PUBLIC PROCUREMENT SERVICE (eTendersNI)

ECONOMIC OPERATORS' USER MANUAL

eTendersNI 2024

Date: 26/11/2024
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Contents

Figures

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
MAT	Most 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
WebTPT	Web based Tender Preparation Tool
TCO item	Total Cost Ownership of a product / item. Complex price element.

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1 eTendersNI workflow

1.1 Terminology

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)
- Call for Tender (CfT) is used for the tender opportunities
- **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 eAuction event
- **Bid** corresponds to an offer submitted during an eAuction 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 figure provides a description of the workflow that the Contracting Authority and Economic Operators users can follow through the system in order to perform a complete procurement process.

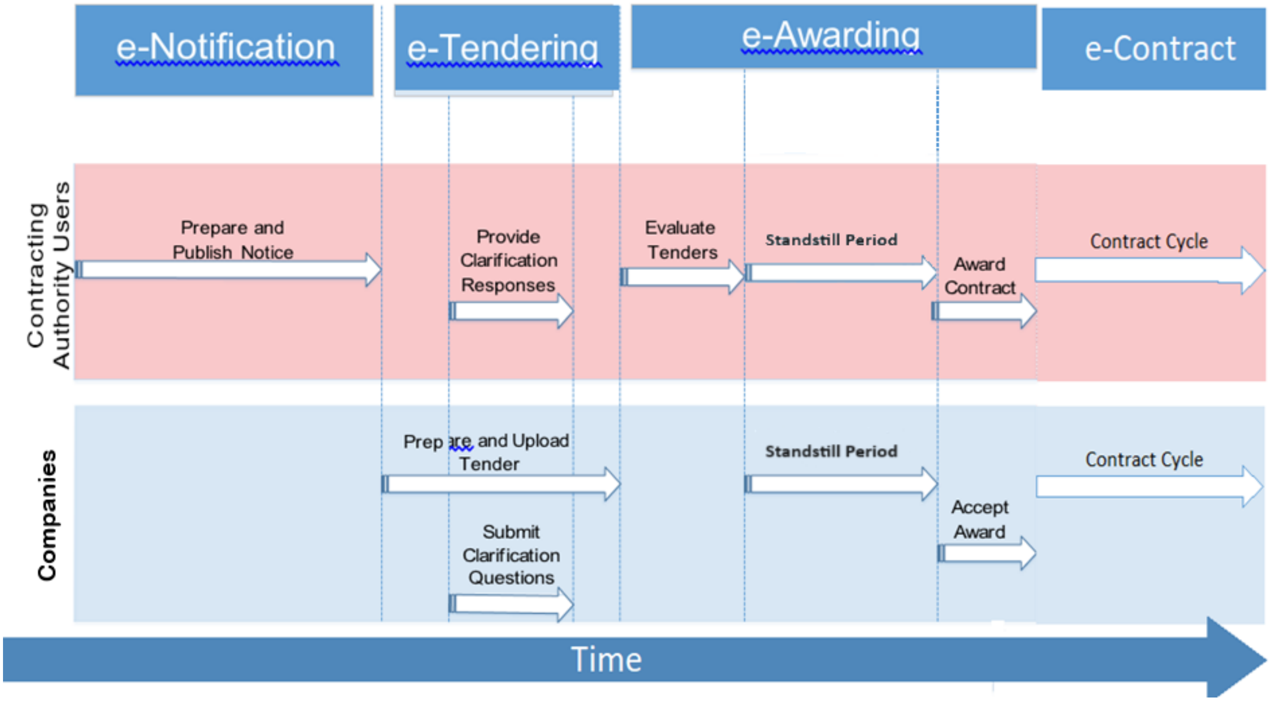


Figure 1 Workflow of Contracting Authority and Economic Users

2 General Functionality

2.1 eTendersNI Main Page

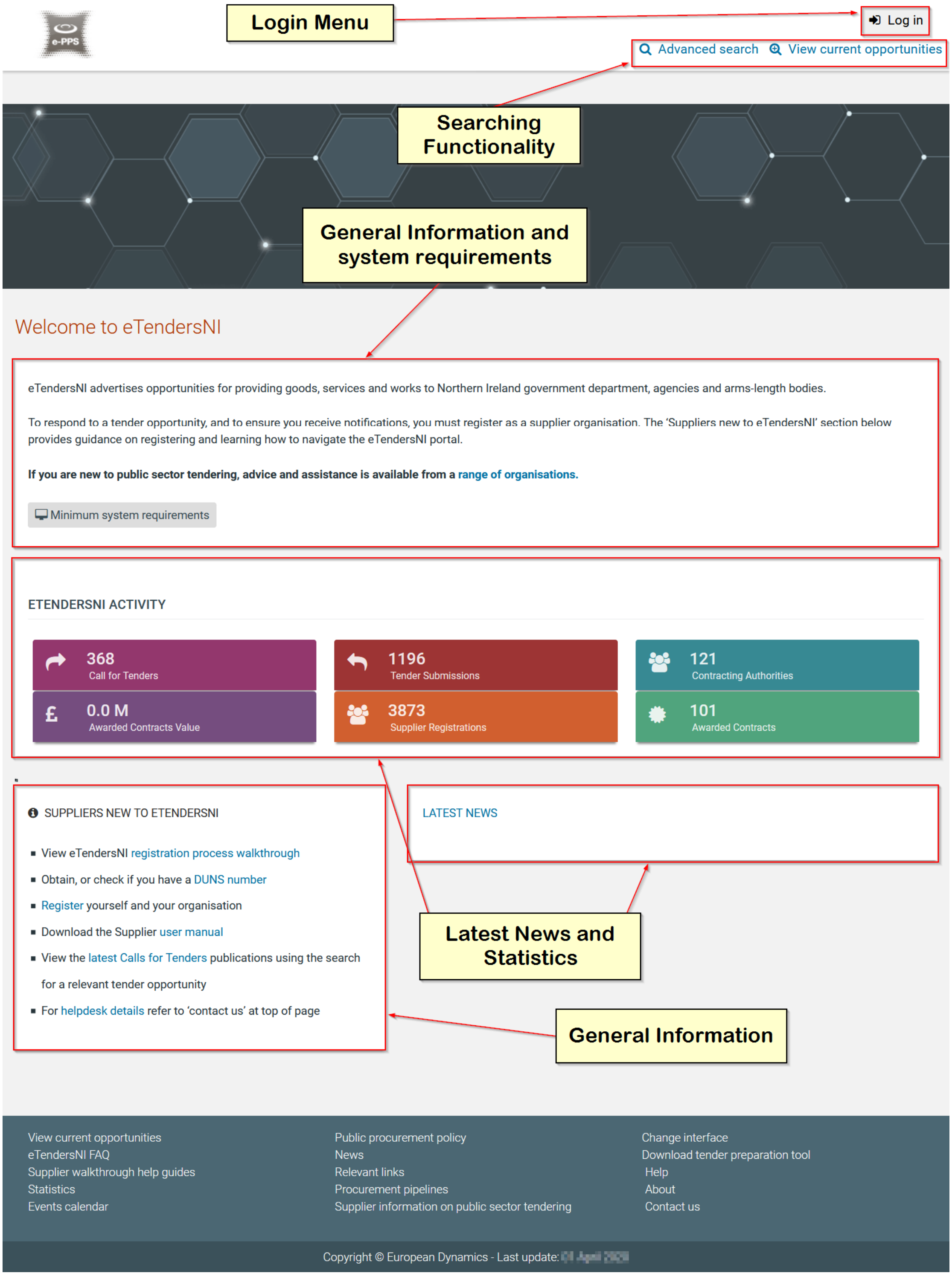


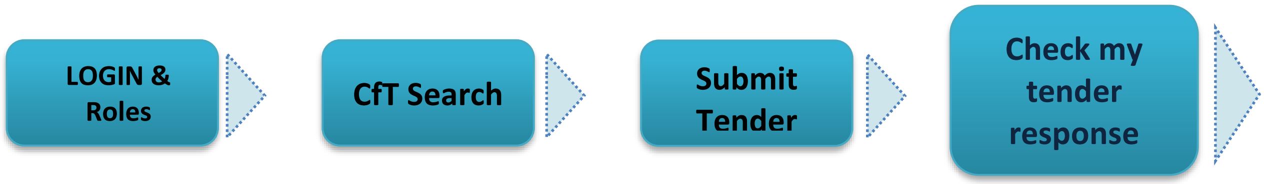
Figure 2 Main eTendersNI page

The main page of the eTendersNI platform contains the functions to allow a user to access all aspects of the platform, such as:

- Top right corner, which contains the Login menu and a part allowing the access to a search functionality.
- Central section, which contains general information regarding the system, such as the functionality for the registration of Economic Operators and contracting authorities, access to the download of the User manuals, etc..
- Bottom Static footer of the main page which provides functionalities accessible from all pages of the eTendersNI platform. This section includes links towards Interactive walkthroughs, Frequently Asked Questions, Latest News, etc.
- Search Functionality: This section allows users to access the search engine in order to retrieve call for tenders, users or organisations information.
- User registration functionality: This section allows the registration of users and organisations
- Walkthrough help guides: This section allows to download guides describing the system functionality.
- eTendersNI activity: provides information on latest tenders published through the system
- Frequently Asked Questions: This section gathers questions already collected about the system and their respective answers.
- Latest News: provides important information about the system.

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

2.1.1 Quick Guide



2.1.2 Login Section

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.

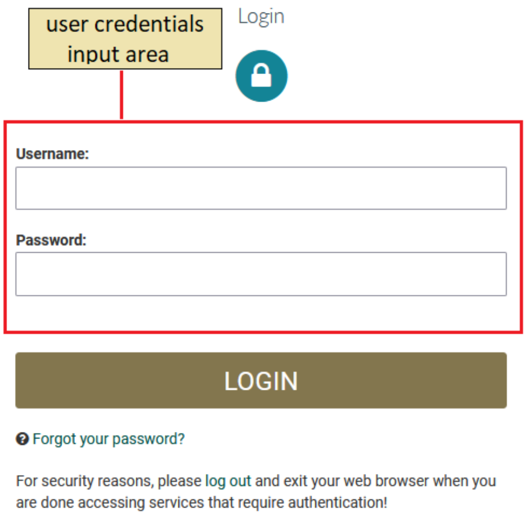


Figure 3 Login panel

2.2 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 headers which helps the user to navigate

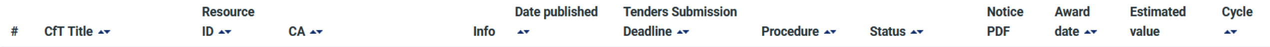
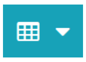
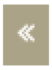
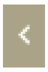


Figure 4 Example of a table headers

- The arrows are used for sorting the results in ascending or descending order according to the field selected. The grid 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:

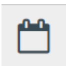
 First Page

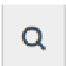
 Last Page

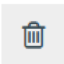
 Previous Page

 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 - 7. Additional Functionality)

 **Clear Button** - Clears the previous selection of the user

2.3 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 user can find the “Show CfT Menu” button in the CfT Workspace, which can be found easily by clicking on the title of the CfT. The “Show CfT Menu” is collapsed by default, as shown in the following figure:

Figure 5 The Show CfT Menu (collapsed)

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

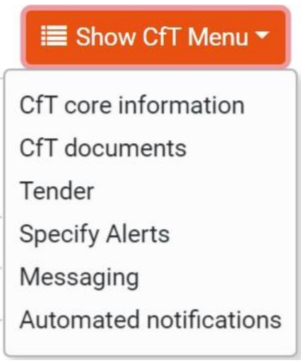


Figure 6 Call for tender menu

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

3 User authentication and organisation management

3.1 Introduction

Return to Quick Guide

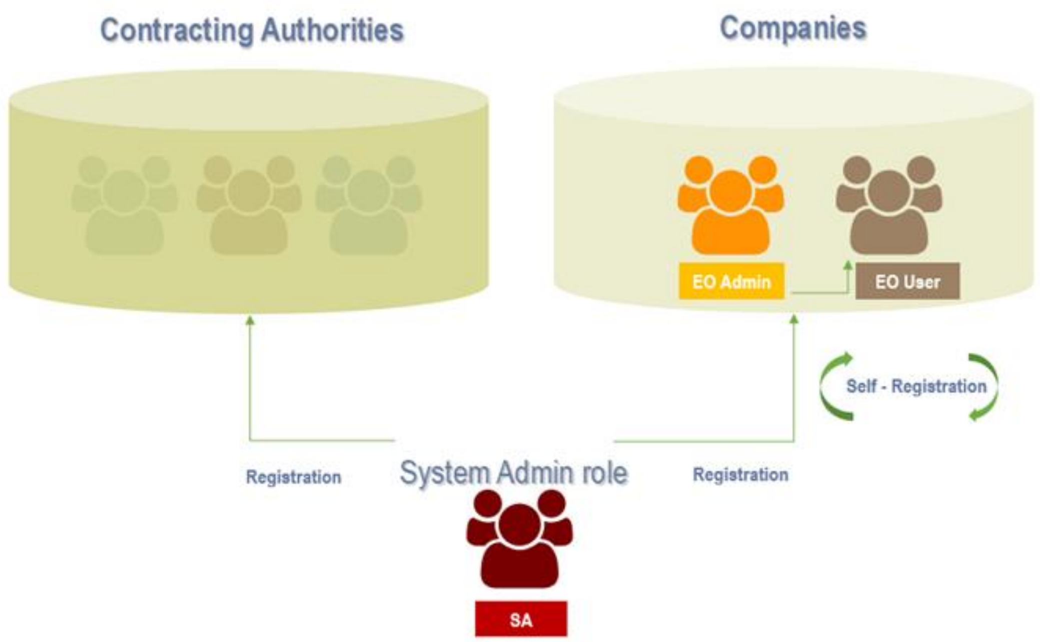


Figure 7 EO Roles supported

EO Admin (Supplier Administrator)

- Edit the organization details
- Add / delete other users
- Complete Supplier Profile Certificates
- Expression of interest / clarifications request
- Prepare and submit tenders
- Accept / Reject contract award
- View Contracts

The Administrator should carry out the registration process, and after this they can add multiple other users.

EO User (Supplier User)

- Expression of interest in a Call for Tender
- Submit a request for clarification and view responses
- Prepare and submit tender response
- Accept / Reject contract awards
- View Contracts

Figure 8 EO Roles - functionality available

3.2 Registration of Economic Operator

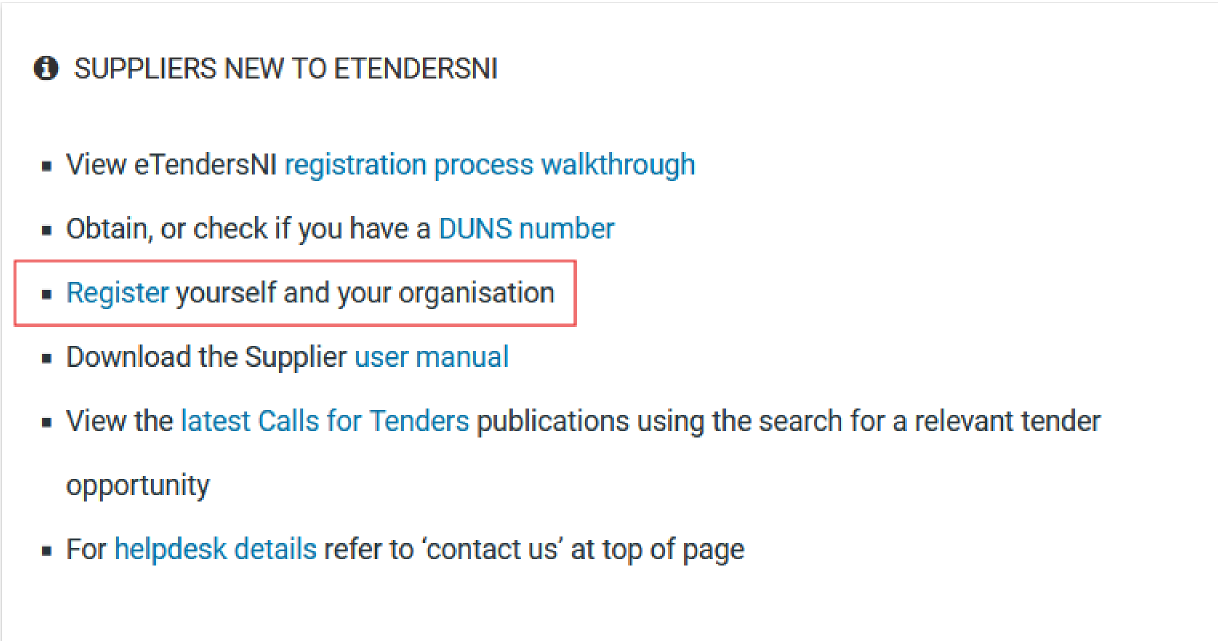
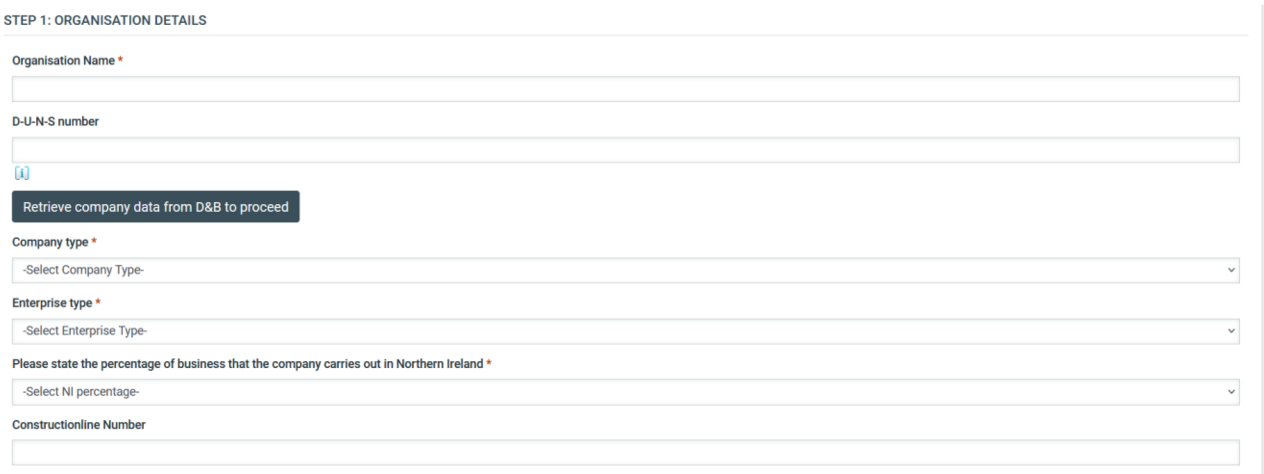


Figure 9 Registration of Economic Operator

The supplier additionally should provide at least all mandatory information and fill in the CAPTCHA element (it will change if you fill the wrong one or refresh the page), and then click on the "**VALIDATE & CONTINUE**" button.



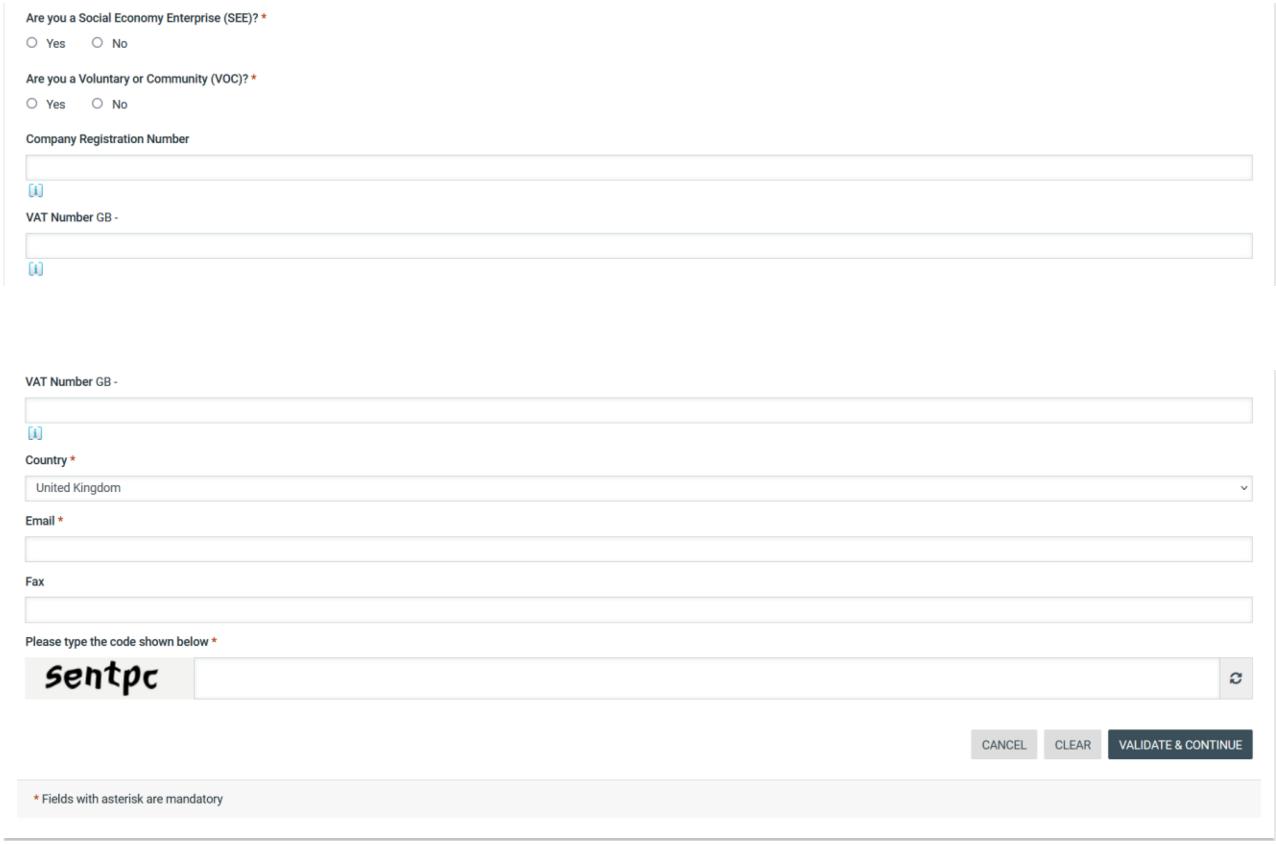


Figure 10 EO Organisation Registration

Only suppliers with a valid DUNS number OR VAT number OR Company Registration Number may register their companies on the system.
For DUNS number you can request one, using this link: https://www.dnb.co.uk/duns-number.html.

In the next step, the supplier must provide the details of the Economic Operator Administrator by providing at least all the mandatory fields. Economic Operator Administrator (EO Admin), are authorised to manage the users and update the details of their organisation, proceed to expression of interest, prepare and submit tenders, accept or reject contract awards and publish subcontracting opportunities.

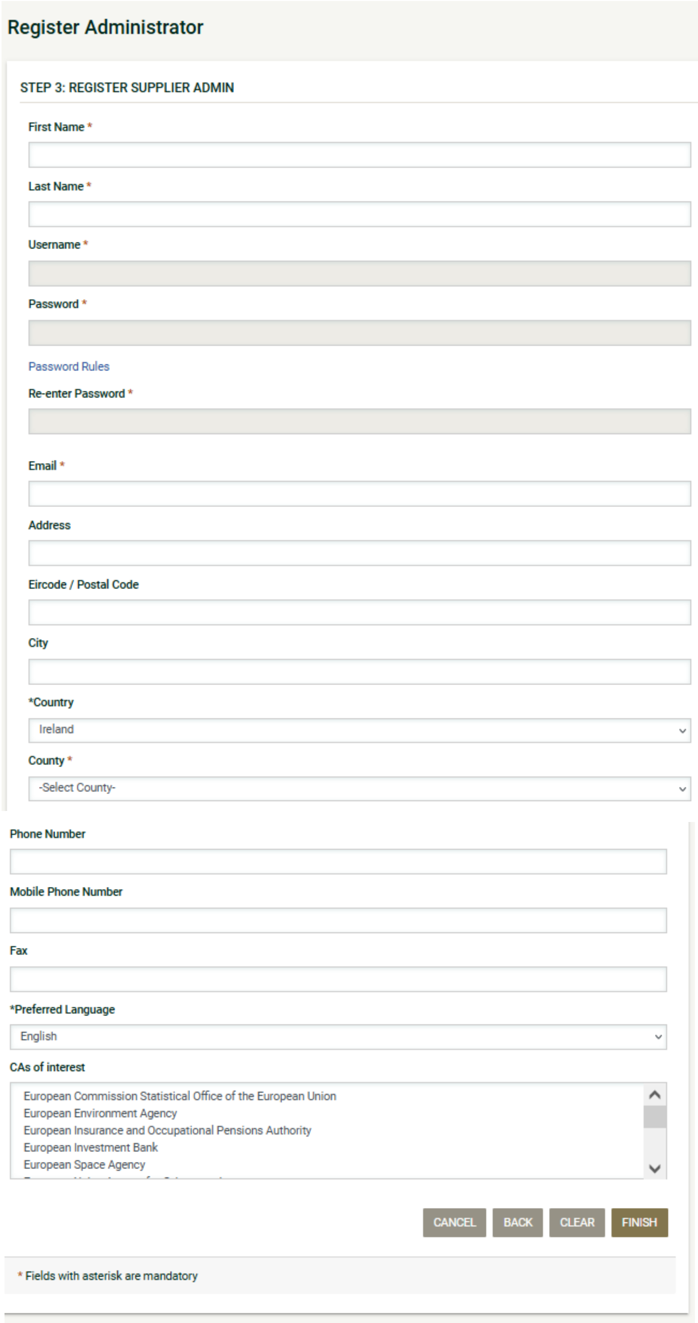
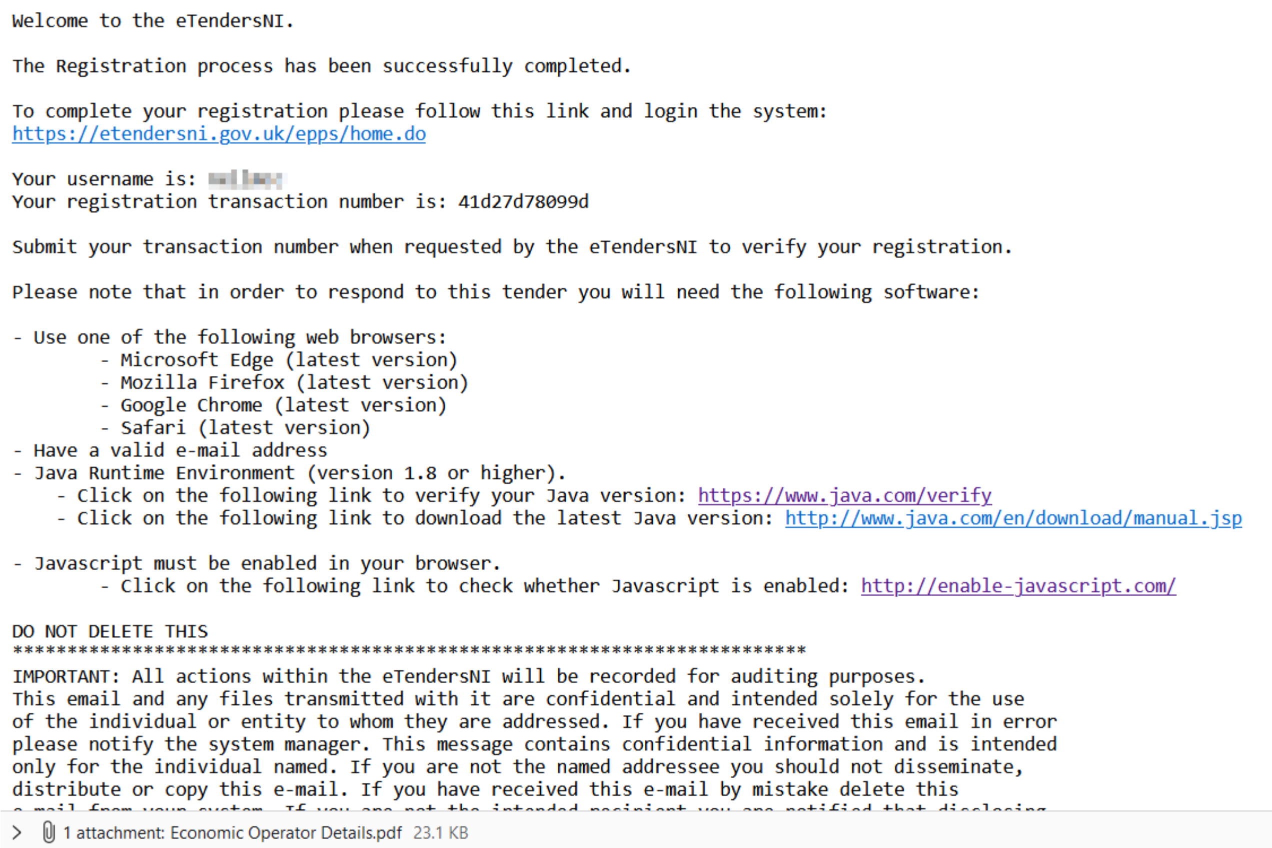


Figure 11 Register Economic Organisation Administrator

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**.

3.3 Logging into the platform for the first time

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



Welcome to the eTendersNI.

The Registration process has been successfully completed.

To complete your registration please follow this link and login the system:
https://etendersni.gov.uk/epps/home.do

Your username is: [redacted]
Your registration transaction number is: 41d27d78099d

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:
  - Microsoft Edge (latest version)
  - Mozilla Firefox (latest version)
  - Google Chrome (latest version)
  - Safari (latest version)
- Have a valid e-mail address
- Java Runtime Environment (version 1.8 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

1 attachment: Economic Operator Details.pdf 23.1 KB

Figure 12 Confirmation email received during registration

1. As part of the initial login phase, once the user has provided their access credentials, they will be requested to input their unique registration transaction number, which they have received separately via email as per the Figure above.

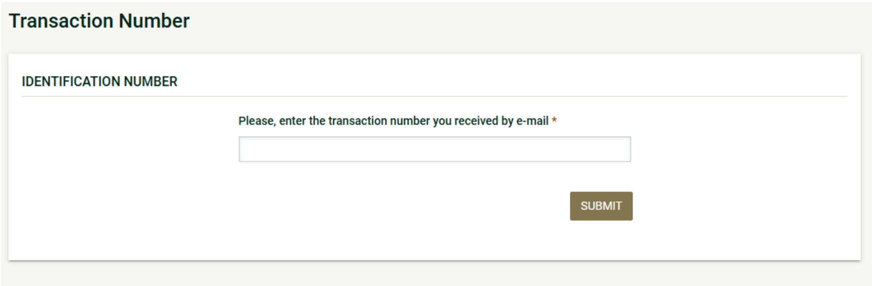


Figure 13 Provision of the transaction number

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

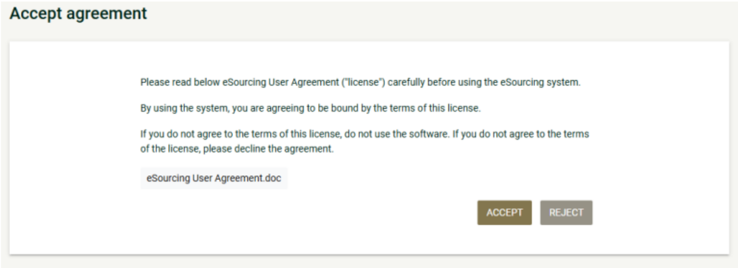


Figure 14 Confirmation of the user agreement

3. Once accepted, the user is prompted to navigate to their homepage

3.4 Password recovery

The user can recover the 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 a username in the following screen.

