



E-Bidding

Introduction to Training Manuals KPO b.v.

April 2016



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Logon

Access to the system by entering your User ID and password:

The login form is enclosed in a light blue border. On the left is the Karachaganak logo. To the right, the text 'E-Procurement (E-Bidding)' and 'Система электронных торгов' is displayed. Below this, there are two input fields: 'User *' and 'Password *'. A 'Log On' button is located at the bottom right of the form area.

 Karachaganak

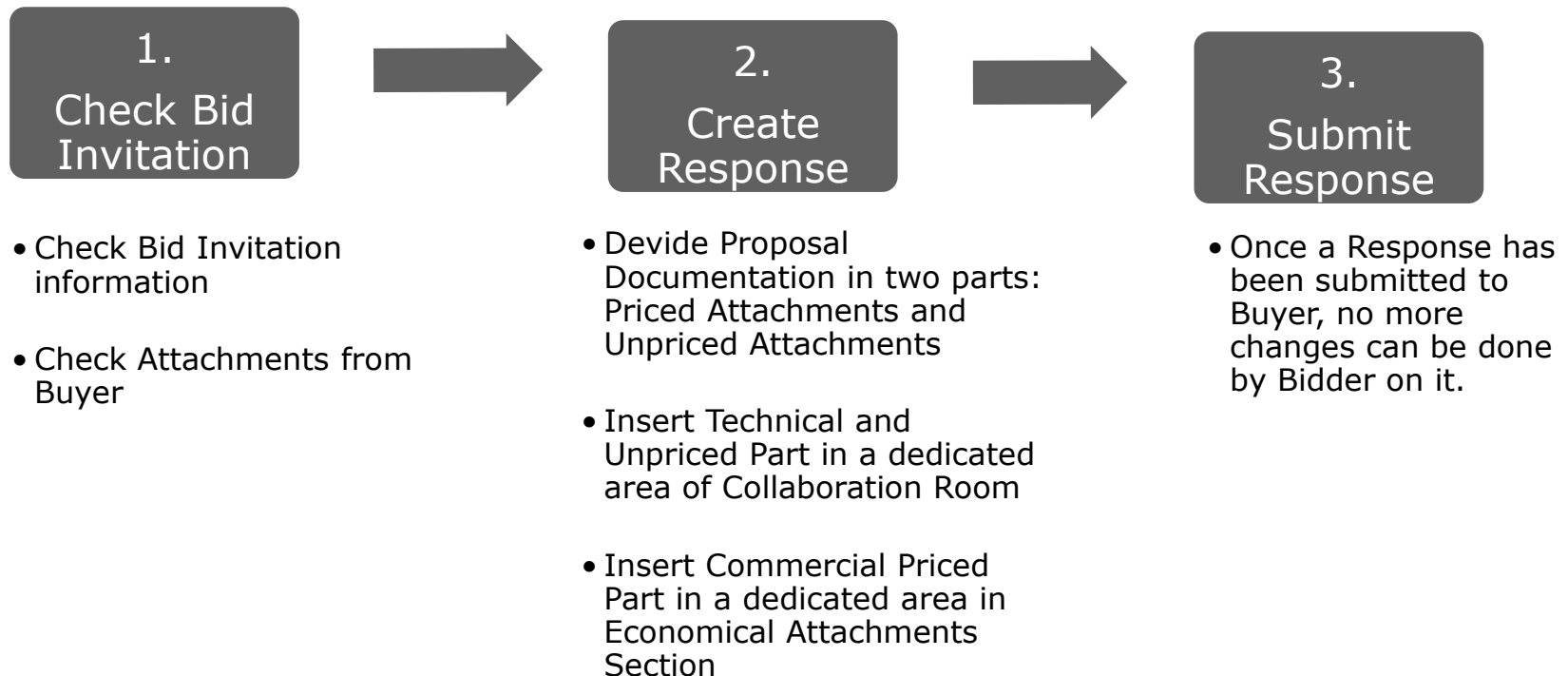
E-Procurement (E-Bidding)
Система электронных торгов

User * Password *

If you forget your password or to reset it, reference to Service Desk.

