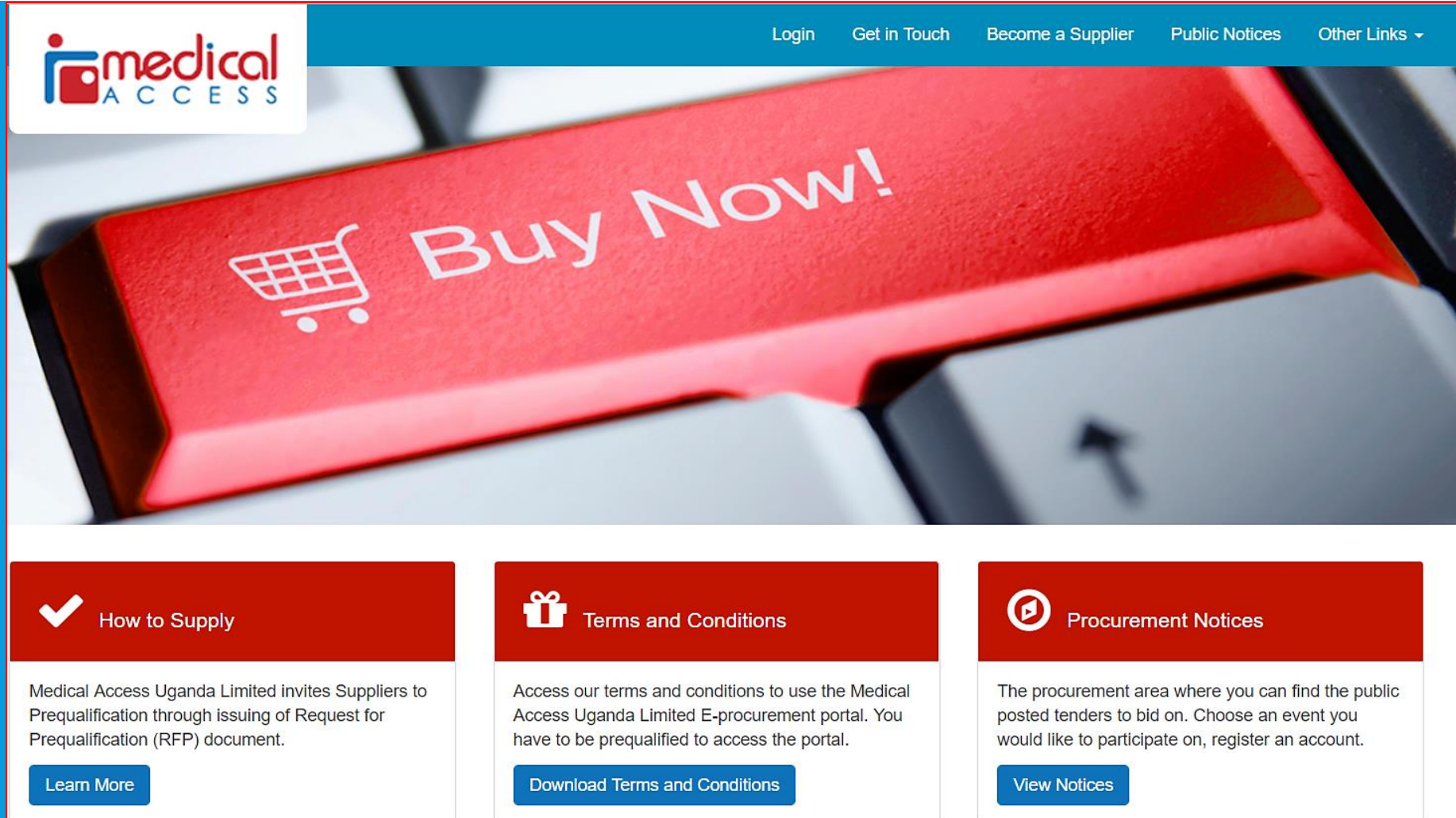


Medical Access Uganda Limited (MAUL)

e-Procurement User Guide – For PA Team



The screenshot shows the homepage of the Medical Access Uganda Limited e-Procurement portal. At the top left is the logo for 'medical ACCESS'. The top right navigation bar includes links for 'Login', 'Get in Touch', 'Become a Supplier', 'Public Notices', and 'Other Links'. The main banner features a close-up of a red keyboard key with a shopping cart icon and the text 'Buy Now!'. Below the banner are three red boxes with white icons and text, each containing a brief description and a 'Learn More' button.

medical ACCESS

Login Get in Touch Become a Supplier Public Notices Other Links ▾

Buy Now!

✓ How to Supply

Medical Access Uganda Limited invites Suppliers to Prequalification through issuing of Request for Prequalification (RFP) document.

[Learn More](#)

📁 Terms and Conditions

Access our terms and conditions to use the Medical Access Uganda Limited E-procurement portal. You have to be prequalified to access the portal.

[Download Terms and Conditions](#)

📢 Procurement Notices

The procurement area where you can find the public posted tenders to bid on. Choose an event you would like to participate on, register an account.

[View Notices](#)

Document Version Control

Document Control	
Title	e-Procurement User Guide - Procurement Agency (PA) Team
Company	Medical Access Uganda Limited (MAUL)
Abstract	This user manual is intended to give assistance to MAUL end users to help them adapt, gain familiarity, and understand how to work with the MAUL e-Procurement portal.
Authors	MAUL and EIM Solutions
Date Created	Friday, 30 April 2018
Current Version	5.0

Modification history				
Version	Create Date	Submission Date	Authors	Comments
1.0	30/04/2018	03/08/ 2018	MAUL and EIM	Draft version for comments and revision
2.0	05/ 09/2018	18/09/2018	MAUL and EIM	Bids Evaluation processes (Preliminary, Commercial, and Technical)
3.0	01/04/2019	10/06/2019	MAUL and EIM	Financial Evaluation (Award, Cancel, Procure Later, and Negotiate) and Award Contracts
4.0	01/09/2019	08/11/2019	MAUL and EIM	Evaluation Process updates (Negotiation and Due Diligence)
5.0	17/09/2020	22/09/2020	MAUL and EIM	System updates

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 - 7.8 Evaluation Report (Review & Approval)
 - 7.9 Negotiation Process
 - 7.10 Due Diligence Process
- 8.0 Award**
 - 8.1 Award Contracts
 - 8.2 Generate Purchase Orders

Abbreviations

ARV	Antiretroviral
BM	Bid Manager
e-Procurement	Electronic Procurement
ED	Executive Director
FM	Finance Manager
HOD	Head of Department
MAUL	Medical Access Uganda Limited
PA	Procurement Agency
PO	Purchase Order
RFQ	Request For Quotation
SBD	Standard Bidding Document
ToR	Terms of Reference
URL	Uniform Resource Locator

1.0 INTRODUCTION

1.1 What is e-Procurement?

Electronic Procurement (e-Procurement) is the use of internet/ web-based technology to acquire goods and services from suppliers.






1.2 Objectives

This user manual is intended to give assistance to MAUL end users to help them adapt, gain familiarity, and understand how to work with the MAUL e-Procurement system.
End users will be able to raise requisitions, prepare and send out SBDs, receive bids, evaluate bids, and award contracts.



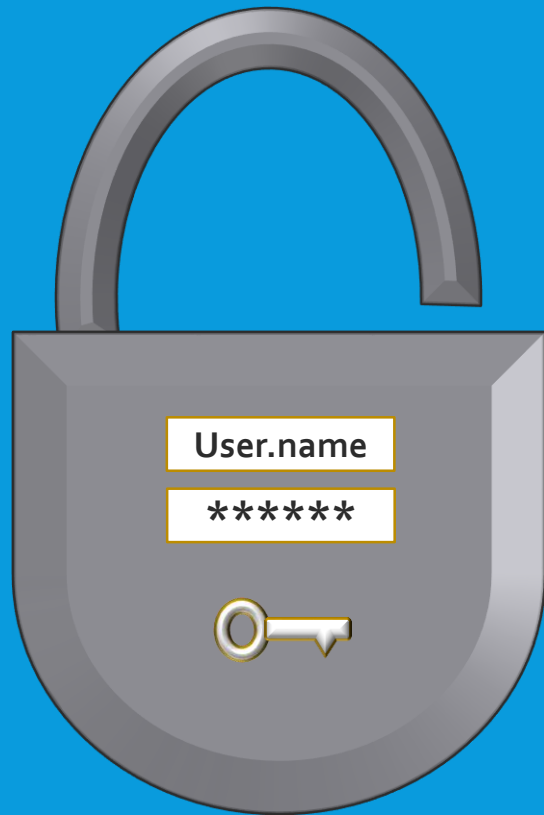
How to Use the Guide

The guide has been divided into various sections to help you use the E-Procurement system optimally. Each section comprises of alpha-numeric steps that are sequential. We would recommend you follow the guide in sequential order as indicated in each section. Below are some of the frequently used conventions/ icons across this user manual

Convention/ Icon	Description
	Important information that must be read carefully
	Tip to advice and help you use the system easily
	Sequential steps and instructions to follow when performing tasks in the system
	Additional information that explains a specific system function or process
	Viewing the system outputs after certain transaction have been executed



2.0 SYSTEM ACCESS



○ This section covers basic access to the e-Procurement system.

○ Before users actively participate and interact with the system, they will be provided with the following via E-mail:

- ✓ A web link/ URL pointing to the e-Procurement portal interface
- ✓ Username – This is the user's email prefix

A user will then be required to click on the web link that will direct them to the portal. The **'forgot your password'** functionality together with the users' username will be used to generate a password



2.1 System URL & Login

Step 2.1 (a) - This is the URL/ Web Address that points to the location of the e-Procurement system.

Secure | <https://procurement.spinprocure.com>



Login

Get in Touch

Become a Supplier

Public Notices

Other Links ▾

Step 2.1 (b) – Click here to Log in to the system





Step 2.1 (c)

Enter your login credentials on the interface provided.

Login Form

Log In →

Home

Forgot your password? →

 MAUL E-procurement System

©2018 All Rights Reserved. Privacy and Terms

- The System Administrator is responsible for creating new e-Procurement users. Your username is your **Email prefix**. For example ... user.name@medicalaccess.co.ug. The username will be **user.name**
- Users will create their own passwords according to password policies.
- If you cannot remember your password, use the '**Forgot your password functionality**' ... you will be notified to change your password via E-mail.



IMPORTANT

After fifteen (15) minutes of inactivity, you will be logged out of the system and will be required to log in again.

When not working with the system, please **LOG OUT**.





e-Procurement

 Notifications ▼

 Catalogue ▼

 Requisitions ▼

 Purchase Orders ▼

 Solicitations Management ▼


 Other Approvals ▼


 Evaluations ▼

 Awards ▼

 Contract Management ▼

 Reports ▼

 After successful login, a user will be able to see the '**Main Navigation Menu**'.

 This Graphical User Interface (GUI) is intended to assist users to access the various procurement functionalities present in the system in an organized way



IMPORTANT

Depending on a user's rights, the main navigation menu will differ from one user to another.



3.0 REQUISITIONS

- This section covers basic navigation of the item master, creation of requisitions, and approval of requisitions.
- All users from various departments will have the authorization to generate requisitions in the system for the major Item categories.
- After a requisition is created, it will go through the three-Step approval process.

The three-step approval process



3.1 Item Master Navigation

Basic Navigation - The four (4) major product categories have been configured in the system. Users are able to view and drill down to the sub-groups and further drill down to the individual items that belong the sub groups.

The screenshot shows a web browser window with the URL <https://procurement.spinprocure.com/procurement/dashboard>. The page title is "e-Procurement". The left sidebar contains a navigation menu with the following items: Notifications, Catalogue, Item Groups, Items, Requisitions, Solicitations Management, Evaluations, Awards, and Contract Management. The "Catalogue" menu item is highlighted with a yellow box, and a red arrow points from a callout box to the "Item Groups" sub-item. The callout box contains the text: "Step 3.1 (a) – Click on the catalogue drop down menu and select 'Item Groups'". The main content area shows a dashboard with a header containing "Help", "All times in East African Time (EAT)", and a user profile for "Ken Shabola" with a notification badge showing "11". Below the header, there are two main sections: "Assigned Requisitions" with a count of 4, and "Shopping Cart /My Requisitions" which includes sub-sections for "Shopping Cart" and "Top 5 Requisitions".

Item Groups

Search Item groups

+ New Group



TIP

New Item Groups can be created here.

Only users with proper rights and authorizations are able to create new Item groups.

#	Sub Group Code	Name	Actions
1		Medical Supplies	View Delete
2	01	ARVs	View Delete
3	02	Ols & STIs	View Delete
4	03	Laboratory Reagents and Consumables	View Delete
5	04	SMC	View Delete
6		Services	View Delete
7		Non Medical Supplies	View Delete
8	03	Vehicles	View Delete
9		Works	View Delete

Step 3.1 (b) - Click the 'View' button to view details of the Medical Supplies Item Group .



Item groups can be edited here.



TIP

Only users with proper rights and authorizations can edit details of an Item Group.

[Edit](#)

Medical Supplies group

Related Item Groups

Name	Description	Actions
ARVs	The ARVs main c	View
Ols & STIs	The Ols and STIs	View
Laboratory Reagents and Consumables	The Laboratory Reagents and Consumables	View
SMC	Safe Male Circumcision	View

Step 3.1 (c) - Click the 'View' to view individual items in the ARVs sub-category.

Group Description

Medical Supplies

The main medical supplies category.

Code
MED

Print Layout : Medical Print Layout



ARVs group

Related Items

Item Code	Item Name	Foreign Name	Unit Price	Unit Of Measure	Group Code	Actions
110001	Abacavir 60mg, Tablets, 30 Tabs		5	Pack	4	View Edit
110002	Abacavir 20Mg/ml, Oral Solution, 240ml		6.83	pack	4	View Edit
110003	Abacavir 300mg, Tablets, 60 Tabs		10.99	pack	4	View Edit

Step 3.1 (d) - Click the 'View' button to view individual items details

[Edit](#)

Item sub-groups can be edited here.



TIP

Only users with proper rights and authorizations can edit Item sub-group details.

Group Description



The ARVs main category.

Group Code
01

Print Layout :

Abacavir 60mg, Tablets, 30 Tabs

[Back](#) [Edit](#) [Shopping Cart](#)

Item Code	110001
Item Name	Abacavir 60mg, Tablets, 30 Tabs
Strength	60mg
Formulation	Dispersible tablet
Pack Size	30
Unit Of Measure	Pack
Item Group	ARVs
Unit Price	5 (USD)

[Add to Cart](#)



3.2 Generating Requisitions

Step 3.2 (a) – Click on the 'Catalogue' drop down menu and select 'Items'. The Item master data will appear.

You can also search for a specific item here.

Step 3.2 (b) – Click 'Add to Cart' to place the item into the shopping cart.

Help All times in East African Time (EAT) 11 Ken Shabola

Items

+ New Item Deleted Items Shopping Cart

Search Item (Enter Item name, code or group) Search here

Item Type	Item Code	Item Name	Pack Size	Unit Price (USD)	Unit Of Measure	Item Group	Actions
item	110001	Abacavir 60mg, Tablets, 30 Tabs	30	5	Pack	ARVs	View Edit Add to Cart Delete
item	110002	Abacavir 20Mg/ml, Oral Solution, 240ml	240ml	6.83	pack	ARVs	View Edit Add to Cart Delete
item	110003	Abacavir 300mg, Tablets, 60 Tabs	60	1	pack	ARVs	View Edit Add to Cart Delete
item	110004	Abacavir/Lamivudine 60/30Mg, dispersible tablets, 60 Tabs	60	4	pack	ARVs	View Edit Add to Cart Delete
item	110005	Abacavir/Lamivudine 600/300mg, Tablets, 30 Tabs	30	12.75	pack	ARVs	View Edit Add to Cart Delete
item	110006	Atazanavir/Ritonavir 300/100mg, Tablets, 30 Tabs	30	16.3	pack	ARVs	View Edit Add to Cart Delete
item	110007	Atazanavir 300mg, Capsules, 30 Caps	30	17	pack	ARVs	View Edit Add to Cart Delete
item	110008	Efavirenz 100mg, Tablets, 30 Tabs	30	1	pack	ARVs	View Edit Add to Cart Delete
item	110009	Efavirenz 200Mg, Scored tablets, 90 Tabs	90	9.3	pack	ARVs	View Edit Add to Cart Delete
item	110010	Efavirenz 50mg, Capsules, 30 Caps	30	2.25	pack	ARVs	View Edit Add to Cart Delete

Add Item to Cart

Abacavir 60mg, Tablets, 30 Tabs

Quantity

100

Unit Price

5

Total

500

Add

Close

Step 3.2 (c) – Enter the quantities required for this particular item (**Abacavir 60mg**).

Prices for items are already defined in the system and therefore appear automatically. Totals are calculated automatically as well.

Step 3.2 (d) – Once quantities are entered, save the item into the shopping cart by clicking on the 'Add' button.

Cart save status

Item added to the cart.

Step 3.2 (e) – Click on the close button

Close

Viewing the Shopping Cart

The '**Add to Cart**' and '**Shopping Cart**' functionalities help users select, and assemble items in an orderly manner before they can be placed as line items in a requisition. Open Shopping Carts are those that have not been converted to requisitions.

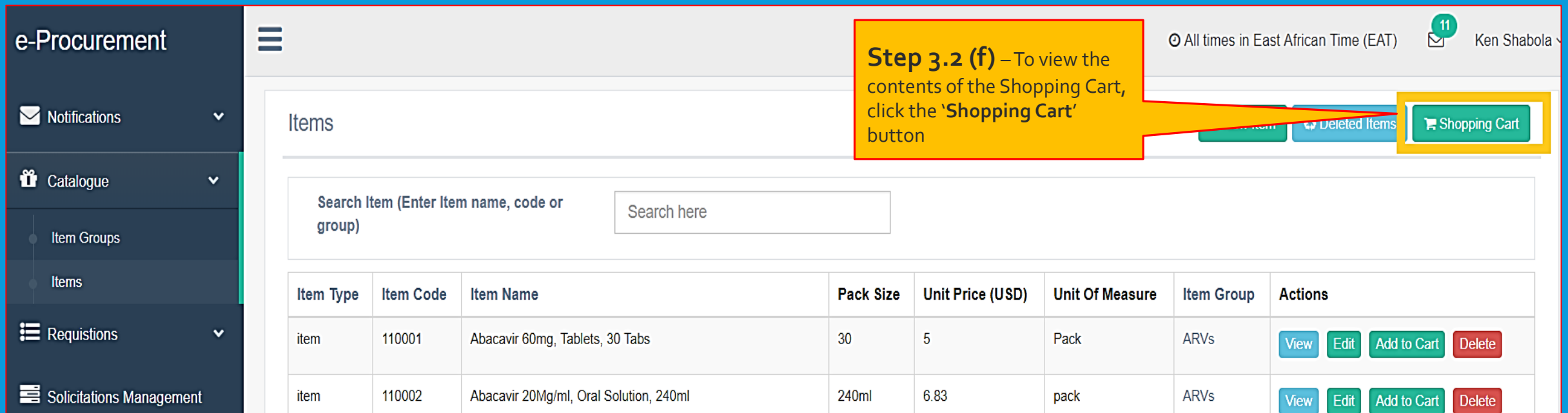


IMPORTANT

Any Open shopping cart that has not been converted to a requisition will be visible here. You cannot add an item into a new shopping cart if this item exists in another open shopping cart.

There are various ways to access open shopping carts:

1. On the main navigation Menu, Go to **Catalogue** → **Items** → **Top-Right hand side 'Shopping Cart' button (See image below)**
2. Immediately a user has logged in to the system, at the bottom part of the user's dashboard, click '**Shopping Cart/ My Requisitions**'
3. On the main navigation Menu, Go to **Requisitions** → **Shopping Cart**



Step 3.2 (f) – To view the contents of the Shopping Cart, click the '**Shopping Cart**' button

The screenshot shows the 'e-Procurement' dashboard with a sidebar on the left containing 'Notifications', 'Catalogue', 'Item Groups', 'Items', 'Requisitions', and 'Solicitations Management'. The main content area is titled 'Items' and features a search bar and a table of items. The 'Shopping Cart' button is highlighted in a yellow box in the top right corner of the items list.

Item Type	Item Code	Item Name	Pack Size	Unit Price (USD)	Unit Of Measure	Item Group	Actions
item	110001	Abacavir 60mg, Tablets, 30 Tabs	30	5	Pack	ARVs	View Edit Add to Cart Delete
item	110002	Abacavir 20Mg/ml, Oral Solution, 240ml	240ml	6.83	pack	ARVs	View Edit Add to Cart Delete

Contents of the Shopping Cart

The shopping cart below contains the item that was added in **Steps 3.2 (b) to 3.2 (e)**

Shopping Cart

Search Cart Items

Name	Group	Unit Price (USD)	Quantity	Total (USD)	Actions
Abacavir 60mg, Tablets, 30 Tabs	ARVs	5.00	100	500.00	Update Remove

< previous next >

Page 1 of 1, showing 1 item(s) out of 1 total

[+ Add To Cart](#) [+ Add Requisition](#) [Empty Cart](#)


- Click on the **'Update'** button to update price and quantity details for a specific item.
- Click the **'Remove'** button to delete a specific item in the cart.

- Click the **'Add To Cart'** button to add another item to shopping cart
- Click the **'Add Requisition'** button to save the contents of this shopping cart to a requisition.
- Click the **'Empty Cart'** button to delete **ALL** line items of this Shopping Cart.




Add more items to the shopping cart

You can add more items to a shopping cart by using:

1. The 'Add To Cart' button located in the shopping cart. (See  arrow below)
2. The main navigation menu, go to Catalogue → Items

These two (2) methods will take you back to the Item Master data form where you will be able to search for an Item and add it to the shopping cart. Follow [Steps 3.2 \(b\) to 3.2\(e\)](#) to add more items to the shopping cart. Follow [Step 3.2 \(f\)](#) to view your shopping cart

Shopping Cart

 **TIP**
The contents of your shopping cart should belong to the same Item group.

	Group	Unit Price (USD)	Quantity	Total (USD)	Actions
Abacavir 60mg, Tablets, 30 Tabs	ARVs	5.00	1,000	5,000.00	Update Remove
Atazanavir 300mg, Capsules, 30 Caps	ARVs	17.00	1,000	17,000.00	Update Remove
Efavirenz 50mg, Capsules, 30 Caps	ARVs	2.25	1,000	2,250.00	Update Remove

< previous next >

Page 1 of 1, showing 3 item(s) out of 3 total

[+ Add To Cart](#) [+ Add Requisition](#) [Empty Cart](#)

Converting a Shopping Cart into a Requisition

Shopping Cart

Search Cart Items

Name	Group	Unit Price (USD)	Quantity	Total (USD)	Actions
Abacavir 60mg, Tablets, 30 Tabs	ARVs	5.00	1,000	5,000.00	Update Remove
Atazanavir 300mg, Capsules, 30 Caps	ARVs	17.00	1,000	17,000.00	Update Remove
Efavirenz 50mg, Capsules, 30 Caps	ARVs	2.25	1,000	2,250.00	Update Remove

< previous next >

Page 1 of 1, showing

Step 3.2 (g): Once ALL necessary items have been added to the shopping cart, Click 'Add Requisition' button to create a requisition for the items.

+ Add To Cart

+ Add Requisition

Empty Cart



New Requisition

Funds Source Filter projects by funds source

Funding Agency Project

COP Year

Current Plan Name

Project Year

Financial Year

Period(Quarter)

Currency

Requisition Total (USD) **25,250**

Requisition Status

Date Required

Terms of Reference

Attach Terms of Reference No file chosen

Step 3.2 (h) – Requisition Header Details

- Select the relevant Financing partner/ Donor in the 'Funds Source' field
- Select project attached to the donor in 'Funding Agency Project'
- Click the drop down arrow and select the COP (Country Operational Plan) year.
- Based on the Funding Agency selected, the Current Plan, Project Year, and Financial Year will be displayed automatically by the system.
- Select the Period Quarter in this preferred format ... 01,02, and so on.,
- Currency used is US Dollars
- **Requisition Totals appear automatically**
- Select Requisition Status as 'Published'. If additional editing of the requisition is required, then select 'Draft'.
- Enter the date that the items are required
- Type Terms of Reference (TOR) and attach relevant TOR documentation (optional)

Line Details

Product	Unit Price (USD)	Quantity	Sub Total (USD)	Actions
Efavirenz 50mg, Capsules, 30 Caps	2.25	1,000	2,250.00	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
Abacavir 60mg, Tablets, 30 Tabs	6.00	1,000	6,000.00	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
Atazanavir 300mg, Capsules, 30 Caps	17.00	1,000	17,000.00	<input type="button" value="Edit"/> <input type="button" value="Remove"/>

Step 3.2 (i) – Click the 'Add Requisition' button to save the requisition and forward for approval.

☰ Help All times in East African Time (EAT) 11 Ken Shabola ▾

The requisition has been added successfully. ✕

My Requisitions Shopping Cart ^ ✕

#	ID	Category	Date Required	Status	HOD Approval	Finance Approval	Executive Director Approval	Reference Number	Actions
1	ARVs#36	ARVs	7/31/18	published	Pending	Pending	Pending		View

Step 3.2 (j) – Click the 'View' button to see the requisition details

Once you execute **step 3.2 (i)**, the system will take you back to the main requisitions window. Your requisition will be placed at the top of the list (in the case where other requisitions exist). If it is the only requisition created, then it will appear as a single line item under **'My Requisitions'**.

Requisition Reference numbers are automatically assigned by the system when bid managers, evaluation committee, and pre-qualified suppliers have been assigned to the requisition.

Requisitions that have not been acted upon by approvers will read **'Pending'**.

Viewing Requisition Details

Requisition Reference: ARVs#64 created: 9/26/18, 12:25 PM

[Print Requisition](#)

Created by: Ken Shabola
Category: ARVs
Department: Human Resource
Required Date: 10/31/18
COP Year: 18
Project Year: 02
Quarter Code: 01
Requisition Type: item
Funding Project: MAUL-HSIP

HOD Approval: pending
Budget Approval: pending
Executive Director Approval: pending

Line Details

Item Name	Quantity	Unit Price (USD)	Sub Total (USD)
Abacavir 60mg, Tablets, 30 Tabs	1,000	6.00	6,000.00
Atazanavir 300mg, Capsules, 30 Caps	1,000	17.00	17,000.00
Efavirenz 50mg, Capsules, 30 Caps	1,000	2.25	2,250.00

Total: USD 25,250.00


The 'activity log' shows the current status of a requisition and actions that have been taken on it. It can help users notice delays especially when it comes to approvals.

Activity log



Ken Shabola

Created - Created a requisition

Created:  Wednesday, September 26, 2018 at 12:25 PM

Terms of references details

Supply of ARVs for Project Year 2



- Notifications
- Catalogue
- Requisitions
- Solicitations Management
- Evaluations
- Awards
- Contract Management

Dashboard

Assigned Requisitions 4

ID	Reference	Project	HOD Approved	Finance Approval	Executive Director Approval	Actions
ARVs35	MAUL-HSIP/MED/18/0201/03	MAUL-HSIP	Approved	Approved	Approved	View
Ols & STIs29	MAUL-HSIP/MED/18/0202/01	MAUL-HSIP	Approved	Approved	Approved	View
ARVs25	MAUL-HSIP/MED/17/0401/12	MAUL-HSIP	Approved	Approved	Approved	View
Vehicles22	MAUL-HSIP/SUP/17/0403/10	MAUL-HSIP	App			View

Assigned Requisitions
 If you have been successfully assigned the role of Bid Manager to specific requisitions, they will appear here in the 'Assigned Requisitions' listing.

Shopping Cart / My Requisitions Requisitions

Shopping Cart

Item Name	Unit Price (\$)	Quantity	Line Total (\$)	Actions
Abacavir 60mg, Tablets, 30 Tabs	5	1,000	5,000	Remove
Atazanavir 300mg, Capsules, 30 Caps	17	1,000	17,000	Remove
Efavirenz 50mg, Capsules, 30 Caps	2.25	1,000	2,250	Remove

- [Add To Cart](#)
[Add Requisition](#)
[Empty Cart](#)

Shopping Cart/ My Requisitions
 Shopping Carts that have not been converted to requisitions appear here. You are able to add additional items to the cart, remove items from the cart, and create a requisition from the cart.



3.3.1 Head of Department (HOD) - Requisition Approval



The HOD will be required to log in to the system. Follow **Steps 2.1 (a) – 2.1 (c)** to log in.

Note: System Notifications can also be accessed here.

Step 3.3.1 (a) – After logging in, the HOD will be required to view his/her system notifications. Click on the **System Notification icon**.

The screenshot displays the e-Procurement system interface. On the left, a dark sidebar menu contains the following items: e-Procurement, Notifications (highlighted with a yellow box), Catalogue, Requisitions, Solicitations Management, Evaluations, Awards, and Contract Management. The main content area is titled 'Dashboard' and includes sections for 'Assigned Requisitions' (with a green progress indicator), 'Shopping Cart /My Requisitions' (with a 'Requisitions' sub-label), 'Shopping Cart', and 'Top 5 Requisitions'. In the top right corner, a notification icon with a '34' badge is highlighted with a yellow box, and a 'See All Alerts >' button is also highlighted with a yellow box. The user's name 'Paul Ng'ang'a' and the time 'All times in East African Time (EAT)' are visible in the top right header.



Use the **Show Entries** functionality to minimize the number of notifications to be displayed on the screen.

If you apply **'Mark as Read'** / **'Mark all as Read'**, the notifications will be available here.

If you apply **'Mark all as Read'**, all notifications are removed from this view.

System Notifications (Unread)

View Read Notifications Mark all as Read

Show 10 entries Search:

#	Title	Time	Created	Actions
1	Requisition 27 approved	21 minutes ago	9/17/20, 12:56 PM	
2	Requisition 27 approved	23 minutes ago	9/17/20, 12:54 PM	
3	Requisition 27 added by ken	1 week, 1 day ago	9/17/20, 12:36 PM	Mark as Read View
4	Requisition 25 approved	4 weeks, 1 day ago	8/19/20, 1:57 PM	Mark as Read View
5	Requisition 25 approved	4 weeks, 1 day ago	8/19/20, 1:55 PM	Mark as Read View
6	Requisition 25 added by ken	4 weeks, 1 day ago	8/19/20, 1:54 PM	Mark as Read View
7	Requisition 24 added by ken	4 weeks, 1 day ago	8/19/20, 1:41 PM	Mark as Read View
8	Requisition 23 approved	4 weeks, 1 day ago	8/19/20, 11:40 AM	Mark as Read View
9	Requisition 23 approved	4 weeks, 1 day ago		Mark as Read View
10	Requisition 23 added by ken	4 weeks, 1 day ago		Mark as Read View

Most recent system notifications are located at the top most level.

A user is able to search for specific requisitions using this Search functionality.

If you apply **'Mark as Read'** on a specific notification, it is removed from this view and will be taken to **'View Read Notifications'**.
Note: The number of notifications in the list reduces when you apply this action.



System Notifications (Unread)

[View Read Notifications](#)[Mark all as Read](#)

Show entries

Search:

#	Title	Time	Created	Actions
1	Requisition 27 approved	21 minutes ago	9/17/20, 12:56 PM	Mark as Read View
2	Requisition 27 approved	23 minutes ago	9/17/20, 12:54 PM	Mark as Read View
3	Requisition 27 added by ken	40 minutes ago	9/17/20, 12:36 PM	Mark as Read View
4	Requisition 25 approved	4 weeks, 1 day ago	8/19/20, 1:57 PM	Mark as Read View
5	Requisition 25 approved	4 weeks, 1 day ago	8/19/20, 1:55 PM	Mark as Read View
6	Requisition 25 added by ken	4 weeks, 1 day ago	8/19/20, 1:54 PM	Mark as Read View
7	Requisition 24 added by ken	4 weeks, 1 day ago	8/19/20, 1:41 PM	Mark as Read View
8	Requisition 23 approved	4 weeks, 1 day ago	8/19/20, 11:40 AM	Mark as Read View
9	Requisition 23 approved	4 weeks, 1 day ago	8/19/20, 11:39 AM	Mark as Read View
10	Requisition 23 added by ken	4 weeks, 1 day ago	8/19/20, 11:29 AM	Mark as Read View

Step 3.3.1 (b) – Click the 'View' button to view details of the requisition for approval.



Notification Details ✕

Requisition 36 added by ken

A requisition with id 36 has been added. It is published.

[View Requisition](#) [Mark as Read](#)

Step 3.3.1 (c) – Click View Requisition to view details of requisition.

[Close](#)





Requisition Reference: ARVs#36 created: 5/3/18, 11:26 AM

Print Requisition

Approval

Created by: Ken Shabola
Category: ARVs
Department: Human Resource
Required Date: 7/31/18
Quarter Code: 02
Financial Year: 2018
Requisition Type: item
Funding Project: MAUL-HSIP

HOD Approval: pending
Budget Approval: pending
Executive Director Approval: pending

Step 3.3.1 (d) – The HOD will view the contents of the requisition and then click the 'Approval' button to approve the requisition

Line Details

Item Name	Quantity	Unit Price (USD)	Sub Total (USD)
Abacavir 60mg, Tablets, 30 Tabs	1,000	5.00	5,000.00
Atazanavir 300mg, Capsules, 30 Caps	1,000	17.00	17,000.00
Efavirenz 50mg, Capsules, 30 Caps	1,000	2.25	2,250.00

Total: USD 24,250.00

Activity log

Terms of references details



Ken Shabola

Created - Created a requisition

Created: Thursday, May 3, 2018 at 11:26 AM

Supply of Medical Supplies - ARVs

ARVs#36 Requisition Approval

Approval Status: Pending

Remarks:

Submit

Step 3.3.1 (f) – Click 'Submit' to complete the HOD's approval process

Step 3.3.1 (e) – Click on the drop down arrow and select 'Approved'

Also give a brief explanation for your choice in the remarks field.

Back to Requisition

ARVs#36 Requisition Approval

The requisition has been approved, the finance head of department has been notified to allocate budget.

Back to Requisition

1. An E-mail and system notifications will be sent to the originator of the requisition stating that the document has been 'approved'.
2. The Finance Manager will also receive E-mail and System notifications and will be required to take necessary action.

Head of Department (HOD) - Requisition Rejection



The HOD will be required to perform the following tasks (Steps 3.3.1 (a) – Steps 3.3.1 (d))

- Log in to the system.
- Access System notifications
- View the requisition
- Access the Approval Window below

ARVs#39 Requisition Approval Back to Requisition

Approval Status	Rejected
Remarks	As discussed, kindly adjust the quantities of <u>Atazanavir 300mg, Capsules, 30 Tabs</u>

Step 3.3.1 (g) – Click on the drop down arrow and select 'Rejected'

Also, give a brief explanation for your choice in the remarks field as shown.

Submit

Step 3.3.1 (h) – Click on the 'Submit' button.

ARVs#39 Requisition Approval Back to Requisition

The requisition has been marked as rejected. ✕



If the HOD rejects the requisition, the originator will be notified via E-mail and System notifications.

The Originator of the requisition will be required to perform the following actions:

- Log in to the system.
- Access system notifications (**See Image Below**).

System Notifications (Unread)

View Read Notifications

Mark all as Read

#	Title	Time	Created	Actions
1	Requisition 39 rejected	3 minutes ago	6/18/18, 12:12 PM	Mark as Read View

Locate the rejected requisition.

Step 3.3.1 (i) – Click on the 'View' button.



Notification Details ✕

Requisition 39 rejected

A requisition with id 39 has been rejected by head of department.

[View Requisition](#) [Mark as Read](#)

Step 3.3.1 (j) – Click on the 'View' button.

[Close](#)



Created by: Ken Shabola
Category: ARVs
Department: Human Resource
Required Date: 7/31/18
Quarter Code: 02
Financial Year: 2018
Requisition Type: item
Funding Project: MAUL-HSIP

HOD Approval: rejected
HOD Approval Date: 6/18/18, 12:12 PM
Budget Approval: pending
Executive Director Approval: pending

Step 3.3.1 (k) – Click on the 'Edit' button.

Line Details

Item Name	Quantity	Unit Price (USD)	Sub Total (USD)
Abacavir 60mg, Tablets, 30 Tabs	1,000	5.00	5,000.00
Atazanavir 300mg, Capsules, 30 Caps	1,000	17.00	17,000.00
Efavirenz 50mg, Capsules, 30 Caps	1,000	2.25	2,250.00

Total: USD 24,250.00

The originator of the requisition will be able to view feedback from the HOD with the required adjustments.

Activity log

Paul Ng'ang'a
Rejected - As discussed, kindly adjust the quantities of Atazanavir 300mg, Capsules, 30 Tabs
Created: Monday, June 18, 2018 at 12:12 PM

Ken Shabola
Created - Created a requisition
Created: Monday, June 18, 2018 at 11:50 AM

Terms of references details

Supply of Medical Supplies - ARVs



Currency

USD

Requisition Total (USD) 24,250.00

The requisition will open in edit mode and the user will be able to edit header and Line Item details

Requisition Terms of Reference

Terms of Reference

Supply of Medical Supplies - ARVs

Attach Terms of Reference

Choose file No file chosen

Step 3.3.1 (l) – Click on the 'Edit' button to open the 'Edit Line Item' window. In this window, you will be able to edit the quantity details.

Requisitions Details

Item Name	Quantity	Unit Price (USD)	Sub Total (USD)	Actions
Abacavir 60mg, Tablets, 30 Tabs	1000	5.00	5,000.00	 
Atazanavir 300mg, Capsules, 30 Caps	1000	17.00	17,000.00	 
Efavirenz 50mg, Capsules, 30 Caps	1000	2.25	2,250.00	 

Step 3.3.1 (m) – After making the required adjustments, click on the 'Update Requisition' button to save the changes.

Update Requisition



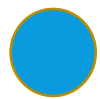
Step 3.3.1 (n) – After making the required adjustments, click on the 'Yes, Send Notifications' button to re-submit the requisition to the HOD.

The requisition has been saved, Would you like to notify the Head of Department to review the changes?.

Final State of the Requisition?

Yes, Send Notifications No, Return to Requisition

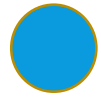
The Head of Department has been notified and an email sent.



The HOD will be notified via E-mail and System notifications and will be required to take necessary action. If the requisition is in order, the HOD will follow the approval process as described in **Steps 3.3.1 (a) – 3.3.1 (f)**



3.3.2 Finance Manager – Requisition Approval



The Finance Manager will be required to log in to the system. Follow **Steps 2.1 (a) – 2.1 (c)** to log in.

Note: System Notifications can also be accessed here.

Step 3.3.2 (a) - After logging in, the Finance Manager will be required to view his/her system notifications. Click on the **System Notification icon**.

The screenshot displays the e-Procurement dashboard interface. On the left, a dark navigation sidebar lists various modules: Notifications (highlighted with a yellow box), Purchase Orders, Catalogue, Requisitions, Solicitations Management, Evaluations, Awards, and Contract Management. The main content area is titled 'Dashboard' and features several widgets: 'Assigned Requisitions' with a green notification badge showing '1', 'Shopping Cart /My Requisitions' (with a sub-link for 'Requisitions'), 'Shopping Cart', and 'Top 5 Requisitions'. At the top right of the dashboard, the user's profile 'Andrew Muhenda' is visible, along with a system notification icon (envelope) with a green badge showing '21', which is highlighted with a yellow box. The browser's address bar shows 'e-procurement/dashboard' and the time zone is set to 'All times in East African Time (EAT)'. A small yellow icon is visible in the bottom left corner of the slide.

Most recent system notifications are located at the top most level.

- Notifications
- System Notifications
- Purchase Orders
- Catalogue
- Requisitions

System Notifications (Unread)

View Read Notifications Mark all as Read

#	Title	Time	Created	Actions
1	Requisition 37 needs Budget Action	2 days, 18 hours ago	5/4/18, 3:36 PM	Mark as Read View
2	Requisition 36 needs Budget Action	2 days, 20 hours ago	5/4/18, 1:34 PM	Mark as Read View
3	Requisition 35 needs Budget Action	1 week, 5 days ago	4/25/18, 11:08 AM	Mark as Read View

Step 3.3.2 (b) – Click the 'View' button to view details of the requisition for approval.



Notification Details

Requisition 37 needs Budget Action

A requisition with id 37 from Human Resource department needs budget action.

[View Requisition](#) [Mark as Read](#)

Step 3.3.2 (c) – Click 'View Requisition' to view details of the requisition.

[Close](#)



- Notifications
- Purchase Orders
- Catalogue
- Requisitions
- Solicitations Management
- Evaluations
- Awards
- Contract Management

Requisition Reference: ARVs#37 created: 5/4/18, 3:35 PM

Print Requisition **Approval**

Created by: Ken Shabola
Category: ARVs
Department: Human Resource
Required Date: 9/4/18
Quarter Code: 02
Financial Year: 2018
Requisition Type: item
Funding Project: MAUL-HSIP

HOD Approval: approved
HOD Approval Date: 5/4/18, 3:36 PM
Budget Approval: pending
Executive Director Approval: pending





Step 3.3.2 (d) – Click the 'Approval' button to approve the requisition

Line Details

Item Name	Quantity	Unit Price (USD)	Sub Total (USD)
Abacavir 60mg, Tablets, 30 Tabs	1,000	5.00	5,000.00
Atazanavir 300mg, Capsules, 30 Caps	1,000	17.00	17,000.00
Efavirenz 50mg, Capsules, 30 Caps	1,000	2.25	2,250.00

Total: USD 24,250.00

Activity log

- 
Paul Ng'ang'a
Approved - d
 Created:  Friday, May 4, 2018 at 3:36 PM
- 
Ken Shabola
Created - Created a requisition
 Created:  Friday, May 4, 2018 at 3:35 PM

Terms of references details

Terms of reference is not available.

The **activity log** shows the current status of a requisition and actions that have been taken on it.

Step 3.3.2 (f) – Input the budget amount. In our case we will use the requisition value.

Click on the drop down arrow and select 'Approved'

Also give a brief explanation (with respect to the planned budget) in the 'Budget Justification' field.

Step 3.3.2 (e) – Click the 'View Procurement Plan' button to view the planned budget for the item sub-group listed in the requisition

The screenshot shows a requisition form for ARVs#37. The total budget is 24,250 USD. The Budget Justification field contains the word 'Approved'. The Finance Approval dropdown is also set to 'Approved'. A 'Submit' button is highlighted in yellow. A 'View Procurement Plan' button is also highlighted in yellow. A red arrow points from the 'View Procurement Plan' button to a separate window.

Step 3.3.2 (g) – Click **Submit** to complete the Finance Manager's approval process

Procurement Plan for ARVs item group		
Planned Budget	Funds Committed/ Allocated	Funds Available


1. An E-mail notification will be sent to the originator of the requisition stating it is 'approved' by the Finance Manager
2. The originator will also get a notification in the system and will be able to view the status of the requisition.

