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eTENDERING Portal

Respondents Manual

Open Windows Australia Pty Ltd

ABN 64 007 086 348

635 Glenferrie Road, Hawthorn VIC 3122, Australia

ph: +61 3 9819 5088

fax: +61 3 9819 5151

web: www.openwindows.com.au

DOCUMENT CONTROL

Document Version

The purpose of this section is to capture all changes made to the content of document.

Version	Date	Updates / Changes	Author / Reviewer
0.1	18 Dec 2014	Initial Draft Created	Melisa Perkins
0.2	23 Apr 2015	Updated for Belmont City Council	Lisa Wieczoreck

Terms and Definitions

Glossary containing the meaning of all names, acronyms, and abbreviations used within this document.

Term/Acronym	Definition
Access Code	The unique code issued to an invited Respondent that will grant them access to the RFx within the eTENDERING Portal. Access Codes are only provided when the tender is an 'Invited Only' tender.
Buyer	Internal staff member responsible for managing the RFx during the tender open and/or closed period
Child	A preliminary or contract record that is a sibling of another preliminary or contract record. E.g. A panel contract may contain 3 suppliers who may all have the same contract numbers, separated with a suffix number – CON123-A, CON123-B.
Closing Date	The date and time at which an RFx will be closed and Submissions can no longer be uploaded via the online eTENDERING Portal.
Contract Record	A Contract record within the CONTRACTS allows the user to record contractual data. E.g. Key Dates, Insurances, Obligations, KPIs (Key Performance Indicators) Risk Assessments and documents.
Dashboard	The Dashboard is the first screen the user will be directed to once they log into Open Windows CONTRACTS. It is made up of widgets, modules and a message bar. The dashboard can always be accessed by clicking on the Open Windows logo.
eTENDERING Portal	The online portal in which RFxs are advertised and where Submissions are lodged electronically. The eTENDERING Portal supports the tendering process on the web, Respondents can perform the following on the eTENDERING Portal:

	• Receive notifications, clarifications and addendums regarding the RFx. • Download RFx Documents online. • Upload Submissions. • Submit queries and receive clarifications online.
Opening Date	The date and time in which an RFx is open and accessible via the eTENDERING Portal.
Party	A supplier or Vendor who may participate in an RFx or is engaged in a contract
Preliminary Record	A pre-contract record which allows the user to record activities such as Scope, Risk Assessment, Tender Activities and Evaluation. A preliminary record is created via the Preliminaries Module in Open Windows Contracts and subsequent to a tender activity is converted to a Contract Record.
Revised Closing Date	The effective and revised Closing Date as it may be amended from time to time.
RFx	RFx is the collective term for Requests for Tender/ Proposal/ Quotation/ Information.
Respondent	Party/ Vendor/ Supplier who participates in an RFx activity.
Submission	A written offer submitted by the Respondent to an RFx via the eTENDERING Portal.
Unlocker	Internal Staff member responsible for unlocking the RFX on the eTENDERING Portal and importing RFx Submissions into Contracts.

Document References

All documents referenced and / or used to assist the creation of this document.

| Document	Author(s)	Date and Version
SOURCING Training Guide	Melisa Perkins	0.4 24/10/2013
CONTRACTS + MANAGEMENT Training Guide	Melisa Perkins	0.4 27/11/2013

Contents

1   Objectives

This Instruction Book will assist you in using the eTENDERING Portal to view and lodge electronic Submissions to RFxs. This document covers the following functions:

- Registering and logging on as a Respondent.

- Viewing RFx details

- Register/deregister your interest in an RFx

- Download RFx Documentation

- lodge and modify a Submission to an RFx

- View RFx communications and submit queries via the eTENDERING Portal

- Contacting a Contact during the RFx period.

- Viewing RFx updates during the RFx Period.

- Managing your account details (including resetting your password).

![open windows logo]

2 The eTENDERING Portal Desktop

The eTENDERING Portal supports procurement processes by providing a secure, web based solution in which respondents can view upcoming and current RFx's and lodge responses electronically.
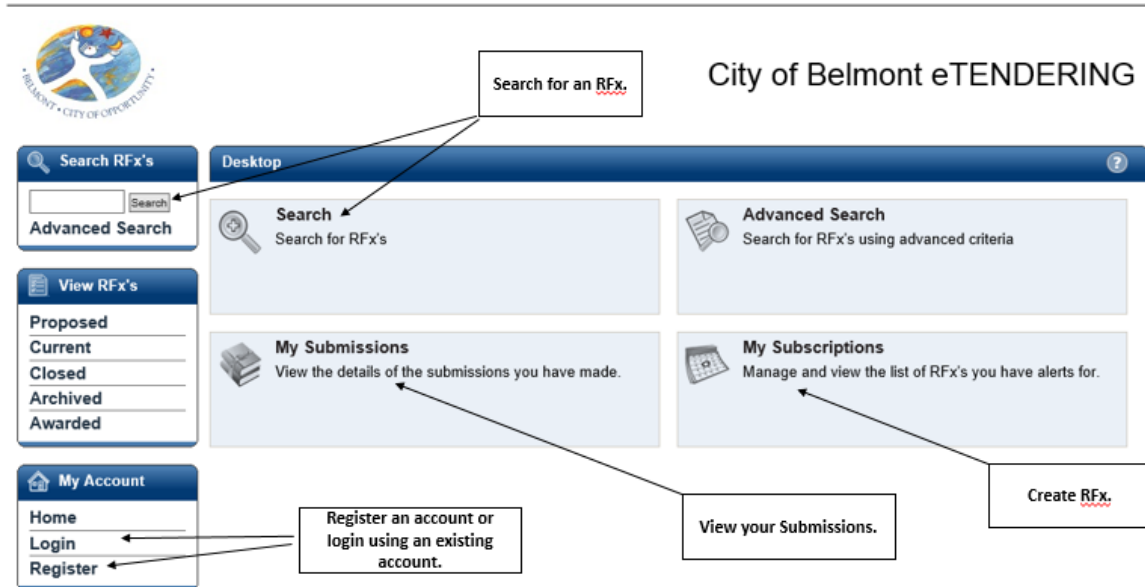
2.1 How to locate an RFx

There are 4 methods you can use to locate an RFx within the eTENDERING Portal.

