PUBLIC PROCUREMENT SERVICE

e-Sourcing

eTendersNI

ECONOMIC OPERATORS
USER MANUAL

EUROPEAN DYNAMICS S.A.

EUROPEAN DYNAMICS

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Acronyms / Abbreviations

Acronym / Abbreviation	Explanation
CA	Contracting Authority
CAPC	Contracting Authority Procurement Coordinator
CAPCA	Contracting Authority Procurement Coordinator Assistant
CAPO	Contracting Authority Procurement Officer
CfT	Call for Tender
CPV	Common Procurement Vocabulary
EO	Economic Operator (supplier)
EO Admin	Economic Operator (supplier) Administrator
EO User	Economic Operator (supplier) User
FA	Framework Agreement
MEAT	Most Economically Advantageous Tender
NUTS	Nomenclature of Territorial Units for Statistics
PDF	Portable Document File
PIN	Prior Information Notice
PO	Procurement Officer
PO/ES	Procurement Officer Evaluation Staff
PO/ESR	Procurement Officer Evaluation Staff Responsible
PO/OS	Procurement Officer Opening Staff
PO/TC	Procurement Officer Tender Coordinator
SA	System Administrator
SC	Specific Contract (in the context of an FA or DPS)
WS	Workspace
XML	eXtended Markup Language

1. eTendersNI workflow

The following terms are widely used within the eTendersNI platform:

- **Tender Package** is the supplier's response (i.e. offer) in a Call for Tender (e.g. CfT)
- **Timestamp** is a marking of the time and date on which the tender was uploaded in the system. Similar timestamp is used when a bid is submitted during an e-Auction event
- **Bid** corresponds to an offer submitted during an e-Auction event

The following deadlines are widely used within the system:

- **Time-limit for receipt of tenders or requests to participate (mandatory):** Deadline for the Economic Operators to upload their tender
- **Request for clarification From (mandatory):** The starting date of the clarification forum on which suppliers can ask for further clarifications
- **Request for clarification To (Mandatory):** The final date of the clarification forum on which suppliers can ask for further clarifications
- **Tenders Opening Date (optional):** The date for unlocking the received tenders. This date is set by default to be after the time-limit for receipt of tenders

The following figures provides a description of the workflow the Contracting Authority and Economic Operators users follow to complete a procurement process.

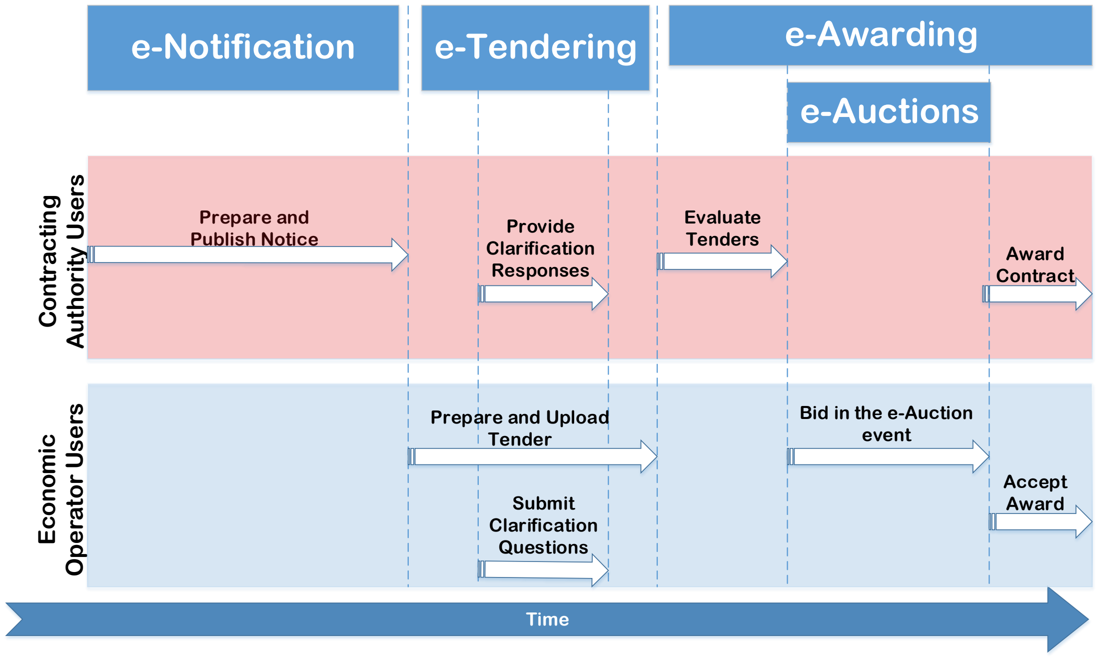


Figure 1: Workflow of Contracting Authority and Economic Users

2. General Functionality

2.1. General usage guidelines

The eTendersNI platform provides the following common navigation behaviour/functionality:

- Tabular display: Any data displayed in tabular format will have the following header which helps the user to navigate

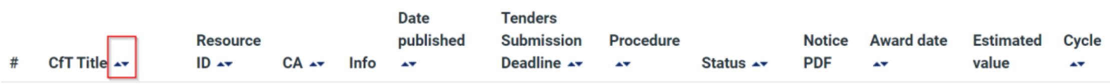


Figure 2: Example of a table header

- The arrows are used for sorting the results in ascending or descending order according to the field selected. The button is used to hide/ show a number of fields in the table.
- Any search query or list, with more than a page of results, will include the following navigation buttons:
    - First Page
    - Last Page
    - Previous Page
    - Next Page

- The following buttons are also widely used within eTendersNI:
    - **Calendar Button** - Opens a calendar that enables the user to select a date
    - **Search Button** - Opens a window with search engine enabling the user to search for various codes (e.g. CPV and NUTS codes)
    - **Clear Button** - Clears the previous selection of the user

2.2. The Show CfT Menu functionality

During the creation, editing and uploading of a Call for Tender (e.g. CfT), the "Show CfT Menu" displays all functionalities available to the user. The "Show CfT Menu" is collapsed by default:

Figure 3: The Show CfT Menu (collapsed)

If the user selects the "**Show CfT Menu**" button, the Call for Tender menu will be expanded to show all available functionalities. The user can select any of the provided functionalities:

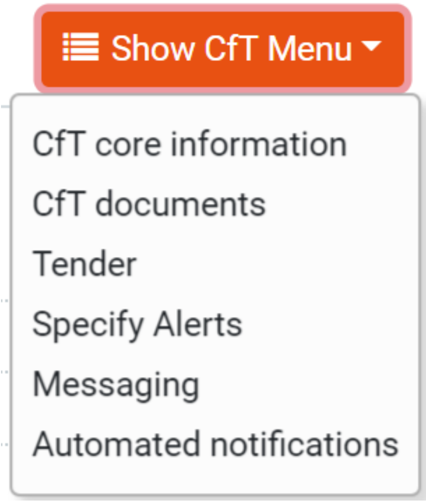


Figure 4: The Show CfT Menu (expanded)

The "Show CfT Menu" will collapse through clicking on the "**Show CfT Menu**" button again.

2.3. eTendersNI Main Page

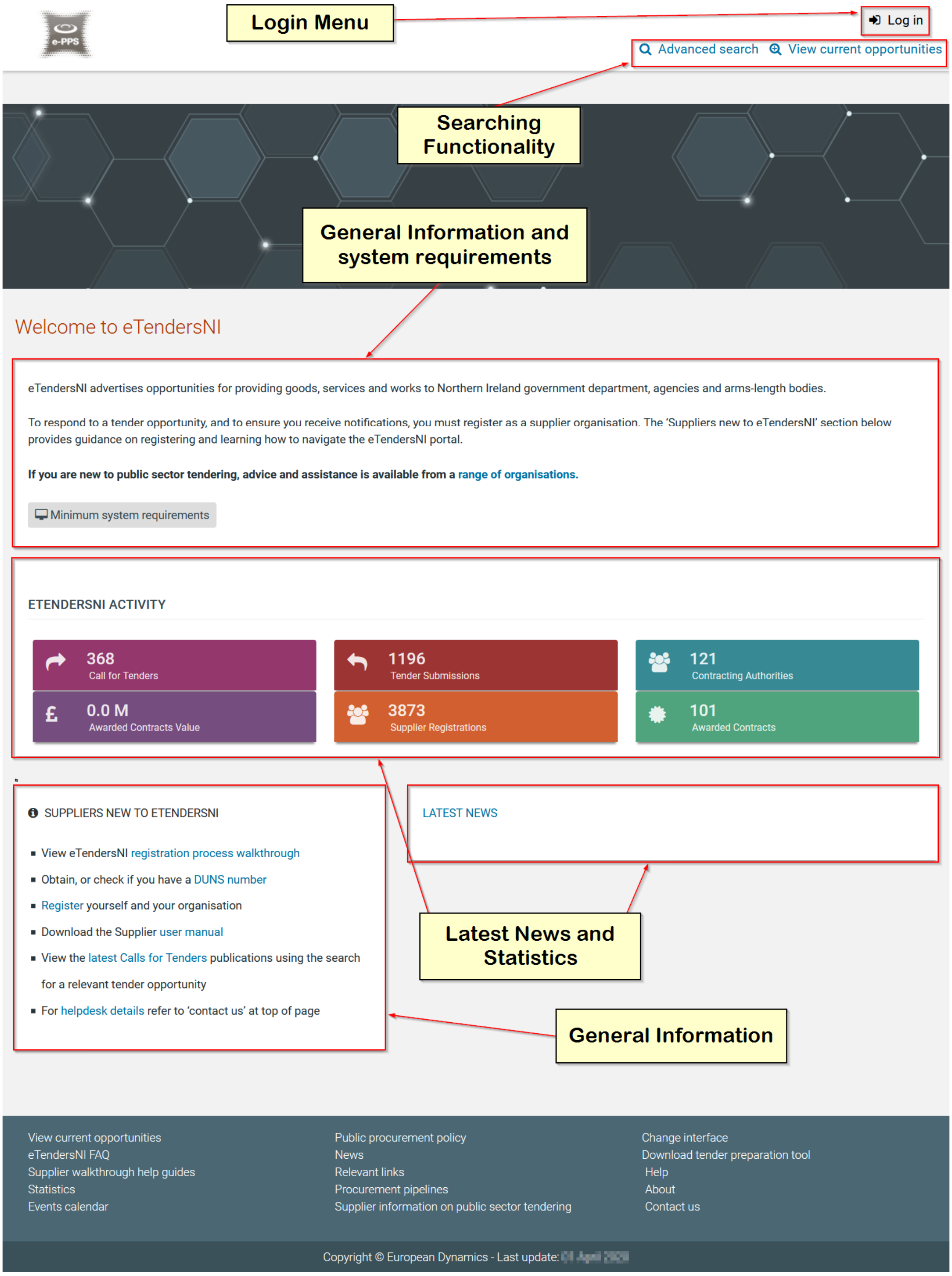


Figure 5: Main eTendersNI page

The main page of the eTendersNI platform consists of the following elements:

- **Top right corner**, which contains the Login menu and the searching functionality
- **Central column,** which contains general information regarding the system and the system requirements. Furthermore, it lists any uploaded news and also statistical information about the system usage. Finally, the functionality for the registration of Economic Operators within the system is provided.
- **Static footer** of the main page which provides functionalities accessible from all pages of eTendersNI.

The fundamental sections of the main page are further described in the following pages.

2.3.1. Login Section

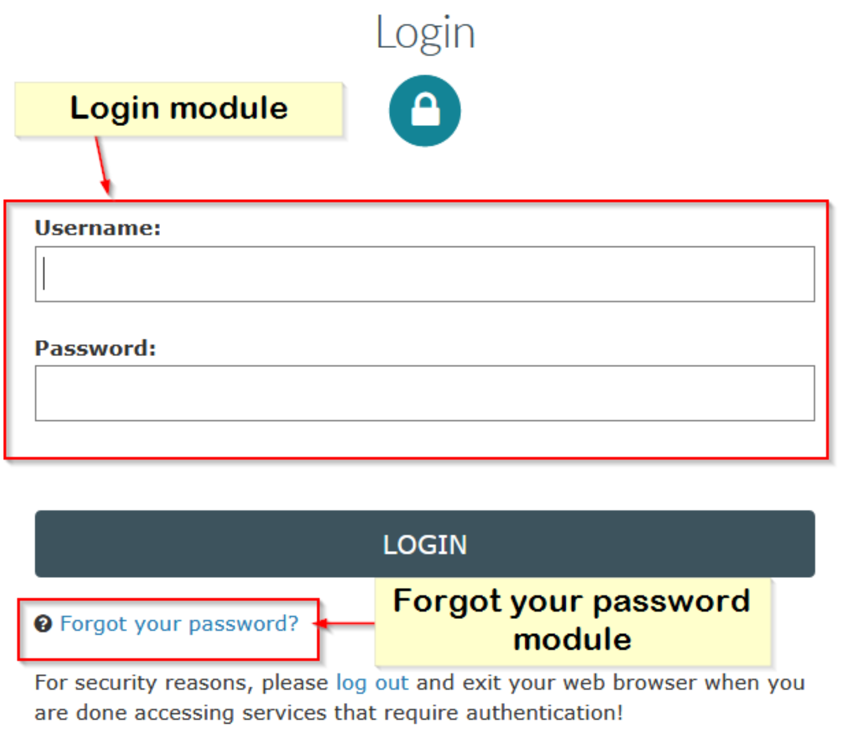


Figure 6: Login panel

The Login Panel enables all users (Contracting Authority, Economic Operators and System Administrators) to log into the system provided they possess valid credentials (username and password). Also, functionality for recovering a user’s password is provided.

2.3.2. Search Section

Figure 7: Main search panel

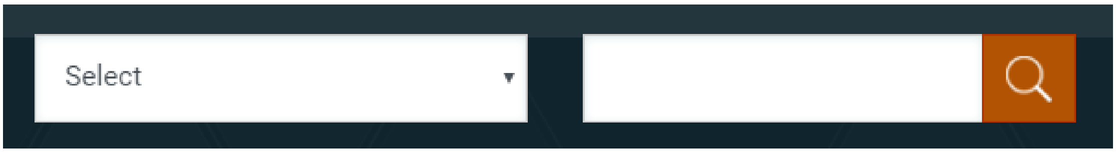


Figure 8: Simple search panel

The users can access this section to search for Call for Tenders, Organisations and users. Advanced searching functionality, (by selecting the button) is also provided.

3. User authentication and organisation management

3.1. Registration of Economic Operator

<u>Important notice:</u> only suppliers with a valid DUNS number may register their companies on the system. The suppliers that do not have such DUNS number should contact the System Administrator. Contact details are provided in the "contact us" section.

The supplier with a valid DUNS number clicks on the "Register as a Supplier" functionality (available on the public page), provides their DUNS number and clicks on the "**Retrive company data from D&B to proceed**" button.

Figure 9: Retrieve company data from D&B to proceed

If the DUNS number is valid, the service automatically obtains all information about the company.

The supplier additionally should provide at least all mandatory information, and click on the "**VALIDATE & CONTINUE**" button.

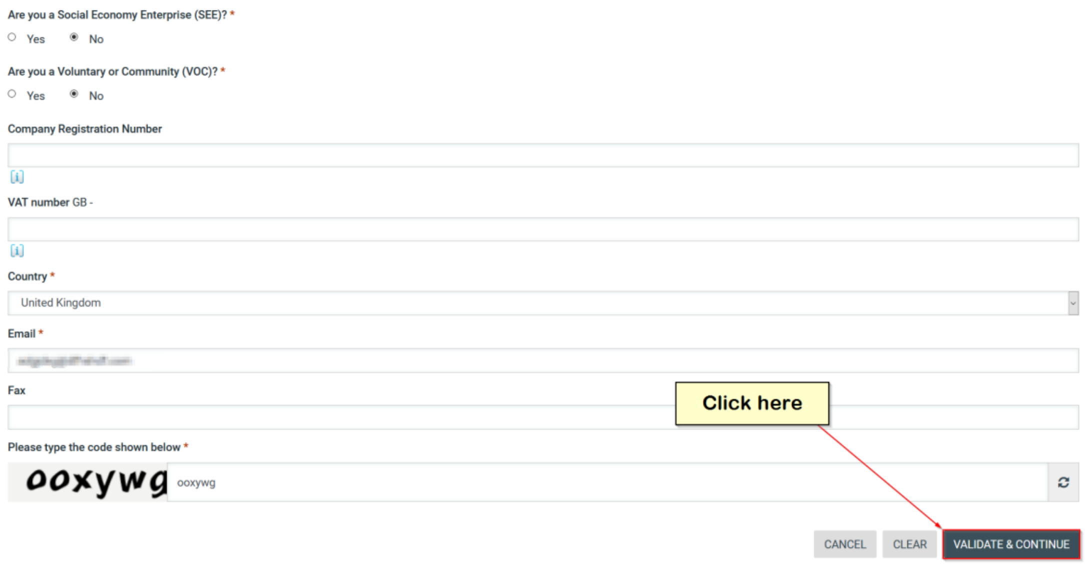


Figure 10: EO Organisation Registration

In the next step, the supplier has to provide the details of the Economic Operator Administrator by providing at least all the mandatory fields.

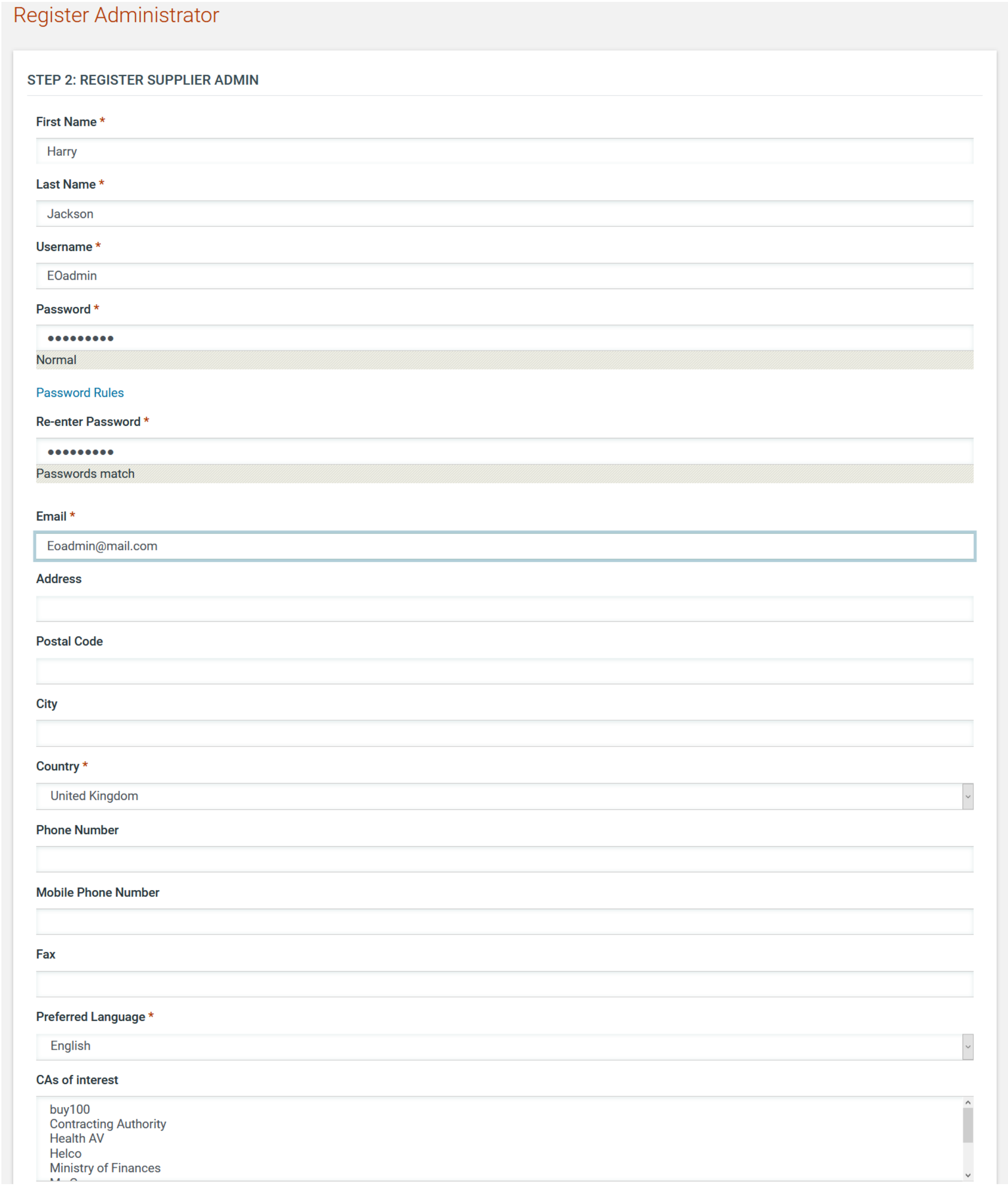


Figure 11: Register Economic Organisation Administrator

The supplier clicks on the “**FINISH**” button to finalise the procedure, but should be aware that **the registration still needs to be confirmed and approved by the System Administrator**.

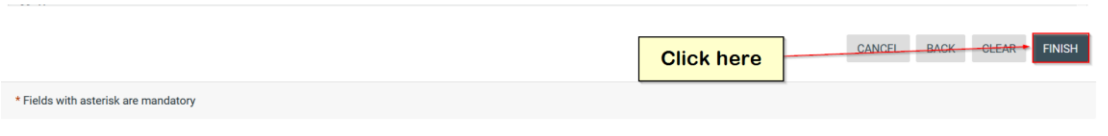


Figure 12: Finalise registration

3.2. Log in the platform

In order for a user to log into the service, s/he should click on the "Log in" button and provide her/his credentials in the login section.

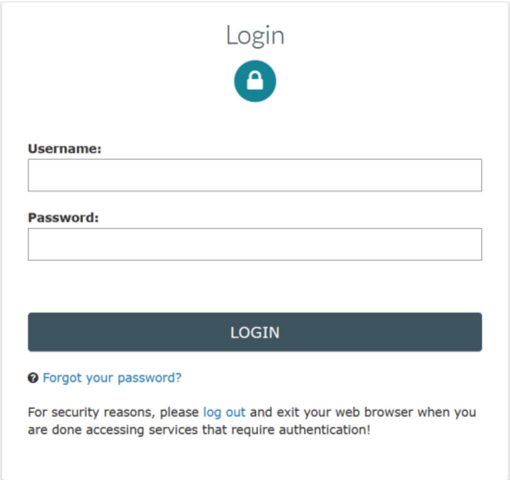


Figure 13: Login module

If a user provides incorrect credentials (either user name or password) an error message will be displayed

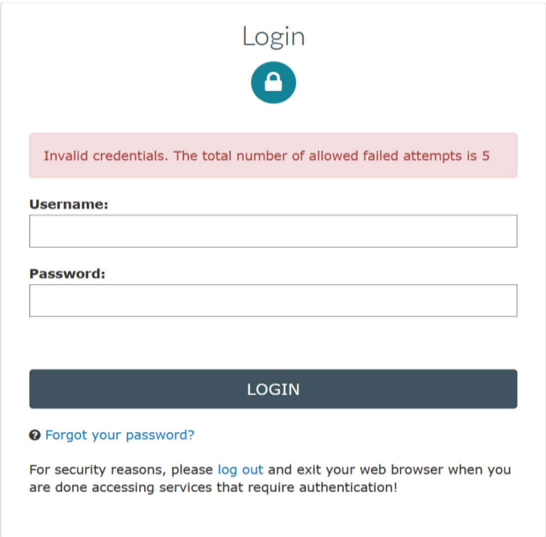
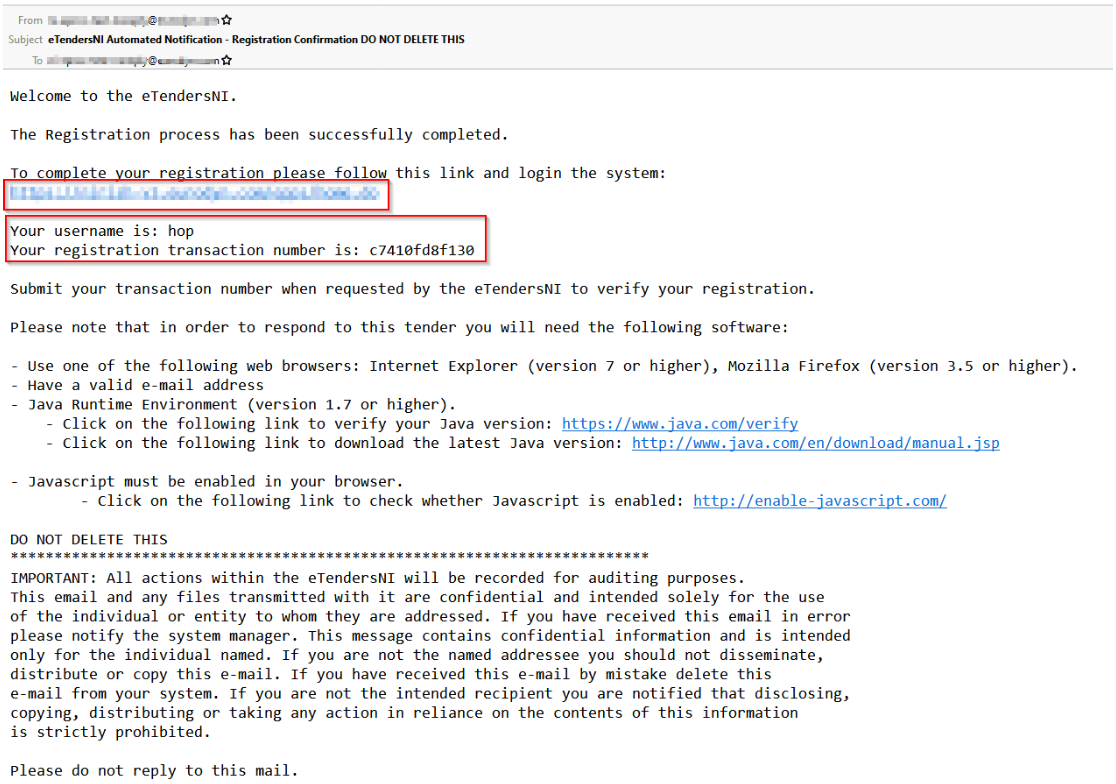


Figure 14: Wrong credentials

If a user provides an incorrect password for a username more than 5 times, the user account will automatically get de-activated. In this case, the user should contact the System Administrator to re-activate the account.

3.3. Log into the platform for the first time

When a user logs in the eTendersNI for the first time, as a first step, the user will have to provide the transaction number (which is received by email after his successful registration on the platform).


From
Subject eTendersNI Automated Notification - Registration Confirmation DO NOT DELETE THIS
To

Welcome to the eTendersNI.

The Registration process has been successfully completed.

To complete your registration please follow this link and login the system:

Your username is: hop
Your registration transaction number is: c7410fd8f130

Submit your transaction number when requested by the eTendersNI to verify your registration.

Please note that in order to respond to this tender you will need the following software:

- Use one of the following web browsers: Internet Explorer (version 7 or higher), Mozilla Firefox (version 3.5 or higher).
- Have a valid e-mail address
- Java Runtime Environment (version 1.7 or higher).
  - Click on the following link to verify your Java version: https://www.java.com/verify
  - Click on the following link to download the latest Java version: http://www.java.com/en/download/manual.jsp

- Javascript must be enabled in your browser.
  - Click on the following link to check whether Javascript is enabled: http://enable-javascript.com/

DO NOT DELETE THIS
****
IMPORTANT: All actions within the eTendersNI will be recorded for auditing purposes.
This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you have received this email in error please notify the system manager. This message contains confidential information and is intended only for the individual named. If you are not the named addressee you should not disseminate, distribute or copy this e-mail. If you have received this e-mail by mistake delete this e-mail from your system. If you are not the intended recipient you are notified that disclosing, copying, distributing or taking any action in reliance on the contents of this information is strictly prohibited.

Please do not reply to this mail.

Figure 15: Confirmation email received during registration

1. After providing his user credentials the user is requested to provide the transaction number received during the registration:

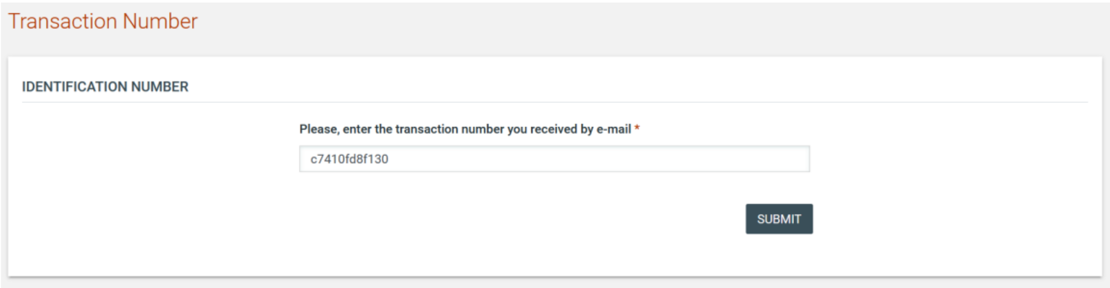


Figure 16: Provision of the transaction number

2. Next, the user is prompted to read and accept the following System User Agreement:

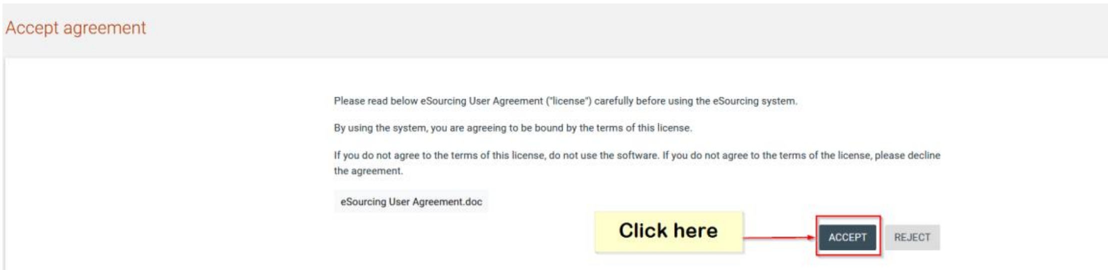


Figure 17: Confirmation of the user agreement

3. Finally, the user is prompted to navigate to their homepage

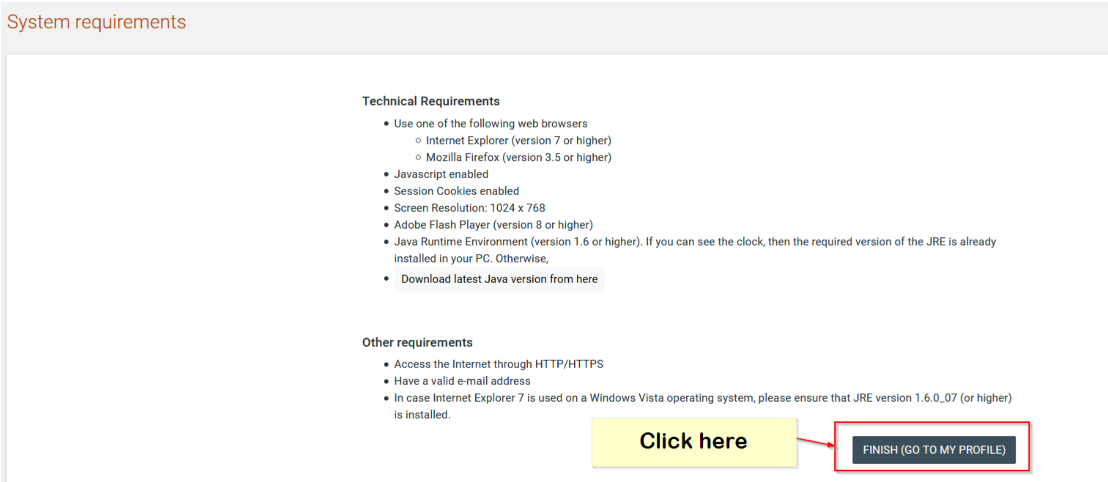


Figure 18: Navigation to user's Homepage

3.4. Password recovery

The user can recover his password through the "**Forgot your password**" functionality available from the login module. To trigger the password reset functionality, the system requires the user to provide his/her <u>username</u> in the following screen

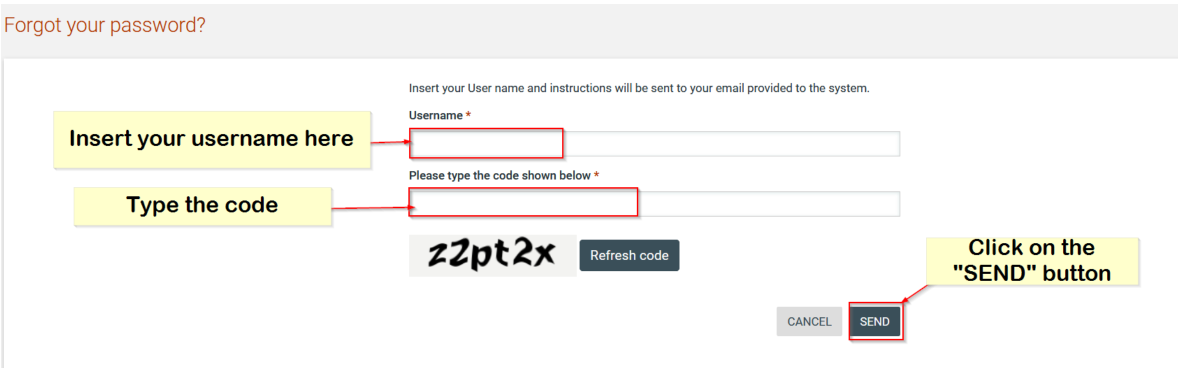
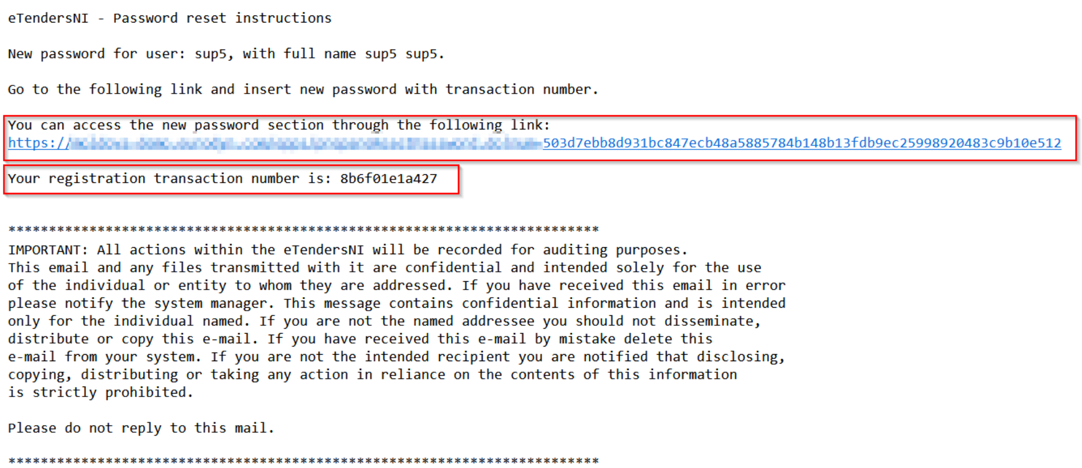


Figure 19: The user inserts his username

If the provided <u>username</u> is valid and the user has provided the security code correctly, the system sends an email to the associated address, containing a transaction number and a unique generated access link.



eTendersNI - Password reset instructions

New password for user: sup5, with full name sup5 sup5.

Go to the following link and insert new password with transaction number.

You can access the new password section through the following link:
https://[illegible]503d7ebb8d931bc847ecb48a5885784b148b13fdb9ec25998920483c9b10e512

Your registration transaction number is: 8b6f01e1a427

****
IMPORTANT: All actions within the eTendersNI will be recorded for auditing purposes.
This email and any files transmitted with it are confidential and intended solely for the use
of the individual or entity to whom they are addressed. If you have received this email in error
please notify the system manager. This message contains confidential information and is intended
only for the individual named. If you are not the named addressee you should not disseminate,
distribute or copy this e-mail. If you have received this e-mail by mistake delete this
e-mail from your system. If you are not the intended recipient you are notified that disclosing,
copying, distributing or taking any action in reliance on the contents of this information
is strictly prohibited.

Please do not reply to this mail.

