Join the digital transformation

User Guide to the e-Sourcing Platform

for suppliers
A STEP-BY-STEP GUIDE TO:

→ Access Tenders
○ Manage Tenders
↑ Prepare Responses
← Submit Responses
Depending on the type of the tender, you can access the offers in two different ways:

- If the event is **open to all suppliers**, you have to follow all the procedures described in the next slides to access the event through the UNGM portal.
- In case of **limited tenders**, you will be **invited to the event** through an email from the e-Sourcing system, with a link to direct you to the page of the event (see slide 10).

Once in the platform you will find the events in the section **My RFX** or in **My RFI/EOI** and, in case of an open event, click on the tab **RFX Open to all suppliers**.

Follow these steps to respond to an RFX or an RFI/EOI as the steps are identical for both processes.

*Please note that any reference to “Buyer” in this document is a reference to “WIPO”.*
ACCESS TENDERS open to all

From the United Nations Global Marketplace (UNGM) homepage
https://www.ungm.org/
→ click on "Business Opportunities".

Please note: To express interest or view tender documents, you will need an account on the UNGM website. Every tender will need to be accessed through this website. If you are not yet a registered supplier, you will need to register here at this point. Only basic registration in the UNGM is needed.
Once logged into the UNGM website, click on either **Tender notices** or **My tenders** on the menu on the left-hand side.

Clicking on **Tender notices** will enable you to see a list of ALL open tenders published by UN agencies.

Clicking on **My tenders** will show any tenders that you have been invited or attached to, along with any tenders for which you have expressed interest.
The **Search tender notices** page will appear. Use this feature to search Title, Description, Reference, Publish and Deadline dates.

Use the advanced search function to look for a specific UN agency, Beneficiary Country, UNSPSC Code, and Notice Type.

To access WIPO’s tender notices, click on the **Show more criteria** button at the top right of the page to view more filters.
In the field **UN Organization**, please select “**WIPO**” from the drop-down list. The system will automatically display active tender notices published by WIPO.

On the left side of each tender notice, you will find a **blue Express Interest** button if it is the first time you are seeing the notice.
Clicking on a notice through the icon you will see few tender details.

If you open the event, you can also click on the Express Interest button in the pop-up window that appears as shown here.
Once clicked, this **Express Interest** button changes to a **green View Documents** button. Click on this button to access the tender documents.

If you click on “**View documents**”, you will be redirected to the **UNGM Identity center**, where the UNGM credentials are requested in order to access WIPO e-Sourcing platform.
If you have been invited to the event, you will see the event on your UNGM dashboard, in the section **MY EXPRESSION OF INTEREST** where you only have to click on **View Documents**.

If you click on “View documents”, you will be redirected to the **UNGM Identity center**, where the UNGM credentials are requested in order to access WIPO e-Sourcing platform.
Please note: You remain logged in WIPO e-Sourcing platform for 30 days according to UNGM password and security rules. You will not be requested to re-enter your UNGM credentials during this period unless you log out from WIPO e-Sourcing platform, or you delete your cookies.

After entering the login details, your permission will be requested to transfer your user profile information to WIPO e-Sourcing platform.

Please note: This step is required only the first time you want to access WIPO e-Sourcing platform.
You will then be taken to WIPO e-Sourcing platform where you have to click on **Access Documents** to have access to all tender details.
Along with the RFX setting and project titles and codes, the RFX header displays the **closing date** and supplier submission date. If the response date has passed, this information will be highlighted in yellow.

If the buyer has provided attachments to the RFX, a link to the attachment(s) will be displayed prominently above the RFX navigation. This action link will take you to **RFX Details > Buyer Attachments** (nbr) area.
If there are more documents to be downloaded, click on the tab **Mass Download** to select and download all the documents.

Click on the icon to download and read a single document.
On the RFX page, you can choose to **Create Response** or to **Decline to Respond**.

If you choose to decline, you are presented with a comment field to **Enter Decline to Respond Reason Details**.
When you click **Create Response** in an RFX that has been configured to allow responses by Bidding Groups, a screen overlay appears.

