

OECS eTendering

D13 End-user Supplier Manual

Issue 01

Version 2.0

EUROPEAN DYNAMICS S.A.



Modification History

Date	Version	Author	Comments
18/04/2013	1.0	ED	Initial version
05/06/2013	2.0	ED	Updated with latest modifications

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Acronyms / Abbreviations

Acronym/ Abbreviations	Meaning
CA	Contracting Authority
CAPC	Contracting Authority Procurement Coordinator
CAPCA	Contracting Authority Procurement Coordinator Assistant
CMS	Chief Medical Store
EC\$	Eastern Caribbean Dollar
ED	European Dynamics SA
EGRIP	Electronic Government and Regional Integration Project
e-PPS	European Dynamics electronic Public Procurement System
e-PPSS	electronic Procurement System for OECS Pharmaceutical Procurement Services
GRN	Goods Receipt Notice
MB	Megabyte
MoH	Ministry of Health
MS	Member State (of the OECS)
OECS	Organisation of Eastern Caribbean Countries
PO	Purchase Order
PO/ES	Procurement Officer / Evaluation Staff (member of the evaluation committee)
PO/ESR	Procurement Officer / Evaluation Staff Responsible (leader of the evaluation committee)
PO/OS	Procurement Officer / Opening Staff (member of the tender opening committee)
PO/TC	Procurement Officer / Tender Coordinator (member of the coordination committee)
PPS	OECS Pharmaceutical Procurement Service
PQQ	Pre-Qualification Questionnaire
QDS	Quotation Data Sheet
SA	System Administrator
US\$	United States Dollar
XLS	Microsoft 2003 Excel Spreadsheet

1 Minimum and Recommended system requirements

Minimum requirements:

- Relatively recent Operating System (e.g. Windows XP or 7, or equivalent)
- Office tools (e.g. MS Office support MS Word, MS Excel, or equivalent)
- Email client (e.g. MS Outlook, or equivalent) with access to the end-user's mailbox
- Browser: Internet Explorer (6 or higher), or Firefox (3.5 or higher), or Opera / Chrome / Safari (latest)
- Session Cookies: enabled
- Window Resolution: 1024 x 768
- PDF viewer (e.g. Adobe PDF Reader, or equivalent)
- Compression/decompression software (e.g. 7zip, winrar, or equivalent)
- JavaScript enabled, for full end-user experience
- Access to the Internet through HTTP/HTTPS
- A valid e-mail address
- Pop-up blockers disabled
- Java Runtime Environment (JRE) 1.6 or higher



Recommended requirements:

- Windows 7, or above
- MS Office 2003, or above
- Email client (e.g. MS Outlook, or equivalent) with access to the end-user's mailbox
- Browser: Internet Explorer (8 or higher), or Firefox (5 or higher), or Opera / Chrome / Safari (latest)
- Session Cookies: enabled
- Window Resolution: 1024 x 768
- PDF viewer (e.g. Adobe PDF Reader, or equivalent)
- JavaScript enabled, for full end-user experience
- Compression/decompression software (e.g. 7zip, winrar, or equivalent)
- Access to the Internet through HTTP/HTTPS
- A valid e-mail address
- Pop-up blockers disabled
- Java Runtime Environment (JRE) 1.6

2 General Functionality

The procurement modules provide the following common behaviour/functionality for all its end-users.

2.1 General usage guidelines

The ePPSS system 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:

#	Title:	CA:	Info:	Tenders submission deadline:	Procedure:	Status:
---	--------	-----	-------	------------------------------	------------	---------

Figure 1: Example of a table header










- The arrows  are used for sorting (in ascending/descending order) the results by the corresponding field. 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:

Table 1: Pagination options

	First Page
	Last Page
	Previous Page
	Next Page

The following buttons are also widely used within ePPSS:

Table 2: Additional options

	Calendar Button. Selecting this button opens a calendar enabling the user to select a date
	Search Button. Selecting this button opens a searching window enabling the user to search for various codes (e.g. CPV and NUTS codes)
	Clear Button. This button clears the selection of the user

2.2 The Pooled procurement Menu functionality

During the creation and manipulation of a Call for Tender, the Pooled procurement Menu contains all available choices to the user. The Pooled procurement Menu is collapsed by default:



Figure 2: The Pooled procurement Menu (collapsed)

If the user selects the Pooled procurement Menu, it will be expanded to show all available functionalities. The user can select any of the provided functionalities:

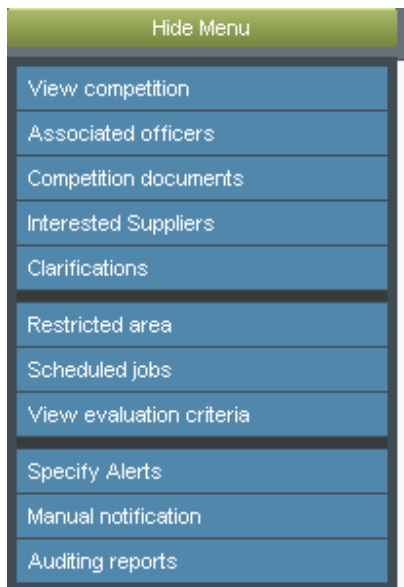


Figure 3: The Pooled procurement Menu (expanded)

Selecting the Pooled procurement Menu, again, will collapse it (Figure 2).

2.3 Main Page

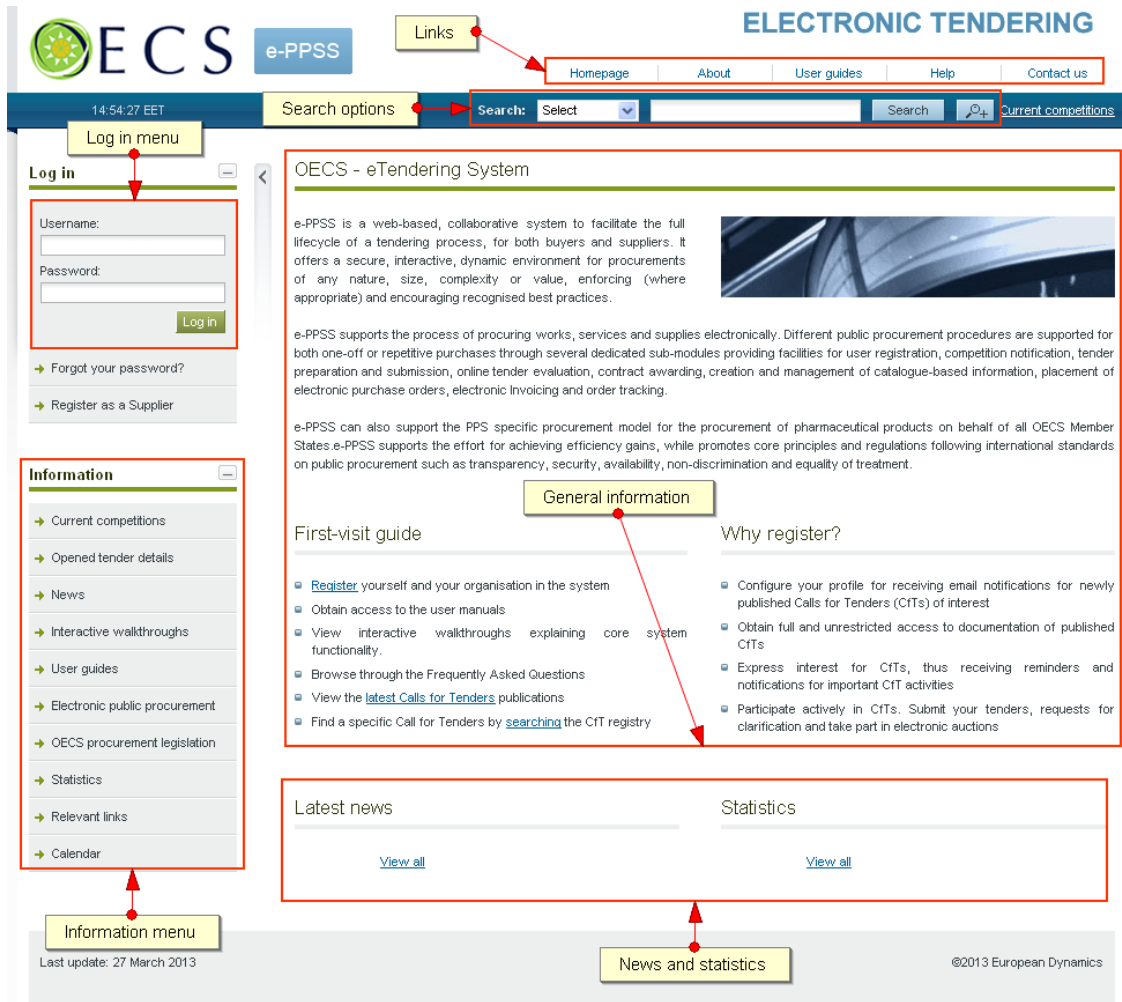


Figure 4: Main page

The main page of the ePPSS system consists of the following elements:

- **Left column**, which contains the Login panel, General Information Panel, and Calendar Panel.
- **Central column**, which contains general information regarding the system, the Suppliers and the users of contracting authority. Furthermore, it lists any uploaded news and also statistical information about the system usage.
- **Constant functionality at the top** of the main page which contains functionalities which are available within all pages of ePPSS.
- **Constant functionality at the bottom** of the main page which contains functionalities which are available within all pages of ePPSS.

The following are the most important sections within the main page.

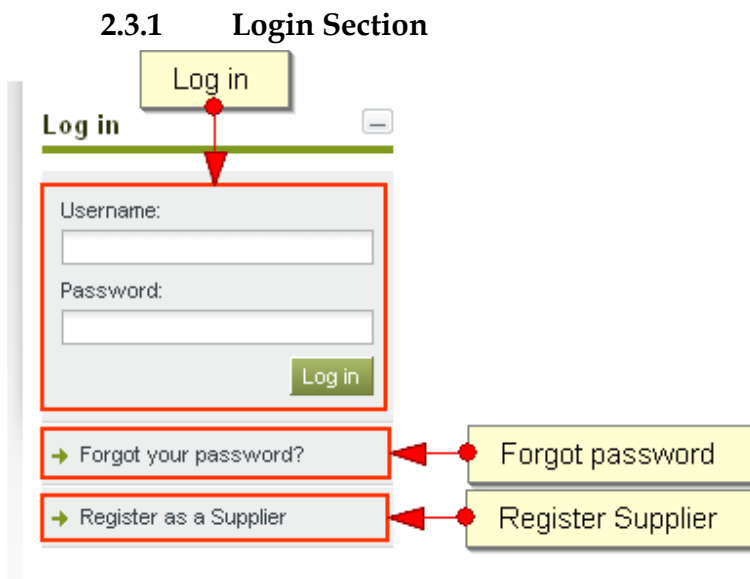


Figure 5: Login panel

In this section, functionality is provided to enable all users (Contracting Authority, Suppliers and Administrators) to login in the system providing that they use the correct credentials (username and password). Furthermore, functionality to recover user's password is included. Finally, functionality for the registration of Suppliers within the system is provided.