****

Figure 20: The system sends an email containing a registration transaction number as well as a unique access link

In order to reset the password, the user accesses the provided link and populates the new password as well as the received transaction number

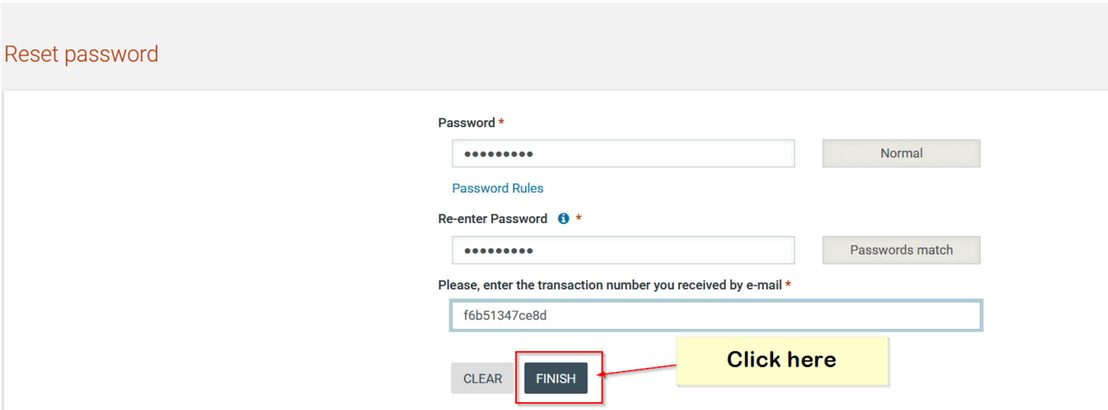


Figure 21: Resetting the password

3.5. Log out from the platform

The user can exit eTendersNI service though clicking on the "**Logout**" button. Through this action, the user logs out from all eTendersNI services (i.e. invalidates his/her single sign-on authentication).

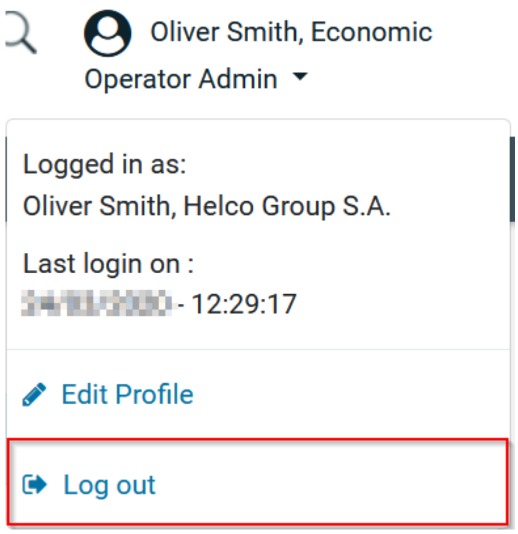


Figure 22: Logout

3.6. Maintenance of user's profile

Following their successful authentication, the user may edit their profile by activating option “**Edit Profile**” accessible through clicking on the user's details on the top-right corner.

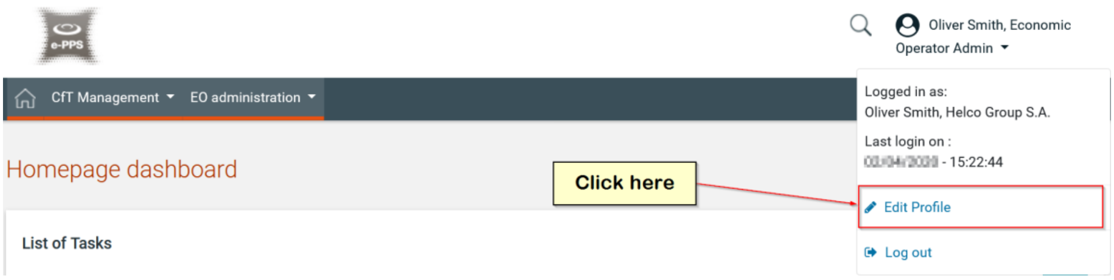


Figure 23: Edit profile option

The user can update the information fields and then, click on the “**SAVE**” button to store the performed modifications. In case the user's password expires or invalidates, the user will be directed to the “Edit Account” page upon his login in order for him to provide a new password. In case the user does not provide a new password, he will not be able to have full access to eTendersNI services, e.g. access to “View Tenders” page.

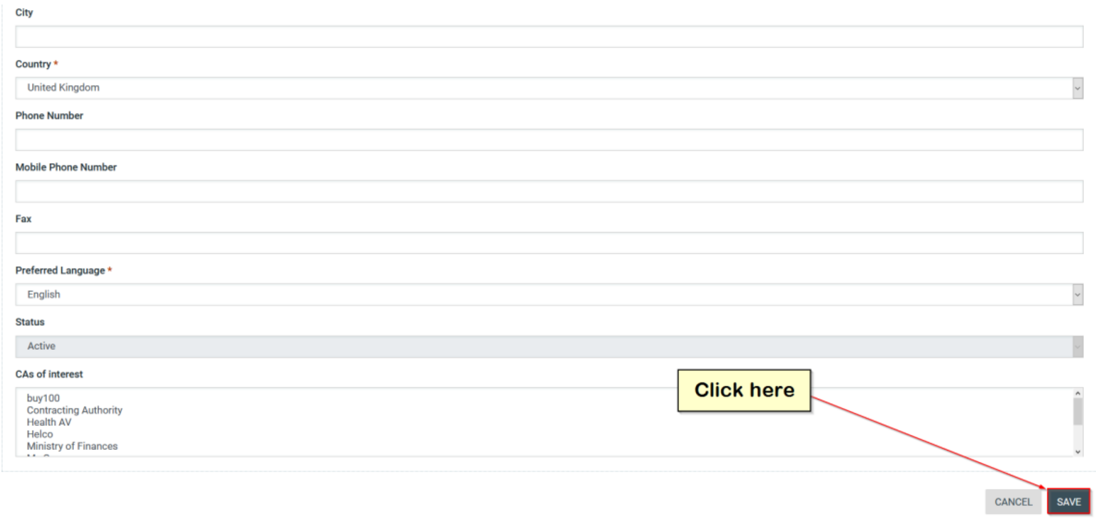


Figure 24: Edit user's details

The password should follow a specific configuration. To view the password rules the user should click on the "**Password Rules**" link.

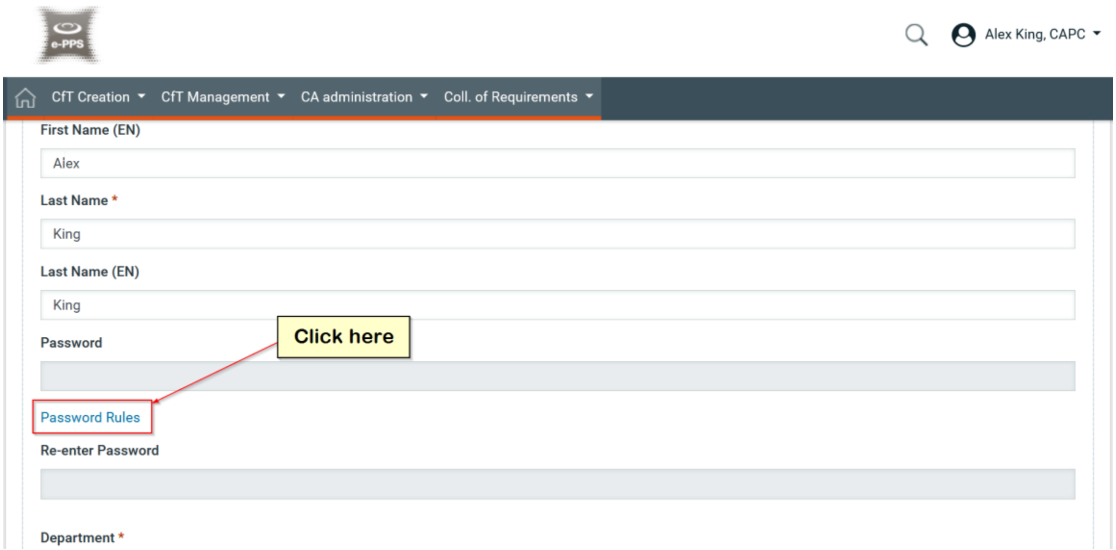


Figure 25: Password rules link

The password configuration rules consist of:

- Letters (upper case/lower case) allowed to be used
- Numbers allowed to be used
- Characters allowed to be used
- Allowed login failures
- Password lifetime
- Password length (min/max)
- Password history

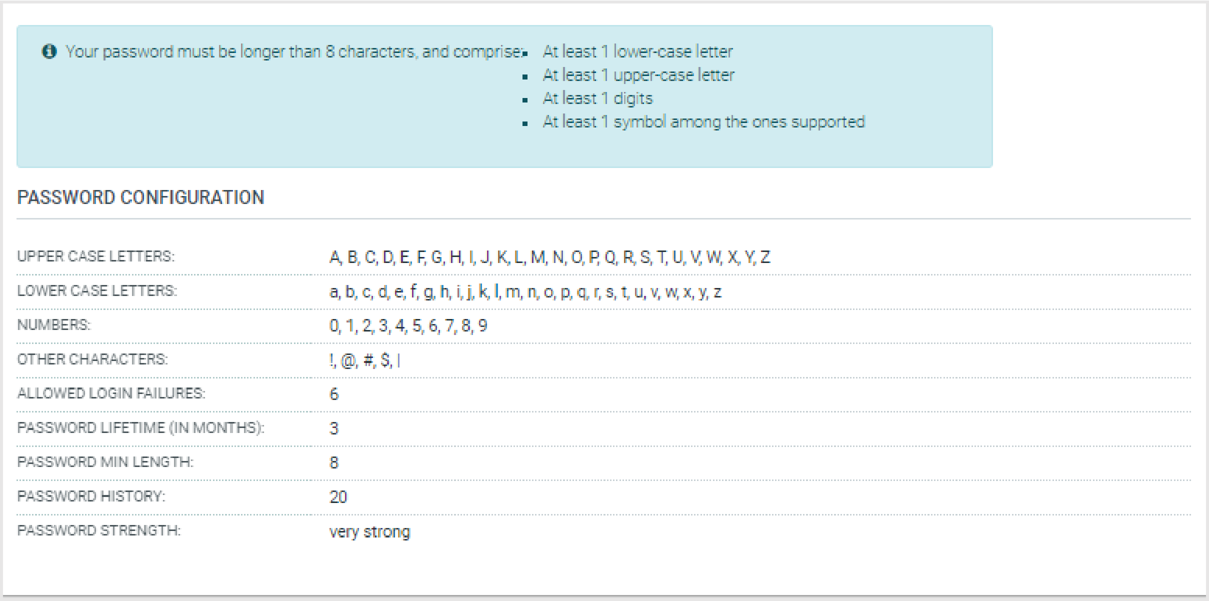


Figure 26: Password configuration rules

In case the password does not follow at least one password configuration the following message appears

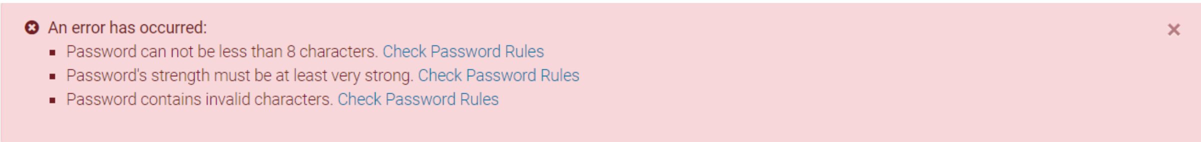


Figure 27: Change password error message

3.7. Organisation management

The Users assigned with the “Economic Operator Organisation Administrator” role can perform the following activities for the management of their organisation:

- Edit organisation details
- View the users registered within the organisation of the Economic Operator
- Add new users in the organisation of the Economic Operator
- Edit user’s details

This management functionality is provided through the “**EO Management**” option of the “**EO Administration**” menu:

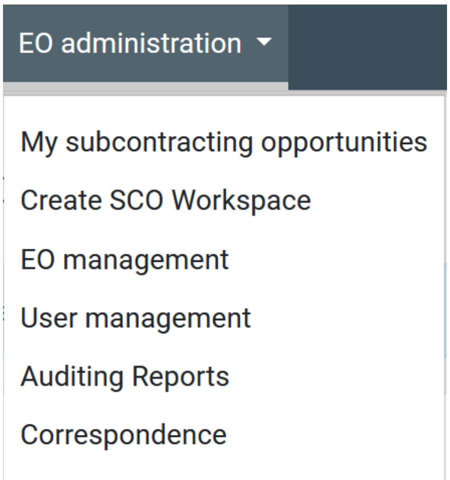


Figure 28: EO Administration Menu

The system displays the organisation details in "Read only" format.

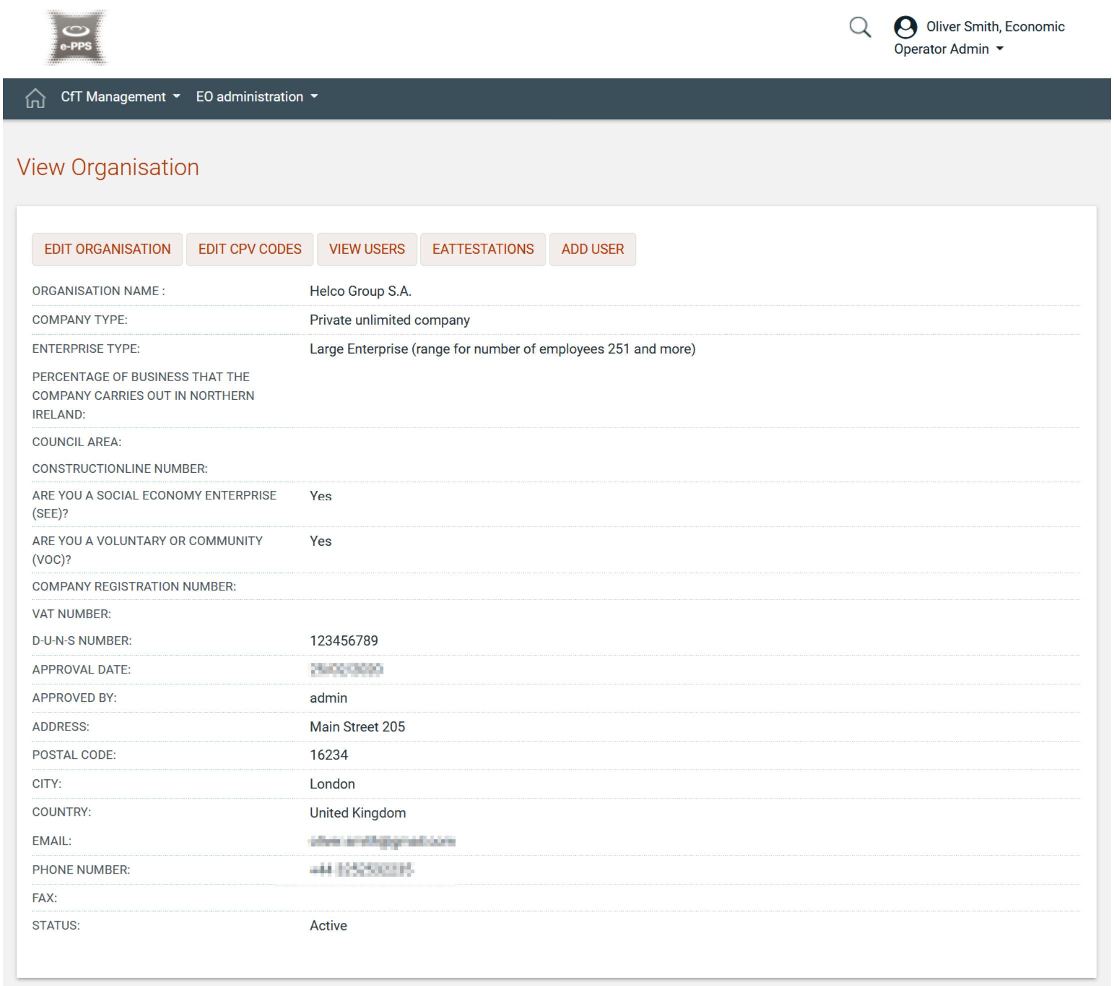


Figure 29: EO Management page

3.7.1. Edit organisation details

Selecting the option “**EDIT ORGANISATION**” allows the user to edit the organisation’s details

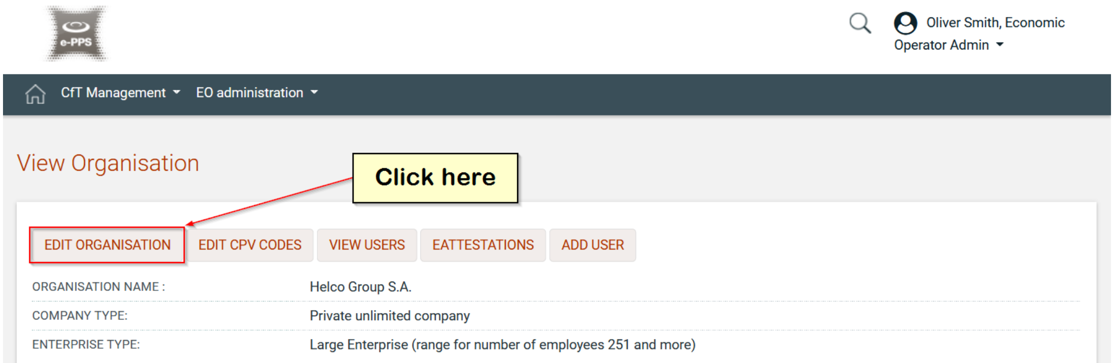


Figure 30: Edit organisation button

Selecting the button “**SAVE**” will store the performed modifications, while the button “**CLEAR**” will reset the performed modifications.

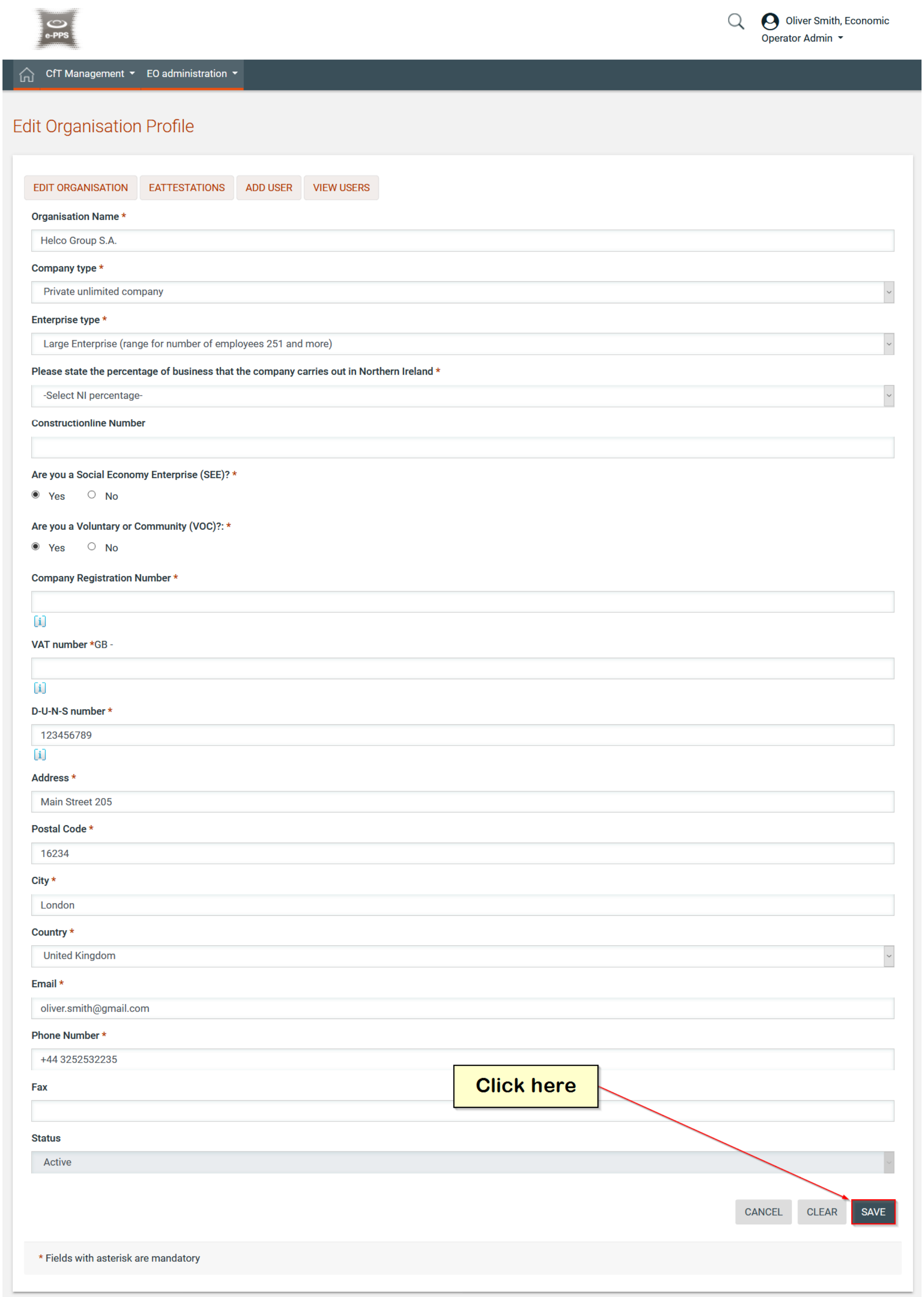


Figure 31: Save organisation modification

3.7.2. View the users registered under the organisation

Selecting the option “**VIEW USERS**” displays all the users registered within the selected Economic Operator organisation:

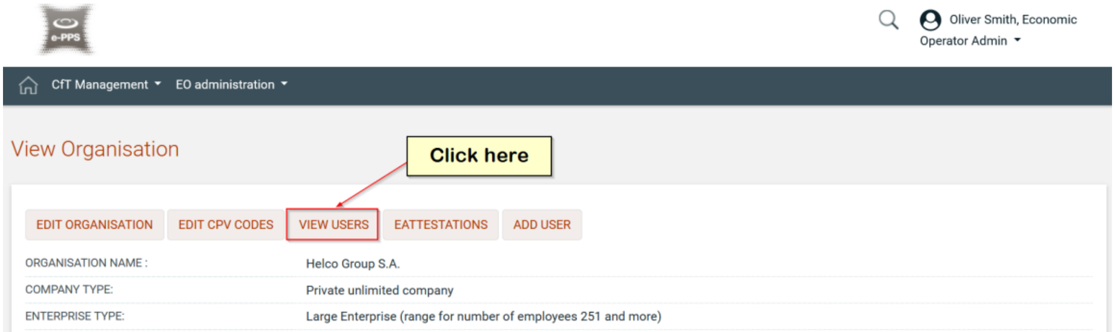
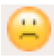


Figure 32: View users

The system displays all the registered users within the organisation.

Figure 33: Display of users registered under the Economic Operator

In the above screen, the first name, last name, the role and the country of each user are displayed. Furthermore, the current status of the each user account is also displayed:

-  - **Active**
-  - **Inactive**
-  - **Deactivated**

The following user roles are supported:

- Economic Operator Administrator (**EO Admin**). Users with this type of role are authorised to manage the users and update the details of their organisation.
- Economic Operator users (**EO Users**). Users with this type of role are not authorised to manage the details and the users of their organisation.

3.7.3. Add new user in the organisation

In order to add new users in the organisation, the EO Admin user needs to select the option “**ADD USER**”.

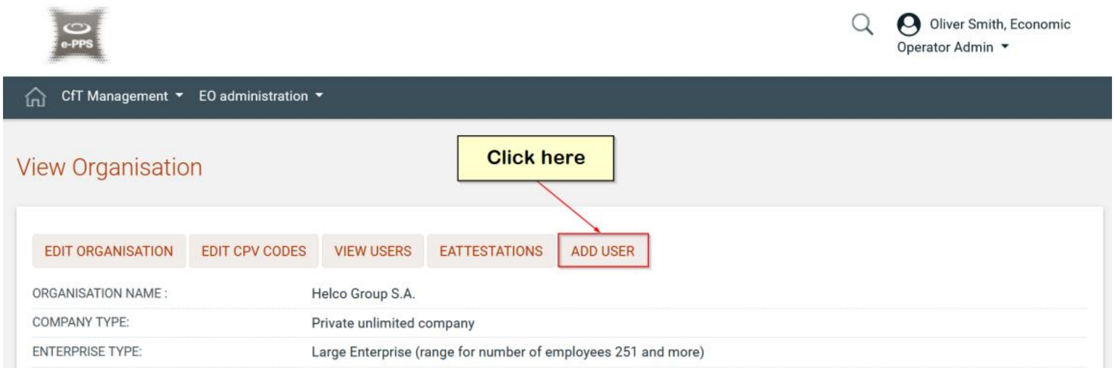


Figure 34: Add user button

The mandatory information (marked with “*”) should be provided. Once done, the user should click on the “**SAVE**” button.

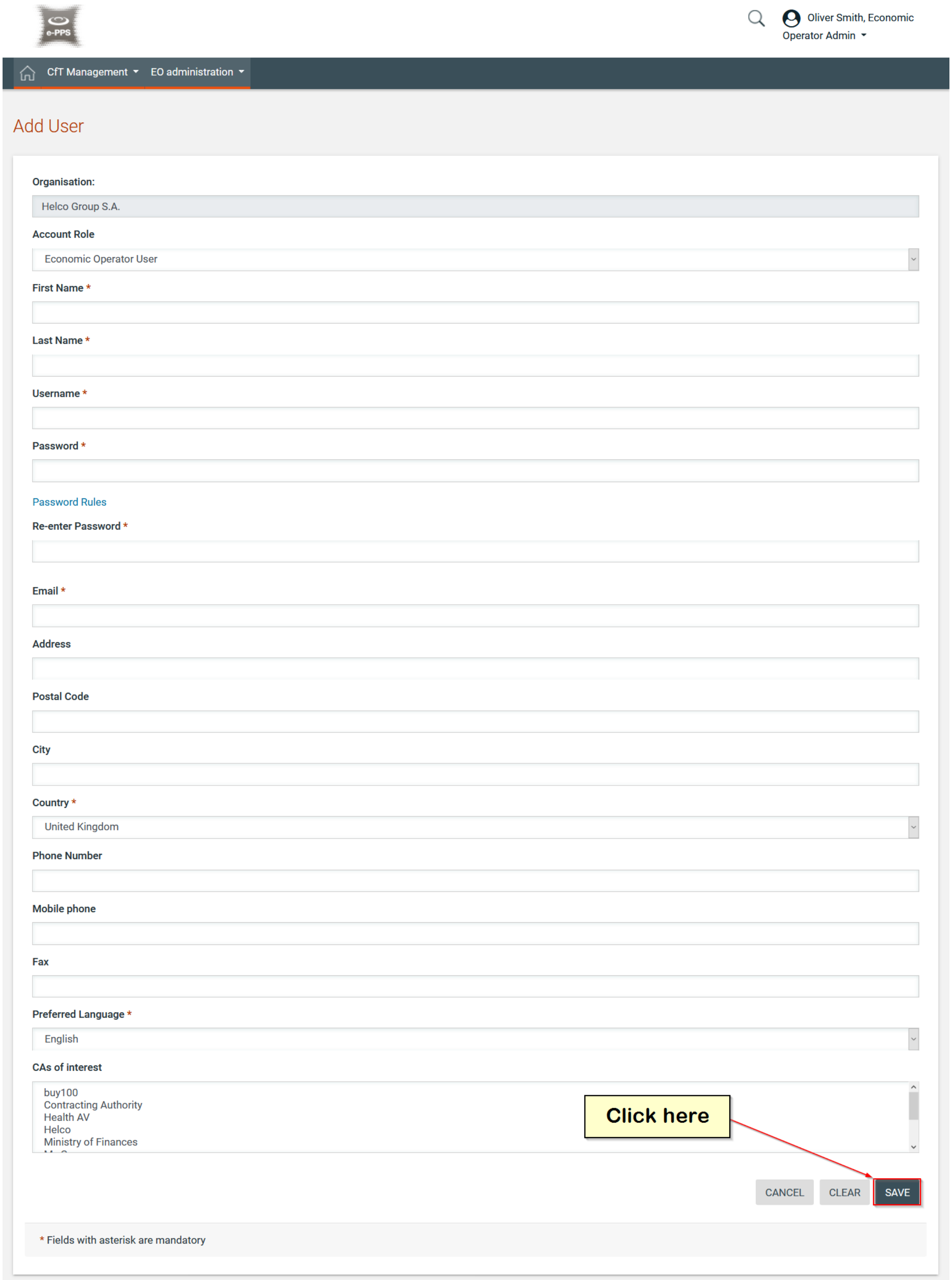
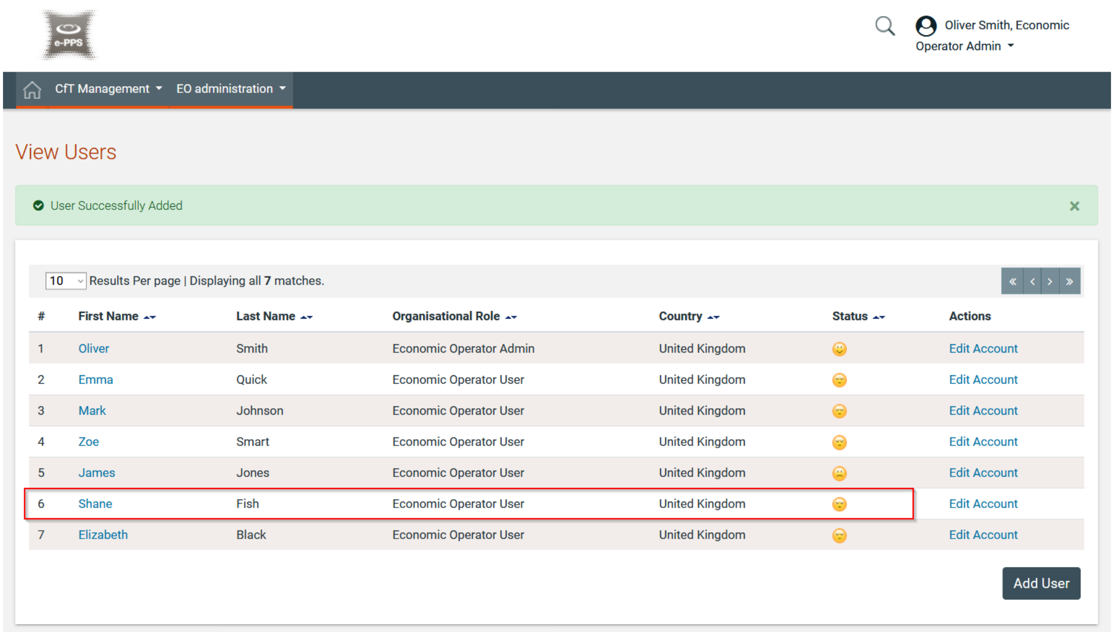


Figure 35: Add a new user in the organisation

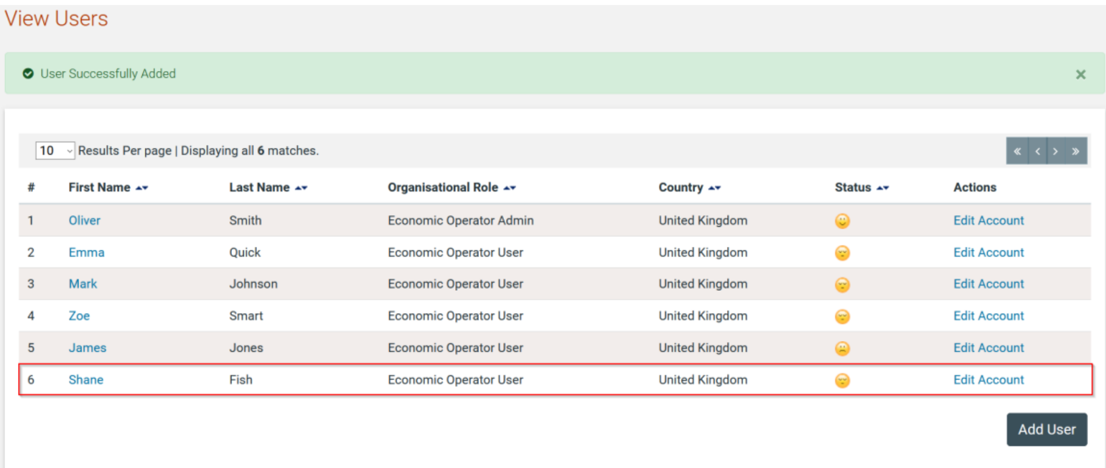
Initially, the account of the new user will be Inactive



#	First Name	Last Name	Organisational Role	Country	Status	Actions
1	Oliver	Smith	Economic Operator Admin	United Kingdom		Edit Account
2	Emma	Quick	Economic Operator User	United Kingdom		Edit Account
3	Mark	Johnson	Economic Operator User	United Kingdom		Edit Account
4	Zoe	Smart	Economic Operator User	United Kingdom		Edit Account
5	James	Jones	Economic Operator User	United Kingdom		Edit Account
6	Shane	Fish	Economic Operator User	United Kingdom		Edit Account
7	Elizabeth	Black	Economic Operator User	United Kingdom		Edit Account

Figure 1: The account of the newly added user is inactive

The system will send an email to the new user confirming the successful registration. The email will contain the relevant transaction number. In order to activate his account the user must provide this number during his first login. Thereafter, the status of the account will be activated.



#	First Name	Last Name	Organisational Role	Country	Status	Actions
1	Oliver	Smith	Economic Operator Admin	United Kingdom		Edit Account
2	Emma	Quick	Economic Operator User	United Kingdom		Edit Account
3	Mark	Johnson	Economic Operator User	United Kingdom		Edit Account
4	Zoe	Smart	Economic Operator User	United Kingdom		Edit Account
5	James	Jones	Economic Operator User	United Kingdom		Edit Account
6	Shane	Fish	Economic Operator User	United Kingdom		Edit Account

Figure 36: The account of the new added user is activated

3.7.4. Edit user details

The user can select the option “**Edit Account**” to edit the details of a specific user. The system will display the user’s details allowing their modification:

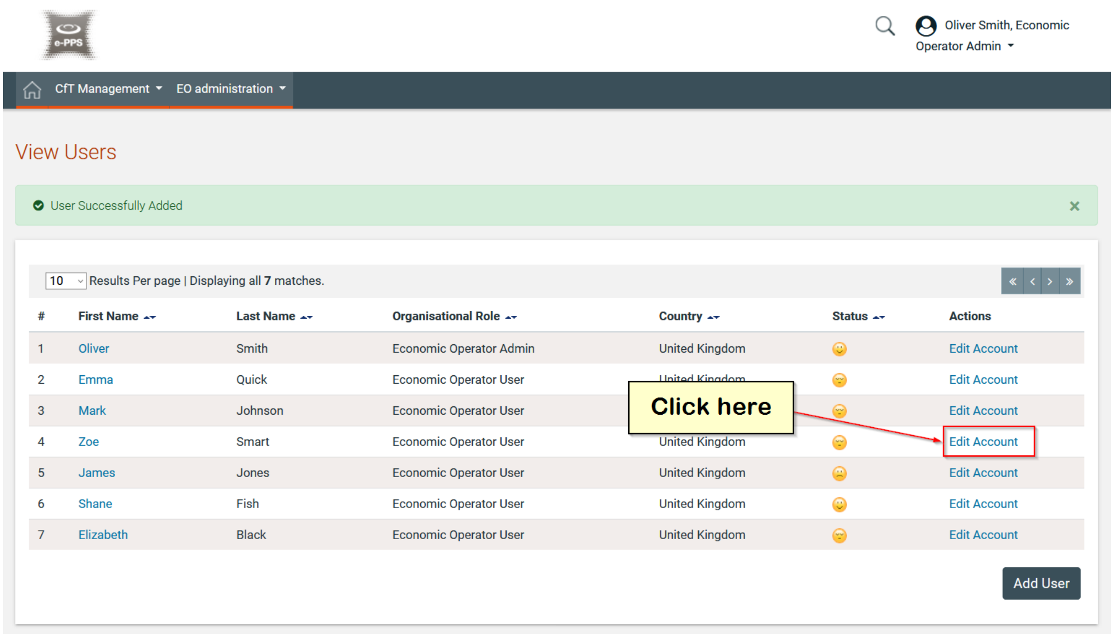


Figure 37: Edit account link

Clicking on the button “**SAVE**” will update the user’s details.

