WORLD BANK GROUP

eConsultant

# Electronic Selection of Consultants

## User Guide for Consulting Firms

Version 2

This User Guide was produced by the Operations and Corporate Procurement Groups and the Information Solutions Group Global Support  Training Team of the World Bank Group.

September, 2007

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WORLD BANK GROUP

# eConsultant

## User Guide for Consulting Firms

## *Introduction*

The electronic selection of consultants (WBG eConsultant) is a secure web-based tool that supports current and prospective consulting firms doing business with the World Bank. WBG eConsultant contributes to the transparency of the selection process by allowing consulting firms to view opportunities, express interest, obtain documents, send proposals, and communicate with the Bank in a secure online environment.

WBG eConsultant uses a "wizard" interface to walk you through each stage of the process.

You may use WBG eConsultant to:

- Manage the overall selection process
- Create and submit expressions of interest
- View and download Request for Proposal packages, and submit Requests for Clarification
- Create and submit technical and financial proposals
- Negotiate with the World Bank Group if your firm is selected for award

**Note:** WBG eConsultant is currently designed to support consulting **firms** only. In the future, the system may be modified to support individual consultants.

## *Create World Bank Group and WBG eConsultant accounts*

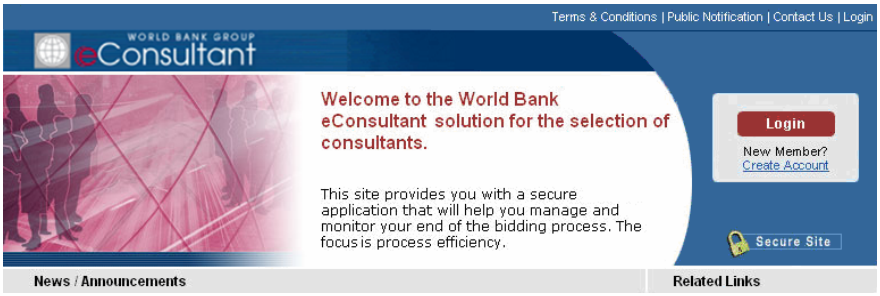
By creating a WBG eConsultant account, you are agreeing to be the primary contact for your firm. As primary contact, you may express interest in opportunities on behalf of your organization. You will also manage and coordinate all correspondence with the World Bank for those opportunities in which your firm is participating.

Before creating a WBG eConsultant account, you must first create your World Bank Group account.

**Note:** To access WBG eConsultant, consulting firms must have an internet connection and Microsoft Internet Explorer Version 6.0 or above.

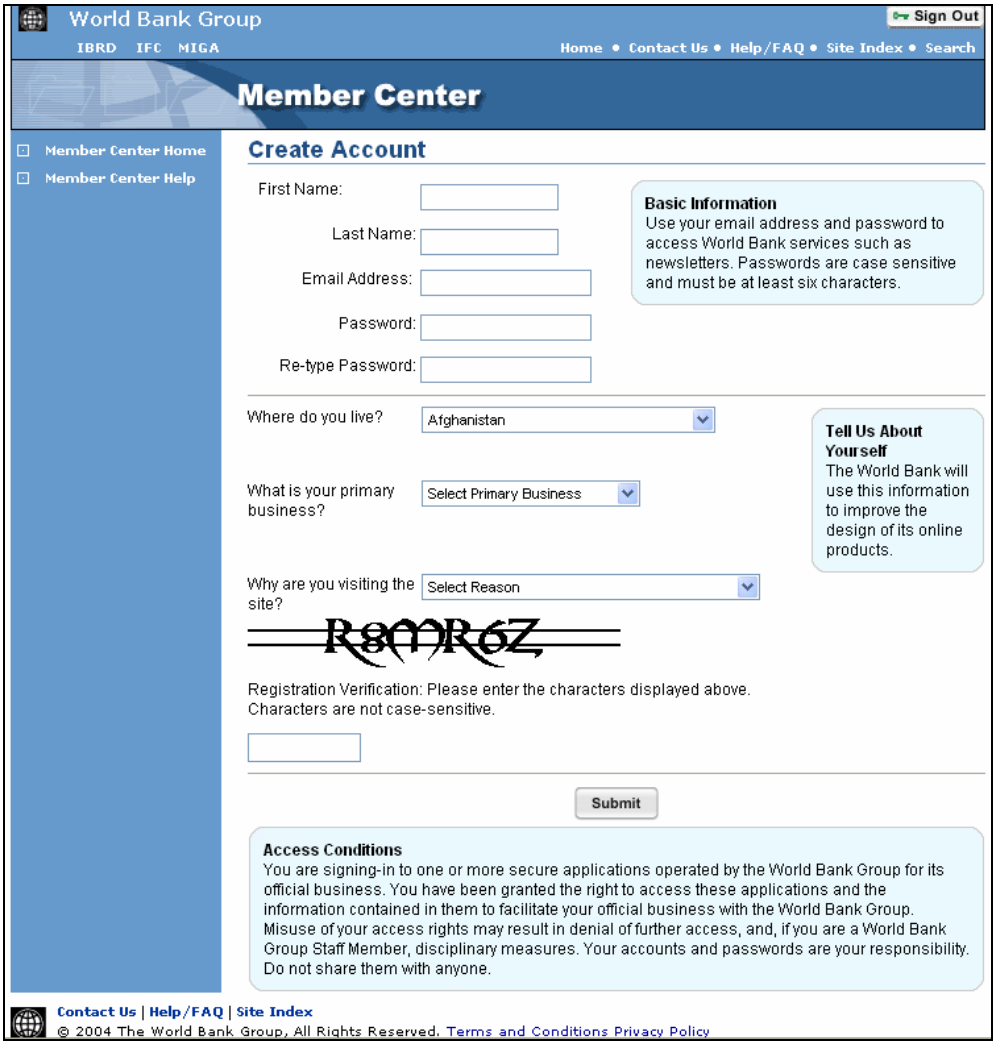
1. To log in, type www.worldbank.org/wbgeconsultant in your browser's address bar.

   The WBG eConsultant main page appears.




2. Click 


   The Member Center Create Account page appears. On this screen you are creating a World Bank Group account that will allow you to access WBG eConsultant and other web services.

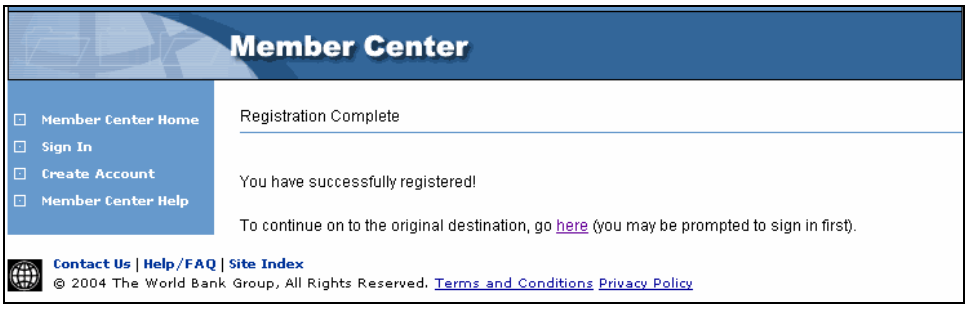


3. Fill in the form.

**Note:** Passwords are case-sensitive and must be at least six characters;
Select "Consultant" as your primary business;
Select "To find business opportunities" as the reason for visiting the site.

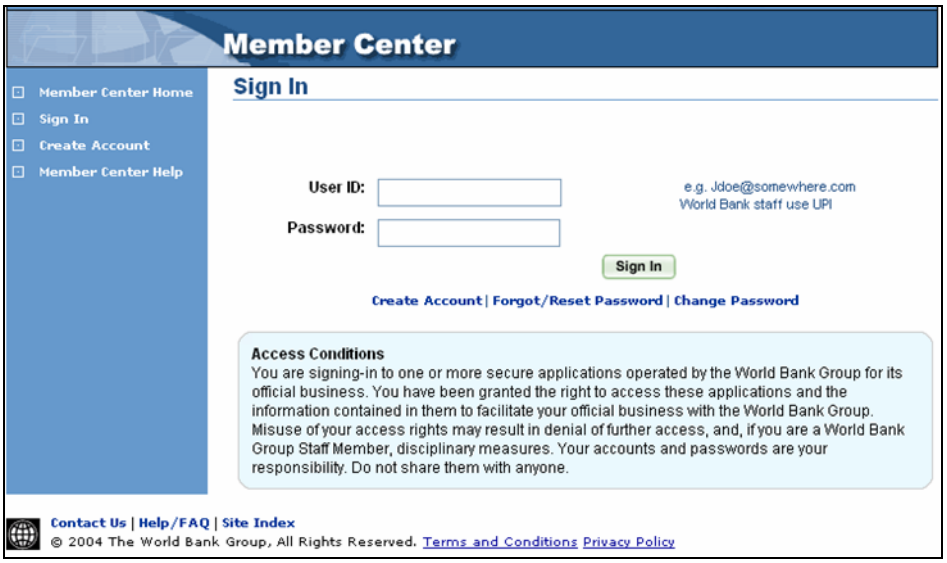
4. Read the Access Conditions at the bottom of the page and click Submit.

   The registration confirmation page appears.




5. To proceed to WBG eConsultant, click the here hyperlink in the message.

   The Member Center sign in page appears.




6. Enter your email address and the password that you just created.

7. Click Sign In.

## Create a WBG eConsultant account

The WBG eConsultant account creation page appears. On this form, you will provide specific information about yourself and your business.

WORLD BANK GROUP eConsultant

Enter the following information and click 'Submit' to create an account for the World Bank's eConsult system. A confirmation will be sent to your email address. A business need not be an approved World Bank Vendor nor submitted an Registration Application in order to express interest or submit a proposal. A Registration Application is only required for firms who have been recommended for a award. To be approved as a registered World Bank Vendor, the business enterprise must complete the Vendor Registration Application and be able to demonstrate that it has been and is offering goods/services under the business name. Sole Proprietors must be able to demonstrate that they have been engaged in their business activity for not less than one year.

Fields denoted with red ' * ' are required.