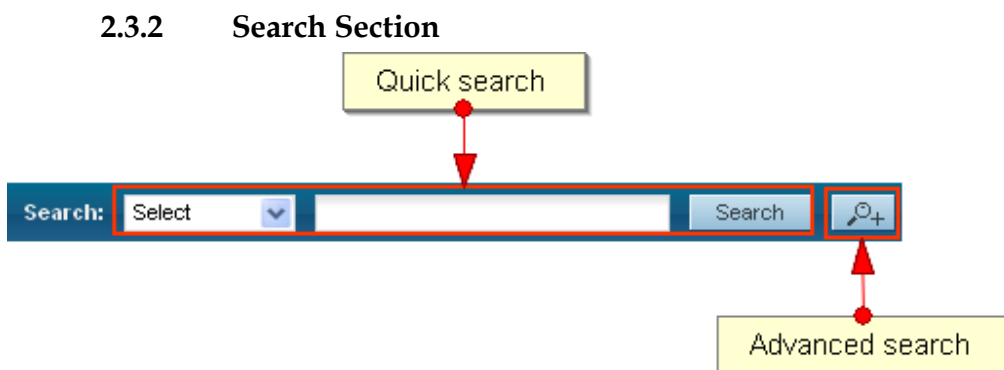



Figure 6: Search panel

The users can use this section to search for Pooled procurement, Organisations and users. Advanced searching functionality, (by selecting the button ) is also provided (Figure 6).

2.4 Login in the system

All users of the ePPSS module should have an appropriate user name and password. In order for a user to login in the system, he must provide his credentials in the login section of the main page:

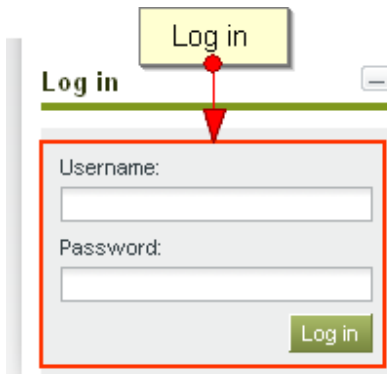


Figure 7: User login

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



Figure 8: Wrong credentials

If the user provides an incorrect password for a username more than 9 times, the user account will automatically get de-activated. In this case, the user should contact the system administrator to re-activate the account:

2.5 Login to the system for the first time

The following steps are available, when the user login to access the ePPSS services 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 system):

Accept agreement

Please read below User Agreement ("license") carefully before using the system.

By using the system, you are agreeing to be bound by the terms of this license.

If you do not agree to the terms of this license, do not use the software. If you do not agree to the terms of the license, please decline the agreement.

[OECS TermsOfUse v2.0.pdf](#)

Accept

Reject

Figure 11: Confirmation of the user agreement

2.6 Logout from the system

The user can exit the ePPSS services by selecting the “Logout” functionality:

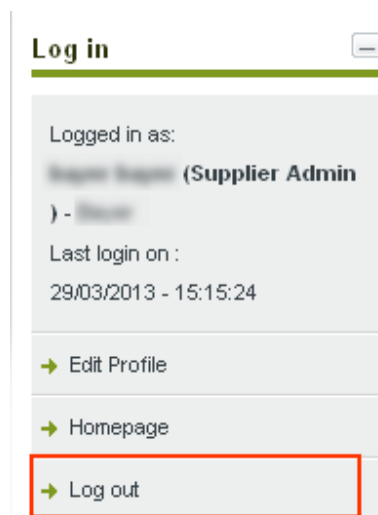


Figure 12: Logout functionality

2.7 Password recovery

The user can recover his password from the “**Forgot your password**” functionality (Figure 8) available from the home page.

Forgot your password?

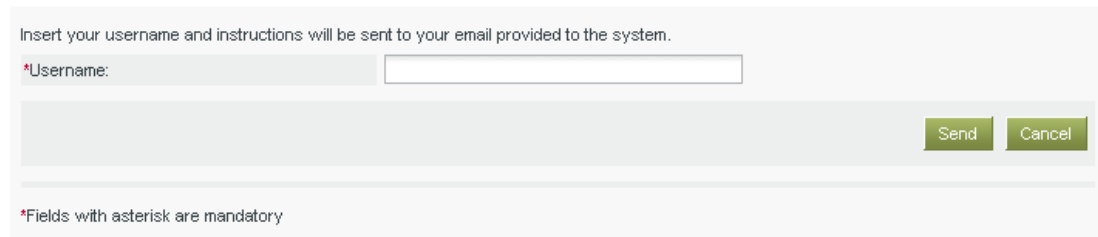


Figure 13: Password recovery/change

If the provided details are valid, the system sends an email to the associated address, containing a transaction number and a unique generated access link:

```
Dear Brenda Cox,

Go to the following link and insert new password.

You can access the new password section through the following link:
https://www.eecs.com.au/user/prepareResetPassword.do?userID=1006&num=vj4kuzcg95kk

Please note that the field Password is case-sensitive.

*****
IMPORTANT: Actions within e-PPSS 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.

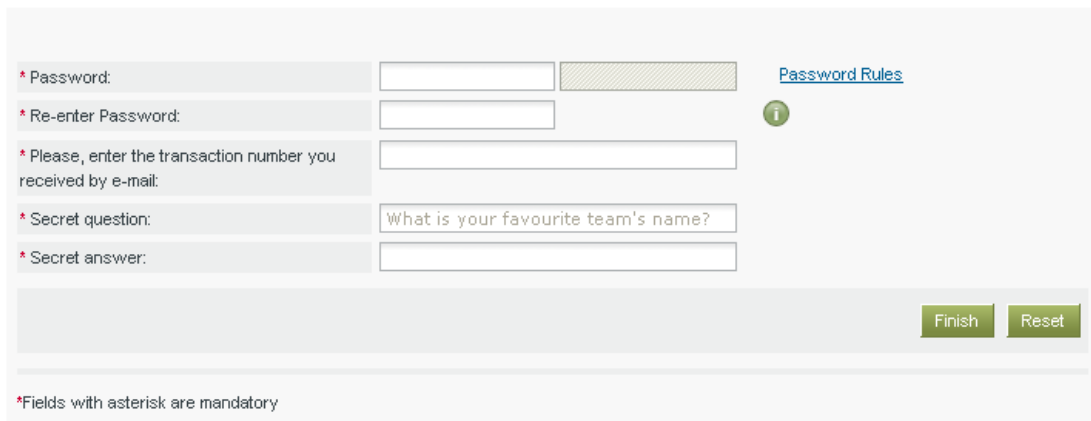
Please do not reply to this mail.
*****
```

Figure 14: email containing a registration transaction and unique access link

In order to reset the password, the user accesses the displayed link. To trigger the password reset functionality, the system requires the user to provide:

- Username
- New password
- Password confirmation
- Secret question response

Reset password



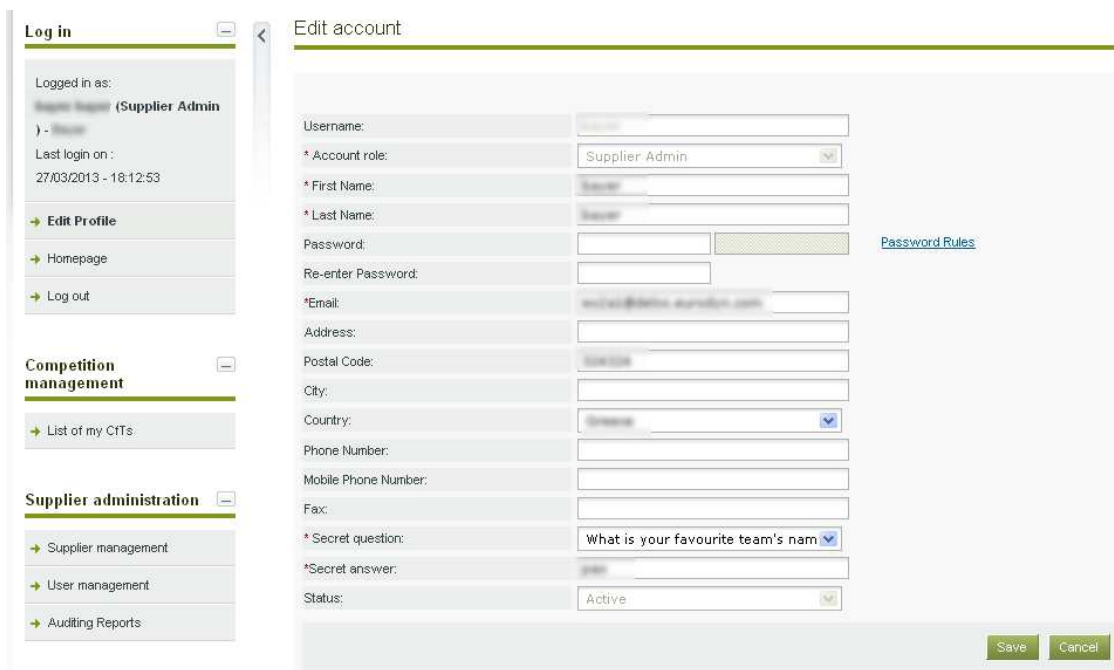
The form contains the following fields and elements:

- * Password:** Text input field with a strength indicator bar.
- * Re-enter Password:** Text input field.
- * Please, enter the transaction number you received by e-mail:** Text input field.
- * Secret question:** Dropdown menu with the selected option "What is your favourite team's name?".
- * Secret answer:** Text input field.
- Buttons:** "Finish" and "Reset" buttons at the bottom right.
- Link:** "Password Rules" link next to the password fields.
- Info:** A green circle with the number "1" next to the "Re-enter Password" field.
- Footnote:** "*Fields with asterisk are mandatory" at the bottom left.

Figure 15: Resetting the password

2.8 Maintenance of user's profile

After successful authentication the user can edit his profile by selecting the **"Edit Profile"** functionality (accessible in the left column menu). The user can update the information fields and then, select the button **"Save"** to store the performed modifications. In case any of the mandatory information is missing the system will prompt the user with an error message.



