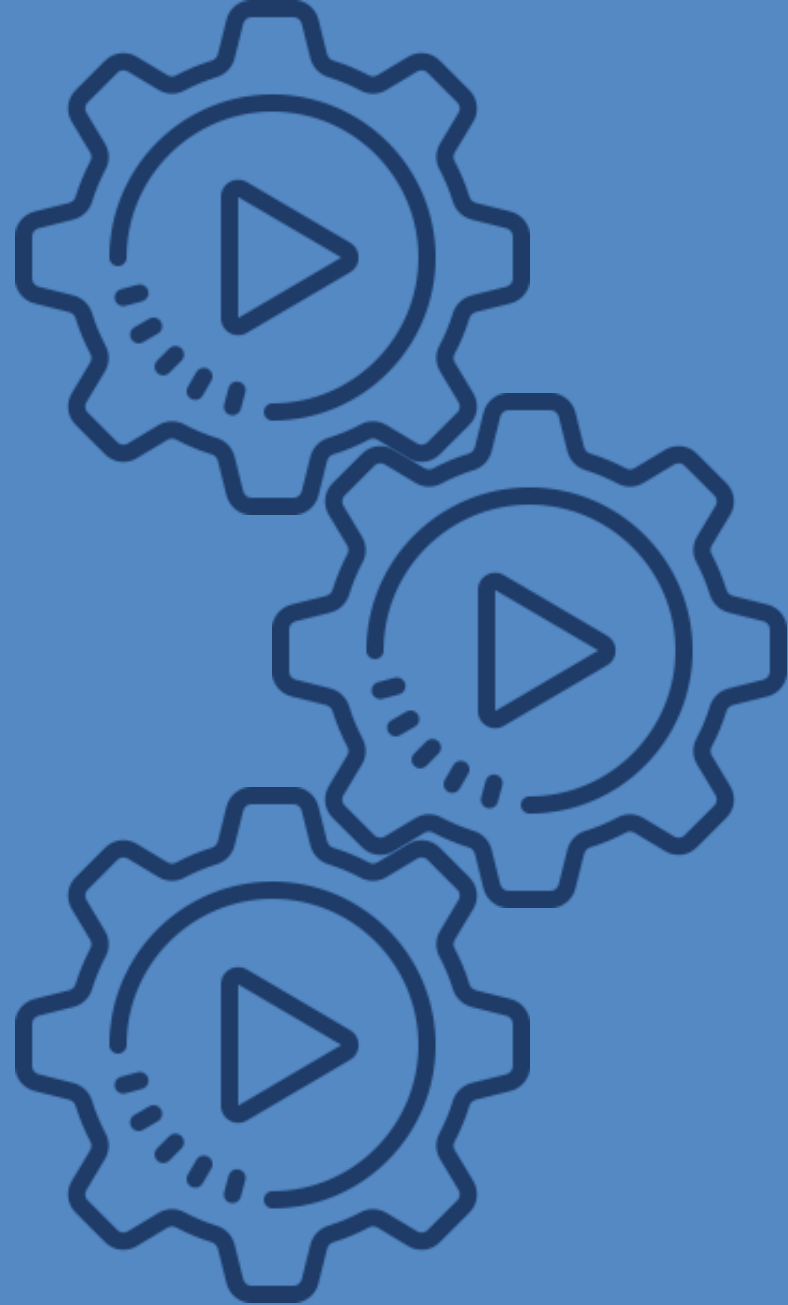# WIPO PROCUREMENT PROCESS

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

ACCESS TENDERS

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**".
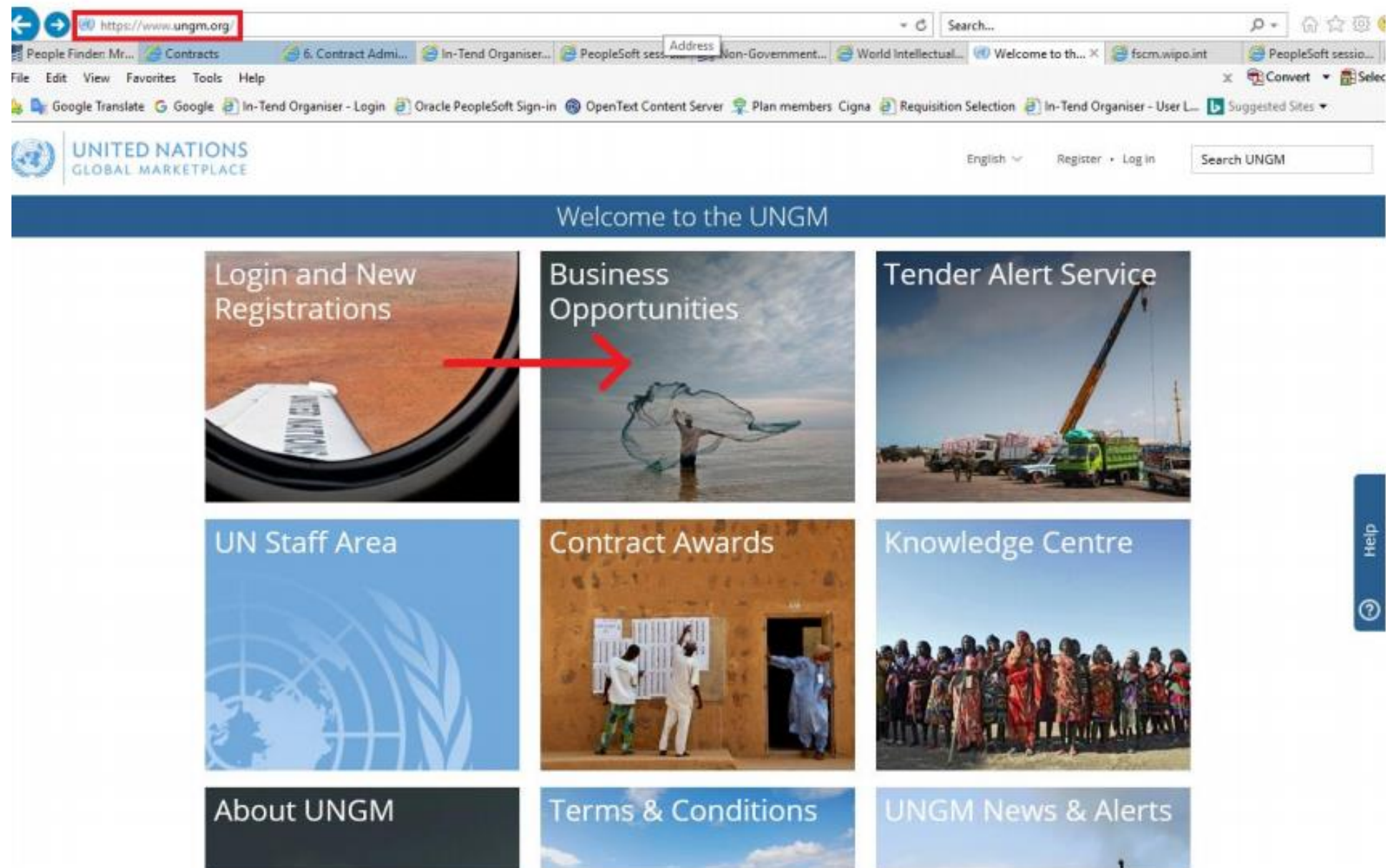
Please note: To express interest or view tender documents, you