1. **RFX Search**:
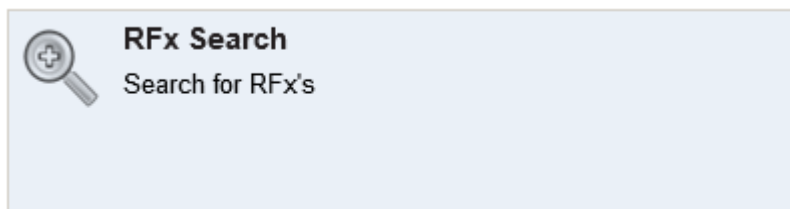
   Click on the **Search** widget to search across all current and expired RFX's within the system (both public and those you have been invited to tender on). Use the following fields to perform you search:

   a. **Number:** Search using part or all of the RFx number

   b. **Title:** Seach using part or all of the RFx title.

   c. **Category:** Search by selecting the category of the RFx.

   d. **Preliminary Stage:** Search by using the stage the RFx is likely to be published under.
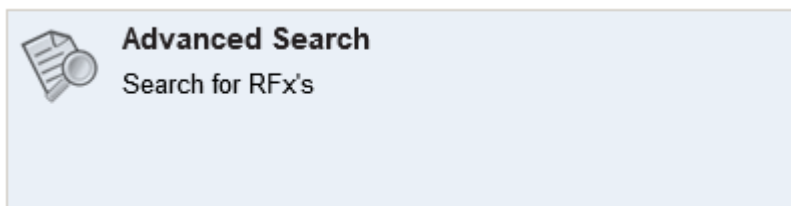
2. **Advanced Search:**

Click on the **Advanced Search** to view access a set of more detailed search criteria. Use the following fields to peform a stricter search;

    a. **Number:** Search using part or all of the RFx number

    b. **Title:** Seach using part or all of the RFx title.

    c. **Description:** Search using key words contained in the RFx description.

    d. **Preliminary Stage:** Search by using the stage the RFx is likely to be published under.

    e. **Category:** Search by selecting the category of the RFx.

    f. **Location:** Seach by selecting the location of the RFx.

    g. **Closing Date Range:** Search by entering the date range you belive the RFx is due to close between.

3. **View RFx's:**

Located on the left hand menu is a widget called View RFx's. Here you will find links that will allow you to locate the following RFX's;

    a. **Proposed:** Displays proposed 'read only' RFx's, you cannot lodge submissions to any RFx's advertised within this area.

   b. **Current:** All current public RFxs. These RFx's are currently accepting Submissions.

c. **Closed:** All closed public RFxs and all RFxs to which you were previously invited and have past their Closing Date. These RFx's are no longer receiving Submissions. All RFx's will stay in a 'closed; state for 90 days before moving to the archived folder.

d. **Archived:** RFX's will be visible within this folder for Thirty (30) days after which the records will be removed from the eTENDERING Portal.

e. **Awarded:** Displays information about the awarded RFx. Please note the decision to publish this information is at the discretion of the organisation.

4. **Seach RFX's:**
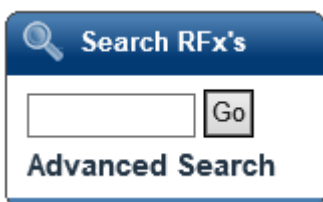
This widget provides a shortcut to performing the following searches;

a. **RFx Search:** Enter the RFx number and select **Go.**
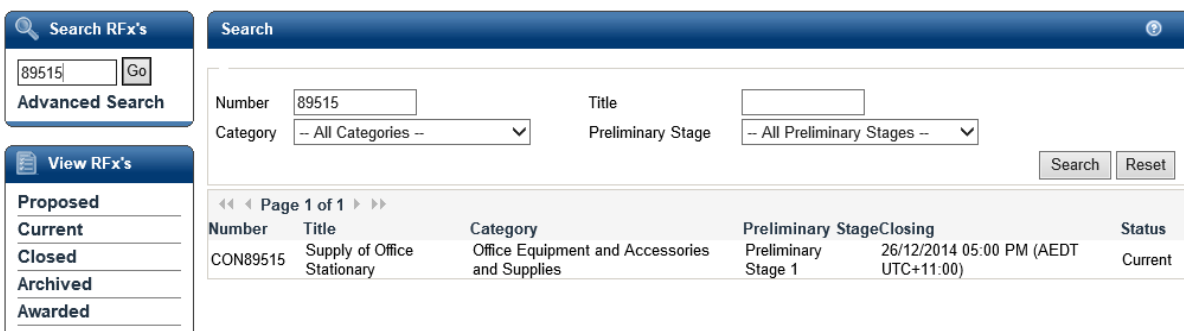
b. **Advanced Search:** Click the **Advanced Search** to be directed to the criteria screen shown at point 2.
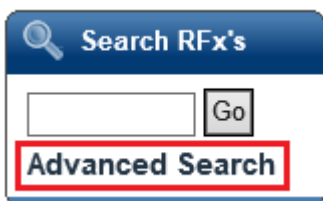
2.2 Locating an Invited Only RFx

An invited only RFx is not visible to the public and only be responded to by those suppliers who have been invited to respond. If you are invited to respond to an RFx you will receive an email with an **Access Code** similar to the following.

