OIL INDIA LIMITED

GUIDELINES TO BIDDERS FOR E-PROCUREMENT APPLICATION

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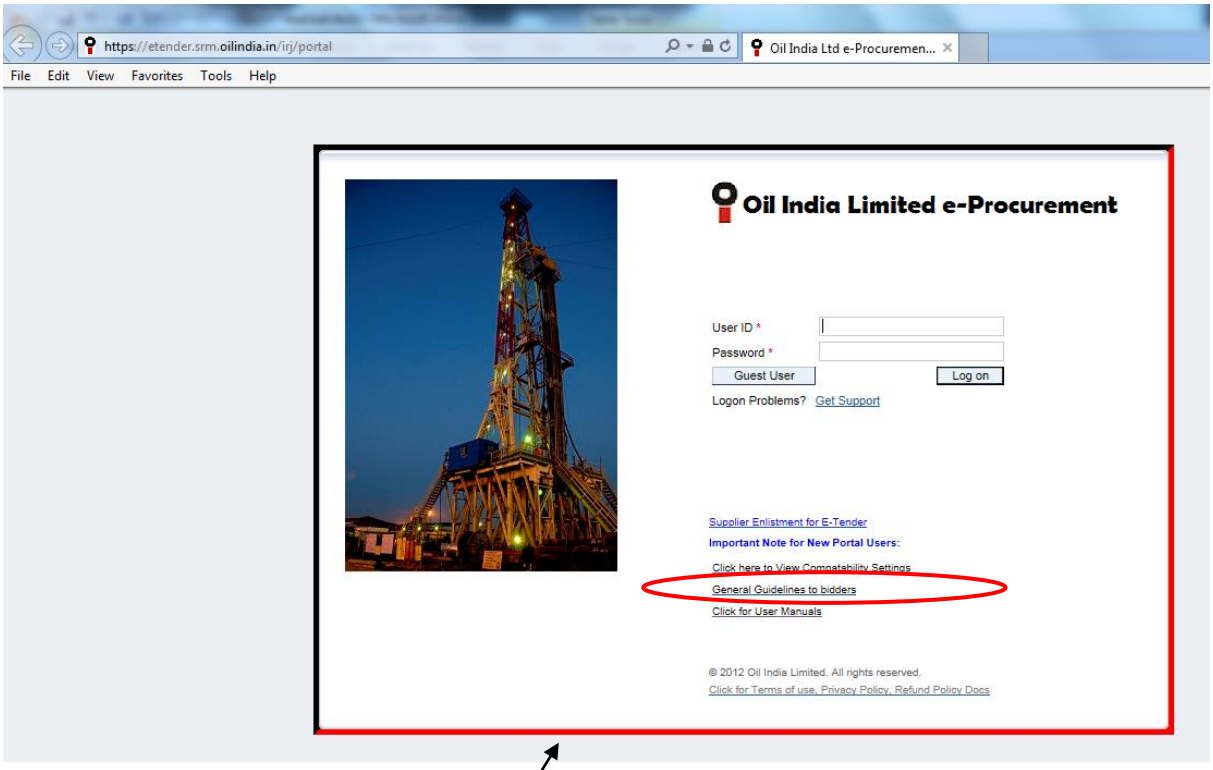
1. INTRODUCTION

User manual for viewing, downloading and participation of tenders in oil's e-tender portal

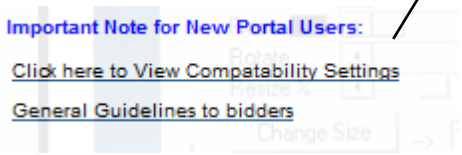
PURPOSE

The Purpose of this document is to educate the bidders about how to view and download the tender details from the OIL's e-tender portal. The steps to be followed for participation and submission of offers.

2. GENERAL INSTRUCTIONS TO BIDDER FOR E-TENDER



Two important documents are uploaded on this webpage:



The Compatibility Settings guides about the Internet Explorer Browser setting to work properly the OIL's e-tender portal.

The second is guideline to the bidders about the details of the pre-requisite for the e-tendering in OIL.

Users are requested to go through this document in detail before actually working on the system.

3. PRE-REQUISITES

FOR VIEWING AND DOWNLOADING:

- ✓ OIL's E-Tender Portal runs only on Internet Explorer (IE) 8.0 and above**.**
- ✓ User should have a valid User ID from OIL for E-Tender Access [Else Guest Login can be used]
- ✓ Tender should have been published in the E-tender Portal.
- ✓ All Open Tender which are **open** can be viewed by all including Guest Users.
- ✓ Limited Tenders meant for specific Vendor can only access through the Login with their User ID, provided the tender is addressed to them.

FOR PARTICIPATION:

- ✓ Bidders should have a valid logon ID and Password.
- ✓ Tender Fee has to be paid as per the Tender requirement.
- ✓ For Open Tenders, bidders need to go to the Individual Tender and Register [Tender wise] for allowing them for participation [Detail Procedure available in the manual under participation]
- ✓ Valid Digital Signature of Class III with Organizations Name along with Encryption Certificate.

For Technical setting and other information please refer "Guidelines to Bidders for participating in OIL" and "FAQ".

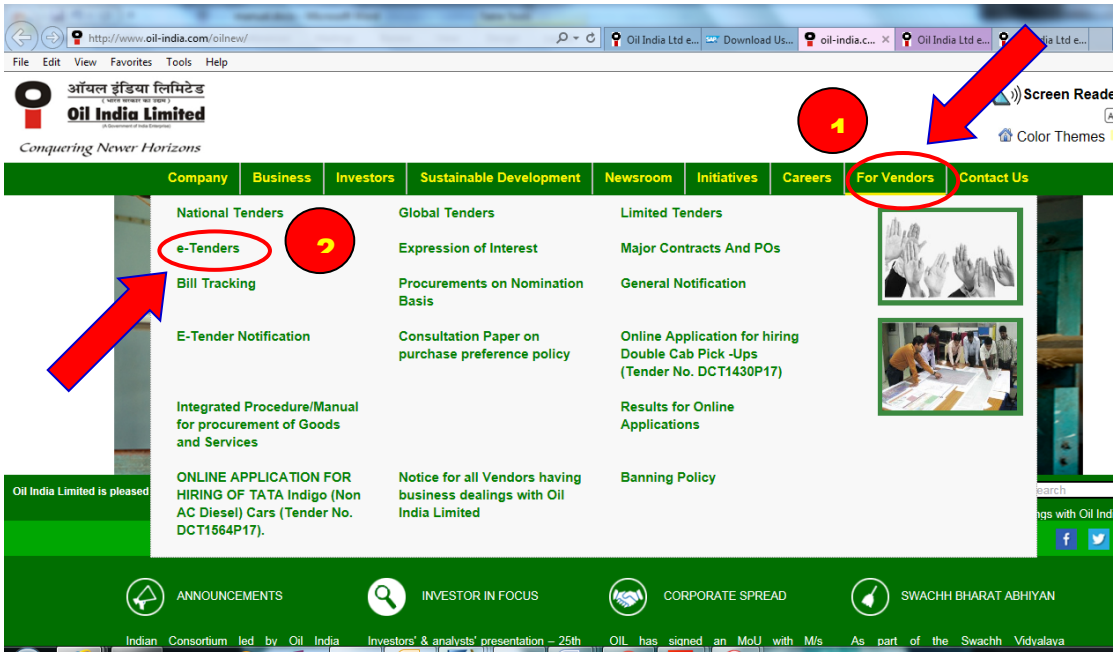
NOTE:

Since, our – tender portal is running on port: 1443, please ask your network team to open the port no. 1443 in the firewall so that the page gets displayed in the browser properly.

4. ACCESSING OIL'S E-TENDER SITE

- Open internet explorer (IE 8.0 or above)
- Go to Oil India Limited's website : www.oil-india.com
- Go to "**For vendors**" menu and the "**e-tenders**"

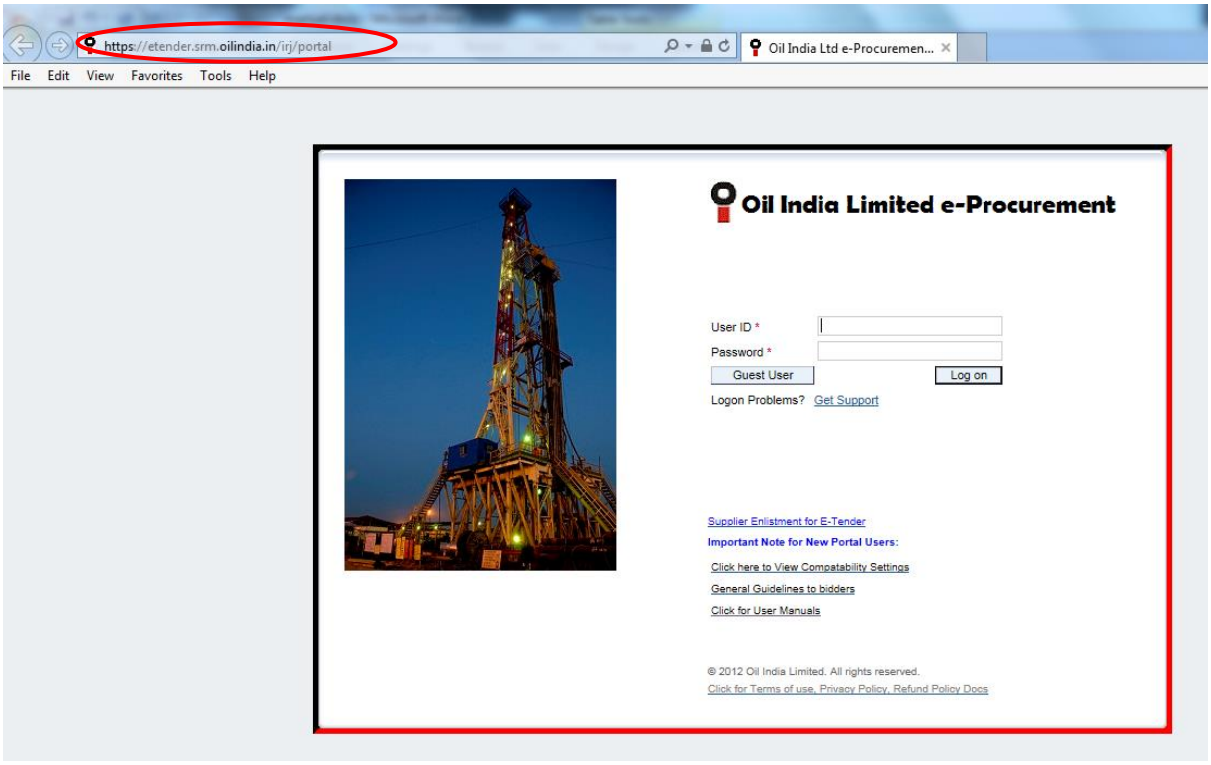
For opening the e-tender Log-on page, one can go through the following path:



Bidder May Access the OIL's E-tender site directly by using the URL:
https://etender.srm.oilindia.in/irj/portal

NOTE :

Bidders are requested to use Internet Explorer only for OIL's E-tender



5. ONLINE VENDOR REGISTRATION

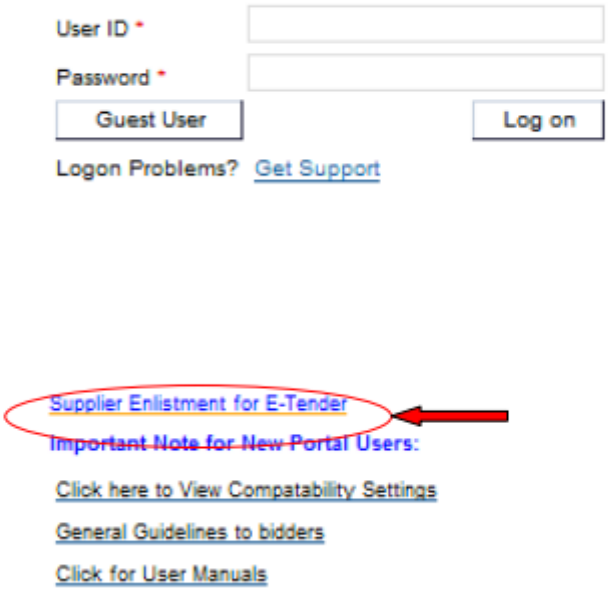
1) For obtaining User ID and Password, interested bidders are requested to go for Online Registration. Please do go to the url: **https://etender.srm.oilindia.in/irj/portal** And go to the link Supplier Enlistment for E-Tender .Other details can be viewed in **www.oil-india.com**. Bidders are advised to apply for user ID at least 7 days prior to the last date of tender fee payment for their own interests. User ID's shall be processed **within 4 days,** subject to furnish complete information by the bidder. OIL shall not be responsible for any delays in allocation of user ID/password and other tender related formalities.

2) Once the registration is completed initially user id and password will be assigned to the bidder.

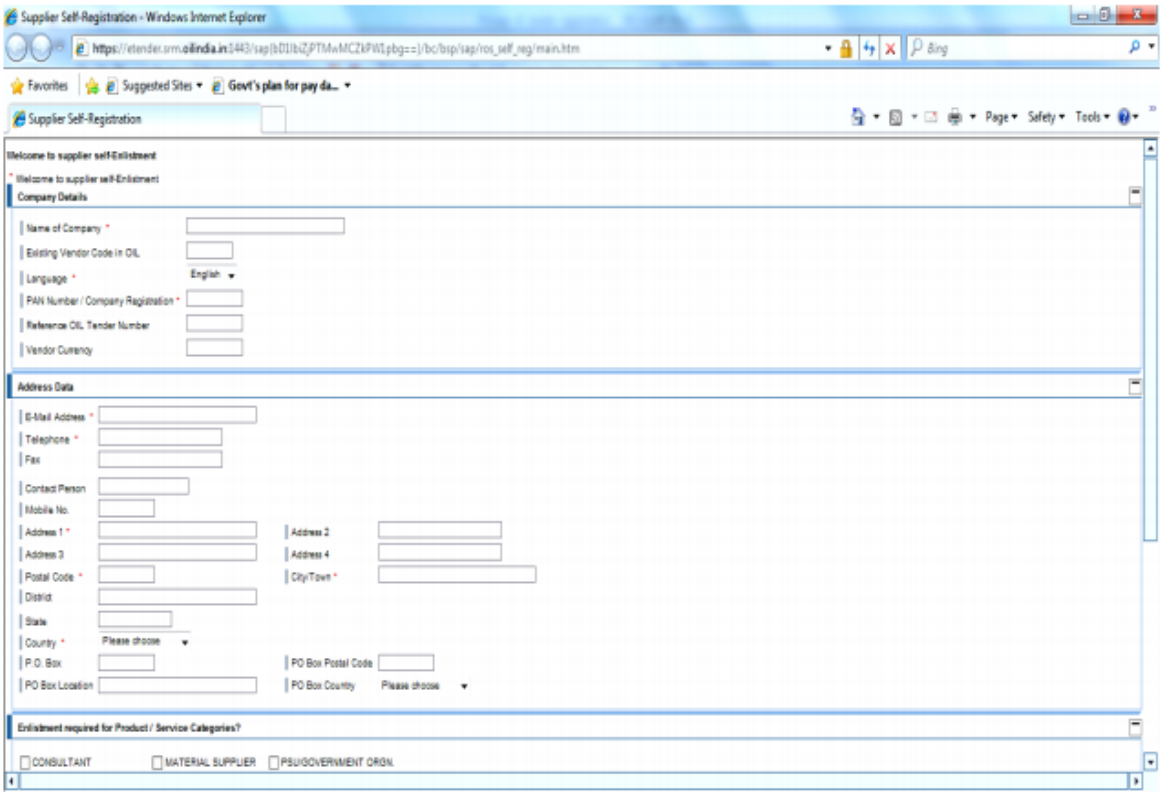
6. PROCESS FOR OBTAINING USER ID & PASSWORD FOR PARTICIPATION IN OIL'S E- TENDERS

For participating in Oil India limited e-tenders, all new vendors must get themselves enlisted in Oil India Limited's e-procurement portal through the following steps. **Also, please use only internet explorer IE-8 or above only.**

1) Please do go to the url: **https://etender.srm.oilindia.in/irj/portal** and go to the link "**Supplier Enlistment**" for E-Tender



2) Fill up the details for issuing user ID:

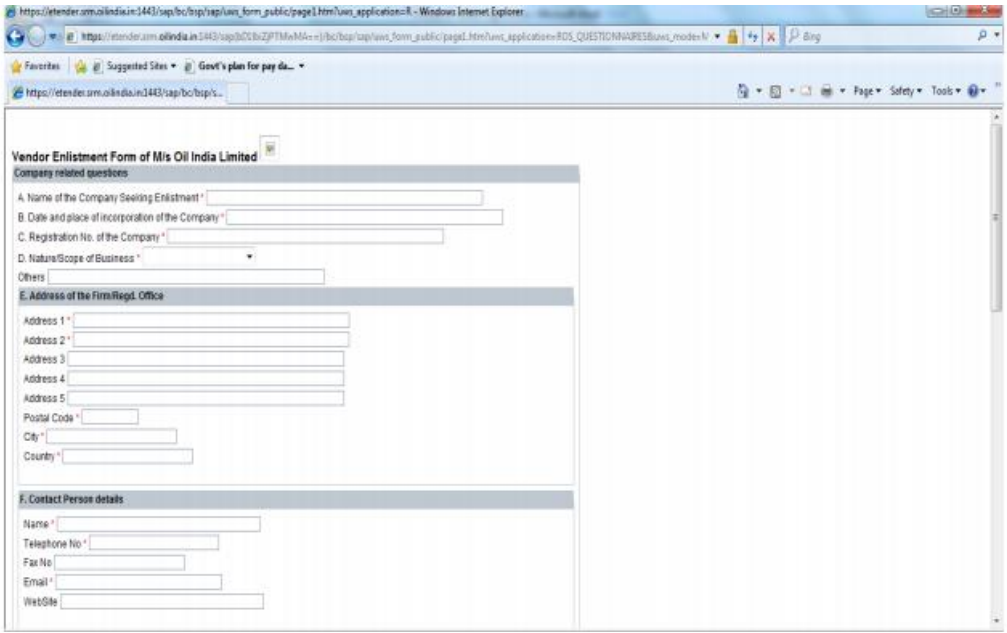


3) Following are the **mandatory** documents to be uploaded during registration:

a) PAN Card and previous year's audited balance sheet in case of domestic vendor.

b) Valid Business License/Company registration certificate (translated to English, if provided in a foreign language) and previous year's audited balance sheet, in case of foreign vendor.

4) After submission of the required details, a link for questionnaire form shall be issued to the registered email:

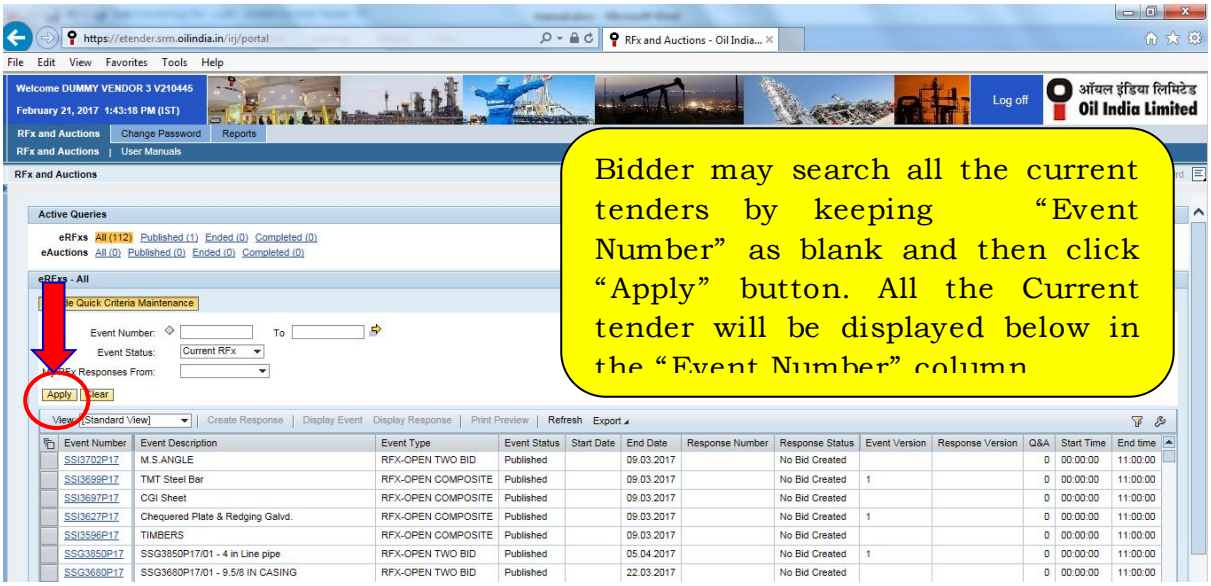


5) Please fill up the questionnaire and submit the same to complete the registration process.
6) After successful submission of the questionnaire, a request ID shall be generated for correspondence.
7) After scrutiny of your documents, 'Vendor code' and 'Password' will be communicated to your e-mail, if the documents are found to be in order.

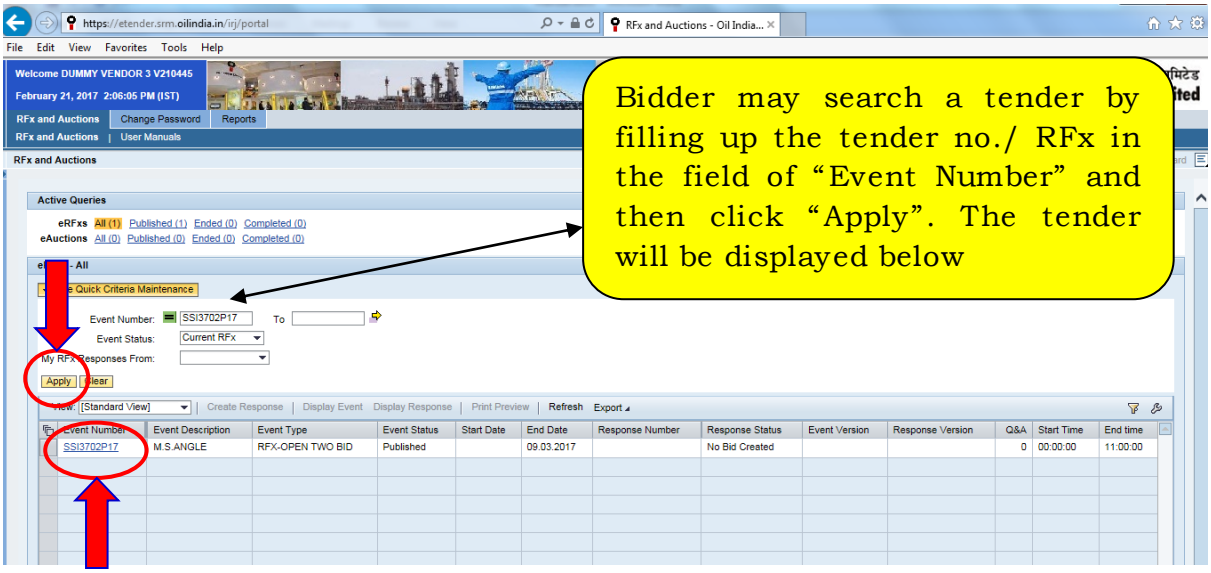
For, the detailed procedure for payments towards 'Tender Fee' and 'Bid Security/EMD' through 'Payment Gateway', please refer the instructions as incorporated in the tender(s).

7. VIEW AND DOWNLOAD TENDER DOCUMENTS

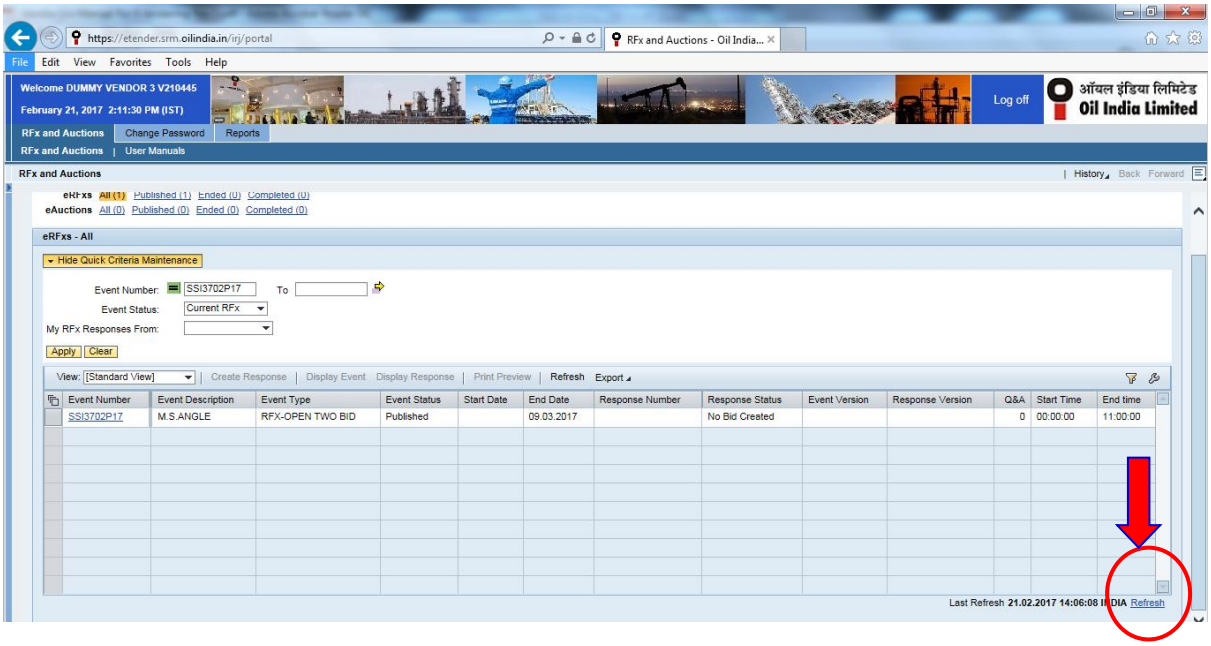
For accessing and participation, e-tender portal user Id and Passwords are issued from OIL. Else, users without having user ID can to use 'Guest' to login into the portal. On Login into the portal, the first page comes as under:



To Search a particular Tender / Rfx Number

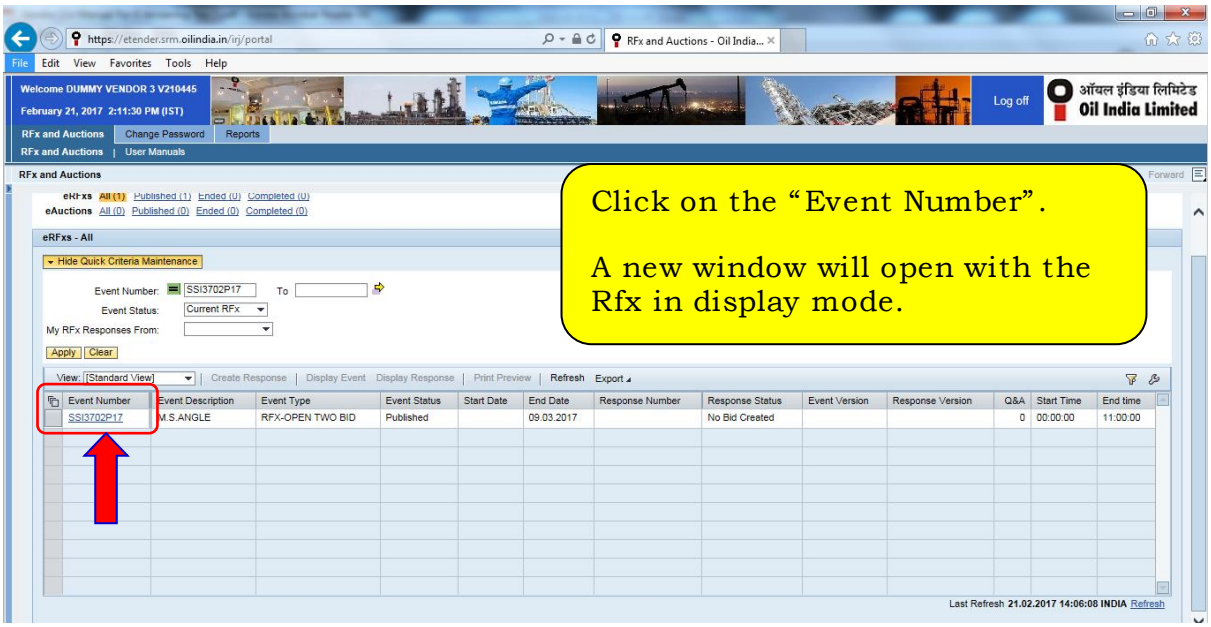


Click on "Refresh" at the bottom of the page to get the updated data.

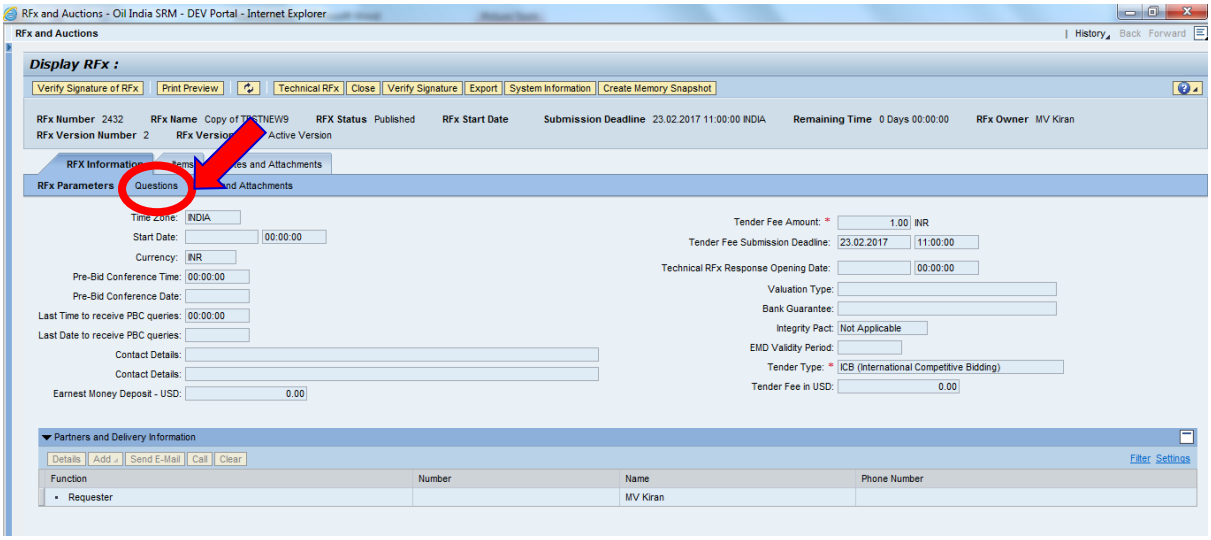


Display Tender [Rfx]

On clicking on the Tender number [In the field of Event No.] [RFx] , a new window will open with the Rfx in display mode.



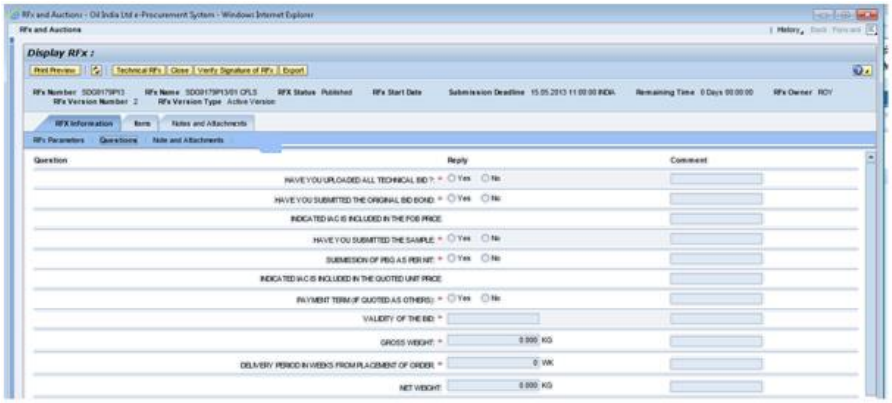
RFX Display



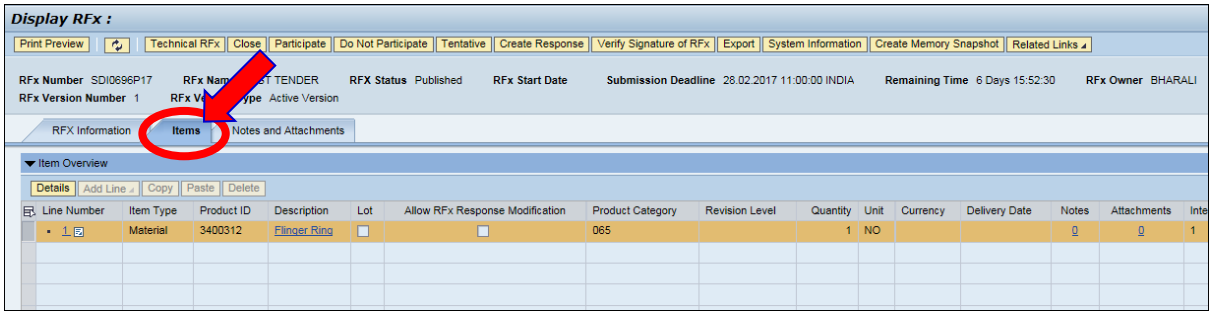
In the display mode, details are available as submission deadline, opening date, Tender fee, EMD requirements, Integrity Pact etc.

