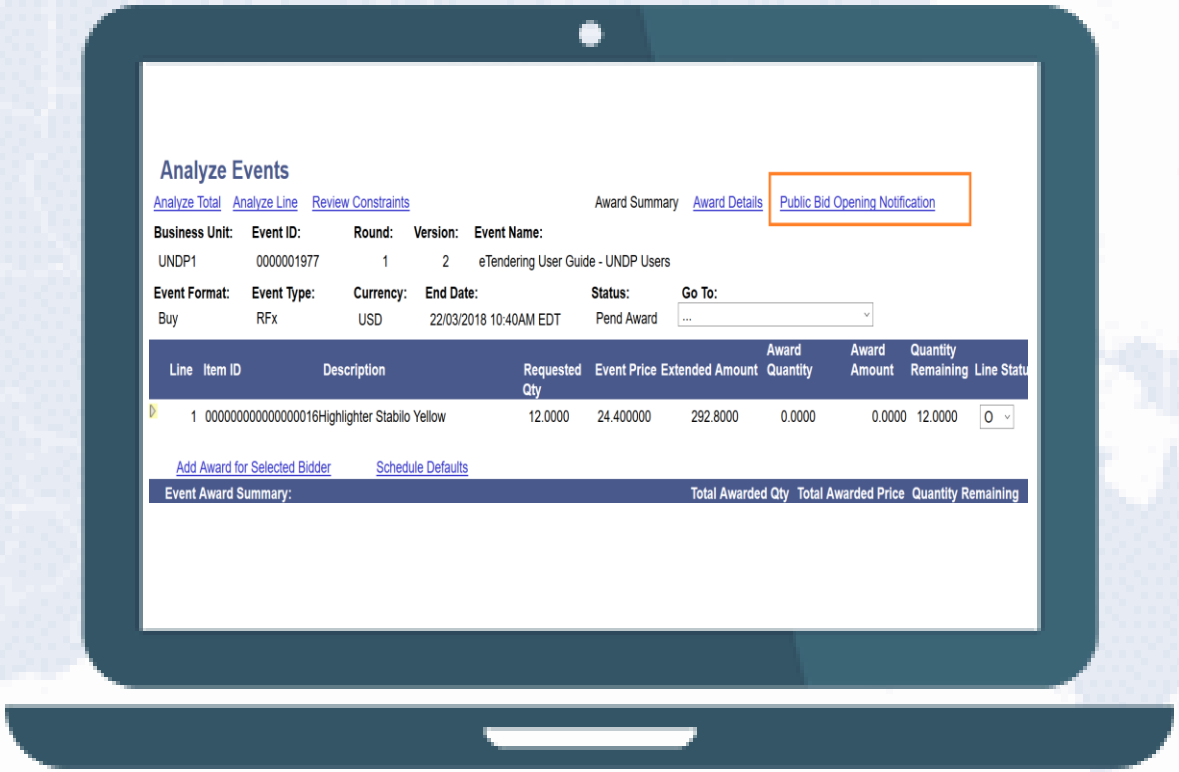
UNDP eTendering:
User Guide for Buyers
April 2018



Empowered lives.
Resilient nations.

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.

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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.

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Paper Bid Submissions

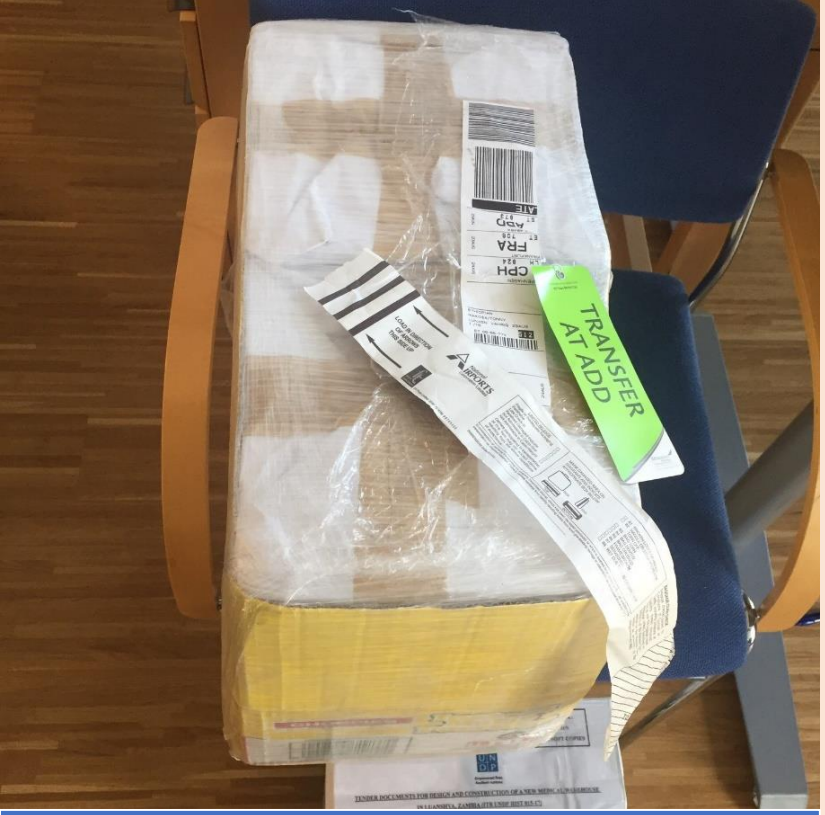


1.1 Why Use eTendering?

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.

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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.).

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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.

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1.2 Who is using eTendering?

As of February 2018 the main users of eTendering are:

*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**.*

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.

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

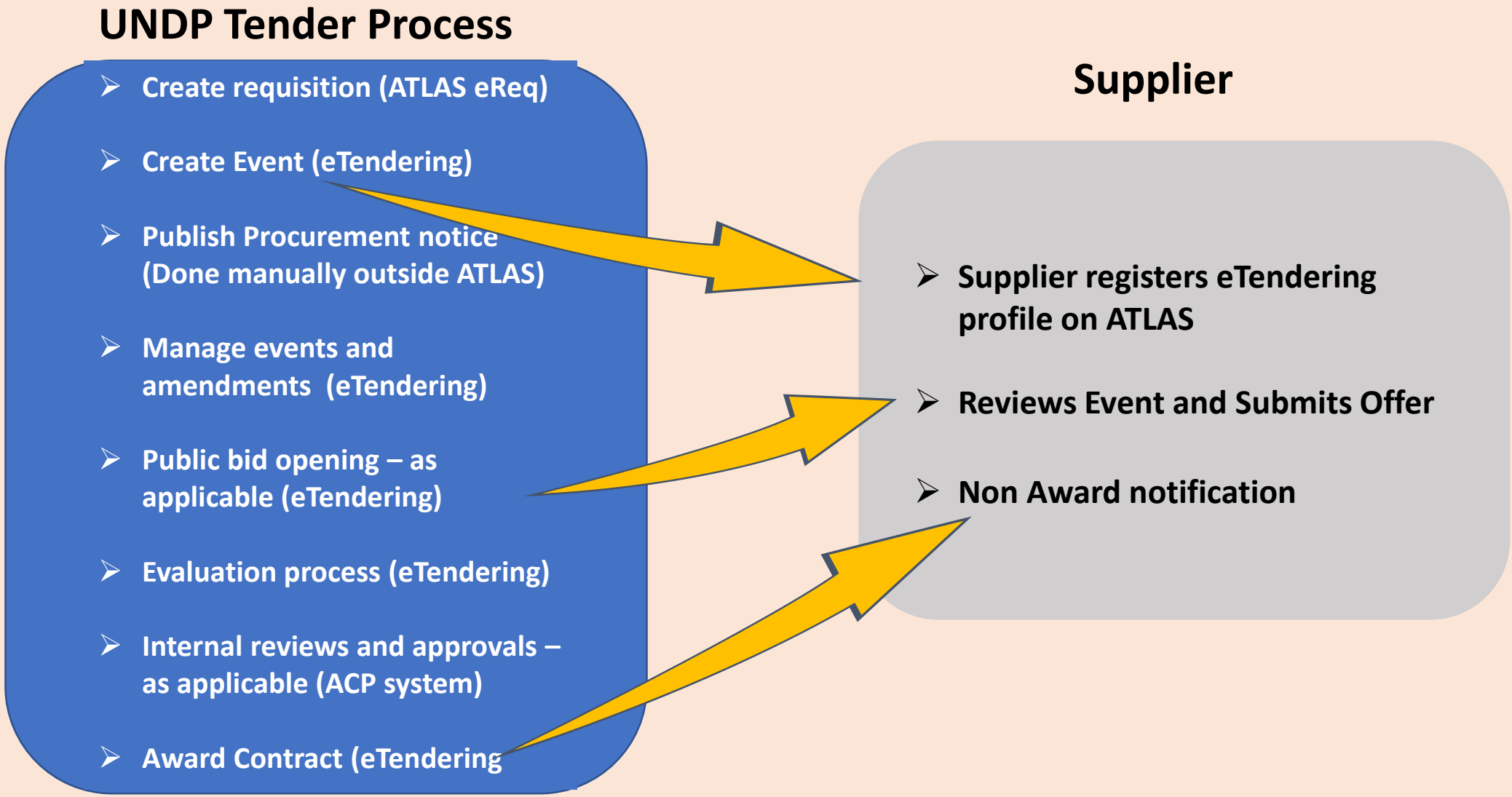
RBA: 7 offices with over **20 tenders** in total **Biggest users:** Zimbabwe, Nigeria, Burkina Faso, Angola.

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

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

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1.3 eTendering workflows



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2.0 Launching eTendering in my Office

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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.



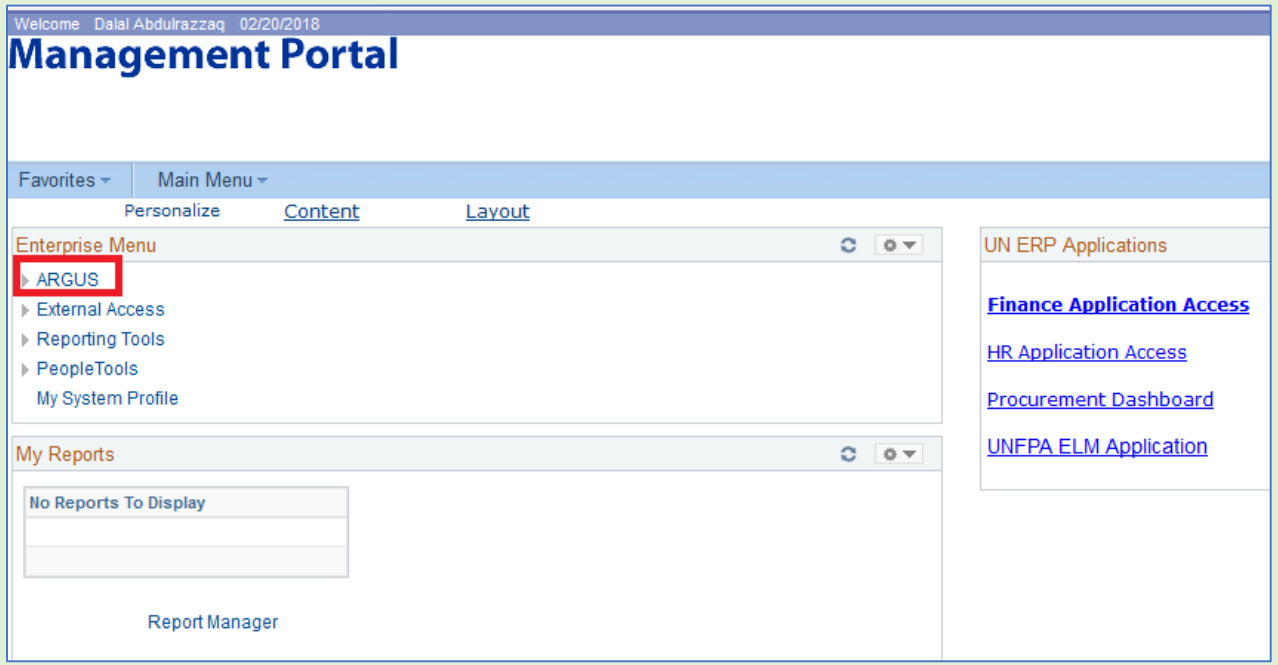
Click to return to Launch eTendering Main Page



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".***



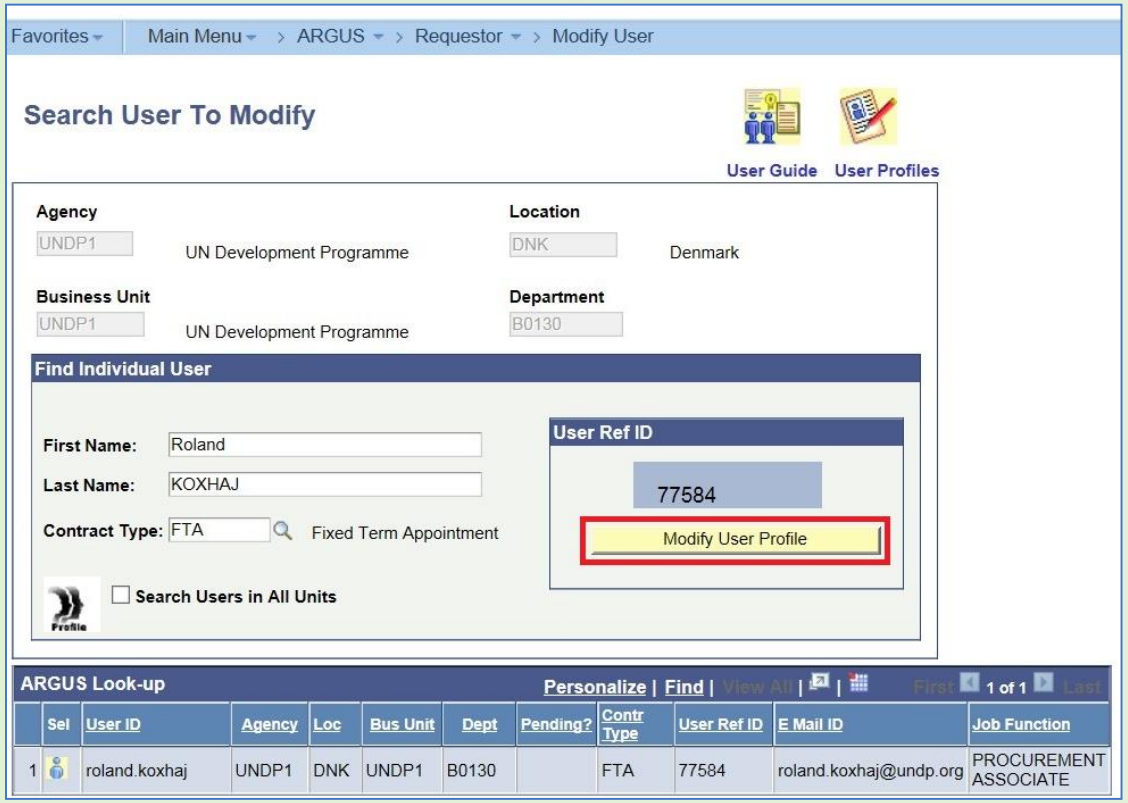
2 Click on ***"Requestor"*** → ***"Modify User"***



Click to return to Launch eTendering Main Page

2.3 Assign Event Approver role

3 Click on "***Modify User***" Profile



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



Click to return to Launch eTendering Main Page

3.0 eTendering at a Glance

Click to return to TOC

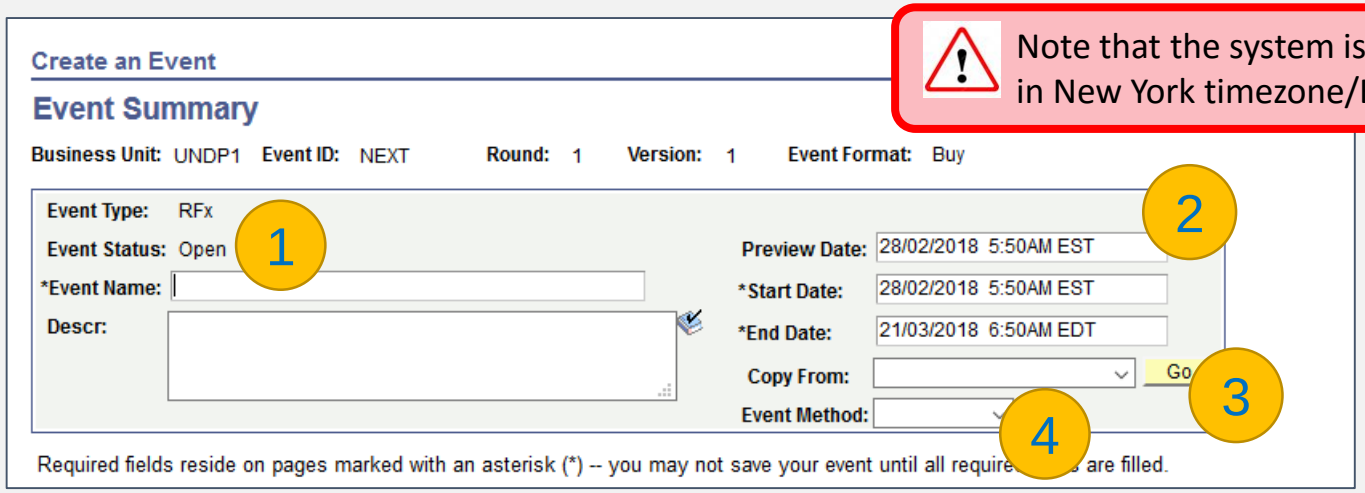
This section provides a quick breakdown of the key pages and corresponding functions in eTendering that enable buyers to create, manage and analyze events. Each key function is summarized in a table and where relevant, hyperlinked to the more detailed instructions in this guide.

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

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 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.***



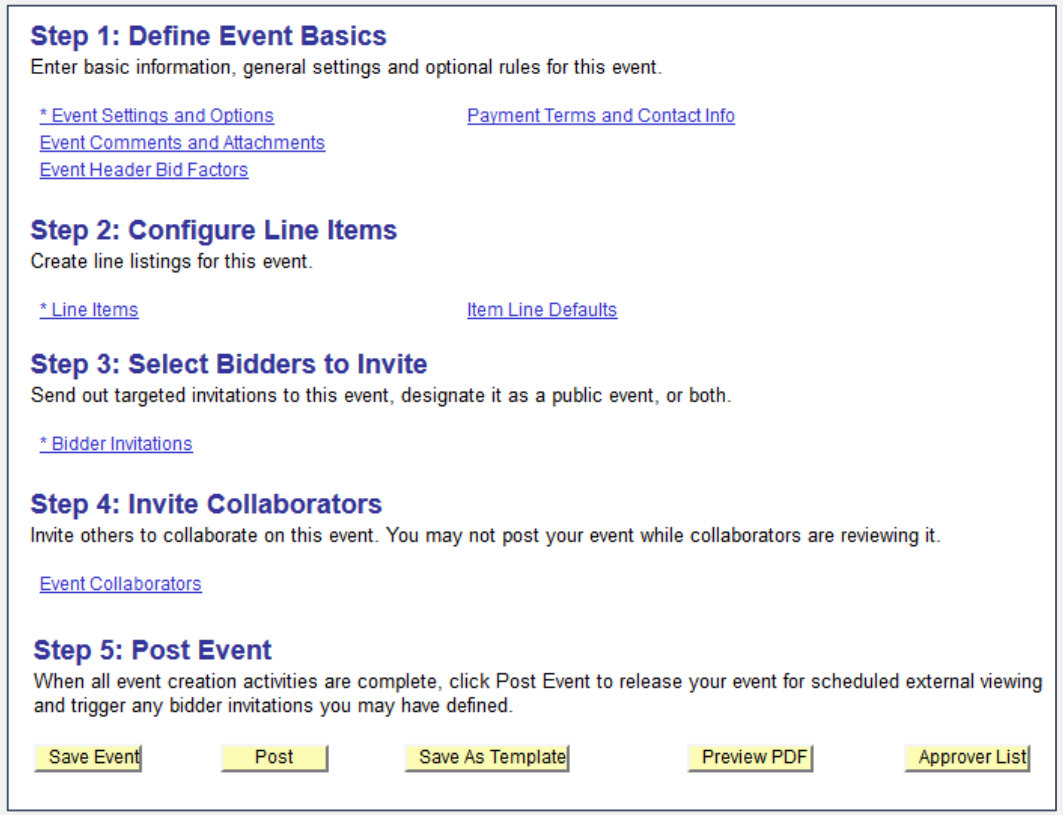
Note that the system is set in New York timezone/EST

View more detailed instructions on launching and creating an event on eTendering here.

Reference	Description
Event Name **Descr** 1	Title of the tender process. In the Descr field, you can enter any general text, e.g. cover page of the solicitation document. This information is captured in the PDF file generated by system and email notifications sent to bidders.
1. Preview date **2. Start date** **3. End date** 2	1. The date bidders can view the event and download attachments in eTendering. 2. The date bidders can start submitting bids. 3. The deadline for submission of bids.
Copy From 3	The buyer can copy details to the event from a template or a previous event here.
Event Method 4	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.

Click to return to eTendering at a Glance Main Page

3.1 Create an event: Event Summary



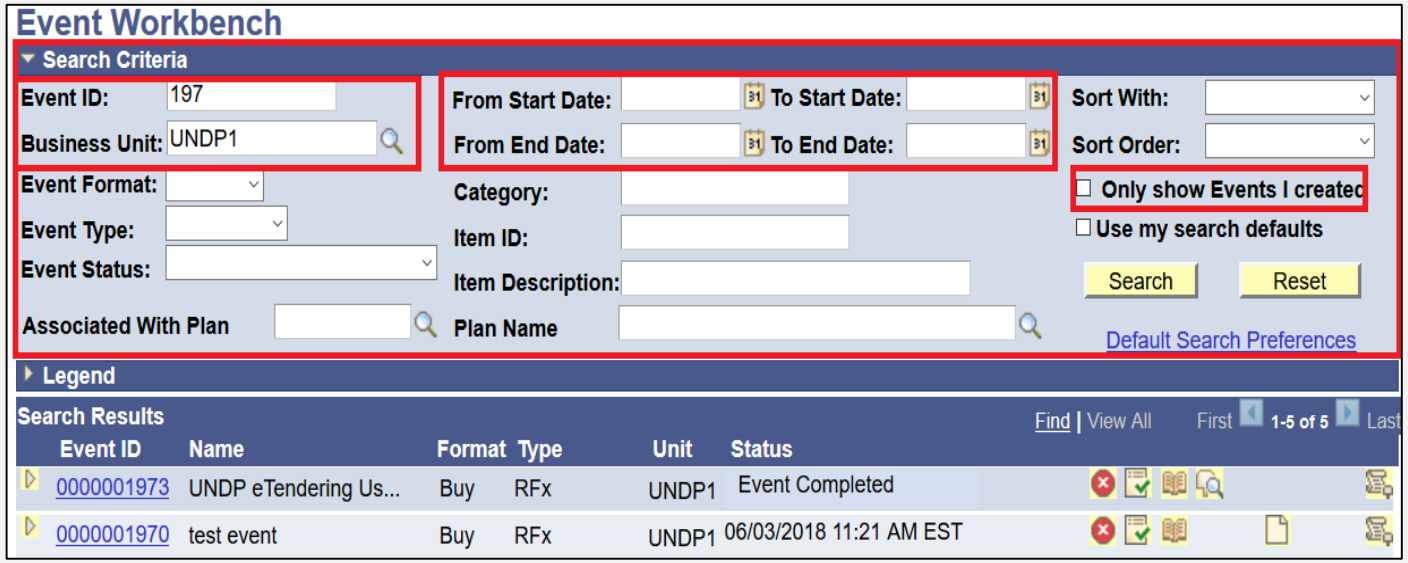
Even if an event is posted on eTendering, Tender notices must always be posted on the UNDP website, UNGM etc.

Reference	Description
Step 1: Define Event Basics	**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). **Event Comments and Attachments:** Buyers can upload solicitation documents and other forms part of the tender documents. **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. **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
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	**Save event:** Click on Save event to save event details that have been added before posting. Save often so you don't loose information entered. **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. **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.

Click to return to eTendering at a Glance Main Page

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.***



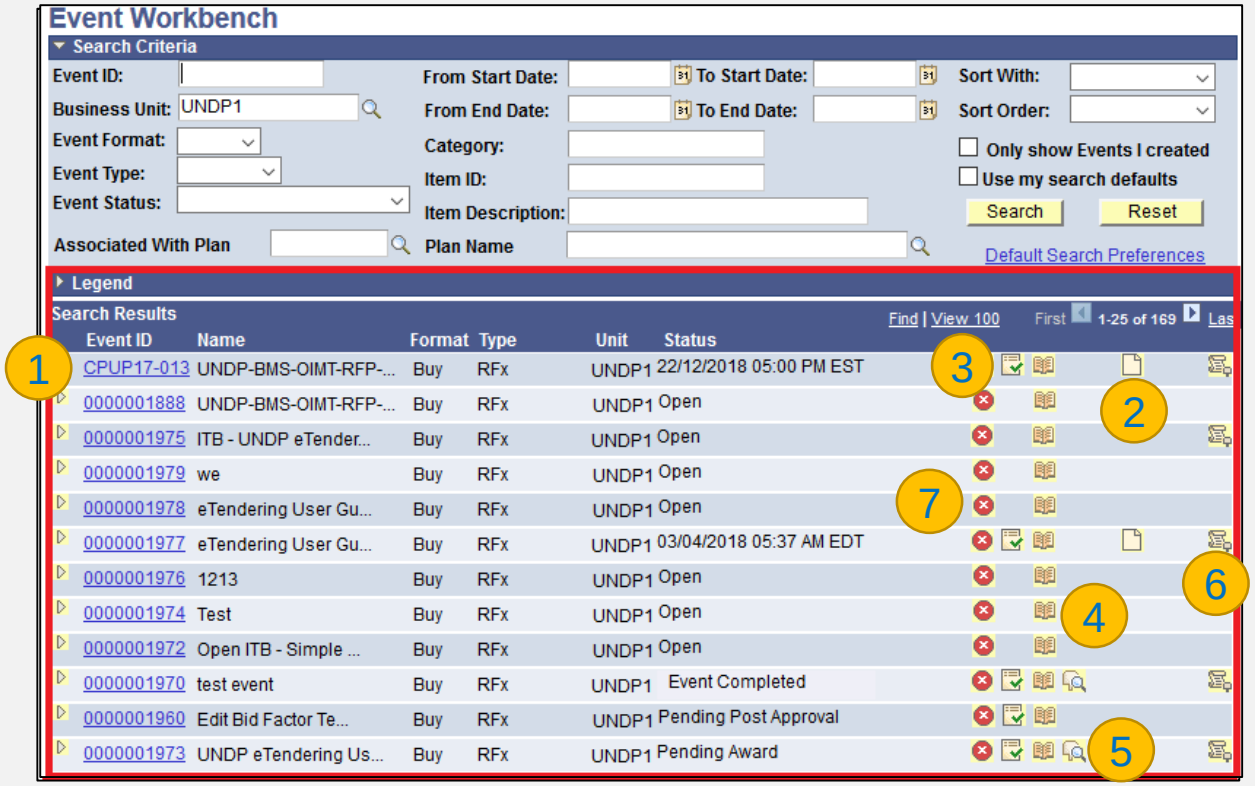
How to Search for Events

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

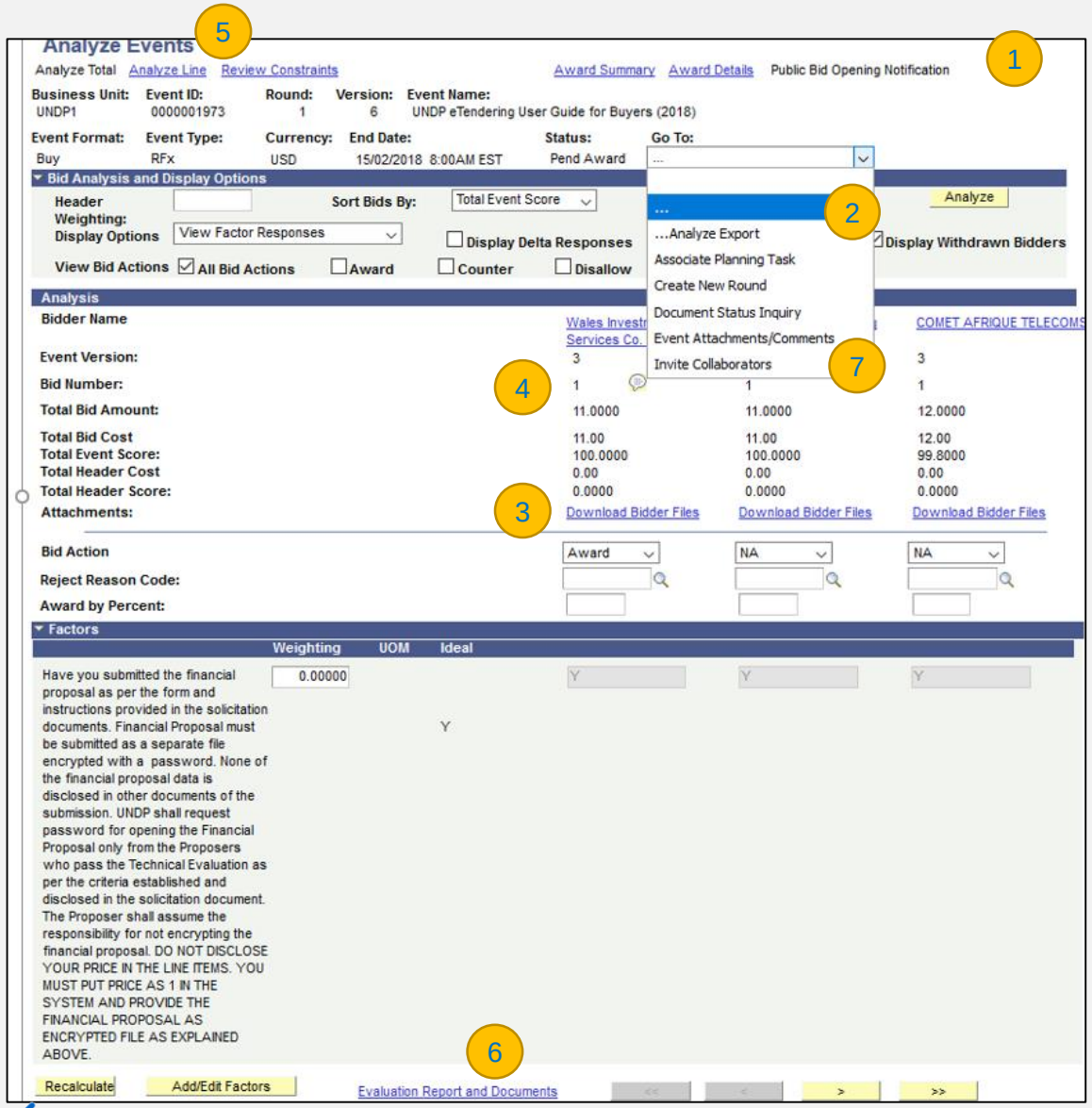


Please note It is important to filter to the correct event to avoid accidentally making changes to other events.

Reference	Description
Event ID 1	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 2	Click here to make amendments to an event. Changes made are not visible to bidders until approved. NOTE: 1. Cannot create and/or approve a new version of an event if the deadline of the previous event has already passed. 2. Be aware of impact to bids when editing line items or bid factors. Read detailed instructions for further explanations.
Approva Status 3	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 Even History 4	This is where the buyer can find and view previous event versions, and see who last modified an event version and when.
Analyze events 5	After an event deadline closes, this icon will appear which enables buyers to: 1. View all bids, including prices and attachments. 2. Generate the public bid opening report if applicable. 3. Use the evaluation module to evaluate bids 4. Create Purchase Order and Vendors.
View Bic History 6	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 7	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

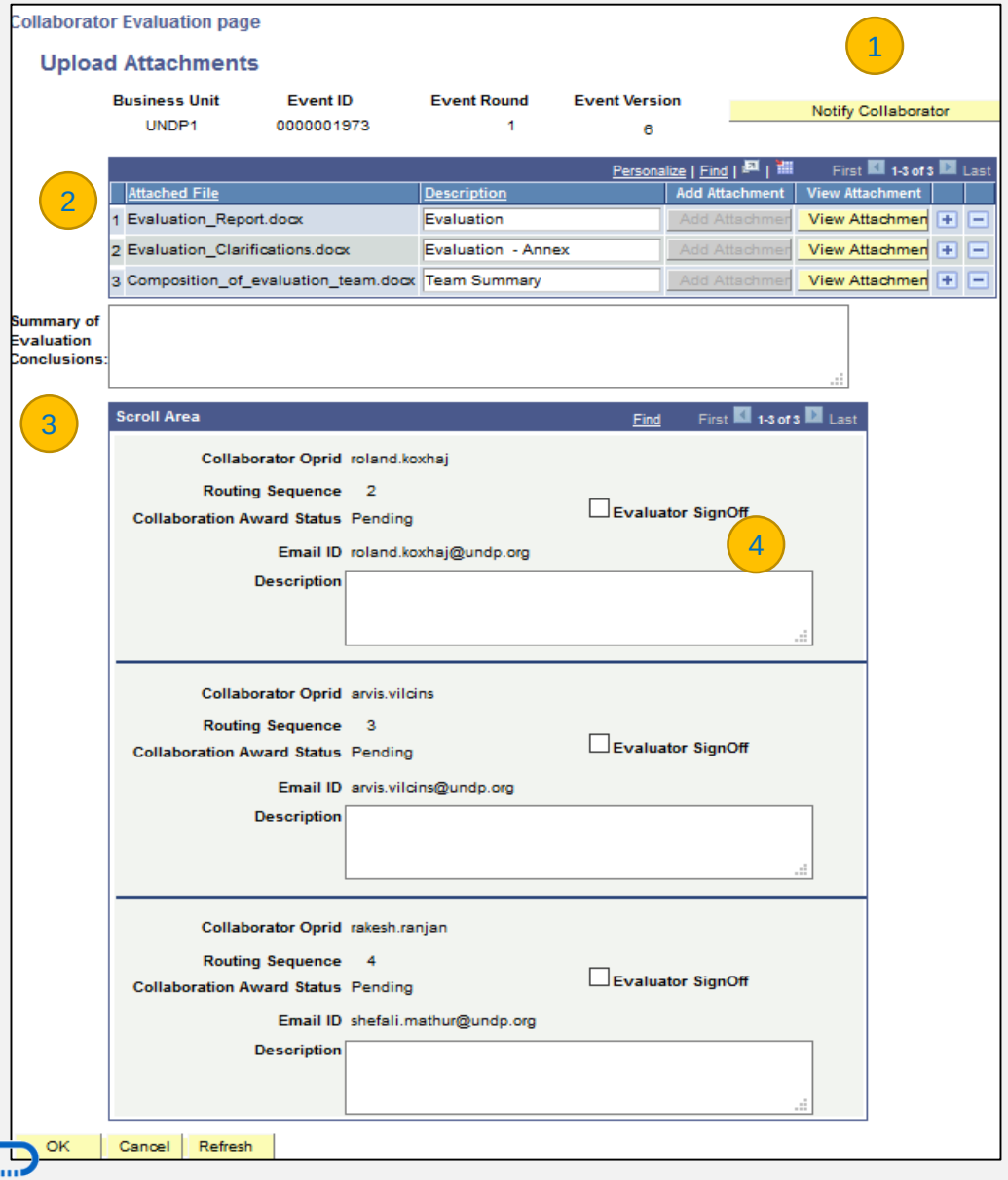
3.3. Open and download bids



Click to return to eTendering at a Glance Main Page

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.

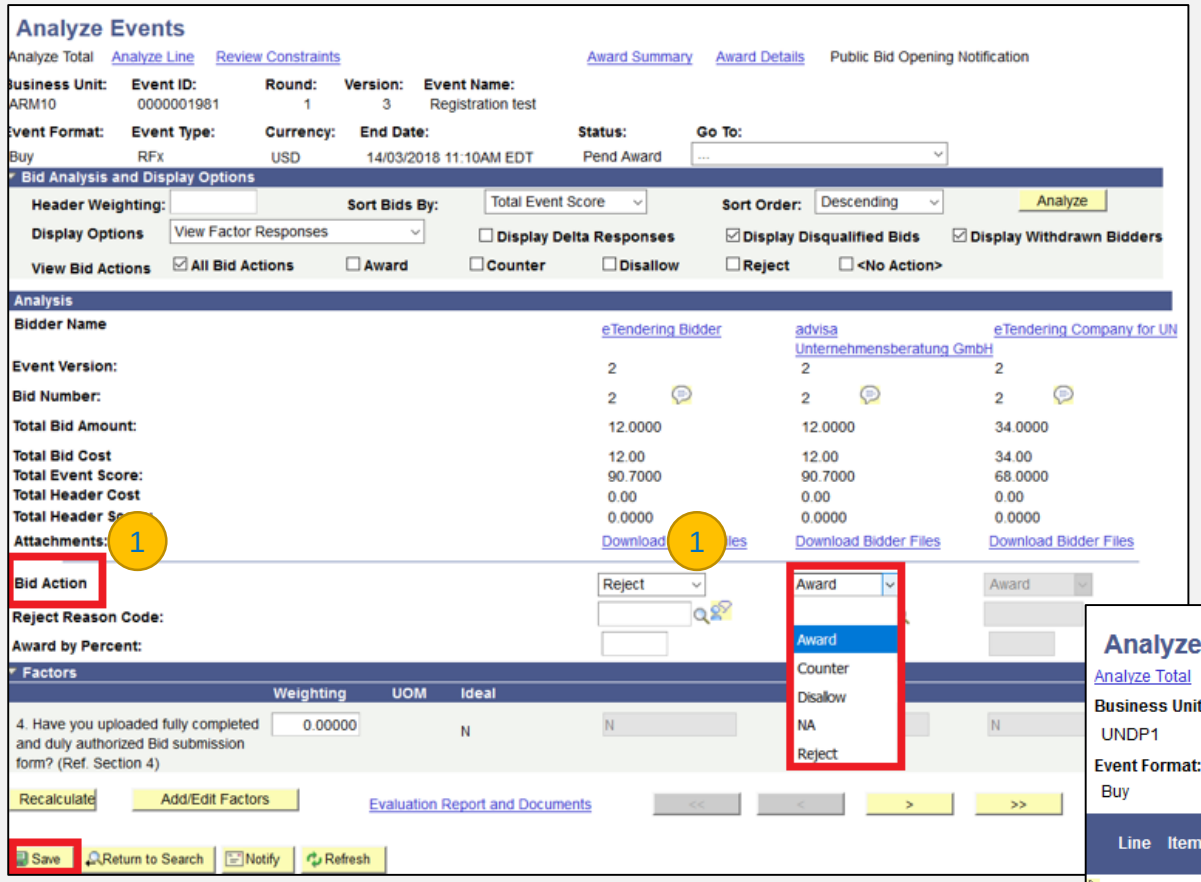
3.4 Evaluation process management feature



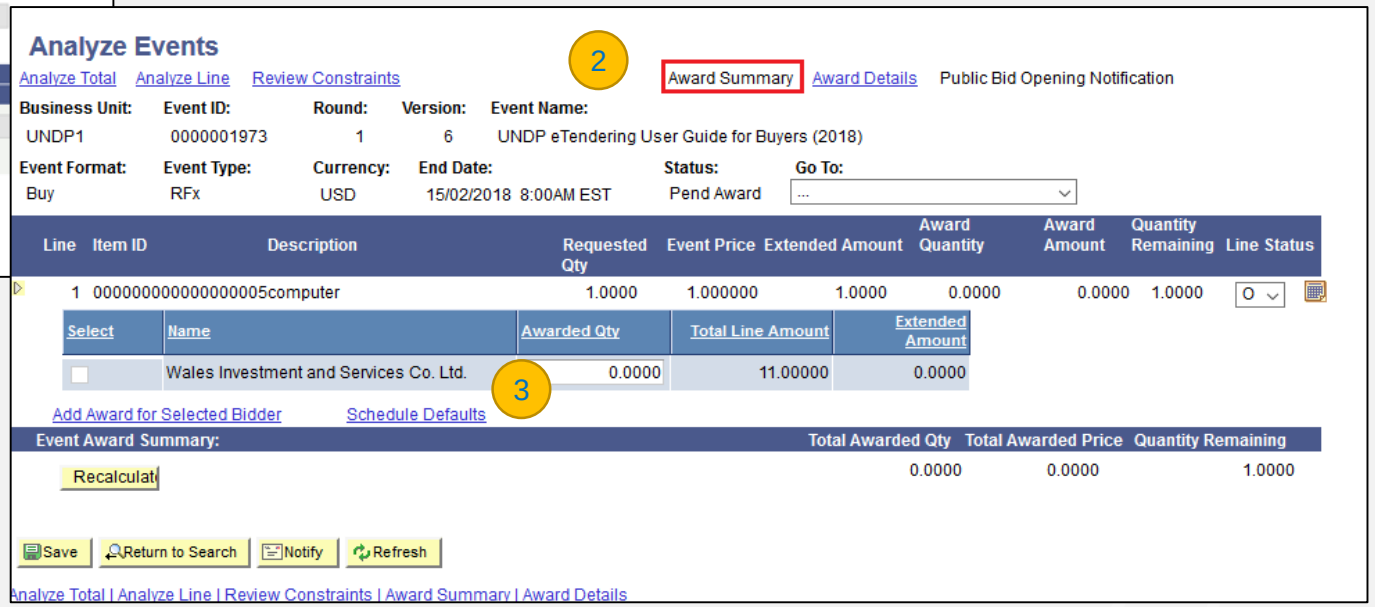
Click to return to eTendering at a Glance Main Page

Reference	Description
Notify collaborator 1	Once the procurement officer creates the evaluation committee by inviting members as ***"Collaborators"*** 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.

