OECD ESOURCING PORTAL SUPPLIER GUIDES

1/ How to Update Organisation Profile and Data page 2 to 7
2/ How to answer online Invitations to tender page 8 to 13

OECD
BETTER POLICIES FOR BETTER LIVES

1/ HOW TO UPDATE ORGANISATION PROFILE AND DATA ON THE ESOURCING PORTAL
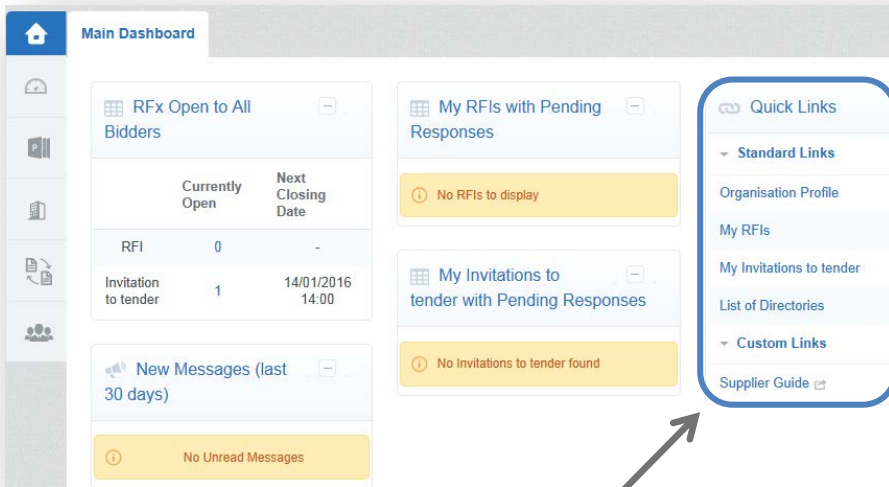
Consult/Update User Profile

💡 Profile data are filled in during the registration process on the OECD eSourcing Portal, or during a specific Invitation to tender process.

**The Quick Links enable you to access your favorite menus with one click (e.g. Profile).**

➢ You can access the full list of Invitations to tender in corresponding Main Menus or find Supplier Guides.
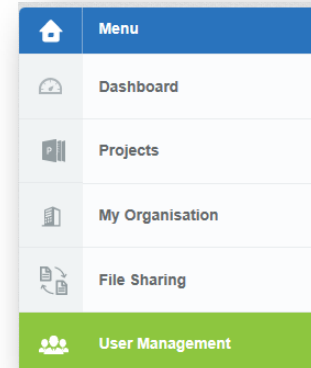
➢ Click on **your name** on the top right if you want to modify the navigation language for the current session

➢Click on **User Profile** to consult, update your Profile data and/or modify your password

➢ Click on **Edit** to modify your user details (ex: Name, Address details) then on **Save**
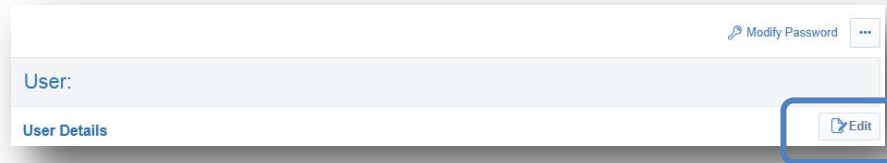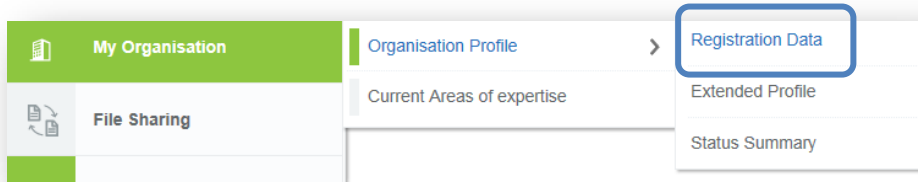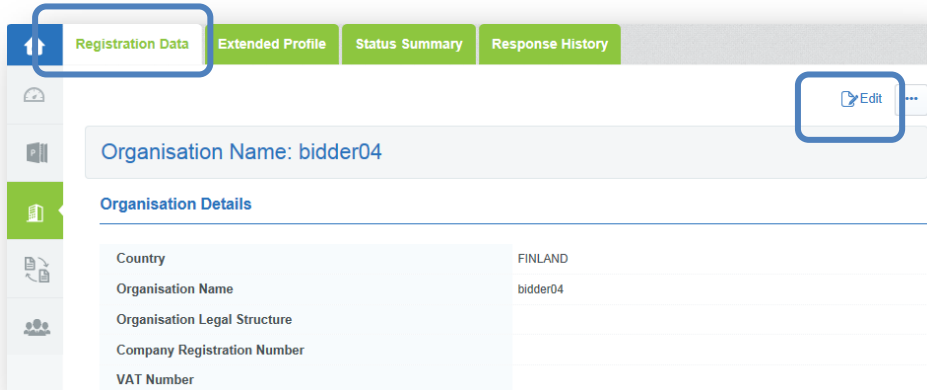

