User Guide: Supplier Response Wizard

Document no.:	eGCOM-00010
Version:	1.0
Date:	On approval

Notice

Document enquiries can be directed to:

Document and Records Management Office
SITA SOC Ltd
PO Box 26100, Monument Park, 0105, South Africa Tel: +27 12 482 3000 www.sita.co.za

Title: User Guide: Supplier Response Wizard
No.: eGCOM10_1-0
Author/originator: Ursula Uys – ursula.uys@sita.co.za

Amendment history

Version	Date	Change proposal	Change comment
1.0	2018-06-22	New document	First release

Table of contents

Table of figures

Table of tables

Abbreviations and definitions

Abbreviations

CSD	Central Supplier Database
RFB	Request for bid
RFQ	Request for quotation
RFX	Request for quotations or bids
SCM	Supply Chain Management
SITA	State Information Technology Agency

Definitions

gCommerce	The gCommerce platform is a central sourcing platform where suppliers and practitioners can perform activities aimed at modernising, simplifying, standardising and automating Supply Chain Management functions across all spheres of government.

Overview

1. Purpose of the user guide

This user guide is intended to be used by suppliers responding to RFXs (requests for quotes and/or bids) on the SITA gCommerce portal.

2. References

- SITA instructional processes and standards [0145-00048].
- Document layout, writing and typing standard [eITKM-00002].


NOTE

The latest revision of a document applies.

3. Typographical conventions

The typographical conventions used in this document are described in Error! Reference source not found..

Table 1 - Typographical conventions

Convention	Object or term	Example
Upper case	Report names	The PENDING DOCUMENT report will be generated.
Bold	Option to be selected from a menu (consecutive menu options are separated by a vertical line)	Select Edit | Copy from the main menu.
	Window, screen or dialog box name	The Notepad window will be displayed.
	Field name as it is displayed in the window, dialog box or screen	Type the username in the Username field.

	Message as it is displayed on the window or screen	A message, Click here to begin, will be displayed.
	Button or option in a dialog box, toolbar or window	Click on the OK button.
	Text to be entered in a field or	Type Y in the Indicator field.

Convention	Object or term	Example
	selected from a list	Select Calibri Light in the Font list box.
	Key as it is displayed on the keyboard	Type the necessary information and press Enter.
	Keys separated by "+" are to be pressed simultaneously	Press Alt+Tab to switch between applications.
>	This symbol indicates consecutive menu options to be selected during a process	Select Object > Ledger from the CALMIS Main menu.
 NOTE	Indication of a note	You can also display the …
 EXAMPLE	Indication of an example	The following example illustrates …

 NOTE

When a window, screen, or dialog box name is stated in a caption, it will not be in bold. When field names are listed in the Field column of a table, it will not be in bold.

Chapter 1 - Introduction

1. Introduction

gCommerce is a government-owned, managed and supported source-to-pay solution that is aligned to the Supply Chain Management (SCM) legislative prescripts, in support of the government-wide SCM reform initiative aimed at modernising, simplifying, standardising and automating SCM functions across all spheres of government. This includes the simplification of responding to RFXs by enabling suppliers to respond online.

The purpose of the user manual is to assist suppliers in utilising the Supplier Response Wizard when responding to RFXs on the gCommerce portal.

2. User access

The following procedure must be followed to access and complete RFXs online on the gCommerce portal:

1. All potential bidders must be registered on the Central Supplier Database (CSD) at www.csd.gov.za.
2. After registration on the CSD, potential bidders must request gCommerce logon details by sending their CSD number to gcommerce@sita.co.za or contacting the gCommerce service centre on 0800 611 2011.

Upon registration you will be supplied with a user name, user code and password to log into the Supplier Response Wizard module.

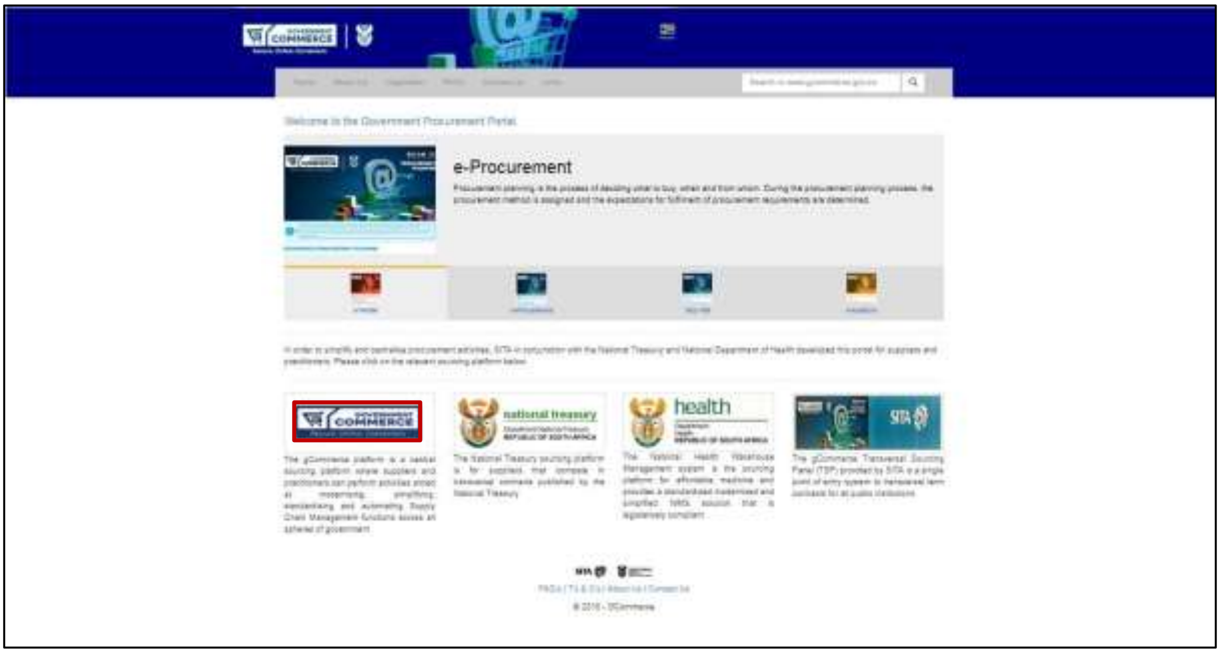
3. Accessing the Supplier Response Wizard

1. Navigate to www.gcommerce.gov.za in your browser. The Government Procurement Portal landing page will be displayed as illustrated in Figure 1 .

NOTE

It is recommended that you use Google Chrome browser when accessing the gCommerce portal.

Figure -
1 gGovernment Procurement Portal landing page



2. Click on the gCommerce icon. The gCommerce landing page will be displayed as in Figure 2.

Figure 2 - gCommerce landing page

3. Click on the Supplier button. The gCommerce Login screen will be displayed as in Figure 3.

RESTRICTED

Figure 3- gCommerce Login screen

4. Enter your user name, user code and password and click on the Logon button. The gCommerce portal will open as shown in Figure 4.

Figure 4 - gCommerce portal

5. Click on the Response Wizard icon. The Response Wizard screen will be displayed as shown in Figure 5.

4. Response Wizard screen layout and components

The layout and components of the Response Wizard screen is illustrated in Figure 5 below. Refer to Error! Reference source not found. for a description of the screen components.

Figure -

5 Response Wizard layout and components

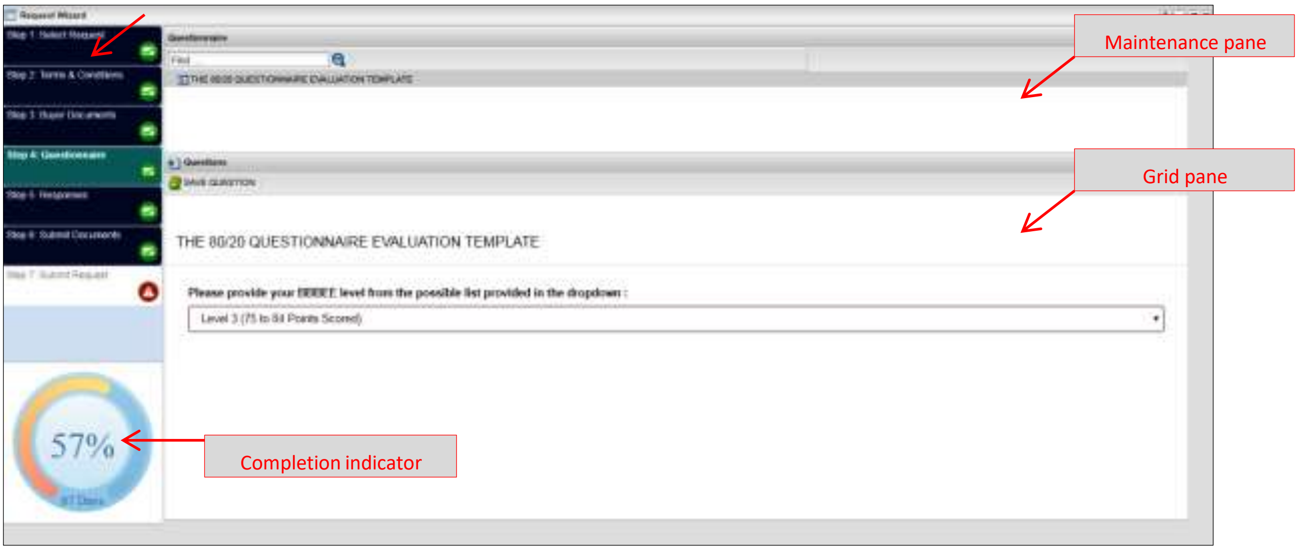
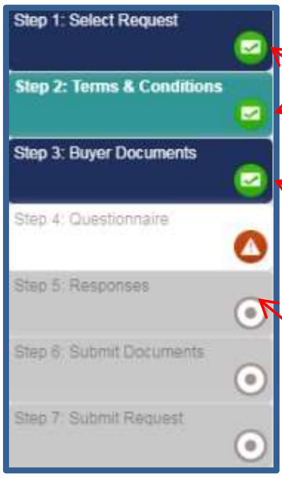


Table 2 - Response Wizard screen components

Component	Description
Maintenance pane	The maintenance pane is located on the right of the screen and displays the current step in the bid process as you progress. This pane displays available bid information as well as forms and fields you are required to complete in response to the bid.
Grid pane	The grid pane displays fields for information input and recording.
Navigation pane 	The navigation pane on the left of the screen lists the steps to be completed: - The current step is highlighted in green with a green-and-white check icon. Clicking on the next step tab will change the colour of the current step to green, and the completed step to blue. - When you supplied all the compulsory information, the next steps become available. This is indicated by a red exclamation icon. However, when you get to step 3, the icon will become green immediately. The reason is that step 3 provides the standard bidding documents applicable to the current request for download and does not require any critical action from the bidder. Steps that are greyed out are not yet available.
Completion indicator	The completion Indicator displays the completion status of the bid to which you are responding. The percentage complete will increase as each step is completed.