3.5 Award Tender



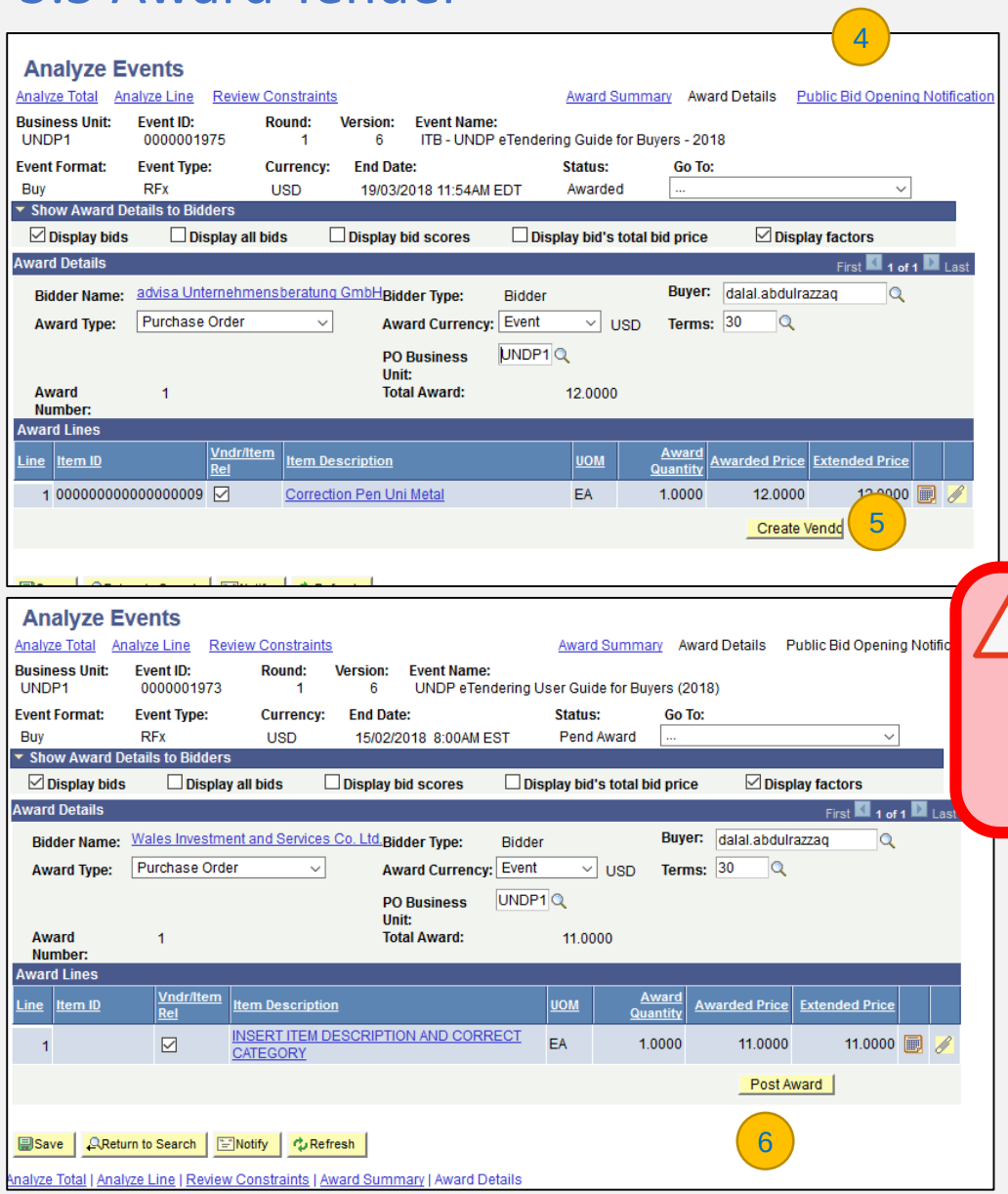
Reference	Description
Award Status 1	The ***Award Status*** is where the award decision for each bidder is indicated. To do this, the buyer must first navigate to the Analyze Events page, and from the drop-down menu at the ***Bid action*** level, select whether the bidder is ***"Awarded", "Rejected"*** 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.



*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



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

Click to return to TOC

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
Is it an RFP, ITB, RFQ, or IC?	This is important because it will determine which template will be used for the event.
Is it an open or limited competition?	If the event is a limited competition, the **shortlisted bidders need to be registered in the system so they can be invited to the event.**
Will there be any LOTs? Construction of price schedule.	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.
Is partial bidding allowed?	This needs to be reflected in settings in the system to allow or not allow bidders to quote for only some items.
What are the minimum requirements and other evaluation criteria?	Some of the minimum requirements can be captured in the bid factors.
What will be the bid currency? Are other bid currencies allowed?	This information can be reflected in the event setup.
What is the expected deadline for submission of bids?	Deadlines need to be specified during event set-up.
Who will be the focal point?	To include in the event.

Click to return to Launch a Tender Main Page

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/oolts/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

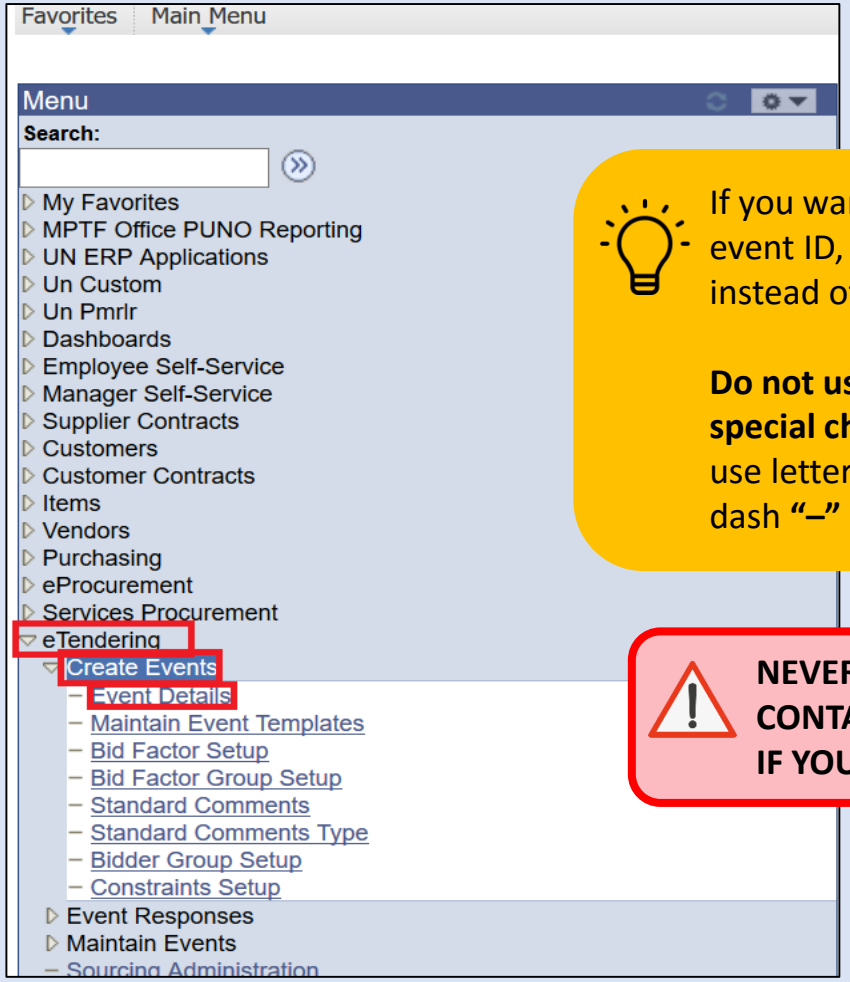
Please note that when uploading files, the following restrictions and specifications must be followed:

- 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.**

Click to return to Launch a Tender Main Page

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***.

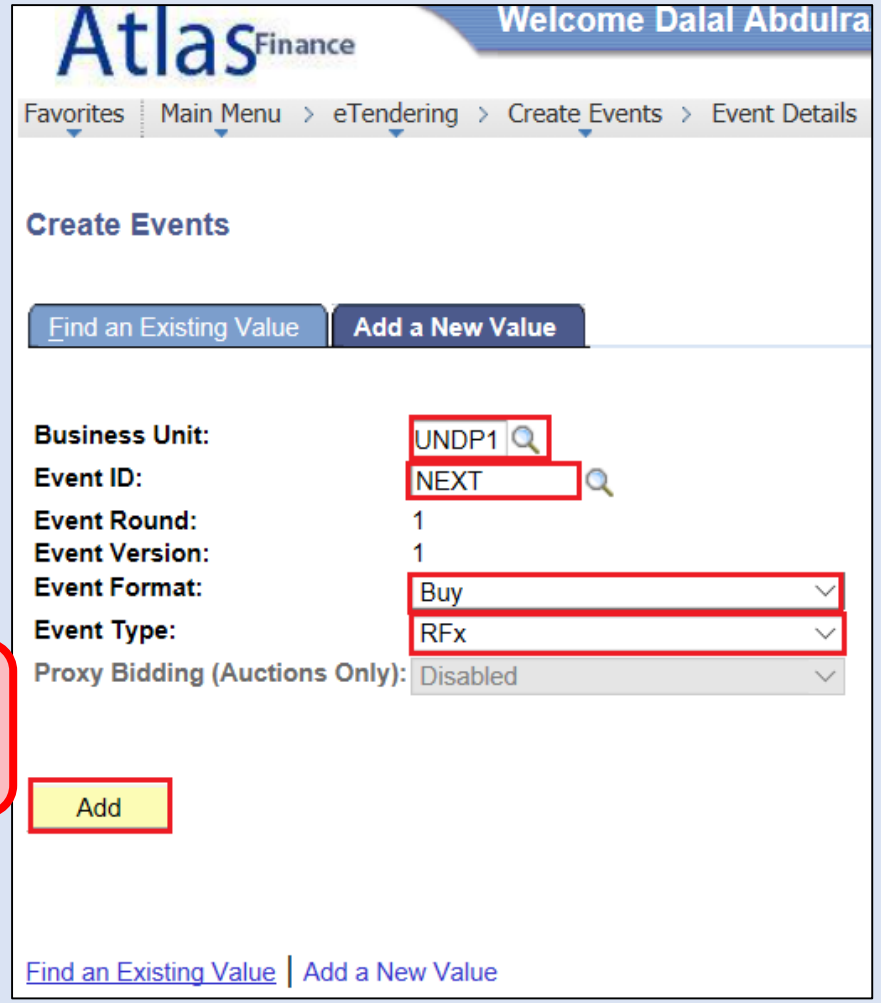


If you want to customize the event ID, enter a unique ID instead of **"NEXT".**

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

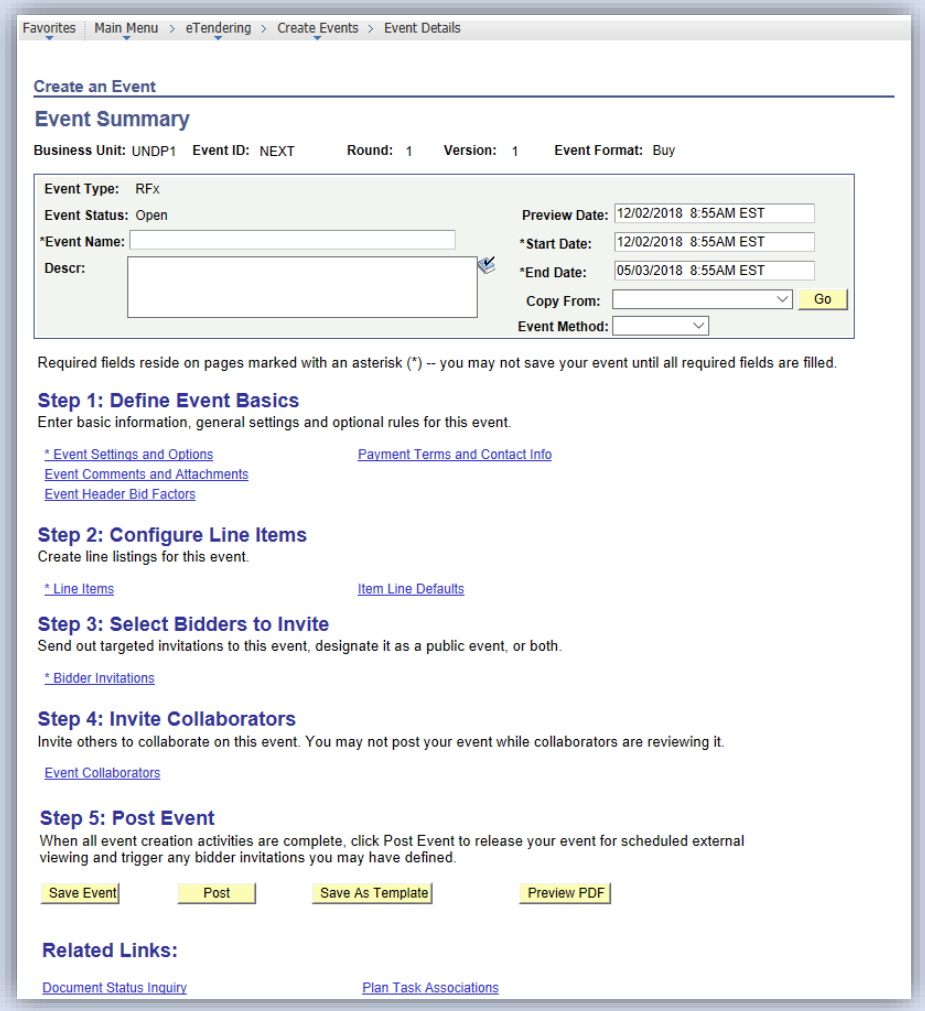
2 To add an event, enter your Business Unit (BU). Leave the Event Format as ***"Buy"*** and Event Type as ***"RFx"***. Then, click on ***"Add".***



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.



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

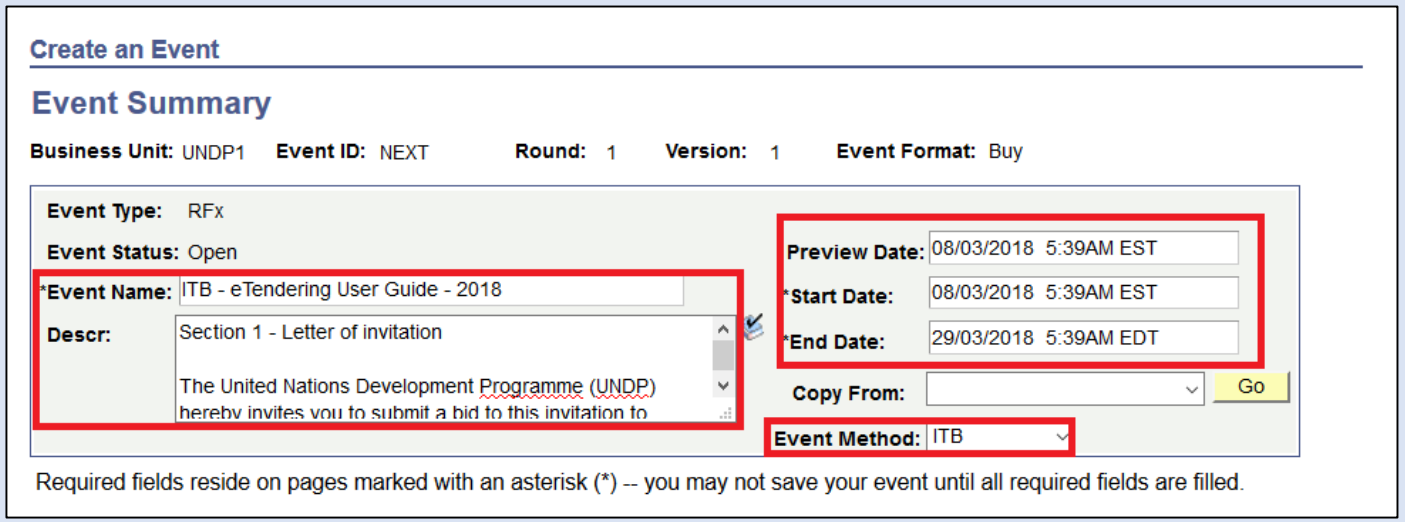
1. Create an event copying from an eTendering Template
2. Create an event copying from another event
3. Create an RFP
4. Create an event with LOTs
5. Create an RFI

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.



- **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.

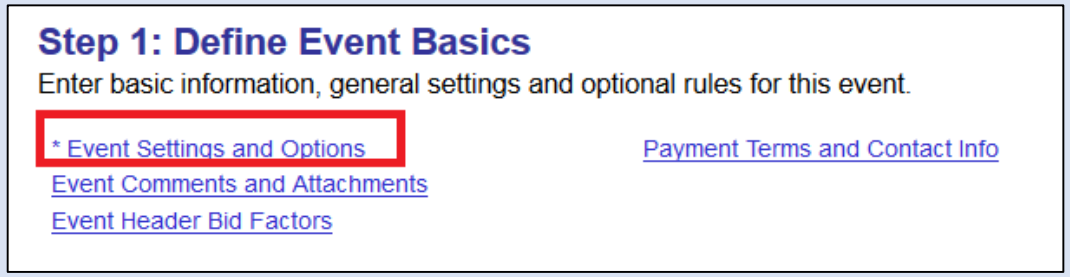
When you have completed the fields, press ***"Save"***.

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.

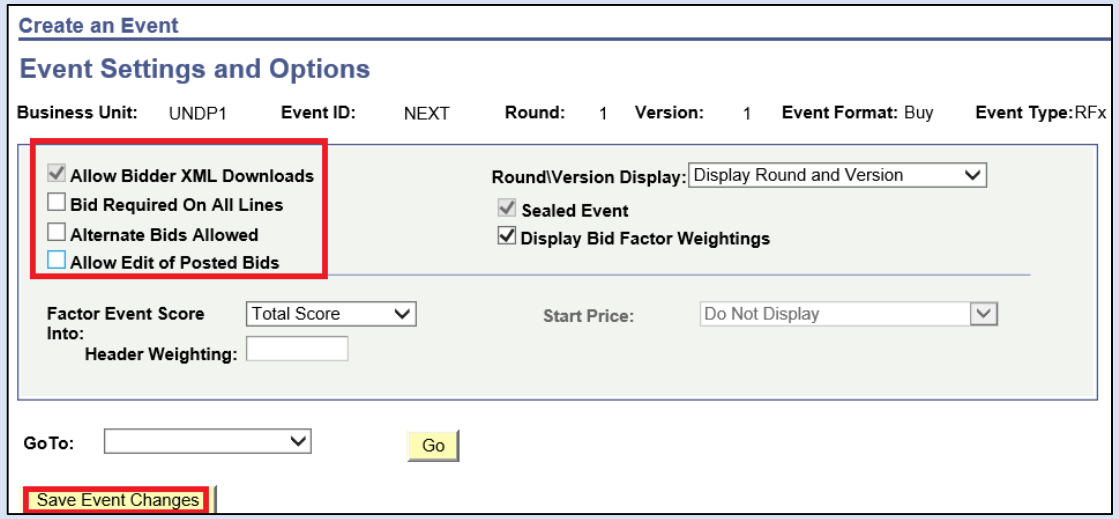
Click to return to Launch a Tender Main Page

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.



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



The following 3 event settings are available:

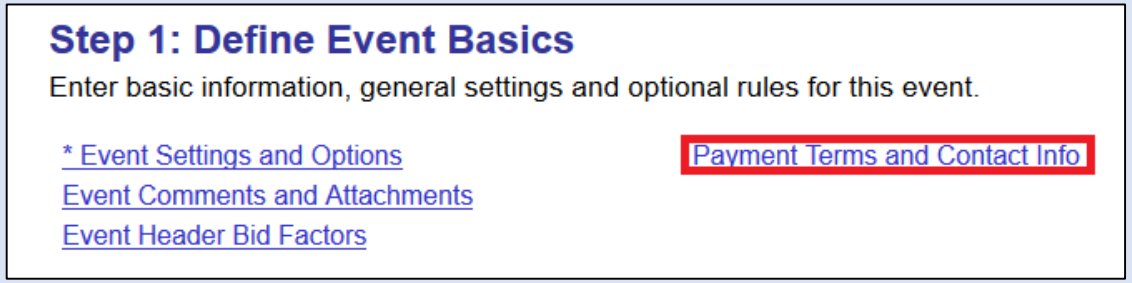
1. **Bid required on all Lines:** Enables or disables partial bidding. If checked bidders will not be able to submit their bid unless it contains price information for all line items. If unchecked, partial bidding is allowed.
2. **Alternate Bids Allowed:** Allows bidder to submit multiple bids in the 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

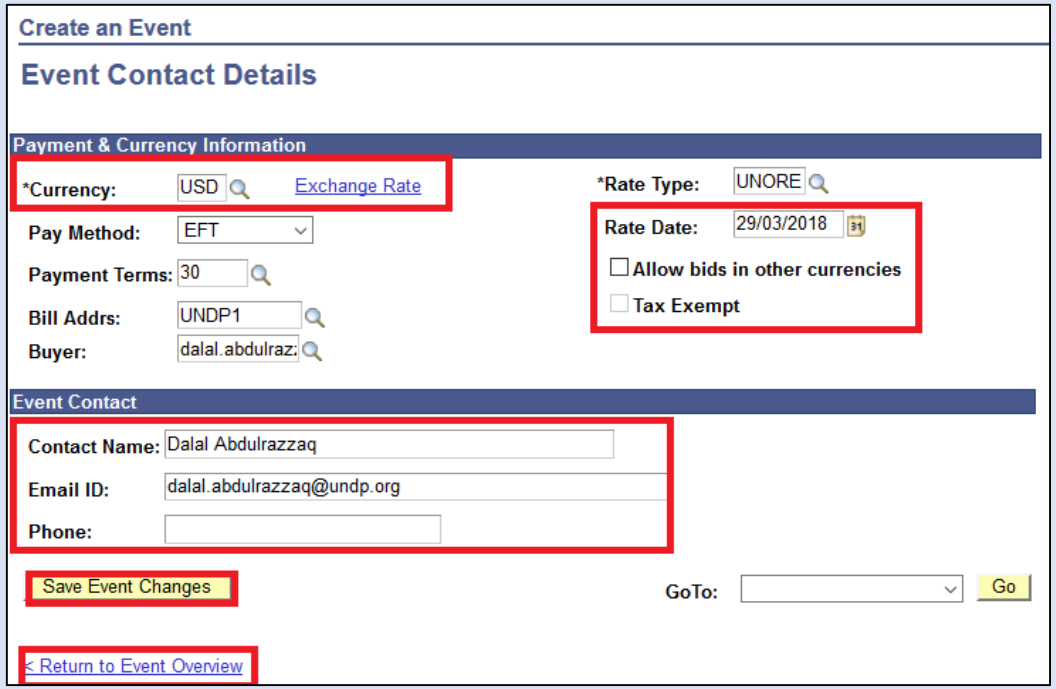
4.2 Create an Event - Payment Terms & Contact Info

Next, go to ***"Payment Terms and Contact Info"***



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

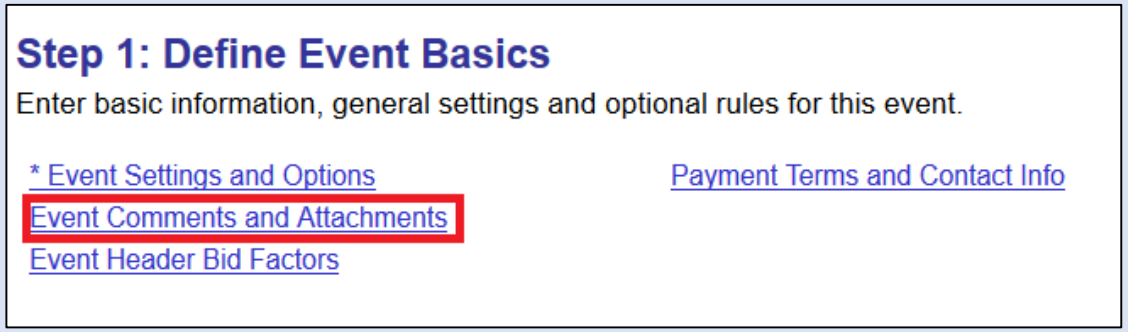


When all selections are made, click "***Save Event Changes***" and then ***"Return to Event Overview".***

Click to return to Launch a Tender Main Page

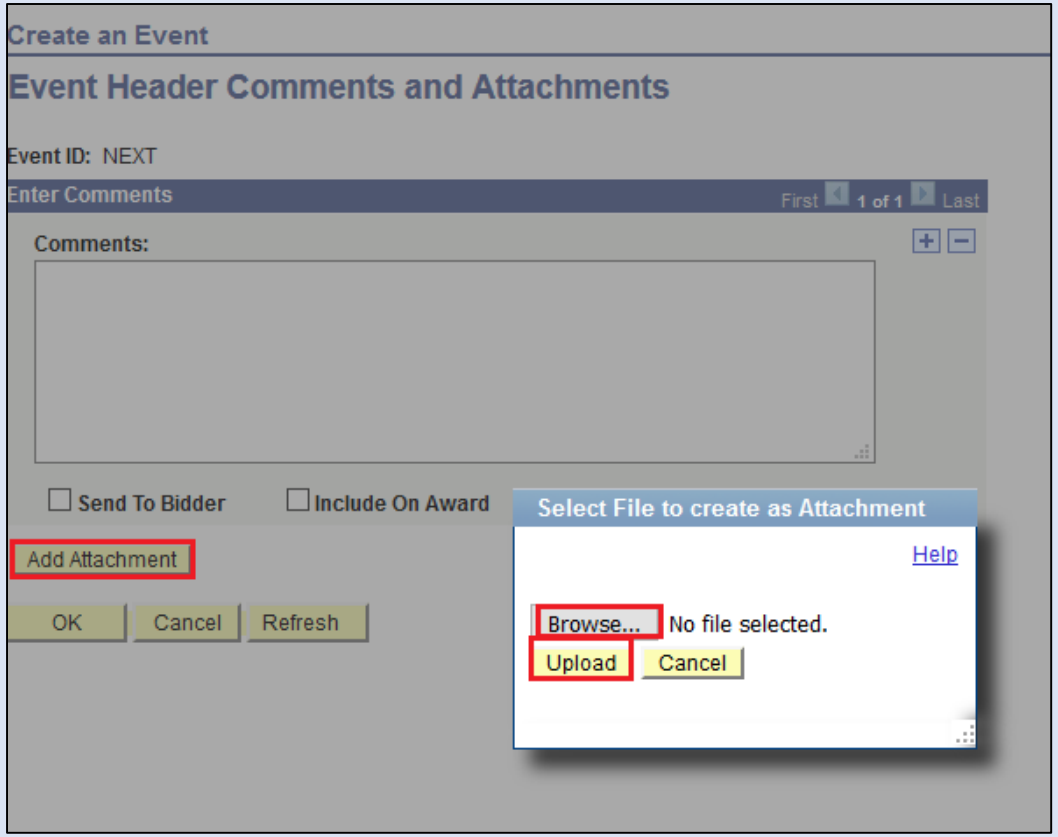
4.2 Create an Event – Add Event Comments & Attachments

Next, click on "***Event Comments and Attachments".***



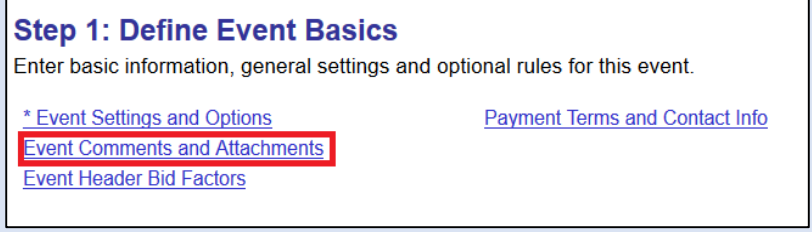
You can upload all tender documents, including returnable forms which bidders will be able to access from their portal.

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



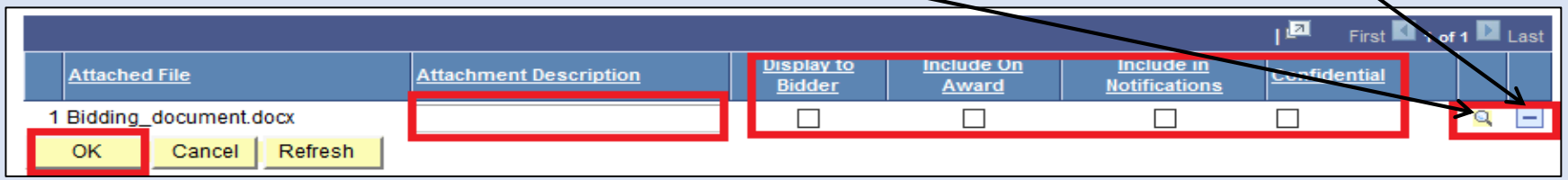
Click to return to Launch a Tender Main Page

4.2 Create Event – Add Attachments



In order to view the attachment, click the magnifying glass

To remove an attachment, press the minus sign.



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

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

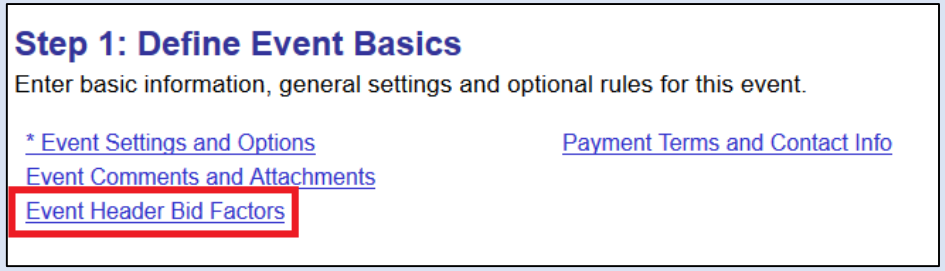
- ✓ **Attachment Description**: Add a brief description of the file here.
- ✓ **Display to Bidder**: If this is checked, the document can be viewed by the bidder. If not, it is only viewable by UNDP buyers.
- ✓ **Include on Award**: If this is checked, the file will be automatically attached to the Purchase 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.

Click to return to Launch a Tender Main Page

4.2 Create an Event – Event Header Bid Factors

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



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.

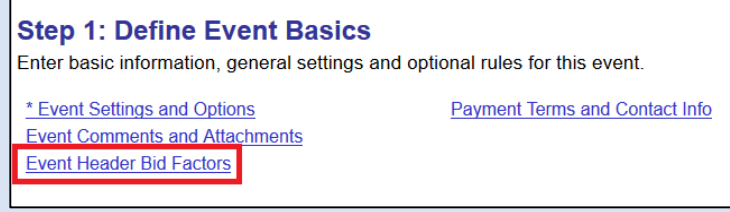
6 Types of Bid Factors available

***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



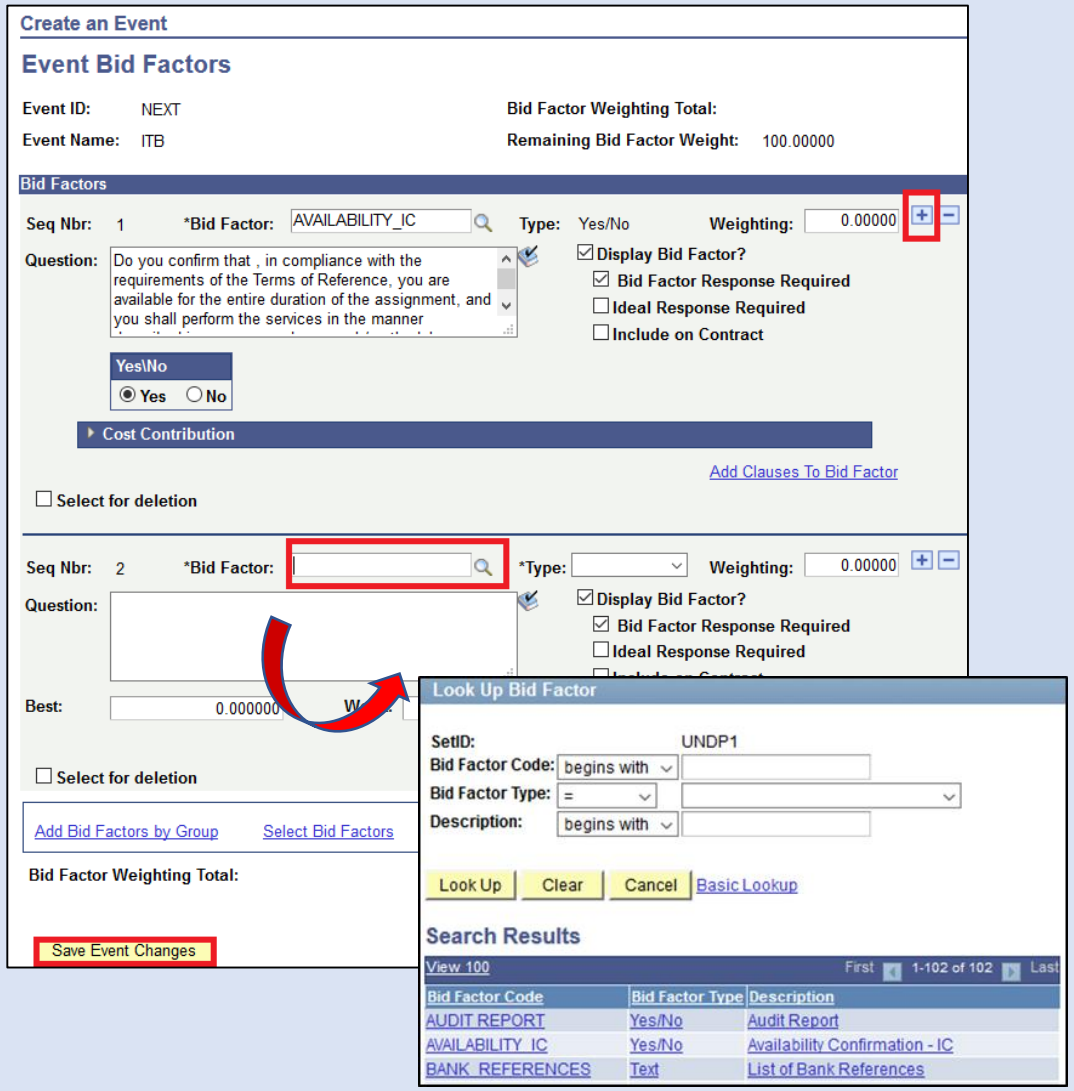
If you have started creating an event by copying from a template, there may be bid factors that are automatically transferred to the event bid factor section. If you wish to remove any of these bid factors, you may do so by clicking on the **minus sign** next to the bid factor

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.

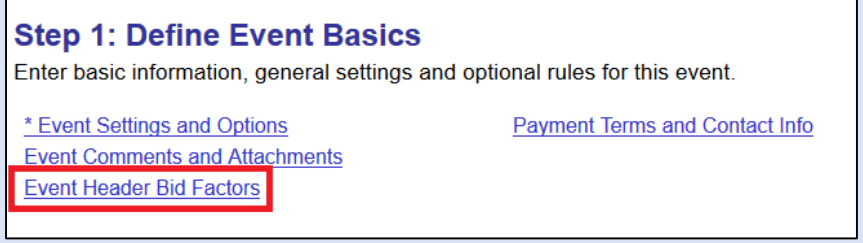


Which Bid Factors to Include and How Many?

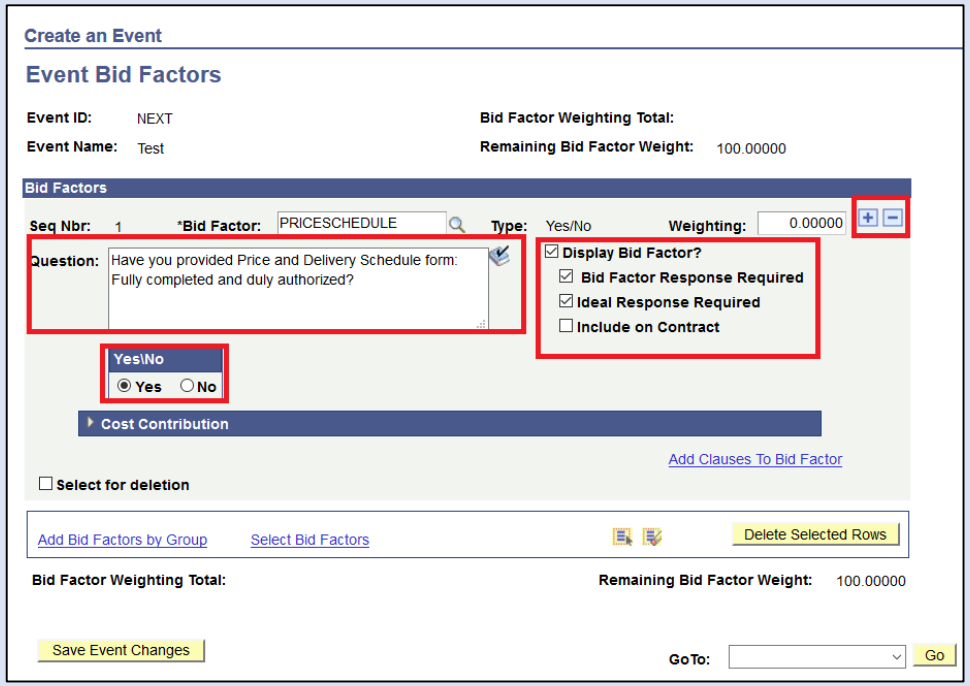
It is up to the procurement office to determine what bid factors to use for each event. This has to be determined based on the specifics of each case and also on the familiarity of potential bidders with the system. More bid factors facilitate the evaluation process and makes it easier for UNDP to assess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

Click to return to Launch a Tender Main Page

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**.



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

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.