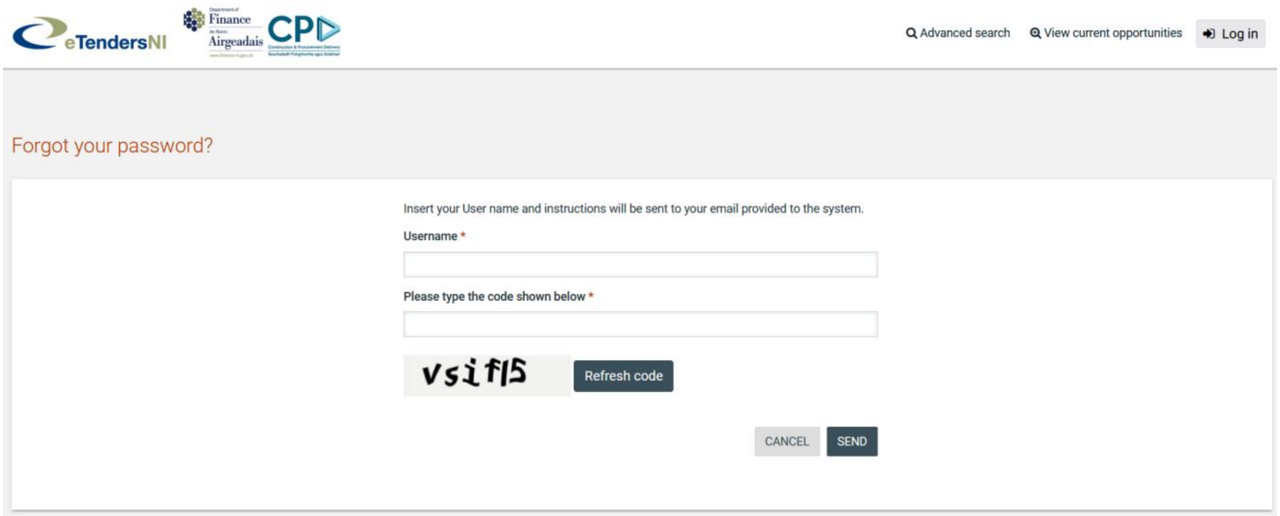


Figure 15 The user inserts his username

If the provided username 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.

```
e-Tendering  Platform - Password reset instructions

New password for user: [redacted], with full name [redacted].

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

You can access the new password section through the following link:
https:/[redacted]

Your registration transaction number is: 5ac7b509e362

***************************************************************************
IMPORTANT: All actions within the e-Tendering  Platform 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 16 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 (this link is available for 1h, so the user has to activate its account as soon as they receive the email, otherwise they have to do the process again in order to receive a new link).

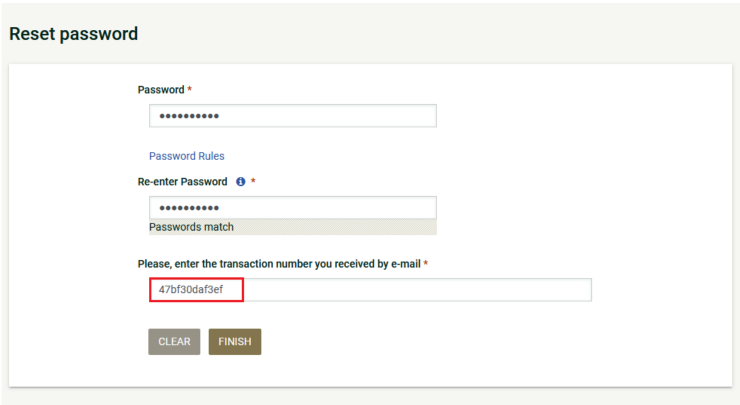


Figure 17 Resetting the password

3.5 Logging into the platform

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

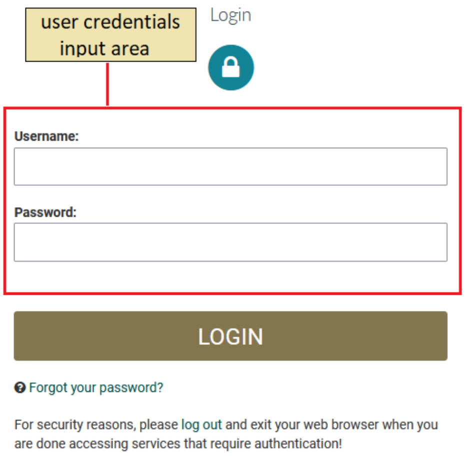


Figure 18 Login module

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

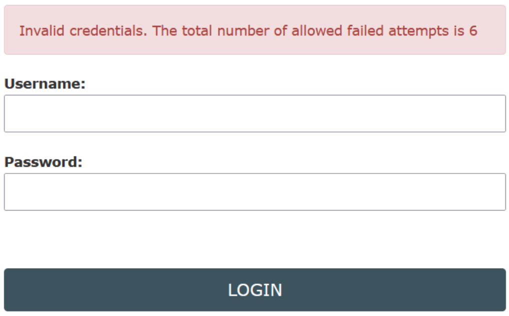


Figure 19 Wrong credentials

If a user provides an incorrect password for a username more than 6 times, the user account will automatically get de-activated. In this case, the user should contact the System Administrator (e.g. contacting the Helpdesk) to re-activate the account.

3.6 Log out from the platform

The user can exit the eTendersNI platform by clicking on the "**Log out**" button.

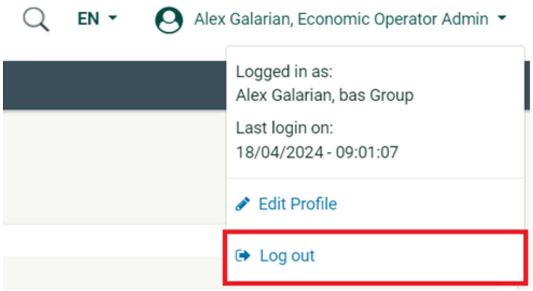


Figure 20 Logout

3.7 Maintenance of user's profile

Once logged in, the user can edit their profile by clicking the down arrow beside their name and platform profile, which produces the screen below in Figure 19. Click "Edit Profile" to navigate to the "Edit User" page where the user's information can be updated.

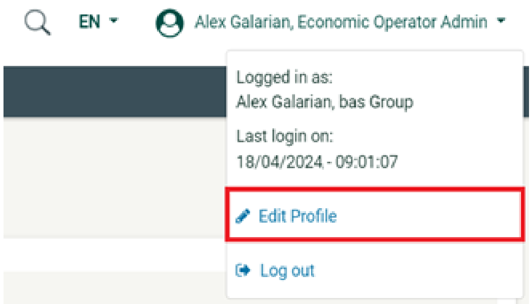


Figure 21 Edit profile option

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 login, in order for them to provide a new password. In case the user does not provide a new password, they will not be able to have full access to the eTendersNI platform, e.g. access to "View Tenders" page.

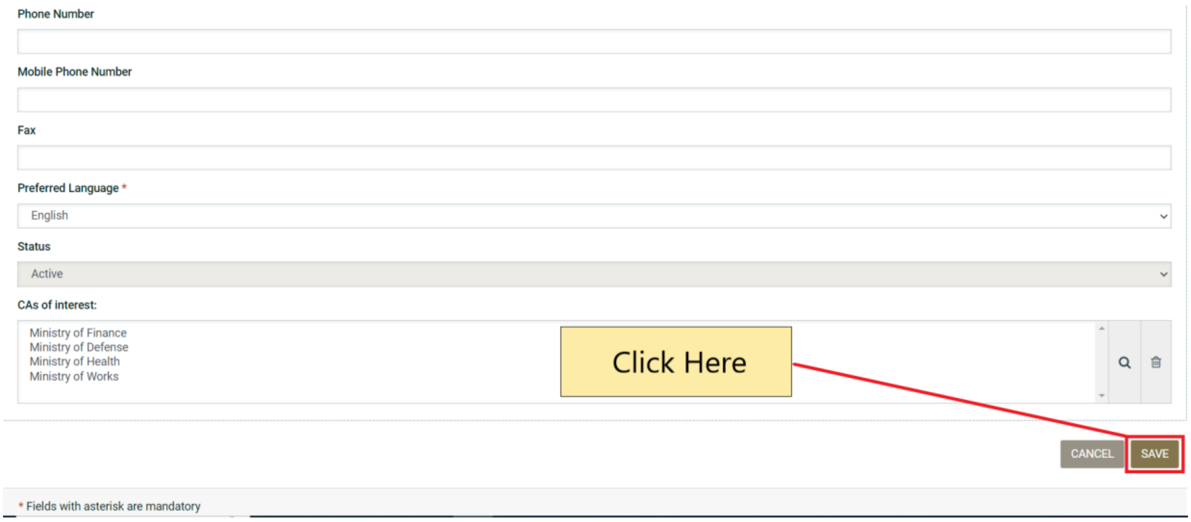


Figure 22 Edit user's details

3.7.1 Password rules

When the user decides to amend its password, they can click the "edit profile" button (Figure 22 Edit user's details) and write a new password to the password field, otherwise the user can leave the password field empty as it's no mandatory field. The password should follow a specific configuration. To view the password rules the user should click on the "**Password Rules**" link.

Figure 23 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

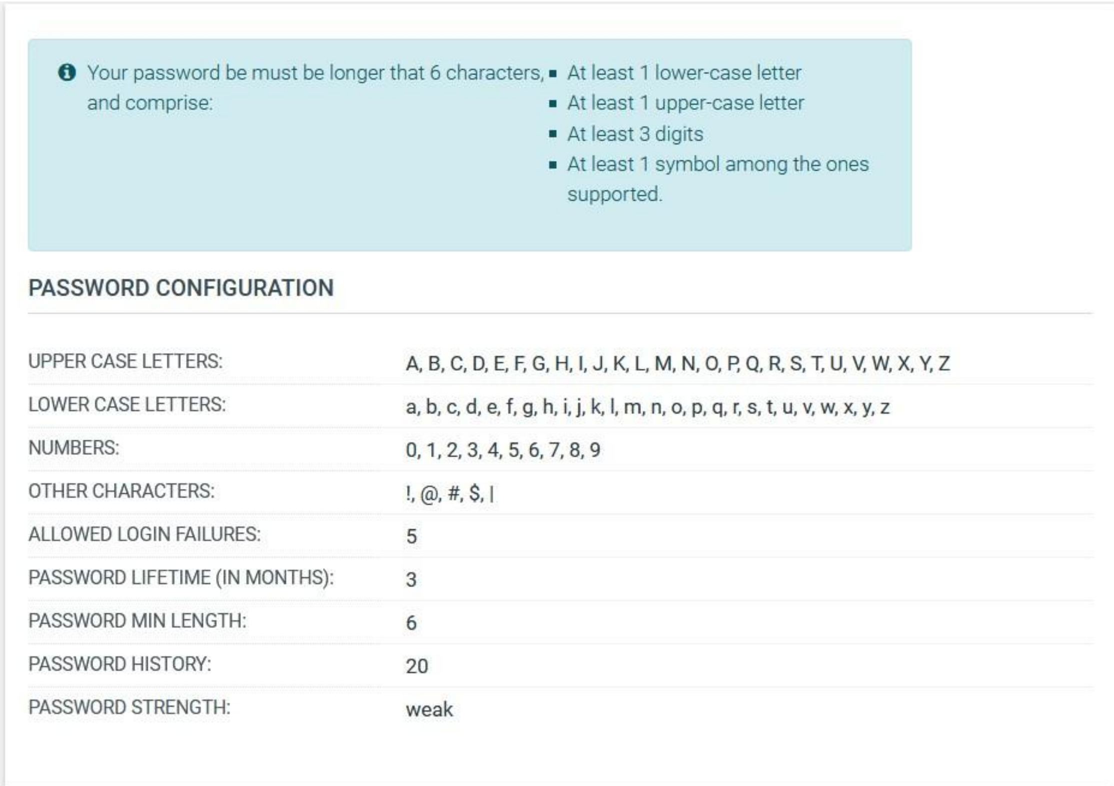


Figure 24 Password configuration rules

In case the password does not follow the above password rules then the following message appears.

Figure 25 Change password error message

In case the password contains part of the username (if the username is "annabrown" then the password should not contain "an" or "na" or "br" or any 2 sequential characters that appear on the username) then the following message appears for security reasons.

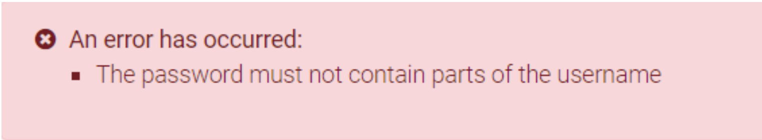


Figure 26 Change password error message 2

3.8 CfT Management

Figure 27 CfT Management position

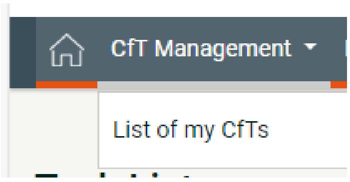


Figure 28 CfT Management Menu

The "List of my CfTs" contains all the CfTs that the user is associated with. For example the CfTs that they expressed an interest or the CfTs where they did a tender submission. Also, if another user of the company associates all user accounts (and yours) when they express an interest or when they do their tender submission, you will have these CfTs under the "list of my CfTs".

3.9 Organisation management

Figure 29 EO Administration position

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

By clicking on the ''**EO Administration**'' a dropdown menu will be displayed and then by selecting the ''**EO Management**'' option, this management functionality is provided.

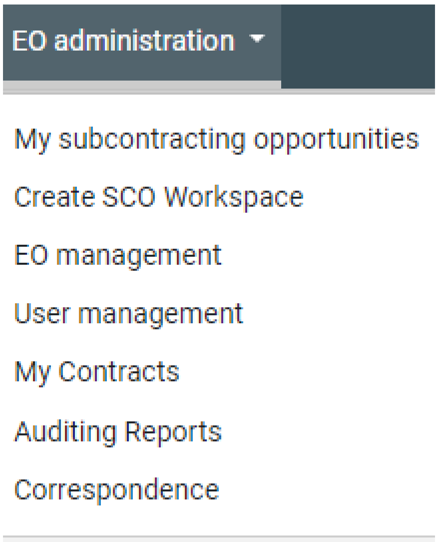


Figure 30 EO Administration Menu

The system displays the organisation details in “Read only” format.

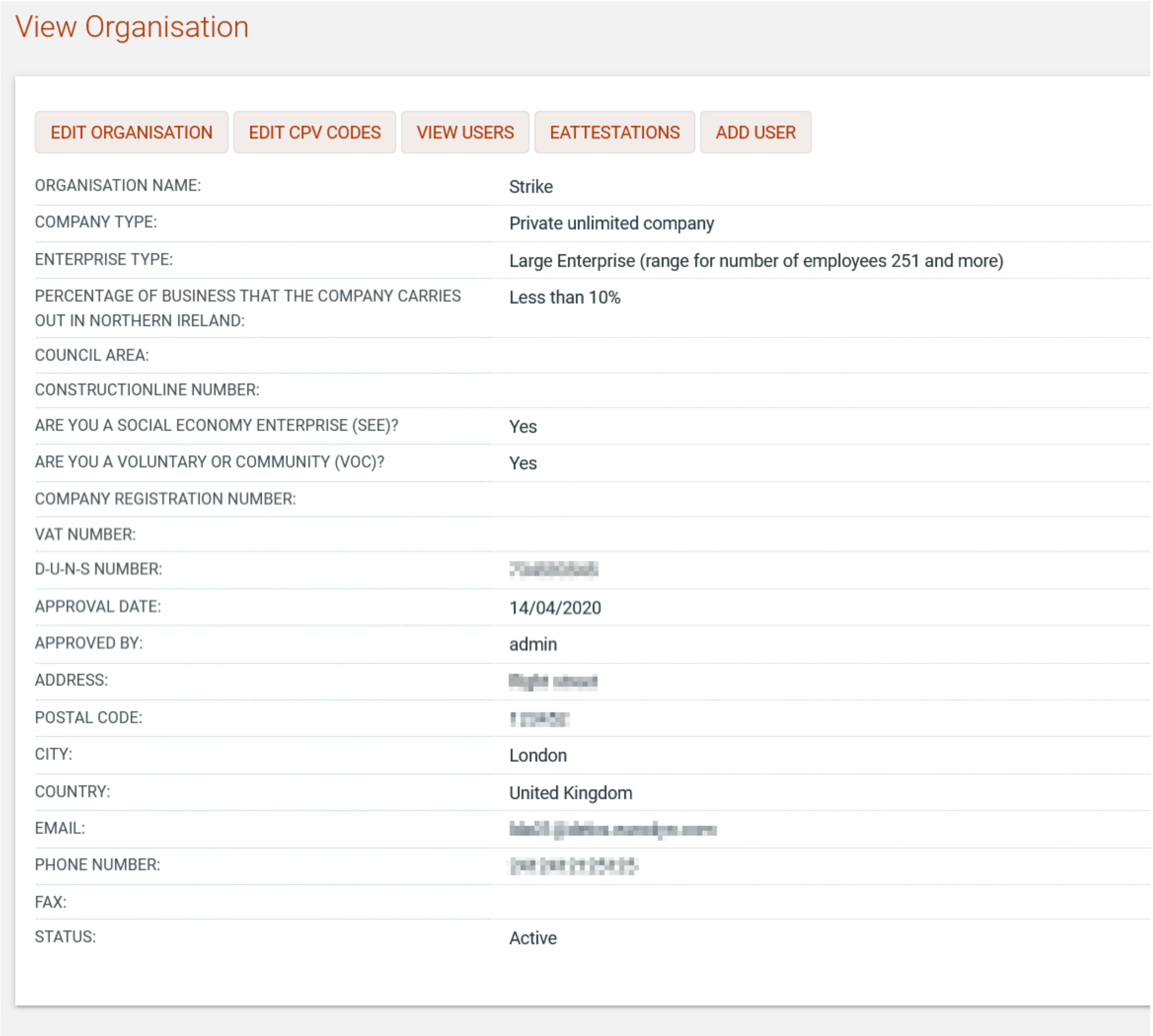


Figure 31 EO Management page

Please note that the Economic Operator **User role** does not have access to the above functionality. For example, the Economic Operator User cannot edit the organisation’s information and they cannot add new user.

3.9.1 Edit organisation details

Selecting the option "**EDIT ORGANISATION**" allows the user to edit the organisation's details

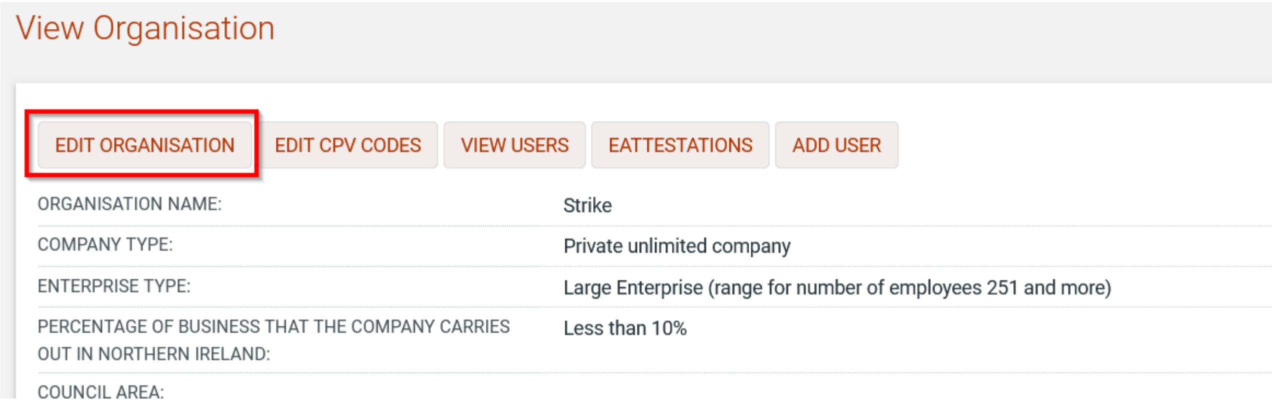


Figure 32 Edit organisation button

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

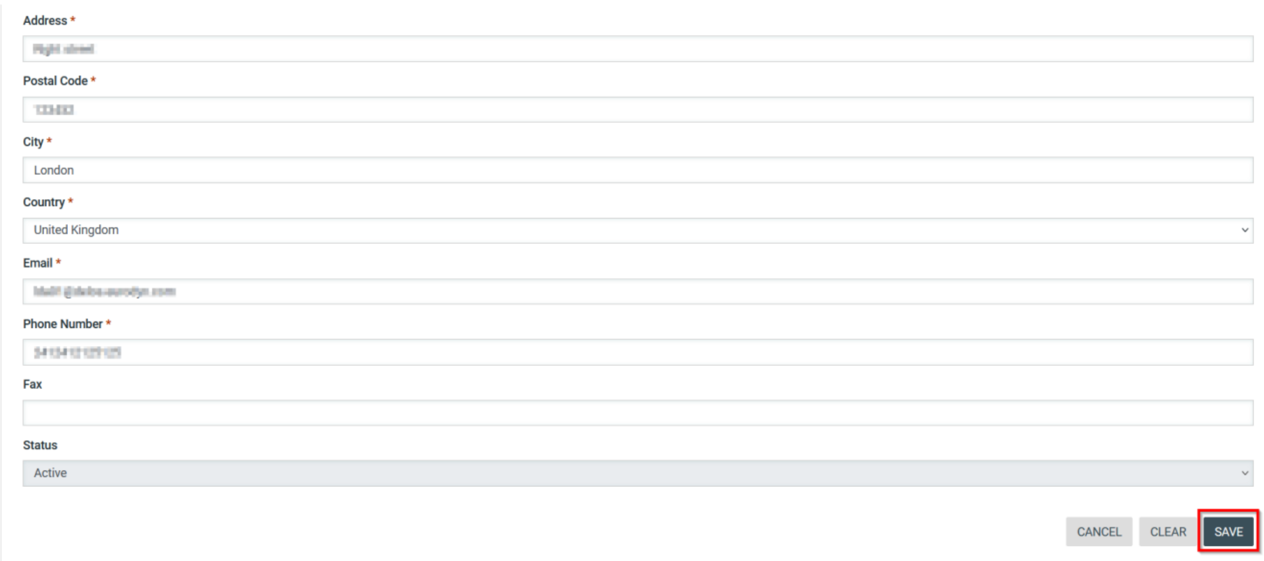


Figure 33 Save organisation modification

3.9.2 Editing CPV codes of interest

In order to set-up or edit the CPV codes associated with the Economic Operator the EO Admin clicks on the “**EDIT CPV CODES**” option in EO Organisation management page. This page can be accessed viewing the EO Administration dropdown by selecting EO Management.
When the organisation administrator sets-up their CPV codes of interest, only **EO admins** will receive one overnight email with the list all the Competitions published under a CPV code that they have an interest of. There is an additional alert functionality which is available both for users and admins and it is the CAs of interest. 3.9.5.1

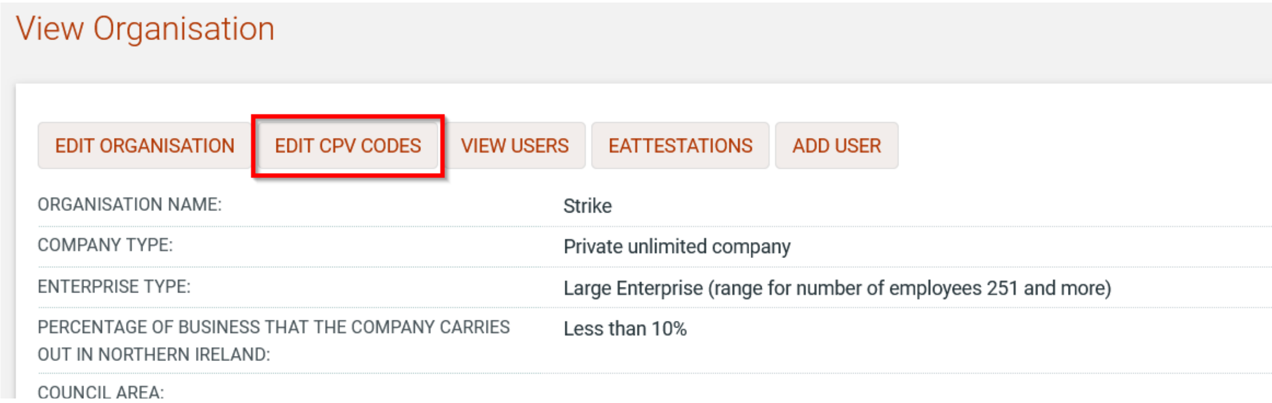


Figure 36 Edit CPV codes (For agreement)

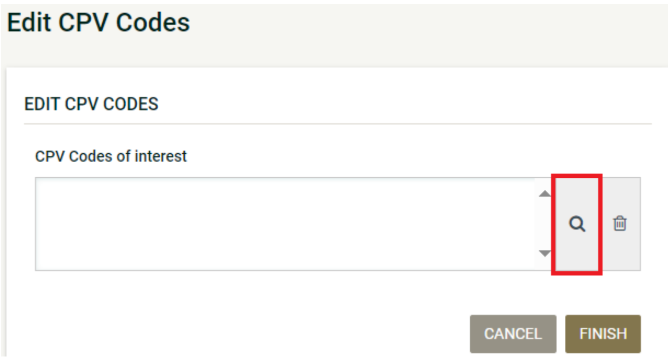


Figure 34 Edit CPV codes

After clicking the magnifying glass, the system displays the CPV codes which are currently associated with the Economic Operator:

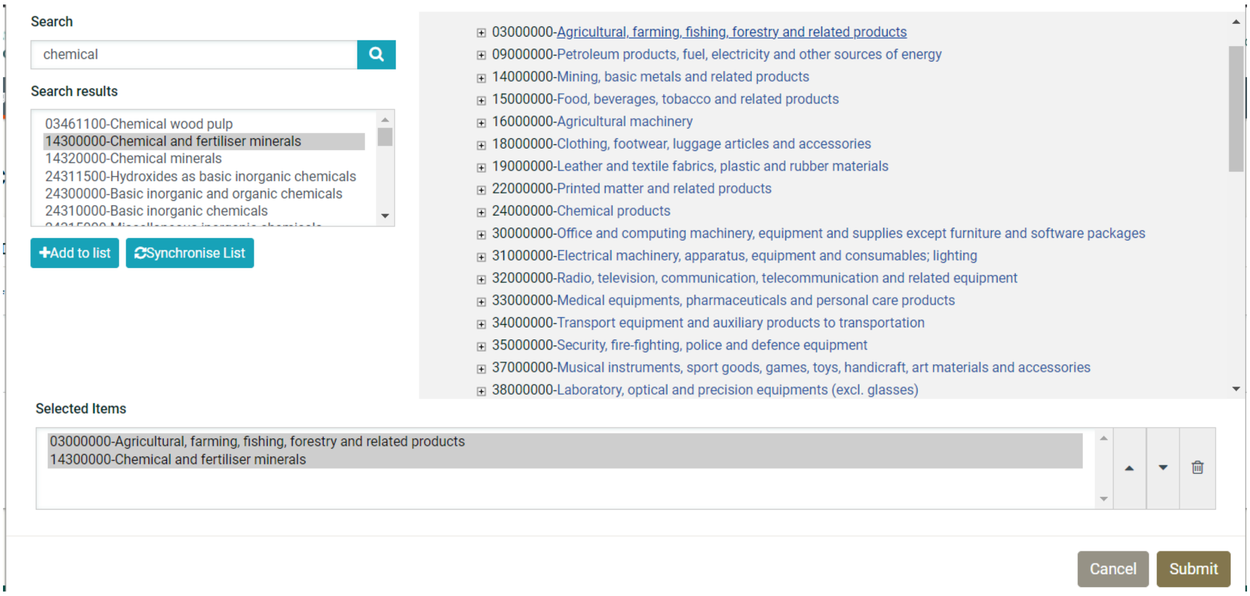


Figure 35 Accessing the CPV codes functionality

The EO Admin 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 7.1 View Contracts

After the Economic Operator has accepted the contract, a new contract workspace is created in the system and the user can access it by clicking on the main menu, on tab "**EO administration**" tab and selecting the "**My Contracts**" label in the dropdown options.

Figure 145: Access "My Contracts"

Alternatively, the contract can be accessed by clicking "**advanced search**" button and selecting **Contracts** and filling some of the respective search fields in order to retrieve the contract record of interest.

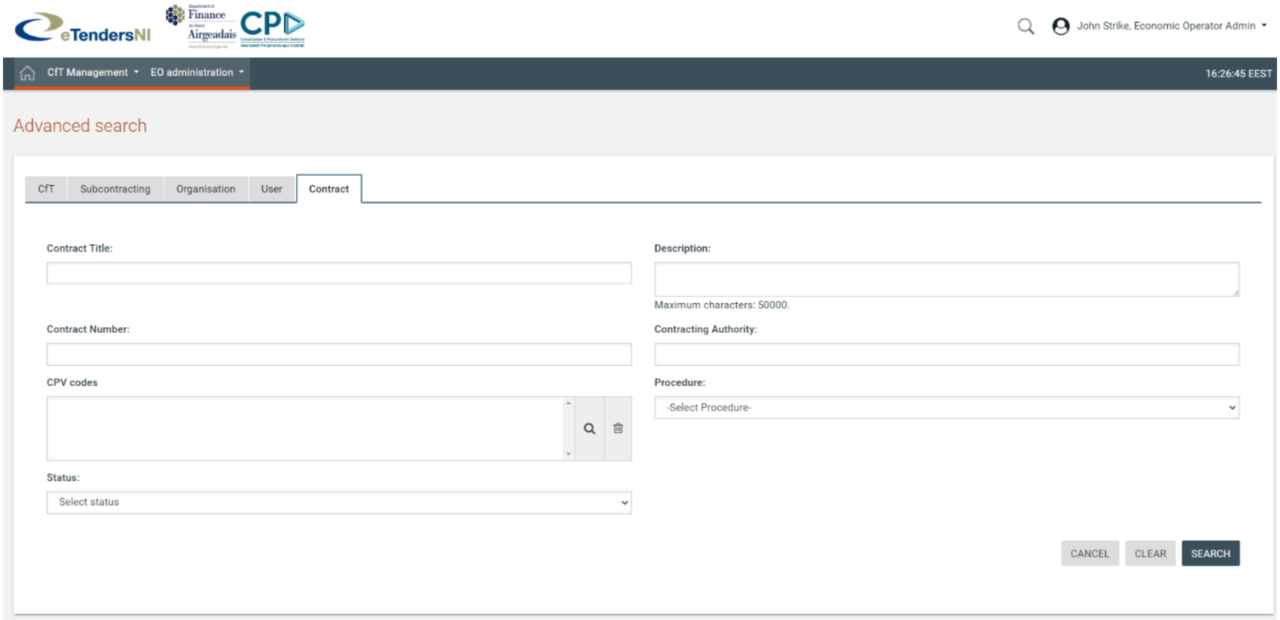


Figure 146: Advanced Search for “Contracts”

The user can access the list of all contracts under their organisation (for which they are granted access) and view the details of every contract. The user is able to see the “**Contract Title**”, the “**Contract Number**” that the system has provided, the “**Contract Expiry date**”, and the “**Contract Value**” which displays the contract value agreed between the Economic Operator and the Contracting Authority. Finally, the user can access a specific contract document by clicking on the contract title displayed in the following figure.

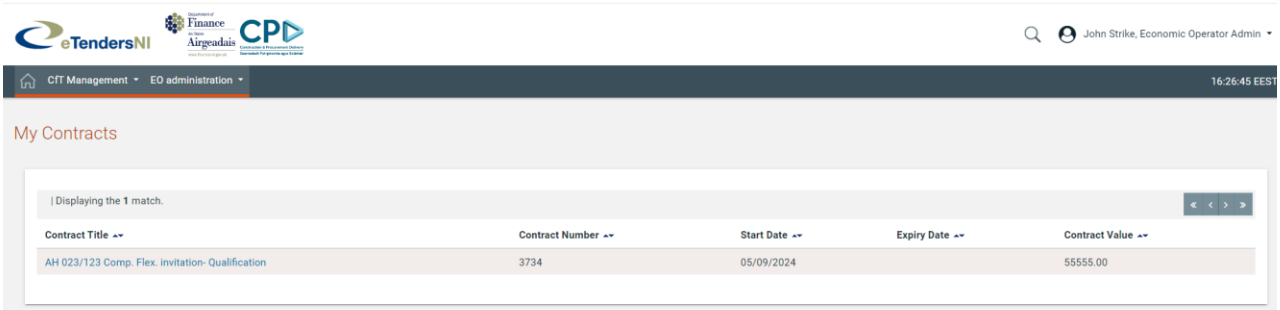


Figure 147: My Contracts List

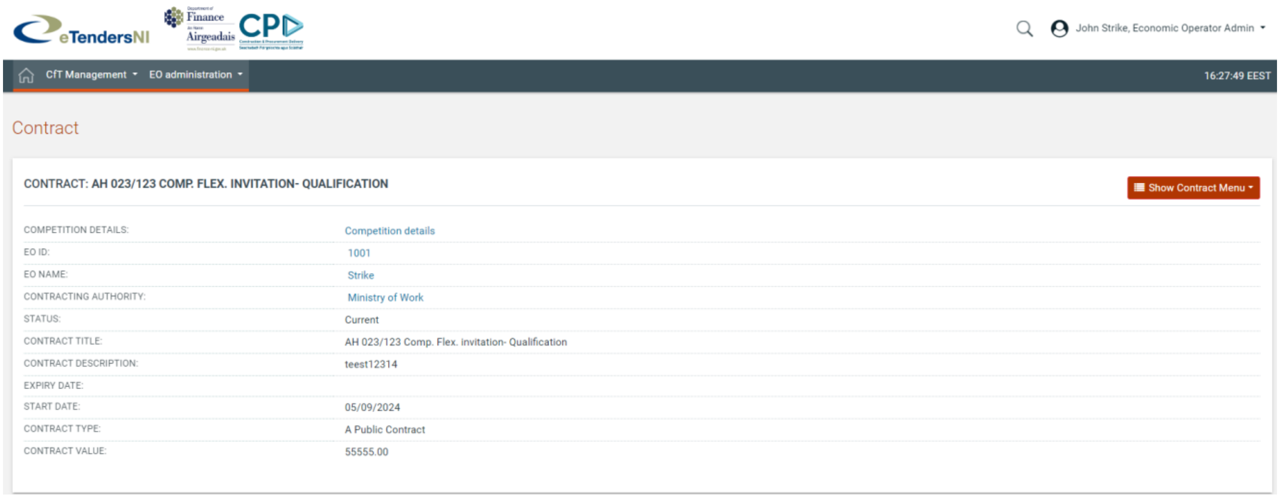


Figure 148: Contract Main page

3.10 Contract Documents

From the main page of the Contract, the user can also access the Contract documents (if any) from the contract menu button on top right corner. This allows the user to download any contract documents for the contracts that the user has access to.

Figure 149: Contract Menu functionality

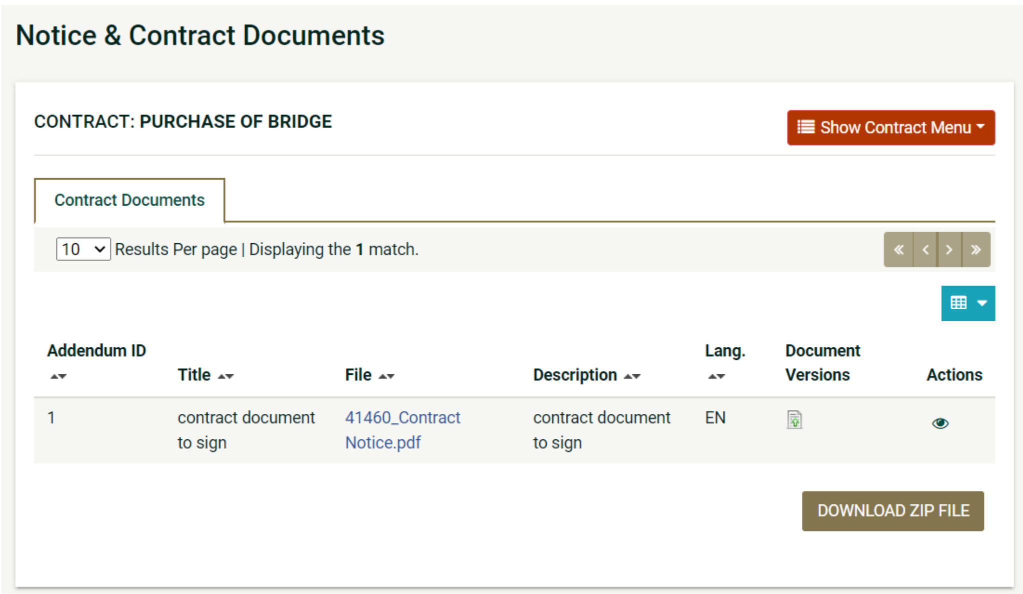


Figure 150: Contract Documents

The user accesses the contract documents, uploaded from contracting authority where the following information columns are displayed:

- Addendum ID: the documents identifier given by the system (starts from 1 on each document).
- Title: the name of the document.
- File: the name of the uploaded file.
- Description: description of the document provided from Contraction Authority.
- Lang: notice of the language of the document.

