MOFPS

MINISTRY OF FINANCE AND THE PUBLIC SERVICE

OFFICE OF PUBLIC PROCUREMENT POLICY

Government of Jamaica Electronic Procurement (GOJEP) User Manual (Procurement Officers)

This GOJEP User Guide provides technical instructions, to public procurement practitioners, related to the functionalities of the GOJEP portal.

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Acronyms / Abbreviations

Acronym / Abbreviations	Meaning
APP	Annual Procurement Plan
PE	Procuring Entity
CAPC	Contracting Authority (Procurement Entity) Procurement Coordinator
CAPCA	Contracting Authority (Procurement Entity) Procurement Coordinator Assistant
CAPO	Contracting Authority (Procurement Entity) Procurement Officer
CfT	Call for Tender
CPV	Common Procurement Vocabulary
ED	European Dynamics SA
e-PPS	European Dynamics electronic Public Procurement System
FA	Framework Agreement
JMD	Jamaican Dollar
ICB	International Competitive Bidding
ITB	Invitation to Bid
LCS	Least Cost Selection
MC	Mini Competition
MoF	Ministry of Finance
NCB	National Competitive Bidding
NCC	National Contracts Commission
OCG	Office of the Contractor General
PO/ES	Procurement Officer / Evaluation Staff (member of the evaluation committee)
PO/ESR	Procurement Officer / Evaluation Staff Responsible (leader of the evaluation committee)
PO/OS	Procurement Officer / Opening Staff (member of the tender opening committee)
PO/TC	Procurement Officer / Tender Coordinator (member of the coordination committee)
PAPU	Procurement and Asset Policy Unit
QBS	Qualification Based Selection
QCBS	Quality-Cost Based Selection
RB	Restricted Bidding
RFP	Request for Price
RFQ	Request for Quote
SA	System Administrator
SO	Supplier Organisation
SS	Single Source
TCC	Taxation Compliance Certificate
TRN	Tax Registration Number
US$	United States Dollar
XLS	Microsoft 2003 Excel Spreadsheet

1   Minimum and Recommended system requirements

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

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

2   General Functionality

2.1   General usage guidelines

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

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

#	Title		CA	Info	Tenders submission deadline	Procedure	Status	Notice PDF	Award date	Estimated total contract value	

Figure 1: Example of a table header

- The arrows are used for shorting (in ascending/descending order) the results by the corresponding field. The button is used to hide/ show a number of fields in the table.

- Any search query or list, with more than a page of results, will include the following navigation buttons:

Table 1: Pagination options

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

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

Table 2: Additional options

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

2.2 The Competition Menu functionality

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

Figure 2: The Competition Menu (collapsed)

If the user selects the Competition Menu, it will be expanded to show all available functionalities. The user can select any of the provided functionalities:
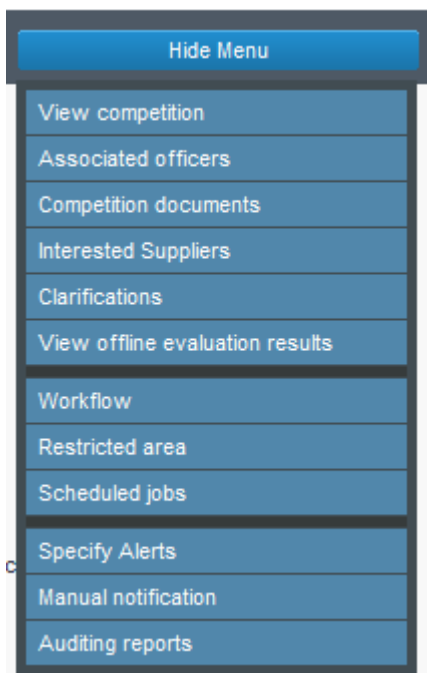
Figure 3: The Competition Menu (expanded)

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

2.3   Main Page

Figure 4: Main page

The main page of the e-GP system consists of the following elements:

- **Left column**, which contains the Login panel, General Information Panel, and Calendar Panel.

- **Central column,** which contains general information regarding the system, the Suppliers and the users of contracting authority. Furthermore, it lists any uploaded news and also statistical information about the system usage.