Once you click 'View Procurement Plan' button, this window opens and you'll be able to see the budget recommendations for the particular item group (in this case ARVs) and whether the requisition has gone beyond this budget. The Procurement Specialist will be responsible for configuring and defining the Procurement Plan in the system.

Finance Manager – Requisition Rejection

 The Finance Manager will be required to perform the following actions (Steps 3.3.2 (a) – 3.3.2 (d) + (Steps 3.3.2 (h) – 3.3.2 (i)):

- Log into the system
- Access system notifications
- Locate the requisition that requires budget action and click on the '**View**' button to view contents of the requisition.
- Access the '**Budget Allocation**' using the '**Approval**' button.
- Select '**Rejected**' on the drop down arrow provided by the system.
- Provide justification for the drop down selection above.
- Send the requisition back to the originator by using the '**Submit**' button.

 An E-mail notification will be sent to the originator and HOD. The originator of the requisition will be required to make necessary adjustments.

The originator of the requisition will be required to perform the following actions (Steps 3.3.1 (i) – 3.3.1 (n)):

- Log into the system
- Access system notifications
- Locate the rejected requisition and click on the '**View**' button to open the document on edit mode.
- Click the '**Edit**' button provided to begin making adjustments. The originator of the requisition is only able to edit the header and details of the document.
- Update the changes made by clicking the '**Update requisition**' button.
- Re-submit the requisition to the HOD to review the changes by clicking '**Yes, Send Notifications**' button.





Allocate budget to Requisition: ARVs#39

[View Procurement Plan](#)

Total (USD) 24,250

Budget (USD)

24250

Finance Approval

Rejected

Budget Justification

The procurement specialist needs to adjust the procurement plan so that the this requisition does not go over the initial budget.

Submit

Step 3.3.2 (i) – Click on the 'Submit' button to send the document back to the originator.

Step 3.3.2 (h) – After the FM has clicked the 'Approval' button. This window appears. The FM will click on the 'View Procurement Plan' button and check whether the requisition is within the budget. If adjustments are required with regards to the budget, then the Finance Manager will 'Reject' the requisition and send back to the originator.

Requisition marked as rejected. Notifications has been sent.



Finance Manager – Requisition Rejection (Cont)

After the originator of the requisition has implemented recommendations as advised by the Finance Manager, he/ she will submit the document to the HOD for review (Steps 3.3.1 (i) – 3.3.1 (n))

The HOD will be required to perform the following actions (Steps 3.3.1 (a) – Steps 3.3.1 (f)) :

- Log in to the system
- Access system notifications.
- Locate the amended requisition and click on the '**View**' button to view contents of the requisition.
- Access the '**Approval Window**' using the '**Approval**' button.
- Select '**Approved**' on the drop down arrow provided by the system.
- Give brief explanation for the selection above.
- Submit the approved requisition to the Finance Manager by clicking the '**Submit**' button

The Finance manager will be notified through E-mail and system notifications, and will be required to take necessary actions.

The originator of the requisition will also receive notifications on the HOD's decision.

If the Finance manager is comfortable with the updates made, then he/ she can approve the requisition as described in the Finance Manager approval process (Steps 3.3.2 (a) – 3.3.2 (g))



3.3.3 Executive Director (ED) – Requisition Approval

The ED will be required to log in to the system. Follow **Steps 2.1 (a) – 2.1 (c)** to log in.

Note: System Notifications can also be accessed here.

Step 3.3.3 (a) - After logging in, the ED will be required to view system notifications. Click on the **System Notification icon**.

The screenshot displays the e-Procurement system interface. On the left, a dark sidebar contains the 'e-Procurement' logo and a menu with items: 'Notifications' (highlighted with a yellow box), 'Catalogue', 'Requisitions', and 'Solicitations Management'. The main content area is titled 'Dashboard' and features a section for 'Assigned Requisitions' with a green progress indicator. In the top right corner, there is a user profile for 'John Doe' with a notification icon (envelope) that has a '14' badge and is highlighted with a yellow box. A 'See All Alerts >' button is located below the notification icon. The top navigation bar includes 'Help' and 'All times in East African Time (EAT)'.



e-Procurement

Notifications

System Notifications

Catalogue

Requisitions

System Notifications

View Read Notifications

Mark all as Read

#	Title	Time	Created	Actions
1	Requisition 37 approved	5 minutes ago	5/7/18, 12:18 PM	Mark as Read View
2	Requisition 35 approved	1 week, 5 days ago	4/25/18, 12:43 PM	Mark as Read V

Help All times in East African Time (EAT) 14 John Doe

Most recent system notifications are located at the top most level.

Step 3.3.3 (b) – Click the 'View' button to view details of the requisition.



Notification Details



Requisition 37 approved

A requisition with id 37 has been marked as approved by Finance.

View Requisition

Mark as Read

Step 3.3.3 (c) – Click 'View Requisition' to view details of the requisition

Close



- Notifications
- Catalogue
- Requisitions
- Solicitations Management
- Evaluations
- Awards
- Contract Management

Requisition Reference: ARVs#37 created: 5/4/18, 3:35 PM

Print Requisition Approval

Created by: Ken Shabola
 Category: ARVs
 Department: Human Resource
 Required Date: 9/4/18
 Budget: USD 24,250.00
 Quarter Code: 02
 Financial Year: 2018
 Requisition Type: item
 Funding Project: MAUL-HSIP

HOD Approval: approved
 HOD Approval Date: 5/4/18, 3:36 PM
 Budget Approval: approved
 Budget Approval Date: 5/7/18, 12:18 PM
 Executive Director Approval: pending

Step 3.3.3 (d) – Click the 'Approval' button to approve the requisition

Line Details

Item Name	Quantity	Unit Price (USD)	Sub Total (USD)
Abacavir 60mg, Tablets, 30 Tabs	1,000	5.00	5,000.00
Atazanavir 300mg, Capsules, 30 Caps	1,000	17.00	17,000.00
Efavirenz 50mg, Capsules, 30 Caps	1,000	2.25	2,250.00

Total: USD 24,250.00

Activity log

Andrew Muhenda
 Approved - Within planned budget
 Created: Monday, May 7, 2018 at 12:18 PM

Paul Ng'ang'a

Terms of references details

Terms of reference is not available.

The activity log shows the current status of a requisition and actions that have been taken on it.

e-Procurement

Notifications

Catalogue

Evaluations

Awards

Contract Management

ARVs#37 Approval

Help

All times in East African Time (EAT)

14

John Doe

Back to Requisition

Approval Status: Approved

Remarks: HOD Approved
Budget Approved
The Requisition is in order

Submit

Step 3.3.3 (f) – Click 'Submit' to complete the Executive Director's approval process

Step 3.3.3 (e) – Click on the drop down arrow and select 'Approved'

Also give a brief explanation (with respect to the planned budget) in the 'Remarks' field.

ARVs#37 Approval

Back to Requisition

The requisition has been approved successfully.

1. An E-mail notification will be sent to the Originator, HOD, PA HOD, and PA specialist of the requisition stating that it is 'approved' by the ED
2. The originator will also get a notification in the system and will be able to view the status of the requisition.

Executive Director (ED) – Requisition Rejection



The ED will be required to perform the following actions via the system:

- Log into the system
- Access system notifications
- Locate the requisition that requires approval and click on the '**View**' button to view contents of the requisition.
- Access the '**Approval Window**' using the '**Approval**' button (See next page).
- Select '**Rejected**' on the drop down arrow provided by the system (**Steps 3.3.3 (g) – 3.3.3 (h)**).
- Give brief explanation for the selection above.
- Submit the rejected requisition to the originator and the HOD by clicking the '**Submit**' button

The Originator and HOD will receive E-mail and system notifications on the ED's decision.

Note: The ED's rejection is final and the originator of the requisition is not able to edit the document; no more approvals/ rejections can be executed on the document. The department that initiated the requisition will take the ED's recommendations into consideration and create a new requisition with proper amendments.



ARVs#39 Approval [Back to Requisition](#)

Approval Status: Rejected

Remarks: Kindly confirm if the ordered quantities will be sufficient for the financial year

Submit

Step 3.3.3 (g) – After the ED clicked the 'Approval' button. This window appears. If adjustments are required, then Click on the drop down arrow and select either 'Rejected'

Also give a brief explanation for the selection in the 'Remarks' field.

Step 3.3.3 (h) – Click 'Submit' to complete the ED's rejection process.

ARVs#39 Approval

The requisition has been rejected successfully.



4.0 PREPARING SOLICITATION DOCUMENTS


 Solicitation is the process of seeking information, proposals, or quotations from suppliers.


This section deals with the following tasks:

- Assigning a Bid Manager (BM) to a requisition
- Creating Solicitation documents categories and attaching Solicitation Documents to these categories
- Assigning an appropriate procurement method
- Proposing Evaluation Team
- Proposing a list of pre-qualified suppliers
- Generating Statement of Requirements
- Generating Price Schedule
- Review of Solicitation Documents by PA HOD or PA Specialist
- Approval of SBD by PAC Members



4.1 Assigning A Bid Manager

 The Procurement Agency (PA) HOD or the Procurement Specialist is responsible for assigning a Bid Manager to a requisition after it is fully approved.

 The PA HOD and the PA Specialist will receive an email notification after ED approval; either of them will be required to take necessary action. Once a bid manager is assigned to a requisition, he/she will be notified via email.

A Bid Manager is responsible for:

- Assigning a procurement method
- Proposing Evaluation Team
- Proposing a list of pre-qualified suppliers
- Preparing Standard Bidding Documents (SBD)/ Solicitation Documents
- Sending solicitation documents to the Procurement HOD for approval



Bid Manager Assignment



The Procurement HOD or the Procurement Specialist will be required to log in to the system.

The screenshot shows the e-Procurement system interface. On the left is a dark sidebar with navigation options: Notifications, Catalogue, Requisitions, Purchase Orders, Solicitations Management, Other Approvals, and Evaluations. The main content area is titled 'Dashboard' and features a search bar with filters for 'Procurement methods' and 'Funding agencies'. Below this is a section titled 'Requisitions Pending Bid Manager Assignment' with a notification badge showing '2'. A table lists requisitions with columns for ID, Created Date, Total, HOD Approved, Finance Approval, Executive Director Approval, and Actions. The first row (ID 37) is highlighted in yellow. A red callout box points to a red notification icon in the top right corner of the table section. Another red callout box points to the 'View' button in the Actions column of the first row.

ID	Created Date	Total	HOD Approved	Finance Approval	Executive Director Approval	Actions
37	5/4/18, 3:35 PM	24,250	Approved	Approved	Approved	View
19	10/23/17, 1:41 PM	49,965	Approved	Approved	Approved	View

Step 4.1 (a) – After logging in, the PA Specialist/ PA HOD will click on this arrow to view requisitions that have not been assigned a Bid Manager.

Most recent requisitions are located at the top most level.

Step 4.1 (b) – Click the 'View' button to view details of the requisition





- Notifications
- Catalogue
- Requisitions
- Purchase Orders
- Solicitations Management
- Other Approvals
- Evaluations
- Awards
- Contract Management
- Reports

Requisition Reference: MAUL-HSIP/MED/18/0201/04 created: 5/4/18, 3:35 PM

Print Requisition Assign Bid Manager

Created by: Ken Shabola
Category: ARVs
Department: Human Resource
Required Date: 9/4/18
Budget: USD 24,250.00
Quarter Code: 02
Financial Year: 2018
Requisition Type: item
Funding Project: MAUL-HSIP

HOD Approval: approved
HOD Approval Date: 5/4/18, 3:36 PM
Budget Approval: approved
Budget Approval Date: 5/7/18, 12:18 PM
Executive Director Approval: approved
Executive Director Approval Date: 5/7/18, 12:27 PM

Step 4.1 (c) – Click 'Assign Bid Manager' button to begin the assignment process

Line Details

Item Name	Quantity	Unit Price (USD)	Sub Total (USD)
Abacavir 60mg, Tablets, 30 Tabs	1,000	5.00	5,000.00
Atazanavir 300mg, Capsules, 30 Caps	1,000	17.00	17,000.00
Efavirenz 50mg, Capsules, 30 Caps	1,000	2.25	2,250.00

Total: USD 24,250.00

Activity log

Terms of references details

John Doe
 Approved - HOD Approved Budget Approved The Requisition is in order.

Terms of reference is not available.





Bid Manager allocation successful. 1 bid manager(s) assigned.

Assign Bid Manager to Requisition

Select Bid Manager(s), tip: Hold Control key to choose many.

- System Admin
- Procurement Specialist
- Rowland Simiyu
- Ken Shabola
- Andrew Muenenga
- Dennis Kibunja
- Emma Emma
- John Doe
- Paul N'ang'a

Step 4.1 (d) – From the list provided, choose the relevant Bid Manager. Also, give remarks justifying your selection

Bid Manager Justification(s)

Has relevant experience as Bid Manager

Assign

Step 4.1 (e) – Click the 'Assign' button to save the selection.

Bid Manager(s) Assigned

Notify All

Back

Bid Manager

Actions

Ken Shabola

Notify

Remove

Justification


Has relevant experience as Bid Manager


Once the bid manager is assigned, they will appear here. Click the 'Notify' button to send E-mail notifications.

You can delete a bid manager by clicking on the 'Remove' button



4.2 Solicitation Documents - Header

 After a BM has been assigned to a requisition, he/ she will be required to initiate the solicitation process.

 This section will show how to input data that will be visible in the Header Section of the solicitation document. Some of the fields that will be visible include:

- Procurement Title
- RFX Type (Request For Information/ Quotation/ Proposal)
- Bid Validity Period
- Solicitation Description



The Bid Manager will be required to log in to the system. Follow **Steps 2.1 (a) – 2.1 (c)** to log in.

Step 4.2 (a) – Click here to view requisitions that are assigned to you as BM.

The screenshot shows the e-Procurement dashboard. On the left is a dark sidebar with navigation options: Notifications, Catalogue, Requisitions, My List, Shopping Cart, and Assigned. The main area is titled 'Dashboard' and features a section for 'Assigned Requisitions' with a count of 5. Below this is a table with columns: ID, Reference, Project, HOD Approved, Finance Approval, Executive Director Approval, and Actions. Two rows are visible in the table, both with 'Approved' status in the HOD and Finance columns. A 'View' button is present in the Actions column for the first row. A green callout box explains that assigned requisitions appear on the dashboard and can be viewed by clicking an arrow icon. A yellow callout box points to the 'View' button, indicating it should be clicked to begin the solicitation process.

Assigned Requisitions
If you have been successfully assigned the role of Bid Manager to specific requisitions, they will appear on the dashboard. Click on the arrow to view the listing.

ID	Reference	Project	HOD Approved	Finance Approval	Executive Director Approval	Actions
ARVs37	MAUL-HSIP/MED/18/0201/04	MAUL-HSIP	Approved	Approved	Approved	View
ARVs35	MAUL-HSIP/MED/18/0201/03	MAUL-HSIP	Approved	Approved	Approved	View

The list of assigned requisitions can also be accessed here (Requisitions → Assigned)

Step 4.2 (b) – Click the 'View' button to view the requisition and begin the solicitation process

- Notifications ▼
- Catalogue ▼
- Requisitions ▼
- Solicitations Management ▼
- Evaluations ▼
- Awards ▼
- Contract Management ▼

Requisition Reference: MAUL-HSIP/MED/18/0201/04 created: 5/4/18, 3:35 PM

[Print Requisition](#)
[Add Solicitation Document](#)

<p> Created by: Ken Shabola Category: ARVs Department: Human Resource Required Date: 9/4/18 Budget: USD 24,250.00 Quarter Code: 02 Financial Year: 2018 Requisition Type: item Funding Project: MAUL-HSIP </p>	<p> HOD Approval: approved HOD Approval Date: 5/4/18, 3:36 PM Budget Approval: approved Budget Approval Date: 5/7/18, 12:18 PM Executive Director Approval: approved Executive Director Approval Date: 5/7/18, 12:27 PM </p>
---	---

Step 4.2 (c) – Click the 'Add Solicitation Document' button to begin populating information for the solicitation document.

Line Details

Item Name	Quantity	Unit Price (USD)	Sub Total (USD)
Abacavir 60mg, Tablets, 30 Tabs	1,000	5.00	5,000.00
Atazanavir 300mg, Capsules, 30 Caps	1,000	17.00	17,000.00
Efavirenz 50mg, Capsules, 30 Caps	1,000	2.25	2,250.00

Total: USD 24,250.00

Activity log

Emma Emma
Bid manager allocations - Bid managers assigned are: Shabola Ken.
 --Remarks: Has relevant experience as Bid Manager
 Created: Tuesday, May 8, 2018 at 12:50 PM

Terms of references details

Terms of reference is not available.

Bid manager(s) allocated





Notifications

Catalogue

Requisitions

Solicitations Management

Evaluations

Awards

Contract Management

+ Solicitation Document

Procurement Reference: MAUL-HSIP/MED/18/0201/04

Procurement Title * Supply of Medical Supplies - ARVs

RFX Type * Request for Quotation (RFQ)

+ New RFX Type

Bid Validity Period (Days) 180

Solicitation description

MAUL hereby invites you to submit a bid to this invitation for the above referenced object
The attached documents will be divided into various categories:
Bidding and contractual information and Returnable forms.

Submit

Step 4.2 (d)

- Enter Procurement Title
- Choose RFX Type (Quotations, Information, Proposal)
- Enter Bid Validity period
- Enter solicitation description/ background with regards to the bid.

Step 4.2 (e) – Click the Submit button to continue with preparation of the solicitation document



Solicitation Document

Document Menu ▾

Reference: MAUL-HSIP/MED/20/0301/19

Attachments

Settings

Preview Solicitation

RFx Type Request for Quotation (RFQ) ▾

+ New RFx Type

Bid Validity Period 30

Title Supply of ARVs for Financial Year 2020

Description MAUL hereby invites you to submit a bid to this invitation for the above-referenced object.
Document Information categories: Bidding and Contractual

Step 4.2 (f) – Click the **Next** button to access other preparation functionalities.

Next

Update

Other information

Method of Procurement :

These functionalities will be explained in detail in sections 4.3 and 4.4

Attachments

The attachments button will provide an area for the bid manager to upload any documents that will be sent out to Bidders.

Settings

The settings button will provide an area where the bid manager can assign procurement method, propose evaluation team, propose suppliers, and enable other settings

Preview Solicitation

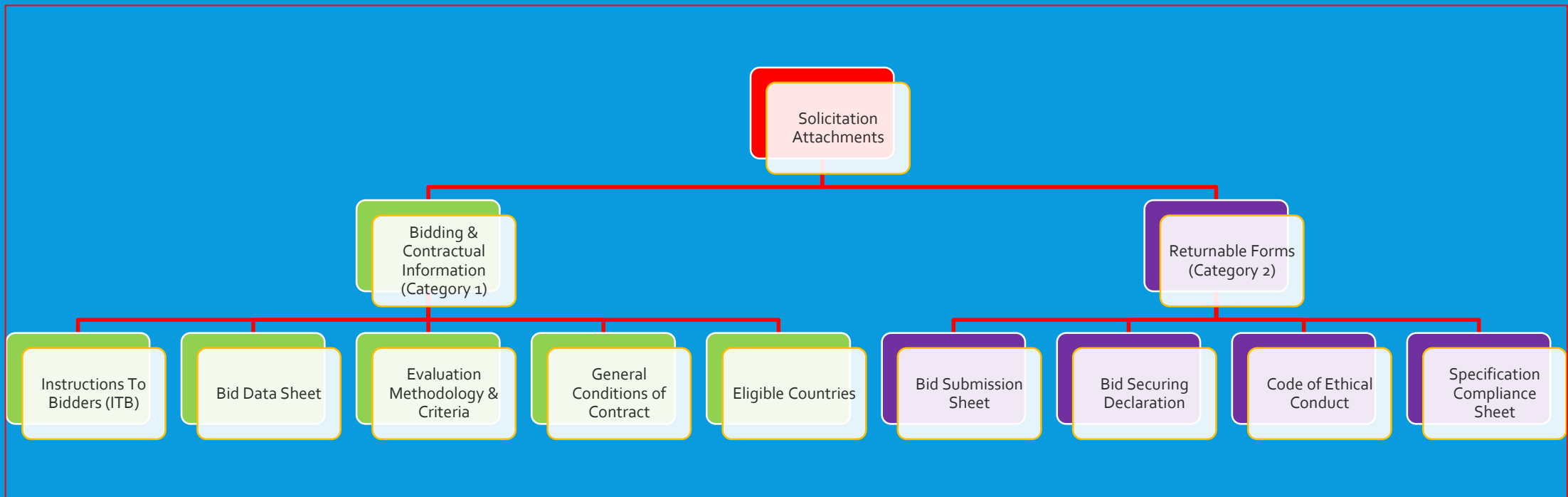
The preview button allows the bid manager to view all the solicitation document components (Attachments, statement of requirements, price schedule, shortlisted suppliers, and evaluation team). The bid manager will then make necessary changes if need arises.

4.3 Solicitation Documents - Attachments

This section deals with:

- Creation of Solicitation Document Categories
- Uploading attachments relevant to the categories

The solicitation document categories will provide a simple way for bidders to identify the documents they will be required to fill and upload back to the E-Procurement system.



Creating Solicitation Documents Categories

e-Procurement

- Notifications
- Catalogue
- Requisitions
- Solicitations Management
- Evaluations
- Awards
- Contract Management

Solicitation Document

Attachment Settings for MAUL-HSIP/MED/18/0201/04

Attachments Category	Bidding and Contractual Information
Category Order	1
Category Description	This category contains standard documents that do not need editing

Add Category

Step 4.3 (a)

- Enter the name for 'Attachments Category'
- Enter Category Order in 1,2,3, ... Format
- Input a relevant brief description for the attachments

Step 4.3 (b)

Click the 'Add Category' button to add & save the new category.

In this section, attachments will be added to the Document Category (Bidding & Contractual Information)

Solicitation Document Document Menu ▾

Attachment Settings for MAUL-HSIP/MED/20/0301/19 [Refresh](#) [Back to Solicitation](#)

Attachments Category: Bidding and Contractual Information

Category Order: 1

Category Description: This Category contains Standard Documents that do not require editing.


[Next](#) [Add Category](#)

Preview attachment categories [+ Select Attachment](#) [+ New Attachment](#)

- **Select Attachment:** This button is used to attach frequently used solicitation documents. The Procurement Specialist is responsible for saving these documents in the system. **(The Administration Module will cover the process of saving frequently used solicitation documents)**
- **New Attachment:** This button is used to attach documents that are not readily available in the system.



Adding Attachments using the Select Attachment Button.

 Solicitation Document Document Menu ▾

Attachment Settings for MAUL-HSIP/MED/20/0301/19 [Refresh](#) [Back to Solicitation](#)

Attachments Category

Category Order

Category Description

[Next](#) [Add Category](#)

Preview attachment categories

[+Select Attachment](#) [+ New Attachment](#)

1 . Bidding and Contractual Information [Edit](#) [Delete](#)

Step 4.3 (c)
Click the **Select Attachment** button to add a frequently used document that is already saved in the system

Attachment Settings for MAUL-HSIP/MED/20/0301/19

Refresh

Back to Solicitation

Attachments Category

Category Order

Category Description

Next

Add Category

Preview attachment categories

+Select Attachm

Mandatory Documents

asdasdasdas

Evaluation Methodology and Criteria

Evaluation Methodology and Criteria

Categories

Bidding and Contractual Information

Add Attachment

Step 4.3 (d)

- Select the required document from the list of Mandatory documents saved in the system.
- Select the category to which the document belong

Step 4.3 (e)

Click the Add Attachment button

1 . Bidding and Contractual Information

Edit

Delete

Adding Attachments using the New Attachment Button.

Help All times in East African Time (EAT) 15 Ken Shabola

Document Menu

Refresh Back to Solicitation

Preview attachment categories + New Attachment

Select Attachment Category Bidding and Contractual Information

File Order 1

File Name Instructions to Bidders (ITB)

Attachment Choose file No file chosen

Add Attachment

1 . Bidding and Contractual Information Edit Delete

Step 4.3 (f)

Click the **New Attachment** button to add a document.

Step 4.3 (h)

Click 'Add Attachment' button

Step 4.3 (g)

- Select the relevant document category from the drop down arrow
- Enter the file order in 1,2,3 ... Format
- Enter relevant file name
- Click **Choose File** to browse the location of your file.



IMPORTANT

Make sure your file is in PDF format



Solicitation Documents Categories and attachments View



Follow Steps 4.3 (a) – 4.3 (b) to add more categories.

Follow Steps 4.3 (c) – 4.3 (e) to attach solicitation documents that have been saved in the system

Follow Steps 4.3 (f) – 4.3 (h) to attach new solicitation documents

Attachment Settings for MAUL-HSIP/MED/20/0301/19 Refresh Back to Solicitation

Attachments Category: e.g Returnable Bidding Forms, ITB

Category Order:

Category Description: The category has fillable bidding forms

Next Add Category

Preview attachment categories +Select Attachment +New Attachment

Select Attachment Category: Bidding and Contractual Information

File Order:

File Name:

Attachment: No file chosen

Add Attachment

1 . Bidding and Contractual Information Edit Delete

1 . Evaluation Methodology and Criteria	View	Download	Edit	Remove
2 . Instruction to Bidders (ITB)	View	Download	Edit	Remove
3 . Bid Data Sheet	View	Download	Edit	Remove
4 . General Conditions of Contract	View	Download	Edit	Remove
5 . Eligible Countries	View	Download	Edit	Remove

Step 4.3 (i)
Click the **Next** button to configure other solicitation document settings.

Once all the categories have been created and linked to various document attachments, they will appear as shown.



Solicitation Documents Editing

In case you may want to edit your solicitation document, or continue from where you left off, the system has provided a document menu from where you can edit solicitation information. **See image below**

Navigation: On the Main Navigation Menu Go to (Requisitions → Assigned → Locate the relevant requisition in the list → Click View button → View Solicitation → Document Menu → Edit Solicitation)

The screenshot shows the 'Solicitation Document' page. At the top left, there is a document icon and the title 'Solicitation Document'. Below this, the reference number 'Reference: MAUL-HSIP/MED/18/0201/04' is displayed. The page is divided into two columns of information. The left column contains fields for 'Created', 'Request Type', 'Bid Validity Period', 'Bidding Period', and 'Issue Date'. The right column contains 'Procurement Method', 'Procurement Agency Approval', and 'PAC Approval'. A green callout box points to a 'Document Menu' dropdown in the top right corner, which is highlighted in yellow. The dropdown menu is open, showing options for 'View Requisition' and 'Edit Solicitation'. A green 'Submit to' button is also visible next to the dropdown.

Click on the 'Document Menu' drop down and select 'Edit Solicitation'

Document Menu

- View Requisition
- Edit Solicitation

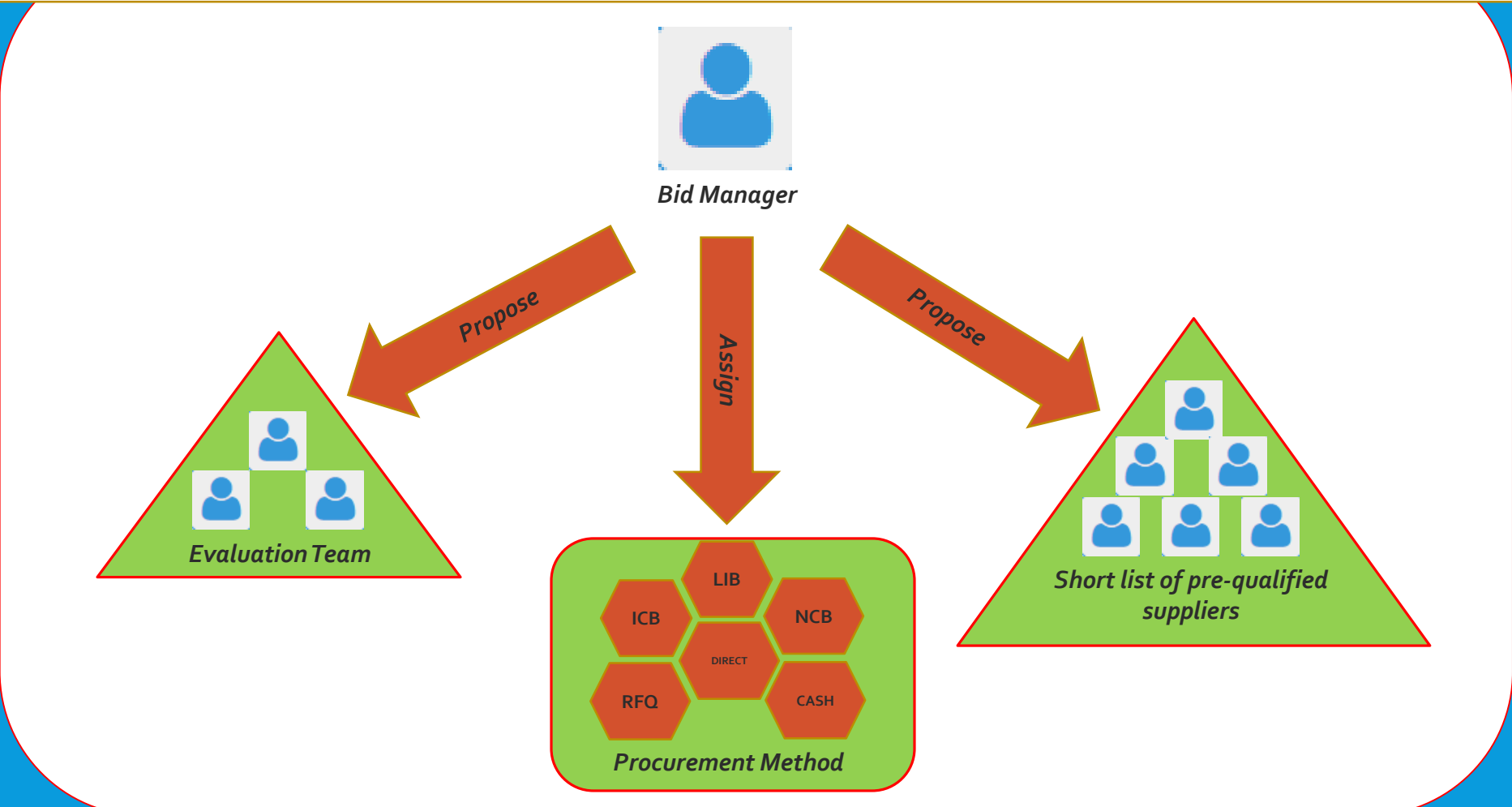
Submit to

Created	5/10/18, 2:27 PM	Procurement Method	
Request Type	Request for Quotation (RFQ)	Procurement Agency Approval	pending
Bid Validity Period	180 days	PAC Approval	pending
Bidding Period	days		
Issue Date	System generated date		



4.4 Solicitation Documents - Settings

This section deals with the assignment of evaluation team, procurement method, pre-qualified suppliers, and other relevant settings



4.4.1 Evaluators Selection

Step 4.4.1 (a)

After completing Step 4.3 (i), click on the **Select Evaluators** section to begin the evaluator selection process.

Step 4.4.1 (b)

Select evaluators from the list of MAUL PA staff provided.

Step 4.4.1 (c)

Save Evaluators.

Solicitation S... for MAUL-HSIP/MED/18/0201/04

Document Menu ▾

← Back to Solicitation

Select Evaluators

Select Procurement Method

Select Suppliers

Solicitation Settings

Select Evaluator(s), tip: Hold Control key to choose many.

- System Admin
- Procurement Specialist
- Rowland Simiyu
- Ken Shabala
- Andrew Muhenda**
- Donna Akanya
- Emma Emma
- John Doe
- Paul N'land'a

Save Evaluators

Evaluators Assigned

#	Evaluator	Reason	Assigned Date	Actions
---	-----------	--------	---------------	---------



Solicitation Settings for MAUL-HSIP/MED/18/0201/04

Refresh

Back to Solicitation

Select Evaluators

Select Procurement Method

Select Suppliers

Solicitation Settings

Select Evaluator(s), tip: Hold Control key to choose many.

System Admin
Procurement Specialist
Rowland Simiyu
Ken Shabola
Andrew Muhenda
Dennis Kibunja
Emma Emma
John Doe
Paul Nd'ang'a

Save Evaluators

Step 4.4.1 (e)

Click the 'Edit' button to add justification details for your evaluator choice/ selection.

Evaluators Assigned

#	Evaluator	Reason	Assigned Date	Actions
1	Andrew Muhenda		14-05-2018 13:03:25	Edit Delete



To add more evaluators, follow **Steps 4.4.1 (a) to 4.4.1 (d)**

Note: You can also select more than one evaluator by Holding the control key and selecting the required evaluators.



Solicitation Settings for MAUL-HSIP/MED/18/0201/04

[Refresh](#) [Back to Solicitation](#)

Select Evaluators

Select Procurement Method

Select Suppliers

Solicitation Settings

Editing **Andrew Muhenda** reason for selection

Reason for selection

Update

Step 4.4.1 (f)
Enter a brief reason as to why the specific evaluator has been selected.

Step 4.4.1 (g)
Click the 'Update' button to save justification details.

Evaluators Assigned

#	Evaluator	Reason	Assigned Date	Actions
1	Andrew Muhenda		14-05-2018 13:03:25	Edit Delete



IMPORTANT

1. Evaluators are notified of their roles via Email and System Notifications in the E-Procurement system
2. The bid manager is an automatic evaluator and therefore does not need to be selected in the list of MAUL PA Staff.



4.4.2 Procurement Method Selection

Solicitation Settings for MAUL-HSIP/MED/20/0301/19

Refresh Back to Solicitation

Select Evaluators Select Procurement Method Select Suppliers Solicitation Settings

Select Evaluator(s), tip: Hold Control key to choose many.

Step 4.4.2 (a)
Click the Next button to select a Procurement Method Relevant to this procurement process.

System Admin
Procurement Specialist
Rowland Simiyu
Ken Shabola
Andrew Muhenda
Dennis Kibunja
Emma Emma
John Doe
Paul N'lang'a

Next Save Evaluators

Evaluators Assigned

#	Evaluator	Reason	Assigned Date	Actions
1	Andrew Muhenda	Has Relevant Experience	19-09-2020 12:23:21	Edit Delete
2	Emma Emma	Has relevant experience	19-09-2020 12:28:29	Edit Delete

Solicitation Document

Document Menu ▾

Solicitation Settings for MAUL-HSIP/MED/20/0301/19

Select Evaluators

Select Procurement Method

Select Suppliers

Solicitation Settings

Procurement Method

Limited International Bidding

Method justification

The procurement method is in accordance with MAUL's Procurement Policies and Procedures.

Next

Save

← Back to Solicitation

Step 4.4.2 (b)


- Click the drop down to Select Procurement Method
- Enter the justification details for your procurement method selection

Step 4.4.2 (c)

Click the 'Save' button.
Click on the **Next** button to Select Pre-Qualifies Suppliers.



4.4.3 Pre-Qualified Suppliers/ Bidders Selection

 Solicitation Document Document Menu ▾

Solicitation Settings for MAUL-HSIP/MED/20/0301/19

[Refresh](#) [Back to Solicitation](#)

Select Evaluators

Select Procurement Method

Select Suppliers

Solicitation Settings

Shortlist

Dummy Supplier

Dummy Supplier Ltd

EIM Solutions

Tims Company

[Next](#) [Save Bidders](#)

Step 4.4.3 (a)

Select preferred suppliers.

Note:

To select multiple suppliers, press Ctrl + Select the suppliers. Bidders who have not been pre-qualified will not appear in the list below.

Step 4.4.3 (b)

Click **Save Bidders** button

Click the **Next** button



4.4.4 Solicitation Settings

Solicitation Document Document Menu ▾

Solicitation Settings for MAUL-HSIP/MED/20/0301/19 [Refresh](#) [Back to Solicitation](#)

Select Evaluators	Public Bids Opening <input checked="" type="checkbox"/>	Require Price Benchmarking <input checked="" type="checkbox"/>
Select Procurement Method	Approval Before Financial Opening <input checked="" type="checkbox"/>	Nominate Pac Member To Authorize Bids Opening <input type="text" value="Rowland Simiyu"/>
Select Suppliers	Save Settings Next	
Solicitation Settings		

Step 4.4.4 (a)

Click **Save Settings** button
Click the **Next** button

1. **Public Bids Opening** – Bid opening is done at the time and place as advertised by MAUL. Information about bidders is read out to those in attendance. This information includes: name of bidders, presence/ absence of bid security, total price of bid, and currency.
2. **Approval Before Financial Opening** – This is approval from PAC members to open the financial bids after the other stages (Preliminary, Commercial, and technical evaluations) have been completed.
3. **3rd Party Pre-Award Approval** – This setting will allow the procurement funding partner to approve awards before they get shared with the suppliers.
4. **Require Price Benchmarking** – The MAUL procurement team benchmarks the bidders' prices with other market rates and checks for variances.
5. **Nominate PAC Member to Authorize Bids Opening** – Select a PAC (Procurement Adjudication Committee) member to be present and authorize bids opening.



4.4.5 Generate Statement of Requirements

The statement of supplies has been generated successfully

Statement of Requirements

[Reset Requirements](#)

Define Lots?

[Activate Lots](#)

You can decide to reverse the generation of a statement of requirements and create a new one. Click on the **Reset Requirements** button to apply this function.

Rows assigned to Lot

Statement of Requirement

#	Item Name	Size		Specifications	Actions
1	Abacavir 60mg, Tablets, 30 Tabs	30	1,000		Edit Edit Specifications
2	Efavirenz 50mg, Capsules, 30 Caps	30	1,000		Edit Edit Specifications
3	Atazanavir 300mg, Capsules, 30 Caps	30	1,000		Edit Edit Specifications

You can decide to divide this procurement into smaller lots to make it more favorable to bidders. This is optional

[Next Generate Price Schedule](#) [Got to Solicitation after Generating Price Schedule](#)



The statement of supplies has been generated successfully.

Statement of Requirements

Reset Requirements

Activate Lots

Define Lots?

Lots

Statement of Requirements Details

#	Item Name	Pack Size	Quantity	Additional Information / Specifications	Actions
1	Abacavir 60mg, Tablets, 30 Tabs	30	1,000		<p>Edit</p> <p>Edit Specifications</p>
2	Efavirenz 50mg, Capsules, 30 Caps	30	1,000		<p>Edit</p> <p>Edit Specifications</p>
3	Atazanavir 300mg, Capsules, 30 Caps	30	1,000		

Step 4.4.5 (a)

The Edit button allows you to enter the desired quantities. In case of a change in quantities.

Note:

The quantities in the original requisition will remain the same.

Next Generate Price Schedule

Got to Solicitation after Generating Price Schedule

Edit the Statement of requirement row

Product Name

Abacavir 60mg, Tablets, 30 Tabs

Quantity

1000

Update

Close

The statement of supplies has been generated successfully.

Statement of Requirements

Reset Requirements

Activate Lots

Define Lots?

Lots

Rows assigned to Lot

Statement of Requirements Details

#	Item Name	Pack Size	Quantity	Additional Information / Specifications	Actions
1	Abacavir 60mg, Tablets, 30 Tabs	30	1,000		Edit Edit Specifications
2	Efavirenz 50mg, Capsules, 30 Caps	30	1,000		Edit Edit Specifications
3	Atazanavir 300mg, Capsules, 30 Caps	30	1,000		Edit Edit Specifications

Step 4.4.5 (b)

The Edit Specifications button allows you to enter additional information about an item.

Next Generate Price Schedule

Got to Solicitation after Generating Price Schedule



Additional Information / Specifications



Viewing / Editing Abacavir 60mg, Tablets, 30 Tabs - specifications

Add New

Label

Additional Information / Specifications

Step 4.4.5 (c)

Click the **Add New** button to enter additional information about a specific item.

Close

Add more information / specifications



Label

Abacavir 60mg, Tablets, 30 Tabs

Specification / Content

This drug can come in 20 Tabs or in 30 Tabs

Step 4.4.5 (d)

Enter the **Label** in the field provided.
Enter the **Specification** details



Submit

Step 4.4.5 (e)

Click the **Submit** button to complete the process

Repeat to edit the details of the other **Steps 4.4.5 (a) – 4.4.5 (e)** to edit details of the items in the statement of supplies.

Statement of Requirements

Reset Requirements

Define Lots?

Activate Lots

Lots

Rows assigned to Lot

Statement of Requirements Details

#	Item Name	Pack Size	Quantity	Additional Information / Specifications	Actions
1	Abacavir 60mg, Tablets, 30 Tabs	30	1,000	Abacavir 60mg, Tablets, 30 Tabs come in 20 Tabs	<p>Edit</p> <p>Edit Specifications</p>
2	Efavirenz 50mg, 30 Caps				<p>Edit</p> <p>Edit Specifications</p>
3	Atazanavir 300mg, 30 Caps				<p>Edit</p> <p>Edit Specifications</p>


Step 4.4.5 (f)

- Click the **Next Generate Price Schedule** button.
- After that, click the **Go to Solicitation after Generating Price Schedule** button.




Next Generate Price Schedule

Got to Solicitation after Generating Price Schedule


4.4.6 Generate Price Schedule

 Solicitation Document

Reference: MAUL-HSIP/MED/18/0201/06

Price Schedule Management   

Step 4.4.6 (a)
Click **Price Schedule Management** to configure the fields that will appear in the price schedule

RFx Type Request for Quotation (RFQ)  **+ New RFx Type**

Bidding Period 14 In days

Bid Validity Period 31

Title Supply of ARVs

Description Maul hereby invites you to submit a bid to this invitation for the above referenced object.
Please find attached documents for the bid. Download, fill and upload returnable documents

Update

Other information

Method of Procurement : Limited International Bidding



Price Schedule Management

[Refresh](#) [Back to Solicitation](#)

Solicitation Reference: MAUL-HSIP/M

Generated by : Ken Shabola

Created date : Thursday, June 28, 2018 3:09 PM East Africa Time

The **Price Schedule Details** section shows the price schedule before more columns have been added.

- Price schedule details
- Incoterms and other details
- Price Schedule Configuration

#	Item Code	Description	Quantity
1	110010	Efavirenz 50mg, Capsules, 30 Caps	1000
2	110001	Abacavir 60mg, Tablets, 30 Tabs	1000
3	110007	Atazanavir 300mg, Capsules, 30 Caps	1000



Price Schedule Management

Solicitation

Solicitation Reference: MAUL-HSIP/MED/20/030

Generated by : Ken Shabola

Created date : Saturday, September 19, 2020 at 2

Step 4.4.6 (b)
Click **Define Price Schedule Attributes** section to view and add price schedule columns that will be used by bidders

Step 4.4.6 (c)
Click **New Attribute** to add a new column to the price schedule.