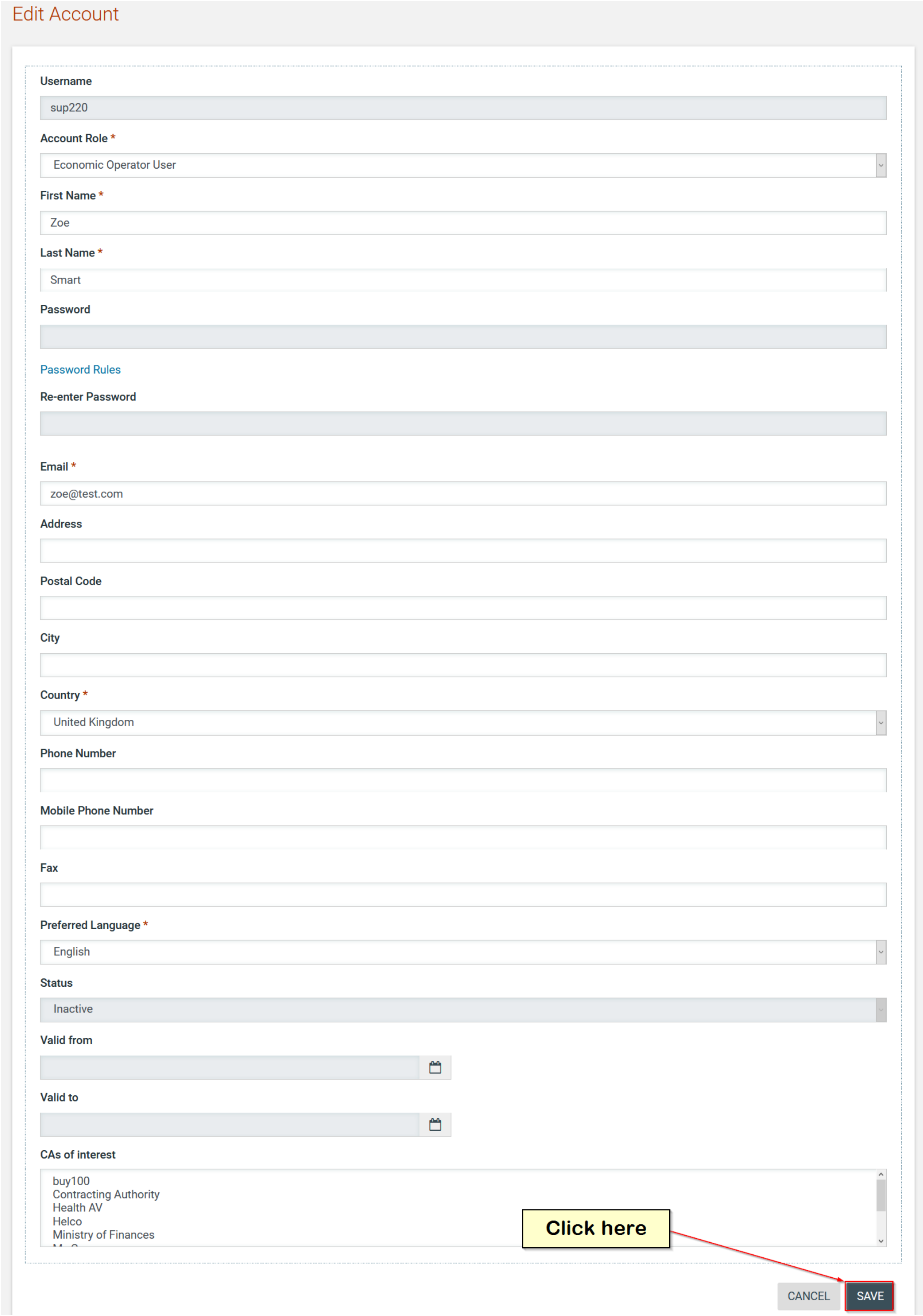


Figure 38: Editing user details

3.7.5. Edit CPV codes of interest

In order to edit the CPV codes associated with the Economic Operator the user clicks on the “**EDIT CPV CODES**” option in EO Organisation management page.

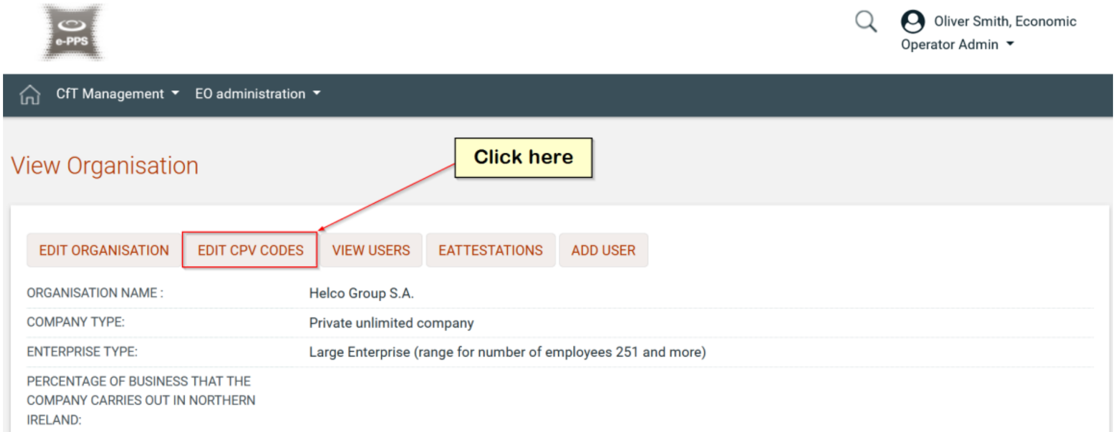


Figure 39: Edit CPV codes

The system displays the CPV codes which are currently associated with the Economic Operator:

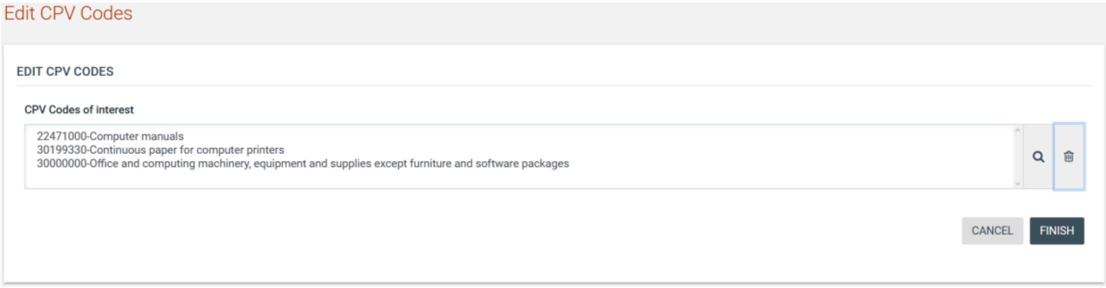


Figure 40: Accessing the CPV codes functionality

The user can add new CPV codes through clicking on the “ ” button. The button “ ” is used to delete a selected CPV code. For more information about how to use the CPV codes see section 13.1 Inserting Common Procurement Vocabulary Codes (CPV) .

Once modified the associated CPV codes, the user should click on the “**FINISH**” button to store the changes.

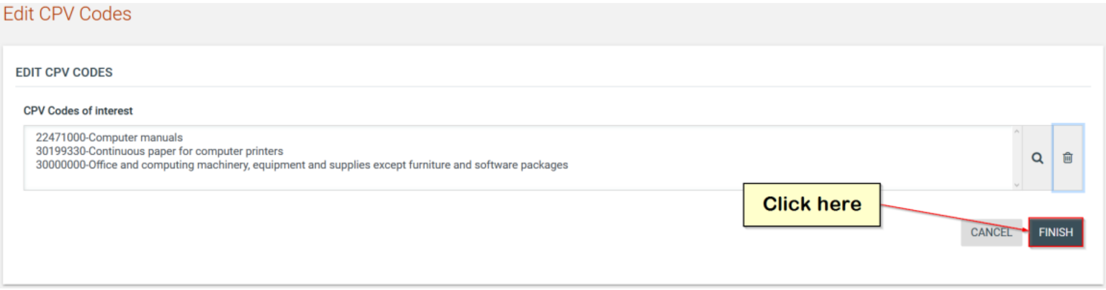


Figure 41: Edit CPV codes

3.7.6. eAttestation functionality (Certificates)

Certificates can be processed by suppliers so those can be automatically part of their tender response when required by the tender specifications. Initially a supplier user has not processed any of the available certificates for their organisation.

Figure 42: No Certificates Assigned

The supplier selects which certificate(s) to add for their organisation's needs.

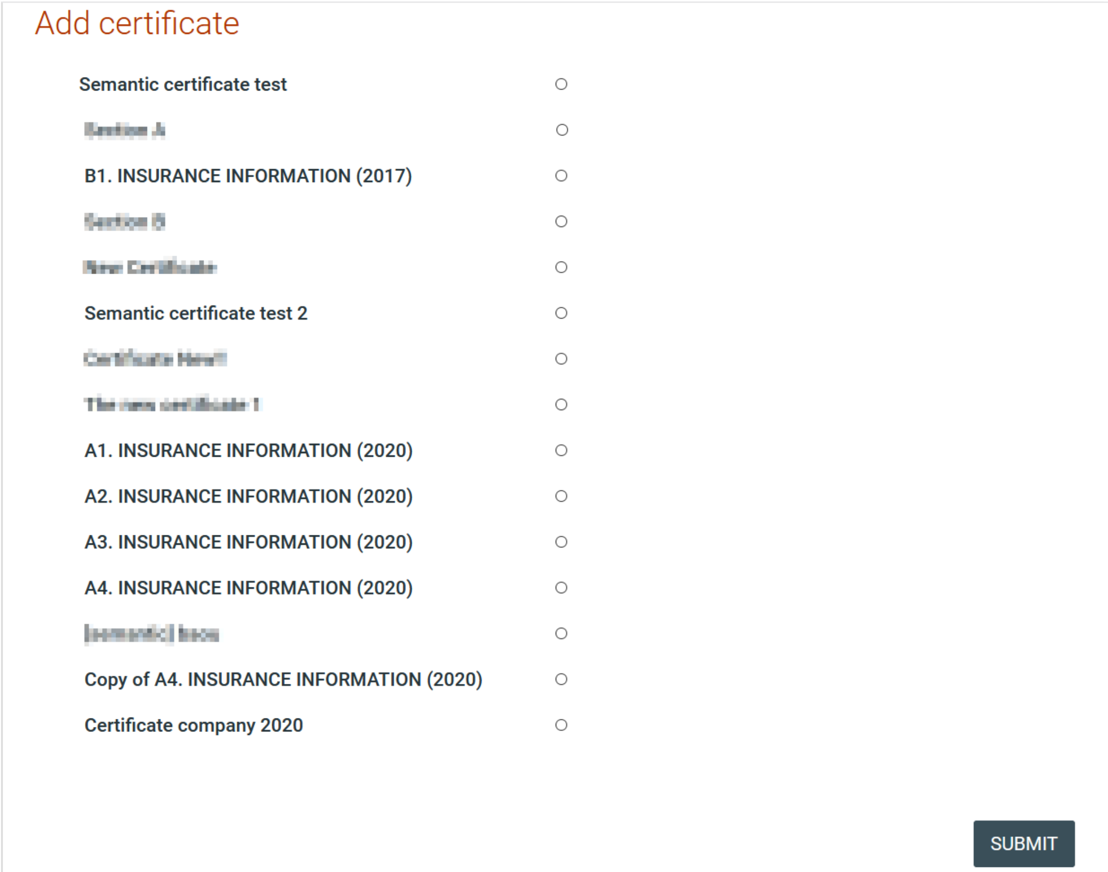


Figure 43: Add Certificate

Please note that as soon as a new certificate is added by the user, the certificate is stored in the "Invalid" certificates. The supplier should either click on the certificate title or select it and click on the "EDIT CERTIFICATE DOCUMENTS" to process it for their future needs.

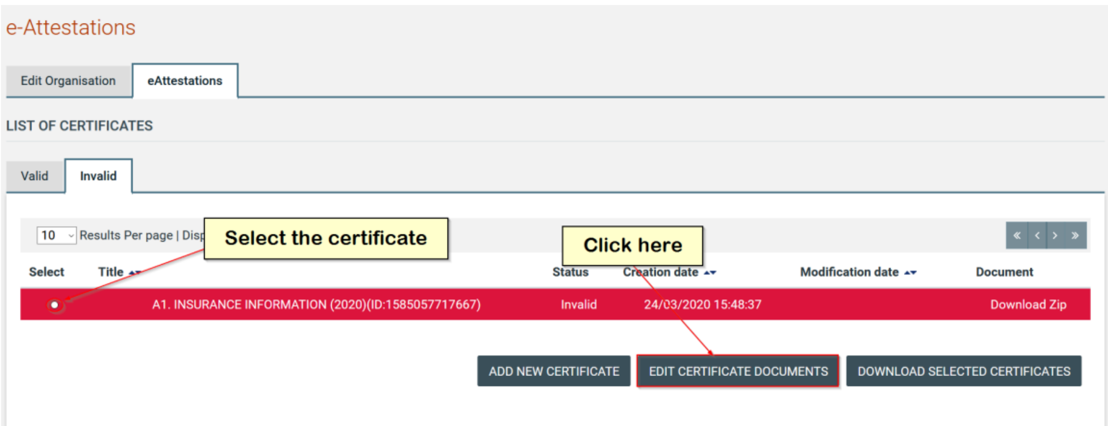


Figure 44: Added Certificate

In order for the user to edit a certificate criterion:

- Select a certificate criterion
- Click on the tools button
- Click on the “EDIT” option

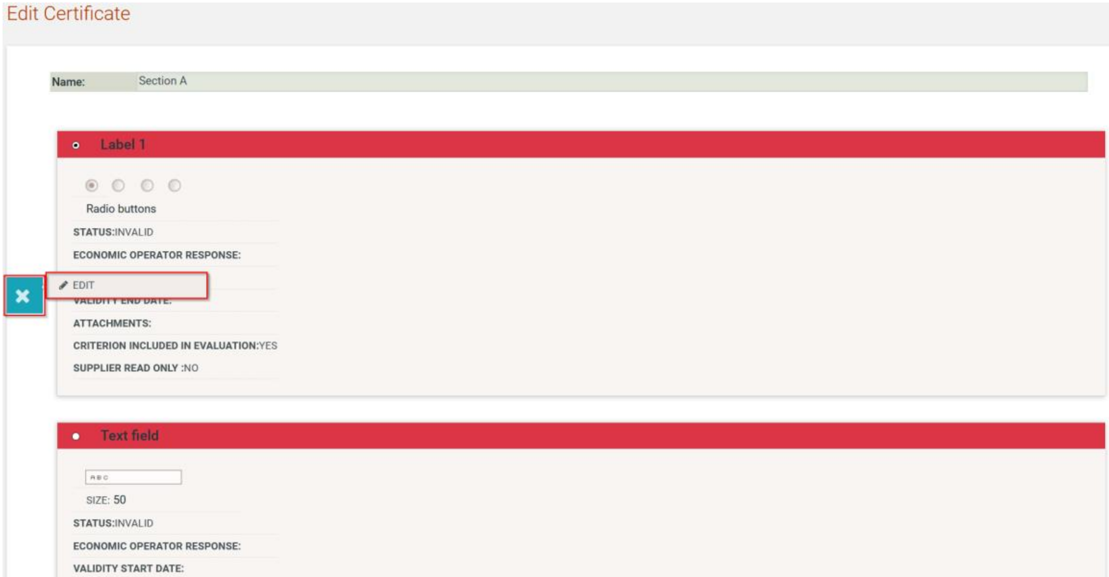


Figure 45: View Certificate Details

The supplier should provide the related information, and click on the “SUBMIT” button.

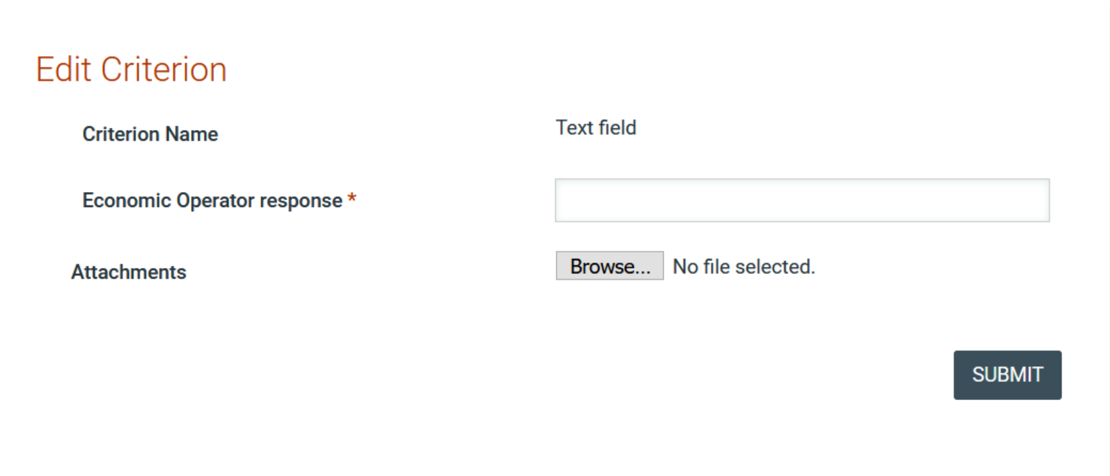


Figure 46: Edit Certificate Criterion

Once all the certificate criteria are populated, the supplier should click on the "VALIDATE".

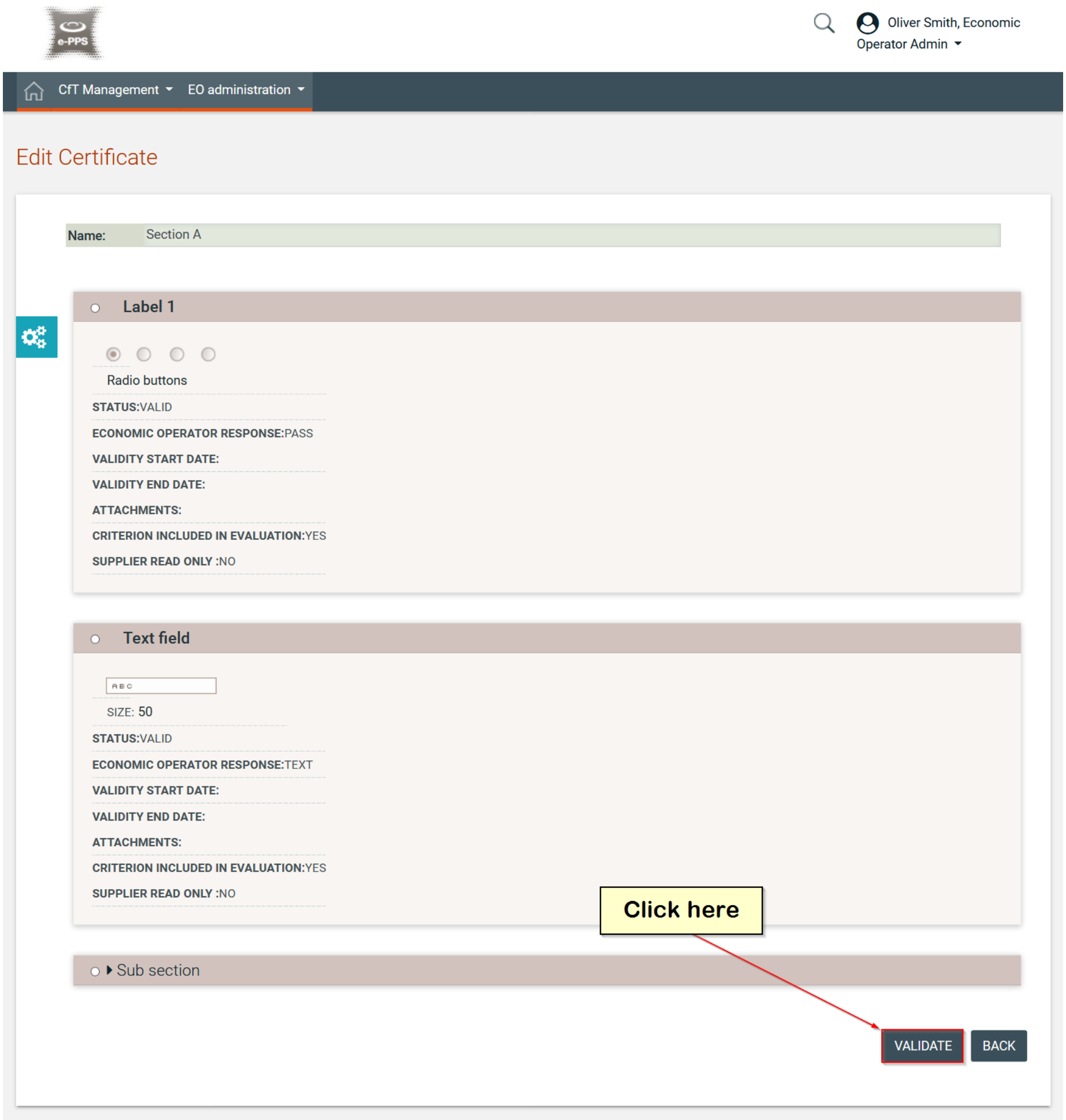


Figure 47: Validate Certificate

If all the criteria are populated correctly, the certificate validates successfully and is transferred into the "VALID" tab.

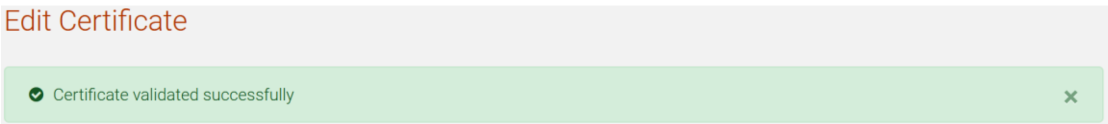


Figure 48: Certificate validates successfully

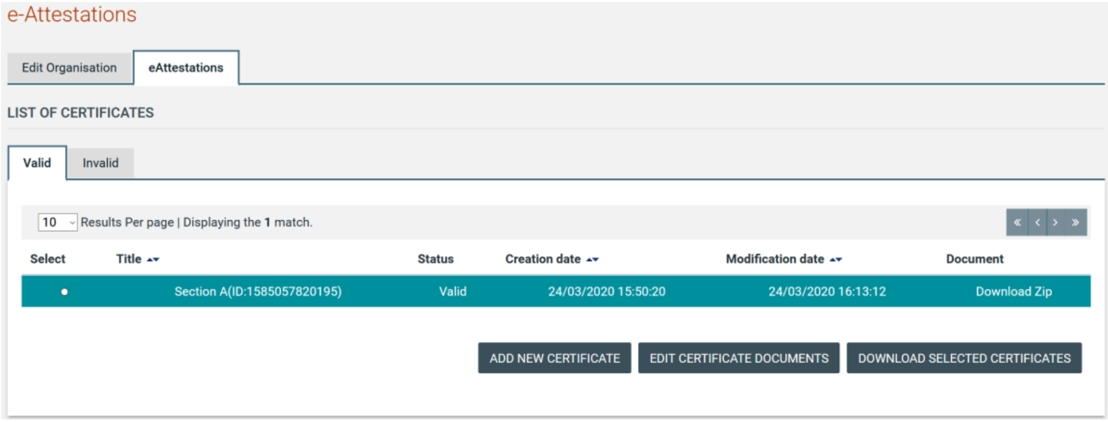


Figure 49: Valid Certificate

3.7.7. Correspondence

Correspondence is available either through the EO Administration menu, or the User Homepage.

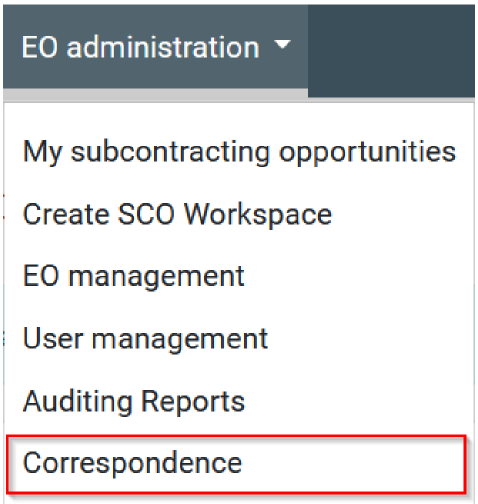


Figure 50: EO Administration Menu - Correspondence

Tab ‘**Inbox**’ displays received messages in a paginated list with “Subject”, “Sender (From)” and “Date” columns.

A message not read by the user viewing their incoming messages are bold, whereas messages read are not.

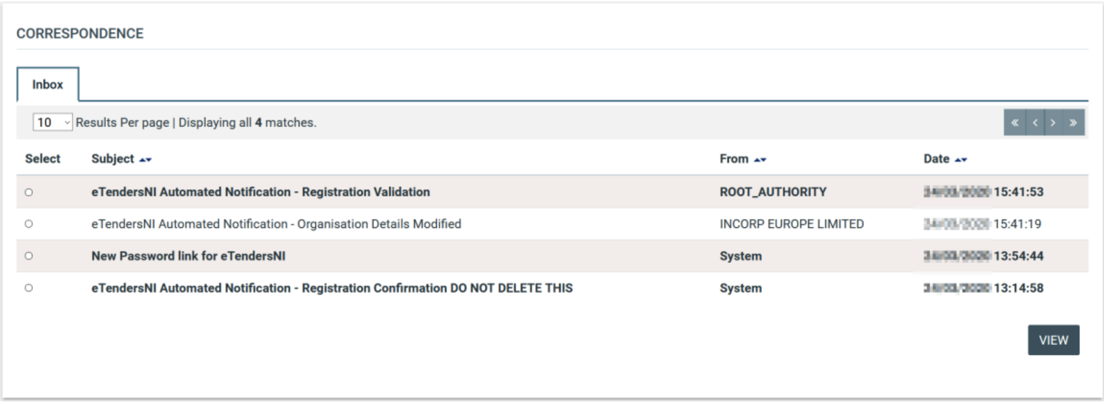


Figure 51: Correspondence functionality

To view a message, the user selects it and then clicks on the "VIEW" button. The selected message is displayed next.

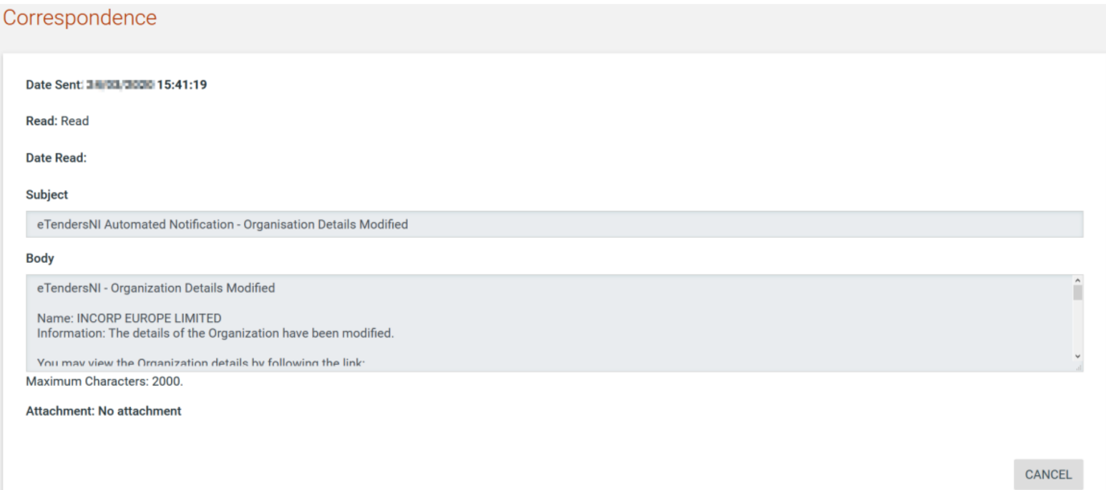


Figure 52: View an Incoming Message

4. Searching Functionality

eTendersNI provides a "**Simple**" and an "**Advanced**" search functionality. Both functionalities allow searching for Call for Tenders (e.g. CfTs) and Organisations (e.g. Contracting Authorities).

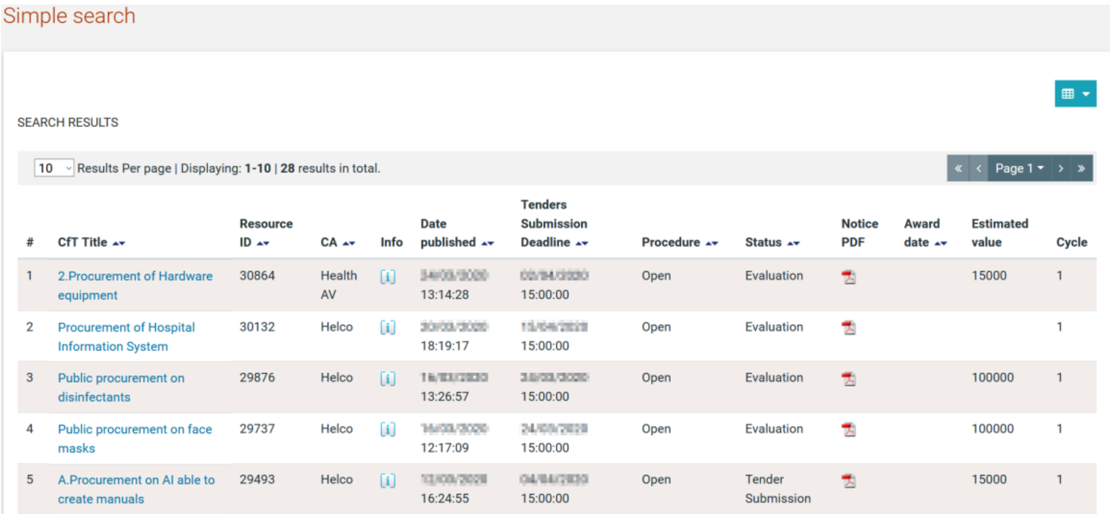
4.1. Simple Search

The simple search functionality covers searching for available Call for Tenders (e.g. CfT) and Organisations (e.g. Contracting Authorities).

Simple search queries are performed by:

1. Click on the " " icon on the top-right corner.
2. Select the type of searching (Call for Tender or Users) from the selection list
3. Provide the full name of the required record or part of it using the "*" wildcard
4. Click on the " " button

The results, if any, are then presented in a tabular form.


Simple search

SEARCH RESULTS

10 Results Per page | Displaying: **1-10** | **28** results in total. Page 1

#	CfT Title	Resource ID	CA	Info	Date published	Tenders Submission Deadline	Procedure	Status	Notice PDF	Award date	Estimated value	Cycle
1	2.Procurement of Hardware equipment	30864	Health AV		[illegible] 13:14:28	[illegible] 15:00:00	Open	Evaluation			15000	1
2	Procurement of Hospital Information System	30132	Helco		[illegible] 18:19:17	[illegible] 15:00:00	Open	Evaluation				1
3	Public procurement on disinfectants	29876	Helco		[illegible] 13:26:57	[illegible] 15:00:00	Open	Evaluation			100000	1
4	Public procurement on face masks	29737	Helco		[illegible] 12:17:09	[illegible] 15:00:00	Open	Evaluation			100000	1
5	A.Procurement on AI able to create manuals	29493	Helco		[illegible] 16:24:55	[illegible] 15:00:00	Open	Tender Submission			15000	1

Figure 53: Simple search for Call for Tenders

Figure 54: Simple search for Organisations

After performing a search for an organisation, the user can have access to the organisation's details through selecting its name.

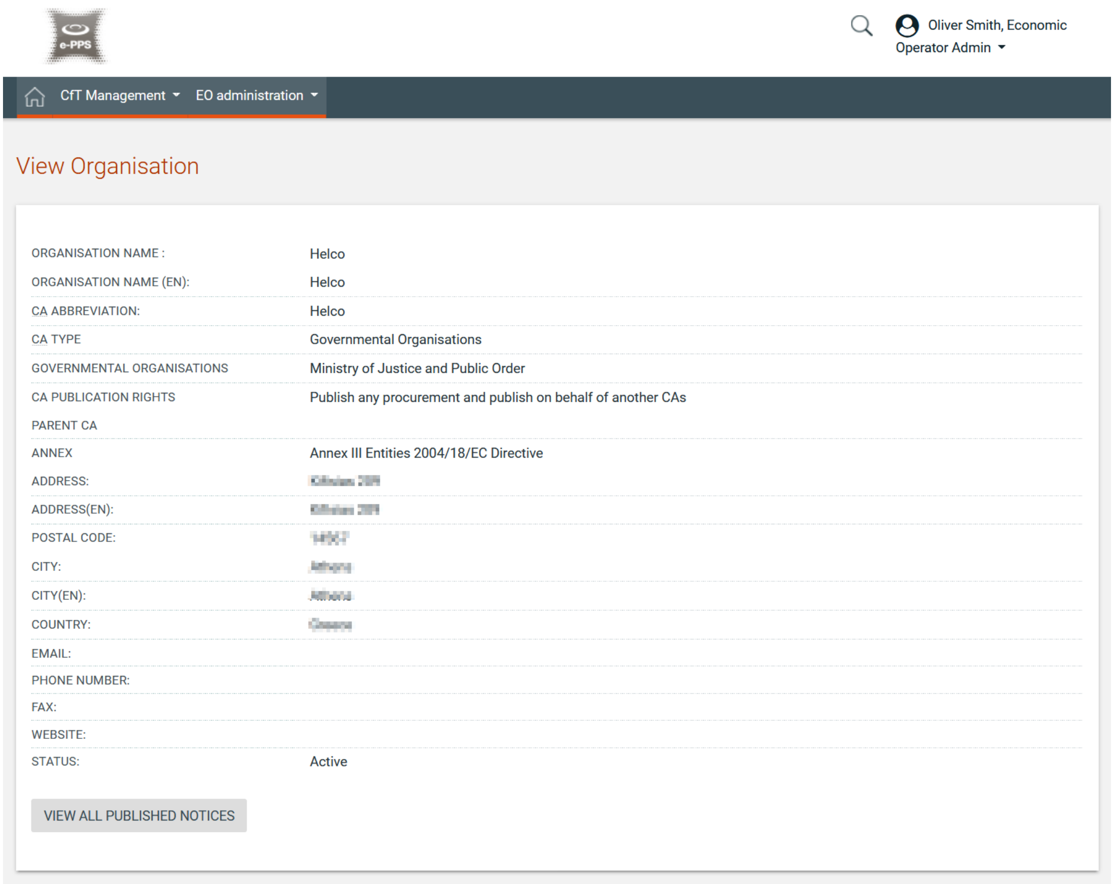


Figure 55: Details of an Organisation

The user can also have access to the published notices of this particular organisation if (s)he clicks on the "VIEW ALL PUBLISHED NOTICES" button.

Published Notices

10 Results Per page | Displaying: **1-10** | **34** results in total. Page 1

Type	Title	Date Upl.	Lang.	Status	Date Pub.
Contract Notice	8. Procurement for safety trainings and certifications (Testing submissions received offline)	[illegible] 10:45:51	EN	Published	[illegible] 10:46:30
Contract Notice	Printers Order (restricted procedure)	[illegible] 14:13:13	EN	Published	[illegible] 14:13:55
Contract Notice	6. Procurement of works renovating of several ministry building	[illegible] 12:55:39	EN	Published	[illegible] 12:56:29
Contract Notice	1.Procurement of Hardware, Printers for Ministry offices	[illegible] 14:57:22	EN	Published	[illegible] 14:57:55
Contract Notice	2.Procurement of Hardware equipment, printers for Ministry	[illegible] 15:41:15	EN	Published	[illegible] 15:41:58
Contract Notice	3.Public procurement on building renovation, Ministry renovating building curtains.	[illegible] 16:39:56	EN	Published	[illegible] 16:40:31
Contract Award Notice	6. Procurement of works renovating of several ministry building	[illegible] 14:33:57	EN	Published	[illegible] 14:34:08

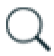
Figure 56: View all Published Notices for an Organisation

Once the user clicks on the type of the notice he wants to access, he will be asked whether he wants to view or download it.

4.2. Advanced search

The advanced search functionality enables searching for Call for Tenders (e.g. CfTs), Subcontracting Opportunities and Organisations (e.g. Contracting Authorities).