**Contact and Password Information**

| | |
|---|---|
| First Name * | eConsult |
| Last Name * | eConsult Tester |
| Title * | |
| Telephone Number * | |
| Fax Number | |
| Email Address * | testing@thejkgroup.com |

**Firm Information**

| | |
|---|---|
| Firm Name * | |
| Legal Form of Business * | <- Select -> |
| Address * | |
| Address 2 | |
| City * | |
| State (mandatory if US) | |
| Region | |
| Zip / Postal Code | |
| Country * | Afghanistan |
| Year Established * | |
| Full Time Employees * | |
| DUNS Number | |

**Diversity Information for Firms with United States Offices or Presence**

| | |
|---|---|
| Are you currently certified as a Minority / Women / Disabled Business Enterprise (MWDBE) ? | ○ Yes ○ No |
| If yes, list certifying organization. | |

Submit

**Note:** Fields marked with an asterisk are required fields.

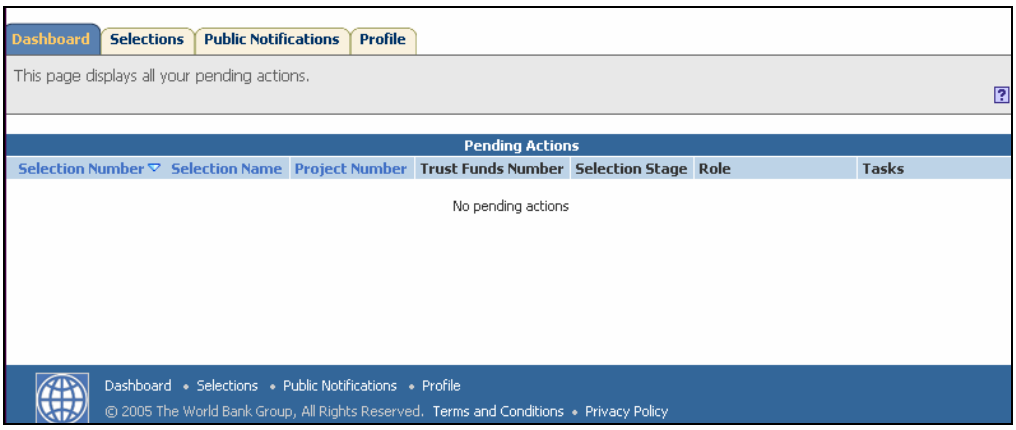
8. Complete the form and click **Submit**.

   You have successfully created your WBG eConsultant account.

## *WBG eConsultant Navigation*

### Dashboard tab

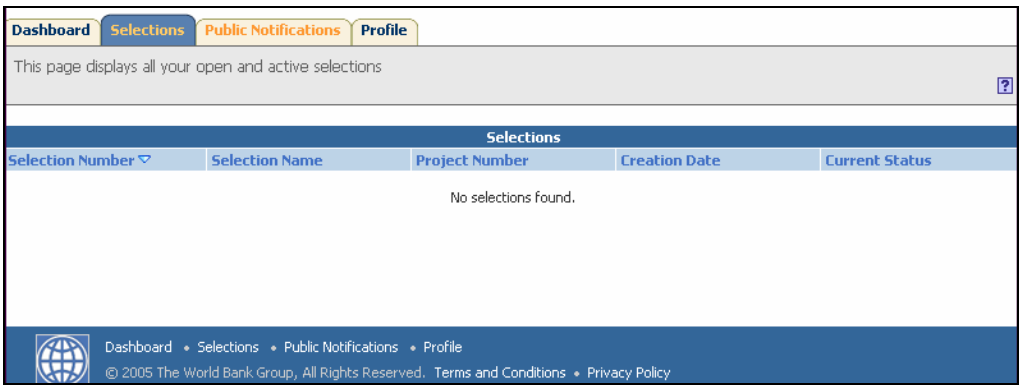
Once you've logged on to WBG eConsultant, you'll see the personalized Dashboard page. The Dashboard lists all pending selections for which you have expressed interest or were invited to propose.




WBG eConsultant uses tabs to assist you in navigating. In addition to the Dashboard tab, you will see three other tabs at the top of the page: Selections, Public Notifications and Profile.

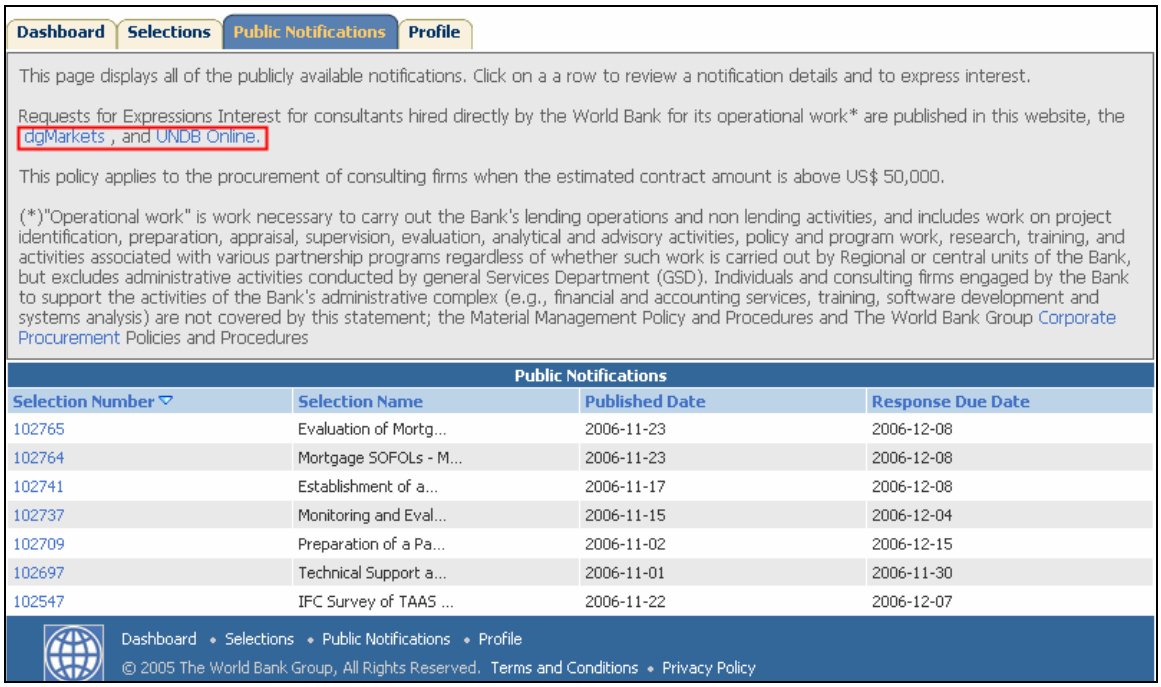
### Selections tab

The Selections tab lists all selections that you have worked on.



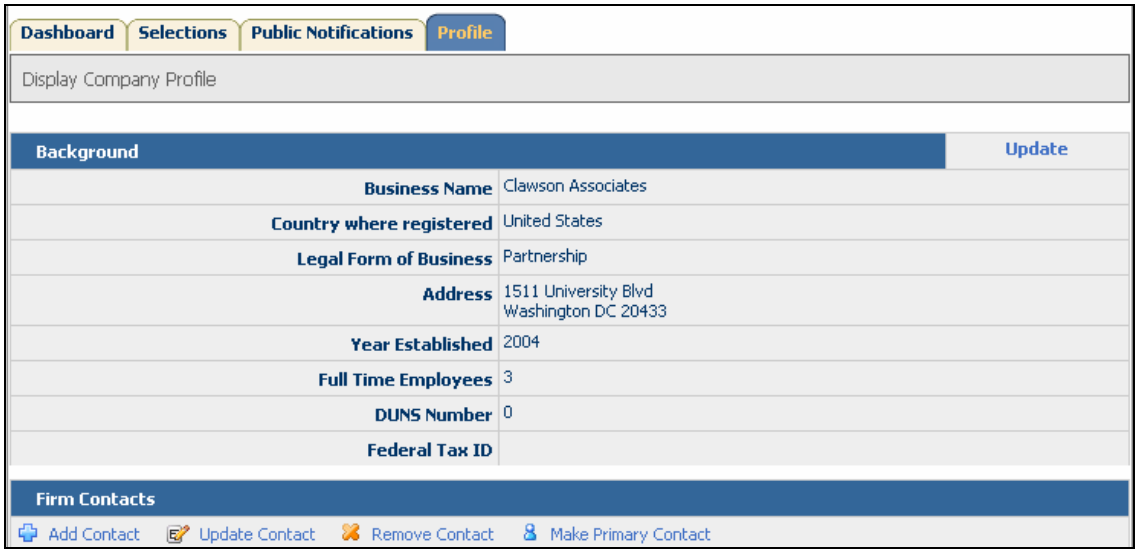
## Public Notifications tab

Public Notifications lists all current opportunities available within WBG eConsultant. This page also contains links to the dgMarkets and UNDB Online websites for your convenience.



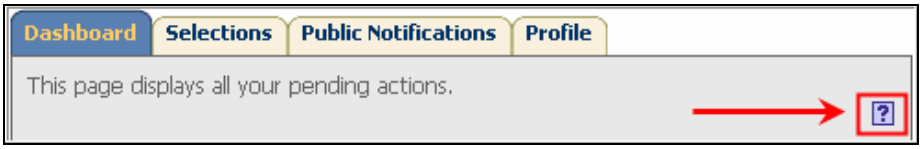

## Profile tab

On the Profile tab, you can update information for your firm.



## *Additional Help and Assistance*

If you need help with WBG eConsultant, click the Help hyperlink located on the right- hand side of most pages.




Check the WBG eConsultant Welcome page for links to video demonstrations and a Quick Reference Guide.

If you need additional assistance, please contact the World Bank Group's Global Support Center by sending an email to wbgeconsultant@worldbank.org.

**Note:** WBG eConsultant is only available in English.

## *View Notification and Express Interest*

Notifications are published on dgMarkets, UNDB Online and within the WBG eConsultant system. No registration is required to view notifications on the Bank's internet site. However in many cases, the Team Leader for the opportunity (or selection, as we call it) will include attachments such as the Terms of Reference in the notification. You will only be able to see attachments while you are logged in to WBG eConsultant. Registration is required to express interest in an opportunity listed on WBG eConsultant. (For instructions, see "Create a WBG eConsultant account" on page 4.)

### Subscribe to a Notification

The first step in Expressing Interest is to subscribe to a Notification or Advertisement. When you subscribe, the notification is added to your personalized Dashboard page. To subscribe,

1. Log into WBG eConsultant.

2. Click the Public Notifications tab to view all current notifications.

The notifications page appears.

Dashboard | Selections | Public Notifications | Profile

This page displays all of the publicly available notifications. Click on a a row to review a notification details and to express interest.

Requests for Expressions Interest for consultants hired directly by the World Bank for its operational work* are published in this website, the dgMarkets , and UNDB Online.

This policy applies to the procurement of consulting firms when the estimated contract amount is above US$ 50,000.

