



# **CONFIDENTIAL**

## **e-Tendering System**

### **Buyers Guide**

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# e-Tendering

## 1.1 How to request a tender number

- Complete the e-tendering enquiry number and closing date booking form offered by the tender office.
- Submit the form to [tenderbookings@eskom.co.za](mailto:tenderbookings@eskom.co.za)

## 1.2 How to create the Audit report in OpenText

- Navigate to Audit Report (e-Tendering) folder
- Use the enquiry number to print the audit report to verify that there have been no changes to the documents during the transfer from Tender Office workspace to Formal Tender evaluations in Enterprise space in OpenText



Figure 1

- Access the Audit WebReport folder



Figure 2

- Use the tender number to run the report



Figure 3

## 1.3 How to upload Tenders on Tender Bulletin and other site

### 1.3.1 Login

- Enter your existing Elec username and password, then click on the “Login” button.



The login form features the Eskom logo at the top. Below it, there are two input fields: the first is labeled 'Mokoract' and the second is a password field with masked characters. A red 'Log in' button is positioned at the bottom of the form.

Figure 4

- If you have successfully logged in, then the Tender bulletin menu screen is displayed with the logged in user details, login time, role and log off button. The following menus on top: Home, add new Tenders and Help Manual are also available. On the content page section, the list of all the logged in buyer's active tenders will be displayed. The search window will be blank. Filter by status will default to “Active” and filter by user will default to “My Tenders.” If you have not loaded any tenders yet, or have no current active tenders, the list will be empty.

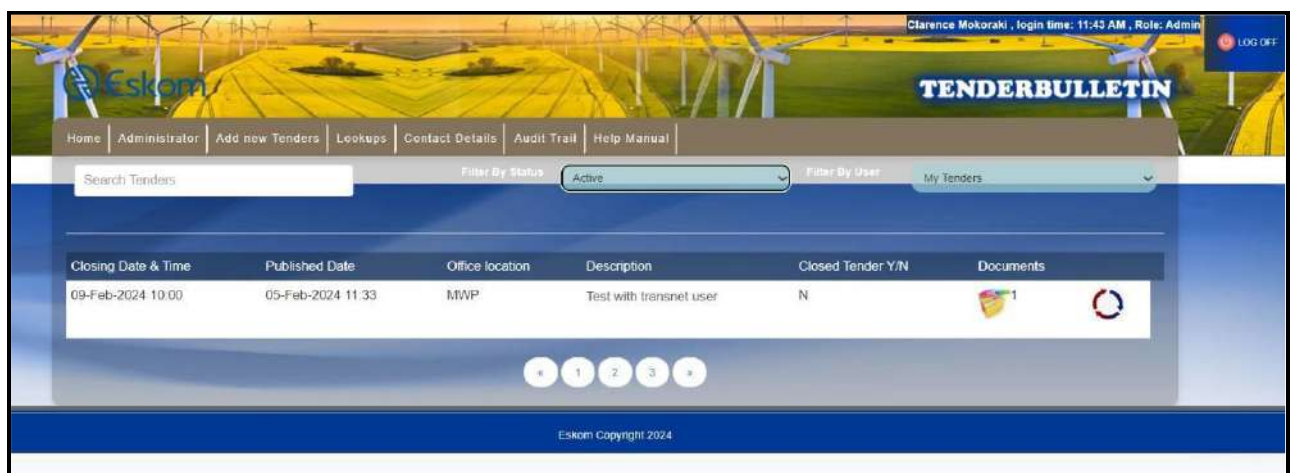


Figure 5

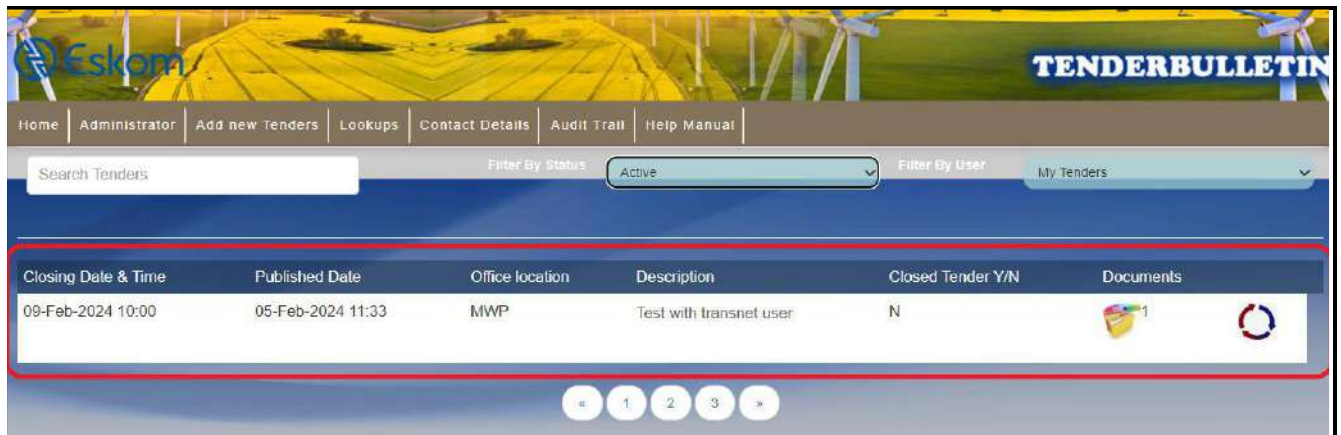









Figure 6

- The list of tenders will be having the headings: “Closing Date & Time”, which is the closing date and time information of the tender, “Office location”, “Description” which gives description information of the tender and “Documents”  which shows how many documents are attached to the tender. The last column will have three icons    if the tender is not published or one icon if the tender is already published. The unpublished tender’s icons are “Edit”  for editing the tender information/details, “Delete”  for deleting the tender and “Publish” for publishing the tender, thus making it visible to the public site visitors. The published tender’s icon  is only one and is for “Unpublishing” a tender, thus making it invisible to the public site visitors.

## 1.4 Managing Tenders

You can add new tenders, edit existing ones, delete tenders, restore deleted tenders, attach documents to tenders and publish or unpublish tenders. This can be done as follows:

### 1.4.1 Provision of Division with Sub Areas

- On the Add/Edit Tender page, the Division field has Sub Areas e.g., if Generation is selected, it will bring up the list of Power Stations.
- If the Distribution Division is selected, it will bring up the list of Clusters.

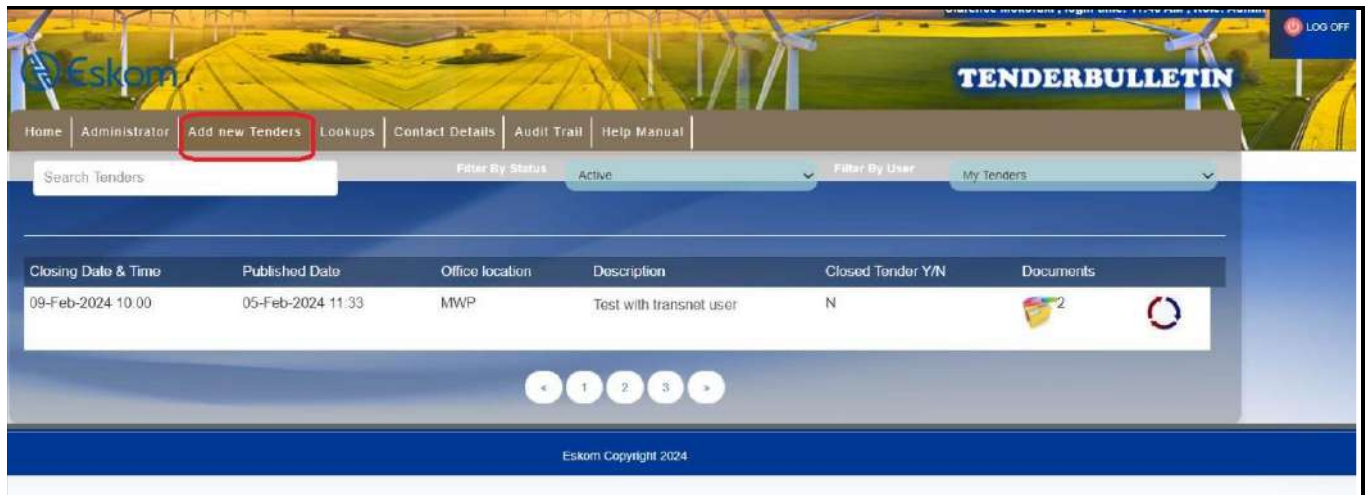


Figure 7

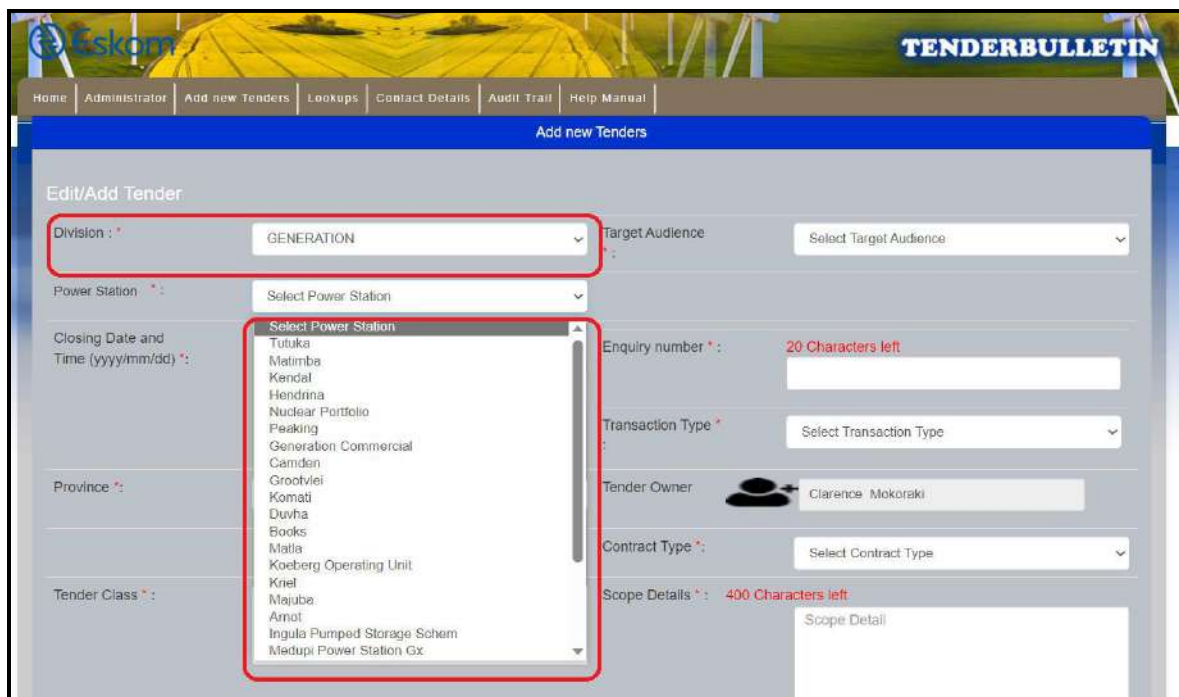
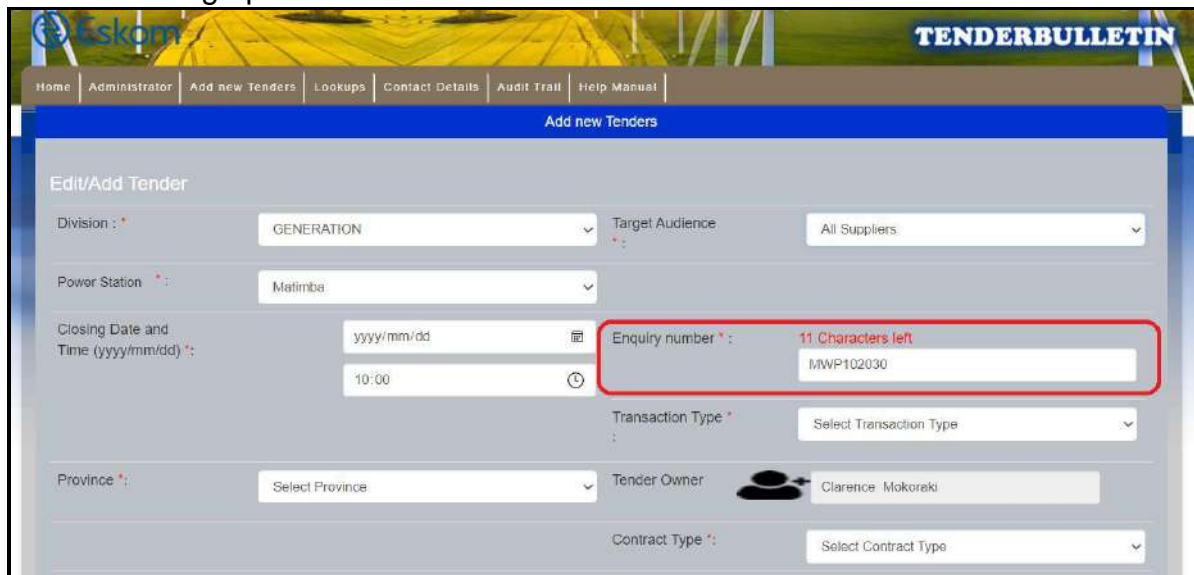


