

GUIDE TO SMARTPROCURE

SmartProcure is NZDF preferred online portal to engage with suppliers for tendering and Procurement opportunities. SmartProcure is used for correspondence relating to these tenders and opportunities. For technical support please e-mail dcs.vm@nzdf.mil.nz.

1. How should I register my organisation on SmartProcure?

To register your organisation on SmartProcure you must:

1. Browse to <https://nzdf.apa.app.jaggaer.com>

2. Click on the 'click here' link.
Suppliers wishing to participate in NZDF procurement opportunities should [click here](#) to register. There is no charge.
3. Complete the registration form and click on the 'Save' button on the tool bar at the top of the page. Please complete all the mandatory fields marked with a *.
4. You will receive an automated email with your username and a temporary password, once your account has been activated.

Tips and Recommendations for Registration:

- **Email address.** When completing the registration form, take extra care when entering your email address (this email address will receive vital communications from NZDF regarding Tenders for which you have 'Expressed Interest').
- **Temporary Password.** Your registration will go through a compliance check before being activated. Once activated, an e-mail will be sent to you with your username and a temporary password.
- If you do not receive your temporary password, check your junk mail for the automated email.
- **Registration.** Organisations should only ever register **once** on SmartProcure. This initial registration should be at organisation level.
- **Super User.** The individual who registers the organisation on SmartProcure should be the Super User who is responsible for managing the organisation's individual user registrations and tender responses.
- **Multiple email addresses.** Organisations have the option to enter multiple email addresses to ensure that several colleagues receive any communication from NZDF. Please refer to section 'How do I add multiple email addresses to receive communications?' below for further guidance.
- **First time log on.** When each person logs into SmartProcure for the first time, they will be requested to change the system-generated password. They should ensure that they save their user name and new password securely.

2. How do I add multiple email addresses to receive communications?

To ensure communications are not missed it is possible to have these sent to multiple email addresses. This is done by adding the additional email addresses to the Profile for the Super User (the person who set up your account). Note this is different to the Organisation Email Address under Organisational Details which **does not** receive communications.

To add multiple email addresses for an individual on SmartProcure:

1. You, the Super User (account owner) log into SmartProcure.
2. Click on 'Manage your profile' then 'Registration Data'.
3. Click on 'Edit' at the top of the profile.
4. Scroll down to the Main User Details section.
5. After the existing email address, enter a semi colon (;), then with no space type the next address.
6. If more addresses are to be added, repeat the step above separating the addresses with a semi colon each time.
7. Save your changes by pressing the 'Save' button on the tool bar at the top of the page.

3. How do I Deactivate a Sub-User (Staff member) who has left?

When NZDF sends messages to your company via SmartProcure, an email is sent to the Super User account including any additional emails added to the Super User Profile. The email address of any staff member who has left the company and is linked to the Super User Profile will bounce back to NZDF. You may be requested to deactivate this email account.

You cannot delete a sub-user as the system keeps an audit history of all users. You will need to:

1. You, the Super User (account owner) log into SmartProcure.
2. Click on 'Manage users'.
3. Click on the surname of the user you want to deactivate.
4. Click on the triple dots at the top of the page and select 'Deactivate User'.
5. Tick the 'Confirm User Deactivation' box.
6. Select 'Confirm'.
7. The user has been deactivated.
8. They can be re-activated by following the same process, click 'Activate user' after selecting the users name.

4. How do I set-up multiple users?

To allow multiple users to be involved in the preparation of your tender response, you can add multiple users to the organisation's profile.

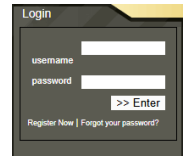
To add multiple users the Super User must:

1. Login to SmartProcure with your username and password.
2. Go to User 'Management - Manage users - Users'.
3. Click on the 'Create' button to create a New User.
4. Complete the 'User Details' form and click the 'Save' button at the top of the page.
5. Once a user has been created you can now assign user rights.
6. Click on 'View User Rights'.
7. The user rights will all be default set to 'No'. To amend the user rights, click the 'Edit' (pencil icon) button at the top of the screen.
8. Ensure the 'Contact Visible to Buyer' field is set to 'Yes' so that the User can be contacted by NZDF about tenders or system-related queries.
9. Change the user rights accordingly for each multiple user and click the 'Save' button at the top of the screen.
10. Each user will receive an automated email detailing their username and password.

5. How do I request a new password?

If you have forgotten your password, you can request a new password. To request a new password you must:

1. Browse to <https://nzdf.apa.app.jaggaer.com>
2. Click on the 'Forgot your password?' link in the login box.
3. Enter your username **and** the registered email address, and then click the 'Submit' button.
4. A new password will be issued to the registered email address



Tips and Recommendations for requesting new Passwords:

- If you copy and paste the password from the email you have received then make sure you don't copy any additional spaces as the password will be rejected.
- When you login for the first time with a new system-generated password, you will be requested to change the password. Ensure you save your new password securely.

