e-Tendering Services

EPPS0909 - SIMPLE TENDER PREPARATION

European Dynamics

SIMPLE TENDER PREPARATION

EPPS0909

Purpose

This guide provides detailed information on the preparation and submission of tenders through the online e-Tendering system. Please read this guide carefully before preparing a tender response.

IMPORTANT NOTE: You will need the following software in order to be in position to submit a tender:

- Use one of the following web browsers: Microsoft Edge (latest version), Mozilla Firefox (latest version), Google Chrome (latest version), Safari (latest version).

- Have a valid e-mail address

- JavaScript enabled, Session Cookies enabled, Internet access through HTTP/HTTPS,

For any queries you may have regarding the content of a particular procurement (e.g. tender questions/criteria, material for the responses, etc.), you may contact the relevant Contracting Authority using the messaging functionality. For any technical issues, you may also contact the eTendersNI Helpdesk via email or telephone.

In order to follow the steps described in this guide, you should first log in to the system with your supplier account and locate the tender opportunity to bid for.

Procedure

The following diagram depicts the steps that a supplier should follow, in order to prepare and submit his tender:
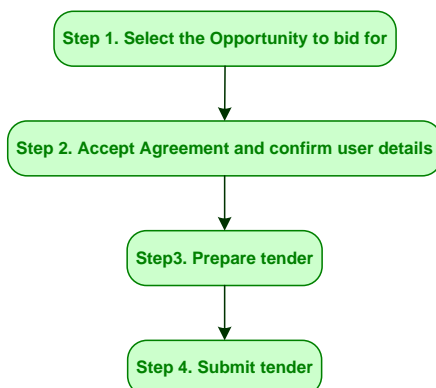
Detailed Procedure

This section describes in detail the steps a User should follow in order to prepare and submit their tender. The first step of the Tender Submission process is to:

- Select the call for tender to bid for

Use the Search form available on top of the page or the advanced search functionality in order to find the Opportunity to bid for.

- Click on the "Tender" option in "Show CfT Menu".

- Accept Agreement and confirm user details

Select the supplier users to be associated with the Opportunity, accept the agreement and confirm the validity of the user details.

View Tenders

CFT: MAINTENANCE OF COMPRESSORS   Show CfT Menu

1. Type of association
○ 1. Associate all users of my Economic Operator with this CfT
◉ 2. Associate only myself with this CfT

2. Confirm the validity of your user details

Name	Last Name	Username

ACCEPT & CONFIRM ALL OF THE ABOVE   CANCEL

▪ Prepare a tender response through clicking on the "Create your tender online" option

View Tenders

ℹ Tender submission is now open.   Please click on "Create your tender online" button in order to start preparing you tender response. After completing all sections, submit your tender. Your tender should then be listed in the list of submitted tenders below. ✕

CFT: MAINTENANCE OF COMPRESSORS   Show CfT Menu

⚠ Please select either "Create your tender online" or "Create your tender locally".   ✕

"Create your tender online" allows to work online, temporarily saving tender data on eTendersNI. Data is saved permanently only upon clicking "Submit", to trigger the official tender submission.

"Create your tender locally" requires installation of Java and an internet connection. Tender data is saved locally by the tender preparation tool (on user PC) and is saved permanently only upon clicking "Pack and Submit tender", to trigger the official tender submission.

Create your tender online ▶   Click on the "Create your tender online" button

Create your tender locally ▶

▪ 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 your My Responses.

Maintenance of Compressors [2415387]

Create Response

Create Response *

| Please enter a response title |

Provide a meaningful title that describes your response. The title will not be visible to the Buyer, it will help you navigate efficiently and distinguish between multiple tender submissions.

Please provide a title for your tender response

Click on the "Save" button in order to proceed.