Figure 8



## 1.4.2 Reference Number field renamed to Enquiry Number

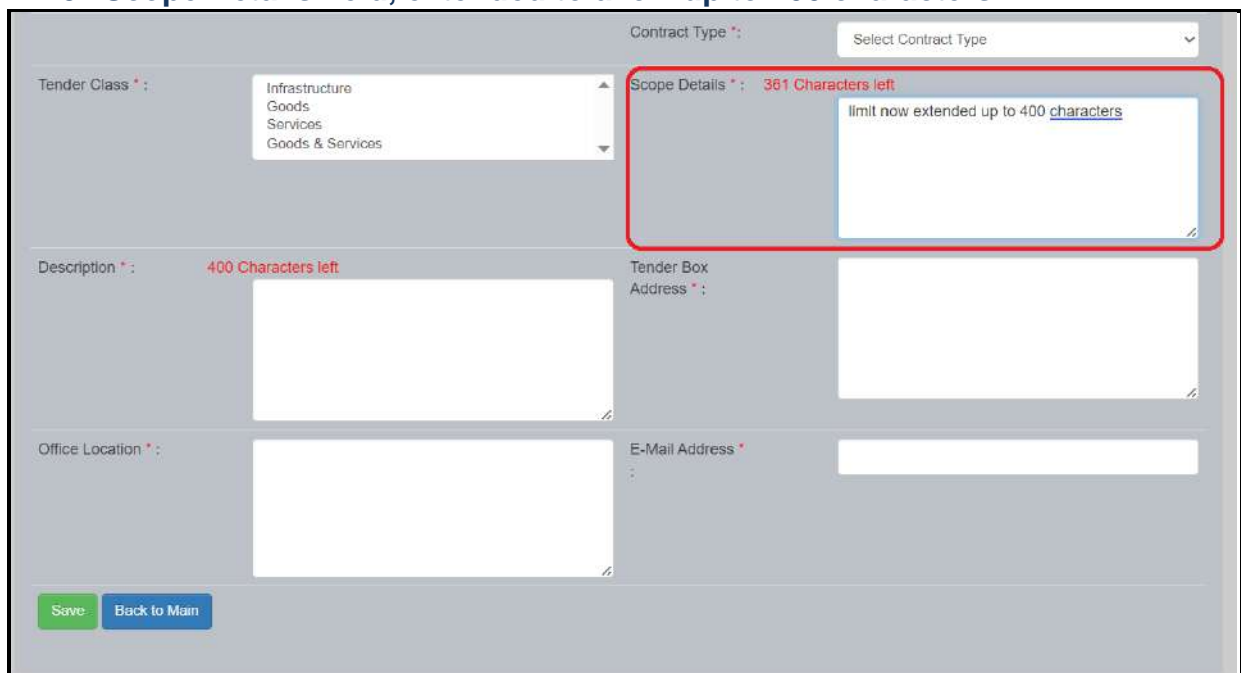
- Reference Number field has been renamed to Enquiry Number as highlighted below, allowing up to 20 characters.



The screenshot shows the 'Add new Tenders' form. The 'Enquiry number' field is highlighted with a red box. It displays '11 Characters left' and the value 'MWP102030'. Other fields include 'Division' (GENERATION), 'Power Station' (Matimba), 'Closing Date and Time' (yyyy/mm/dd, 10:00), 'Transaction Type' (Select Transaction Type), 'Province' (Select Province), 'Tender Owner' (Clarence Mokoraki), and 'Contract Type' (Select Contract Type).

Figure 9

## 1.4.3 Scope Details field, extended to allow up to 400 characters



The screenshot shows the 'Add new Tenders' form. The 'Scope Details' field is highlighted with a red box. It displays '361 Characters left' and the text 'limit now extended up to 400 characters'. Other fields include 'Tender Class' (Infrastructure, Goods, Services, Goods & Services), 'Description' (400 Characters left), 'Tender Box Address', 'Office Location', 'E-Mail Address', and 'Contract Type' (Select Contract Type). There are 'Save' and 'Back to Main' buttons at the bottom.

Figure 10

#### 1.4.4 Tender class area, items have been removed and refreshed to only 4 new items

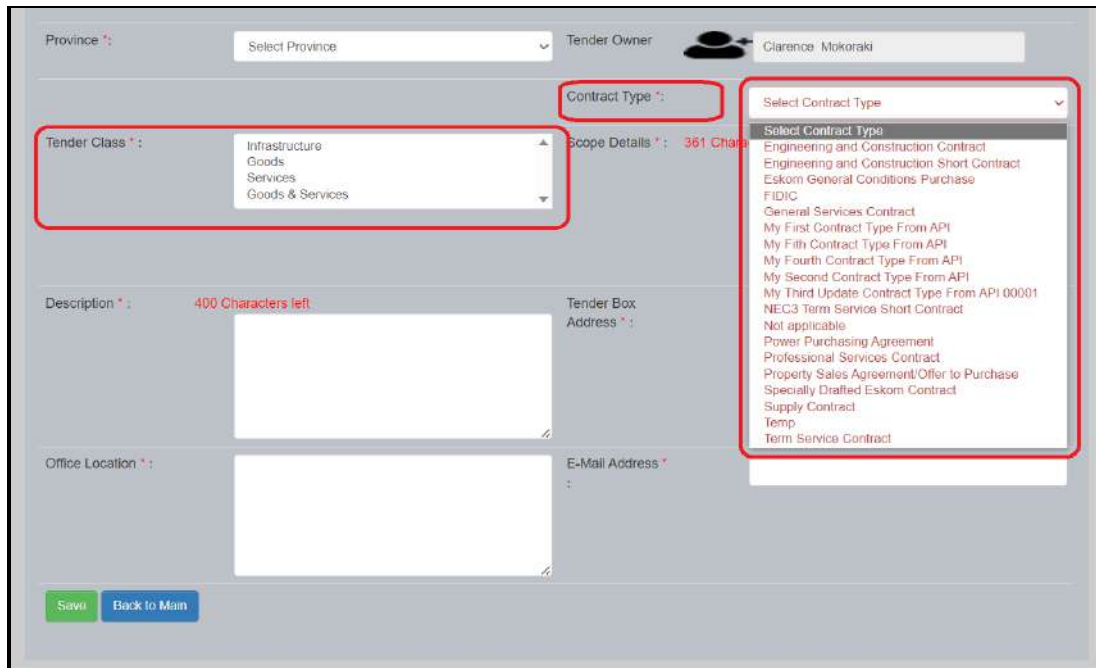


Figure 11

#### 1.4.5 Transaction Type is a new field with different options

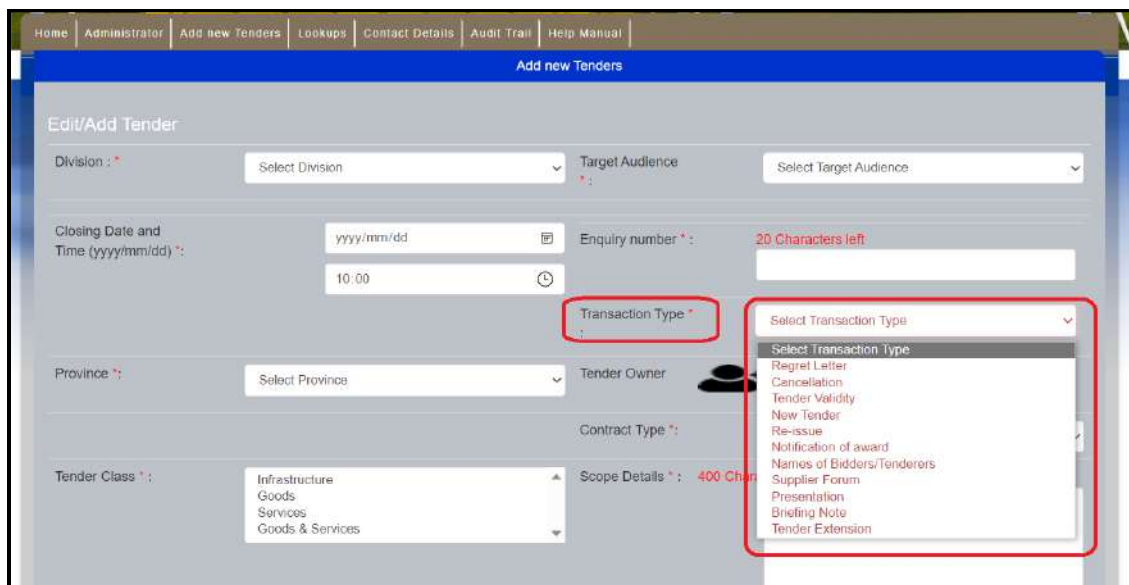


Figure 12



### 1.4.6 Published Date section, shows when a Tender was published

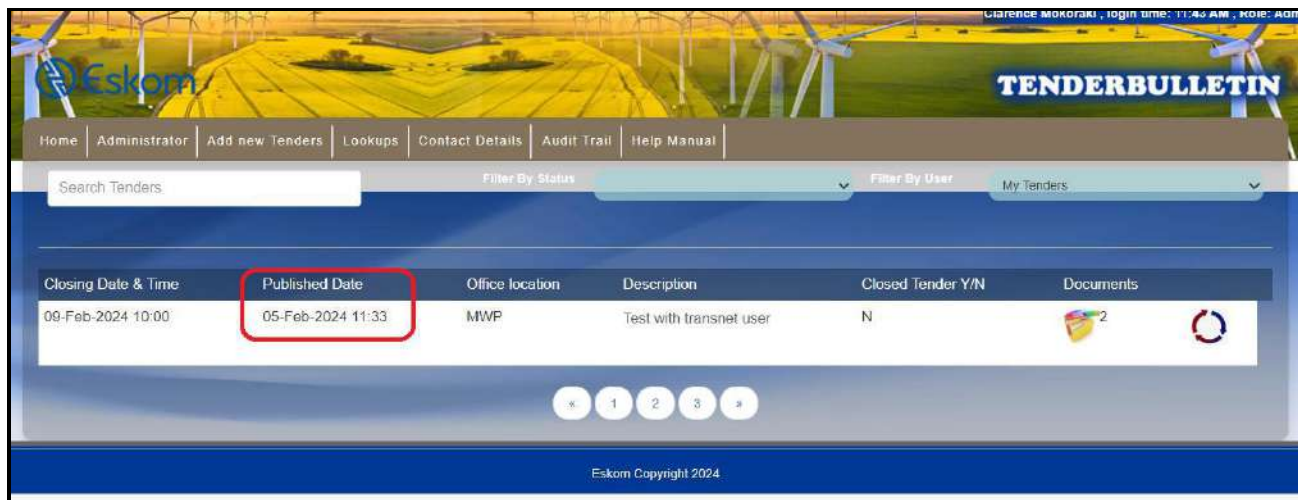


Figure 13

### 1.4.7 Attaching Documents to a Tender

The Home screen will reflect all your active tenders listed.