will need an account on the UNGM website. Every tender will need to be accessed through this website. If you are not yet a registered supplier, you will need to register here at this point. Only basic registration in the UNGM is needed.
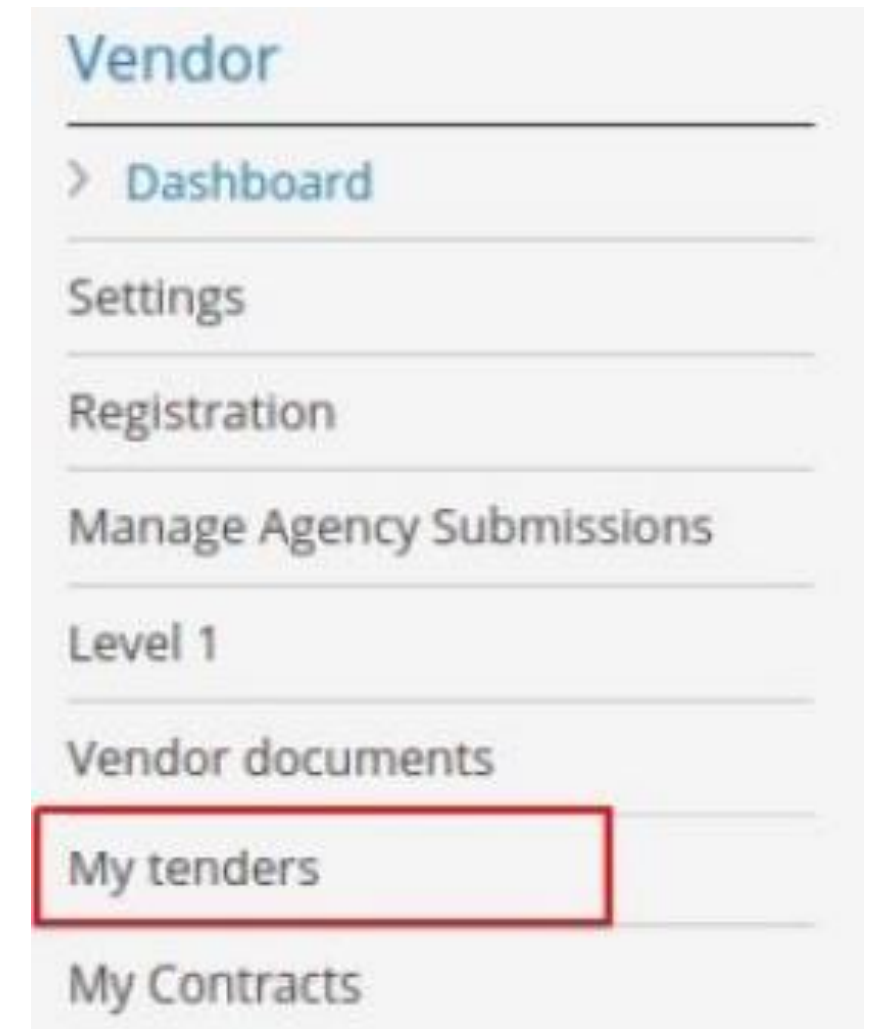
ACCESS TENDERS open to all

