




eTendering Supplier Training Guide

TABLE OF CONTENTS:

eTendering Supplier Training Guide	0
Common Definitions:.....	2
Business Process	3
Bidder Registration	4
Searching, Viewing and Submitting Bids in the System	9
Searching for a bid Event in the system.....	9
Viewing Bid Events and Submitting Bids	11
Submitting a bid.....	13
Viewing, Editing, and Canceling submitted Bids.....	16
Submitting bids via xml files	17



Common Definitions:

Bid	A submission of an offer on an event.
Bid Factor	<p>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.</p> <p>Examples of bid factors include price, product warranties, service level agreements, and defect ratings.</p>
Bidder	Anyone registered to place a bid on an event. The term <i>bidder</i> applies whether it is a sell event (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	<p>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:</p> <p><i>Auction</i>: 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.</p> <p><i>RFx</i>: Also known as a request for quotation. Each bidder submits one bid by the specified End Date, at which time the bids are evaluated and the event is awarded. Bidders never see others' bids but the event creator can see all bids throughout the event.</p> <p><i>Sealed RFx</i>: 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.</p>
Competitive Bid	An event in which bidders can view each others' scores and bid as often as they want to submit the winning score.
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.
Extension Period	The length of time an auction event is extended. Events can be extended if a bidder posts a bid at the last minute. Extensions are used to keep bidding fair by allowing bidders time to respond to the last minute bid.
Factor Type	The type of information being requested on the bid factor, such as monetary, numeric, date, text, yes/no, or list.
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.
Reserve Price	<p>The monetary amount that the event creator is willing to accept. When the event reaches Award status, the system warns the event creator if the highest scoring bid does not meet the reserve price. The user can still choose to award the event.</p> <p>For a sell event, the reserve price is the minimum acceptable; for a buy event, it is the maximum acceptable.</p>

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 <i>auction</i> . In a sell event, the event creator offers a good or service for sale. In addition to price, the creator may specify other bid factors which helps determine the award decision. Bidders must submit their bids, including responses to the bid factors, by a specified end date at which time the bids are evaluated and the winners are declared. In PeopleSoft Strategic Sourcing, there are two types of sell events: <i>Auction</i> : All bids and scores are visible to all bidders. Bidders can enter multiple bids, to beat the current highest-scoring bid. <i>RFx</i> : 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://finance.partneragencies.org/psp/UNDPP1FS/SUPPLIER/ERP/h/?tab=DEFAULT>

Username: event.guest

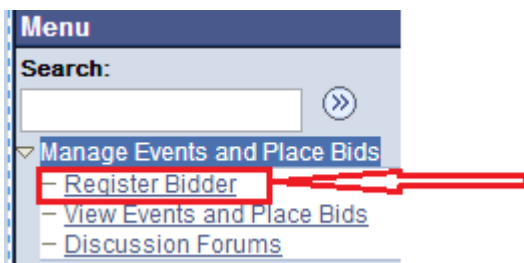
Password: why2change

Please note:

- 1. It is strongly recommended to create your username with two parts, your first name and last name separated by '.', similar to the one shown above.*
- 2. Although the registration page enables them to create a user ID and password, the actual user name and password will be created and assigned by the Atlas security team will send a valid password to the registered email address. Once the supplier has been assigned a valid user name and password, they can see and bid on both public events and events to which you have invited him or her.*

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


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.

* Required Field

*Company Name
URL: <http://>

User Information

*First Name  [Delete](#)
*Last Name
Title
*Email ID
*Telephone Ext
Fax
*User ID (User's account login name.)

Save and Add Another User

<< Back

Next >>

Cancel Registration

* Required Field

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

Bidder Registration

Step 3 of 6: Primary Address

Please provide a Primary Address for your company. If your company has multiple site locations, the Primary Address would be the main headquarters.

* Required Field

Primary Address

If your address is not located in the USA, Please click on the 'Change Country' link and select the country before you enter the address.

Country: United States [Change Country](#)

*Address 1:

Address 2:

Address 3:

*City:

County:

*State:

Postal:

<< Back

Next >>

Cancel Registration

* Required Field

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.

