United Nations Development Programme



eTendering Supplier Training Guide

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Common Definitions:

Bid A submission of an offer on an event.

Bid Factor Bid requirements and evaluation criteria, that may or may not be cost-related, which

factors into the award of an event. Bid factors can be of pass or fail or can be

assigned weightings and used to determine the best qualified bid.

Examples of bid factors include price, product warranties, service level agreements,

and defect ratings.

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

sell event (i.e. when UNDP is selling goods) or a buy event (i.e. when UNDP is the

buyer).

Business Unit

An identification code that represents a high-level organization of business information usually representing an UNDP Country Office or HQ department.

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

> Auction: Also known as a reverse auction. All bids are visible to all bidders. Bidders can enter multiple bids, to beat the current highest-scoring bid.

Sealed RFx: Similar to a RFx event, yet also restricts the event creator from viewing the bids until after the event has ended. It is used by UNDP for Invitation to Bid (ITB) and request for Proposals (RFP) type of processes.

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

Event Creator The originator of the event in the system.

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

Preview Date

The time available before an event's start date. During preview, bidders may view the event, and may enter bid data into the system but will not be able to submit their bid.

Having a preview time for an event is optional.

Public **Event**

An event on which any person or organization may bid.

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

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

Auction: All bids and scores are visible to all bidders. Bidders can enter multiple bids, to beat the current highest-scoring bid.

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

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

structure and processing options.

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

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

Weighting Both bid factors and line items are weighted to reflect their level of importance.

Weighting is used to analyze and score bids.

Business Process

The eTendering module is designed to facilitate collaboration between buyers and suppliers of goods and services. Through the functionalities offered in the module, users (buyers) can manage bidding events, monitor participations, and evaluating offers, thus stream line the bidding process.

When creating an event, users have the option of inviting individual suppliers/vendors or making the event public. An invitation is automatically sent to all invitees once the event is posted. In order to participate in an event, suppliers must first register as a Bidder via the supplier portal and then enter bids for the events that they are invited to. Features such as bid factors, allows users to assign weightings and ideal answers for evaluation purposes.

Bidder Registration

Introduction:

ETendering enables users to provide suppliers with a simple registration process. For users that do not already exist in the database as bidders, the registration process collects pertinent information about them such as name, email, address, and organization information if they represent one.

For the first time registrants, use the following details to login and create access:

https://etendering.partneragencies.org

Username: event.guest Password: why2change

Please note:

- 1. <u>It is strongly recommended to create your username with two parts, your first name and last name separated by'.", similar to the one shown above.</u>
- 2. The registration page enables Bidders to create a user ID. System will generate a temporary password that will be sent to the bidder to the email address provided by Bidder during registration process. Bidders will be prompted to create their own password. Afther this process, bidders see and bid on both public events and events to which they have been invited.

Navigation: Manage Events and Place Bids > Register Bidder

1.) Enter bidder information: As soon as bidder logs in for the first time with the username and password above, bidders must register themselves following the steps below:



Bidder Registration

Step 1 of 6: Preliminary information.

These questions will determine the type of bidder you will become.

- * Required Field
- 1. Please select the type of bidder which best describes you.
- Business
- Individual
- 2. What type of bidding activities are you interested in?
- Buying goods/Services
- Selling goods/Services
- Both

Next >>

Cancel Registration

* Required Field

Bidder Registration

* Required Field

Step 2 of 6: User Account Setup

Create a user account for your company. Optionally, if you want to add another user to access this account please click on the 'Save and Add Another user' button. You can repeat it to add as many users as needed.

*Company Name | Training Expert Inc

URL: http://

User Information

*First Name | Training | Delete

*Last Name | Expert |

Title |

*Email ID | madhu.vegunta@undp.org |

*Telephone | 2129065191 | Ext |

Fax |

*User ID | training.expert | (User's account login name.)

Save and Add Another User

Cancel Registration

* Required Field

Next >>

<< Back

You can add several users under the same Bidder profile. Each added user will have their own User ID and password.