Chapter 2- Responding to RFXs

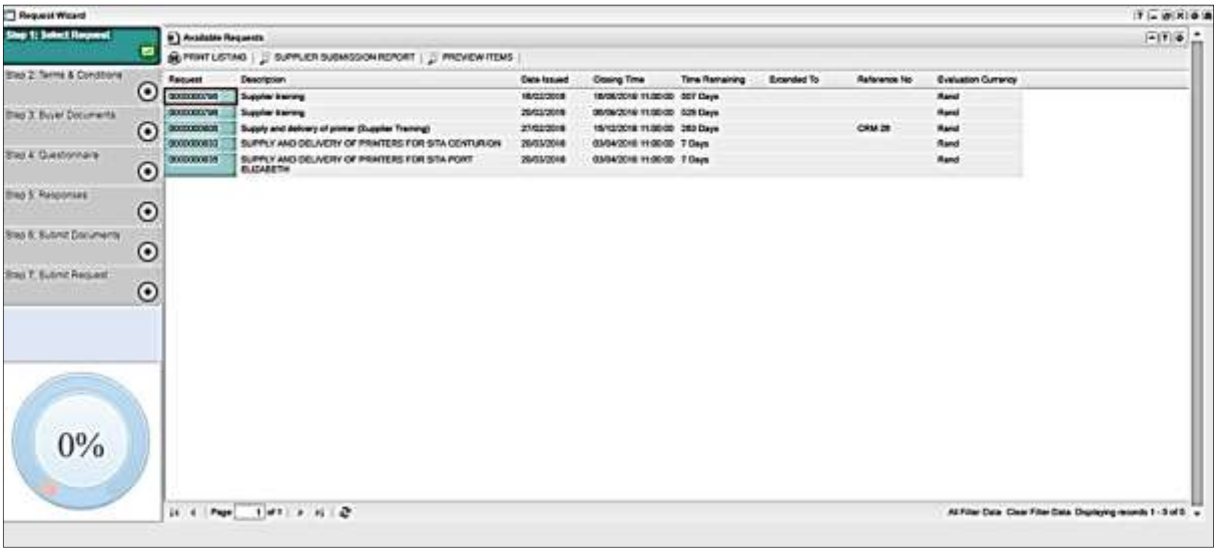
1. Step 1: Select request

Follow the process indicated below to complete Step 1: Select Request.

Figure -

1. Click on the relevant request in the Available Requests list as shown in Figure 6.

Figure 6 – Select request



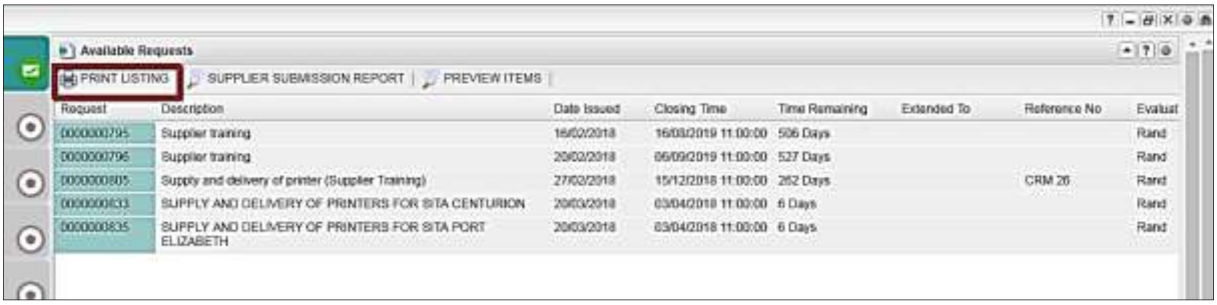
NOTE

The percentage complete indicator is at 0%.

The following additional functionality is available on the Step 5: Responses tab.

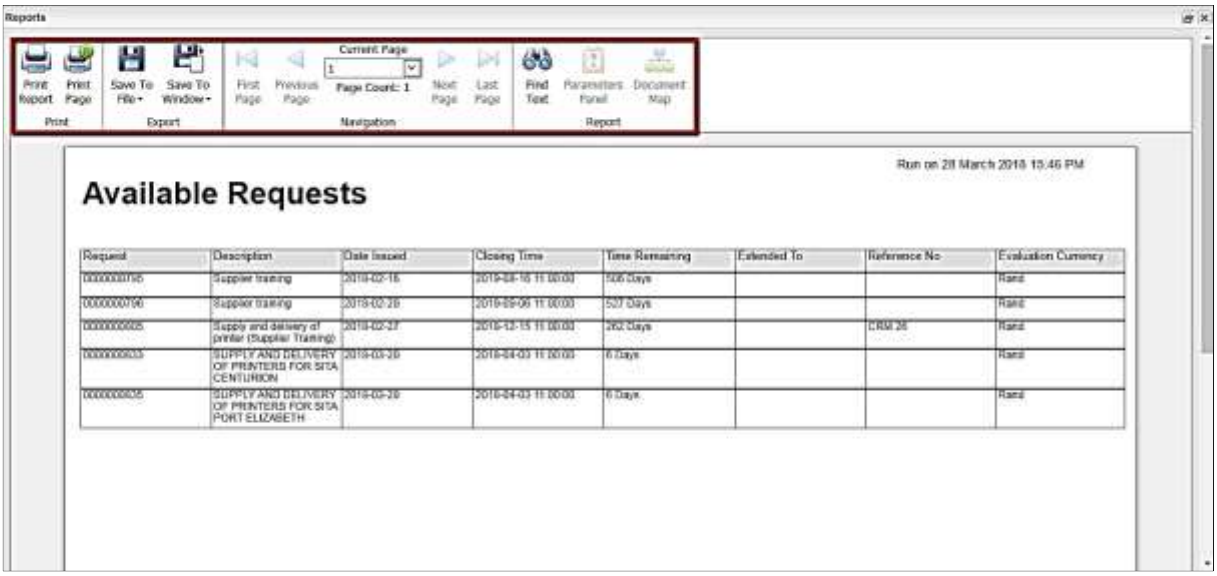
1.1 Print listing

1. Click on the Print Listing button on the Available Requests screen as shown in Figure 7. 7 Print Listing button



A list of all available requests will be displayed in the Reports screen. You have options to save and/or print the document and also to find specific text in the document, as shown in Figure 8. You can also save the list to a different file format, e.g. Excel or CSV, using the Save To File button.

Figure 8 - Print Listing report



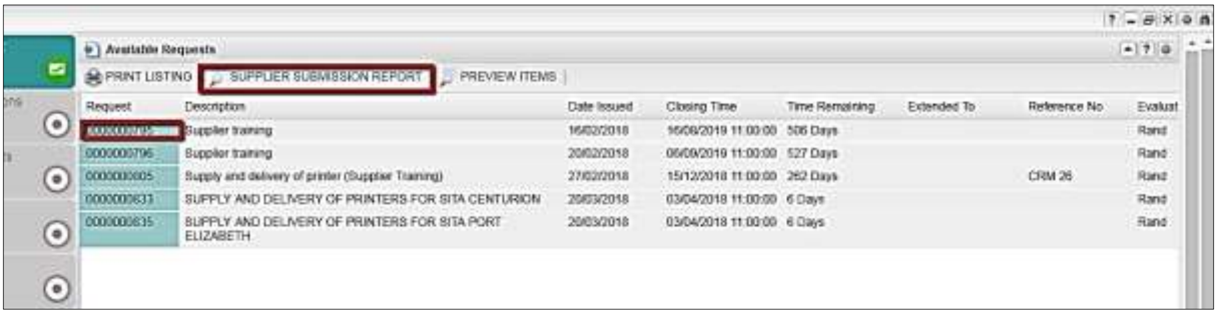

NOTE

The Print Listing functionality is available throughout the entire Supplier Response Wizard process and can be used during any of the steps to generate a list of available requests.

1.2 Supplier submission report

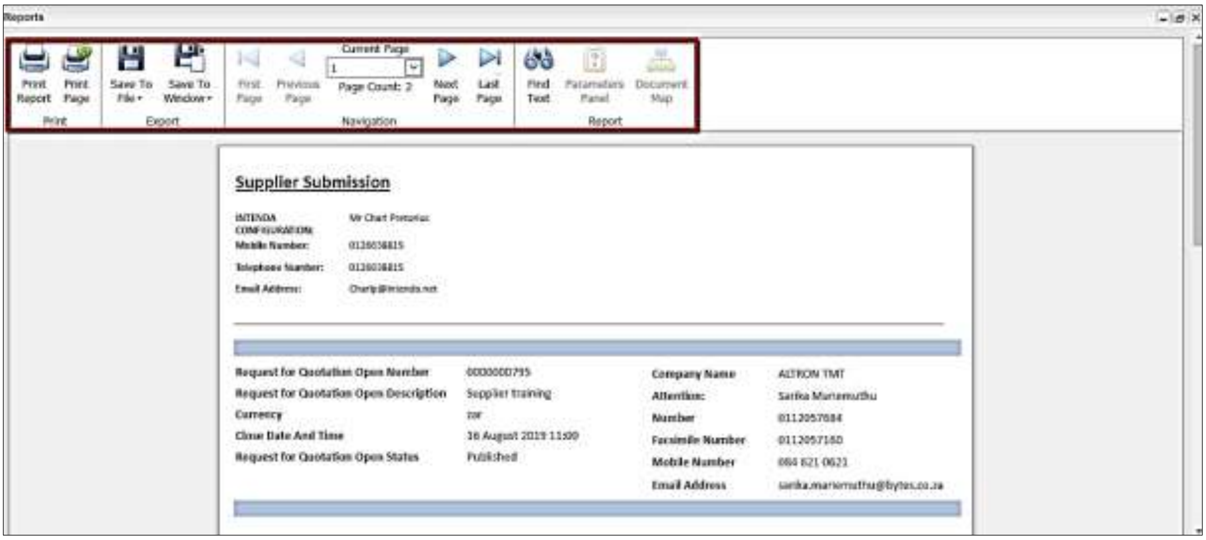
1. Select the applicable request.
2. Click on the Supplier Submission Report button as shown in Figure 9.