➢ **Main Menus** are available on the left of the screen

Consult/Update Organisation Profile

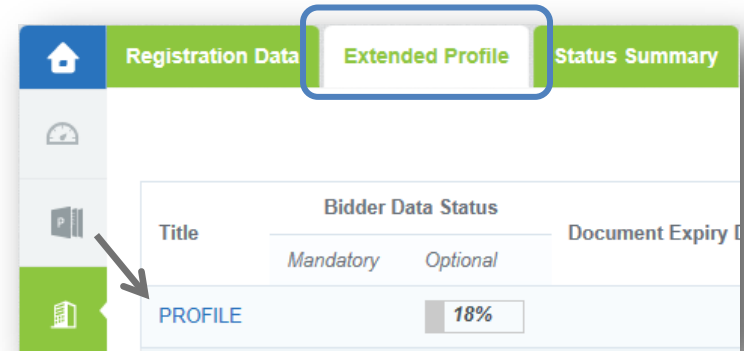➤ Access Menu **My Organisation** to update organisation details and manage Areas of Expertise.

➤ Update your **Organisation Profile** details from the **Registration Data** tab.

➤ Click on **Edit** to modify your Organisation details (ex: Address details, Admin account details,…)

➤ Update your Organisation Extended Profile data from the **Extended Profile** tab.

➤ Click on the Profile Title to open the form

➤ Click on **Edit** to fulfill / update answers and documents

➤ Then Click on **Save and Continue**

**Progress rate is automatically updated for Mandatory and Optional data.**

Please note that current Profile answers will be automatically populated within your pending Qualification Response to an Invitation to tender.
It is possible to update them from your Profile section or later on, directly within the Invitation to tender.
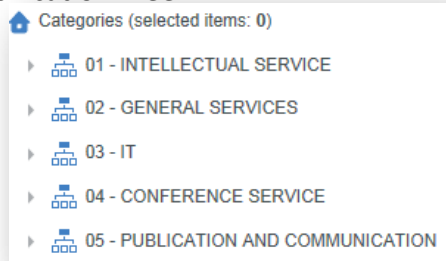
Manage Areas of expertise

➤ Create / Update the list of Goods or Services that your organisation could provide to the OECD from the **Current Areas of expertise** sub tab of Menu **My Organisation**
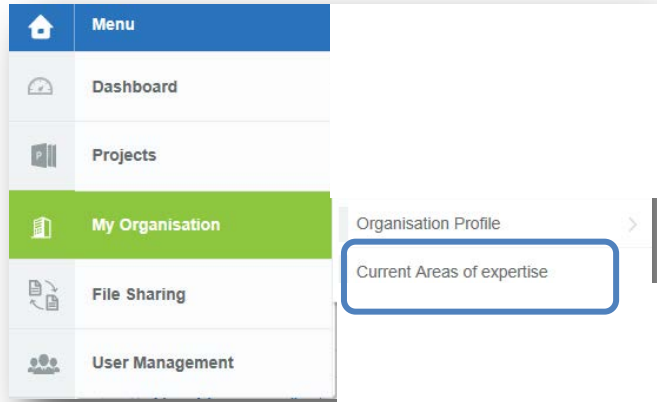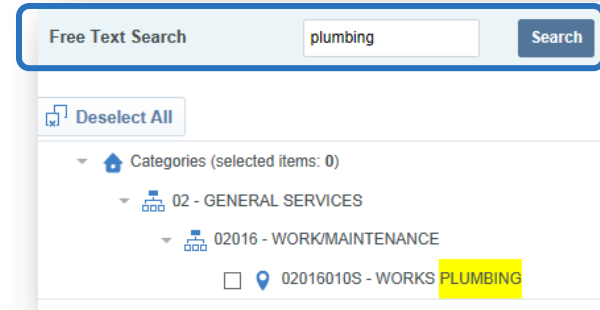