+ New Attribute

- Price schedule Output
- Define Price Schedule Attributes**
- Configure Price Schedule

#	Name	Description	Input Type	Actions
1	Unit DDP Price (USD)	Delivered Duty Paid - DDP	decimal	Edit Delete
2	FOB CIP Price	Free On Board - FOB	decimal	Edit Delete
3	Unit Price CIP Road Kla	Carriage and Insurance Paid To (CIP) Kampala	decimal	Edit Delete
4	Supplier Pack Size	Supplier Pack Size	integer	Edit Delete
5	Unit Price CIF	Unit Price CIF	decimal	Edit Delete
6	Lead Time Air Weeks	Lead time air in weeks	integer	Edit Delete
7	Lead Time Sea Weeks	Lead Time Sea Weeks	integer	Edit Delete

Note

1. The Bid Manager is able to add new columns to the price schedule that are relevant to this solicitation document by using the '**New Attribute**' functionality.
2. You cannot delete columns that have been used in other transactions. You can only edit the Description details of these columns
3. To change the Name of an attribute say from '**FOB Price**' to '**Unit Price FOB**', use the **Configure Price Schedule** feature.



Price Schedule Management

[Refresh](#) [Back to Solicitation](#)

Solicitation Reference: MAUL-HSIP/MED/18/0201/06

Generated by : Ken Shabola

Created date : Thursday, June 28, 2018 at 3:48:09 PM East Africa Time

[+ New Attribute](#)

- Price schedule details
- Incoterms and other details
- Price Schedule Configuration

Name	Pack Size
Description	Pack Size
Expected Input Type	<ul style="list-style-type: none">integerintegertextdecimalstring

Step 4.4.6 (e)
Click 'Add' to add the attribute.

[Add](#)

Step 4.4.6 (d)

- Enter the Column Name
- Enter the Description
- Enter the input type

Note
Integer types are for whole numbers, text types allow as many characters as possible, decimal types are for decimal numbers, and string types allow a limited number of characters.

The attribute has been added successfully.



Price Schedule Management

[Refresh](#) [Back to Solicitation](#)

Solicitation Reference: MAUL-HSIP/MED/20
Generated by : Ken Shabola
Created date : Saturday, September 19, 2020

Step 4.4.6 (f)
Click **Define Price Schedule Attributes** to refresh the page and view the new attribute.

- Price schedule Output
 - Define Price Schedule Attributes**
 - Configure Price Schedule

[+ New Attribute](#)

#	Name	Description	Input Type	Actions
1	Unit DDP Price (USD)	Delivered Duty Paid - DDP	decimal	Edit Delete
2	FOB CIP Price	Free On Board - FOB	decimal	Edit Delete
3	Unit Price CIP Road Kla	Carriage and Insurance Paid To (CIP) Kampala	decimal	Edit Delete
4	Supplier Pack Size	Supplier Pack Size	integer	Edit Delete

The new attribute will appear here.



Price Schedule Management

Solicitation Reference: MAUL-HSIP/MED/20/0

Generated by : Ken Shabola

Created date : Saturday, September 19, 2020

Price schedule Output

Define Price Schedule Attributes

Configure Price Schedule

Step 4.4.6 (g)

Click **Configure Price Schedule** to select columns that will appear in the price schedule and also change the naming conventions of some of the columns.

Step 4.4.6 (h)

Select the fields that will appear in the price schedule from the list provided. To select multiple fields, long press CTRL button and select the various fields you want.

Note

These fields have been created using the **New Attribute** functionality described earlier.

Submit

Step 4.4.6 (i)

Click the **Submit** button to add the selected fields

Selected price schedule template fields

Name	Alias	Visible to Suppliers	Supplier Can Edit?	Total Field Required	Order Position	Expected Input Type	Actions
------	-------	----------------------	--------------------	----------------------	----------------	---------------------	---------

- Percentage Clearance Fees
- Pack Size
- Domestic costs and Tax
- Unit DDP Price (USD)
- Example 2
- Lead Time Sea Weeks
- ExWorks
- Unit Price CIF Ebb
- Landed Cost



Solicitation Reference: MAUL-HSIP/MED/20/0301/19

Generated by : Ken Shabola

Created date : Saturday, September 19, 2020

Step 4.4.6 (j)
 Click the **Configure Price Schedule** section to refresh the page and view the fields that have been selected.

- Price schedule Output
- Define Price Schedule Attributes
- Configure Price Schedule**

Schedule

- Percentage Clearance Fees
- Pack Size
- Domesting costs and Tax
- Unit DDP Price (USD)
- Example 2
- Lead Time Sea Weeks
- ExWorks
- Unit Price CIF Ebb
- Landed Cost

Submit

Selected fields will appear here.

Selected price schedule template fields

#	Name	Alias	Visible to Suppliers	Supplier Can Edit?	Total Field Required	Order Position	Expected Input Type	Actions
1	Lead Time Air Weeks		No	No	No		integer	Edit Delete
2	Lead Time Sea Weeks		No	No	No		integer	Edit





You can use the Price Schedule Configuration area to perform the following activities:

1. Configure the numerical order in which selected fields will appear in the price schedule
2. Change the naming conventions of the fields using the **Edit** functionality. For Example from 'FOB Price' to 'Unit Price FOB'
3. Delete fields that are not needed

Selected price schedule template fields

#	Name	Alias	Visible to Suppliers	Supplier Can Edit?	Total Field Required	Order Position	Expected Input Type	Actions
1	Lead Time Air Weeks		No	No	No		integer	 
2	Lead Time Sea Weeks		No	No	No		integer	 
3	Unit DDP Price (USD)		No	No	No		decimal	 
4	Unit FOB (USD)		No	No	No		decimal	 
5	Unit Price CIF		No	No	No		decimal	 
6	Pack Size		No	No	No		string	 

Step 4.4.6 (k)

Click the **Edit** button to edit the details of the fields that will appear in the Price Schedule.

Price Schedule Management

Refresh

Back to Solicitation

Solicitation Reference: MAU

Generated by : Ken Shabola

Created date : Saturday, Sept

Step 4.4.6 (n)

Click on the 'Price Schedule Configuration' area to refresh the page and see edited changes.

Price schedule Output

Define Price Schedule Attributes

Configure Price Schedule

Africa Time

Current Field Name Pack Size

Alias (Overrides Current Field Name)

Change the position 1

Visible to Suppliers

Suppliers Can Edit

Requires Total Field

Arithmetic Function -- Select --

Arithmetic -- Select --

-- Select --

Step 4.4.6 (m)

Click the Update button to complete the editing process.

Update

Step 4.4.6 (l)

- You cannot change the current field name
- Enter an Alias name to change the current field name. The Alias name will be visible in this particular Price Schedule instead of the current field name
- Enter the order position the field will appear
- Tick the check box to enable **Visible to suppliers**. When this is enabled, the suppliers will be able to view the field when they are populating the Price Schedule.
- Tick the check box to enable Suppliers Can Edit. This will allow suppliers to enter their prices during the bidding stage.



Solicitation Reference: MAUL-HSIP/MED/20/0301/19

Generated by : Ken Shabola

Created date : Saturday, September 19, 2020 at 2:32:47 PM East Africa Time

Price schedule Output

Define Price Schedule Attributes

Configure Price Schedule

Current Field Name Unit DDP Price (USD)

Alias (Overrides Current Field Name)

Change the position 5

Visible to Suppliers

Suppliers Can Edit

Requires Total Field

Arithmetic Function -- Select --

Arithmetic -- Select --

-- Select --

The **Require Total Field** is an inbuilt function that multiplies the selected Price (In this case DDP Price) with the quantity of the items being procured. The system will create a new column in the price schedule to show the calculated product.

Update



Current Field Name

Unit DDP Price (USD)

Alias (Overrides Current Field Name)

Change the position

5

Visible to Suppliers



Suppliers Can Edit



Requires Total Field



Arithmetic Function

-- Select --

Arithmetic

-- Select --

-- Select --

Update

The **Arithmetic Function** is an inbuilt function. There are two (2) types of functions: **Sum** and **Multiplication**. The **Arithmetic** section allows a user to select the columns that will be summed or multiplied





Once you have edited the fields. The **Selected Price Schedule Template Fields** area should look like the image shown below.

Selected price schedule template fields								
#	Name	Alias	Visible to Suppliers	Supplier Can Edit?	Total Field Required	Order Position	Expected Input Type	Actions
1	Pack Size		Yes	No	No	1	string	Edit Delete
2	Unit FOB (USD)		Yes	No	No	2	decimal	Edit Delete
3	Unit CIP Air (USD)		Yes	No	No	3	decimal	Edit Delete
4	Unit Price CIF		Yes	No	No	4	decimal	Edit Delete
5	Unit DDP Price (USD)		Yes	No	Yes	5	decimal	Edit Delete
6	Lead Time Air Weeks		Yes	No	No	6	integer	Edit Delete
7	Lead Time Sea Weeks		Yes	No	No	7	integer	Edit Delete



Solicitation Document

Document Menu ▾

Price Schedule Manager

Refresh

Back to Solicitation

Solicitation Reference: MAUL

Generated by : Ken Shabola

Created date : Saturday, Sep 11, 2010 10:00 AM

Step 4.4.6 (o)

Click the **Price Schedule Output** area to refresh the page and view the fields that have been edited.

Price schedule Output

Define Price Schedule Attributes

Configure Price Schedule

#	Item Code	Description	Pack Size	Quantity	Pack Size	Unit FOB (USD)	Unit CIP Air (USD)	Unit Price CIF	Unit DDP Price (USD)	Lead Time Air Weeks	Lead Time Sea Weeks	Actions
1	110010	Efavirenz 50mg, Capsules, 30 Caps	30	1000								Edit
2	110001	Abacavir 60mg, Tablets, 30 Tabs	30	1000								Edit
3	110007	Atazanavir 300mg, Capsules, 30 Caps	30	1000								Edit

Step 4.4.6 (p)

Click the **Back To Solicitation** button to view the solicitation document.



Step 4.4.6 (q)

Click the **Preview Solicitation** to view the solicitation document.

Reference: MAUL-HSIP/MED/18/0201/06

Price Schedule Management

Attachments

Settings

Preview Solicitation

Rfx Type

Request for Quotation (RFQ)

+ New Rfx Type

Bidding Period

14

In days

Bid Validity Period

31

Title

Supply of ARVs

Description

Maul hereby invites you to submit a bid to this invitation for the above referenced object.
Please find attached documents for the bid. Download, fill and upload returnable documents

Update

Other information


Method of Procurement : Limited International Bidding

The Bid Manager is able to edit the **Bidding Period, Bid Validity, Title, and Description** at this point.
Click the **Update** button to save any changes made.



4.4.7 Solicitation Documents View

 After completing input of data and settings as defined in the steps under section 4.0 (Preparing Solicitation Documents), your Solicitation Document will contain the details below

-  • **Header** – Some of the information contain in the header section include: Creation Date, Request type, Bid validity period, bidding period, and procurement method
- **Description** – This is a brief description about the bid to help bidders gain understanding.
- **Evaluation team**
- **Shortlisted Suppliers**
- **Solicitation Attachments**
- **Statement of Requirements**
- **Price Schedule**
- **Solicitation Document Review and Approval Details** – When the Bid Manager is confident that the Solicitation Document has the relevant and required information, he/she can send it to the PA HOD or PA Specialist for review before submission to the PAC Team for approval. The review and approval feedback will appear here



Reference: MAUL-HSIP/MED/18/0201/04

Submit to Procurement Agency

Created	5/10/18, 2:27 PM
Request Type	Request for Quotation (RFQ)
Bid Validity Period	180 days
Bidding Period	14 days
Issue Date	System generated date
Quotation Submission Date	
Bid Opening Date	

Procurement Method	Limited International Bidding
Procurement Agency Approval	pending
PAC Approval	pending

Solicitation Document Header Details

Description

MAUL hereby invites you to submit a bid to this invitation for the above referenced object
The attached documents will be divided into various categories: Bidding and contractual information and Returnable forms.

Solicitation Document Description Details.

Evaluation Team

Name
Andrew Muhenda
Emma Emma

Solicitation Document Evaluation Team Details.



Shortlisted Suppliers

Provider Name	Reason for Selection	Confirmed Receipt	Confirmed Participation	Date & time Confirmed
EIM Solutions	EIM Solutions is a qualified bidder.	No	Pending	
Dummy Supplier	Qualified as test supplier.	No	Pending	

Solicitation Document
Shortlisted Supplier
Details

Solicitation Attachments

Bidding and Contractual Information

Instructions to Bidders (ITB)

[View](#)

[Download](#)

Bid Form

[View](#)

[Download](#)

Evaluation Methodology and Criteria

[View](#)

[Download](#)

Conditions of Contract

[View](#)

[Download](#)

Eligible Countries

[View](#)

[Download](#)

Solicitation Document
Categories &
Attachments Details

Returnable/ Editable Forms



Statement of Requirements

#	Product	Quantity
1	Abacavir 60mg, Tablets, 30 Tabs	1,000
2	Efavirenz 50mg, Capsules, 30 Caps	1,000
3	Atazanavir 300mg, Capsules, 30 Caps	1,000

Solicitation Document
Statement of
Requirement Details

Price Schedule

#	Item Name	Quantity	Unit Price FOB	Unit Price CIP Air EBB	Total FOB Price
1	Efavirenz 50mg, Capsules, 30 Caps	1000			
2	Abacavir 60mg, Tablets, 30 Tabs	1000			
3	Atazanavir 300mg, Capsules, 30 Caps	1000			

Solicitation Document
Price Schedule Details

Solicitation Document
Approval Details

Solicitation Review and Approval



Solicitation Document

Reference: MAUL-HSIP/MED/18/0201/04

Created	5/10/18, 2:27 PM
Request Type	Request for Quotation (RFQ)
Bid Validity Period	180 days
Bidding Period	14 days
Issue Date	System generated date
Quotation Submission Date	
Bid Opening Date	

Description

MAUL hereby invites you to submit a bid to this invitation for the above referenced object
The attached documents will be divided into various categories: Bidding and contractual information and Returnable forms.

Evaluation Team

Name
Andrew Muhenda

Step 4.4.7 (a)
Click **Submit to Procurement Agency**.

This solicitation document will be sent to PA HOD and the PA Specialist for review

Document Menu ▾

Submit to Procurement Agency

Procurement Method	Limited International Bidding
Procurement Agency Approval	pending
PAC Approval	pending



Solicitation submission to PA, ref: MAUL-HSIP/MED/18/0201/06

◀ Back to Solicitation

Remarks

Please review the SBD and give feedback. Thanks

Submit

Step 4.4.7 (c)

Click the 'Submit' button to submit the SBD to the PA HOD and PA Specialist.

Step 4.4.7 (b)

Enter brief remarks in the area provided.

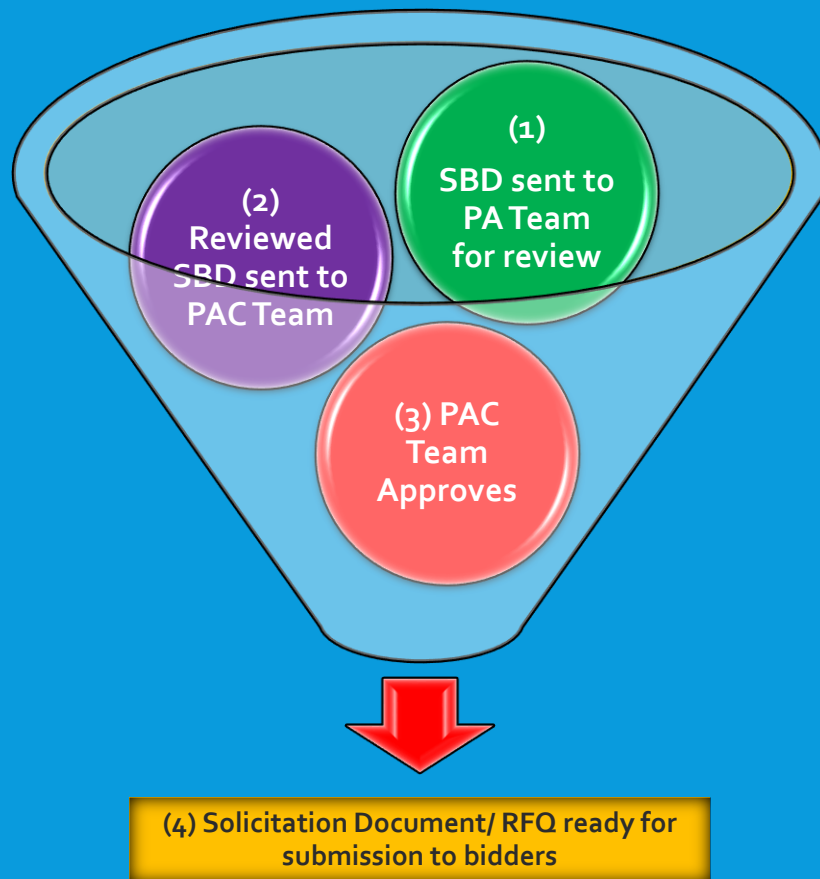
procurement.spinprocure.com says

The bid solicitation has been submitted to PA successfully.

OK



4.5 Solicitation Documents – Review & Approval



After the Bid Manager has entered all the required and relevant information contained in the solicitation document, he/ she can submit it to the PA HOD/ PA Specialist for review.

SBD Reviews can be done by the PA HOD or the PA Specialist; both will be notified via email and also via the system notification functionality in the E-Procurement system.

Reviewers will be able to view the contents of the solicitation document and give feedback to the Bid Manager in case of adjustments. If the solicitation document is in order, it is forwarded to the (Procurement Adjudication Committee) PAC members for approval before being sent out to pre-qualified bidders by the PA Team.

4.5.1 Solicitation Document Review By PA HOD or PA Specialist



The PA HOD or PA Specialist will be required to log in to the E-Procurement system

User logged in as Procurement Specialist.

You can also access solicitation documents that are pending approval via system notifications.

The screenshot shows the e-Procurement system interface. On the left is a dark sidebar with navigation items: Notifications, Configure Procurement, Catalogue, Suppliers Management, Requisitions, Solicitations Management, and Other Approvals. The main area is a light grey dashboard with two sections: 'Requisitions Pending Bid Manager Assignment' (1) and 'Solicitations Pending Approval' (1). The 'Solicitations Pending Approval' section contains a table with one row of data. The table has columns for '#', 'Created Date', 'Reference', 'Procurement Approval', and 'Actions'. The 'Actions' column for the first row contains a 'View' button. A green callout points to the 'Notifications' menu item. A green callout points to the user name 'Procurement Specialist' in the top right. A yellow callout points to a dropdown arrow in the table header. Another yellow callout points to the 'View' button. A green callout at the bottom explains that pending solicitations appear on the dashboard.

#	Created Date	Reference	Procurement Approval	Actions
1	5/10/18, 2:27 PM	MAUL-HSIP/MED/18/0201/04	Pending	View

Step 4.5.1 (a)

Click the drop down arrow to see the list of solicitation documents that are pending approval.

Solicitation documents that are pending approval will appear automatically on the Procurement Specialist's Dashboard.

Step 4.5.1 (b)

Click the 'View' button to view the contents of the solicitation document.



Reference: MAUL-HSIP/MED/18/0201/04

Created	5/10/18, 2:27 PM	Procurement Method	Limited International Bidding
Request Type	Request for Quotation (RFQ)	Procurement Agency Approval	pending <input checked="" type="checkbox"/> Solicitation Document Review
Bid Validity Period	180 days	PAC Approval	pending
Bidding Period	14 days		
Issue Date	System generated date		
Quotation Submission Date			
Bid Opening Date			

Step 4.5.1 (c)
Click 'Solicitation Document Review' to open the review window.

Description

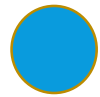
MAUL hereby invites you to submit a bid to this invitation for the above referenced object
The attached documents will be divided into various categories: Bidding and contractual information and Returnable forms.

Evaluation Team

Name
Andrew Muhenda
Emma Emma



Rejecting a Solicitation Document During Review by PA Team



The PA HOD or PA Specialist can recommend adjustments for a solicitation document before submission to the PAC members. Below is an example of a rejected SBD.

Solicitation Document

Solicitation Review, ref: MAUL-HSIP/MED/18/0201/04

[Refresh](#) [Back to Solicitation](#)

Solicitation review Send to Bid Manager


Comments Solicitation Documents has been reviewed. Amendments are attached

Attachment Choose file SOLICITATION DOCUMENTS.pdf

[Submit](#)

Step 4.5.1 (d)

- Solicitation Review - Click the drop down arrow and select 'Send to Bid Manager'
- Comments – Enter relevant remarks explaining your selection/ choice above
- Attach files that have the amendments or recommendations for the Bid Manager to incorporate.

 **IMPORTANT**

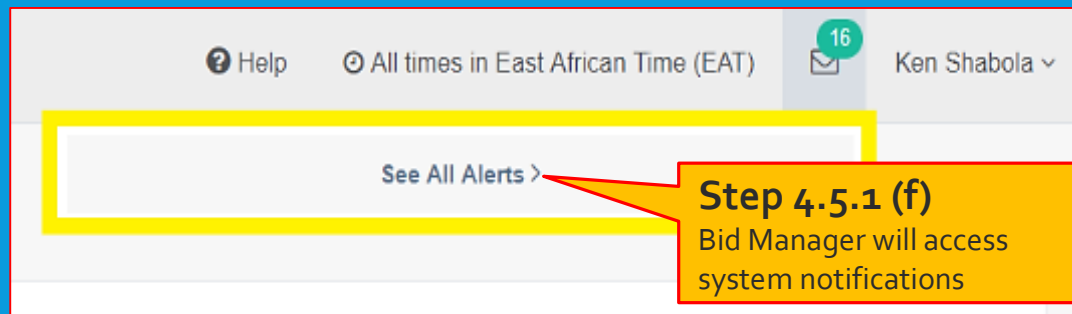
Make sure your file is in PDF format

Step 4.5.1 (e)

Click the 'Submit' button to return the SBD back to the bid manager

 The Bid Manager will be notified via E-mail and also through the E-Procurement system notifications on the review status of the SBD/ RFQ. If there are adjustments to be made, the Bid Manager will be required to do the following:

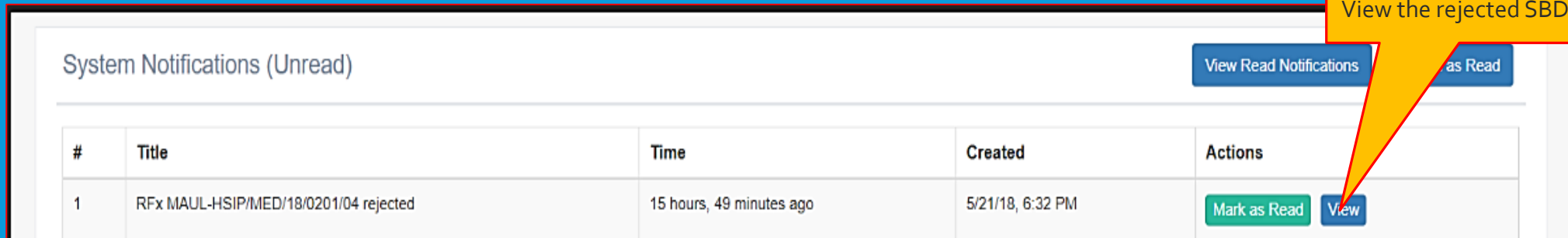
1. Log into the system
2. Access system notifications (Step 4.5.1 (f))
3. View the rejected solicitation document (Step 4.5.1 (f) – (g))
4. Edit Solicitation Document (Step 4.5.1 (h))
5. Re-submit the solicitation document to the PA Team (Step 4.5.1 (i))



Help All times in East African Time (EAT) 16 Ken Shabola

See All Alerts >

Step 4.5.1 (f)
Bid Manager will access system notifications



System Notifications (Unread) View Read Notifications Mark as Read

#	Title	Time	Created	Actions
1	RFx MAUL-HSIP/MED/18/0201/04 rejected	15 hours, 49 minutes ago	5/21/18, 6:32 PM	Mark as Read View

Step 4.5.1 (g)
View the rejected SBD



Step 4.5.1 (h)

View the Document

Note: Once the SBD opens, scroll down and see the recommendations given by PA HOD/ PA Specialist

MAUL-HSIP/MED/18/0201/04 rejected

Procurement agency has rejected the MAUL-HSIP/MED/18/0201/04 RFx.

[View Procurement](#) [Mark as Read](#)

Step 4.5.1 (i)

Click **Document Menu** → **Edit Solicitation document**

Amend the solicitation document as requested before re-submitting to PA HOD/ PA Specialist

Solicitation Document **Document Menu** ▾

Reference: MAUL-HSIP/MED/18/0201/04 [Submit to Procurement Agency](#)

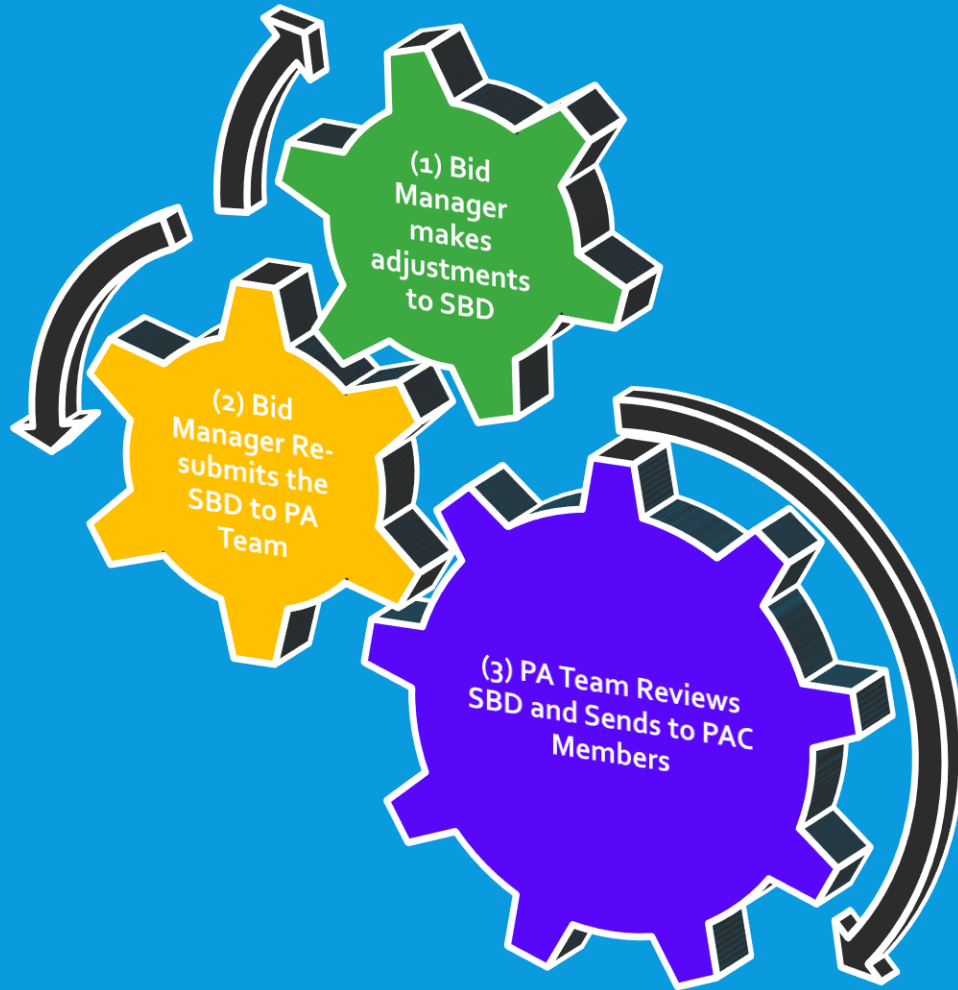
Created	5/10/18, 2:27 PM	Procurement Method	Limited International Bidding
Request Type	Request for Quotation (RFQ)	Procurement Agency Approval	Changes requested on 5/21/18, 6:32 PM
Bid Validity Period	180 days	PAC Approval	pending

Step 4.5.1 (j)

Re-submit the amended SBD to the PA Team



Approving an amended Solicitation Document During Review by PA Team



After the Bid Manager applies the required changes, he/ she will submit the SBD back to the PA Team for another review. If the PA HOD or PA Specialist is satisfied with all the contents of the document, it is then sent to the PAC Members.

The Bid Manager will be notified via E-mail and through the E-Procurement system notifications functionality on the review status of the SBD/ RFO . The Bid manager will make necessary changes as advised by PA team.

The PA Specialist/ PA HOD will follow **Steps 4.5.1 (a) to 4.5.1 (b)** to view the SBD



Reference: MAUL-HSIP/MED/18/0201/04

Created	5/10/18, 2:27 PM	Procurement Method	Limited International Bidding
Request Type	Request for Quotation (RFQ)	Procurement Agency Approval	pending <input checked="" type="checkbox"/> Solicitation Document Review
Bid Validity Period	180 days	PAC Approval	pending
Bidding Period	14 days		
Issue Date	System generated date		
Quotation Submission Date			
Bid Opening Date			

Step 4.5.1 (k)
Click 'Solicitation Document Review'

Description

MAUL hereby invites you to submit a bid to this invitation for the above referenced object
The attached documents will be divided into various categories: Bidding and contractual information and Returnable forms.

Evaluation Team

Name
Andrew Muhenda
Emma Emma



Solicitation Review, ref: MAUL-HSIP/MED/18/0201/04

Refresh

Back to Solicitation

Solicitation review


Comments
Solicitation Document has been reviewed. The following contents are in order:
1. Evaluation Team
2. Solicitation Attachments
3. Statement of Requirements

Attachment No file chosen

Step 4.5.1 (m)
Click the 'Submit' button to send the SBD to PAC members

Step 4.5.1 (l)

- Solicitation Review - Click the drop down arrow and select 'Submit to PAC'
- Comments – Enter relevant remarks explaining your selection/ choice above
- If you have any relevant attachments that may be helpful to PAC, you can attach them in the field provided

 **IMPORTANT**
Make sure your file to be attached is in PDF format

procurement.spinprocure.com says
The solicitation has been submitted to PAC successfully.



4.5.2 Solicitation Document Approval/ Rejection By Procurement Adjudication Committee (PAC) Members

Once the PA HOD or the PA Specialist has reviewed and submitted the SBD, all PAC members will receive notifications via E-mail and also via system notifications in the E-Procurement.

PAC team members will schedule a meeting to carefully review the following components of the SBD:

- List of Short-listed suppliers
- Evaluation Team
- Procurement Method
- SBD Attachments and
- Any other information that is key concerning the SBD

PAC can either Approve or Reject the SBD.

In case of rejection, E-mail and System notifications are sent to the PA HOD, PA Specialist, and the Bid Manager. The PA HOD/ PA Specialist will submit the rejected document back to the Bid Manager who will incorporate amendments as requested by PAC members, and re-submit the SBD to the PA HOD who will then re-submit the document to the PAC Team.

In case of an approval, E-mail and System notifications are sent to the PA HOD, PA Specialist, Evaluation Team, and the Bid Manager. The PA HOD will then be responsible for sending the SBD to shortlisted bidders. PAC Approval in the system will be effected by the PAC Chairman/ a PAC Member who has been given this mandate by the PAC Team



Rejecting a Solicitation Document By Procurement Adjudication Committee (PAC) Members

Note: System Notifications can also be accessed here.

Step 4.5.2 (a)

After logging in, the PAC member will be required to view his/her system notifications.

The screenshot shows the user interface of an e-Procurement system. On the left is a dark sidebar with the following menu items: 'e-Procurement', 'Notifications' (highlighted with a yellow box), 'Catalogue', 'Requisitions', and 'Solicitations Management'. The main content area is titled 'Dashboard' and contains two panels: 'Assigned Requisitions' and 'Shopping Cart /My Requisitions'. In the top right corner, there is a user profile for 'Rowland Simiyu' with a notification bell icon showing '13' alerts. A yellow box highlights a 'See All Alerts >' button. A yellow callout box points to the notification bell icon, and another yellow callout box points to the 'See All Alerts >' button. A green callout box points to the 'Notifications' menu item in the sidebar.





System Notifications (Unread)

View Read Notifications

Mark all as Read

Step 4.5.2 (b)
Click the 'View' button

#	Title	Time	Time	Actions
1	RFx MAUL-HSIP/MED/18/0201/04 approved	19 minutes ago	5/22/18, 2:18 PM	Mark as Read View
2	Request to approve bids opening.	1 week, 5 days ago	5/10/18, 1:28 PM	Mark as Read View
3	RFx MAUL-HSIP/MED/18/0202/01 approved	on 4/19/18	4/19/18, 7:22 PM	Mark as Read View
4	MAUL-HSIP/MED/17/0401/12 Evaluation Report.	on 4/8/18	4/8/18, 8:55 PM	Mark as Read View
5	MAUL-HSIP/MED/17/0401/12 Evaluation Report.	on 3/28/18	3/28/18, 2:40 PM	Mark as Read View



Notification Details ✕

RFx MAUL-HSIP/MED/18/0201/04 approved

The procurement agency has approved the MAUL-HSIP/MED/18/0201/04 RFx.

[View Procurement](#) [Mark as Read](#)

[Close](#)

Step 4.5.2 (c)
Click 'View Procurement' to view the solicitation document



Reference: MAUL-HSIP/MED/18/0201/04

Created	5/10/18, 2:27 PM
Request Type	Request for Quotation (RFQ)
Bid Validity Period	180 days
Bidding Period	14 days
Issue Date	System generated date
Quotation Submission Date	
Bid Opening Date	

Procurement Method	Limited International Bidding
Procurement Agency Approval	approved on 5/22/18, 2:18 PM
PAC Approval	pending <input checked="" type="checkbox"/> Approve Solicitation Document

Step 4.5.2 (d)
After the scheduled meeting , a PAC member will be given the mandate to post PAC decision in the system
Click 'Approve Solicitation Document' to 'Reject' the SBD if amendments are required

Description

MAUL hereby invites you to submit a bid to this invitation for the above referenced object
The attached documents will be divided into various categories: Bidding and contractual information and Returnable forms.

Evaluation Team

Name
Andrew Muhenda
Emma Emma



Approval: Rejected

PAC decision: This decision was discussed in the PAC Meeting held Tuesday, 1 May 2018. Find recommendations attached


Attach minutes: Choose file PAC Minutes.pdf

Submit

Step 4.5.2 (f)
Click 'Submit' button

Step 4.5.2 (e)

- To reject the Solicitation document, select 'Rejected' under the drop down arrow.
- Enter PAC Decision as discussed in the meeting in the 'PAC Decision' field
- Attach files (Minutes or PAC Decision) that have recommendations for the Bid Manager to incorporate.

 **IMPORTANT**

Make sure your file is in PDF format

Approval set to rejected. Notifications have been sent to bid manager and procurement agency.



1. The PA Specialist or PA HOD will receive notifications (Email & E-Procurement system messages) on the rejection of SBD. PA HOD or PA Specialist will log into the system and follow **Steps 4.5.2 (g) – 4.5.1 (k)** to access, review, and re-submit the SBD back to the Bid Manager.
2. The Bid Manager will receive notifications (Email & E-Procurement system messages) from the PA team on the rejection of SBD by PAC. He/ she will log in to the system and follow **Steps 4.5.2 (l) - 4.5.2 (p)** to access, view, and make adjustments to the solicitation document as advised by the PAC members. Recommendations from PAC Team will be found at the bottom of the Solicitation Document under the '**Solicitation Review and Approval**' Section (**See image below**). Once necessary adjustments are made, the bid manager will re-submit the SBD to the PA Team who will then forward the it to the all PAC members.
3. All PAC members will receive notifications (Email & E-Procurement system messages) from the PA team on the SBD adjustments. They will schedule another meeting to review the SBD with incorporated amendments and then designate a member to post their approval on the E-Procurement system.

Solicitation Review and Approval

Review and Approval details from the PA Team and PAC members are located here



User : Rowland Simiyu

Status: rejected, on Tuesday, May 22, 2018 at 5:5

This decision was discussed in the PAC Meeting held Tuesday, 1 May 2018. Find recommendations attached



User : Procurement Specialist

Status: approved, on Tuesday, May 22, 2018 at 12:30:42 PM East Africa Time

Solicitation Document has been reviewed. The following contents are in order:

1. Evaluation Team
2. Solicitation Attachments
3. Statement of Requirements
4. Price Schedule Template
5. Short-listed Suppliers

Review Attachments :

SOLICITATION DOCUMENTS.pdf [View](#) [Download](#)

Attached Minutes: PAC Minutes.pdf [Download](#)



System notifications can also be accessed here.

Notifications

System Notifications

Configure Procurement

Catalogue

Suppliers Management

Requisitions

Step 4.5.2 (g)

The Procurement Specialist/ PA HOD will access system notifications.

Help

All times in East African Time (EAT)

74

Procurement Specialist

System Notifications (Unread)

View Read Notifications

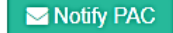
Mark all as Read

#	Title	Time		Actions
1	RFx MAUL-HSIP/MED/18/0201/04 rejected by PAC	41 minutes ago	5/22/18, 5:50 PM	Mark as Read View
2	RFx MAUL-HSIP/MED/18/0201/04 prepared	7 hours, 26 minutes ago	5/22/18, 11:05 AM	Mark as Read View
3	RFx MAUL-HSIP/MED/18/0201/04 prepared	1 day, 1 hour ago	5/21/18, 4:43 PM	Mark as Read View
4	Requisition 37 approved	2 weeks, 1 day ago	5/7/18, 12:27 PM	Mark as Read View

Step 4.5.2 (h)

Click the 'View' button.

Reference: MAUL-HSIP/MED/18/0201/04

 Notify PAC

Created	5/10/18, 2:27 PM
Request Type	Request for Quotation (RFQ)
Bid Validity Period	180 days
Bidding Period	14 days
Issue Date	System generated date
Quotation Submission Date	
Bid Opening Date	

Procurement Method	Limited International Bidding
Procurement Agency Approval	approved on 5/22/18, 2:18 PM <input checked="" type="checkbox"/> Solicitation Document Review
PAC Approval	rejected on Date: 5/22/18, 5:50 PM

Step 4.5.2 (i)
Click the 'Solicitation Document Review' button.

Description

MAUL hereby invites you to submit a bid to this invitation for the above referenced object
The attached documents will be divided into various categories: Bidding and contractual information and Returnable forms.

Evaluation Team



Solicitation Review, ref: MAUL-HSIP/MED/18/0201/04

Refresh

Back to Solicitation

Solicitation review: Send to Bid Manager

Comments: Kindly look into recommendations from PAC. Find PAC Decision under Solicitation Review and Approval section of the SBD

Attachment: Choose file No file chosen

Submit

Step 4.5.2 (k)
Click 'Submit' button

Step 4.5.2 (j)

- Solicitation Review - Select 'Send to Bid Manager' under the drop down arrow.
- Enter any relevant comments to inform the Bid Manager of the required adjustments.
- Attach files that are relevant (Attachments are optional).



IMPORTANT

Make sure your file attachment is in PDF format



Dashboard

Assigned Requisitions 5

Shopping Cart /My Requisitions Requisitions

See All Alerts >

Help All times in East African Time (EAT) 19 Ken

Step 4.5.2 (l)
 The Bid Manager will be required to log in to the system and access system notifications

System

View Read Notifications Mark all as Read

#	Title	Time	Created	Actions
1	RFx MAUL-HSIP/MED/18/0201/04 rejected	21 hours, 44 minutes ago	5/22/18, 6:39 PM	Mark as Read View
2	RFx MAUL-HSIP/MED/18/0201/04 rejected by PAC	22 hours, 33 minutes ago	5/22/18, 5:50 PM	Mark as Read View
3	RFx MAUL-HSIP/MED/18/0201/04 approved	1 day, 2 hours ago	5/22/18, 2:18 PM	Mark as Read View

Most recent system notifications appear at the top of the notifications list

Step 4.5.2 (m)
 Click 'View' button



Notification Details



RFx MAUL-HSIP/MED/18/0201/04 rejected

The procurement agency has rejected the MAUL-HSIP/MED/18/0201/04 RFx.

[View Procurement](#)

[Mark as Read](#)

Step 4.5.2 (n)

Click 'View Procurement' button

[Close](#)





After executing **Step 4.5.2 (n)**, the BM will scroll down the solicitation document and view the Review and Approval details from PA Team and PAC members. Relevant attachments can be found at the bottom of the page

Solicitation Review and Approval



User : Procurement Specialist

Status: rejected, on Tuesday, May 22, 2018 at 6:39:21 PM East Africa Time

Kindly look into recommendations from PAC. Find PAC Decision under Solicitation Review and Approval section of the SBD

Procurement Specialist remarks to the Bid Manager after PAC has rejected a Solicitation Document.



User : Rowland Simiyu

Status: rejected, on Tuesday, May 22, 2018 at 5:50:03 PM East Africa Time

This decision was discussed in the PAC Meeting held Tuesday, 1 May 2018. Find recommendations attached

PAC Decision sent to Procurement Specialist after rejecting a Solicitation Document.



User : Procurement Specialist

Status: approved, on Tuesday, May 22, 2018 at 12:30:42 PM East Africa Time

Solicitation Document has been reviewed. The following contents are in order:

1. Evaluation Team
2. Solicitation Attachments
3. Statement of Requirements
4. Price Schedule Template
5. Short-listed Suppliers

Procurement Specialist remarks to the Bid Manager after approving a Solicitation Document.

Review Attachments :

SOLICITATION DOCUMENTS.pdf

[View](#)

[Download](#)

Attached Minutes: PAC Minutes.pdf

[Download](#)

Attachments as provided by PA Specialist and PAC Team.





The BM will then scroll up and select **Document Menu** → **Edit Solicitation**. After clicking 'Edit Solicitation', the bid manager can edit solicitation attachments and solicitation settings.

Solicitation Document

Reference: MAUL-HSIP/MED/18/0201/04

Created	5/10/18, 2:27 PM
Request Type	Request for Quotation (RFQ)
Bid Validity Period	180 days
Bidding Period	14 days
Issue Date	System generated date
Quotation Submission Date	
Bid Opening Date	

Description

MAUL hereby invites you to submit a bid to this invitation for the above referenced object
The attached documents will be divided into various categories: Bidding and contractual information and Returnable forms.

Evaluation Team

Name
Andrew Muhenda
Emma Emma

Document Menu ▾

View Requisition

Edit Solicitation

Submit to

Procurement Method	Limited International Bidding
Procurement Agency Approval	Changes requested on Date: 5/22/18, 6:39 PM
PAC Approval	rejected on Date: 5/22/18, 5:50 PM

Step 4.5.2 (o)
Click 'Edit Solicitation' button to make adjustments in the SBD

PA Approval status changes from 'Approved' to 'Changes Requested'





After making recommended adjustments, the bid manager can then submit the solicitation document back to the PA HOD and PA Specialist for review and submission to the PAC members.