Now "click" on Question area near to Rfx parameter area under Rfx information tab to get all the questions maintained in the RFx.

All the questions whose answers are expected by the vendor to fill are displayed in this area (some of them are mandatory, marked with red star) as per tender requirements.

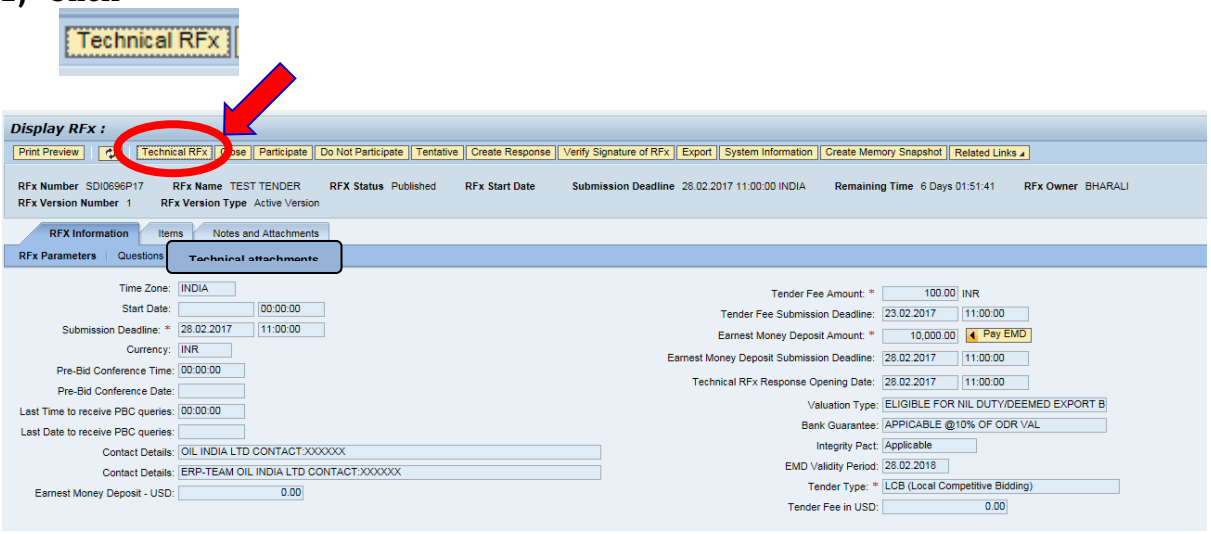


Click on Item tab to view the details of the material and services of the RFx.



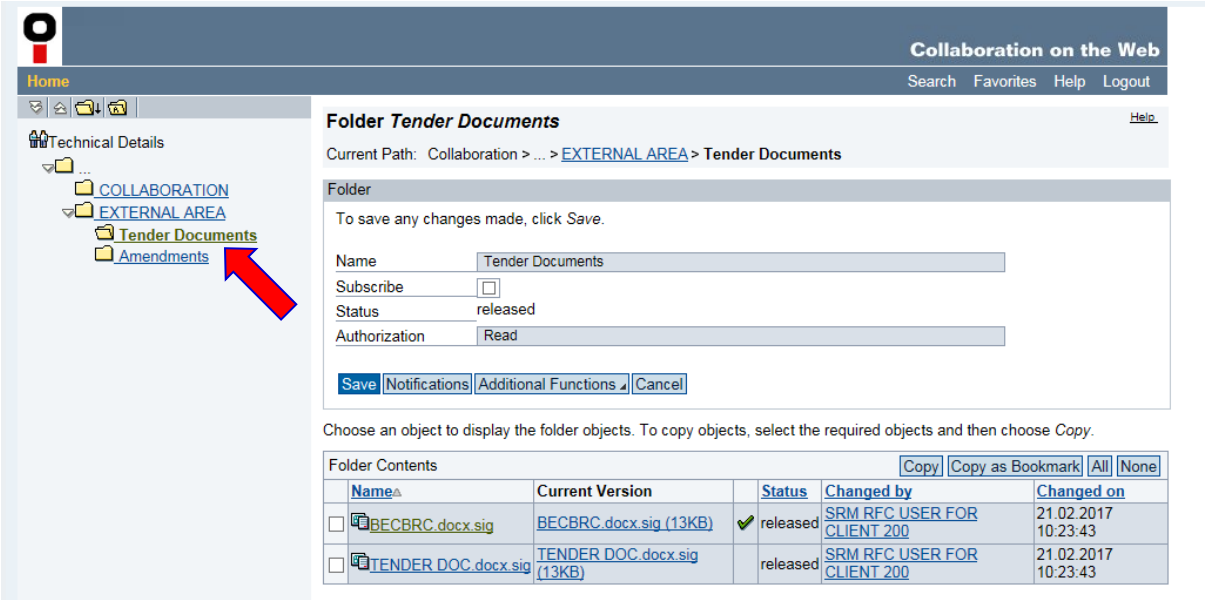
Download Technical Documents/ Tender Documents

1) Click



2) This will redirect to the C-folder in following structure. This is the area to view and download the Technical details like Details of Materials, Schedule of Services, BEC/BRC, Terms and Conditions of the Tender, Integrity Pact etc.

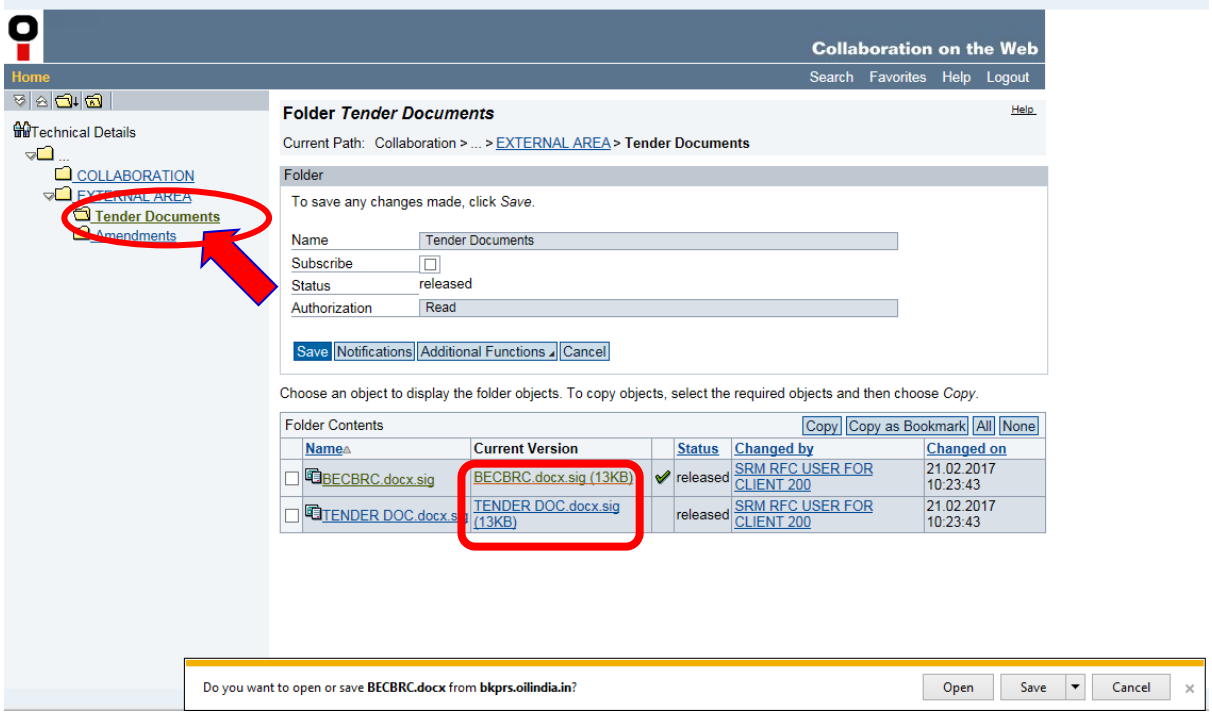
Window with Technical Rfx button, system will redirect to the following structure:



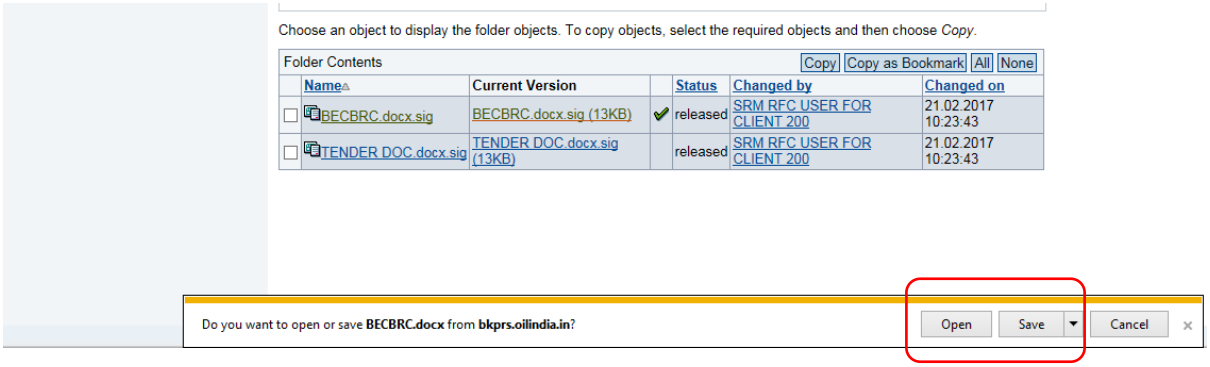
3) Under **"EXTERNAL AREA"** Folder two folder will be visible:

Tender Documents folder: Contains all relevant documents for the tender
Amendment Folder: Contains all relevant documents for tender amendment.

To open/view/save the file, please click the documents in Current Version



4) Choose the following option to Open/Save



8. ONLINE PAYMENT FOR TENDER FEE/ EMD

IMPORTANT POINTS TO THE BIDDERS:

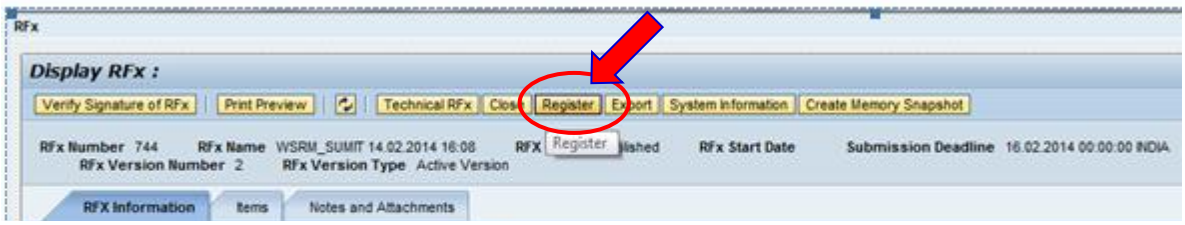
For Open Tenders, bidders need to go to the Individual Tender (After login with own credentials) and Click the Register Button once [Tender wise] for allowing them for participation or for paying Tender Fee on-line. Once the registration is done "PAY TENDER FEE" & "PAY EMD" button will automatically appear.

[Note: In some scenarios, if the bidder doesn't get the Register button, they will get the Create Response button [in that scenario, bidder has already been allowed to participate by the respective purchase department already.]

STEPS FOR PAYING ON-LINE TENDER FEE:

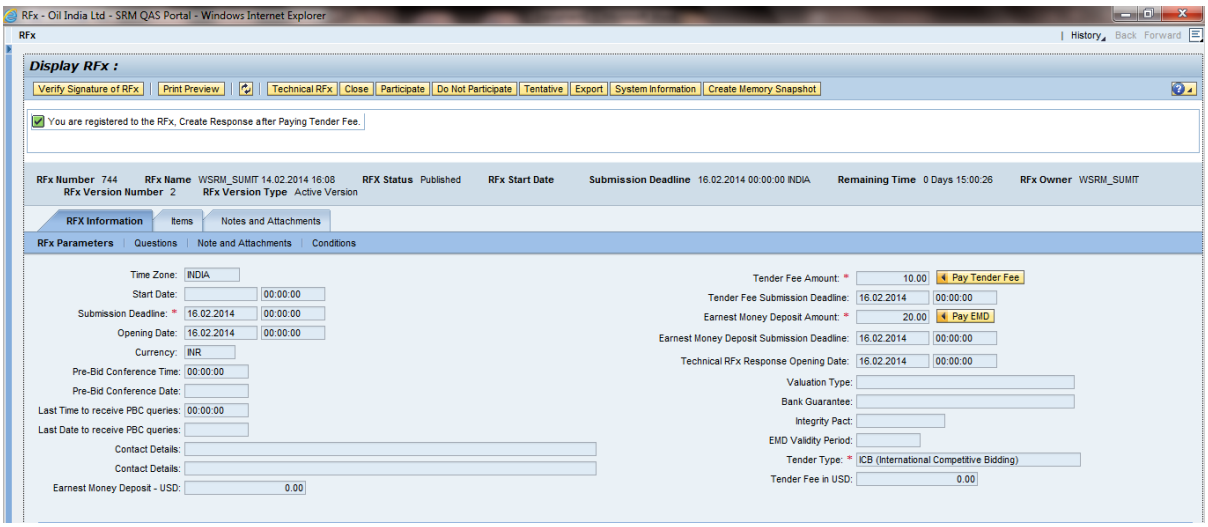
Step – I

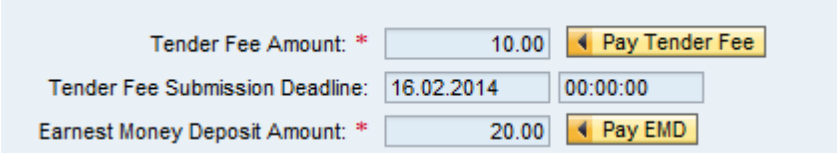
On the Respective Tender [RFx] , click the **"Register"** Button.



Step – II

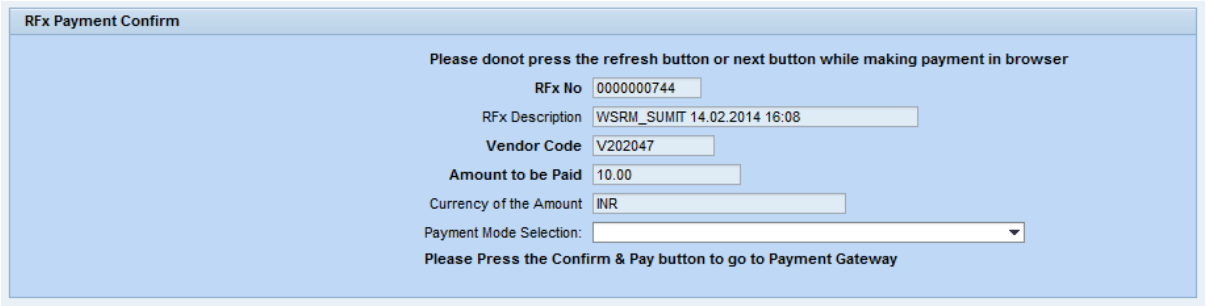
After registering in that Tender [RFx] two buttons will be visible - one is for Tender Fee payment Pay Tender Fee and second is for EMD payment Pay EMD . Please click on "Pay Tender Fee" button for Paying Tender Fee.





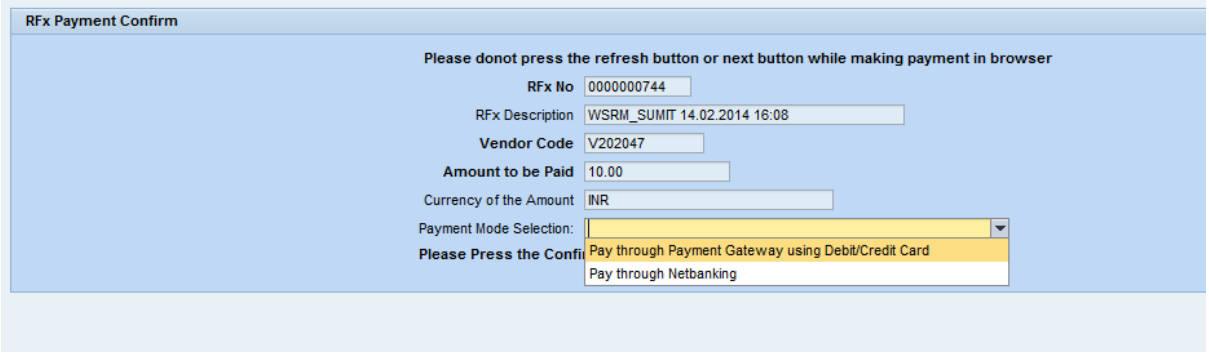
Step – III

After clicking on "Pay Tender Fee" button one new page would open. In this page Tender [RFx] Fee details are available.



Under Payment Selection Dropdown two options will be available:

- ✓ Pay through using Debit / Credit Card
- ✓ Pay through Net banking

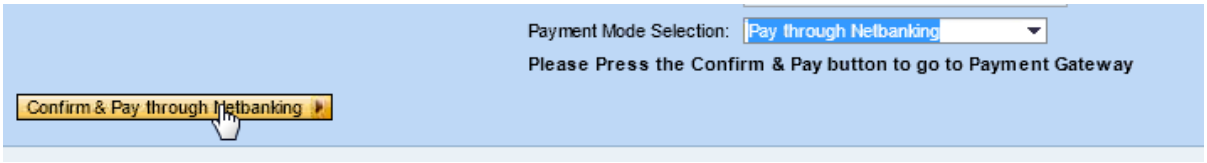


Step – IV

Based on your selection confirmation button is visible, please click on that and proceed further for payment.

A. Through Debit/Credit Card

B. Through Net Banking



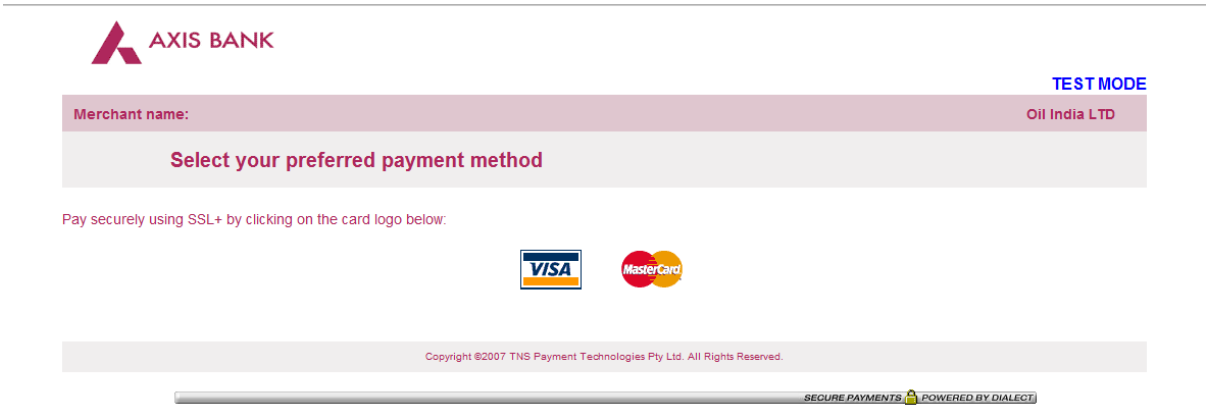
Step-V

After confirmation of payment one mail is sent to your registered mail id with RFx and Transaction ID.

Step-VI

Based on your selection please proceed with the payment process.

A. Through Debit/Credit Card



AXIS BANK

TEST MODE

Merchant name: Oil India LTD

Enter your card details

MasterCard: You have chosen **MasterCard** as your method of payment. Please enter your card details into the form below and click "pay" to complete your purchase.

Card Number

Expiry Date / month/year

Security Code The 3 digits after the card number on the signature panel of your card.

Purchase Amount INR 10.00

PAY NOW

MasterCard. SecureCode.

I hereby authorise the debit to my MasterCard Account in favour of Oil India LTD

AXIS BANK

TEST MODE

Merchant name: Oil India LTD

Please wait while your payment is processed

Please wait...

The server is processing your payment using MasterCard for the value of INR 10.00.

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SECURE PAYMENTS POWERED BY DIALECT

AXIS BANK

TEST MODE

Merchant name: Oil India LTD

Please wait while your payment is processed

Please wait...

The server is processing your payment using MasterCard for the value of INR 10.00.

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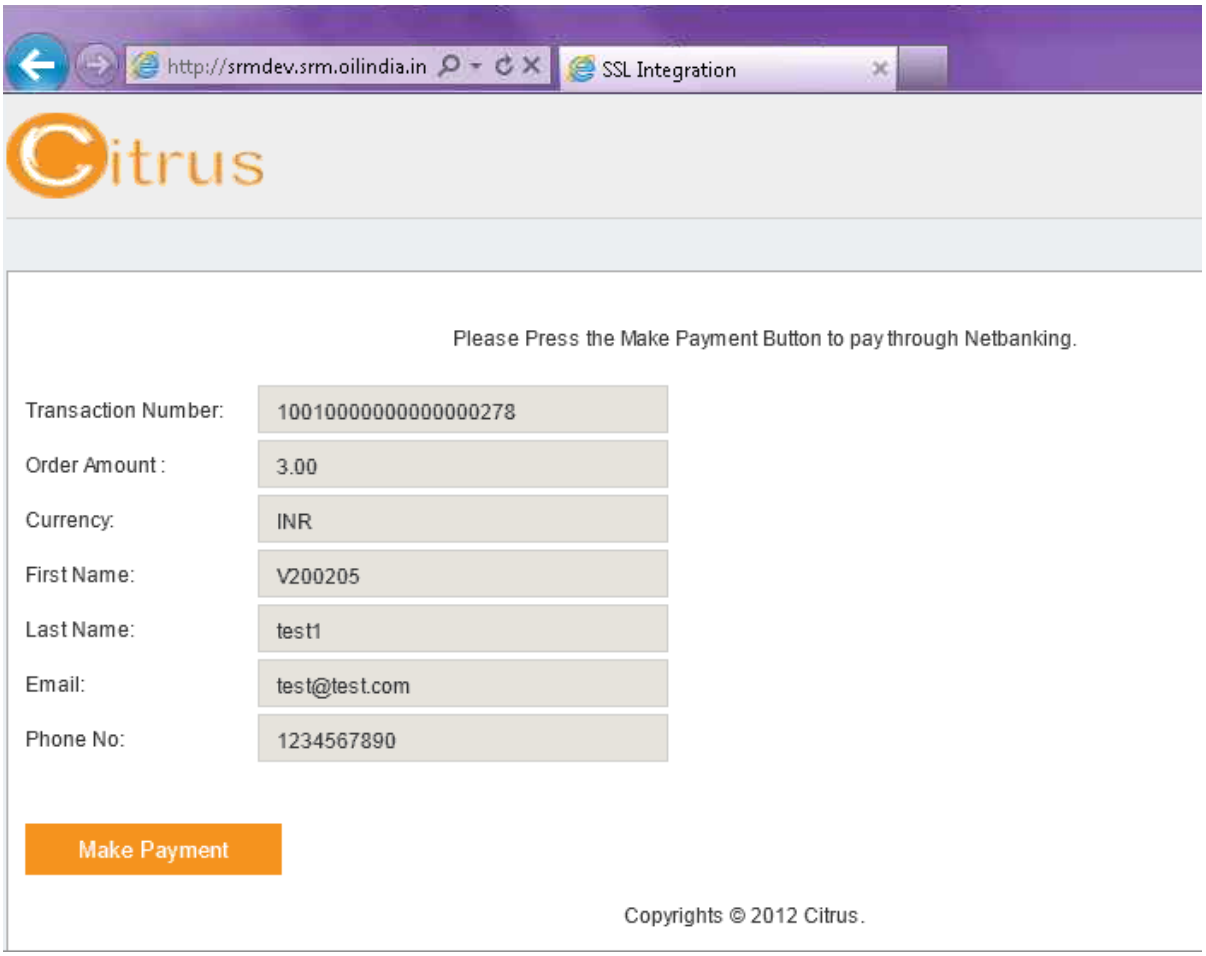
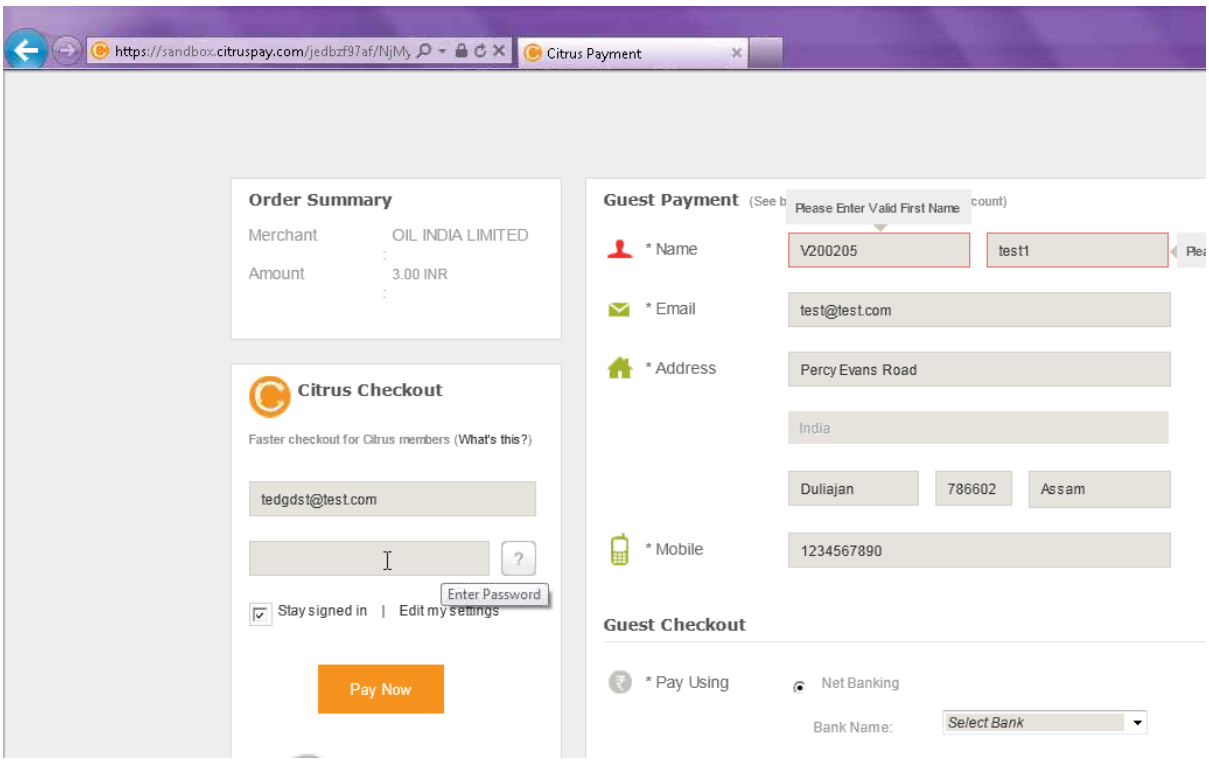
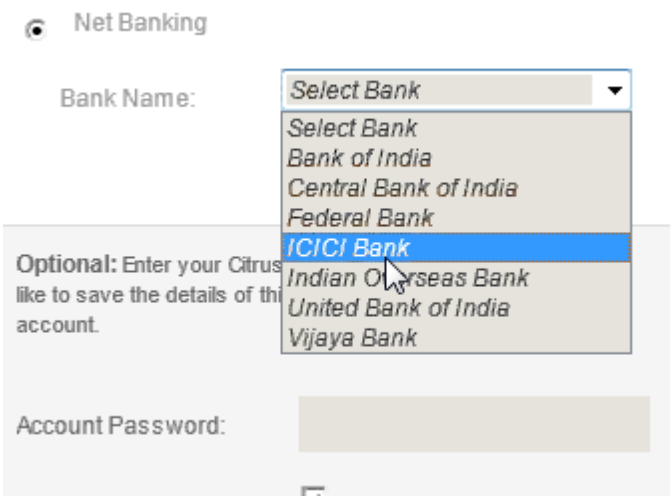
SECURE PAYMENTS POWERED BY DIALECT

B. Through Net Banking



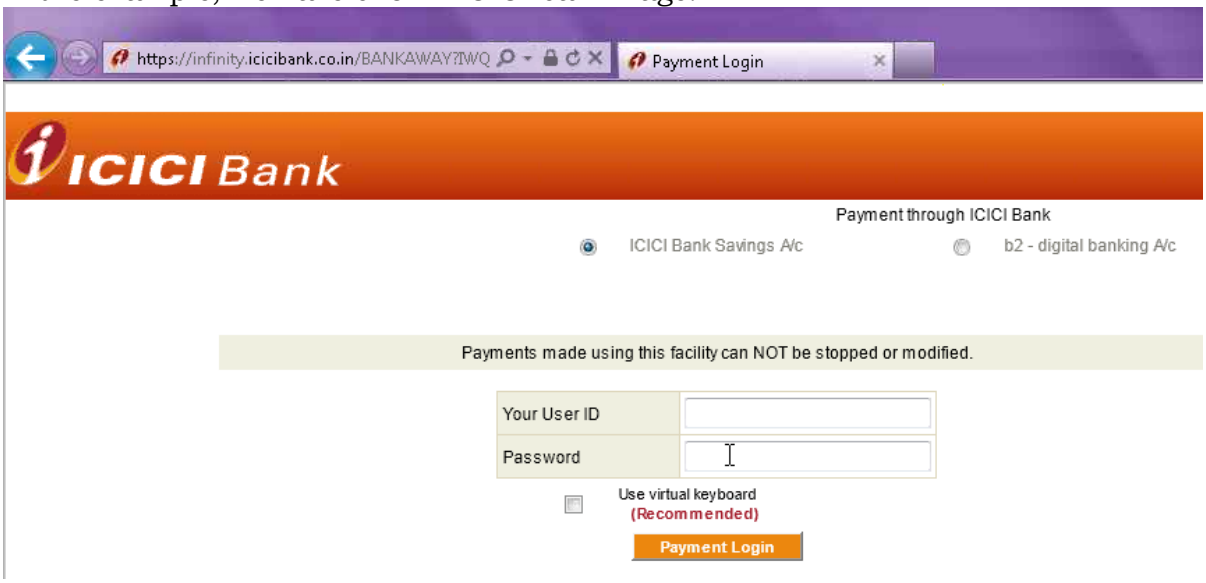


Select the Banking gateway

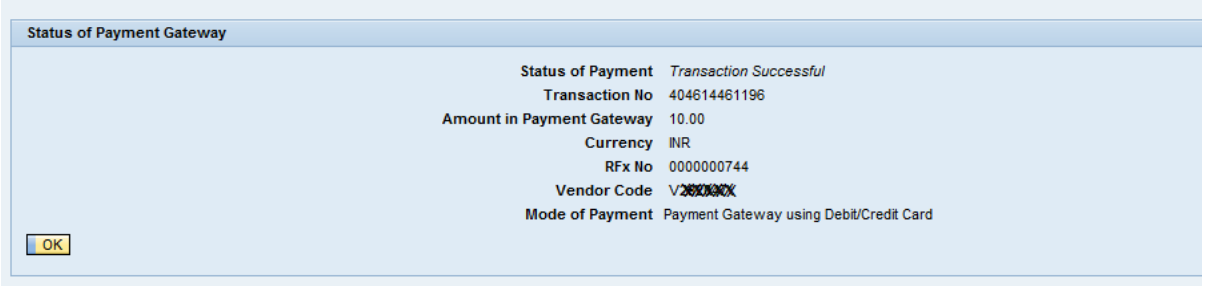


After selecting the Bank, click on

It will lead you to the Bank Gateway based on the bank selected.
In the example, we have shown ICICI bank Page.

