Quantum procurement user guide for UNDP users

May 2022

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How to use this Guide

This guide is organized in several sections that correspond to different functions of the Quantum system. Each section beginning is marked with a green slide.

The Table of Contents (TOC) provides an overview of the document content. It contains hyperlinks to the exact page of the content in the document so the reader can navigate directly to the relevant section. Each section starts with a brief overview of the content of that section with hyperlinks.

Throughout the document, there are three types of hyperlinks:

- Hyperlink buttons that will take reader to the main TOC, found at the bottom right corner of each main chapter page, such as the one on this page.
- Hyperlinks that take readers to the beginning of the current section, usually found at the top right corner like in this page.
- Hyperlinked words that take reader directly to a location of the document related to the text. For example, by clicking on the hyperlinked **TOC** here, the reader can go directly to the TOC page of this document.
- Throughout the document, you may see the sign. This means that there is a further explication of a content which is explained in the current slide.

INTRODUCTION

Who should use this guide

This guide describes all the procurement steps and how they are managed in the new Procurement system. The primary audience of this guide are procurement practitioners managing procurement processes but other users who are involved in the process also need to consult this guide as it covers actions fulfilled by other roles such as requestor, project manager, evaluation team member, etc.

What is Quantum Procurement System

Quantum procurement refers to the online system used by UNDP to manage the procurement process digitally. Quantum is designed based on two main platforms:

- Oracle Cloud which handles most of the procurement processes, e.g. Solicitation, Contracts, Suppliers, etc.
- ServiceNow (UNall) which handles other parts of the process such as: Procurement strategy, Case management, Oversight review, etc.

Logging it to both system is enabled through UNDP MFA login system.

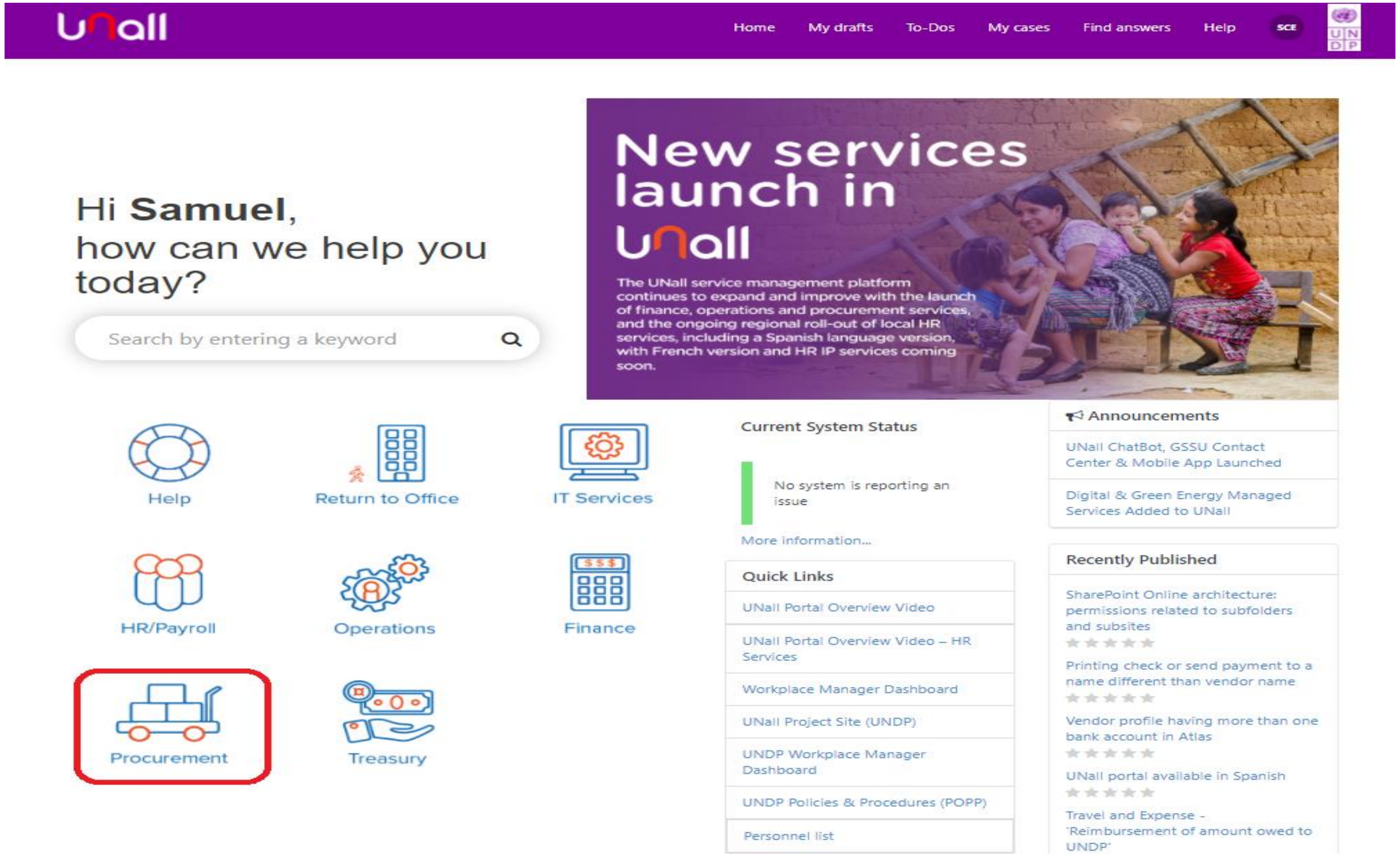
GET READY TO USE THE SYSTEM

Step	Objective	Actions needed	Who takes the action
1	Establish contact between procurement focal points of your office and Quantum support team.	Contact the Quantum support team and provide the names and email addresses for the CAP Secretary, Head of Procurement, Operations Manager and/or DRR operations in your CO.	Country Office
2	Establish a rollout plan for the office.	Review procurement plan to identify pilot cases. Communicate internally within the office. Prepare rollout and training plans	Country Office
3	Collect user information.	Identify users who need to have access to Quantum and complete the User Account Request form. Have it approved (DocuSign) by ARGUS manager/approver and submit it (both the signed pdf and the excel file) via UNall. See detailed instructions in this **Annex.**	Country Office
4	Setup BU and users.	Setup BU and users access in the new system.	ITM and Quantum Support team
5	Train users and launch system.	Review training materials and other resources: Quantum Procurement Rollout support webpage. Create the draft case both un UNAll and in Quantum and create an incident on UNall. Review the draft case, insert the necessary changes and launch the case.	Country Office with support from Quantum support team

1. Procurement request, Procurement Strategy & CMS (UNall)

Return to TOC

1.1 Create a Procurement Request in UNall

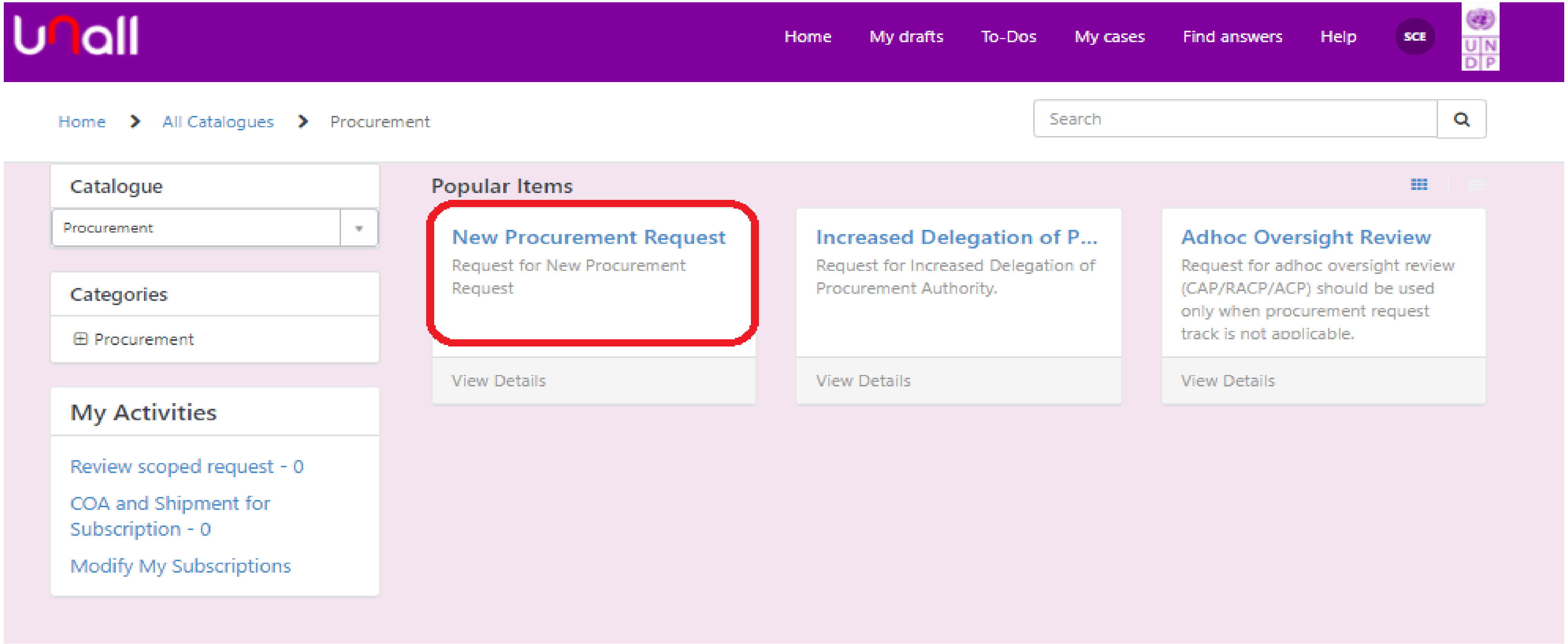


Log in to UNall and Select "***Procurement***" from the available services.
A procurement request must be created in Unall as well in order to create a case in Unall system needed for later steps such as Case Management, Oversight, etc.

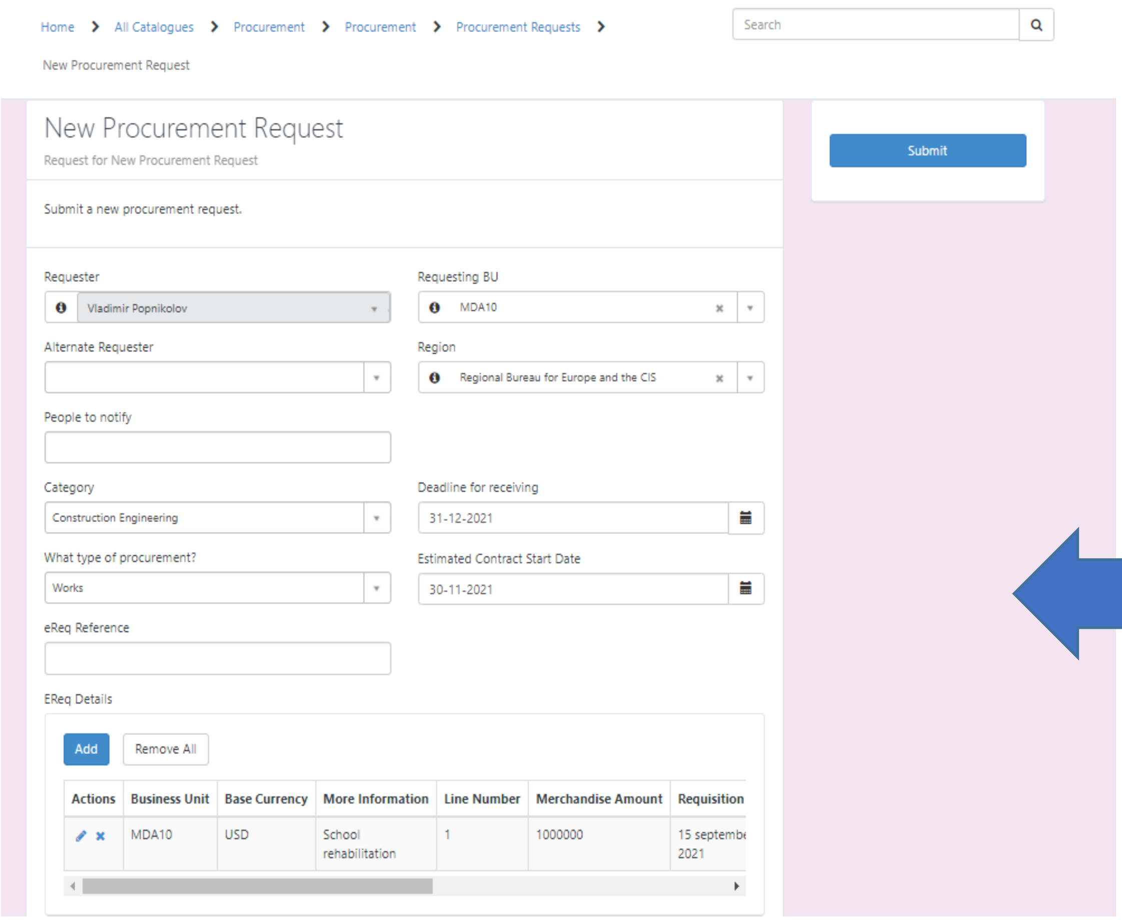
All procurement related systems will be grouped in this section.

1.1 Create a Procurement Request in UNall

To initiate a procurement request, click on "***New Procurement Request***"



1.1 Create a Procurement Request in UNall



Complete the fields in the form. Some are mandatory and some are optional:

- Insert ATLAS requisition ID.
- Then, update lines by either deleting some or adding new lines.

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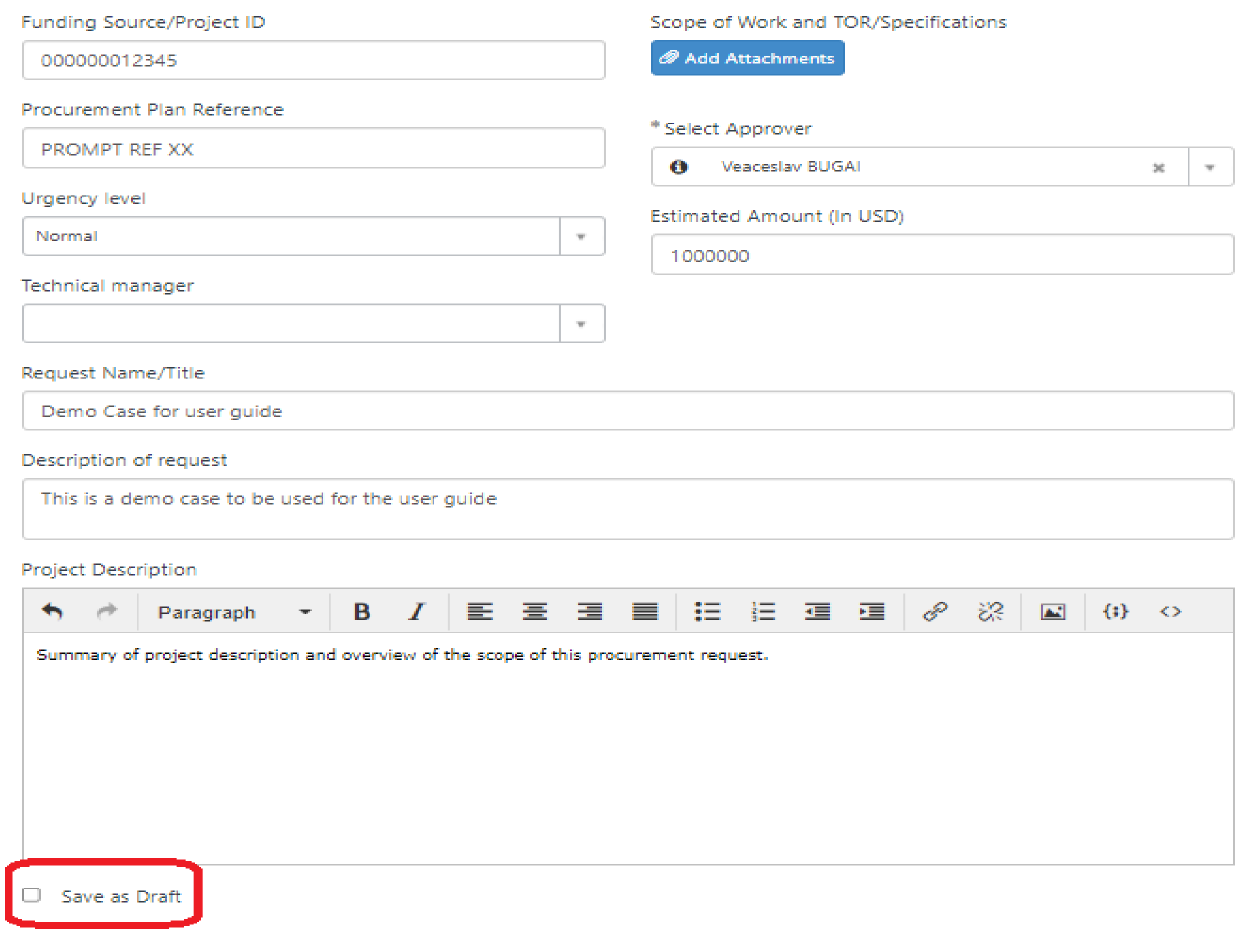
1.1 Create a Procurement Request in UNall



- Select the right approver from list of available approvers.
- Funding source/Project ID: ATLAS project ID
- Procurement plan reference: Reference number from PROMPT.
- Once request is completed, click on “Submit” to send it for approval.
- You can also “Save as Draft” and come later to complete and submit it.

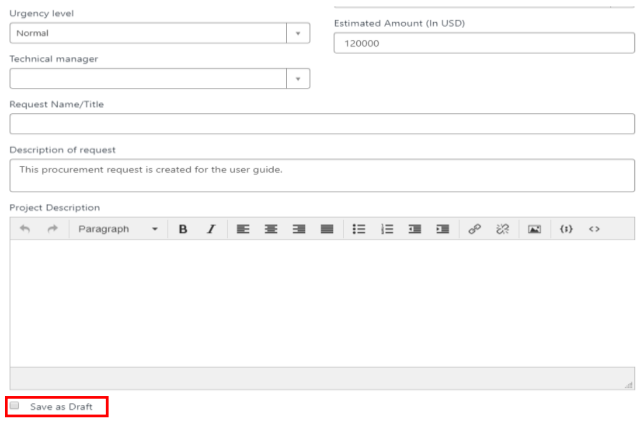
With full deployment of the new system, this step will be integrated with requisition process in Oracle and either streamlined or completely automated in Unall.

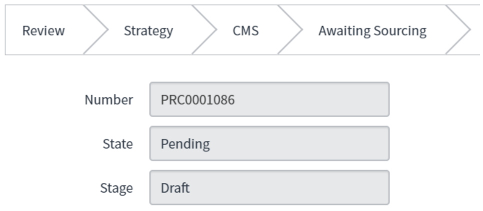
1.1 Save as draft a Procurement request in UNall

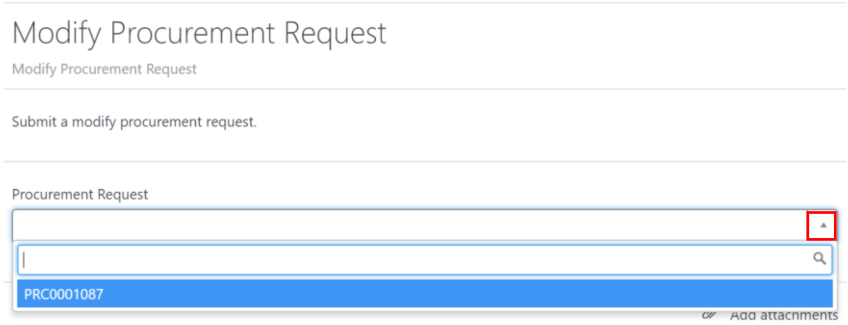
The Request Preparer can save a procurement request as *Draft* and come back later to complete/submit it.
To save a draft version of a procurement request, check the *Save as Draft* box at the bottom of the page and click the button *Submit.* A draft procurement request will be in State – *Pending* and Stage – *Draft* and is **not** submitted to the Procurement Request Approver for approval.

To continue to work on a draft procurement request and be able to submit it for approval, go the UNall portal main page and click on *Procurement* icon .
Click on **+** to expand the Procurement menu, select *Procurement Requests* and then click on *Modify Procurement Request.*
Select the

Click on the *Procurement Request* field and all procurement requests that you saved as draft will be listed. Select the one you wish to complete, add/modify the required info and click on *Submit.*







After saving a procurement request as draft, a notification email will be sent to the Procurement request Approver. Procurement requests saved as draft cannot be approved and those emails should be ignored.

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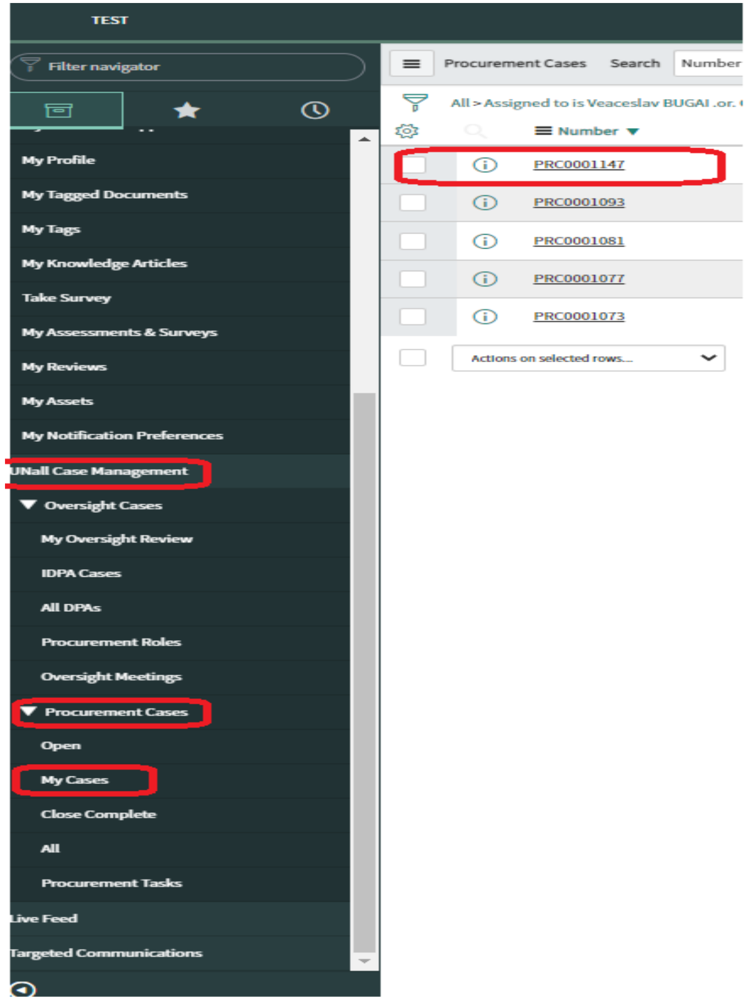
1.2 Approve a Procurement request in UNall



Approver, e.g. Project manager, needs to approve the request in Unall.

Go to Unall >> switch to "***Fulfiller view***"

On the left side menu bar select "***Unall Case Management***" >> "***Procurement Cases***" >> "***My Cases***".

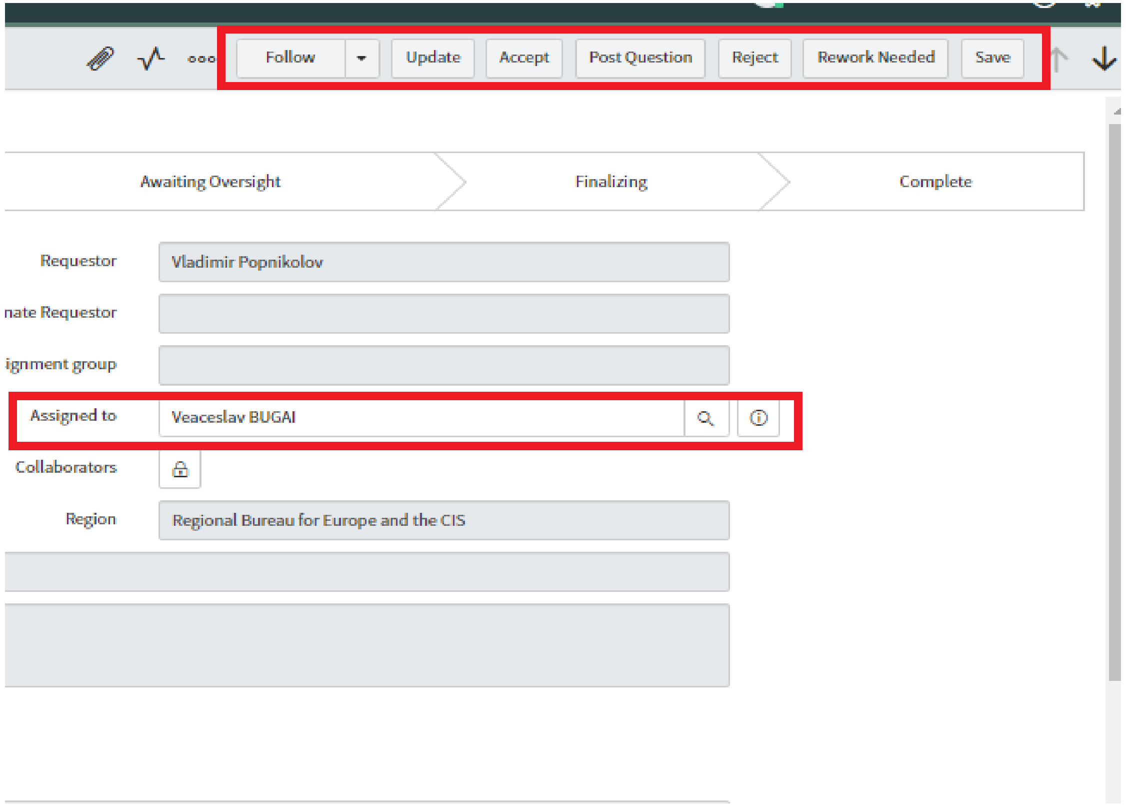
Select the Case ID that needs approval.

1.2 Approve a Procurement request in UNall

Approver reviews request and approves by clicking on "***Accept***".

Other options for approver are:

- ***Reject***: The goods/Services are not required and no procurement action is needed.



- ***Rework needed***: Procurement request is valid but substantial information is missing or not accurate in the request and requester need to re-do the request.
- ***Post Question***: Procurement request is needed, request is generally complete and accurate, but some clarifications are required before approval.

Approver can also forward approval to another person instead by changing the "Assigned to" name.

1.3 Define and complete the Procurement strategy

The next step after a procurement request is approved is to determine the procurement strategy, which is who, how, and when will the requested goods and services be procured.

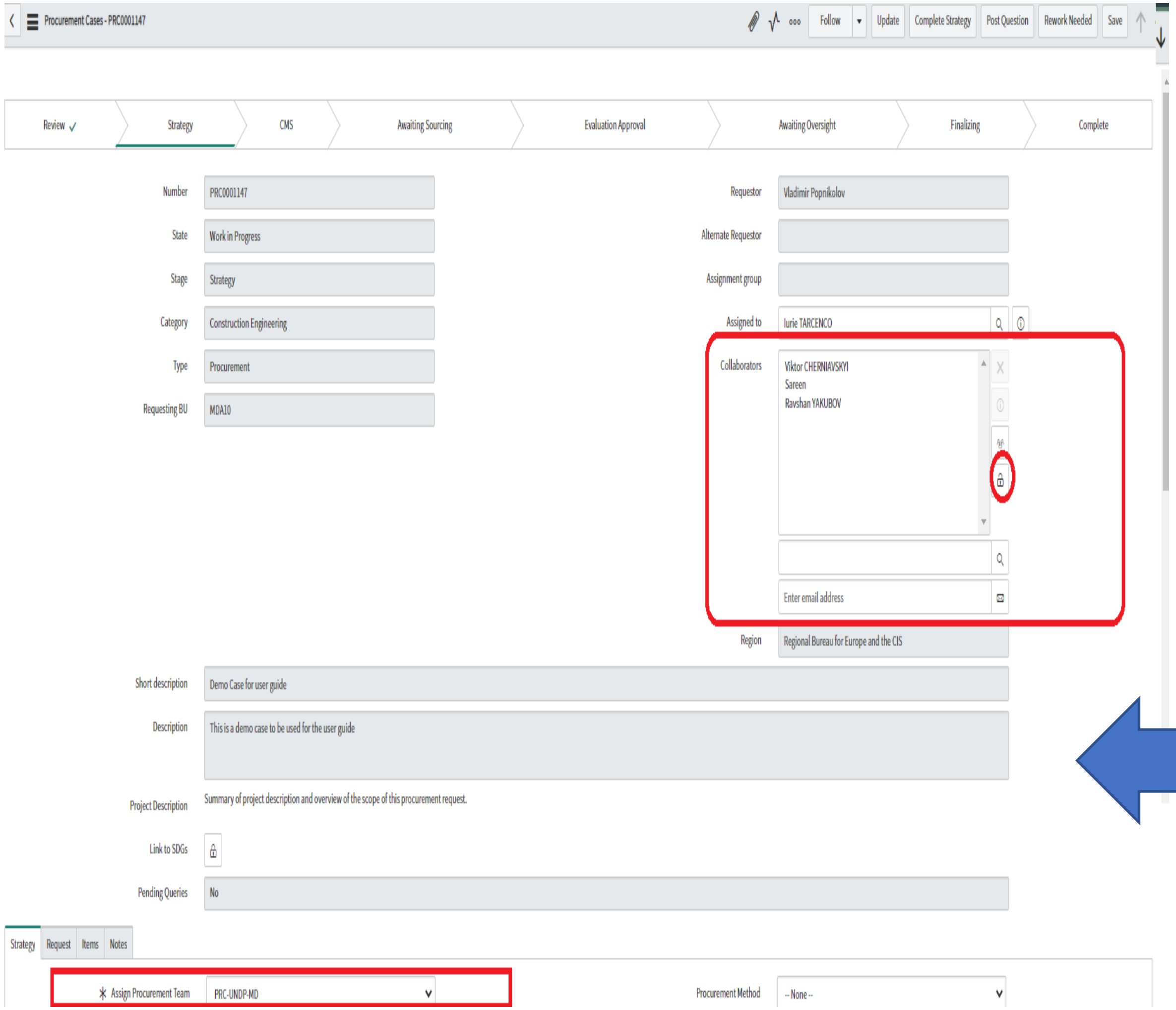
The persons involved in the strategy will depend on nature of goods/services, estimated amount, and procurement tools and resources available to the Business Unit. There are two key steps in the system related to the strategy alignment:

Step 1: Establish the strategy alignment team. In this step it is decided who should be involved in the formulation and approval of the procurement strategy.

Step 2: Define the procurement strategy for the case. How the goods/services will be procured, and who should conduct the process.

With future integrations of UNall with Oracle, many of the decisions taken at strategy step will be automated or enabled by the system to provide users with best possible information and streamline the process.

