




eTendering Supplier Training Guide

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Common Definitions:

Bid	A submission of an offer on an event.
Bid Factor	<p>An element of an event, that may or may not be cost-related, which factors into the award of an event. Bid factors can be assigned weightings and used to determine the best bid.</p> <p>Examples of bid factors include price, product warranties, service level agreements, and defect ratings.</p>
Bidder	Anyone registered to place a bid on an event. The term <i>bidder</i> applies whether it is a sell event or a buy event.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Buy Event	<p>In a buy event, the event creator wants to buy goods or services. In addition to price, the creator may specify other bid factors and assign weightings, which factors into the award decision. Bidders must submit their bids, including responses to the bid factors, by a specified End Date at which time the bids are evaluated and the event is awarded. In PeopleSoft Strategic Sourcing, there are three types of buy events:</p> <p><i>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 quote. 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.</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.
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, list, or separator.
Preview Date	The time available before an event's start date. During preview, bidders may view the event, and may enter bid data into the system but not post it. Having a preview time for an event is optional.
Public Event	An event on which any person or organization may bid.
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	<p>Most familiarly known as an <i>auction</i>. In a sell event, the event creator offers a good or service for sale. In addition to price, the creator may specify other bid factors which helps determine the award decision. Bidders must submit their bids, including responses to the bid factors, by a specified end date at which time the bids are evaluated and the winners are declared. In PeopleSoft Strategic Sourcing, there are two types of sell events:</p> <p><i>Auction</i>: All bids and scores are visible to all bidders. Bidders can enter multiple bids, to beat the current highest-scoring bid.</p> <p><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.</p>
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 addresses the business process gap in Atlas between the Requisition and Purchase Order. This 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. The system provides the ability to create a PO or Contract upon the award of the event. In addition, it will also create a Vendor Profile if one doesn't exist for the winning bidder.

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, 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: ETendering > ETendering Home Page > Bid Registration

1.) Enter bidder information

Note:

The ETendering enables you to provide bidders with a simple registration process. For users that do not already exist in the database, the registration process collects pertinent information about them such as name, email, address, and organization information if they represent one. Registering enables them to create a user ID and password, and assigns them the role of Event Bidder. Now, the user is valid in the system and can see and bid on both public events and events to which you have invited him or her.

Register Bidder - Windows Internet Explorer

https://finance-test.p...

File Edit View Favorites Tools Help

MyPoints SEARCH

Home Worklist Add to Favorites Sign out

Atlas Finance

Help

Bidder Registration

Step 1 of 8: 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

Internet 100%

Bidder Registration

Step 2 of 8: User Account Setup


Begin creating your user account here. Note that you may register other users for your company in addition to yourself. To create additional accounts for other users, click "Save and Add Another User" to expand the form. You may also provide instant messaging account information (for real-time communication with others using the system), as well as preferred time zone and currency.

* 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.)

Other Contact Info (Optional)

Instant Messaging (IM) Information

IM Service

IM User Name

Personalization Information

Language

Time Zone

Currency Code

Save and Add Another User

<< Back

Next >>

Cancel Registration

* Required Field

The screenshot shows a web browser window titled "Register Bidder - Windows Internet Explorer". The address bar shows "https://fi..." and the search bar shows "Yahoo! Search". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar includes buttons for Back, Forward, Stop, Reload, Home, Print, and a Search button. The Favorites bar shows "MyPoints" and "R...". The main content area displays the "Atlas Finance" logo and navigation links: Home, Worklist, Add to Favorites, and Sign out. The page title is "Bidder Registration" and the sub-header is "Step 3 of 8: Primary Address". Below this, a message states: "Please provide a Primary Address for your company. If your company has multiple site locations, the Primary Address would be the main headquarters." A section titled "* Required Field" contains the "Primary Address" form. The form includes a "Country" dropdown set to "United States" with a "Change Country" link. Below this are three address fields: "*Address 1:" (containing "304 E. 45TH STREET"), "Address 2:", and "Address 3:". There are also fields for "*City:" (containing "NEW YORK"), "County:", "*State:" (containing "NY" with a search icon), and "Postal:" (containing "10017"). At the bottom of the form are three buttons: "<< Back", "Next >>", and "Cancel Registration". A legend at the bottom left indicates "* Required Field". The browser's status bar at the bottom shows "Internet" and "100%".

Register Bidder - Windows Internet Explorer

https://fi... Yahoo! Search

File Edit View Favorites Tools Help

MyPoints SEARCH

Favorites R... Peop...

