UNFPA eTendering

Manual for Bidders

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Common Definitions:

Bid	A submission of an offer on an event.
Bid Factor	Bid requirements and evaluation criteria, that may or may not be cost-related, which factors into the award of an event. Bid factors can be of pass or fail or can be assigned weightings and used to determine the best qualified bid. Examples of bid factors include price, product warranties, service level agreements, and defect ratings, among many others.
Bidder	Anyone registered to place a bid on an event. The term bidder applies whether it is a sell event (i.e. when UNFPA is selling goods) or a buy event (i.e. when UNFPA is the buyer).
Business Unit	An identification code that represents a high-level organization of business information usually representing an UNFPA Country Office or HQ department.
Buy Event	In a buy event, UNFPA wants to buy goods or services. In addition to price, the creator may specify other bid factors and assign weightings, which factors into the award decision. Bidders must submit their bids, including responses to the bid factors, by a specified End Date after which time the bids are evaluated and the event is awarded. In eTendering, there are three types of buy events: 1) Auction: Also known as a reverse auction. All bids are visible to all bidders. Bidders can enter multiple bids, to beat the current highest-scoring bid. 2) Sealed RFx: Similar to a RFx event, yet also restricts the event creator from viewing the bids until after the event has ended. It is used by UNFPA for Invitation to Bid (ITB) and request for Proposals (RFP) type of processes (as well as for some Request for Quotations (RFQs) and secondary bidding processes).
End Date	The date and time the event closes meaning that bids are no longer accepted.
Event Creator	The originator of the event in the system.
Factor Type	The type of information being requested on the bid factor, such as monetary, numeric, date, text, yes/no, or list.
Preview Date	The time available before an event's start date. During preview, bidders may view the event, and may enter bid data into the system but will not be able to submit their bid.

	Having a preview time for an event is optional.
Public Event	An event on which any person or organization may bid.
RFx	A request for information or request for quote event in which each bidder bids once; bidders cannot see each others' bids and scores.
SetID	An identification code that represents a set of control table information or tablesets. A tableset is a group of tables (records) necessary to define your organization's structure and processing options.
Start Date	The date and time at which the event becomes open for bidding.
User ID	The system identifier for the individual who generates a transaction.
Weighting	Both bid factors and line items may be assigned with weightings to reflect their level of importance. Weighting may be used to analyze and score bids.

1. UNFPA bids & the new eTendering system

UNFPA bids are open to international competition and public procurement notices are posted on United Nations Global Marketplace (UNGM), per UNFPA Procurement Procedures.

UNFPA is now shifting to an eTendering system, which will be used to conduct, evaluate and award bids. While bids will be launched within the new online system, procurement opportunities are still open to all suppliers, regardless of whether they have done business with UNFPA in the past or not.

If you have not done business with UNFPA before, or have put forward offers on UNFPA bids in the past, but have not been set up as a vendor, you can bid on UNFPA tender events by registering as a Bidder User.

If you are already a UNFPA vendor, you should register as a Supplier User and instructions on this process are available in the eSupplier Connection manual.

1.1 Register as a Bidder User

Please note that Internet Explorer is the best browser to use for this application. Also please make sure all cookies browser cache is deleted before clicking on the link.

To start, log in to the Supplier portal with external generic user ID:

- Website: https://etendering.partneragencies.org

- User id: unfpa.guest

- Password: why2change

On next page you will see a login pagelet. Click on the **Register as a Sourcing Bidder** link.

IMPORTANT NOTE: When you reach this screen, you may have the ability to view current bids prior to completing the registration process. It is <u>imperative</u> that you continue through the full registration process prior to viewing a bid, accepting an invitation to bid, or submitting a formal offer. If you submit a bid prior to completing the full registration process, your company name will not be known to the buyer, the offer will not be recorded correctly in the system, and it will be disqualified at the evaluation stage.

In Step 1 of the registration process, you will be asked to complete the Preliminary Information section. Under number 2, be sure to choose **Selling goods/services**, instead of the other two options.

In Step 2, you will set up your user account. The preferred naming convention for usernames is first name separated by a period and then last name (firstname.lastname). If more than one person in your organization will be involved with the bids, you can create more than one user account by clicking on **Save and Add Another User**. If not, just click **Next** when you have completed filling in all fields.

