Guidance on How to Provide Support to Bidders

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Objectives of the guidance document

✓ Increase the capacity in the UNDP Country Offices for supporting bidders, conducting basic analysis and resolving basic eTendering related issues.

✓ Decrease/Reduce the response time for addressing and resolving bidders' issues. Streamline the escalation routs for different eTendering related issues.

Content summary

Covers most frequently occurring issues and questions from bidders, mainly in the areas of:

✓ Getting support on the system;

✓ Bidder registration process;

✓ Login and access issues;

✓ Maintaining bidders' profile in the system;

✓ Submit a bid and verifying its status.

Getting support on the system

Bidders can get support on how to use the system following the steps as per the order below:

➢ Consult user guides on the system, available publicly for bidders at:
https://www.undp.org/content/undp/en/home/operations/procurement/business/procurement-notices/resources/

➢ **Contact focal point for the Tender and/or procurement office which has launched the Tender bidder is interested to participate**. Bidders must not contact PS support or other contacts directly. When contacting UNDP bidder must provide detailed information on the issue, including:
   o Username, company name, and/or other information on the company;
   o Event details for which they are interested to participate;
   o Description of the issue, including steps followed in the system until the issue occurred;
   o Screenshots of any error or warning messages.

➢ Procurement officer managing the Tender reviews the incident report from bidder and provides support as possible. Procurement office should consult the following to help him/her with understanding the issue and providing solution:
   o This guidance webinar/document;
   o Bidders user guide, especially Helpdesk support section;
   o Consult internally with other colleagues in the office, in particular eTendering focal point if applicable;
   o User guide for buyers and other documents available at:
     https://undp.sharepoint.com/teams/eTendering

➢ If not able to solve the issue, contact PS support if a technical issue to be addressed by them, as explained in this guide, or eTendering support team. ***Important note: do not copy bidders and do not share with bidders email addresses of PS support and eTendering support***.

Bidder registration

1. How to search the bidders' database? What is Bidder ID? What is user ID? What is Approval Status of a bidder profile?

Bidders sometime may ask for this information. Additionally, buyers may need to find this information in order to solve some of the issues below.

Bidders normally have access to view most and edit some of this information once they log in and navigate to "My bidder profile" menu link – section 5.2 in user guide for bidders.

In case they cannot log in the system and request UNDP for this information, buyer can access this by navigating to eTendering>>Event Response>>Maintain bidder, and search for bidder profile. Most practical way is to search company name.

Tips: filter as "Contains"; try partial name of the company; note approval status as "blank"; crosscheck contact details and email address to verify and match profile with requester.

2. Bidder cannot complete registration because company name and/or username already exists.

i. Check bidder database to see if company has a complete and valid profile in the system. Note approval status.

Scenario a: company has a record/profile that is not complete – status Blank:

Action: Advise company to initiate a new registration, but slightly change the name of the company (add country name in the end or similar) and the user ID entered in the previous registration attempts.

Scenario b: Company has <u>only one</u> complete and active profile (approval status shows completed, and status set as "active"):

Action: request PS support to activate the user ID associated with the bidder's profile, providing user ID and bidder ID. Advise company that they will receive an email with a new temporary password to the email associated with their account and share tips on how they can reset password.

Scenario c: Company has <u>more than one</u> complete profile with status set as "Active":

Action: Duplicate profiles should be deactivated. Forward request to eTendering support team (etendering.support@undp.org). Do not share this email with bidders.

3. Bidder cannot complete registration, receives some system error messages they do not understand.

<u>Action</u>: Ask the bidder to provide a screenshot from the error message. Usually this happens when bidder does not complete correctly some of the fields during registration process. Most typical errors are:

- Wrong value for telephone number;
- Incorrect or missing values in one of the address fields;
- Not linking any of the contacts with the primary address. At least one contact must be linked with primary address.

Advise bidder to start registration process again, emphasizing on the above-mentioned tips, and to follow instructions in the user guide and videos.