In order to perform an advanced search query, the user should:

1. Click on the “  ” icon on the top-right corner
2. Click on the “Advanced search” link
3. Select the type of the search through using the appropriate tab (e.g. CfT, Subcontracting, Organisation)
4. Fill in the search parameters in the available fields (e.g. “CfT Resource ID”, “Title”, “Publication date”, etc.). Use of “*” wildcard is also supported
5. Click on the “**SEARCH”** button

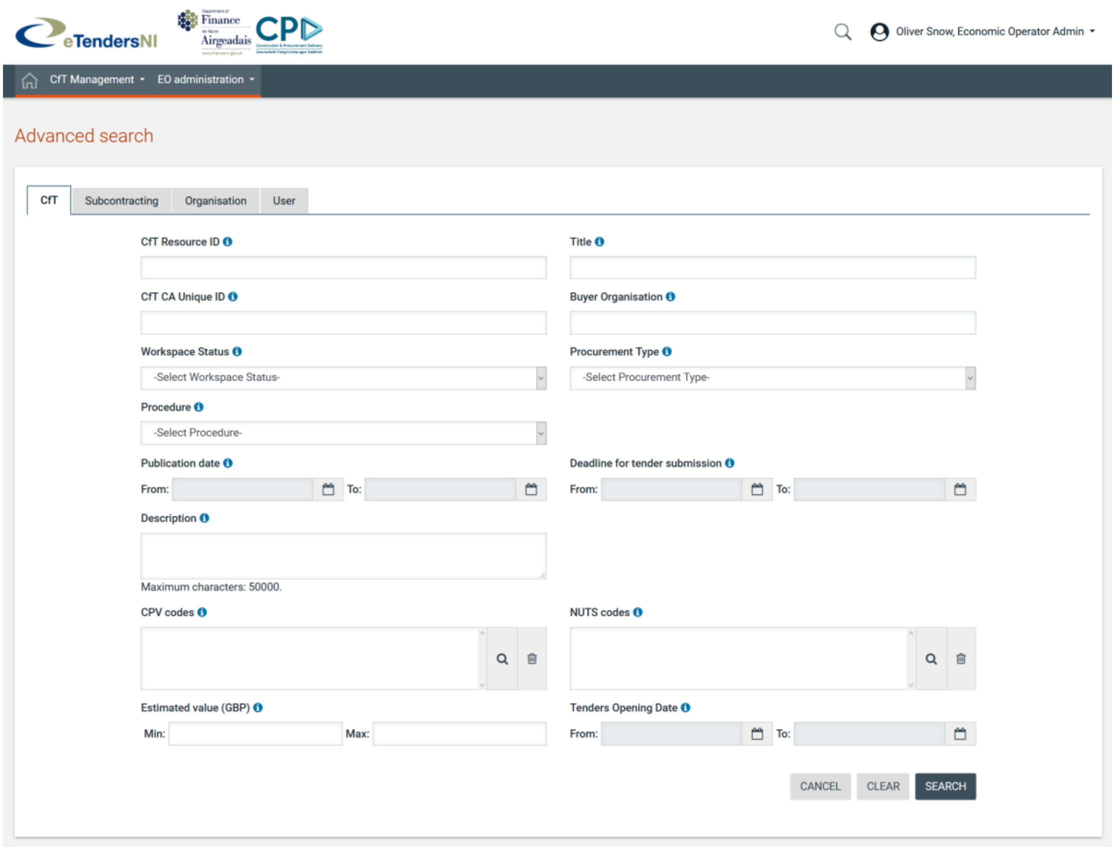
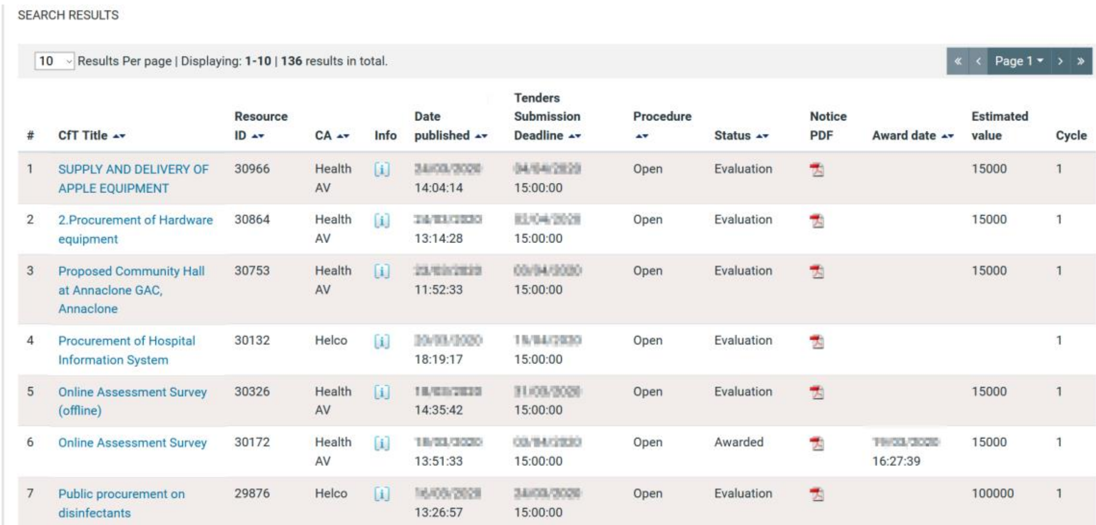


Figure 57: Advanced search functionality

The results, if any, will be presented in a tabular form. In case of multiple search results, the system displays them in several pages. The number of results for each page can be configured using the functionality at the top of the Search Results table. Moreover, the user can also use the navigation functions to move to a particular page number.



SEARCH RESULTS

10 Results Per page | Displaying: **1-10** | **136** results in total. Page 1

#	CfT Title	Resource ID	CA	Info	Date published	Tenders Submission Deadline	Procedure	Status	Notice PDF	Award date	Estimated value	Cycle
1	SUPPLY AND DELIVERY OF APPLE EQUIPMENT	30966	Health AV		[illegible] 14:04:14	[illegible] 15:00:00	Open	Evaluation			15000	1
2	2.Procurement of Hardware equipment	30864	Health AV		[illegible] 13:14:28	[illegible] 15:00:00	Open	Evaluation			15000	1
3	Proposed Community Hall at Annaclone GAC, Annaclone	30753	Health AV		[illegible] 11:52:33	[illegible] 15:00:00	Open	Evaluation			15000	1
4	Procurement of Hospital Information System	30132	Helco		[illegible] 18:19:17	[illegible] 15:00:00	Open	Evaluation				1
5	Online Assessment Survey (offline)	30326	Health AV		[illegible] 14:35:42	[illegible] 15:00:00	Open	Evaluation			15000	1
6	Online Assessment Survey	30172	Health AV		[illegible] 13:51:33	[illegible] 15:00:00	Open	Awarded		[illegible] 16:27:39	15000	1
7	Public procurement on disinfectants	29876	Helco		[illegible] 13:26:57	[illegible] 15:00:00	Open	Evaluation			100000	1

Figure 58: Advanced search results for Call for Tenders for an Economic Operator

In order to search for an organisation (e.g. Contracting Authority), the user should provide all the necessary information.

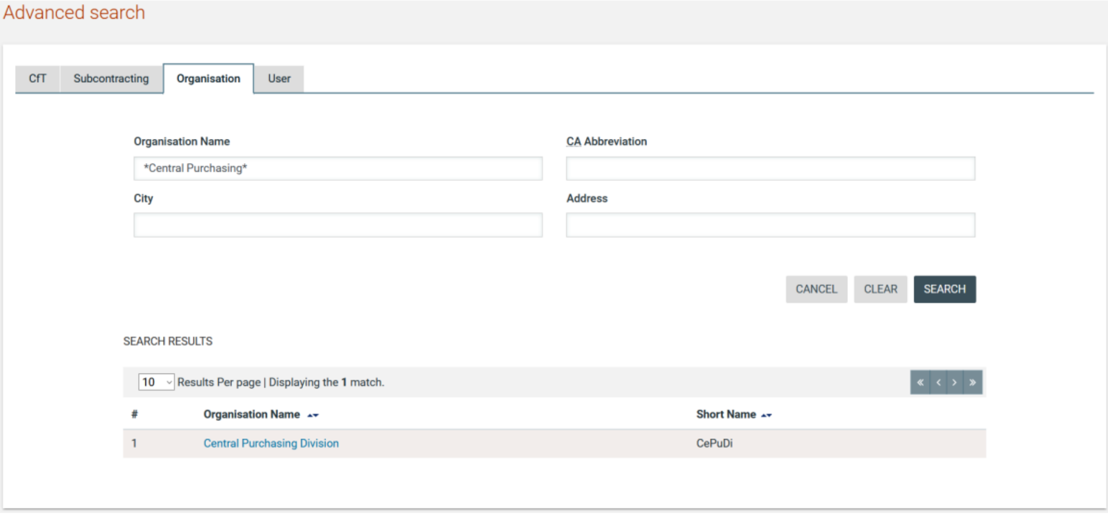


Figure 59: Advanced search results for Organisations for an Economic Operator

In order to search for a specific user of own organisation, the user should provide all the necessary information.

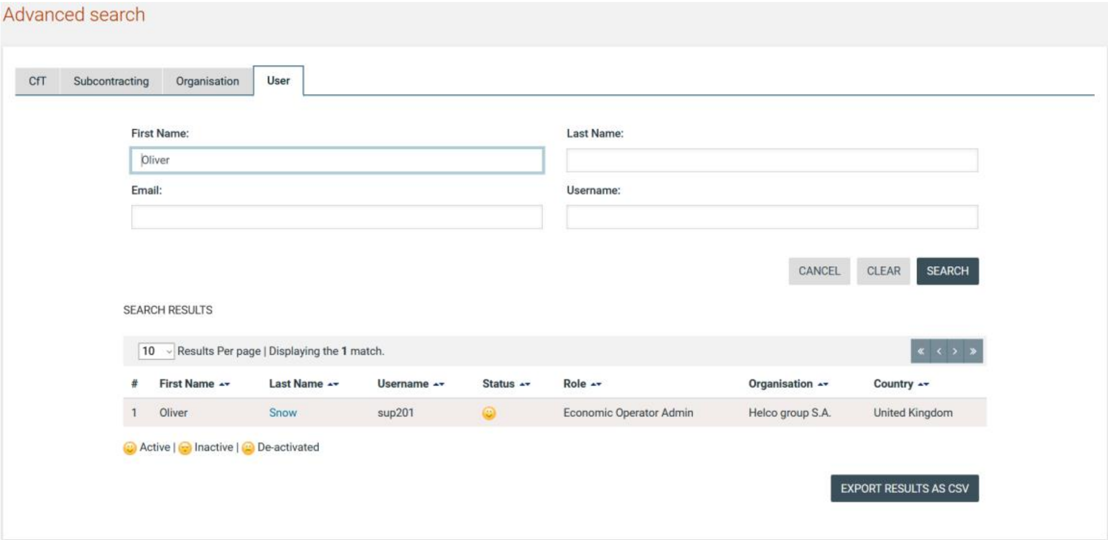
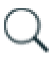


Figure 60: Advanced search for own users for an Economic Operator

4.3. View Current Opportunities

In order to view the latest Call for Tenders published within the service, the user should follow the below instructions:

1. Click on the “  ” icon on the top-right corner
2. Click on the “View current opportunities” link

This will present automatically the list of the latest Call for Tenders that are available to the user (depending on his/her access rights).

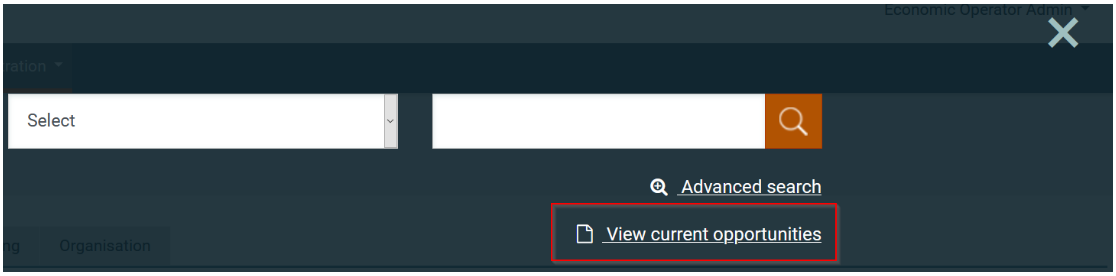


Figure 61: View Current Opportunities

5. View CfT Workspace

In order for the user to preview the details of a call for tender (e.g. CfT) user should select the “**CfT core information**” option from the “**Show CfT Menu**.

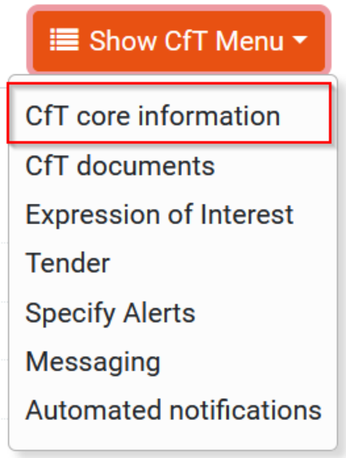


Figure 62: “CfT core information” option in the “Show CfT Menu”

The system will display all Call for Tender’s details of a particular Call for Tender (e.g. Title, Procurement Type, information regarding associated deadlines, etc.).

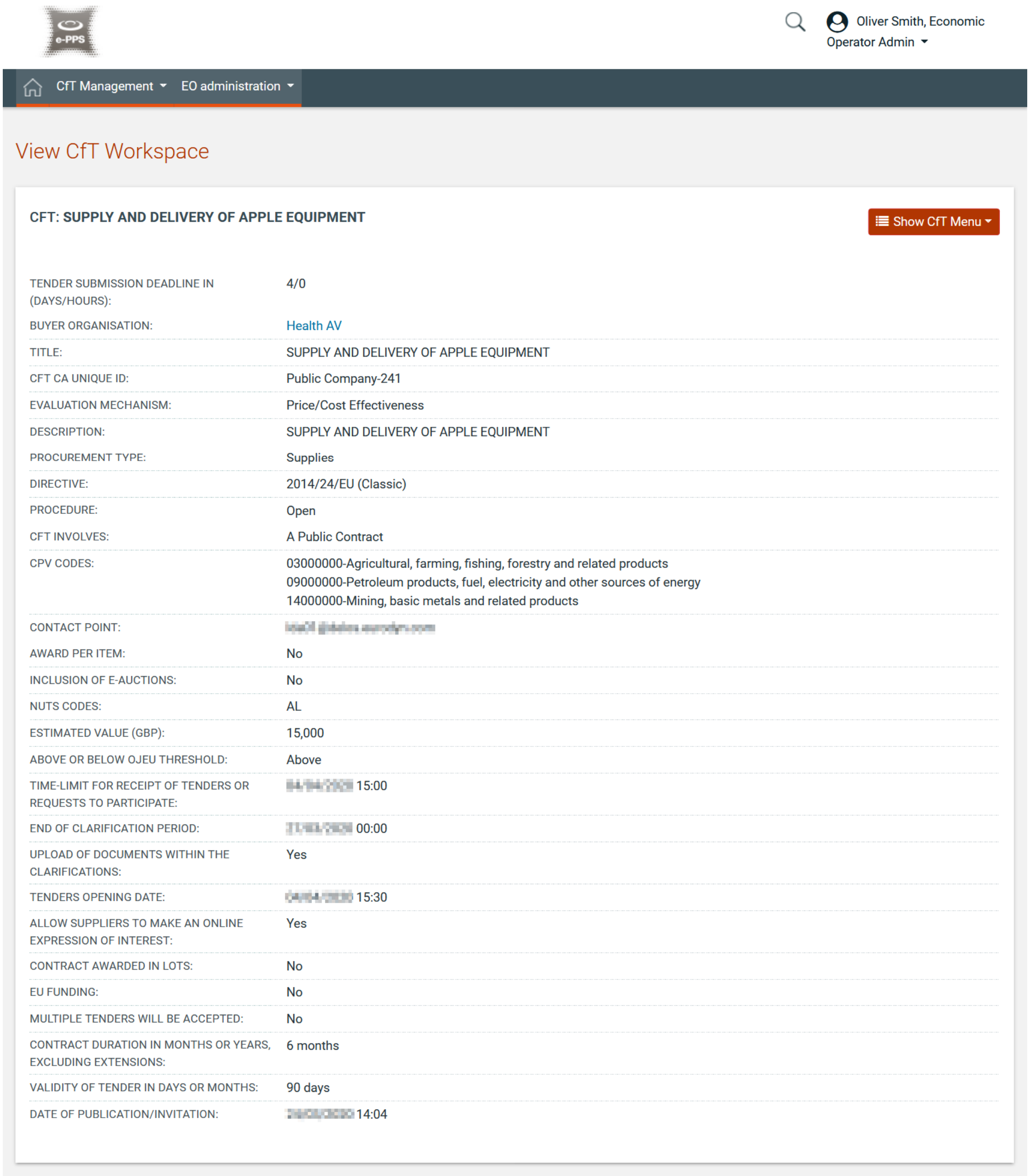


Figure 63: View CfT workspace

6. View CfT Documents

In order for a user to preview and download all documents associated with a particular Call for Tender (i.e. publication notices being published for this CfT), he should select the "**CfT documents**" option from the "**Show CfT Menu"**.

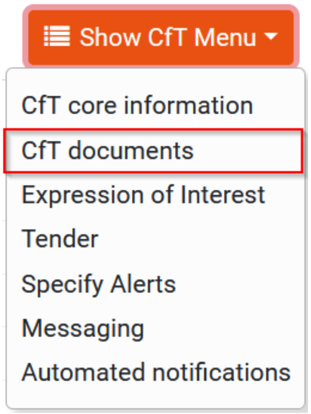


Figure 64: "CfT documents" option in the "Show CfT Menu"

The platform displays all notices and contract documents which are associated with the Call for Tender. The "**Notices**" tab contains a list of all notices for the Call for Tender. The list provides the type of the notice, the date when the notice was uploaded in the system and the status of the notice. In order for the user to download a notice (s)he needs to select the relevant link in the "**Type**" column.

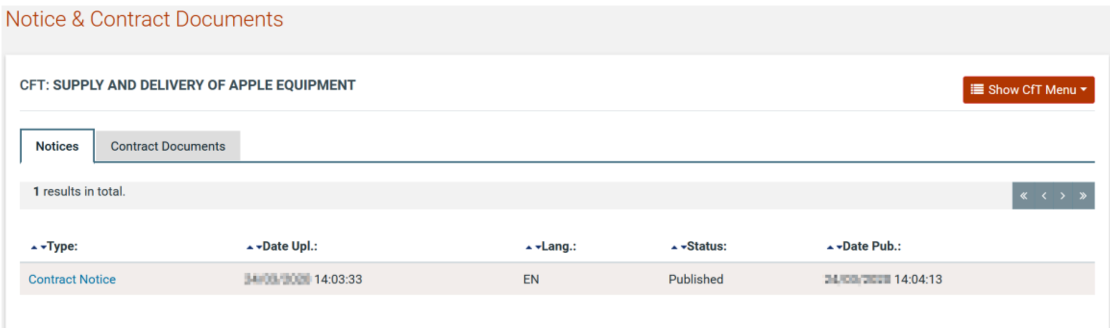


Figure 65: Contract Notices

The "**Contract Documents**" tab lists all documents which are associated with the Call for Tender.

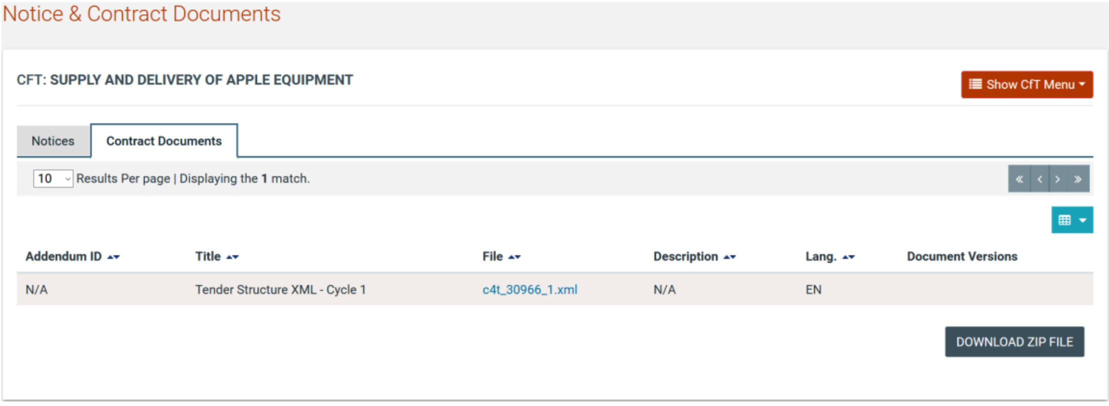


Figure 66: Contract documents

7. Register for Notifications for a Call for Tender

In order for the user to register for notifications for a call for tender (e.g. CfT) (s)he needs to select the "**Expression of Interest"** option from the "**Show CfT Menu"**.

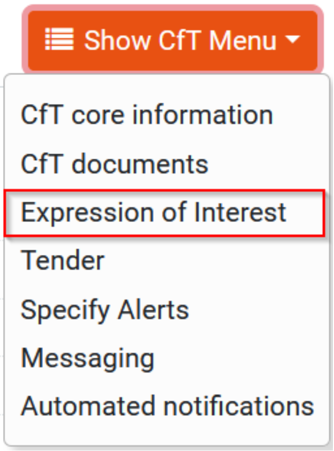


Figure 67: "Expression of Interest" option in the "Show CfT Menu"

The system prompts the user to:

- Register for Notifications by associating all users of the EO with this CfT
- Register for Notifications by associating only himself with this CfT

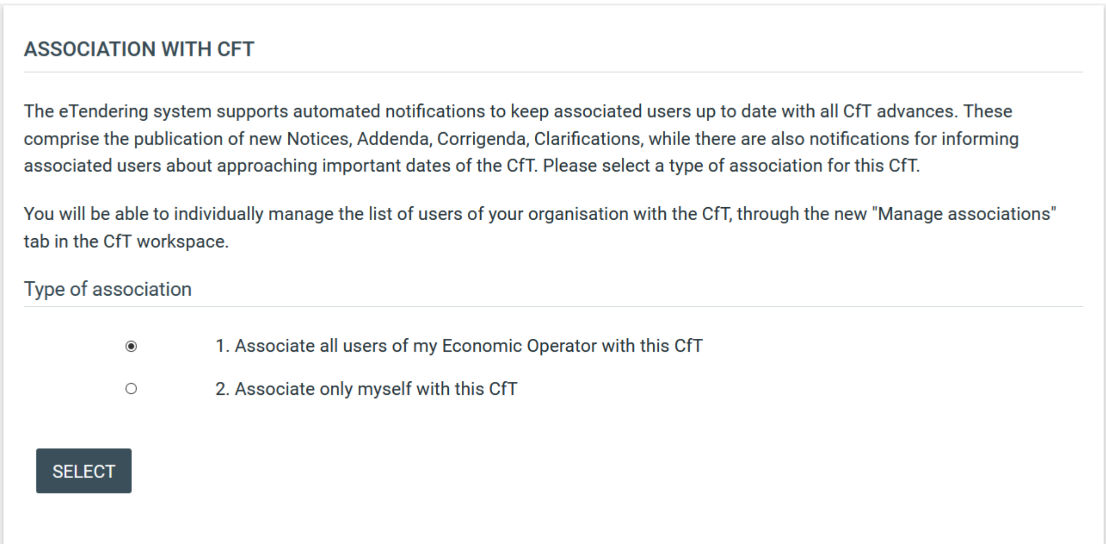


Figure 68: Register for notifications, association of users

Once the user registers for notifications, the Call for Tender will be displayed under the "List of my CfTs" as depicted in the below screenshot.

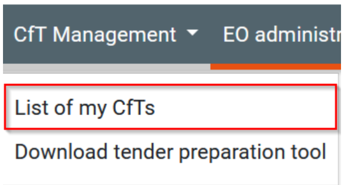


Figure 69: Selection of "List of my CfTs" option

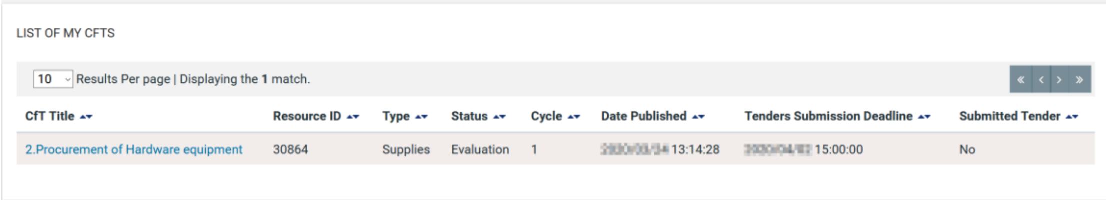


Figure 70: List of my CfTs

8. Automated notifications

In order to associate and disassociate users of the EO organisation from receiving notifications for a particular Call for Tender, the user should select the “**Automated Notifications**” option from the “**Show CfT Menu”**. In addition, the user can also specify the timing of the various alerts of the particular Call for Tender through selecting the “**Specify Alerts**” option from the “**Show CfT Menu”**.

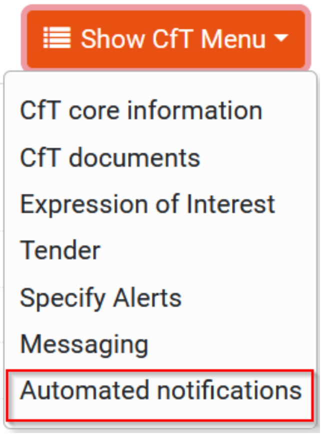


Figure 71: “Automated notifications” and “Specify alerts” options in the “Show CfT Menu”

8.1.1. Automated notifications

The system lists all user members of the EO organisation. In order to disassociate an EO member from receiving notification of a Call for Tender, the user changes the status from associated to disassociate from the drop-down menu in the “**Associate / Disassociate**” column. Similarly, changing the status from disassociated to associated will enable notification for the Call for Tender.

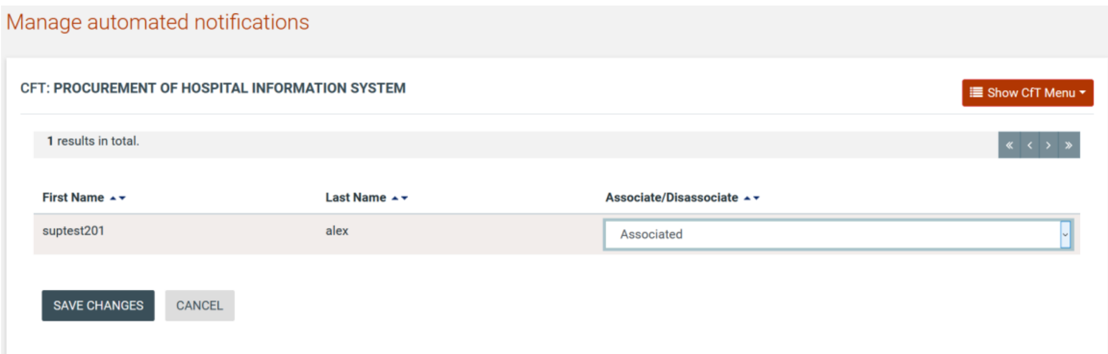


Figure 72: List of associated users within a CfT

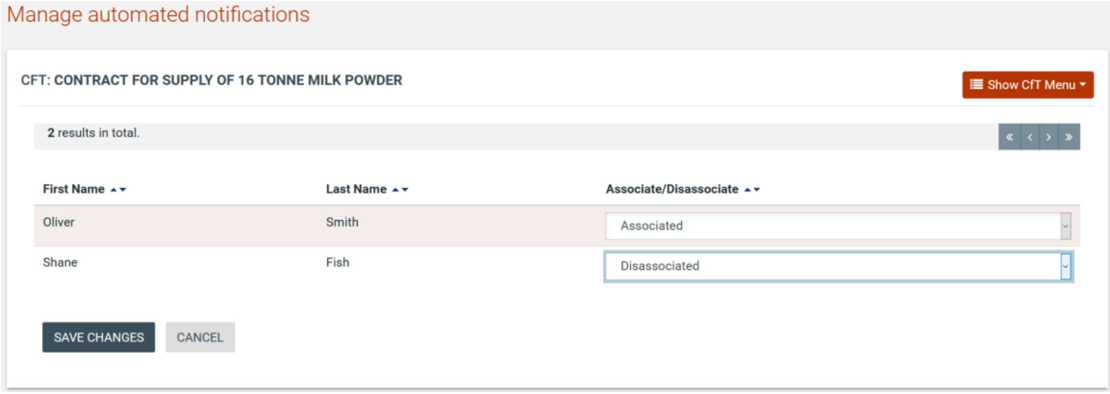


Figure 73: Disassociation of a user within a CfT

8.1.2. User alerts

The users can specify the timing of alerts of the following events:

- Time limit to receive for receipts of tenders or request to participate
- Request for clarification From
- Request for clarification To

For these events, the user can select to be notified:

- 24 hours prior of the event
- 48 hours prior of the event
- 1 week prior of the event
- 2 weeks prior of the event

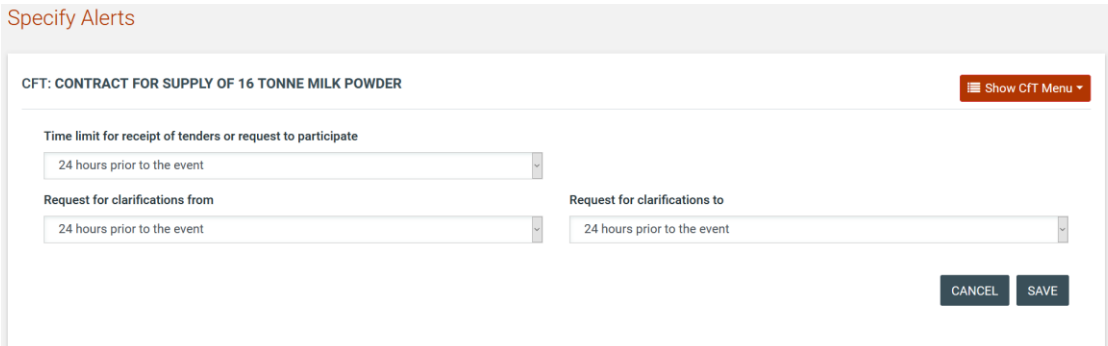


Figure 74: Specification of users alerts

9. Messaging

In order to create a message and to preview a message response, the user should select the "**Messaging**" option from the "**Show CfT Menu**".

This option is available in the "**Show CfT Menu**", after the publication of a Call for Tender.

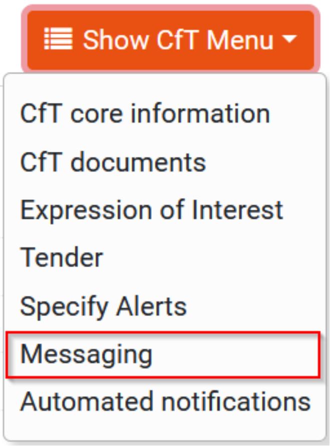


Figure 75: "Messaging" option in the "Show CfT Menu"

9.1.1. Create a Message

On clicking the "**Messaging**" option in "**Show CfT menu**" the system automatically navigates the user to the "**Inbox**" tab in the main Messaging page. In order to create a message, the user should click on the "**COMPOSE**" button.

Figure 76: CfT Messaging

The user completes the respective form by providing the following information:

- Subject
- Body
- One or two file attachments including in the message (optional)

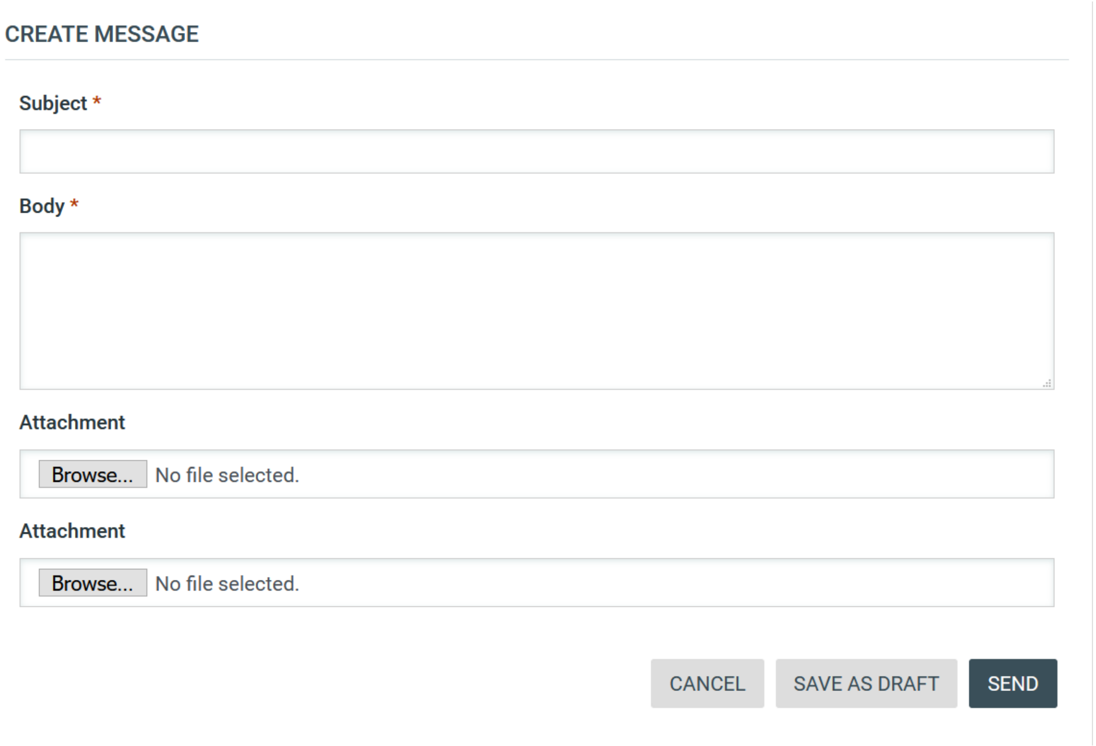


Figure 77: Send a message

Clicking on the "**SEND**" button, the system sends the message to the tender coordinator and the tender Evaluator Staff Responsible.

Clicking on the "**SAVE AS DRAFT**" button, the system saves the message to the "**Draft Messages**" tab. Then this message is accessible under the "**Draft Messages**" tab.

Clicking on the "**CANCEL**" button, the form is closed and the message is deleted.

9.1.2. View message

The user can view a message response only after it has been sent by the Procurement Officer. A list of all messaging responses is displayed in the "**Inbox**" tab of the main Messaging page.

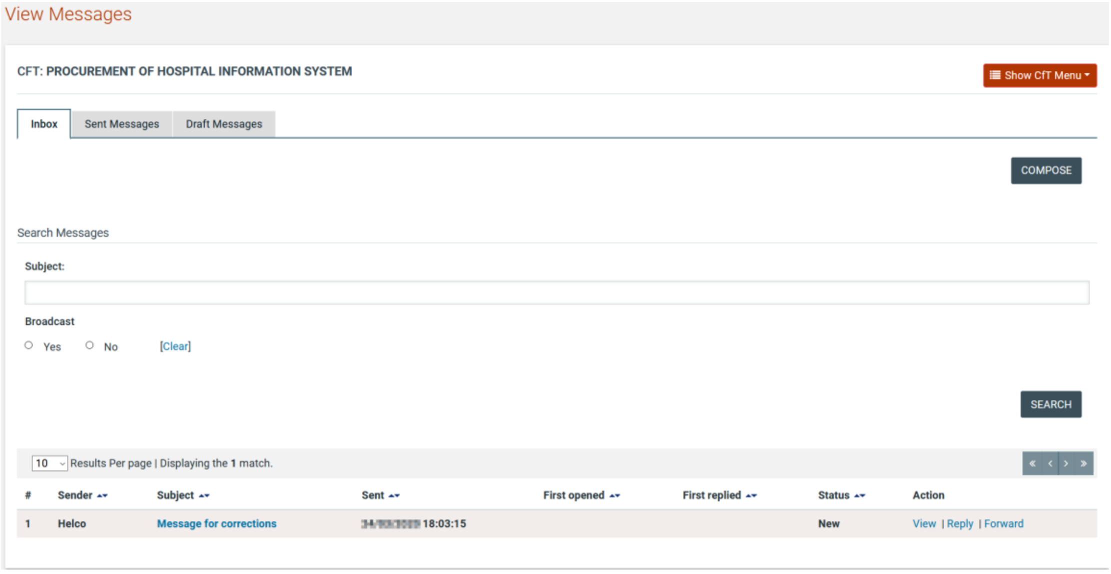


Figure 78: List of messaging responses & search message functionality

The user could search a particular message in "**Inbox**", "**Sent Messages**" as well as "**Draft Messages**" by providing the "**Subject**" of the message.

Once the user views the message, the system displays the following details:

- In the "**First opened**" column, the system displays the "Date" as well as the "Time" when the message was first read.
- In the "**First replied**" column, the system displays the "Date" as well as the "Time" when the message was first replied by the Economic Operator.

