelled, bidders who had either: previously posted a bid to the event, accepted an invitation or bidders who were invited to the event via eTendering, will all receive an automatic event cancellation notification such as the one shown below.

Cancel Event for: Dalal Abdulrazzaq

Event Information

Business Unit	Event ID	Event Name	Round	Version	Format	Status	Bids Received
UNDP1	0000001973	UNDP eTendering User Guide for Buyers (2018)	1	2	Buy	Pending Post Approval	No

Line Information

Line	Category	Item ID	Item Description
1	381000		INSERT ITEM DESCRIPTION AND CORRECT CATEGORY

Cancel Event

[Return to Event Workbench](#)

Message

Are you sure you want to cancel this event? (0,0)

Yes

No



Click to return to Manage Events main section

6.0 Opening & Evaluation of Bids



[Click to return to TOC](#)

This section covers instructions on how to access the bids received, conduct Public Bid Opening when it is required, how to download and share the bid documents, and how to use the Evaluation Process Management function.

[6.1 Public Bid Opening report \(only for ITBs\)](#)

[6.2 Public Bid Opening for LOTs](#)

6.3 Opening & Downloading Bids

- [Zip Folder Download](#)
- [Downloading Files individually](#)
- [Export Event Analysis File](#)

[6.4 Using the Evaluation Process Management feature](#)

- [Step 1: Invite Collaborators](#)
- [Step 2: Share Event Analysis](#)
- [Step 3: Evaluation Reports](#)
- [Step 4: Document Evaluation in the System](#)
- [General Remarks on eTendering feature controls and Audit trail](#)

6.1 Public Bid Opening Report (for ITBs only)

Once the event deadline has closed, it is possible to generate a public bid report through eTendering that will automatically be sent to all bidders who have submitted a bid to that event via the system.

To generate the Public Bid Opening report, go to **Main Menu → eTendering → Maintain Events → Event Workbench**. Find the concerned event, and click on the **Analyze Bids** icon

Event Workbench

Search Criteria

Event ID: 197

Business Unit: UNDP1

Event Format:

Event Type:

Event Status:

Associated With Plan

From Start Date:

From End Date:

Category:

Item ID:

Item Description:

Plan Name

To Start Date:

To End Date:

Sort With:

Sort Order:

☐ Only show Events I created

☐ Use my search defaults

Search

Reset

Default Search Preferences

Legend

Event ID	Name	Format	Type	Unit	Status
0000001973	UNDP eTendering Us...	Buy	RFx	UNDP1	Pending Award

From the “**Analyze Events**” page, click on the top right hand link, “**Public Bid Opening Notification**”.

Analyze Events

Analyze Total

Analyze Line

Review Constraints

Award Summary

Award Details

Public Bid Opening Notification

Business Unit: UNDP1

Event ID: 0000001975

Round: 1

Version: 6

Event Name: ITB - UNDP eTendering Guide for Buyers - 2018

Click on “**Yes**”.

ATTENTION: Use this function only for Tenders that require a Public Bid Opening Event, such as ITBs

Message

Are you sure you want to send public bid opening report to all participating bidders? (20001,121)

Please be aware that normally this report should only be sent out for ITB processes as per procurement policies.

Êtes-vous sûr de vouloir envoyer le rapport public d'ouverture des plis à tous les soumissionnaires participants? Veuillez noter que normalement ce rapport ne devrait être envoyé que pour les processus ITB selon les politiques en matière d'achats.

¿Estás seguro de que quieres enviar el informe sobre la apertura pública de ofertas a todos los licitadores participantes? Por favor, tenga en cuenta que, generalmente y según las políticas de adquisiciones, este informe sólo se debe enviar para procesos de licitación.

Вы уверены, что хотите разослать отчет об открытии конкурсных предложений всем участникам конкурса? Пожалуйста, обратите внимание на то, что согласно действующей политике ПРООН в сфере закупок, данный отчет рассылается только в рамках процесса ПУТ ("ITB").

你確定你想將公開投標報告發給所有參與的投標者嗎？
需要留意的是，根據採購的規則，一般情況下這份報告只應該用於ITB程序

Yes

No

Click to return to Evaluation of Bids main section

6.1 Public Bid Opening Report (For ITBs only)

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

Please see an example of the Public Bid Opening notification below:

Public Bid Opening Notice

Dear Bidders,

Please find the Public Bid Opening report for the referred event in which you have participated.

Please note that this is simply information on bids received through the system and does not indicate any ranking, scoring, or winner for this event. All the bids received will be evaluated in line with the advertised criteria and upon completion of the evaluation process, successful and unsuccessful bidders will be notified accordingly.

Chers soumissionnaires,

voici le rapport d'ouverture d'appel d'offres public pour l'événement indiqué auquel vous avez participé.

Veillez noter qu'il contient simplement des informations au sujet des offres reçues via le système, et en aucun cas un classement, un score ou un gagnant pour cet événement. Toutes les offres reçues seront évaluées en fonction des critères rendus publics et à l'issue du processus d'évaluation, les soumissionnaires retenus et non retenus seront informés du résultat.

Estimados Licitadores:

Aquí le enviamos el informe de Apertura de licitaciones públicas para el evento indicado en el cual ha participado.

Tenga en cuenta que se trata simplemente de información sobre licitaciones recibidas a través del sistema y no indica ninguna clasificación, puntuación o ganador para este evento. Todas las licitaciones recibidas serán evaluadas con los criterios anunciados y, una vez completado el proceso de evaluación, los licitadores elegidos o no elegidos serán notificados pertinentemente.

Уважаемые участники торгов!

Предлагаем вашему вниманию отчет о публичном вскрытии конвертов с тендерными заявками в рамках конкурса, в котором вы принимали участие.

Обращаем внимание, что данный отчет представляет собой информации по заявкам, полученным через систему, и не отображает распределение по категориям, оценки или имя победителя данного конкурса. Все полученные заявки будут оценены в соответствии с объявленными критериями, и после завершения процесса оценки участники торгов, которые победили или не победили в конкурсе, будут уведомлены соответственно.

亲爱的投标人，

请查收您有参加的被描述的活动的公开开标报告。

请注意，这只是通过系统收到的出价信息和不表示任何本活动的排名，得分或赢家，所有收到的出价将以广告中宣传的标准评估，完成评价过程后，将通知相应的成功和失败的投标人

أعزائي مقامي العطاءات، الرجاء استلام تقرير الفتح العلني لمظاريف العطاءات الخاص بالفعالية المشار إليها والتي تشارك فيها. الرجاء مراءاة أن هذه المعلومات المتعلقة بالعطاءات يتم استلامها عبر النظام ولا تشر إلى أي ترتيب أو نقاط أو إلى الفئات في الفعالية. يستمع كل العطاءات المنظمة للتقييم استناداً إلى المعايير المعن عنها. سيتم الأمانة عن ماقدم العطاءات الناجحة وغير الناجحة وفقاً لمعايير التقييم بعد اكتمال العملية.

Country Name	Company	Price	Bid Currency
Sudan	AlBarajoub Engineering	11	USD
Senegal	COMET AFRIQUE TELECOMS	12	USD
Sudan	Wales Investment and Services Co. Ltd.	11	USD
Germany	advisa Unternehmensberatung GmbH	120	USD



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



6.2 Public Bid Opening for LOT events

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

In such cases, Procurement office will display his computer screen for bidders (through a projector or via video conference depending on how the event is organized) and navigate to eTendering page to show the bids received per each LOT as explained below:

Go to **Main Menu → eTendering → Maintain Events → Event Workbench** and search for the event. Click on the **View Bid History** icon.

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



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

Event Bid History

Event ID	Event Name	Round	Version	Event Type	End Date	Status
UNDP1-0000001978	eTendering User Guide 2018 - For UNDP Users	1	3	RFx	22/03/18 7:58AM EDT	Posted

Report Type

☐ Event Invitation ☐ Best Bids ☒ Bidder/Bid ☐ List By Line

Status/Ranking









☐ Score ☐ Rank ☐ Bid Status ☒ Price

Refresh

Sort By:

☐ Descending

[Expand All](#) [Collapse All](#)

					Find	First	1-4 of 4	Last
Bidder Name	Bid#	Bidder ID	Date Time Posted					
 Test Company UNDP	1	0000031510	22/03/2018 7:28:58AM		190.00 USD			
 Test Registration Fix	1	0000031508	22/03/2018 7:45:14AM		522.00 USD			
 advisa Unternehmensberatung GmbH	1	0000024179	22/03/2018 7:46:57AM		622.00 USD			
 eTendering Company for UN	1	0000031511	22/03/2018 7:41:45AM		2,016.00 USD			



6.2 Public Bid Opening for LOT events

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

Event Bid History

Event ID	Event Name	Round	Version	Event Type	End Date	Status
UNDP1-0000001978	eTendering User Guide 2018 - For UNDP Users	1	3	RFx	22/03/18 7:58AM EDT	Posted

Report Type

☐ Event Invitation ☐ Best Bids ☒ Bidder/Bid ☐ List By Line

Status/Ranking

☐ Score ☐ Rank ☐ Bid Status ☒ Price

Refresh

Sort By: ☐ Descending

Expand All

Collapse All

Bidder Name	Bid#	Bidder ID	Date Time Posted	Find	First	1 of 4	Last
<input checked="" type="checkbox"/> Test Company UNDP	1	0000031510	22/03/2018 7:28:58AM			190.00 USD	<input checked="" type="checkbox"/>
<div>Line</div> <div>Item ID</div>		<div>Item Description</div>			<div>Price</div>		
1	00000000000000000005	computer			130.00 USD		
2	00000000000000000015	Highlighter Stabilo Blue			55.00 USD		
3	321965	Paper stationery sets			5.00 USD		
<input checked="" type="checkbox"/> Test Registration Fix	1	0000031508	22/03/2018 7:45:14AM			522.00 USD	<input checked="" type="checkbox"/>
<div>Line</div> <div>Item ID</div>		<div>Item Description</div>			<div>Price</div>		
1	00000000000000000005	computer			500.00 USD		
2	00000000000000000015	Highlighter Stabilo Blue			12.00 USD		
3	321965	Paper stationery sets			10.00 USD		
<input checked="" type="checkbox"/> advisa Unternehmensberatung GmbH	1	0000024179	22/03/2018 7:46:57AM			622.00 USD	<input checked="" type="checkbox"/>
<div>Line</div> <div>Item ID</div>		<div>Item Description</div>			<div>Price</div>		
1	00000000000000000005	computer			600.00 USD		
2	00000000000000000015	Highlighter Stabilo Blue			12.00 USD		
3	321965	Paper stationery sets			10.00 USD		
<input checked="" type="checkbox"/> eTendering Company for UN	1	0000031511	22/03/2018 7:41:45AM			2,016.00 USD	<input checked="" type="checkbox"/>



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



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




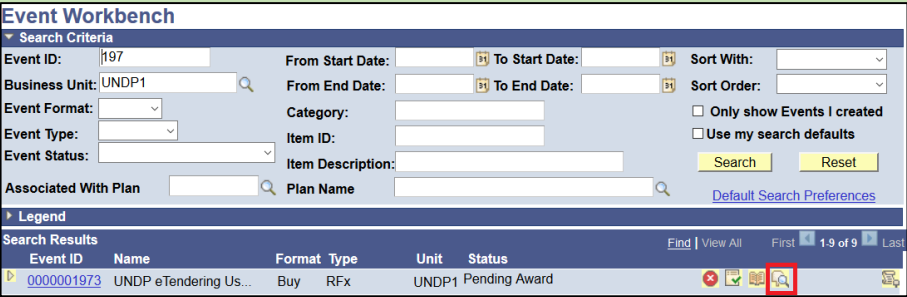
For internal purposes, to have a printed record of the bids received (e.g. to submit to CAP/ACP), **make a PDF print of this page (CTRL + P)**