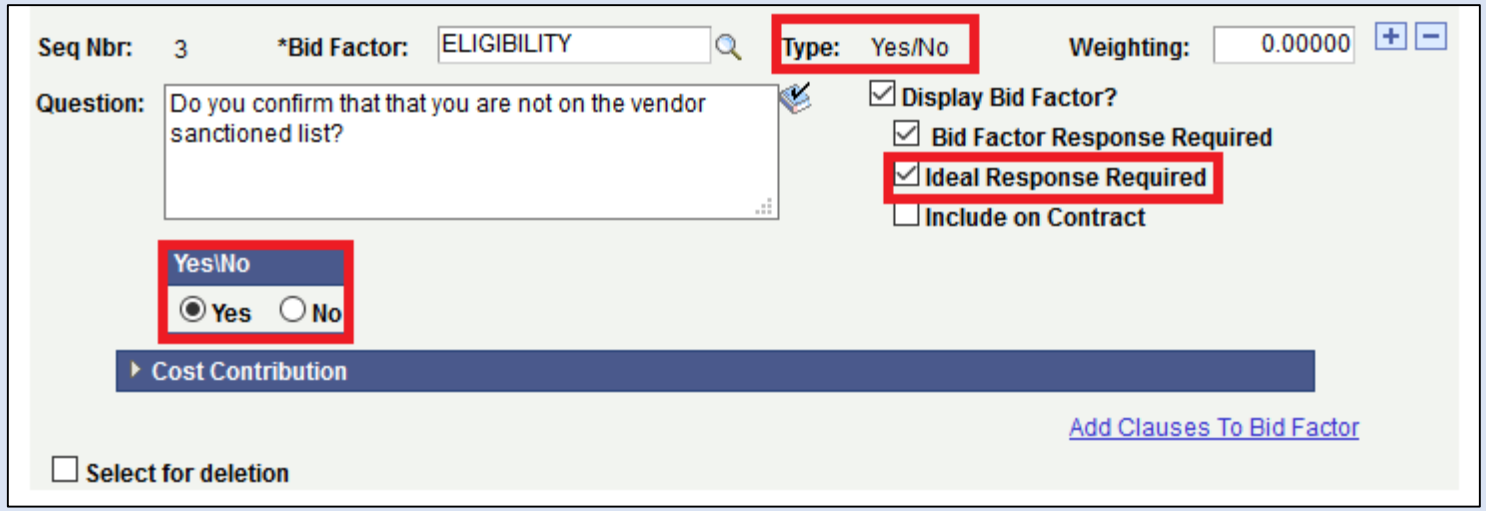
Please note Only check ***Ideal Response Required*** for the **Yes/No** type of Bid Factors. Otherwise, the bidder will not be able to submit an offer with anything else than the best response indicated by the buyer.

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

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….?*"



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.?*

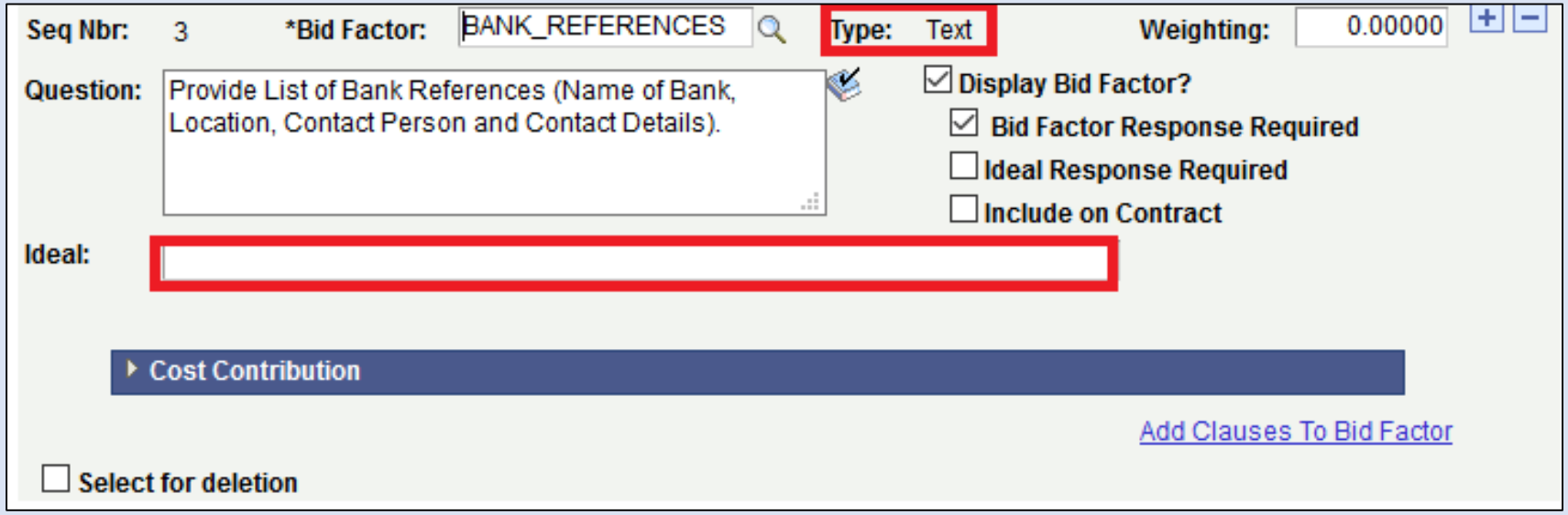
THE MOST COMMON AND SIMPLE BID FACTOR TYPES ARE YES/NO AND TEXT. Avoid using other types of bid factors until you are familiar with how they can be used.

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:

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.

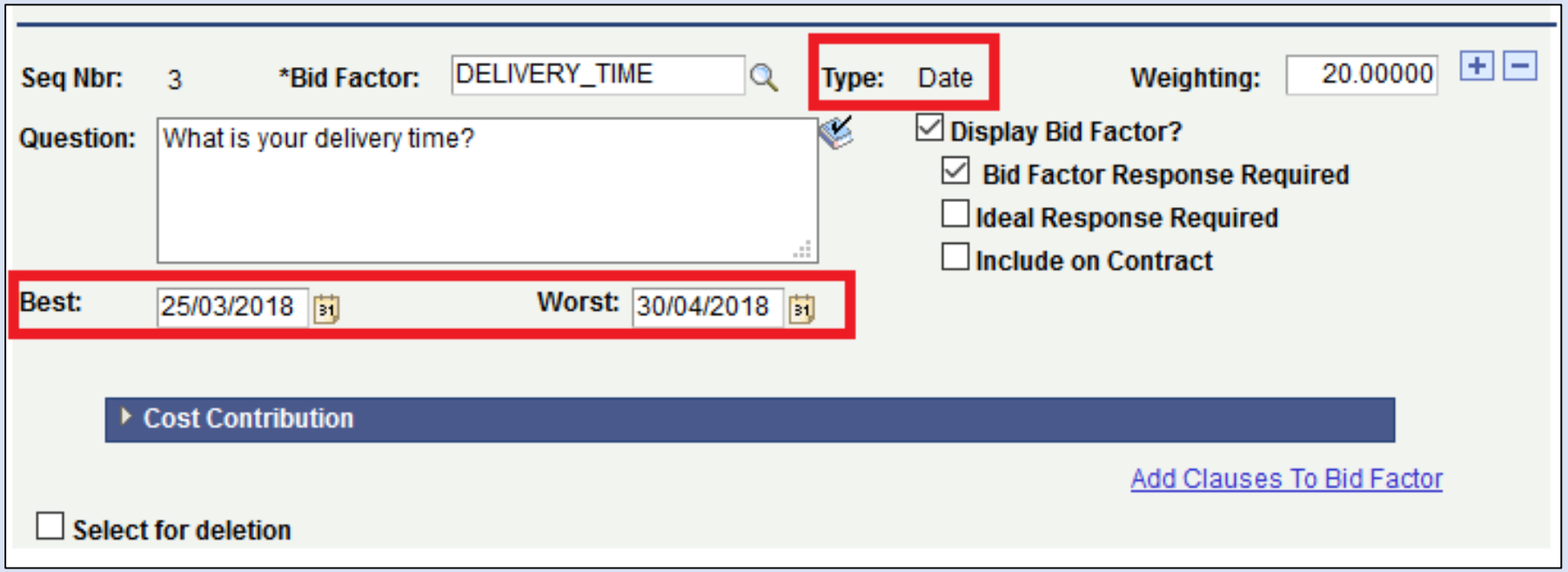


Click to return to Launch a Tender Main Page

4.2 Create an Event – Event Header Bid Factors

Tips for setting up different types of Bid Factors:

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.

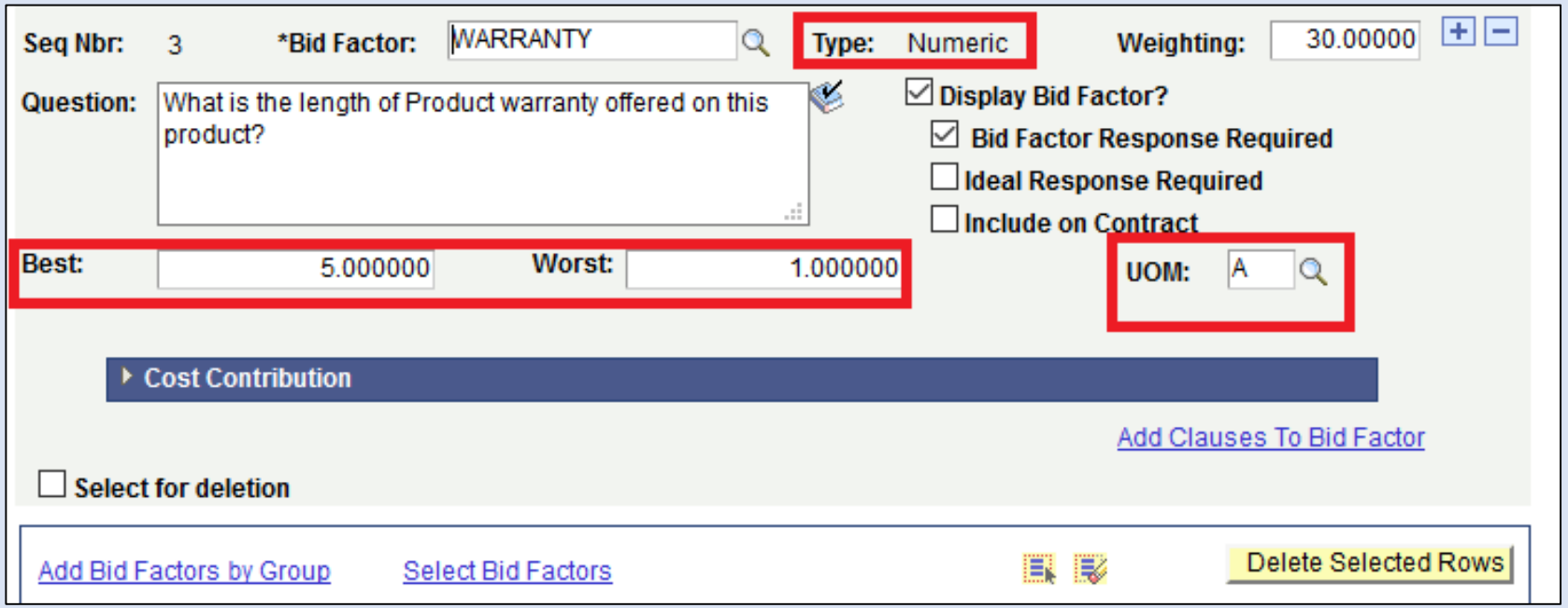


Click to return to Launch a Tender Main Page

4.2 Create an Event – Event Header Bid Factors

Tips for setting up different types of Bid Factors:

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.

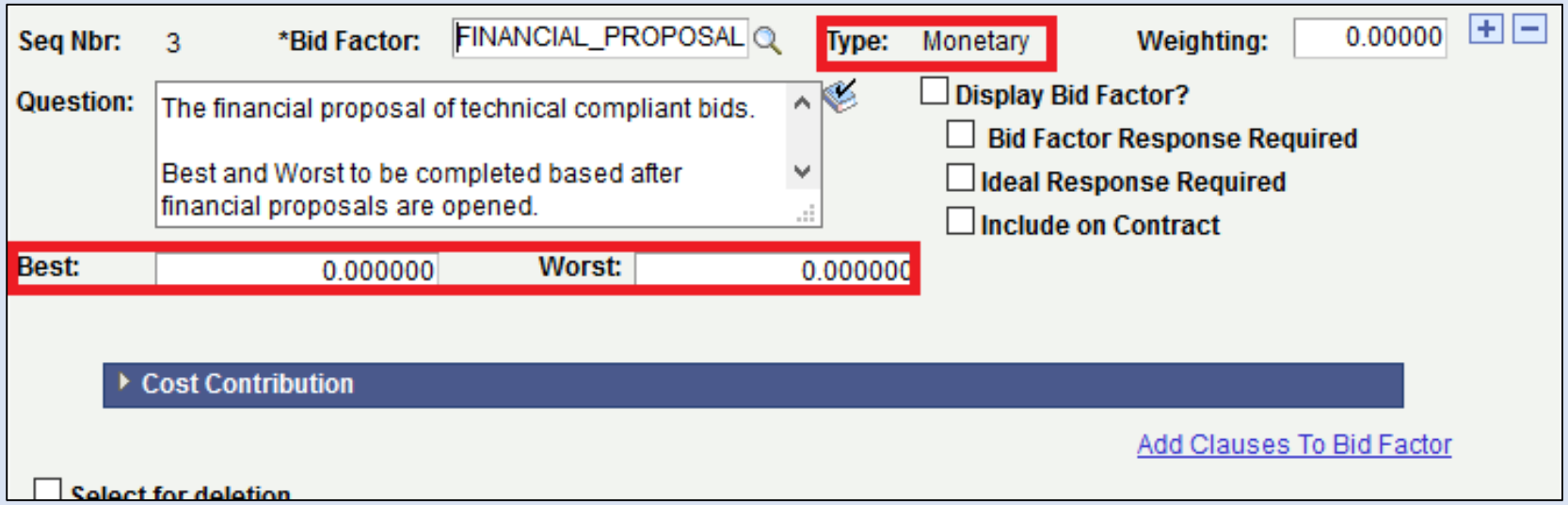


Click to return to Launch a Tender Main Page

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.

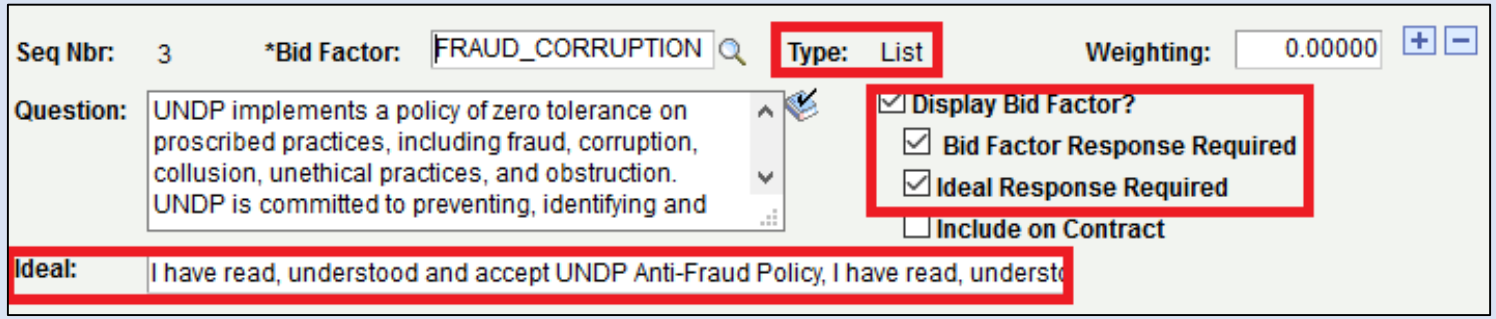


Click to return to Launch a Tender Main Page

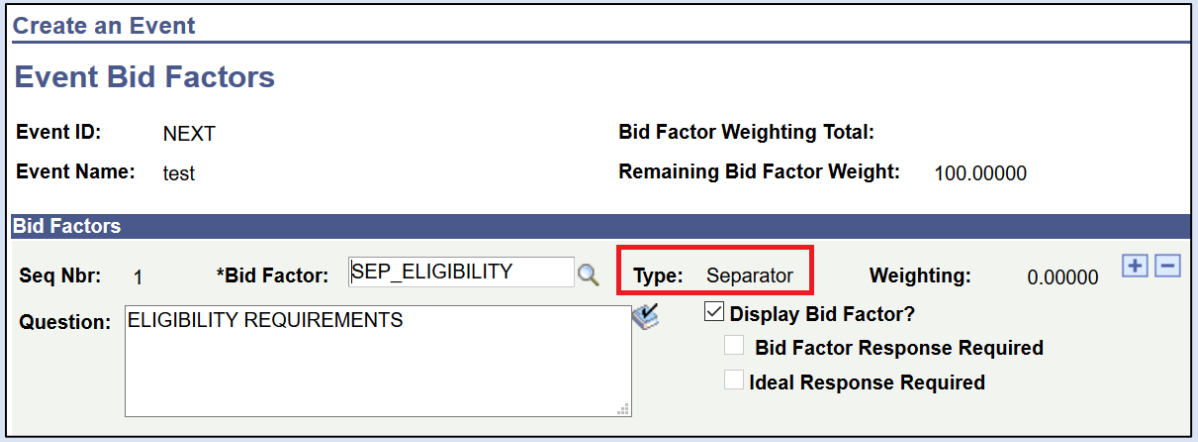
4.2 Create an Event – Event Header Bid Factors

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.*

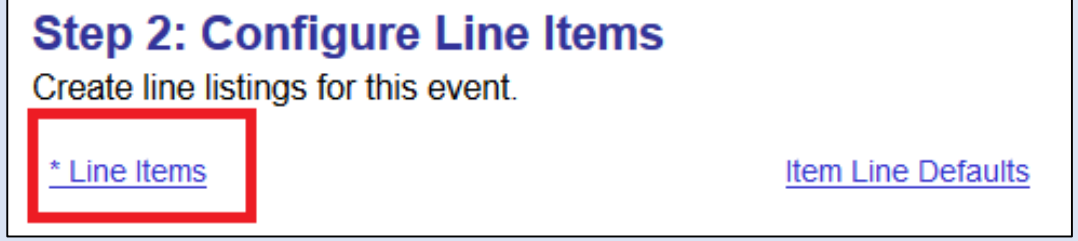


7. Separator – *This is not a question to bidders. It serves simply as a header level. Can be used to group the bid factors by category* It can be used to organize the questions, for example into sections of technical, general, and eligibility requirements.



Click to return to Launch a Tender Main Page

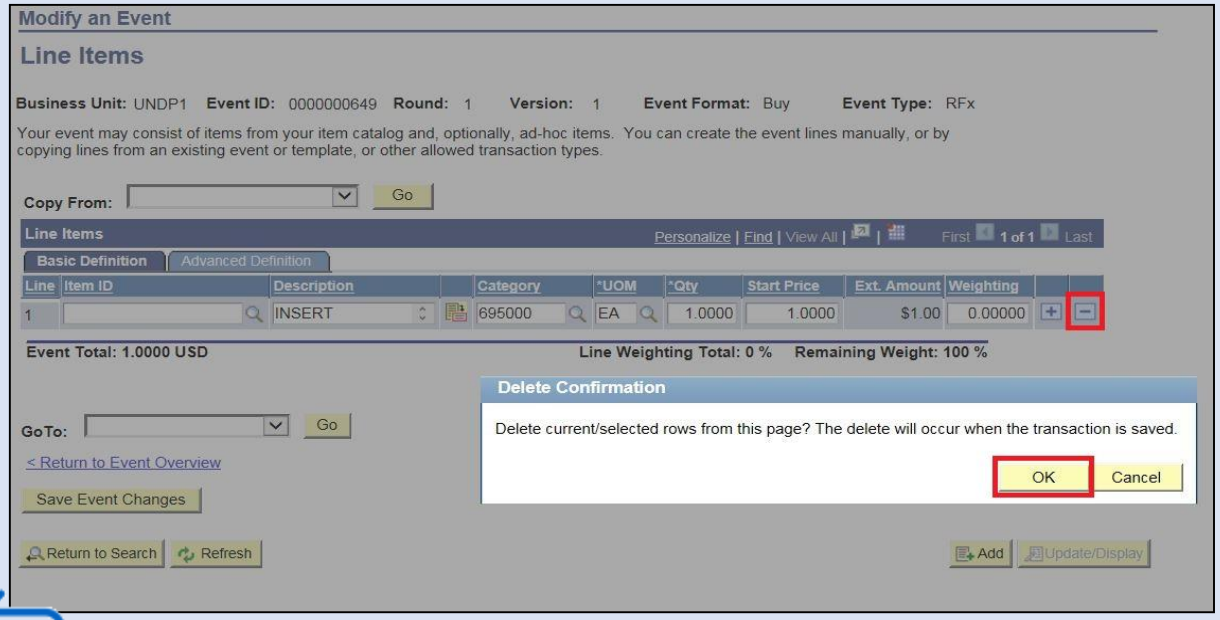
4.2 Create an Event – Configure Line Items



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***.

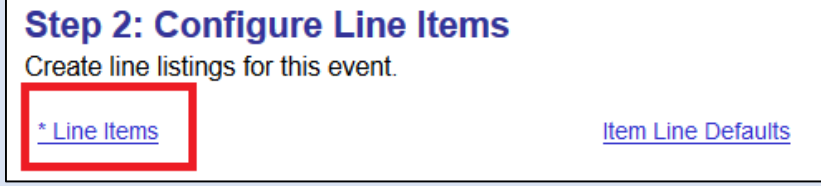
Delete the line item that was copied from the template by clicking on the minus sign, and then ***OK.***



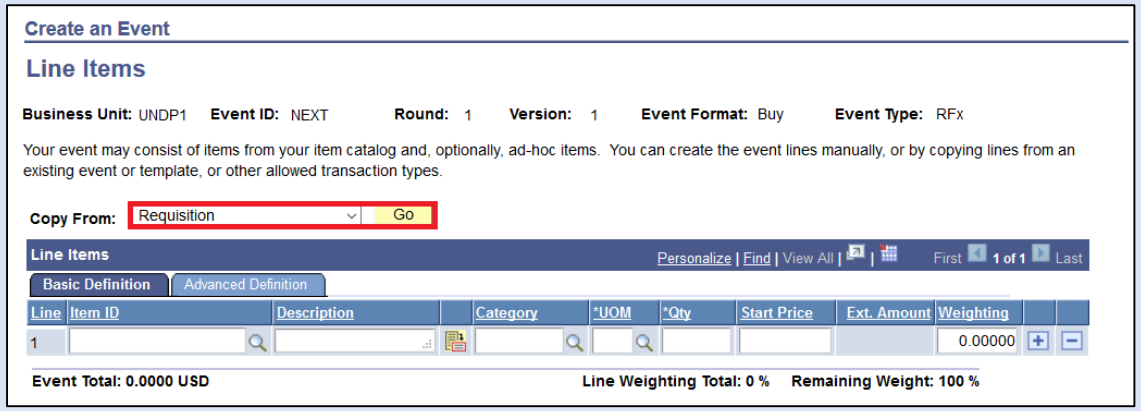
To add a line manually, insert the Item ID and quantity.

Click to return to Launch a Tender Main Page

4.2 Create an Event – Configure Line Items

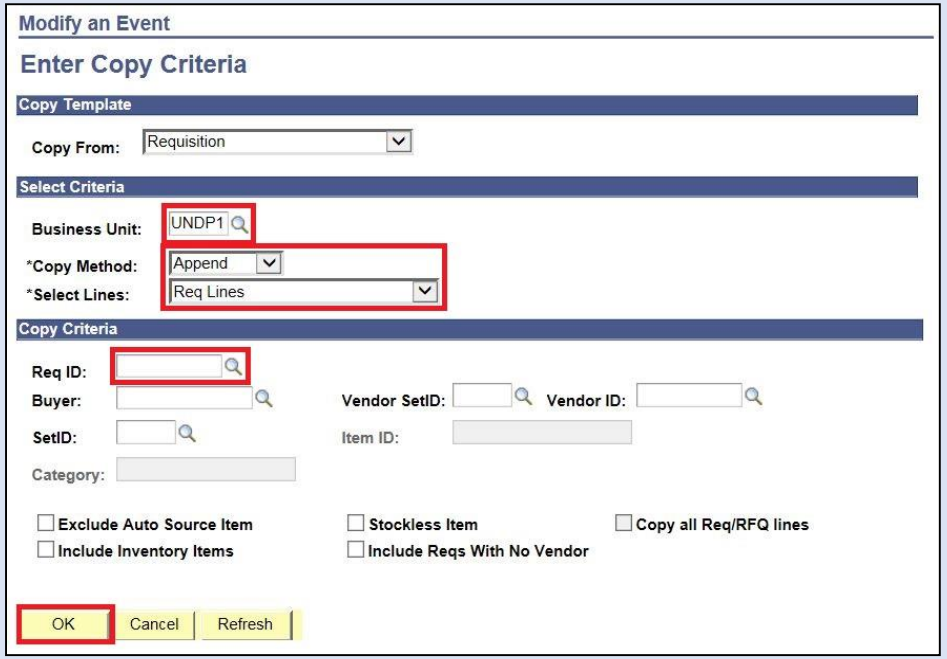


If you choose to copy a line from a requisition and later create the Purchase Order through eTendering, the requisition schedule will be automatically populated in the PO. To copy line items from a requisition, choose "***Copy From: Requisition"*** and press "***Go"***.



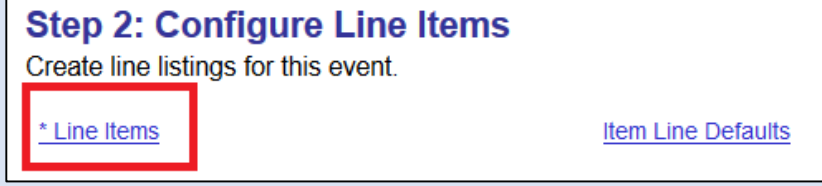
Please note: The start price is used as the requisition price, or the estimated budget price. It is **not visible to bidders** and will not impact the price bidders can bid or be awarded.

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***.

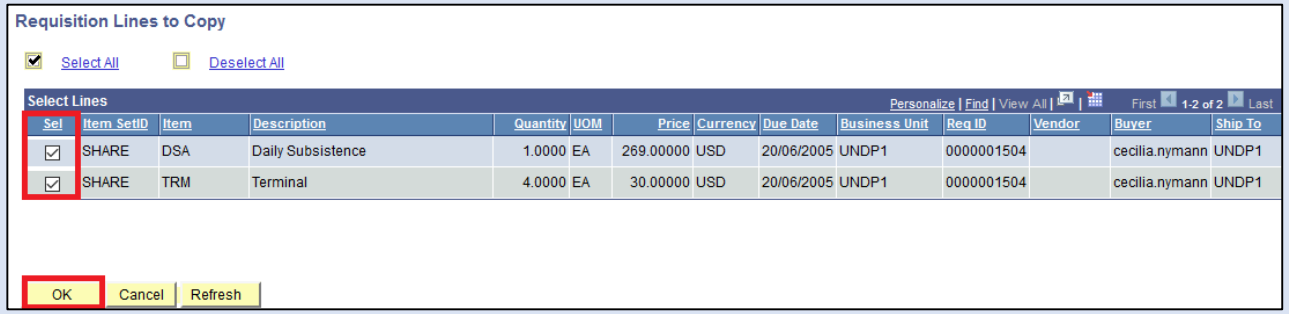


Click to return to Launch a Tender Main Page

4.2 Create an Event – Configure Line Items



Select the lines to copy and press "***OK***".



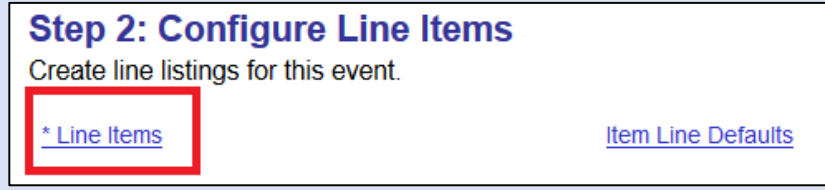
Please note: It is possible to select and source specific requisition lines and to combine lines from different requisitions. Once a line has been sourced into an event, it is not possible to source it to another event unless the line is deleted from the event it was already sourced to.

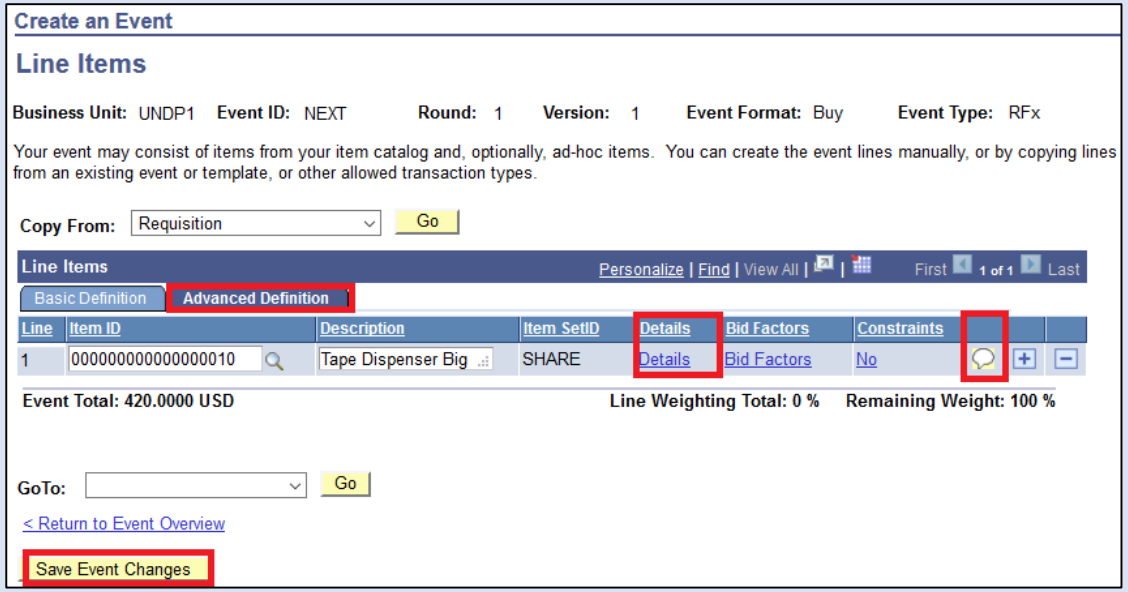
When adding line items, please consider the following:

- **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





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 

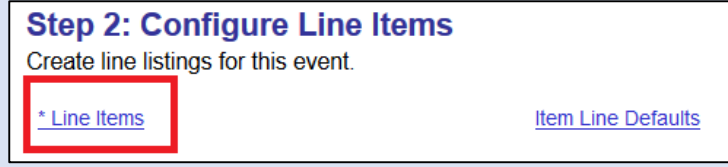
To add information on the ***Due Date***, ***Incoterms, Ship To or Freight Terms for the individual lines***, click on "***Details***". If the details are the same for all line items, enter them through "***Line Items Default***" at the main event page.

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.

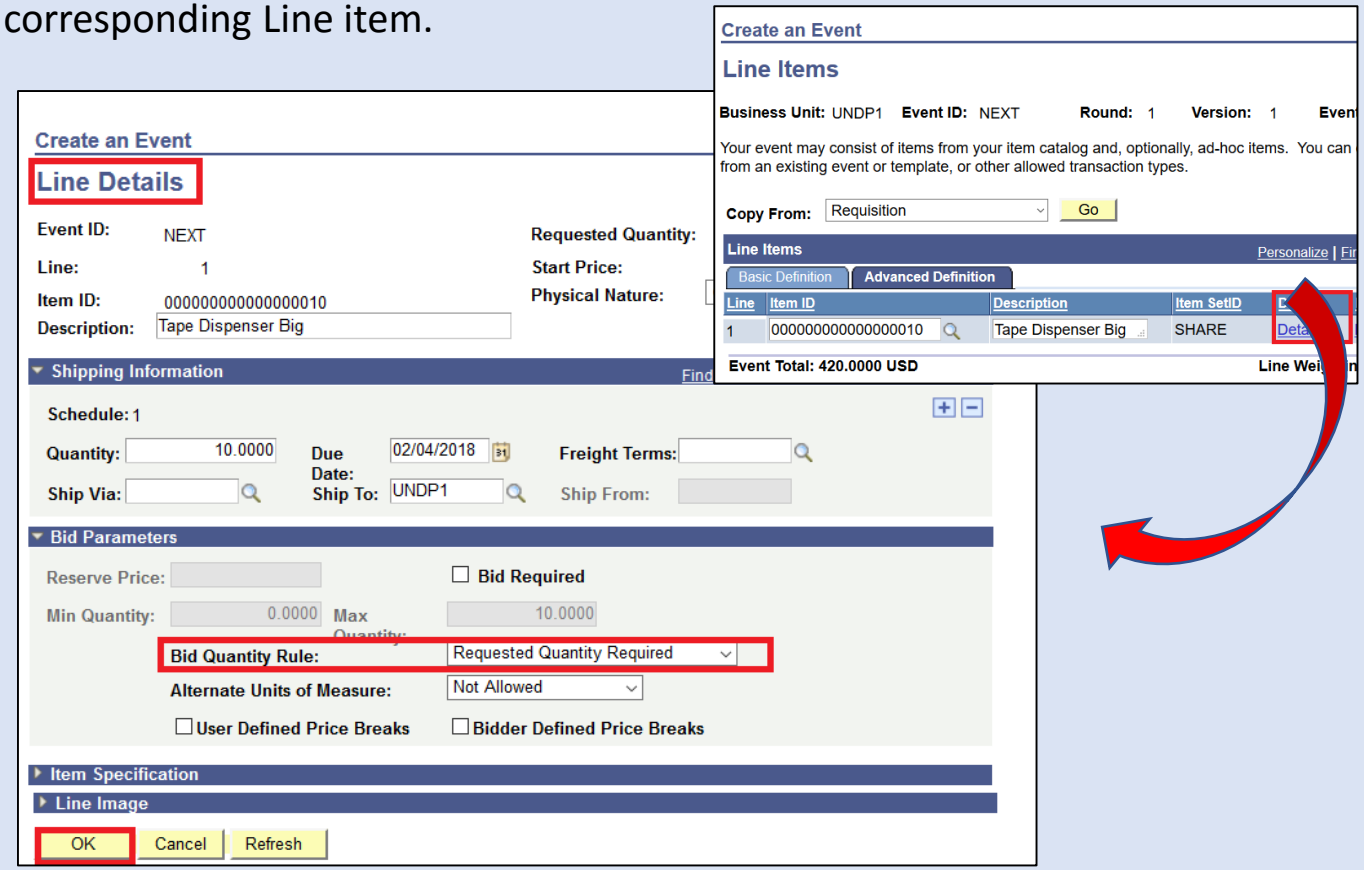
Please note: Do not use the line comments for detailed item specifications as it will be cumbersome for bidders. Instead, it is recommended to consolidate the requirements and specifications for all items in one document and provide it as an attachment to the solicitation document..

Click to return to Launch a Tender Main Page

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.



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.

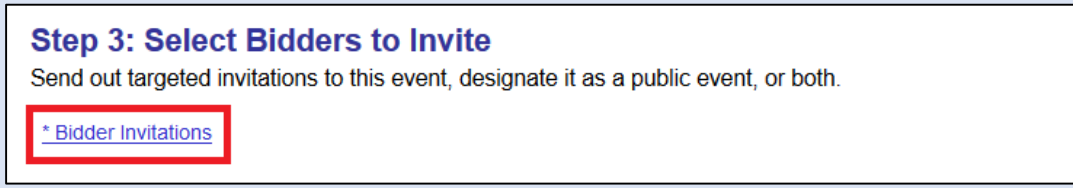
Always check the settings on this page, particularly when copying from an eRequisition as this may in some instances, have overridden the eTendering settings. For example, check if **"bid required"** box is checked, and whether min quantity and max quantity are correct, etc.

When all selections are completed, click on ***"OK"***.

Click to return to Launch a Tender Main Page

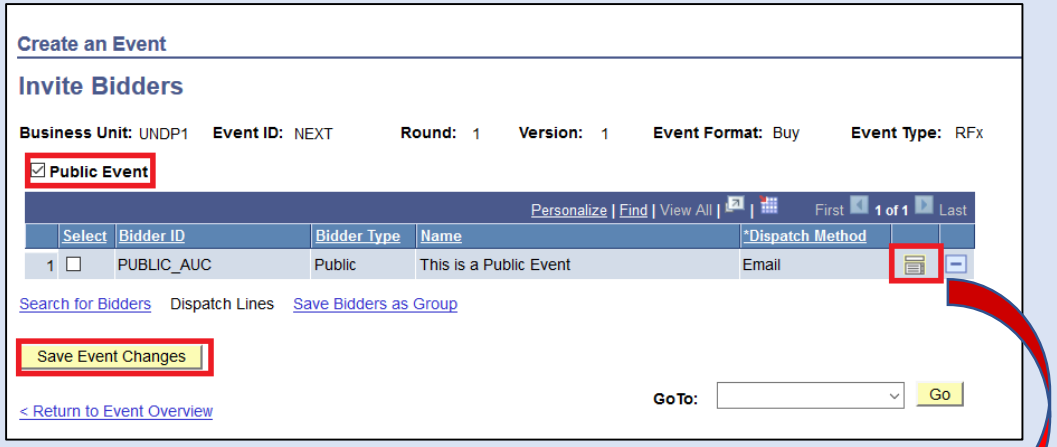
4.2 Create an Event: Invite Bidders

For the next step, click on "***Bidder Invitations***"



For Open Competitions

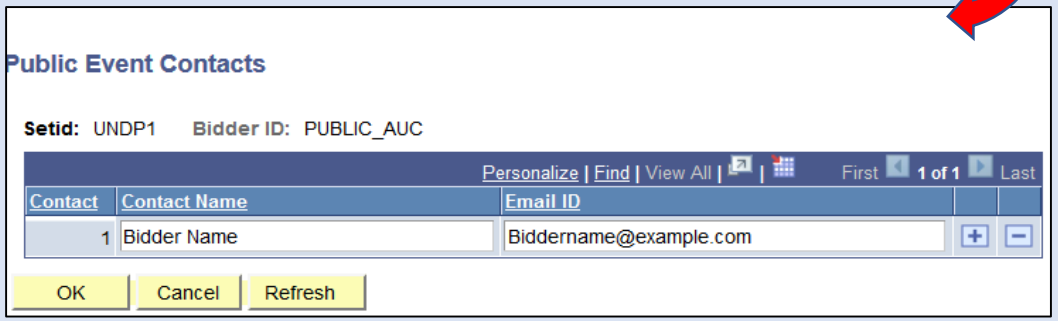
If the solicitation is an **open competition**, make sure that the box titled "***Public Event***" is checked. This will ensure that all bidders who are registered with eTendering will be able to view and bid on the event.



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.