Figure
9 - Supplier Submission Report button



A report detailing your response to the current request will be displayed in the Reports screen. You have options to save and/or print the document and also to find specific text in the document, as shown in Figure 10.

Figure 10 - Supplier Submission report



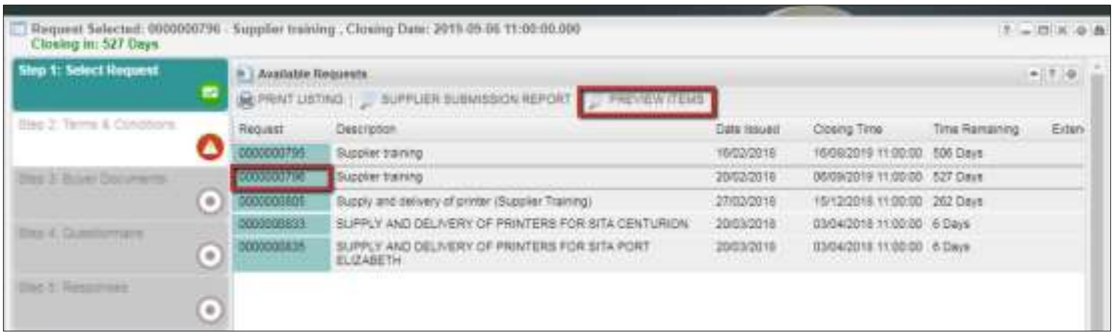
NOTE

The SUPPLIER SUBMISSION report will usually be generated after completion of Step 7: Submit Request. However, you can also generate this report when you need to verify or review your response to a bid. It is advisable that you save the report for your records.

1.3 Preview items

1. Click to select a request and click on the Preview Items button as shown in Figure 11.

11 - Preview Items button



The Preview Items on Request screen is shown, providing details on the individual items in the request as shown in Figure 12.

Figure 12 - Preview Items on Request screen

2. Step 2: Terms and conditions

Follow the process indicated below to complete Step 2: Terms and Conditions.

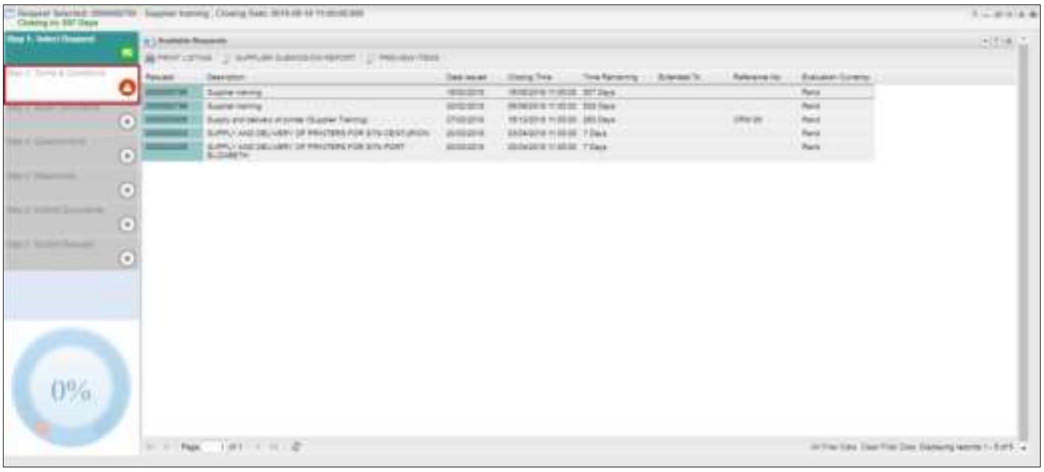
2.1 Accept the terms and conditions


NOTE

The terms and conditions referred to in this step are applicable to the online bidding process and not to the RFX.

1. Click on the Step 2: Terms & Conditions tab in the navigation pane as shown in Figure 13.

Figure 13 - Step 2: Terms & Conditions



Figure

2. The terms and conditions will be displayed in a PDF document. Read the terms and conditions. Click on the Accept Terms and Conditions button to accept.

3. Click on the Yes button in the Continue confirmation message

4. Click on the OK button in the Action Performed Successful confirmation message.

NOTE

If you click on the Reject Terms and Conditions button you will not be able to respond to the bid.

3. Step 3: Buyer documents

Follow the process indicated below to complete Step 3: Buyer Documents.

3.1 View buyer documents

1. Click on Step 3: Buyers Documents tab in the navigation pane as shown in Figure 14.

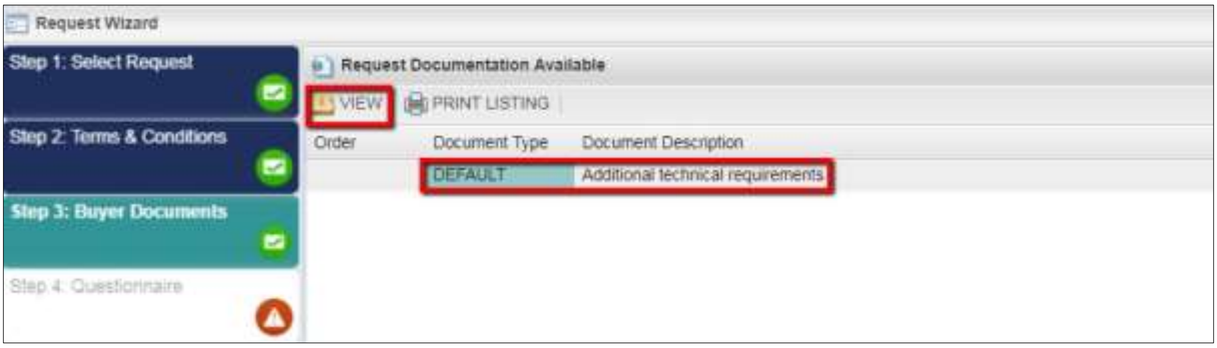
Figure 14 - Step 3: View Buyer Documents

NOTE

The percentage complete indicator has changed to reflect your progress.

2. A list of relevant buyer documents will be displayed in the Request Documentation Available screen. Click to select the document to be viewed then click on the View button as shown in Figure 15.

    15 - View button



3. The selected document will download to your computer. Click on the MS Word icon to open the document.

NOTE

The standard bidding documents must be signed and uploaded when you are completing Step 6: Submit Documents.

3.2 Print buyer document listing

This function allows you to generate a list of all the buyer documents attached to the current request.

1. Click on the Print Listing button on the Request Documentation Available screen as shown in Figure 16 below.

Figure 16 - Print Listing button

All the buyers’ documents relevant to the current request will be listed in the Request Documents Available Report screen with options to save and/or print the document and also to find specific text in the document.

4. Step 4: Questionnaire

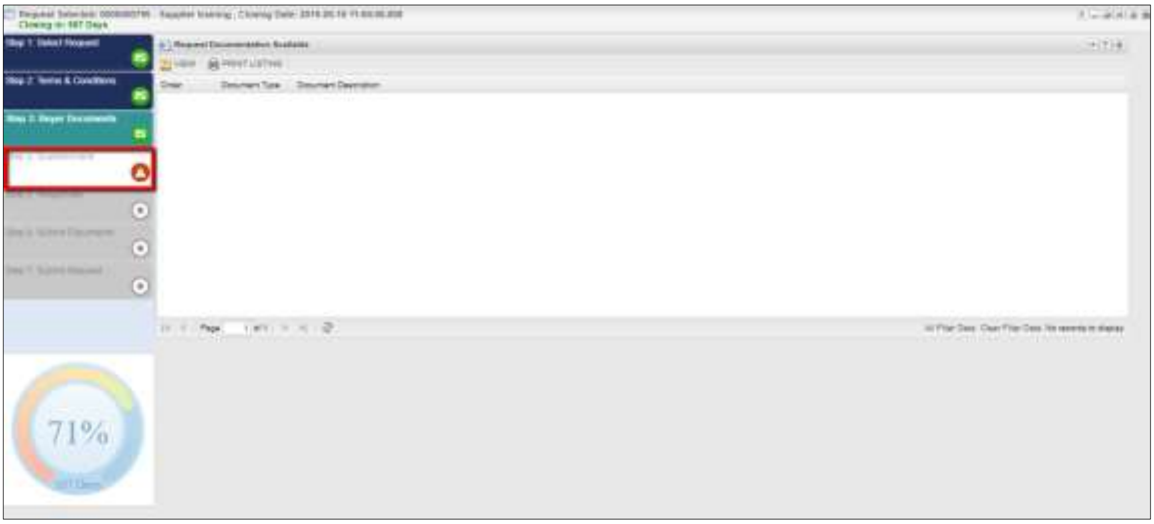
Follow the process indicated below to complete Step 4: Questionnaire.

4.1 Complete questionnaire

This step requires the completion of compulsory questions.