- On one of the tenders, click on its “Documents” icon. The screen to add documents will appear.

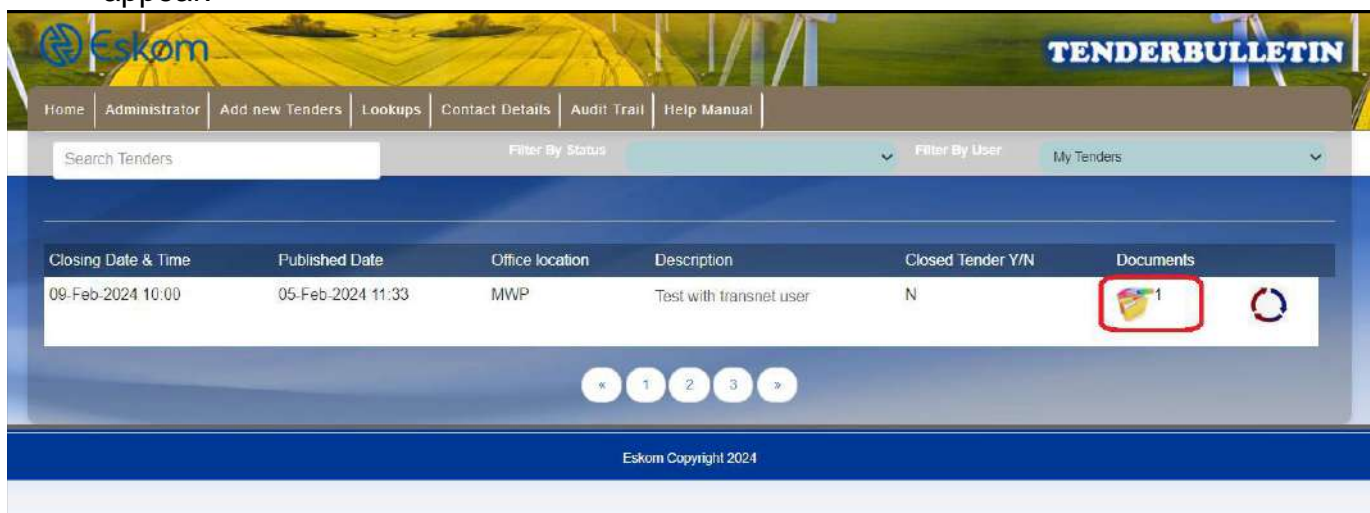


Figure 14

- Click “Browse”, select the documents you want to upload and then click “Open”. Screen with selected documents listed will appear.

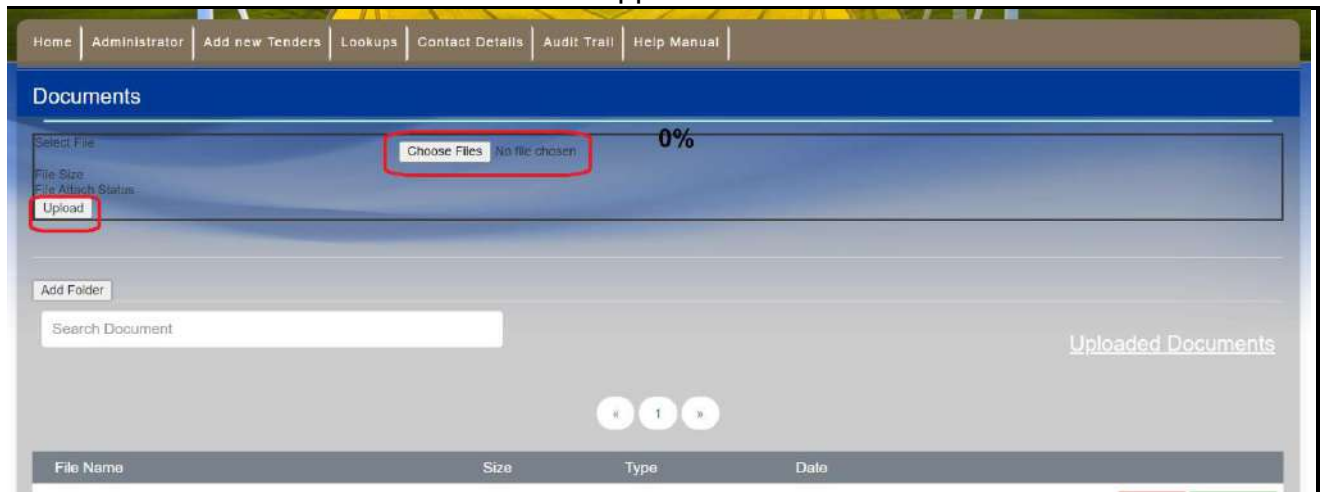


Figure 15

- Click “Upload” to upload the documents. Documents uploaded successfully and message appears to confirm.

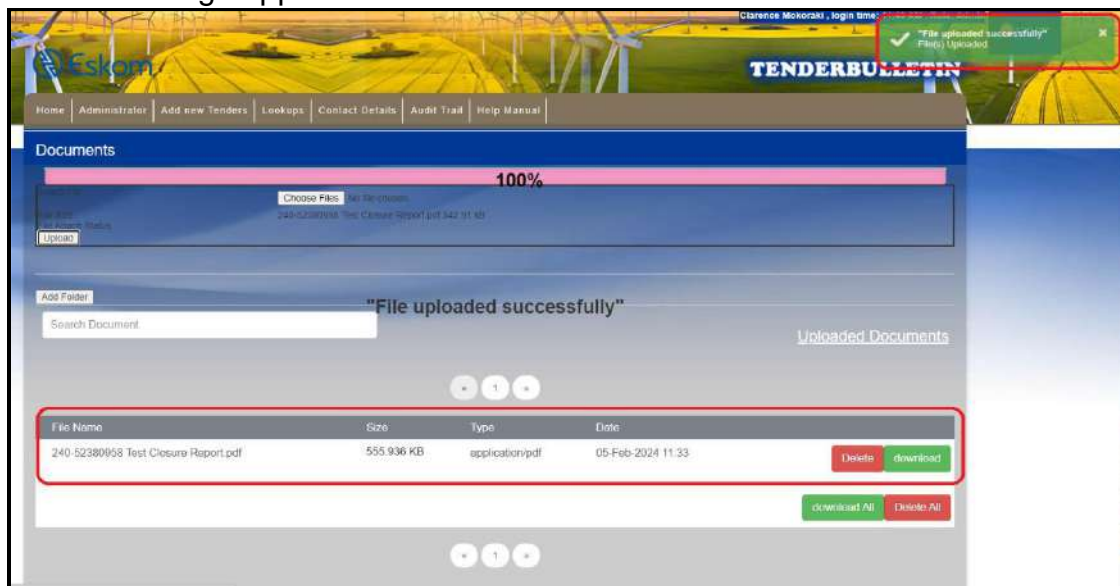


Figure 16

### 1.4.8 Adding folder/s to a Tender

Home screen shows with all your active tenders.

- Click “Documents” icon next to the tender you want to add a folder to. Screen for loading documents and adding folders appears. Click “Add Folder.” The screen to add a folder will appear.

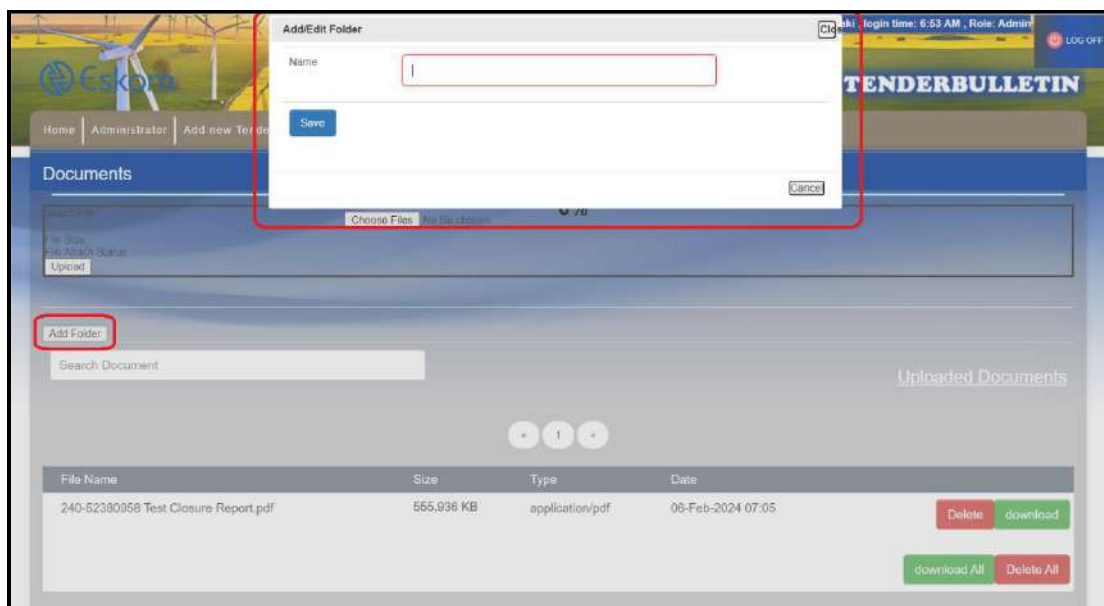


Figure 17

- Type in the name for the new folder and click save. New folder is created, and you will receive a message to confirm that

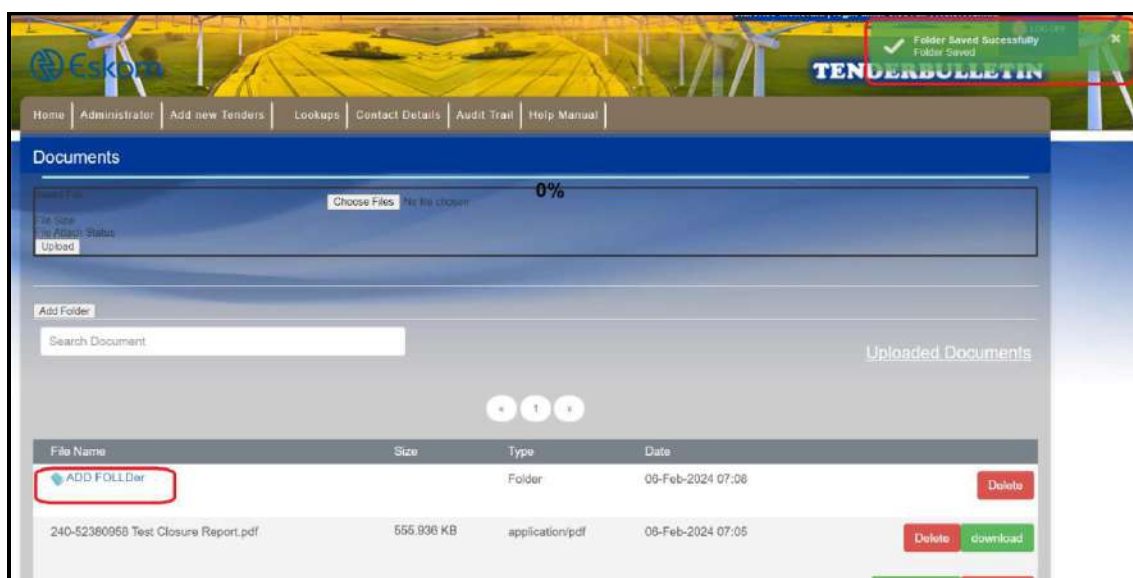


Figure 18

### 1.4.9 Publishing a Tender

Home screen shows with all users' active tenders.