Save

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

Maintenance of Compressors [2415387]

[964] my response

Delete

Edit

Click on the "Edit" button in order to be able to fill in your tender response

| COMPLETION | TIME LEFT |
| 0% | 1 Months 2 Hours |

0%	ELIGIBILITY
0%	TECHNICAL
0%	FINANCIAL
	DOCUMENT LIBRARY

Modify Tender Title
Completion Summary
Workspace Details
History
Related Responses

1. Section 1. Tender Documents	⚠
2. Section 2. Public Sector Standard Conditions of Contract for Services Contracts.	⚠
3. Section 3. Commercial Conditions of Contract for Services Contracts	⚠
4. Section 4. Form of Tender	⚠
5. Section 5. Data Privacy	⚠
6. Section 6. Organisation Identity	⚠

- 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 Annex A.

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.

Saving Tender as Draft

You can save a tender response which has not been completed, and continue the tender preparation another time.
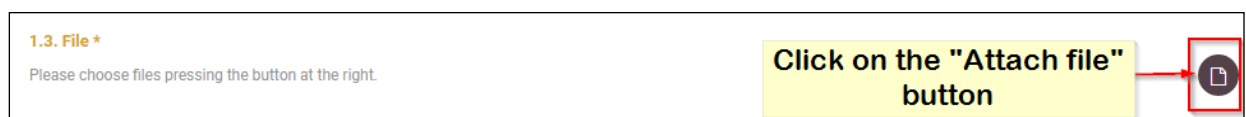
- ▪ Your provided values are saved automatically every time you perform an action on the application.
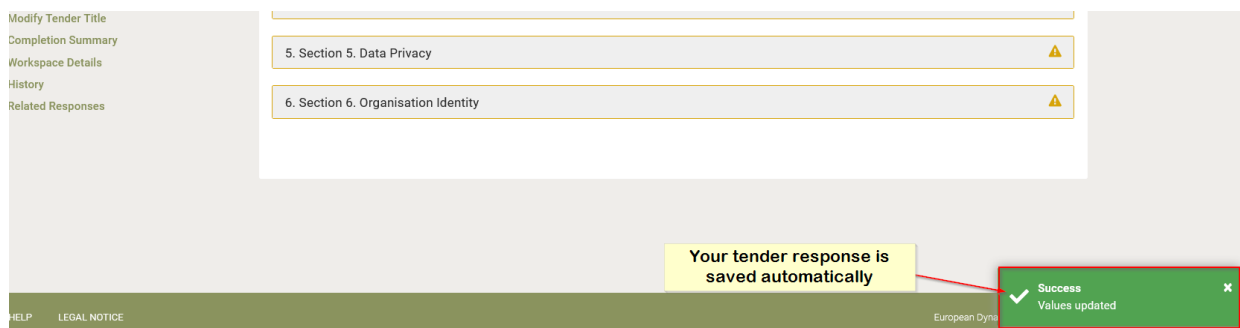
- • A record is also added to the "*List of draft Tenders (created online)*". Please note that you need to refresh the "Tender" page and expand this list in order to view the record.

- • Please note that you need to select the draft tender response you wish to edit and the click on the "Edit" button.
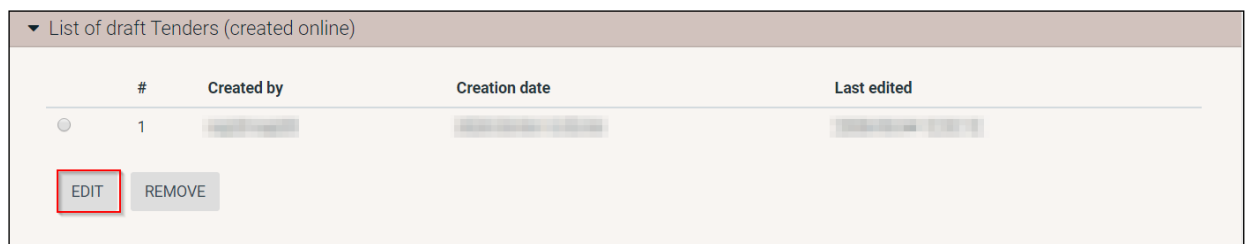
- • When you are asked to attach a file in response to a question/criterion, click on the "Attach file" button in order to navigate to the "Document library" area.

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

Select Reference Files For ✕

File

☐	Filename	Title	Comment

Upload a new file

Click on the "Upload a new file" link in order to find the file you want to attach.