(*)"Operational work" is work necessary to carry out the Bank's lending operations and non lending activities, and includes work on project identification, preparation, appraisal, supervision, evaluation, analytical and advisory activities, policy and program work, research, training, and activities associated with various partnership programs regardless of whether such work is carried out by Regional or central units of the Bank, but excludes administrative activities conducted by general Services Department (GSD). Individuals and consulting firms engaged by the Bank to support the activities of the Bank's administrative complex (e.g., financial and accounting services, training, software development and systems analysis) are not covered by this statement; the Material Management Policy and Procedures and The World Bank Group Corporate Procurement Policies and Procedures

**Public Notifications**

| Selection Number | Selection Name | Published Date | Response Due Date |
|---|---|---|---|
| 102765 | Evaluation of Mortg... | 2006-11-23 | 2006-12-08 |
| 102764 | Mortgage SOFOLs - M... | 2006-11-23 | 2006-12-08 |
| 102741 | Establishment of a... | 2006-11-17 | 2006-12-08 |
| 102737 | Monitoring and Eval... | 2006-11-15 | 2006-12-04 |
| 102709 | Preparation of a Pa... | 2006-11-02 | 2006-12-15 |
| 102697 | Technical Support a... | 2006-11-01 | 2006-11-30 |
| 102547 | IFC Survey of TAAS ... | 2006-11-22 | 2006-12-07 |

3. Find the notification you wish to express interest in, and click on its Selection Number to view the details.

Dashboard | Selections | Public Notifications | Profile

You can subscribe to this notification by clicking the 'Subscribe' button.

Printer Friendly Version

**General Information**

| | |
|---|---|
| **Assignment** | Moldova -- Impact of deteriorating district heating on residential households |
| **Selection Number** | 102955 |
| **Notice Type** | Request for Expression of Interest |
| **Advertise Electronically** | World Bank Internet, dgMarkets, and UNDB Online |
| **Notification Publication Date** | 12/14/2006 |
| **Deadline for Submission** | 12/29/2006 |
| **Language of the Notice** | English |
| **Optional, Common Procurement Vocabulary (CPV) for services to be procured** | |

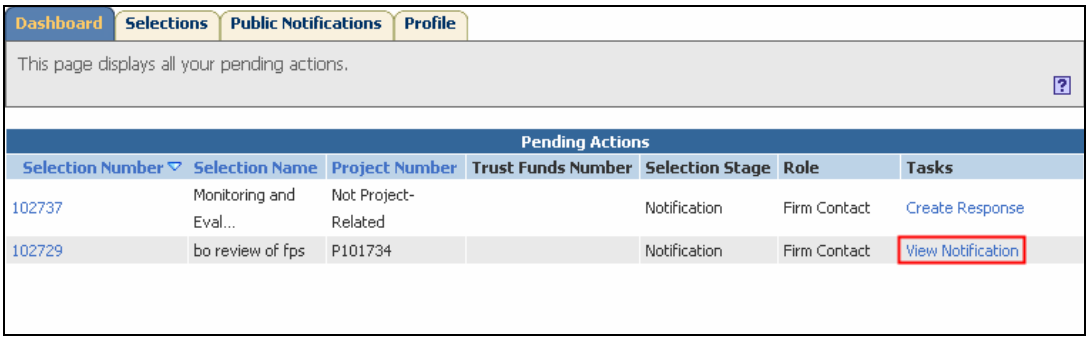
**Contact Information for Advertisement**

| | |
|---|---|
| **Contact Person** | |

4. After reading the selection details, scroll to the bottom of the Notification, and click **Subscribe to Notification**.

This action places the notification on your Dashboard and enables you to begin the expression of interest process.

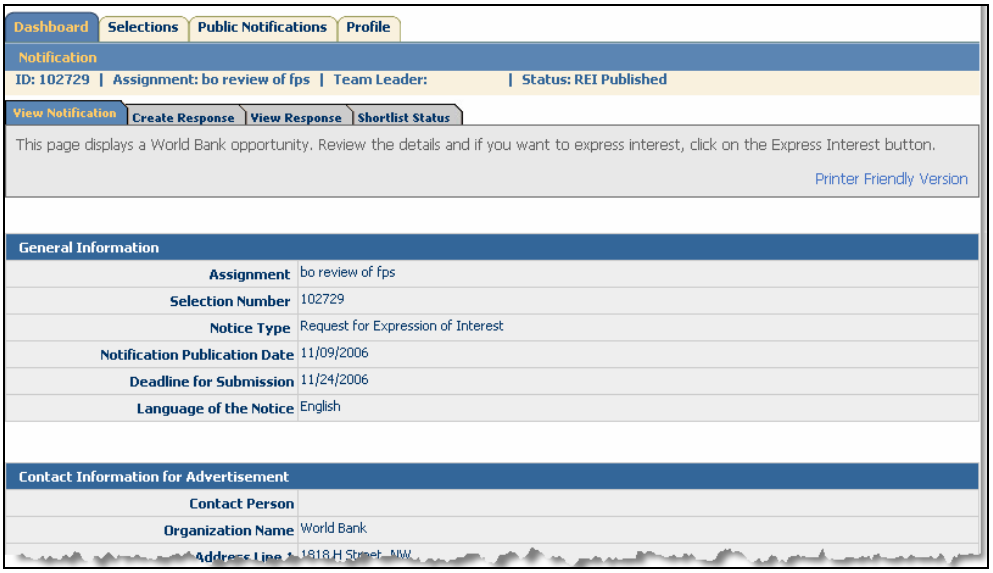
**Note:** All selections to which you have subscribed will be listed on the Dashboard tab. If you click the Selection Number hyperlink, you will see the Selection summary. To perform an action, click the appropriate hyperlink in the Tasks column.




## Express interest

1. At the Dashboard tab, click the View Notification hyperlink in the Tasks column.

   The View Notification tab appears.



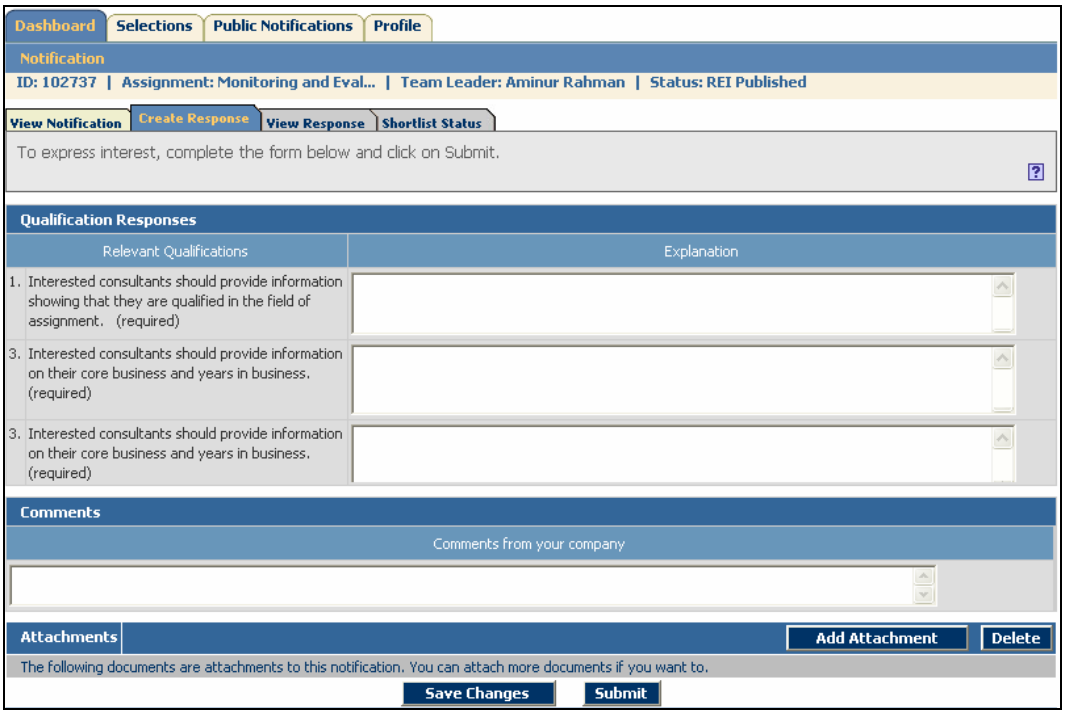

   Notice that the top of your screen has changed. Just below the Level 1 tabs, you see a Level 2 indicator telling you that you are at the Notification stage of the process, as shown below.

Below the Level 2 indicator, you see Level 3 tabs: View Notification; Create Response; View Response; and Shortlist Status.

These tabs are designed to guide you step-by-step through the Bank Group's procurement process. Once you complete the information on one tab, the next tab becomes active. In this way, you are able to work through the process with an understanding of what tasks are ahead of you, as well as what tasks are completed.

2. Scroll to the bottom of the screen and click **Express Interest**.

   The Create Response form opens.



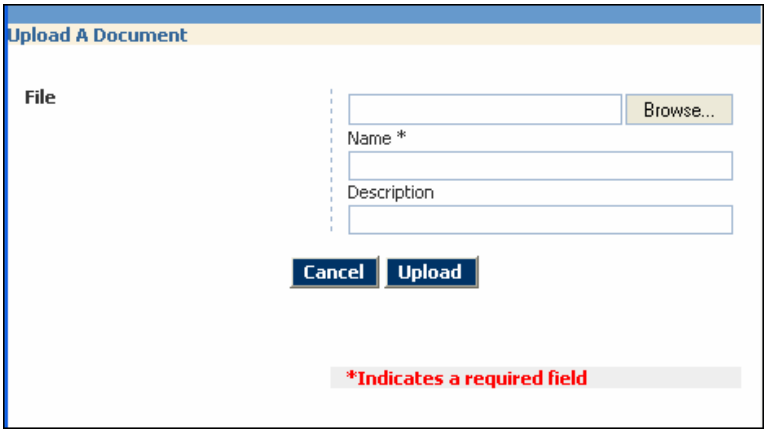

3. Fill in the Qualification explanations in the spaces provided and enter additional comments if necessary.

### *Add attachments*

You may attach documents to your Expression of Interest.

1. On the Create Response tab, click **Add Attachment**.

The Upload a Document screen appears.




2. Click Browse... to locate your file.

   The Name field is automatically populated with your document name. You may change this name if you wish.

3. Enter a description, if desired.

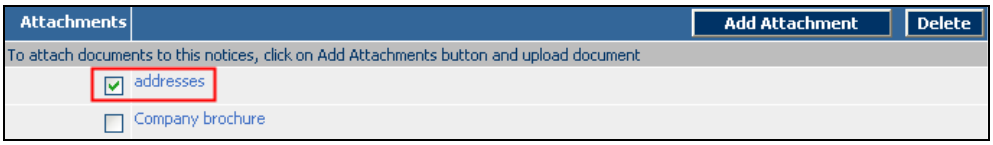
4. Click Upload.

You may attach additional documents if necessary.

***Delete an attachment***

Follow the steps below to delete an attachment.