Click to return to Evaluation
of Bids main section

6.3 Opening & Downloading Bids: ZIP Folder Download

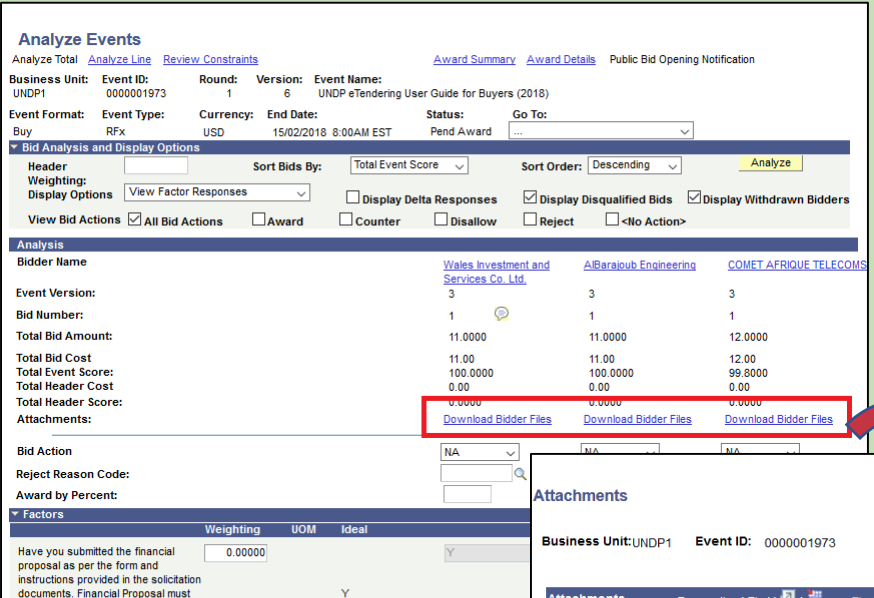
To open and download bid submissions once an event is completed, go to **Main Menu → eTendering → Maintain Events → Event Workbench**. Find the concerned event, and click on the **Analyze Bids** icon 



The Event Workbench interface shows search criteria for Event ID 197, Business Unit UNDP1, and Event Format Buy. It includes filters for dates, categories, and item descriptions. A search button and a reset button are visible. Below the search criteria, there is a legend and a search results table. The search results table has columns for Event ID, Name, Format, Type, Unit, and Status. The first result is Event ID 000001973, Name UNDP eTendering Us..., Format Buy, Type RFX, Unit UNDP1, and Status Pending Award. A red box highlights the 'Analyze Bids' icon in the top right corner of the search results table.

From the **Analyze Events** page, there are two ways how to download bidder files:

1. Use the Zip Download feature to download all files uploaded by bidder in a single Zip file.
2. If the first method does not work, it is possible to download each file one by one. See following slides for instructions how to do it.



The Analyze Events page shows a table with columns for Bidder Name, Event Version, Bid Number, Total Bid Amount, Total Bid Cost, Total Event Score, Total Header Cost, and Total Header Score. The table lists three bidders: Wales Investment and Services Co. Ltd., AlBaraouh Engineering, and COMET AFRIQUE TELECOM. A red box highlights the 'Download Bidder Files' link under each bidder's name. A red arrow points from this box to the Attachments section on the right.

To download each bidder's complete set of bidder files in a ZIP folder, click on the link titled, **Download Bidder Files** under each Bidder's name.



The ZIP download may not work if bidders have uploaded a large number of individual files. Bidders should be instructed in the solicitation documents on file upload restrictions and specifications. For more information click [here](#)



It is up to each office and each evaluation team how to share the bid files. One option is for the procurement officer who is facilitating the process to download and then share the files with each member. Alternatively, each member accesses the files directly from the system. In any case, the evaluation are responsible for ensuring that all files submitted by bidders are considered in the evaluation process.



The Attachments section shows a table with columns for Attached File and Attachment Description. The table lists several files: Details_for_Bidder_Registration_-_UNDP_eTendering.docx, Overview_and_benefit_of_eTendering_20150518.pdf, Bidders_presentation.pptx, Resources_for_UNDP_Users.docx, Managing_saved_and_posted_bids.pdf, and View_Bid_History.docx. A red box highlights the 'Download Zip Attachments' button at the bottom of the table.

 Click to return to Evaluation of Bids main section

6.3 Opening & Downloading Bids: ZIP Folder Download

To ensure that all bidder files have been downloaded and are considered in the evaluation, evaluation team has to crosscheck the files downloaded against the bid files list in the PDF bid files that system generates for each bid.

Attachments

Business Unit:UNDP1 Event ID: 0000001977

Attachments

Personalize | Find | 1-5 of 5 | First | Last

Attached File	Attachment Description
Bidder_contact_details.docx	
Bidder_documentation.docx	
Financial_proposal.docx	
Bank_references.docx	
eTendering_User_Guide_-_UNDP_Users.pdf	Bid Details

Download Zip Attachments

Bidder Information

Firm Name:

Name:Signature:

Phone #:Fax #:


Street Address:

City & State:Zip Code:

Email:

Bid Attachments :

File Name :Bidder_contact_details.docx, File Description :
File Name :Bidder_documentation.docx, File Description :
File Name :Financial_proposal.docx, File Description :
File Name :Bank_references.docx, File Description :



The PDF file generated by the system for each Bidder is the one named “**Bid Details**” in the Attachment description. When you have downloaded the ZIP folder, open the system generated PDF and cross-check the list of Bid attachments under the “**Bidder Information**” section.

6.3 Opening & Downloading Bids: Download Files Individually

In addition to [downloading Bidder Files in a ZIP folder](#), it is possible to download the Bidder files individually.

There are 3 different locations on the **Analyze Events** page that must be checked if bidder files are being downloaded individually:

1. [Header Comments level](#)
2. [Bid Factor Level](#)
3. [Line Item Level](#)

If downloading the files in a ZIP folder is not possible, it is important to follow the steps outlined in the following slides to check for files that may have been uploaded in all 3 locations specified above.

The screenshot shows the 'Analyze Events' page in the Atlas Finance system. The page header includes the user's name 'Dalal Abdulrazzaq' and the login time '22.Mar.2018 12:54:16 GMT'. The main navigation bar shows the path: Main Menu > eTendering > Maintain Events > Event Workbench > Analyze Events. The page title is 'Analyze Events'. Below the title, there are links for 'Analyze Line', 'Review Constraints', 'Award Summary', 'Award Details', and 'Public Bid Opening Notification'. The main content area is divided into several sections. The first section, 'Business Unit: UNDP1', 'Event ID: 0000001978', 'Round: 1', 'Version: 3', 'Event Name: eTendering User Guide 2018 - For UNDP Users', 'Event Format: Buy', 'Event Type: RFx', 'Currency: USD', 'End Date: 22/03/2018 7:58AM EDT', 'Status: Pend Award', and 'Go To: ...', is highlighted with a red box and a yellow circle labeled '3'. The second section, 'Bid Analysis and Display Options', includes 'Header Weighting: ...', 'Sort Bids By: Total Event Score', 'Sort Order: Descending', and 'Display Options: View Factor Responses'. It also has checkboxes for 'Display Delta Responses', 'Display Disqualified Bids', 'Display Withdrawn Bidders', 'All Bid Actions', 'Award', 'Counter', 'Disallow', 'Reject', and '<No Action>'. The third section, 'Analysis', contains a table with columns for 'Bidder Name', 'Event Version', 'Bid Number', 'Total Bid Amount', 'Total Bid Cost', 'Total Event Score', 'Total Header Cost', 'Total Header Score', and 'Attachments'. The table has three rows of data, each corresponding to a bidder: 'Test Company UNDP', 'Test Registration Fix', and 'advisa Unternehmensberatung GmbH'. The 'Attachments' column for each bidder has a 'Download Bidder Files' link. This table is highlighted with a red box and a yellow circle labeled '1'. The fourth section, 'Award by Percent: Factors', is highlighted with a red box and a yellow circle labeled '2'. It includes a table with columns for 'Factors', 'Weighting', 'UOM', and 'Ideal'. The table has one row of data: 'Have you submitted the financial proposal as per the form and' with a weighting of '0.00000' and 'Y' in the 'UOM' and 'Ideal' columns.

Bidder Name	Event Version	Bid Number	Total Bid Amount	Total Bid Cost	Total Event Score	Total Header Cost	Total Header Score	Attachments
Test Company UNDP	1	1	190.0000	190.00	66.7000	0.00	0.0000	Download Bidder Files
Test Registration Fix	1	1	522.0000	522.00	56.0000	0.00	0.0000	Download Bidder Files
advisa Unternehmensberatung GmbH	1	1	622.0000	622.00	54.2000	0.00	0.0000	Download Bidder Files

Factors	Weighting	UOM	Ideal
Have you submitted the financial proposal as per the form and	0.00000	Y	Y



6.3 Opening & Downloading Bids: Download Files Individually

1. Bidder files at Header Comment Level

When downloading files individually, go to the Event Workbench, search for the Event, and click on the **Analyze Events** page. First, start by check for files uploaded at the **Header Comments Level**, represented by a bubble icon next to the Bid Number for each Bidder.

Click on the eyeglass icon next to each corresponding file to view and download the files.

Analysis

Bidder Name

advisa Unternehmensberatung GmbH

Event Version:

1

Bid Number:

1

Total Bid Amount:

26.0000

Total Bid Cost

26.00

Total Event Score:

100.0000

Total Header Cost

0.00

Total Header Score:

0.0000

Attachments:

[Download Bidder Files](#)

Bid Action

NA

Reject Reason Code:

Award by Percent:

Response Header Comments/Attachments



Business Unit:UNDP1 Event ID: 0000001979

Comments

Comments:

Attachments

Personalize | Find | 1-2 of 2 | First | Last

Attached File	Attachment Description	
Bidder_contact_details.docx		
User_Guide.pdf	Bid Details	

Return




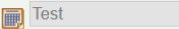
6.3 Opening & Downloading Bids: Download Files Individually

2. Bidder files at Bid Factor level

Secondly, to access and view bidder files at the bid factor level, from the **Analyze Events** page, Scroll down to the section named **“Factors”** and for each Bid factor check for a rectangular icon which indicates an attachment. Click on the this icon to view and download Bidder files for each Bidder.

To view and download the files, click on the eyeglass icon next to each corresponding file.

Factors

	Weighting	UOM	Ideal	
Have you provided Price and Delivery Schedule form: Fully completed and duly authorized?	0.00000		Y	
Provide List of Bank References (Name of Bank, Location, Contact Person and Contact Details).	0.00000			



Response Factor Comments/Attachments


Business Unit: UNDP1 Event ID: 0000001979

Comments

Comment Text:

Attachments

Personalize | Find |  |  First 1 of 1 Last

Attached File	Attachment Description	
Financial_proposal.docx		



6.3 Opening & Downloading Bids: Download Files Individually

3. Bidder files at the Line Item Level

Finally, to access and view bidder files at the Line item level, from the **Analyze Events** page, click on **Analyze Line** link.

For each Line item, click on the bubble icon to view and download Bidder files for each Bidder.

To view and download the files, click on the eyeglass icon next to each corresponding file.

Response Line Comments/Attachments

Business Unit: UNDP1 Event ID: 0000001979 **Line: 2**

Comments

Comments:

Attachments Personalize | Find | First 1 of 1 Last

Attached File	Attachment Description
Bidder_contact_details.docx	

Return



Click to return to Evaluation of Bids main section



It is very important that you check each Line item for Bidder attachments.

To do this, make sure that you navigate through all the Line items by clicking through the numbered arrows on the top right hand corner.

Analyze Events

[Analyze Total](#) [Analyze Line](#) [Review Constraints](#) [Award Summary](#) [Award Details](#) [Public Bid Opening Notification](#)

Business Unit: UNDP1 Event ID: 0000001979 Round: 1 Version: 1 Event Name: User Guide

Event Format: Buy Event Type: RFx Currency: USD End Date: 22/03/2018 11:20AM EDT Status: Pend Award Go To: ...

