Axnosis

Demo script – Bid Evaluation Committee Mobile App

Microsoft Dynamics 365 FO

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Draft

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Foreword

Procurement is the **process of buying goods or services**. Procurement is often carried out by the process of tendering (inviting many suppliers to respond to a formal request for goods or services), **rather** than buying products directly from a seller.
It includes invitations to possible suppliers, then through a process of qualification, assessment and evaluation, getting to a preferred supplier.

Properly done, tender management will start with a "**procurement trigger**" (Purchase request or procurement plan) and include components
of **meeting** management, **committee** appointments, **declarations of interest** and **specification** management.

Tender management is also used by **project management** organizations to analyze data of proposed & current projects. Project portfolio managers provide forecasting & business analysis when looking to invest in new projects. It starts with obtaining approval and extends into the procurement cycle. By seeing the big picture of how a proposed project will fit into the goals and objectives of the organization, companies can make **better decisions** on what projects to choose and what initiatives will create the most return.

The **objective** is a formal, cost effective process, removing subjectivity and increasing governance & transparency.

It involves **filtering** through (like a **funnel** which starts off with many and end with few) all suppliers that responded to the invitation through steps of **Qualification** of supplier as an organization; doing **technical analysis** on the content of the supplier response,
final **evaluation** looking at pricing and possible costs, ending in a **recommended shortlist**.

Finally, Tender management concludes with **contracts**. Contracting officers should have a **common thread** through the tenders – back to the initial **procurement trigger.**

They should also set up and maintain complete and up to date records on every aspect of the contract, both to provide a list of actions taken, and to protect the organization's interests under the contract. This will give an **organizational memory** of activities and events.

Related Documentation

DOCUMENT NAME	DATE	REVISION	AUTHOR
TENDER MANAGEMENT WIKI PAGE	2025/03/11	DRAFT	RIAAN VAN DER BERG

Table 1: Related Documentation

Change and Version History

DATE	VERSION	AUTHOR	CHANGES REQUESTED BY
2025/03/11	1.0	KAYLEN VAN DER BERG	RIAAN VAN DER BERG

Table 2: Change and Version History

Table of Contents

1. Technology

- Microsoft Dynamics 365 (D365 for Finance and Operations)
  - o HSE & GRC modules
- Axnosis middleware
- Ionic/Angular standalone applications
  - o Safety permit mobile app
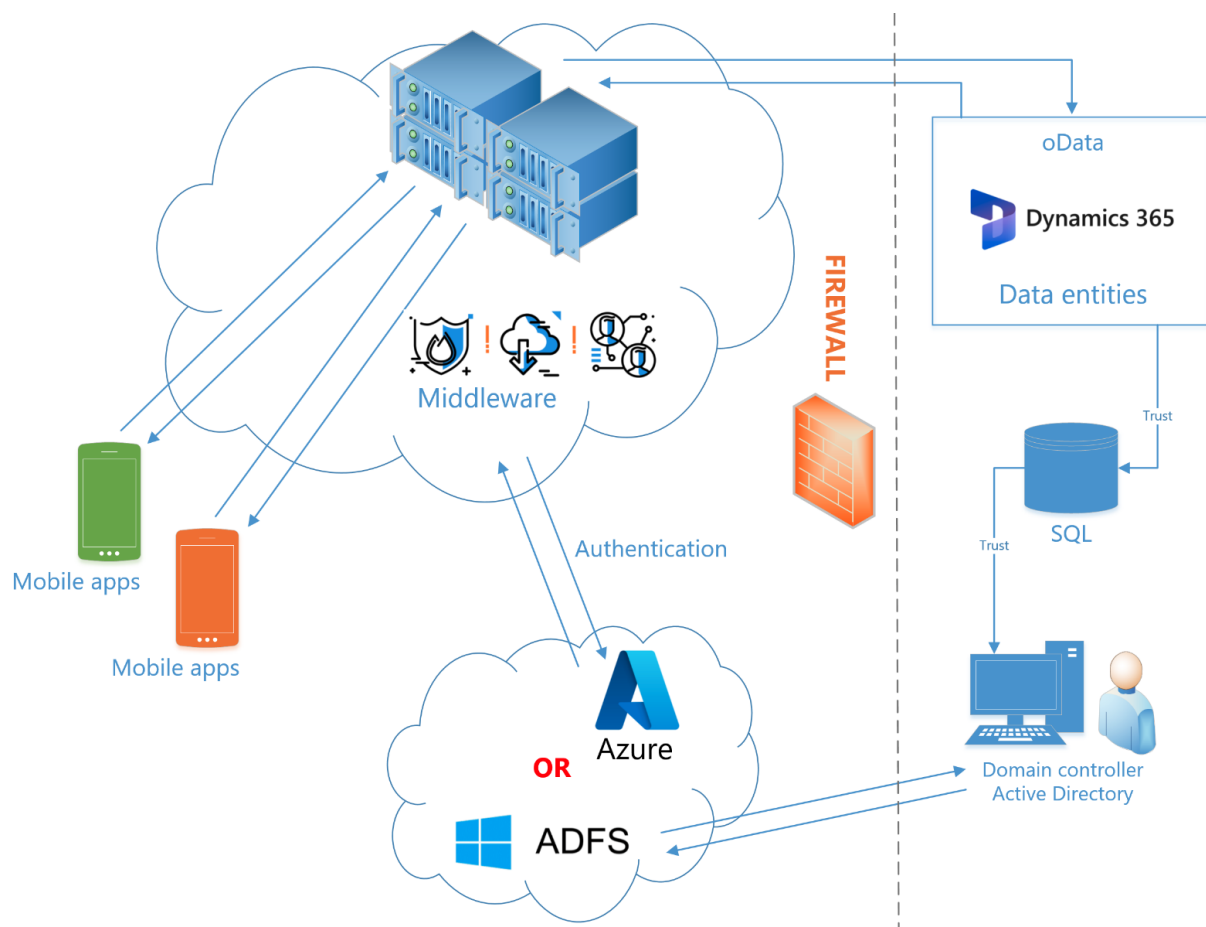
2. Demo setup

- This script is written for use with D365 for Finance and Operations and Axnosis Permits to work mobile app.
- The apps support both platforms

- The apps can be downloaded from:
    - Android: Google Play store
    - iOS: AppStore or TestFlight

- The user must be registered in AAD and should be a registered user in D365 for Finance and Operations:
    - Environment: Same D365 environment as used for transacting
    - Company: Defaults to the user setup in D365

- The users should be able to successfully login to the app by using the same login details as used for D365 for Finance and Operations. The relevant security role restrictions and legal entity allocations on D365 for Finance and Operations should be considered and applied on the mobile app sessions. The same user security roles will permit/exclude the user's right to capture events on the app.

