Nigeria Government

Framework Contract for SaaS e-Procurement Solution

End-user Buyer Manual_v1.2

Issue 01

Version 1.2

EUROPEAN DYNAMICS S.A.

Modification History

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Table of Content

Table of Figures

Table of Tables

Acronyms / Abbreviations

Acronym	Term
AO	Accounting Officer
API	Application Programming Interface
APDP	Annual Procurement and Disposal Plan
BPT	Bid Preparation Tool
RDPCM	Resident Due Process Committee Member
RDPCS	Resident Due Process Committee Secretary
CPMS	European Dynamics Contract Performance Management System
CQS	Consultants Qualification Selection
BECC	Bid Evaluation Committee Chairperson
BEC	Bid Evaluation Committee
ED	EUROPEAN DYNAMICS
EOI	Expression of Interest
ePPS	European Dynamics electronic Public Procurement System
FA	Framework Agreement
FBS	Fixed Budget Selection
FDR	Further Discount Rate
GUI	Graphical User Interface
HD	Head of Department
HEB	Highest Evaluated Bid
HF	Head of Finance
HPDU	Head of Procuring and Disposal Unit
HPM	Head of Performance Monitoring
NSPPB	Nigeria State Public Procurement Board
LCS	Least Cost Selection
LO	Legal Officer
JSON	JavaScript Object Notation
NGN	Nigerian Naira
NUTS	Nomenclature of Territorial Units for Statistics (used in the EU)
OCDS	Open Contracting Data Standard
OP	Bid Opener
PDE	Procuring and Disposing Entity
PIN	Prior Information Notice

Acronym	Term
PO	Procurement Officer
QBS	Quality Based Selection
PMO	Performance Monitoring Officer
QCBS	Quality and Cost Based Selection
RFP	Request for Proposal
RfPQ	Request for Pre-Qualification
RN	Received Note (for all procurement categories)
SA	System Administrator
TCS	Technical Compliance Selection
UNSPSC	United Nations Standard Products and Services Code
URL	Uniform Resource Locator

1 Minimum and Recommended System Requirements

Minimum requirements:
Relatively recent Operating System (e.g. Windows XP or 7, or equivalent)
Office tools (e.g. MS Office support MS Word, MS Excel, or equivalent)
Email client (e.g. MS Outlook, or equivalent) with access to the end-user's mailbox
Browser: Internet Explorer (11 or higher), or Firefox (40 or higher), or Opera / Chrome / Safari (latest)
Session Cookies: enabled
Window Resolution: 1024 x 768
PDF viewer (e.g. Adobe PDF Reader, or equivalent)
Compression/decompression software (e.g. 7zip, winrar, or equivalent)
JavaScript enabled, for full end-user experience
Access to the Internet through HTTP/HTTPS
A valid e-mail address
Pop-up blockers disabled

Recommended requirements:
Windows 7, or above
MS Office 2003, or above
Email client (e.g. MS Outlook, or equivalent) with access to the end-user's mailbox
Browser: Internet Explorer (11 or higher), or Firefox (45.0.1 or higher)
Session Cookies: enabled
Window Resolution: 1024 x 768
PDF viewer (e.g. Adobe PDF Reader, or equivalent)
JavaScript enabled, for full end-user experience
Compression/decompression software (e.g. 7zip, winrar, or equivalent)
Access to the Internet through HTTP/HTTPS
A valid e-mail address
Pop-up blockers disabled

2 Bidding General Functionality

2.1 General Usage Guidelines

The procurement modules of the e-GP system will provide the following common navigation behaviour/functionality.

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

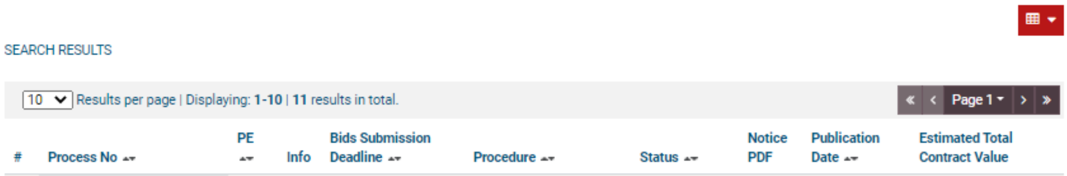


Figure 1: Example of a table header

The arrows are used for sorting the results (in ascending/descending order) by the corresponding field. The button is used to hide/ show a number of fields in the table. Any search query or list, with more than a page of results, will include the following navigation buttons:

Table 1: Pagination options

«	First Page
»	Last Page
‹	Previous Page
›	Next Page

The following buttons are also widely used within e-GP:

Table 2: Additional options

Calendar Button. Selecting this button opens a calendar enabling the user to select a date

Search Button. Selecting this button opens a searching window enabling the user to search for various codes (e.g. UNSPSC codes)

Clear Button. This button clears the selection of the user

2.2 The Process Menu Functionality

During the creation and manipulation of a process, the Process Menu contains all available choices to the user. The Process Menu is collapsed by default:

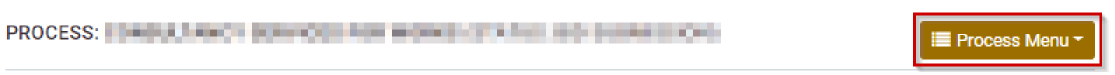


Figure 2: The Process Menu (collapsed)

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

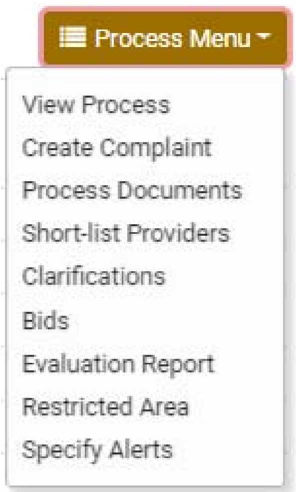


Figure 3: The Process Menu (expanded)

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

2.3 Main Page

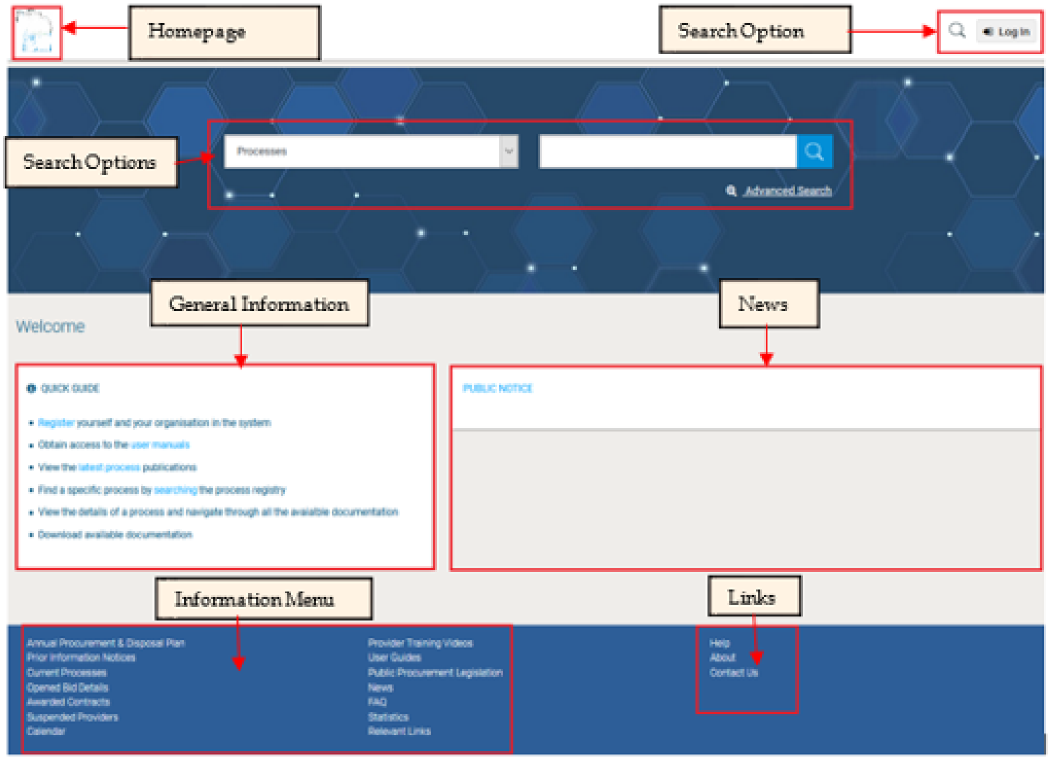


Figure 4: Main page

The main page of the e-GP system consists of the following elements:
Top column, which contains the Login panel, Homepage Panel and Search option Panel.

Central column, which contains general information regarding the system, the Providers and the users of the Procuring and Disposing Entity. Furthermore, it lists any uploaded news about the system usage.
Bottom column, which contains the Information menu panel, helpful links and functionalities which are available within all pages of e-GP.

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

2.3.1 Login Section

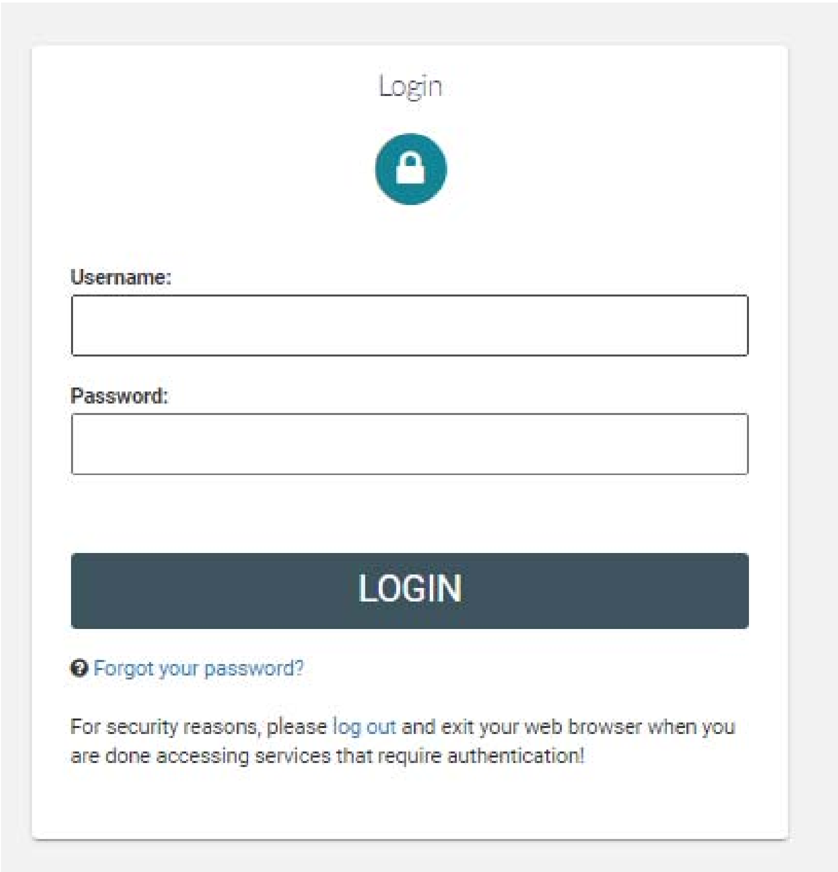


Figure 5: Login panel

In this section, this functionality is provided to enable all users (Procuring and Disposing Entity, Providers and Administrators) to login in the system provided that they use the correct credentials (username and password). Furthermore, the functionality to recover a user's password is included.

2.3.2 Search Section

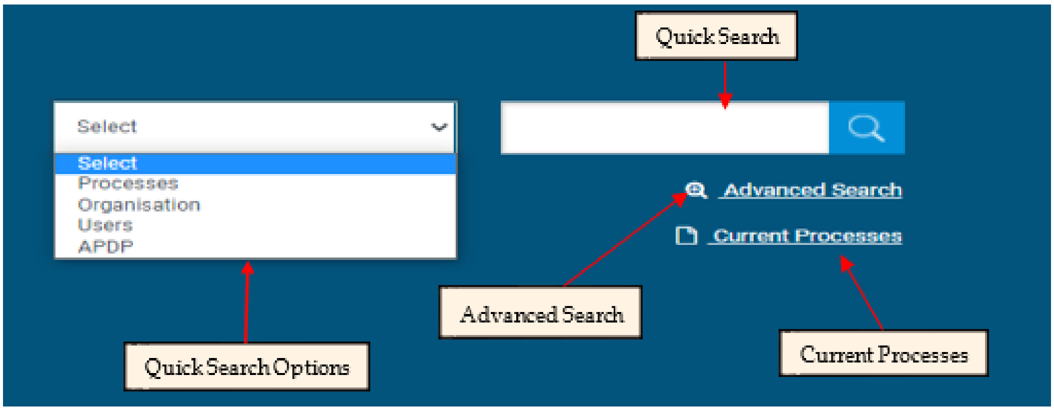
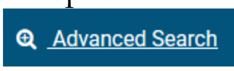


Figure 6: Search panel

The users can use this section to search for Processes, Organisations, Users and Annual Procurement and Disposal Plan entries. Advanced searching functionality, (by selecting the 

button) is also provided (Figure 6). Finally, the users also can search for Current Processes.

2.4 Login to the System

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

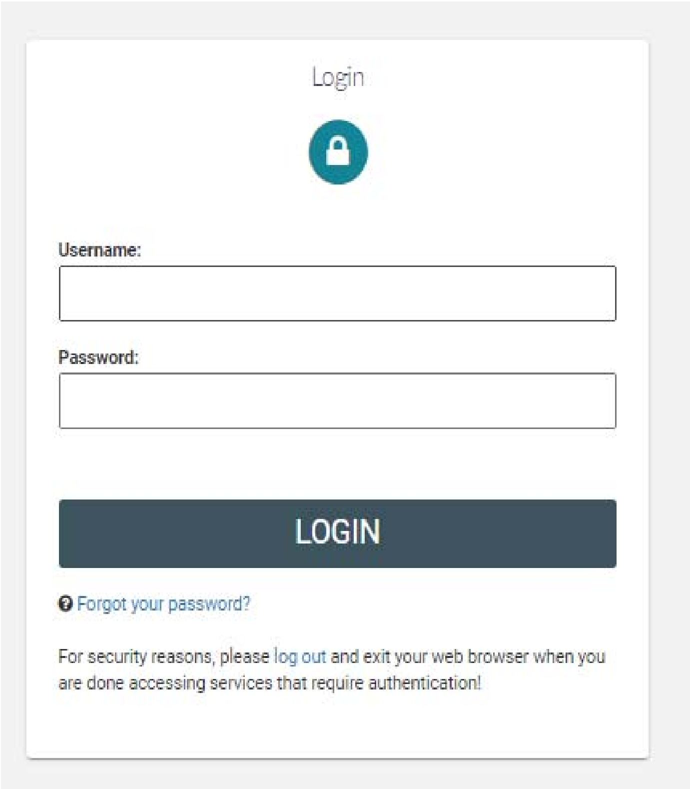


Figure 7: User login

If the user provides incorrect credentials (either user name or password) an error message will be displayed, informing the user regarding the remaining failed attempts:

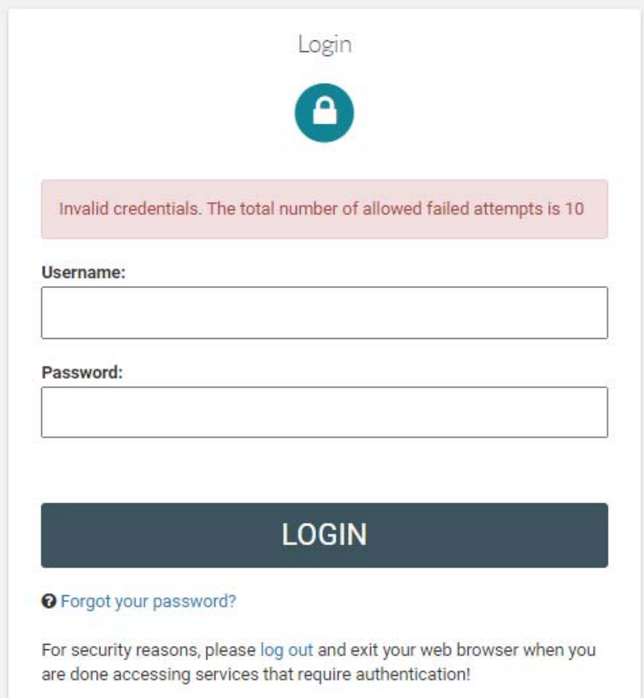
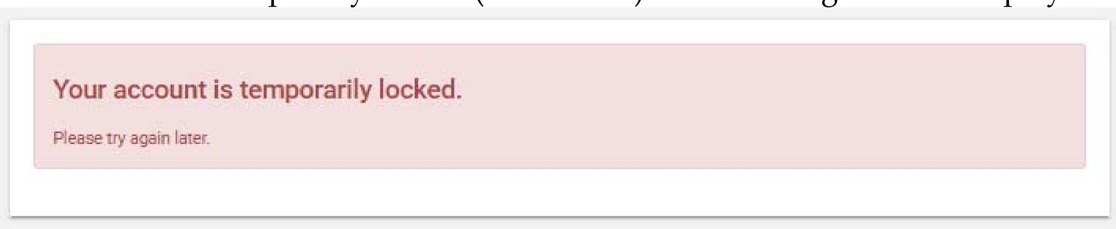


Figure 8: Wrong credentials

If the user provides an incorrect password for a username more than 10 times, his account will be temporally locked (10 minutes) and a message will be displayed.



2.5 Login to the System for the First Time

The following steps are available, when the user logs in to access the e-GP services for the first time.

As a first step, the user will have to provide the transaction number (which is received by email after his successful registration on the platform):

```
Your Organisation has been registered as a Procuring Entity on e-GP,
and the Registration process has been succesfully completed.

To verify your registration please follow this link to log in to e-GP:
[redacted]

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

Enter your transaction number during the login process to verify your registration.

DO NOT DELETE THIS
*************************************************************************
IMPORTANT: All actions within e-GP 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 e-GP 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 9: Confirmation email received during registration.

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

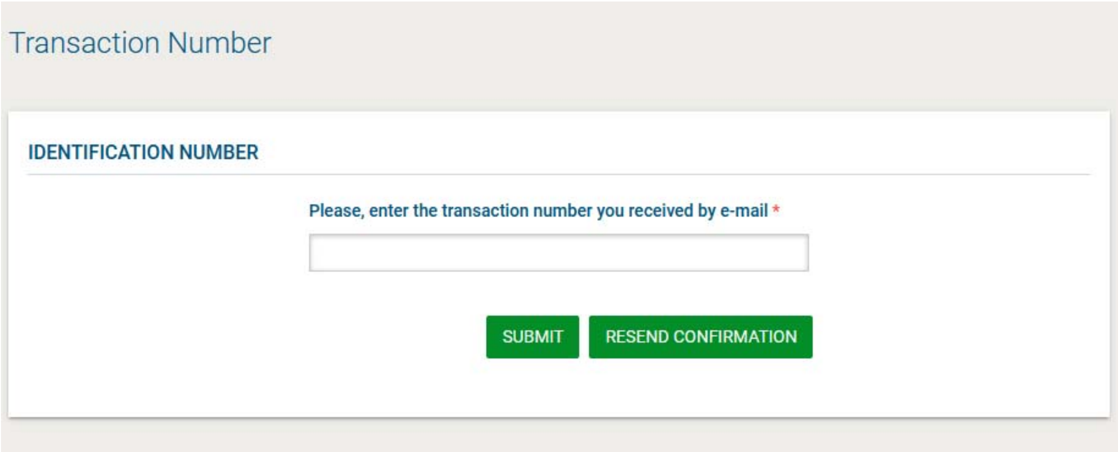


Figure 10: The transaction number

If the user has misplaced the e-mail with the transaction number, it can be resent to the registered e-mail address by clicking on the RESEND CONFIRMATION button.

Then, the user is prompted to read and accept the System User Agreement and the system Requirements:

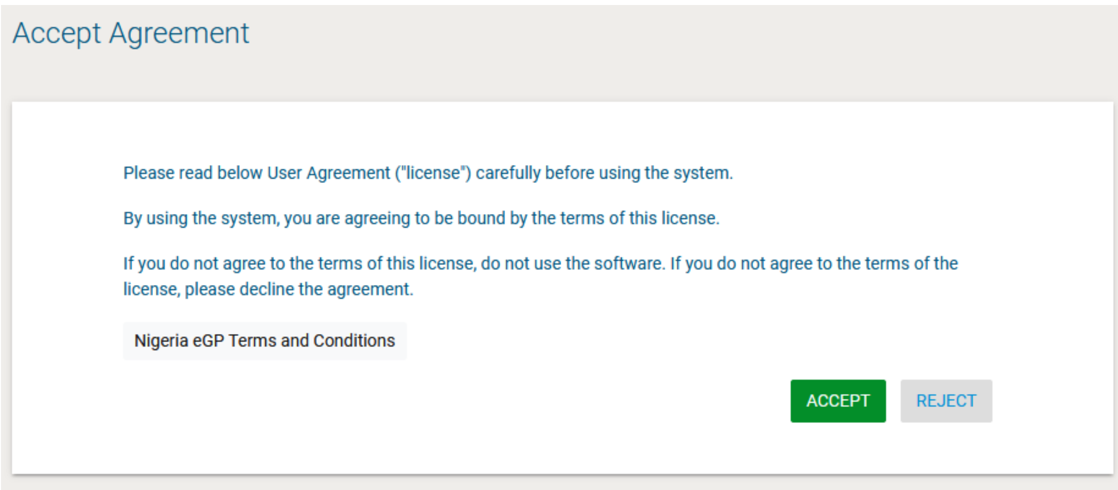


Figure 11: Confirmation of the user agreement

The user is requested to edit his/her password

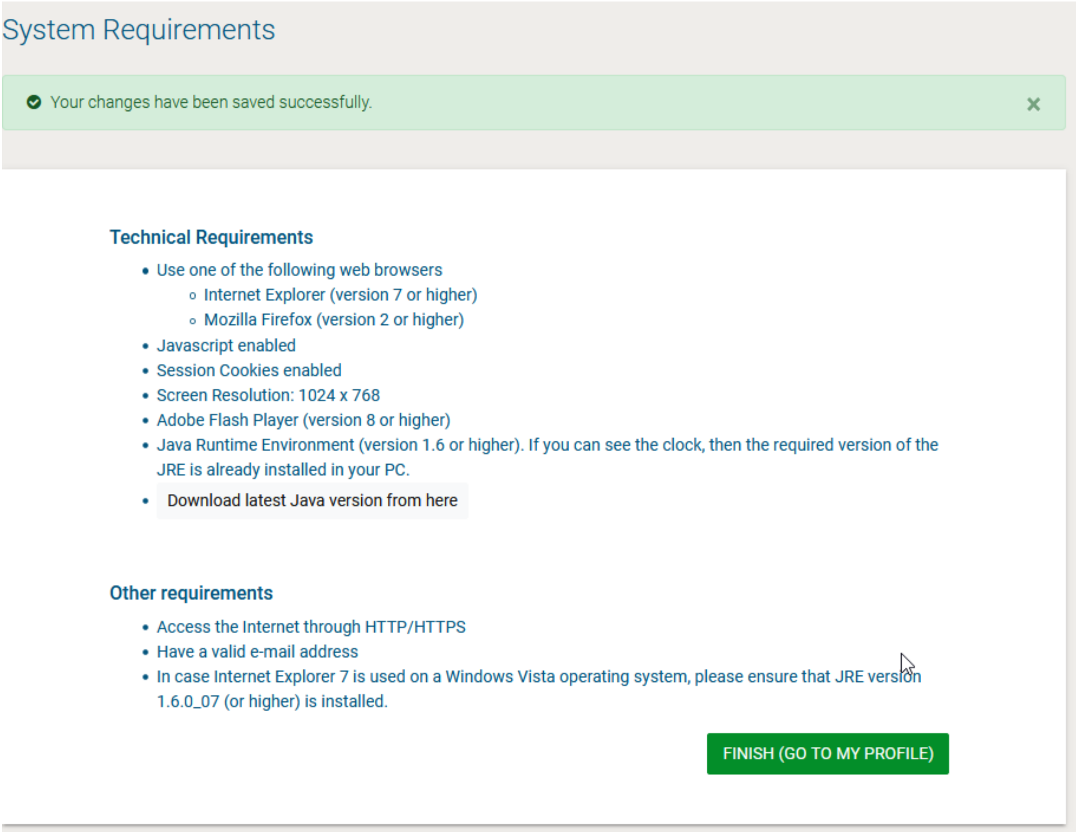


Figure 12: Confirmation of the System Requirements

Finally, The user is requested to edit his/her password

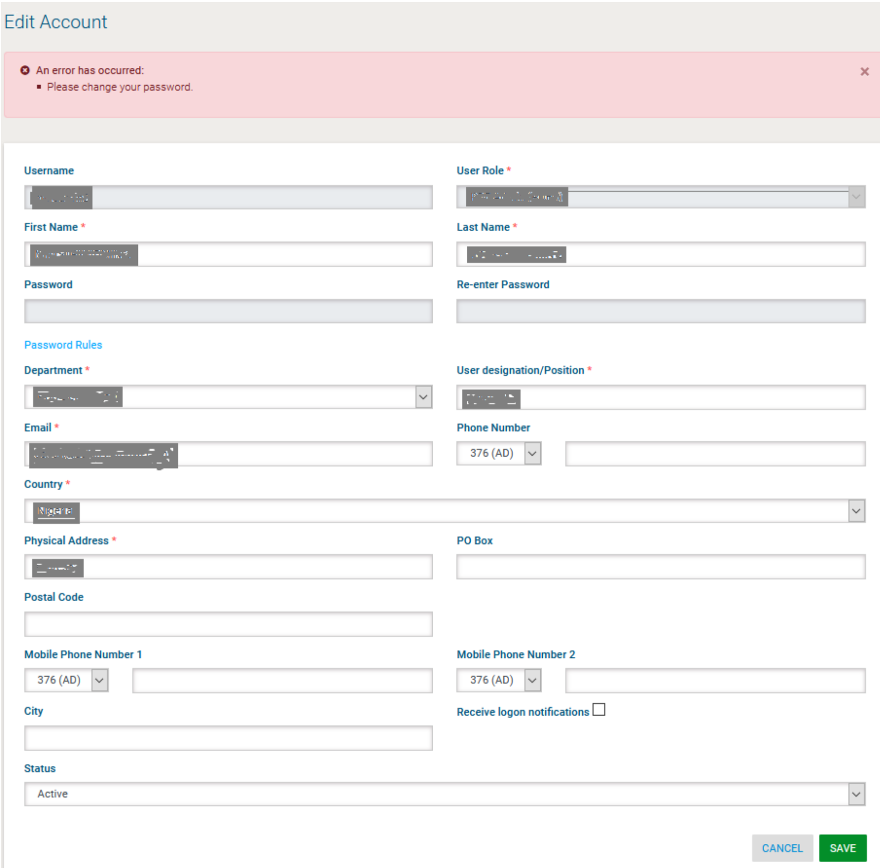


Figure 13:Edit User's Password

2.6 Log Out from the Platform

The user can exit the e-GP services by selecting the "Log Out" functionality:

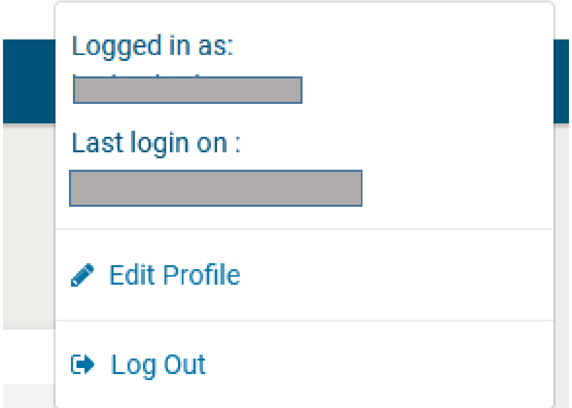


Figure 14: Logout functionality

2.7 Password Recovery

The user can recover his password from the "Forgot your password" functionality (Figure 5) available from the login page.

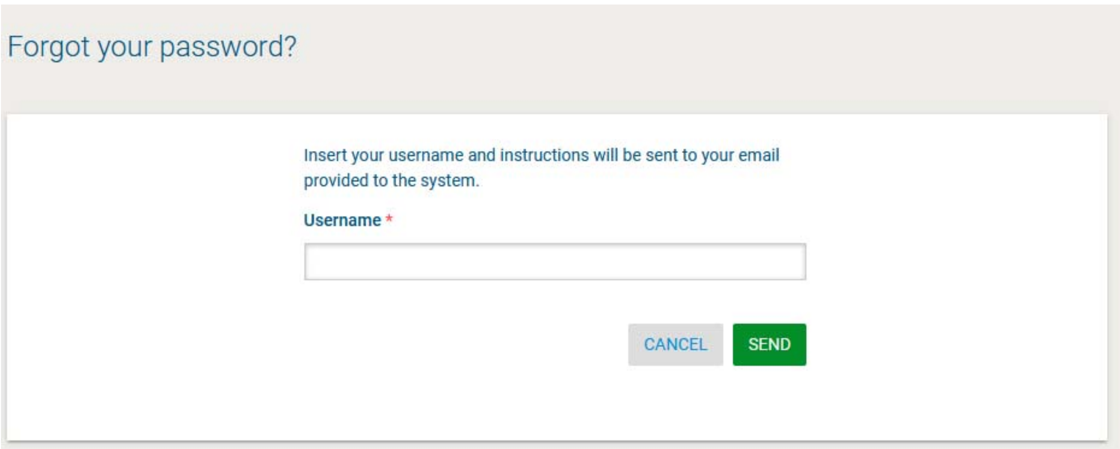
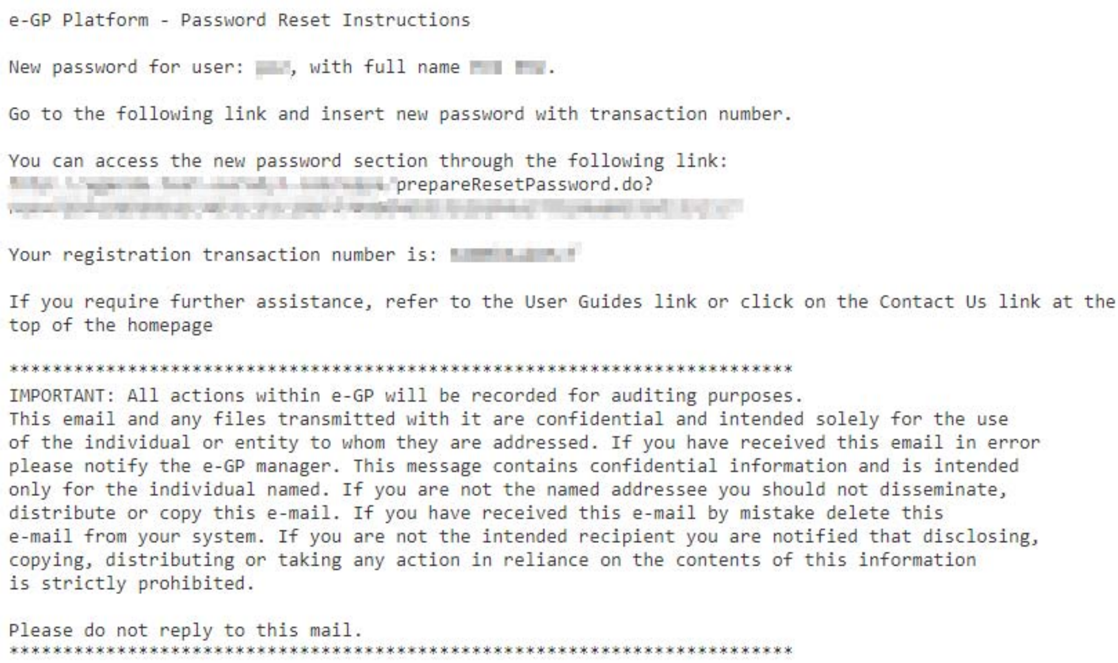


Figure 15: Password recovery/change

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


e-GP 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:
[redacted]prepareResetPassword.do?
[redacted]

Your registration transaction number is: [redacted]

If you require further assistance, refer to the User Guides link or click on the Contact Us link at the top of the homepage

****
IMPORTANT: All actions within e-GP 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 e-GP 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: Email containing a registration transaction and unique access link

In order to reset the password, the user accesses the displayed link. To trigger the password reset functionality, the system requires the user to provide:
Username
New password
Password confirmation
Transaction Number
Secret question response

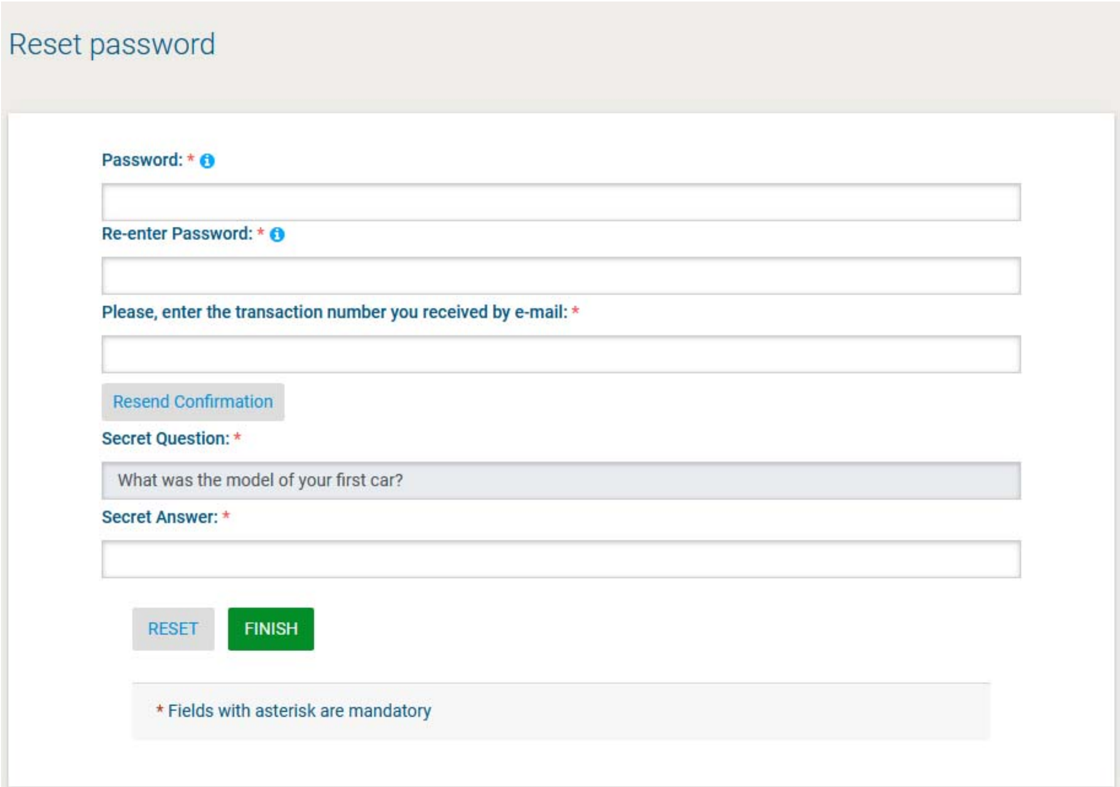


Figure 17: Resetting the password

2.8 Maintenance of User's Profile

After successful authentication the user can edit their profile by selecting the "Edit Profile" functionality accessible from the left menu.

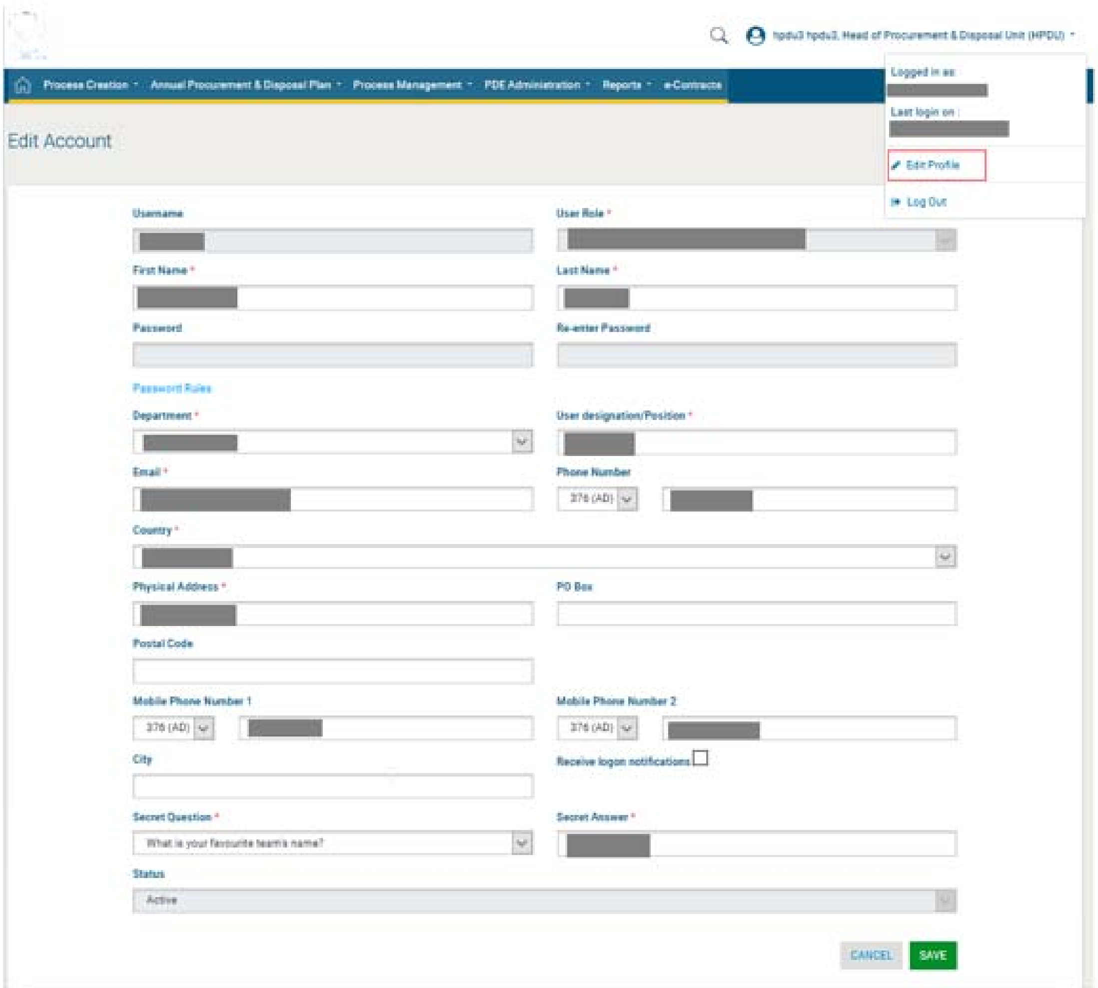


Figure 18: Edit User's Profile

The password should follow a specific configuration. To view the password rules the user should click on the link "Password Rules" (Figures
Figure 18 and Figure 19).

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

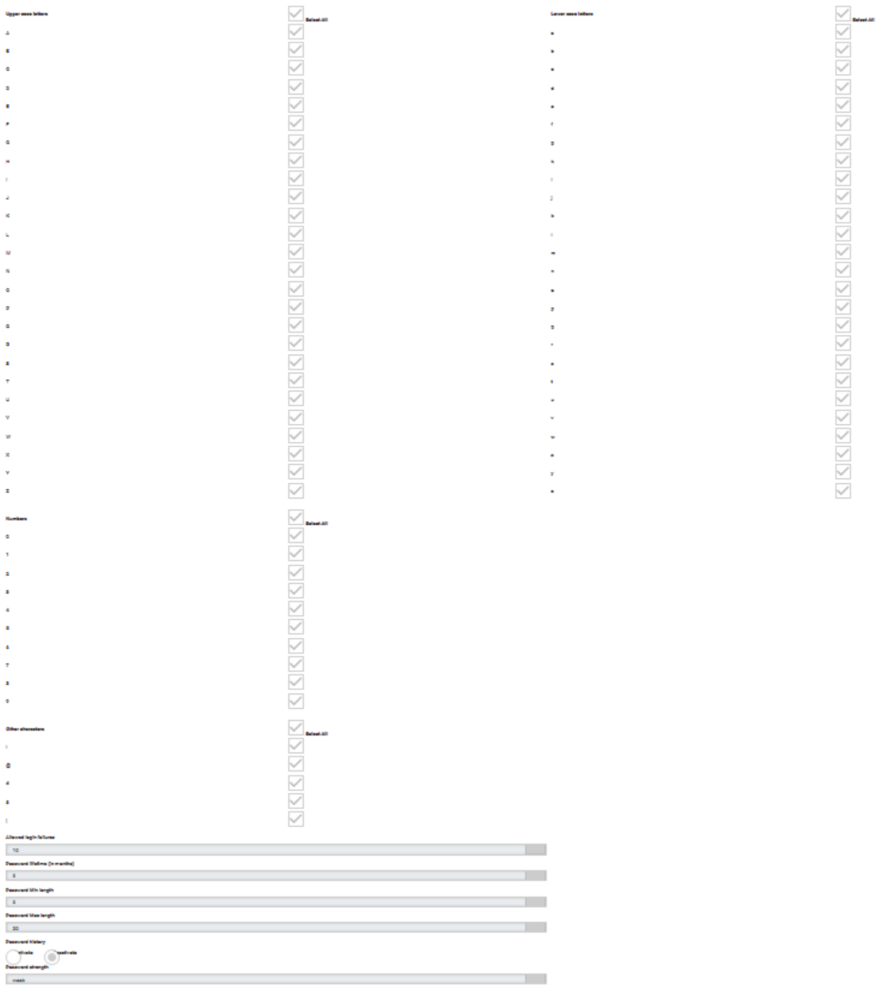


Figure 19: Password Configuration Rules

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

2.9 XLS File Format Support

All XLS files uploaded to the e-GP system must abide to the Microsoft Office Excel 2003 format.

> All XLS files must abide to the Microsoft Office Excel 2003 format.
>
> Users that have later versions should save their files in 2003 format (Save as type and select the option "Excel 97-2003 Workbook").

2.10 XLS File Upload Validation

Every time a new XLS file is uploaded onto the e-GP system, the system performs validation checks to ensure that the uploaded file abides to the pre-defined template for the upload. There are several different templates supported by the system, namely:
Annual Procurement and Disposal Plan XLS
Evaluation Report XLS

Whenever an invalid XLS file is uploaded onto e-GP, the system will either present to the end-user the reasons for not accepting it (e.g. invalid format), or will grant the end-user access to download an Error Report XLS, which details the precise reasons rendering the XLS invalid.

2.11 Procuring and Disposing Entity Management - System Roles

User with the PDE Admin (PDEA) role can edit the PDE information as well as the PDE user management:
Edit organisation details
View the users registered within the procuring entity
Add new users to the procuring entity
Edit user's details

The Procuring and Disposing Entity Management functionality is provided through the "PDE Administration" menu:

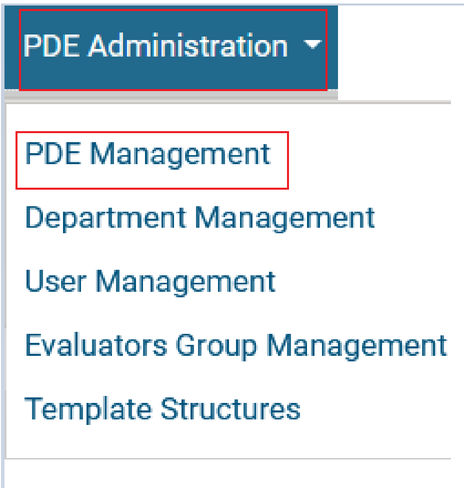


Figure 20: PDE Administration menu

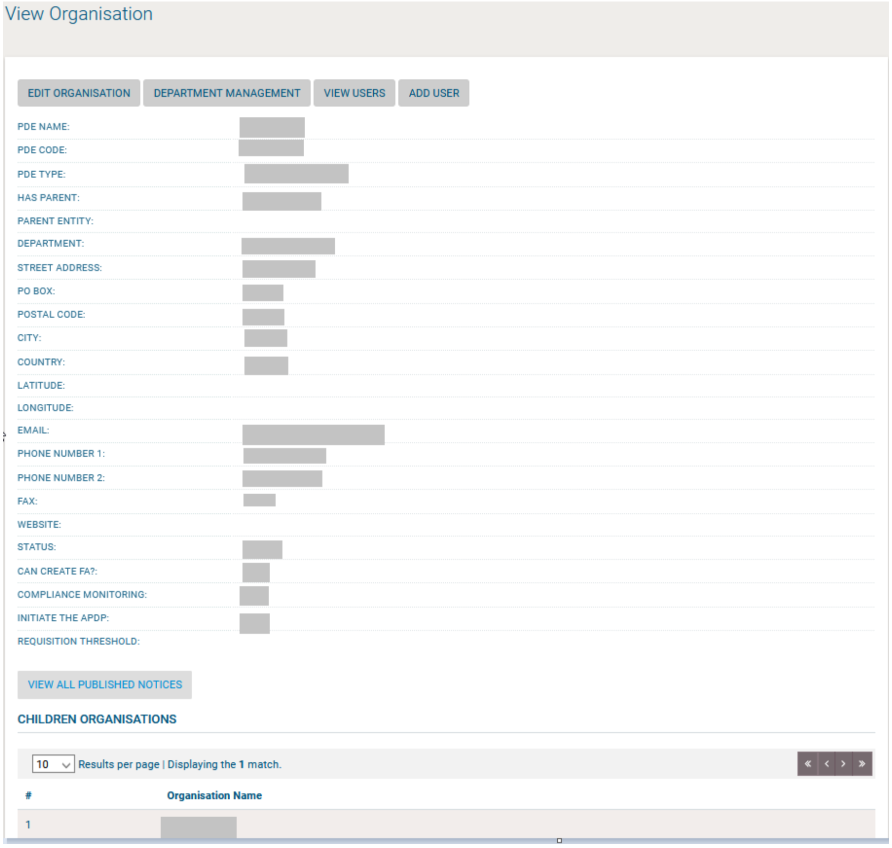


Figure 21: Management of Procuring and Disposing Entity Details

2.11.1 Edit Organisation Details

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

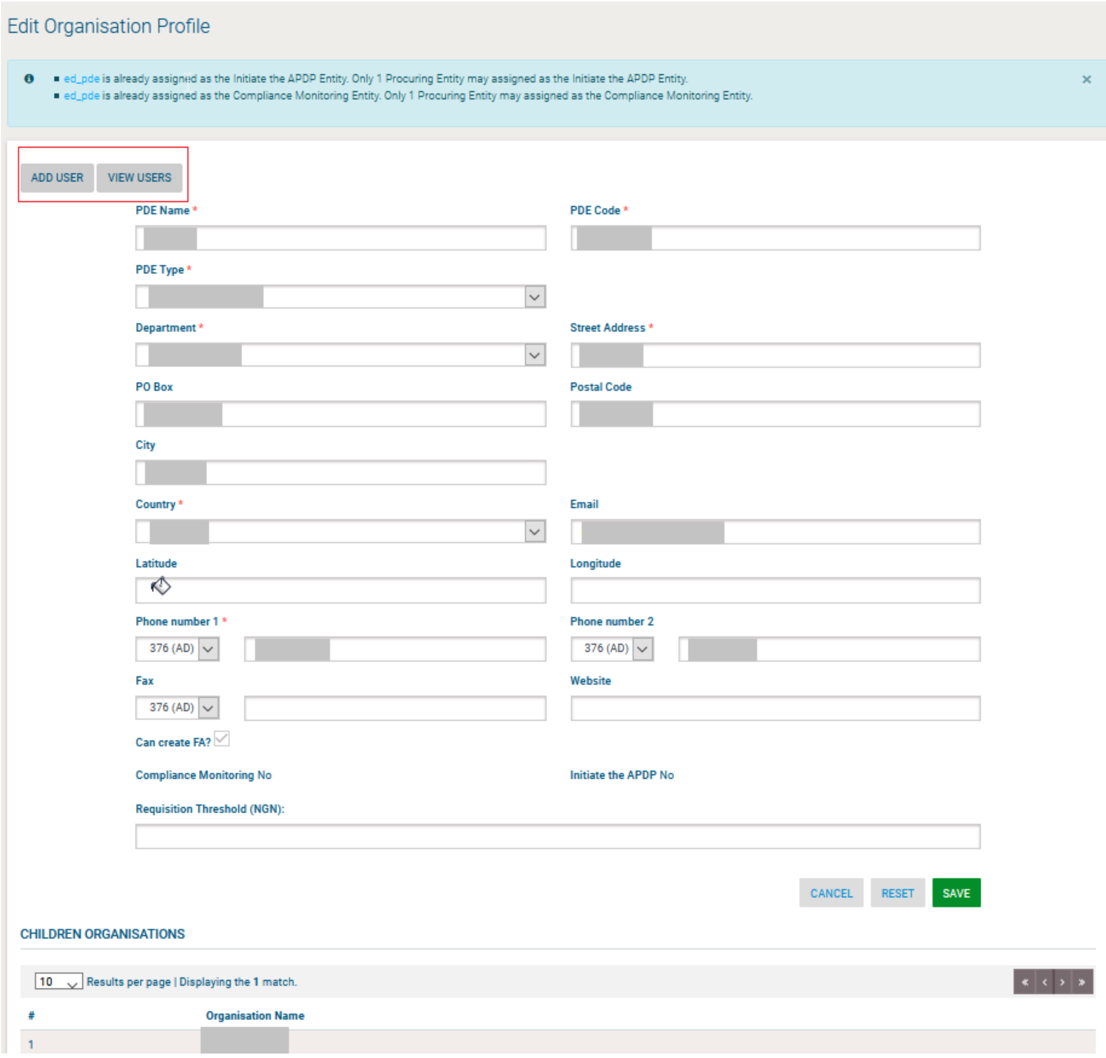


Figure 22: Editing Organisation details

2.11.2 View the Users Belonging to the Procuring and Disposing Entity

Selecting "View Users" functionality allows displaying all the users registered within the selected entity:

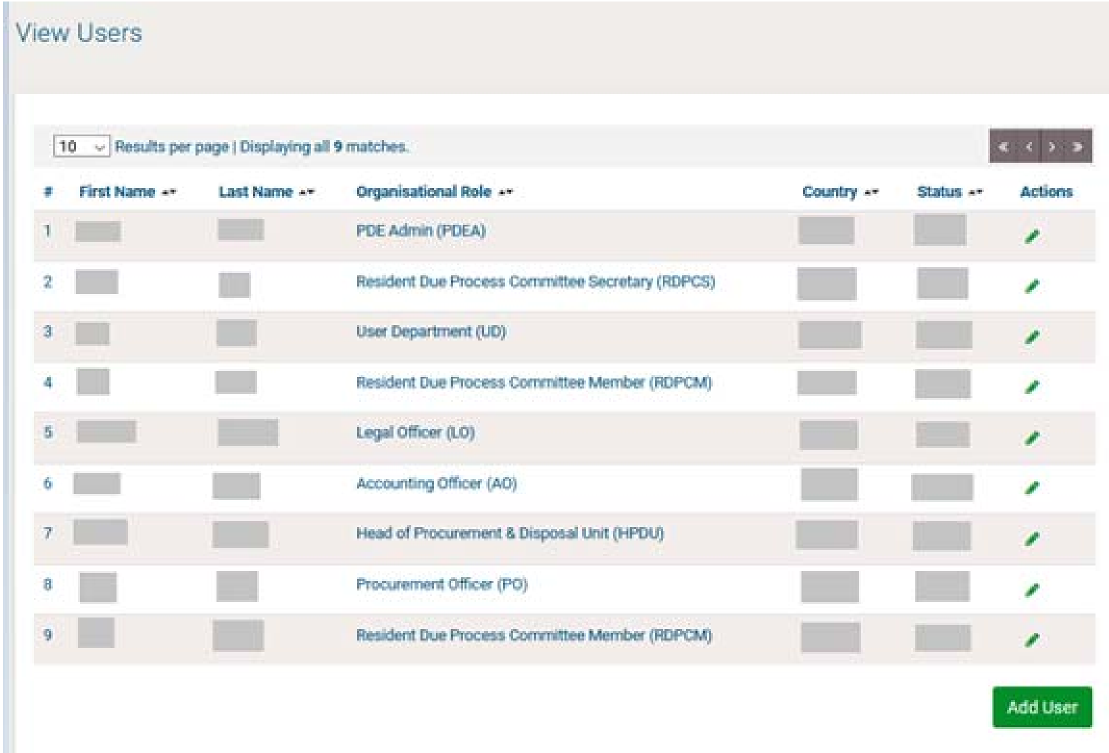


Figure 23: Display of users belonging to the PDE

The name, the role, the country and the current status (active, inactive, deactivated, etc.) and available actions of each user are displayed.

The following user roles are supported:

The roles a user can acquire according to legislation, are the following:

<u>PDE Admin (PDEA):</u> Such a user will be responsible to edit the PDE information as well as the PDE user management.
<u>Accounting Officer (AO):</u> Assigned to leading officers of a PDE. Such a user has access rights to manage the PDE and its users and has increased visibility on process details (i.e. evaluation reports and award etc.).
<u>Head of Procurement & Disposal Unit (HPDU):</u> Such a user has similar access rights to the AO and acts as the leader of the Procurement & Disposal Unit (PDU).

Head of Department (HD): Such a user will be responsible to consolidate the APDP of his Department.
User Department (UD): Is the Department user.
Procurement Officer (PO): Assigned to officers that do not require the highest level of access. These form a "pool" of officials that may be associated with a specific procurement for performing specific activities. Such users can only be located in the Procurement & Disposal Unit.
Head of Finance (HF): To confirm funds availability to procure during the initiation stage.
Resident Due Process Committee Member (RDPCM): Assigned to current members of the Resident Due Process Committee Member . Such a user will be responsible to announce his decision within the system in case of online Resident Due Process Committee Member Approval. The RDPCM users will have view only access to the processes of their PDE.
Resident Due Process Committee Secretary (RDPCS): This user will upload Resident Due Process Committee minutes and decisions on behalf of the Resident Due Process Committee in case of offline Resident Due Process Committee Approval. The RDPCS user will have view access only to the processes of his/her PDE.
Legal Officer (LO): Such a user can only be allocated the Contract Reviewer role for processes in his/her own Procuring & Disposal Entity.
Internal Auditor (IA): Such a user can only be allocated the Auditor role for processes in his/her own Procuring Entity.

The following roles are only available when the "Performance Monitoring" flag is set for the Procuring & Disposal Entity:
Head of Performance Monitoring (HPM): Such a user is responsible to associate PMO users on any process in the e-GP.
Performance Monitoring Officer (PMO): Such a user can be allocated the Auditor role on any process in the e-GP.

2.11.3 Insert a New User in a Procuring and Disposing Entity

Both the PDEA and the Admin user can insert a new user in a particular Procuring Entity by providing all of the following details:

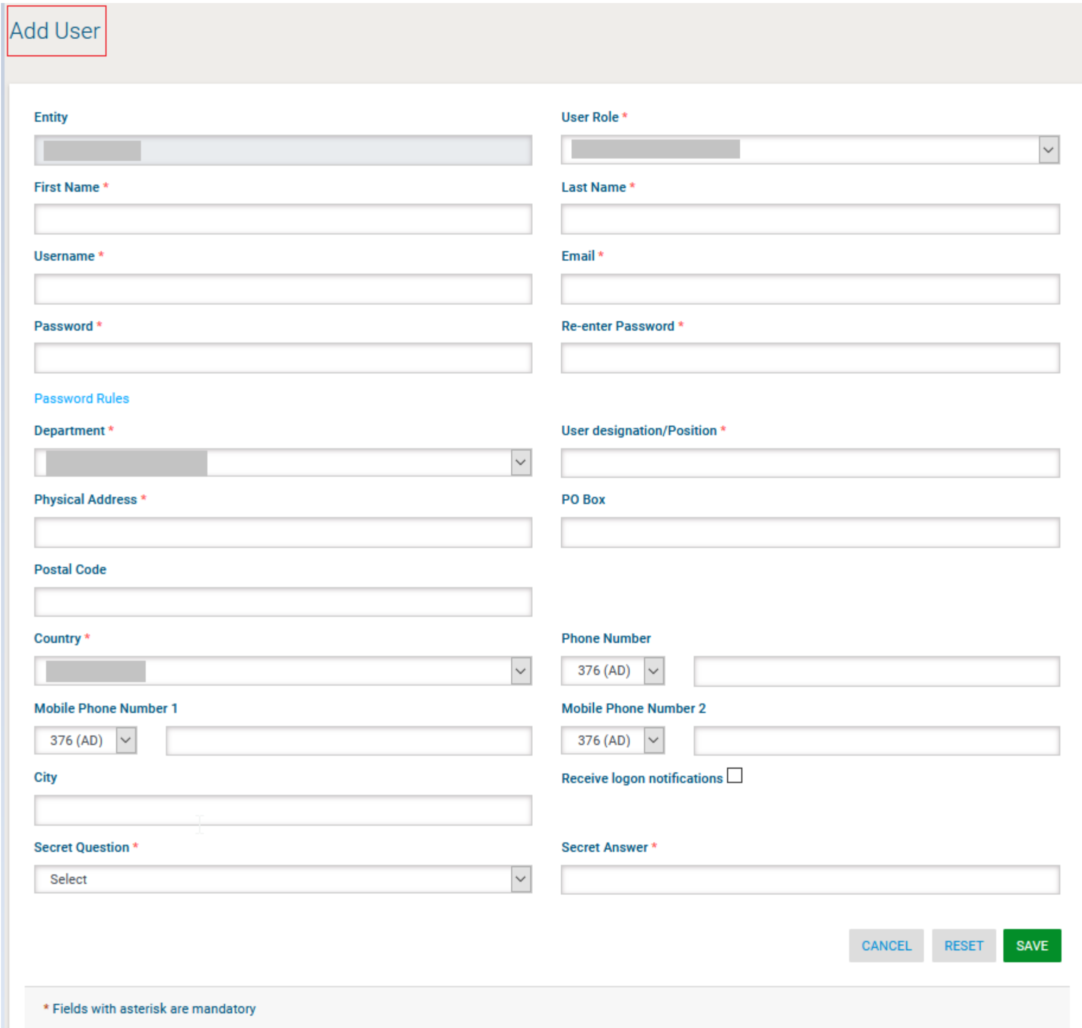


Figure 24: Insert a new user in a Procuring and Disposing Entity

Keep a note that every Entity, will have only one HF and one AO user active.

2.11.4 Department Management

The creation of the Departments can be done from the Admin or the PDEA user. They can add, edit and delete departments. Upon the creation of the departments the PDEA user can start to add users.

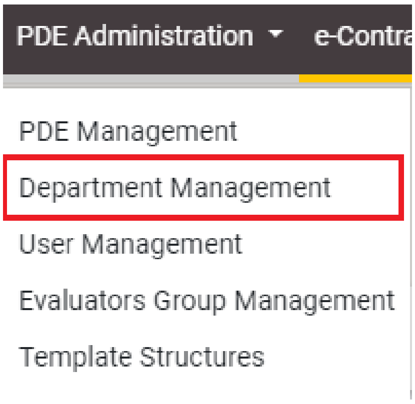


Figure 37 Department Management Menu

The following section is available to be edited from admin and PDEA user. These users have the rights to edit the department details upon clicking on . Also, they can delete a department by clicking on the . Please note that a department can be deleted only when there are no users under this department.

To add more departments to the PDE they can click on the button 

Figure 38 Department Management Administration

Upon clicking on the Add Department button a new screen is demonstrated to the user. The user needs to name the department and click on the save button.

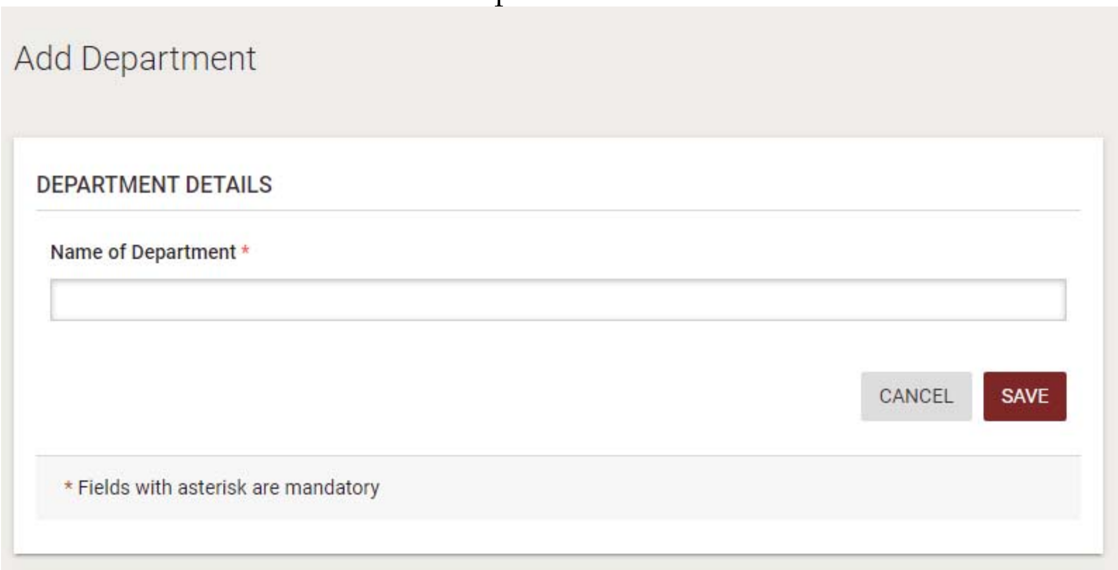


Figure 39 Add Department

2.11.5 Edit User's Details

A user with the appropriate editing rights (i.e. PDEA user or Administrator user), can select to edit the details of another specific user:

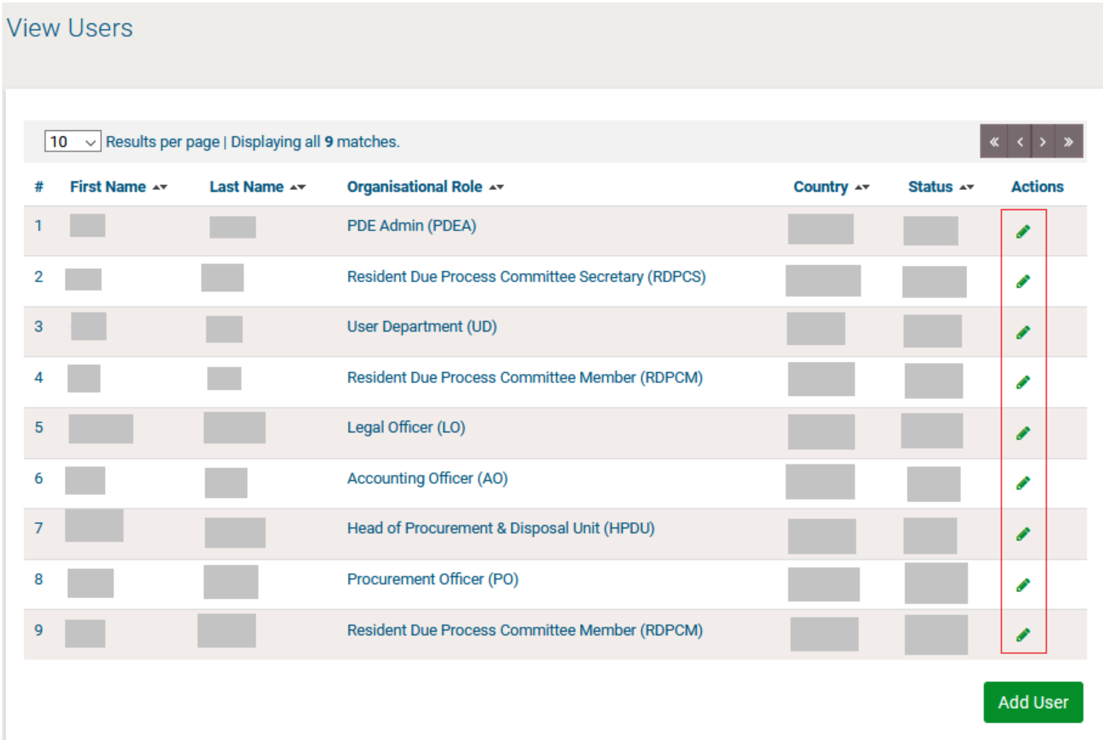


Figure 25: Editing user details

2.11.6 Logon Notifications

A user can choose to be notified by e-mail whenever their credentials are used to login to the e-GP system. This is accomplished on the Edit Profile page by selecting the checkbox to enable logon notifications.

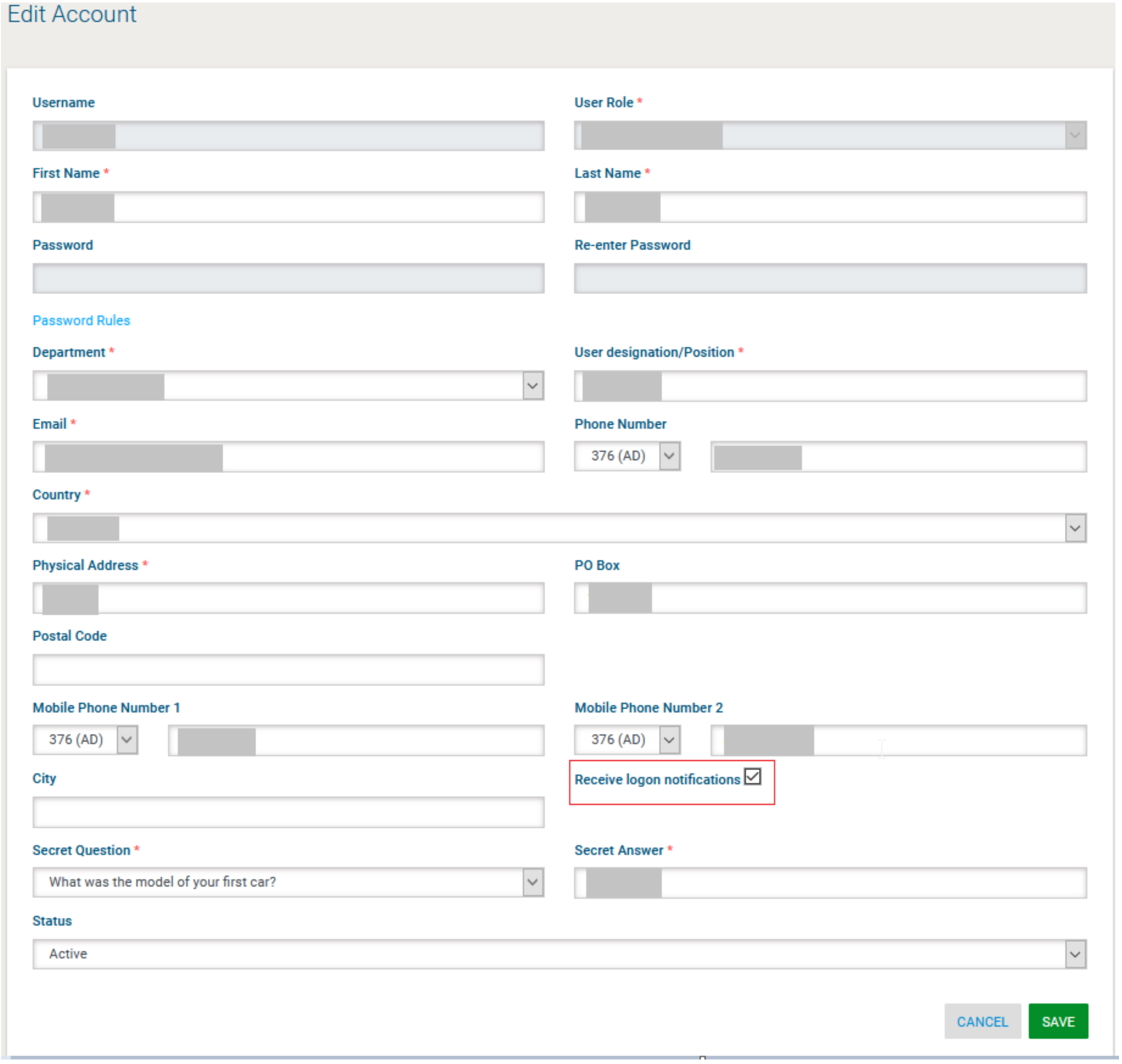


Figure 26: Logon notifications

If the logon notifications are enabled/disabled by an administrative user and not by the individual user, the user receives an e-mail notification that their profile has been modified.