Dear Sam Supplier,

RFx Details

Request for Tender Number: RFP24
Request for Tender Title: Engineering Services
Request for Tender Category: Building & Construction
Request for Tender Opening Date: 23/12/2014 11:00 AM (AEDT UTC+11:00)
Request for Tender Closing Date: 09/01/2015 05:00 PM (AEDT UTC+11:00)
Request for Tender Location: Melbourne
Request for Tender Description: Provide consulting services on council projects.

All times listed above are displayed in Canberra, Melbourne, Sydney time

Accessing the RFx

If you are a first time user of eTendering please click here and follow the registration process detailed below to access the Tender. Already registered users can login to the eTendering Portal and enter your Access Code, provided below, to access the RFx.
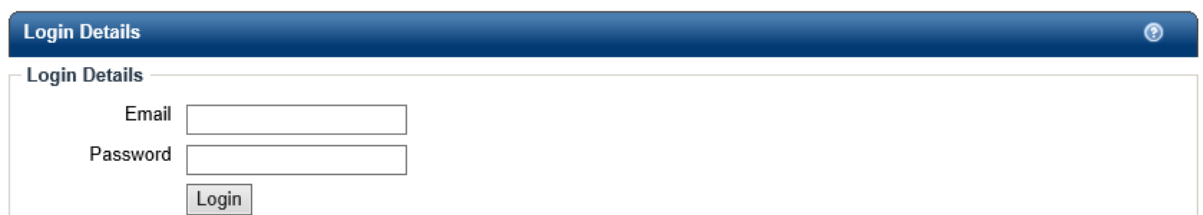
Access code "quoodi25" (without quotes).

Please do not reply to this email. Any enquiries related to this tender should be directed to the contact person shown on the information for the tender.

Buyer, Bob
Ph: 00 9999 9999
Email: bob.buyer@supplier.com.au

To view the RFx use the following instructions

1. Log into the eTENDERING Portal.

Login Details

Login Details

Email _____

Password _____

[Login]

You will need to register to make submission or to access additional functionality like alerts. Click here to register

If you have forgotten your password click here.

2. Select the **Invited** View. Enter the **Access Code** in the **RFx Invited Code** field. Select **Get RFx.**

3. The **RFx** will now display in the list.

This RFx is greyed out as the Opening Date has not yet passed

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3 Registering on the eTENDERING Portal

You are required to register on the eTENDERING Portal to lodge submissions and access invited tenders. Use the following instructions to register, you will only need to do this if you have not previously registered and/or do not have an eTENDERING Portal account.

1. From the **My Account** widget select **Register** link.

2. Complete your details on the **Respondent Registration** page. Note all fields marked with * are mandatory.

3. Review the **Conditions of Use** and select the checkbox. Select **Submit** to complete the registration.

4. A message will appear indicating you have successfully registered and notify you that an email has been sent to you with instructions on how to complete the registration process.