Bidder Registration



USA is selected by default. Please make sure to correct accordingly.

Bidder Registration

Step 4 of 6: Other Account Addresses

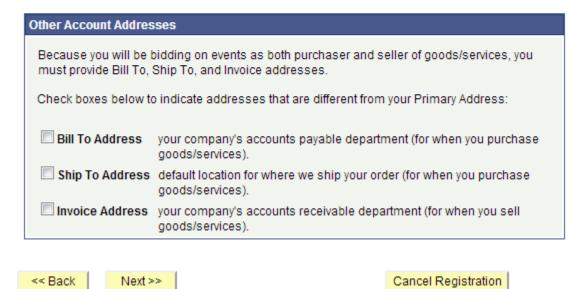
* Required Field

The Primary Address you have entered for Training Expert Inc is:

1 Main Street

New York, New York 10017, United States

If you need to make corrections, click the Back button and edit your fields.



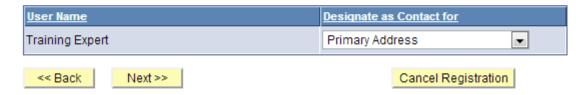
^{*} Required Field

Bidder Registration

Step 5 of 6: Address Contacts

Please enter additional addresses as necessary. (This is required only if your Primary Address is not used for all address types.) Next, please designate each of your registered users to an appropriate address category. If you're not sure which address category is the best match, choose "Primary Address".

* Required Field



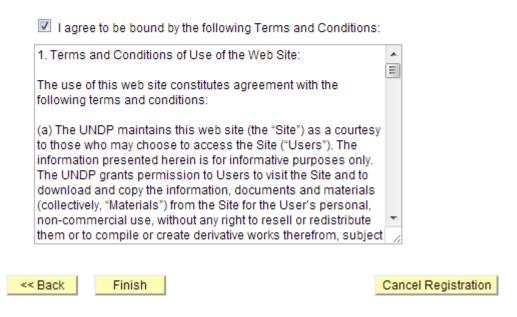
^{*} Required Field

Bidder Registration

Step 6 of 6: Terms and Conditions

Make sure you read the terms and conditions fully before continuing.

* Required Field



* Required Field

Bidder Registration

Bidder registration for Training Expert Inc was successful.

You will receive a confirmation email with your username and password. Please note there may be delay in granting the necessary access to you. Therefore, please close this browser completely and wait for 15 minutes and use the url provided in the email

ΟK

Please close the browser after this step and the system will send an automatic email to the registered address with a new password. Please wait for about 30 minutes to allow the system to update your profile to ensure proper access is granted and please use that password to log into the system to view and bid on open events.

Clear the history of your browers before logging in with the temporary password received via email.

Searching, Viewing and Submitting Bids in the System

Introduction:

When you are invited from UNDP directly to participate in a Bid Event you will receive an email notifications informing about the bid event and containing all Bid event attachments and direct link to the bid event in the system. You can also search for public event published in the system. All bid events in the system are also published also in the UNDP website.

Searching for a bid Event in the system

Click on "Manage Events and Place Bids"



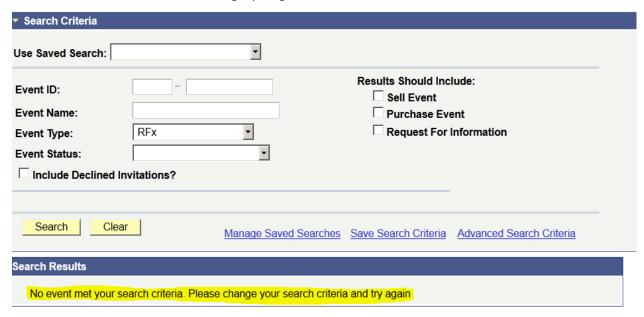
Menu will expand. Click again on "Manage Events and Place Bids"



Search for the bid event you are interested. Several search fields are available. You have to select a filter, otherwise there will no search results shown:

/iew Events and Place Bids

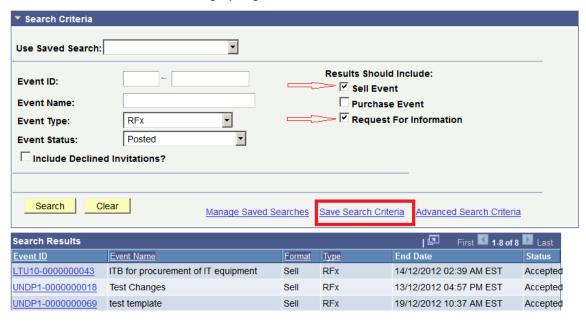
Enter search criteria to locate an event for viewing or placing bids.



You can filter by type of event "Results should include:" on the right or by specific bid event information on the left. You can also save search criteria for repeated use in the future.

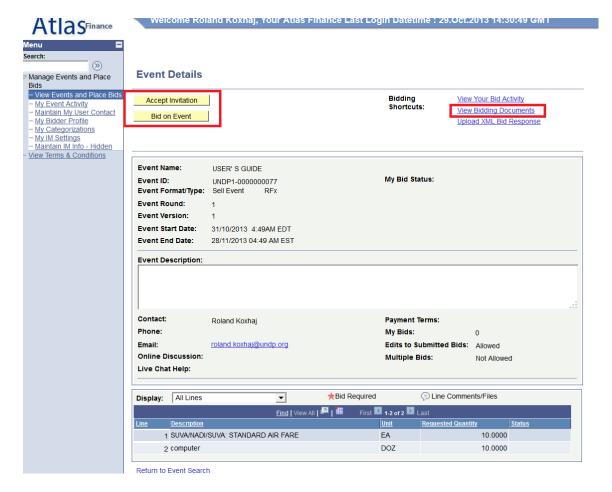
View Events and Place Bids

Enter search criteria to locate an event for viewing or placing bids.



Viewing Bid Events and Submitting Bids

When you have found and selected the bid event you are looking for, the following screen will appear, showing basic information from the bid Event:



In order to view the documents attached to this bid, you must click on "View Bidding Documents" on the top right". It will prompt a screen with links to documents that can be downloaded.

If interested to participate in the event, click on "Accept Invitation". <u>Important note</u>: If you have not accepted the invitation, you will not be notified via email on changes or clarifications that may be made to the bid event during the bidding period. Accepting an invitation does not bind bidders to submit a bid eventually.

Bidders who are invited directly in the system will see also a button "Decline Invitation". If you are not interested in participating in this bid event, click on "Decline Invitation". You are kindly requested to provide a reason for not accepting to participate in the bid event.

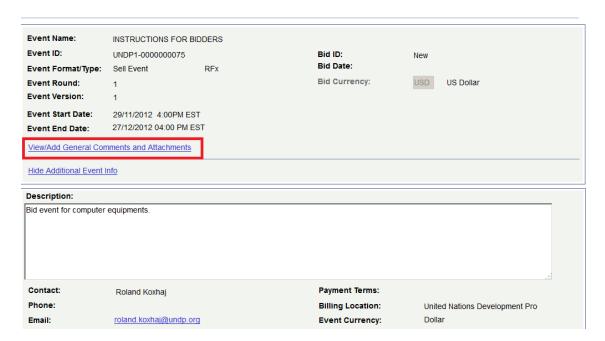
Click on "bid on Event" when you are ready to submit your bid.

Submitting a bid

The first section of the bid event provided general information and coonditions of the bid event. This section cannot be modified by the bidder. You download also from here

documents attached to the Bid Event by UNDP or upload your documents that are part of your bid, by clicking on "View/Add General Comments and Attachments".

Note: The file names cannot be more than 60 characters.

