

Video Segment: eTendering Portal User Guide

1. Slide – “Welcome to the eTendering Supplier Guide”

Script:

<Background music >

<Long Pause>

Welcome to the BravoSolution eTendering Supplier Guide!

<Build> (Spot light over screen shot)

This video will take you through the process of registering on the portal and viewing available contract opportunities.

<Pause>

Please bear in mind this is a generic video to assist in registering on the portal and not specific to any one project, procurement opportunity or buying organization.

2. Slide – “What is eTendering?”

Script:

The eTendering portal is a secure, web-based, collaborative tool which allows the Buying organization to conduct the tendering process online.

The Portal is provided by BravoSolution, an official Canadian Public Sector eTendering Service Provider.

The benefits for tender applicants are:

A secure environment that is available 24 hours a day, 7 days a week via the Internet

The portal is fully compliant with the Canadian Public Sector Procurement Legislation and processes.

The ability to instantly publish tender responses helping to reduce suppliers printing and courier costs when responding to an electronic tender via the e-Tendering portal.

Providing a full audit trail and application history for future reference for both the Buying organization and suppliers.

...and helping to reduce the carbon footprint throughout the supply chain.

<Pause>

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3. Slide – “Accessing the eTendering Portal”

Script:

<Build> (slide)

The eTendering portal is accessible to anyone with a computer and a reliable Internet connection.

PC users will need a recent version of Internet Explorer; this can be downloaded free from www.microsoft.com.

If you're a Mac user, you should download the latest version of Firefox free from www.mozilla.com/firefox/

It will also be useful if you have a recent version of Java installed on your computer. Java is not essential to use eTendering, but it is required for some advanced functions such as mass uploading and downloading attachments. You can download it free by visiting [Java's Website](#).

It is strongly recommended that pop-ups be enabled in your browser. This will allow a warning message to appear if your session has been inactive for over 15 minutes and is about to be logged out. This is an important security requirement for all government e-Tendering portals.

Please note that when navigating through pages on the portal you must always use the links within the system to move between the different screens of any tendering exercise.

The use of the back and forward buttons may result in your session being timed out and any unsaved data being lost.

4. Slide – “Opportunities and Registration Portal”

Script:

<Build> (screen shot appears)

<Build> (Spot light over tendering opportunities)

Opportunity Listings are used by the buying organization to advertise forthcoming public procurements.

You can view the forthcoming Opportunities from the login page without having to register or login to the portal.

Just click the “View Current opportunities” link and browse through the list of active public procurements.

If you find something of interest, then you'll need to register or login to view details of that procurement.

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<Pause>

<Build> (Spot Light over 'register' link)

To register your organization for eTendering, click on 'Click here to register'.

<Pause>

Registration on the eTendering Portal is free and only requires a simple registration form to be completed to gain instant access to tendering opportunities. For supplier registering on a portal which is using the optional eVendor management tool you may be required to enter further profile information.

5. Slide – “Accepting the User Agreement”

Script:

<Build> (screen shot appears)

<Build> (Spot light over 'Continue' Link)

All organizations should read through the 'User Agreement'. You must then tick the box that states 'I agree' and click the 'Continue' link to proceed.

6. Slide – “Registration Data – Organization Details”

Script:

Please complete ALL the 'Registration Data' fields ...

<Build> (Spot light over section Organization Details)

The first section of the form gathers information on the organization registering

7. Slide – “Registration Data – User Details”

Script:

<Build> (Spot light over section 2 User Details)

... and the second section gathers information about the key individual within your organization who will be responsible for managing bids to the buying authority.

<Pause>

Please take extra care to ensure you enter your email address and contact details correctly.

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If these details are not entered correctly you will not receive the registration email containing your password!

If you wish to register with multiple email addresses you may do so by using a semicolon to separate them.

And please be sure to make a note of your chosen username - we recommend that you choose something memorable, like the name of your organization!

<Build> (Spot light over 'save' link)

Once completed, please click 'Save.'

8. Slide – “Basic Profile Form: Additional Registration Details”

Script:

<Build> (Click on 'Save' then screen shot 2 appears)

Dependant on whether the buying organization is using the optional Vendor management tool, Once you have completed the registration form you may be directed to a basic supplier profile screen where you will be requested to provide some additional organization information.

This information will only need to be completed once; however you should update your profile when required, to ensure that the most up to date information is available within the system.

