Help for Suppliers

(UK Public Sector)

Version 12.3

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Welcome to Help for Suppliers!

This Help content is designed to explain the eSourcing platform in business terms, allowing Suppliers to quickly understand the features and benefits of the software.

Help content is presented by software module, and divided into software "objects" such as PQQs, ITTs and Auctions - just like the software itself.

The Help pages for each software object provide everything that a Supplier needs to understand the object lifecycle. The process of managing each object is explained in detail, along with the key activities that Suppliers may wish to perform on the object.

The Help content explains the entire eSourcing software functionality, even if some functionality is not currently activated on the platform.

Additional help content is available using the tooltips within the platform. Tooltips are revealed by hovering the mouse over a button or label, and provide the user with technical help on that particular function of the platform.

Suppliers who require urgent technical support may contact the Market Operations Centre, also known as the MOC. MOC contact details are normally displayed on the homepage of each platform.

Dashboard module

The Dashboard provides each Supplier with a selection of Dashboard Portlets that summarise their activities on the platform. Portlets provide a quick overview of a Suppliers work and allow immediate access to current activities:

- [Dashboard](#)

Dashboard

Definition

The Dashboard provides each Supplier with an overview of their own sourcing activities on the platform. A selection of Dashboard Portlets display useful information for most platform modules and provide instant access to the relevant areas. The layout of the Dashboard is customisable, allowing each User to configure the Dashboard for their own use. The Dashboard may be used as the main page for Suppliers, allowing Users accessing the platform to be automatically presented with the information that is most relevant to them.

Dashboard Portlets

The Dashboard supports a range of Portlets that provide information on activities across the platform and link the User to the sources of that information. Some Portlets display information from specific platform functions, such as PQQs Open to All Suppliers, and are available only if the relevant function is activated on the platform.

The Buyer Organisation is able to select the available Portlets for display to Suppliers on the Dashboard. The entire list of Portlets and their functions are as follows:

Supplier Portlets

PQQs & ITTs Open To All Suppliers: Displays a summary of all PQQs/ITTs that are Open to All Suppliers and are currently running, allowing Suppliers to easily review the available PQQs/ITTs and make Expressions of Interest.

PQQs & ITTs Requiring a Response: Display a summary of all running PQQs/ITTs to which the Supplier has been invited but where a response has not yet been submitted, allowing the Supplier to easily view the PQQ/ITT Details and submit a response.

Open and Pending Auctions: Displays a list of all open Auctions to which the Supplier has been invited, and where Bids are invited.

New Messages: Displays lists of all objects, such as PQQs/ITTs or Contracts, that contain unread Messages received within the last 30 days, allowing the User to directly access the new Messages in each object.

Quick Links: Provides the User with links to perform common actions and to access the most commonly used areas of the platform

My Running Surveys: Displays Surveys in progress that the Buyer Organisation has requested the Supplier to respond to.

Activities

Configuring the Dashboard Layout

The Dashboard layout may be configured by the individual User.

The User is able to configure the Dashboard for their own use by changing the arrangement of the columns in the page. Individual Portlets may be easily maximised or minimised, dragged between columns and moved within columns, as required.

The layout of the Dashboard page is saved for each individual User, allowing the User to view the same page layout each time they access the platform.

Projects module

The Projects module allows a Supplier to interact with the Buyer Organisation on sourcing activities, by viewing sourcing Projects, responding to PQQs and ITTs, bidding in Auctions, and performing Contracts.

- Projects
- PQQs & ITTs (PQQs/ITTs)
    - Review PQQ/ITT Details
    - Manage Response
    - Always Open
- Auctions
    - Review Auction Details
    - Auction Monitor
    - Auction Always Open
- Contracts
    - Review Contract Details
    - Contract Always Open

Projects

Definition

A Project is a container created by a Buyer to organise related sourcing activities, such as PQQs/ITTs, Auctions, Contracts, and file attachments.

Projects allow Buyers to organise their sourcing activities efficiently, and allow Suppliers to find related activities more easily.

Each Project typically corresponds to a single execution of the Buyer organisation's sourcing process. The Project contains all the sourcing activities related to that execution of the process.

Suppliers are only able to view those Projects containing objects, such as PQQs/ITTs, in which the Supplier is a participant.

Each Project contains the following areas:

- Project Settings: Displays important information about the Project.
- My Project Objects: Displays any sourcing Objects within the Project, such as PQQs, ITTs, Auctions and Contracts to which the Supplier has access.
- Project Attachments: Displays files attached to the Project by the Buyer.
- Project Activities: Displays information on key Activities planned to occur during the life of the Project.

Project Settings

The Project Settings page displays important information about the Project, such as the Project Code, Title and Reference.
Suppliers should quote this information on any correspondence with the Buyer Organisation, and when contacting the Market Operations Centre.
The Settings page may also display additional information related to the Project including the Project Type, the Project Category, the list of Objects at Project level and any Published Opportunity linked to that Project.
If the Project contains Multiple PQQ/ITT Lots, this information is also displayed to Suppliers on the Project Settings.

My Project Objects

The My Project Objects page displays a list of all Objects such as PQQs, ITTs, Auctions and Contracts published in the Project by Buyers. Objects are grouped into lists by type.
My Project Objects provides a quick summary view of all related Objects and displays important information such as the Response Status and the Closing Date/Time while providing quick access to each individual Object.
Visibility of PQQs/ITTs and Auctions depends on the Supplier having been invited to the Object by the Buyer or by having made an Expression of Interest.
For Contracts, visibility is dependent upon the Supplier having being named by the Buyer as the Main Contractor.

Related PQQ/ITT Opportunities

The Related PQQ/ITT Opportunities page displays a list of PQQs/ITTs Open to All Suppliers published by the Buyer in that Project and in which the Supplier has not yet Expressed Interest.
If the Supplier decides to make an Expression of Interest, the PQQ/ITT will be immediately available in the Project Objects list.
The "View Published Opportunity" button displays all information linked to the Opportunity Listing on the Project, including any related Notices.

Project Attachments

The Project Attachments page displays a list of all the files saved to the Project by Buyers for the attention of participating Suppliers.

Project Attachments are managed using the standard Attachments functionality, which is described in detail here.

Project Activities

The Activities page displays a list of all Activities configured on the Project by the Buyer.
Activities are important milestones within the Project, and may require Suppliers involved in the Project to perform the specified activities by a set point in time.

Activities

Viewing Projects

In order to view a Project in the Project List, a Supplier Organisation must first be invited to, or have made an Expression of Interest in, an Event contained within the Project.

Project Details are accessed by clicking any Project in the Project List.

Project Filters allow a Supplier to easily manage the display of Projects in the List by displaying only those Projects that match the specified criteria.

Viewing a Published Opportunity

A Supplier Organisation has different ways to view a Published Opportunity:

- By receiving an email Alert confirming that a new Opportunity has been published or an existing one has been amended; this Alert allows direct access to the Opportunity through a hyperlink;
- Once logged in, by accessing the Main Page in the published Opportunities area, where both Current and Past Opportunities are immediately available;
- Once logged and having selected the Project area, accessing the Project Details section, and following any related Warning Message link, providing the possibility to make an Expression of Interest in one or more PQQ/ITT Open to All Suppliers included in the Project. In this case a Supplier may view the Opportunity Details and any related Notice, by clicking the "View Published Opportunities" button.

PQQs/ITTs

Definition

A **Pre-Qualification Questionnaire** (or PQQ) is used to collect Qualification and Technical information from Suppliers in order to evaluate the Supplier base and to narrow the field of competition to qualified Suppliers. Closed PQQs on the platform may be finalised and converted into ITTs.

An **Invitation to Tender** (or ITT) is used to collect detailed Technical and Commercial information from pre-qualified Suppliers in the form of a private offer. Closed ITTs on the platform may be converted into Auctions, or awarded, and converted into Contracts.

The generic term "PQQ/ITT" is used to describe the common behaviours of PQQs and ITTs on the platform. Each PQQ/ITT on the platform is managed by a Buyer within the Buyer Organisation. The Buyer is able to configure the Settings of the PQQ/ITT, such as the response deadline and awarding strategy, and decide how Suppliers should be able to participate. The Buyer may also attach files to the PQQ/ITT for the attention of participating Suppliers.

Once the PQQ/ITT has been published to Suppliers, a secure Message area allows Suppliers to communicate with the Buyer during and after the PQQ/ITT process. Any important milestones or changes on the PQQ/ITT are normally communicated to Suppliers by email Alert.

Suppliers should review the details of the PQQ/ITT, and then decide whether to submit a response to the Buyer.

A PQQ/ITT response is created by completing the PQQ/ITT response Envelopes as instructed by the Buyer. Buyers use response Envelopes in PQQ/ITT to gather information from Suppliers in a structured way. Envelopes may include Questionnaires to which Suppliers must respond, and they may also allow Suppliers to upload attachments in response to the PQQ/ITT.

A Supplier's complete PQQ/ITT response must be submitted to the Buyer before the PQQ/ITT Closing Date & Time.

After the Closing Date & Time, the PQQ/ITT will be formally opened and evaluated. Buyers have several options for finalising evaluated PQQs and for awarding evaluated ITTs. The outcome of the PQQ/ITT is normally communicated to Suppliers by email Alert, or through the secure Messages area, and is always reflected in the

Status and Response Status fields of the PQQ/ITT. The Buyer may also publish a results document on the PQQ/ITT, to formally debrief Suppliers, and may award a Contract on the platform on the basis of a successful ITT response.

Each PQQ/ITT contains the following areas, which correspond to the stages of the typical PQQ/ITT workflow:

- **Review PQQ/ITT Details**: Allows the Supplier to view important information about the PQQ/ITT, including any Buyer Attachments, before deciding to respond.
- **Manage Response**: Allows the Supplier to create and submit a Response to the PQQ/ITT.
- **Published Results**: Displays any documents reporting the formal outcome of the PQQ/ITT that have been attached by the Buyer and any Contracts formed with the Buyer Organisation as a result of an ITT.
- **Always Open**: Allows the Supplier to share the PQQ/ITT with colleagues on the platform and to exchange Messages with the Buyer.

Depending on the platform configuration, Buyers may use the **Response Debriefing** area on an ITT, to provide a Debriefing Report to any Unsuccessful Suppliers.

The Debriefing Report is designed to allow a Buyer to share information about the Awarding decision on an ITT, in accordance with EU Public Procurement Remedies Directives.

Activities

Viewing a PQQ/ITT Open to All Suppliers

PQQ/ITT on the platform may be accessible to Suppliers in two ways.

- PQQ/ITT **By Invitation Only** are visible only to registered Suppliers who have been specifically invited by the Buyer. PQQ/ITT By Invitation Only are displayed in the **My PQQs** and **My ITTs** pages.
- PQQ/ITT **Open to All Suppliers** are accessible to any Supplier registered on the platform. PQQ/ITT Open to All Suppliers are displayed in the **PQQs and ITTs Open to All Suppliers** pages.