The user can download all the existed documents with their attachments from the list, by clicking the “DOWNLOAD ZIP FILE” button in the bottom right corner.

Inserting Common Procurement Vocabulary Codes (CPV)).

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

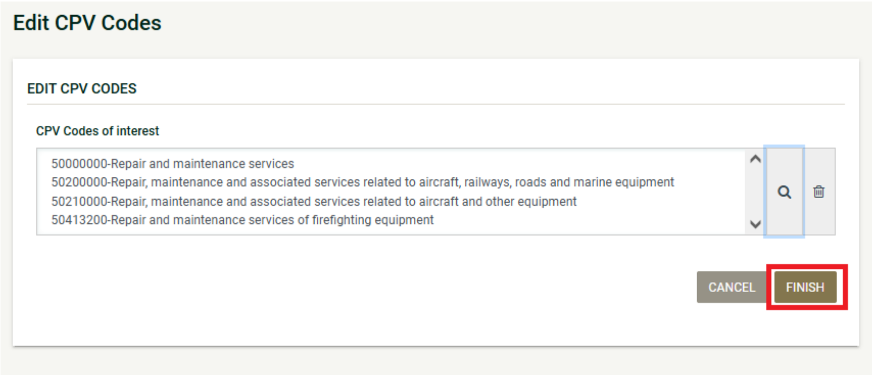


Figure 36 Edit CPV codes

<u>This selection then allows to receive automated alerts on the exact CPV codes matching your above selection.</u>
<u>The purpose of selecting CPV codes is to allow companies to receive automated email notifications each time a new publication of a CfT is made on CPV matching the CPV codes selected by the company in their profile. This thus allows companies to automatically be notified on new tender opportunities.</u>

3.10.1 Viewing users registered in the organisation

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

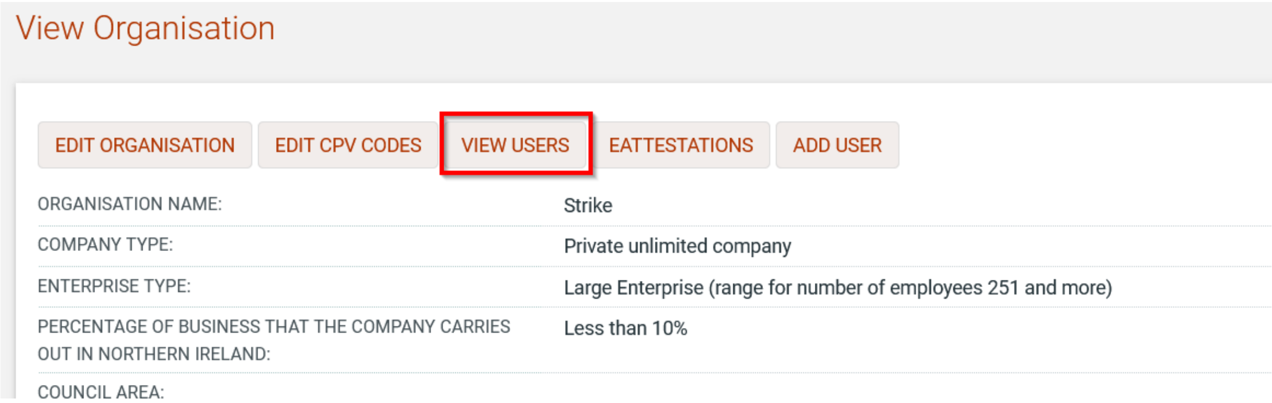


Figure 37 View users

The system displays all the registered users within the organisation.

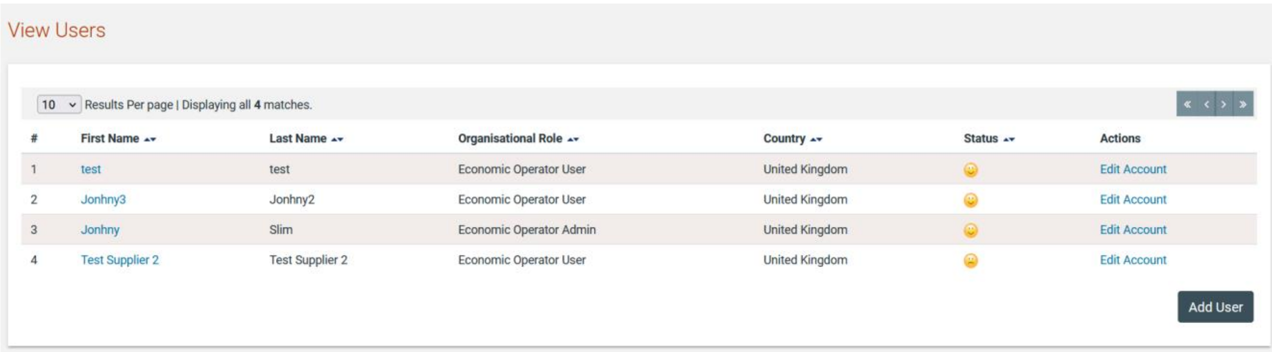
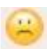


Figure 38 Display of users registered under the Economic Operator

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

 Active

 Inactive

 Deactivated

De-activate a user: The EO Admin account owner can edit the user accounts and deactivate the accounts of the old users that do not need to use the system anymore. The EO admin can deactivate the accounts by adding a past date or today's date in the "Valid to" field and hit "Save" then the account status will update to "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, proceed to expression of interest, prepare and submit tenders, accept or reject contract awards and publish subcontracting opportunities.
- Economic Operator users (**EO Users**). Users with this type of role are authorised to proceed to expression of interest, prepare and submit tender returns and accept or reject contract awards.

3.10.2 Add new user to the organisation

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

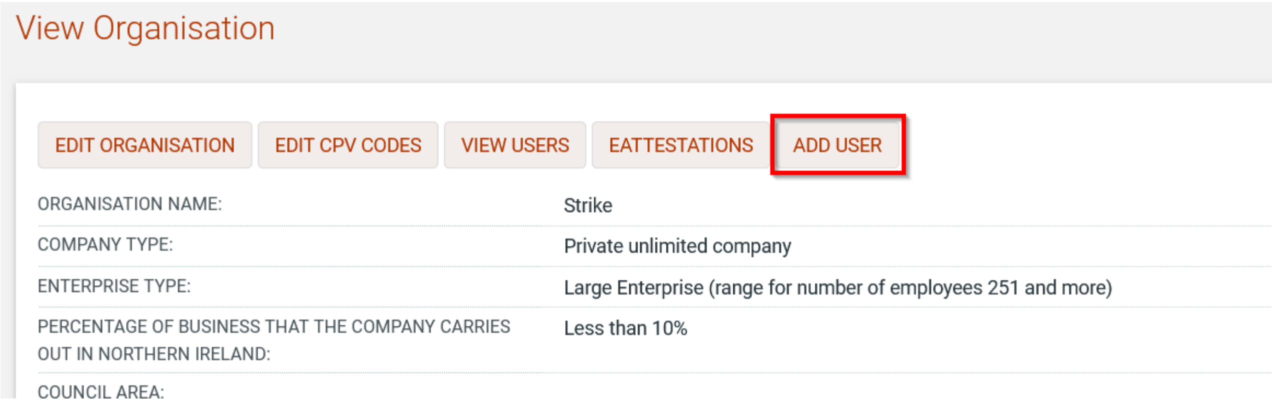


Figure 39 Add user button

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

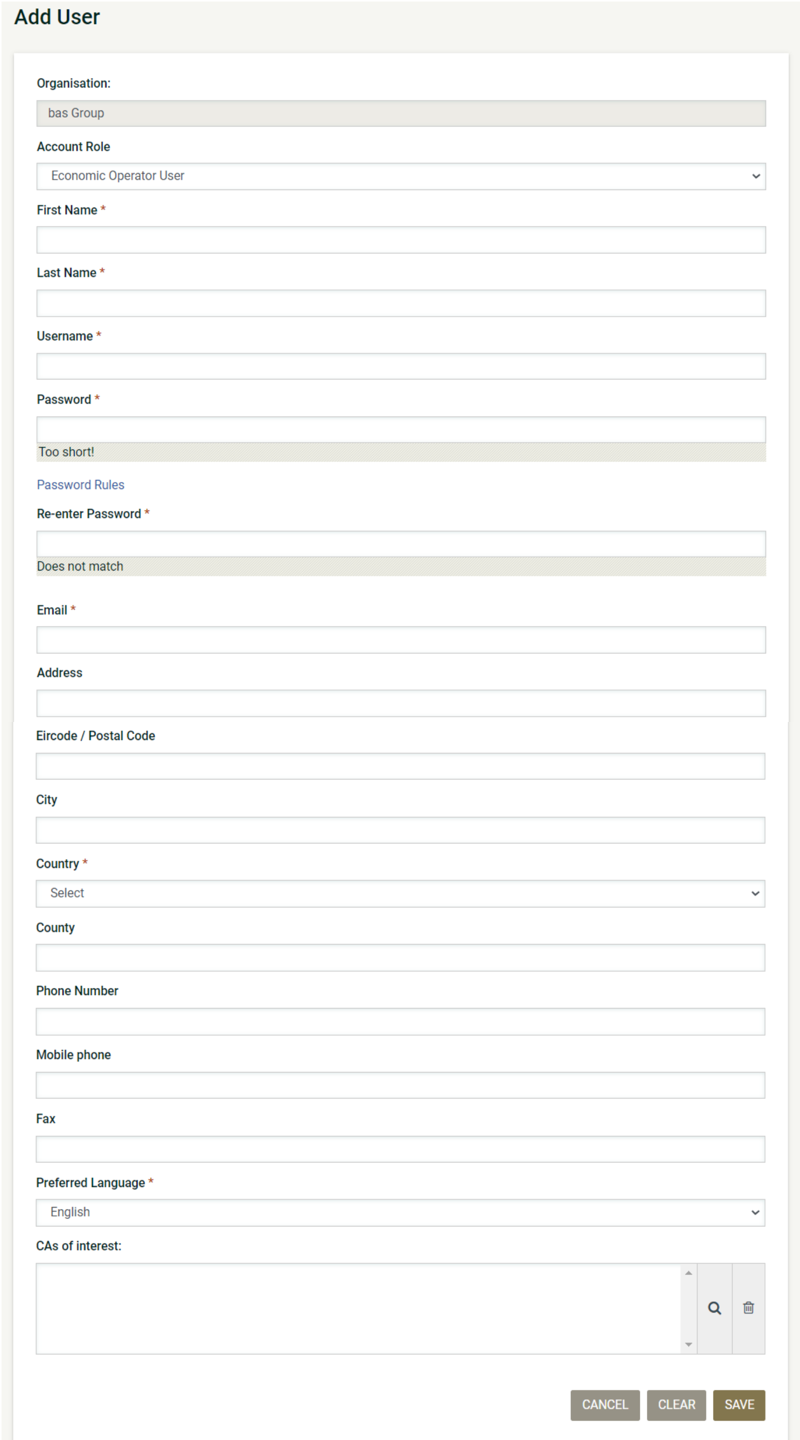
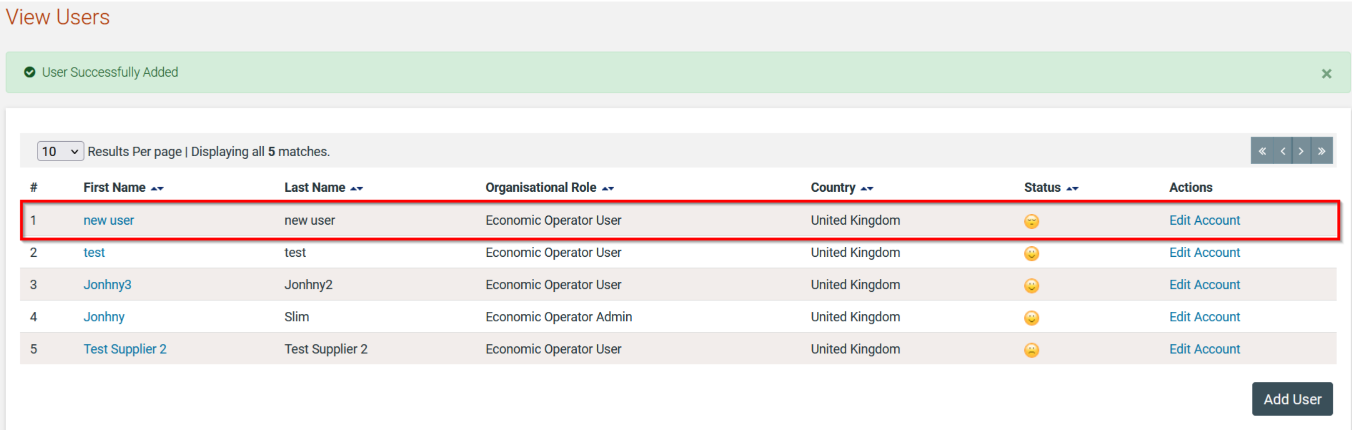


Figure 40 Add a new user in the organisation

Initially, the account of the new user will be Inactive.



View Users

User Successfully Added

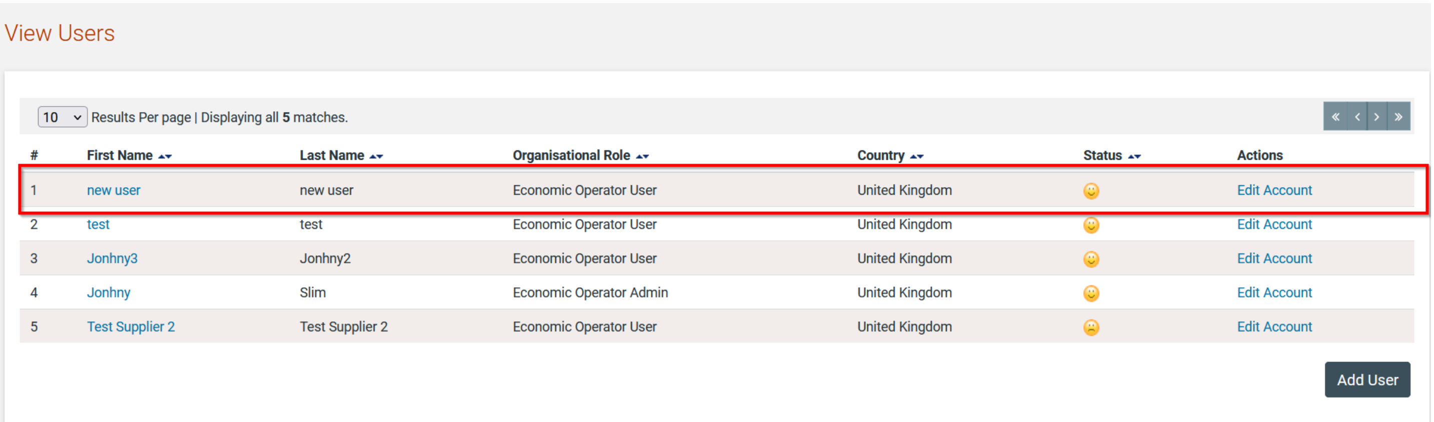
10 Results Per page | Displaying all 5 matches.

#	First Name	Last Name	Organisational Role	Country	Status	Actions
1	new user	new user	Economic Operator User	United Kingdom		Edit Account
2	test	test	Economic Operator User	United Kingdom		Edit Account
3	Jonhny3	Jonhny2	Economic Operator User	United Kingdom		Edit Account
4	Jonhny	Slim	Economic Operator Admin	United Kingdom		Edit Account
5	Test Supplier 2	Test Supplier 2	Economic Operator User	United Kingdom		Edit Account

Add User

Figure 41 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, as noted previously in Figure 12 Confirmation email received during registration. In order to activate their account, the user must provide this number during their first login. Thereafter, the status of the account will be active.



View Users

10 Results Per page | Displaying all 5 matches.

#	First Name	Last Name	Organisational Role	Country	Status	Actions
1	new user	new user	Economic Operator User	United Kingdom		Edit Account
2	test	test	Economic Operator User	United Kingdom		Edit Account
3	Jonhny3	Jonhny2	Economic Operator User	United Kingdom		Edit Account
4	Jonhny	Slim	Economic Operator Admin	United Kingdom		Edit Account
5	Test Supplier 2	Test Supplier 2	Economic Operator User	United Kingdom		Edit Account

Add User

Figure 42 The account of the new added user is activated

3.10.3 Editing User Details

The EO Admin 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:

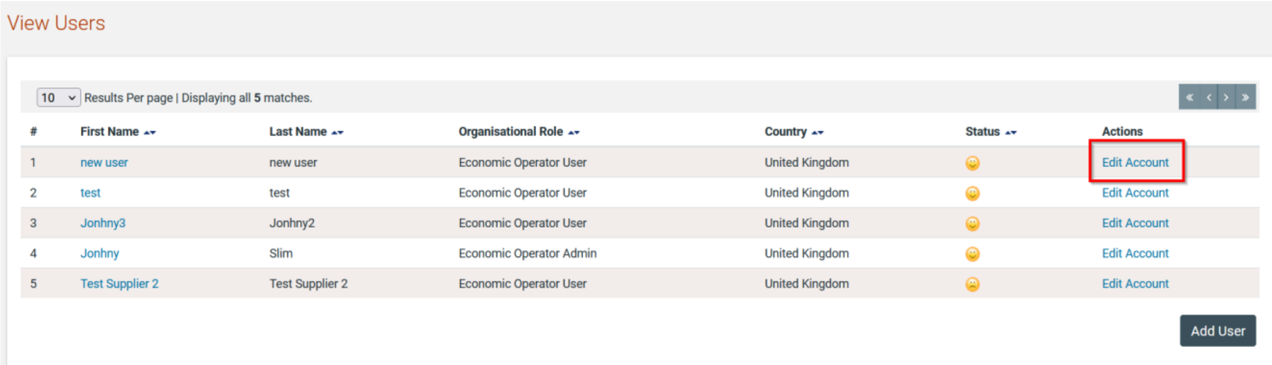


Figure 43 Edit account link

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

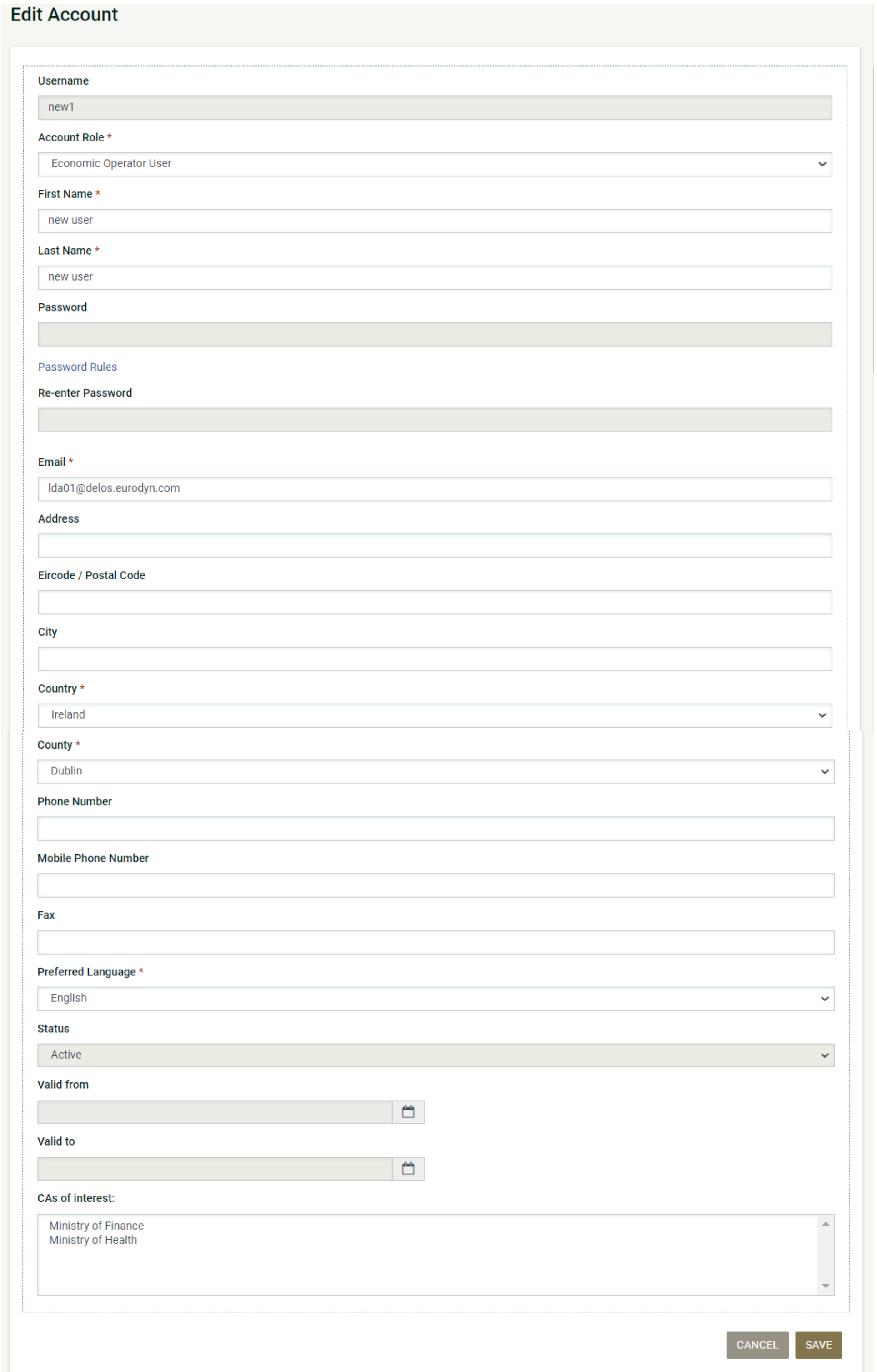


Figure 44 Editing user details

3.10.3.1 CAs of Interest

“CAs of interest” is an additional alert functionality, available to all (EO users and EO Admins) using the CAs of interest in the user profile. Each user can select one or more Contracting Authorities and receive email notifications when the selected CAs publish any competition. The users can find this functionality by clicking “edit profile”. On the last field they can find the “CAs of Interest” field.

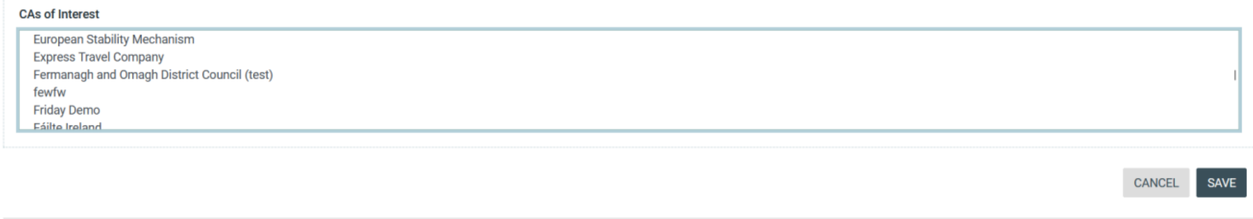


Figure 45 CAs of Interest

The user can select one or more organisations with Ctrl + Left mouse click or single mouse click for only 1 selection.

After selecting the Contracting Authorities of their interest, they can click the “SAVE” button.

3.10.4 eAttestation functionality (Certificates)

eAttestation allows supplier to fill in some questionnaire (construction certificates, company data, etc.) that are very often used in tender questionnaire, as part of their company profile. In this manner companies fill in the questionnaire only once, and then can re-use it for as many tenders as needed. The questionnaires that are available for companies to fill in, are visible upon clicking on the "eAttestation" button (from the EO organisation management page). Companies do not need to necessarily fill in all the questionnaires that are available under this "eAttestation" section, they can simply fill in the ones that are frequently requested under the call for tender that they bid for.

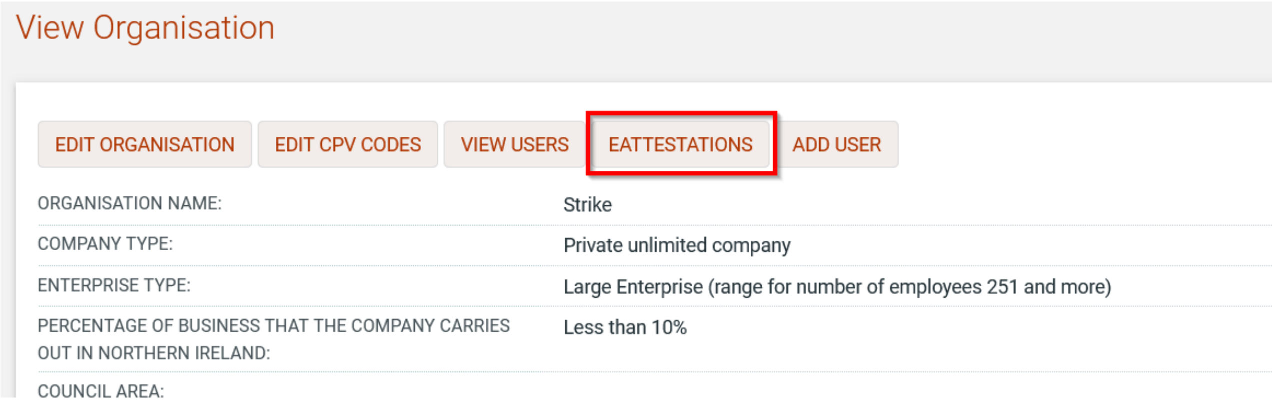


Figure 46 eAttestation functionality

Figure 47: No Certificate assigned

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

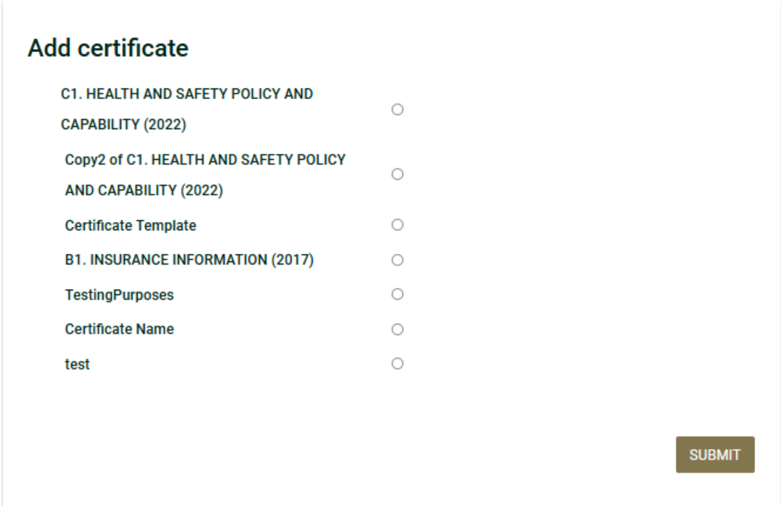


Figure 48: Add Certificate

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.

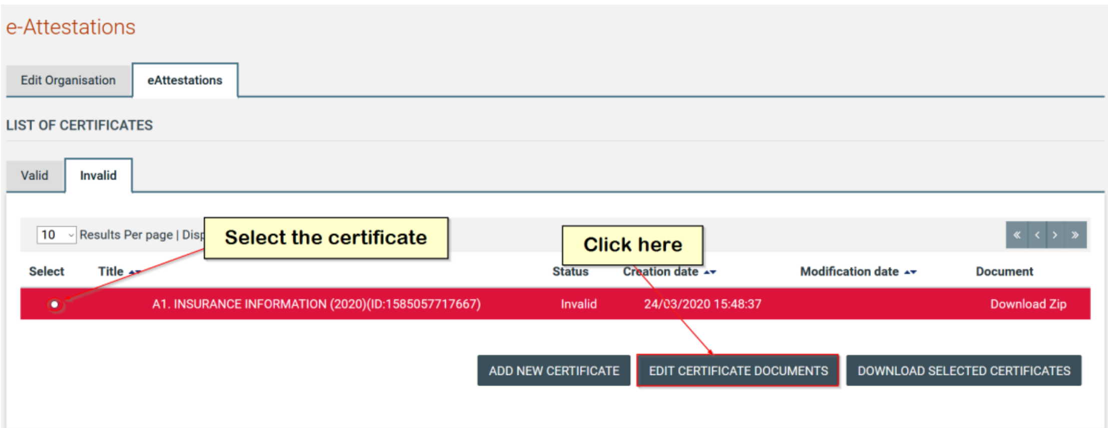


Figure 49: Added Certificate

In order for the user to edit a certificate criterion:

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

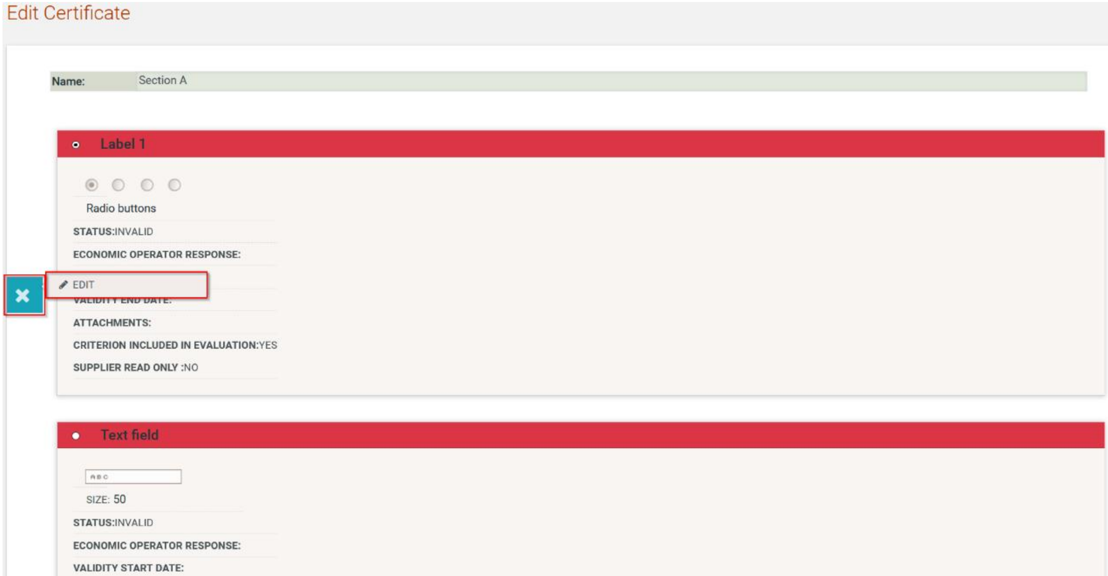


Figure 50: View Certificate Details

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

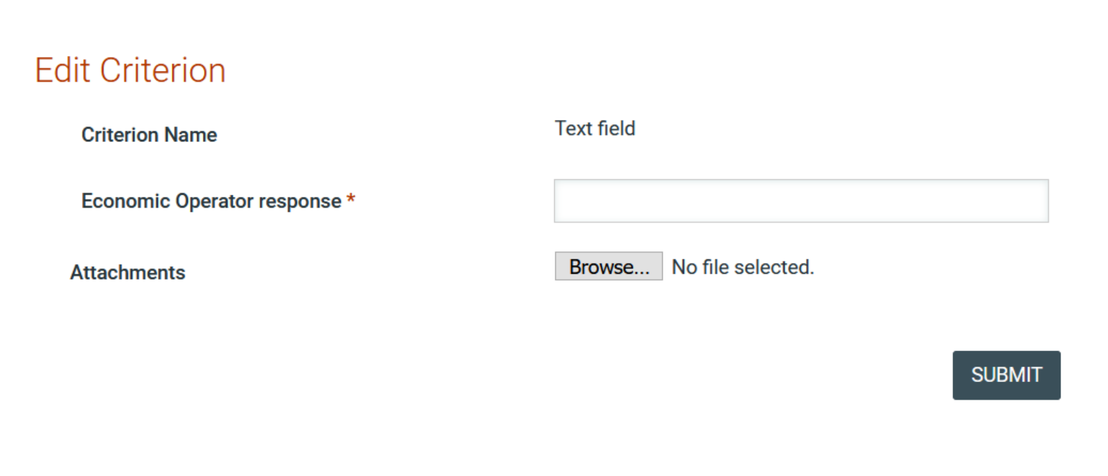


Figure 51: Edit Certificate Criterion

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

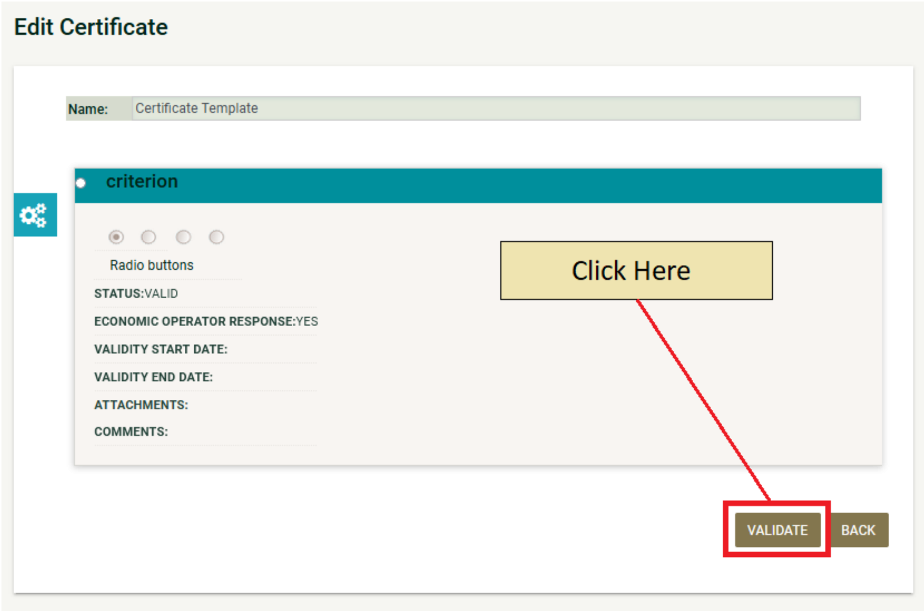


Figure 52: Validate Certificate

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

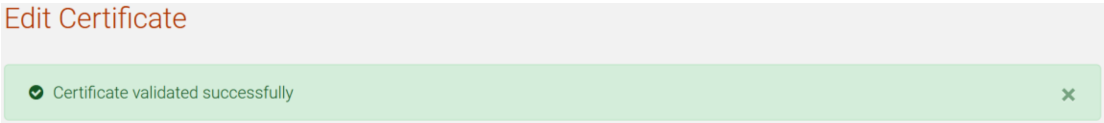


Figure 53: Certificate validates successfully

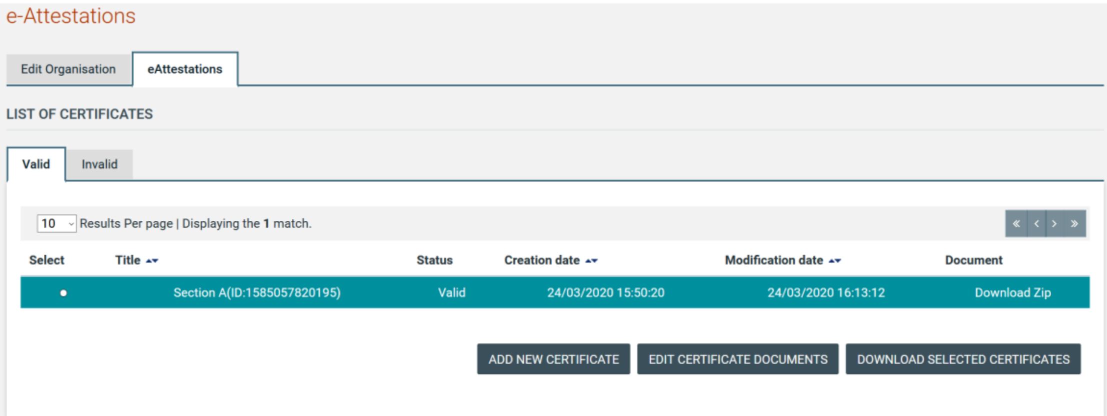


Figure 54: Valid Certificate

3.10.5 Correspondence

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

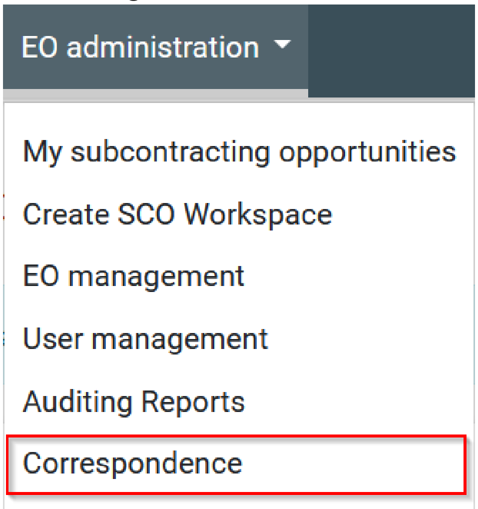


Figure 55 EO Administration Menu – Correspondence

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.

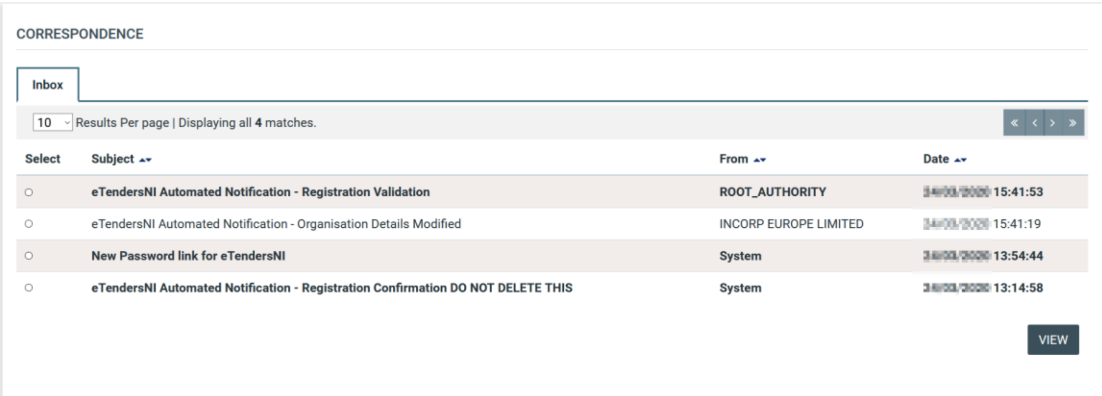


Figure 56 Correspondence functionality

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

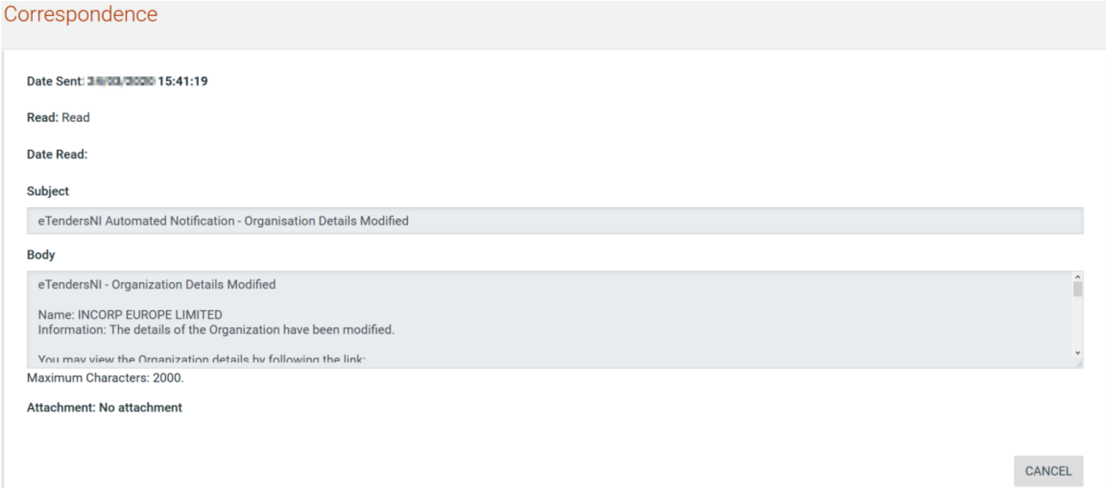


Figure 57 View an Incoming Message

3.10.6 Expression of Interest

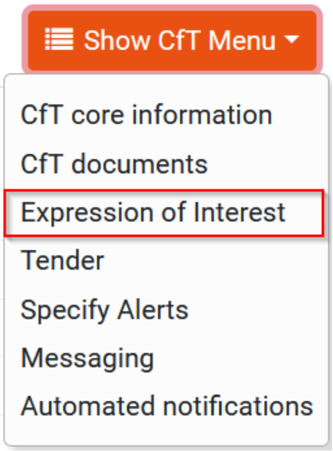


Figure 58 Show CfT Menu – Expression of Interest

When the user clicks on the “Expression of interest” button for the first time, the system will display the below figure. The user has to select one of these 2 options. If the user selects “Associate all users of my Economic Operator with this CfT”, then all Economic operators will have this CfT in the “List of my CfTs”.

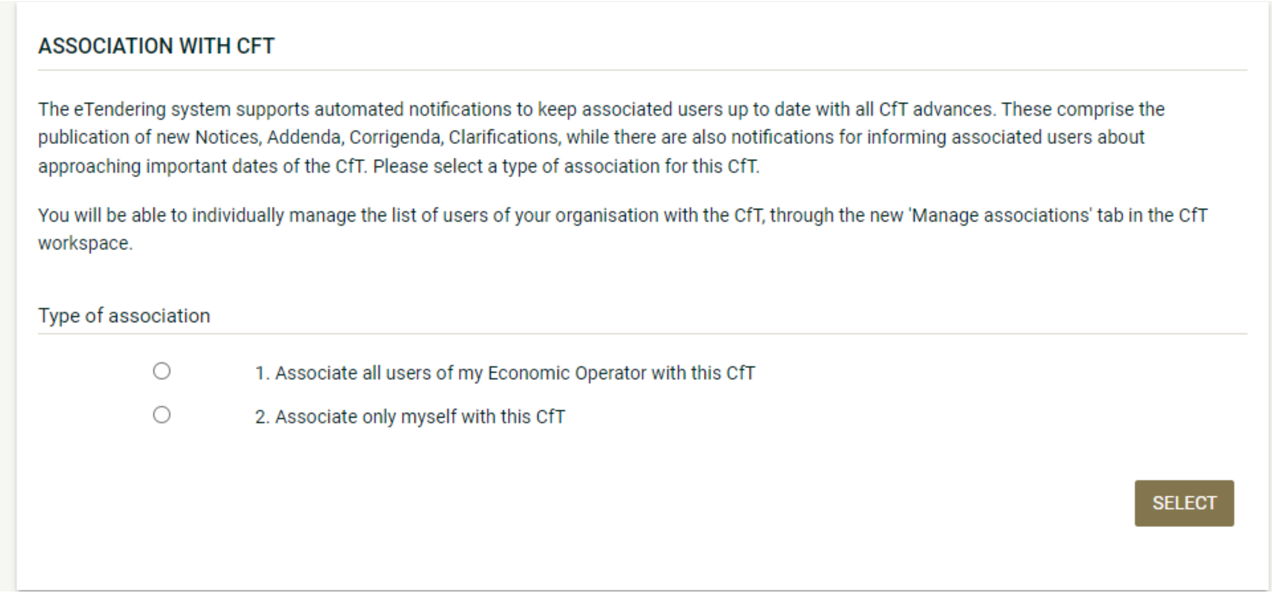


Figure 59 Association

3.10.7 Clarifications

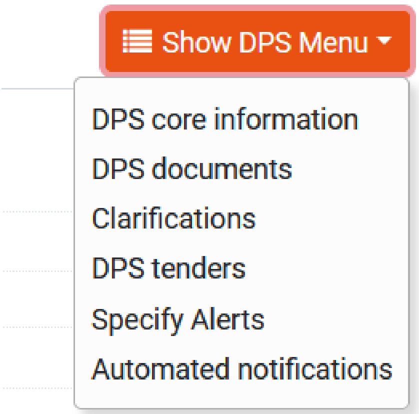


Figure 60 Show DPS Menu – Clarifications

The supplier is able to view the published clarifications from the Contracting Authority under the Clarifications tab. Using the (+) button the user is able to expand the clarification and see more details provided by the Contracting Authority. Supplier is also given the option to download all clarifications by selecting the “DOWNLOAD ALL CLARIFICATIONS” button, where a zip file will be downloaded with all the details within.

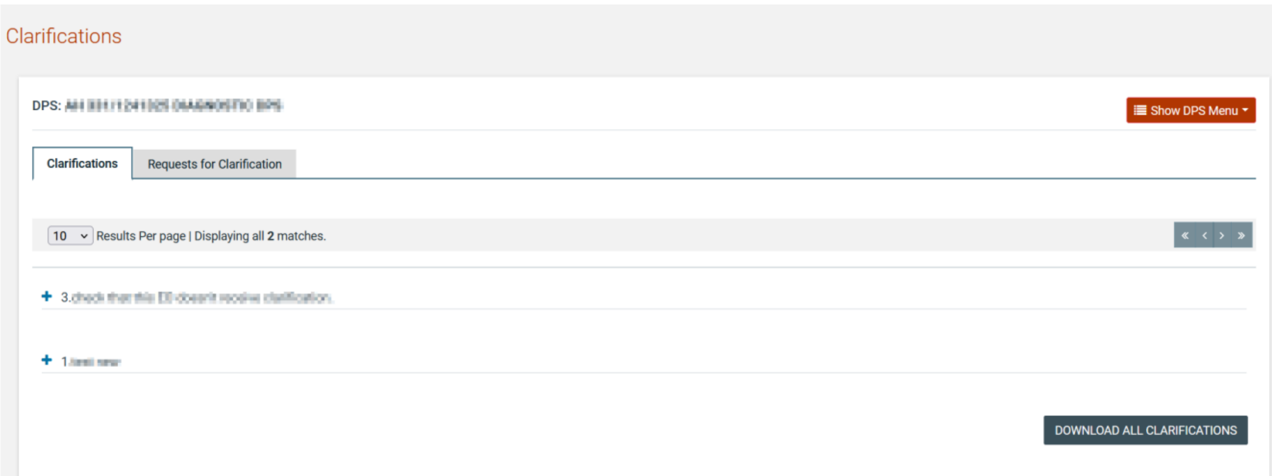


Figure 61 DPS- Clarifications

Also, they can Request for a clarification if they click on “Requests for Clarification” tab.

3.10.8 Automated Notifications