Select Line: 1 - 0000000000000000017 - Highlighter Stabilo Gree **1 of 2**

Line Number: 1 Requested Quantity: 1.0000 UOM: EA Start Price: 1.00000 Item ID: 0000000000000000017 Item Description: Highlighter Stabilo Green Weighting: 50.00000

Bid Analysis and Display Options

Analyze Qty: 1.0000 Sort Bids By: Sort Order: Descending **Analyze**

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

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

Analysis

Bidder Name: advisa Unternehmensberatung GmbH

Event Version: 1

Bid Number: 1

Analyze Events

[Analyze Total](#) [Analyze Line](#) [Review Constraints](#) [Award Summary](#) [Award Details](#) [Public Bid Opening Notification](#)

Business Unit: UNDP1 Event ID: 0000001979 Round: 1 Version: 1 Event Name: User Guide

Event Format: Buy Event Type: RFx Currency: USD End Date: 22/03/2018 11:20AM EDT Status: Pend Award Go To: ...

Select Line: 2 - 0000000000000000009 - Correction Pen Uni Metal **2 of 2**

Line Number: 2 Requested Quantity: 1.0000 UOM: EA Start Price: 81.95000 Item ID: 0000000000000000009 Item Description: Correction Pen Uni Metal Weighting: 50.00000

Bid Analysis and Display Options

Analyze Qty: 1.0000 Sort Bids By: Sort Order: Descending **Analyze**

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

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

Analysis

Bidder Name: advisa Unternehmensberatung GmbH

Event Version: 1

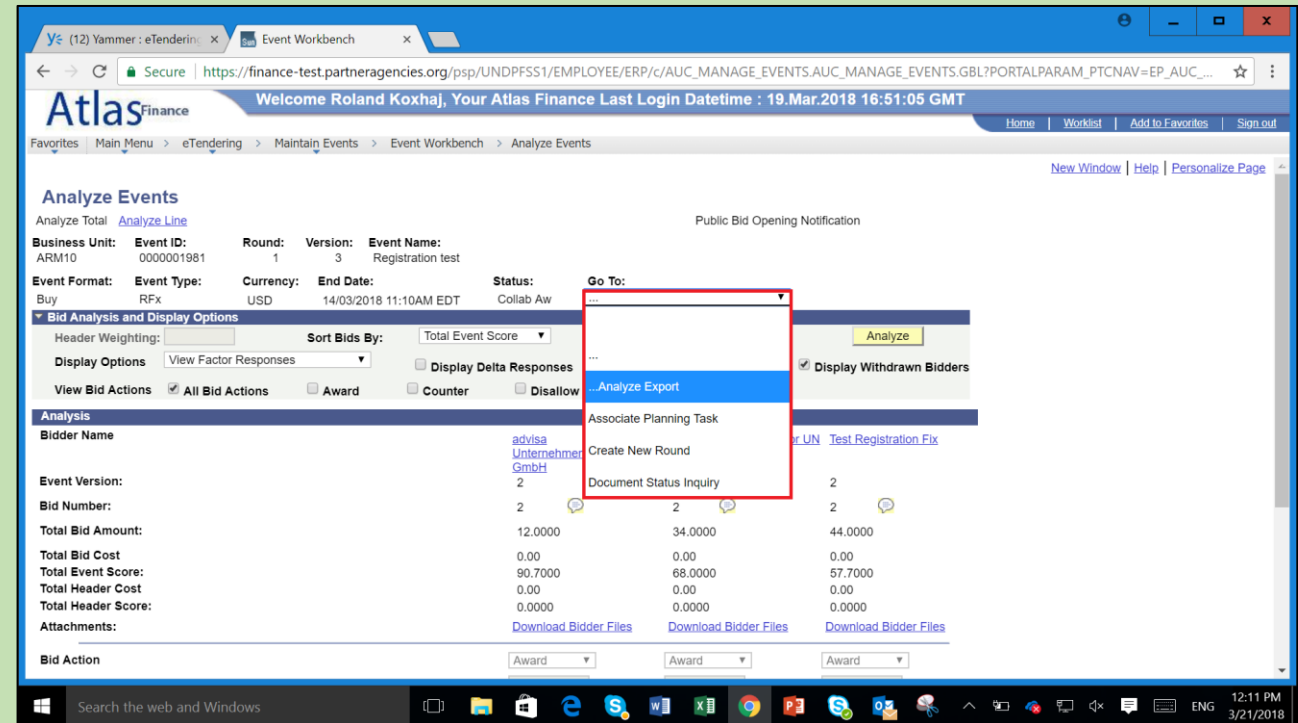
Bid Number: 1

6.3 Opening & Downloading Bids: Export Event Analysis File

Once an event is complete, it is possible to use the system to generate an excel table which tabulates the responses to bid factors and items for line items provided by all bidders.

To generate and download this file, from the Analyze Events page of the event you are working on, open the drop down menu from **“Go To”** box and select **“Analyze export”**.

This feature is also used to facilitate [Step 2 of the eTendering evaluation process](#).



6.4 Evaluation Process Management feature

The eTendering **Evaluation Process Management Feature** is intended to simplify and streamline the evaluation process making it more efficient, but at the same time, enhancing the audit track of this process. It does not replace the standard evaluation process. The evaluation team will still have to evaluate offers received following the UNDP procurement policies and guidelines.

With this new feature however, some of the management and administrative actions of the evaluation process are streamlined and automated.

Below are the main features of the Evaluation Module:

- Invite members of the evaluation committee and give them access to the bids of a specific tender.
- Serve as a file repository for filing all document related to evaluation, including evaluation clarifications, evaluation report, etc.
- Record main conclusion/summary of the evaluation report/outcome.
- Online signature feature to allow evaluation team members to sign/certify evaluation report and other documents online.
- Process tracking and auditing.

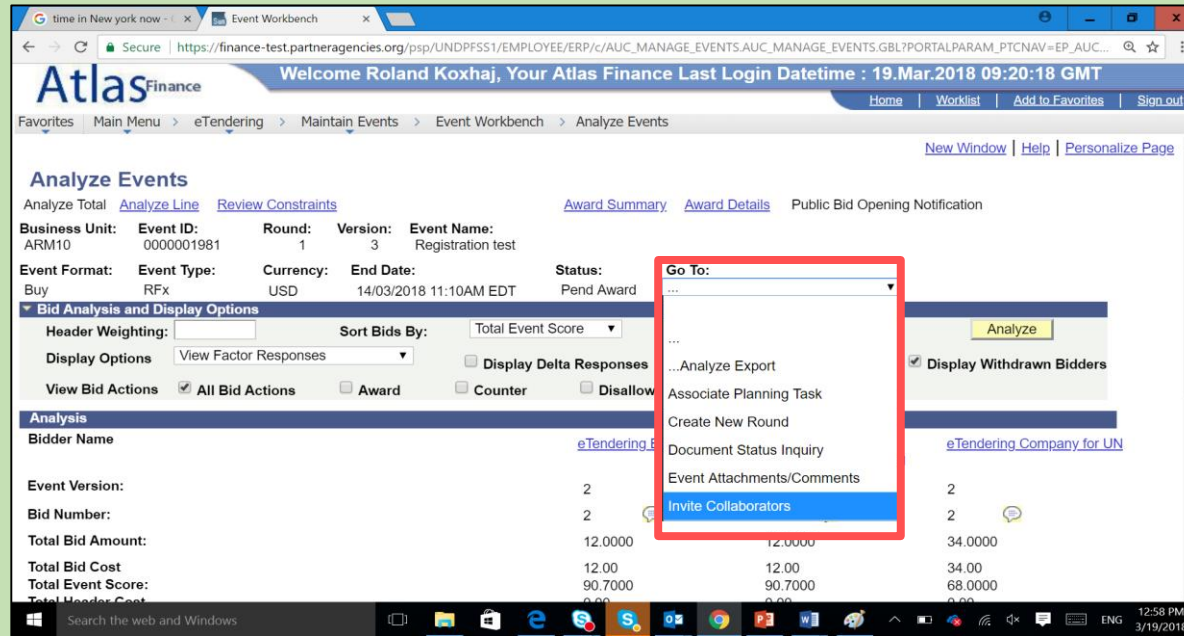


6.4 Evaluation Process Management Feature

Step 1: Invite Collaborators

Once the composition of the evaluation panel has been approved, invite the individuals to grant access to the tender and bids.

To do this, from the **Analyze Events** page for the Event you are working on, open the **Go To:** drop down menu at and select “**Invite Collaborators**”



Non-ATLAS users cannot be invited as collaborators. In such cases, evaluation reports need to be signed externally, and then uploaded in this page. The remaining evaluation team members with access to ATLAS still need to sign online in the system.



Click to return to Evaluation
of Bids main section

6.4 Evaluation Process Management Feature

Step 1: Invite Collaborators

1. Once at the **Event Collaboration Details** page, select the individuals you wish to invite by searching **“Collaborator ID”**.
2. Add a deadline for collaboration.
3. Check the **“Show Bidders name”** box.
4. Click on **“Route to”**
5. Click **“Ok”** to the system message shown on the right.
6. Collaborators invited will have access to the specific tender.

The screenshot displays the 'Event Collaboration Details' page. A modal message box is open on the right, stating: 'The event will be saved and routed to the collaborators making it read-only until the due date. (18058,583)'. Below the message box, the 'Collaboration Due Date' is set to '22/03/2018'. A table titled 'Invited Collaborators' lists three individuals: Roland Koxhaj, Dalal Abdulrazzaq, and Arvis Vilcins, all with a status of 'Pending'. The 'Show Bidders Name' checkbox is checked, and the 'Route To' button is highlighted. At the bottom of the page, there are 'OK', 'Cancel', and 'Refresh' buttons.

Collaborator Opid	Name	Status
roland.koxhaj	Roland Koxhaj	Pending
dalal.abdulrazzaq	Dalal Abdulrazzaq	Pending
arvis.vilcins	Arvis Vilcins	Pending



Please note that the **Collaboration due date** does not have any functional impact on the process, but it will not allow buyer to create a contract until due date has passed. It is recommended due date is selected as a very near future date, to avoid situations where evaluation has been completed but due date has not and buyer cannot create PO.



6.4 Evaluation Process Management Feature

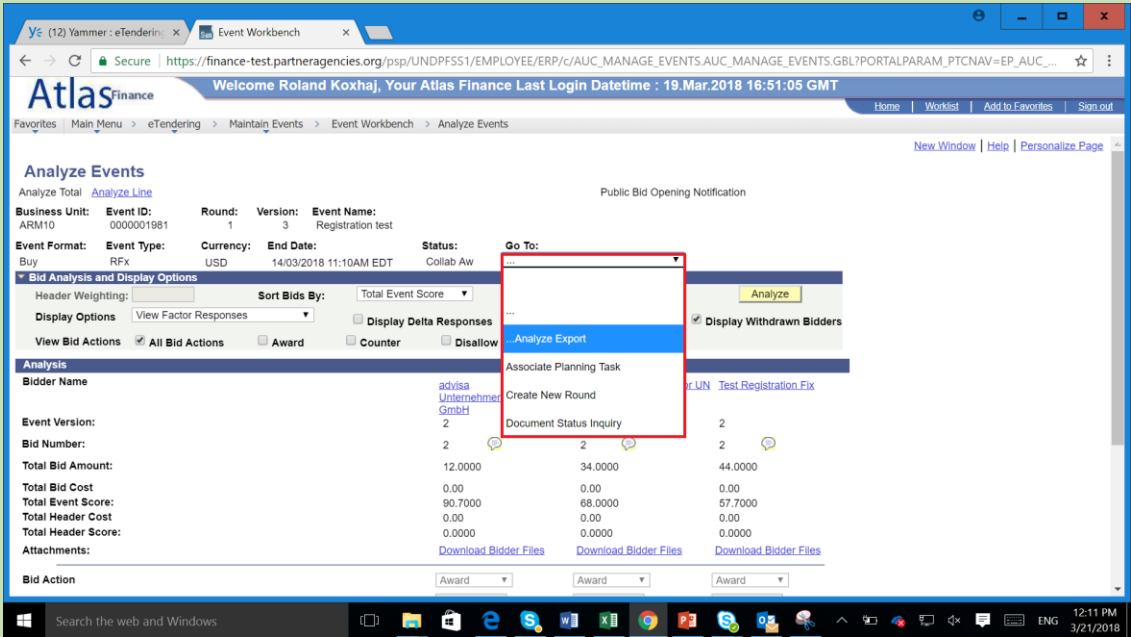
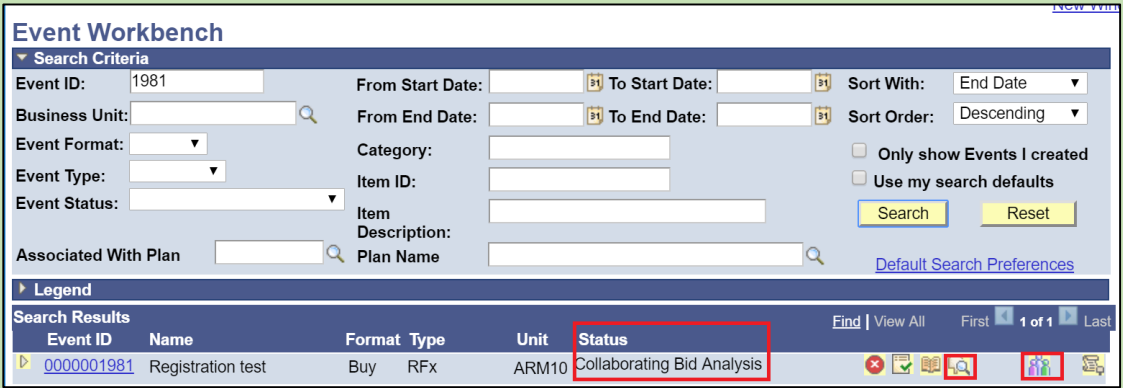
Once Collaborators have been invited to the event you can begin the evaluation process.