The form is titled "Edit account" and includes a left sidebar with navigation options. The main form contains the following fields and elements:

- Username:** Text input field.
- * Account role:** Dropdown menu with "Supplier Admin" selected.
- * First Name:** Text input field.
- * Last Name:** Text input field.
- Password:** Text input field with a strength indicator bar.
- Re-enter Password:** Text input field.
- *Email:** Text input field with a placeholder "email@domain.com".
- Address:** Text input field.
- Postal Code:** Text input field.
- City:** Text input field.
- Country:** Dropdown menu with "Country" selected.
- Phone Number:** Text input field.
- Mobile Phone Number:** Text input field.
- Fax:** Text input field.
- * Secret question:** Dropdown menu with "What is your favourite team's name" selected.
- * Secret answer:** Text input field.
- Status:** Dropdown menu with "Active" selected.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.
- Link:** "Password Rules" link next to the password fields.

Left Sidebar:

- Log in**
 - Logged in as: **Supplier Admin**
 - Last login on: 27/03/2013 - 18:12:53
 - Edit Profile**
 - Homepage
 - Log out
- Competition management**
 - List of my CFTs
- Supplier administration**
 - Supplier management
 - User management
 - Auditing Reports

Figure 16: Edit User's Profile

The password should follow a specific configuration. To view the password rules the user should click on the link “**Password Rules**” (Figure 17). 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

Upper case letters	<input type="checkbox"/> Select All	Lower case letters	<input type="checkbox"/> Select All
A	<input checked="" type="checkbox"/>	a	<input checked="" type="checkbox"/>
B	<input checked="" type="checkbox"/>	b	<input checked="" type="checkbox"/>
C	<input checked="" type="checkbox"/>	c	<input checked="" type="checkbox"/>
D	<input checked="" type="checkbox"/>	d	<input checked="" type="checkbox"/>
E	<input checked="" type="checkbox"/>	e	<input checked="" type="checkbox"/>
F	<input checked="" type="checkbox"/>	f	<input checked="" type="checkbox"/>
G	<input checked="" type="checkbox"/>	g	<input checked="" type="checkbox"/>
H	<input checked="" type="checkbox"/>	h	<input checked="" type="checkbox"/>
I	<input checked="" type="checkbox"/>	i	<input checked="" type="checkbox"/>
J	<input checked="" type="checkbox"/>	j	<input checked="" type="checkbox"/>
K	<input checked="" type="checkbox"/>	k	<input checked="" type="checkbox"/>
L	<input checked="" type="checkbox"/>	l	<input checked="" type="checkbox"/>
M	<input checked="" type="checkbox"/>	m	<input checked="" type="checkbox"/>
N	<input checked="" type="checkbox"/>	n	<input checked="" type="checkbox"/>
O	<input checked="" type="checkbox"/>	o	<input checked="" type="checkbox"/>
P	<input checked="" type="checkbox"/>	p	<input checked="" type="checkbox"/>
Q	<input checked="" type="checkbox"/>	q	<input checked="" type="checkbox"/>
R	<input checked="" type="checkbox"/>	r	<input checked="" type="checkbox"/>
S	<input checked="" type="checkbox"/>	s	<input checked="" type="checkbox"/>
T	<input checked="" type="checkbox"/>	t	<input checked="" type="checkbox"/>
U	<input checked="" type="checkbox"/>	u	<input checked="" type="checkbox"/>
V	<input checked="" type="checkbox"/>	v	<input checked="" type="checkbox"/>
W	<input checked="" type="checkbox"/>	w	<input checked="" type="checkbox"/>
X	<input checked="" type="checkbox"/>	x	<input checked="" type="checkbox"/>
Y	<input checked="" type="checkbox"/>	y	<input checked="" type="checkbox"/>
Z	<input checked="" type="checkbox"/>	z	<input checked="" type="checkbox"/>

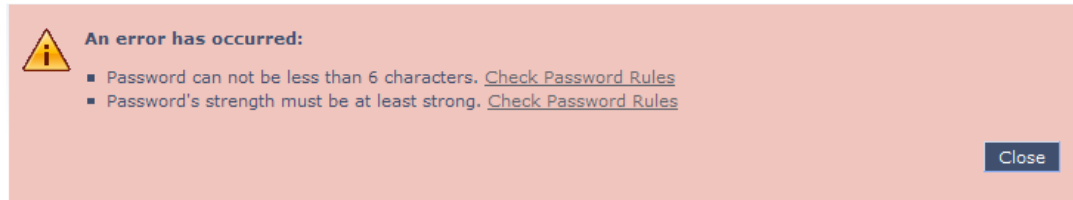
Numbers	<input type="checkbox"/> Select All
0	<input checked="" type="checkbox"/>
1	<input checked="" type="checkbox"/>
2	<input checked="" type="checkbox"/>
3	<input checked="" type="checkbox"/>
4	<input checked="" type="checkbox"/>
5	<input checked="" type="checkbox"/>
6	<input checked="" type="checkbox"/>
7	<input checked="" type="checkbox"/>
8	<input checked="" type="checkbox"/>
9	<input checked="" type="checkbox"/>

Other characters	<input type="checkbox"/> Select All
!	<input checked="" type="checkbox"/>
@	<input checked="" type="checkbox"/>
#	<input checked="" type="checkbox"/>
\$	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>

Allowed login failures	10
Password lifetime (in months)	Never
Password Min length	6
Password Max length	20
Password history	<input checked="" type="radio"/> Activate <input type="radio"/> Deactivate
Password strength	weak

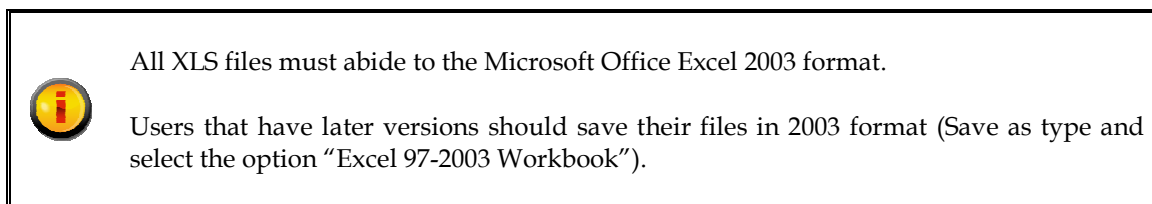
Figure 17: Password Configuration Rules

In case the password does not follow the password configuration the following message appears.



2.9 XLS file format support

All XLS files uploaded to the ePPSS system must abide to the Microsoft Office Excel 2003 format.



3 Registration of Supplier

All Suppliers are able to self-register to use the ePPSS system. In order for an Supplier to register in the system, the user should select the option “**Register as Supplier**” from the “**Login Panel**” of the main page (Figure 18).

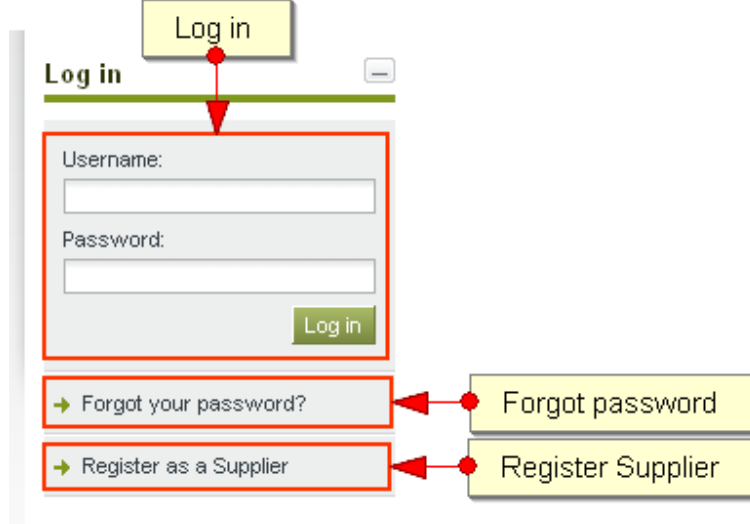


Figure 18: Register as Supplier

In the first phase of the registration procedure the user registers his organisation by providing the following mandatory information (Figure 19):


- Organisation Name
- Company type
- At least one of the:
 - Company Registration Number,
 - VAT Number or,
 - Business identification number
- Country
- Address
- Postal Code
- City
- Email
- Phone Number
- Fax (optional)
- Manufacturer /Distributor option
- Captcha code

Register Supplier

Step 1: Organisation Details

* Organisation name :


* Supplier Abbreviation:

* Company type: 

If you selected "Sole Trader" from Company type above then please enter any information if applicable to you to assist us in identifying you. If you have selected any other Company Type then as a minimum requirement you must complete at least one of the following to register:

Company Registration Number:


VAT number:

D-U-N-S number: 

* Address:

* Postal Code:


* City:

* Country: 

* Email:

* Phone Number:

Fax:



* Manufacturer/Distributor 

* Please type the code shown below:


*Fields with asterisk are mandatory

Figure 19: Registration of organisation

In order to proceed to the next phase, the user should have also typed, in the provided text field, the visual **CAPTCHA** code displayed by the system on the screen. Selecting the **"Refresh"** button updates the code (Figure 19). Finally, the user should select the button **"Validate and Continue"** to continue the registration process.

The next step (optional) is the association of CPV codes of interest with the organisation (Figure 20). The user can associate CPV codes by the use of the  button. The button  is used to delete a selected CPV code.



Register CPV Codes

 The Common Procurement Vocabulary (CPV) establishes a single classification system for public procurement aimed at standardising the references used by contracting authorities and entities to describe the subject of procurement contracts. The main vocabulary is based on a tree structure comprising 8 digit codes associated with wording that describes the type of supplies, works or services forming the subject of the contract. The CPV is maintained by the European Commission of the European Union. The CPV codes of interest are **optional** for the registration of a Supplier. When an open public procurement competition is published, the system will automatically notify via email all Suppliers whose CPV's of interest match the CPV codes of the competition itself.

[Close](#)

Step 2: Register CPV Codes

CPV Codes of interest:

[Next](#)
[Back](#)
[Cancel](#)

Figure 20: Registration of CPV codes

In order to continue, the user should select the “**Next**” button. The button “**Back**” returns the user to the previous phase (Figure 19).