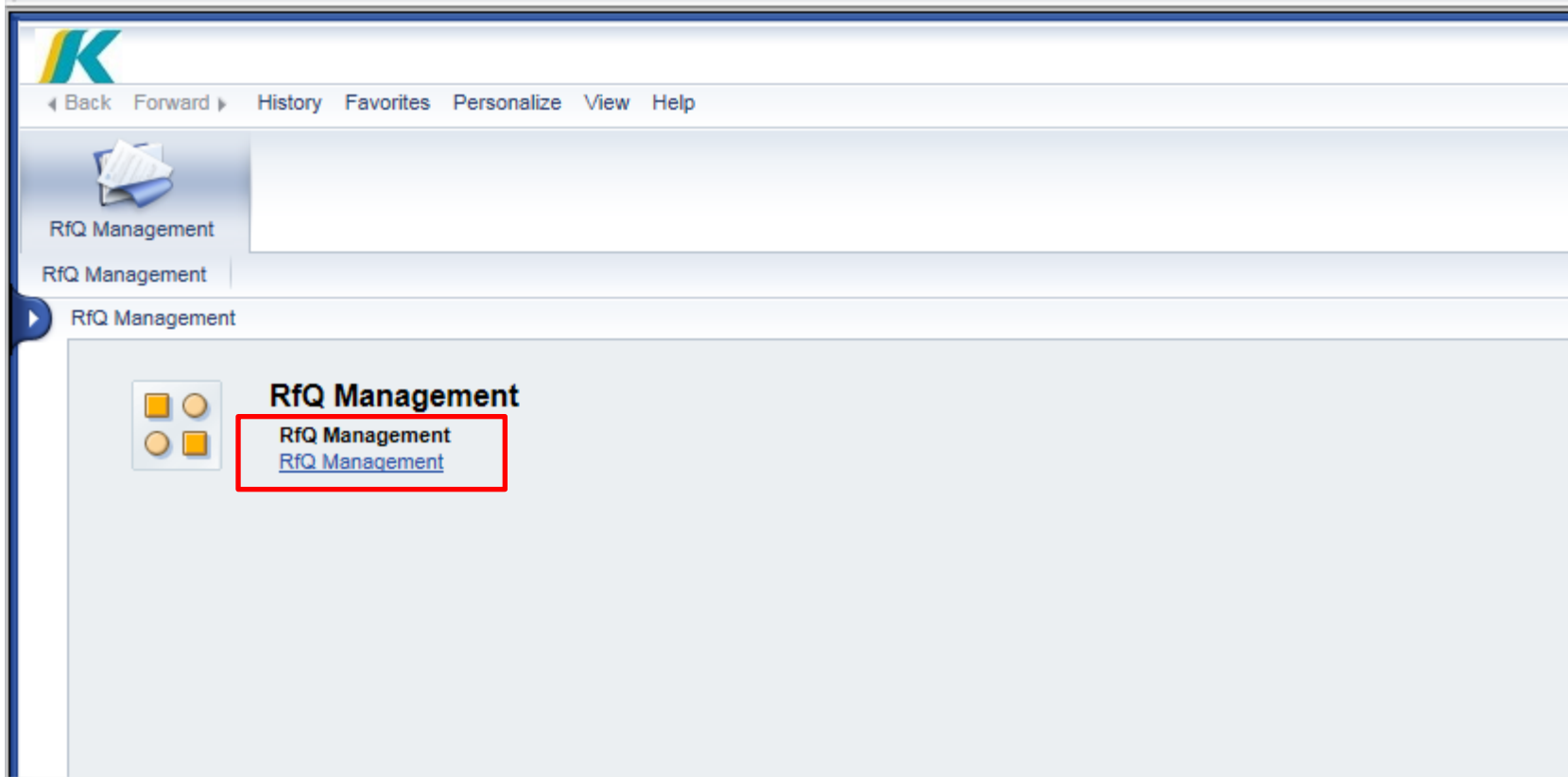
Main Bidder's Steps

Main Bidder's Steps



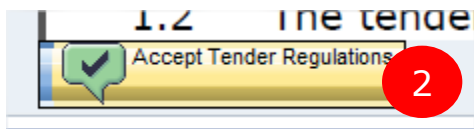
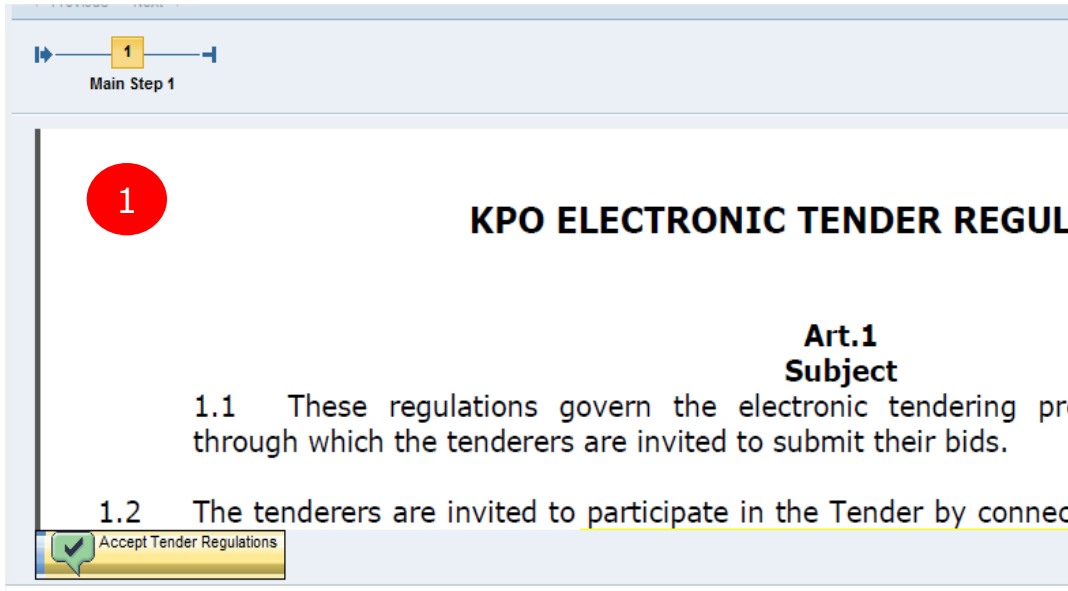
Logon

Home Page of the system will show menu for RfQ Management:



Click on RfQ Management Link and system will redirect you to Regulation acceptance view.

Regulation Acceptance



In order to participate to any Bid Invitation, you need to Accept "Tender Regulations".

In order to display the RfQ, scroll regulation document and Click on 'Agree' on bottom left of the screen.

System prompts confirmation pop-up.

If you click on "Cancel", RfQ won't be displayed.

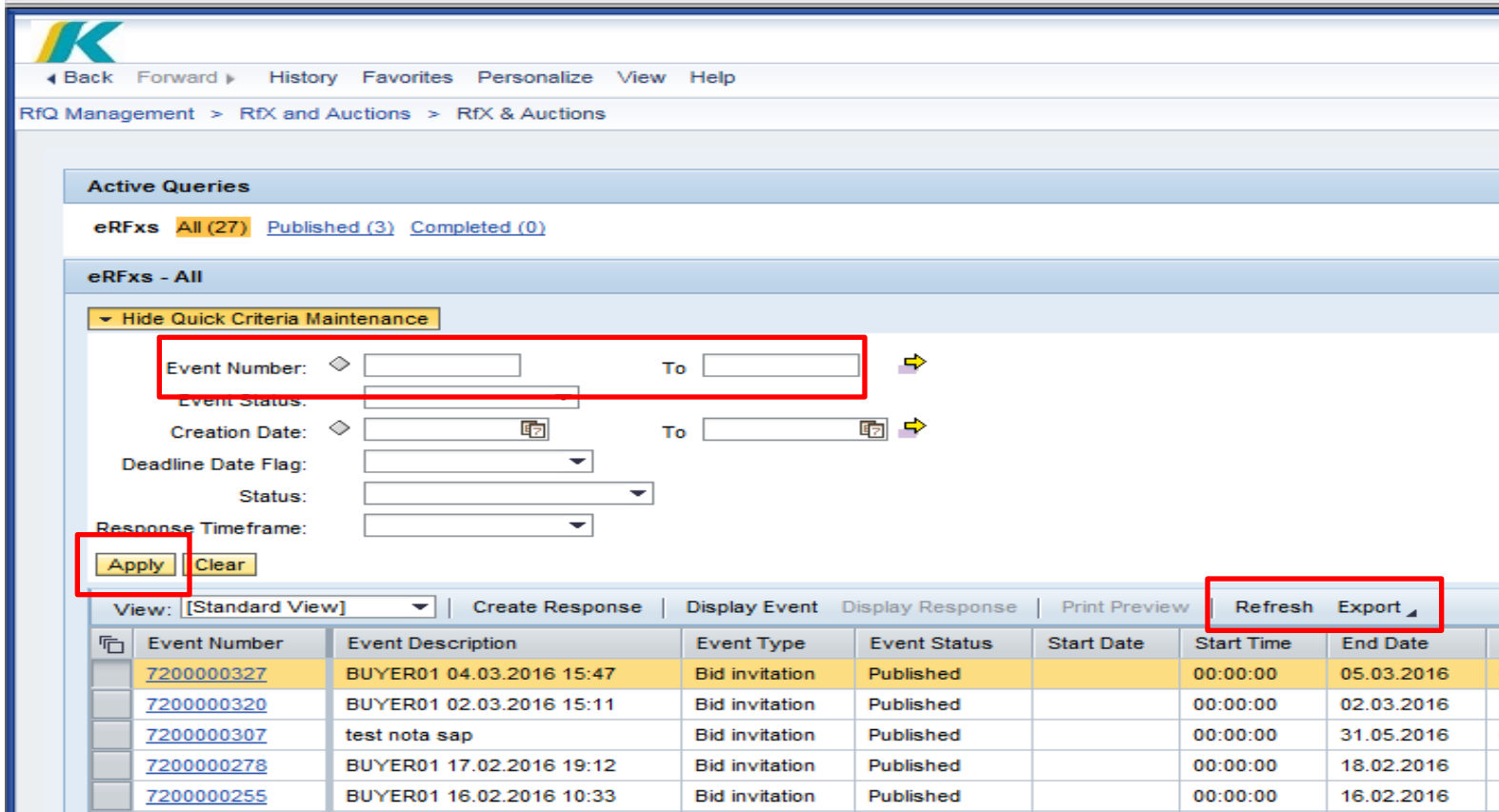
If you click "OK" system will open RfQ Panel.

Every time you want to open an RfQ, regulation must be accepted first.

First time you are going to create a quotation, regulation must be accepted.

Search RfQ

In order to open a Bid invitation you can search it directly by entering the Bid Invitation Number on appropriate field. Select 'Apply' Button.



The screenshot shows the 'RfQ Management' interface. At the top, there is a navigation bar with 'Back', 'Forward', 'History', 'Favorites', 'Personalize', 'View', and 'Help'. Below this is a breadcrumb trail: 'RfQ Management > RfX and Auctions > RfX & Auctions'. The main content area is titled 'Active Queries' and includes filters for 'eRFxs All (27)', 'Published (3)', and 'Completed (0)'. Under 'eRFxs - All', there is a section for 'Hide Quick Criteria Maintenance' with search filters for 'Event Number', 'Event Status', 'Creation Date', 'Deadline Date Flag', 'Status', and 'Response Timeframe'. The 'Event Number' and 'Creation Date' filters are highlighted with red boxes. Below the filters are 'Apply' and 'Clear' buttons, with 'Apply' also highlighted. At the bottom, there is a table with columns: 'Event Number', 'Event Description', 'Event Type', 'Event Status', 'Start Date', 'Start Time', 'End Date', and 'E'. The table contains five rows of data. The 'Refresh' and 'Export' buttons are highlighted with a red box.