1. Click on the Step 4: Questionnaire tab in the navigation pane as shown in Figure 17.

Figure
Figure 17 - Step 4: Questionnaire

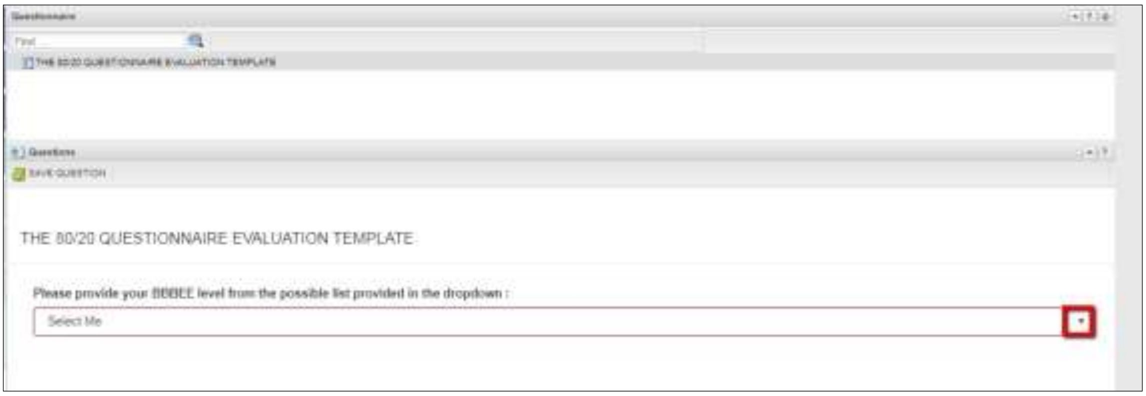


2. A list of the questionnaires that are compulsory for the current request is shown. Click to select the questionnaire to be completed as shown in Figure 18.

Figure 18 - Questionnaires

3. The questions to be answered will be displayed in the grid pane below the questionnaire. Click on the drop-down arrow below the question to see the response options as shown in Figure 19.

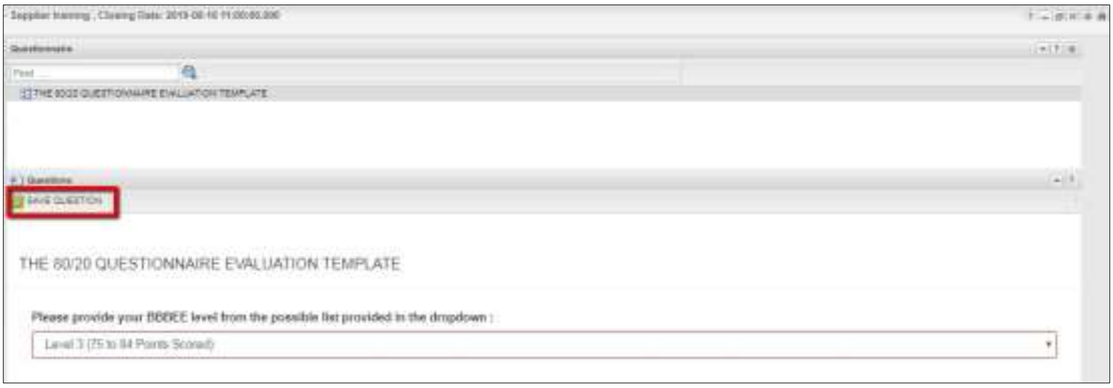
Figure 19 - Question drop-down arrow


THE 80/20 QUESTIONNAIRE EVALUATION TEMPLATE
Please provide your BBBEE level from the possible list provided in the dropdown :
Select Me

4. Select the applicable response.

5. Click on the Save Question button to save your response as shown in Figure 20.

Figure 20 - Save Question



6. Click on the OK button in the Save Successful confirmation message.

5. Step 5: Responses

Follow the process indicated below to complete Step 5: Responses.


NOTE

Your responses can be completed online, or offline by downloading the Response template to your computer. Both processes are explained here, starting with completing the response online.

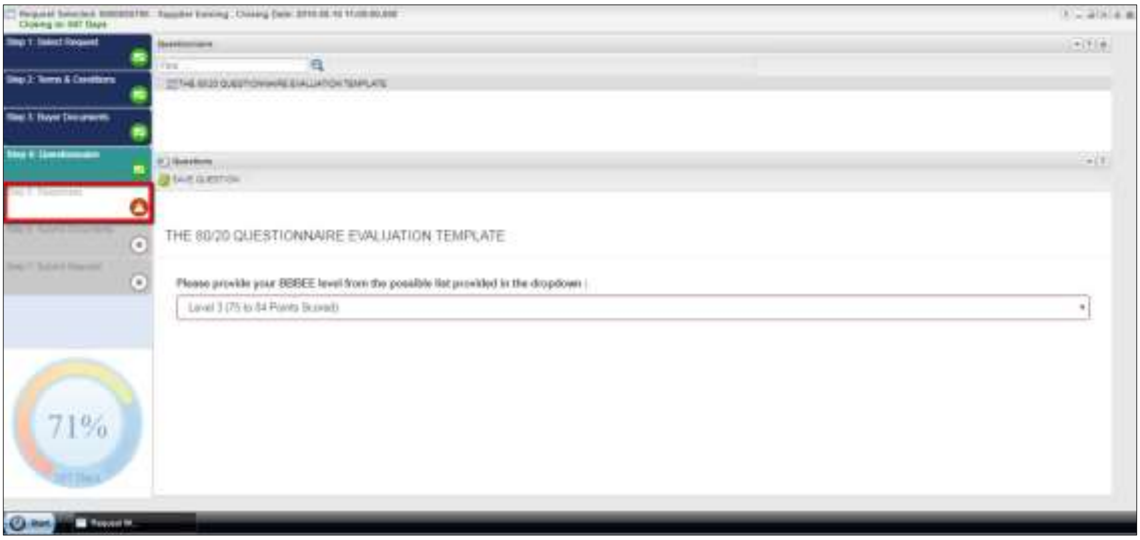
5.1 Complete response online

This step requires the completion of compulsory questions.

1. Click on the Step 5: Response tab in the navigation pane as shown in Figure 21.

Figure 21 - Step 4: Questionnaire

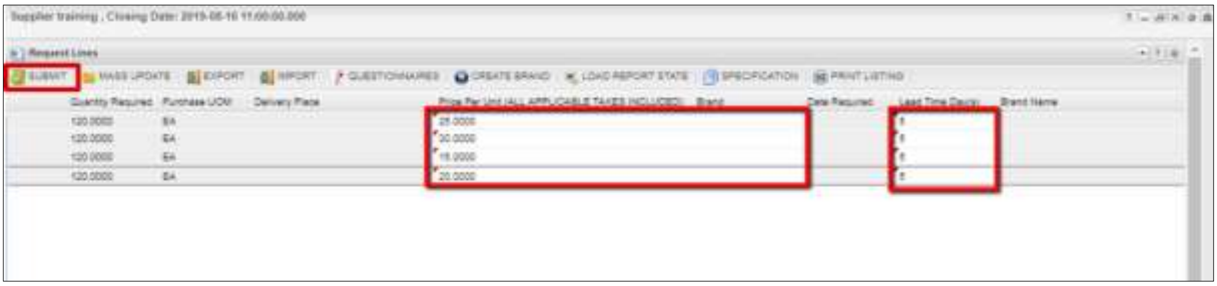
Figure -



2. The Request Lines screen shows the line items of the current request. Complete the request line fields with the required information. Please refer to table 3 (page 26) for a description of the line fields.

3. Click on the Submit button to submit your responses as shown in Figure 22.

Figure 22 - Submit Response



5.2 Complete response offline

1. Click on the Step 5: Responses tab in the navigation pane.

2. Click on the Export button as shown in Figure 23.

Figure 23 - Export button

3. The Response template will download to your computer in MS-Excel format. Click on the Excel document icon to open as shown in Figure 24.

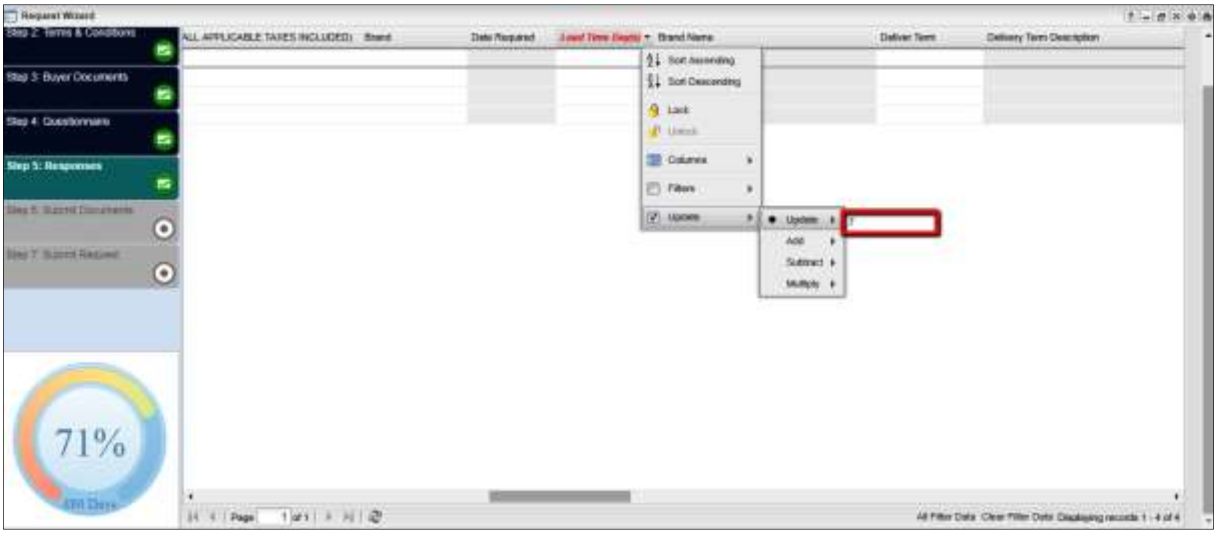
The following additional functionality is available on the Step 5: Responses tab.

5.3 Mass update

This function is used to capture the same response value for multiple items in the same column on the Request Lines screen.

1. Click on the drop-down arrow next to the item to be updated.
2. Navigate to the Update option to show the Value field.
3. Click on the Value field and enter the update value as shown in Figure 27.

27 Request line item options



4. Click on the Mass Update button.
5. Click on the Yes button in the Continue dialog box.
6. Click on the OK button in the Save Successful confirmation message. The updated values will be shown in the relevant column.