The user can be Associated and Disassociated from a CfT whenever they want. In order to be disassociated, the user can change 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 notifications in relation to the CfT, also they will not have this CfT under the "List of my CfTs" anymore.

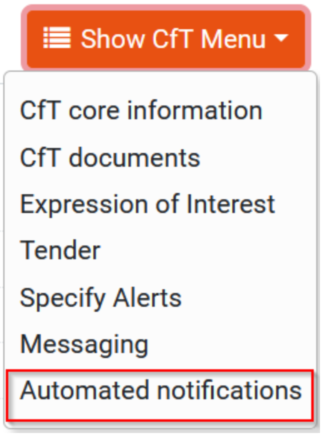


Figure 72 Show CfT Menu – Automated Notifications

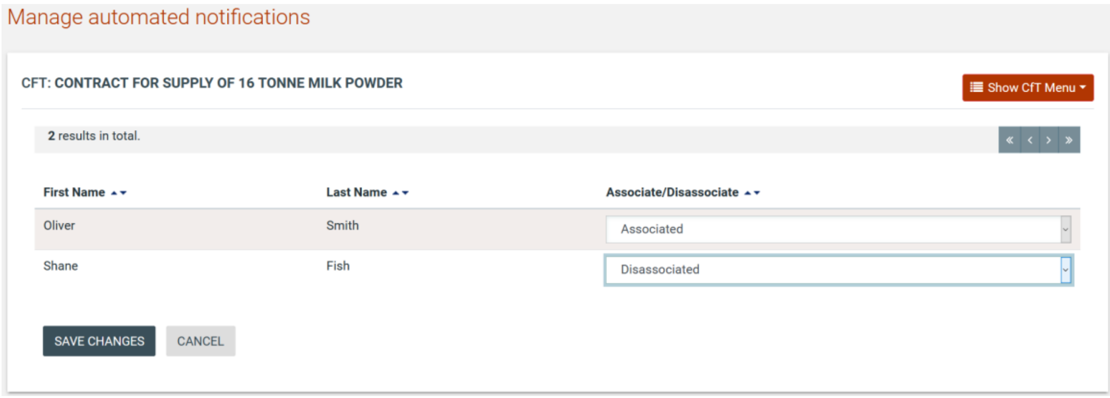


Figure 62 CfT – Automated Notifications

4 Search Functionality

The eTendersNI platform 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).

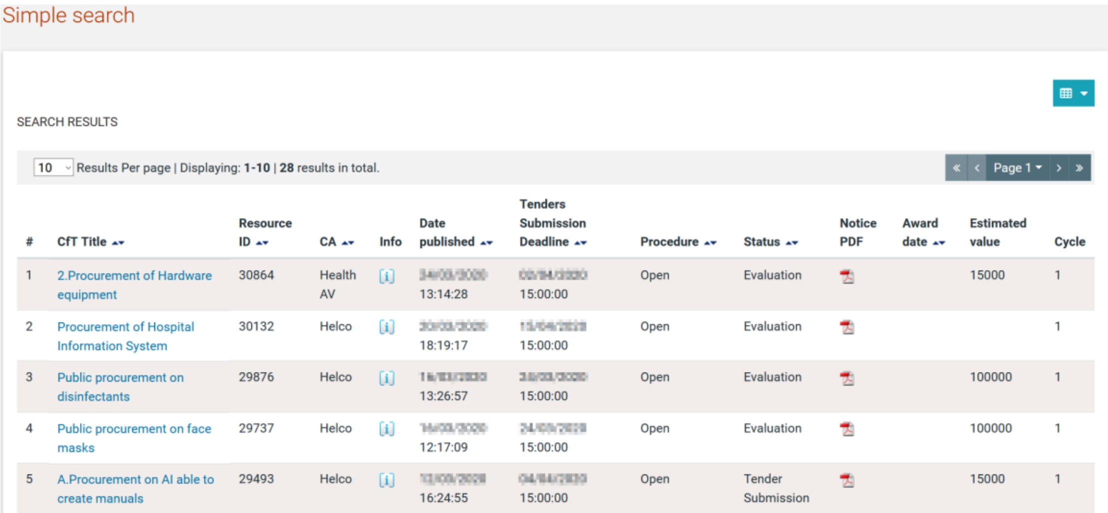
4.1 Simple Search

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 the following steps:

1. Click on the “ ” icon on the top-right corner.
2. Select the relevant search parameter (Call for Tender or Users) from the selection list
3. Please provide the full search term 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 63: Simple search for Call for Tenders

Figure 64: Simple search for Organisations

After performing a search for an organisation, the user can have access to the organisation's details through the selection of the organisation name, as can be seen below in Figure 65: Details of an Organisation.

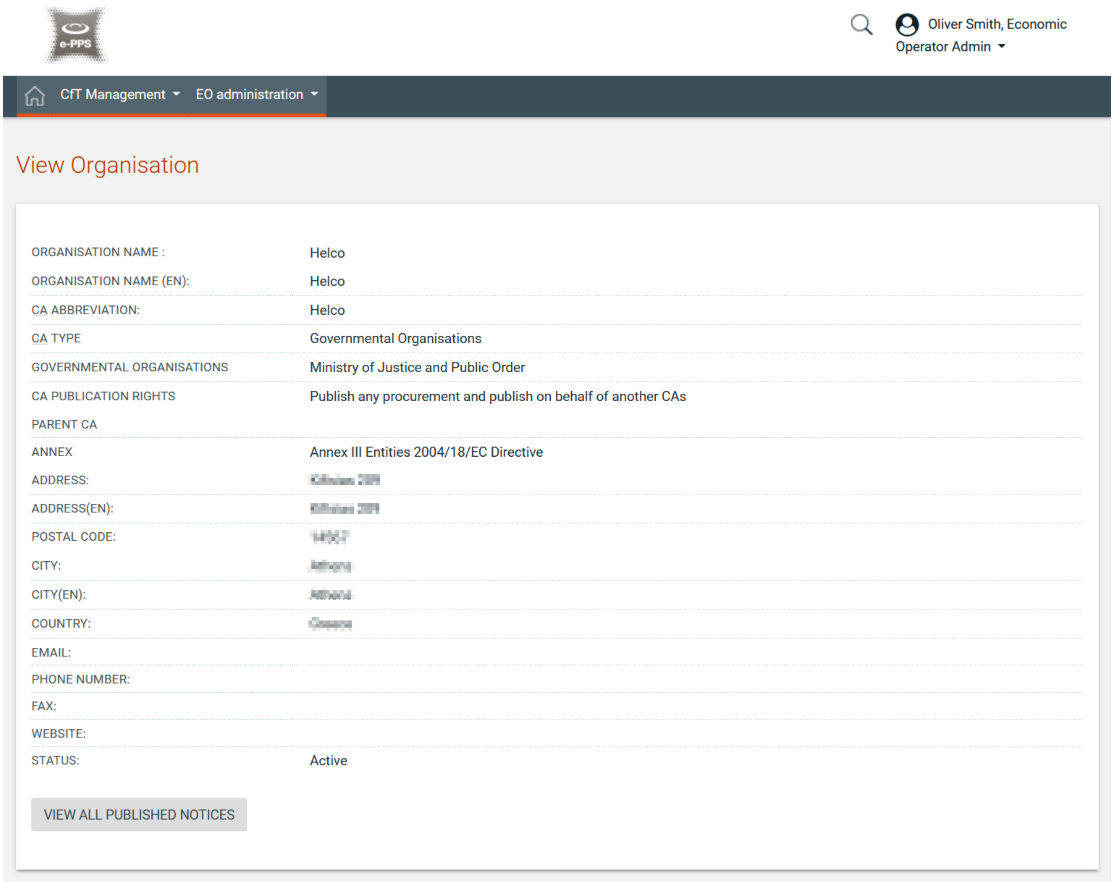


Figure 65: Details of an Organisation

The user can also have access to the published notices of this particular organisation if they click on the “VIEW ALL PUBLISHED NOTICES” button.

Published Notices

10 Results Per page | Displaying all **2** matches.

Type	Title	Date Upl.	Lang.	Status	Date Pub.
Contract Notice	Purchase of network devices	23/01/2023 11:35:14	EN	Published	23/01/2023 11:35:33
Design Contest Notice	Purchase of network devices B	23/01/2023 12:14:30	EN	Published	23/01/2023 12:14:38

Figure 66: View all Published Notices for an Organisation

Once the user click on the type of the notice they want to access, they will be asked whether they want to view or download it.

4.2 Advanced search

Return to Quick Guide

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 follow the steps presented below:

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, Organisation, User or Contract)
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

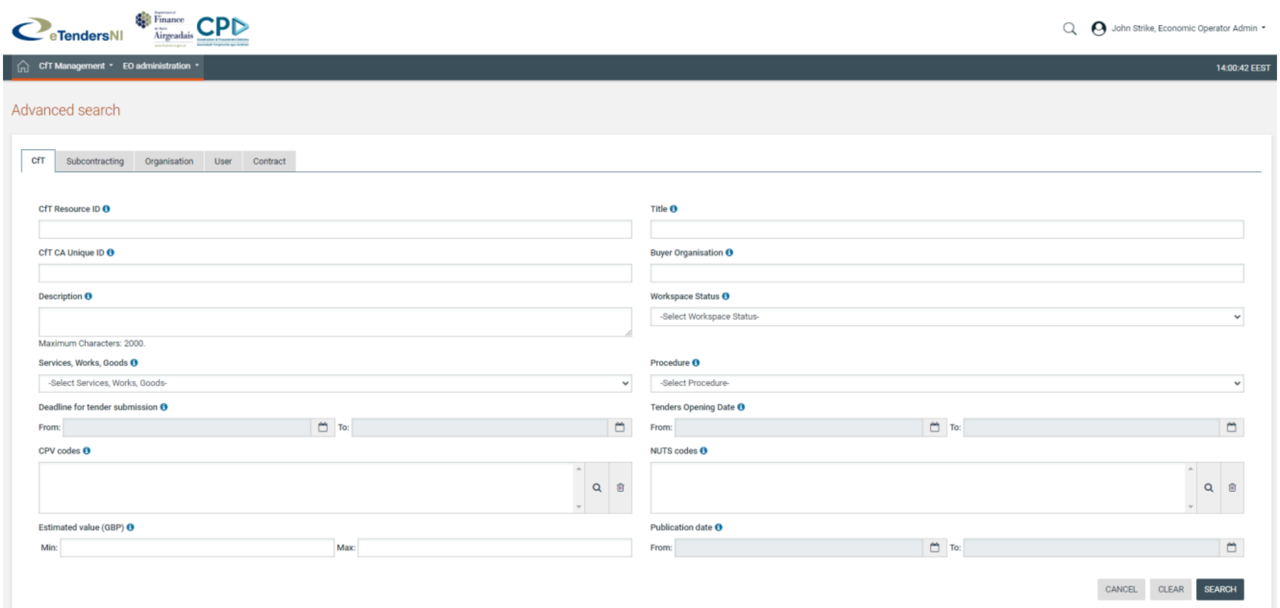


Figure 67: Advanced search functionality

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	[i]	[illegible] 14:04:14	[illegible] 15:00:00	Open	Evaluation			15000	1
2	2.Procurement of Hardware equipment	30864	Health AV	[i]	[illegible] 13:14:28	[illegible] 15:00:00	Open	Evaluation			15000	1
3	Proposed Community Hall at Annaclone GAC, Annaclone	30753	Health AV	[i]	[illegible] 11:52:33	[illegible] 15:00:00	Open	Evaluation			15000	1
4	Procurement of Hospital Information System	30132	Helco	[i]	[illegible] 18:19:17	[illegible] 15:00:00	Open	Evaluation				1
5	Online Assessment Survey (offline)	30326	Health AV	[i]	[illegible] 14:35:42	[illegible] 15:00:00	Open	Evaluation			15000	1
6	Online Assessment Survey	30172	Health AV	[i]	[illegible] 13:51:33	[illegible] 15:00:00	Open	Awarded		[illegible] 16:27:39	15000	1
7	Public procurement on disinfectants	29876	Helco	[i]	[illegible] 13:26:57	[illegible] 15:00:00	Open	Evaluation			100000	1

Figure 68: Advanced search results for Call for Tenders for an Economic Operator

The user can search for CfTs if they combine different criteria.
For example, they can search for all CfTs in tender submission status, from a specific Contracting Authority, with tender deadline in 2 months.

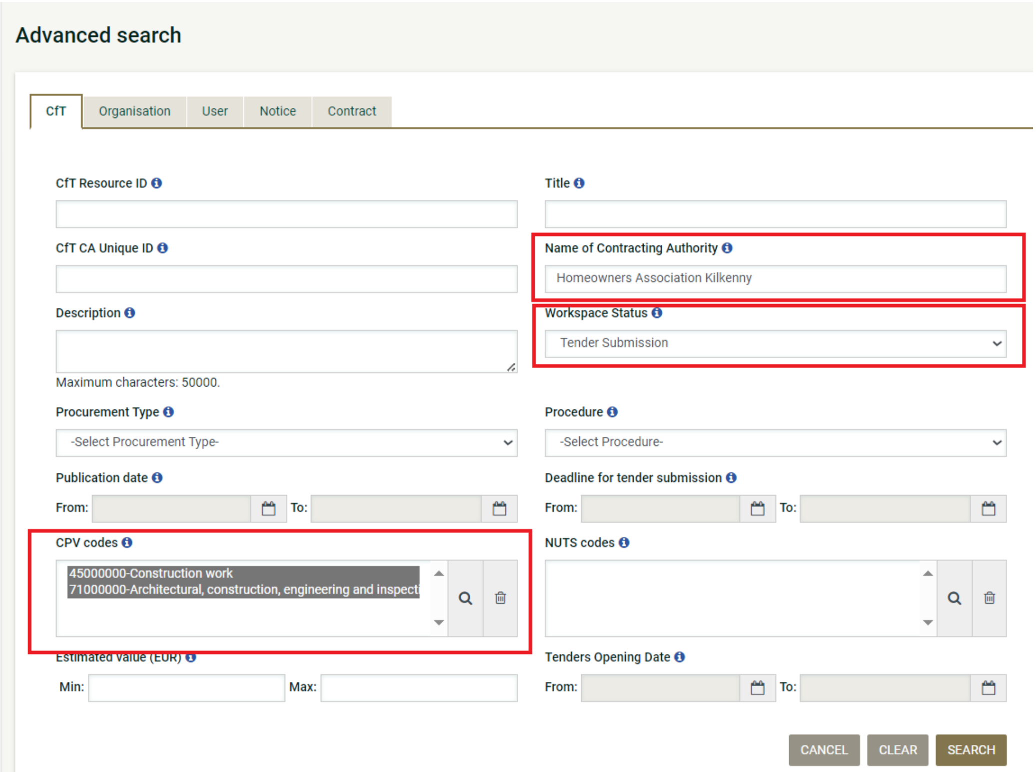


Figure 69 Advanced search - example

When they click "SEARCH" they will get the below results.

SEARCH RESULTS

10 Results Per page | Displaying all **2** matches.

#	Title	Resource ID	CA	Info	Date published	Tenders Submission Deadline	Procedure	Status	Notice PDF	Award date	Estimated value	Cycle
1	1/2024 Kilkenny - Multi party framework for provision of architectural services	216123	Homeowners Association Kilkenny		09/01/2024 15:10:09	01/02/2024 00:00:00	Restricted	Tender Submission			4.000.000,00	1
2	TS - 14/2023 Kilkenny - Roadworks in North Kilkenny	138723	Homeowners Association Kilkenny		07/06/2023 10:51:46	03/01/2025 15:00:00	Open	Tender Submission			250.000,00	1

10 Results Per page | Displaying all **2** matches.

Figure 70 Advanced search results combining different criteria

- Organisation Tab

In order to search for an organisation (e.g. Contracting Authority), the user should provide all the necessary information and to fill the search criteria that they need in order to retrieve the organisation.

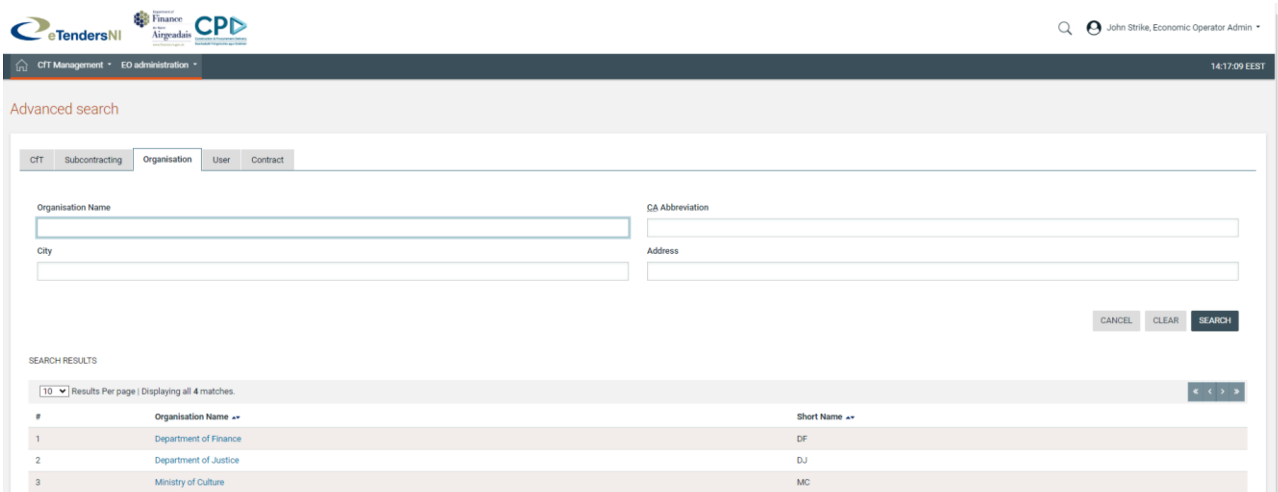


Figure 71: Advanced search results for Organisations for an Economic Operator

- User Tab

In order to search for a specific user of an organisation (Contracting Authority or Company), the user should first select the organisation type and then to provide the necessary information about the user to search for.

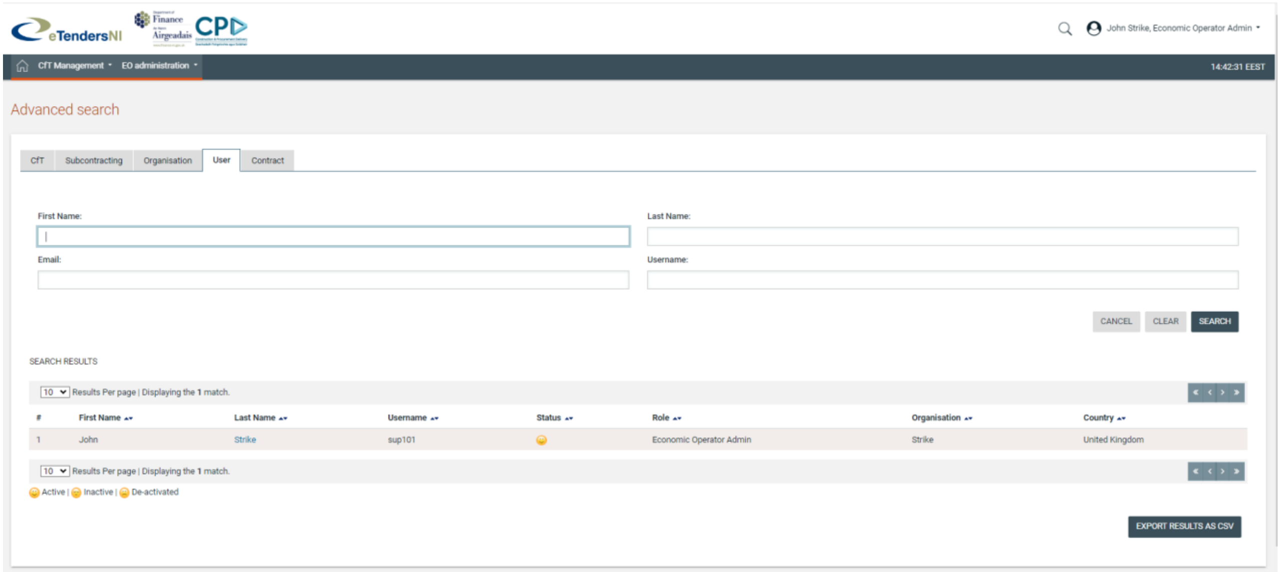


Figure 72: Advanced search for user for an Economic Operator

- Contract Tab

To search for a specific contract, the user must first select the contract type, provide the required details, and then click on "Search" to complete the process.

4.3 View Current Opportunities

In order to view the latest Call for Tenders published within the platform, 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 their access rights).

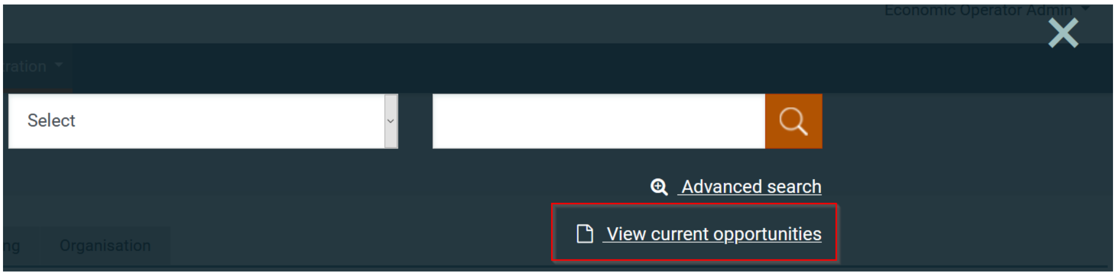


Figure 73: View Current Opportunities

5 Show CfT Menu

5.1 View CfT Workspace – CfT Core information

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**.

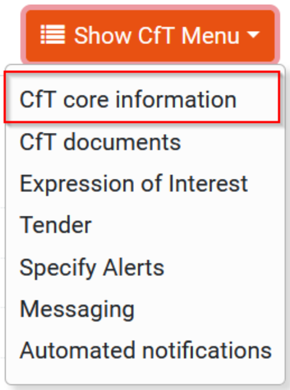


Figure 74: "CfT core information" option in the "Show CfT Menu"

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.).

View CfT Workspace

CFT: CONSTRUCTION OF "ATTIKI ODOS" EXTENSION

Show CfT Menu

NAME OF CONTRACTING AUTHORITY:	European Investment Bank
TITLE:	Construction of "Attiki Odos" extension
CFT CA UNIQUE ID:	
EVALUATION MECHANISM:	Price/Cost Effectiveness
DESCRIPTION:	testing purposes
PROCUREMENT TYPE:	Works
DIRECTIVE:	2014/24/EU (Classic)
PROCEDURE:	Open
CFT INVOLVES:	A Public Contract
CPV CODES:	45000000-Construction work
AWARD PER ITEM:	No
INCLUSION OF E-AUCTIONS :	No
NUTS CODES:	
ESTIMATED VALUE (EUR):	2,000,000,000
ABOVE OR BELOW THRESHOLD:	Above
TIME-LIMIT FOR RECEIPT OF TENDERS OR REQUESTS TO PARTICIPATE:	19/04/2023 00:00
DEADLINE FOR DISPATCHING INVITATIONS:	
END OF CLARIFICATION PERIOD:	18/04/2023 00:00
UPLOAD OF DOCUMENTS WITHIN THE CLARIFICATIONS:	Yes
TENDERS OPENING DATE:	19/04/2023 00:30
ALLOW SUPPLIERS TO MAKE AN ONLINE EXPRESSION OF INTEREST:	Yes
CONTRACT AWARDED IN LOTS:	No
CONTRACT DURATION IN MONTHS OR YEARS, EXCLUDING EXTENSIONS:	3 months
VALIDITY OF TENDER IN DAYS OR MONTHS:	90 days
EU FUNDING:	Yes
MULTIPLE TENDERS WILL BE ACCEPTED:	Yes
DATE OF PUBLICATION/INVITATION:	31/03/2023 15:17
TED LINKS FOR PUBLISHED NOTICES:	
DATE OF AWARDING:	
LANGUAGE OF PUBLICATION:	EN
NUMBER OF OPENERS:	One

Figure 75: View CfT workspace

5.2 Viewing the Tender's 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), the user should select the "**CfT documents**" option from the "**Show CfT Menu"**.

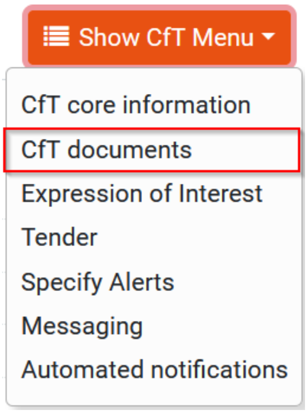


Figure 76: "CfT documents" option in the "Show CfT Menu"

The platform displays all published OJEU 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 they need to select the relevant link in the "**Type**" column.

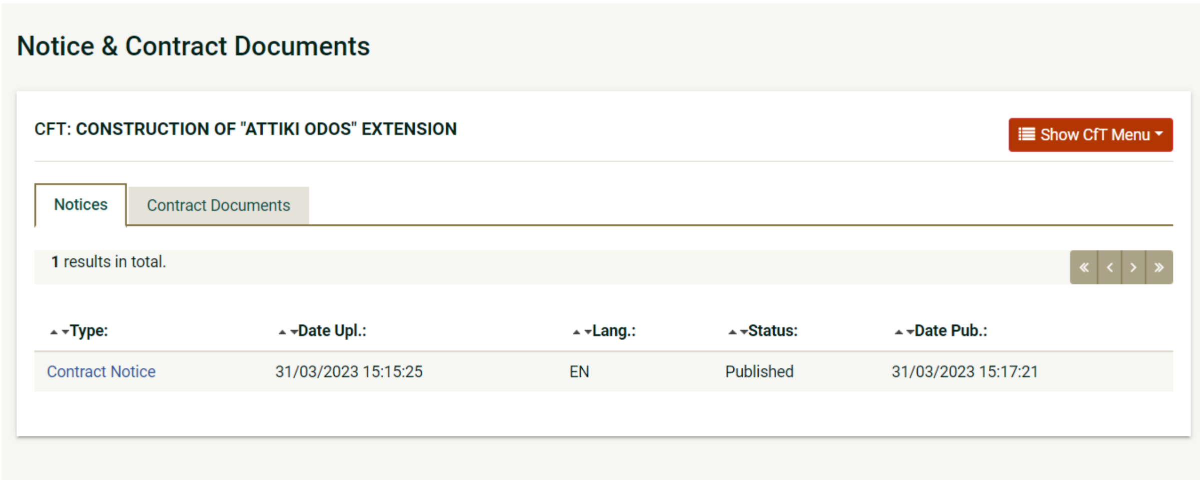


Figure 77: Contract Notices

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

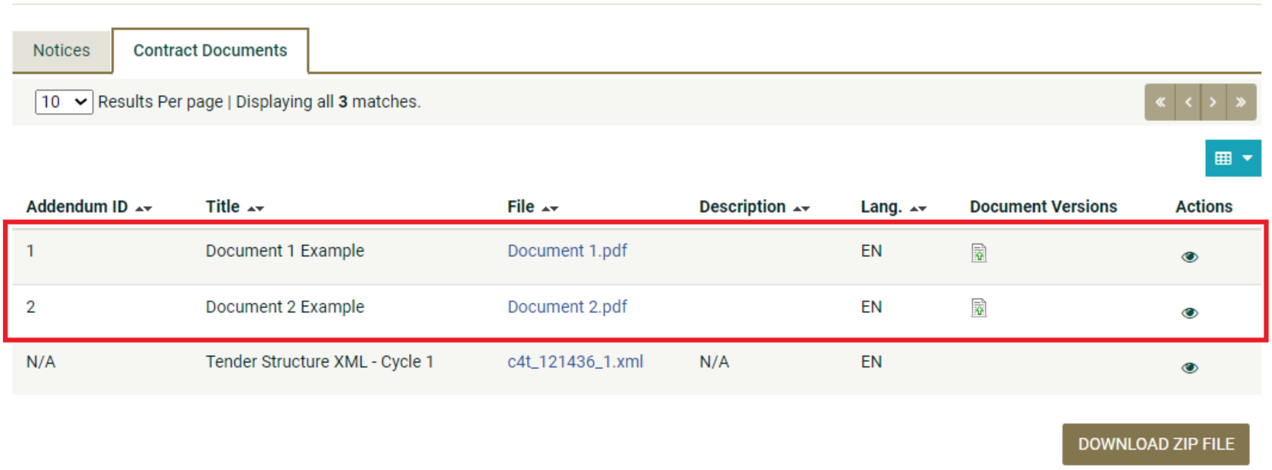


Figure 78 Contract documents

Please note that the xml file can be disregarded. It is the published XML version of the Tender Structure that was created for this CfT (machine readable file), and that can be used only for system audit purpose.

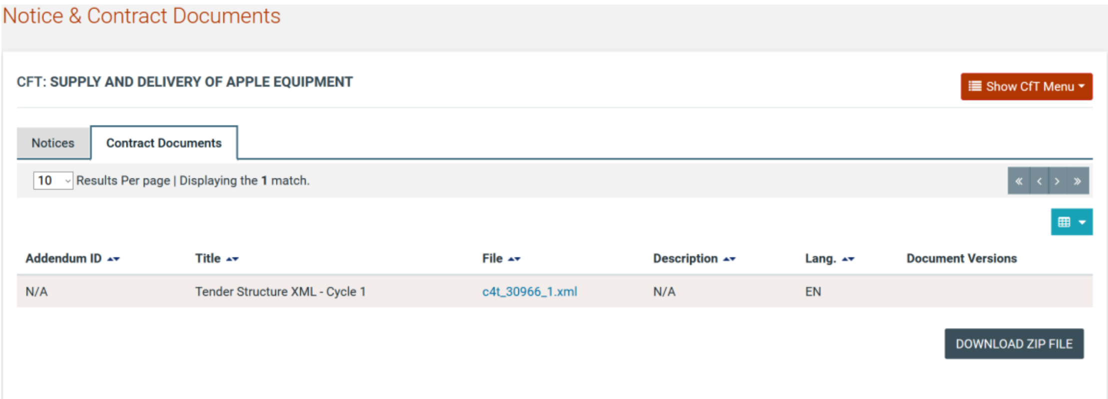


Figure 79: Contract documents – xml file

5.3 Expressing an Interest in a Tender

In order for the user to express an interest in a call for tender (e.g. CfT) they need to select the "**Expression of Interest"** option from the "**Show CfT Menu"**.

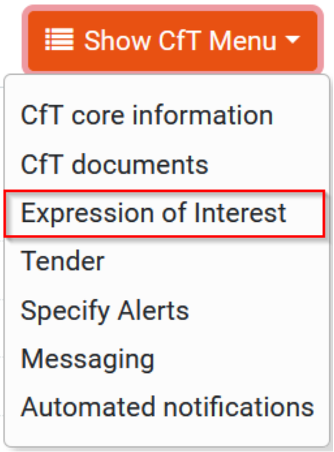


Figure 80: "Expression of Interest" option in the "Show CfT Menu"

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.

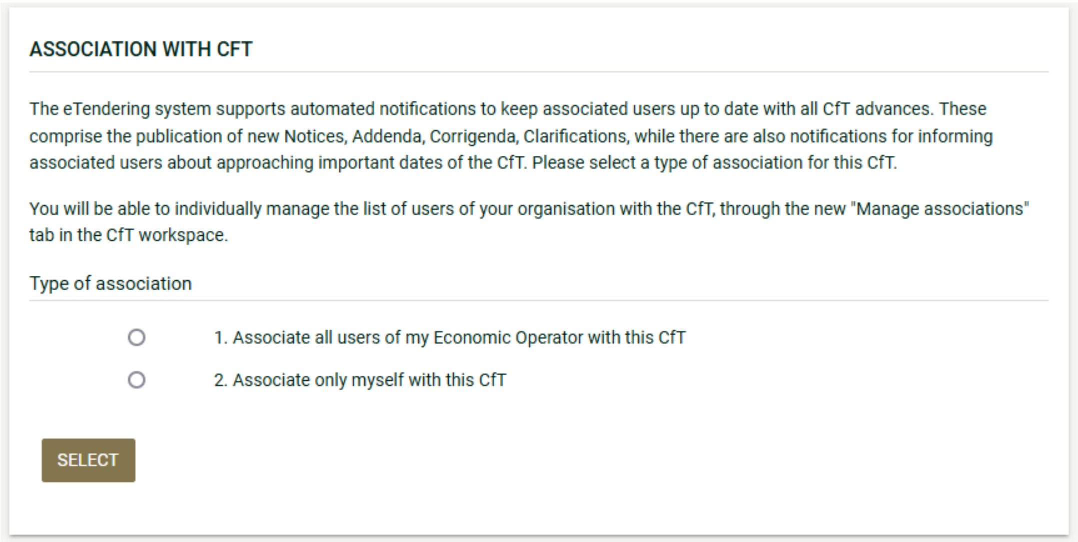


Figure 81: Register for notifications, association of users