Event Number	Event Description	Event Type	Event Status	Start Date	Start Time	End Date	E
7200000327	BUYER01 04.03.2016 15:47	Bid invitation	Published		00:00:00	05.03.2016	0
7200000320	BUYER01 02.03.2016 15:11	Bid invitation	Published		00:00:00	02.03.2016	1
7200000307	test nota sap	Bid invitation	Published		00:00:00	31.05.2016	0
7200000278	BUYER01 17.02.2016 19:12	Bid invitation	Published		00:00:00	18.02.2016	1
7200000255	BUYER01 16.02.2016 10:33	Bid invitation	Published		00:00:00	16.02.2016	1

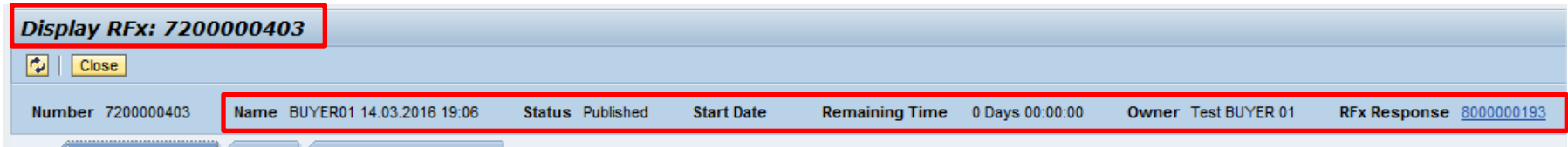
In order to **refresh** the list, select '**Refresh**' button. It's also available the 'Export' button to allows you save the list on .xls file.

Bid Invitation: Header information

Bid Invitation will be opened, clicking on RfQ number and after having accepted KPO tender regulation.

On the top of screen, Bid Invitation relevant information are displayed:

- ✓ RfQ Number: Bid Invitation number
- ✓ RfX Name: Name of the RfQ set by buyer
- ✓ RFX Status: Status of Bid Invitation (Published or Transaction Completed, once RfQ has been completed by the buyer)
- ✓ Submission Deadline: end date/time of Bid Invitation. After submission deadline, it will no longer possible to Submit a Response.
- ✓ Remaining Time: System displays how many days/hours/minutes/seconds remains to submit your Response



The screenshot shows a window titled "Display RFX: 720000403" with a "Close" button. Below the title bar is a table with the following data:

Number	720000403	Name	BUYER01 14.03.2016 19:06	Status	Published	Start Date	Remaining Time	0 Days 00:00:00	Owner	Test BUYER 01	RFX Response	800000193
--------	-----------	------	--------------------------	--------	-----------	------------	----------------	-----------------	-------	---------------	--------------	---------------------------

Bid Invitation: RfX Information

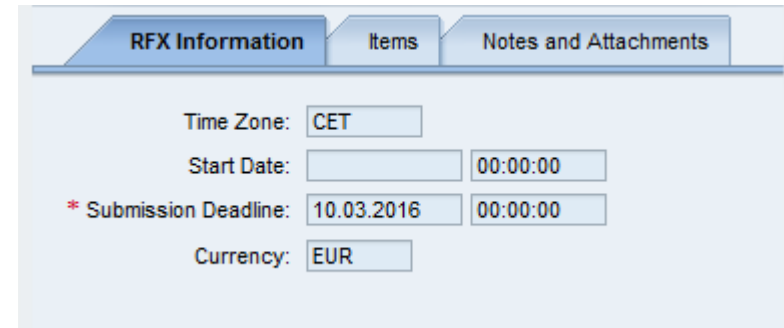
For each Bid they are available following tab:

- ✓ RFX Information
- ✓ Item
- ✓ Notes and Attachments

RFX Information

In this tab you can see information already displayed, on the top of the document.

In addition you can see document currency: you can submit your quotation in different currencies, not just in document currency, according to buyer choice.



The screenshot shows a web interface with three tabs: "RFX Information", "Items", and "Notes and Attachments". The "RFX Information" tab is active. Below the tabs, there are several input fields:

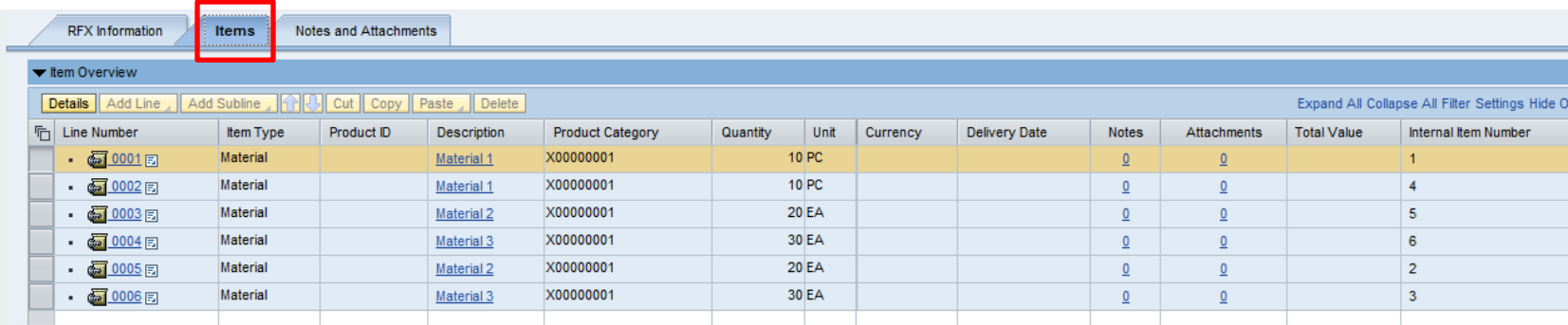
Time Zone:	<input type="text" value="CET"/>	
Start Date:	<input type="text"/>	<input type="text" value="00:00:00"/>
* Submission Deadline:	<input type="text" value="10.03.2016"/>	<input type="text" value="00:00:00"/>
Currency:	<input type="text" value="EUR"/>	

Bid Invitation: Items

On Item tab all items of RfQ are listed.


Description, quantity and delivery date are immediately available.

More details can be displayed for each item by selecting the line and click on 'Details' button:



Line Number	Item Type	Product ID	Description	Product Category	Quantity	Unit	Currency	Delivery Date	Notes	Attachments	Total Value	Internal Item Number
0001	Material		Material 1	X00000001	10	PC			0	0		1
0002	Material		Material 1	X00000001	10	PC			0	0		4
0003	Material		Material 2	X00000001	20	EA			0	0		5
0004	Material		Material 3	X00000001	30	EA			0	0		6
0005	Material		Material 2	X00000001	20	EA			0	0		2
0006	Material		Material 3	X00000001	30	EA			0	0		3

Details about product category, quantity and delivery date are available at "item data" level:



Item 0001 : Material 1

Item Data | Questions | Notes and Attachments

Identification

Product ID:

Description:

Product Category:

Further Properties

Currency, Values and Pricing

Required Quantity: Piece

Service and Delivery

Delivery Date / Time:

Bid Invitation: Notes and Attachments

In Notes and Attachments tab, you can find:

- Notes: i.e. Tender Text or Item Tender Text, if available
- Economical attachments: i.e. Commercial Attachment, if available
- Collaboration: under Collaboration, 'Collaboration Room', containing RfQ technical specification