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.

Home
About UNGM
Registration process
Code of conduct
Terms & Conditions
Tender notices
Contract awards
Tender Alert Service
Knowledge centre

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.

Vendor
› Dashboard
Settings
Registration
Manage Agency Submissions
Level 1
Vendor documents
My tenders
My Contracts

ACCESS TENDERS open to all

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.
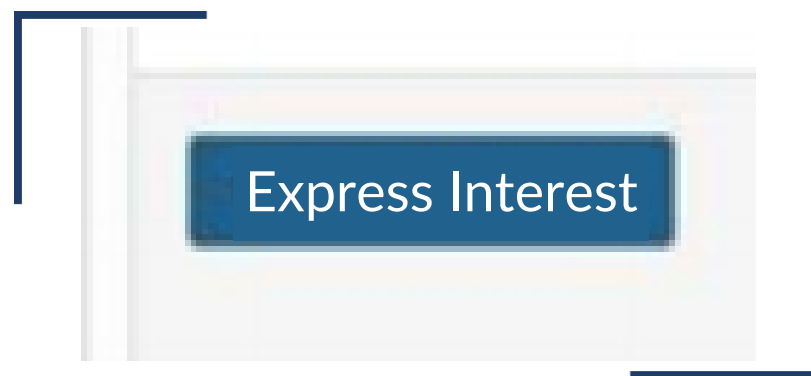
To access WIPO's tender notices, ➡ click on the **Show more criteria** button at the top right of the page to view more filters.

ACCESS WIPO'S TENDERS

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.

Express Interest

ACCESS TENDERS open to all

➡️ 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.

LTATest **Request for quotation**

Express Interest

Reference: rfx_284
Beneficiary country(ies): Multiple destinations (see 'Countries' tab below)
Registration level: Basic
Published on: 01-Apr-2021
Deadline on: 30-Apr-2021 16:00 0.00