Atlas Finance Home Worklist Add to Favorites Sign out

Bidder Registration

Step 3 of 8: 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

Country: United States [Change Country](#)

*Address 1: 304 E. 45TH STREET

Address 2:

Address 3:

*City: NEW YORK

County:

*State: NY Postal: 10017

<< Back Next >> Cancel Registration

* Required Field

Register Bidder - Windows Internet Explorer

https://finance-test.partneragenc...

MyPoints SEARCH

AtlasFinance Home Worklist Add to Favorites Sign out Help

Bidder Registration

Step 4 of 8: Other Account Addresses

*** Required Field**

The Primary Address you have entered for is:
304 E. 45TH 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:

☐ **Bill To Address** your company's accounts payable department (for when you purchase goods/services).

☐ **Ship To Address** default location for where we ship your order (for when you purchase goods/services).

☐ **Invoice Address** your company's accounts receivable department (for when you sell goods/services).

<< Back Next >> Cancel Registration

Done Internet 100%

Register Bidder - Windows Internet Explorer

https://finance-test.partner...

MyPoints SEARCH

AtlasFinance Home Worklist Add to Favorites Sign out Help

Bidder Registration

Step 5 of 8: 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
SELL MANY	Primary Address

<< Back Next >> Cancel Registration

*** Required Field**

Done Internet 100%

Bidder Registration

Step 6 of 8: Additional Classification Information

Please fill out the following information. This information allows us to more accurately tailor the Sourcing process with your business.

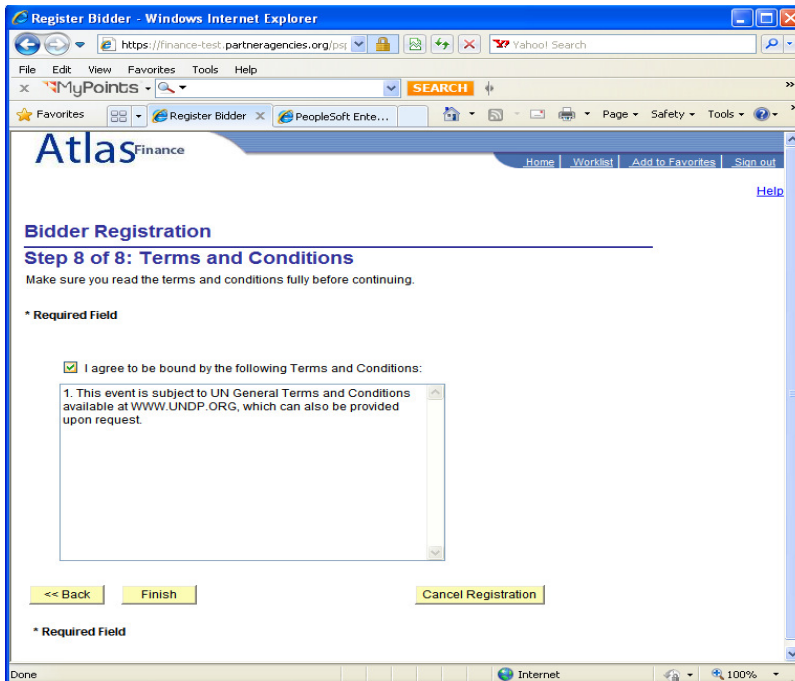
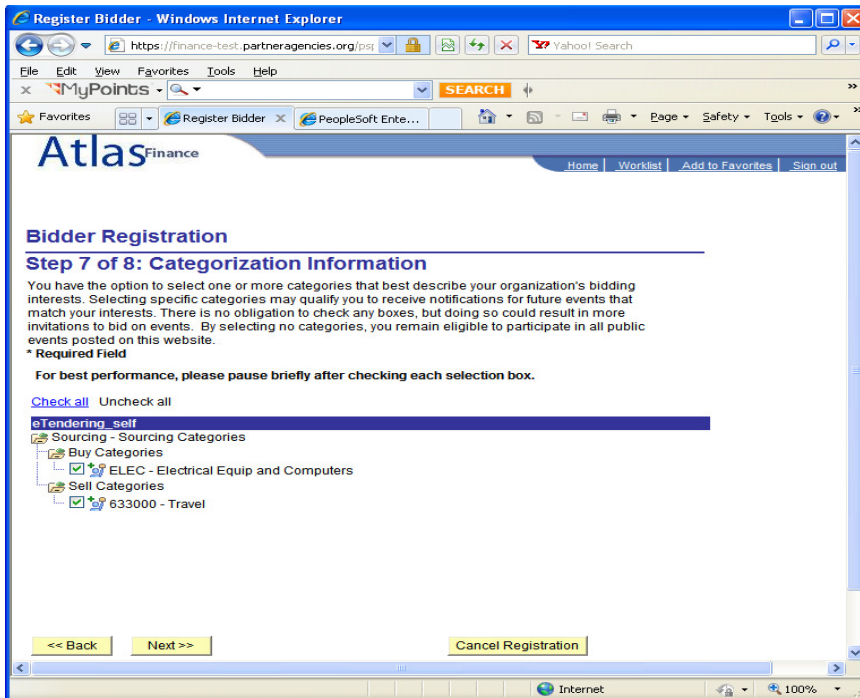
* Required Field