Display RfX: 7200000494

Close Create Response

Number 7200000494 Name Manual 24.03.2016 16:26 Status Published Start Date End Date 24.03.2016 16:50:00 CET Remaining Time 0 Days 00:08:13
 Owner Test BUYER 01 RfX phase Technical Evaluation Tracking ID 7200000494 Flow type description Negotiation Stand-Alone

RFX Information Items **Notes and Attachments**

▼ Notes

Add Clear Filter Settings

Assigned To	Category	Text Preview
Document Header	External Tendering text	this is a text from buyer to bidders

▼ Economical Attachments

Add Attachment Edit Description Versioning Delete Create Qualification Profile Filter Settings

Assigned To	Category	Description	File Name	Version	Processor	Checked Out	Type	Size (KB)	Changed by	Changed on
Document Header	Standard Attachment	economical attachment from buyer	buyer_eco_attachment.txt	1		<input type="checkbox"/>	txt	1	BUYER01	24.03.2016

▼ Collaboration

Create

Collaboration	Created on
Collaboration RfX 7200000494	24.03.2016 16:38:44

Bid Invitation: Collaboration area rules overview (1/2)

Buyer inserts technical specification in clicking on the link available under collaborative area used to share information between buyers and bidder during RfQ phase.

Collaborative area is mandatorily created by buyer during RfQ creation and is made up of the following areas:

- Public Area: Technical Section xxxxxx (directly accessed from RfQ)
 - 1. Technical Request for Quotation: this folder is used by buyer to insert initial Technical specifications
 - 2. Technical Public Updates: this folder is used by buyer to insert follow-on information related to Technical specification. Once an RfQ has been published, all updates are inserted in this folder. Nothing can be inserted in the previous one.
- Private Area: Offer xxxxxx Vendor Name (directly accessed from Quotation)
 - 3. Technical Bid: this folder is used by bidder to insert Technical Bid
 - 4. Request for Clarification\4.1 Bidder: this folder is used by bidder to require\send private clarification to buyer
 - 4. Private Clarification\4.2 Buyer: this folder is used by buyer to require\send private clarification to bidder

Buyer and bidders can access to collaboration area from both RfQ and Quotation and then can switch from Private to Public Area and viceversa.

Bid Invitation: Collaboration area rules overview (2/2)

		Buyer	Bidder 1	Bidder 2
Public Area	1. Technical Request for Quotation	Create\Delete	Read	Read
	2. Technical Public updates	Create	Read	Read
Private Area Bidder 1	3. Technical Bid	Read	Create\Delete	[Greyed out]
	4.1 Technical Private clarification\Buyer	Create	Read	
	4.2 Technical Private clarification\Bidder	Read	Create	
Private Area Bidder 2	3. Technical Bid	Read	[Greyed out]	Create\Delete
	4.1 Technical Private clarification\Buyer	Create		Read
	4.2 Technical Private clarification\Bidder	Read		Create

This table describes the maximum level of rights assigned to each role. At any time, according to the tender phase:

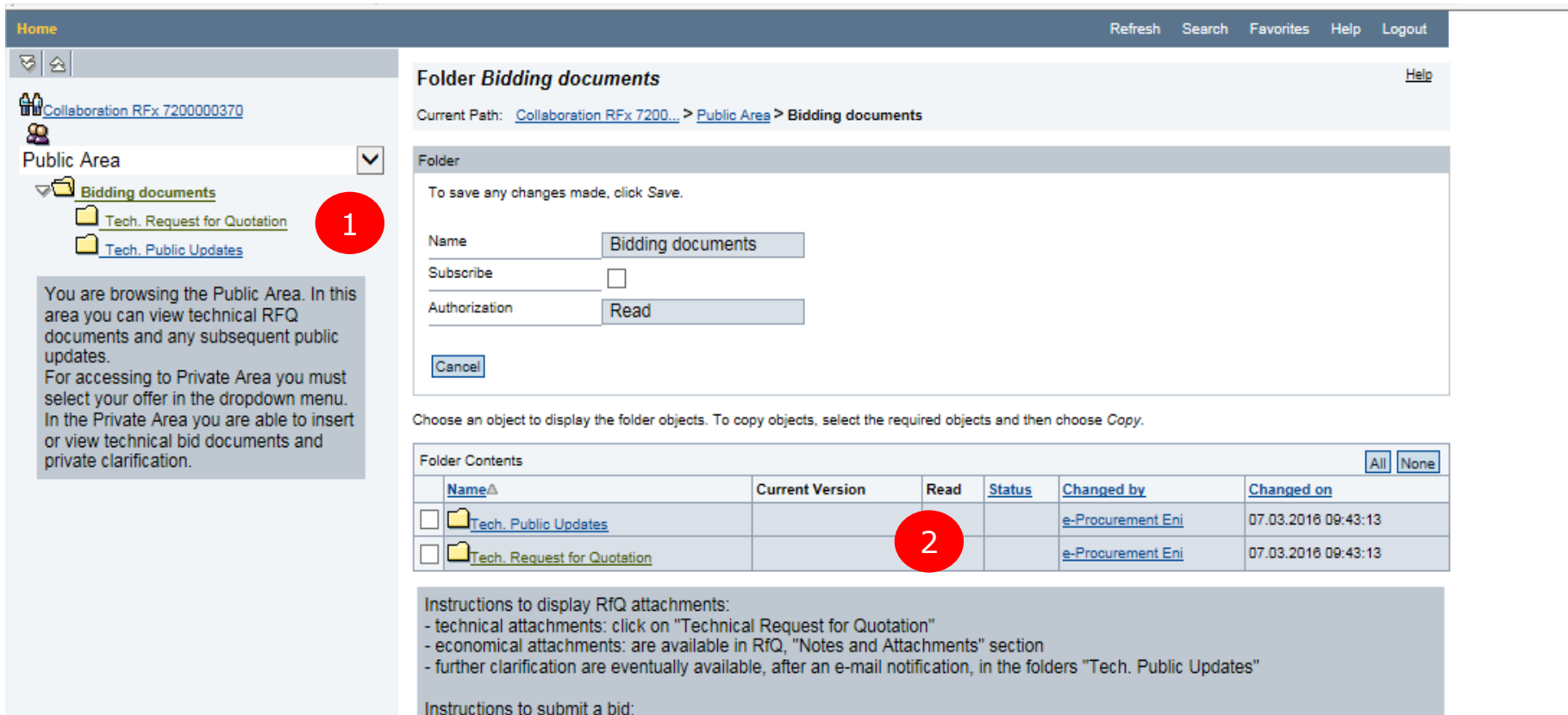
- Users will view only a subset of these folders
- Authorizations 'Create' and 'Delete' may be downgraded to 'Read'

When a new file is uploaded in folders highlighted in red an email notification will be sent to buyer/bidders interested in that folder.

Bid Invitation: Collaboration – View documents in cFolders

To open an attachment uploaded in cFolders:

1. On the left, select public/private area in the drop-down menu and open the folder you are interested in **(1)**.
2. On the right, click the link under 'Current Version' to open/download the file **(2)**.



The screenshot shows the cFolders interface. On the left, the 'Public Area' is selected in the drop-down menu, and the 'Bidding documents' folder is expanded. A red circle with the number '1' highlights the 'Bidding documents' folder. Below the folder list, a text box provides instructions: 'You are browsing the Public Area. In this area you can view technical RFQ documents and any subsequent public updates. For accessing to Private Area you must select your offer in the dropdown menu. In the Private Area you are able to insert or view technical bid documents and private clarification.'

The main content area shows the 'Folder Bidding documents' with the current path: 'Collaboration RFx 7200... > Public Area > Bidding documents'. Below this, there is a form for folder settings: Name (Bidding documents), Subscribe (checkbox), Authorization (Read), and a Cancel button.