Description

LTATest

| Contacts | Links | Countries | UNSPSC |

Once clicked, this **Express Interest** button changes to a **green View Documents** button. Click on this button to access the tender documents.
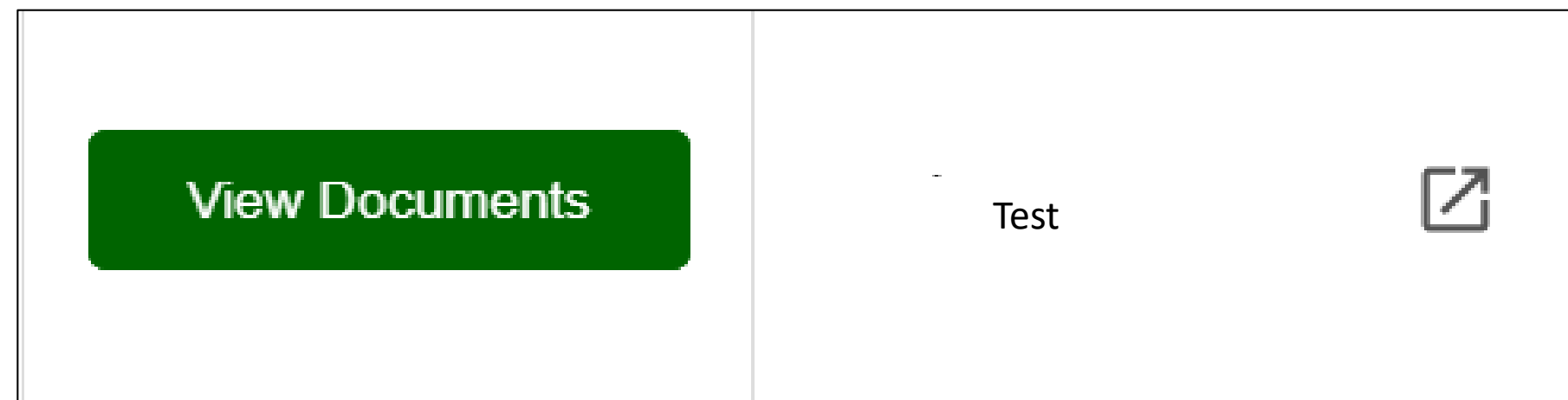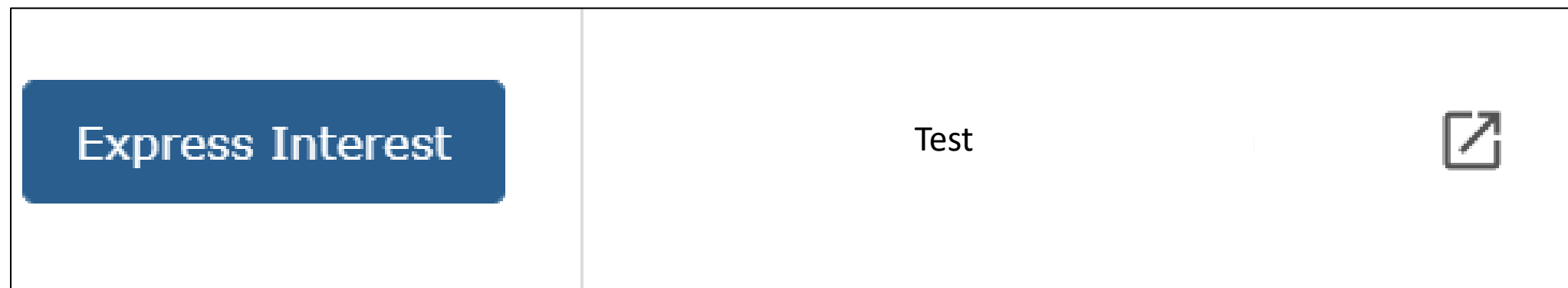
If you click on "**View documents**", you will be redirected to the **UNGM Identity center**, where the UNGM credentials are requested in order to access WIPO e-Sourcing platform.