Log in issues with bidders

4. Bidder receives message that account is not active or that account is locked due to inactivity

Typical error messages that appear:

"Sorry, Your Account has been Locked due to inactivity, Please Contact your Security Administrator"

'Sorry, Your Account has been purposefully Locked, For further information, Please Contact your Security Administrator !'

Account Information

you cannot access your account because you have exceeded the limit of login attempts.
Please contact your Security Administrator or Help Desk.

'Your User Name and/or Password were not recognized'

Scenario a: Bidder provides username and email address associate with his account/

<u>Actions</u>:
- ➤ **Request PS support** to activate username associated with the email address;
- ➤ Once PS support confirms action is taken, confirm to bidder that they will receive a new password and advise them to follow the steps for resetting password: Action 4 in bidder registration process, section 4 of the user guide for bidders. Stress the importance to avoid the copy/paste option and manually re-type the received temporary password.

Scenario b: Bidder does not remember username and/or email address, or PS support cannot find username as shared by bidder:

<u>Actions</u>:

- Search for company profile in the bidders' database to find user ID, email addresses, and other information;
  - In case of single user ID, **request PS Support** to activate that user ID;
  - In case of multiple user IDs associated with the same bidder profile, ask the bidder to confirm which user ID(s) they wish to activate. Then, **request PS Support** to activate the user ID.
  - In case of multiple bidder profiles with status set as "active" with the same Company name, contact eTendering support.
- Once PS support confirms action is taken, confirm to bidder that they will receive a new password and advise them to follow the steps for resetting password: Action 4 in bidder registration process, section 4 of the user guide for bidders. Stress the importance to avoid the copy/paste option and manually re-type the received temporary password.

5. Bidder does not remember password, or password is locked due to too many failed attempts.

Actions:

- Advise bidder to use the *Forgotten Password* link and follow steps as per the instructions in user guide, section 6.4;
- If the *Forgotten Password* option does not help, **request PS Support** to activate the user ID and provide a temporary password to the user.

6. Bidder does not remember username and password.

- Check bidder database to find the company name, and the associate user ID and e-mail address.
- Provide information to bidder and advise them to use forgotten password link to reset the password.
- If they do not remember answer to secret question, **request PS support to reset password.**
- If they receive message that account is inactive, **request PS support** to re-activate the account.

7. Bidder received new password but still cannot log in.
Usually this is due to bidder not following the instructions on how to reset the password. Advise them to:

- clear the cache of the internet browser before they try login the system or use different browser;
- Log in to the system with username and the temporary password. Do not click on "change password" link at start page;
- avoid copy/paste option and to manually re-type the received new password;
- Emphasize on password requirement;

➢ Refer to user guide, action 4, section 4. And videos on how to register and reset password.

Updating bidders' info

8. Bidder can login the system and wants to change the profile information in the system, names, telephone numbers, email addresses.

➢ Advise bidder to login the system and update the info following the steps in section 5.2 in the user guide for bidders.
➢ Advise bidder to keep one common email address linked with their profile, refer to "Brief guide document for bidders".

9. Bidder wants to change the username associated with the account.

➢ Explain to the bidder that changing the user ID is not possible.

10. Bidder wants to change email address associated with the profile but cannot access the system and does not have control on the e-mail address associated with their user ID.

➢ Forward request to eTendering support.

Submitting a bid/Verifying bid's status

11. Bidder is searching for a Public Event but cannot find it.

There can be different reasons for this, most typically:

➢ Bidder has incorrect search filters. For example, search with wrong event ID, wrong event name, etc. Advise bidder to follow instructions in section 2.1 of the user guide or the video section on how to search for Tenders.
➢ The preview and/or start date of the event are set in the future (check this setting in the event as buyer). If this is the case, create and post a new version of the event to correct the preview and start date.
➢ Tender is based on limited competition, only for invited bidders, and bidder is not supposed to access Tender. In this case, inform bidder accordingly. If the event is supposed to be public, create and post a new version of the event to make it public.