1. On the Create Response tab, click the checkbox to select the attachment to delete, as show below.

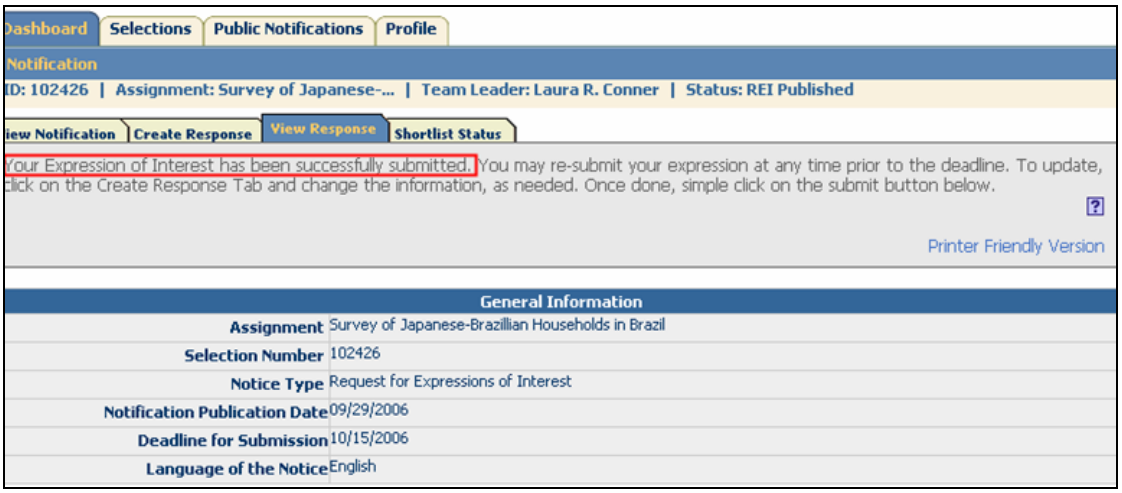



2. Click Delete.

   The attachment is removed from the list.

3. Once you have completed the form, click Submit.

The View Response tab is automatically activated, and displays a message that your expression of interest has been submitted.




At any time until the deadline, you may return to the Create Response tab to make changes and resubmit.

Once the deadline to express interest has passed, the Bank Group's selection team will review and rank all expressions of interest they have received.

## View the status of a submission

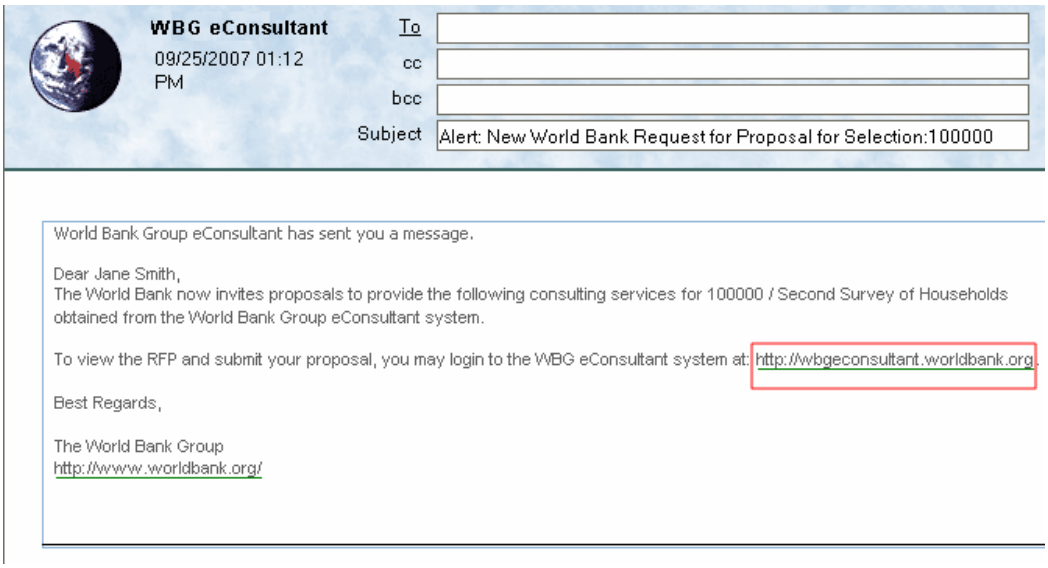
You may check the status of your submission at any time. Additional email notifications on status changes will also be sent to you. Delivery of email notifications can not be guaranteed however. Therefore, consultants should check their status directly on WBG eConsultant. Short list statuses include: EOI Drafting, EOI Submitted, Invited, and Not Invited.

1. To view the status of a submission, click the Shortlist Status tab.

## *View RFP and submit proposals*

WBG eConsultant enables short-listed consultant firms to first view and download the Request for Proposal (RFP) package and then confirm their intention to propose. Once you have confirmed, you may post Requests for Clarifications (RFCs), view responses to clarifications, and upload Technical and Financial proposals.

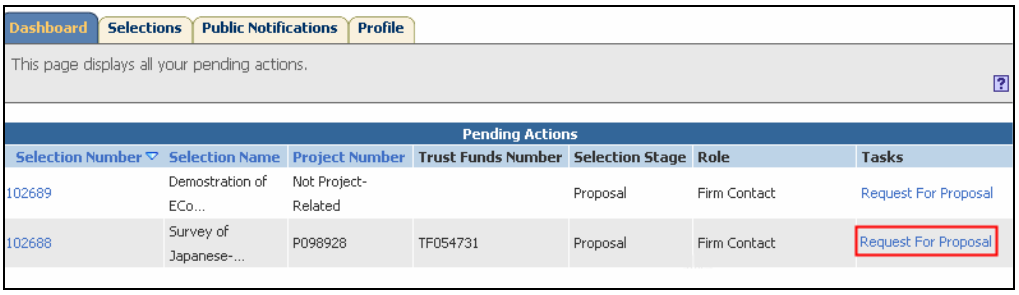
After the shortlisting process is complete, you will receive an email notifying you of the status of your expression of interest. If you were short listed, the email will contain a link to access the WBG eConsultant system.



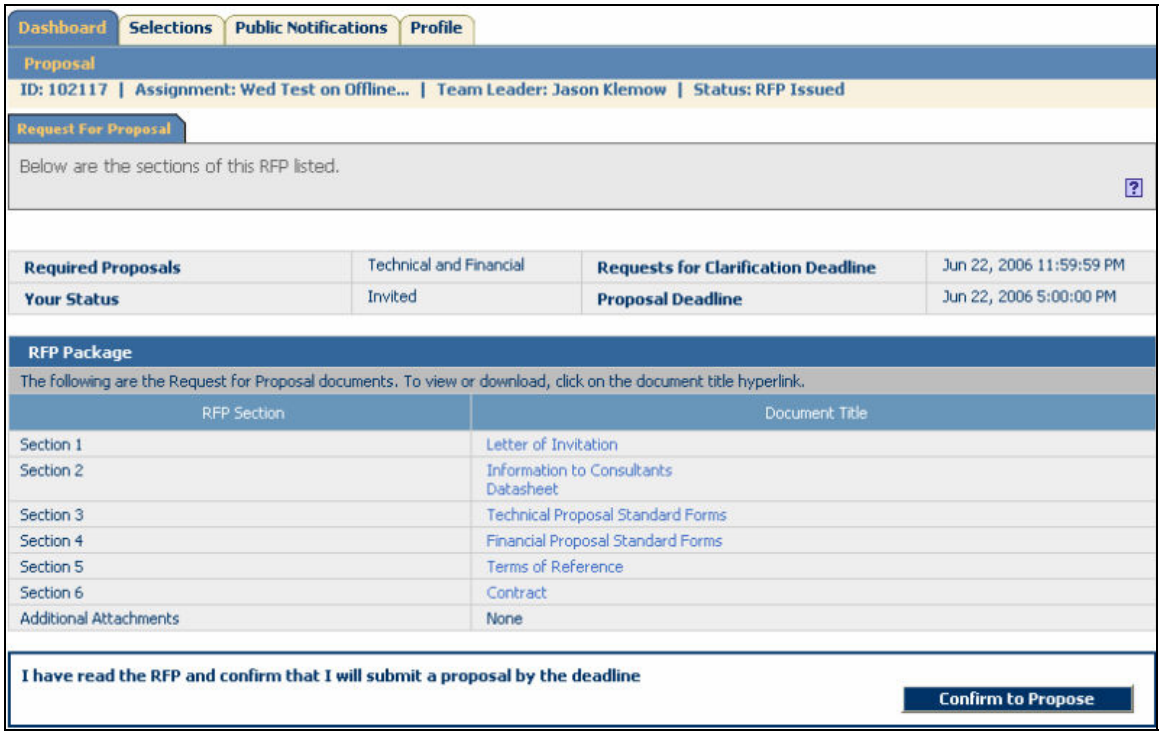

1. To open WBG eConsultant, click http://wbgeconsultant.worldbank.org.

2. Log in to the WBG eConsultant system.

3. At the Dashboard page, click the Request for Proposal task hyperlink, as shown below.



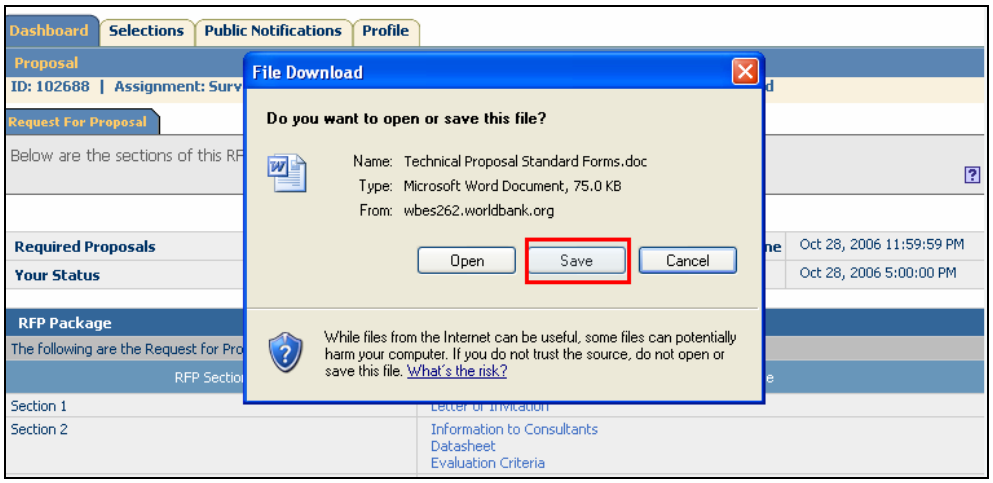
The Request for Proposal tab appears.

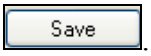



The Request for Proposal Tab (pre-confirmation) allows you to view key dates and to download sections of the RFP. Prior to submitting Requests for Clarifications and Proposals, you must confirm your intent to propose by clicking on the Confirm to Propose button.