Solicitation Document

Document Menu ▾

Reference: MAUL-HSIP/MED/18/0201/04



Created	5/10/18, 2:27 PM
Request Type	Request for Quotation (RFQ)
Bid Validity Period	180 days
Bidding Period	14 days
Issue Date	System generated date
Quotation Submission Date	
Bid Opening Date	

Procurement Method	Limited International Bidding
Procurement Agency Approval	Changes requested on 5/22/18, 6:39 PM
PAC Approval	rejected on Date: 5/22/18, 5:50 PM

Step 4.5.2 (p)
Click 'Submit to Procurement Agency'

Description

MAUL hereby invites you to submit a bid to this invitation for the above referenced object
The attached documents will be divided into various categories: Bidding and contractual information and Returnable forms.

Evaluation Team

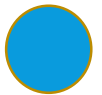


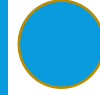
Re-submitting an Amended Solicitation Document to (PAC) Members

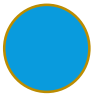
- The PA HOD and PA Specialist will be notified via E-mail and system notifications
- The PA HOD or PA Specialist will log into the system and review the amended solicitation document as described earlier. After PA HOD/ PA Specialist approval, the amended SBD will be re-submitted to PAC members. **(Steps 4.5.1 (a) – (b)) and (Steps 4.5.1 (k) – (m))**
- BM and PAC members will be notified via E-mail and system notifications on the PA HOD/ Specialist decision
- PAC members will follow the approval process as described in the next section.



Approving an amended Solicitation Document By Procurement Adjudication Committee (PAC) Members

 PAC members will be notified via E-mail and also through the e-Procurement system notifications functionality to take action on the amended SBD/ RFQ.

 PAC team will schedule a meeting to review the amended SBD before assigning a member to post the decision in the e-Procurement System

 The PAC members will be required to do the following:

1. Log into the system
2. Access system notifications from the dashboard (**See 4.5.2 (a)**)
3. View the amended solicitation document (**See Step 4.5.2 (b) – 4.5.2 (c)**)
4. If satisfied with adjustments, a PAC member will approve the SBD, give remarks based on what was discussed at the meeting, and submit the approved SBD (**See next page**).

The Bid Manager, Evaluation Team, PA HOD and PA specialist will receive email and system notifications. This will give the PA HOD the go-ahead to send the RFQ to pre-qualified bidders.



Approval


PAC decision

Attach minutes No file chosen

Step 4.5.2 (r)
Click 'Submit' button

Step 4.5.2 (q)

- Select 'Approved' under the drop down arrow.
- Enter any relevant comments to inform the PA HOD/ PA Specialist of PAC's decision
- Attach PAC minutes. (Attachments are optional).

 **IMPORTANT**
Make sure your file attachment is in PDF format

Approval set to approved. Notifications have been sent to bid manager and procurement agency.



Reference: MAUL-HSIP/MED/18/0201/04

Created	5/10/18, 2:27 PM	Procurement Method	Limited International Bidding
Request Type	Request for Quotation (RFQ)	Procurement Agency Approval	approved on 5/23/18, 6:12 PM
Bid Validity Period	180 days	PAC Approval	approved on 5/23/18, 6:44 PM
Bidding Period	14 days		
Issue Date	System generated date		
Quotation Submission Date			
Bid Opening Date			

Description

MAUL hereby invites you to submit a bid to this invitation for the above referenced object
The attached documents will be divided into various categories: Bidding and contractual information and Returnable forms.

Evaluation Team

Name
Andrew Muhenda
Emma Emma

After PA Team and PAC Members' Approval, the status of the SBD reads 'Approved'



4.6 Invite Bidders.

After PAC members have approved a solicitation document, they will submit it to the Procurement Agency HOD and PA Specialist. The PA HOD or the Specialist will then invite bidders by submitting the SBD.

PAC Approved SBD Document.

Step 4.6 (a)

After the PA HOD has logged in to the system, accessed system notifications, and located the PAC approved SBD, he/ she will Click on the 'View' button.

3	RFx MAUL-HSIP/MED/18/0201/06 approved by PAC	4 hours, 10 minutes ago	7/3/18, 11:25 AM	Mark as Read	View
4	RFx MAUL-HSIP/MED/18/0201/06 prepared	4 hours, 33 minutes ago	7/3/18, 11:02 AM	Mark as Read	View
5	Bid manager has added a clarification	5 hours, 28 minutes ago	7/3/18, 10:07 AM	Mark as Read	View
6	Supplier requests clarification for MAUL-HSIP/MED/18/0201/07.	3 days, 23 hours ago	6/29/18, 4:14 PM	Mark as Read	View
7	RFx MAUL-HSIP/MED/18/0201/07 approved by PAC	4 days ago	6/29/18, 2:45 PM	Mark as Read	View

Notification Details



RFx MAUL-HSIP/MED/18/0201/06 approved by PAC

The PAC has approved the MAUL-HSIP/MED/18/0201/06 RFx.

[View Procurement](#)

[Mark as Read](#)

[Close](#)

Step 4.6 (b)

Click on the 'View Procurement' button to direct you to the SBD.



Solicitation Document

Step 4.6 (c)

Click on the 'Invite Suppliers' button to send the SBD to pre-qualified bidders and start bidding timer.

Document Menu ▾

Reference: MAUL-HSIP/MED/18/0201/04

Invite Suppliers

Title:	Supply of ARVs
Created	5/10/18, 2:27 PM
Request Type	Request for Quotation (RFQ)
Bid Validity Period	180 days
Bidding Period	14 days
Issue Date	System generated date
Quotation Submission Date	
Bid Opening Date	

Procurement Method	Limited International Bidding
Procurement Agency Approval	approved on 5/23/18, 6:12 PM
PAC Approval	approved on 5/23/18, 6:44 PM



Reference: MAUL-HSIP/MED/18/0201/06

Title:	Supply of ARVs
Created	6/28/18, 10:54 AM
Request Type	Request for Quotation (RFQ)
Bid Validity Period	31 days
Bidding Period	14 days
Issue Date	7/3/18, 11:44 AM
Quotation Submission Date	7/17/18, 11:44 AM
Bid Opening Date	7/17/18, 11:44 AM

Procurement Method	Limited Internat
Procurement Agency Approval	approved on 7
PAC Approval	appro

13 Days	23 Hours	40 Minutes	07 Seconds
------------	-------------	---------------	---------------

After the PA HOD has executed **Step 4.6 (c)** the timer will begin counting down as stipulated in the bidding period of the SBD.



Once the PA HOD has sent bid invitations to bidders, a confirmation will be sent to the HOD's email and system notification in the e-Procurement portal.

Step 4.6 (d)
Click on the 'System Notifications' icon to retrieve the confirmation

The screenshot shows the e-Procurement portal interface. On the left is a dark sidebar with 'e-Procurement' at the top, followed by 'Notifications', 'System Notifications', and 'Catalogue'. The main header area includes a hamburger menu, 'Help', 'All times in East African Time (EAT)', a notification icon with '93' unread items, and the user name 'Emma Emma'. Below the header, the 'System Notifications (Unread)' section contains two buttons: 'View Read Notifications' and 'Mark all as Read'. A table below lists one notification:

#	Title	Time	Created	Actions
1	RFx MAUL-HSIP/MED/18/0301/08 sent to suppliers.	2 days ago	7/25/18, 9:56 AM	Mark as Read View



5.0 BIDDING

 This section will deal with the following areas:

1. Receiving procurement confirmations from bidders
2. Responding to bidders' clarification requests by the Bid Manager
3. Review and approvals of clarification response by the PA HOD/ Specialist and the PAC Team respectively
4. Sending fully approved clarification responses to suppliers by PA HOD/ Specialist



5.1 Confirmation of Bid Invitation Receipt From Bidders

After bidders have received their bid invitations via E-mail and e-Procurement system notifications, they will be required to confirm receipt of invitation, and state whether they will participate in bidding or not. The MAUL Procurement Team (Bid manager, PA HOD, PA Specialist, and Evaluation Team) will receive notifications of the receipt via E-mail and e-Procurement portal

Step 5.1 (a)
Click on the 'System Notifications' icon to retrieve the confirmation of receipt

The screenshot shows the e-Procurement system interface. On the left is a dark sidebar with 'e-Procurement' at the top, followed by 'Notifications', 'System Notifications', and 'Catalogue'. The main content area is titled 'System Notifications (Unread)'. At the top right of this area are two buttons: 'View Read Notifications' and 'Mark all as Read'. Below this is a table with the following data:

#	Title	Time	Created	Actions
1	EIM Solutions confirms receipt of procurement	18 seconds ago	7/27/18, 10:23 AM	Mark as Read View

In the top right corner of the interface, there is a notification icon with a '45' badge, which is highlighted by a yellow box. A red callout box points to this icon with the text 'Step 5.1 (a) Click on the 'System Notifications' icon to retrieve the confirmation of receipt'.



After confirmation of receipt by bidders, the MAUL Procurement Team (PA HOD, Bid Manager, PA Specialist, and evaluation team) will be able to view the status of confirmation in the '**Shortlisted Suppliers**' section of the SBD.

The screenshot displays the 'All Procurements' section of the MAUL Procurement System. On the left is a dark navigation menu with the following items: Notifications, Catalogue, Requisitions, Solicitations Management, All Bid Solicitations (highlighted with a yellow box), Assigned Solicitations, and Evaluation. The main content area shows a table with the following data:

#	Procurement Reference	Requisition	Title	Procurement Status	Submission Deadline	Actions
1	MAUL-HSIP/MED/18/0301/08	43	Supply of ARVs for 2018 Q3	current		View
2	MAUL-HSIP/MED/18/0201/07	42	A cool procurement title	closed		View
3	MAUL-HSIP/MED/18/0201/06	41	Supply of ARVs	closed	7/17/18, 11:44 AM	View
4	MAUL-HSIP/MED/18/0201/05	40	Procurement of the ARV Drugs	draft		View
5	MAUL-HSIP/MED/18/0201/03	35	Supply of Medical Supplies - ARVs	draft		View

Step 5.1 (c)
Click on the '**View**' button to access the SBD and navigate to the shortlisted suppliers section.

Note
Keep the bid Reference number in mind so that you view the correct SBD.

Step 5.1 (b)
Click on the '**Solicitations Management**' feature and select the '**All Bid Solicitations**' option.



Shortlisted Suppliers

In the Shortlisted Suppliers section of the SBD, the MAUL PA Team will be able to view which suppliers have confirmed receipt and participation.

Provider Name	Reason for Selection	Confirmed Receipt	Confirmed Participation	Date & time Confirmed
[REDACTED]	[REDACTED]	Yes	YES	7/25/18, 10:37 AM
EIM Solutions	prequalified supplier	Yes	YES	7/27/18, 10:23 AM

Solicitation Attachments

Bidding & Contractual Information


Shortlisted Suppliers

Before bidders confirm receipt of bid invitation and confirm participation, the SBD will read 'No' and 'Pending' respectively.


Provider Name	Reason for Selection	Confirmed Receipt	Confirmed Participation	Date & time Confirmed
EIM Solutions	EIM Solutions is a qualified bidder.	No	Pending	
Dummy Supplier	Qualified as test supplier.	No	Pending	



5.2 Replying To Bidders' Clarification Requests

 Bidders may require to seek clarifications on specific bid as they attempt to meet requirements set out by MAUL. Bidder/ supplier clarification notifications will be received via E-mail and e-Procurement portal by the

- Bid Manager
- PA HOD
- PA Specialist

 The **Bid Manager** will be responsible for responding to the bidder clarification requests. The **PA HOD/ Specialist** will review the bid manager's response and then forward the same to **PAC members** for final approval. The **PA HOD/ Specialist** will send the approved response to bidders.



5.2.1 Response to Bidders' Clarifications by Bid Manager

The Bid manager will be required to log in to the e-Procurement portal to view bidders' clarification request notifications.

The supplier clarification notification will appear in the list of notifications.

Note

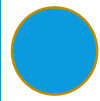
Keep the bid Reference number in mind so that you view the correct SBD notification.

Step 5.2.1 (a)

Click on the 'Notifications' icon and the 'See Alerts' option to view system notifications.

The screenshot shows the e-Procurement portal interface. The top navigation bar includes 'e-Procurement', 'Notifications', 'System Notifications', 'Catalogue', 'Requisitions', 'Solicitations Management', and 'Evaluations'. The user is logged in as Ken Shabola. The notification list is as follows:

#	Title	Time	Created	Actions
1	Supplier requests clarification for MAUL-HSIP/MED/18/0301/08.	1 hour, 35 minutes ago	7/30/18, 11:30 AM	Mark as Read View
2	EIM Solutions confirms receipt of procurement	3 days, 2 hours ago	7/27/18, 10:23 AM	Mark as Read View
3	Pascale Khayeri Mwavaga confirms receipt of procurement	5 days, 2 hours ago	7/25/18, 10:37 AM	Mark as Read View
4	RFx MAUL-HSIP/MED/18/0301/08 approved by PAC	5 days, 3 hours ago	7/25/18, 9:53 AM	Mark as Read View



The Bid Manager will be required to access the solicitation document from the main navigation menu. See image below

The screenshot shows the Bid Manager interface. On the left is a dark navigation menu with the following items: Notifications, Catalogue, Requisitions, Solicitations Management, All Bid Solicitations (highlighted with a yellow box), Assigned Solicitations, and Evaluate. The main content area is titled 'All Procurements' and contains a table with the following data:

#	Procurement Reference	Requisition	Title	Procurement Status	Created	Actions
1	MAUL-HSIP/MED/18/0301/08	43	Supply of ARVs for 2018 Q3	current	8/8/18, 9:56 AM	View
2	MAUL-HSIP/MED/18/0201/07	42	A cool procurement title	closed	7/13/18, 2:47 PM	View
3	MAUL-HSIP/MED/18/0201/06	41	Supply of ARVs	closed	7/17/18, 11:44 AM	View
4	MAUL-HSIP/MED/18/0201/05	40	Procurement of the ARV Drugs	draft		View
5	MAUL-HSIP/MED/18/0201/03	35	Supply of Medical Supplies - ARVs	draft		View

Step 5.2.1 (c)
Click on the 'View' button to access the SBD and edit the clarification

Step 5.2.1 (b)
Click on the 'Solicitations Management' feature and select the 'All Bid Solicitations' option.





Once the SBD has been accessed, the Bid Manager will be required to scroll down to the bottom section of the document where the clarifications feature is located.

The 'Clarifications From Suppliers' section will show clarifications sent by bidders.

Clarifications

Clarification From Suppliers

Clarifications To Suppliers

Clarifications Requests

Efavirenz 50mg, Capsules, 30 Caps

by Pascale Khayeri Mwavaga

Dear MAUL Procurement Agency, We are only able to provide the mentioned drug in pack size of 20 Caps. Kindly confirm if this is in order. Kind Regards, Pascale

30

Jul



Step 5.2.1 (d)

Click on the 'Clarifications To Suppliers' tab to commence the Bid Manager's response to bidders.

Clarifications

Clarification From Suppliers

Clarifications To Suppliers

New Clarification

Step 5.2.1 (e)

Click on the 'New Clarifications' button to begin the response process.



Add Clarification for RFX Reference: MAUL-HSIP/MED/18/0301/08

Subject

Description

Dear Pascale,

Pack size of 20 Caps is in order.

Kind Regards,

Clarification File

No file chosen

Related Clarifications

Step 5.2.1 (g)

Click on the 'Add Clarification' button to send the clarification to the PA HOD for Review.

Step 5.2.1 (f)

- Enter a relevant subject for your response.
- Enter your response in the 'description' field provided. This field can take as many characters as possible.
- Attach a file relevant to the bid response.



IMPORTANT

Make sure your file attachment is in PDF format

The clarification has been added. On Procurement team approval it will be attached to the standard bidding document.



5.2.2 PA HOD/ Specialist Review of Bid Manager's Response to Bidders

Request Change

The PA HOD/ Specialist will receive an E-mail notification and system notification when the bid manager responds to bidders. The PA HOD/ Specialist will be required to log in to the system and access system notifications.

The screenshot displays the 'e-Procurement' interface. On the left is a dark sidebar with navigation options: 'Notifications', 'System Notifications', 'Catalogue', and 'Requisitions'. The main content area is titled 'System Notifications (Unread)'. At the top right of this area is a 'See All Alerts >' link, highlighted with a yellow box. Below this is a table of notifications. The first row is highlighted with a yellow box and contains the following data:

#	Title	Time	Created	Actions
1	Bid manager has added a clarification	19 hours, 12 minutes ago	7/30/18, 4:12 PM	Mark as Read View
2	Supplier requests clarification for MAUL-HSIP/MED/18/0301/08.	23 hours, 54 minutes ago	7/30/18, 11:30 AM	Mark as Read View

Other elements in the screenshot include a 'Help' icon, a user profile 'Emma Emma' with a notification badge '95', and a 'Mark all as Read' button.

Step 5.2.2 (a)

Click on the 'Notifications' icon and the 'See Alerts' option to view system notifications.

The PA HOD/ Specialist will receive a notification on the bid manager's response.



To view the clarification response from the Bid Manager and act accordingly, the PA HOD/ Specialist will access the 'Other Approvals' functionality in the portal's main navigation menu and select 'Clarifications To Suppliers'.

Step 5.2.2 (b)

Click on the 'Other Approvals' feature in the navigation menu. Select the 'Clarifications to Suppliers' option to view the clarifications that require reviews.

The screenshot displays a web portal interface. On the left, a dark navigation menu is visible with the following items: 'Requisitions', 'Solicitations Management', 'Other Approvals' (highlighted in yellow), 'Clarifications to Suppliers' (highlighted in green), 'Preliminary Evaluations', 'Technical Evaluations', 'Commercial Evaluations', 'Evaluations Clarifications', 'Price Negotiations Approvals', and 'Evaluations'. The main content area on the right shows a list of items, including 'Assigned Requisitions' and 'Shopping Cart / My Requisitions'. A red callout box points to the 'Other Approvals' menu item with the text 'Step 5.2.2 (b) Click on the 'Other Approvals' feature in the navigation menu. Select the 'Clarifications to Suppliers' option to view the clarifications that require reviews.'



Step 5.2.2 (c)

Click on the 'View' button to access the response in question.

Note

Keep the bid Reference number in mind so that you view the correct clarification response.

Clarifications to Suppliers

#	Bid Solicitation	Bid Manager	Reference_number	Status	Subject	Created	Modified	Actions
1	Supply of ARVs for 2018 Q3	Ken Shabola	MAUL-HSIP/MED/18/0301/08	Pending	Efavirenz 50mg, Capsules, 30 Caps	7/30/18, 4:12 PM	7/30/18, 4:12 PM	View
2	A cool procurement title	Dennis Kibunja	MAUL-HSIP/MED/18/0201/07	Approved	Test Clarification	7/3/18, 10:07 AM	7/3/18, 3:20 PM	View
3	Supply of Ols	Ken Shabola	MAUL-HSIP/MED/18/0202/01	Approved	Clarification to suppliers	4/19/18, 9:06 PM	4/19/18, 9:10 PM	View
4	Purchase of ARVs	Ken Shabola	MAUL-HSIP/MED/17/0401/12	Approved	MAUL-HSIP/MED/17/0401/12 Clarification 1	2/7/18, 11:49 AM	2/7/18, 11:50 AM	View
5	ARVs RFQ	Andrew Muhenda	MAUL-PSSP/MED/17/0301/03	Approved	Clarification To Supplier	8/31/17, 12:24 PM	8/31/17, 12:25 PM	View



Subject: Efavirenz 50mg, Capsules, 30 Caps

◀ Clarifications

Dear Pascale,

Pack size of 20 Caps is in order.

Kind Regards,
MAUL Procurement Team

If the PA HOD/ Specialist is comfortable with the Bid Manager's response, they have an option of sending the clarification response directly to bidders without having to go through PAC Team members. The **'Approve and Send to Suppliers'** button can be used in this case.

Created: ⌚ Monday, July 30, 2018 at 4:12 PM , Bid manager: ● , Bid Solicitation: 📁 Supply of ARVs for 2018 Q3 , Reference number: ● MAUL-HSIP/MED/18/0301/08

✓ Approval

✓ Approve and Send to Suppliers

Step 5.2.2 (d)

Click on the **'Approval'** button to access the approval window.



The e-Procurement portal provides a drop down with various selection options where the PA HOD/ Specialist can select the **'Request Change'** option.

Clarification PA Team Approval

Approval: Request Change

Remarks: Dear Ken (Bid Manager)
Kindly add that although 20 Caps is in order, pack size 30 Caps is more preferred for distribution purposes
Kind Regards,
PA HOD

Submit Close

Step 5.2.2 (e)

- Select **'Request Change'** option on the drop down arrow.
- Enter your response in the **'Remarks'** field provided. This field can take as many characters as possible.

Step 5.2.2 (f)

Click on the **'Submit'** button to re-send the clarification back to the Bid Manager for editing.



The clarification has been review. Notifications has been sent.



Subject: Efavirenz 50mg, Capsules, 30 Caps

Status: **Under Review**

← Clarifications

Dear Pascale,

Pack size of 20 Caps is in order.

Kind Regards,

MAUL Procurement Team

Created: ⌚ Monday, July 30, 2018 at 4:12 PM , Bid manager: 👤 Ken , Bid Solicitation: 📁 Supply of ARVs for 2018 Q3 , Reference number: ● MAUL-HSIP/MED/18/0301/08



Emma Emma

Review - Dear Ken (Bid Manager) Kindly add that although 20 Caps is in order, pack size 30 Caps is more preferred for distribution purposes Kind Regards, PA HOD

Created: ⌚ Tuesday, July 31, 2018 at 2:55 PM



The Bid Manager will receive E-mail and system notifications on the PA HOD/ Specialist review. The Bid Manager be required to log in to the portal and access the solicitation document to make adjustments as requested by the PA HOD/ Specialist with regards to the clarification response.

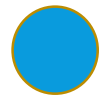
System Notifications (Unread)

View Read Notifications Mark all as Read

#	Title	Time	Created	Actions
1	PA Team has requested change to clarification.	12 minutes ago	7/31/18, 2:55 PM	Mark as Read View
2	Supplier requests clarification for MAUL-HSIP/MED/18/0301/08.	1 day, 3 hours ago	7/30/18, 11:30 AM	Mark as Read View
3	Supplier confirms receipt of procurement	4 days, 4 hours ago	7/27/18, 10:23 AM	Mark as Read View

System notification on the Bid Manager's dashboard. This notification will also be received via E-mail.





The Bid Manager will be required to access the solicitation document from the main navigation menu. See image below

- Notifications
- Catalogue
- Requisitions
- Solicitations Management
 - All Bid Solicitations
 - Assigned Solicitations
 - Evaluations

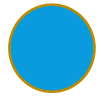
All Procurements

#	Procurement Reference	Requisition	Title	Procurement Status	Lead Time	Created At	Actions
1	MAUL-HSIP/MED/18/0301/08	43	Supply of ARVs for 2018 Q3	current		8/8/18, 9:56 AM	View
2	MAUL-HSIP/MED/18/0201/07	42	A cool procurement title	closed		7/13/18, 2:47 PM	View
3	MAUL-HSIP/MED/18/0201/06	41	Supply of ARVs	closed		7/17/18, 11:44 AM	View
4	MAUL-HSIP/MED/18/0201/05	40	Procurement of the ARV Drugs	draft			View
5	MAUL-HSIP/MED/18/0201/03	35	Supply of Medical Supplies - ARVs	draft			View

Step 5.2.2 (h)
Click on the 'View' button to access the SBD and edit the clarification

Step 5.2.2 (g)
Click on the 'Solicitations Management' feature and select the 'All Bid Solicitations' option.





Once the SBD has been accessed, the Bid Manager will be required to scroll down to the bottom section of the document where the clarifications feature is located.

The screenshot displays the 'Clarifications' section of a software interface. At the top, there are two tabs: 'Clarification From Suppliers' and 'Clarifications To Suppliers'. The 'Clarifications To Suppliers' tab is highlighted with a yellow border. Below the tabs is a blue button labeled 'New Clarification'. The main content area shows a clarification for 'Efavirenz 50mg, Capsules, 30 Caps'. To the left of this entry is a green 'Edit' button, also highlighted with a yellow border. To the right is a grey button showing '30 Jul'. Below the clarification text, there is a profile card for 'Emma En' with the title 'Review - De' and 'PA HOD'. The card includes a profile picture icon and a timestamp: 'Created: Tuesday, July 31, 2018 at 2:55 PM'. The clarification text itself reads: 'Dear Pasca... Pa... Kind Regards, MAUL Procurement Team' and 'at although 20 Caps is in order, pack size 30 Caps is more preferred for distribution purposes Kind Regards,'.

Step 5.2.2 (i)
Click on the 'Clarifications To Suppliers' Tab

Edit

Step 5.2.2 (j)
Click on the 'Edit' button to begin the editing process.



Edit Clarification for MAUL-HSIP/MED/18/0301/08

Subject Efavirenz 50mg, Capsules, 30 Caps

Description Dear Pascale,

Pack size of 20 Caps is in order. Kindly note that for distribution purposes, we prefer 30 Caps.

Clarification File (Overwrites existing file) No file chosen

Final Review? Check Box to Notify Procurement Team.

Related Clarifications

[← Back](#)

Efavirenz 50mg, Capsules, 30 Caps

Dear Pascale, Pack size of 20 Caps is in order. Kind Regards, MAUL Procurement Team

30
Jul

Step 5.2.2 (l)

Click on the 'Save' button to re-send the amended response back to the PA HOD/ Specialist.

Step 5.2.2 (k)

Edit the section as recommended by PA HOD/ Specialist. Check the box provided to notify Procurement HOD/ Specialist on the amendment.



IMPORTANT

Make sure your file attachment is in PDF format

The clarification has been updated.



5.2.2 PA HOD/ Specialist Review of Bid Manager's Response to Bidders

Approvals

Once the Bid Manager has re-submitted the clarification response to the PA HOD/ Specialist, the latter will be required to log in to the portal approve the adjusted response.

System Notifications (Unread) View Read Notifications Mark all as Read

#	Title	Time	Created	Actions
1	Bid manager has made changes to the clarification	1 hour, 8 minutes ago	8/1/18, 2:47 PM	Mark as Read View
2	manager has added a clarification	1 day, 23 hours ago	7/30/18, 4:12 PM	Mark as Read View
3	requests clarification for MAUL-HSIP/MED/18/0301/08.	2 days, 4 hours ago	7/30/18, 11:30 AM	Mark as Read View

System notification on the PA HOD/ Specialist's dashboard. This notification will also be received via E-mail.



The PA HOD/ Specialist will follow **Steps 5.2.2 (b) – 5.2.2 (d)**, and perform the following actions:

1. Click the **'Other Approvals'** feature in the main navigation menu.
2. Select **'Clarification to Suppliers'** option
3. Click the **'View'** button to access the amended response.
4. Click the **'Approval'** button to access the approval window shown in the image below.

Clarification PA Team Approval

Approval: Approved

Remarks: The response is in order and can be sent to suppliers.

Submit Close

Step 5.2.2 (m)

- Select **'Approved'** option on the drop down arrow.
- Enter your response in the **'Remarks'** field provided. This field can take as many characters as possible.

Step 5.2.2 (n)

Click on the **'Submit'** button to re-send the clarification back to the Bid Manager for editing.

The clarification has been approved. Notifications has been sent.

The clarification has been approved. Notifications has been sent.



Subject: Efavirenz 50mg, Capsules, 30 Caps

Status: **Approved**

← Clarifications

Dear Pascale,

Pack size of 20 Caps is in order. Kindly note that for distribution purposes, we prefer 30 Caps.

Kind Regards,
MAUL Procurement Team

Created: ⌚ Monday, July 30, 2018 at 4:12 PM , Bid manager: 👤 Ken , Bid Solicitation: 📁 Supply of ARVs for 2018 Q3 , Reference number: ● MAUL-HSIP/MED/18/0301/08



Emma Emma

Review - Dear Ken (Bid Manager) Kindly add that although 20 Caps is in order, pack size 30 Caps is more preferred for distribution purposes Kind Regards, PA HOD

Created: ⌚ Tuesday, July 31, 2018 at 2:55 PM



Emma Emma

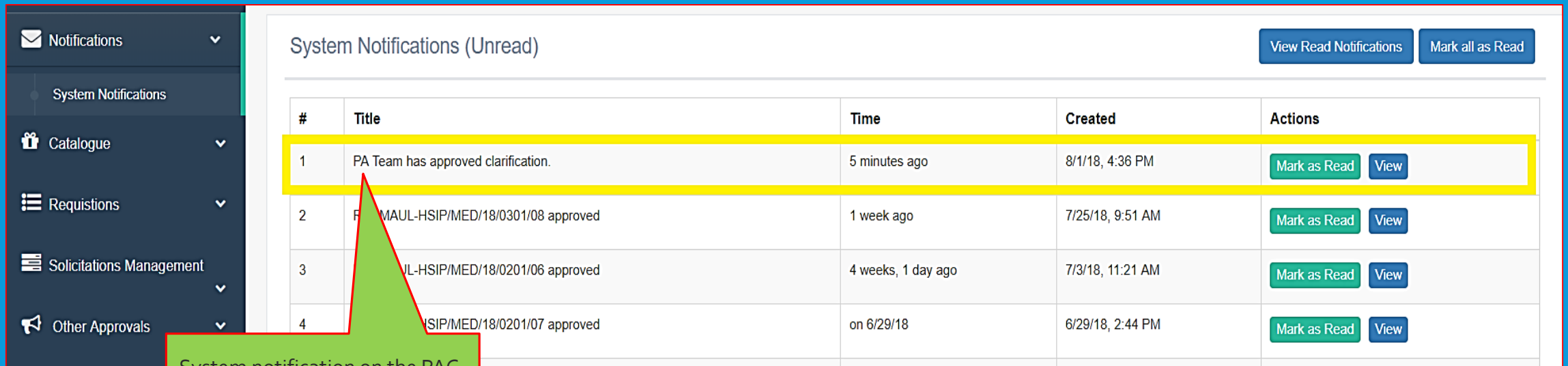
Approved - The response is in order and can be sent to suppliers.

Created: ⌚ Wednesday, August 1, 2018 at 4:36 PM



5.2.3 PAC Team Approval of Bid Manager's Response to Bidders

The PAC Team members will receive an E-mail notification and system notifications after the PA HOD/ Specialist reviews and gives a go ahead for the response to be submitted to bidders. The PAC Team members after a scheduled meeting will assign a member/ PAC Chair to log in to and post their final approval in the e-Procurement system.



System Notifications (Unread)

#	Title	Time	Created	Actions
1	PA Team has approved clarification.	5 minutes ago	8/1/18, 4:36 PM	Mark as Read View
2	F MAUL-HSIP/MED/18/0301/08 approved	1 week ago	7/25/18, 9:51 AM	Mark as Read View
3	L-HSIP/MED/18/0201/06 approved	4 weeks, 1 day ago	7/3/18, 11:21 AM	Mark as Read View
4	HSIP/MED/18/0201/07 approved	on 6/29/18	6/29/18, 2:44 PM	Mark as Read View

System notification on the PAC Team members' dashboard. This notification will also be received via E-mail.



Step 5.2.3 (a)

Click on the 'Other Approvals' feature in the navigation menu. Select the 'Suppliers Clarifications' option to view the clarifications that require approval.

Step 5.2.3 (b)

Click on the 'View' button to access the clarification response

The screenshot displays a navigation menu on the left side of the page. The menu items are: Notifications, Catalogue, Requisitions, Solicitations Management, Other Approvals, Deadline Change Requests, Bids Opening Approval, and Suppliers Clarifications. The 'Other Approvals' item is highlighted with a yellow box, and the 'Suppliers Clarifications' item is highlighted with a green box. The main content area shows a table with the following data:

Bid Solicitation	Bid Manager	Reference_number	Status	Subject	Created	Modified	Actions
1 Supply of ARVs for 2018 Q3	Ken Shabola	MAUL-HSIP/MED/18/0301/08	Pending	Efavirenz 50mg, Capsules, 30 Caps	7/30/18, 4:12 PM	8/1/18, 4:36 PM	View

Below the table, there are navigation buttons: '< previous' and 'next >'. Below the navigation buttons, it says 'Page 1 of 1, showing 1 record(s) out of 1 total'.



- Notifications
- Catalogue
- Requisitions
- Solicitations Management
- Other Approvals
- Evaluations
- Awards
- Contract Management
- Reports

Subject: Efavirenz 50mg, Capsules, 30 Caps

Dear Pascale,
Pack size of 20 Caps is in order, for distribution purposes, we prefer 30 Caps.
Kind Regards,
MAUL Procurement Team

Step 5.2.3 (c)
Click on the 'Approval' button to access the approval window

Approval Minutes not attached

Created: Monday, July 30, 2018 at 4:12 PM , Bid manager: Ken , Bid Solicitation: Supply of ARVs for 2018 Q3 , Reference number: MAUL-HSIP/MED/18/0301/08

Approval



Emma Emma

Review - Dear Ken (Bid Manager) Kindly add that although 20 Caps is in order, pack size 30 Caps is more preferred for distribution purposes Kind Regards, PA HOD

Created: Tuesday, July 31, 2018 at 2:55 PM



Emma Emma

Approved - The response is in order and can be sent to suppliers.

Created: Wednesday, August 1, 2018 at 4:36 PM



Clarification Approval

Approval: Approved

Remarks: Send to bidders

Attach Minutes: Choose file PAC Minutes.pdf

Submit Close

Step 5.2.3 (d)

- Select 'Approved' option in the drop down menu.
- Enter PAC decision as discussed in the meeting in the 'Remarks' field provided
- Attach PAC minutes if available.



IMPORTANT

Make sure your file attachment is in PDF format

Step 5.2.3 (e)

Click on the 'Submit' button to complete the approval process.

The clarification has been approved Notifications has been sent to the Bid manager, Procurement Manager and the Procurement Specialists.



Once the PAC Team members have approved the Bid Manager's response, the MAUL PA team (Bid manager, PA HOD, and PA Specialist) will receive both E-mail and system notifications on the decision. PA HOD/ PA Specialist will be responsible for sending the approved response to bidders.

#	Title	Time	Created	Actions
1	PAC has approved clarification.	50 minutes ago	8/1/18, 4:47 PM	Mark as Read View
2	PA [redacted] has approved clarification.	1 hour, 2 minutes ago	8/1/18, 4:36 PM	Mark as Read View
3	PA [redacted] has requested change to clarification.	1 day, 2 hours ago	7/31/18, 2:55 PM	Mark as Read View

System notification on the PA HOD/ Specialist's dashboard. This notification will also be received via E-mail.



Step 5.2.3 (f)

Click on the 'Other Approvals' feature in the navigation menu. Select the 'Clarifications to Suppliers' option to view the clarifications that require submission to bidders

The screenshot displays a software interface with a dark navigation menu on the left and a light main content area on the right. The navigation menu includes the following items:

- Requisitions
- Solicitations Management
- Other Approvals** (highlighted in yellow)
- Clarifications to Suppliers** (highlighted in green)
- Preliminary Evaluations
- Technical Evaluations
- Commercial Evaluations
- Evaluations Clarifications
- Price Negotiations Approvals
- Evaluations

The main content area shows a list of items with expand/collapse and close icons:

- Assignment 1
- Solicitations Pending Approval 1
- Assigned Requisitions
- Shopping Cart /My Requisitions Requisitions
- Shopping Cart
- Top 5 Requisitions



Step 5.2.3 (g)

Click on the 'View' button to access the response and send to bidders.

Note

Keep the bid Reference number in mind so that you view the correct clarification response.

#	Bid Solicitation	Bid Manager	Reference_number	Status	Subject	Created	Modified	Actions
1	Supply of ARVs for 2018 Q3	Ken Shabola	MAUL-HSIP/MED/18/0301/08	Approved	Efavirenz 50mg, Capsules, 30 Caps	7/30/18, 4:12 PM	8/1/18, 4:47 PM	View
2	A cool procurement title	Dennis Kibunja	MAUL-HSIP/MED/18/0201/07	Approved	Test Clarification	7/3/18, 10:07 AM	7/3/18, 3:20 PM	View
3	Supply of Ols	Ken Shabola	MAUL-HSIP/MED/18/0202/01	Approved	Clarification to suppliers	4/19/18, 9:06 PM	4/19/18, 9:10 PM	View
4	Purchase of ARVs	Ken Shabola	MAUL-HSIP/MED/17/0401/12	Approved	MAUL-HSIP/MED/17/0401/12 Clarification 1	2/7/18, 11:49 AM	2/7/18, 11:50 AM	View
5	ARVs RFQ	Andrew Muhenda	MAUL-PSSP/MED/17/0301/03	Approved	Clarification To Supplier	8/31/17, 12:24 PM	8/31/17, 12:25 PM	View



Subject: Efavirenz 50mg, Capsules, 30 Caps

Status: **Approved** [← Clarifications](#)

Dear Pascale,

Pack size of 20 Caps is in order. Kindly note that for distribution purposes, we prefer 30 Caps.

Kind Regards,
MAUL Procurement Team

Attached Approval Minutes: PAC Minutes.pdf [Download](#)

Created: Monday, July 30, 2018 at 4:12 PM Supply of ARVs for 2018 Q3 , Reference number: MAUL-HSIP/MED/18/0301/08

[✔ Send to Suppliers](#)


Step 5.2.3 (h)
Click on the 'Send to Suppliers' button to complete the clarification response process.


Emma Emma
Review - Dear Ken (Bid Manager) Kindly add that although 20 Caps is in order, pack size 30 Caps is more preferred for distribution purposes Kind Regards, PA HOD
Created: Tuesday, July 31, 2018 at 2:55 PM


The clarification has been sent to the suppliers.



5.3 Changing Bidding Period

 The bidding period is the time given to bidders to submit their bids to MAUL procurement team after which, the bid is closed. The bidding period is automatically displayed during preparation of the solicitation document. During configuration of the various Procurement Methods, the bidding period is defined.

 The Bid Manager can request change of bidding period if an extension or time reduction is needed. The request will go through proper authorization channels. The bidding period can only be changed if the initial time stipulated has not elapsed. The PAC team will be required to approve this request.

 The Bid Manager will be required to log into the system and follow the following path: On the Main Menu click **Solicitations Management** → **All Bid Solicitations**. The system will display ALL solicitation documents that have been prepared and sent out by the Procurement Team. Click the **View** button next to the Solicitation Document you want to amend the bidding period. The specific solicitation document will be displayed (**See Next Page**). The BM can extend the bidding period even after the bidding period has elapsed.



Solicitation Document

Reference: MAUL-HSIP/MED/02/0101/15

Title:	Supply of ARVs for Project YR 02 Q 01
Created	10/1/18, 11:10 AM
Request Type	Request for Quotation (RFQ)
Bid Validity Period	7 days
Bidding Period	1 days
Issue Date	10/1/18, 4:05 PM
Quotation Submission Date	10/2/18, 11:17 AM
Bid Opening Date	10/2/18, 11:17 AM

Procurement Method	Limited Internat
Procurement Agency Approval	approved on 10/1/18, 3:54 PM
PAC Approval	approved on 10/1/18, 3:59 PM

Step 5.3 (a)
Click on the 'Document Menu' drop down arrow and select the **Change Bidding Period** option.

Document Menu ▾

- View Requisition
- Change Bidding Period**
- View Bids

Description

MAUL hereby invites you to submit a bid to this invitation for the above referenced object. Attached documents are divided into categories: Bidding and contractual information, and returnable documents.

Evaluation Team



Request Change of Bidding Period from PAC ×

New Bidding Period(Days)

Reason for request

Request Change **Close**

Step 5.3 (b)

- Enter the new bidding period value in the **New Bidding Period** field.
- Enter a brief explanation on the change being requested.
- Click on the **Request Change** button to complete the process.



6.0 BID/ QUOTATION OPENING

The MAUL PA Team will not be able retrieve suppliers' bids until the countdown timer has elapsed. Once the bidding period is complete, the Bid Manager will submit a request for bid opening to PAC for authorization. A designated **PAC Team member** will authorize bid opening in the system. This is stipulated during preparation of the solicitation document (**See Section 4.4.4**).

The screenshot displays a 'Solicitation Document' page for reference MAUL-HSIP/MED/18/0301/08. The document details include:

Title:	Supply of ARVs for 2018 Q3	Procurement Method:	International Bidding
Created:	7/24/18, 12:04 PM	Procurement Agency Approval:	approved on 7/25/18, 9:51 AM
Request Type:	Request for Information (RFI)	PAC Approval:	approved on 7/25/18, 9:53 AM
Bid Validity Period:	20 days		
Bidding Period:	14 days		
Issue Date:	7/25/18, 9:56 AM		
Quotation Submission Date:	8/8/18, 9:56 AM		
Bid Opening Date:	8/8/18, 9:56 AM		

A countdown timer is visible, showing 0 Days, 00 Hours, 00 Minutes, and 00 Seconds. A green callout box with a red border points to the timer, containing the text: 'Bidding Period timer will read zero to show the submission period has elapsed. Note: This timer functionality will disappear when the bidding period is over.'



ALL solicitation documents whose Bidding period has elapsed, will have procurement status 'Closed'. If the timer is still counting down, the status will read 'Current'.

#	Procurement Reference	Requisition	Title	Procurement Status	Posting Status	Bid Submission Deadline	Actions
1	MAUL-HSIP/MED/18/0301/08	43	Supply of ARVs for 2018 Q3	closed		8/8/18, 9:56 AM	View
2	MAUL-HSIP/MED/18/0201/07	42	A cool procurement title	closed		7/13/18, 2:47 PM	View
3	MAUL-HSIP/MED/18/0201/06	41	Supply of ARVs	closed		7/17/18, 11:44 AM	View
4	MAUL-HSIP/MED/18/0201/05	40	Procurement of the ARV Drugs	draft			View

- Notifications
- Catalogue
- Requisitions
- Solicitations Management
 - All Bid Solicitations
 - Assess Bid Solicitations

The Bid Manager, PA HOD, PA Specialist, Evaluation Team, and PAC Team members will be able to view ALL solicitation documents that have been prepared and sent out by the Procurement Team.



6.1 Bid Opening Approval Request

The screenshot displays a web application interface for procurement management. On the left is a dark navigation sidebar with the following items: Notifications, Catalogue, Requisitions, Solicitations Management, All Bid Solicitations (highlighted with a yellow box), and Assigned Bid Solicitations. The main content area is titled "All Procurements" and contains a table with the following data:

#	Procurement Reference	Requisition	Title	Procurement Status	Posting Status	Bid Submission Deadline	Actions
1	MAUL-HSIP/MED/18/0301/08	43	Supply of ARVs for 2018 Q3	closed		8/8/18, 9:56 AM	View
2	MAUL-HSIP/MED/18/0201/07	42	A cool procurement title	closed		7/13/18, 2:47 PM	View
3			ARVs	closed		7/17/18, 11:44 AM	View
			ment of the ARV Drugs	draft			View

Step 6.1 (a)
The Bid Manager will log into the system and access the main menu. On the Main Menu, click on the 'Solicitations Management' drop down menu and select 'All Bid Solicitations'

Step 6.1 (b)
Click on the 'View' button.