Suppliers are able to view selected details of a PQQ/ITT Open to All Suppliers, and to decide whether they wish to make an Expression of Interest in the PQQ/ITT.

Expressing Interest in a PQQ/ITT Open to All Suppliers

A Supplier must make an Expression of Interest in any PQQ/ITT Open to All Suppliers in order to submit a response to that PQQ/ITT. The act of Expressing Interest is equivalent to the Supplier being invited to participate in the PQQ/ITT by the Buyer. Once a Supplier has made an Expression of Interest in a PQQ/ITT, the PQQ/ITT

will move from the PQQ/ITT Open to All Suppliers pages, into the My PQQ/ITT pages. Suppliers will receive all email Alerts related to the PQQ/ITT and will have complete access to the PQQ/ITT details, including any Buyer Attachments, the secure Messages area, and all response Envelopes.

The Buyer may specify a number of hours, in advance of the PQQ/ITT Closing Date and Time, by which Expressions of Interest must be performed. At this point the PQQ/ITT will become hidden from any Suppliers having failed to make an Expression of Interest.

Even having made an Expression of Interest, a Supplier must also complete and submit a response to the PQQ/ITT before the Closing Date & Time in order to be considered for evaluation by the Buyer.

Viewing a PQQ/ITT Details

PQQ/ITT Details are accessed by clicking any PQQ/ITT in the PQQ/ITT lists.

Suppliers may Search or Filter the PQQ/ITT lists in order to view a specific PQQ/ITT, or to view a subset of PQQ/ITT in the lists.

The platform provides a set of Standard Filters allowing the Supplier to quickly and easily find the most common subsets of PQQ/ITT. Examples of Standard Filters include Recently Viewed PQQ/ITT and Running PQQ/ITT.

The Search function allows the Supplier to configure searches for PQQ/ITT, using fields from the PQQ/ITT Details or from the Project containing the PQQ/ITT, as criteria. Suppliers may also filter PQQ/ITT according to the PQQ/ITT Status, and by the contents of any Additional Information fields saved on the PQQ/ITT.

Review PQQ/ITT Details

Definition

PQQ/ITT Details contain important information about the PQQ/ITT and its configuration, including a complete description of the PQQ/ITT, the deadline for submitting responses, and files attached to the PQQ/ITT for the attention of Suppliers.

A few PQQ/ITT Details are so important that they are displayed on every page of the PQQ/ITT:

- **PQQ/ITT Project**: Displays the Title of the Project to which the PQQ/ITT relates.
- **PQQ/ITT Code & Title**: Displays the Code of the PQQ/ITT, to be quoted when contacting the Market Operations Centre, and the formal Title of the PQQ/ITT.
- **PQQ/ITT Closing Date & Time**: Displays the deadline for Suppliers to submit responses to the PQQ/ITT.
- **PQQ/ITT Response Status**: Displays the current status of the Supplier response to the PQQ/ITT.

It is imperative that Suppliers review all the PQQ/ITT Details as soon as possible in the PQQ/ITT process, before completing and submitting a PQQ/ITT response to the Buyer.

PQQ/ITT Details are visible from the following areas:

- **PQQ/ITT Settings**: Displays the PQQ/ITT information and configuration.
- **Buyer Attachments**: Displays a list of files attached to the PQQ/ITT by the Buyer.

PQQ/ITT Settings

PQQ/ITT Settings include the Overview information of the PQQ/ITT, and details of the PQQ/ITT configuration. The Settings page is divided into sections of related information:

- **Overview**: Displays important information such as the PQQ/ITT Title & Description, and the Type of Supplier Access, which regulates how Suppliers will be able to participate in the PQQ/ITT.
- **Additional Information Forms**: Additional Information Forms are optional to each Buyer Organisation. Additional Information Forms allow a Buyer Organisation to display information on each PQQ/ITT that is not gathered by the standard platform Settings.
- **Date & Time Information**: Displays the date & time of the latest change to the PQQ/ITT, the publication date, the deadline for Supplier responses to the PQQ/ITT, and an optional deadline for Suppliers to request clarifications. Also displays the selected Option for Viewing Responses, which specifies how the Buyer will be able to view Supplier responses for evaluation.

- **Envelope Settings**: Displays the list of response Envelopes which Suppliers must complete in order to submit a response to the PQQ/ITT.
- **Awarding Strategy**: Displays the method to be used to rank Supplier responses on the PQQ/ITT, including any scoring configuration, and specifies how the PQQ/ITT may be awarded.
- **Anomalous Offers**: Indicates if anomalous Commercial Responses will be automatically excluded from the evaluation process.
- **Terms**: Displays any specific terms under which the PQQ/ITT is being conducted.

Understanding PQQ/ITT Settings

PQQ/ITT Settings describe the configuration of the PQQ/ITT on the platform.

It is important that Suppliers understand the impacts that specific Settings within each section of the Settings page will have on the PQQ/ITT process.

Overview

The Overview section displays important information about the PQQ/ITT, including a full description of the PQQ/ITT, and details of the Buyer managing the PQQ/ITT within the Buyer Organisation.

The Buyer may decide to Allow Suppliers to Respond by Consortium. If this setting is active, a Supplier may use a link within the Qualification Envelope, to specify the details of any other organisations on whose behalf the Supplier is submitting the PQQ/ITT response. The Consortium feature allows Suppliers to formally notify the Buyer that they are responding on behalf of a consortium, and to specify the formal composition of the consortium.

The Type of Supplier Access setting specifies the method by which registered Suppliers may access the PQQ/ITT.

Supplier access may be either By Invitation Only, or Open to All Suppliers:

- Where a PQQ/ITT is **By Invitation Only**, the Buyer must select Suppliers for invitation to the PQQ/ITT. Only invited Suppliers may view the PQQ/ITT and submit a response for evaluation.
- In contrast, where a PQQ/ITT is **Open to All Suppliers**, any registered Supplier may access the PQQ/ITT on the platform and submit a response for evaluation.

The Test field allows a Buyer to flag a PQQ/ITT as being intended specifically for testing and training purposes. Test PQQ/ITT are clearly indicated as such on both Buyer and Supplier sides of the platform. Test PQQ/ITT may be used by the Buyer to allow Suppliers to view the planned configuration of an important PQQ/ITT, and to practice the response process.

Two further configuration options offer additional security features during the PQQ/ITT process. The Send Certified Email feature is available in certain countries, to provide 3rd party verification of the authenticity of all email Alerts sent by the platform during the PQQ/ITT process. The Buyer also may have the option to require PQQ/ITT responses to be digitally signed by Suppliers. This feature requires Suppliers to attach digitally signed PDF documents to each PQQ/ITT Envelope during the response process, providing the Buyer with 3rd party verification of the identity of the individual submitting the response.

Date & Time Information

The Date & Time Information section includes the Closing Date & Time, which is the formal deadline for Supplier responses to the PQQ/ITT. Suppliers must submit a response to the PQQ/ITT before the Closing Date & Time. The platform will generally block any attempt to submit a response after this deadline.

Buyers may specify a deadline for Suppliers to request clarifications on the PQQ/ITT content, allowing late Suppliers queries through the secure Messages area to be automatically declined.

In the case of PQQ/ITT Open to All Suppliers, the Buyer may also specify a number of hours, in advance of the PQQ/ITT Closing Date and Time, by which Expressions of Interest must be performed.

The Option for Viewing Responses setting manages Buyer visibility of submitted Supplier responses:
- **Unsealed**: Submitted responses may be viewed by the Buyer even while the PQQ/ITT is running.
- **Sealed (sequential)**: Submitted responses remain hidden from the Buyer until the PQQ/ITT deadline has passed, and until the evaluation of any preceding Envelopes has been formally ended by the Buyer.
- **Sealed (parallel)**: Submitted responses remain hidden from the Buyer until the PQQ/ITT deadline has passed.

Envelope Settings

The Envelope Settings display the response Envelopes that Suppliers must complete in order to submit a response to the PQQ/ITT.

Each type of Envelope may be used for a slightly different purpose within the PQQ/ITT:
- **Qualification Envelope**: Used to gather information to qualify Suppliers for evaluation in subsequent Envelopes of the PQQ/ITT.
- **Technical Envelope**: Used to gather detailed technical information.
- **Commercial Envelope**: Used to gather price offers.

Awarding Strategy Settings

The Awarding Strategy Settings specify the method to be used for ranking Supplier responses during the finalisation & awarding of the PQQ/ITT.

The platform provides the following options:

- **No Ranking**: Responses are sorted by date & time.
- **Best Technical Score**: The Buyer must specify a Maximum Technical score. Technical responses may be awarded points, up to this maximum, and are ranked accordingly.
- **Best Commercial Score**: The Buyer must specify a Maximum Commercial score. Commercial responses are awarded points, up to this maximum, and are ranked accordingly. Maximum points may be assigned to either the lowest or highest Commercial response.
- **Most Economically Advantageous Tender** (M.E.A.T.): The Buyer must specify Maximum Technical and Commercial scores. Supplier responses are ranked according to the combined Technical and Commercial scores.

Viewing a Summary of the PQQ/ITT

The Printable View function provides Suppliers with a single page summary of the entire PQQ/ITT, including all Settings, Buyer Attachments, and response Envelopes.

Response data is also visible within the Printable View once a Supplier begins to create a response to the PQQ/ITT, by responding to the Questionnaires in each Envelope, and by attaching files into the Envelopes.

Printable View allows the Supplier to easily review the entire PQQ/ITT, and to print or save the details in PDF format for sharing with colleagues.

Buyer Attachments

The PQQ/ITT Buyer Attachments page displays a list of files attached to the PQQ/ITT by the Buyer. Buyers attach files to a PQQ/ITT for the attention of participating Suppliers, and may organise the files into folders of related information. Buyer Attachments are a very important part of the PQQ/ITT, and should be downloaded and read by all Suppliers as soon as possible.

PQQ/ITT Attachments are managed using the standard Attachments functionality.

Note: Please download and read all Buyer Attachments as soon as possible.

Manage Response

Definition

Suppliers participating in a PQQ/ITT should first review the details of the PQQ/ITT, and then decide whether to submit a response to the Buyer.

A PQQ/ITT response is created by completing the PQQ/ITT response Envelopes as instructed by the Buyer.

PQQ/ITT response Envelopes may be completed by answering online Questionnaires, and by attaching files into the response.

The Submit Response area allows a Supplier to view the PQQ/ITT Questionnaires, to edit and save a response to the PQQ/ITT over a period of time, and to submit the completed response to the Buyer.

A Supplier's complete PQQ/ITT response must be submitted to the Buyer before the PQQ/ITT Closing Date & Time.

My Response

The My Response page allows a Supplier to manage the process of responding to the PQQ/ITT.

Suppliers must respond to a PQQ/ITT by completing all mandatory Questions within the Qualification, Technical and Commercial Questionnaires, and by attaching any files requested by the Buyer.

The My Response page includes a Response Summary, which provides feedback on the completion of the response and confirms when all mandatory Questions have been answered.