Once the user expresses an interest in the Call for Tender, it will be displayed under the "List of my CfTs" as depicted in the below screenshot.

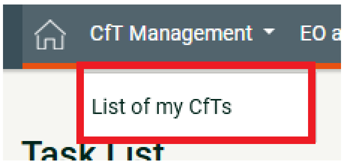


Figure 82: Selection of "List of my CfTs" option

List of My Cfts

10 Results Per page | Displaying: **1-10** | **133** results in total. Page 1

#	Title	Resource ID	Type	Status	Submitted Tender
1	1/2023 - Kilkenny - Public park bench supply	114671	Supplies	Tender Submission	No
2	Procurement of computers	104915	Services	Awarded	Yes
3	Procurement of computers	104777	Services	Awarded	Yes
4	Procurement of office suplies	104442	Services	Awarded	Yes
5	Procurement of office supplies	103813	Services	Awarded	Yes
6	test 2	103624	Services	Awarded	Yes
7	test	103479	Services	Awarded	Yes
8	Procurement of hardware system	102817	Services	Awarded	Yes
9	procurement of chairs	100837	Services	Awarded	Yes

Figure 83: List of my CfTs

5.4 Automated tender notifications

In order to associate and disassociate users of the EO organisation from receiving notifications in relation to a specific 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"**.

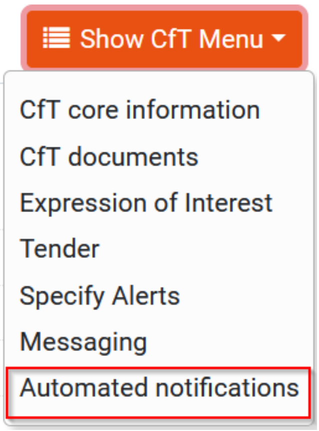


Figure 84: "Automated notifications" and "Specify alerts" options in the "Show CfT Menu"

5.4.1 Automated notifications

The system lists all user members of the EO organisation. In order to disassociate an EO member from receiving a notification in relation to a 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 notifications in relation to a tender.

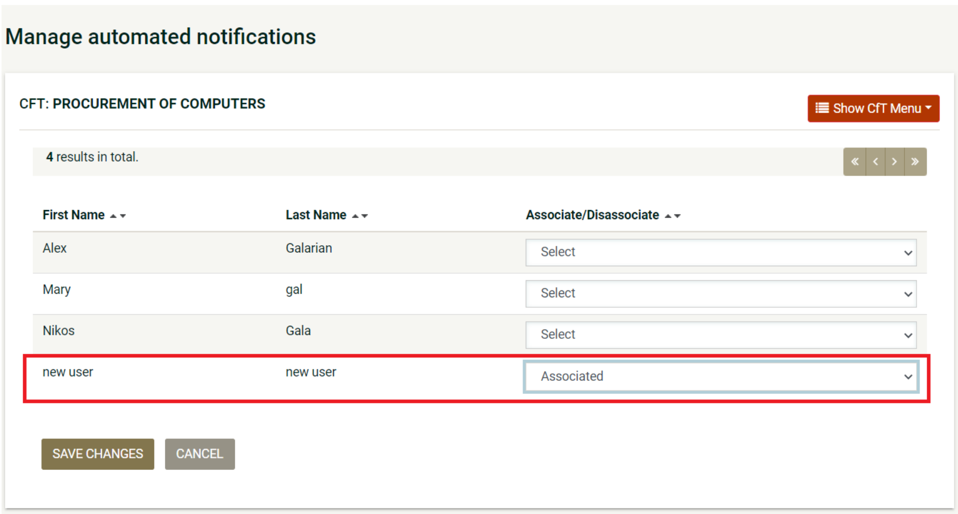


Figure 85: List of associated users within a CfT

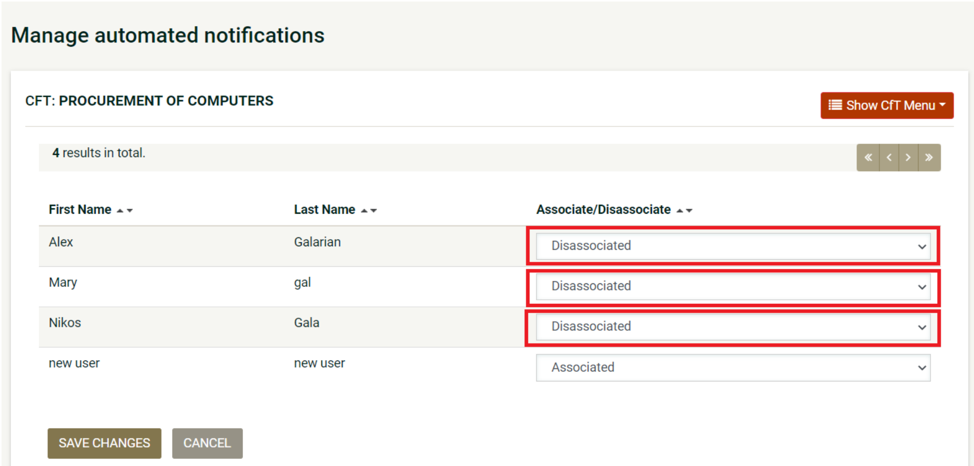
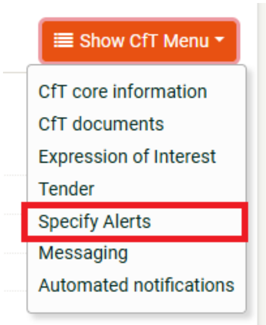


Figure 86: Disassociation of a user from a CfT

5.4.2 Specified User Alerts



The users can specify the timing of alerts for 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 to the event
- 48 hours prior to the event
- 1 week prior to the event
- 2 weeks prior to the event

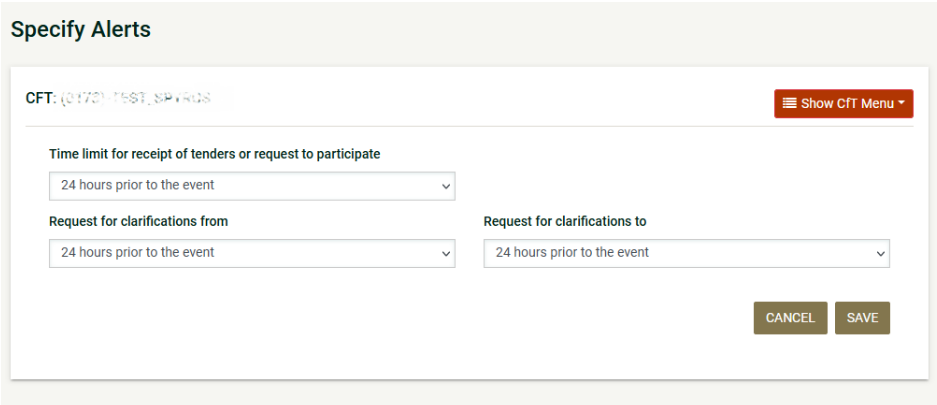


Figure 87: Specification of users alerts

5.5 Clarifications functionality

(This option is available only if applicable for the particular CfT)
In order to create a message and to preview a message response, the user should select the "**Messaging**" option from the "**Show CfT Menu**".

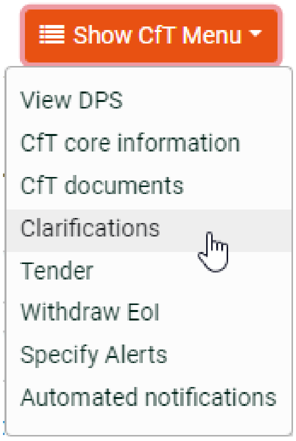


Figure 88: "Clarifications" option from menu

5.5.1 Viewing Clarifications

The supplier is able to view the published clarifications from the Contracting Authority under the Clarifications tab. Using the (+) button the user is able to expand the clarification and see more details provided by the Contracting Authority.

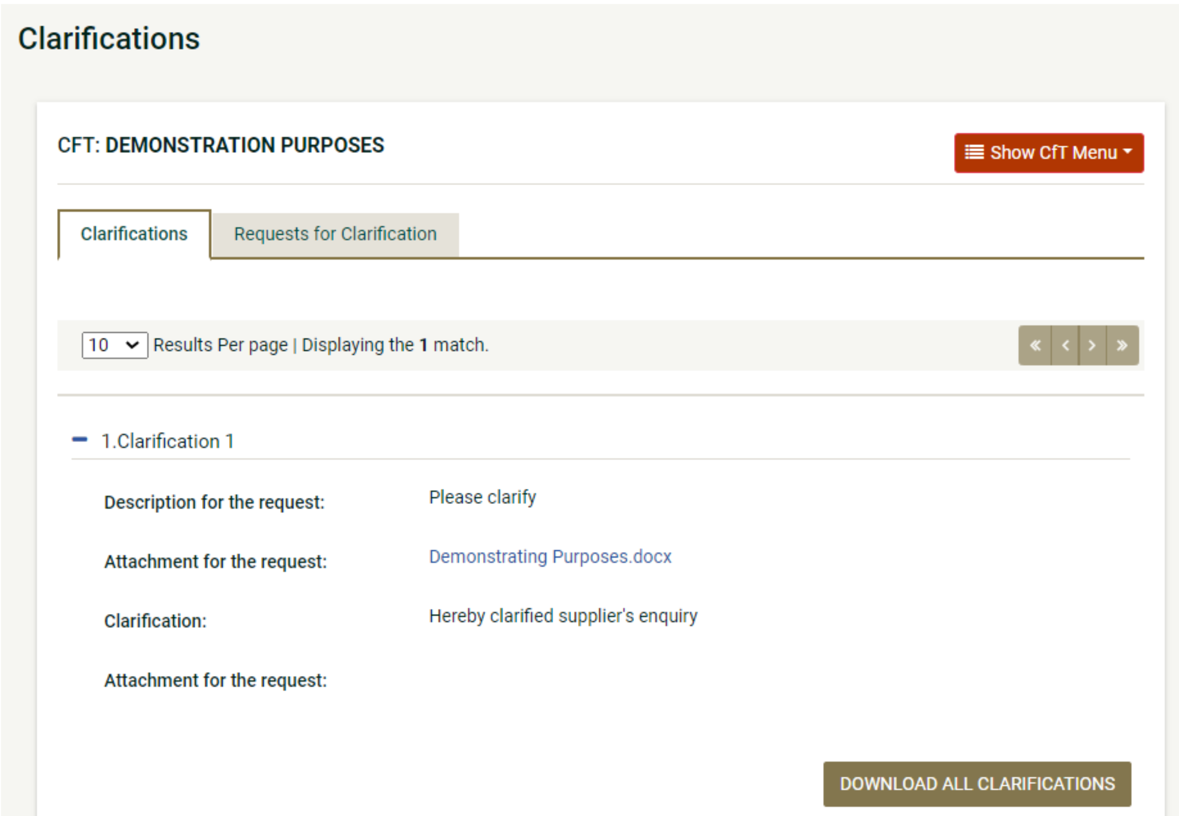


Figure 89: "Clarifications" option from menu

Supplier is also given the option to download all clarifications by selecting the "DOWNLOAD ALL CLARIFICATIONS" button, where a zip file will be downloaded with all the details within.

5.5.2 Submitting a request for clarification

The supplier is able to submit a clarification request by selecting the Requests for Clarification tab. As soon as the supplier fills in all the mandatory information and clicks on "SEND REQUEST" the clarification request is sent to the Contracting Authority to answer. The attachment cannot exceed the size of 500MB.

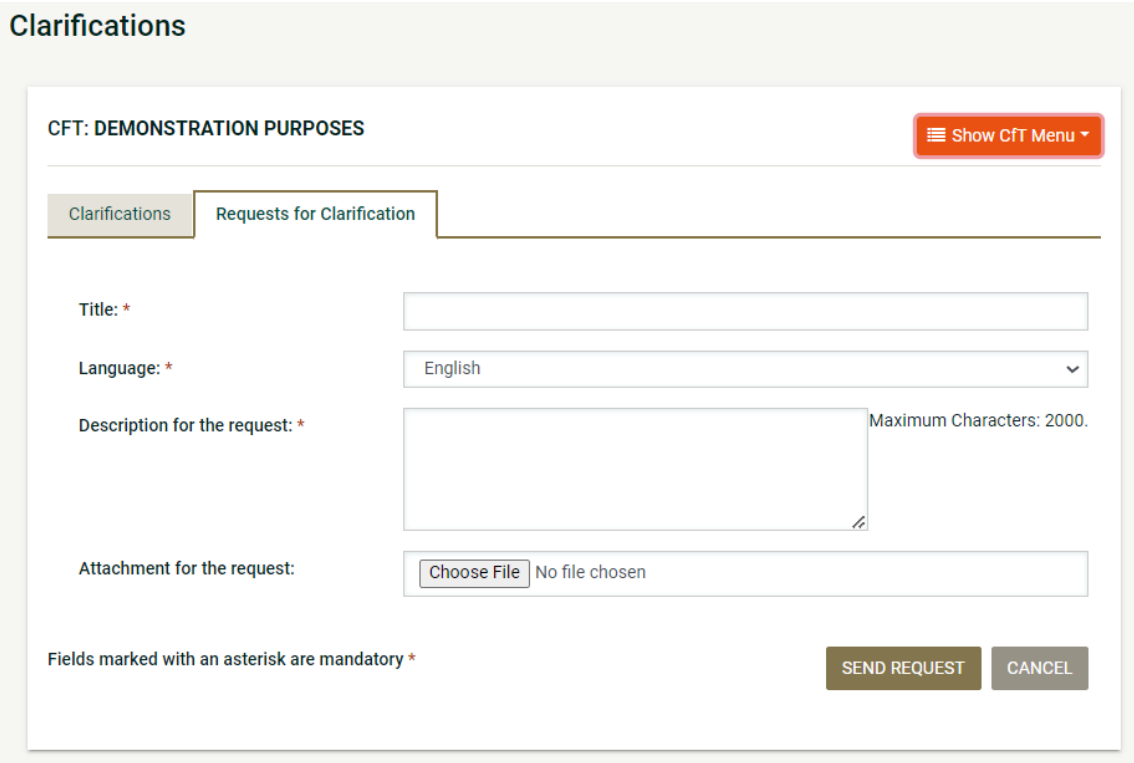


Figure 90: "Clarifications" option from menu

5.6 Messaging functionality

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 tender.

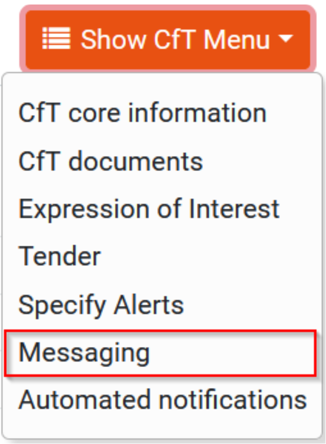


Figure 91: “Messaging” option in the “Show CfT Menu”

5.6.1 Creating 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.

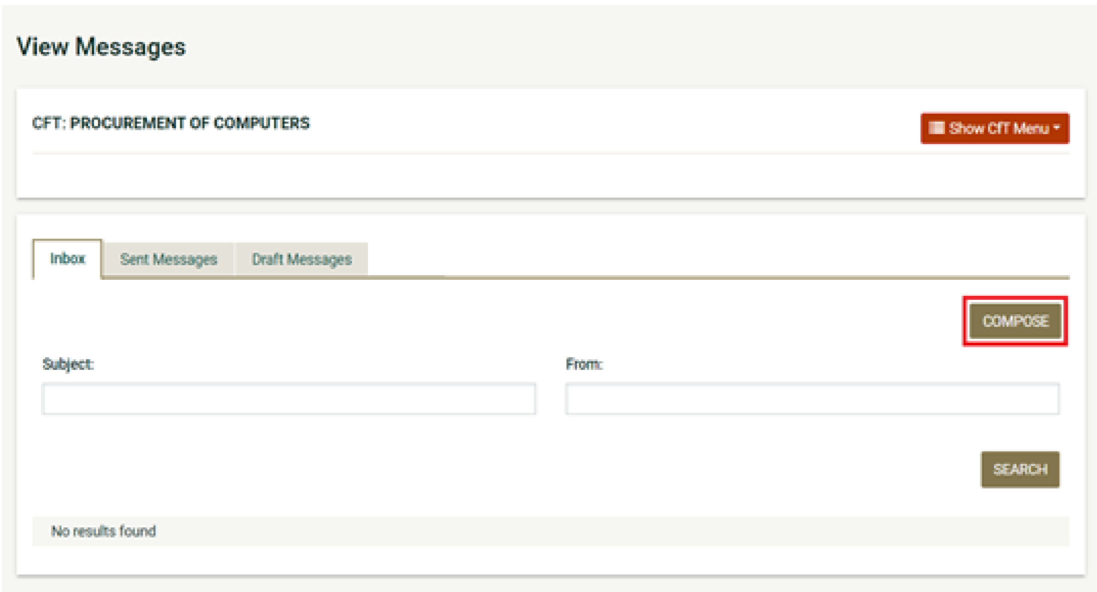


Figure 92: CfT Messaging

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

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

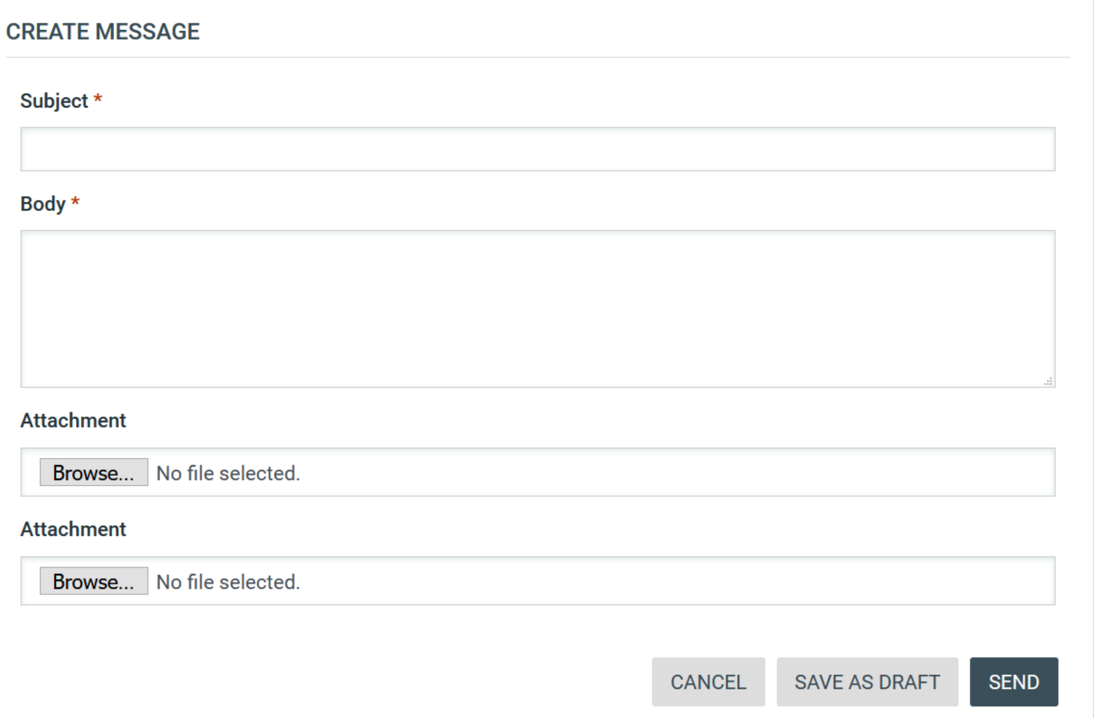


Figure 93: Send a message

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 “**BACK**” button, the form is closed and the message is deleted.

5.6.2 Viewing a message

The user can visualise 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.

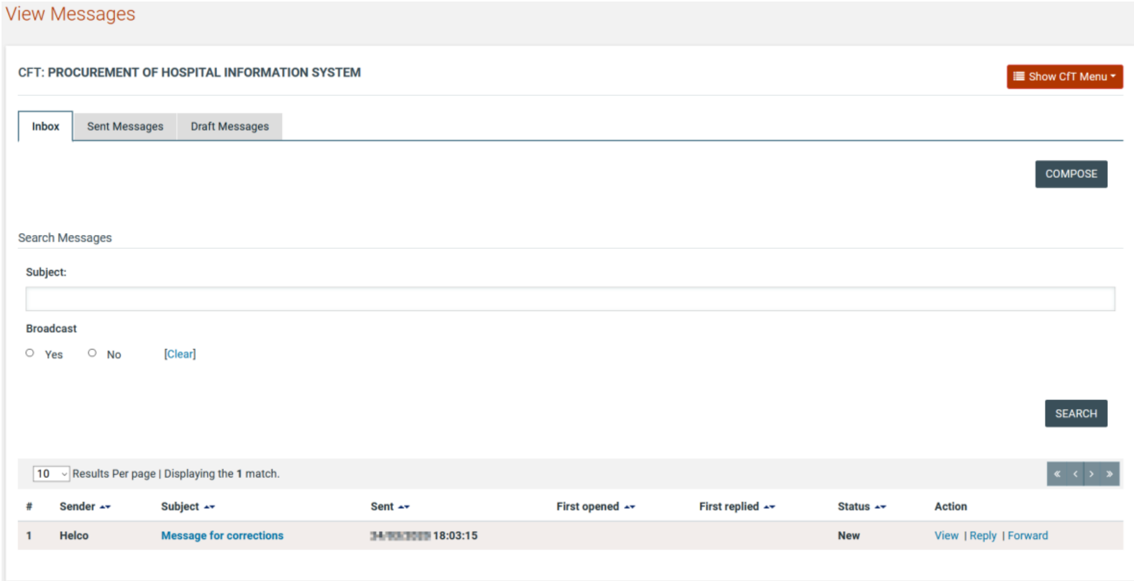


Figure 94: List of messaging responses & search message functionality

The user can 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**”, the system displays the “Date” as well as the “Time” when the message was as can be seen in Figure 95: Response to a message.
- In the “**First replied**”, 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 on “**Subject**” column or the “**View**” link below the “**Action**” column. Then, the system opens a new window displaying all the valuable data as regards the response:

After opening a new message, the message status is changed into “Read” and the particular message is loaded in a pop-up window, which displays the following items:

a. View Message section:
   1. MESSAGE ID: The message identifier given by the system.
   2. Sender: Name of the organization sender of message.
   3. Subject: Title of message.
   4. Sent on: Date and time when the message was sent.
   5. First Opened: This field displays the date and time the recipient opened the

message for the first time.

6. First Replied: This field displays the date and time the message was first replied. Between brackets the system displays the number of times the particular message has been replied.
7. Status: Message status, as follows:
   I. New: The message has been sent but no user has accessed the particular message.
   II. Read: At least 1 recipient of the message has accessed the message. In case several users have accessed it, then the number of users is displayed between brackets.
   III. Replied: The message has been replied. In case the message has been replied several times, then the number of replies will be displayed between brackets.

b. Body: It displays the content of the message.

c. Action bar:
   1. **REPLY** (reply to a message)
   2. **PRINT** (download a hardcopy of all messages)
   3. **FORWARD** (forward the particular message)
   4. **BACK** (cancel the action)

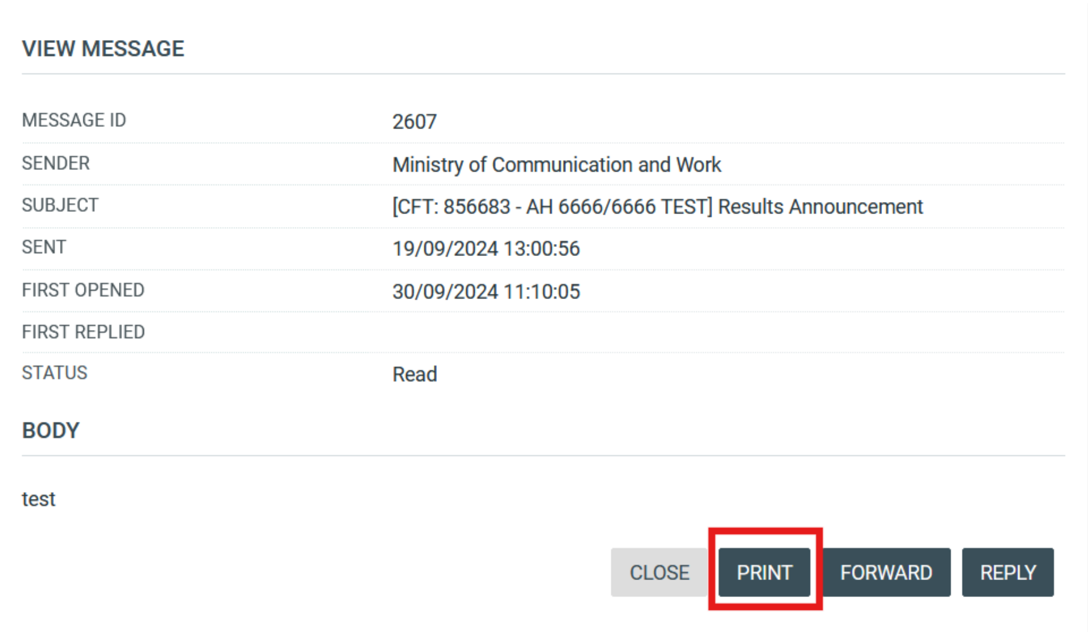


Figure 95: Response to a message

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

5.6.3 Replying to on Message

In order to reply to a message, select the “Reply” link displayed in the Messaging Inbox or the “REPLY” button displayed in the “View Message” page.

The system shows the Reply Message page, which includes the following items:

a. Message subject (text field)
b. Sender (Name of the organization that dispatched the message)
c. Message body (text area)
d. Message attachment (file attachment). Up to 2 files to each message (each file with a maximum size of 250MB).
e. Action bar:

1. **SEND**
2. **SAVE AS DRAFT**
3. **BACK**

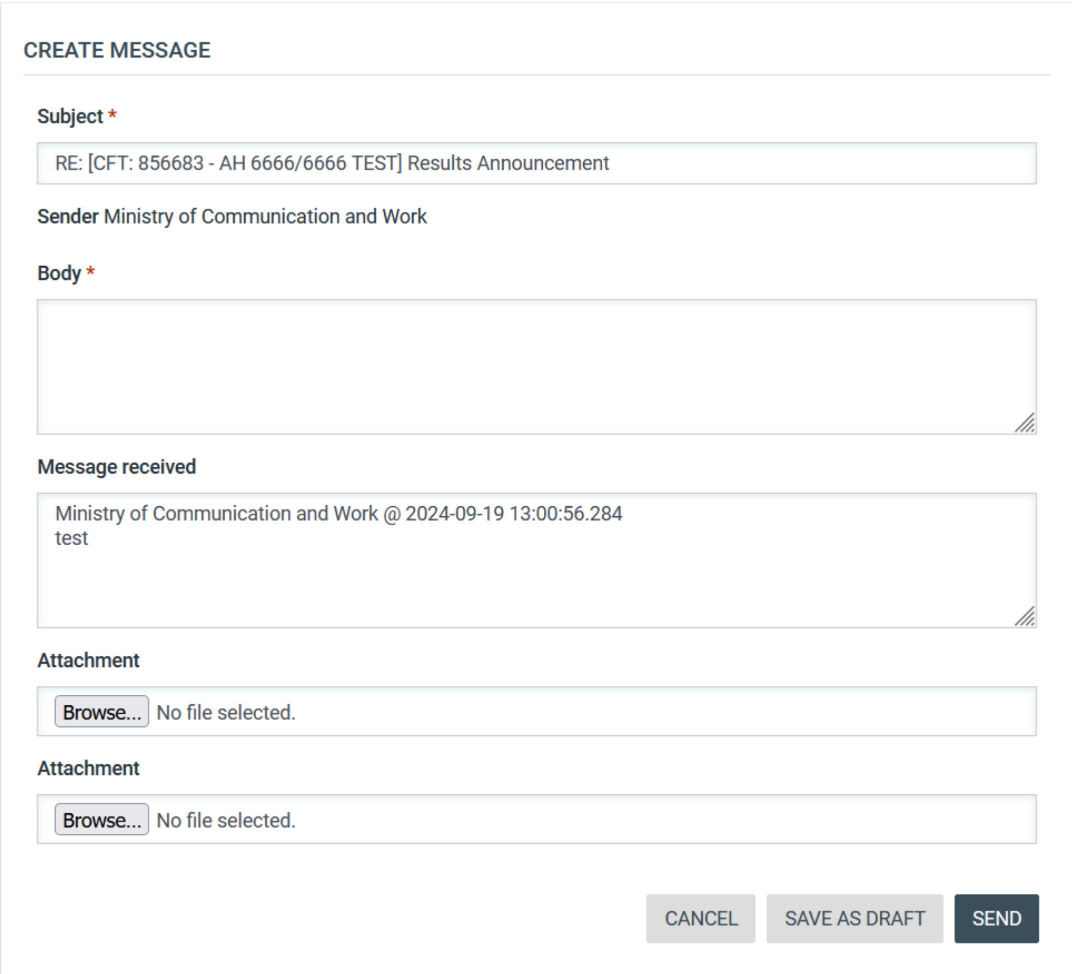


Figure 96: Message Reply functionality

The uploaded file must have one of the following types: [7z, avi, csv, doc, docm, docx, docx, dot, dotx, dwg, e0x, fr, geojson, info, jpeg, jpg, json, mov, mp4, mpp, msg, odp, ods, odt, p7m, pages, pdf, png, ppt, pptx, rar, rtf, svg, tar, tiff, txt, util, webp, wmv, xls, xlsb, xlsm, xlsx, xml, zip, zipx].

5.6.4 Forwarding a Message

The user selects the message's "**Forward**" icon from the "**Action**" column in order to forward a particular message. The "**Forward**" icon is available on "**Action**" column in "**Inbox**" and "**Sent Messages**" tab.

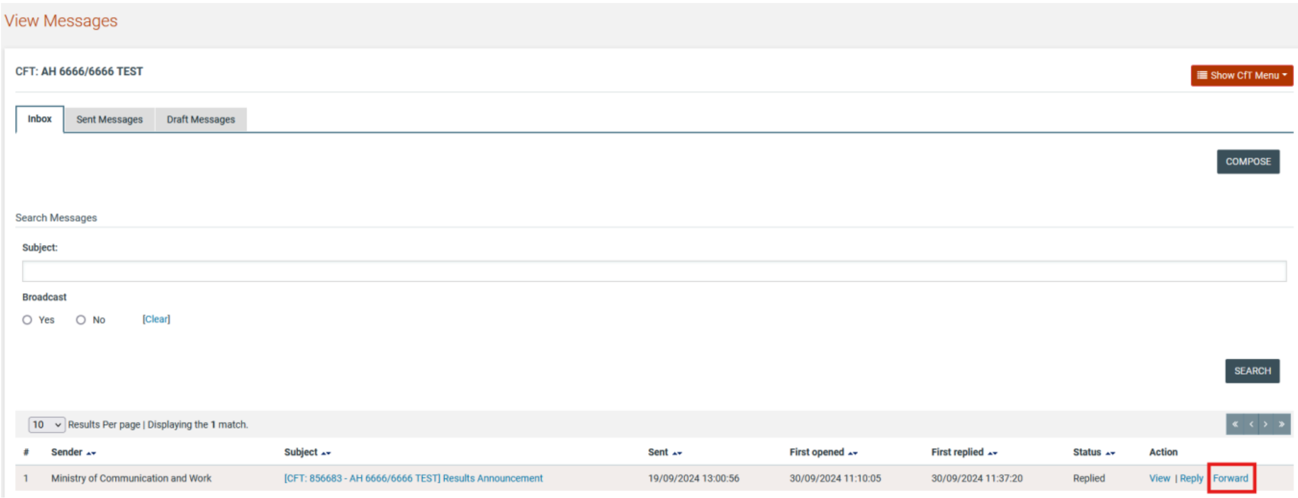


Figure 97: Forward message functionality

The system displays the following data in a pop-up window:

a. Forward Message section:

1. Subject: Title of the message.
2. To: Recipient of the message forwarded (PO/TC, PO/ESR users can provide one or multiple e-mail addresses, separated by semicolons, the recipients of the forwarded message do not have to be registered with eTendersNI).
3. Body: Editable text area for PO/TC, PO/ESR users.
4. Attachment: (file attachment) up to 2 files to each message.

b. Action bar:

1. SEND

2. BACK

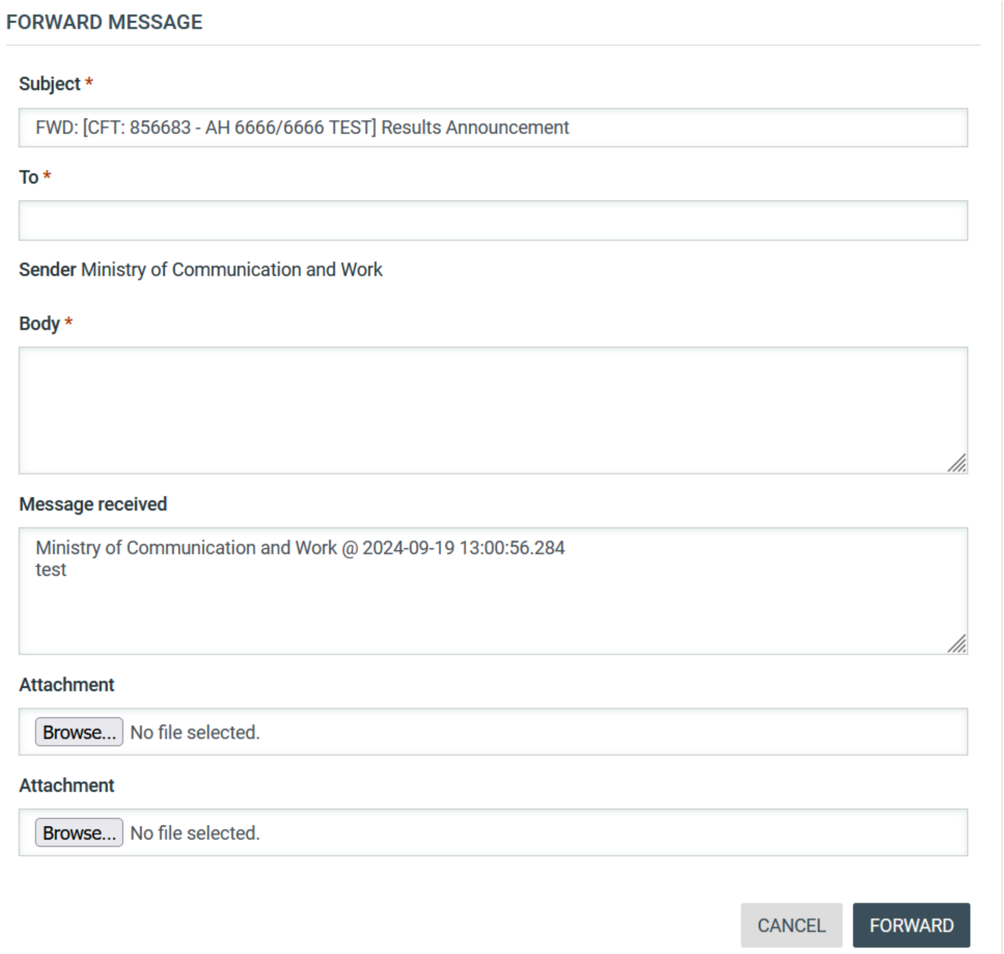


Figure 98: Forward message form

5.6.5 Viewing Draft Messages

The user needs to select the “Draft messages” tab. The system displays the Draft messages list. For each message, the following information columns are displayed:

a. Compose button: Click here to create a new message
b. Search Message: section in order to search for a message
c. The “Draft Messages”, which displays the following information for each message:
   1. Recipients: the name of the recipient organization.
   2. Subject: Title of the message.
   3. Action: The following actions are available:
      I. **Edit:** opens the message in editable mode and pre-fills all data already saved.
      II. **Delete:** removes the message from the list of Draft Messages

6 Creating a Tender Response

A tender response is created by the Economic Operator and comprises the qualification, 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**".

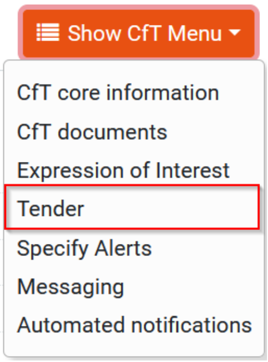


Figure 99: "Tender" option in the "Show CfT Menu"

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.

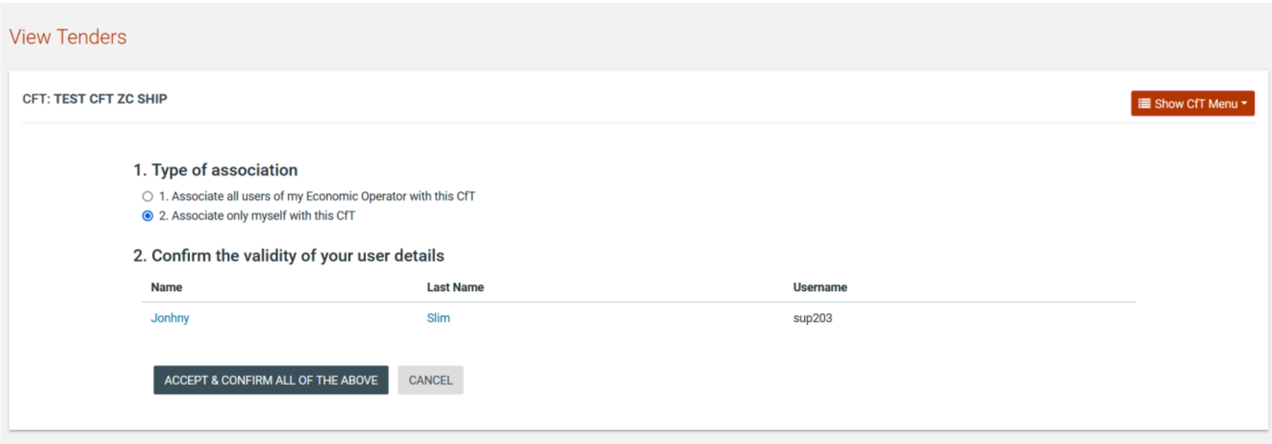


Figure 100: Accept & confirm user details

Next, the main Tender Preparation webpage loads. Upon first access to this page for this Call for tender the page is empty and shows no particular record. If this page was previously accessed as part of a submission relating to this Call for tender, it will show the submitted tender or the draft tender that the user has already prepared.

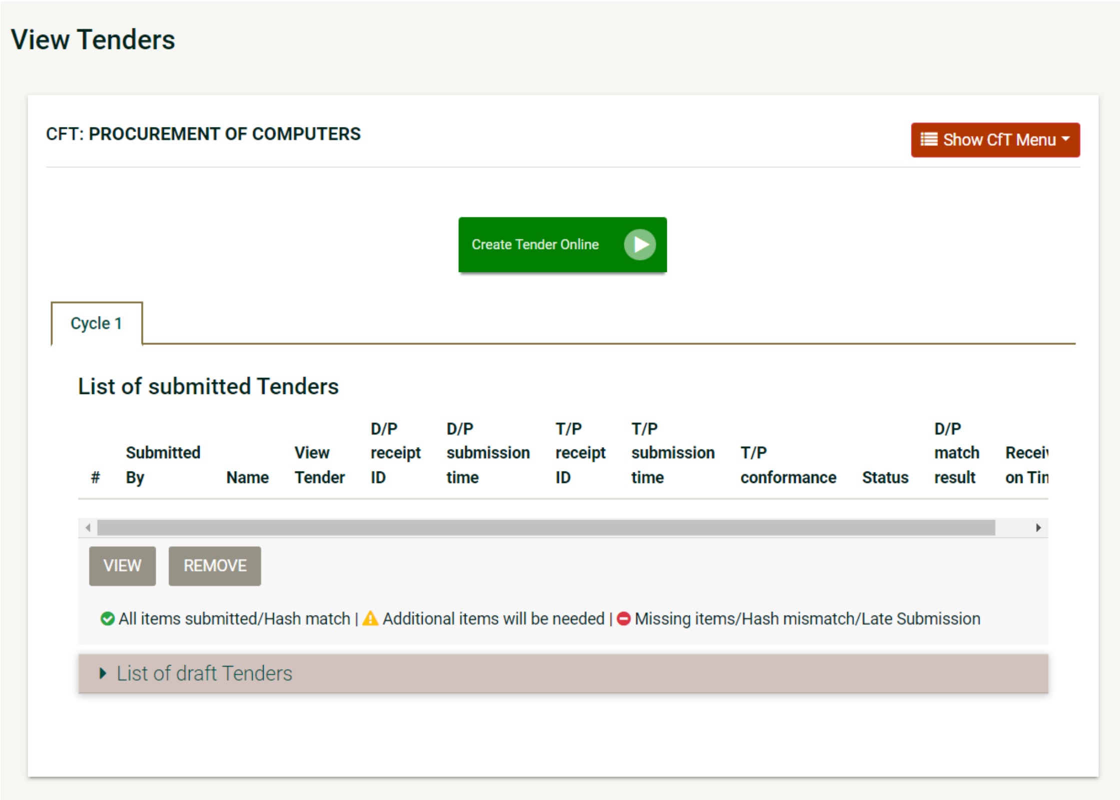


Figure 101: Main Tender Preparation webpage

The user should click on the “Create your Tender online” button in order for the WebTPT application to launch the online Tender Preparation Tool. This tool guides the supplier during the tender preparation and response process and is the place where the tender data is assembled (responses to relevant questions, upload of files, etc.).

6.1 WebTPT

In this section we will describe how to prepare the response to a tender using the web based Tender Preparation tool (webTPT). This part of the response outlines the number of envelopes relevant to the particular tender and will depend on the type of procurement and the submission phase for the tender in question.

6.1.1 Create a tender response

Return to Quick Guide

User should click on the “Create your Tender online” button.

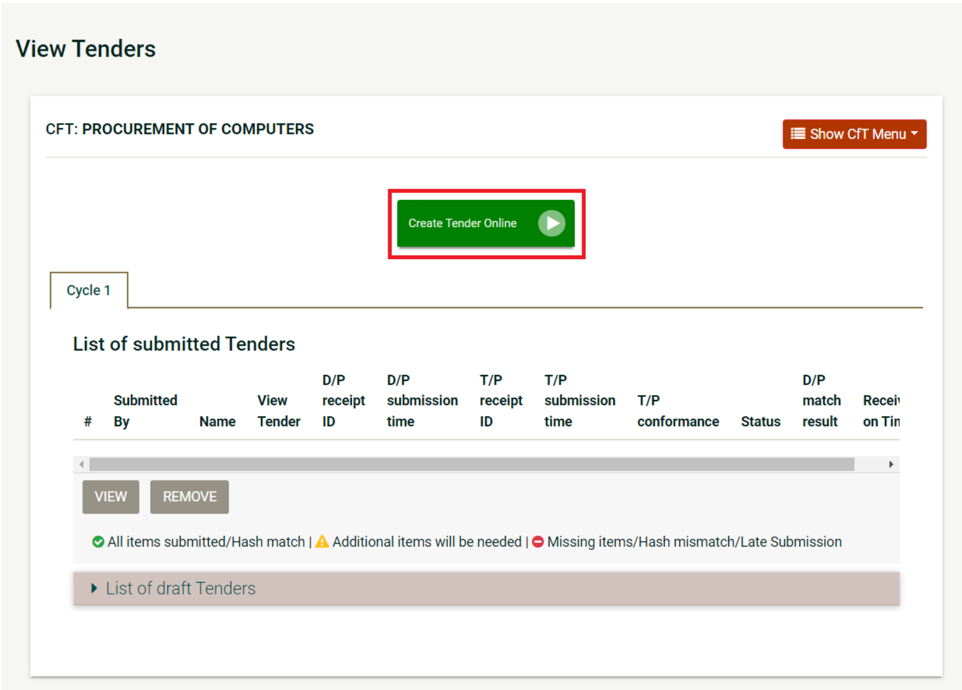


Figure 102: Click on the “Create your tender online” option

- Provide a meaningful title that describes your response (e.g. the RFT ID and your supplier organisation name) and then click on the “Save” button to proceed

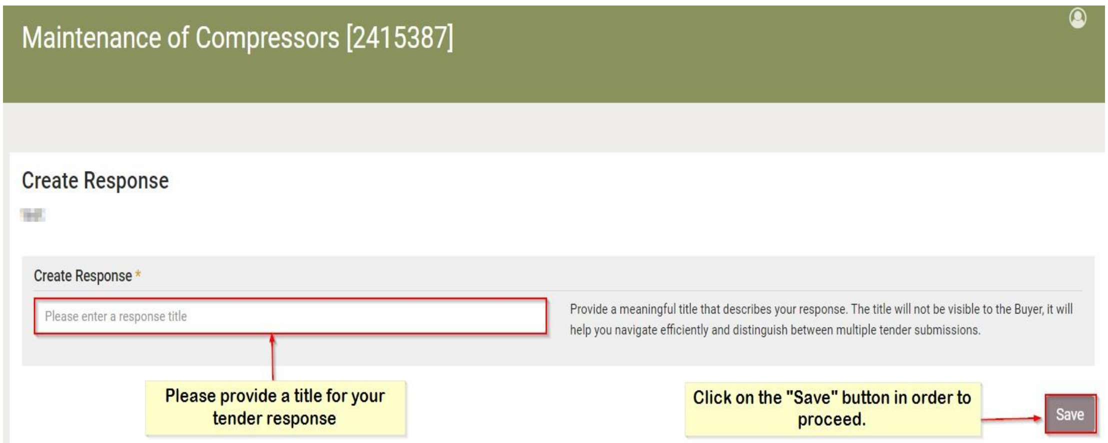


Figure 103: Main page of the WEPTPT application

6.1.2 Preparing the tender response

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

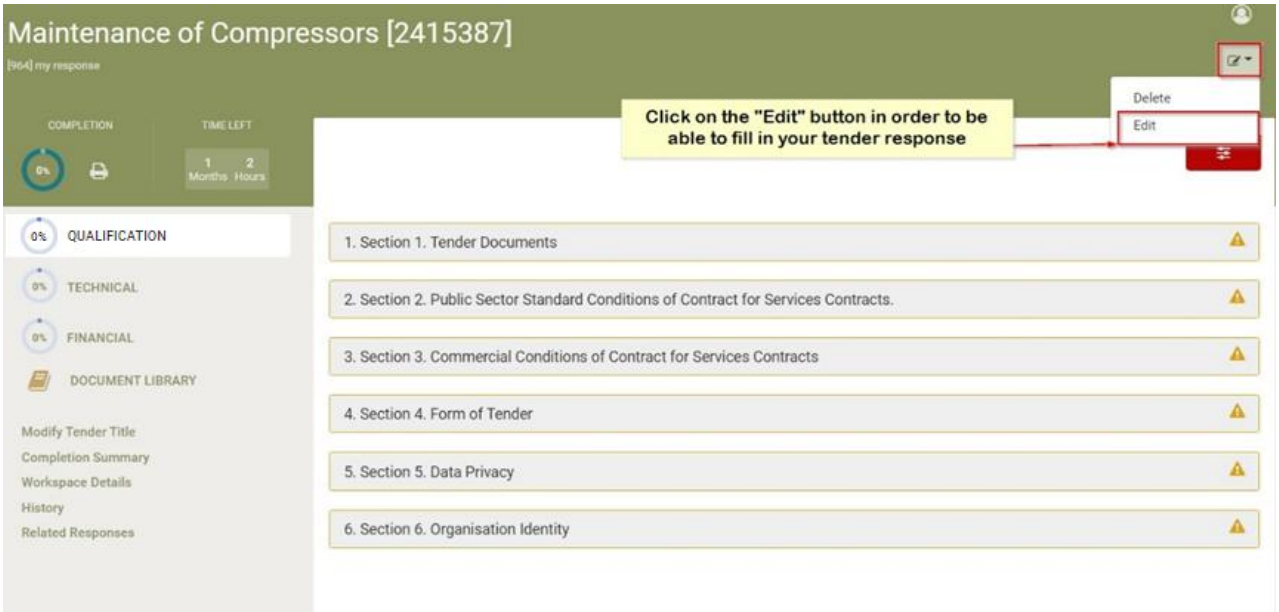


Figure 104: Preparing a tender response

<u>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 will not be in position to start preparing your tender response. Later on, when returning to your draft tender, using this button, you can either “edit” or simply “view” it (in read only manner).</u>

6.1.3 Navigating the tender response envelope structure

In this section we will describe how to prepare the response to a tender. This part of the response outlines the number of envelopes relevant to the particular tender and will depend on the type of procurement and the submission phase for the tender in question.

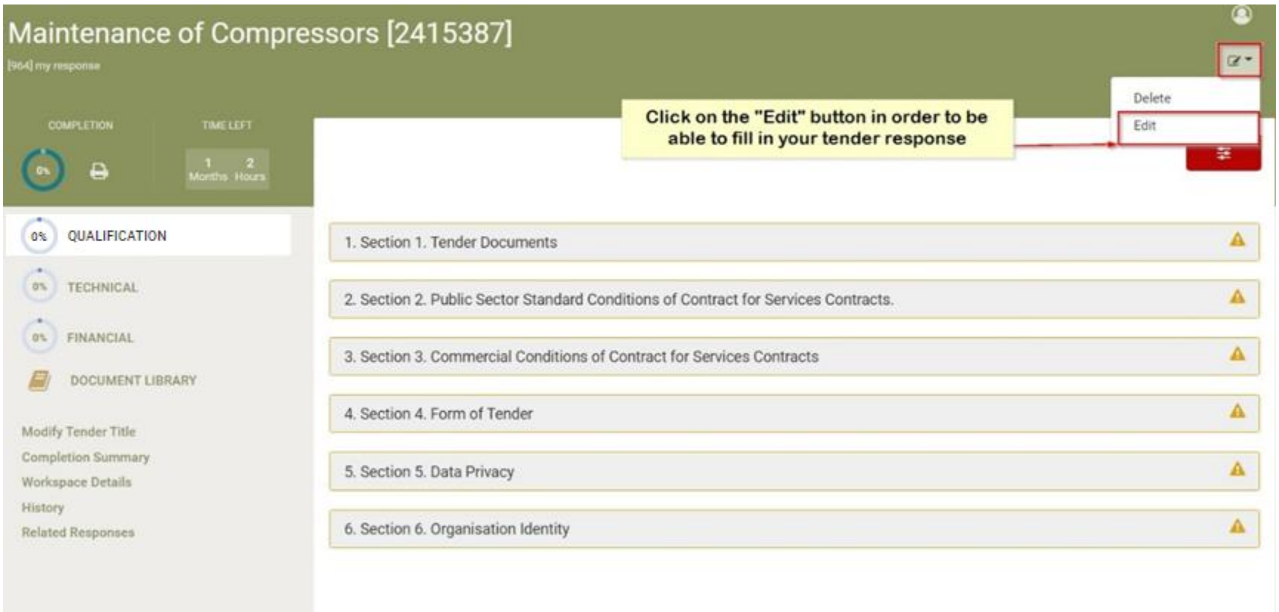


Figure 105: Start of preparing a tender response

- The left panel of the WebTPT displays all the envelopes contained in the call for tender (e.g. Eligibility, Technical and Financial Envelopes; Eligibility Criteria only for PQQ stage; Technical and Financial Criteria for ITT stage).
- The right panel of the WebTPT displays the requirements of the selected envelopes (i.e. sections, subsections and criteria in each of these envelopes).

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

6.2 Complete the Qualification and the Technical Envelopes

- Click on an envelope (e.g. “Qualification”) to view the corresponding sections

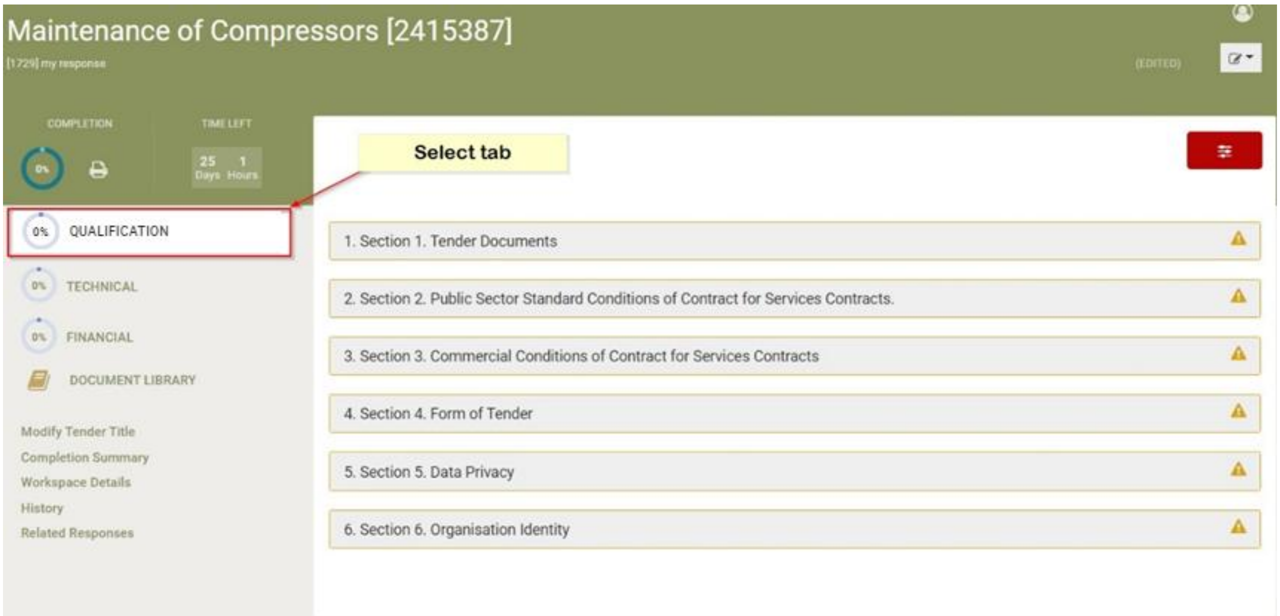


Figure 106: Qualification envelope population

- Green ticks will appear when all Mandatory Questions in a section have been answered (you need to click outside the box or field that you are answering in to get a green tick). Bidders should try to answer ALL questions in a tender, even if not all questions are mandatory. Check each question individually before submitting your tender response in order to ensure that ALL questions have been answered. In case of doubts on the questions to be answered please consult the supporting tender documentation available for the Call for tender and / or use the messaging functionality in order to make questions to the tender coordinator.

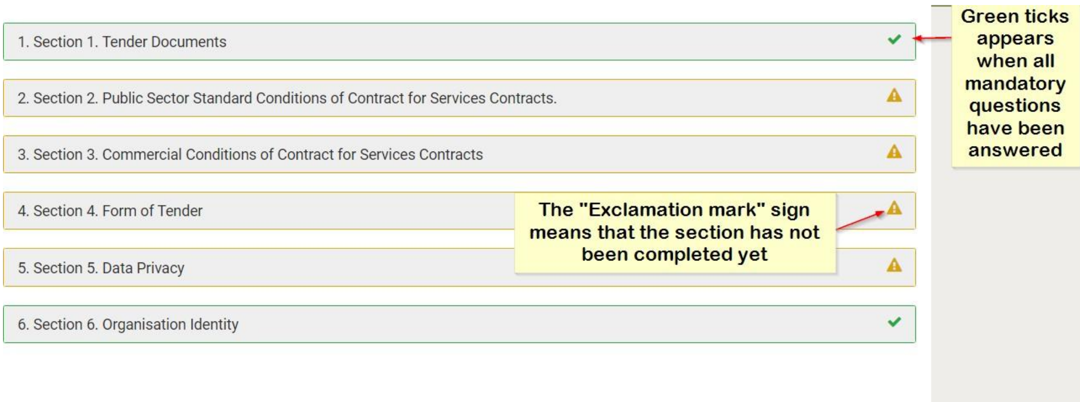


Figure 107: Completion process indication

IMPORTANT NOTE:

Please note that it is possible to save a partially completed tender response and to return to it at a later stage, in order to complete it – details for accessing draft tender are provided later in this document.

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

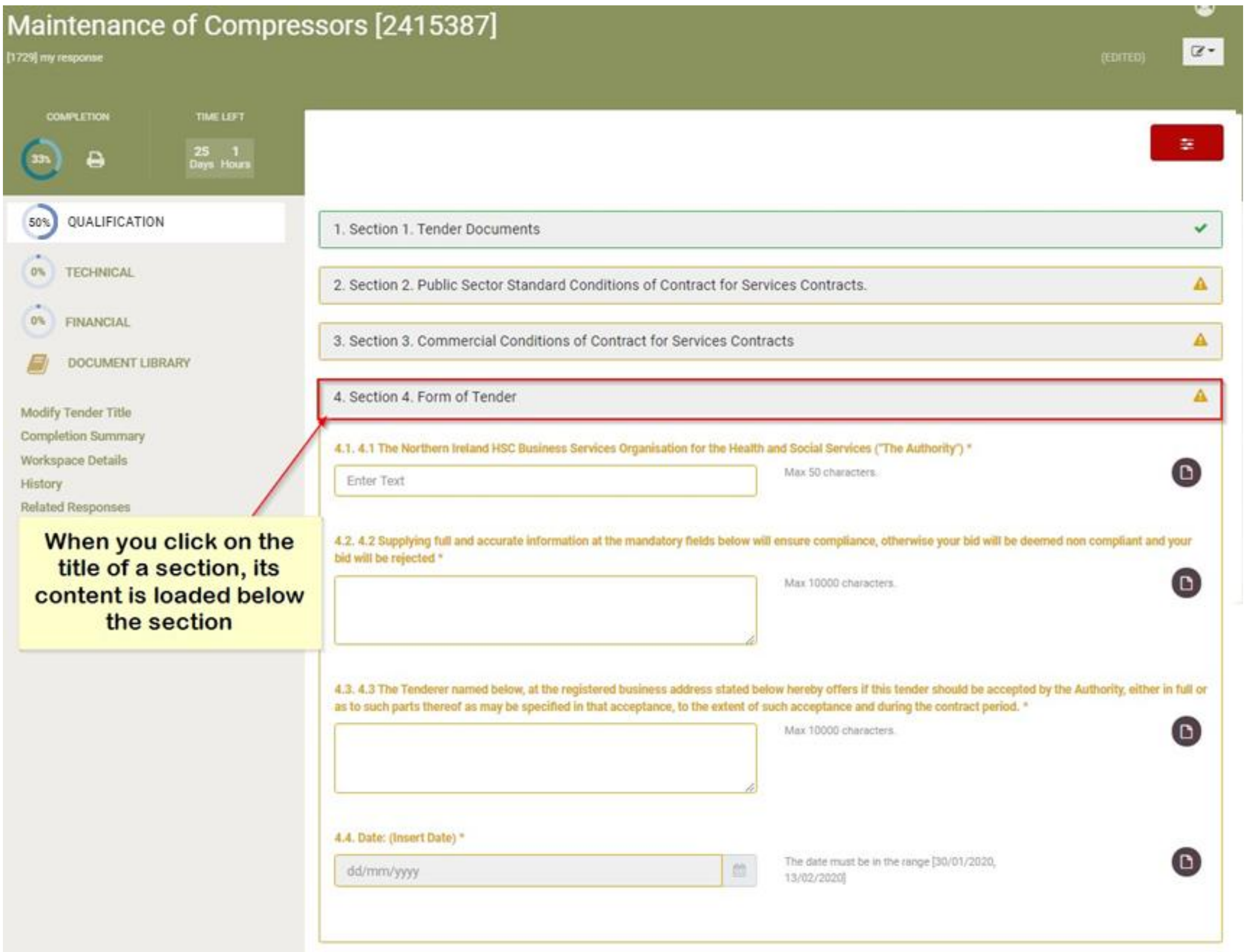


Figure 108: Access a section in Qualification

- Please note that mandatory questions are indicated with an asterisk (*). User should make sure that information for these have been provided.

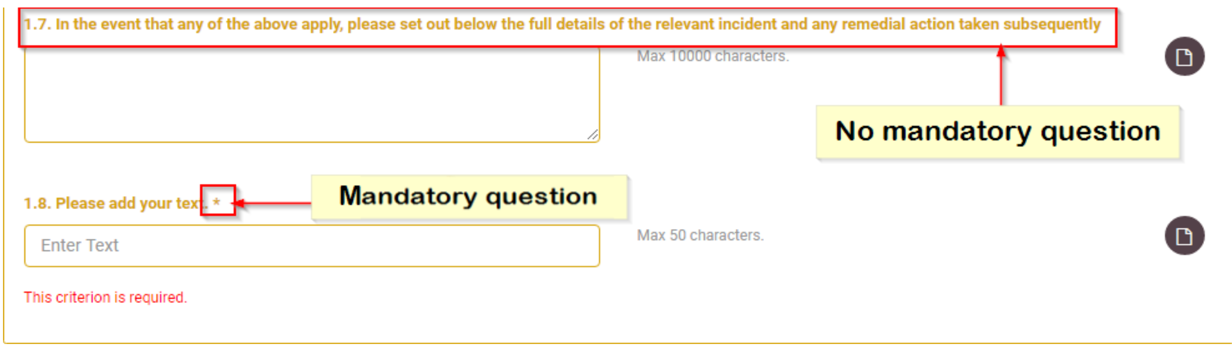


Figure 109: Mandatory indication

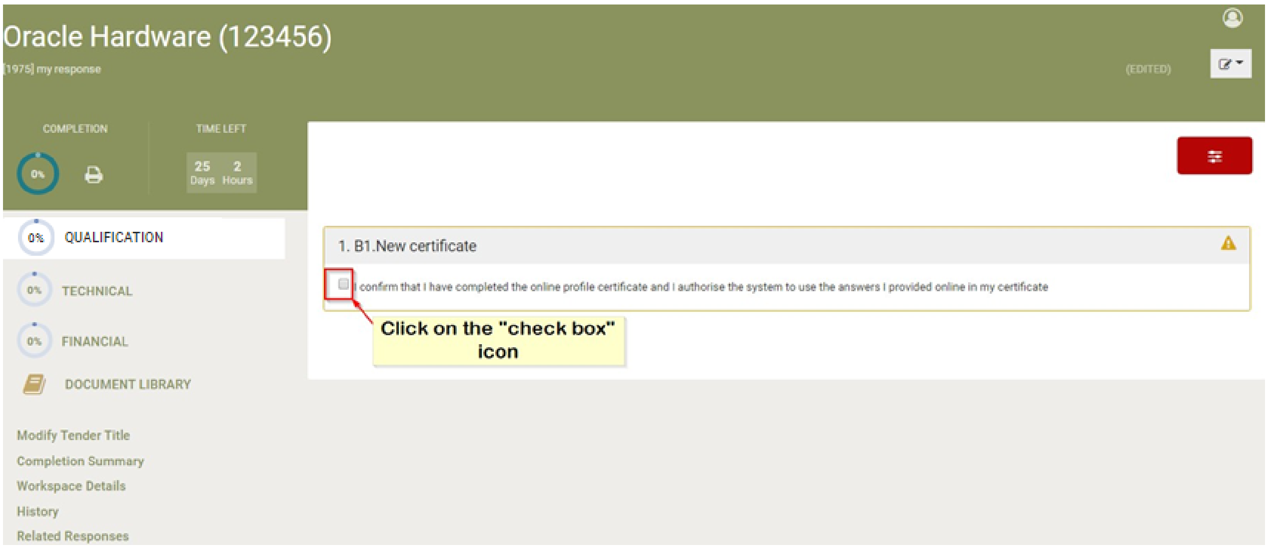


Figure 110: Completing a certificate

<u>IMPORTANT NOTE</u>:

<u>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 > eAttestations > Valid* page.</u>

6.2.1 Types of criteria

Please note that tender questions may allow for different type of responses (list, text field, text area, number, etc.). The format of the questionnaire and the expected response for each criteria have been configured by the Procurement Officer. Certain questions may require selecting a "Yes" / "No" answer, others may require selecting a date using calendar functionality or simply providing a text input.

6.2.2 Text criterion

For the criteria of this type, the Economic Operator will provide their 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 111: WebTPT - Text criterion

6.2.3 Number Criterion

For the criteria of this type, the Economic Operator will provide their 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 their answer.

Figure 112: WebTPT - Number criterion

6.2.4 Text area Criterion

For the criteria of this type, the Economic Operator will provide their 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 their answer.

Figure 113: WebTPT - Text area criterion

6.2.5 List option criterion

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

Figure 114: WebTPT - List option criterion

6.2.6 Multiple selection list (checkboxes) criterion

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

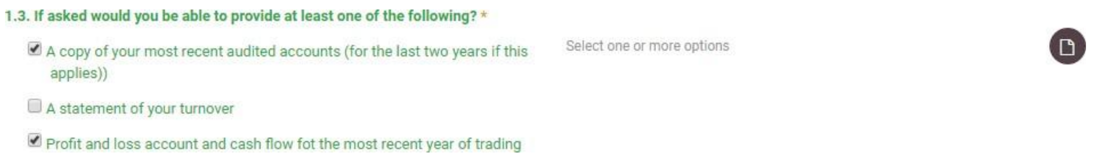


Figure 115: WebTPT - Multiple selection list (checkboxes) criterion

6.2.7 Date criterion

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

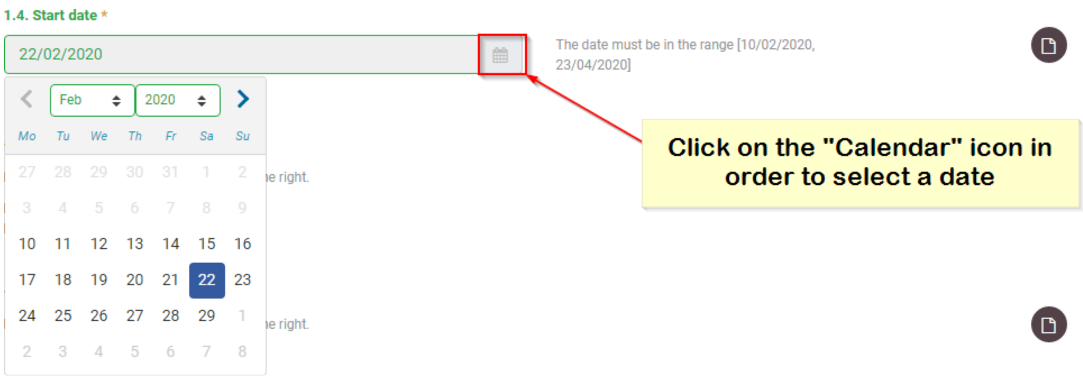


Figure 116: WebTPT - Date criterion

6.2.8 File criterion – Uploading file attachments

In a file 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 117: WebTPT - Attach a file

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

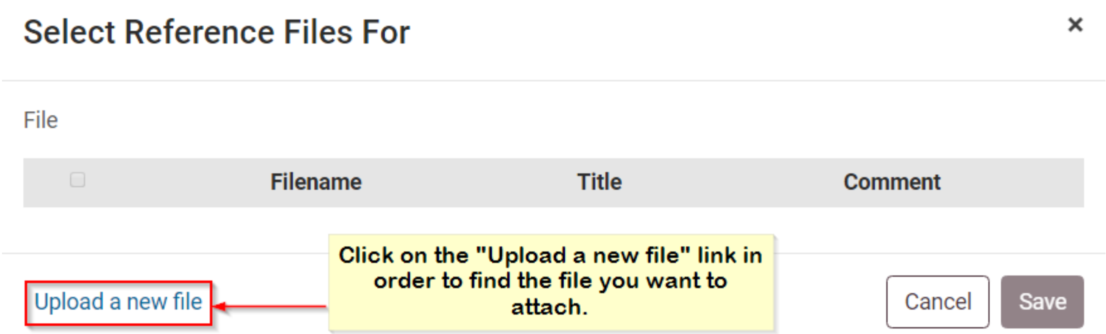


Figure 118: WebTPT - Upload a new file process

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

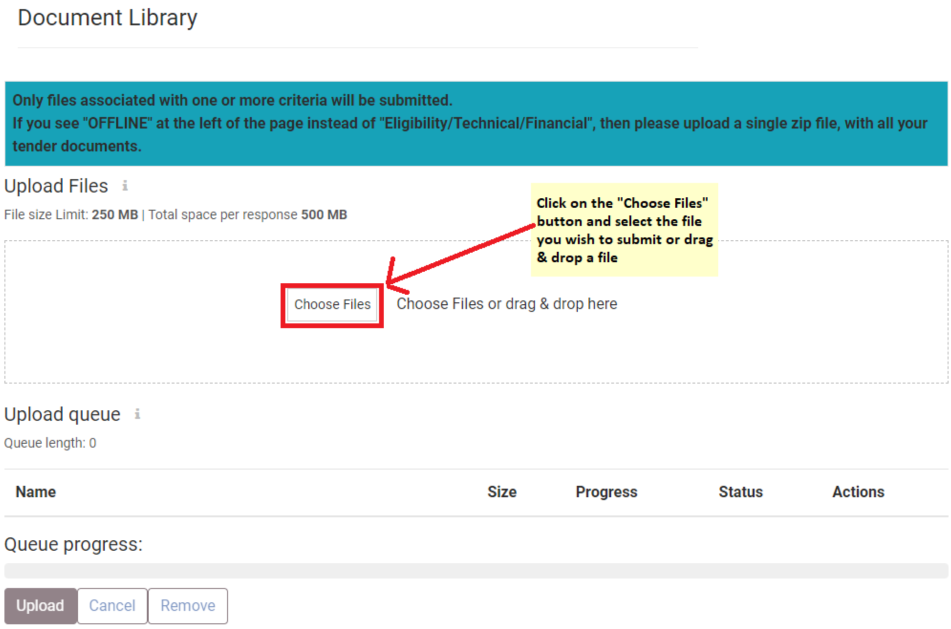


Figure 119: WebTPT - Upload a new file process 2

➢ Select the necessary file(s)

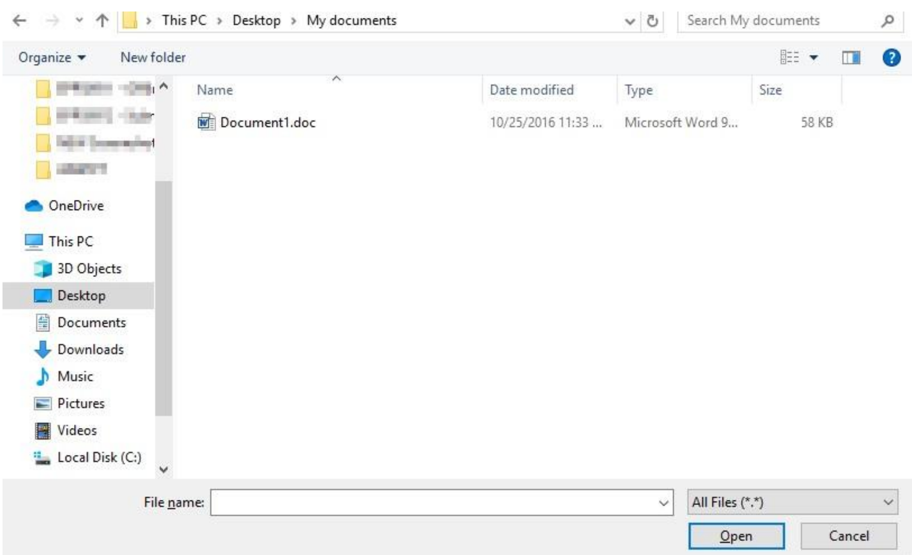


Figure 120: WebTPT - Select a new file from the file system

➢ Click on the “Upload” button in order to upload your file(s) on the WEBTPT application.

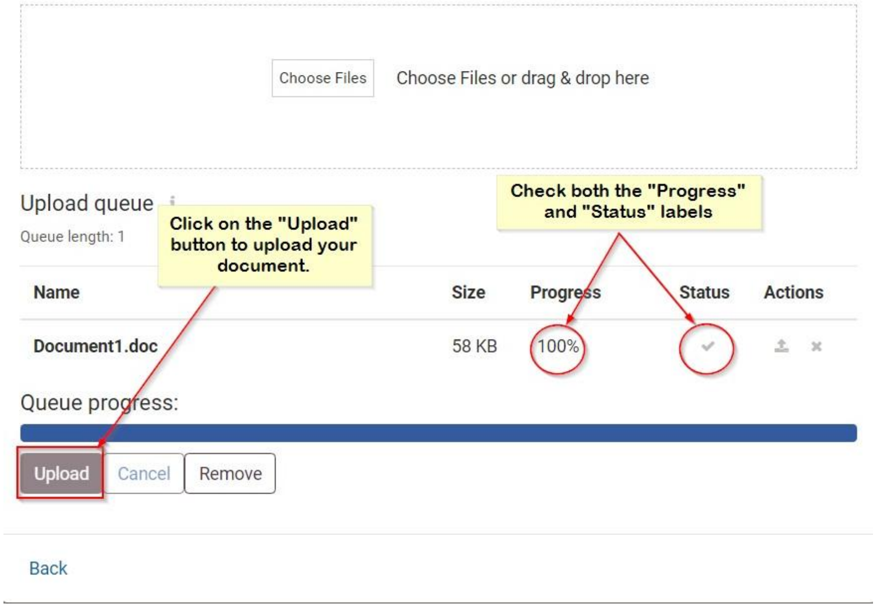


Figure 121: WebTPT - Upload a new file process 3

➢ Select the referenced file(s) for the particular criterion. Please note that more than one files can be associated with a particular criterion.

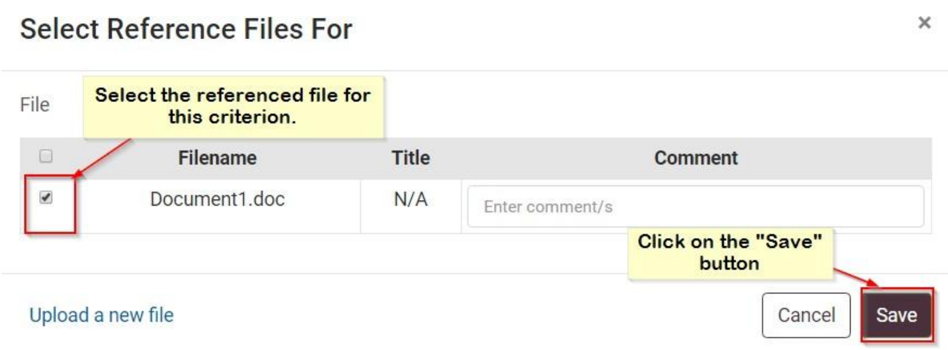


Figure 122: WebTPT - Associate file(s) to a particular criterion

<u>IMPORTANT NOTE</u>:

<u>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.</u>

6.2.9 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. Please note that more than one files can be associated with a particular criterion.

Figure 123: WebTPT - Optional file attachment