Bidder Registration

Step 2 of 6: User Account Setup

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

* Required Field

*Company Name My Company Inc.

URLID: http://

User Information

*First Name Elizabeth   🗑 Delete

*Last Name Windsor

Title

*Email ID ewindsor@mycompany.com

*Telephone 888-383-6818   Ext

Fax

*User ID elizabeth.windsor   (User's account login name.)

Save and Add Another User

<< Back   Next >>   Cancel Registration

In step 3, you will be prompted to enter your company's primary address. When you have completed filling in a fields, click **Next.**

Bidder Registration

Step 3 of 6: Primary Address

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

* Required Field

Primary Address

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

Country: United States   Change Country

*Address 1: 16 Buckingham Road
Address 2:
Address 3:
*City: New Windsor
County:
*State: NY   **Postal:** 12533

\<< Back   Next >>   Cancel Registration

In step 4, you will be asked to enter other account addresses. If your company's invoicing address is different than the physical address, you need to check the box next to **Invoice Address**, then click **Next.** The system will prompt you to add the additional address.

If your company has only one address, do not check any boxes and simply click **Next**.

Bidder Registration
Step 4 of 6: Other Account Addresses

* **Required Field**

The Primary Address you have entered for My Company Inc. is:

16 Buckingham Road
New Windsor, New York 12533, United States

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

Other Account Addresses

Because you will be bidding on events as a seller of goods/services, you must provide an Invoice address.

Check boxes below to indicate addresses that are different from your Primary Address:

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

[<< Back]   [Next >>]   [Cancel Registration]

In step 5 you will be asked to assign your company contact(s) to the addresses entered in the previous steps. Once assigned, click **Next**.

Bidder Registration
Step 5 of 6: Address Contacts

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

User Name	Designate as Contact for
Elizabeth Windsor	Primary Address ▾

[<< Back]   [Next >>]   [Cancel Registration]

Step 6 is the final step, in which all bidders must review and accept UNFPA's Terms and Conditions for use of this website.

*Please note that these terms and conditions should not be confused with the General Conditions of Contract that govern UNFPA bids and contracts. The terms and conditions agreed to here indicate that

the company registering as a bidder has read and agrees to accept the terms of use of the bidder's website.

Tick the checkbox to indicate your agreement, then click on **Finish.**

Bidder Registration

Step 6 of 6: Terms and Conditions

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

* Required Field

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

> 1. 1. Terms and Conditions of Use of the Web Site:
> The use of this web site constitutes agreement with the following terms and conditions:
> (a) The UNFPA maintains this web site (the "Site") as a courtesy to those who may choose to access the Site ("Users"). The information presented herein is for informative purposes only. The UNFPA grants permission to Users to visit the Site and to download and copy the information, documents and materials (collectively, "Materials") from the Site for the User's personal, non-commercial use, without any right to resell or redistribute them or to compile or create derivative works therefrom, subject to the terms and conditions outlined below, and also subject to more specific restrictions that may

[<< Back] [Finish]   [Cancel Registration]

You will then be taken to the following screen, which confirms that your bidder registration was successful. Furthermore, within a few minutes you will receive an email from the system with a temporary password. This will allow you to log in and reset your password. Follow the link and the instructions in the email to finalize your user account.

Bidder Registration

Bidder registration for Test was successful.

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

[OK]

2. Viewing available bid events

Now that you are registered, each time you log in you will be able to see a list of bidding events issued by UNFPA. These will be listed in the **My Sell Events** section.

2.1 Accessing events

Click on the **Event Name** link for the intended eTendering event to see all details of the event. Please note that this pagelet only displays the first five events in the list, so to be sure you are able to see all open events, click on **See all my events.**

You will be taken into the event details page, where you can review the bid prior to determining whether or not you will place a bid, as well as to accept the invitation to bid and to enter your offer.