- **Constant functionality at the top** of the main page which contains functionalities which are available within all pages of e-GP.

- **Constant functionality at the bottom** of the main page which contains functionalities which are available within all pages of e-GP.

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

2.3.1   Login Section
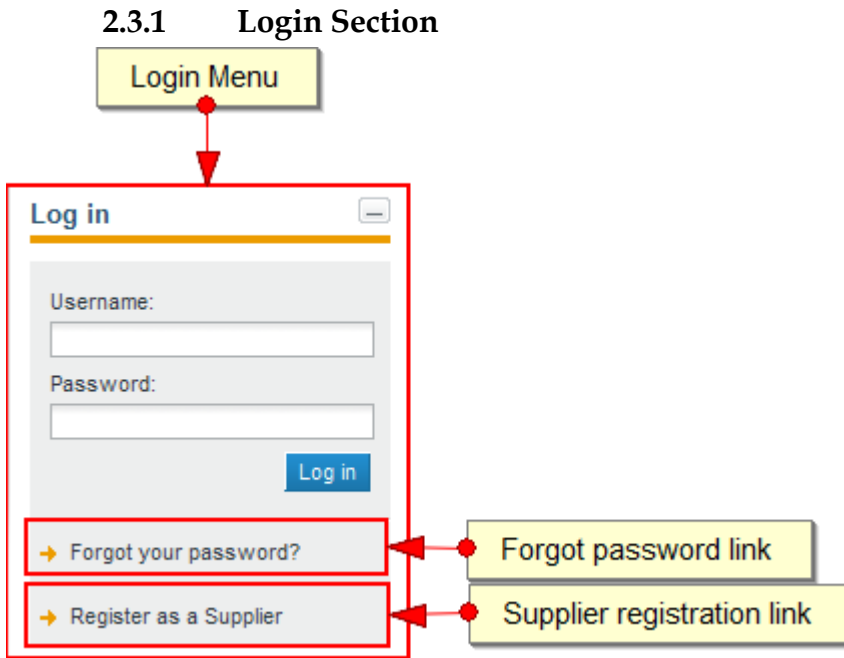
Figure 5: Login panel

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

2.3.2   Search Section
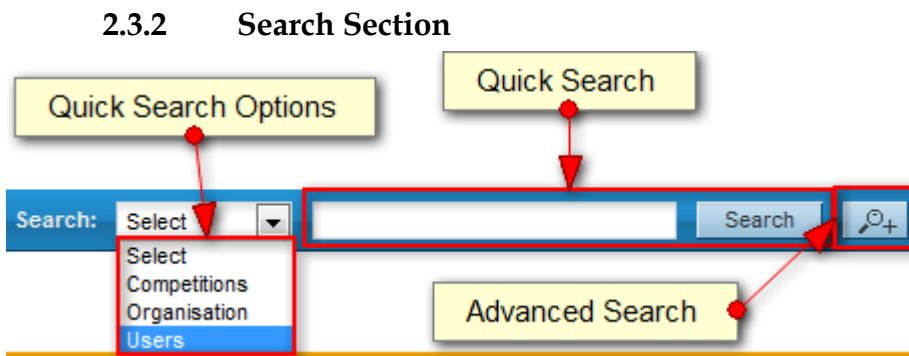
Figure 6: Search panel

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

2.4 Login in the system

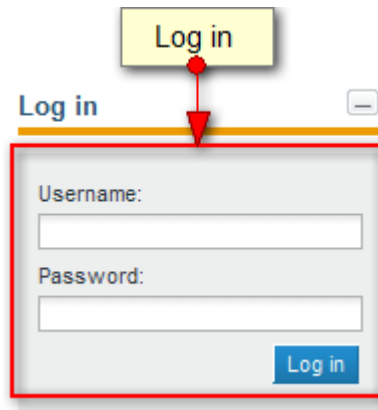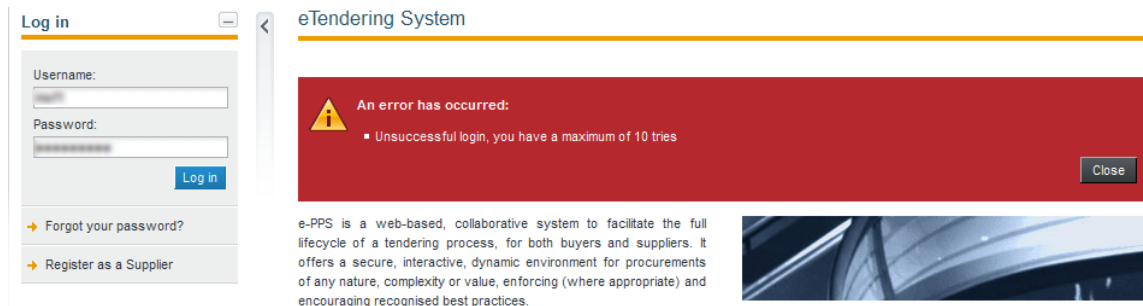All users of the e-GP module should have an appropriate user name and password. In order for a user to login in the system, he must provide his credentials in the login section of the main page:

Figure 7: User login

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

Figure 8: Wrong credentials

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

2.5 Login to the system for the first time

The following steps are available, when the user login to access the e-GP services for the first time.
As a first step, the user will have to provide the transaction number (which is received by email after his successful registration on the platform):

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

To verify your registration please follow this link to log in to theePPS:
[blurred link]

Your username is: [blurred]
Your registration transaction number is: 1078716813

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

You can directly access confirmation page by following link:
[blurred link]

DO NOT DELETE THIS
************************************************************************
IMPORTANT: All actions within the e-Tendering Platform will be recorded for auditing purposes.
This email and any files transmitted with it are confidential and intended solely for the use
of the individual or entity to whom they are addressed. If you have received this email in error
please notify theePPS manager. This message contains confidential information and is intended
only for the individual named. If you are not the named addressee you should not disseminate,
distribute or copy this e-mail. If you have received this e-mail by mistake delete this