- Whenever a new app update is required to be installed on the mobile phone, first ensure:
    - Current (old) app is uninstalled
    - Clear the mobile phone's cache (Android)
    - Remove all previous downloads of the application from the phone's download folder
    - Re-install the application and use

2.1 Background and Scenario

Separate committees are created in D365 to segregate the different roles and duties in the tender process. There are normally two explicit evaluations performed on the vendor responses to tender invitations. Technical and commercial checklists are assigned to the members of the said committees. The members of these committees are often away from their PCs and late submission of their checklist scores is not allowed.
The BEC mobile app makes it possible for these members to do scoring on checklists assigned to them from their mobile devices.

The BEC mobile app also shows the procurement bid meetings where the logged in user is the owner of the meeting, thus the user has a view of future tender meetings that he/she needs to prepare for and attend. Another great feature is that the mobile app allows the committee members to do a declaration of interest without opening their PC.
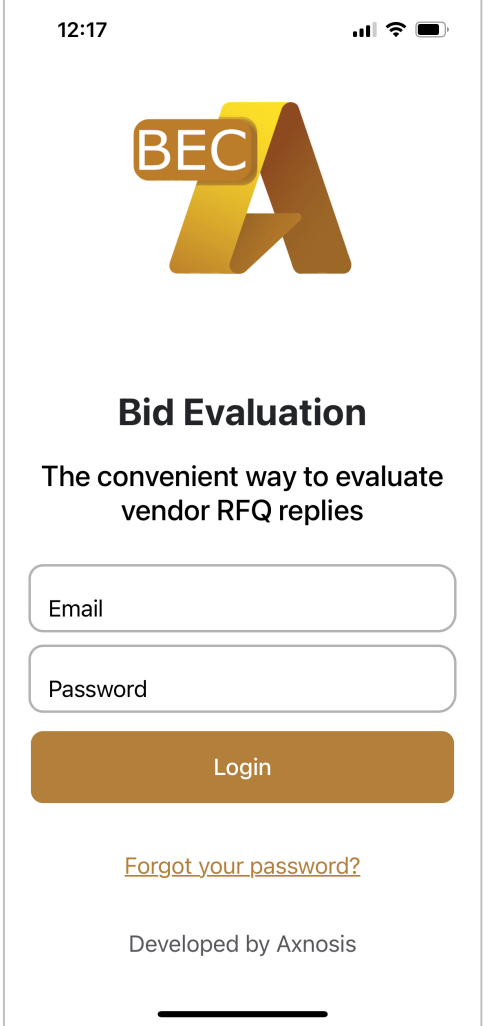
All of the above provides a compelling reason to do certain bid functions on a mobile app.
- It is assumed that the D365 GRC module is installed on D365
- Procurement plans and RFQs are created in D365
- Technical and Commercial checklists are created in D365

3. Demo script

3.1 Log into the BEC app

TALKING POINTS AND STEPS	MOBILE APP
The user takes out his/her mobile phone and taps on the **BEC** icon.	

TALKING POINTS AND STEPS	MOBILE APP
The logo on the **login** screen appears … The user's D365 login details (**Username** and **Password**) are entered and used by the app for validation. The user then taps on the **Login** button to log into the app session.	12:17 **BEC** **Bid Evaluation** The convenient way to evaluate vendor RFQ replies Email Password Login Forgot your password? Developed by Axnosis

If multi-factor authentication has been enabled for the organization, Microsoft sign in may require in addition to the application sign in. During the initial sign in, the Microsoft sign in may have to be completed twice.

The Microsoft sign in will not be required during every sign in to the mobile application. Sign in to Microsoft will be required during initial sign in; after sign in expiry and after a user has opted to manually sign out of the Laboratory application.

Enter the **Microsoft email account** and click on the **Next** button to continue.

Microsoft

Sign in

julene.vaneeden@axnosis.com

Can't access your account?

Next

Sign-in options

Terms of use   Privacy & cookies   · · ·

Enter the **password** for the Microsoft account entered.

Click on the **Sign in** button to continue.

Microsoft

← julene.vaneeden@axnosis.com

Enter password

···········

Forgot my password

Sign in

Terms of use   Privacy & cookies   · · ·

If multi-factor authentication is enabled, the **authentication number** may be displayed.

Take note of the number for entry in the authenticator app.

Microsoft

julene.vaneeden@axnosis.com

Approve sign in request

Open your Authenticator app, and enter the number shown to sign in.