At the final phase the user registers the administrator of the Supplier (Supplier Admin). The following details are mandatory (Figure 21):

- First Name
- Last Name
- Username
- Password
- Email
- Country
- Preferred language of GUI
- Secret question
- Secret answer

Furthermore, the following details are optional (Figure 21):

- Address
- Postal Code
- City
- Phone number
- Mobile number
- Fax

Register Administrator

Step 3: Create Administrator Account

*First Name:	<input type="text"/>	
*Last Name:	<input type="text"/>	
*Username:	<input type="text"/>	
*Password:	<input type="password"/>	Password Rules
*Re-enter Password:	<input type="password"/>	
*Email:	<input type="text"/>	
Address:	<input type="text"/>	
Postal Code:	<input type="text"/>	
City:	<input type="text"/>	
*Country:	<input type="text" value="Bahrain"/>	<input type="button" value="v"/>
Phone Number:	<input type="text"/>	
Mobile Phone Number:	<input type="text"/>	
Fax:	<input type="text"/>	
*Secret question:	<input type="text" value="Select"/>	<input type="button" value="v"/>
*Secret answer:	<input type="text"/>	

*Fields with asterisk are mandatory

Figure 21: Registration of Supplier admin

In order to finalise the registration process the user selects the button **“Finish”**. A message confirming the successful registration of the Supplier will be displayed:



Figure 22: Confirmation of successful registration of the Supplier

The system will send an email to the user containing details of how to access the system. Section 2.5 contains instructions on how to access the system for the first time.

The registration of an Supplier needs to be validated by the System Administrator. Until then, the following message appears when the Supplier accesses the system:

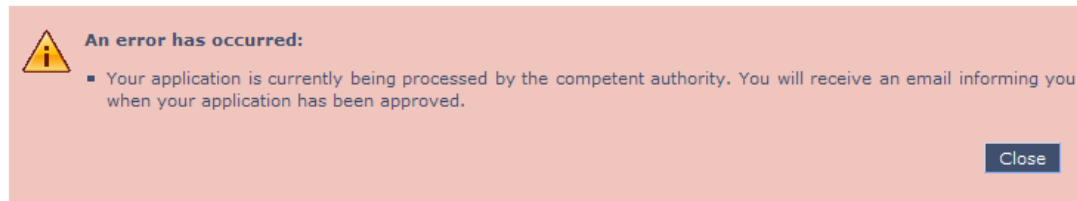


Figure 23: Pending validation by the System Administration

If this warning message occurs please contact the System Administrator, in order to activate the organisation account.

The Users with a role of Supplier Organisation Administrator can perform the following activities for the management of their organisation:

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



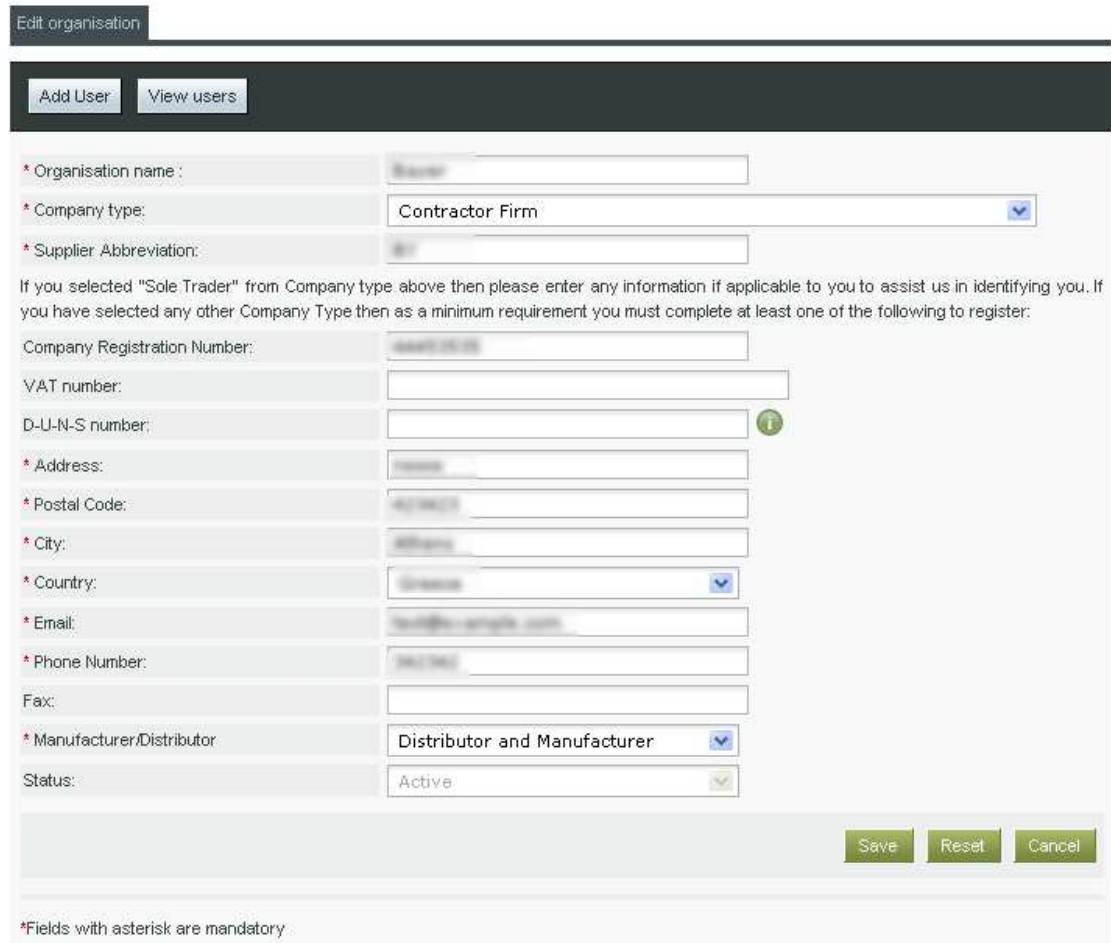
Edit organisation Edit CPV Codes View users Add User	
Organisation name :	Beauco
Company type:	Contractor Firm
Supplier Abbreviation:	BEI
Company Registration Number:	44443333
VAT number:	
D-U-N-S number:	
Approval Date:	2008-02-01 12
Approved By:	admin
Address:	France
Postal Code:	42100
City:	Albi
Country:	France
Email:	test@beauco.com
Phone Number:	0612345
Fax:	
Manufacturer/Distributor	Distributor and Manufacturer
Status:	Active

05/06/2013

4.1 Edit organisation details

Selecting the option “**Edit Organisation**” allows the user to edit the organisation’s details:

Edit organisation profile



Edit organisation

Add User **View users**

* Organisation name :

* Company type:

* Supplier Abbreviation:

If you selected "Sole Trader" from Company type above then please enter any information if applicable to you to assist us in identifying you. If you have selected any other Company Type then as a minimum requirement you must complete at least one of the following to register:

Company Registration Number:

VAT number:

D-U-N-S number:

* Address:

* Postal Code:

* City:

* Country:

* Email:

* Phone Number:

Fax:

* Manufacturer/Distributor

Status:


Save **Reset** **Cancel**

*Fields with asterisk are mandatory

Figure 26: Editing Suppliers details

Selecting the button “**Save**” will store the performed modifications, while the button “**Reset**” will reset the performed modifications.

Edit organisation profile


The organisation was updated successfully.
Close

Edit organisation

Add User View users

* Organisation name :

* Company type: Contractor Firm ▼

* Supplier Abbreviation:

If you selected "Sole Trader" from Company type above then please enter any information if applicable to you to assist us in identifying you. If you have selected any other Company Type then as a minimum requirement you must complete at least one of the following to register:

Company Registration Number:

VAT number:

D-U-N-S number: i

* Address:

* Postal Code:

* City:

* Country: Country ▼

* Email:

* Phone Number:

Fax:

* Manufacturer/Distributor Distributor and Manufacturer ▼

Status: Active ▼

Save
Reset
Cancel

*Fields with asterisk are mandatory

Figure 27: Organisation details were successfully updated

4.2 View the users belonging to the Supplier

Selecting the option “View Users” displays all the users registered within the selected Supplier organisation:

View users

#	First Name	Last Name	Organisational role	Country	Status
1			Supplier Admin		

[Add User](#)
[Edit account](#)

1 results in total. Displaying: 1-1

Page 1 of 1

 Active |
  Inactive |
  De-activated

Figure 28: Display of users belonging to the Supplier.

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

Table 3: List of account statuses

	Active
	Inactive
	Deactivated

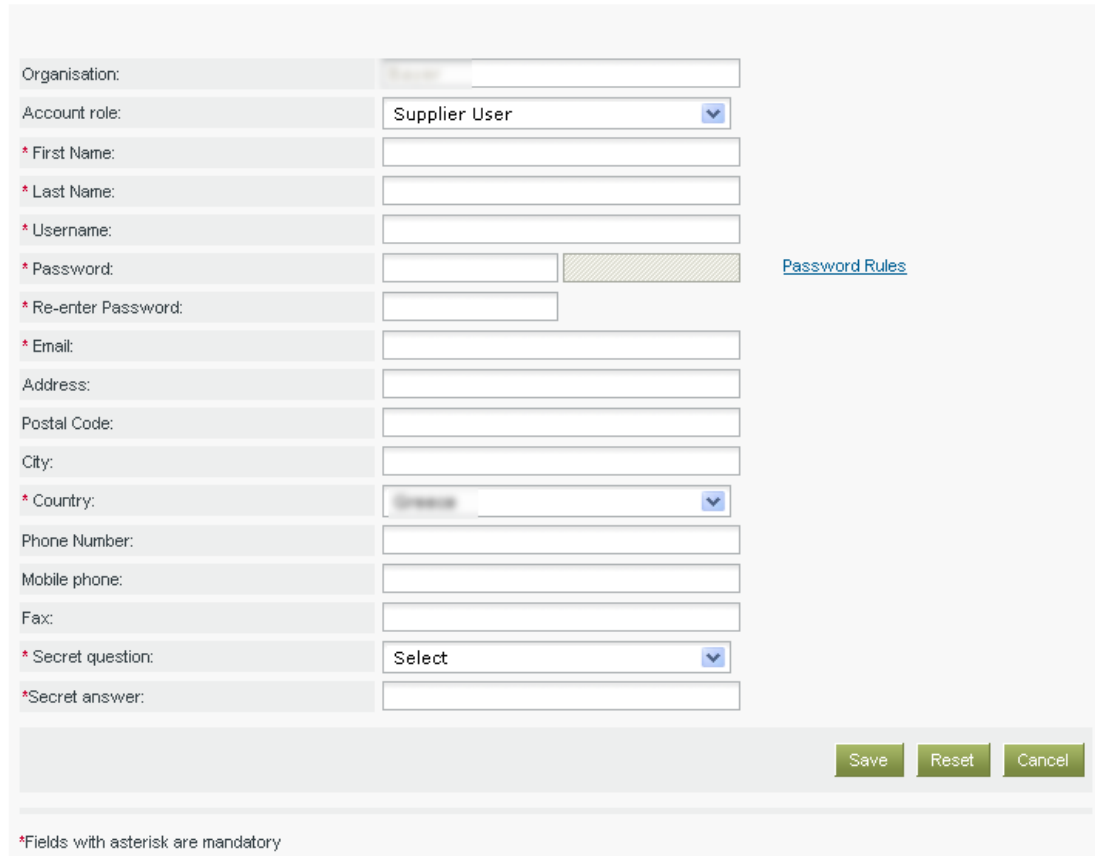
The following user roles are supported:

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

4.3 Add new user in the Supplier organisation

In order to insert new users in the organisation, the user needs to select the option “Add user”. The mandatory information below must be provided:

Add User



Organisation:

Account role:

* First Name:

* Last Name:

* Username:

* Password: [Password Rules](#)

* Re-enter Password:

* Email:

Address:

Postal Code:

City:

* Country:

Phone Number:

Mobile phone:

Fax:

* Secret question:

* Secret answer:

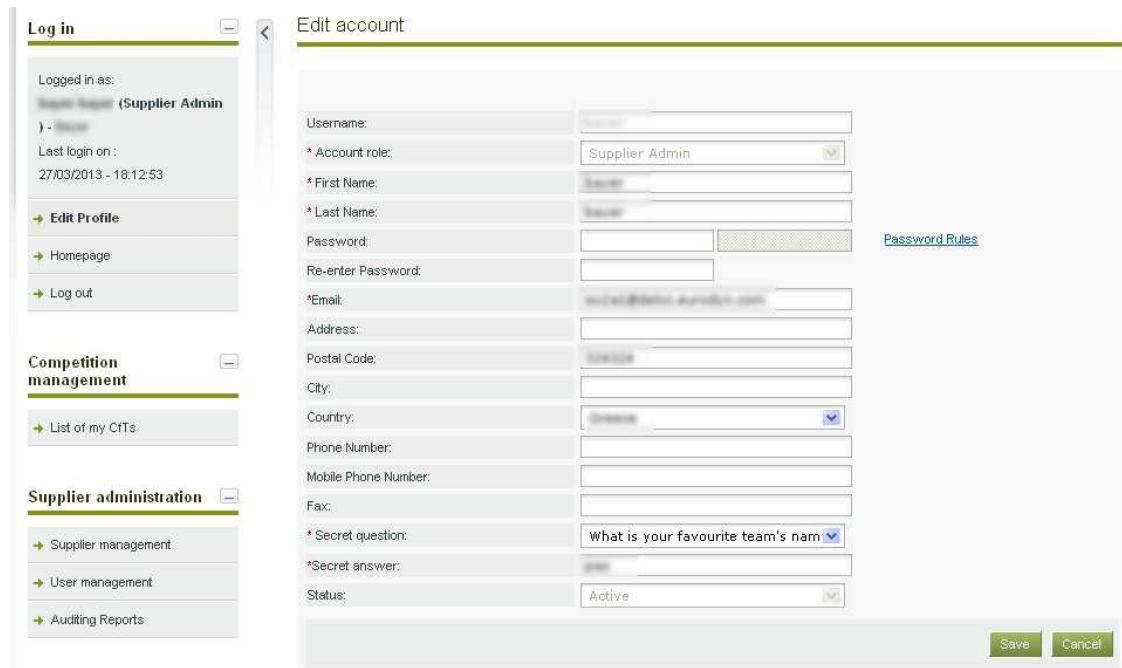
*Fields with asterisk are mandatory

Figure 29: Insert a new user in the organisation

Initially, the account of the new user will be 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 set to active.

4.4 Edit user's details

The user can select the option “**Edit Account**” to edit the details of a specific user. The system will display all user details allowing their modification (Figure 28):



Log in

Logged in as:
Supplier Admin (Supplier Admin)
- Home

Last login on:
27/03/2013 - 18:12:53

→ Edit Profile
→ Homepage
→ Log out

Competition management

→ List of my CFTs

Supplier administration

→ Supplier management
→ User management
→ Auditing Reports

Edit account

Username:

* Account role:

* First Name:

* Last Name:

Password: [Password Rules](#)

Re-enter Password:

* Email:

Address:

Postal Code:

City:

Country:

Phone Number:

Mobile Phone Number:

Fax:

* Secret question:

* Secret answer:

Status:


Figure 30: Editing user details

Selecting the button “**Save**” will update the users details (Figure 30).

4.5 Edit CPV codes

In order to edit the CPV codes associated with the Supplier the user selects the “**Edit CPV codes**” option in Supplier Organisation management page (Figure 25). The system displays the CPV codes which are currently associated with the Supplier (if any):



Register CPV Codes

 The Common Procurement Vocabulary (CPV) establishes a single classification system for public procurement aimed at standardising the references used by contracting authorities and entities to describe the subject of procurement contracts. The main vocabulary is based on a tree structure comprising 8 digit codes associated with wording that describes the type of supplies, works or services forming the subject of the contract. The CPV is maintained by the European Commission of the European Union. The CPV codes of interest are **optional** for the registration of a Supplier. When an open public procurement competition is published, the system will automatically notify via email all Suppliers whose CPV's of interest match the CPV codes of the competition itself.

[Close](#)



Step 2: Register CPV Codes

CPV Codes of interest:

[Next](#)
[Back](#)
[Cancel](#)

Figure 31: Associate CPV codes



The user can add new CPV codes by the use of the  button. The button  is used to delete a selected CPV code.

After modifying the associated CPV codes (Figure 32), the user can select the button “**Finish**” to store his changes.

Edit CPV Codes

Edit CPV Codes

CPV Codes of interest:

[Finish](#)
[Cancel](#)

Figure 32: Edited CPV codes

5 Searching Functionality

The ePPSS system provides “Simple” and “Advanced” search mechanisms. Both functionalities allow searching for Pooled procurement (Pooled procurements), Organisations and Users.

5.1 Simple Search

The simple search functionality covers searching for available Pooled procurement (Pooled procurement), registered Organisations and registered Users.

Simple search queries are performed by:

1. Selecting the type of searching (Competitions, Organisations, and Users) from the selection list.
2. Providing the full name of the required record or part of it using the “*” wildcard.
3. Selecting the button “Search”.

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

Search: Competitions Search Current competitions

Simple search

Search results							
#	Title:	CA:	Info:	Tenders submission deadline:	Procedure:	Status:	Estimated total contract value:
1	20130327 PPS GV1	PPS 1		08/05/2013 00:00:00	PPS procurement	pooled Awarded	
2	20130327 PPS 4	PPS 1		08/05/2013 00:00:00	PPS procurement	pooled Evaluation	
3	20130327 PPS 3	PPS 1		08/05/2013 00:00:00	PPS procurement	pooled Evaluation	
4	20130327 PPS 2	PPS 1		08/05/2013 00:00:00	PPS procurement	pooled Evaluation	
5	20130327 PPS 1	PPS 1		08/05/2013 00:00:00	PPS procurement	pooled Evaluation	
6	20130322 PPS 2	PPS 1		31/03/2013 00:00:00	PPS procurement	pooled Tender submission	
7	20130322 Sp PPS 1	PPS 1		03/05/2013 00:00:00	PPS procurement	pooled Evaluation	
8	20130321 PPS 1	PPS 1		02/05/2013 00:00:00	PPS procurement	pooled Awarded	
9	20130313 PPS - 2	PPS 1		24/04/2013 00:00:00	PPS procurement	pooled Tender submission	
10	20130314 PPS 5	PPS 1		25/04/2013 00:00:00	PPS procurement	pooled Awarded	

23 results in total. Displaying: 1-10

Page 1 of 3

Figure 33: Simple search for Pooled procurement

5.2 Advanced search

The advanced search functionality enables searching for Pooled procurement (Pooled procurements), Organisations and Users. In order to perform an advanced search query, the user should:

1. Select the type of the search by using the appropriate button
2. Provide information in one or more fields (use of * wildcard is also enabled).
3. Select the button “**Search**”

The results, if any, will be presented in a tabular form.

Advanced search



Search for: ☒ Competition ☐ Organisation ☐ User

Title

Competition reference

Name of contracting authority

Competition status

Procurement type

Procedure

Deadline for tender submission From: To:

Description

Maximum characters: 2000.

CPV codes

NUTS codes

Estimated total contract value (USD) Min: Max:

Tenders opening date From: To:

Figure 34: Advanced search for a Pooled procurement

In order to search for an organisation, the user needs to first provide the organisation type (Contracting Authority). Figure 35 provides an example of a search query for Contracting Authorities.

Advanced search

Search for: ☐ Competition ☒ Organisation ☐ User

Organisation name:

Organisation abbreviation:

City:

Address:

Figure 35: Advanced search for a Contracting Authority

In order to search for a specific user of an organisation, the organisation type (Contracting Authority and Supplier) must be selected.

Advanced search

Search for: ☐ Competition ☐ Organisation ☒ User

User's type of organisation: ☐ Supplier ☒ Contracting authority

First Name:

Last Name:

Username:

Email:

Figure 36: Advanced search for Contracting Authority users

When searching for user's of Supplier organisations the returned results will include only users from the actor's own organisation. The security applied does not allow for a Supplier user to be able to search for other Supplier's or Supplier user's.

Advanced search

Search for: ☐ Competition ☐ Organisation ☒ User

User's type of organisation: ☒ Supplier ☐ Contracting authority

First Name:

Last Name:

Username:

Email:

Figure 37: Advanced search for user of the Supplier

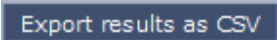
5.3 Latest Pooled procurement search

In order to view the latest Pooled procurements published within the service, the user can click on the “Latest Pooled procurements”, as depicted in . This will present automatically the list of the latest Pooled procurements that are available to the user (depending on his/her access rights).



Figure 38: Latest Pooled procurement search

5.4 CSV export

In order to download the search results with the retrieved list of users/organisations, the user can click button **Export Results as CSV**. 

The exported file includes the full details of the organisation or user accounts exported eg. name, username, department and organisation they belong to, status of system registration, system role, phone and fax numbers including mobile, full postal address, email address, and registration validity period.

6 View Pooled procurement Workspace

In order for the user to preview the details of the call for tender (Pooled procurement) he needs to select the option “**View Pooled procurement**” from the **Pooled procurement Menu** (Figure 39).