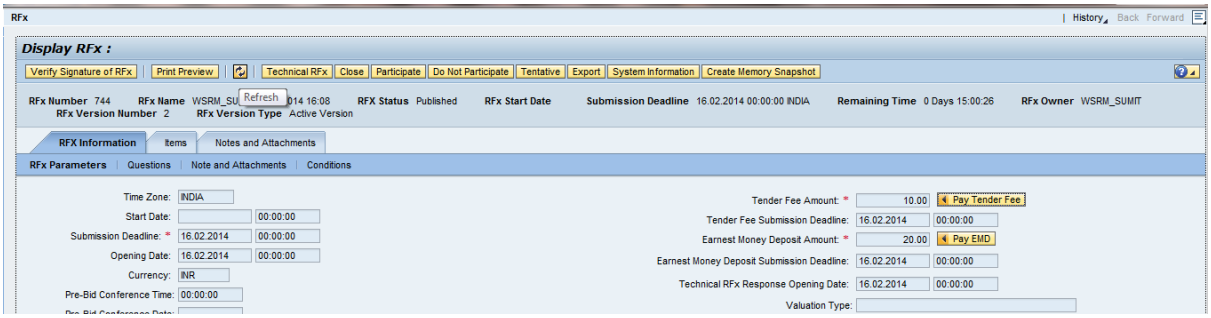


After payment process is complete, it returns back to SRM with Payment details.



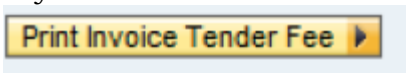
Step-VII

Click on button

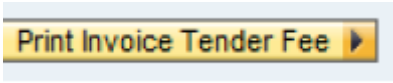


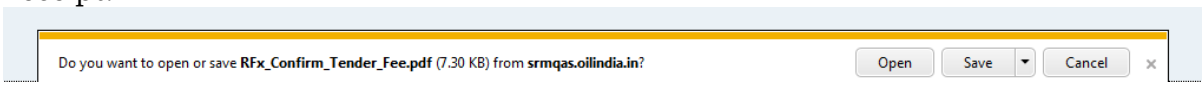
Step-VIII

Click on refresh button to Refresh the Page and get the correct status. Once
Payment of Tender Fee is successful, pay tender fee button will be



Step-IX

Click on  and "Open" or "Save" to get the Payment Receipt.



Step-X

PDF is getting generated with payment details.

Step-XI

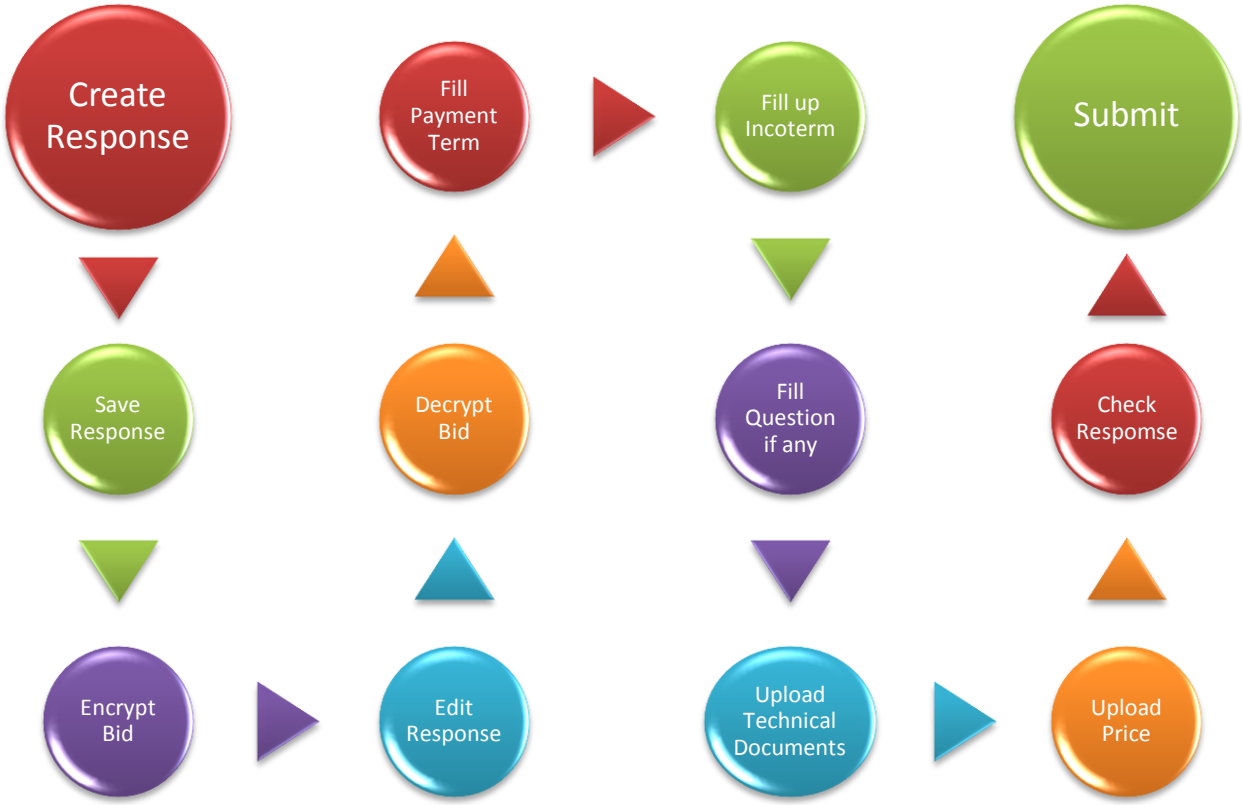
Once Payment is successful, you should get one mail with RFx and payment details. "**Create response**" button is also enabled. Click on that for further response creation. Follow the further Steps from the option ***Create Response For the Tender***.

NOTE:

In case of a failed transaction for tender fee payment [vendor failed to get the create response button, although payment deducted from the card/bank account], the vendor will have to initiate the payment process again. Duplicate payment if any will be refunded. For details please refer "Important Points for the Bidders for on-line Payment"

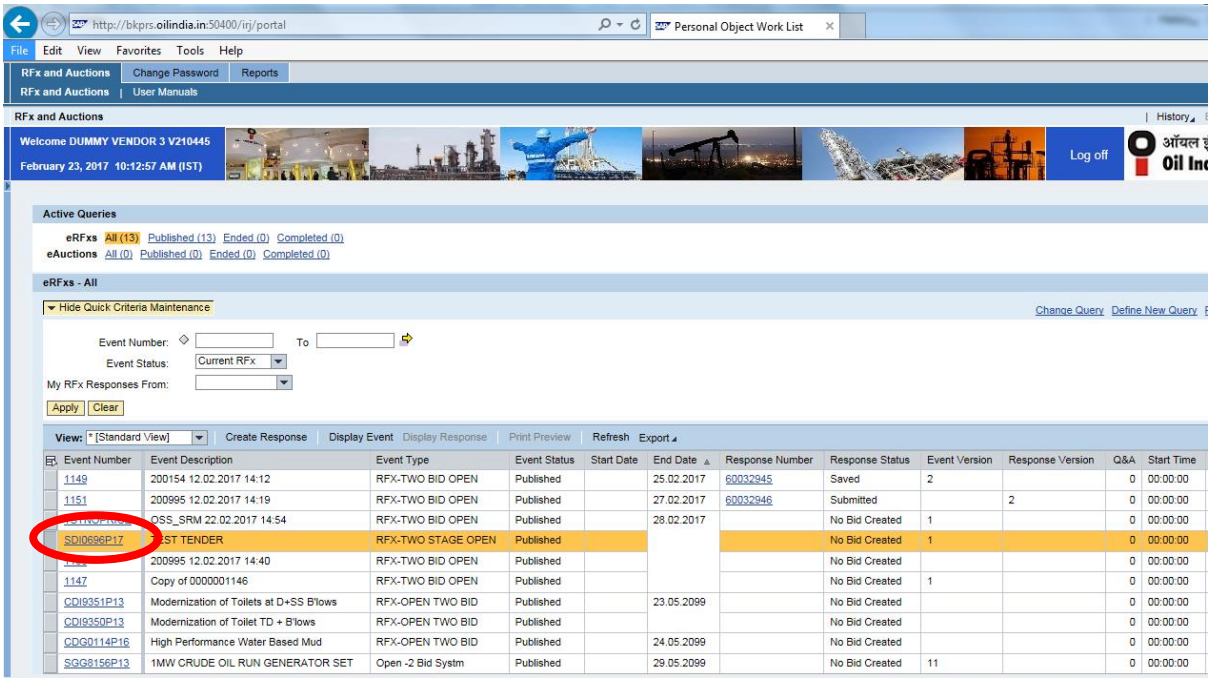
For exemption of tender fee/ EMD , please submit the NSIC/MSME Certificate etc to contact details mentioned under RFx Details. In that scenario, bidder has been allowed to participate by the respective purchase department and "CRETE RESPONSE" button will be appeared only when exemption of tender fee is maintained by purchaser in system.

9. PROCEDURE FOR ONLINE BID SUBMISSION FLOW CHART

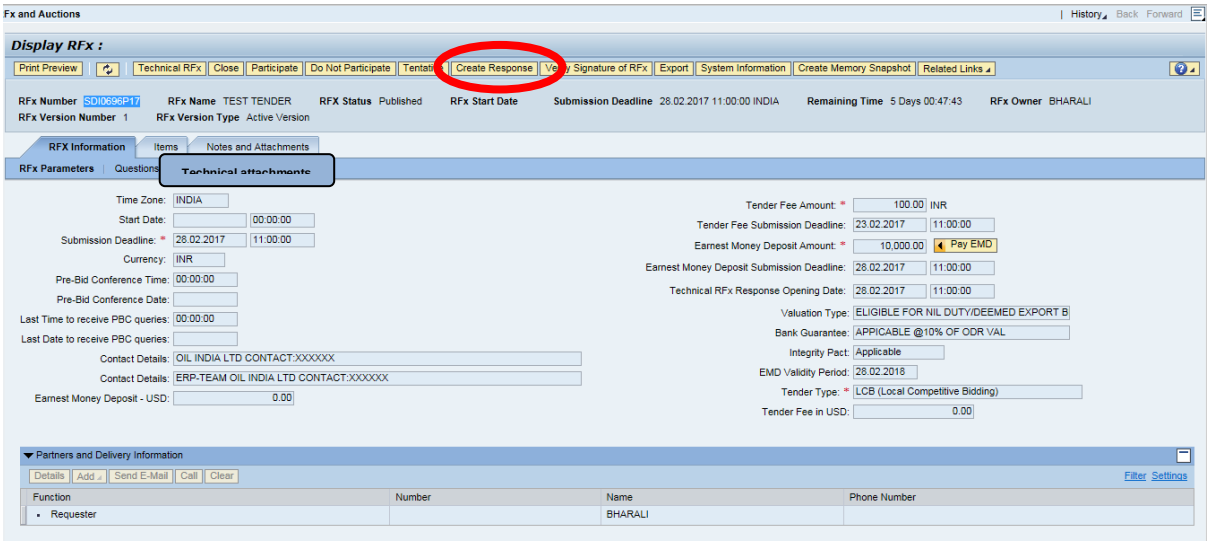


CREATE, SAVE & ENCRYPT RESPONSE

1. Click on the SDI0696P17 **<TENDER NO.>**link.

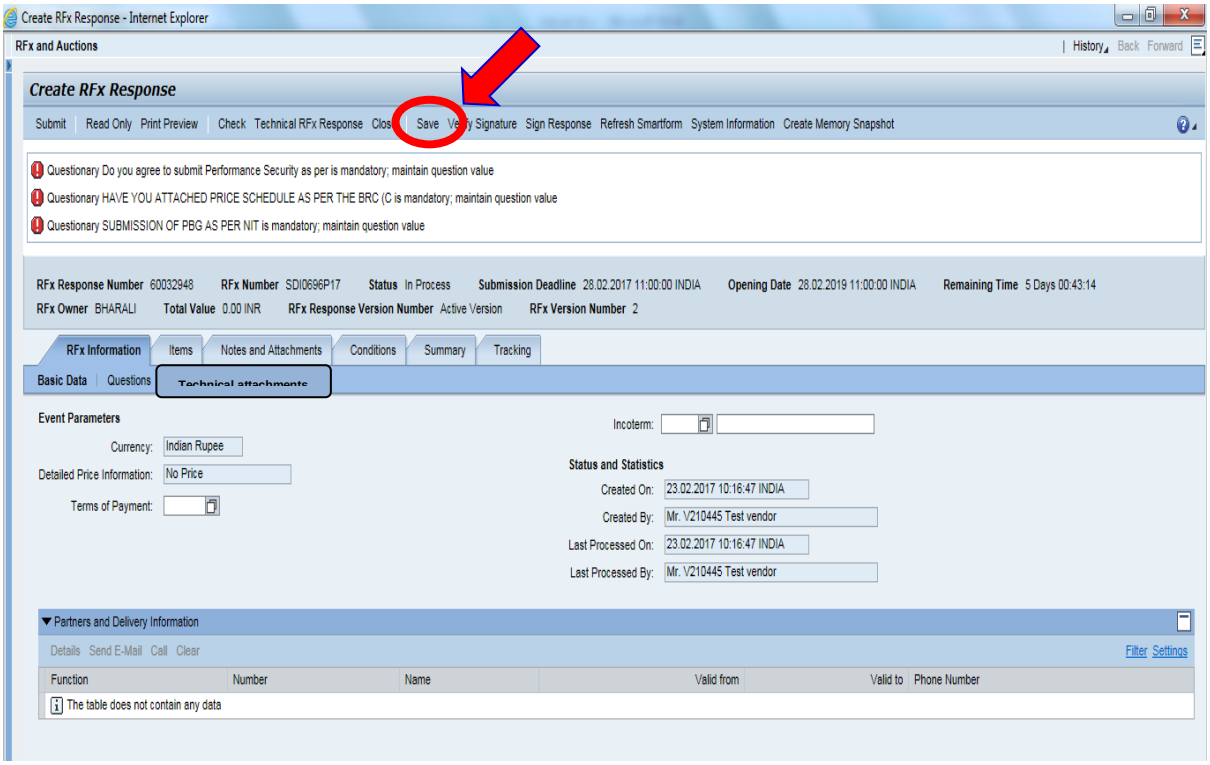


2. Click on the **Create Response** button.



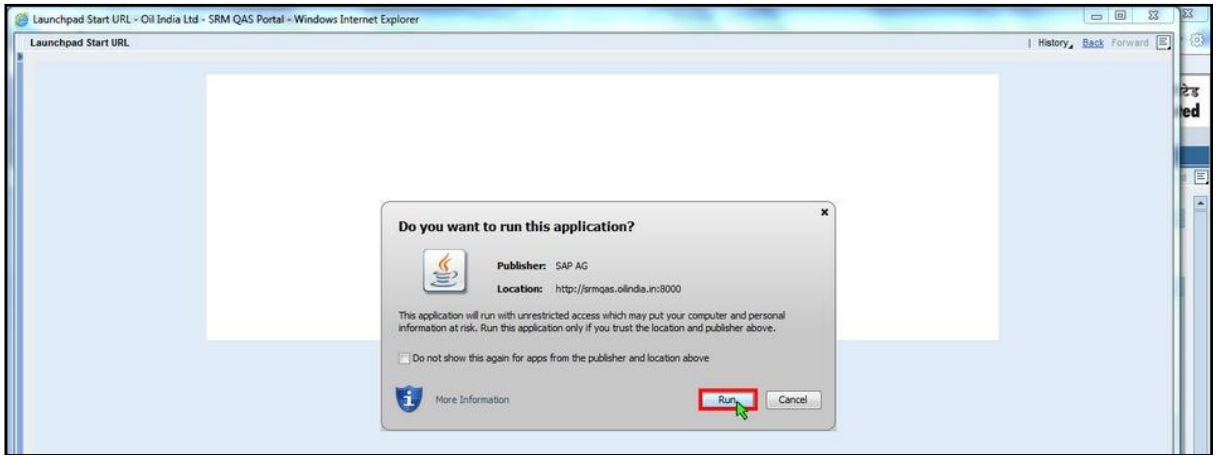
For Response Submission, please ensure that pre-conditions are full filled. In tenders, where Tender fee is applicable, it has to be paid on-line only before the tender fee submission deadline. Once the tender fee part is paid, bidders will get 'Create Response' button through which responses are to be created.

3. Click on **Save** button

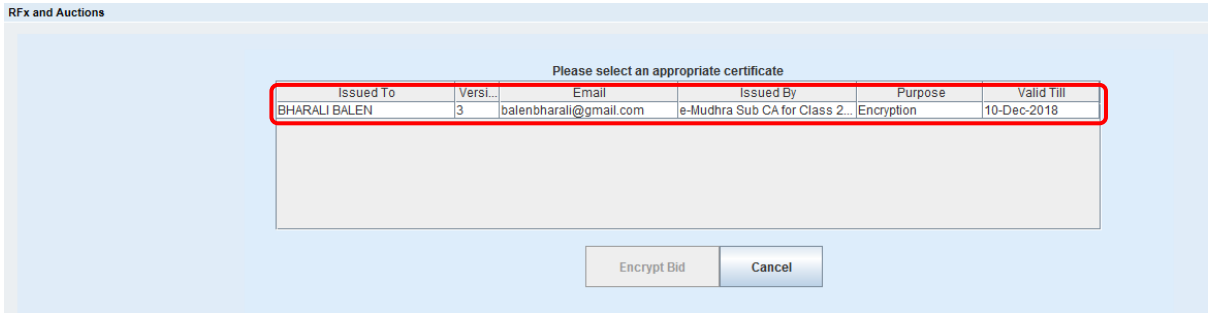


On creating the Response, system will generate a response number. Once it is generated, it is advised to save the number. To work on that, go to **EDIT** mode & bidder can upload/modify till the same is submitted.

4. In case JAVA applet comes, Click on the **Run** button

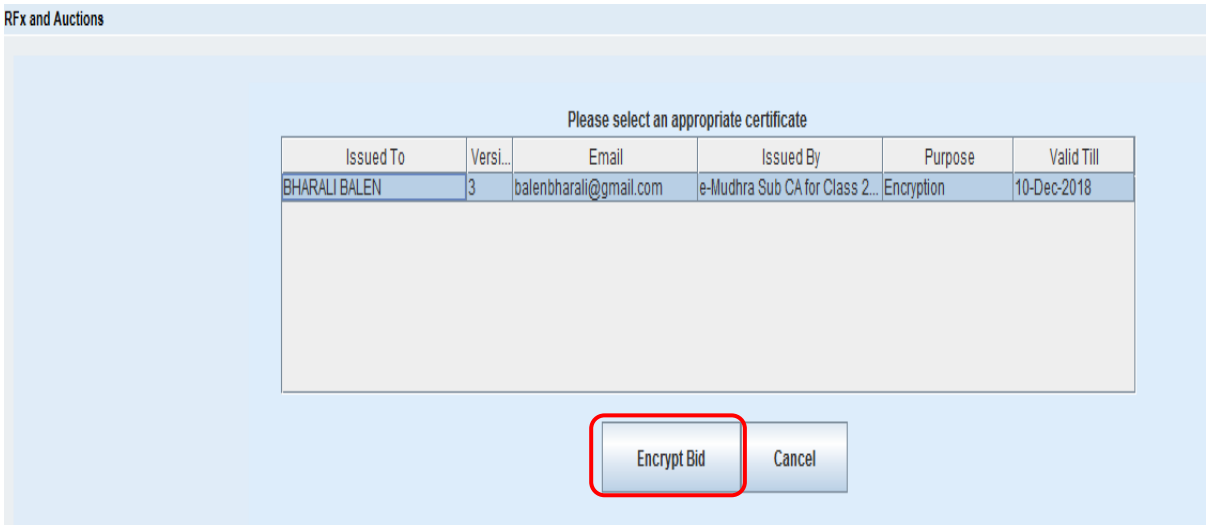


5. Click to select the desired Encryption Key from the list. In this case, select "**Encryption Key**"

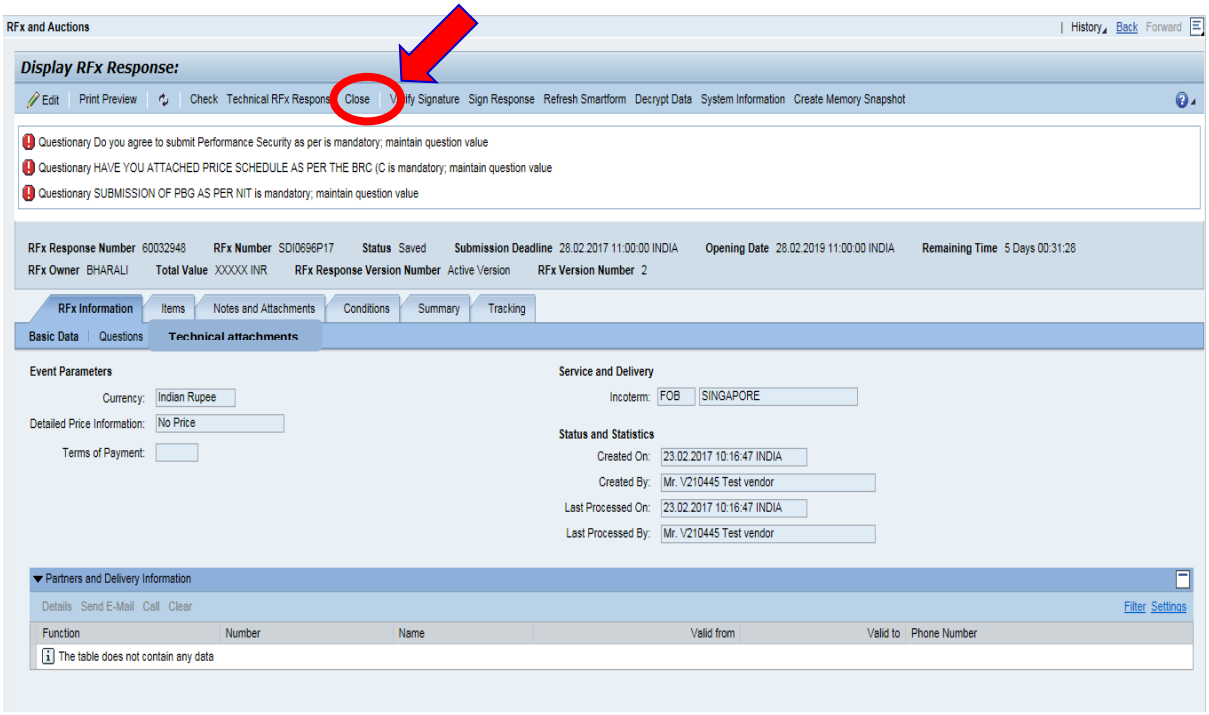


In tender, Encryption Certificate to be used for all the Saved and Edit status. Make sure to install the key having the Encryption Certificate. Please also make sure to install the JAVA latest 32 bit java version on the PC to work with the Encryption/Decryption Process.

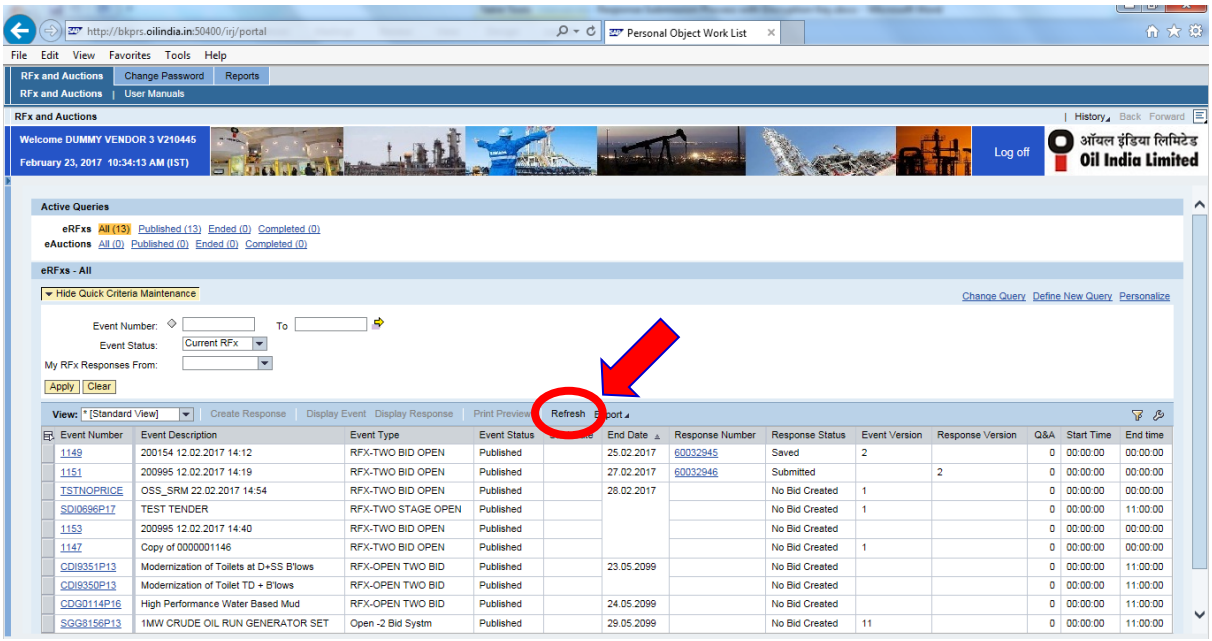
6. Click on the **Encrypt Bid** button.



7. Click on the **Close** button

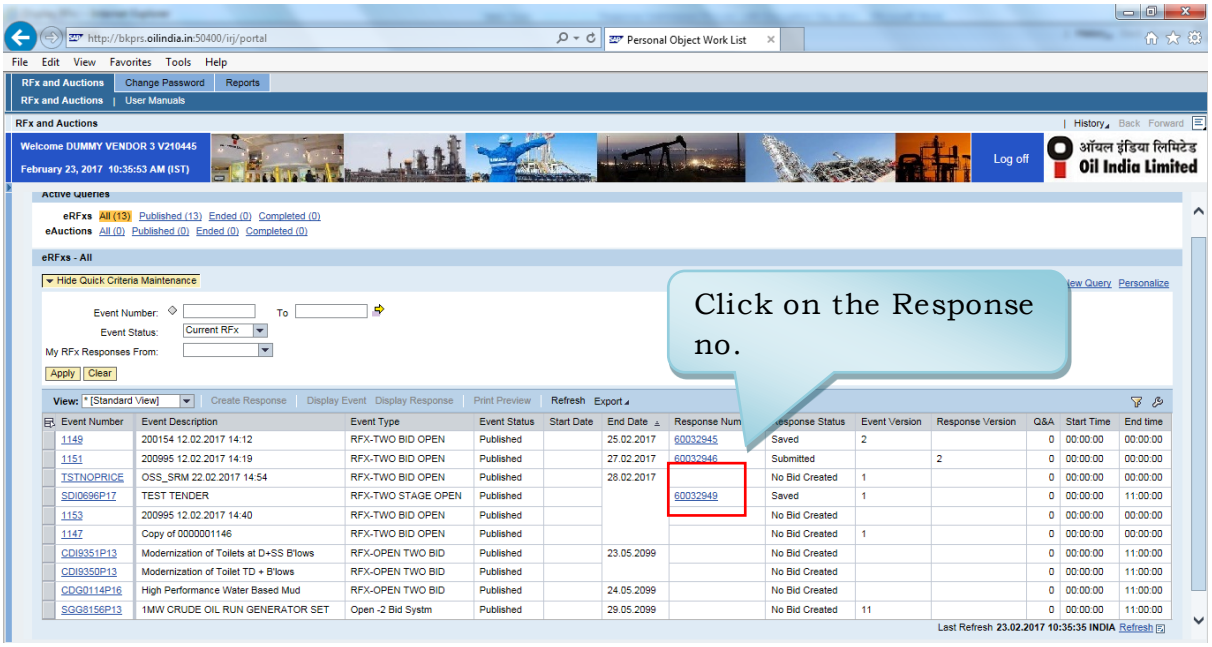


8. Click on **Refresh** button



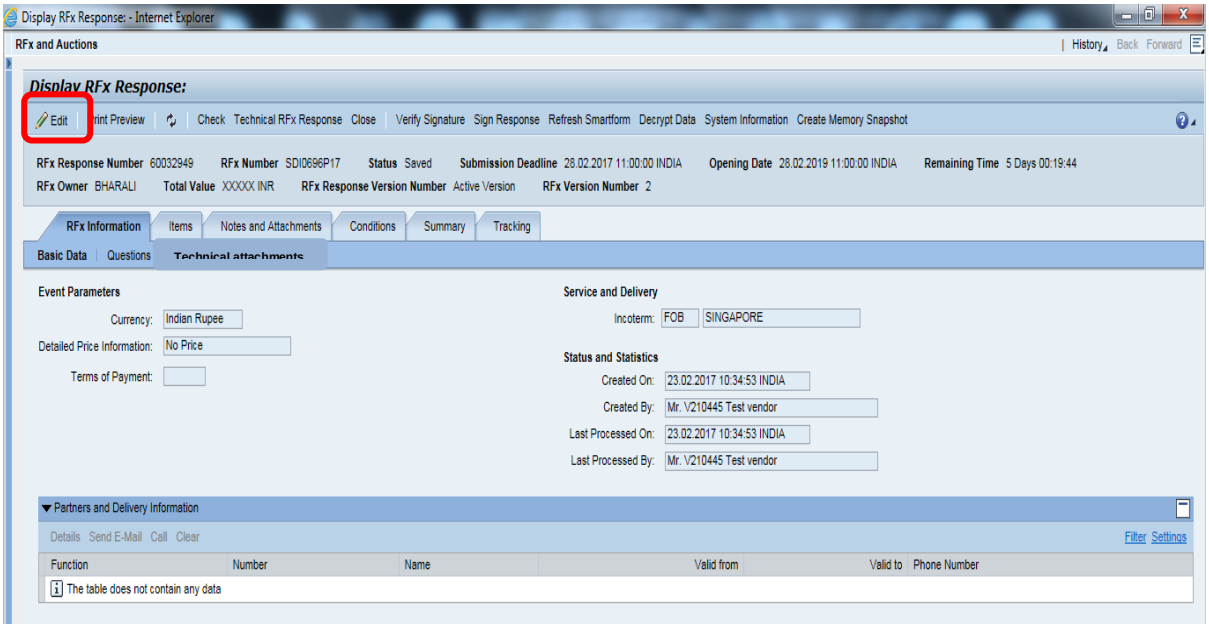
EDIT & DECRYPT RESPONSE

9. After "**Refresh**", the Response created will be displayed against the Event Number/Tender no./Rfx No.. Click on the Response No.



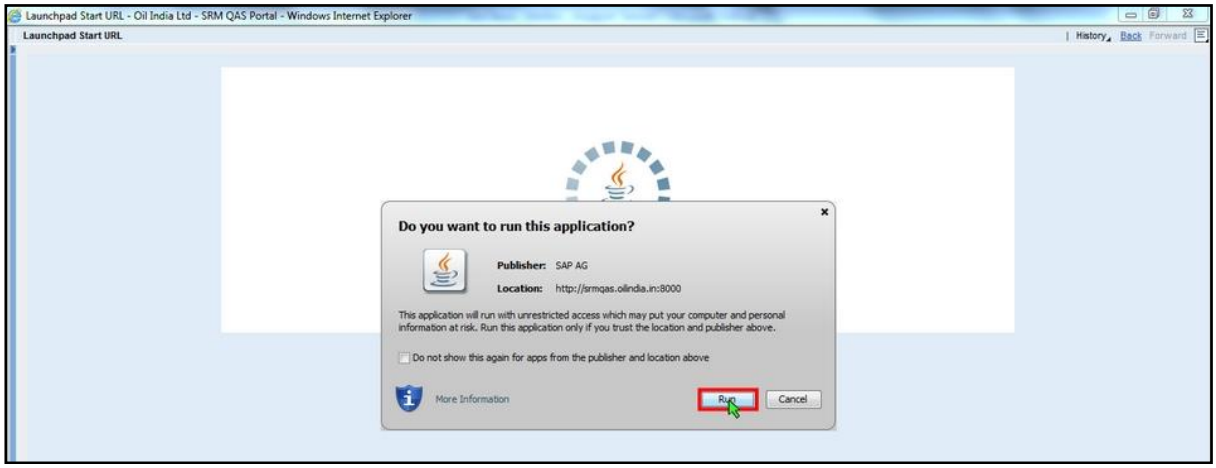
Once a response is saved, it gets updated for the corresponding tender. One can work directly by going to the EDIT mode or can come from the first screen as shown here.