88

No numbers in your app? Make sure to upgrade to the latest version.
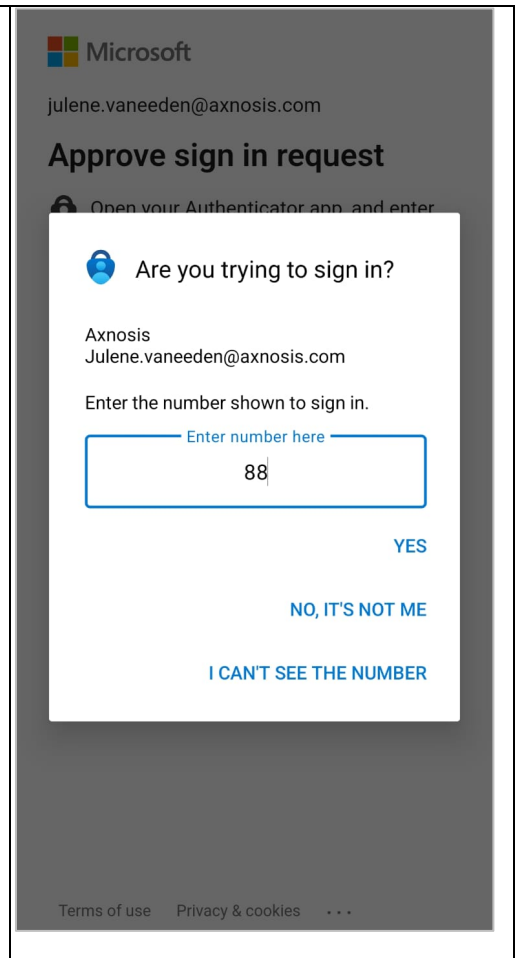
I can't use my Microsoft Authenticator app right now

More information

Terms of use   Privacy & cookies   · · ·
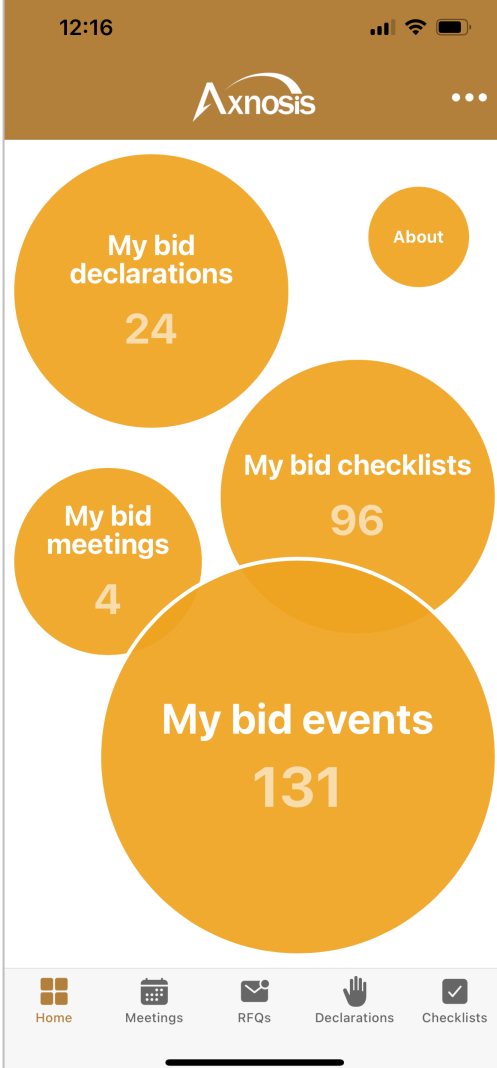
A notification may appear requiring the authentication number to be entered or the user may opt to access the authenticator app manually to complete the authentication process.

Enter the **authentication number** previously provided to approve the sign in then click on the **Yes** button to continue.

3.2 Home screen

TALKING POINTS AND STEPS	MOBILE APP

The **Home** screen opens. The five tabs on this screen gives the user the option to view:
 	
• **My bid meetings**
   o Where meeting type = procurement bid
   o Where the logged in user = meeting owner
• **My bid declarations**
   o Done by logged in user
   o Declarations linked to RFQs
• **My bid checklists**
   o Technical checklists assigned to logged in user
   o Commercial checklists assigned to logged in user
• **My bid events**
   o All RFQs where logged in user is in the technical evaluation committee/commercial evaluation committee
• **About**
 	
Click on the **My bid meetings** bubble.	

3.3 My bid meetings
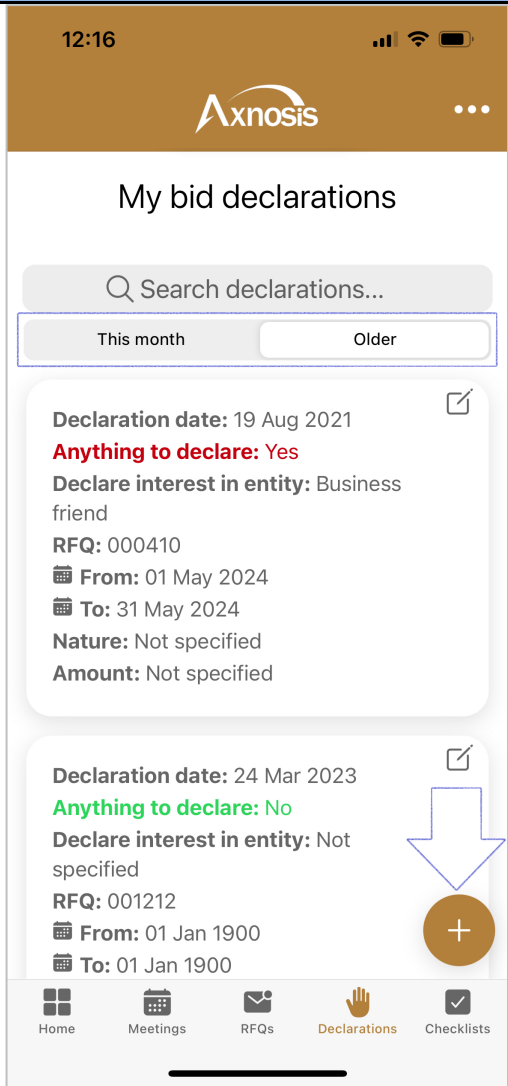
TALKING POINTS AND STEPS	MOBILE APP
The **My bid meetings** screen opens and the user can see the following: • Future bid meetings • Bid meetings scheduled for this month • Older bid meetings Click on the **Home** page button and go to **My bid declarations**.	**12:16** Axnosis ••• My bid meetings 🔍 Search meetings… Future | This month | Older **ERP-ICT Project** **Meeting ID:** Meet-00000015 **Meeting date:** 06 Mar 2025 **Meeting type:** Procurement bid **Status:** Requested Home Meetings RFQs Declarations Checklists
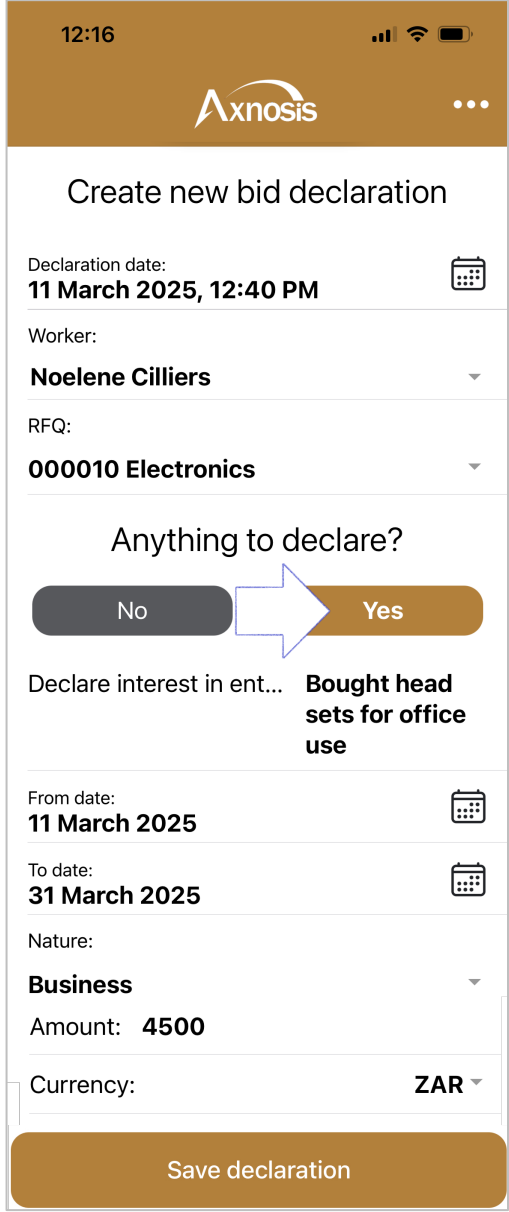
3.3.1 Procurement bid meetings