➤ Click on **Add Area of Expertise** to select activities in the OECD Purchasing Classification Tree.

➤ You can Search Areas within the entire tree by clicking on

➤ Or Search by using key words (e.g. Maintenance) in the Free Text Search field and click on Search.

💡 Results are highlighted

➤ Select activities by ticking accurate boxes

➤ Click on **Confirm Current Selection**

OECD's buyer is automatically notified on any updates made on Areas of Expertise. This good practice will increase your organisation visibility from OECD Purchasing Central Group

➤ For information on your access to the OECD eSourcing Portal and use, please contact the service:
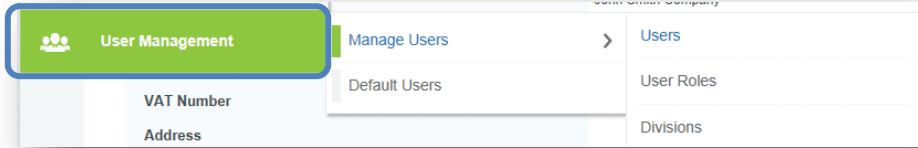Tel. 0033 146 095 672
oecd@bravosolution.com
➤ For information on purchasing procedures, please use the Messages section available in the Invitation to tender to contact the Buyer in charge at the OECD
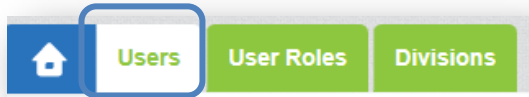
Manage Contact Users

➢ Access Menu **User Management** to **Manage Users** and associated **User and User Roles** within your organisation.

➢ Access the **Users** tab to declare and/or update contacts within your organisation (e.g. Sales Manager) and click on *Create*

➢ Fulfill all mandatory fields* (e.g. Last name, First Name, Email, User name, …) and click on *Save*

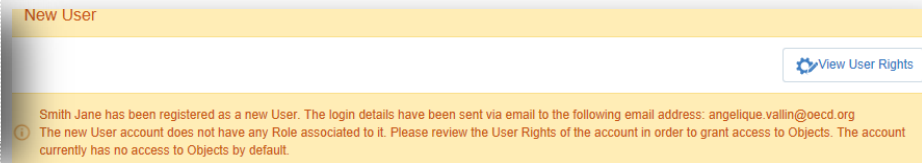**User Details**

* Last Name
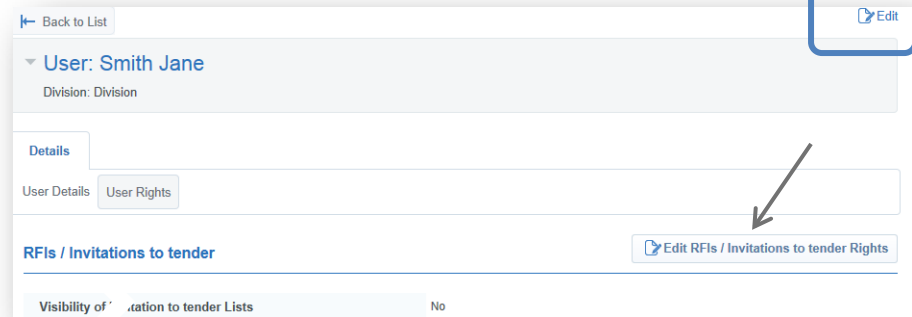
* First Name

User Tag for Codes

* Email

* Telephone Number

The Mobile phone number must start with '+' and contain digits from 0 to 9
(min 8 max 15) with no spaces. The first number can not be 0.

