

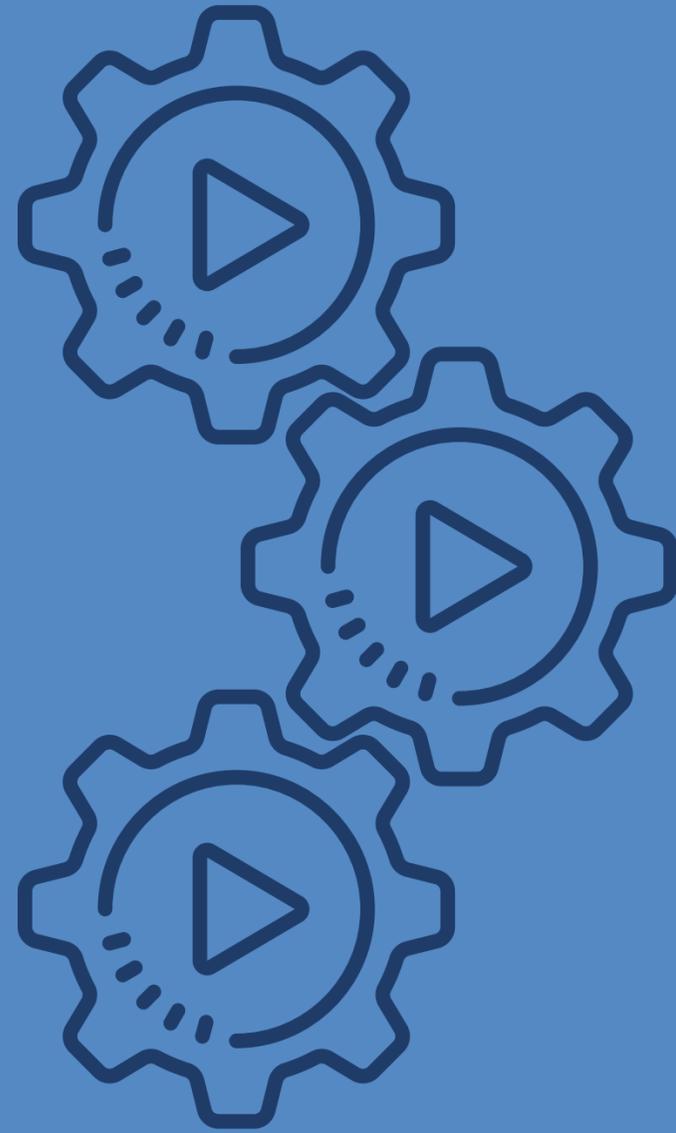


WIPO PROCUREMENT PROCESS

Join the digital transformation

User Guide to the e-Sourcing Platform

for suppliers



A STEP-BY-STEP GUIDE TO:

→ Access Tenders

⚙️ Manage Tenders

📤 Prepare Responses

🗨️ Submit Responses



ACCESS TENDERS

Depending on the type of tender, you can access the tender documents in two different ways:

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

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

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

Please note that any reference to “Buyer” in this document is a reference to “WIPO”.

The screenshot shows the 'My RfXs' section of the platform. The 'RfXs Open to all Suppliers' tab is selected. Below the tabs, there is a filter dropdown set to 'All RFQs' and a search input field with the placeholder text 'Enter Filter (type to start search)'. Below the search field, a table header is visible with the following columns: Code, Title, Project Code, Closing Date, Status, Response Status, and Buyer Organisation.