6. How do I avoid being timed-out of SmartProcure?

SmartProcure follows strict guidelines for security and tender integrity; it times-out after approximately 15 minutes of inactivity.

To avoid being timed-out:

1. You should **always** 'Save' your work regularly. This will help maintain an active session with the server and reduces the risk of losing any work should your session be timed-out.
2. A pop-up is available to advise you when are about to be timed-out (2 minutes warning) and allows you to refresh your session to remain active.
3. You should avoid the use of 'back' and 'forward' buttons on your browser when navigating the site, as this increases the risk of time-outs. You should **always** use the navigation links within SmartProcure to move between screens.

Tips and Recommendations to avoid Time-outs:

- To allow active pop-ups on your own PC, click 'Tools' within your own Internet browser window; and 'enable pop-ups' (or 'turn-off pop-up blocker').
- It is recommended that if you experience problems with time-outs, you should delete the 'Cookies' and 'Browsing History' from your own PC.

7. How do I find Tenders and 'Express Interest'?

In order to 'Express Interest' in a tender, you need to:

1. Browse to <https://nzdf.apa.app.jaggaer.com>
2. Login using your username and password.
3. Click on the 'RFQ/RFP open to all Suppliers' and/or 'ROI/RFI open to all Suppliers' links. These are tenders that are available to any registered supplier.
4. Click on the relevant tender to access further details and content.
5. Click on the 'Express Interest' button near the top of your screen. This will move the tender over to the 'My RFQ/RFP' or 'My ROI/RFI' page (this is a secured area reserved for your tenders only).
6. Upon expressing interest you will be able to access all tender documentation and submit a response to the tender.

Tips and Recommendations on 'Expressing Interest':

- You should avoid expressing interest in tenders where you do not intend to reply. Once you have expressed interest in any tender you will receive **all** communications and system generated alerts relating to that tender.

8. How do I 'Reply' to tenders?

In order to reply to a tender where you have clicked on 'Express Interest' or have been invited to respond by NZDF, you need to:

1. Browse to <https://nzdf.apa.app.jaggaer.com>
2. Login using your username and password.
3. Click on 'My RFQ/RFP' or 'My ROI/RFI'.
4. Click on the relevant tender to progress further.
5. You will then be presented with the online questionnaire that you must complete. An online questionnaire can be made up of a Qualification Response, and/or Technical Response, and/or Commercial Response. This will vary depending on the nature/structure of the tender.
6. Click on the envelope button ie: Qualification, to respond to the questions.
7. As you progress through the online questionnaire, click 'Save' regularly to avoid being timed-out and losing any un-saved work. Use the 'Save and Continue' button to remain within that section of your response, or the 'Save and Return' button to save your responses to that section and return to the response index.
8. NOTE: NZDF may attach a Response document to be downloaded, completed and uploaded rather than an online questionnaire.

Tips and Recommendations on Replying to Tenders:

- You **do not** need to complete the online questionnaire in a single session. Providing you have saved your work, you have flexibility of partially completing the online questionnaire, logging out, and then picking up your response from the last saved point.
- If you are picking up your response from the last saved point, select the envelope you wish to continue responding to, and continue.
- The red asterisk indicates a mandatory field. These must be completed in order to submit your tender to NZDF.
- Try to answer all questions, not just those that are mandatory.
- Text responses are deliberately capped at 2000 characters (± 350 words). If NZDF requires a larger response an additional text box or 'Attachment' question would be added.
- Numeric fields will not accept text, spaces, symbols etc.
- Do not leave this to the last minute as technical issues can occur resulting in a late response.

9. Can I Complete my Tender Response Offline?

You must submit your tender response through the SmartProcure system however you can download the tender questions in excel and complete your responses offline and then upload your response. To do this you must:

1. Browse to <https://nzdf.apa.app.jaggaer.com>
2. Login using your username and password.
3. Click on 'My RFQ/RFP' or 'My ROI/RFI'.
4. Click on the relevant tender to progress further.
5. You will then be presented with the envelopes to respond to. These can be made up of a Qualification Response, and/or Technical Response, and/or Commercial Response. This will vary depending on the nature/structure of the tender.
6. Click the 'Online Questionnaire in Excel' button at the top of the page.
7. Click 'Download Online Questionnaire in Excel' and save the excel spreadsheet to your computer.
8. Complete your responses in the yellow and blue cells on the excel spreadsheet and save.

9. When you are ready to upload the spreadsheet, navigate back to the tender using steps 1-4 above.
10. Click the 'Export/Import Response' button.
11. Select the excel file to import using the 'Browse' button.
12. Click 'Import Excel'. Your response should now upload.
13. Review the completed response and click 'Save Changes'.

Tips and Recommendations on Completing your Response Offline:

- Only enter information into the yellow and blue cells.
- Do not add, remove or change any parts of the excel workbook (except the yellow and blue cells) or it may not upload.
- The "Response Type" column gives you the type of answer required. Where the response type is "text" you are only able to enter 2000 characters.
- The "Response Guide" column gives available options with which to answer yellow/blue cell next to the appropriate option.
- Do not leave this to the last minute as technical issues can occur resulting in a late response.