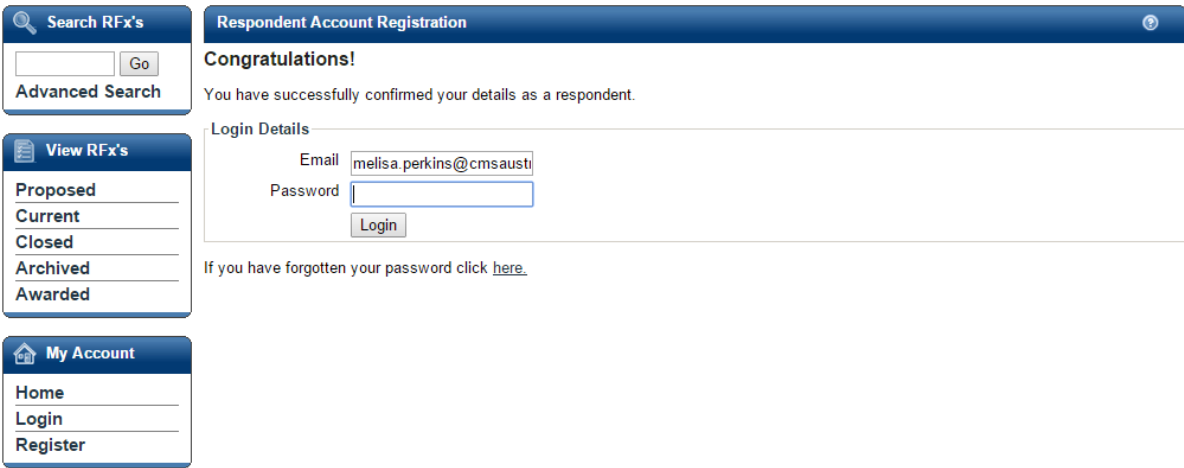5. Log into your email account, you will see an email similar to the following from the eTENDERING Portal. Select the verification link to complete the process.
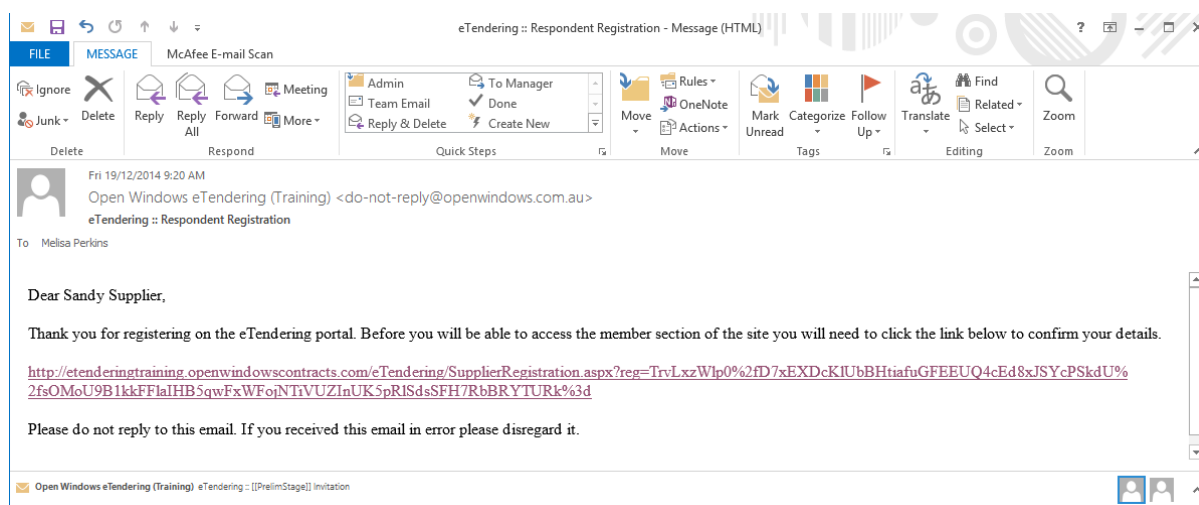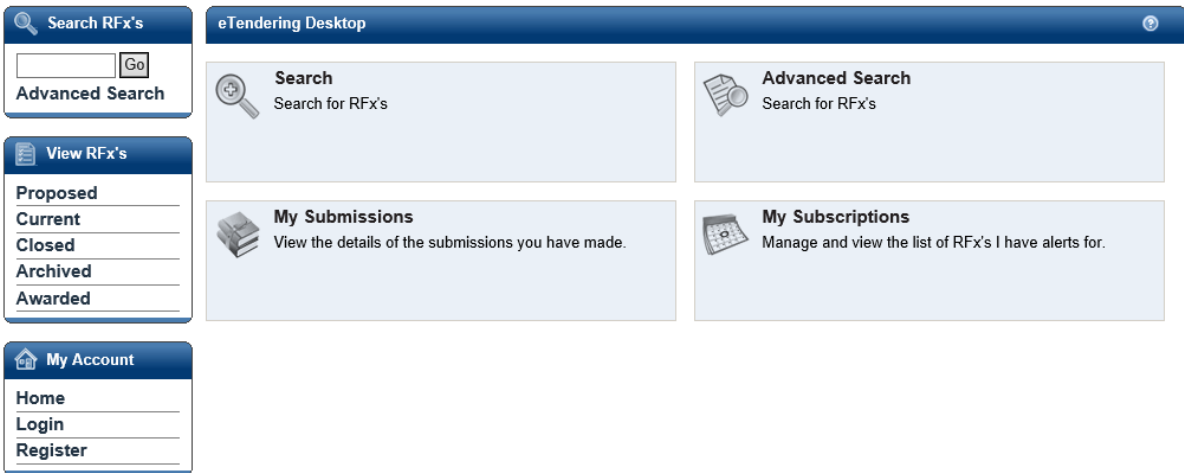

6. The link will open the eTENDERING Portal to the **Respondent Account Registration** page. Enter your password to log into your account.

open windows

Search RFx's

[ ] [Go]
Advanced Search

View RFx's
Proposed
Current
Closed
Archived
Awarded

My Account
Home
Login
Register

Respondent Account Registration   ⑦

Congratulations!
You have successfully confirmed your details as a respondent.

Login Details
Email melisa.perkins@cmsaustr
Password [ ]
[Login]

If you have forgotten your password click here.

7. Once logged in you will be directed to the **eTENDERING Portal Desktop.**

Search RFx's

[ ] [Go]
Advanced Search

View RFx's
Proposed
Current
Closed
Archived
Awarded

My Account
Home
Login
Register

eTendering Desktop   ⑦

Search
Search for RFx's

Advanced Search
Search for RFx's

My Submissions
View the details of the submissions you have made.

My Subscriptions
Manage and view the list of RFx's I have alerts for.

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4 Logging into the eTENDERING Portal

To access the eTENDERING Portal enter the following URL into a web browser;

https://belmontetender.openwindowscontracts.com/

To log onto the eTENDERING Portal select the **Login** link.

2. Enter your registered email address and password on the Login screen. If you have forgotten your password, click on the here hyperlink. See Section 7 'Resetting your Password'.

Once you are successfully logged in to the eTENDERING Portal, you will be presented with your desktop where you can now search for your RFx, view all your current and closed RFxs, and view your Submissions history.

5 Navigating within an RFx

Once you have located an RFx you are interested in select the RFx to more detail about.

RFx: Before the Opening Date

If your RFx details are greyed out (read only mode) as per the image below, your RFx has not opened and is not available for you to view until the Opening Date. In order to access your RFx you must return on or after the RFx Opening Date.

This RFx is greyed out as the Opening Date is in the future.

RFx: After the Opening Date

If your RFx details are not greyed out, the RFx has reached the Opening Date and is available for viewing as shown below:

Click anywhere on the RFx record to be directed to the RFx Details screen, where you can navigate through the different tabs of information relating to the RFx. These tabs are further explained in the next sections.

5.1 The Details Tab

The **Details** tab shows all the key details about the RFx.

What do the fields mean?

1. **Number:** RFx reference number.

2. **Title:** Title of the RFx.

3. **Description:** A summary description of the RFx.