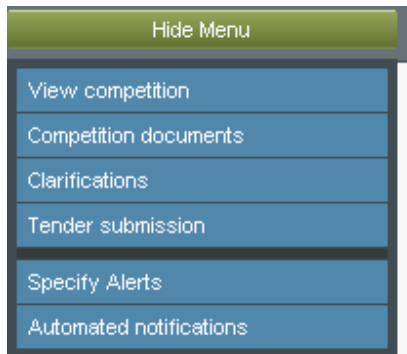


Figure 39: Pooled procurement Menu

The system will display all details (Figure 40) of the particular Pooled procurement (e.g. Title, information regarding associated deadlines, etc).

View Competition details

Competition: 20130328 SP PPS 3		Show Menu
Tender submission deadline in (days/hours):	40/12	
Name of contracting authority:	WILL	
Title:	20130328 SP PPS 3	
Competition reference:	28-03-3	
Description:	WILL	
Procurement type:	Supplies	
Procedure:	PPS pooled procurement	
CPV Codes:	33000000-Medical equipments, pharmaceuticals and personal care products	
Deadline for receipt of tenders / PQQ:	09/05/2013 00:00	
End of clarification period:	18/04/2013 00:00	
Allow suppliers to upload attachments to clarification questions:	Yes	
Tenders opening date:	09/05/2013 01:00	
Contract From:	31/03/2013 00:00	
Contract To :	26/08/2016 00:00	
Funded by Global Fund:	Yes	

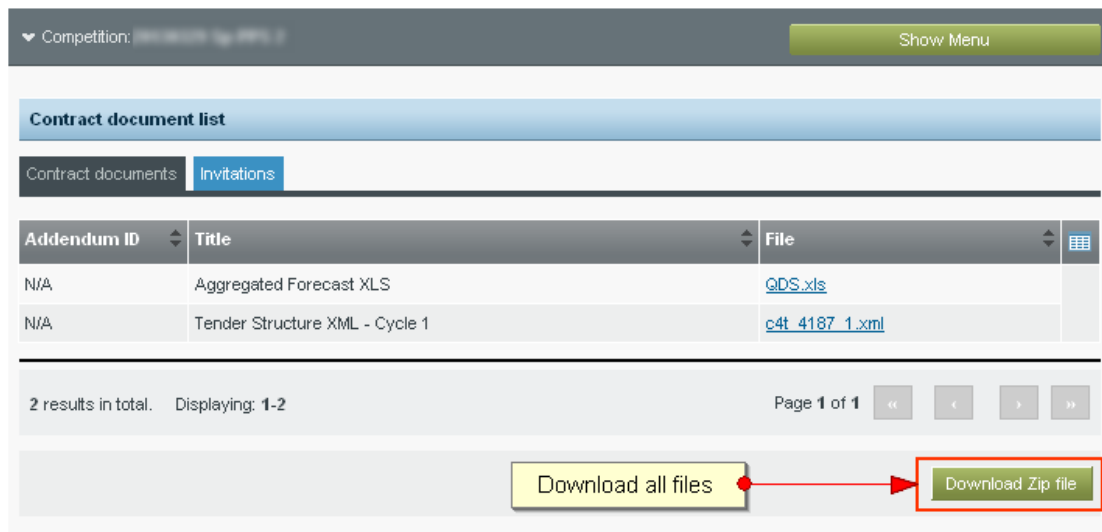
Figure 40: View Pooled procurement workspace

7 View Pooled procurement Documents

In order for the user to preview and download all documents associated with the particular Pooled procurement (i.e. publication notices being published for this call), he needs to select the option “**Competition documents**” from the **Pooled procurement Menu** (Figure 39).

The system displays all contract documents which are associated with the Pooled procurement. The tab “**Contract document**” (Figure 41) contains a list of all documentation created by the buying organisation that relates to the specific pooled procurement. The user may download all files in a compressed file by clicking the “Download Zip file” button

Notice & Contract Documents



Competition: [dropdown] Show Menu

Contract document list

Contract documents | **Invitations**

Addendum ID	Title	File
N/A	Aggregated Forecast XLS	QDS.xls
N/A	Tender Structure XML - Cycle 1	c4t_4187_1.xml

2 results in total. Displaying: 1-2

Page 1 of 1

Download all files → Download Zip file

Figure 41: Contract documents

From tab “Invitations” the user may view the details of the invitation dispatched by the buying organisation.

Notice & Contract Documents

▼ Competition
Show Menu

Invitations

Contract documents
Invitations

1. Invitation to tender for:

Invitation subject:	Invitation to tender for:
Invitation body:	<p>The OECS/PPS, as procurement agent for the ministries of health of nine (9) OECS countries, invites sealed tenders from your company for the supply of pharmaceuticals, medical supplies, x-ray supplies and other medical products. Start Date : 29/03/2013 End Date : 10/05/2013 Closing Time : 00:00 Hrs Opening Time : 10/05/2013 01:00:00 Award Announcement : For off-line Tenders (discouraged) your company must return three (3) items before the Closing Date of 10/05/2013: a. electronic device with removable storage b. a printed hard copy with the exact data contained in the electronic device with removable storage c. Compliance Letter</p>
Attachment:	

Deadline for tender submission

Date:	10/05/2013
Time:	00:00

Request for clarification

To:	19/04/2013 00:00
-----	------------------

Figure 42: Invitation

8 Clarifications

In order to create a clarification request and to preview a clarification response, the user needs to select the option “**Clarifications**” from the “**Pooled procurement Menu**” (Figure 43). This option is available in the “**Pooled procurement Menu**”, during the clarification period.

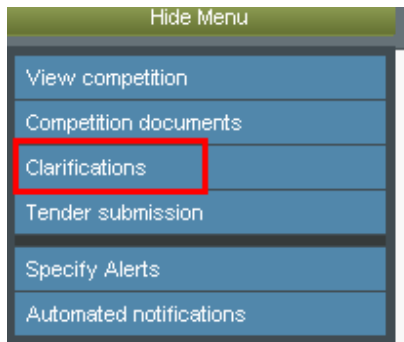


Figure 43: Pooled procurement Menu, option “Clarifications”

8.1 Create a clarification request

In order to create a clarification request, the user selects the tab “**Requests for Clarification**” from the main Clarifications page (Figure 44).

Clarifications

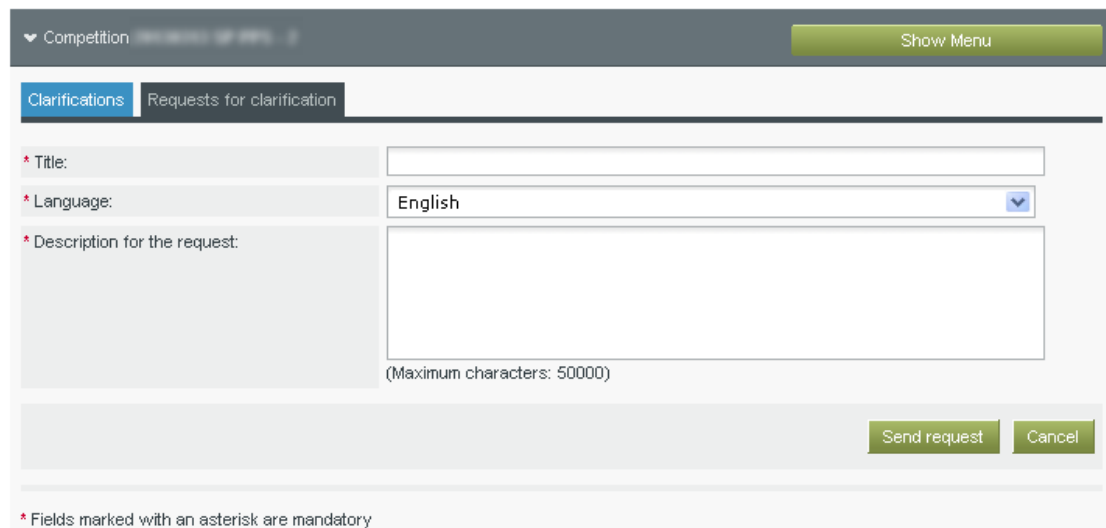


Figure 44: Pooled procurement Clarifications

The user completes the request for clarification by providing the following information:

- Title
- Language
- Description for the request

- A file attachment for the request (optional and applies only if this has been allowed by the Buying organisation)

Selecting the button “**Send Request**” sends the request to the tender coordinator.

8.2 View a clarification response

The user can visualise a clarification response only after it is published by the Procurement Officer. A list of all clarification responses is displayed in the “**Clarifications**” tab of the main Clarifications page.

In order to preview the content of the response, the user selects the displayed title. Then, the system expands the details of the response (Figure 45):

- Description for the request
- Procurement Officer’s clarification response
- Attachment (if exists)

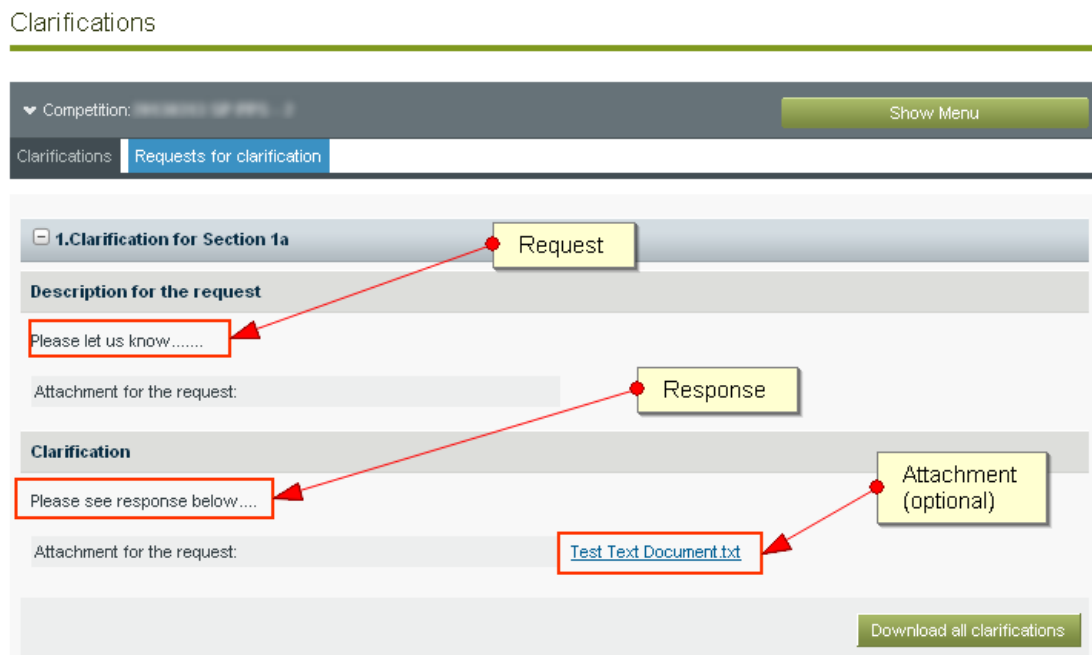


Figure 45: Response to a clarification request

Selecting the button “**Download all clarifications**” enables to download an archive file with the details of all clarification requests submitted and their associated responses.