The login details (User ID and temporary password) are automatically sent via email to the contact email address

⚠ If you are authorized to create User accounts, you will be able to view and manage User Rights. Click on *View User Rights*

New User

⚙ View User Rights

Smith Jane has been registered as a new User. The login details have been sent via email to the following email address: angelique.vallin@oecd.org
ⓘ The new User account does not have any Role associated to it. Please review the User Rights of the account in order to grant access to Objects. The account currently has no access to Objects by default.

➢ Click on *Edit* on top of the page or on the *Edit buttons* of each sections to manage rights on Invitations to tender

⬅ Back to List   Edit

▾ User: Smith Jane
   Division: Division

Details

User Details | User Rights

RFIs / Invitations to tender   Edit RFIs / Invitations to tender Rights

Visibility of Invitation to tender Lists   No

➢ If you select **Yes**, the rights will be granted, if you select **Yes if I'm added to the User Rights in the Objet**, this specific user will be able to access specific Invitations to tender only

* Visibility of Invitation to tender Lists   No
                                                     Yes, if I'm added to the User Rights list in the Object
   Yes

* Access Invitation to tender Details

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Manage Contact Users

Select the user right "Contact visible to Buyer" to enable OECD buyers to see the contact and to enable his selection when publishing opportunities.

User Rights on the Portal will grant access to objects and data. It will define what the user will be authorized to see and/or edit on the Portal. By default, the new User does not have any role defined on the Portal. You have to review the user rights in order to grant him/her access to Invitations to tender.
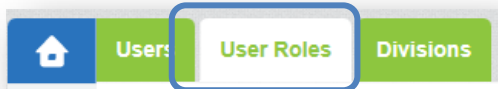

➢ Access the **User Roles** tab (from Menu **User Management**) to manage users and associated roles within your organisation. You can create and/or update specific Roles that can be attached to users.

➢ Click on **Create** to create a Role, select the rights assigned to this Role and click on **Save**.

➢All the specifications of the Role will be automatically assigned to the user when selecting it in the User Account Details

➢ It is also possible to assign specific rights to users, from the **User Rights** of the **Users** tab
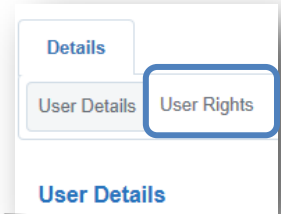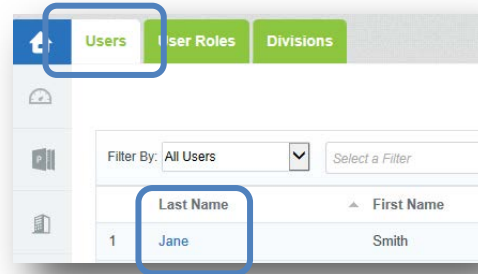
Reminder: User accounts can be updated from the **Users** tab by clicking on the Contact Last Name:
- To update account details ➔ Select **Users Detail** tab
- To update rights ➔ Select **User Rights** tab

2/ HOW TO ANSWER ONLINE INVITATIONS TO TENDER ON THE ESOURCING PORTAL

Access on-line Invitations to tender

If you are invited to respond to an Invitation to Tender, you will receive an email asking you to connect to the OECD eSourcing Portal: https://oecd.bravosolution.com

➢ Your dedicated Invitations to Tenders are available directly from the Main Page of the Portal, under section **My invitations to tender with pending responses**, with the corresponding status.

➢ Click on the Invitation to tender title to open the object.

Invitations to Tenders open to all bidders are accessible under section **RFx Open to All Bidders** available from the Dashboard of the Main Page. To display the details of an open invitation to tender (if you are not directly invited to answer), you'll need to click on *Express Interest*.