10. How do I download Attachments?

NZDF will provide supporting documentation for each tender in the form of attachments that the Tenderer can download.

To download NZDF attachments, you must:

1. Browse to <https://nzdf.apa.app.jaggaer.com>
2. Login using your username and password.
3. Click on 'My RFQ/RFP' or 'My ROI/RFI'.
4. Click on the title of the tender.
5. Click on the 'Buyer Attachments' link in the Details box on the left hand side of the page. The number denotes the number of attachments that are available.
6. You will now be presented with a list of attachments that you can download.
7. Click on the 'Mass Download' button to bring up a list of the documents to download. Select the documents you wish to download. Press the 'Download Selected Files' button and select the destination folder to download all attachments to your computer. You can work on attachments off line if they have been saved to your own computer.

Tips and Recommendations for Downloading Buyer Attachments:

- **Always** ensure that you download **all** supporting documentation that has been provided for each tender.
- You should thoroughly read and digest all information that is contained within the buyer attachments.
- Always try to take note of any key instructions, requirements, deadlines etc. and plan your response accordingly.

11. How do I upload attachments as part of my tender response?

There may be instances where you are required to provide some form of documentation as part of your response to a tender.

To upload attachments as part of your tender response (where requested by NZDF via in-line attachment questions), you must:

1. Browse to <https://nzdf.apa.app.jaggaer.com>
2. Login using your username and password.
3. Click on 'My RFQ/RFP' or 'My ROI/RFI'.
4. Click on the title of the tender.
5. Click into the My Response heading.

6. Locate the question within the tender where you wish to upload an attachment or locate the Add/View Attachments button at the bottom of each section.
7. Click the 'Upload New File' button.
8. Select the Upload Method from the drop down box.
9. Browse to the file within your directory.
10. Provide an Attachment Description and/or Comments on Attachment if required.
11. Click the 'Attach' button.
12. Submit these changes to your response by clicking the 'Submit Changes' button.

Tips and Recommendations for uploading attachments:

- Attachments should be **Microsoft Office** documents (Word, Excel or PDF).
- In-line attachment questions traditionally only accept a single file. If you wish to upload multiple files, you will need to create a zip folder on your own computer with all the files contained, then upload the zipped folder.
- Only use standard win.zip software.

12. How do I create a zipped folder on my own computer?

1. Right click your mouse button on your desktop, my documents, or any other location where you wish to create the folder; go to 'New'; and then click 'Folder' (This will create a folder in the desired location where you can name the folder accordingly).
2. You must now either 'copy and paste' or 'save' the appropriate documents into the folder you have created.
3. Once you have placed all the required documents into the folder; right click your mouse button on the actual folder itself; go to 'Send to'; and then select 'Compressed (zipped) folder'.
4. This zipped folder can now be uploaded as per the instructions for uploading attachments above.

13. How do I 'Submit' my Tender Response?

Once you have completed your response to a tender, you must now make it visible to NZDF by 'Submitting' the response for evaluation.

To 'Submit' your response, you must:

1. Browse to <https://nzdf.apa.app.jaggaer.com>
2. Login using your username and password.
3. Click on 'My RFQ/RFP' or 'My ROI/RFI'.
4. Click on the title of the tender that you wish to 'Submit'.
5. Once you are happy with your responses, click the 'Submit Response' button at the top of the page.
6. You will then be asked to ensure that you have reviewed your response for completeness, including any file attachments, and then click 'OK' to continue with submitting your response.

Tips and Recommendations for 'Submitting' your response:

- **DO NOT** leave it until the last minute to publish your response. If you encounter any technical or commercial problems, the NZDF helpdesk may not be in a position to support your last minute request for assistance.
- Before you publish your response, ensure you have thoroughly checked your response for completeness.

14. How do I communicate with NZDF?

Each tender will have a unique message board. You are able to communicate with NZDF to seek further clarification around any questions you may have regarding the tender.

To send a message you must:

1. Browse to <https://nzdf.apa.app.jaggaer.com>
2. Login using your username and password.
3. Click on 'My RFQ/RFP' or 'My ROI/RFI'.
4. Click on the title of the tender from which you wish to send a message.
5. Click on the 'messages' heading within the Messages box.
6. Click on the 'Create Message' link.
7. Enter a subject and the content of the message, and then click the 'Send Message' button.

Tips and Recommendations for sending messages:

- All sent messages are listed in the 'Sent Messages' link within the Messages box. You are able to view when a message you sent has been opened and replied to by NZDF.
- You are also able to forward message that have either been received or sent from SmartProcure to a valid external email address or print the message.
- When you receive a message from NZDF, you will be notified via an automated alert to your registered email address. You will be required to login to SmartProcure to view the actual content of the message.