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

6.2.10 Supplier Read Only Criteria

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

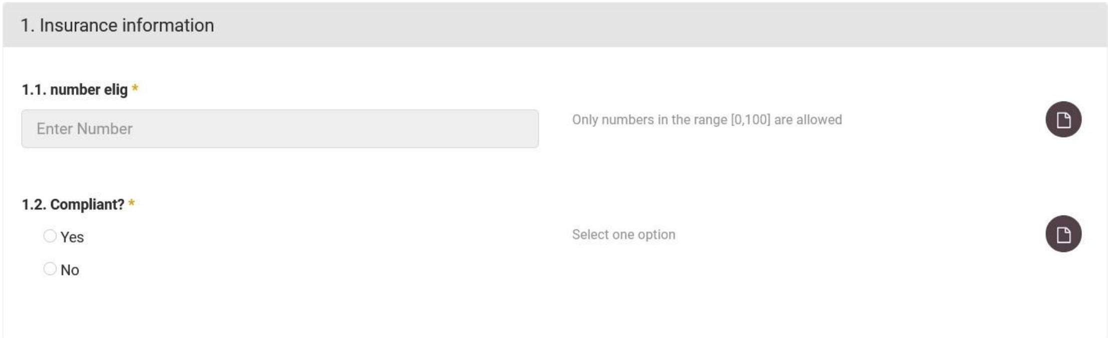


Figure 124: WebTPT - Supplier Read Only Criterion

6.2.11 Complete the Financial Envelope

After you have completed the Qualification 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**”. The “**Totals**” are automatically calculated by the system, as the sum of all prices provided for all prices criteria.

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

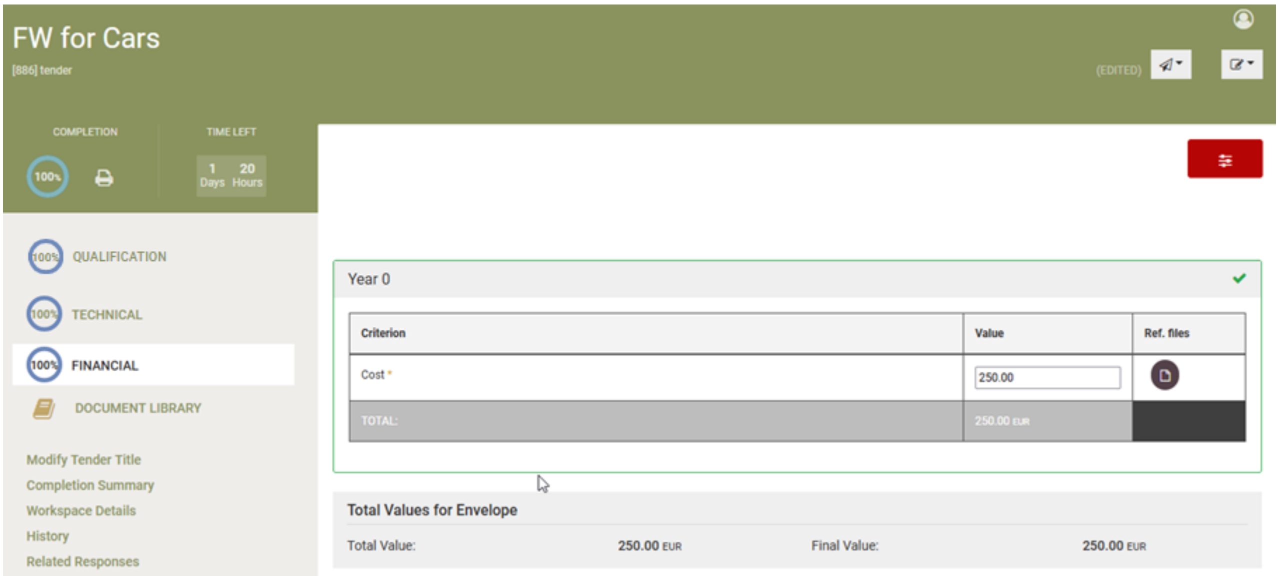


Figure 125: WebTPT - Complete financial envelope

Regarding the TCO (BoQ), 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 - BoQ Attribute: Quantity), and the price per unit (TCO - BoQ Attribute: Unit Price). The coordinators have setup calculation formulas that in the background provide them with the proposed financial values.

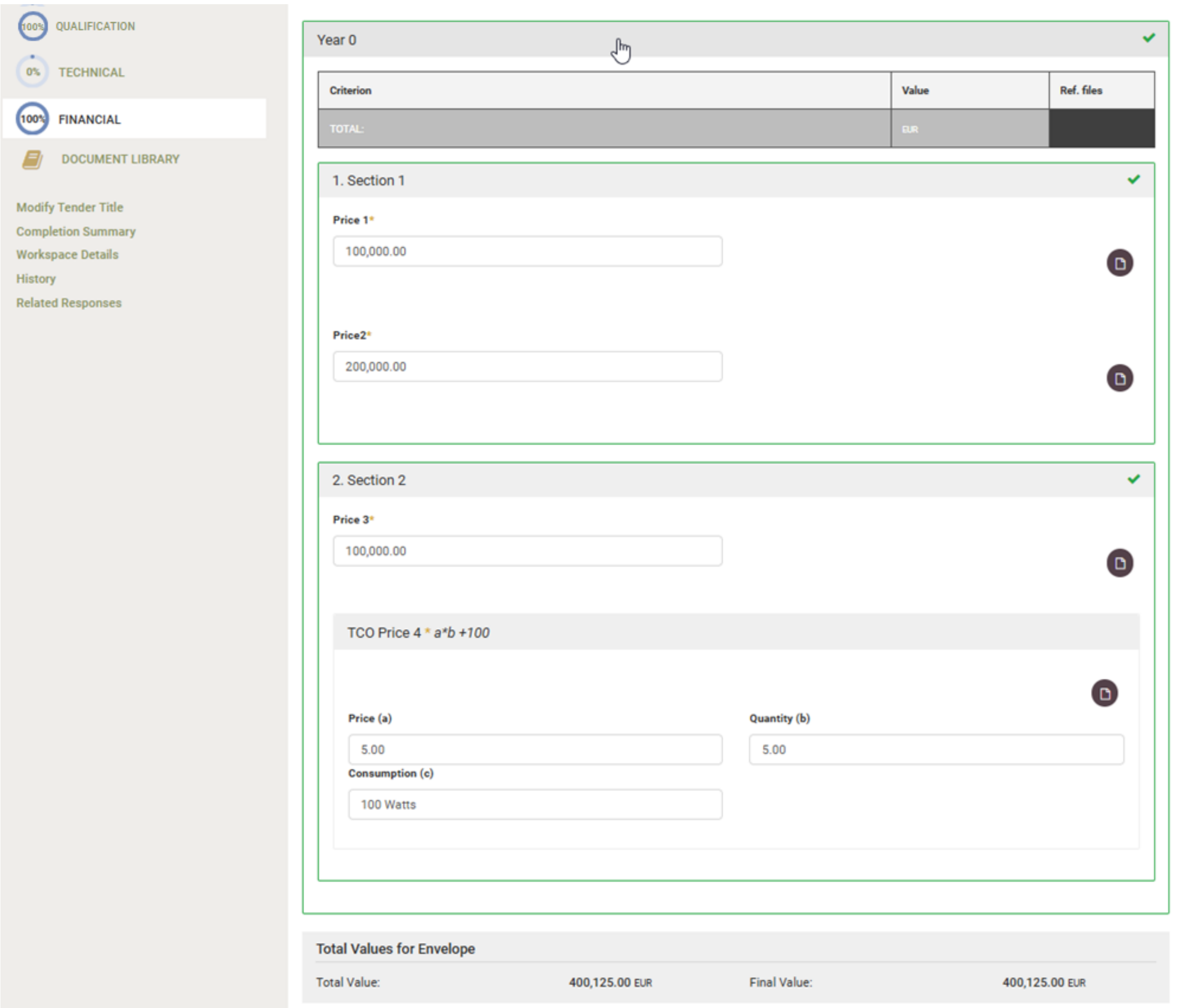


Figure 126: WebTPT – TCO criterion

6.2.12 Validate tender response

Return to Quick Guide

The progress indicators visualise the incremental progress of each tab within the response, as well as the progress of the tender response in total

Figure 127: WebTPT -Progress Indicators

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

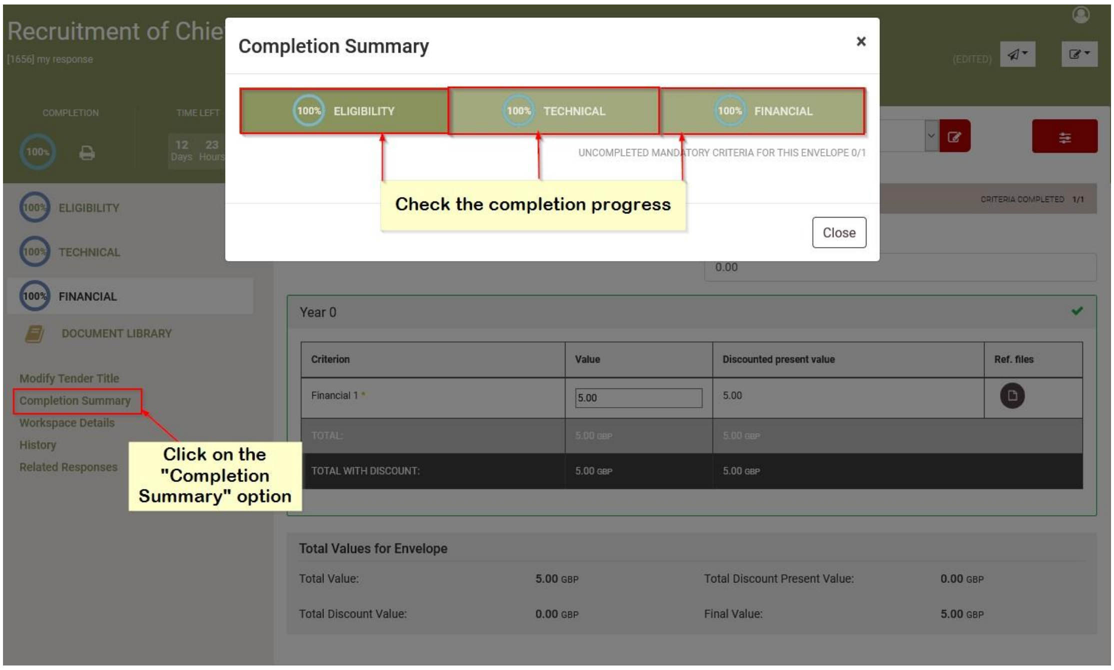


Figure 128: WebTPT -Completion summary

6.2.13 Saving a tender response

At any time, you may save a partially completed tender and return to it at a later stage in order to finalise it and complete your submission.

In the WEBTPT application, your provided values are saved automatically every time you perform an action on the application (e.g. clicking outside of the field).

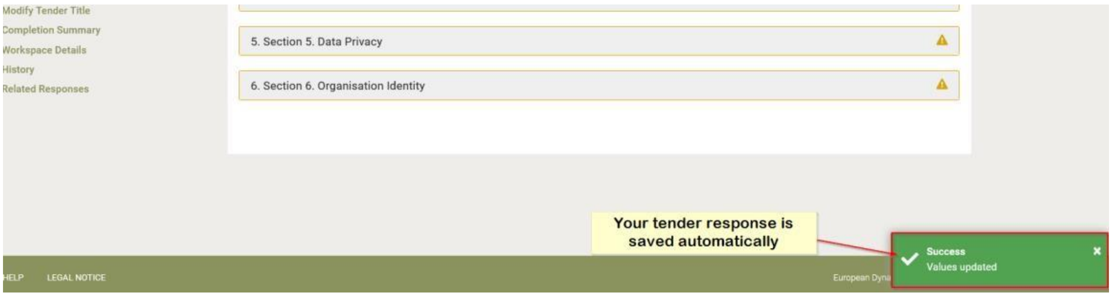


Figure 129: WebTPT - Automated saving process

All saved draft versions are saved on eTendersNI servers. However please note that in conformance with the EU Public Procurement Legislation and eTendersNI policy, 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). Naturally these files become accessible to the Contracting Authority after the opening of the tender box.

6.2.14 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".

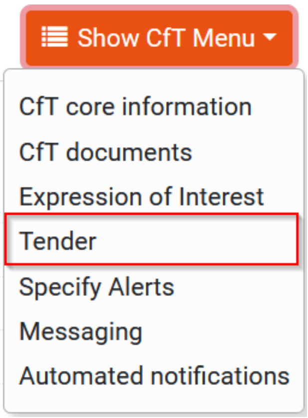


Figure 130: WebTPT - Access a draft tender response

- Select the saved tender response from the list of draft tenders. Click on the radio button next to the desired draft and click edit to proceed.

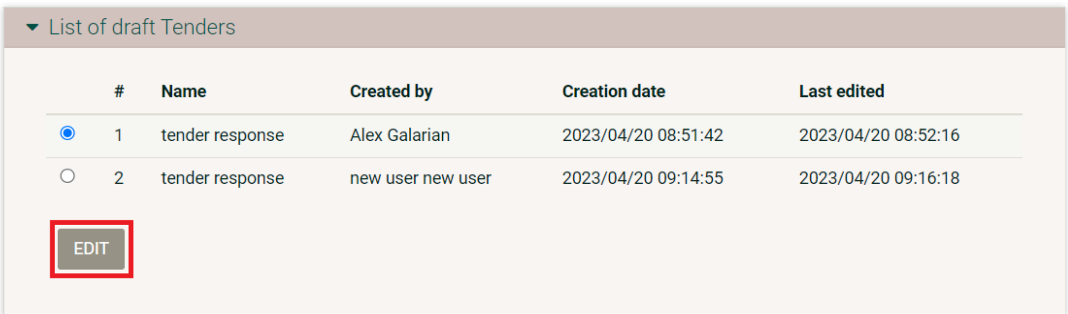


Figure 131: WebTPT - List of draft tenders (created online)

Please note that in case a second user (from a same organisation) needs for some reason to access a draft tender response prepared by another user (tender creator), he should locate the draft tender and select to "edit" it with the WEBTPT. As described in the above they can access the Tender Response Page, select the appropriate tender and edit it from there.

6.2.15 Submitting a tender response

Once the user has responded to all the required questions **(100% complete)**, they can submit their response on the eTendersNI platform by clicking on paper plane first then on the **“Submit”** icon.

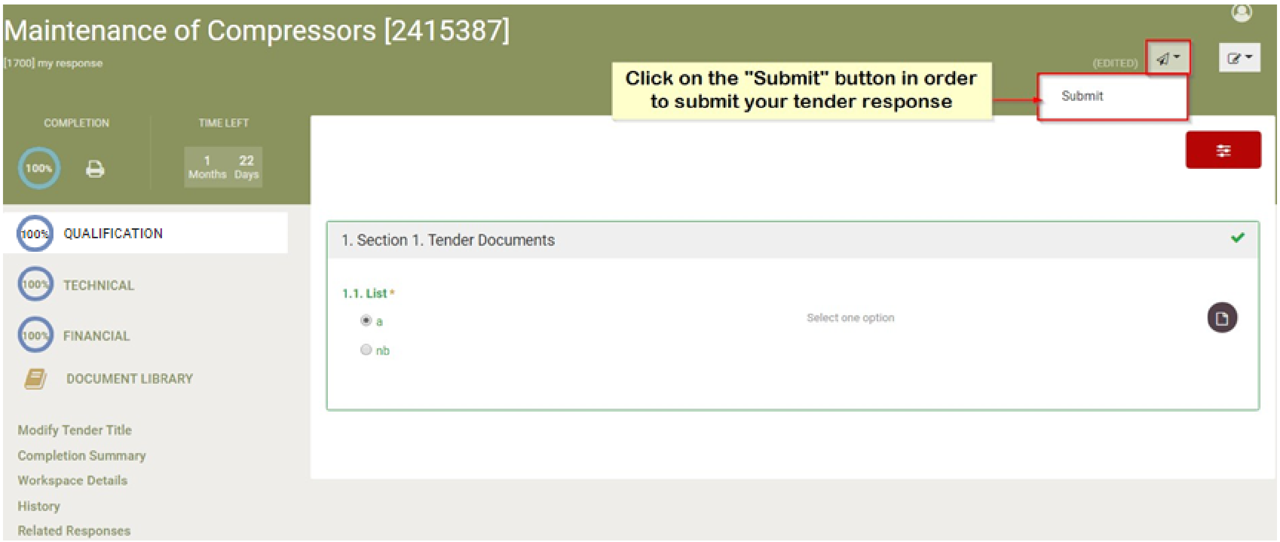
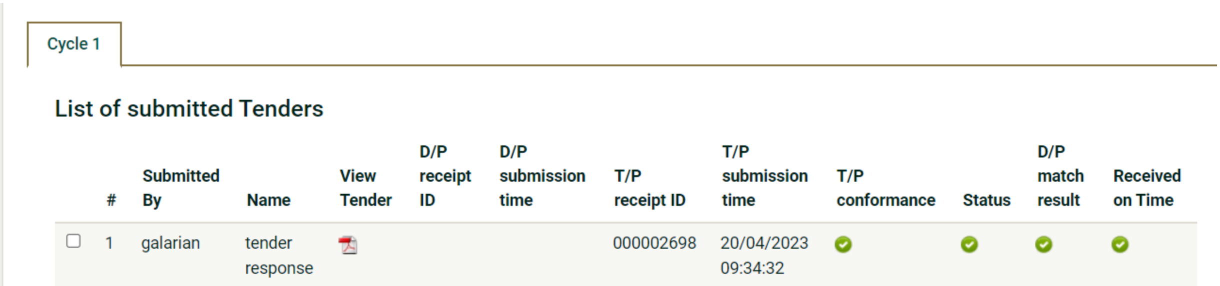


Figure 132: WebTPT - Submit a tender response

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

	#	Submitted By	Name	View Tender	D/P receipt ID	D/P submission time	T/P receipt ID	T/P submission time	T/P conformance	Status	D/P match result	Received on Time
☐	1	galarian	tender response				000002698	20/04/2023 09:34:32	✔	✔	✔	✔

Figure 133: WebTPT - List of submitted tenders

In addition, upon successful submission an email notification is dispatched to your email address. Please note that the email notification **simply acknowledges the receipt of the file** you submitted on the eTendersNI platform 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 documentation associated with the tender response is uploaded successfully so it is important to make sure your documentation is correctly uploaded.

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

	#	Submitted By	Name	View Tender	D/P receipt ID	D/P submission time	T/P receipt ID	T/P submission time	T/P conformance	Status	D/P match result	Received on Time
☐	1	galarian	tender response				000002698	20/04/2023 09:34:32	✔	✔	✔	✔

VIEW REMOVE

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

Figure 134: WebTPT - 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 files where required. Should you notice any missing / incorrect information or attachments within your response you must access the Tender Response Page to correct the issues as necessary and resubmit your tender response.

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.

If the tender structure was set for an online evaluation and the tender is in "Tender Submission" phase, the Tender Coordinator (PO/TC user) has the option to modify the tender structure.

During modification the tender submission will be paused until it is again "saved as Final".

In such case where the tender structure is being modified by the Procurement Officer and during the above modification period, the supplier that will try to submit their tender will see the following message: "*The particular Tender Structure for this call for tender is being modified, thus the submission of tenders has paused. You will be able to submit your tender once the new Tender Structure is available. Thank you in advance*".

The supplier that already submitted a tender response will receive two automated notification emails:

1. **When the PO/TC (Tender Coordinator) edits the tender structure:**
   "*Tender submissions are currently Paused*
   The submission of the tenders for CFT entitled XXX has paused. A new Tender Structure will be available soon. The tenders you have already submitted will be considered invalid. You will be able to re- submit your tender once the new Tender Structure is available".

2. **When the PO/TC saves the tender structure as final:**
   "*Tender submissions have now resumed*
   The submission of the tenders for CFT with entitled xxx has resumed. There is a new Tender Structure available. In case you have already submitted a tender, you will have to remove it and then prepare and submit a new one based on the updated Tender Structure".

6.3 Complete CDP Eligibility Section

- Click on an envelope (e.g. "Qualification") to view the corresponding sections and click on the Eligibility section to view its contents

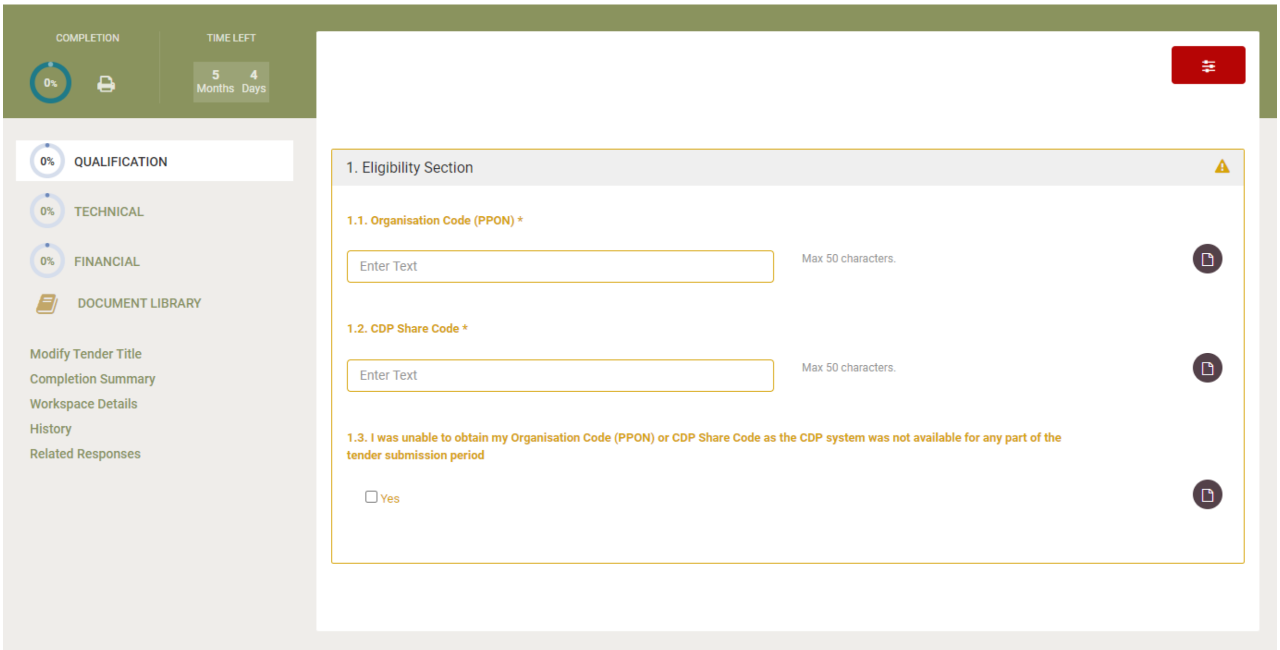


Figure 135 Eligibility Section

The supplier must provide the **PPON** and **CDP Share Code**, which can be obtained from the Central Digital Platform service offered by the Cabinet Office. If the CDP system is unavailable during any part of the tender submission period, the supplier may tick the checkbox stating: "I was unable to obtain my Organisation Code (PPON) or CDP Share Code as the CDP system was not available.".
Supplier may click on the "Attach relevant document" icon to upload a document or file related to the response in a criterion. Please note that more than one files can be associated with a particular criterion.

6.4 Offline

The "Offline" is mentioned in the tender submission area and means that only files are expected to be uploaded as a response to the tender submission. It is offline because the buyer has set up a tender structure to "Offline" (This means that tender submission is not structured with the usual qualification, financial, Technical envelopes).

Upon accessing the Tender creation tool, the first step to take is to make your tender submission editable. To do that you need to click on the rectangular button showing a square and a pencil inside it and from the drop-down menu, select "**Edit**".

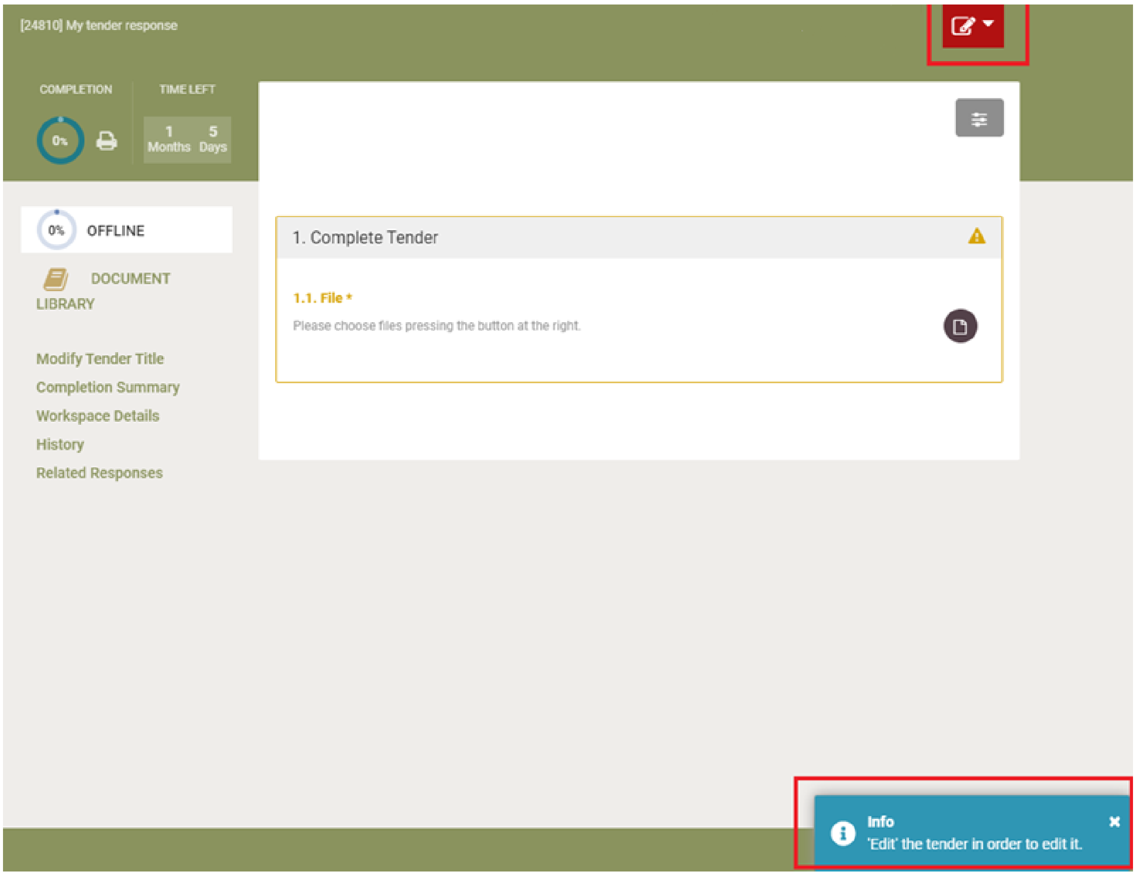


Figure 136 Offline tender submission – Edit

Once you make your submission editable, you can start replying to the criteria set up by the buyer. If you need to upload files as part of your response, you can navigate to the document library and click on "Choose Files". In the next window that opens up you will have to select the files you need to upload in the system and press "Open".

It is strongly advised that you create locally 1 single zip file, which includes all your files, and that you upload this single ZIP file that will form your tender.