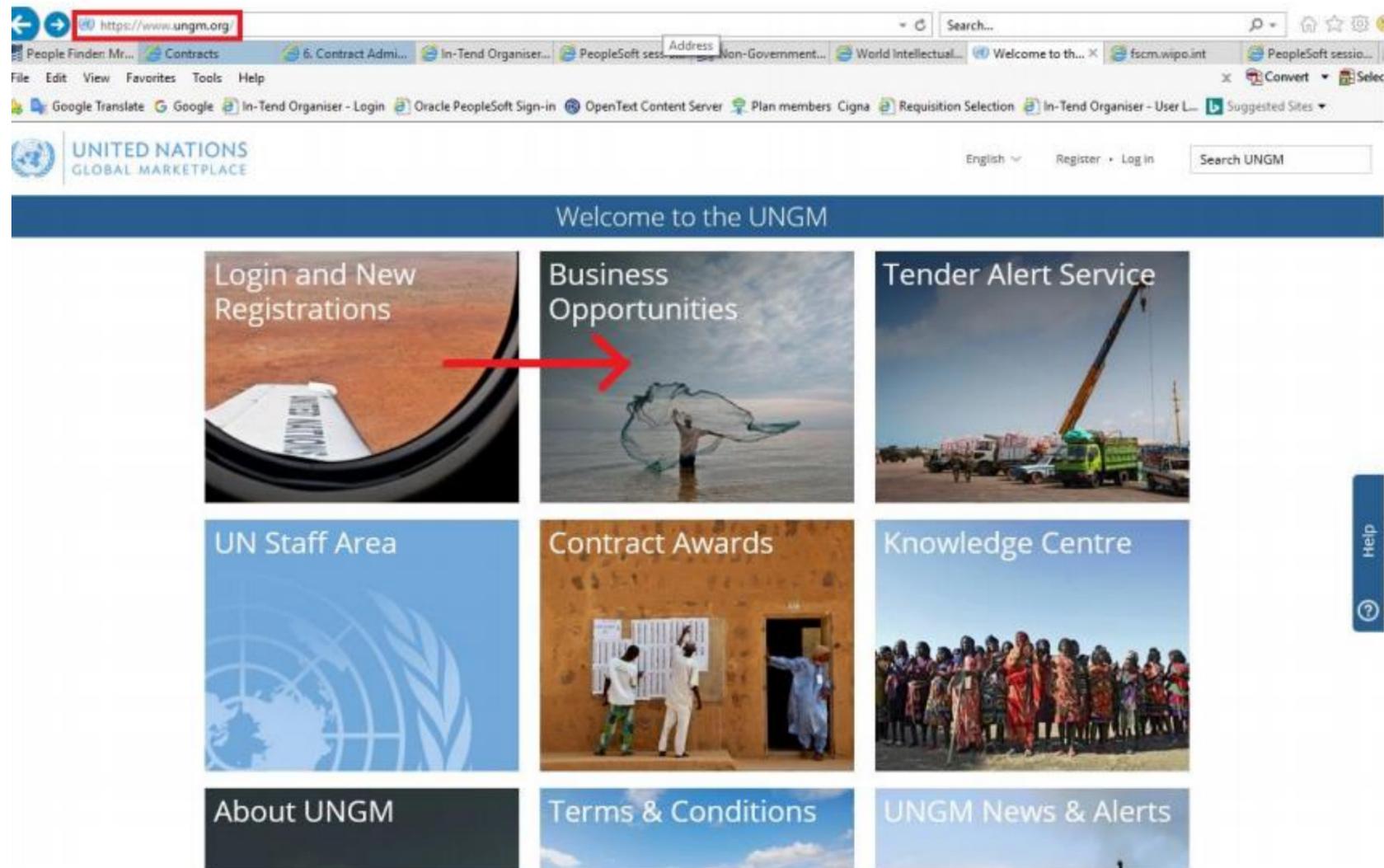


ACCESS TENDERS open to all

From the United Nations
Global Marketplace (UNGM)
homepage

<https://www.ungm.org/>

➔ click on "**Business
Opportunities**".