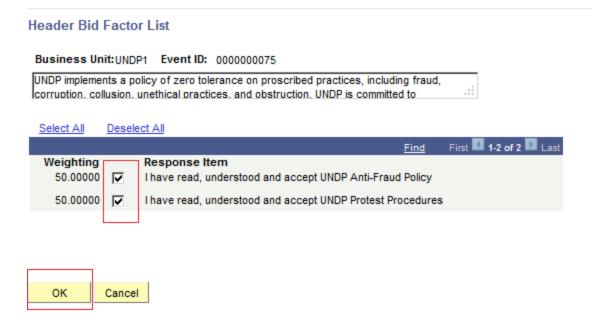


The first step in submitting a bid is to respond to the general requirements of the bid Event. Responses can be entered in different ways, depending on the type of the bid Factor. Bidders must respond to all questions marked as "Bid Required". In addition, some of the questions may be marked as "Ideal Response Required". Bidders must provide the response required in order to be able to submit their bid.

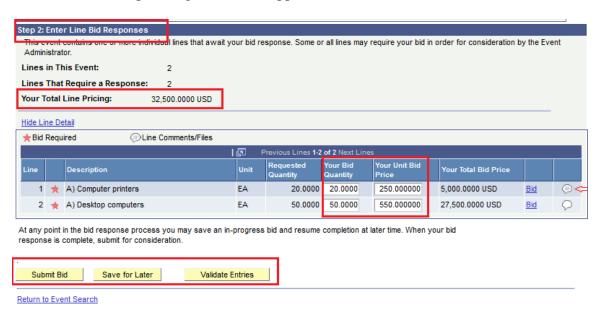
Bidder can upload documents that are specific to a certain question, e.g. the QA Certificates under the bid question related to QA certificates.



The responses for some of the questions can be entered by selected from the drop down tool, some can be free text or numbers, and some require the bidder to select from different options, e.g.



The second step is to submit the prices for all lines required and specific information related to each line. Bidders here can input the quantity that they are required to quote on and the unit price. The sytem will calculate the total per each line and the total of all lines. To make specific comments per each line or to upload documents that are specific to that line, e.g. the technical specification, you must click on the buble icon on the right of each line and a uploading screen will appear.

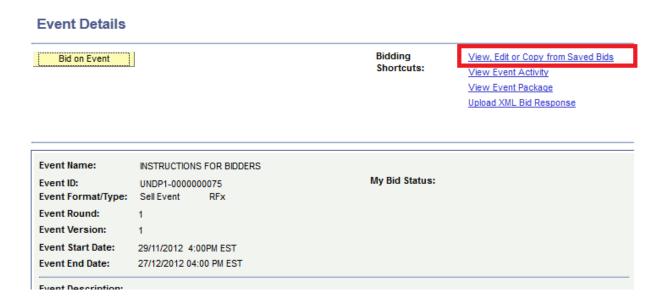


Once you have submitted all the information required, you can either save your bid for later submission or submit it right away. Important note: If you "Save for Later" your bid is not submitted. A Bid is submitted only one you click on "Submit bid" in which case a confirmation email is received with a copy of the bid submitted.

You can click on "Validate entries" to check if the responses provided meet the minimum responses required in the bid event and confirm if the bid is ready to be submitted.

Viewing, Editing, and Canceling submitted Bids

Open you bid by going to "View Events and Place bids" and selecting the corresponding Bid Event. Click on "View, Edit or Copy from Saved Bids"



Normally UNDP does not accept alternative bids. Bidders can submit only one bid. However, Bidders can edit their bid at any time before the deadline. To edit your bid, click on "View/Edit".

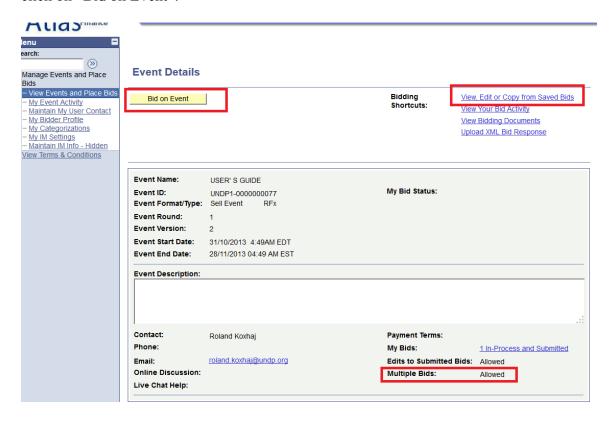


This will open the bid submitted and you can overwrite to make the necessary changes and submit again.

