AVEVA CONTRACT RISK MANAGEMENT

Instruction to Tender/RFP Online

Professional Services
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1.   INTRODUCTION

For the purpose of interpreting this Instructions to Tender Guide, below terminology used in Aveva CRM and this guide shall have the meaning of the words in the RFP as follows:

| Terms used in Aveva CRM Solution & in this Instruction to Tender Guide.	Terms used shall have the following meaning.
Tender or ITT/RFX or Invitation to Tender or Invitation	Proposal or RFP
Tender Message	Notice or Addendum or Addendum or other type of communication set forth in Part I – REQUEST FOR PROPOSAL – Article B PROPOSAL INSTRUCTIONS.
Contractor	Proposer

2.   CRM Access & Navigation

2.1.   Logging on to CRM for the First Time

This section will explain how to access and navigate your way around CRM to allow you to work comfortably within the solution.

You will receive your '**Username** and **Password'** in an e-mail from IMI (International Maritime Industries).
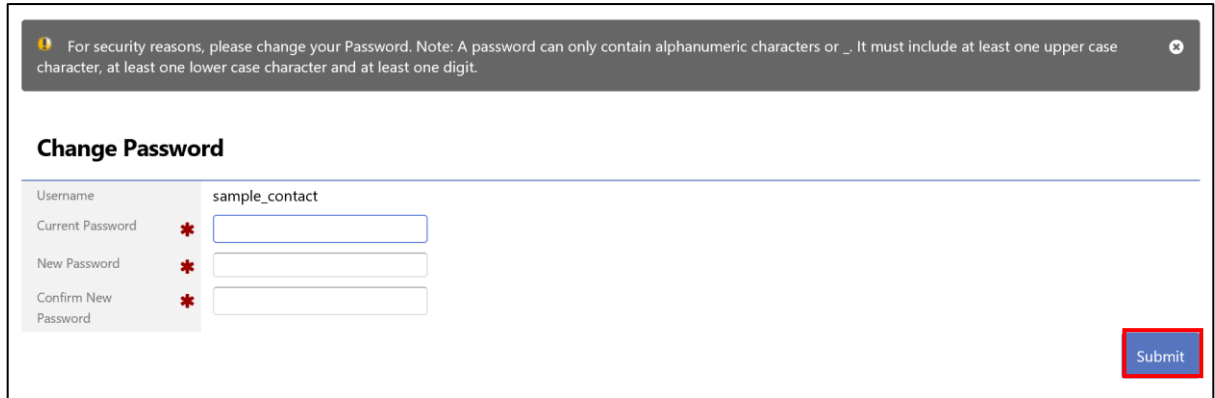
To log onto to the CRM Contractor Portal:

1. Start your web browser (Supported browsers - Microsoft Edge & Microsoft Chrome)
2. Enter *https://prdcrmweb.imi-ksa.com* into the browser address bar

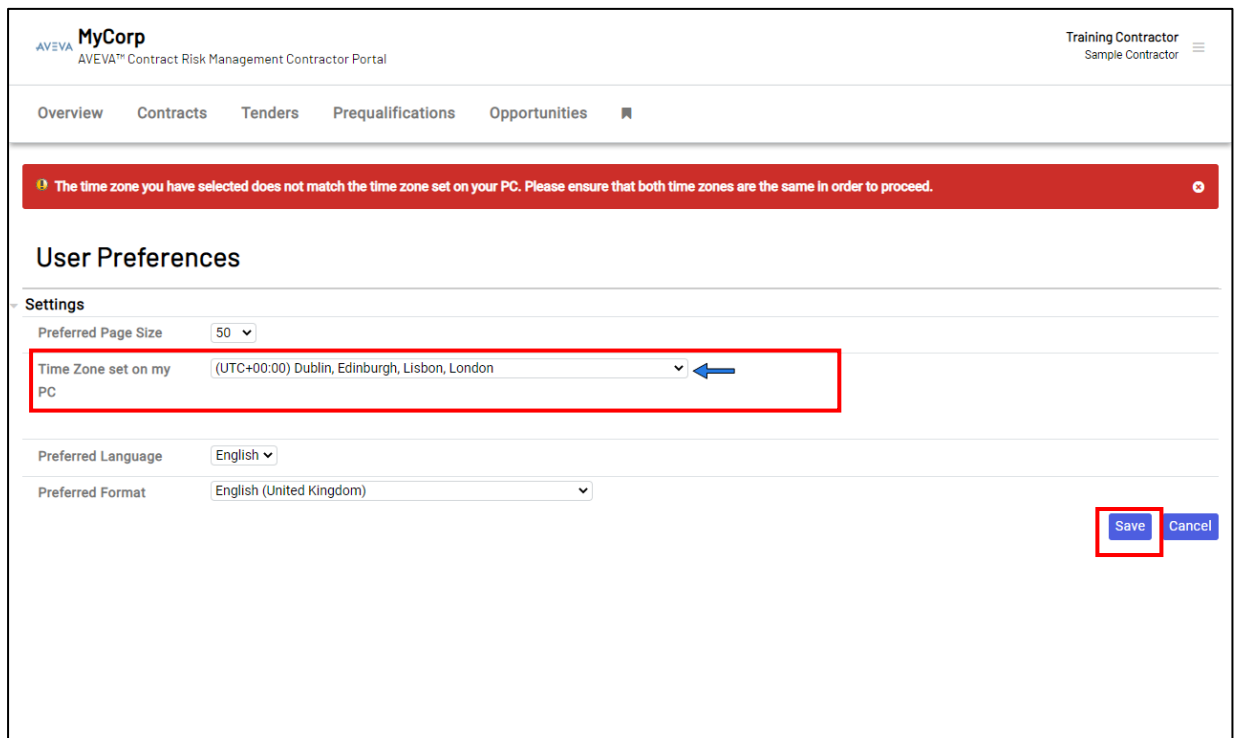3. Your browser window should now display as illustrated below:
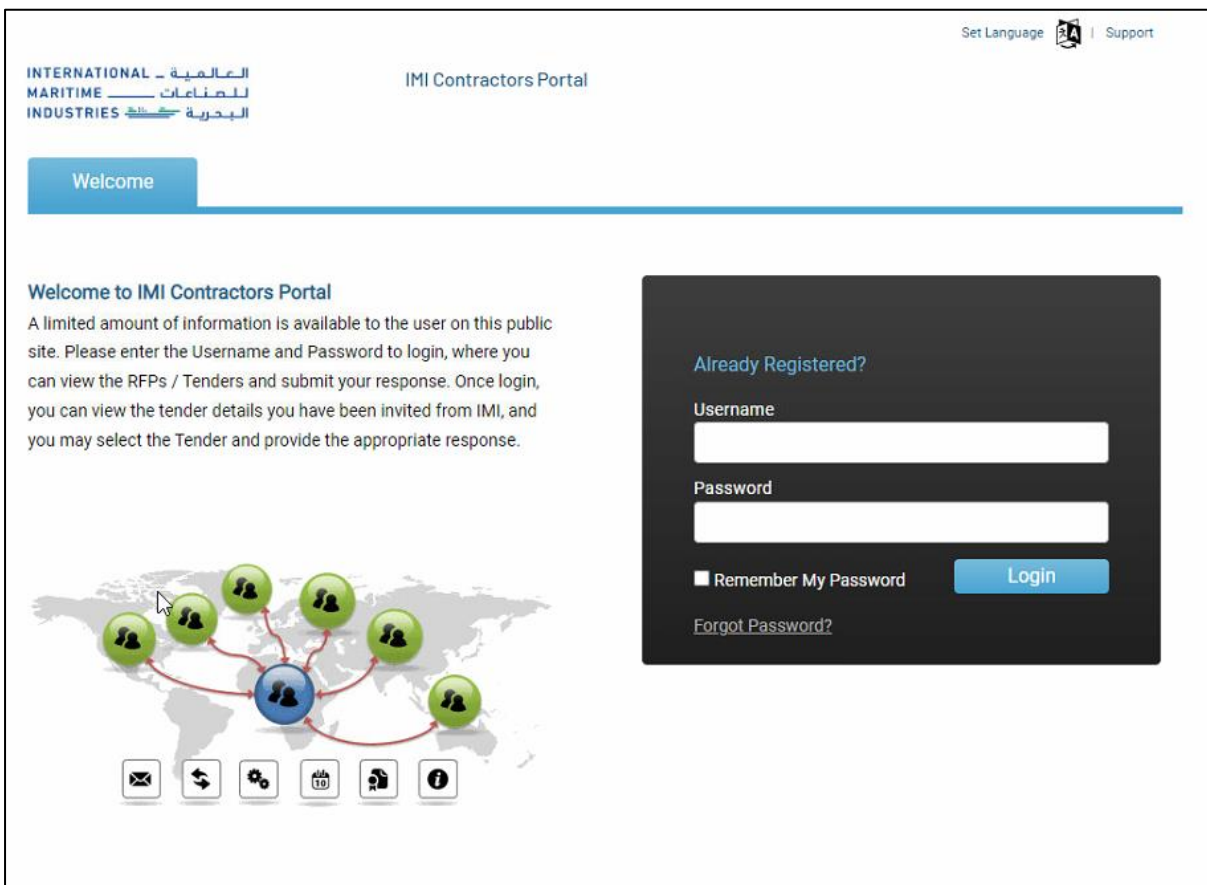
4. Enter your CRM Username and Password
5. Click the Login button

6. The first time you login to CRM, you will be asked to change your password. You need to enter the password provided by IMI and then enter a new password. The password must contain between eight and fifty characters. These characters must include at least one uppercase character, one lowercase character and one digit. After entering and new password click the '**Submit**' button.

7. If the time zone you are in, is not the same as the one recorded against your user details you will be prompted to update your time zone settings to match that of your computer. Make the necessary changes in a '**Time Zone set on my PC**' field and click '**Save**'.

8. You will now see a page similar to the one illustrated below. If you wish to proceed you need to accept the '**Terms of Use**' by selecting the '**AVEVA Terms and Conditions**' check box and clicking the '**Accept**' button, followed by clicking '**Submit**'.

9. Once you have accepted the '**Terms and Conditions'** and adjusted your time zone you will see a page similar the one illustrated below confirming you have successfully accepted the CRM Terms of use.
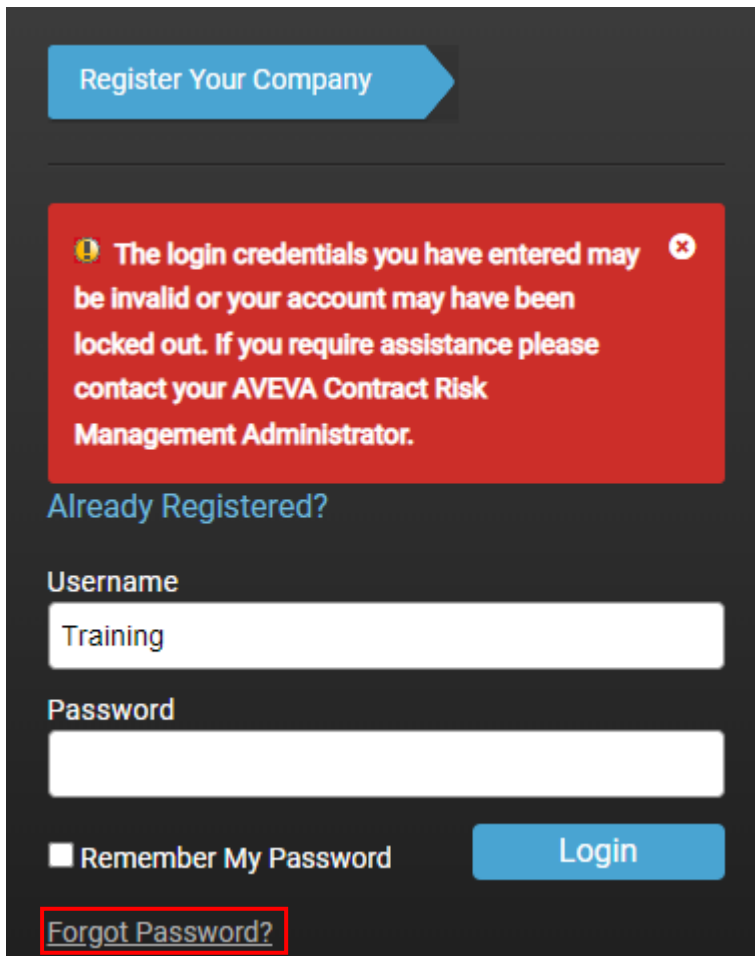
2.2.   Incorrect / Forgotten Password

If you enter an incorrect or have forgotten your password, you will see the below message on the CRM welcome screen.

If you have entered your login credentials incorrectly, re-enter your details, taking care to enter the information correctly.

If you have forgotten your password, you can request a password reset.

To request a password reset, select the '**Forgot Password?**' Link

The Forgot Your Password? page is displayed.

1. Enter your '**Username**' in the Username field.

2. Enter your '**Email Address**' in the Email field.

3. Click the '**Submit**' button.

A Confirmation message is displayed confirming your request is being processed.
You will receive a CRM generate email containing a clickable link, that will enable you reset your password.