Deciding to Respond

Suppliers always have the option to accept the invitation to respond to the PQQ/ITT, or to decline to respond.

The act of accepting the invitation to respond is the first stage in the process of creating and submitting a response. Alternatively, if for any reason a Supplier does not intend to submit a response, the Supplier may formally decline to respond. The decision to decline the PQQ/ITT is visible to the Buyer, and the Supplier is requested to provide a comment on the decision.

A Supplier may decline to respond to the PQQ/ITT and subsequently may reverse this decision at any time before the PQQ/ITT Closing Date & Time.

Conversely, a Supplier may accept the invitation and create a response, and may subsequently reverse this decision and delete the response before the Closing Date & Time. Responses to a Sealed PQQ/ITT may be deleted before the Closing Date & Time, even if submitted to the Buyer, whereas responses to an Unsealed PQQ/ITT may only be deleted if not submitted to the Buyer.

Completing PQQ/ITT Response Forms

Suppliers may be required to complete up to 3 Response Forms, depending on the Envelopes configured on the PQQ/ITT.

Suppliers must respond to a PQQ/ITT by answering all mandatory Questions (indicated by a red asterisk) within each Form.

Conditional Linked Sections of Questions may be presented to Suppliers as a result of their response to a trigger Question. These Sections remain hidden if the specific response which is linked to the Section is not selected.

Buyers may provide an instructional attachment on each Question, to give advice on how a Supplier should respond. Instructional attachments are available to Suppliers only whilst editing the PQQ/ITT response.

Items in the Commercial Envelope Form may be mandatory or optional. In the case of optional Commercial Items, the Supplier must formally indicate whether they intend to respond to each individual Item. Suppliers may create and modify the PQQ/ITT response over time, but must submit the complete response to the Buyer before the PQQ/ITT Closing Date and Time.

Submitted responses may continue to be modified even until the Closing Date and Time. In this case, each act of saving a modification to the response will create a new version of the response. The Buyer will evaluate the Supplier using the latest response submitted to the PQQ/ITT.

Where the Basic or Extended Supplier Profiles are available on the platform, Sections within the Qualification and Technical Envelopes may be one of two types. PQQ/ITT Sections are used to gather responses which will be used for evaluation on the individual PQQ/ITT. In contrast, Profile Sections contain Questions selected from the Supplier Profile. Supplier responses to Profile Questions in a PQQ/ITT are automatically populated from the responses already saved in the Supplier Profile, saving Suppliers time in the PQQ/ITT response process. Any changes to Supplier Profile responses in the PQQ/ITT are saved back to the Supplier Profile upon the evaluation of the PQQ/ITT.

Exporting & Importing a Response in Excel

As an alternative to creating a PQQ/ITT response by completing the Response Forms online, Suppliers may create or edit responses to Envelopes offline, and then import the response into the platform.

The platform provides Suppliers with an Excel spreadsheet containing all the Response Forms from the PQQ/ITT. A Supplier may export and save the response spreadsheet to their own computer, and enter responses to Questions within the spreadsheet. The saved spreadsheet containing the responses may then be imported back into the platform, in order to populate the responses to the PQQ/ITT Envelopes.

If the Questionnaire contains Conditional Linked Sections, responses to these sections completed in the Excel form will only be imported if the Supplier has selected the response which triggers the Section; this response is indicated above the Conditional Section of Questions in the Excel form.

Attaching Files to a Response

The Buyer may allow Suppliers to attach files in support of the PQQ/ITT response.

Files may be attached to any Attachment Question within the Qualification and Technical Envelopes. Each Attachment Question allows the Supplier to respond by uploading a single file attachment. Attachment Questions may be mandatory, meaning that a Supplier must attach a file to the Question in order to submit a complete response.

In addition to Attachment Questions, the Buyer may allow Suppliers to attach multiple files into the Additional Attachments area of each Envelope. Additional Attachments are not mandatory, and allow Suppliers the option to upload any files that are required to support the response to the specific Envelope.

Since each response Envelope must be opened and evaluated in a set sequence, it is important that Suppliers upload any Additional Attachments into the correct response Envelope. If files are uploaded into the incorrect Envelope, then the files may not be visible to the Buyer during the evaluation of the correct Envelope, and the Supplier response may be penalised accordingly.

Submitting a Response

In order to submit the PQQ/ITT a Supplier must first complete all mandatory Questions within each response Envelope.

The PQQ/ITT response must be submitted to the Buyer before the PQQ/ITT Closing Date & Time in order to be included in the PQQ/ITT evaluation.

The Supplier is required to review the response contents, and to confirm the response submission to the Buyer. A submitted response may be modified, but may not be withdrawn.

The Supplier will receive an email Alert confirming the successful submission of the response, and the Response Status of the PQQ/ITT will be updated to indicate that the response has been submitted.

Modifying an Already Submitted Response

Submitted responses may be modified at any time before the PQQ/ITT Closing Date & Time.

Response Debriefing

Depending on the platform configuration, Buyers may use the Response Debriefing area on an ITT, to provide a Debriefing Report to any Unsuccessful Suppliers.

The Debriefing Report is designed to allow a Buyer to share information about the Awarding decision on an ITT, in accordance with EU Public Procurement Remedies Directives.

Always Open

Definition

Specific areas of functionality are always available to Suppliers on every PQQ/ITT:

- Messages: Allows Suppliers to communicate with the Buyer during and after the PQQ/ITT process.
- User Rights: Allows the Supplier to manage the Right of Users to access the PQQ/ITT.

Messages

A secure Messages area allows Suppliers to communicate with the Buyer during and after the PQQ/ITT process. The Messages area allows Suppliers to easily contact the Buyer with any queries about the PQQ/ITT, and provides a complete audit trail of all communications between the parties during the PQQ/ITT.

The Received, Sent, Draft and Forwarded Messages pages display all Messages related to the PQQ/ITT.

The Messages functionality should be used as the sole means of communication with the Buyer on issues related to the PQQ/ITT process.

Messages on the platform are not emails, and Suppliers must first login to the platform in order to read and send Messages. Suppliers will receive an email Alert informing them of each new Message Received.

Any important milestones or changes on the PQQ/ITT are also communicated to Suppliers by email Alert.

PQQ/ITT Messages are managed using the standard Messages functionality.

User Rights

The User Rights area displays a list of all Supplier User accounts on the platform with the general User Rights to "View PQQ/ITT" and "Create Response".

The Supplier may edit the list in order to assign permission for each User to access to the current PQQ/ITT. Users assigned permission to access the PQQ/ITT will receive an email Alert, requesting that they login to the platform and access the PQQ/ITT.

The Rights of individual User accounts to perform specific tasks on the PQQ/ITT, and on other objects within the platform, are managed from the User Management area.

Auctions

Definition

An Auction is a dynamic sourcing event in which Suppliers make competing price offers to the Buyer in real-time. Buyers configure the Details of each Auction in order to specify Auction Settings, such as the Auction direction (forward or reverse), the Auction type (single-item, multiple-item or parametric), the rules for the visibility of bids to Suppliers, and the rules for concluding the running phase of the Auction.

Suppliers should review the Auction Details, including any files attached to the Auction by the Buyer. A secure Messages area allows Buyers and Suppliers to communicate before and after the Auction running phase.

The Auction running phase is managed using a separate interface known as the Auction Monitor.

After the running phase is completed, an Auction may be automatically awarded to the best bid, or the Buyer may formally evaluate the received bids and have the discretion to award the Auction.

The platform provides a range of reports on each Auction, allowing Buyers to provide debriefing information to Suppliers in the form of published Auction results.

Each Auction contains the following areas, which correspond to the stages of the typical Auction workflow:

- Review Auction Details: Allows the Supplier to review the Auction Settings and any Buyer Attachments.
- Auction Monitor: Allows the Supplier to issue bids during the running phase of the Auction.
- Bid History: After the Auction has been formally awarded by the Buyer the Bid History page displays details of all Bids placed by the Supplier during the running phase of the Auction.
- Published Auction Results: Displays any documents reporting the formal outcome of the Auction that have been attached by the Buyer and any Contracts formed with the Buyer Organisation as a result of an Auction.
- Auction Always Open: Allows the Supplier to manage access to the Auction and exchange Messages with the Buyer.

Activities

Viewing an Auction

Auction Details are accessed by clicking any Auction in the Auction List.

Suppliers may Search or Filter the Auction list in order to view a specific Auction, or to view a subset of Auctions in the list.

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The Search function allows the Supplier to configure searches for Auctions, using fields from the Auction Details or from the Project containing the Auction, as criteria.

Suppliers may also filter Auctions according to the Auction Status, and by the contents of any Additional Information fields saved on the Auction.

Bidding in an Auction

Suppliers are able to bid on Auctions through the secure Auction Monitor interface.

The Auction Monitor is available once an Auction has been confirmed by the Buyer and is accessible from the Auctions list, and from within the Review Auction Details pages.

The Auction Monitor allows Suppliers to view the Auction in running phase and to issue bids. Buyers use the Auction Monitor to view Supplier activity and monitor incoming bids, to communicate with Suppliers during the running phase, and to manage the progress of the running Auction.

Review Auction Details

Definition

The Auction Details area displays the configuration of the Auction as specified by the Buyer.

It is important that Suppliers review the Auction Details including any Buyer Attachments before the Auction is confirmed and before the running phase of the Auction begins.

Auction Details are displayed in the following areas:

- Settings: Configuration of the Auction specified by the Buyer.
- Buyer Attachments: Files attached to the Auction by the Buyer, for the attention of Suppliers.
- Items List: Items specified in multiple-Item Auctions.
- Lots List: Lots specified in a Japanese Auction.
- Parameters List: Parameters specified in Parametric Auctions.
- Other Currencies: Currencies specified in multiple-Currency Auctions.

Settings

Auction Settings allow the Buyer to enter the header information of the Auction and to configure the Auction behaviour.

The Settings page is divided into sections of related information:

- Overview: Allows the Buyer to enter important information such as the Auction Title & Description, and to configure the Auction Direction. The Overview section also permits the configuration of M.E.A.T. Auction variables.
- Additional Information Form: Additional Information Forms are optional to each Buyer Organisation. Additional Information Forms allow a Buyer Organisation to gather data on each Auction that are required by the Organisation, but are not gathered by the platform Settings.
- Date & Time Information: Displays the date & time of the latest change to the Auction, and the publication date.
- Date & Time Settings: Allows the Buyer to specify the date & time of the running phase of the Auction, and provides options for ending the running phase. In a Multiple Lot Auction grouping with Shared Session, the Date & Time Settings of individual Auction Lots must be managed from the Multiple Lot Auction.
- Bidding Variables: Allows the Buyer to specify the methods by which Suppliers may Bid during the running phase Auction. Bidding Variables include the Auction Type (single Item, multiple Item or

Parametric), Currencies, Base Price & Reserve Price, Bid Decrements/Increments, and whether any Pre-Bids may be specified.