ACCESS TENDERS on invitation

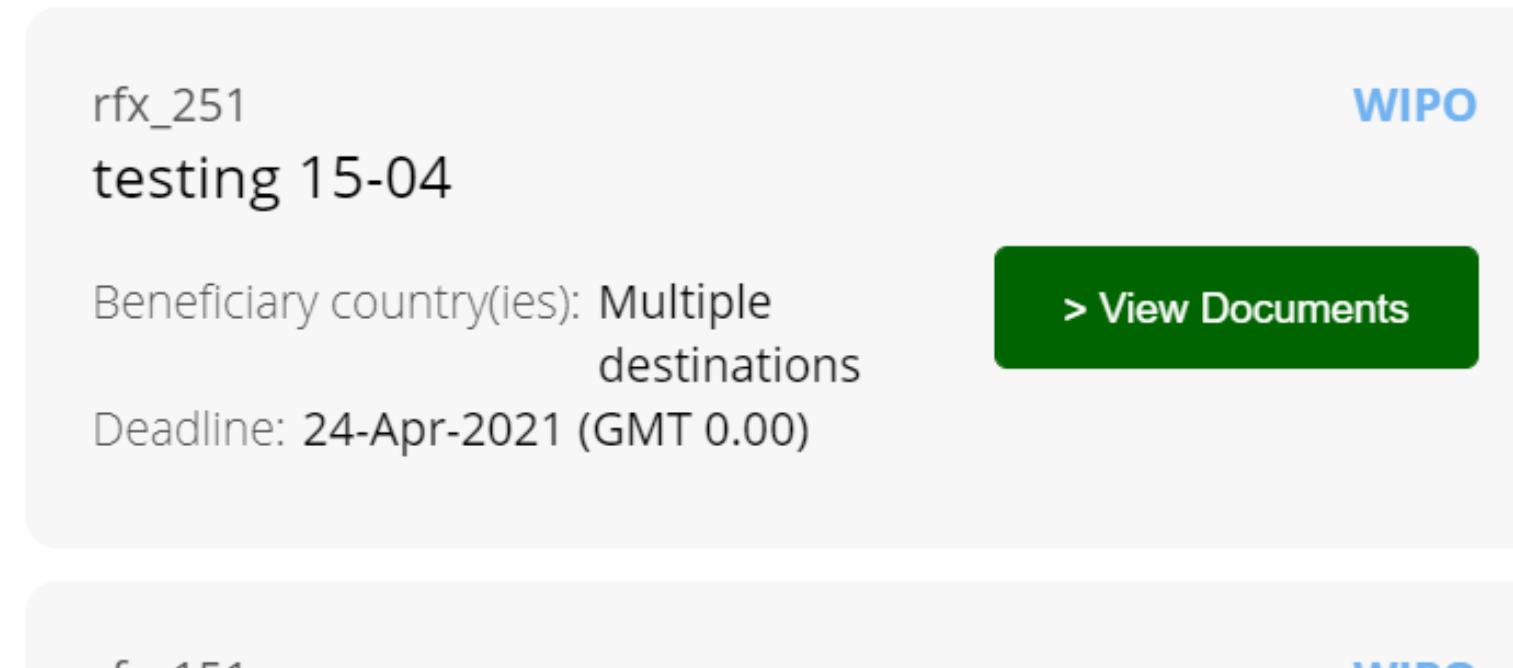If you have been invited to the event, you will see the event on your UNGM dashboard, in the section **MY EXPRESSION OF INTEREST** where you only have to ➡️click on **View Documents**.

MY **EXPRESSIONS OF INTEREST**

rfx_251

testing 15-04

WIPO

Beneficiary country(ies): Multiple destinations

Deadline: 24-Apr-2021 (GMT 0.00)

> View Documents

rfx_151

WIPO

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.

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.

TENDER MANAGEMENT

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.

▼ RFX: rfx_174 - ec2 test4   ▮▮▮ Running

    Project: project_56 - ec2 project
    Closing Date: 08/03/2022 09:00:00

🖨️   **Access Documents**   ✕ Decide Later   🖨️ Printable View

Response Status

Response Status
No Response Prepared

Overview

Code
rfx_174

Title
ec2 test4

Description

Event Currency

TENDER MANAGEMENT

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.

DOWLOAD TENDER DOCUMENTS

If there are more documents to be downloaded ➡️ click on the tab **Mass Download** to select and download all the documents.

Response Last Submitted On: Not Submitted Yet

RFX Details | Messages (Unread 0)

Settings | Buyer Attachments (1) | My Response | Associated Users

Path: root

Mass Download ...

Enter Filter (type to start search)

Folder/File Name	Description	Last Modification Date
1 doc 1.docx		09/04/2021 15:07:15

➡️ Click on the icon to download and read a single document

PREPARE RESPONSE

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.**

Edit Mode

✕ Cancel   **Decline To Respond**   ✕ Cancel

Decline To Respond

Enter Decline to Respond Reason Details

Characters available 512

PREPARE RESPONSE

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.**

Respond as a Single Organisation or Bidding Group: ☒

ⓘ Replying as a Bidding Group requires configuration in the Manage Bidding Group area

Select Response Type

- ⦿ My Organisation Only (No consortium)
- ○ Consortium (unspecified / other type)
- ○ Impresa Singola
- ○ RTI
- ○ Consorzio

Save   ✕ Cancel

PREPARE RESPONSE

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.