TALKING POINTS AND STEPS	DYNAMICS HSE 365 MODULE
Meetings where the logged in user is the owner. Go to: **GRC > Governance > Tender management> Meetings** After scoring has been done using the app, close the technical checklist by clicking on the close button and entering a note.	

3.4 My bid declarations

TALKING POINTS AND STEPS	MOBILE APP
Tap on the My bid declarations bubble. Declarations done that were done by the user can be viewed on this screen. • Declarations done in **This month** (current month) • or **Older** declarations Tap on the **+** button at the bottom of the screen to do a declaration.	**12:16** **My bid declarations** 🔍 Search declarations... This month / Older **Declaration date:** 19 Aug 2021 **Anything to declare:** Yes **Declare interest in entity:** Business friend **RFQ:** 000410 📅 **From:** 01 May 2024 📅 **To:** 31 May 2024 **Nature:** Not specified **Amount:** Not specified **Declaration date:** 24 Mar 2023 **Anything to declare:** No **Declare interest in entity:** Not specified **RFQ:** 001212 📅 **From:** 01 Jan 1900 📅 **To:** 01 Jan 1900 Home Meetings RFQs Declarations Checklists

TALKING POINTS AND STEPS	MOBILE APP

Fill in the following information:
 	
- **Declaration date**
- **Worker**
  - Defaults to logged in worker but can be changed
- **Select the RFQ that the declaration is being done for**
- **Anything to declare: Select No/Yes**
- **If Yes:**
  - **Enter from/to date**
  - **Nature**
  - **Amount**
  - **Currency**
 	
Click on the **Save declaration** button.
 	
You have now created a new bid declaration.
	12:16
	
	Create new bid declaration
	
	Declaration date:
	11 March 2025, 12:40 PM
	
	Worker:
	Noelene Cilliers
	
	RFQ:
	000010 Electronics
	
	Anything to declare?
	
	No / Yes
	
	Declare interest in ent… **Bought head sets for office use**
	
	From date:
	11 March 2025
	
	To date:
	31 March 2025
	
	Nature:
	Business
	
	Amount: **4500**
	
	Currency: **ZAR**
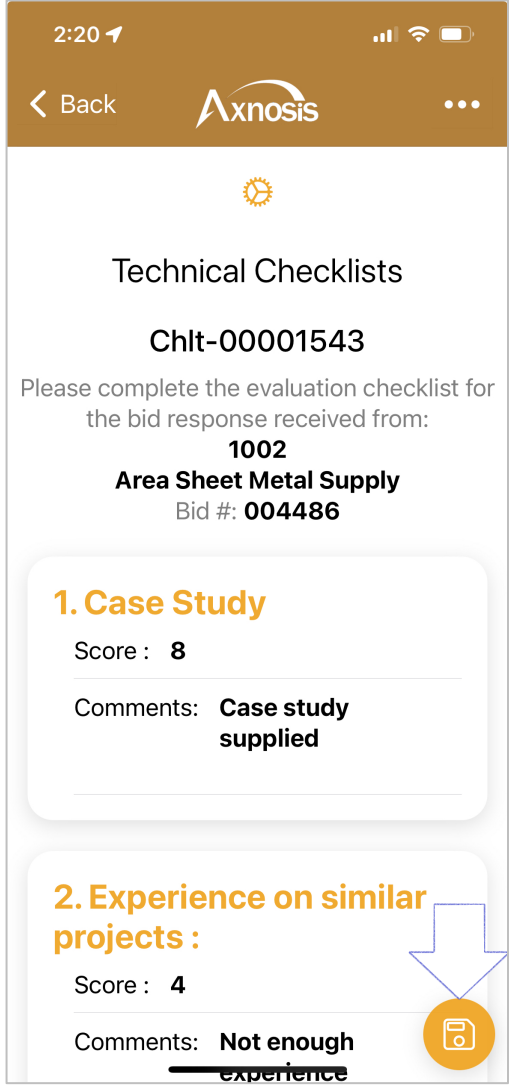	
	Save declaration

3.4.1 Declaration of interest register

TALKING POINTS AND STEPS	DYNAMICS HSE 365 MODULE
Path of declaration of interest register in D365. Go to: **GRC > Governance > Legal > Declaration of interest register**	