Below the form, there is a table titled 'Folder Contents' with columns: Name, Current Version, Read, Status, Changed by, and Changed on. A red circle with the number '2' highlights the 'Read' column. The table contains two rows:

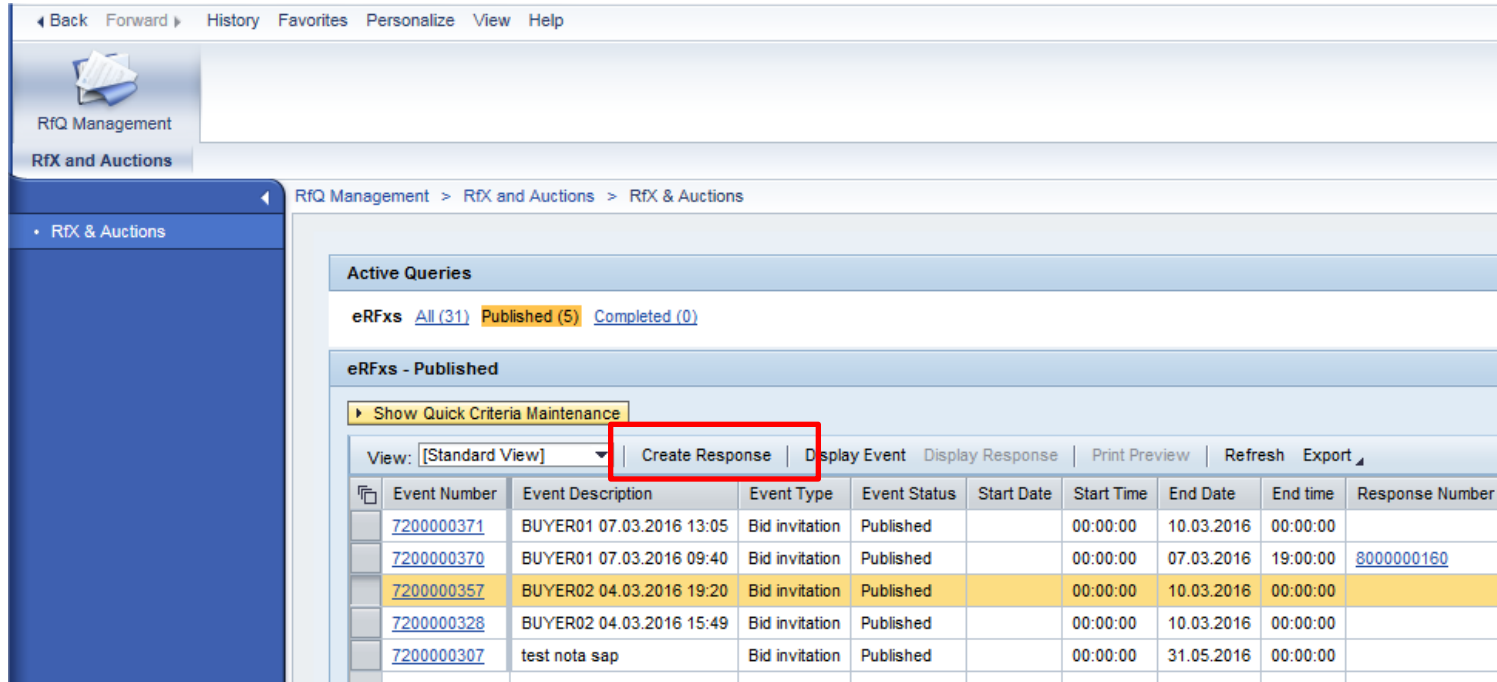
	Name	Current Version	Read	Status	Changed by	Changed on
<input type="checkbox"/>	Tech. Public Updates				e-Procurement Eni	07.03.2016 09:43:13
<input type="checkbox"/>	Tech. Request for Quotation				e-Procurement Eni	07.03.2016 09:43:13

Below the table, there are instructions to display RfQ attachments and instructions to submit a bid.

Create a Response (1/2)

You can create a Response directly from the List (1) or opening the Bid invitation (2).

1. Select the Bid Invitation line and click on 'Create Response' button.

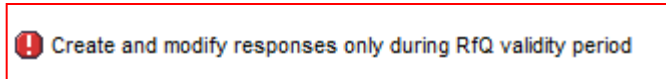


The screenshot shows the 'RfQ Management' interface. The breadcrumb trail is 'RfQ Management > RfX and Auctions > RfX & Auctions'. Under 'Active Queries', there are links for 'eRFxs All (31)', 'Published (5)', and 'Completed (0)'. The 'eRFxs - Published' section has a 'Show Quick Criteria Maintenance' button. Below this is a table with columns: Event Number, Event Description, Event Type, Event Status, Start Date, Start Time, End Date, End time, and Response Number. The table contains several rows, with the row for 'BUYER02 04.03.2016 19:20 Bid invitation Published' highlighted in yellow. Above the table, there are buttons for 'View: [Standard View]', 'Create Response', 'Display Event', 'Display Response', 'Print Preview', 'Refresh', and 'Export'. The 'Create Response' button is highlighted with a red box.

Event Number	Event Description	Event Type	Event Status	Start Date	Start Time	End Date	End time	Response Number
7200000371	BUYER01 07.03.2016 13:05	Bid invitation	Published		00:00:00	10.03.2016	00:00:00	
7200000370	BUYER01 07.03.2016 09:40	Bid invitation	Published		00:00:00	07.03.2016	19:00:00	8000000160
7200000357	BUYER02 04.03.2016 19:20	Bid invitation	Published		00:00:00	10.03.2016	00:00:00	
7200000328	BUYER02 04.03.2016 15:49	Bid invitation	Published		00:00:00	10.03.2016	00:00:00	
7200000307	test nota sap	Bid invitation	Published		00:00:00	31.05.2016	00:00:00	

Pay attention to the validity date. If the submission deadline is not reached or is in the past:

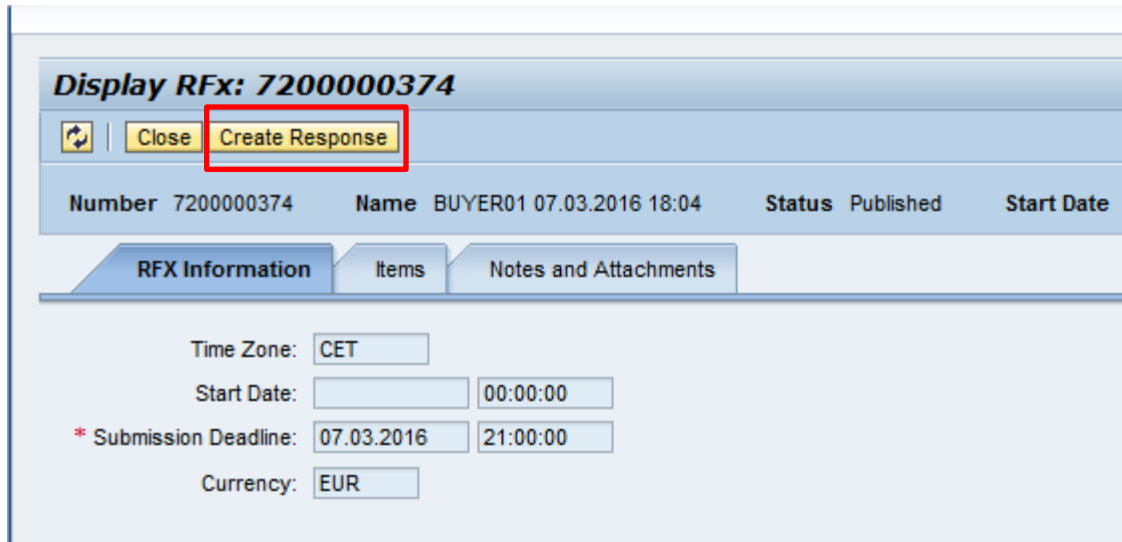
- 'create response' button is not available or
- an error message is displayed:



Create a Response (2/2)

2. Select Bid invitation Number from list and open the document, clicking on RfQ number.

On RfQ, you can create your response by the button shown below:

A screenshot of a web application interface for displaying an RfQ. The title is 'Display RfQ: 7200000374'. Below the title, there are three buttons: a refresh button, a 'Close' button, and a 'Create Response' button which is highlighted with a red rectangle. Below the buttons, there is a table with the following data: Number: 7200000374, Name: BUYER01 07.03.2016 18:04, Status: Published, Start Date: (empty). Below the table, there are three tabs: 'RFX Information', 'Items', and 'Notes and Attachments'. The 'RFX Information' tab is selected. Below the tabs, there are several input fields: 'Time Zone: CET', 'Start Date: [] [] 00:00:00', '* Submission Deadline: 07.03.2016 [] 21:00:00', and 'Currency: EUR'.