- Click "Publish Tender" icon. The screen to confirm tender publish will appear.

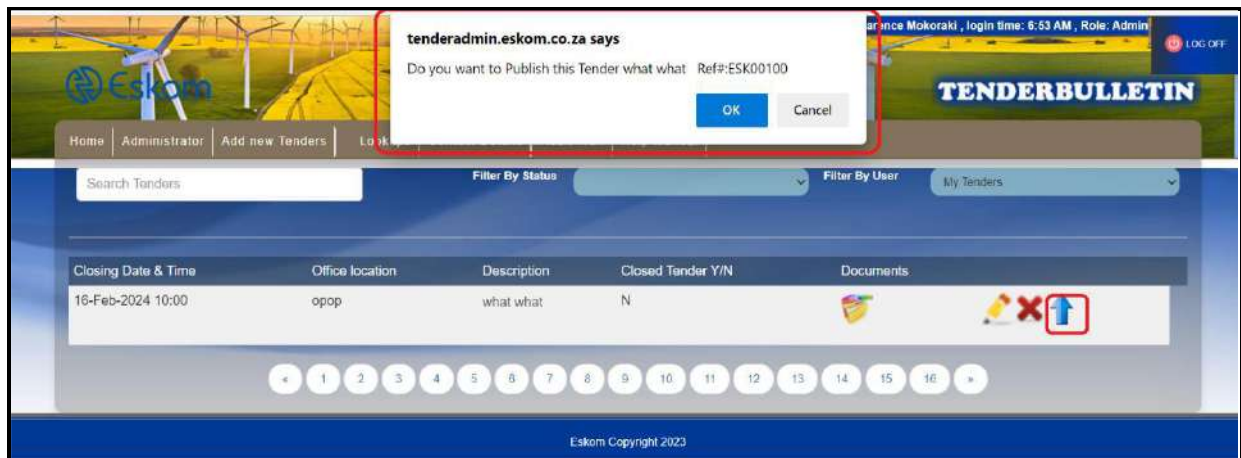


Figure 19

- Click "OK" to confirm. Tender is published. Only the documents and un-publish icons appear next to it.

### 1.4.10 Un-Publish a Tender

- Home screen shows with all users' active tenders.
- Click "Un-Publish Tender" icon. Screen to confirm tender un publish appears.
- Click "OK" to confirm. Tender is un-published and the documents, edit and publish icons appear next to it.

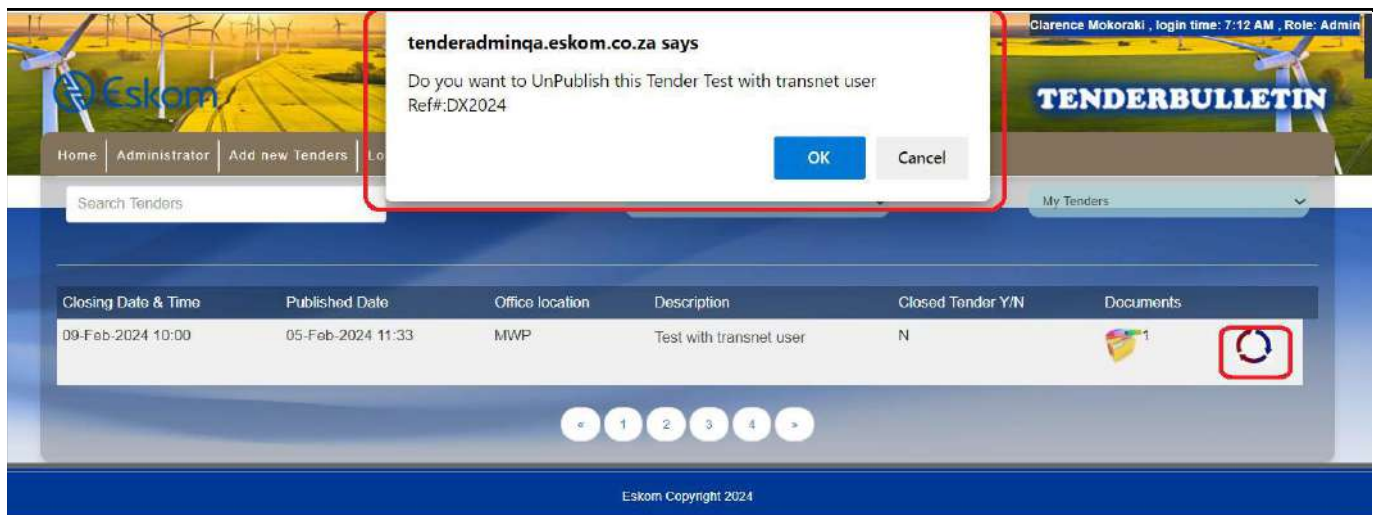


Figure 20



### 1.4.11 Deleting a Folder or Document

Home screen shows with all users' active tenders.

- Click "Documents" icon. Screen for loading documents and adding folders appears.
- Click "Delete" next to a document name. Screen to confirm document deletion appear.

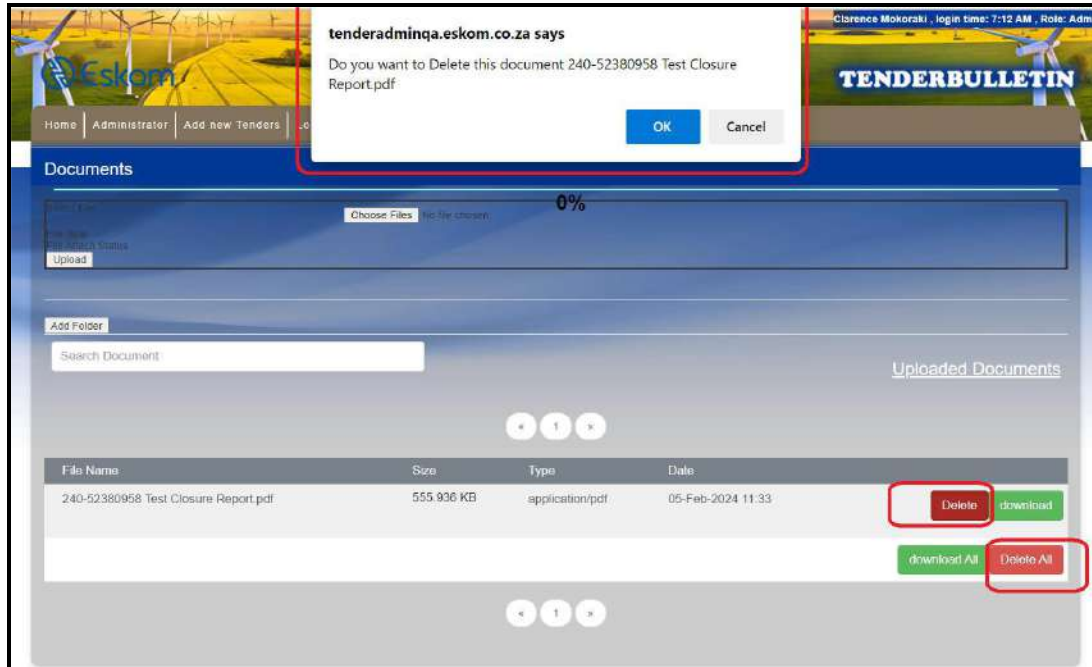


Figure 21

- Click Ok. Document is deleted.
- Click "Delete" next to a folder name. Screen to confirm folder deletion appear.
- Click Ok. Folder is deleted.

### 1.4.12 Deleting a Tender

Home screen shows with all users' active tenders.

- Click "Delete Tender" icon. Screen to confirm tender deletion appears.

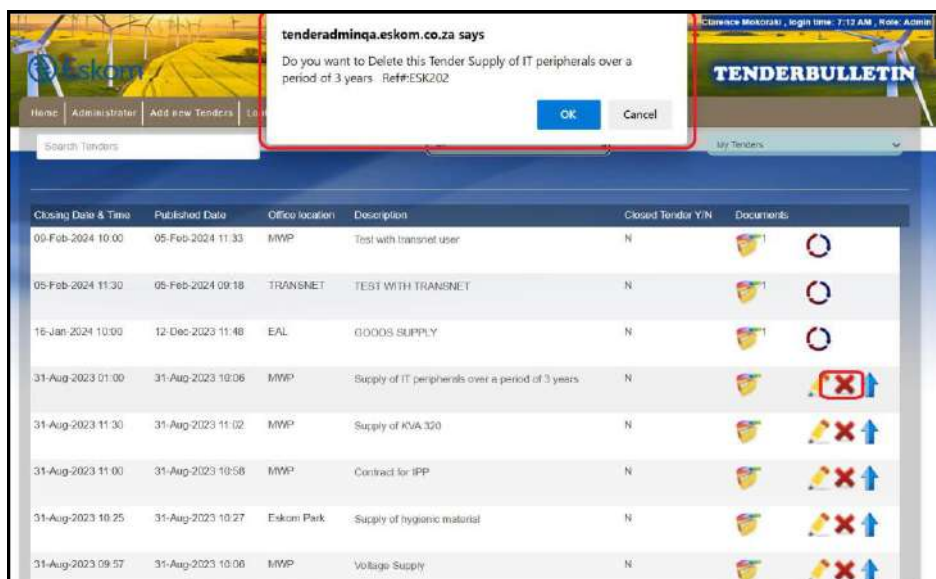


Figure 22

- Click “OK” to confirm. Tender is deleted and is removed from list of active tenders.

### 1.4.13 Restore a deleted Tender

Home screen shows with all users’ active tenders.

- On the “Filter by status” dropdown, select “Deleted.” List of all deleted tenders is displayed.
- Click “Restore Tender” icon. Message to confirm is displayed.