Click to return to Launch a Tender Main Page

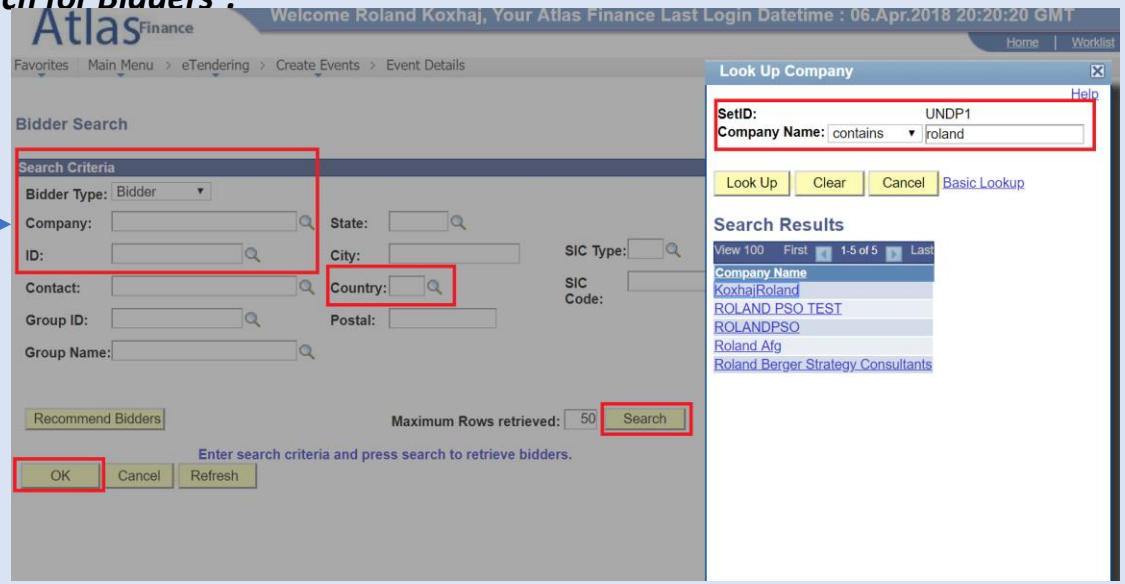
4.2 Create an Event: Invite Bidders for Limited Competition

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.

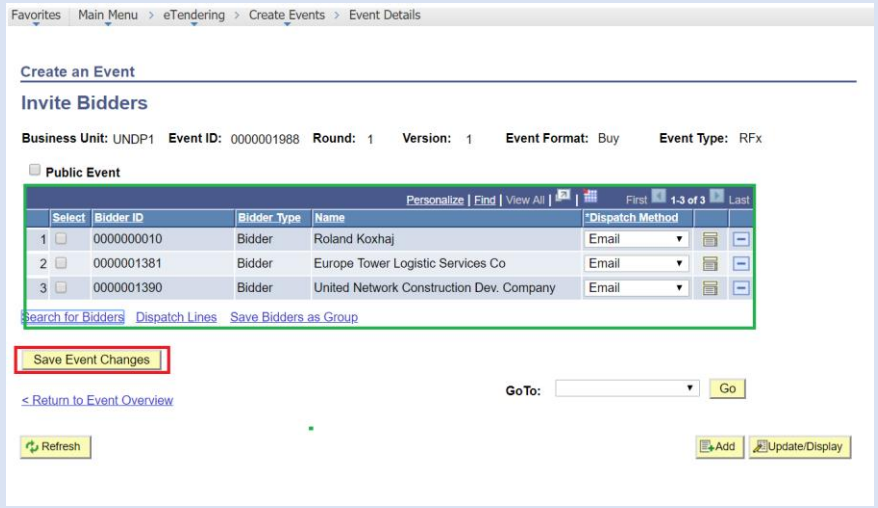


Select the bidder you would like to invite to the event and press "***Search".*** Tick the box named ***"Invite"*** for the appropriate vendor and click "***OK".***

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".***





Click to return to Launch a Tender Main Page

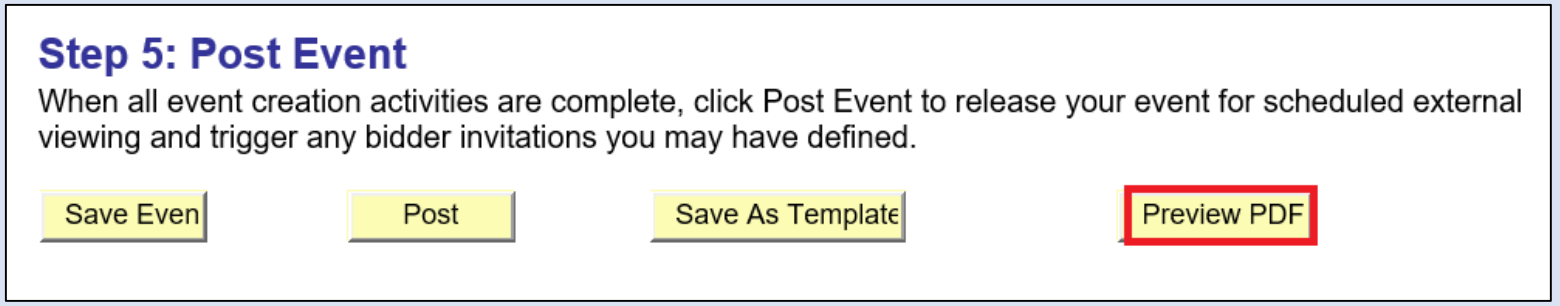
4.2 Create an Event – Invite Collaborators (Optional)



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.



FAQ

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.

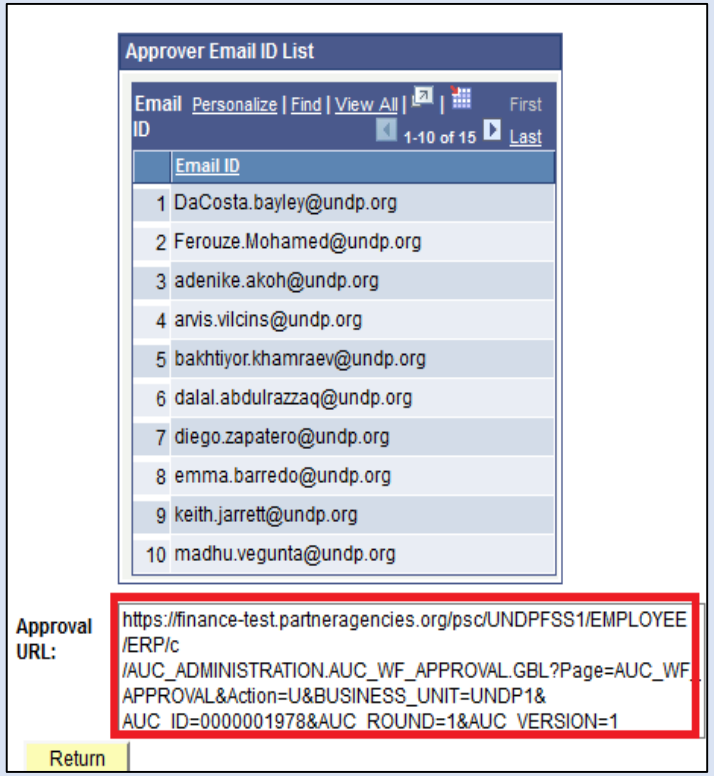


Remember to save your event as you complete each step and before posting for approval

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.

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.***

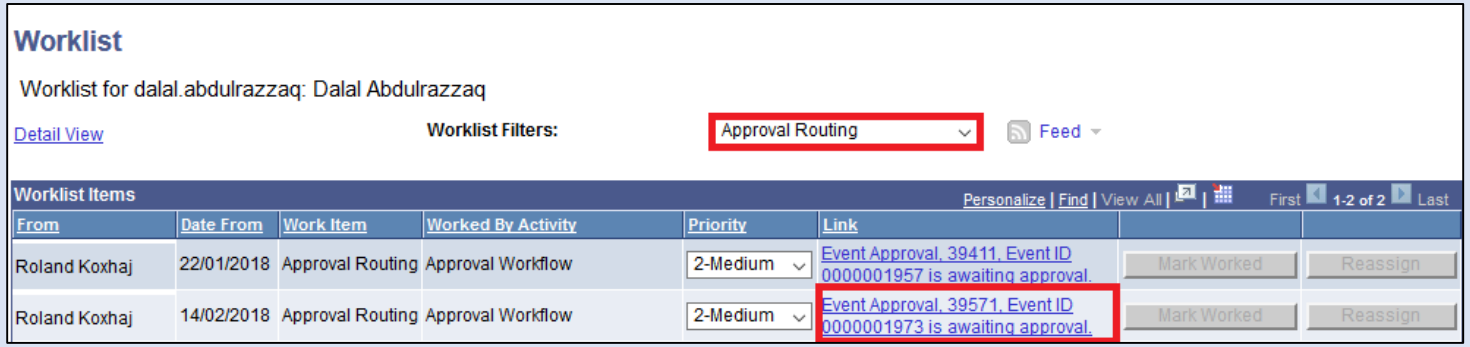


It is possible to copy and paste the ***Approval URL*** that appears after clicking ***Approver List*** onto an email to share the link to approve an event directly with the approvers.

Click to return to Launch a Tender Main Page

4.3 Approval of events and amendments

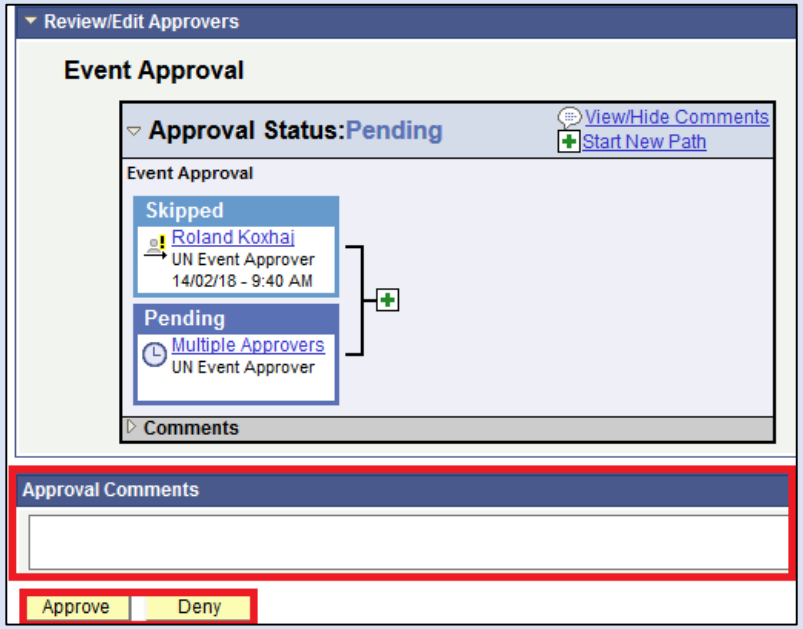
Once an event is posted by the buyer, the event approvers will receive an email requiring their approval. Click on the email hyperlink to go the approval page. Alternatively, the approval page can be accessed by navigating **to *Main Menu* → *Worklist* → *Worklist*** and select ***Worklist Filters: Approval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



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.

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.

FAQ

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.

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.

Click to return to Launch a Tender Main Page

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.



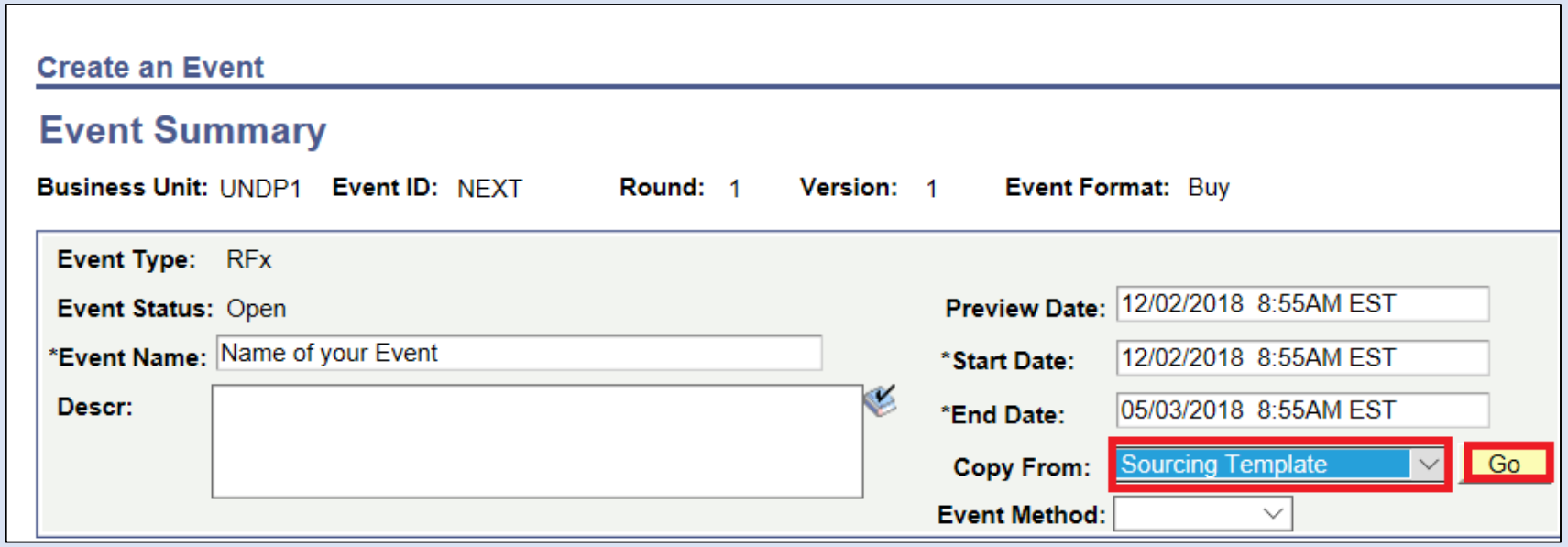


Click to return to Launch a Tender Main Page

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”***.



Click to return to Launch a Tender Main Page

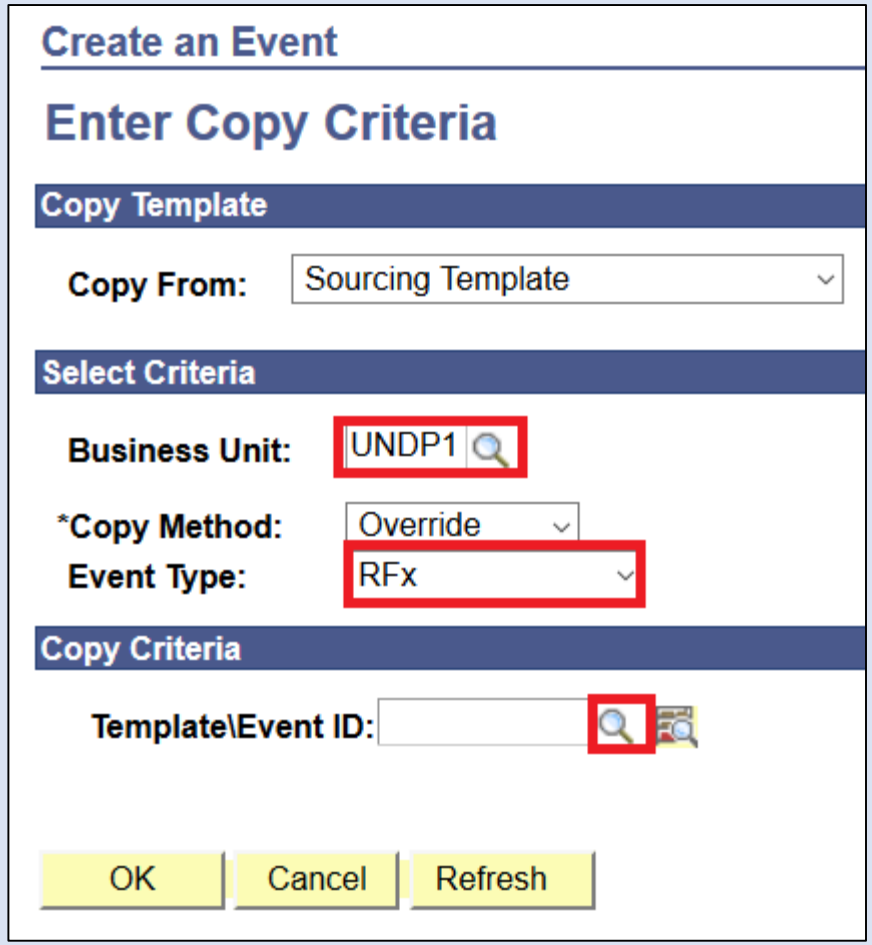
4.5 Create an Event from a Template

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"***

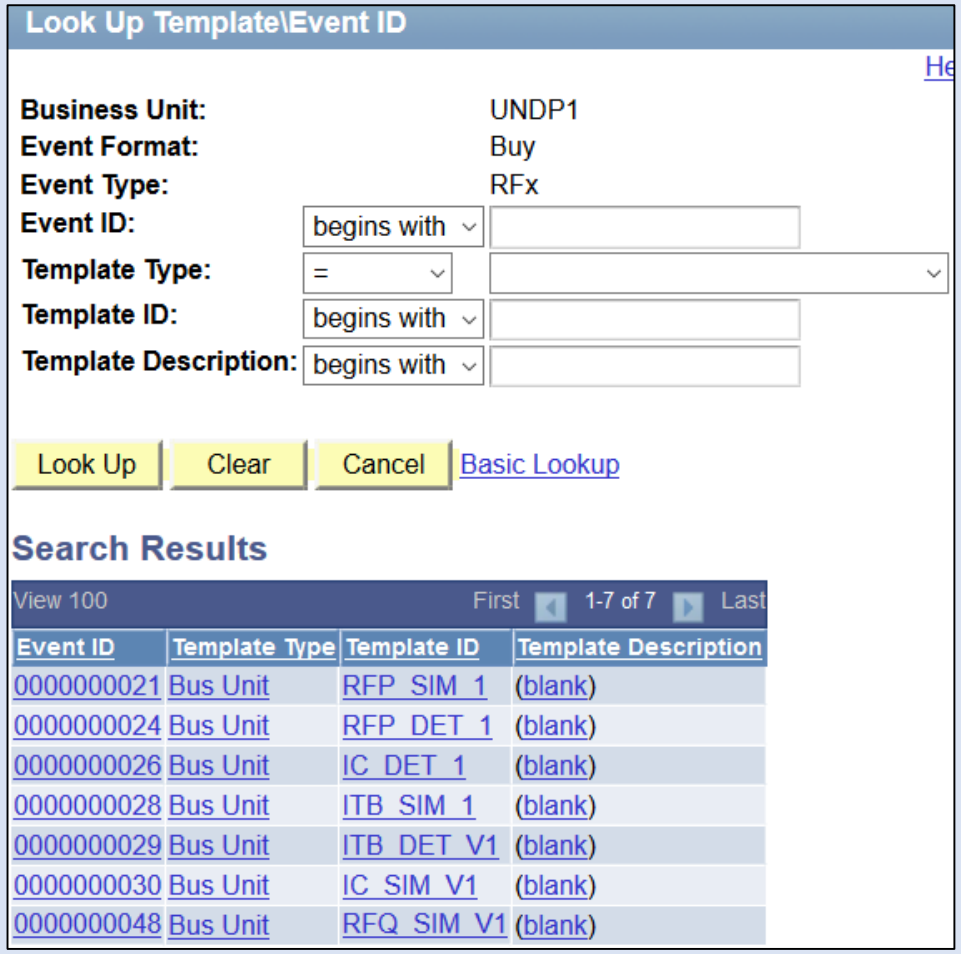
Click on the magnifying glass to search and view available templates.



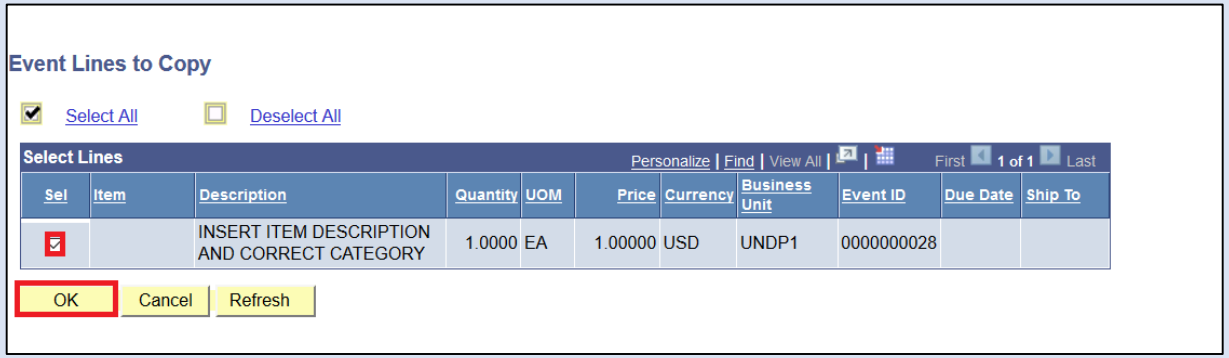
Click to return to Launch a Tender Main Page

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**.**



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"***.

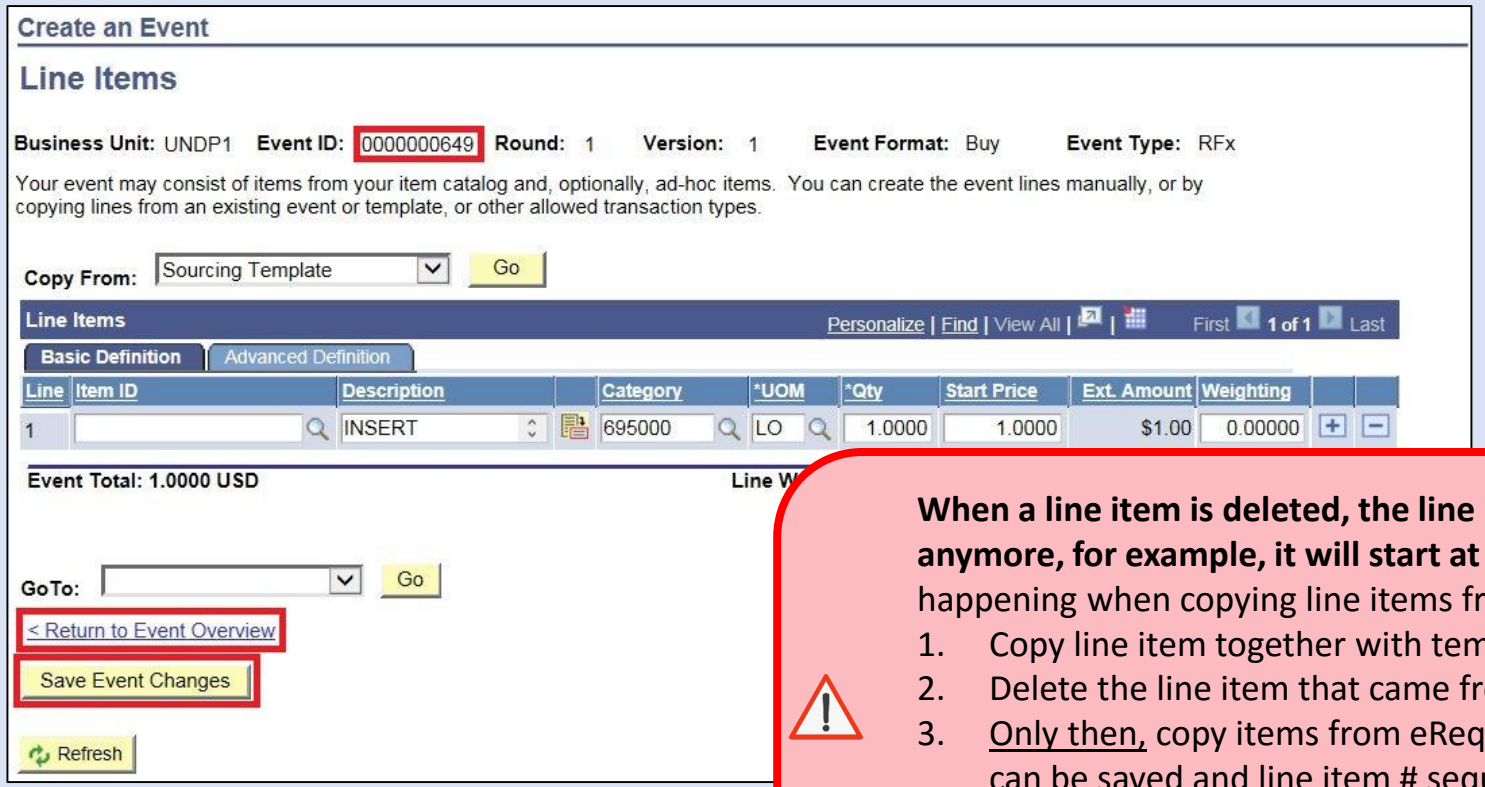


Click to return to Launch a Tender Main Page

4.5 Create an Event from a Template

5

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



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.

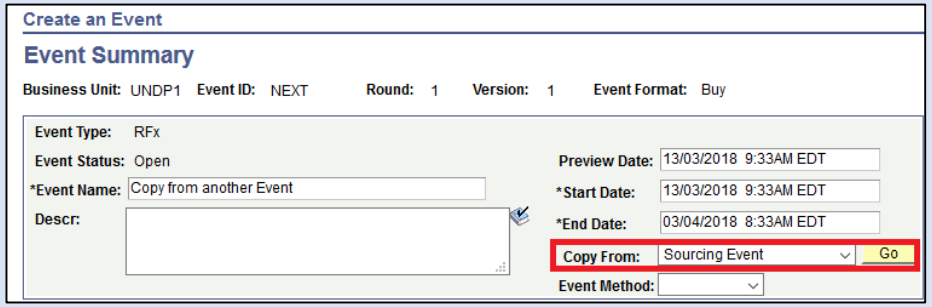
To delete a line item, click on the **minus sign** to the right side of the line item.
To add a line item, click on the **plus sign.**

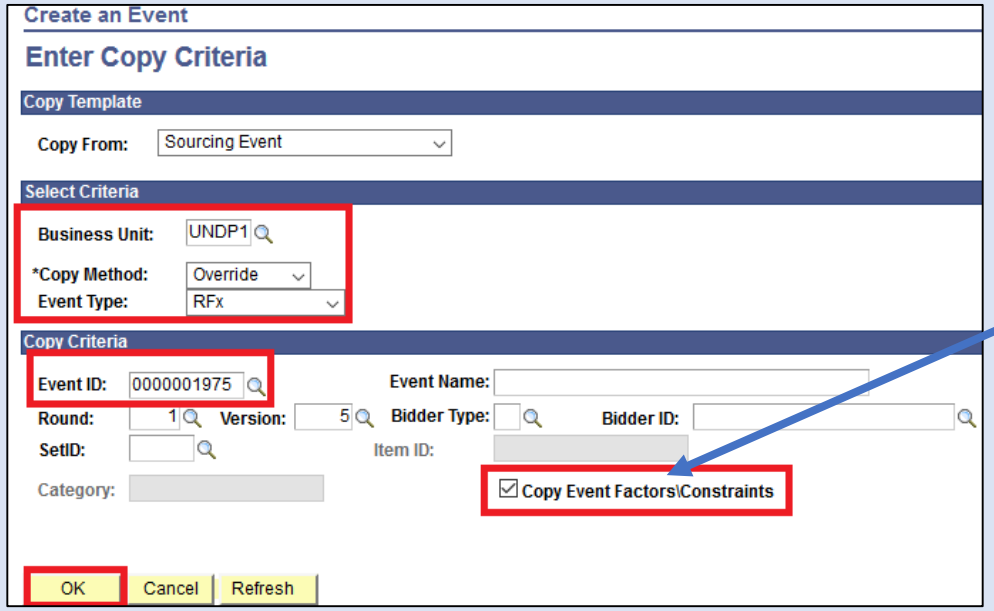
Click to return to Launch a Tender Main Page

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.





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

Click to return to Launch a Tender Main Page

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.

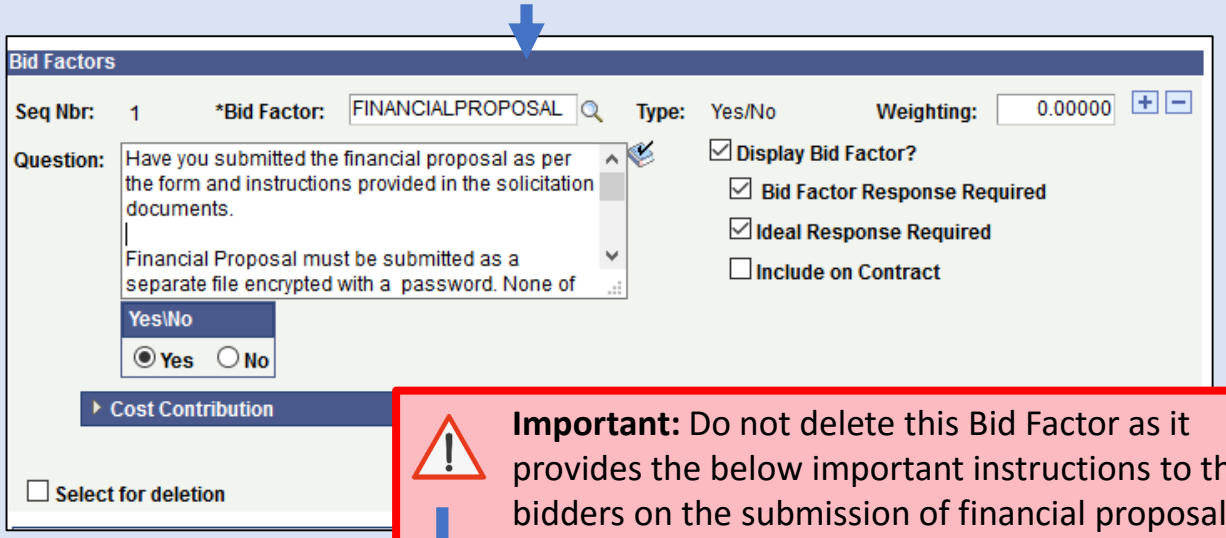
When an RFP process is managed through eTendering bidders are instructed to **submit their financial proposal as a password protected PDF uploaded in the system, and in the system they must insert “1” in the line item unit price.**

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:



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

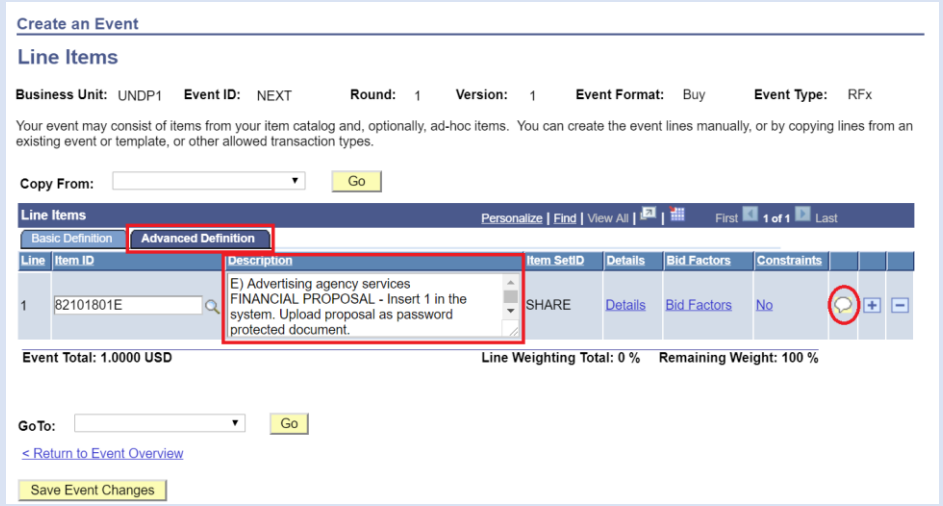
Have you submitted the financial proposal as per the form and instructions provided in the solicitation documents.

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.

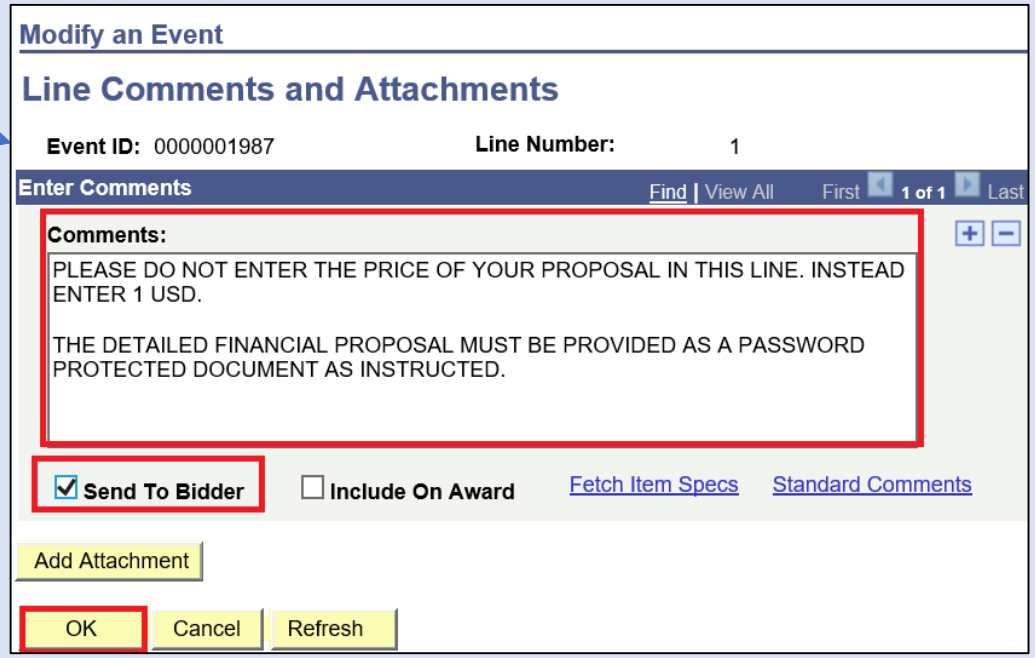
DO NOT DISCLOSE YOUR PRICE IN THE LINE ITEMS. YOU MUST PUT PRICE AS 1 IN AND PROVIDE THE FINANCIAL PROPOSAL AS ENCRYPTED FILE.

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.

Click to return to Launch a Tender Main Page

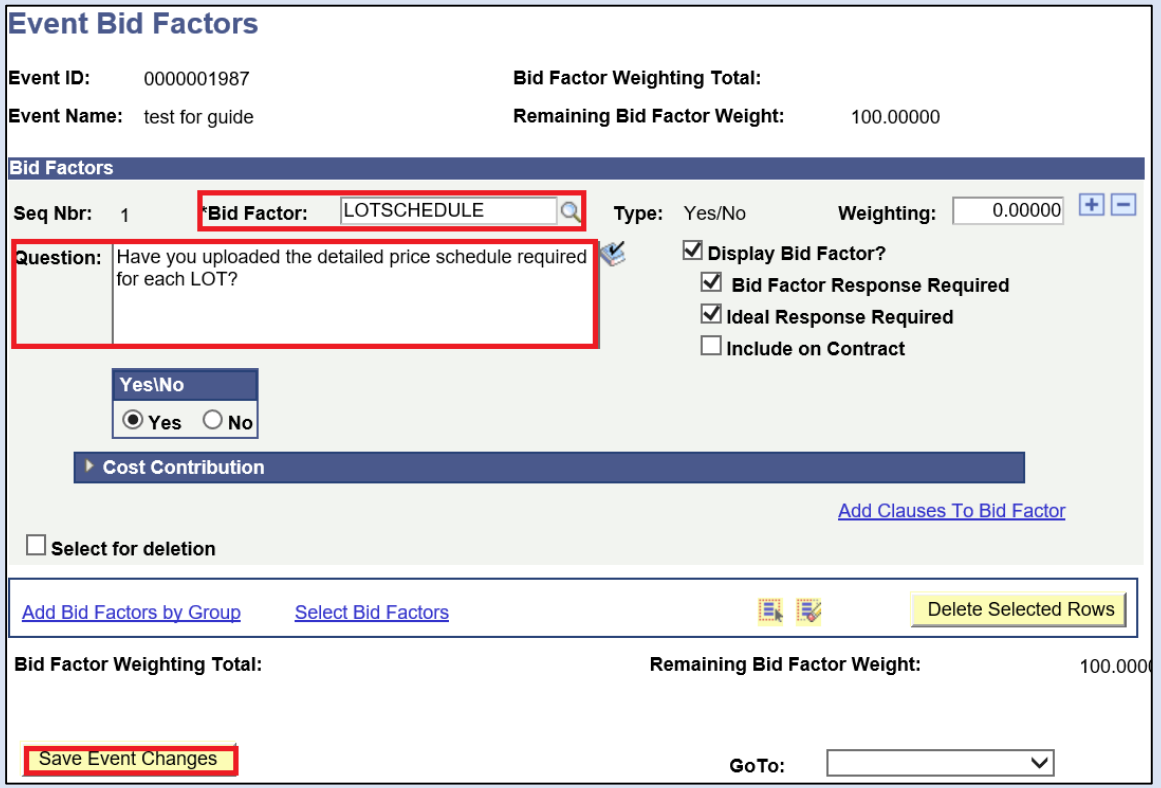
4.8 Create an Event for ITBs with LOTs – Price schedules

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.***

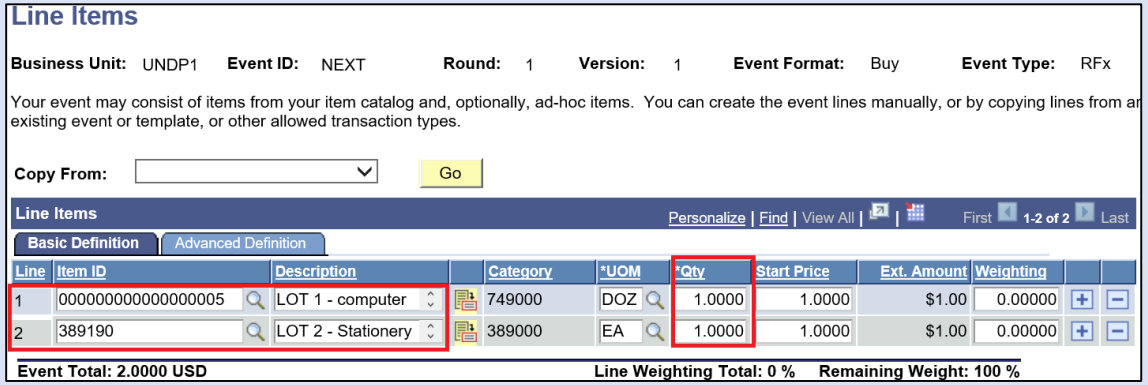
⚠ Please note that the public bid opening is slightly differently for LOT event. Go here for more information.



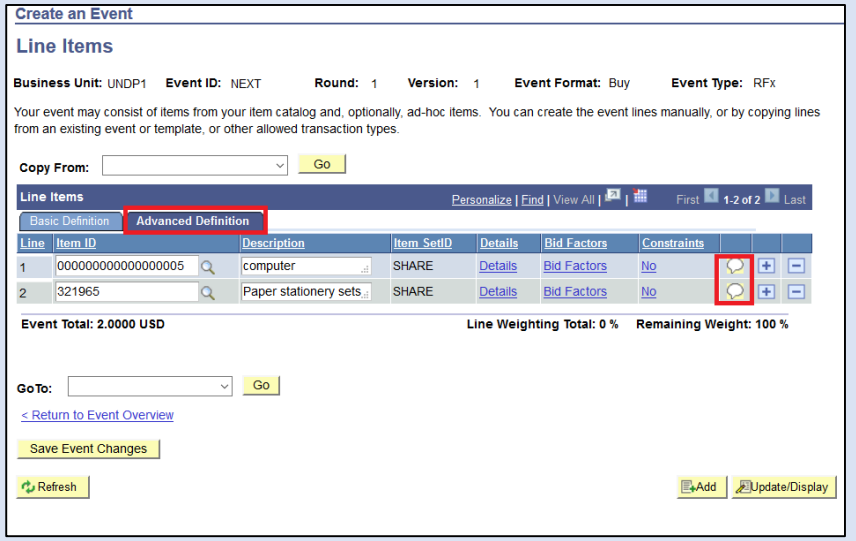
Click to return to Launch a Tender Main Page

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

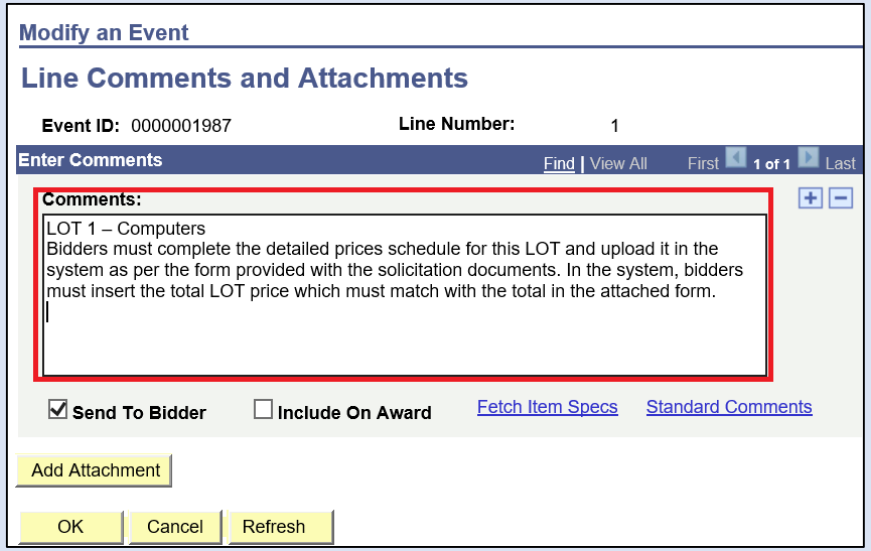
1) When configuring line items for a LOT event at **Step 2 of event creation**, you must add one Line Item per LOT and then enter the quantity for each line item as 1. Search and select the Line item ID that corresponds to the LOT by clicking on the magnifying glass. Thereafter, enter the start price and click on "**Save Event Changes".**



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**.