- Display: Allows the Buyer to manage the display of Supplier and Bid details to both Buyers and Suppliers during the running phase of the Auction.
- Awarding: Allows the Buyer to specify how the Auction may be awarded, and provides options for the inclusion of Suppliers in the awarding process.
- Anomalous Offers: Allows the Buyer to configure the Auction to automatically exclude anomalous Bids.
- Terms: Allows the Buyer to record any specific terms under which the Auction is to be conducted.

Confirmation of an Auction

An Auction must be published by the Buyer in order to be visible to invited Suppliers. The act of publishing the Auction enables Suppliers to view the Auction Details including any Buyer Attachments.

Suppliers are able to access the secure Messages area of published Auctions, enabling Buyers and Suppliers to engage in a dialogue on the Auction Details, before the Auction is confirmed for running. During this phase of the Auction, any unlocked Auction Details and Settings may be modified by the Buyer.

An Auction must be formally confirmed by the Buyer before it may enter the running phase. The act of confirming the Auction causes all Auction Details, including any remaining unlocked Settings, to become locked.

Viewing a Summary of the Auction

Suppliers may use the Printable View feature to view a single page summary of the complete Auction Details.

Printable View allows Suppliers to easily save the Auction Details including information about their last submitted bid for viewing offline, sharing with colleagues or converting into PDF which may be used where the Buyer Organisation requires Digitally Signed Confirmation of the bid at the end of the Auction.

Buyer Attachments

The Buyer Attachments page displays a list of files saved to the Auction by Buyers.

Buyers use the attachments page to share important documentation related to the Auction with Suppliers.

Invited Suppliers may access the attached files individually, or use the Mass Download feature to download all Buyer Attachments in a single operation.

Items List

Multiple-Item Auctions allow the Buyer to specify a list of Items against which Suppliers may issue bids.

Suppliers are required to enter prices against all Items in the Item List. The values of Supplier offers on individual Items are multiplied by the Quantity of each Item, and the resulting Item sub-totals are combined to create a Total for each Supplier bid.

Lots List

In a Japanese Auction the Buyer may specify one or more Lots. The details of each Lot are shown in the Lots List area. During the Auction, the Suppliers are invited to Accept or Decline the Offered Bid for each Lot, proposed by the Buyer in each Round.

Parameters List

Parametric type Auctions may be configured with multiple Parameters to gather and modulate Supplier Bids. Auction Parameters may be of 3 types:

- Price: Allows the Buyer to specify Price Items for inclusion in the Parameters List.
- Offset: Allows the Buyer to specify a value by which other Parameters in the List will be adjusted in order to calculate each Supplier's total Bid.
- Discount: Presents the Supplier with a value and requires the Supplier to enter a percentage discount rate in order to calculate a sub-total within the Parameters List.

Currencies

The Currencies page displays a list of Currencies for use in a Multiple-Currency Auction.

During the Auction running phase, Suppliers have the option to use any listed Currency to place bids. The Auction Monitor provides Currency conversion functionality to Buyers and Suppliers, converting the bid values into the main Auction Currency on the basis of the exchange rates specified for each Currency in the Currency List.

Auction Monitor

Definition

The running phase of the Auction is managed through a secure interface known as the Auction Monitor.
Suppliers use the Auction Monitor in order to connect to the running Auction and to issue bids to the Buyer.
A separate version of the Auction Monitor allows the Buyer to easily view Supplier connectivity and bidding activity, while enabling the Buyer to communicate with connected Suppliers and to manage the running of the Auction.

The Auction Monitor becomes available once the Auction has been confirmed and 15 minutes before the Auction starts, and remains available even after the Auction running phase has ended. The Buyer may exclude a Supplier from an Auction at any time. If this occurs while the Supplier is in the Auction Monitor, the Supplier will receive onscreen notification and will no longer be able to place bids or send messages.

The Auction Monitor is available to Buyers and Suppliers in both Java applet and HTML formats. The HTML Auction Monitor offers reduced functionality compared to the Java Auction Monitor, and should be used only when Java is not available.

Note: Any Supplier who experiences problems connecting to the Auction Monitor of an Auction in Running status is advised to please contact the Market Operations Centre immediately. MOC contact details should be prominently displayed on the home page of the platform, or be communicated to all Suppliers before the Auction.
Auctions

The Auction Monitor displays important information about each running Auction, such as the Time Remaining, the Base Price, Reserve Price and the Minimum Bid Decrement/Increment, allowing Suppliers to quickly analyse the running phase of the Auction.

Bidding activity is clearly summarised to display the Suppliers bids, and possibly the Bid Ranking of the bids in relation to bids placed by other Suppliers in the Auction.

In the case of Multiple Lot Auction groupings, the Auction Monitor displays a list of all Auction Lots within the grouping allowing the Supplier to quickly navigate between running Lots.

Depending on the platform configuration, Suppliers may be required to accept a specific User Agreement before accessing the Auction Monitor.

In case of Dutch Auctions, once the Java Monitor is opened, the lower right quadrant of the Auction Monitor will show:

- For Lot based Auctions, all information about the time remaining, the round and the Offered Bid Amount, together with an area where any potential bid can be placed;
- For Quantity based Auctions, all the above information is available together with the remaining Quantity, the Maximum Bid and the Minimum Bid Quantity and an area where any potential Quantity bid can be placed.

In the case of Japanese Auctions, the lower quadrants of the Java Auction Monitor are divided in two; showing the Auction Details on the left, including the Round information and Message area and the Bidding Area on the right, where the Supplier is shown the Offered Bid for each Lot and may select to Accept or Decline the Offered Bid for each Lot in the current Round.

Viewing Auctions

Each User may configure specific Auction Viewing Options in order to manage the way that information is presented within the Auction Monitor.

The upper part of the Auction Monitor displays all Auctions in which the Supplier may participate, and the lower quadrants display the Auction Details, Bids and Messages.

The User may select the columns to be displayed in any of the lists within the Auction Monitor, and may sort all lists by individual column headings, and maximise or minimise each frame as required.

Bids

All bids placed by the Supplier are tabulated in the Bids area of the Auction Monitor, allowing the Supplier to quickly sort bids according to various criteria such as the Bid Value or Bid Rank.

The visibility of the current Best Bid in an Auction depends on the Auction settings. For example, if the Auction is not in blind mode, and if there is at least one bid submitted, if configured by the Auction's creator, this information is in the Lower Right Quadrant.

Submitting Bids

Note: An Auction Bid represents a formal offer by the Supplier to provide the relevant good or service to the Buyer Organisation at the issued Bid value, and on the terms stated by the Buyer in the Auction details, and all issued Bids are legally binding on the Supplier. In the event that a Supplier mistakenly

issues an incorrect Bid value, the Supplier must inform the Market Operations Centre of any errors immediately.

Suppliers placing Bids on an Auction must respect the Bidding Variables specified by the Buyer within the Settings page of the Auction Details. Bidding Variables specify, for example, the Minimum Bid Decrement or Increment by which Suppliers must improve on a previous Bid in order to issue a valid Bid.

Any Bids that fail to comply with the Bidding Variables specified in the Auction Settings page are automatically rejected by the Auction Monitor.

Bids are placed on a running Auction by entering a valid Bid Value into the Bid field of the Auction Monitor and issuing the Bid to the Buyer.

In Multiple-Item Auctions, Suppliers are required to enter Unit Prices for all Items. The Unit Price values are combined in order to calculate the Total Bid Value, which is then issued to the Buyer.

In Parametric Auctions, Suppliers are required to enter Bids for all Price and Discount Parameters. The Bid values of the Price and Discount Parameters are calculated and combined with the value of any Offset parameter in order to calculate the Total Bid Value, which is then issued to the Buyer.

In Dutch Auctions, Suppliers are required to enter Bids or Quantity Bids according to the Auction type.

In Japanese Auctions, Suppliers may accept or Decline a Bid value which is specified by the Buyer.

Messages

The Messages area of the Auction Monitor allows the Buyer to display Messages to all participating Suppliers.

Particular only to Japanese Auctions, the Supplier may also send messages to the Buyer.

The Auction Monitor Messages area replaces the standard secure Messages area as the correct means of communication between Buyers and Suppliers during the running phase of the Auction.

Messages are displayed to Suppliers within the Suppliers own Auction Monitor.

All Messages sent and received through the Auction Monitor are recorded and displayed to provide a complete audit trail of communications between the parties during the Auction running phase.

Auction Always Open

Definition

Specific areas of functionality are always available to the Supplier on every Auction.

Auction areas Always Open to Suppliers are as follows:

- Messages: Allows the Supplier to communicate with the Buyer except during the running phase of the Auction.
- User Rights: Allows the Supplier to manage the Rights of colleagues to access the Auction.

Messages

The Auction Messages area displays all Messages exchanged between Buyers and Suppliers during the current Auction.

Messages provide a secure method for Buyers and Suppliers to communicate before and after the Auction running phase, and should be used as the only means of communication with the Buyer regarding the Auction process.

Message reports from the Auction provide the Supplier with a complete audit trail of all communications with the Buyer during the Auction lifecycle.

During the Auction running phase, Suppliers may communicate with the Buyer through a separate Messages area within the Auction Monitor.

Warning:

Auction Messages should be used as the only means of communication with the Buyer regarding the Auction process before and after the Auction running phase.

Each Message recipient will receive an email Alert, informing them that a new Message has been received on the Auction. The email Alert includes a link direct to the new Message on the Auction, but does not include the Subject or contents of the Message.

Auction Messages are managed using the standard Messages functionality.

User Rights

The Auction User Rights area allows the Supplier to manage access to the current Auction by colleagues within the Supplier Organisation.

User Rights on the Auction are defined by the Rights assigned to the User account in the accounts own User Details page.

Contracts

Definition

A Contract on the platform allows a Buyer Organisation to formally record the awarding of business to a single registered Supplier, known as a Main Contractor.

The Buyer Organisation is able to easily maintain a secure repository of awarded Contracts for audit purposes, recording all important Contract Details and documentation. Contract information can be easily shared within the Buyer Organisation, and the Contract Management module may be configured to make selected details of each Contract visible to Main Contractors. Buyer Organisation may configure Contracts in order to involve Main Contractors in the negotiation of important Contract related information as Pricing, Master Document Additional Information.

A Buyer may create a Contract within a Project, independent of any other sourcing objects. Alternatively, a Contract may be created from the awarding pages of an ITT or Auction, in which case the Contract may inherit the Main Contractor, Items and Prices awarded on the ITT/Auction.

Each Contract is assigned to a User within the Buyer Organisation who acts as the Contract Manager. The Contract Manager is able to monitor important dates in the lifecycle of each Contract, such as the Contract Start and End Dates, and to record common Contract amendments, such as changes to the End Date or to agreed Prices.

If the Performance feature has been configured, the Contract Management module allows the Contract Manager to monitor and evaluate the Main Contractor's Performance on each Contract. Performance evaluations may be configured to make selected details visible to the Main Contractor.