Solicitation Document

Reference: MAUL-HSIP/MED/18/0101/01

Title:	Supply of Medical Supplies - ARVs
Created	4/8/19, 4:31 PM
Request Type	Request for Quotation (RFQ)
Bid Validity Period	120 days
Bidding Period	1 days
Issue Date	4/9/19, 11:00 AM
Quotation Submission Date	4/10/19, 11:00 AM
Bid Opening Date	4/10/19, 11:00 AM

Procurement Method	Open International
Procurement Agency Approval	approved on 4/9/19, 10:50 AM
PAC Approval	approved on 4/9/19, 10:55 AM

Document Menu ▾

View Requisition

Change Bidding Period

View Bids

Step 6.1 (c)

Click on the 'Document Menu' drop down menu and select 'View Bids'.

Description

MAUL hereby invites you to submit a bid to this invitation for the above referenced object.

The attached documents will be divided in to two:

1. Bidding and Contractual information
2. Returnable forms

Evaluation Team



Bids submitted for MAUL-HSIP/MED/18/0101/01

Bids Opening Approval Request

Preliminary Evaluation Settings

#	Provider Name	Primary Contact	Final Submission	Preliminary Evaluation	Com	valuation	Financial Evaluation	Actions
1	EIM Solutions	Cecilia Wambui	Final	not done	Not op	ened	Not done	Pending opening approval
2	Tims Company	Tim Mbogo	Final	not done	Not op	ened	Not done	Pending opening approval
3	Dummy Supplier	John Kamau	Final	not done	Not opened	Not opened	Not done	Pending opening approval

Step 6.1 (d)
Click on the 'Bids Opening Approval Request' button.

Bids opening approval successfully requested. Nominated PAC Member has been notified.

Products to be Supplied


#	Product	Pack Size	Quantity
1	Efavirenz 50mg, Capsules, 30 Caps	30	1,000
2	Abacavir 60mg, Tablets, 30 Tabs	30	1,000
3	Atazanavir 300mg, Capsules, 30 Caps	30	1,000

#	Bid Manager(s)
1	Ken Shabola

#	Evaluators
1	Andrew Muhenda
2	Emma Emma



6.2 Bid Opening Approval

 After the Bid Manager has sent the Bid Approval Opening Request to the designated PAC member, the latter will be required to log into the system to approve the request. The Bid Opening Request can be approved in two ways:

1. By accessing **System Notifications** on the Main Menu
2. By Accessing **Other Approvals** on the Main Menu



IMPORTANT

The designated PAC member is assigned this task during preparation of the Solicitation document. **See section 4.4.4 -**

'Nominate PAC Member to Authorize Bids Opening'

6.2.1 Bid Opening Approval – Other Approvals

Bids Opening Approvals

#	Bid Solicitation	Reference Number	Approval Status	Created	Bid Manager	Actions
1	Supply of ARVs for 2018 Q3	MAUL-HSIP/MED/18/0301/08	Pending	7/24/18, 12:04 PM	ken	Approve
2	A cool procurement title	MAUL-HSIP/MED/18/0201/07	Pending	6/29/18, 12:22 PM		Approve
3	Supply of ARVs	MAUL-HSIP/MED/18/0201/06	Pending			Approve
4	Procurement of the ARV Drugs	MAUL-HSIP/MED/18/0201/05	Pending			Approve
5	Supply of ARVs	MAUL-HSIP/MED/18/0201/04	Pending	5/10/18, 2:27 PM	ken	Approve
6	Supply of Ols	MAUL-HSIP/MED/18/0202/01	Pending	4/19/18, 7:10 PM	ken	Approve

Step 6.2.1 (a)

The designated PAC Team member authorized to approve bid opening, will log in to the portal and access the main navigation menu. Click on the 'Other Approvals' drop down and select 'Bids opening Approval'

Step 6.2.1 (b)

Click on the 'Approve' button to allow the Bid Manager to access supplier bids for evaluation.

6.2.2 Bid Opening Approval – System Notifications

The screenshot shows a web application interface for system notifications. On the left is a dark sidebar with a 'Notifications' dropdown menu. The 'System Notifications' option is highlighted with a yellow box. A yellow callout box points to this option with the text: **Step 6.2.2 (a)** Click on the 'Notifications' drop down and select 'System Notifications'.

The main content area is titled 'System Notifications (Unread)'. It features two buttons at the top right: 'View Read Notifications' and 'Mark all as Read'. Below the title is a table with the following columns: '#', 'Title', 'Time', 'Created', and 'Actions'. The table contains six rows of notification data. The first row is highlighted, and a yellow callout box points to its 'View' button with the text: **Step 6.2.2 (b)** Click on the 'View' button.

#	Title	Time	Created	Actions
1	Request to approve bids opening.	39 minutes ago	4/10/19, 11:41 AM	Mark as Read View
2	REx MAUL HSIP/MED/18/0101/01 approved	1 day, 1 hour ago	4/9/19, 10:50 AM	Mark as Read View
	MED/18/0401/18 Evaluation Report.	1 week ago	4/8/19, 10:45 AM	Mark as Read View
	Opening Approval	3 weeks, 2 days ago	3/29/19, 10:45 AM	Mark as Read View
	Request to approve bids opening.	3 weeks, 5 days ago	3/29/19, 10:45 AM	Mark as Read View
	Request to approve bids opening.	3 weeks, 5 days ago	3/15/19, 9:42 AM	Mark as Read View

Step 6.2.2 (a)
Click on the
'Notifications' drop
down and select
'System Notifications'

Step 6.2.2 (b)
Click on the 'View'
button



Notification Details



Request to approve bids opening.

The bid manager is requesting for the opening of the MAUL-HSIP/MED/18/0101/01 procurement.

Bids Opening Approval

Mark as Read

Close

Step 6.2.2 (c)

Click on the 'Bids Opening Approval' button



Bids Solicitation Openings - Pending Approval

Approved

#	Bid Solicitation	Reference Number	Approval Status	Created	Bid Manager	Actions
1	Supply of Medical Supplies - ARVs	MAUL-HSIP/MED/18/0101/01	Pending	4/8/19, 4:31 PM	ken	Approve
2	A Procurement Here	MAUL-HSIP/MED/02/0101/10	Pending	9/20/18, 1:04 PM	ken	Approve

Note


Once a PAC member approves the Bid Opening Request, the Bid Solicitation document will no longer be visible in the listing.

Step 6.2.2 (d)
Click on the 'Approve' button.


Approved successfully.



7.0 EVALUATION OF BIDS

 Bid evaluation is the process that takes place after the bid submission deadline has elapsed. It involves the opening and examination of the bids to identify if the preferred supplier(s) for the goods and services have complied with the terms stipulated in the procurement.

Once the designated PAC team member has authorized bid opening, the Bid Manager will be able to commence the evaluation process. The Bid Manager will be responsible for completing the evaluation within the system.

 This section will deal with the following areas of the Evaluation stages:

1. Preliminary Evaluation
2. Commercial Evaluation
3. Technical Evaluation
4. Financial Evaluation



7.1 Preliminary Evaluation

● The preliminary evaluation stage ascertains whether the pre-qualified suppliers/ vendors have complied with the requirements as stipulated in the various solicitation documents submitted to them by MAUL Procurement Agency Team.

● The Bid Manager will be responsible for completing the preliminary evaluation within the system. This will be done on screen/projector during evaluation team meeting. The Bid Manager will therefore be required to log into the system and post relevant preliminary evaluation transactions.

● Some of the criteria used during the preliminary evaluation stage may include:

- Completeness of bidding documents
- Eligibility of bidders
- Furnishing of required securities
- Proper signatories in bidding documents



Viewing Pre-qualified Suppliers' Bids

Step 7.1 (a)

The **Bid Manager** will log in to the portal and access the main navigation menu.

Click on the '**Solicitation Management**' drop down and select '**All Bid Solicitations**'

#	Procurement Reference	Requisition	Title	Procurement Status	Posting Status	Bid Submission Deadline	Actions
1	MAUL-HSIP/MED/18/0301/11	46	Supply of ARVs for Q4	closed		9/11/18, 10:05 AM	View
2	MAUL-HSIP/MED/18/0301/10	45	Supply of ARVs	closed		9/11/18, 10:05 AM	View
3	MAUL-HSIP/MED/18/0401/09	44	Supply of ARVs for 2018 Q4	current			View
4	MAUL-HSIP/MED/18/0301/08	43	Supply of ARVs for 2018 Q3	closed			View

Step 7.1 (b)

Click on the '**View**' button to view the solicitation document



Solicitation Document

Reference: MAUL-HSIP/MED/18/0301/11

Title:	Supply of ARVs for Q4
Created	9/10/18, 4:13 PM
Request Type	Request for Quotation (RFQ)
Bid Validity Period	7 days
Bidding Period	1 days
Issue Date	9/10/18, 4:47 PM
Quotation Submission Date	9/11/18, 10:05 AM
Bid Opening Date	9/11/18, 10:05 AM

Description

MAUL hereby invites you to submit a bid to this invitation for the above referenced object
The attached documents will be divided into various categories. Some of which you will be required to submit back to MAUL after editing.

Step 7.1 (c)

Click on the 'Document Menu' drop down menu. Select the 'View Bids' option.

Document Menu ▾

View Requisition

View Bids

Procurement Method	Invited International Bidding
Procurement Agency Approval	approved on 9/10/18, 4:45 PM
PAC Approval	approved on 9/10/18, 4:46 PM



Bids submitted for MAUL-HSIP/MED/18/0301/11

Public Bid Opening

Preliminary Evaluation Settings

#	Provider Name	Address	City	Primary Contact	Final Submission	Preliminary Evaluation	Commercial Evaluation	Technical Evaluation	Financial Evaluation	Actions
1	EIM Solutions	Kampala Rd	Nairobi	Cecilia Wambui	Final	not done		Not opened	Not done	View Bid
2	Pascale Khayeri Mwavaga	123456	Nairobi	Blaise Pascal	Final	not done		Not opened	Not done	View Bid

Step 7.1 (d)
Click on the 'View Bid' button to view the specific supplier's bid.



Bid for MAUL-HSIP/MED/18/0301/11

[Preliminary Bid Evaluation](#)[Request New Clarification](#)[← Back](#)

Bid

Creation Date: 9/10/18, 5:30 PM

Title: Supply of ARVs for Q4

Provider Name: EIM Solutions

Address: Kampala Rd

Telephone: 0710434157

Fax: Not Provided

Step 7.1 (e)

When viewing supplier bids, the evaluation team and Bid Manager are able to download the bidding documents submitted by the supplier. To accomplish this, click on the 'Attachments' tab.

Details

[List of Supplies Required](#)[Attachments](#)[Price Schedules](#)[Clarifications Requests](#)

Document: Bid Securing Declaration

[View](#)[Download](#)

Document: Specification Compliance Sheet

[View](#)[Download](#)

Document: Bid Submission Sheet

[View](#)[Download](#)

Document: Code of Ethical Conduct

[View](#)[Download](#)

Step 7.1 (f)

Click on the 'Download' button to save the suppliers' bidding documents for further analysis.

Click on the 'View' button to view the documents on a browser window.



Defining Preliminary Evaluation Settings

Some of the criteria used during the preliminary evaluation stage include:

- Completeness of bidding documents
- Eligibility of bidders
- Furnishing of required securities
- Proper signatories in bidding documents

These evaluation criteria need to be defined in the portal. Once you setup preliminary evaluation settings, they will apply to all suppliers. The settings need to be defined only once for the specific bids being evaluated.

Step 7.1 (g)

Click on the 'Preliminary Evaluation Settings' button to define the criteria to be used during preliminary evaluation.

Bids submitted for MAUL-HSIP/MED/18/0301/11

#	Provider Name	Address	City	Primary Contact	Final Submission	Preliminary Evaluation	Com Evaluation	Financial Evaluation	Actions	
1	EIM Solutions	Kampala Rd	Nairobi	Cecilia Wambui	Final	not done		Not opened	Not done	View Bid
2	Pascale Khayeri Mwavaga	123456	Nairobi	Blaise Pascal	Final	not done		Not opened	Not done	View Bid

Bid Opening

Preliminary Evaluation Settings



Preliminary Evaluation Setup

Requirement Name

Require Remarks? - a remarks text area

Add

#	Requirement Name	Need Remarks	Actions
---	------------------	--------------	---------

Close

Step 7.1 (h)

- Enter the criteria name in the 'Requirement Name' field provided.
- Tick on the check box provided if you will require remarks for the criteria created. This is optional.
- Click on the 'Add' button to add the criteria.

procurement.spinprocure.com says

Preliminary setting has been saved successfully.

OK

Step 7.1 (i)

Click on the 'OK' button to complete the creation of the evaluation criteria



Preliminary Evaluation Setup ✕

Requirement Name

Require Remarks? - a remarks text area Add

#	Requirement Name	Need Remarks	Actions
1	Eligibility of Bidder	Yes	Edit Delete
2	Furnishing of required securities	No	Edit Delete
3	Proper signatories in bidding documents	No	Edit Delete
4	Completeness of Bid	Yes	Edit Delete

Close

Repeat **steps 7.1 (h) – 7.1 (i)** to define more criteria. Your preliminary evaluation setup window will look as shown in the image. The system allows **editing** and **deleting** of the criteria parameters.

Step 7.1 (j)
After defining the preliminary evaluation criteria, click on the 'Close' button to exit the setup window.



7.1.1 Preliminary Evaluation - Comply



This section will deal with evaluating a supplier bid with respect to the preliminary evaluation settings defined in Steps 7.1 (a) – 7.1 (h). This supplier will **comply** with stipulated guidelines.

Bids submitted for MAUL-HSIP/MED/18/0301/11

Public Bid Opening

Preliminary Evaluation Settings

#	Provider Name	Address	City	Primary Contact	Final Submission	Preliminary Evaluation	Commercial Evaluation	Technical Evaluation	Financial Evaluation	Actions
1	EIM Solutions	Kampala Rd	Nairobi	Cecilia Wambui	Final	not done		Not opened	Not done	View Bid
2	Pascale Khayeri Mwavaga	123456	Nairobi	Blaise Pascal	Final	not done		Not opened	Not done	View Bid

Step 7.1.1 (a)

Once you have defined the preliminary evaluation settings, click on the 'View' button to begin the preliminary evaluation process for each supplier.



Step 7.1.1 (b)

Click on the 'Preliminary Bid Evaluation' button to open the preliminary evaluation window

Bid for MAUL-HSIP/MED/18/0301/11

[Preliminary Bid Evaluation](#)

[Request New Clarification](#)

[← Back](#)

 **Bid**

Creation Date: 9/10/18, 5:30 PM

Title: Supply of ARVs for Q4

Contact Person: Cecilia Wambui

Provider Name: EIM Solutions

Signing Official: Cecilia Wambui

Address: Kampala Rd

Authorized Official Title: Specialist

Telephone: 0710434157

City: Nairobi

Fax: Not Provided

Details 



Preliminary Evaluation for EIM Solutions



Check compliance of the following documents

#	Requirement Name	Actions
1	Eligibility of Bidder	Evaluate
2	Furnishing of required securities	Evaluate
3	Proper signatories in bidding documents	Evaluate
4	Completeness of Bid	Evaluate

Checked Requirements and Compliance

#	Requirement Name	Compliance Status	Actions
---	------------------	-------------------	---------

Step 7.1.1 (c)
Click on the
'Evaluate' button

Close



Evaluate ✕

Is the **Eligibility of Bidder** requirement satisfied?

Compliance?	<div style="border: 2px solid yellow; padding: 5px;"><p>Comply ▼</p><p style="background-color: #007bff; color: white;">Comply</p><p>Not Comply</p><p>Waiver</p></div>
Remarks	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>

Evaluate

procurement.spinprocure.com says

Preliminary Evaluation for the requirement done successfully.

OK

Step 7.1.1 (d)

- Click on the drop down arrow and select the 'Comply' option provided.
- Enter remarks for the option selected above. This remarks field is defined during configuration of the criteria. If the remarks check box is ticked, this field will be available.

Step 7.1.1 (e)

After completing evaluation, Click on the 'Evaluate' button. Click the 'OK' button to finish the evaluation of the first criteria.



Preliminary Evaluation for EIM Solutions



Check compliance of the following documents

Checked Requirements and Compliance

Requirement Name

Repeat **steps 7.1 (l) – 7.1 (n)** to evaluate more criteria. Once all the criteria has been evaluated, they will be represented on the Right side of the window. Use the 'Amend' button to edit the criteria results.

#	Requirement Name	Compliance Status	Actions
1	Completeness of Bid	C	Ammend
2	Furnishing of required securities	C	Ammend
3	Eligibility of Bidder	C	Ammend
4	Proper signatories in bidding documents	C	Ammend

Next Action - Overall Preliminary evaluation decision

[Overall Preliminary Evaluation](#)

Step 7.1.1 (f)
Click the 'Overall Preliminary Evaluation' button to give an overall evaluation result.

[Close](#)



Overall Preliminary Evaluation for EIM Solutions

Verification

Evaluation Remarks

procurement.spinprocure.com says
Preliminary Evaluation for the requirement done successfully.

Step 7.1.1 (g)

- Click on the drop down arrow and select the 'Comply' option provided.
- Enter Evaluation remarks for the option selected above.
- Click the 'Evaluate' button below to complete the process.



Preliminary Evaluation for EIM Solutions



Check compliance of the following documents

Checked Requirements and Compliance

#	Requirement Name	Actions
1	Completeness of Bid	
2	Furnishing of required securities	
3	Eligibility of Bidder	
4	Proper signatories in bidding documents	

Step 7.1.1 (h)

Click the 'OK' button to close the window

Close



Step 7.1.1 (i)
Click the 'Back' button to return to the bids.

Bid for MAUL-HSIP/MED/18/0301/11

[Preliminary Bid Evaluation](#) [Request New Clarification](#) [← Back](#)

Bid

Creation Date: 9/10/18, 5:30 PM

Title: Supply of ARVs for Q4

Contact Person: Cecilia Wambui

Provider Name: EIM Solutions

Signing Official: Cecilia Wambui

Address: Kampala Rd

Authorized Official Title: Specialist

Telephone: 0710434157

City: Nairobi

Fax: Not Provided



Bids submitted for MAUL-HSIP/MED/18/0301/11

Public Bid Opening


Preliminary Results


Once you have completed the preliminary evaluations for a supplier, the status changes from 'Not Done' to 'Passed'.



#	Provider Name	Address	City	Primary Contact	Final Submission	Preliminary Evaluation	Commercial Evaluation	Technical Evaluation	Financial Evaluation	Actions
1	EIM Solutions	Kampala Rd	Nairobi	Cecilia Wambui	Final	passed		Not opened	Not done	View Bid
2	Pascale Khayeri Mwavaga	123456	Nairobi	Blaise Pascal	Final	not done		Not opened	Not done	View Bid



7.1.2 Preliminary Evaluation – Not Comply

 This section will deal with evaluating a supplier bid with respect to the preliminary evaluation settings defined in Steps 7.1 (a) – 7.1 (h). This supplier will **Not comply** with stipulated guidelines.

 The BM will be required to log into the system and follow **Steps 7.1 (a) – 7.1 (f)** in order to view a supplier's bid contents. The BM will then follow **Steps 7.1.1 (a) – 7.1.1 (c)** to access the 'Evaluation' window where he/ she will select '**Not Comply**' to the specific preliminary evaluation criteria that the supplier has failed to comply.

  **TIP**

The BM will not be required to redefine the preliminary evaluation criteria as they have already been configured as described earlier.



Evaluate ×

Is the **Eligibility of Bidder** requirement satisfied?

Compliance?	Not Comply
Remarks	Not Complied

Evaluate

procurement.spinprocure.com says
Preliminary Evaluation for the requirement done successfully.

OK

Step 7.1.2 (a)

- Click on the drop down arrow and select the 'Not Comply' option provided.
- Enter remarks for the option selected above. This remarks field is defined during configuration of the criteria. If the remarks check box is ticked, this field will be available.

Step 7.1.2 (b)

After completing evaluation, Click on the 'Evaluate' button. Click the 'OK' button to finish the evaluation of the first criteria.



Preliminary Evaluation for Pascale Khayeri Mwavaga



Check compliance of the following documents

Checked Requirements and Compliance

#	Requirement Name	Actions
---	------------------	---------

Once all the criteria has been evaluated, they will be represented on the Right side of the window.
Use the 'Amend' button to edit the criteria results.

#	Requirement Name	Status	Actions
1	Furnishing of required securities	C	Ammend
2	Eligibility of Bidder	NC	Ammend
3	Completeness of Bid	NC	Ammend
4	Proper signatories in bidding documents	NC	Ammend

Next Action - Overall Preliminary evaluation decision

[Overall Preliminary Evaluation](#)

Step 7.1.2 (c)
Click the 'Overall Preliminary Evaluation' button to give an overall evaluation result.

[Close](#)



Overall Preliminary Evaluation for Pascale Khayeri Mwavaga

Verification	Not Comply
Evaluation Remarks	This supplier has not complied with majority of the Preliminary Evaluation criteria.

Evaluate

procurement.spinprocure.com says
Preliminary Evaluation for the requirement done successfully.

OK

Step 7.1.2 (d)

- Click on the drop down arrow and select the 'Not Comply' option provided.
- Enter Evaluation remarks for the option selected above.
- Click the 'Evaluate' button below to complete the process.





IMPORTANT

If a supplier's overall preliminary evaluation result is **'Not Complied'**, they will be disqualified and will not be able to progress to the next evaluation stages

Once you have completed the preliminary evaluations for a supplier, the status changes from **'Not Done'** to **'Failed'** in the case of non-compliance

Bids submitted for MAUL-HSIP/MED/18/0301/11


Public Bid Opening


Preliminary Results



#	Provider Name	Address	City	Primary Contact	Final Submission	Preliminary Evaluation	Commercial Evaluation	Technical Evaluation	Financial Evaluation	Actions
1	EIM Solutions	Kampala Rd	Nairobi	Cecilia Wambui	Final	passed		Not opened	Not done	View Bid
2	Pascale Khayeri Mwavaga	123456	Nairobi	Blaise Pascal	Final	not done		Not opened	Not done	View Bid



7.1.3 Preliminary Evaluation – Waiver

 This section will deal with evaluating a supplier bid with respect to the preliminary evaluation settings defined in Steps **7.1 (a) – 7.1 (h)**. This supplier's bid will be **Waivered**.

 The BM will be required to log into the system and follow **Steps 7.1 (a) – 7.1 (f)** in order to view a supplier's bid contents. The BM will then follow **Steps 7.1.1 (a) – 7.1.1 (c)** to access the '**Evaluation**' window where he/ she will select '**Waiver**' to the specific preliminary evaluation criteria that the supplier has been waived.

  **TIP**

The BM will not be required to redefine the preliminary evaluation criteria; they have already been configured as described earlier.



Evaluate ✕

Is the Proper signatories in bidding documents requirement satisfied?

Compliance?	<div style="border: 1px solid gray; padding: 5px;">Waiver ▾</div>
Remarks	<div style="border: 1px solid gray; padding: 5px;">The supplier's bid is missing a signatory. We will send clarification to request for a newly signed document</div>

Evaluate

procurement.spinprocure.com says

Preliminary Evaluation for the requirement done successfully.

OK

Step 7.1.3 (a)

- Click on the drop down arrow and select the 'Waiver' option provided.
- Enter remarks for the option selected above. This remarks field is defined during configuration of the criteria. If the remarks check box is ticked, this field will be available.

Step 7.1.3 (b)

After completing evaluation, Click on the 'Evaluate' button. Click the 'OK' button to finish the evaluation of the first criteria.



Preliminary Evaluation for Pascale Khayeri Mwavaga



Check compliance of the following documents

Checked Requirements and Compliance

#	Requirement Name	Actions
---	------------------	---------

Once all the criteria has been evaluated, they will be represented on the Right side of the window. Use the 'Amend' button to edit the criteria results.

#	Requirement Name	Compliance Status	Actions
1	Furnishing of required securities	C	Ammend
2	Eligibility of Bidder	C	Ammend
3	Completeness of Bid	C	Ammend
4	Proper signatories in bidding documents	W	Ammend

Next Action - Overall Preliminary evaluation decision

[Overall Preliminary Evaluation](#)

Step 7.1.3 (c)
Click the 'Overall Preliminary Evaluation' button to give an overall evaluation result.

Close



Overall Preliminary Evaluation for Pascale Khayeri Mwavaga

Verification	Waivered
Evaluation Remarks	This supplier has a signatory missing. We have submitted a request for clarification to re-submit the bid documents with discrepancies. The supplier has complied with majority of the preliminary evaluation criteria.

Evaluate

procurement.spinprocure.com says
Preliminary Evaluation for the requirement done successfully.

OK

Step 7.1.3 (d)

- Click on the drop down arrow and select the 'Waivered' option provided.
- Enter Evaluation remarks for the option selected above.
- Click the 'Evaluate' button below to complete the process.





IMPORTANT

If a supplier's overall preliminary evaluation result is **'Waivered'**, they will still be able to progress to the next evaluation stages after proper approvals have been made in the system. This will be explained in the next sections.

The PA HOD and PA Specialist will receive E-mail and E-Procurement portal notifications informing them of the evaluation team's waiver of a supplier's bid.

Once you have completed the preliminary evaluations for a supplier, the status changes from **'Not Done'** to **'Ongoing'** in the case of a waiver.

Bids submitted for MAUL-HSIP/MED/18/0301/11

Public Bid Opening

Preliminary Results

#	Provider Name	Address	City	Primary Contact	Final Submission	Preliminary Evaluation	Commercial Evaluation	Technical Evaluation	Financial Evaluation	Actions
1	Pascale Khayeri Mwavaga	123456	Nairobi	Blaise Pascal	Final	ongoing		Not opened	Not done	View Bid
2	EIM Solutions	Kampala Rd	Nairobi	Cecilia Wambui	Final	passed		Not opened	Not done	View Bid



Preliminary Evaluation – PA HOD/ PA Specialist Review of Waiver

Waivered Preliminary Evaluations

#	Bid Details	Procurement	Reference Number	PA Approval Status	PAC Approval Status	Bid Manager	Date Added	Actions
1	Pascale Khayeri Mwavaga	Supply of ARVs for Q4	MAUL-HSIP/MED/18/0301/11	Under Review	Under Review	Ken Shabola	9/12/18, 12:42 PM	View Details
2	Pascale Khayeri Mwavaga	Supply of ARVs	MAUL-HSIP/MED/18/0301/10	Approved	Approved	Ken Shabola	9/11/18, 10:29 AM	View Details
3	Dummy Supplier	ARVs RFQ	MAUL-PSSP/MED/17/0301/03	Approved	Approved	Paul Ng'ang'a	8/31/17, 1:00 PM	View Details

< previous next >

Page 1 of 1, showing 3 record(s) out of 3 total

Step 7.1.3 (e)
The PA HOD/ PA Specialist will log in to the system and access the main navigation menu. Click on the 'Other Approvals' drop down arrow and select the 'Preliminary Evaluations' option provided.

Step 7.1.3 (f)
Click on the 'View Details' link to start the review process



Preliminary Evaluation Review

Evaluation Status: waived

Details

This supplier has a signatory missing. We have submitted a request for clarification to re-submit the bid documents with discrepancies. The supplier has complied with majority of the preliminary evaluation criteria.

Created: 🕒 Wednesday, September 12, 2018 at 12:42 PM , Bid manager: 👤 Ken , Bid Solicitation: 📁 Supply of ARVs for Q4 , Reference number: ● MAUL-HSIP/MED/18/0301/11

Review and Send to PAC

View the details of the waiver as explained by the evaluation team before approval/ rejection of waiver.

Step 7.1.3 (g)

Click on the 'Review and Send to PAC' button.



Send Preliminary Evaluation to PAC ×

Send to PAC	<input type="text" value="Yes"/>
Remarks	<input type="text" value="The waiver is in order."/>

Step 7.1.3 (h)

- Click on the drop down arrow and select the options provided.
- Enter remarks in the remarks field relating to the option selected above.
- Click on the 'Submit' button to complete the review process.

Once the PA HOD/ PA Specialist has completed the review process and submitted to the PAC team, the Bid Manager will receive both E-mail and system notifications on the review results.

PAC team members will also receive E-mail and system notifications on the Preliminary Evaluation Request.



Preliminary Evaluation – PAC Approval of Waiver

Step 7.1.3 (i)
The PAC team member will log in to the system and access the main navigation menu. Click on the 'Other Approvals' drop down arrow and select the 'Preliminary Evaluations' option provided.

#	Bid Details	Procurement	Reference Number	PA Approval Status	PAC Approval Status	Bid Manager	Date Added	Actions
1	Pascale Khayeri Mwavaga	Supply of ARVs for Q4	MAUL-HSIP/MED/18/0301/11	Approved	Under Review	ken	9/12/18, 12:42 PM	View Details
2	Pascale Khayeri Mwavaga	Supply of ARVs	MAUL-HSIP/MED/18/0301/10	Approved	Approved	ken	9/11/18, 10:29 AM	View Details
3	Dummy Supplier	ARVs RFQ	MAUL-PSSP/MED/17/0301/03	Approved	Approved	poll	8/31/17, 1:00 PM	View Details

Step 7.1.3 (j)
Click on the 'View Details' link to start the approval process



Preliminary Evaluation Review

Evaluation Status: waived

Details

This supplier has a signatory missing. We have submitted a request for clarification to re-submit the bid documents with discrepancies. The supplier has complied with majority of the preliminary evaluation criteria.

Created:  Wednesday, September 12, 2018 at 12:42 PM , Bid manager:  Ken , Bid Solicitation:  Supply of ARVs for Q4 , Reference number:  MAUL-HSIP/MED/18/0301/11

Review and Approval

View the details of the waiver as explained by the evaluation team before approval/ rejection of waiver.

Step 7.1.3 (k)

Click on the 'Review and Approval' button.



Note: If PAC rejects the waiver done by the evaluation team, the supplier's bid will not be able to move on to the next evaluation stages i.e. commercial, technical, and financial.




PAC Approval of the Preliminary Evaluation ×

PAC Approval	Approved
Remarks	PAC has approved the request
Attach Minutes	<input type="button" value="Choose file"/> PAC Minutes.pdf

Step 7.1.3 (I)

- Click on the drop down arrow and select the options provided.
- Enter the PAC decision as discussed in the scheduled PAC meeting. The remarks should explain the selection above.
- Attach PAC minutes in the attachment field provided.
- Click on the 'Submit' button to complete the approval process.

 **IMPORTANT**
Make sure your attachment file is in PDF format

The remarks has been saved successfully. Notifications has been sent to bid manager.



Viewing Preliminary Evaluation Results

Once the preliminary evaluations are fully completed, the status will change accordingly depending on the overall decision made by the evaluation team.

[Public Bid Opening](#) [Preliminary Results](#) [Generate Technicals](#)

Bids submitted for MAUL-HSIP/ME

#	Provider Name	Address	City	Primary Contact	Submission Status	Preliminary Evaluation	Commercial Evaluation	Technical Evaluation	Financial Evaluation	Actions
1	Pascale Khayeri Mwavaga	123456	Nairobi	Blaise Pascal	Final	passed		Not opened	Not done	View Bid
2	EIM Solutions	Kampala Rd	Nairobi	Cecilia Wambui	Final	passed		Not opened	Not done	View Bid

[< previous](#) [next >](#)

Page 1 of 1, showing 2 record(s) out of 2 total



Bids submitted for MAUL-HSIP/MED/18/0101/01

[Preliminary Results](#)

Step 7.1.3 (m)
Click on the 'Preliminary Results' button to open the results window

#	Provider Name	Primary Contact	Final Submission	Preliminary Evaluation	Commercial Evaluation	Technical Evaluation	Financial Evaluation	Actions
1	Dummy Supplier	John Kamau	Final	passed	Not opened	Not opened	Not done	View Bid
2	Tims Company	Tim Mbogo	Final	passed	Not opened	Not opened	Not done	View Bid
3	EIM Solutions	Cecilia Wambui	Final	passed	Not opened	Not opened	Not done	View Bid

Products to be Supplied

#	Product	Pack Size	Quantity
1	Efavirenz 50mg, Capsules, 30 Caps	30	1,000
2	Abacavir 60mg, Tablets, 30 Tabs	30	1,000
3	Atazanavir 300mg, Capsules, 30 Caps	30	1,000

Bid managers & evaluators

#	Bid Manager(s)
1	Ken Shabola

#	Evaluators
1	Andrew Muhenda
2	Emma Emma



Preliminary evaluation results for MAUL-HSIP/MED/18/0301/11

[← Back to Bids](#)[Print Results](#)[Export To CSV](#)

Summary


#	Requirements Check	EIM Solutions	Pascale Khayeri Mwavaga
1	Eligibility of Bidder	C	C
2	Proper signatories in bidding documents	C	W
3	Completeness of Bid	C	C
4	Furnishing of required securities	C	C
Conclusion		C	W

Legend

- C - Compliant
- NC - Not Compliant
- W - Waivered



7.2 Request For Clarification During Evaluation

 This section will deal with sending a request for clarification to a supplier. During the various stages of evaluation (Preliminary, Commercial, Technical, and Financial), the evaluation team may have inquiries that need clarifications from bidders. The evaluation team can be able to send clarification requests via the e-Procurement portal. Responses from bidders will also be received in the portal. The BM will be responsible for initiating the process.



TIP

The request for clarification process is the same for all evaluation stages. The system provides drop down options for users to select the stages that are applicable for the request



Bids submitted for MAUL-HSIP/MED/18/0301/11

Public Bid Opening

Preliminary Evaluation Settings

#	Provider Name	Address	City	Primary Contact	Final Submission	Preliminary Evaluation	Commercial Evaluation	Technical Evaluation	Financial Evaluation	Actions
1	EIM Solutions	Kampala Rd	Nairobi	Cecilia Wambui	Final	not done		Not opened	Not done	View Bid
2	Pascale Khayeri Mwavaga	123456	Nairobi	Blaise Pascal	Final	not done		Not opened	Not done	View Bid

Step 7.2 (a)

The Bid Manager will follow Steps 7.1 (a) – 7.1 (c)


Once these steps are done, click on the 'View' button to access the Request for Clarification functionality.



Step 7.2 (b)
Click on the 'Request New Clarification' button to access the Request for Clarification window.

Bid for MAUL-HSIP/MED/18/0301/11

[Request New Clarification](#) [← Back](#)

 **Bid** Creation Date: 9/10/18, 5:12 PM

Title: Supply of ARVs for Q4	Contact Person: Blaise Pascal
Provider Name: Pascale Khayeri Mwavaga	Signing Official: Blaise Pascal
Address: 123456	Authorized Official Title: Managing Director
Telephone: (+254) 720 123 456	City: Nairobi
Fax: Not Provided	



Request Pascale Khayeri Mwavaga for clarification

Type Preliminary

Subject Request for proper signatories in bidding documents

Attachment No file chosen

Message to Suppliers
Dear Supplier,
We are currently conducting the Preliminary Evaluation of pre-qualified suppliers' bids. We have noted that you have complied

Memo to Procurement Team
PA Team,
This supplier has complied with majority of the preliminary evaluation criteria. Some of their bidding documents are missing

Clarification Response Settings

Allow Supplier to Attach Files while responding?

Maximum Allowed Files Number

Add Document

Step 7.2 (d)

Click on the 'Add Document' button to get necessary approvals.

Step 7.2 (c)

- Click on the drop down arrow and select the evaluation stages provided (Preliminary, Technical, or Financial).
- Enter the subject matter
- Attach any relevant document to send to the supplier
- Enter the message to the supplier you wish to request for clarification.
- Enter a brief memo to the PA team to describe the reasons for sending the request.
- If you want the supplier to attach documents while responding, tick the check box provided
- Indicate the maximum number of attachments allowed when bidders are responding to the request.

The clarification document has been added. The document has been sent to the procurement team for approval.

Close

PA HOD/ PA Specialist Review of Request For Clarification



The **PA HOD** or **PA Specialist** will be required to review the preliminary request for clarification that was generated by the Bid Manager. The **PA HOD** or the **PA Specialist** will be required to log into the e-Procurement portal to perform the required tasks.

The screenshot displays the 'Evaluation Clarifications Approval' interface. On the left is a dark navigation menu with the following items: Notifications, Configure Procurement, Catalogue, Suppliers Management, Requisitions, Solicitations Management, Other Approvals, Evaluations Clarifications (highlighted in yellow), and Price Negotiations Approvals. The main content area shows a table with 7 rows of data. The first row is highlighted with a yellow box around the 'View' button. A yellow callout box points to this button with the text: 'Step 7.2 (f) Click on the 'View' button to access the request for clarification.' Another yellow callout box points to the 'Evaluations Clarifications' menu item with the text: 'Step 7.2 (e) On the main navigation menu, click on the 'Other Approvals' drop down menu. Select the 'Evaluations Clarifications' option.' The table data is as follows:

Id	Clarification Type	Bid Manager	Reference Number	PA Approval Status	PAC Approval Status	Subject	Request Date	Actions
1	preliminary	Ken Shabola	MAUL-HSIP/MED/18/0301/11	Pending approval	Pending approval	Request for proper signatories in bidding documents	9/12/18, 1:36 PM	View
2	preliminary	Ken Shabola	MAUL-HSIP/MED/17/0401/12	Sent To Suppliers	Approved	Test Form Behavior	2/9/18, 11:00 AM	View
3	preliminary	Dennis Kibunja	MAUL-PSSP/MED/17/0301/04	Sent To Suppliers	Sent to Suppliers		9/17, 1:23 PM	View
4	preliminary	Dennis Kibunja	MAUL-PSSP/MED/17/0301/04	Sent To Suppliers	Sent to Suppliers		9/18/17, 9:57 AM	View
5	financial	Dennis Kibunja	MAUL-PSSP/MED/17/0301/04	Sent To Suppliers	Sent to Suppliers		9/18/17, 9:42 AM	View
			PSSP/MED/17/0301/04	Approved	Pending approval	Test Preliminary	9/6/17, 11:57 AM	View
			PSSP/MED/17/0301/03	Sent To Suppliers	Sent to Suppliers	Test Clarification Request	9/4/17, 12:31 PM	View

Page 1 of 1, showing 7 record(s) out of 7 total

Step 7.2 (g)

Click on the 'Edit' button to add additional information to the request such as 'Memo to PAC'

Edit

Approval

View Bid

← Back

Clarification Status: **In Approval**

Procurement Reference: **MAUL-HSIP/MED/18/0301/11**

Clarification Subject: **Request for proper signatories in bidding documents**

Supplier Requested: **Pascale Khayeri Mwavaga**

Clarification Request Type: **preliminary**

Message to Supplier

Dear Supplier,
We are currently conducting the Preliminary Evaluation of pre-qualified suppliers' bids. We have noted that you have complied with some of the evaluation criteria however some of your bidding documents have a discrepancy in signatories. Please check all your submitted attachments and make sure relevant signatories have been included. Re-submit the documents with issues.

Kind Regards,
MAUL Evaluation Team.

Memo to Procurement Team

PA Team,
This supplier has complied with majority of the preliminary evaluation criteria. Some of their bidding documents are missing some signatories. We have requested that they re-submit these documents with relevant signatories. We will waiver their bid.

Evaluation Team.

Memo to PAC

Attachment

Evaluation Clarification Settings

Allow Supplier to Attach Documents: **Yes**

Maximum Allowed Attachments: **5**

Remarks

The PA HOD/ PA Specialist can review the contents of the request for clarification before making updates.



Edit Request for Clarification



Subject

Request for proper signatories in bidding documents

Attachment (file shall replace existing file)

No file chosen

Step 7.2 (h)

Add a Memo to PAC in the field provided. The Memo should give a brief explanation of the request for clarification to aid PAC in making a well informed decision.

Message to Suppliers

Dear Supplier,
We are currently conducting the Preliminary Evaluation of pre-qualified suppliers' bids. We have noted that you have complied

Message to PAC

Dear PAC Team,
This supplier has complied with majority of the preliminary evaluation criteria. Some of their bidding documents are missing

Step 7.2 (i)

Click on the 'Update Document' button to complete the update.



Step 7.2 (j)

Click on the 'Approval' button to access the clarification request approval window.

Evaluation - Request for clarification

Approval

View Bid

← Back

Clarification Status: **In Approval**

Procurement Reference: **MAUL-HSIP/MED/18/0301/11**

Clarification Subject: **Request for proper signatories in bidding documents**

Supplier Requested: **Pascale Khayeri Mwavaga**

Clarification Request Type: **preliminary**

Message to Supplier

Dear Supplier,

We are currently conducting the Preliminary Evaluation of pre-qualified suppliers' bids. We have noted that you have complied with some of the evaluation criteria however some of your bidding documents have a discrepancy in signatories. Please check all your submitted attachments and make sure relevant signatories have been included. Re-submit the documents with issues.

Kind Regards,
MAUL Evaluation Team.

Memo to Procurement Team

PA Team,

This supplier has complied with majority of the preliminary evaluation criteria. Some of their bidding documents are missing some signatories. We have requested that they re-submit these documents with relevant signatories. We will waive their bid.

Evaluation Team.

Memo to PAC

Attachment

Evaluation Clarification Settings

Allow Supplier to Attach Documents: **Yes**

Maximum Allowed Attachments: **5**

Remarks

The PA HOD/PA Specialist can review the contents of the request for clarification before sending to supplier of PAC members.



Clarification Request Approval

Approval Pending

Remarks

- Pending
- Request Change
- Approve and Send to PAC**
- Send To Supplier
- Reject

Submit Close

Step 7.2 (k)

- Click on the drop down arrow and select the approval options provided. In this case '**Approve and Send to PAC**'
- Enter remarks to give an explanation on the option selected above.
- Click on the '**Submit**' button below to complete the review process by PA HOD/ PA Specialist



IMPORTANT

The PA HOD/ PA Specialist is at liberty to send the request for clarification directly to the suppliers instead of submitting to the PAC team.



PAC Approval of Request For Clarifications

Once the **PA HOD** or **PA Specialist** has reviewed the preliminary evaluation request for clarification, he/ she can forward the request to PAC for further review and approval. A designated PAC Team member will be required to log in to the system and perform necessary approval tasks.

Step 7.2 (l)
On the main navigation menu, the PAC Team member will click on the 'Other Approvals' drop down menu. Select the 'Evaluations Clarifications' option.

Step 7.2 (m)
Click on the 'View' button to access the request for clarification.

Id	Bid Manager	Reference Number	Approval Status	Subject	Request Date	Actions
1	Ken Shabola	MAUL-HSIP/MED/18/0301/11	Pending approval	Request for proper signatories in bidding documents	9/12/18, 1:36 PM	View
2	Ken Shabola	MAUL-HSIP/MED/17/0401/12	approved	Test Form Behavior	2/9/18, 11:47 AM	View
3	Dennis Kibunja	MAUL-PSSP/MED/17/0301/04	Pending approval	Test Preliminary	AM	View

Showing 1 to 3 of 3 entries

Previous 1 Next

- Notifications
- Catalogue
- Requisitions
- Solicitations Management
- Other Approvals
- Evaluations
- Awards
- Contract Management
- Reports

Evaluation - Request for clarification

Clarification Status: **In Approval**

Procurement Reference: **MAUL-HSIP/MED/18/0301/11**

Clarification Subject: **Request for proper signatories in bidding documents**

Supplier Requested: **Pascale Khayeri Mwavaga**

Clarification Request Type: **preliminary**

Message to Suppliers

Dear Supplier,
 We are currently conducting the Preliminary Evaluation of pre-qualified suppliers' bids. We have noted that you have complied with some of the evaluation criteria however some of your bidding documents have a discrepancy in signatories. Please check all your submitted attachments and make sure relevant signatories have been included. Re-submit the documents with issues.