4. **Preliminary Stage:** The market approach used for your RFx, e.g. Expression of Interest, Request for Proposal, Request for Services etc.

5. **Category:** The category or classification for the project/good/service.

6. **Location:** The RFx Location or Site for which the project works/good/service is required.

7. **Opening Date:** The date and time at which an RFx is open, accessible and available for Submissions.

8. **Closing Date:** The date and time at which an RFx will be closed and electronic lodgment of Submissions thereafter is strictly unavailable.

9. **Revised Closing Date:** If the Closing Date of the RFx is amended at any time during the RFx Period, the Revised Closing Date field will appear under the Closing Date field in this Details tab. The new Closing Date will be communicated to all Respondents via email Notice.

10. **Last Updated:** The last time a change was made to the RFx. Status: The current status of the RFx: Current or Closed.

5.2 The Documents Tab

The Documents tab lists all RFx Documents issued with the RFx. In order to access the **Download all documents** button you will first need to **Register as a Respondent.**

5.2.1 Registering as a Respondent / Downloading RFx documents

In order to view RFx documents you will be required to login using your eTENDERING account and register for the RFx, if you do not have an eTENDERING Portal account please see section 3. Registering on the eTENDERING Portal. To register for an RFx and download the RFx documents;

1. Ensure that you are on the **Documents** tab of the RFx.

2. Click on the **Register as a Respondent** button.
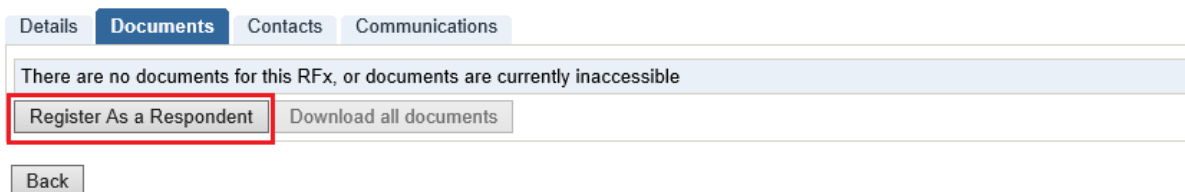
3. If you are not logged into the eTENDERING Portal you will be required to enter your account details at this point.

4. Select the **Download all documents** button, this will only be available once you have registered as a respondent to the RFx.

5.2.2 Unregistering as a Respondent

At any time during the RFx Period you are able to unregister your intent to participate in the RFx.

1. Navigate to the Documents tab of the RFx and click on the **Unregister as a Respondent button.**

2. Click **Confirm** to acknowledge that you no longer wish to receive communications regarding the RFx.

3. Once you have unregistered you will notice that your access to the RFx has reverted back to Read Only as it was prior to your registration. This means you are no longer able to download RFx Documents (including any addendums), send communications or lodge a Submission.

5.3   The Contacts Tab

The Contacts tab details the contact information of the City of Belmont Contacts that have been nominated for the RFx. Please note that the Contacts may differ for each RFx.

5.4   The Communications Tab

The Communications tab acts as a repository for all RFx communications and queries that have been submitted to the City of Belmont Contact since the RFx Opening Date. Communications.

Note: Your use of the Communications tab will be restricted until you have registered as a respondent for the RFx.

5.4.1   Submitting a Query via the Communications Tab

You may submit a query or communication for RFx's at any time while the RFx is open and also once it has been closed. The City of Belmont contact will receive an alert to notify them of the query once it has been submitted. Follow the steps below to send a query to the RFx Contact:

1. Navigate to the Communications tab of your RFx.

2. Enter the detail of your query in the Query text box.

3. Attach any relevant documentation using the **Browse** button next to the **Attachment** field to locate the document.

   Note: You are only able to attach one (1) document per query. If you would like to attach more than 1 document, please raise a new query item for each document.

4. To remove an attachment simply click on the **Remove** button.

5. Click Send **Query** to lodge the query.

6. The top section of the Communications screen lists all communications for the RFx including any queries you have submitted. Upon successfully submitting a query your communication item will appear in this log.

7. Once the RFx contact has responded to your query you will receive an email with the details of their response. You will also be able to view the details of the response within the Communications tab.

6 Responding to an RFx

In order to respond to an RFx and lodge a submission you must first ensure that you;

- Registered as a Respondent

- Downloaded the RFx documents

6.1 Lodging a Submission

The following steps will guide you through lodging a Submission.

NOTE: There are limits on the acceptable file types, file size and number of documents per Submission, as explained below.