1. To view or download an RFP document, click on the document title.

   The File Download dialog box appears.



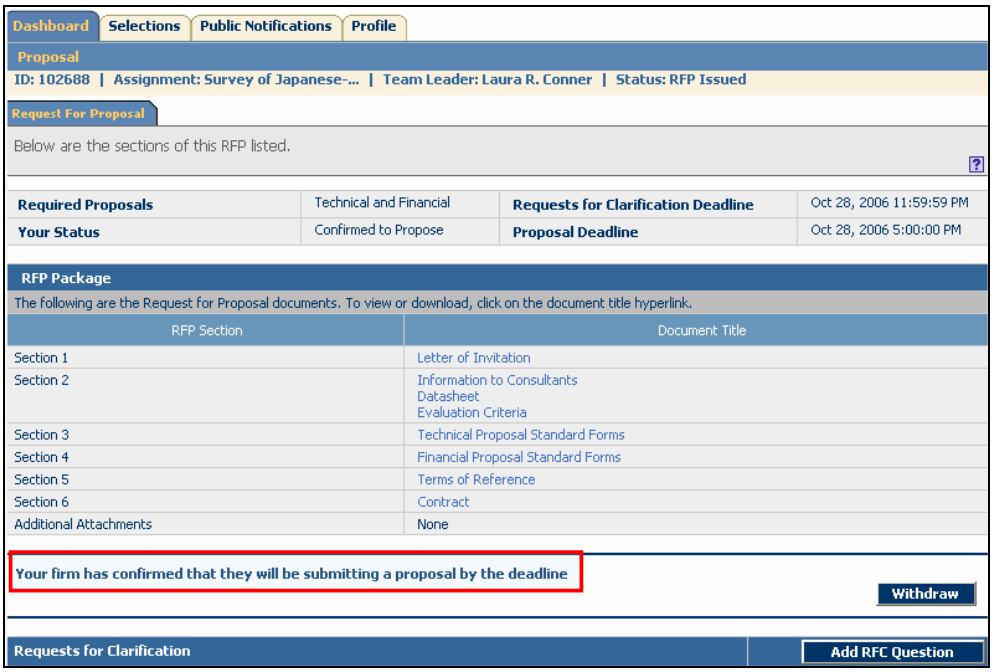

2. Click 

.

3. Navigate to the destination folder and save the document.

4. After you have read all the documents, and if you decide to submit a proposal, click **Confirm to Propose**

   The page is updated and indicates that your firm is confirmed, as shown below.

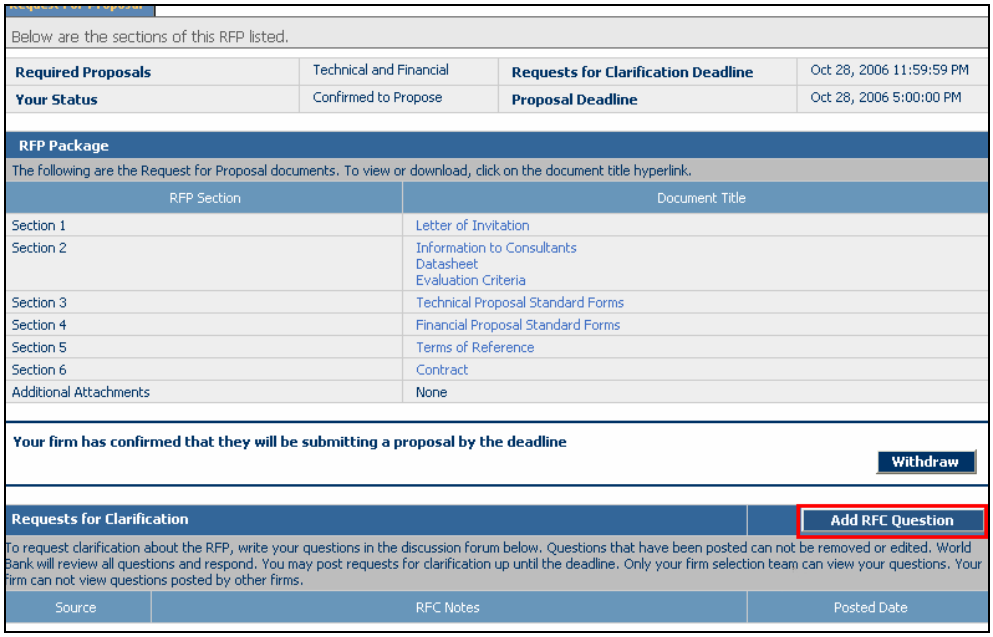



   You now have access to upload proposal documents, and to make Requests for Clarification (RFCs).

**Note:** At any time before proposal deadline you may withdraw your proposal by clicking **Withdraw**.

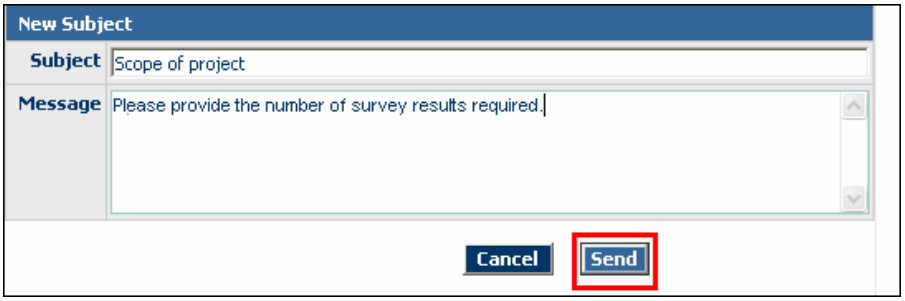
## Submit Request for Clarification (RFC)

You may post requests for clarification on any part of the Request for Proposal. Responses by the World Bank will appear in the Request for Clarification section and will be viewable by all firms. However, the names of the other firms will be hidden. You will receive an email when new responses have been posted.



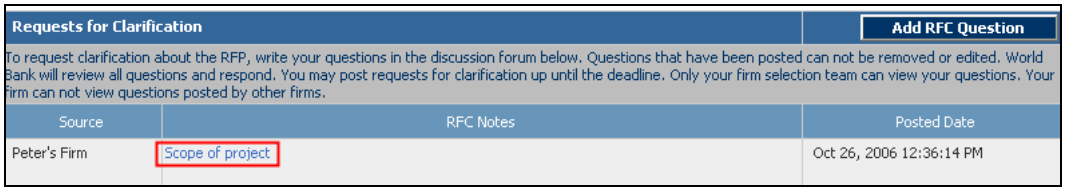

1. To request clarification, click **Add RFC Question**.

   The New Subject dialog box appears.



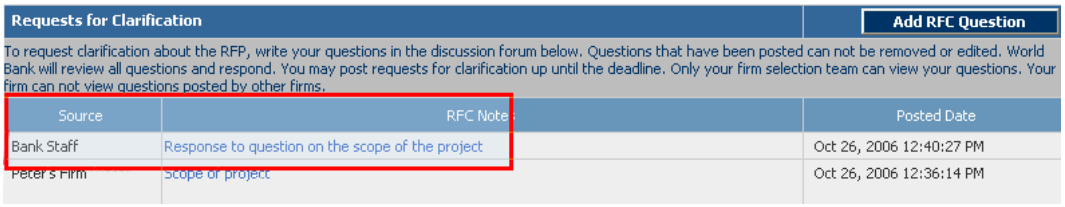

2. Type a subject and your question, then click **Send**.

   The question appears in the Requests for Clarification Section.



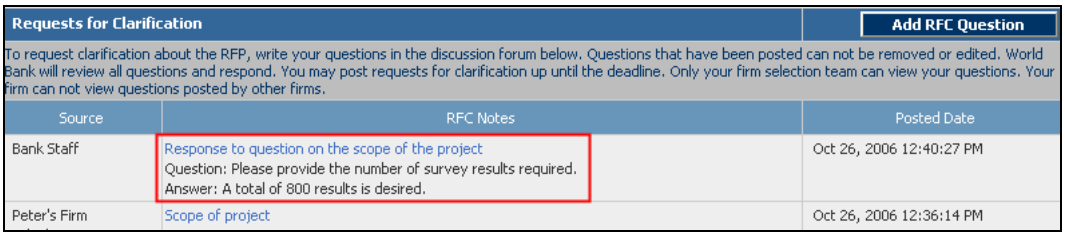
3. To view the question, click the title.

   Responses to questions will also appear in the Requests for Clarification section. You will also receive an email notification that a response has been posted.




4. To view the response, click the title.

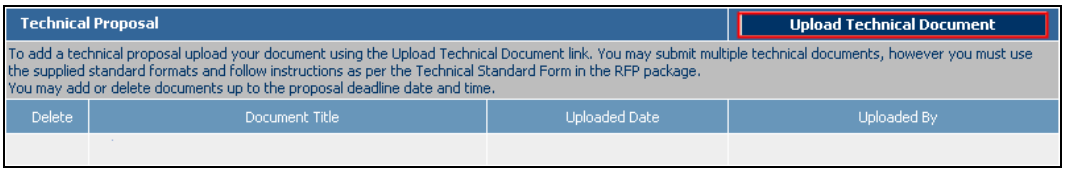
   The response will appear.




## Upload technical and financial proposals

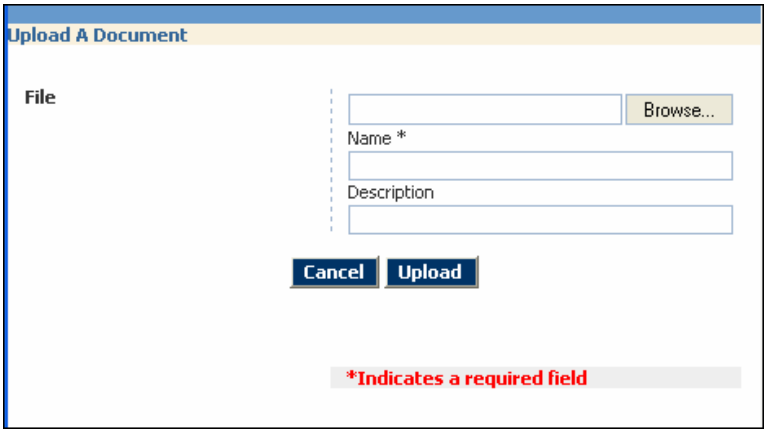
You may add or delete multiple technical proposal documents any time before the proposal deadline. It is important that you follow the instructions.

### *Upload technical document*




1. To upload a technical proposal document, in the Technical Proposal section, click **Upload Technical Document**.

The Upload document dialog box appears.