e-mail from yourePPS. If you are not the intended recipient you are notified that disclosing,
copying, distributing or taking any action in reliance on the contents of this information
is strictly prohibited.

Please do not reply to this mail.

************************************************************************
```

Figure 9: Confirmation email received during registration.

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

Figure 10: The transaction number

Finally, the user is prompted to read and accept the following System User Agreement:

Figure 11: Confirmation of the user agreement

2.6 Logout from the platform

The user can exit the e-GP services by selecting the "**Logout**" functionality:
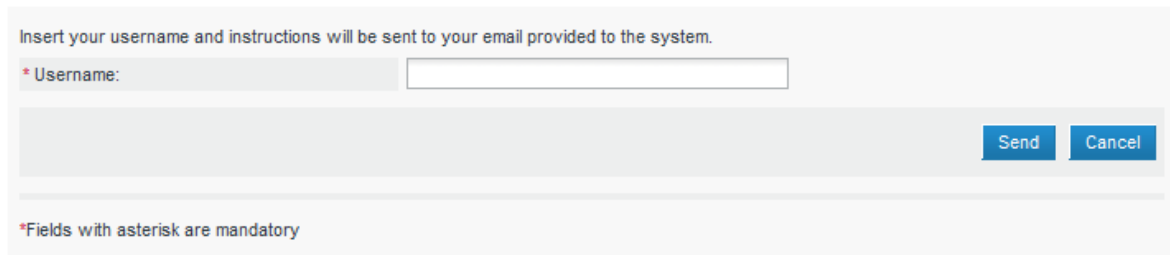

Figure 12: Logout functionality

2.7 Password recovery

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

Forgot your password?

Insert your username and instructions will be sent to your email provided to the system.

* Username: [   ]

[Send] [Cancel]

*Fields with asterisk are mandatory

Figure 13: Password recovery/change

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

```
ePPS - Password Reset Instructions

New password for user:       with full name

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

You can access the new password section through the following link:
                              'prepareResetPassword.

Your registration transaction number is: 1078716813

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

************************************************************************
IMPORTANT: All actions within the e-Tendering Platform will be recorded for auditing purposes.
This email and any files transmitted with it are confidential and intended solely for the use
of the individual or entity to whom they are addressed. If you have received this email in error
please notify theePPS manager. This message contains confidential information and is intended
only for the individual named. If you are not the named addressee you should not disseminate,
distribute or copy this e-mail. If you have received this e-mail by mistake delete this
e-mail from yourePPS. If you are not the intended recipient you are notified that disclosing,
copying, distributing or taking any action in reliance on the contents of this information
is strictly prohibited.