In both cases, system will open a new windows 'Create RfQ response'.

Other available buttons on RfQ are :

- ✓ Close: close the RfQ windows and moves back to Bid Invitation list
- ✓ Refresh: refresh document with new data (if available)

Response: RfX Information

Currency

You can choose a currency among those allowed, according to buyer selection on the RfQ. Use match code, as shown below, to select the appropriate currency:

Create RfX Response: 8000000163

Submit | Read Only | Check Close Save

Response 8000000163 created

Number 8000000163	RfX Number 7200000374	Status Saved	Submission Deadline 07.03.2016 21:00:00 CET	Remaining Time 0 Days 02:47:
RfX Version Number 2				

[RfX Information](#) | [Items](#) | [Notes and Attachments](#) | [Summary](#) | [Tracking](#)

Event Parameters

Currency:
 European Euro
 United States Dollar
 European Euro

Status and Statistics

Created On: 07.03.2016 18:12:05 CET

Created By: Mr. Giulio Rossi

Last Processed On: 07.03.2016 18:12:05 CET

Last Processed By: Mr. Giulio Rossi

Status and Statistics

On your right you can see Statistical Information.

Status and Statistics

Created On: 07.03.2016 18:12:05 CET

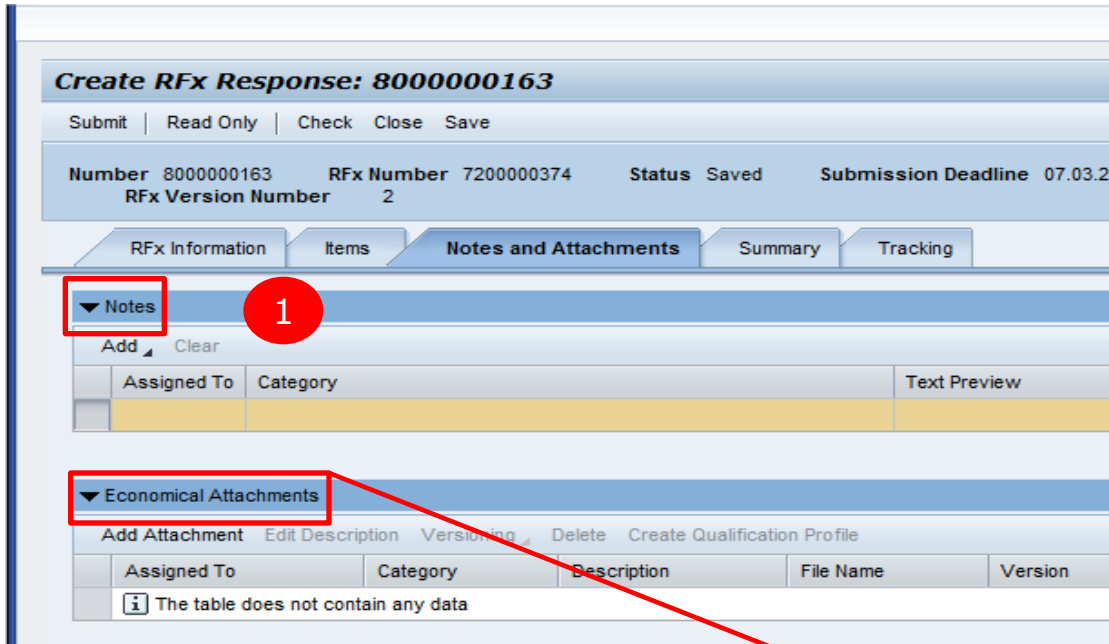
Created By: Mr. Giulio Rossi

Last Processed On: 07.03.2016 18:12:05 CET

Last Processed By: Mr. Giulio Rossi

Response: Notes and Attachments

In the 'Notes and Attachments' tab it's possible to add Notes and Commercial Attachment.



Create RFX Response: 8000000163

Submit | Read Only | Check Close Save

Number 8000000163 RFX Number 7200000374 Status Saved Submission Deadline 07.03.20
RFX Version Number 2

RFX Information Items **Notes and Attachments** Summary Tracking

▼ Notes **1**
Add Clear

Assigned To	Category	Text Preview

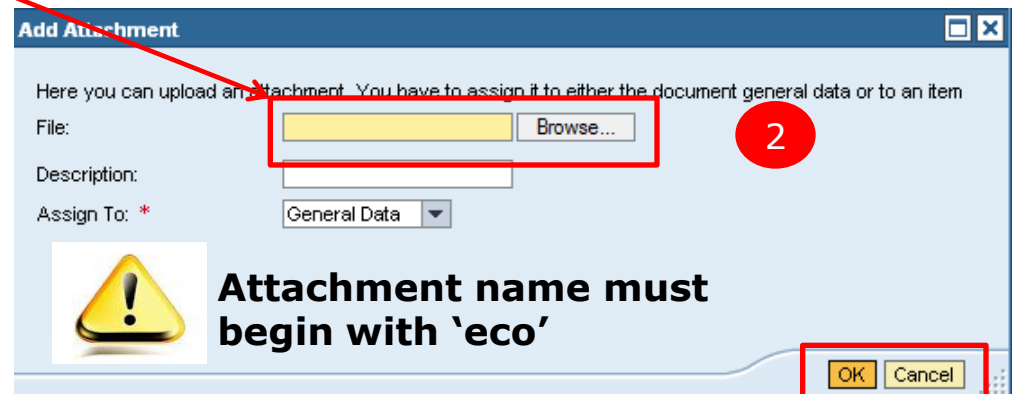
▼ Economic Attachments
Add Attachment Edit Description Versioning Delete Create Qualification Profile

Assigned To	Category	Description	File Name	Version
The table does not contain any data				

1. 'Add' button allows you to enter a text, in a note. Insert the text then click 'OK' button.
2. 'Economic Attachments' button allows you to upload a local file, in any format. Please pay attention to have the file on you desktop before uploading it, to avoid any problem of too long path. Choose file, using "Browse" button, then click 'OK' button to upload it.

Very important recommendation

Do not insert Technical Bid here: for technical and unpriced attachments please see next pages




Add Attachment

Here you can upload an attachment. You have to assign it to either the document general data or to an item

File: Browse... **2**

Description:

Assign To: *

 **Attachment name must begin with 'eco'**

OK Cancel

Response: Upload documents in cFolders

In the tab Notes and Attachments it is possible to access 'Collaboration Room' where will be possible add Technical and Unpriced Attachments.