1.3 Define and complete the Procurement strategy



Typically, the following roles are involved in this step:

1. Head of Procurement/OM/DRR. Will be the main authority representing and approving on behalf of requesting unit.
2. Project Manager representing the project/unit that submitted the request.
3. Regional Procurement Advisors, for procurement of amounts above USD 200,000.
4. Special category manager if requested goods/services fall under one of the specialized categories, e.g. health, elections, etc.
5. Head of the procurement team that the case is assigned to.
6. Other persons can be added as necessary.

- **Add Members in “Collaborators” box.**
- **Select procurement team who will manage the case.**

1.3 Define and complete the Procurement Strategy

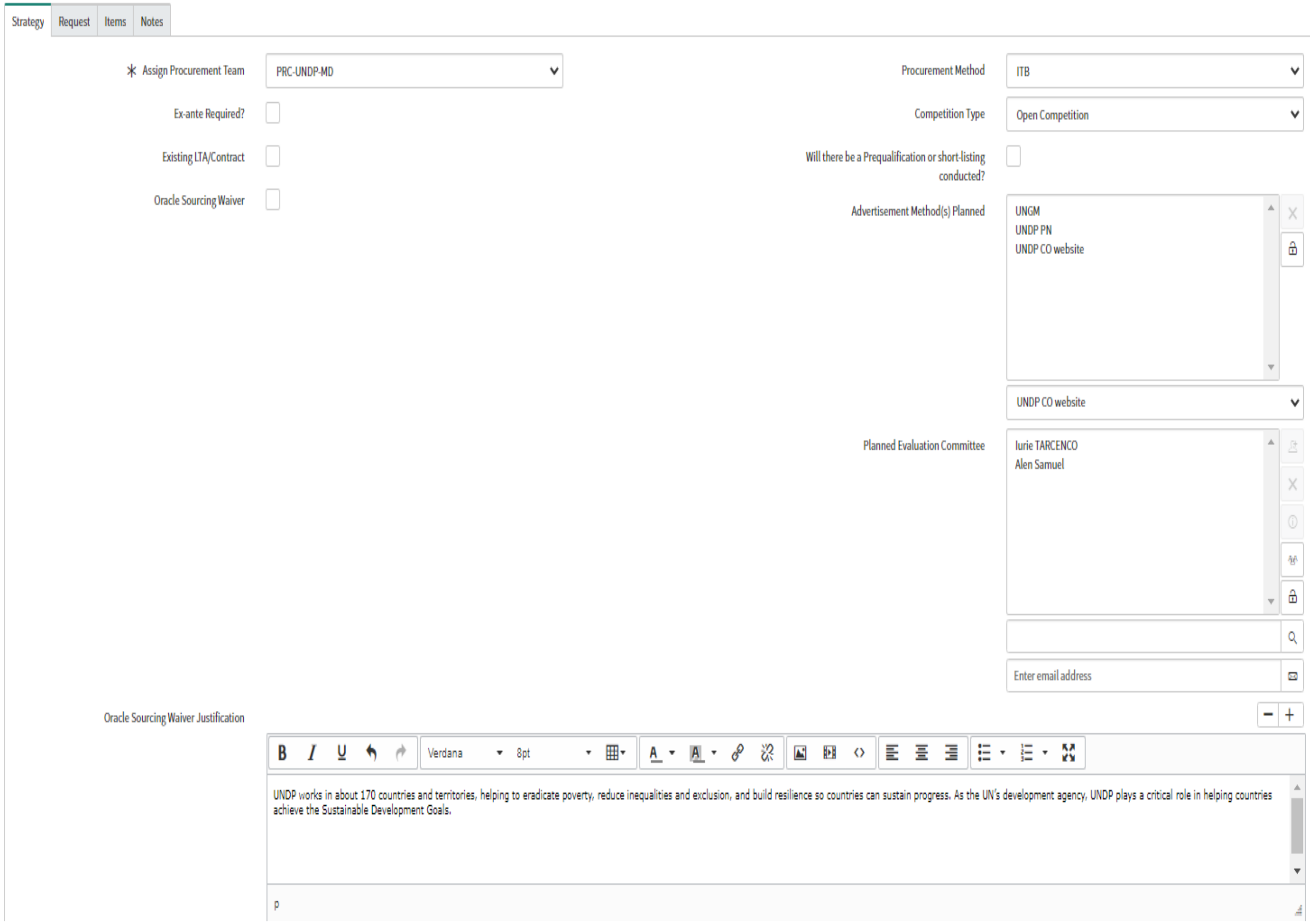
Once the strategy team is established, they decide on the procurement strategy. Some of the key decisions taken in this step are:

1. Whether an LTA is available and can be utilized.
2. Whether an Ex-ante is required. If box is checked, system will route the case to an Ex-ante before proceeding to solicitation.
3. Whether a waiver is in place to not use the online tendering process (Oracle and/or ATLAS eTendering).
4. Select procurement method: ITB, RFP, RFQ, etc.
5. Type of competition: Open, Limited, Local, etc.
6. Whether there will be a pre-qualification/shortlisting conducted as first step.
7. How will the tender be announced.
8. **Planned evaluation committee members.**
9. Additional information on the case, such as: Timelines, quality assurance mechanisms, risk management strategy, etc.

It is possible to split the request in two different procurement actions. For example if the strategy determines to procure some of the items though an existing LTA while some other need to be procured through an open procurement process.

Clicking on “Create Related procurement” will create a second case which then can be adjusted accordingly, e.g. remove some of the lines required, define the specific procurement strategy, etc.

1.3 Define and complete the Procurement strategy



Once the procurement strategy form is completed, the person representing the requesting BU clicks on "***Complete Strategy***" to complete the strategy step.

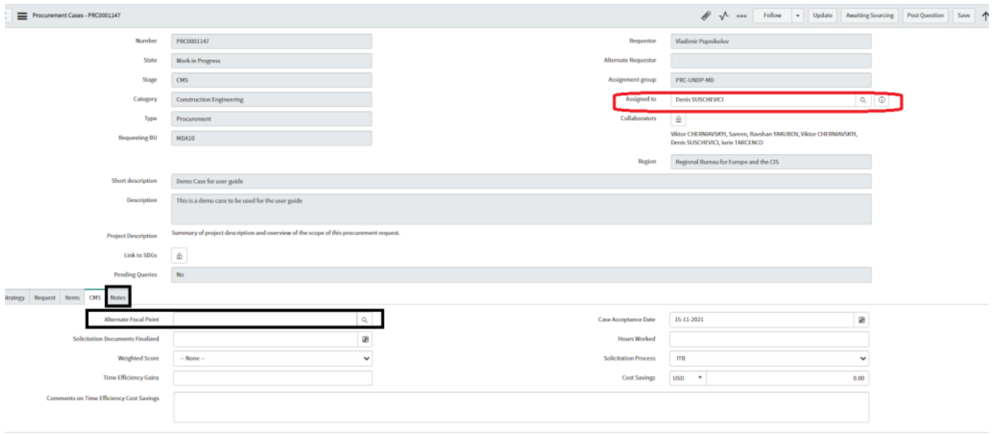
After this case, the case is moved to next step – Case Management – where the procurement team managing the case will take over.

1.4 Case Management System (CMS)

Once *Strategy* step is completed and case assigned to a procurement team, the case moved to CMS stage where the assigned procurement team can further manage the case.
By default, the name of the Head of the Procurement Team (selected at the *Strategy* step) appears in the *Assigned to* field.

As a first step, the Head Of The Procurement Team (HPM) assigns the procurement focal point that will manage the case. The name of the procurement focal point should be selected in the *Assigned to* field.
The HPM may also assign an alternate focal point for the case by selecting the name in the *Alternate Focal Point* field on the CMS tab.

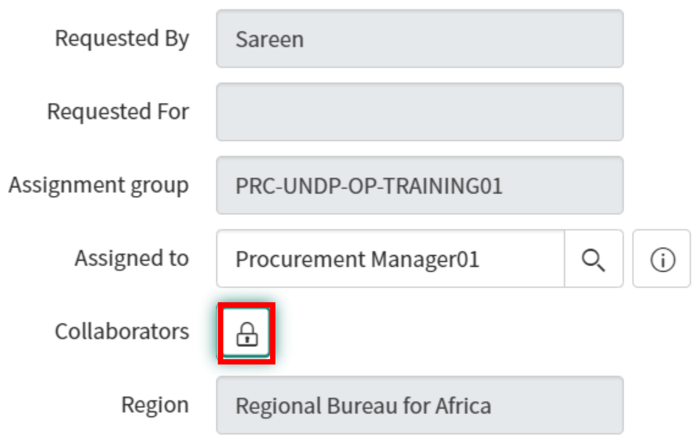
For instructions on how to assign the head of procurement team and team members go to the [Annex: Procurement Roles guide](#).

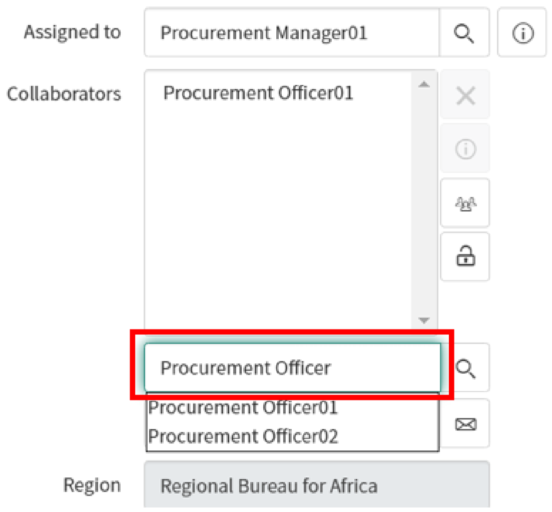


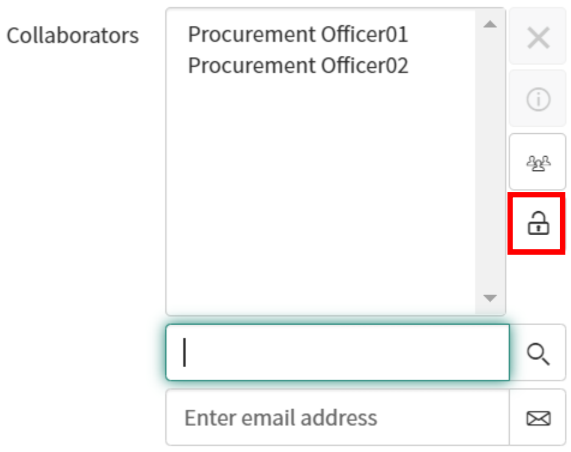
Procurement team can communicate internally and with requesting unit as well using “Notes” feature.
It is important to communicate important messages using this feature for record keeping purpose.

1.4 Case Management System (CMS) – continued

By default, the members of the procurement team (selected at the *Strategy Step)* should appear as *Collaborators.* The users listed as *Collaborators* have full access to the Procurement Case. If a member of the procurement team is not listed in the *Collaborators* field, click the *Unlock Collaborators* icon, enter the name of the procurement team member in the *Search* field and click the name in the search results. The name will be added in the *Collaborators* box. Repeat the search for each user that you wish to add to the Procurement Team. Click the icon *Lock Collaborators* to complete the process and continue with the next steps.

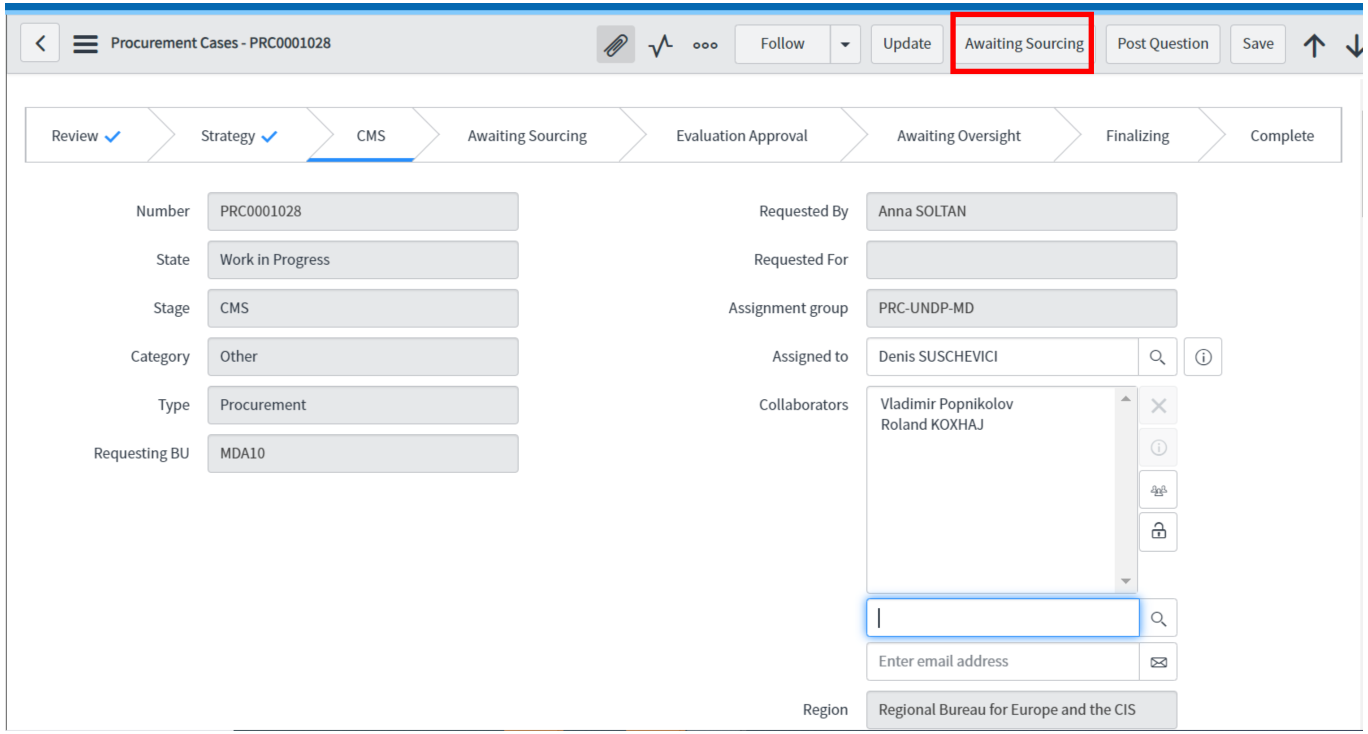






1.4 Case Management System (CMS) – continued

Once the tender has been launched in Quantum, click the button *Awaiting Sourcing* in order to indicate the correct status of the procurement request/case.



QUANTUM

2. Solicitation (Quantum)

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2.1 Solicitation (Quantum) - Introduction

A Fundamental change in how solicitation processes are managed in Quantum is that the Tender document is generated by the system based on the document layout in the system and input by the procurement officer created the solicitation in Quantum. Therefore it is important to plan and prepare the documents needed prior to the creating the solicitation process in the system. Some of the considerations are listed below:

Preliminary Considerations	Relevance for Solicitation Creation
What is the procurement method? Is it ITB, RFP, IC, etc.?	This is important because it will determine which template will be used for the event.
What is the expected contract outcome? E.g. will it be an LTA with price variations based on quantity ranges?	This will determine how suppliers will provide their prices in the offer and how the contract will be setup. Once selected in the system when solicitation is created, it cannot be changed later in the process.
Is it an open or limited competition? If a shortlist exists, was shortlisting process conducted in Quantum?	If the solicitation is a limited competition, the suppliers need to be registered in the system in advance so they can be invited to the tender. If shortlisting was conducted in Quantum, a second round needs to be created on original process instead of a new one.
How is the structure of price schedule? Can it be replicated in full in Quantum or complementary excel tables are necessary?	Price schedule should be ideally built directly in Quantum to allow for streamlined evaluation, creation of contract, etc. In cases of complex price schedules or BoQ, complementary excel tables.
What are the minimum requirements and other evaluation criteria?	Evaluation criteria can be setup in the system and included in the tender document, allowing online evaluation by evaluation team.
Other parameters such as: partial bidding, bid currency, deadline, focal point, etc.	These parameters can be setup directly into the system.

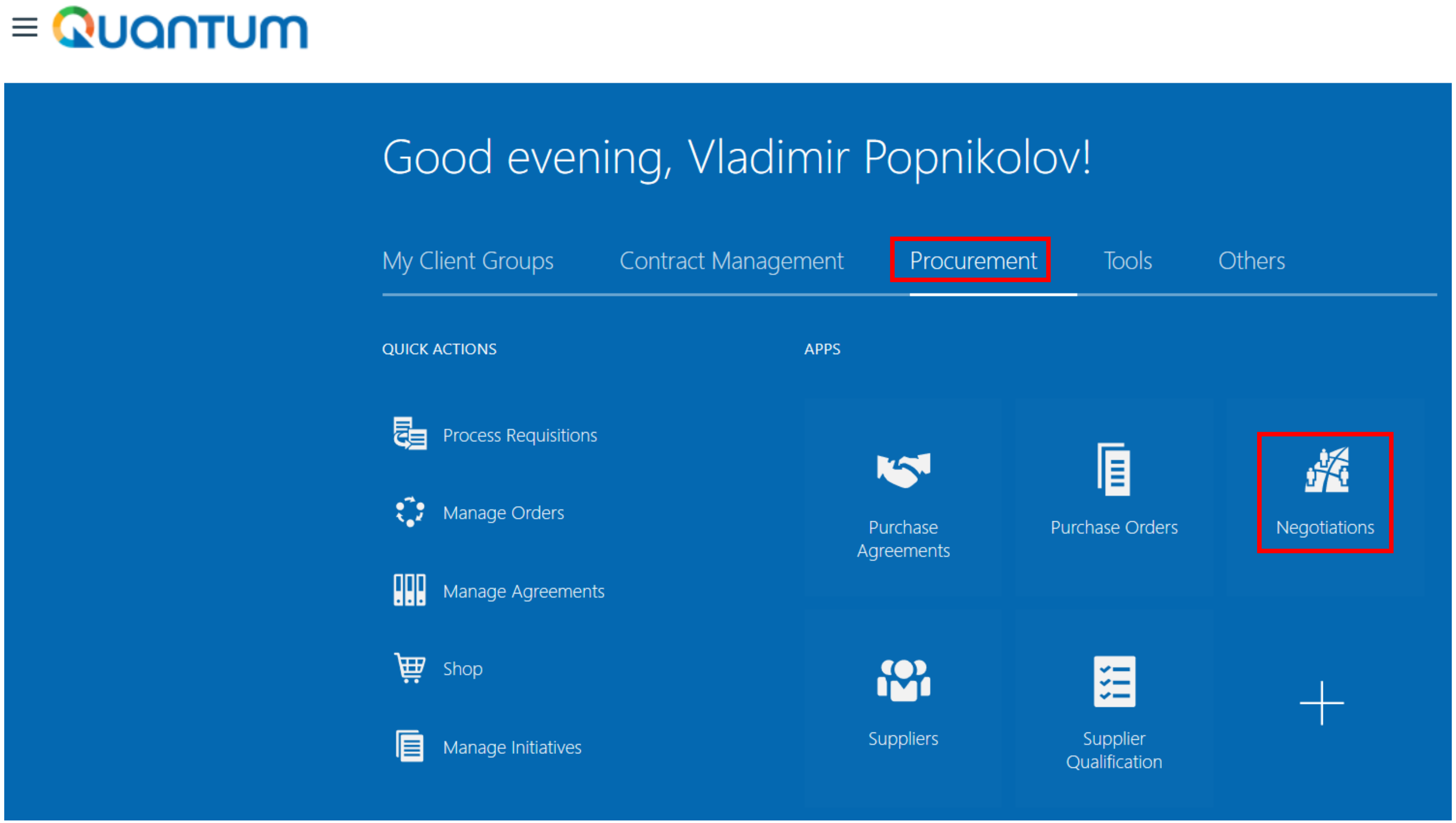
2.2 Prepare Solicitation Documents

In the new Quantum system, solicitation document is generated directly by the system based on inputs and other documents uploaded. Procurement office must prepare several documents in advance in order to finalize the case in the system quickly. Documents and inputs that need to be prepared in advance may vary depending on the tender type and complexity but in general they consist of:

1. **Cover page**: this is the text that will be in the front page of the solicitation document otherwise know as Invitation to Bid/Offer.
2. **Introduction text**: This is a text that will be shown also in the procurement notice and UNGM website (for public tenders).
3. **Bid Data Sheet**: This document is prepared separately in Word/PDF and attached to the case in the system.
4. **Evaluation Criteria**: they are inserted in “Requirements” section in the system and can be inserted either directly in the portal or prepared offline in an excel template and automatically uploaded by procurement officer.
5. **Price Schedule**: they can be inserted directly in the “Lines” section of the system or prepared offline in excel and automatically uploaded by the procurement officer.
6. **Technical specifications and/or ToRs**: They are prepared offline in Word/Excel and attached to the case in the system.
7. **Forms and templates**: They are blank templates or forms that bidders are supposed to complete and return with their offer. They are prepared in Word/Excel and attached to the case in the system.
8. **Other documents**: They can be complementary documents specific to the tender (e.g. drawings) that are attached to the case in the system.

2.3 Create a Solicitation in the System

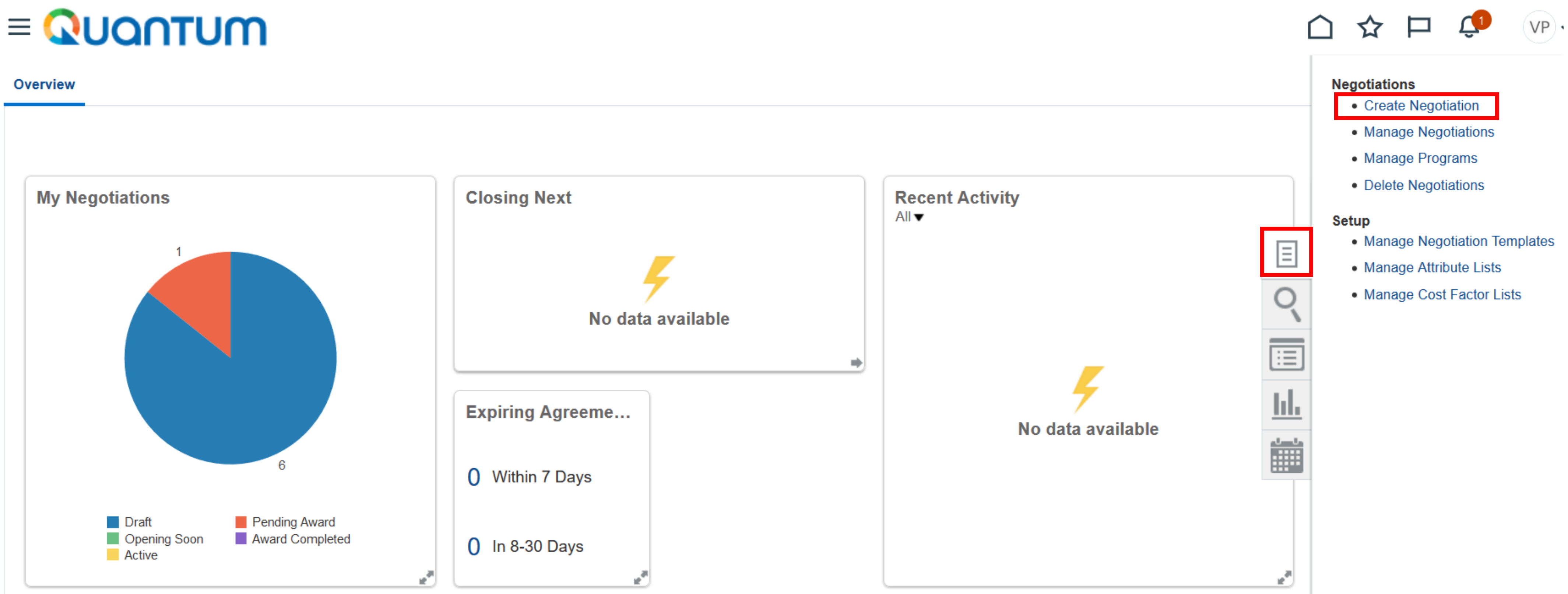
To begin creating a Solicitation in Quantum, log into Oracle using the URL http://quantum.partneragencies.org/, go to main/home page, select ***Procurement*** and then Click on ***Negotiations Tab****.*



Only procurement officers with the right procurement roles will have access to this page.

2.3 Create a Solicitation in the System

Click on “***Tasks***” icon to expand it and then click on “***Create Negotiation***”.



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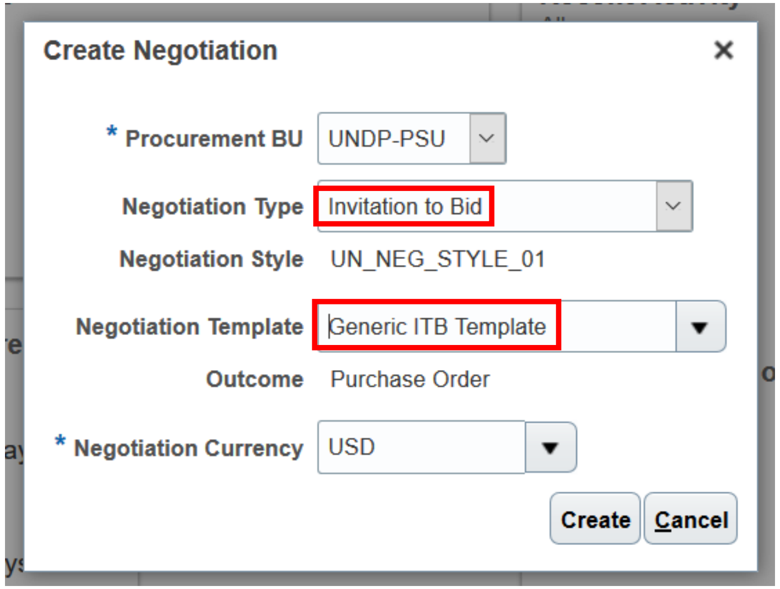
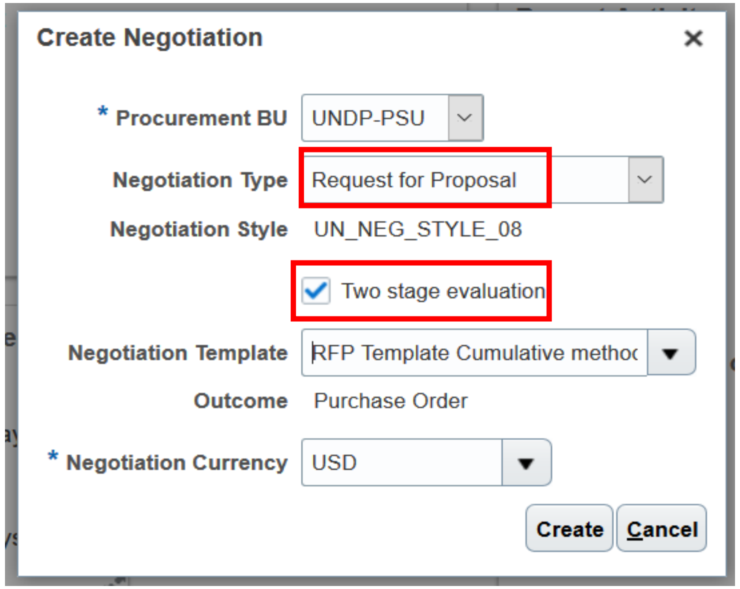
2.3 Create a Solicitation in the System





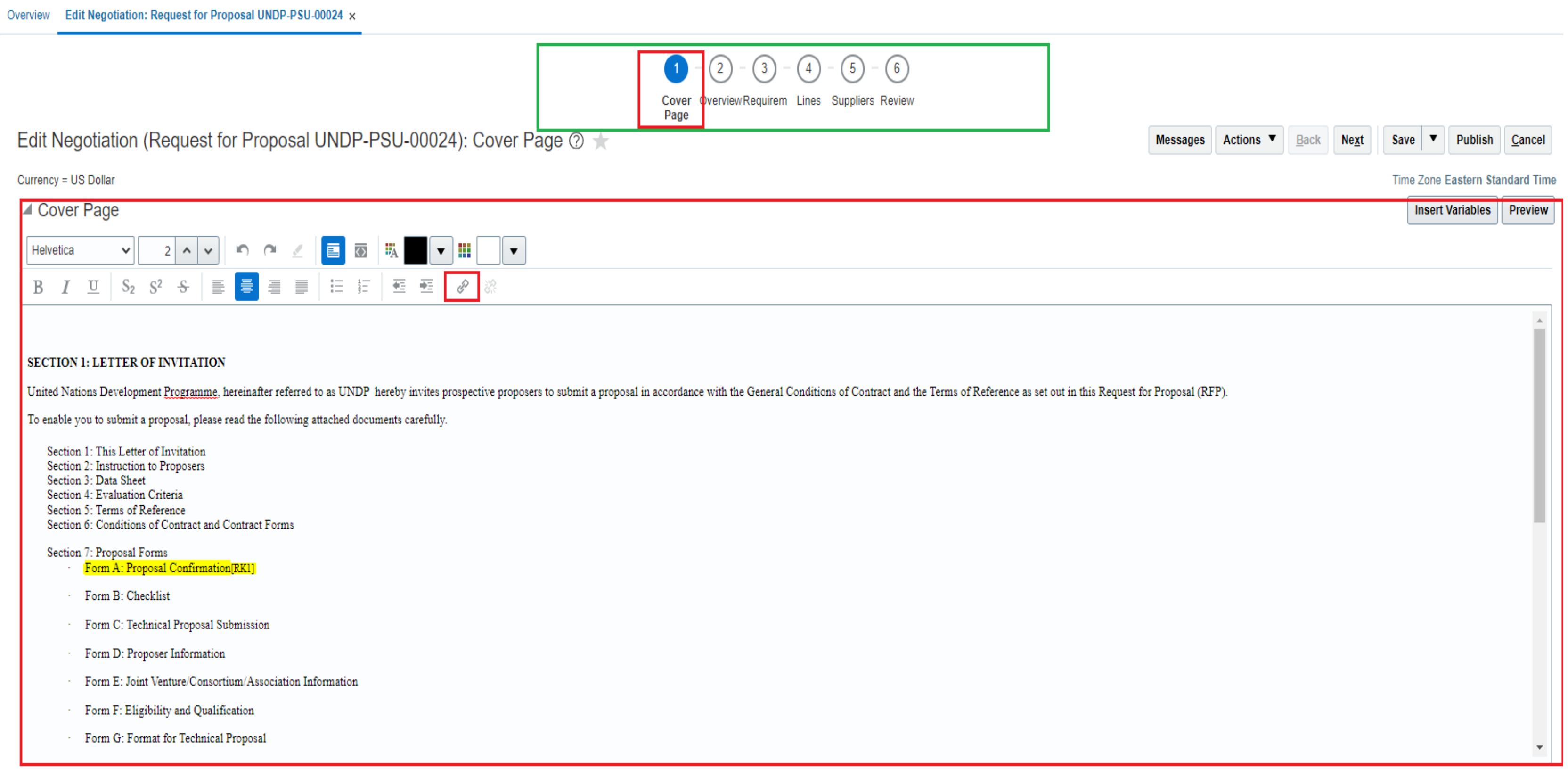
1. Select:
- BU of office managing the tender.
- Negotiation type (ITB, RFP, RFQ, etc.)
- System template
- Main tender currency

2. Click "***Create***"

Visit the section on solicitation types and templates to review full list and descriptions. When "Two stage evaluation" is selected, bid information entered in lines and commercial sections will not be accessible by evaluation team until technical evaluation is completed. Typically used for Request for Proposal (RFP) tenders.