To go to the bids analysis and evaluation page, go to the Event Workbench, and click on the **“Analyze Bids”** and **“Bid Collaboration”** icons.

Step 2: Export Event Analysis File to Evaluation Team

To facilitate the evaluation, the system can generate an excel table which tabulates the responses to bid factors and items for line items provided by all bidders.

To generate this file, open drop down from **“Go To”** box and select **“Analyze export”**.



6.4 Evaluation Process Management Feature

Step 2: Export Event Analysis File to Evaluation Team

- Once at the “**Analyze Export**” page you can export the Analysis by adding members of the evaluation team, or by sending only to yourself.
- After adding team members, click on “**Create Analysis Export**”

The System will send an XML file via email.

To open the XML file in excel follow these steps:

1. Save the XML file in your drive.
2. Open excel application.
3. Go to **File > Open** and select the **XML** file.
4. Open file. It will open in Excel.
5. Note that the Excel table may require some cleaning and re-formatting.

The screenshot shows the 'Atlas Finance' web application interface. The user is logged in as Roland Koxhaj. The page is titled 'Analyze Events' and displays event details for 'Registration test'. Below the event details, there is a table for 'Analysis Export File Recipients' with two entries: Roland Koxhaj and Dalal Abdulrazzaq. The 'Create Analysis Export' button is highlighted with a red box. Below the table, there are options to filter bids and bid responses, and a section for creating a bid analysis export with instructions.

Name	Email Address	Notify
1 Roland Koxhaj	roland.koxhaj@undp.org	<input checked="" type="checkbox"/>
2 Dalal Abdulrazzaq	dalal.abdulrazzaq@undp.org	<input checked="" type="checkbox"/>

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



Make sure you include only members of evaluation team. If not sure on the names, then include only yourself and forward from your email.



Click to return to Evaluation
of Bids main section

6.4 Evaluation process Management Module

Step 3: Evaluation Reports

Evaluation of the offers is conducted outside the system. This means that evaluation team has to verify and assess all information provided by bidders and make final conclusions. Any evaluation report, including narrative reports and scoring tables need to be developed, finalized, and signed outside the system.

Evaluation clarifications from bidders will be addressed in the traditional way (via email for example) and filed accordingly.

Once evaluation is complete and all supporting documentation is ready and available to procurement officer, he/she will upload this in the evaluation page for record purposes.



The Office may decide, as part of their internal SOPs, that a physical signature of evaluation reports is not necessary, given that there is an online signature functionality.

The system tracks who signed off and when and also when each of the uploaded document was added in the evaluation page and when. However, if evaluation panel includes a non-ATLAS user who cannot sign online, it is required that evaluation reports are signed physically, before being scanned and uploaded in the evaluation page in the system.



6.4 Evaluation process Management Module

Step 4 – Document evaluation process in the system

Once evaluation is completed and reports have been finalized and provided to procurement officer, he/she will upload to the evaluation page in the system.

To start, from the **Analyze Events** page, click on **“Evaluation Reports and Documents”** hyperlink

Analyze Events

[Analyze Total](#) [Analyze Line](#) [Review Constraints](#) [Award Summary](#) [Award Details](#) [Public Bid Opening Notification](#)

Business Unit: UNDP1 Event ID: 0000001973 Round: 1 Version: 6 Event Name: UNDP eTendering User Guide for Buyers (2018)

Event Format: Buy Event Type: RFx Currency: USD End Date: 15/02/2018 8:00AM EST Status: Pend Award Go To: ...

Bid Analysis and Display Options

Header: [] Sort Bids By: Total Event Score Sort Order: Descending Analyze

Weighting: [] Display Options: View Factor Responses [] Display Delta Responses [x] Display Disqualified Bids [x] Display Withdrawn Bidders

View Bid Actions: [x] All Bid Actions [] Award [] Counter [] Disallow [] Reject [] <No Action>

Analysis

Bidder Name	Wales Investment and Services Co. Ltd.	AlBarajoub Engineering	COMET AFRIQUE TELECOMS
Event Version:	3	3	3
Bid Number:	1	1	1
Total Bid Amount:	11.0000	11.0000	12.0000
Total Bid Cost:	11.00	11.00	12.00
Total Event Score:	100.0000	100.0000	99.8000
Total Header Cost:	0.00	0.00	0.00
Total Header Score:	0.0000	0.0000	0.0000
Attachments:	Download Bidder Files	Download Bidder Files	Download Bidder Files

Bid Action: [NA] [NA] [NA]

Reject Reason Code: [] [] []

Award by Percent: [] [] []

Factors

	Weighting	UOM	Ideal
Have you submitted the financial proposal as per the form and instructions provided in the solicitation documents. Financial Proposal must be submitted as a separate file encrypted with a password. None of the financial proposal data is disclosed in other documents of the submission. UNDP shall request password for opening the Financial Proposal only from the Proposers who pass the Technical Evaluation as per the criteria established and disclosed in the solicitation document. The Proposer shall assume the responsibility for not encrypting the financial proposal. DO NOT DISCLOSE YOUR PRICE IN THE LINE ITEMS. YOU MUST PUT PRICE AS 1 IN THE SYSTEM AND PROVIDE THE FINANCIAL PROPOSAL AS ENCRYPTED FILE AS EXPLAINED ABOVE.	0.00000		Y

Recalculate Add/Edit Factors **Evaluation Report and Documents** << < > >>



6.4 Evaluation process Management Module

Step 4 – Document evaluation process in the system

The procurement officer will:

1. Upload all documents related to evaluation process. Clearly named and marked. For practical reasons, it is recommended to group them in ZIP files.
2. Write main conclusions of the process. It is recommended that exact text is agreed by evaluation team in advance.
3. Inform evaluation team members that process is ready for sign off in the system. Normal email can be sent, or **“Notify Collaborator”** feature can be used.



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

Upload Attachments

Business Unit	Event ID	Event Round	Event Version	
ARM10	0000001981	1	3	Notify Collaborator

Attached File	Description	Add Attachment	View Attachment
1 evaluation_document_process_1.png	Composition of Evaluation Team	Add Attachment	View Attachment
2 evaluation_export_analysis_1.png	Evaluation Report_signed	Add Attachment	View Attachment
3 Evaluation_invite_collaborators_3.PNG	Bidder eval clarifications	Add Attachment	View Attachment

Summary of Evaluation Conclusions: Upon review of all bids received, and subsequent clarifications, Evaluation team concluded that the following "Bidder Guide " is recommended for award for full quantities/scope, for a total amount of USD 160,000. Award to be made on DAP INCOTERMS.

The following bidders were considered technically not compliant:

- Bidder Name 1
- Bidder Name 2
- Bidder Name 5

Evaluation was concluded on 21 March 2018

Collaborator Opid dalal.abdulrazzaq

Routing Sequence 2

Collaboration Award Status Pending

Email ID dalal.abdulrazzaq@undp.org

Description

☒ Evaluator SignOff

Collaborator Opid arvis.vilcins

Routing Sequence 3

Collaboration Award Status Pending

Email ID arvis.vilcins@undp.org

Description

☒ Evaluator SignOff

OK Cancel Refresh



6.4 Evaluation process Management Module

Step 4 – Document evaluation process in the system

Evaluation team members will:

1. Review all documents uploaded in the evaluation page in the system.
2. Review text included in the **“Summary of Evaluation conclusions”** box.
3. Sign off by selecting the **“Sign off”** button in the system. They can write individual comments if needed.
4. Click **OK**. The user will be directed to the Main Bid Analysis page. **Each user must then click on “Save” in order to save their actions.**
5. Click on **“Complete Analysis”** button to mark that they completed their input.



Users can add attachments or edit text in the summary box. However, for practical reasons, it is recommended that these actions are only made by the procurement officer. Changes which are made simultaneously by several users cannot be saved by the system.



Click to return to Evaluation
of Bids main section

Business Unit: ARM10, Event ID: 0000001981, Event Round: 1, Event Version: 3

Attached File	Description	Add Attachment	View Attachment
1 evaluation_document_process_1.png	Composition of Evaluation Team	Add Attachment	View Attachment
2 evaluation_export_analysis_1.png	Evaluation Report_signed	Add Attachment	View Attachment
3 Evaluation_invite_collaborators_3.PNG	Bidder eval clarifications	Add Attachment	View Attachment

Summary of Evaluation Conclusions:

Upon review of all bids received, and subsequent clarifications, Evaluation team concluded that the following "Bidder Guide" is recommended for award for full quantities/scope, for a total amount of USD 160,000. Award to be made on DAP INCOTERMS.

The following bidders were considered technically not compliant:

- Bidder Name 1
- Bidder Name 2
- Bidder Name 5

Evaluation was concluded on 21 March 2018.

Collaborator Opid: dalal.abdulrazzaq

Routing Sequence: 2

Collaboration Award Status: Pending

Email ID: dalal.abdulrazzaq@undp.org

Description:

☒ Evaluator SignOff

Collaborator Opid: arvis.vilcins

Routing Sequence: 3

Collaboration Award Status: Pending

Email ID: arvis.vilcins@undp.org

Description:

OK Cancel Refresh

6.4 Evaluation process Management Module

Step 4 – Document evaluation process in the system

The procurement officer will:

1. Review and ensure that all members have signed off.
2. Make a PDF print out of the page for external use, e.g. to file externally, or share with review committees or managers, etc.
3. Proceed with the next step of the process accordingly (CAP/ACP reviews, Contract award, etc.)

The screenshot displays the 'Collaborator Evaluation page' in the Atlas Finance system. At the top, there's a navigation bar with 'AtlasFinance' logo and a welcome message for Dalal Abdulrazzaq. Below this, a menu bar includes 'Favorites', 'Main Menu', 'eTendering', 'Maintain Events', 'Event Workbench', and 'Analyze Events'. The main content area is titled 'Collaborator Evaluation page' and 'Upload Attachments'. It shows a table with columns for 'Business Unit', 'Event ID', 'Event Round', and 'Event Version'. Below the table, there's a 'Summary of Evaluation Conclusions' section. This section contains a 'Scroll Area' with a table of collaborators, including 'arvis.vilcins', 'dalal.abdulrazzaq', and 'roland.koxhaj'. Each collaborator has a 'Routing Sequence', 'Collaboration Award Status', and 'Evaluator SignOff' checkbox. The 'Description' field for each collaborator is currently empty. At the bottom of the page, there are 'OK', 'Cancel', and 'Refresh' buttons.



Please note: System allows that each user can add attachments or edit text in the summary box. However, for practical reasons, it is recommended that these actions are done only by the procurement officer facilitating the process. System will not be able to save changes done simultaneously by several users.