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



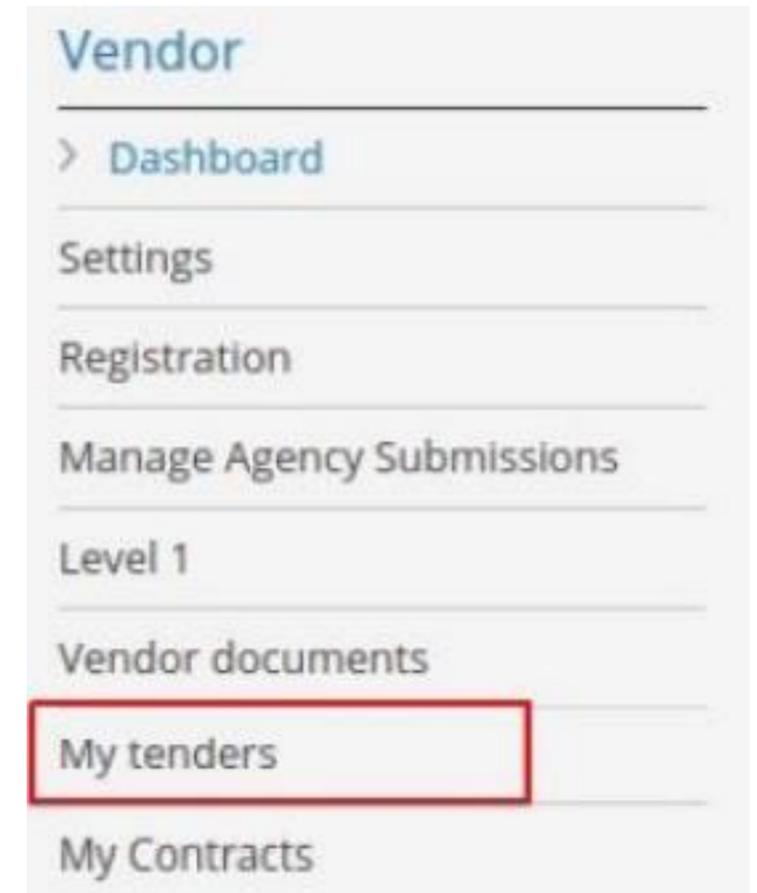
ACCESS TENDERS open to all

Once logged into the UNGM website, ➡ click on either **Tender notices** or **My tenders** on the menu on the left-hand side.

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



Clicking on **My tenders** will show any tenders that you have been invited or attached to, along with any tenders for which you have expressed interest.





ACCESS TENDERS open to all

The **Search tender notices** page will appear. Use this feature to search Title, Description, Reference, Publish and Deadline dates.

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

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

The screenshot shows the 'Search tender notices' page on the United Nations Global Marketplace. At the top left is the UN logo and 'UNITED NATIONS GLOBAL MARKETPLACE'. At the top right are links for 'English', 'Register', 'Log in', and a 'Search UNGM' box. The main header is 'Search tender notices'. Below this is a yellow banner with a warning icon and text: 'Wish you had known about a tender earlier? Wish you had more time? We connect vendors to tenders. [Subscribe to the Tender Alert Service now.](#)'. The search form includes fields for 'Title', 'Description', 'Reference', 'Published between' (with '30-Jan-2019' entered), and 'Deadline between' (with '30-Jan-2019' entered). A 'Clear All' button is at the bottom left of the form. A red arrow points to the 'Show more criteria' button at the top right of the form. A vertical 'Help' button is on the right side of the page.



ACCESS WIPO'S TENDERS

In the field **UN Organization**, please select “**WIPO**” from the drop-down list. The system will automatically display active tender notices published by WIPO.

On the left side of each tender notice, you will find a **blue Express Interest** button if it is the first time you are seeing the notice.



Search tender notices

Wish you had known about a tender earlier? Wish you had more time?
We connect vendors to tenders. [Subscribe to the Tender Alert Service now](#)

Home
About UNGM
Registration process
Code of conduct
Terms & Conditions
Tender notices
Contract awards
Tender Alert Service
Knowledge centre
UNSPSC
Help Centre
Press release

Vendor
Dashboard
Settings
Registration
Manage Agency Submissions
Level 1
Vendor documents
My tenders
My TAS
Tips
My Business Seminar

Title
Description: security
Reference
Published between: 24-Jan-2019 and 24-Jan-2019
Deadline between: 24-Jan-2019 and
UN Organization: WIPO
Beneficiary country/territory: Type a country/territory nam
UNSPSC Codes: [Select UNSPSC](#)
Type:
 Not set Request for EOI Request for proposal Request for quotation
 Invitation to bid Request for pre-qualification Request for information
 Grant support-call for proposal Pre-bid notice

Clear All

Displaying results 1 to 2 of 2

Deadline	Published	UN organization	Type of notice	Reference	Beneficiary country/territory
20-Feb-2019 16:00 (GMT 1.00)	24-Jan-2019	WIPO	Request for proposal	AMS_SIAD/2018/209/RFP	Switzerland
12-Feb-2019 16:00 (GMT 1.00)	14-Jan-2019	WIPO	Request for proposal	AMS_SIAD/2018/153/RFP	Switzerland



ACCESS TENDERS open to all

➔ Clicking on a notice through the icon  you will see few tender details.

If you open the event, you can also ➔ click on the **Express Interest** button in the pop-up window that appears as shown here.