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

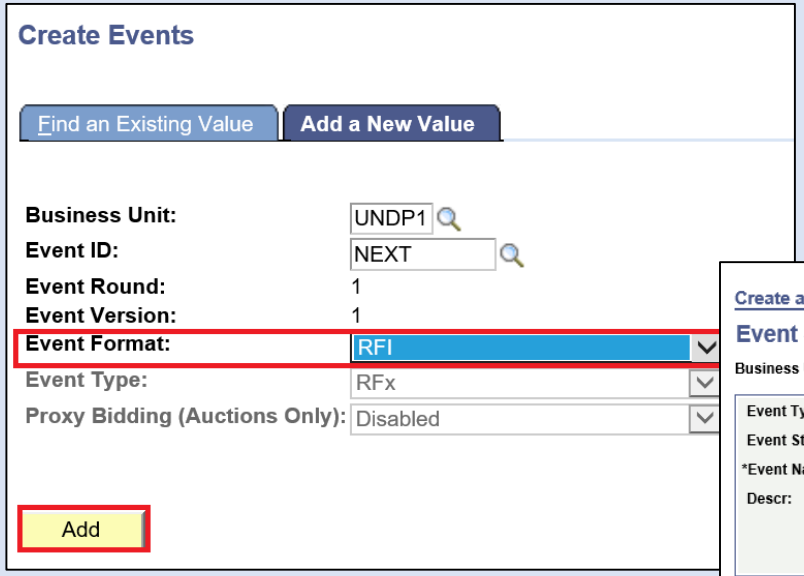


Click to return to Launch a Tender Main Page

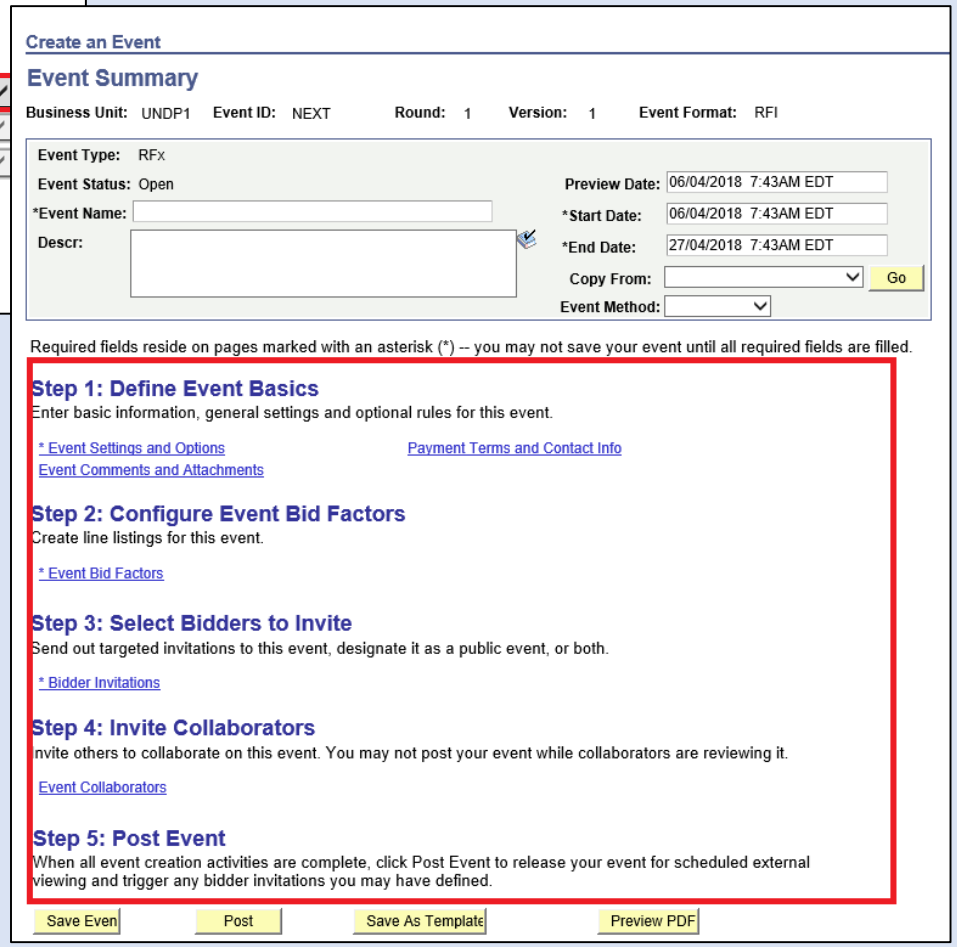
4.9 Create an event for Request for Information (RFI), Expression of Interest (EOI) and Prequalification of vendors

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



No Line Items required



Click to return to Launch a Tender Main Page

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.

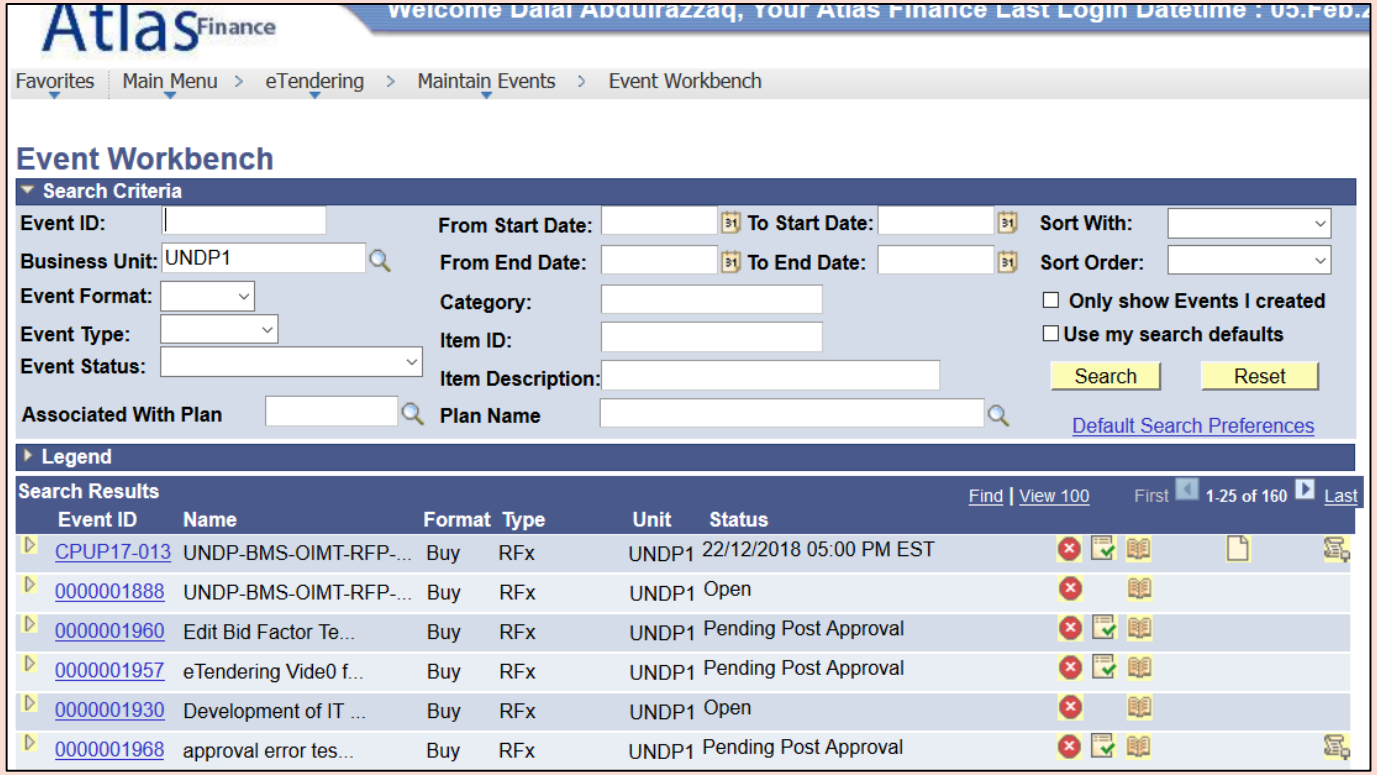
5.1 Access Event Workbench
5.2 Search for events in the system
5.3 Make an amendment to an on-going tender.
5.4 How to make changes to line items and Bid factors (Important)
5.5 Updating Event Attachments
5.6 View approval status of an event
5.7 View Bidder participation history
5.8 View event history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





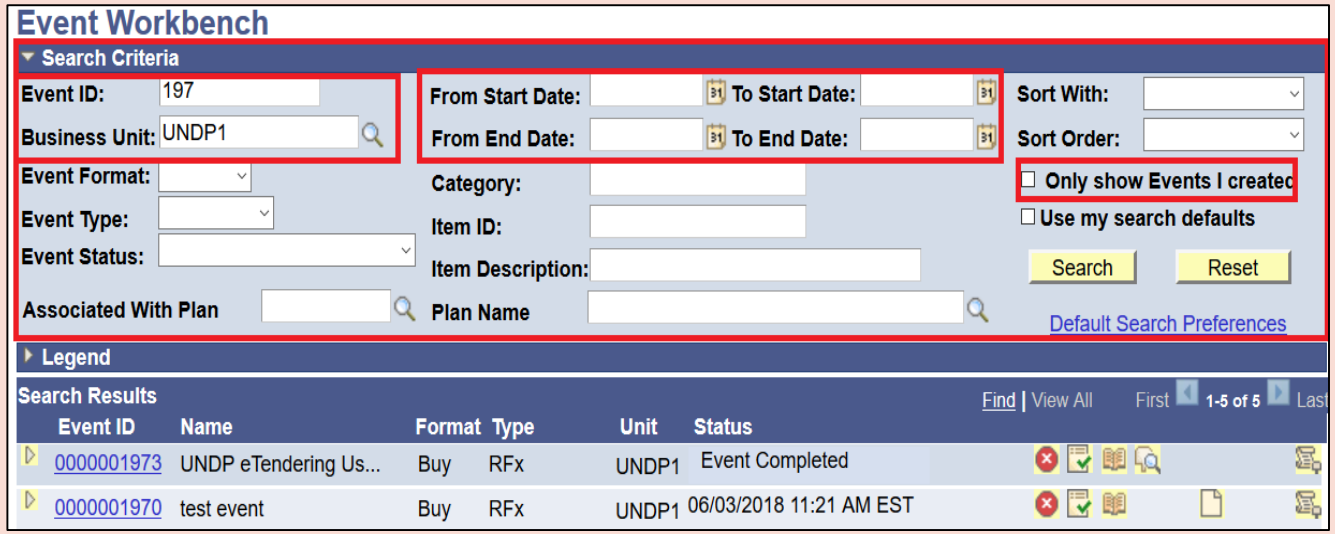
Click to return to Manage Events main section

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.

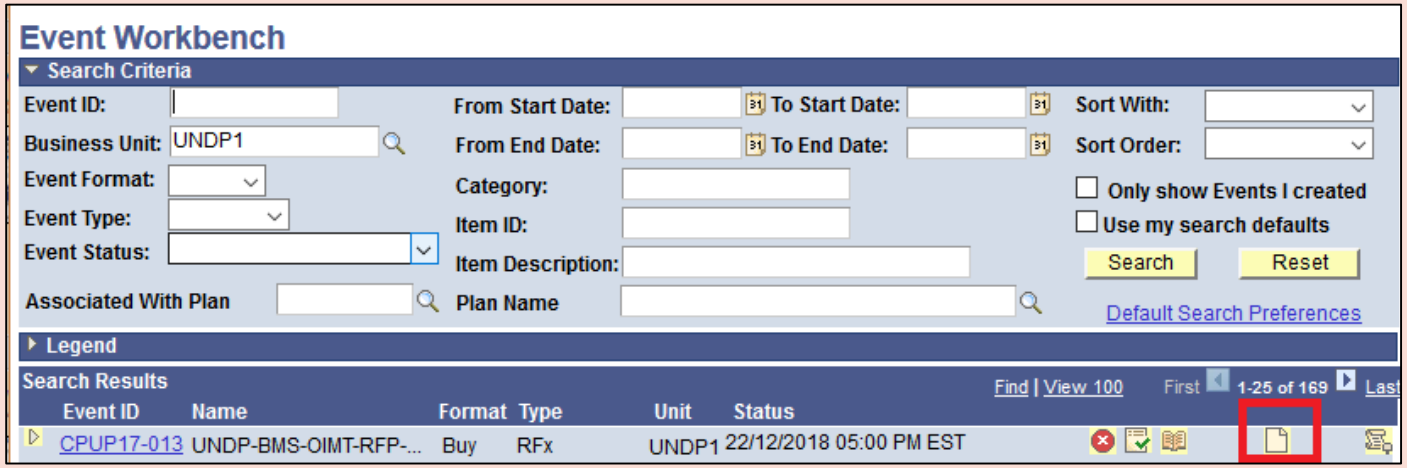


Please note It is important to filter to the correct event to avoid accidentally making changes to other events.

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.*



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***

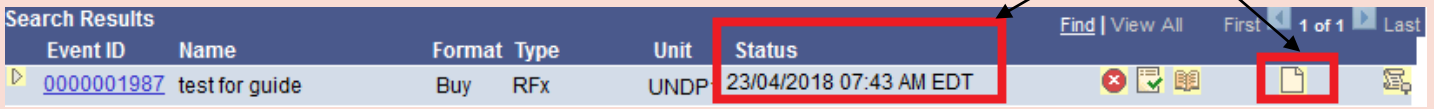
Click to return to Manage Events main section

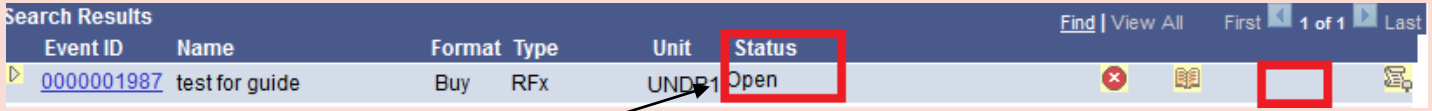
5.3 Make Amendments to an Ongoing Event

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**.

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





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.

Click to return to Manage Events main section

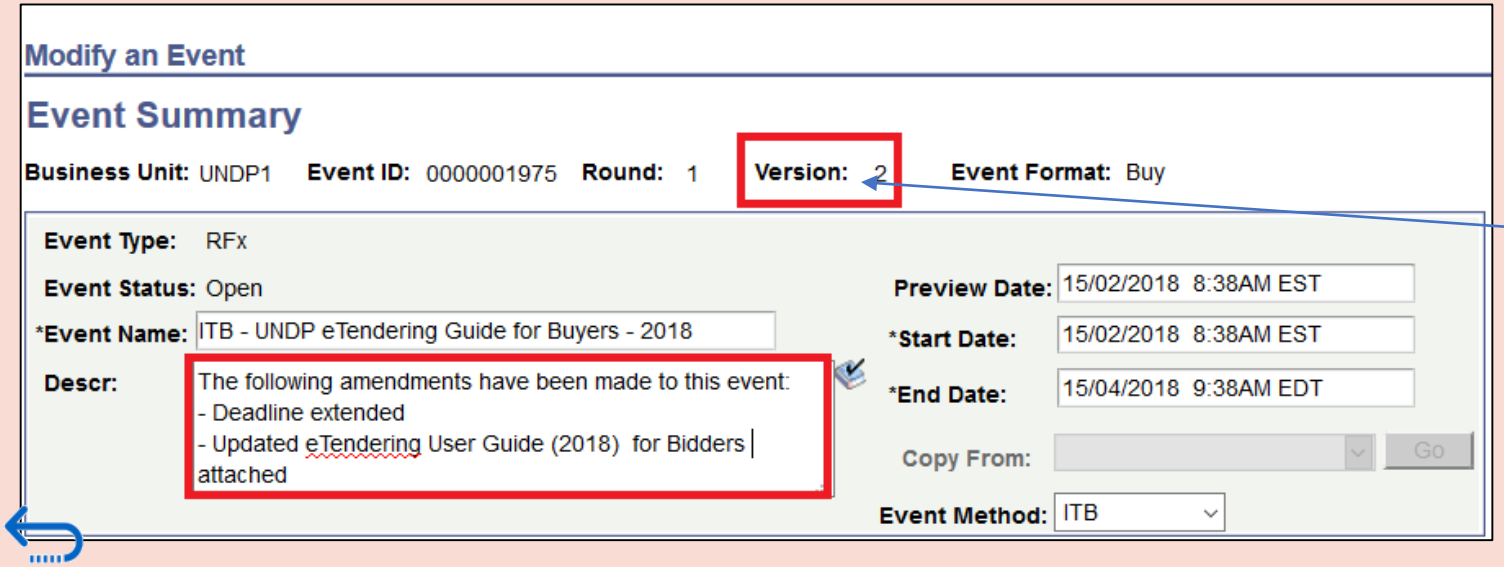
5.3 Make Amendments to an Ongoing Event

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.**



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



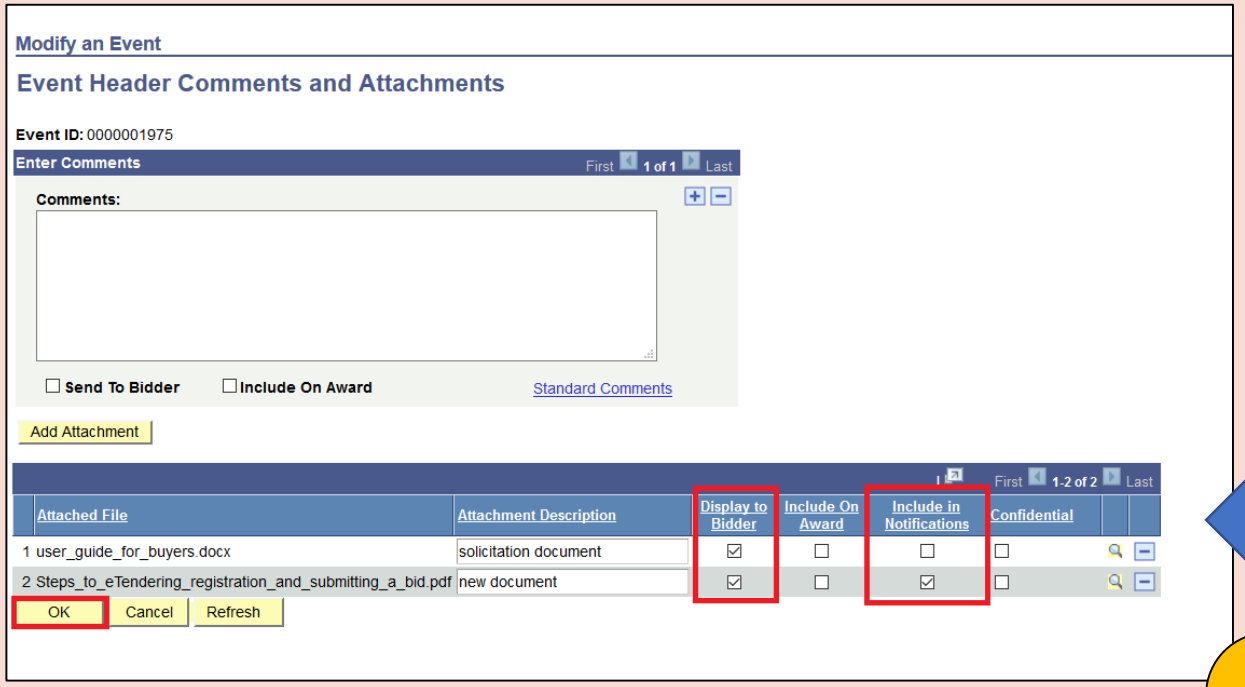
Important: If manager denies approval of these changes, it is recommended that buyer cancels the version with these changes to avoid that such changes are mistakenly applied in a later version.

Click to return to Manage Events main section

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.



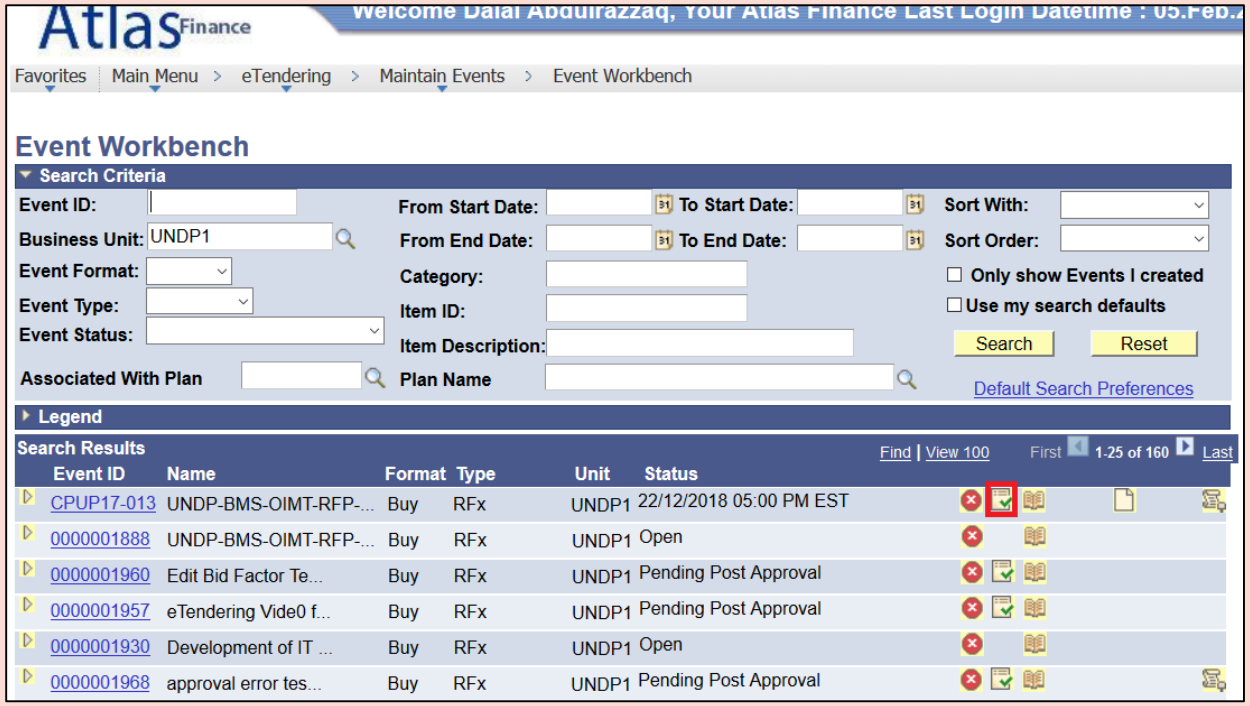
All attachments with the "***Include in Notifications***" box checked will be included in automatic notifications to bidders when the amended event is posted. It is recommended to untick "***Include in Notifications***" for all attachments that were attached in the old version and only tick the box for 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.

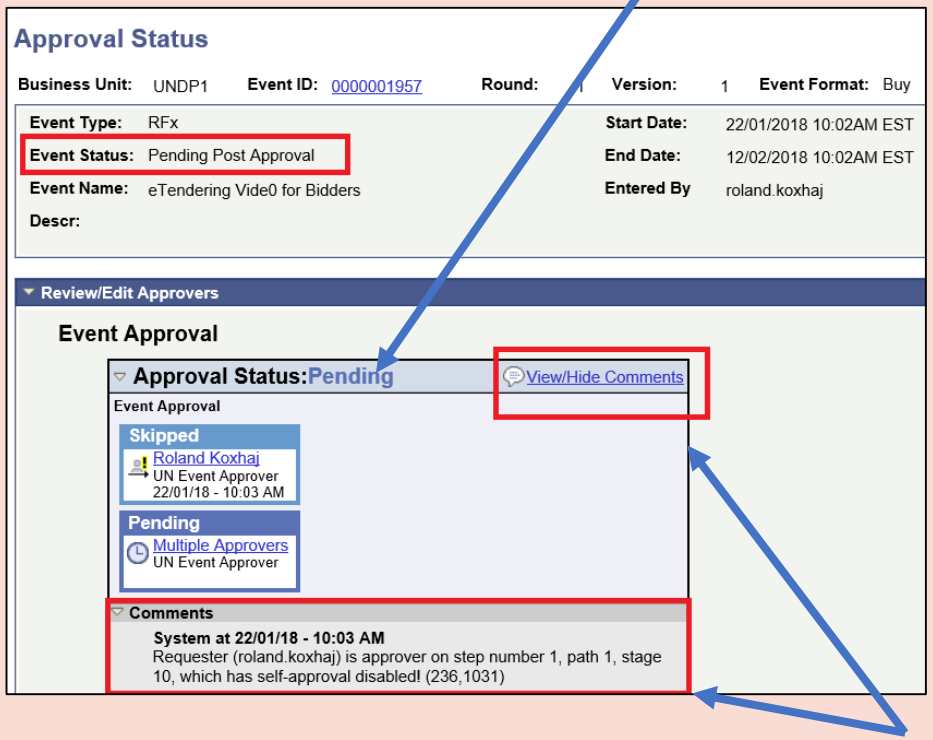
Click to return to Manage Events main section

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.



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

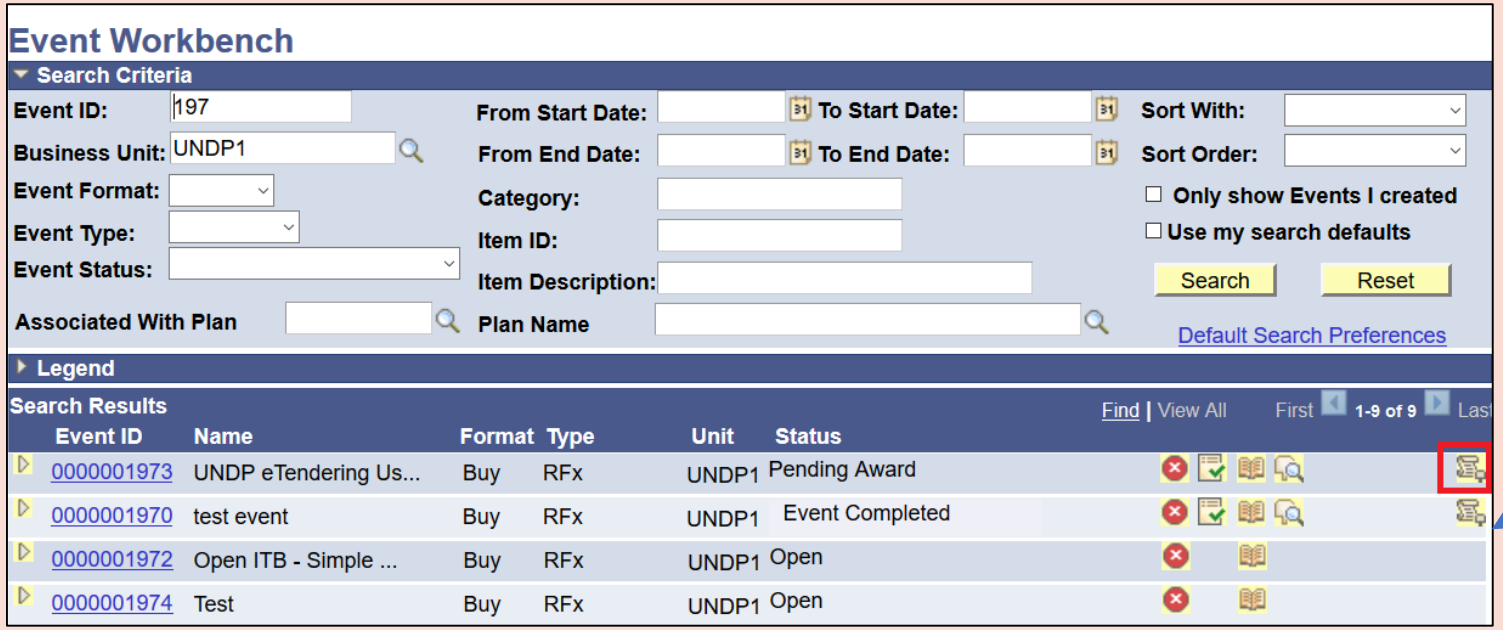


To check for any comments entered by the approver, click on the "***View/Hide Comments***" hyperlink with the bubble icon next to it.

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.*



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*.**

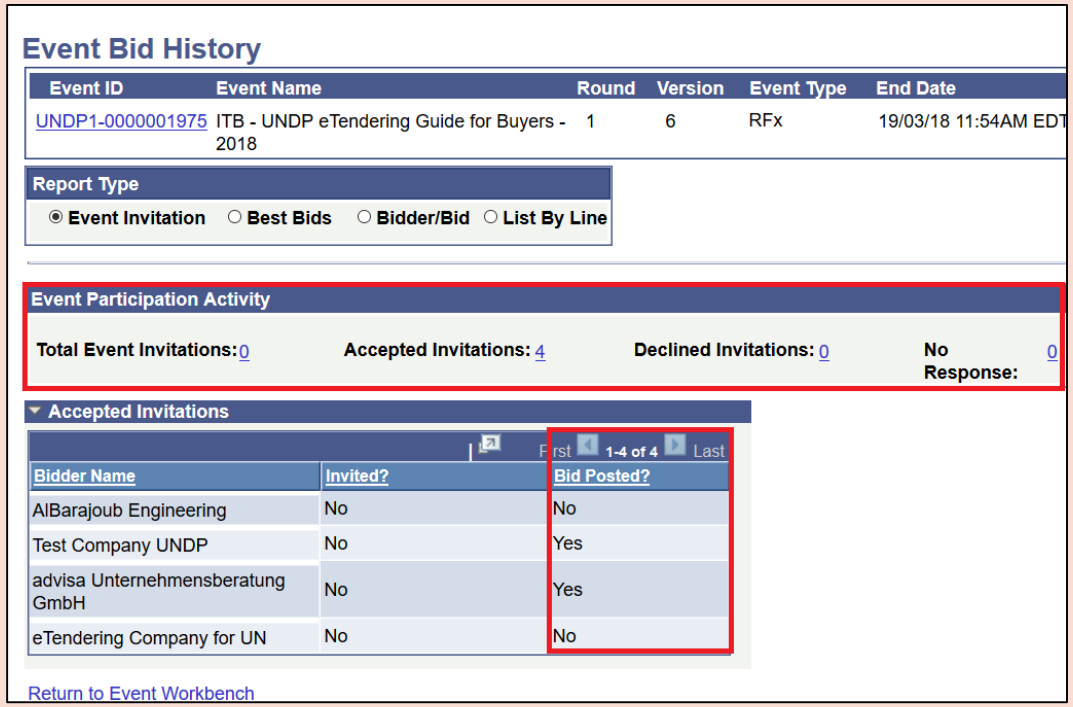
Click to return to Manage Events main section

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







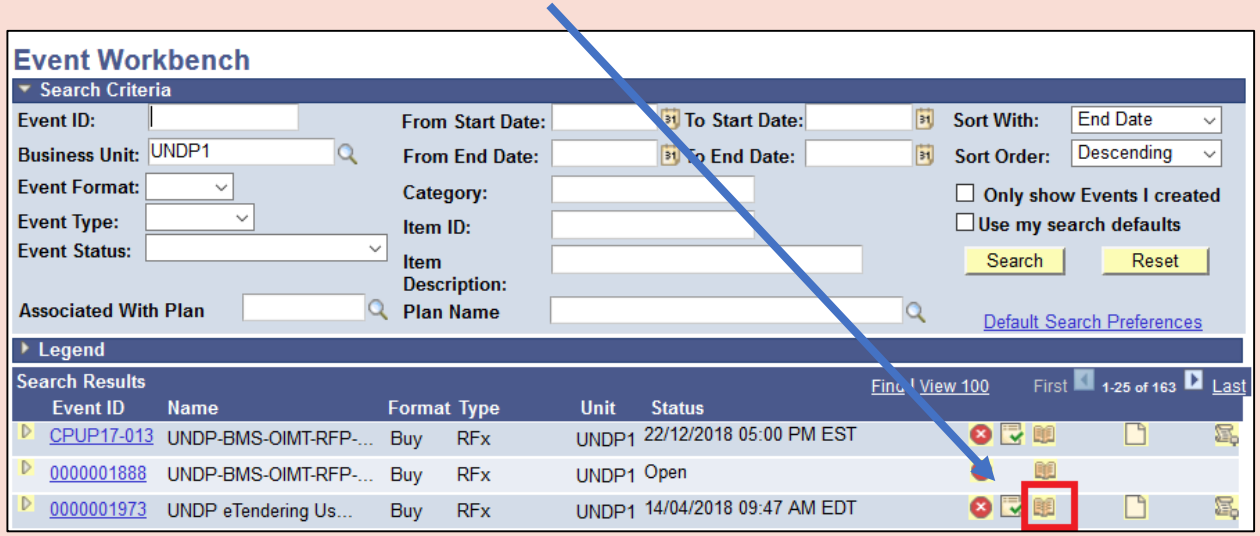
It is highly recommended that the buyer checks that there is sufficient participation during the solicitation period to ensure a timely deadline extension, if necessary.



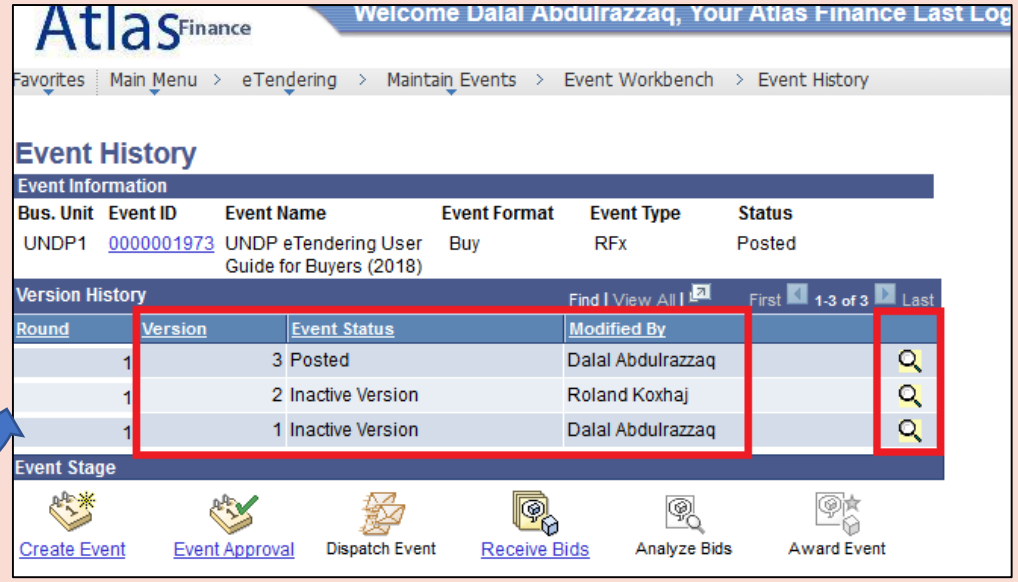
Click to return to Manage Events main section

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.*



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



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

Click to return to Manage Events main section

5.8 View Event History & Different Statuses

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

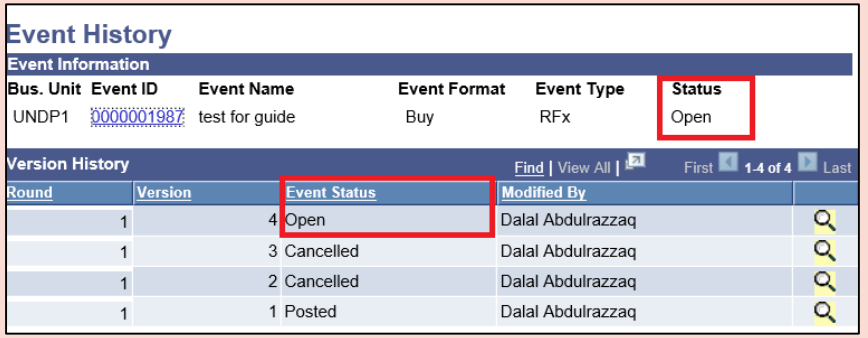
1. When the event is first created, the status is shown as **“Open”**. That means that the event is a draft document and system allows changes to be made. The same applies when a new version is created (e.g. version 2). Version 2 event is in **“Open”** status, even though version 1 is **“Posted”.**

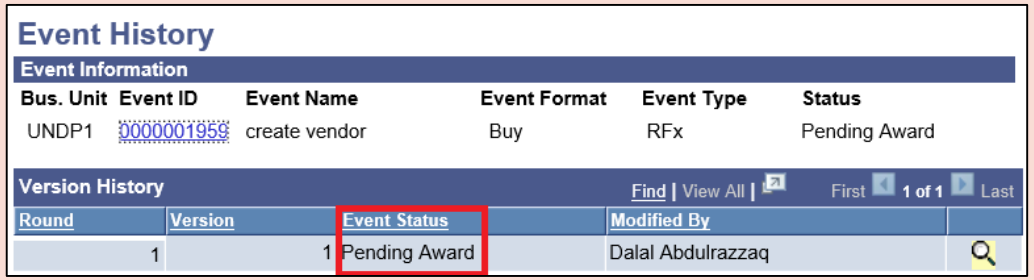
2. When the event is sent for approval, status changes to **“Pending award”.** No more changes can be made by event creator at this stage. **If you need to change something before it is approved, the approver must deny instead of approving the event. If approver denies, event status is changed back to “Open” and you can make changes, and post again for approval**.

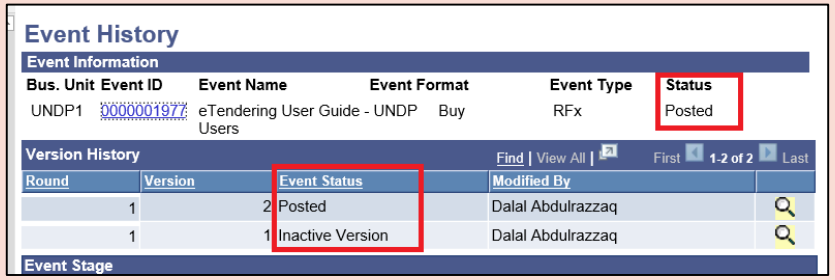
3. Once approver approves the event, the status changes to **“Posted”.** This means the event is now visible to bidders.

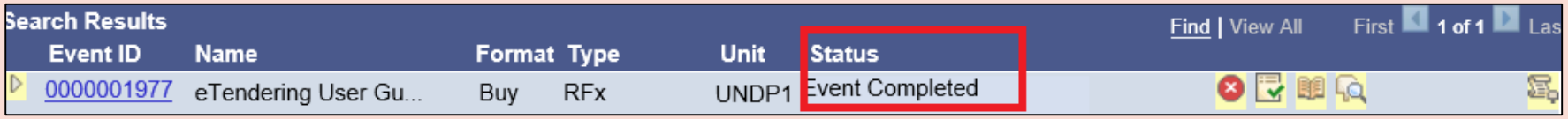
4. When a new version is created (e.g. version 2), it go through same statuses as above while version 1 remains in **“Posted**” status. Once version 2 is approved, it status changes to **“Posted”** and status of version 1 becomes **“Inactive**”.