In order to preview the content of a response, the user selects either the displayed title or the "**View**" link below the "**Action**" column. Then, the system opens a new window displaying all the valuable data regarding the response:

- View message (details of the message)
- Body (Procurement Officer's response)
- Message history (all the actions regarding the particular message)

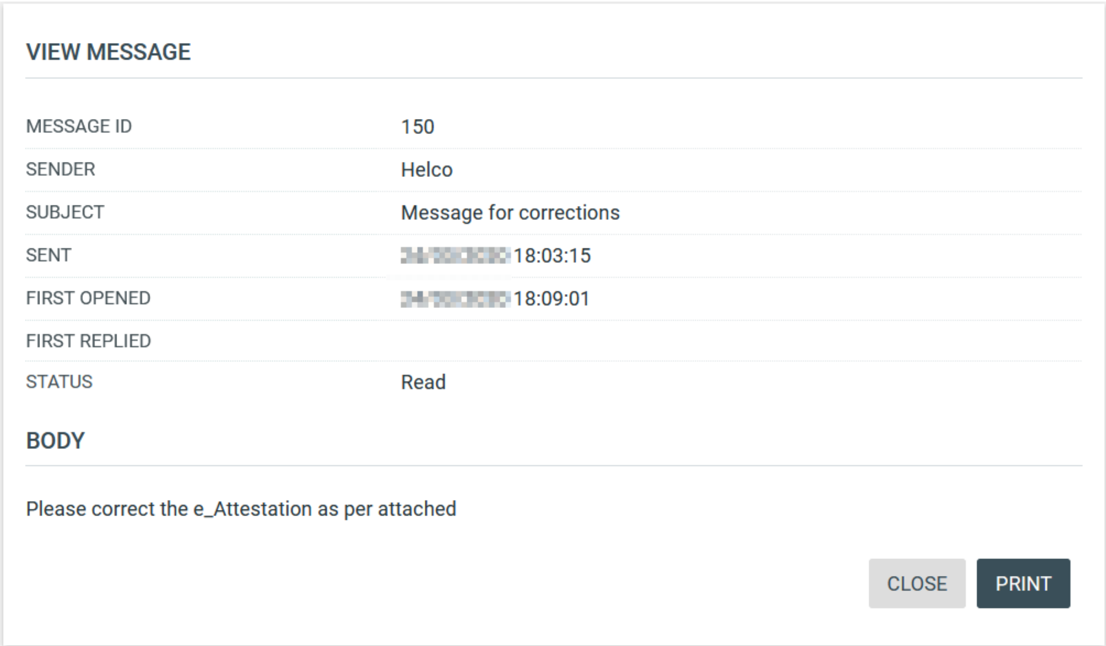


Figure 2: Response to a message

Clicking on the "**Print**" button user can download a hard copy of the current message.

10. Creation of a tender

A tender response is created by the Economic Operator and comprised the eligibility, technical and financial criteria of an Economic Operator. In order to prepare (or edit) a tender, the user needs to select the “**Tender**” option in the “**Show CfT Menu**”.

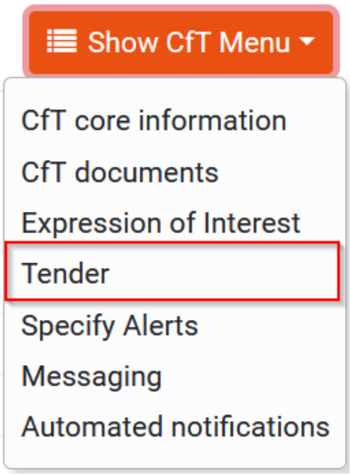


Figure 79: “Tender” option in the “Show CfT Menu”

To begin creating a tender, the user has to accept the agreement for a Call for Tender and to confirm the validity of their user details. The user clicks on the “ACCEPT & CONFIRM ALL OF THE ABOVE” button to proceed.

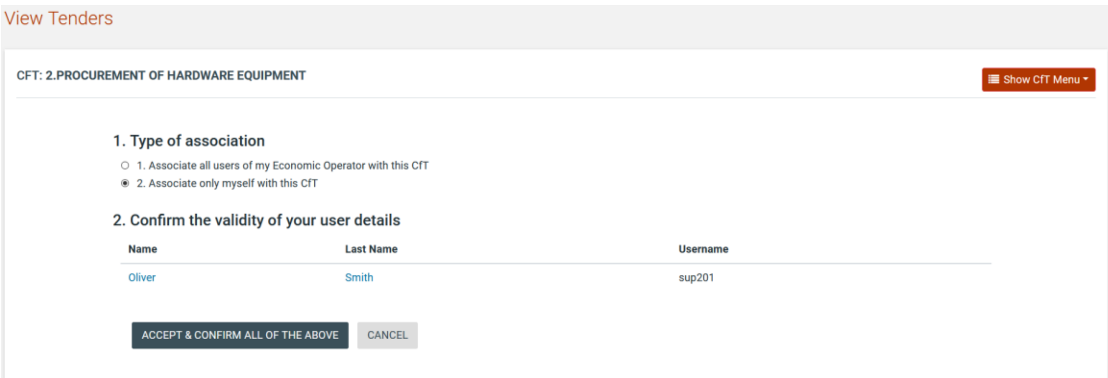


Figure 80: Accept & confirm user details

The main Tender Preparation webpage loads next (for the offline creation of a tender see section 10.2).

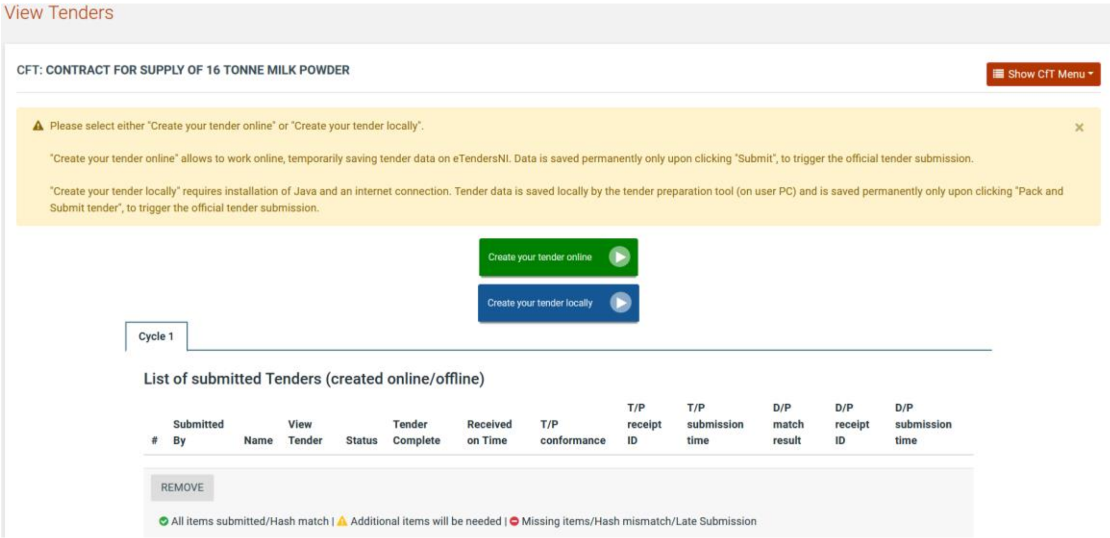


Figure 81: Main Tender Preparation webpage

Click on the “Create your Tender online” button. The two options in the screen above will only be available for tenders published before 1st September 2020 and thereafter will not be visible.

10.1. Online Tender Submission

Click on the “Create your Tender online” button.

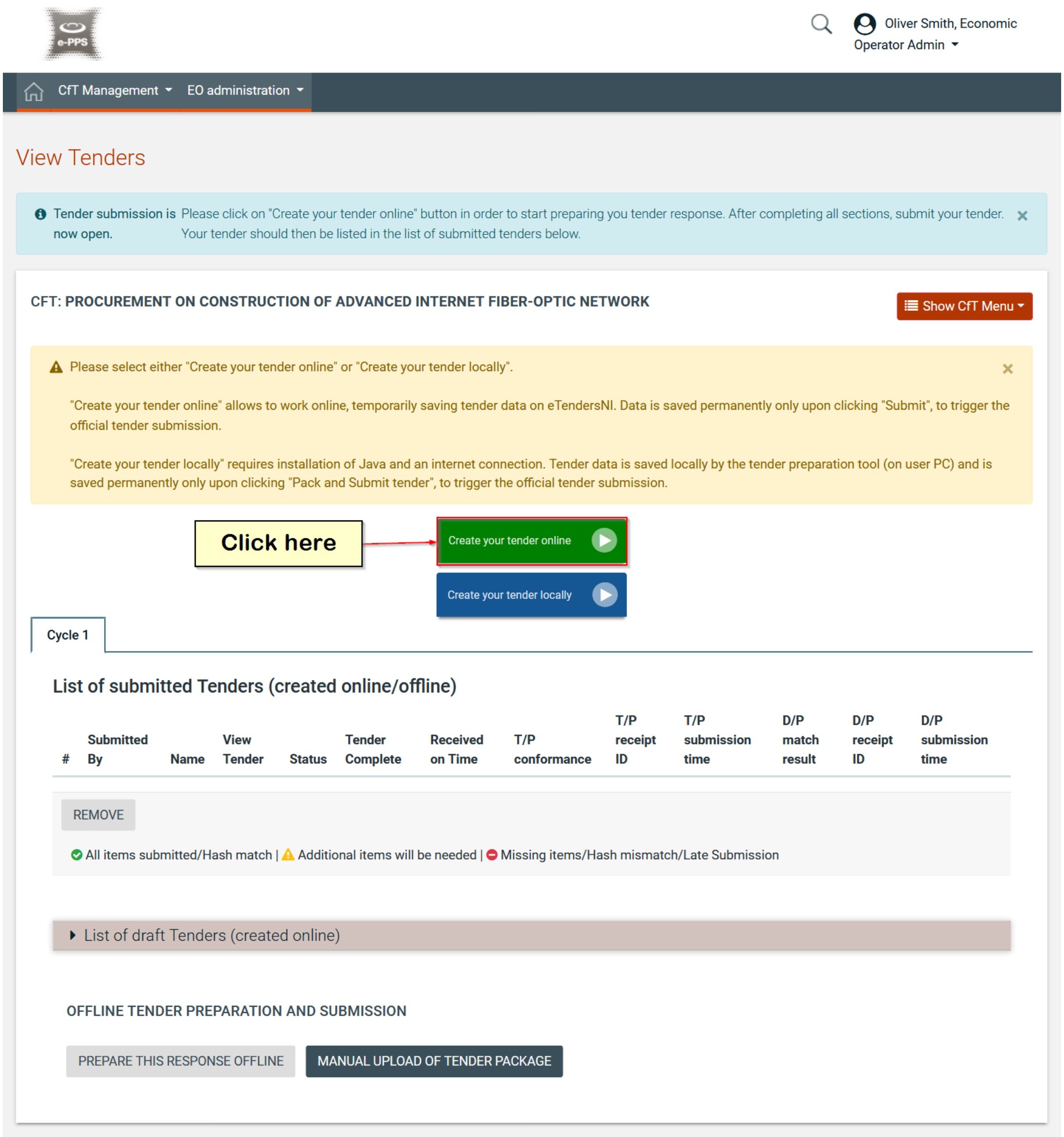


Figure 82: Click on the “Create your tender online” option

- A new browser window will open.
- Provide a meaningful title that describes your response and then click on the "Save" button to proceed. A meaningful title will make it easier for you to find and search for it in "My Responses"

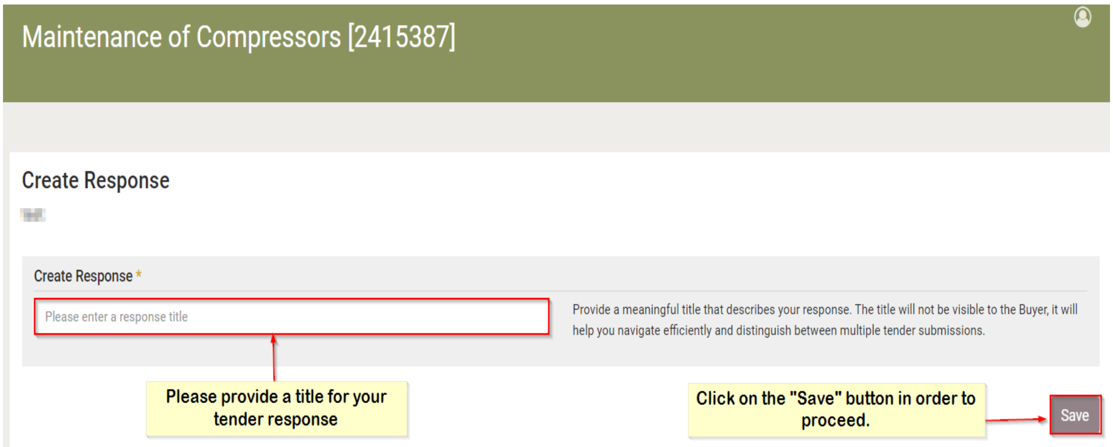


Figure 83: Main page of Online Tender Preparation

- Click on the "pencil" icon and then on the "Edit" button to start preparing your response.

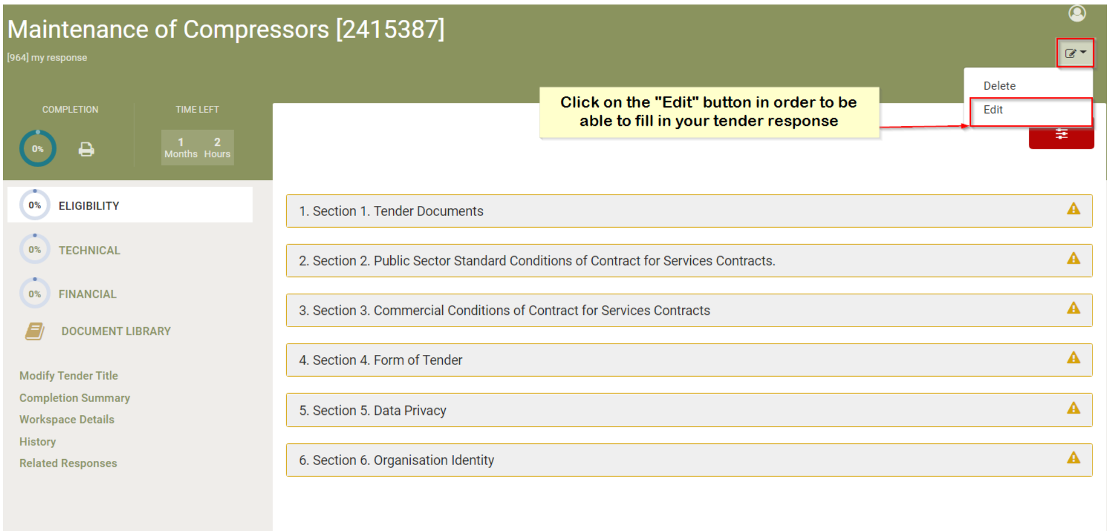


Figure 84: Preparing a tender response

Please note that you should click on the "Edit" button in order to start preparing your tender response. In case, you missed this action then you can check your tender response in read only view.

You will be required to complete questions/criteria in a number of envelopes. The number of envelopes will depend on the type of Procurement and the submission cycle. For more information on question/criterion types, please see Paragraphs 10.1.2 to 10.1.12.

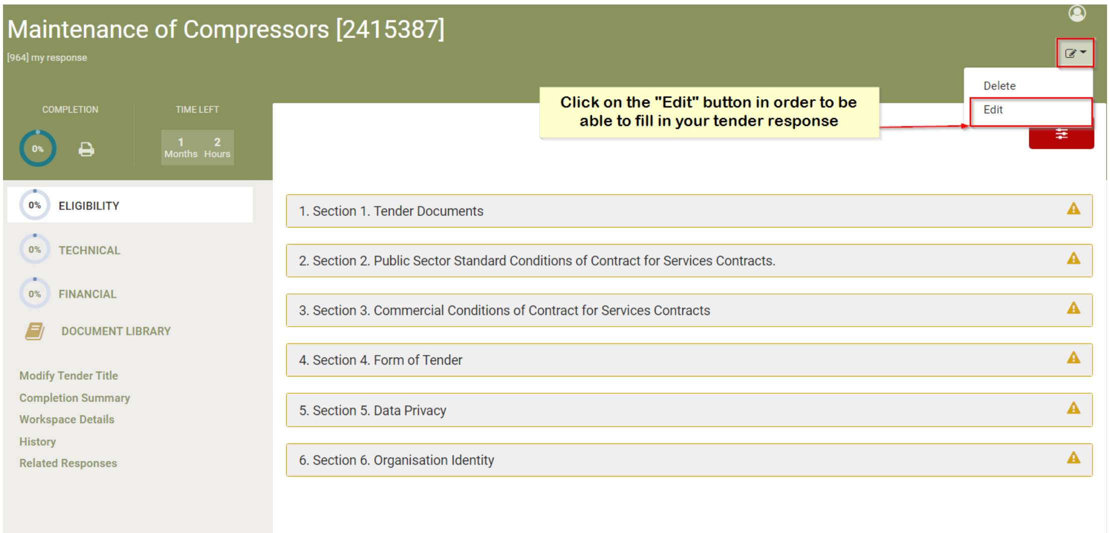


Figure 85: Start of preparing a tender response

Please note that your tender response is saved in a secure space on the eTendersNI server each time you perform an action (e.g. provide a response in a question/criterion, change section, change envelope).

This includes a Document Library area where you can upload documents you wish to form part of your submission.

Documents will remain in the Document Library until the Contract is awarded and they will then be automatically deleted.

This secure area is visible **only** to users in a Supplier's organisation who have been associated with the CfT.

10.1.1. Complete the Eligibility and the Technical Envelopes

- Click on a tab (e.g. “Eligibility”) to view the corresponding sections

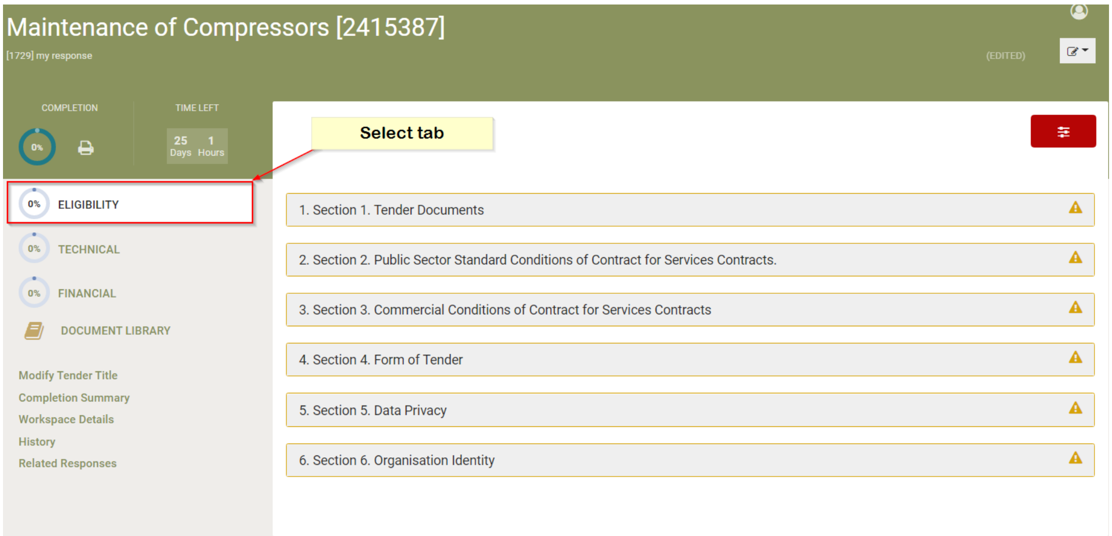


Figure 86: Eligibility envelope population

- Green ticks will appear when all Mandatory Questions/Criteria in a section have been answered. However, bidders are normally expected to answer ALL questions/criteria in a tender, even if not all mandatory. Check each question individually before submitting your tender response in order to ensure that ALL questions have been answered

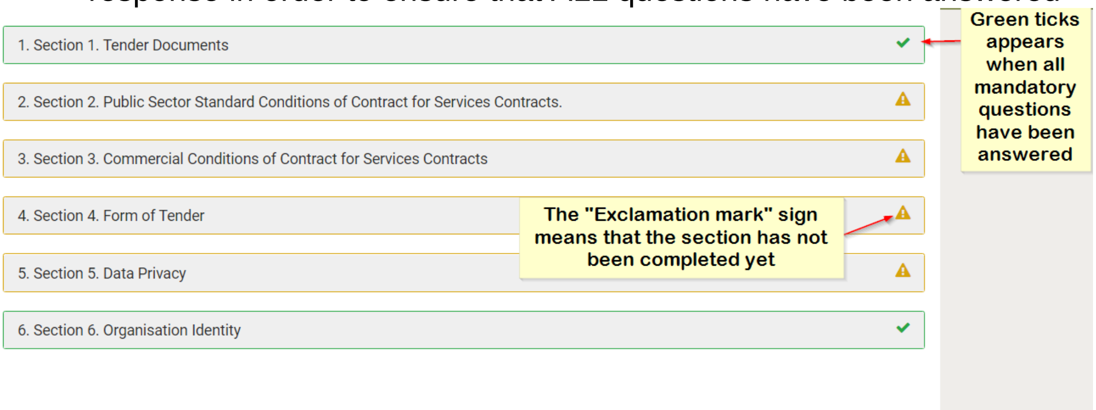


Figure 87: Completion process indication

IMPORTANT NOTE:

Please note that it is possible to save a partially completed tender response and return later to complete it – details are provided in this document.

- Click on the section name if you would like to view its contents

Figure 88: Access a section in Eligibility

- Please note that mandatory questions/criteria are indicated with an asterisk (*). A respective indication is also provided

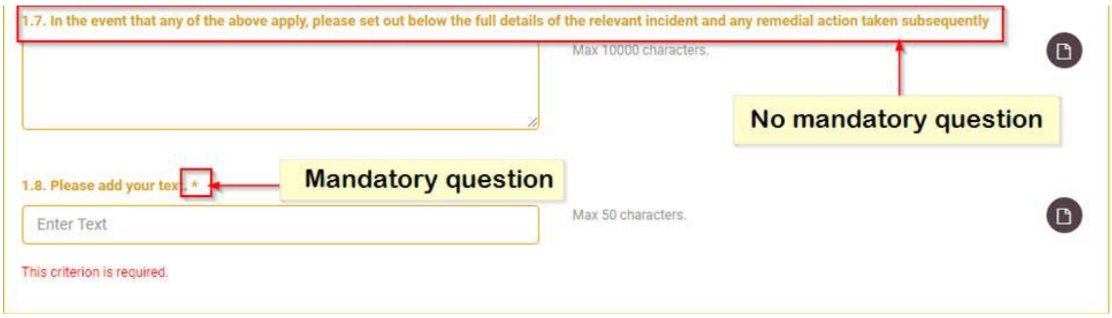


Figure 89: Mandatory indication

10.1.2. Types of questions/criteria

Please note that tender questions/criteria may have different type of responses, which have been configured by the Procurement Officer. Certain question/criteria may require selecting a "Yes" / "No" answer, others may require selecting a date using calendar functionality or simply providing a text input.

10.1.3. Question/Criterion Type: Certificate

If an eTendersNI online profile certificate is requested in the tender response, you should click on the “check box” (i.e. “I confirm that I have completed the online profile certificate and I authorise the system to use the answers I provided online in my certificate”).

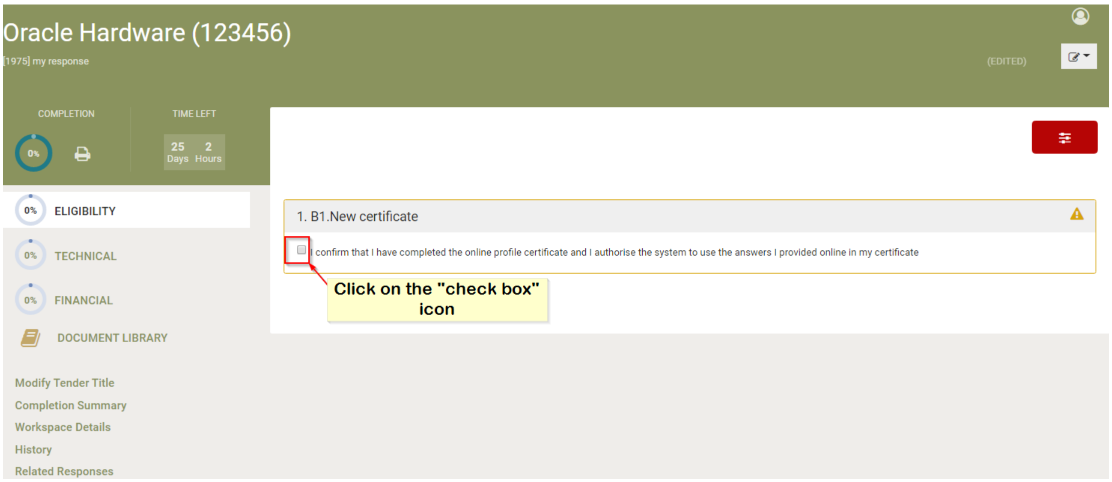


Figure 90: Completing a certificate

IMPORTANT NOTE:

- When selecting the above, you should make sure that the required certificate has been responded and completed in your organisation details. This is accessible through the “EO management” > “e-Attestations” > “Valid” page.

10.1.4. Text question/criterion

For questions/criteria of this type, the Economic Operator will provide his text answer in the displayed text box. The maximum number of characters for the Economic Operator’s answer is also displayed. The user can also attach an optional file to provide further details in his answer.

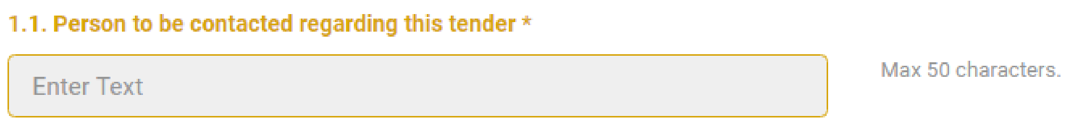


Figure 91: Text criterion

10.1.5. Number Question/Criteria

For questions/criteria of this type, the Economic Operator will provide his answer as a number in the provided box. The minimum and maximum ranges of the number are displayed along with the specified step. The user can also attach an optional file to provide further details in his answer.

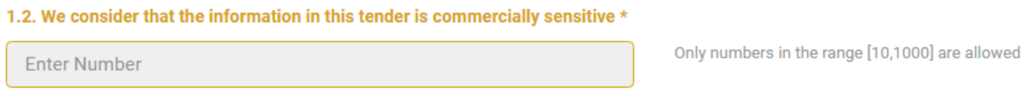


Figure 92: Number criterion

10.1.6. Text area Question/Criterion

For questions/criteria of this type, the Economic Operator will provide his text answer in the displayed text area box. The maximum number of characters for the Economic Operator's answer is also displayed. The user can also attach an optional file to provide further details in his answer.

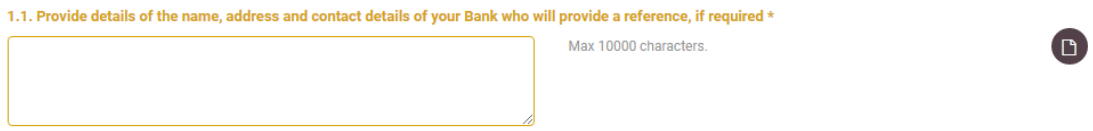


Figure 93: Text area question/criterion

10.1.7. List option question/criterion

In a list question/criterion the user should select one response based on available ones

Figure 94: List option question/criterion

10.1.8. Multiple selection list (checkboxes) question/criterion

In a multiple selection list (checkboxes) question/criterion the user should select one or more response(s) based on available ones

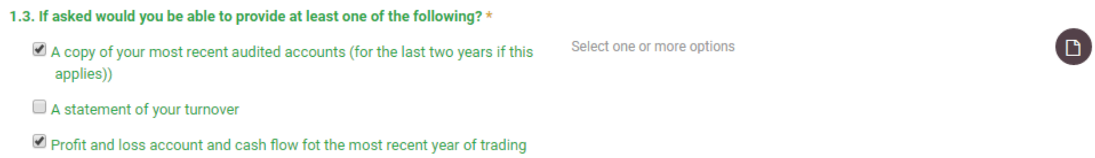


Figure 95: Multiple selection list (checkboxes) question/criterion

10.1.9. Date question/criterion

In a date question/criterion the user should select a date from the calendar based on available ones

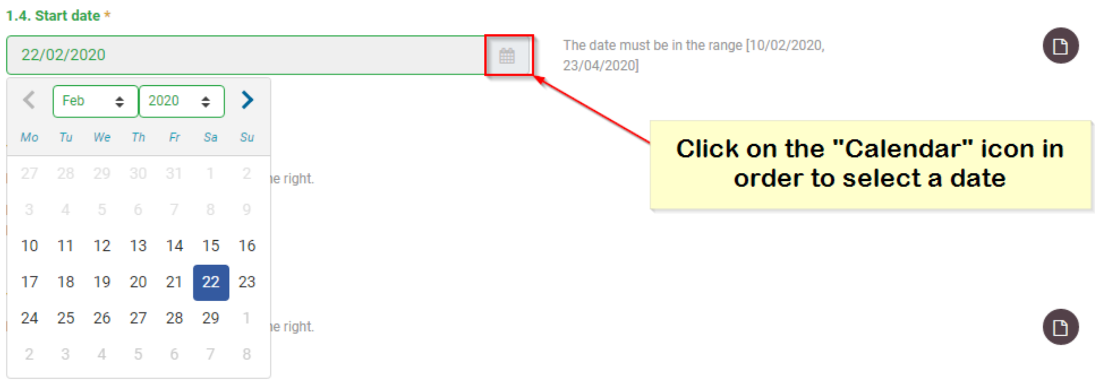


Figure 96: Date question/criterion

10.1.10. File question/criterion

In a file question/criterion the user should select a file from the document library

- When a file criterion is required click on the “Attach file” button in order to navigate to the “Document library” area.

Figure 97: Attach a file

- Click on the “Upload a new file” link in order to navigate to the “Upload files” page.

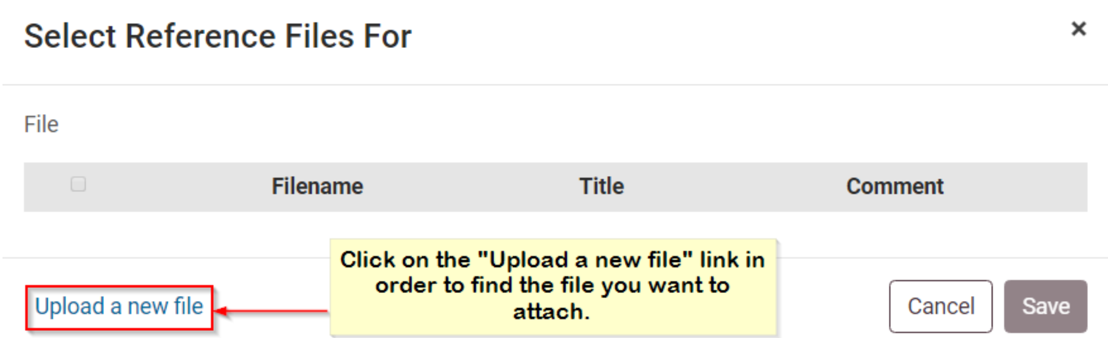


Figure 98: Upload a new file process

Please note that the maximum allowed size of all the attached files in a tender response should not exceed 100MB (i.e. < 100MB).

- Click on the “Choose file” button in order to select the file(s) from a local or network location. Please note that you may drag and drop the necessary file(s).

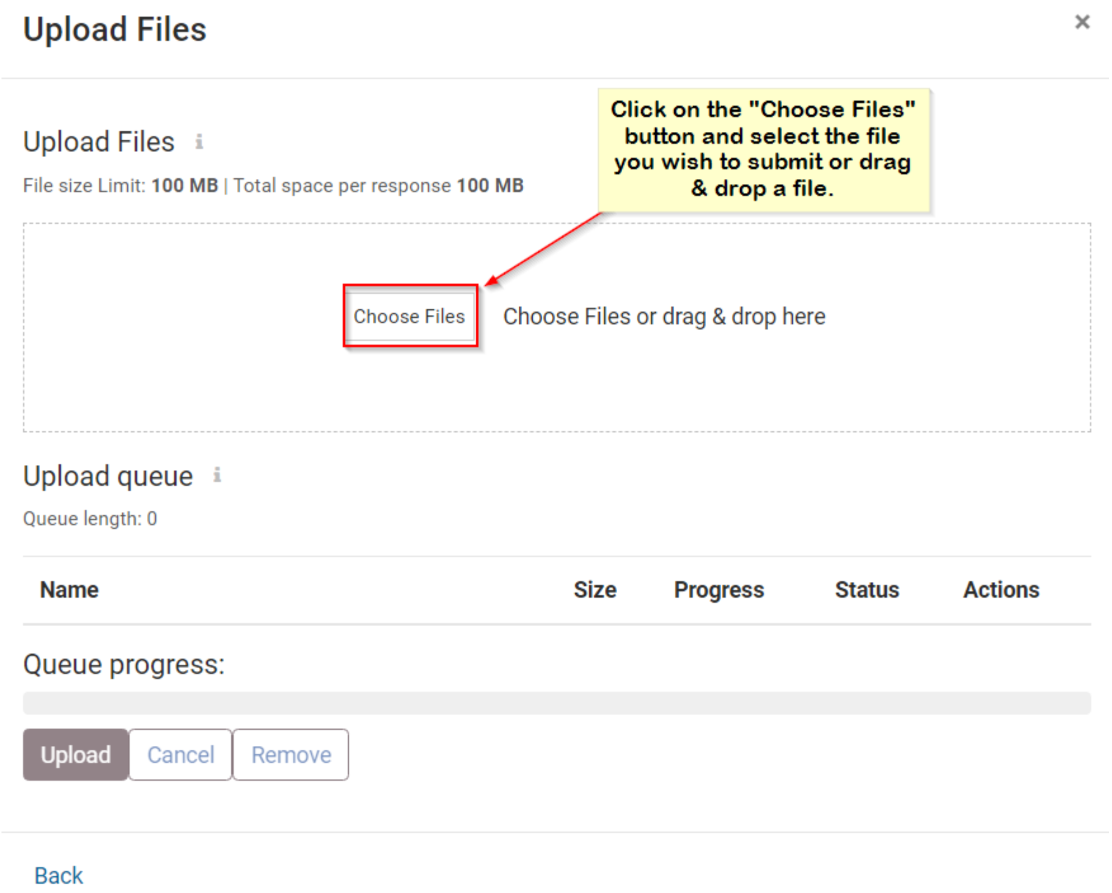


Figure 99: Upload a new file process 2

- Select the necessary file(s)

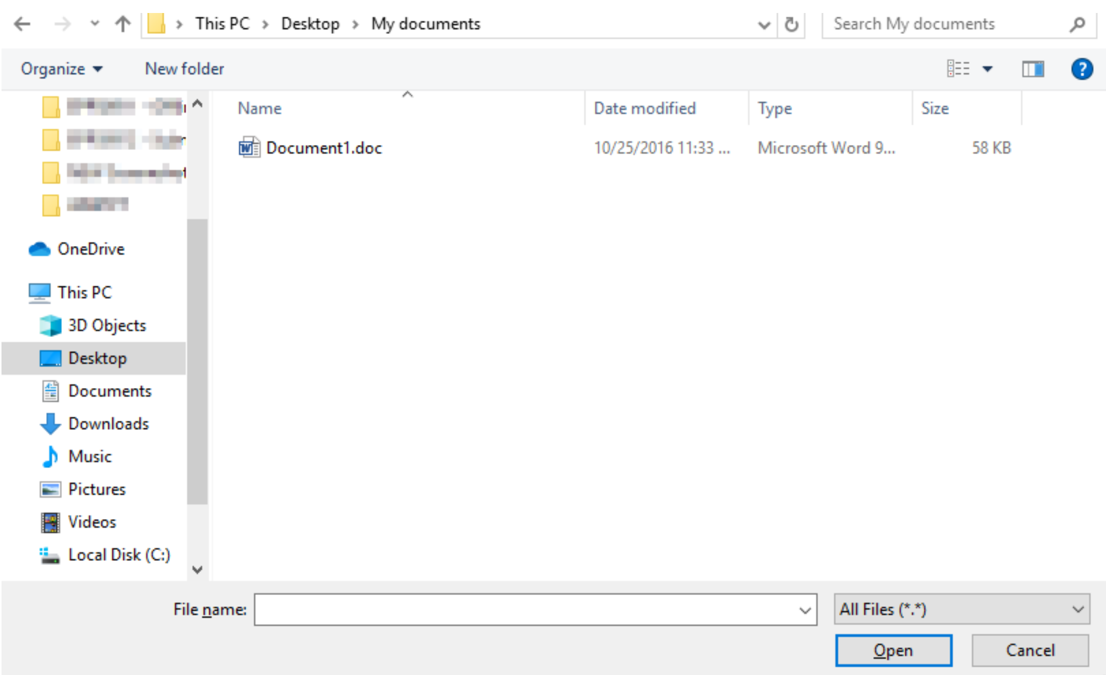


Figure 100: Select a new file from the filesystem

- Click on the “Upload” button in order to upload your file(s)

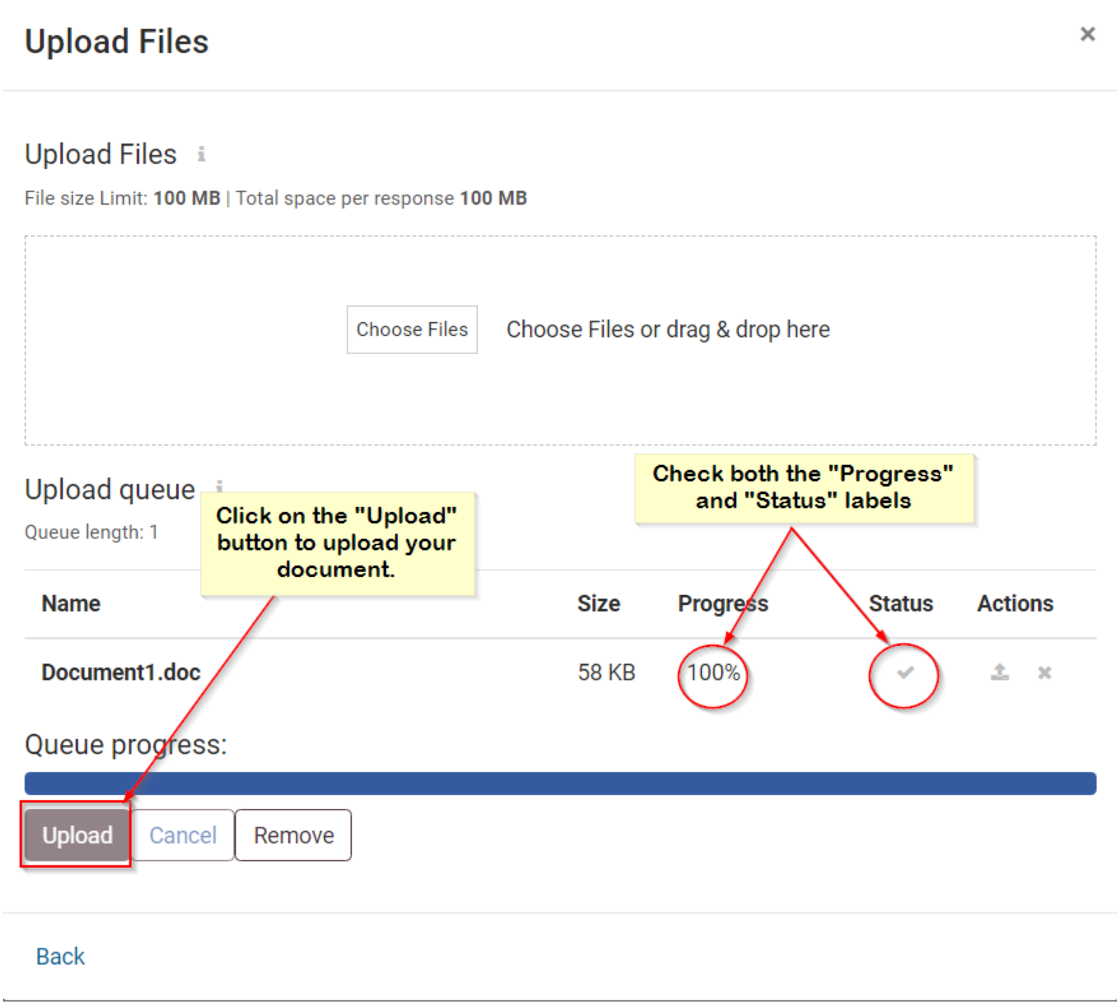


Figure 101: Upload a new file process 3

- Select the referenced file(s) for the particular question/criterion.