To access 'Collaboration Room' click on the link and a new browser window will open:

Display RFX Response: 800000228

Check Close

Number 800000228 RFX Number 7200000494 Status Saved Submission Deadline 24.03.2016 16:50:00 CET
 Opening Date 24.03.2016 16:50:00 CET Remaining Time 0 Days 00:00:00 RFX Owner Test BUYER 01 Total Value 0,00 EUR
 Tracking ID 7200000494 Flow type description Negotiation Stand-Alone

RFx Information Items **Notes and Attachments** Summary Tracking

Notes

Add Clear Filter Settings

Assigned To	Category	Text Preview
Document Header	RFx/Auction Text	this is a text from buyer to bidders

Economical Attachments

Add Attachment Edit Description Versioning Delete Create Qualification Profile Filter Settings

Assigned To	Category	Description	File Name	Version	Processor	Checked Out	Type	Size (KB)	Changed by	Changed on
The table does not contain any data										

Collaboration

Create

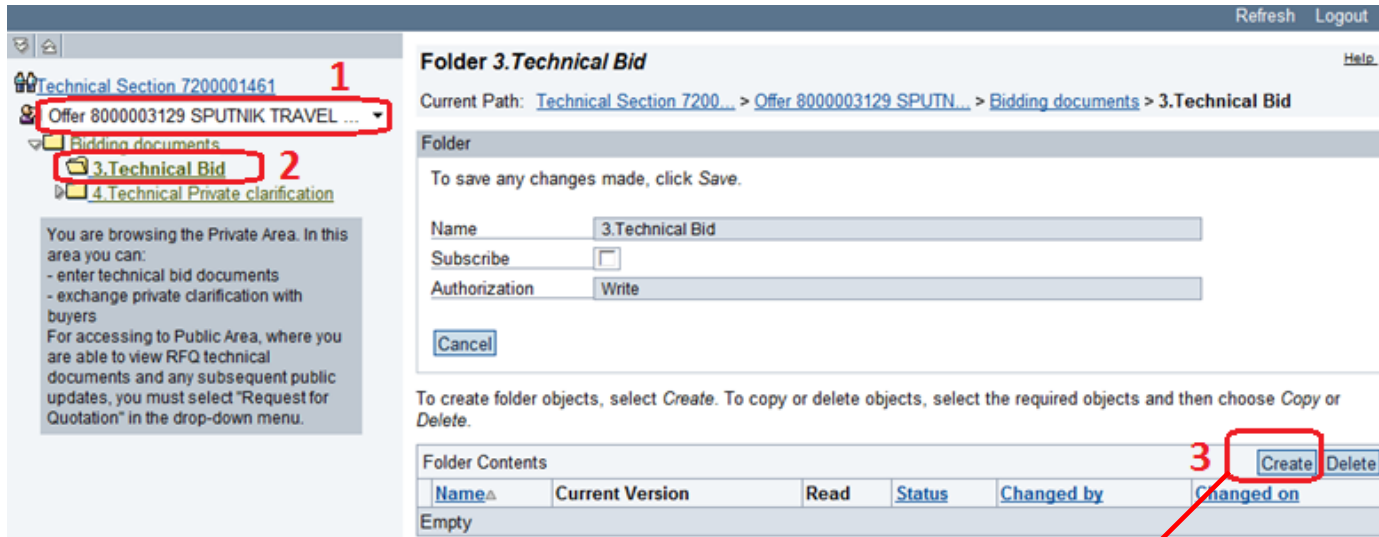
Created on	Collaboration Room
24.03.2016 16:44:10	RFxResp 8000000228 Ditta Verdi SPA

Response: Upload documents in cFolders

In the 'Collaboration Room' in the Notes and Attachments tab it's possible to add Technical and Unpriced Attachments.

To upload a new attachment:

1. Open your Private Area – Offer xxxxx
2. Click on folder **Technical Bid**
3. Click the button 'Create'



Refresh Logout

Technical Section 7200001461

Offer 8000003129 SPUTNIK TRAVEL ...

Bidding documents

3.Technical Bid

4.Technical Private clarification

You are browsing the Private Area. In this area you can:
- enter technical bid documents
- exchange private clarification with buyers
For accessing to Public Area, where you are able to view RFQ technical documents and any subsequent public updates, you must select "Request for Quotation" in the drop-down menu.

Folder 3.Technical Bid

Current Path: Technical Section 7200... > Offer 8000003129 SPUTN... > Bidding documents > 3.Technical Bid

Folder

To save any changes made, click Save.

Name 3.Technical Bid

Subscribe

Authorization Write

Cancel

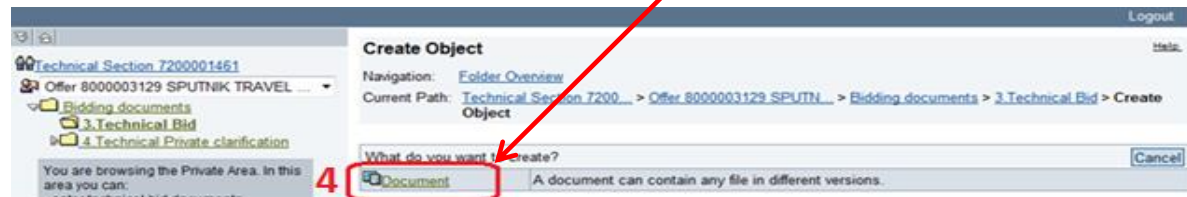
To create folder objects, select Create. To copy or delete objects, select the required objects and then choose Copy or Delete.

Folder Contents

Name	Current Version	Read	Status	Changed by	Changed on
Empty					

Create Delete

4. Click the link 'Document'



Logout

Technical Section 7200001461

Offer 8000003129 SPUTNIK TRAVEL ...

Bidding documents

3.Technical Bid

4.Technical Private clarification

You are browsing the Private Area. In this area you can:
- enter technical bid documents

Create Object

Navigation: Folder Overview

Current Path: Technical Section 7200... > Offer 8000003129 SPUTN... > Bidding documents > 3.Technical Bid > Create Object

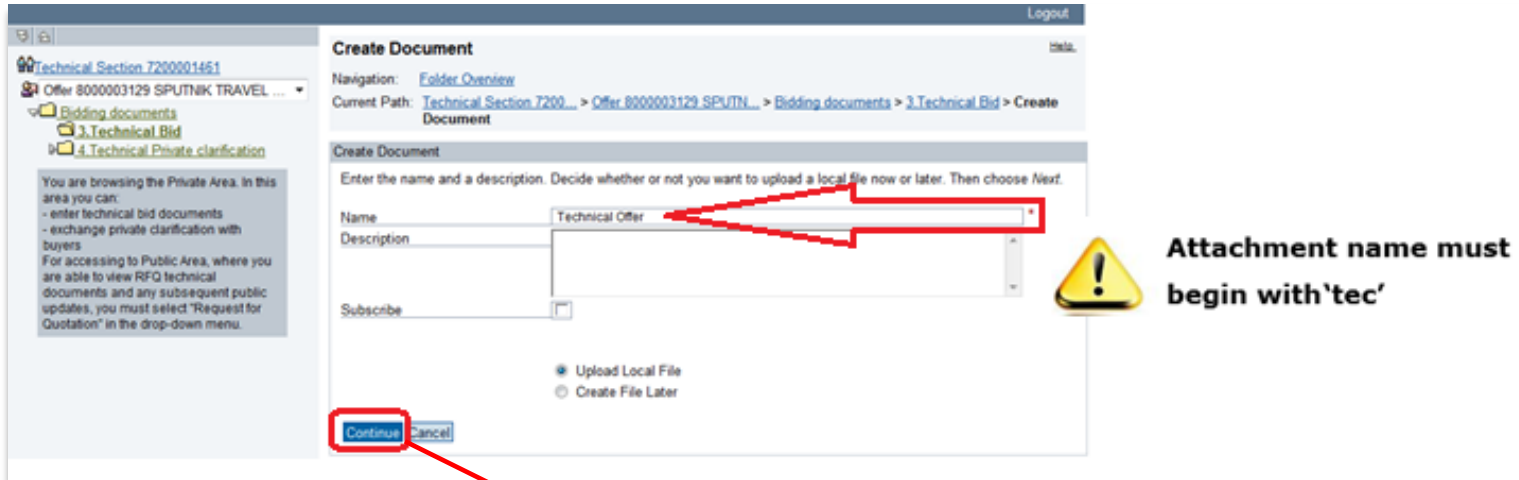
What do you want to create?