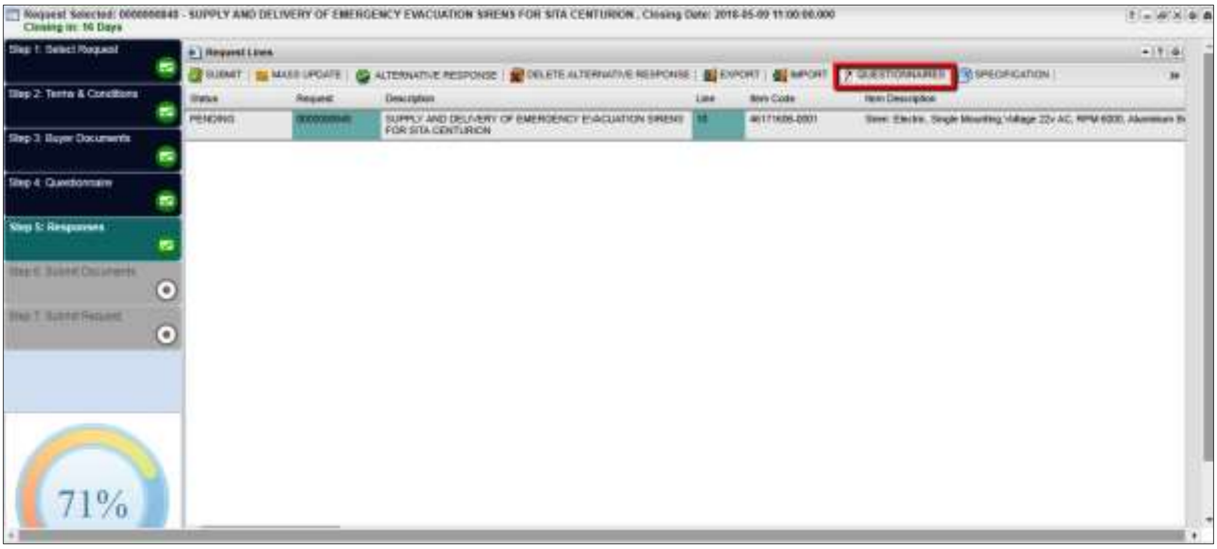
5.4 Complete line-level questionnaires

The Questionnaires function allows the supplier to capture answers to a line item questionnaire linked to one or more items on an RFX. The same questionnaire may be linked to selected lines or to all the lines on an RFX. Similarly, a different questionnaire may be linked to each line.

1. Click to select a line item and click on the Questionnaires button to verify whether a questionnaire is attached, as shown in Figure 28.

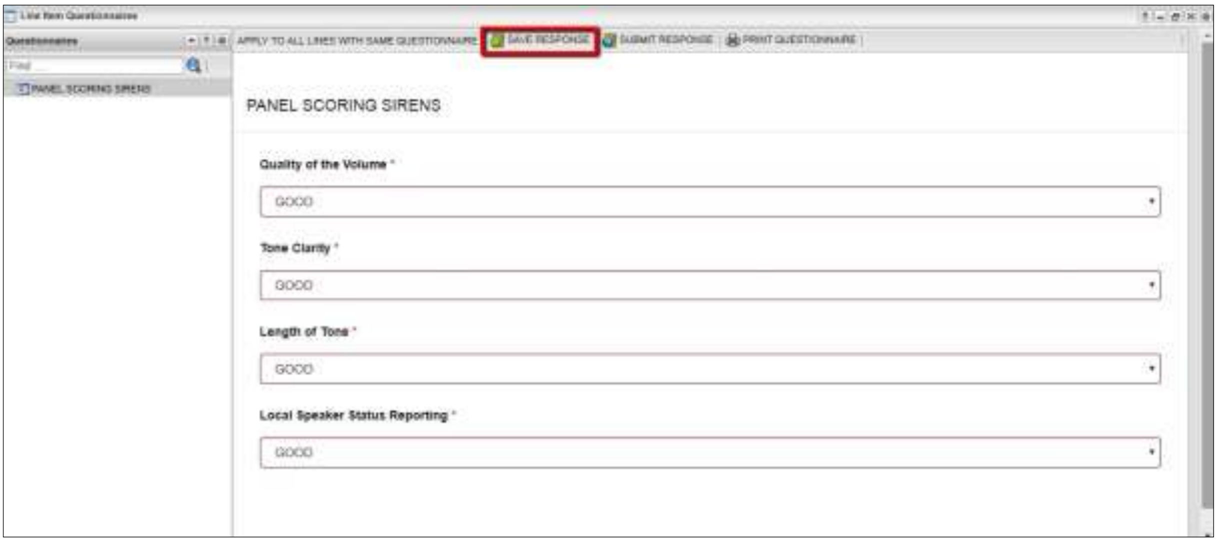
Figure -

Figure 28 - Questionnaire button



2. A list of the questionnaires will be displayed in the Line Item Questionnaires screen. Select a questionnaire to display the questions to be answered.
3. Complete the questions by selecting the correct options from the drop-down options.
4. Click the Save Response button as shown in Figure 29.

Figure 29 - Save Response button

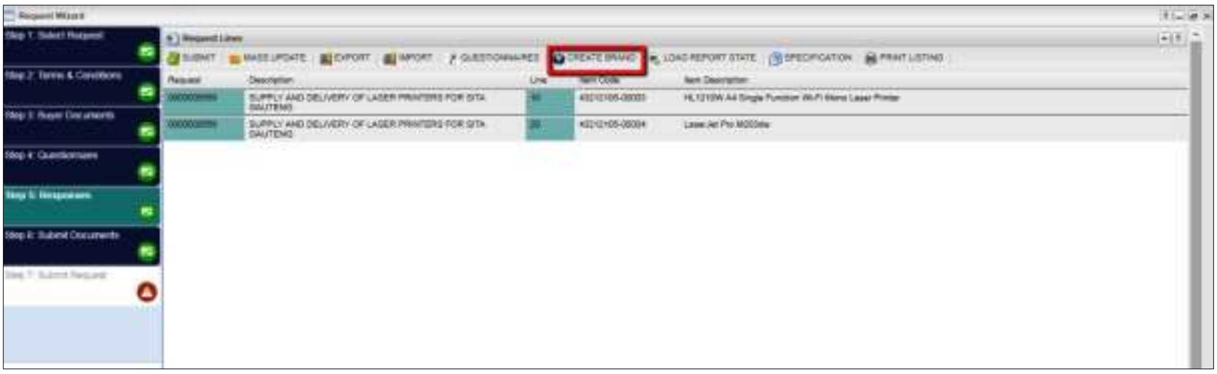


5.5 Create a brand

You may select a brand associated with the provided response. If a brand is not available on the option list in the Brand column, you may add a new brand.

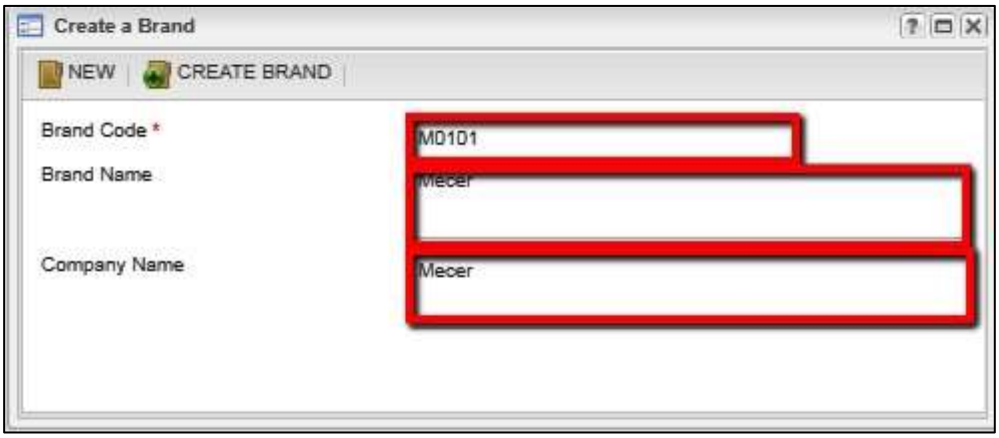
1. Click on the Create brand button on the Request Lines screen as shown in Figure 30.

Figure 30 - Create Brand button



2. Complete the brand details fields on the Create a Brand screen as shown in Figure 31.

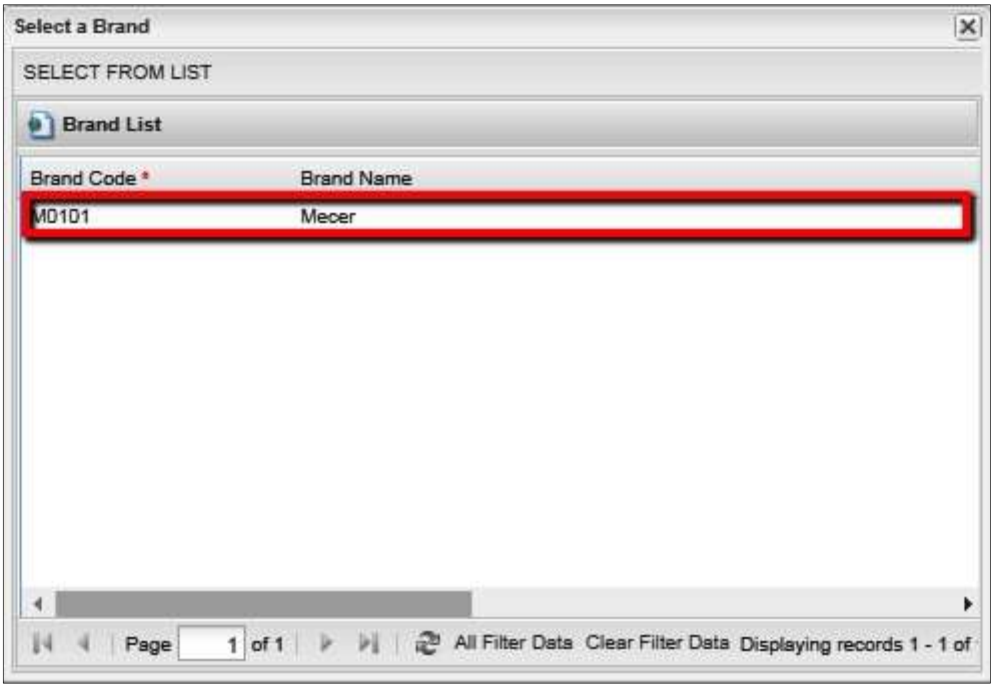
31 Create Brand screen



3. Click on the Create Brand button.
4. Click on the OK button in the Success confirmation message.
5. Click on the drop-down arrow in the Brand column heading to show the Select a Brand screen.
6. Select the desired brand from the Brand List screen as shown in Figure 32.