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.









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.”

Click to return to Manage Events main section

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

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 — Find | View All | First 1-5 of 7 Last

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 — Find | View All | First 1-5 of 6 Last

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 — Find | View All | First 1-3 of 3 Last

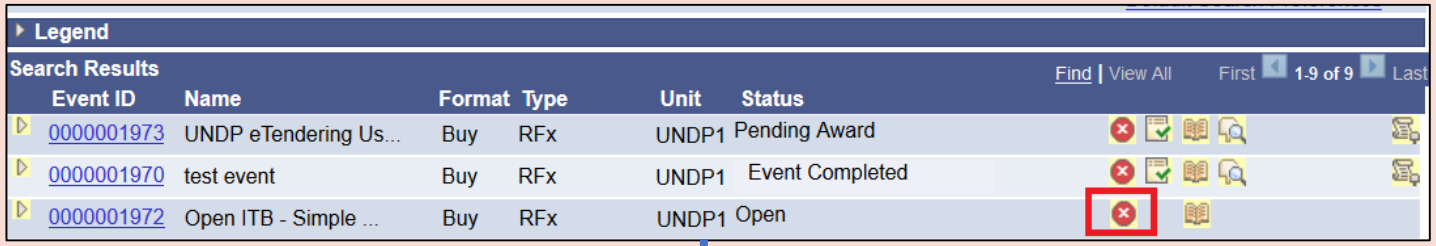
Round	Version	Event Status	Modified By
1	3	Not Awarded	Dalal Abdulrazzaq

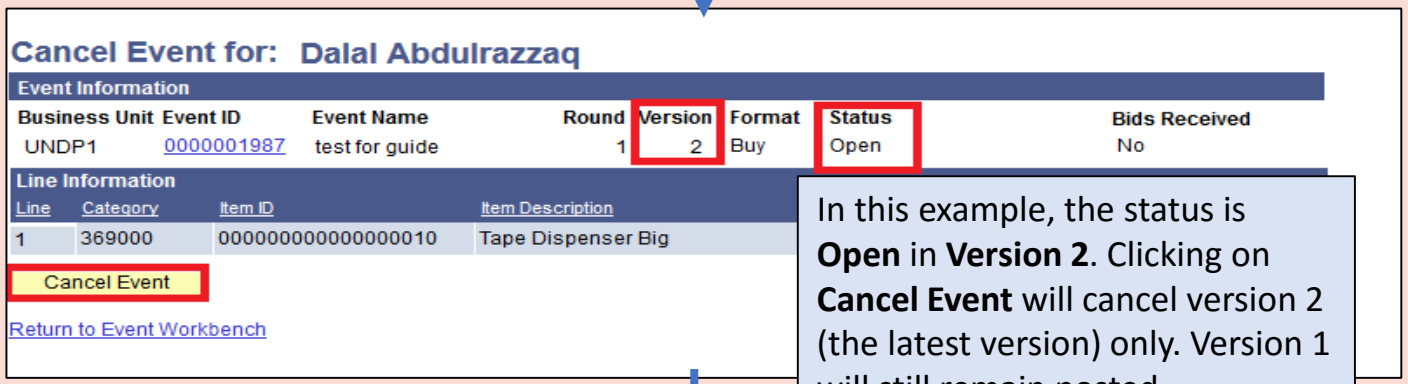
Version History — Find | View All | First 1 of 1 Last

Round	Version	Event Status	Modified By
1	1	Cancelled	Dalal Abdulrazzaq

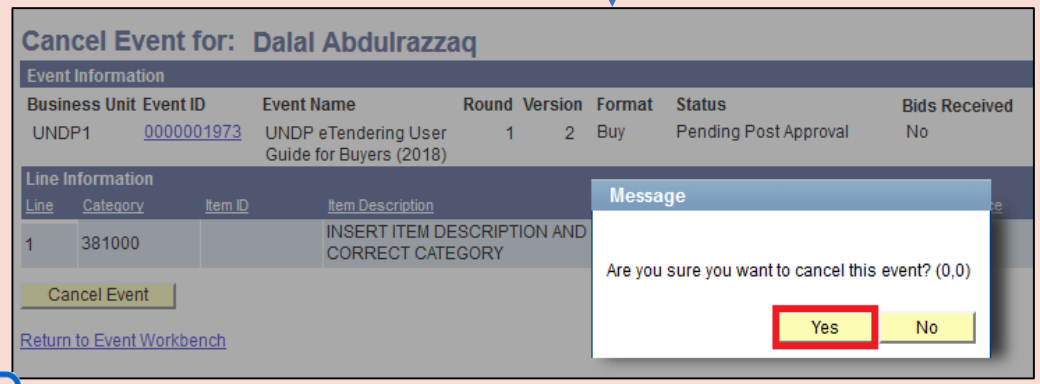
5.9 Cancel an Event

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





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.



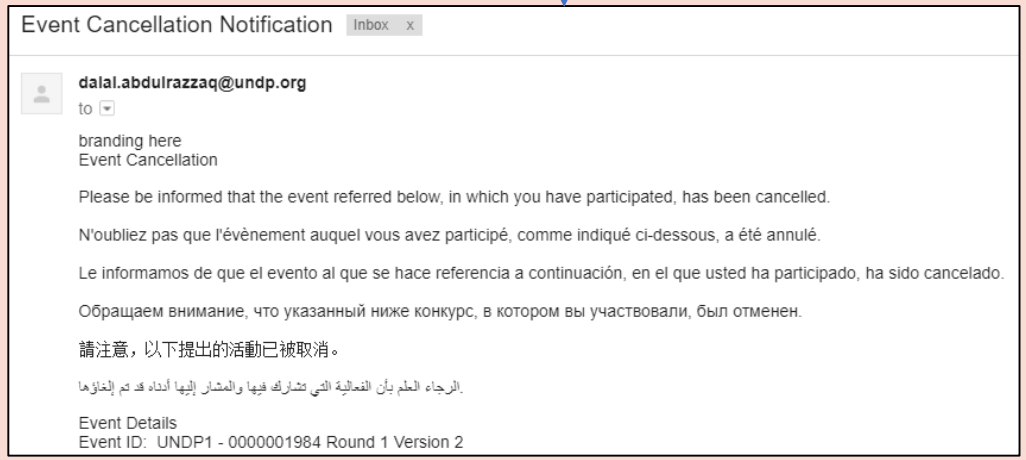
Click to return to Manage Events main section

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.



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 sue 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

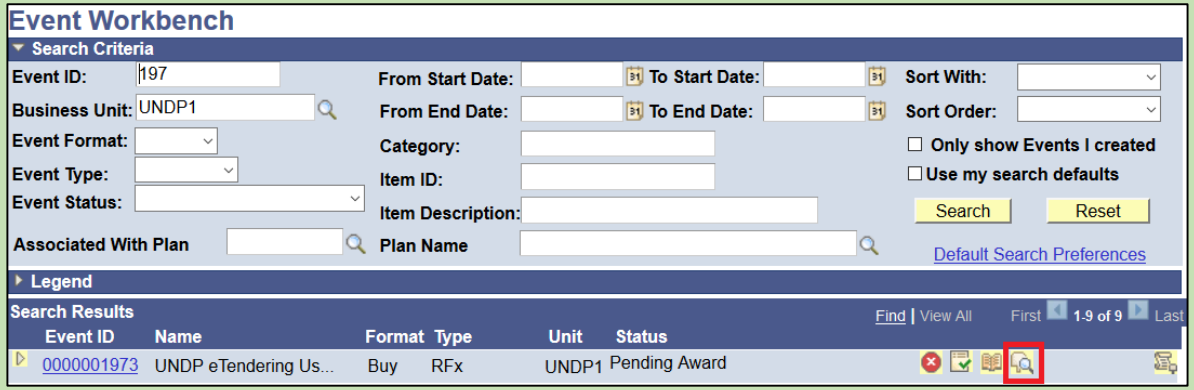
6.4 Using the Evaluation Process Management feature

- 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

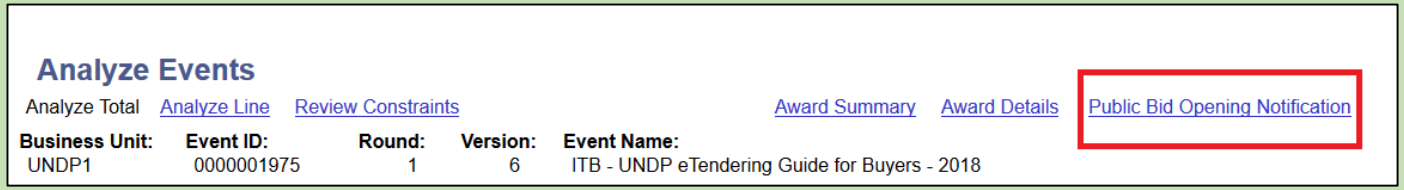
6.1 Public Bid Opening Report (for ITBs only)

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.

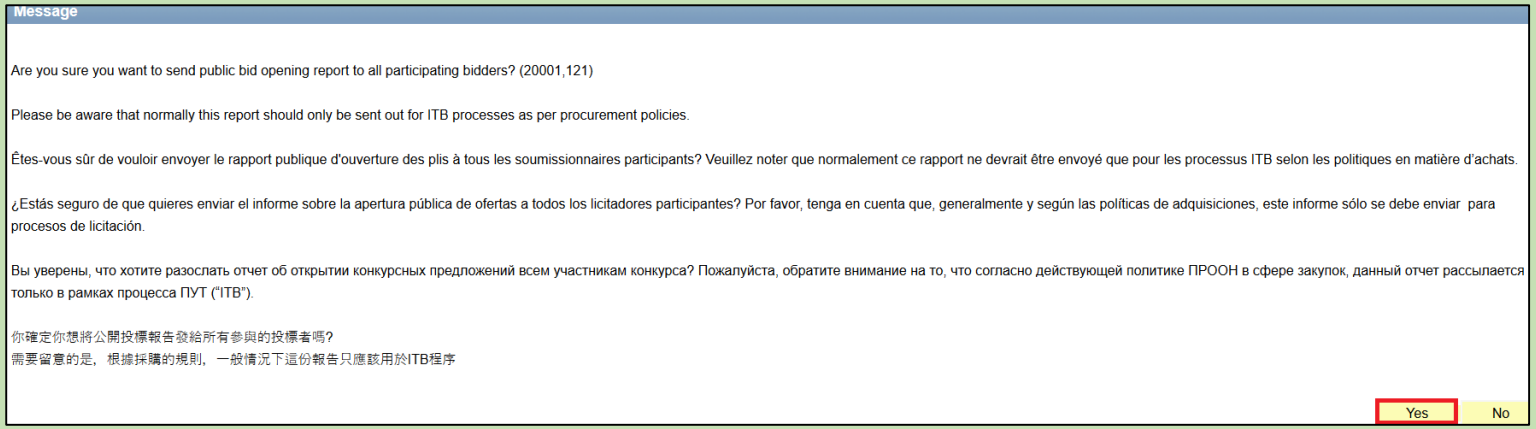
To generate the Public Bid Opening report, go to ***Main Menu → eTendering → Maintain Events → Event Workbench***. Find the concerned event, and click on the ***Analyze Bids*** icon 



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



Click on "***Yes***".



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

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.
Veuillez 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 будут уведомлены соответственно.

亲爱的投标人，

请查收您有参加的被提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

أعزاؤنا مقدمي العطاءات، الرجاء استلام تقرير الفتح العلني لمظاريف العطاءات الخاص بالفعالية المشار إليها والتي شاركتم فيها. الرجاء مراعاة أن هذه المعلومات المتعلقة بالعطاءات يتم استلامها عبر النظام ولا تشير إلى أي ترتيب أو نقاط أو إلى الفائز في الفعالية. يخضع كل العطاءات المستلمة للتقييم استنادًا إلى المعايير المعلن عنها

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.

Click to return to Evaluation of Bids main section

6.2 Public Bid Opening for LOT events

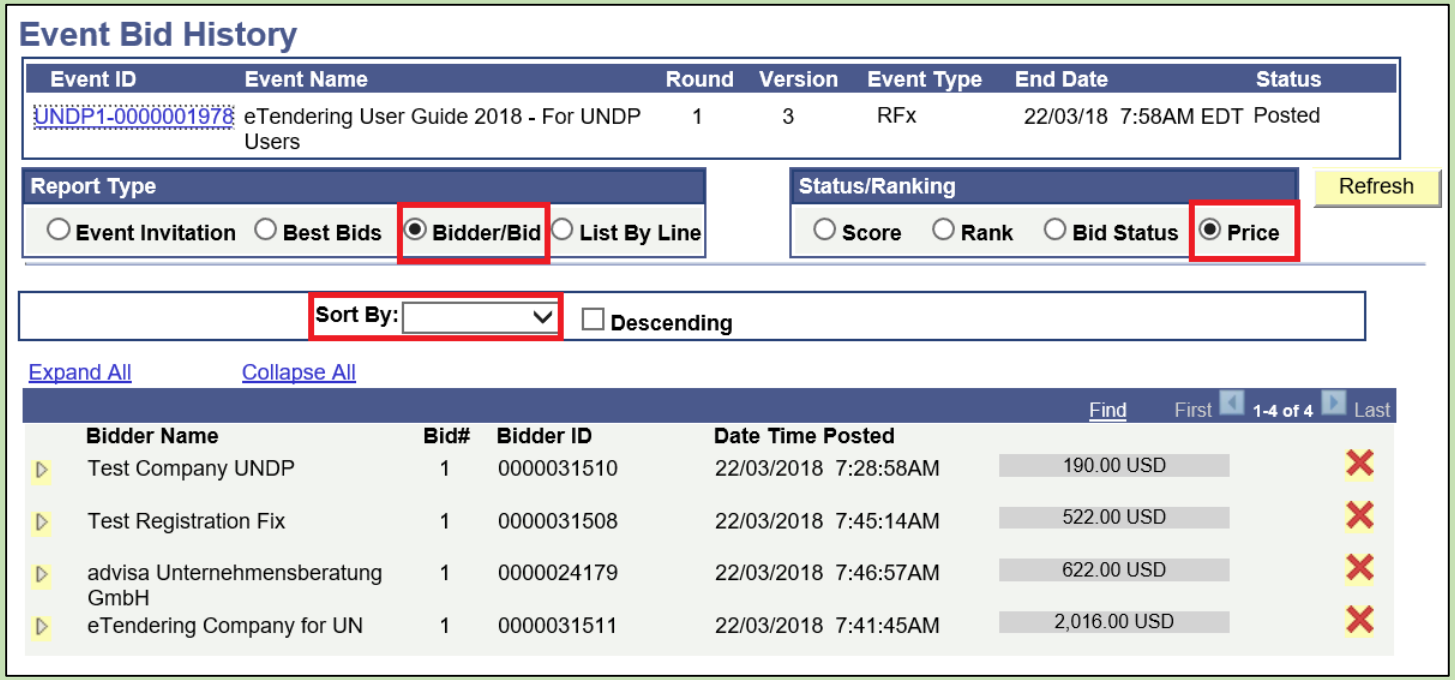
As the automated Public Bid Opening report only includes the total bid price, it is not sufficient for LOT based events where the price for each LOT should be displayed for the bidders. In this case, a Public Bid Opening event with the participation of bidders is necessary.

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:

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.

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

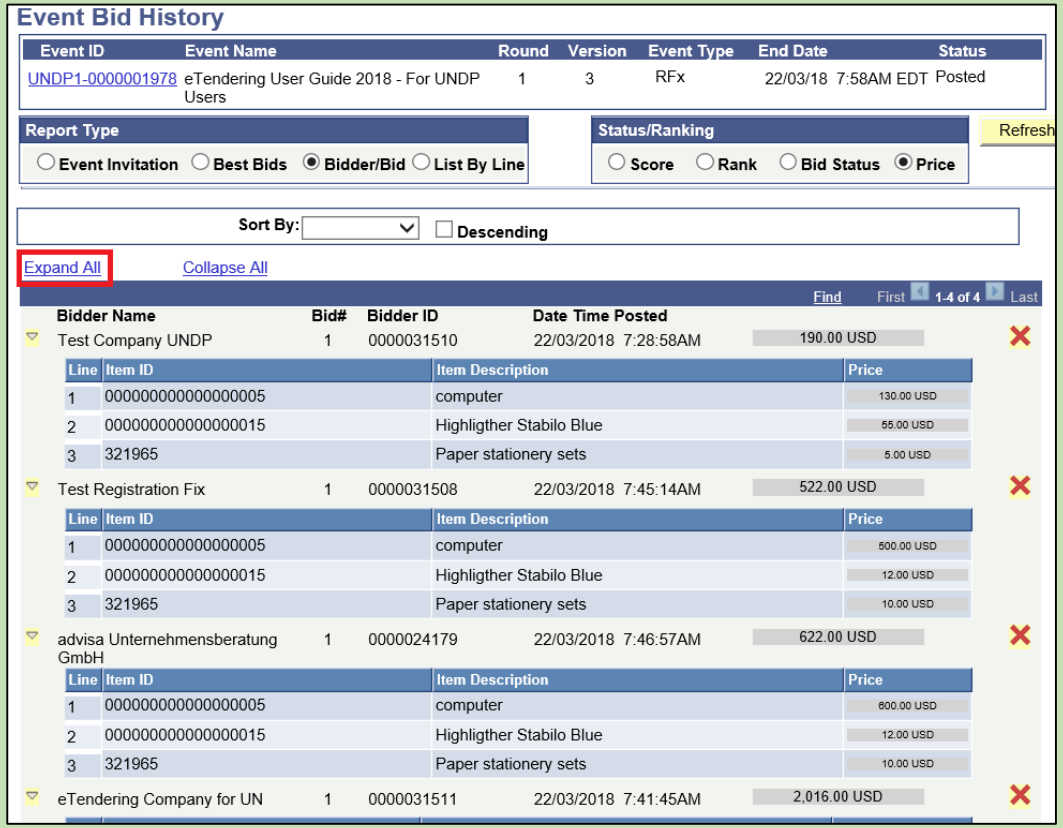
Select ***Report Type: Bidder/Bid*** and ***Status/Ranking: Price***. You may also choose to sort the bids by the company names.



Click to return to Evaluation of Bids main section

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.



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.

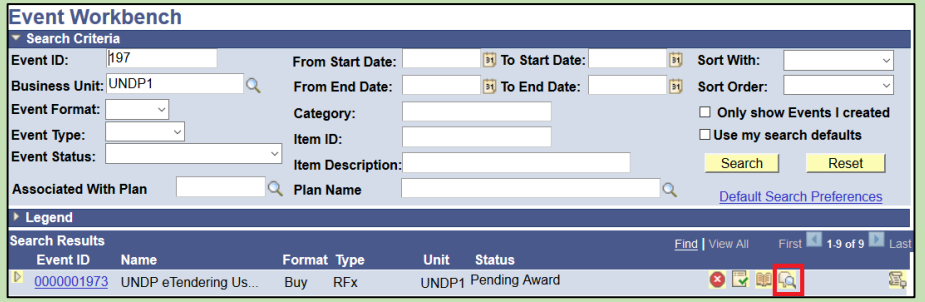
When conducting a Public Bid Opening for LOTs, always use Google Chrome as the web browser. Other browsers will mark the prices of the bids in red or green depending on the automatic scoring done by eTendering, which can potentially confuse bidders as it implies that the winner has already been selected 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 

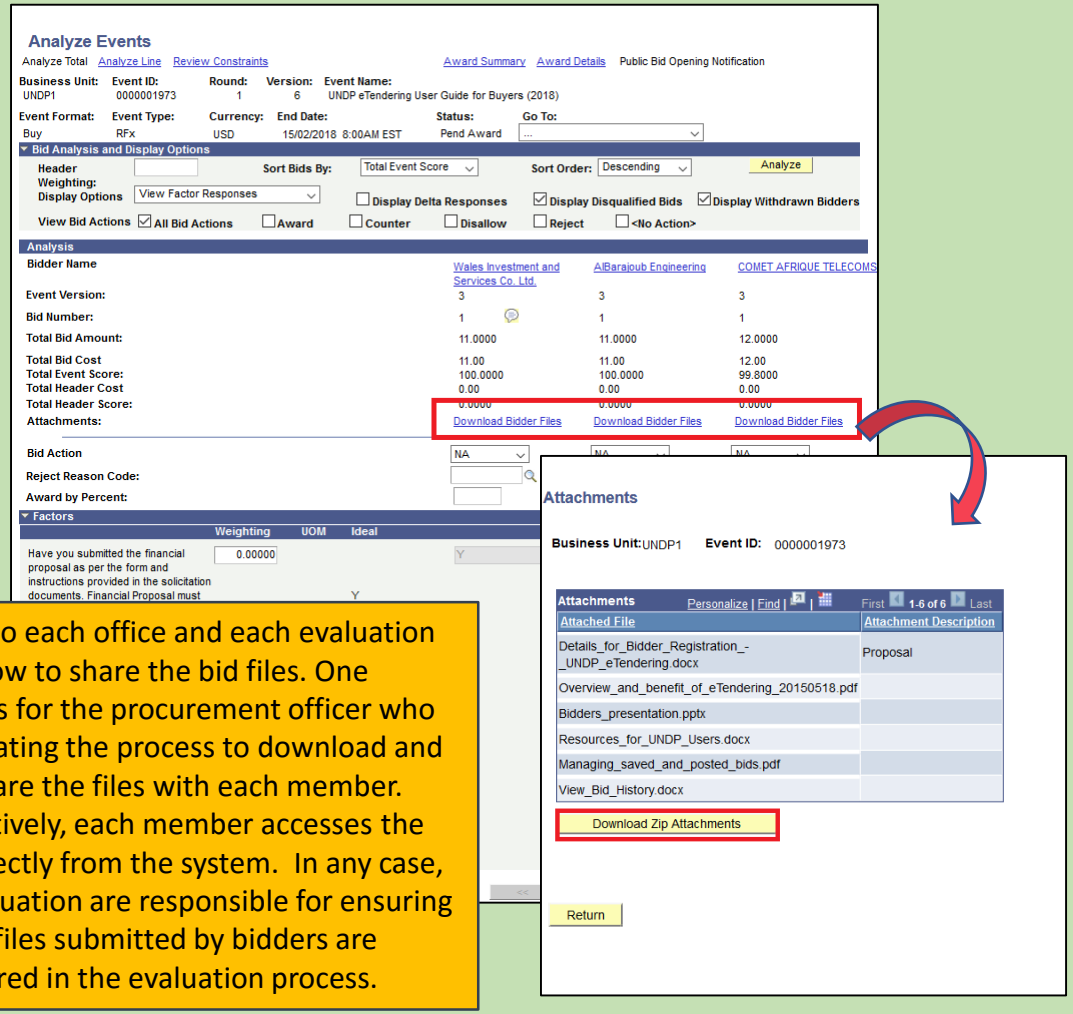


From the ***Analyze Events*** page, there are two ways how to download bidder files:

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.





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.

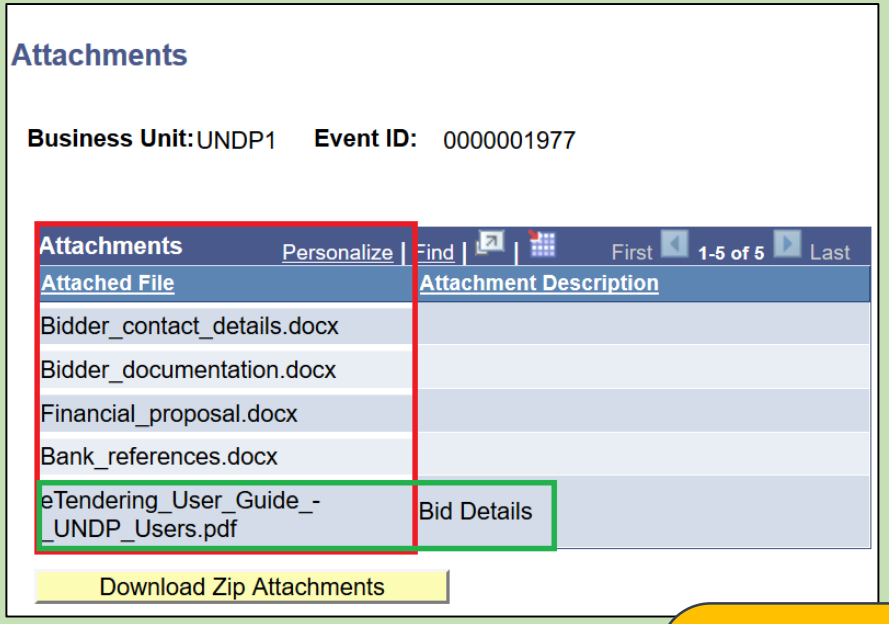
The ZIP download may not work if bidders have uploaded a large number of individual files. Bidders should be instructed in the solicitation documents on file upload restrictions and specifications. For more information click here

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.

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.



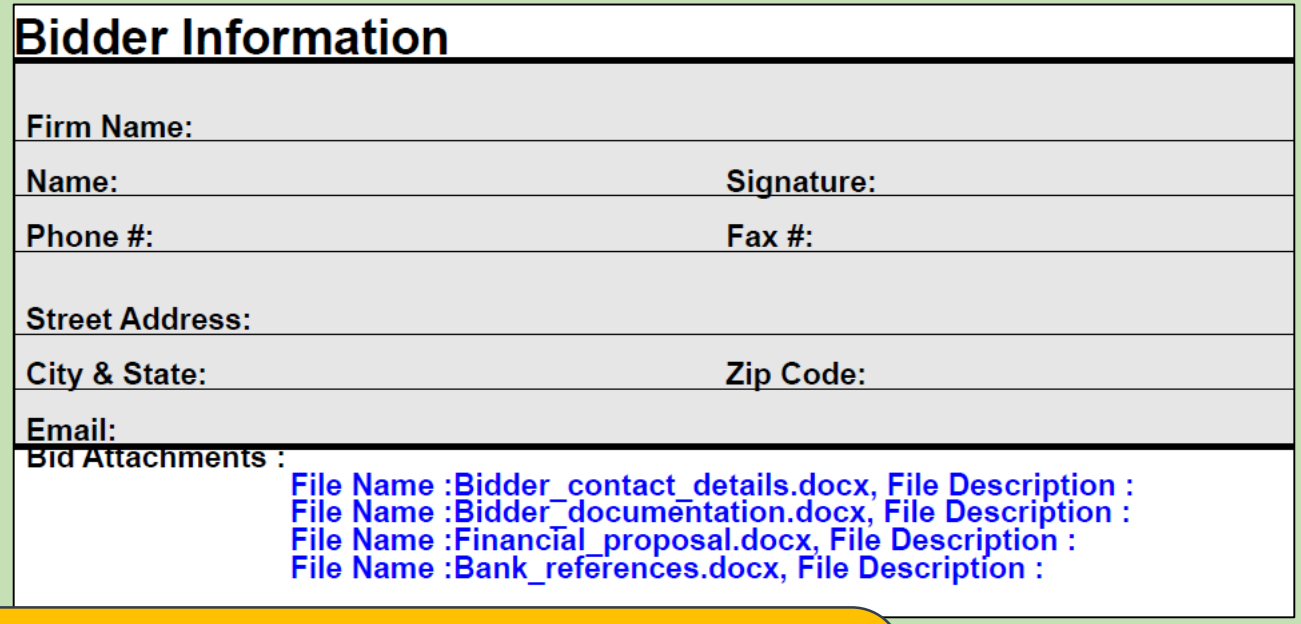
Attachments

Business Unit: UNDP1 **Event ID:** 0000001977

Attachments Personalize | Find | First 1-5 of 5 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.

Click to return to Evaluation of Bids main section

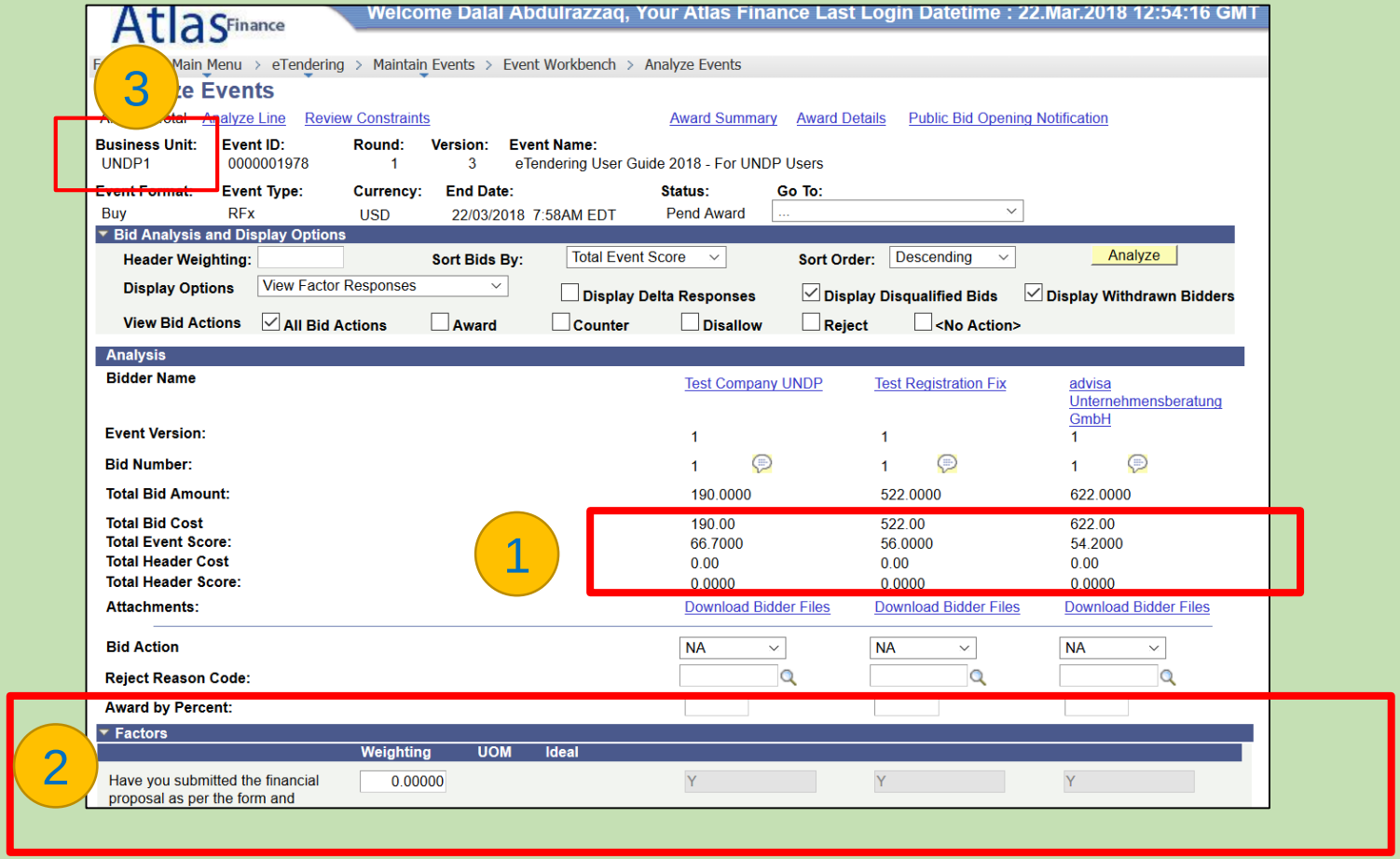
6.3 Opening & Downloading Bids: Download Files Individually

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**.



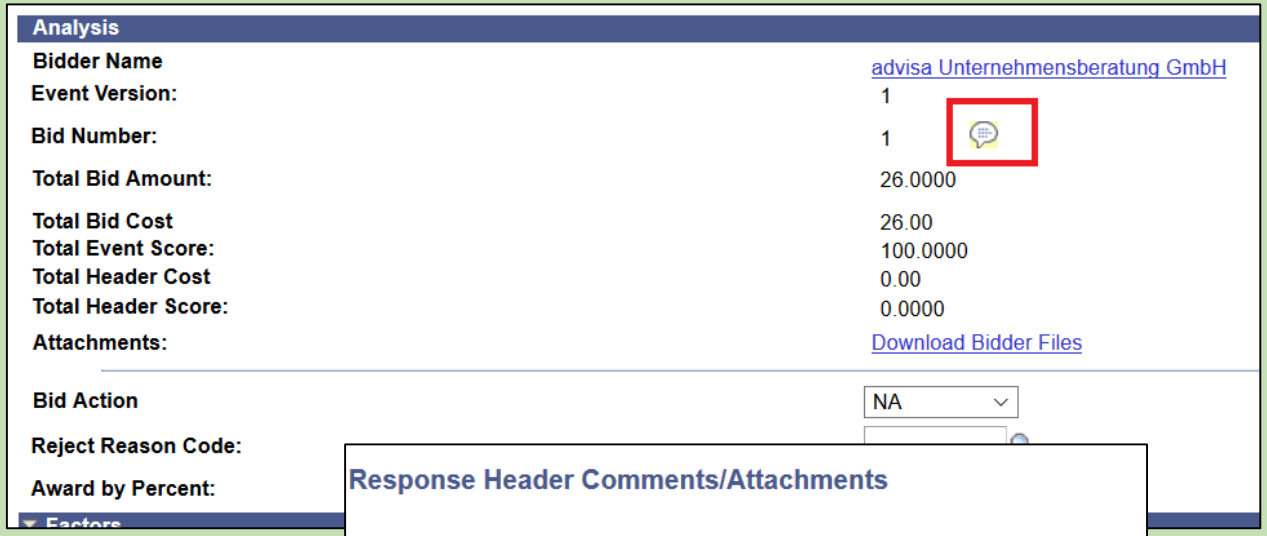
Click to return to Evaluation of Bids main section

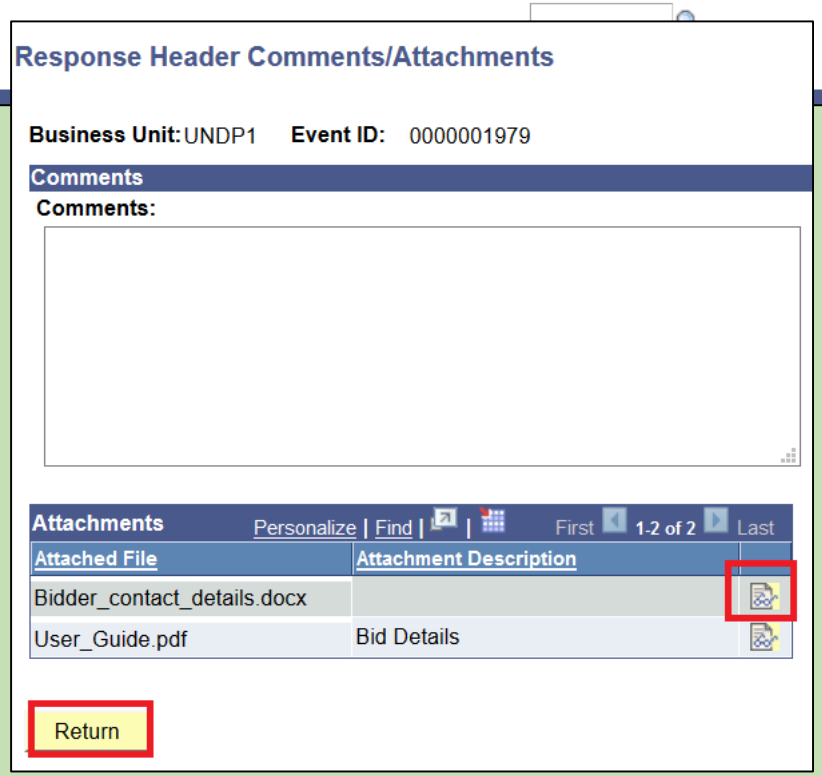
6.3 Opening & Downloading Bids: Download Files Individually

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.





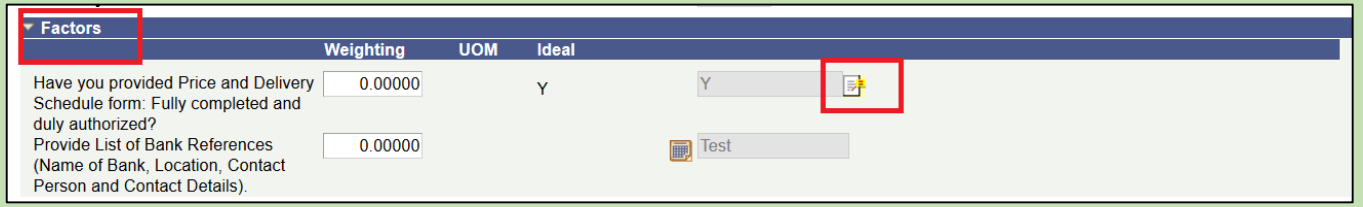
Click to return to Evaluation of Bids main section

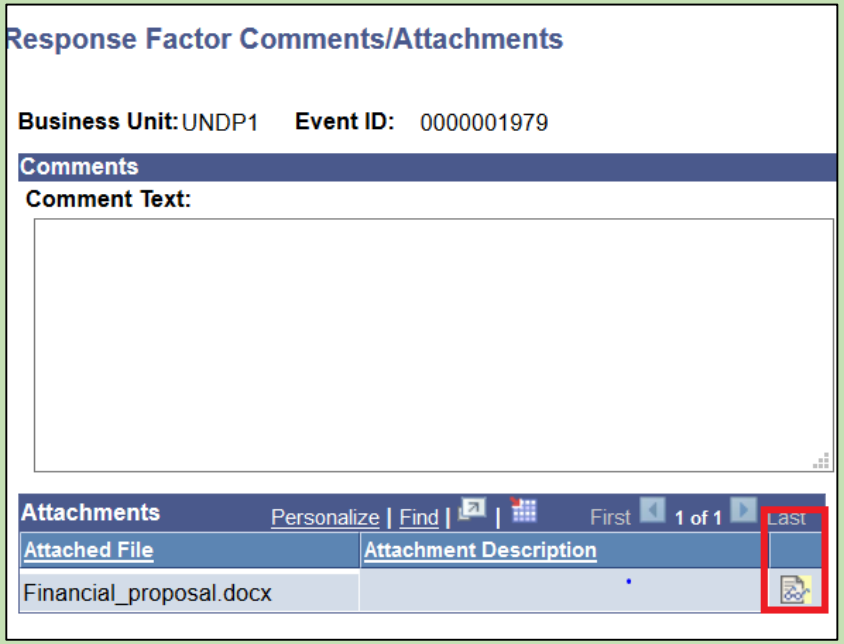
6.3 Opening & Downloading Bids: Download Files Individually

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.





Click to return to Evaluation of Bids main section

6.3 Opening & Downloading Bids: Download Files Individually

3. Bidder files at the Line Item Level

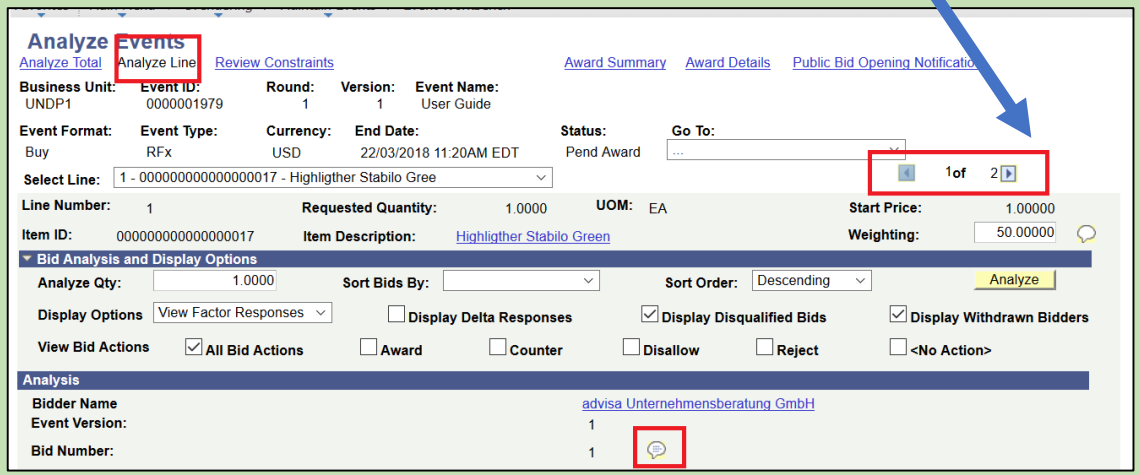
Finally, to access and view bidder files at the Line item level, from the ***Analyze Events*** page, click on ***Analyze Line*** link.