2.3. Requesting a Password Reset

The '**Reset Password**' page is displayed.

4. Enter your new '**Password**' in the Password field

5. Re-enter your new Password in the '**Confirm Password**' field

6. Click the '**Submit'** button

A Confirmation message is displayed confirming your password has been updated successfully.
Enter your username and new password to login into CRM.
When you logon after your password has been changed you will be prompted to update your new password. This is a security feature.

> Note: Passwords must contain between eight and fifty characters. These characters
>
> must include at least one uppercase character, one lowercase character and one digit.

After updating your password click '**Submit**'.
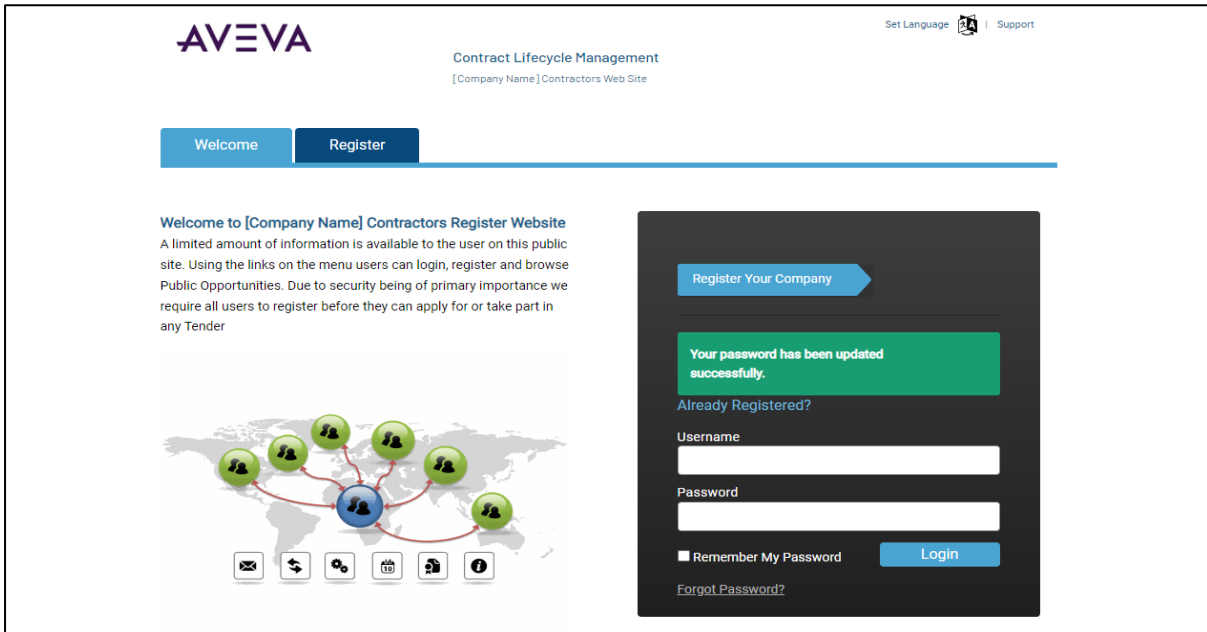
2.4. Account Disabled

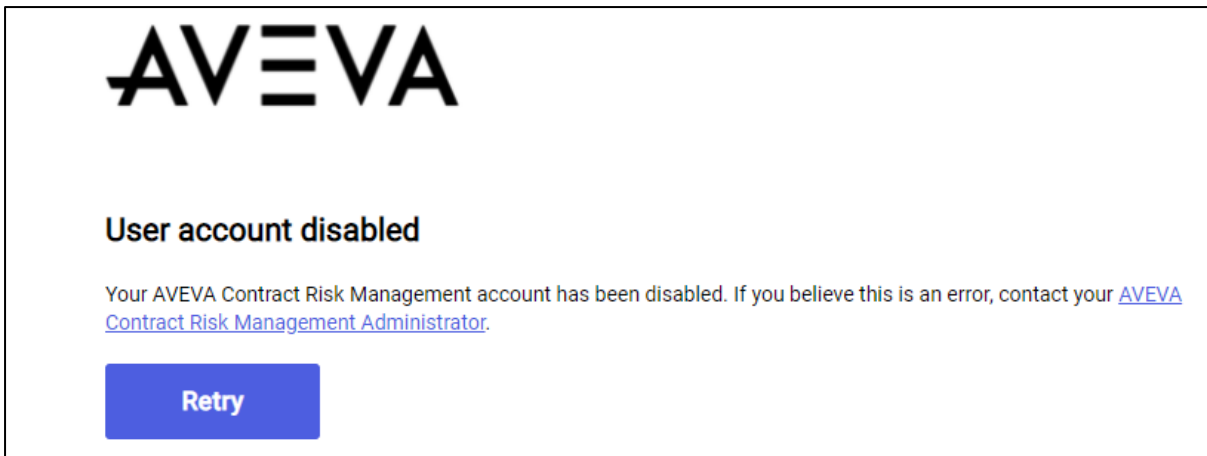If your account has been disabled, CRM will display the below error screen.

Your account can be disabled due to the following reasons:

- You have been locked out because too many attempts have been made to log in to your account with an incorrect password. This is a security feature to prevent a dictionary attack from gaining access to your account.
- If your account has been manually disabled by a colleague who is the Primary Contact or by a CRM Administrator.

You can attempt to unlock your account, by changing your password by requesting a password reset. *See Section 2.3 - Requesting a Password Reset*

Alternatively, your CRM system may have been configured to automatically unlock your account after a specified time has passed, e.g., thirty minutes. In this case, try logging in again after this time period has elapsed.

If you are still unable to log into the CRM solution, contact CRM Support - there is a link to the Support contact details at the top of the page.

2.5.   If you have forgotten your username

Your username shall always be the first part of your email address (example: john.doe@anywhere.com meaning the username is 'john.doe') unless otherwise communicated by your respective RFP contact person within IMI.

An Email communication will be sent out to provide you with your access details. The end user is responsible to ensure safe keeping of that email.

In the event you forget your username, please send an email to your RFP contact person within IMI.

3. Navigation Within CRM

3.1. CRM Menu

This section will explain how you move from one module of CRM to another, in order to access key functional areas, how to initiate actions and maintain your navigation trail.

Your CRM interface has a number of important areas as illustrated in the image below:

The '**Menu Tabs**' provide you with the ability to move quickly to the areas of CRM in which you wish to work.

The '**Main Work**' Area makes up the largest section of your CRM interface and contains the key dynamic information relating to the subject area you are working on.

This is the area where you will interact most with CRM.
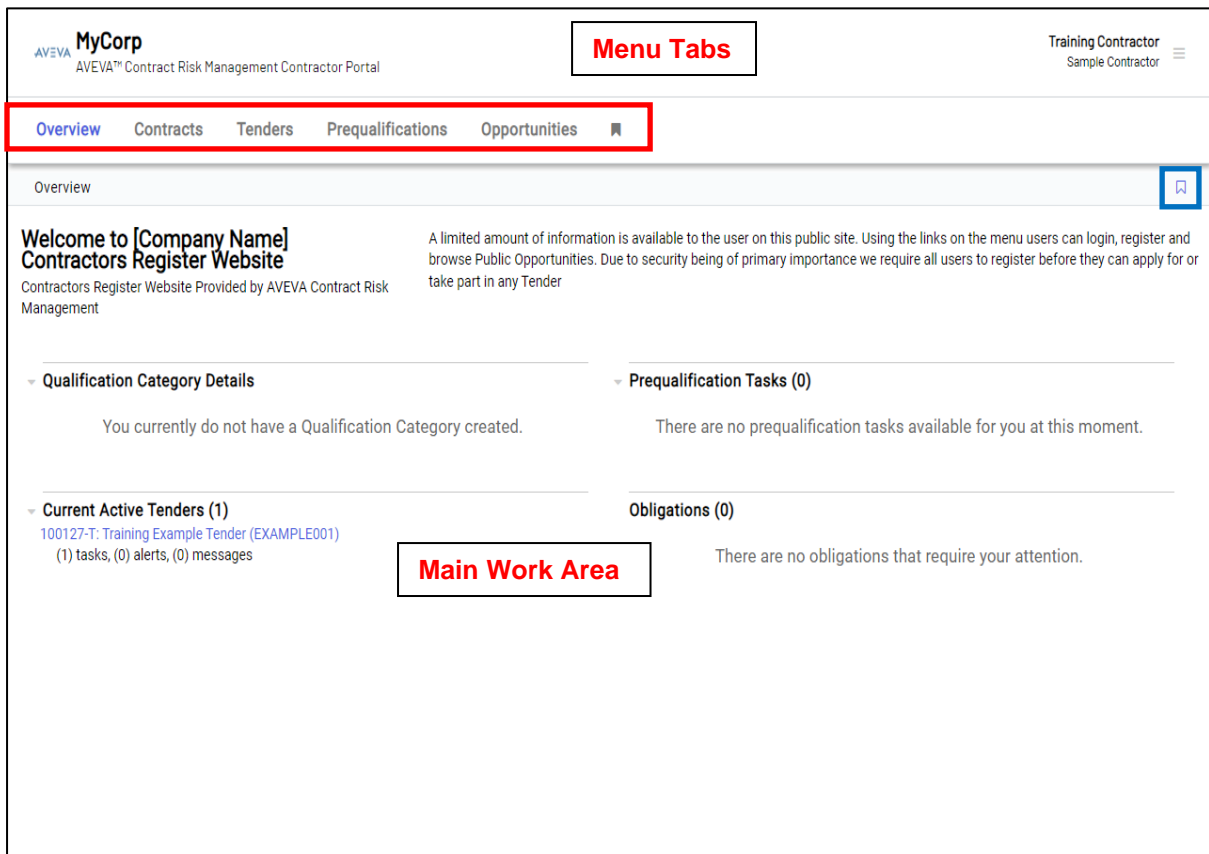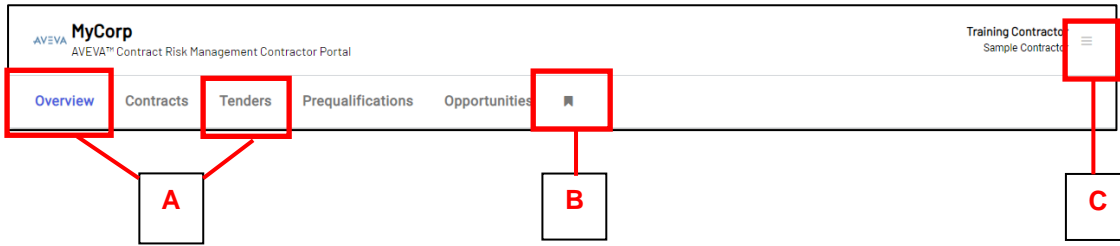
Header Section	
A	Tabs to support navigation. Overview and Tenders used for online bidding.
B	Return to your preferred home page. Set using Make my home page icon highlighted in blue in the previous screenshot.
C	Access Display User Menu (options shown below).

| Display Menu Section	
D	Name/Company of user currently logged on
E	Access CRM Online Help
F	Log off from CRM
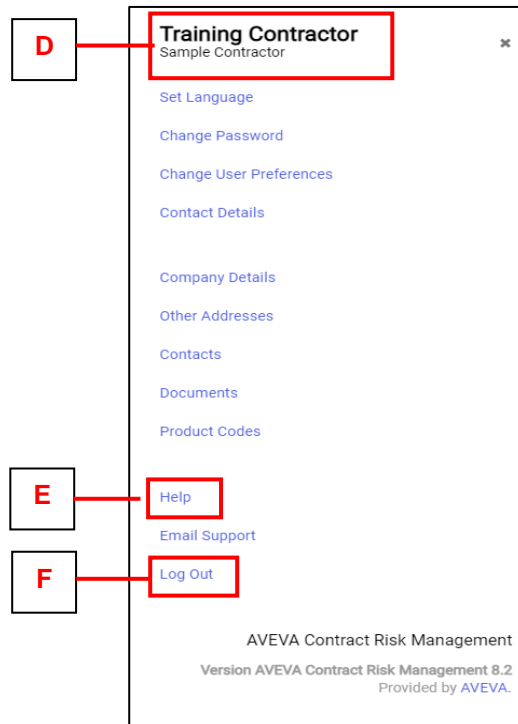
CRM uses '**Menu Tabs**' to enable you to easily move from one module to another in CRM. This is achieved by simply clicking on the menu tab corresponding to the module/area of CRM you wish to access.