Contract Management activities are supported by specific email Alerts on each Contract, which may be configured to remind involved Buyers and/or the Main Contractor about important milestones. Each Contract may include a specific Alert on the Contract Settings to remind Users about the Contract End Date.
A secure Messages area secure Messages area allows Contract Manager and the Main Contractor to communicate once the Contract has been activated. Contract Messages provide all parties with an automatic audit trail of communications during the Contract lifecycle.

The lifecycle of each Contract involves the progression of the Contract through the following statuses:

- **Created**: The default status for all new Contracts. Contracts may be configured to be negotiated with Main Contractors in terms of Pricing, Master Document and Additional Information.
- **Active**: A Contract becomes Active once it has been formally activated by the Buyer or Contract Manager, and normally remains Active until its End Date is reached. The Contract may still be amended by the Contract Manager. Once a Contract has been activated, the Main Contractor may view selected Contract Details, including any files attached to the Contract by the Buyer Organisation.
- **Terminated**: In exceptional circumstances an Active Contract may be Terminated by the Contract Manager. Contract Termination is used to indicate that the Contract has been ended prematurely, for example due to a serious failure of Performance by the Main Contractor.
- **Expired**: An Active Contract will automatically become Expired once it passes the End Date configured by the Buyer. Expired contracts may be "extended" by the Buyer changing the End Date to a later date.

Each Contract contains the following areas:
- ***Review Contract Details:*** Allows the Supplier to view important information about the Contract, including any Attachments, and possibly including any Prices and Subcontractors, if configured by the Buyer. If the Contract is configured to be negotiated, here Buyer can share proposal with Main Contractors
- **Contract Always Open**: Allows the Supplier to share the Contract with colleagues on the platform and to exchange Messages with the Buyer.

Activities

Viewing a Contract

Contract Details are accessed by clicking any Contract in the Contract list.

Suppliers may Search or Filter the Contract list in order to view a specific Contracts, or to view a subset of Contracts in the lists.

The platform provides a set of Standard Filters allowing the Supplier to quickly and easily find the most common subsets of Contracts. Examples of Standard Filters include Contracts Expiring Soon.

The Search function allows the Supplier to configure searches for Contracts, using fields from the Contract Details or from the Project containing the Contract, as criteria.

Suppliers may also filter Contracts according to the Contract Status, and by the contents of any Additional Information fields saved on the Contract.

Review Contract Details

Definition

Once a Contract has been created, the Buyer or Contract Manager is able to configure the Contract Details for display to the Main Contractor.

Contract Details contain important information about the Contract and its configuration, including a complete Description of the Contract, the Contract End Date, and files attached to the Contract for the attention of the Main Contractor.

A few Contract Details are so important that they are displayed on every page of the Contract:

- Project: Displays the Title of the Project to which the Contract relates.
- Contract Code & Title: Displays the Code of the Contract and the formal Title of the Contract.
- End Date & Time: Displays the Date and Time at which the Contract will formally expire.
- Contract Status: Displays the current status of the Contract.

The Contract is visible to the Main Contractor once Contract has been formally activated by the Buyer Organisation and during negotiation of important information as Pricing, Master Document and Additional Information.

It is imperative that the Main Contractor reviews all the Contract Details as soon as possible in the Contract lifecycle.

Contract Details may continue to be edited by the Buyer or Contract Manager, even during the active phase of the Contract lifecycle.

Contract Details are visible from the following areas:

- Settings: Allows the Buyer to configure the behaviour of the Contract
- Subcontractors: (Optional, depending on the Contract Settings): Allows the Buyer Organisation to record any Subcontractors to the Main Contractor
- Attachments: Allows the Buyer Organisation to share files with the Main Contractor
- Additional Information (Optional, depending on the Contract Settings): Allows the Buyer Organisation to record additional information related to the Contract; the buyer Organisation may allow Main Contractor editing Attachments: Allows the Buyer Organisation to share files with the Main Contractor
- Subcontractors: (Optional, depending on the Contract Settings): Allows the Buyer Organisation to record any Subcontractors to the Main Contractor

- Attachments: Allows the Buyer Organisation to share files with the Main Contractor
- Prices: (Optional, depending on the Contract Settings): Allows the Buyer Organisation and the Main Contractor to share visibility of the current approved Prices under the Contract; the buyer Organisation may involve Main Contractor on negotiation of Prices List.
- Master Document (Optional, depending on the Contract Settings): Allows the Buyer Organisation and the Main Contractor to share visibility of the current approved Master Document under the Contract; the buyer Organisation may involve Main Contractor on negotiation of Master Document.

Settings

The Settings page allows the Buyer to configure the behaviour of the Contract and to record important Contract information.

The Overview area of the Settings page allows the Buyer to record important Contract information such as the Description, Reference Code, Start and End Dates, Total Value and Contract Currency.

Buyers may also use the Settings page to associate Categories to the Contract.

Viewing a Summary of the Contract

The Printable View function provides Suppliers with a single page summary of the entire Contract, including all Settings, Additional Information, Attachments, Subcontractors and Prices.

Printable View allows the Supplier to easily review the entire Contract, and to print or save the details in PDF format for sharing with colleagues.

Subcontractors

The Subcontractors page is available only if enabled from the Overview area of the Contract Settings page.

The Subcontractors page allows the Buyer to record the identities of any Registered Suppliers who may be working for the Main Contractor in the Performance of the Contract.

The list of Subcontractors is normally visible to the Main Contractor following the Contract activation.

Attachments

The Attachments area allows the Buyer to attach Files related to the Contract, for sharing with the Main Contractor.

In the case of a Contract created from an awarded RFQ, the response Attachments of the awarded Supplier on the RFQ may be automatically copied across to the Attachments area of the Contract.

Attachments are managed according to the [[standard Attachments functionality]].

Additional Information

The Additional Information page displays any predefined Additional Information fields associated to the Contract. Additional Information fields provide the Buyer Organisation with a flexible method to record any required data against a Contract; the buyer Organisation may allow Main Contractor editing Additional Information.

Prices

The Prices area is available only if enabled from the Overview area of the Contract Settings page.
The Prices area allows the Buyer to record information about the pricing of individual Commercial Items within the Contract.

In cases where the Contract has been created from an ITT or Auction, the Price structure may be copied automatically from the originating ITT/Auction on creation of the Contract.

The Buyer Organisation may configure Contract to negotiate Prices with Main Contractor; in case, Main Contractor is asked to Accept or Decline the Proposal sent by buyer. If allowed, Main Contractor may send a Counter Proposal to Buyer.

Prices on an active Contract may be amended by Buyer Organistation Any changes saved to the Price schedule after Contract activation will create a new version of the Price schedule and, if configured, a new negotiation may be required.
Previous versions of the Price schedule are saved for audit purposes.

Viewing Contract Prices

Prices on a Contract are normally visible to the Main Contractor <u>during negotiation or</u> after Contract activation.

The Price schedule is divided into Sections of related Price Items. Each Price Item includes a Unit of Measurement, a Quantity and a Unit Price, which are combined to display a Total Price.

The Price schedule also displays Total Price of each Section, and of all the Contract Sections combined.

The Price of each individual Price Item may be changed over time by the Buyer Organisation in agreement with the Main Contractor. Each change to the Price schedule automatically creates a new Version of the Price schedule.

All Previous Price schedules remain visible to the Main Contractor during and after the Contract lifecycle. Each Version includes an Effective Date of Change, which specifies the point from which the new Prices are to be applied.

Prices area provides some important information related to the Price list as the Version of the Price List Proposal, the status of the Price List Version, when the Price List version has been submitted, modified and approved and the Proposal and Approval Comment.

Master Document

The Master Document area is available only if enabled from the Overview area of the Contract Settings page.

The Master Document area allows the Buyer to manage and to record information about the Contract Master Document.

The Buyer Organisation may configure Contract to negotiate Master Document with Main Contractor; in case, Main Contractor is asked to Accept or Decline the Proposal sent by buyer. If allowed, Main Contractor may send a Counter Proposal to Buyer.

Viewing Master Document

Master Document on a Contract is normally visible to the Main Contractor during negotiation or after Contract activation.

Main Contractor can download the Master Document and access some important information as the status of the Master Document, when the Master Document has been uploaded, submitted and approved and the Proposal and Comment.

Contract Always Open

Definition

Specific areas of functionality are always available to Suppliers on every Contract:

- Messages: Allows Suppliers to communicate with the Buyer during and after the Contract lifecycle.
- User Rights: Allows the Supplier to manage the Right of Users to access the Contract.

Messages

A secure Messages area allows Suppliers to communicate with the Buyer during and after the Contract lifecycle.

The Messages area allows Suppliers to easily contact the Buyer with any queries about the Contract, and provides a complete audit trail of all communications between the parties during the Contract lifecycle.

The Received, Sent, Draft and Forwarded Messages pages display all Messages related to the Contract.

The Messages functionality should be used as the sole means of communication with the Buyer on issues related to the Contract lifecycle.

Messages on the platform are not emails, and Suppliers must first login to the platform in order to read and send Messages. Suppliers will receive an email Alert informing them of each new Message Received.

Contract Messages are managed using the standard Messages functionality.

User Rights

The User Rights area displays a list of all Supplier User accounts on the platform with the general User Right to "View Contracts".

The Supplier may edit the list in order to assign permission for each User to access to the current Contract. Users assigned permission to access the Contract will receive an email Alert, requesting that they login to the platform and access the Contract.

The Rights of individual User accounts to perform specific tasks on the Contract, and on other objects within the platform, are managed from the User Management area.

Published Opportunities module

The Opportunities module allows registered and prospective Supplier Organisations to browse a list of Opportunities published by the Buyer Organisation, and to express their interest in any PQQs/ITTs Open to All Suppliers within a specific Project.

- [Published Opportunities](#)

Published Opportunities

Definition

The Published Opportunities module allows a Supplier Organisation to view public information and documents related to a Project in order to decide whether or not to participate.
If the Buyer Organisation has chosen to publish an Opportunity, it is displayed both on the public homepages of the platform and, to logged-in users, within the Published Opportunities module.

Opportunity contents may include standard information such as the Opportunity description, the Listing Deadline, and additional details related to the Work Category and Procurement Route of the Project.

Published Opportunities are displayed in the following lists:

•   Current Opportunities: Displays Opportunities where the Listing Deadline has yet not been reached.

•   Past Opportunities: Displays Opportunities where the Listing Deadline is past .

Each Published Opportunity may include the following sections:

   •   Project Details
   •   Opportunity Details
   •   Buyer Details
   •   Published Lots
   •   Opportunity Attachments

Project Details

Each Opportunity is associated to a specific Project, and includes Project Details such as the Project Code and the Project Title, the Project Type together with information about the Project Category.

Opportunity Details

Opportunity Details include the Description and the Listing Deadline and, if configured, information about the Procurement Route, Work Category and Contract Details. Further information may be available, according to the

Opportunity Type selected by the Buyer Organisation, displaying related Additional Information fields grouped into sections.

Buyer Details

The Buyer Organisation Details section displays information about the Buyer Organisation who has Published the Opportunity, including the Organisation Name, the Buyer email address and an optional web link.