Figure 32 -Select a Brand screen

Figure -



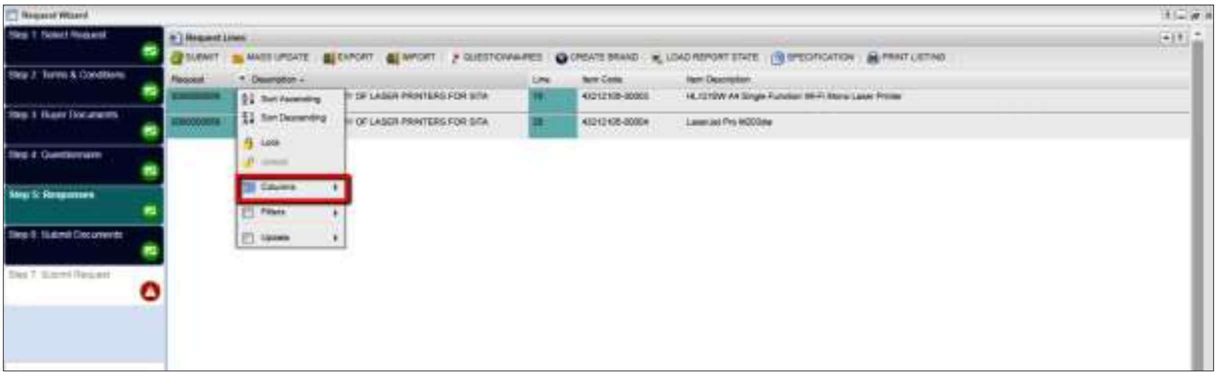
5.6 Load report state

This function allows you to customise the Response grid to display selected fields.

1. Click on the drop-down arrow next to any Item column heading.

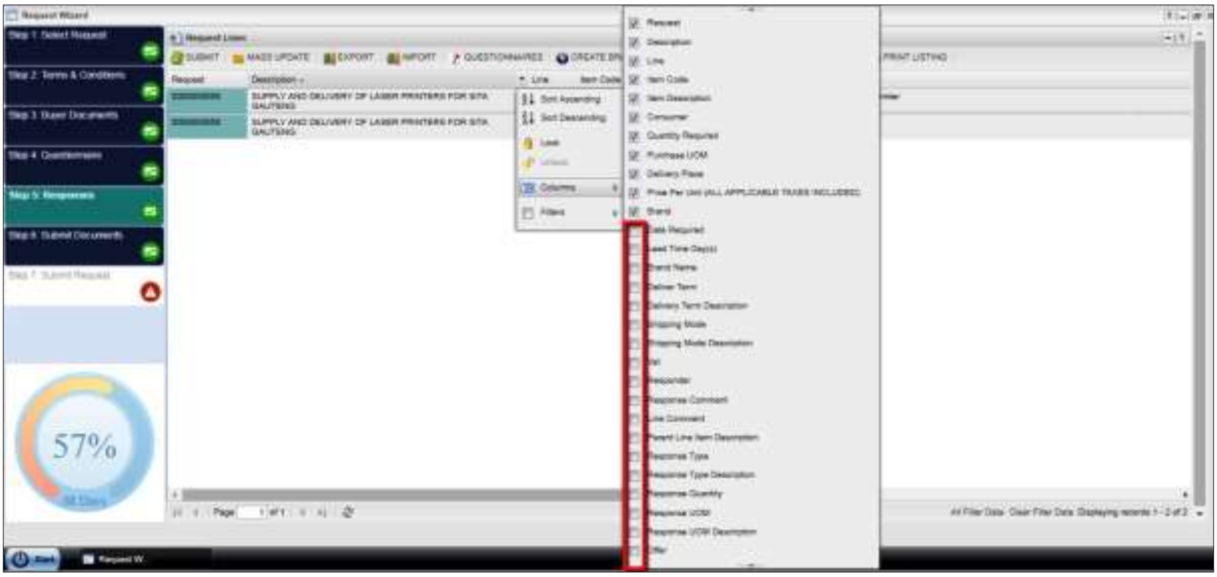
2. Navigate to the Columns option to show the list of all column headings as shown in Figure 33.

Figure 33 - Column drop-down options



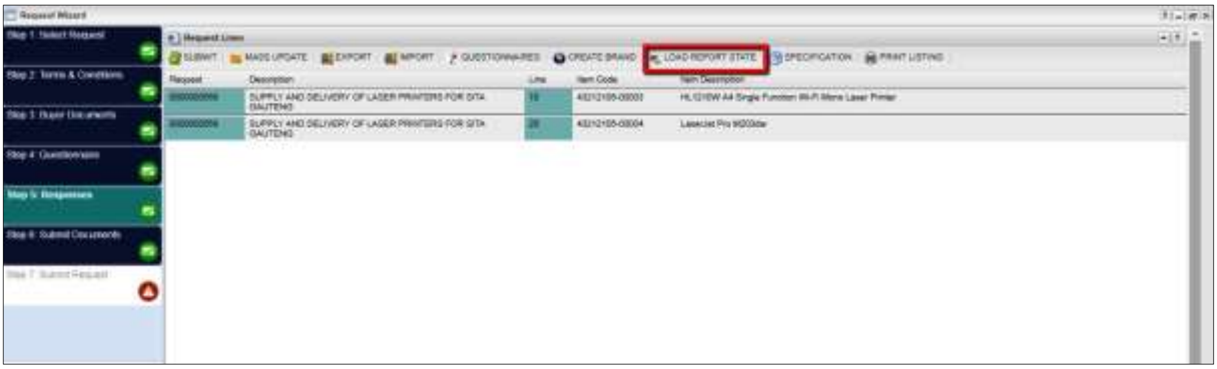
3. Deselect the columns you do not want to include in your customised report state as shown in Figure 34.

Figure 34 - Deselect item column headings



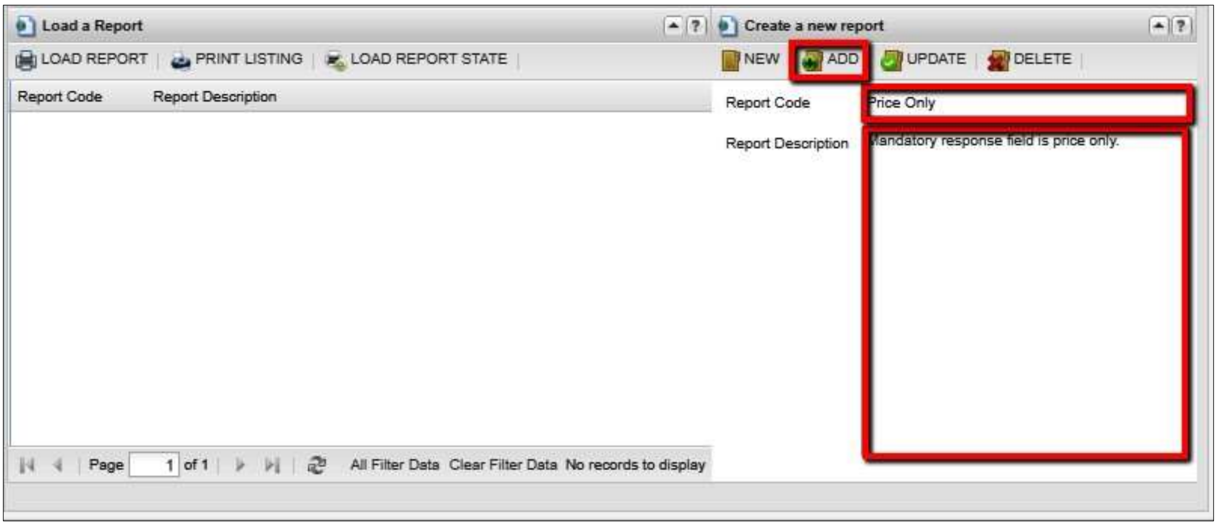
4. Click on the Load Report State button as shown in Figure 35.

Figure 35 - Load Report State button



5. Complete the report details fields in the Create a new report screen and click on the Add button as shown in Figure 36.