Clicking on a tab will highlight the chosen tab and change the view in your main work area to the home page of the CRM module as illustrated in the screen below:
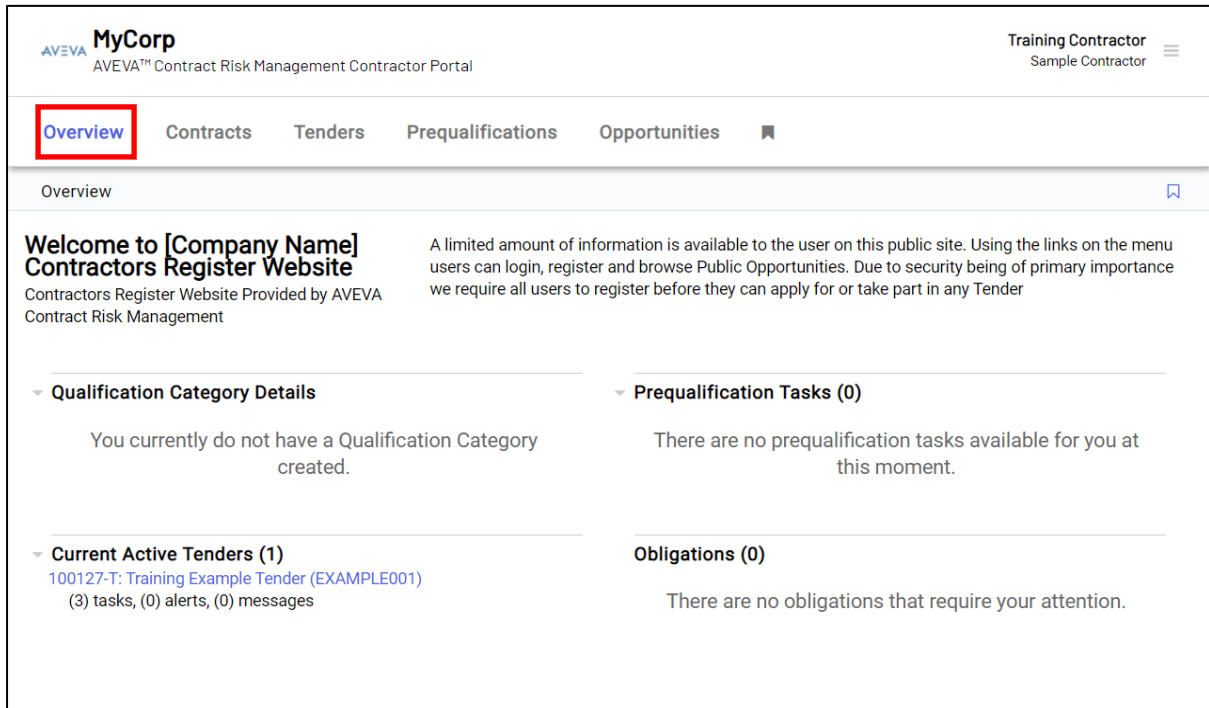
A useful navigation system entitled '**Breadcrumbs**' is used throughout CRM. Breadcrumbs maintain an automatic navigation trail record as you move deeper into a CRM module. This enables you to easily ascertain how you arrived at the point you are at within CRM, and more importantly, how to work your way back to where you started as illustrated in the screen below:
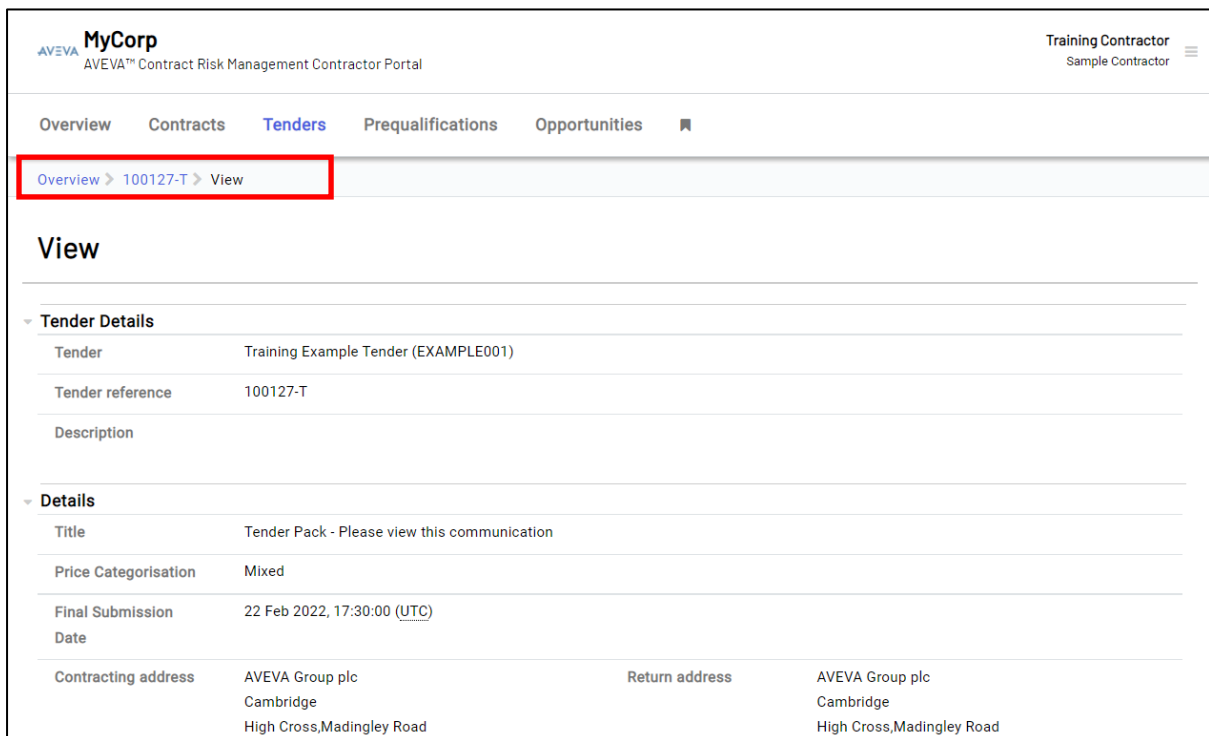
### 3.2. Accessing CRM On-line Help

CRM's Online Help functionality is available on your CRM user menu. This provides you with step-by-step instructions for carrying out tasks in all areas of CRM. CRM Online Help is Context Sensitive. When a user accesses the CRM Online Help, the CRM Online Help opens at a topic relating to the action the user is trying to perform.

To access CRM Online Help:

1.　　　Click the '**Display**' User Menu Link' highlighted below to open the menu.
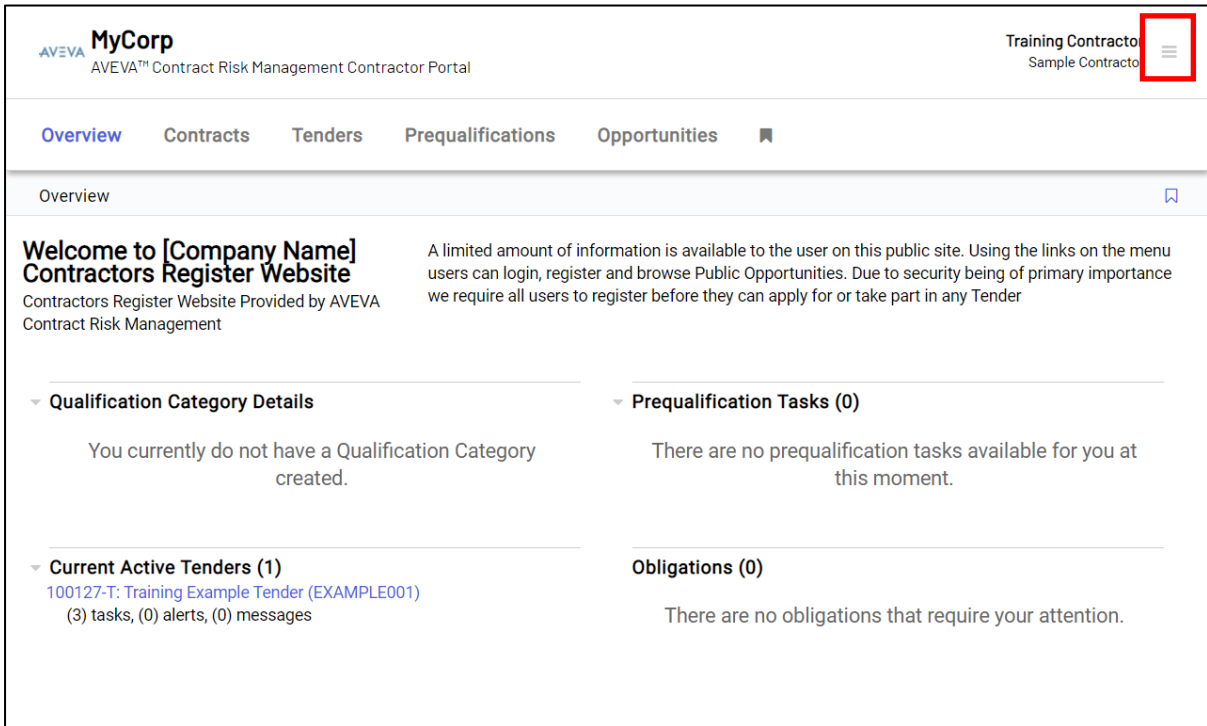
2.　　　Click the highlighted 'Help' link:
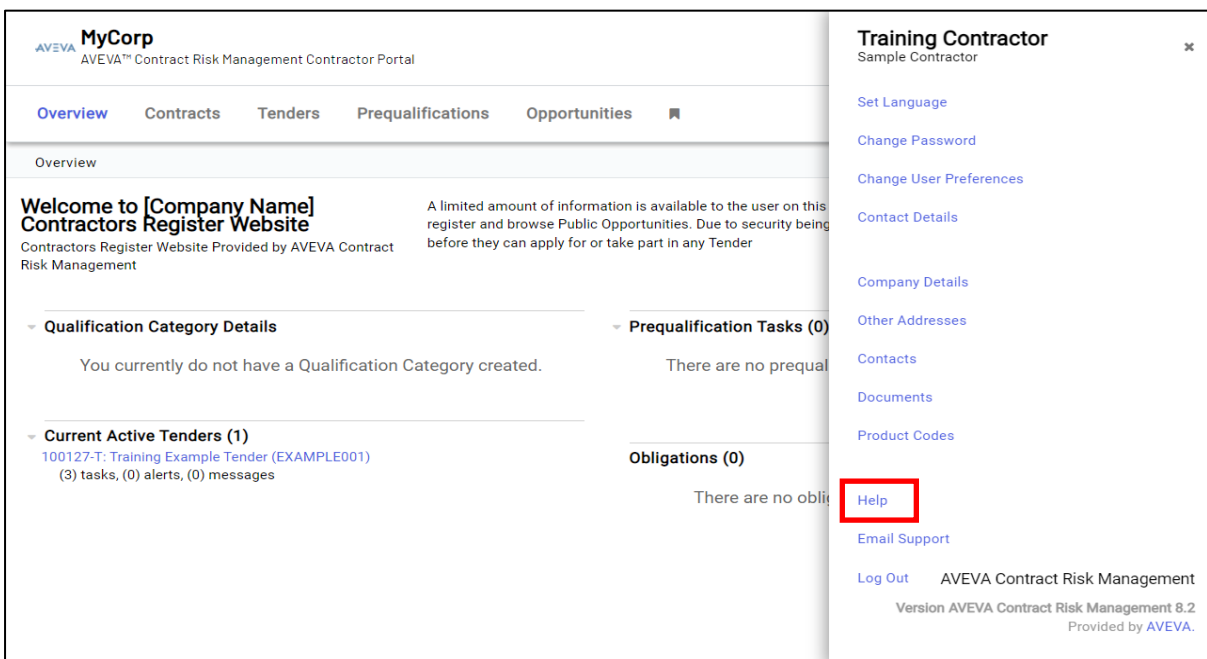
3. You will be presented with a new browser window containing the CRM Online Help content as illustrated below. The CRM help feature is case sensitive. This means, help will be provided relevant to the task you were attempting to perform when accessing the CRM help.
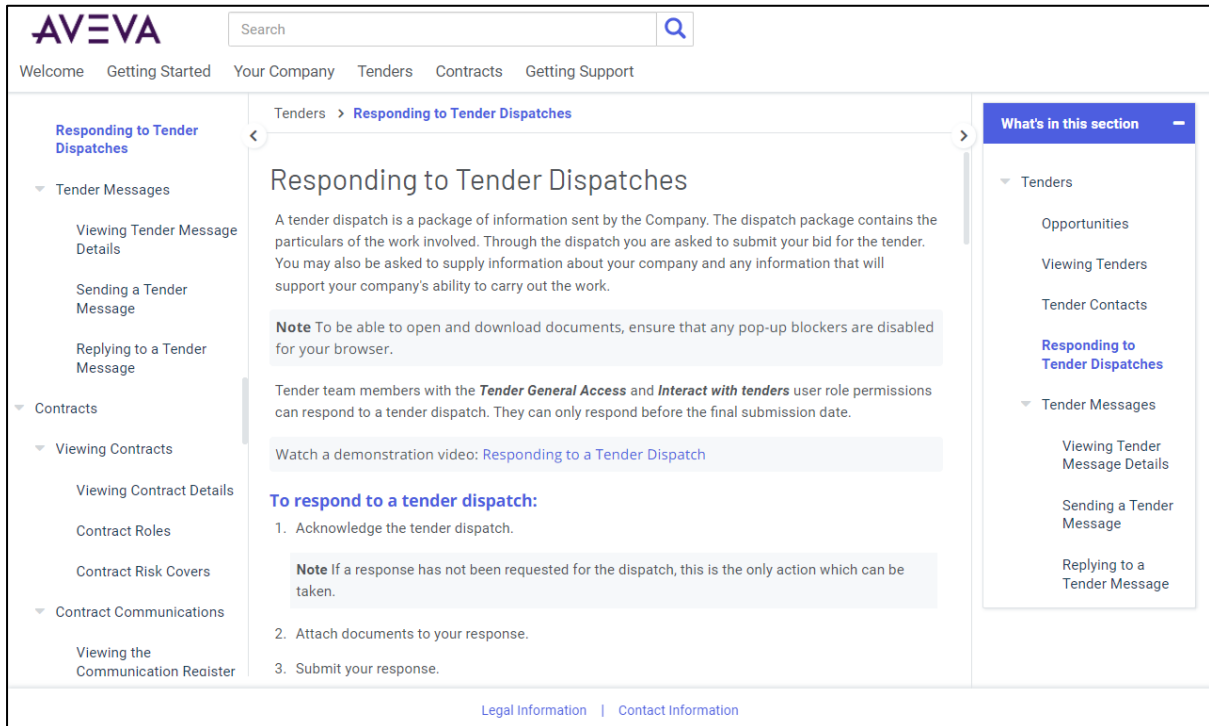
1. Enter your search criteria for the topic you are looking for assistance with.