The key benefits of creating a profile include:

Helps reduce the time and effort spent resubmitting the same data across multiple RFx

Supplier profiles can be updated at any time as your organization circumstances change

<Build> (Spot light over 'save and continue' link)

...once completed please click 'Save and continue'.

9. Slide – “Category Tree”

Script:

<Build> (Demo Category Tree search, Expand and Select Category)

Save and Continue will bring you to a screen where you can select the appropriate UNSPC code for your organization.

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<Build> (Spot light over 'Expand All' link)

You can expand the lists to display the second level of categories available.

10. Slide – “Category Tree – Expanded Category Tree”

Script:

<Build> (Screenshot 'Expanded Category Tree')

<Pause>

11. Slide – “Category Tree – Search”

Script:

<Build> (Spot light over 'Search' box)

In addition you can use the search feature to find and select all needed codes.

<Build> (Spot light over highlighted results)

Be sure to scroll down after clicking on search to find all the codes that match your search highlighted in yellow.

12. Slide – “Registration Email”

Script:

<Build> (Screenshot 'Registration Email')

Clicking on Save will generate an email confirming your username and temporary password.

When you have received this email, please ensure you add the sender to your safe senders list to prevent future messages from being blocked by your anti-spam software. If you do not receive the message within an hour, please check your junk email folder.

Your username is detailed in the alert for future reference, but the password is only temporary. When you login to the portal for the first time, you will be asked to change the password to something more memorable.

If you ever forget your new password, you can request a new one to be emailed to the registered e-mail address by clicking on the 'forgotten your password' link on the main page at any time.

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13. Slide – “Manage Your Profile”

Script:

<Build> (Screen Shot 1)

If the buying organization uses the optional eVendor Management tool and you need to update any of your profile details in the future, you can do so by clicking on the Manage your profile link from the Home Reserved Area.

<Build> (Spotlight Click manage your profile)

14. Slide – “Edit Your Profile”

Script:

<Build> (Screen Shot 2)

To edit your profile, simply click on the Edit button.

If you wish to, it is also possible for you to create additional sub-user accounts on the portal, allowing colleagues to participate in eTendering activities, but we strongly recommend one senior contact manages access for your organization.

15. Slide – “Manage Users”

Script:

<Build> (Spotlight over manage users)

In order to create additional user accounts, first log in to the portal, then click the ‘Manage Users’ tab.

From here you can create user accounts for other individuals within your organization to get involved in tenders.

You can decide what rights the new user accounts should have to view and respond to RFx.

The new user accounts can then receive any automatic email alerts and communications from the buying organization regarding specific tenders.

<Build> (Spotlight over manage users)

To begin creating a new user account, click the ‘Manage Users’ tab.

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16. Slide – “Create New User”

Script:

<Build> (Screen Shot)

<Build> (Spotlight over ‘add user’)

Click ‘Create to enter the details of the new account.

17. Slide – “New User Details”

Script:

<Build> (Screen Shot)

Enter the ‘User Details’ on this new user form and click ‘Save’.

This form will ask you to specify a username. Please choose a username that will be memorable to the new user.

A good guide may be to use the first initial and surname of the intended user, for example JSmith for John Smith.

Once you have completed the ‘New User’ form, click Save to create the user account.

18. Slide – “Accessing User Rights”

Script:

Next you will need to assign user rights for the account.

<Build>(Spotlight over ‘View user rights’)

Click ‘View User Rights’ to define these rights.

19. Slide – “View User Rights”

Script:

<Build> (Screen Shot)

As a default, the portal will not assign any user rights for new accounts. This means that newly created additional users cannot perform any actions on the portal.

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To ensure the new account has adequate levels of access to tenders you must edit their user rights accordingly.

<Build>(Spotlight over 'Edit')

Click 'Edit' to assign user rights.

20. Slide – “Edit User Rights”

Script:

<Build> (Screen Shot)

Amend the user rights by selecting the relevant options from the drop down lists provided.

<Build>(Spotlight over 'Save')

Once complete click 'Save'. This has now successfully created a new account with the requested level of access.

21. Slide – “Further Help”

Script:

<Build> (Screen Shot)

This concludes our introduction to registering on the eTendering portal.

If you need further help, please check out the online help for suppliers or contact the BravoSolution helpdesk at eTenderhelp_CA@bravosolution.com or by phone at 1-866-722-7390.

<Background music >

Thank you for your time.

<Fade to black>