Cancel   Save

- 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).

Upload Files ✕

Upload Files ⓘ

File size Limit: **100 MB** | Total space per response **100 MB**

Click on the "Choose Files" button and select the file you wish to submit or drag & drop a file.

Choose Files   Choose Files or drag & drop here

Upload queue ⓘ

Queue length: 0

Name	Size	Progress	Status	Actions

Queue progress:

Upload   Cancel   Remove

Back

- Select the necessary file(s).

- Click on the "Upload" button in order to upload your file(s) to eTendersNI.

- Select the referenced file for the particular question/criterion.

Select Reference Files For ✕

File | Select the referenced file for this criterion.

☐	**Filename**	**Title**	**Comment**
☑	Document1.doc	N/A	Enter comment/s

Click on the "Save" button

Upload a new file | Cancel | Save

IMPORTANT NOTE:

- Please note that you should make sure that at least one document is associated with at least one question/criterion. Files that are not associated with any question/criterion are **not** included in a tender submission.

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

- When you select "Submit" your tender response is encrypted and submitted to the buyer area.

- The buyer **cannot** access the response until **after** the Tender Opening time.

Maintenance of Compressors [2415387]

[1700] my response

(EDITED)

Click on the "Submit" button in order to submit your tender response

Submit

COMPLETION	TIME LEFT
100%	1 Months 22 Days

100% ELIGIBILITY

100% TECHNICAL

100% FINANCIAL

DOCUMENT LIBRARY

Modify Tender Title
Completion Summary
Workspace Details
History
Related Responses

1. Section 1. Tender Documents ✔

1.1. List *
○ a   Select one option
○ nb

Once the tender has been submitted it will appear in the List of submitted tenders in eTendersNI. 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. It is advised that you contact the eTendersNI Helpdesk for assistance, as there could be an error in your tender submission and the tender may be invalid.

When you submit your tender an e-mail notification is dispatched to your email address. Please note that the email notification **simply acknowledges that a tender has been submitted** on the eTendersNI system. It is not a confirmation that the tender submission is complete or correct. Even if the submitted tender is non conformant, the automatic notification will be dispatched to your address if the tender submission has been transmitted successfully.

Following the Submission, the tender appears in the List of Submitted Tenders, with a Tender Receipt ID. Click on the .pdf icon in the "View Tender" column to access the pdf.

Please use the .pdf file of your submitted tender response to check that it is complete and the correct files have been attached to the CfT questions/criteria. The .pdf file provides an opportunity for you to check that you have included responses to each question/criterion and attached the correct files where required.

IMPORTANT NOTE:

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.

ANNEX – A (further information on online Tender Submission)

Particular system configuration settings can block or prevent the proper creation of your tender response.

Local configuration on the PC (operating system, user account, browser, etc.) and/or the network (firewall, etc.) may block certain functionality of eTendersNI. If a new window does not open when you select "Prepare My Response Online" or you have any other issue, please contact your organisation's IT department in order to resolve it.

1.1. Complete the Eligibility Envelope and the Technical Envelope

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

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

questions/criteria have been answered.

IMPORTANT NOTE:

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

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

- Please note that mandatory questions/criteria are indicated with an asterisk (✳).

- If an eTendersNI online profile certificate is being requested in the Tender response you should check the box to confirm that the certificate has been completed and you are authorising the system to use the answers.

IMPORTANT NOTE:

When using the above, please note that you should make sure that the required certificate has been completed in your organisation details. Please access is through "EO management" > "e-Attestations" > "Valid" page.

1.1.1. 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 questions/criteria may require selecting a "Yes" / "No" answer, others may require selecting a date using calendar functionality or simply providing a text input.

- Text question/criterion

1.1. Person to be contacted regarding this tender *

| Enter Text | Max 50 characters. |

- Number question/criterion

1.2. We consider that the information in this tender is commercially sensitive *

| Enter Number | Only numbers in the range [10,1000] are allowed |

- Text area question/criterion

1.1. Provide details of the name, address and contact details of your Bank who will provide a reference, if required *

Max 10000 characters.