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

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

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

Figure 15: Resetting the password

2.8 Maintenance of user's profile

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

Figure 16: Edit User's Profile

The password should follow a specific configuration. To view the password rules the user should click on the link "**Password Rules**" (Figures Figure 16 and Figure 17). The password configuration rules consist of:

- Letters (upper case/lower case) allowed to be used
- Numbers allowed to be used
- Characters allowed to be used
- Allowed login failures
- Password lifetime
- Password length (min/max)
- Password history

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

Numbers	Select All
0	☑
1	☑
2	☑
3	☑
4	☑
5	☑
6	☑
7	☑
8	☑
9	☑
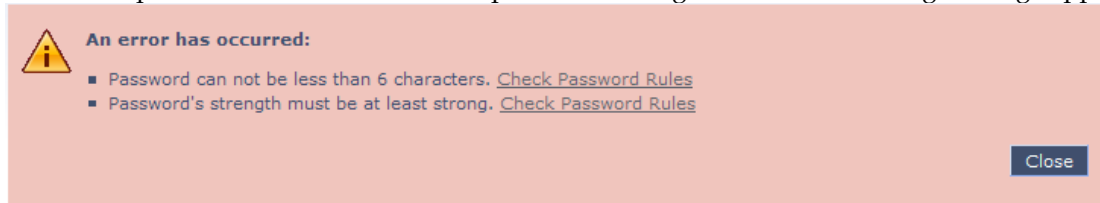
Other characters	Select All
!	☑
@	☑
#	☑
$	☑
I	☑

Allowed login failures	10
Password lifetime (in months)	Never
Password Min length	6
Password Max length	20
Password history Activate ○ Deactivate ●	
Password strength	weak

Figure 17: Password Configuration Rules

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

2.9 XLS file format support

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

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

2.10 XLS file upload validation

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

- Annual Procurement Plan XLS
- Consolidated Annual Procurement Plan XLS
- Evaluation Report XLS

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

3   Procuring Entity Management

The Users with a role of Contracting Authority (Procuring Entity) Procurement Coordinator can perform the following management activities for their Procuring Entity:

- Edit organisation details
- View the users registered within the procuring entity
- Add new users in the procuring entity
- Edit user's details

The Procuring Entity Management functionality is provided through the "**PE Management**" menu:
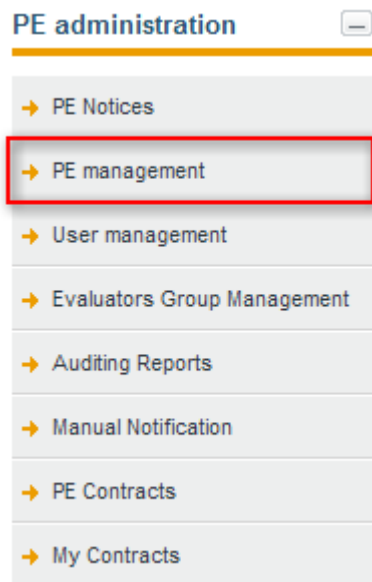
Figure 18: PE management menu

View organisation

| Edit organisation | View users | Add User | Template Library |

Organisation name :	Procuring Entity 5
Organisation abbreviation:	PE5
Address:	Kingston Str 12
Postal Code:	
City:	Kingston
Country:	Jamaica
Email:	c1jperri@eldna.eurodyn.com
Phone Number:	
Fax:	
Website:	
Status:	Active
Manage the APP:	No
Entity Level:	2
Parent entity:	Ministry of Education

Children Organisations

No results found.

| View all published notices |

Figure 19: Management of Procuring Entity Details

3.1 Edit organisation details

Selecting "**Edit Organisation**" allows the user to edit the organisation's details:

Figure 20: Editing Organisation details

3.2 View the users belonging to the procuring entity

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

Figure 21: Display of users belonging to the procuring entity.