3.5 Viewing technical or commercial checklists on the app

TALKING POINTS AND STEPS	MOBILE APP
On the **Home** page, tap on the **My bid checklists**. The **My bid checklists** screen opens with two options: • Technical checklists • Commercial checklists	12:16 **My bid checklists** 🔍 Search checklists... Technical　　　Commercial **Chlt-00000136** ⚙️ **Status:** Created **RFQ Case ID:** 000460 **Description:** Technical checklist for RFQ: 000460 **Chlt-00000137** ⚙️ **Status:** Created **RFQ Case ID:** 000460 **Description:** Technical checklist for RFQ: 000460 Home　Meetings　RFQs　Declarations　Checklists

3.5.1 Scoring technical checklists

TALKING POINTS AND STEPS	MOBILE APP
Open one of the technical checklists. Score every line and enter a comment. Click on the **save** icon before closing the checklist.	

3.5.1.1 View technical checklist scoring done on the app

TALKING POINTS AND STEPS	DYNAMICS HSE 365 MODULE
To view the technical checklist in D365: Go to: **GRC > Governance > Tender management> All requests for quotations** Select the relevant RFQ. On the RFQ in the action pane, click on the technical analysis button. Select the relevant checklist.	

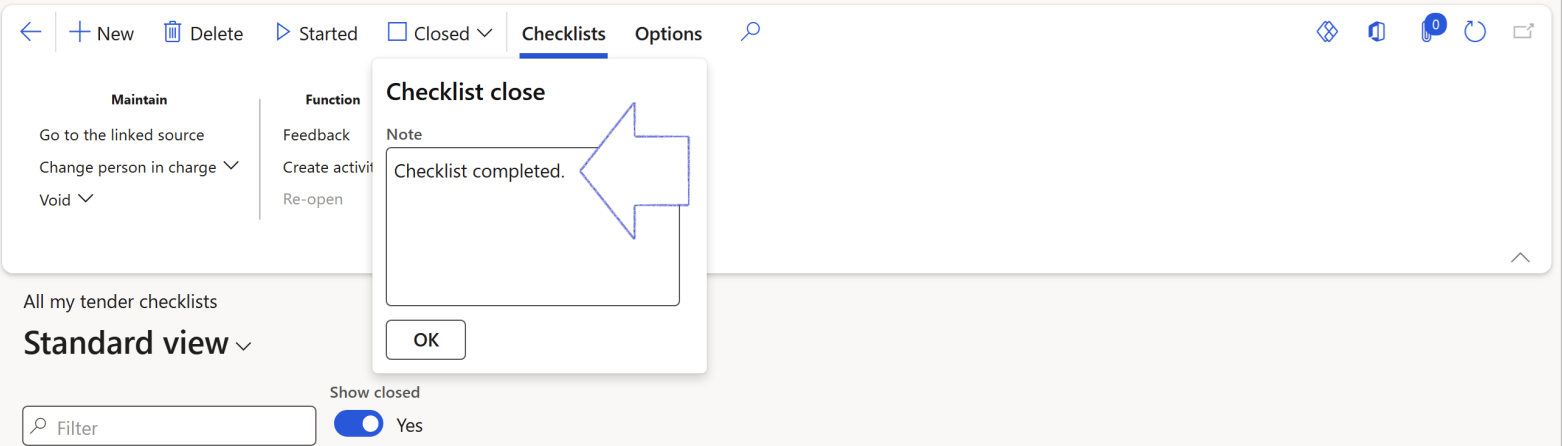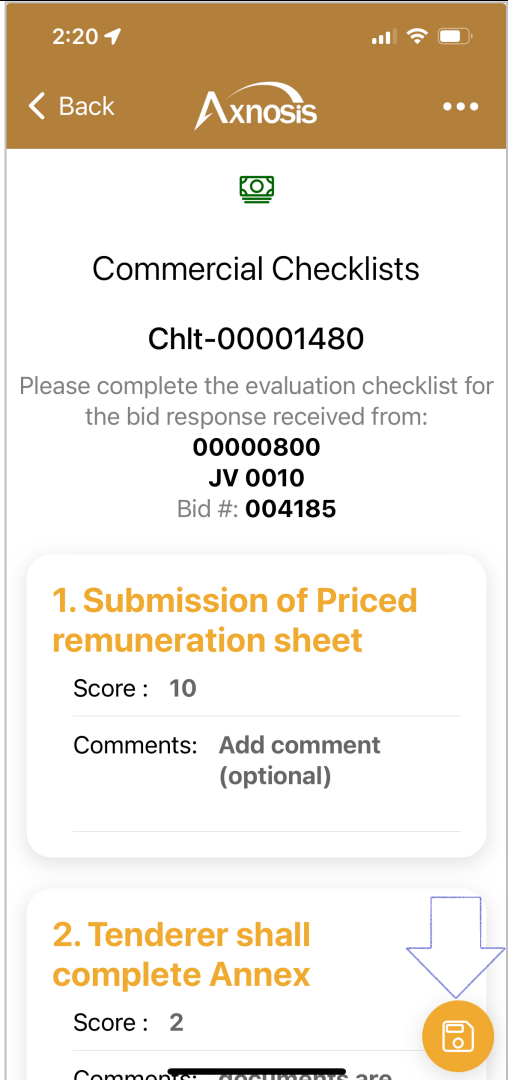The screenshot shows a Dynamics 365 interface:

← Save + New 🗑 Delete View envelope View history Options

Chlt-00001543 : Technical checklist for RFQ: 004486 | Standard view ⌄

Checklist feedback

Vendor: Area Sheet Metal Supply   Case Study   Closed

Checklist

Line number	Name	Score	Worker	Worker mandatory	Date checked	Date mandatory	Comment	Task status
1.0000000000	Case Study	8	Noelene Cilliers		3/11/2025		✓	Not started
2.0000000000	Experience on similar project...	4	Noelene Cilliers		3/11/2025		✓	Not started
3.0000000000	Resource & Key staff	8	Noelene Cilliers		3/11/2025			Not started
4.0000000000	Cyber Security	9	Noelene Cilliers		3/11/2025			Not started
5.0000000000	References	4	Noelene Cilliers		3/11/2025		✓	Not started

Comments
Case study supplied

Description/note
Present a case study specific to Winter City 2024 based on the Scope of work shared.