- List option question/criterion

1.2. Has your organisation met the terms of its banking facilities and loan agreements (if any) during the past year? *

○ Yes

○ No

Select one option

- Multiple selection list (checkboxes) question/criterion

1.3. If asked would you be able to provide at least one of the following? *

☑ A copy of your most recent audited accounts (for the last two years if this applies))

☐ A statement of your turnover

☑ Profit and loss account and cash flow fot the most recent year of trading

Select one or more options

- Date question/criterion

1.4. Start date *

22/02/2020

<	Feb ⇕	2020 ⇕	>
Mo	Tu	We	Th	Fr	Sa	Su
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	1
2	3	4	5	6	7	8

The date must be in the range [10/02/2020, 23/04/2020]

Click on the "Calendar" icon in order to select a date

- File question/criterion

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

1.3. File *

Please choose files pressing the button at the right.

Click on the "Attach file" button

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

Select Reference Files For   ×

File

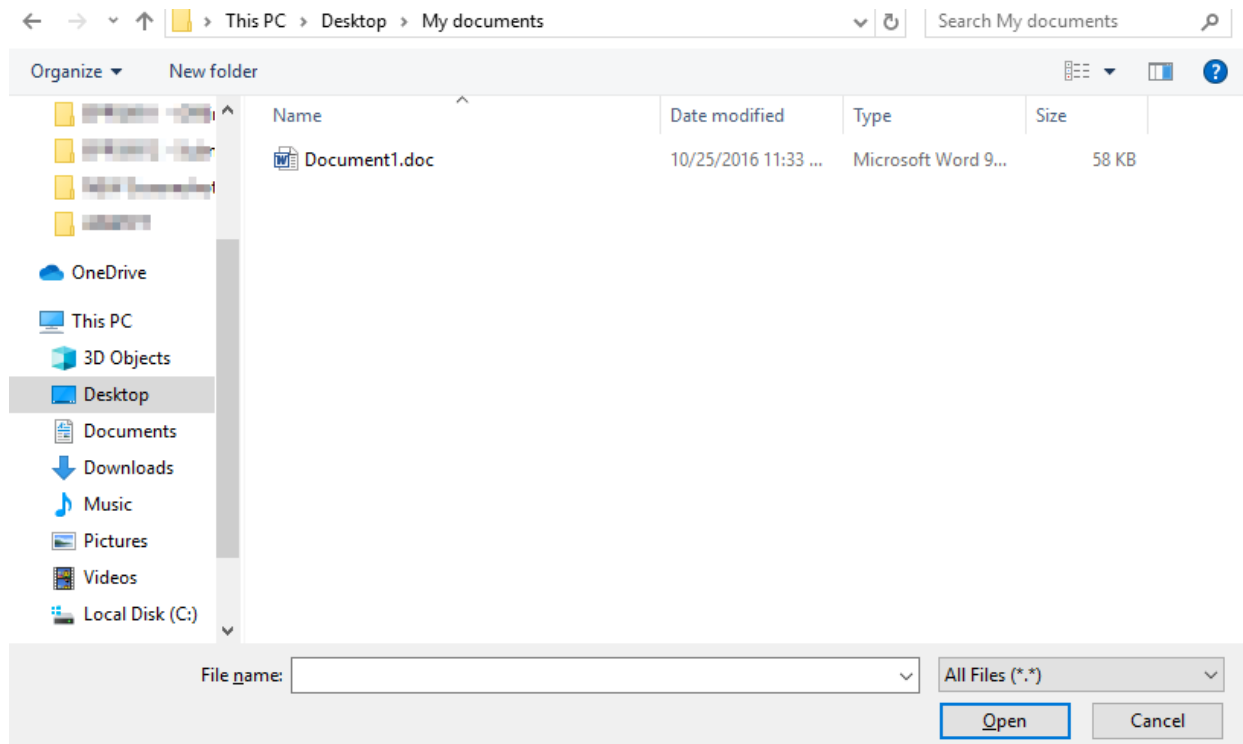|	Filename	Title	Comment

Upload a new file

Click on the "Upload a new file" link in order to find the file you want to attach.

Cancel   Save

- 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).