The name, the role and the current status (active, inactive, deactivated, etc) of each user are displayed.
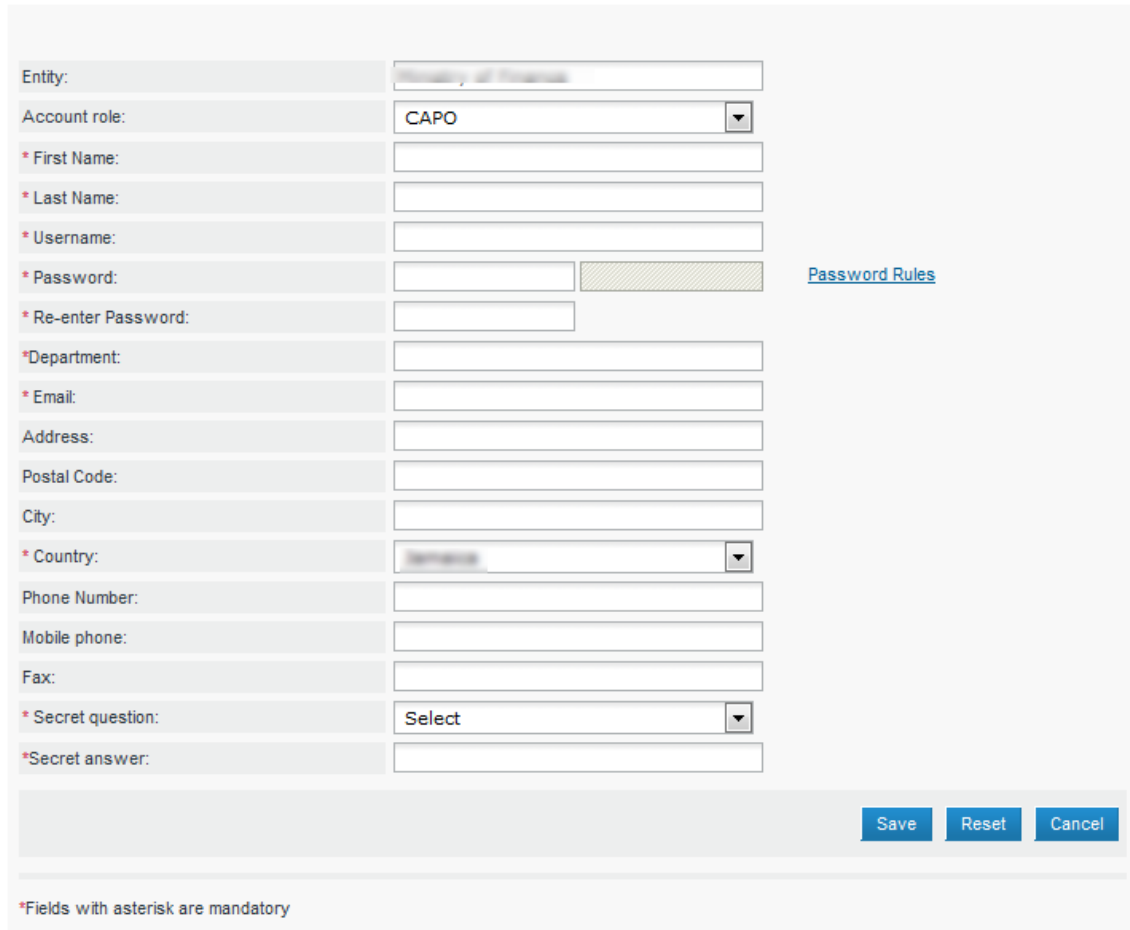
The following user roles are supported:

- Contracting Authority (Procuring Entity) Procurement Coordinator (**CAPC**). Users with this type of role are authorised to manage all the information and the users of their Procuring Entity. Furthermore, they have the functionality to create and publish competitions, to approve the evaluation report, to award the final contract and publish the relevant notice.

- Contracting Authority (Procuring Entity) Procurement Coordinator Assistant (**CAPCA**). Users with this type of role have access to similar functionalities with CAPC users except they cannot approve the evaluation report.