2.3.1 Create a Solicitation in the System (train stop 1: Cover Page)

Write letter of invitation in the "***Cover Page***" text box.

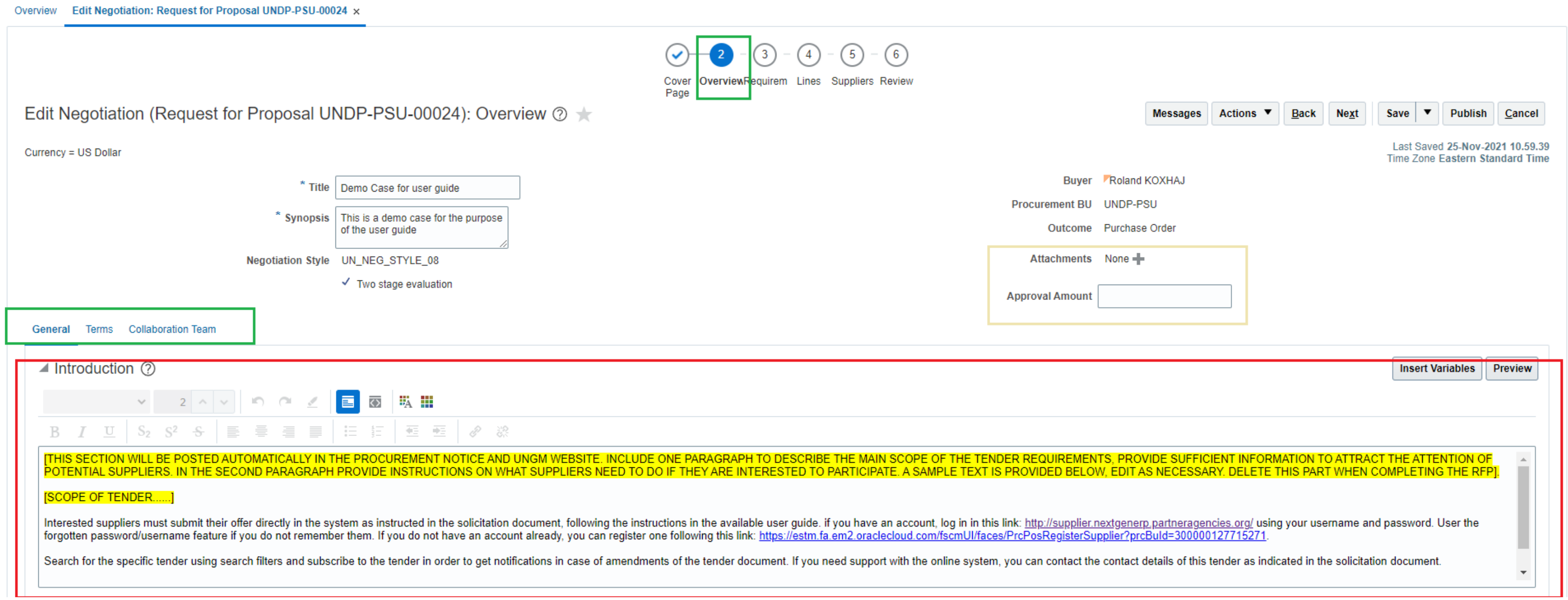


- You can copy from Word if you have prepared the text in advance.
- If you want to insert links, insert using the "Insert link" button.

2.3.2 Create a Solicitation in the System (train stop 2: Overview)

Complete general tender information:

- **Title**: Tender title indicating what the tender is about. Do not put Reference numbers.
- **Synopsis**: Brief overview of the tender.
- **Approval amount**: Estimated amount of the tender.
- **Attachments**: General attachments, e.g. system user guide, etc. Be aware that some of the documents referred in xxxxxx are attached in the requirement sections in next train stop.
- **Introduction**: Brief summary of the tender scope providing sufficient information on what UNDP is intending to procure and instructions on how interested suppliers can participate. This is the text that will be show in procurement notice and UNGM websites.

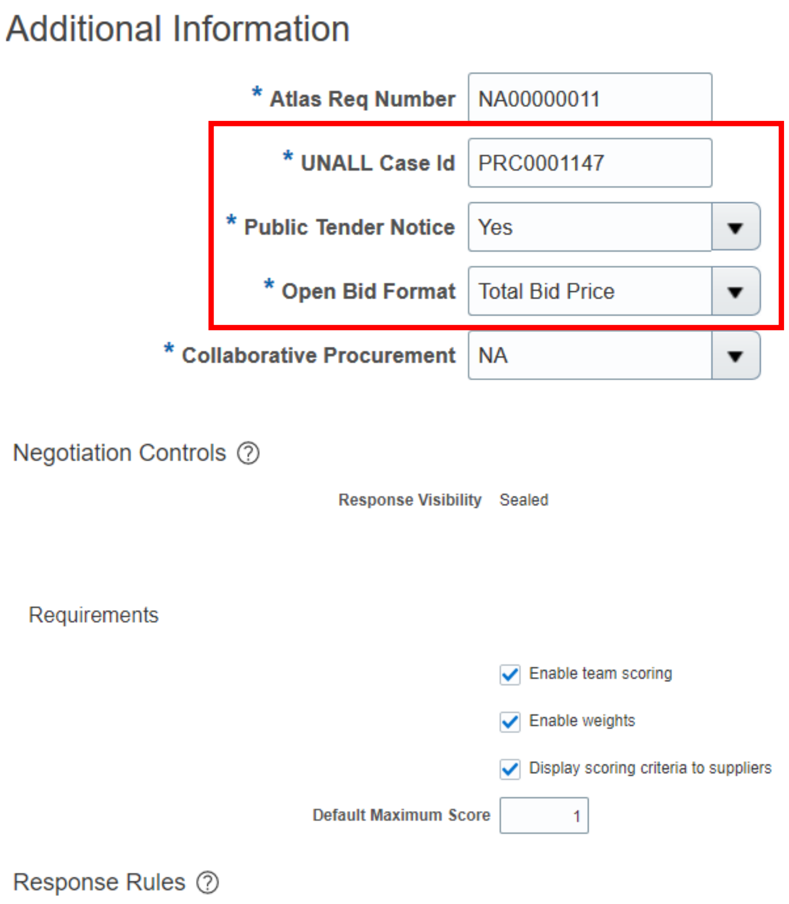


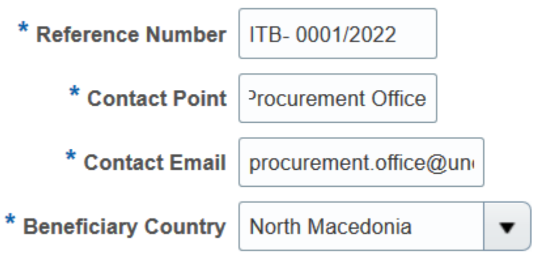
2.3.2 Create a Solicitation in the System (train stop 2: Overview -cont.)

Complete additional information:

- **ATLAS req Number**: a temporary field until full deployment of Quantum.
- **UNALL Case ID**: Very important to provide the correct ID as it will enable integration with Unall Case management.
- **Public Tender Notice**: Selecting "Yes" will enable automatic notice creation in procurement notice and UNGM website.
- **Open Bid format**: Type of Public Bid Opening.
    - Not Applicable : no Bid opening will be created
    - Total Bid Price : Bid Opening will be sent showing total bid price.
    - Total per each LOT: Bid Opening report will be sent showing total price per each LOT.
- **Reference Number**: Internal office reference number for the tender.
- **Contact Point**: Name/office serving as contact point for bidders participating to the tender
- **Contact email**: Email address where bidders can communicate about the tender. Important: Bidders are instructed to channel communication through the system. This email is to be used only when bidders cannot write via the system messaging tool. Instruct the same to bidders in BDS, pre-bid meetings, and other communications.
- **Beneficiary Country**: Country where goods/services are sent/consumed. Wil be shown in same corresponding field in procurement notice and UNGM websites.

2.3.2 Create a Solicitation in the System (train stop 2: Overview cont.)





ion by

evaluation team

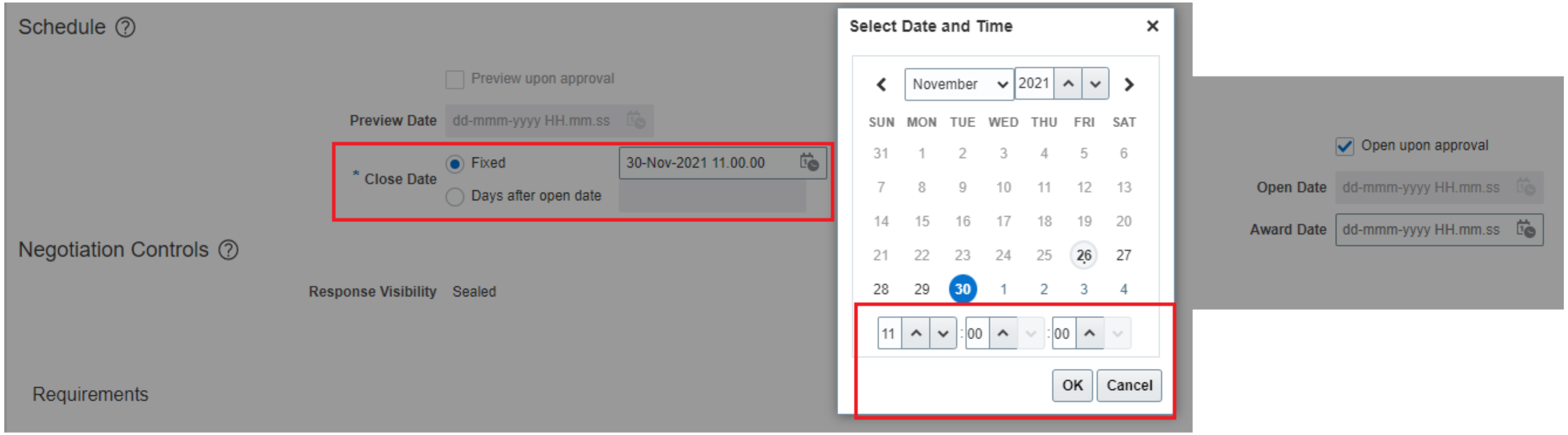
- ➢ Enable weights: allow using weighting point system. E.g. for RFPs.
- ➢ Display scoring criteria to suppliers: will show evaluation criteria to suppliers

2.3.2 Create a Solicitation in the System (train stop 2: Overview cont.)

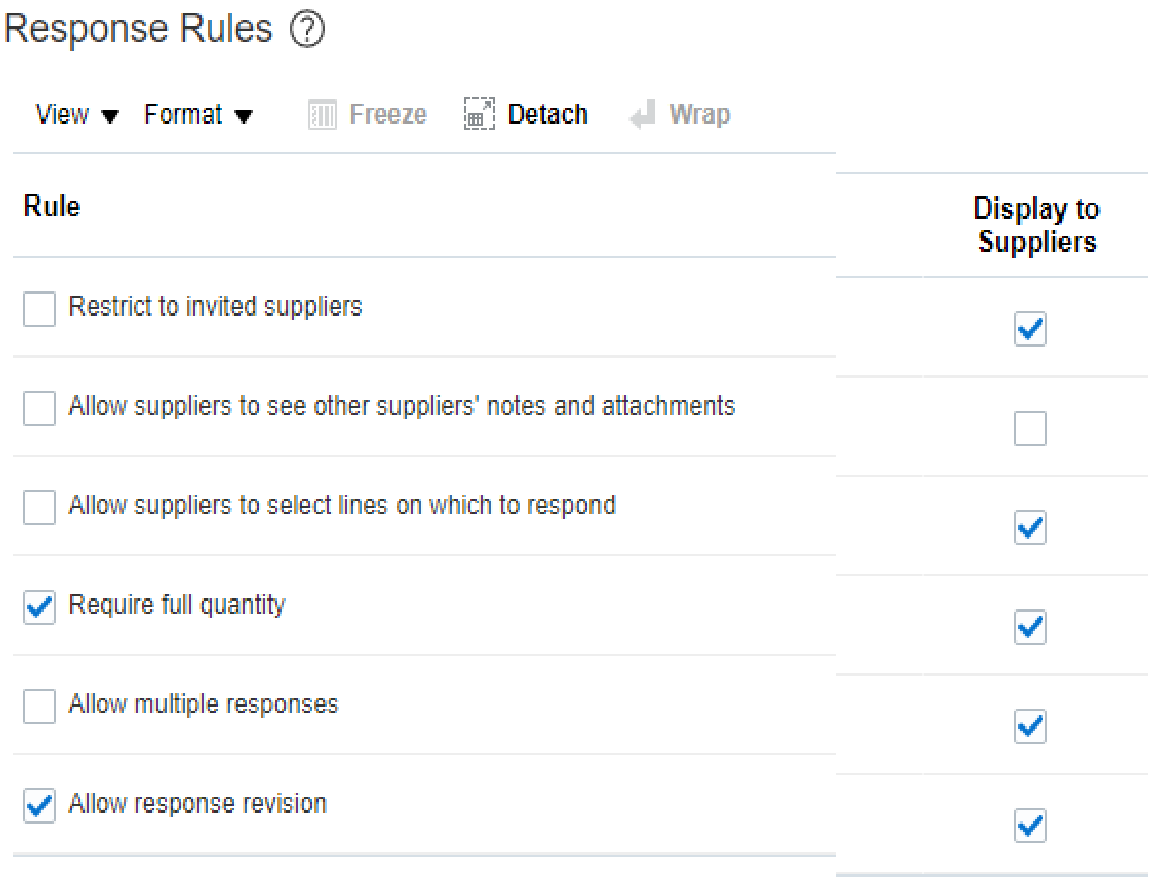
Select tender deadline using calendar feature. Remember that the system default time zone is UCT unless you have changed it in your user preferences section.

For instructions on how to set the time zone in which you operate, go to this [Annex.](#) Once you set your preferred time zone, the closing time of a solicitation will appear in the same time zone (no need to convert it).

IMPORTANT: ALWAYS SET THE CLOSING TIME TO BE WITHIN THE WORKING HOURS.



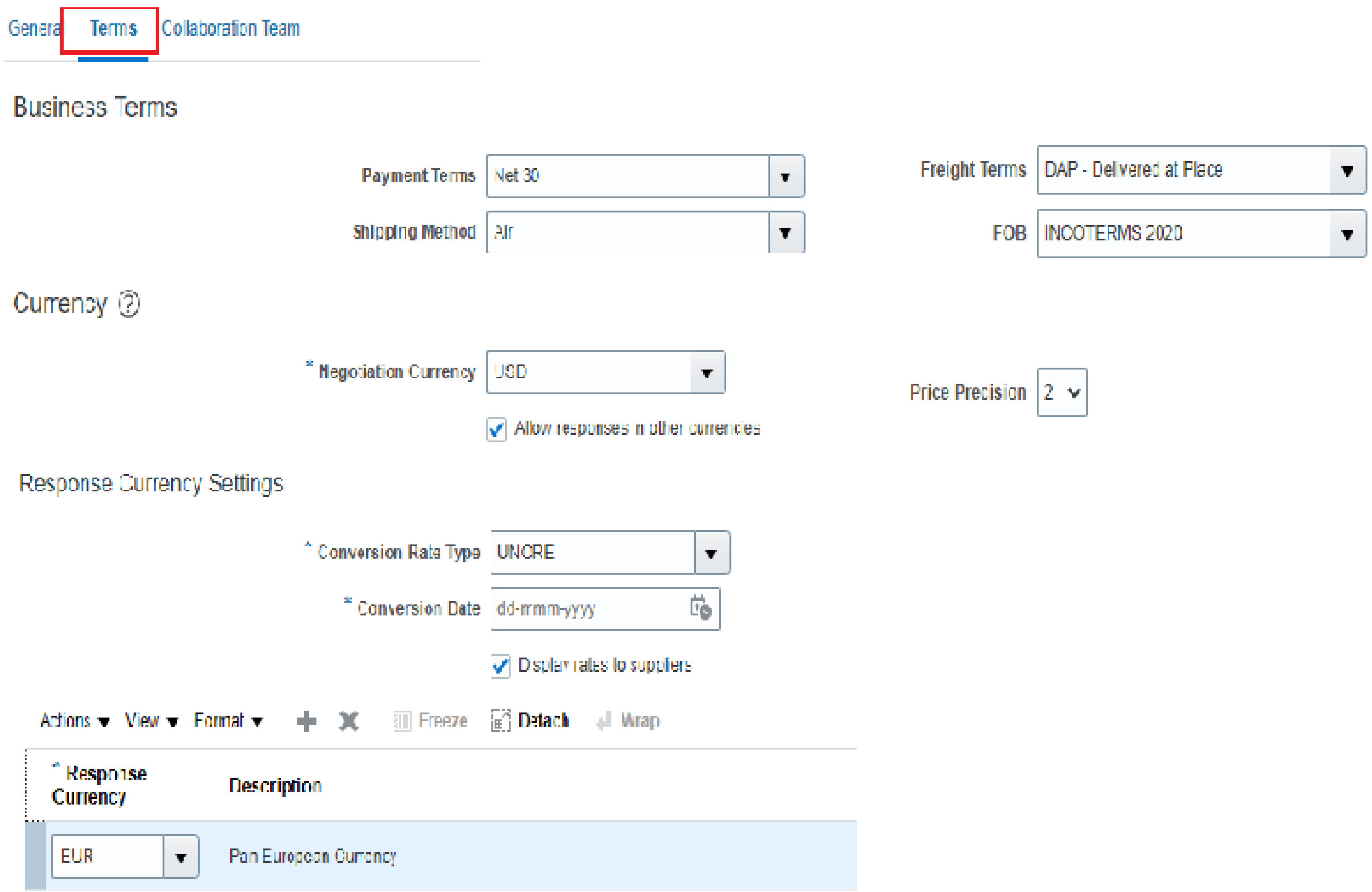
2.3.2 Create a Solicitation in the System (train stop 2 continued)



Scroll down to select Response rules:

- Restrict to invited suppliers: If checked, only invited suppliers can see and participate in tender.
- Allow suppliers to select lines on which to respond: if checked system will allow suppliers to quote only on selected lines.
- Require full quantity: If not checked, system will allow suppliers to change the quantity requested and quote for a different quantity.
- Allow multiple responses: if checked system will allow suppliers to provide alternative offers.
- Allow response revision: If not checked, system will not allow suppliers to revise their offer once submitted. MUST BE CHECKED ALWAYS.
- Display to suppliers: if checked suppliers will be able to see the response rules setup by the procurement officer.

2.3.2 Create a Solicitation in the System (train stop 2: Overview cont.)



Select Applicable Business **Terms**:

- Freight Terms: Select applicable INCOTERM.
- Select if addition currencies are allowed and specify which one.
- Price precision: How many decimals system will allow supplier to user for their unit prices.

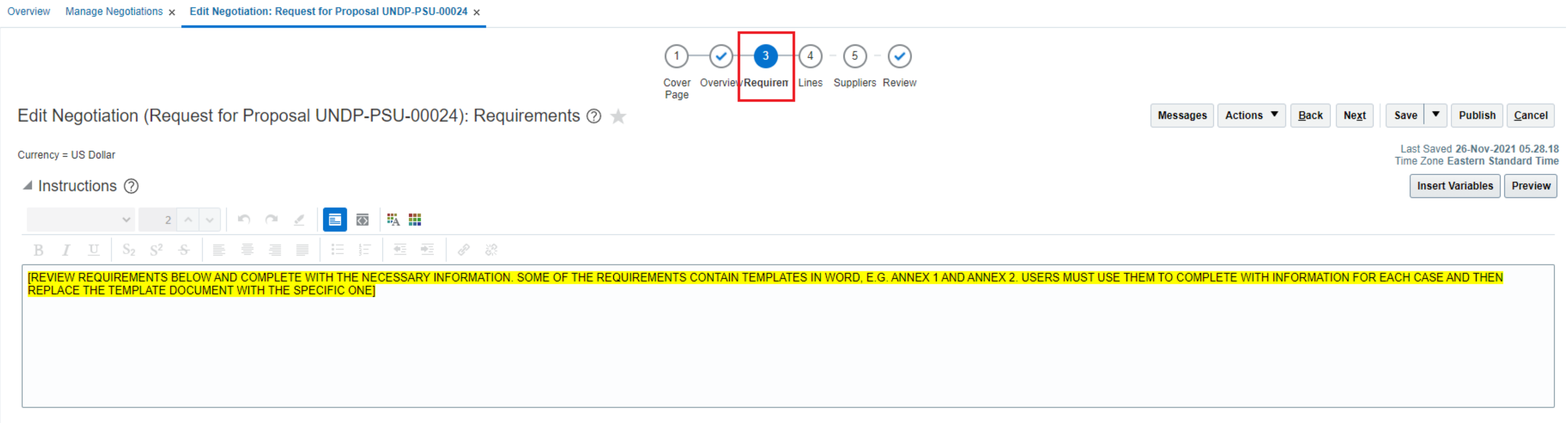
2.3.3 Create a Solicitation in the System (train stop 3: Requirements)

Requirements refer to questions setup in the system some of which suppliers must respond to. Each template includes a set of pre-defined questions which will serve as the basis but procurement office must review and update as needed per each specific case by either editing the text and/or type, remove, or add new requirements.

Requirements are grouped into "Sections" each containing one or more requirements. For more information on the type of requirements read this.

All questions will be visible to supplier and captured in the solicitation document system generates, except for requirements that are marked as internal.

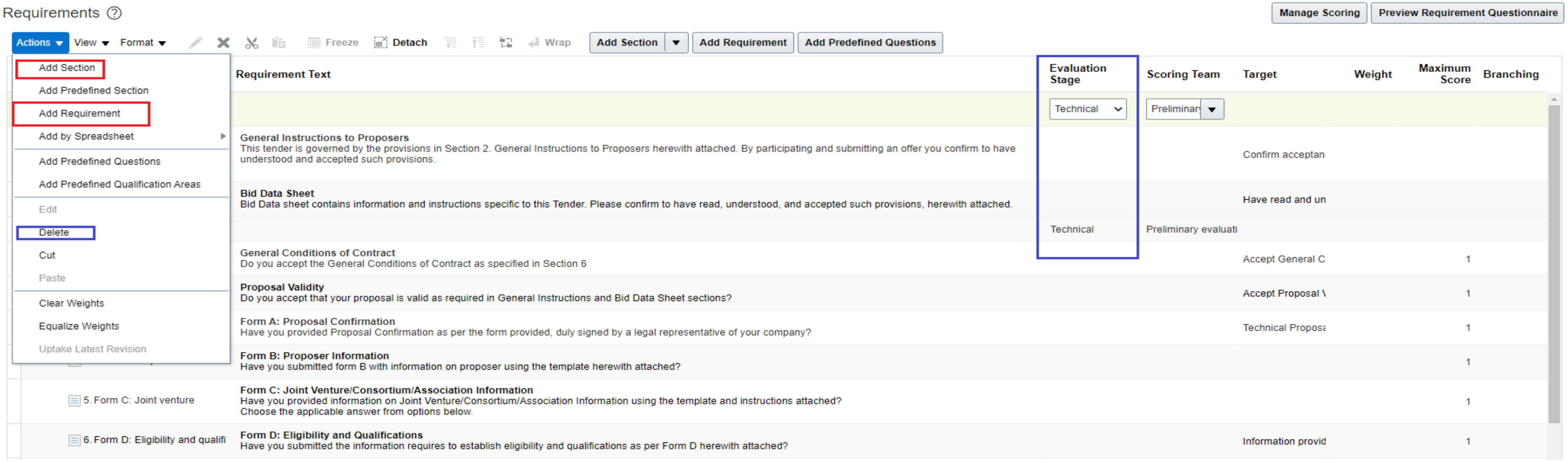
Users can also prepare the requirements using the excel template and add them in the negotiation utilizing the Excel Upload function. This function is explained in this [Annex](#) of this user guide.



2.3.3 Create a Solicitation in the System (train stop 3: Requirements continued)

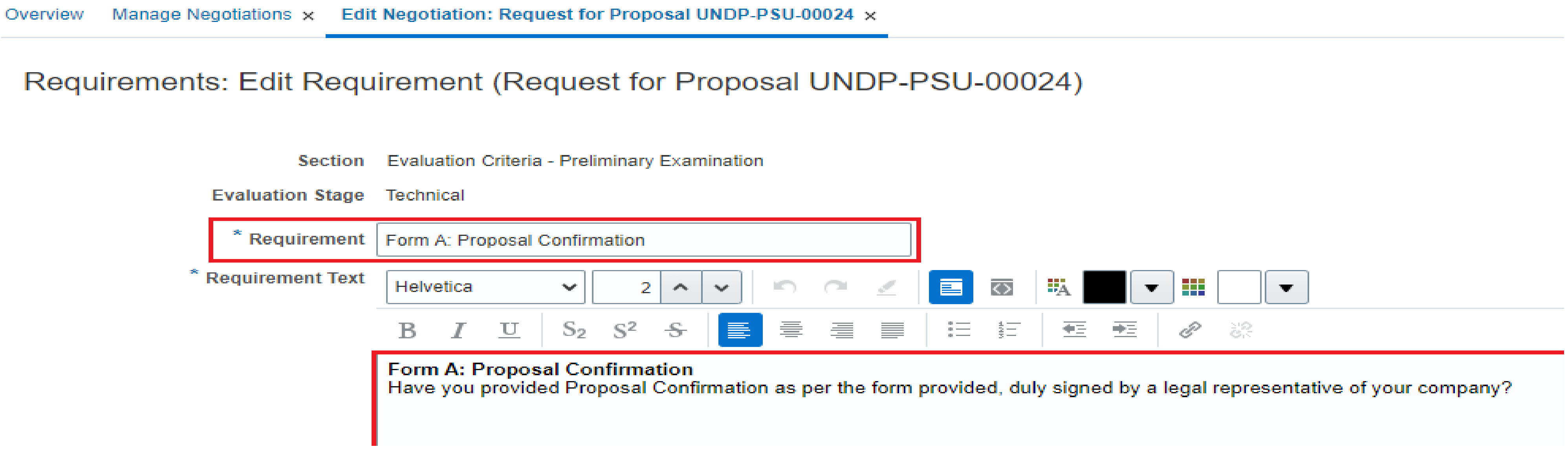
- To add a new section, select an existing section that will precede the new one and click “***Add Section***”.
- To add a new requirement, select existing requirement that will precede the new one and click on “***Add Requirement***”.
- To delete or edit an existing section or requirement, select it and click “***Delete***” or “***Edit***”.

If “Technical” is selected under “***Evaluation Stage***” then bid responses will be available to evaluation team after bids are opened. If “Commercial” is selected, then that section will be available only after technical evaluation is completed.



2.3.3 Create a Solicitation in the System (train stop 3: Requirements continued)

- Type **Requirement** title.
- Repeat requirement title in bold in the text box.
- Type in the question or instruction in the text box. It is important that the question is formulated clearly and aligned with the type of question.



Alternatively, you can [prepare/edit the requirements in Excel offline] and upload them into the system.

2.3.3 Create a Solicitation in the System (train stop 3: Requirements - continued)

Some of the key requirement settings, and how they can be used is explained below.

- Response required: System will require that supplier provides a response to the question. Can be used to collect information from suppliers in the form of responses or attachments or both. Is the most common setting.
- Response Display only: Only display information. Suppliers are not required to respond.
- Response Optional: Suppliers can provide information but are not obliged to provide a response for these type of requirement.
- Response Internal: visible only internally.

- Requirement type Multiple choice with single selection: Sets up a question with one or more options from which the suppliers can choose as response. Options are defined in “Acceptable Value” section.
- Requirement type Multiple choice with multiple selections: sets up a question with several options from which the supplier can select one ore more as response. Options are defined in “Acceptable Value” section.
- Requirement type text entry box: Enables more settings under “Value type” field:
    - Single line text: supplier can write a short text as a response
    - Multiple line text: supplier can write a long text as a response.
    - Number: supplier can provide a number as a response
    - Date: Supplier can provide a specific date as a response

- Scoring: Indicates how response will be scored at evaluation stage:
    - None: there will be no scoring for the requirement.
    - Automatic: System will score each requirement based on response by supplier and score defined in acceptable value section. Should not be used.
    - Manual: Scoring is conducted manually by evaluation team.

2.3.3 Create a Solicitation in the System (train stop 3: Requirements – continued)

- Weight: indicates the weight assigned to the requirement (in%) which the system will use to calculate total score at evaluation. Typically used for RFPs. Total sum of weights for all requirements must be 100.
- Maximum score: sets the maximum points that can be given to the response. For Pass/Fail criteria it should be set as 1. For RFP technical evaluation criteria it should match the scoring grid in the ToR and evaluation criteria section.
- Knockout score: sets the minimum required score which supplier must meet in order to qualify. E.g. for Pass/Fail criteria with maximum score as 1, knockout criteria is 1. For RFP technical evaluation criteria with maximum points 1000, knockout criteria is set as 700. Be aware to use this when really applicable for important criteria. At evaluation stage, system will allow buyer to apply knockout criteria which will automatically shortlist offers that passed this score.
- Attachments: used to upload attachments for suppliers. For example, templates and forms they need to use to provide their response, ToRs, etc.

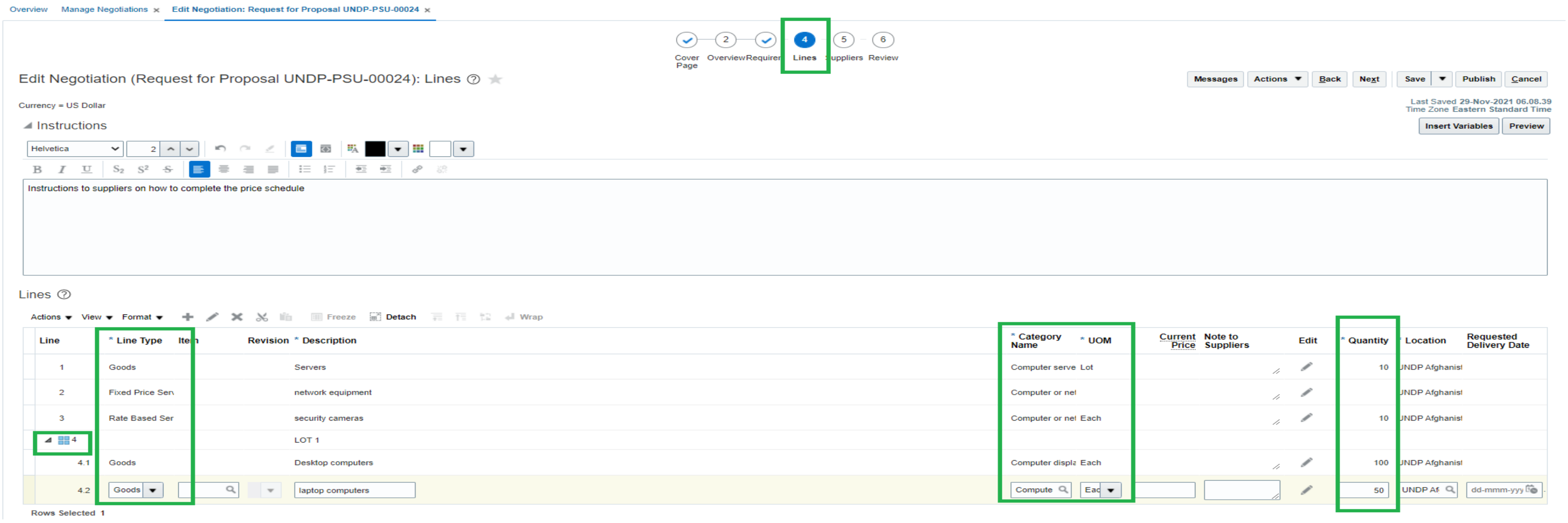
Acceptable value is enabled for multiple choice type of requirements. You can set one or more acceptable values. For each value, you can define whether suppliers must upload an attachment (Required), can but not obliged to upload an attachment (optional), or cannot upload any attachments (not allowed).