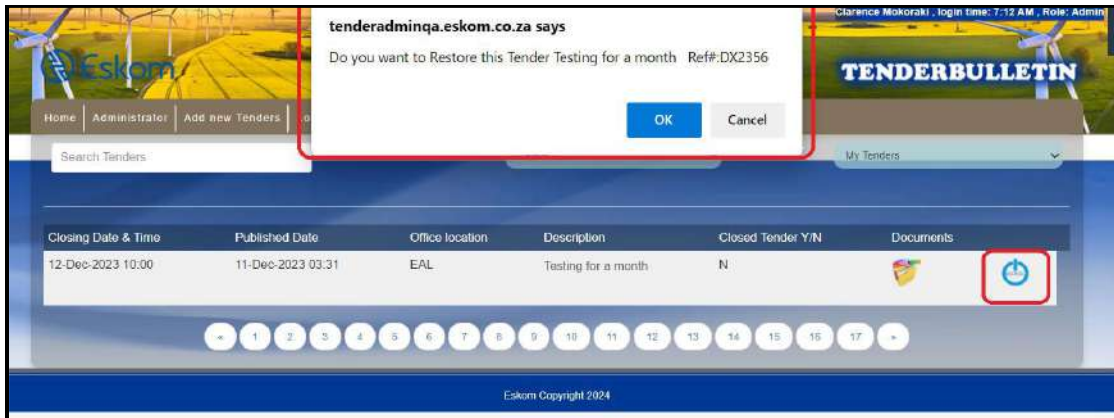


Figure 23

- Click “Ok”. Tender is moved back to list of active tenders.

### 1.4.14 Tender Bulletin Site (Public Facing Site)

- Summary field removed on the landing page and on the tender information section

when a supplier clicks on “view/eye icon” .

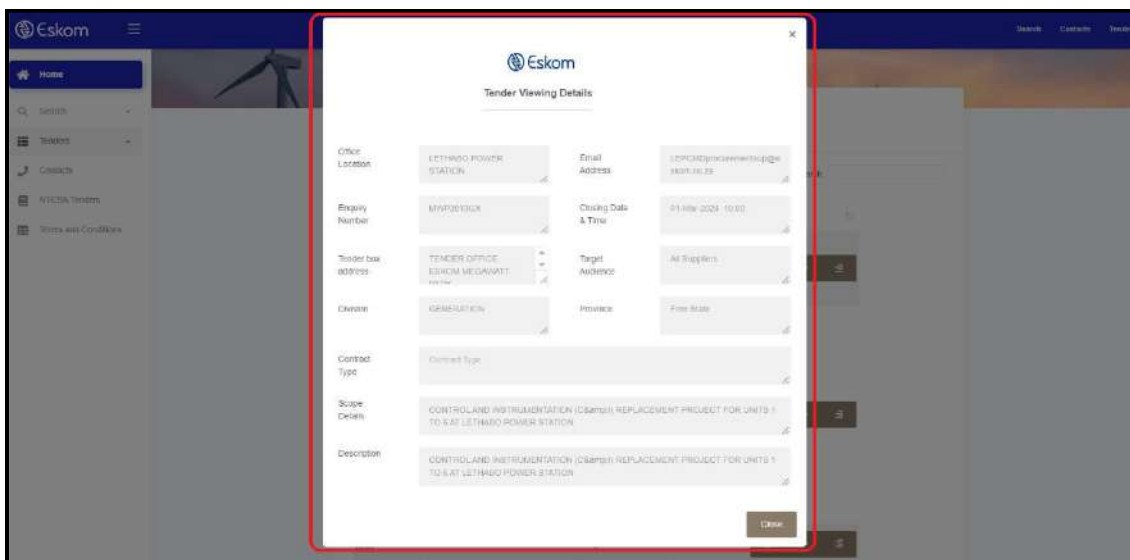
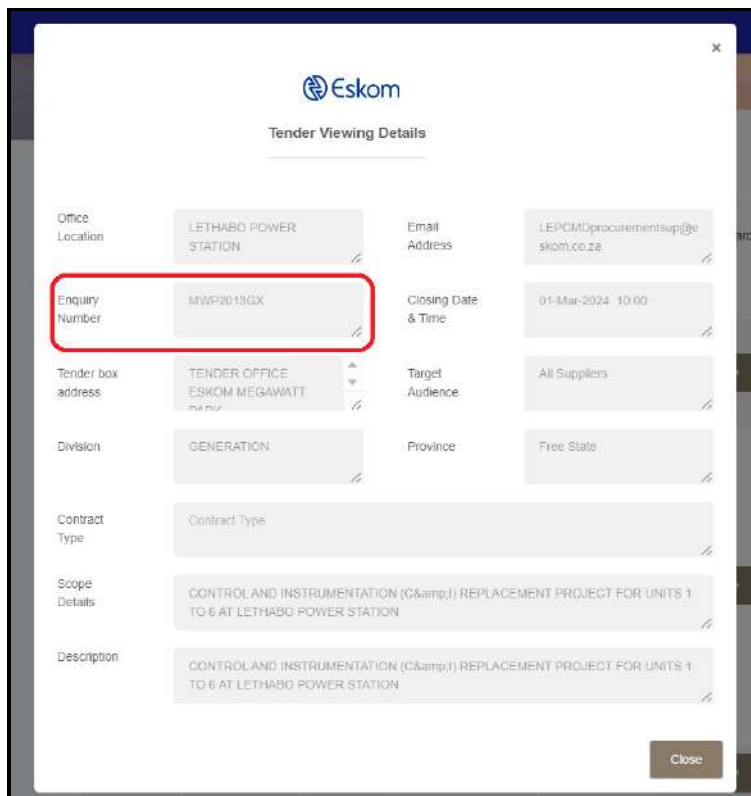


Figure 24



- Upon clicking the “View” option, the Reference Number field will now appear as the Enquiry Number field.



The screenshot shows the 'Tender Viewing Details' window from the Eskom eTendering System. The window contains several fields for tender information. The 'Enquiry Number' field, which contains the value 'MWP2019GX', is highlighted with a red rectangular border. Other visible fields include 'Office Location' (LETHABO POWER STATION), 'Email Address' (LEPCIMDprocurementsup@eskom.co.za), 'Closing Date & Time' (01-Mar-2024 10:00), 'Tender box address' (TENDER OFFICE ESKOM MEGAWATT), 'Target Audience' (All Suppliers), 'Division' (GENERATION), 'Province' (Free State), 'Contract Type' (Contract Type), 'Scope Details' (CONTROLAND INSTRUMENTATION (C&amp;I) REPLACEMENT PROJECT FOR UNITS 1 TO 6 AT LETHABO POWER STATION), and 'Description' (CONTROLAND INSTRUMENTATION (C&amp;I) REPLACEMENT PROJECT FOR UNITS 1 TO 6 AT LETHABO POWER STATION). A 'Close' button is located at the bottom right of the form.

Figure 25

## 2 Searching for Tenders

The system comes with a strong build-in search capability. This allows one to perform searches for tenders on the system. There are many ways to perform a search. You can do a quick search, or search by status or also search by user.

### 2.1 Quick Search

- Click the Home menu option. Home screen shows.
- Type any word on the search window (*We used the word “location” in our example below*).
- All Tenders that have that phrase in their content and whose filter by status is “Active” and Filter by user is “My Tenders” will show. The last two filters are as default but can be changed to further filter your search results.

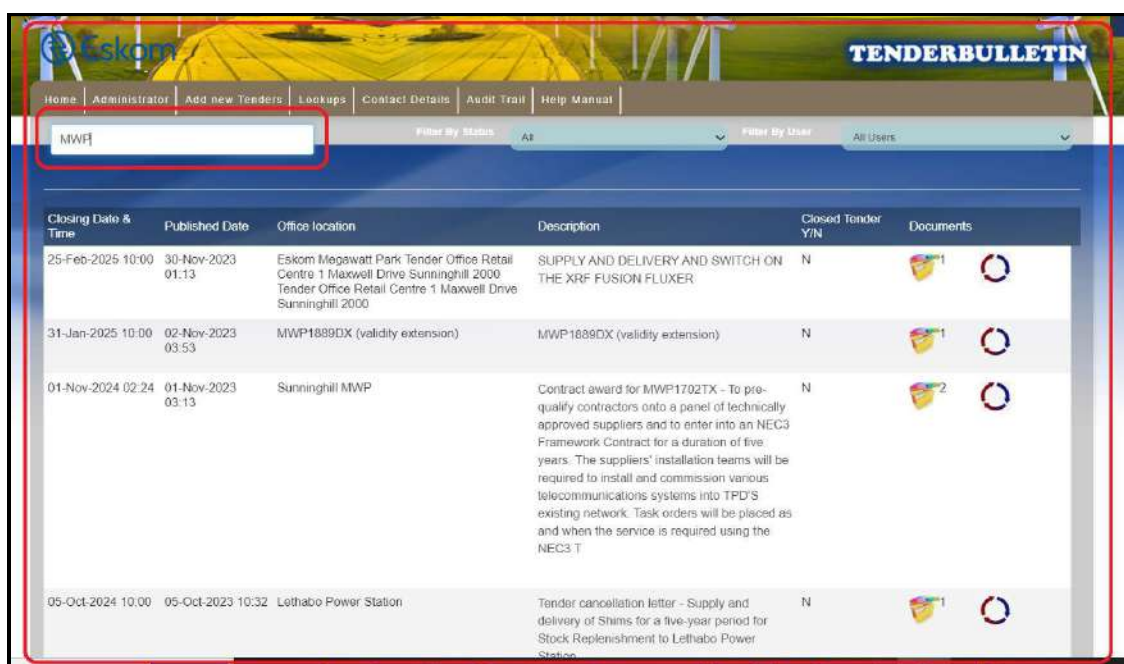


Figure 26

## 2.2 Search by Status

Home screen shows all user's active tenders.

- On the "Filter by status" dropdown, select "Closed." All logged in user's closed tenders will be displayed:

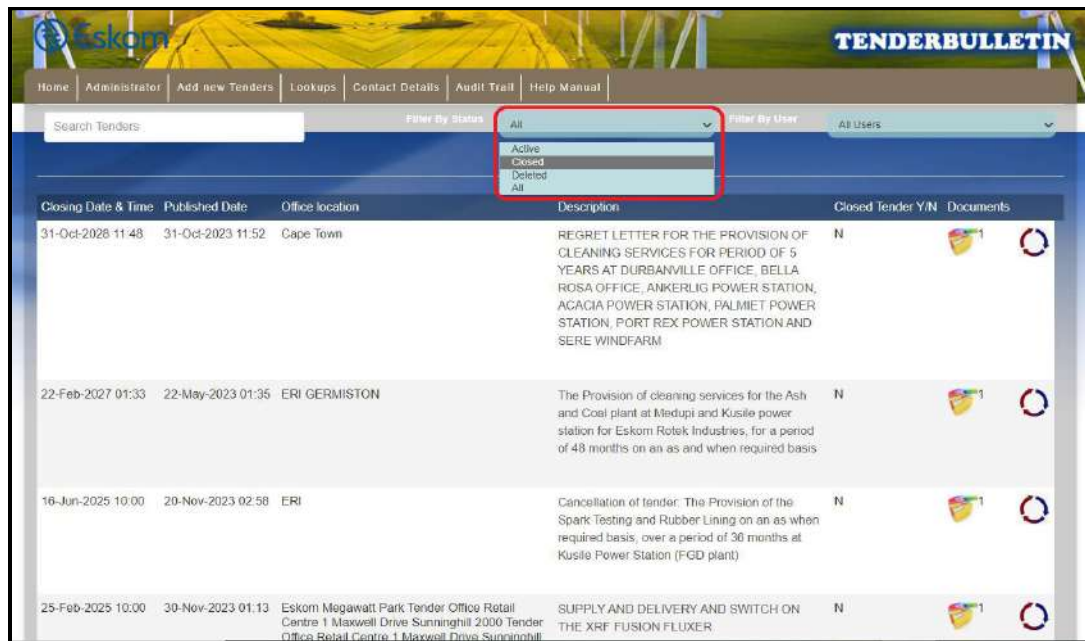


Figure 27

- On the "Filter by status" dropdown, select "Deleted." All logged in user's deleted tenders will be displayed:

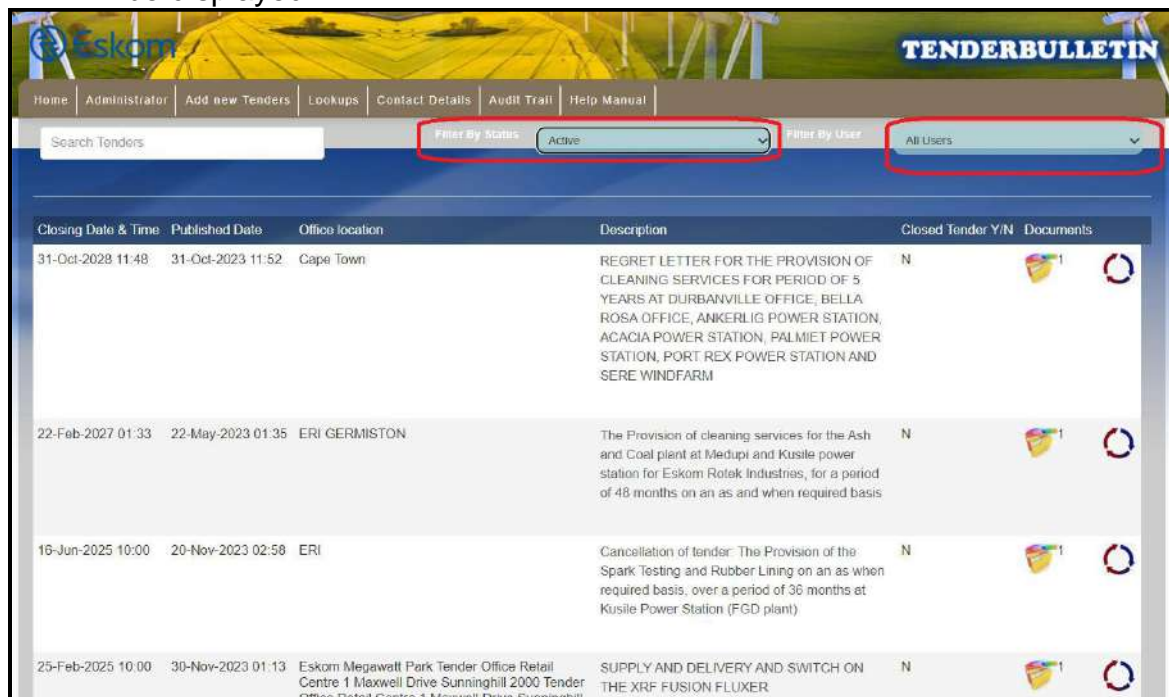


Figure 28

- On the “Filter by status” dropdown, select “All.” All logged in user’s tenders will be displayed:

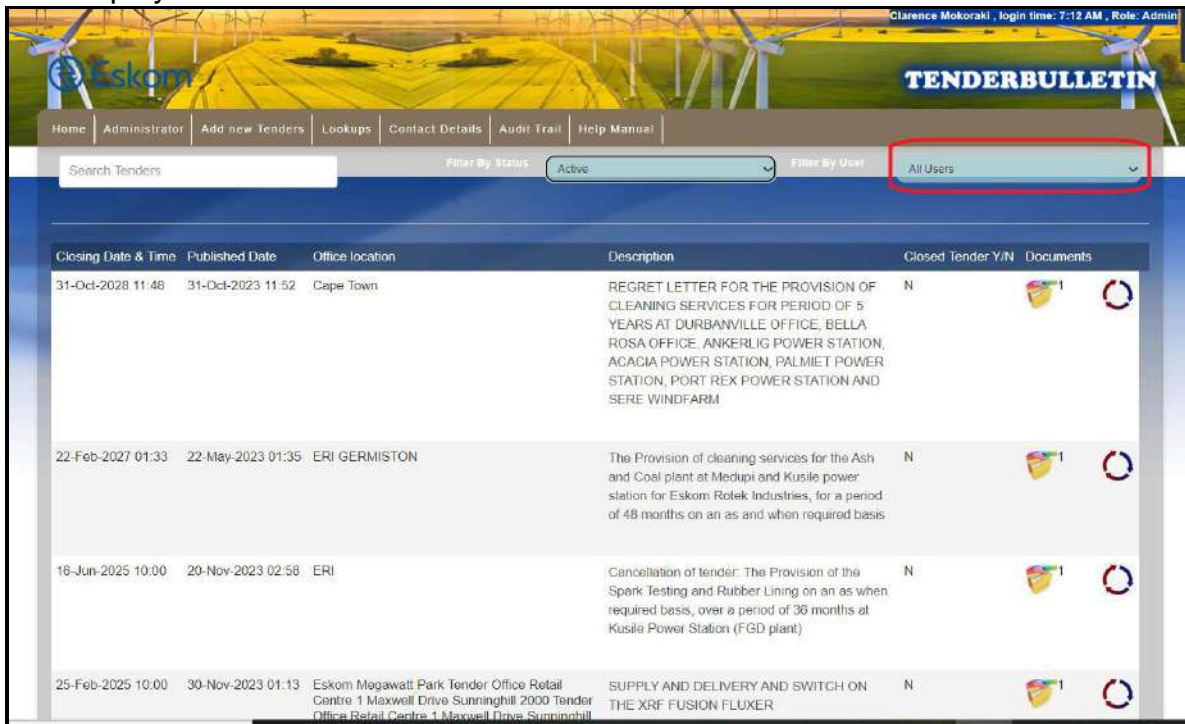


Figure 29

## 2.3 Search for all users' Tenders

Home screen shows all user’s active tenders.

- On the “Filter by User” dropdown, select “All Users.” All active tenders on the system are displayed. The ones not belonging to the logged-on user will appear without the “Edit,” options.

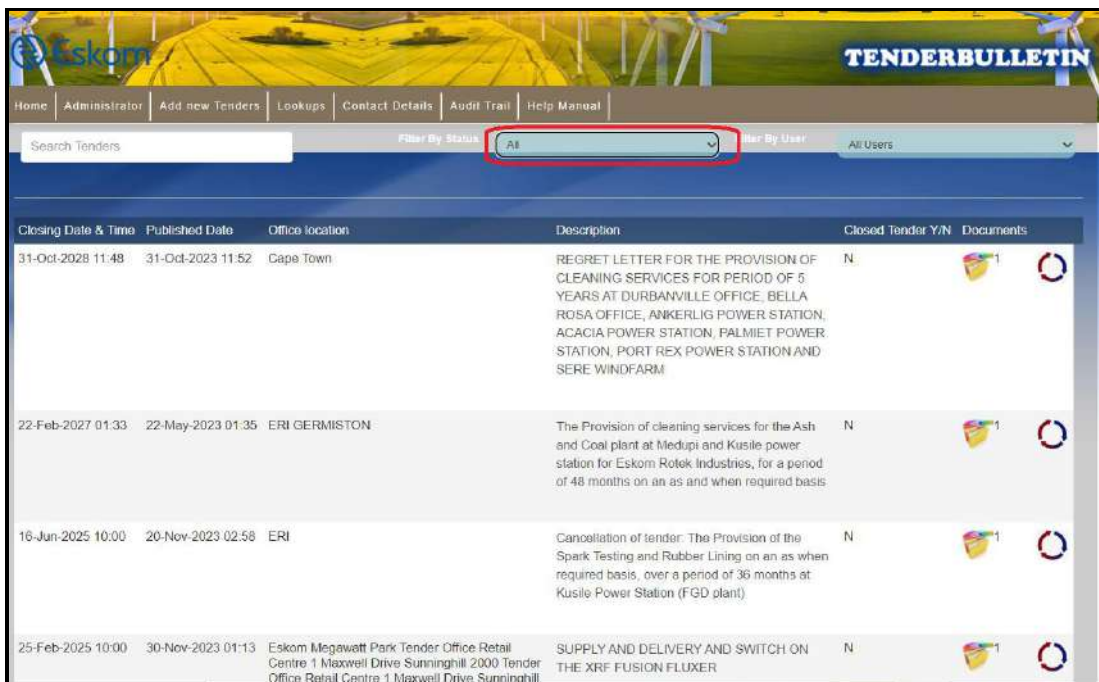


Figure 30

### 3 How to Move the Tender from Tender office space to Enterprise evaluation

- Once the tender closing date has been reached, the tender officer will advise the buyer via [buyercollection@eskom.co.za](mailto:buyercollection@eskom.co.za). that the documents are ready to be collected. The buyer will be given read access to the tender access Tender folder.
- The buyer will then check that the information on the buyer collection sheet is the same as the information in the tender folder, if satisfied, the buyer must sign the buyer collection sheet and return to the processing tender officer via [buyercollection@eskom.co.za](mailto:buyercollection@eskom.co.za). If the buyer is not satisfied with the information, he/she will make the correction on the buyer collection and send back to the tender office.
- Once the tender officer receives the signed collection sheet, he will notify his manager who will then give full control to the buyer.
- The buyer then removes the tender office personnel's access to the folder and adds his manager to the folder giving them full control.
- It must be noted that access must be removed for all sub folders
- The buyer then creates a folder in the enterprise formal tender evaluation space under his name using the enquiry number as the name of the folder

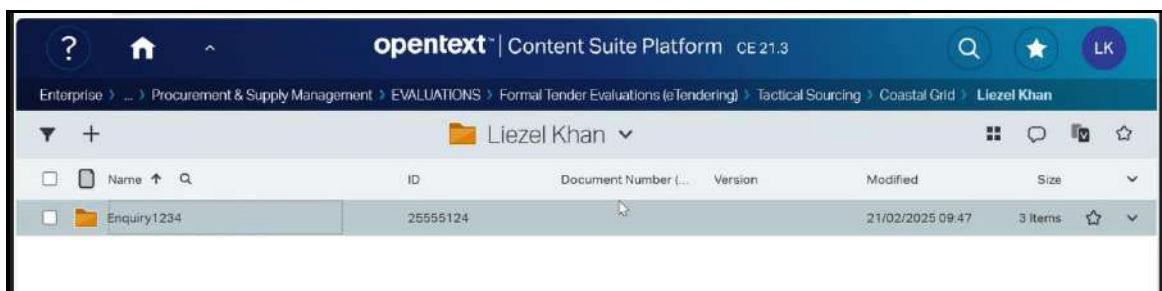


Figure 31

- The buyer will then copy the tender information from the tender enquiry number folder in 'Tender office workspace' to the enquiry number folder in the 'enterprise formal tender evaluation' space under his/her name.
- Generate an audit report (refer to 7. How to draw the audit report for OpenText) to verify that the information was not compromised (corrupted or duplicated) during the move
- The documents are now ready for evaluation



## 4 How to sort the Tenders in preparation for evaluation

- The buyer will create sub folders in the enquiry number folder for each evaluation category e.g. Technical, Commercial, SHEQ and Financial

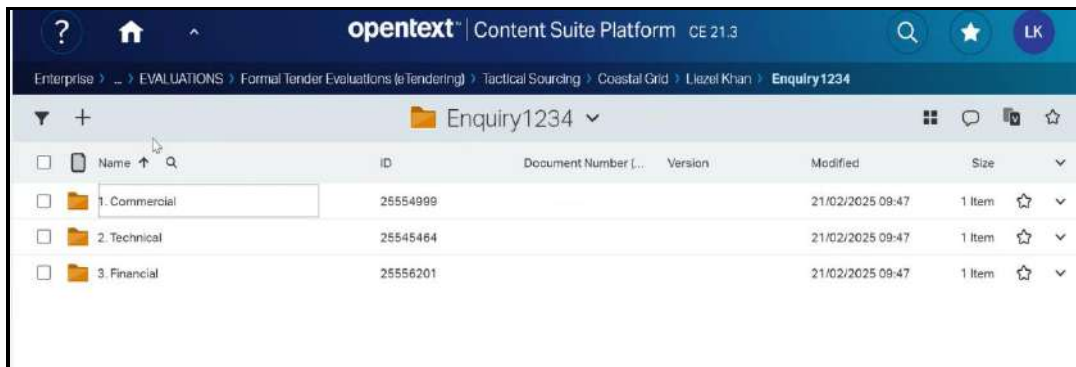


Figure 32

- The buyer must copy **all** the tender submissions to each sub folder e.g. Technical, Commercial, SHEQ and Financial
- Basic compliance checks need to be performed
- Non-Mandatory documents can be added to the folders
- Tip: Once the information has been copied to each sub folder, the buyer will then delete the category that is not applicable to that sub folder. e.g. delete the Financial, Technical etc folders per supplier that is in the Commercial folder.
- Please note that this is done to facilitate easier access control for the buyers

## 5 Notification to Evaluator

### 5.1 How to notify evaluator of tender ready status

- When the tender has been moved to OpenText evaluation space, write an email to the evaluators advising them that tenders are ready for evaluation. An example of an email is set out below.