RFX Details	Messages (Unread 0)

Settings	Buyer Attachments (1)	My Response	Associated Users

⚠ **Your Response is not yet Submitted. To make it visible to the Buyer you must click 'Submit Response'**

Submit Response   **Online Questionnaire in Excel**

My Response Summary

1.	Qualification Response	Missing optional responses (1)		
2.	Technical Response	Missing optional responses (1)		
3.	Commercial Response	All quoted items completed	**Total Price (excluding optional sections)**	**0**

PREPARE RESPONSE

➡️ 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 a *.

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.

Response Last Submitted On: Not Submitted Yet

Edit Mode

⚠️ Your Response is not yet Submitted. To make it visible to the Buyer you must click 'Submit Response'

Save and Return   💾 Save and Continue   ✖ Cancel

✏️ Validate Response

PREPARE RESPONSE offline ⬆

➡ Click the **Online Questionnaire in Excel** button to respond to the RFX <u>offline</u>.

- 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, <u>save</u> 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.

| Settings | Buyer Attachments (1) | My Response | Associated Users |

⚠ **Your Response is not yet Submitted. To make it visible to the Buyer you must click 'Submit Response'**

Submit Response   **Online Questionnaire in Excel**

My Response Summary

COMMUNICATE WITH WIPO

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.
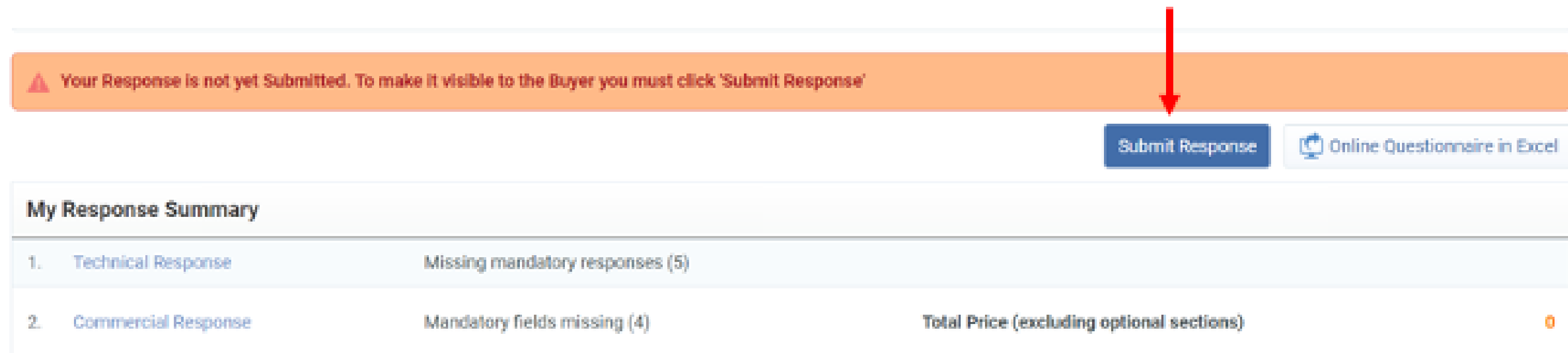
SUBMIT RESPONSE

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**.

⚠ Your Response is not yet Submitted. To make it visible to the Buyer you must click 'Submit Response'

Submit Response   🖵 Online Questionnaire in Excel

My Response Summary

1.	Technical Response	Missing mandatory responses (5)	
2.	Commercial Response	Mandatory fields missing (4)	Total Price (excluding optional sections)	0

MANAGE AN RFX: edit and delete responses

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.**

PRINT RESPONSE SUMMARY

To view and save your response, you can download a PDF and print the file by ➡ clicking on the ellipsis ("...") at the top right > **Printable view** and the following screen will appear:

CONTACT & ASSISTANCE:

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

JAGGAER Advantage

+33 146 09 56 72 (France)
+39 02 12 41 21 302 (Italy)
+34 917 870 226 (Spain)
+1 877 528 2947 (United States)
0800 069 8630 (United Kingdom)