10. Click on **Edit**

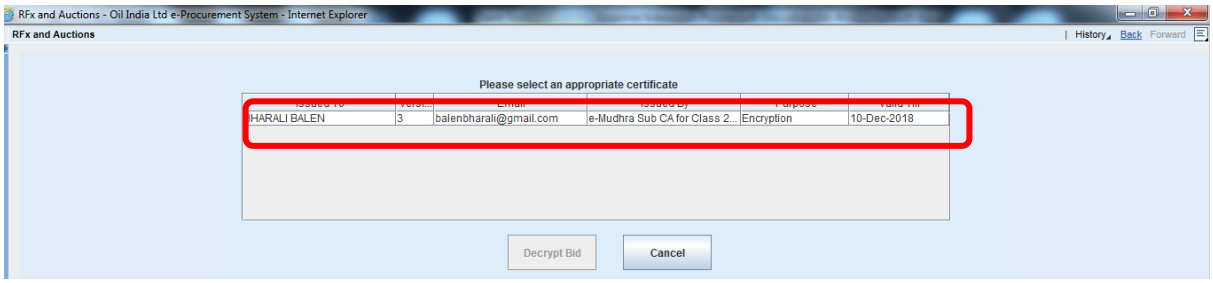


In Edit mode, system will prompt for the Encryption/De-Cryption Certificate for the Decryption process.

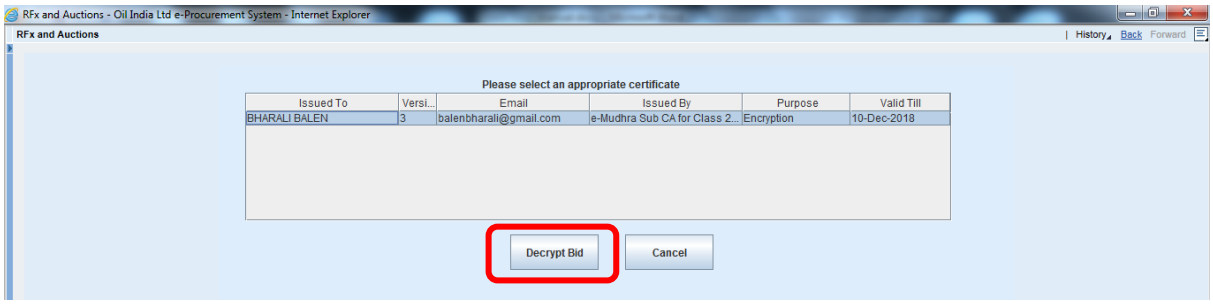
11. Click on the **Run** button.



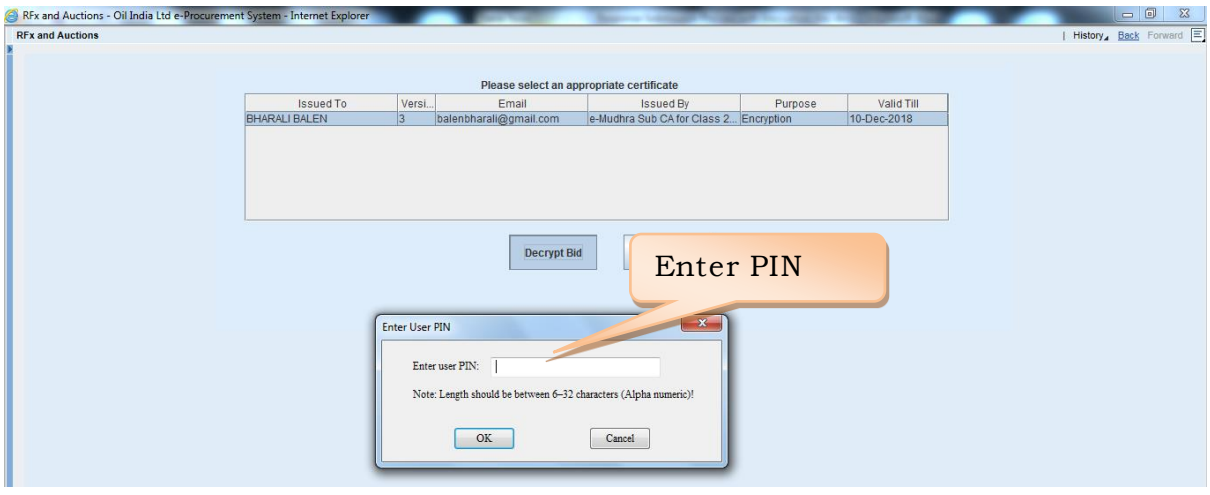
12. Click to select the same Certificate used for Encryption to De-Crypt



13. Click on the **Decrypt** button.



14. Enter **DSC Pin** and press **OK**

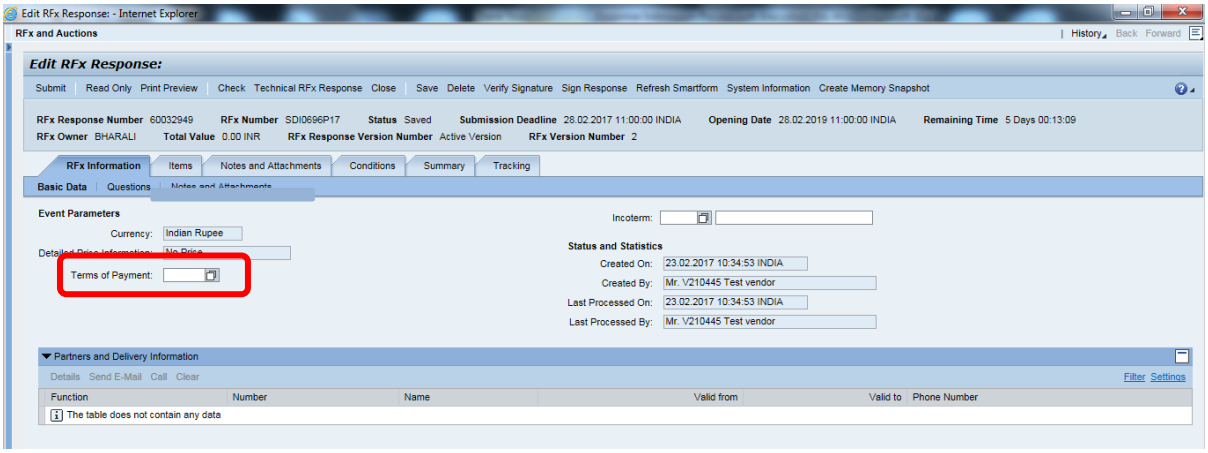


Notes

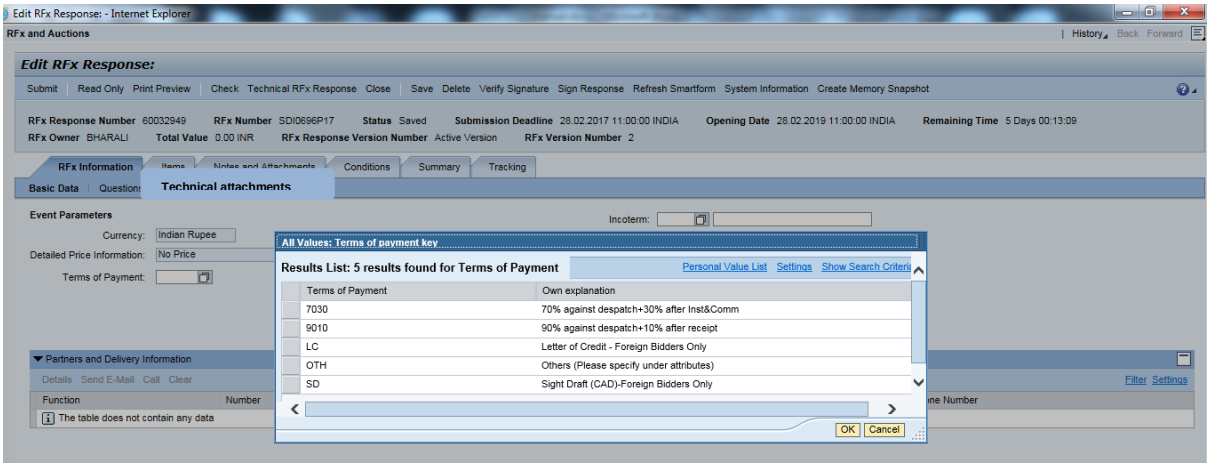
- All the processing of uploading technical and commercials will be as per the existing process except the use of Encryption Certificate. It is being demonstrated here.
- Kindly check what is maintained under the detailed Price Information. It will guide the pricing method. If price is not available, then prices to be uploaded as per the Price Bid Format. If it says Price with Condition or Simple Price, the prices to be maintained on line.
- This process will be explained here. For the rest of the submission process see the process as demonstrated.

PAYMENT TERM & INCOTERM

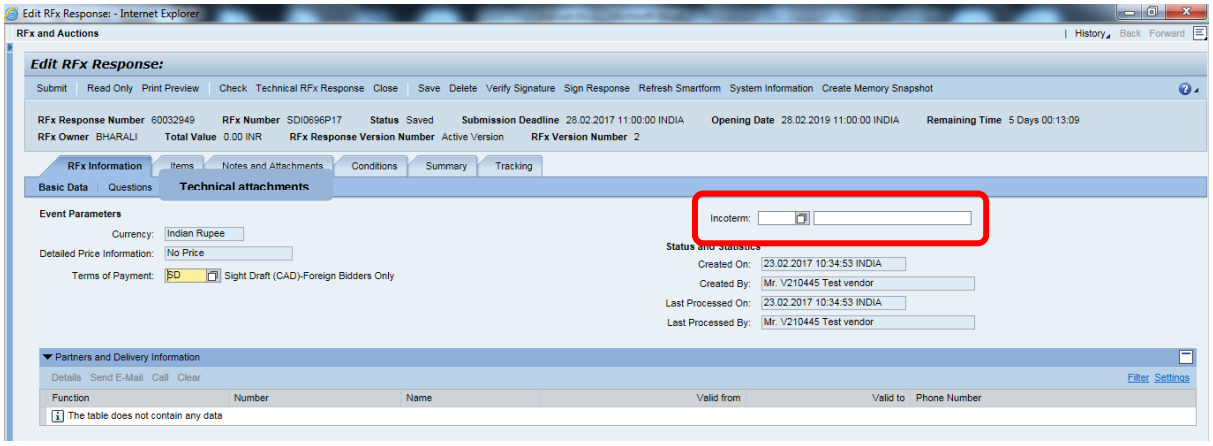
15. Click on the possible entry button of **Terms of Payment** field.



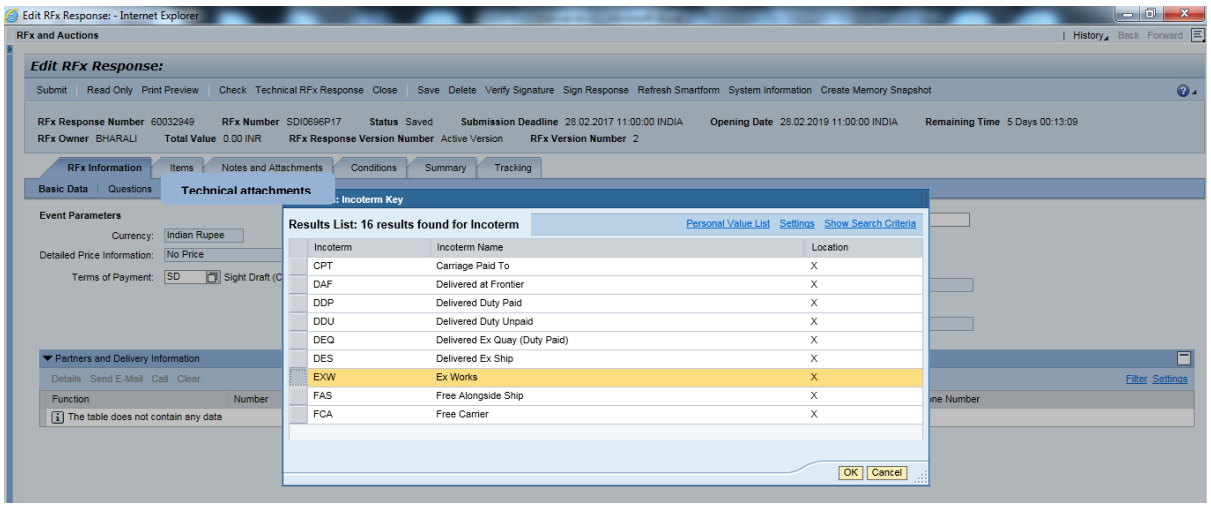
16. Select the desired **Terms of Payment** from the list



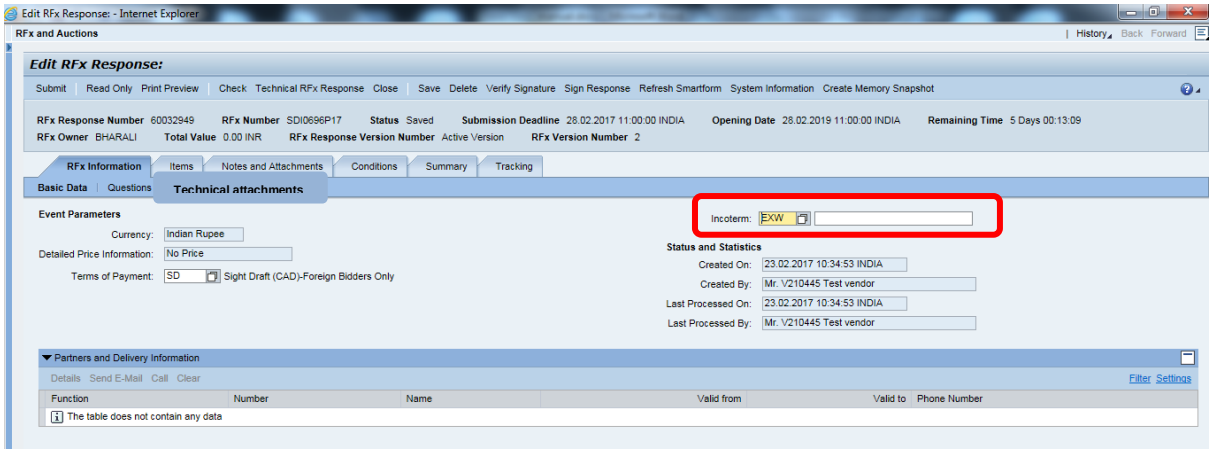
17. Click on the possible entry button of **Incoterm** field



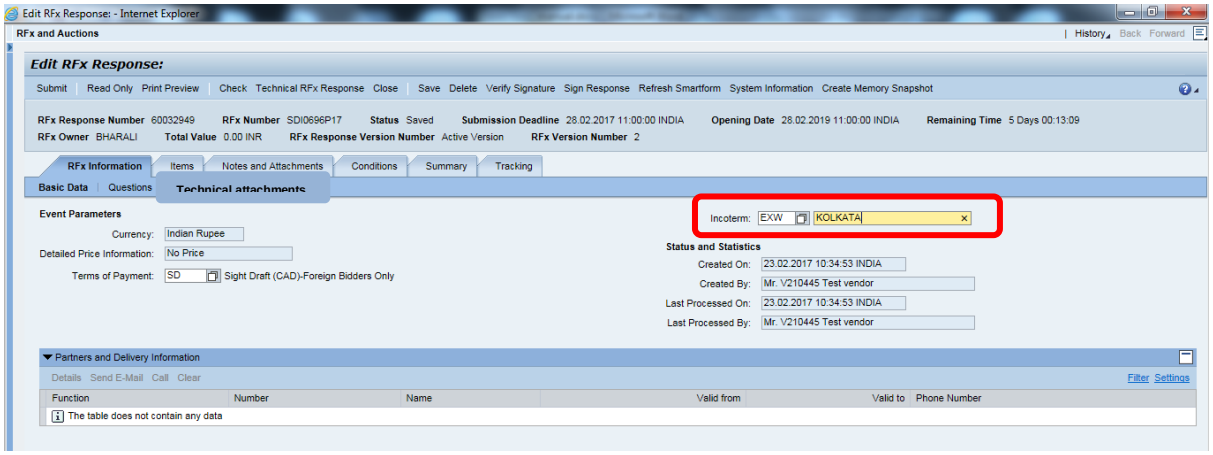
18. Select the desired **Incoterm** from the list



19. Click in the **Incoterm Location** field

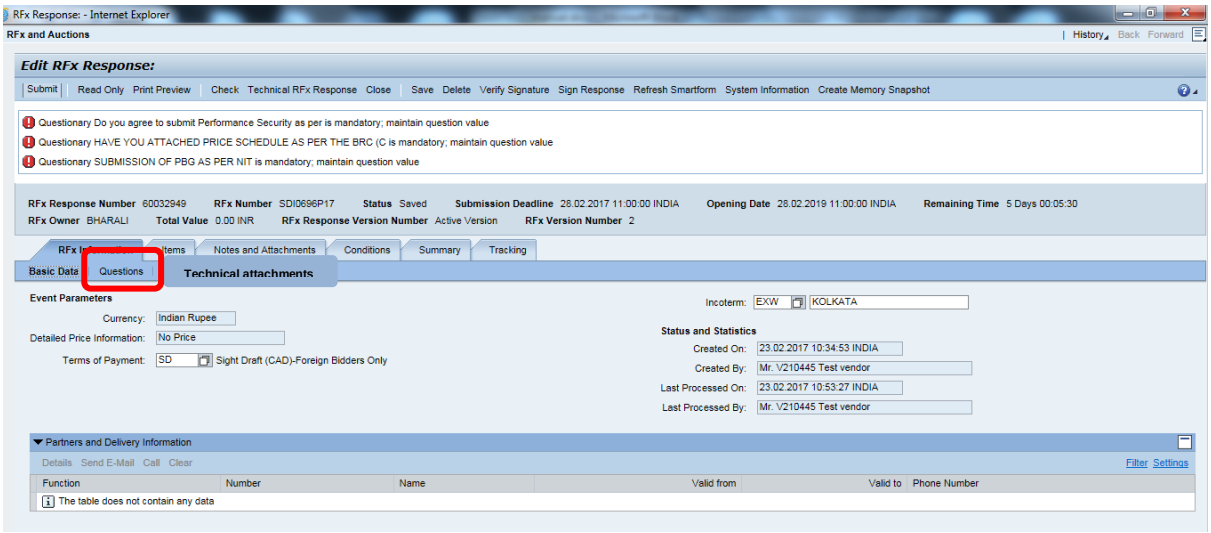


20. In the **Incoterm Location** field, enter the desired Incoterm Location

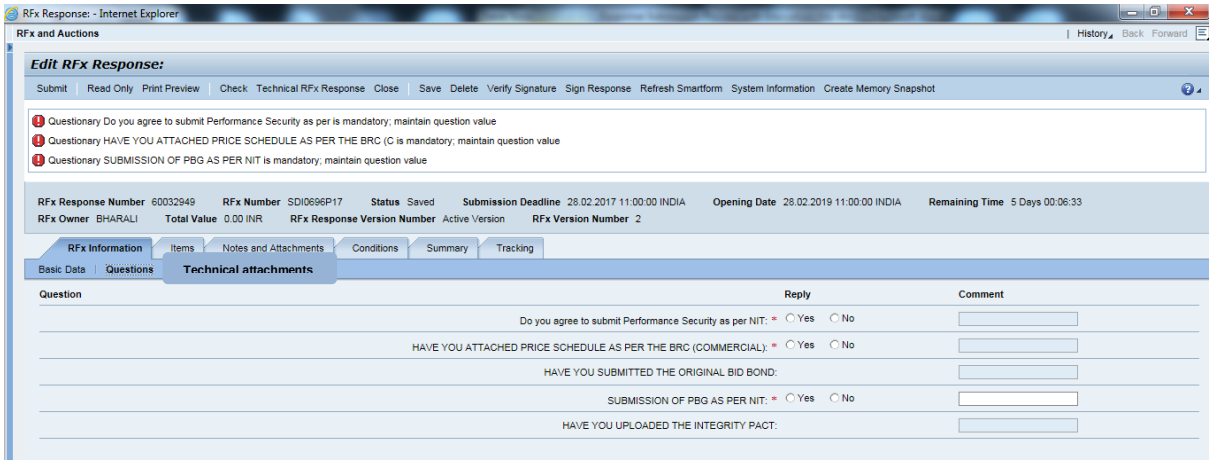


FILL UP QUESTION

21. Click on **Questions**



22. Fill up the Question, if any.

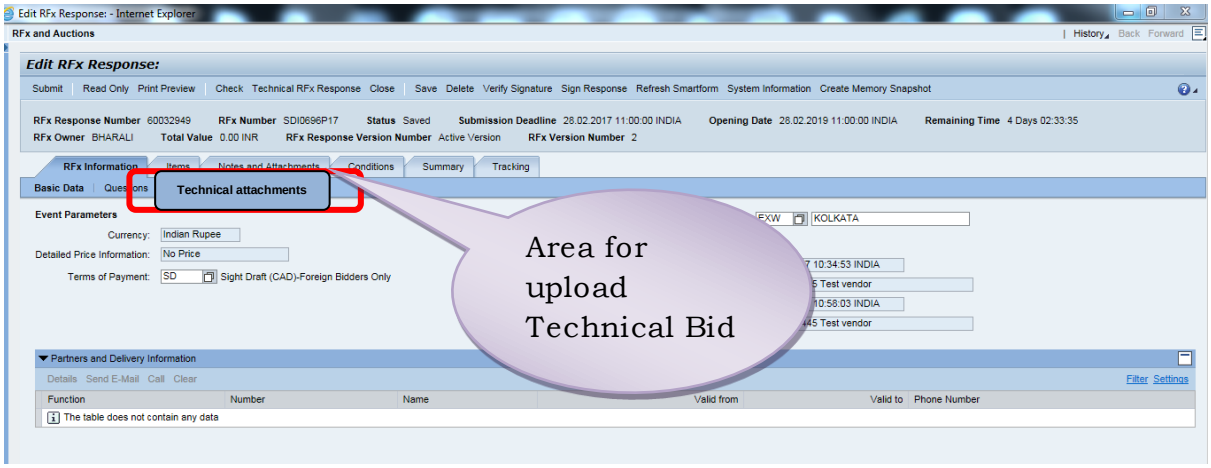


NOTE: Sometime in some tender questions are not maintained. In such cases bidder may not require to fill any questions.

UPLOAD TECHNICAL DOCUMENTS

23. Technical Bid Upload:

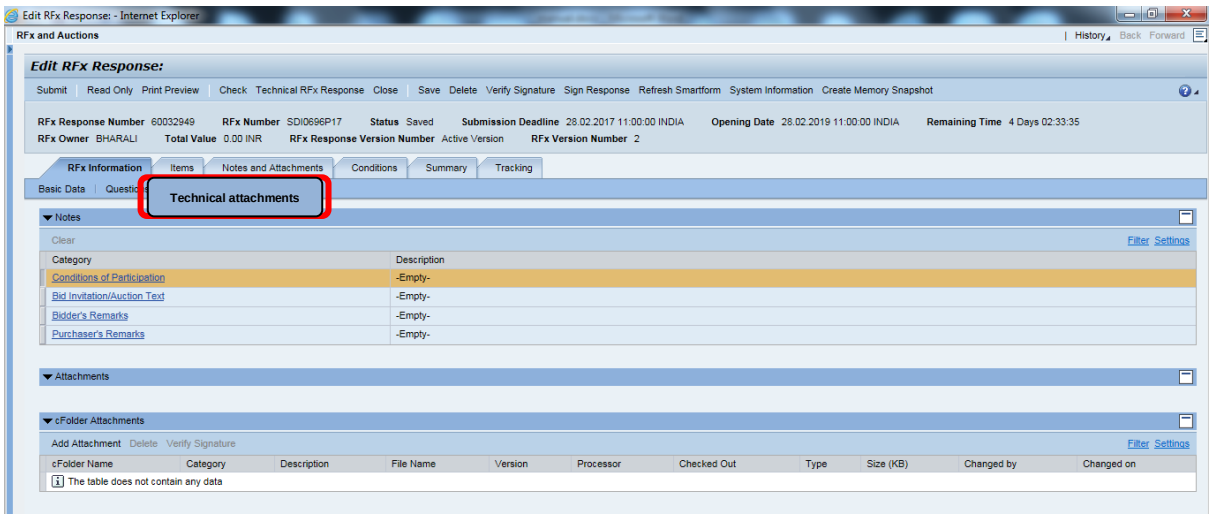
Technical files to be added under RFX Information >"Technical Attachments"

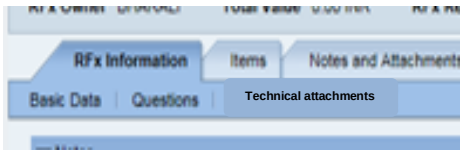


NOTES:

a. **System will allowed any file like doc, pdf, xls, jpg etc.**
b. **Signed file should be less than 10 MB. However, it is advisable to upload smaller file only.**

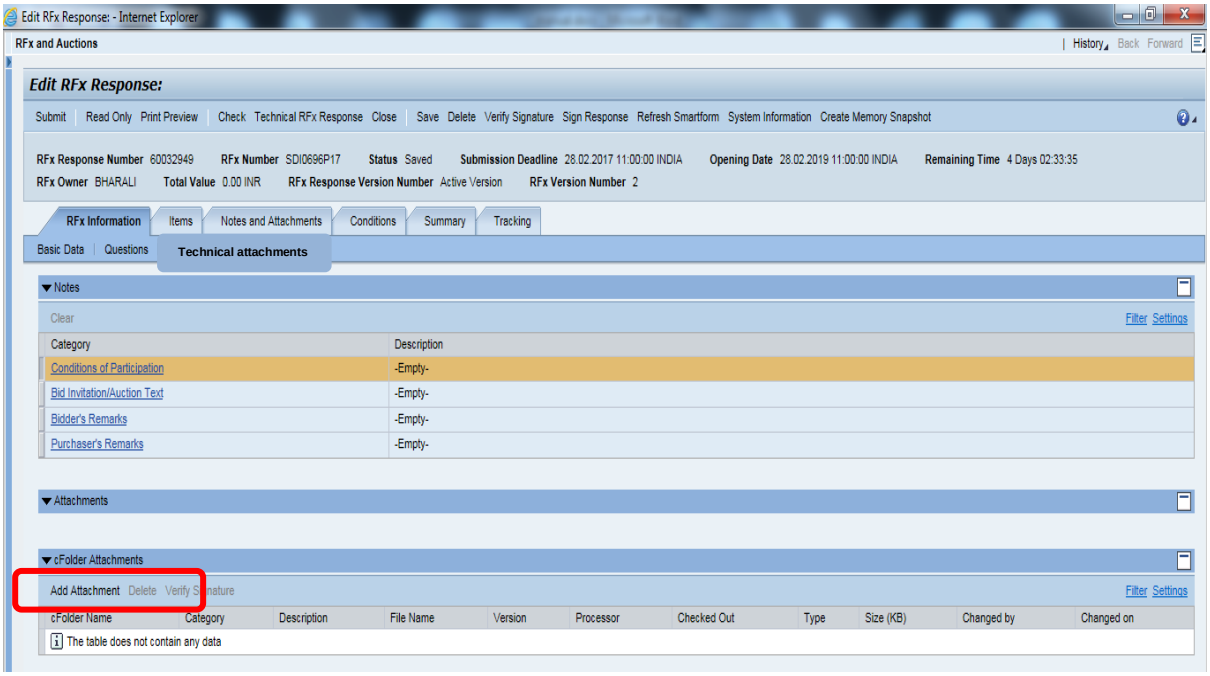
24. Click "**TECHNICAL ATTACHMENTS**" under Rfx Information



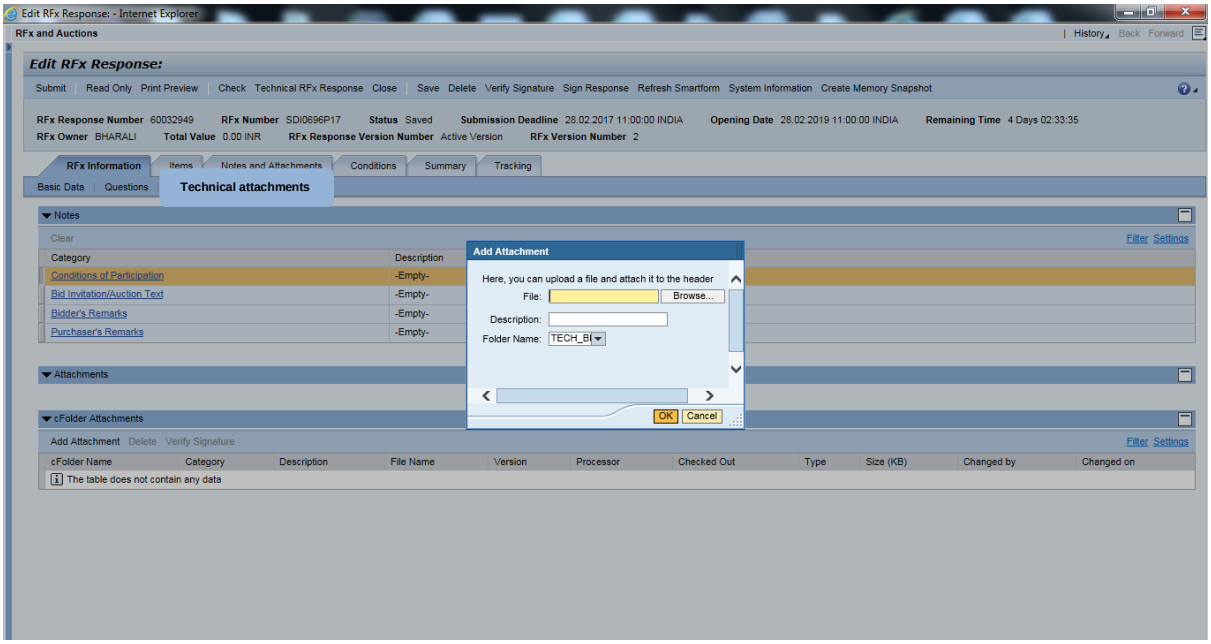


The area "**TECHNICAL ATTACHMENTS**" under "RFx Information" is used for uploading **Techno –Commercial Un-price Bid Only**. No price to be upload these are until and unless calls for particular tender.