Upload Files   ✕

Upload Files ⓘ

File size Limit: **100 MB** | Total space per response **100 MB**

> Click on the "Choose Files" button and select the file you wish to submit or drag & drop a file.

| Choose Files | Choose Files or drag & drop here |

Upload queue ⓘ

Queue length: 0

Name	Size	Progress	Status	Actions

Queue progress:

| Upload | Cancel | Remove |

Back

- Select the necessary file(s).

- Click on the "Upload" button in order to upload your file(s) to eTendersNI.

Upload Files

Upload Files i

File size Limit: **100 MB** | Total space per response **100 MB**

Choose Files	Choose Files or drag & drop here

Upload queue i

Queue length: 1

Check both the "Progress" and "Status" labels

Click on the "Upload" button to upload your document.

Name	Size	Progress	Status	Actions
Document1.doc	58 KB	100%	✓	⬆ ✕

Queue progress:

Upload	Cancel	Remove

Back

- Select the referenced file for the particular question/criterion.

Select Reference Files For

File

Select the referenced file for this criterion.

	Filename	Title	Comment
☑	Document1.doc	N/A	Enter comment/s

Click on the "Save" button

Upload a new file

Cancel	Save

IMPORTANT NOTE:

- Please note that you should make sure that at least one document is associated with at least one question/criterion. Files that are not associated with any question/criterion are <u>not</u> included in a tender submission.

- Optional file attachment

Click on the "Attach Optional Document" icon if you would like to upload a document or file related to your response in a question/criterion.

1.6. Minimum Standard 1
Please choose files pressing the button at the right.

Attach relevant document (optional)

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

1.2. Complete the Financial Envelope

After you have completed the Eligibility and Technical envelopes, fill in the financial envelope. The values expected in the financial envelope are currency values, hence only numeric values are allowed in this envelope.

1.3. Validate tender (optional)

- The below progress indicators display the progress of the tender preparation for each envelop (level of completion of each envelope's using pie chart) as well as the total progress of the tender response (total progress pie shown in the top).
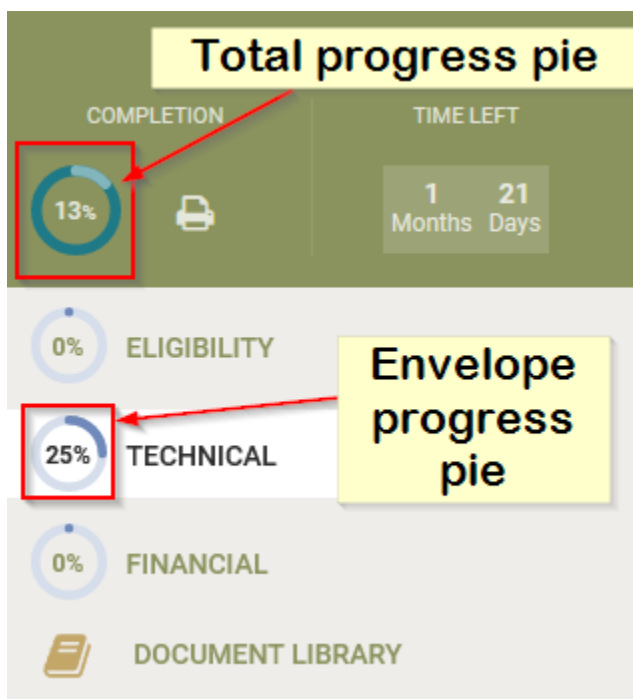
- In addition, you may validate your tender by clicking on the "Completion Summary" option from the left-hand menu.

Tender Preparation Alternative Flow

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

- Your provided values are saved automatically every time you perform an action on the eTendersNI.

All saved draft versions are saved in your secure space 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 are only accessible to the Procurement Officer, **after the tender opening ceremony**.

1. Edit draft tender

In order to edit a draft tender previously saved as described above, you may select it from the "List of draft Tenders" and click on "Edit".

▼ List of draft Tenders (created online)

	#	Created by	Creation date	Last edited
○	1			

EDIT   REMOVE

-END OF DOCUMENT-