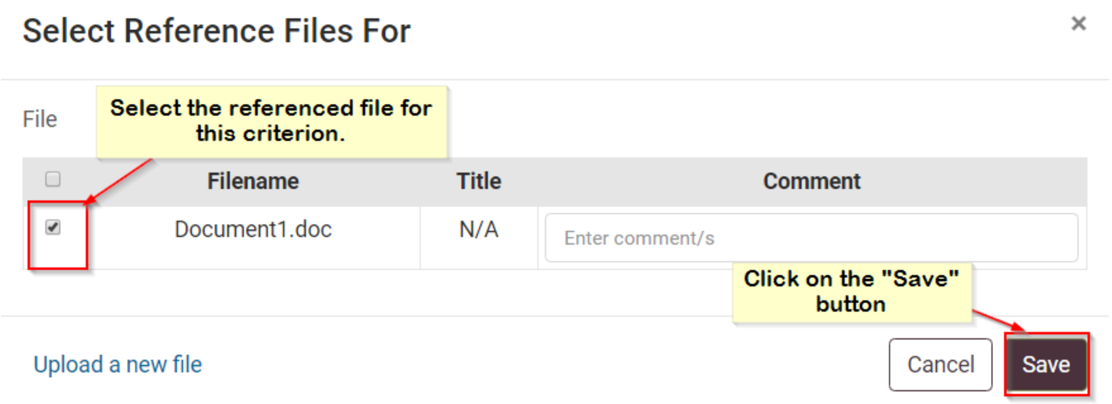


Figure 102: Associate file(s) to a particular criterion

IMPORTANT NOTE:

- Please note that you should make sure that every document is associated with at least one criterion in the "Document Library" section. **Files that are not associated with a criterion are not included in a tender submission.**

10.1.11. Optional file attachment

Click on the "Attach relevant document" icon if you wish to upload a document or file related to your response in a criterion.

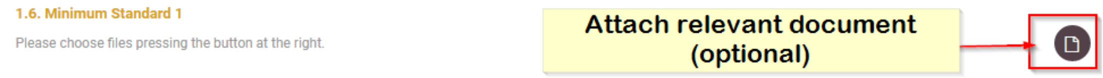


Figure 103: Optional file attachment

Please note that the maximum allowed size of all the attached files in a tender response should not exceed 100MB (i.e. < 100MB).

10.1.12. Supplier Read Only Question/Criteria

The user can view the existence of the question/criterion in the tender, but the scoring will be provided directly by the evaluators.

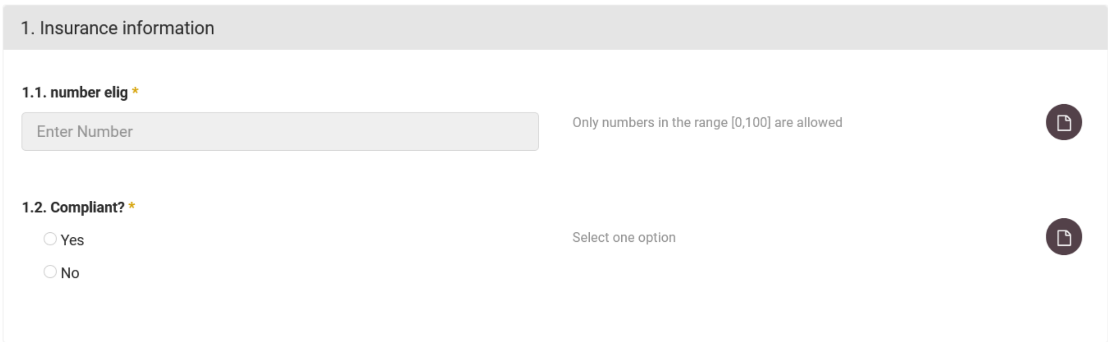


Figure 104: Supplier Read Only Question/Criterion

10.1.13. Complete the Financial Envelope

After you have completed the Eligibility and Technical envelopes, fill in the financial envelope. The system displays all financial and TCO criteria for the tender requirements.

The user completes the column "**Value**" and specifies an optional discount in the "**Overall discount**" section. The "**Overall discount**" section is enabled only if the associated procurement officer has specified that discounts are permitted for the Call for Tender.

The “**Present Value**”, the “**Discounted Present Value**”, and the “**Totals**” are automatically calculated by the system.

The values expected in the financial envelope are currency values, hence only numeric values are allowed in this envelope.

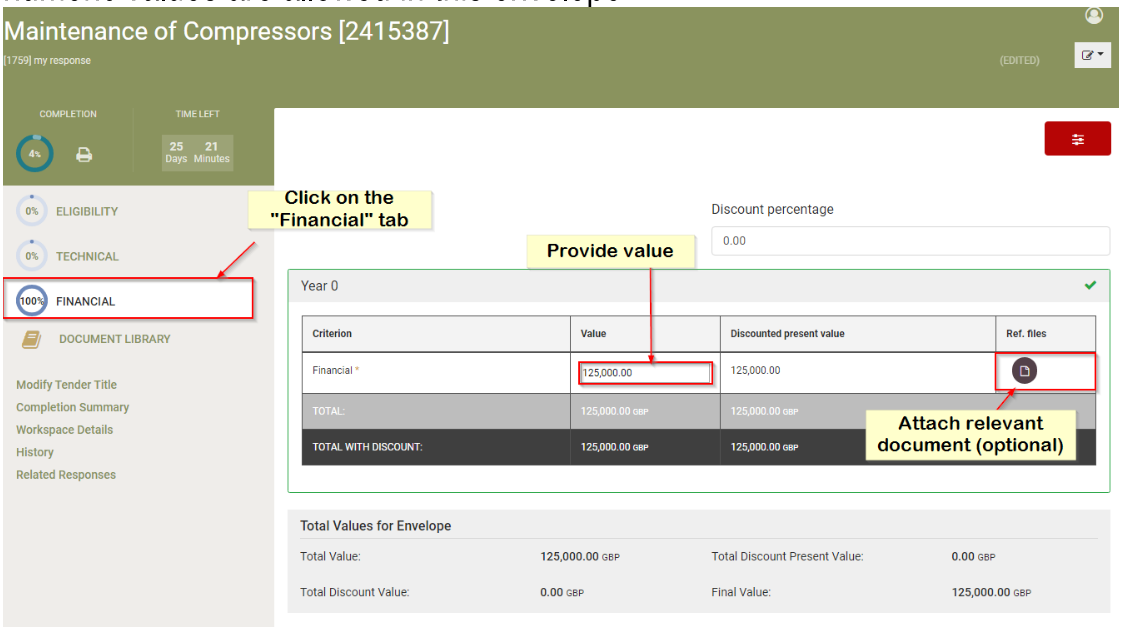
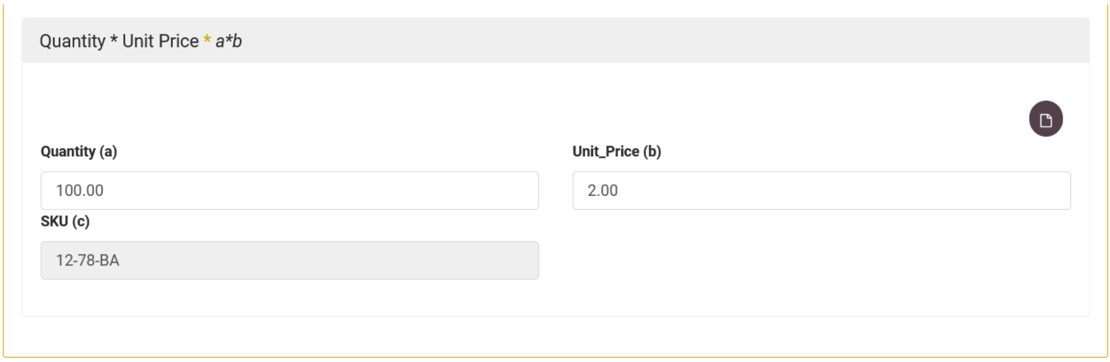


Figure 105: Complete financial envelope

Regarding the TCO, the supplier fills in the requested values according to the specifications for the financial proposals.

In the example below it is required for suppliers to declare the number of goods they will deliver (TCO Attribute: Quantity), and the price per unit (TCO Attribute: Unit_Price). The coordinators have setup calculation formulas that in the background provide them with the proposed financial values.



Figures 106: TCO criterion

10.1.14. Validate tender response

The visual progress indicators display graphically the progress of each tab (envelope’s progress pie) as well as the progress of the tender response in total (total progress pie).

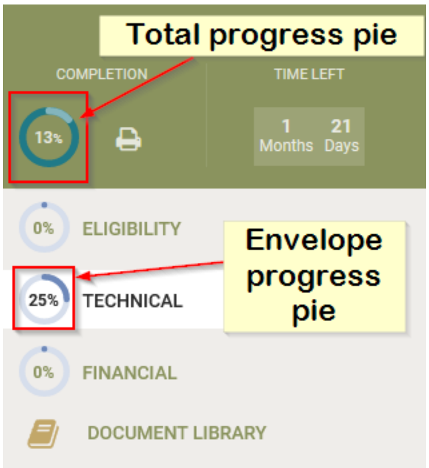


Figure 107: Progress pies

In addition, you may validate your tender by clicking on the "Completion Summary" option from the left-hand menu.

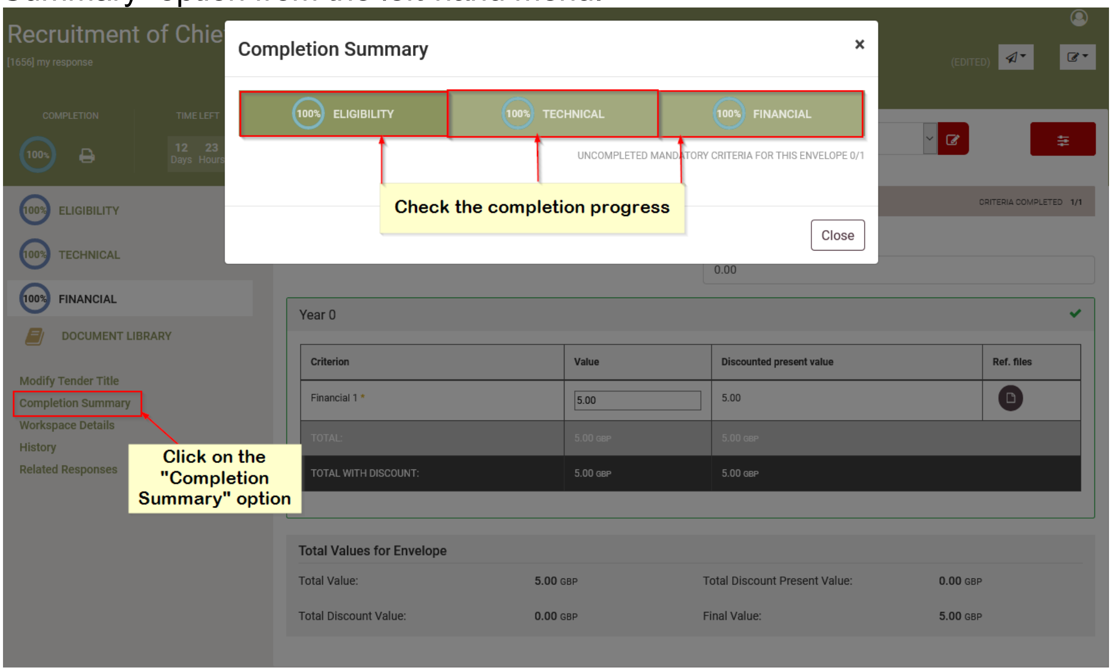


Figure 108: Completion summary

10.1.15. Save a tender response

At any time you may save a partially completed tender and return later to complete it.

Wen preparing your reponse online, your provided values are saved automatically every time you perform an action.

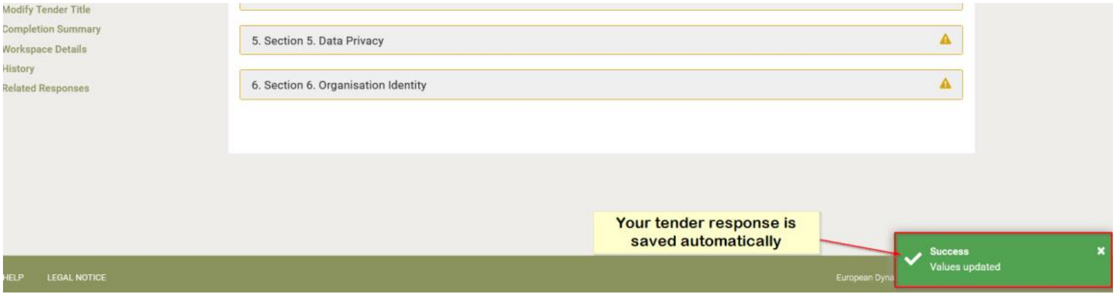


Figure 109: Automated saving process

All saved draft versions are saved on eTendersNI servers. However please note that the only tender document(s) that a Contracting Authority can ever see are those officially submitted by the company at the final phase of the tender submission process (after the submission report is generated). These files become accessible to the procurement Officer, only <u>after</u> the tender opening ceremony.

10.1.16. Edit a draft tender response

In order to edit a draft tender previously saved as described above, you may follow the below steps:

- Access the "Tender" page through clicking on the "Tender" option in the "Show CfT Menu".

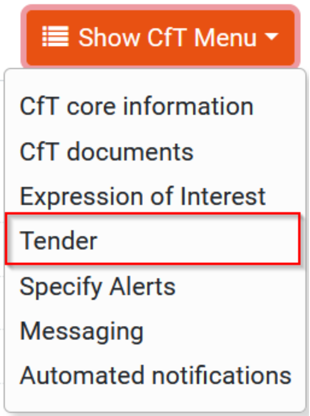


Figure 110: Access a draft tender response

- Select the saved tender response from the "List of draft Tenders" and click on "Edit".

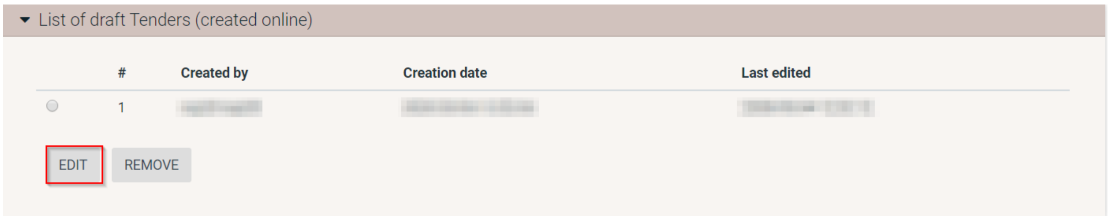


Figure 111: List of draft tenders (created online)

Please note that in order for a second user (apart from the creator) to access a draft tender response; user should access the WEBTPT application and then locate it.

10.1.17. Submit a tender response

After having providing a response to all the required questions (**100% Completion**), you can submit a tender response on the e-Tendering system simply by clicking on the "**Submit**" icon.

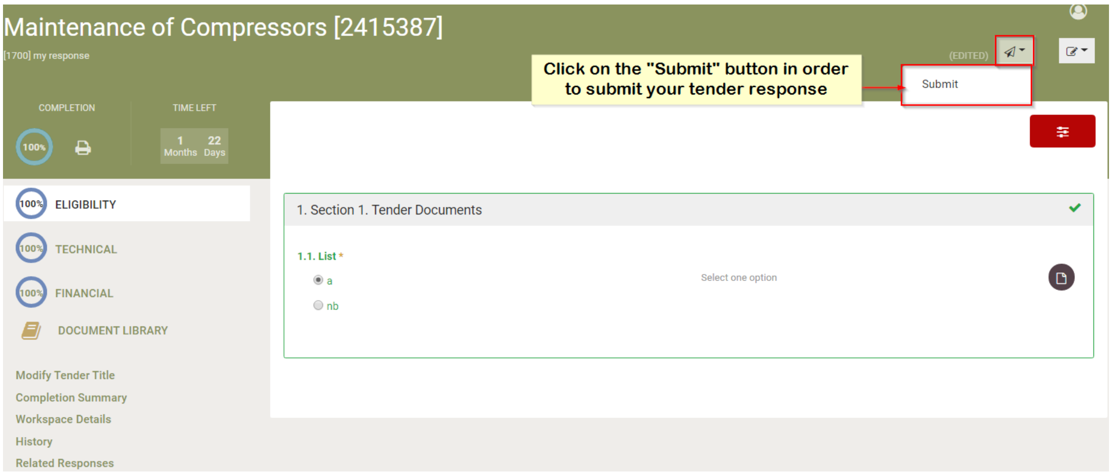
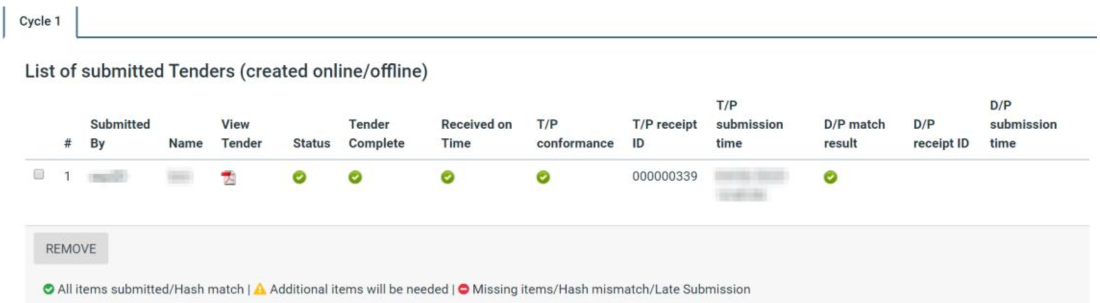


Figure 112: Submit a tender response

Once the tender has been submitted it will appear in the List of submitted tenders. Please ensure that **all entries have a green tick**. If any of the boxes do NOT show a green tick, there is something wrong with your tender submission. We advise that you contact the Supplier Helpdesk for assistance, as this will result in a failed tender submission.


Cycle 1

List of submitted Tenders (created online/offline)

#	Submitted By	Name	View Tender	Status	Tender Complete	Received on Time	T/P conformance	T/P receipt ID	T/P submission time	D/P match result	D/P receipt ID	D/P submission time
1								000000339				

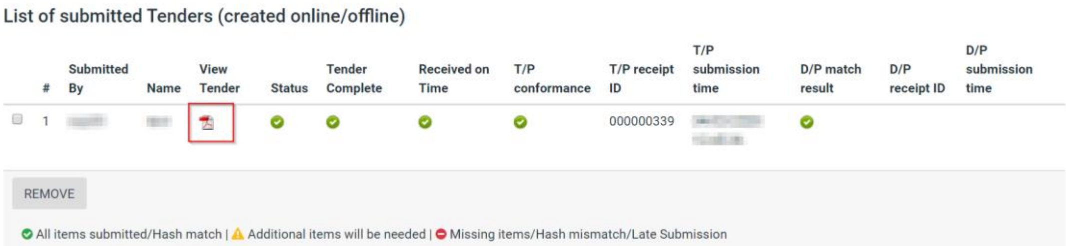
REMOVE

All items submitted/Hash match | Additional items will be needed | Missing items/Hash mismatch/Late Submission

Figure 113: List of submitted tenders (created online/ offline)

In addition, upon successful submission an e-mail notification is dispatched to your email address. Please note that the email notification **simply acknowledges the receipt of the file** you submitted on the e-Tendering system and it is not a confirmation of a correct tender submission. Even if the submitted file is non conformant, the automatic notification will be dispatched to your address if the file data is uploaded successfully.

Following the Submission, the tender appears in the List of Submitted Tenders, with a Tender Receipt ID. For a printout of the submitted tender, click on the .pdf icon available to the "View Tender" column.


List of submitted Tenders (created online/offline)

#	Submitted By	Name	View Tender	Status	Tender Complete	Received on Time	T/P conformance	T/P receipt ID	T/P submission time	D/P match result	D/P receipt ID	D/P submission time
1								000000339				

REMOVE

All items submitted/Hash match | Additional items will be needed | Missing items/Hash mismatch/Late Submission

Figure 114: Tender PDF – Hard copy of the submitted tender response

Please use the conformance checks and the .pdf printout of your submitted tender response to check that there is nothing wrong with your tender submission. The .pdf printout provides an opportunity for you to check that you have included responses to each question and attached the correct files where required.

If you notice that there is an error in your tender submission, you will need to prepare another response and correct the error. The previous submitted tender cannot be edited after it has been encrypted.

IMPORTANT NOTE:

- **In order to ensure a successful Tender Submission**, please pay attention that the visual indicator shows 100% Completion, before clicking on “Submit”.
- **After selecting “Submit” please check your tender conformance, which is confirmed by 5 green ticks in the above screen.** Non-conformant tenders will not be accepted and are highlighted with 1 or more red ticks in the above screen.

10.2. The offline Tender Preparation Tool

The functionality to create the tender is also supported using an offline Tender Preparation Tool.

10.2.1. Setup offline Tender Preparation Tool

In order for the user to prepare his tender response locally in his PC, the following steps need to be performed:

1. Download the tender preparation tool in a local environment (click on the "**PREPARE THIS RESPONSE OFFLINE**" button). The tool may also be downloaded by the relevant link of the left-hand menu or
2. Download the tender structure in a local environment (click on the "**Download Tender Structure**" button) and open it only through importing it first through the offline Tender Preparation Tool

Please, note that the "tender structure" files are unique and created for each Call for Tender. The Economic Operator user has to make sure that the downloaded tender structure corresponds to the Call for Tender he/she intends to participate in. Otherwise the tender package generated through the tool, based on the wrong tender structure, will not be consistent to the tender material requested by the Contracting Authority and may result in disqualification of the supplier.

It is strongly recommended that suppliers intending to use the offline Tender Preparation Tool should download the Tender Preparation Tool before commencing the preparation of a tender response, even if they have already downloaded and stored locally an older version of the tool in the near past. As such, it will be safeguarded that suppliers will enjoy the most up to date benefits, features and enhancements of the Tender Preparation Tool.

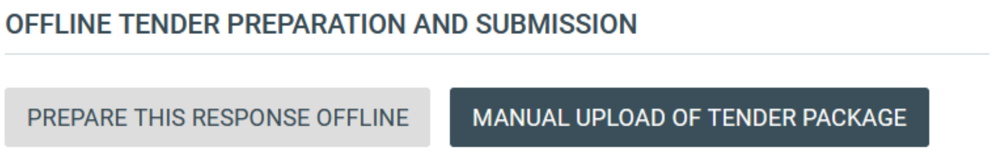


Figure 115: Download Tender Preparation Tool from a Call for Tender

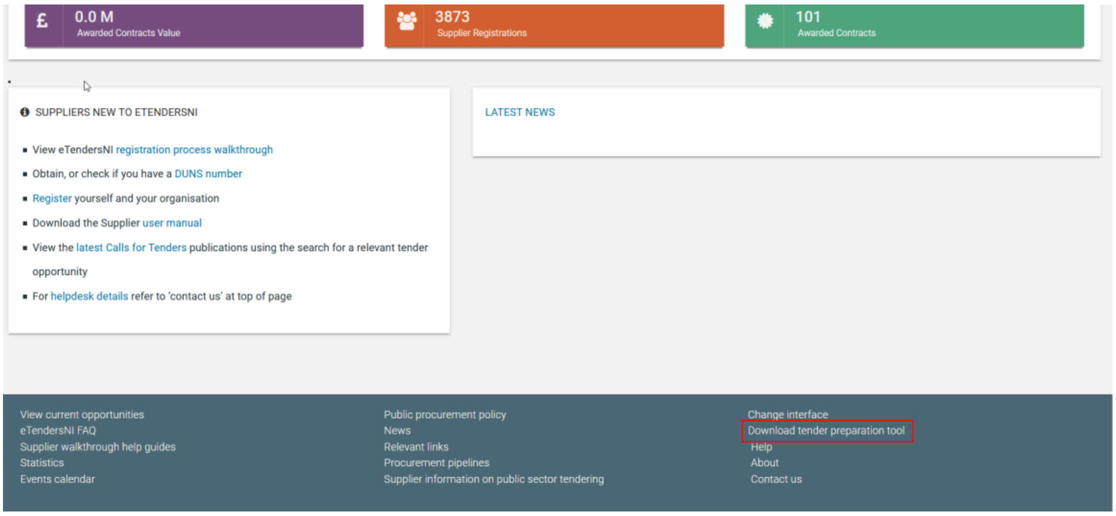


Figure 116: Download Tender Preparation Tool – non authorised user

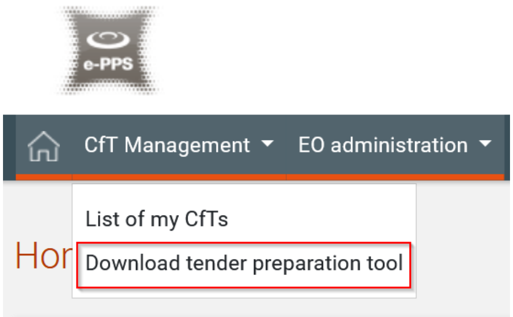


Figure 117: Download Tender Preparation Tool –authorised user

3. Upon clicking the above links, the system will prompt the end-user to save a zip file named "TenderPreparationTool.zip" in a local directory. The zip should be saved anywhere convenient for the supplier user (preferable on Desktop)

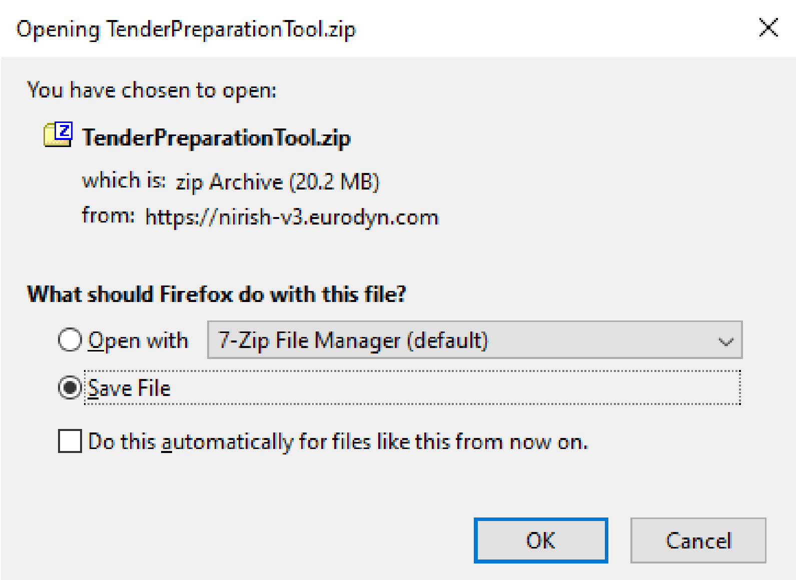


Figure 118: Save offline Tender Preparation Tool

The tool does not require installation, however needs to be stored in a local workstation directory, or on a network drive that is mapped to function as a local directory.

Following the saving of the file, the user must uncrompress the zip file, and save the extract at the desired destination.

4. To open the Tender Preparation Tool, the user must open the directory where the decompressed folder is and then open the "TenderPreparationTool.exe" file for Windows OS, or "TenderPreparationTool.jar" for Mac OS

Name	Size	Packed Size	Modified
lib	14 886 351	13 245 394	[illegible]
TenderPreparationTool.exe	36 864	15 052	[illegible]
TenderPreparationTool.jar	1 066 551	916 958	[illegible]

Figure 119: Tender Preparation Tool OS options

5. Use the button 

to open the stored XML structure

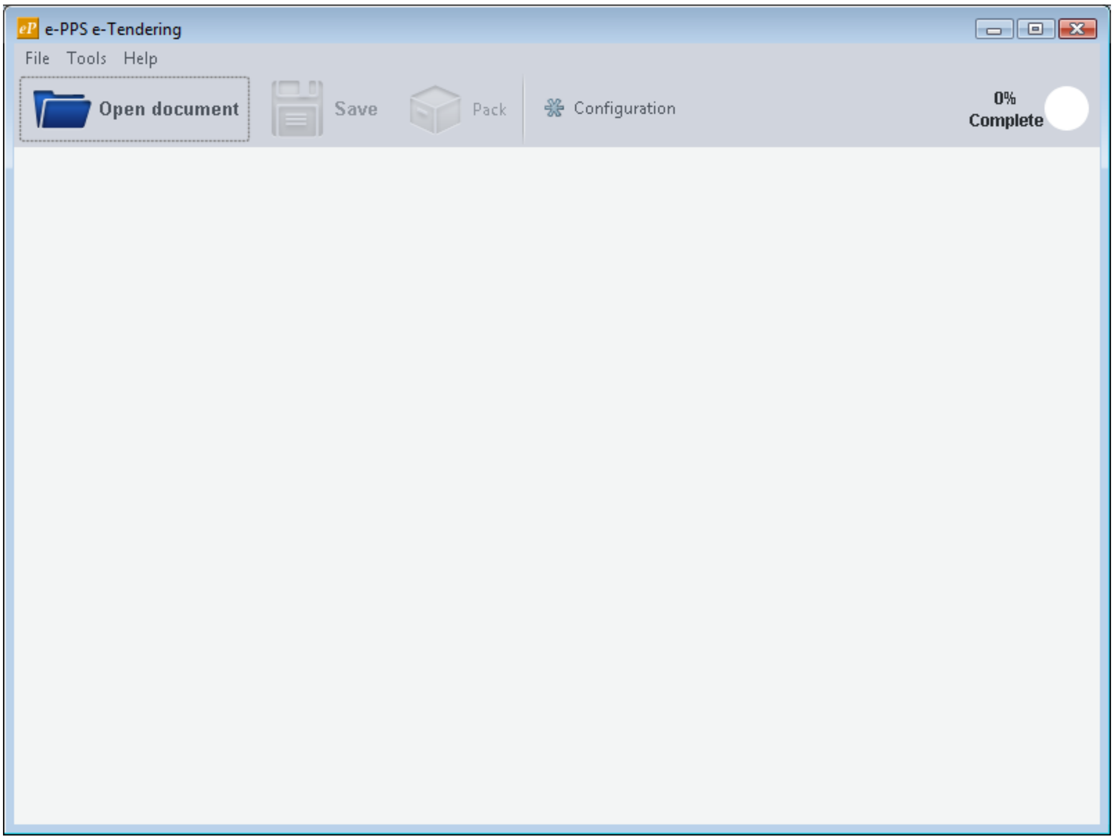


Figure 120: The offline Tender Preparation Tool

6. Select the tender structure XML file downloaded together with the Tender Preparation Tool or through the “CfT documents” section of a Call for Tender, and open it

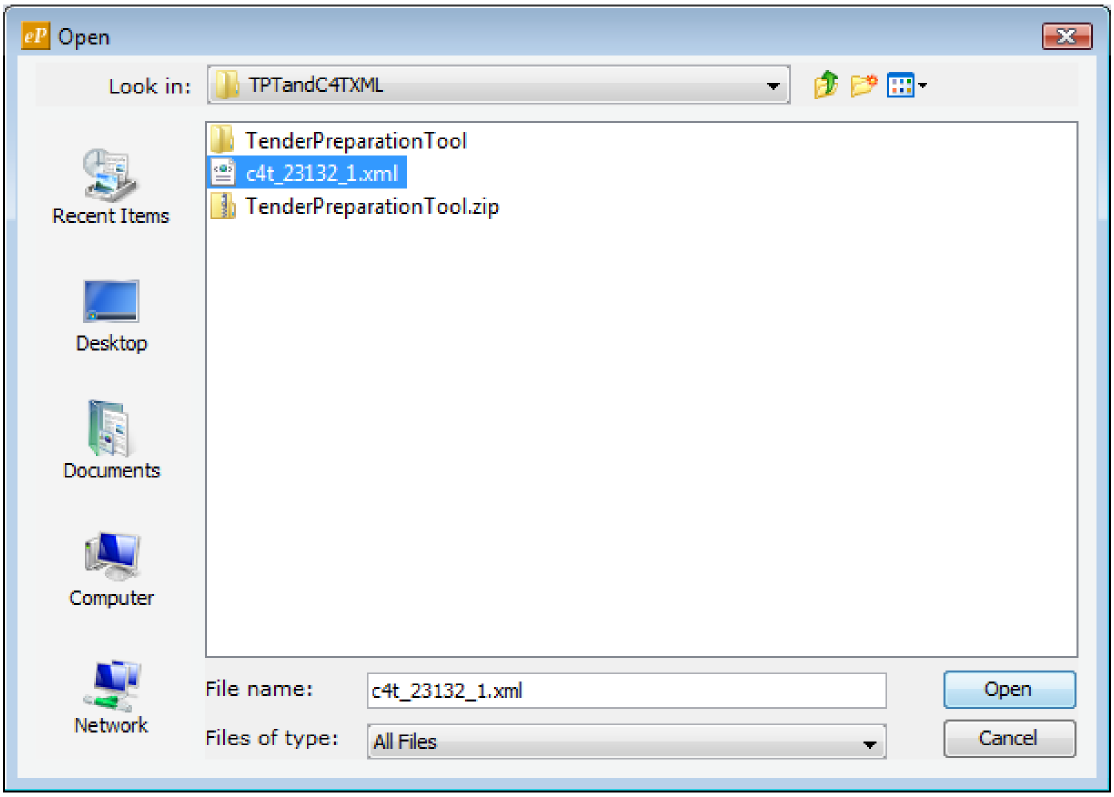


Figure 121: Import tender structure

7. Complete the tender by filling all sections in all envelopes as described in section 10.2

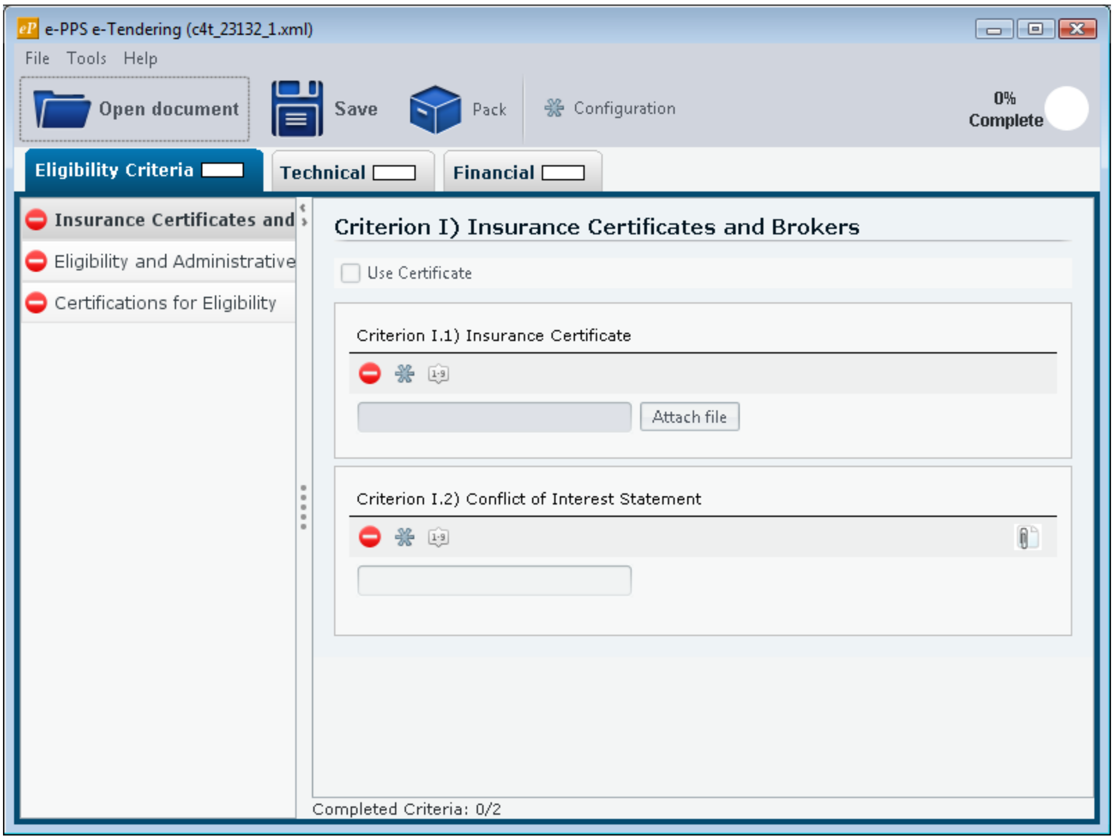


Figure 122: Offline Tender Preparation Tool with Imported Tender Structure

10.2.2. Save & Pack Offline a Tender Package

At any time the supplier can click on the 

button to save a partially completed tender, and return later to complete it.