2. Click 'Search'.

3. Navigate the side bar to the left of the page to find help on various CRM related topics.

4. Click the quick access links in the '**What's in this section**' pane to get help on the topic(s) from the initial search.
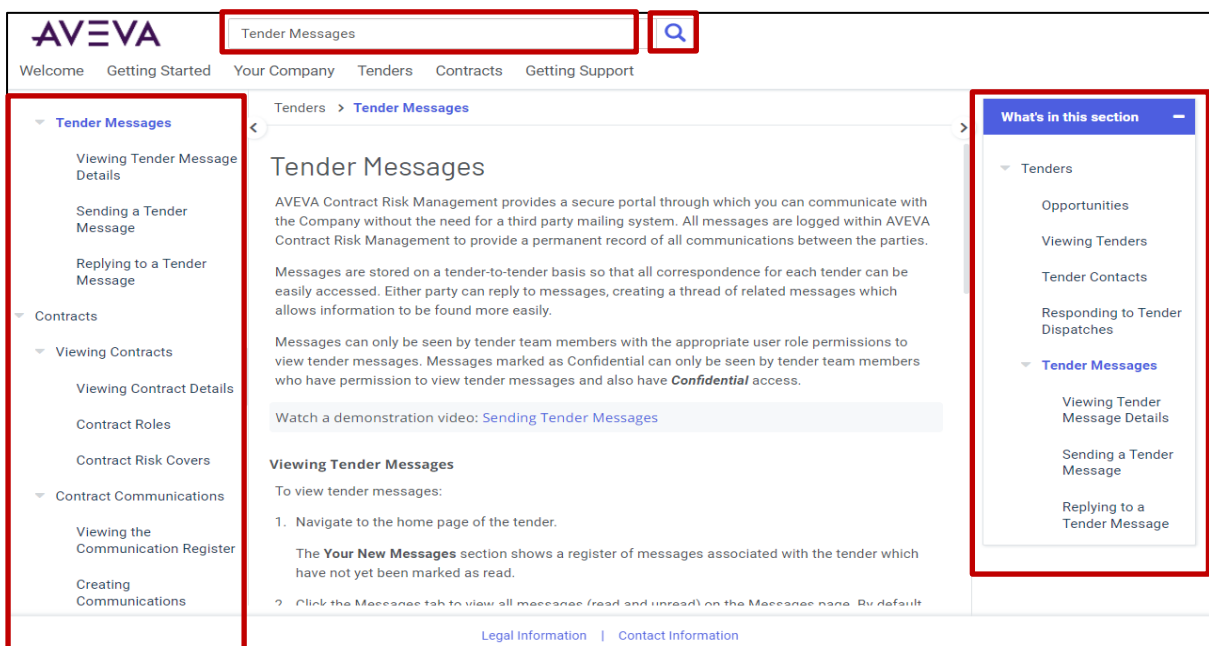
3.3. Accessing the RFP Package

To access the RFP package login to CRM.

By default, when you login to CRM the '**Overview'** page is displayed. If a different page is displayed, this means you have changed your homepage setting to display another page. In this case simply click on the '**Overview**' tab to access the overview page.

Active Tenders(s) are listed under in the '**Current Active Tenders (1)'** section.
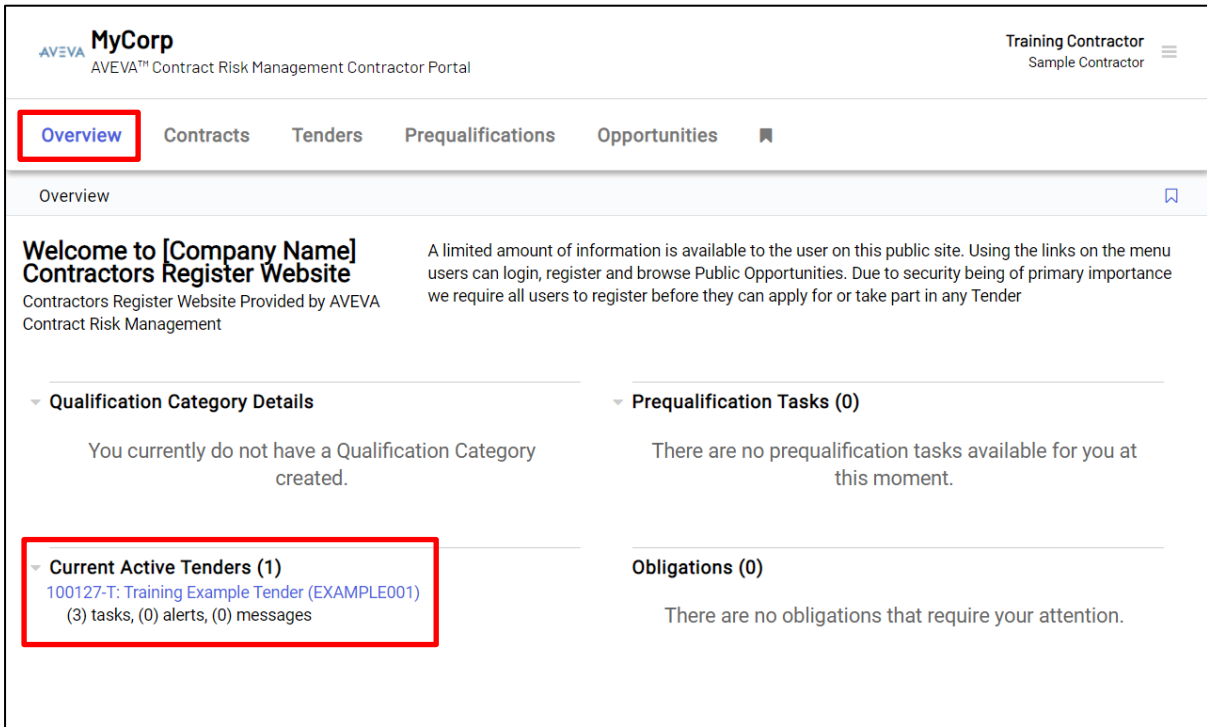
Clicking a Tender link under '**Current Active Tenders**' will bring you to the home page for that Tender page.
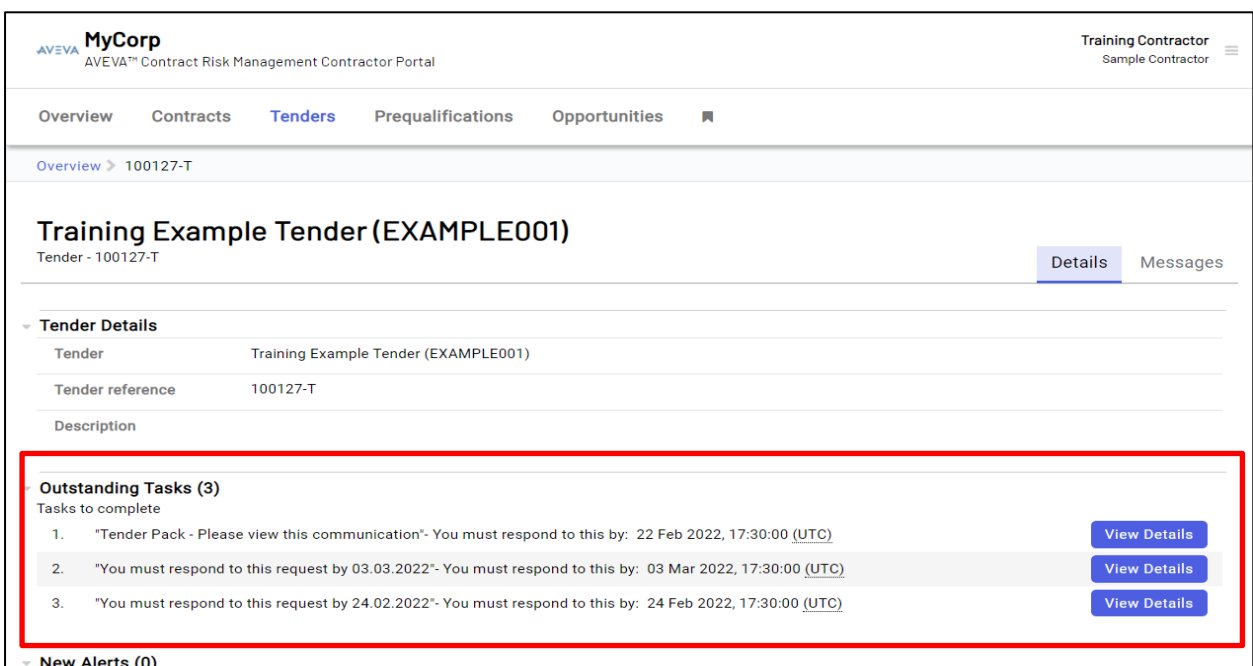
Under the '**Outstanding Tasks (X)**' section click the '**View Details**' button

1. The first task "RFX/ITT" or "Tender Pack" will allow you to download the RFP package.
2. The second task allows you to acknowledge that you plan to submit technical documentation and then submit the documentation before the submission deadline.
3. The third task allows you to acknowledge that you plan to submit commercial documentation and then submit the documentation before the submission deadline.

4.   Receiving & Viewing a Tender Invitation

You will first be notified of the invitation to tender via an email. This will be sent to your standard email Inbox.
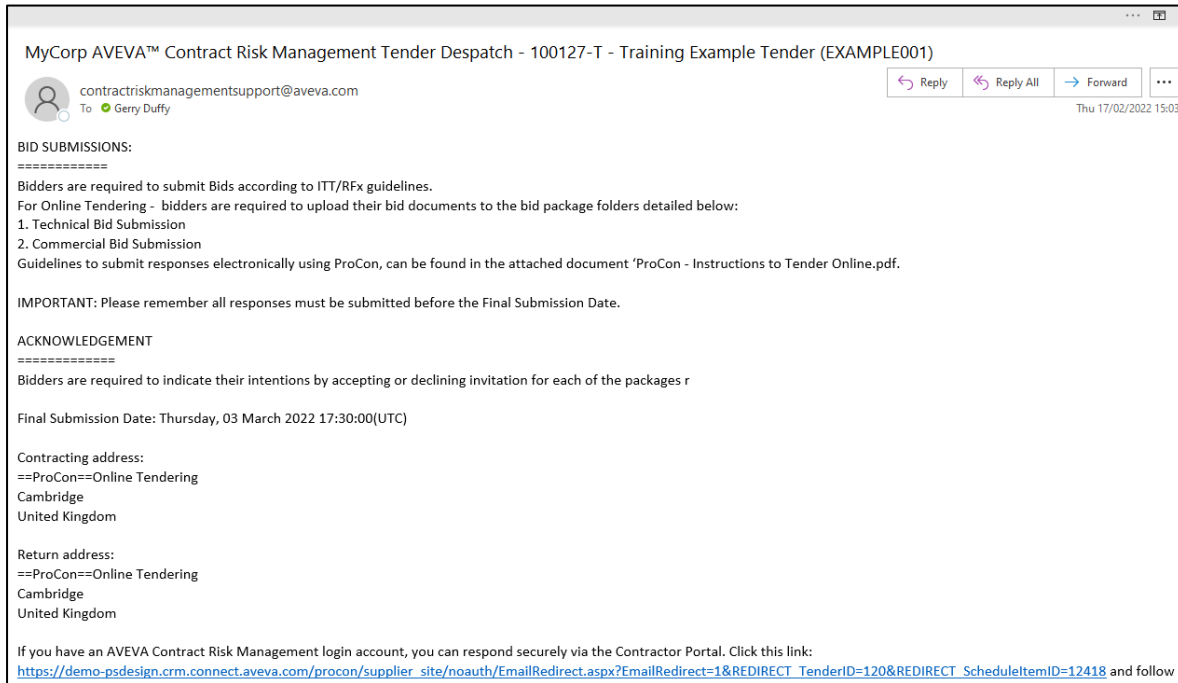
Note: Only the nominated Single point of contact for the Company will receive the RFP invitation from IMI.