You can click on *Decide Later* if you want to consult the object at a later stage.

➢ You can also access all available Invitations to tender from the **Main Menus** on the left
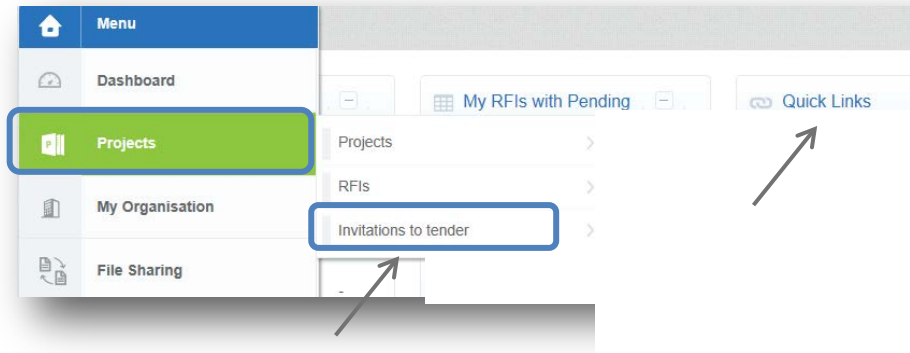
The Quick Links also enable you to access your favorite menus with one click (e.g. My Invitations to Tender)
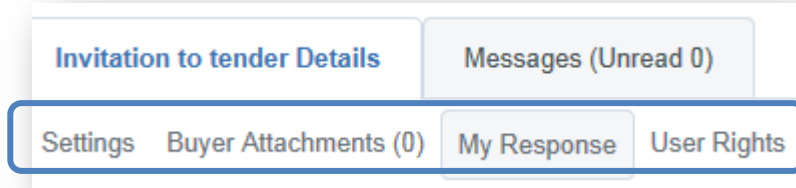
➢ Click on **Projects** then **Invitations to tender** to search and access all your (past and current) invitations to tenders, from both Tabs **My Invitations to tender** or **Invitations to ten open to all suppliers**

Consult and acknowledge receipt of Invitations to tender

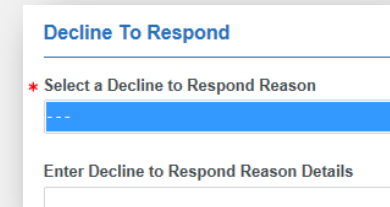➢ Click on the Invitation to tender title to open the **Invitation to Tender Details** tab

➢ Access the **Settings** section to have an overview of the invitation to tender

➢ Access the **Buyer Attachments** section to display the list of files attached by the buyer within the invitation to tender

➢ Access the **My response** section to acknowledge receipt of the invitation to tender and display all OECD questions and Purchasing requirements of **both** Qualification and Commercial envelops

⚠ **Your Response will be prepared, managed and published under My Response section**

➢ You can click on *Create response* to acknowledge receipt of the invitation to tender and start preparing your answer.

⚠ **Please take into consideration the time needed to fulfill your answer on-line to ensure you comply with the deadline for submitting your bid**

⚠ Please note that:
• If you decline to respond, you will have to fill in a Decline reason and eventually add a comment

• It is still possible to answer the Invitation to tender (before the deadline) if you click on *Undo Decline*
• If you click on *Create Response*, **Information and/or confirmation pop-up messages will guide you throughout the process**

➢ You can access **User Rights** section to add contacts in the team that will be in charge of following-up the Invitation to tender