Other Account Addresses	
Because you will be bidding on events as both purchaser and seller of goods/services, you must provide Bill To, Ship To, and Invoice addresses.	
Check boxes below to indicate addresses that are different from your Primary Address:	
<input type="checkbox"/> Bill To Address	your company's accounts payable department (for when you purchase goods/services).
<input type="checkbox"/> Ship To Address	default location for where we ship your order (for when you purchase goods/services).
<input type="checkbox"/> Invoice Address	your company's accounts receivable department (for when you sell goods/services).

<< Back

Next >>

Cancel Registration

* 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

User Name	Designate as Contact for
Training Expert	Primary Address <input type="button" value="v"/>

<< Back

Next >>

Cancel Registration

* Required Field

Bidder Registration

Step 6 of 6: Terms and Conditions

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

* Required Field

I agree to be bound by the following Terms and Conditions:

1. Terms and Conditions of Use of the Web Site:

The use of this web site constitutes agreement with the following terms and conditions:

(a) The UNDP maintains this web site (the "Site") as a courtesy to those who may choose to access the Site ("Users"). The information presented herein is for informative purposes only. The UNDP grants permission to Users to visit the Site and to download and copy the information, documents and materials (collectively, "Materials") from the Site for the User's personal, non-commercial use, without any right to resell or redistribute them or to compile or create derivative works therefrom, subject

<< Back

Finish

Cancel Registration

* 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

OK

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.

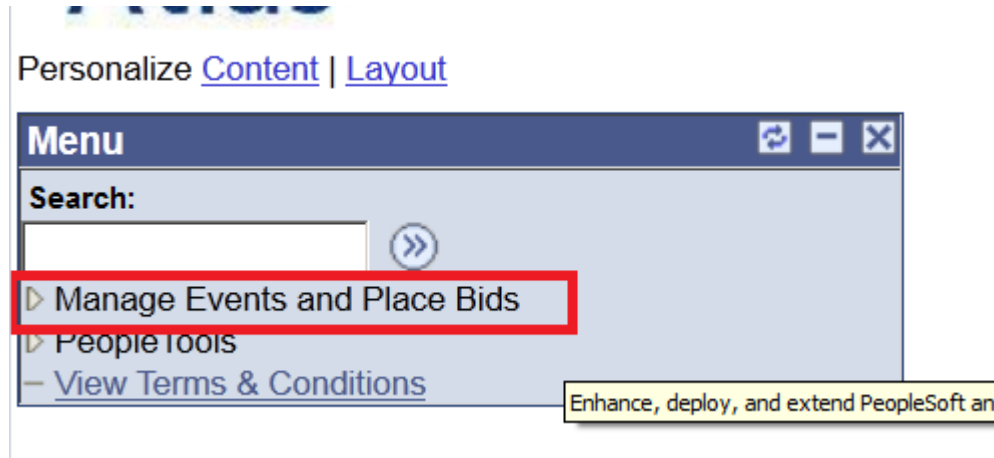
Searching, Viewing and Submitting Bids in the System

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 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:

/view 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.

Search Criteria

Use Saved Search:

Event ID: -

Event Name:

Event Type:

Event Status:

Include Declined Invitations?

Results Should Include:

- Sell Event
- Purchase Event
- Request For Information

[Manage Saved Searches](#) [Save Search Criteria](#) [Advanced Search Criteria](#)

Search Results | First 1-8 of 8 Last

Event ID	Event Name	Format	Type	End Date	Status
LTU10-0000000043	ITB for procurement of IT equipment	Sell	RFX	14/12/2012 02:39 AM EST	Accepted
UNDP1-0000000018	Test Changes	Sell	RFX	13/12/2012 04:57 PM EST	Accepted
UNDP1-0000000069	test template	Sell	RFX	19/12/2012 10:37 AM EST	Accepted

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:

Event Details

Accept Invitation

Decline Invitation

Bid on Event

Bidding Shortcuts: [View Event Activity](#)
[View Event Package](#)
[Upload XML Bid Response](#)

Event Name: INSTRUCTIONS FOR BIDDERS
Event ID: UNDP1-0000000075
Event Format/Type: Sell Event RFX
Event Round: 1
Event Version: 1
Event Start Date: 29/11/2012 4:00PM EST
Event End Date: 27/12/2012 04:00 PM EST

My Bid Status:

Event Description:
Bid event for computer equipments.