- Contracting Authority (Procuring Entity) Procurement Officer (**CAPO**). Users with this type of role are provided with limited functionality within the Procuring Entity. Their provided functionality is inherited when they are associated with a competition (as Tender Coordinator, Opening Staff and Evaluation Staff. For more information see section 8).

3.3   Insert a new user in a Procuring Entity

The user can insert a new user in a particular procuring entity by providing all of the following details:

Figure 22: Insert a new user in a procuring entity

3.4   Edit user's details

The user can select to edit the details of a specific user:

Edit account

Username:	
* Account role:	CAPO
* First Name:	
* Last Name:	
Password:	•••••••• Password Rules
Re-enter Password:	
*Department:	
*Email:	
Address:	
Postal Code:	
City:	
Country:	
Phone Number:	
Mobile Phone Number:	
Fax:	
Status:	Active
Valid from:	
Valid to:	

Save   Cancel

* Fields with asterisk are mandatory

Figure 23: Editing user details

4   Supplier NCC pre-qualification status

Any PE user has the rights to view the qualification status of a supplier, as this is defined by SA users. To achieve this, the PE user must access the NCC pre-qualification page under the Supplier Qualification menu, the system presents to the user the:

- Organisation Name

- NCC Qualification status

- Creation date of the supplier

- Expiration date if supplier is qualified

Figure 24: Qualification status of Suppliers

Figure 25: Qualification history of a Supplier

5 Searching Functionality

The e-GP system provides Simple and an Advanced search mechanisms. Both functionalities allow searching for Competitions, Organisations and Users.

5.1 Simple search

The simple search functionality covers searching for available Competitions, registered Organisations and registered Users.

Simple search queries are performed by:
1. Selecting the type of searching (Competitions, Organisations, Users) from the selection list.
2. Providing the full name of the required record or part of it using the "*" wildcard.
3. Selecting the button "**Search".**

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

Figure 26: Simple search for Competition

5.2   Advanced search

The advanced search functionality enables searching for Competitions, Organisations and Users. In addition, the functionality supports searching Organisations that fulfil a specific supplier profile. In order to perform an advanced search query, the user should:

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

For further information on each criterion select the respective info icon   .

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

Figure 27: Advanced search for a Competition

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

Figure 28: Advanced search for a Procuring Entity

Figure 29: Advanced search for a Supplier organisation

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

Figure 30: Advanced search for Procuring Entity users

Advanced search

Search for: ○ Competition ○ Organisation ◉ User

User's type of organisation: ◉ Supplier ○ Procuring Entity

First Name :

Last Name :

Username :

Email :

Organisation name :

Country: All

Search   Reset   Cancel

Figure 31: Advanced search for Supplier users

5.3 Latest competitions search

In order to view the latest competitions published within the service, the user can click on the "Current competitions", as depicted in Figure 31. This will present automatically the list of the latest competitions that are available to the user (depending on his/her access rights).

Figure 32: Latest Competition search

5.4 CSV export

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

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

6 Bidding/Competition advertisement

Competitions advertisements are managed through the "**PE Notices**" menu item displayed in the **PE Administration** section. Selecting this option, the user can create the competition advertisement notice

6.1 Creation & publication of an advertisement

As a CAPC user navigate to the depicted left hand side menu.
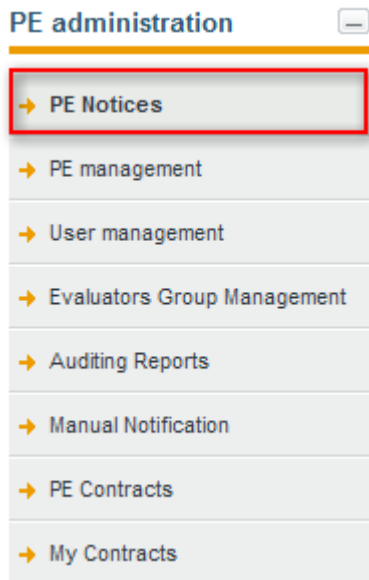
Figure 33: Advertisements section

From the Prior Information Notice page, the user can continue with the following activities:

- **Create** a competition advertisement notice
- **Delete** a competition advertisement notice
- **Edit** a competition advertisement notice
- **Publish** a competition advertisement notice