Key elements of the Event Details page are as follows:

Bidding Shortcuts: View Bidding Documents	Click here to view and download all solicitation documents associated with the bidding event: **Event Header Comments and Attachments** Event ID: 0000000566 Enter Comments First ◄ 1 of 1 ► Last **Comments:** Please review the following documents carefully: Section I: Instructions to Bidders Section II: Technical Specifications and Schedule of Requirements Section III: UNFPA General Terms and Conditions Section IV: UNFPA Special Conditions for Contracts Section VI: Contract Forms (1. Purchase Order, 2. Long Term Agreement) Please complete and upload the following forms as part of your bid: Section V: Bid Forms 1. Bid confirmation form 2. Bid submission form 3. Bidder's identification form 4. Product item overview form 5. Countries of registration form 6. Price schedule form First ◄ 1-5 of 5 ► Last <table><tr><td>**Attached File**</td><td>**Attachment Description**</td></tr><tr><td>1 0._ITB_UNFPA-CPH-12-056.pdf</td><td>ITB_UNFPA-CPH-12-056 🔍</td></tr><tr><td>2 4._Product_Item_Overview_Form.xlsx</td><td>Product_Item_Overview_Form 🔍</td></tr><tr><td>3 5._Countries_of_Registration_Form.xlsx</td><td>Countries_of_Registration_Forn 🔍</td></tr><tr><td>4 6._Price_Schedule_Form.doc</td><td>Price_Schedule_Form 🔍</td></tr><tr><td>5 AccessRH_Supplier_Agreement_Sample.pdf</td><td>AccessRH_Supplier_Agreemen 🔍</td></tr></table>OK Cancel Download solicitation documents by clicking on the magnifying glasses.
Event Start Date	This shows the date/time by which suppliers can start bidding on an event. When planning for your bid submission, take careful note that the time zone is always shown in EDT/EST, regardless of the location of the UNFPA office leading the bid.
Event End Date	This shows the latest date/time by which suppliers can submit a bid. When planning for your bid submission, take careful note that the time zone is always shown in EDT/EST, regardless of the location of the UNFPA office leading the bid. *It is important to note that some bids may have a preview period, in which suppliers can view the event, but during which bids cannot yet be submitted. ** It is also very important to complete your submission as far in advance of the deadline as possible. Once the deadline passes the system closes the bid and it will no longer be possible to submit an offer.
Event Description	Gives an overview of the bid requirements.
Email	The bid focal point's email address, to which suppliers can submit clarification questions. Click on the email link to submit your question.
Edits to Submitted Bids	Indicates whether or not suppliers will still have the ability to update/edit their submitted bid prior to the end date.

Multiple Bids	Indicates whether or not suppliers will be able to submit alternate bids. This will also be clearly addressed in the solicitation documents, which you will be able to download and review.

2.2 Accepting a bid invitation

If after reviewing the bid, you intend to submit an offer, click on **Accept Invitation**. It is very important to click on this button; if you have not accepted the invitation, you will not be notified via email on changes or clarifications that may be made to the bid event during the bidding period. Accepting an invitation does not bind bidders to eventually submit a bid.

You will then be taken back to the main page and will see the **View Events and Place Bids** search results. In the status column, you will see the **Status** column now shows as **Accepted**. Click on the link to return to the bid event.

2.3 Declining a bid invitation

When you return to the event, you will see the option to **Decline Event**. You will prompted by the system to enter comments explaining the reason to decline the bid. Complete the form and click **Continue** to return to the main screen.

Event Details

Decline Invitation

Bid on Event

Bidding Shortcuts: View Your Bid Activity
View Bidding Documents
Upload XML Bid Response

Decline Event Invitation

Event ID: 0000000566   Name: UNFPA/CPH/ITB/15/566

Please select a reason for declining this event invitation:

○

Please enter any additional comments:

Continue
Return to Event Search

If, after accepting the invitation, you choose to continue with submitting a bid, click **Bid on Event** to start your bid.

2.4 Notifications

It is important to note that the system does not send automatic notifications when an event is posted.

However, bidders who are invited directly through the system to participate in a bid event will receive an email notification containing all bid event attachments and a direct link to the bid event in the system.

Additionally, to ensure that bidding process are open to the public, UNFPA will continue to publish procurement notices on UNGM, and other media as relevant making reference to the eTendering system.