➢ You can click on *Add* to select a user already declared on the Portal

⚠ **For more details on how to manage users on the Portal, please refer to the User guide:**
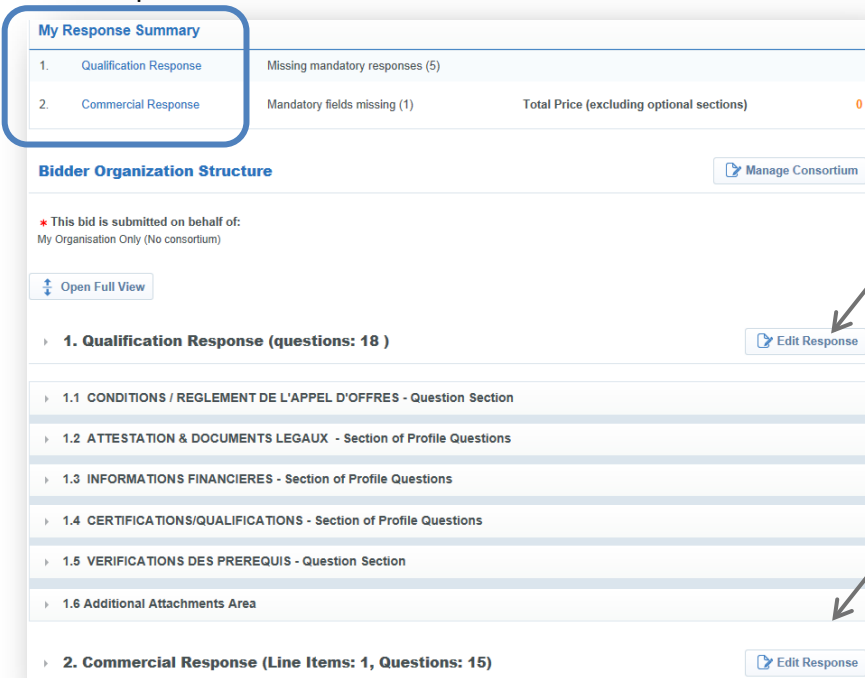**How to update Organisation Profile and Data**

Prepare and Publish Answers

➢ Click on **My Response** section to access both **1/Qualification** and **2/Commercial** Responses envelops
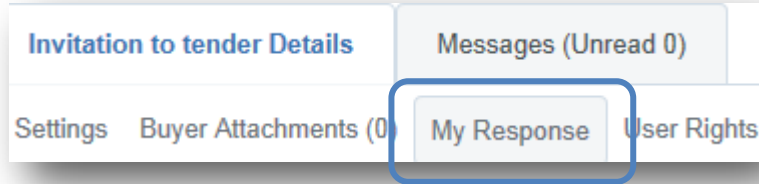
➢ You can click on **Create response** then on **Edit Response** on top of each envelop (qualification and Commercial) to start answering and complete all information

⚠️ Please note that the **Qualification Response** envelop is automatically populated with the information provided under your Profile (please refer to the User guide: How to update Organisation Profile and Data).
It is possible to modify it directly under the Profile section or under the Qualification Response

➢ Click on **Add/view attachments** at the bottom down right to attach additional documents to each section if needed

💡➢ Click on **Validate Response** to check answers and highlight missing mandatory data. A pop-up message will appear if compulsory data are missing
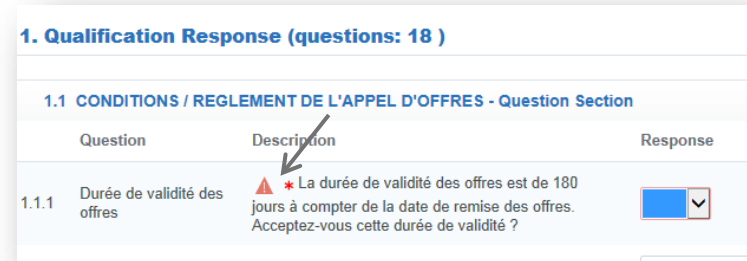

➢ Click on **Refresh** to update the Total Price of the Commercial Response

➢ Click on **Save and Continue** to save data and continue the entry on the same page or click on **Save and Return** once the completion is entirely done to close the window and complete another envelope response if required.