Kind Regards,
 MAUL Evaluation Team.

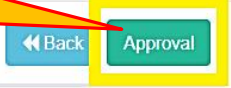
Memo to PAC

Dear PAC Team,
 This supplier has complied with majority of the preliminary evaluation criteria. Some of their bidding documents are missing some signatories. We have requested that they re-submit these documents with relevant signatories. We will waiver their bid.

PA Specialist Team.

Attachments

Step 7.2 (n)
 Click on the 'View' button to access the request for clarification.



Procurement Specialist
Status: Approved - Please approve the request from Evaluation Team
 Created: Wednesday, September 12, 2018 at 3:46 PM

The PAC Team members can review the contents of the request for clarification before approval.



Clarification Request Approval ✕

Approval	Pending
Remarks	Pending Approve Reject
Attach Minutes	<input type="button" value="Choose file"/> PAC Minutes.pdf

Step 7.2 (o)

- Click on the drop down arrow and select the approval options provided. In this case '**Approve**'
- Enter PAC Decision as discussed in the scheduled PAC meeting to give an explanation on the option selected above.
- Attach PAC minutes in the attachment field provided. This is optional
- Click on the '**Submit**' button below to complete the approval process by PAC



IMPORTANT

Make sure your attachment file is in PDF format



PA HOD/ PA Specialist submission of Request For Clarifications to Suppliers

Once the **PAC Team** has approved the request for clarification, the PA HOD/ PA Specialist will send the clarification to the supplier. The PA HOD/ PA Specialist will:

- Log in to the e-Procurement portal
- Follow steps 7.2 (e) → 7.2 (f) → 7.2(j) to access the 'Clarification Request Approval' window below.

Clarification Request Approval

Approval	Send To Supplier
Remarks	Request for clarification Sent to supplier

Submit Close

Step 7.2 (p)

- Click on the drop down arrow and select the 'Send to Supplier' option provided.
- Enter remarks to give an explanation on the option selected above.
- Click on the 'Submit' button below to complete the submission process



Receiving Clarification Responses from Bidders

Once bidders respond to evaluation clarifications, the evaluation team and bid manager will be able to view the response. The PA Bid Manager will:

- Log in to the e-Procurement portal
- Follow steps 7.1 (a) – 7.1 (d) to access the specific supplier's bid.
- Click the 'Clarification Requests' tab to view the response. **See image below**

Bid

Creation Date: 9/10/18, 5:12 PM

Title: Supply of ARVs for Q4
Provider Name: Pascale Khayeri Mwavaga
Address: 123456
Telephone: (+254) 720 123 456
Fax: Not Provided

Contact Person: Blaise Pascal
Signing Official: Blaise Pascal
Authorized Official Title: Managing Director
City: Nairobi

Details

List of Supplies Required | Attachments | Price Schedules | **Clarifications Requests**

#	Subject	Clarification Type	Request Date	Supplier Responded?	Actions
1	Request for proper signatories in bidding documents	preliminary	9/12/18, 1:36 PM	Yes	View Details

Step 7.2 (q)

Click on the 'Clarification Requests' tab to view the supplier's response.

Step 7.2 (r)

Click on the 'View Details' button to view response details and attachments sent by suppliers.



Memo to Procurement Team

PA Team,

This supplier has complied with majority of the preliminary evaluation criteria. Some of their bidding documents are missing some signatories. We have requested that they re-submit these documents with relevant signatories. We will waiver their bid.

Evaluation Team.

Memo to PAC

Dear PAC Team,

This supplier has complied with majority of the preliminary evaluation criteria. Some of their bidding documents are missing some signatories. We have requested that they re-submit these documents with relevant signatories. We will waiver their bid.

PA Specialist Team.

Attachment

Once you execute **Step 7.2 (r)**, the request for clarification window will be displayed. Scroll down to see the supplier response as shown in the image.

Supplier Response Details

Dear MAUL Evaluation Team,

Thank you for the clarification. Attached please find all returnable bidding documents with relevant signatories.


Kind Regards,


#	Attachment name	Actions
1	Bid Submission Sheet.pdf	View Download



7.3 Commercial Evaluation

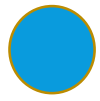
 The commercial evaluation stage involves comparison of cost related items and conditions among the various bidders.

 The Bid Manager will be responsible for completing this evaluation within the system. This will be done on screen/projector during evaluation team meeting. The Bid Manager will therefore be required to log into the system and post relevant commercial evaluation transactions.

 Some of the criteria used during commercial evaluation stage may include:

- Conditions of Contract
- Payment Terms
- Acceptable Delivery Schedule
- Proposed currency
- Bond and Insurance
- Guarantee and Liability





The Bid Manager will follow **Steps 7.1 (a) – 7.1 (d)** to view a particular supplier's bid and access the commercial evaluation functionality.

Step 7.3 (a)

Click on the 'Commercial Evaluation' button to open the results valuation window

Bid for MAUL-HSIP/MED/18/0301/11

Preliminary Evaluation Complete

Commercial Evaluation

Request New Clarification

← Back



Bid

Creation Date: 9/10/18, 5:12 PM

Title: Supply of ARVs for Q4

Contact Person: Blaise Pascal

Provider Name: Pascale Khayeri Mwavaga

Signing Official: Blaise Pascal

Address: 123456

Authorized Official Title: Managing Director

Telephone: (+254) 720 123 456

City: Nairobi

Fax: **Not Provided**

Details



Commercial Evaluation - Settings

Commercial evaluation is executed against various criteria. These evaluation criteria need to be defined in the portal as was the case during preliminary evaluation. Once these parameters have been setup, they will apply to all suppliers. The settings need to be defined only once for the specific bids being evaluated.

The screenshot shows a web form for setting evaluation parameters. It features three main sections: 'Select Parameter' with a dropdown menu showing 'Conditions of Contract' and a 'New Parameter?' button; 'Assesment' with a dropdown menu showing 'Responsive'; and 'Remarks' with a large text input area. A green 'Evaluate' button is located at the bottom left of the form.

Step 7.3 (b)
Click on the 'New Parameter' button to begin defining the criteria to be used during commercial evaluation.



New Commercial Evaluation Parameter ✕

Parameter Name	Proposed Currency
Description	This is the currency used by the Supplier in the bid.

Add

procurement.spinprocure.com says
Parameter added successfully.

Close

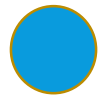
OK

Step 7.3 (c)

- Enter the parameter name in the field provided.
- Enter a brief description about the new parameter. This is optional.
- Click on the 'Add' button below to complete the process.

Note
Repeat **Steps 7.2 (b) and 7.2 (c)** to add more commercial evaluation parameters.





Once the commercial evaluation criteria is defined, the evaluation team can begin to compare bidders against the various parameters.

Select Parameter	Conditions of Contract
Assesment	Bond and Insurance Guarantee and Liability Proposed Currency Conditions of Contract
Remarks	Payment Terms Acceptable Delivery Schedule

Step 7.3 (d)
Click on the parameter drop down arrow and select the options provided.

Assesment	Responsive
Remarks	Responsive Not Responsive

Step 7.3 (e)
Click on the Assessment drop down arrow and select the options provided (Responsive, Not Responsive, or Waivered).

Remarks	The bidder has passed this criteria
Evaluate	

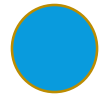
Step 7.3 (f)
Enter remarks in the field provided. This is optional.

Step 7.3 (g)
Click on the 'Evaluate' button to complete evaluation of the first parameter.

procurement.spinprocure.com says
Commercial evaluation done successfully.

OK





Repeat Steps 7.3 (d) – (g) to complete analysis for other commercial evaluation criteria. Once this is done, the commercial results for the particular bidder will appear at the bottom part of the commercial evaluation window as shown in the image below. Repeat the same evaluation process for other bidders.

Commercial Evaluation Results

#	Parameter of Commercial Evaluation	Assesment	Actions
1	Guarantee and Liability	R	View Edit Remove
2	Conditions of Contract	R	View Edit Remove
3	Proposed Currency	R	View Edit Remove
4	Payment Terms	R	View Edit Remove
5	Acceptable Delivery Schedule	R	View Edit Remove
6	Bond and Insurance	R	View Edit Remove

Legend

- R - Responsive
- NR - Not Responsive



Completing Commercial Evaluation

Step 7.3 (h)

Click on the 'Complete Commercial Evaluation' button to complete the process.

Note

Use this functionality after you have completed the Commercial Evaluation tasks for ALL Bidders

Complete Commercial Evaluation

Bids submitted for MAUL-HSIP/MED/18/0201/17

#	Provider Name	Primary Contact	Final Submission	Preliminary Evaluation	Commercial Evaluation	Technical Evaluation	Financial Evaluation	Actions
1	EIM Solutions	Cecilia Wambui	Final	passed	ongoing	Not opened	Not done	View Bid
2	Pascale Mwavaga	Blaise Pascal	Final	passed	ongoing	Not opened	Not done	View Bid

The commercial evaluation has been marked as completed for this bid solicitation.

procurement.spinprocure.com says

Are you sure you want to complete the commercial evaluation?

OK

Cancel

Viewing Commercial Evaluation Results

Step 7.3 (i)
Click on the 'Commercial Evaluation Results' button to view overall commercial evaluation results.

The commercial evaluation has been marked as completed for this bid

Bids submitted for MAUL-HSIP/MED/18/0201/17

Preliminary Results Generate Technicals **Commercial Evaluation Results**

#	Provider Name	Primary Contact	Final Submission	Preliminary Evaluation	Commercial Evaluation	Technical Evaluation	Financial Evaluation	Actions
1	EIM Solutions	Cecilia Wambui	Final	passed	done	Not opened	Not done	View Bid
2	Pascale Mwavaga	Blaise Pascal		passed	done	Not opened	Not done	View Bid

Once you have completed Commercial evaluations for the bidders, the status changes from 'Ongoing' to 'Done'.



Commercial Evaluation Results for MAUL-HSIP/MED/18/0301/11

[← Back to Bids](#)[Print](#)

#	Parameters of Commercial Evaluation	EIM Solutions	Pascale Khayeri Mwavaga
1	Acceptable Delivery Schedule	R	R
2	Bond and Insurance	R	R
3	Conditions of Contract	R	R
4	Guarantee and Liability	R	R
5	Payment Terms	R	R
6	Proposed Currency	R	R


Legend


- R - Responsive
- NR - Not Responsive



7.4 Technical Evaluation

 The technical evaluation stage involves evaluating bids by studying and testing bidder samples to determine technical suitability of goods and services specified in the bid.

 The Bid Manager will be responsible for completing this evaluation within the system. This will be done on screen/projector during evaluation team meeting. The Bid Manager will therefore be required to log into the system and post relevant technical evaluation transactions.

 In the case of MAUL, the Specification Compliance Sheet will be used for this process. Each bidder is required to upload a fully filled Specification compliance sheet while submitting a bid. The technical evaluation will involve personnel who are have relevant expertise in evaluating the technical requirements.





The Bid Manager will follow **Steps 7.1 (a) – 7.1 (c)** to access the technical evaluation functionality (**Generate Technicals**).

Bids submitted for MAUL-HSIP/MED/18/0101/01

Evaluate Technicals

Preliminary Results

Commercial Evaluation Results

Step 7.4 (a)

After clicking on **Generate Technicals** button, click on the **'Evaluate Technicals'** button.

#	Provider Name	Primary Contact	Final Submission	Preliminary Evaluation	Technical Evaluation	Financial Evaluation	Actions
1	Dummy Supplier	John Kamau	Final		not complete	Not done	View Bid
2	EIM Solutions	Cecilia Wambui	Final	passed	done	not complete	View Bid
3	Tims Company	Tim Mbogo	Final	passed	done	not complete	View Bid

Products to be Supplied

#	Product	Pack Size	Quantity
1	Efavirenz 50mg, Capsules, 30 Caps	30	1,000
2	Abacavir 60mg, Tablets, 30 Tabs	30	1,000
3	Atazanavir 300mg, Capsules, 30 Caps	30	1,000

Bid managers & evaluators

#	Bid Manager(s)
1	Ken Shabola

#	Evaluators
1	Andrew Muhenda
2	Emma Emma



Select Provider Name

Dummy Supplier

Load Technical Evaluation Data

Step 7.4 (b)

Click on the drop down arrow and select a bidder.

Step 7.4 (c)

Click on the 'Load Technical Evaluation Data' button



Select Provider Name

[Load Technical Evaluation Data](#)

Provider Name : **Dummy Supplier**

Evaluation Status : **on-going**

#	Product	Verification	Remarks	Download	Evaluations Tab
1	Efavirenz 50mg, Capsules, 30 Caps	default			Evaluate
2	Atazanavir 300mg, Capsules, 30 Caps	default			Evaluate
3	Abacavir 60mg, Tablets, 30 Tabs	default			Evaluate

Step 7.4 (d)
Click on the 'Evaluate' button.



Technical Evaluation of Efavirenz 50mg, Capsules, 30 Caps



Verification

Comply

Attachment (Optional)

Choose file No file chosen

Evaluation Remarks

✓ Submit Evaluation

Close

Step 7.4 (e)

- Click on the 'Verification' drop down arrow and select the options provided
- Upload a relevant attachment file in the **Attachment** area
- Provide **Evaluation Remarks** for the evaluation decision made for the specific item.



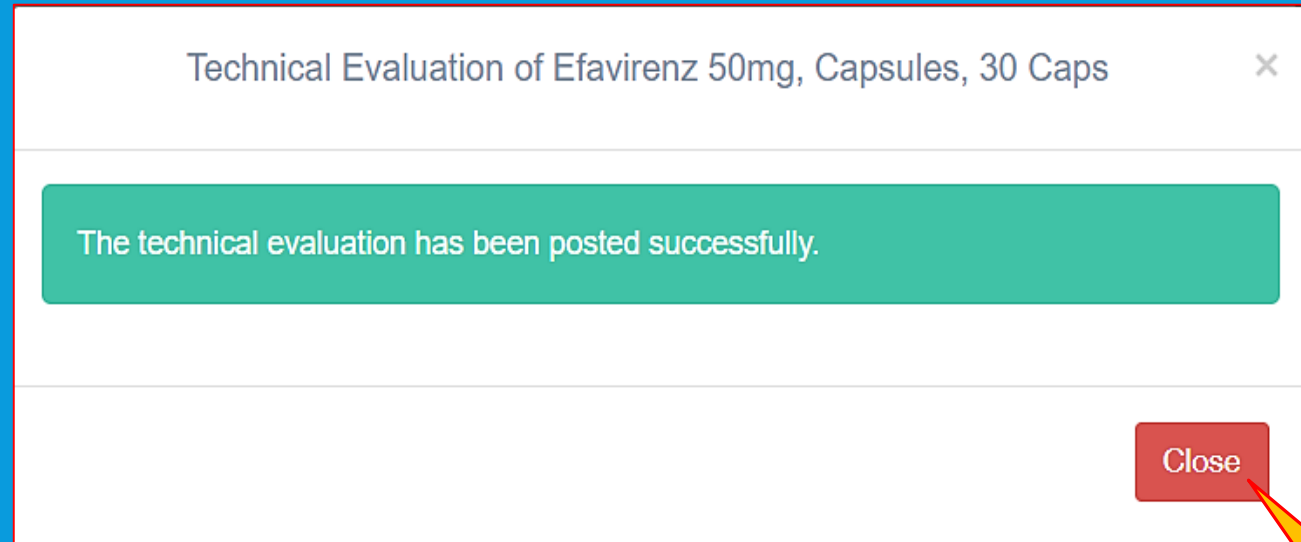
IMPORTANT

Make sure your attachment file is in PDF format

Step 7.4 (f)

Click on the 'Submit Evaluation' button.





To evaluate the technical requirements for other items in the list, repeat **Steps 7.4 (d) – (g)** as described.

Step 7.4 (g)
Click on the 'Close' button.



MAUL-HSIP/MED/18/0101/01 - Technical Evaluation

← Back

Note:
Repeat **Step 7.4 (b) – 7.4 (g)** to complete Technical Evaluation for other bidders.

Step 7.4 (h)
Click on the 'Back' button to view the Technical Results.

Select Provider Name

Load Technical Evaluation Data

Once the technical evaluation is complete, the results will be posted as shown in the image.

Provider Name : **Dummy Supplier**

Evaluation Status : **complete**

#	Product	Verification	Remarks	Download	Evaluations Tab
1	Efavirenz 50mg, Capsules, 30 Caps	comply			Ammend Evaluation Reset to Default
2	Atazanavir 300mg, Capsules, 30 Caps	comply			Ammend Evaluation Reset to Default
3	Abacavir 60mg, Tablets, 30 Tabs	comply			Ammend Evaluation Reset to Default



Viewing Technical Evaluation Results

Bids submitted for MAUL-HSIP/MED/18/0101/01

Evaluate Technicals

Request Financial Opening Approval

Preliminary Results

Commercial Evaluation Results

Technical Results

#	Provider Name	Primary Contact	Final Submission	Preliminary Evaluation	Commercial Evaluation	Technical Evaluation	Commercial Evaluation Results	Actions
1	Dummy Supplier	John Kamau	Final	passed	done	complete	Not done	View Bid
2	EIM Solutions	Cecilia Wambui	Final	passed	done	complete	Not done	View Bid
3	Tims Company	Tim Mbogo	Final	passed	done	complete	Not done	View Bid

Step 7.4 (i)

Click on the 'Technical Results' button to view overall technical evaluation results.

Products to be Supplied

#	Product	Pack	Price
1	Efavirenz 50mg, Capsules, 30 Caps	30	
2	Abacavir 60mg, Tablets, 30 Tabs	30	1,000
3	Atazanavir 300mg, Capsules, 30 Caps	30	1,000

Once you have completed the technical evaluations for a supplier, the status changes from 'Not Complete' to 'Complete'.

Bid managers & evaluators

#	Bid Manager(s)
1	Ken Shabola

#	Evaluators
1	Andrew Muhenda
2	Emma Emma



Technical evaluation results for MAUL-HSIP/MED/18/0101/01

[← Back to Bids](#) [Print Results](#)

1. Item Name: Efavirenz 50mg, Capsules, 30 Caps | **Quantity:** 1000 | **Unit of Measure:** pack

#	Provider Name	Verification	Remarks	Action
1	Dummy Supplier	comply		
2	Tims Company	comply		
3	EIM Solutions	comply		

2. Item Name: Atazanavir 300mg, Capsules, 30 Caps | **Quantity:** 1000 | **Unit of Measure:** pack

#	Provider Name	Verification	Remarks	Action
1	Dummy Supplier	comply		
2	Tims Company	comply		
3	EIM Solutions	comply		

3. Item Name: Abacavir 60mg, Tablets, 30 Tabs | **Quantity:** 1000 | **Unit of Measure:** Pack

#	Provider Name	Verification	Remarks	Action
1	EIM Solutions	comply		
2	Dummy Supplier	comply		
3	Tims Company	comply		



7.5 Financial Evaluation

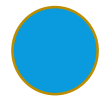
The Financial evaluation stage involves evaluating bids to confirm that the prices of goods and services submitted by bidders go through the appropriate checks and balances, and ensure that bids are properly ranked in terms of price. Financial Evaluation will be performed when Technical Evaluation is completed.

The Bid Manager will be responsible for completing this evaluation within the system. This will be done on screen/projector during evaluation team meeting. The Bid Manager will therefore be required to log into the system and post relevant Financial evaluation transactions.

Financial Bid Opening approval may be required if this setting (**Approval Before Financial Opening**) was applied during preparation of the solicitation document (**See Section 4.4.4**). The Bid Manager will submit a request for approval to PAC. A PAC member will be required to log in to the e-Procurement Portal to approve the request.

Price Benchmarking will also be executed if the setting is enabled during preparation of the solicitation document.





The Bid Manager will follow **Steps 7.1 (a) – 7.1 (c)** to access the 'Request Financial Opening Approval' functionality. The PAC Team members will receive a system notification on the approval.

Step 7.5 (a)

Click on the 'Request Financial Opening Approval' button

Bids submitted for MAUL-HSIP/MED/18/0301/11

Public Bid Opening

Request Financial Opening Approval

Preliminary Results

Commercial Evaluation Results

Technical Results

#	Provider Name	Address	City	Primary Contact	Final Submission	Preliminary Evaluation	Commercial Evaluation	Technical Evaluation	Financial Evaluation	Actions
1	Pascale Khayeri Mwavaga	123456	Nairobi	Blaise Pascal	Final	passed		complete	Not done	View Bid
2	EIM Solutions	Kampala Rd	Nairobi	Cecilia Wambui	Final	passed		complete	Not done	View Bid



Financial Bid Opening PAC Approval Request

Reference Number

MAUL-HSIP/MED/18/0301/11

Title

Supply of ARVs for Q4

Request Message

Dear PAC Team,

Kindly approve Financial Bid Opening. Thank you

|
Bid Manager

Request Approval

Cancel

Step 7.5 (b)

Enter relevant remarks in the 'Request Message' field provide.

Step 7.5 (c)

Click on the 'Request Approval' button.

The financial opening request has been sent to PAC.



Financial Evaluation – PAC Approval of Financial Opening Request

A PAC member will be required to log in to the portal and approve the Financial Opening request sent by the Bid Manager. The approval window can be accessed by the PAC member in two (2) ways:

1. System Notifications

- Access the system notification icon located at the top right hand-side and retrieve the Financial Opening Request Notification
- Access system notification on the main menu and retrieve the Financial Opening Request Notification

2. Main Menu (Other Approvals → Financial opening Requests)

1) Accessing the Bid Financial Opening Request via System Notifications Functionality

Step 7.5 (d)

After accessing the system notifications, the PAC member will locate the Financial opening request and click on the 'View' button.

System Notifications (Unread)

#	Title	Time	Created	Actions
1	Financial Opening Approval	10 minutes ago	9/20/18, 10:03 AM	Mark as Read View
2	Preliminary Evaluation sent to PAC	1 week, 1 day ago	9/12/18, 3:17 PM	Mark as Read View
3	Preliminary Evaluation sent to PAC	1 week, 2 days ago	9/11/18, 10:34 AM	Mark as Read View



Notification Details



Financial Opening Approval

ken needs financial opening approval for the MAUL-HSIP/MED/18/0301/11. Check the requests.

View Details

Mark as Read

Close

Step 7.5 (e)
Click on the 'View
Details' button.



Subject: Supply of ARVs for Q4

Status: **Pending request**

Dear PAC Team,
Kindly approve Financial Bid Opening. Thank you
Bid Manager

Request from the Bid Manager.

Created: 🕒 Thursday, September 20, 2018 at 10:03 AM , Bid manager: 👤 Ken , Bid Solicitation: 📁 Supply of ARVs for Q4 , Reference number: ● MAUL-HSIP/MED/18/0301/11

✓ Approval

Step 7.5 (f)
Click on the 'Approval' button.



Financial Opening Approval for MAUL-HSIP/MED/18/0301/11

Approval	Pending
Remarks	Pending
	Approved
	Rejected

Submit Close

Step 7.5 (g)

- Click on the Approval drop down arrow and select the 'Approved' option.
- Enter relevant remarks based on the selection made above.

Step 7.5 (h)

Click on the 'Submit' button.

Approval successful, the requester has been notified.



2) Accessing the Bid Financial Opening Request via the Main Menu

Notifications

Catalogue

Requisitions

Solicitations Management

Other Approvals

- Deadline Change Requests
- Bids Opening Approval
- Suppliers Clarifications
- Preliminary Evaluations
- Technical Evaluations
- Commercial Evaluations
- Evaluations Clarifications
- Financial Opening Requests**
- Price Negotiations Requests

Bid Financial Opening Requests for Approval

Copy CSV Search:

#	Bid Solicitation	Bid Manager	Reference Number	Status	Subject	Requested Time	Approved Time	Actions
1	Supply of ARVs for Q4	Ken	MAUL-HSIP/MED/18/0301/11	Approved	Supply of ARVs for Q4	9/20/18, 10:03 AM	9/20/18, 10:16 AM	View
2	Purchase of ARVs	Ken	MAUL-HSIP/MED/17/0401/12	Approved	Purchase of ARVs	2/10/18, 11:27 AM	2/10/18, 11:29 AM	View
3	ARVs RFQ	Andrew	MAUL-PSSP/MED/17/0301/03	Approved	ARVs RFQ	11/16/17, 9:50 AM	11/16/17, 9:51	View
4	ARVs RFQ 2	Dennis	MAUL-PSSP/MED/17/0301/04	Approved	ARVs RFQ 2	10/13/17, 9:10 A		View

Showing 1 to 4 of 4 entries

1 Next

The PAC member can also access the request via the main menu. Click on the 'Other Approvals' drop down arrow and select 'Financial Opening Requests' button.

Locate the request and click on the 'View' button to access the approval window.



Financial Opening Approval for MAUL-HSIP/MED/18/0301/11

Approval	Pending
Remarks	Pending
	Approved
	Rejected

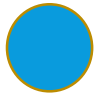
Submit Close

- Click on the Approval drop down arrow and select the 'Approved' option.
- Enter relevant remarks based on the selection made above.

Click on the 'Submit' button.

Approval successful, the requester has been notified.





Once the PAC members approve the Financial opening request, the Bid Manager will receive a **system notification** about the PAC members decision. The evaluation team will be able to progress with the Financial Bid Evaluation process.

System Notifications (Unread)

[View Read Notifications](#) [Mark all as Read](#)

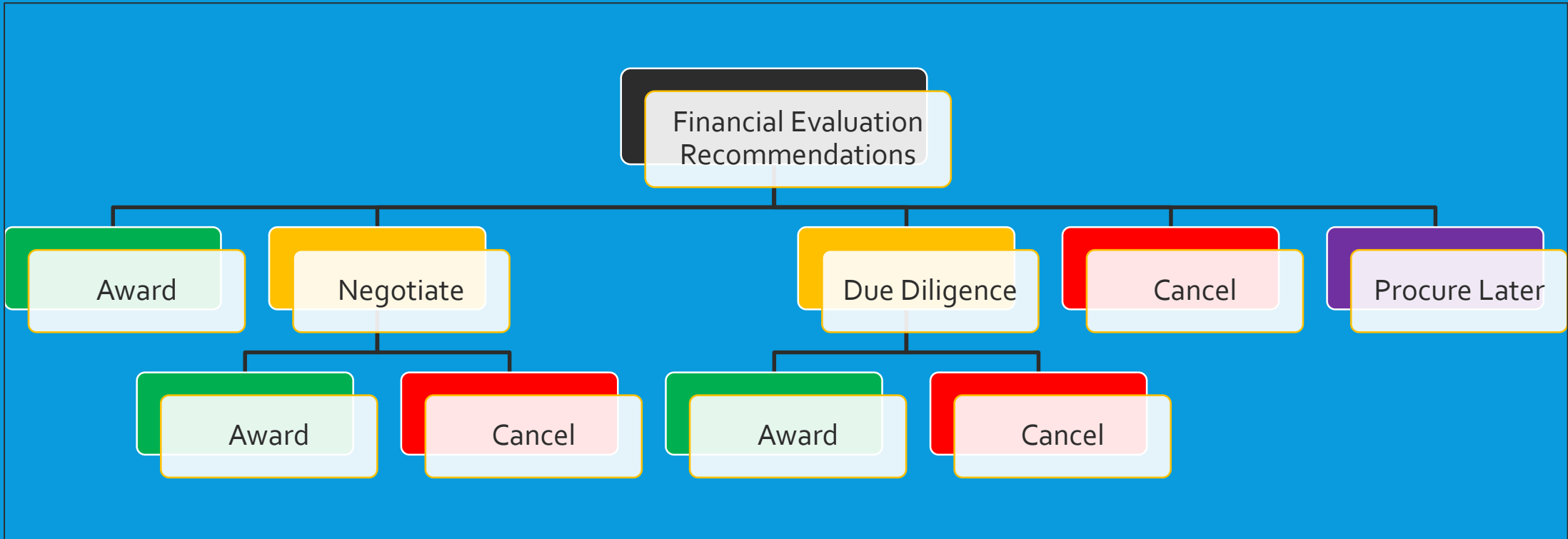
#	Title	Time	Created	Actions
1	MAUL-HSIP/MED/18/0301/11 financials opening approval	4 days ago	9/20/18, 10:16 AM	Mark as Read View
2	Preliminary Evaluation approved by PAC	1 week, 5 days ago	9/12/18, 3:21 PM	Mark as Read View
3	Preliminary Evaluation approved by PAC	1 week, 5 days ago	9/12/18, 3:17 PM	Mark as Read View

Locate the notification in the list of system notifications





The Financial Evaluation process has the following recommendations/ outcomes from the evaluation team: **Awarding, Negotiation, Conduct Due Diligence, Procure Later and Cancel Bid**. The negotiation and due diligence recommendations will go through proper procurement channels to produce final outcomes (**Award or Cancel**)





The Bid Manager will follow **Steps 7.1 (a) – 7.1 (c)** to access the 'Financial Evaluation' functionality.

Bids submitted for MAUL-HSIP/MED/18/0301/11

Public Bid Opening

Open Financial Bid

Preliminary Results

Commercial Evaluation Results

Technical Results

#	Provider Name	Address	City	Primary Contact	Primary Evaluation	Commercial Evaluation	Technical Evaluation	Financial Evaluation	Actions
1	Pascale Khayeri Mwavaga	123456	Nairobi	Blaise Pasca	passed		complete	Not done	View Bid
2	EIM Solutions	Kampala Rd	Nairobi	Cecilia Wambui	Final	passed	complete	Not done	View Bid

Step 7.5 (i)
Click the 'Open Financial Bid' button to begin the process.



Preliminary, Technical and Commercial Evaluation is Complete. Simulation complete. Open financials. ✕

Financials have been opened. ✕

Bids submitted for MAUL-HSIP/MED/18/0201/17

Preliminary Results

Commercial Evaluation Results

Technical Results

Financial Evaluation

#	Provider Name	Primary Contact	Final Submission	Preliminary Evaluation	Commercial Evaluation	Technical Evaluation	Actions
1	Pascale Mwavaga	Blaise Pascal	Final	passed	done	complete	View Bid
2	EIM Solutions	Cecilia Wambui	Final	passed	done	complete	View Bid

Step 7.5 (j)
Click the 'Financial Evaluation' button



7.5.1 Financial Evaluation Recommendation – To Award

Financial Evaluation for MAUL-HSIP/MED/18/0301/11

Financial Evaluation Ongoing

← Back to Bids

1. Atazanavir 300mg, Capsules, 30 Caps

Quantity Required: 1,000, Unit of Measure: pack [Item Evaluation](#) Evaluation Status: [Not evaluated](#)

#	Provider Name	Pack Size	Unit Price FOB	Unit Price Air EBB	Unit Price CIF Sea	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Selected to Award	Rank
1	EIM Solutions	30	16.50	17.20	16.97	18.00	3	6	No	-
2	Pascale Khayeri Mwavaga	30	15.75	16.90	16.50	17.50	5	7	No	-

2. Efavirenz 50mg, Capsules, 30 Caps

Quantity Required: 1,000, Unit of Measure: pack [Item Evaluation](#) Evaluation Status: [Not evaluated](#)

#	Provider Name	Pack Size	Unit Price FOB	Unit Price Air EBB	Unit Price CIF Sea	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Selected to Award	Rank
1	Pascale Khayeri Mwavaga	30	1.75	2.50	2.35	2.60	2	5	No	-
2	EIM Solutions	30	1.50	1.75	1.55	2.20	1	4	No	-

3. Abacavir 60mg, Tablets, 30 Tabs

Quantity Required: 1,000, Unit of Measure: Pack [Item Evaluation](#) Evaluation Status: [Not evaluated](#)

#	Provider Name	Pack Size	Unit Price FOB	Unit Price Air EBB	Unit Price CIF Sea	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Selected to Award	Rank
1	EIM Solutions	30	3.20	4.00	3.88	5.50	3	4	No	-
2	Pascale Khayeri Mwavaga	30	3.00	3.97	3.75	4.05	2	4	No	-

Step 7.5.1 (a)
Click the 'Item Evaluation' button to begin the process.



Financial Evaluation for Ab


0 Tabs Recommended Quantity is 0

Add Benchmark

Add/Change Recommended Quantity

◀ Back

 How to Evaluate Financials

 Evaluate

 Upload Files

Click the 'How to Evaluate Financials' button to access the step by step guide.

#	Attachment Name	Actions
---	-----------------	---------

Evaluation Status : Not evaluated

#	Provider Name	Quantity	Supplier Pack Size	FOB Price	Unit Price AIR EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions
1	Dummy Supplier	1,000	30	3.30	4.00	4.01	4.75	2	4	-	Rank
2	EIM Solutions	1,000	30	3.20	4.00	3.90	5.50	3	4	-	Rank
3	Pascale Mwavaga	1,000	30	3.00	3.97	3.75	4.05	2	4	-	Rank



How to Evaluate

1. Enter the quantity required to be ordered for this product. (Use Button "Add/Change Recommended Quantity")
2. Then if benchmarking is required, add a benchmark price for the product.
3. Set up different type of rankings e.g. Create Rank By DDP. Select DDP Price from the list. Then view rank. Move Bidder's up or down based on their prices.
4. Then create awards contracts to accompany the evaluation report.

Close

Note: Step No. 3 will be performed outside of the system to allow MAUL evaluation team to thoroughly execute the process according to the organization's evaluation policies and guidelines.



Financial Evaluation for Abacavir 60mg, Tablets, 30 Tabs Recommended Quantity is 0

[How to Evaluate Financials](#)

[Evaluate](#)

[Upload Files](#)

#	Attachment Name	Actions
---	-----------------	---------

Evaluation Status : Not evaluated

#	Provider Name	Quantity	Supplier Pack Size	FOB Price	Unit Price AIR EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions
1	Dummy Supplier	1,000	30	3.30	4.00	4.01	4.75	2	4	-	Rank
2	EIM Solutions	1,000	30	3.20	4.00	3.90	5.50	3	4	-	Rank
3	Pascale Mwavaga	1,000	30	3.00	3.97	3.75	4.05	2	4	-	Rank

Step 7.5.1 (b)

Click the 'Add/ Change Recommended Quantity' button to specify the quantity amounts to be ordered.

[Add/Change Recommended Quantity](#)

[Back](#)

Add/Change the Recommended Quantity To Order

The quantity required for Abacavir 60mg, Tablets, 30 Tabs has been changed successfully.

Recommended Quantity

1000

Step 7.5.1 (c)

- Enter required quantities in the 'Recommended Quantity' field provided.
- Click on the 'Save' button.

[Save](#)

[Close](#)

Financial Evaluation – Benchmarking

Financial Evaluation for Abacavir 60mg, Tablets, 30 Tabs Recommended

Add Benchmark

Add/Change Recommended Quantity

← Back

Step 7.5.1 (d)

Click on the 'Add Benchmark' button to add benchmark pricing.

[How to Evaluate Financials](#)

[Evaluate](#)

[Upload Files](#)

#	Attachment Name	Actions
---	-----------------	---------

Evaluation Status : **Not evaluated**

#	Provider Name	Quantity	Supplier Pack Size	FOB Price	Unit Price AIR EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions
1	Dummy Supplier	1,000	30	3.30	4.00	4.01	4.75	2	4	-	Rank
2	EIM Solutions	1,000	30	3.20	4.00	3.90	5.50	3	4	-	Rank
3	Pascale Mwavaga	1,000	30	3.00	3.97	3.75	4.05	2	4	-	Rank



Add Benchmark Price for Abacavir 60mg, Tablets, 30 Tabs

Benchmark With

DDP Price

Source Name

GF PPM

Benchmark Price

4.2

Source Website

<https://www.theglobalfund.org/en/sourcing-manageme>

Add

Close

Step 7.5.1 (e)

- Click the drop down arrow and select the prices for which the benchmark will apply.
- Enter the source name from where the benchmark price will be obtained from.
- Enter the benchmark price
- Enter the source website URL from where the benchmark is obtained.
- Click on the 'Add' button.

Note

Benchmarking is done per product.

procurement.spinprocure.com says

Benchmark price added successfully.

OK

Financial Evaluation for Abacavir 60mg, Tablets, 30

Add/Change Recommended Quantity

[How to Evaluate Financials](#)

Evaluation Status : Not evaluated

The benchmark prices will be added to the price schedule and a **Variance** will be calculated based on the DDP Price for which the benchmark is based on.

#	Provider Name	Recommended Quantity	BenchMark Prices		Pack Size	Unit Price FOB	Unit Price Air EBB	Unit Price CIF Sea	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions
			GF PPM	% Variances GF PPM									
1	EIM Solutions	1,000	4.20	30.95	30	3.20	4.00	3.50	5.50	3	4	-	<input type="button" value="Rank"/>
2	Pascale Khayeri Mwavaga	1,000	4.20	-3.57	30	3.00	3.97	3.75	4.05	2	4	-	<input type="button" value="Rank"/>

Benchmark prices

#	Compare with	Benchmark Source	Benchmark Source Website	Benchmark Price (USD)	Actions
1	DDP Price	GF PPM	https://www.theglobalfund.org/en/sourcing-management/price-quality-reporting/	4.20	<input type="button" value="Edit"/> <input type="button" value="Remove"/>



Financial Evaluation – Overall Ranking

Financial Evaluation for Abacavir 60mg, Tablets, 30 Tabs Recommended Quantity is 1,000

Add Benchmark

Add/Change Recommended Quantity

← Back

[How to Evaluate Financials](#)

[Evaluate](#)

[Upload Files](#)

#	Attachment Name	Actions
---	-----------------	---------

Evaluation Status : Not evaluated

#	Provider Name	Recommended Quantity	BenchMark Prices		% Variances		Supplier Pack Size	FOB Price	Unit Price AIR EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions
			GF PPM	GHSC-PSM	GF PPM	GHSC-PSM									
1	Dummy Supplier	1,000	4.20	4.18	13.10	13.64	30	3.30	4.00	4.01	4.75	2	4	-	Rank
2	EIM Solutions	1,000	4.20	4.18	30.95	31.58	30	3.20	4.00	3.90	5.50	3	4	-	Rank
3	Pascale Mwavaga	1,000	4.20	4.18	-3.57	-3.11	30	3.00	3.97	3.75	4.05	2	4	-	Rank

Step 7.5.1 (f)
Click the 'Rank' button to begin the process.

Benchmark prices

#	Compare with	Benchmark Source	Benchmark Source Website	Benchmark Price (USD)	Actions
1	DDP Price	GF PPM	https://www.theglobalfund.org/en/sourcing-management/price-quality-reporting/	4.20	Edit Remove
2	DDP Price	GHSC-PSM	https://www.ghsupplychain.org/	4.18	Edit Remove



Change Bidder Rank - Pascale Mwavaga

Rank

Change Rank

Close

Step 7.5.1 (g)

- Enter the numerical rank in the 'Rank' field provided in the format 1,2,3, ... and so on
- Click the 'Change Rank' button to save the rank.

Note

Repeat Steps 7.5.1 (f) and 7.5.1 (g) to rank other suppliers

procurement.spinprocure.com says
Rank details updated successfully.

OK



Financial Evaluation for Abacavir 60mg, Tablets, 30 Tabs Re

Add Benchmark

Add/Change Recommended Quantity

← Back

How to Evaluate Financials

Evaluate

Step 7.5.1 (h)

Click the 'Evaluate' button to choose the 'Award' Financial Evaluation recommendation.

#	Attachment Name	Actions
---	-----------------	---------

Evaluation Status : **Not evaluated**

#	Provider Name	Recommended Quantity	BenchMark Prices		% Variances		Supplier Pack Size	FOB Price	Unit Price AIR EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions
			GF PPM	GHSC-PSM	GF PPM	GHSC-PSM									
1	Pascale Mwavaga	1,000	4.20	4.18	-3.57	-3.11	30	3.00	3.97	3.75	4.05	2	4	1	Rank
2	Dummy Supplier	1,000	4.20	4.18	13.10	13.64	30	3.30	4.00	4.01	4.75	2	4	2	Rank
3	EIM Solutions	1,000	4.20	4.18	30.95	31.58	30	3.20	4.00	3.90	5.50	3	4	3	Rank

After completing Steps 7.5.1 (f) and 7.5.1 (g), the ranking will be visible as shown in the image.



Evaluation for Abacavir 60mg, Tablets, 30 Tabs

Evaluation Decision

Reason for Selection above

To Award

To Award

To Negotiate

To Due Diligence

To Procure Later

To Cancel

Submit

Close

procurement.spinprocure.com says

The evaluation status for the Abacavir 60mg, Tablets, 30 Tabs has been marked as to_award

OK

Step 7.5.1 (i)

- Click the 'Evaluation Decision' drop down arrow and select the options provided based on your evaluation outcomes.
- Enter a **relevant reason** for the outcome selected above.
- Click the 'Submit' button to complete this process.



Financial Evaluation for Abacavir 60mg, Tablets, 30 Tabs Recommended C

[Add Benchmark](#)
[Add/Change Recommended Quantity](#)
[Back](#)

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[Evaluate](#)
[Upload Files](#)

Step 7.5.1 (j)
 Click the 'Upload Files' button to upload Financial Evaluation documentation done outside the system regarding the particular item being evaluated.

#	Attachment Name	Actions
---	-----------------	---------

Evaluation Status : **To Award**


Evaluation Remarks : Suppliers have been ranked and a suitable supplier chosen for the bid

Once you have completed Step 7.4.1 (i), the evaluation status changes from 'Not Evaluated' to 'To Award'.

#	Provider Name	Recommended Quantity	G		Variances		Supplier Pack Size	FOB Price	Unit Price AIR EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions
			4.20	4.18	GHSC-PSM										
1	Pascale Mwavaga	1,000	4.20	4.18	-3.11		30	3.00	3.97	3.75	4.05	2	4	1	Rank
2	Dummy Supplier	1,000	4.20	4.18	13.10	13.64	30	3.30	4.00	4.01	4.75	2	4	2	Rank
3	EIM Solutions	1,000	4.20	4.18	30.95	31.58	30	3.20	4.00	3.90	5.50	3	4	3	Rank



7.5.2 Financial Evaluation Recommendation – **To Cancel**

-  The Bid Manager will perform the following tasks will regards to Financial Evaluation:
1. Begin the item evaluation process (**Step 7.5.1 (a)**)
 2. Add/ Change recommended quantity (**Step 7.5.1 (b) – Step 7.5.1 (c)**)
 3. Perform benchmarking (**Step 7.5.1 (d) – 7.5.1 (e)**)
 4. Perform additional evaluation tasks outside of the e-Procurement portal
 5. Rank the suppliers based on the evaluation (**Step 7.5.1 (f) – 7.5.1 (g)**)
 6. Use the '**Evaluate**' button to open the evaluation window. (**See next page**)
 7. Upload financial evaluation documentation done outside of the e-Procurement portal. (**Step 7.5.1 (i)**)
 8. Select relevant financial evaluation recommendation based on evaluation results. In this case **To Cancel**. This is a final decision, and no further evaluation tasks will be performed for the specific item.