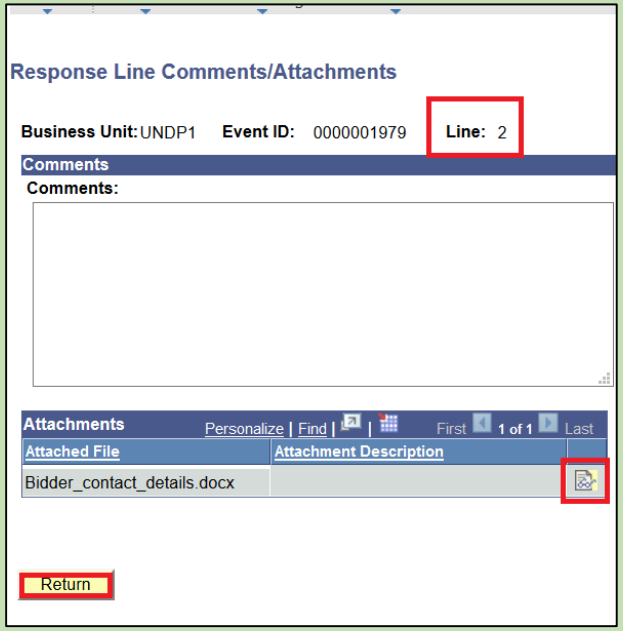
For each Line item, click on the bubble icon to view and download Bidder files for each Bidder.

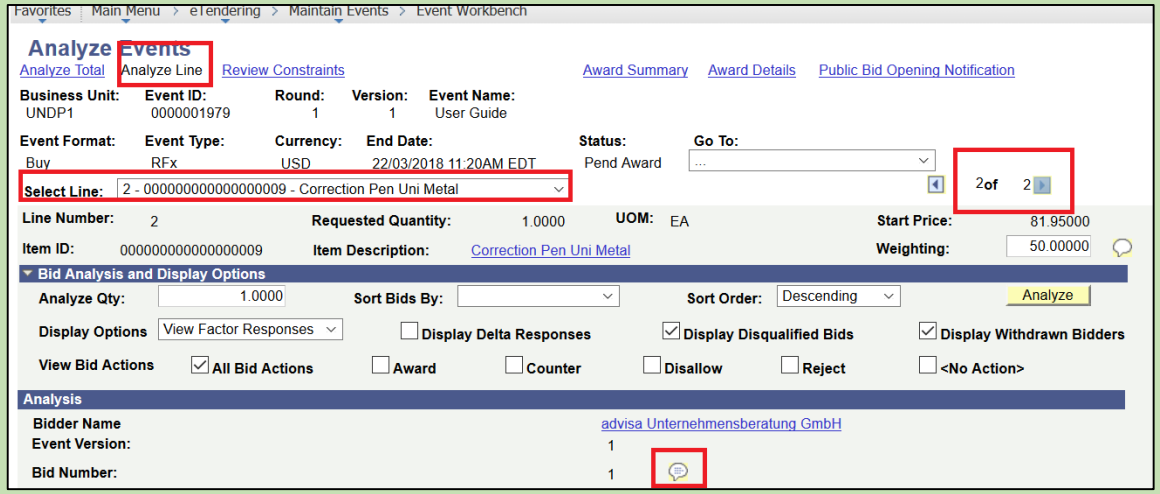
To view and download the files, click on the eyeglass icon next to each corresponding file.

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.







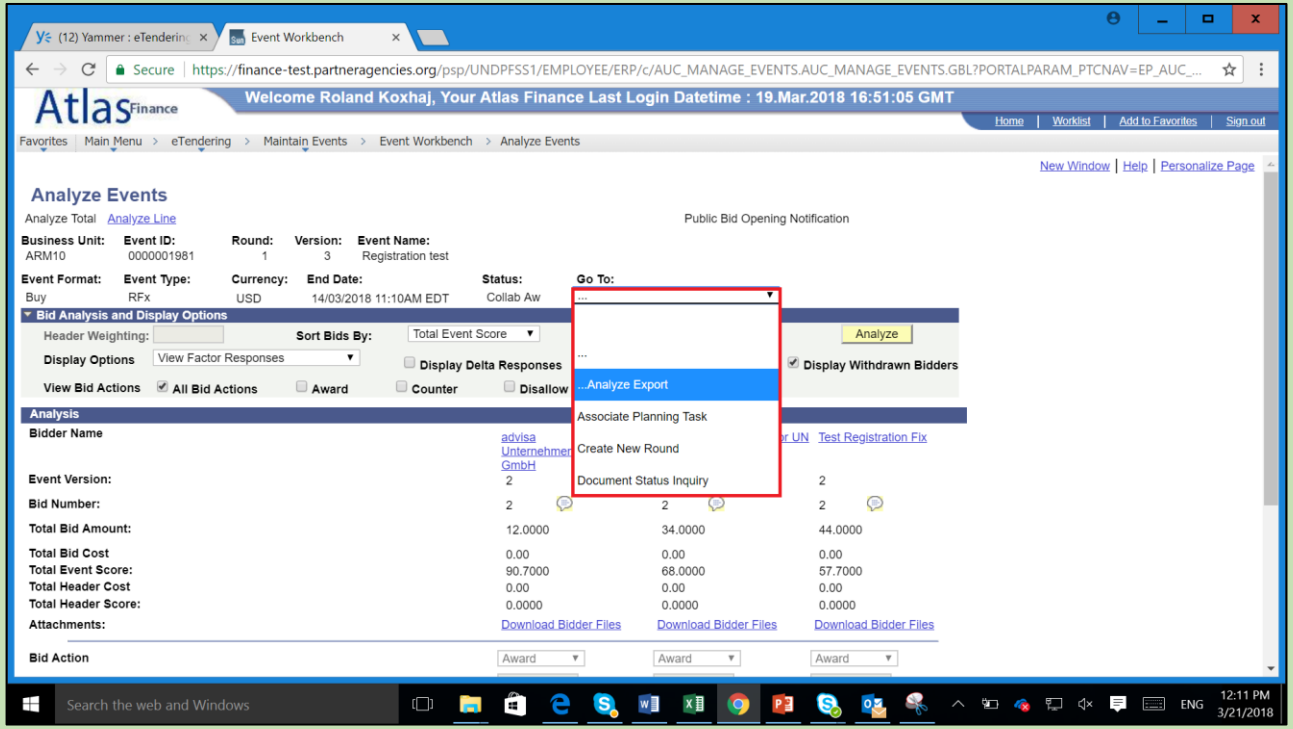
Click to return to Evaluation of Bids main section

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.



Click to return to Evaluation of Bids main section

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.

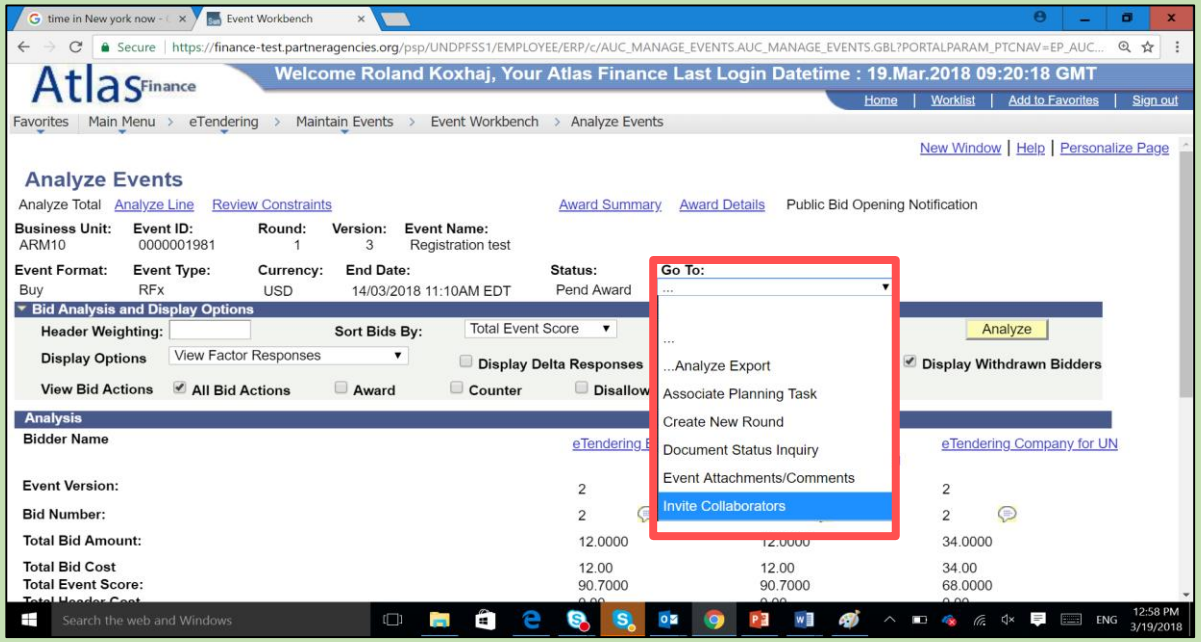
Click to return to Evaluation of Bids main section

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"**



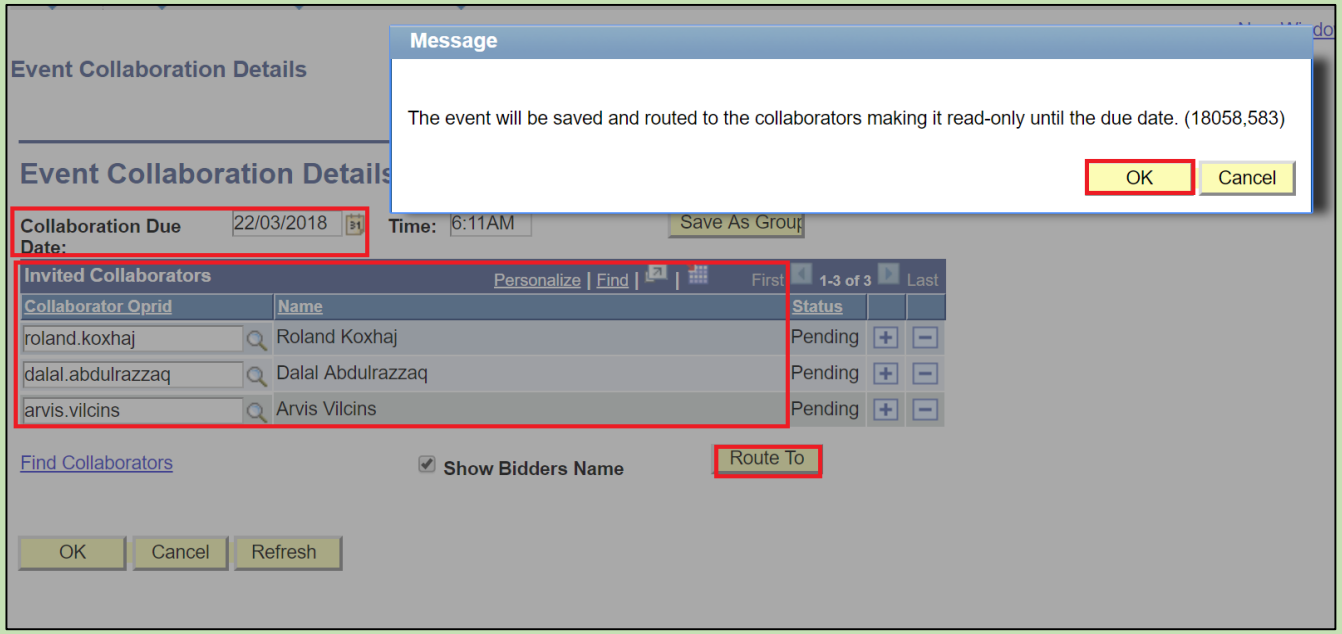
Non-ATLAS users cannot be invited as collaborators. In such cases, evaluation reports need to be signed externally, and then uploaded in this page. The remaining evaluation team members with access to ATLAS still need to sign online in the system.

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.



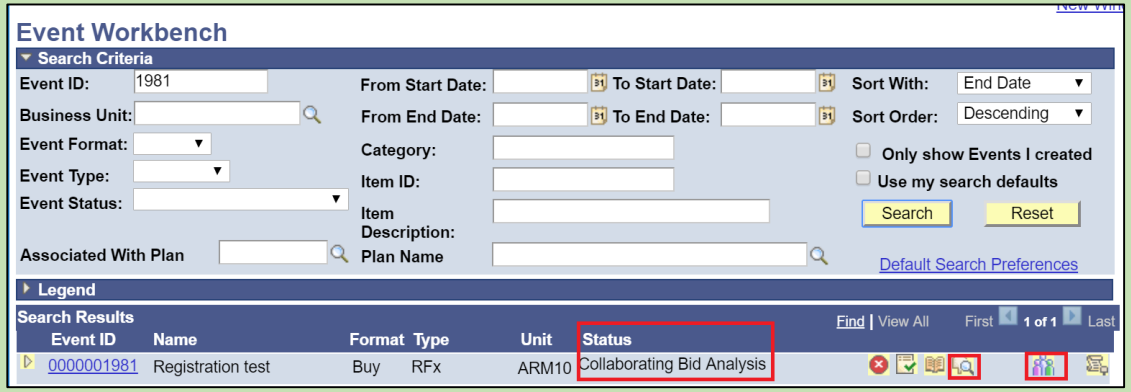
Please note that the **Collaboration due date** does not have any functional impact on the process, but it will not allow buyer to create a contract until due date has passed. It is recommended due date is selected as a very near future date, to avoid situations where evaluation has been completed but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

Click to return to Evaluation of Bids main section

6.4 Evaluation Process Management Feature

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

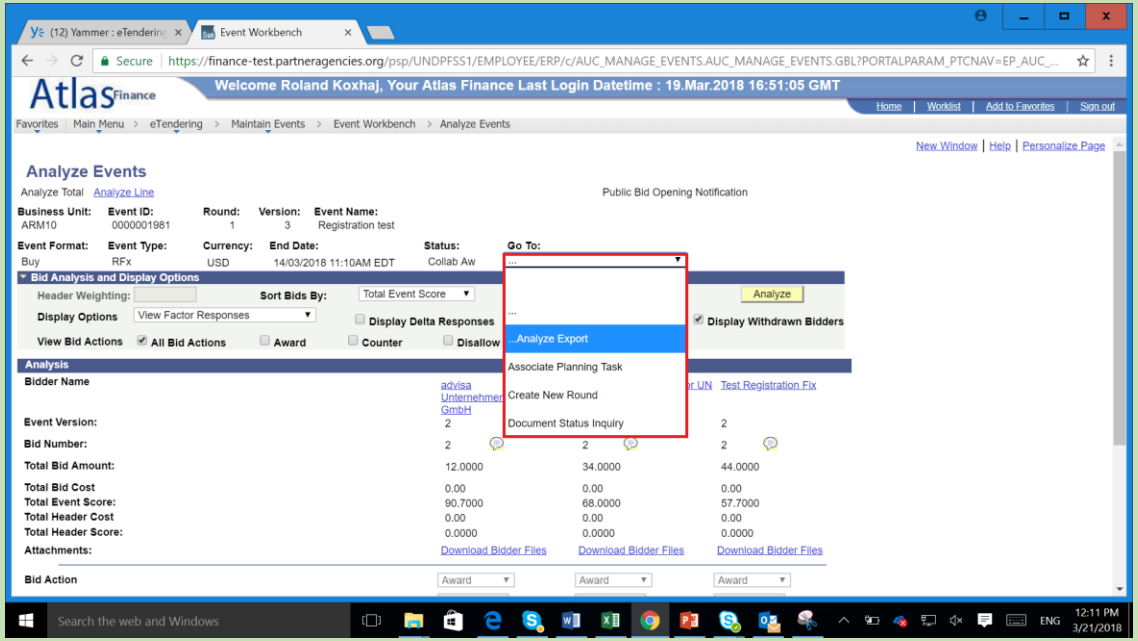
To go to the bids analysis and evaluation page, go to the Event Workbench, and click on the "***Analyze Bids***" and ***"Bid Collaboration"*** icons.



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".***



Click to return to Evaluation of Bids main section

6.4 Evaluation Process Management Feature

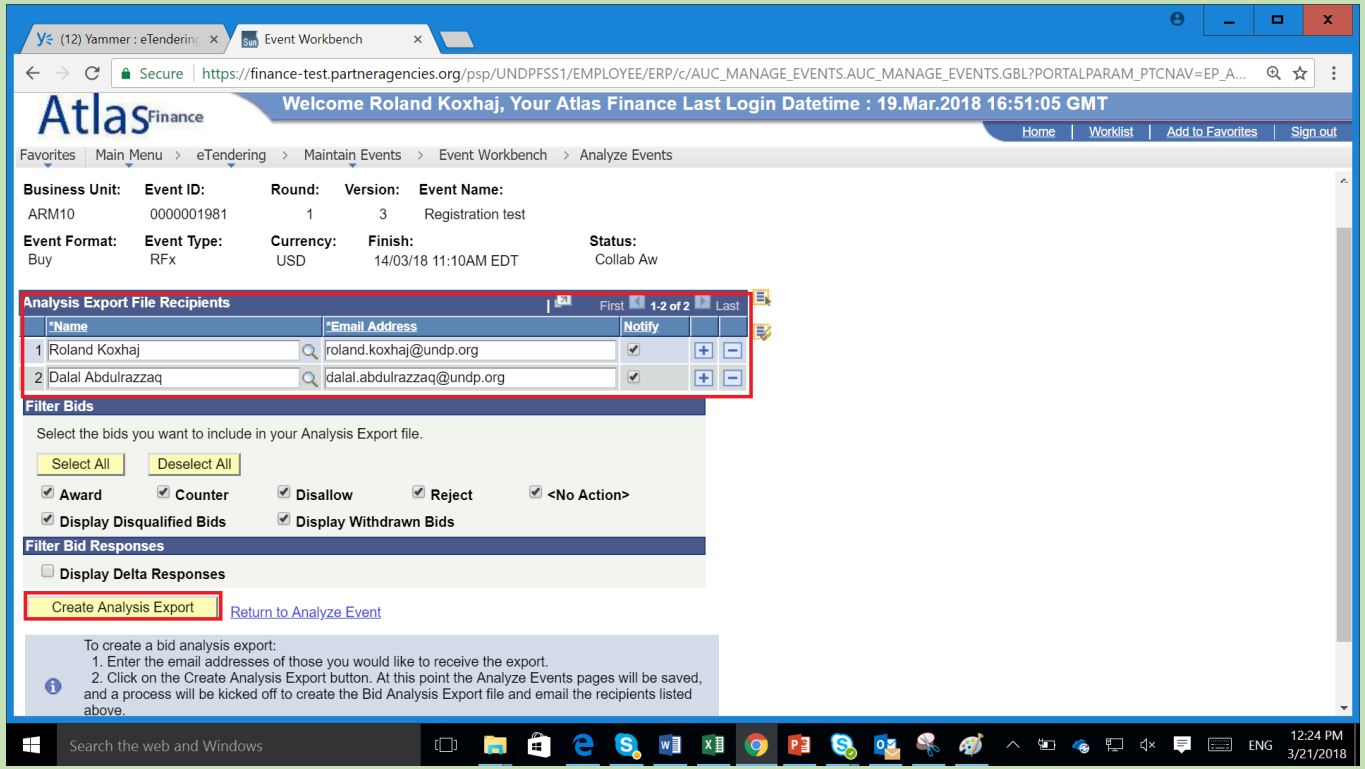
Step 2: Export Event Analysis File to Evaluation Team

- 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.



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 an uploaded in the evaluation page in the system.



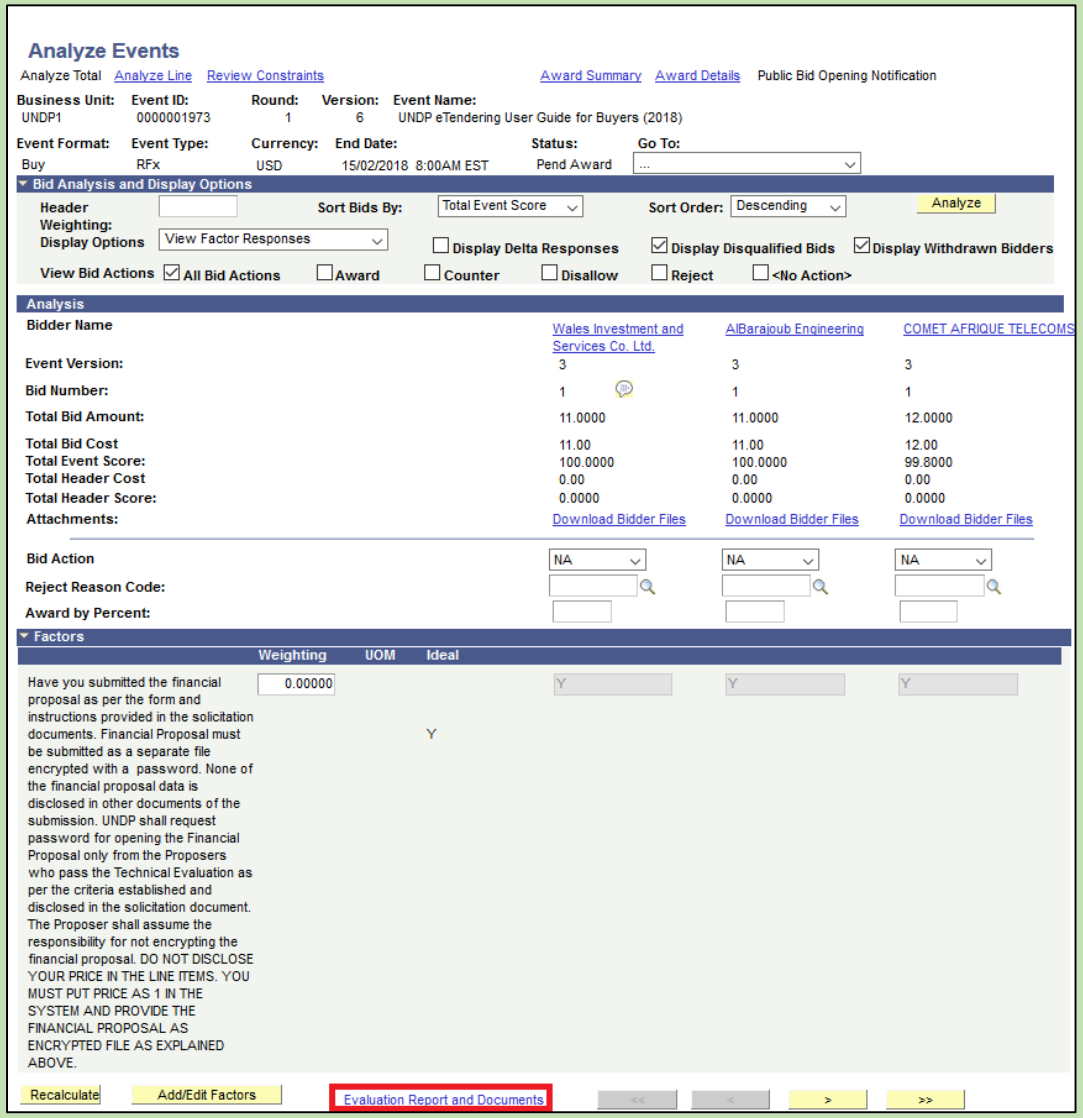
Click to return to Evaluation of Bids main section

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



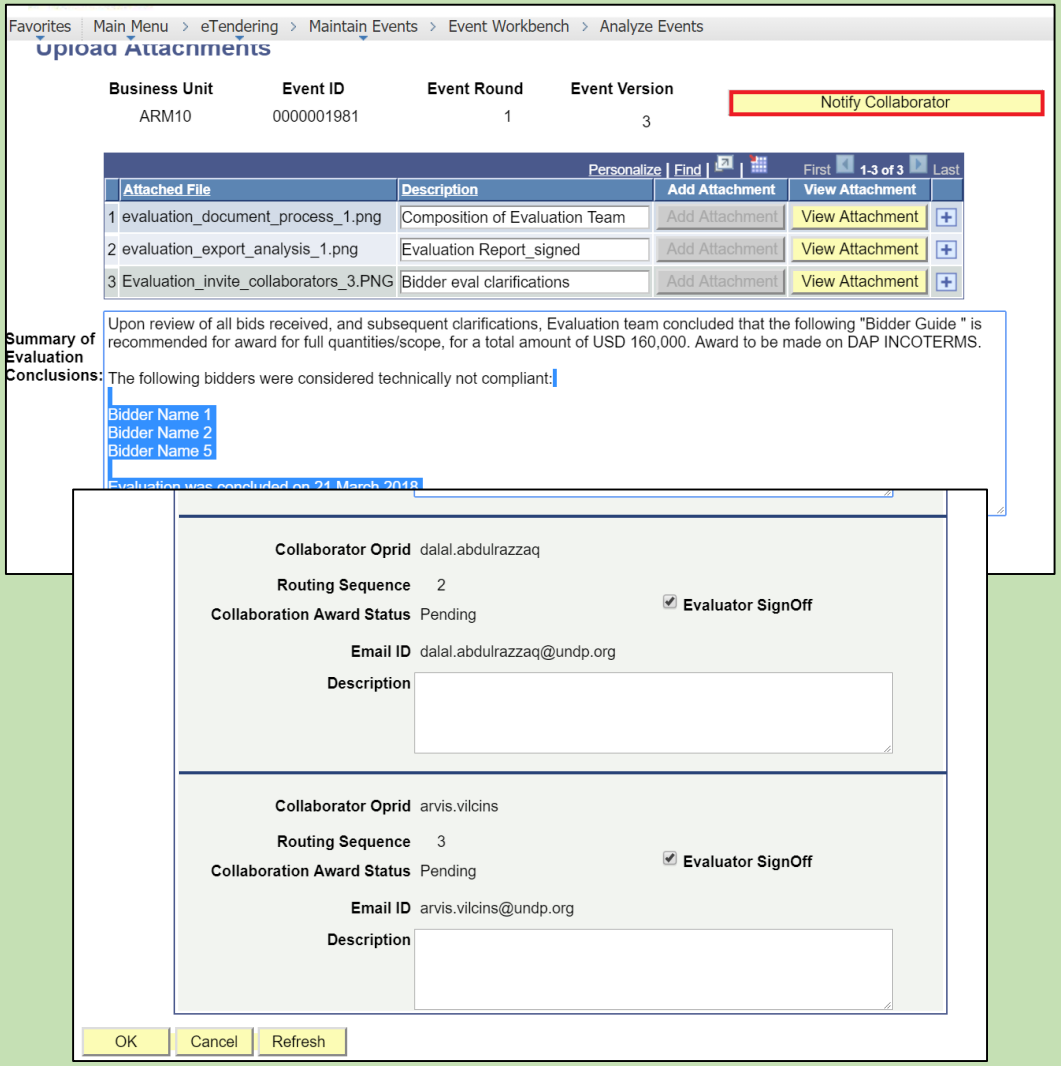
Click to return to Evaluation of Bids main section

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 sing of in the system. Normal email can be sent, or ***"Notify Collaborator"*** feature can be used.



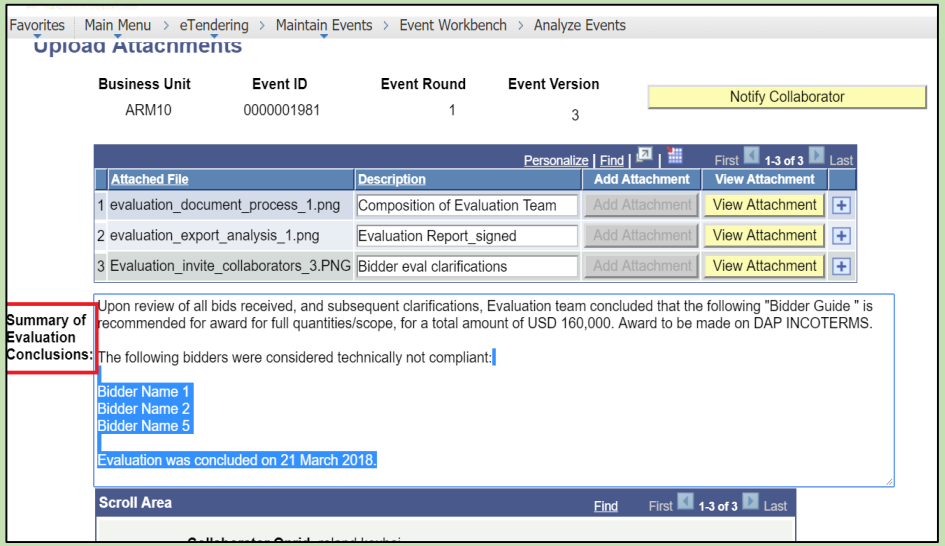
Click to return to Evaluation of Bids main section

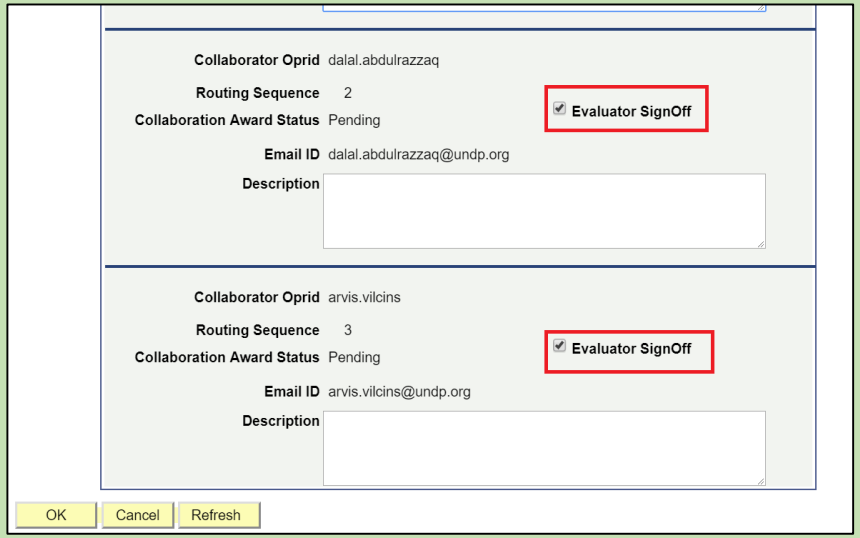
6.4 Evaluation process Management Module

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.

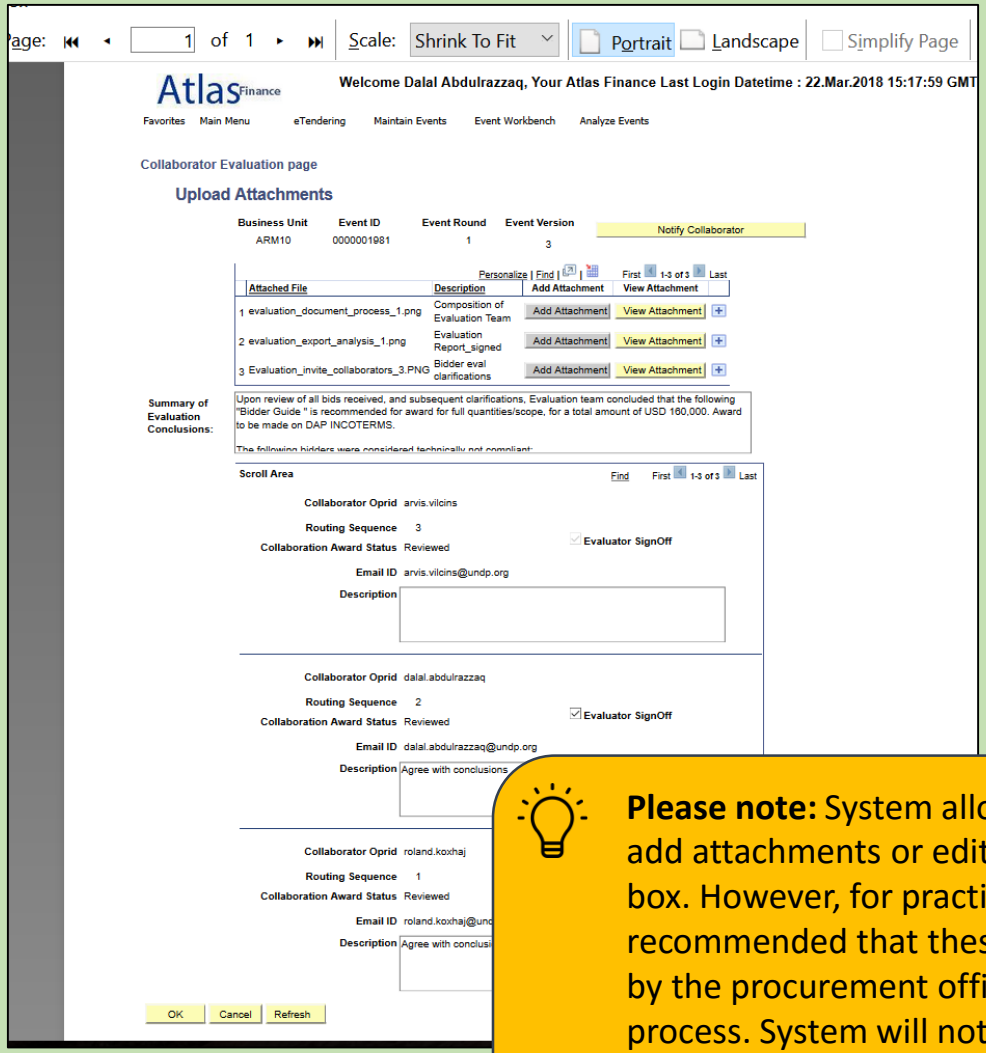
Click to return to Evaluation of Bids main section

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.)



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.

Click to return to Evaluation of Bids main section

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

7.0 Tender Award from the System

Click to return to TOC

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.

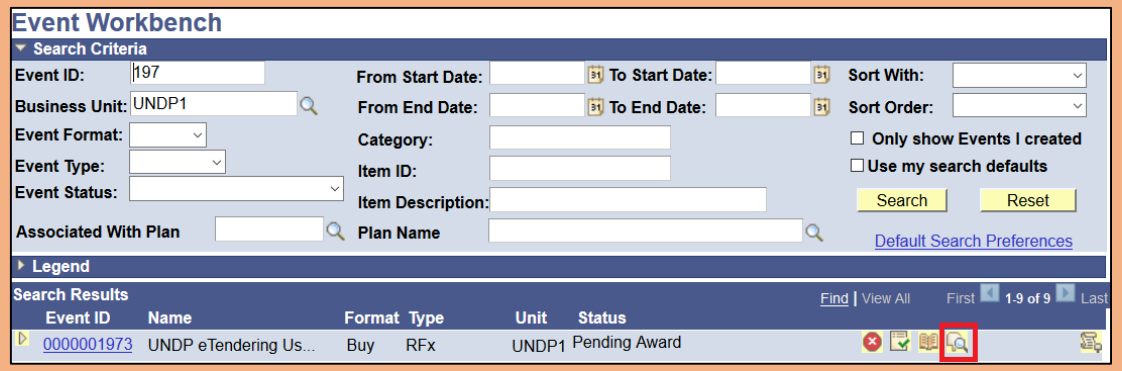
7.1 Identify awarded bidder
7.2 Specify Awarded quantities
7.3 Create vendor and Purchase Order
7.4 Close event manually (when no award made or only partial award).
7.5 Publish Award.

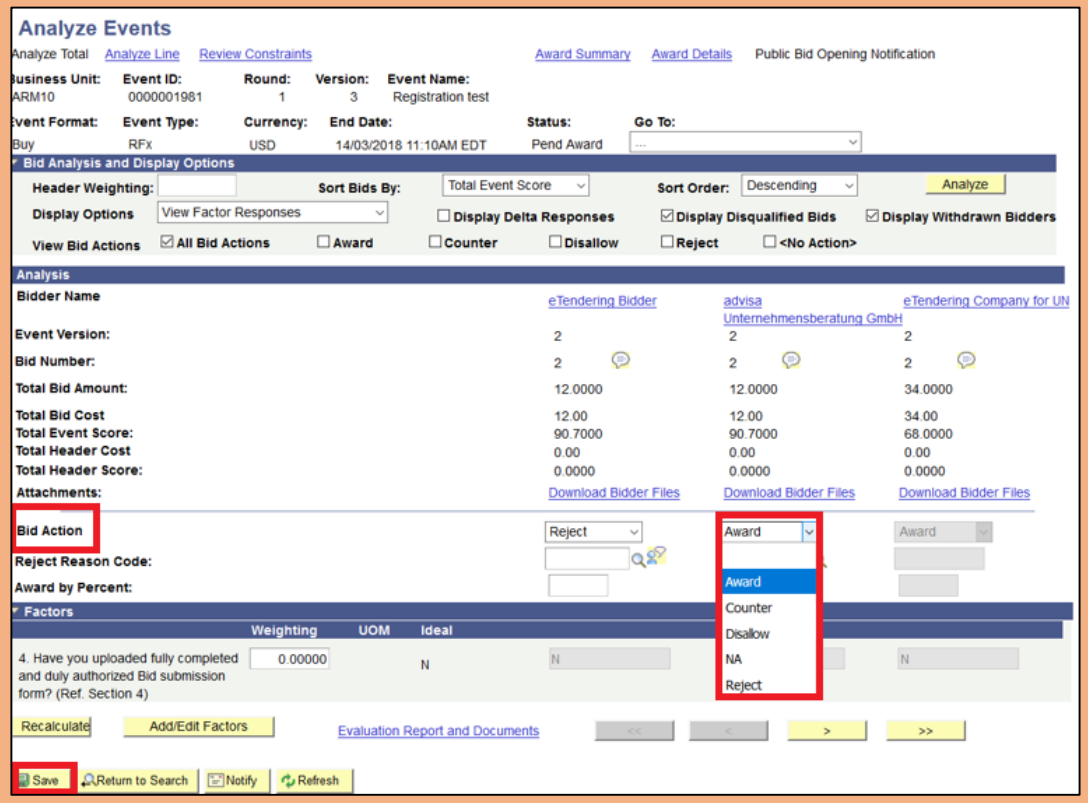
7.1 Identify Awarded Bidder

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.





Click to return to Tender Award main section

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.