Published Lots

The Published Lots section displays a list of any PQQs/ITTs Open to All Suppliers that are linked to that Opportunity.
Suppliers may view a Summary of each PQQ/ITT, and decide whether or not to make an Expression of Interest.
Published Notices
Displays all Notices published within the same Project as the Opportunity.

Opportunity Attachments

A Published Opportunity may include file attachments, related to that Opportunity, available for download by Suppliers.

Activities

Viewing a Published Opportunity

A Supplier Organisation has different ways to view a Published Opportunity:

• By receiving an email Alert confirming that a new Opportunity has been published or an existing one has been amended; this Alert allows direct access to the Opportunity through a hyperlink;

• Once logged in, by accessing the Main Page in the published Opportunities area, where both Current and Past Opportunities are immediately available;

• Once logged and having selected the Project area, accessing the Project Details section, and following any related Warning Message link, providing the possibility to make an Expression of Interest in one or more PQQ/ITT Open to All Suppliers included in the Project. In this case a Supplier may view the Opportunity Details and any related Notice, by clicking the "View Published Opportunities" button.

Searching for an Opportunity

Users are able to search for a Published Opportunity by different criteria, referring to specific Project fields or by a specific Procurement Route or Work Category if configured, or by any additional information included in the Project. The search results may also be exported in MS Excel format.

Users & Organisation Profile module

The Users & Organisation Profile module allows a Supplier Organisation to manage its Profile on the platform, and to create and manage User accounts for Users within the Organisation. The Supplier Organisation may also view Evaluations performed by the Buyer Organisation regarding them and respond to Supplier Surveys in the Scorecards area.

Individual Users may manage their own account Details, and set their own account Password.

- Profile
  - Registration Data
  - Basic and Extended Profiles
  - Questions
- User Management
  - Users
  - Roles
  - Divisions
- Categories
- Scorecards
  - In Progress Surveys
  - Qualification Scorecards
  - Enterprise Scorecards
  - Contract Scorecards

Profile

Definition

The Profile module allows a Supplier Organisation to manage the Organisation Details held on the platform, and allows any individual Users within the Organisation to manage their own User Details.

If Vendor Management is configured on the platform, the Buyer Organisation may require Suppliers to provide responses to a series of Profile Questions, collected through Basic and Extended Profile Forms.

Suppliers are required to respond to all mandatory Questions in the Basic and Extended Profiles, and to review and update their responses regularly in order to keep them current.

Profile Questions allow the Buyer Organisation to learn more about the community of Suppliers registered on the platform. The same Profile Questions may be used in PQQs/ITTs, where Supplier responses to the PQQ/ITT are pre-populated from the responses given in the Basic and Extended Profile Forms.

The Profile area allows authorised Users to manage the following pages:

- Status Summary: The Status Summary page allows a Supplier to easily check whether all mandatory Profile Questions have been answered.
- Registration Data: Allows the Supplier Organisation, and individual Users, to view and manage their account on the platform.
- Basic and Extended Profiles: Basic and Extended Profiles allow a Supplier to respond to Profile Questions organised into structured Forms.
- Questions: A complete list of all Profile Questions, including details of the current Supplier response, allows the Supplier to quickly verify the current response to any Question.

Note:

Suppliers may easily view and print or export to PDF their Supplier Profile at any time. The complete Supplier Profile includes all the information recorded in the Profile pages.

Activities

Managing Profile Data

If Vendor Management is configured on the platform, Supplier Organisations are requested to provide their responses to Basic and Extended Profile Questions, and to ensure that responses are always up to date.

Even if Vendor Management is not configured on the platform it is essential that all Supplier Organisations maintain their own Registration Data on the platform and keep it up to date.

The User Details page allows each individual User to update their contact details as required.
All emails from the platform will be sent to the contact Email Address specified in the User Details page.
Additionally, the Market Operations Centre may need to use the information in the User Details page to contact a User during a procurement exercise.

Each User may specify a preferred Language and Time-Zone to be displayed on the platform. The platform uses this information to manage the Language in which pages are displayed to the User, and to manage the Date and Time displayed to the User in pages and in email alerts.
Note:

Users are requested to not make multiple registrations on the platform.

Additional User accounts for colleagues may be created within the User Management area if required.

Registration Data

Definition

The Registration Data page allows a Supplier Organisation to manage the Organisation Details held on the platform, and allows any individual Users within the Organisation to manage their own User Details.

Organisation Details

Organisation Details are the details of an Organisation that were originally provided during the Registration process. Organisation Details include the Organisation Legal Name, contact details, Legal Status, VAT and Fiscal Codes.

Organisation Details are only accessible to the User who originally created the Organisation's account on the platform (known as the Superuser), or to other Users specifically delegated by the Superuser.

A Superuser may manage the Organisation Details on the platform, ensuring that the information is always correct and up to date.

User Details

User Details are the details of each individual User within an Organisation.

User Details include security information such as the unique account Username and Password to access the platform, contact information such as the User's contact name, email address and phone numbers, and platform settings such as the User's Division and Role within the Organisation, and the User's preferred Language and Time-Zone.

The User Details page allows each individual User to view and manage important information about their User account on the platform.

Changing Password

It is essential that all Users maintain the security of their individual User account on the platform.

User accounts on the platform may be used to participate in sourcing activities and to form legal contracts with the Buyer Organisation.

Users are required to change their Password regularly to ensure that all User accounts on the platform remain secure.

The Password for each User account may be changed at any time from within the Modify Password page of the User Details area.

The intervals at which Passwords must be changed may vary from platform to platform.

Each time the Password is changed the Platform will send a confirmatory email to the contact email address entered in the User Details page.

If any User receives an email confirming that their Password has been changed, but the User does not remember having changed the Password, then the security of the Users account may have been compromised.

Note:

The Market Operations Centre must be contacted immediately if it is suspected that the security of any account has been compromised.

In addition to the Username and Password, each User account includes a Verification question and answer.

The Verification question and answer allow the Market Operations Centre to verify the identity of any User who contacts them, by requiring the User to provide the correct answer to the Verification question.

Basic and Extended Profiles

Definition

If Vendor Management is configured on the platform, Profile Forms may be presented to Suppliers during or after the Registration process.

The Forms area contains Questions set by the Buyer Organisation to gather basic and more extensive information about the Supplier Organisation. In the Supplier Profile area each set of Forms is displayed in a dedicated area which presents a list of the Forms along with data regarding completion status of Questions in the Form, Expiry Date information and when the Form was last modified.

The Forms are listed in the order in which they are presented to the Supplier but can be accessed in any order from these lists and navigation between the forms is easily performed from within any Form.

Basic Profile

The Supplier Basic Profile is the name given to the set of Forms presented to the Supplier Organisation during the Registration process.

Buyers typically use the Basic Profile to gather essential Supplier Data not covered by the Registration Data.

Managing Basic Profile Responses

In order to complete the Basic Profile, the Supplier should enter a response for each mandatory Question (indicated by a red asterisk) during the initial registration process.

Responses to Basic Profile Questions may be edited at any time after registration by amending the contents of the Basic Profile Forms.

Details of all Questions and responses from the Basic Profile Forms may be viewed from the Questions page.

Extended Profile

The Supplier Extended Profile is the name given to the set of Forms presented to the Supplier Organisation after the Registration process.

Buyers typically use the Extended Profile to gather Supplier Data for Pre-Qualification purposes.

Managing Extended Profile Responses

In order to complete the Extended Profile, the Supplier should enter a response for each mandatory Question (indicated by a red asterisk) at any time after the registration process.

Responses to Extended Profile Questions must be provided by responding to the Extended Profile Forms.

Details of all Questions and responses from the Extended Profile Forms may be viewed from the Questions page.

Questions

Definition

If Vendor Management is configured on the platform, Profile Questions may be presented to Suppliers either during the Registration process, or in Category specific forms, or included in PQQ/ITT Questionnaires.

Each Profile Question may appear in several different Forms or PQQs/ITTs. However a Supplier Organisation may only provide one confirmed response to each Question at any point in time.

In the event that a Supplier provides different responses to a Question, for example between the Basic Profile and a PQQ/ITT Questionnaire, the latest response visible to the Buyer will take precedence. So for example, if an Organisation responds to a Question in the Basic profile at Registration, but then submits an updated response on a subsequent PQQ/ITT, the response to the PQQ/ITT will take precedence and will be applied back to the Basic Profile. The latest response is applied back to the Profile at the point when it becomes "confirmed". In the case of responses provided on PQQs/ITTs, the response is confirmed by being viewed by the Buyer.

The Questions page displays a list of all the Questions that have been viewed by the Supplier Organisation.
It is possible to search for Questions by the Form where it is displayed, by Type (e.g. Numeric, Date, Yes/No), by Title and by Date Last Modified.

Searching for Questions

The Questions page displays a list of all the Questions that have been viewed by the Supplier Organisation.
It is possible to search for Questions by the details in the Question list, and by the Form where it is displayed.

The Questions list displays the following information for each Question:

- Label: Title of the Question as specified by the Buyer.
- Type: Type of Question (i.e. response format, for example: Date, Attachment; Yes/No; Option List; Multiple Choice Option List; Numeric; Text).
- Date Last Modified: The Date and Time the Supplier Organisation last responded to the Question.
- Date Last Confirmed: The Date and Time at which the latest response to the Question was saved to the Supplier Profile.
- Confirmed In: The area of the platform in which the Supplier Organisation last responded to the Question (e.g. Basic Profile, Category Form, PQQ/ITT).

- Response: The Supplier Organisations current response to the Question.

Viewing Responses to Questions

Each individual Question may be viewed in a separate Question Details page.

The Question Details page shows information about the Question, and about the current Response to the Question from the Supplier Organisation.

The page allows the Supplier Organisation to check the current response to the Question, to verify the identity of the User who last provided the response, and the area of the platform in which the response was provided.

The page also allows a Supplier Organisation to identify the Basic and Extended Profile Forms, and the Category Forms, in which the Question occurs.

User Management

Definition

The User Management area allows a Superuser to create and manage a hierarchy of User accounts on the platform.

User accounts allow a Superuser to share access to the platform with other individuals in their Organisation, and to manage the Rights of those Users to perform specific tasks.

Roles allow the Superuser to configure sets of User Rights on the platform, allowing all User accounts assigned with a given Role to perform only the specific tasks that have been assigned to that Role. Each Role may be unique to a Division, or it may be "Shared" across all Divisions of the Organisation. The Rights of individual User accounts may be manually varied from the Rights of the assigned Role, and may subsequently be reset to match the Rights of the assigned Role.

Divisions allow the structure of an Organisation to be properly replicated within the platform. User accounts may be assigned to Divisions, allowing the visibility of activities on the platform to be managed by Division, and allowing activities on the platform to be reported by Division. Each Division must include a Division Manager.

The User Management area allows authorised Users to manage the following objects:
- Users
- Roles
- Divisions
- Default User: Allows the Superuser to nominate specific User accounts to receive all email alerts related to PQQ/ITT and Auctions to which the Organisation is invited, and to manage participation in those objects on behalf of the Organisation.