You can select one of the values and set it as target: select the value then click “Actions” and select “Set as Target”. This will define the particular value as the only acceptable response. Do not use this feature unless you are sure that is needed. **Any response that does not match the target will be disqualified automatically by the system.**

2.3.4 Create a Solicitation in the System (train stop 4: Lines)

Buyer completes the price schedule under "***Lines***" train stop. Users are required to replicate the price schedule in full in the system as this streamline bidding and evaluation process, Contract Creation, avoid mathematical errors, etc. There are three ways how to create price schedule in the system:

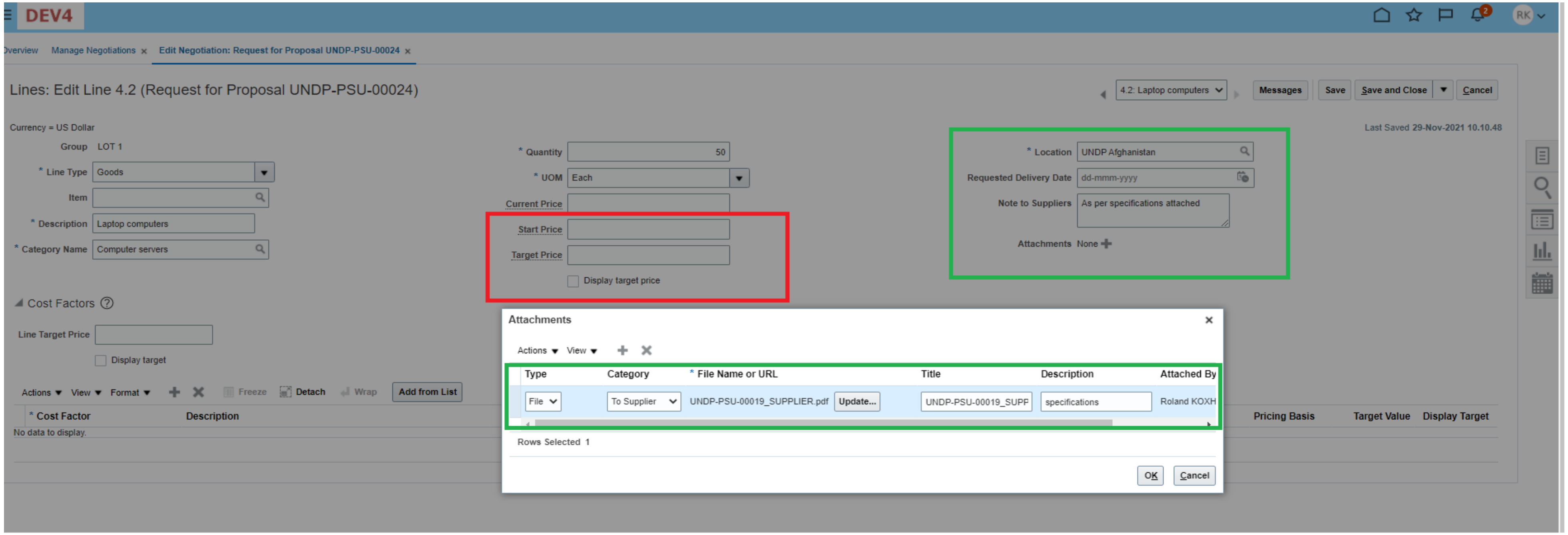
1. Inserting directly into negotiation line section.
2. Import from requisition. This will be available in phase 2 when full system is deployed.
3. Use excel upload functionality.



2.3.4 Create a Solicitation in the System (train stop 4: Lines – cont.)

Buyer can go to detailed line edit mode by selecting the line and clicking on "***Edit***". Here buyer can edit and/or provide additional information on the line and attach documents specific to that line.

Never insert any value under fields "Start Price", "Target Price" and "Display Target Price".



2.3.4 Create a Solicitation in the System (train stop 4 : Lines – cont.)

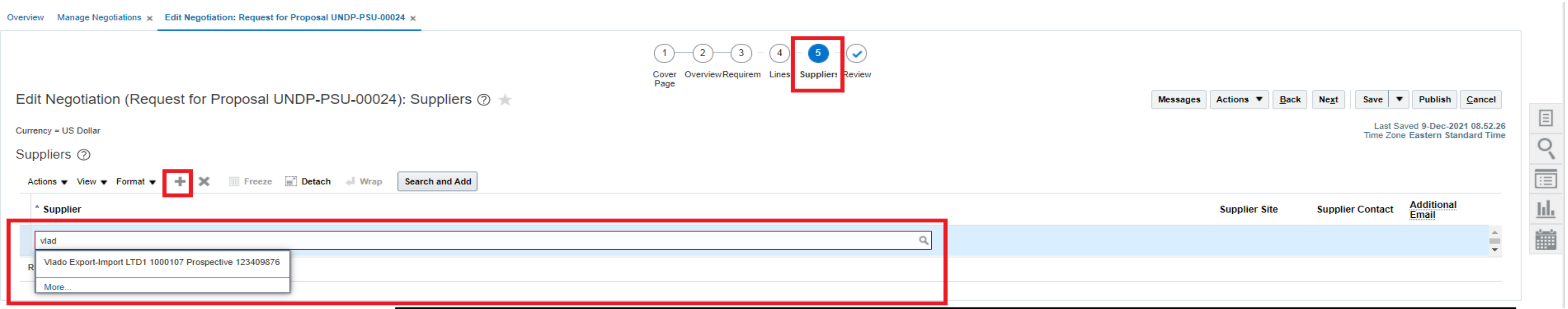
This section explains the values under line items and how they can be used as part of price schedule.

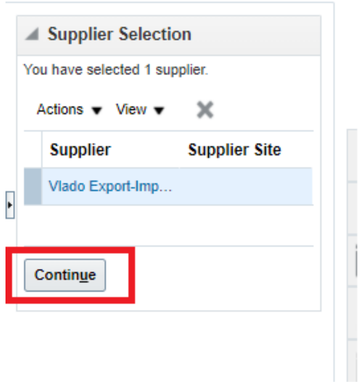
- Instructions: Text box where you can write instructions to suppliers on how they can complete and submit the price schedule.
- Actions: Contains system actions for lines, such as add, edit, delete, etc.
- Line: Sequential number for the lines. Inserted automatically by the system. If make sure the sequential number of the lines here matches with numbering in other documents, e.g. excel price sheet, specifications sheet, etc.
- Line type: defines what type which controls how quantities and prices are defined:
  - Goods: used for goods. Requires buyer to define quantity and UOM and supplier provides price per unit.
  - Fixed price Service: typically for services. Buyer cannot define quantity or UOM. Supplier will provide a lumpsum price for the line.
  - Rate Based Service: typically for services based on quantities, e.g. translation services paid by hours. Buyer can define quantity and UOM and supplier provides price per unit.
- Item: Lookup from Items' Master List. Not configured yet.
- Description: Description of the line item. Pre-defined text not editable if selecting from Master List. Free text if selecting on Category level.
- Category Name: Lookup from existing categories in the system. Based on UNSPCC codes
- UOM: Unit of measure values based on existing defined values.
- Note to suppliers: Free text notes to share specific notes/instructions with suppliers.
- Quantity: numeric value for quantity.
- Location: where goods need to be delivered. Lookup values based on existing UNDP offices.

"GROUP" type of line item. Used for LOTs. The first level as Group will specify the LOT where buyer can only define LOT description. Lines can be added underneath the LOT where buyer can define the items composing each LOT.

2.3.5 Create a Solicitation in the System (train stop 5: Suppliers)

For open competition tenders there is no need to select any specific supplier and case can be launched without any.
Procurement officer can though add suppliers identified who can potentially supplier the required goods and services as that would send them a direct notification from the system when negotiation is launched.





To add suppliers, click on + or “Action” >> “Add Row” or “Search and Add” and search for the supplier's name. click on “Add selected supplier” to add to supplier selection box.

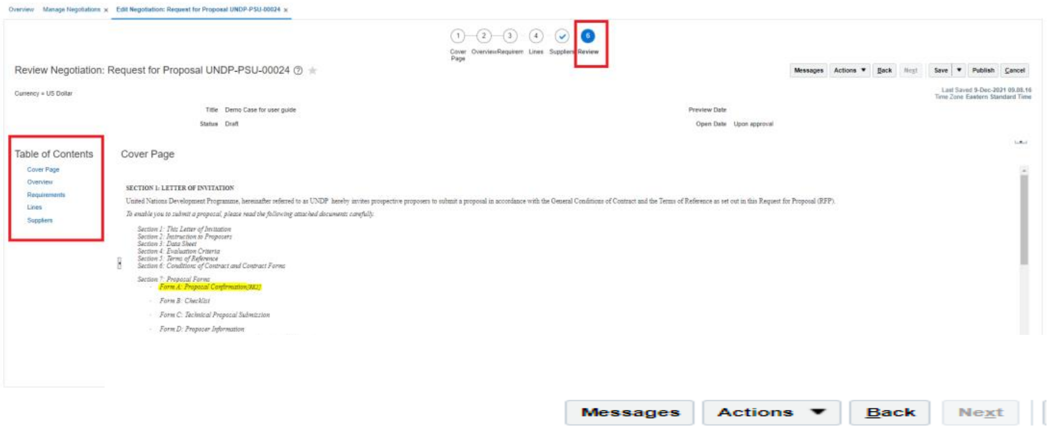
Once all suppliers have been added to “supplier selection” box, click “Continue” to add them to negotiation and continue to next step.

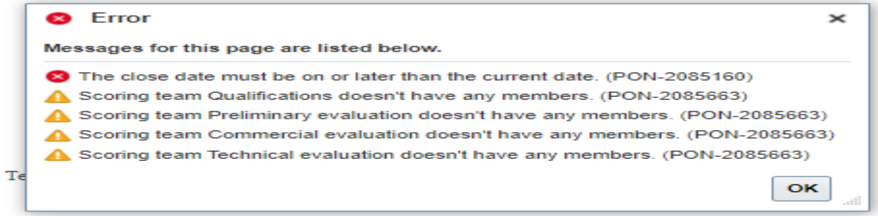
Supplier need to be registered in the system before they can be invited to a negotiation. For negotiations with limited competition, procurement office must contact shortlisted suppliers and request them to register in advance.

2.3.6 Create a Solicitation in the System (train stop 6: Review)

As a last step, review the negotiation to make sure that is setup up properly. In Review step, navigate through all the links from Table of Contents and review information in the system.

Additionally, generate the tender document in PDF to review how it will look for suppliers. Go to “***Actions***” >> “***View Supplier PDF***” to generate the document.

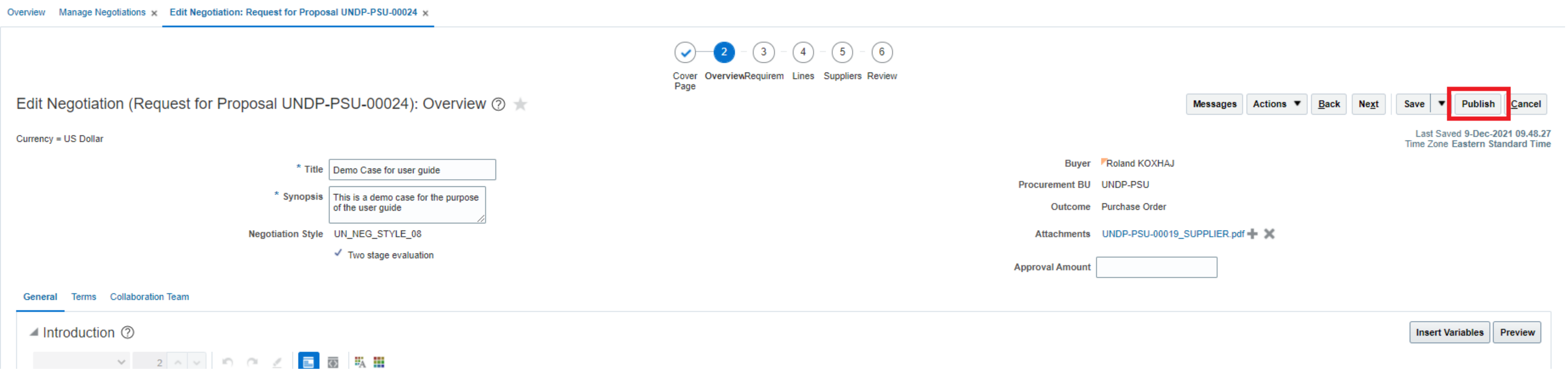




To check if negotiation has the right settings, go to “Action” >> “Validate”.
Red cross means setting need to be fixed before proceeding.
Orange triangle is a warning but system allows to proceed.

2.3.7 Create a Solicitation in the System – Publish

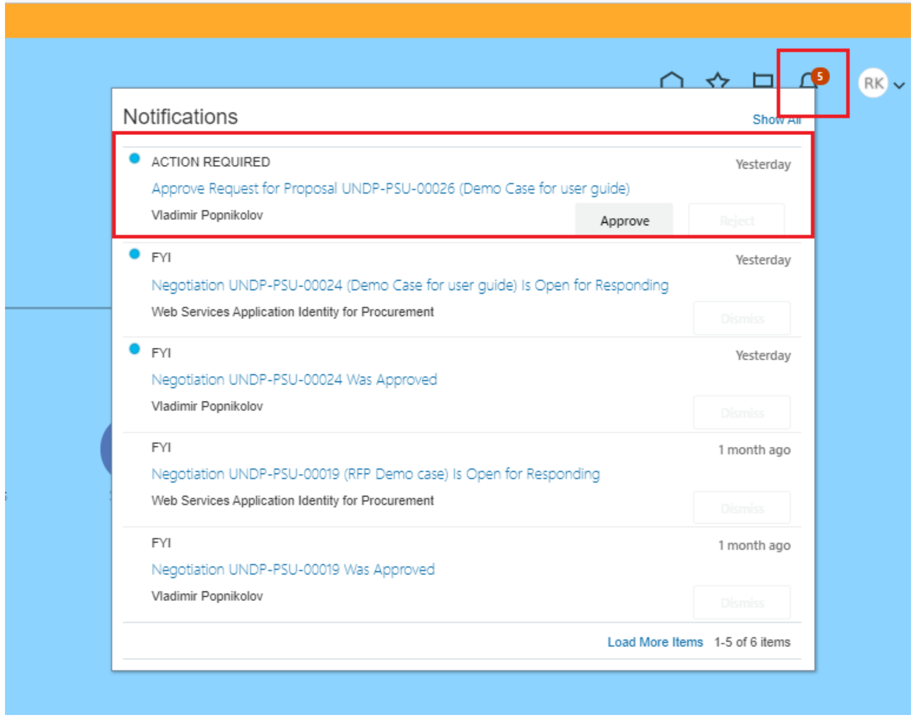
Once negotiation is reviewed, cleared, and ready to publish, click “***Publish***”
This action will initiate an approval process. System will send a notification to all approvers set for the BU and any approver can approve.
Negotiation is not public or visible to suppliers until it has been approved.

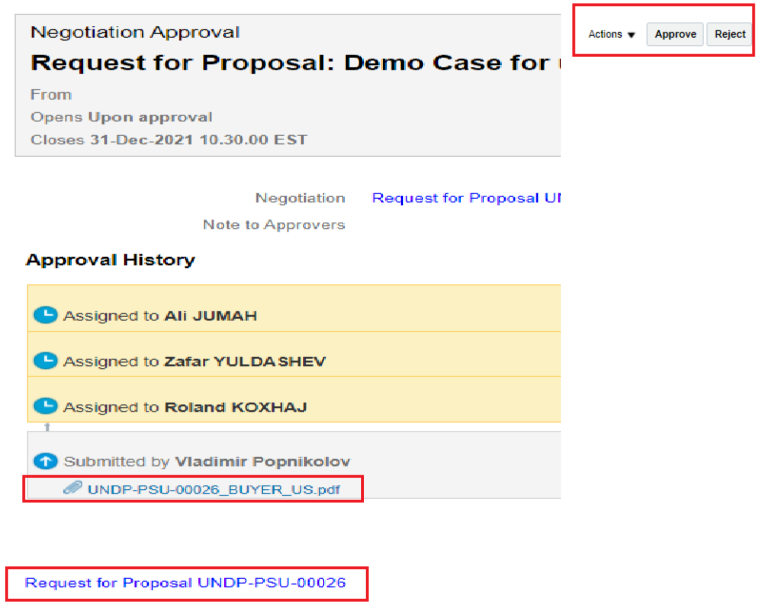


To check if negotiation has the right settings, go to “***Action***” >> “***Validate***”.
Red cross means setting need to be fixed before proceeding.
Orange triangle is a warning, but system allows to proceed.

2.4 Approve a Solicitation in the System

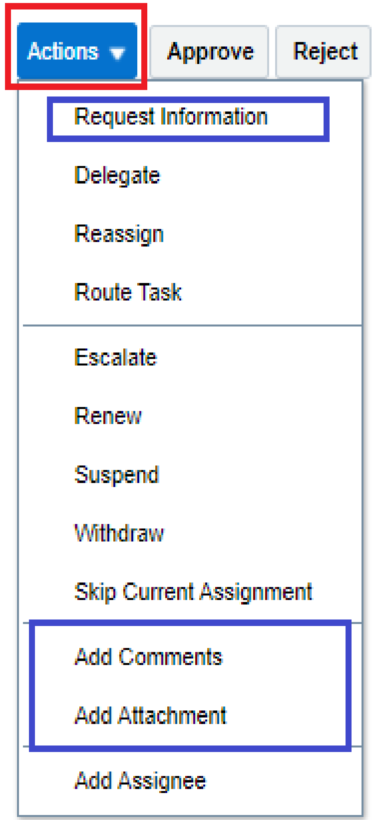
Once negotiation is reviewed, cleared, and ready to publish, click “Publish”
This action will initiate an approval process. System will send a notification to all approvers set for the BU and any approver can approve.
Negotiation is not public or visible to suppliers until it has been approved.





To check if negotiation has the right settings, go to “Action” >> “Validate”.
Red cross means setting need to be fixed before proceeding.
Orange triangle is a warning but system allows to proceed.

2.4 Approve a Solicitation in the System – continued



Approver has other options and actions to take in addition to approver or reject:

- Request Information: To request additional information from procurement officer who submitted the case.
- Add Comments: To add a comment before approving or rejecting the case.
- Add attachment: To add an attachment as part of tender documents directly to the case.

QUANTUM

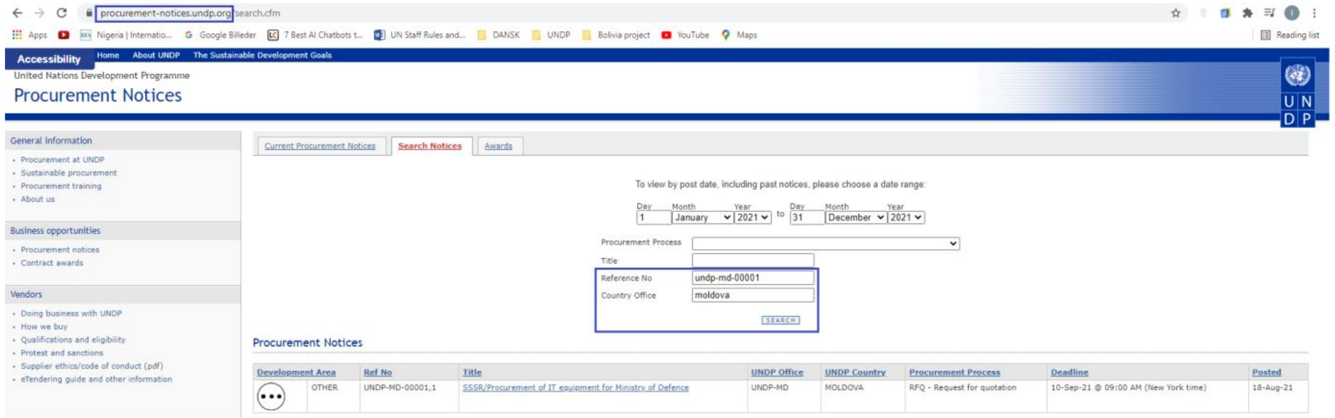
2.5 Automatic creation of a procurement notice on the UNDP Procurement website

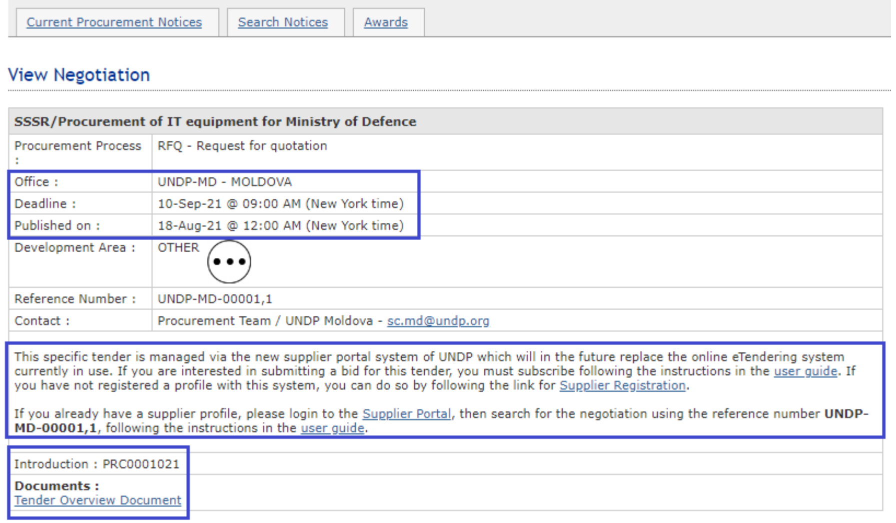
Once a public negotiation is approved, a procurement notice will be automatically created on the UNDP Procurement Notices website. This process takes up to 60 minutes. Go the procurement notices website as an external party (use the URL https://procurement-notices.undp.org/) after **1 hour from the negotiation approval** and identify the procurement notice created for the approved negotiation.

To search and identify the procurement notice, click on the *Search Notices* tab. Select the date range, enter the negotiation ID in the filed *Reference No.* and click on *Search.*

To filter all the procurement notices created from negotiations in Quantum by your Country Office, enter just the first 7 characters contained in all negotiations created in your BU (e.g. UNDP-MD) or enter the country name in the field *Country* and click *Search.*.

IMPORTANT: If the procurement notice is not created or is missing the tender document(s), create an incident on the UNAll platform.

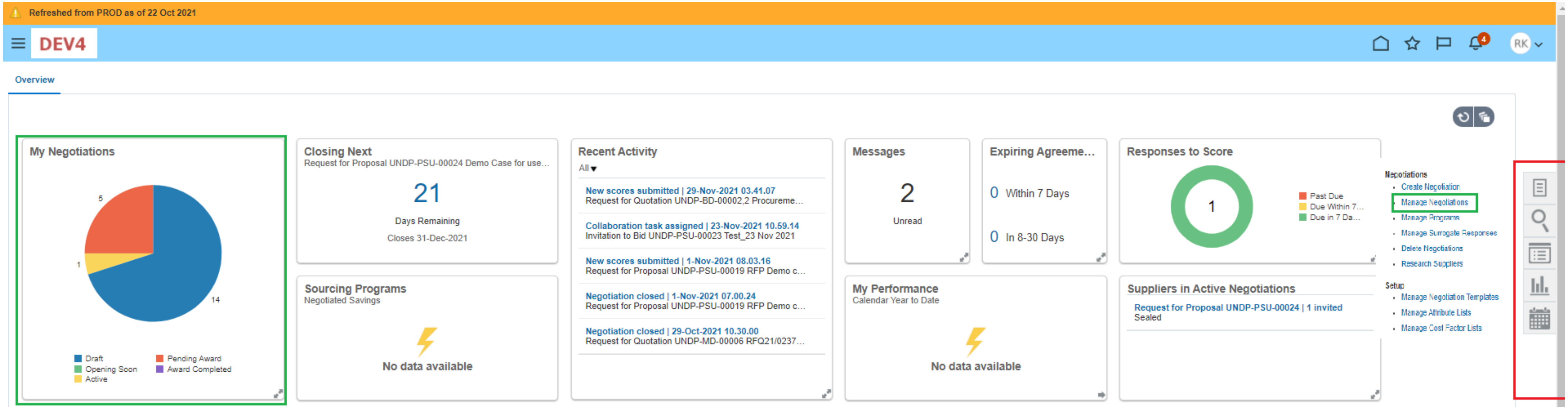




2.6.1 Manage ongoing solicitations – Overview

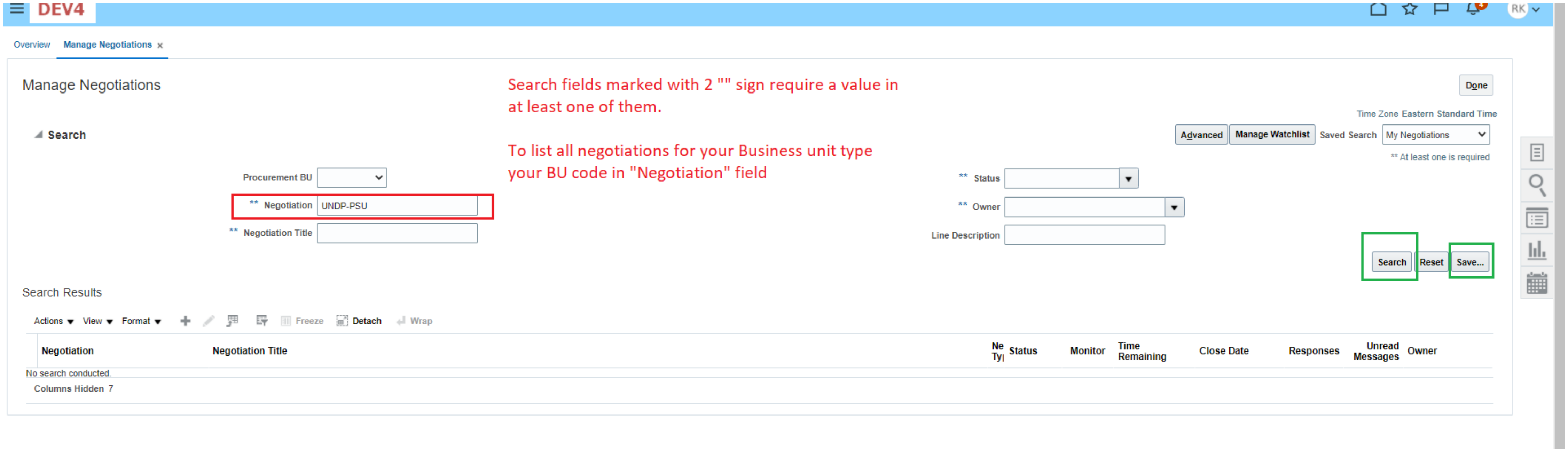
Navigate Home >> Procurement >> Negotiations to go to main overview page for negotiations.

This page contains several info lets each showing overview of various information.
"***My Negotiations***" info let includes negotiations created by yourself. To view all negotiations to which you have access, normally the ones within your business unit, Select "Tasks" icon on the right pane and click "Manage Negotiations"



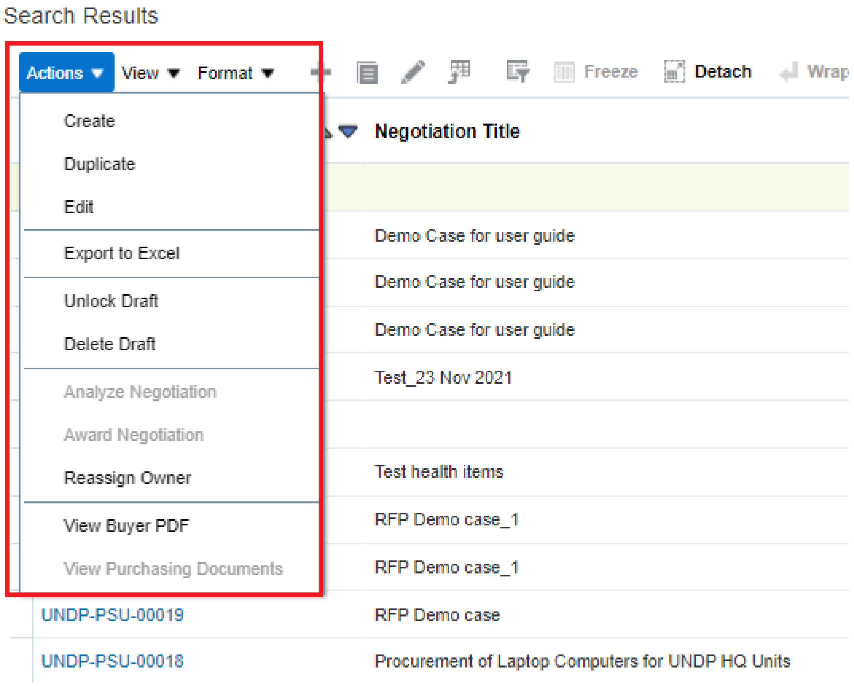
2.6.1 Manage ongoing solicitations - Overview

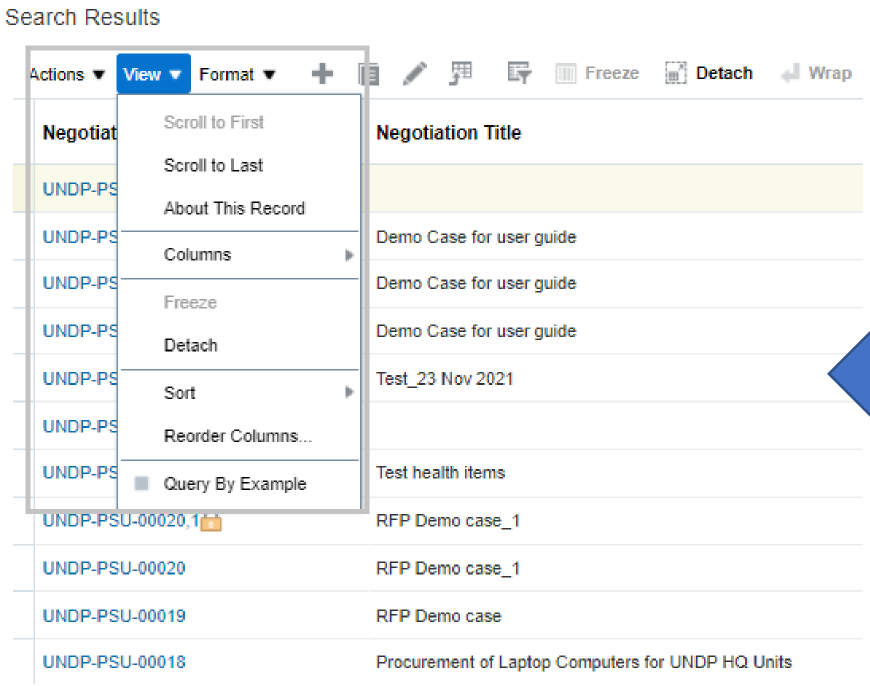
- You can use different search criteria, including negotiation ID. Using BU code in negotiation ID will list all negotiations for that BU. Including the full ID will select the specific negotiation.
- You can create customized searches and make them as the default search using the “Save” function.
- Click search to display the search results.