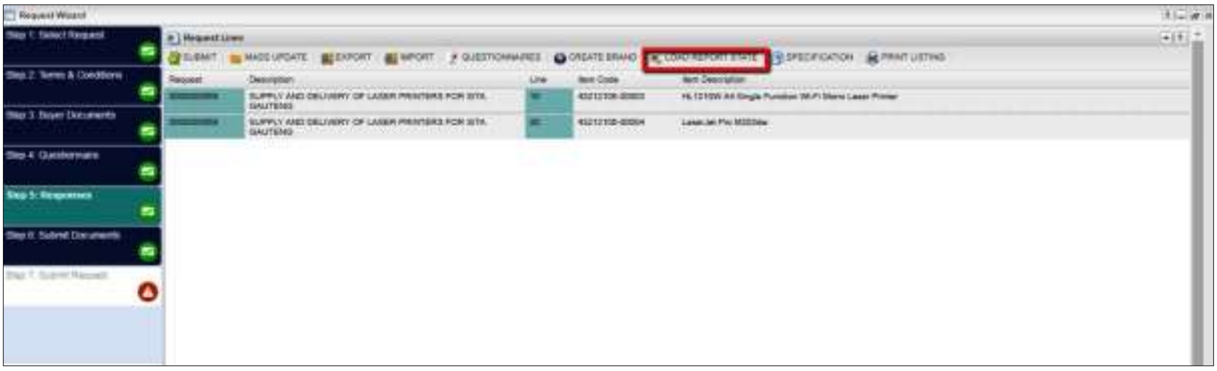
Figure 36 - Load a Report Screen



6. Click on the OK button in the Success confirmation message.

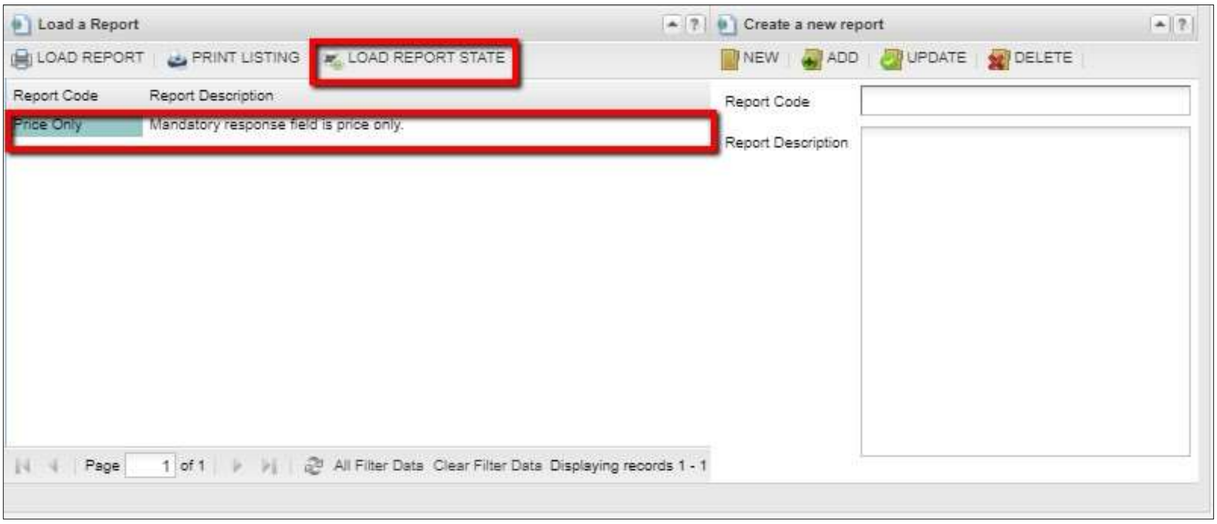
7. Click on the Load Report State button on the Report Lines screen as shown in Figure 37.

Figure 37 - Load Report State button



8. Select the relevant report state from the Load a Report screen and click on the Load Report State button to load the selected report state as shown in Figure 38.

Figure 38 - Load a Report screen



5.7 Specification

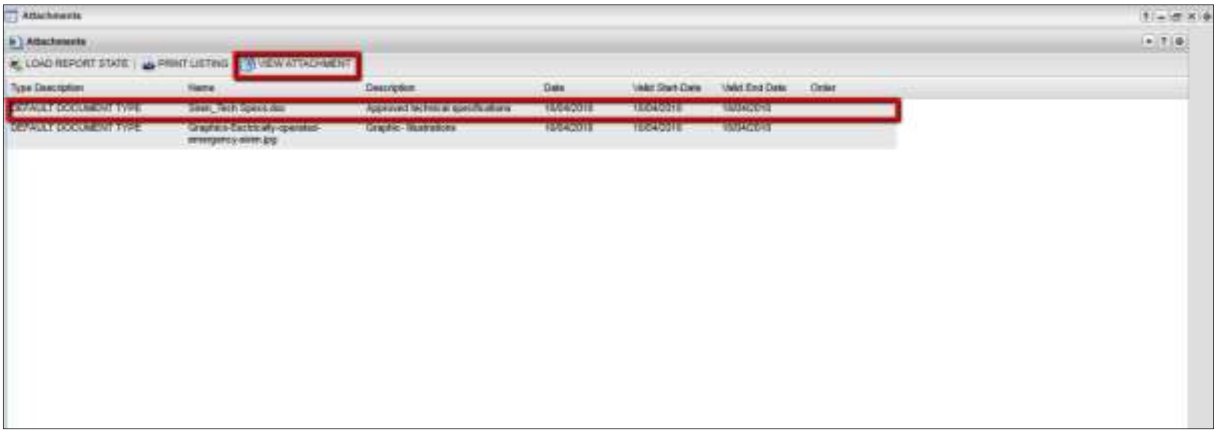
This function allows you to download a line item specification if the line item has an item specification.

1. Click on the Specification button in the Report Lines screen as shown in Figure 39.

Figure 39 - Specification button

2. Select the relevant attachment from the Attachments screen and click on the View Attachment button as shown in Figure 40.

Figure 40 - Attachments screen



3. The specification will download to your computer in document format. Click on the Document icon to open as shown in Figure 41 .

Figure 41 - Open Attachment

6. Step 6: Submit documents

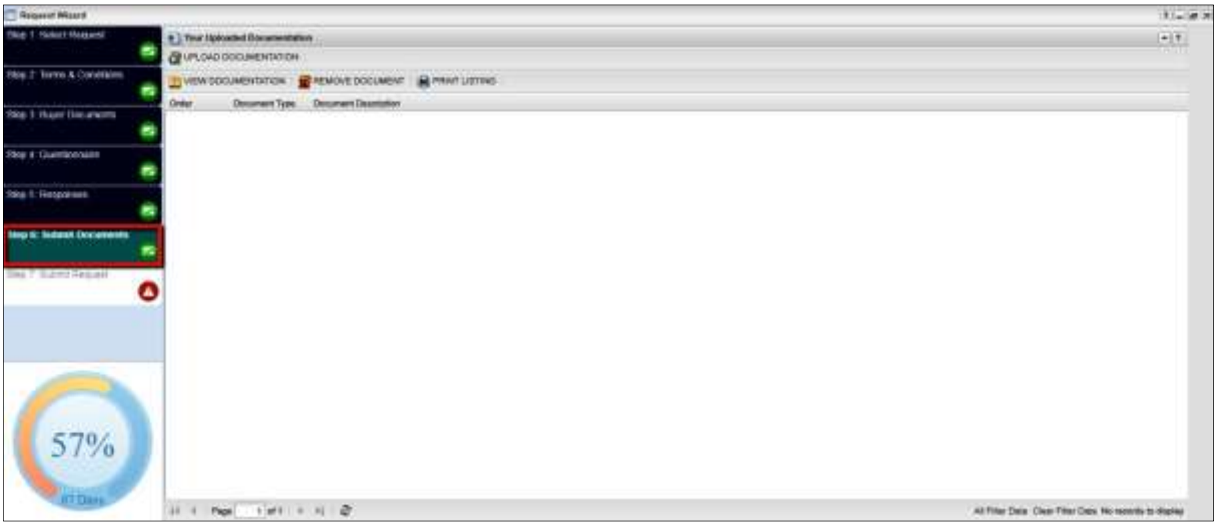
Follow the process indicated below to complete Step 6: Submit Document.

6.1 Submit documents

Any additional/required documents that must accompany your response must be uploaded at this step.

1. Click on the Step 6: Submit Documents tab in the navigation pane as shown in Figure 42.

Figure 42 - Step 7: Submit Documents

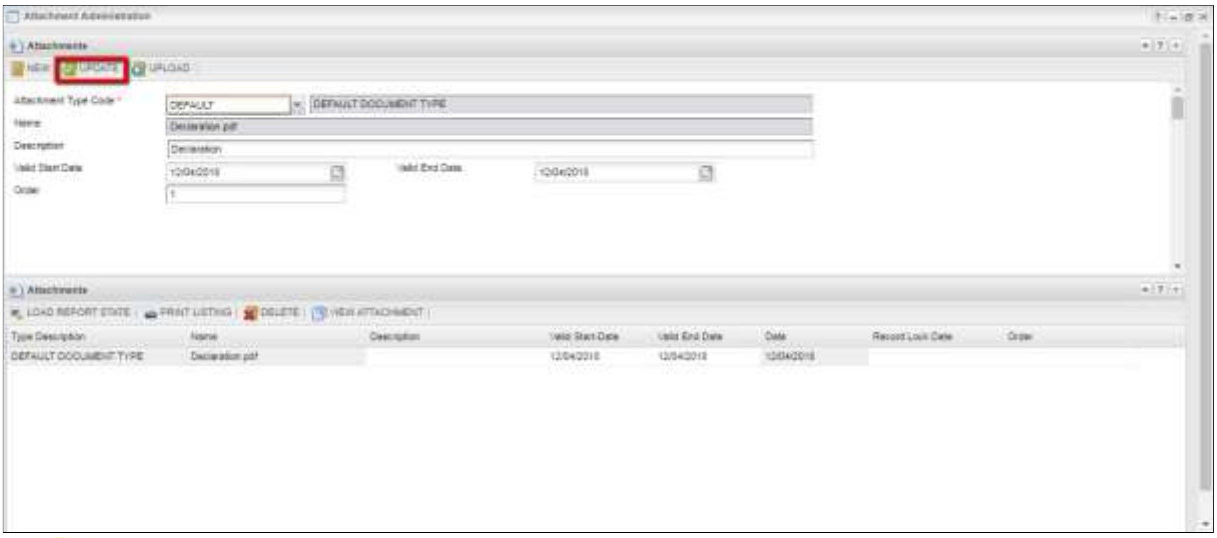


2. Click on the Upload Document button on the Your Uploaded Documentation screen as shown in Figure 43.

Figure 43 - Upload Documentation button

3. Click on the Upload button on the Attachment Administration screen.
4. Click on the Browse button on the Attachment dialog box.
5. Navigate to and select the file to be submitted.
6. Click on the Open button in the directory.
7. Click on the Save button in the Attachment dialog box.
8. Click on the OK button in the Save Successful dialog box.
9. Complete the content fields in the Attachment Administration screen and click on the Update button as shown in Figure 44.

Figure 44 - Update button



NOTE

To upload another document, click on the NEW button and repeat steps 1 to 9. If you upload multiple documents, you can change the document order if required by entering a desired document number in the Order field.