```
Your account on e-GP has been modified by the administrator to enable/disable logon notifications.

You can view your profile by clicking on the link below:
[redacted]

If you require further assistance, click on the "Contact Us" link at the top of the homepage.

*************************************************************************
IMPORTANT: All actions within e-GP 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 e-GP 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 27: Logon notifications administrator action confirmation e-mail

When login notifications are activated, each time the user's credentials are used to login to e-GP, an e-mail notification is sent to the registered e-mail address of the user.

```
Your username [redacted] and password have been used to logon to the e-GP system on [redacted] If you did
not perform this action, you
should reset your password using the link below as soon as possible and notify your system administrator of the
unauthorised logon:
[redacted]

If you don't know who your system administrator is or if you require further assistance, click on the "Contact Us" link
at the top of the homepage.

We have sent this notification because you have subscribed to receive notifications whenever a logon is processed for
your account.
If you wish to disable future notifications, you can modify your profile by clicking on the link below:
[redacted]

*************************************************************************
IMPORTANT: All actions within e-GP 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 e-GP 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 28: Logon notification e-mail

2.11.7 Approving Registrations

After the registration of a Provider and the subsequent payment of the registration fee, the PA (Provider Approver) user of the organisation designated with the compliance monitoring flag, is required to approve the validity of the newly registered organisation.

The system displays a list of registrations pending further actions (
Figure 29). The following status symbols are used:

Figure 29: List of Registration

In order to approve a pending registration, the PA user selects the relevant link in the "**Organisation Name**" column (
Figure 29). The system displays the details of the organisation (Provider) pending approval.

If the provider has not yet paid their registration fee, the PA is notified that the provider cannot be activated at this point in time.

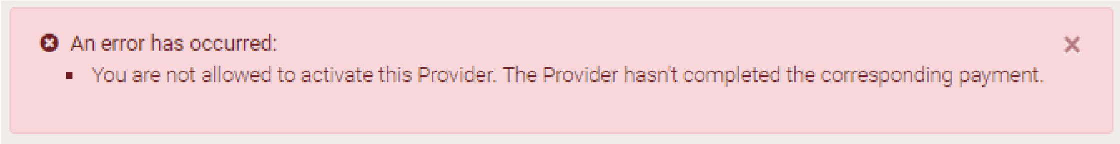


Figure 30: Pending provider registration payment

The PA can "**Approve**" or "**Reject**" the registration (Figure 31). In case the Provider Approver rejects a Provider all the details of the organisation including the registered user, are deleted from the system.

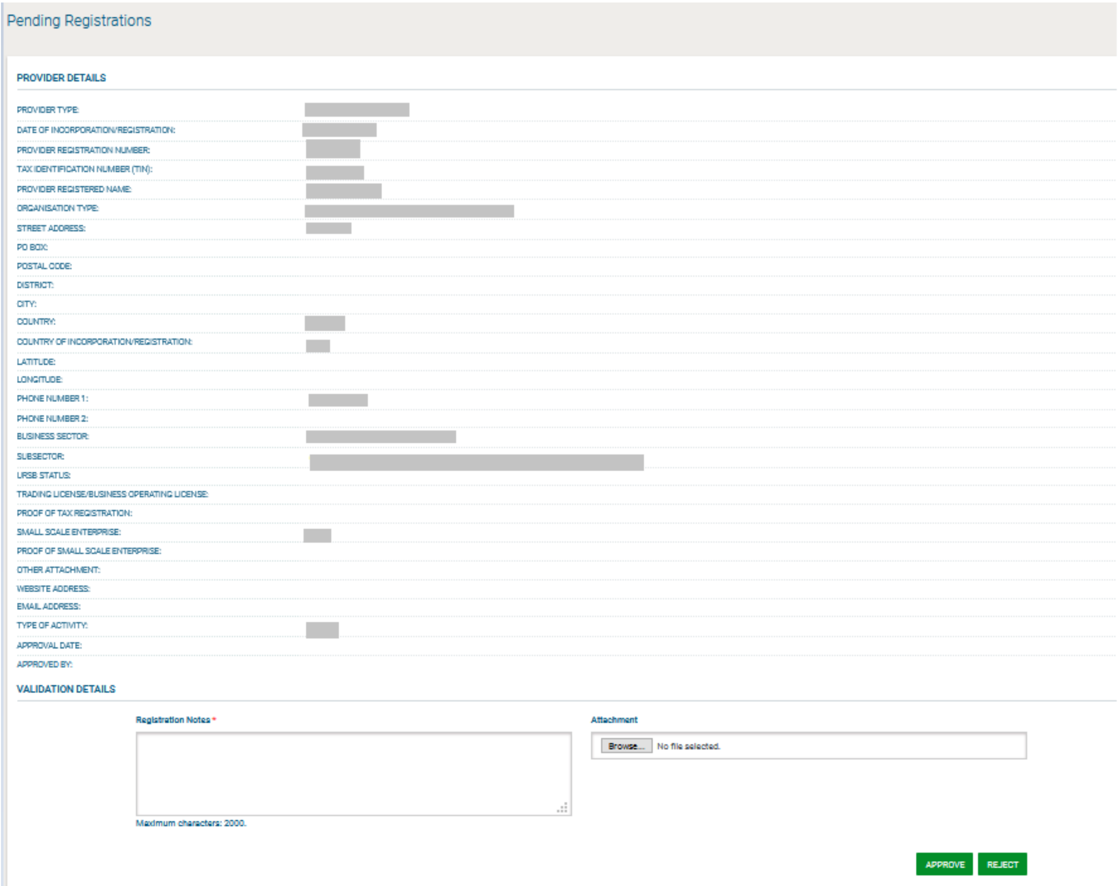


Figure 31: Approve pending registration

In case an Organisation has edited his details his status is set back to "Pending", and the PA user has to accept or reject one again the Organisation, after he has reviewed the modifications.

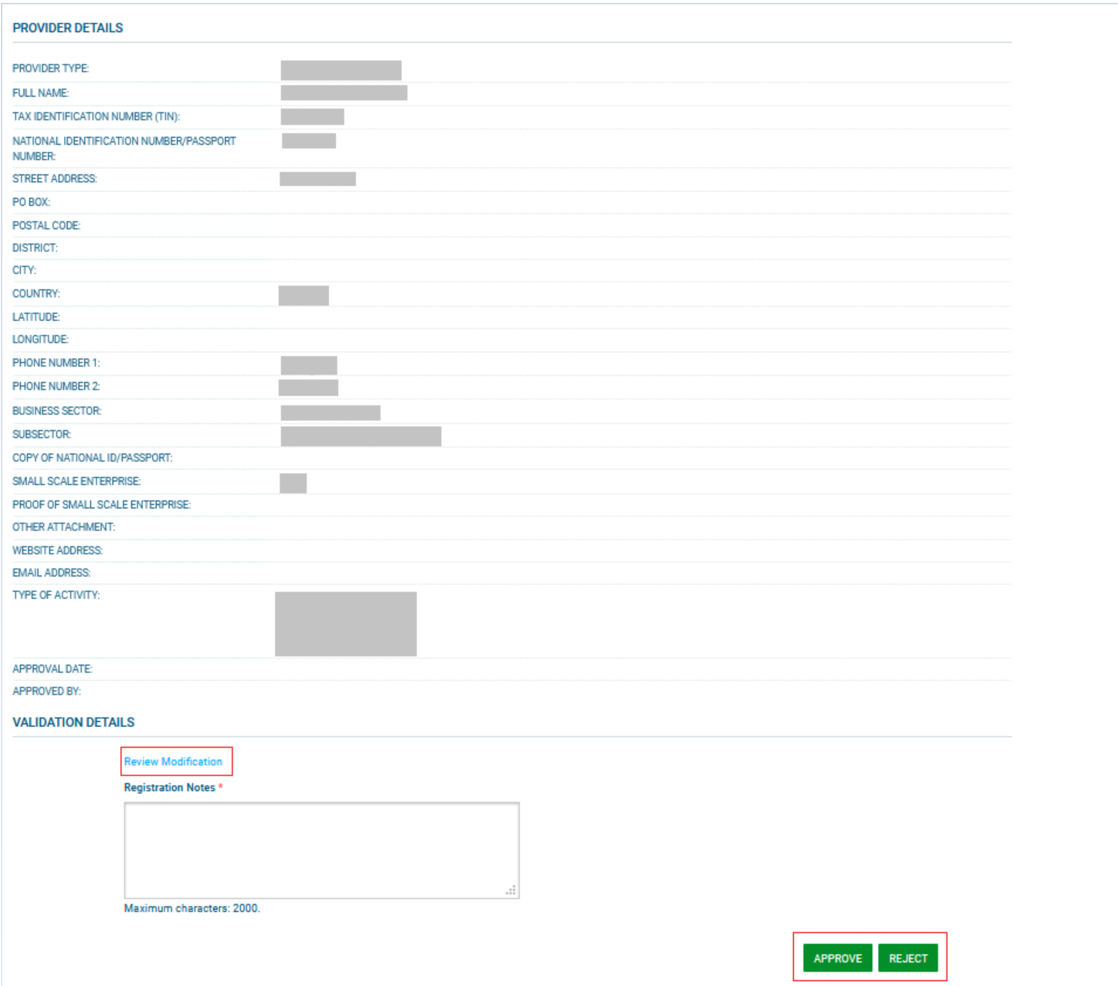


Figure 32: Approve modified Organisation

2.11.8 Child PDE Registration

In case the PDE has a child entity, the PDEA user creates the children of the respective PDE.

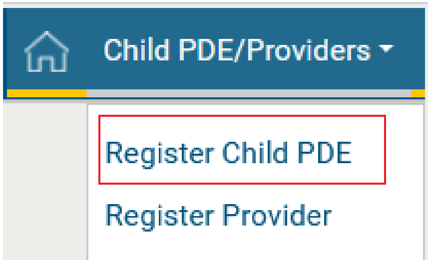


Figure 33: Register Child PDE option

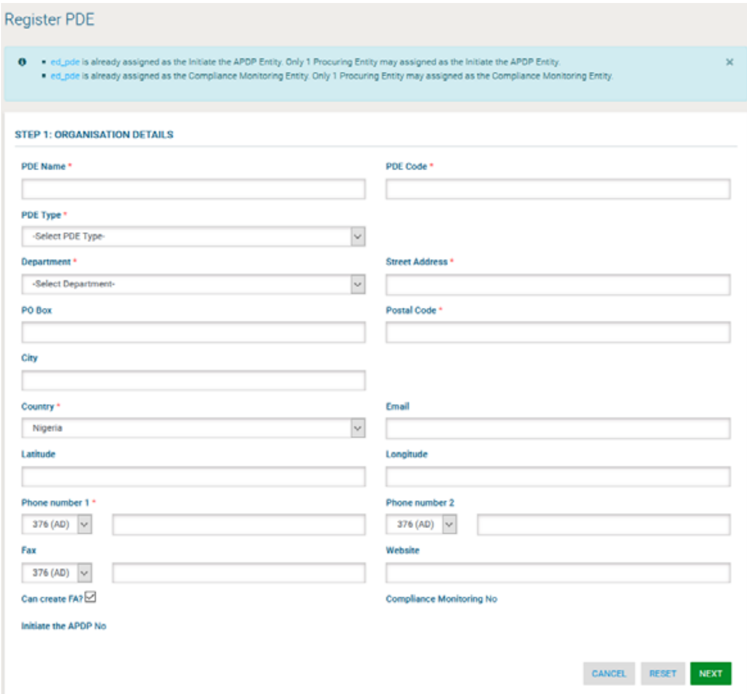


Figure 34: Register Child PDE page

New Sub AO and Sub HF user roles will be added under each "child" PDE organization. Such users have similar access rights to the AO and HF users of the parent entity. The "child" entities will not contain the AO/ HF user roles. The PDEA user will be in position to modify a PDE from child to parent and vice versa. Keep a note, that entities with children will have sub AOs and sub HFs where deemed necessary at PDE branch level.

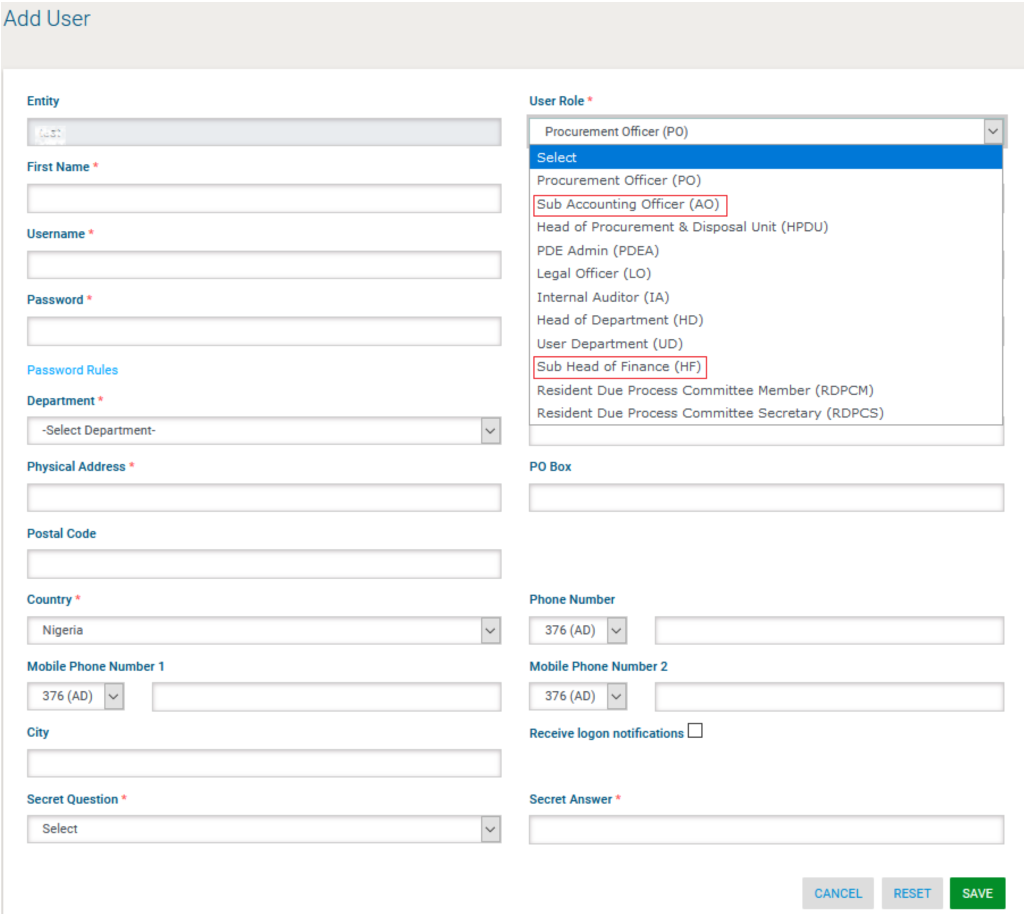


Figure 35: Sub AO and Sub HF user roles

Only one Sub AO and one Sub HF users will be active. The PDEA will select the "Active" Sub AO and Sub HF users of the PDE.

2.12 Searching Functionality

The eGP system provides both simple and advanced search mechanisms. Both functionalities allow searching for Processes, Organisations, Users and Annual Procurement and Disposal Plan entries, always according to the view rights each user has.

2.12.1 Simple Search

The simple search functionality covers searching for available processes, registered Organisations, registered Users and published Annual Procurement and Disposal Plan entries.

Simple search queries are performed by:
Selecting the type of searching (Processes, Organisations, Users and Plans) from the selection list.
Selecting the button "Search", with the magnifying glass.

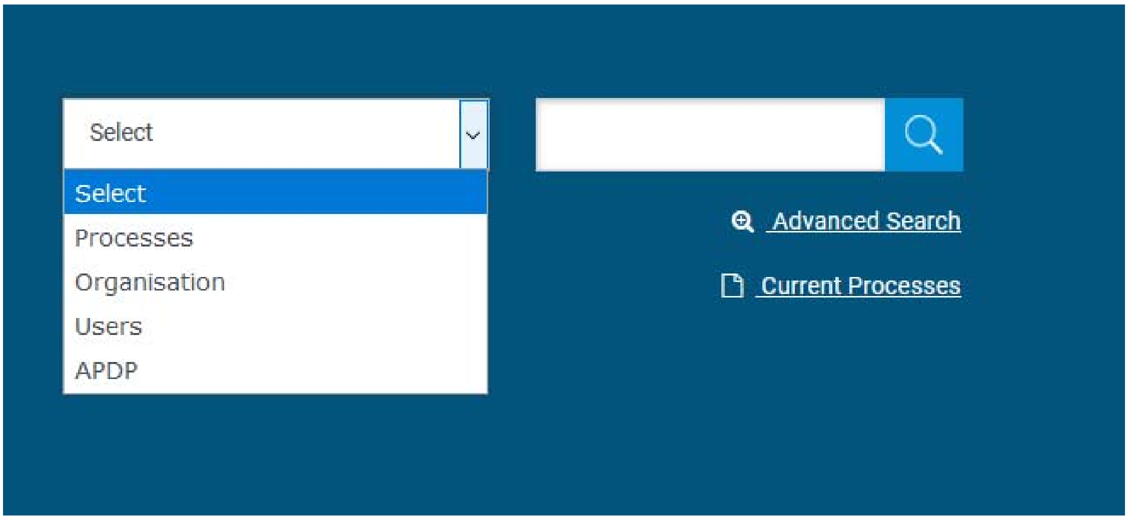


Figure 36: Simple Search Menu

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

Figure 37: Simple search for Organisation

2.12.2 Advanced Search

The advanced search functionality enables searching for Process, Organisation, User and Provider Profiles, depending always what view rights each user has.

Also Annual Procurement & Disposal Plan entries. In addition, the functionality supports searching Organisations that fulfil a specific provider profile. In order to perform an advanced search query, the user should:

Select the type of the search by using the appropriate button.

Provide information in one or more fields

Select the button “Search”

For further information on each criterion select the respective info icon

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

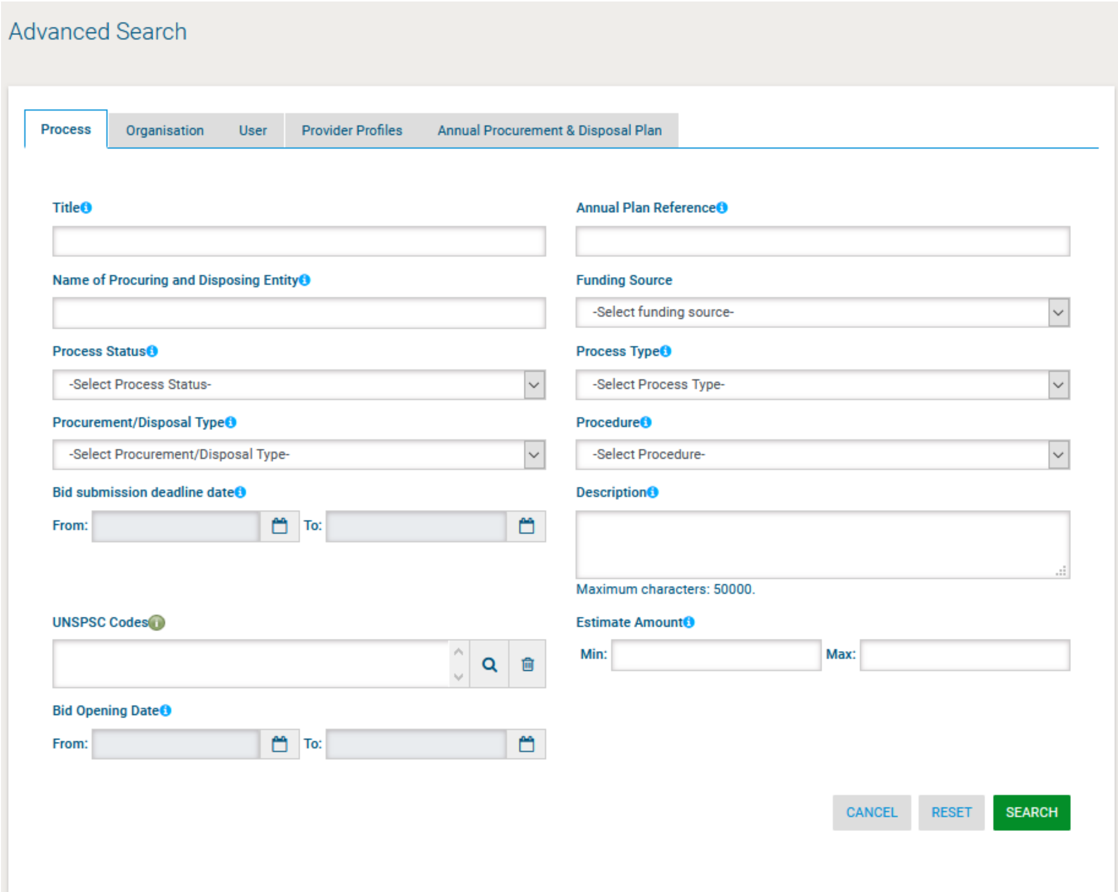


Figure 38: Advanced search for a Process

In order to search for an organisation, the user needs to first provide the organisation type (Procuring and Disposing Entity/ Provider).

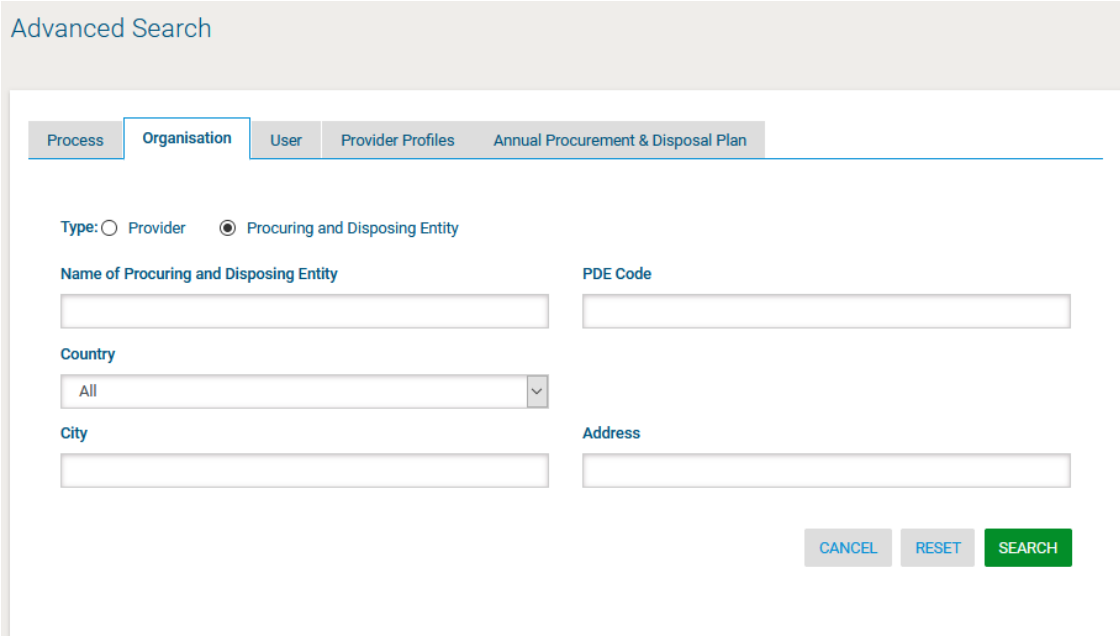


Figure 39: Advanced search for a Procuring and Disposing Entity

In order to search for a user the organisation type (Procuring and Disposing Entity or Provider) must also be selected.

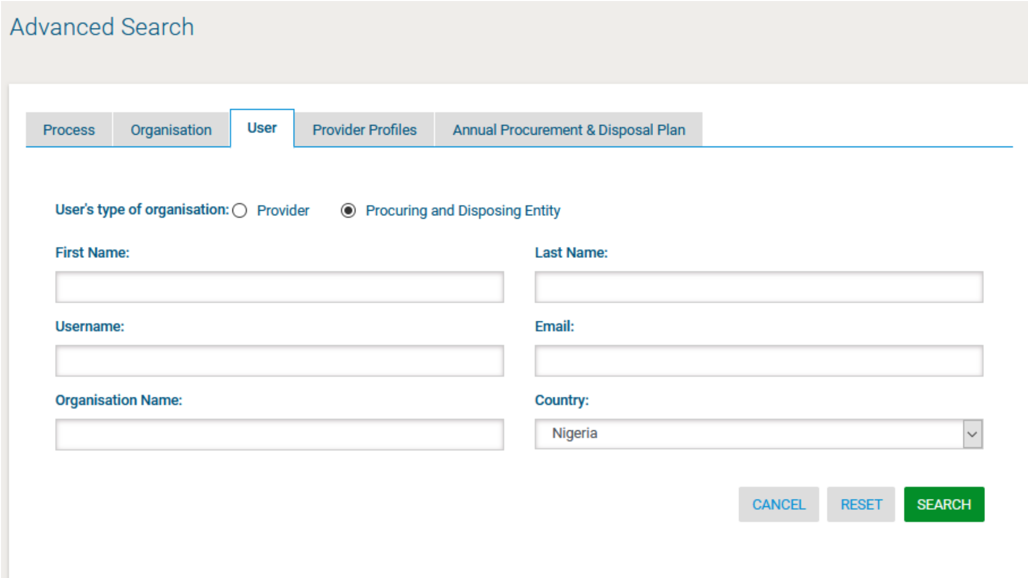


Figure 40: Advanced search for Procuring and Disposing Entity users

Annual Procurement & Disposal Plan entries can be filtered by any combination of the publication date, the procurement type, the procurement method, the UNSPSC code or the procuring entity.

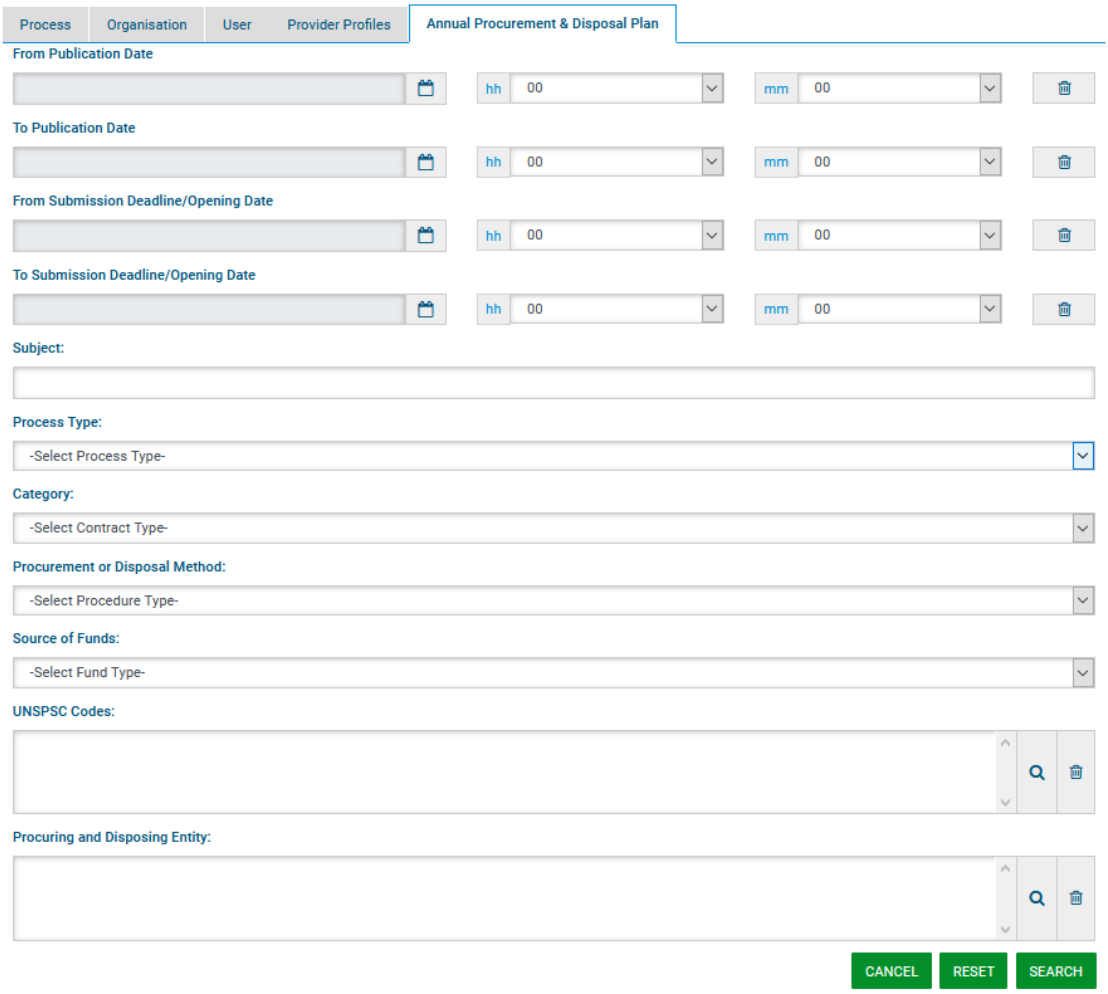


Figure 41: Advanced search for an Annual Procurement and Disposal Plan entry

2.12.3 Current Processes Search

In order to view the Current Processes published within the service, the user can click on the "Current Processes" link, as depicted in Figure 42. This will automatically present the list of the latest processes that are available to the user (depending on his/her access rights).

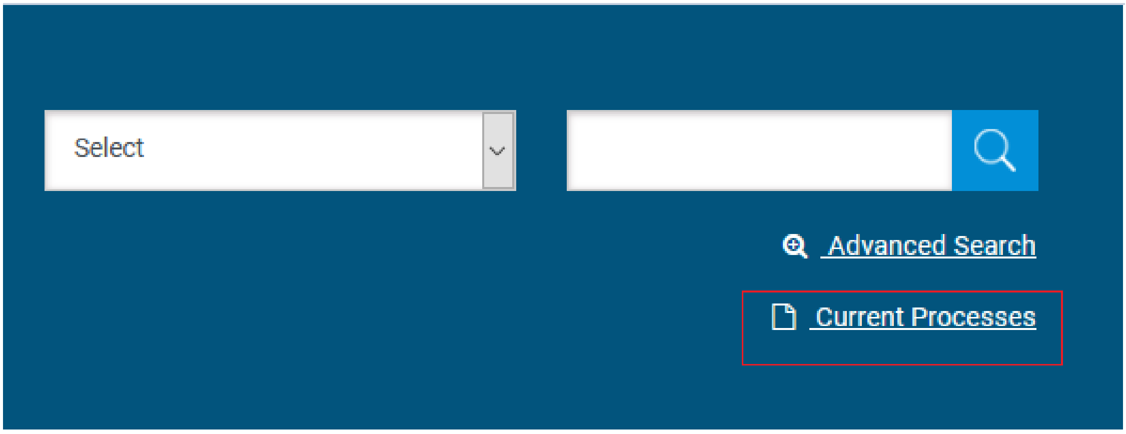


Figure 42: Current Processes search

3 Prior Information Notices

Prior information Notices are managed through the "PDE Notices" menu item displayed in the "PDE Administration" section. Selecting this option, the HPDU and the AO can create the Prior Information Notice

3.1.1 Creation & Publication of a Prior Information Notice

As an HD or an HPDU user, navigate to the depicted menu.

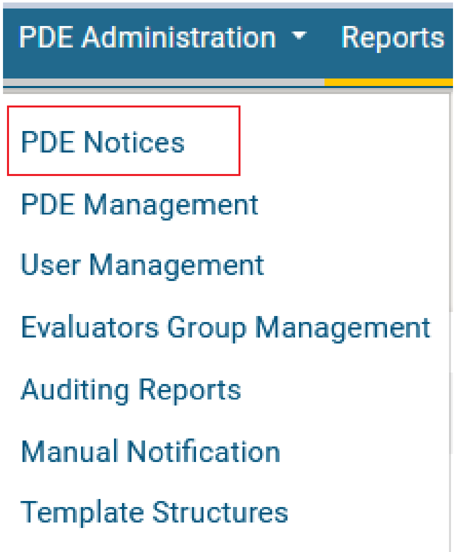


Figure 43: Prior Information Notices section

From the Prior Information Notice page, the user can continue with the following activities:
Create a Prior Information Notice
Delete a Prior Information Notice
Edit a Prior Information Notice
Publish a Prior Information Notice

To create a new notice click on the "Create Notice" button.

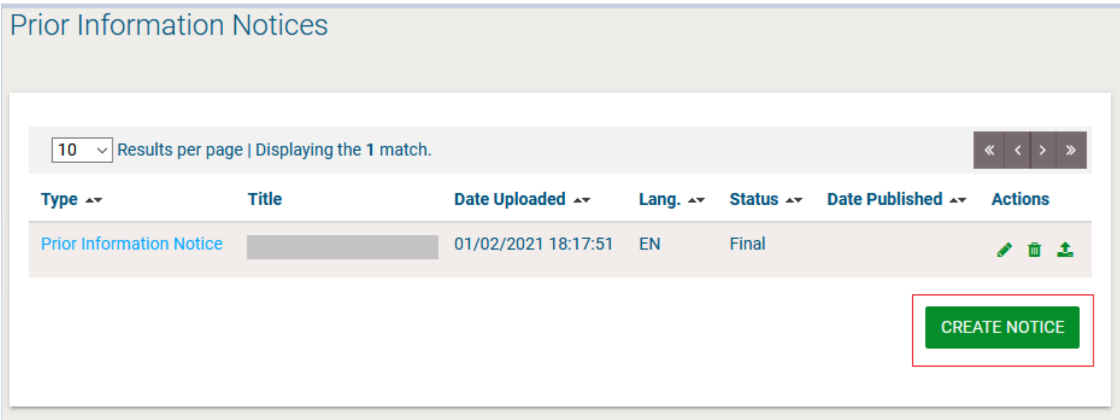


Figure 44: Prior Information Notice

The System will pop-up a new window with the Prior Information Notice as the only available option, the user needs to select it (i.e. clicks on the Select button) and then enter the respective form by clicking the "Forms module" button.

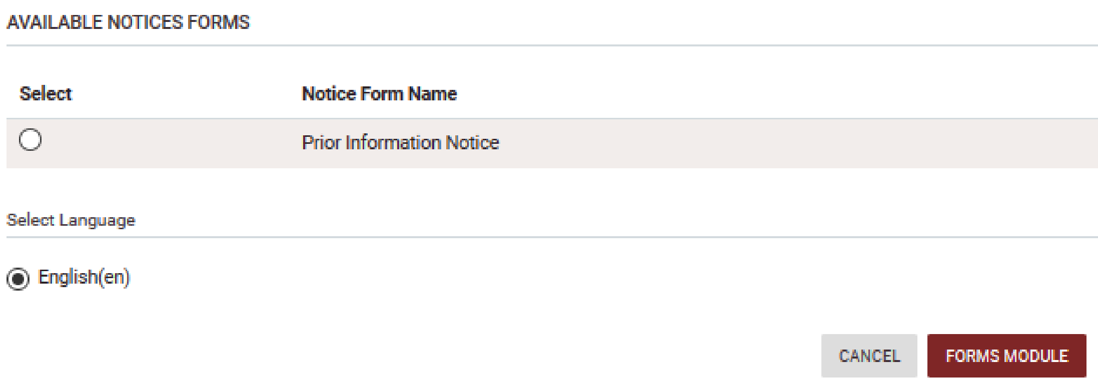


Figure 45: Select Notice Form

User needs to fill in the mandatory information and click “Next”.

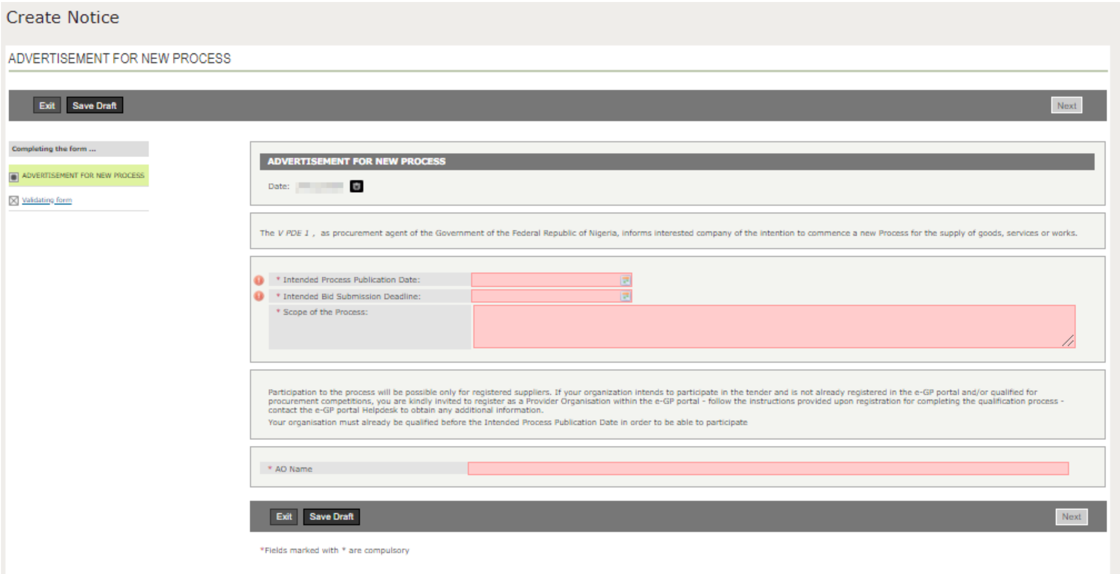


Figure 46: Populate Prior Information Notice

In the final screen the user saves the form as final and the system generates the Prior Information Notice that is ready to be published.

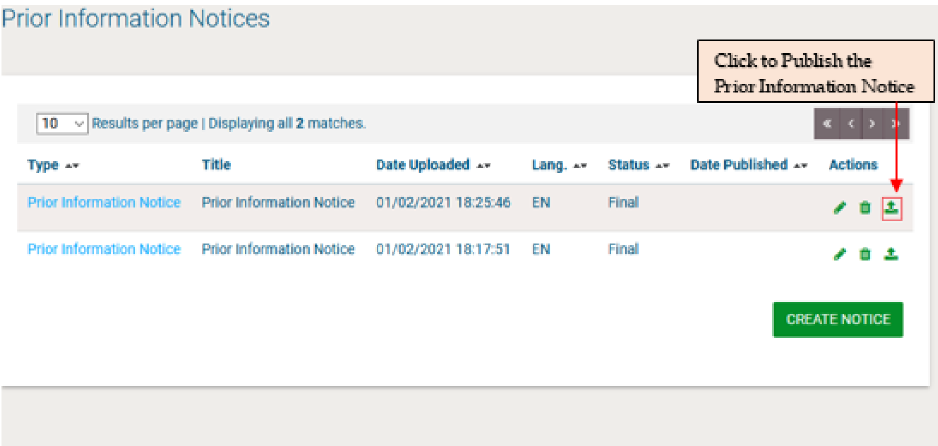


Figure 47: Publish Prior Information Notice

User clicks on "Publish notice" button in order to make the notice available to all Providers.

3.1.2 Editing of an Prior Information Notice

A created but not published Prior Information Notice can be edited by the user prior to its publication by pressing the "Edit" Button . The system will present to the user the respective form, pre-filled with the original data. The user may perform any changes before saving the Prior Information Notice as draft/final.

A created and published PIN cannot be edited. Instead, a new PIN must be published, which corrects the content of the initial one. The user can select the PIN that should be edited and click on the "Edit" button. The system will present to the user the respective form, pre-filled with the original data. The user may perform any changes before saving the PIN as draft/final. Until the corrected PIN is published, users will still only have access to the already published version of the PIN. Upon publication, the new form will be available for end-users, in order to be informed about its new contents.

3.1.3 View all Prior Information Notices

All The PINs which their opening dates have not been passed, will be displayed in the "Prior Information Notice" page.

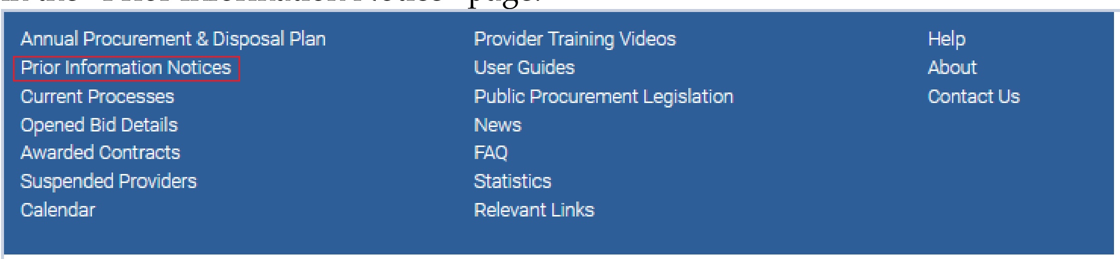


Figure 48: Prior Information Notices (1)

Figure 49: Published Notices

3.2 Annual Procurement and Disposal Plan (APDP)

The Annual Procurement and Disposal Plan process is a prerequisite for the initiation of a new Process.

3.2.1 Create New Cycle of an Annual Procurement and Disposal Plan

The AO user of the organisation that has the "APDP manager" flag set (i.e. Ministry of Finance) will assign a response deadline for the completion of the APDP for all the PDEs.

Each PDE Department will fill in the provided template with its planned procurements for the next year and submit it through the e-GP system.

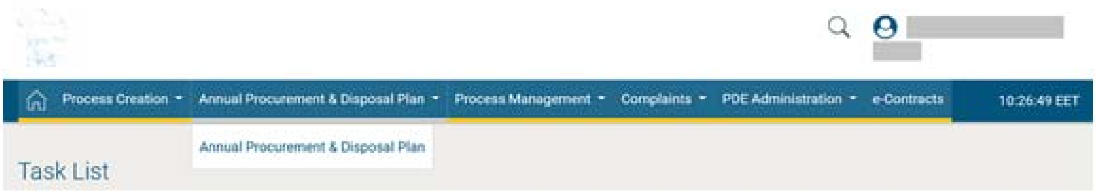


Figure 50: APDP Section

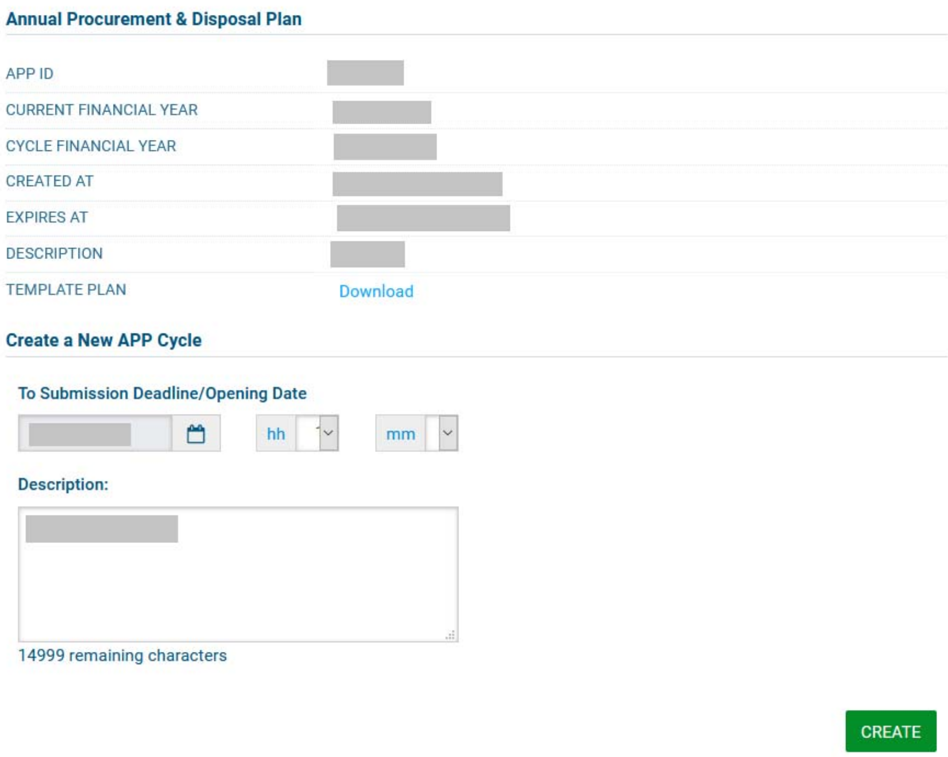


Figure 51: Create New APDP Cycle

3.2.2 Submit Annual Procurement Plan

HD or HPDU users of each Department will populate the "Annual Procurement and Disposal Plan" form, by adding a new row in the form for each Procurement or Disposal to be included in the procurement and disposal plan.

Figure 52: Annual Procurement Plan link

HD or HPDU users will be able to respond to the APDP through a new page available on the top menu under "Annual Procurement and Disposal Plan" section, titled "Annual Procurement and Disposal Plan", or through the dedicated task "Respond to annual procurement and disposal plan request" available on their task list.

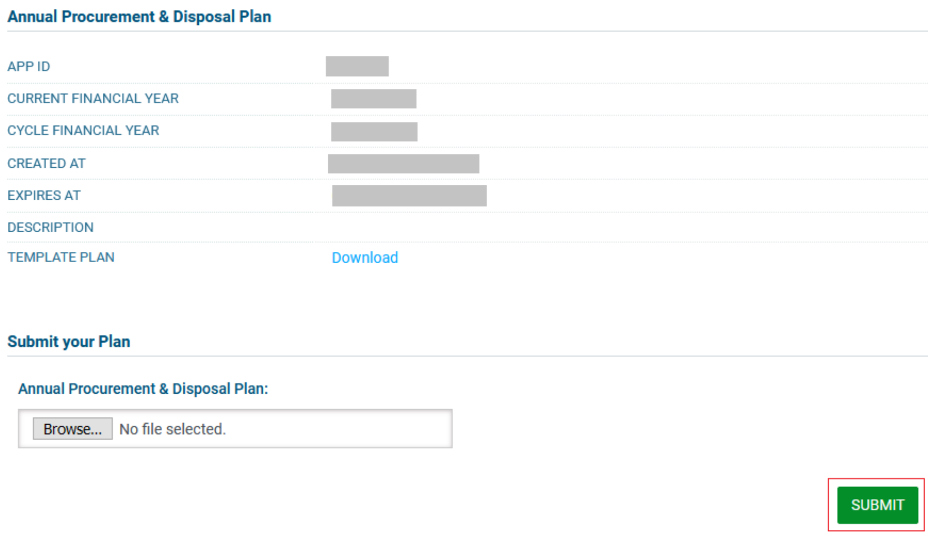


Figure 53: Submit APDP response

HD or HPDU users will insert all their APDP entries via a submission form (manual and online), directly into the e-GP system.
The aforementioned form of the APDP will follow the structure used in the existing e-GP system.

HD or HPDU users of each PDE will populate the "Annual Procurement and Disposal Plan" form, by adding a new row
a) in the online form for each procurement or disposal to be included in the procurement and disposal plan (see Figure 54, Figure 55 and Figure 56),
b) in the excel downloaded from the APDP page (see Figure 57 and Figure 58).
After the Submission, the APDP will be under the Submitted Plans Section, of the Annual Procurement and Disposal Plan page.
Below, you can see the two different ways available for the APDP Submission.

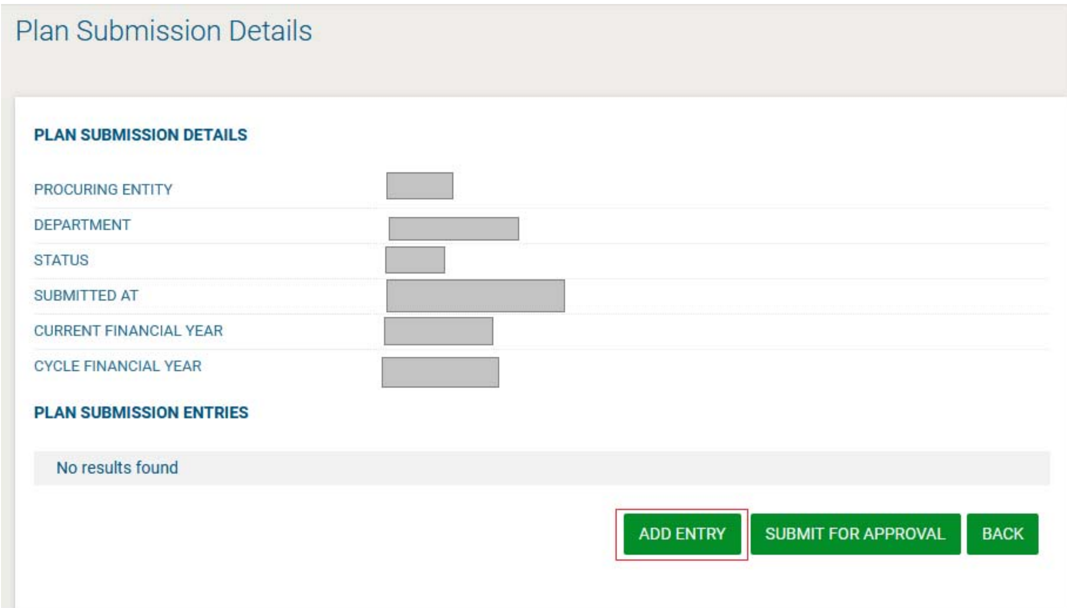


Figure 54: How to complete the online form – Add Entry (1)

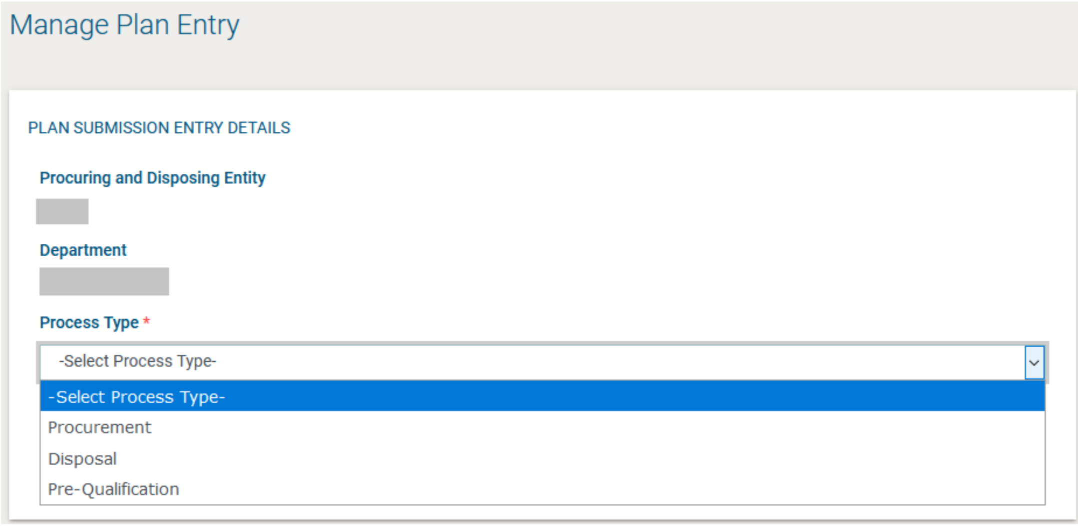


Figure 55: How to complete the online form (2)

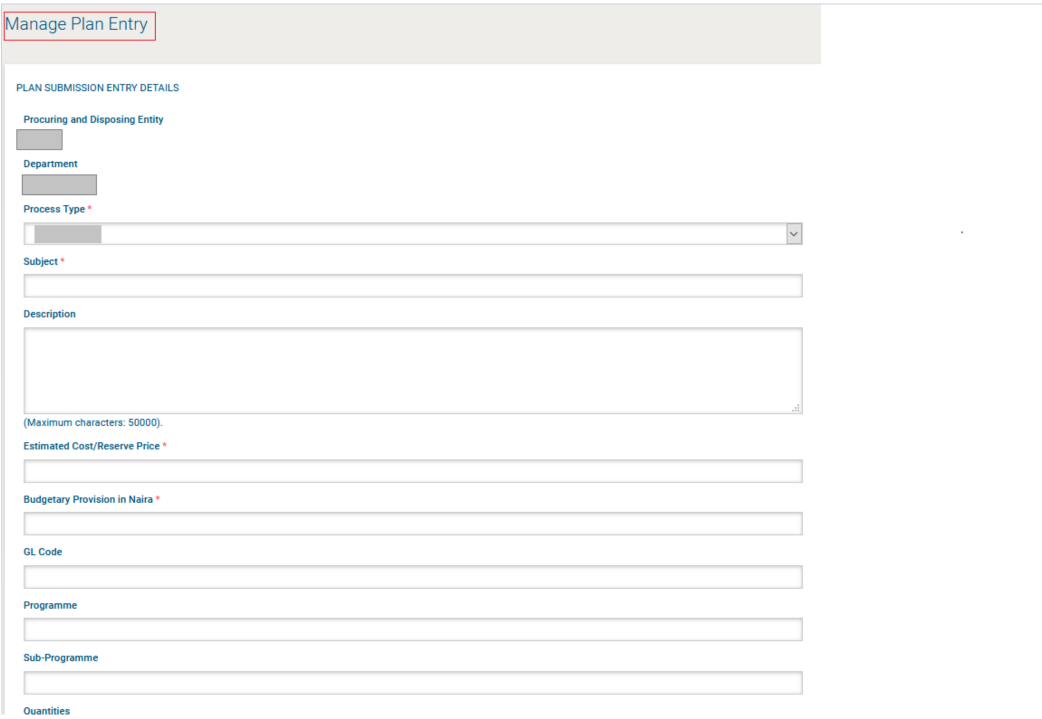


Figure 56: How to complete the online form (3)

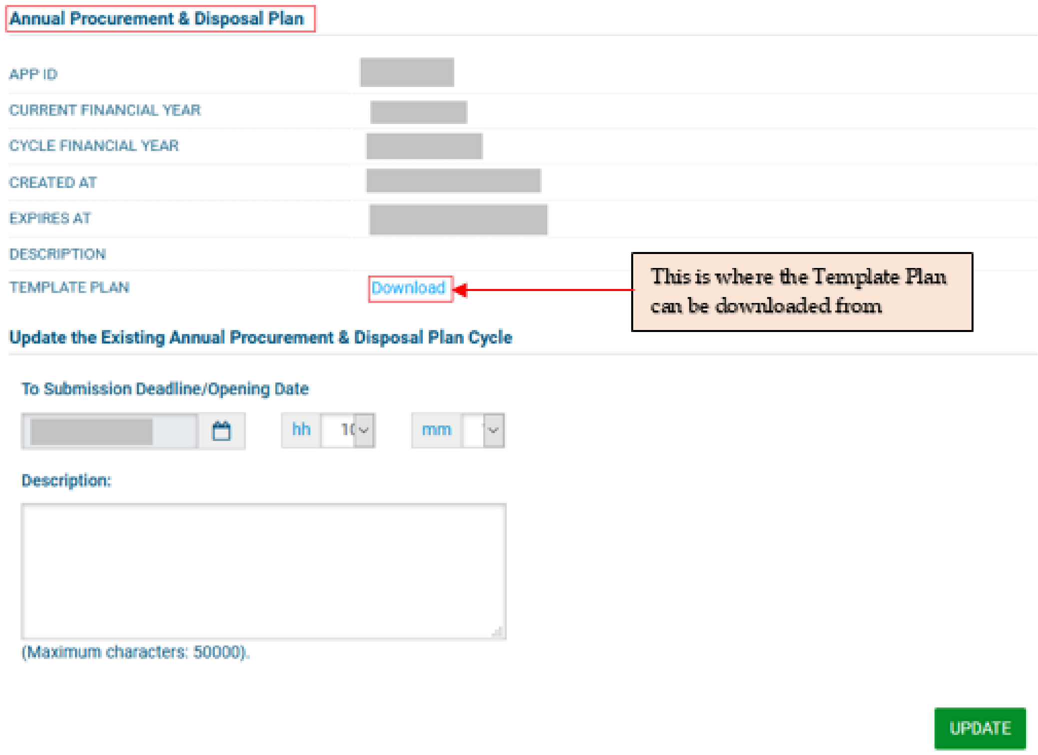


Figure 57: Template for the Annual Procurement and Disposal Plan

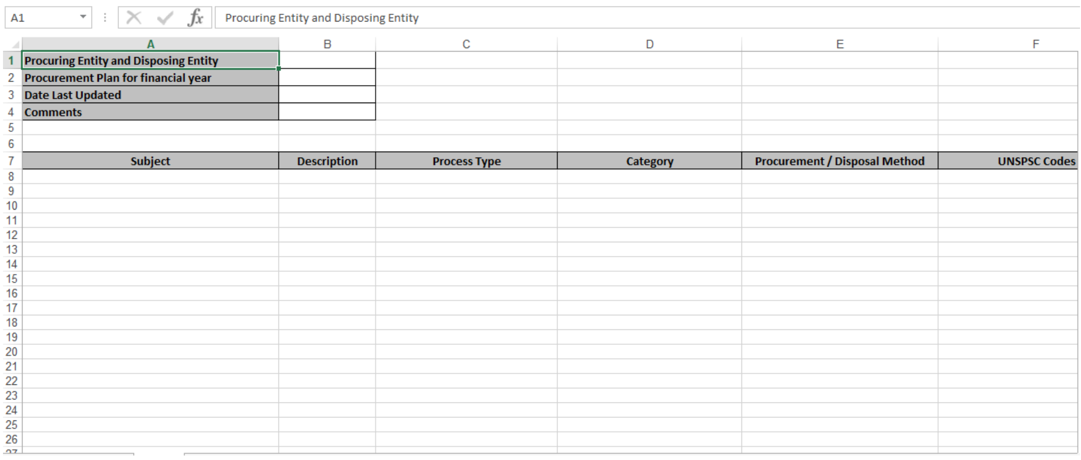


Figure 58: Template to be filled in for the APDP.

The following information will be provided by the HD or HPDU for each entry:

- Procuring and Disposing Entity
- Department
- Process Type
- Subject of Procurement or Disposal
- Description
- Estimated Cost/Reserve Price
- Budgetary Provision in Naira
- GL Code
- Programme
- Sub-Programme
- Quantities
- Source of Funds