The supplier next selects a known folder, provides the name for the tender response, and click on the “Save” button.

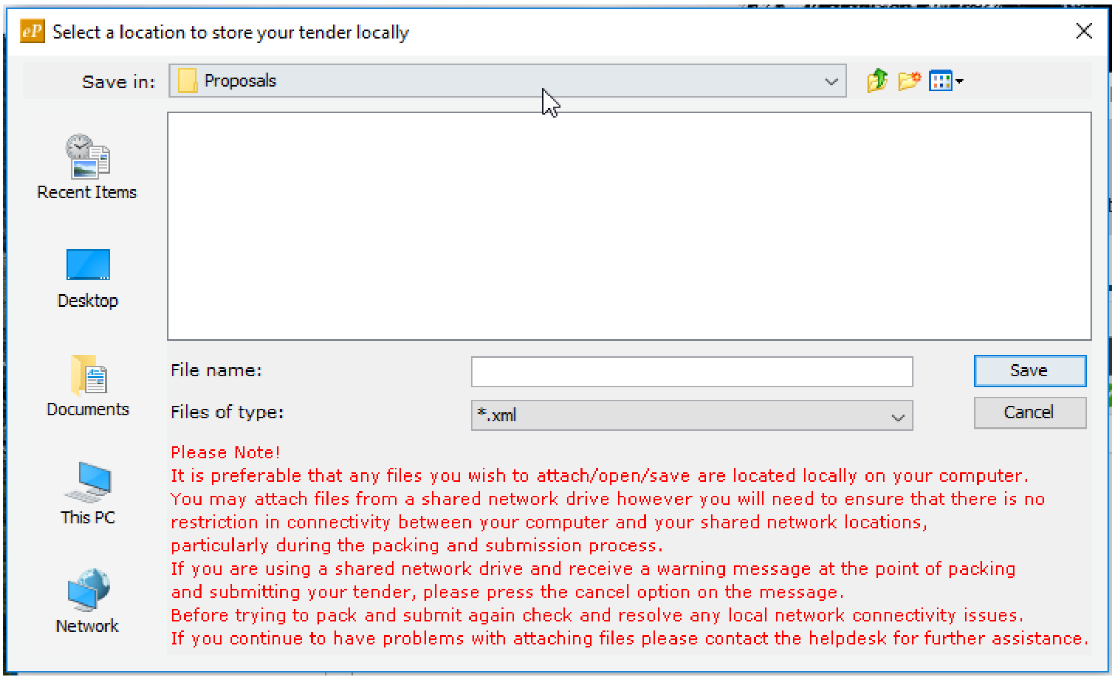


Figure 123: Save offline Tender Package

The supplier should make sure they select a known folder to save your tender response (e.g. "Desktop", "My Documents", etc.). The default saving location is often a temporary folder, and if your tender response is saved there, the operating system may delete it automatically.

All saved draft versions are saved on the supplier's workstation, and not on eTendersNI servers. The Tender Preparation Tool prompts the supplier to select a location to save the tender response only in the first time they save; following that saving takes place automatically in the location originally selected without prompting the user to select the location again.

In case the supplier wants to save the tender response to a new location, they may use option "**File > Save as**" instead.

Following the successful saving, the supplier packs the tender through clicking on 

button.

The successful packaging generates a file with suffix "**_TENDER.zip**".

10.2.3. Submit a Tender Package prepared offline

In order to submit the tender packaged prepared offline, the user needs to navigate to the "Tender" page (e.g. "Show CfT Menu" > "Tender" option) and select the button "**Manual Upload of Tender Package**"

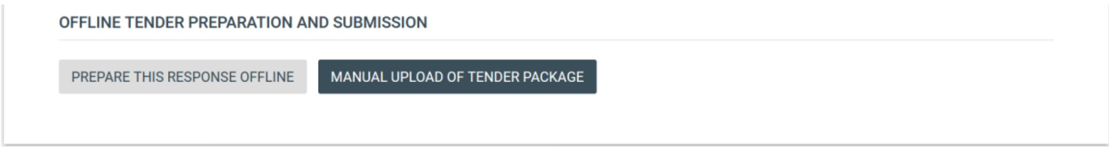


Figure 124: Manual Upload of Tender package

The user is prompted to locate the tender package to upload. The user selects the “**Browse**” button to locate the file of the tender package.

The tender package is the archive (the name of the archive contains “**_TENDER.zip**” at the end) which has been created during the “**Pack**” operation.

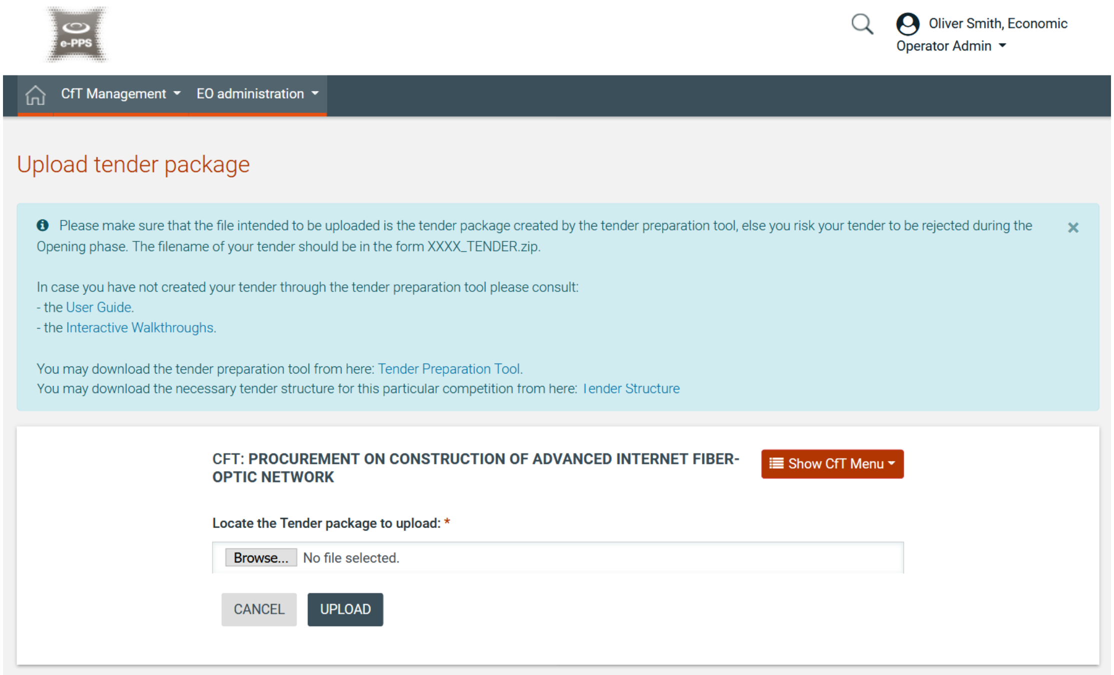


Figure 125: Upload Tender Package page

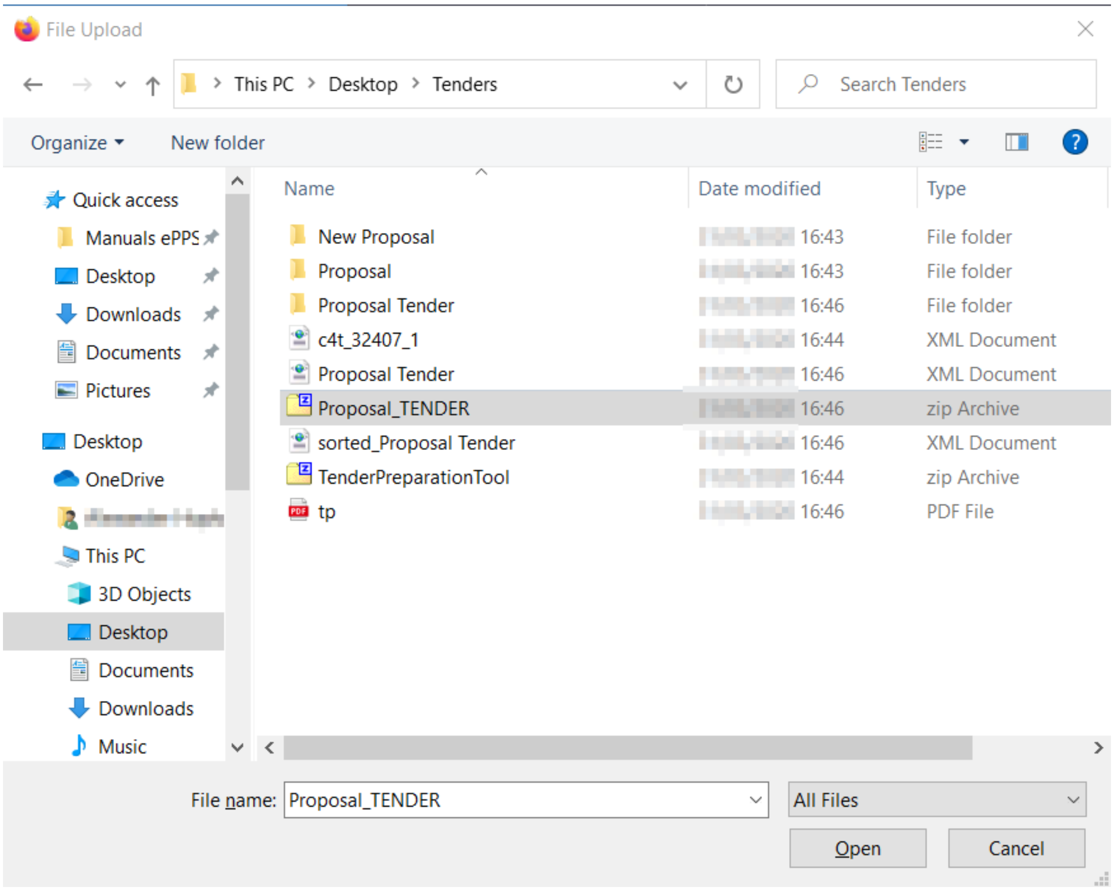


Figure 126: Selection of the Tender Package to upload

In order to complete this action, the user selects the button "**Upload**" to upload the tender package in the platform.

In order for the tender package submission to be completed successfully, the whole tender package must be uploaded before the tender submission deadline. In case the Call for Tender closing date is reached while the user's tender submission is in transit, upon completion of the tender submission, the tender will be rejected by the system.

The user will be able to upload a valid tender, even though his organisation registration is pending for approval by the SA user. In such cases, the user is informed with a message upon the completion of the tender upload, that the registration of his organisation is pending and that his tender response might be rejected.

11. Electronic Auctions

The e-Auction module provides all necessary functionality for the Economic Operators to participate in a live auction event for a particular Call for Tender. In order to participate in the auction events, the Economic Operators must be invited by the contracting authority user who coordinates the specific Call for Tender.

11.1. Participation in an e-Auction event

In order to respond to an e-Auction invitation the user needs to select the task "**Respond e-Auction Invitation**" available to their list of tasks.

Figure 127: Respond to an e-Auction invitation

The user has the option to "I **Accept to participate in the e-Auction event**" or to "I **Decline to participate in the e-Auction event**". The system informs the user regarding acceptance/ rejection decision.

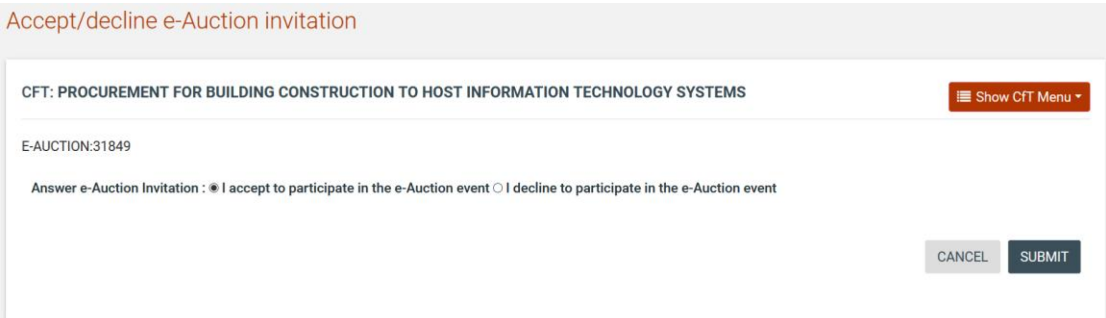


Figure 128: Accept an invitation to participate in an e-Auction event

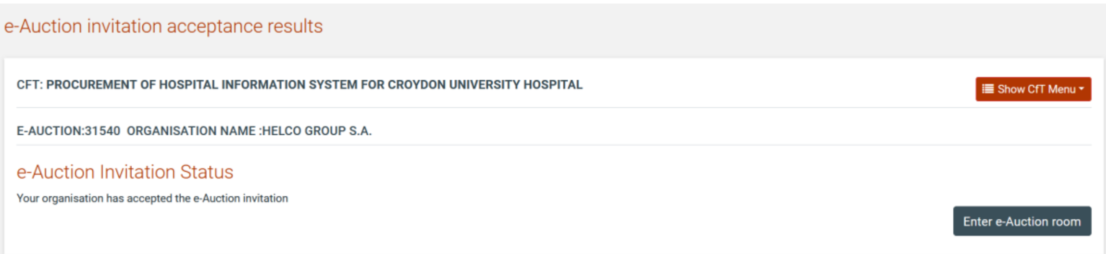


Figure 129: e-Auction invitation acceptance results (accepted invitation)

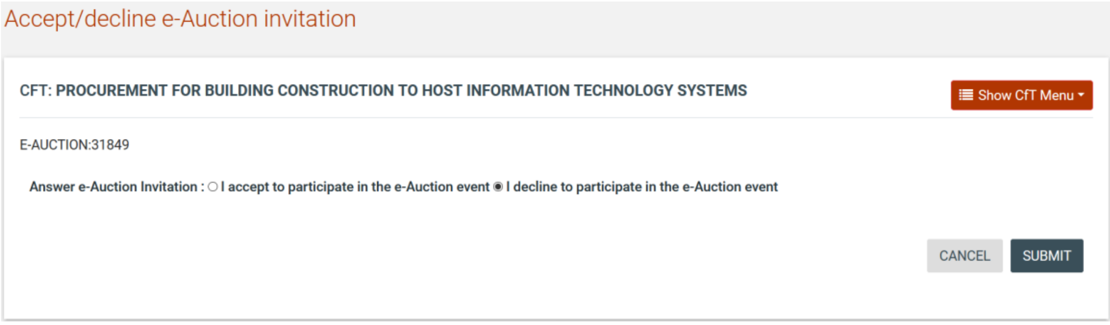


Figure 130: Decline an invitation to participate in the e-Auction event

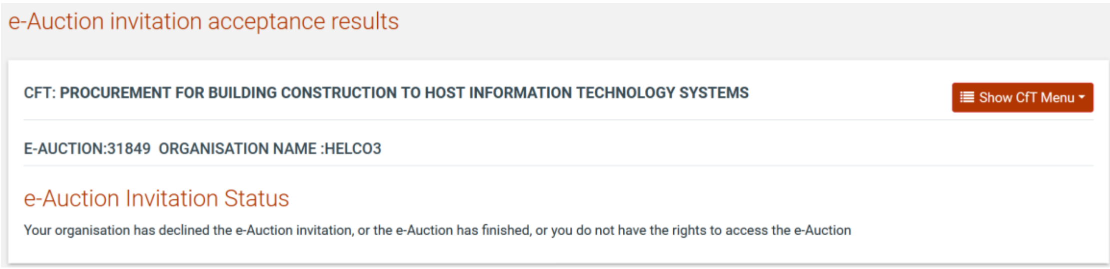


Figure 131: e-Auction invitation acceptance results (declined invitation)

It is important the user to accept the invitation at least 30 minutes before the e-Auction start date, otherwise will not be able to accept the invitation and participate in the e-Auction event. The start date of the auction is available in the Auction's details.

In order to participate in the auction event, the user needs to enter the e-Auction room. This functionality is accessible from the "**e-Auctions**" option of the "**Show CfT Menu".**

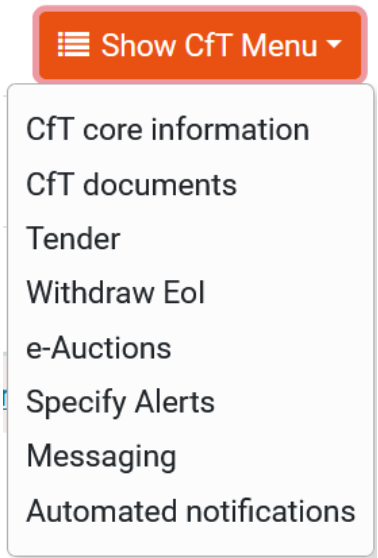


Figure 132: "e-Auctions" option in the "Show CfT Menu"

A list with all e-Auction events scheduled for the particular Call for Tender will be displayed to the user. For each Lot contained in the Call for Tender a separate e-Auction event will be held. The list contains detailed information regarding the event. In particular, the system allows to display information such as the type of event, whether the event is official or practice (i.e. dummy) and the starting date for the event.

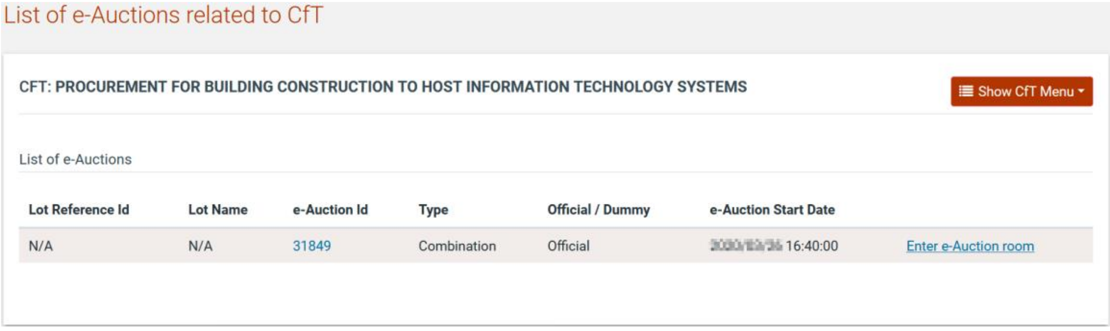


Figure 133: List of e-Auctions related to a Call for Tender

Selecting the "**e-Auction Id**" allows the user to preview all details of the event while selecting the "**Enter e-Auction Room**" link allows the user to enter the e-Auction room which provides all the bidding functionality.

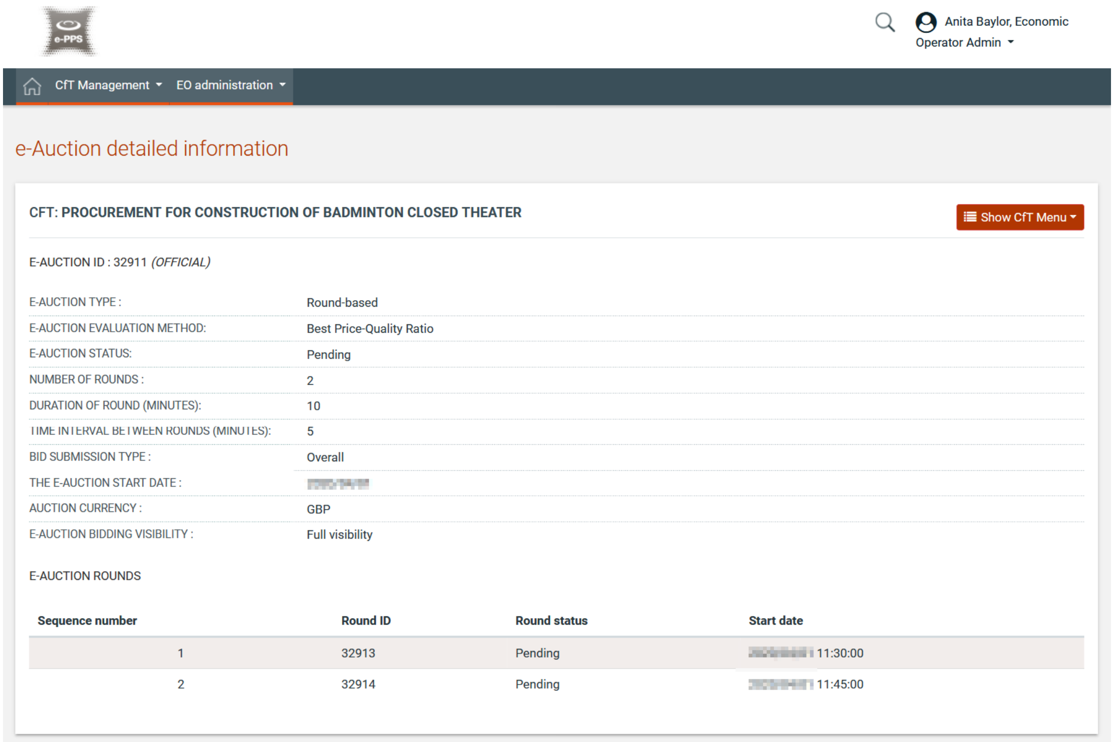


Figure 134: Detailed information regarding the e-Auction event

The detailed view of the e-Auction event provides the following information:

1. The type of the e-Auction:
   a. **Rounds:** The Economic Operators compete based on a number of rounds (each participant can provide a single bid for each round)

   b. **Time:** The Economic Operators compete based on a certain time period (each participant can provide any number of bids within the specified period)
   c. **Combination**: The Economic Operators compete based on rounds with a certain duration (each participants can provide any number of bids within each round)
2. The evaluation method: **Price/Cost Effectiveness** or **Best Price-Quality Ratio**
3. **Status**
4. Number of rounds and duration of each round
5. Duration of the interval between the rounds
6. Use of automated extensions
7. Maximum number of automated extensions
8. Duration of each extension
9. The time period before the end of the event by which, if a bid is received, an extension will be triggered
10. Scheduled date of the e-Auction
11. Currency of the e-Auction
12. Bid visibility option determines what information will be disclosed to the bidders during the auction
    a. **Rank sealed**:
        i. bidder's previous bid,
        ii. a list with all previous bids submitted by the bidder,
        iii. the best bid submitted out of all supplier bids,
        iv. the next possible bid of the bidder.
    b. **Limited visibility:**
        i. bidder's previous bid,
        ii. a list with all previous bids submitted by the bidder,
        iii. the best bid submitted out of all supplier bids,
        iv. the next possible bid of the bidder,
        v. bidder's relative ranking
    c. **Full visibility:**
        i. bidder's previous bid,
        ii. a list with all previous bids submitted by the bidder,
        iii. the best bid submitted out of all supplier bids ,
        iv. the next possible bid of the bidder
        v. bidder's relative ranking
        vi. all bids placed by all suppliers
        vii. latest bids placed by each supplier
    d. **Manual settings:**
        i. bidder's previous bid,

ii. a list with all previous bids submitted by the bidder,
iii. any option from iii to vii appeared in full visibility mode

11.2. Submission of an offer

Access to the e-Auction room will be enabled only at the commencement date and time specified for the event. The user needs to select the button “**ENTER E-AUCTION ROOM**” to access the e-Auction room.

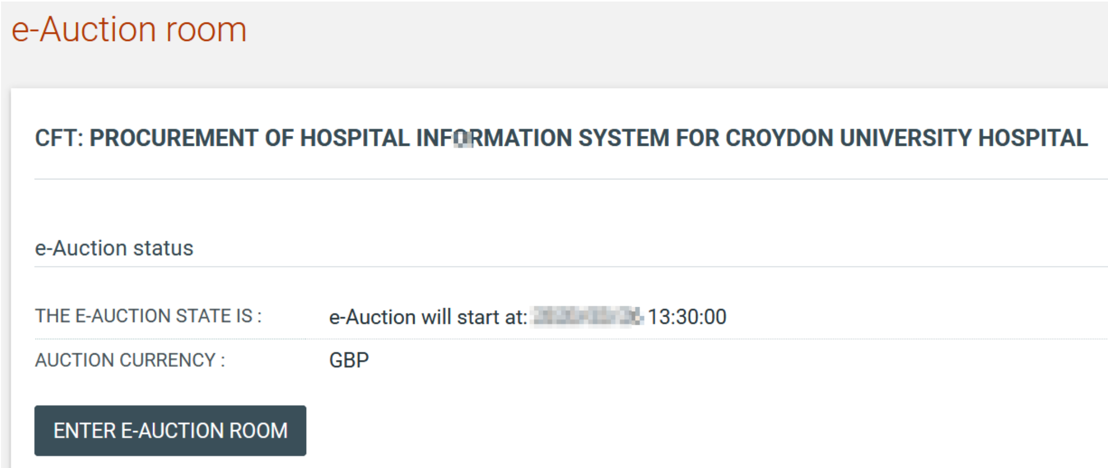


Figure 135: e-Auction status

The e-Auction room provides all functionality for placing a bid for events containing only financial criteria (i.e. the evaluation mechanism is specified as being **Price/Cost Effectiveness**) or combination of financial and criteria specified in the technical envelope (i.e. the evaluation mechanism is specified as being **Best Price-Quality Ratio**).

In both cases the user can visualise the following information at the top of the page:

- The e-Auction state (status, round, etc.)
- The e-Auction currency
- Remaining time until the end of the e-Auction/ round
- Information regarding potential extensions
- E-Auction details available through “View full e-Auction details” link

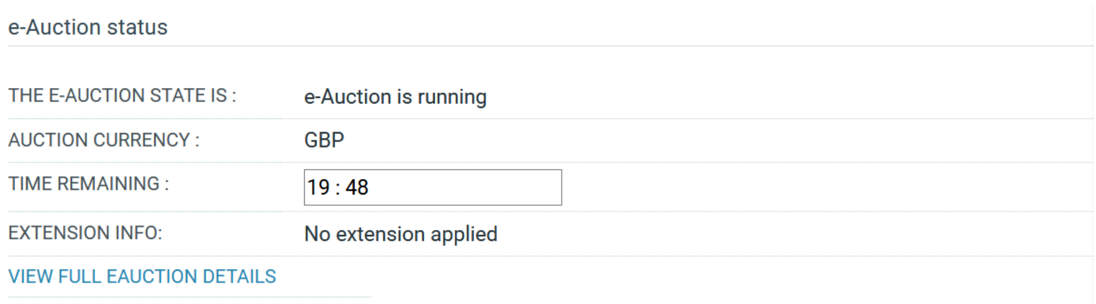


Figure 136: e-Auction room, main information regarding the e-Auction

11.2.1. Placing a bid in a Price/Cost Effectiveness based auction

In this type of events the bidding is performed only on the associated financial criteria. The system lists all the participating financial criteria. The user provides his financial bid in all participating criteria (i.e. “**Cost of Consulting**” and “**Cost of Training**”) and then selects the “**SUBMIT BID**” button to submit the bid in the system.

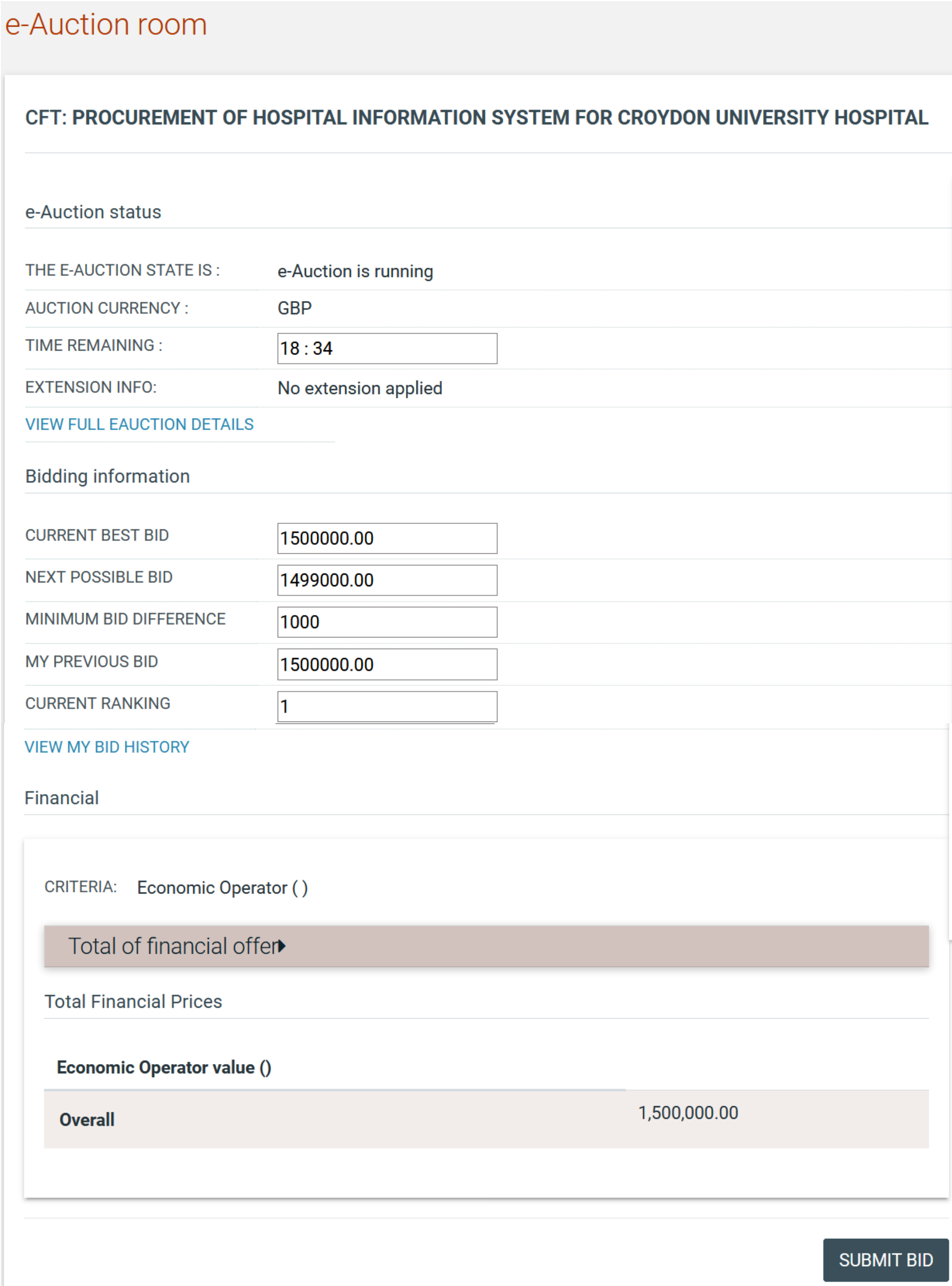


Figure 137: Submit a Price/Cost Effectiveness bid

In addition to the information described above, the following information fields are displayed in Price/Cost Effectiveness e-Auctions:

- **Current best bid:** The lowest bid submitted
- **Next possible bid**: A suggestion of the total value of the next bid in order to rank at the first position

- **Minimum Bid difference.** The minimum allowed bid difference
- **My previous bid**. The value of the last bid depending on the visibility settings the following additional information are displayed
- **Current ranking:** An indication on the user's ranking based on the latest valid bid submitted
- **View my bid history**: a popup enlisting all valid bids submitted by the current user appears
- **View latest bid from all participants**: a popup showing the latest valid bid from all users that participate the current e-Auction
- **View bid history from all participants**: a popup presenting all the valid bid submitted by all participants

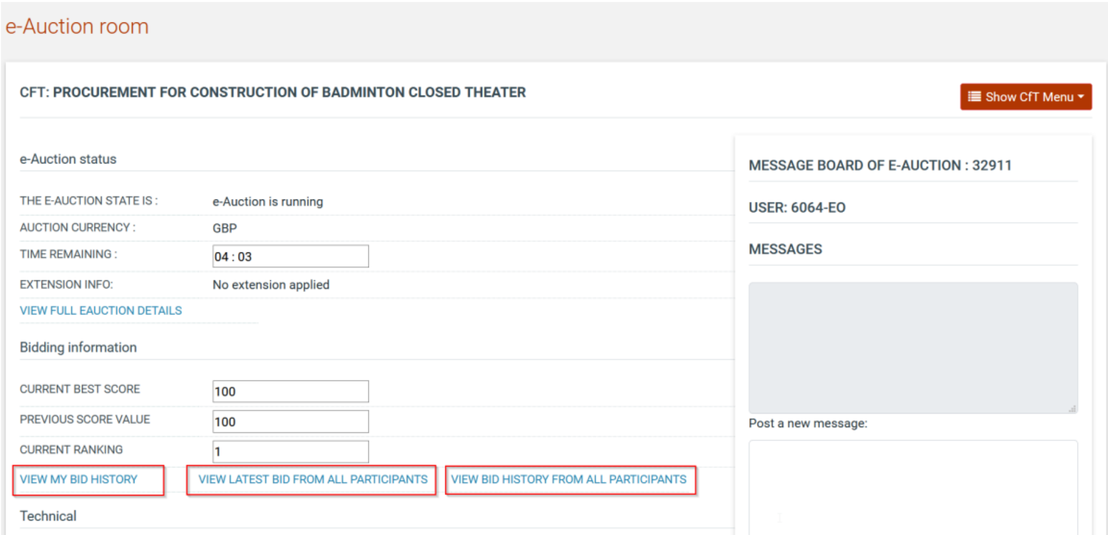


Figure 138: View bid history

The section "**User**" provides ranking information during the bidding process. The displayed information depends on the e-Auction visibility criteria which are specified by the Procurement Officer Tender Coordinator.