Good day evaluators

Boardroom number 123 has been booked for your evaluations. When you are in the boardroom, please notify me so that I provide you with reader access to the folders.

Please note:

- Evaluations can only be done on an Eskom site
- Documents should not be downloaded, printed or duplicated in any form.
- Please ensure that you view the tender documents in 'Classic view'.** Please liaise accordingly should you need assistance on how to access this view.
- It is your responsibility to ensure that the integrity of information is upheld
- Access will only be granted for a limited time and will be revoked at the end of each business day while evaluations are taking place. You will be required to re-request access every time you need to evaluate.
- Access will only be granted to evaluators that have completed the necessary documentation e.g. DOA and NDA



## 5.2 Email when evaluator is in evaluation room

- Once the evaluator is in an Eskom site and you receive confirmation thereof, give the evaluator access to the respective folders as 'read-only' access.

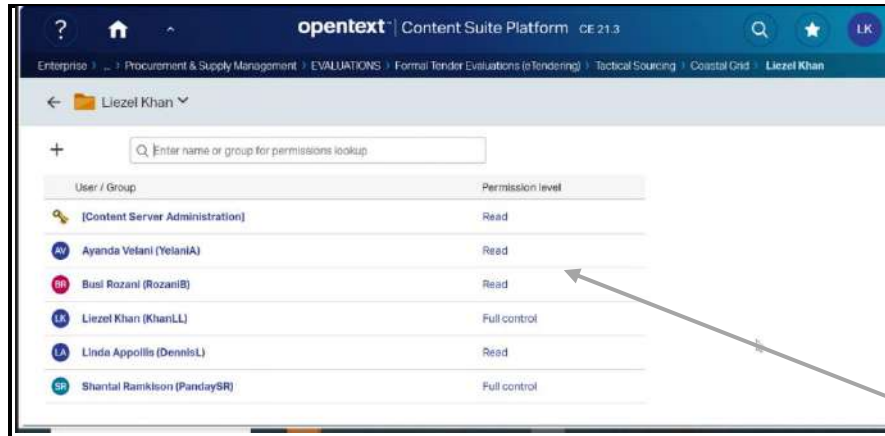


Figure 33

- If the evaluator requires to continue the following day the access needs to be taken back and issued the following day for the agreed time for continuation.
- The status/permission should change from "Read" to "None"
- It is recommended that a daily reminder is set up in Outlook for you to remember to remove the access of all evaluators.

RE: Evaluation access enquiry number Eskom 1234

Good morning evaluator

Thank you for confirming that you are at an Eskom site. Please be reminded that evaluations can only take place on an Eskom site.

Kindly note that read access to the folder is being given to you until end of business today. If you have completed your evaluations before this time, please let me know so I remove your access. **Please ensure that you view the tender documents in 'Classic view'.**

[Insert link]

Please note that if no response is received from you by 15:30 (an hour before you finish work), your access will be removed, and you will have to request access again when needed

Please be reminded:

- Documents should not be downloaded, printed or duplicated in any form.
- Please ensure that you view the tender documents in 'Classic view'.** Please liaise accordingly should you need assistance on how to access this view.
- It is your responsibility to ensure that the integrity of information is upheld

## 5.3 Virtual evaluation room rules

- Evaluations can only be done on an Eskom site
- Only yourself (buyer) and the procurement manager must have full access to the OpenText evaluation folders.
- Documents should not be downloaded, printed or duplicated in any form
- Access must be granted only for the requested timeframe. 30 minutes before your end of day, the access must be changed from “Read” to None” and requested afresh in the following day.
- The documents should only be viewed by the evaluators on “classic view” see 2.7.1 below.

### 5.3.1 Viewing a file in classic view

- The Evaluator should access the tender file in “classic view “and this will allow for the generated audit report to reflect the evaluator as having read the file and not “downloaded”.
- Click on the Profile Menu button
- Select Classic View