- Justification
- Feasibility Studies/Condition Survey
- Awarding Authority
- Contract Type
- Category
- UNSPSC Codes
- Project Commencement Date
- Completion Date
- Contract Signing Date
- Advertisement Date
- Bid Closing/Opening Date
- Approval of Evaluation Report
- Award Notification Date
- Preparation of designs, drawings and Specifications
- Preparation of Tender Documents
- Issued no Objection Certificate

The HD or HPDU user during the completion of the online form, would have first to "View" the submitted form (see Figure 59), then proceed by clicking on the option "Add Entry" (see Figure 56) and finally, after he completed all the mandatory fields, he will click on the "Save" button.

After browsing for the completed response file (in XLS format), or the completed form, the user should select the "Submit" button. The entity's response is now submitted to the entity managing the APP for review before eventually being consolidated into the national plan.

Upon submitting the completed form, the system will validate the uploaded values, to ensure that it has appropriate structure and that it is possible to be parsed. The following validation rules shall apply:
Mandatory fields for each row are completed;
Validate the procurement or disposal method selected against the thresholds to ensure that an appropriate selection has been made for the particular procurement;

Once the APDP is submitted, the HPDU user has to log in and submit the APDP for Approval.
To do this, the user has to go to the Annual Procurement and Disposal Plan Page, select the "View" option and then on the bottom, the option "Submit for Approval"

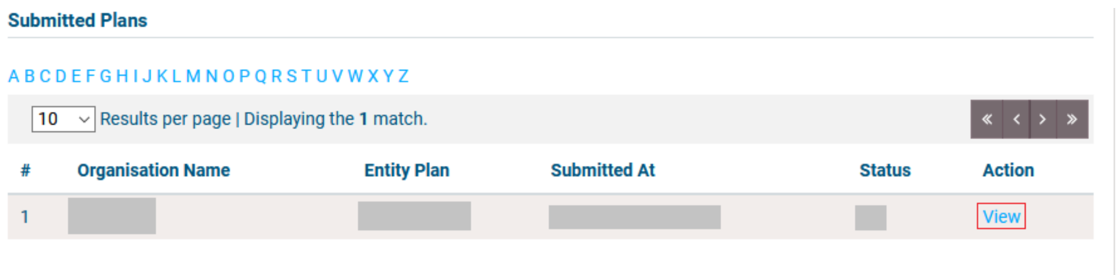


Figure 59: Submit for Approval

3.2.3 Annual Procurement & Disposal Plan Consolidation

Before submitting for approval to the Resident Due Process Committee, the APDP needs to be consolidated. Upon successfully submission of the APDP by HD users, the e-GP system will generate the APDP consolidated XLS file, which will include:
The "Consolidation APDP" worksheet with APDP information.
Individual worksheets of each Department.

3.2.4 Annual Procurement & Disposal Plan Review

Once the Consolidated APDP is generated by the e-GP system, the RDPCS or RDPCM users of the PDE will be tasked to approve the Consolidated APDP.
Upon clicking on the relevant task available on his task list, the RDPCS or RDPCM users will be directed to a page where they will be able to download the Consolidated APDP and review it.
After the RDPCS or RDPCM users review the Consolidated APDP and providing a mandatory comment as well as a mandatory file attachment, the RDPCS or RDPCM user will have the following two options:
"Reject APDP"
"Approve APDP"

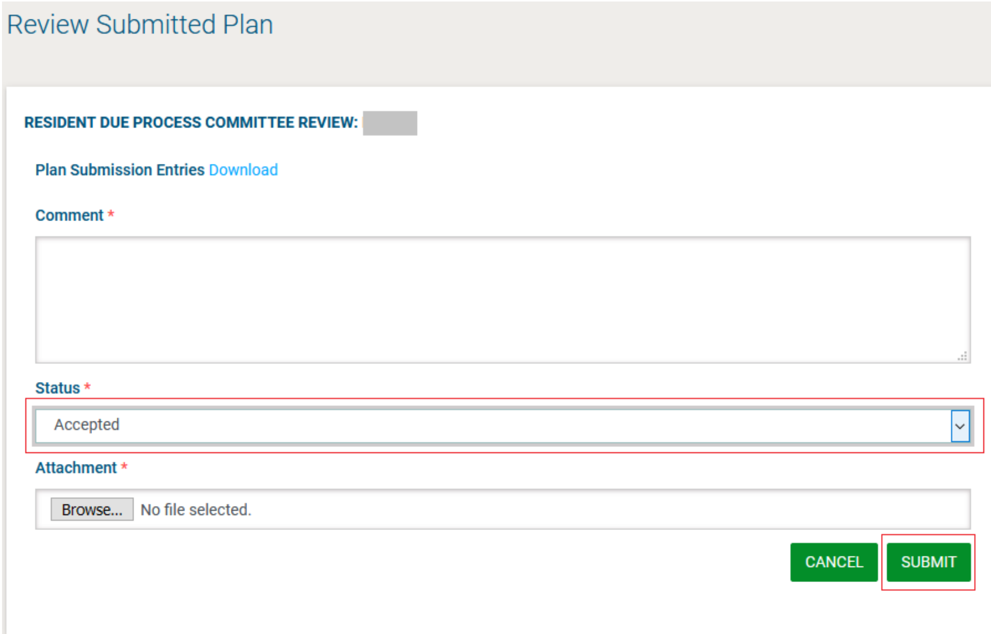


Figure 60: RDPCM/RDPCS user approval

In case the RDPCS or RDPCM users select "Reject APDP", all the HD & HPDU users should be tasked to edit the APDP based on the reason for rejection.

In case the RDPCS or RDPCM users select "Approve APDP", then the AO user of the PDE that initiates the APDP in question will be tasked to approve the APDP. Upon clicking on the relevant task available on his task list, the AO will be directed to a page where he will be able to download the Consolidated APDP and review it.

After the AO user reviews the APDP and providing a mandatory comment as well as an optional file attachment, the AO user will have the following two options:
"Reject APDP"
"Approve APDP"

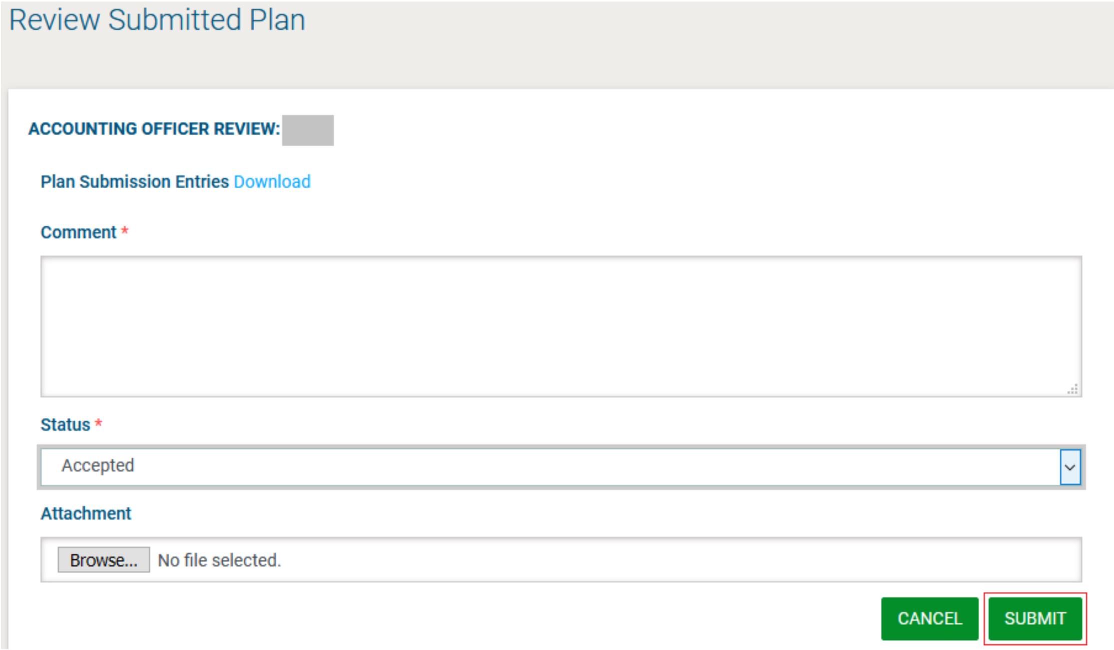


Figure 61: AO user approval

In case the AO user selects "Reject APDP", the HD & HPDU users should be tasked to edit the APDP based on the reason for rejection.
In order for the "Public View" version of the APDP to be published, the APDP needs to be accepted by the AO.

3.2.5 Annual Procurement & Disposal Plan Publication

After the final approval of AO user of the Entity that initiates the APDP, he/she should also proceed with the publication of all the accepted Plans.

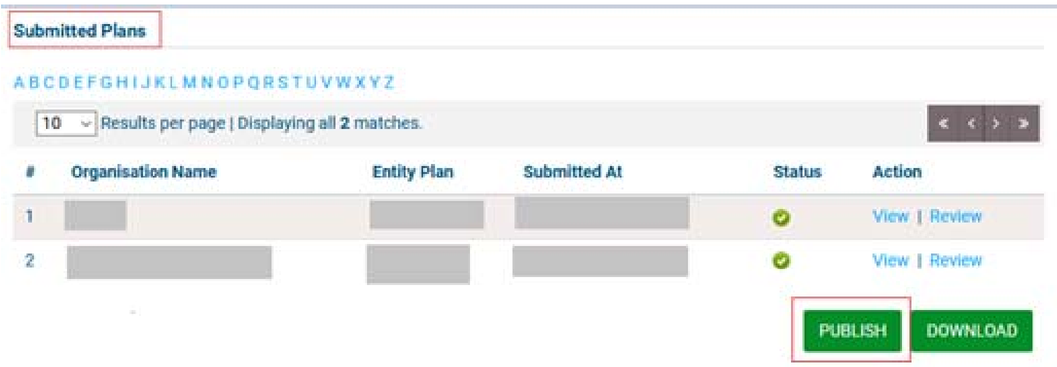


Figure 62: Publish submitted plans

3.2.6 View Published APDP

For the publication of the APDP, all financial columns will always be displayed in public view.
In case a PDE does not respond in time an automated reminder will be sent by the System.
The system will publish one National APDP containing all the planned procurements submitted by each PDE.

Figure 63: Publish APDP

3.2.7 Modify Published APDP

For the modification of a published APDP the AO user of the organisation that has the "APDP manager" flag set has to change his/her decision about the approval or rejection of a published APDP. The AO user selects the Annual Procurement and Disposal Plan option in order to choose the desired published APDP. The AO user changes the option from ''accepted'' to ''rejected''. After the rejection of the plan the HPDU and HD users can perform changes to the APDP.

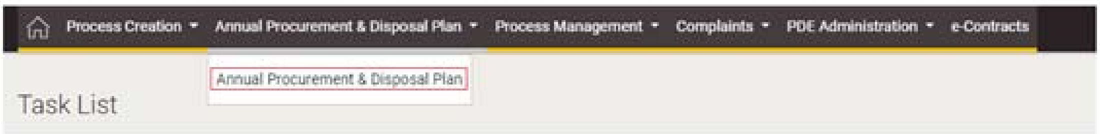


Figure 64: APDP Option

Figure 65: View published APDPs

3.3 Process Workspace

In order to issue a process via e-GP, a process workspace must be created and configured with the appropriate options.

3.3.1 Preparation of a Process

Once the Annual procurement and disposal plan is consolidated and published, the HPDU user may click on the "Create New Process" link, under menu option "Process Creation", in order to initiate the Process creation process. Upon clicking the aforementioned link, the system will automatically re-direct the user to a new page where a form containing the details of the new process will be presented. Some default choices will have been made on the form. The remaining details on the form will need to be completed by the PC user.

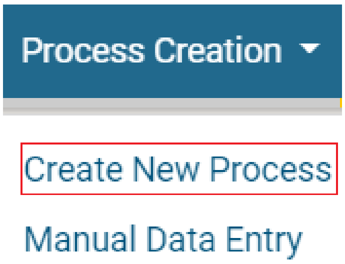


Figure 66: Launch process creation

The user first will need to select the Process Type. He will have to select amongst the options: Procurement, Disposal and Pre-qualification.

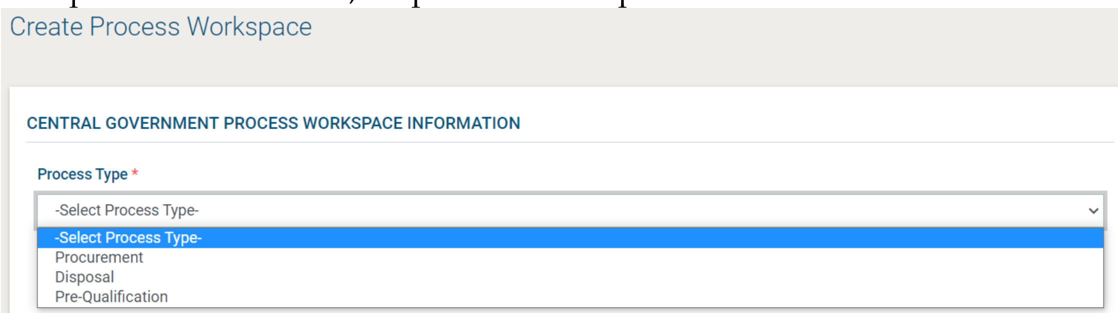


Figure 67: Select Process Type

Then, the user will need to provide all mandatory information.

The user can link the process to an Annual Procurement & Disposal Plan (APDP) by clicking the search icon (Figure 68). The user can only choose from items that his organisation had included in their APDP response. Any information included in the APDP xls file, will be auto-populated in the form. Every APDP entry can be used only once.

To add new items to the APDP in case of an emergency procurement, the steps in sections 3.2.1 - 3.2.5 - 3.2.4 can be repeated after the publication deadline for the APDP has lapsed. The new APDP file provided in this manner will replace the previously published file, so it is important that the user downloads the existing APDP and makes changes to this file rather than uploading a new APDP file containing only the emergency procurement. If desired, this mechanism can also be used to remove entries from the published APDP in case the procurement is no longer required. This will prevent users from being able to launch a process linked to the particular APDP entry.

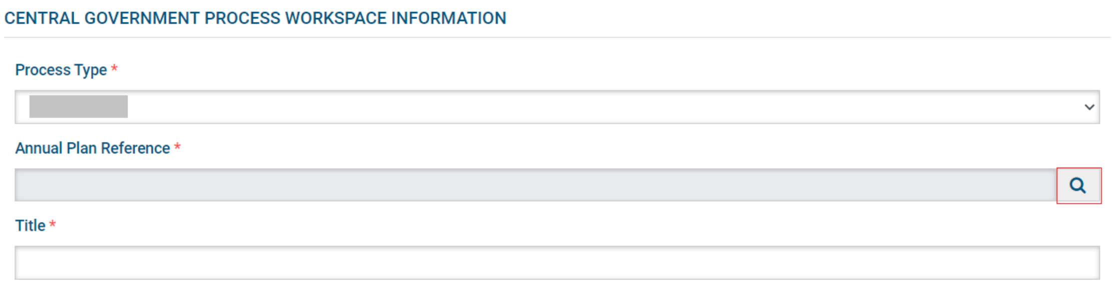


Figure 68: Process Workspace

The APDP entry can be filtered by completing the search criteria on the form before clicking the "Search" button. Leaving all criteria blank will return all the entries of the APDP for the user's procuring entity.

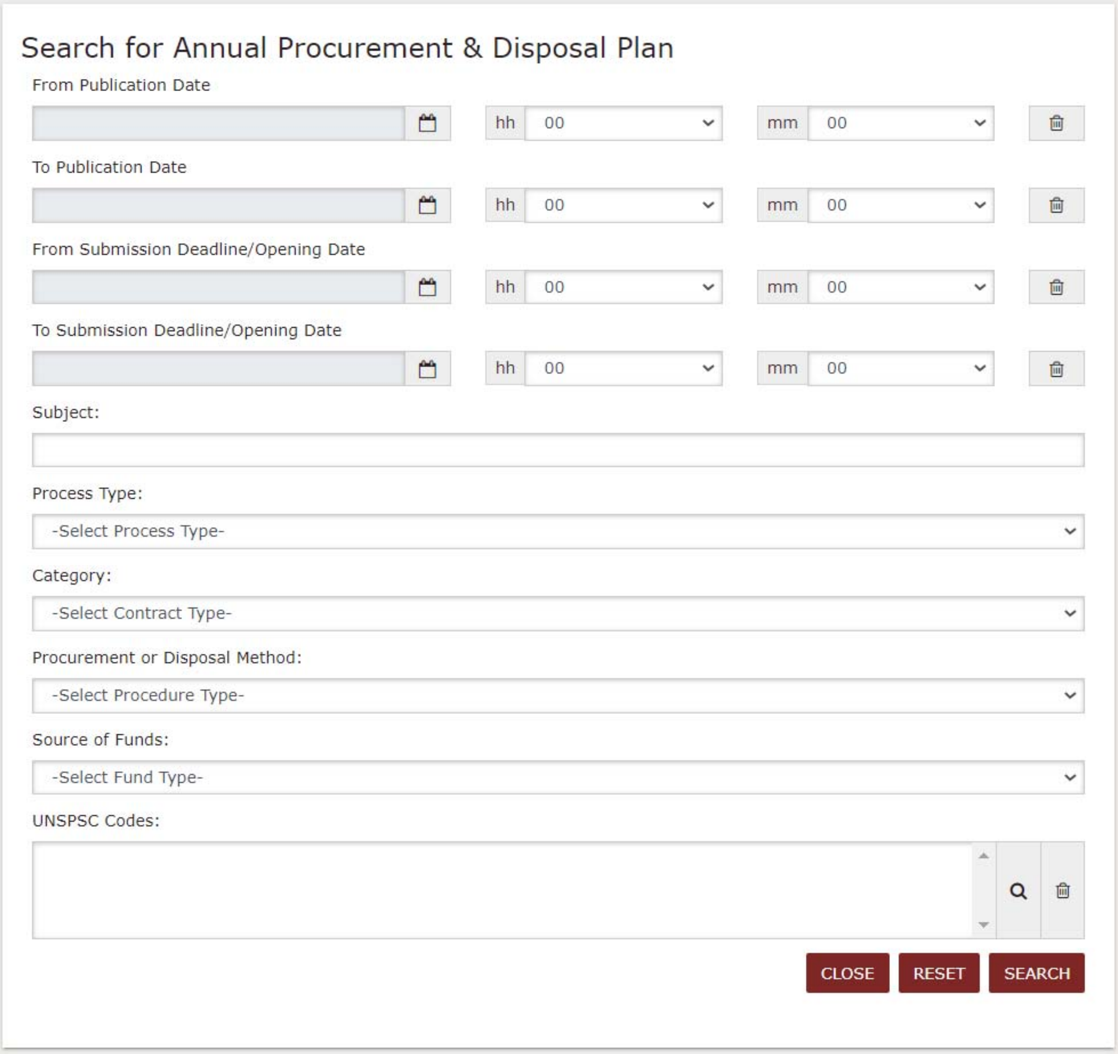


Figure 69: Search for APDP entry to link to process

The user can click on the "View" hyperlink next to each APDP entry to see more details. When the correct entry has been identified, the user must click on the "Select" button to load the information from the APDP into the process workspace.

The user can select only one APDP entry. Furthermore, the user should also set the Estimate Amount.

As you can see in Figure 70, after the user selects an APDP entry, some of the information is auto-populated.

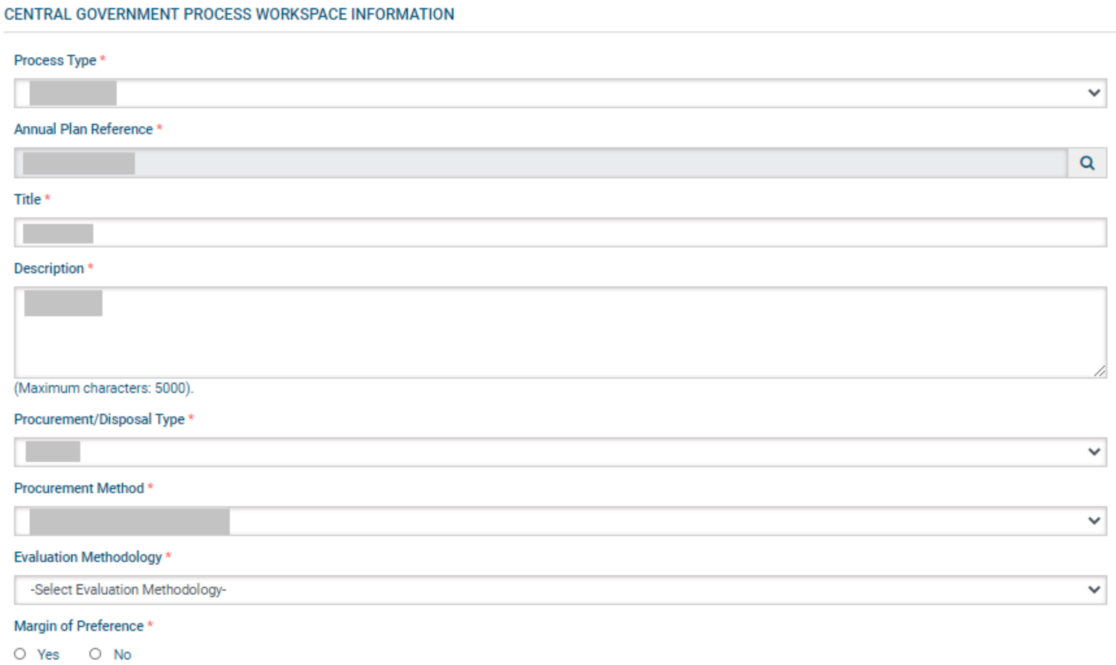


Figure 70: Select APDP entry

The user now completes the remaining details required by the form in order to create the process workspace. Different parameters need to be provided depending on the procurement method and procurement technique applicable to the process.

If the providers are expected to provide a bid security as part of their response to the process, the user can select whether the bid security should be a fixed amount or a percentage of the total bid value. The currency in which the bid security can be provided must also be selected by the user.

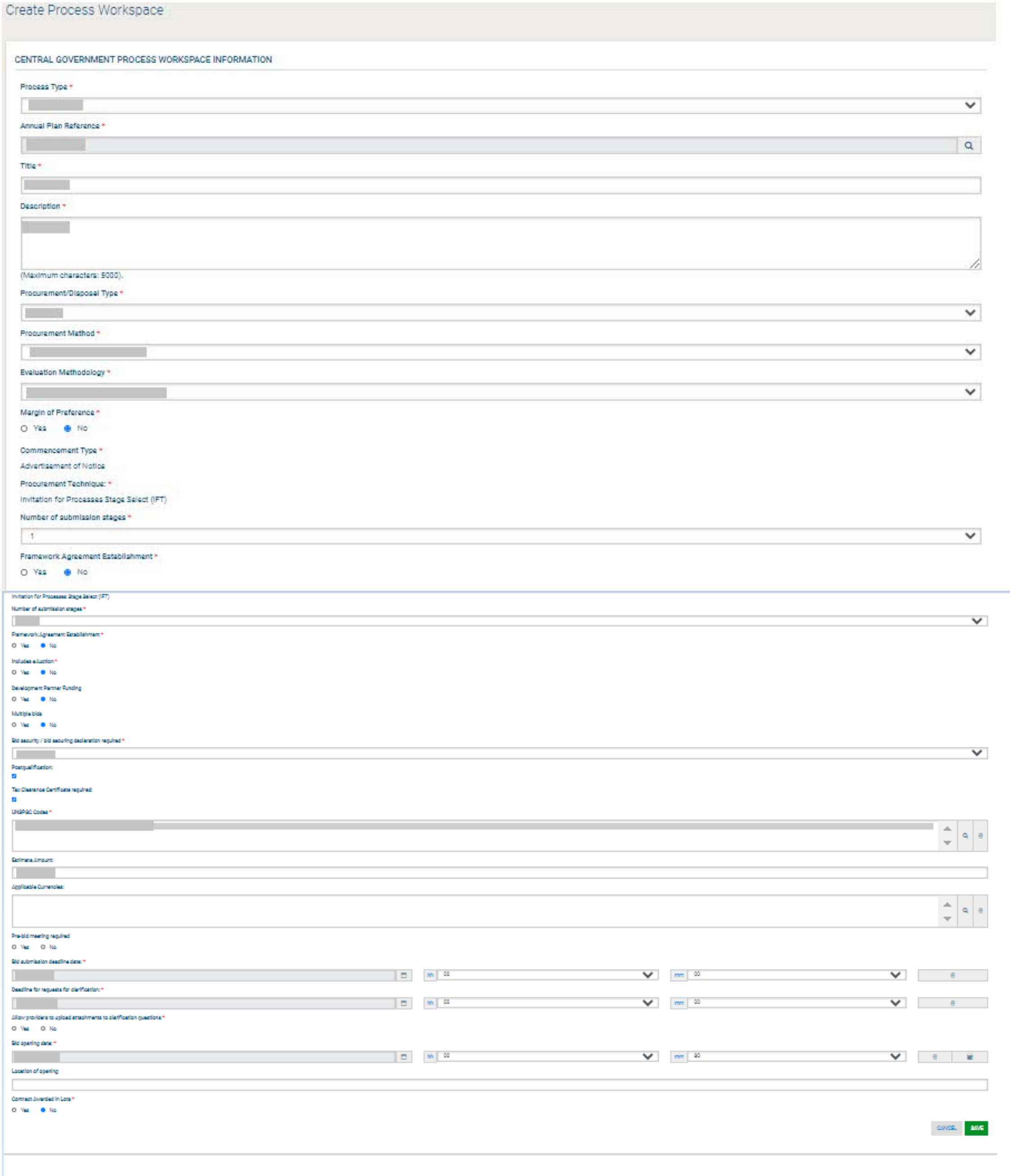


Figure 71: Workspace details populated

Once the user properly populates all required information and clicks on the "Save" button, the system will create the workspace. The user will need to verify the details of the process, before s/he is able to proceed with the publication. That user is required to edit the details (
Figure 72). A respective task will also be available in the user's homepage.

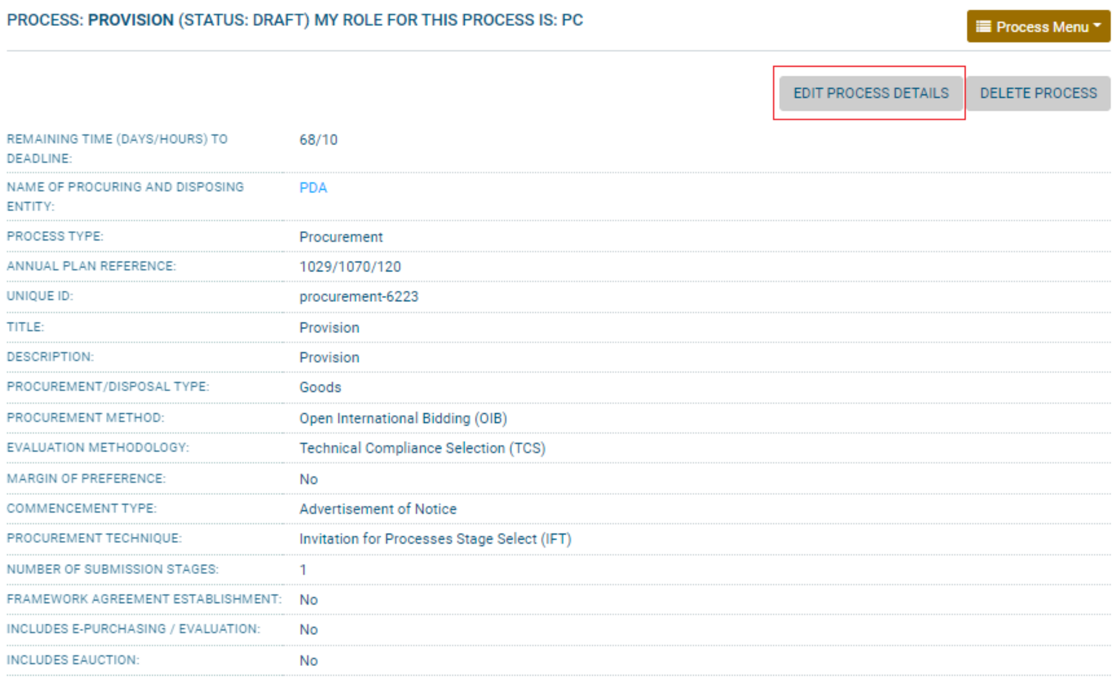


Figure 72: Edit details

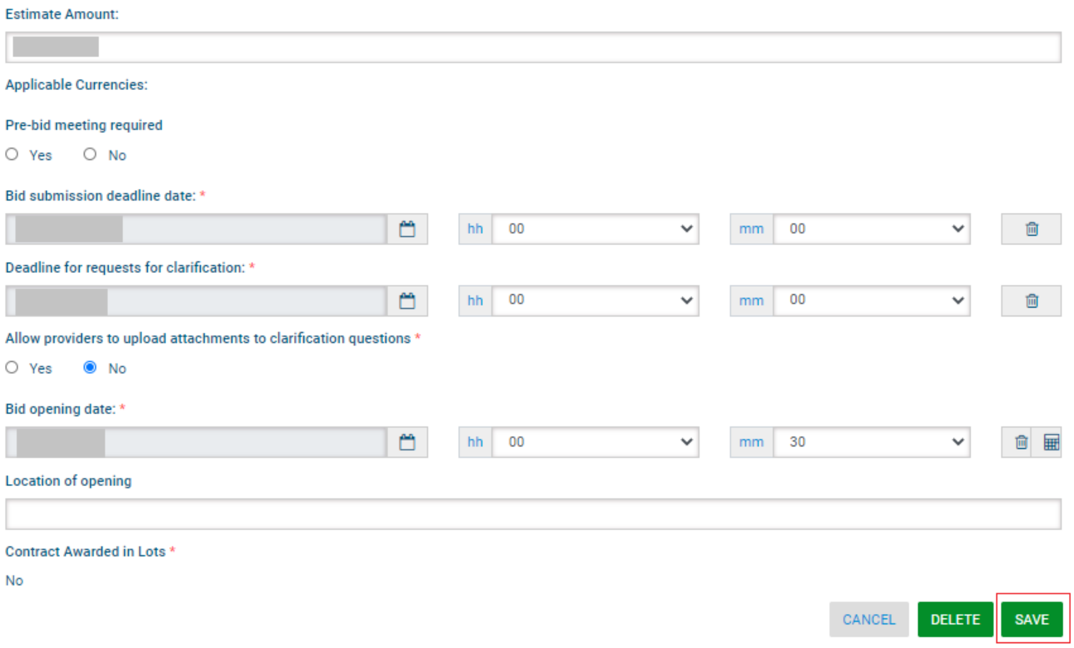


Figure 73: Finalise editing

Some of the details of the process are not allowed to be edited (Figure 73). If the user identifies any errors in these fields, the process workspace must be deleted and re-created with the correct values before proceeding.

3.3.2 Association of Procuring and Disposing Entity Users

In order to continue the procurement process, the user must then associate the following users with the process:

PC. Procurement Officer Process Coordinators (at least 1 user)

OP. Process Openers (at least 2 users)

BEC and BECC. Evaluation Committee. At least one of the evaluators will be associated as chairperson of the evaluation committee BECC. If only a single evaluator has been associated with the process his role must be BECC.

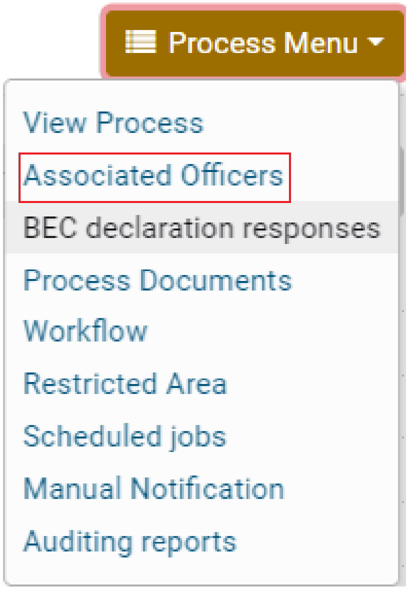


Figure 74: Associate officers

The following user role combinations are also permitted: **PC + BEC.**
The procurement officers assigned with the roles PC and OP should belong to the Procuring Entity where the particular process is published.

By default the creator of the process is assigned with the PC role. However, more than one officers (even from different entities) acting as PC may be associated in the context of a process. Assign a combination of roles and/or select other uses to associate with the specific process.

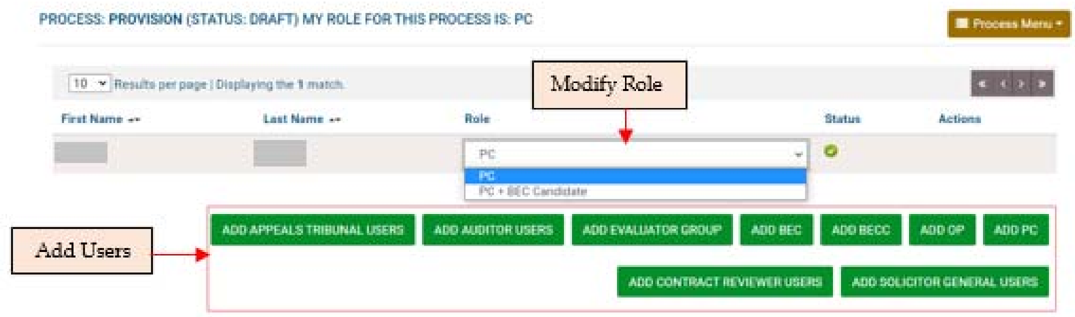


Figure 75: Define roles

System will offer a specific facility to search for users that are eligible for association with a specific role.

Figure 76: Search for user to be associated with a specific role (1)

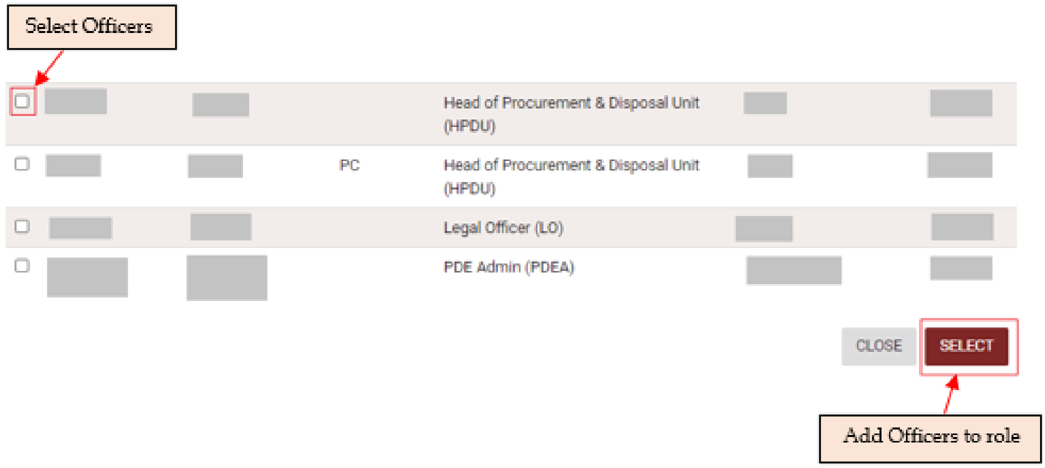


Figure 77: Search for user to be associated with a specific role (2)

The associated procurement officers assigned with the BEC and BECC roles can also belong to other procuring entities.

The users and their roles under the particular process can be modified at any time. Furthermore, a user can be disassociated from a particular process by selecting the "Disassociate" link next to the user's name (Figure 78).

Finally, an evaluator can be replaced at any time during the procurement process (Figure 78). In this case, all completed evaluations (draft or final) will be copied to the new user's workspace. The status of all finalised evaluations will change to Draft, in order to allow the new user to edit and modify these evaluations.

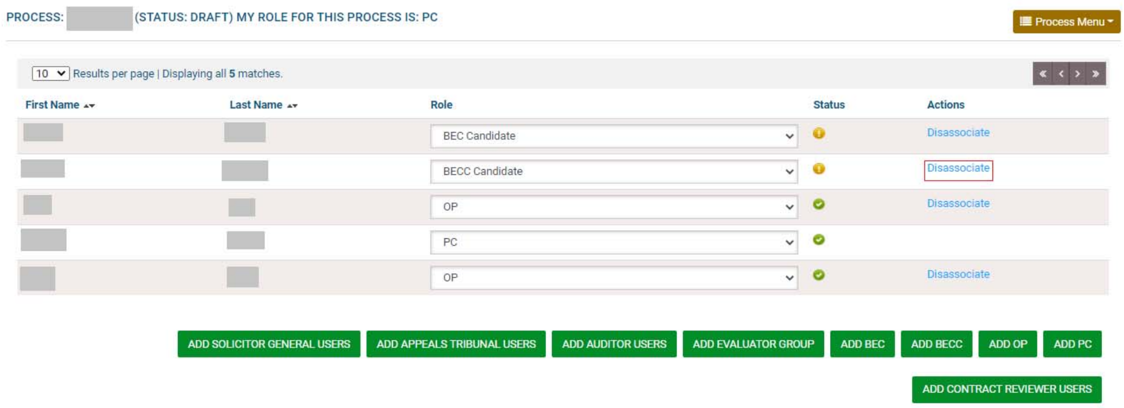


Figure 78: Modifying the role of an associated user

The HPM user is in position to associate PMO users as auditors when clicking the "Add PMO users" button in the “Associated Officers” page, furthermore he is able to associate users from the oversight body as auditors when clicking the existing "Add Auditor users" button.

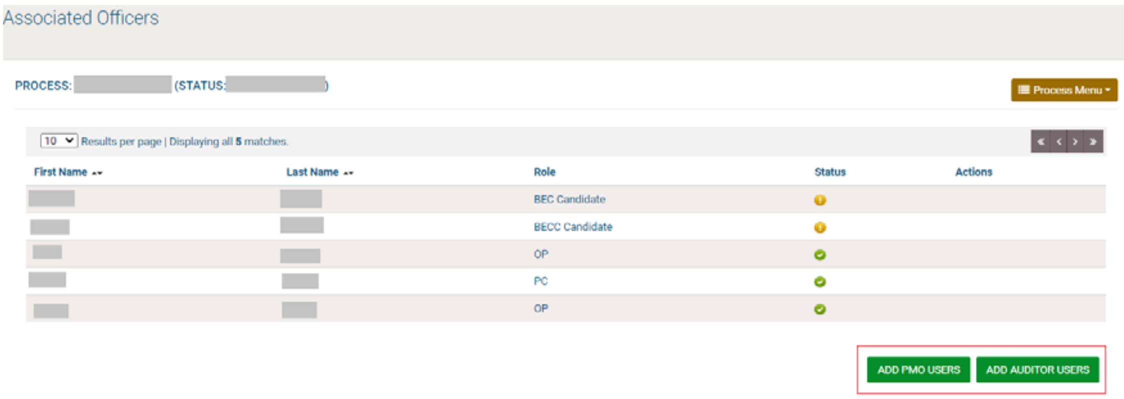


Figure 79: Association of PMO and Auditor Users by HPM user

3.3.3 Process Documents

From the process's menu the users that are allocated the PC role may create, edit or delete the process's documentation.

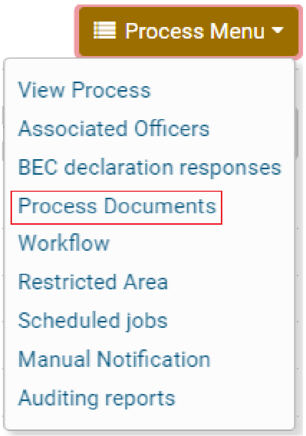


Figure 80: Menu option

The users assigned with the PC role will be able to add and edit the desired documentation as needed.

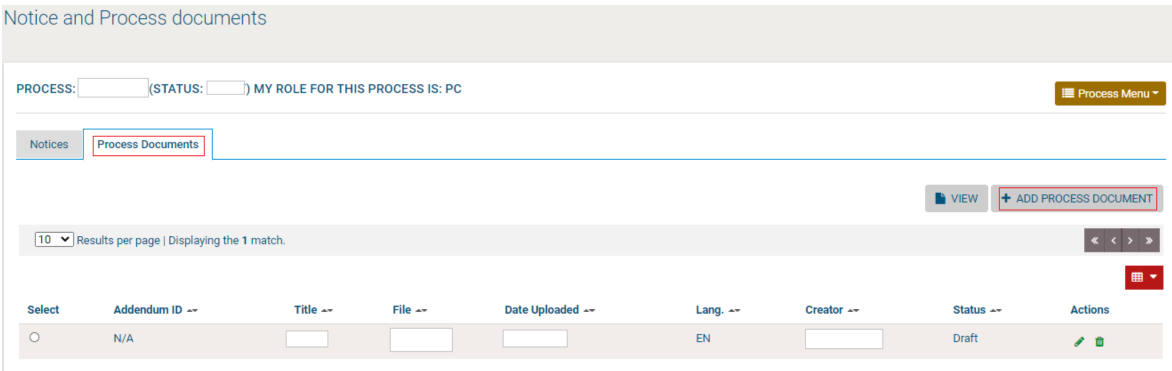


Figure 81: Add process documents

The user may select to automatically upload all documents from a subfolder of the Template Library by clicking the "Create Templates" button. The system will process the request and update the process's documentation accordingly.

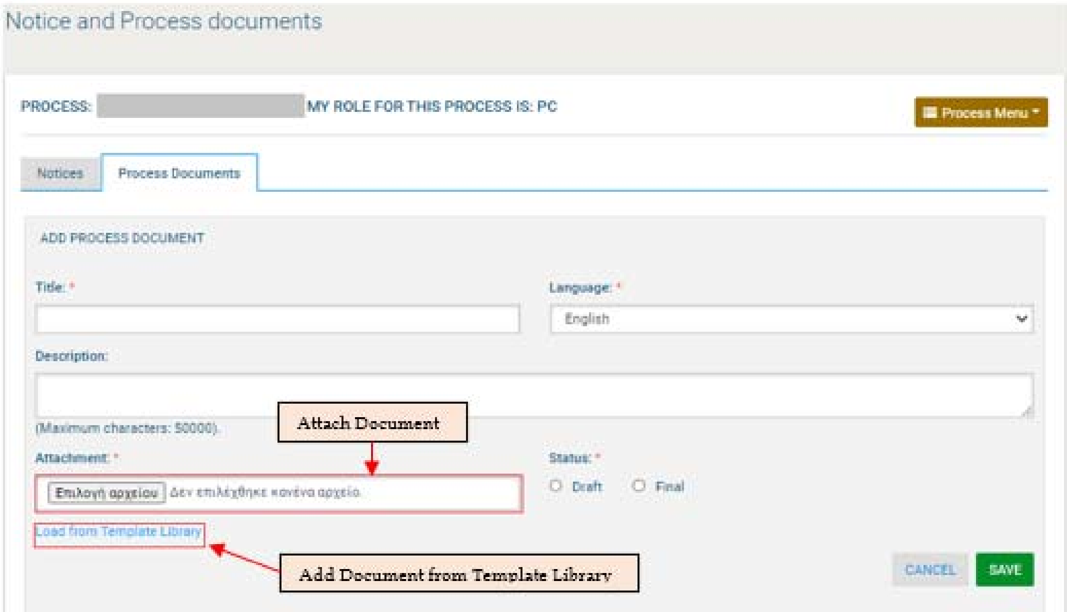


Figure 82: Create/load/edit document