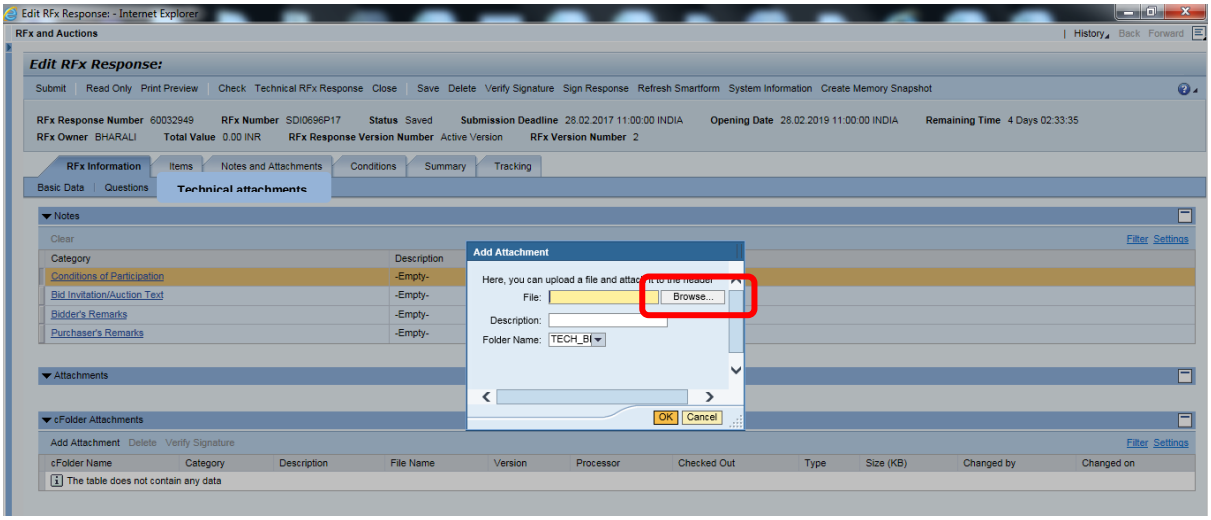
25. Click "**Add Attachment**"



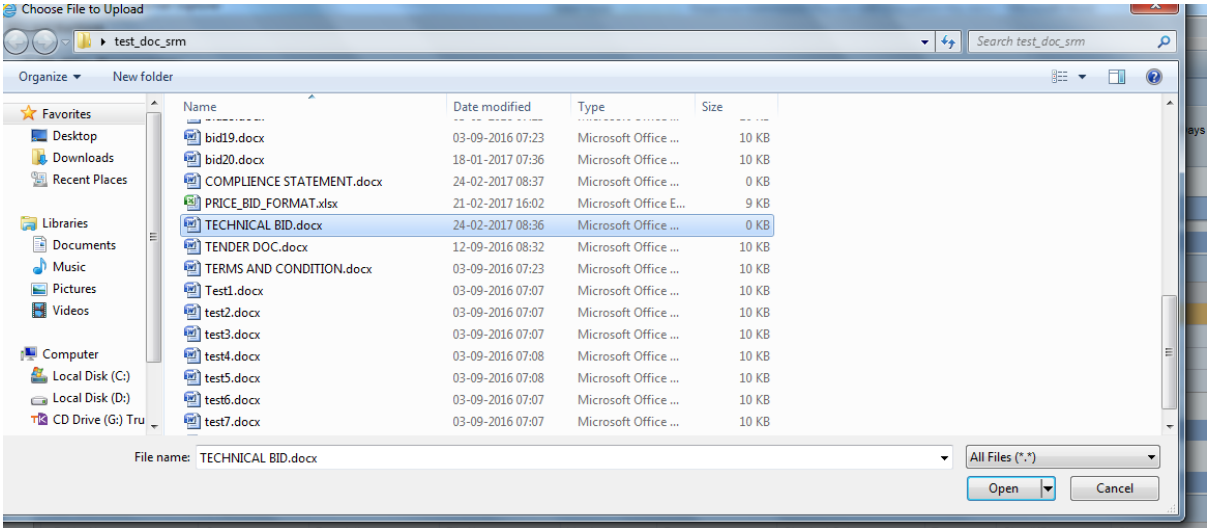
26. Screen after click add attachment



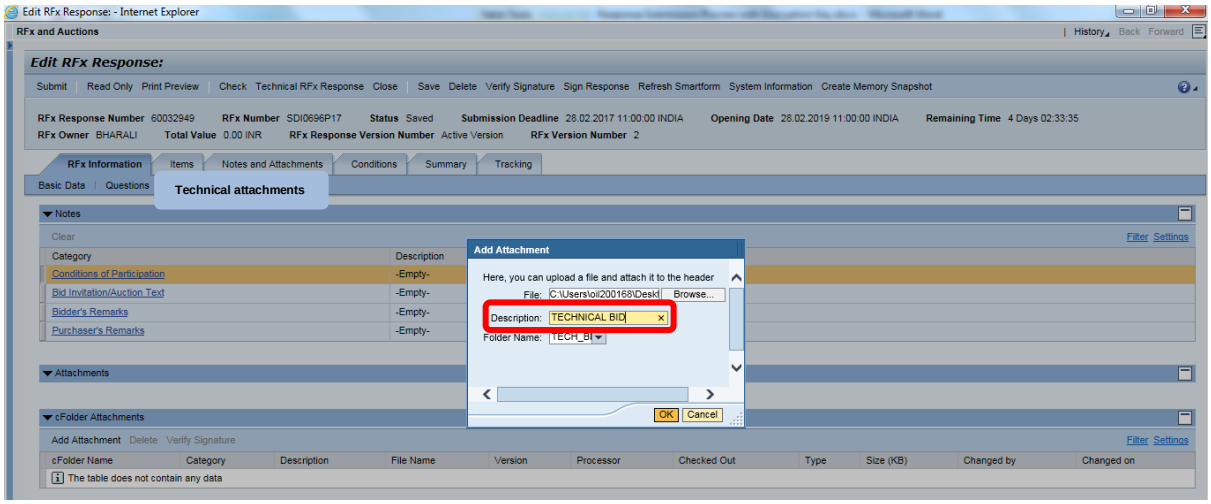
27. Click on the **Browse** field.



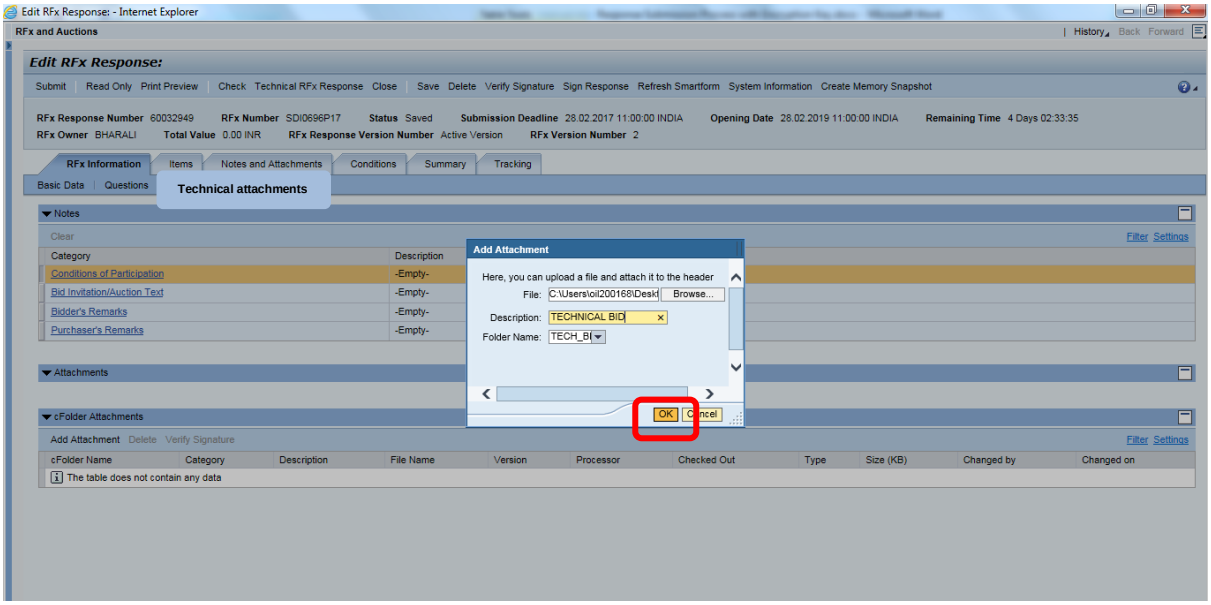
28. Select the file from the local PC **[TECHNICAL BID].** Double-click on the selected file. **Please note the signed file less than 10 MB.**



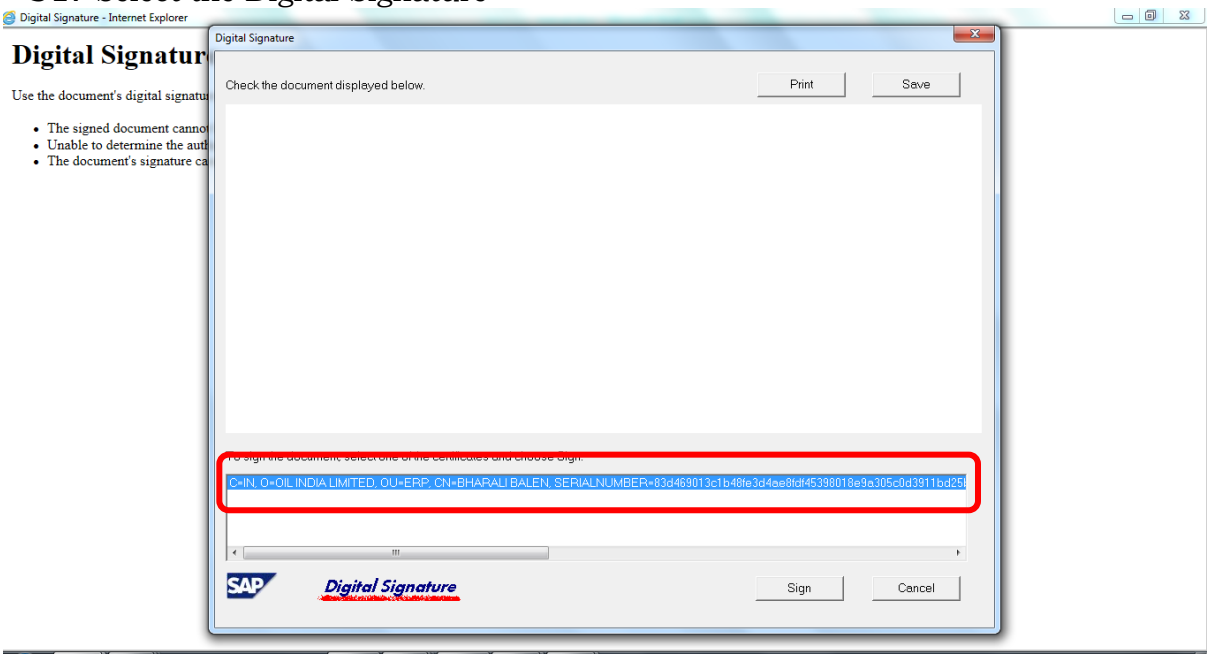
29. Fill up Description



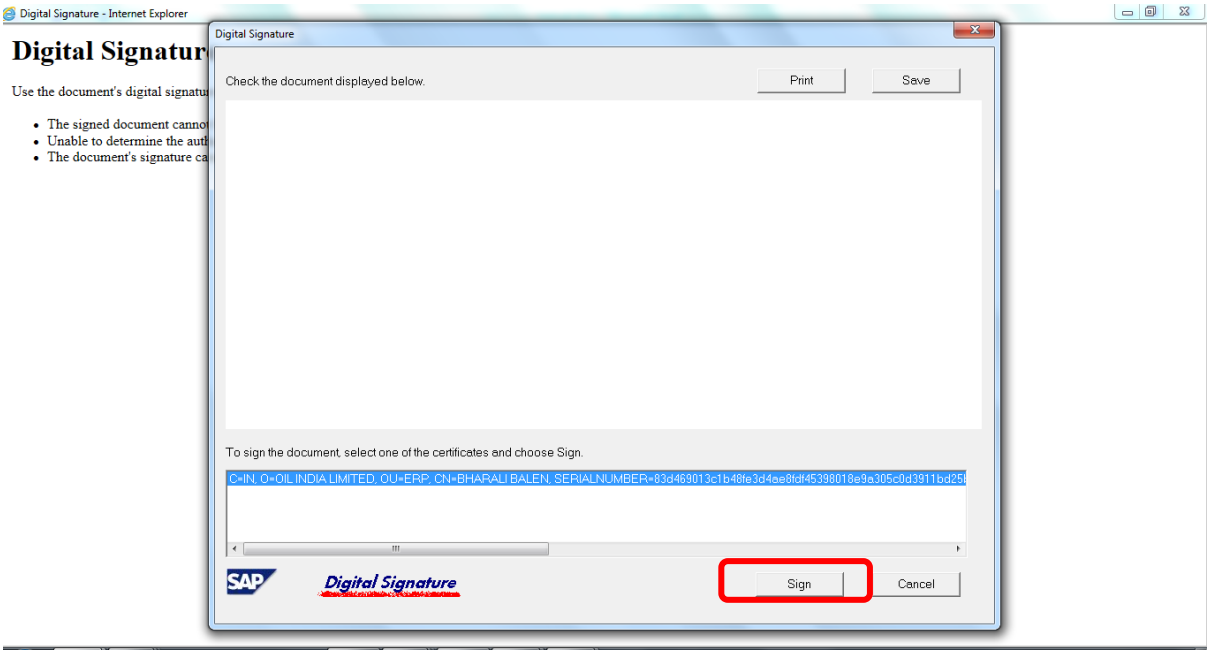
30. Click **OK**



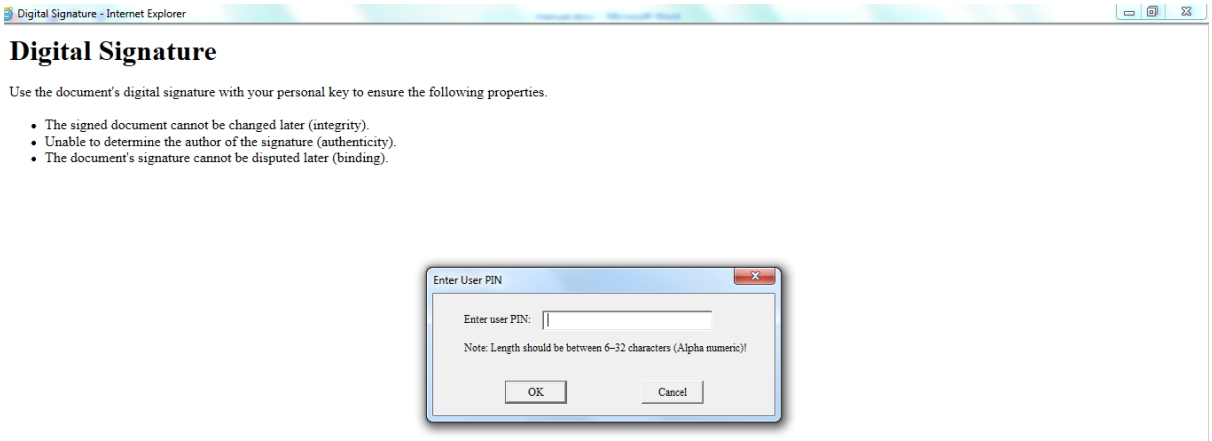
31. Select the Digital Signature



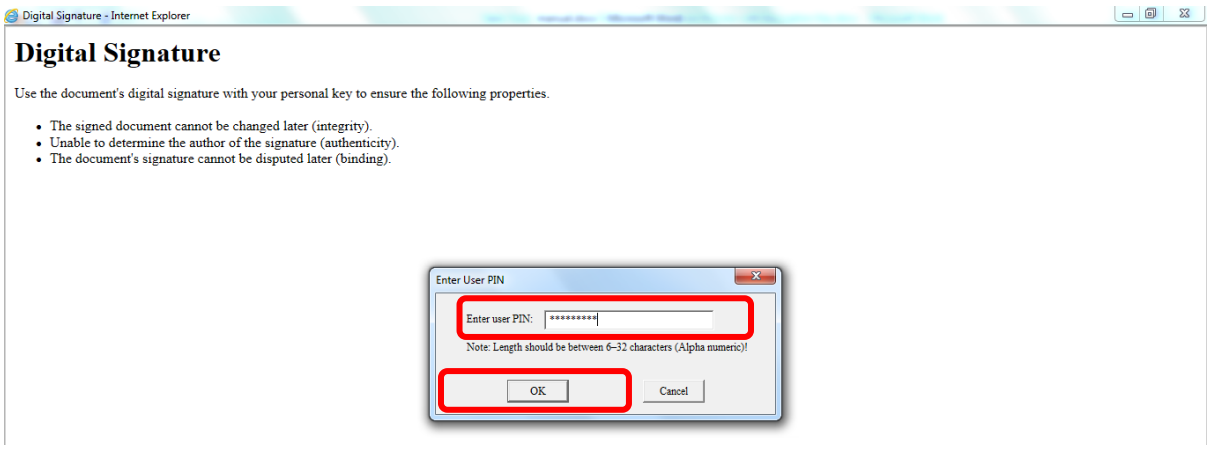
32. Click **Sign**



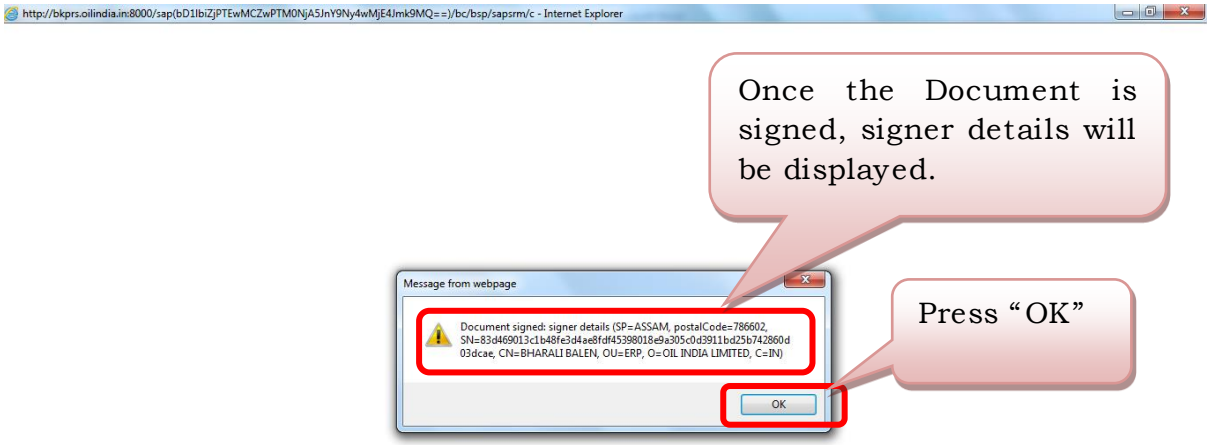
33. Screen after click Sign



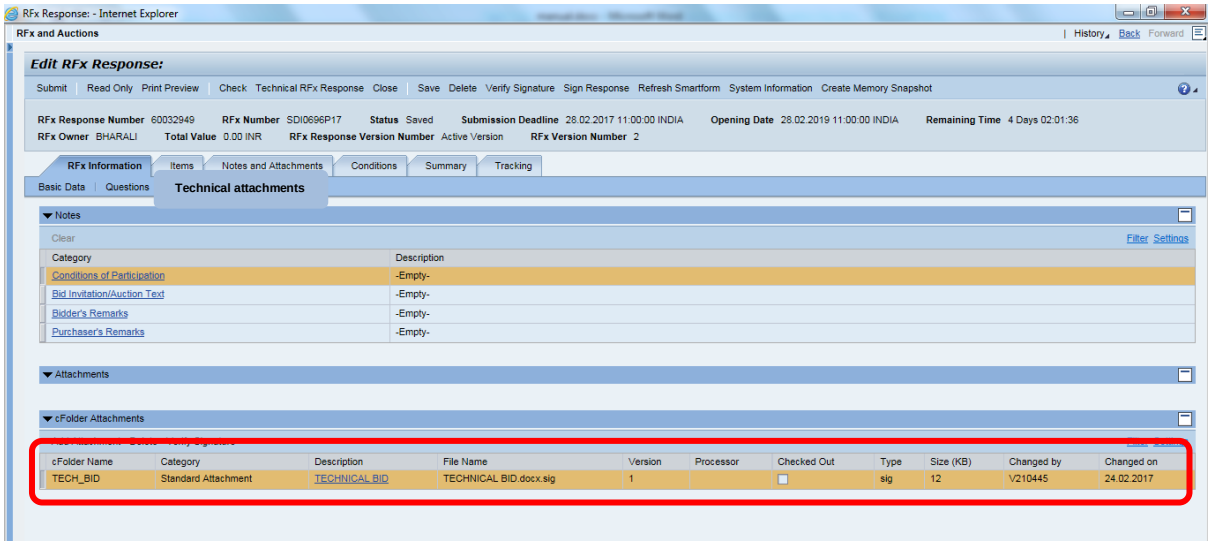
34. Enter **PIN** for Digital Signature and Press **OK.**
[PIN is the Password of the Signature Token.]



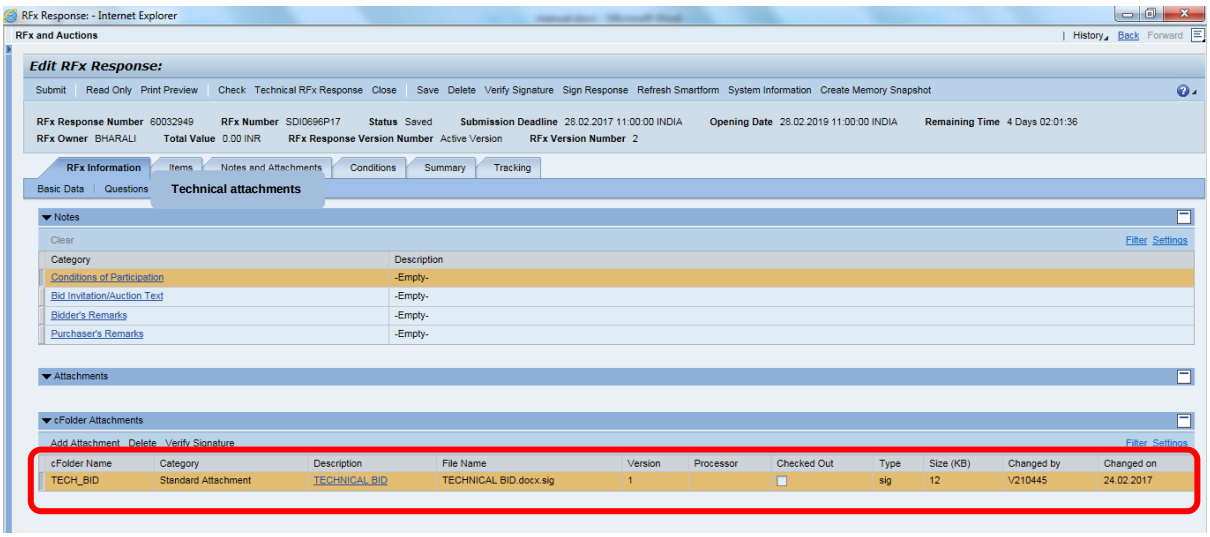
35. Documents Signed and Details of the Signer will be displayed. Press **OK**



36. Technical Documents Uploaded Successfully

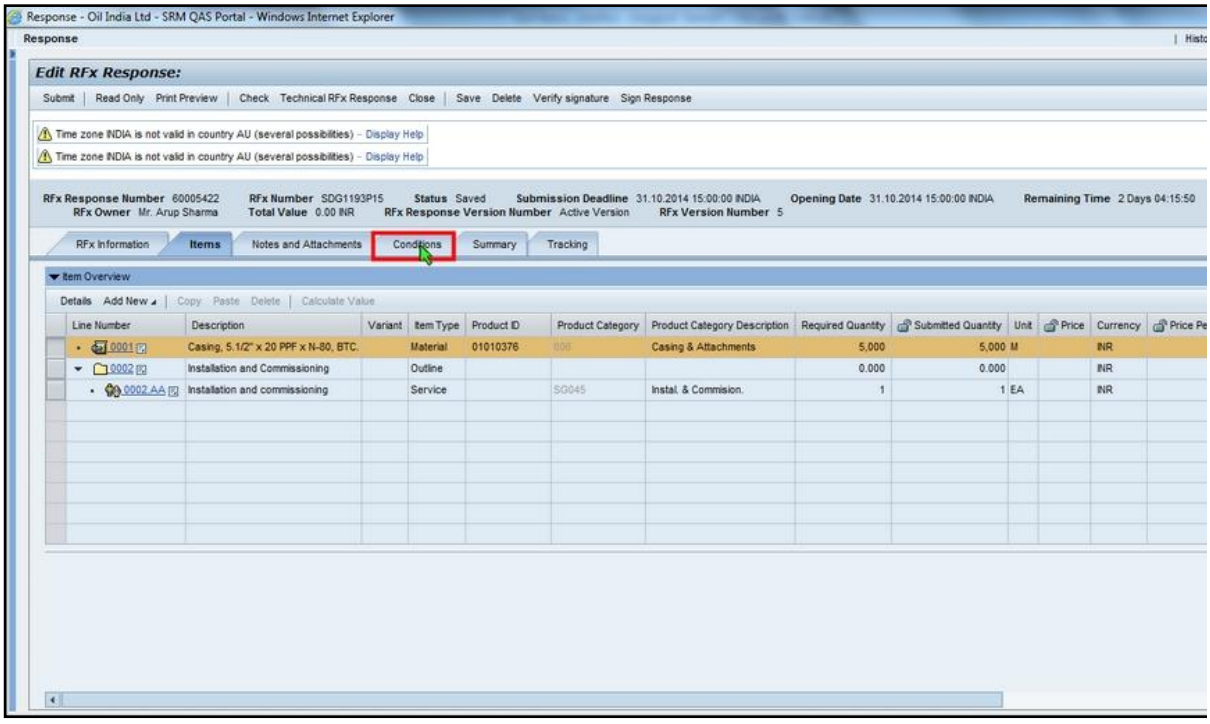


37. The uploaded files should be displayed with file name. In the same way upload all the technical files one-by-one through the '**Add Attachment**' button as explained. Once all the files are uploaded then click on the **Save** button & close the screen and reopen to edit.

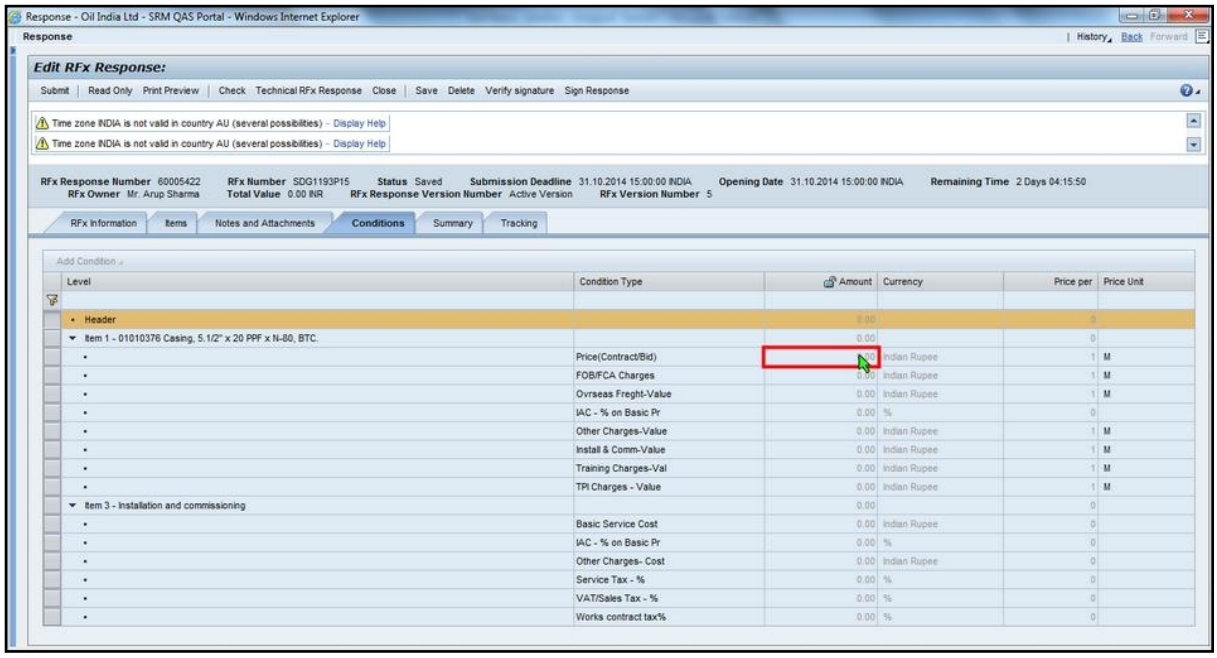


UPLOAD PRICE BID

38. Select the **Conditions** tab.

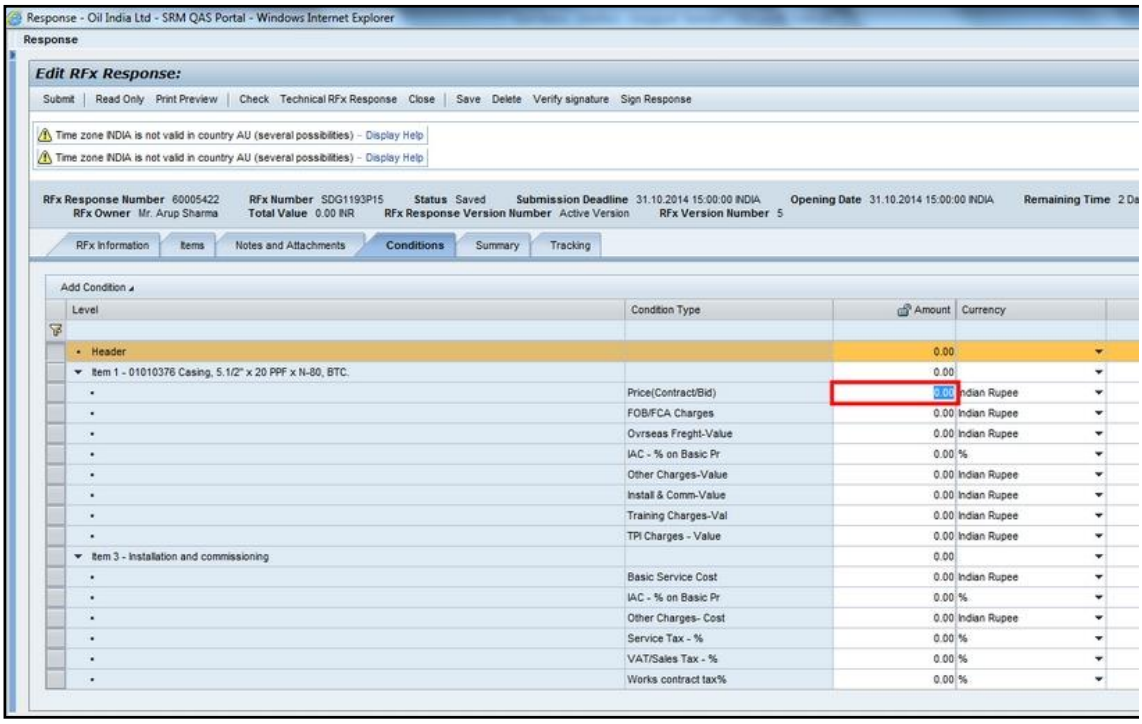


39. Click in the **Amount** field



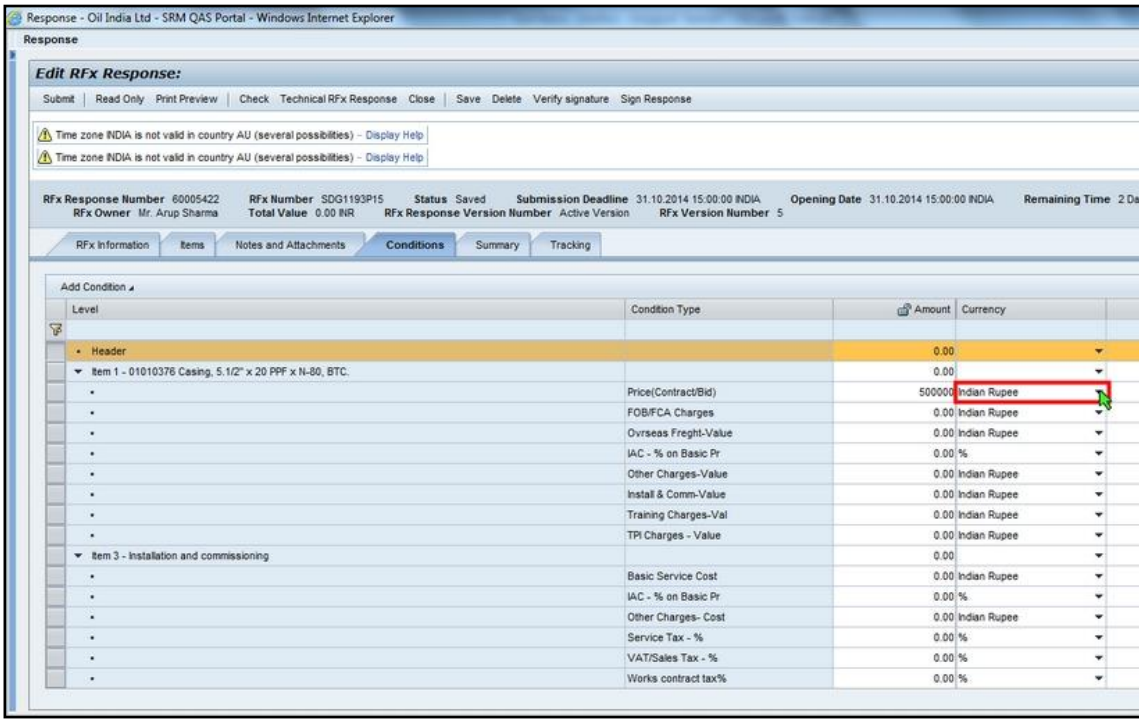
40 In the **Amount** field, enter the desired Amount. In this case, enter "**500000**".

.