2.6.1 Manage ongoing solicitations - Overview

Once negotiation is selected, you can take several actions depending on the negotiation status. Alternatively, you can click on negotiation ID hyperlink to open it and take further actions.

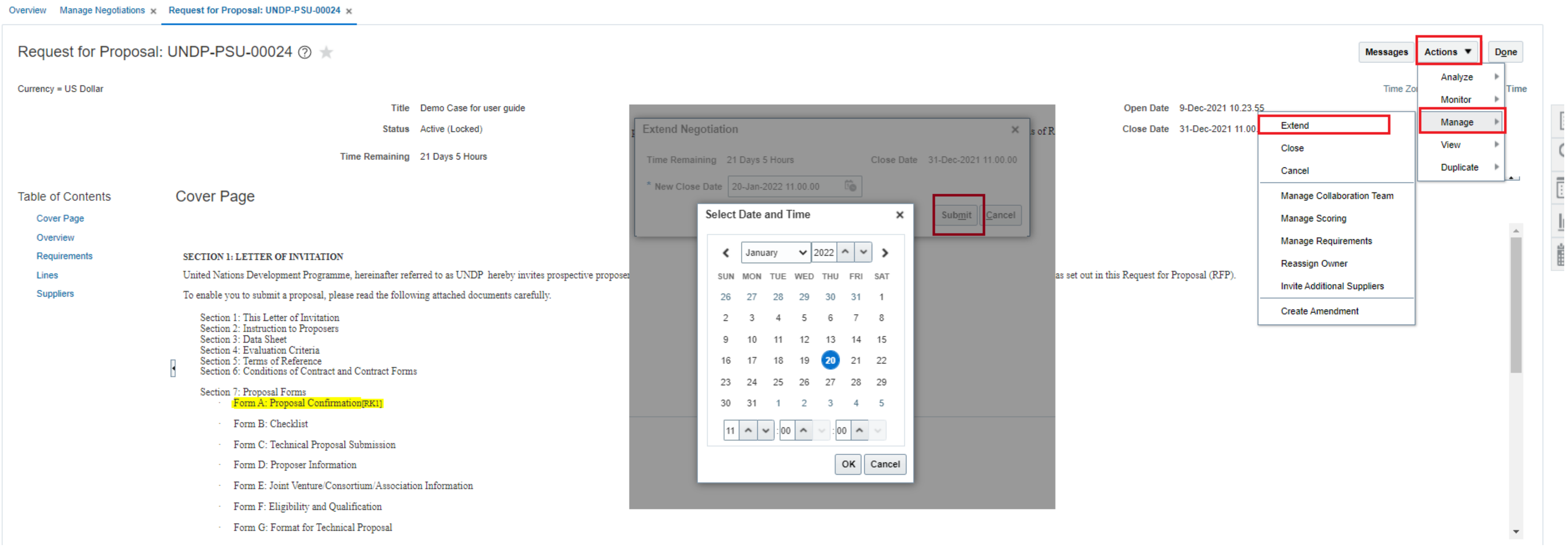




- Create: Creates a new negotiation
- Duplicate: Create a new negotiation by copying from the selected one.
- Edit: Edits selected negotiation
- Export to Excel: Exports all search results into an excel table.
- Unlock draft: Allows user to continue working on a previously saved negotiation.
- Delete draft: deletes a negotiation that is in draft mode.
- Reassign owner: Assigns the case to a different procurement officer.
- View buyer PDF: Opens internal Tender document.

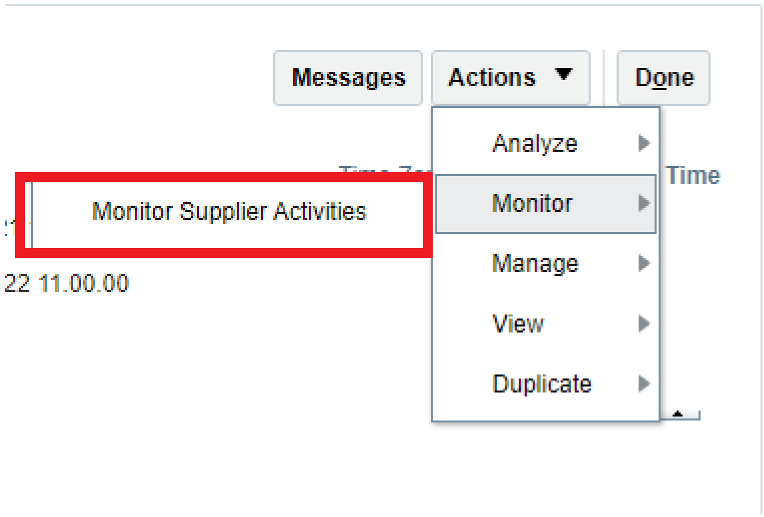
2.6.2 Manage ongoing solicitations – Extend the deadline

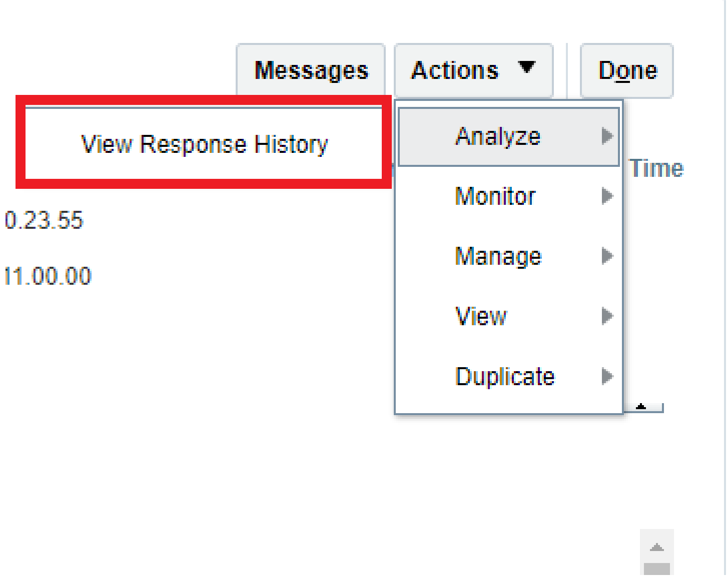
To extend the tender deadline go to “***Actions***” > ***“Manage”*** > ***Extend*** and select the new date and time and click “**Submit**”. The new deadline will be reflected immediately in the portal and in the integrated procurement notices website. No approval is required by the system for deadline extension through this navigation, however, Procurement office must have a clearance and agreement to extend deadline with supervisor and project using CMS system in UNall.



2.6.3 Manage ongoing solicitations – Monitor suppliers' activity

It is very important to monitor regularly suppliers´ activity during solicitation process so that appropriate actions are taken in due time. For example, if there is low interest or participation, it may be necessary to research and notify more suppliers, extend deadline, etc.





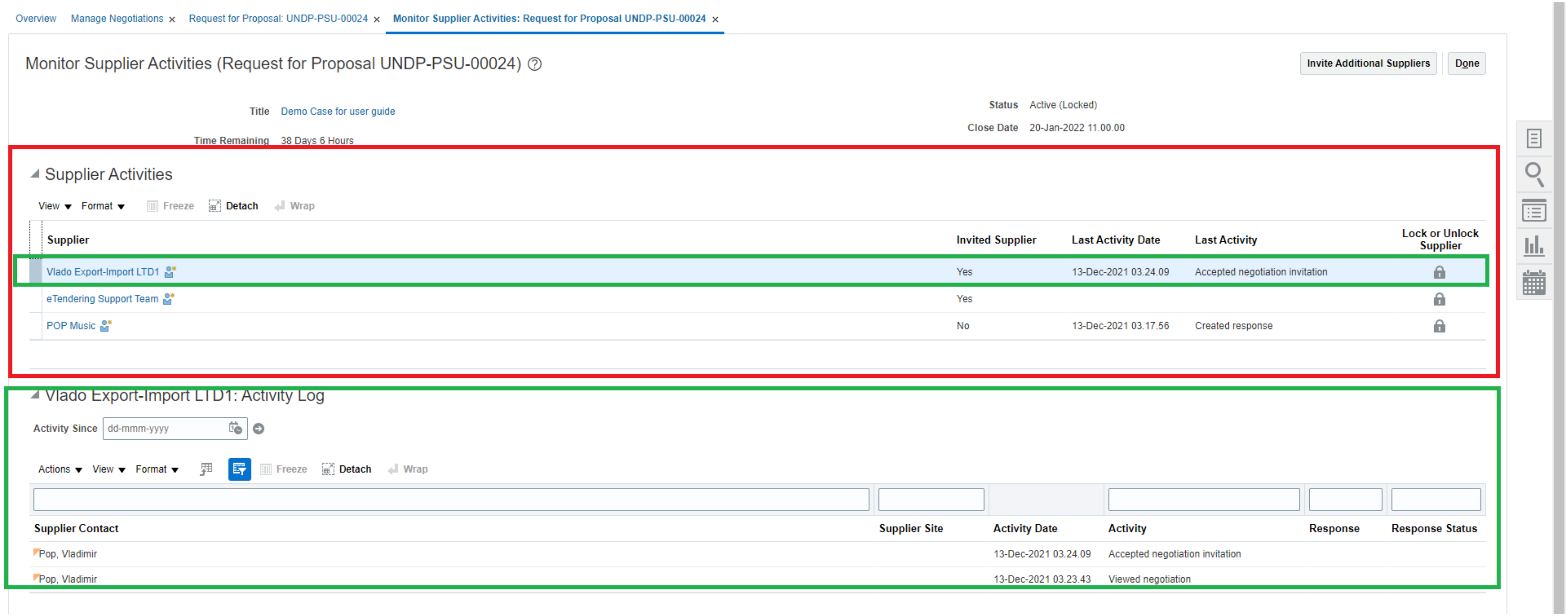
To view if any supplier has subscribed by creating a draft response, or have accepted invitation when invited directly, go to Actions > Monitor > Monitor supplier activities.

To see how many responses have been submitted in the system go to ***Actions*** > ***Analyze*** > ***View Response History.***

2.6.3 Manage ongoing solicitations – Monitor suppliers´ activity

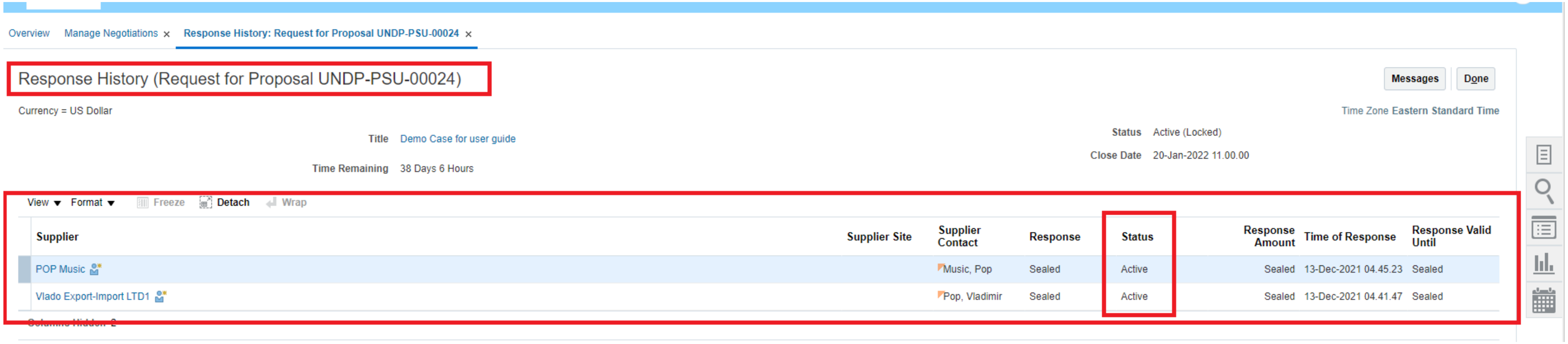
When viewing suppliers’ activity system will list all suppliers that have either been invited directly to negotiation, have submitted a response, or have created a draft response.

After selecting a supplier in the supplier activity box, system will list all activities conducted by that supplier, for example when they view negotiation, download tender document, create a draft or submit a response, etc.



2.6.3 Manage ongoing solicitations – Monitor suppliers´ activity

- When viewing response history system lists all suppliers who have submitted a bid response. Pay attention to response status for any status in disqualified or withdrawn as you may have to take actions for those case. See chapter on creating amendment for more information.
- To view a particular supplier information, click on supplier link to open their profile in the system.


Overview | Manage Negotiations × | Response History: Request for Proposal UNDP-PSU-00024 ×

Response History (Request for Proposal UNDP-PSU-00024)

Messages | Done

Currency = US Dollar

Time Zone Eastern Standard Time

Title: Demo Case for user guide

Time Remaining: 38 Days 6 Hours

Status: Active (Locked)

Close Date: 20-Jan-2022 11.00.00

View ▾ Format ▾ Freeze Detach Wrap

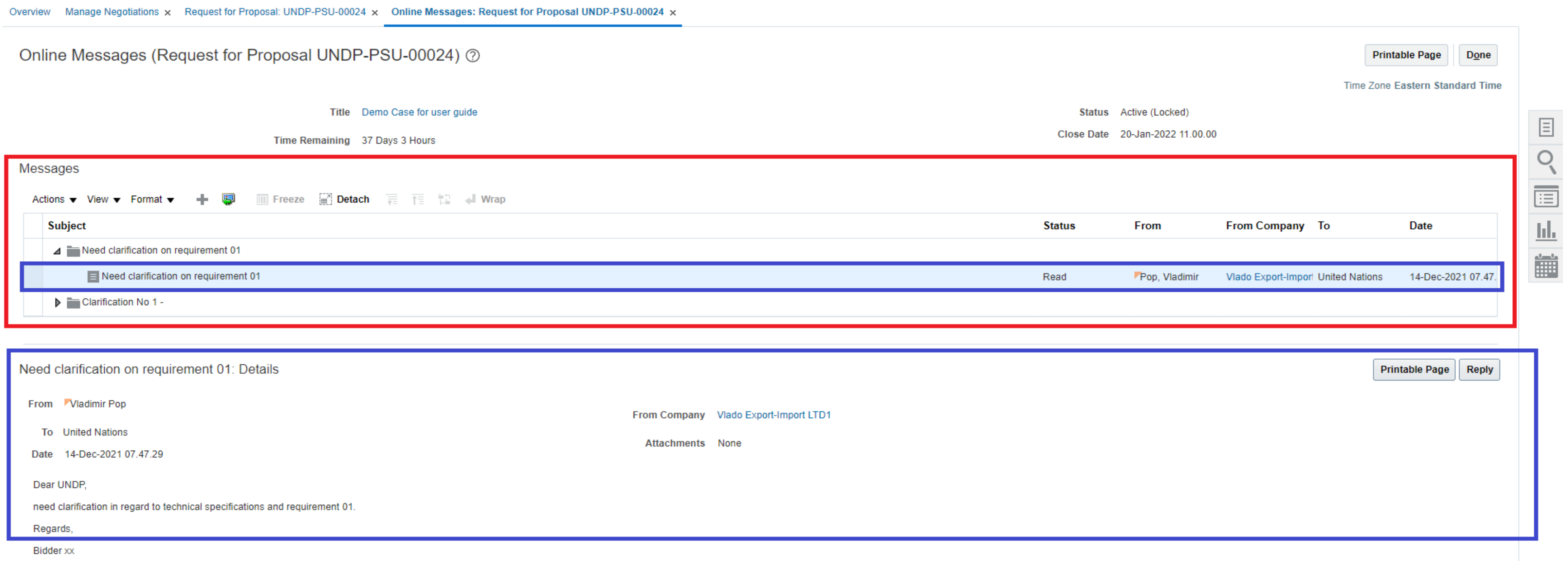
Supplier	Supplier Site	Supplier Contact	Response	Status	Response Amount	Time of Response	Response Valid Until
POP Music		Music, Pop	Sealed	Active	Sealed	13-Dec-2021 04.45.23	Sealed
Vlado Export-Import LTD1		Pop, Vladimir	Sealed	Active	Sealed	13-Dec-2021 04.41.47	Sealed

Columns Hidden 2

2.6.4 Manage ongoing solicitations – Clarifications

System has an internal messaging functionality that allows suppliers to write to procurement officer as well as procurement officer to write to suppliers. This feature can be used to receive questions from suppliers as well as to disseminate clarifications and additional information about the tender, for example, minutes of pre-bid meeting. All communications will be stored and archived within the case.

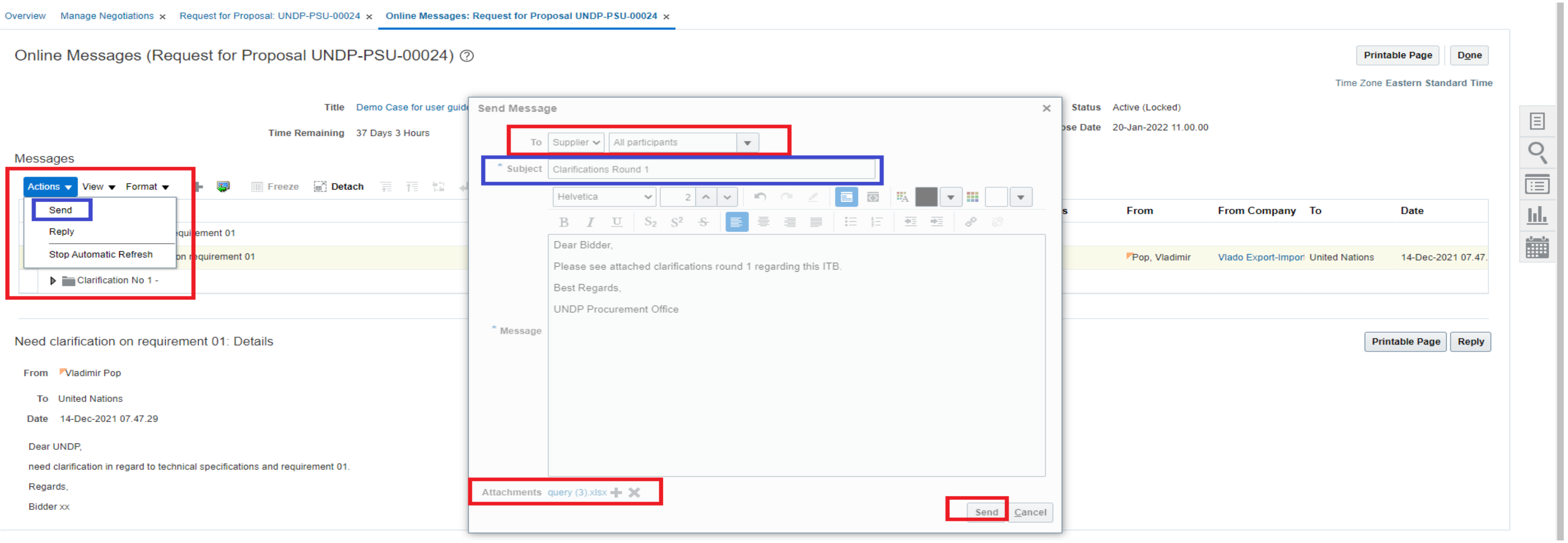
Suppliers are a instructed to use this functionality to write to procurement office. All messages will be accessible in “Messages” box. Once a message is selected, its content will be displayed in the window below.



2.6.4 Manage ongoing solicitations – Clarifications

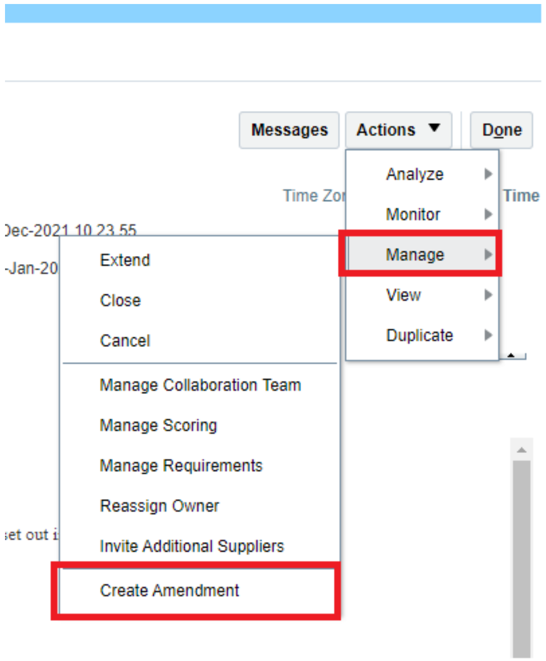
Once all questions and answers are consolidated in one document, procurement officer can share with suppliers by creating a new message. Go to ***Actions*** > ***Send*** and then select "***Supplier***" and "***All participants***". Write clearly the subject, e.g. Clarifications Round 1, message and attach the document with consolidated questions and answers or minutes of pre-bid meeting.

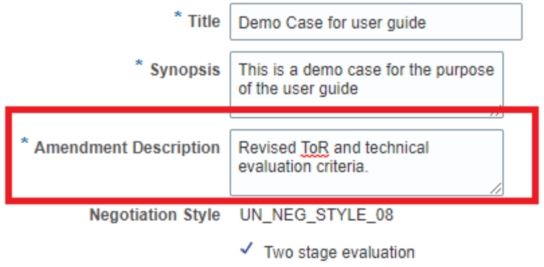
Notification will be sent to all subscribed suppliers, and they can access full content in the portal. Suppliers that subscribe to the tender after a message is sent will still be able to see the message in the portal directly.



2.6.5 Manage ongoing solicitations – Create an Amendment

- To create an amendment go to ***Manage*** >> ***Create Amendment***. Write a clear description of what the amendment is about so it is clearly understood by suppliers. Amendment keep same Negotiation ID and add an amendment sequential number in the end.
- When an amendment is created, and bid response that was submitted by suppliers prior to the amendment will be withdrawn automatically by the system and it is required that suppliers re-submit their bid. Create amendment only when necessary.
- Amended version of a negotiation has to be approved in order to replace the previous negotiation version.





For due diligence, procurement officer must monitor supplier participation before and after the amendment to make sure that suppliers who have their bid response withdrawn by the system take the necessary actions to re-submit their response.

3.0 Evaluation of Bids

This section covers instructions on how to access the bids received, conduct Public Bid Opening when it is required, how to download and share the bid documents, and how to sue the Evaluation Process Management function.

3.1 Review List Of Received Offers

*Once the deadline of the tender has passed, buyer can view list of offers received (only list of companies) based on which a decision can be made whether to proceed further with the process. It is important such decision is made before offers are opened. Open the negotiation and go to "**Actions**" >> "**Analyze**" >> "**View Response History**". Alternatively, you can open the same page by clicking in the hyperlinked number of responses from workbench.*

Response History (Invitation to Bid UNDP-PSU-00035)

Messages | Done

Currency = US Dollar

Time Zone Eastern Standard Time

Title USer Guide demo case

Status Closed (Locked)

Close Date 22-Jan-2022 07.58.44

View ▾ Format ▾ Freeze Detach Wrap

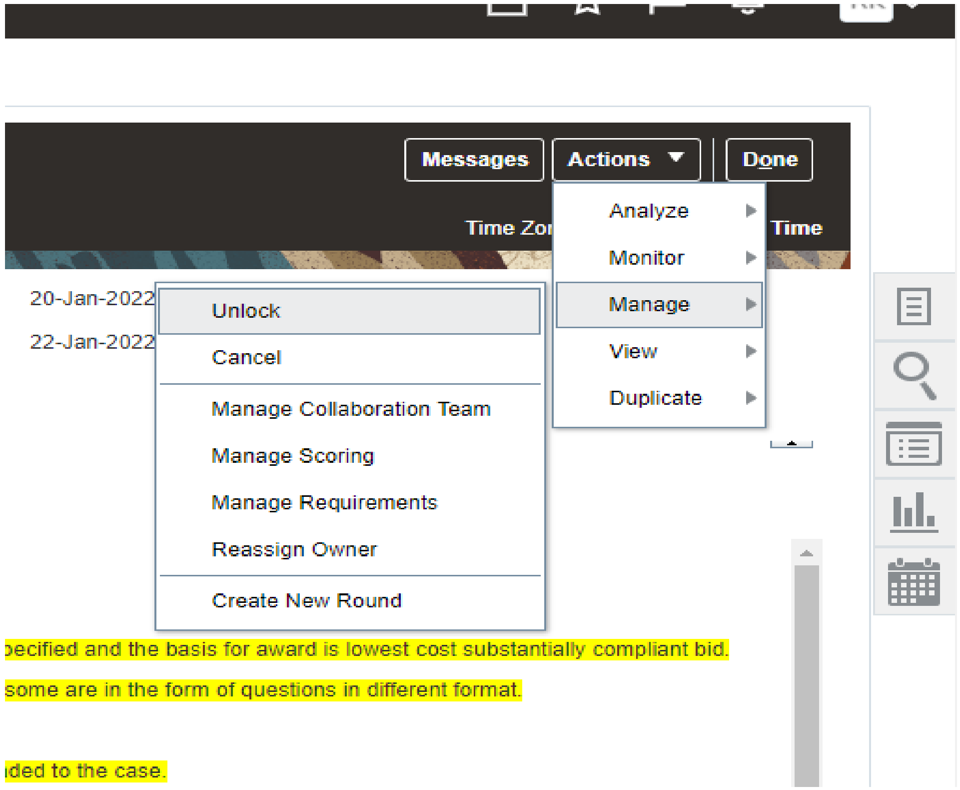
Supplier	Supplier Site	Supplier Contact	Response	Status	Response Amount	Overall Rank (Amount Only)	Composite Score	Overall Rank (Composite)	Time of Response	Response Valid Until
POP Music		Music, POP	Sealed	Active	Sealed	Sealed	Sealed	Sealed	20-Jan-2022 09.18.34	Sealed
Vlado Export-Import		Pop, Vlado	Sealed	Active	Sealed	Sealed	Sealed	Sealed	20-Jan-2022 08.55.53	Sealed
eTendering Support Team		Support Team, ...	Sealed	Active	Sealed	Sealed	Sealed	Sealed	20-Jan-2022 09.34.17	Sealed

Columns Hidden 2

Review composition of the evaluation team that was agreed at strategy alignment phase in case there is a need to revise, for example due to unavailability of one of the members, or conflict of interested based on the company names who have submitted an offer. If evaluation team needs to be revised, record it in Unall once it is cleared with management.

3.2 Open Offers

- *Once evaluation team is finalized and agreed to proceed with evaluation, open offers received.*
- *Go to "**Actions**" >> "**Manage**" >> "**Unlock**".*
- *Once unlocked, buyers and members of evaluation team can view offers received. In RFP cases only technical offer can be viewed at this stage. See more details in RFP evaluation steps.*



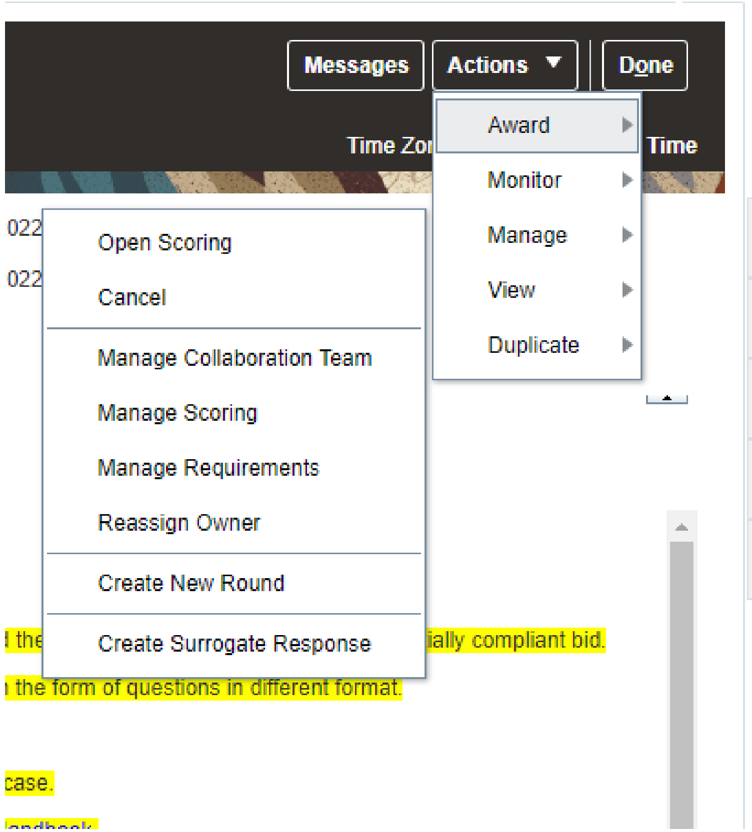
3.3 Finalize Composition and Establish Tasks of The Evaluation Team

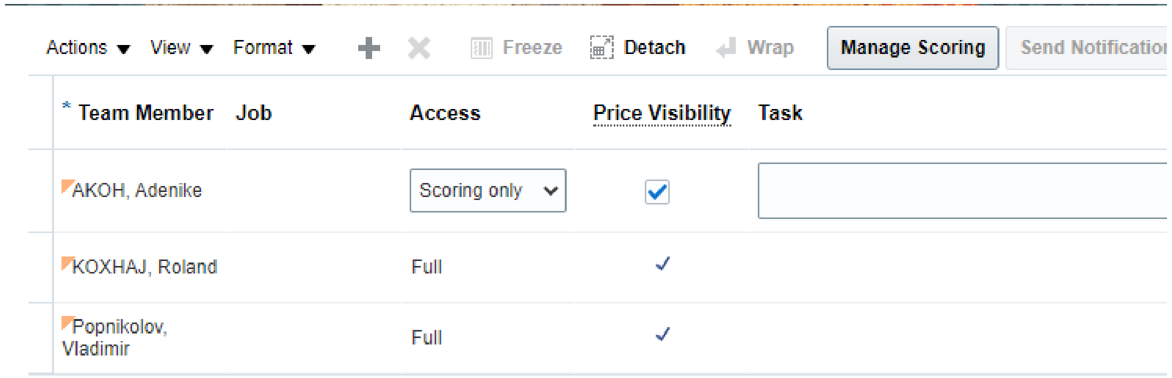
Review composition of the evaluation team that was agreed at strategy alignment phase in case there is a need to revise, for example due to unavailability of one of the members, or conflict of interested based on the company names who have submitted an offer. If evaluation team needs to be revised, record it in Unall once it is cleared with management.