The screenshot shows a tender notice for 'LTATest' with the following details:

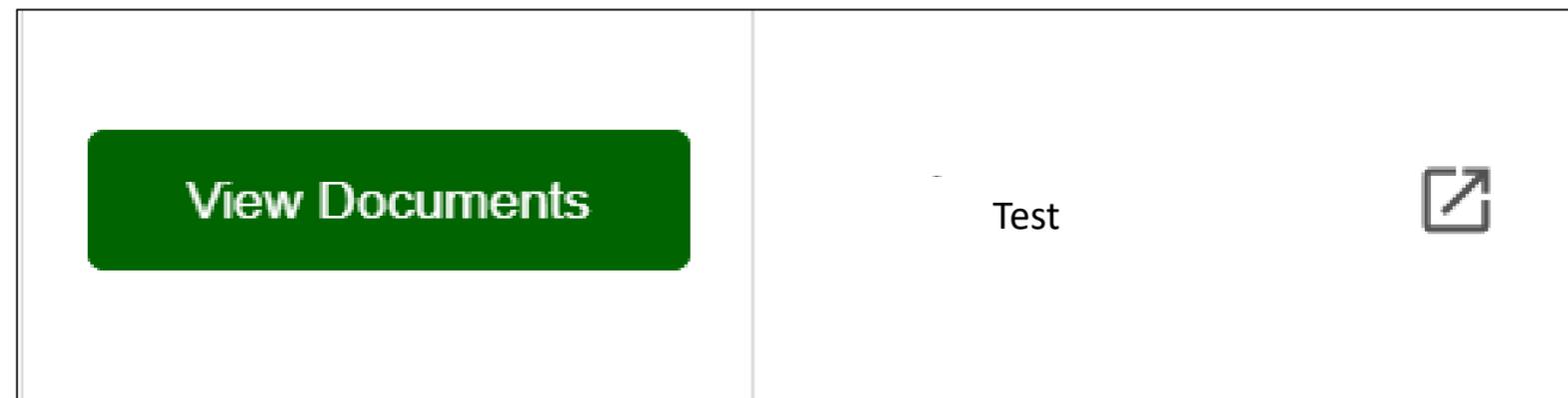
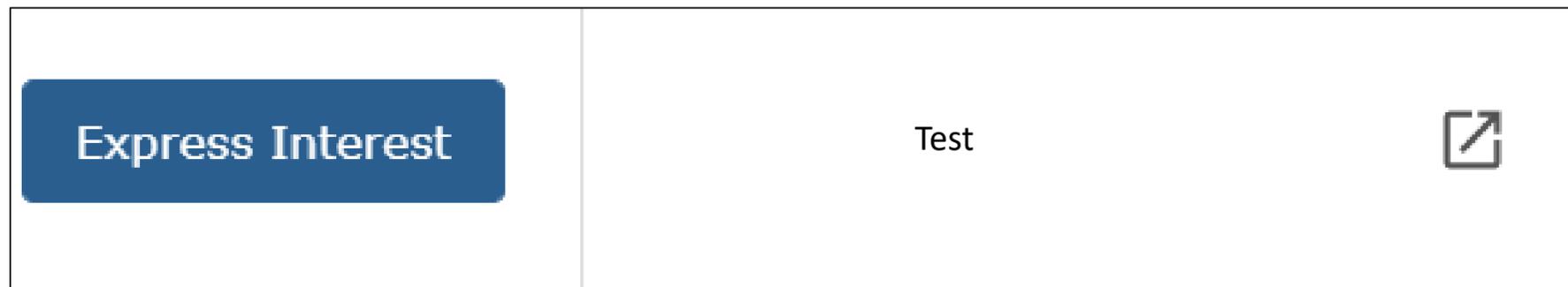
- Title:** LTATest Request for quotation
- Reference:** rfx_284
- Beneficiary country(ies):** Multiple destinations (see 'Countries' tab below)
- Registration level:** Basic
- Published on:** 01-Apr-2021
- Deadline on:** 30-Apr-2021 16:00 0.00

An **Express Interest** button is located in the top right corner. Below the details is a **Description** section containing the text 'LTATest'. At the bottom, there are four tabs: **Contacts** (selected), **Links**, **Countries**, and **UNSPSC**.



ACCESS TENDERS open to all

Once clicked, this **Express Interest** button changes to a **green View Documents** button. Click on this button to access the tender documents.