3. Submitting a bid

Once you click on **Bid on Event**, you will be taken to the main page of the bid. You will see the main event summary information and the line items that you were able to see prior to starting your bid.

3.1 Responding to event questions (bid factors)

In addition, you will also see a list of bid factors listed under **Event Questions**. (For a definition of bid factors, please refer to the Common Definitions section of this document).

If a weighting has been applied to the bid factors, this will be shown next to the question (in the screenshot below, no weightings have been applied).

Review each question and either select your response from the dropdown menu, or enter your response in the indicated field. The way you will be required to respond will depend on the question and how the bid factor is set up.

You may see one, both, or none of the following two icons next to the bid factors:

Bid Required	This means that a response to the bid factor/question is required. The system will not allow you to submit an offer until the response has been completed.
Ideal Response Required	This means that the buyer has set a required response for the bid factor. If you do not select the required response, the system will not allow you to submit an offer. This is most commonly used when the buyer has used yes/no bid factors.

In many cases, the bid factor will request you to upload documentation to support your response. Click on **Add Comments or Attachments**.

Click on **Upload** to add one document at time. To add additional documents, click on **Add New Attachments**. To remove an unwanted attachment, click on **Delete**.

In the **Add New Comments box**, you can also enter any additional comments related to the attached documentation or the bid factor itself that you want to bring to UNFPA's attention.

Click **OK**.

Repeat this process for all bid factors, as required and where applicable.

3.2. Enter bid line responses

When all bid factor responses are complete, scroll down to the next section: **Step 2: Enter Bid Line Responses**. The key details of this section are summarized in the table below.

Lines in This Event	Summarizes the number of lines included in the event.
Lines That Require a Response	Summarizes the number of lines for which a response is required.
⭐Bid Required	This means that a bid response is required. This system will not allow you to submit an offer until the response has been completed.
💬Line Comments/Files	This indicates that there are comments included/files attached to the price line for the supplier's attention. To access these comments/files, click on the bubble icon on the right. 💬

There are two ways to enter pricing information.

OPTION 1:

The simplest way is to do so directly in the **Your Unit Bid Price** box. Once the unit price is entered, the system will calculate both the total per line and the grand total of all lines.

In many cases, the quantity will be fixed and cannot be changed. Depending on how the bid has been set up, bidders may also have the possibility to update or input a new quantity. In cases where bidders are allowed to quote a quantity other than what has been requested in the bid, this will be clearly communicated in the solicitation documents.

It is important to check for documents and comments attached to/included on the price line. In order to view this, click on the white bubble at the end of the line. As well as being able to download attachments/view comments provided by UNFPA, you will also be able to upload your own attachments/add additional comments, following the same instruction as above (section 3.1).

OPTION 2:

The preferred way to enter your unit price, however, is to click on the **Bid** link (starred above) and to enter pricing information in the **Your Unit Bid Price** box from the line details page.

This is the preferred method, because in some cases there may be further bid factors associated with price lines that require response.

Following the same instructions listed earlier, enter your bid factor responses. You have the ability to add specific comments to your bid factor response by clicking on the **Add Comments** link.
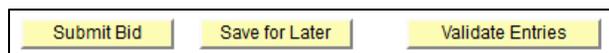
You also have the possibility to view any line documents uploaded or line comments added by UNFPA, by clicking on **View/Add Question Comments and Attachments,** as well as upload your own documents or add further comments.

3.3 Finalizing submission

When all responses have been entered and all supporting documentation uploaded, click **Validate Entries** at the bottom of the page. If everything has been entered correctly, you should receive the 'No errors found' message. Click **OK**.

Message

No errors found. (18058,313)

OK

Note that you can also **Save for Later** if you need more time to complete the bid. However, it is important to note that if you **Save for Later** your bid is not submitted. A bid is submitted only when you click on **Submit bid**.

Submit Bid   Save for Later   Validate Entries

When you have finalized your offer, click on **Submit Bid** to complete the bidding process. Congratulations! You have successfully submitted a bid via the UNFPA eSupplier Connection Portal. You will see the below bid confirmation message in your browser. You will also receive a confirmation email with a copy of the bid submitted.

Bid Confirmation

Your bid has been successfully submitted.