Financial Evaluation for Atazanavir 300mg, Capsules, 30 Caps Recommended Quantity is 1,000

Add Benchmark

Add/Change Recommended Quantity

← Back

[How to Evaluate Financials](#)

Evaluate

[Upload Files](#)

Step 7.5.2 (a)

Click the 'Evaluate' button to choose the 'Cancel' Financial Evaluation recommendation.

Evaluate

Evaluate

...ed negotiating with the suppliers as all their prices are higher than the benchmark and previous purchases.

#	Provider Name	Recommended Quantity	BenchMark Prices		% Variances		Supplier Pack Size	FOB Price	Unit Price AIR EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions
			GHSC-PSM	GF PPM	GHSC-PSM	GF PPM									
1	EIM Solutions	1,000	16.00	16.50	9.38	6.06	30	15.75	16.90	16.50	17.50	5	7	1	Rank
2	Dummy Supplier	1,000	16.00	16.50	12.19	8.79	30	16.75	17.23	16.77	17.95	3	7	2	Rank
3	Pascale Mwavaga	1,000	16.00	16.50	12.50	9.09	30	16.50	17.20	16.97	18.00	3	6	3	Rank



Evaluation for Efavirenz 50mg, Capsules, 30 Caps

Evaluation Decision

Reason for Selection above

To Award
To Award
To Negotiate
To Due Diligence
To Procure Later
To Cancel

Submit

Close

procurement.spinprocure.com says

The evaluation status for the Efavirenz 50mg, Capsules, 30 Caps has been marked as to_cancel

OK

Step 7.5.2 (b)

- Click the 'Evaluation Decision' drop down arrow and select the options provided based on your evaluation outcomes.
- Enter a **relevant reason** for the outcome selected above.
- Click the 'Submit' button to complete this process.

Evaluation Status : **Cancelled**

Evaluation Remarks : We do not need this item for this financial year

#	Provider Name	Quantity	Benchmark GF P	Supplier Pack	FOB Price	Unit Price AIR EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions	
1	Pascale Mwavaga	1,000	2.25		1.75	2.50	2.35	2.60	1	4	-	Rank	
2	EIM Solutions	1,000	2.25	-2.22	30	1.50	1.75	1.55	2.20	1	4	-	Rank
3	Dummy Supplier	1,000	2.25	23.11	30	1.90	2.50	2.35	2.77	1	3	-	Rank

Once you have completed Step 7.5.2 (b), the evaluation status changes from 'Not Evaluated' to 'Cancelled'.



7.5.3 Financial Evaluation Recommendation – **To Procure Later**



The Bid Manager will perform the following tasks will regards to Financial Evaluation:

1. Begin the item evaluation process (**Step 7.5.1 (a)**)
2. Add/ Change recommended quantity (**Step 7.5.1 (b) – Step 7.5.1 (c)**)
3. Perform benchmarking (**Step 7.5.1 (d) – 7.5.1 (e)**)
4. Perform additional evaluation tasks outside of the e-Procurement portal
5. Rank the suppliers based on the evaluation (**Step 7.5.1 (f) – 7.5.1 (g)**)
6. Use the '**Evaluate**' button to open the evaluation window. (**See next page**)
7. Upload financial evaluation documentation done outside of the e-Procurement portal. (**Step 7.5.1 (i)**)
8. Select relevant financial evaluation recommendation based on evaluation results. In this case **To Procure Later**.



How to Evaluate Financials

Evaluate

Upload Files

Step 7.5.3 (a)

Click the 'Evaluate' button to choose the 'To Procure Later' Financial Evaluation recommendation.

Evaluation

Evaluation F

ter

l be procured later as it is not needed at this time

#	Provider Name	Recomended Quantity	BenchMark Prices		% Variances		Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF
			GF PPM	GHSC-PSM	GF PPM	GHSC-PSM				
1	Dummy Supplier	1,000	2.25	2.30	15.56	13.04	30	1.75	2.50	2.40
2	EIM Solutions	1,000	2.25	2.30	-2.22	-4.35	30	1.50	1.75	1.97



Evaluation for Efavirenz 50mg, Capsules, 30 Caps

Evaluation Decision

To Procure Later

Reason for Selection above

This item will be procured later as it is not needed at this time

Submit

Close

procurement.spinprocure.com says

The evaluation status for the Efavirenz 50mg, Capsules, 30 Caps has been marked as to_procure

OK

Step 7.5.3 (b)

- Click the 'Evaluation Decision' drop down arrow and select the options provided based on your evaluation outcomes.
- Enter a **relevant reason** for the outcome selected above.
- Click the 'Submit' button to complete this process.

#	Attachment Name	Actions
---	-----------------	---------

Evaluation Status : **To Procure Later**

Evaluation Remarks : This item will be procured later as it is not needed at this time

#	Provider Name	Recommended Quantity	Ber		Differences		Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions
			GF PI		GHSC-PSM										
1	Dummy Supplier	1,000	2.25		13.04		30	1.75	2.50	2.40	2.60	2	5	-	Rank
2	EIM Solutions	1,000	2.25	2.30	-2.22	-4.35	30	1.50	1.75	1.97	2.20	1	4	-	Rank
3	Tims Company	1,000	2.25	2.30	23.11	20.43	30	1.90	2.50	2.35	2.77	2	4	-	Rank

Once you have completed Step 7.5.3 (b), the evaluation status changes from 'Not Evaluated' to 'To Procure Later'.



7.5.4 Financial Evaluation Recommendation – To Due Diligence



The Bid Manager will perform the following tasks will regards to Financial Evaluation:

1. Begin the item evaluation process (**Step 7.5.1 (a)**)
2. Add/ Change recommended quantity (**Step 7.5.1 (b) – Step 7.5.1 (c)**)
3. Perform benchmarking (**Step 7.5.1 (d) – 7.5.1 (e)**)
4. Perform additional evaluation tasks outside of the e-Procurement portal
5. Rank the suppliers based on the evaluation (**Step 7.5.1 (f) – 7.5.1 (g)**)
6. Use the '**Evaluate**' button to open the evaluation window. (**See next page**)
7. Upload financial evaluation documentation done outside of the e-Procurement portal. (**Step 7.5.1 (i)**)
8. Select relevant financial evaluation recommendation based on evaluation results. In this case **To Due Diligence.**



Financial Evaluation for Atazanavir 300mg, Capsules, 30 Caps Recommended Quantity is 1,000

Add Benchmark

Add/Change Recommended Quantity

← Back

How to Evaluate Financials

Evaluate

Upload Files

Step 7.5.4 (a)

Click the 'Evaluate' button to choose the 'Negotiate' Financial Evaluation recommendation.

Evaluate

Evaluate

Recommended negotiating with the suppliers as all their prices are higher than the benchmark and previous purchases.

#	Provider Name	Recommended Quantity	BenchMark Prices		% Variances		Supplier Pack Size	FOB Price	Unit Price AIR EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions
			GHSC-PSM	GF PPM	GHSC-PSM	GF PPM									
1	EIM Solutions	1,000	16.00	16.50	9.38	6.06	30	15.75	16.90	16.50	17.50	5	7	1	Rank
2	Dummy Supplier	1,000	16.00	16.50	12.19	8.79	30	16.75	17.23	16.77	17.95	3	7	2	Rank
3	Pascale Mwavaga	1,000	16.00	16.50	12.50	9.09	30	16.50	17.20	16.97	18.00	3	6	3	Rank



Evaluation for Atazanavir 300mg, Capsules, 30 Caps

Evaluation Decision

Reason for Selection above

To Due Diligence

To Award

To Negotiate

To Due Diligence

To Procure Later

To Cancel

Submit

Close

procurement.spinprocure.com says

The evaluation status for the Atazanavir 300mg, Capsules, 30 Caps has been marked as to_due_diligence

OK

Step 7.5.4 (b)

- Click the 'Evaluation Decision' drop down arrow and select the options provided based on your evaluation outcomes.
- Enter a **relevant reason** for the outcome selected above.
- Click the 'Submit' button to complete this process.



Financial Evaluation for Atazanavir 300mg, Capsules, 30 Caps Recommended Quantity is 1,000

[Add Benchmark](#)
[Add/Change Recommended Quantity](#)
[Back](#)

[How to Evaluate Financials](#)
[Evaluate](#)
[Upload Files](#)

#	Attachment Name	Actions
---	-----------------	---------

Evaluation Status : **To Due Diligence**

Evaluation Remarks :

Once you have completed Step 7-5-5 (b), the evaluation status changes from 'Not Evaluated' to 'To Due Diligence'.
Note
 Other processes will be executed so that this status changes to either Cancel or Award

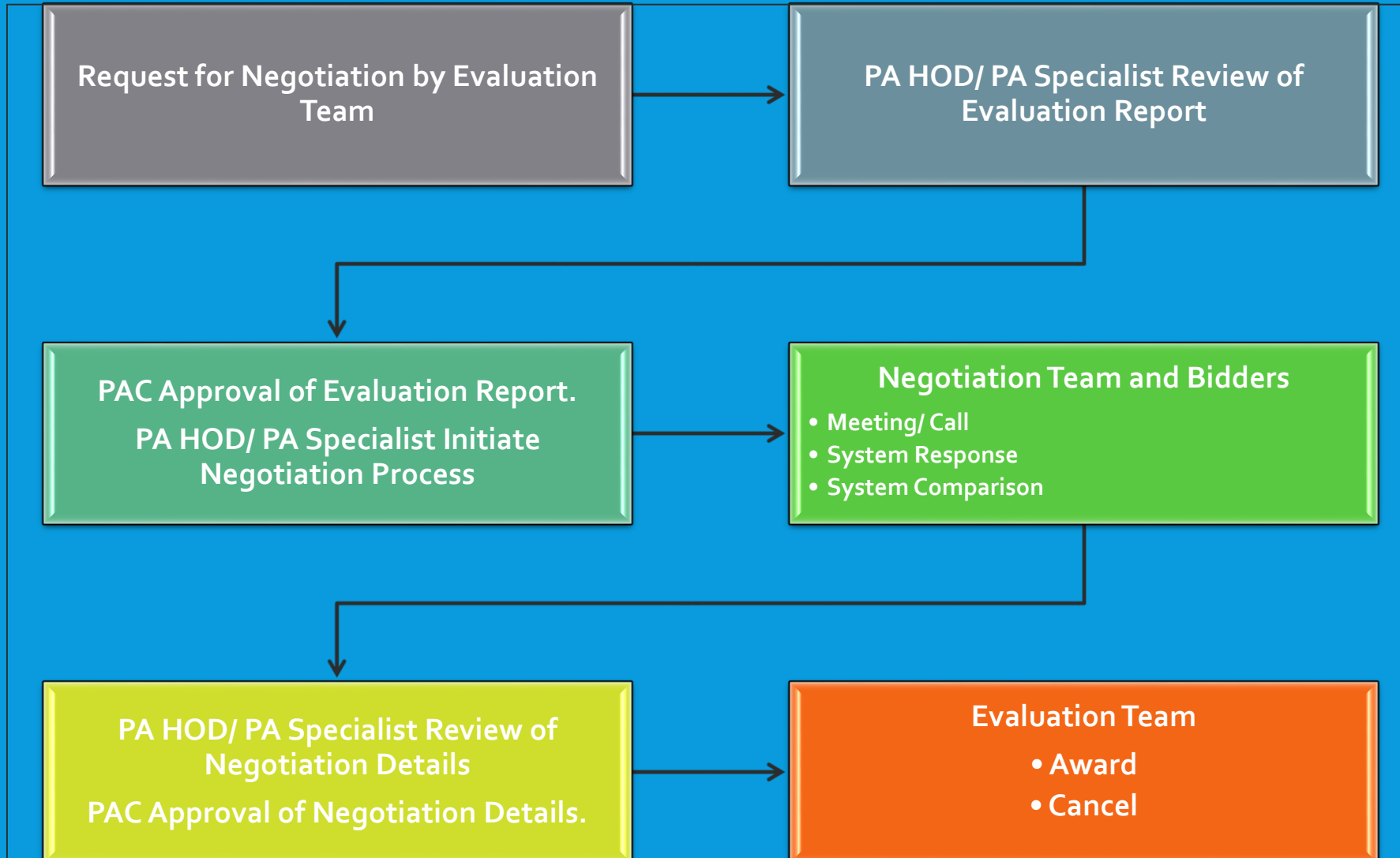
#	Provider Name	Recommended Quantity	Benchmark Prices	% Variances	Supplier Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions
1	Dummy Supplier	1,000				15.75	16.90	16.50	17.50	5	7	1	Rank
2	Tims Company	1,000				16.75	17.23	16.77	17.95	3	7	2	Rank
3	EIM Solutions	1,000				16.50	17.20	16.97	18.00	3	6	3	Rank

Benchmark prices

#	Compare with	Benchmark Source	Benchmark Source Website	Benchmark Price (USD)	Actions
1	DDP Price	GF PPM	https://www.globalfund.org	17.00	Edit Remove



7.5.5 Financial Evaluation Recommendation – **To Negotiate**





The Bid Manager will perform the following tasks will regards to Financial Evaluation:

1. Begin the item evaluation process (**Step 7.5.1 (a)**)
2. Add/ Change recommended quantity (**Step 7.5.1 (b) – Step 7.5.1 (c)**)
3. Perform benchmarking (**Step 7.5.1 (d) – 7.5.1 (e)**)
4. Perform additional evaluation tasks outside of the e-Procurement portal
5. Rank the suppliers based on the evaluation (**Step 7.5.1 (f) – 7.5.1 (g)**)
6. Use the '**Evaluate**' button to open the evaluation window. (**See next page**)
7. Upload financial evaluation documentation done outside of the e-Procurement portal. (**Step 7.5.1 (i)**)
8. Select relevant financial evaluation recommendation based on evaluation results. In this case **To Negotiate**.



Financial Evaluation for Atazanavir 300mg, Capsules, 30 Caps Recommended Quantity is 1,000

Add Benchmark

Add/Change Recommended Quantity

← Back

How to Evaluate Financials

Evaluate

Upload Files

Step 7.5.5 (a)

Click the 'Evaluate' button to choose the 'Negotiate' Financial Evaluation recommendation.

Evaluate

Evaluate

...ed negotiating with the suppliers as all their prices are higher than the benchmark and previous purchases.

#	Provider Name	Recommended Quantity	BenchMark Prices		% Variances		Supplier Pack Size	FOB Price	Unit Price AIR EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions
			GHSC-PSM	GF PPM	GHSC-PSM	GF PPM									
1	EIM Solutions	1,000	16.00	16.50	9.38	6.06	30	15.75	16.90	16.50	17.50	5	7	1	Rank
2	Dummy Supplier	1,000	16.00	16.50	12.19	8.79	30	16.75	17.23	16.77	17.95	3	7	2	Rank
3	Pascale Mwavaga	1,000	16.00	16.50	12.50	9.09	30	16.50	17.20	16.97	18.00	3	6	3	Rank



Evaluation for Atazanavir 300mg, Capsules, 30 Caps

Evaluation Decision

Reason for Selection above

To Award
To Award
To Negotiate
To Due Diligence
To Procure Later
To Cancel

Submit

procurement.spinprocure.com says
The evaluation status for the Atazanavir 300mg, Capsules, 30 Caps has been marked as to_negotiate

Close

OK

Step 7.5.5 (b)

- Click the 'Evaluation Decision' drop down arrow and select the options provided based on your evaluation outcomes.
- Enter a **relevant reason** for the outcome selected above.
- Click the '**Submit**' button to complete this process.



Financial Evaluation for Atazanavir 300mg, Capsules, 30 Caps Recommended Quantity is 1,000

Add Benchmark

Add/Change Recommended Quantity

← Back

[How to Evaluate Financials](#)

[Evaluate](#)

[Upload Files](#)

Use the 'Back' button to access the evaluation report.
Note
 The evaluation Report functionality is visible when ALL items have been evaluated.

#	Attachment Name	Actions
---	-----------------	---------

Evaluation Status : **To Negotiate**

Evaluation Remarks : We recommend negotiating with the suppliers as all their prices are higher than the benchmark and previous purchases.

Once you have completed Step 7.5.5 (b), the evaluation status changes from 'Not Evaluated' to 'To Negotiate'.
Note
 Other processes will be executed so that this status changes to either Cancel or Award

#	Provider Name	Recommended Quantity	Variances		Supplier Pack Size	FOB Price	Unit Price AIR EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions
			M	GF PPM									
1	EIM Solutions	1,000		6.06	30	15.75	16.90	16.50	17.50	5	7	1	Rank
2	Dummy Supplier	1,000		8.79	30	16.75	17.23	16.77	17.95	3	7	2	Rank
3	Pascale Mwavaga	1,000		9.09	30	16.50	17.20	16.97	18.00	3	6	3	Rank



Viewing Evaluation Report

Financial Evaluation for MAUL-HSIP/MED/19/0201/04

Financial Evaluation Ongoing

[View Evaluation Report](#)

[← Back to Bids](#)

1. Efavirenz 50mg, Capsules, 30 Caps

Quantity Required: 1,000, Unit of Measure: pack [Item Evaluation](#) Evaluation Status: [To Award](#)

#	Provider Name	Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time	Selected to Award	Rank
1	Dummy Supplier	30	1.75	2.50	2.35	2.60	2		2
2	Tims Company	30	1.90	2.50	2.35	2.77	1		3
3	EIM Solutions	30	1.50	1.75	1.55	2.20	1		1

Step 7-5.5 (c)
Click the 'View Evaluation Report' button to view the report before submitting to PA HOD/ PA Specialist.

2. Abacavir 60mg, Tablets, 30 Tabs

Quantity Required: 1,000, Unit of Measure: Pack [Item Evaluation](#) Evaluation Status: [To Award](#)

#	Provider Name	Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Selected to Award	Rank
1	Tims Company	30	3.30	4.00	4.01	4.75	2	4	No	2
2	EIM Solutions	30	3.20	4.00	3.90	5.50	3	4	No	3
3	Dummy Supplier	30	3.00	3.97	3.75	4.05	2	4	No	1

3. Atazanavir 300mg, Capsules, 30 Caps

Quantity Required: 1,000, Unit of Measure: pack [Item Evaluation](#) Evaluation Status: [To Due Diligence](#)

#	Provider Name	Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Selected to Award	Rank
1	Dummy Supplier	30	15.75	16.90	16.50	17.50	5	7	No	1
2	Tims Company	30	16.75	17.23	16.77	17.95	3	7	No	2



Post Evaluation Activities

- Suppliers Due Diligence [Due Diligence Settings](#)
- Propose Contract Manager [Click here](#)

List of requirements

[Click here](#)

Procurement Process

[Click here](#)

Quotations Opening

[Click here](#)

Evaluation Team

[Click here](#)

Preliminary Evaluation

[Click here](#)

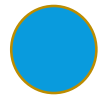
Technical Compliance Evaluation

[Click here](#)

The evaluation report contains all the results of the evaluation stages (Preliminary, Commercial, Technical, and Financial). The report also contains **Post Evaluation Activities** which must be done for **Negotiation** and **Due Diligence evaluation status**. These activities will be explained in detail in the next sections.



7.6 Financial Evaluation – Negotiation Settings



If the financial evaluation status of a particular item has been set to **Negotiate**, additional settings must be configured so that they can be used in the negotiation process. The negotiation process enables MAUL's Procurement Agency in getting favorable terms and prices from bidders. This section will deal with the following configurations:

- Propose Contract Manager
- Price Negotiation Settings

The additional negotiation settings will be done as part of post evaluation activities. The evaluation report contains functionalities that will enable creation of these configurations. The negotiation settings must be completed before the evaluation report is sent for review and approval.



7.6.1 Propose Contract Manager

MAUL-HSIP/MED/18/0201/17 - Evaluation Report

← Back

Submit to PA

Remarks

Post Evaluation Activities

- Price Negotiations [Negotiations Settings](#)
- Propose Contract Manager [Click here](#)

List of requirements

[Click here](#)

Procurement Process

[Click here](#)

Step 7.6.1 (a)

Click the 'Click Here' button.



Propose Contract Manager

Contract manager Procurement Specialist

Description

Propose

Close

Step 7.6.1 (b)

- Click on the drop down arrow and select a **Contract Manager**
- Enter relevant remarks on the **Description** field provided.
- Click on the **Propose** button to complete the process.



7.6.2 Price Negotiation Settings

MAUL-HSIP/MED/19/0301/06 - Evaluation Report

Post Evaluation Activities

- Price Negotiations [Negotiations Settings](#)
- Suppliers Due Diligence [Due Diligence Settings](#)
- Contract Manager: Procurement Specialist [Change](#)

Step 7.6.2 (a)

Click the
**Negotiation
Settings** button.



Price Negotiation Settings



Select Negotiation Items

Select Negotiation Team

Select Fields

Add/ Update Negotiation Details

Step 7.6.2 (b)

Click the Select Fields Tab.

The products to Negotiate Prices. Add/Edit Target Prices.

Item Name	Selected	Actions
Atazanavir 300mg, Capsules, 30 Caps	Yes	Add Target Prices

Close



Price Negotiation Settings



Select Negotiation Items

Select Negotiation Team

Select Fields

Add/ Update Negotiation Details

Select fields sent to suppliers.

Search Fields

Search for field names..

Field Name	Selected	Actions
Supplier Pack Size	No	Select
FOB Price	No	Select
Unit Price Air EBB	No	Select
Unit Price CIF	No	Select
DDP Price	No	Select
Lead Time Air Weeks	No	Select
Lead Time Sea Weeks	No	Select

Step 7.6.2 (c)

Click the **Select** button.

procurement.spinprocure.com says
Field added to the template successfully.

OK

Step 7.6.2 (d)

Click the **OK** button.

Close

Price Negotiation Settings



- Select Negotiation Items
- Select Negotiation Team
- Select Fields
- Add/ Update Negotiation Details

Select fields sent to suppliers.

Search Fields

Step 7.6.2 (e)
Repeat Step 7.6.2 (b) – (d)
to select additional fields.

Field Name	Selected	Actions
Supplier Pack Size	No	Select
FOB Price	Yes	Select
Unit Price Air EBB	Yes	Select
Unit Price CIF	Yes	Select
DDP Price	Yes	Select
Lead Time Air Weeks	Yes	Select
Lead Time Sea Weeks	Yes	Select

Close



Step 7.6.2 (f)
Click on the **Select Negotiation Items** Tab.

Price Negotiation Settings



Select Negotiation Items

Select Negotiation Team

Select Fields

Add/ Update Negotiation Details

The products to Negotiate Prices. Add/Edit Target Prices.

Item Name	Selected	Actions
Atazanavir 300mg, Capsules, 30 Caps	Yes	Add Target Prices

Step 7.6.2 (g)
Click on the **Add Target Prices** button.

Close



Add Target Price



Item : Atazanavir 300mg, Capsules, 30 Caps. 

Lower Limit Qty Percentage 20

FOB Price 15.70

Unit Price Air EBB 16.00

Unit Price CIF 15.97

DDP Price 16.50

Lead Time Air Weeks 3

Lead Time Sea Weeks 6

Add 

Step 7.6.2 (h)

- Enter the details in the fields provided.

Note

These fields appear as defined in Step 7.6.2 (c) – (e)

- Click the **Add** button to complete the process.

procurement.spinprocure.com says

The target prices have been added successfully.

OK

Close

Price Negotiation Settings



Select Negotiation Items

Select Negotiation Team

Select Negotiation Details

Step 7.6.2 (i)
Click on the **Select Negotiation Team** Tab.

Select Negotiators from the System Users

Search Names

Search for names..

Name	Selected	Actions
System admin	No	Select
Procurement Specialist	No	Select
Rowland Simiyu	No	Select
Ken Shabola	No	Select
Andrew Muhenda	No	Select
Dennis Kibunja	No	Select
Emma Emma	No	Select
John Doe	No	Select
Paul Ng'ang'a	No	Select
Tim Mbogo	No	Select

Step 7.6.2 (j)
Click on the **Select** button.

procurement.spinprocure.com says
Negotiator added to the team successfully

OK

Price Negotiation Settings



Select Negotiation Items

Select Negotiation Team

Select Fields

Add/ Update Negotiation Details

Preview Ne

Step 7.6.2 (k)
Click on the Add/ Update Tab.

Subject

Recommendation for Negotiation of Atazanavir 300mg, Capsules, 30 Tabs

Message to PA

Dear Procurement Agency,
Please find the Evaluation Report from the Evaluation team. We recommend further negotiation with bidders concerning Atazanavir 300mg, Capsules, 30 Tabs

Attachment (Optional)

Choose file No file chosen

Step 7.6.2 (l)
Enter the relevant information in the Subject, Message, and Attachment fields provided.

Add


Step 7.6.2 (m)
Click on the Add button.

procurement.spinprocure.com says
Negotiation details added successfully.

OK

Close

7.7 Financial Evaluation – Due Diligence Settings

 If the financial evaluation status of a particular item has been set to **Due Diligence**, additional settings must be configured so that they can be used in the due diligence process. Due diligence in procurement pertains verification of a supplier's capability to deliver goods or services in order to mitigate procurement risks .

The additional due diligence settings will be done as part of post evaluation activities. The evaluation report contains functionalities that will enable creation of these configurations. The due diligence settings must be completed before the evaluation report is sent for review and approval.

Due diligence configurations will include: Proposal of Contract Manager (**explained in section 7.6.1 (a) – (b)**) and Due diligence settings.



Due Diligence Settings

MAUL-HSIP/MED/19/0301/06 - Evaluation Report

Post Evaluation Activities

- Price Negotiations [Negotiations Settings](#)
- Suppliers Due Diligence [Due Diligence Settings](#)
- Contract Manager: Procurement Specialist [Change](#)

Step 7.7 (a)
Click the **Due Diligence Settings** button.

List of requirements



Suppliers Due Diligence Settings

Suppliers Due Diligence

Step 7.7 (b)

Click on the **Due Diligence Details** Tab.

Due Diligence Details

Team / Panel

Suppliers

Questions

New Due Diligence Settings for MAUL-HSIP/MED/19/0301/06

Criteria

Verify Financial Information

About Criteria

This process will ascertain whether the suppliers' business is financially sound.

Add

procurement.spinprocure.com says

Due diligence settings has been added successfully.

OK

Close

Step 7.7 (c)

- Enter the **Criteria** information in the field provided.
- Enter a brief **Description** of the criteria.
- Click on the **Add** button to complete the process.

Suppliers Due Diligence Settings

Due Diligence Details

Team / Panel

Step 7.7 (d)

Click on the **Team/ Panel** Tab.

Team Conducting Due Diligence

Search Names

Name	Selected	Actions
System admin	No	Select
Procurement Specialist	No	Select
Rowland Simiyu	No	Select
Ken Shabola	No	Select
Andrew Muhenda	No	Select
Dennis Kibunja	No	Select
Emma Emma	No	Select
John Doe	No	Select
Paul Ng'ang'a	No	Select

Step 7.7 (e)

Click on the **Select** button.

procurement.spinprocure.com says
Evaluator added successfully.

OK

Suppliers Due Diligence Settings



Suppliers Due Diligence Settings

Due Diligence Details

Team / Panel

Suppliers

Questions

Step 7.7 (f)

Click on the **Questions** Tab.

Propose Questions

Question Text

Does the bidder/ supplier have audited financial statements (cash flow, balance sheet, income statement) for the last three years, including an auditor's report?



Add

Step 7.7 (g)

- Enter the due diligence question on the field provided.
- Click on the **Add** button.

Question added to the Questionnaire - Expected Response [YES]/[NO]

#

procurement.spinprocure.com says

Action

Question has been added to the questionnaire successfully.

OK

Close

Suppliers Due Diligence Settings

Due Diligence Details

Team / Panel

Suppliers

Questions

Propose Questions

Question Text

Does the bidder/ supplier have a schedule of accounts receivable and accounts payable?

Add

Questions added to the Questionnaire - Expected Response [YES]/[NO]

#	Question	Action
1	Does the bidder/ supplier have audited financial statements (cash flow, balance sheet, income statement) for the last three years, including an auditor's report?	<p>Edit</p> <p>Remove</p>
2	Does the bidder/ supplier have a schedule of accounts receivable and accounts payable?	<p>Edit</p> <p>Remove</p>

Step 7.7 (h)

Repeat Step 7.7 (f) – (g) to define additional questions.

Close



Sending Evaluation Report for Review

MAUL-HSIP/MED/19/0301/06 - Evaluation Report

[← Back](#)[Submit to PA](#)[Remarks](#)

Post Evaluation Activities

- Price Negotiations [Negotiations Settings](#)
- Suppliers Due Diligence [Due Diligence Settings](#)
- Contract Manager:Procurement Specialist [Change](#)

List of requirements

[Click here](#)

Procurement Process

[Click here](#)

Step 7.7 (i)

Once ALL the relevant post evaluation settings have been defined, the Bid Manager will be able to send the evaluation report to the Procurement Specialist/ HOD for review. After review the report will be submitted to PAC for approval.



Submit Evaluation Report to Procurement Authority

Subject Evaluation Report Review

Message Dear Procurement HOD/ Specialist,
|
Kindly review the evaluation Report.

Evaluation Team.

Attachment (Optional) Choose file No file chosen

Submit

procurement.spinprocure.com says
Evaluation Report submitted to PA successfully.

Close

OK

Step 7.7 (j)

- Enter the **Subject**
- Enter the **Message** to PA HOD/ Specialist
- Upload relevant **Attachment** to accompany the evaluation report.
- Click on **Submit** button.



7.8 Review & Approval of Evaluation Report

EVALUATION REPORT

1. *Contract Manager*
2. *Negotiation Settings*
3. *List of requirements*
4. *Procurement Process*
5. *Quotations Opening*
6. *Evaluation Team*
7. *Preliminary Evaluation*
8. *Technical Compliance Evaluation*
9. *Commercial Evaluation*
10. *Financial Evaluation*
11. *Price Benchmarking*

REVIEW PENDING

After performing all relevant evaluation tasks as described in **sections 7.1 – 7.7**, the Bid Manager will submit the **Overall Evaluation Report** to the Procurement Agency HOD and PA Specialist for review. When an item's Financial evaluation status is set to **'To Negotiate'** or **'To Conduct Due Diligence'**, a sequence of tasks must be undertaken to make sure the final outcome is either **'Award or Cancel'**. The PA HOD/ Specialist will be required to review the reasons for negotiation/ Due Diligence before submitting the evaluation report to PAC team.

The PA HOD and PA Specialist will be notified on the evaluation report submission via E-mail and the e-Procurement system notifications.

PA HOD/ PA Specialist Review of Evaluation Report

The Evaluation report submission notification will be displayed in the list of notifications.

Step 7.8 (a)
The PA HOD/ PA Specialist will be required to log in to the portal and access system notifications functionality. Click 'See All Alerts'

Step 7.8 (b)
Click the 'View' button.

System Notifications

#	Title	Time	Created	Actions
1	MAUL-HSIP/MED/02/0101/15 Evaluation Report.	18 hours, 51 minutes ago	10/8/18, 3:36 PM	Mark as Read View
2	RFx MAUL-HSIP/MED/02/0101/15 sent to suppliers.	1 week, 1 day ago	10/1/18, 4:05 PM	View
3	RFx MAUL-HSIP/MED/02/0101/15 approved by PAC	1 week, 1 day ago	10/1/18, 3:59 PM	View
4	RFx MAUL-HSIP/MED/02/0101/15 prepared	1 week, 1 day ago	10/1/18, 1:00 PM	Mark as Read View

119 Emma Emma ▾

See All Alerts > all as Read

You can also access the evaluation report by following this path: **Solicitations Management (Main Menu) → All Bid Solicitations → Evaluation Report**



Notification Details



MAUL-HSIP/MED/02/0101/15 Evaluation Report.

The MAUL-HSIP/MED/02/0101/15 Evaluation Report has been submitted by the bid manager for review.

[View Evaluation Report](#)

[Mark as Read](#)

Step 7.8 (c)

Click the 'View Evaluation Report' button.

Close



- ☰ Requisitions ▾
- ☰ Solicitations Management ▾
- 📣 Other Approvals ▾
- ✓ Evaluations ▾
- 🔍 Awards ▾
- 📄 Contract Management ▾
- 📊 Reports ▾

List of requirements

[Click here](#)

Procurement Process

[Click here](#)

Quotations Opening

[Click here](#)

Evaluation Team

[Click here](#)

Preliminary Evaluation

[Click here](#)

Technical Compliance

[Click here](#)

Commercial Evaluation

[Click here](#)

Financial Evaluation

[Click here](#)

Price Benchmarking

[Click here](#)

Contents of the **Evaluation Report**.
Use the '**Click Here**' button to expand the fields to view additional details.



MAUL-HSIP/MED/19/0301/06 - Evaluation Report

← Back

Approval Details

Review Evaluation Report

Remarks

Contract Manager: Procurement Specialist

Price Negotiation [Details](#)

Due Diligence: [Details](#)

List of requirements

[Click here](#)

Procurement Process

Click the **Details** button to view Negotiation settings.



Preview negotiation details and settings



Negotiation Team

Name

Procurement Specialist

Products that requires price negotiation with target prices

#	Item Name	Lower Limit Qty	Upper Limit Qty	DDP Price	Lead Time Sea Weeks	Lead Time Air Weeks	FOB Price	Unit Price Air EBB	Unit Price CIF
1	Atazanavir 300mg, Capsules, 30 Caps	200	1,000	16.80	6	3	15.70	16.00	15.97

Message to Procurement Agency (PA)

Dear Procurement Agency,
Please find the Evaluation Report from the Evaluation team. We recommend further negotiation with bidders concerning Atazanavir 300mg, Capsules, 30 Tabs
Evaluation Team

Close



MAUL-HSIP/MED/19/0301/06 - Evaluation Report

← Back

Approval Details

Review Evaluation Report

Remarks

Contract Manager: Procurement Specialist

Price Negotiation: [Details](#)

Due Diligence: [Details](#)

Click the **Details** button to view Due Diligence settings.

List of requirements

[Click here](#)

Procurement Process



Due Diligence Details



Criteria : Verify Financial Information

Suppliers that require due diligence

#	Provider Name
1	EIM Solutions
2	Dummy Supplier

Team conducting Due Diligence

#	Name
1	Procurement Specialist

Due Diligence Questionnaire - Expected Response [YES]/[NO]

#	Question
1	Does the bidder/ supplier have audited financial statements (cash flow, balance sheet, income statement) for the last three years, including an auditor's report?
2	Does the bidder/ supplier have a schedule of accounts receivable and accounts payable?

Details

This process will ascertain whether the suppliers' business is financially sound.



☰ Help All times in East African Time (EAT) 119 Emma Emma ▾

MAUL-HSIP/MED/02/0101/15 - Evaluation Report

Contract Manager: Procurement Specialist

List of requirements

Click here

Procurement Process

Click here

Quotations Opening

◀ Back Approval Details Review Evaluation Report Remarks

The Approval details window shows the status of the evaluation report review and approval.

Click the 'Remarks' button to view bid Evaluation team's remarks.

☰ Help All times in East African Time (EAT) 119 Emma Emma ▾

MAUL-HSIP/MED/02/0101/15 - Evaluation Report

◀ Back Review Evaluation Report Remarks

Evaluation Report Approval

PA Review : Pending Review

Contract Manager: Procurement Specialist

List of requirements

Click here

Procurement Process



MAUL-HSIP/MED/02/0101/15 - Evaluation Report

← Back

Review Evaluation Report

Remarks

Evaluation Report Approval

PA Review : Pending Review

Contract Manager: Procurement Specialist

List of requirements

Click here

Procurement Process

Step 7.8 (d)

Once the PA HOD/ PA Specialist has reviewed the contents of the Evaluation report, the review can be completed by clicking on the 'Review Evaluation Report' button.



Review Evaluation Report

Review Action	Submit to PAC
Subject	Evaluation Report
Remarks	Dear PAC, The evaluation Report is in order. kindly approve. PA Specialist

Submit

Close

procurement.spinprocure.com says
Evaluation Report reviewed and submitted to PAC successfully.

OK

Step 7.8 (e)

- Click the drop down arrow and select review options provided (**Submit to PAC or Request Changes from Bid Manager**)
- Enter the subject matter in the **Subject** field provided.
- Enter relevant **Remarks** based on your review action.
- Click the '**Submit**' button to complete the process.



PAC Approval/ Rejection of Evaluation Report

Step 7.8 (f)

A PAC member will be required to log in to the portal and access system notifications functionality. Click 'See All Alerts'

The screenshot shows the e-Procurement interface. On the left is a dark sidebar with navigation items: e-Procurement, Notifications, System Notifications, Catalogue, Requisitions, and Solicitations Management. The main content area is titled 'System Notifications (Unread)'. At the top right of this area is a 'See All Alerts >' button, highlighted with a yellow box. Below this is a table with columns: #, Title, Time, Created, and Actions. The first row of the table has a 'View' button in the Actions column, also highlighted with a yellow box. A yellow callout box points to the 'See All Alerts >' button with the text 'Step 7.8 (f) A PAC member will be required to log in to the portal and access system notifications functionality. Click 'See All Alerts''. Another yellow callout box points to the 'View' button with the text 'Step 7.8 (g) Click the 'View' button.' The top right of the page shows a user profile for 'Rowland Simiyu' and a notification badge with the number '31'.

#	Title	Time	Created	Actions
1	MAUL-HSIP/MED/02/0101/15 Evaluation Report.	1 day, 18 hours ago	10/9/18, 4:26 PM	Mark as Read View
2	RFx MAUL-HSIP/SUP/18/0103/16 approved	1 day, 19 hours ago	10/9/18, 3:36 PM	Mark as Read View
3	Financial Opening Approval	1 week, 1 day ago	10/3/18, 11:21 AM	Mark as Read View

Step 7.8 (g)

Click the 'View' button.

You can also access the evaluation report by following this path: **Solicitations Management (main Menu) → All Bid Solicitations → Evaluation Report**



Notification Details



MAUL-HSIP/MED/02/0101/15 Evaluation Report.

The MAUL-HSIP/MED/02/0101/15 Evaluation Report has been submitted by the Procurement Authority for approval.

[View Evaluation Report](#)

[Mark as Read](#)

Step 7.8 (h)

Click the 'View Evaluation Report' button.

Close



- Requisitions
- Solicitations Management
- Other Approvals
- Evaluations
- Awards
- Contract Management
- Reports

List of requirements

[Click here](#)

Procurement Process

[Click here](#)

Quotations Opening

[Click here](#)

Evaluation Team

[Click here](#)

Preliminary Evaluation

[Click here](#)

Technical Compliance

[Click here](#)

Commercial Evaluation

[Click here](#)

Financial Evaluation

[Click here](#)

Price Benchmarking

[Click here](#)

Contents of the **Evaluation Report**.
Use the '**Click Here**' button to expand the fields to view additional details.



MAUL-HSIP/MED/18/0101/01 - Evaluation Report

[← Back](#) [Evaluation Report Approval](#) [Approval Details](#) [Remarks](#)

Contract Manager: Procurement Specialist

Price Negotiation: [Details](#)

List of requirements

[Click here](#)

Procurement Process

The Approval details window shows the status of the evaluation report review and approval.

Click the **'Remarks'** button to view Evaluation Team and PA HOD's remarks.

MAUL-HSIP/MED/02/0101/15 - Evaluation Report

[← Back](#) [Evaluation Report Approval](#) [Remarks](#)

Evaluation Report Approval

PA Review : [reviewed](#)

PAC Approval : [Pending Approval](#)

Contract Manager: Procurement Specialist





MAUL-HSIP/MED/02/0101/15 - Evaluation Report

[← Back](#) [Evaluation Report Approval](#) [Approval Details](#) [Remarks](#)

Contract Manager: Procurement Specialist

List of requirements

[Click here](#)

Procurement Process

[Click here](#)

Step 7.8 (i)

Once the PAC Team has reviewed the contents of the Evaluation report, the review can be completed by clicking on the 'Evaluation Review Approval' button.



PAC Approval/ Rejection of Evaluation Report - **Contract Manager**

Step 7.8 (j)
Click on the 'Contract Manager Approval' tab.

MAUL-HSIP/MED/02/0101/15 - Evaluation Report

← Back Evaluation Report Approval Approval Details Remarks

Step 1 : Contract Manager Approval Step 2 : Negotiations Approval Step 3 : Due Diligence Approval Step 4 : Evaluation Report Approval

Contract Manager: Procurement Specialist Contract Manager Approval

Step 7.8 (k)
Click on the 'Contract Manager Approval' button.

Contract Manager

Help All times in East African Time (EAT) 31 Rowland Simiyu



Contract Manager Approval

Select action: Approve Contract Manager

Remarks: The Contract Manager has been approved.

Submit

Close

Step 7.8 (I)

- Click on the select action drop down arrow and select the options provided. (**Approve Contract Manager or Request Contract Manager Change**)
- Give a brief explanation for the selection above.
- Click the 'Submit' button to complete the process.

procurement.spinprocure.com says
Approval process successful.

OK

MAUL-HSIP/MED/02/0101/15 - Evaluation Report

Contract Manager: Procurement Specialist **approved** - by PAC [Details](#)

PAC Approval/ Rejection of Evaluation Report – **Negotiations Approval**

MAUL-HSIP/MED/19/0301/06 - Evaluation Report

← Back Evaluation Report Approval Approval Details Remarks

Contract Manager Approval **Negotiations Approval** Price Negotiation Evaluation Report Approval

Price Negotiation **Details and Approval**

Step 7.8(m)
Repeat **Step 7.8 (i)**
and click on the
**'Negotiations
Approval'** tab.

Step 7.8 (n)
Click on the **'Details
and Approval'** button.



Preview negotiation details and settings



Negotiation Team

Negotiation Details Approval

Name
Procurement Specialist
Ken Shabola

Step 7.8 (o)
 Click on the 'Negotiation Details Approval' button.

Products that requires price negotiation with target prices

#	Item Name	Lower Limit Qty	Upper Limit Qty	Unit Price Air EBB	Lead Time Sea Weeks	Lead Time Air Weeks	DDP Price	Pack Size	FOB Price	Unit Price CIF
1	Atazanavir 300mg, Capsules, 30 Caps	180	900	16.00	6	3	17.00	30	15.70	15.97

Close



Negotiation Details Approve

Approval Action	Approve
Remarks	Negotiation details have been approved

Submit

procurement.spinprocure.com says
Negotiation has been approved successfully

Close

OK

Step 7.8 (p)

- Click on the approval action drop down arrow and select the options provided. (**Approve or Reject**)
- Give a brief explanation for the selection above on the **remarks** field.
- Click the '**Submit**' button to complete the process.