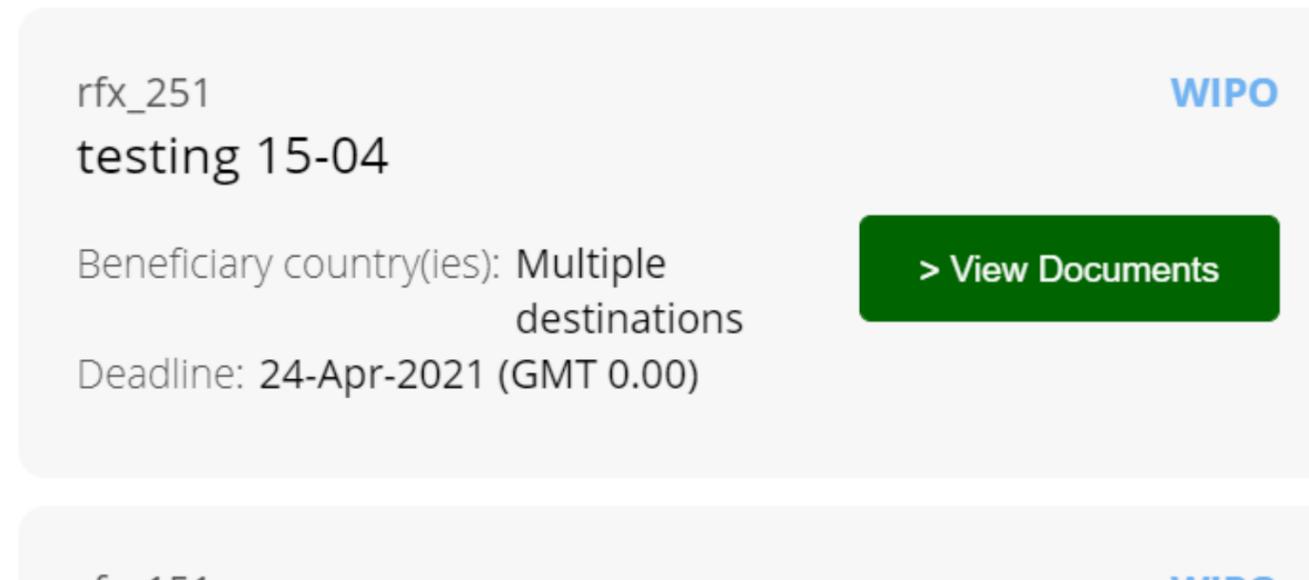
If you click on “**View documents**”, you will be redirected to the **UNGM Identity center**, where the UNGM credentials are requested in order to access the WIPO e-Sourcing platform.



ACCESS TENDERS on invitation

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

MY EXPRESSIONS OF INTEREST



The screenshot displays a list of tenders under the heading "MY EXPRESSIONS OF INTEREST". The first entry is for "rfx_251 testing 15-04" and is associated with "WIPO". Below the title, it specifies "Beneficiary country(ies): Multiple destinations" and "Deadline: 24-Apr-2021 (GMT 0.00)". A green button labeled "> View Documents" is positioned to the right of the entry details. A second, partially visible entry for "rfx_151" is shown below.

If you click on “**View documents**”, you will be redirected to the **UNGM Identity center**, where the UNGM credentials are requested in order to access WIPO e-Sourcing platform.



ACCESS WIPO e-SOURCING PLATFORM

Please note: You remain logged in WIPO e-Sourcing platform for 30 days according to UNGM password and security rules. You will not be requested to re-enter your UNGM credentials during this period unless you log out from WIPO e-Sourcing platform, or you delete your cookies.

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

Please note: This step is required only the first time you want to access WIPO e-Sourcing platform.

The screenshot shows the 'United Nations Identity Center' login page. It features the UN logo and the text 'UNITED NATIONS GLOBAL MARKETPLACE Identity Center'. Below this is a 'Login' section with two input fields: 'Username' and 'Password'. There is a checkbox for 'Remember My Login' and a blue 'Login' button.

The screenshot shows a permission request page from the 'United Nations Identity Center'. The header includes the UN logo and 'UNITED NATIONS GLOBAL MARKETPLACE Identity Center' with a user name 'Marcelo Tellez'. The main heading is 'WIPO eSourcing is requesting your permission'. Below this, it says 'Uncheck the permissions you do not wish to grant.' There are two sections: 'Personal Information' and 'Application Access'. Under 'Personal Information', there are three items: 'Your user identifier (required)' (unchecked), 'User profile' (checked), and 'Your email address' (checked). Under 'Application Access', there is one item: 'Offline access' (checked). At the bottom, there are two buttons: 'Yes, Allow' (highlighted in blue) and 'No, Do Not Allow'. A small 'WIPO eSourcing' logo is also visible.