Contact: Roland Koxhaj
Phone:
Email: roland.koxhaj@undp.org
Online Discussion:
Live Chat Help:

Payment Terms:
My Bids: 0
Edits to Submitted Bids: Not Allowed
Multiple Bids: Allowed

Display: All Lines ★ Bid Required Line Comments/Files

Find | View All | First 1-2 of 2 Last

Line		Description	Unit	Requested Quantity	Status
1	★	A) Computer printers	EA	20.0000	
2	★	A) Desktop computers	EA	50.0000	

[Return to Event Search](#)

In order to view the documents attached to this bid, you must click on “View Event Package 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”. Important note: 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.

If you are not interested in participating in this bid event, click on “decline Invitation”. You must 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 conditions 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.

Event Name:	INSTRUCTIONS FOR BIDDERS		
Event ID:	UNDP1-0000000075	Bid ID:	New
Event Format/Type:	Sell Event RFX	Bid Date:	
Event Round:	1	Bid Currency:	<input type="radio"/> USD <input type="radio"/> US Dollar
Event Version:	1		
Event Start Date:	29/11/2012 4:00PM EST		
Event End Date:	27/12/2012 04:00 PM EST		
	View/Add General Comments and Attachments		
	Hide Additional Event Info		
Description:			
Bid event for computer equipments.			
Contact:	Roland Koxhaj	Payment Terms:	
Phone:		Billing Location:	United Nations Development Pro
Email:	roland.koxhaj@undp.org	Event Currency:	Dollar

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.

Step 1: Answer General Event Questions

The event administrator requests your response to questions not specific to any specific item.

General Event Questions	4
Required Questions	4

[Hide Event Questions](#)

Event Questions

★ Bid Required ★ Ideal Response Required

Previous Questions 1-4 of 4 Next Questions

★ Have you provided Quality Certificate (e.g., ISO, etc.) and/or other similar certificates, accreditations, awards and citations received by the Bidder, if any.

Response:

Ideal: Yes

Weighting
[Add Comments or Attachments](#)

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

Response:

[Add Comments or Attachments](#)

★ Please provide FCA Delivery time, of this product, from the PO date.

Response:

Best: 5
Worst: 8
UOM: Week

Weighting
[Add Comments or Attachments](#)

★ 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 addressing all acts of fraud and corrupt practices against UNDP as well as third parties involved in UNDP activities. (See http://www.undp.org/about/transparencydocs/UNDP_Anti_Fraud_Policy_English_FINAL_june_2011.pdf and http://www.undp.org/content/undp/en/home/operations/procurement/procurement_protest/ for full description of the policies)

Response:

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

[Select Response](#) **Weighting**
[Add Comments or Attachments](#)

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.

Header Bid Factor List

Business Unit:UNDP1 Event ID: 0000000075

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

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

Weighting		Response Item
50.00000	<input checked="" type="checkbox"/>	I have read, understood and accept UNDP Anti-Fraud Policy
50.00000	<input checked="" type="checkbox"/>	I have read, understood and accept UNDP Protest Procedures

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 system 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 bubble icon on the right of each line and a uploading screen will appear.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 2
 Lines That Require a Response: 2

Your Total Line Pricing: 32,500.0000 USD

[Hide Line Detail](#)

★ Bid Required Line Comments/Files

Line	Description	Unit	Requested Quantity	Your Bid Quantity	Your Unit Bid Price	Your Total Bid Price		
1	★ A) Computer printers	EA	20.0000	20.0000	250.000000	5,000.0000 USD	Bid	
2	★ A) Desktop computers	EA	50.0000	50.0000	550.000000	27,500.0000 USD	Bid	

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Return to Event Search](#)

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”

Event Details

Bid on Event	Bidding Shortcuts:	View, Edit or Copy from Saved Bids View Event Activity View Event Package Upload XML Bid Response
Event Name:	INSTRUCTIONS FOR BIDDERS	
Event ID:	UNDP1-0000000075	My Bid Status:
Event Format/Type:	Sell Event RFX	
Event Round:	1	
Event Version:	1	
Event Start Date:	29/11/2012 4:00PM EST	
Event End Date:	27/12/2012 04:00 PM EST	
Event Description:		

In the subsequent screen you can click on “view” to view the bid, or “copy” to make a copy of the bid.