6.4 Evaluation process Management Module

General Remarks on eTendering feature controls and Audit trail

If any of the members of the evaluation team has signed off online, system does not allow any other user to make more changes. If changes need to be made in the system, all users have to de-select the “Sign off” box.

System allows procurement officer to add (but not remove) more documents in the evaluation page. This is intended to allow procurement officer to document and archive post-qualification process as relevant. System records in [this query](#) any changes made to the uploaded documents in this page.

System allows the procurement officer facilitating the process to sign on behalf of any of the members. This however should be used only in exceptional cases, and in all cases there must be an email proof that the evaluator agreed with the evaluation outcome and authorized procurement officer to sign on his/her behalf. Such email must be uploaded in the evaluation page.

System tracks and records in [this query](#) every time that an evaluator signs on and off in the system, including when procurement officer signs off on behalf of an evaluation team member.



Click to return to Evaluation
of Bids main section



[Click to return to TOC](#)

7.0 Tender Award from the System

This section actions that need to be taken in order to create the Purchase Order from the eTendering system directly and close the event so it reflect the correct status.

It is very important to us the system fully, including creation of Purchase Orders as it brings significant benefits, both in terms of streamlining process - vendors and POs are created automatically – but also for better statistics and monitoring of procurement processes as you can then link all PO to corresponding tender cases.

[7.1 Identify awarded bidder](#)

[7.2 Specify Awarded quantities](#)

[7.3 Create vendor and Purchase Order](#)

[7.4 Close event manually \(when no award made or only partial award\).](#)

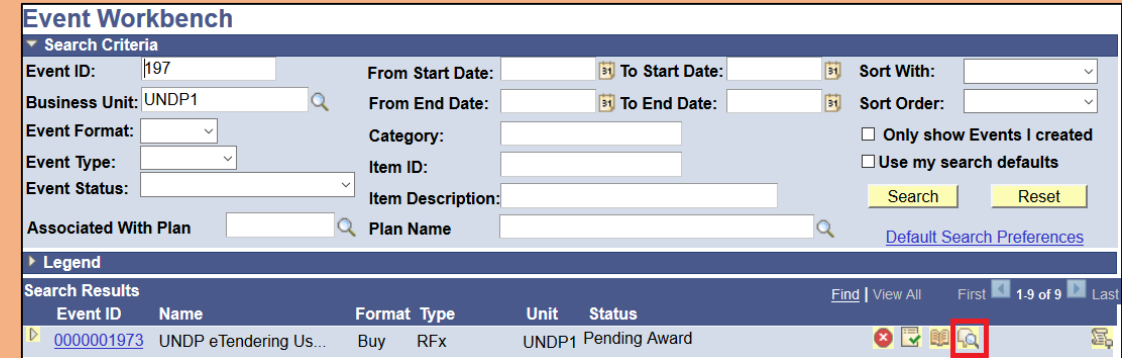
[7.5 Publish Award.](#)

7.1 Identify Awarded Bidder

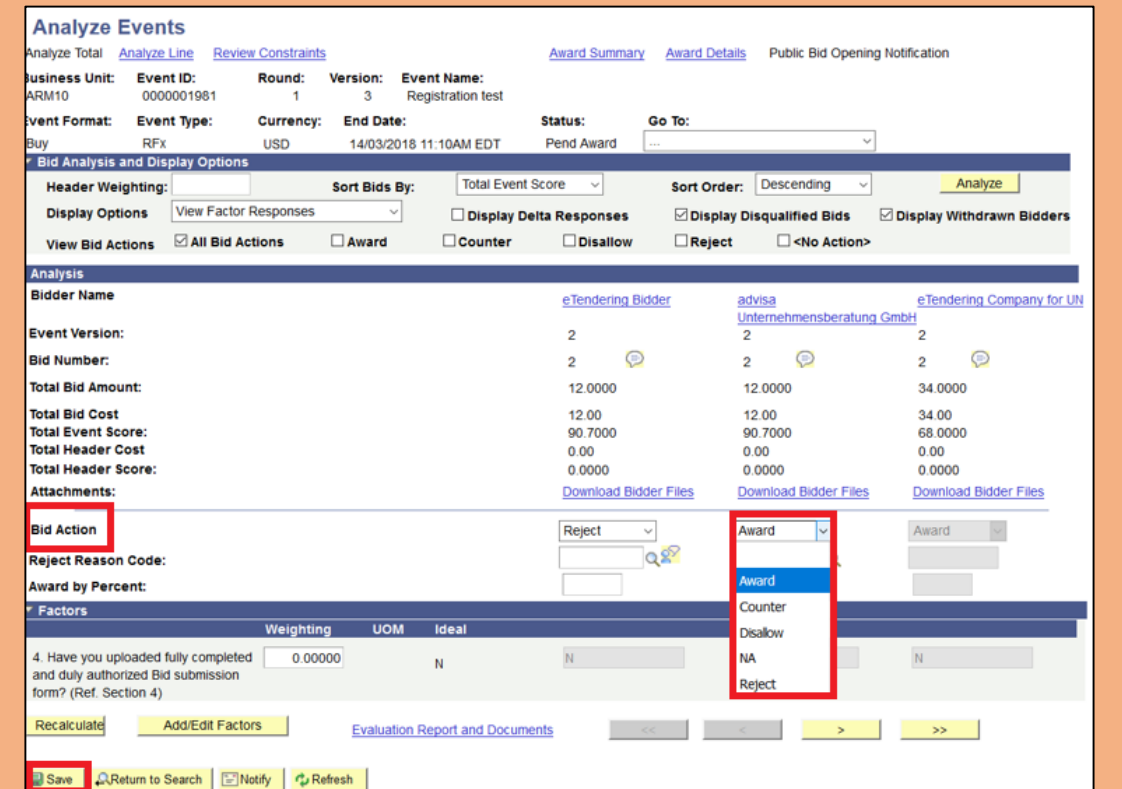
Once the evaluation has been completed and all the required approvals are obtained, the procurement officer managing the case must reflect the final outcome of the process in the eTendering system.

To award the bidder, navigate to the **Main Menu** → **eTendering** → **Maintain Events** → **Event Workbench**. Search for the event ID and click on the “**Analyze Events**” icon.

Once at the **Analyze Events** page, the Buyer can indicate the award status for each bidder, based on the outcome of the evaluation process.



The Event Workbench search criteria form includes fields for Event ID (197), Business Unit (UNDP1), Event Format, Event Type, Event Status, From Start Date, To Start Date, From End Date, To End Date, Sort With, Sort Order, Category, Item ID, Item Description, Associated With Plan, and Plan Name. It also has checkboxes for 'Only show Events I created' and 'Use my search defaults', and buttons for 'Search' and 'Reset'. A 'Default Search Preferences' link is also present.



The Analyze Events page displays a table of bidders with columns for Bidder Name, Event Version, Bid Number, Total Bid Amount, Total Bid Cost, Total Event Score, Total Header Cost, Total Header Score, Attachments, Bid Action, Reject Reason Code, and Award by Percent. The table shows three bidders: eTendering Bidder, advisa Unternehmensberatung GmbH, and eTendering Company for UN. The Bid Action dropdown menu is open, showing options: Award, Counter, Disallow, NA, and Reject. The 'Award' option is selected. The page also includes buttons for 'Recalculate', 'Add/Edit Factors', 'Evaluation Report and Documents', 'Save', 'Return to Search', 'Notify', and 'Refresh'.



7.1 Identify Awarded Bidder

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

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

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

Splitting Awards

Indicate for each bid if it is **Awarded**, **Rejected**, or **Not Awarded (NA)**. It is possible to select **Award** for several bidders, in case of split award.

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

Analyze Events

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

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

Event Format: Buy Event Type: RFX Currency: USD End Date: 06/06/2016 10:00 EDT Status: Pend Award Go To: [dropdown]

Bid Analysis and Display Options

Header Weighting: [input] Sort Bids By: Total Event Score Sort Order: Descending Analyze [button]

Display Options: View Factor Responses [input] Display Delta Responses [input] Display Disqualified Bids [input] Display Withdrawn Bidders

View Bid Actions: [input] All Bid Actions [input] Award [input] Counter [input] Disallow [input] Reject [input] <No Action>

Analysis

Bidder Name	Test Elisabet 4	Elisabet Test 5	Test Elisabet 2016 1
Event Version:	1	1	1
Bid Number:	1	1	2
Total Bid Amount:	200.0000	250.0000	260.0000
Total Bid Cost:	200.00	250.00	260.00
Total Event Score:	100.0000	75.6000	70.7000
Total Header Cost:	0.00	0.00	0.00
Total Header Score:	0.0000	0.0000	0.0000

Bid Action

Award [dropdown] NA [dropdown] Reject [dropdown]

Reject Reason Code: [input] [input] [input]

Award by Percent: [input] [input] [input]



Award by Percent: Buyers can enter 100 in this field to award one bidder. To split an award between two bidders, enter 50 for each bidder. **Please note two important points with this feature:** 1) If you are splitting an award by line item, it is not possible to use the **award by percent** field. 2) If 100 is entered to award one bidder, it is not possible to modify this action easily at a later stage if the buyer changes their decision.

7.2 Specify Awarded Quantities

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

Specify the quantities to be awarded for each line, and then ***“Save”***.

Please note the following:

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

Analyze Events

[Analyze Unit](#)
[Analyze Line](#)
[Review Constraints](#)
[Award Summary](#)
[Award Details](#)
[Public Bid Opening Notification](#)

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

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

Line	Item ID	Description	Requested Qty	Event Price	Extended Amount	Award Quantity	Award Amount	Quantity Remaining	Line Status
1	739900	Training, other	1.0000	405.000000	405.0000	1.0000	200.0000	0.0000	<input type="text"/>
	<input type="checkbox"/>	Select	Name	Awarded Qty	Total Line Amount	Extended Amount			
	<input type="checkbox"/>		Test Elisabet 4	1.0000	200.00000	200.0000			

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

Event Award Summary:	Total Awarded Qty	Total Awarded Price	Quantity Remaining
<input type="button" value="Recalculate"/>	1.0000	200.0000	0.0000

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



[Click to return to Tender Award main section](#)

7.3 Create vendor & Purchase Order

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

Check for duplicate vendor

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

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

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

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



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

Analyze Events

Analyze Total

Analyze Line

Review Constraints

Award Summary

Award Details

Public Bid Opening Notification

Business Unit:

Event ID:

Round:

Version:

Event Name:

UNDP1

0000000664

1

2

UNDP eTendering User Guide 2016

Event Format:

Event Type:

Currency:

End Date:

Status:

Go To:

Buy

RFx

USD

06/06/2016 10:00 EDT

Pend Award

Show Award Details to Bidders

☒ Display bids

☐ Display all bids

☐ Display bid scores

☐ Display bid's total bid price

☒ Display factors

Award Details

First1 of 1Last

Bidder Name:

Bidder Type:

Buyer:

Test Elisabet 4

Bidder

elisabet.lundqvist

Award Type:

Award Currency:

Terms:

Purchase Order

Event

USD

PO Business Unit:

Award Number:

Total Award:

1

200.0000

Award Lines

Line	Item ID	Vndr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price
1	739900	<input checked="" type="checkbox"/>	Training, other	EA	1.0000	200.0000	200.0000

Create Vendor

Save

Return to Search

Notify

Refresh



Click to return to Tender
Award main section

7.3 Create vendor & Purchase Order

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

If the company already exists as a vendor in the database, continue to link the bidder with the vendor profile, as described in section [Link vendor to bidder](#).

If the company does not exist as a vendor, proceed to create the vendor through eTendering as described in section [Create new vendor from bidder](#).