TENDER MANAGEMENT

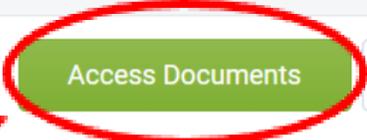
You will then be taken to WIPO e-Sourcing platform where you have to  click on **Access Documents** to have access to all tender details.

▼ RFX: rfx_174 - ec2 test4

 Running

Project: project_56 - ec2 project

Closing Date: 08/03/2022 09:00:00

 Access Documents

 Decide Later

 Printable View

Response Status

Response Status

No Response Prepared

Overview

Code

rfx_174

Title

ec2 test4

Description

Event Currency



TENDER MANAGEMENT

Along with the RFX setting and project titles and codes, the RFX header displays the **closing date** and supplier submission date. If the response date has passed, this information will be highlighted in yellow.

The screenshot displays the RFX management interface for a closed RFX. The RFX title is "RFX: rfx_329 - Request for quotation_test" with a status of "Closed: To Be Evaluated". The project is "Project: project_85- testtesttest". The closing date is "09/04/2021 15:11:00" with a yellow highlight and a warning: "(If you Submit a new Response now, it will be late)". The response status is "Response Last Submitted On: Not Submitted Yet". A yellow warning banner states: "Warning: You have unread Buyer Attachments (1). Click here to read the files before Submitting your Response." The navigation bar includes "RFX Details", "Messages (Unread 0)", "Settings", "Buyer Attachments (1)", "My Response", and "Associated Users". An orange alert banner says: "Your Response is not yet Submitted. To make it visible to the Buyer you must click 'Submit Response'". At the bottom right, there are buttons for "Submit Response" and "Online Questionnaire in Excel".

If the buyer has provided attachments to the RFX, a link to the attachment(s) will be displayed prominently above the RFX navigation. This action link will take you to **RFX Details > Buyer Attachments (nbr)** area.



DOWNLOAD TENDER DOCUMENTS

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

Response Last Submitted On: **Not Submitted Yet**

RFX Details Messages (Unread 0)

Settings Buyer Attachments (1) My Response Associated Users

Path: root >

[Mass Download](#) ...

Enter Filter (type to start search) ▾

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

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



PREPARE RESPONSE

On the **RFX page**, you can choose to **Create Response** or to **Decline to Respond**.

If you choose to decline, you are presented with a comment field to **Enter Decline to Respond Reason Details**.