8.3 Evaluation clarifications

Evaluation clarifications are requests submitted by the Contracting Authority in the context of specific Pooled procurement during the evaluation phase. To preview any evaluation clarification request the user needs to select “Clarifications” option found under the Pooled procurement menu (Figure 43). By selecting the tab “Evaluation Clarifications”, a list of all the evaluation clarifications is displayed (Figure 46).

Clarifications

Competition: 20130416 SP PPS 1
Show Menu

Clarifications
Evaluation Clarifications

Select	Clarification ID	Title of request	Description	Date and Time	Status	
<input type="radio"/>	N/A	Please clarify your offer for D13-0416	Clarification sought	2013/04/16 15:05:35		

1 results in total.
Displaying: 1-1
Page 1 of 1
<<
<
>
>>

View clarification
Answer clarification request

*The clarification was received offline

☒ Answered
☐ Unanswered

Figure 46: List of evaluation requests

The user can answer to the clarification request by selecting the “Answer Clarification Request”. The user completes the clarification by providing his response in the “Clarifications” text area.

Clarifications

▼ Competition: 20130416 SP PPS 1

Show Menu

Evaluation Clarifications

Edit/Answer request for clarification

Requestor name:

Requestor name

Title:

Please clarify your offer for D13-1476

* Description of the clarification:

Clarification sought

(Maximum characters: 50000)

* Clarifications:

1999 remaining characters

Save

Cancel

*If you attach a new file the previous will be overwritten

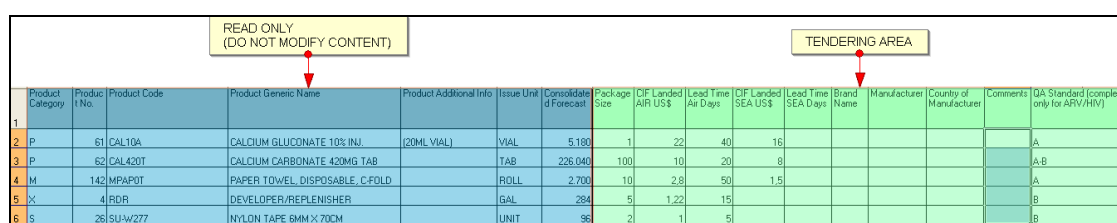
Figure 47: Evaluation clarification response

9 Creation of a tender

The tender is created by the Supplier following a sequence of steps described below that enable the user to prepare, encrypt and securely upload the tender to the ePPSS system. A Supplier may submit a tender via online means, or send it offline to the PPS authority. The latter approach however is discouraged.

9.1 The QDS

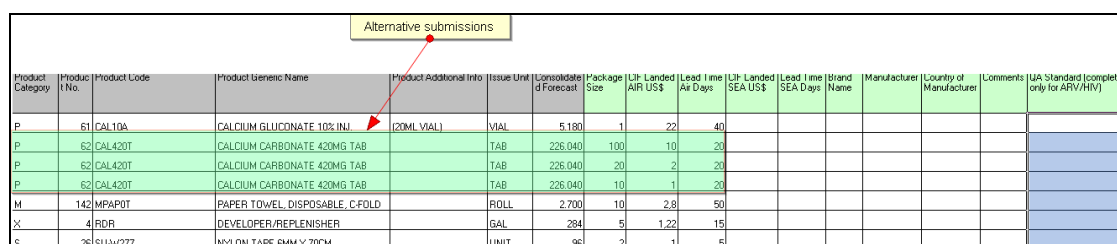
As described in section 7, the user may download the QDS template for each pooled procurement competition through the “Contract documents” section. The user will open the template file and start populating XLS columns H to Q. Column Q is to be populated only in case of ARV/HIV medicine.



Product Category	Product No.	Product Code	Product Generic Name	Product Additional Info	Issue Unit	Consolidated Forecast	Package Size	CIF Landed Air US\$	Lead Time Air Days	CIF Landed Sea US\$	Lead Time Sea Days	Brand Name	Manufacturer	Country of Manufacturer	Comments	QA Standard (complete only for ARV/HIV)
1																
2	P	61	CAL10A	CALCIUM GLUCONATE 10% INJ. (20ML VIAL)	VIAL	5,180	1	22	40	16						A
3	P	62	CAL420T	CALCIUM CARBONATE 420MG TAB	TAB	226,040	100	10	20	8						A,B
4	M	142	MPAPOT	PAPER TOWEL, DISPOSABLE, C-FOLD	ROLL	2,700	10	2,8	50	1,5						A
5	X	4	RDR	DEVELOPER/REPLENISHER	GAL	284	5	1,22	15							B
6	S	26	SUW277	NYLON TAPE 6MM X 70CM	UNIT	96	2	1	5							B

Figure 48: Example of QDS file

In case a user wishes to submit multiple offers of the same item then the user must copy/paste the whole row of the item as many times as the alternatives that s/he wishes to offer.



Product Category	Product No.	Product Code	Product Generic Name	Product Additional Info	Issue Unit	Consolidated Forecast	Package Size	CIF Landed Air US\$	Lead Time Air Days	CIF Landed Sea US\$	Lead Time Sea Days	Brand Name	Manufacturer	Country of Manufacturer	Comments	QA Standard (complete only for ARV/HIV)
P	61	CAL10A	CALCIUM GLUCONATE 10% INJ. (20ML VIAL)	VIAL	5,180	1	22	40								
P	62	CAL420T	CALCIUM CARBONATE 420MG TAB	TAB	226,040	100	10	20								
P	62	CAL420T	CALCIUM CARBONATE 420MG TAB	TAB	226,040	20	2	20								
P	62	CAL420T	CALCIUM CARBONATE 420MG TAB	TAB	226,040	10	1	20								
M	142	MPAPOT	PAPER TOWEL, DISPOSABLE, C-FOLD	ROLL	2,700	10	2,8	50								
X	4	RDR	DEVELOPER/REPLENISHER	GAL	284	5	1,22	15								
S	26	SUW277	NYLON TAPE 6MM X 70CM	UNIT	96	2	1	5								

Figure 49: Alternative item submissions

Aside the possibilities of rejecting a tender as a whole, the system will reject specific products offered by a supplier for the following reasons:

- “Package size” is missing or is not a number
- “CIF Landed Air US\$” and “CIF Landed Sea US\$” information is missing or are not numbers
- In case a Supplier does not provide a (valid) “Package size” and (valid) price information for a product, this is considered as if no offer has been submitted for it
- Information in columns A to G is altered in any way (apart from adding rows of valid/requested products)
- In case the procurement relates to ARV/HIV products, column Q “QA Standard” is not provided or is not a valid code
- In case the procurement relates to medical products (i.e. not ARV/HIV), column Q “QA Standard” is provided with a valid code



System will accept only EXCEL files in the MICROSOFT 2003 XLS format. In case you are using a later MICROSOFT OFFICE version, or similar suite, please make sure that when saving your file the selected format is “.XLS”. Any other format (e.g. “.XLSX”) shall be automatically rejected by the system.



System will NOT accept any virus infected files for evaluation. Any tender that will be found to contain a virus will be automatically discarded from the evaluation process.

9.2 Prepare online tender

Once the QDS is populated by the supplier, including all mandatory information for all products the supplier intends to bid, the user may proceed to create a valid tender for the ePPSS system in two manners. Either create an online tender or create an offline one. This section describes the process for creating an online tender, through the following steps:

9.2.1 Online tender preparation tool

- Click on the “Tender submission” option of the competition Menu (Figure 50).

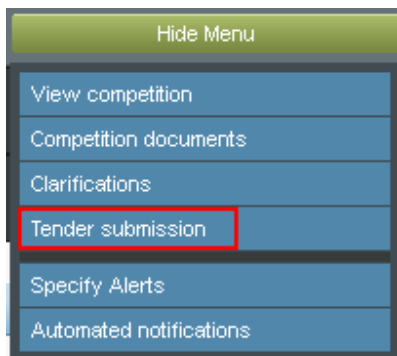



Figure 50: Tender submission option of competition menu

- Click on the “Answer questions online” link (Figure 51).


View Tenders

 We recommend that you submit your tender well in advance of the deadline. This will give you sufficient time to resolve any technical or network issues which may prevent your tender being transmitted. Click [here](#) for more information.
To complete your tender response you will need to have JAVA installed on your computer.
[Click here to check if you have Java installed](#)

[Close](#)

▼ Competition: 20130408 Sp PPS 2 [Show Menu](#)

Answer questions online: [Answer questions online](#)



Link for online tender

Answer questions offline: [Download Evaluation Criteria](#) [Download Preparation tool](#)

List of draft Tenders (created online)

#	Created by	Creation date	Last edited
Edit Remove			

Cycle 1

List of submitted Tenders

#	Submitted by	T/P receipt ID	T/P submission time	Conformance Checks
Upload tender package Remove				




 All items submitted/Contents Verified |
  Additional items will be needed
 Missing items/UnVerified Content/Late Submission

Figure 51: Online tender creation

- The browser downloads the tender preparation tool, which may beforehand download the Java Runtime Environment (or an update) depending on the end-user PC configuration. After downloading, the following screen should be displayed (Figure 52).