The email provides the following information

Tender details	The Tender Reference & Tender Name
General Info	General Tender Information
Final Submission Date	The date and time at which submission of tender responses needs be completed. **No submissions will be taken after this date and time**
Contracting Address	This is the address pertaining to the organisation or department whom the eventual bidder awarded the contract will be contracted with
Return Address	The Return Address is to be used only if advised by IMI tender administrator to submit non-electronic bids. Instructions are provided as per Part I Request for Proposal – Article B PROPOSAL INSTRUCTIONS.
Hyperlink to Response Area within CRM	**Clicking on this link** will take you to the log on screen where you can download the tender documents

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5.   Obtaining Tender Documents

When you receive an RFX/ITT notification, follow the link in the email (Previous Step) and logon to the CRM solution, you will be brought to the '**View Despatch**' screen.

You are now viewing the despatched Invitation to Tender from IMI.

You can download the tender documents by clicking on the '**Download**' buttons. This will prompt your browser to open an option that allows you to save the chosen document to your PC.

Note: The tender documentation will appear in a pop-up window. Please remember this if you are using pop-up blocking software. have any difficulty in downloading the documents, please contact your IT department to adjust Internet Browser setting appropriately.

After downloading the documents and deciding whether you will respond to the Tender Invitation and creating your response documents, please follow the instructions in *Section 6 How to Respond Electronically to an Invitation*

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6.   How to Respond Electronically to an Invitation

To respond to the invitation electronically follow the link at the bottom of the Technical or Commercial Tender invitation email you received from IMI and login into CRM.

Once you are logged on to the solution you will be taken to the Invitation to Tender.

Alternatively follow the process outlined in *Section 3.3 Accessing the RFP Package* of this document and click the relevant '**View Details**' button shown in Tender section.

This will bring to the page shown in the image below.
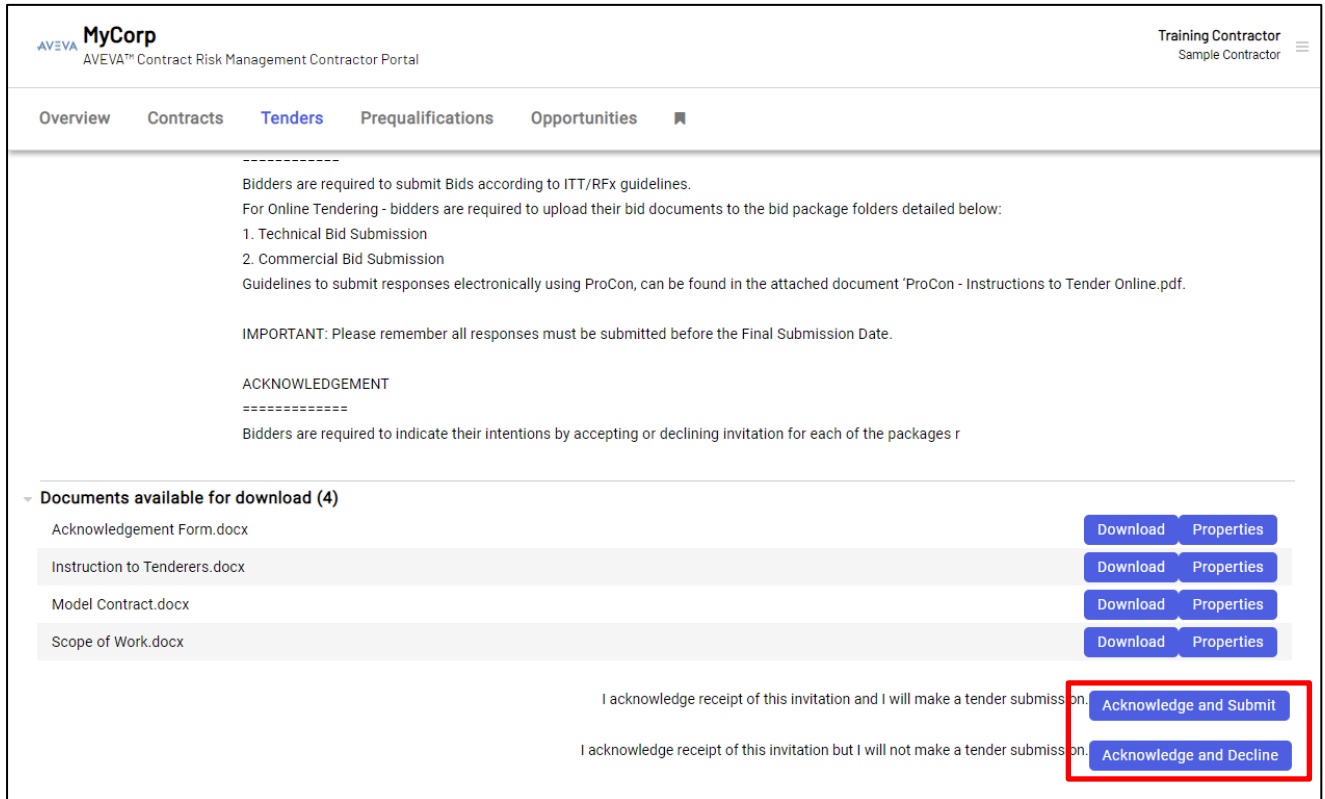
Initially you will be provided with two options '**Acknowledge and Submit'** and '**Acknowledge and Decline**'.
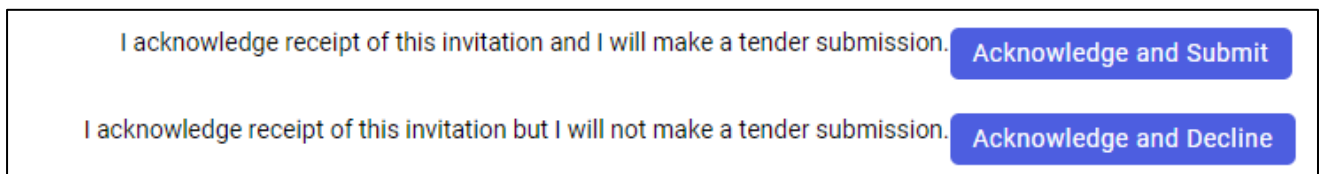
6.1.   How to Acknowledge and Agree to a submission

'**Acknowledge and Submit**' – Select this option so that you can submit a tender response. This will acknowledge your receipt of the invitation and inform IMI of your intention to submit a bid proposal.
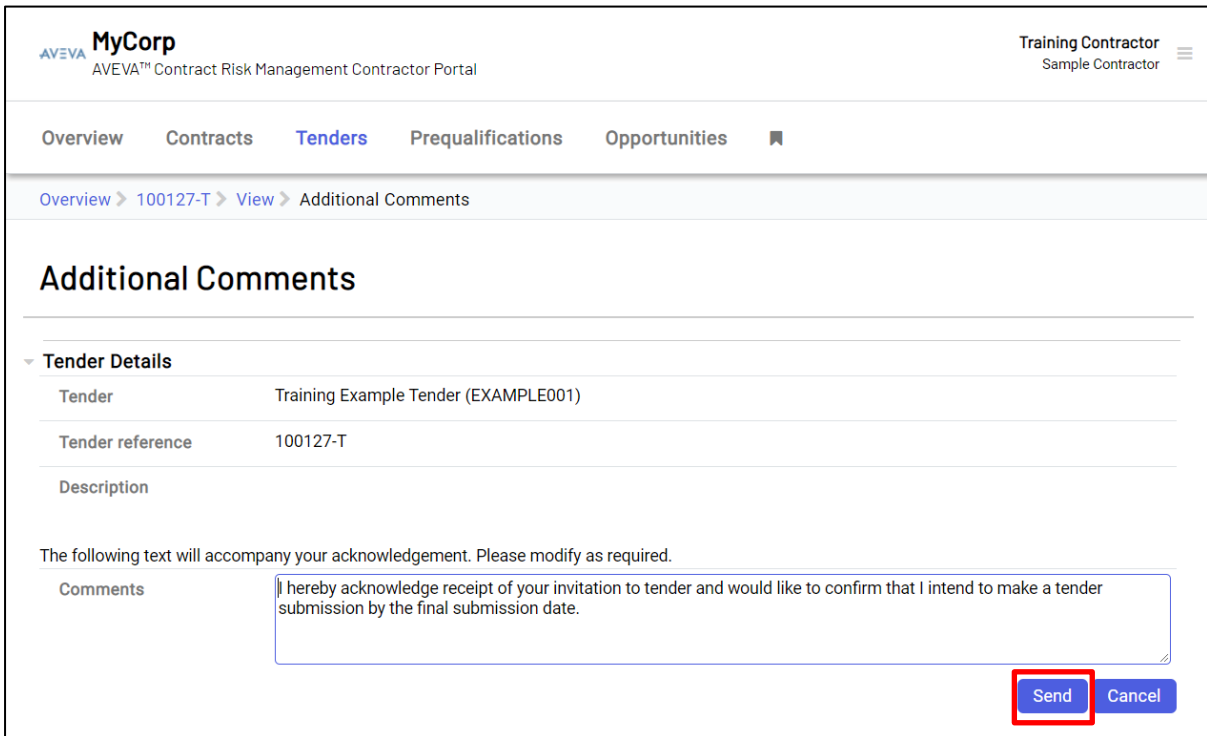
When you agree to submit a bid by clicking Send in the above page the system takes you back to the Tender page and shows your acknowledgement as being successful.
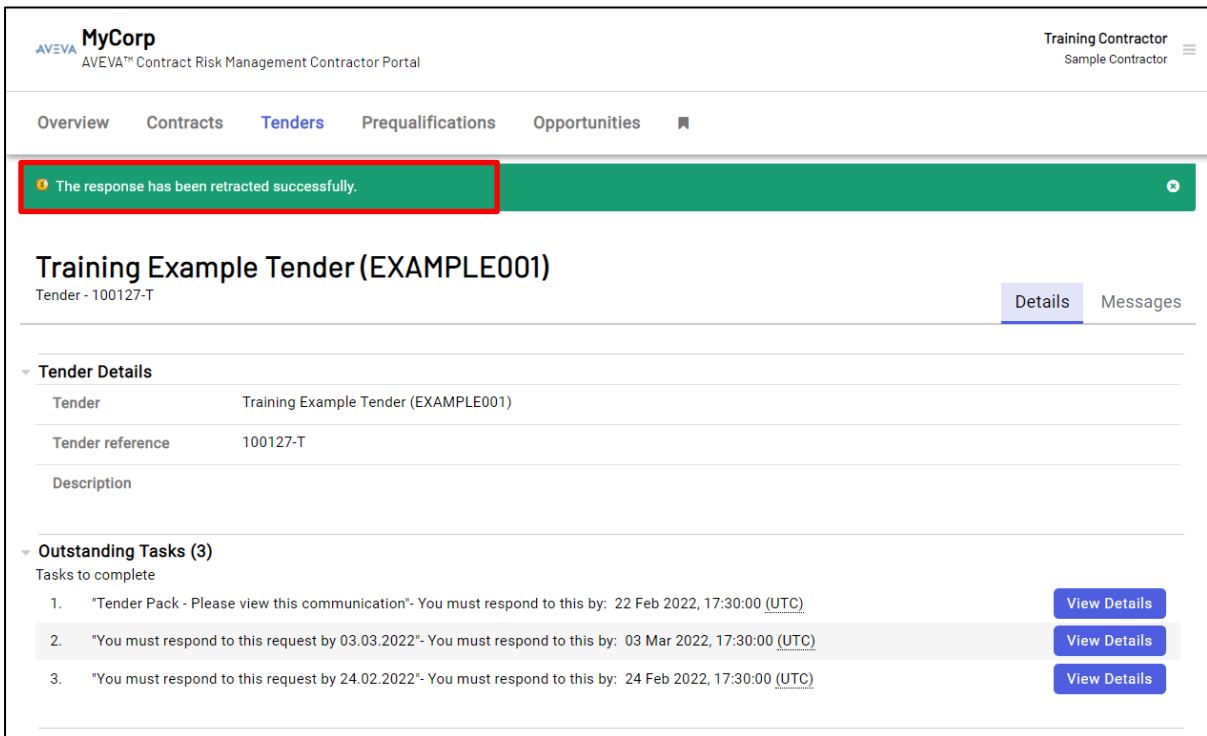
6.2.   How to Acknowledge and Decline a Submission