1. Login to the RFx via the eTENDERING Portal or if you are already logged in, City of Belmont logo at the top of your screen to refresh your screen and go back to your desktop.
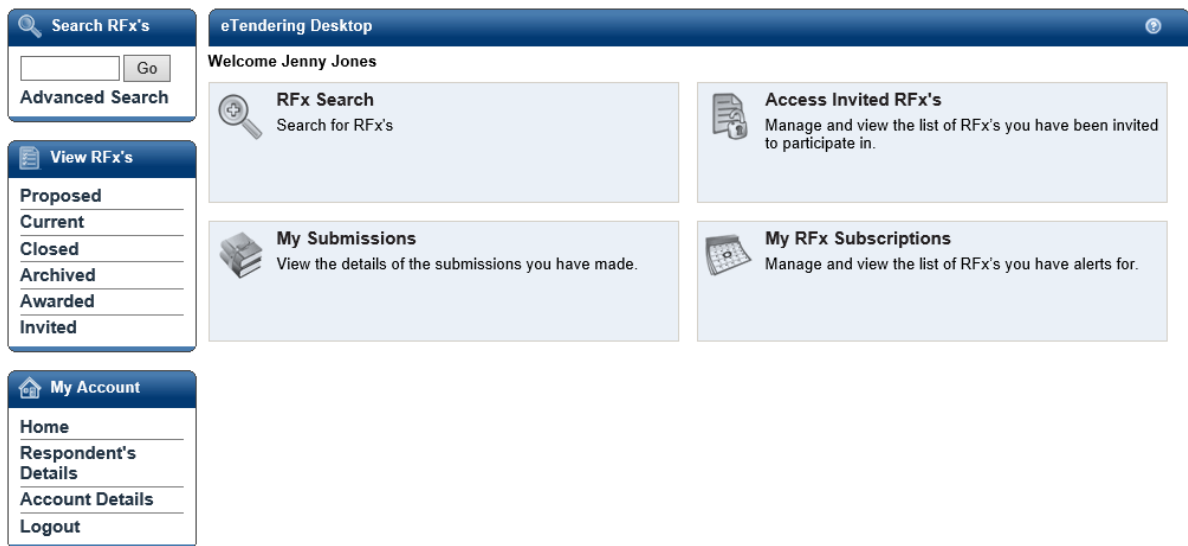
2. Under the **View RFx's** left hand menu, click on **Current** to locate your RFx.

3. Select the RFx for which you would like to lodge a submission.

4. You will be directed to the **Details** tab of the RFx. If you do not see the Update or Lodge a New Submission button, you are not registered to participate in the RFx. Please register as a respondent (refer to Section 5.2.1 'Registering as a Respondent').

5. Click on the **Update or Lodge a New Submission** button.

6. You will be directed to the **Update or Lodge a New Submission conditions page**. Click on the **Continue** button to agree with the terms and conditions of the RFx process.


7. You will be navigated to the screen where you are able to upload your Submission. Before you start uploading documents and lodging your Submission, please locate the RFx name and check that you are lodging your Submission against the correct RFx.
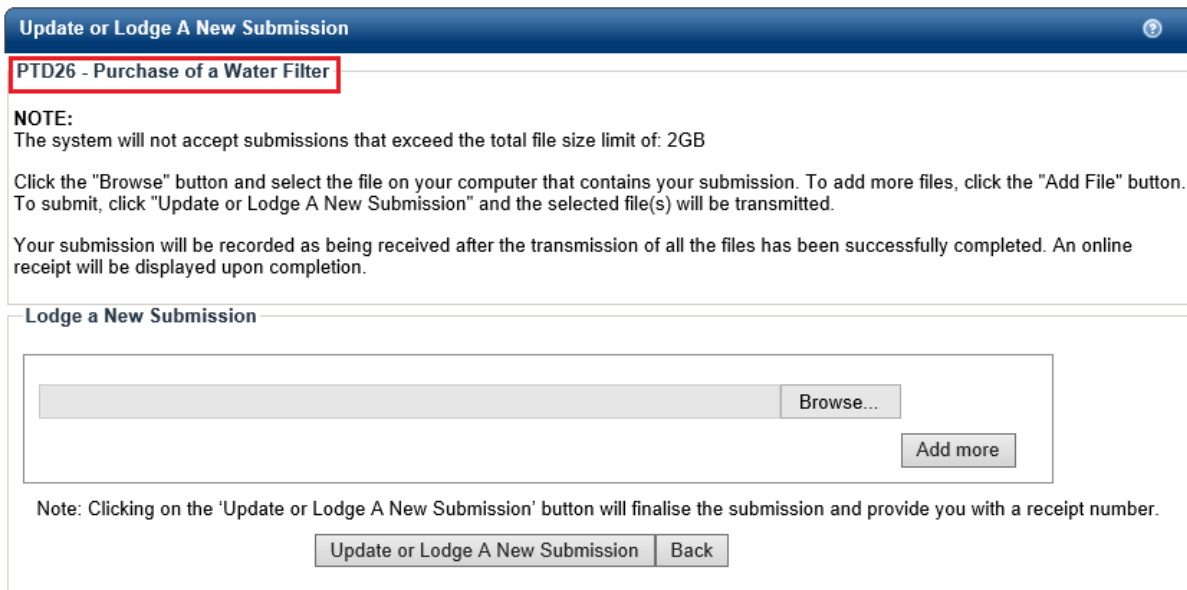
8. To upload a Submission document click on the **Browse** button to locate your document.