Activities

Creating a User

Any User with Rights for User Setup and Management may create a User from within the Users list.

The creation of a new User account involves the completion of the User Details page.

The User creating the new account must specify the correct contact email address for the new User, select a unique Username, and assign a Division and Role if required.

If no Role is assigned then the User Rights of the new User must be manually configured by the creator in order for the new account to be able to perform any tasks on the platform.

Each new User account will receive a confirmatory email, verifying the account Username and Password. The platform will send email alerts to the contact email address specified in the User Details page.

Creating a Role

Any User with Rights for User Setup and Management may create a Role from within the Roles list.

Each Role must be given a Title, and may be designated as "Shared" across all Divisions.

In order that User accounts with the Role are able to perform the required tasks the creator of the Role must assign the required User Rights for each module within the platform to the Role.

Any User accounts that are subsequently assigned with the Role will inherit the identical User Rights.

Creating a Division

Any User with Rights for User Setup and Management may create a Division from within the Divisions list.

Each Division must be given a Name, and a User account must be specified to act as the Division Manager.

Users

Definition

A User is an account that has been created within an Organisation by a Superuser.

User accounts allow a Superuser to share access to the platform with other individuals in their Organisation, and to manage the User Rights of those individuals to perform specific tasks.

The Users list allows a Superuser (or any User delegated with Rights for User Setup and Management) to view and manage existing User accounts on the platform.

Each User account is managed from the following areas:
- User Details
- User Rights

User Details

The User Details page displays the information used to create the specific User account.
User Details include the Users First & Last Name, contact details, a unique Username, and may include a Division and Role.

Managing User Details

The information in the User Details page may be modified by a Superuser or by any other User delegated with Rights for User Setup and Management.

Changes to the Division of the User may have an impact on the visibility of objects to the User, depending on the visibility of the Division. A change of Division may also require a new Role to be assigned to the User, in cases where the currently assigned Role is unique to the original Division.
Changes to the Role of a User may have an impact on the visibility of existing objects to the User, and the Users Rights on existing objects.

Individual Users are able to view their own User Details within the Profile pages, and to update selected fields such as their contact information and Language & Time-Zone preferences.

User Rights

The User Rights page displays the Rights assigned to the User account on the platform.

Rights are presented by object (for example PQQ/ITT, Auction, Contract) and by module.

The User Rights assigned for an individual User on a specific object may vary from the Rights displayed in the User Rights page. Objects containing variations from the Rights assigned in the User Rights page are indicated in the Verification pages.

Each User Right is defined by the following settings:

Setting	Definition
No	User does not have the Right.
Yes	User does have the Right in all objects.
Yes (Mine)	User does have the Right in all objects assigned to them.

Managing User Rights

The User Rights page allows a Superuser, or any other User delegated with Rights for User Setup and Management, to assign Rights for the User to perform specific tasks on the platform.

User Rights are assigned by editing the User Rights page to select the required setting for each Right.

Roles

Definition

A Role is a saved set of User Rights on the platform.

Roles allow a Superuser to quickly and easily assign the appropriate User Rights to User accounts, according to the function of the User within the Organisation.

Each Role may be unique to a Division, or it may be "Shared" across all Divisions of the Organisation.

User accounts assigned with a Role automatically inherit the User Rights associated to the Role.

Changes to the Role User Rights are automatically applied to all Users with the Role, allowing the Superuser to quickly deploy changes to User Rights across the Organisation.

The Rights of individual User accounts may be manually varied from the Rights of the assigned Role.

Each Role is managed from the following areas:

- User Rights
- Verification

User Rights

The Role User Rights page functions in the same way as the individual User Rights page.

Rights are presented according to object and module, and are defined by selecting from a range of available settings for each Right.

Managing Role User Rights

If the User has been assigned a Role within the User Details page, the User Rights of the Role are inherited by the User. The Superuser may subsequently modify the individuals User Rights, so that they differ from those of the assigned Role. In this case the Role column of the User list will display the symbols <> for the specific User.

Any modifications to the User Rights associated to a Role will be applied to all Users with that Role, and will cause any deviations from the Role User Rights to be removed in the User Rights page.

Verification

The Role Verification area displays a list of all variations to individual Users Rights on accounts with the current Role. Verification pages allow a Superuser to easily identify situations where individual User accounts may require a different Role.

Divisions

Definition

A Division is a grouping of User accounts within an Organisation on the platform.

All User accounts within the platform must be assigned to a Division. A Division named "Division" is created by default, and all new User accounts will be added to this Division until assigned to another Division.
Each Division must include a Division Manager.

A Division may have unique Roles associated to it, allowing tasks on the platform to be allocated differently according to the Division within the Organisation.

Additionally the Visibility of a Division to Users from other Divisions may be managed, allowing Users in a Division to see only those Projects which are relevant to their own activities.

The Divisions area allows a Superuser to create, view and manage all Divisions within the Organisation.

Each Division is managed from the following areas:
- Division Details
- Division Users
- Division Visibility
- Departments
- Verification

Division Details

The Division Details page allows a Superuser to manage the Name of the Division and to assign the position of Division Manager.

Division Users

The Division Users page displays a list of all User accounts assigned to the current Division, including the Role assigned to each User.

Division Visibility

The Division Visibility page allows a Superuser to manage the Visibility of the Users and Projects from the current Division to Users from other Divisions in the Organisation.

Division Visibility is useful to ensure that Users are only able to access Projects that are directly relevant to their own activities, and to specifically prevent Users having visibility of sensitive Projects.

Departments

A Department is a unit within a Division. Users within a Division may be associated to a Department from the User Details page.

Verification

The Verification page displays a list of Users with any User Rights that exceed those of the Division Manager, allowing a Division Manager or Superuser to verify that all Users within a Division are operating beyond the responsibility of the Division Manager.

Categories

Definition

The Categories area is only available to Users with Superuser status and displays a list of the product Categories associated to the Supplier Organisation. If Vendor Management is activated on the platform, the Buyer may require each Supplier to complete Forms of Profile Questions related to each Category.

Each Supplier Organisation should declare the Categories in which it is able to supply the Buyer, and complete any Category Forms where these are presented.

The Category data entered in this area enables the Supplier Organisation to be selected for invitation to future sourcing Projects.

Category Tree

The Category Tree represents a hierarchy of the various types of goods and services sourced by the Buyer Organisation.

The Categories area allows the Supplier Organisation to select and maintain a list of Categories and Sub-categories. Buyers may also require the Supplier to complete a Form to provide additional information specific to each of the Categories that are selected.

Goods and services are organised into multiple levels of Categories and sub-categories.

Current Categories

The Current Categories page displays a list of all Categories of supply selected by a Supplier Organisation.

Activities

Selecting Categories of Supply

Suppliers may select categories of supply by searching or browsing the Category Tree. Suppliers may select any "leaf" on the Category Tree, in order to propose themselves to the Buyer as a potential Supplier in that Category.

Managing Categories of Supply

Selected categories of supply are listed in the Current Categories page. Suppliers may view each Current Category in order to review the Category Form (if present) or to remove the selected category from their Profile.

Completing Category Forms

Category Forms are composed of Profile Questions related specifically to a category of supply.

Suppliers are automatically presented with any applicable Category Forms when selecting new categories from the Category Tree.

The completion status of each category Form (if present) is indicated on the list of Current Categories. Suppliers may view each Current Category in order to edit the responses to the Category Form.

Responses to Category Form Questions may be viewed from the Questions page, which lists all the Profile Questions ever presented to the Supplier Organisation.

Scorecards

Definition

If Vendor Relationship Management is configured on the platform, Supplier Users may be granted access to the Scorecards area.

The Scorecards area provides the Supplier Organisation with access to view the completed Evaluations which the Buyer Organisation has conducted regarding their overall performance and their performance in Qualification Records and Contracts.

In this area the Supplier may also be asked to participate in the Evaluation process by being requested to complete a Supplier Survey to provide up-to-date responses to data used by the Buyer Organisation in a Scorecard Evaluation.

In Progress Surveys

A Survey is a form issued by the Buyer Organisation to the Supplier containing Questions that will be used in a Scorecard Evaluation. The Survey allows the Supplier to provide any missing data, update responses which have previously been provided in platform activities or confirm the data which is held for the Questions. When a Survey is sent to a Supplier, they are notified by an Alert. Access to individual Users within the Organisation can be managed with specific User Rights.

Qualification Scorecards

The Qualification Scorecards list allows the Supplier to view completed Evaluations performed by the Buyer Organisation based on Qualification Records created regarding the Supplier's Classification activities on the platform. A Qualification Scorecard shows details of the last and previous Evaluations, including the Form used to perform the Evaluation. In the Form, Supplier Performance is assessed against Key Performance Indicators (KPIs) which are scored to provide a Total Score per Evaluation.

Enterprise Scorecards

The Enterprise Scorecard area allows the Supplier to view completed Evaluations performed by the Buyer Organisation based on the Supplier Organisation's overall performance in platform sourcing activities. The Enterprise Scorecard shows details of the last and previous Evaluations, including the Form used to perform the

Evaluation. In the Form, overall Supplier Performance is assessed against Key Performance Indicators (KPIs) which are scored to provide a Total Score per Evaluation.

Contract Scorecards

The Contract Scorecards list allows the Supplier to view completed Evaluations performed by the Buyer Organisation based on individual Contracts that the Supplier has been awarded. A Contract Scorecard shows details of the last and previous Evaluations, including the Form used to perform the Evaluation. In the Form, overall Supplier Performance is assessed against Key Performance Indicators (KPIs) which are scored to provide a Total Score per Evaluation.

File Sharing module

The File Sharing module allows Buyers and Suppliers to share files in a structured and secure manner.

- Directories
  - Directory Folders & Files
  - Directory Settings
  - Folder Properties
  - File Properties

Directories

Definition

File Sharing Directories allow a Buyer Organisation to share a structured system of Folders and Files within the Organisation, with other Buyer Organisations, and with registered Suppliers.

Individual Buyers and Suppliers may be granted access to each Directory according to the Directory Settings, with specific User Rights being managed by the Directory Owner.

File Sharing offers a powerful search engine to find a specific File or Folder according to multiple criteria, enabling Users to easily find any File or Folder within the Directory structure.

Directories offer Folder and File management features such as File uploading, Folder and File copy and paste, and Folder and File deletion.

File version management, with File check-out and check-in, allow changes on each File to be managed collaboratively and tracked over time. Directories also facilitate collaborative File management by providing a secure Messaging function at File level.

Typical activities within Directories are restricted by User Rights, and may include the ability to:
- Browse the list of Directories, and manage Folders and Files;
- Search within Directories using multiple search criteria, with the possibility to export details or to download Directory contents;
- Monitor Files by viewing previous Versions of a File.

File Sharing may be managed through the following areas on each Directory:
- Directory Folders & Files
- Directory Settings
- Folder Properties
- File Properties

Activities

Searching for Directory Contents

Users looking for a specific File or Folder may search Directory contents using the Search area.