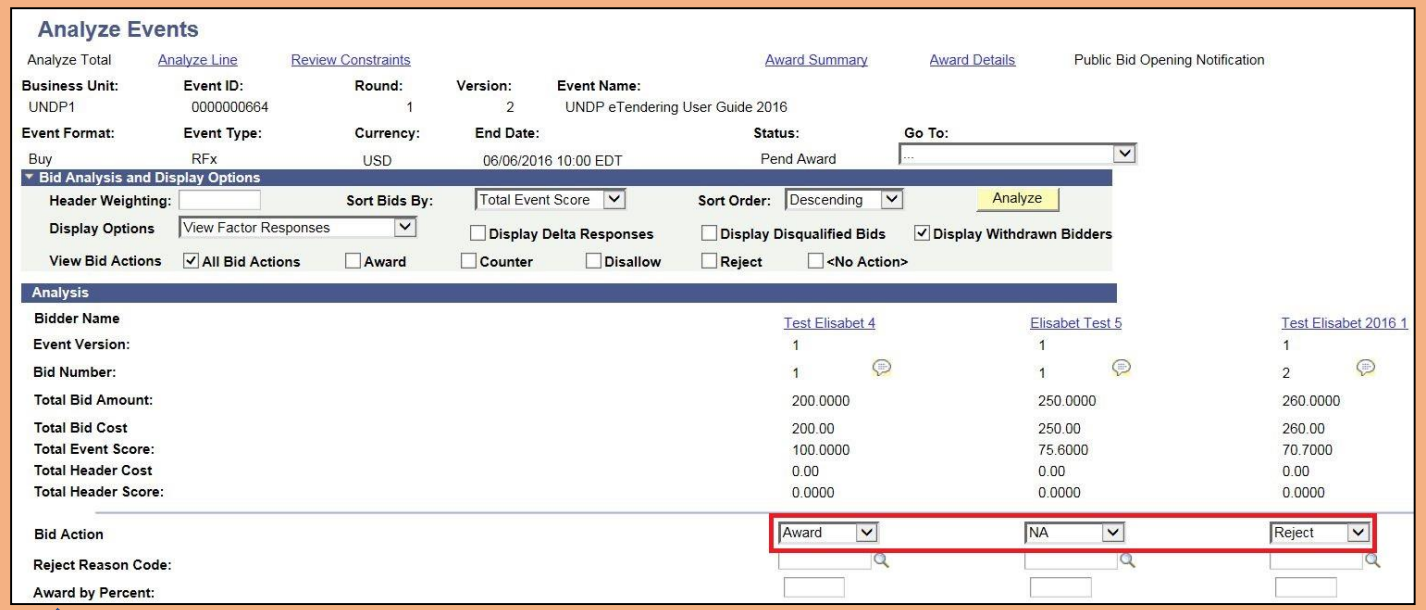
First of all, the procurement personnel should categorize all bidders into one of the following categories:

- **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*****.**



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.

Click to return to Tender Award main section

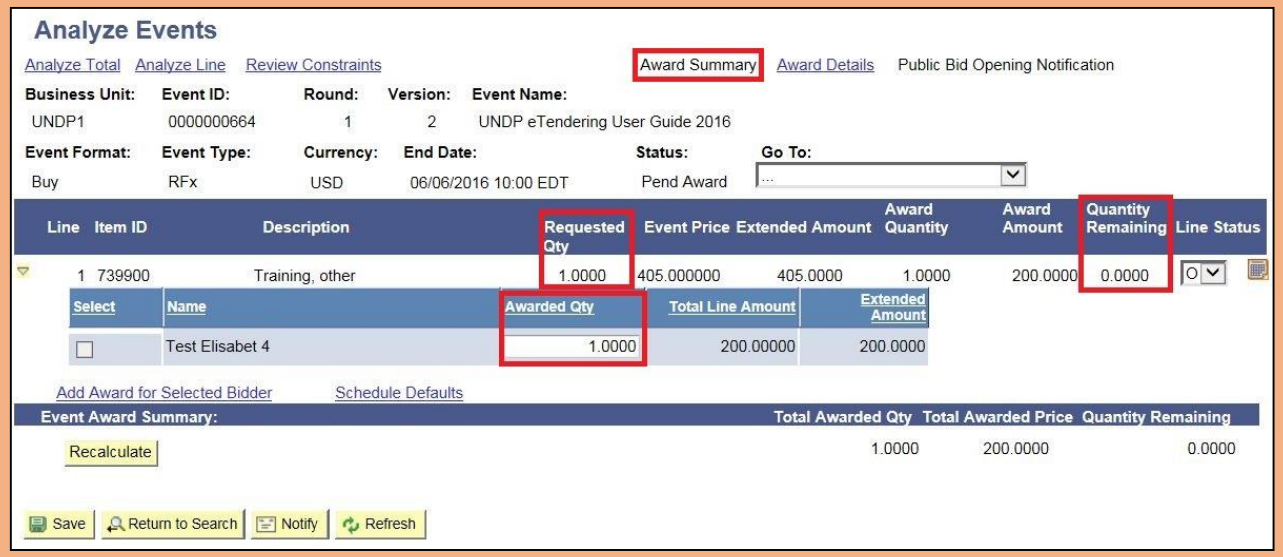
7.2 Specify Awarded Quantities

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.



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.

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

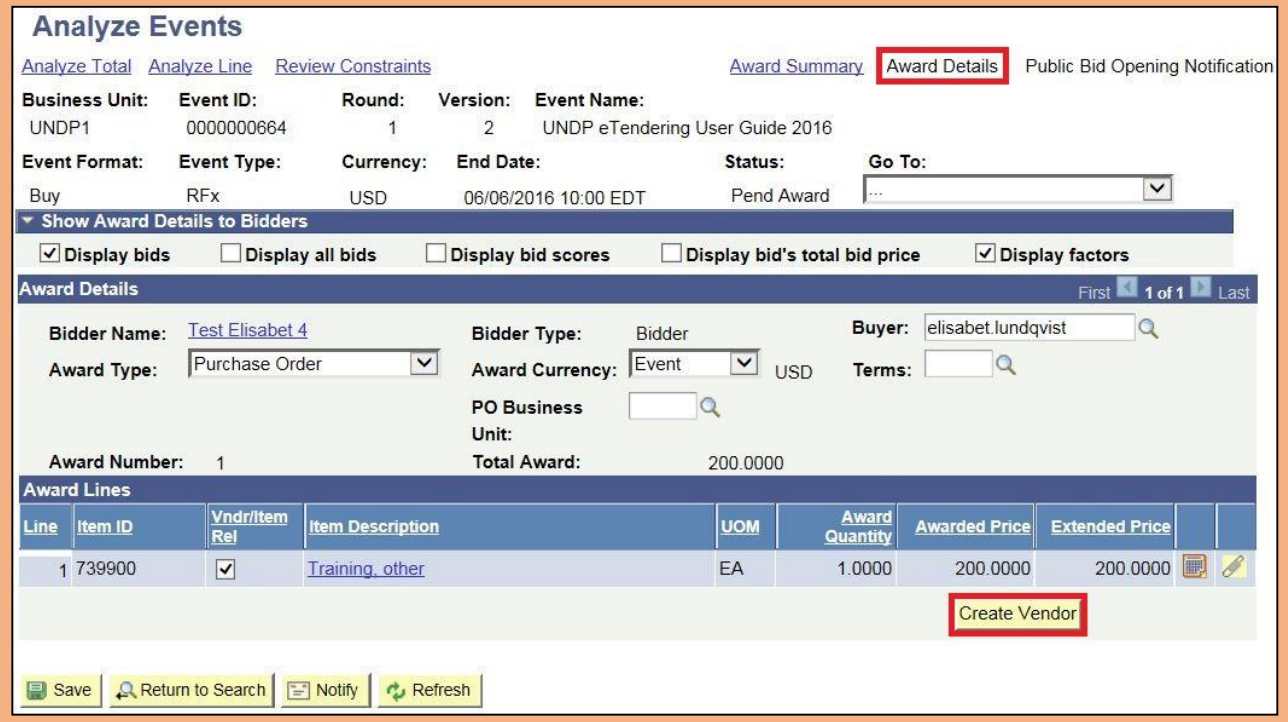
Check for duplicate vendor

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.



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.

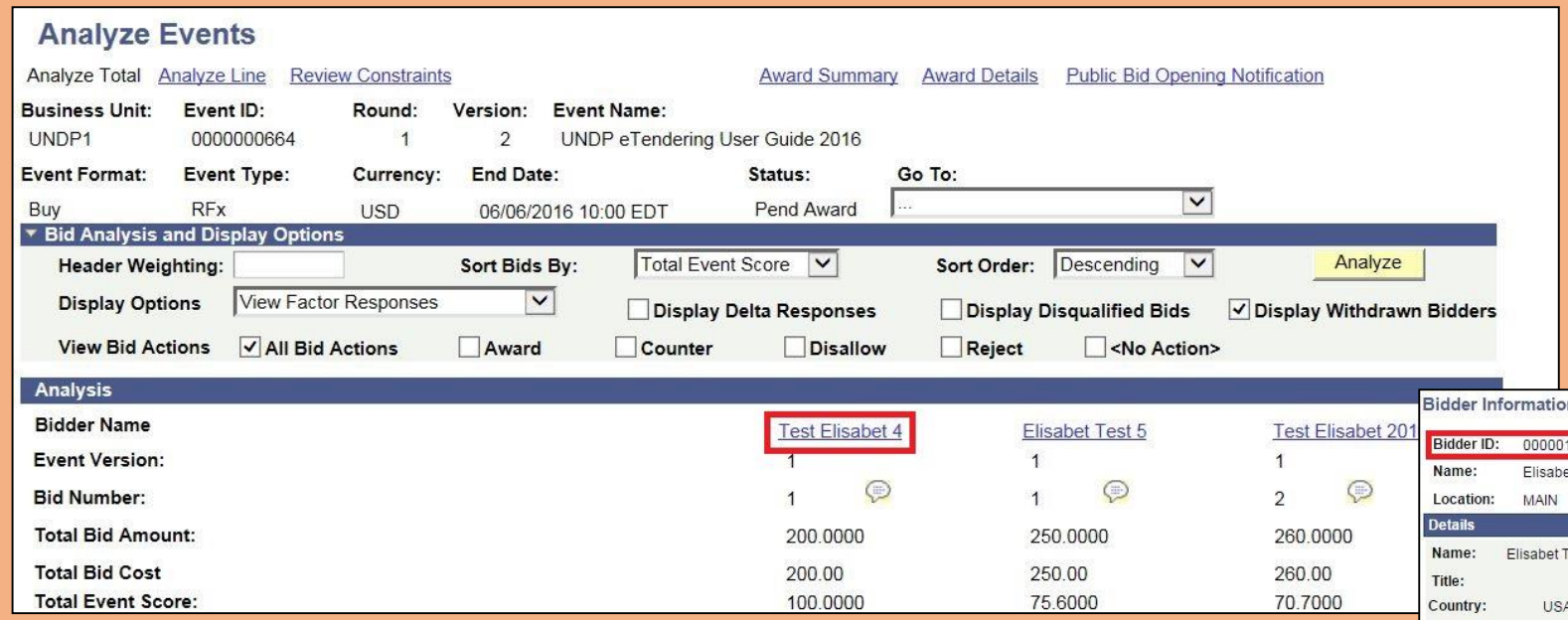


Click to return to Tender Award main section

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**.





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

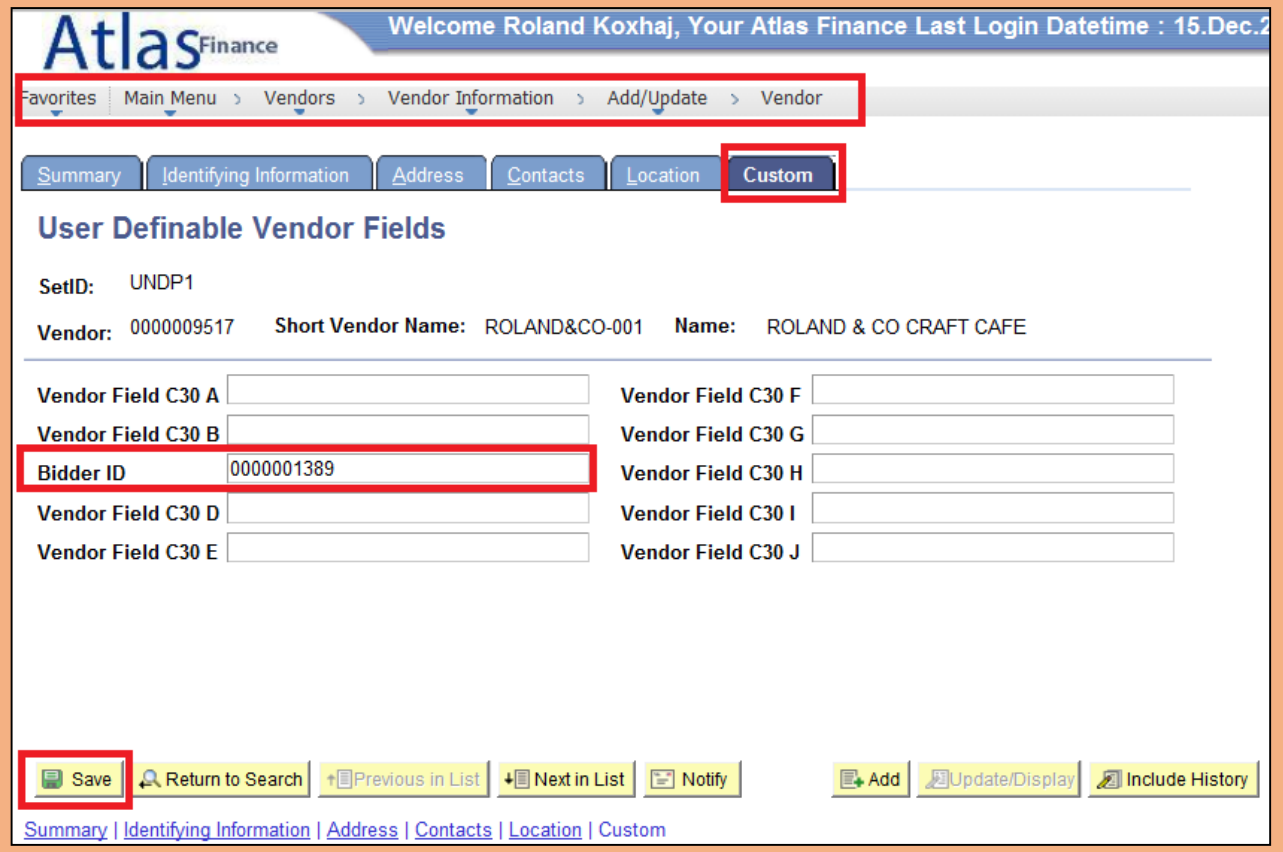
Click to return to Tender Award main section

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.

FAQ

Click to return to Tender Award main section

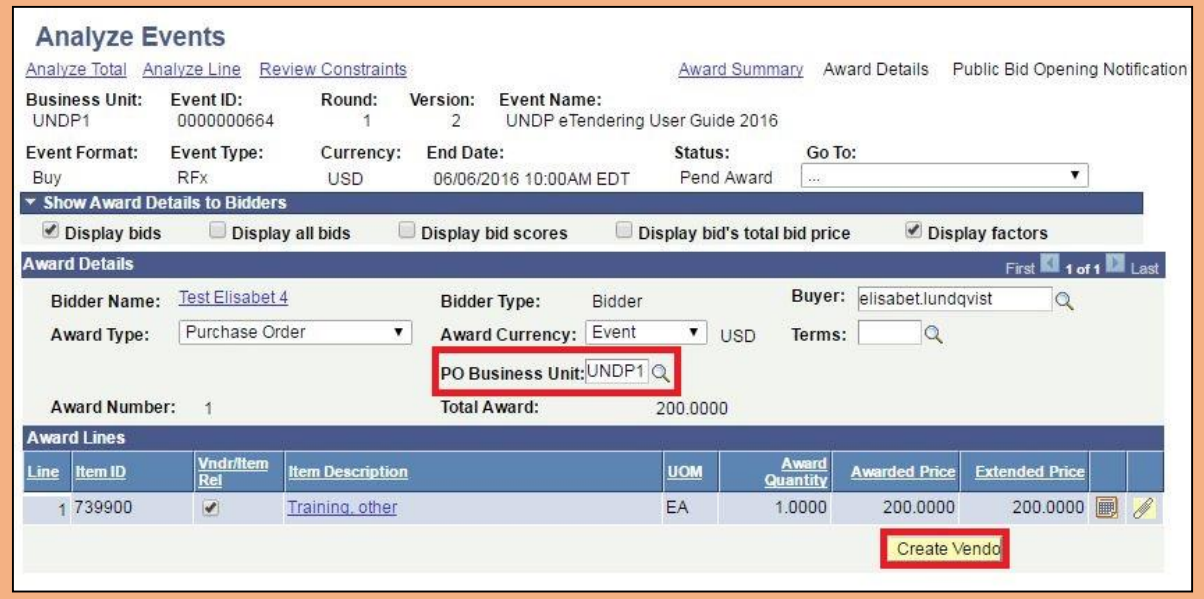
7.3 Create vendor & Purchase Order

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*.**

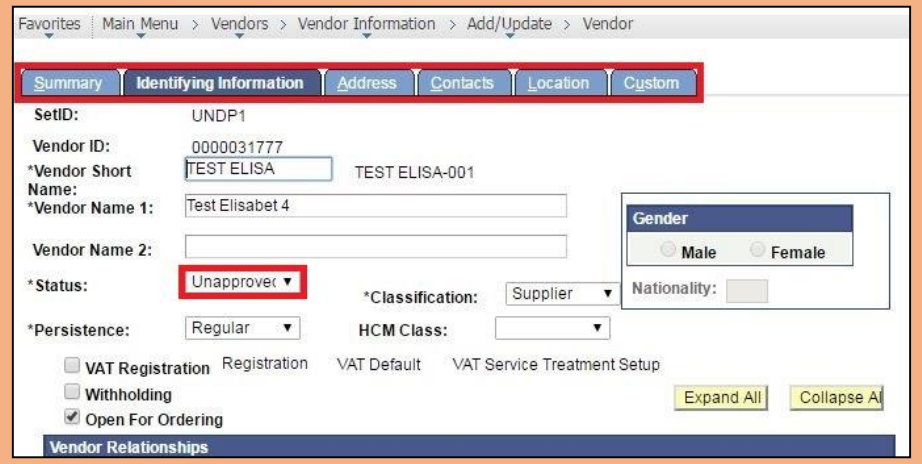
Note down the vendor ID and click ***OK***.





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.



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

Click to return to Tender Award main section

7.3 Create vendor & Purchase Order

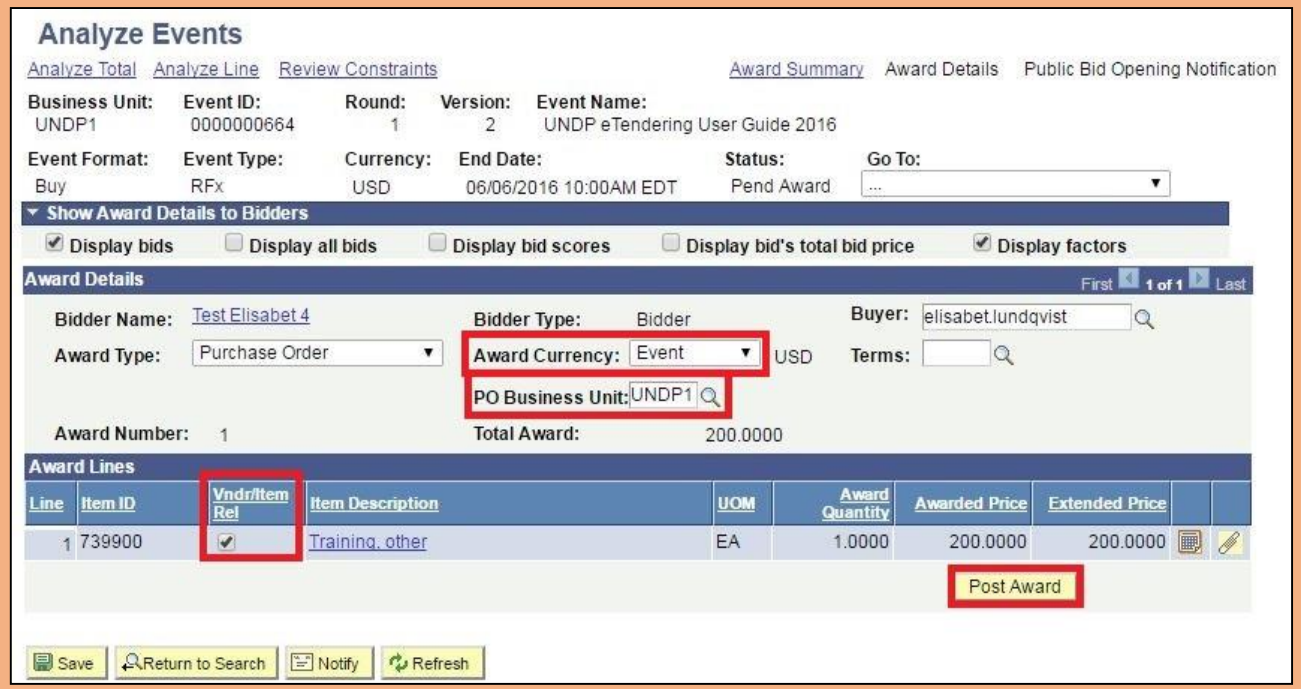
When the **vendr/Item Rel** box is ticked, the vendor will be linked to the item ID in the procurement catalogue. This can serve as an important tool for the buyer to identify potential vendors for specific items. Therefore, it is important to pay due attention and use this link only when the product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

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".**

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。

هذا إخطار تلقائي مرسل من نظام العطاءات الإلكترونية لإخبارك بأنك قد حصلت على جائزه من العطاء المشار إليه أدناه. سيتم الإعلان على الموقع الإلكتروني لبرنامج الأمم المتحدة الإنمائي (UNDP) دولار أمريكي 100,00 عن الجائزه إذا كانت قيمتها تزيد عن: http://procurement-notices.undp.org/view_awards.cfm. إذا كنت تحتاج إلى مزيد من الاستيضاحات فالرجاء الاتصال بمركز التنسيق التابع لبرنامج UNDP المعني بتنسيق هذا العطاء.

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

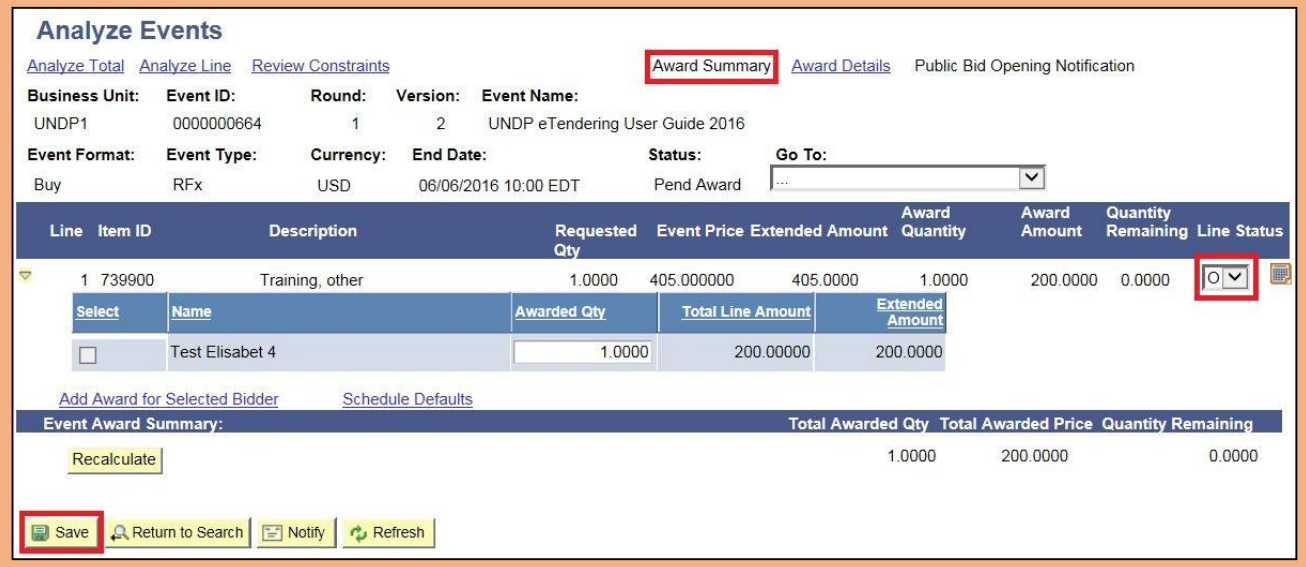
7.4 Close event manually (for no award or only partial award)

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.



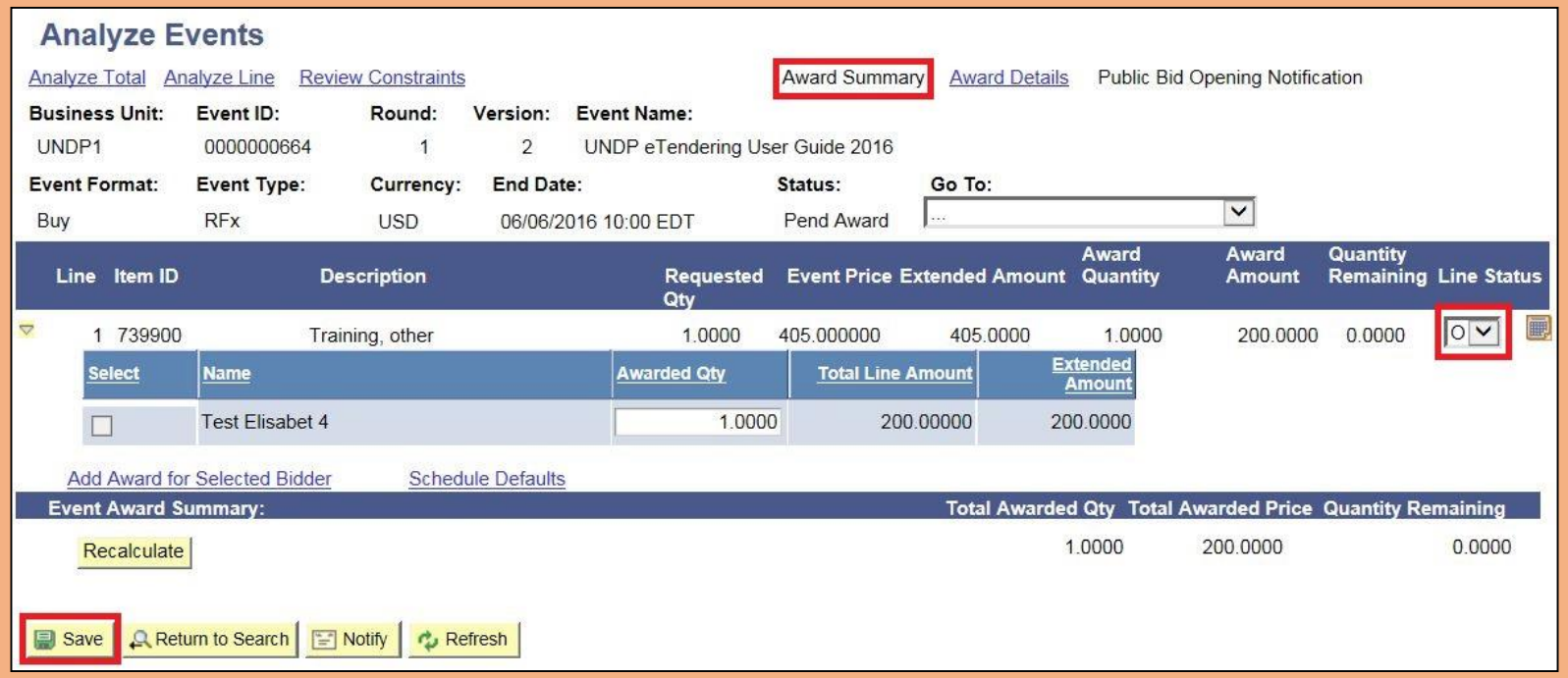
Closing of the event manually will trigger the system to send the non-award notifications to unsuccessful bidders. Therefore, the buyer must ensure that the correct award quantities are indicated before proceeding.

Click to return to Tender Award main section

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.



Click to return to Tender Award main section

8.0 eTendering Queries & Reports

Click to return to TOC

Several queries have been developed that capture and report and 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**	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. 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. Entering % in the country field will capture all bidders. If interested in bidders from a specific country only, enter country code in this field.
Event details; approver and event creator activity	**UN_EVENT_CREATE_DETAILS**	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. It captures also main information such as start and end dates, event title, etc.
Bidder Event Participation History	**UNDP_ETEND_BIDDER_RESP**	Captures which bidder has saved and/or posted a bid against a specific event, including time stamps. 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. ***This query is not available as a public query. Contact Emma Barredo to get access to it as an individual query.***

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**	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. Can be search by item ID or description. Recommend to split search in time periods to make the search results shorter and more manageable. ***This query is not available as a public query. Contact Emma Barredo to get access to it as an individual query.***

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**	Captures the information from eTendering events and Purchase Orders created from eTendering. Can be used to generate useful statistics. ***This query is not available as a public query. Contact Emma Barredo to get access to it as an individual query.***
eTendering event data	**UNDP_ETENDERING_DETAILS_9**	Captures all data related to issued events. Can be used to generate useful statistics on the usage of eTendering. Further data processing is needed. ***This query is not available as a public query. Contact Emma Barredo to get access to it as an individual query.***

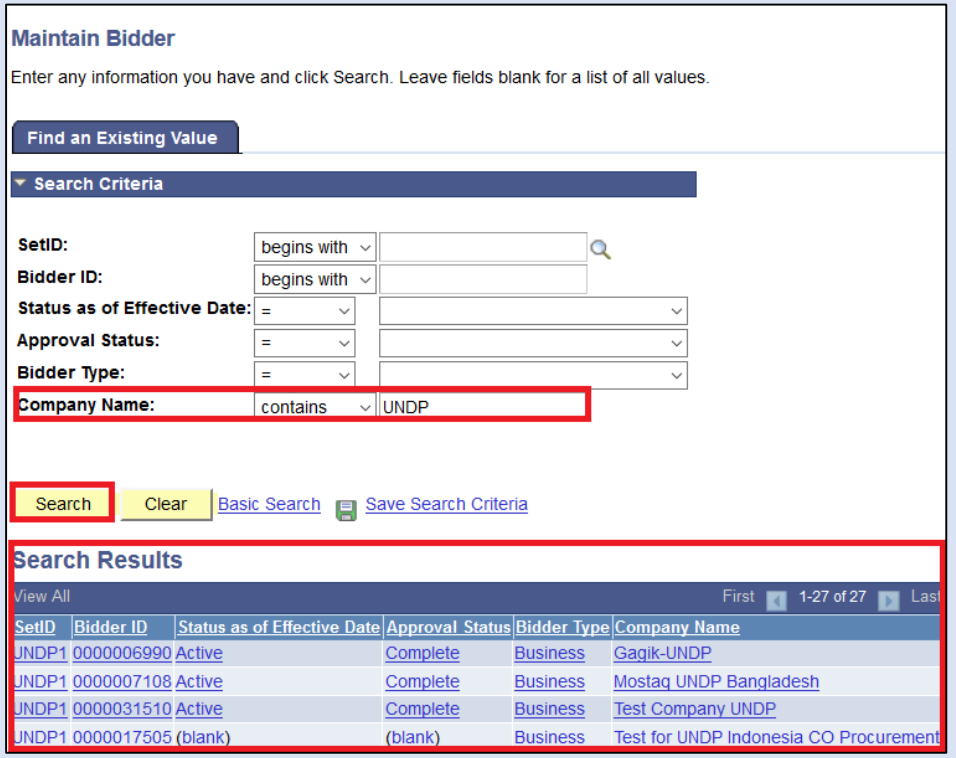
Click to return to Queries main section

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.***

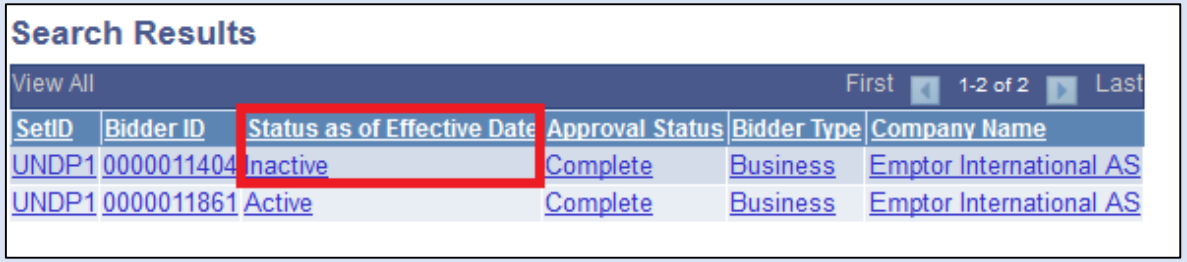
Search for the Bidder by using the ***Company Name*** field and selecting the **"contains"** filter. Enter part or all of the company name here and then click on "***Search"***. The results will be displayed as shown below.



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.



Click to return to Queries main section

8.5 Review Bidder Profiles & Search Bidder Activity

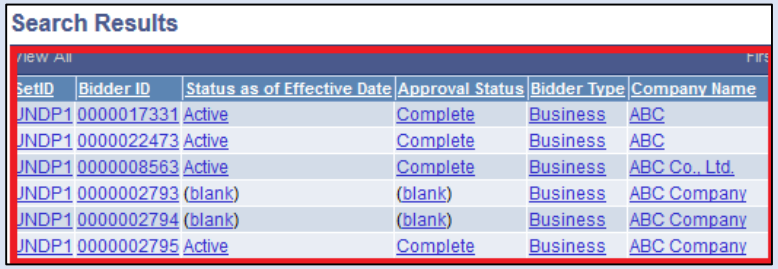
Review and Update Bidder Profile Information

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

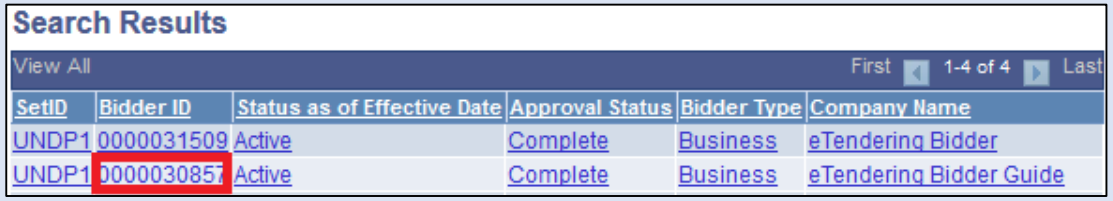
To review the Bidder Address details or add a new address, click on the ***Addresses*** tab. To review and update the User contact information, or add a new User, click on the ***Contacts t***ab.

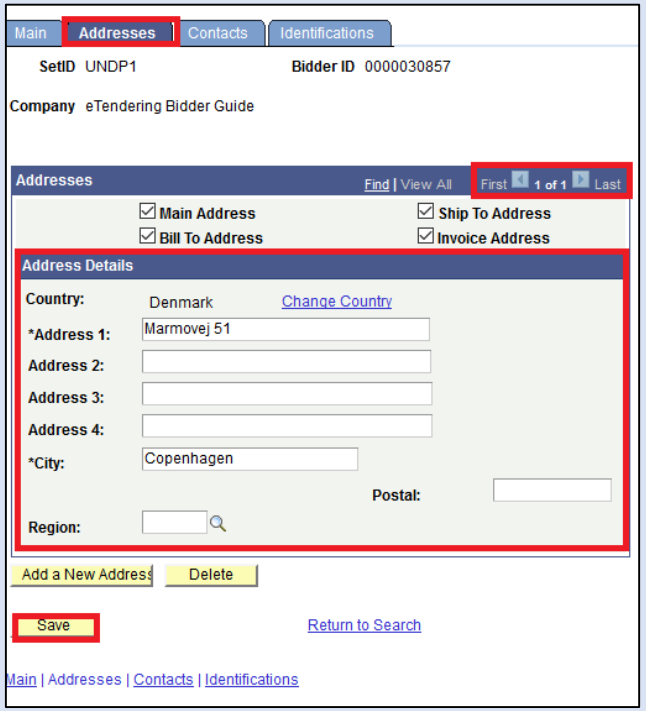
Important: Although Buyers are able to modify Bidder profile details, it is recommended that Bidders make this change directly themselves on eTendering. For more information on how, click on the FAQ icon on this page.

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



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FAQ

8.5 Review Bidder Profiles & Search Bidder Activity

Search Bidder Activity

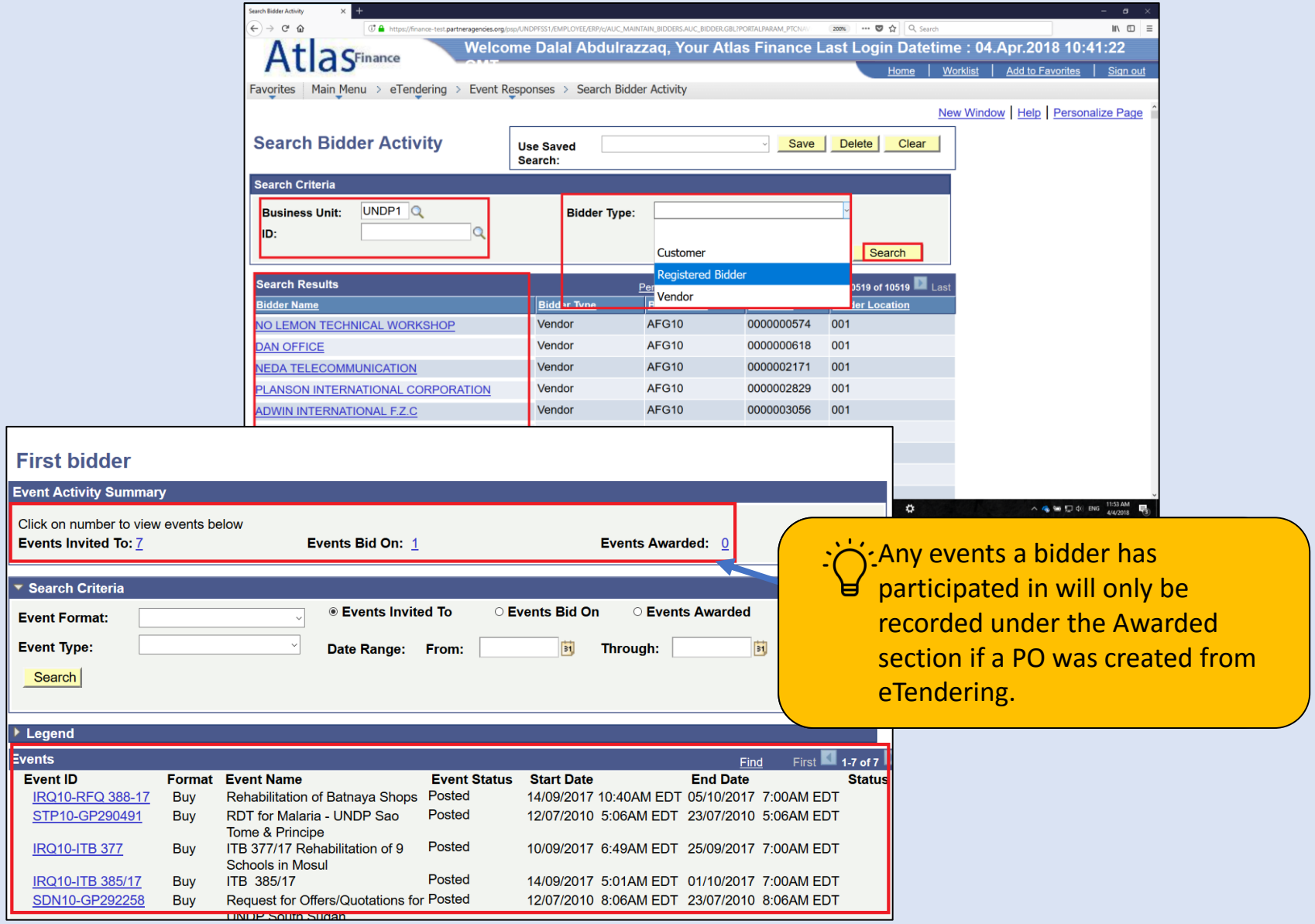
To search a Bidder's Activity, go to ***eTendering → Event Responses → Search Bidder Activity.***

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.



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

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9.0 Helpdesk Support and FAQs

Click to return to TOC

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-notices/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.

Click to return to Help desk Support and FAQ main page

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.

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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.

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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**.**

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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.

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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.



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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 automatically 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.



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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.

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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.



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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.

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