Edit Mode

Decline To Respond

Cancel

Decline To Respond

Enter Decline to Respond Reason Details

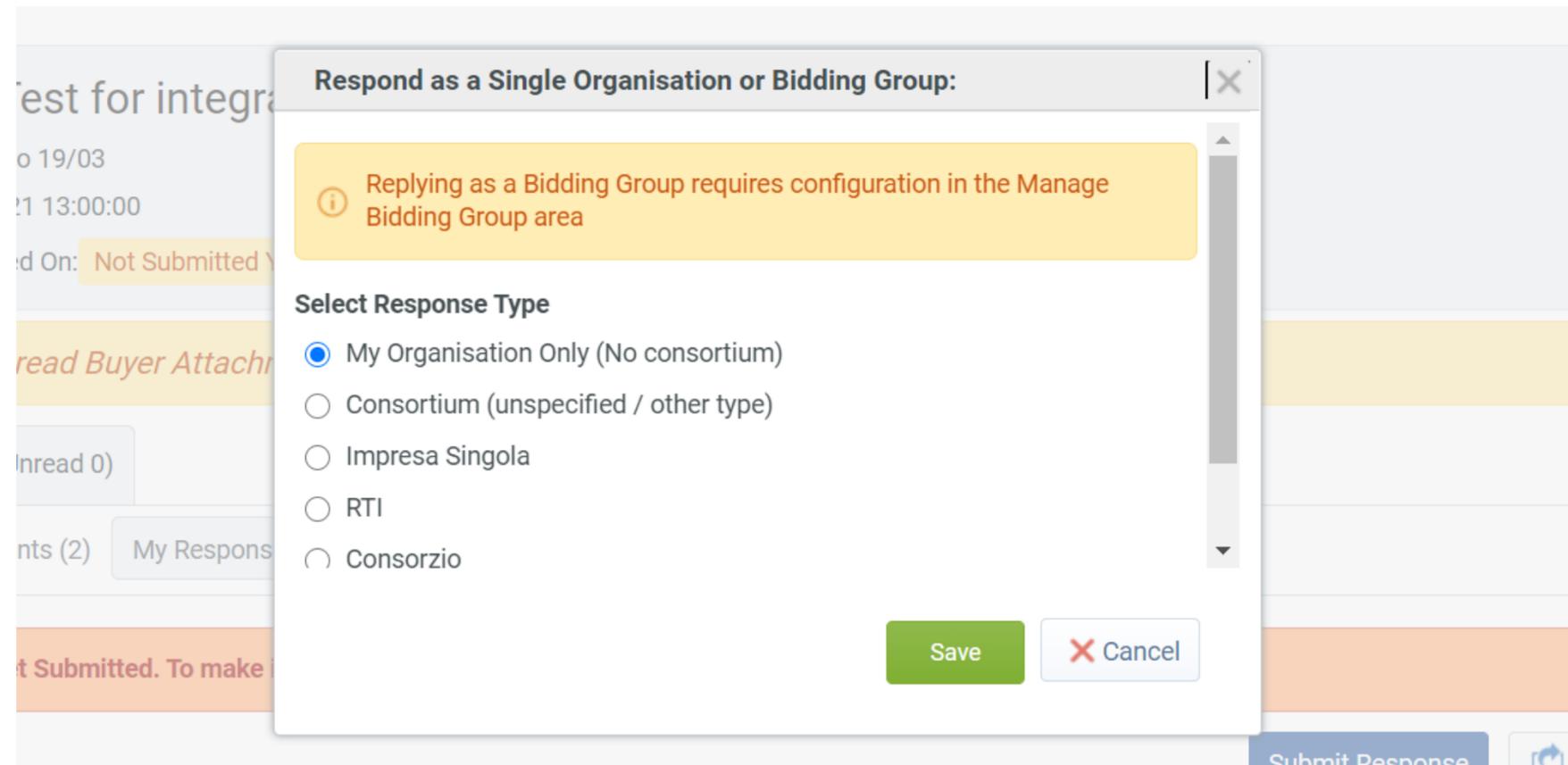
Characters available 512



PREPARE RESPONSE

When you click **Create Response** in an RFX that has been configured to allow responses by Bidding Groups, a screen overlay appears.

You cannot close this overlay until you select one of the choices presented to indicate if you are bidding as a single organization or as a group.
WIPO only requires one of the first two top options.





PREPARE RESPONSE

An RFX is composed of, at most, 3 response envelopes (Qualification, Technical, Commercial).

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

RFX Details Messages (Unread 0)

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

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

[Submit Response](#) [Online Questionnaire in Excel](#)

My Response Summary

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



PREPARE RESPONSE

➔ Click **Edit Response** for each envelope, completing the sections within the envelope and ensure that you save your responses before moving to the next envelope.

Mandatory questions are marked with a *.

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

➔ Click **Save and Continue** to remain in the current envelope. Alternatively, ➔ click on **Save and Return** to exit the current envelope and navigate back to My Response.

The screenshot displays the response preparation interface with the following elements:

- A light blue bar at the top indicating "Response Last Submitted On: Not Submitted Yet".
- A yellow bar labeled "Edit Mode".
- An orange warning bar with a triangle icon: "Your Response is not yet Submitted. To make it visible to the Buyer you must click 'Submit Response'".
- Four action buttons at the bottom right:
 - "Save and Return" (green button)
 - "Save and Continue" (white button with a floppy disk icon)
 - "Cancel" (white button with a red X icon)
 - "Validate Response" (white button with a checkmark icon, circled in red)

Red arrows point from the "Save and Return" and "Save and Continue" buttons to the warning bar.



PREPARE RESPONSE offline

➔ Click the **Online Questionnaire in Excel** button to respond to the RFX offline.

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

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

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

Submit Response

 Online Questionnaire in Excel

My Response Summary



COMMUNICATE WITH WIPO

You also have the possibility to communicate with WIPO through the tabbed section **Messages**.