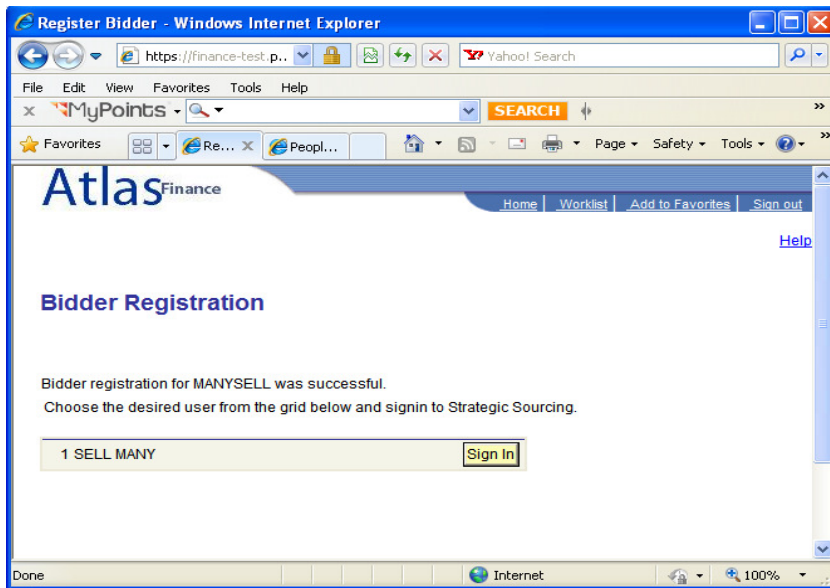
VAT Information				
	Country	Description	VAT ID	Home Country
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
				<input type="button" value="Delete"/>
<input type="button" value="Add Row"/>				

More About Your Organization (Optional)	
HUBZone Program: <input type="text"/>	Sm Disadvantaged Business Prog: <input type="text"/>
Size of Small Business: <input type="text"/>	Other Preference Programs: <input type="text"/>
Veteran-Owned Small Business: <input type="text"/>	
<input type="checkbox"/> Women-Owned Business	
<input type="checkbox"/> Emerging Small Business	

* Required Field

Please note the following step is not Mandatory





After this step the user will get an email with a new password. The user needs to use that password to log into the system to view and bid on open events.

Once an event is awarded to a registered bidder, the ETendering updates their userID to the correct type: vendor or customer. You would search under vendor or customer to invite this bidder to future events.

Entering Responses

Introduction:

Through the “Create Bidder Response” page users can enter bid response on behalf of bidder who does not have the capacity or means to enter bids online.

Navigation:

ETendering > Event Responses > Create Bidder Response

- 1.) Enter values (ex. Event ID) in search criteria and click on the search button
- 2.) Select the event ID to enter response for the corresponding bidder


Create Bidder Response

Search Criteria							
*Business Unit: <input type="text" value="UNDP1"/>	Bidder Setid: <input type="text"/>						
Event ID: <input type="text" value="0000000007"/>	Bidder ID: <input type="text"/>						
Event Format: <input type="text"/>	Name: <input type="text"/>						
Event Type: <input type="text"/>	Contact Name: <input type="text"/>						
Event Name: <input type="text"/>							
Bidder Type							
<input checked="" type="radio"/> Vendor							
<input type="radio"/> Customer							
<input type="radio"/> Registered Bidder							
<input type="button" value="Search"/>							
Search Results							
Customize Find First 1-3 of 3 Last							
Event ID	Event Name	Setid	Bidder ID	Name	Location	Event Type	Event Format
UNDP1-0000000007	Construction for TKL primary school	UNDP1	0000000003	Yannick GLEMAREC	001	Blind Bid	Sell Event
UNDP1-0000000007	Construction for TKL primary school	UNDP1	0000000002	Security Delivery Service, Inc.	001	Blind Bid	Sell Event
UNDP1-0000000007	Construction for TKL primary school	UNDP1	0000000001	The Data House	001	Blind Bid	Sell Event

- 3.) Click on the Enter a New Bid hyperlink to enter a new bid.