All documentation is created in a draft status. In order for the created documents to be available to the providers after the publication of the process, the PC will need to update all documents and set their status to final. The user clicks the edit button , amends the status of the file and saves the modification.

In order to add other contractual documentation to the process workspace the user should:
Select the "Process Documents" choice from the "Process Menu"
Select the "Process Documents" tab
Select the "Add Process Document" button
Provide the title of the document
Select the language
Provide a description (non mandatory)
Select the file to upload to the system
Select the status of the uploaded file (final or draft)
Select the button "Save Changes"

In order to edit a contractual document the user should press the “**Edit”** button . The system enables the user to upload a new version of the document. The user should provide a textual description of the differences between the current and earlier version of the document. Selecting the button “Save Changes**”** finalises the action.

In order to remove a process document the user presses the “Delete” button . The system always prompts the user to confirm his selection, prior to any deletion.

3.4 Define Workflow

The user defines whether the various steps of the process will be performed online or offline. After the definition of the Process Workflow, no modifications can be applied.

Figure 83: Define Workflow

3.5 Define Evaluation Criteria

The user is tasked to define the Evaluation criteria for the process including weightings for bids requiring evaluation on parameters in addition to price (if the “Define Process Structure (and Awarding Criteria)” step is set to “Online” in the workflow).

3.5.1 Import Criteria

The criteria from a previous process can be re-used, if they are similar to the criteria for the current process, by importing an XML file that defines the criteria. The number of envelopes selected on the form should correspond with that in the XML file.

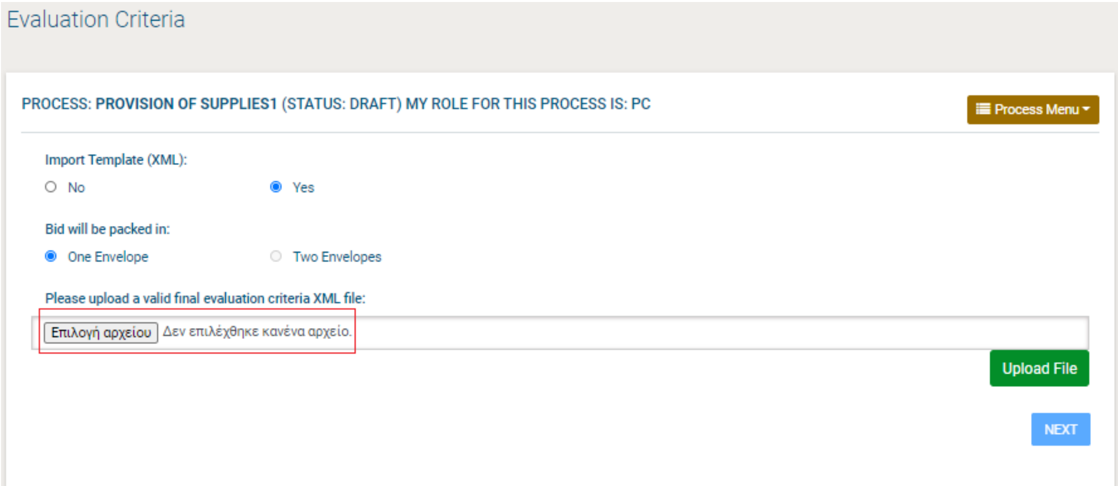


Figure 84: Import evaluation criteria XML file

The evaluation criteria XML file can be located by searching for prior processes in the "Template Structures" option under the "PDE Administration" menu in the main navigation.

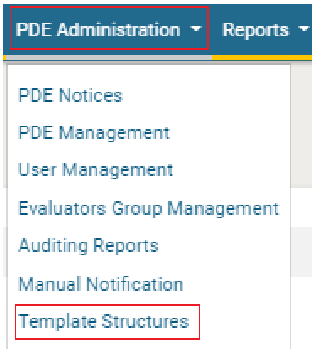


Figure 85: Template structures menu

Selecting this menu item provides the user with a search screen. After completing the search criteria the user clicks on the "Search" button to retrieve all processes (across all procuring entities) that correspond with the criteria. If a large number of results are returned the search criteria may need to be refined further to the narrow the results.

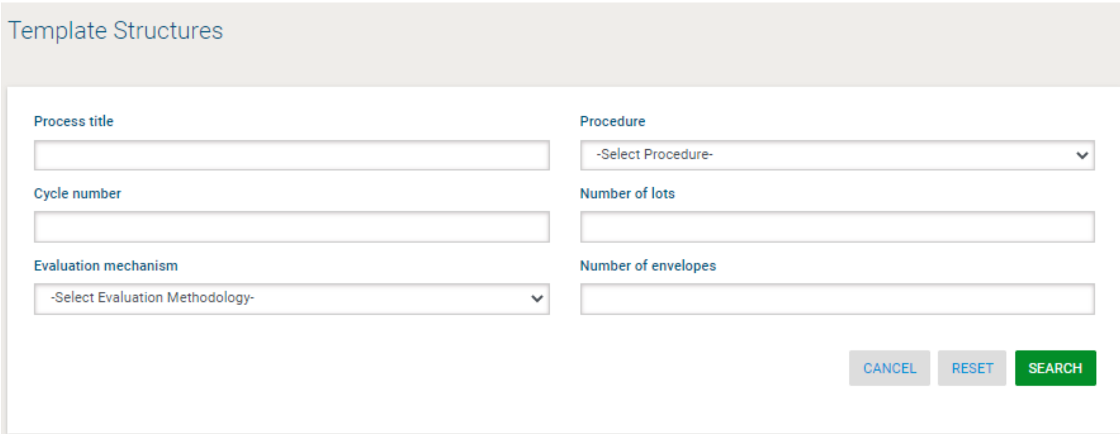
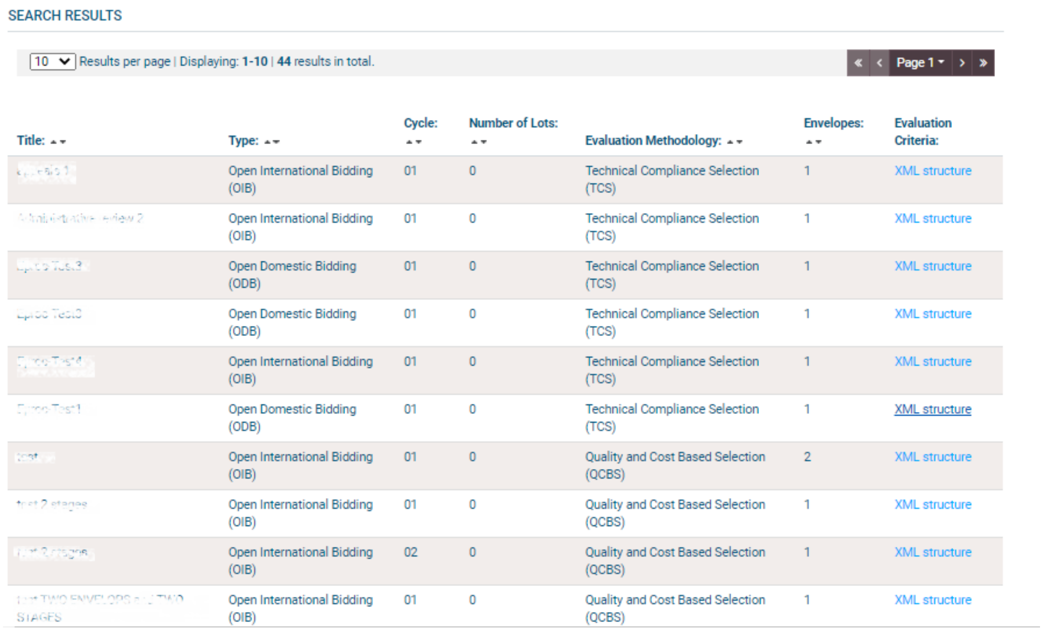


Figure 86: Search for previous processes

The required XML file can be saved to the user's local computer by clicking on the "XML Structure" link next to each process. This file can then be uploaded in the screen to import the evaluation criteria (Figure 84).


SEARCH RESULTS

10 Results per page | Displaying: 1-10 | 44 results in total. Page 1

Title:	Type:	Cycle:	Number of Lots:	Evaluation Methodology:	Envelopes:	Evaluation Criteria:
[illegible]	Open International Bidding (OIB)	01	0	Technical Compliance Selection (TCS)	1	XML structure
[illegible]	Open International Bidding (OIB)	01	0	Technical Compliance Selection (TCS)	1	XML structure
[illegible]	Open Domestic Bidding (ODB)	01	0	Technical Compliance Selection (TCS)	1	XML structure
[illegible]	Open Domestic Bidding (ODB)	01	0	Technical Compliance Selection (TCS)	1	XML structure
[illegible]	Open International Bidding (OIB)	01	0	Technical Compliance Selection (TCS)	1	XML structure
[illegible]	Open Domestic Bidding (ODB)	01	0	Technical Compliance Selection (TCS)	1	XML structure
[illegible]	Open International Bidding (OIB)	01	0	Quality and Cost Based Selection (QCBS)	2	XML structure
[illegible]	Open International Bidding (OIB)	01	0	Quality and Cost Based Selection (QCBS)	1	XML structure
[illegible]	Open International Bidding (OIB)	02	0	Quality and Cost Based Selection (QCBS)	1	XML structure
[illegible]	Open International Bidding (OIB)	01	0	Quality and Cost Based Selection (QCBS)	1	XML structure

Figure 87: Template structures search results

3.5.2 Define Process Criteria

Prior to the publication of the process, the PC users are required to create the Process Structure that includes the questions that bidders need to answer, to participate in the process. Some of these questions may constitute evaluation criteria for the process. For simplicity, throughout this section, all questions or requirements created within the Process Structure are referred to as "Criteria." The criteria are defined in a structured way, separating them into three categories, which can be grouped into 1 or 2 envelopes.

Preliminary criteria
Detailed criteria
Financial criteria

The Preliminary and Detailed parts of a Process Structure are organised in sections and nested subsections which may contain numerous criteria (Figure 88).

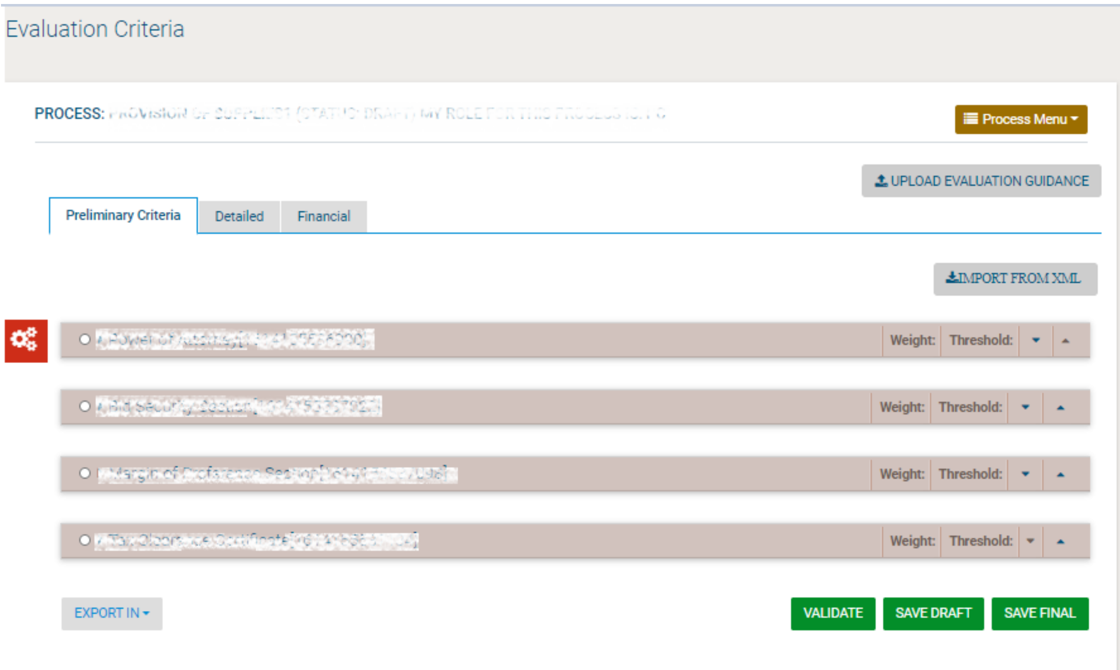


Figure 88: Definition and Management Menus

For each section or nested subsection the following information is required:
The label of the section;
If the evaluation mechanism is a combination of Quality and Price, the weight of the section (the sum of all section weights should be equal to 100; sections in the Preliminary Criteria have associated weights only in case of procedures that include short-listing);
The scoring threshold required for succeeding in the section (the provider who scores less points than the threshold, is automatically disqualified).

To define a section, click on the "Definition"  menu button and then click on the "Add Section" option.

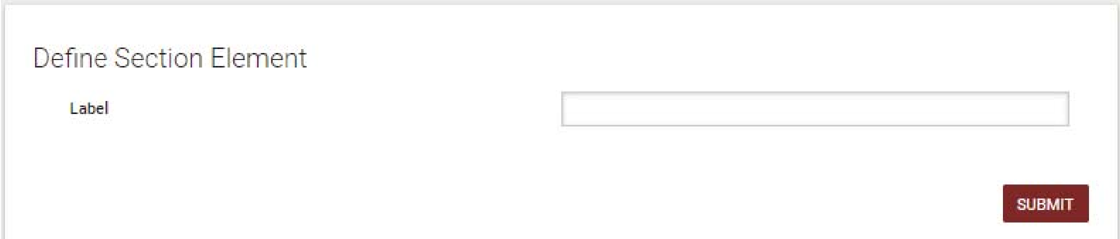


Figure 89**: Define Section**

Within each section or subsection, particular evaluation criteria types are available. The following types of criteria are supported:

Text field
Text area
Number
Date
File
List

The following properties are common between all types of criteria:

The **label** of the criterion.

If the criterion is **mandatory** or not (i.e. a response by the bidder is required for mandatory criteria in order for the bid to be considered by the System as complete and the submission as valid).

Provider Read Only. A response is not provided by the provider in the bid and a score is provided during the evaluation (see section 3.5.2.8).

Textual Evaluation. This choice is enabled if textual evaluation will be used for the specific criterion.

If the criterion is included in the evaluation. If yes,

Criterion weight. The sum of all criteria weights within a specific section must be equal to 100, so as to define their relative weights. This weighting mechanism is used in the case of Quality-Price, or when the procedure foresees the short-listing of Providers.

Criterion threshold. The required scoring threshold for a provider to pass the criterion.

The following sections describe all the supported criterion types.

3.5.2.1 Preliminary Criteria

When PC user defines the Preliminary structure of a process, the PC user will be able to decide if a criterion requires Pass/Fail or a score as a result.

3.5.2.2 Criterion Type: Text Field

This criterion is used when the provider is expected to provide short text response.

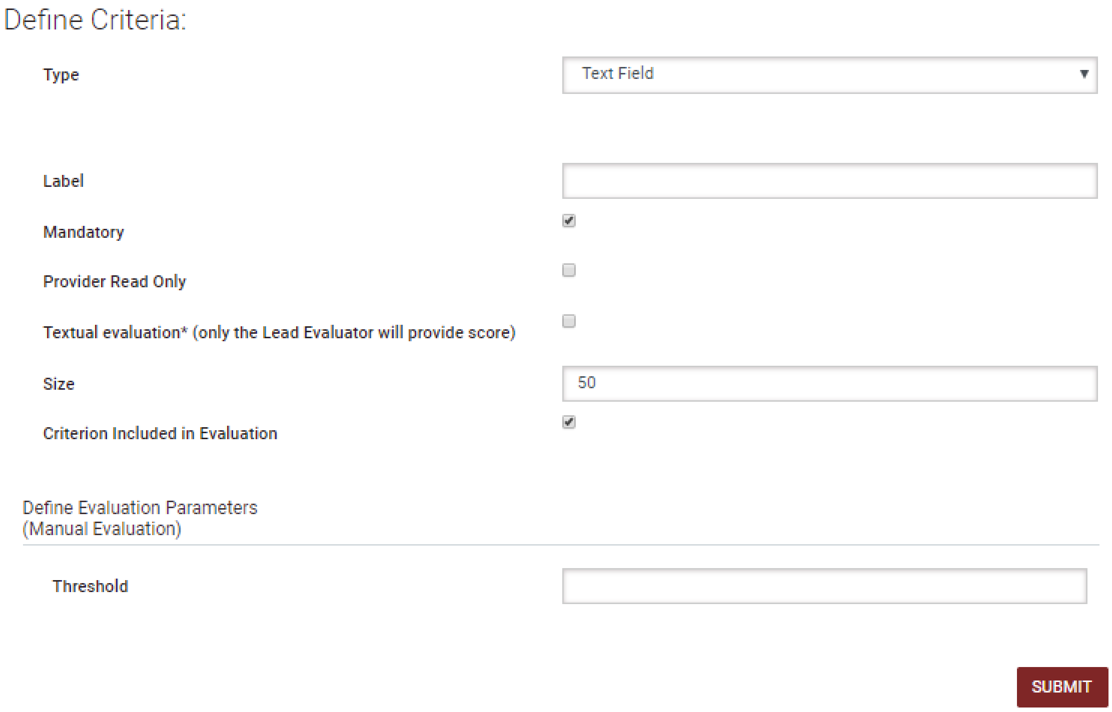


Figure 90: Criterion type: text field

3.5.2.3 Criterion Type: Text area

This criterion is used when the provider needs to provide a longer text response which spans multiple lines and paragraphs.

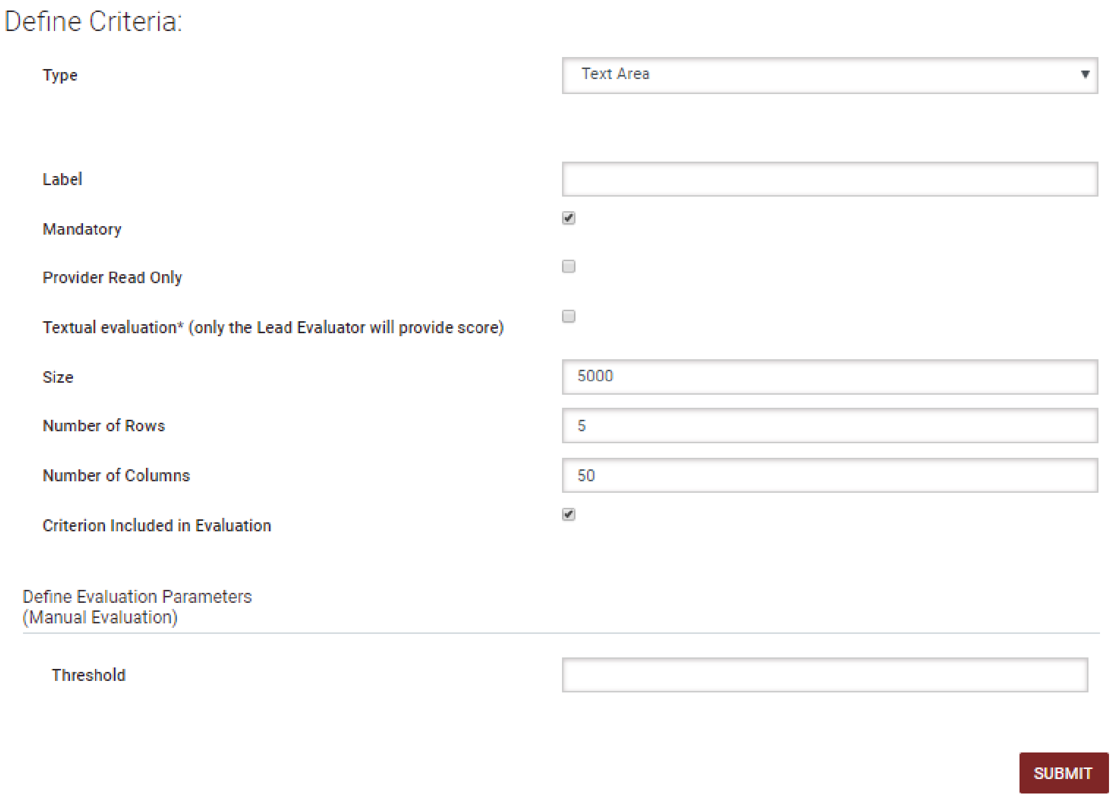


Figure 91: Criterion type: text area

3.5.2.4 Criterion Type: Number

The following parameters must be defined:
Minimum and maximum range;
Measurement units;
Step.

As the System can support the automated scoring of any quantifiable criteria, the user may select the type of the evaluation formula to be used:

Linear Formula: The user defines Lower and Upper Limits with their associated scores.
Step Formula: The user defines value ranges and their associated scores. Selecting the buttons "Add" and "Delete" inserts and deletes scoring ranges.

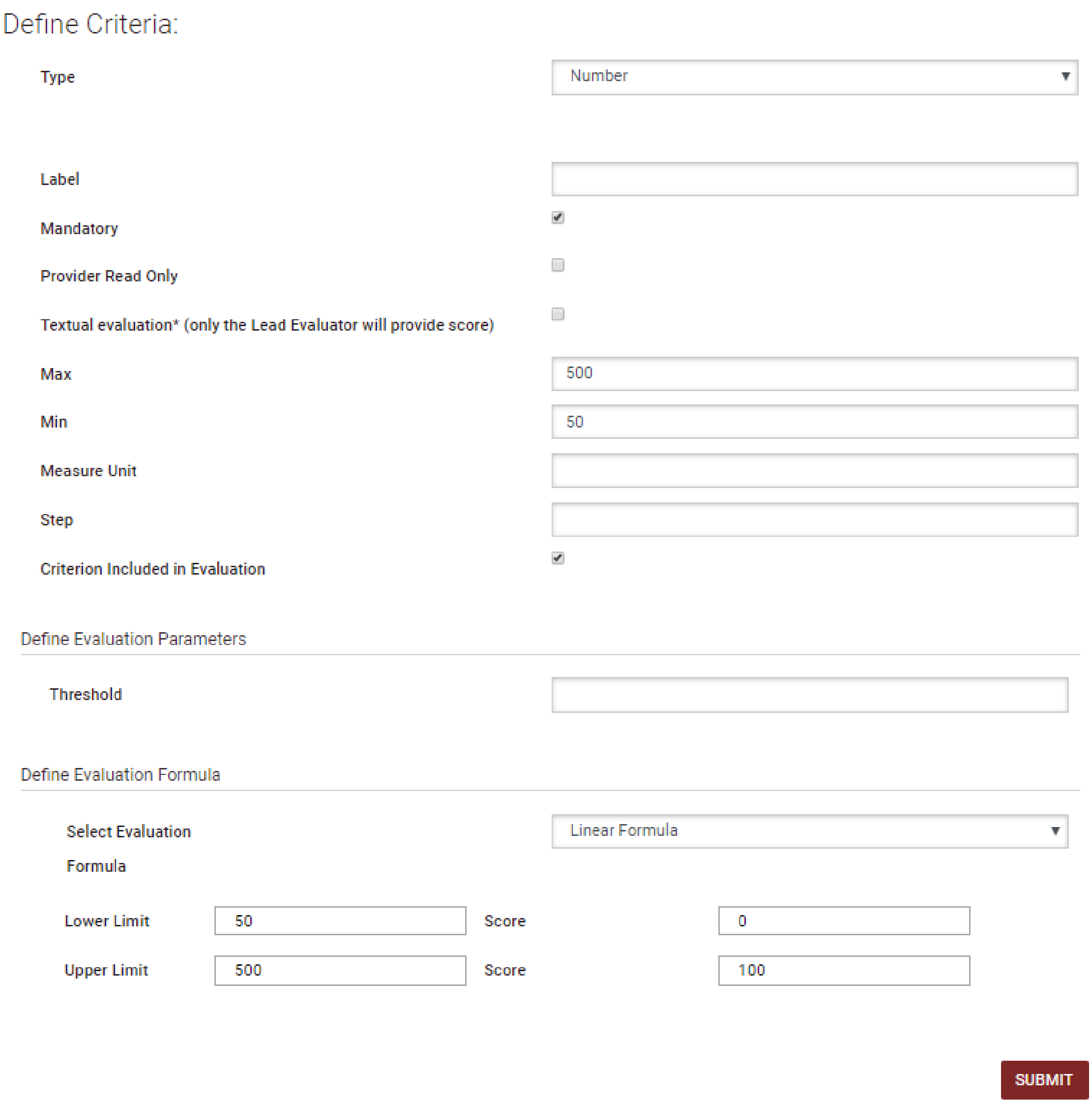


Figure 92: Criterion type: Number with linear evaluation formula

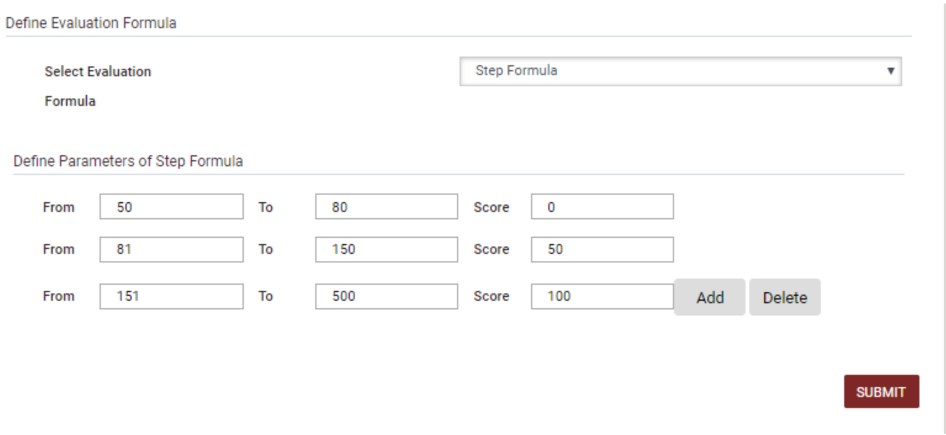


Figure 93: Criterion type: Number with step evaluation formula

3.5.2.5 Criterion Type: File

For this criterion type the user should define the maximum allowed size of the file to be attached.

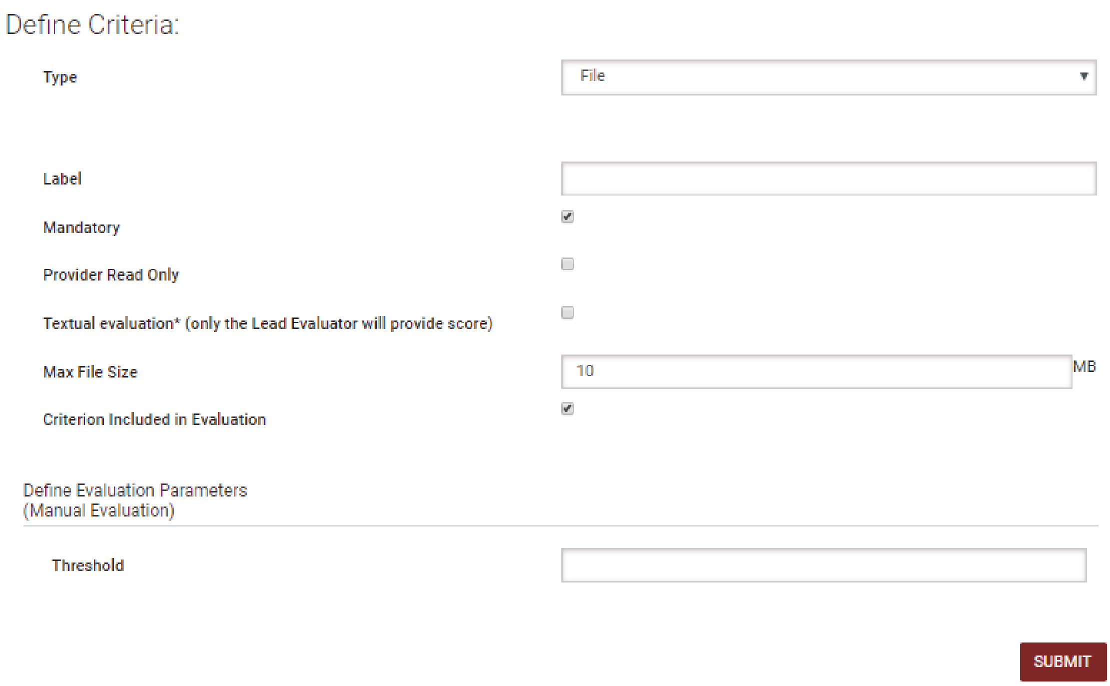


Figure 94: Criterion type: file

3.5.2.6 Criterion Type: List

In order to create a list, the following options should be defined:
Type of list: A choice between radio buttons, check box and combination box;
Number of options: The user provides the number of options that should be created ;
Label: The label for each option created;
Score: The automated evaluation score for each option.

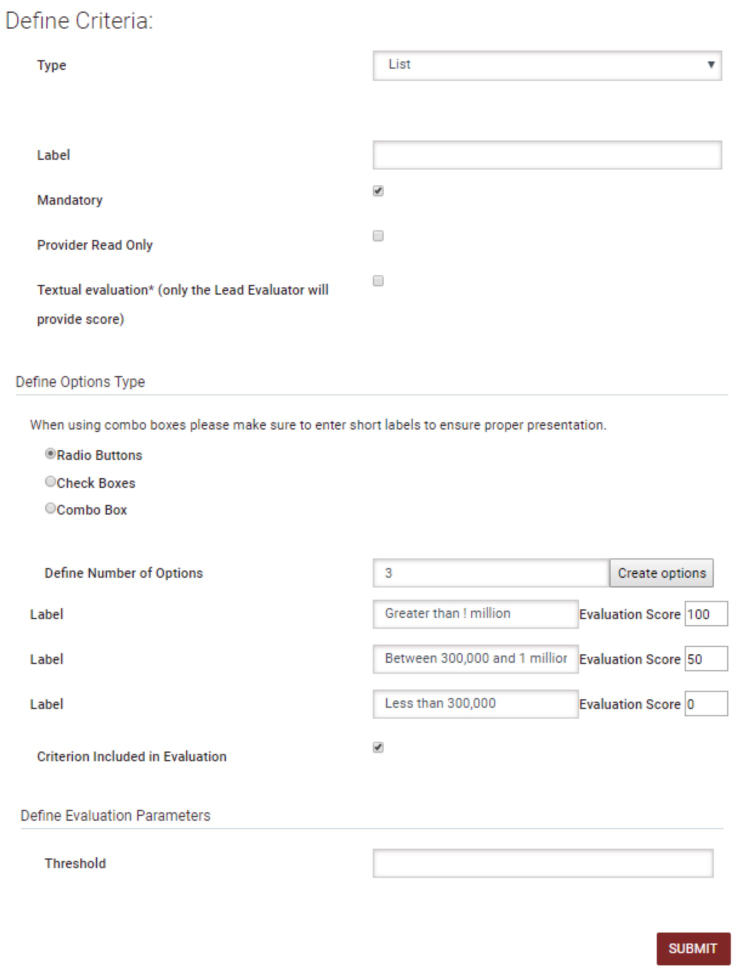


Figure 95**: Criterion type: List**

3.5.2.7 Criterion Type: Date

In order to create this criterion type, the user provides the following information:
The minimum and maximum allowed values for the date criterion.
The evaluation formula (linear formula and step formula), similar to Number criteria.

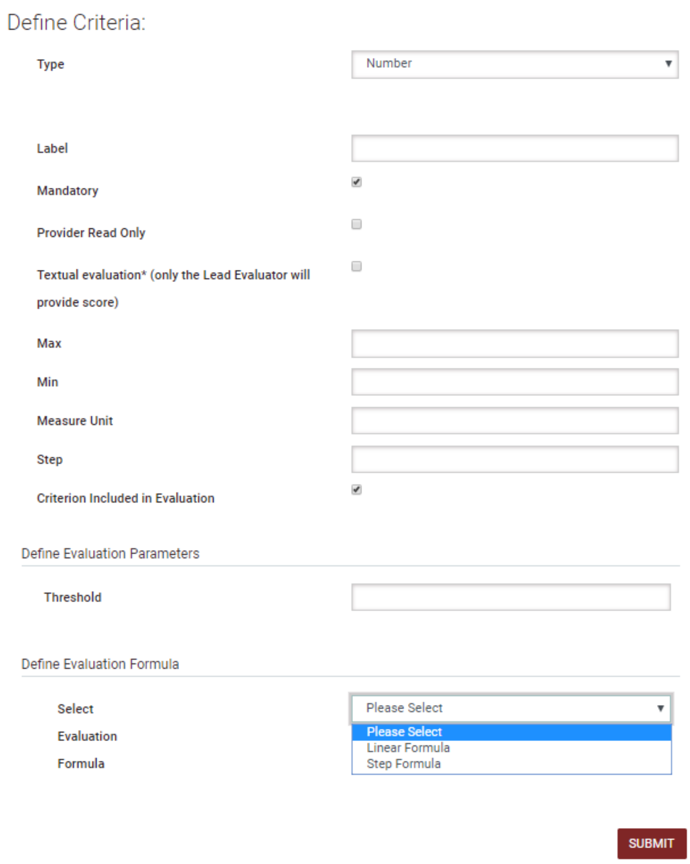


Figure 96: **Criterion Type: Date**

3.5.2.8 Provider read only criteria

This choice is enabled for the criteria where the providers should not provide any answer (e.g. scoring of meetings, presentations, site visits, etc.). The provider will view the existence of the criterion but the scoring will be provided directly by the evaluators. The automated evaluation mechanism will be disabled for all the provider read only criteria.

In this respect, such criteria are “read only” for providers (they can see them but cannot provide answers to them) and “read/write” access is provided only to evaluators.

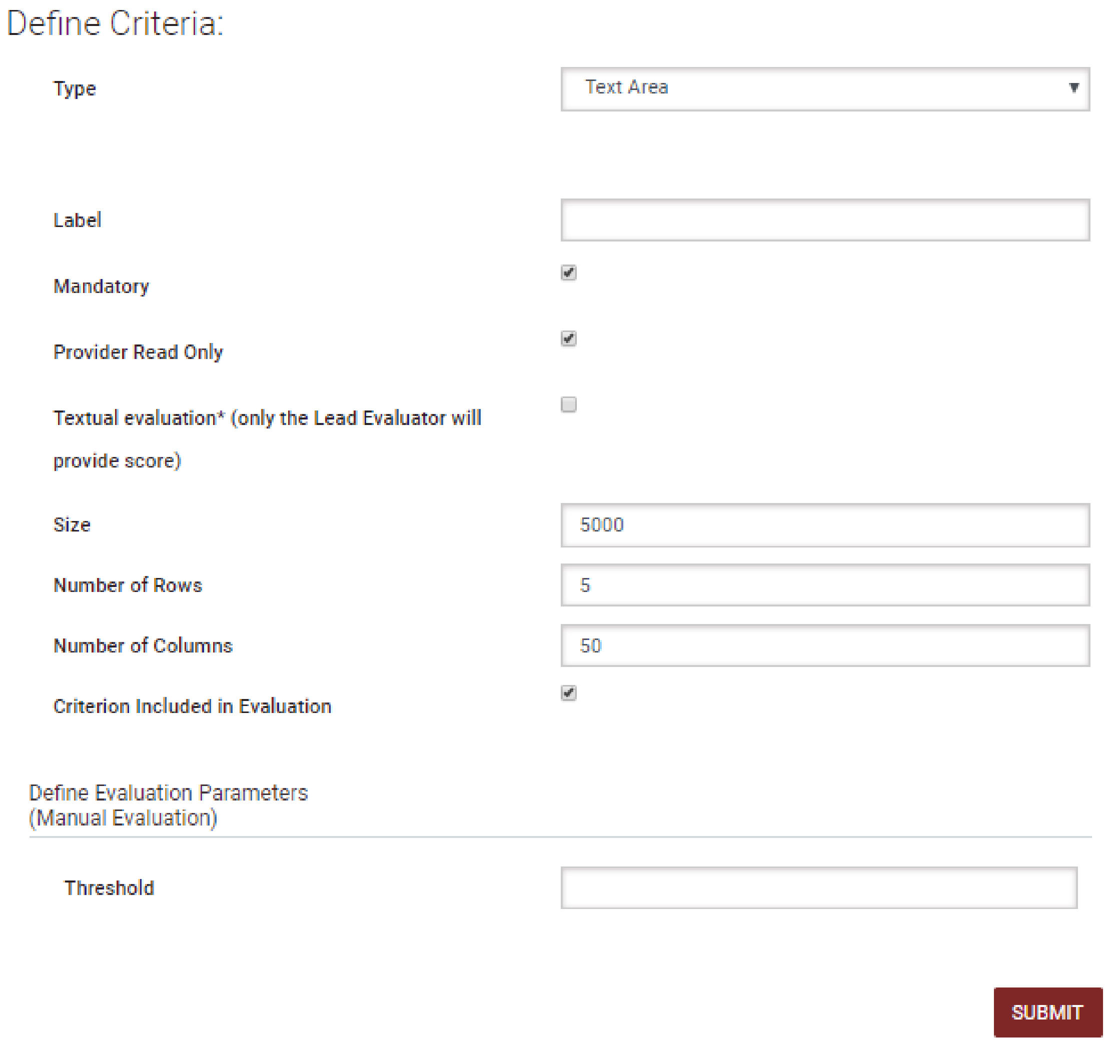


Figure 97: Provider read only criterion

3.5.2.9 Definition of envelope weight

In order to define the weight of the envelopes (Detailed and Financial) the user needs to select one of the envelopes and provide the relevant envelope weight (Figure 98). The following rules must be followed:

The sum of the weights of the Detailed and Financial envelopes must be equal to 100.

The user needs to define the weight in only one envelope. The other envelope will be assigned the remaining weight (Figure 99).

An information icon "🛈"will appear next to each field that a user may need guidance.

The icon will appear next to the "Envelope Weight" fields of the Detailed and Financial Envelopes.

Once the user passes over the Information icon with the mouse, a message will appear "Please refer to the User Manual for further assistance", where the text will be a link and once selected the user will be redirected to the "User Manual" document.

Figure 98: Detailed Envelope's weight

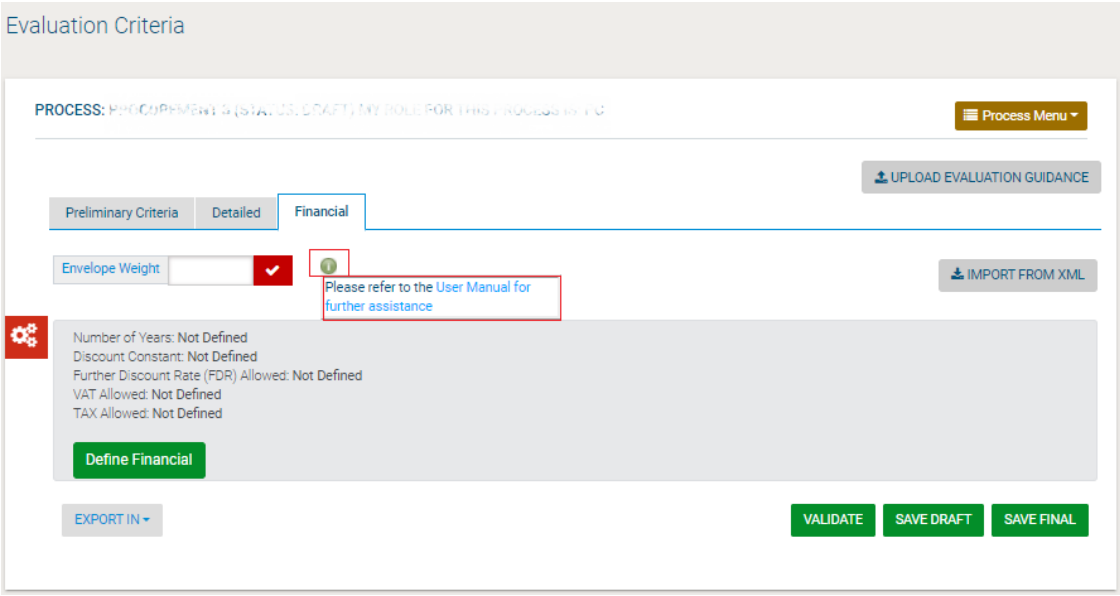


Figure 99: **Financial Envelope's weight**

3.5.2.10 Financial Envelope

The definition of the financial envelope includes the definition of the **Financial Element** and the introduction of the financial criteria. After the successful completion of these, the financial envelope is considered as complete (Figure 100).

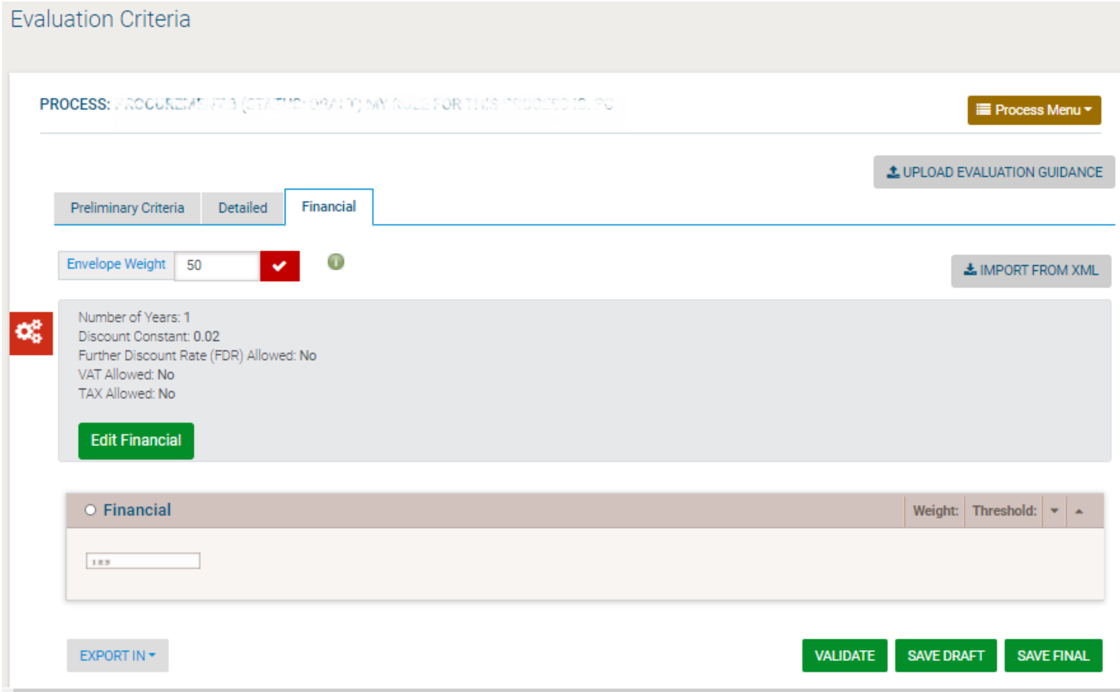


Figure 100**: Example of the financial envelope**

3.5.2.11 Definition of the financial element

In order to define the financial element, the user must provide the following information:

Choice if calculation will be performed at present value.

Number of years of the financial element (if more than one year, the present value calculation is automatically enabled);

Discount constant: the constant (e.g. inflation rate) that will be used in order to discount the future prices into their current values;

Further discount rate;

Whether VAT should be provided separately;

Whether other Taxes should be provided separately.

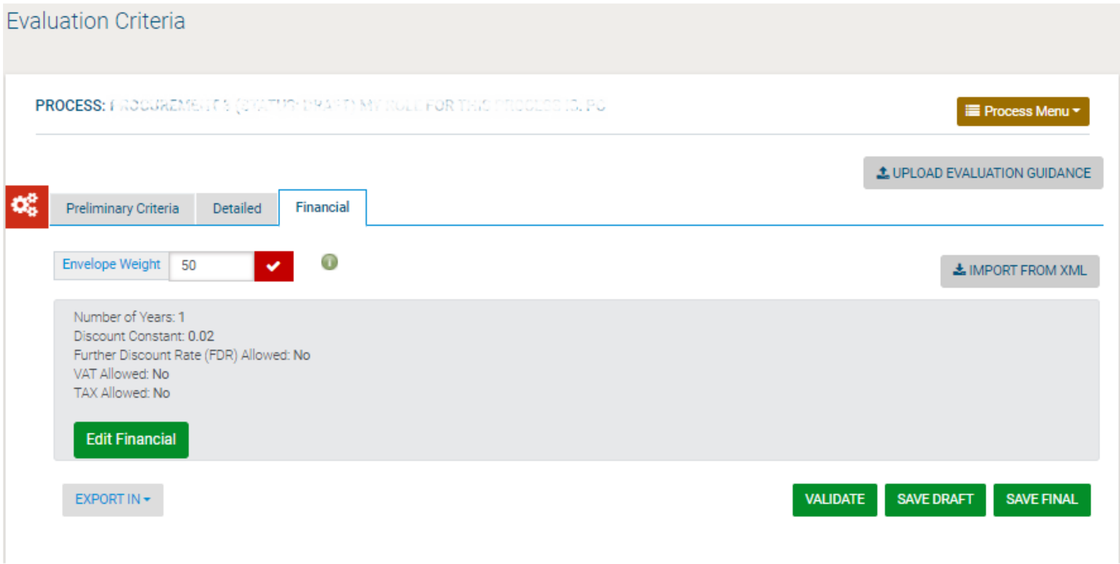


Figure 101**: Definition of the financial element**

The aforementioned advanced functionality of "present value calculation" permits evaluators to evaluate financial offers considering future payments through the contract years, also taking into account inflation and currency depreciation.

3.5.2.12 Setting financial criteria

In order to create financial criteria, the user inserts the following information:
The name of the criterion (Figure **102**);