The screenshot displays the interface for an RFQ titled "RFQ: rfx_100 - test 19/03 EOI". The status is "Running". Key details include the project name "Project: project_45- test 19/03 EOI", a closing date of "30/03/2021 13:00:00", and a response status of "Not Submitted Yet". A yellow warning banner indicates "Warning: You have unread Buyer Attachments (3). Click here to read the files before Submitting your Response." Below this, there are two tabs: "RFQ Details" and "Messages (Unread 0)", with a red arrow pointing to the "Messages" tab. A navigation bar contains links for "Create Message", "Received Messages", "Sent Messages", "Draft Messages", and "Forwarded Messages". At the bottom right, there are two buttons: "Create Response" and "Decline To Respond".

Please note that if a buyer has set a date under **End date for Suppliers to submit Clarifications Requests**, ensure that all relevant communications are sent within the specified date.

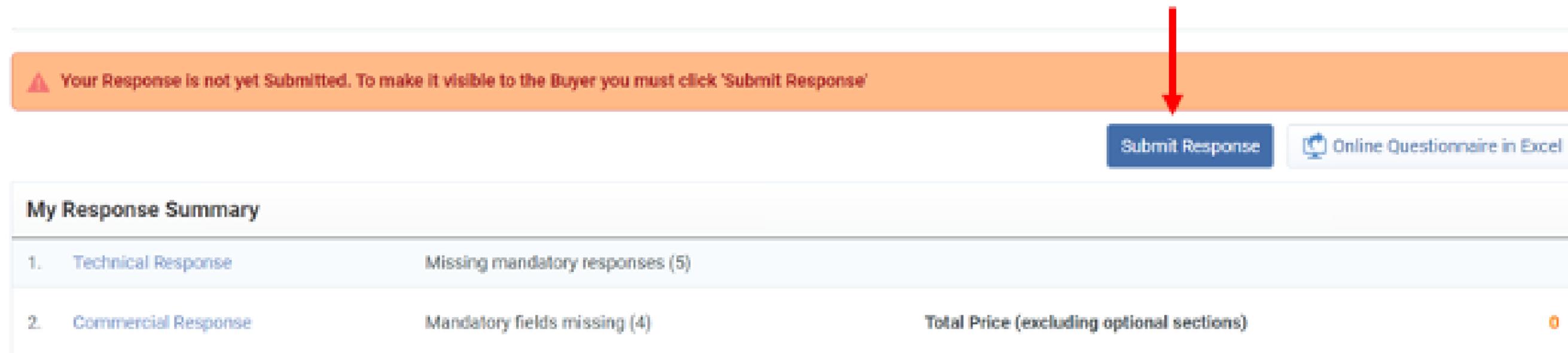


SUBMIT RESPONSE

When the response is complete,  click **Submit Response** on the **RFX Details > My Response** page to submit your response.

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

After the response is submitted, the response status will change from **Response to be Submitted to Buyer** to **Response Submitted to Buyer**.



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

[Submit Response](#) [Online Questionnaire in Excel](#)

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



MANAGE AN RFX: edit and delete responses

You may edit or delete your responses at any time before the RFX's Closing Date and Time.

- To modify responses online, navigate to **RFX Details > My Response** and ➡ click **Edit Response**. When finished, you have the option to **Keep Changes** or to **Discard Changes**. Once all changes are complete, ➡ click on **Submit Changes** to finalize the modifications.
- To modify responses offline, download the Excel questionnaire, update your responses, and then import the questionnaire again into the system.
- To delete your response, navigate to **RFX Details > My Response** and ➡ click the **Delete Response** option in the **More** menu. Once confirmed, all previous responses will be deleted. You will return to the **My Response page**, where you will have the options to **Create Response** or **Decline to Respond**.



PRINT RESPONSE SUMMARY

[Back to List](#)

[Withdraw Response](#) ⋮

[Printable View](#) ⌵

RFQ: rfx_99 - test 19/03 RFP

Project: [project_44](#) - test 19/03 RFP

Closing Date: 31/03/2021 12:01:00

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

Zoom 100% Print Download PDF Close

rfx_154 - Boat

User	Date
Test Supplier 2	26/03/2021 14:09:14 - Time Zone: CET - Central Europe Time

Buyer Organisation
Wipo Superuser

Project Information

Project Code	Project Title
tender_20	eSourcing Test Two envelopes

Response Status

Response Status	Last Submitted On
Response Submitted To Buyer	26/03/2021 09:51:11



CONTACT & ASSISTANCE:

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

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