Document A document can contain any file in different versions.

Cancel

Response: Upload documents in cFolders

5. Specify a 'Name' and click 'Continue'



Attachment name must begin with 'tec'

6. Select the file using the 'Browse' function then click 'Save'.



7. Document list will be shown in the table: click the link under 'Current Version' to open/download the file.



Name	Current Version	Read	Status	Changed by	Changed on
 Technical Offer	technical.docx (11KB)			CTS101112001_techedge1	28.11.2013 14:07:38

Edit a Response

1. A Response can be modified during RfQ validity period or till Response hasn't been submitted. From e-RFXs query, Response number, created for each Bid invitation, is shown.

Click on Response number to open the document.

Bid Invitation Number	Bid Invitation Description	Bid Invitation Type	Bid Invitation Status	Start Date	End Date	Response Number	Response Status
7200001031	IRQ_BUYER_01 23.10.2012 17:30:40	e-RFQ for Tender	Published	23.10.2012	23.10.2012	8000002109	Submitted
7200001027	gare electronique last.	e-RFQ for Tender	Published	22.10.2012	22.10.2012	8000002101	Submitted
7200001024	IRQ_BUYER_01 18.10.2012 12:28:16	e-RFQ for Tender	Published	18.10.2012	02.11.2012	8000002088	Saved

2. Response can be modified clicking on 'Edit' button.

Display Response : 8000002088

Quotation Number 8000002088 RFQ Number 7200001024 Status Saved

Tracking ID 7000001539

Edit Close Refresh Check Export

RFX Information Items Notes and Attachments

Event Parameters

Currency: United States Dollar for Iraq.

Rebid: 01

Scenario: Technical Rebid

3. Response is available in Edit mode and both 'Save' and 'Submit' button are available to hold quotation or resend it to buyer.

Edit Response : 8000002088

Quotation Number 8000002088 RFQ Number 7200001024 Status Saved

Tracking ID 7000001539

Submit Close Read Only Check **Save** Delete Export

RFX Information Items Notes and Attachments

Event Parameters

Currency: United States Dollar for Iraq.

Rebid: 01

Scenario: Technical Rebid

Save a Response

Enter your data and select 'Save' button.

Response will be created in Saved status:
response is not available to buyer to be
displayed.

Display Response : 8000002106

Quotation Number	8000002106	RFQ Number	7200001030	Status	Saved
Tracking ID	7000001542				

Response 8000002106 saved

Submit a Response

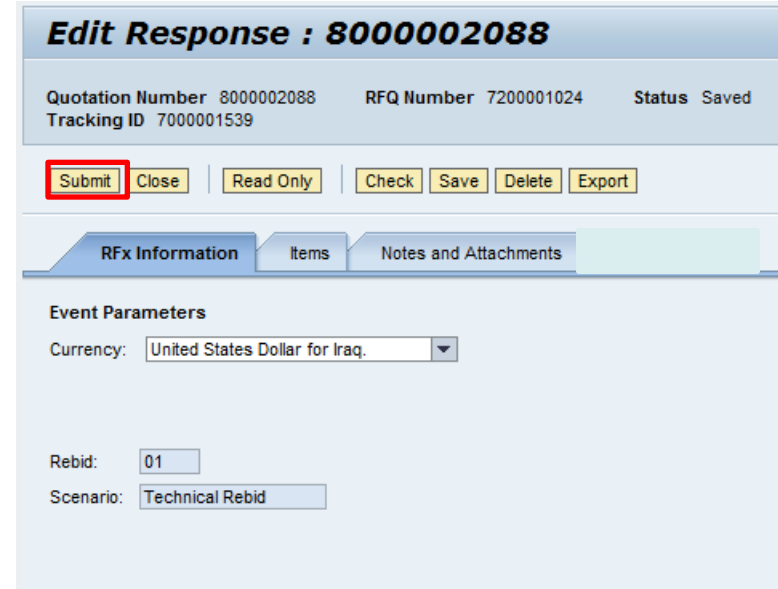
Before submitting a Response, verify that following information has been entered:

- ✓ Prices
- ✓ Technical attachment, if required
- ✓ Commercial Attachment, if needed

In order to submit your Response, click on 'Submit' button

When a Response is 'submitted', buyer can open it.

Once a Response has been submitted, no more changes can be done on it. You can just require/give clarification via cFolders (folders under '4. Technical Private clarification') but you can not add new attachments in folder '3. Technical bid'.



Edit Response : 8000002088

Quotation Number 8000002088 RFQ Number 7200001024 Status Saved
Tracking ID 7000001539

RFX Information Items Notes and Attachments

Event Parameters

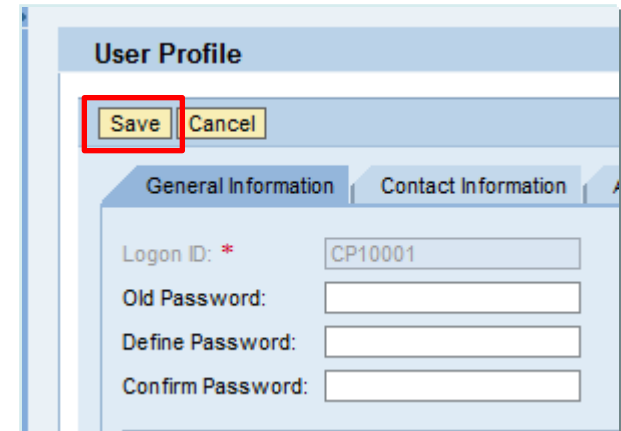
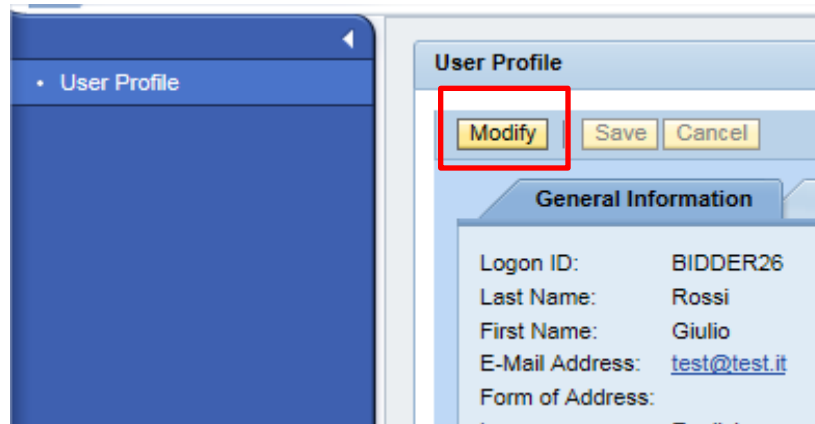
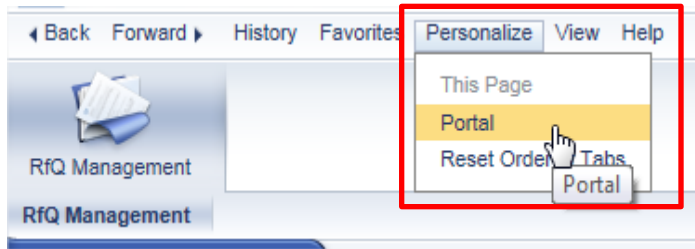
Currency: United States Dollar for Iraq.

Rebid: 01

Scenario: Technical Rebid

Change Password

If you want to change password, click on "Personalize" and then "Portal" menu



Insert old password and new password, then Save.
Password is updated successfully.