To edit a bid, click on “copy”. This way, you can use your original bid as a base and make necessary changes. Once you have made the necessary changes to you bid, click on “submit bid” to submit your new bid.

IMPORTANT NOTE: when you make a new bid, you must cancel the previous bid. UNDP does not accept multiple bids unless it is an alternative bid and it is explicitly allowed by UNDP to submit alternative bid.

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 msut be only one bid with status as “Posted”.

View, Edit or copy from Saved Bids

Welcome, ROLANDPSO

Event Name:	INSTRUCTIONS FOR BIDDERS		
Event ID	UNDP1-0000000075	Event Round:	1
Event Format/Type:	Sell Event RFX	Event Version:	1
Event Start Date:	29/11/2012 4:00PM EST	Multiple Bids	Allowed
Event End Date:	27/12/2012 04:00 PM EST	Currency	US Dollar

Bid ID	Round	Version	Bid Status	Event Status	Bid Last Saved			
4	1	1	Cancelled	Posted	30/11/2012 9:41AM EST	View	Copy	
7	1	1	Cancelled	Posted	10/12/2012 12:11PM EST	View	Copy	
6	1	1	Disq.	Posted	30/11/2012 3:24PM EST	View	Copy	
2	1	1	Disq.	Posted	30/11/2012 9:16AM EST	View	Copy	
1	1	1	Disq.	Posted	29/11/2012 5:29PM EST	View	Copy	
3	1	1	Disq.	Posted	30/11/2012 9:21AM EST	View	Copy	
5	1	1	Posted	Posted	30/11/2012 9:36AM EST	View	Copy	Cancel

[Return to Event Search](#)

In some event, e.g. when alternative bids are not required, the event may be set up to not allow Bidders to submit a new bid. To edit your bid, you must simply edit the responses in your already submitted 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.

Event Details

Bid on Event

Bidding Shortcuts: [View, Edit or Copy from Saved Bids](#)
[View Event Activity](#)
[View Event Package](#)
[Upload XML Bid Response](#)

Event Name: INSTRUCTIONS FOR BIDDERS
Event ID: UNDP1-0000000075
Event Format/Type: Sell Event RFX
Event Round: 1
Event Version: 1
Event Start Date: 29/11/2012 4:00PM EST
Event End Date: 27/12/2012 04:00 PM EST

My Bid Status:

Event Description:
Bid event for computer equipments.

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.

The screenshot shows a Windows Explorer window titled 'Open' with the address bar set to 'Libraries > Documents > My Documents > E-TENDERING > TESTING FILES'. The main pane displays a list of files in the 'Documents library' under the 'TESTING FILES' folder. The file 'INSTRUCTIONS_FOR_BIDDERS' is highlighted with a red arrow. The 'Open' button in the bottom right corner is highlighted with a red box.

Name	Date modified
INSTRUCTIONS_FOR_BIDDERS	12/10/2012 6:15 PM
Open_RFP__100k_TEST_1	12/4/2012 10:12 PM
Testing_LIST_BID_FACTOR	12/4/2012 10:10 PM
Re-testing_ITB_evaluation	12/3/2012 11:06 PM
Testing_ITB_evaluation_based_on_price_koxharoland	12/3/2012 8:31 PM
Testing_ITB_evaluation_based_on_price	12/3/2012 7:57 PM
XML Version of Bid event	11/30/2012 5:32 PM
Bid_Analysis_Export	11/28/2012 8:03 PM
XML version of bid to 500020-4	8/14/2012 1:54 PM

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.