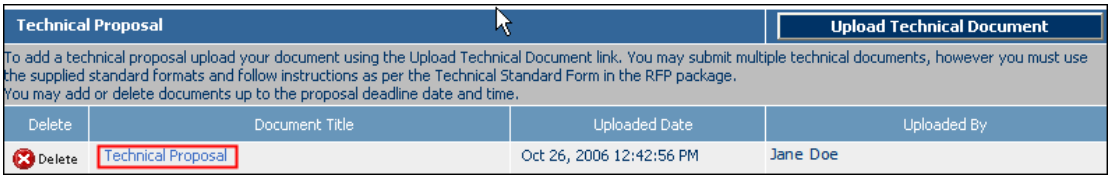

2. Click Browse... to navigate to the file you wish to upload.

   The Name field is automatically populated with your document name. You may change this name if you wish.

3. Enter a description, if desired.

4. Click Upload.

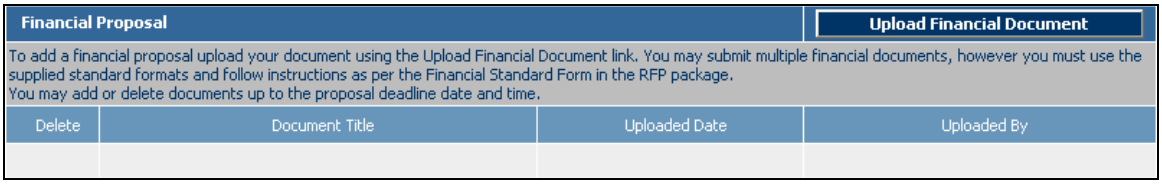
   The document name appears in the Technical Proposal section.




5. To delete a document, click Delete.

### *Upload Financial Proposal*

Depending on the selection method, a financial proposal may also be required. If so, you will see the financial proposal section.




To upload a financial proposal click **Upload Financial Document** and follow the instructions on how to upload a document on page 17.

### *Specify Financial Proposal Amount*

Specify the total cost of your proposal.

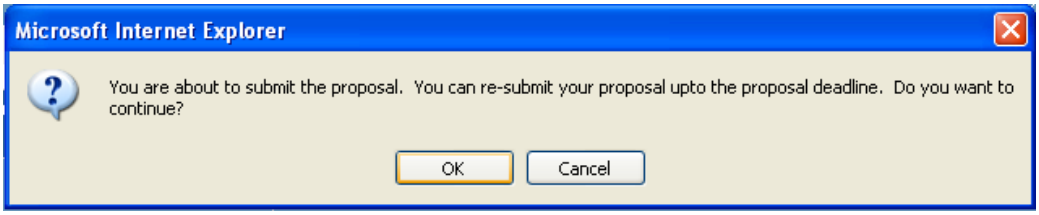
**Note:** Enter the currency amount without symbols or commas.

## Submit proposal

Once your proposal is complete, it is time to submit it to the Bank Group.

1. Click **Submit Proposal**.

   A confirmation message appears.




2. To submit, click OK.

**Note:** You may return at any time before the proposal deadline to make changes and resubmit.

You are automatically returned to the Dashboard page.

Dashboard | Selections | Public Notifications | Profile

This page displays all your pending actions.

Pending Actions

| Selection Number | Selection Name | Project Number | Trust Funds Number | Selection Stage | Role | Tasks |
|---|---|---|---|---|---|---|
| 102689 | Demostration of ECo... | Not Project-Related | | Proposal | Firm Contact | Request For Proposal |
| 102688 | Survey of Japanese-... | P098928 | TF054731 | Proposal | Firm Contact | Request For Proposal |

3. To return to your proposal, click Request For Proposal.

   The Request for Proposal appears again.

Dashboard | Selections | Public Notifications | Profile

Proposal

ID: 102688 | Assignment: Survey of Japanese-... | Team Leader: Laura R. Conner | Status: RFP Issued

Request For Proposal

Below are the sections of this RFP listed.

| | | | |
|---|---|---|---|
| Required Proposals | Technical and Financial | Requests for Clarification Deadline | Oct 28, 2006 11:59:59 PM |
| Your Status | Proposal Submitted | Proposal Deadline | Oct 28, 2006 5:00:00 PM |

RFP Package

The following are the Request for Proposal documents. To view or download, click on the document title hyperlink.

| RFP Section | Document Title |
|---|---|
| Section 1 | Letter of Invitation |
| Section 2 | Information to Consultants<br>Datasheet<br>Evaluation Criteria |
| Section 3 | Technical Proposal Standard Forms |
| Section 4 | Financial Proposal Standard Forms |
| Section 5 | Terms of Reference |
| Section 6 | Contract |
| Additional Attachments | None |

   Your Status now displays Proposal Submitted. You may return to this page at any time to check the status.

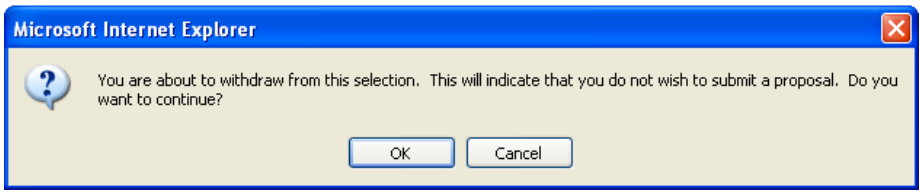
**Note:** Bank staff are prevented from viewing any proposal until the deadline for submission has passed.

## Withdraw a proposal

If you now longer wish to participate in the selection, you may withdraw your proposal.

1. On the Request for Proposal form, click Withdraw.

A confirmation dialog box appears.




2. To withdraw, click OK.

This will remove your proposal from consideration, and your documents will not be viewable by World Bank Group staff.

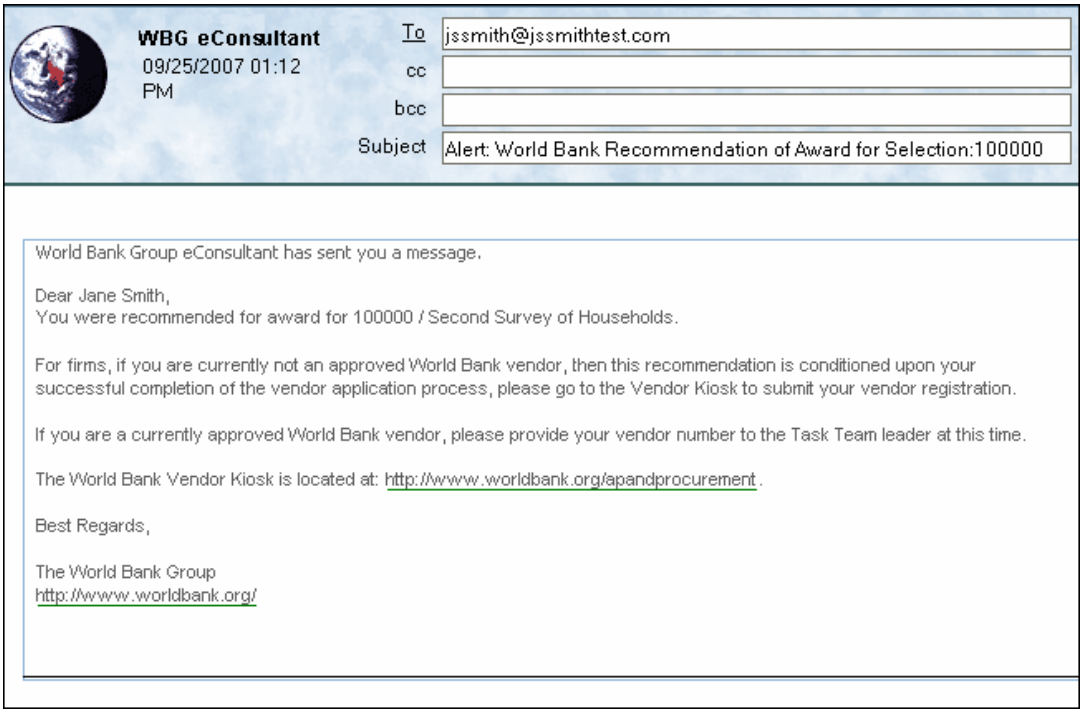
## Evaluation of proposals

Once the deadline has passed, the task team for the selection will review and evaluate the proposals.

When the evaluation period is complete, the task team leader will contact and negotiate with the winning consultant firm. After the completion of negotiations, each firm can view their final status online. In addition, each firm will be sent an email confirmation on the final status of their proposal.

## *Negotiation and Award*

If your proposal is selected by the World Bank Group, you will receive an email containing vendor registration information and a link to WBG eConsultant.



**WBG eConsultant**
09/25/2007 01:12 PM

To: jssmith@jssmithtest.com
cc:
bcc:
Subject: Alert: World Bank Recommendation of Award for Selection:100000

World Bank Group eConsultant has sent you a message.

Dear Jane Smith,
You were recommended for award for 100000 / Second Survey of Households.

For firms, if you are currently not an approved World Bank vendor, then this recommendation is conditioned upon your successful completion of the vendor application process, please go to the Vendor Kiosk to submit your vendor registration.

If you are a currently approved World Bank vendor, please provide your vendor number to the Task Team leader at this time.

The World Bank Vendor Kiosk is located at: http://www.worldbank.org/apandprocurement .

Best Regards,

The World Bank Group
http://www.worldbank.org/

If you are an approved World Bank vendor and have a vendor number, please provide it to the Team Leader.

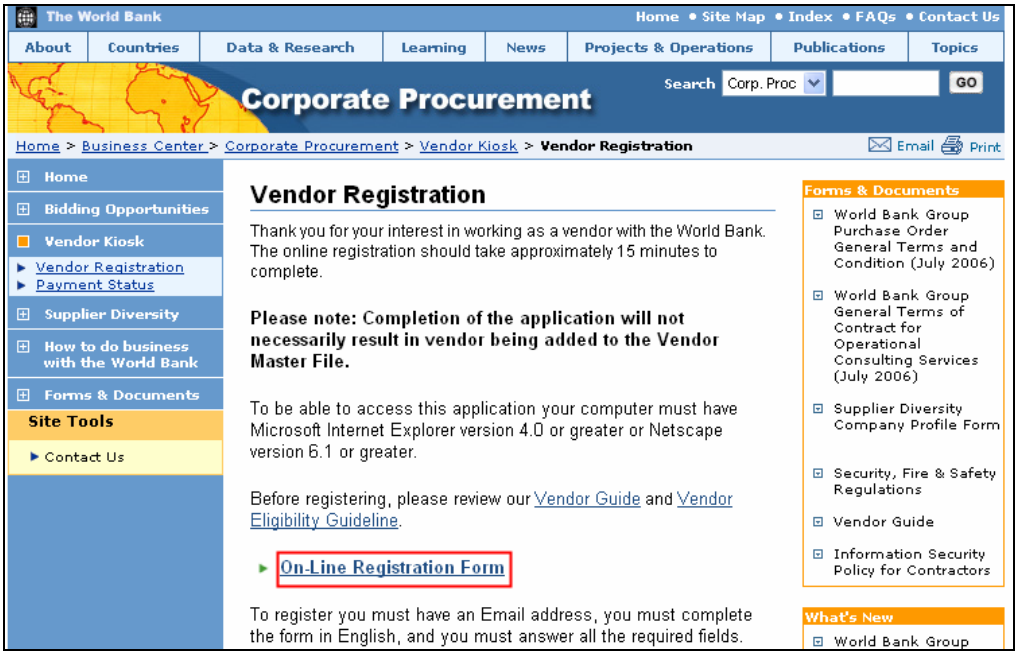
If you are not yet an approved vendor, you must complete a vendor application. You may access the Vendor registration at http://www.worldbank.org/apandprocurement .