Whether the criterion is mandatory or not (at least one financial criterion should be mandatory);
Whether an attachment (containing a detailed price schedule) is mandatory or not;

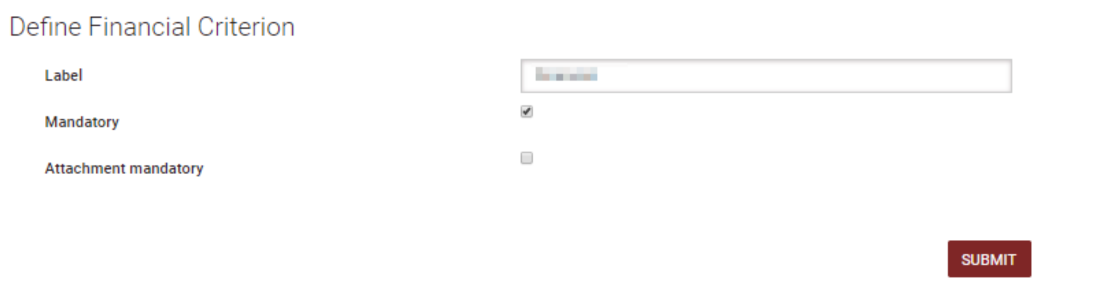


Figure 102**: Define Financial Criterion**

3.5.2.13 Validating and saving the Process Structure

To validate whether the Process Structure conforms to all the System evaluation rules, select the "Validate" option after clicking on the "Management" button. In case the Process Structure is successfully validated, a relevant message is displayed (Figure 103). A different message is displayed if a validation rule is violated. In this case, the message also provides a description of the violation (Figure 104).

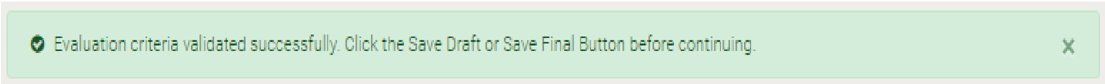


Figure 103**: Successful process structure validation**

Figure 104**: Violation of a validation rule in a process structure**

Of course, the validation rules relate only to the soundness and completeness of the Process Structure and not its "business" content. The validation rules will, for instance, check whether the weights of criteria in a section sum to 100 and will check whether there is a list criterion for which the possible answers are not defined. But it cannot validate whether all business questions/requirements for a process are included by the user or whether there is a missing financial criterion.

3.5.3 Create Process Structure with Lots

In the event of a process with Lots, the PC user needs to specify the relevant process parameters during the Process Structure creation phase, in order to create a process which can be awarded in Lots. Creating the Process Structure for each separate Lot does not differ from creating a Process Structure for a process without Lots. As shown in Figure **105** below, the user will be able to select the Lot to create and modify its structure.

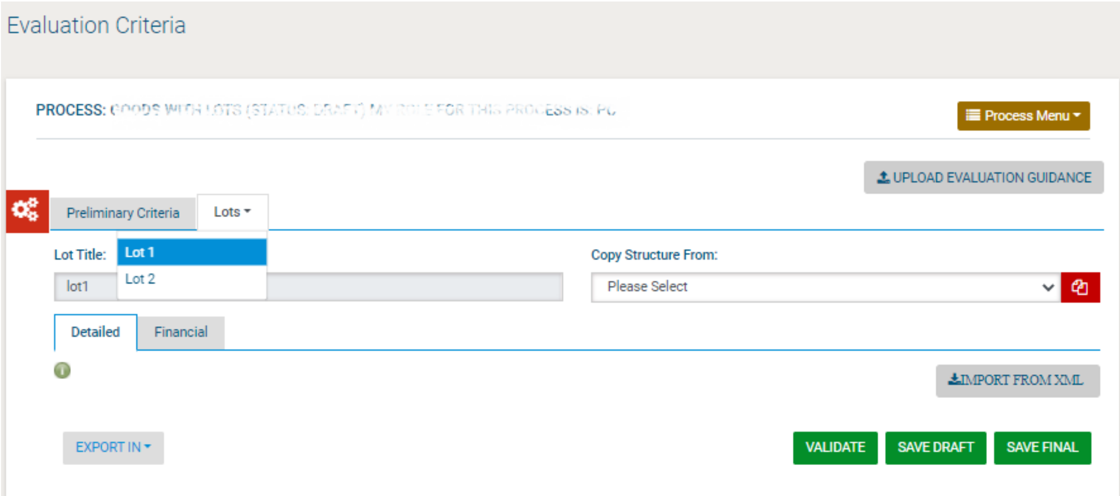


Figure 105: Selection of Lot

The only difference is that the Preliminary criteria are defined only once for all Lots, while the Detailed and Financial criteria are specific to each Lot. After the selection of the appropriate Lot (already pre-defined during the process workspace creation), the PC user is able to add sections, subsections and criteria as for a process that does not contain lots (section 3.5.2).

3.5.3.1 Copy Lot Structure between Lots

The System allows PC users to copy the Process Structure of one Lot to another Lot. This can be used when the evaluation criteria of one Lot are similar to one or more other Lots. The System allows the user, after copying criteria from one Lot to another, to then edit them, so that they are adjusted to the exact needs of each Lot.

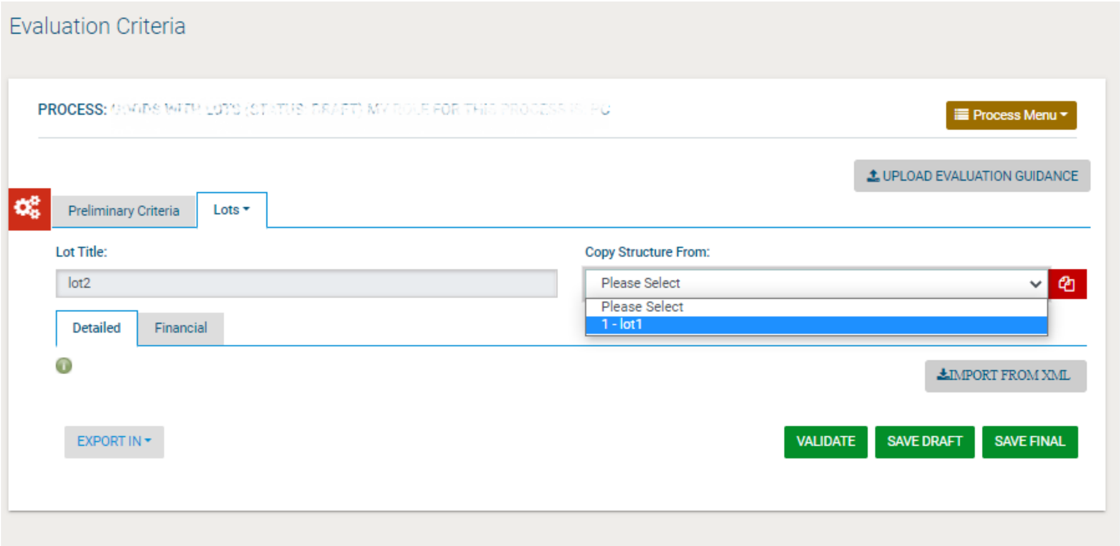


Figure 106: **Copy Lot Structure**

3.6 Create / Publish Process Notice

Once all documentation is finalised the user may proceed to the creation and publication of the Process Notice (for Open/Limited National/International Bidding/Selection procedures). A respective task will be available in the user's task list. The user will navigate to the "Notices" tab in the Notice and Process documents screen.

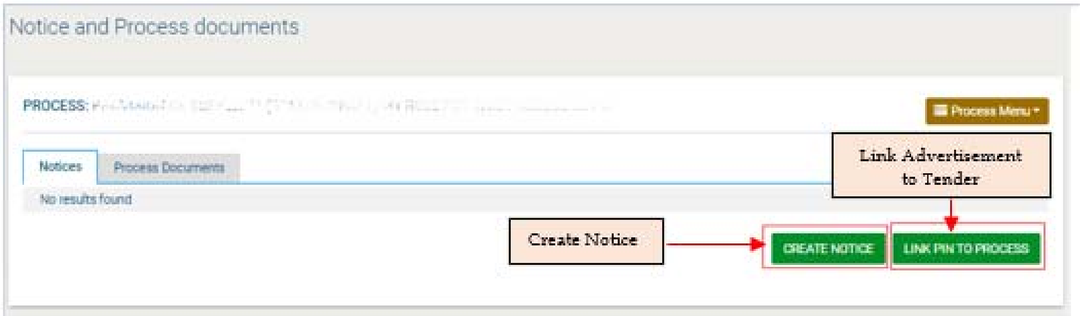


Figure 107: Create Process Notice

In the pop-up window that opens when the user clicks on "Create Notice", there is only a single option available for the user to select to create the Process Notice. The form is loaded after the user clicks on the "Forms Module" button.

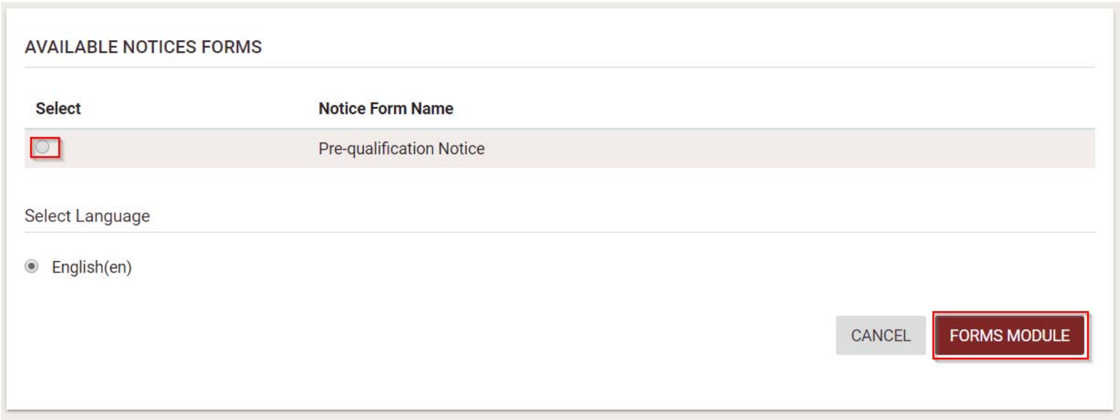


Figure 108: Available Notice Forms page

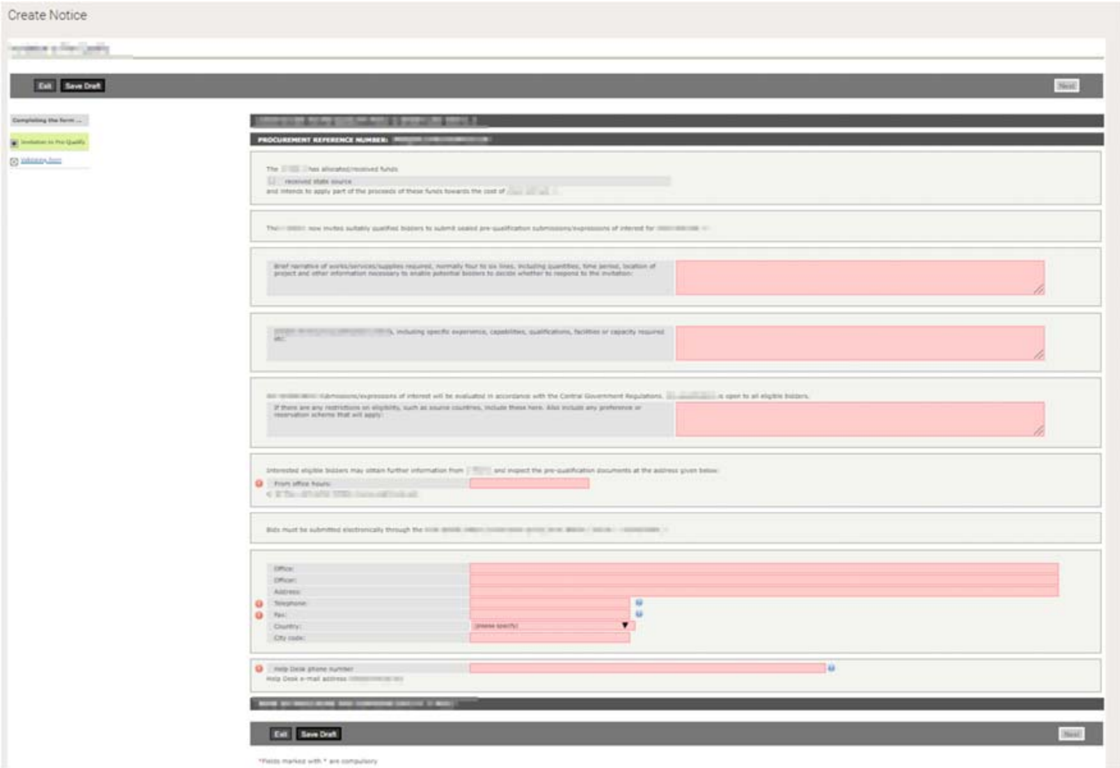


Figure 109: Form filling tool / notice details

Some of the fields in the notice are drawn from the process structure and cannot be edited by the user in the notice. After all the remaining details are populated, the user may save the notice as "Draft" or "Final". Any notice saved in "Final" status is available for publication.

Figure 110: Contract notice publication

3.7 Invitations

Once all documentation is finalised the user may proceed to the creation and dispatch of invitations. A respective task will be available in the user's task list. The user will navigate to the Invitations tab in the Notice and Process Documents screen.

Figure 111: Invitations tab / Create new invitation

The user will need to click on "Create New Invitation" for the system to auto-generate the respective information

The system populates all fields with any core information. The list of Providers is populated by the user along with a description and any additional attachments.

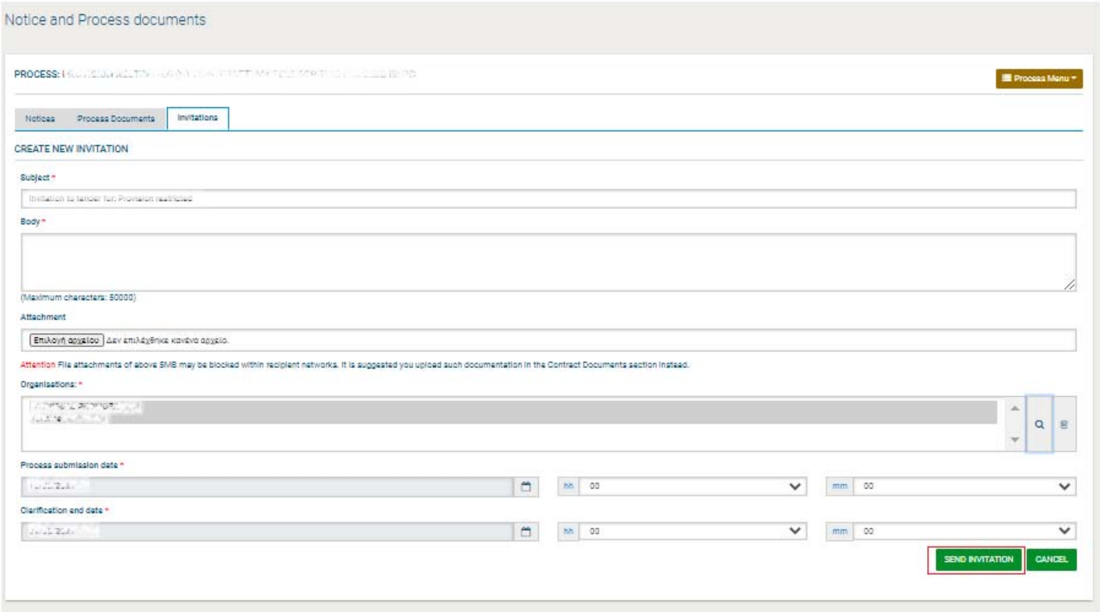


Figure 112: Invitation page

Upon clicking of the "Send Invitation" button the system will dispatch the invitation to all invited providers, after the Resident Due Process Committee approval, and will trigger the bidding process.

RDPCM/RDPCS users have to approve the Bid Notice or the Invitations.
Three RDPCM/RDPCS users in case the Resident Due Process Committee Approval is set to online, one RDPCS user in case it has been set to offline, during the definition of the workflow (3.4).

In case the PDE Entity is a child PDE and it does not contain Resident Due Process Committee users, the process will be handled by the parent PDE Resident Due Process Committee users.

In case the PC user edits the process details after the process publication, the RDPCM or RDPCS users will be tasked to approve the aforementioned modifications.
The modifications will be displayed to the RDPCM or RDPCS users.

Figure 113: Review Process Modification task

Figure 114: View Modifications button

Field Name	Source Value	Target Value
Title	[illegible]	[illegible]
Description	[illegible]	[illegible]
Project Name		
Grant or Loan Number		
Development Partner Funding	[illegible]	[illegible]
Multiple bids	[illegible]	[illegible]
Postqualification	[illegible]	[illegible]
Tax Clearance Certificate required	[illegible]	[illegible]
UNSPSC Codes	[illegible]	[illegible]
Pre-bid meeting required	[illegible]	[illegible]
Pre-bid meeting minutes		
Pre-bid meeting date		
Bid submission deadline date	[illegible]	[illegible]
End of Clarification Period	[illegible]	[illegible]
Allow providers to upload	[illegible]	[illegible]

Figure 115: View Modifications page

After the RDPCS or RDPCM users reviews the modifications and provide a comment, if deemed necessary, the RDPCS or RDPCM users will have to Accept or Reject the Modifications.

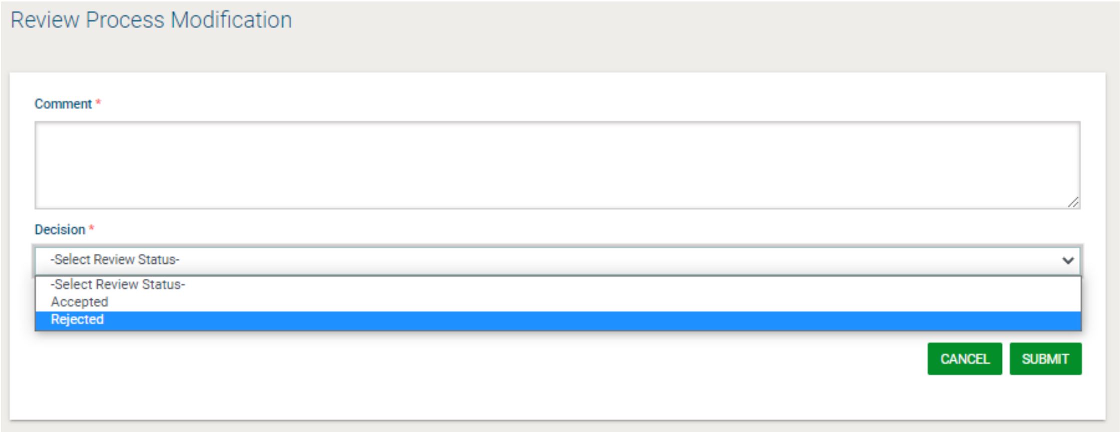


Figure 116: Accept/Reject Modifications

The process details will only be updated after the approval of the Contracts Committee.

3.8 Clarifications

In the section of clarifications the system provides the following functionality to the user:
To manage all clarifications which have been requested by Providers.
To insert clarification requests which have been introduced by Providers offline.
To provide information not associated with any particular requests.

Each clarification request has one of the following statuses:

 The clarification request has not been answered
 The clarification request has been answered
 The clarification request has been published

Once the PC of the process receives a request for clarification a respective task will be created. The user may access the request and create an answer for it.

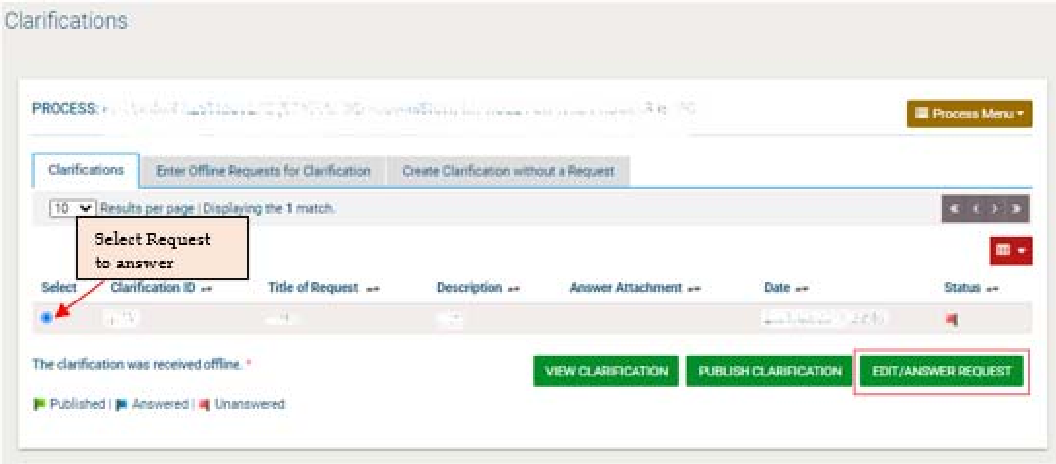


Figure 117: View clarification request

In responding to the request, the PC user is able to edit the initial request as well as provide a response. The request may need to be edited in circumstances where it contains details that could identify the source of the request, as all clarifications should remain anonymous. In addition to providing a response to the clarification, an attachment may be added for providers to read. If more than one document needs to be sent, these should be combined into a ZIP file and this file should be uploaded with the clarification response.

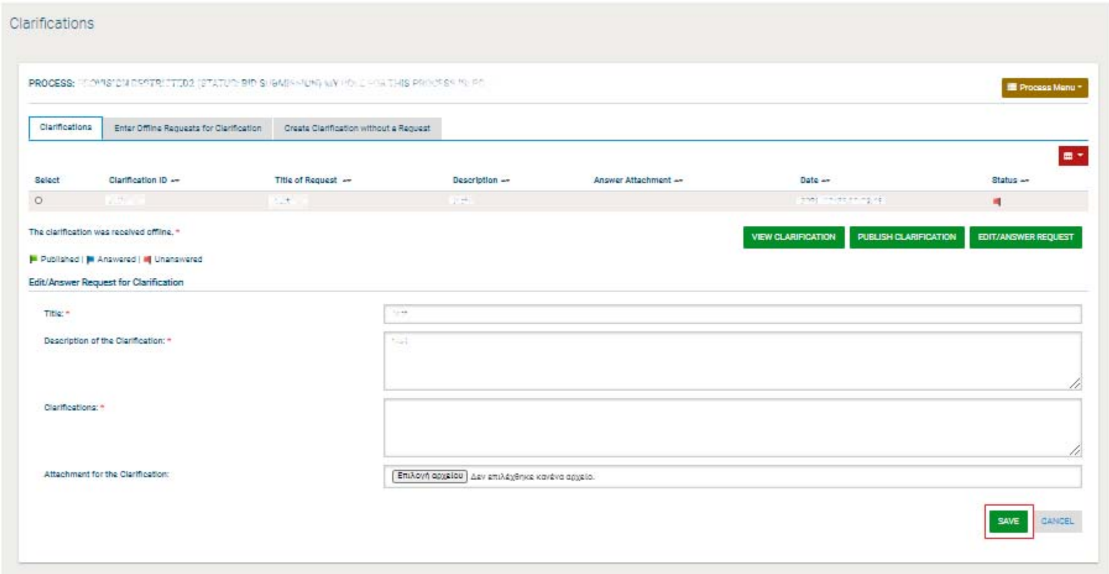


Figure 118: Reply to clarification request

Upon answering the clarification request, the response will still not be available to providers until the publication of the clarification by the PC.

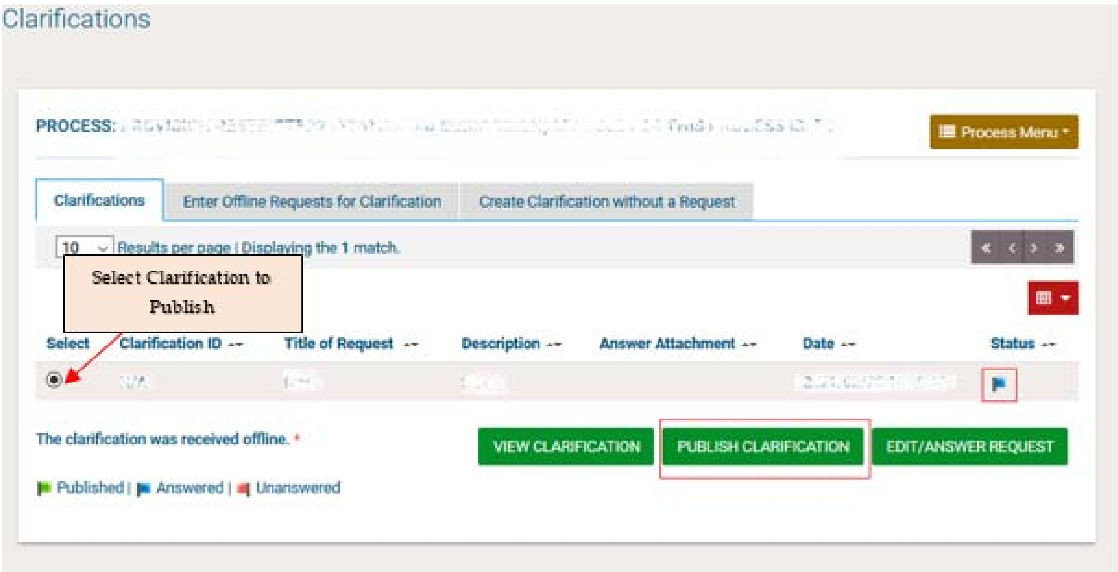


Figure 119: Publish clarification request

Once the clarification is published it will be made available to all providers associated with the process and not only the provider who initiated the request for clarification. The PC user also has the option to download a PDF file with all published clarifications.

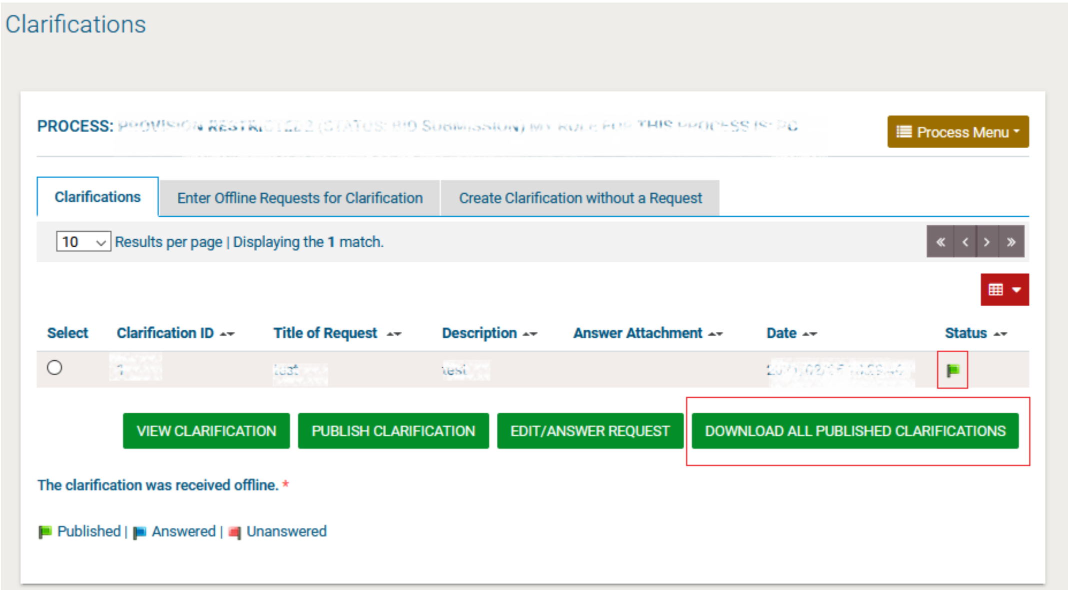


Figure 120: View published clarifications

3.8.1 Create an Offline Request for Clarification

In order to create a clarification request which was received offline, the user selects the "Enter Offline Requests for Clarification" tab (Figure 121). The user can then provide the following information and then press on the "Send Request" button(Figure 121):

Title of the request.
Language of the request.
Description of the clarification request.
Name of the requestor.
City.
Address.

Post Code.
Phone Number.
Fax number

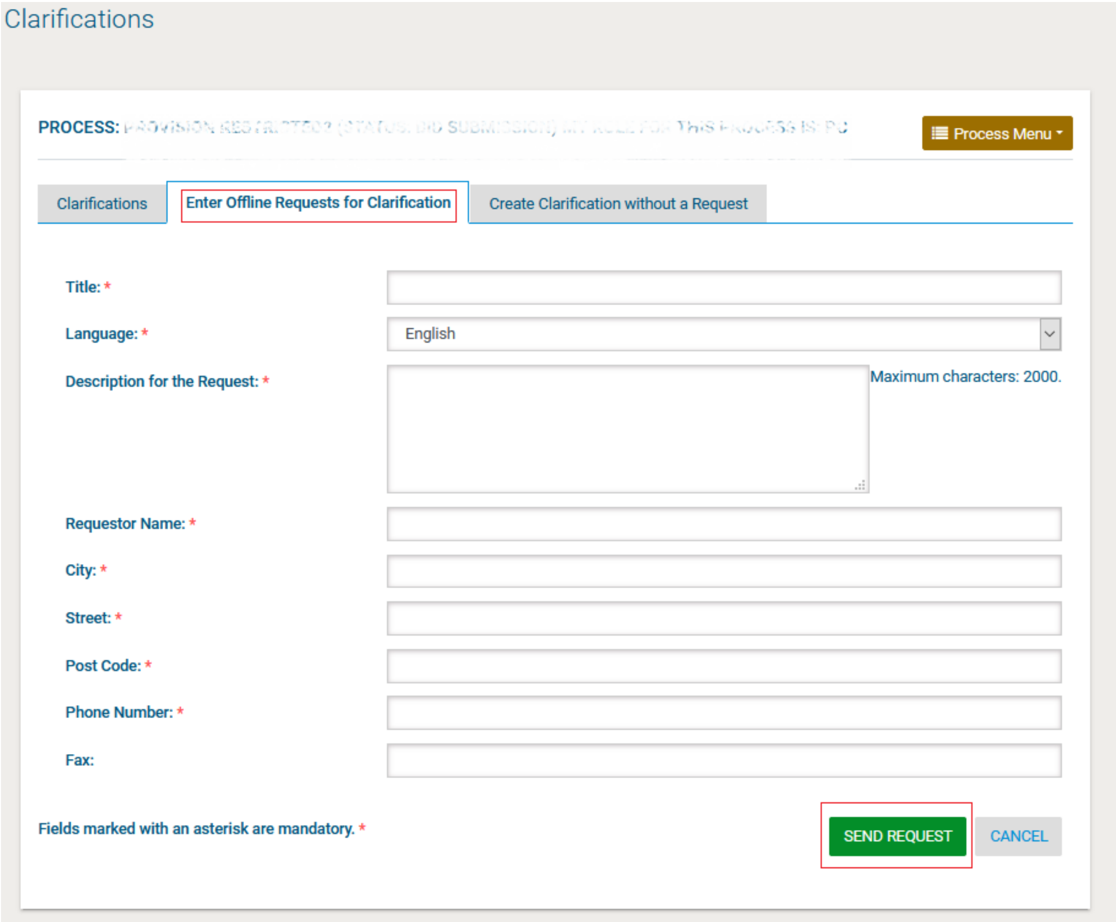


Figure 121: Offline request for clarifications

3.8.2 Creation of a Clarification without Request

In order to create a clarification without a request, the user selects the tab "Create Clarification without a Request" (Figure 122). The user then provides the following information:
Title of the clarification.
Language of the clarification.

Description of the request.
Details (Body) of the clarification.
Attached file for the clarification (optional).

The user selects the "Send Request" button to send the request.

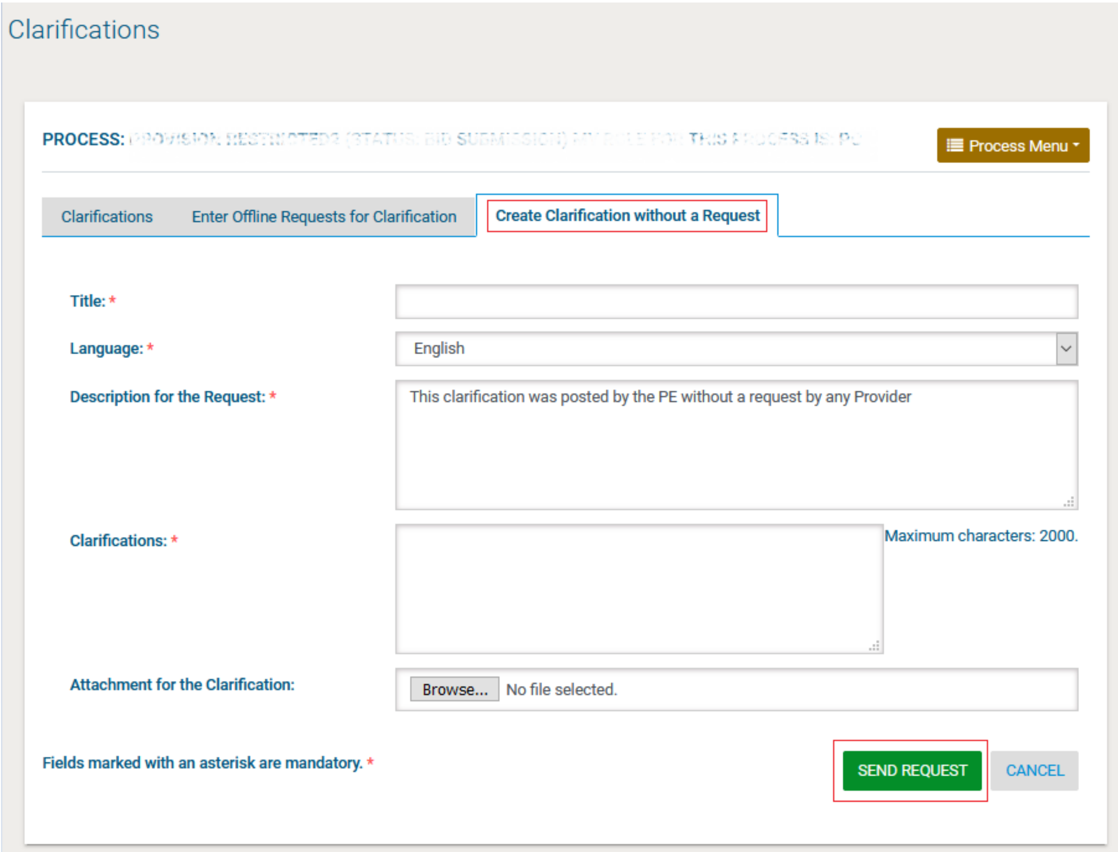


Figure 122: Clarification without a request

3.9 Bid Opening

The opening of the bid documents is performed according to the four-eye principle and requires the involvement of two procurement officers who have been associated as Bid Openers (OP) to the specific process.

The first OP user submits the list of bid documents which he proposes to be opened. The second procurement officer has the choice to either approve or reject the first opener's choice. All these actions are later registered in the automatically generated opening report. Where the bid requires a bid security, the bid security provided by each provider is also recorded in the opening report.

3.9.1 Unlock Bids – 1st OP

Once bid opening date is reached one of the OP users will need to login. The user's task list will be updated as per below.

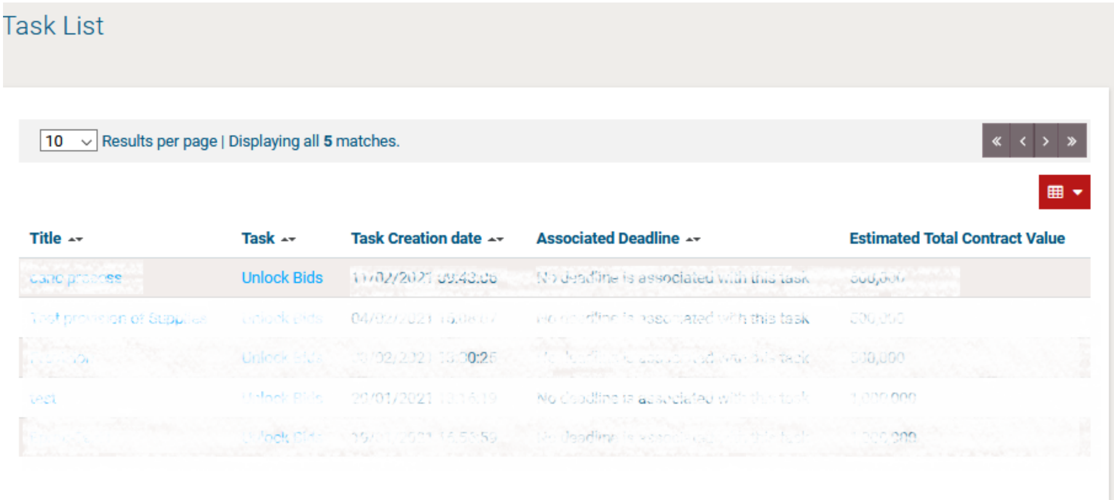


Figure 123: Open bids task

The user will be able to view the Bid Opening Space page either through the task or the respective menu item from the Process Menu. Where the process workflow specified Offline bid submission, the user must add information for bids received offline (section 3.9.2) before proceeding to authorise the opening.

The OP user should then proceed to select confirm the bid opening.

In case the process has multiple currencies, then the first opener defines the exchange rates.

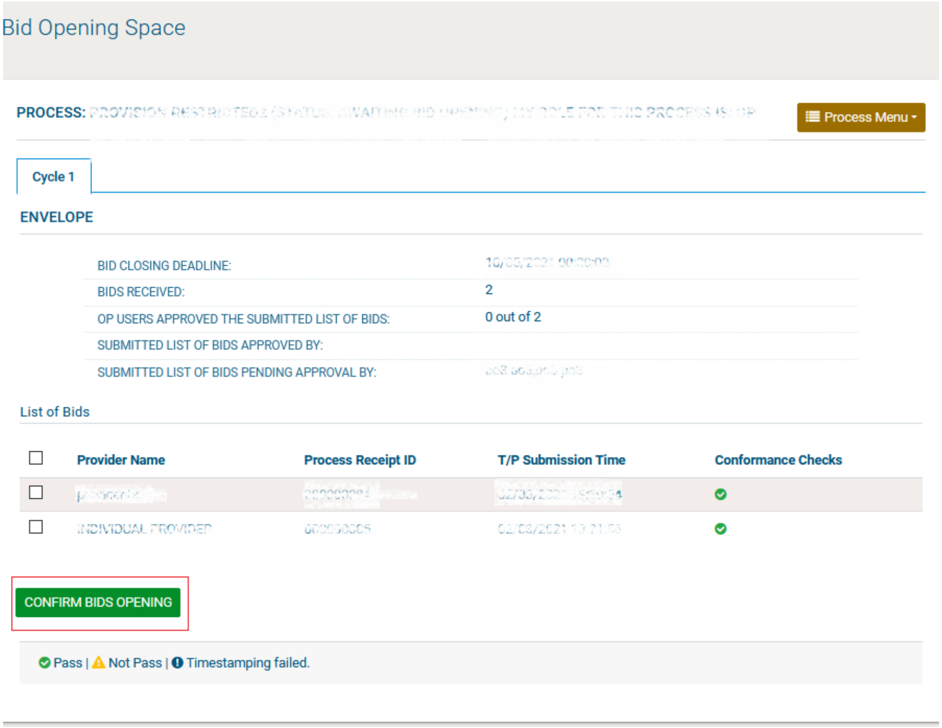


Figure 124: Confirm bids to be opened

3.9.2 Offline Bids

In case offline bids have been specified in the process structure, the OP may update the system with the respective information. The only limitation is that the Provider that performed the offline submission must exist as a registered Provider in the System.

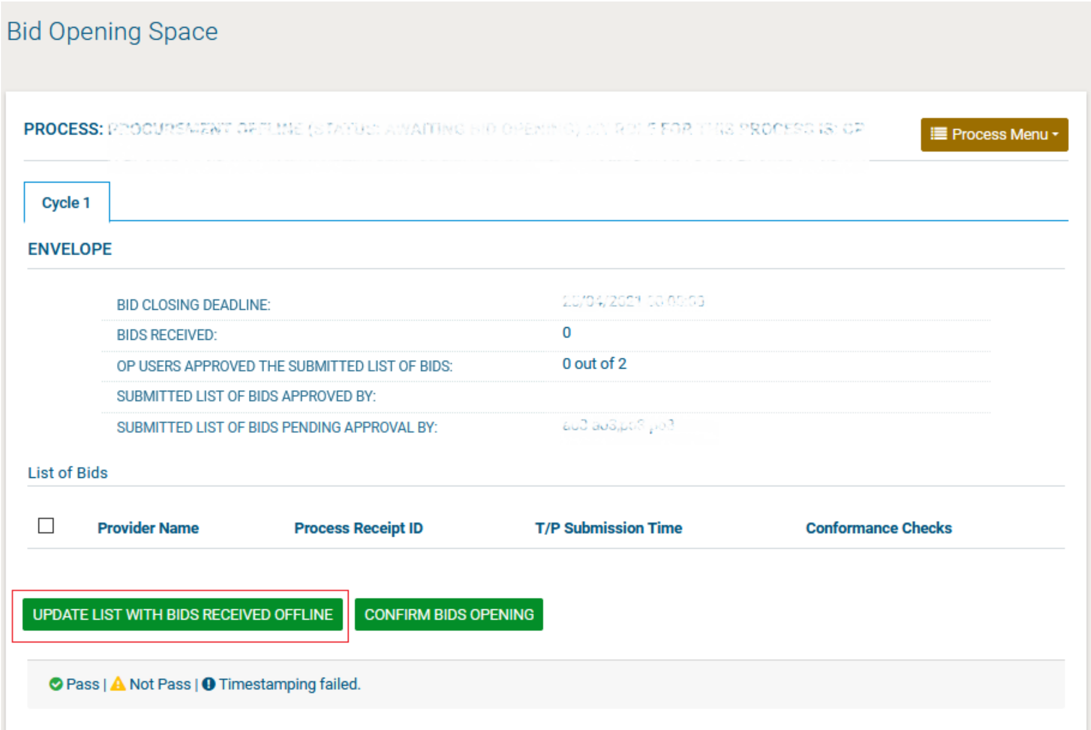


Figure 125: 1st OP view for offline bid submission

The process may be repeated to capture the information for multiple provider submissions.

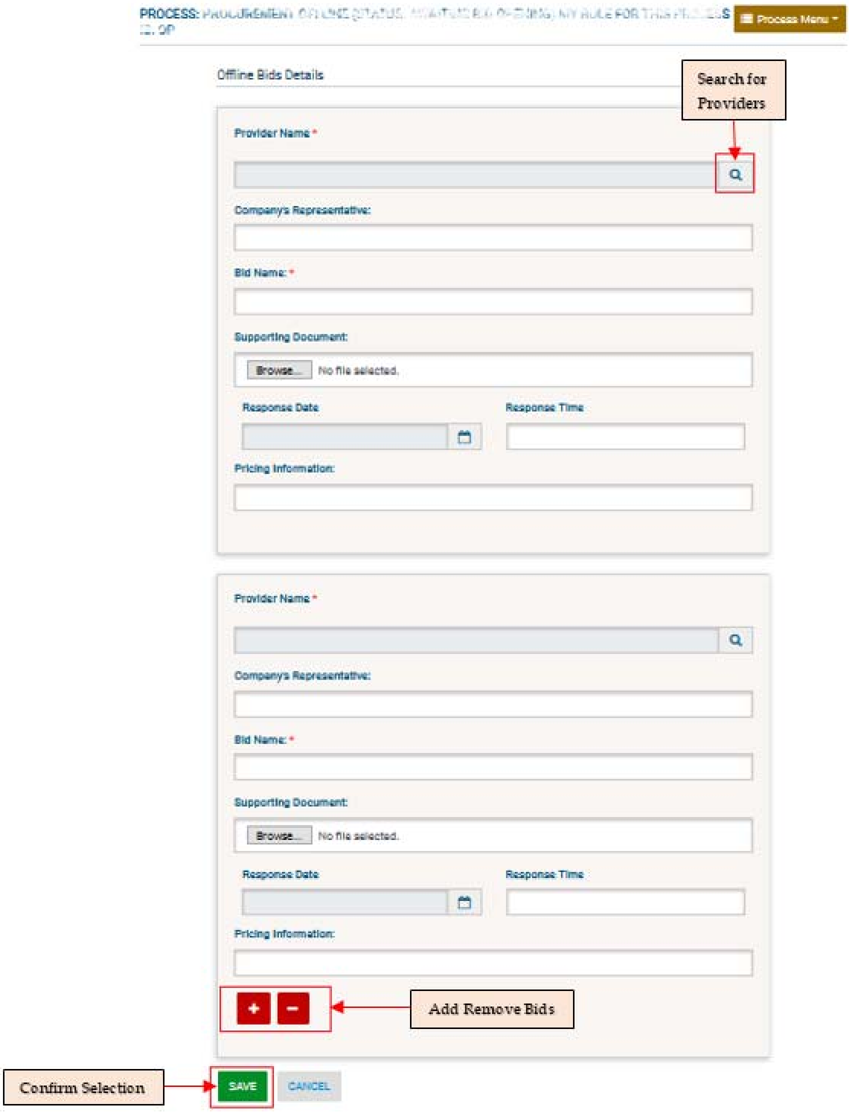


Figure 126: Add bids received offline

The OP searches for the respective Provider through a dedicated search facility. When the process is initiated by invitation rather than by publication, only invited providers are available for selection by the OP user.

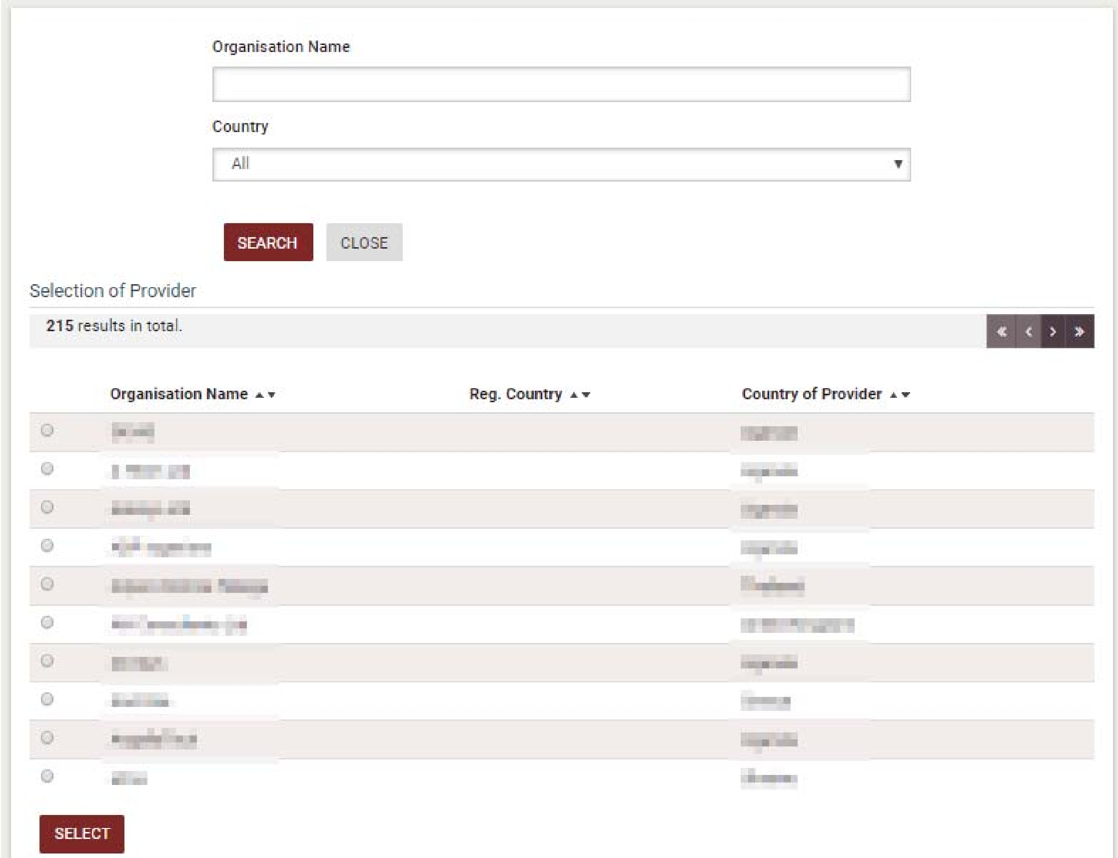


Figure 127: Search for the Provider that submitted offline bid

Once all information is inserted the OP will click the "Confirm Bids Opening" button to authorise the opening of bids.

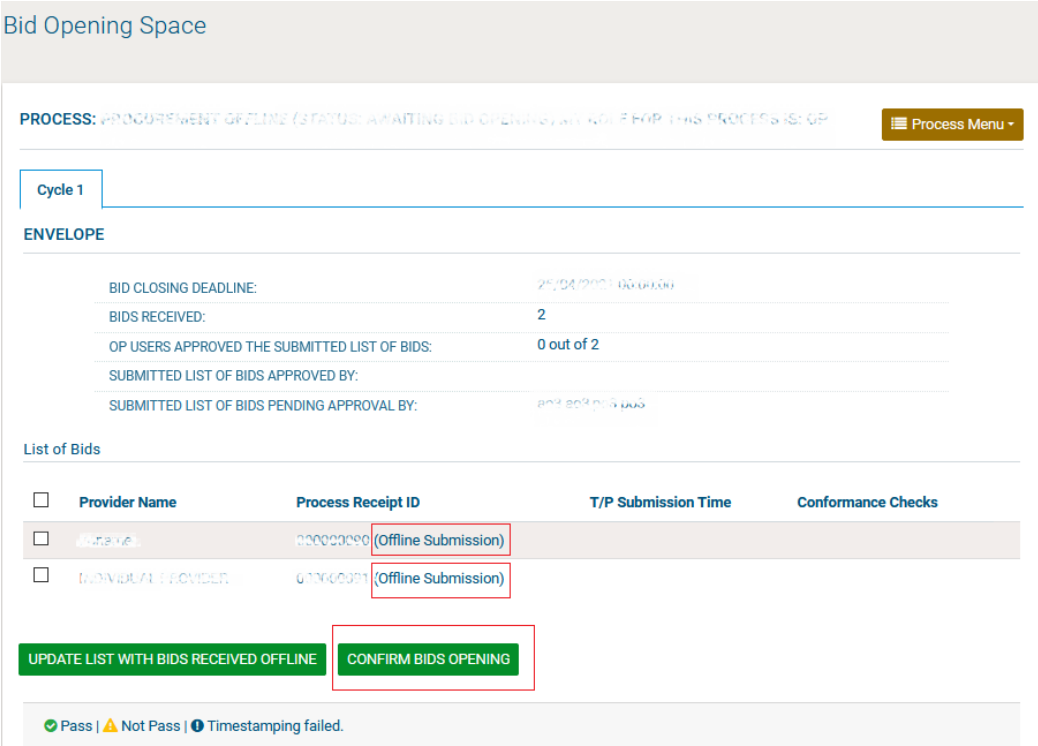


Figure 128: View of bids to be opened for offline submission

In case the user has grounds for not allowing a bid to be opened, then the respective bid should not be included in the list of bids to be opened.

3.9.3 Approve Unlocking – 2nd OP

Once the 1st OP authorizes bid opening, the process reverts to the 2nd member of the opening committee.

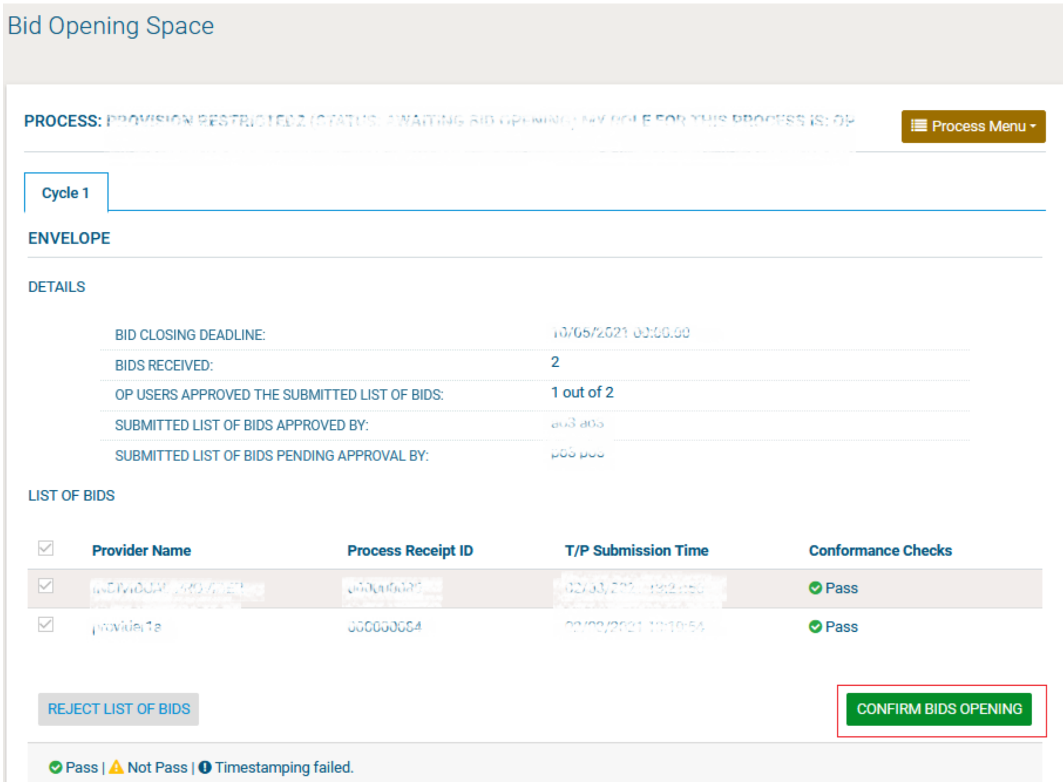


Figure 129: 2nd OP Confirm Bids Opening