Searches may be performed according to different criteria:

- by Directory

- by type of Folder, once a specific Directory is selected.

- by Text related to File Name, Description and Comments on the last version

- by Organisation, User, Directory Owner (created by, modified by)

- by Dates (e.g.last modification date, checked-out date)

- by File Status

All Files and Folders matching the search criteria are listed in a page that also provides the path where Files/Folders are located, and links directly to the relevant Files/Folders list.

Directory Folders & Files

Definition

The Directory Folders and Files list displays the entire contents of each Directory.

The list displays all Folders and Files, providing information such the number of Files contained in each Folder, a Description of the Folder/File, the last modification date, Size, File status and a link to the Folder/File Properties. Drilling down into the Folders and Files list allows each Folder or File to be viewed and managed according to the specific Directory Settings.

The following options are available on each Folders and Files list:

- Upload a new File or a new version of a File
- Create a new Folder or to add it within existing Folders
- Copy all Folders and Files

A User may search and filter the Directory contents, Mass Download the entire contents of the Directory, or export details of the contents in MS Excel format.

Activities

Viewing Folder Contents

Folder contents may be easily viewed by drilling down into each Directory to browse and review its contents.

The path to the Users current location in the Directory structure is always displayed, allowing Users to easily navigate around the Directory Folder structure.

Alternatively, a User may perform a Search across the contents of any Directory.

Uploading Files

A User may attach a new File into a Folder by browsing and selecting a File (or multiple Files) to upload from their computer.

Attached Files are saved in Available status by default, allowing uploaded Files to be available for immediate editing by colleagues.

The maximum File size on the platform is 50Mb, and it is recommended that each attachment to be shared should be not more than 2Mb.

Attached Files may be managed by editing the individual File Properties.

Creating Folders

A User may add new Folders to the Directory root and/or to add new Folders within existing Folders of the Directory.

Folder creation follows the Folder Type Management rules of the Directory:

- If the User creates a new Folder in a Directory where Folder Type Management is not active, no Folder Type needs to be selected;

- If the User creates a new Folder in a Directory where Folder Type Management is active, there are two possibilities according to the Folder Type selected:

- If the User creates a new Folder and selects the Folder Type as "not categorised", on each new sub-Folder created within that Folder, the Type selection is free.

- If the User creates a new Folder and selects the Folder Type as anything other than "not categorised", on each new sub-Folder created within that Folder, the Type selection is not possible because it is populated with the setting from the parent Folder.

Copying Files and Folders

The Copy action allows a User to duplicate the whole Directory, copying its structure and/or individual Folders and Files, between different Directories or between different areas of the platform. For example a Supplier may copy a Folder and Paste the Folder into another Directory on the platform.

The Paste action allows the User to decide what copied contents should be pasted into the destination. The User must specify whether they wish to:

- Paste only the copied Folder's structure,

- Paste all Files from the copied Folder,

- Paste both the copied Folder's structure and all Files from the copied Folder.

Directory Settings

Definition

Directory Settings allow the Buyer to manage the behaviour of the Directory contents, and to provide access to the Directory contents for Buyers and Suppliers.

Directory Settings may be managed from the following areas:

- Settings: Allows the Buyer to manage the behaviour of the Directory contents, and to specify if Buyers and/or Suppliers may be allowed to access the Directory.

Settings

Directory Settings are defined by the Directory Owner and specify which features are enabled on the Directory, and how those features should behave.

Specific Directory Settings include the following:

- Enable File Messages: Allows Users invited to a specific Directory to manage Messages related to one or more Files belonging to that Directory.
- Enable File Version Management: Allows tracking of each saved version of a File. File version control allows previous versions to be viewed by Users with sufficient Rights. If File version control is active, the File Properties (Buyer) of each File includes a Previous File Version Area to view and manage all previously saved File versions.
- Enable File Approval Management: Allows management of a File Approval workflow involving the option to select and create an Approval List and manage File Approval status.
- Enable Folder Type Management: Allows Directory Owners to structure Directory contents using different type of Folders associated to specific Buyer and Supplier User Rights.

Folder Properties

Definition

The Folder Properties page provides a summary of each Folder within the Directory, including information about the Folder Type (if configured), the Total File Size of the Files within the Folder, and the dates and times of the last actions performed on the Folder.

Folder Details

The following Folder Properties may be edited at any time by Users with sufficient User Rights:

- Folder Title and Description
- Folder Type, if configured, allows the User to change the Folder Type selection and to automatically assign the User Rights related to the Folder Type.

Selecting a Folder Type of "not categorised" has the effect of allowing each subfolder within the Folder to be manually assigned with any available Folder Type.

Selecting any other Folder Type has the effect of causing each subfolder within the Folder to automatically inherit the selected Folder Type.

Different Folder Types may be associated to different User Rights, and may be configured by the Directory Owner.

It is also possible to:

- Delete a Folder and all its contents: in order to do this, Users must proceed first to delete or move the Files contained inside the Folder.
- Copy the entire structure of the Folder and all linked subfolders, and to Paste the content into a destination area such as another Folder or Directory.

File Properties

Definition

The File Properties page provides Buyers and Suppliers with information related to each individual File in a Directory.

File Properties may be managed from the following areas:

- File Details

- Previous File Versions

- Messages

File Details

The File Details area displays information related to the File Status, indicating if the File is Available to be downloaded or modified, together with details of the Actions performed on the File, possible electronic signature validation at uploading, and a record of all downloading of the File.

Actions available in this area may change according to the File Status, and the Settings and the User Rights of the Directory.

Assuming that a User associated to a Directory has all User Rights enabled, a File with Available status may be subject to the following actions by the User:

- Checkout: Prevents File modifications by all Users except the individual User having Checked-out the file. Once modifications are finished the User has two options: if the User is ready to share the File modifications the User can upload a new version and make the File available for editing by using the Check-in action. Alternatively, the User may cancel the Check-out action. Cancelling the Check-out means that the file is available to be modified by other Users.

- Upload a new version: Allows a new version of a File to be uploaded; if the File is Checked-out for editing, a User may upload a new version only if they have the Check-Out Erase User Right.

- Freeze: Freezing a File prevents all other actions on the File, such as the editing of File Properties, uploading of new versions, File Check-in/Check-out, or File deletion.

Previous File Versions

The Previous File Versions area is displayed only if File Version Management is active on the Directory.

The page displays a list of all previous versions of the File, allowing Users to retrieve a previous version if required.

File versions may be deleted by authorised Users. Deleted File versions are not saved on the platform, but it is possible to view details of the versions and their deletion from the list of Actions performed on the File.

Messages

The Messages area must be enabled on the Directory Settings and allows Users to send and receive secure Messages related to a specific File.

Since Messages are intended to compliment the File Management features of the File Sharing module, File Messages may not contain any Attachments.

Only those Buyers and/or Suppliers, invited to the Directory may send and receive Messages on a File:

- If a Message sender or recipient is an invited Supplier then the Message is available to all Users in the Supplier Organisation with access to the Directory.

- If a Message sender or recipient is an invited Buyer, either as a single Buyer, or at Division level or at Buyer Organisation level, then the Buyer must decide which "mailbox" to use. The Buyer may send Messages at either single Buyer, or at Division level or at Buyer Organisation level.

Reading of Messages sent to Buyers is tracked at single Buyer level.

In the event that a File is deleted from the Directory, all related Messages are also deleted from the platform.

Links to other modules

Depending on the platform configuration, and on individual's Users Rights, the Module Selector may be used to access the following areas:

- The page used to select the platform Language (Available to all Users).

Common Features

Definition

Several standard functionalities are available to Suppliers across all the modules within the platform.
The behaviours of these common features are explained in this page.

Object Lists

Objects within the platform, such as PQQs and ITTs, are presented to the User in lists. Object Details, such as Settings and Attachments, are normally accessed by clicking upon any Object within these lists.
The number of objects displayed in each list may be easily managed by the User for improved usability, and the contents of each list may be exported in Microsoft Excel format for viewing offline.

Users may Search or Filter the object lists in order to view one specific object, or to view a subset of objects.
The platform provides a set of Standard Filters allowing the User to quickly and easily find the most common subsets of objects. Examples of Standard Filters in the PQQ/ITT lists include Recently Viewed PQQ/ITT and Running PQQ/ITT.
The Search function allows the User to configure searches for objects, using fields from the object Details or from the Project containing the objects, as criteria. As additional criteria, Users may normally filter objects according to the object Status, and by the contents of any Additional Information fields saved on the object.

Messages

The platform provides a Messages feature, allowing Suppliers and Buyers to communicate securely.
Messages on the platform are not like emails. Message recipients will receive an email alert, telling them that a new Message has been received on the platform. But the recipient must login to the platform, and browse to the new Message, in order to view its contents. This is a security feature designed to ensure that only authorised users can view the contents of Messages. The platform records the content of every Message, and the date & time at which a Message has been read by each recipient. On a PQQ/ITT, Auction or Contract, Messages are able to provide a complete audit trail of the communications between the Supplier and the Buyer during the sourcing process.
Messages are divided into 4 lists:

- Received Messages: Displays any Messages that have been received from the Buyer on the current object. The number of Messages which the User personally has not read will be displayed in parenthesis.
- Sent Messages: Displays any Messages sent to the Buyer on the current object.
- Draft Messages: Displays any Messages on the current object that have been created and saved, but are not yet sent.
- Forwarded Messages: Displays any Messages that have been forwarded to email recipients outside the platform from the current object.

Within the Messages area a User may create a new Message, search for Messages, print a Message or Message list, export the Message list to Excel, or view a complete report of all Messages in a list.

Messages may include file attachments, except on the Messages areas of files within the File sharing module.

Normally Messages may only be sent to the other party in a procurement process, for example from Buyer to Supplier, or from Supplier to Buyer. In order to protect Supplier confidentiality, Supplier to Supplier messaging is not available on the platform. The identity of Message recipients is never displayed by the platform to other recipients of the Message.

Attachment Lists

Attachments are any files that have been saved to the platform. Files may be attached to most objects within the platform, and are managed from attachment lists, which share the same features across all areas of the platform.

Files may be uploaded to the platform from a Users computer one file at a time. Alternatively, the platform provides a Java applet, allowing a User to select and upload multiple files from the computer in a single operation.

Each file attached on the platform has its own properties, such as a history of downloading. Files may be activated or deactivated by a Buyer, allowing the Buyer to prevent downloading of individual files by Suppliers.

The contents of an attachment list may be easily downloaded in a single operation using the Mass Download feature.

Mass Download

Mass Download is available from every Attachment list, and allows a User to download the entire structure of the Attachment list, including all folders and files, to a selected location on their own computer.

The Mass Download functionality uses a Java applet in order to facilitate easy downloading of Attachments from the platform.

Mass Download is particularly useful for downloading large numbers of files in a single operation. For example, a Supplier may use the Mass Download functionality to easily download all Buyer Attachments from a PQQ/ITT, avoiding the need to download each file individually.