However, in specific processes, UNDP may accept or even require alternate bids. In such cases, UNDP will allow Bidders to submit more then one bid, with one of them being the primary bid and the other/s being alternate bids. There are different methods of how to submit an alternate bid as described below:

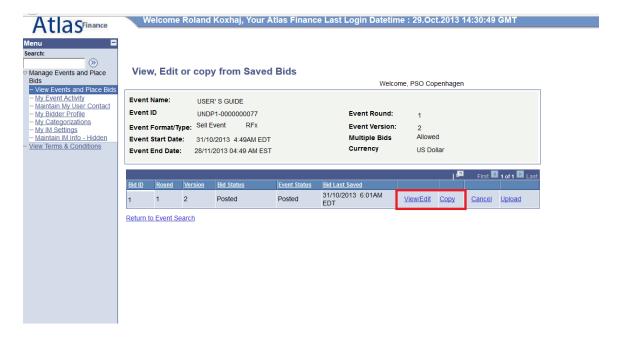
Method 1: Submit an alternate bid directly.

In this method you will submit a bid directly entering all the required information scuh as: responses to bid questions; prices, attachments, etc from scratch. To do so, simply click on "Bid on Event".



Method 2: Copy from previous bid.

You can use this method if you want to use the information submitted in your previous/original submitted bid and then make only necessary changes. To do so, click on "View, Edit, or Copy from Saved bids" and then click on the link "copy". System will prompt the bid already completed with same information as the original bid and Bidder can then make necessary changes.

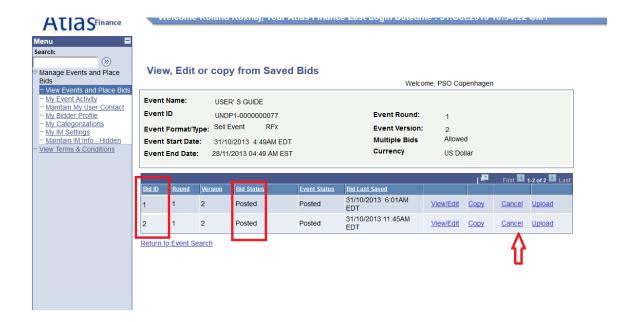


Important note: Make sure that the bid you are trying to copy from corresponds to the latest version of the Bid event, otherwise you will receive a system error and will not be able to use that bid.

In cases when alternate bids are allowed, bidders must clearly identify which is the alternate bid and also cancel any bid that is not valid. How to cancel a bid is explained further below.

To cancel a bid go to "View, Edit or Copy from saved bids" and click on "Cancel" on the bid that you wish to cancel. Pay attention to the Bid Status columns. If only one bid is required, then there must be only one bid with status as "Posted".

View before bid is cancelled. Look at column BidID on the left and status shown as "Posted" for both bids. This means that you have submitted 2 bids in the system.



If you want to cancel one of them, click on "cancel" beside the bid you want to cancel. Status will change to "Cancelled" as shown below:



Amending your bid when bid event is amended

If UNDP amends the bid event and its requirements, an automatic email notification will be sent by the system to all bidders who have either accepted bid invitation, have been invited directly by UNDP, or who have already submited a bid on the original version of the Bid Event. The amendments may consist of various aspects and how the bidder can

modify his bid accordingly depends on what changes have been made in the bid event. In any case, there are two main categories of changes:

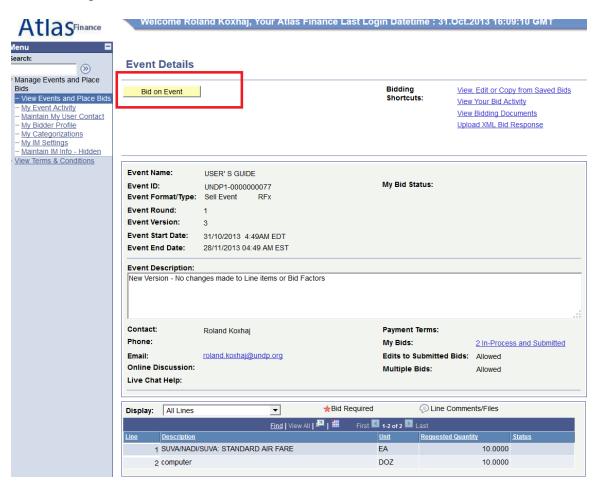
- a) Changes include also changes in line items or bid factors.
- b) No changes made to line items or bid factors.

If no changes have been made to the bid factors or line items, bidder can follow the same steps for editing his bid by clicking on "View/Edit" link and overwriting the information.

Bidder can also submit a new bid, in the same way as if when submitting an alternate bid and cancelling the previous bid, as explained above.

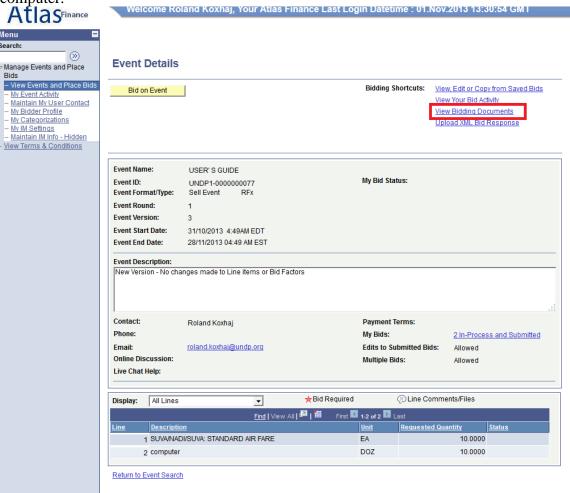
If the ammendment of the bid event include changes in bid factors or line item, bidder cannot edit previous bid or copy it and create a new bid. If bidder click on the "View/Edit" or "Copy" links corresponding to the previous bid for the original version of the bid event, a system error will appear.

To submit a revised bid for the new version with changes in bid factors or line items, bidders must submit a new bid by clicking on "Submit bid" link in the main page and cancel their previous bid.

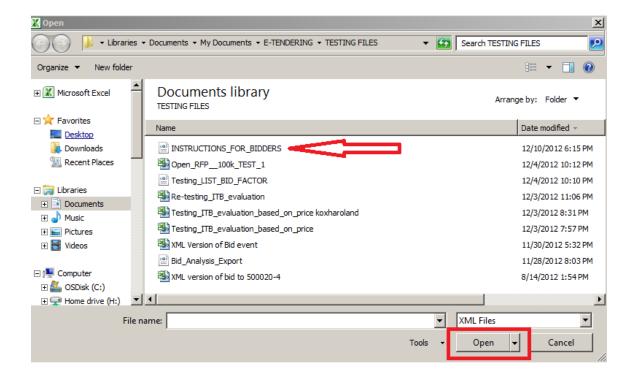


Submitting bids via xml files

You can prepare your response off-line outside the system and then upload it in the system when ready, using xml files. To do this first you need to download the XML version of the bid event by going to "View Event Package" and then downloading Event bid Package in XML format. Once the page is downloaded, you must save it in your computer.



Then open Excel and open the save XML file from there. Note that you must open the XML file by "Open File" menu in Excel and not by clicking on the XML file itself in the folder.



You can provide your responses in the excel table. Once responses have been provided you can save the files as an XML excel file and upload your responses in the system. Worksheet "General Details" is used to respond to the general bid factors and the worksheet "Line details" is used for completing the responses for each line item.

To upload the XML file into the system go to the start page of the Bid event and click on "Upload XML Bid Response".

NOTE: Documents cannot be attached through XML files. They must be uploaded in the system directly.