Chun Chen Enter Bid on Behalf of Yannick GLEMAREC

Bidder Setid: UNDP1	Bidder ID: 0000000003	Bidder Location: 001	
Find First 1-2 of 2 Last			
Business Unit	Event ID	Line	Long Description
UNDP1	0000000007	1	Design
UNDP1	0000000007	2	Construction
Return to Search Enter a New Bid			

- 4.) Enter response on the header response section and line detail section by clicking the 

Note:

The heard section show information such as Event ID, Event Name, Dates and Time Left, all event responses must be entered before the expiration (i.e. end date/time).

Create Response

Event ID: 0000000007 **Event Name:** Construction for TKL primary school **Event Type:** Sell Event Blind Bid
Start Date: 19/09/2006 1:40PM EDT **End Date:** 21/09/2006 4:00PM EDT **Time Left:** 0 hrs, 57 mins, 39 secs
Bid ID: **Bid Date:** **Bid Status:**

The payment & contract information section shows the information such as payment terms, billing location, currency and contact for the event.

Payment & Contract Information

Payment Terms: **Billing Location:** United Nations Development Pro **Contact:** Chun Chen
Event Currency: Dollar **Bid Currency:** US Dollar **Phone:**
Conversion Rate: 1.00000000 **Email:** chun.chen@undp.org
All lines Required: No **Multiple Bids Allowed:** Yes [Comment/Attachments](#)

The description section shows the description of the event.

Description

This is an open invitation to participate the bidding exercise for construction for TKL primary school, which should house 300 students between the age of 5 to 11.

The header response section shows the bid factors users have entered for the event at the header level when creating the event. When creating bids, users can enter response to the questions in this section.

Header Response

View All First 1 of 1 Last					
Question	UOM	Worst	Best	Bid Response	Weighting
What is your average response time	Day	5	1	<input type="text"/>	1.00000

The line detail panel shows break down items for the event. Users can enter the bid information for the specific items by clicking on the icon – users will then be lead to the “Enter Line Response” page.

Line Detail					View All		First 1-2 of 2 Last	
Line	Required	Description	Qty	UOM	Bid Qty	Bid Price		
1	N	Design	1.0000	CS	0			
2	N	Construction	1.0000	CS	0			

The line response page allows user to enter the Qty and line response for the specific items in the line level. Click on “OK” to return to the Create Response page.

Enter Line Response

OK

Recalculate

First 1 of 2 Last

Line Detail

Line: 1 Description: Design

Category: Construction

Event Qty: 1.0000 UOM: CS

Bid Qty:

Extended Price: 0.00 USD

Line Response

First 1 of 1 Last

Question	Worst	UOM	Response	Weight
What is your bid price for this item?	10000		<input type="text"/>	1.00000

Bid Parameters



Minimum Bid Quantity:

Maximum Bid Quantity:

Reserve Price: No



Click on the Info icon to view help text about Bid Parameters.

Once all the responses have been enter for the line, the total bid Qty and price will be reflected on the Line Detail section of the Create Response page.

Line Detail							View All	First	1-2 of 2	Last
Line	Required	Description	Qty	UOM	Bid Qty	Bid Price				
1	N	Design	1.0000	CS	1	7000.000000				
2	N	Construction	1.0000	CS	1	5000.000000				

5.) Click on the Save button to save the bid, and when ready to submit the bid, click on the Post button to enter the bid.

Save

Post

6.) Click on the Ok button to confirm the bid

Bid Confirmation

Your bid has been successfully submitted.

Event ID: 0000000007

Event Name: Construction for TKL primary school

Event Type: Sell Event Blind Bid

Start Date: 19/09/2006 1:40PM EDT

End Date: 21/09/2006 4:00PM EDT

Time Left: 0 hrs, 44 mins, 1 sec

Bid ID: 1

Bid Date: 21/09/2006 3:15:50PM EDT

Your Total Price: 12,000.00 USD

OK