'**Acknowledge and Decline'** – Select this option if you wish to withdraw from the tendering process.
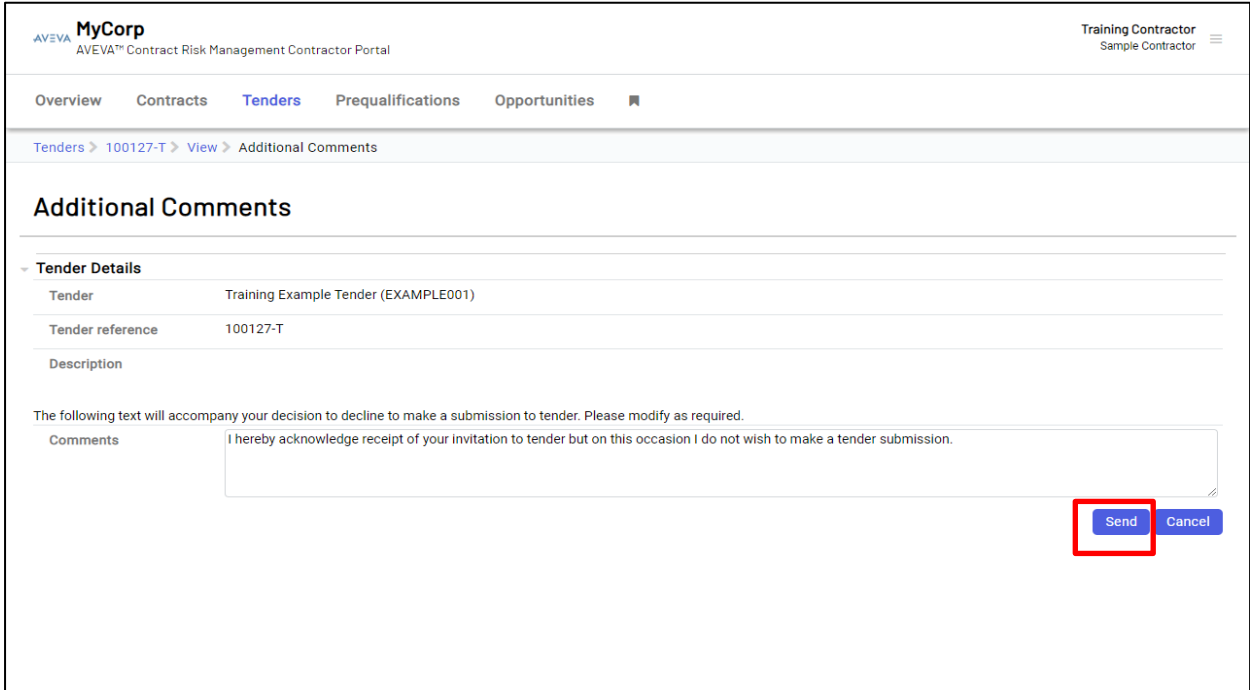
When you click on the 'Send' button to decline a proposal request, the CRM solution takes you back to the Tender summary page and shows that you are declining to take part in the tender.
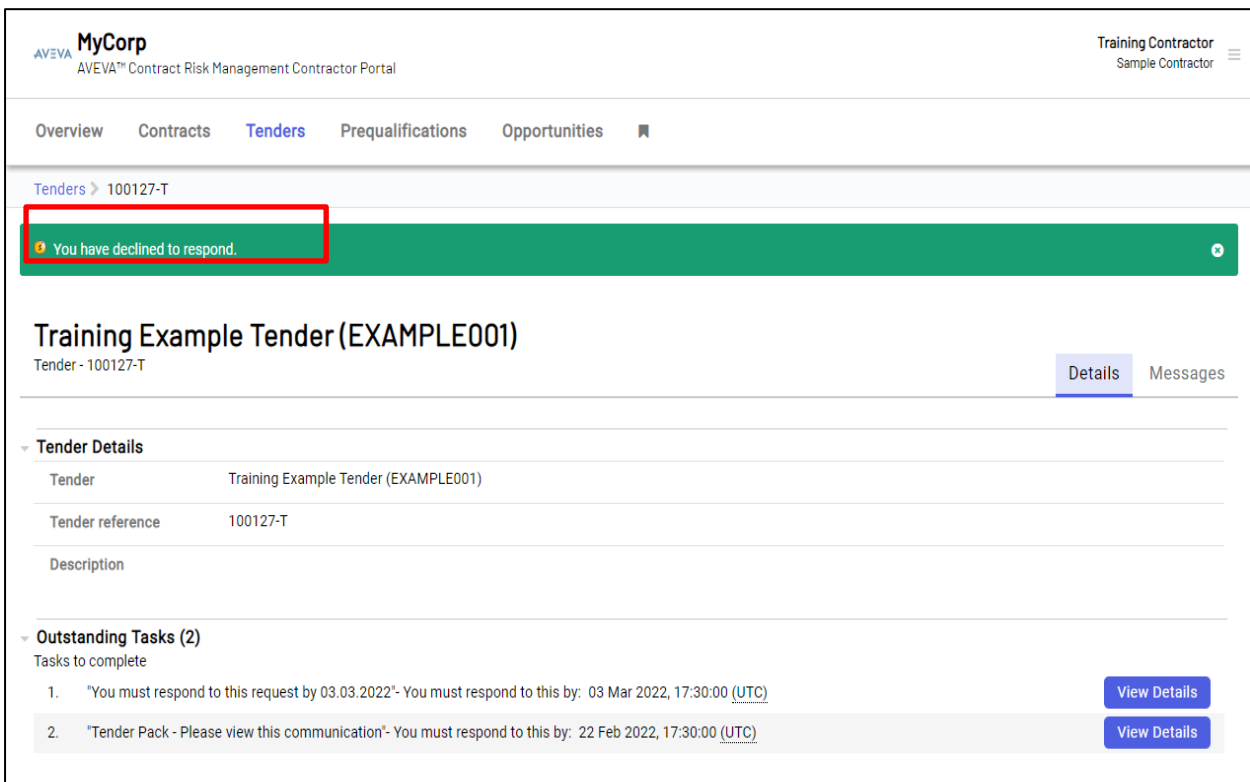
7.   How to Raise Clarification Requests / Tender Messages

7.1.   Login to CRM

Login to CRM with the Username and Password you received via email. Once logged in, you will be taken to the '**Overview**' page of CRM. In the 'Current Active Tenders (s) section all tenders relevant to your organisation are displayed.

7.2.   Send a Tender Message(s)

Under the '**Current Active Tenders**' section select the tender for which you want to send a tender message.
Alternatively, select the '**Tenders**' tab page and select the tender you want to create a message for.

Note: The number of tenders listed will be relevant to the number of tenders your organisation was invited to participate in.

7.3.   Compose a Tender Message

Click the '**Messages**' button.

Click the '**Create Message**' button.
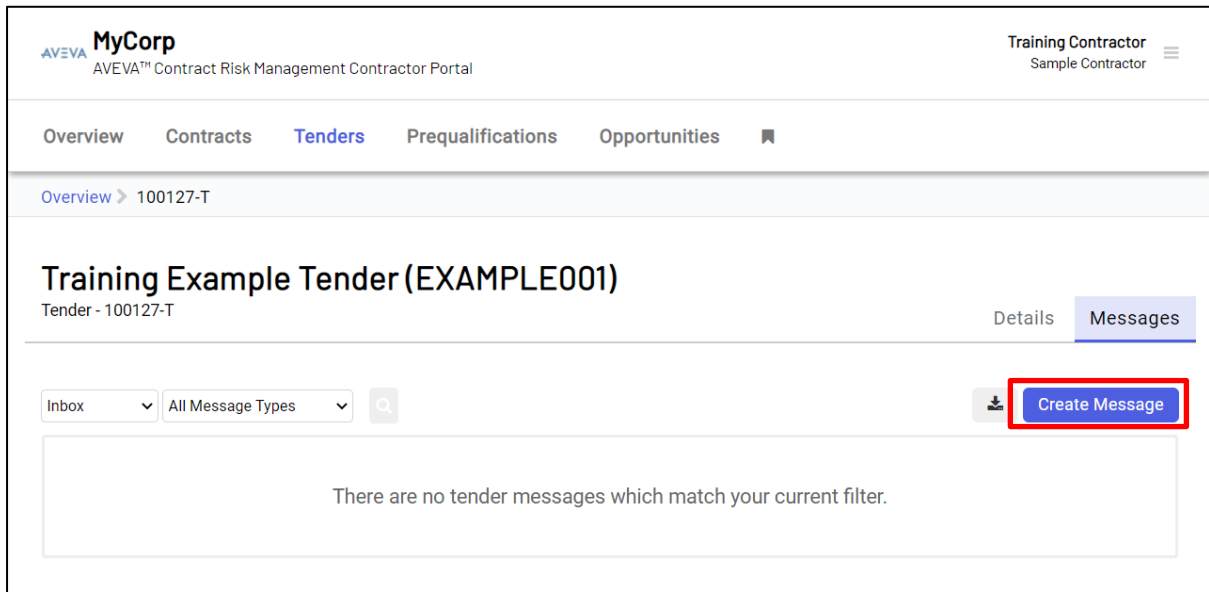
Complete the details of the message. Attach any document(s) as required.
Click the '**Send**' button to send the message to the company.
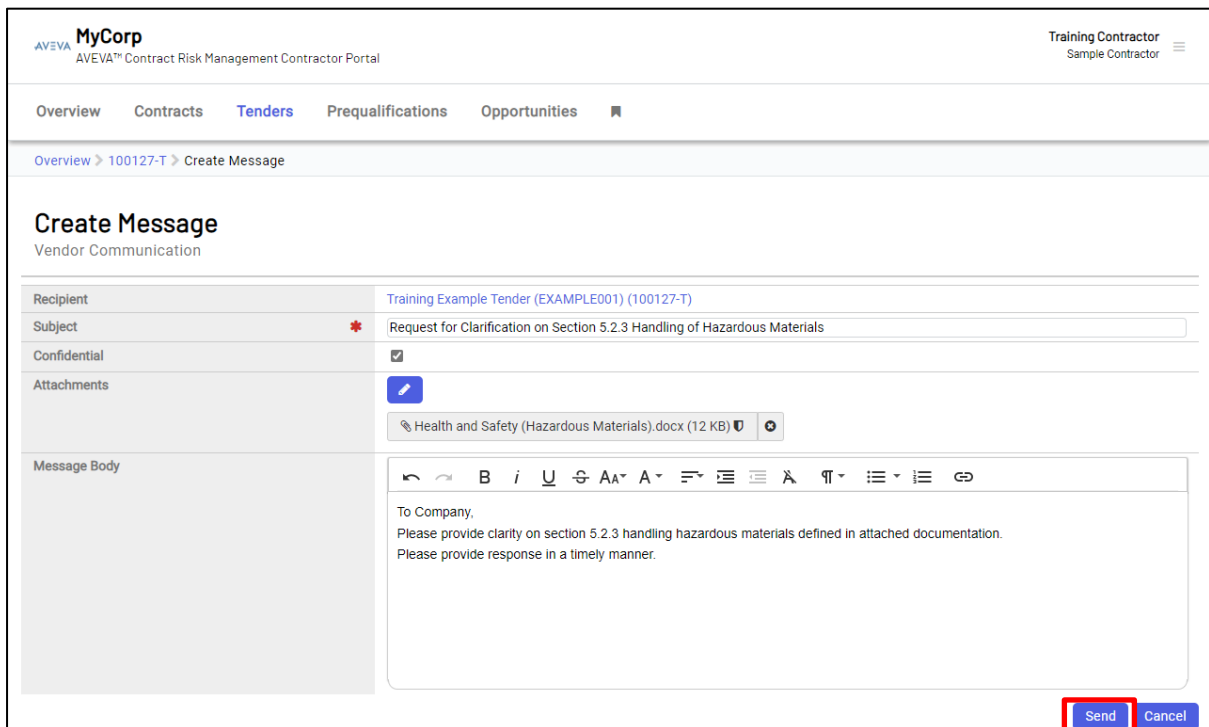
After clicking the '**Send**' button, a popup message is displayed.
Click the '**Confirm**' button if you wish to proceed.
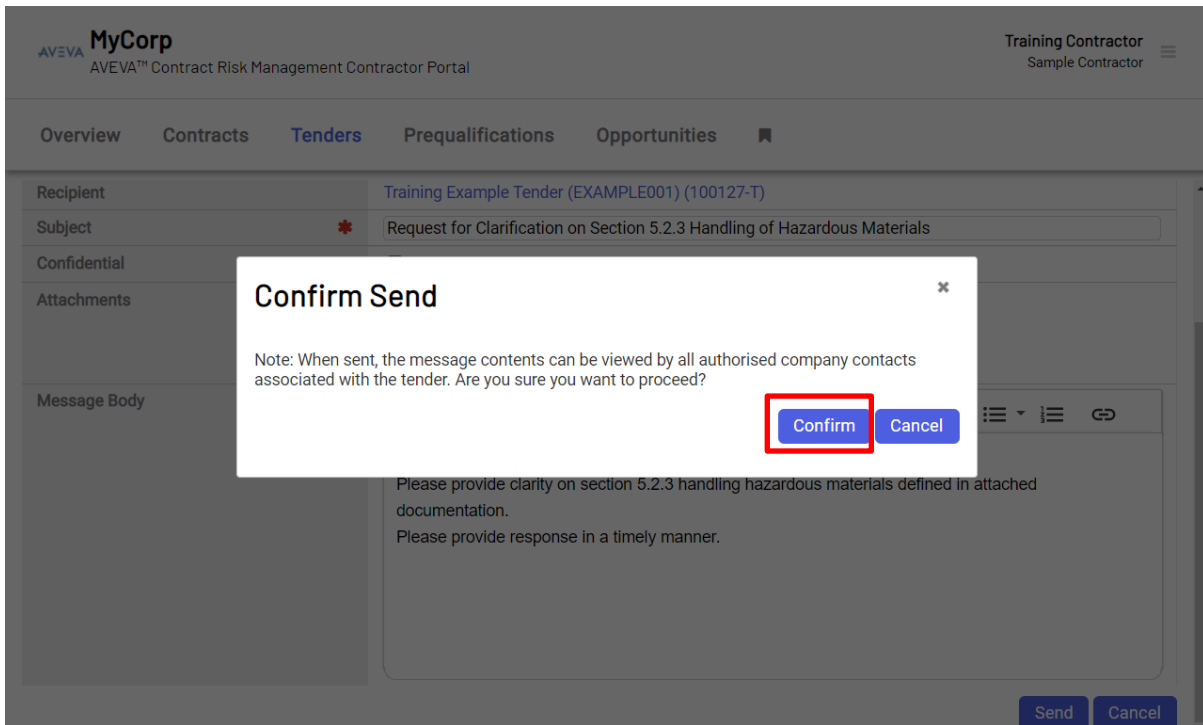
A confirmation message is displayed confirming the message was successfully published to the company.
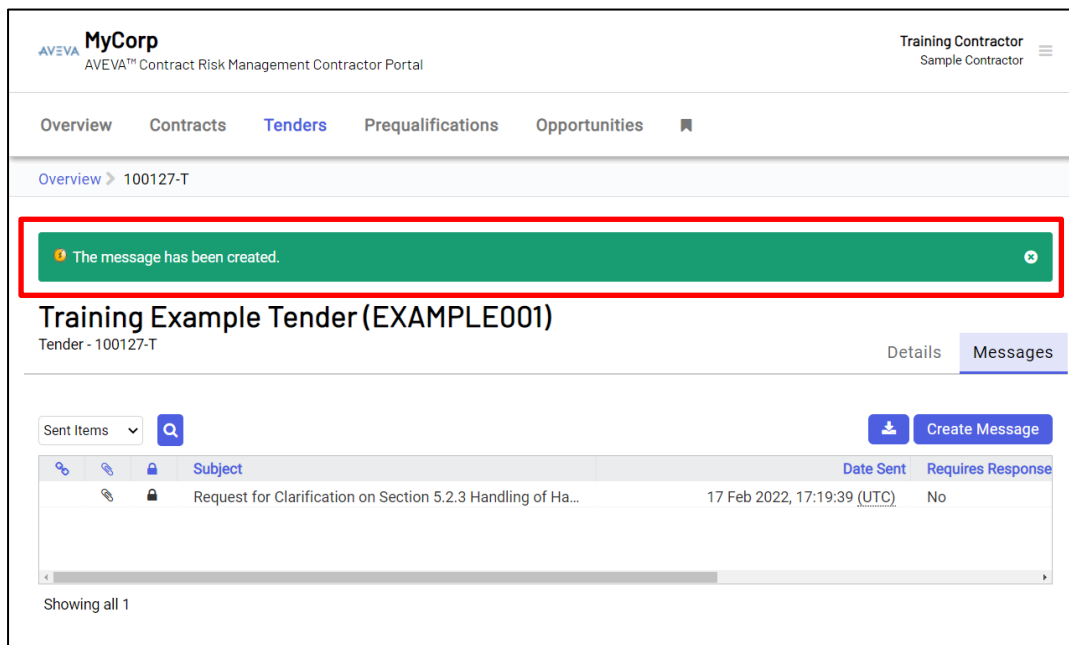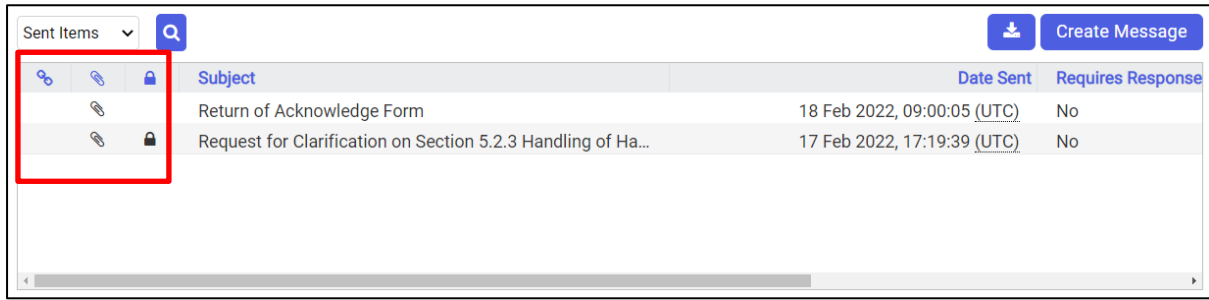
7.4.   Viewing Tender Messages