You cannot close this overlay until you select one of the choices presented to indicate if you are bidding as a single organization or as a group. **WIPO only requires one of the first two top options.**
An RFX is composed of, at most, 3 response envelopes (Qualification, Technical, Commercial).

In the section **My Response Summary**, you can see which envelopes are configured and how many questions each envelope contains, and you are invited to answer all relevant/mandatory questions.

<table>
<thead>
<tr>
<th>My Response Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Qualification Response</td>
</tr>
<tr>
<td>2. Technical Response</td>
</tr>
<tr>
<td>3. Commercial Response</td>
</tr>
</tbody>
</table>
Click **Edit Response** for each envelope, completing the sections within the envelope and **ensure that you save your responses before moving to the next envelope**.

Mandatory questions are marked with an asterisk (*).

Upon completion of a section, click **Validate Response** to ensure that all mandatory questions are answered and that the responses provided are compliant with the required format.

Click **Save and Continue** to remain in the current envelope. Alternatively, click on **Save and Return** to exit the current envelope and navigate back to My Response.
Click the Online Questionnaire in Excel button to respond to the RFX offline.

- Clicking Download downloads the questionnaire in Excel format. The Excel file is opened locally so you can answer the questions. Cells for mandatory responses are color-coded yellow. Cells for optional responses are color-coded blue.
- When finished, save the file and return to the Export/Import Response page.
- Use the Choose File look-up to select your file, then click Import Excel to upload your response.
- The system will run a compliance check to ensure that there are no missing rows, invalid responses, or missing mandatory responses. If all validation checks pass, the platform will upload the file. If not, you will be prompted to correct the errors indicated by the system message and re-import the questionnaire.
- You will be returned to the My Response page where you can review your responses for accuracy and make any corrections if necessary. You have the option to Save Changes or to Undo All Changes and remove all responses.
You also have the possibility to communicate with WIPO through the tabbed section Messages.

Please note that if a buyer has set a date under End date for Suppliers to submit Clarifications Requests, ensure that all relevant communications are sent within the specified date.
When the response is complete, click **Submit Response** on the RFX Details > My Response page to submit your tender.

If any mandatory data is missing or invalid, a pop-up box will indicate the fields that must be corrected before the response can be submitted.

After the response is submitted, the response status will change from **Response to be Submitted to Buyer** to **Response Submitted to Buyer**.
You may edit or delete your responses at any time before the RFX's Closing Date and Time.

- To modify responses online, navigate to RFX Details > My Response and click Edit Response. When finished, you have the option to Keep Changes or to Discard Changes. Once all changes are complete, click on Submit Changes to finalize the modifications.

- To modify responses offline, download the Excel questionnaire, update your responses, and then import the questionnaire again into the system.

- To delete your response, navigate to RFX Details > My Response and click the Delete Response option in the More menu. Once confirmed, all previous responses will be deleted. You will return to the My Response page, where you will have the options to Create Response or Decline to Respond.
To view and save your response, you can download a PDF and print the file by clicking on the ellipsis ("...") at the top right. Click on **Printable view** and the following screen will appear:

![Printable View Image]

<table>
<thead>
<tr>
<th>User</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Supplier 2</td>
<td>26/03/2021 14:39:14 - Time Zone: CET - Central Europe Time</td>
</tr>
</tbody>
</table>

**Project Information**

<table>
<thead>
<tr>
<th>Project Code</th>
<th>Project Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>tender_20</td>
<td>eSourcing Test Two envelopes</td>
</tr>
</tbody>
</table>

**Response Status**

<table>
<thead>
<tr>
<th>Response Status</th>
<th>Last Submitted On</th>
</tr>
</thead>
<tbody>
<tr>
<td>Response Submitted To Buyer</td>
<td>26/03/2021 09:51:11</td>
</tr>
</tbody>
</table>
CONTACT & ASSISTANCE:

For additional information and assistance, you can contact the Jaggaer Helpdesk at:

**JAGGAER Advantage**

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