The user either accepts the proposed bids opening, or rejects the list of bids that are about to be opened. In the latter case, the flow will revert back to the 1st OP again to confirm the new Bid Opening.

Once the opening is approved the System (after a few seconds pass) will display the list of opened bids along with the report of the opening ceremony.

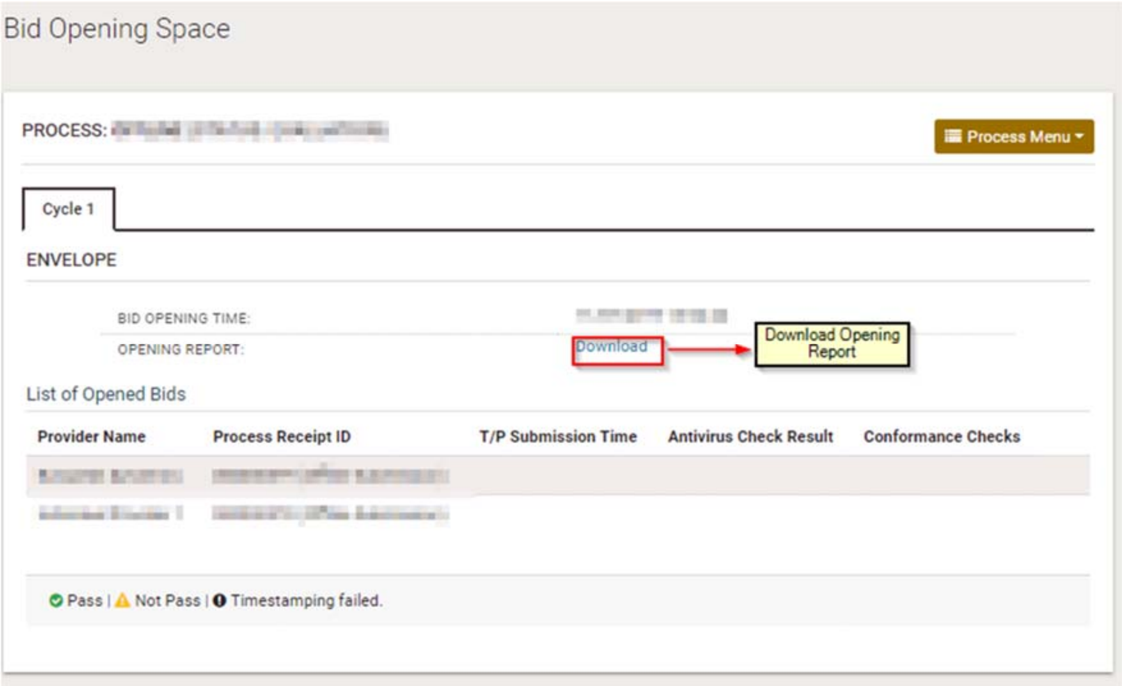


Figure 130: Opened bids list view and opening report

3.10 Evaluation of Bids

Through the task or the respective process menu item, the BEC/BECC users proceed to the evaluation of the bids until the conclusion of the evaluation process.

3.10.1 Conflict of Interest Declaration

Before being granted access to the submitted bids to conduct evaluation, the members of the evaluation committee need to complete the conflict of interest declaration indicating that they are not in a conflicted position with regards to the providers who have submitted bids for the process. A task will be added to the users' task list on their homepage.

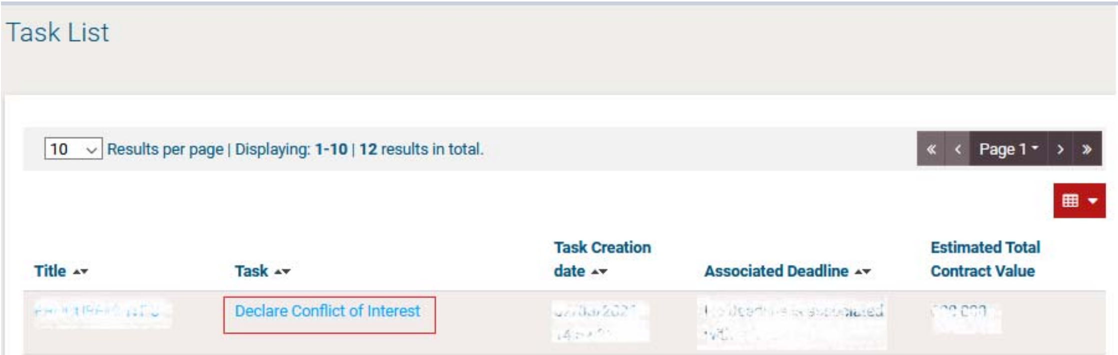


Figure 131: Conflict of interest task

Clicking on the task takes the user to the declaration screen, where they need to provide their declaration status. A comment may be provided if the user selects "**Yes**" for the perceived or actual conflict of interest question. In order to view the list of bidders, the user needs to download the opening report through the provided link.

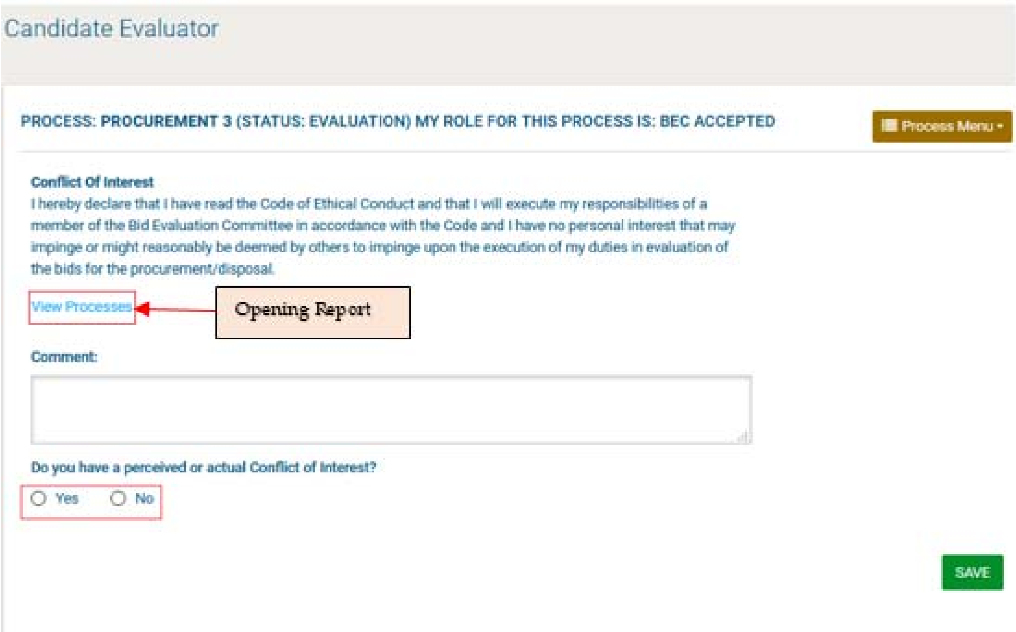


Figure 132: Conflict of interest declaration

3.10.1.1 Replace Evaluator

The PC user is able to view the response status of all members of the evaluation committee from the Process Menu by selecting the "BEC declaration responses" option (Figure 133).

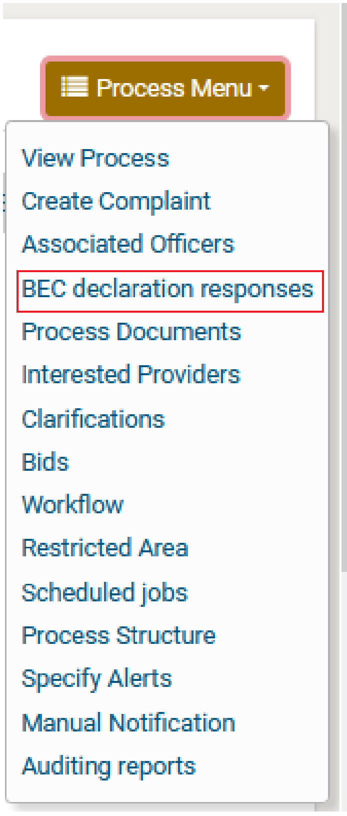


Figure 133: BEC declaration responses menu selection

The results are shown in a table layout indicating the "Code of Conduct" as well as "Conflict of Interest" status of each evaluator.

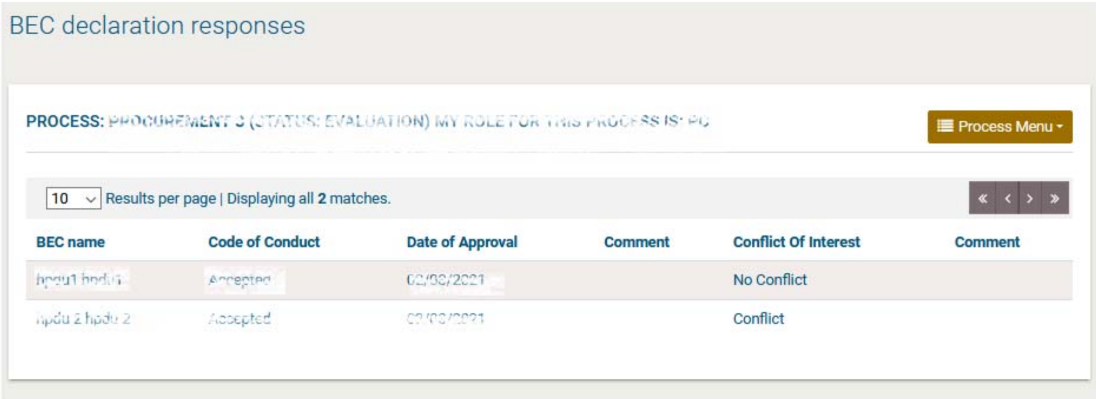


Figure 134: Evaluation committee member declarations

An evaluator who has declared a conflict of interest can be replaced by the PC with another evaluator by accessing the Associated Officers option in the Process Menu (Figure 74). The replacement evaluator must have the same status as the one being replaced, i.e. an evaluator who has not accepted the code of conduct cannot replace an evaluator who has accepted the code of conduct.

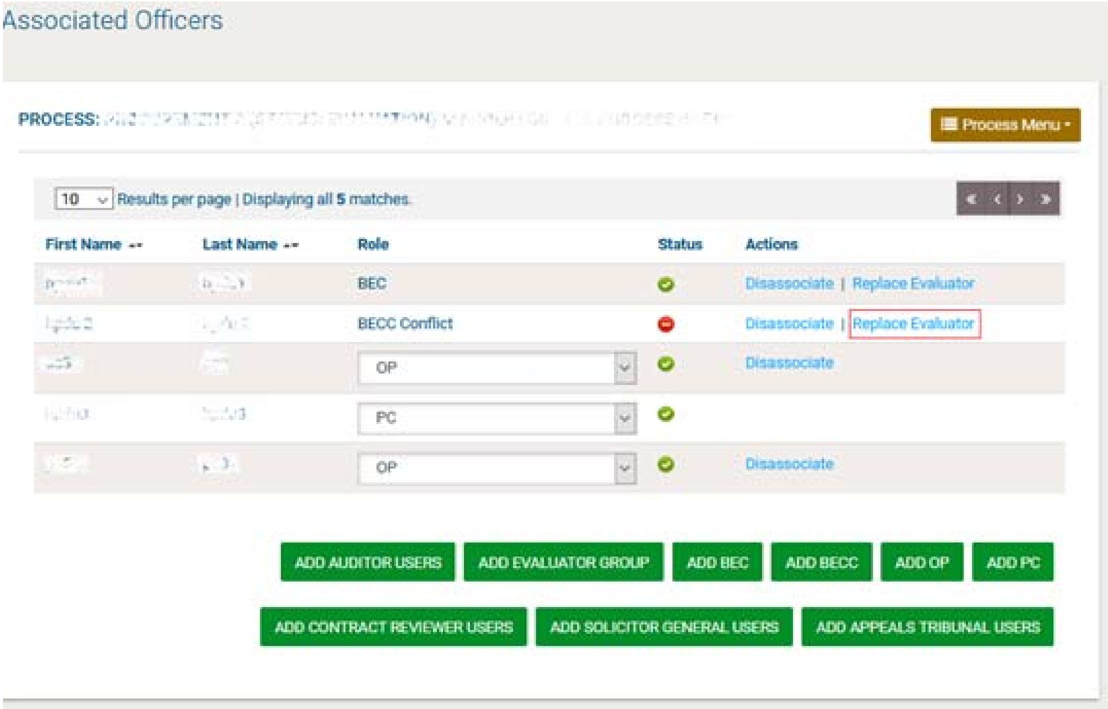


Figure 135: Replace conflicted evaluator

Clicking on the “Replace Evaluator” link launches a pop-up window that allows the PC user to search for a replacement evaluator. Only eligible replacements are shown in the search results. After the replacement of the evaluator, the Resident Due Process Committee will have to review the new association.

RDPCM/RDPCS users have to approve the Bid Notice or the Invitations.
Three RDPCM/RDPCS users in case the Resident Due Process Committee Approval is set to online, one RDPCS user in case it has been set to offline, during the definition of the workflow (3.4).

In case the PDE Entity is a child PDE and it does not contain Resident Due Process Committee users, the process will be handled by the parent PDE Resident Due Process Committee.

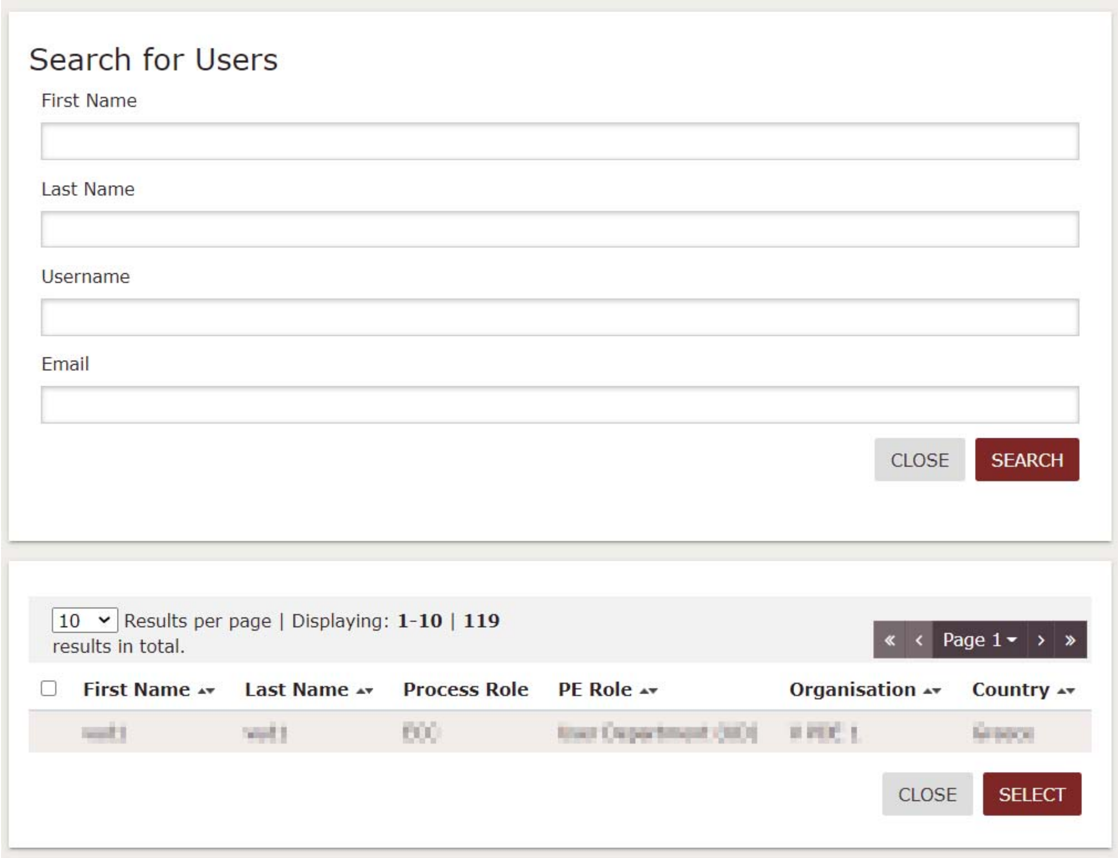


Figure 136: Search for replacement evaluator

3.10.1.2 Disassociate Evaluator

The PC user also has the option to disassociate an evaluator from the Process without replacing them. In this case, the bid evaluation committee size is reduced by one member.

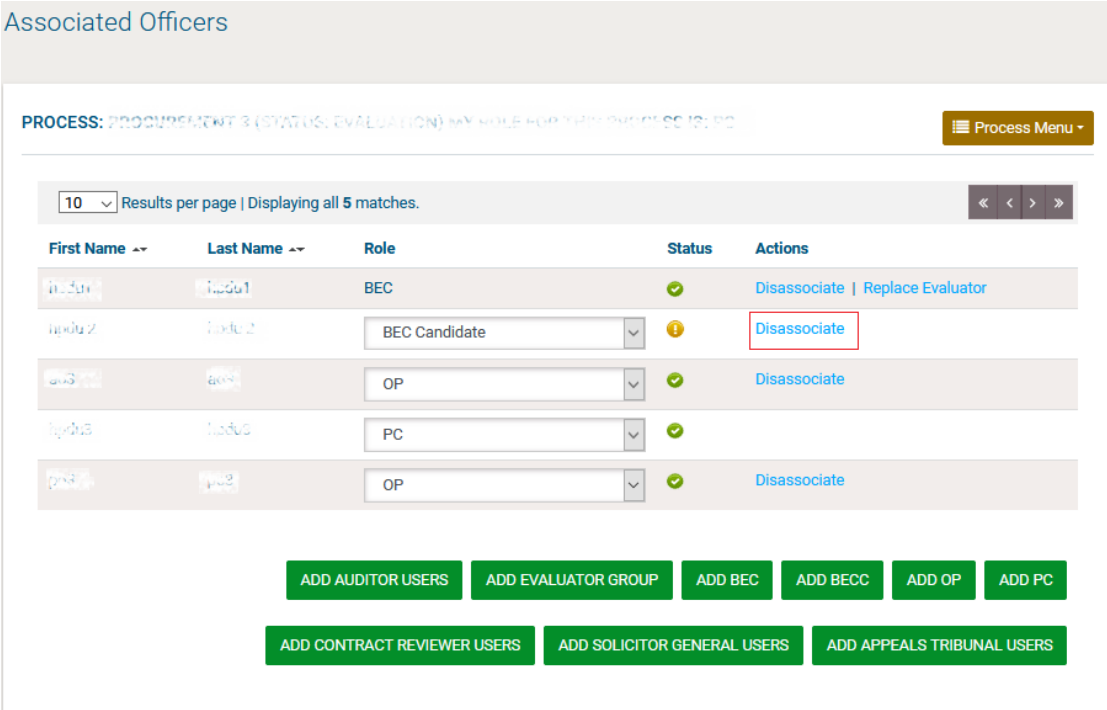


Figure 137: Disassociate conflicted evaluator

3.10.2 Clarifications during Evaluation

During the evaluation phase, the evaluation team of a process may contact a provider that has submitted a bid in order to request additional information and/or obtain clarifications for the bid. To do so, a user may access the "Clarifications" section under the Process Menu (Figure 138).

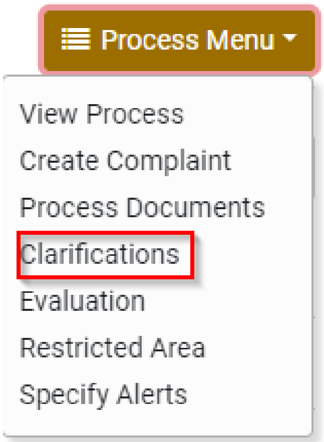


Figure 138: Clarifications link under the Process Menu

Once in the "Clarifications" section, the user must select the "Evaluation Clarifications" tab and then click on the "Requests for clarification" button. This will present to the user a new form for defining the clarification being sought, allowing the user to select the recipient provider(s).

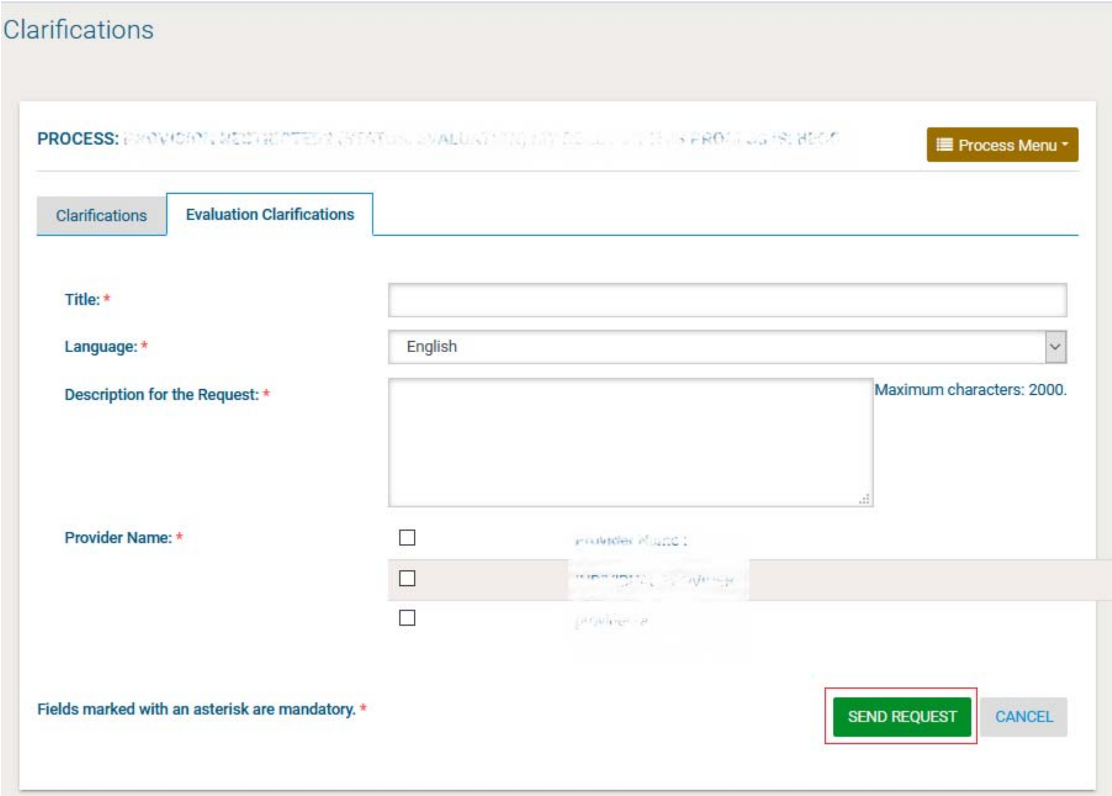


Figure 139: New clarification during evaluation

Once a response is provided by the provider, a new task will appear in the Homepage of the user.

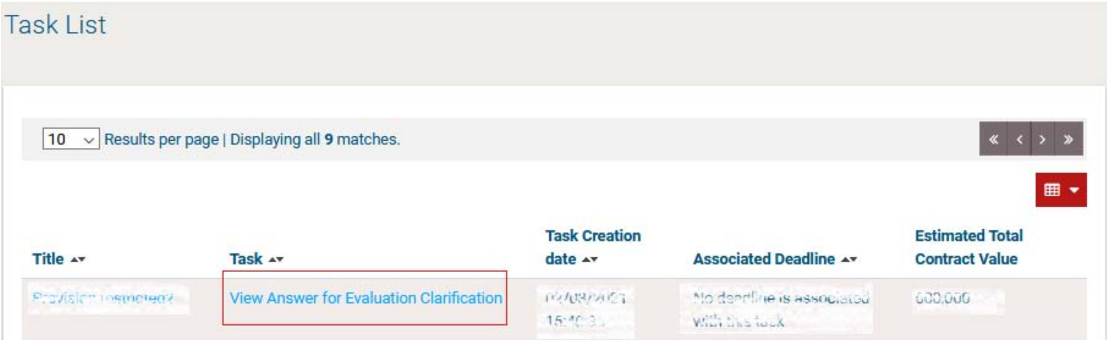


Figure 140: New task for clarification during evaluation

To view the full details of the provider response (Figure 141), the user can click on the task "View Answer for Evaluation Clarification". The PC user also has the option to download a PDF file with all the evaluation clarification responses.

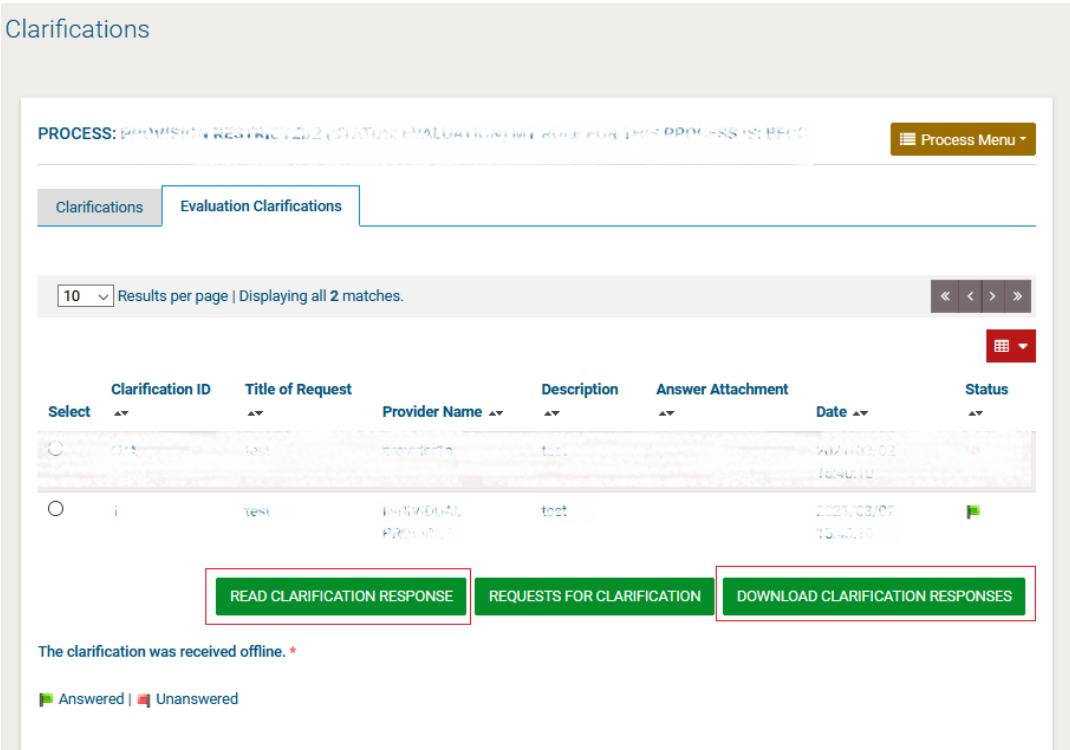


Figure 141: Evaluation clarifications list

3.10.3 Evaluation of Bids

Upon completion of the opening process, the system will generate the "Evaluate bids" task for online procedures or the "Enter offline results" for offline procedures. The user has access to the separate bid of each Provider.

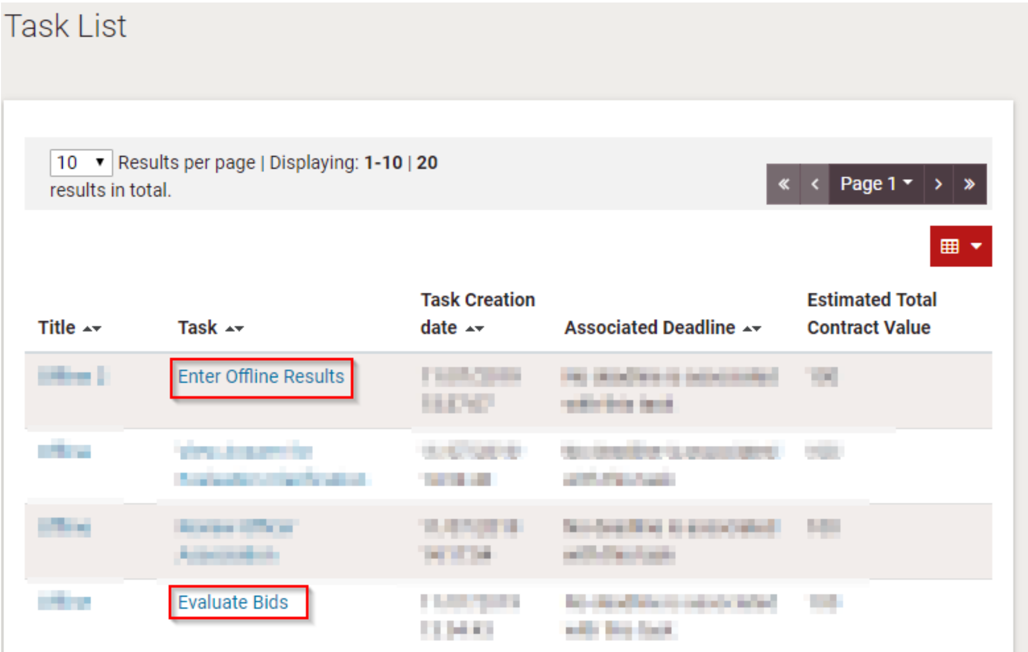


Figure 142: Evaluation task

The user opens each envelope of the bid and populates the respective scores for each criterion.

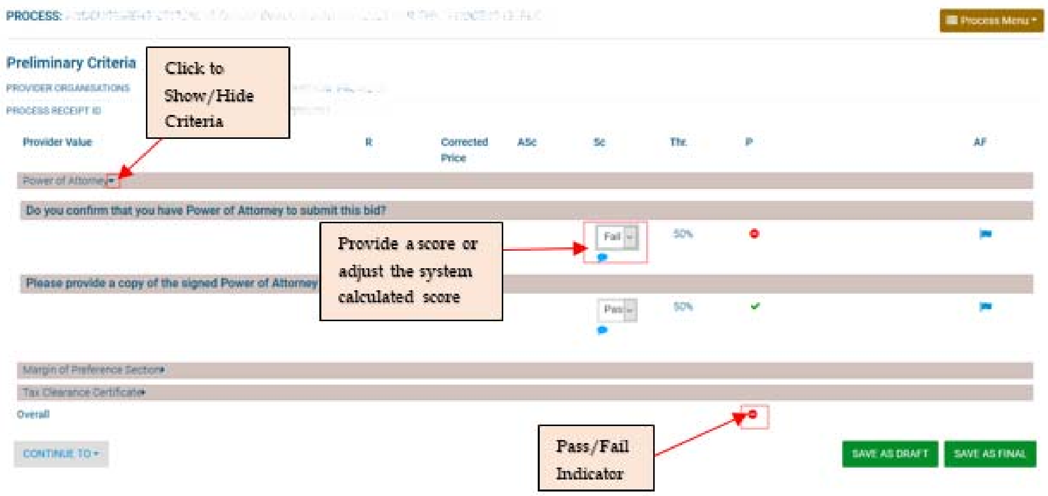


Figure 143: Criteria evaluation

In case and the BEC/BECC users give a Score that is under the current Threshold, the "Justification" field under the Evaluation Score is mandatory for both users. In case the Evaluation Score is over the Threshold given, the Justification is optional.

After all scores are provided, the BECC user will then proceed in finalising the evaluation process and generate the respective evaluation report. The BECC user will be able to proceed to finalising the evaluation process if at least one member of the bid evaluation committee has provided an evaluation for each provider bid. All members do NOT have to evaluate all bids in order for the process to continue. The evaluators are able to proceed with next envelope only in case the previous envelope is finalised.

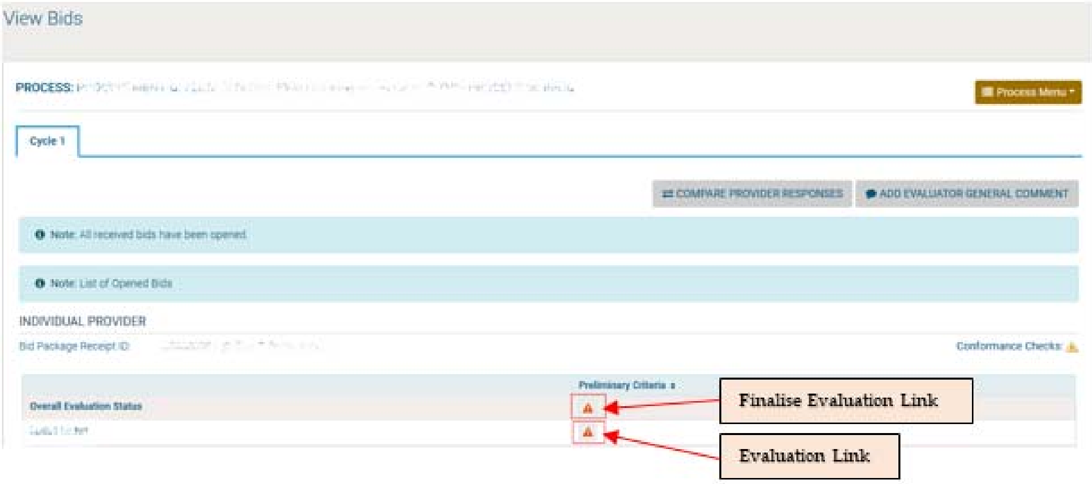


Figure 144: Preliminary Criteria Evaluation

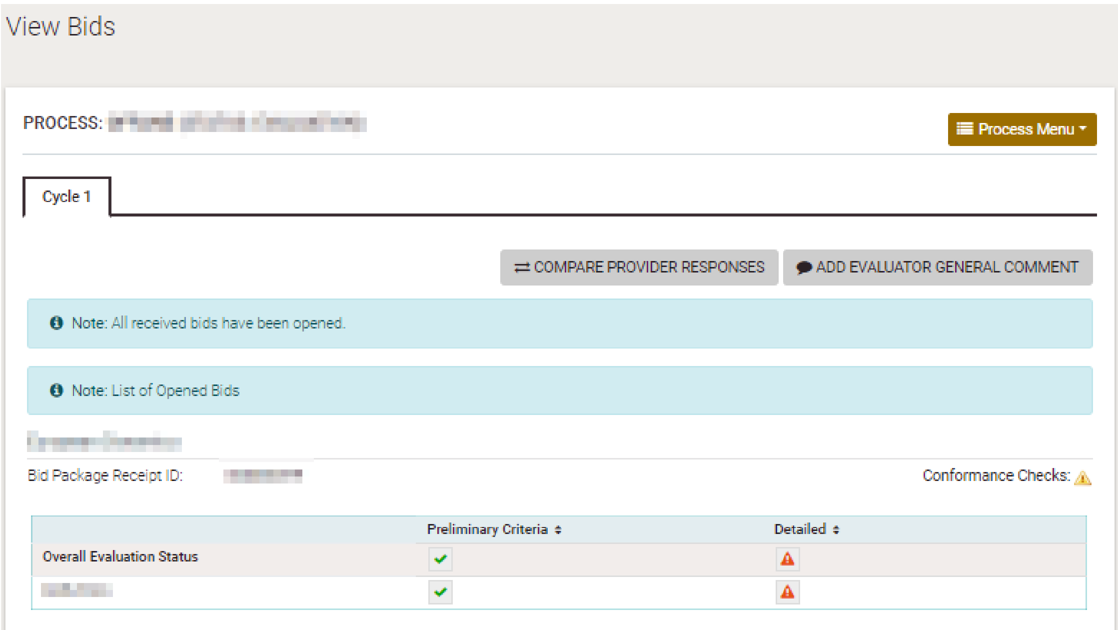


Figure 145: Detailed Criteria Evaluation

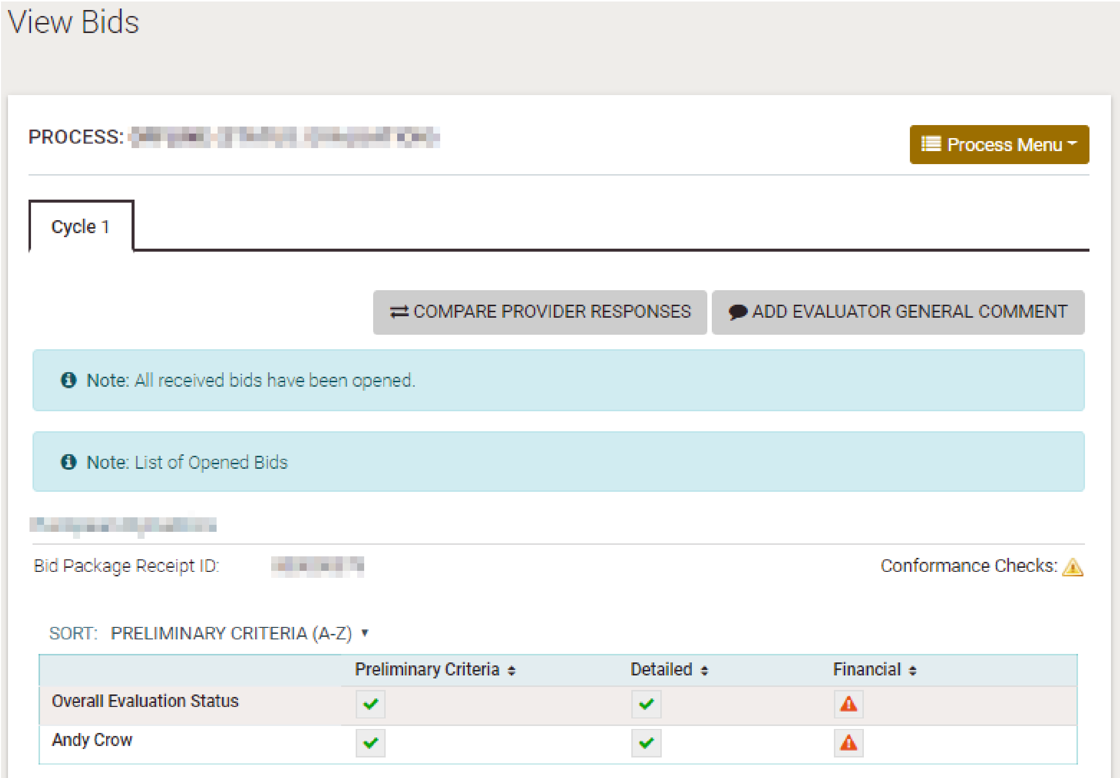


Figure 146: Financial Criteria Evaluation

In case the finalized financial value of the provider is modified during the evaluation, the corresponding provider admin user will be tasked to approve the updated financial value. The BEC and BECC users can be informed when they pass over the check icon .

In case the provider admin user selects the "accept" option, the financial value will be automatically updated. In case the provider admin selects the "reject" option, the financial value will not be modified and the reason for the rejection will be sent back to the BECC.

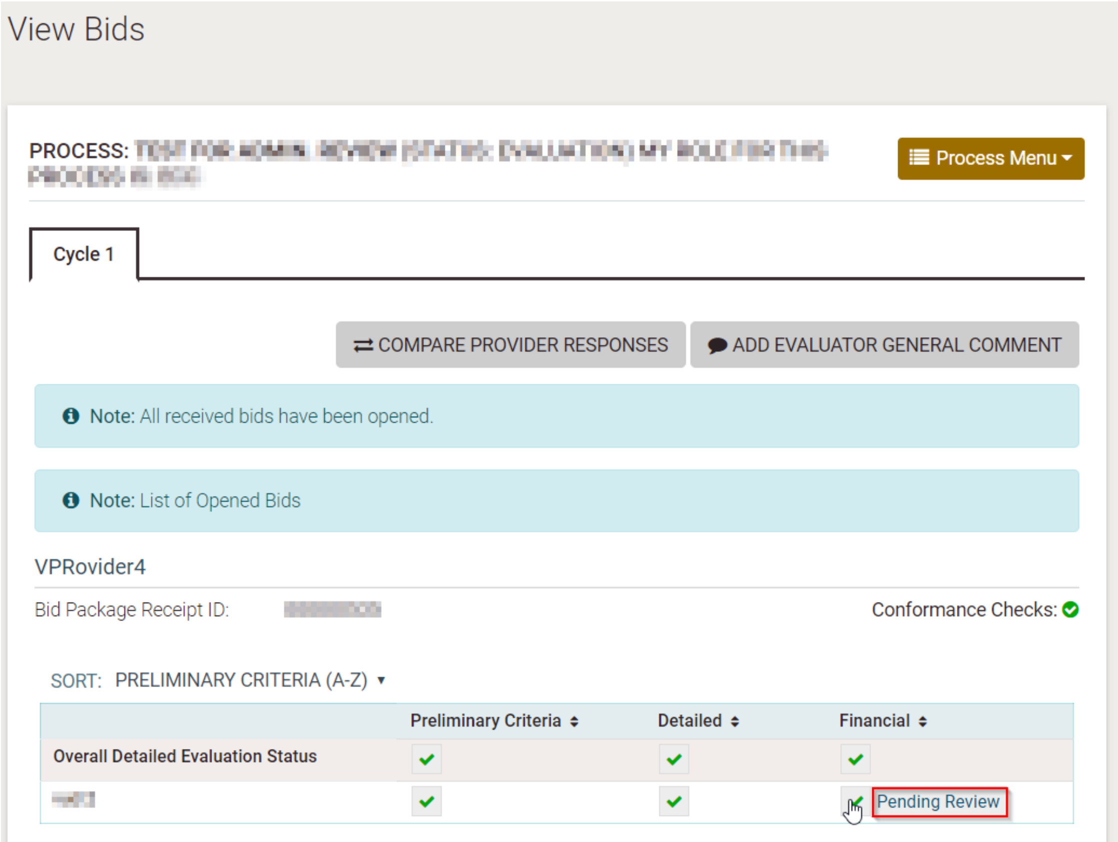


Figure 147: Financial Value Pending Review from Provider

The BECC user has three options available when reviewing the evaluations of each member of the bid evaluation committee:

Accept the information provided and finalise the evaluation;

Request re-evaluation by one or more evaluator;

Discard one or more evaluations from the results (the scores are recalculated by the system to remove these evaluations from the final results).

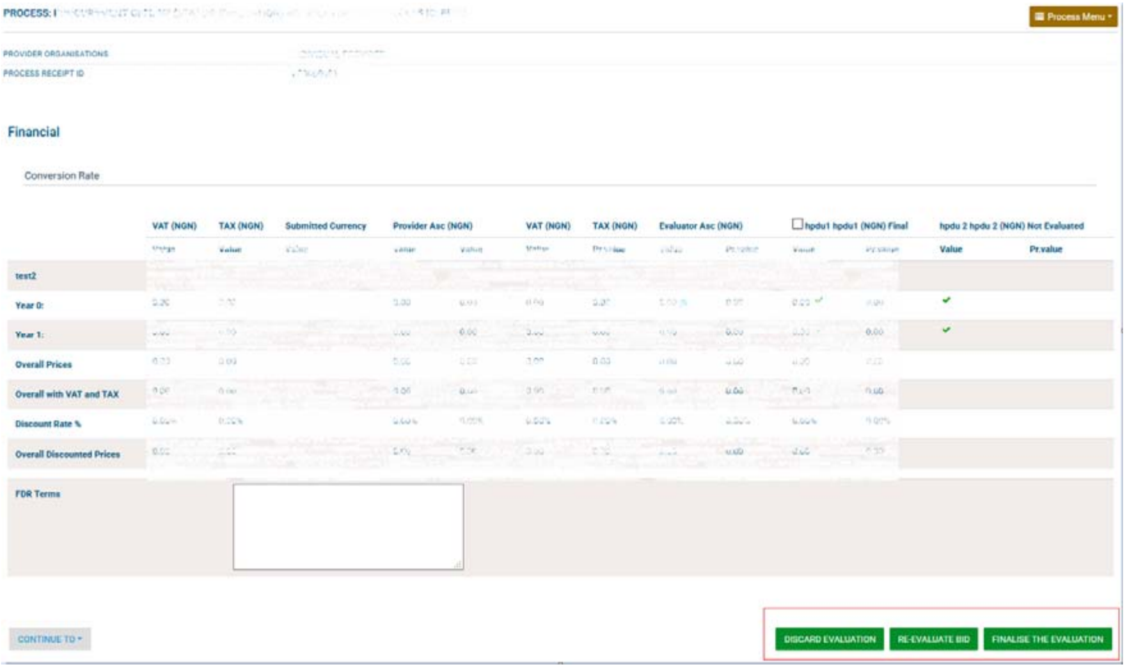


Figure 148: Review individual evaluations

3.10.4 Postqualification

When all bids have been finalised the BECC user, if the process was configured to include a postqualification step, the members of the evaluation committee can access the respective page through the "Postqualifications" option in the Process Menu (Figure 150) or through the "Postqualifications" task available in the BECC task-list.

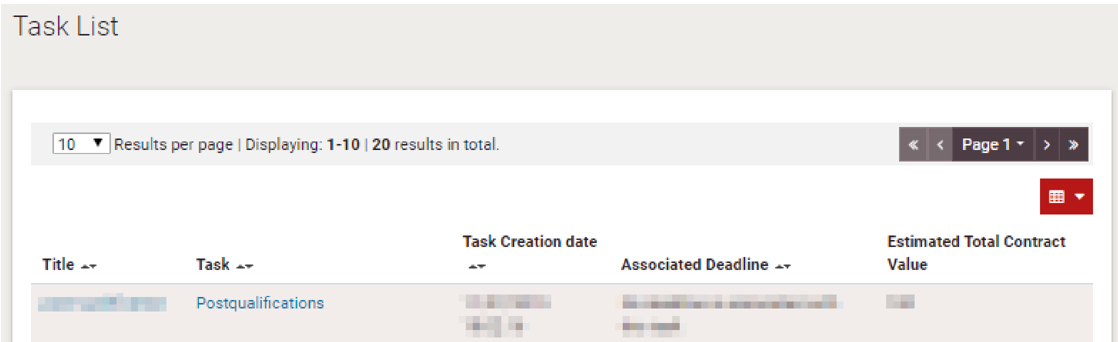


Figure 149: Postqualifications task

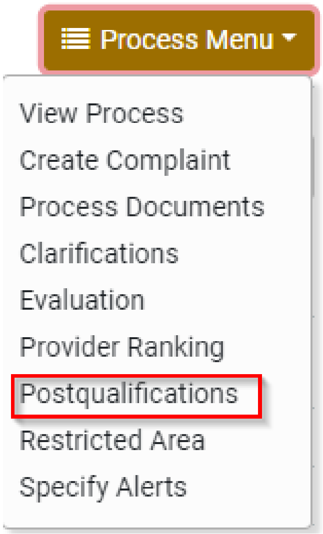


Figure 150: Postqualification menu selection

In the section of postqualifications the system provides the following functionality to the user:
To read all the postqualification responses which have been submitted by Providers.
To insert postqualiciation requests to the Best evaluated Provider.
To conclude the postqualifications period.

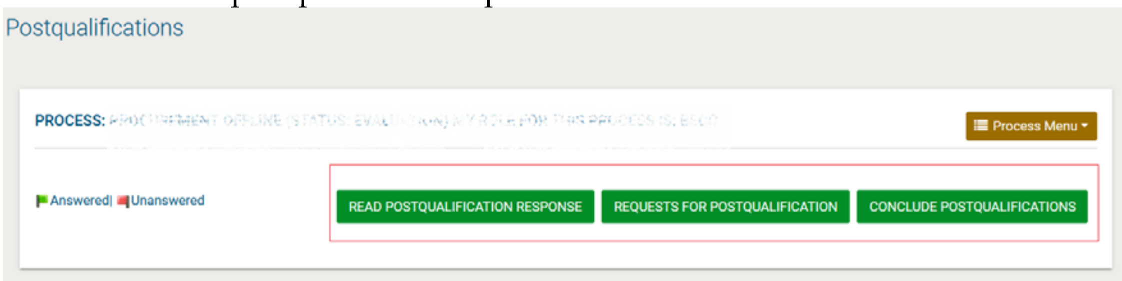


Figure 151: Postqualifications page

A request for postqualification must be compiled to be sent to the winning bidder by completing the form.

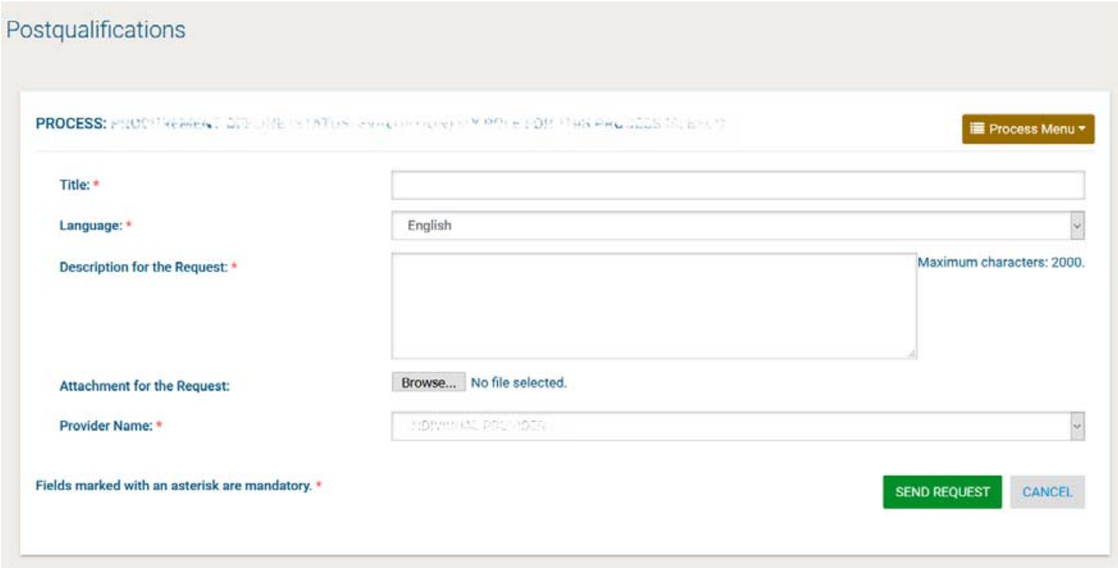


Figure 152: Request for postqualification

Through the respective task or the "Postqualifications" menu item in the process's menu the user may navigate to view the response provided by the provider.

If the response is acceptable, the user simply presses the "Back" button to acknowledge that they have read the response. If the response is not acceptable, the BECC user can disqualify the provider by clicking on the "Disqualify Provider" button.

Figure 153: View postqualification response

The BECC user needs to end the postqualification process by clicking on the "Conclude postqualifications" button. If there are still unanswered postqualification requests in the system, the BECC user is prompted to confirm that these will be discarded before continuing.

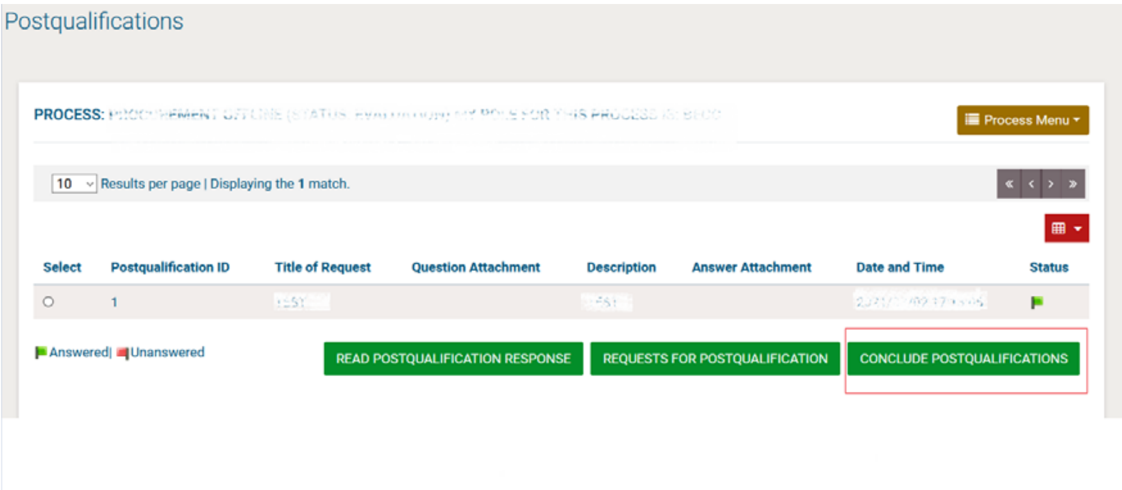


Figure 154: Conclude the postqualification phase

After the conclusion of the postqualifications the user is tasked to generate the evaluation report.

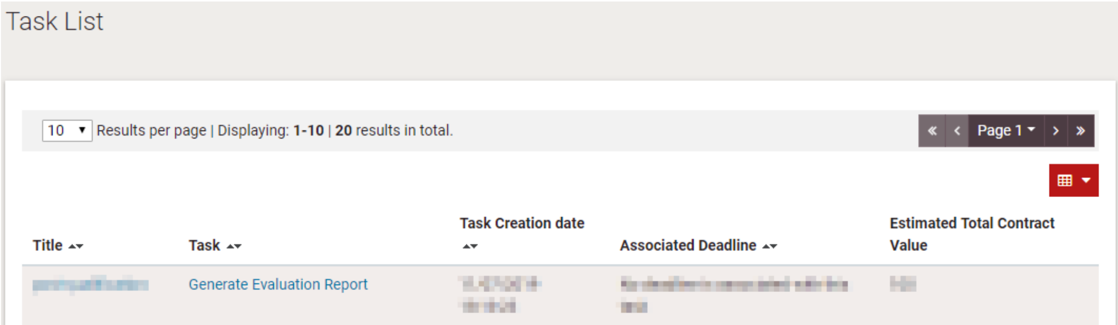


Figure 155: Generate evaluation report task

The user clicks the Generate Evaluation Report button in order the evaluation report to be generated by the system. For every provider that has not been ranked 1st, the BECC should provide a mandatory comment.

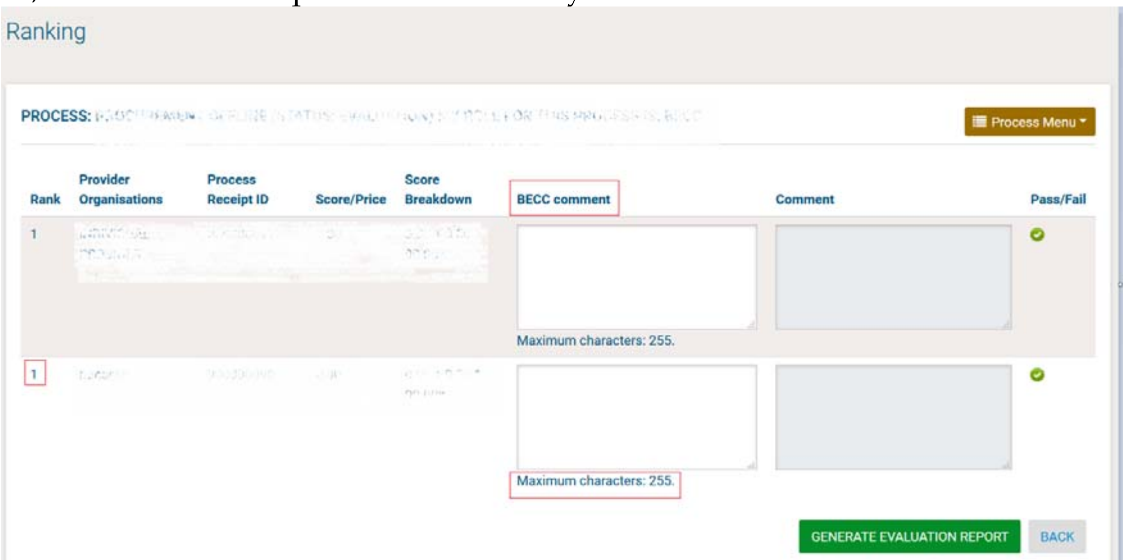


Figure 156: Generate Evaluation Report page

3.10.5 Evaluation Report

Once evaluation results are finalised all BEC users will have the task to approve the new Evaluation report. Through the respective task or the "Evaluation Report" menu item in the process's menu the user may navigate to the respective page.

Figure 157: Evaluation report menu item page

All BEC users (including the BECC) will need to approve or reject the evaluation report.
In case an BEC user rejects the evaluation report, the BECC user will only be in position to upload a new version of the evaluation report. This is only applicable when all BEC members have rejected the report. One rejection out of 6 BEC users, for example, does not require the BECC to re upload the evaluation report.

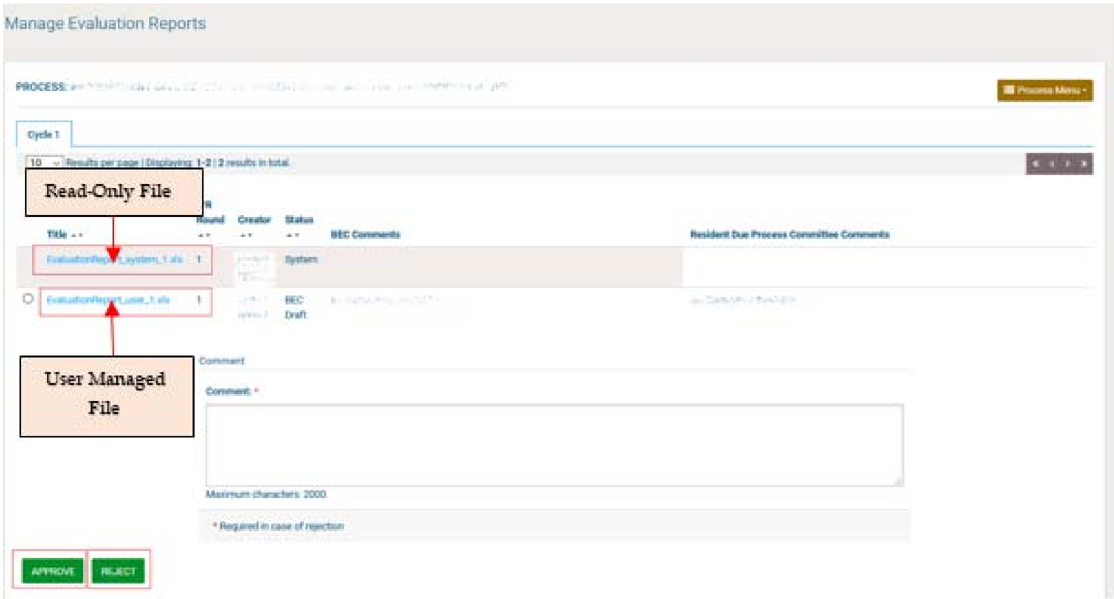


Figure 158: Approve / Reject Evaluation Report

3.10.6 Manage Evaluation Report

Once approved by all evaluators, the RDPCM/RDPCS (3 RDPCM/RDPCS users in case the Resident Due Process Committee Approval is set to online, 1 RDPCS user in case it has been set to offline during the definition of the workflow 3.4) of the PDE will need to authorise the completion of the evaluation process by providing the final approval. If deemed appropriate, the user may reject the whole evaluation and revert the flow back to the opening ceremony.

In case the PDE Entity is a child PDE and it does not contain Resident Due Process Committee users, the process will be handled by the parent PDE Resident Due Process Committee users.

If the financial value of the top ranked responsive process exceeds the estimated amount, then an attachment field and an additional option “conduct negotiations” is also available.

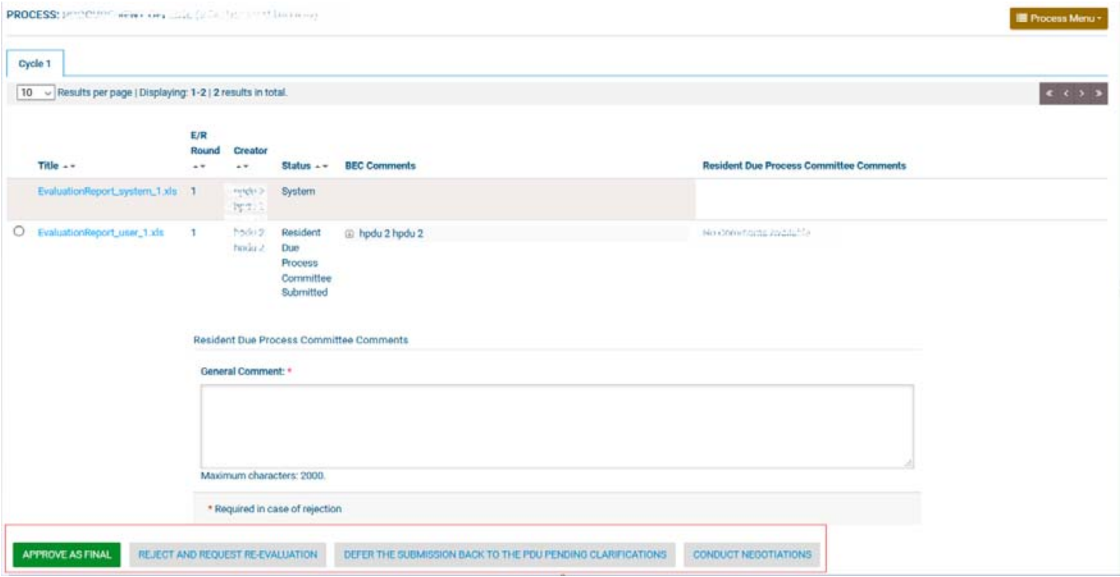


Figure 159: Conclude evaluation

In case the Resident Due Process Committee selects to Conduct Negotiations, the PC user will then have the task "Conclude Negotiation" at his task list. Keep a note that the Negotiations take place offline.

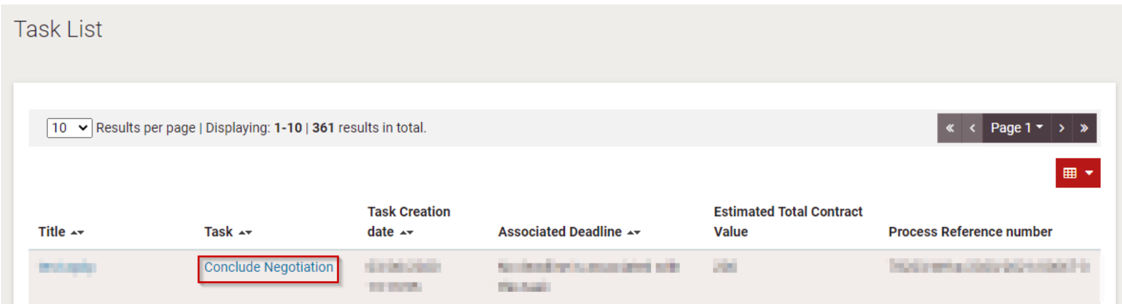


Figure 160: Conclude Negotiation task - PC task list

Upon clicking on the aforementioned task, the PC user will be able to conclude the negotiations. The PC user, will have to provide all the mandatory information, select the following action and click on the "Save" button.

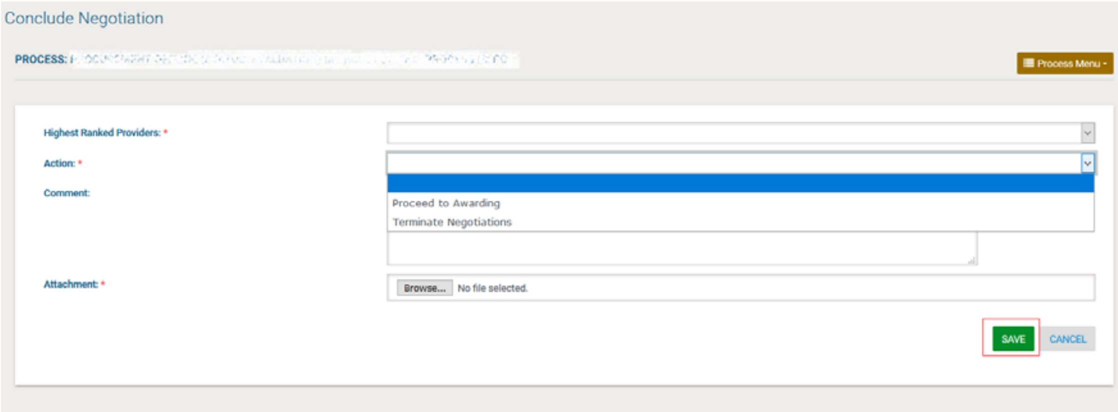


Figure 161: Conclude Negotiation

After the conclusion of the evaluation the Resident Due Process Committee will have a new task at their task list, in order to approve the negotiation outcome.

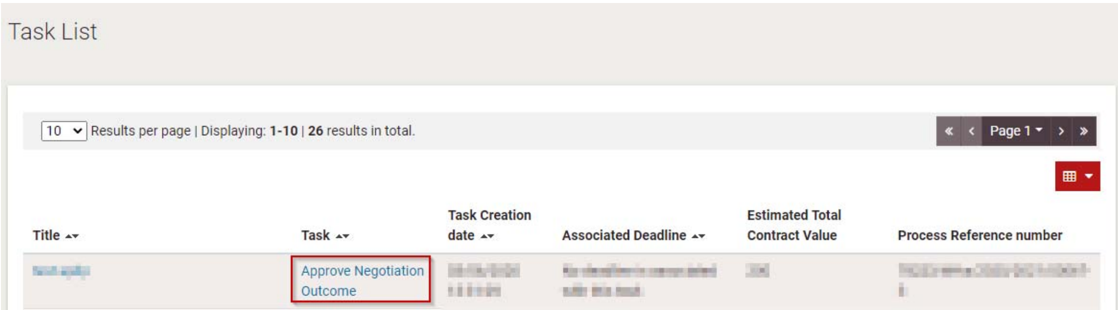


Figure 162: Approve Negotiation Outcome task – Contracts Committee task list