Bid ID:	1	**Bid Date:**	11/08/2015 2:32:28AM EDT	
Event ID:	0000000476	eSc Testing Event - Anu 2		
Event Format:	Sell Event	**Round:**	1	**Version:**	1
Start Date:	23/07/2015 7:52AM EDT	**End Date:**	19/09/2015 07:55 AM EDT	
Your Total Price:	1.00 USD			

OK   Copy Bid
.

To return to the list of bidding events, click on OK.

3.4 Alternative Bids

There are some cases where UNFPA will accept alternate bids. This information will be clearly communicated in the solicitation documents included in the event. In these cases, bidders will be allowed to submit more than one bid in the system, with one of them being the primary bid and the other/s being alternate bids. There are different methods of how to submit an alternate bid as described below:

3.4.1 Method 1: Submit an alternate bid directly

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

3.4.2 Method 2: Copy from previous bid

This method allows you to use the information submitted in your previous/original submitted bid and then make only necessary changes. To do so, click on **View, Edit, or Copy from Saved bids** and then click on the **Copy**. The system will prompt the bid already completed with same information as the original bid and you can then make necessary changes.

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

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

3.5 Submitting bids via XML files

You can prepare your response off-line outside the system and then upload it in the system when ready, using an XML file.

To do this first you need to download the XML version of the bid event by going to **View Event Package** and then downloading event bid Package in XML format. Once the page is downloaded, you must save it on your hard drive.

From there, open Excel and open the saved XML file from its hard drive location. You must open the XML file via the **Open File** menu in Excel and not by clicking on the XML file itself in the folder.

__Important note__: You can upload your bid using the XML feature only once. Once a bid has been posted, the XML file cannot override the bid information in the system. The only exception is when alternative bids are allowed. In this case, uploading your bid using XML file will create a new bid in the system.

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

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

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

4. Managing submitted bids

This section contains instructions on how to view, edit, or cancel a bid that has been already submitted.

4.1 View/edit bids

To view your bid prior to the event end date, click on **View Events and Place Bids** and select the corresponding Bid Event.

Then, click on **View, Edit or Copy from Saved Bids** from the main bid screen.

From the available options, click on **View/Edit**. This will allow you to verify the information you submitted.

While viewing the bid, you will also have the option to edit your bid up until the deadline. This will open the bid submitted and you can overwrite to make the necessary changes and submit again. *Important note*: *To submit an amended bid, bidder must click on "Submit bid". Otherwise, bid will not be posted in the system and will be considered as "not submitted."*

4.2 Cancel bids

If necessary, click on **Cancel** beside the bid you want to cancel.

You will be taken to the following screen, where you must click on **Cancel This Bid**.

Status will change to **Cancelled** as shown below and at the same time you will receive an email confirmation noting the cancellation.

4.3 Event amendments and updating your bid

If UNFPA amends the bid event and its requirements, an automatic email notification will be sent by the system to all bidders who have either accepted the bid invitation, have been invited directly by UNFPA, or who have already submitted a bid on the original version of the Bid Event.

The sections of the event that have been amended will be clearly communicated by the bid focal point.

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

1) **No changes made to line items or bid factors**

If no changes have been made to the bid factors or line items, bidders can follow the same steps for editing their bids by clicking on the **View/Edit** link and overwriting previously entered information. The bidder can also submit a new bid, in the same way as when submitting an alternate bid and cancelling the previous bid.

2) Changes made in line items or bid factors

If the amendment of the bid event includes changes in bid factors or line items, the bidder can neither edit a previous bid, nor copy it and create a new bid. If bidders click on the **View/Edit** or **Copy** links corresponding to the previous bid for the original version of the bid event, a system error will appear.

Rather, bidders must submit a new bid by clicking on **Submit Bid** link in the main page and cancel their previous bid (following the same instructions above for bid cancellation).

4.4. View Activity

The system records bidder activity. To view your bid activity, click on **My Event Activity**. You can click on the linked numbers at the top of the page to see summaries of events to which you have been invited, against which you have bid, or for which you have been awarded.

You can also use the various search filters to search for specific activity.

To view the complete information of a specific bid, click on the **Event Id** link.

From there it is possible to view/edit/copy/cancel bids as described above.