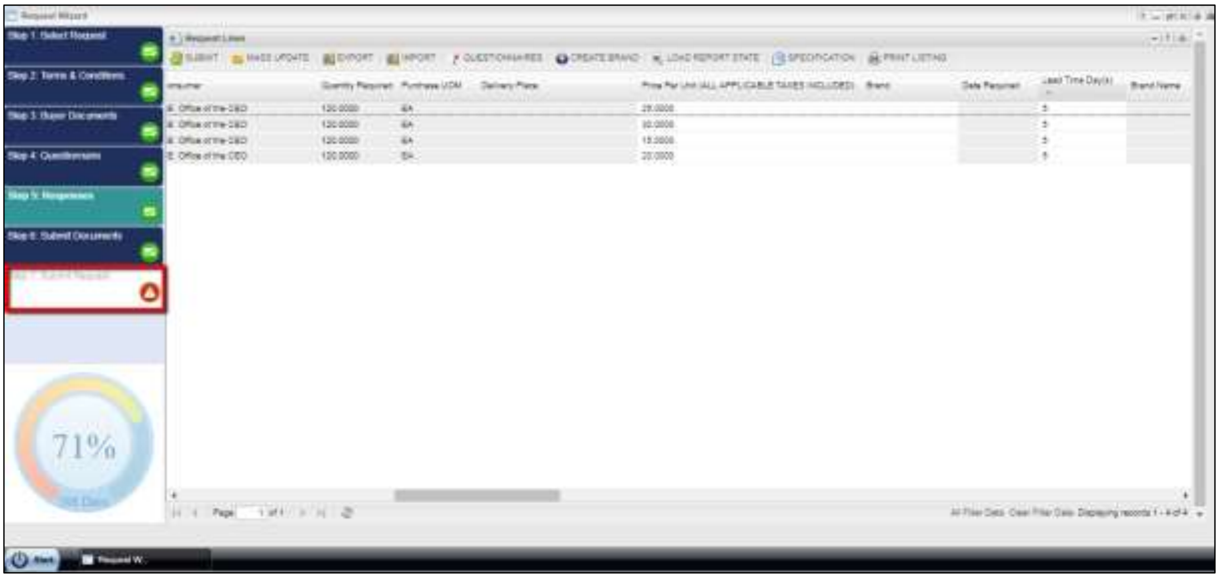
10. Close the Attachment Administration screen to return to the Upload documentation screen, which will display the uploaded documents.

7. Step 7: Submit request

Follow the process indicated below to complete Step 7: Submit Request.

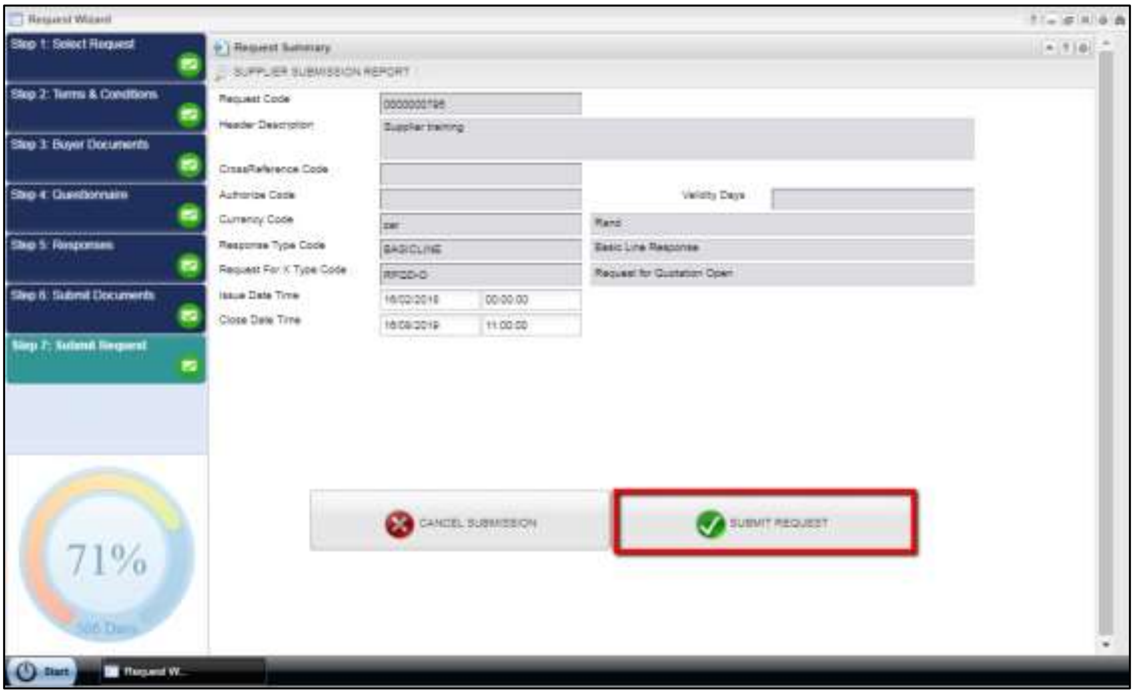
1. Click on the Step 7: Submit Request tab in the navigation pane as shown in Figure 45.

Figure 45 - Step 7: Submit Request



2. Click on the Submit Request button in the Request Summary screen as shown in Figure 46.

Figure 46 - Submit Request button

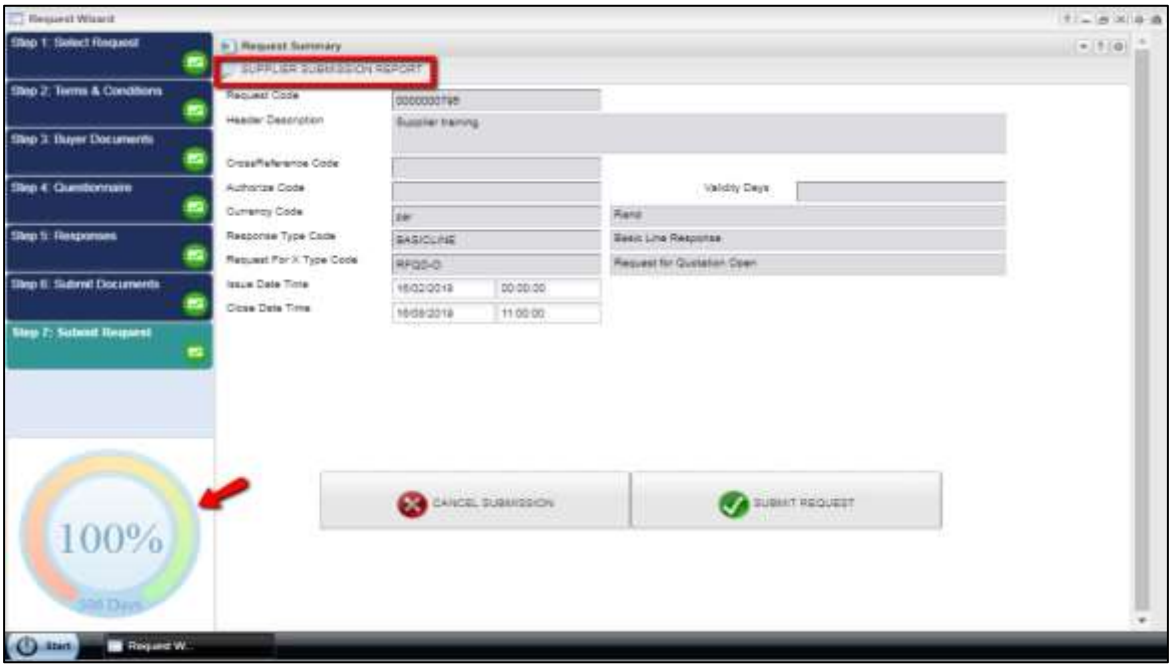


3. Click on the Yes button in the Continue dialog box.

4. Click on the OK button in the Responses Successfully Submitted dialog box.

5. Click on the Supplier Submission Report button to view your SUBMISSION report.

Figure 47 - Supplier Submission Report button

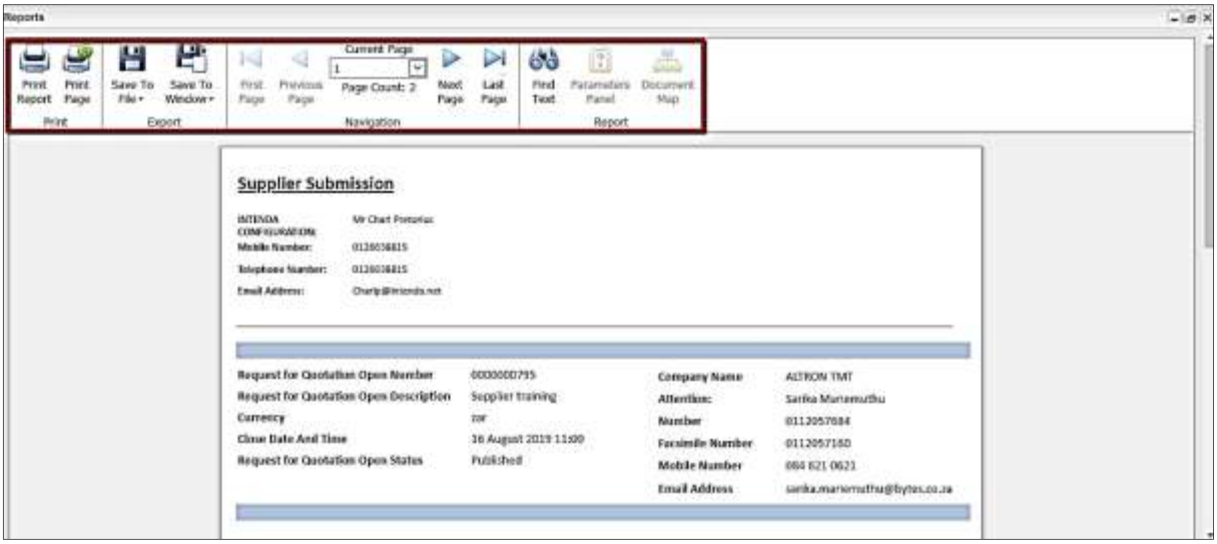


NOTE

The completion indicator has updated to 100%.

6. The SUPPLIER SUBMISSION report is shown in the Reports screen with options to save and/or print the document and also to find specific text in the document, as shown in Figure 48. Save the report for your records.

Figure 48 - Supplier Submission Report



NOTE

You can update your response multiple times before the closing date. Please ensure that you submit your latest changes by executing Step 7: Submit Request every time you update.