Related information

Checklist header

Checklist ID
Chlt-00001543

Checklist description
Technical checklist for ...

Source type
RFQ

Source ID
004486

Job plan
TJP001

Element
Vendor

Element value
1002

Person in charge

Control ID

Control description
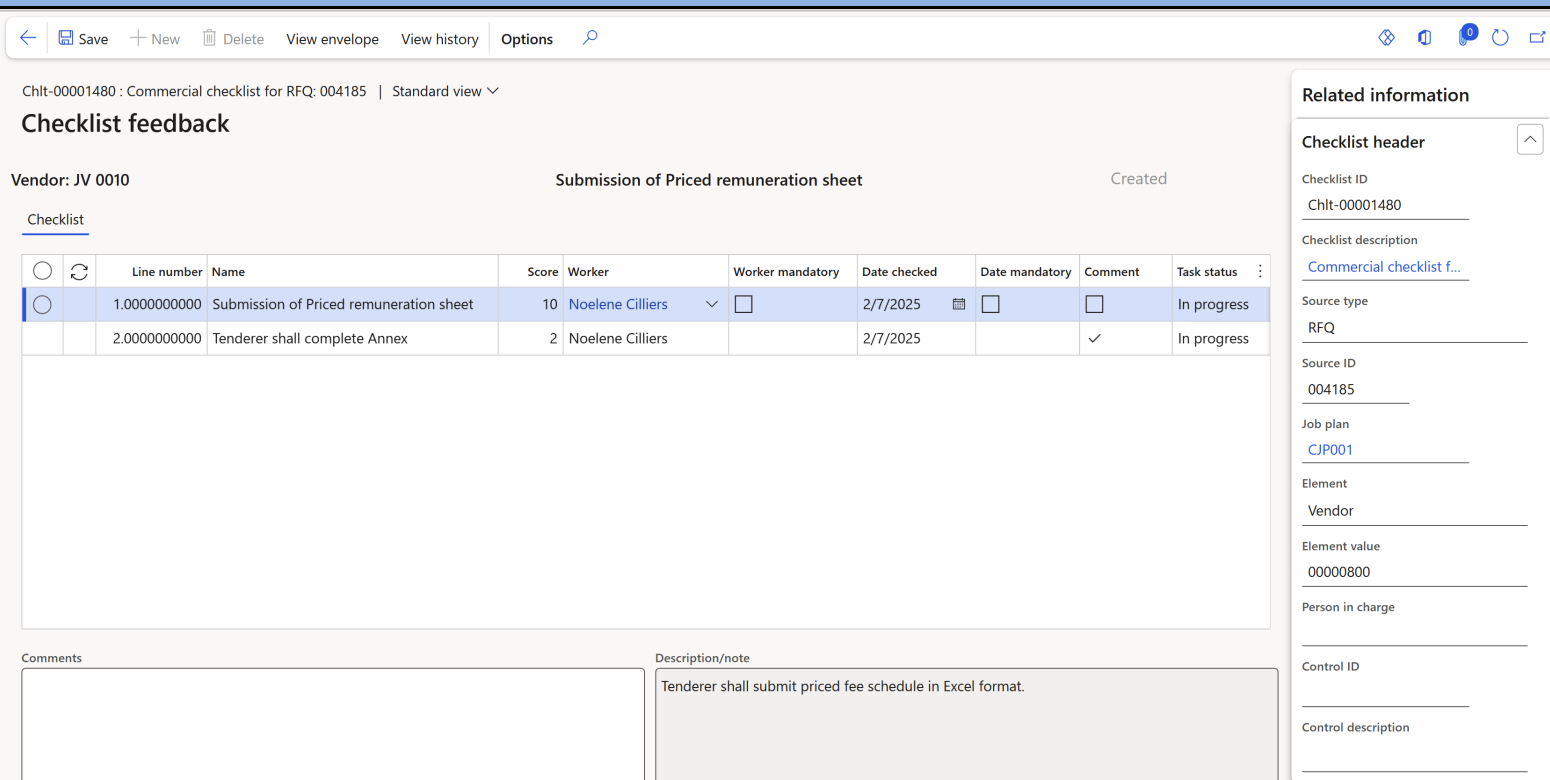
3.5.1.1   Closing technical checklist

TALKING POINTS AND STEPS	DYNAMICS HSE 365 MODULE
After scoring has been done using the app, close the technical checklist by clicking on the close button and entering a note.	

3.5.2   Scoring commercial checklists

TALKING POINTS AND STEPS	MOBILE APP
Open one of the commercial checklist. Score every line and enter a comment. Click on the **save** icon before closing the checklist.	