The system prompts the user to confirm the submission of his bid. Selecting the "**OK**" button will submit the bid in the platform while, the "**Cancel**" button will cancel the operation.

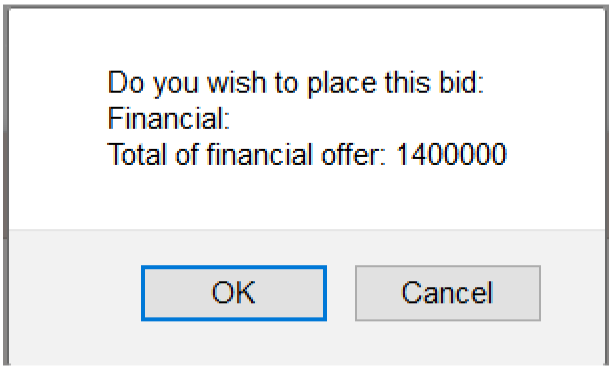


Figure 139: Confirm submission of bid (Price/Cost Effectiveness based auction)

If the bid is valid, an acceptance message will be displayed. The acceptance message contains the unique “**Bid Receipt Id**” and the unique “**Bid Hash**”.

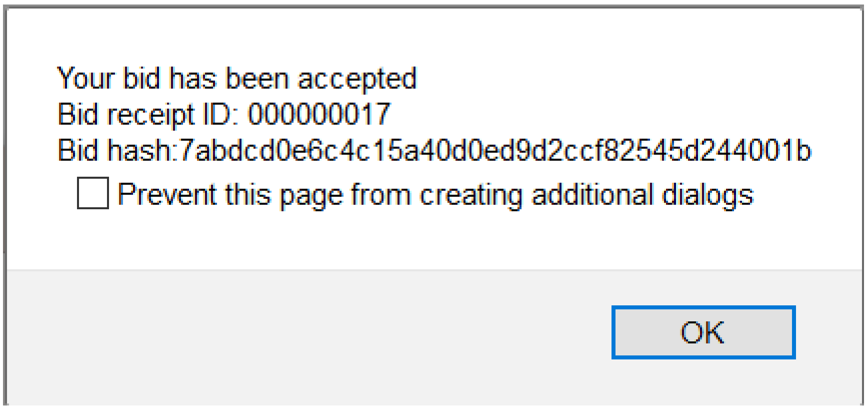


Figure 140: Acceptance message (Price/Cost Effectiveness based auction)

Depending on the bid visibility option, the user can view a list with:

- All the bids submitted by him

Bidder's all previous bid scores
0.88
1.00

Figure 141: Bidder’s all previous bid scores

- The latest bid from all participants

User	Latest valid bid
EO1	0.88
EO2	0.72

Figure 142: Latest valid bid from all participants

- The bids submitted by all participants

User	Latest valid bid
E01	0.88
E02	0.72

Figure 143: Latest valid submitted bid

11.2.2. Placing a bid on a Best Price-Quality Ratio based auction

In this type of events the bidding is performed not only on the associated financial criteria contained within but also on the technical envelope of the tender.

The platform lists all participating criteria; financial and non-financial. The user provides his bid for all financial (i.e. “**Cost of Consulting**” and “**Cost of Training**”) and for all non-financial criteria (“**Number of Departments participating in the project**” and “**Number of consultants working on the project**”). The user selects the “**SUBMIT BID**” button to submit the bid in the system.

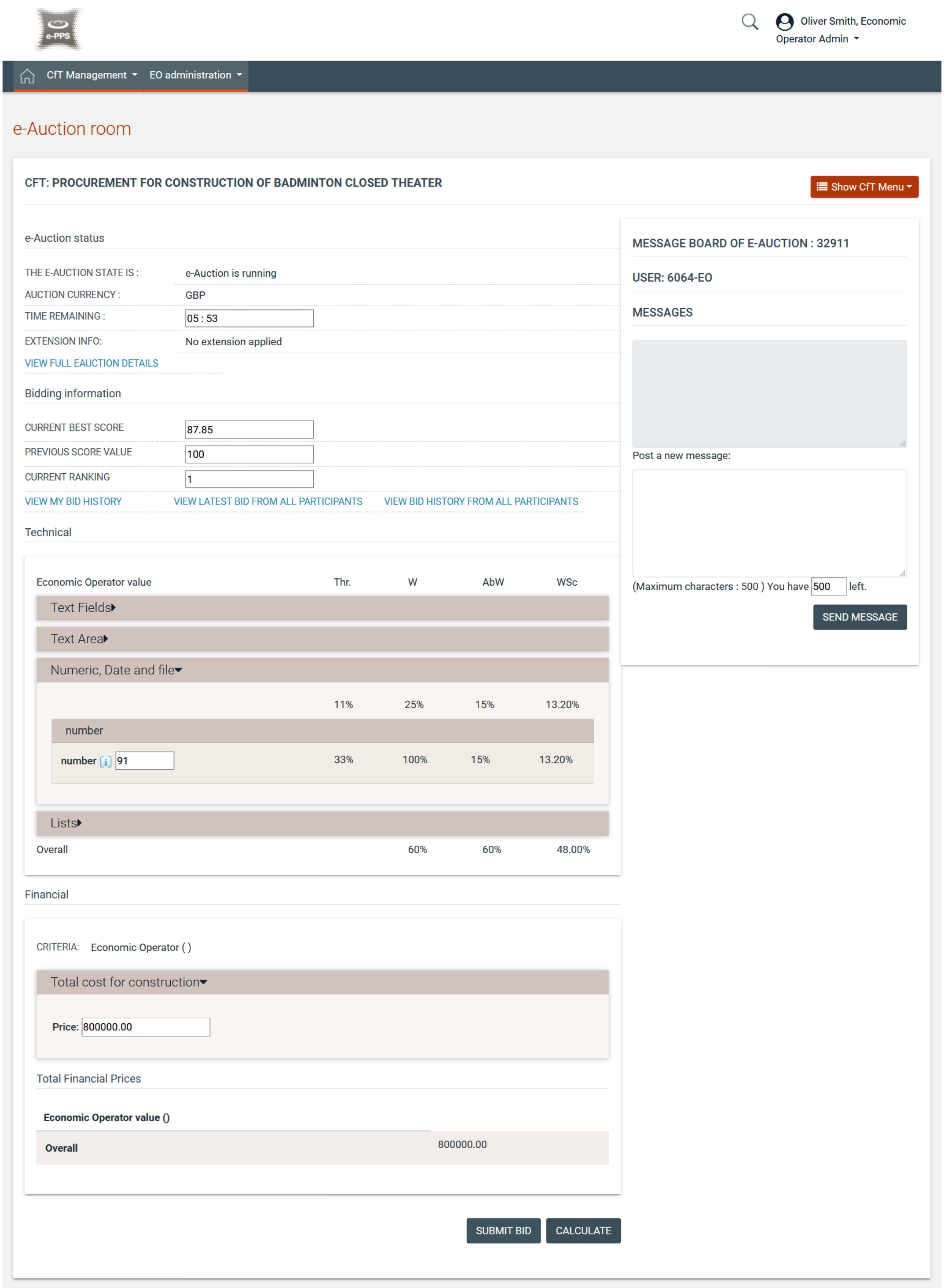


Figure 144: Submit a Best Price-Quality Ratio bid

The system prompts the user to confirm the submission of his bid. Selecting the button “**OK**” will submit the bid in the platform while, the button “**Cancel**” will cancel the operation.

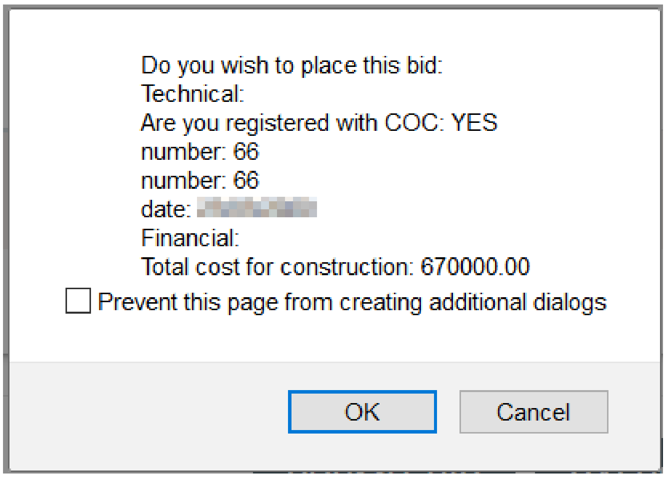


Figure 145: The platform prompts the user to confirm his bid

If the bid is valid, an acceptance message will be displayed. The acceptance message contains the unique "**Bid Receipt Id**" and the unique "**Bid Hash**".

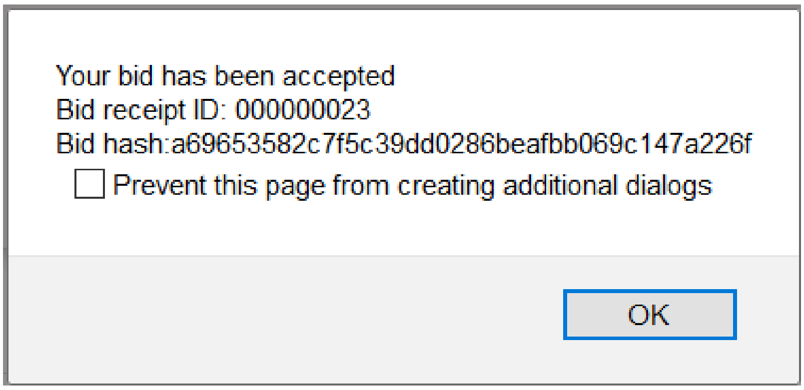


Figure 146: Bid has been accepted

If the bid is not valid, an error message will be displayed to the user. The error message will describe why the bid has not been registered in the system.

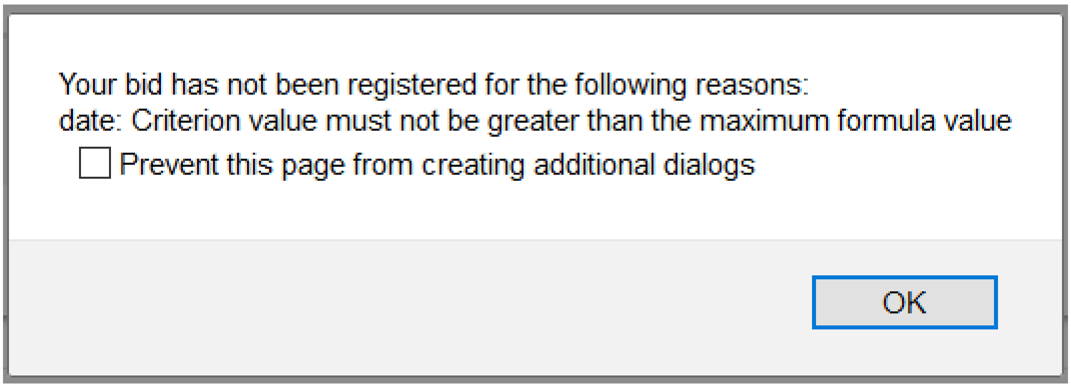


Figure 147: Bid has been rejected

For the technical criteria participating in the e-Auction process, the user can preview the criterion details by selecting the " "icon (displayed next to the criterion description). The system prompts the user to confirm the submission of his bid. Selecting the button “**OK**” will submit the bid in the platform while, the button “**Cancel**” will cancel the operation.

Do you wish to place this bid:
Technical:
Are you registered with COC: YES
number: 88
number: 88
date: [illegible]
Financial:
Total cost for construction: 600000.00

OK Cancel

Figure 148: Details of a technical criterion

Depending on the bid visibility option, the user can view a list with:

- All the bids submitted by him
- The latest bid from all participants
- The bids submitted by all participants

Bidder's all previous bid scores
0.84
1.00

Figure 149: Bidder’s all previous bid scores

User	Latest valid bid
E01	1.00
E02	0.36

Figure 150: Bidders latest bid score

User	Valid Bid
E01	0.87
E01	1.00
E01	1.00
E01	1.00
E01	1.00
E02	0.43
E02	0.36

Figure 151: Bidders all previous bid scores

11.2.3. Extensions

Automated extensions are enabled by the Procurement Officer Tender Coordinator during the creation of an e-Auction event. Information regarding the use of automated extensions is available for the user when previewing the detailed information of the e-Auction event. The following information fields are available to the user:

- Maximum number of automated extensions
- Duration of each extension round
- Time before the end of e-Auction when extension is possible

ENABLE AUTOMATED EXTENSIONS :	Yes
MAXIMUM NUMBER OF AUTOMATED EXTENSIONS :	2
DURATION OF EXTENSION (MINUTES):	2
TIME BEFORE THE END OF E-AUCTION WHEN EXTENSION IS POSSIBLE (MINUTES):	1

Figure 152: Detailed information regarding automated extensions

During the bidding process, the user previews if an extension has been applied. When an extension is applied, the platform displays the extension number and the end time and date of the extension.

11.3. Message Board

The e-Auction module provides a message board functionality for the prompt communication between Economic Operators and the administrator of the e-Auction.

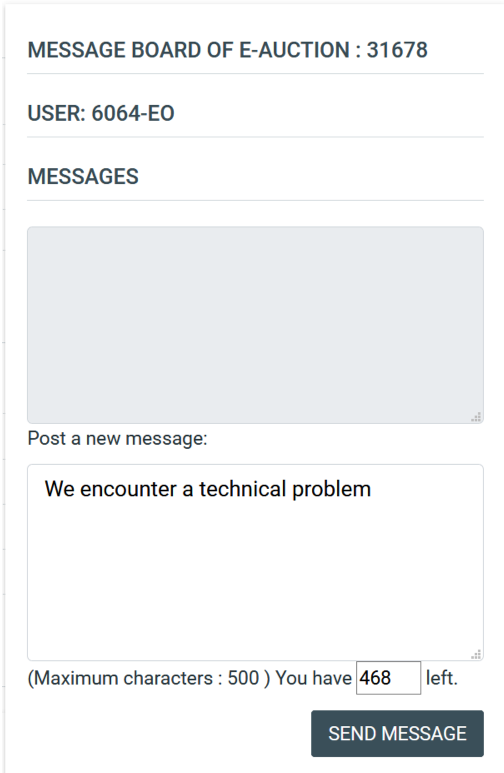


Figure 153: e-Auction message board

The upper part of the message board displays all messages posted by participating Economic Operators and also the messages/replies posted by the e-Auction Administrator.

In order to post a message the user fills the “**Post a new message**” section and then, clicks on the “**SEND MESSAGE**” button to post the message on the board.

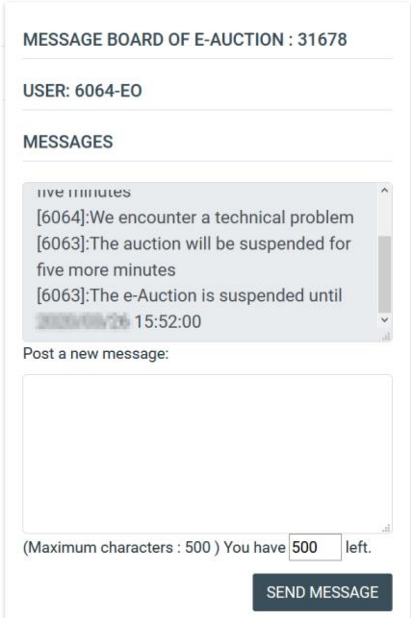


Figure 154: Posting a message on the message board

11.4. Preview of a completed e-Auction

At the end of all the e-Auction rounds, the platform will present the details regarding the bidding activities of the Economic Operator (for example “**Best Overall Bid Per Round**”). The platform will display the auction detailed information.

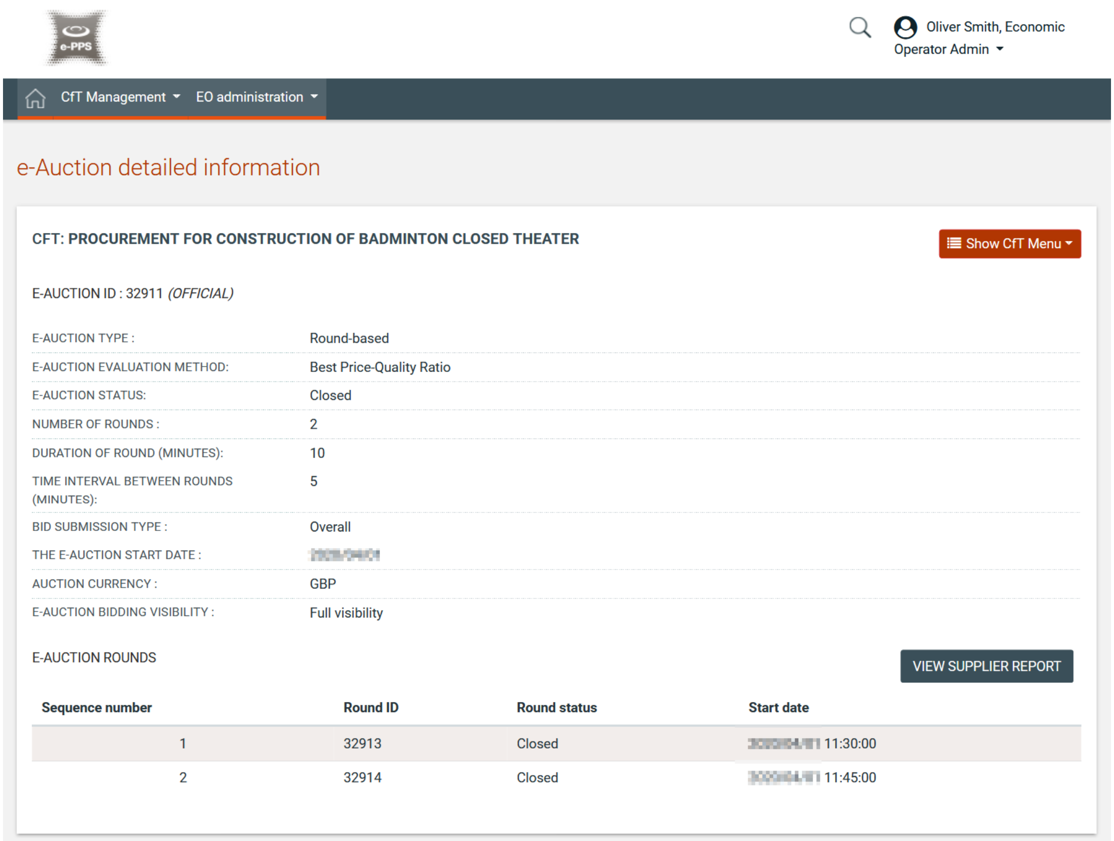
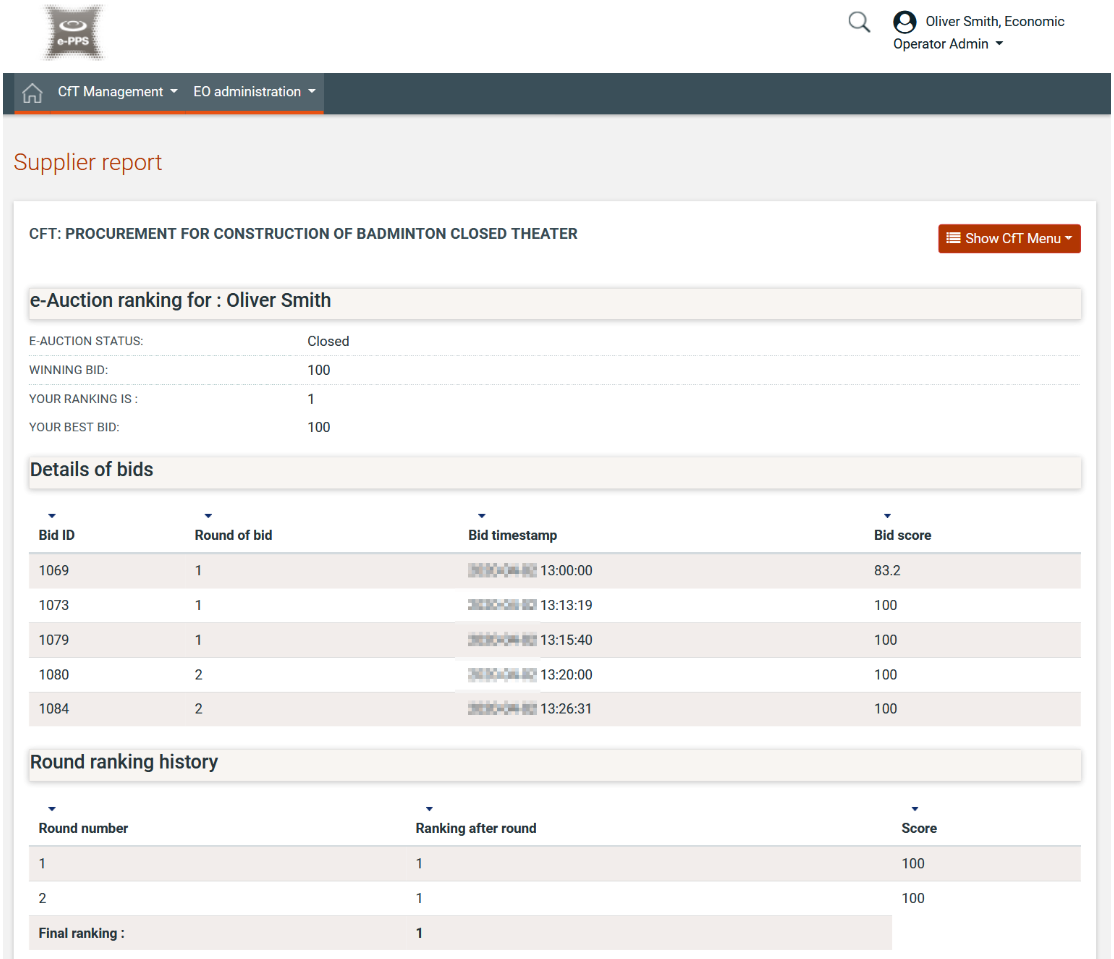


Figure 155: e-Auction detailed information

In order to view the bidding results the user needs to select the "**VIEW SUPPLIER REPORT**" button.

The platform will provide the following information to participating Economic Operator:

- Winning bid of the e-Auction
- Ranking of the Economic Operator
- Best bid of the operator
- Detailed information for all received bids from the Economic Operator
- Ranking information per round
- Several e-Auction charts
- Bid details



Oliver Smith, Economic Operator Admin

CfT Management EO administration

Supplier report

CFT: PROCUREMENT FOR CONSTRUCTION OF BADMINTON CLOSED THEATER

Show CfT Menu

e-Auction ranking for : Oliver Smith

E-AUCTION STATUS:	Closed
WINNING BID:	100
YOUR RANKING IS :	1
YOUR BEST BID:	100

Details of bids

Bid ID	Round of bid	Bid timestamp	Bid score
1069	1	[illegible] 13:00:00	83.2
1073	1	[illegible] 13:13:19	100
1079	1	[illegible] 13:15:40	100
1080	2	[illegible] 13:20:00	100
1084	2	[illegible] 13:26:31	100

Round ranking history

Round number	Ranking after round	Score
1	1	100
2	1	100
Final ranking :	**1**	

Figure 156: Bid information

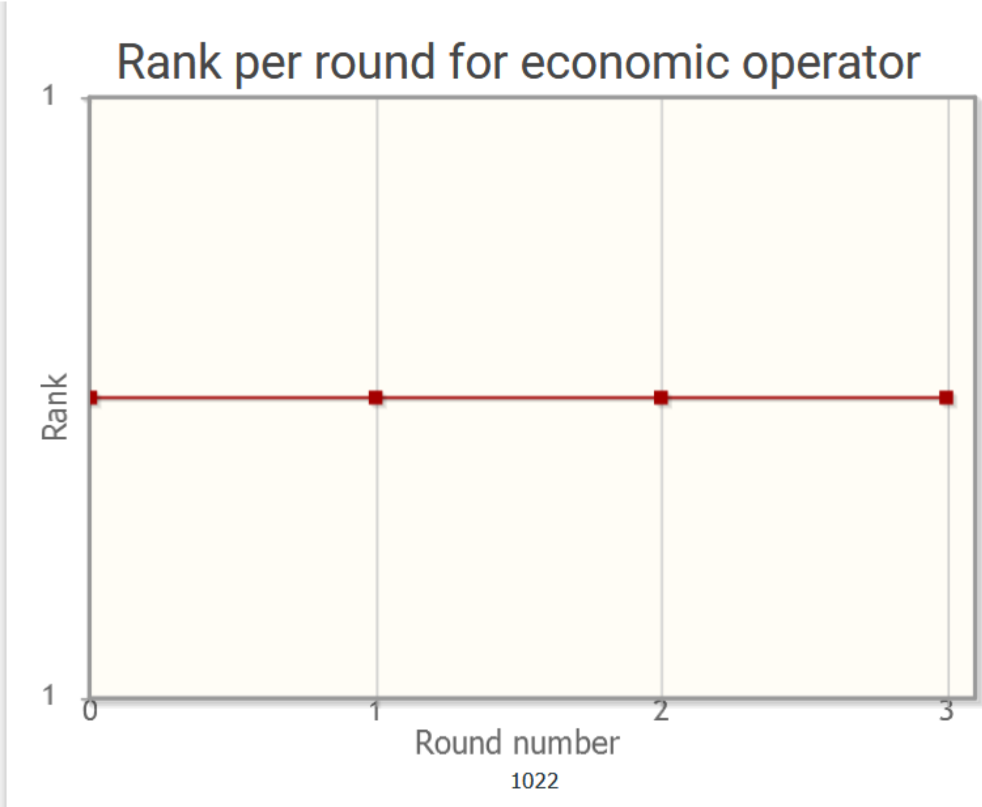


Figure 157: Rank per Round for EO

12. Contract Awarding

If the Economic Operator is awarded a contract the “**Reply to contract award**” task will appear in the user’s task list.

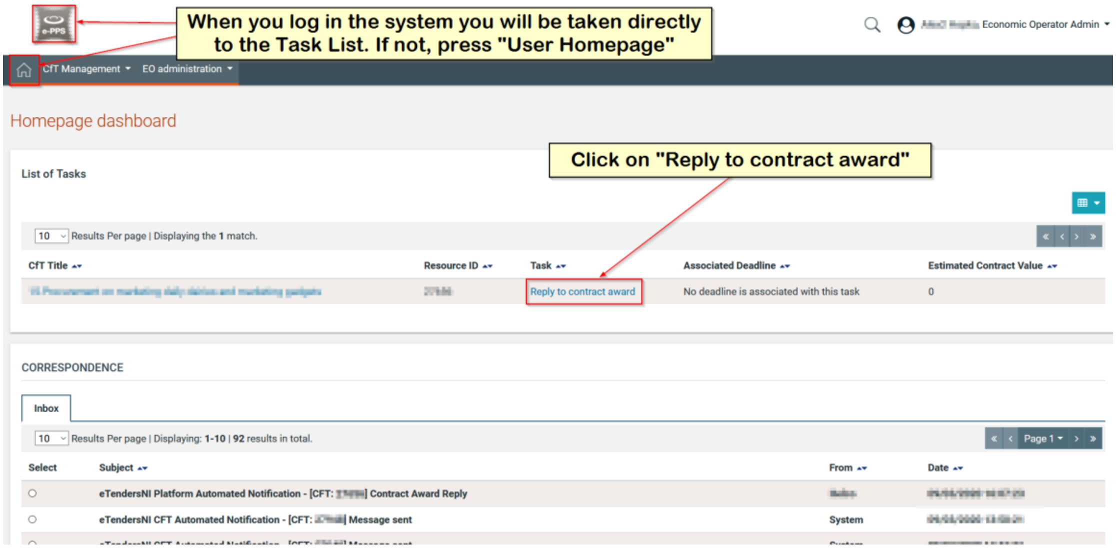


Figure 158: Reply to contract award task

The user has the option to accept or decline the award. In case the award is declined, a mandatory reason must be provided in the available text area.

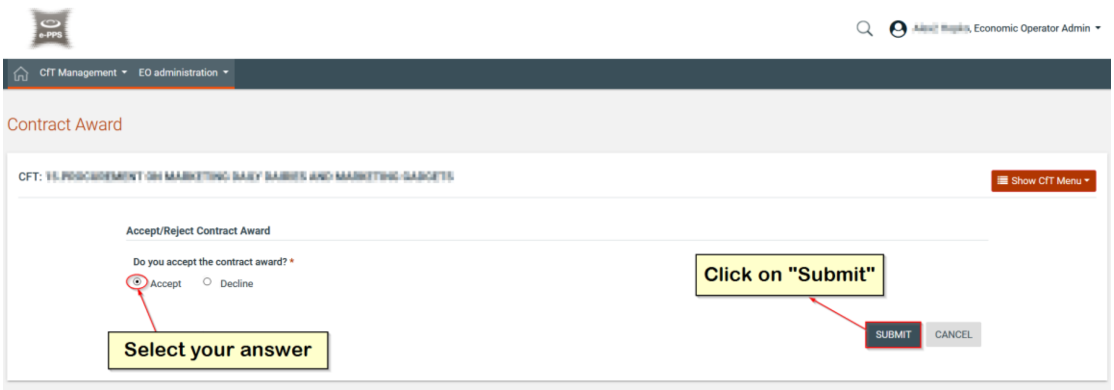


Figure 159: Accept contract award

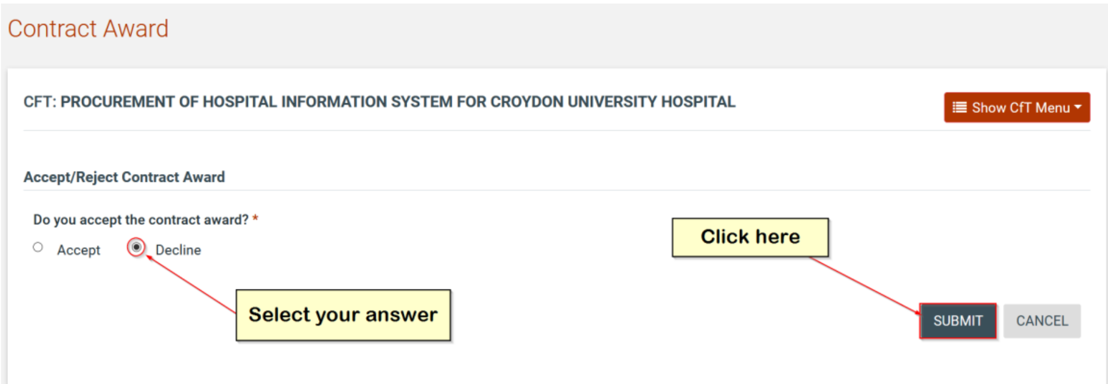


Figure 160: Decline contract award

13. Additional Functionality

13.1. Inserting Common Procurement Vocabulary Codes (CPV)

In order to insert a Common Procurement Vocabulary (CPV) code, the platform provides a code selector functionality accessible when the user selects the search icon next to the "CPV Codes of interest" field:

Figure 161: CPV codes field

In the CPV code selection window, the following functionality is provided:

1. Select a CPV code from the main CPV window:
   - A detailed presentation of all codes in the tree hierarchy is enabled by using the ⊞ and ⊟ signs.

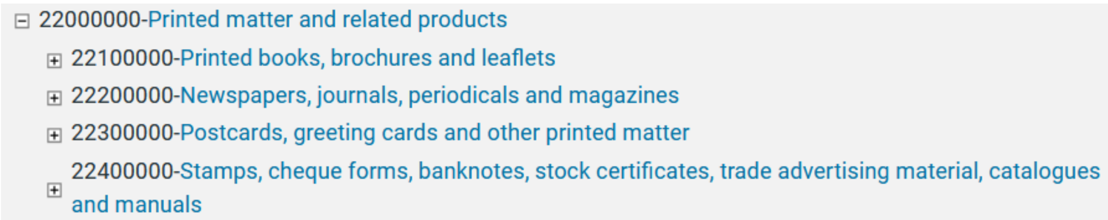


Figure 162: Hierarchical structure of CPV codes

   - Double clicking on a CPV code adds it to the list of the selected items:
     - All selected codes are included in the selected items window
     - Functionality is provided to define the presentation order of several CPV codes by using buttons and . In addition the user can delete a selected CPV code by using the button

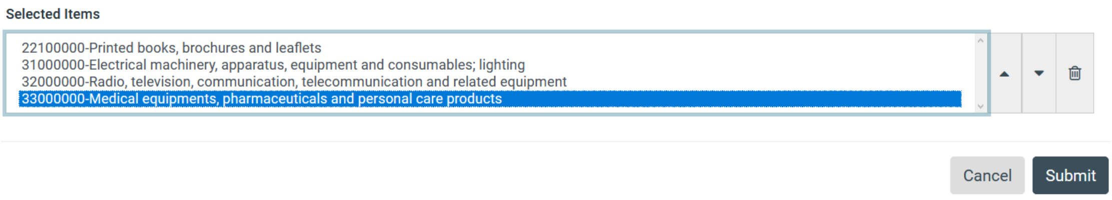


Figure 163: Selected CPV codes

2. The user can use the search functionality of a CPV code:
    - The user provides the title or the number of the code (entire or partial description) in the search field
    - The user selects the "**Search"** button
    - The results are displayed in the search results panel. Selecting a CPV code and clicking on the "**Add to the List**" button will include the CPV code in the selected items

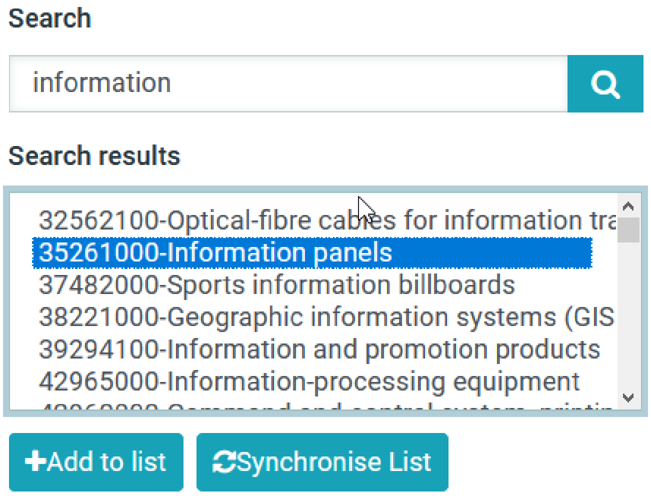


Figure 164: CPV search functionality

Finally, the user clicks on the "**SUBMIT**" button to submit the selected codes to the application. All selected codes are, then, presented in the corresponding field.

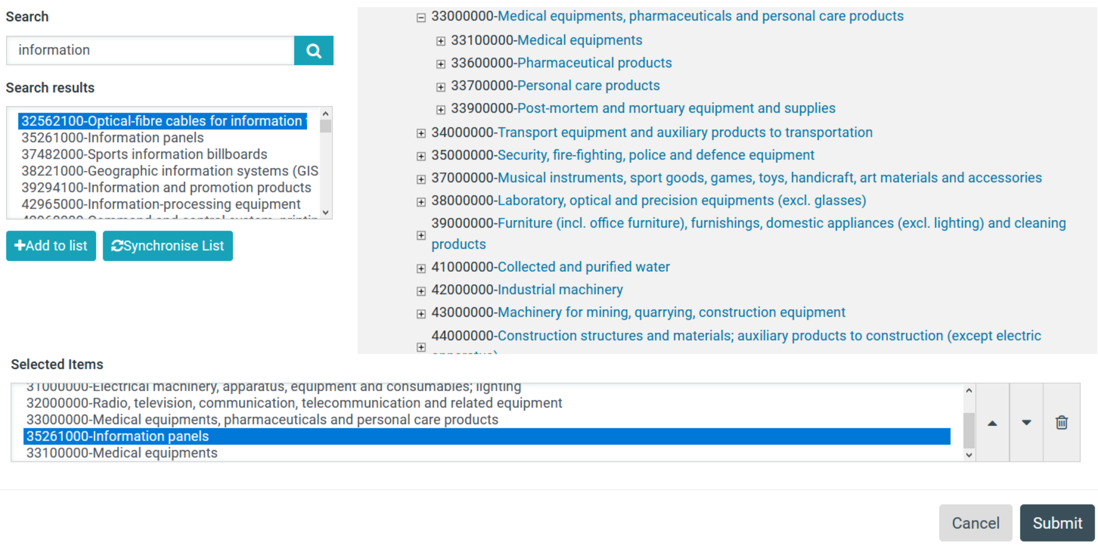


Figure 165: Selection of CPV codes

Figure 166: Submitted CPV codes

14. Helpdesk contact details

SUPPLIER helpdesk contact details	
Email address	ni-eproc-helpdesk@eurodyn.com
Telephones	0800 240 4545 or +44 20 341 14 271

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