*It is still possible at this stage to revise composition of the evaluation team members (selected on the solicitation in Quantum) to reflect any changes made before start of evaluation. To do so go to "**Actions**" >> "**Manage**" >> "**Manage Collaboration Team**".*

*Then add or remove members as applicable. To remove, select the member then go to "**Actions**" >> "**Remove**".*

*To add go to "**Actions**" >> "**Add**" and find the new member.*





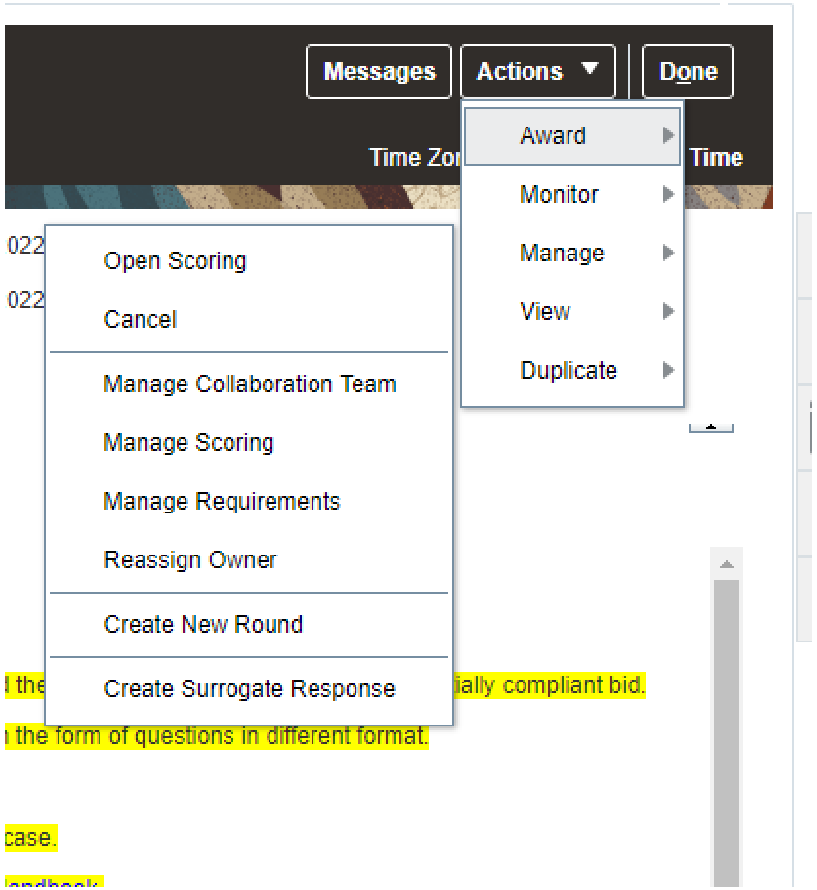
3.3 Finalize Composition and Establish Tasks of The Evaluation Team (continued)

System allows to assign and distribute evaluation tasks among members of the evaluation team. For example, one person may be assigned to check for completeness of the offers, some other may be assigned to assess qualification criteria, or commercial aspects, etc. Basically, each of the requirement's sections that were established when tender was created can be assigned to different persons/groups.

Alternatively, all members can be put in one group and tasked to assess all sections together.

*Go to "**Actions**" >> "**Manage**" >> "**Manage Scoring**" to go to next page.*

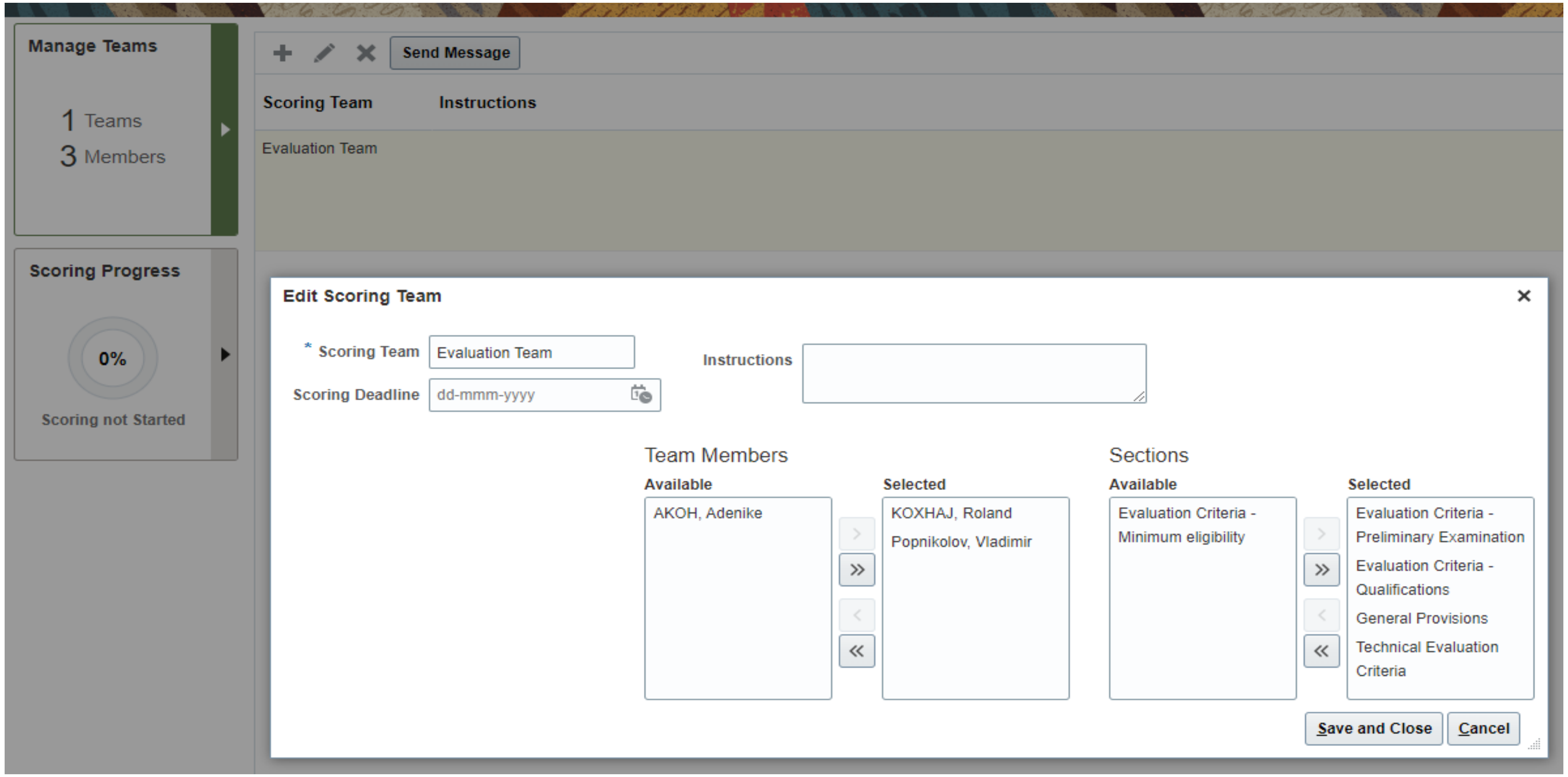
Despite how evaluation tasks are distributed at this stage, all members of evaluation team members are responsible for reviewing and confirming all aspects of evaluation and will be asked to sign-off on the final evaluation reports that will be finalized in Unall.



3.3 Finalize Composition and Establish Tasks of The Evaluation Team (continued)

*To setup a group, click on + sign, type in a name, e.g. Pre-liminary evaluation, select members who part of this group using arrows to move them from "**Available**" to "**Selected**" boxes or vice versa and assign what requirements they will be tasked to review and score by moving them into the "**Selected**" box.*

You can write also specific instructions to explain their task and include also a deadline for the task.
You can also write a message from the system using "Send Message" feature.

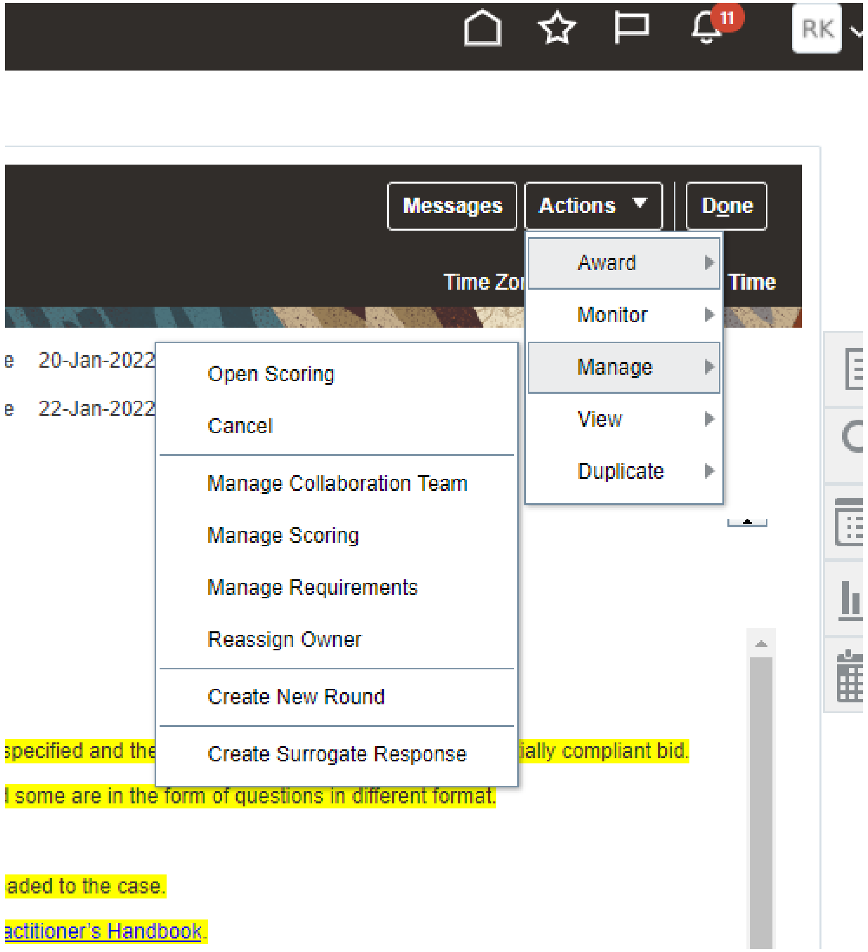


3.4.1 Evaluation process – Open Scoring

*To initiate evaluation process and allow evaluators to score the offers, go to “**Actions**” >> “**Manage**” >> “**Open Scoring**”.*
The evaluation process is composed of two main parts:

Part 1 in Quantum which consists of reviewing and scoring the evaluation criteria established in the solicitation document. This will be transformed into evaluation tables by the system.

Part 2 in Unall which consists of final narrative evaluation report and sign-off by all evaluation team members.



Very Important Note:

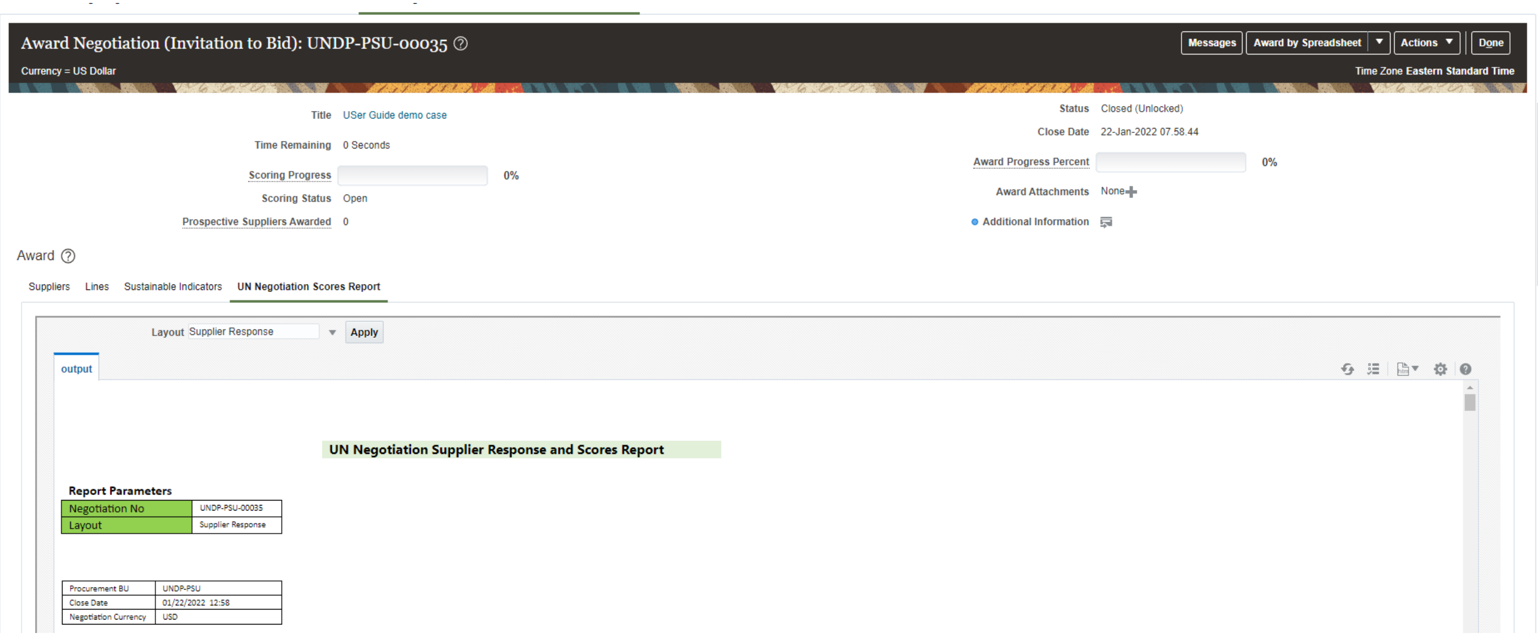
Once this action is taken, it will not be possible anymore to change how the requirements are assigned to the various evaluation groups that was done in previous steps. Also it will not be able to add new internal requirements. Make sure that all is setup correctly before opening scoring.

3.4.2 Overview of offers received – Generate Report Summary of all received offers

Any member of the evaluation team can review offers and attachments and generate the reports available. It is up to the evaluation chairperson to decide how this is done for each case, e.g. whether on person generates reports and downloads attachments, or each member does so as needed during the evaluation process.

To generate an excel or PDF report with a summary of all offers received and responses provided, go to "***Actions***" >> "***Award***", then select "***UN Negotiations Scores Report***" tab, select "***Supplier Response***" and click "***Apply***".

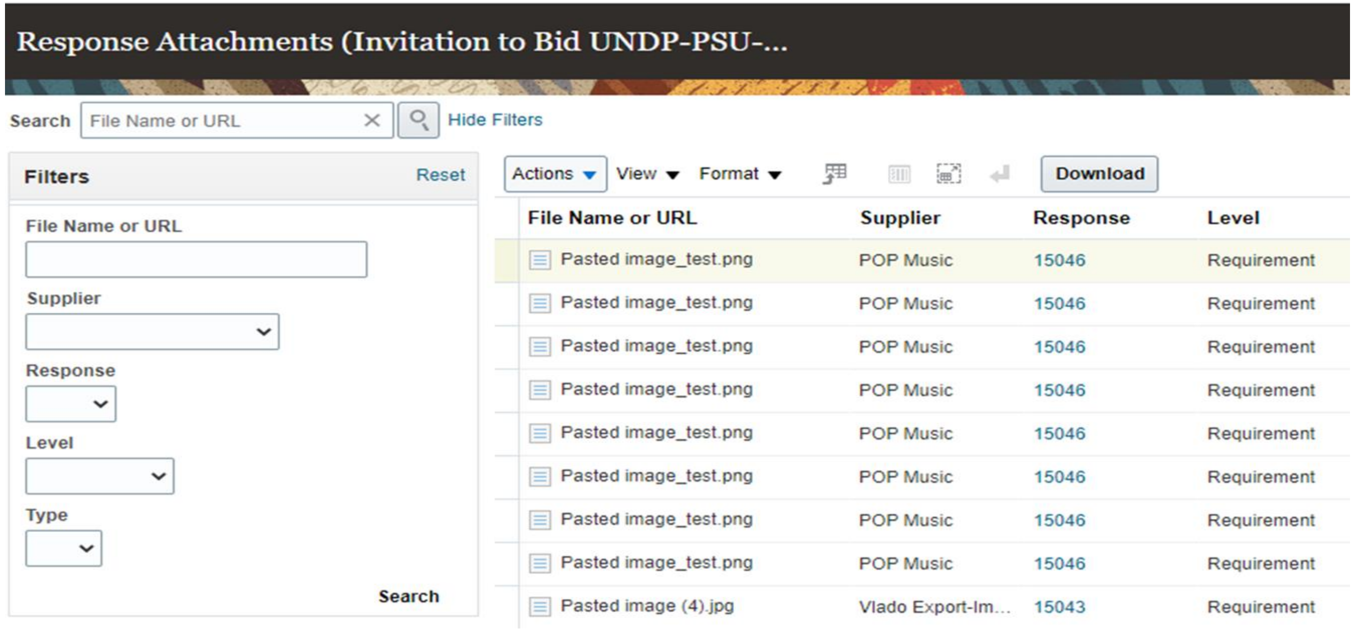
Click on gear sign and select export to download report.

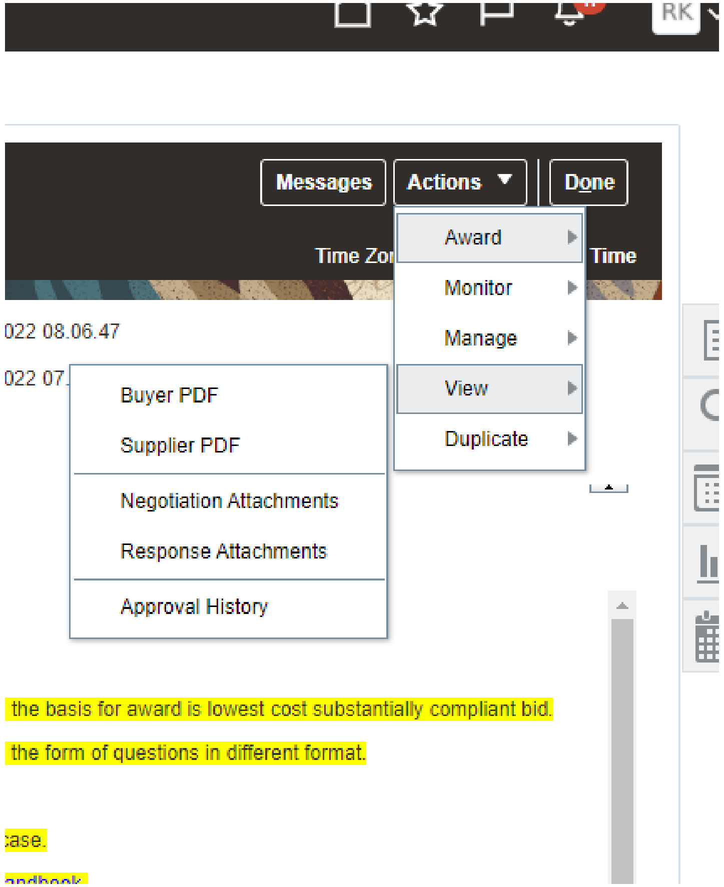


3.4.3 Overview of received offers - View and download bid attachments

To view and download attachments submitted by suppliers, go to "***Actions***" >> ""***View***" >> "***Response Attachments***".
System will list all attachments; you can search by supplier or file name.
Once file is located, click "***Download***".

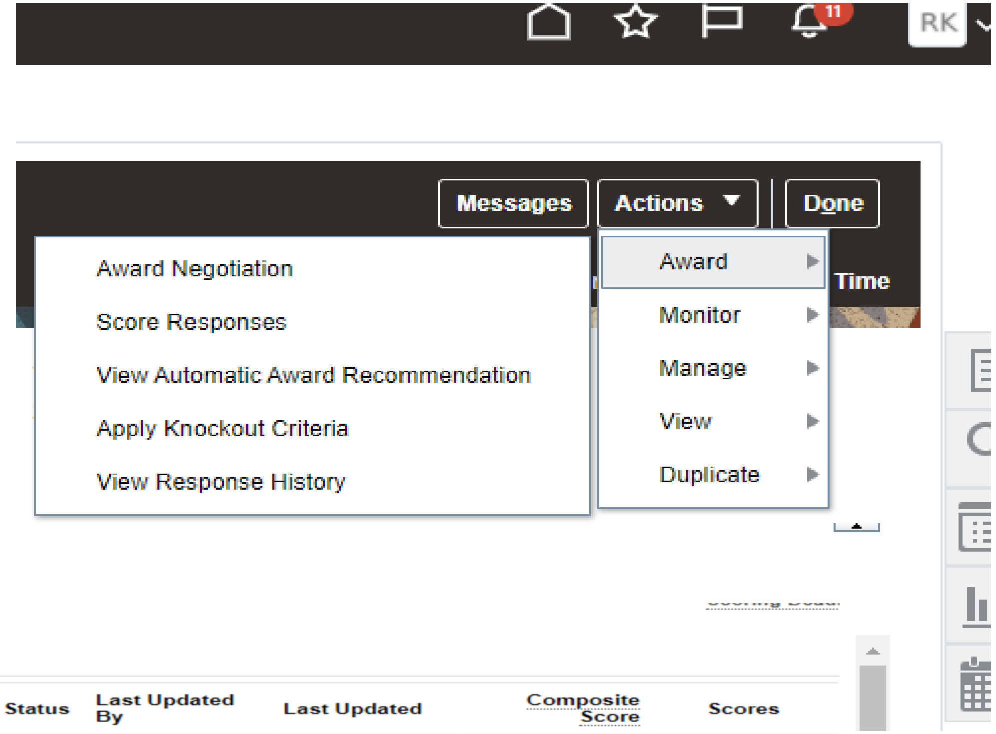
You can also download all files at one go by selecting download all, or some files by selected them and clicking download.

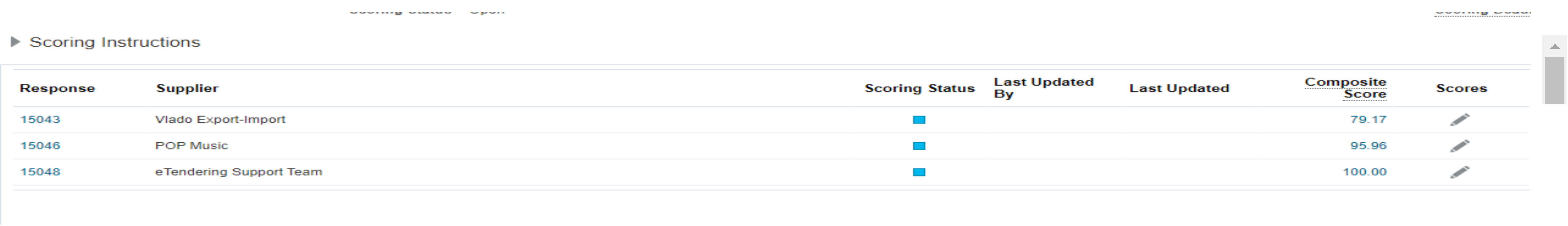




3.4.4 Review and score offers

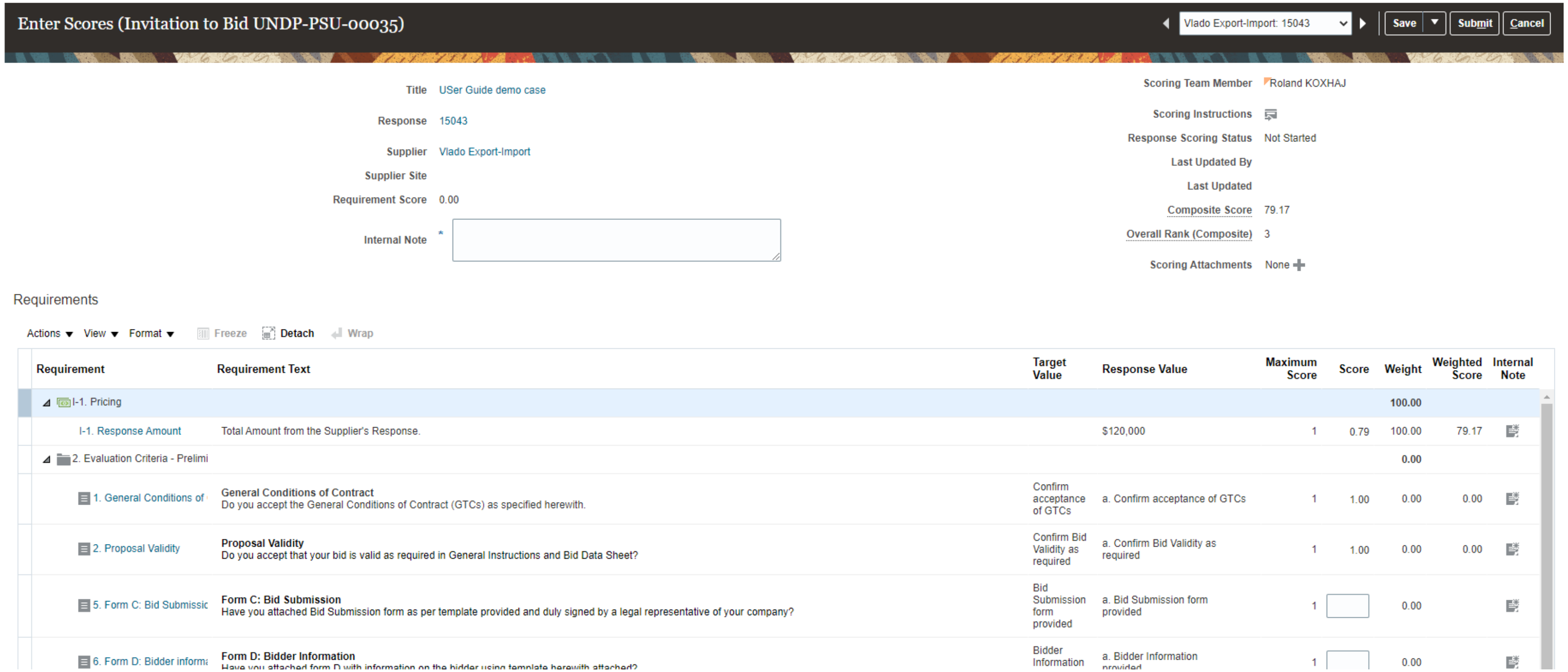
*To start reviewing and scoring offers, go to "**Actions**" >> "**Award**" and select "**Score Responses**" then click on pencil sign to initiate scoring.*





3.4.4 Review and score offers - continued

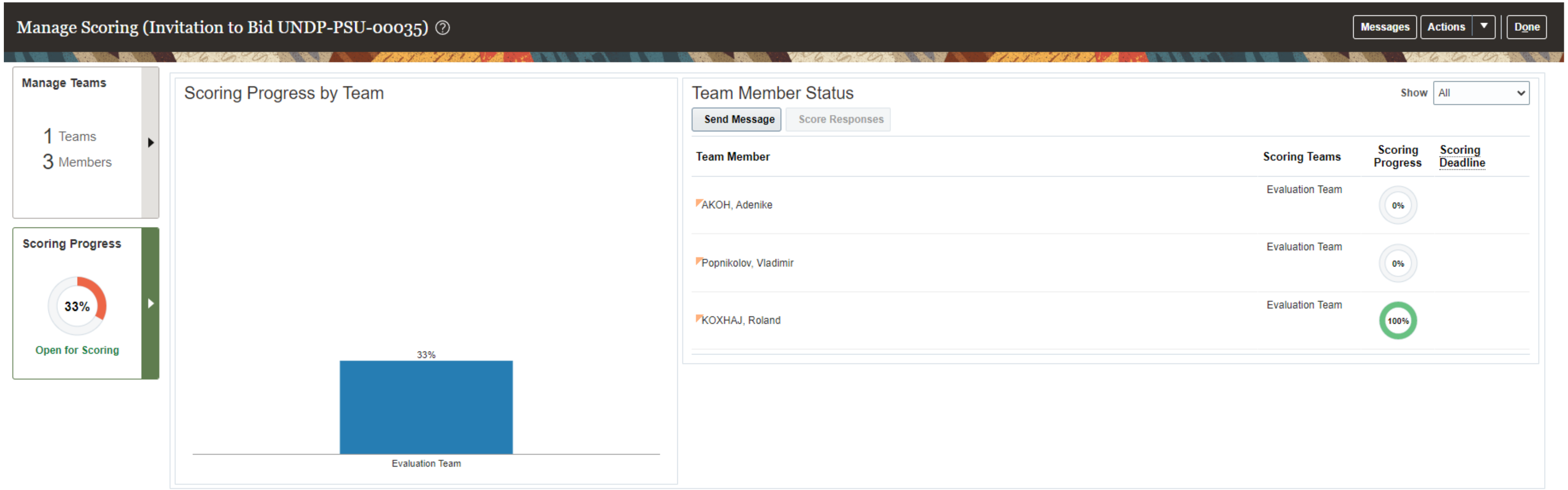
All requirements will be listed, and each evaluator can score those assigned to him/her, following scoring guidelines. For example, marking as 1 or 0 the Pass/Fail criteria, or a numeric sore for technical evaluation criteria for RFPs.
If supplier has uploading attachments as part of response for each criteria, evaluator can download and view it directly from each requirement.
*When all criteria have been reviewed and scored, evaluator writes a general note under "**Internal Note**" box and clicks "**Submit**" to submit scores before starting reviewing next offer.*



It is possible to score response through excel as explained in this section.