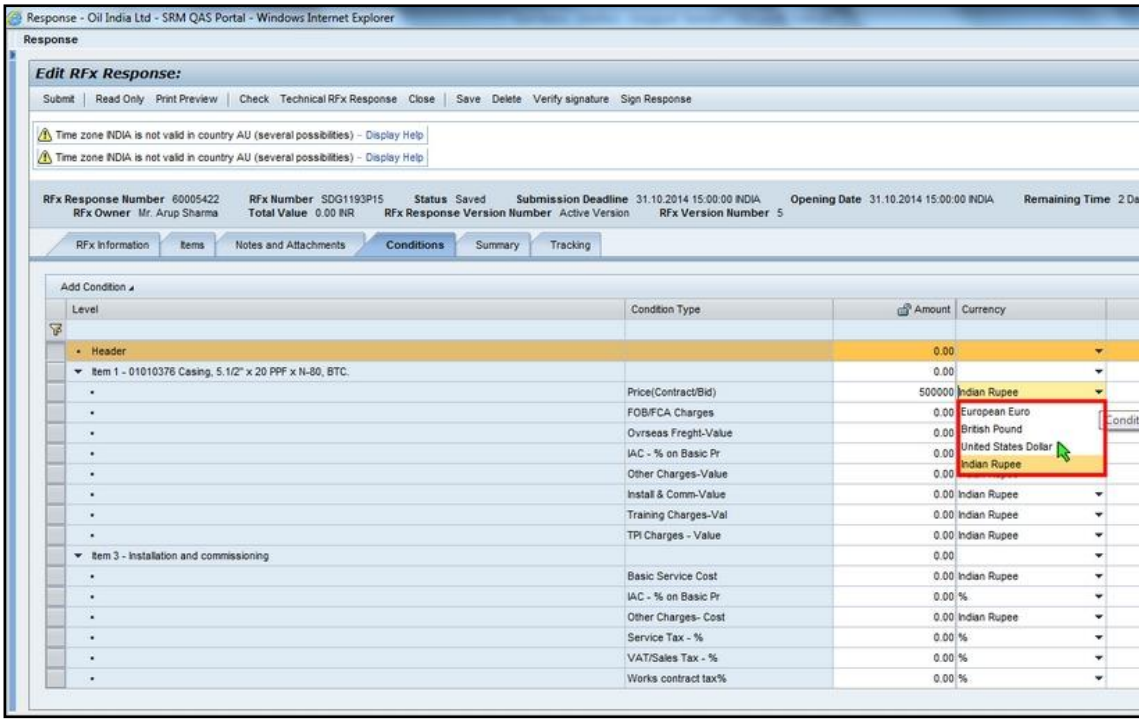


41 Click to drop down the **Currency** list.

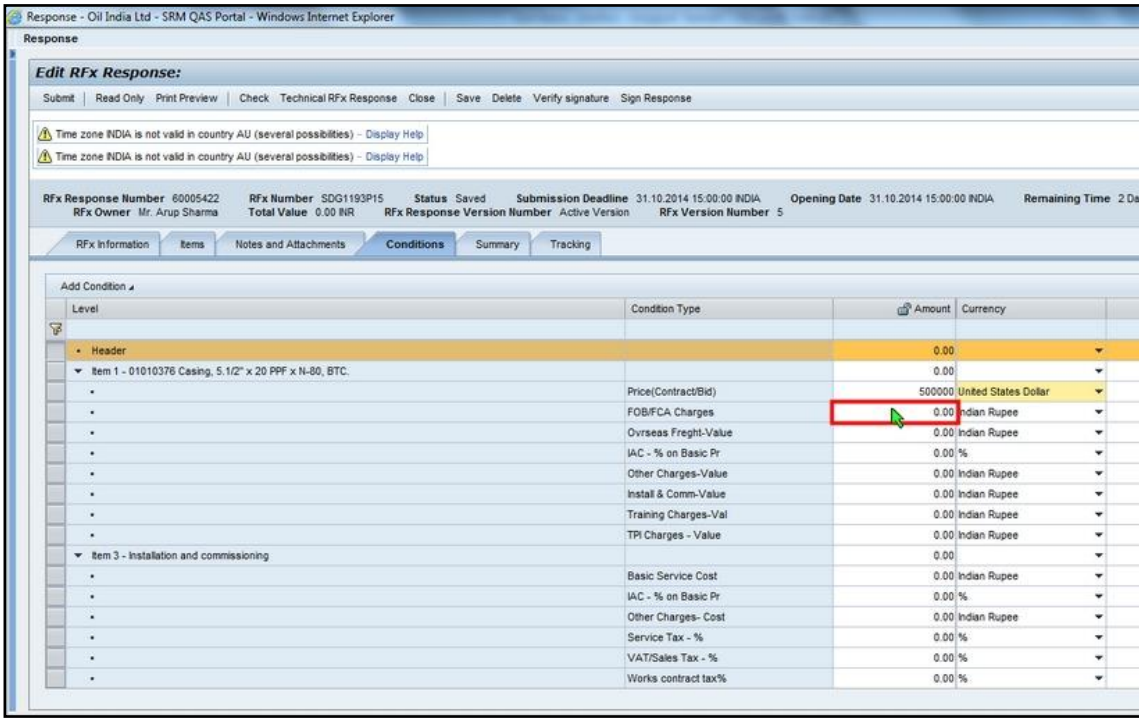
.



42. Select the desired **Currency** from the list. In this case, select "**United States Dollar**"

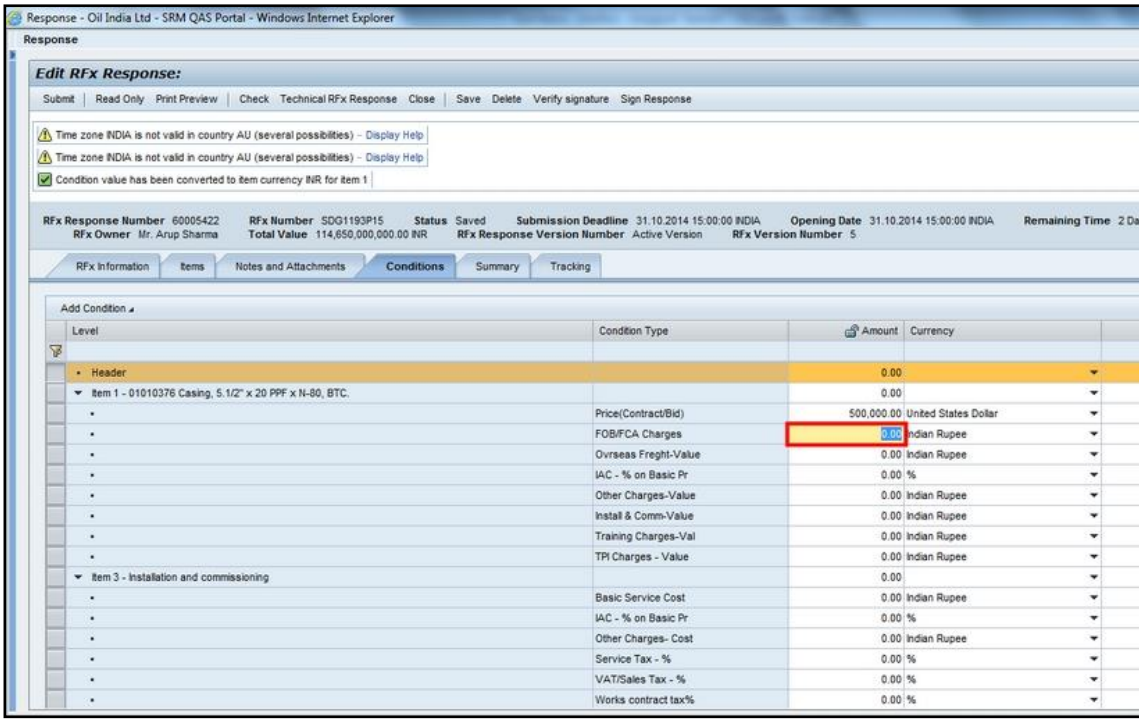


43. Click in the **Amount** field.



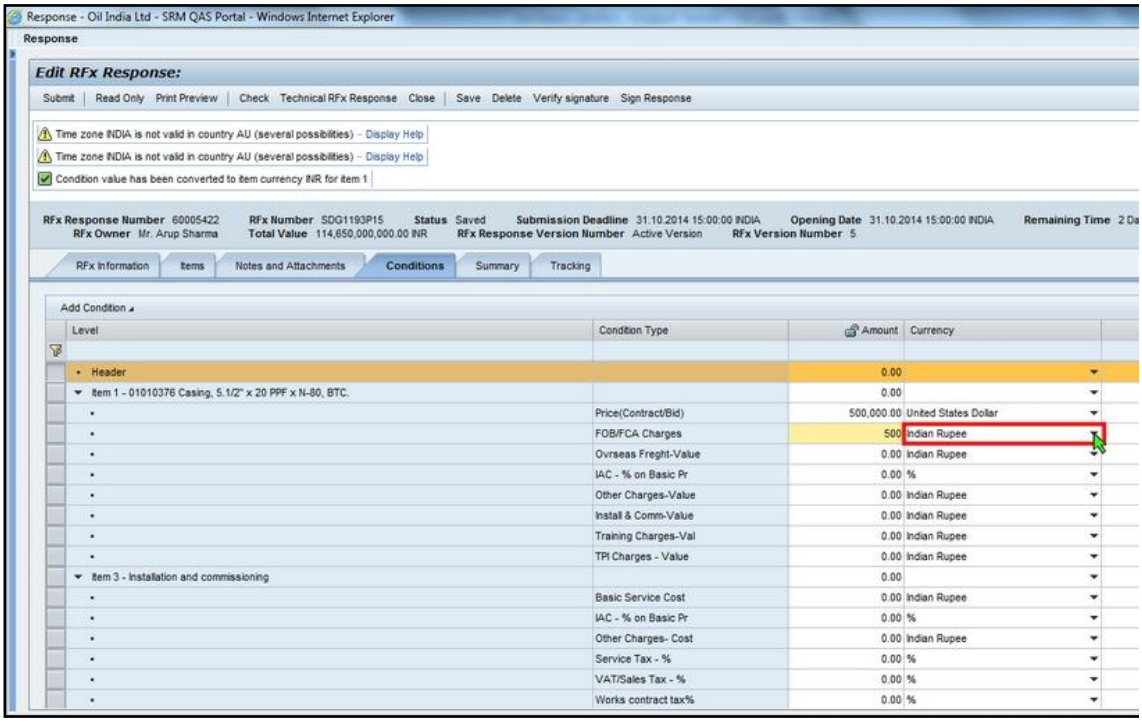
44 In the **Amount** field, enter the desired Amount. In this case, enter "**500**".

•

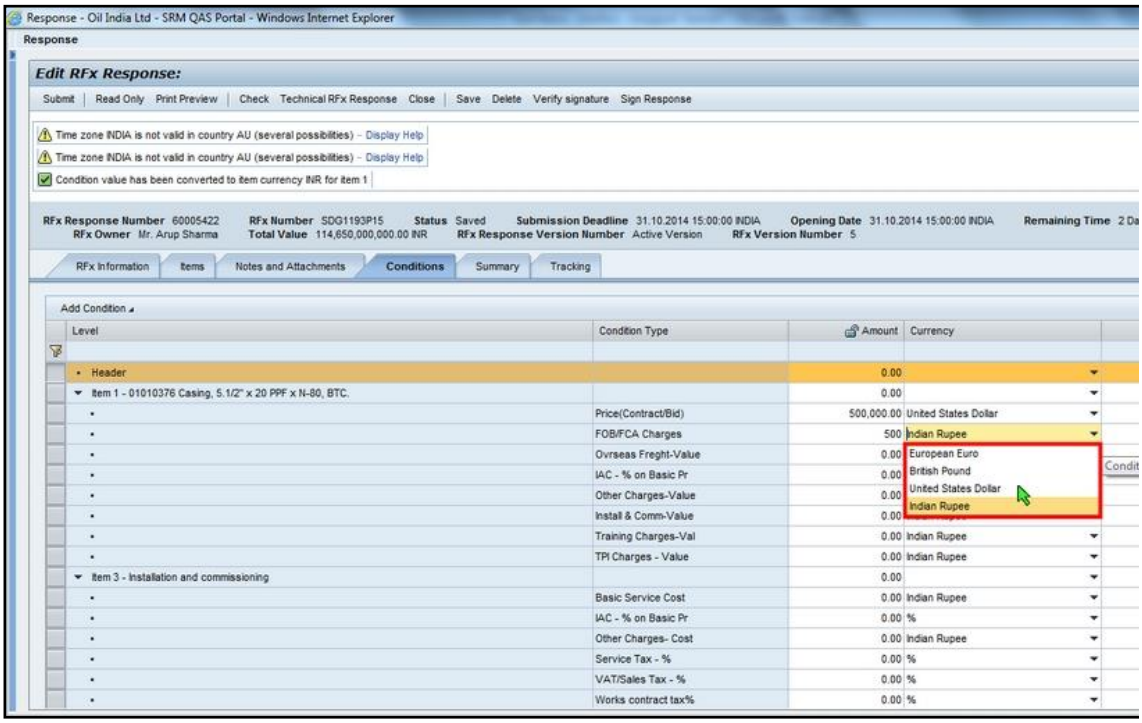


45 Click to drop down the **Currency** list.

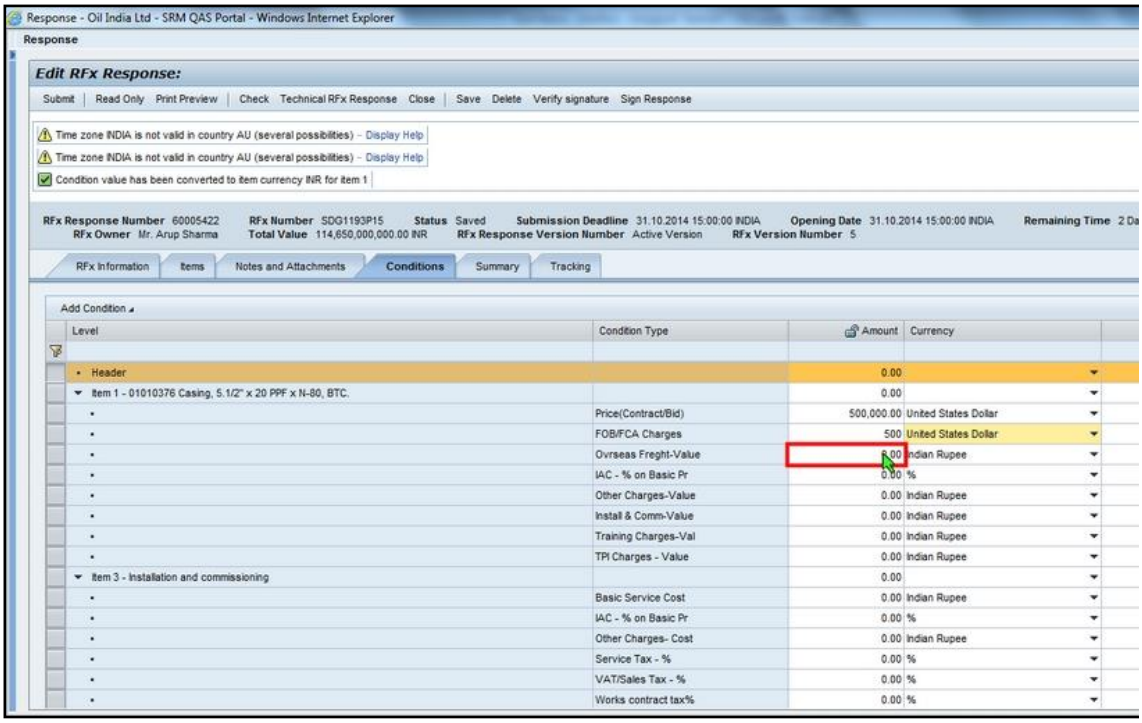
•



46. Select the desired **Currency** from the list. In this case, select "**United States Dollar**"

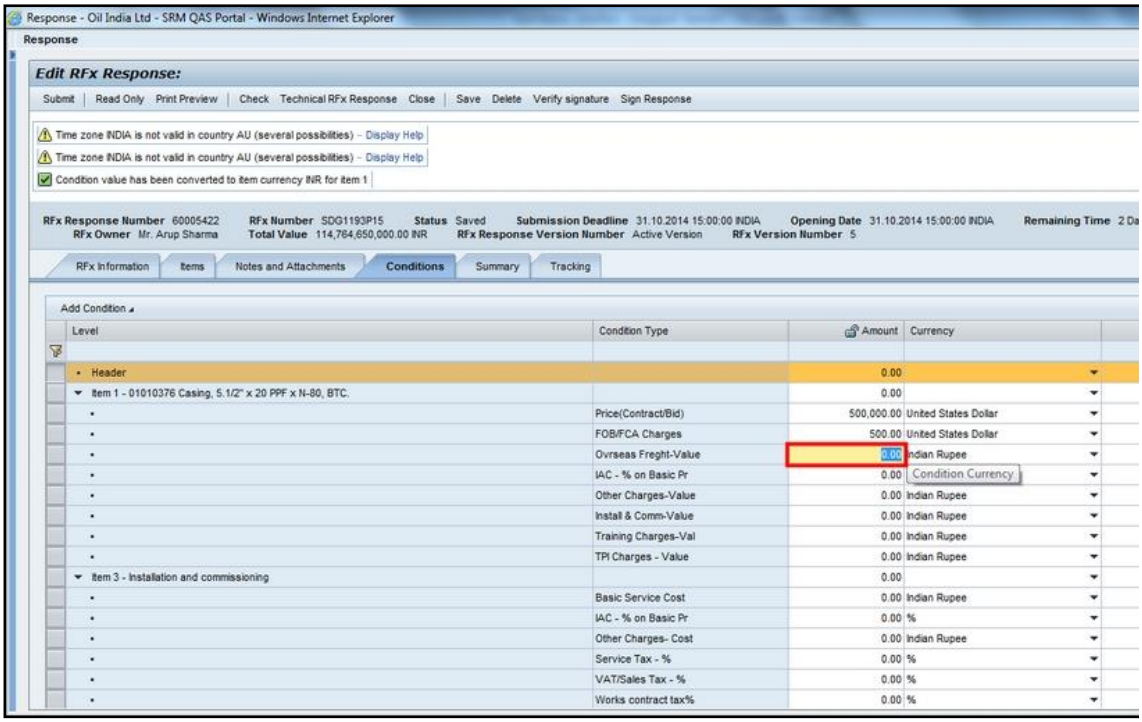


47. Click in the **Amount** field.



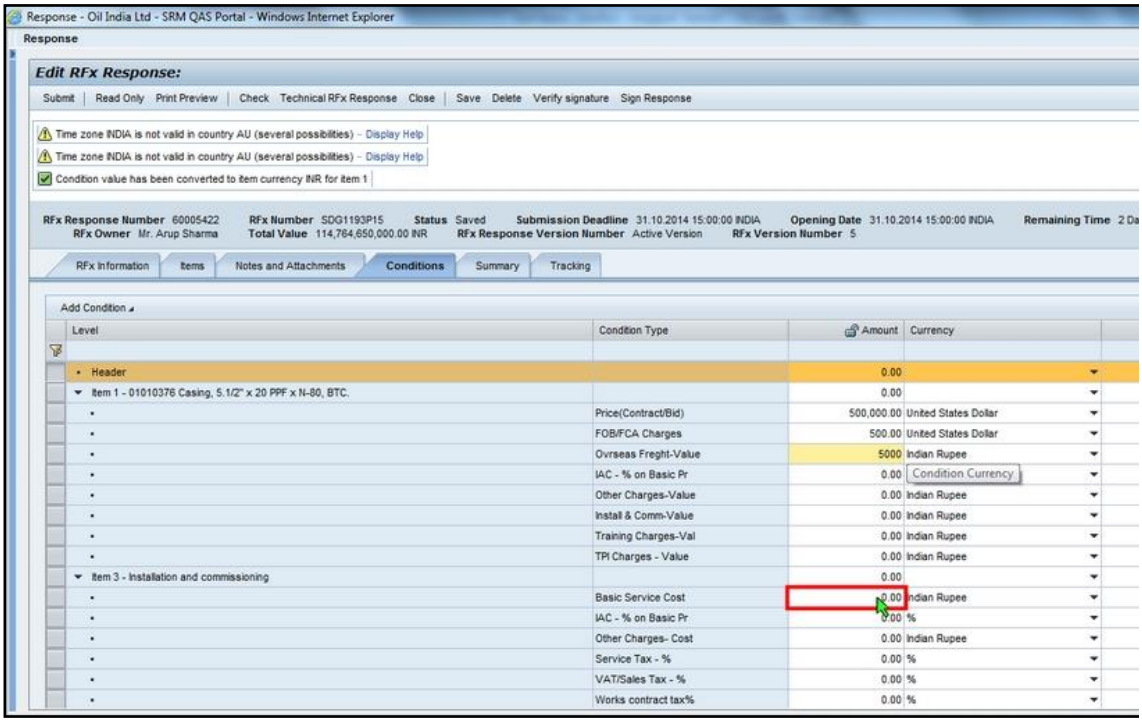
48 In the **Amount** field, enter the desired Amount. In this case, enter "**5000**".

•



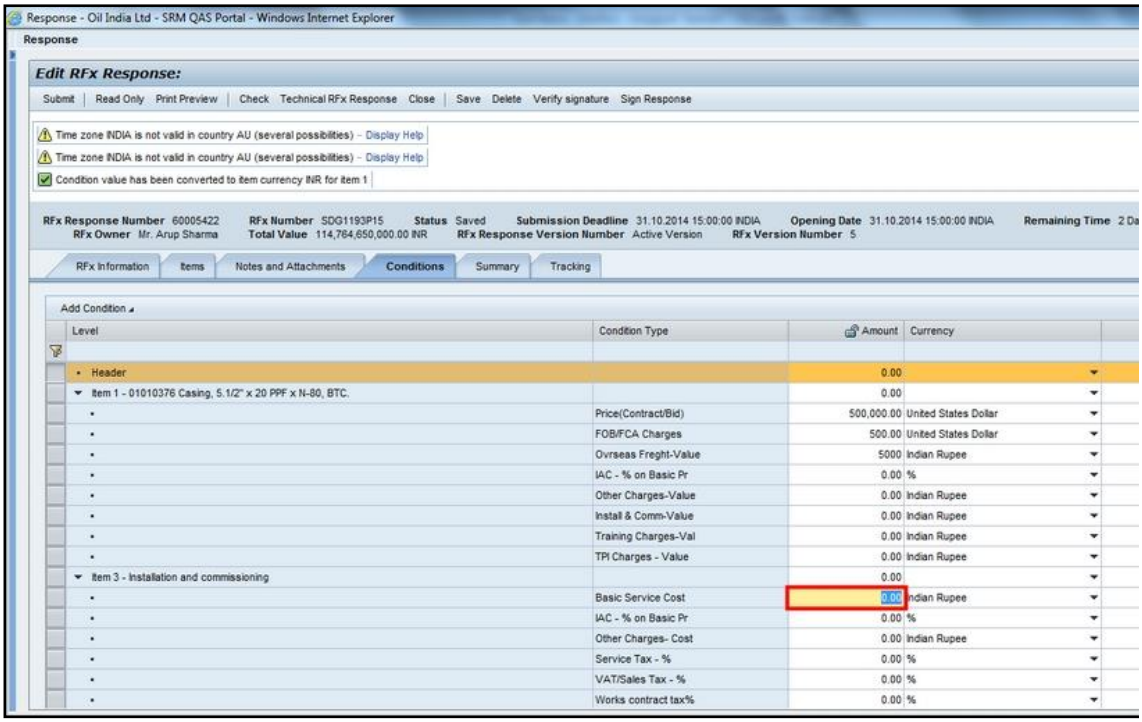
49 Click in the **Amount** field.

•



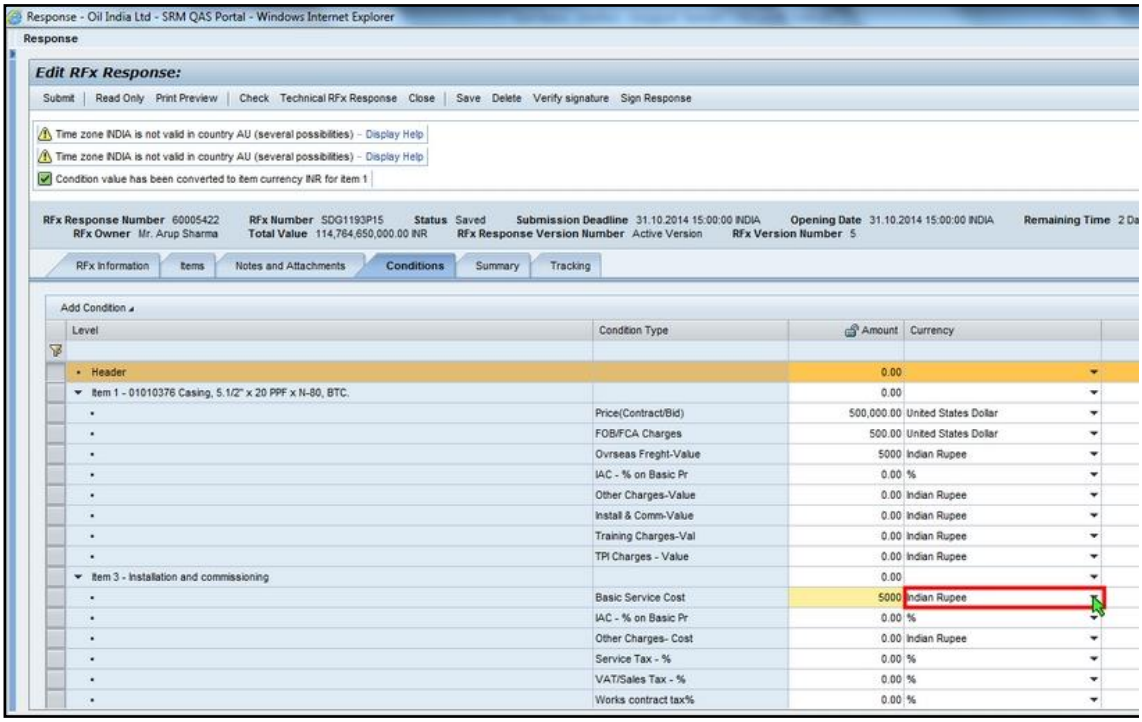
50 In the **Amount** field, enter the desired Amount. In this case, enter "**5000**".

.

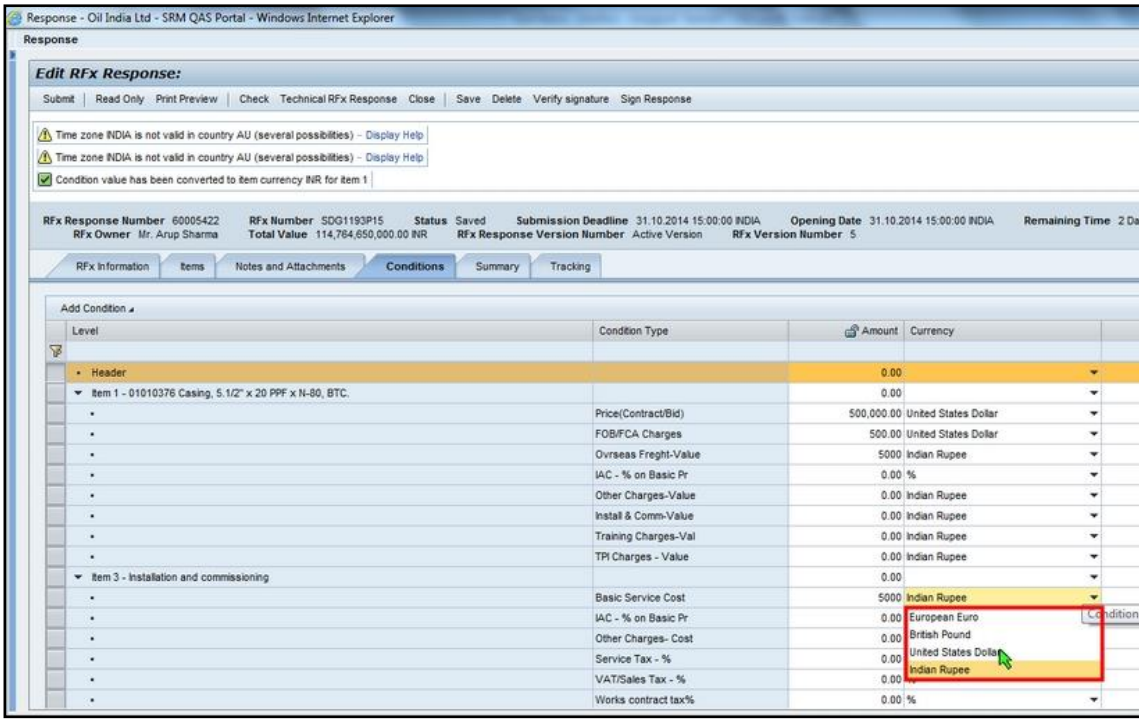


51 Click to drop down the **Currency** list.

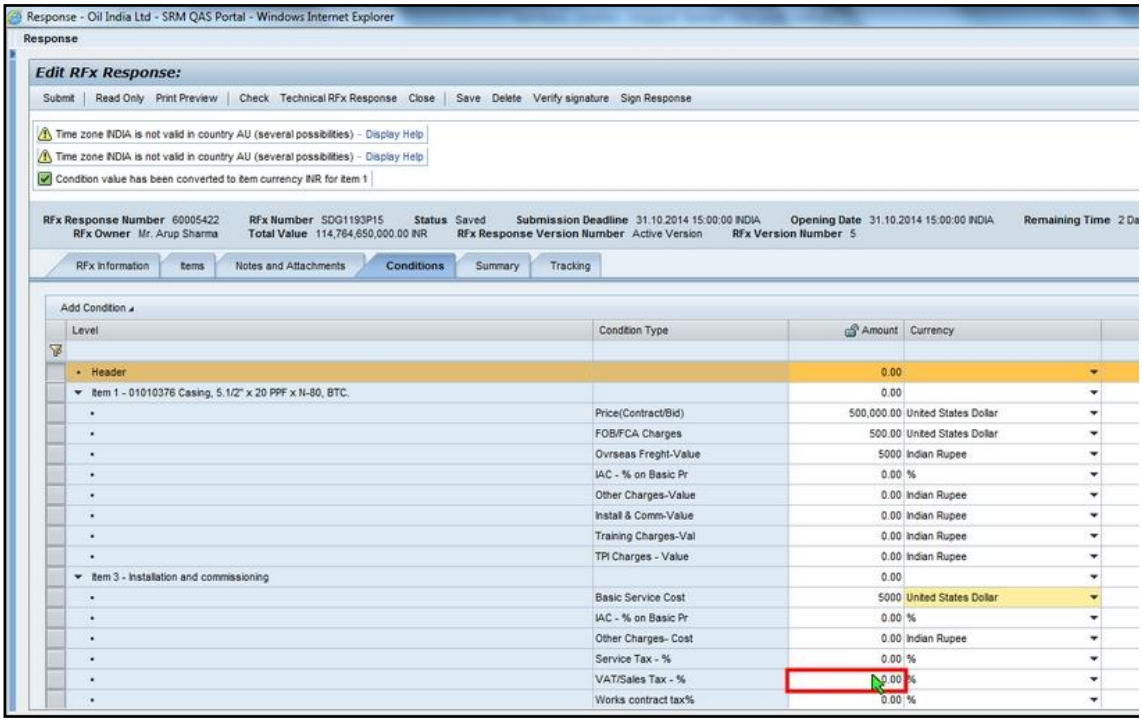
.