View Tenders

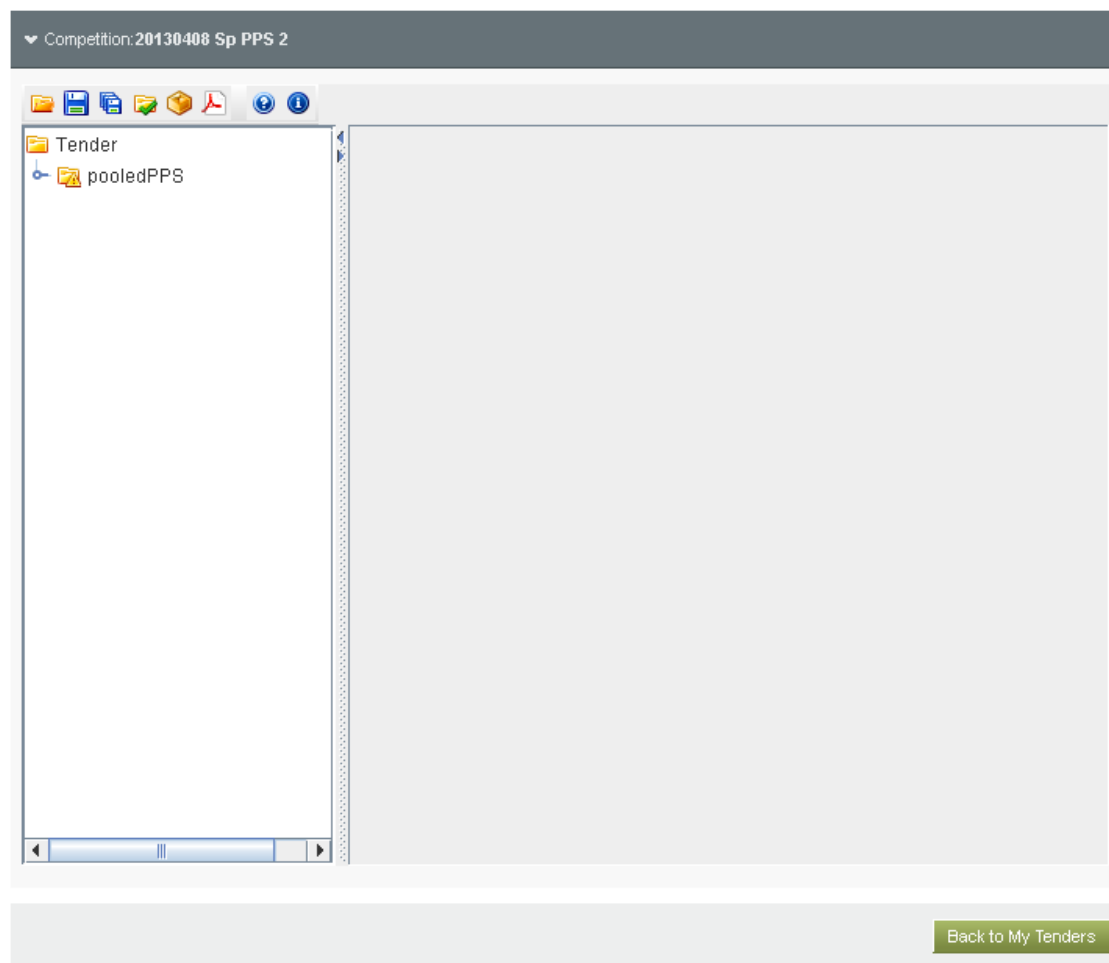


Figure 52: Online tender creation tool

9.2.2 Supplier responses to tender question

- After expanding the “pooledPPS” directory and access its “Section: Complete Tender for PPS pooled procurement” sub-directory, the following screen should be presented (Figure 53).

View Tenders

Competition: 20130408 Sp PPS 2

Complete Tender for PPS pooled procurement

* Completed Data Quotation Sheet XLS

Attach file Max size: 10 MB

* Validity expiration date of the tender

Relevant document: **Attach file**

Completed Criteria: 0/2 **Save**

Back to My Tenders

Figure 53: Expanded “pooledPPS” section

- The user should click the “attach file” button in the first criterion in order to locate the completed QDS file, as created following the steps of section 9.1.
- The user should define the date of expiration of the tender’s validity in the second criterion. If deemed necessary, a supporting document could be uploaded against the second criterion.

9.2.3 Save a tender

- Once the above is done, the user should save the tender using the Save or Save As options (Figure 54). The tender should be saved at a local directory of the user’s PC, since at this stage the tender is not encrypted (i.e. only encrypted tenders are uploaded onto ePPSS).

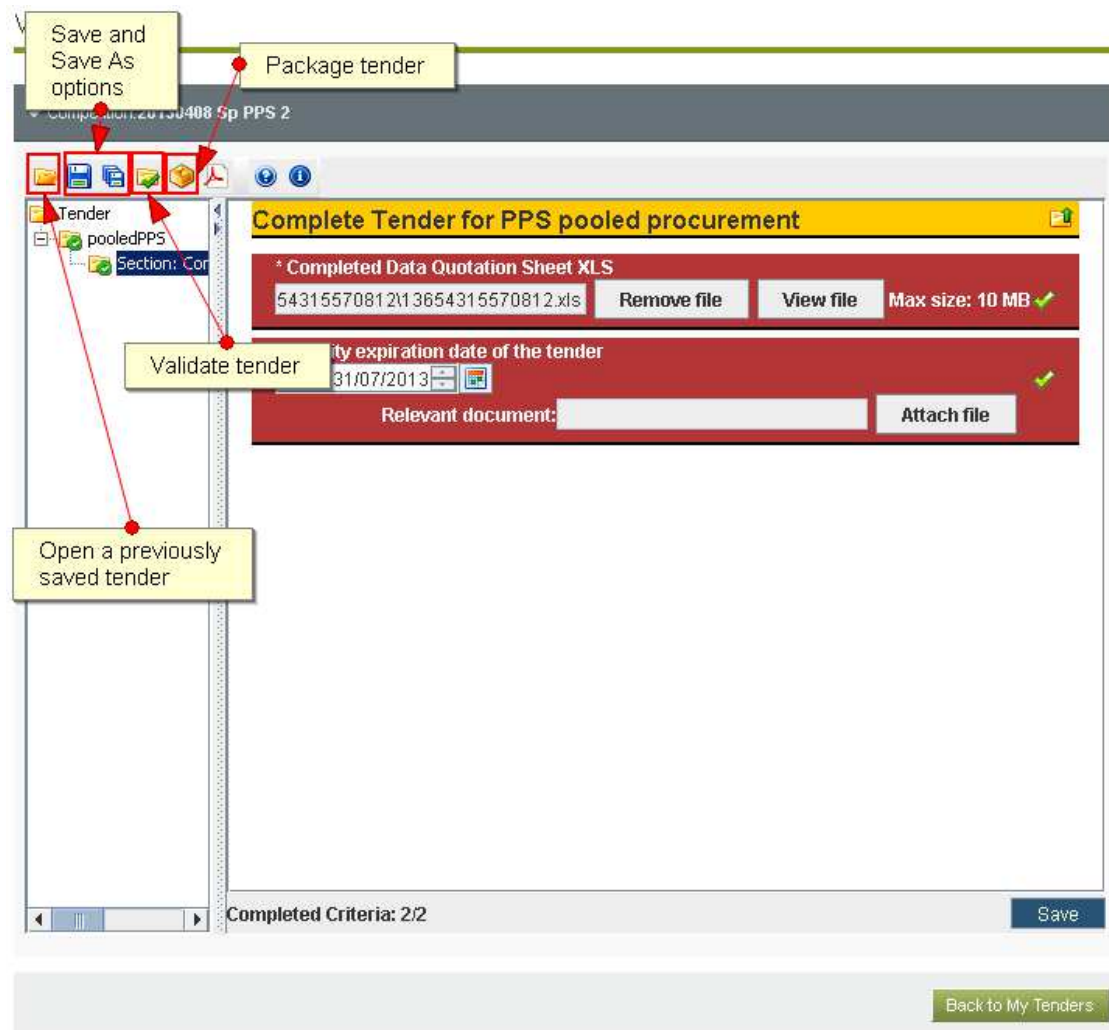


Figure 54: Tender preparation tool options

- Upon a successful saving action, the system will report "Tender saved successfully".
- At this stage the user may validate the tender, or in a future date "open" an already saved tender for further processing.

9.2.4 Package a tender

- Once the user has completed its tender to its totality, the user should click the option to Package the tender (Figure 54).
- Through the above option, the tender will be encrypted and saved under with a new name post-fixed with the test "_TENDER". This file cannot be unlocked and/or viewed by anyone. It will be unlocked only when the PPS staff authorise the unlocking of all tenders as the end of the tender submission period.
- Upon a successful packaging action, the system will report "Packing successful".

9.2.5 Upload a tender

- Once a tender package is created, the user may click on the "Back to My Tenders" link.

- This will direct the user to the tenders page, where if the tender was created in an online manner a new entry will appear under the “list of draft tenders” menu.
- To upload a tender, the user needs to click on the option “Upload tender package”.
- Following two successful confirmation of a number of verification screens (user account, user agreement), the user will need to browser and locate the file to upload (ending with the post-fix “_TENDER.zip”) and then click on the upload button.
- Upon successful uploading, the user will receive a unique Tender Package Receipt ID via a popup message and an email.

9.2.6 Management of a tender

- Until then tender submission deadline is reached, a supplier has the right to remove an already submitted tender.
- If a submitted tender is removed, and until the tender submission deadline, the supplier retains the right to upload a new tender, by following the steps described above.
- Under no circumstances can the supplier download from the system a submitted tender and then open it in order to see the files uploaded. As aforementioned, a submitted tender is an encrypted file that the system is not authorised to decrypt until the tender submission deadline has passed and the PPS staff have instructed the system to proceed to unlocking.

9.2.7 Offline tender preparation tool

- The preparation of an offline tender follows a very similar process to the online one. Exactly the same tool and steps are required, with the only different being in the initial steps of section 9.2.1.
- In particular, after having accessed the tenders page, the user should not click on the “Answer questions online”.
- Instead, the user should download the Evaluation Criteria and the Preparation Tool.
- The Preparation Tool is a zip file that the user should de-archive at a local directory. Then, the tool should be started using the “.exe” file.
- Once the tool is started, the user should click on the “open” option and open the XML file forming the Evaluation Criteria of the competition.
- All rest of the steps for tender preparation, packaging and upload are identical to the online part.

10 Helpdesk contact details

To contact the ePPSS helpdesk you may visit the “Contact Us” link.



Figure 55: Contact us link

The user may either select to fill in an online form and send it through the system, or directly contact the helpdesk team via phone or email.

Contact us

For technical support on the eTendering system you may contact us through email or phone.

Helpdesk contact details	
Email:	nfelicien@oecs.org , bcox@oecs.org
Telephone:	758-455-6381 758-455-6383 758-455-6380 758-452-5895 758-452-5058
Fax:	758-452-0227

Online form	
Your Name: *	<input type="text"/>
Your Organisation: *	<input type="text"/>
User email: *	<input type="text"/>
Phone number:	<input type="text"/>
Subject: *	<input type="text"/>
Question: *	<input type="text"/>
<input type="button" value="Submit"/>	

Figure 56: Contact us form