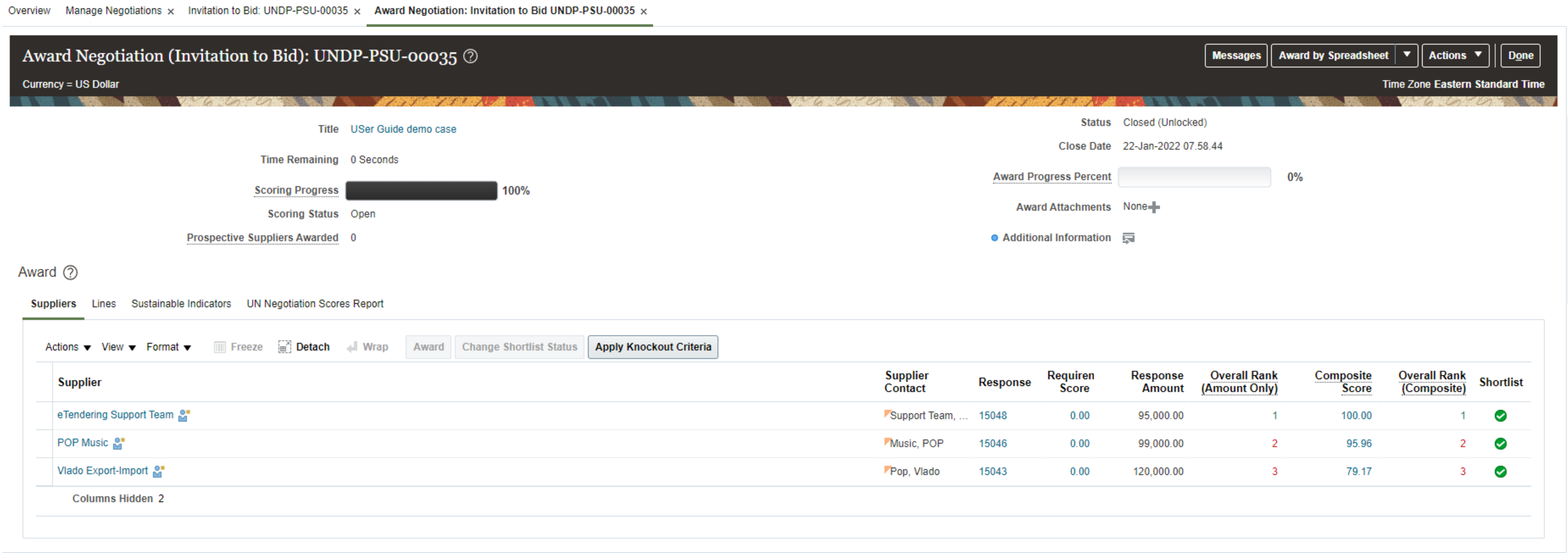
3.5 Review status of evaluation process

*Buyer can review status of the evaluation process to see who has completed scoring by navigating to "**Actions**" >> "**Managing Scoring**" and selecting "**Scoring Progress**" Tab. In the example below system shows that one evaluator has completed the scoring.*
*"**Send Message**" feature can be used to send an email reminder to evaluation team.*



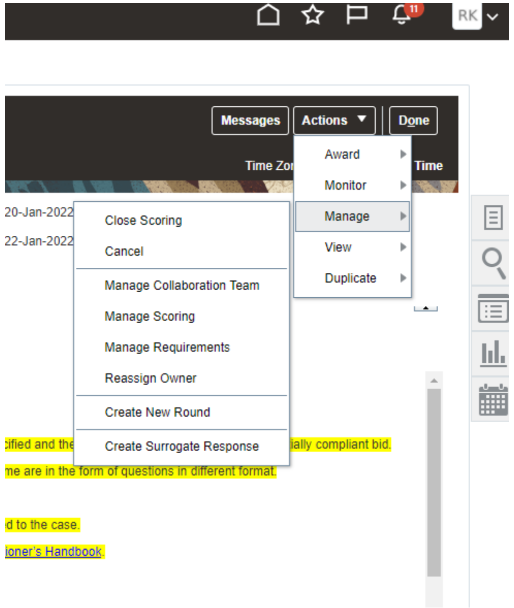
3.5 Review status of evaluation process (continued)

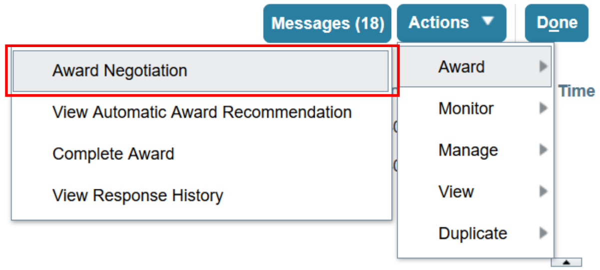
*Buyer can review also status and ranking of offers based on scoring provided by navigating to "**Actions**" > "**Award**" and select "**Suppliers**" tab.*
*Using "**Apply Knockout Criteria**" buyer can automatically create a shortlist of suppliers who have passed evaluation criteria so far. This works based on knockout scoring established for requirements. System allows buyer to disqualify suppliers manually as well.*

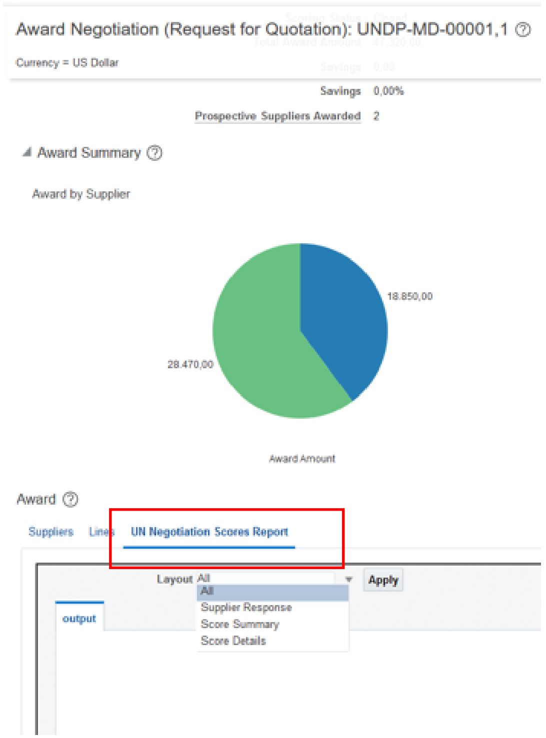


3.6 Close scoring and generate evaluation tables

*Buyer first needs to close scoring process in order to then generate scoring tables. Navigate to “**Actions**” >> “**Manage**” and select “**Close Scoring**”.*
When scoring is closed, evaluators cannot score anymore. However, it is possible to re-open scoring to allow evaluators to submit their score. System will record when who submits the scores in the system.





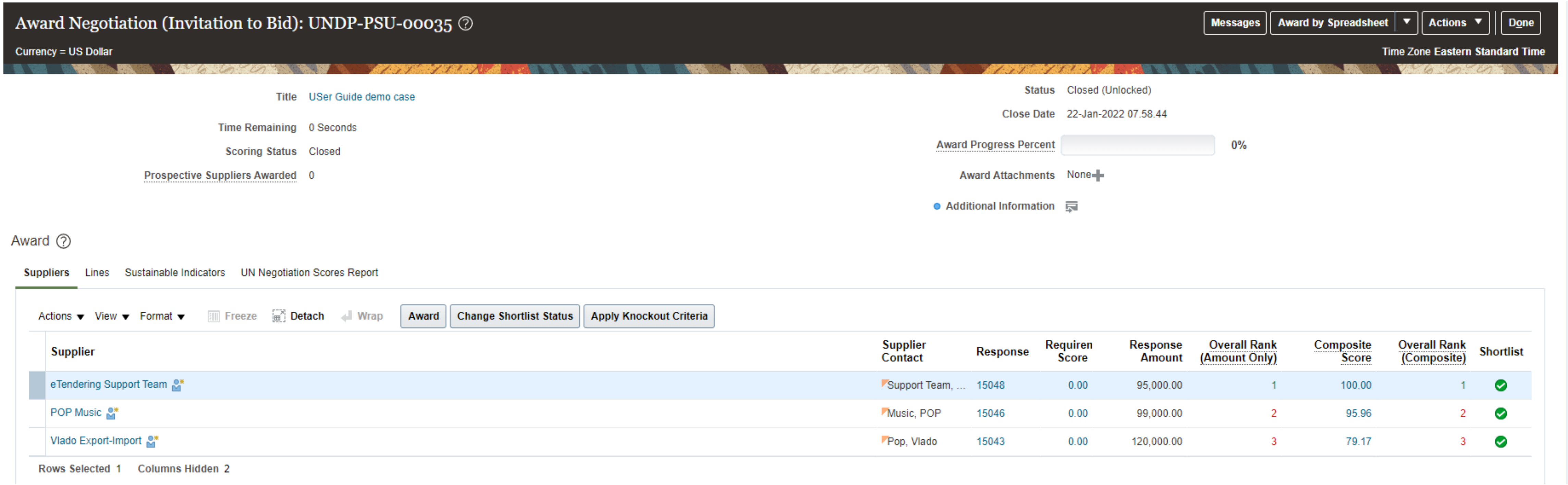


*To generate the report, go to “**UN Negotiations Score Report**” under “**Award Negotiation**” page and select applicable layouts: Score Summary will include average scores whiles Scoring details will include also individual scores by each evaluator.*

Important:
Report will capture only qualified offers. Therefore, buyer must download and save reports before any offer is disqualified first, and then download again after qualifications action.

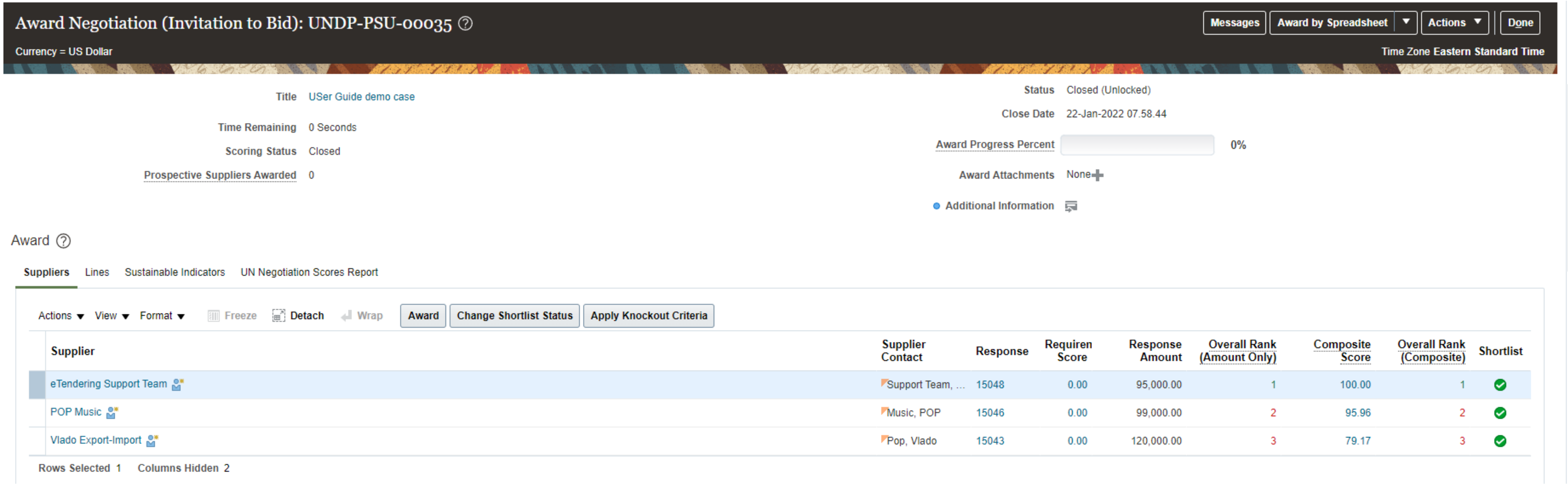
3.7 Select suppliers and quantities to be awarded

*In "Award" page, select the supplier that is being recommend for award and click on the "**Award**" button.*



3.7 Select suppliers and quantities to be awarded (continued)

- *In “**Award**” page, go to “**Suppliers**” tab and select the supplier that is being recommend for award and click on the “**Award**” button.*
- *To split award, select “**Lines**” tab instead and in the subsequent page specify quantities to be awarded to each supplier.*



3.8 Submit Award Recommendation For Further Approval

*In "**Award**" page, go to "**Suppliers**" tab and select the supplier that is being recommend for award and click on the "Award" button. Navigate to "**Actions**" >> "**Award**" >> "**Submit for approval**"*

The next steps will be conducted in UNall and will depend on the review and approval processes required for each case. Below are some of the key steps followed in Unall:

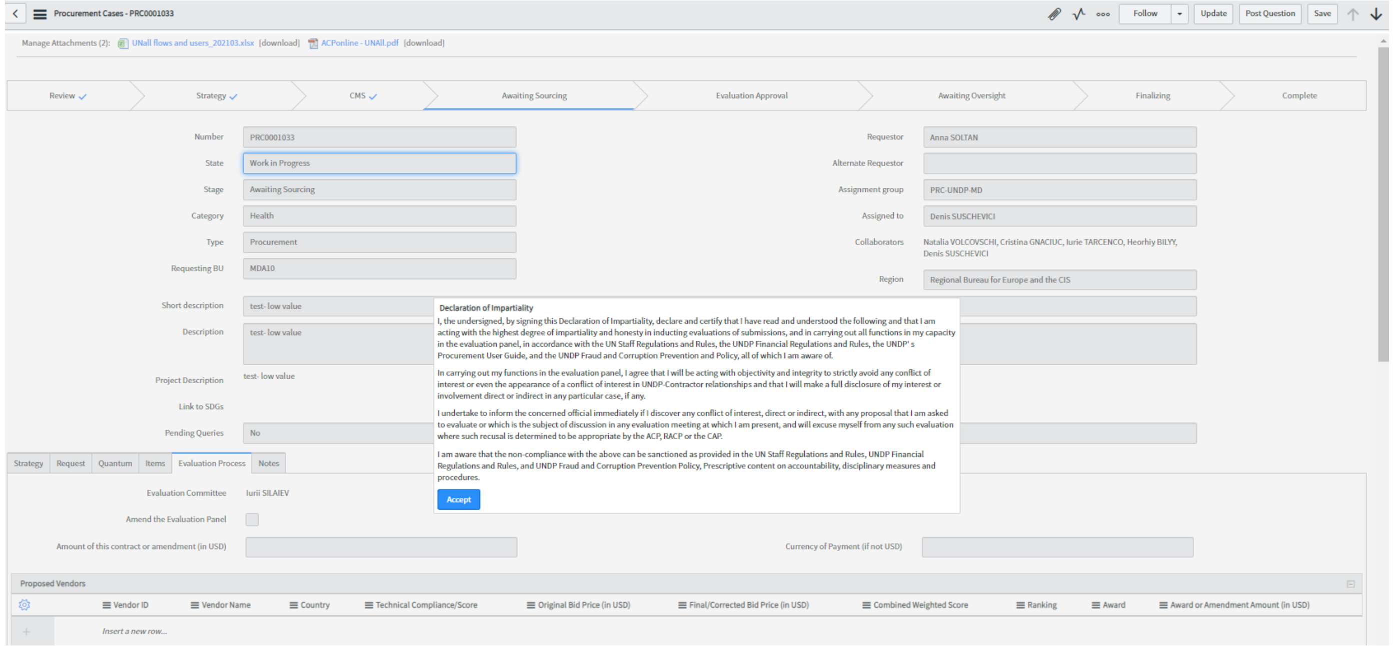
1. *Completing narrative evaluation report – for all cases.*
2. *Sign off of the evaluation report by evaluation team members – for all cases.*
3. *Review and approve evaluation report by office manager – for all cases.*
4. *Oversight review and approval – if required.*

Once award recommendation is approved in step 3 or step 4 above as applicable, notification is sent to Quantum and system will allow buyer to proceed with contracting step.

3.9 Completing narrative evaluation report in UNall

UNall contains an evaluation form where evaluation team can record key information about evaluation process. If an oversight will be required, the box *Oversight Required* should be checked and the based on the award amount, the appropriate oversight body should be selected. *Once* the evaluation is finalized, the buyer managing the case should check the box *Evaluation Complete*. Then, each member can sign-off the evaluation by clicking the button *Endorse Evaluation.*

Click on "***Yes***".

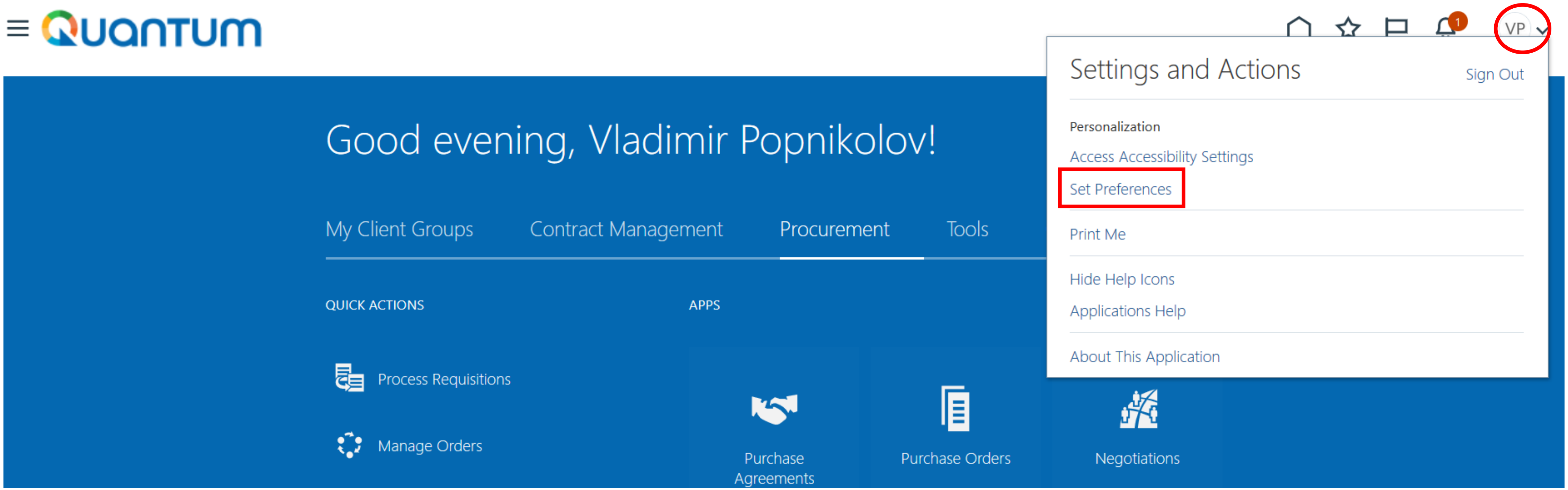


4.0 Annexes

Annex 1: Setting User Preferences

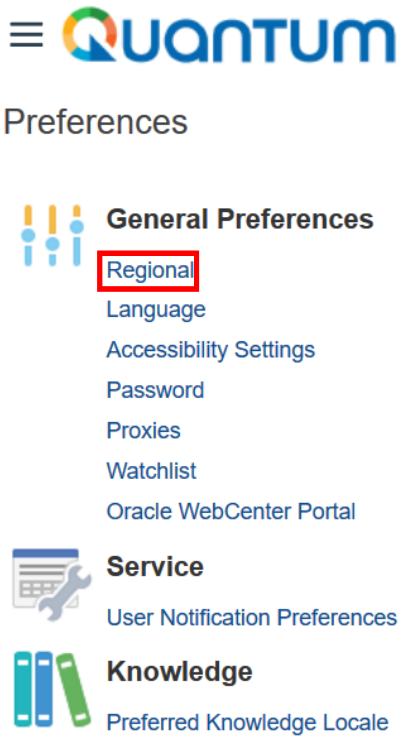
Setting User Preferences – Set the Regional preferences

Quantum provides an option for each user to set her/his own preferences. Click on *Settings and Actions Menu* icon and then select *Set Preferences.*



Setting User Preferences – Set the Regional preferences - continued

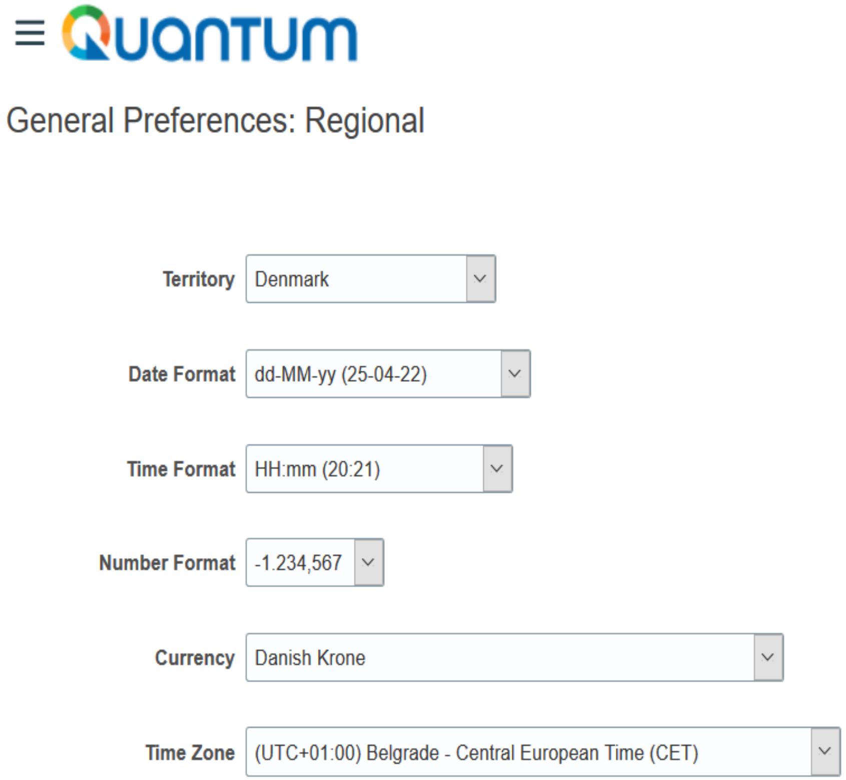
To set your Regional preferences click the option *Regional*. Then you can set several different preferences.



Territory: Select your country.

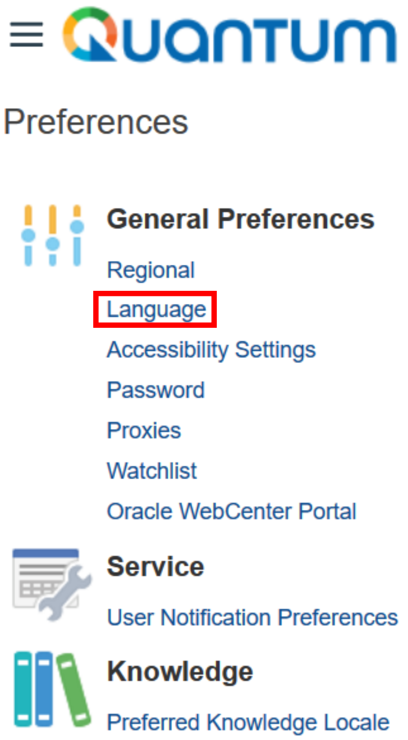
Date and time format: Select the format in which you wish the date/time to be presented.

Time Zone: Select the time zone in which you operate. This will enable you to set the tender deadline to the exact time as per your chosen setting (e.g. your local time).



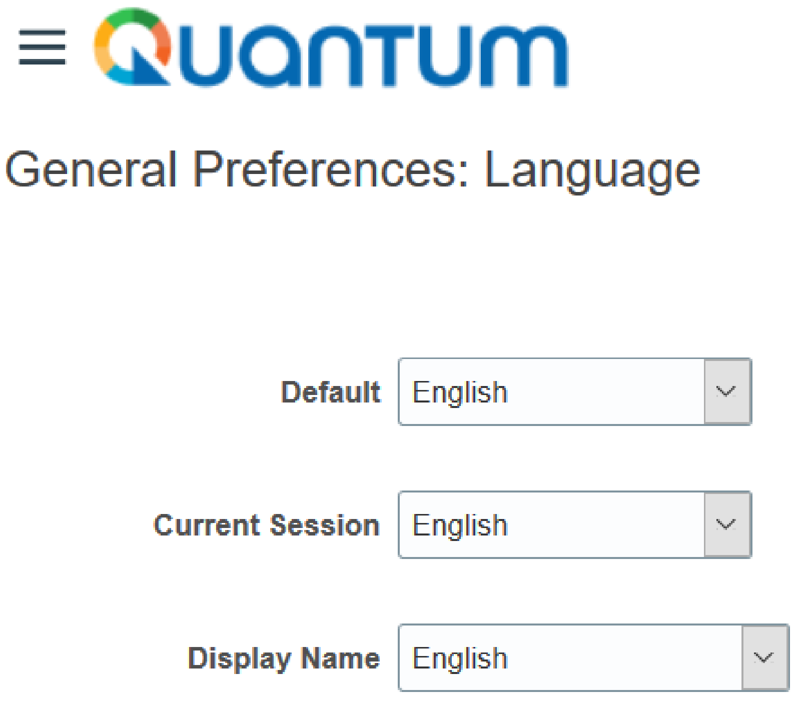
Setting User Preferences – Set the Regional preferences - continued

The default language of the system is English. To set the language preferences click the option *Language*.



Default: Select the default system interface language for your profile.

Current Session: Select the system language for the current session. The system language will go back to the default one at the next login,



Annex 2: Procurement Roles

QUANTUM

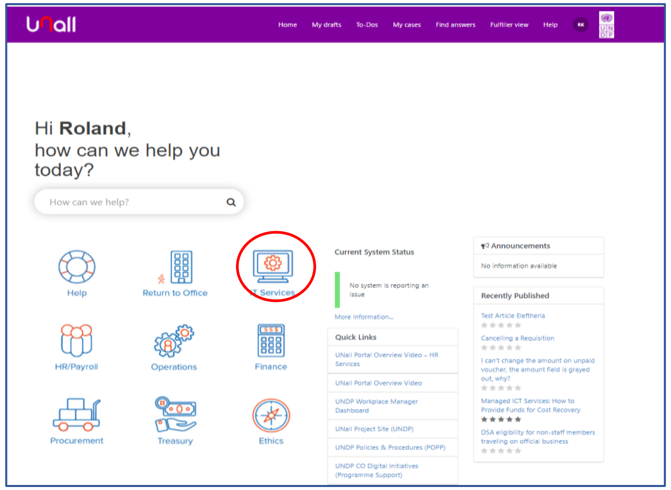
Procurement Roles in UNall system

Role Name	Role Description and function	How to grant it in the system
Requester	Creates procurement requests. Typically assigned to Project staff.	By default to any UNall user
Procurement Fulfiller	Enables additional features of UNall platform. Individuals who are involved in procurement processes through UNall. Typically, any of the roles below will require "Procurement Fulfiller" role as well.	Each user should create an individual request and select the BU CAP Secretary as Approver.
CO Approver	Approves procurement requests in Unall. Typically given to Project Managers and other individuals e.g. who currently have requisition approval rights in ATLAS.	BU CAP secretary assigns the role in UNall
Head of Procurement/OM/DRR	Managing authority in CO/BU who will approve procurement strategy per each case. Typically OM and DRR and Head of Procurement Office for large offices.	BU CAP secretary assigns the role in UNall
Procurement Team	Procurement officers members of a defined procurement team in a BU and involved in handling procurement cases.	BU CAP secretary assigns the role in UNall.
Group Manager	Head of the procurement team managing procurement team, assigning cases, etc.	Only the ITM technical team in UNall can grant this role from the back-end. Create an incident on UNall, provide the name of the Group Manager, with a confirmation from the CO Senior Management.

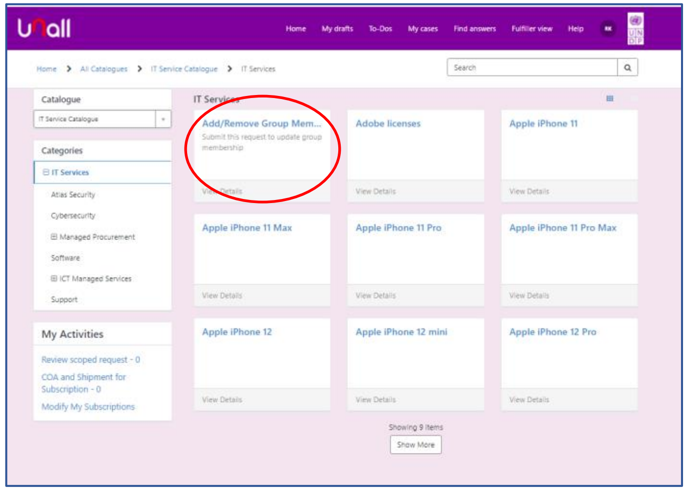
* For roles that can be assigned by CAP secretary in the system, an official approval/memo needs to be in place from BU manager approving who should be given such roles

Create a request for granting access to the *Fulfiller View privilege*

In order to be able to use different functionalities and features that the UNAll platform offers, users have to be granted access to the ***Fulfiller View*** privilege. In addition, to perform specific role in the part of **the procurement process managed** in UNAll, the users have to be selected and assigned different procurement roles.



1. To create the request for granting access to the *Fulfiller View* privilege, login to the UNAll platform and on the Main/Home page click on the ***IT Services*** icon.



2. In the list of the available IT Services, select ***Add/Remove Group Memberships***.

Create a request for granting access to the *Fulfiller View privilege*

1. Enter/select the following data in the request form:

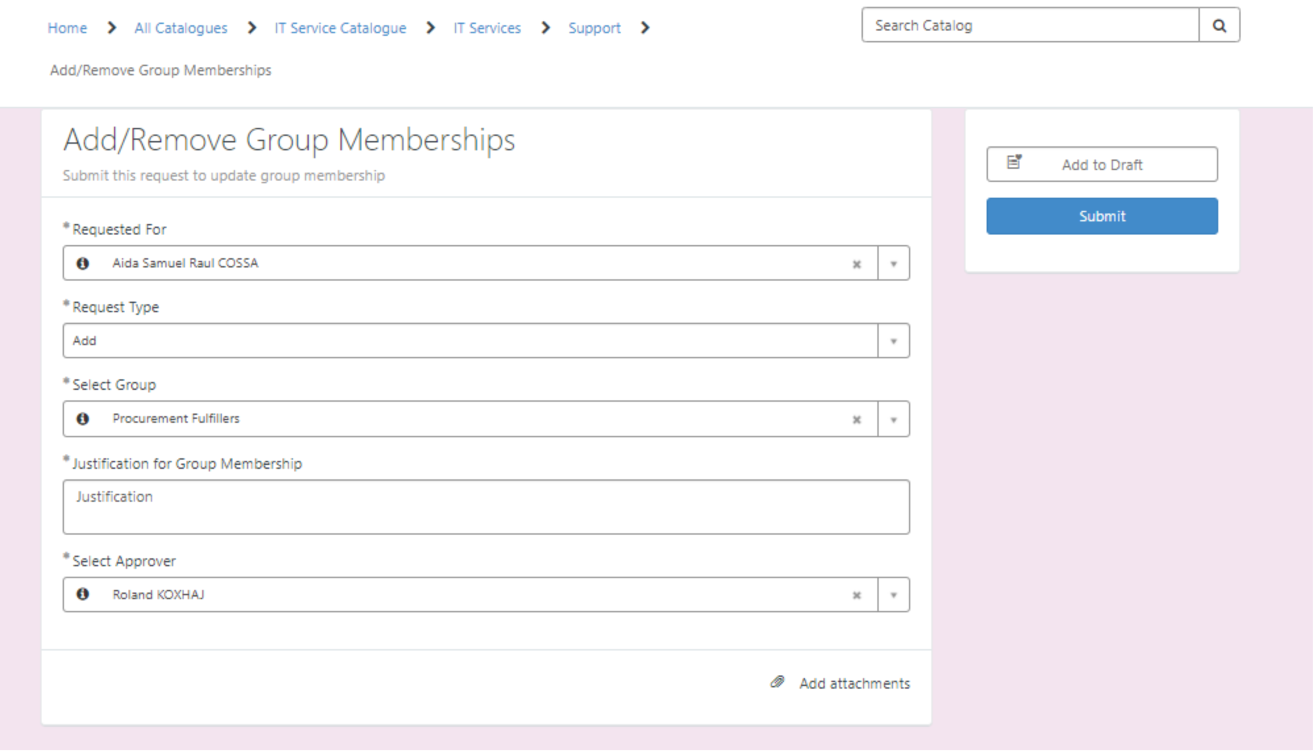
2. * *Requested For* - the person who should be granted the access to the ***Fulfiller View*** privilege.