52. Select the desired **Currency** from the list. In this case, select "**United States Dollar**".

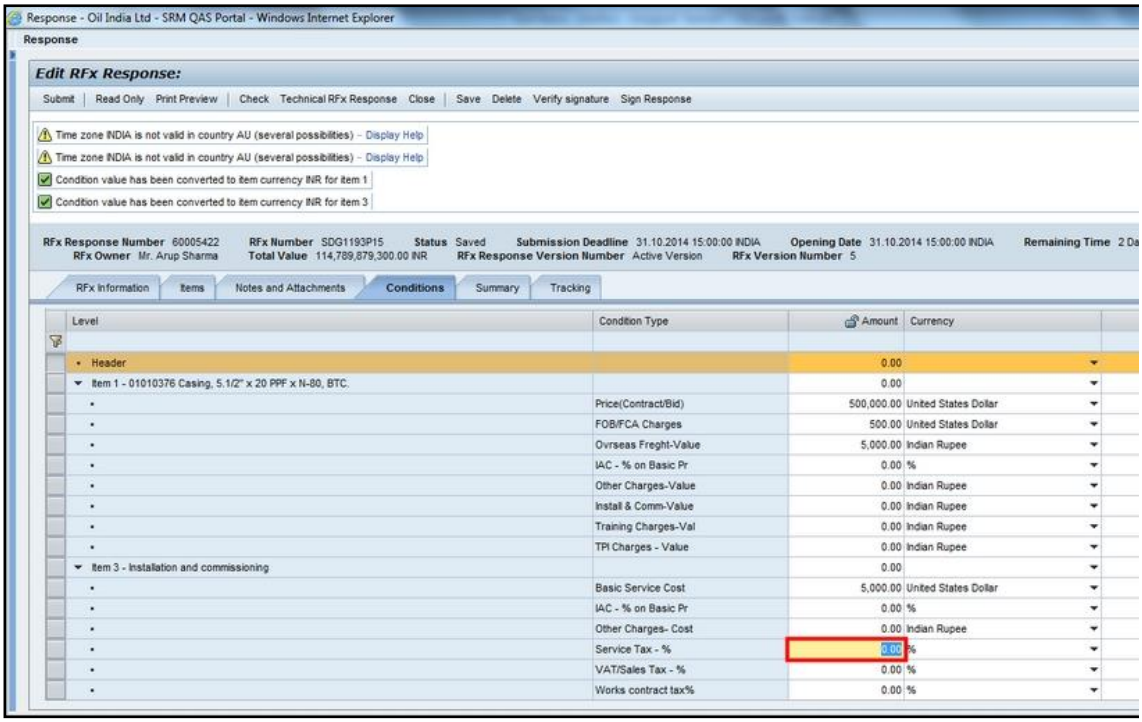


53. Click in the **Amount** field.

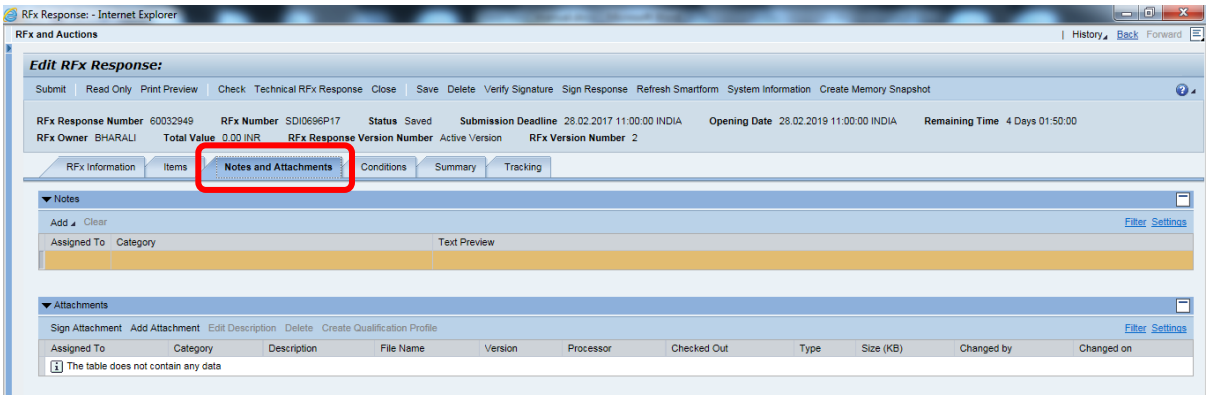


54 In the **Amount** field, enter the desired Amount. In this case, enter "**12.36**".

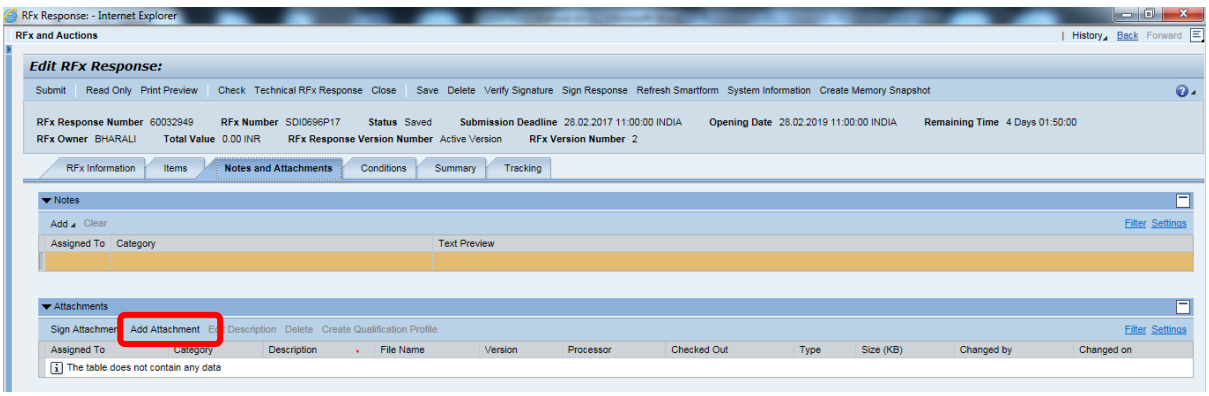
.



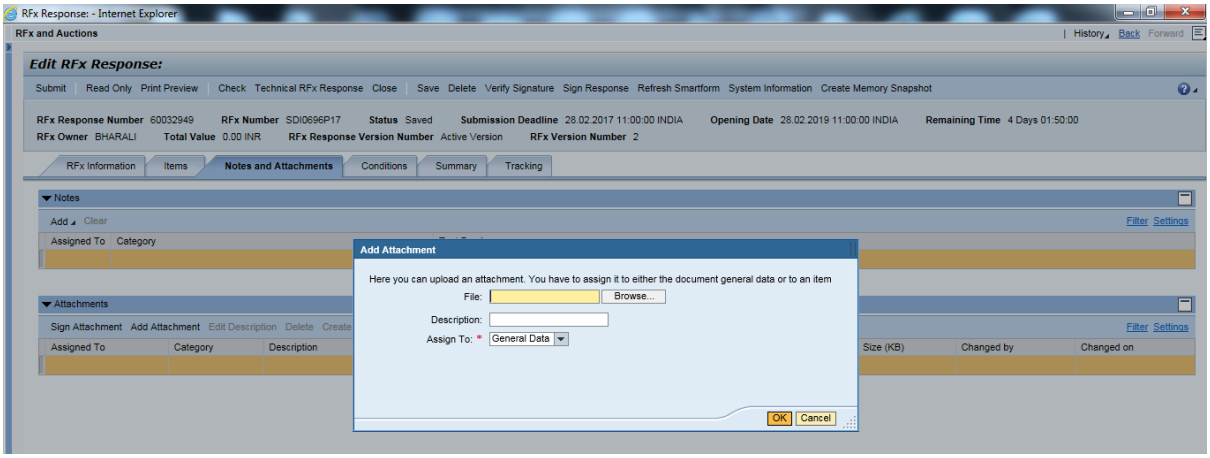
55. If the "Details Price Information" of the Tender is "No Price" then Price to be filled up under Header "**Notes & Attachment**"



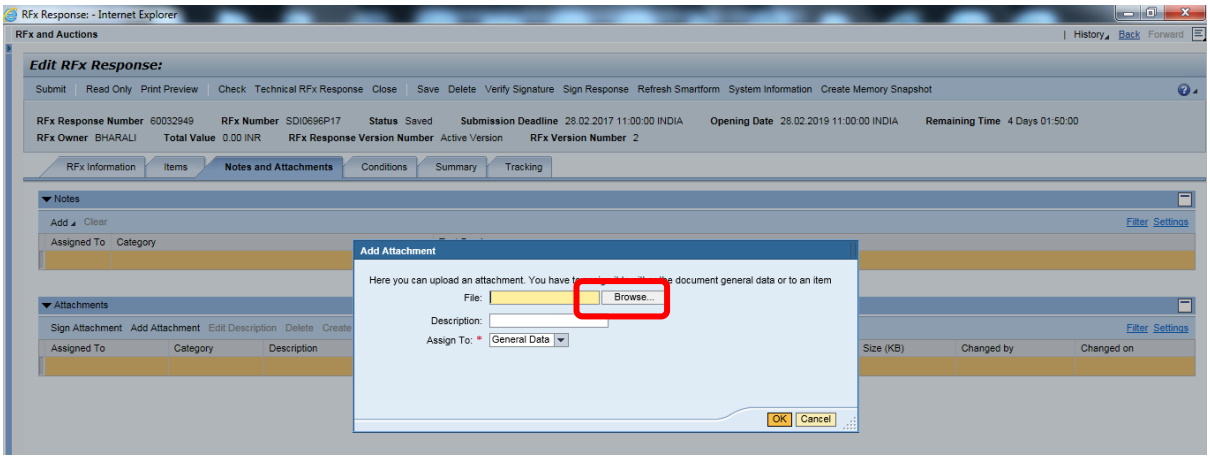
56. Click "**Add Attachment**"



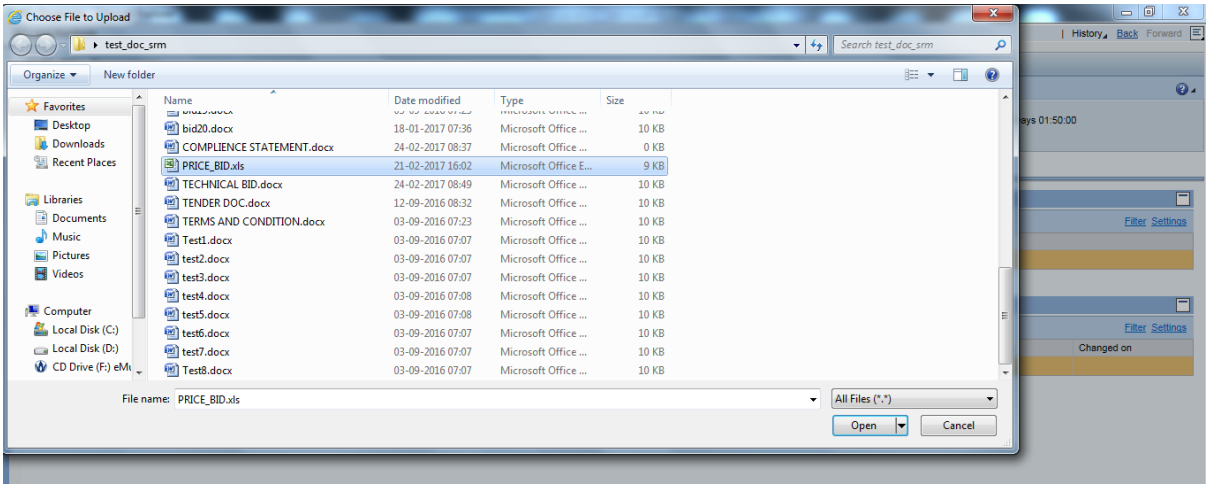
57. Screen after click **Add Attachment**



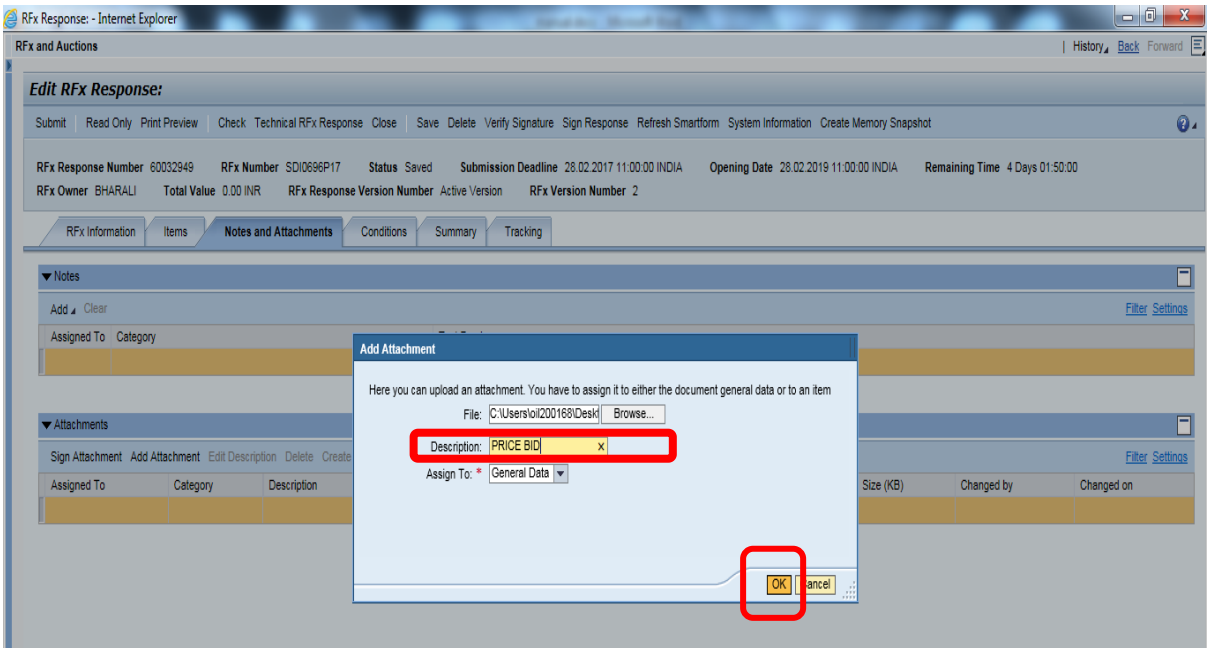
58. Click **Browse** and select the **Price Bid file** from the Computer



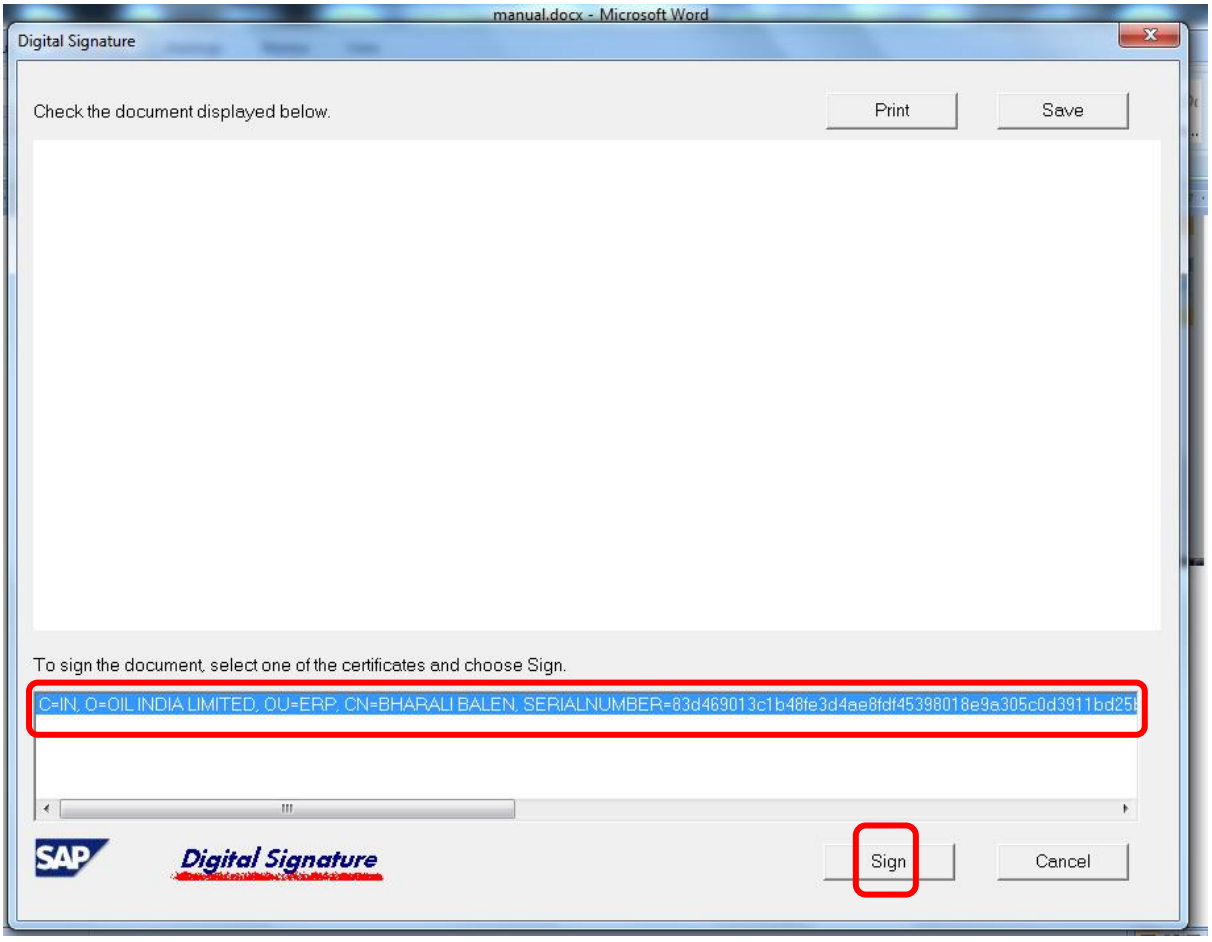
59. Select the file and double click on the same



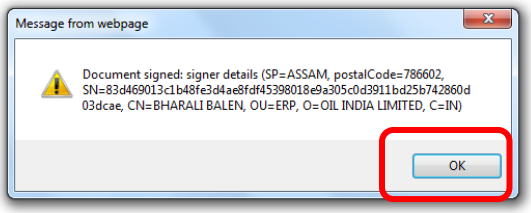
60. Fill up the Description and click "OK"



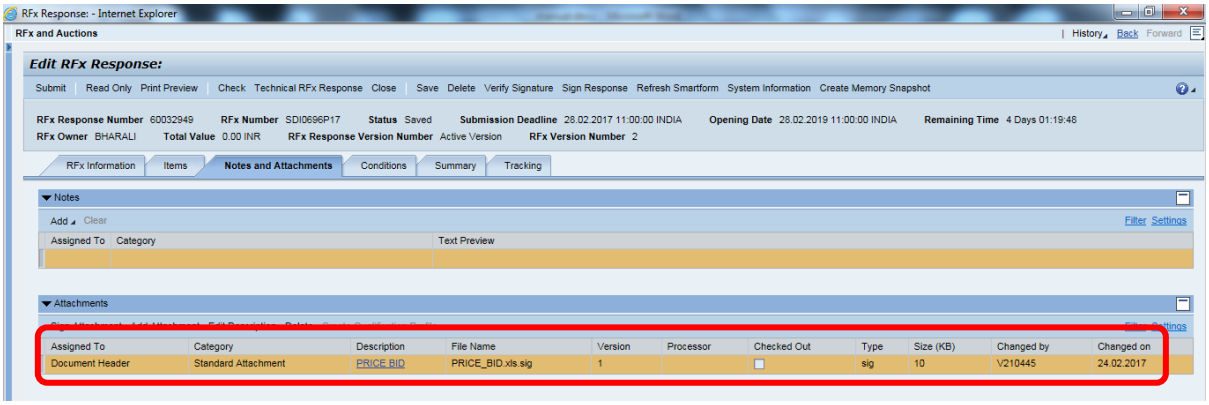
61. Select the Digital Signature and click **Sign**



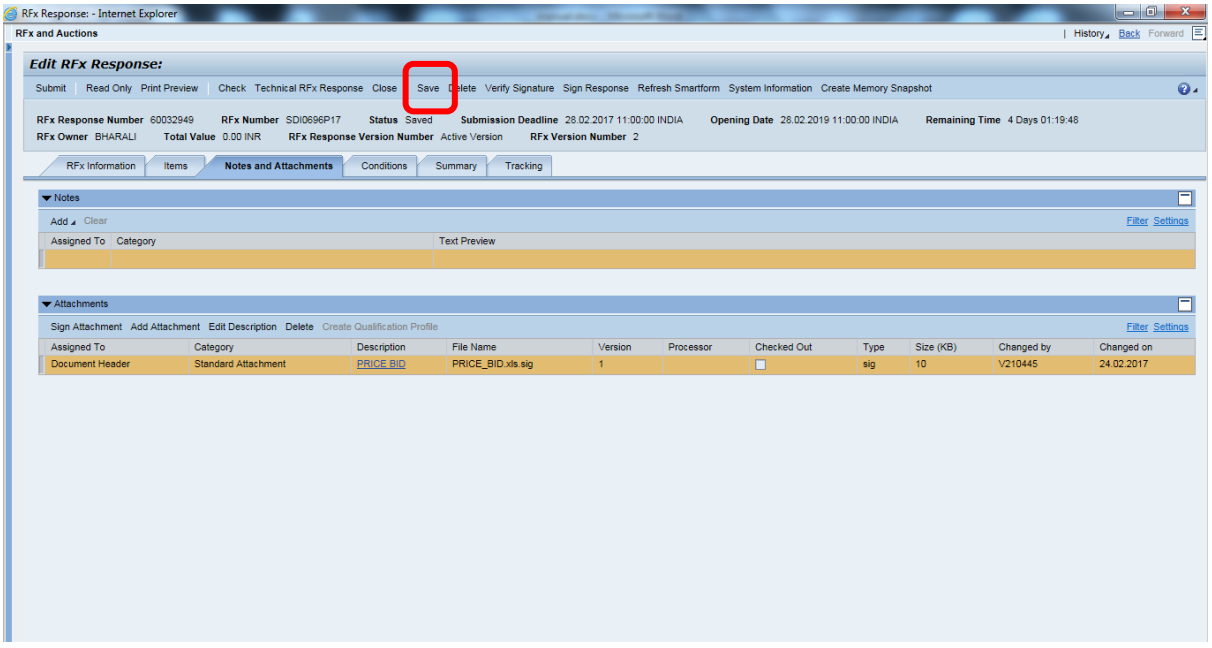
62. Documents Signed and click **OK**



63. In this way Price Bid is Uploaded Successfully.

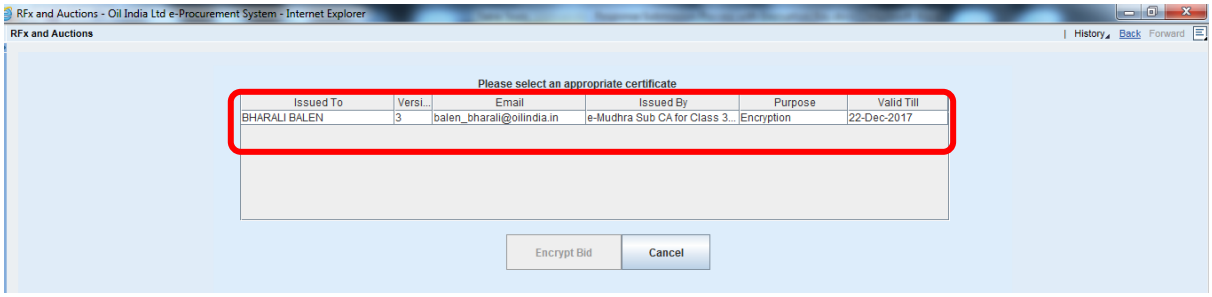


64. Click on **Save**.

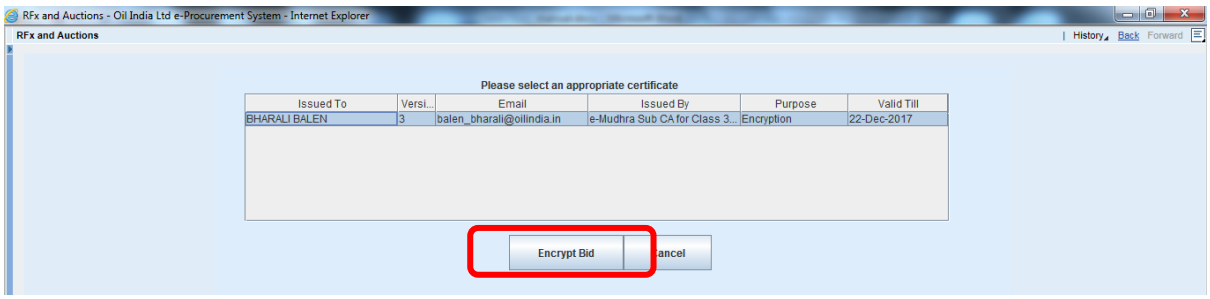


Once saved, the data will be encrypted and the encryption certification will be in use.

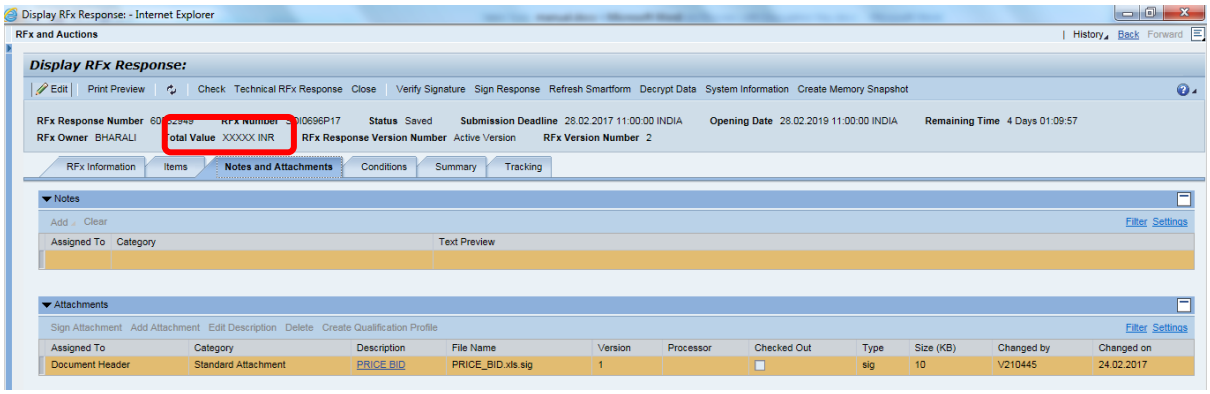
65. Click to select the desired Encryption Certificate



66. Click on the **Encrypt Bid** button.

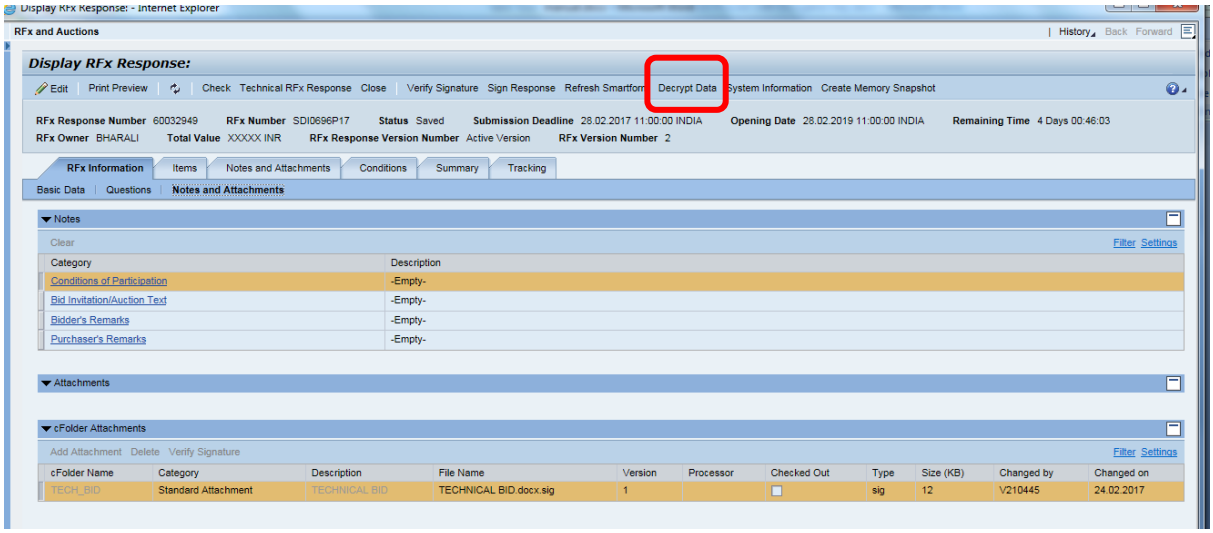


67. Once encrypted, all the pricing data will be either .01 or XX. On Decryption, the data will be displayed again.

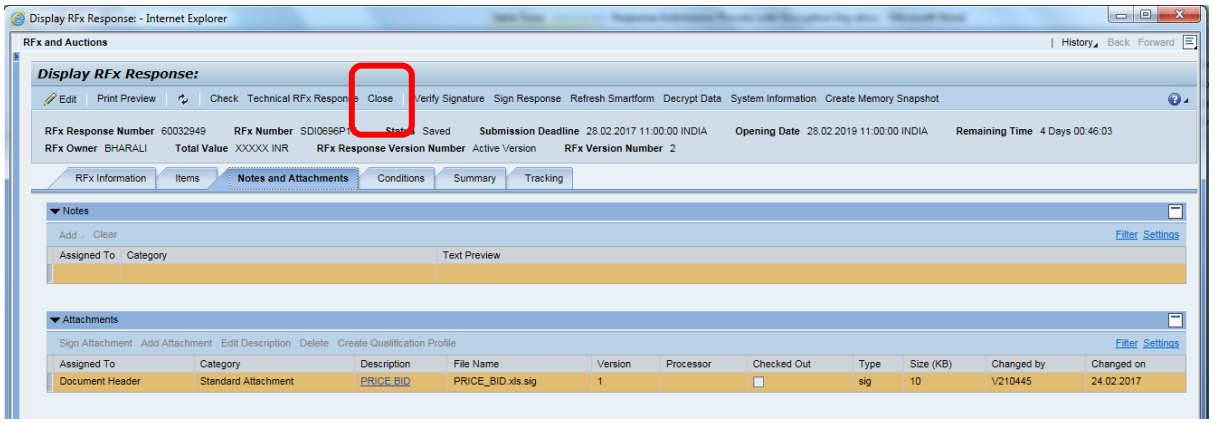


As Data gets encrypted, all the pricing data becomes either 0 or XX. On Decryption, these data will be displayed again.

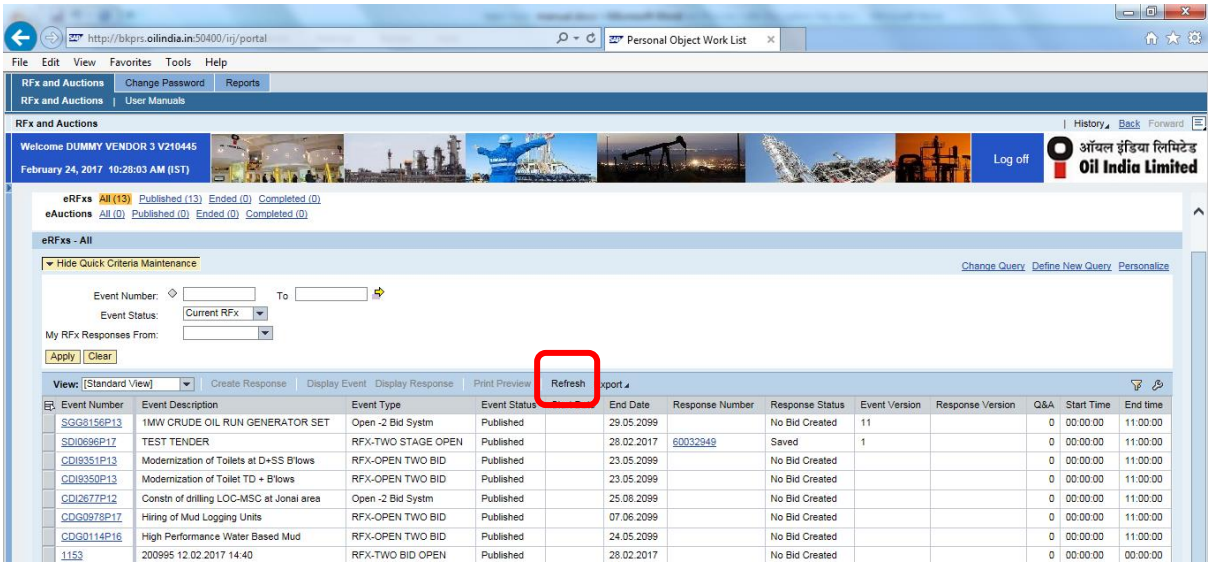
68. The encrypted Data will be displayed only when click "**Decrypt data**"



69. Click on "**Close**"



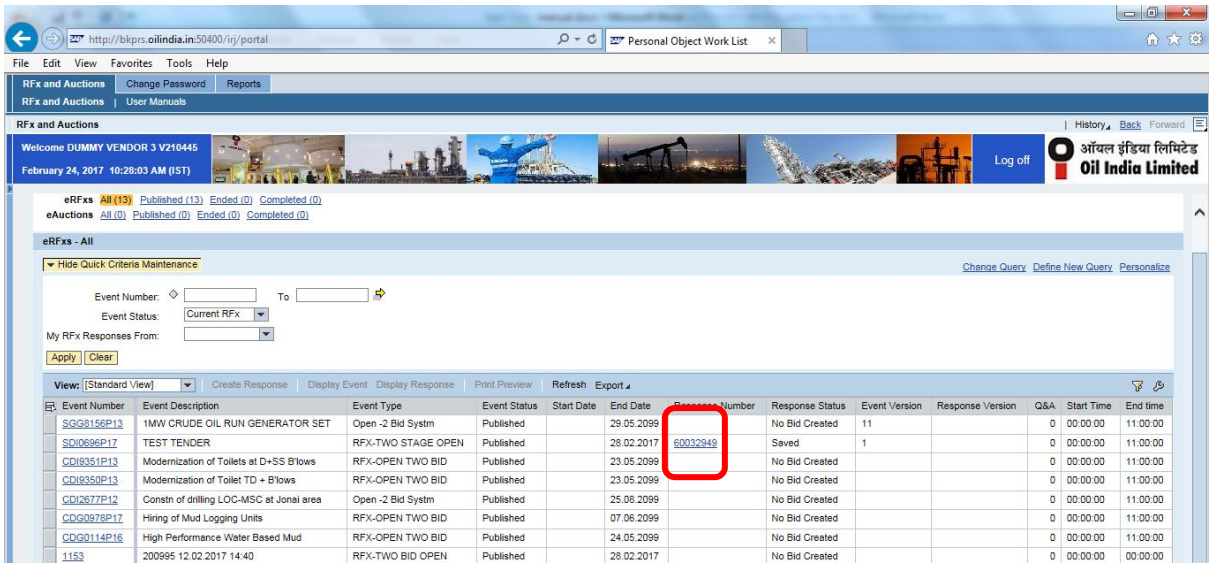
70. Click on **Refresh**



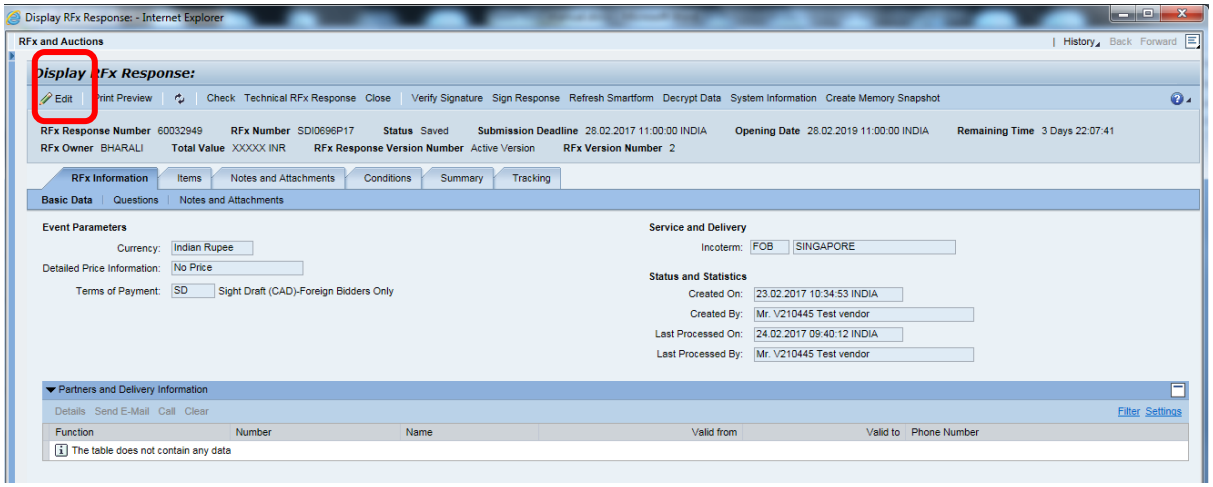
Now uploading part is complete. We have to come to the initial screen. It is always better to come to the first screen and refresh the page and then going in into the response for the submission process.