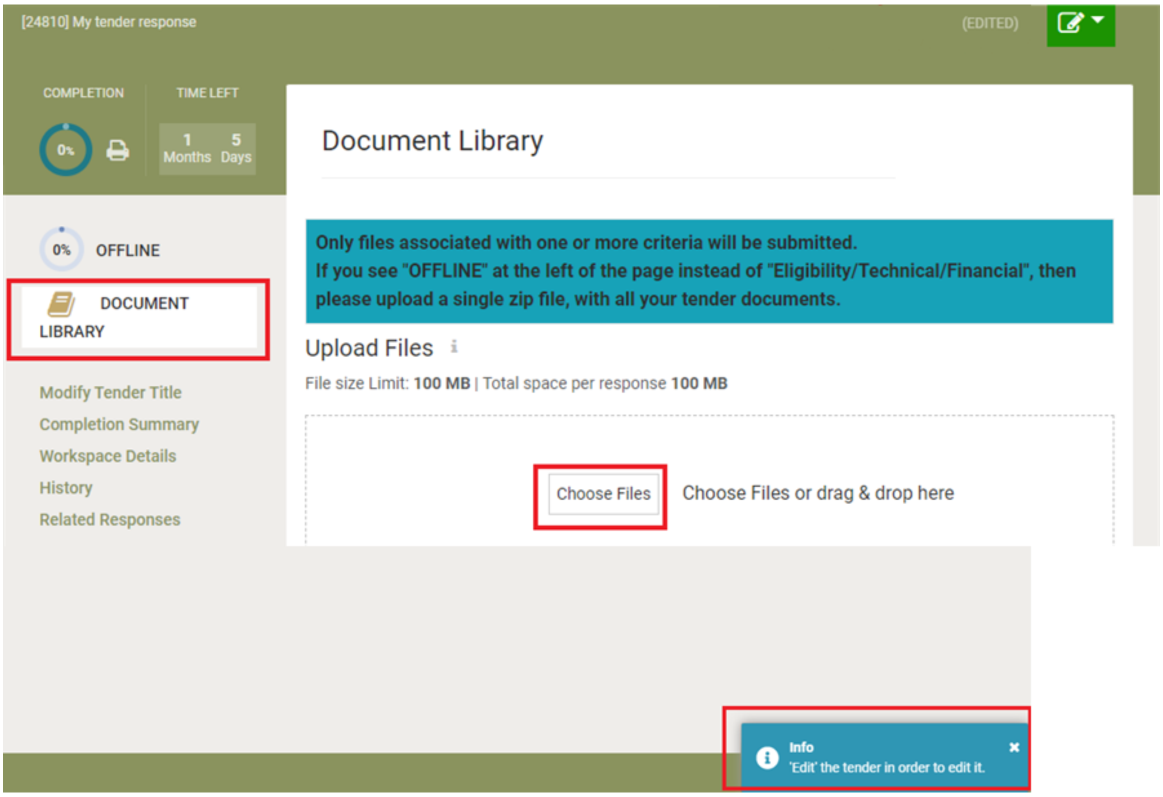


Figure 137 Offline tender submission – Choose files (Document Library)

Then your files will show up in the upload queue and you can upload them by clicking the **Upload** button that you can see below the upload queue.

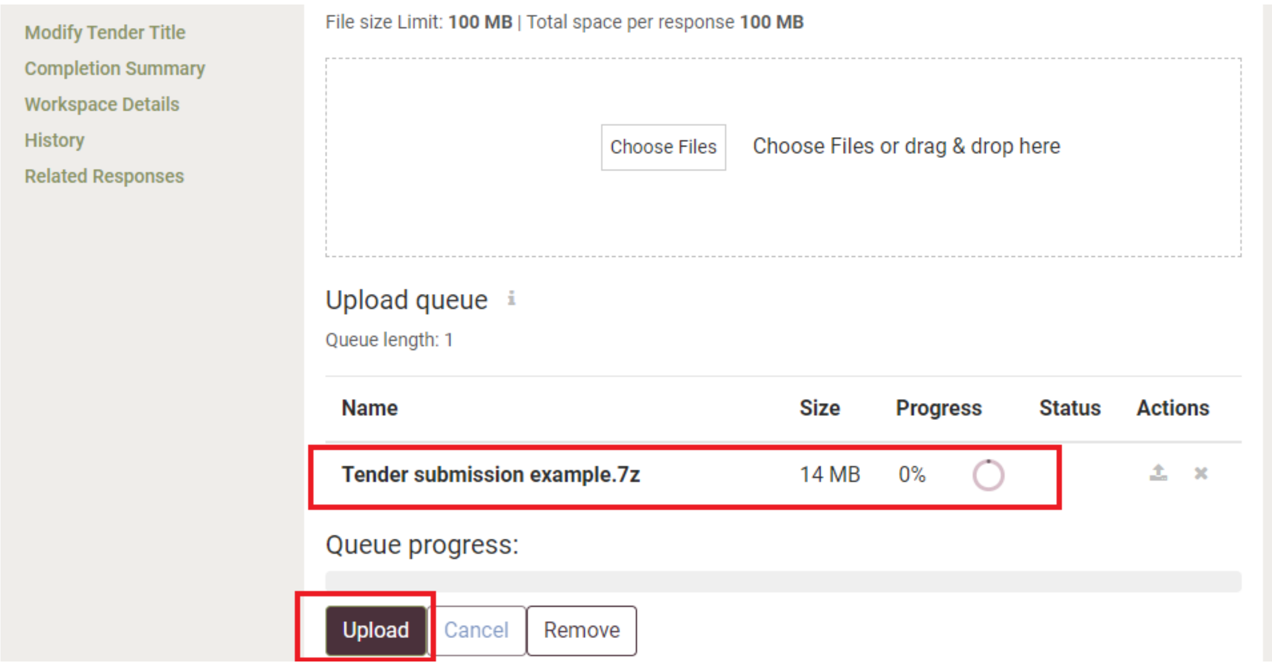


Figure 138 Offline tender submission – Upload document

Your file(s) will be uploaded and the progress meter in the document library will go to 100%.

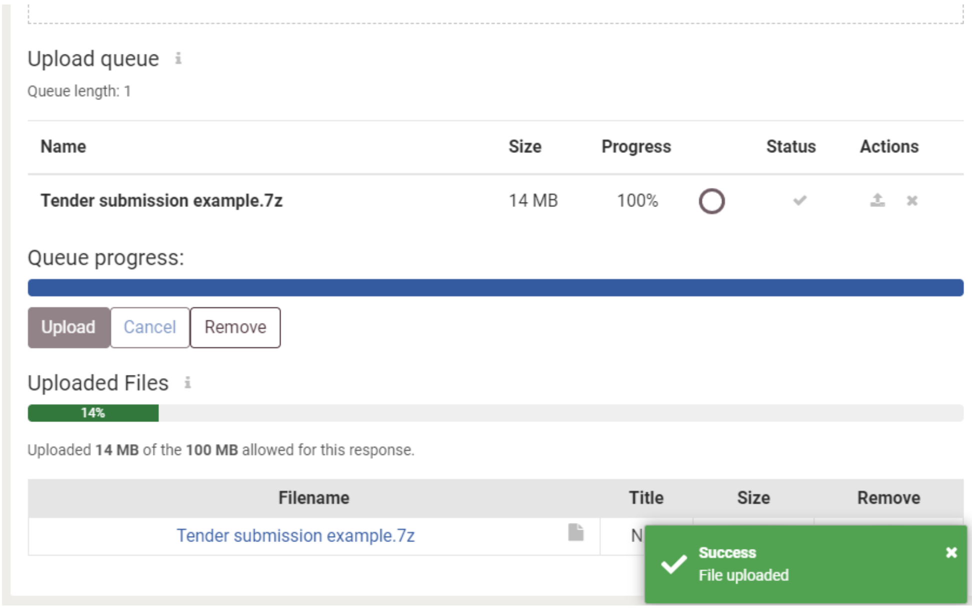


Figure 139 Offline tender submission – Upload document

After your file(s) are uploaded in the document library you will need to associate them to a criterion (File Criterion displayed in the Offline envelope).
You can associate the documents while you are viewing the criteria by clicking on the page icon on the right.

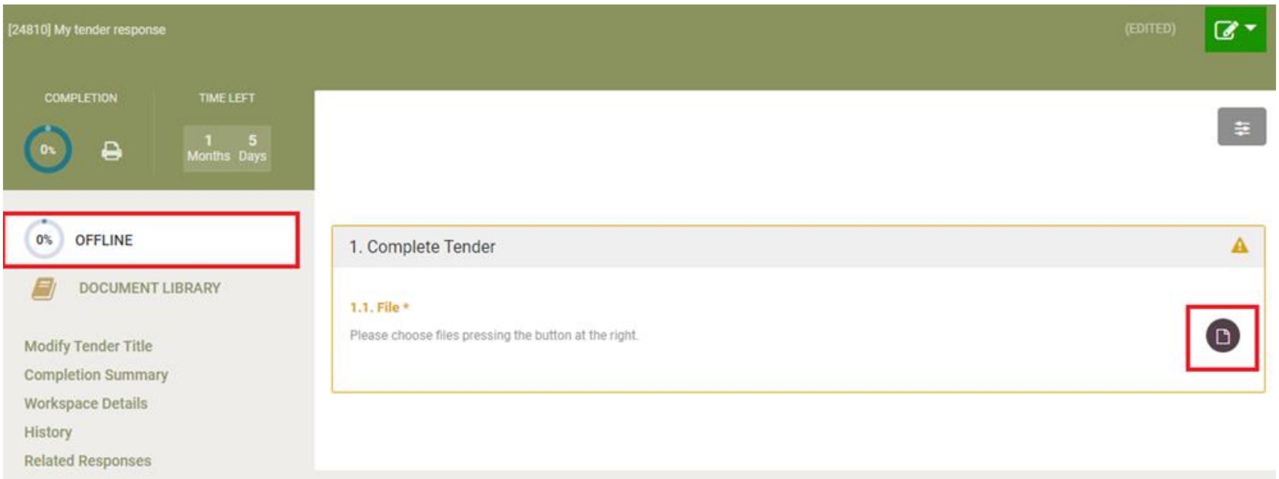


Figure 140 Offline tender submission – Choose files for reference

The list of documents uploaded in the document library will come up and you will need to find the corresponding document in the list, tick the box on the left to select it and then hit Save.

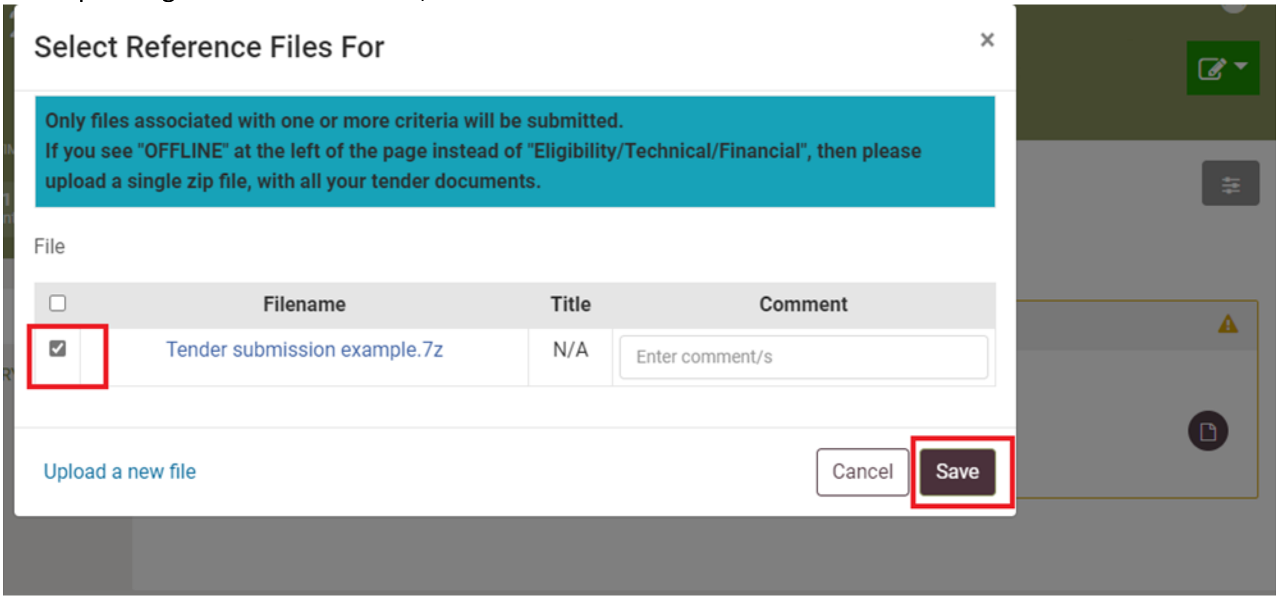


Figure 141 Offline tender submission – Select Reference files

You will notice the little page icon on the right side of the criterion will have turned white and the border will turn green and the completion percentage will change.
At the end of this process please make sure that you do not forget to click on the paper plane icon and then **SUBMIT**.

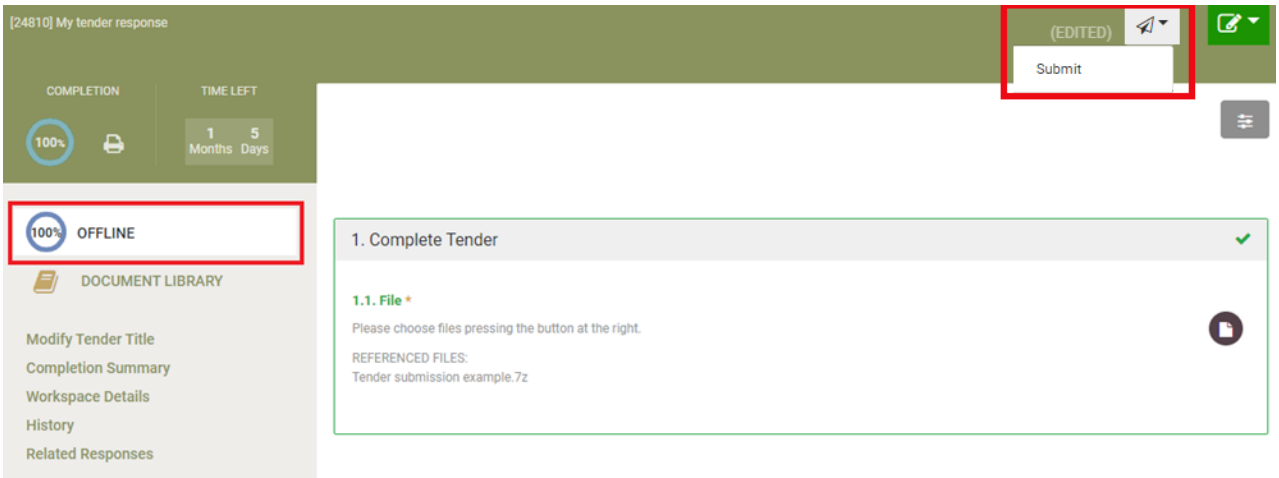


Figure 142 Offline tender submission - Submit

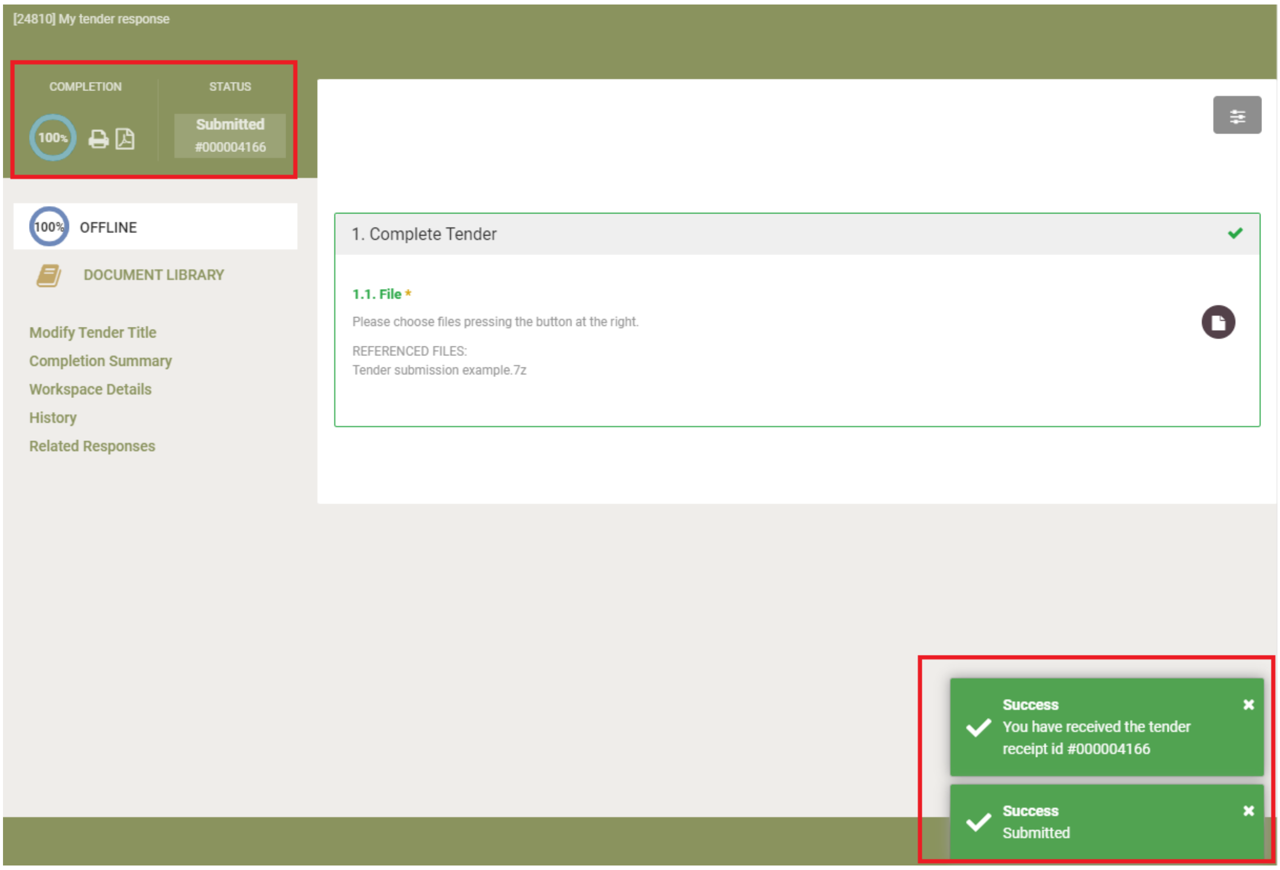


Figure 143 Offline tender submission - completion

6.5 Check my tender response

Return to Quick Guide

After clicking on the **SUBMIT TENDER**, the user can check if they correctly performed their tender submission, if they go to the CfT Workspace and by clicking on the “Show CfT Menu” then on the “Tender” option. In such case, the tender response is presented under the “**List of submitted Tenders**”. In the Tender **Submission Report PDF** file presented below, they can also check if they submitted the right documents (by checking the name of the file submitted for each criteria, etc.) and they can check if there the green ticks are displayed on the right hand side. Also they can check if they received an email notification from eTendersNI after the Tender Submission.

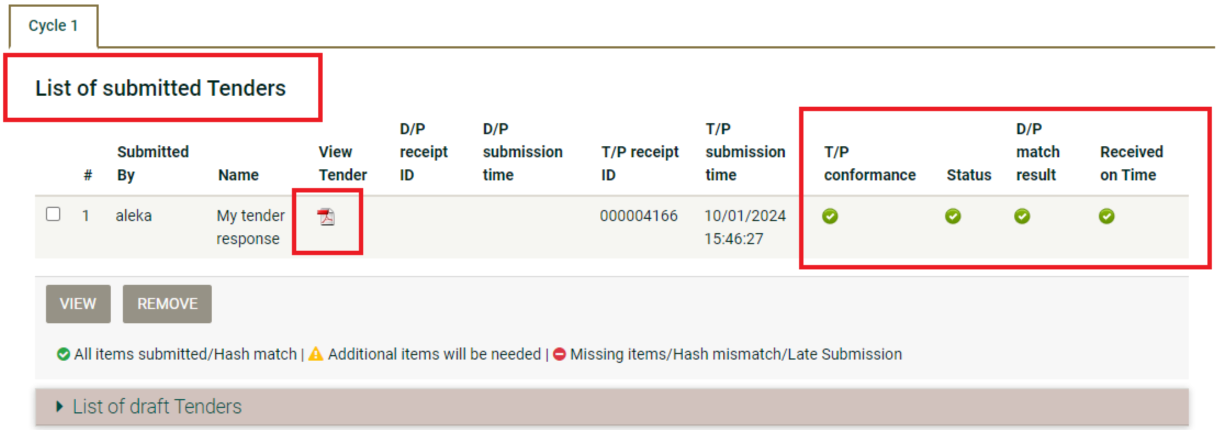


Figure 144 List of submitted Tenders

Tips for your tender submission:

- Start the preparation of your tender well before the Tender submission deadline! In order to avoid any last minute issue.
- Already submitted tenders are not editable. To provide new information or edit the already submitted information. The user should create a new tender submission.
- Certificates should be added under supplier's profile (EO Administration > EO Management > E-Attestations).
- In order to contact the Contracting Authority please click on the CfT's title > Show CfT Menu > Messaging.
- In case you edit the tender with other colleagues one user edits the tender (locked for editing) while the other user can visualise the changes being made.
- **No submission is allowed after the submission deadline!**
- Incomplete Tenders are not accepted!
- In case of issue with system usage contact the Support well before the deadline! (Not last day and last hour).
- When a contract is awarded to your company, you will receive a Task on your landing page to accept the Award.

7 Additional Functionality

7.1 View Contracts

After the Economic Operator has accepted the contract, a new contract workspace is created in the system and the user can access it by clicking on the main menu, on tab “**EO administration**” tab and selecting the “**My Contracts**” label in the dropdown options.

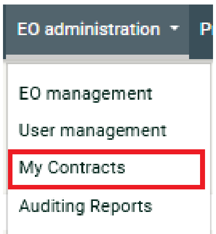


Figure 145: Access “My Contracts”

Alternatively, the contract can be accessed by clicking “**advanced search**” button and selecting **Contracts** and filling some of the respective search fields in order to retrieve the contract record of interest.

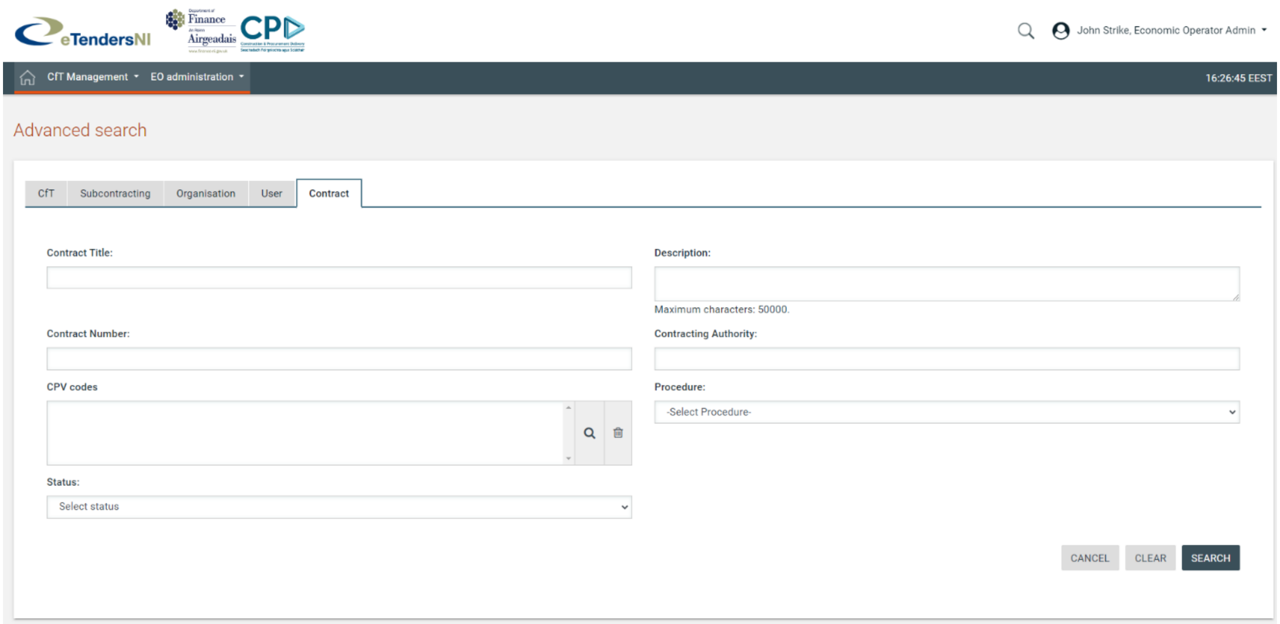


Figure 146: Advanced Search for “Contracts”

The user can access the list of all contracts under their organisation (for which they are granted access) and view the details of every contract. The user is able to see the “**Contract Title**”, the “**Contract Number**” that the system has provided, the “**Contract Expiry date**”, and the “**Contract**

Value” which displays the contract value agreed between the Economic Operator and the Contracting Authority. Finally, the user can access a specific contract document by clicking on the contract title displayed in the following figure.

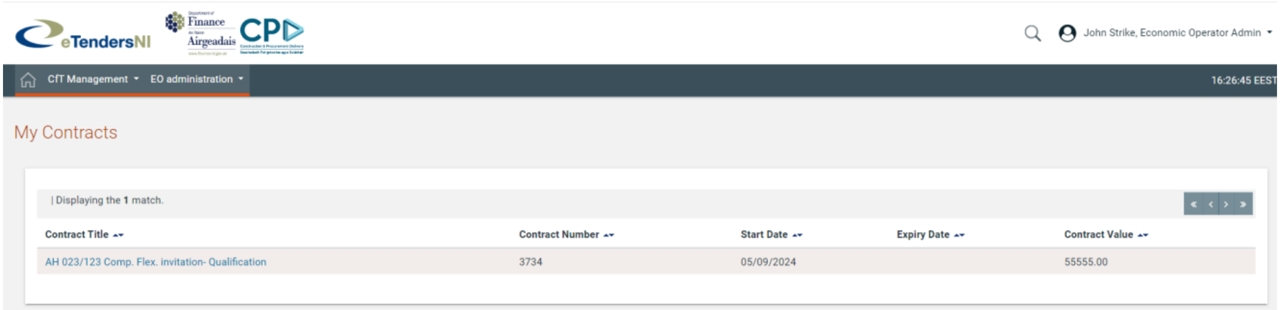


Figure 147: My Contracts List

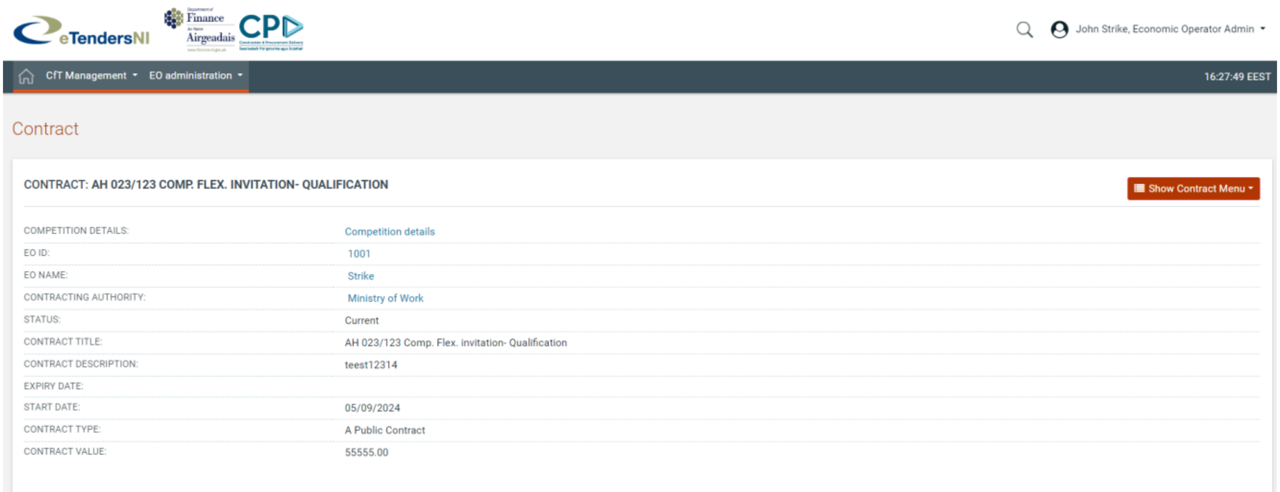


Figure 148: Contract Main page

7.2 Contract Documents

From the main page of the Contract, the user can also access the Contract documents (if any) from the contract menu button on top right corner. This allows the user to download any contract documents for the contracts that the user has access to.

Figure 149: Contract Menu functionality

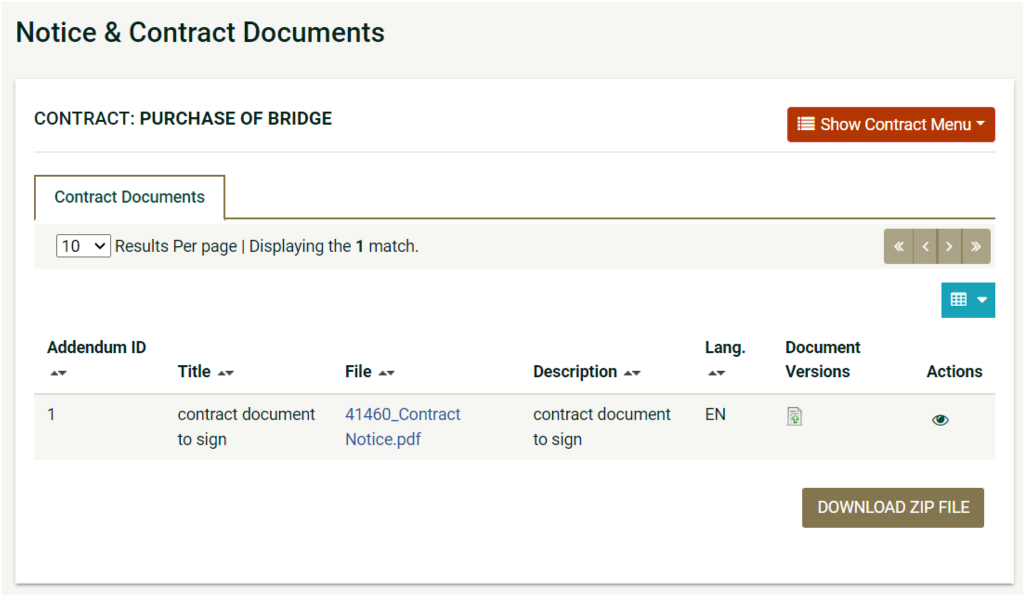


Figure 150: Contract Documents

The user accesses the contract documents, uploaded from contracting authority where the following information columns are displayed:

- Addendum ID: the documents identifier given by the system (starts from 1 on each document).
- Title: the name of the document.
- File: the name of the uploaded file.
- Description: description of the document provided from Contraction Authority.
- Lang: notice of the language of the document.

The user can download all the existed documents with their attachments from the list, by clicking the “DOWNLOAD ZIP FILE” button in the bottom right corner.

7.3 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 151: 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 buttons.

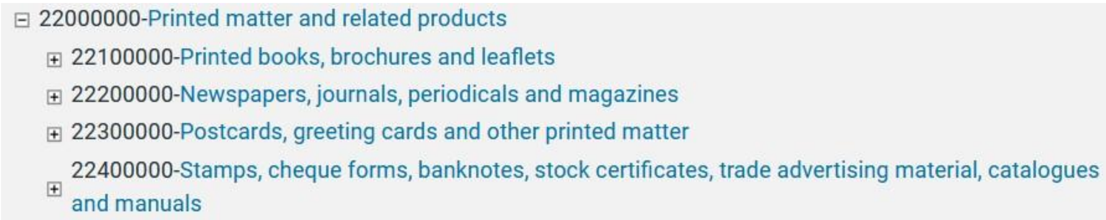


Figure 152: Hierarchical structure of CPV codes

   - 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

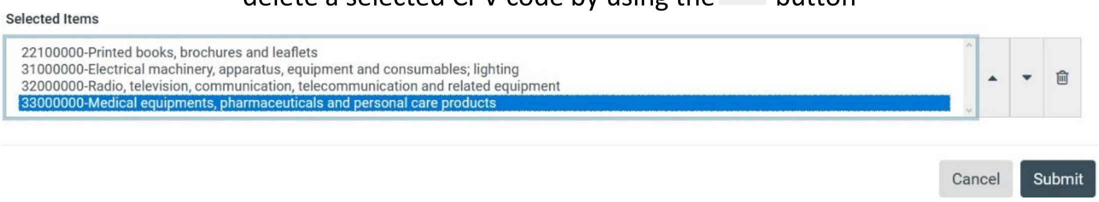


Figure 153: Selected CPV codes

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.

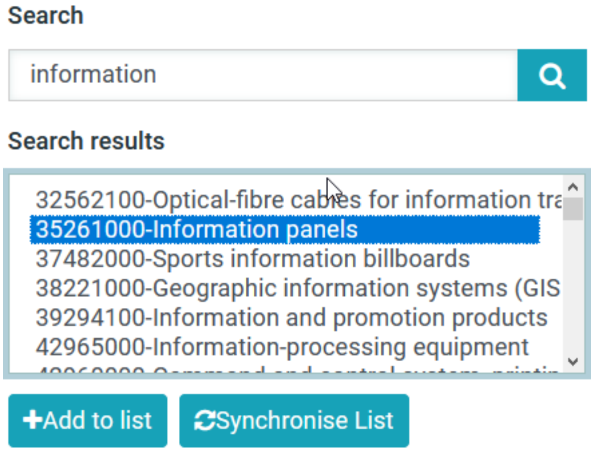


Figure 154: CPV search functionality

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.

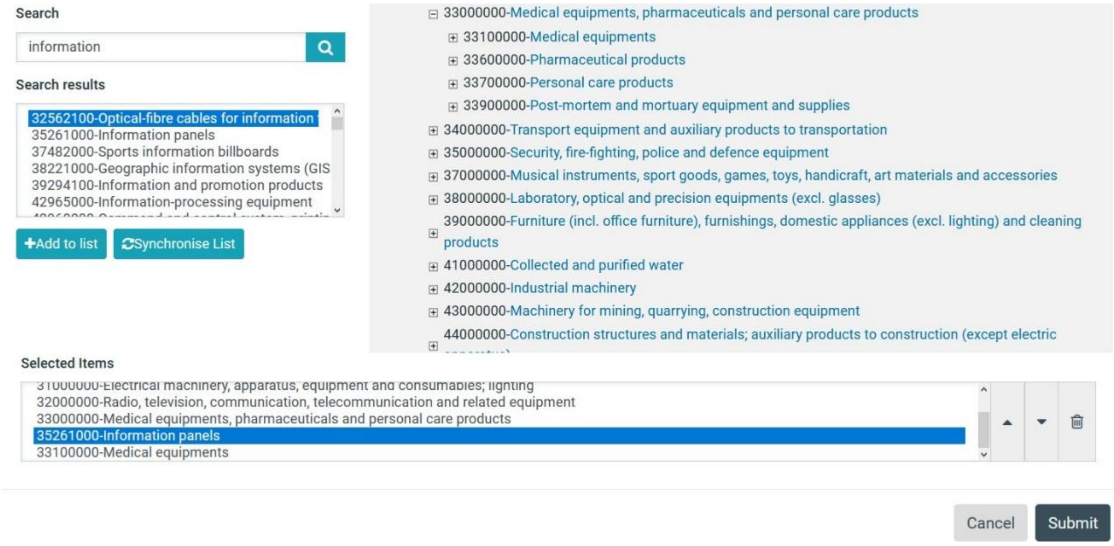


Figure 155: Selection of CPV codes

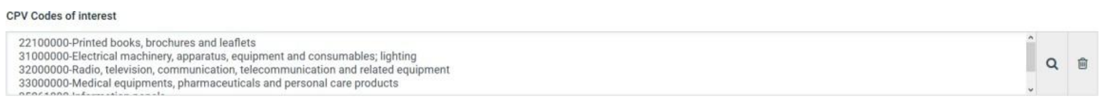


Figure 156: Submitted CPV codes

7.4 Insert Nomenclature of Territorial Units for Statistics Codes

In order to insert a code for the Nomenclature of Territorial Units for Statistics Codes (NUTS), a code selector functionality is also provided and accessible to the user, by selecting the search icon next to the NUTS field:

Figure 157: NUTS codes field

In the NUTS selection window, the following functionality is provided:

1. Select a NUTS code from the main NUTS window.
    - A detailed presentation of all codes in the tree hierarchy is possible using The + & - buttons.

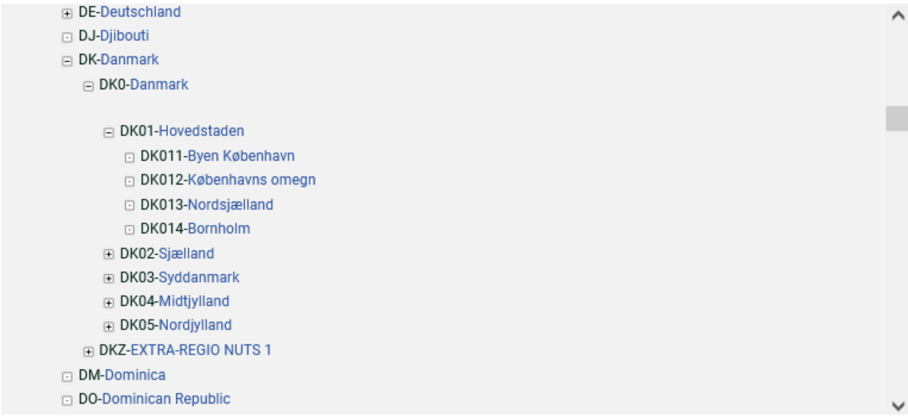


Figure 158: Hierarchical structure of NUTS codes

    - Double clicking on the NUTS code adds it to the list of the selected items. The user can delete a selected NUTS code using the " " button.

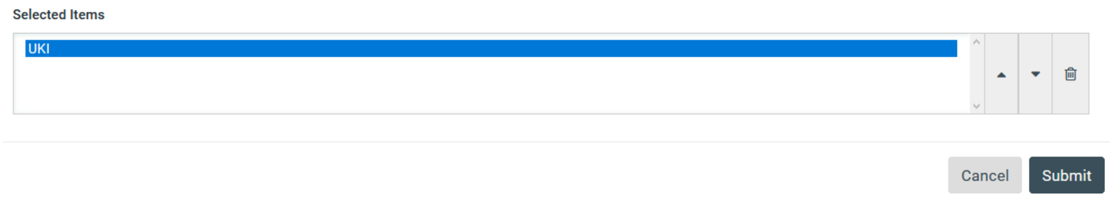


Figure 159: Selected NUTS code

2. The user can use the search functionality of a NUTS code:

- The user provides the title or the number of the code (entire or partial description) in the search field.
- The user clicks on the "**SEARCH**" button**.**
- The results are displayed in the search results window. Selecting a NUTS code and selecting the button "**Add to the List**" will include the NUTS code in the selected items.

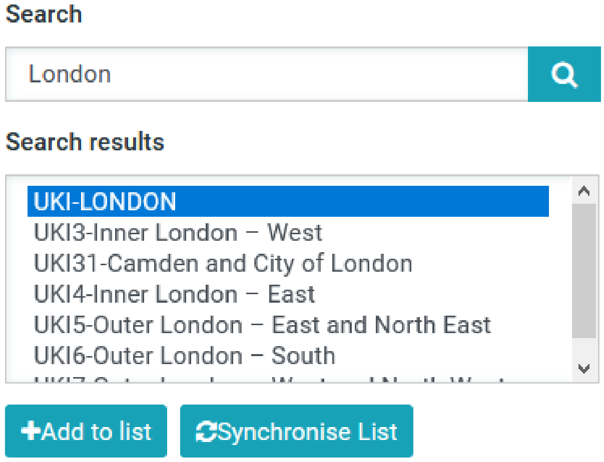


Figure 160: NUTS search functionality

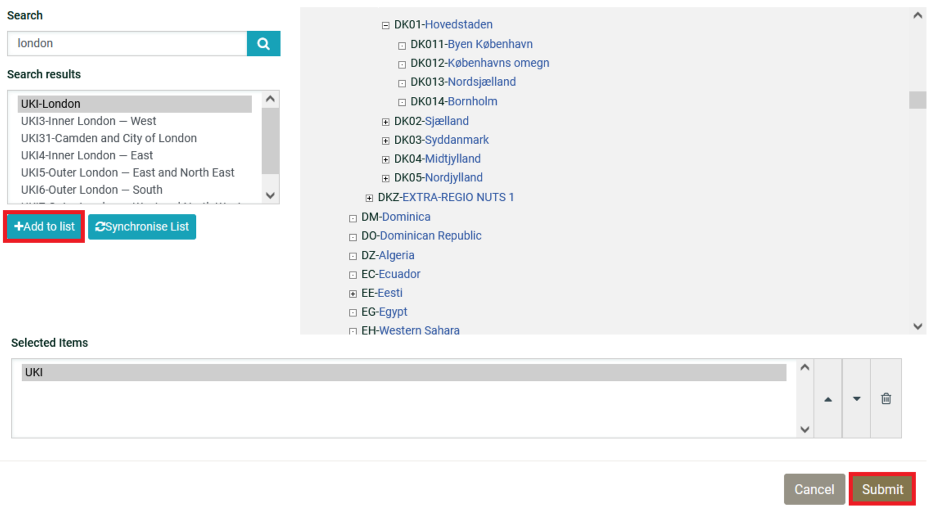


Figure 161: Selection of NUTS codes

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

Figure 162: Submitted NUTS code

8 Helpdesk contact details

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

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