The Resident Due Process Committee will then have to provide the mandatory information, they may also view the recommended action of the PC user, select an action and then click on the "Save" button.

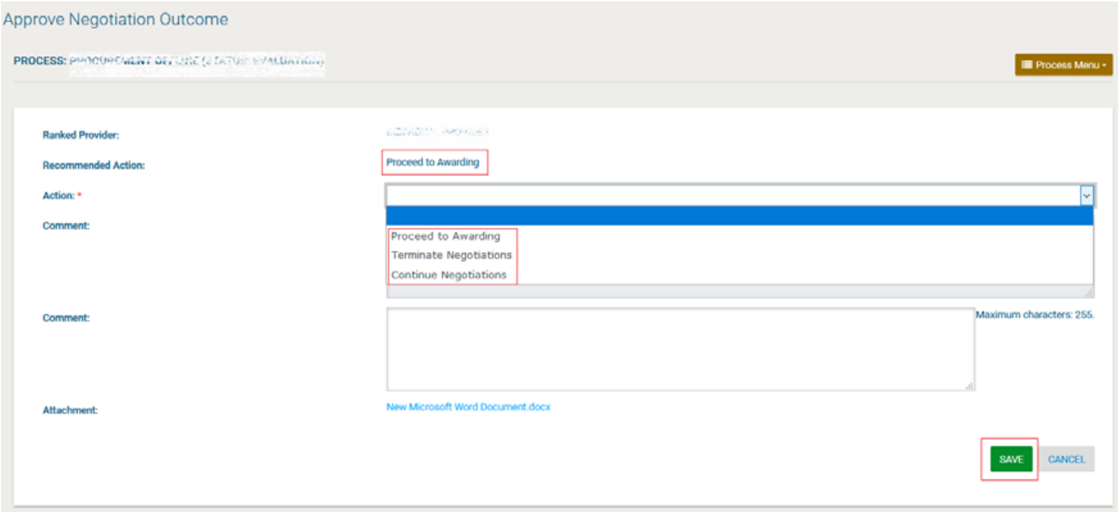


Figure 163: Approve Negotiation Outcome task

In case the user selects the option “Proceed to Awarding”, the process will continue as it is explained in the following steps. If the user selects the “Terminate Negotiations”, the process will be cancelled. Finally, if the user selects the “Continue Negotiations”, the process of the negotiations will start over again.

The PC represents the decision of the procurement committee and enters the appropriate comments into the e-GP system.

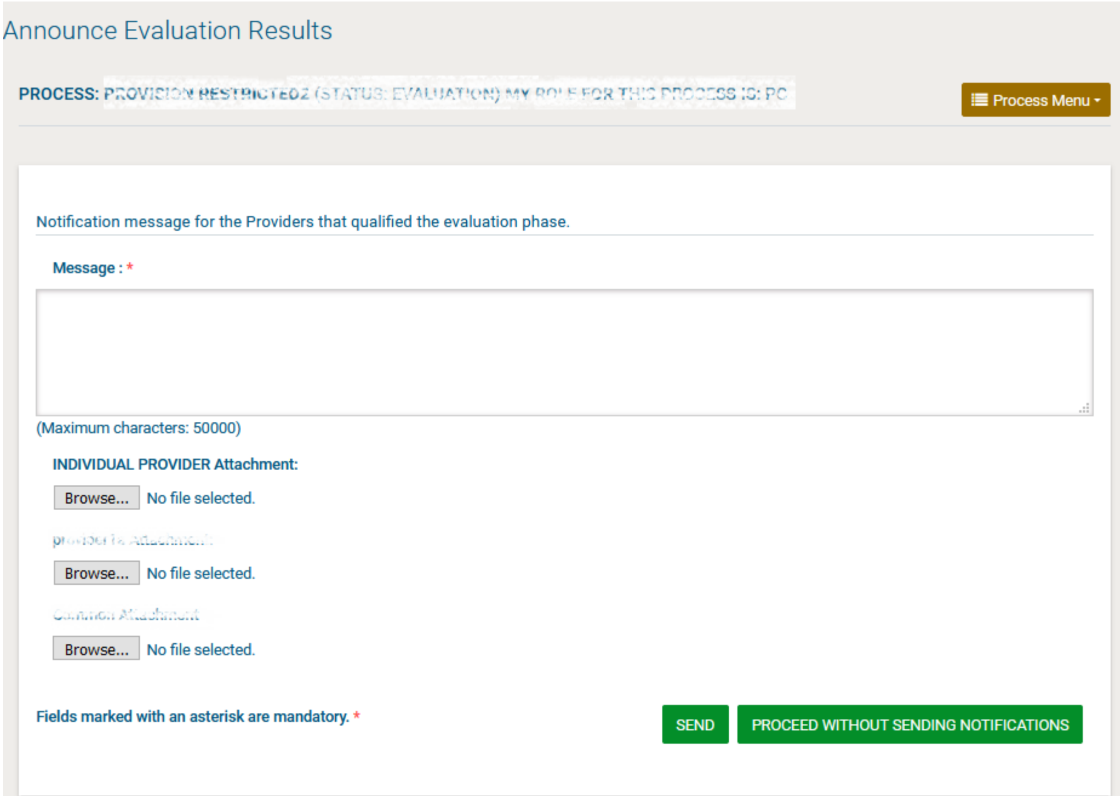


Figure 164: Post Anouncement of Results

3.10.7 Complaints

After the publication of the Process Notice up to the end of the Standstill period, users are allowed to submit their complaints. Authenticated and non-authenticated users will be able to submit their complaints. Through the "Create Complaints" menu item in the process's menu the user may navigate to the respective page.

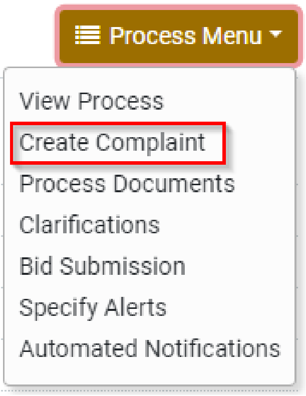


Figure 165: Feedback menu item

At “Create complaint” page, the user can create his complaint providing the following information:

- Title
- Email address
- Full name
- Description
- Attachment for the Request
- CAPTCHA

And then click on the “Save” button in order to submit it.

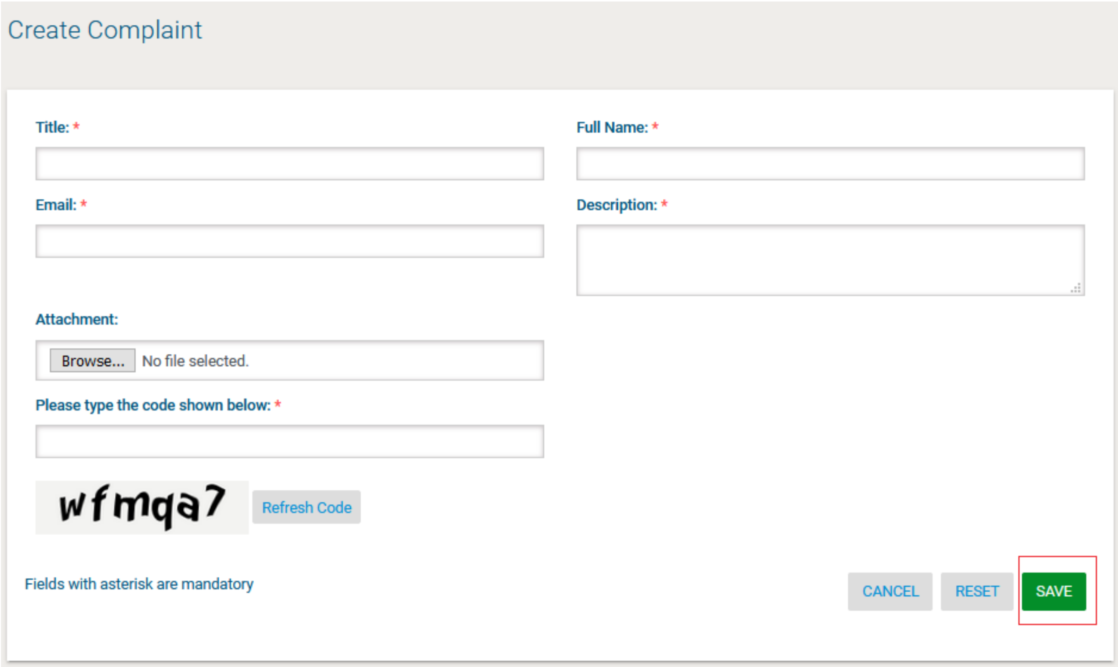


Figure 166: Create Complaint

The submitted requests from users are presented in a table layout (Figure 167).

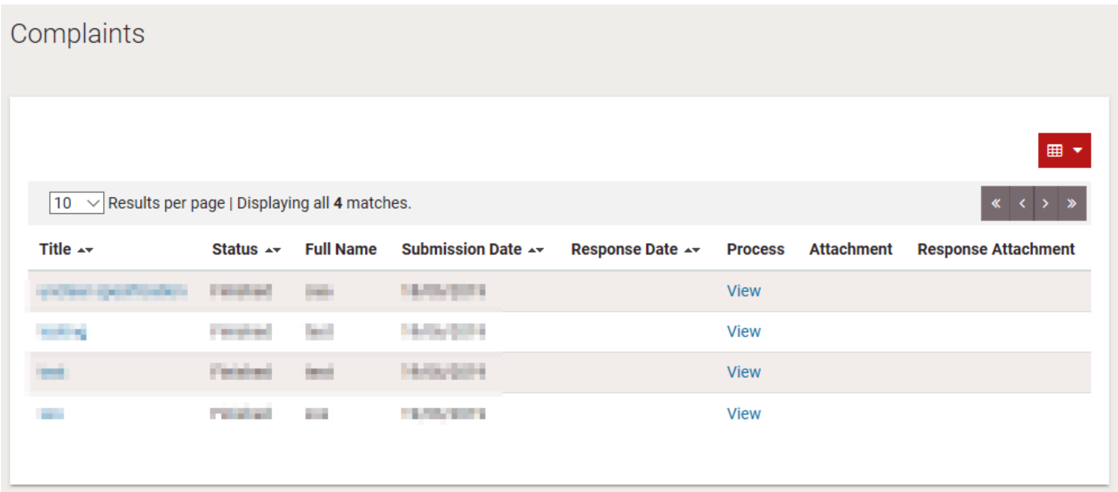
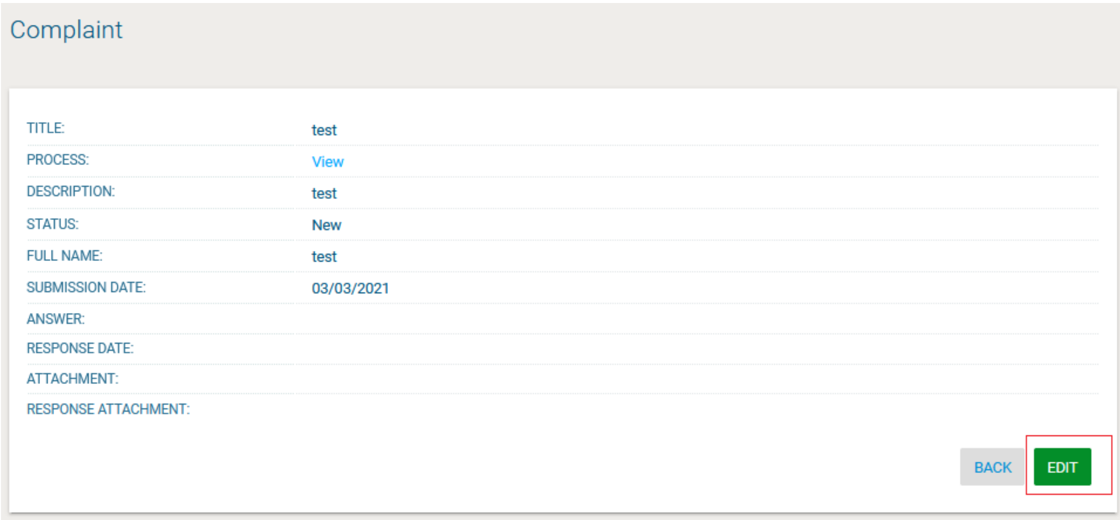


Figure 167: List of Complaints

AO user of the corresponding PDE will be tasked to review the complaint and provide a response.
When a complaint is received, PDE has 10 working days in which to respond. The AO user will be able to respond to a complaint only within the 10 working days period. The system will remind the AO 5 working days before the expiration of unanswered complaint.
In case the AO doesn't respond within the 10 working days period, the complaint will be automatically archived.

Saving the response in "Final" status makes it available to the provider. If the AO user needs to consult with other team members before finalising the response, it can be saved in "Draft" status until it is ready to be sent to the requestor.



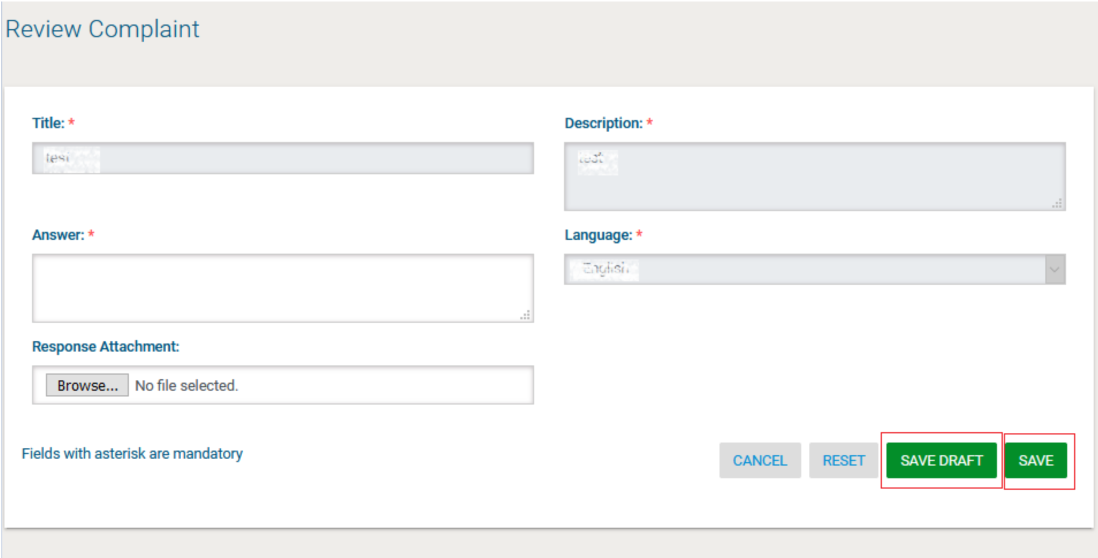


Figure 168: Respond to feedback request

3.11 Administrative reviews

During Standstill period, providers participating in the process who are aggrieved by a decision of Procuring and Disposing entity will be able to apply for Administrative Review to the Accounting Officer of the corresponding PDE, through the "Administrative Reviews" area available under the process menu button. As soon as an administrative review is requested the process status changes to Suspended. The process workflow cannot be resumed until all administrative reviews have been finalised. Through the "Administrative reviews" menu item in the process's menu the user may navigate to the respective page.

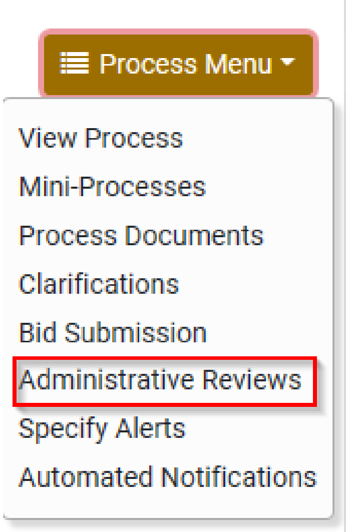


Figure 169: Administrative reviews menu selection

Providers that want to apply for Administrative Review will have to complete a payment first. The fee for the Administrative Review depends on the estimated value of the procurement or disposal processes.

Upon submitting a complaint to the AO, AO user of the PDE will be tasked to review the complaint and provide a response.
There will be a new task at this task list, the "Review Complaint to the Accounting Officer". By selecting that the user may navigate to the respective page.

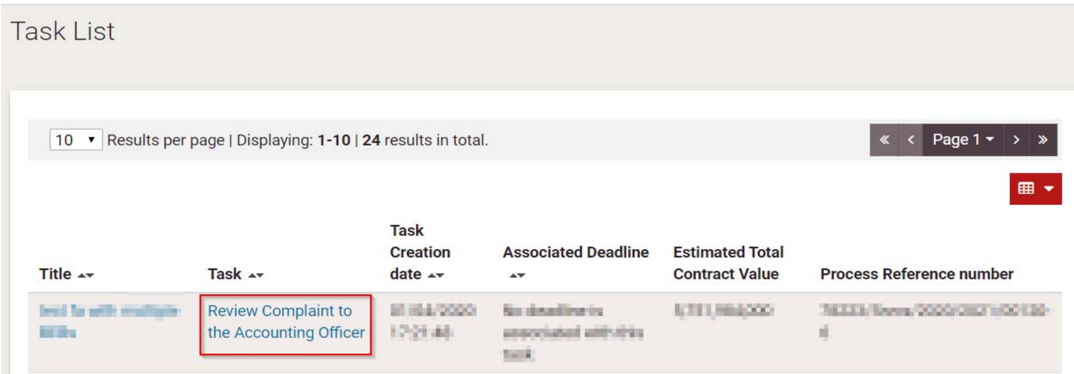


Figure 170: AO task list - Review Complaint to the Accounting Officer

The AO user will select the administrative review and then will click on the "View/Edit" button in order to give his answer.
If the AO accepts the administrative review the outcome can be: Cancel Process, Disqualify Bid, Reject and Re-evaluate. If the AO rejects it, then the outcome can only be Proceed to Awarding.

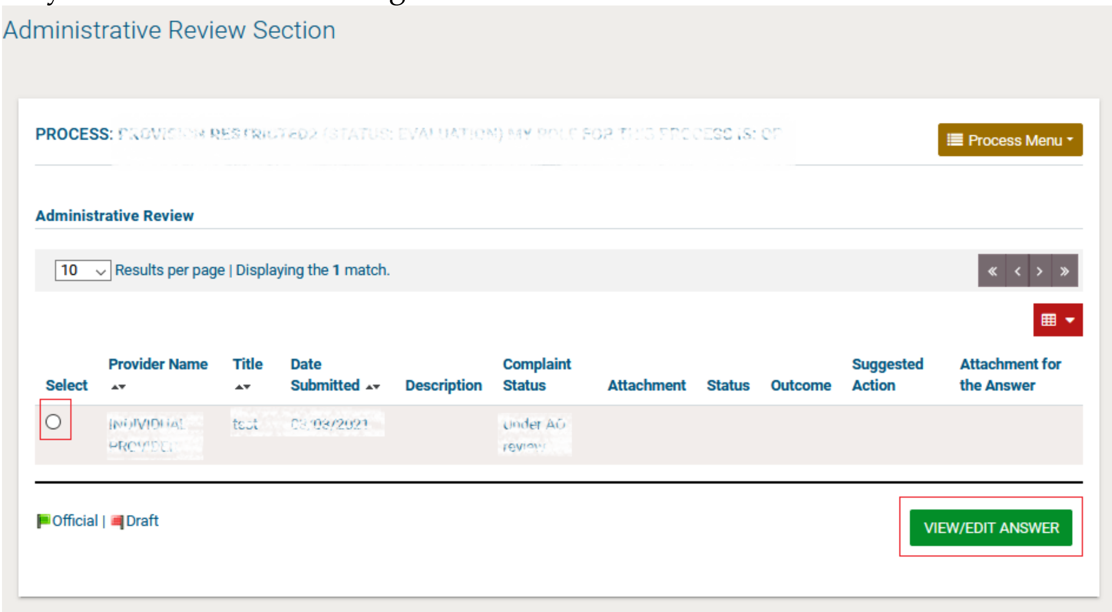


Figure 171: Select and edit Administrative Review

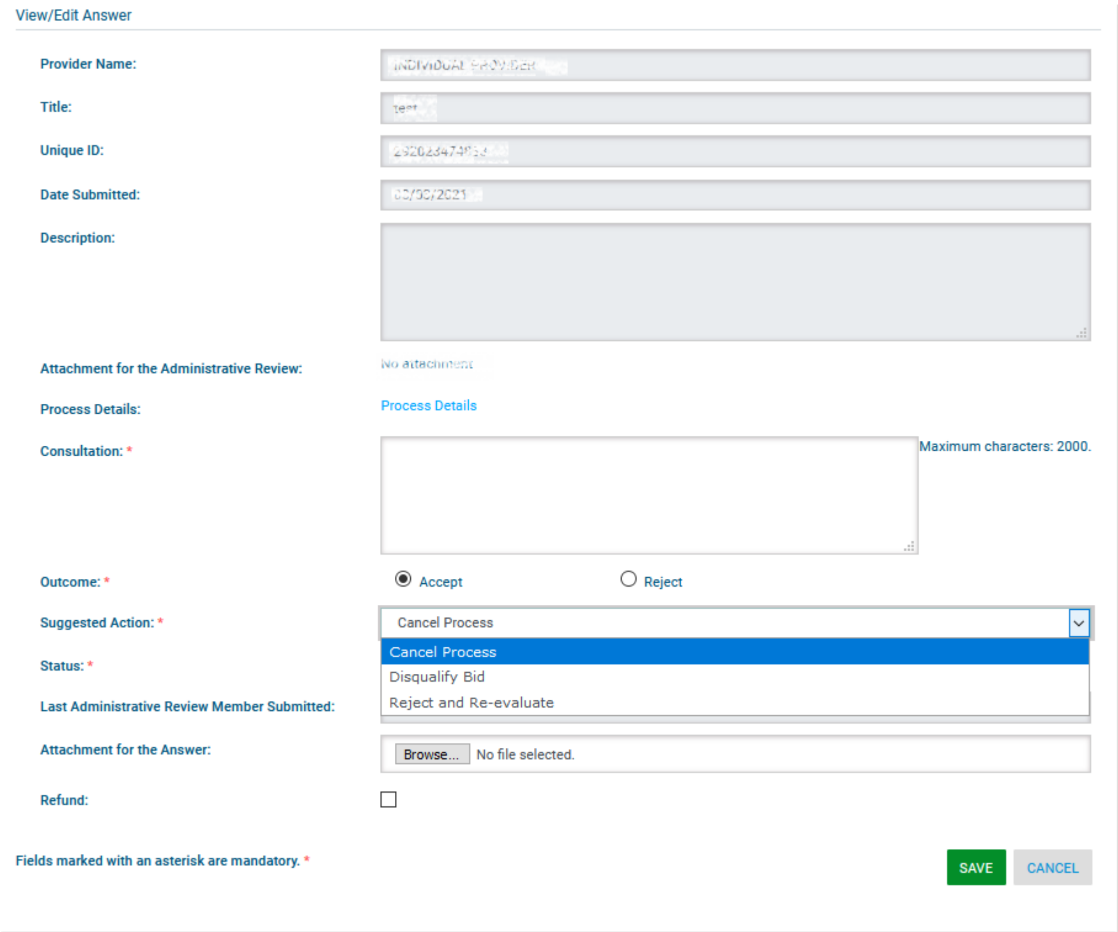


Figure 172: Submit Administrative Review

After the AO submits his response a new task will be available to the provider, in order to view the details of his complaint to the Accounting Officer.

If the provider is not pleased with the AO's answer, he can send an administrative review to the Authority (KADPPA).

The AO user of the KADPPA (the organisation designated with the compliance monitoring flag) will be able to view all complaints to the Authority submitted through a separate facility.

The AO user will be able to assign one (or more) Complaint Reviewers, as reviewer for any complaint to the Authority filed for a Process. Once a new complaint to the Authority is filed and if no members have been assigned as "Complaint Reviewers", the AO will have a task to "Assign Complaint Reviewer".

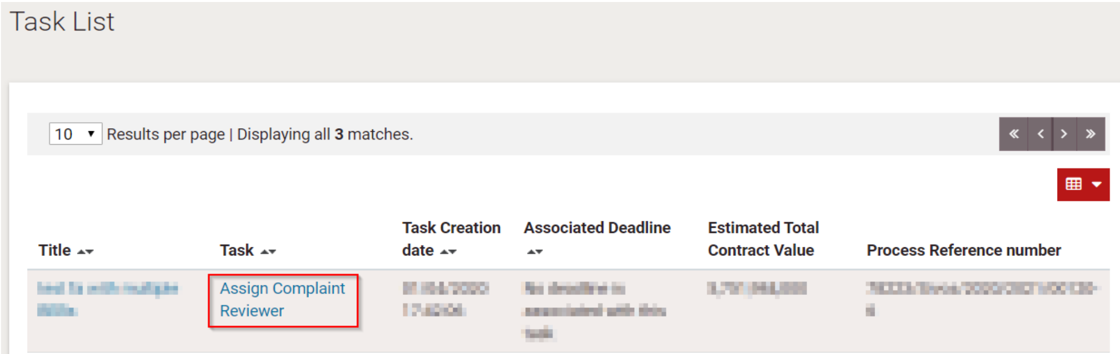


Figure 173: Assign Complaint Reviewer task

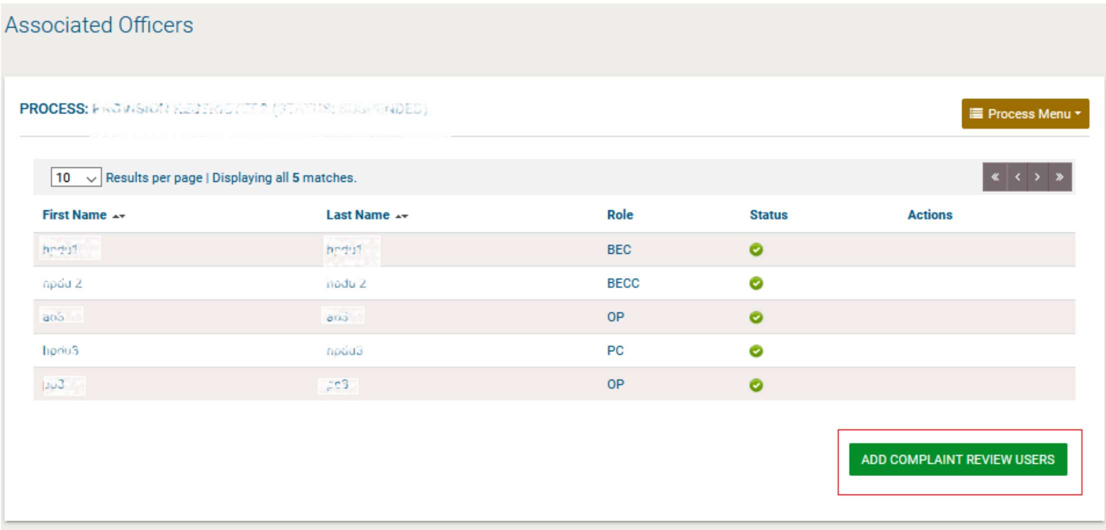


Figure 174: Associate complaint review user(s)

The Complaint Reviewer(s) associated with a process to review complaints to the Authority, will have in their homepage task list the task to "Review Complaint". The task will not be removed until all filed complaints to the Authority are approved or rejected by the "Complaints Reviewer".

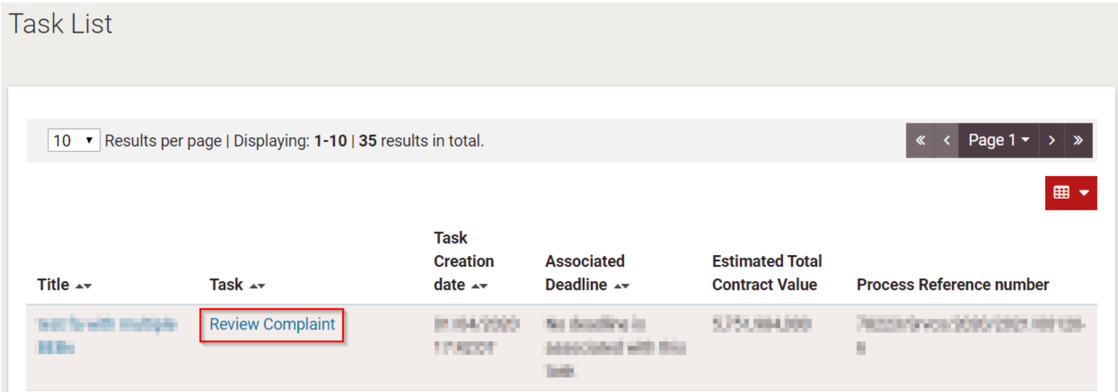


Figure 175: Complaint Reviewer task list- Review Complaint

The AO from KADPPA will select the administrative review and then will click on the "View/Edit" button in order to give his answer.
If the AO accepts the administrative review the outcome can be: Cancel Process, Disqualify Bid, Reject and Re-evaluate. If the AO rejects it, then the outcome can only proceed to Awarding.

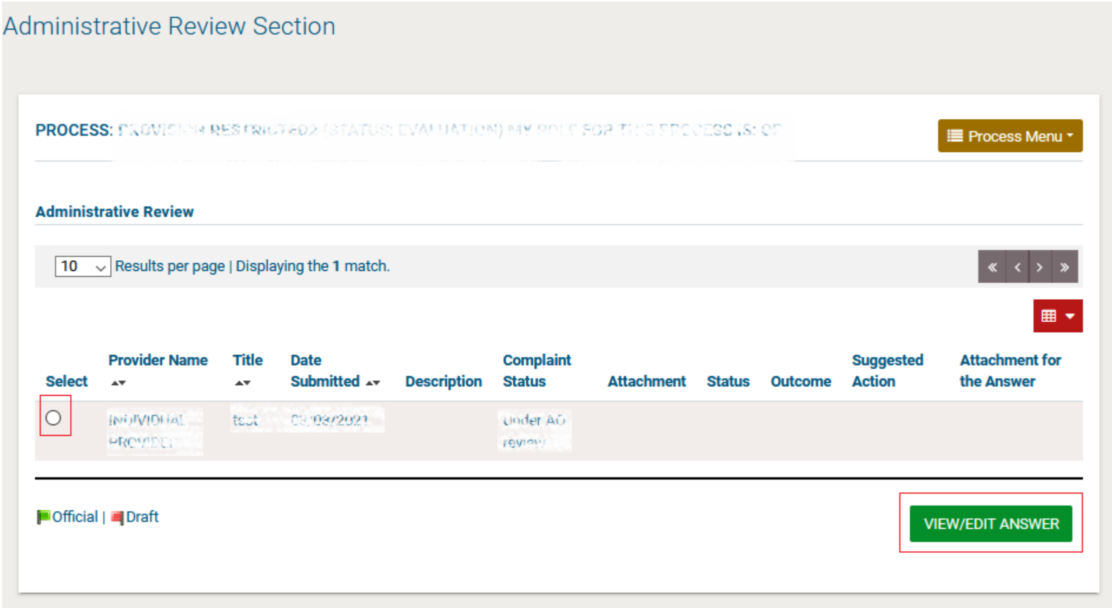


Figure 176: Select and edit Administrative Review

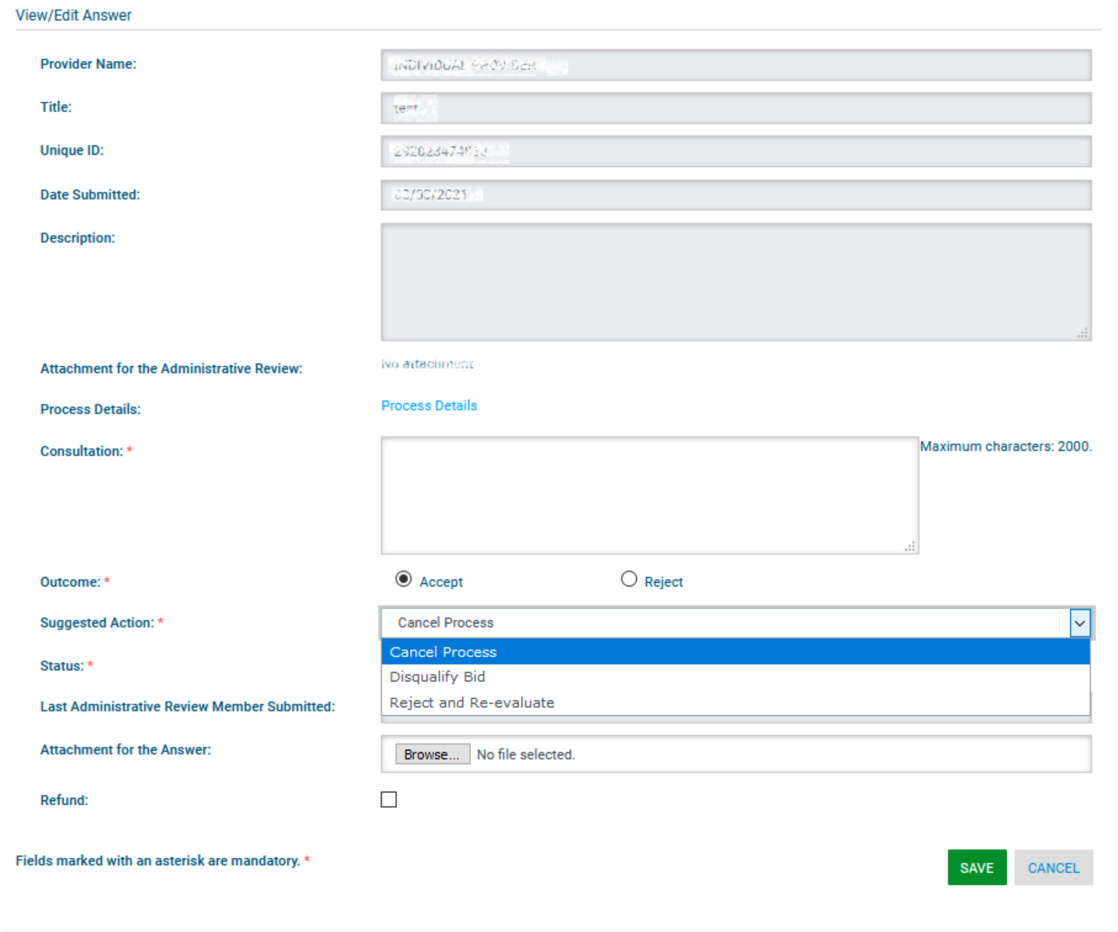


Figure 177: Submit Administrative Review

After the AO submits his response a new task will be available to the provider, in order to view the details of his complaint to the Accounting Officer.

In case the AO user accepts the provider's complaint and the deadline of the 10 working days has passed, the PC user will have to act on the Administrative Review Outcome. (See Figure 180 and Figure 181)
If the provider is not pleased with the AO's answer, he can send an appeal to the Tribunal, by clicking on the "Administrative Reviews" option under the Process menu.

The PC will be able to view all appeals submitted through a separate facility. Once a consultation has been saved as “Official”, PC users of the Process will be tasked to associate an Appeal tribunal user.

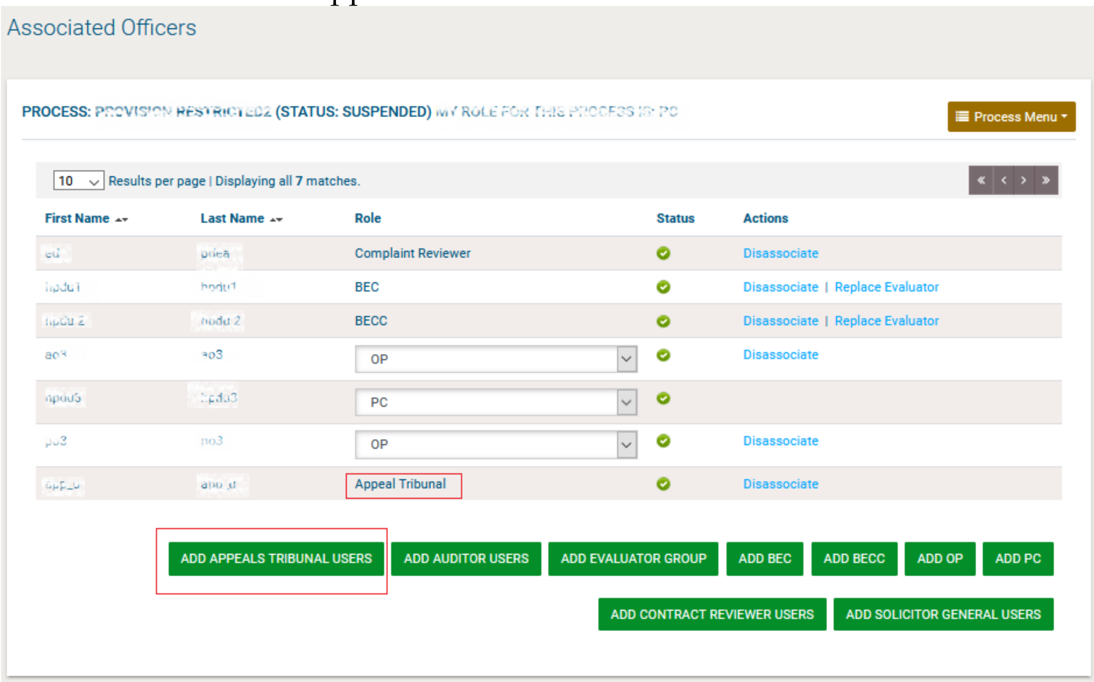


Figure 178: Associated Appeal Tribunal user

The user that has been associated as the Appeal Tribunal user will have to upload and send his administrative review response.

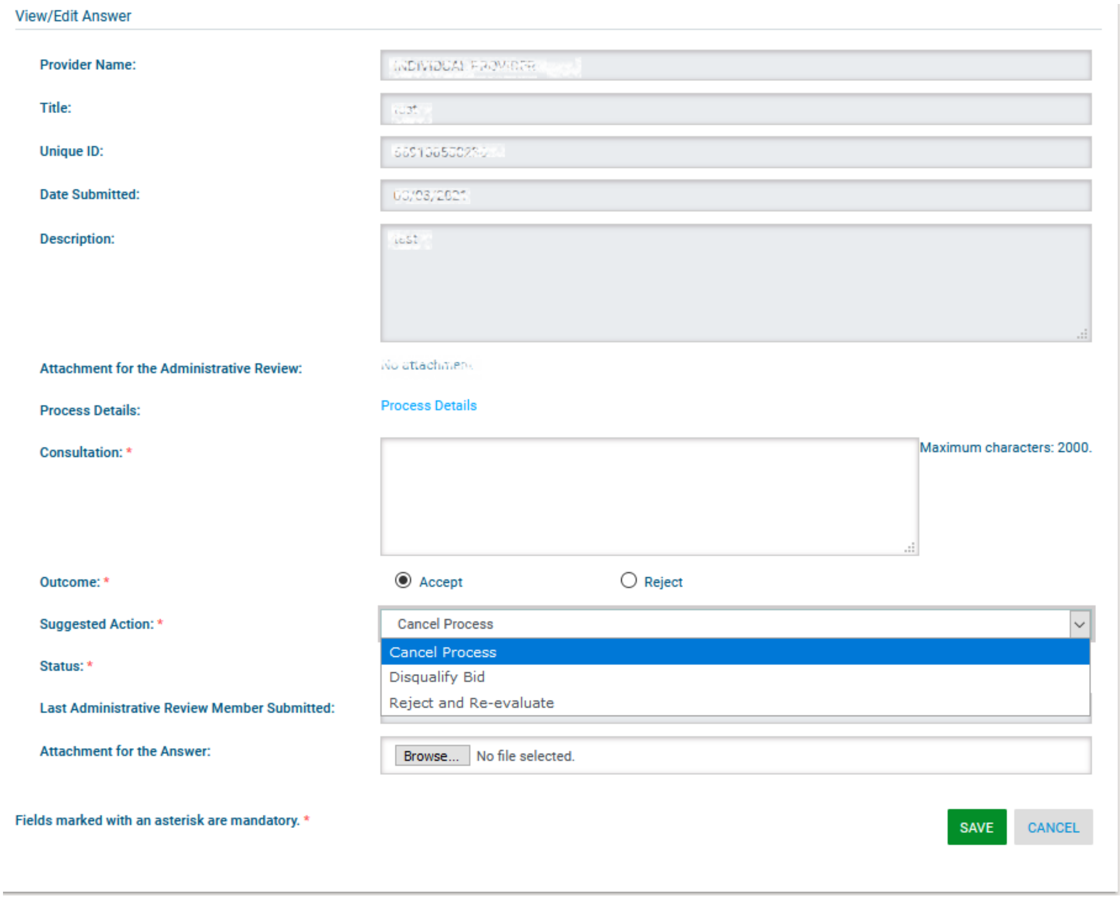


Figure 179: Submit Administrative Review

After the Appeal Tribunal user save as official his response the PC user will have a new task, the “Act on Administrative Review Outcome” and will be displayed in his homepage task list.

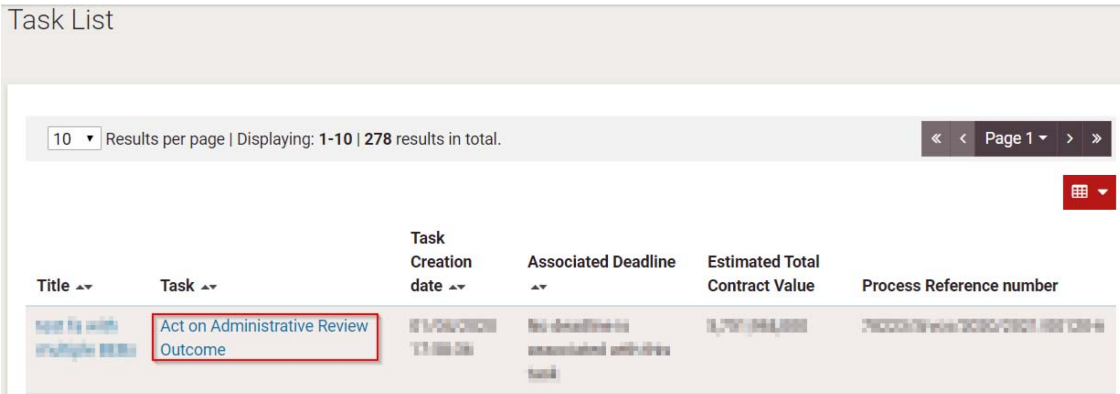


Figure 180: PC's task list – Act on Administrative Review Outcome

Upon clicking on the aforementioned task, the "Administrative Review Management" page is displayed and the PC user will have to proceed based on the Administrative Review.

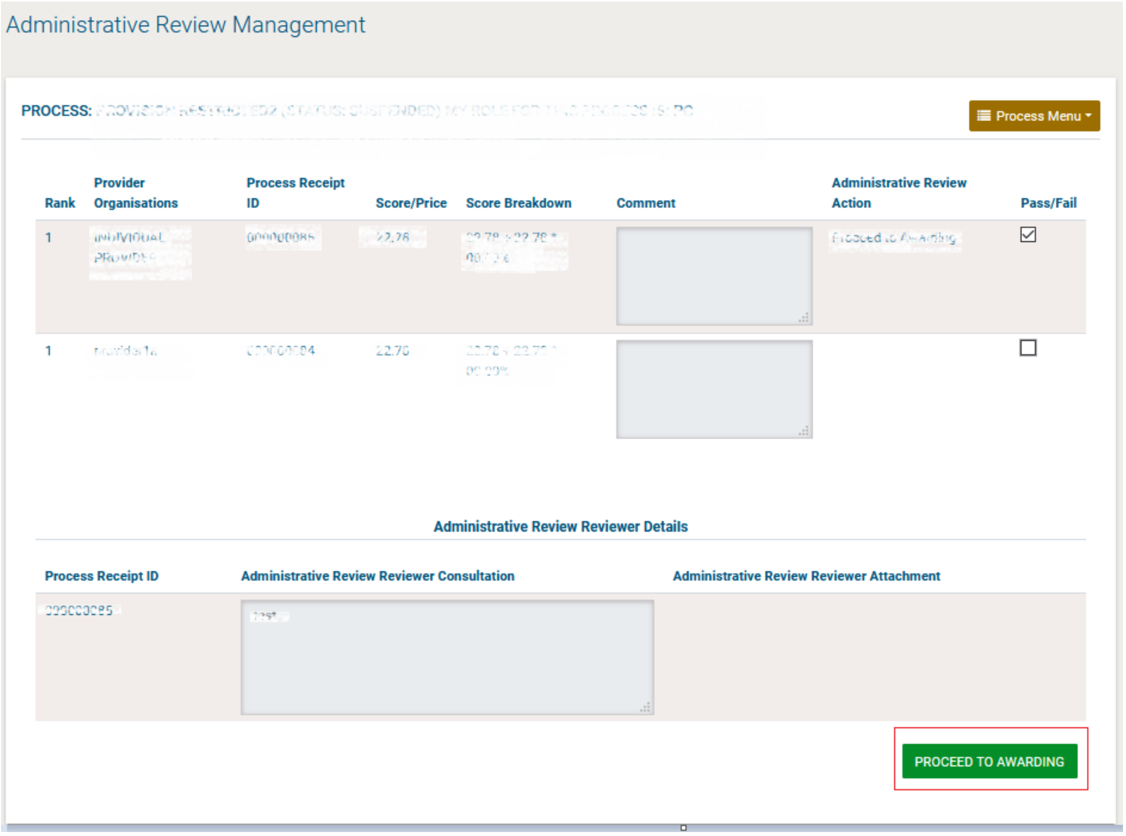


Figure 181: Manage Administrative Review

3.12 E-Auctions Functionality

3.12.1 Creation of an e-Auction event

In order for the user to create an e-Auction event, the type of event must be defined. The system supports the three following types of events:

- Round based
- Time based
- Combination

In order for the user to create a Round based event, the following information must be provided (Figure 182):

- o Number of Rounds
- o Duration of Round
- o Interval Between Rounds
- o Minimum bid Difference
- o e-Auction Currency
- o Lot Reference

After providing all necessary information, the user selects the button "Save" to continue with the following steps required during the configuration of an e-Auction event.

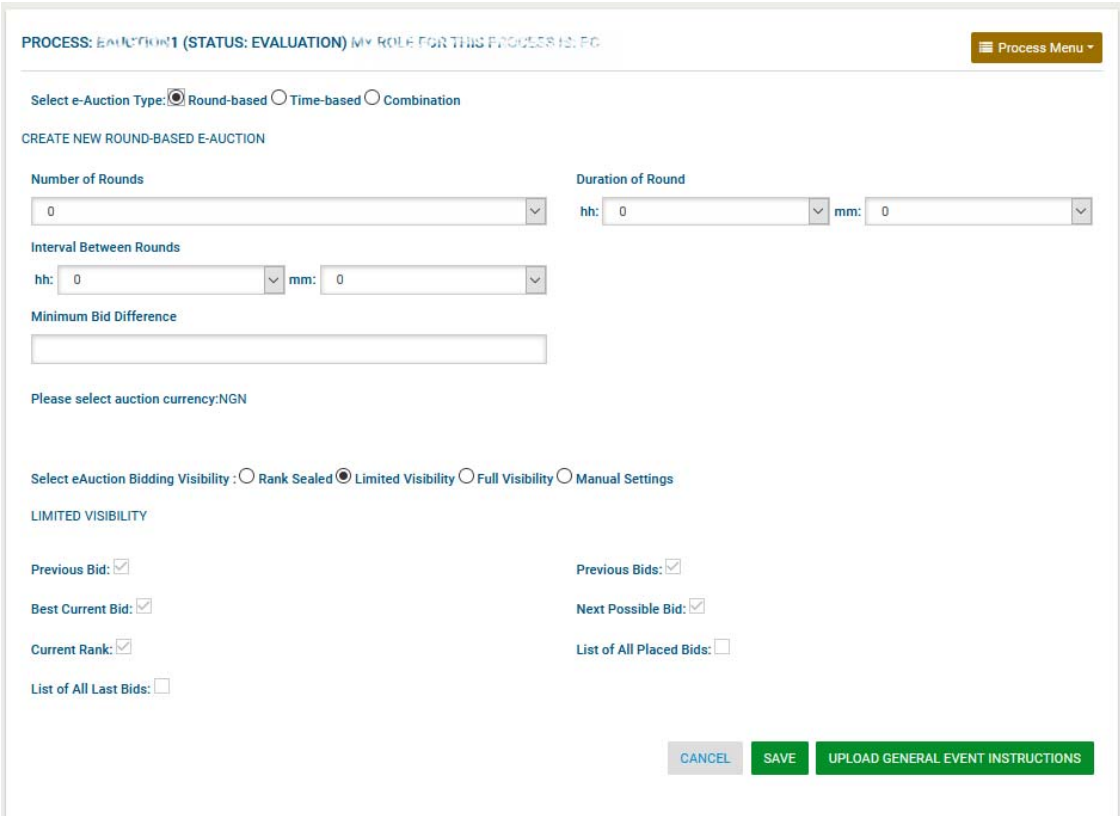


Figure 182: Round based event

In order for the user to create a Time based event, the following information must be provided (Figure 183):
Duration of e-Auction event
Enable Automated Extensions
Duration of Extension
Time before of the e-Auction when extension is possible
Maximum number of automated extensions
Accept multiple winners
Minimum bid Difference
E-Auction Currency

After providing all necessary information, the user selects the button "Save" to continue with the following steps required during the configuration of an e-Auction event.

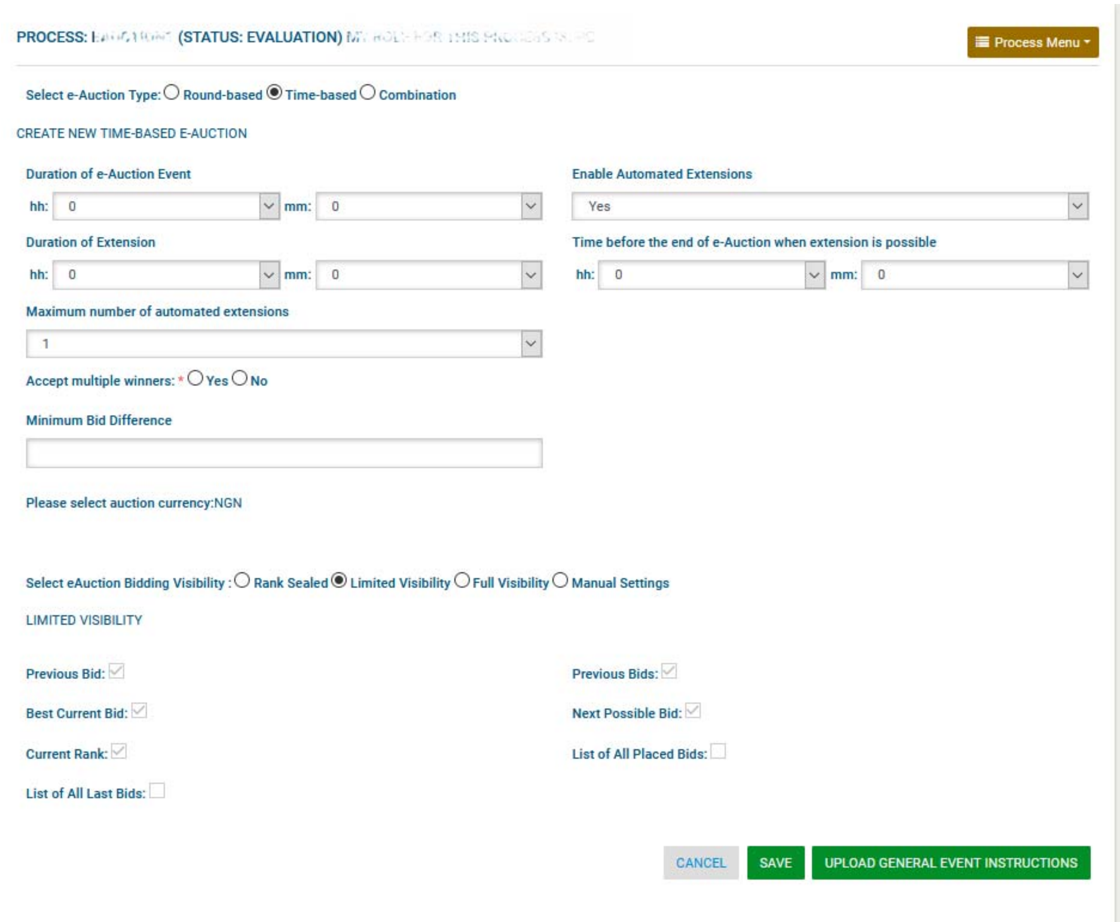


Figure 183: Time based event

In order for the user to create an event based on the Combination of time and rounds, the following information must be provided (Figure 184):

Number of Rounds
Duration of Round
Interval Between Rounds
Enable Automated Extensions
Duration of Extension
Time before the of e-Auction when extension is possible
Maximum number of automated extensions

Minimum bid Difference
E-Auction Currency
Lot Reference

After providing all necessary information, the user selects the button "Save" to continue with the following steps required during the configuration of an e-Auction event.

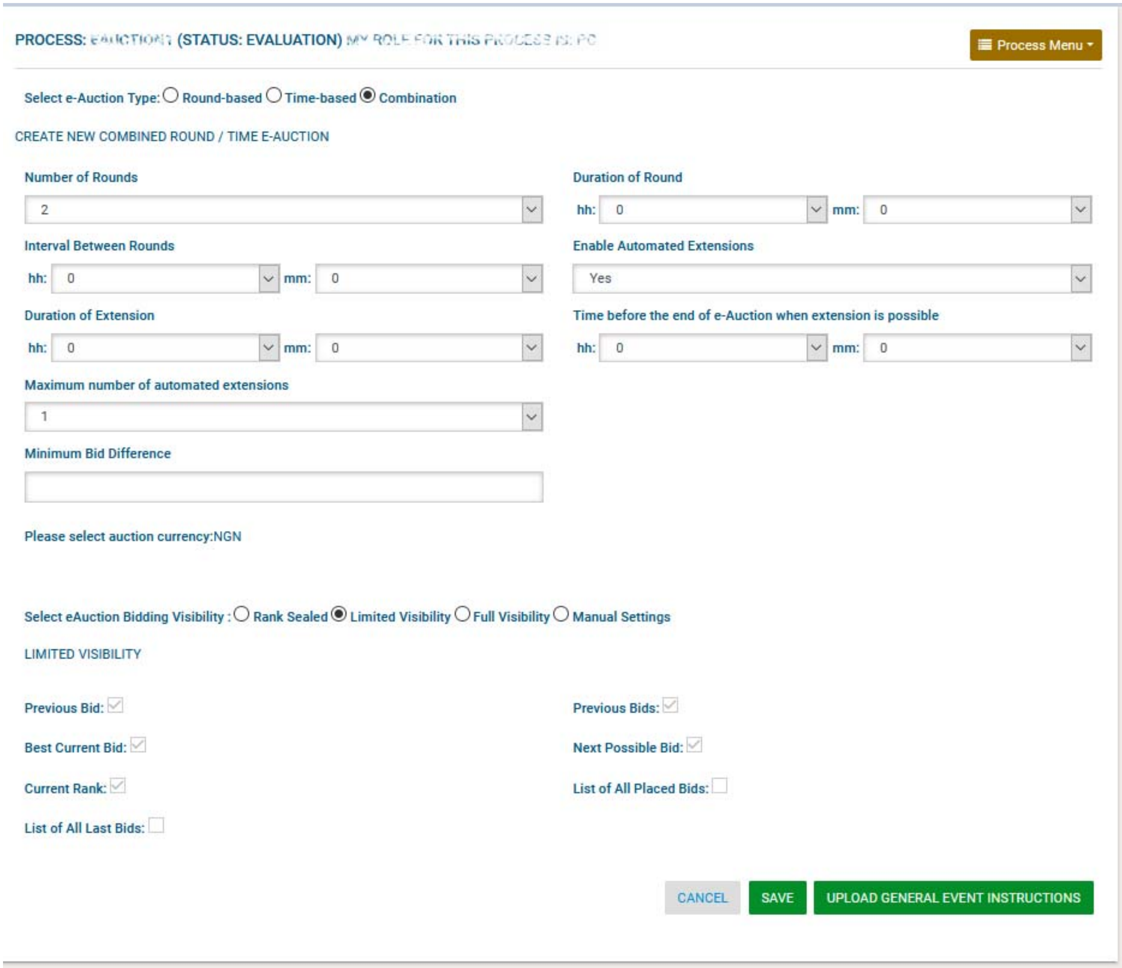


Figure 184: Combination event

PC user will have the option to select the auction bidding visibility (Rank Sealed, Limited Visibility, Full Visibility and Manual Settings).
In case "Manual settings" is selected, the following options (access rights) are given to the participants:
Previous bid : bidder's previous bid,
Previous bids: bidder's all previous bids,
Best current bid: best bid out of all provider bids
Next possible bid: next possible bid out of all provider bids
Current rank: bidder's relative ranking
List of all placed bids: all bids placed by all providers
List of all latest bids: latest bids placed by each provider.

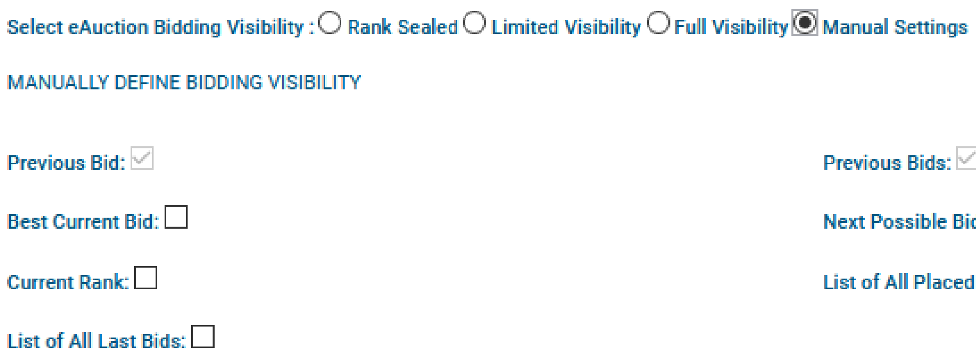


Figure 185: Manual Definition of Visibility settings

Selecting the button "Upload general event instructions" allows the user to upload general instructions and specifications regarding the event. In the popup window shown below, the user selects the file of his choice (by using the provided file browsing functionality) and then "Upload", to upload the file in the system (Figure 186). Finally, the user selects the button "Close" to close the popup window.

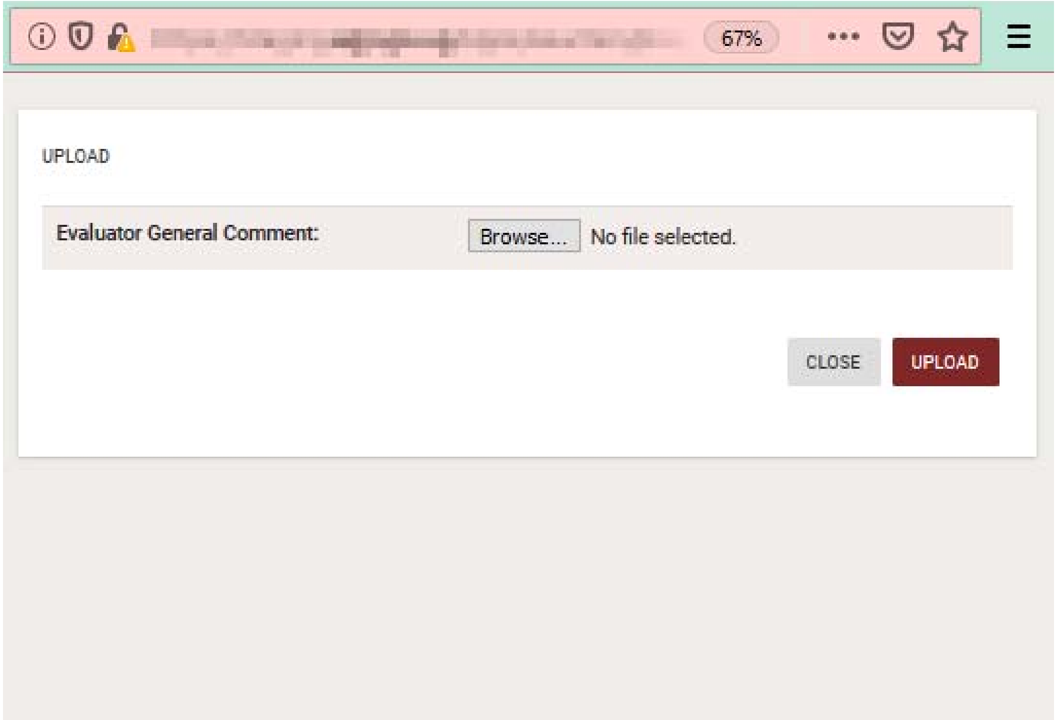


Figure 186: Upload general instructions

3.12.2 Scheduling the e-Auction

The user can edit the option of the event by selecting the "Edit e-Auction" button. Furthermore, the user can schedule the time and date for the e-Auction event, by selecting the button "Schedule e-Auction" (Figure 187).

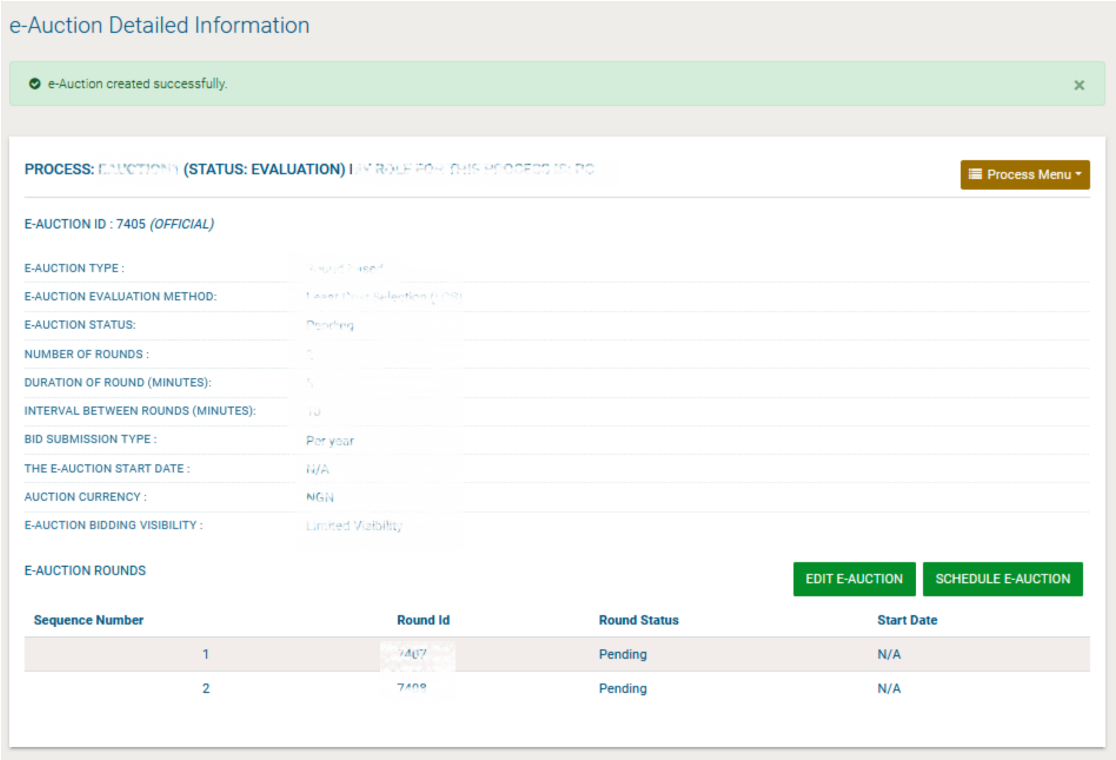


Figure 187: Scheduling e-Auction

The PC user has to populate the following information in order to invite the qualified providers (Figure 188):

- E-Auction start date
- E-Auction time
- Body
- Attachment

The participants (bidders) have to accept/decline the invitation to participate in the e-Auction event before the scheduled date and time of the event.

Selecting the button "Schedule" saves the user's choices and schedules the e-Auction event.

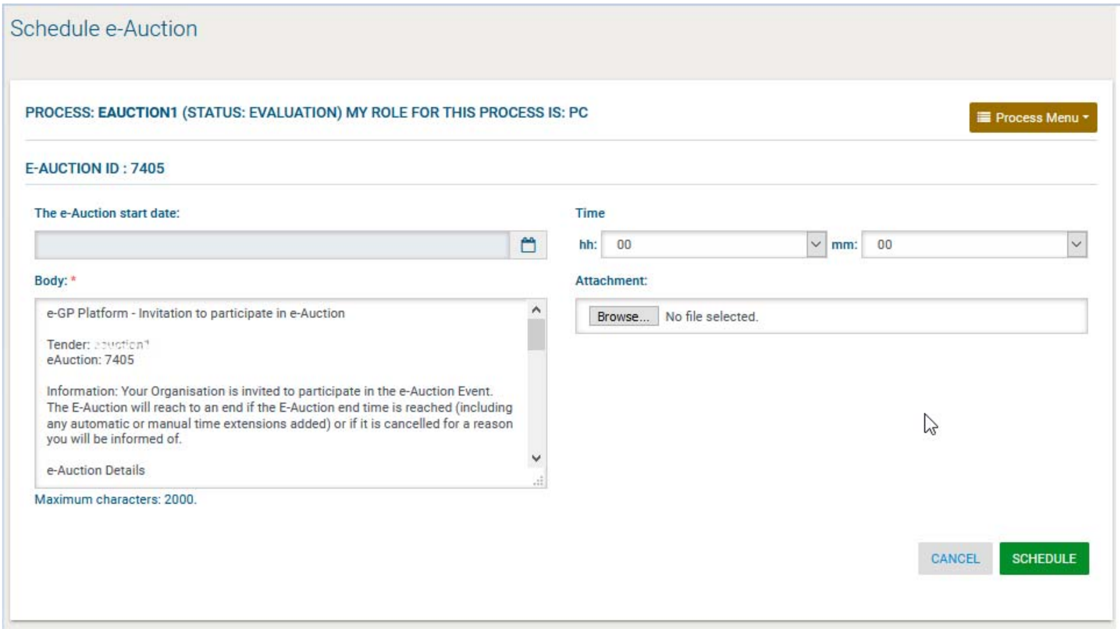


Figure 188: Scheduling e-Auction

3.12.3 List of e-Auction events

In order to list the established e-Auction events, the user should select the option "e-Auctions" from the Process Menu (Figure 189).

Figure 189: List of e-Auctions events

The list contains all e-Auction events (active and past) (Figure 190). The "e-Auction Id" functionality enables to preview the e-Auction parameters. Furthermore, the user can select the link "Attend e-Auction" to attend an active e-Auction event.

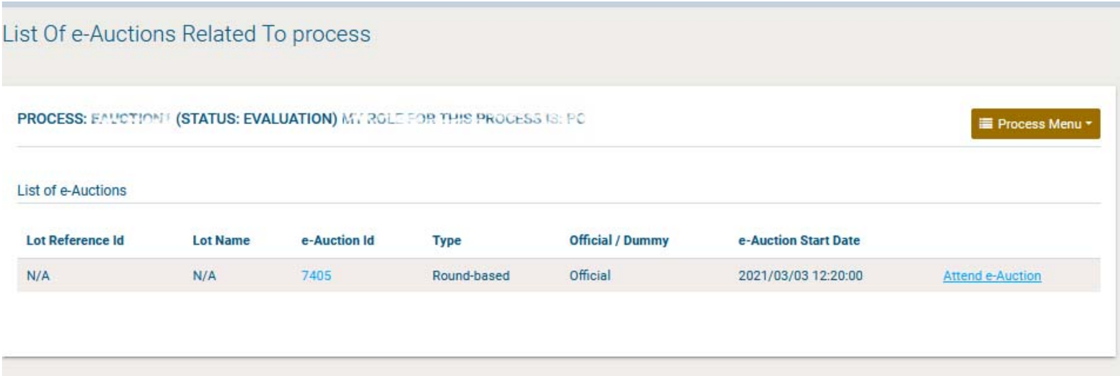


Figure 190: e-Auctions Id

3.12.4 Preview of an active e-Auction event

In order to preview an active e-Auction event, the user should select the link in the column "e-Auction ID".

The system displays all relevant information regarding the event. Furthermore, the following functionality is enabled (Figure 191):