CHECK AND SUBMIT RESPONSE

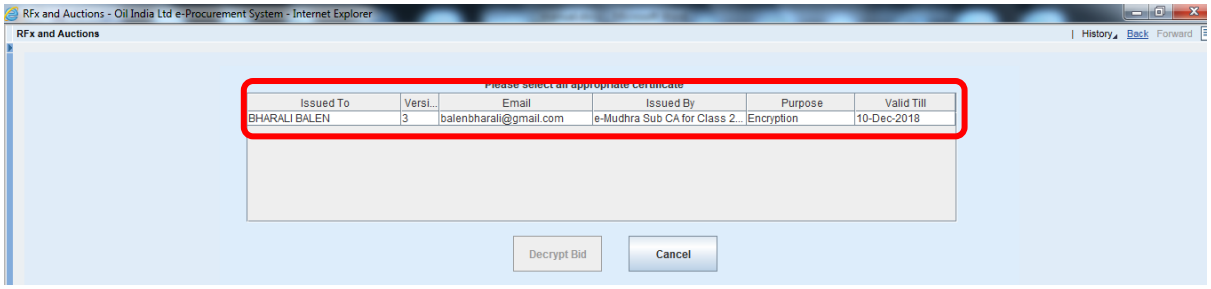
71. Click on the **"Response No"**



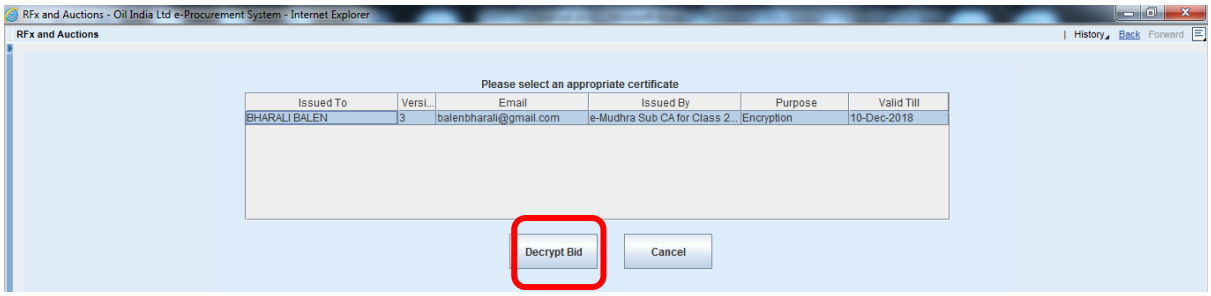
72. Click on **Edit**



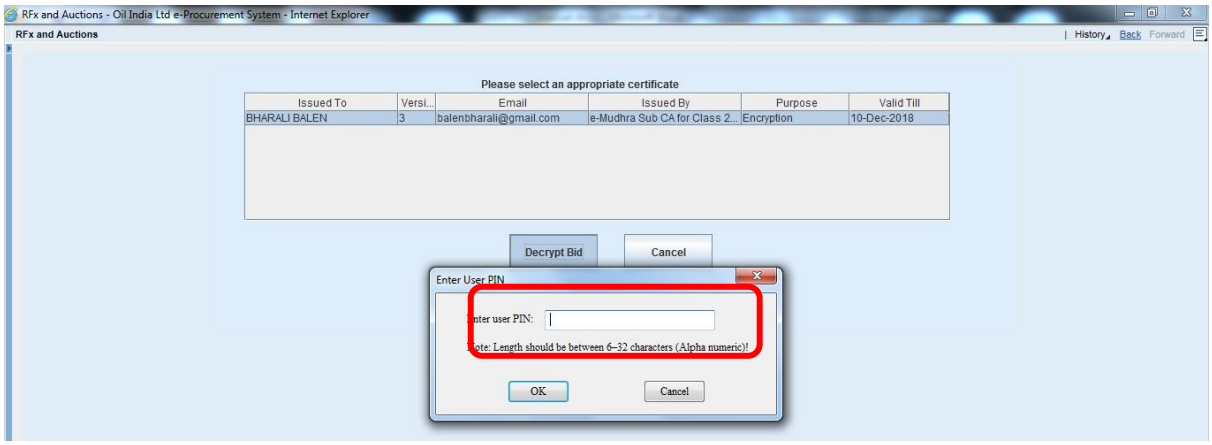
73. Click to select the same encryption certificate used for De-cryption else data will not decrypt.



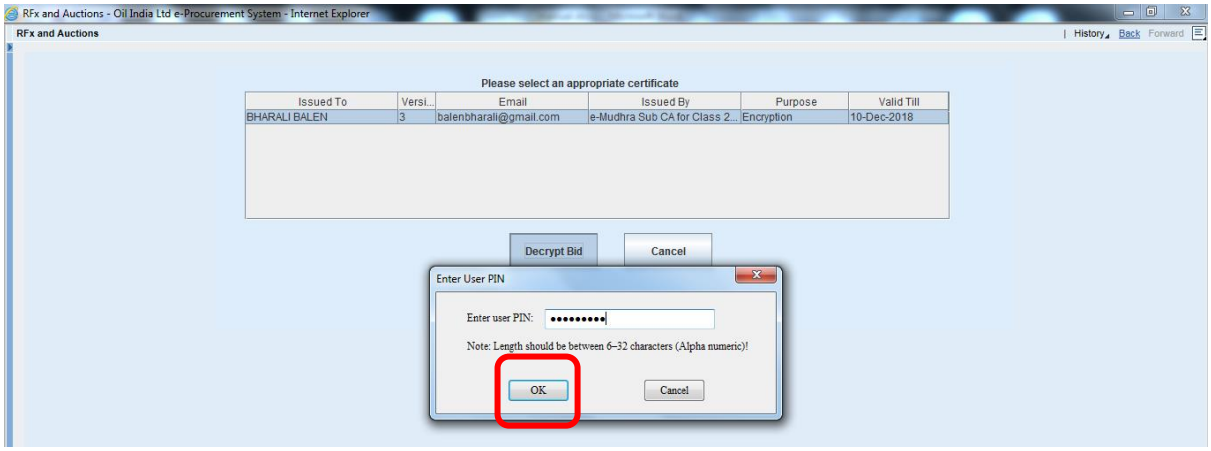
74. Click on the **Decrypt Bid** button



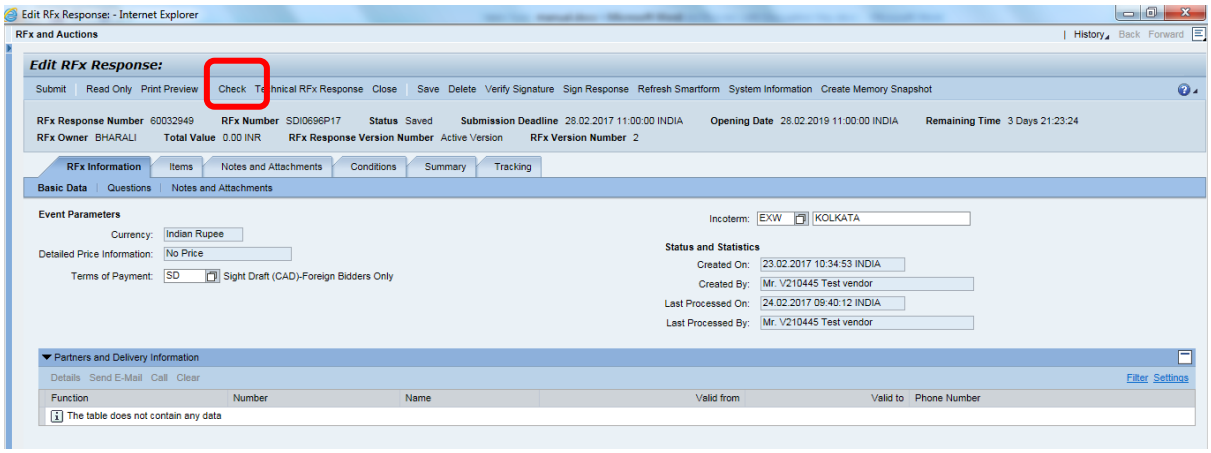
75. Enter **PIN**



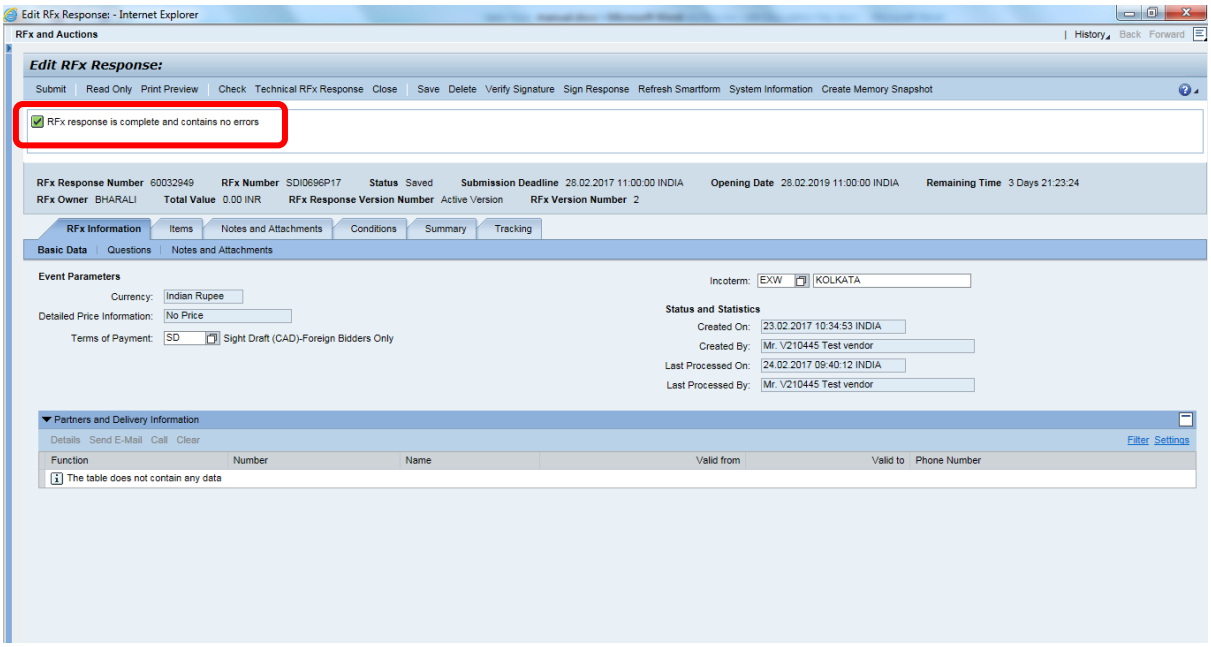
76. Press **OK**



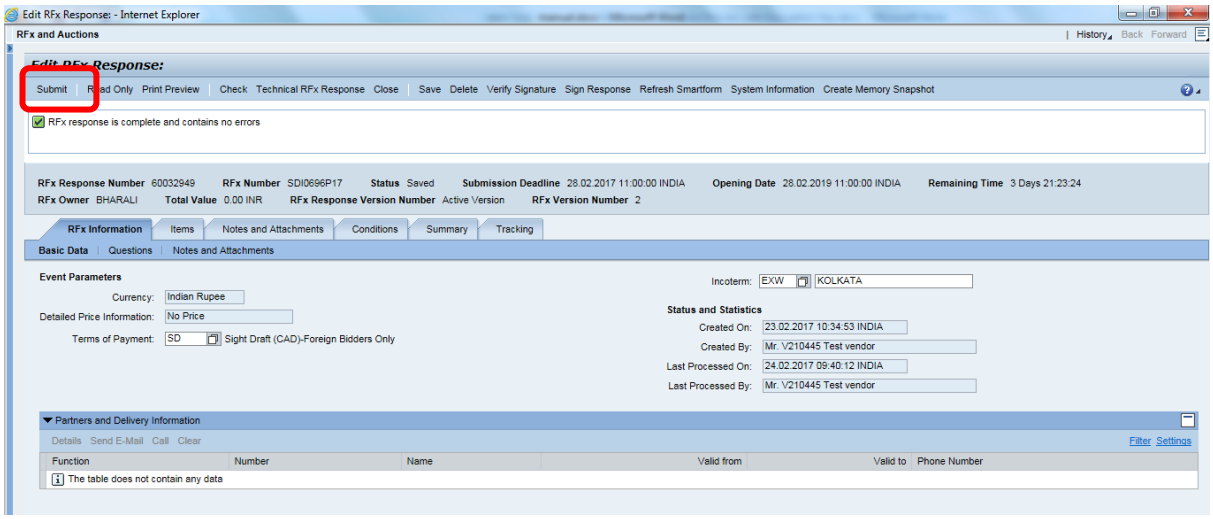
77. Click on **"Check "**



78. Bidder may submit the response, in case there is no error.



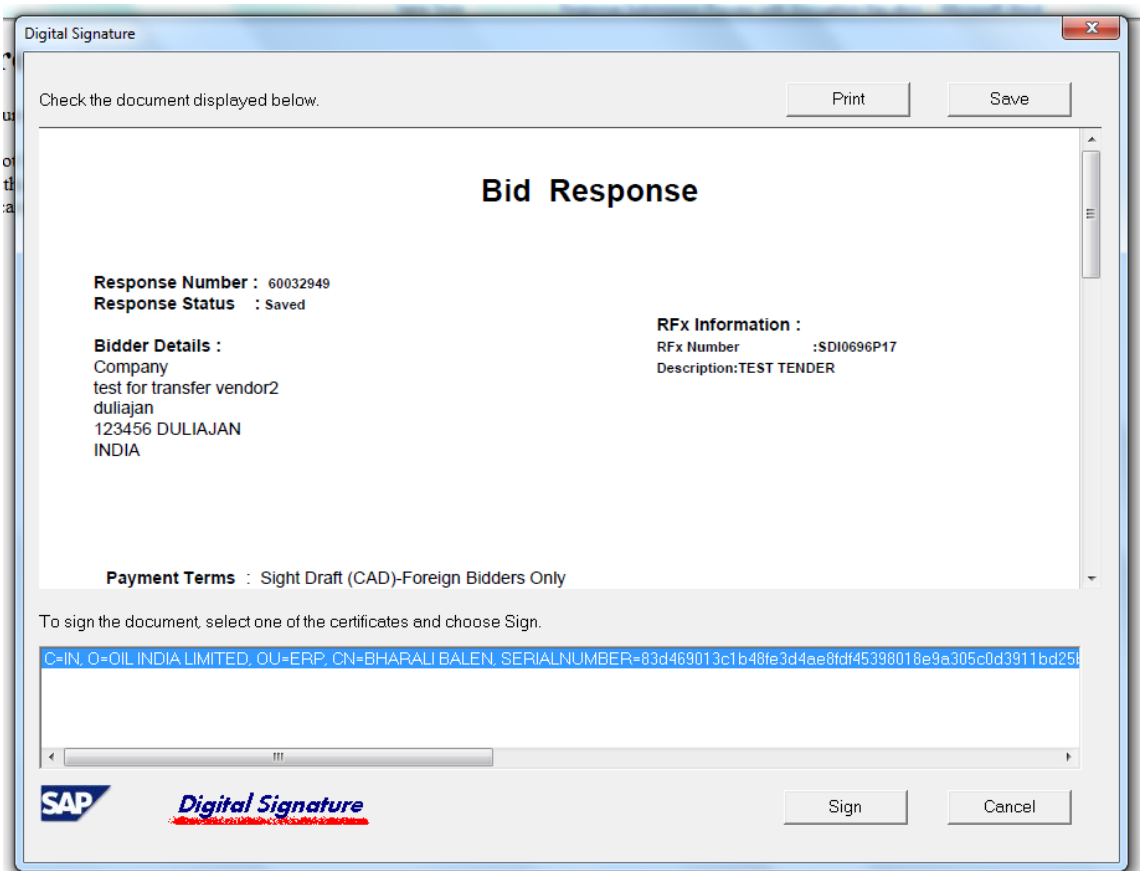
79. Click on the "**Submit"** button



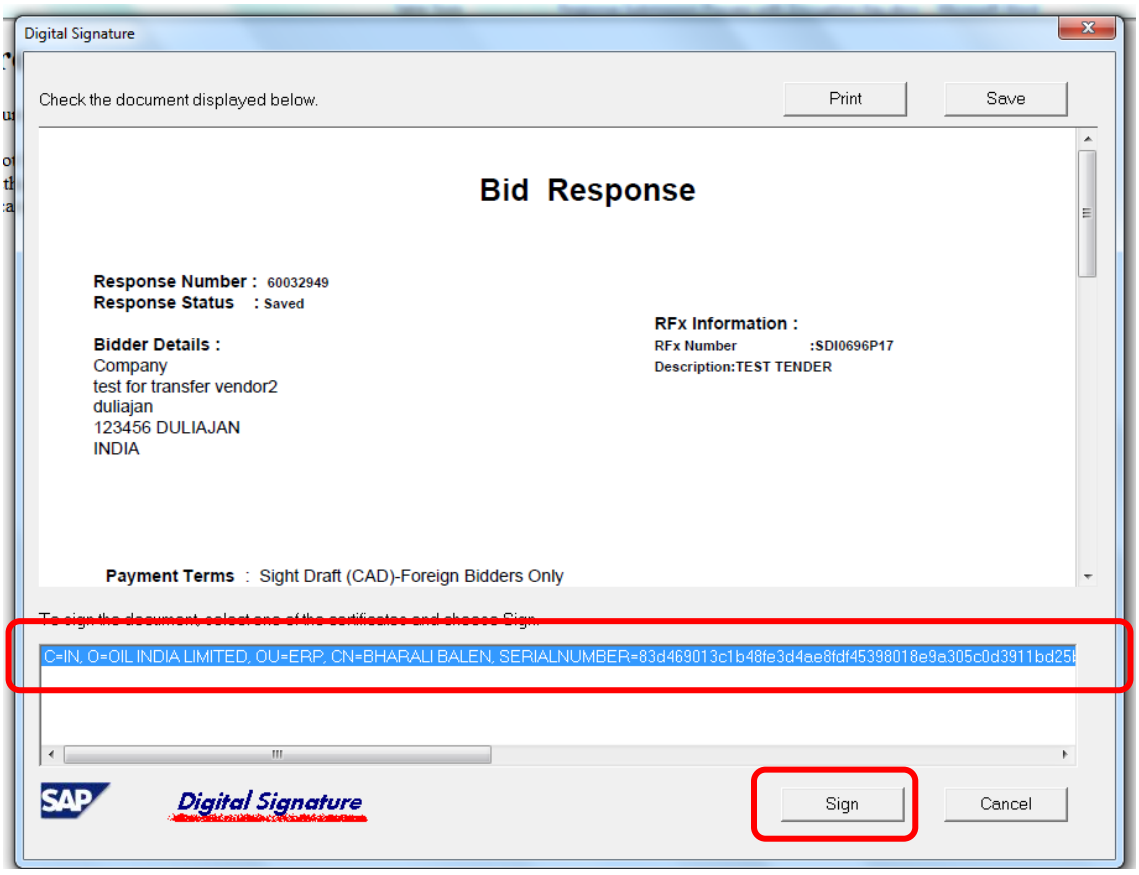
Before submit, please do check all the documents uploaded & on-line data maintained are correct.

80. Screen After click submit:

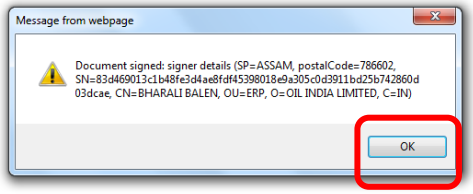
Bidder may see the total Response summery before submission:



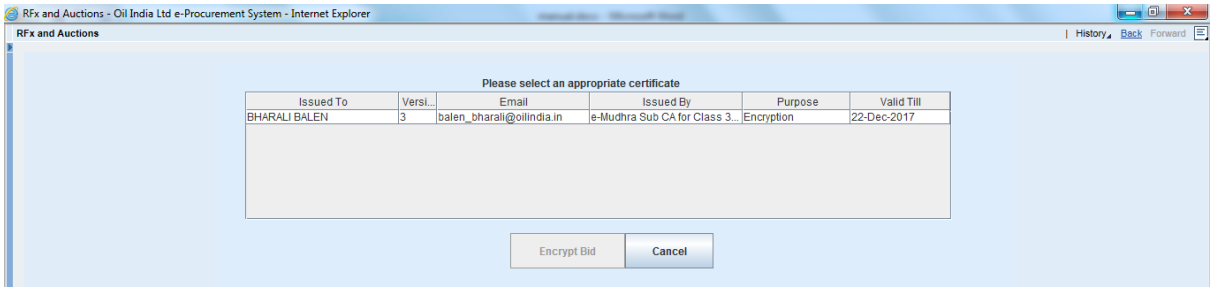
81. Select the Digital Signature and click **"Sign"**



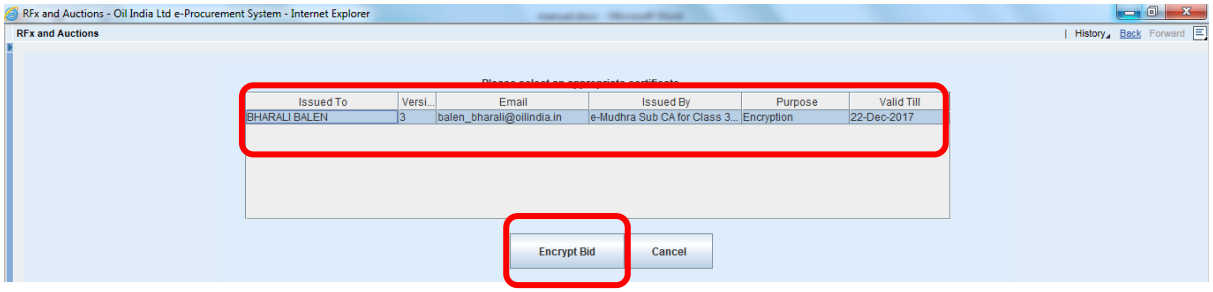
82. Documents Signed and Click **OK**



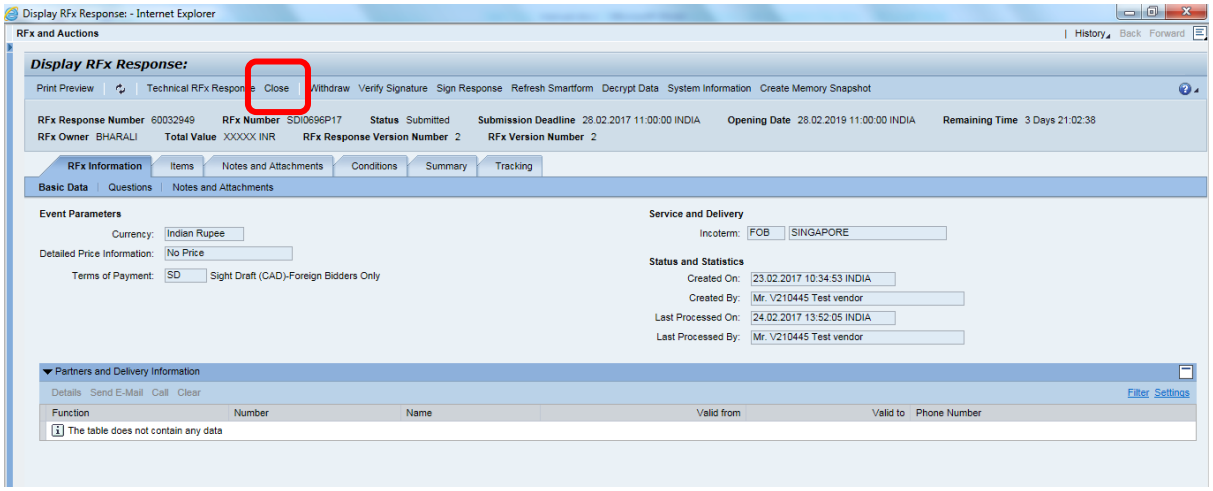
83. After signing, the response has to be **Encrypted** again.



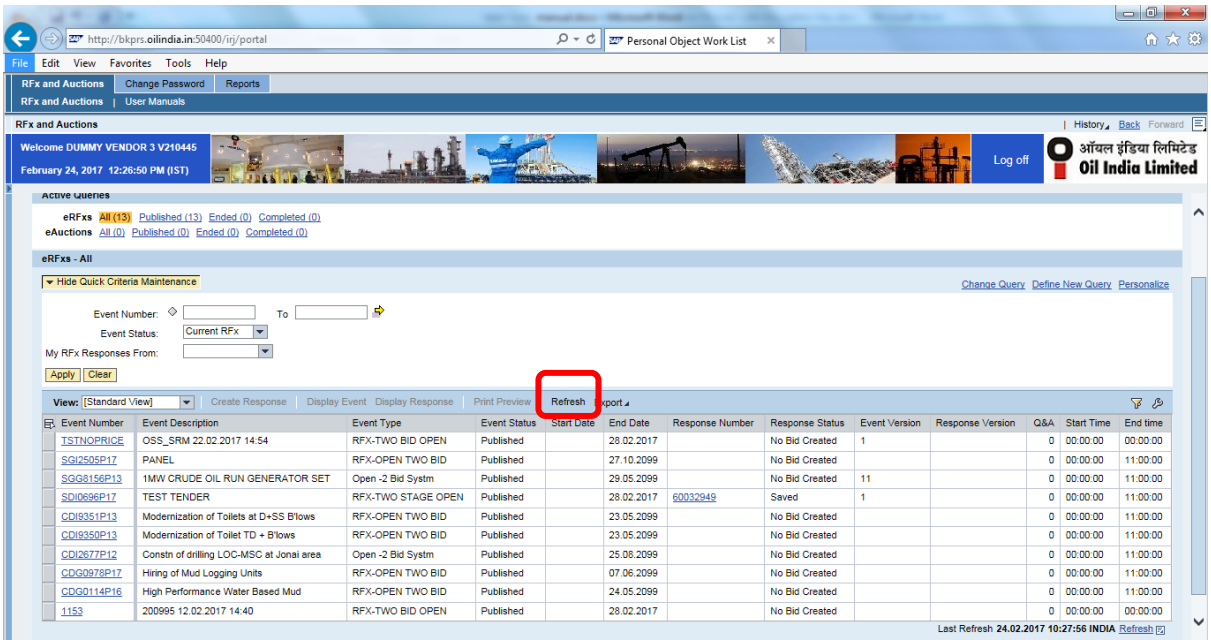
84. Select the Encryption Certificate and Press Encrypt Bid



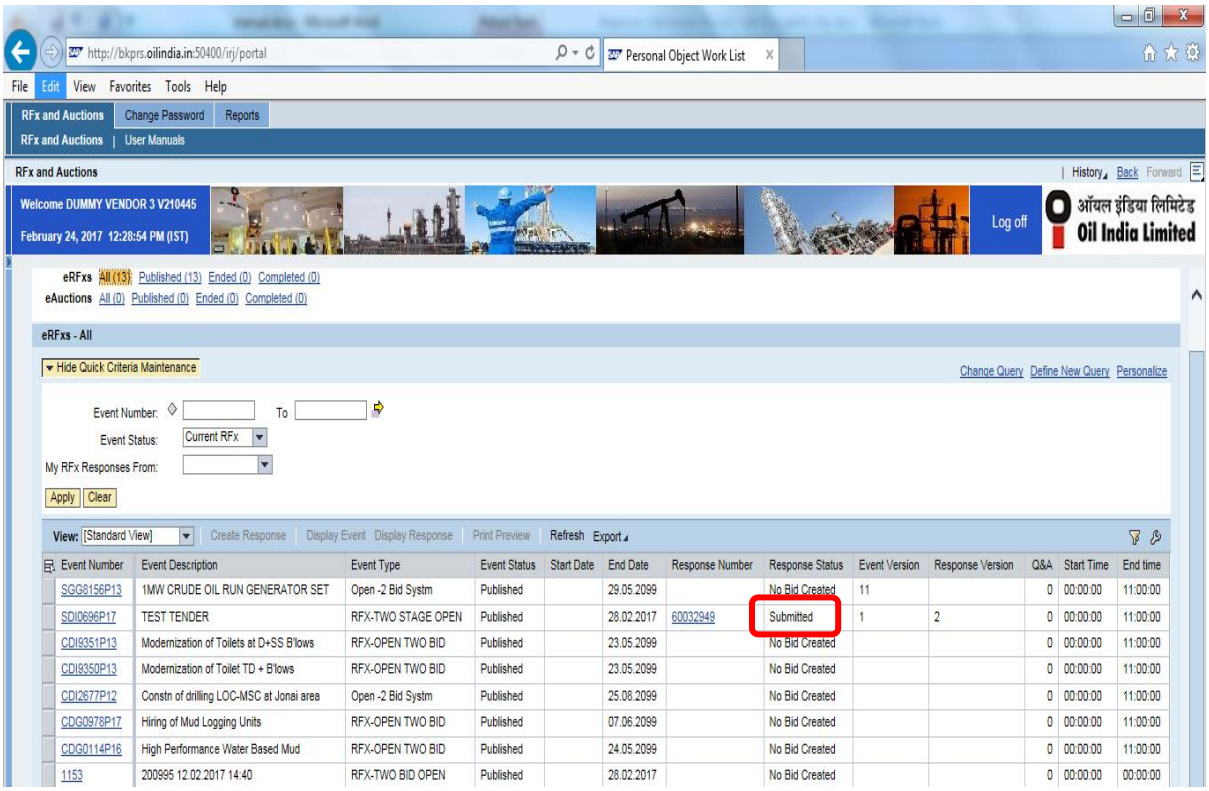
85. Click **Close** button



86. Click on **Refresh**.



87. The Status of the Response must be submitted



This is the end of **Response Submission with Encryption Key** process.

DISCLAIMER

It may be noted that this is an effort to help bidders with E-Tendering Guide for downloading/uploading of bids during e-bidding process. OIL does not stand responsible on failure to upload the e-bids successfully based on these Instructions

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