Click the '**Messages**' tab to view all messages (read and unread) on the messages page. By default, the inbox is displayed. Messages can be filtered by, All, Inbox or Send Items.
Click on the '**Subject**' of the message to view that message.
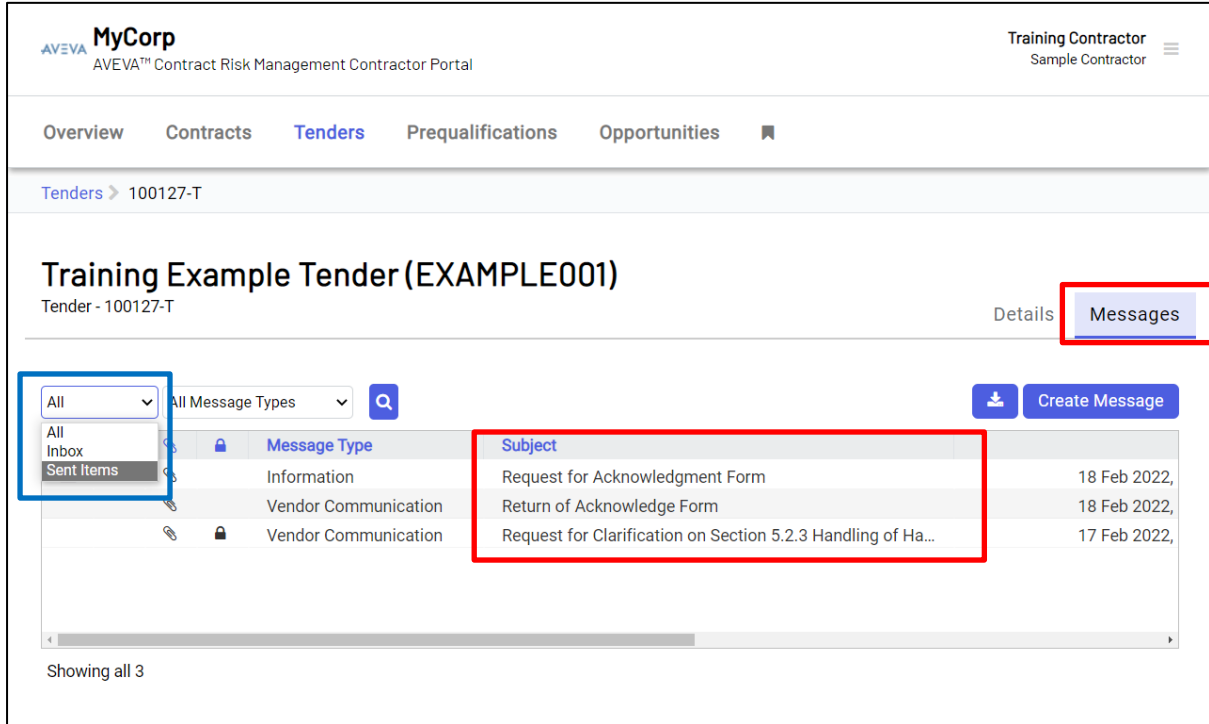
- Messages that have not been categorised as '**Unread**' are assigned a closed envelope icon. ✉

- Message marked as '**Confidential**' are assigned the locked padlock icon. 🔒

- Messages containing an '**Attachment**' are assigned the paper clip icon. 📎

Note: When a message is marked as read, the closed envelope icon is automatically removed ✉

8.   How to View Tender Messages sent from the Company

When supplementary tendering material in the form of tender messages has been issued, you will receive an email alert with a link attached like the one shown in the image below.

To view the message, click the link within the message body. You will be prompted to login to CRM and automatically directed to the message.
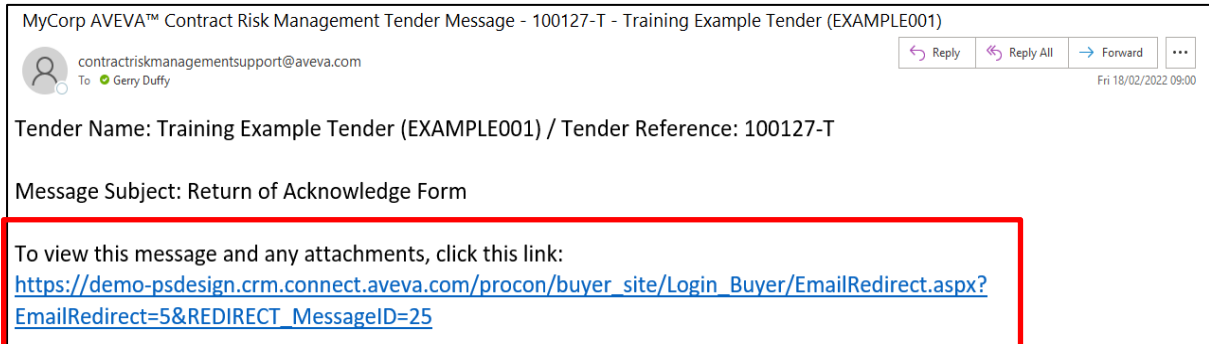
To reply to a message, click the '**Reply**' button.
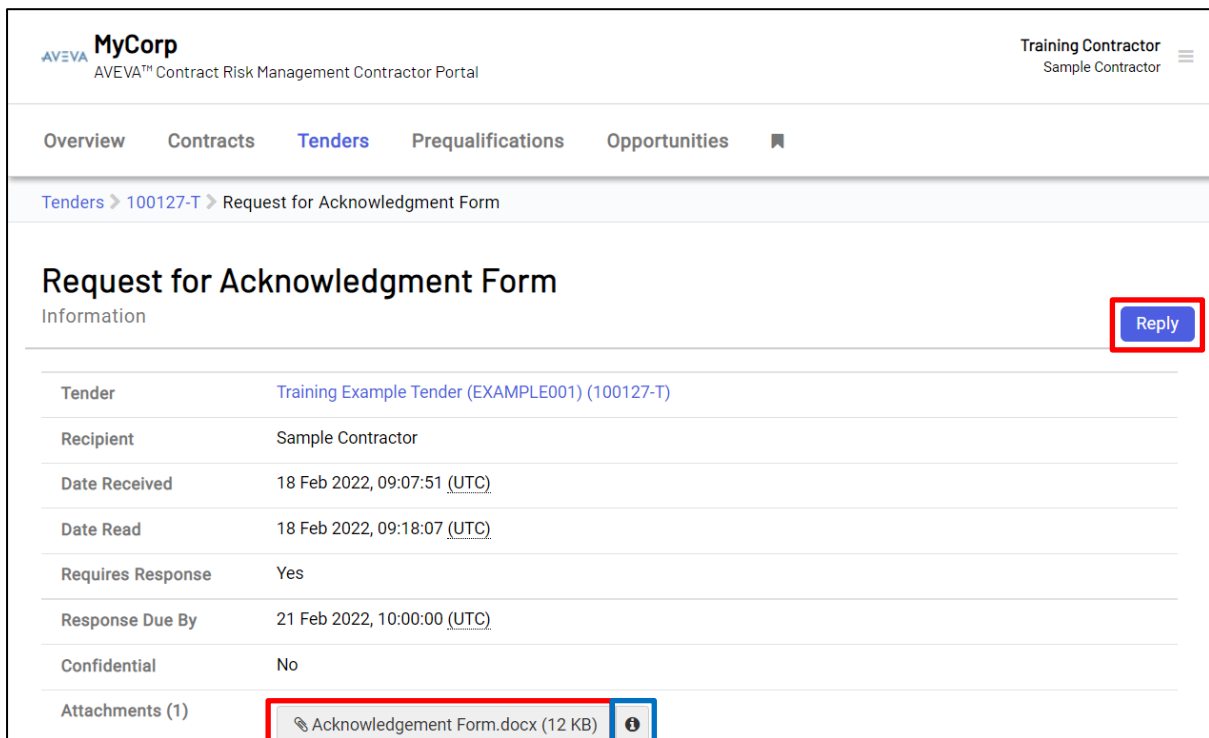
You can open and save attachments by clicking on the attached file.

You can download the file by clicking on the ⓘ '**View Attachment Details**' Icon.

9.   How to Submit RFP Responses Electronically

When you are ready to submit your bid response document(s) follow the link provided in the Tender Invitation email, and login into CRM. Once you are logged on to the solution you will be taken to the Tender Invitation Response Area.