Preview negotiation details and settings



PAC approval status: **approved**

Negotiation Team

Name
Procurement Specialist
Ken Shabola

Products that requires price negotiation with target prices

#	Item Name	Lower Limit Qty	Upper Limit Qty	Unit Price Air EBB	Lead Time Sea Weeks	Lead Time Air Weeks	DDP Price	Pack Size	FOB Price	Unit Price CIF
1	Atazanavir 300mg, Capsules, 30 Caps	180	900	16.00	6	3	17.00	30	15.70	15.97

Close



PAC Approval/ Rejection of Evaluation Report – **Due Diligence Approval**

MAUL-HSIP/MED/19/0301/06 - Evaluation Report

◀ Back

Evaluation Report Approval

Approval Details

Remarks

Contract Manager Approval

Negotiations Approval

Due Diligence Approval

Evaluation Report Approval

Due Diligence Approval

Details and Approval

Step 7.8(q)

Click on the 'Due Diligence Approval' tab.

Step 7.8 (r)

Click on the 'Details and Approval' button.



Criteria : Verify Financial Information**Suppliers that require due diligence****Due Diligence Approval**

#	Provider Name
1	EIM Solutions
2	Dummy Supplier

Step 7.8 (s)
Click on the 'Due Diligence Approval' button.

Team conducting Due Diligence

#	Name
1	Procurement Specialist

Due Diligence Questionnaire - Expected Response [YES]/[NO]

#	Question
1	Does the bidder/ supplier have audited financial statements (cash flow, balance sheet, income statement) for the last three years, including an auditor's report?
2	Does the bidder/ supplier have a schedule of accounts receivable and accounts payable?

Details

This process will ascertain whether the suppliers' business is financially sound.



Due Diligence Approval ×

Approval Action	Approve ▾
Remarks	Due diligence recommendation has been approved PAC Team. G

Submit

procurement.spinprocure.com says
PAC has approved due diligence to be conducted.

Close

OK

Step 7.8 (t)

- Click on the approval action drop down arrow and select the options provided. (**Approve or Reject**)
- Give a brief explanation for the selection above on the **remarks** field.
- Click the '**Submit**' button to complete the process.



Due Diligence Details



PAC approval status: **approved**

Criteria : Verify Financial Information

Suppliers that require due diligence

#	Provider Name
1	EIM Solutions
2	Dummy Supplier

Team conducting Due Diligence

#	Name
1	Procurement Specialist

Due Diligence Questionnaire - Expected Response [YES]/[NO]

#	Question
1	Does the bidder/ supplier have audited financial statements (cash flow, balance sheet, income statement) for the last three years, including an auditor's report?
2	Does the bidder/ supplier have a schedule of accounts receivable and accounts payable?

Details

This process will ascertain whether the suppliers' business is financially sound.



PAC Overall Approval/ Rejection of Evaluation Report

Step 7.8 (v)

- Click on the 'Approval Action' drop down arrow and select the options provided (**Approve Evaluation Report OR Reject Evaluation Report**).
- Give a brief explanation for the selection made above in the **Recommendations and remarks** field.
- Attach the **PAC Minutes** in the field provided.
- Click on the 'Submit' button to complete the process.



IMPORTANT

Make sure your attachment file is in PDF format

Step 7.8 (u)

Click on the 'Evaluation Report Approval' tab.

01/15 - Evaluation Report

← Back Evaluation Report Approval

Step 1 : Approval Step 2 : Negotiations Approval Step 3 : Due Diligence Approval **Step 4 : Evaluation Report Approval**

Approval action Approve Evaluation Report

Remarks The evaluation report has been approved.

Attach Minutes (Optional) Choose file PAC Minutes.pdf

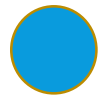
Submit

procurement.spinprocure.com says

Approval process done successfully.

OK

7.9 Financial Evaluation – Negotiation Process



This section will deal with the processes undertaken during the negotiation process between the bidders/ suppliers and MAUL negotiation team. This process will only take place if the PAC members approve the evaluation team's recommendation to conduct negotiation for a product (s)

The PA HOD/ PA Specialist will initiate the negotiation process using the e-Procurement's negotiation management feature. The following tasks will be performed in the system with regards to negotiation.

- The PA HOD/ PA Specialist and negotiation team will be able to send messages to bidders.
- The negotiation team will be able to view messages from both bidders and the PA HOD/ PA Specialist
- The negotiation team will be able to compare prices submitted by the bidders and perform price acceptance
- The negotiation team will be able to close the negotiation.



Negotiation Process – Sending Messages and Initiating Negotiation

The screenshot shows a procurement system interface. On the left is a navigation menu with items: Notifications, Catalogue, Suppliers Management, Requisitions, Solicitations Management, All Bid Solicitations, and Assigned Bid Solicitations. The 'Solicitations Management' and 'All Bid Solicitations' items are highlighted with yellow boxes. The main area displays a table titled 'All Procurements' with columns: Acquisition, Title, Procurement Status, Posting Status, Bid Submission Date, and Actions. The table contains five rows of procurement data. A yellow callout box labeled 'Step 7.9 (a)' points to the 'Solicitations Management' menu item and the 'All Bid Solicitations' sub-item, with text: 'The PA HOD/ PA Specialist will log in to the system and click on the 'Solicitation Management' drop down arrow and select 'All Bid Solicitations''. Another yellow callout box labeled 'Step 7.9 (b)' points to a 'View' button in the 'Actions' column of the first row, with text: 'Locate the relevant procurement document and click on the View button.' The 'View' button in the first row is also highlighted with a yellow box.

Acquisition	Title	Procurement Status	Posting Status	Bid Submission Date	Actions
	Supply of Medical Supplies - ARVs	closed		4/10/19, 11:00 AM	View Evaluation Report
	Purchase of Efavirenz Drugs	closed		3/15/19, 9:18 AM	View Evaluation Report
3	MAUL-TRDG/MED/01/0101/02	73	Purchase of Efavirenz Drugs	draft	View
4	MAUL-HSIP/MED/19/0104/17	72	Purchase of SMC	draft	View
5	MAUL-HSIP/MED/18/0404/16	67	Purchase of SMC	draft	View



Step 7.9 (c)
Click on the **Document Menu** drop down arrow and select **Negotiation Management**.

Solicitation Document

Reference: MAUL-HSIP/MED/18/0101/01

Title:	Supply of Medical Supplies - ARVs	Procurement Method	Limited Inter
Created	4/8/19, 4:31 PM	Procurement Agency Approval	approved o
Request Type	Request for Quotation (RFQ)	PAC Approval	approved on 4/9/19, 10:55 AM
Bid Validity Period	120 days		
Bidding Period	1 days		
Issue Date	4/9/19, 11:00 AM		
Quotation Submission Date	4/10/19, 11:00 AM		
Bid Opening Date	4/10/19, 11:00 AM		

Document Menu ▾

- View Requisition
- View Bids
- Negotiation Management**
- Evaluation Report



Price Negotiation for MAUL-HSIP/MED/18/0101/01 Procurement

[← Back](#) [Initiate Negotiations](#)

Negotiation Team

Name
Procurement Specialist
Ken Shabola

Bidders

Bidder's Name
Dummy Supplier
Tims Company
EIM Solutions

Products and Target Prices

#	Item Name	Lower Limit Qty	Upper Limit Qty	Unit Price Air EBB	Lead Time Sea Weeks	Lead Time Air Weeks	DDP Price	Pack Size	FOB Price	Unit Price CIF
1	Atazanavir 300mg, Capsules, 30 Caps	180	900	16.00	6	3	17.00	30	15.70	15.97

Negotiation activities and outcomes

Negotiation By Bidder

- 1. Dummy Supplier [Get Details](#) [Messages](#)
- 2. Tims Company [Get Details](#) [Messages](#)
- 3. EIM Solutions [Get Details](#) [Messages](#)

Step 7.9 (d)

Click on the **Messages** button for each supplier to send them messages concerning the negotiation process.



Negotiation activities and outcomes

Negotiation By Bidder

1. EIM Solutions [Get Details](#) [Refresh](#)

Subject	Atazanavir 300mg, Capsule, 30 Caps
Message	Dear <u>EIM Solutions</u> , MAUL Procurement Team hereby invites you to negotiate your price for the above mentioned drug MAUL Procurement Team
	Send

Negotiation Timeline

Step 7.9 (e)
Enter the relevant details of your message to the specific bidder.

The message has been sent to the supplier.



Price Negotiation for MAUL-HSIP/MED/18/0101/01 Procurement

[← Back](#) [Initiate Negotiations](#)

Negotiation Team

Name
Procurement Specialist
Ken Shabola

Bidders

Bidder's Name
Dummy Supplier
Tims Company
EIM Solutions

Step 7.9 (f)
Click on the **Initiate Negotiation** button to begin the negotiation process.

Products and Target Prices

#	Item Name	Lower Limit Qty	Upper Limit Qty	Unit Price Air EBB	Lead Time Sea Weeks	Lead Time Air Weeks	DDP Price	Pack Size	FOB Price	Unit Price CIF
1	Atazanavir 300mg, Capsules, 30 Caps	180	900	16.00	6	3	17.00	30	15.70	15.97

Negotiation activities and outcomes

Negotiation By Bidder

1. Dummy Supplier [Get Details](#) [Messages](#)
2. Tims Company [Get Details](#) [Messages](#)
3. EIM Solutions [Get Details](#) [Messages](#)

Click on the **Get Details** button to view initial quoted prices submitted by each bidder.



Price Negotiation for M 01/01 Procurement

Message to Suppliers

Send to suppliers

Step 7.9 (g)
Click on the **Send to Suppliers** button to inform bidders of the item being negotiated.

Negotiation Team

Name
Procurement Specialist
Ken Stabola

Bidders

Bidder's Name
Dummy Supplier
Tims Company

← Back Intiate Negotiations

procurement.spinprocure.com says
Are you sure you want to send to suppliers?

OK Cancel

Price Negotiation details sent to suppliers successfully



Negotiation Process – Receiving Messages

Repeat **Step 7.9 (a) - (c)** to access the messages functionality.
Click on the **Messages** button next to each bidder as explained in **Step 7.9 (d)**

1. EIM Solutions [Get Details](#) [Messages](#)
2. Dummy Supplier [Get Details](#) [Refresh](#)

Subject Atazanavir 300mg, Capsules, 30 Capsules

Message Dear Dummy Supplier,
The deadline for submissions is 31.10.2019 at Noon (12:00 PM)
MAUL Negotiation Team

[Send](#)

Enter the relevant details of your message as indicated in **Step 7.9 (e)**

The right hand side of the window shows correspondence between MAUL Procurement Team and the specific bidder.

Negotiation Timeline

Atazanavir 300mg, Capsules, 30 Capsules

48 minutes ago by supplier team

Dear MAUL Procurement Team,
Thank you for the opportunity to negotiate prices for the mentioned drug.
Kindly communicate your deadline for submission.
Dummy Supplier

Atazanavir 300mg, Capsules, 30 Capsules

1 hour, 32 minutes ago by procurement team

Dear Dummy Supplier,
MAUL Procurement hereby invites you to negotiate your price for the above mentioned drug
MAUL Procurement team.



Negotiation Process – Price Acceptance

After bidders have submitted their negotiated prices, a member of the negotiation team will log in to the system and perform price acceptance while comparing with the targeted prices preferred by MAUL. **The negotiation team will receive system and email notifications after bidders' submission of negotiated prices.**

The screenshot displays a procurement system interface. On the left is a dark navigation sidebar with a dropdown menu for 'Solicitations Management' which is open, showing 'All Bid Solicitations' and 'Assigned Bid Solicitations'. The main area shows a table of procurement solicitations. A yellow callout box points to the 'Solicitations Management' menu, and another yellow callout box points to a 'View' button in the 'Actions' column of the table.

Step 7.9 (h)
Click on the 'Solicitation Management' drop down arrow and select 'All Bid Solicitations'.

Step 7.9 (i)
Locate the relevant procurement document and click on the **View** button.

Requisition	Title	Procurement Status	Posting Status	Bid Submission Date	Actions
	Supply of Medical Supplies - ARVs	closed		4/10/19, 11:00 AM	View Evaluation Report
	Purchase of Efavirenz Drugs	closed		3/15/19, 9:18 AM	View Evaluation Report
3	MAUL-TRDG/MED/01/0101/02	73	Purchase of Efavirenz Drugs	draft	View
4	MAUL-HSIP/MED/19/0104/17	72	Purchase of SMC	draft	View
5	MAUL-HSIP/MED/18/0404/16	67	Purchase of SMC	draft	View



Step 7.9 (j)
Click on the **Document Menu** drop down arrow and select **Negotiation Management**.

Solicitation Document

Reference: MAUL-HSIP/MED/18/0101/01

Title:	Supply of Medical Supplies - ARVs	Procurement Method	Limited Inter
Created	4/8/19, 4:31 PM	Procurement Agency Approval	approved o
Request Type	Request for Quotation (RFQ)	PAC Approval	approved on 4/9/19, 10:55 AM
Bid Validity Period	120 days		
Bidding Period	1 days		
Issue Date	4/9/19, 11:00 AM		
Quotation Submission Date	4/10/19, 11:00 AM		
Bid Opening Date	4/10/19, 11:00 AM		

Document Menu ▾

- View Requisition
- View Bids
- Negotiation Management**
- Evaluation Report



Negotiation Team

Name
Procurement Specialist
Ken Shabola

Bidders

Bidder's Name
Dummy Supplier
Tims Company
EIM Solutions

Products and Target Prices

#	Item Name	Lower Limit Qty	Upper Limit Qty	Unit Price Air EBB	Lead Time Sea Weeks	Lead Time Air Weeks	DDP Price	Pack Size	FOB Price	Unit Price CIF
1	Atazanavir 300mg, Capsules, 30 Caps	180	900			3	17.00	30	15.70	15.97

Step 7.9 (k)
 Click on the **Get Details** button for each bidder in order to compare the new prices.

Negotiation activities and outcomes

Negotiation By Bidder

- 1. Dummy Supplier [Get Details](#) [Messages](#)
- 2. Tims Company [Get Details](#) [Messages](#)
- 3. EIM Solutions [Get Details](#) [Messages](#)

Negotiation By Item

- 1. Atazanavir 300mg, Capsules, 30 Caps [Price Details](#)



Negotiation activities and outcomes

Negotiation By Bidder

1. Dummy Supplier [Refresh](#) [Messages](#)

Note:

The initial quoted prices submitted by the bidders are displayed here.

Note:

The new negotiated prices submitted by the bidders are displayed here.

Item Details			Price as per quotation (USD)							Negotiated Prices (USD)							Actions
Item	UOM	Negotiated Price Status	Unit Price Air EBB	Lead Time Sea Weeks	Lead Time Air Weeks	DDP Price	Pack Size	FOB Price	Unit Price CIF	Unit Price Air EBB	Lead Time Sea Weeks	Lead Time Air Weeks	DDP Price	Pack Size	FOB Price	Unit Price CIF	
Atazanavir 300mg, Capsules, 30	30/pack	not accepted	17.20	7	4	18.00	30	16.50	16.97	16.75	7	4	17.20	30	15.85	16.37	Price Acceptance

If price is accepted, the negotiation price status will change from **Not Accepted** to **Accepted**.

Step 7.9 (I)

Click on the **Price Acceptance** button if the bidders' negotiated price is acceptable.

Note:

If the negotiated price is not acceptable, **DO NOT** click on this button.



Price Negotiation for MAUL-HSIP/MED/18/0101/01 Procurement

Back Close Negotiation

Negotiation Team

Name
Procurement Specialist
Ken Shabola

Bidders

Bidder's Name
Dummy Supplier
Tims Company
EIM Solutions

Step 7.9 (m)
Click on the **Close Negotiation** button if the negotiation process is complete.

Note:
If the process is not complete and bidders are still submitting revised prices, **DO NOT** click on this button.

Products and Target Prices

#	Item Name	Lower Limit Qty	Upper Limit Qty	Unit Price Air EBB	Lead Time Sea Weeks	Lead Time Air Weeks	DDP Price	Pack Size	FOB Price	Unit Price CIF
1	Atazanavir 300mg, Capsules, 30 Caps	180	900	16.00	6	3	17.00	30	15.70	15.97

Negotiation has been closed.

procurement.spinprocure.com says

Are you sure you want to close the price negotiations?

OK Cancel



After the negotiation team has completed the price acceptance, the bid manager will log in to the system and finalize on the financial evaluation of the item that required negotiation. The Bid Manager will perform the following tasks:

1. Log in to the system
2. Access the main menu, click on the **Solicitation Management** drop down arrow.
3. Select the **All Bids Solicitation** option.
4. Locate the relevant procurement document in the **All Procurements** section.
5. Click the **View** button
6. Click on the **Document Menu** Drop down arrow.
7. Select the **View Bids** option.
8. Click on the **Financial Evaluation** button to complete the financial evaluation of the item that was undergoing the negotiation process.



Step 7.9 (n)

Click on the **Item Evaluation** button for the item that is in the negotiation phase.

3. Atazanavir 300mg, Capsules, 30 Caps

Quantity Required: 1,000, Unit of Measure: pack **Item Evaluation** Evaluation Status : **To Negotiate**

#	Provider Name	Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Selected to Award	Rank
1	Dummy Supplier	30	16.50	17.20	16.97	18.00	4	7	No	3
2	EIM Solutions	30	15.75	16.90	16.50	17.50	4	7	No	1
3	Tims Company	30	16.75	17.23	16.77	17.95	3	7	No	2



[How to Evaluate Financials](#)
[Evaluate](#)
[Upload Files](#)

#	Attachment Name	Actions
1	Negotiation Report	View Download Delete

Evaluation Status : **To Negotiate**

Evaluation Remarks : The evaluation Team has chosen to further negotiate with the suppliers as their prices are above the benchmark.

Step 7.9 (o)
Click on the **Rank** button to rank the bidders with regards to the new negotiated prices.

Negotiated Prices							Negotiation Status	Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Air Weeks	Weeks	Rank	Action
Lead Time Sea Weeks	Lead Time Air Weeks	DDP Price	Pack Size	FOB Price	Unit Price CIF											
6.00	4.00	17.25	30.00	15.70	16.25	accepted	30	15.75	16.90	16.50	17.50	4	7	1	Rank	
6.00	4.00	17.13	30.00	15.85	16.37	accepted	30	16.75	17.23	16.77	17.95	3	7	2	Rank	
7.00	4.00	17.20	30.00	15.85	16.37	accepted	30	16.50	17.20	16.97	18.00	4	7	3	Rank	

The system will display the new negotiated prices (left) alongside the previous quoted prices (Right).

Step 7.9 (p)

- Enter the rank position in the **Rank** field provided.
- Click on the **Change Rank** button to complete the process.

Change the Bidder Rank

Rank

Change Rank

Close

procurement.spinprocure.com says
Rank details updated successfully.

OK



Financial Evaluation for Atazanavir 300mg, Capsules, 30 Caps Recommended Quantity is 900

Add Benchmark

Add/Change Recommended Quantity

◀ Back

How to Evaluate Financials

Evaluate

Upload Files

Step 7.9 (q)
Click on the Evaluate button to re-evaluate the item.

#	Attachment Name	Actions
		View Download Delete

Eva

Evaluation Remarks : The evaluation team has chosen to further negotiate with the suppliers as their prices are above the benchmark.

#	Provider Name	Recommended Quantity	BenchMark Prices		% Variances		Negotiated Prices					
			GF PPM	GHSC-PSM	GF PPM	GHSC-PSM	Unit Price Air EBB	Lead Time Sea Weeks	Lead Time Air Weeks	DDP Price	Pack Size	FOB Price
1	Tims Company	900	17.00	16.84	5.59	6.59	16.55	6.00	4.00	17.13	30.00	15.85
2	Dummy Supplier	900	17.00	16.84	5.88	6.89	16.75	7.00	4.00	17.20	30.00	15.85
3	EIM Solutions	900	17.00	16.84	2.94	3.92	16.45	6.00	4.00	17.25	30.00	15.70



Evaluation for Atazanavir 300mg, Capsules, 30 Caps

Evaluation Decision

To Award

Reason for Selection above

Submit

Close

Step 7.9 (r)

- Click on the **Evaluate Decision** drop down arrow and select the Award option.
- You can also enter **Reasons** for the above selection on the field provided.
- Click the **Submit** button to complete the process.



7.10 Financial Evaluation – Due Diligence Process

- This section will deal with the processes undertaken during the due diligence process between the bidders/suppliers and MAUL negotiation team. This process will only take place if the PAC members approve the evaluation team's recommendation to conduct due diligence.
Due diligence will be initiated by the team selected to conduct the process using the e-Procurement's due diligence management feature. The following tasks will be performed in the system with regards to due diligence.
 - The due diligence team will be able to verify whether bidders have relevant qualifications with regards to the due diligence criteria
 - The due diligence team will be able to answer the due diligence questionnaire using affirmative Yes/ No answers.
 - The due diligence team will be able to close the due diligence process after verification of all bidders is complete.



Due Diligence Process

The screenshot shows a procurement system interface. On the left is a dark sidebar with navigation items: Notifications, Catalogue, Suppliers Management, Requisitions, Solicitations Management (highlighted with a yellow box), All Bid Solicitations (highlighted with a yellow box), and Assigned Bid Solicitations. The main content area is titled 'All Procurements' and contains a table with columns: Solicitation, Title, Procurement Status, Posting Status, Bid Submission Date, and Actions. Two callout boxes are present: one pointing to the 'Solicitations Management' menu item and another pointing to a 'View' button in the Actions column of the first row.

Solicitation	Title	Procurement Status	Posting Status	Bid Submission Date	Actions
	Supply of Medical Supplies - ARVs	closed		4/10/19, 11:00 AM	View Evaluation Report
	Purchase of Efavirenz Drugs	closed		3/15/19, 9:18 AM	View Evaluation Report
3	MAUL-TRDG/MED/01/0101/02	73	Purchase of Efavirenz Drugs	draft	View
4	MAUL-HSIP/MED/19/0104/17	72	Purchase of SMC	draft	View
5	MAUL-HSIP/MED/18/0404/16	67	Purchase of SMC	draft	View

Step 7.10 (a)
The PA HOD/ PA Specialist will log in to the system and click on the 'Solicitation Management' drop down arrow and select 'All Bid Solicitations'.

Step 7.10 (b)
Locate the relevant procurement document and click on the View button.



Solicitation Document

Reference: MAUL-HSIP/MED/19/0301/06

Title:	Supply of ARVs for Yr 2019
Created	10/17/19, 10:50 AM
Request Type	Request for Quotation (RFQ)
Bid Validity Period	50 days
Bidding Period	1 days
Issue Date	10/17/19, 1:10 PM
Quotation Submission Date	10/18/19, 1:10 PM
Bid Opening Date	10/18/19, 1:10 PM

Procurement Method	Limited Int
Procurement Agency Approval	approved
PAC Approval	approved

Step 7.10 (c)

Click on the **Document Menu** drop down arrow and select **Due Diligence Management**.

Document Menu ▾

View Requisition

View Bids

Negotiation Management

Due Diligence Management

Evaluation Report



Suppliers Due Diligence

[← Back](#)[Close Due Diligence](#)

Criteria : Verify Financial Information

Details

This process will ascertain whether the suppliers' business is financially sound.

Bidders

Bidder's Name	Action
EIM Solutions	Questionnaire
Du	Questionnaire

Step 7.10 (d)
Click on the
Questionnaire button.

Questionnaire

#	Question
1	Does the bidder/ supplier have audited financial statements (cash flow, balance sheet, income statement) for the last three years, including an auditor's report?
2	Does the bidder/ supplier have a schedule of accounts receivable and accounts payable?

Outcome of the Due Diligence

#	Questions	EIM Solutions	Dummy Supplier
1	Does the bidder/ supplier have audited financial statements (cash flow, balance sheet, income statement) for the last three years, including an auditor's report?		
2	Does the bidder/ supplier have a schedule of accounts receivable and accounts payable?		



Suppliers Due Diligence Questionnaire

Bidder: EIM Solutions

#	Question	Status	Appropriate Response
1	Does the bidder/ supplier have audited financial statements (cash flow, balance sheet, income statement) for the last three years, including an auditor's report?		<input checked="" type="button" value="Yes"/> <input type="button" value="No"/>
2	Does the bidder/ supplier have a schedule of accounts receivable and accounts payable?		<input type="button" value="Yes"/> <input type="button" value="No"/>

Step 7.10 (e)
Click on the Yes/ No button depending on bidder's response.

Close

Posting Status

Response has been added successfully.

Close

Suppliers Due Diligence

[← Back](#)[Close Due Diligence](#)

Criteria : Verify Financial Information

Details

This process will ascertain whether the suppliers' business is financially sound.

Bidders

Bidder's Name	Action
EIM Solutions	Questionnaire
Dummy Supplier	Questionnaire

Questionnaire

#	Question
1	Does the bidder/ supplier have audited financial statements (cash flow, balance sheet, income statement) for the last three years?
2	Does the bidder/ supplier have a schedule of accounts receivable and accounts payable?

After filling out the questionnaire responses, the results will be displayed at the bottom of the due diligence window.

Outcome of the Due Diligence

#	Questions	EIM Solutions	Dummy Supplier
1	Does the bidder/ supplier have audited financial statements (cash flow, balance sheet, income statement) for the last three years, including an auditor's report?	Yes	Yes
2	Does the bidder/ supplier have a schedule of accounts receivable and accounts payable?	Yes	Yes



Suppliers Due Diligence

← Back

Close Due Diligence

Criteria : Verify Financial Information

Details

This process will ascertain whether the suppliers' business is financially sound.

Bidders

Bidder's Name	Action
EIM Solutions	Questionnaire
Dummy Supplier	Questionnaire

Questionnaire

#	Question
1	Does the bidder/ supplier have audited financial statements (cash flow, balance sheet, income statement) for the last three years, including an auditor's report?
2	Does the bidder/ supplier have a schedule of accounts receivable and accounts payable?

Outcome of the Due Diligence

#	Questions	EIM Solutions	Dummy Supplier
1	Does the bidder/ supplier have audited financial statements (cash flow, balance sheet, income statement) for the last three years, including an auditor's report?	Yes	Yes
2	Does the bidder/ supplier have a schedule of accounts receivable and accounts payable?	Yes	Yes



procurement.spinprocure.com says

Are you sure you want to close the due diligence exercise?

[OK](#) [Cancel](#)

Due diligence event has been closed. Notifications has been sent to the bid manager.





After the due diligence team has completed the verification process, the bid manager will log in to the system and finalize on the financial evaluation of the item that required due diligence. The Bid Manager will perform the following tasks:

1. Log in to the system
2. Access the main menu, click on the **Solicitation Management** drop down arrow.
3. Select the **All Bids Solicitation** option.
4. Locate the relevant procurement document in the **All Procurements** section.
5. Click the **View** button
6. Click on the **Document Menu** Drop down arrow.
7. Select the **View Bids** option.
8. Click on the **Financial Evaluation** button to complete the financial evaluation of the item that was undergoing the due diligence process.



Step 7.10 (f)

Click on the **Item Evaluation** button for the item that is in the due diligence phase.

2. Abacavir 60mg, Tablets, 30 Tabs

Quantity Required: 1,000, Unit of Measure: Pack **Item Evaluation** Evaluation Status : **To Due Diligence**

#	Provider Name	Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Selected to Award	Rank
1	Dummy Supplier	30	3.00	3.97	3.75	4.05	1	4	No	1
2	EIM Solutions	30	3.30	4.10	4.01	4.75	2	4	No	2



[How to Evaluate Financials](#)
[Evaluate](#)
[Upload Files](#)

Step 7.10 (h)
 Click on the **Evaluate** button to re-evaluate the item.

Step 7.10 (g)
 Click on the **Rank** button to rank the bidders with regards to the new due diligence results

#	Provider Name	Recommended Quantity	BenchMark Prices GF PPM	% Variances GF PPM	Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Weeks	Rank	Actions
1	Dummy Supplier	1,000	5.00	-19.00	30	3.00	3.97	3.75	4.05	1	4	1	Rank
2	EIM Solutions	1,000	5.00	-5.00	30	3.30	4.10	4.01	4.75	2	4	2	Rank

Suppliers Due Diligence

#	Questions	EIM Solutions	Dummy Supplier
1	Does the bidder/ supplier have audited financial statements (cash flow, balance sheet, income statement) for the last three years, including an auditor's report?	Yes	Yes
2	Does the bidder/ supplier have a schedule of accounts receivable and accounts payable?	Yes	Yes



Evaluation for Abacavir 60mg, Tablets, 30 Tabs

Evaluation Decision

To Award

Reason for Selection above

Awarded

Submit

Close


Step 7.10 (i)

- Click on the **Evaluate Decision** drop down arrow and select the Award option.
- You can also enter **Reasons** for the above selection on the field provided.
- Click the **Submit** button to complete the process.



8.0 AWARDS

 To award contracts to bidders, the evaluation process should be complete and at least one of the product's recommendation status reads '**To Award**'. These conditions will make the '**Create Award (s) Contract**' functionality available.

 After the evaluation team has completed all necessary evaluation tasks, and the evaluation report has been reviewed and approved by PA HOD/ PA Specialist and the PAC team members respectively. The Bid Manager will perform the following tasks:

1. Log in to the system
2. Access the main menu, click on the **Solicitation Management** drop down arrow.
3. Select the **All Bid Solicitations** option.
4. Locate the relevant procurement document in the **All Procurements** section.
5. Click the **View** button
6. Click on the **Document Menu** Drop down arrow.
7. Select the **View Bids** option.
8. Click on the **Financial Evaluation** button.
9. Click on the **Item Evaluation** button for products that have the '**To Award**' status only.
10. Click on the **Create Award (s) Contract** button to begin the awards process (**See Next Page**).



8.1 Awarding Contracts to Bidders

Financial Evaluation for Abacavir 60mg, Tablets, 30 Tabs Recommended Quantity is 1,000

[Add Benchmark](#)
[Add/Change Recommended Quantity](#)
[Back](#)

[How to Evaluate Financials](#)
[Evaluate](#)
[Create Award\(s\) contracts](#)
[Upload Files](#)

#	Attachment Name	Actions
---	-----------------	---------

Evaluation Status : [To Award](#)

Evaluation Remarks :

Step 8.1 (a)
Click on the 'Create Award (s) Contracts' button.
Note:
This button will disappear after awarding a contract to a bidder.

#	Provider Name	Recommended Quantity	BenchMark Prices		% Variances		Pack Size	Price	Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Rank	Actions
			GF PPM	GHSC-PSM	GF PPM	GHSC-PSM									
1	Dummy Supplier	1,000	5.25	5.25	-22.86	-22.86	30	3.00	3.97	3.75	4.05	1	4	1	Rank
2	EIM Solutions	1,000	5.25	5.25	-9.52	-9.52	30	3.30	4.10	4.01	4.75	2	4	2	Rank
3	Tims Company	1,000	5.25	5.25	4.76	4.76	30	3.20	4.00	3.90	5.50	3	5	3	Rank



Add Awards Contracts ×

Product Name

Select Award Method

Select Supplier to award 100%

Step 8.1 (b)

- Click on the **Select Award Method** drop down arrow and select the options provided (**Method 100%**, **Method 60%-40%**, or **Method 50%-30%-20%**)
- Once you select the award method, the **Select Supplier to Award** field will appear based on the award options selected above. Click on the drop down arrow and select the relevant supplier.
- Click on the **Award** button to complete the process.

procurement.spinprocure.com says
Awards posted successfully.



After completing **Step 8.1 (b)**, the 'Evaluation Complete' status will appear to show that a bidder has been awarded the specific contract.

2. Abacavir 60mg, Tablets, 30 Tabs

Quantity Required: 1,000, Unit of Measure: Pack Item Evaluation Evaluation Complete Evaluation Status : To Award

#	Provider Name	Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Selected to Award	Rank
1	EIM Solutions	30	3.30	4.10	4.01	4.75	2	4	No	2
2	Tims Company	30	3.20	4.00	3.90	5.50	3	5	No	3
3	Dummy Supplier	30	3.00	3.97	3.75	4.05	1	4	Yes	1

Once a bidder is awarded a contract, the system will display the award status as 'Yes'.



Financial Evaluation for

After awarding contracts, the system will display the status **Financial Evaluation Complete**.

Financial Evaluation Complete

View Evaluation Report

View Awards

Financial Evaluation Summary

Click on the **Financial Evaluation Summary** button to view the final results of the financial evaluation.

1. Efavirenz 50mg, Capsules, 30 Caps

Quantity Required: 1,000, Unit of Measure: pack **Item Evaluation** Evaluation Status :

#	Provider Name	Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Selected to Award	Rank
1	Dummy Supplier	30	1.75	2.50	2.40			5	No	-
2	EIM Solutions	30	1.50	1.75	1.97			4	No	-
3	Tims Company	30	1.90	2.50	2.35	2.77	2	4	No	-

Click on the **View Awards** button to see how bidders have been awarded contracts based on a predefined Award Method.

2. Abacavir 60mg, Tablets, 30 Tabs

Quantity Required: 1,000, Unit of Measure: Pack **Item Evaluation** **Evaluation Complete** Evaluation Status : **To Award**

#	Provider Name	Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Selected to Award	Rank
1	EIM Solutions	30	3.30	4.10	4.01	4.75	2	4	No	2
2	Tims Company	30	3.20	4.00	3.90	5.50	3	5	No	3
3	Dummy Supplier	30	3.00	3.97	3.75	4.05	1	4	Yes	1

3. Atazanavir 300mg, Capsules, 30 Caps

Quantity Required: 1,000, Unit of Measure: pack **Item Evaluation** **Evaluation Complete** Evaluation Status : **To Award**

#	Provider Name	Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Selected to Award	Rank
1	Dummy Supplier	30	16.50	17.20	16.97	18.00	4	7	No	3
2	EIM Solutions	30	15.75	16.90	16.50	17.50	4	7	Yes	1



8.2 Generate Purchase Orders

Financial Evaluation for MAUL-HSIP/MED/19/0101/02

Financial Evaluation Complete

View Evaluation Report

View Awards

Financial Evaluation Summary

← Back to Bids

1. Efavirenz 50mg, Capsules, 30 Caps

Quantity Required: 1,000, Unit of Measure: pack Item Evaluation Evaluation Status :

#	Provider Name	Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Selected to Award	Rank
1	Dummy Supplier	30	1.75	2.50	2.40	2.60	2	5		
2	EIM Solutions	30	1.50	1.75	1.97	2.20	1	4	No	-
3	Tims Company	30	1.90	2.50	2.35	2.77	2	4	No	-

Step 8.2 (a)
Click on the 'View Awards' button.

2. Abacavir 60mg, Tablets, 30 Tabs

Quantity Required: 1,000, Unit of Measure: Pack Item Evaluation Evaluation Complete Evaluation Status : To Award

#	Provider Name	Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Selected to Award	Rank
1	EIM Solutions	30	3.30	4.10	4.01	4.75	2	4	No	2
2	Tims Company	30	3.20	4.00	3.90	5.50	3	5	No	3
3	Dummy Supplier	30	3.00	3.97	3.75	4.05	1	4	Yes	1

3. Atazanavir 300mg, Capsules, 30 Caps

Quantity Required: 1,000, Unit of Measure: pack Item Evaluation Evaluation Complete Evaluation Status : To Award

#	Provider Name	Supplier Pack Size	FOB Price	Unit Price Air EBB	Unit Price CIF	DDP Price	Lead Time Air Weeks	Lead Time Sea Weeks	Selected to Award	Rank
1	Dummy Supplier	30	16.50	17.20	16.97	18.00	4	7	No	3
2	EIM Solutions	30	15.75	16.90	16.50	17.50	4	7	Yes	1



Awards contracts

[Back](#)[View Awards By Bidders](#)[Award Settings](#)[Create Purchase Orders](#)

#	Item Name	Formulation	Pack Size	Providers	% Split	Total	Qty/Bidder
1	Abacavir 60mg, Tablets, 30 Tabs	Dispersible tablet	30	Dummy Supplier	100%		
2	Atazanavir 300mg, Capsules, 30 Caps	Film coated tablet	30	EIM Solutions	100%		

[< previous](#) [next >](#)

Page 1 of 1, showing 2 record(s) out of 2 total

Step 8.2 (b)

Click on the 'Award Settings' button to begin selecting columns that will appear in the Purchase Orders.

The system will display **ALL** awards related to the specific procurement document and their respective award details.



Awards contracts

Back

View Awards By Bidders

Award Settings

Create Purchase Orders

Select Award
Details Fields
(Use Ctrl Key
to select more
than 1)

DDP Price
Lead Time Sea Weeks
Lead Time Air Weeks
Supplier Pack Size
FOB Price
Unit Price CIF
Unit Price Air EBB

Add

Award detail fields

#	Field name	Alias / Other name	Order of Appearance	Require Total Field	Actions
---	------------	--------------------	---------------------	---------------------	---------

Step 8.2 (c)

Select the columns that will be visible in the Purchase Orders.

Note:

Press on the Ctrl Key to select multiple fields.

Step 8.2 (d)

Click on the 'Add' button to complete the process.

procurement.spinprocure.com says

The field(s) selected has been saved.

OK

Awards contracts

[Back](#)[View Awards By Bidders](#)[Award Settings](#)[Create Purchase Orders](#)

Select Award
Details Fields
(Use Ctrl Key
to select more
than 1)

Add

DDP Price
Lead Time Sea Weeks
Lead Time Air Weeks
Supplier Pack Size
FOB Price
Unit Price CIF
Unit Price Air EBB

Award detail fields

#	Field name	Alias / Other name	Order of Appearance	Require Total Field	Actions
1	FOB Price			No	Edit Field Remove
2	Unit Price Air EBB			No	Edit Field Remove
3	Lead Time Air Weeks			No	Edit Field Remove
4	Supplier Pack Size			No	Edit Field Remove
5	DDP Price			No	Edit Field Remove

Once you complete **Step 8.2 (d)**, the selected columns/ fields will be visible on the right-hand side of the windows as displayed on the image.



Awards contracts

[Back](#)[View Awards By Bidders](#)[Award Settings](#)[Create Purchase Orders](#)

Select Award
Details Fields
(Use Ctrl Key
to select more
than 1)

DDP Price
Lead Time Sea Weeks
Lead Time Air Weeks
Supplier Pack Size
FOB Price
Unit Price CIF
Unit Price Air EBB

Add

Award detail fields

#	Field name	Alias / Other name	Order of Appearance	Required	Actions
1	FOB Price				Edit Field Remove
2	Unit Price Air EBB			No	Edit Field Remove
3	Lead Time Air Weeks			No	Edit Field Remove
4	Supplier Pack Size			No	Edit Field Remove
5	DDP Price			No	Edit Field Remove

Step 8.2 (e)

Click on the 'Create Purchase Orders' button to begin the process of creating POs.



Generate the bidder purchase orders

[Back](#)[View Awards By Bidders](#)[Award Settings](#)[Create Purchase Orders](#)

Select Bidder

EIM Solutions
Dummy Supplier

Step 8.2 (f)

Click on the drop down arrow and select the bidder whose Purchase Order you want to create.



Generate the bidder purchase orders

[Back](#)[View Awards By Bidders](#)[Award Settings](#)[Create Purchase Orders](#)

Select Bidder EIM Solutions

Adjust the quantity. Leave blank if you don't want to allocate a line item to a purchase order.

[View Purchase Orders](#)[View Award](#)

Step 8.2 (i)

Click on the Add button to complete the process.

Delivery Date

2019

June

13

Step 8.2 (g)

Enter the delivery date for the Purchase Order

Order quantity

Award quantity

Allocated

1.

Atazanavir 300mg, Capsules, 30 Caps

500

1000

-

Add

Step 8.2 (h)

Enter the Order Quantity for the Purchase Order.

Note:

You can enter smaller portions quantity wise to enable you to generate multiple Purchase Orders for a specific bidder.

procurement.spinprocure.com says

A purchase order has been generated

OK



Generate the bidder purchase orders

[Back](#)[View Awards By Bidders](#)[Award Settings](#)[Create Purchase Orders](#)

Select Bidder

EIM Solutions

Adjust the quantity. Leave blank if you don't want to allocate a line item to a purchase order.

[View Purchase Orders](#)[View Award](#)

Delivery Date

Serial	Item name	Order quantity	Award quantity	Allocated	Unallocated
1.	Atazanavir 300mg, Capsules, 30 Caps	<input type="text"/>	1000	500	500

[Add](#)

- **Award Quantity** – This is the recommended quantity indicated by the evaluation team during the evaluation process.
- **Allocated** – This is the Order Quantity defined for a PO
- **Unallocated** – This is the difference between the Award and Allocated Quantities.

Generate the bidder purchase orders

[Back](#)[View Awards By Bidders](#)[Award Settings](#)[Create Purchase Orders](#)

Select Bidder

EIM Solutions

Adjust the quantity. Leave blank if you don't want to allocate a line item to a purchase order.

[View Purchase Orders](#)[View Award](#)

Delivery Date



Serial

Item name

Order quantity

Award quantity

Unallocated

1.

Atazanavir 300mg, Capsules, 30 Caps

1000

500

[Add](#)

Step 8.2 (j)

Click the **View Purchase Orders** to display a list of procurement references for which POs have been generated.



Step 8.2 (k)

Click the View Purchase Order button to display details of the purchase Order.

EIM Solutions Purchase Orders for MAUL-HSIP/MED/19/0101/02

#	Procurement Reference	Date of Delivery	Actions
1	MAUL-HSIP/MED/19/0101/02	6/13/19	View Purchase Order

Bidder Name : EIM Solutions

Print

Reference : MAUL-HSIP/MED/19/0101/02

Supplier Code : SAP001

Delivery Date : 13-06-2019

#	Item	Quantity	FOB Price	Unit Price Air EBB	Lead Time Air Weeks	Supplier Pack Size	DDP Price
1	Atazanavir 300mg, Capsules, 30 Caps	500	15.70	16.90	3	30	16.95

After executing Step 8.2 (k), the system will display the Purchase Order details.



Generate the bidder purchase orders

[Back](#)[View Awards By Bidders](#)[Award Settings](#)[Create Purchase Orders](#)

Select Bidder

EIM Solutions

Adjust the quantity. Leave blank if you don't want to allocate a line item to a purchase order.

[View Purchase Orders](#)[View Award](#)

Delivery Date



Serial	Item name	Order quantity	Award quantity	Allocated
1.	Atazanavir 300mg, Capsules, 30 Caps	<input type="text"/>	1000	750

[Add](#)

Step 8.2 (l)

Click the **View Award** button to display the Award details for the specific bidder.



Provider Name : EIM Solutions

Procurement : MAUL-HSIP/MED/19/0101/02

Supplier Code : SAP001

Delivery Date : *Not available*



#	Item	Quantity	FOB Price	Unit Price Air EBB	Lead Time Air Weeks	Supplier Pack Size	DDP Price
1	Atazanavir 300mg, Capsules, 30 Caps	1,000	15.70	16.90	3	30	16.95