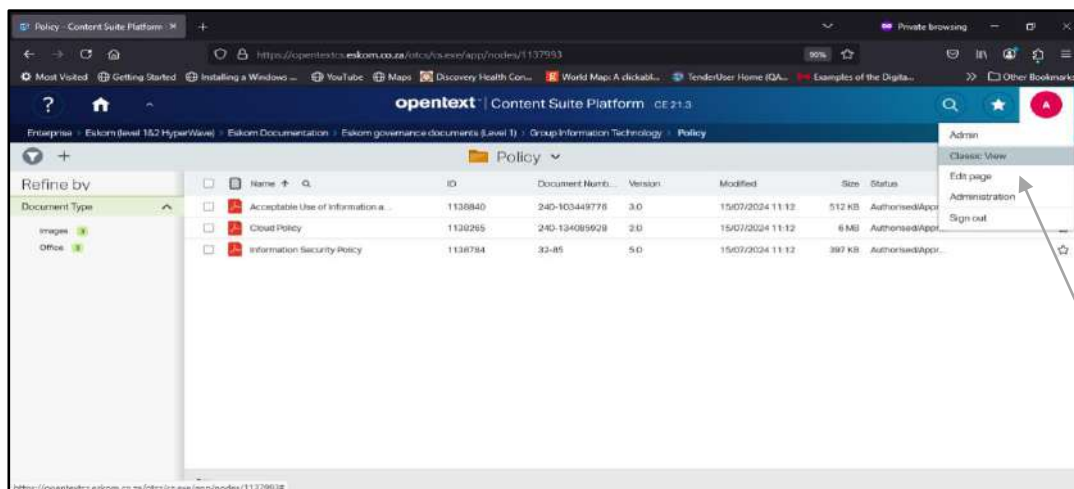


Figure 34

- Click the drop-down menu button next to the file name

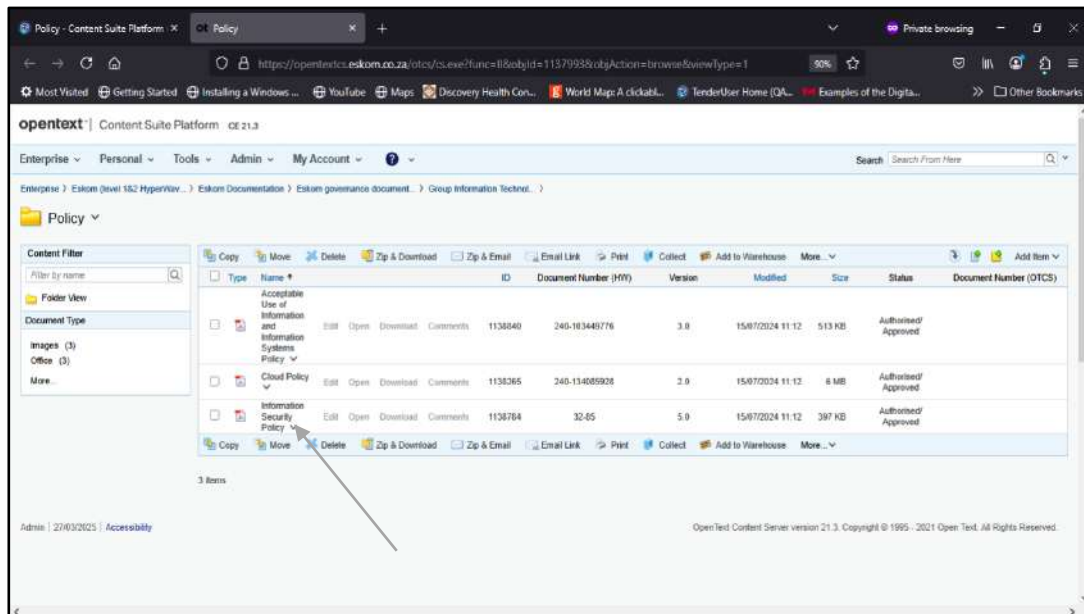


Figure 35

- Select View as Web Page

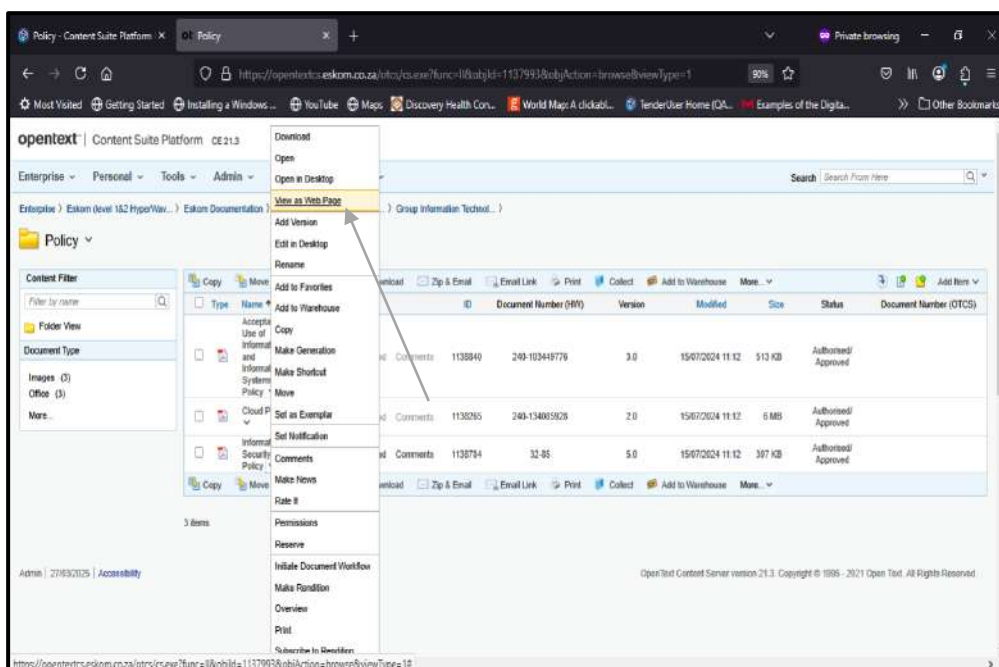


Figure 36

- The file is displayed

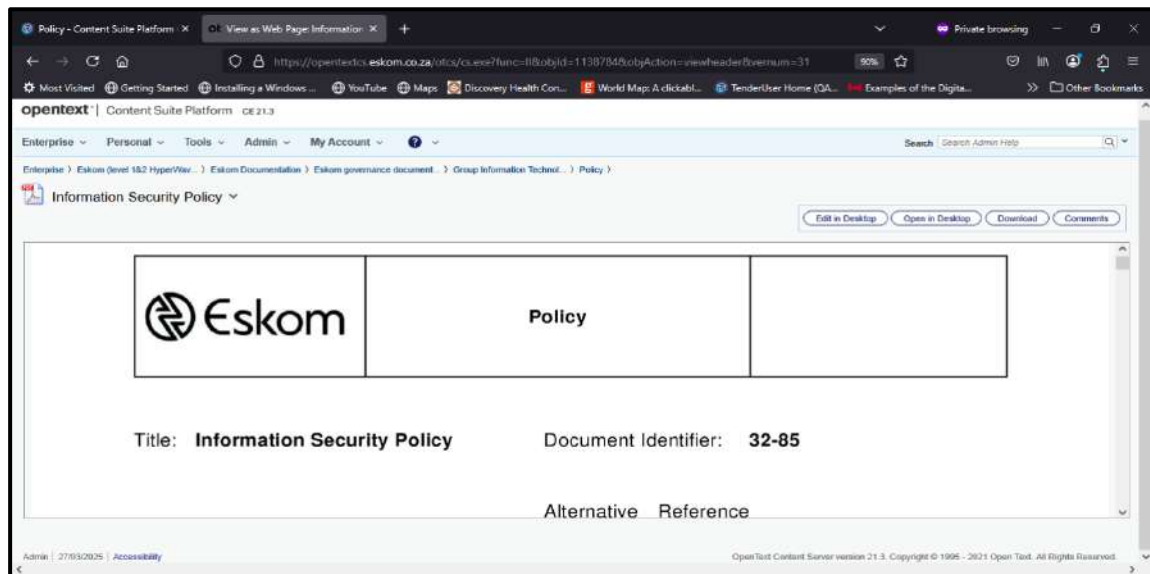


Figure 37

## 6 MS Team for collaboration

### 6.1 How to create a Team/ Main folder

Create a Team on MS Teams for the specific tender/enquiry number. *The buyer and procurement manager must be the owners of the Team*

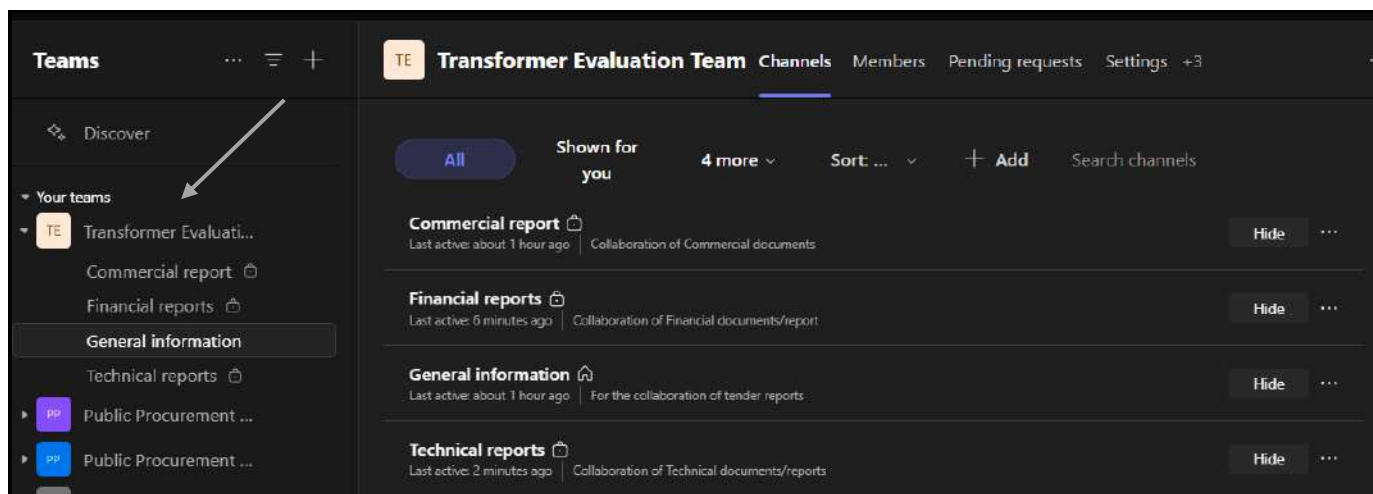


Figure 38

### 6.2 How to create channel/ subfolder

The channel must be private. The buyer and procurement manager must be the owners of the channel, and the evaluators will have access to their folders only

- Create a channel folder for each of the evaluation reports (commercial, financial, technical)  
Assign each evaluator access to their folder only

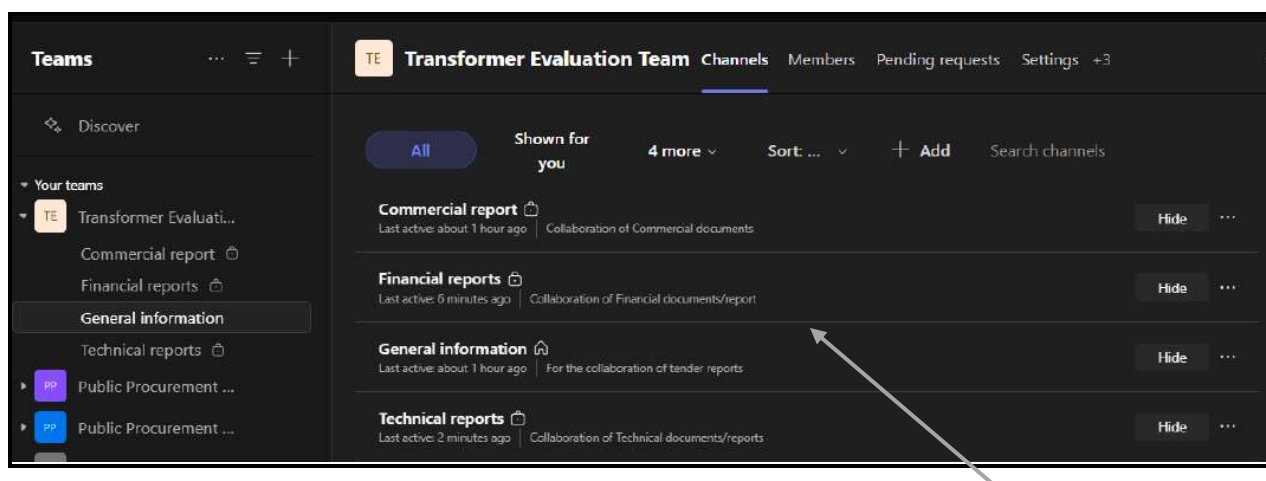


Figure 39

## 7 How to draw the audit report for OpenText

- Navigate to the evaluations folder on OpenText
- Click the Audit report folder

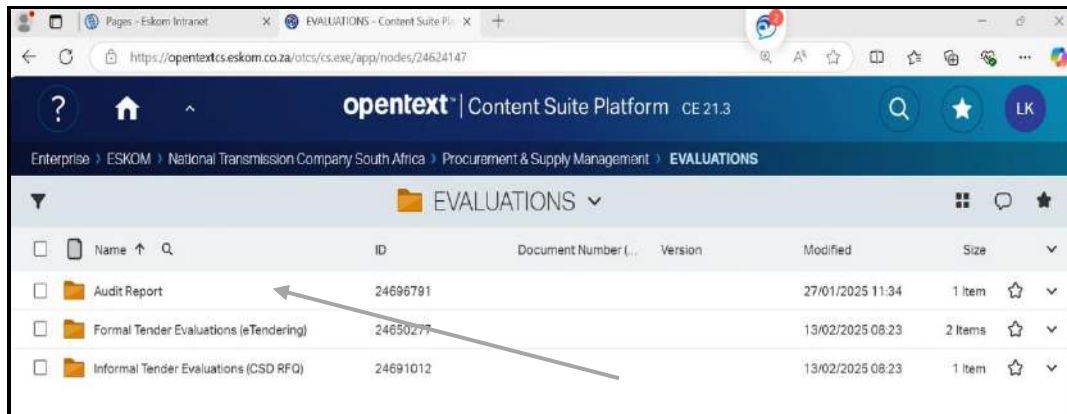


Figure 40

- Open the Audit WebReport folder

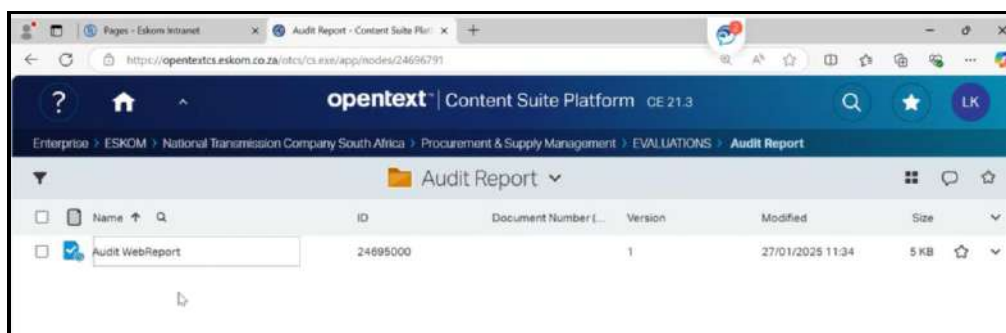


Figure 41

- Fill in the enquiry number and generate the report

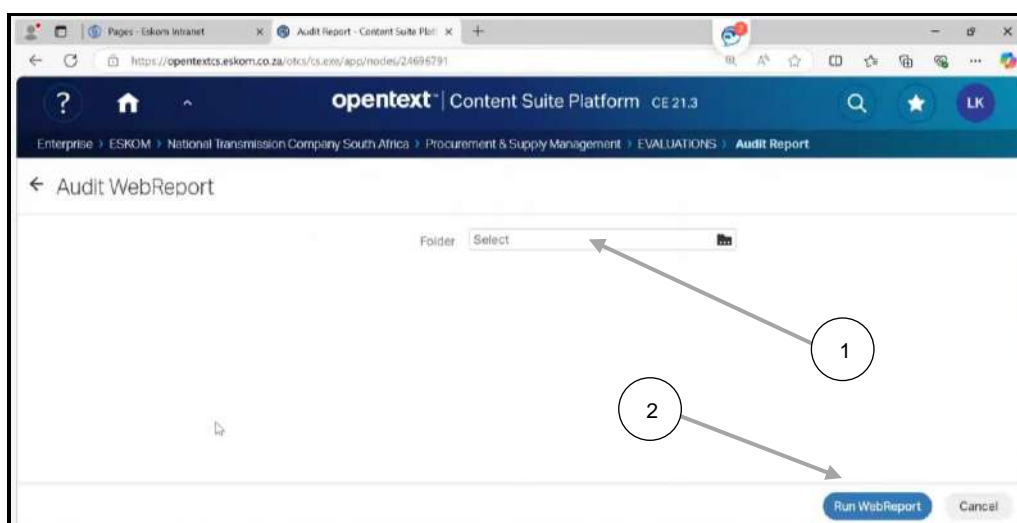


Figure 42



## 8 Document management

After evaluation, documents for both the virtual evaluation room in OpenText and the document is MS Team for collaboration is moved to OpenText document management for record keeping.

These are the platforms on which the documents will be managed:

- OpenText
- Tender Bulletin
- MS Teams