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



7.3 Create vendor & Purchase Order

Link Vendor to Bidder

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

Analyze Events

Analyze Total

Analyze Line

Review Constraints

Award Summary

Award Details

Public Bid Opening Notification

Business Unit: UNDP1

Event ID: 0000000664

Round: 1

Version: 2

Event Name: UNDP eTendering User Guide 2016

Event Format: Buy

Event Type: RFx

Currency: USD

End Date: 06/06/2016 10:00 EDT

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

Bidder Name	Test Elisabet 4	Elisabet Test 5	Test Elisabet 201
Event Version:	1	1	1
Bid Number:	1	1	2
Total Bid Amount:	200.0000	250.0000	260.0000
Total Bid Cost	200.00	250.00	260.00
Total Event Score:	100.0000	75.6000	70.7000

Bidder Information

Bidder ID: 0000011552

ShortName: Elisabet Test

Name: Elisabet Test 5

Location: MAIN

Details

Name: Elisabet Test 5

Title:

Country: USA United States

Address 1: test

Address 2:

Address 3:

Address 4:

City: test

County:

State: NY

URLID:

Email ID: elisabet.lundqvist@undp.org

Prefix:

Phone: 123456789

Ext:

Prefix:

Fax:

Postal:

View Internet Address

OK

Cancel

Refresh

Click to return to Tender Award main section

UNDP eTendering User Guide for Buyers (April 2018)

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

114

7.3 Create vendor & Purchase Order

Link Vendor to Bidder

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

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



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



Atlas Finance Welcome Roland Koxhaj, Your Atlas Finance Last Login Datetime : 15.Dec.2

Favorites Main Menu > Vendors > Vendor Information > Add/Update > Vendor

Summary Identifying Information Address Contacts Location Custom

User Definable Vendor Fields

SetID: UNDP1

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

Vendor Field C30 A		Vendor Field C30 F	
Vendor Field C30 B		Vendor Field C30 G	
Bidder ID	0000001389	Vendor Field C30 H	
Vendor Field C30 D		Vendor Field C30 I	
Vendor Field C30 E		Vendor Field C30 J	

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History

Summary | Identifying Information | Address | Contacts | Location | Custom



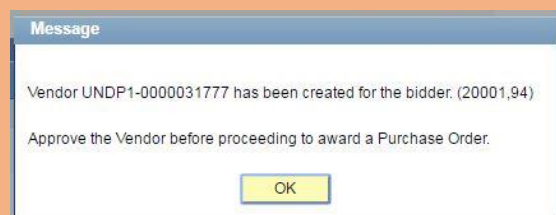
Click to return to Tender
Award main section

7.3 Create vendor & Purchase Order

Create new vendor from bidder

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

Note down the vendor ID and click **OK**.



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

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



Click to return to Tender Award main section

The screenshot shows the 'Analyze Events' page. At the top, there are tabs: 'Analyze Total', 'Analyze Line', 'Review Constraints', 'Award Summary', 'Award Details', and 'Public Bid Opening Notification'. Below these, there are fields for 'Business Unit' (UNDP1), 'Event ID' (0000000664), 'Round' (1), 'Version' (2), and 'Event Name' (UNDP eTendering User Guide 2016). There are also fields for 'Event Format' (Buy), 'Event Type' (RFx), 'Currency' (USD), 'End Date' (06/06/2016 10:00AM EDT), 'Status' (Pend Award), and a 'Go To' dropdown. A section titled 'Show Award Details to Bidders' contains checkboxes for 'Display bids' (checked), 'Display all bids', 'Display bid scores', 'Display bid's total bid price', and 'Display factors'. Below this is the 'Award Details' section, which includes 'Bidder Name' (Test Elisabet 4), 'Bidder Type' (Bidder), 'Buyer' (elisabet.lundqvist), 'Award Type' (Purchase Order), 'Award Currency' (Event), 'USD', 'Terms', 'PO Business Unit' (UNDP1, highlighted with a red box), 'Award Number' (1), and 'Total Award' (200.0000). At the bottom is the 'Award Lines' table with columns: Line, Item ID, Vndr/Item Rel, Item Description, UOM, Award Quantity, Awarded Price, and Extended Price. The first row shows Line 1, Item ID 739900, Vndr/Item Rel checked, Item Description Training other, UOM EA, Award Quantity 1.0000, Awarded Price 200.0000, and Extended Price 200.0000. A 'Create Vendor' button is highlighted with a red box at the bottom right.The screenshot shows the 'Add/Update Vendor' page. At the top, there are tabs: 'Summary', 'Identifying Information', 'Address', 'Contacts', 'Location', and 'Custom'. The 'Identifying Information' tab is selected. The page contains fields for 'SetID' (UNDP1), 'Vendor ID' (0000031777), '*Vendor Short Name' (TEST ELISA), '*Vendor Name 1' (Test Elisabet 4), 'Vendor Name 2', '*Status' (Unapproved, highlighted with a red box), '*Classification' (Supplier), '*Persistence' (Regular), 'HCM Class', 'Gender' (Male/Female), and 'Nationality'. There are also checkboxes for 'VAT Registration', 'Withholding', and 'Open For Ordering'. At the bottom right, there are 'Expand All' and 'Collapse All' buttons.

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

7.3 Create vendor & Purchase Order

Create Purchase Order

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

The button that was previously called “**Create Vendor**” will now have changed to “**Post Award**”.

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

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

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

From the new PO page, any changes can be made as necessary. **For Pos created from eTendering buyer needs to click the “Approve PO” button to change the status from “Open” to “Pending Approval”.**



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

The screenshot shows the 'Analyze Events' interface with the following details:

- Analyze Events** header with tabs: [Analyze Total](#), [Analyze Line](#), [Review Constraints](#), [Award Summary](#), [Award Details](#), [Public Bid Opening Notification](#).
- Business Unit:** UNDP1, **Event ID:** 0000000664, **Round:** 1, **Version:** 2, **Event Name:** UNDP eTendering User Guide 2016.
- Event Format:** Buy, **Event Type:** RFx, **Currency:** USD, **End Date:** 06/06/2016 10:00AM EDT, **Status:** Pend Award, **Go To:** [dropdown].
- Show Award Details to Bidders** section with checkboxes: ☒ Display bids, ☐ Display all bids, ☐ Display bid scores, ☐ Display bid's total bid price, ☒ Display factors.
- Award Details** section with fields: **Bidder Name:** Test Elisabet 4, **Bidder Type:** Bidder, **Buyer:** elisabet.lundqvist, **Award Type:** Purchase Order, **Award Currency:** Event (highlighted with a red box), **PO Business Unit:** UNDP1 (highlighted with a red box), **Terms:** [searchable], **Award Number:** 1, **Total Award:** 200.0000.
- Award Lines** table:

Line	Item ID	Vendr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price
1	739900	<input checked="" type="checkbox"/> (highlighted with a red box)	Training other	EA	1.0000	200.0000	200.0000
- Post Award** button (highlighted with a red box).
- Footer buttons: [Save](#), [Return to Search](#), [Notify](#), [Refresh](#).



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

7.3 Create vendor & Purchase Order

Non Award Notifications

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

- NA (Not Awarded)
- Rejected

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

Non-Award Notification

This is an automatic notification from the eTendering system to inform that you have not been awarded for the Tender referred below. The award, if it is above USD 100,00, will be published in the UNDP website: http://procurement-notices.undp.org/view_awards.cfm. If you need further clarifications, please contact the UNDP focal point for this Tender.

Cet e-mail est une notification automatique du système d'appel d'offres eTendering pour vous informer que le contrat indiqué ci-dessous ne vous a pas été attribué. L'attribution, si elle dépasse 100 000 USD, sera publiée sur le site internet du PNUD : http://procurement-notices.undp.org/view_awards.cfm. Pour toute information complémentaire, veuillez contacter le point focal du PNUD pour cet appel d'offres.

Este es un aviso automático del sistema de eTendering para informarle de que usted no ha conseguido ninguna concesión para la Licitación indicada más abajo. La concesión, de superar los 100.00 USD, será publicada en la página web de PNUD: http://procurement-notices.undp.org/view_awards.cfm. Si necesita cualquier aclaración, póngase en contacto con el centro de coordinación de PNUD para esta Licitación.

Данным автоматическим уведомлением системы eTendering сообщаем вам, что указанный ниже тендер не был вам присужден. Присуждения стоимостью более 100 долл. США будут опубликованы на веб-сайте UNDP: http://procurement-notices.undp.org/view_awards.cfm. Если вам необходима дополнительная информация, обратитесь к координатору UNDP по вопросам этого тендера.

这是一个从eTendering系统来的自动通知，知会您还没有被授予的以下所示的投标。这批出标书，如果是在100,00美元以上，它会在UNDP的网站上被发布：http://procurement-notices.undp.org/view_awards.cfm。如果您需要关于本投标的进一步说明，请联系UNDP的协调中心。

إذا كنت تحتاج إلى مزيد من التفاصيل، يرجى الاتصال بالنقطة البؤرية لبرنامج الأمم المتحدة الإنمائي. سيتم الإعلان على الموقع الإلكتروني لبرنامج الأمم المتحدة الإنمائي عن الجائزة إذا كانت قيمتها تزيد عن 100,00 دولار أمريكي (UNDP). هذا إخطار تلقائي يرسل من نظام المزايدات الإلكترونية لإخبارك بأنه قد حصلت على جائزة من المطاء المشار إليه أدناه. سيتم الإعلان على الموقع الإلكتروني لبرنامج الأمم المتحدة الإنمائي إذا كنت تحتاج إلى مزيد من التفاصيل. يرجى الاتصال بالنقطة البؤرية لبرنامج الأمم المتحدة الإنمائي.

Event Details

Event ID: UNDP1 - 0000001301 Round 1 Version 2
Name: PSU Demo 2017



eTendering does not send any award notification to the awarded bidder. The procurement focal point must contact the awarded bidders directly.



Click to return to Tender
Award main section

7.4 Close event manually (for no award or only partial award)

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

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

Change the status of each line item from **O (Open)** to **C (Closed)** and click on “**Save**”. Depending on how the quantities have been awarded, the status of the event will be either:

- **Awarded:** If the some of requested quantity is allocated to one or more bidders.
- **Not Awarded:** If no bidder or quantity is indicated as awarded.

Analyze Events

[Analyze Total](#) [Analyze Line](#) [Review Constraints](#) **Award Summary** [Award Details](#) [Public Bid Opening Notification](#)

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

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

Line	Item ID	Description	Requested Qty	Event Price	Extended Amount	Award Quantity	Award Amount	Quantity Remaining	Line Status
1	739900	Training, other	1.0000	405.000000	405.0000	1.0000	200.0000	0.0000	O

Select	Name	Awarded Qty	Total Line Amount	Extended Amount
<input type="checkbox"/>	Test Elisabet 4	1.0000	200.00000	200.0000

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

Event Award Summary:

Total Awarded Qty	Total Awarded Price	Quantity Remaining
1.0000	200.0000	0.0000

[Recalculate](#)

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



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



7.5 Publish Award

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

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

Analyze Events

[Analyze Total](#) [Analyze Line](#) [Review Constraints](#) **Award Summary** [Award Details](#) [Public Bid Opening Notification](#)

Business Unit: UNDP1 **Event ID:** 0000000664 **Round:** 1 **Version:** 2 **Event Name:** UNDP eTendering User Guide 2016
Event Format: Buy **Event Type:** RFx **Currency:** USD **End Date:** 06/06/2016 10:00 EDT **Status:** Pend Award **Go To:**

Line	Item ID	Description	Requested Qty	Event Price	Extended Amount	Award Quantity	Award Amount	Quantity Remaining	Line Status					
1	739900	Training, other	1.0000	405.000000	405.0000	1.0000	200.0000	0.0000	<input type="checkbox"/>					
<div><div>Select</div><div>Name</div><div>Awarded Qty</div><div>Total Line Amount</div><div>Extended Amount</div></div> <table><tbody><tr><td><input type="checkbox"/></td><td>Test Elisabet 4</td><td>1.0000</td><td>200.00000</td><td>200.0000</td></tr></tbody></table>										<input type="checkbox"/>	Test Elisabet 4	1.0000	200.00000	200.0000
<input type="checkbox"/>	Test Elisabet 4	1.0000	200.00000	200.0000										

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

Event Award Summary:

	Total Awarded Qty	Total Awarded Price	Quantity Remaining
Recalculate	1.0000	200.0000	0.0000

Save

Return to Search

Notify

Refresh



Click to return to Tender
Award main section



Click to return to TOC

8.0 eTendering Queries & Reports

Several queries have been developed that capture and report on various system activity. The list below shows some of the queries that can be generated. Additional queries will be developed in the future so users are encouraged to follow news and updates in the [eTendering Yammer group](#).