9. To upload additional documents click on the **Add File** button and repeat step 8. Repeat this process for all remaining documents, remembering there is a limit of 10 documents per Submission.
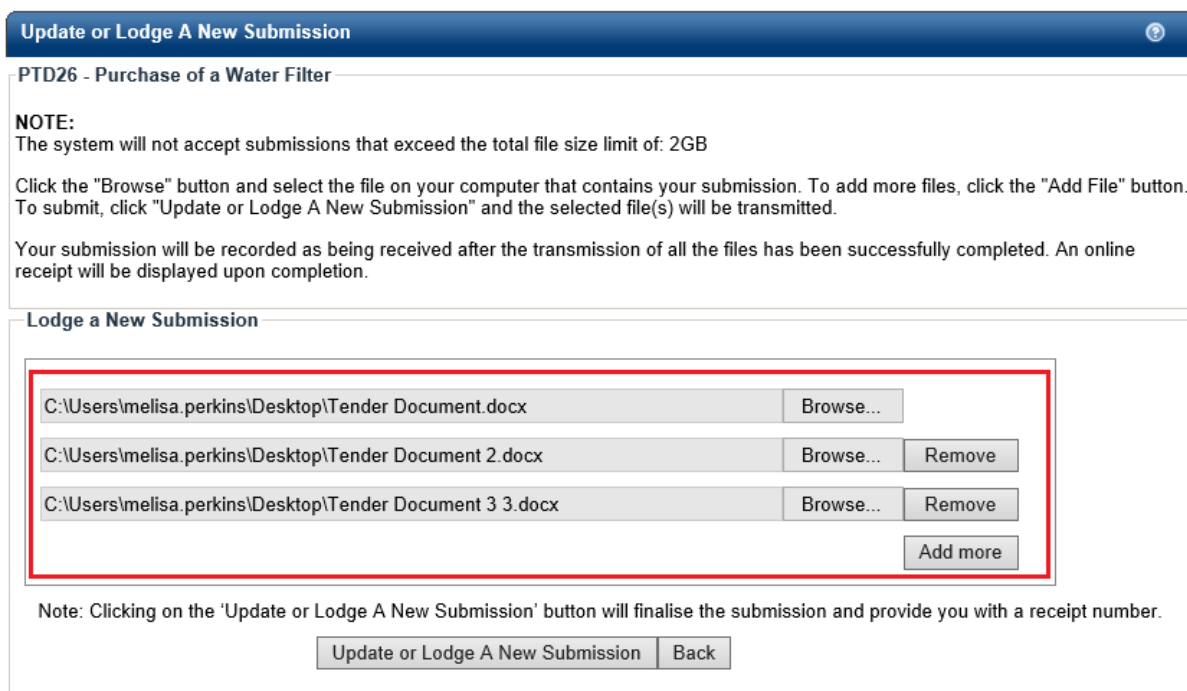
10. If you make a mistake and need to remove a document from your Submission, click on the **Remove** button next to the file you wish to remove.

11. Click on the **Update or Lodge a New Submission button to lodge your Submission**. You may see an **Upload in progress** screen which indicates the Submission is being uploaded.

12. Once your Submission has been successfully lodged, you will be navigated to the Submission Receipt screen. On this screen please:

a. Locate and note your Submission receipt number for future reference; and

b. Check that all your Submission documents have been successfully lodged.

c. You will receive a reference number for each lodged Submission

You will also receive an **eTENDERING: RFx Submission Lodged Notification** email which is a copy of your Submission Receipt.

To retrieve your Submission history against an RFx, return to the **Details** screen of the RFx and click on the **My Submission** button.

6.2   Modifying your Submission

At any time before the Closing Time, you are able to modify your previously lodged Submission(s).

1. Log in to the eTENDERING Portal and navigate to the RFx.

2. On the **Details** screen of the RFx, click on the **Update or Lodge A New Submission** button.

3. Click on the **Continue** button to accept the terms and conditions of the RFx process.

4. You will be navigated to the **Update or Lodge a New Submission** screen. Since you have previously lodged a Submission, the screen will now display **Lodged Documents** and an area to **Lodge a New Submission** as shown below:
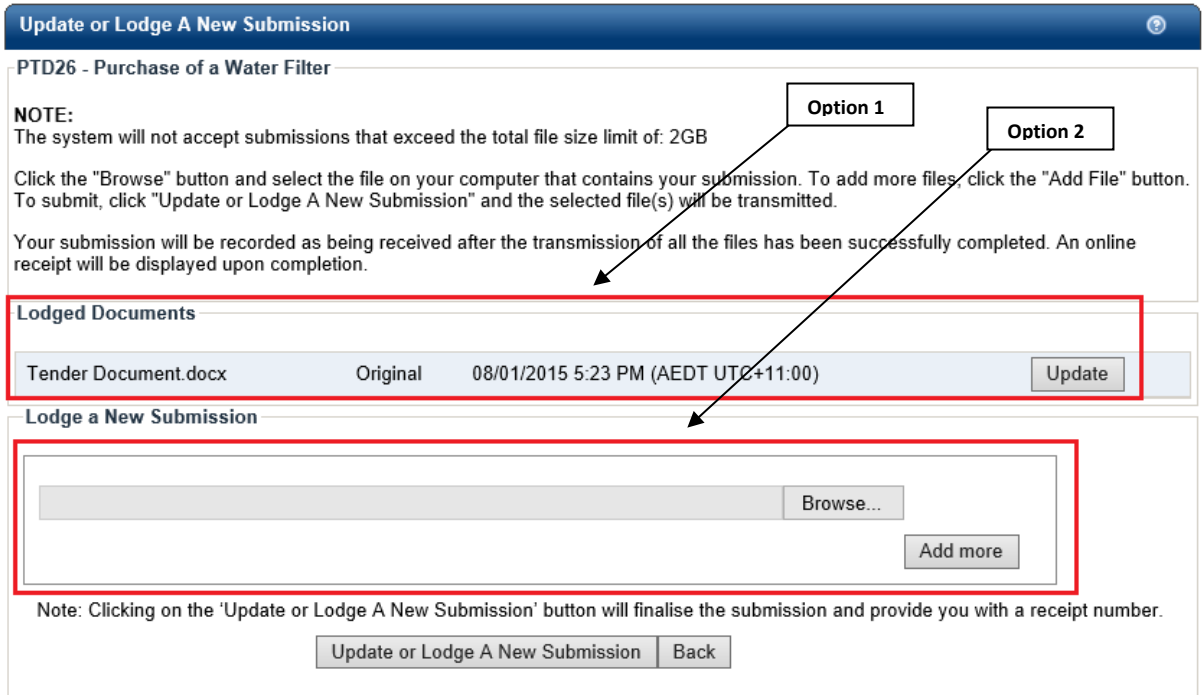
5. You are now ready to make amendments to your Submission(s). There are two (2) options for updating your previously lodged Submission:

Option 1 – Update a previously lodged Submission document

This option allows you to update specific documents that you have lodged as part of a previously lodged Submission.