- Creation of a practice e-Auction event
- Re-schedule the e-Auction event
- Cancel the e-Auction event
- Attend the e-Auction event

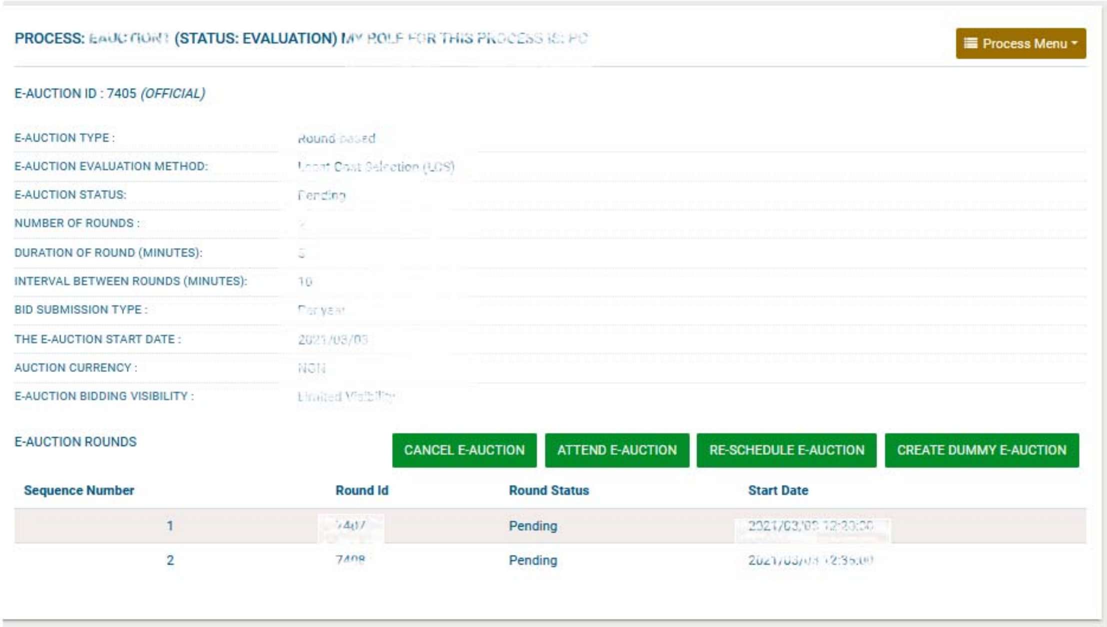


Figure 191: Relevant information

3.12.5 Creation of a practice e-Auction event (Prior to the actual event)

In order to create a practice e-Auction event the user should select the button "Create Dummy e-Auction" (Figure 191). A dummy e-Auction will include all Bidders who have been invited to the formal e-Auction event. The practice event will be held at a different time and date from the formal event. After the end of the practice event, all bidding data will automatically deleted.

3.12.6 Reschedule an e-Auction event (enabled only prior to the actual e-Auction event)

In order to reschedule an event, the user selects a new date and time for the event and provides a message which will be sent to all participating Bidders. The user can also attach a file to the invitation. Selecting the button "Reschedule e-Auction" will modify the e-Auction start date and time (Figure 192). All associated Bidders will be notified accordingly.

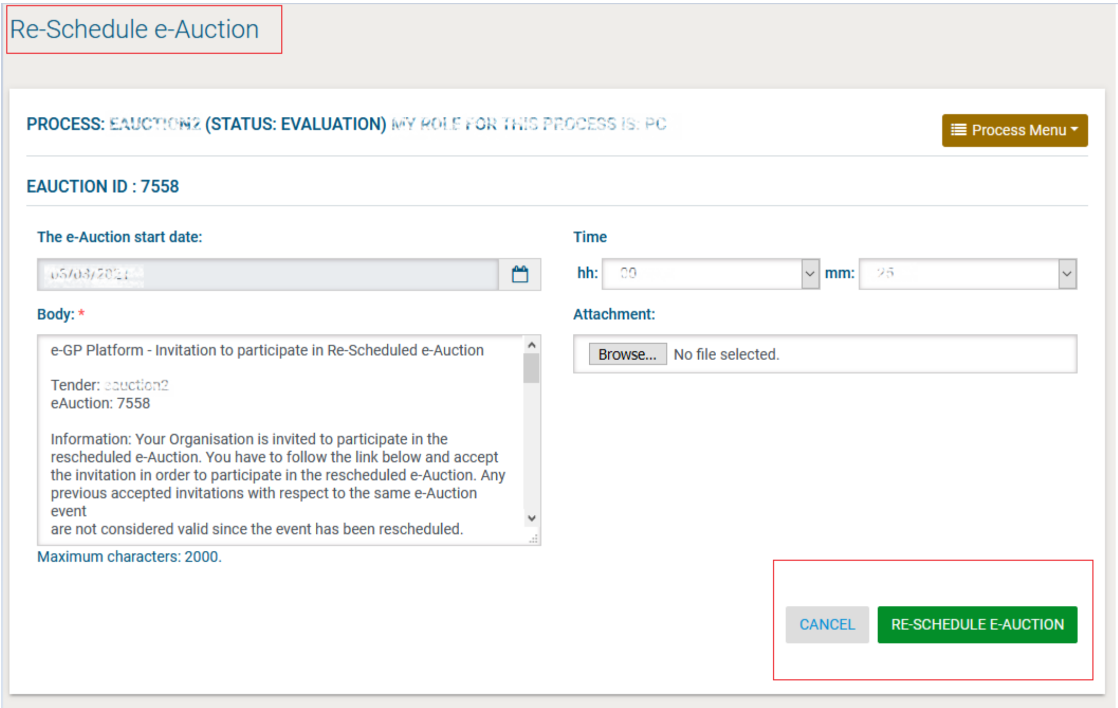


Figure 192: Re-schedule an e-Auction

3.12.7 Cancel of an e-Auction event

In order to cancel an e-Auction event, the user should provide a justification and select the button “Cancel e-Auction”. All associated users who are involved with the specific e-Auction will be notified (Figure 193).

Figure 193: Cancel an e-Auction event

3.12.8 Attend the e-Auction event

In order to attend the e-Auction event the user should select "Attend e-Auction" button in (Figure 191).

At the next page, the user previews, in real time, the status of the e-Auction (Figure 196). The system displays the code of the e-Auction event, the type of the event, the time left to the end of the round, the currency of the event, the uploaded general instructions, the current best bid and the current ranking of the bidders.

Figure 194: Attend an e-Auction event is real time (1)

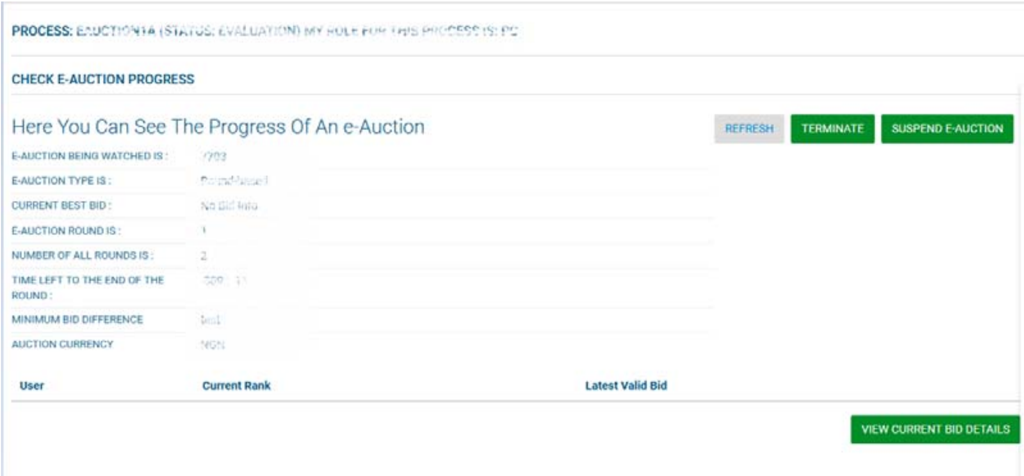


Figure 195: Attend an e-Auction event is real time (2)

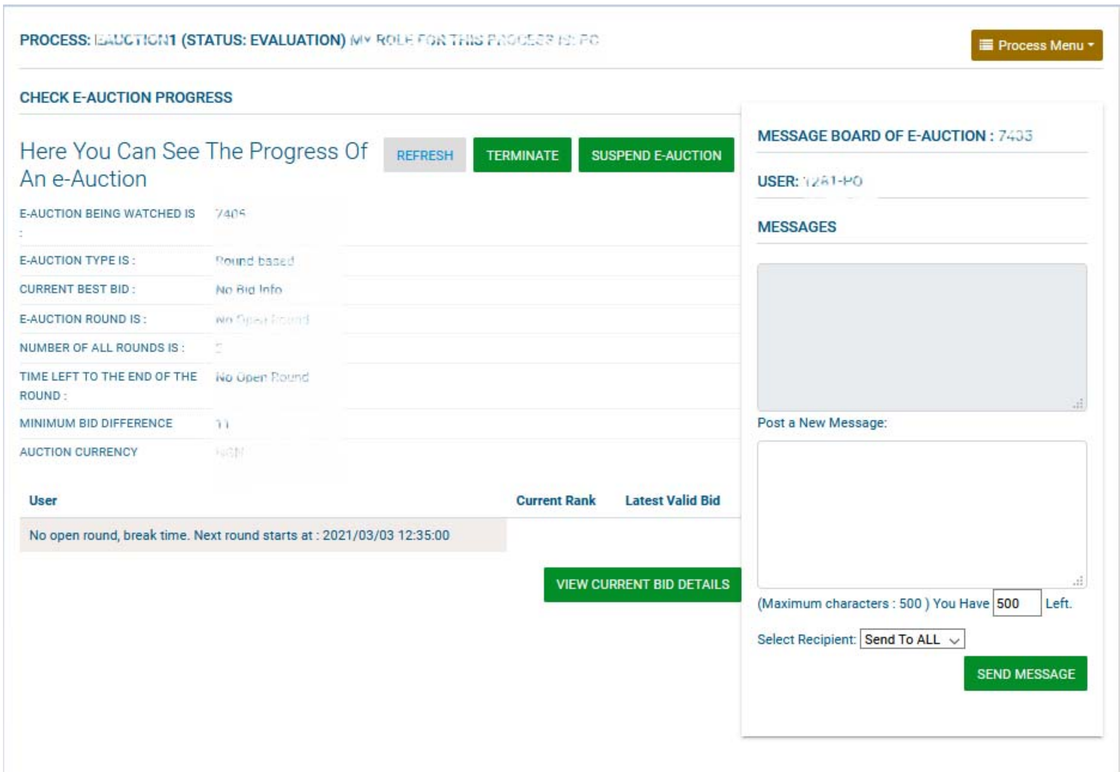


Figure 196: Attend an e-Auction event is real time (3)

The user can suspend the e-Auction event by selecting the "Suspend e-Auction" button (see 3.12.9). The button "Refresh" updates the page. Finally, the user can select the button "View Current Bid Details" to view the details of the current bid.

3.12.9 Suspend an e-Auction event

In order to suspend an e-Auction event the user should provide the justification and the duration of the suspension. Then, the user should select the "Suspend e-Auction" button (Figure 197).

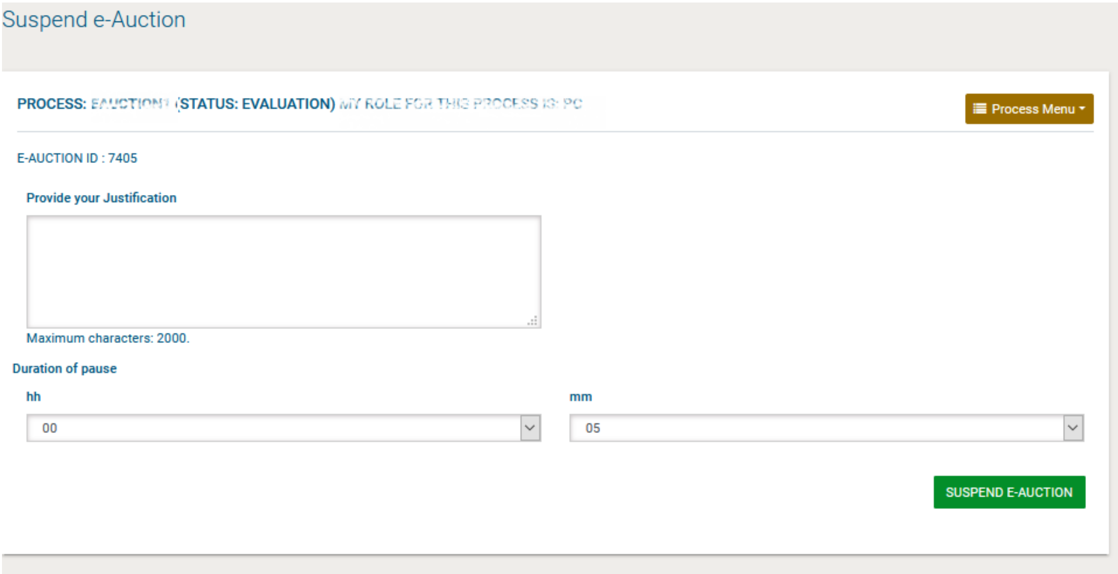


Figure 197: Suspend an e-Auction event

The system will notify all participating users who are associated with the specific process, when the suspension of an event is envisaged and communicate the suspension duration specified (Figure 198). No further bidding is allowed during the suspension period.

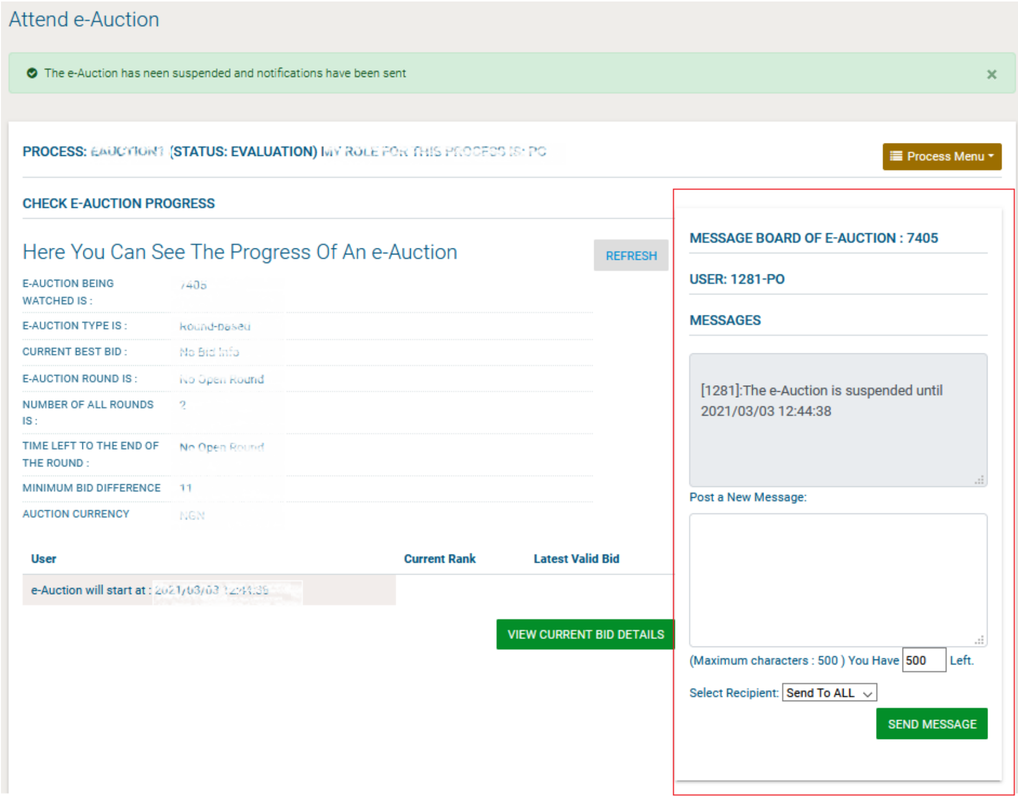


Figure 198: Details of a suspended e-Auction event

3.12.10 e-Auction Message board

The message board provides functionality for the live communication between participating users. The top panel of the board displays all messages between users (Figure 199). The bottom part of the board is used for posting new messages.

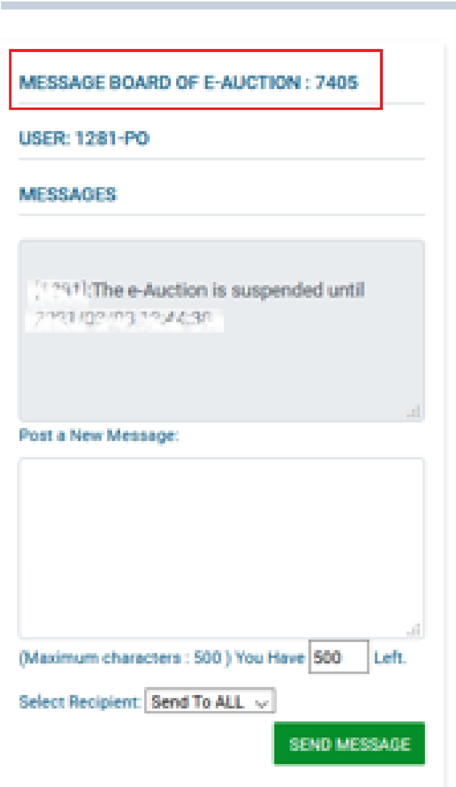


Figure 199: Message board

After writing a message, the user selects the recipients of the message. The user can send the message to all associated or to a selected user. Finally, selecting the button "Send message" sends the message to the selected recipients.

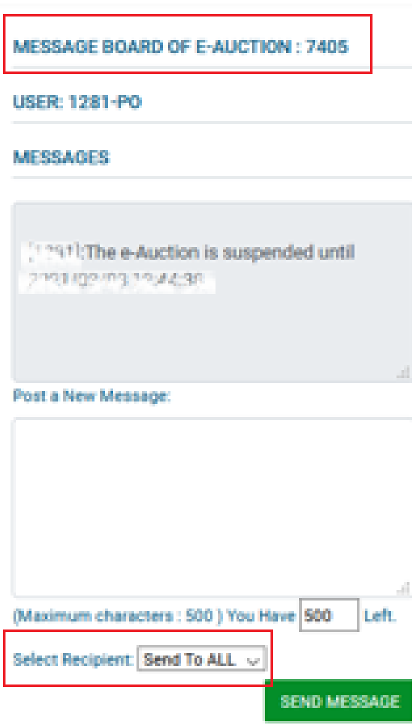


Figure 200: Selection of recipients

3.12.11 Preview of a completed e-Auction

When an e-Auction event is completed, the user selects the button "View Procurement Officer Report", in order to preview the results of the event (Figure 201). The user can also generate a copy of the Report by selecting the button "Export PDF".

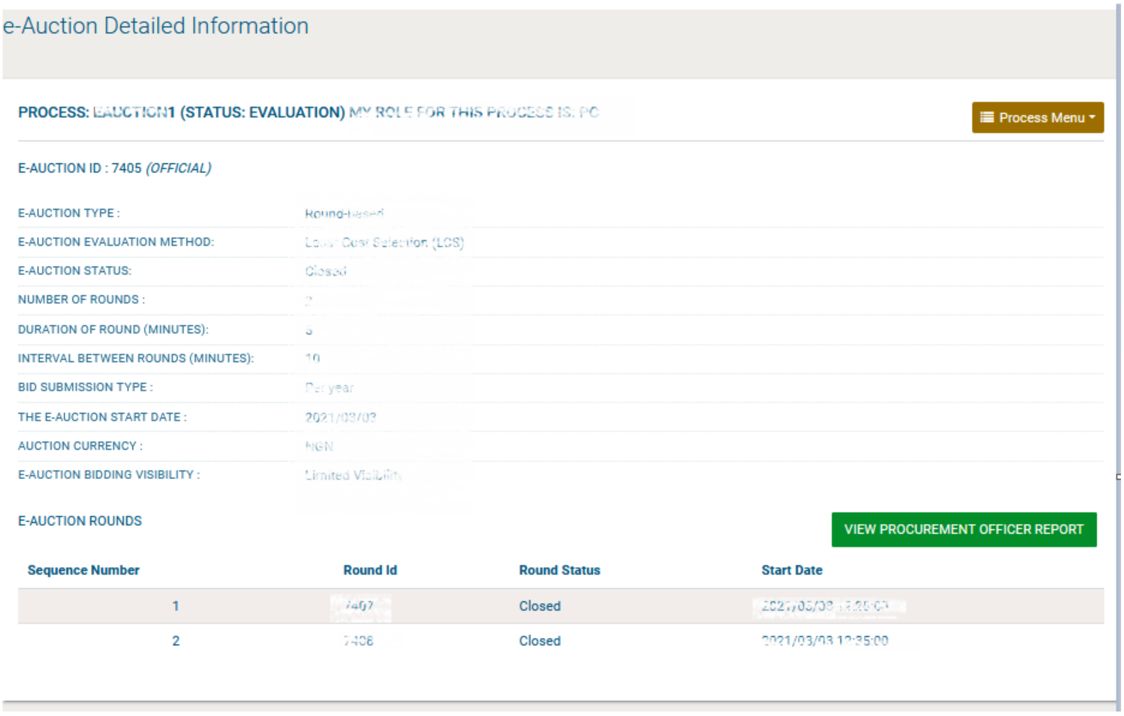


Figure 201: Completed e-Auction Report

The system displays to the user some detailed information regarding the bidding process (Figure 203):

- Bidders ID.
- Number of Bids per round.
- Details of the bids of each Bidder (value, ranking after bid).
- Final ranking of each Bidder.

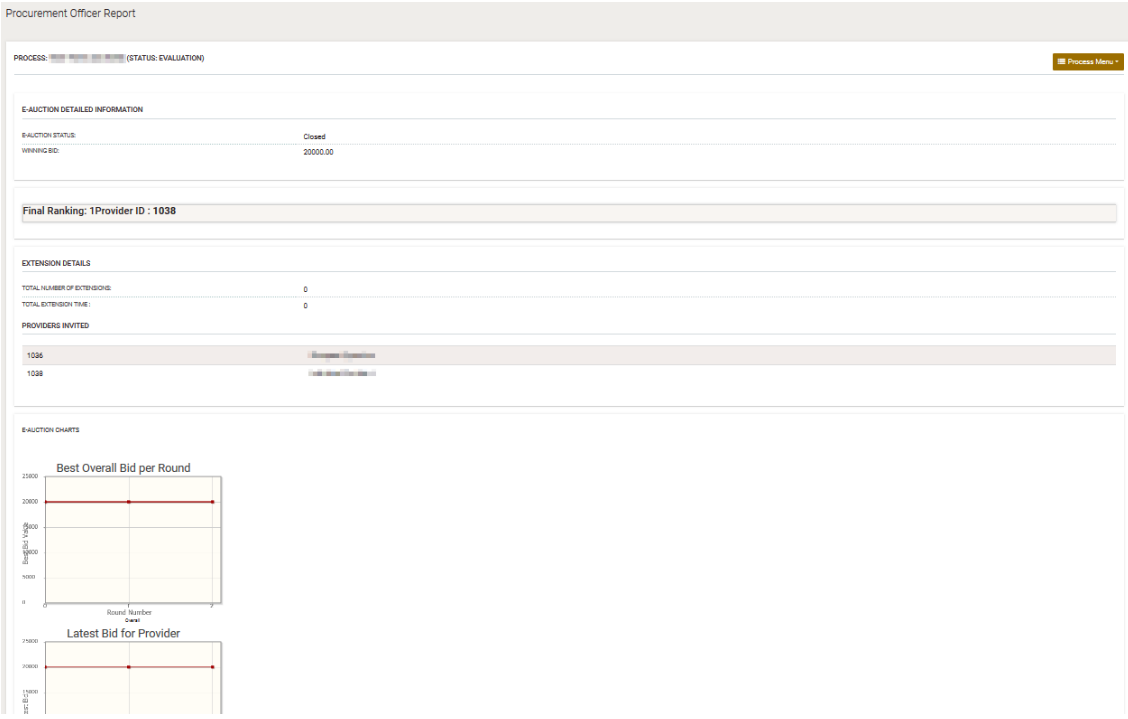


Figure 202: Details of the e-Auction event (1)

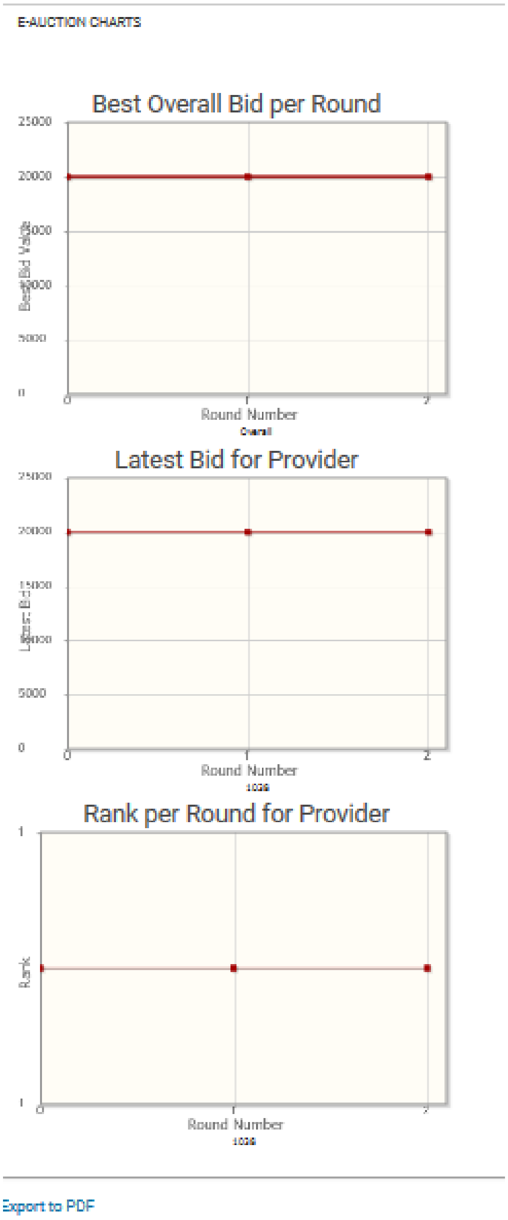


Figure 203: Details of the e-Auction event (2)

Furthermore, the following graphs describing the bidding process are also provided:

- Best overall bid.
- Latest bid per Bidder.
- Rank for each Bidder.

3.13 Final Ranking

After the announcement of the results the BECC user needs to confirm the qualification and ranking of providers. This is the last opportunity to reject the evaluation process and revert the process back to the opening and request re-evaluation.

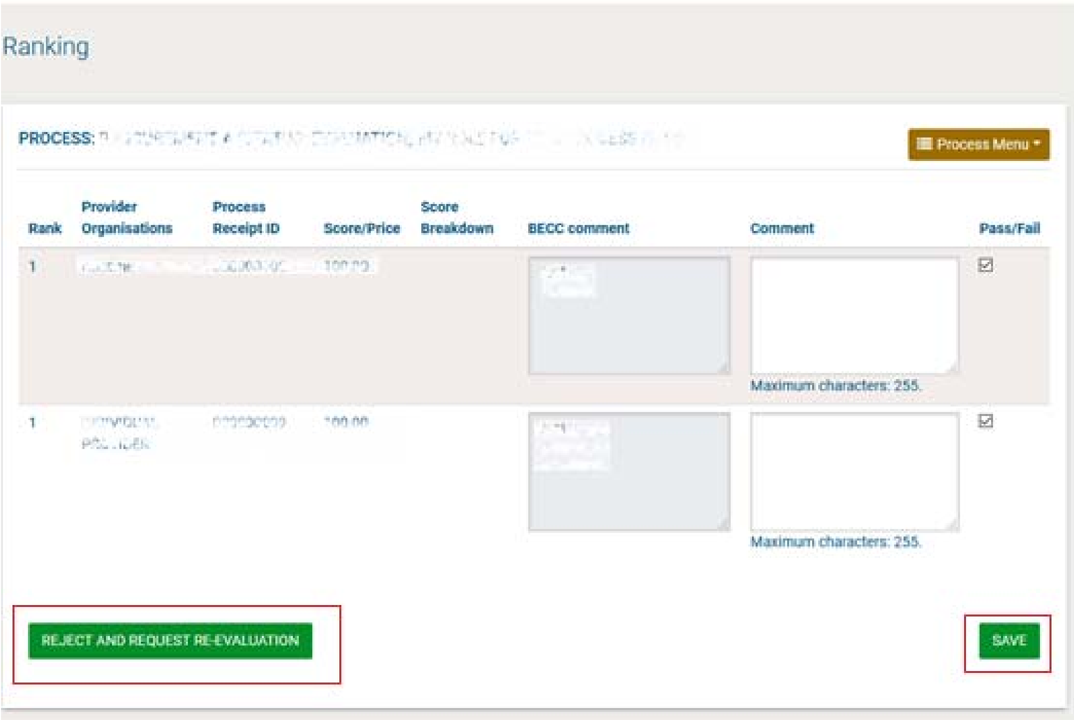


Figure 204: Confirm post-standstill ranking

3.13.1 Offline Evaluation Results

When the process is configured for offline evaluation, the evaluation process takes place outside of the system and only the final evaluation results are captured into the system. The evaluator provides the price or the score for each bid received and indicates whether the bid is approved or rejected. The evaluation report should be attached to maintain the audit information in the system. Once all results are captured, the evaluation can be saved as final.

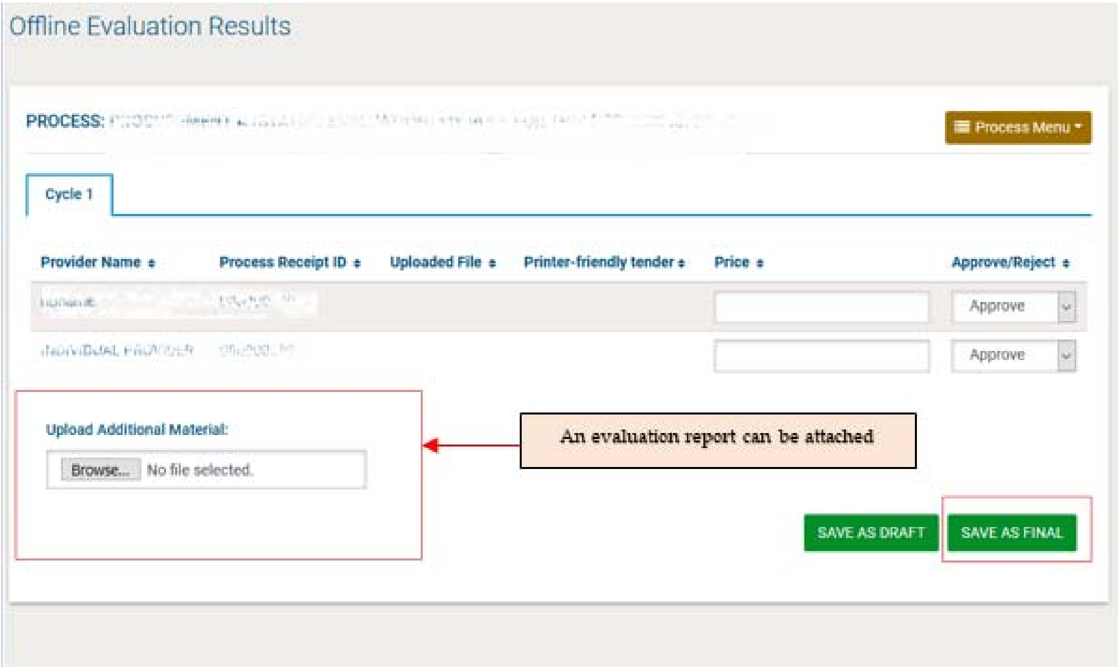


Figure 205: Provide offline evaluation results

The user then provides the providers' comments and rankings before proceeding to the announcement of results.

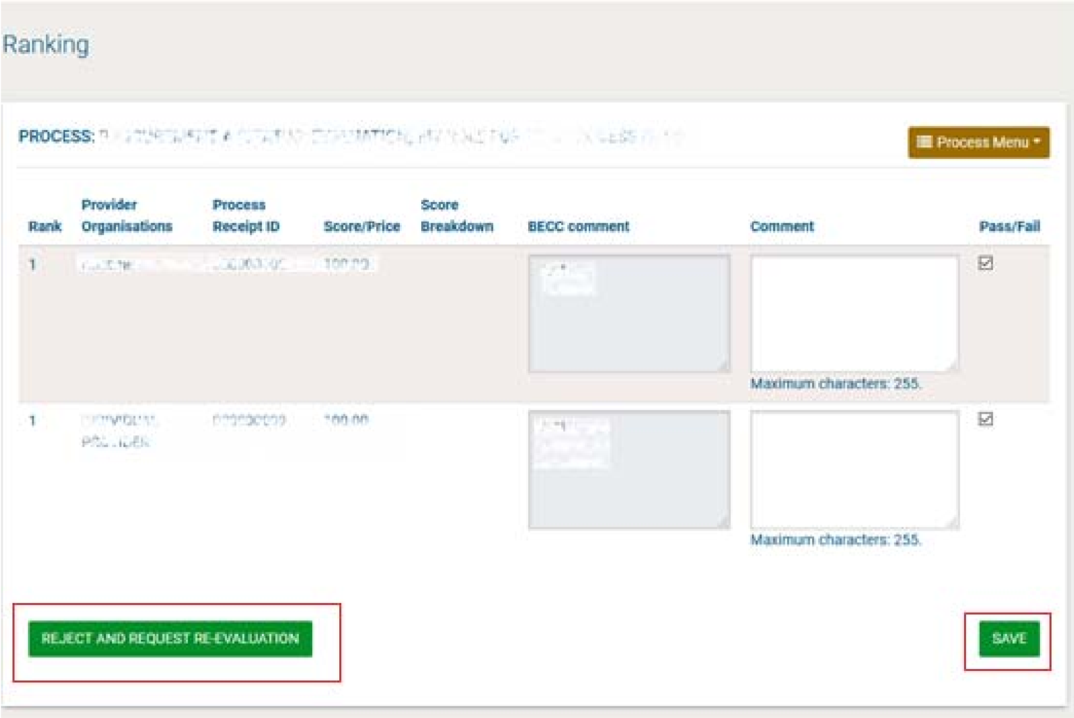


Figure 206: Offline provider ranking comments

3.14 Framework Agreements (FAs)

3.14.1 Establishing an FA

In case the process includes an FA, once the Standstill Period Ranking results are announced, the PC user will be tasked to conclude the Framework Agreement.

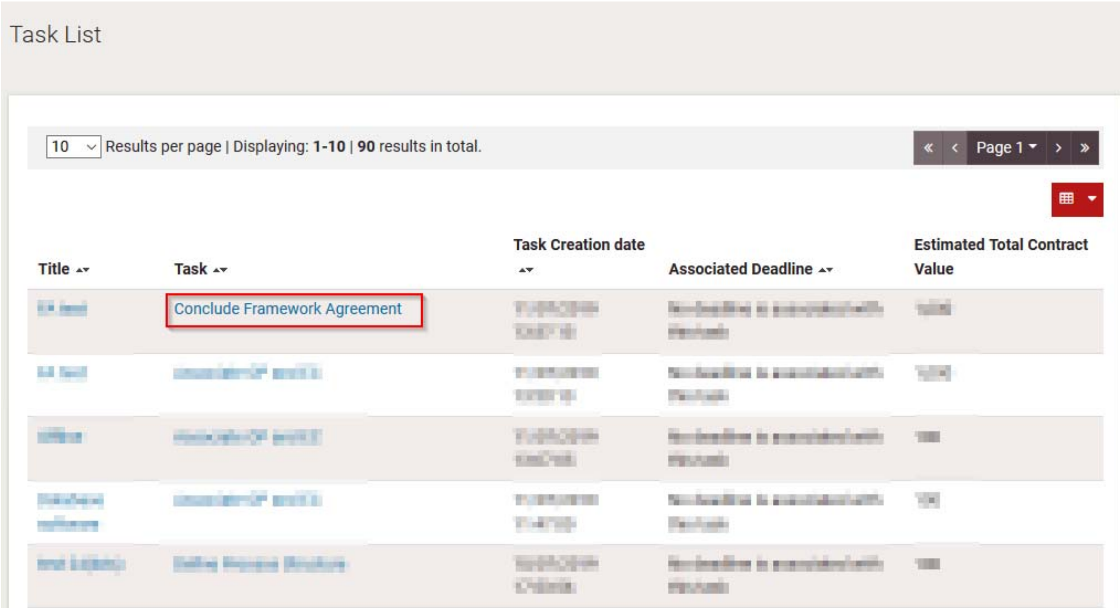


Figure 207: Task "Conclude Framework Agreement"

The PC selects the task and is redirected to the "Establish framework agreement" page, where the start/end date of the FA can be defined, along with the PDEs associated within the specific FA. After the "Start Date" is reached, the status of the FA will be updated from "Evaluation" to "Established". After, the establishment of the Framework Agreement, a notification email is sent to the Organisations, in order to know that they have been invited to participate in the established Framework Agreement.

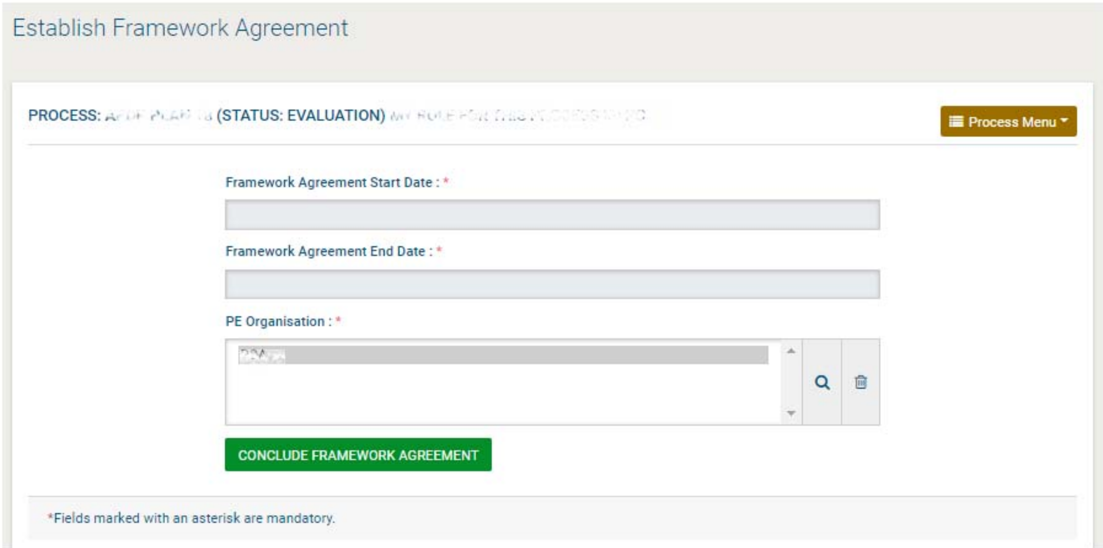


Figure 208: Establish FA page

3.14.2 Create a mini- process

After a Framework Agreement is established, HPDU users from the PDEs included in the FA, can visit an FA workspace by selecting the FA title under the "List of my Framework Agreements" page.

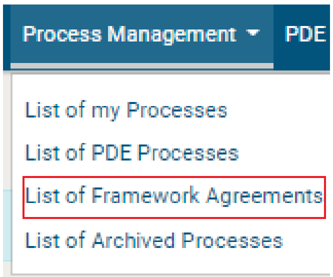


Figure 209: List of FAs option

After selecting the FA title from the list, the user can select the "Mini-Processes" option from the process menu to access the mini-processes page.

Figure 210: Mini-process option

The user can view the list of existing mini-processes and create a new online or a manual one by selecting the respective option.

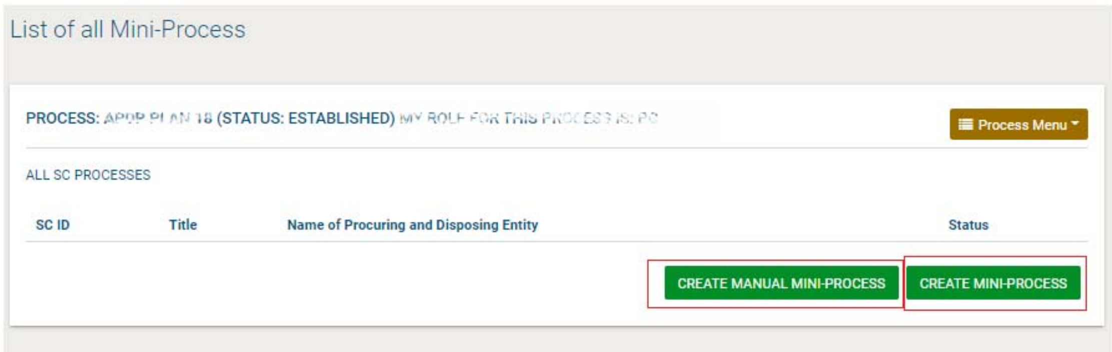


Figure 211: Mini-Processes page

Upon setup of the Mini-process workspace the PC selects the number of providers that can participate in the mini-process from the pool of total providers eligible within the FA. Upon the provider invitation stage, the providers to participate in the mini-process will be randomly selected, abiding to the number defined by the PC.

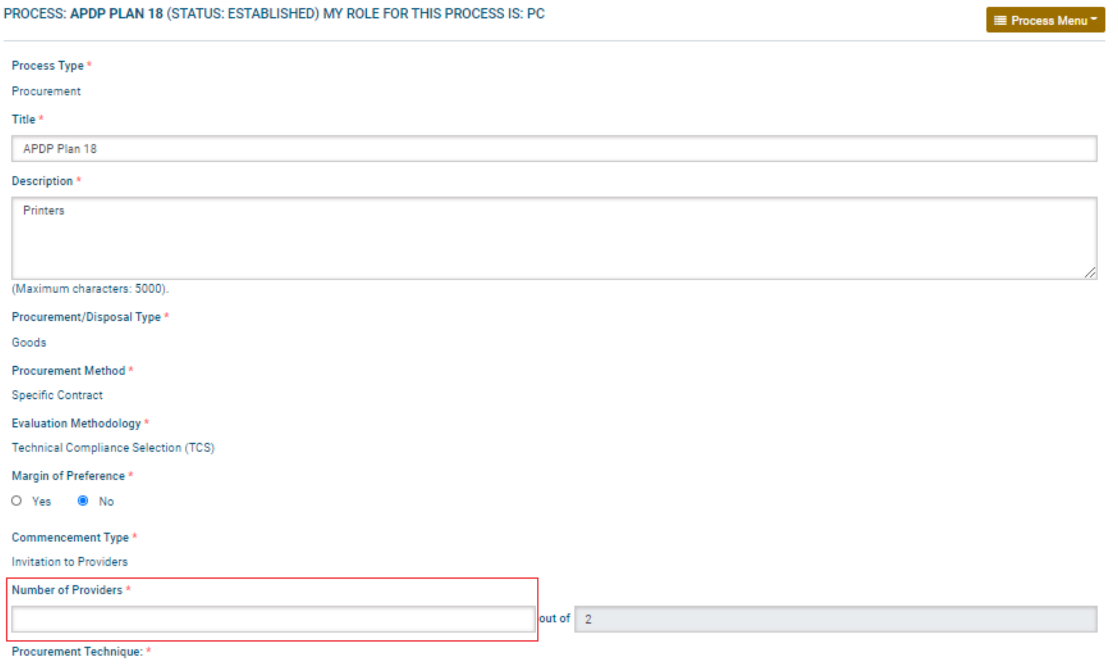


Figure 212: Mini- process workspace

3.15 Contract Awarding

3.15.1 Draft Contract(s)

After the successful approval of the Post Standstill period ranking, the PC user will be tasked to award the process to the qualified provider(s). This can be done either by selecting the "Award" button in the "View Procurement details" page or by selecting the "Contract Award" task from the task list in the user's homepage. This selection will lead the user to the 'Award' page

Figure 213: Contract Manager's Award Contracts Task

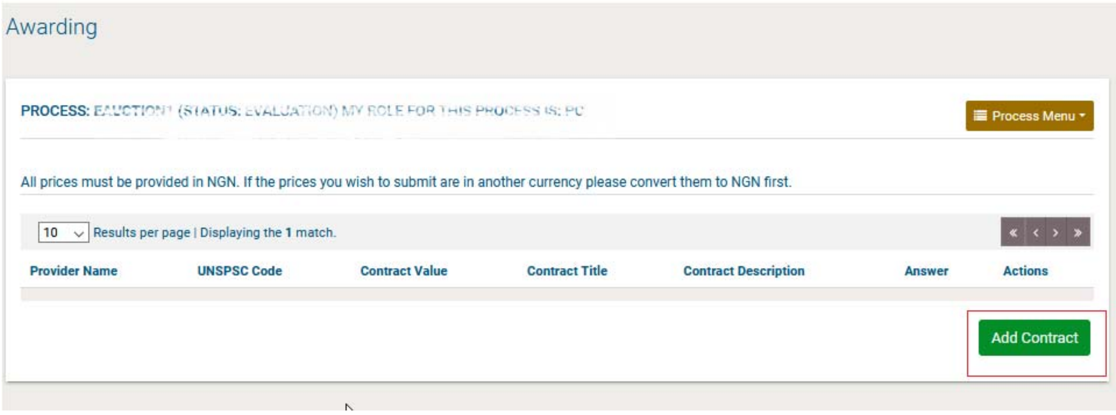


Figure 214: Process contracts page

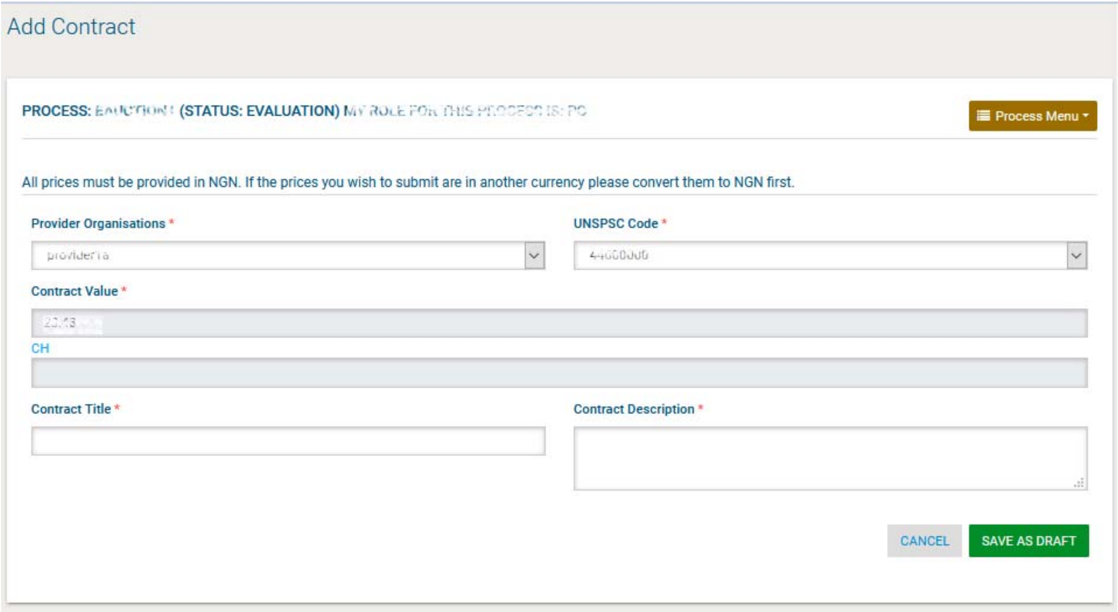


Figure 215: Awarding page

3.15.2 Contract Document

At this point in time, a "Draft" contract workspace is created in the Contract Management module.

3.15.3 Contract Approval

After the draft creation of the Contract, the Contract Manager will request for a Contract Reviewer, in order to provide his approval or rejection.

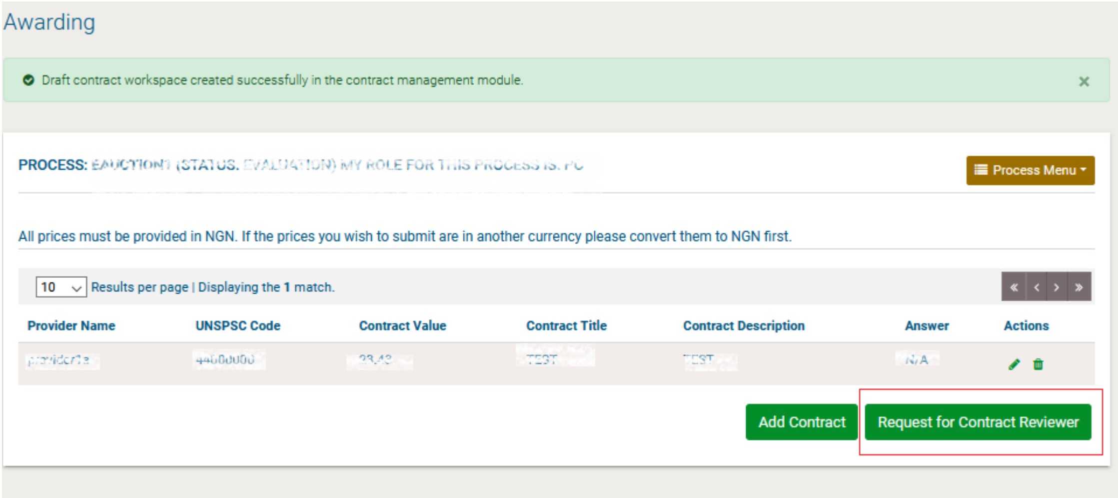


Figure 216: Request for Contract Reviewer

After the Contract Manager user request for Contract Reviewer, the PC user will be tasked to associate the "Contract Reviewer" process role. Only users from the LO users, of the PDE, will be displayed in the search results for the "Contract Reviewer".

Figure 217: Associate Contract Reviewer task

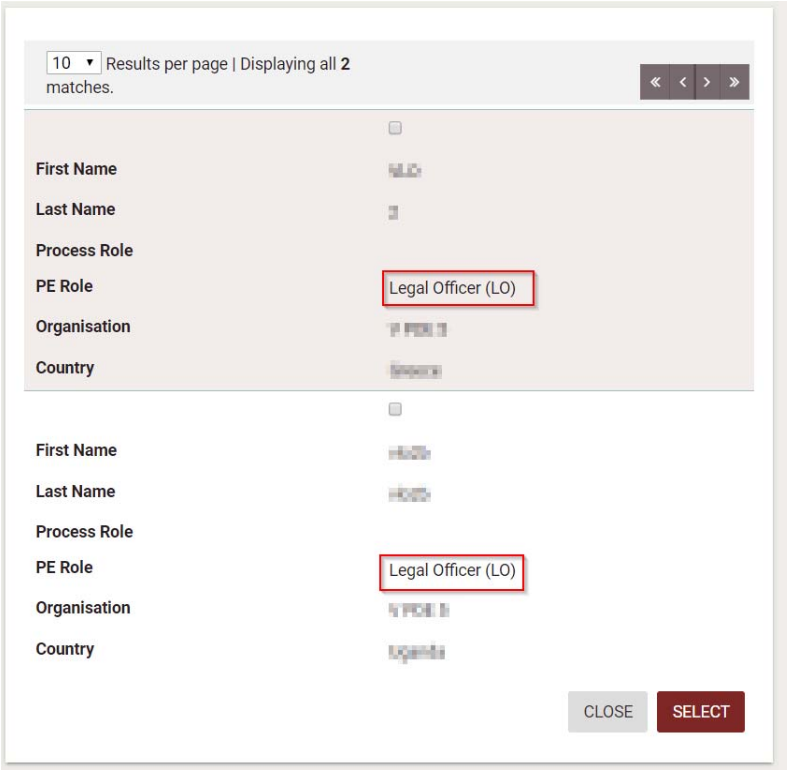


Figure 218: Search Results for the Association of the Contract Reviewer

Upon clicking on the relevant task available on his task list, the Contract Reviewer will be re-directed to the "Awarding" page, where he will be able to approve or reject, with a mandatory reason, the Contract.

Figure 219: Contract Reviewer's Review Contract task

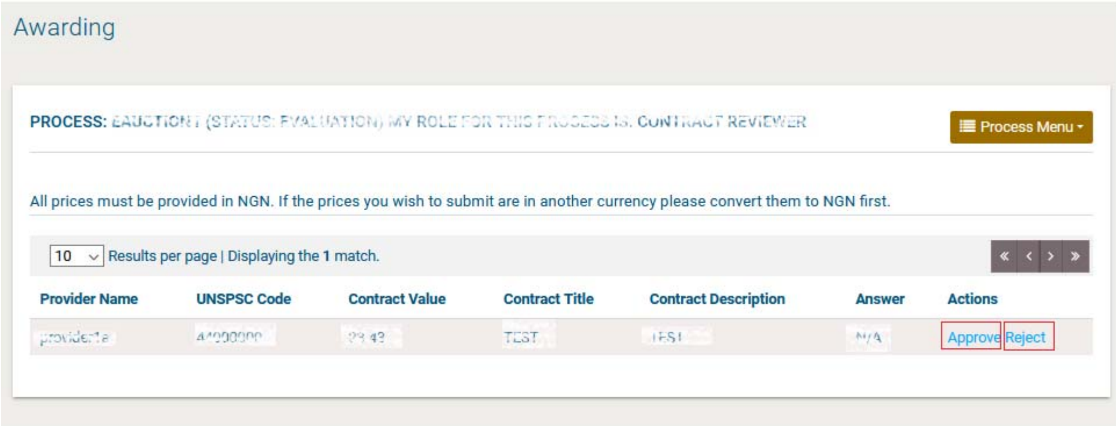


Figure 220: Approve/Reject Contract

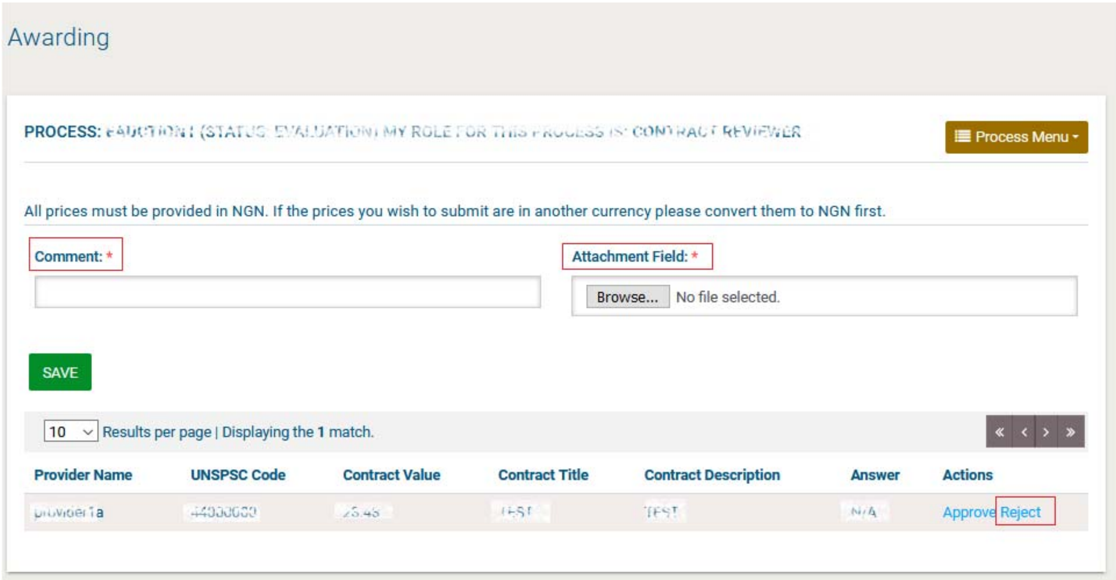


Figure 221: Reject Contract

In case the awarded value is greater than the specified Solicitor General threshold and the contract reviewer's decision is approval, the draft contract will automatically be sent to the associated Solicitor General user for review.

Upon clicking on the "Award" button, available on the "View Process Details" page, the solicitor general user will be re-directed to a page where s/he will be able to approve or reject the contract.

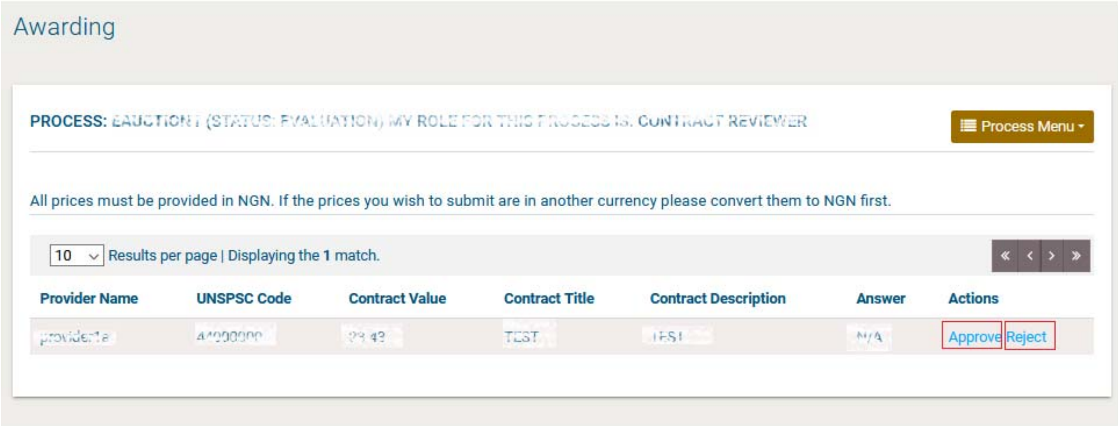


Figure 222: Approve/Reject Contract by Solicitor General

In case the Contract Reviewer or the Solicitor General select the Reject option, a notification that will contain the comments, as well as, the attachment of the reviewer will be dispatched to the Contract Manager.
The Contract Manager will be in position to edit the existing draft contract before submitting it for approval again.

In case the Contract is accepted by the Contract Reviewer or the Solicitor General, depending on the awarded value, the "Request Providers Acceptance" button will be available to the Contract Manager.

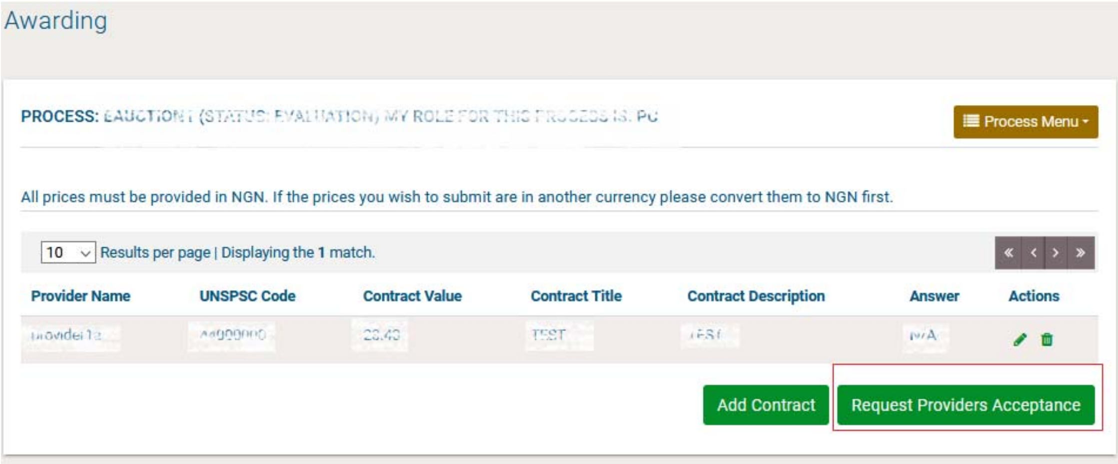


Figure 223: Request Providers Acceptance button

The document has been reviewed by the Awarded Provider and no further changes are required.

3.15.4 Finalise Contracts

When the physical contract document has been signed by the provider, the PC user needs to finalise the contract award(s) in the system.

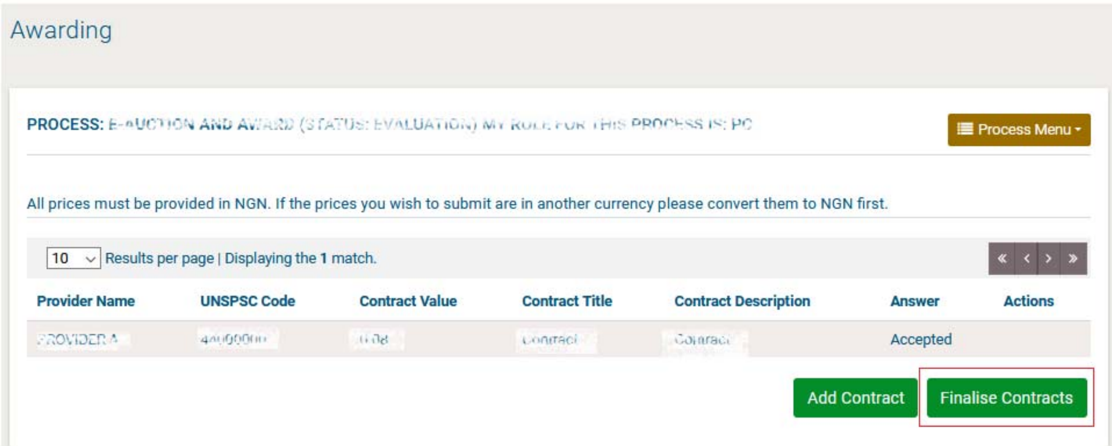


Figure 224: Finalise awarded contracts

3.15.5 Publication of Contract Award Notice

After the PC user finalise the contracts, the "Publish Contract Award Notice" task will be available at his task list.

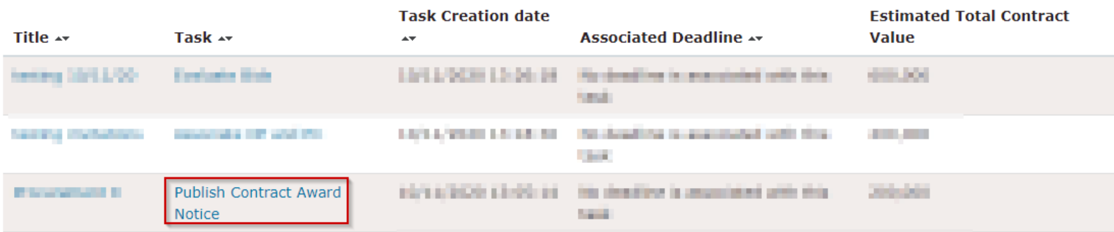


Figure 225: Publish Contract Award Notice task

Upon clicking on the aforementioned task, the "Notice and Process documents" page will be displayed, and the user will have to click on the "Create Notice" button.

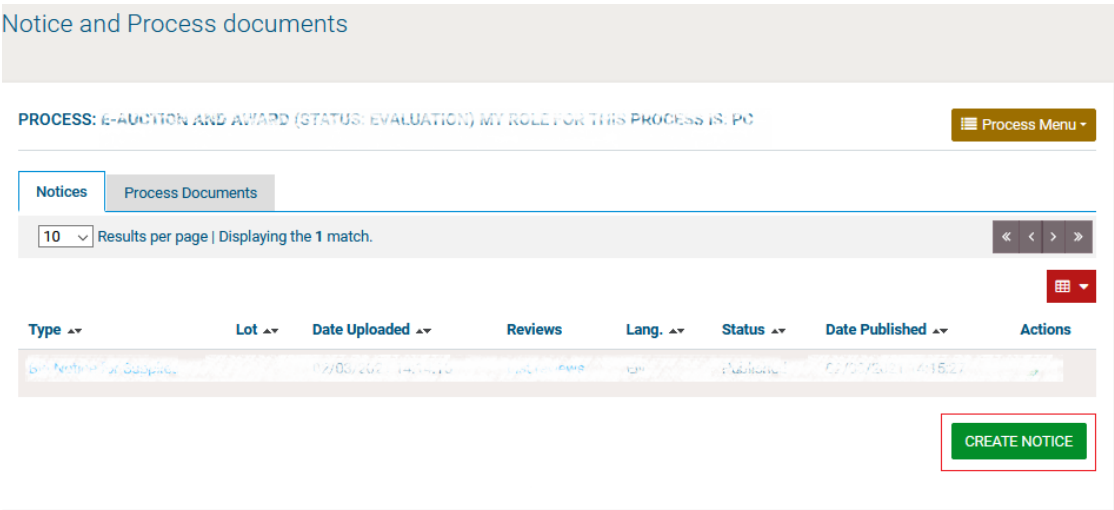


Figure 226: Notice and Process documents page

The user will have to select the "Contract Award Notice" option and then click on the "Forms Module" button.

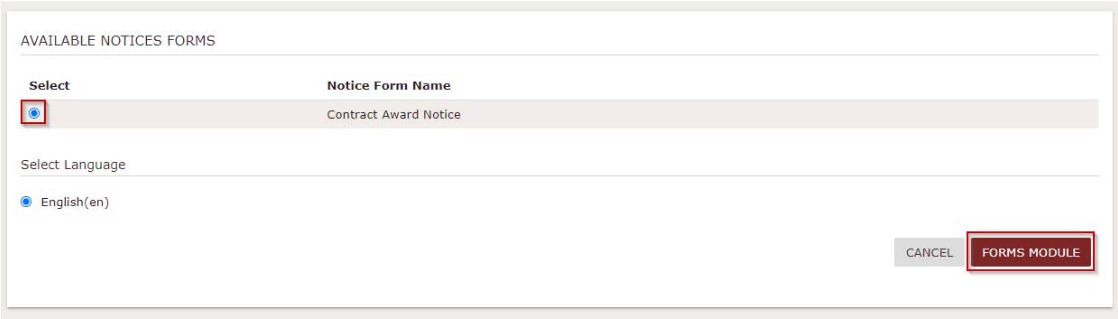


Figure 227: Available Notices Forms

The user will have to create the "Contract Award Notice", save it as draft (in case of needed further changes) and later as final, and proceed with its publication, in order to finish with the Awarding of the Process.

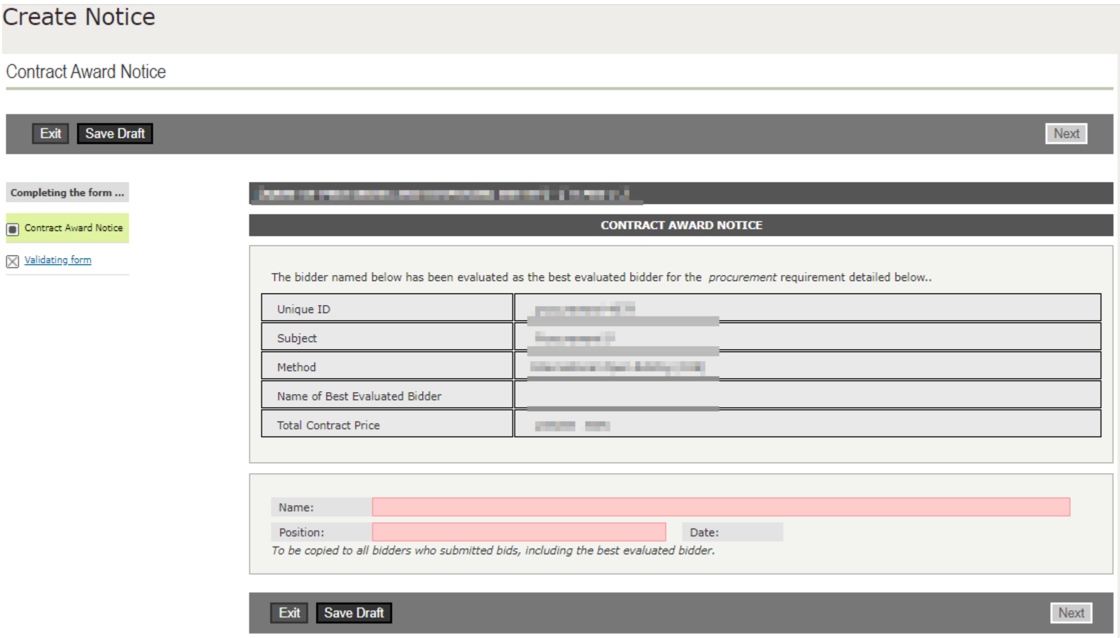


Figure 228: Contract Award Notice creation

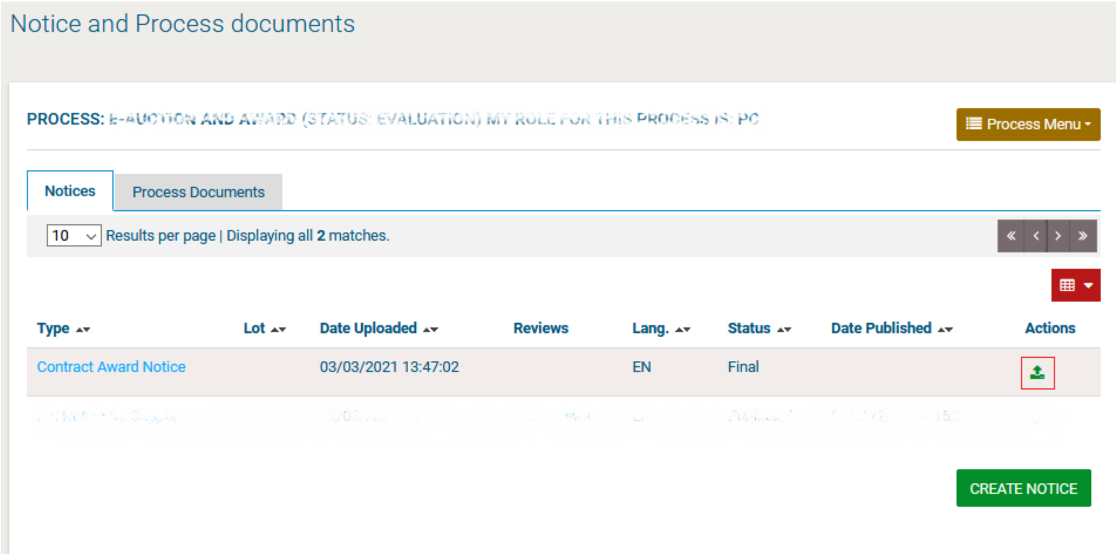


Figure 229: Contract Award Notice publication

3.16 Helpdesk contact details

To contact the eGP helpdesk the user may visit the "Contact Us" link.

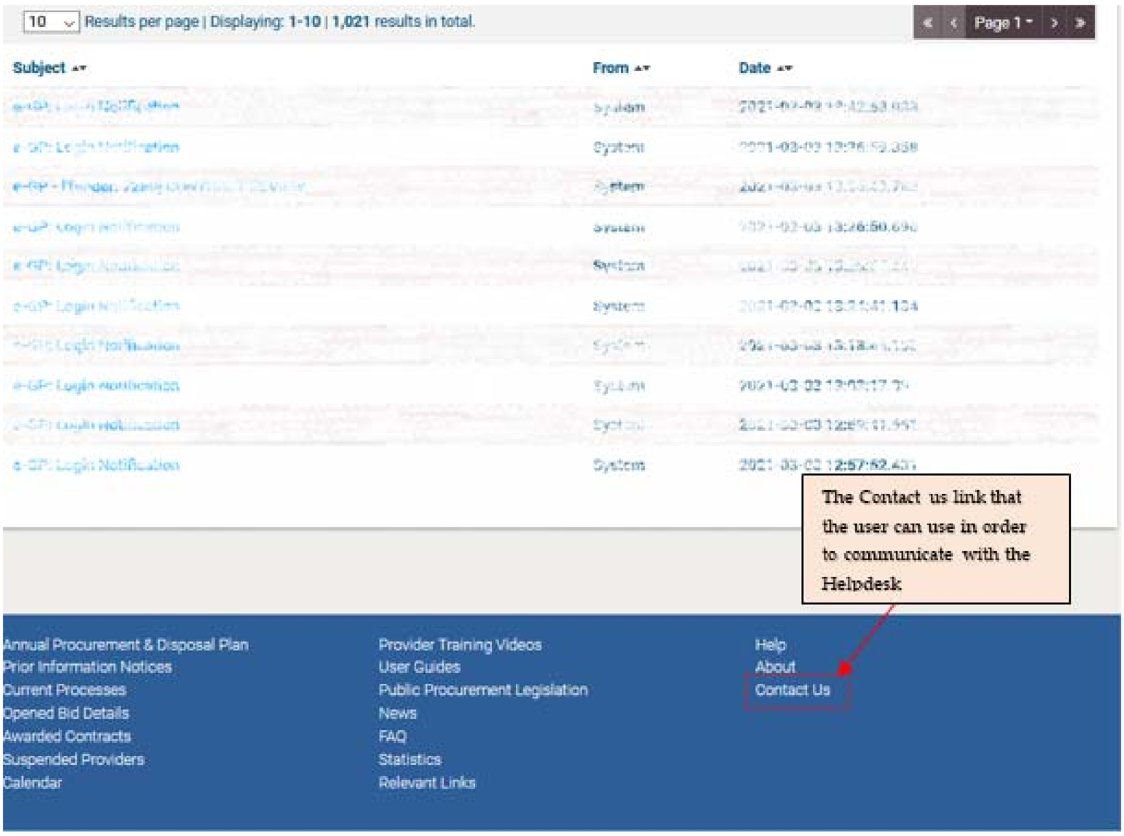


Figure 230: Contact us link

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

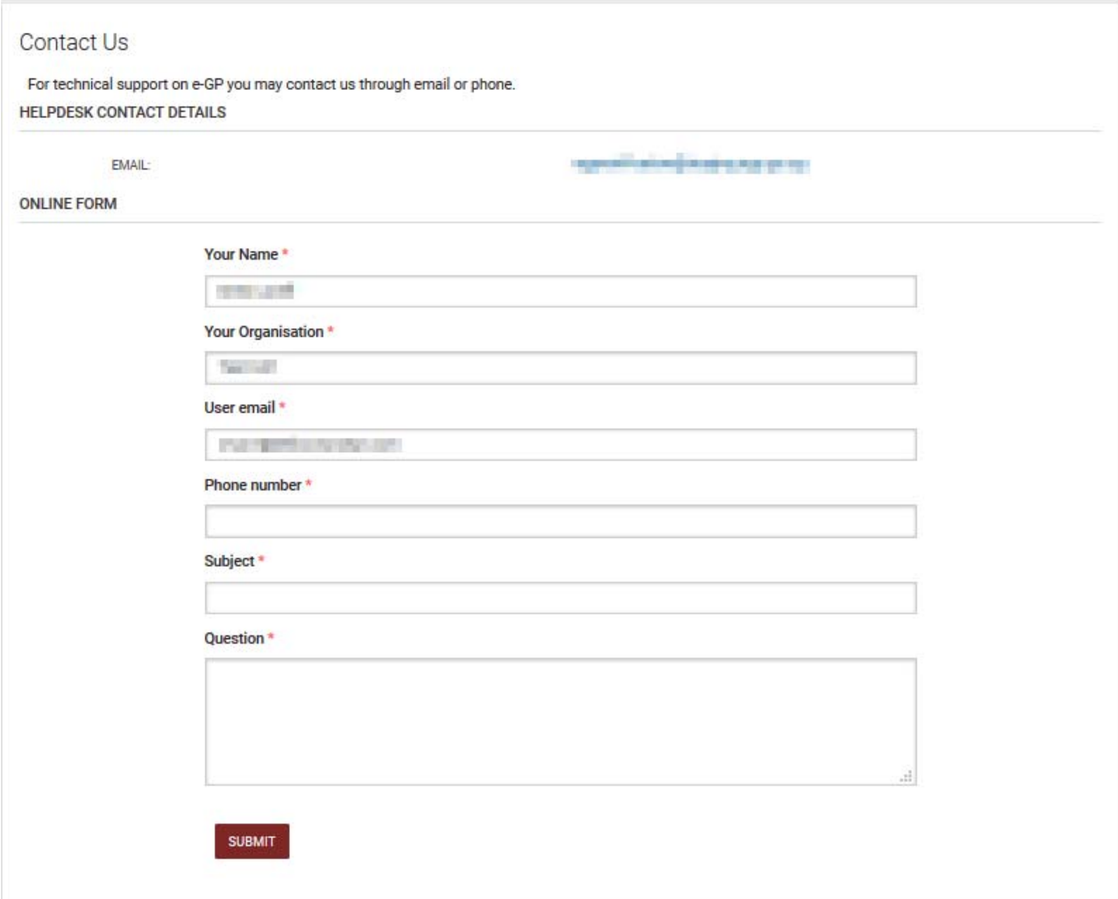


Figure 231: Contact us form