[8.1 Capture Bidder Details, Basic Event details & Bidder activity](#)

[8.2 Capture Line Item and Bid Factor activity for an event](#)

[8.3 Capture Evaluation and Event Analysis activity](#)

[8.4 Capture Purchase Order & eTendering Event/Usage Data](#)

[8.5 Review Bidder Profiles & Search Bidder Activity](#)



More queries will be developed continuously. Follow eTendering Yammer group for updates.

8.1 Capture Bidder Details, Basic Event Details & Bidder Activity

Query Purpose	Query Name	Description
Participating bidders' details	UN_ETENDERING_BIDDER	<p>Captures all bidders that have accepted invitations in the system. It can be used to extract all company names interested in a particular tender, including their contact details.</p> <p>Entering % in the Event ID filter will capture the information for all tenders in a specific BU. Country Office can use this information to get a list of bidders participating in their tenders.</p> <p>Entering % in the country field will capture all bidders. If interested in bidders from a specific country only, enter country code in this field.</p>
Event details; approver and event creator activity	UN_EVENT_CREATE_DETAILS	<p>Captures main event data and actions including when and who created the event, when and who posted it for approval, when and who approved the event.</p> <p>It captures also main information such as start and end dates, event title, etc.</p>
Bidder Event Participation History	UNDP_ETEND_BIDDER_RESP	<p>Captures which bidder has saved and/or posted a bid against a specific event, including time stamps.</p> <p>Can be used to track bidders participation, follow up on cancelled bids when editing line items and bid factors, and respond to bidders if they claim to have posted a bid.</p> <p><i>This query is not available as a public query. Contact Emma Barredo to get access to it as an individual query.</i></p>



Click to return to Queries
main section

8.2 Capture Event Line Item & Bid Factor Activity

Query Function	Query Name	Description
Line item activity	UN_ET_LINE_VERSION_EDIT	Captures the information in the line items of a specific event. Can be used to track if any changes were made to the line items in the different versions of an event.
Header Bid Factors activity	UN_ET_HEADER_BIDFCTR_EDIT	Captures the information in the header bid factors of a specific event. Can be used to track if any changes were made to the header bid factors in the different versions of an event.
Line Items Bid Factor Activity	UN_ET_LINE_BIDFCTR_EDIT	Captures the information in the line item bid factors of a specific event. Can be used to track if any changes were made to the line item bid factors in the different versions of an event
To search tenders by item	UN_ET_ITEM_SEARCH	<p>Can be used to find tenders from other UNDP COs for specific item or item category. Can be useful to utilize other ToR and specifications.</p> <p>Can be search by item ID or description. Recommend to split search in time periods to make the search results shorter and more manageable.</p> <p><i>This query is not available as a public query. Contact Emma Barredo to get access to it as an individual query.</i></p>



Click to return to Queries
main section

8.3 Capture Event Analysis & Evaluation Activity

Query Function	Query Name	Description
Bid Analysis Page Views	UN_ET_EVENT_ANALYZE_PAGE_DATA	Capturer name of users who have views the bid analysis page for a specific event.
File Download and Public Bid Opening report	UN_ET_FILE_DOWNLOAD_DATA	Captures who download bidder files for a specific event. It captures also who generates the Public Bid Opening Report.
Evaluation Page Views	UN_ET_EVALUATION_PAGE_REPORT	Captures who visits the evaluation page of a specific event.
Evaluation Sign Off activity	UN_ET_COLLABORATOR_SIGNOF_DATA	Captures when an evaluator signs off an evaluation report for a specific event. It captures also when the procurement officer signs off on behalf of another evaluator.
Evaluation attachments activity	UN_ET_EVALUATION_ATTHMNT_AUDIT	Captures who uploads or removes attachments from the evaluation page of a specific event.



Click to return to Queries
main section

8.4 Capture Purchase Order & eTendering Event Data

Query Function	Query Name	Description and Purpose
Purchase Orders created on eTendering	UN_ETENDERING_EVENT_PO	<p>Captures the information from eTendering events and Purchase Orders created from eTendering. Can be used to generate useful statistics.</p> <p><i>This query is not available as a public query. Contact Emma Barredo to get access to it as an individual query.</i></p>
eTendering event data	UNDP_ETENDERING_DETAILS_9	<p>Captures all data related to issued events. Can be used to generate useful statistics on the usage of eTendering. Further data processing is needed.</p> <p><i>This query is not available as a public query. Contact Emma Barredo to get access to it as an individual query.</i></p>



Click to return to Queries
main section

8.5 Review Bidder Profiles & Search Bidder Activity

Search Profiles

To search and review a Bidder profile, navigate to *eTendering* → *Event Responses* → *Maintain Bidder Profiles*.

Search for the Bidder by using the **Company Name** field and selecting the “contains” filter. Enter part or all of the company name here and then click on “**Search**”. The results will be displayed as shown below.

Bidder Profile Statuses – Active, Inactive, Complete, Blank

Take note of the **Status as of Effective Date** columns. An “**Active**” status means that the bidder registration is complete and can be invited to a tender. If it shows as “**Inactive**”, it means profile has been deactivated and will not appear in the search when inviting bidders to an event.

Take note also on **Approval Status**. A “**Complete**” status indicates that the bidder has successfully registered and activated their online bidder profile. If it is blank, that bidder did not complete registration process.

Maintain Bidder

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

SetID:

begins with

Bidder ID:

begins with

Status as of Effective Date:

=

Approval Status:

=

Bidder Type:

=

Company Name:

contains

UNDP

Search

Clear

Basic Search

Save Search Criteria

Search Results

View All

First1-27 of 27Last

SetID	Bidder ID	Status as of Effective Date	Approval Status	Bidder Type	Company Name
UNDP1	0000006990	Active	Complete	Business	Gagik-UNDP
UNDP1	0000007108	Active	Complete	Business	Mostaq UNDP Bangladesh
UNDP1	0000031510	Active	Complete	Business	Test Company UNDP
UNDP1	0000017505	(blank)	(blank)	Business	Test for UNDP Indonesia CO Procurement

Search Results					
View All					
First1-2 of 2Last					
SetID	Bidder ID	Status as of Effective Date	Approval Status	Bidder Type	Company Name
UNDP1	0000011404	Inactive	Complete	Business	Emptor International AS
UNDP1	0000011861	Active	Complete	Business	Emptor International AS

Click to return to Queries
main section

UNDP eTendering User Guide for Buyers (April 2018)


126

8.5 Review Bidder Profiles & Search Bidder Activity

Review and Update Bidder Profile Information

To review Bidder profile information, [search for the correct bidder profile](#), and from the search results, click on the relevant Bidder ID hyperlink.

To review the Bidder Address details or add a new address, click on the **Addresses** tab. To review and update the User contact information, or add a new User, click on the **Contacts** tab.



Important: Although Buyers are able to modify Bidder profile details, it is recommended that Bidders make this change directly themselves on eTendering. For more information on how, click on the FAQ icon on this page.

If a Bidder has duplicate bidder profiles registered (as shown in the screenshot below), and they are requesting assistance with account reactivation, contact PS Support at ps.support@undp.org for assistance

Search Results					
View All First 1-4 of 4 Last					
SetID	Bidder ID	Status as of Effective Date	Approval Status	Bidder Type	Company Name
UNDP1	0000031509	Active	Complete	Business	eTendering Bidder
UNDP1	0000030857	Active	Complete	Business	eTendering Bidder Guide

MainAddressesContactsIdentifications

SetID UNDP1Bidder ID 0000030857

Company eTendering Bidder Guide

AddressesFindView AllFirst 1 of 1Last

☒ Main Address☒ Ship To Address

☒ Bill To Address☒ Invoice Address

Address Details

Country: DenmarkChange Country

*Address 1: Marmovej 51

Address 2:

Address 3:

Address 4:

*City: CopenhagenPostal:

Region:

Add a New AddressDelete

SaveReturn to Search

Main | Addresses | Contacts | Identifications

MainAddressesContactsIdentifications

SetID UNDP1Bidder ID 0000030857

Company eTendering Bidder Guide

User InformationFindFirst 1 of 1Last

First NameUser

Last NameOne

TitleExecutive Director

Email IDxxxxxx@undp.org

Telephone12341234Ext

Fax

Address1Main Address

User ID eTendering.BidderGuide

Add ContactDelete

SaveReturn to Search

Main | Addresses | Contacts | Identifications

Search Results					
View All First 1 of 6 Last					
SetID	Bidder ID	Status as of Effective Date	Approval Status	Bidder Type	Company Name
JNDP1	0000017331	Active	Complete	Business	ABC
JNDP1	0000022473	Active	Complete	Business	ABC
JNDP1	0000008563	Active	Complete	Business	ABC Co., Ltd.
JNDP1	0000002793	(blank)	(blank)	Business	ABC Company
JNDP1	0000002794	(blank)	(blank)	Business	ABC Company
JNDP1	0000002795	Active	Complete	Business	ABC Company



Click to return to Queries
main section



8.5 Review Bidder Profiles & Search Bidder Activity

Search Bidder Activity

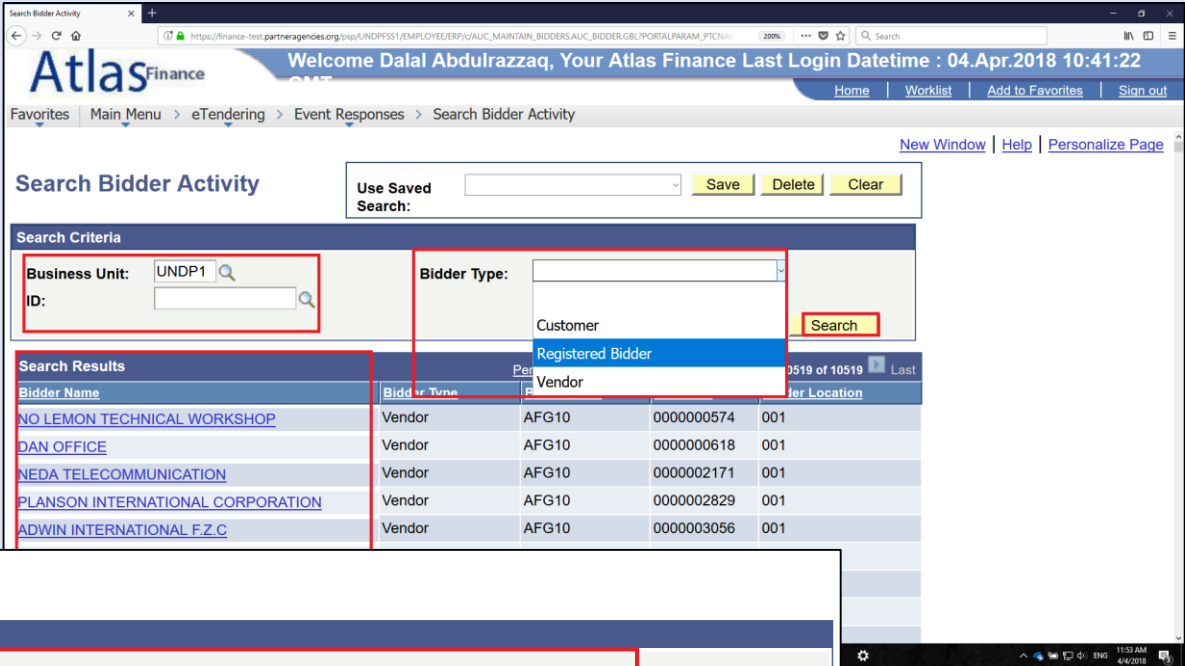
To search a Bidder’s Activity, go to **eTendering**
→ **Event Responses** → **Search Bidder Activity**.

You can search by selecting the **Bidder type**, or entering the **Business Unit** and **Bidder ID** and clicking on **Search**.

To view the activity details, click on the relevant hyperlinked Bidder name in the search results.