1. Click the link for the Vendor Kiosk. http://www.worldbank.org/apandprocurement

The Corporate Procurement page appears.

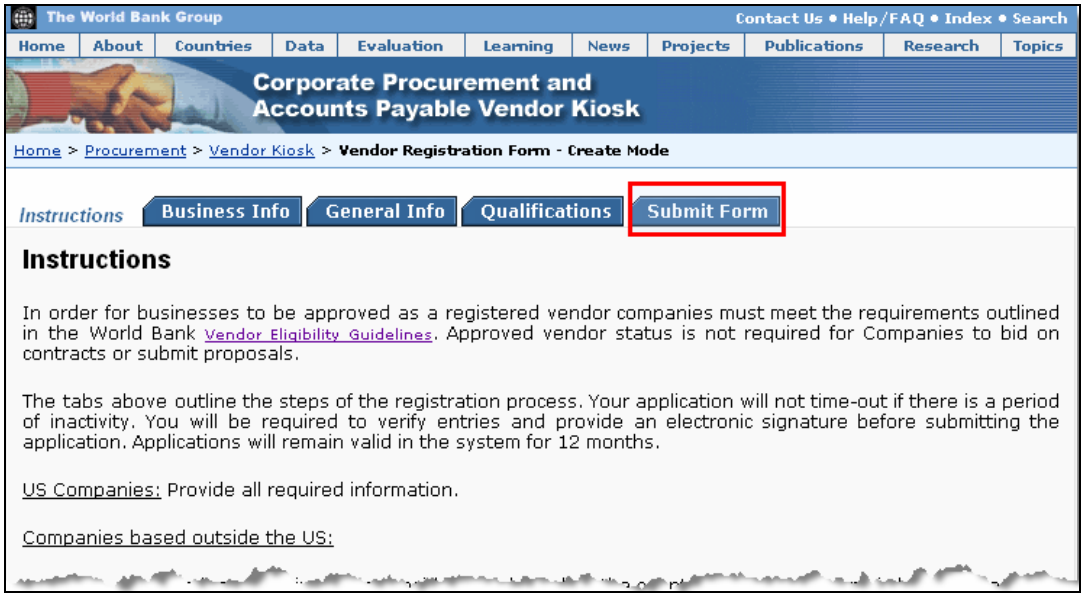

2. Click Vendor Kiosk.

The Vendor Registration page appears.




3. Click On-Line Registration Form.

The Vendor Registration form appears.

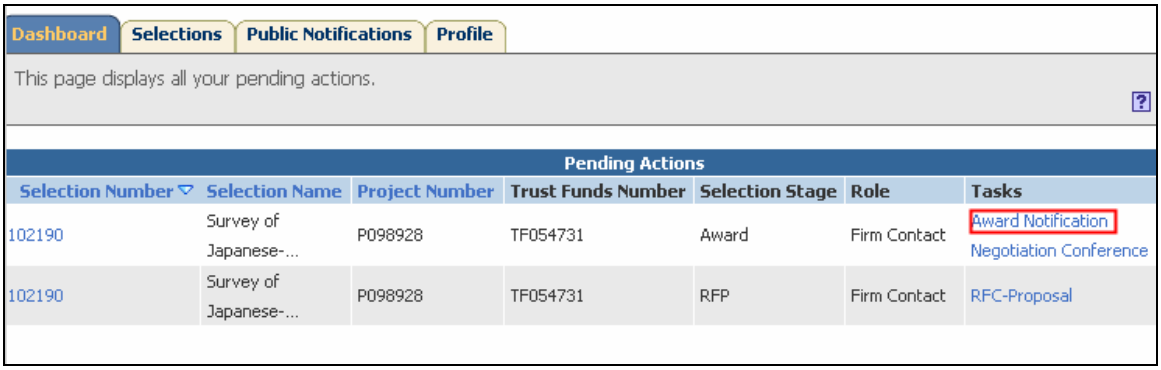



4. Complete the information for each tab, then click **Submit Form**.

5. On the Submit Registration Form tab, click **Submit Form**.

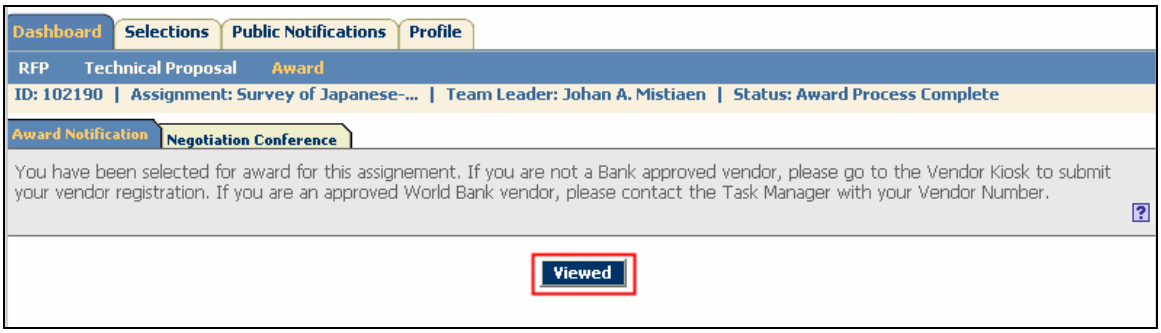

You are returned to the Dashboard page.

On the Dashboard page, you will see the selection in your pending actions with a link to Award Notification.



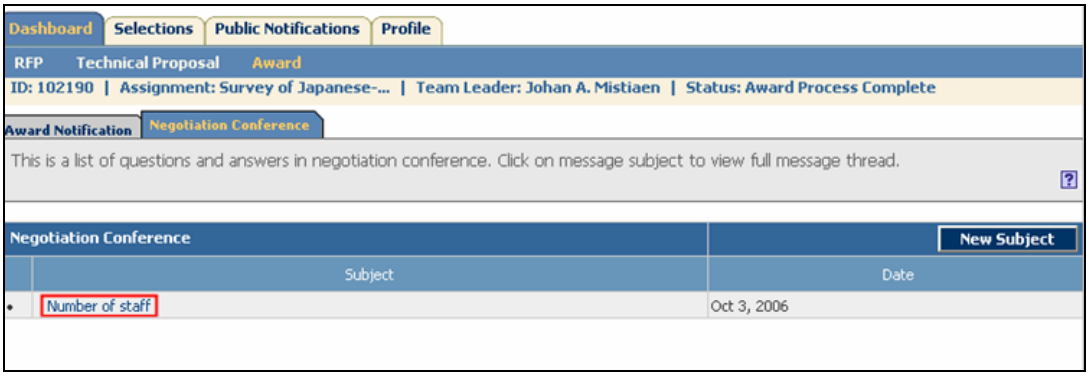

1. Click Award Notification.

   The Award Notification page appears.




2. After reading the message about the award, click Viewed.

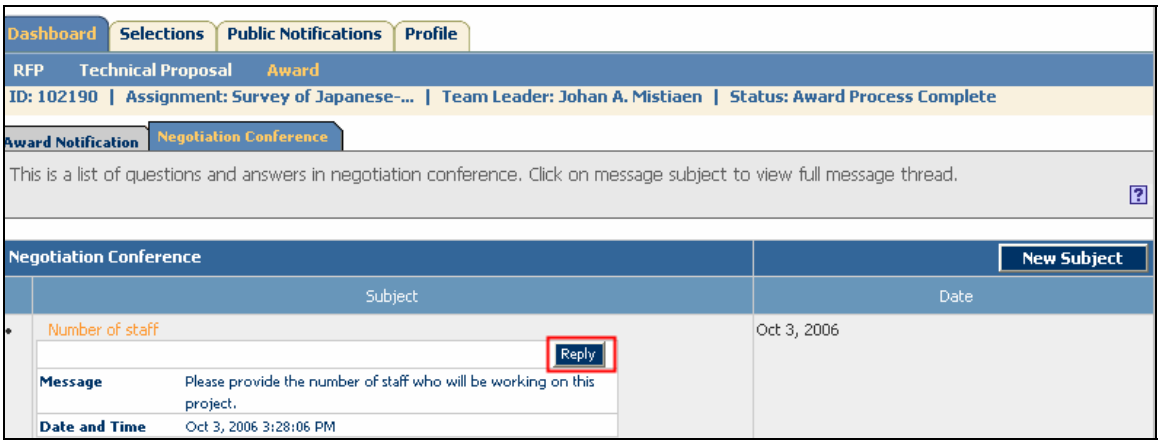
   The Negotiation Conference tab is activated.




Negotiations after the award may either take place offline through email or here in the WBG eConsultant Negotiation Conference.

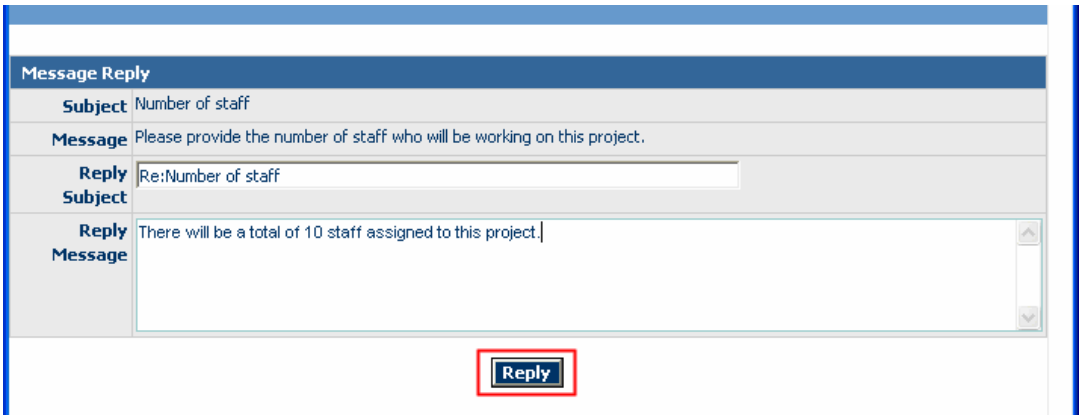
1. To view messages posted by the World Bank, click the subject.