3. * *Request Type* - select the option ***Add****.*

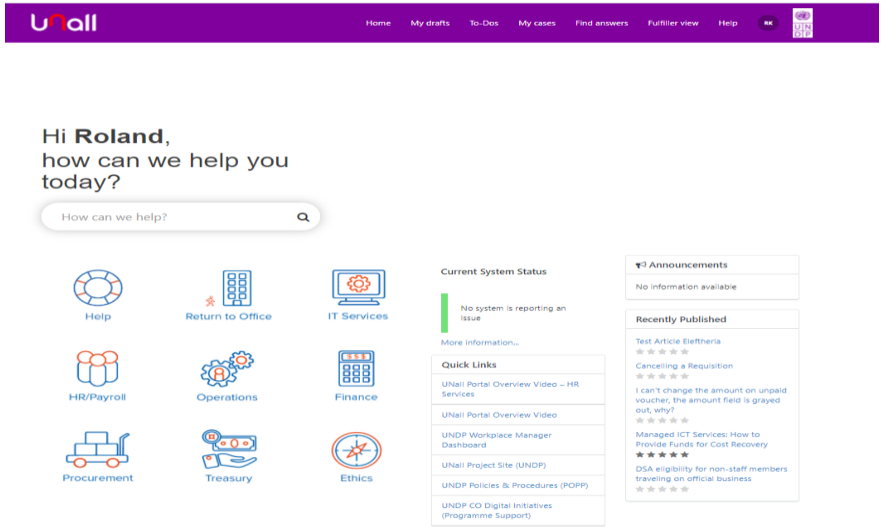
4. * *Select Group* - select the option ***Procurement Fulfillers****.*

5. * *Justification for Group Membership* - enter a brief justification for your request.

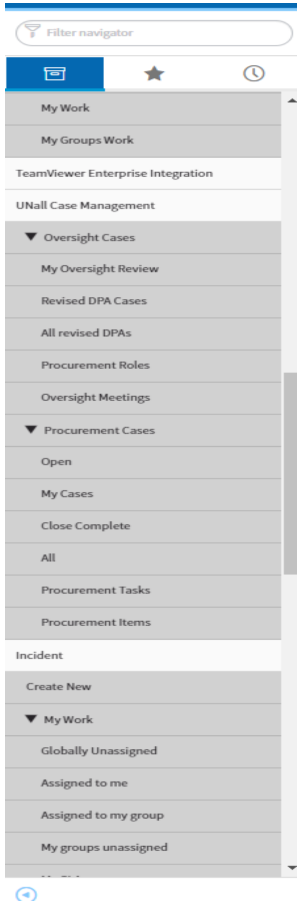
6. * *Select Approver* - select the CAP Secretary as **Approver** for your CO.



Assigning a specific procurement role in the UNAll system



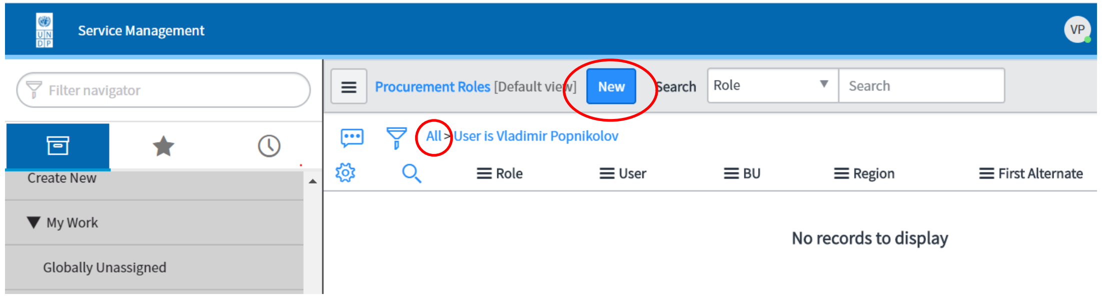
1. To create a request for granting specific role to a user, login to the UNAll platform and on the Main/Home page click on the ***Fulfiller View.*** For roles that can be assigned by CAP secretary in the system, an official approval/memo needs to be in place from BU manager approving who should be given such roles.



2. From the list of functions available to you in the menu, select the option ***UNAll Case Management***. Then, click on the ***Procurement Roles*** option in the menu.

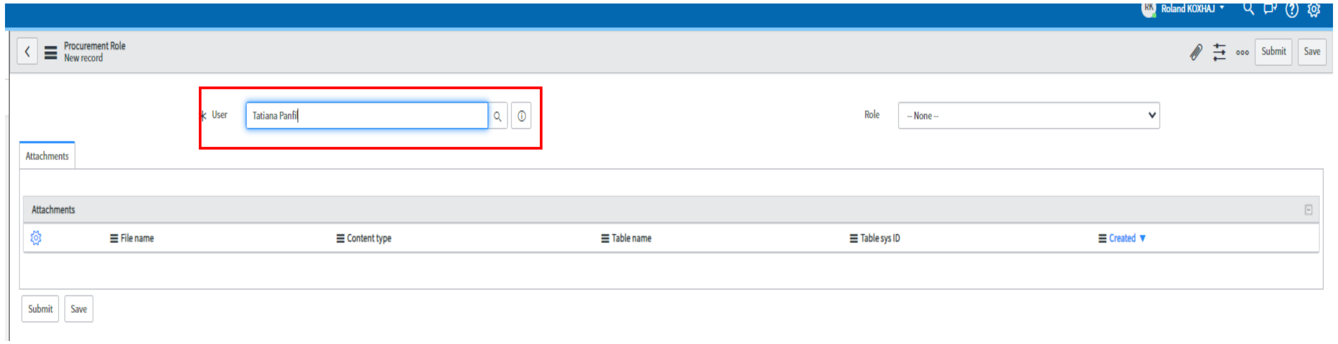
QUANTUM

Assigning a specific procurement role in the UNAll system



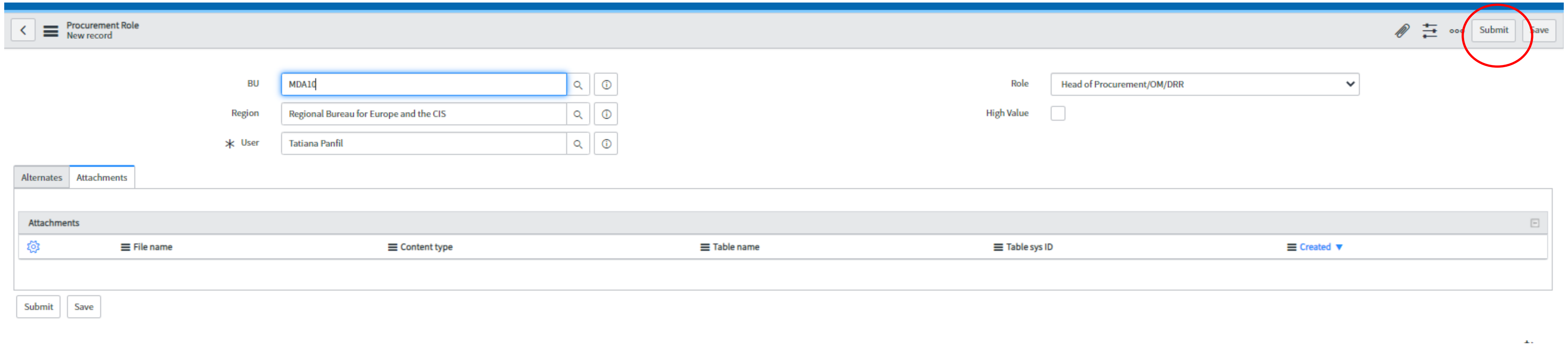
Click on *All* to remover your name from the filter.
To create new request for granting a role to a user, click the button ***New***.

Enter the name of the user or click the ***Look up*** icon and select the name from the list.
Then, select the specific role that you wish to assign to that user. The list of the roles, their description/function and the user who should create the request for each role are available <u>here</u>.



Assigning a specific procurement role in the UNAll system

The *BU (Business Unit)* and the *Regio*n fields will be automatically populated once you select the user and the role.
You can add attachment, if needed, to support your request for granting the role.
To submit your request, click the button *Submit.*



Procurement Roles in Quantum/Oracle system

To request access in Quantum is available.

1. Download the User Creation Request Form - Solicitation. List the users that need access in Quantum and select/assign the appropriate role(s) for each user.

Role Name	Role Description and function
Procurement Officer - Without rights to Approve Event Launch	Create and Manage Negotiations, No Event Launch Approval rights Procurement officers
Procurement Officer - With rights to Approve Event launch	Create and Manage Negotiations along with Event Launch Approval rights. Head of Procurement unit, if authority delegated by Managers
Event Launch Approver - Without Procurement Officer rights	Event Launch Approval rights, View Only access to Negotiations. Manager: OM, DRR, RR
Award Approver	Award Negotiation Approval rights, View Only access to Negotiations Manager: OM, DRR, RR, depending on thresholds. It is a new function and by approving the award, the Approver authorizes the procurement office to initiate the contract.

2. ARGUS approver of the BU should approve the completed form. Use DocuSign to obtain her/his signature.

3. Submit the signed request and the excel version of the form through UNAll as IT incident (click here to see the instructions on how to create the IT incident).

Procurement Roles in Quantum/Oracle system - continued

Download the User Creation Request Form - Solicitation. List the users that need access in Quantum and select/assign the appropriate role(s) for each user.

Role Name	Role Description and function
Procurement Officer - Without rights to Approve Event Launch	Create and Manage Negotiations, No Event Launch Approval rights Procurement officers
Procurement Officer - With rights to Approve Event launch	Create and Manage Negotiations along with Event Launch Approval rights. Head of Procurement unit, if authority delegated by Managers
Event Launch Approver - Without Procurement Officer rights	Event Launch Approval rights, View Only access to Negotiations. Manager: OM, DRR, RR
Award Approver	Award Negotiation Approval rights, View Only access to Negotiations Manager: OM, DRR, RR, depending on thresholds. It is a new function and by approving the award, the Approver authorizes the procurement office to initiate the contract.

2. ARGUS approver of the BU should approve the completed form. Use DocuSign to obtain her/his signature.

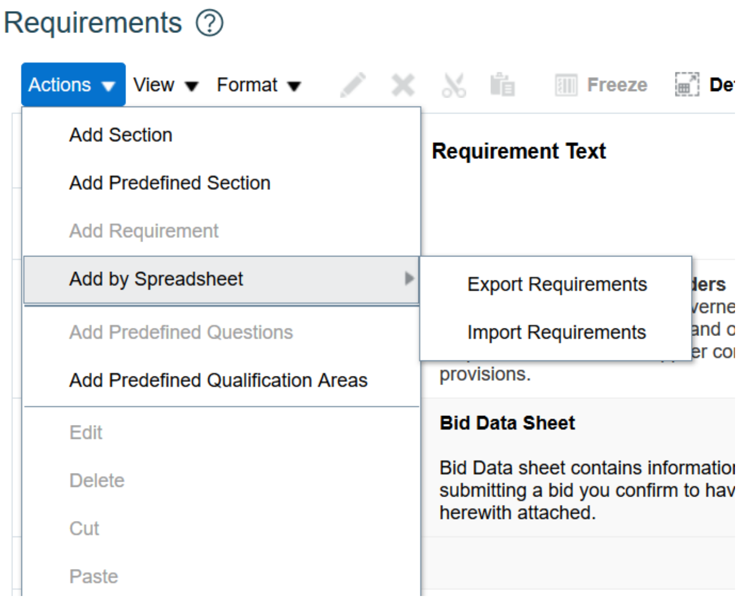
3. Submit the signed request and the excel version of the form through UNAll as IT incident (click here to see the instructions on how to create the IT incident).

Annex 3: Utilize Excel Upload Function in QUANTUM

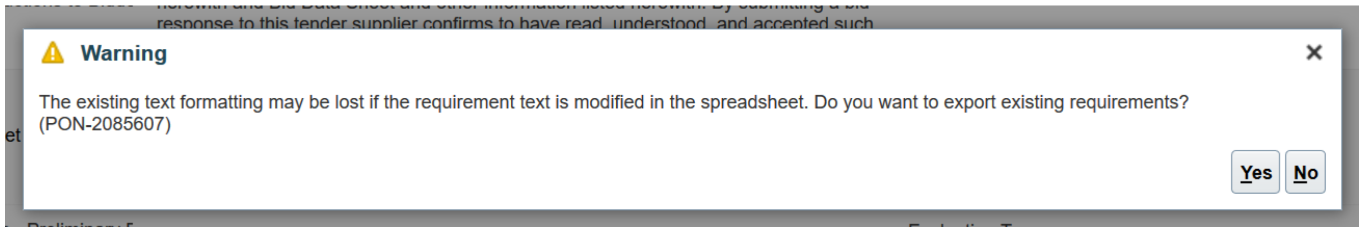
Setup Requirements in a Negotiation using the Excel upload function

Export existing requirements in an excel file

Open the negotiation and click on the Train Stop 3 – Requirements. Click on the *Actions* option, then select the option *Add by Spreadsheet* and click on *Export Requirements.*



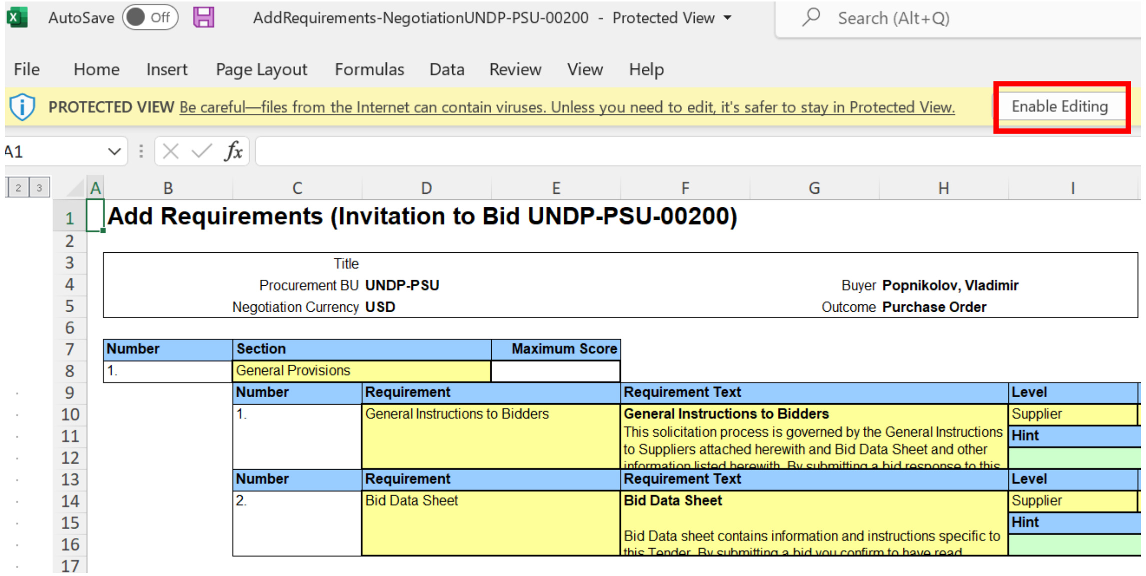
A warning message will pop-up. Select the option *Yes* to export the requirement in excel and save the excel file on your computer.



Setup Requirements in a Negotiation using the Excel upload function (continued)

Edit the requirements in the excel file

Open the file using the excel application and Enable Editing.

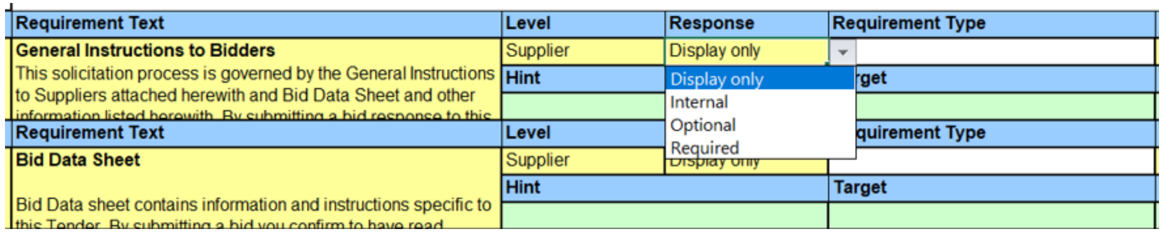


All requirements that were copied form the template are included in the excel file. You can edit the existing requirements, delete the ones that are not relevant for your negotiation or add more requirements (if needed).

To edit the Requirement Title or the Requirement Text, click in the appropriate excel cell and edit the text as necessary. You can also select the appropriate value in the other fields:

- Response
- Requirement Type
- Value Type
- Value Type
- Display Target

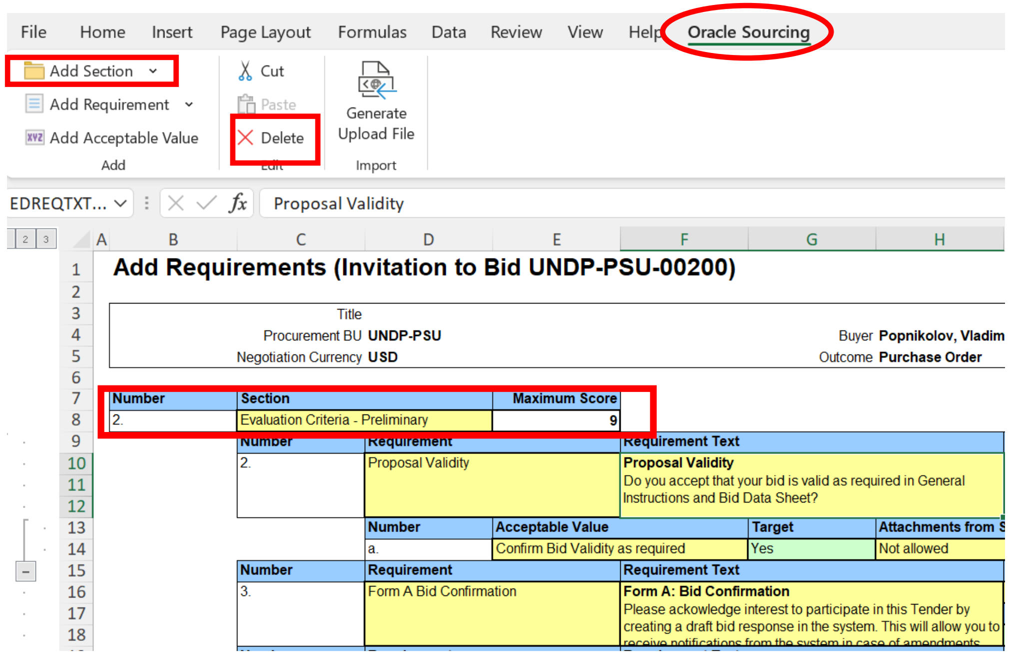
- Attachments from Suppliers
- Scoring
- Maximum Score
- Knockout Score
- Allow comments from Suppliers



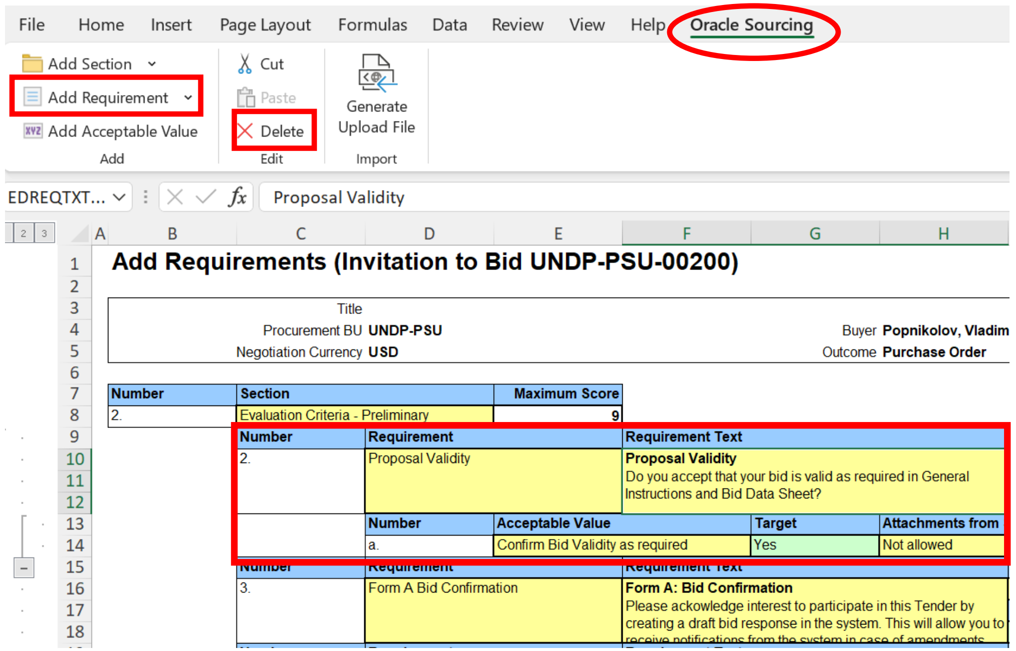
Setup Requirements in a Negotiation using the Excel upload function (continued)

1.Go to the ***Oracle Sourcing*** tab.

To add a ***Section***, click in a cell of a section and click on ***Add Section*** option. The new section will be added below.
To delete a ***Section*** (including all requirements from that section), click in any cell of the first two section rows and click on *Delete*.



To add a ***Requirement***, click in a cell of a requirement and click on ***Add Requirement*** option. The new requirement will be added below.
To delete a ***Requirement*** within a *Section*, click in any cell of that Requirement and click on Delete.



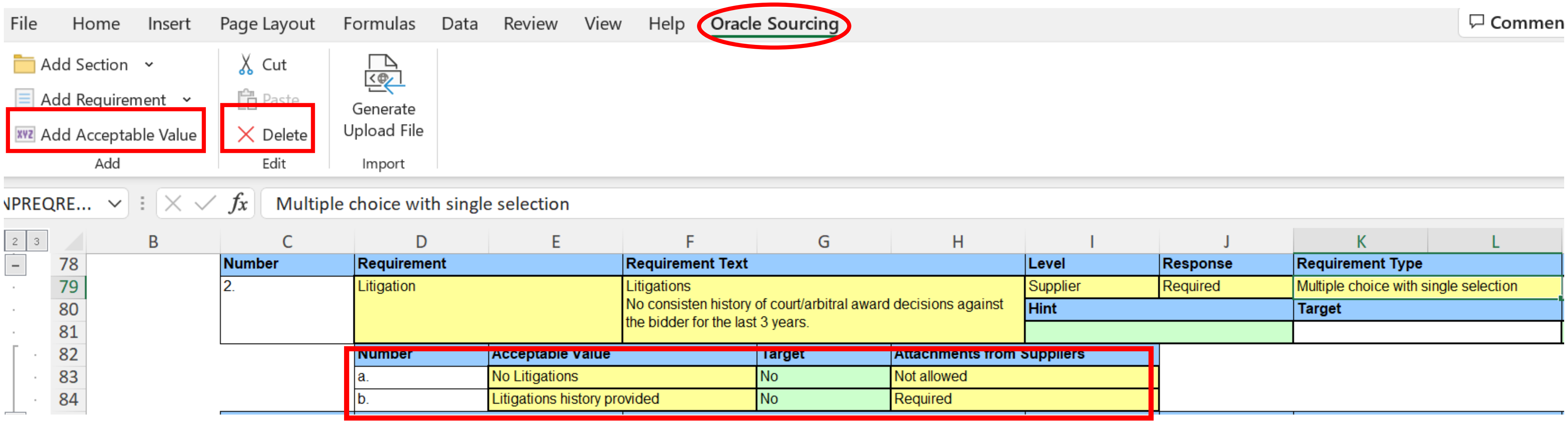
QUANTUM

Setup Requirements in a Negotiation using the Excel upload function (continued)

For *Requirement Types* “Multiple choice with single selection” or “Multiple choice with multiple selection” you can add or delete an *Acceptable Value.*

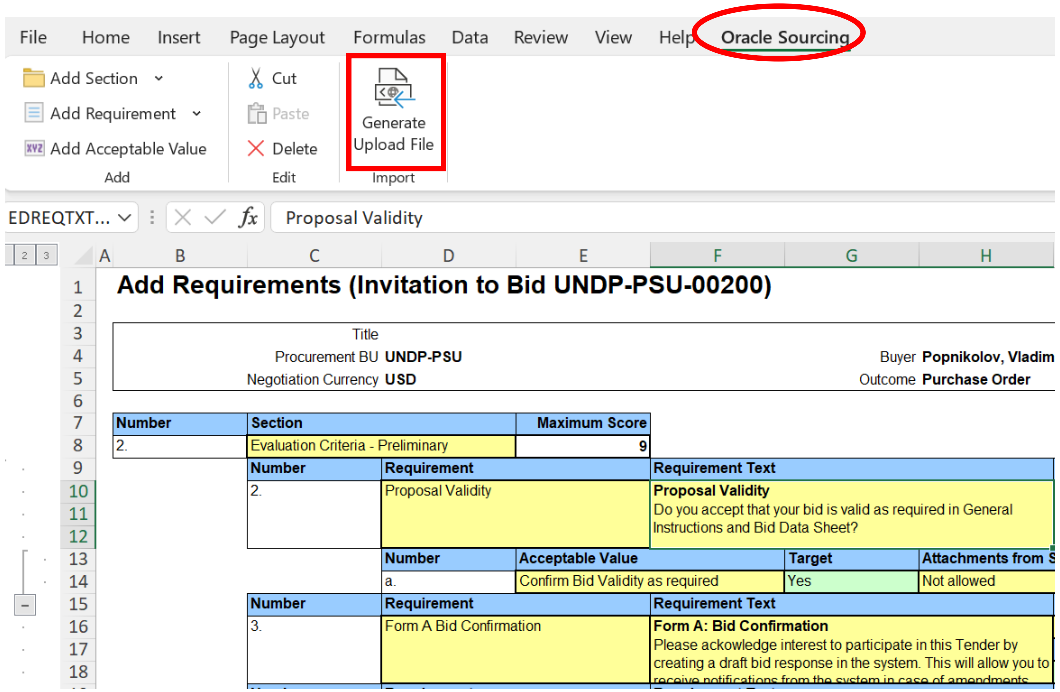
To add, click in any cell of the *Acceptable value* after which you wish to add the new option/value and click on *Add Acceptable Value*. Then, enter the text, select the value’s *Target* and one of the options for the field “Attachments from Suppliers.

To delete, click in any cell of the *Acceptable Value* that you wish to delete and click on *Delete*.



Setup Requirements in a Negotiation using the Excel upload function (continued)

Once the list of the requirements is ready and all correctly set, click on *Generate Upload File.* The file which should be uploaded in the *Requirements* section in the negotiation will be automatically generated in the required format and saved in the same folder where the excel file is placed.

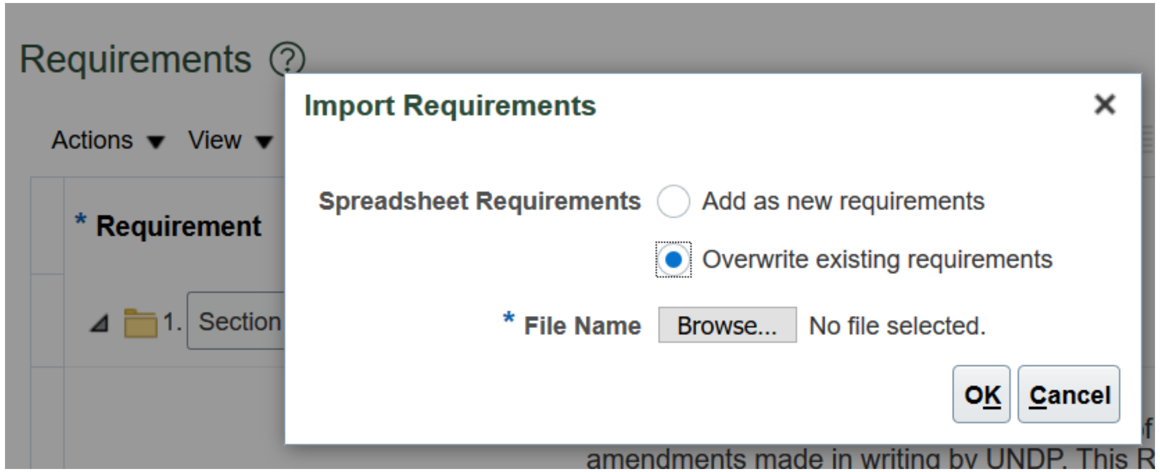


Open the negotiation, go the train stop 3 – *Requirements* and on the *Actions* menu click the option *Import Requirements.*

To add the requirements from the excel to the ones existing in the negotiation, select the option *Add as new requirements.*

To replace the existing requirement with the ones in the excel file, select the option *Overwrite existing requirements.*

Click on *Browse,* select the file generated for the upload and click *OK*.



Setup Requirements in a Negotiation using the Excel upload function (continued)

If you upload the correct file and all the requirements listed in the excel are correctly set, they will be added to or will overwrite the existing ones in the negotiation.

If you upload a wrong file or any of the requirements in the excel is not correctly set, an error message will occur and provide information which row in the excel file should be corrected.

Correct the error in the excel row indicated in the error message, generating new upload file and upload it in the negotiation.

Requirements Import Errors (Request for Quotation UNDP-PSU-…

Correct the errors indicated in your spreadsheet and import again.

File Name AddRequirements (1).zip

Errors

View ▾ Format ▾ Freeze Detach Wrap

Spreadsheet Row Number	Column Title	Value	Error Message
23	Section		You must enter a value.

QUANTUM

5.0 Helpdesk Support and FAQs

This section provides details on who to contact for technical assistance, how to address some commonly asked questions and where to find additional resources on eTendering.

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5.1 eTendering/Quantum Resources

In addition to this User Guide, which should be referred to as a key resource by UNDP procurement personnel implementing eTendering, the following helpful resources are available to eTendering Users:

1. Quantum Teams site

To view a complete list of resources on the new procurement system, including user guides for bidders and users, presentations, webinar recordings and announcements on trainings, please visit and join this the Team space: NextGenERP procurement rollout

2. Public UNDP website with resources for bidders:

http://www.undp.org/content/undp/en/home/operations/procurement/business/procurement-notices/resources/

Currently this site has only guides for existing eTendering system. Supplier guide for the new system is automatically added to each procurement notice that is created directly from Oracle. In near future more guides will be made available directly to tis site as well.

3. Helpdesk support cases

For any system support, create an incident in Unall following the instructions in this guide: How to support request for new procurement system