Alternatively follow the process outlined in *Section 6 - How to Respond Electronically to an Invitation* above*. This will bring to the page shown in the image below:

1.   Select the '**Ready to Proceed now**' button

2. You will now be requested to upload any documents you wish to submit, as part of your proposal.

   Select the '**Yes**' button to upload these documents.

Note: You can save your submission at any point before the final submission date expires.

This action will store your response for you to work on at a later time, up until the point that you are ready to submit bid proposal.

3. Select the '**Choose Files**' button to locate the document you want to upload as part of your bid submission.
   When all documents are successfully selected, click on '**Add X files**' button to complete the upload.
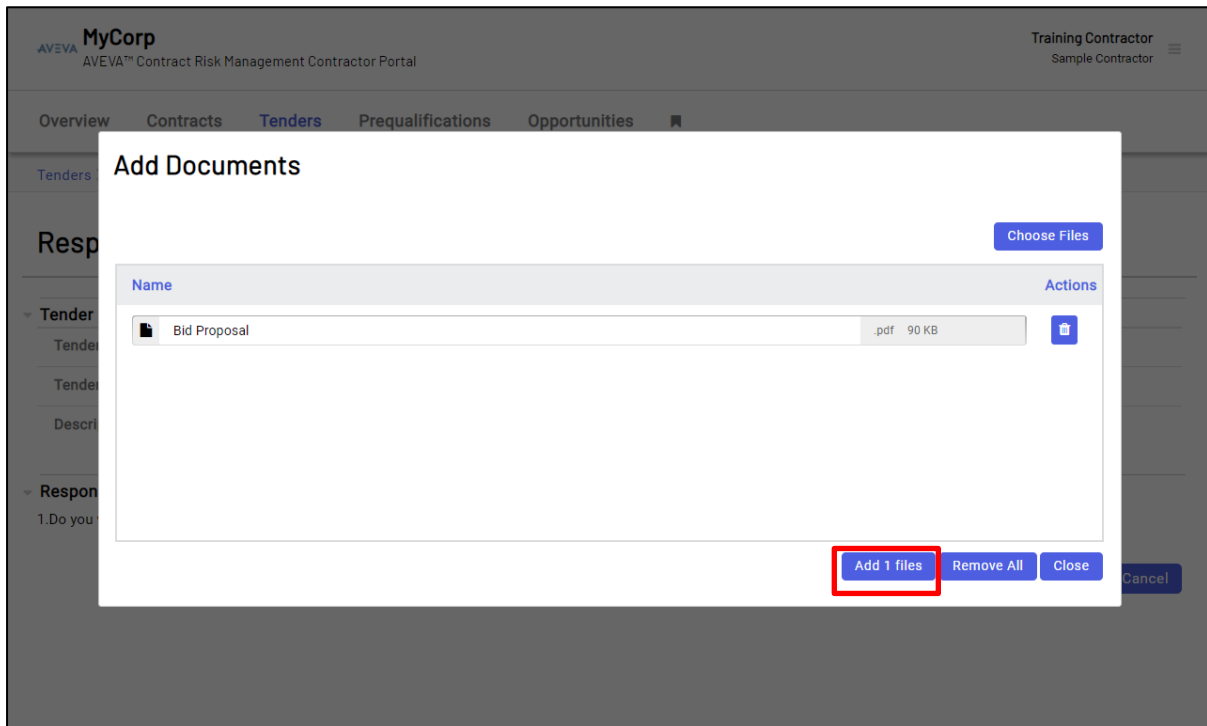
> Note: The name of the file(s) can be updated as appropriate within the Add Documents dialog box.

4. When all documents are successfully selected, click on '**Add X files**' button to complete the upload.
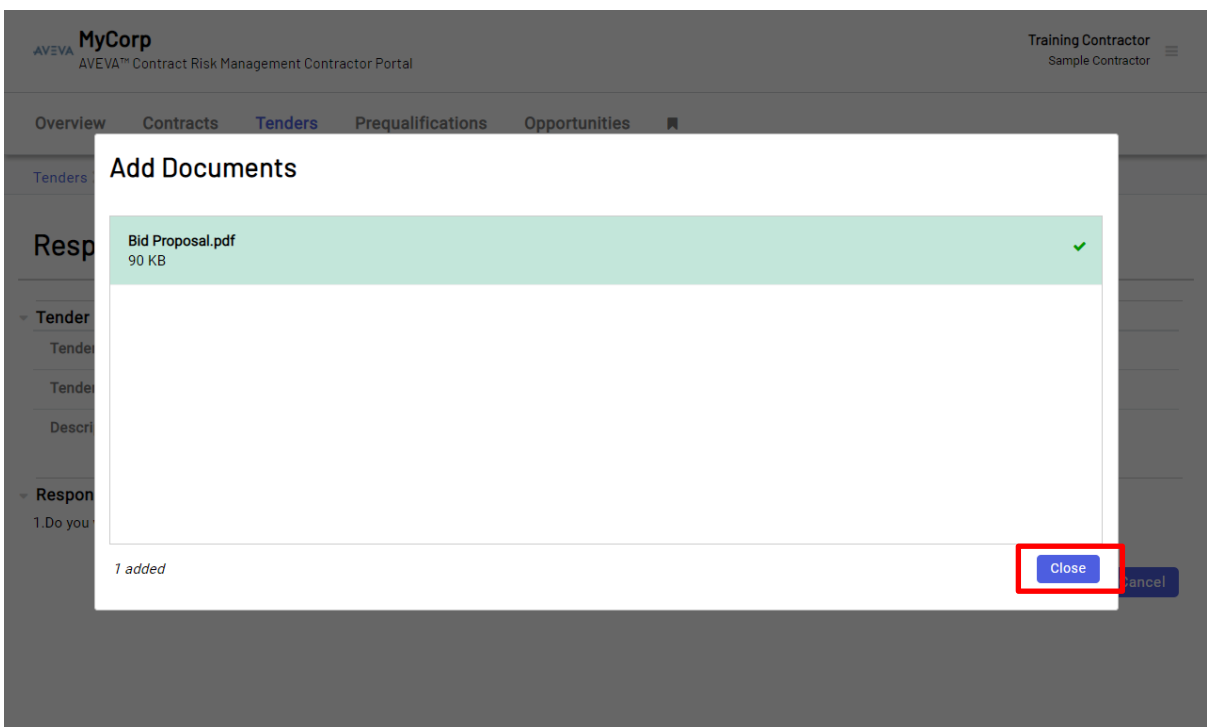
5. Click the '**Close**' button

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6. The document has been successfully uploaded.

> Note: Repeat steps 3 – 5 above to add additional documents to your proposal.

7. Once you have completed added all documents to your proposal, select the '**No - proceed to next step**' button.

> Note: Click the '**Save'** button if you wish to complete the submission at a later time.

8. Select the Submit button to publish your bid proposal to IMI

9. Click Ok to complete your submission

10. Your tender submission has been successfully completed
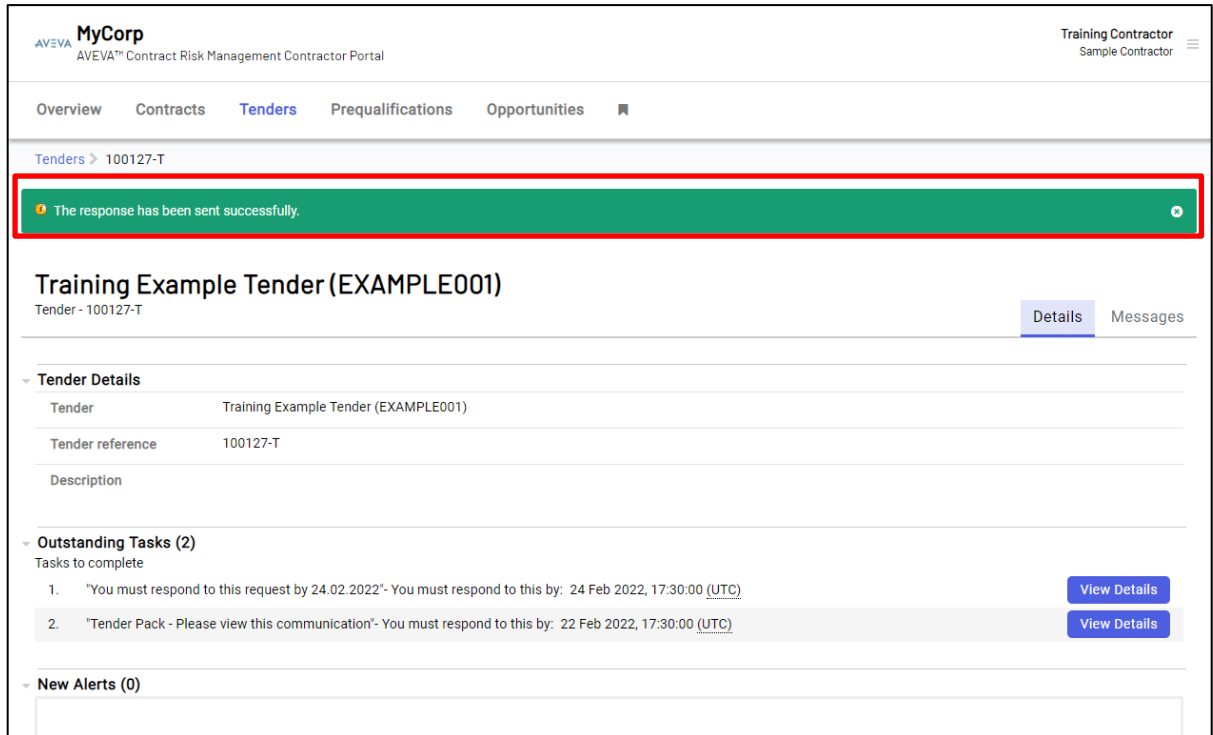
11. You can view your submission documents at any time from the '**Tender History**' area of the '**Tender Summary**' page as shown in the image below. If you need to retract your submission, click the '**Retract**' button.
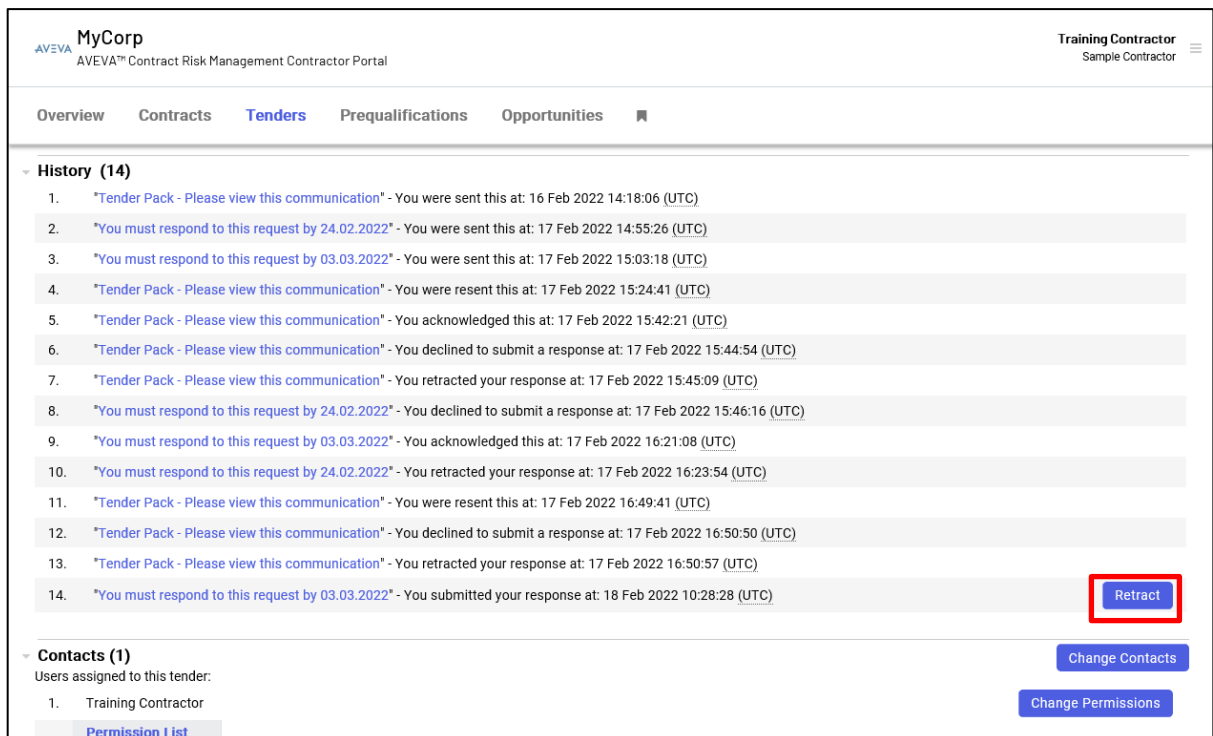
Note: A Response Submission can be retracted up until the Final Submission Date has expired. This will enable you to change your response status. If a submission has been retracted the company will assume that you have made no response to the invitation until such time as the response is re-submitted.

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