3.5.2.1   View commercial checklist scoring done on the app
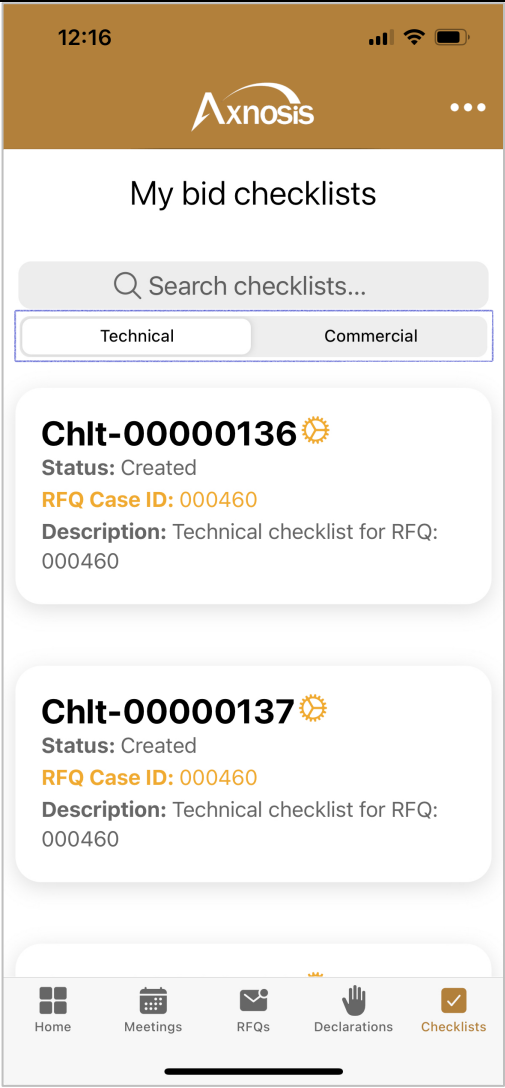
TALKING POINTS AND STEPS	DYNAMICS HSE 365 MODULE
To view the commercial checklist in D365: Go to: **GRC > Governance > Tender management> All requests for quotations** Select the relevant RFQ. On the RFQ in the action pane, click on the commercial analysis button. Select the relevant checklist.	← 🖫 Save + New 🗑 Delete View envelope View history Options 🔍 ◈ 🎤 ⓪ ↻ ↗ Chlt-00001480 : Commercial checklist for RFQ: 004185 | Standard view ∨ **Checklist feedback** Vendor: JV 0010 Submission of Priced remuneration sheet Created Checklist **Related information** **Checklist header** ∧ Checklist ID Chlt-00001480 Checklist description Commercial checklist f... Source type RFQ Source ID 004185 Job plan CJP001 Element Vendor Element value 00000800 Person in charge Control ID Control description Comments Description/note Tenderer shall submit priced fee schedule in Excel format.

Checklist table:

		Line number	Name	Score	Worker	Worker mandatory	Date checked	Date mandatory	Comment	Task status	
○	↻										⋮
○		1.0000000000	Submission of Priced remuneration sheet	10	Noelene Cilliers ∨	☐	2/7/2025 📅	☐	☐	In progress	
		2.0000000000	Tenderer shall complete Annex	2	Noelene Cilliers		2/7/2025		✓	In progress	