   The body of the message appears.




2. To respond to the message, click Reply.

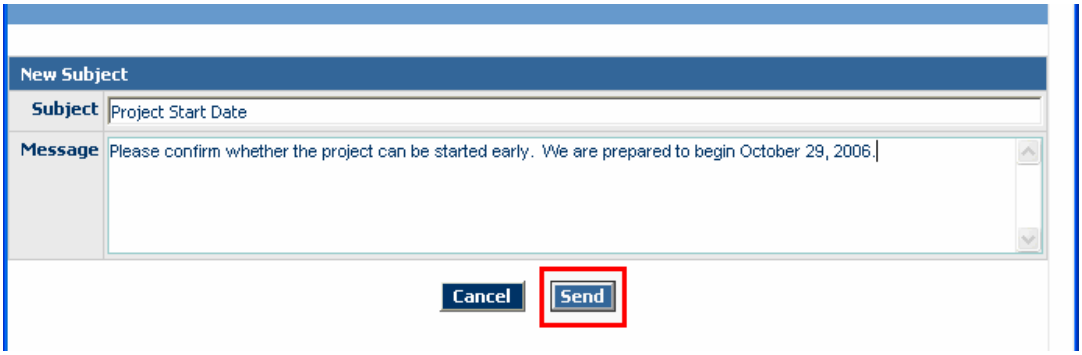
   The Message Reply dialog box appears.




3. Enter your response, then click Reply.

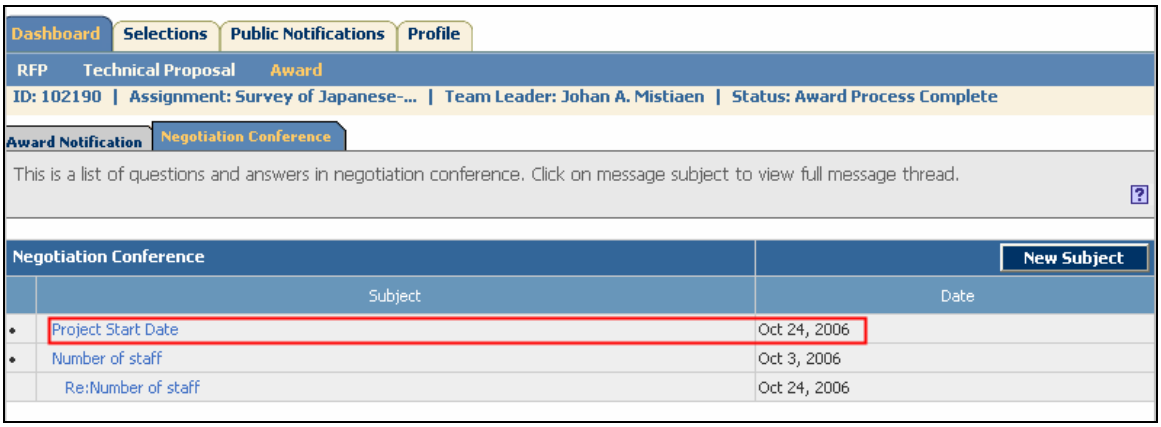
   Your reply appears in the Subject column.

4. To create a new message, click New Subject.




5. Type a subject and your message, then click Send.

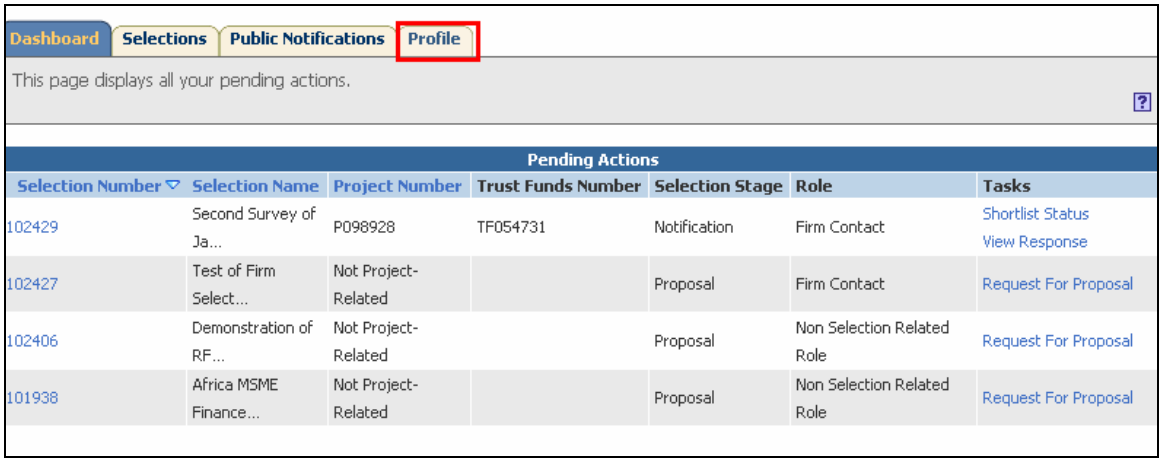
   Your message is now displayed.




After the vendor registration and negotiations are complete, the Task Team Leader will issue a Requisition for services. The World Bank Corporate Procurement office will be in contact with you to finalize the contract.

## *Update selection team information*

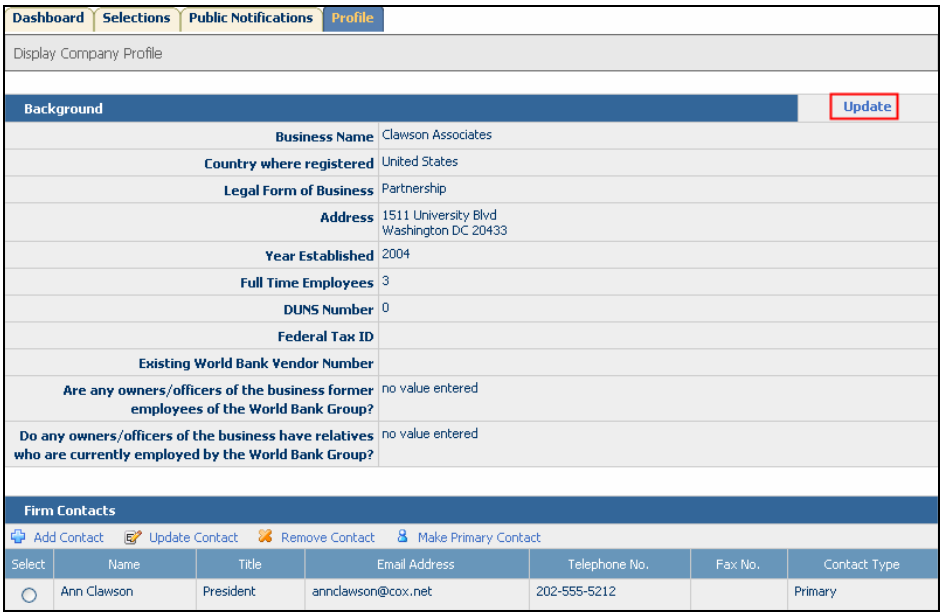
Once you have set up your WBG eConsultant profile, you may want to view or change it. WBG eConsultant provides a simple way to do this.




### *Update Firm Background*

1. From the WBG eConsultant Dashboard page, click **Profile**.

   The Profile page appears.




2. To make a change to your firm's background information, click **Update**.

This opens the form for editing.

Dashboard | Selections | Public Notifications | Profile

Display Company Profile

**Firm Background**

| | |
|---|---|
| Business Name * | Clawson Associates |
| Legal Form of Business * | Partnership |
| Address * | 1511 University Blvd |
| Address 2 | |
| City * | Washington |
| State (mandatory if US) | DC |
| Region | |
| Zip / Postal Code | 20433 |
| Country where registered * | United States |
| Year Established * | 2004 |
| Full Time Employees * | 3 |
| DUNS Number | 0 |
| Federal Tax ID | |
| Existing World Bank Vendor Number | If you are already a World Bank Registered Vendor, please enter your Vendor ID. |
| Are any owners/officers of the business former employees of the World Bank Group? | ○ Yes ○ No |
| Do any owners/officers of the business have relatives who are currently employed by the World Bank Group? | ○ Yes ○ No |

Back | Save

3. Make your changes, then click **Save**.

### *Update Contact information*

1. To update team contact information, scroll down to the Firm Contacts section.

| Background | Update |
|---|---|
| Business Name | Testing Firm M |
| Country where registered | United States |
| Legal Form of Business | Corporation |
| Address | 123 Street<br>City DC |
| Year Established | 2006 |
| Full Time Employees | 20 |
| DUNS Number | 0 |
| Federal Tax ID | 0 |
| Existing World Bank Vendor Number | |
| Are any owners/officers of the business former employees of the World Bank Group? | No |
| Do any owners/officers of the business have relatives who are currently employed by the World Bank Group? | No |

Firm Contacts

Add Contact | Update Contact | Remove Contact | Make Primary Contact

| Select | Name | Title | Email Address | Telephone No. | Fax No. | Contact Type |
|---|---|---|---|---|---|---|
| ○ | Jen Doe | | jendoe@thejkgroup.com | | | Primary |
| ○ | First Last | 0 | firstlast@thejkgroup.com | | | Secondary |
| ○ | Derrik Wilson | Vice President, Product Development | dwilson@firmone.com | 202 587 6313 | | Secondary |
| ○ | Schuyler Pratt | Director, New Products | spratt@firstlast.com | 123-456-7890 | | Secondary |
| ○ | Ann Clawson | Vice President | aclawson@firmh.com | 775-253-7931 | | Secondary |

2. To add a contact, click Add Contact.

   The Add Secondary Contacts screen appears.

Dashboard | Selections | Public Notifications | Profile

Display Company Profile

Add Secondary Contacts

| | |
|---|---|
| First Name * | |
| Last Name * | |
| Title | |
| Telephone Number | |
| Fax Number | |
| Email Address * | |

Back | Submit

3. Enter the information for your new contact and click Submit.

The new contact is added.

**Firm Contacts**

Add Contact | Update Contact | Remove Contact | Make Primary Contact

| Select | Name | Title | Email Address | Telephone No. | Contact Type |
|---|---|---|---|---|---|
| ○ | Ann Clawson | President | annclawson@cox.net | 202-555-5212 | Primary |
| ○ | Jane Forey | Dr. | jforey@cox.net | 202 554 5212 | Secondary |

4. To update contact information, select the contact and click Update Contact.
5. Make your changes and click **Submit**.
6. To remove a contact, select the contact and click Remove Contact.
7. At the warning, click OK.
8. To change a secondary contact to the primary, select the contact and click Make Primary Contact.

If you need additional assistance, please contact the World Bank Group's Global Support Center by sending an email to wbgeconsultant@worldbank.org.