The Buyer can review the events a bidder has been invited to, Events Bid on and Events Awarded by clicking on the relevant hyperlinked number.

A complete list of events that the Bidder has participated in will also be listed below.



First bidder

Event Activity Summary

Click on number to view events below

Events Invited To: [7](#)Events Bid On: [1](#)Events Awarded: [0](#)

Search Criteria

Event Format: Events Invited ToEvents Bid OnEvents Awarded

Event Type: Date Range: From: 31Through: 31

Search

Legend

Event ID	Format	Event Name	Event Status	Start Date	End Date	Status
IRQ10-RFQ 388-17	Buy	Rehabilitation of Bathnaya Shops	Posted	14/09/2017 10:40AM EDT	05/10/2017 7:00AM EDT	
STP10-GP290491	Buy	RDT for Malaria - UNDP Sao Tome & Principe	Posted	12/07/2010 5:06AM EDT	23/07/2010 5:06AM EDT	
IRQ10-ITB 377	Buy	ITB 377/17 Rehabilitation of 9 Schools in Mosul	Posted	10/09/2017 6:49AM EDT	25/09/2017 7:00AM EDT	
IRQ10-ITB 385/17	Buy	ITB 385/17	Posted	14/09/2017 5:01AM EDT	01/10/2017 7:00AM EDT	
SDN10-GP292258	Buy	Request for Offers/Quotations for	Posted	12/07/2010 8:06AM EDT	23/07/2010 8:06AM EDT	

Any events a bidder has participated in will only be recorded under the Awarded section if a PO was created from eTendering.


Click to return to Queries
main section



[Click to return to TOC](#)

9.0 Helpdesk Support and FAQs

This section provides details on who to contact for technical assistance, how to address some commonly asked questions and where to find additional resources on eTendering.

[9.1 eTendering Resources](#)

[9.2 Helpdesk Support Workflow](#)

[9.3 Frequently Asked Questions](#)

9.1 eTendering Resources

In addition to this User Guide, which should be referred to as a key resource by UNDP procurement personnel implementing eTendering, the following helpful resources are available to eTendering Users:

1. eTendering Intranet webpage

To view a complete list of resources on eTendering, including user guides for bidders and users, presentations, webinar recordings and announcements on trainings, eTendering users can refer to the eTendering webpage on the UNDP Intranet:

<https://intranet.undp.org/unit/oolts/oso/psu/etendering/SitePages/Intranet.aspx>

2. Public UNDP website with eTendering resources for bidders:

<http://www.undp.org/content/undp/en/home/operations/procurement/business/procurement-notice/resources/>

This webpage is available to individuals or companies who wish to participate in a tender that is being launched on eTendering. Resources include an eTendering manual for Bidders that is available in English, French, Spanish and Russian. In addition, bidders can view instructional videos on how to register for an eTendering bidder profile and submit a bid on eTendering. The videos are available in English, French and Spanish and are subtitled in Russian, Chinese and Arabic.

3. Helpdesk support cases

For any system technical related issue, you can write directly to PS Support at ps.support@undp.org.

Users are strongly encouraged to consult this document and other available resources when in need to understand or respond to a specific scenario. The instructions and FAQs in this document cover all aspect. For any issue that still remains not clear, you can consult with other procurement colleagues in [eTendering Yammer group](#). If you need additional advise, you can contact also the PSU Procurement Regional Advisor for your region.



9.2 Helpdesk Support Workflow

To effectively support Bidders experiencing technical issues with eTendering, the following helpdesk support workflow is recommended:

1. Bidder should first contact the procurement focal point of the tender. The contact details of the focal point should be clearly specified in the solicitation document so that bidders are aware of who they need to contact for helpdesk support.
2. The Country Office consults internally with the eTendering focal point on the best course of action.
3. Refer to the available user guides and FAQs, including the [resources for bidders](#) for guidance on technical issues and questions on eTendering
4. For questions and issues with eTendering that cannot be resolved internally, submit the case details using the online eTendering Helpdesk case management system.



9.3 Frequently Asked Questions

1. *What is included in the FAQs section of this Guide?*

Normally, the information needed for all functions and steps in eTendering are covered in the main document. FAQs covers specific scenarios known where system reacts differently.

2. *What is the role of the eTendering focal point in my office??*

eTendering focal point will provide support to his/her colleagues related to eTendering. Queries related to eTendering should be consulted with the focal point before they are escalated to helpdesk support.

3. *I am conducting procurement on behalf of another country on regular basis (cluster or regional center e.g.) but do not have access to eTendering bid analysis page. What can I do?*

Contact PS support and PSU NY to request access to other BU. Approval must be obtained by relevant authority to grant this access, as below:

1. Access to specific BU(s), approval must be obtained by the manager of that BU.
2. Access to all BU within a region, approval must be obtained by the Management of the RB and/or RC office.
3. Access to all BU of UNDP, approval must be obtained by UNDP Procurement Director.

4. *My procurement team conducts procurement on behalf of other BUs on regular basis. How can I get event approval rights for these cases?*

Contact PS support and PSU to request event approval rights for other BU. The approval levels are same as for the bid analysis page, as explained in the question above.



9.3 Frequently Asked Questions

5. *How can I add collaborator role to a user?*

All ATLAS users are expected to have collaborator role added in their profile. If someone is missing that, contact PS support.

6. *I would like to create a specific template in the system for the use of my office only. How can I do that?*

At the moment, the moment system does not allow creation of templates by office, only global templates.

7. *What is the “Dispatch line items” link at line items level?*

This is a special feature that can be used in tenders with invited shortlisted bidders, to specify for which line items they are invited and not allow them to bid for certain lines. Before you use this, you must learn this feature and understand well how it works. Practice in ATLAS training site.

8. *I used the “Preview PDF” but did not receive any email from the system?*

There might be an issue with the system notification for this case. The issue is usually due to special characters in event ID or bid factor question. Follow these steps:

1. Make sure there are no special characters in event ID and bid factors.
2. If the issue persist, contact PS support.
3. If PS support cannot resolve the question, or no sufficient time to contact PS support, you can notify subscribed bidders via normal email. Remember, bidders can still see amendments and changes directly in the system, in the case of this issue, it is only the automatic email notifications that does not work.



9.3 Frequently Asked Questions

9. *Approver cannot approve, system shows an error message?*

Make sure that the deadline has not passed. System does not allow extending deadline of events after deadline of latest version has passed. If it is a pure error, contact PS support.

10. *I have extended the deadline of the event. Should I amend the original procurement notice in UNGM and UNDP website?*

If the extension is substantial, e.g. 1 week, then the new deadline need to be reflected in the procurement notice. Reason is to cover those suppliers that may see the original notice only close to or after original deadline has passed and do not participate because of that.

11. *A new version of the event has been created accidentally. We do not see the bid analysis button now. What should I do?*

You can cancel the version that was created accidentally, following the bid cancellation instructions. Cancel actions cancels always the last version of an event only. So if the last version (e.g. version 3) is in open status and version 2 is in “Posted” status, once it version 3 is cancelled, event will revert back to version 2.

If event has not closed yet and you expect to maybe create new version before deadline, do not cancel the version created accidentally, as you may use it. If you want to access the various versions, go to view event history page.

12. *I noticed that a bidder did not appear in the “View Bidding history” page but after deadline closed, it appeared that he had posted a bid. How is this explained?*

Normally all bidders who have accepted invitation and posted a bid will show in the page. However, if buyer removed a bidder from the invited bidders page when amending the event, then that bidder will not show. If you are in doubt, you can check for the bidders who have posted bids also from this query.



9.3 Frequently Asked Questions

13. How should I share the screen information with bidders for Public Bid Opening for LOTs?

It is up to the management of each office to agree on a method. You can organize a video conference or invite bidders physically to a conference room and project computer screen. You can also combine both, i.e. invite bidders physically for those who can come and also transmit through a video conference facility.

14. Files ZIP download feature is not working for a bid. What should I do?

You can request PS support to download files and share with you. You can also download the files individually [using these instructions](#).

15. System shows an error message when I try to download bidder files, also when trying to download individually. What should I do?

Contact PS support.

16. I tried to generate an export analysis report but did not receive an email?

If the email was not received, it could be an issue related to the PDF file generation feature. [See instructions how to prevent this in the future](#).



9.3 Frequently Asked Questions

17. Is it mandatory to generate the bid analysis export file?

No it is not. However, it can facilitate the process of tabulating all offers received, making it automatic and mitigate risks of inaccuracies if this process is done manually.

18. Can collaborator add or remove files and edit text in the evaluation summary box during evaluation process?

Yes, but system would save changes made only by one collaborator at a time. Collaborators cannot make changes simultaneously.

19. I cannot save changes made to the evaluation page. There is a system error about database inconsistency.

Another collaborator is trying to make changes at the same time. Make sure other collaborators are no longer editing the evaluation page, go back to event workbench and navigate to evaluation page again.

20. Vendor approver cannot see the custom field with the bidder ID?

A customization is in plan to make this field visible to vendor approvers as well.



9.3 Frequently Asked Questions

FAQs by Bidders

The following are a list of questions that are commonly asked by Bidders. Please review these to better understand how to provide helpdesk support to bidders who participate in events on eTendering.

- 1. Bidder is not sure whether they have a profile already in the system. Or they do not remember username and/or email associated with their account.***

Search for Bidder profiles [as per section 8.5 of the user guide](#). Provide bidders with username and email addressed information.

- 2. Bidder reports that they cannot complete registration. They get system messages that some fields are missing or other similar message.***

Request bidder to provide screenshots of all steps during registration. Check that all information is completed correctly and advise bidder accordingly. Most likely, some of the mandatory fields were not completed correctly.

- 3. Bidder reports that they cannot find a tender that has been launched in eTendering.***

1. Check the settings of the event to ensure that [preview and start date are correct](#).
2. Check that the event is [setup as public event](#) (if open competition).
3. In cases of limited competition, check that the [right bidder profile has been invited through the system](#).
4. If all above looks correct, advise bidder to check their filter settings. See section 2.1 of Bidders User Guide document.



9.3 Frequently Asked Questions

4. Bidder reports that they cannot see and/or download the tender documents.

1. Check the [event attachments](#) to ensure the button ‘Display to bidders’ is selected for the referred files.
2. Advise bidder to de-activate pop-up blocker.

5. Bidder Reports that the system does not accept their answers to the bid factors.

Check that the [bid factors are setup correctly](#).

6. Bidder reports that they submitted the bid but did not receive an email notifications from the system.

1. Check from “[View Bid History](#)’ to verify whether the bid is in posted status.
2. [Check Query](#) to verify status of bid.

7. Bidder reports that they do not see a specific event when they visit their “My Event Activity” page.

Check whether the referred event has been cancelled. If yes, that is the reason why it does not show. Bidder can still access this event by navigating to “View events and place bids” link, and modify the event end date filter to include past events. See Section 5.1 of Bidders User Guide Document.



9.3 Frequently Asked Questions

8. *Bidder reports that there have been changes in their personnel and the person who had access to the system will be leaving. They need to give access to a new personnel.*

Bidder can do so themselves by following these steps:

1. Log in the system with their profile and navigate to “My bidder Profile”
2. Change email address recorded with the account to the new one corresponding to the new personnel.
3. Log out of the system and close browser.
4. Use forgotten password function to reset the password. System will send a new temporary password to the new email address.
5. Change password. Now the account is linked with the new email address.

Detailed Instructions on Section 5.2 of Bidders User Guide.

If step 4 above does not work, contact PS support to reset the password from backend.

9. *Bidder reports that there have been changes in their personnel and the person who had access to the system has left already and the do not have access to the email address.*

Technically, UNDP user can modify the address of the company, see section 8.5. However, **before this is done, UNDP buyer must verify the identity of the person making this request by means of formal communications from the legal representative of the company.**

This action should be done only by a senior procurement officer. Generally, do this only for local suppliers. For International suppliers, contact helpdesk support/PSU for action.

10. *Bidder cannot log in. System says the username and password is not recognized.*

Advise bidder to use the forgotten password link as per section 6.4 of the Bidders User Guide document.

If that does not work, contact PS support and request to activate the bidder account.