3.5.2.1   Closing commercial checklist

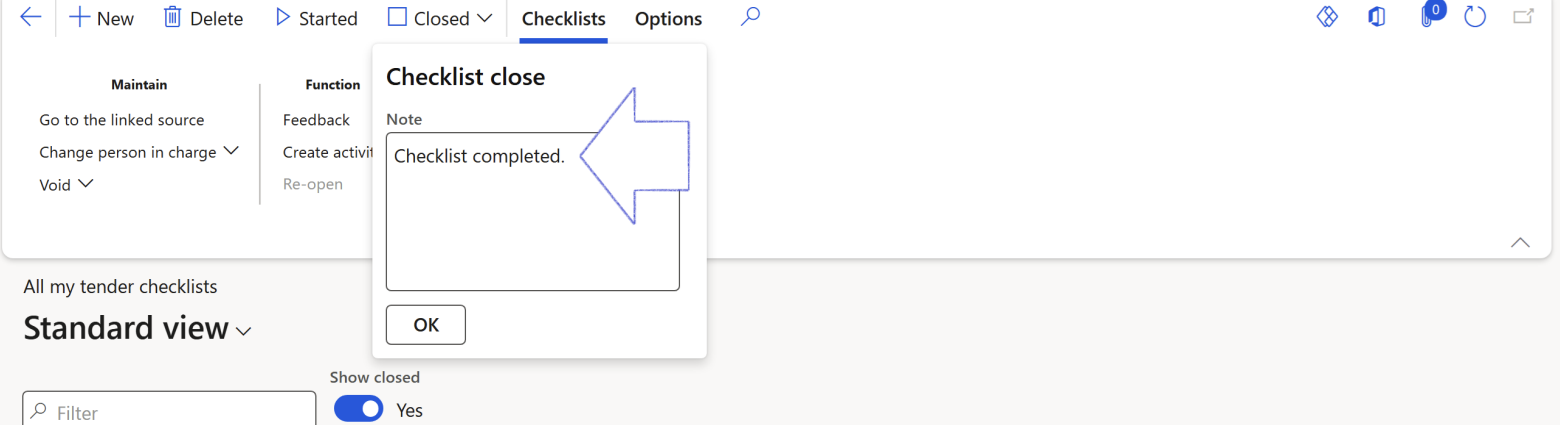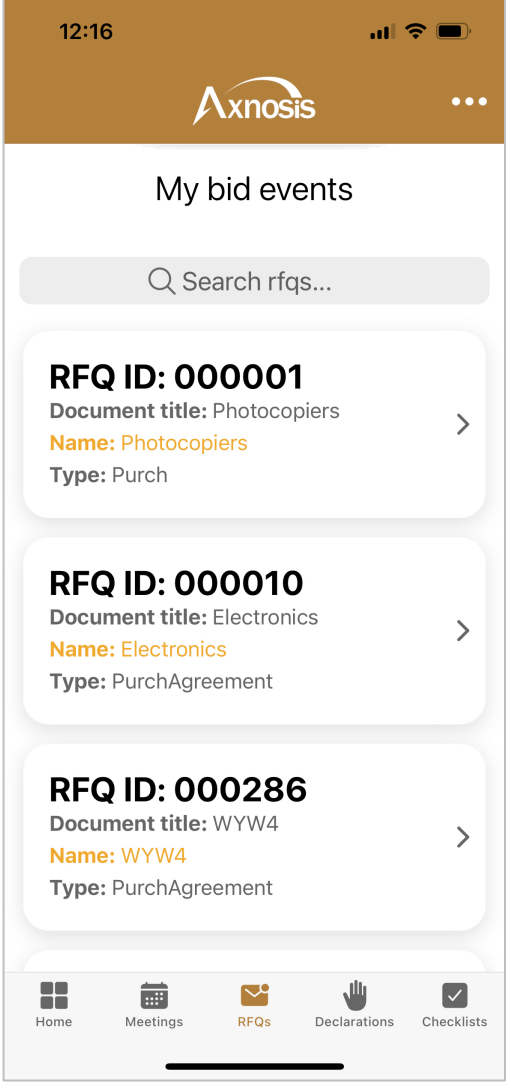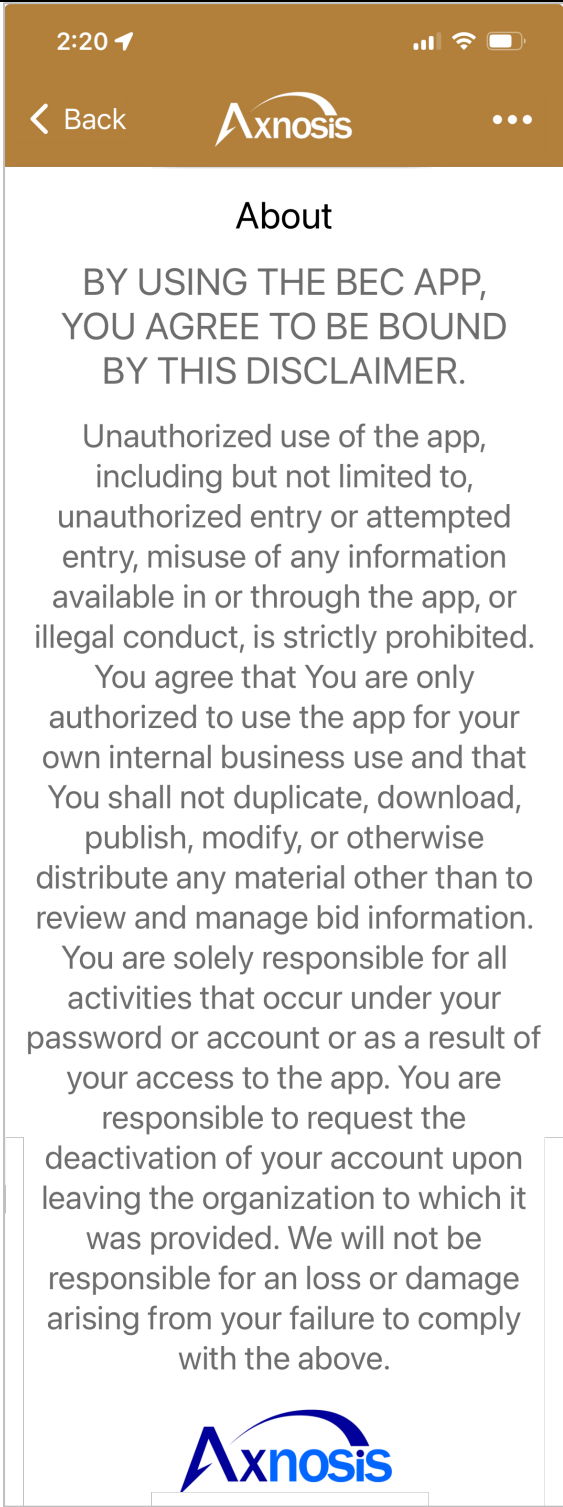| TALKING POINTS AND STEPS	DYNAMICS HSE 365 MODULE
After scoring has been done using the app, close the commercial checklist by clicking on the close button and entering a note.	

3.5.3 Viewing bid events (RFQs)

TALKING POINTS AND STEPS	MOBILE APP
On the **Home** page, tap on the **My bid events** bubble. The **My bid events** screen opens with a list of all the RFQs. Open the RFQ you want to view.	

TALKING POINTS AND STEPS	MOBILE APP
The **technical** and **commercial** checklists are displayed. Go back to the **Home** page and click on the **About** bubble.	12:16 **My bid checklists** 🔍 Search checklists... Technical Commercial **Chlt-00000136**⚙ **Status:** Created **RFQ Case ID:** 000460 **Description:** Technical checklist for RFQ: 000460 **Chlt-00000137**⚙ **Status:** Created **RFQ Case ID:** 000460 **Description:** Technical checklist for RFQ: 000460 Home Meetings RFQs Declarations Checklists

3.5.4 Viewing the T's and C's for using the app

TALKING POINTS AND STEPS	MOBILE APP
The **about** screen gives the T's and C's for using the app.	**2:20** **< Back** Axnosis **•••** **About** BY USING THE BEC APP, YOU AGREE TO BE BOUND BY THIS DISCLAIMER. Unauthorized use of the app, including but not limited to, unauthorized entry or attempted entry, misuse of any information available in or through the app, or illegal conduct, is strictly prohibited. You agree that You are only authorized to use the app for your own internal business use and that You shall not duplicate, download, publish, modify, or otherwise distribute any material other than to review and manage bid information. You are solely responsible for all activities that occur under your password or account or as a result of your access to the app. You are responsible to request the deactivation of your account upon leaving the organization to which it was provided. We will not be responsible for an loss or damage arising from your failure to comply with the above.

3.6   The ellipsis on the D365 BEC mobile app

TALKING POINTS AND STEPS	MOBILE APP
The **ellipsis** at the top of the screen provides the following functions: • Displays the **D365 Legal entity** that the user is currently logged into • The **Refresh data** button is used to update the app with recently captured data (via the app and D365) • The **Help** button opens the **Axnosis Contact Support** screen • **Logout**	