Publish and update Answers

💡 Click on **Export/Import Response** on the top right in order to extract an Excel copy of the questionnaire to be completed offline.
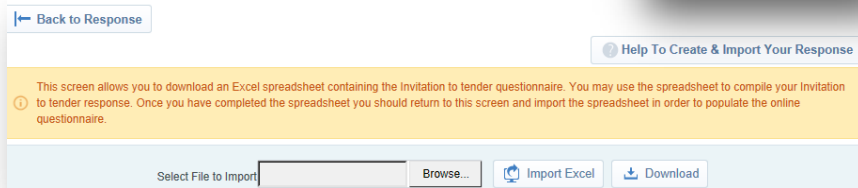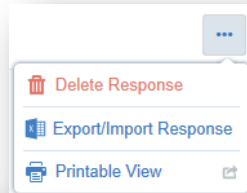
➤ Click on **Download** to export the entire questionnaire
➤ Once completed off line and saved, click on **Import Excel** to upload the spreadsheet. All answers will be automatically populated within the online questionnaire
➤ Then click on **Save Changes** to update the information

⚠️ Please note that all mandatory fields* will be compulsory to publish your answer

➤ After you make sure that you have reviewed your response for completeness, including attachments :
➤ Click on **Submit Response**

📧 A confirmation pop-up appears and an automatic notification is sent (to you and the OECD)

⚠️ **Please take into consideration the time needed to fulfill your answer on-line to ensure you comply with the deadline for submitting your bid**

💡 After Publication, it is still possible to modify your answer until the closing date of the Invitation to Tender

➤ Under the **My Response** tab, you can open both envelops and modify/update all the information needed Or

➤ You can click on **Edit Response** on top of each envelop

➤Click on **Keep changes** when it is done

➤ Click on **Submit changes** to send the updated answer to the buyer in charge of the Invitation to tender

➤ If needed, you can click on **Delete response** to delete an answer. A notification will be sent to the buyer to inform him 📧

💡 **Following evaluation of your response, if so, you will be notified by email in case you are requested to submit a revised bid. In this occasion, the process to publish a new answer remains as described above.**

Consult Messages

All Communication regarding Invitations to tender shall be made through the **Messages** section under each Invitation to tender

Invitation to tender Details   Messages (Unread 0)

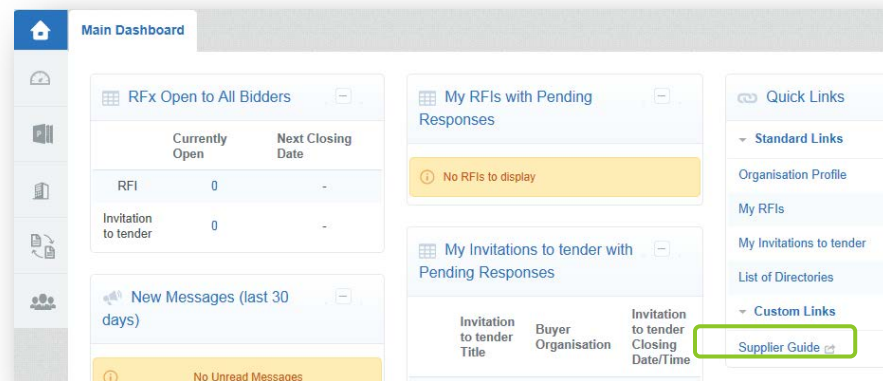Create Message   Received Messages   Sent Messages   Draft Messages
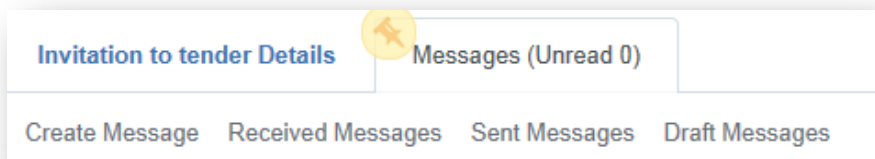
➢ You will be able to access all received/sent messages from/to the buyer in charge of the Invitation to tender via this **Messages** section

You will be notified in your mailbox about all new messages posted on the Portal

➢ Please click on the above link **Supplier Guide** to know how to manage your profile

➢ For information on your access to the OECD eSourcing Portal and use, please contact the service:

Tel. 0033 146 095 672
oecd@bravosolution.com

➢ For information on purchasing procedures, please use the Messages section available in the Invitation to tender to contact the Buyer in charge at the OECD