1. Locate the **Lodged Documents** area on the top half of the **Update or Lodge a New Submission** screen; all your submitted documents will be listed in this area.

2. Click on the **Update** button next to the document that you wish to update. A browse documents pop up will appear under the document record that you are modifying.

3. Click on the **Browse** button and locate your revised/modified document. If you have selected the incorrect document, click on the Remove button and repeat this step.

4. When you have modified all your documents, click on the **Update or Lodge a New Submission** button at the bottom of the screen to finalise your modification.

5. You will receive another **Submission Receipt**. Please note your Submission receipt number for future reference and check your modified document(s) has been successfully uploaded. Your Submission Receipt will also be emailed to you.

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Document Set ID: 4762757
Version: 1, Version Date: 27/08/2020

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Option 2 – Submit a new Submission:

This option allows you to lodge a new Submission.

1. Locate the **Lodge a New Submission** area at the bottom half of the Update or Lodge a New Submission screen.

2. Click on the **Browse** button and locate the document you wish to lodge. If you have selected the incorrect document, click on the Remove button and repeat this step.

3. When you have attached all your documents, click on the **Update or Lodge a New Submission** button at the bottom of the screen to finalise your submission.

4. You will receive another Submission Receipt. Please note your Submission receipt number for future reference and check your modified document(s) has been successfully uploaded. Your Submission Receipt will also be emailed to you.

6.3   Viewing your Submission History

There are 2 methods of viewing your Submission history depending on whether the RFx is still open or has closed.

Submission History - RFx Open

When the RFx is still open, your Submission history will appear on your **Update or Lodge a New Submission** screen.

1. Log in to the eTENDERING Portal and navigate to the RFx.

2. On the **Details** screen of the RFx click on the **My Submission** button to view a summary of the submission details.

My Submissions

Number	Title	Closing Date/Time	Status	Time of Submission	Receipt Number	View Submission Files
PTD26	Purchase of a Water Filter	16/01/2015 05:00 PM (AEDT UTC+11:00)	Current	08/01/2015 05:23 PM (AEDT UTC+11:00)	7	

Back

Submission History - RFx Closed

When the RFx has closed, follow the below steps to view your Submission history.

1. Log in to the eTENDERING Portal using your account details.

2. On the eTENDERING Desktop locate and click on the My Submissions widget.

eTendering Desktop

Welcome Jenny Jones

RFx Search
Search for RFx's

Access Invited RFx's
Manage and view the list of RFx's you have been invited to participate in.

My Submissions
View the details of the submissions you have made.

My RFx Subscriptions
Manage and view the list of RFx's you have alerts for.

3. You will be navigated to the **My Submissions** screen which displays your entire submission history.

   Note: There will be a Submission record for each Submission receipt. Therefore, if you have lodged more than one Submission for a particular RFx or you have modified a Submission, you will have a Submission record for each Submission Receipt.

4. Click on the **View Submission Files** icon next to the RFx record for which you wish to view the Submission document log.

5. The **Submission Document** log will be presented below the Submission History List as highlighted in the following screenshot.

Filename	Length	Uploaded
Tender Document 2.docx	11397 (0.01 MB)	06/01/2015 3:11 PM
Tender Document.docx	11374 (0.01 MB)	06/01/2015 3:11 PM

7   Resetting your Password

City of Belmont does not have access to your account on the eTENDERING Portal, thus we cannot change or reset your password on your behalf. If you have forgotten, or wish to change, your password please refer to the guidelines below.

If you have forgotten your password to the eTENDERING Portal, you are able to obtain a new password using the Forgot Password function.

1. Locate and select **Login** under the **My Account** left hand menu.

2. Locate the 'If you have forgotten your password click here' information below the **Login Details** area. Click on the here hyperlink.

3. You will be navigated to the **Forgot your password** screen where you are required to enter your name and email address for confirmation purposes. Click **Send password information**.

Note: Your name and email address must be the same as you used to initially register on the eTENDERING Portal.

4. You will receive an on-screen notification, notifying you that your new password request has been successful. Your new password will be contained in an **eTENDERING: New Password Notification email**.

8 Changing your Password

You may change your password at any time by following the steps outlined below.

1. Log into the eTENDERING Portal. If you do not remember your password please refer to Section 7 'Resetting your Password' to receive a temporary password.

2. Navigate to **the My Account** left hand menu and click on **Account Details**.

3. On this screen you will be required to enter in your old password into the Old Password* field.

4. Enter a new password and confirm this password in the New Password* and Password Confirmation* fields. Your new password must be at least seven (7) characters long and contain letters and numbers. The password is not case sensitive nor do you require a space between letters and numbers.

5. Click the **Submit** button to reset your password. Your password has been reset when you receive a successful on-screen message.

9 Amending Respondent Details

You may amend your account details at any time you are logged in to the eTENDERING Portal.

1. Navigate to the **My Account** left hand menu and click on **Respondent's Details**.
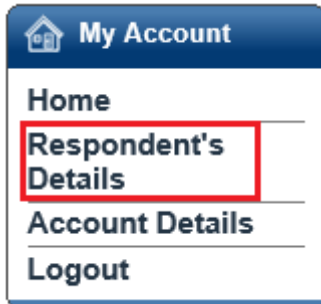
2. You will be navigated to the **My Details** screen where you can view your registered details. Modify your Contact, Organisation or Address details as required. This will ensure has your correct details at all times.

3. Click on **Submit** to save your changes

4. Your changes have been saved once you receive a successful on-screen message.