12. Bidder is invited in a limited competition tender but they cannot see the event.

- ➢ Ask the bidder to confirm which is the user ID and/or profile they are they are using to login the system;
- ➢ Search bidder database in the system to verify whether the company has multiple profiles in the system. Identify the bidder profile to which the user ID (confirmed by the bidder) is associated;
- ➢ Verify if that bidder profile is the one selected/invited on the event;
- ➢ If not, create a new version of the event to delete the erroneously selected bidder ID and add the correct bidder ID in the invited bidders section;
- ➢ Inform the bidder that the duplicated bidder profile(s) will be discontinued;
- ➢ Contact the eTendering support team to discontinue the duplicated profile

13. Bidder cannot upload attachments while preparing the bid response.

Some of the most typical reasons:

- ➢ Large file size. Advise bidder to not upload files or zip folders exceeding 50mb.

- ➢ If the error message says "Attachment failed to upload. (18036,10013) Attachment operation failed for unknown reasons. (Attachment built-in error 12). (18036,10003)", explain to the bidder that the name of the files (attachments) and the text entered in the "Attachment Description" field can only contain up to 60 characters, and cannot contain special characters or letters from any other alphabet other than the English one.

- ➢ ff the error message says "XML Upload Error - Incorrect XML File - The XML file being uploaded does not correspond to this event", explain to the bidder the purpose of the "Upload XML Bid Response" option which is for offline preparation of bid responses as per section 2.4 in the user guide. Explain to the bidder how/where to upload the files which are part of the bid response as per section 2.2 of the user guide.

- ➢ Bidder gets error message of data inconsistency errors. Typically this happens when bidder has posted a bid and then immediately goes to edit the posted bid within few seconds. Advise bidder to logout of the system and then log back and try to edit bid response and upload the additional files.

- ➢ If none of the above solves the issues, ask bidder to share screenshots showing all the steps they follow, and the error messages they received, and forward the information to eTendering support team.

14. The bidder asks to confirm if the bid was successfully submitted.

- ➢ Inform bidder that they can check status of their bids directly in the system: *Manage Events and Place Bids > My Event Activity > Events Bid On,* then click on the relevant Event ID. On the *Event Details* page click on *View, Edit or Copy From Saved Bids* and

verify the status of the bid in the column "Bid Status". Refer to section 3.1 of the user guide for bidders.

➢ Alternatively, buyer can verify if a bidder submitted a bid, the status of the bid (saved, posted or cancelled) from buyer's side of the system in one of the following ways:

   o View bid history page, from event workbench. Refer to user guide for detailed instructions.
   o Through the query UNDP_ETEND_BIDDER_RESP. If you do not have access to this query, send an e-mail to emma.barredo@undp.org and request access to be granted.

15. Bidder claims that they have submitted a bid, but their name/bid is not among the bid received as shown in the system, or in the public bid opening report.

➢ Request bidder to:
   o Verify the status of their bid (as previously explained) and send a screenshot from the related page;
   o provide the Bid Confirmation e-mail that system generates after successful submission of a bid.

➢ Run the query UNDP_ETEND_BIDDER_RESP. If you do not have access to this query, send an e-mail to emma.barredo@undp.org and request access to be granted. This query will show the status of the bid (saved, posted, or cancelled), and when it was last saved or posted. Normally this should match with system information that bidder will check from their end.

➢ Once information is provided, respond to bidder based on findings. Typically bidder has either never posted the bid (only saved) and in this case there will be no timestamp for bid posted action in the query, or after having posted the bid, had gone back to edit it, but then only saving and not re-submitting it, which withdraws original bid, in this case time of last saved will be after time of post in the query. Refer bidder to user guide instructions on what happens when a bid is saved for later.

➢ If bidder still insists that they posted a bid and UNDP has to consider it, contact eTendering support team and Regional Procurement adviser for advise.