To create a new notice click on the "Create notice" button.
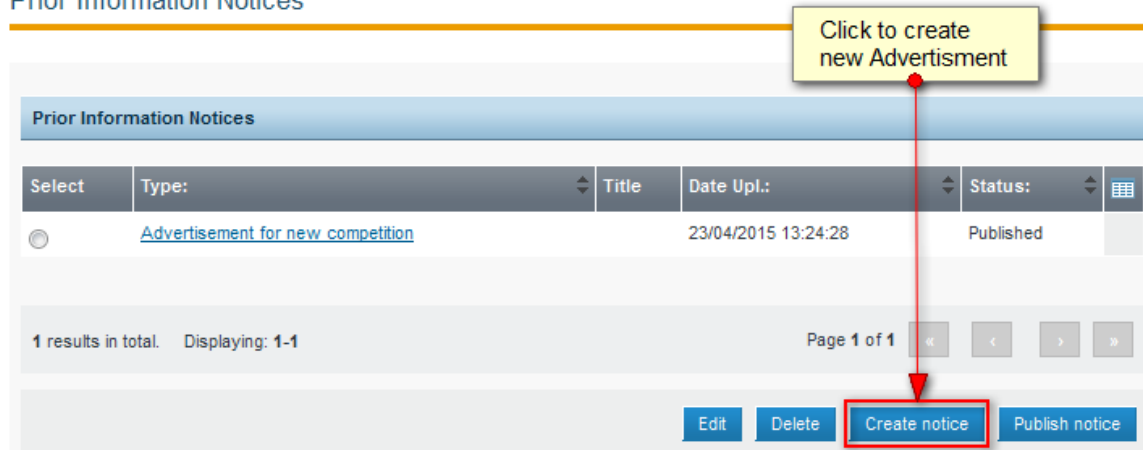
Figure 34: Create new advertisement

The System will pop-up a new window with one available option that the user needs to select and click to enter the respective form by clicking the "Forms module" button.
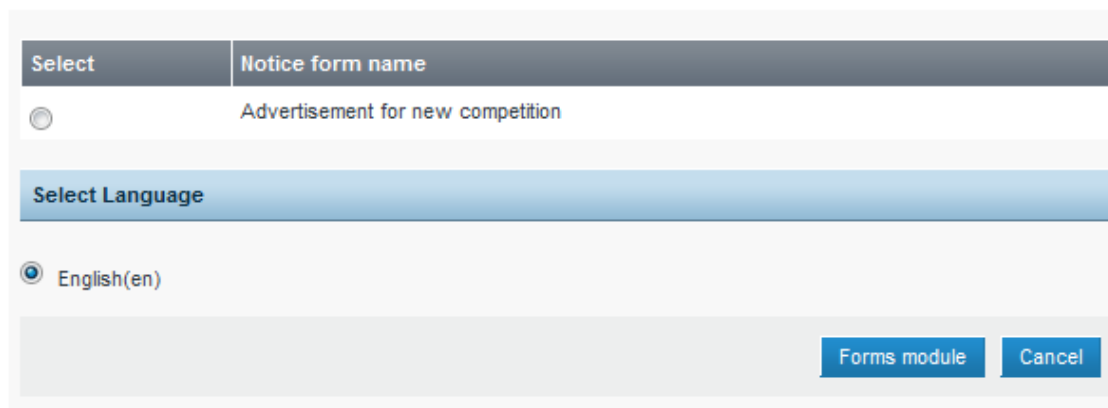
Figure 35: Select advertisement

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

Create notice

Advertisement for new competition

| Exit | Save Draft | | Next |

Completing the form ...

☑ Preliminary Questions

☒ Validating form

The ████ as procurement agent for the Ministry of Finance of Jamaica, informs interested company of the intention to commence a new competition for the supply of goods, services or works.

ⓘ Intended Competition Publication Date

ⓘ Intended Competition Tender Submission Deadline

ⓘ Scope of the competition

Participation to the competition will be possible only for NCC qualified Suppliers. If your organization intends to participate in the competition and is not already registered in the e-GP system and/or qualified for procurement competitions, you are kindly invited to:
- register as a Supplier Organsiation within the e-GP system.
- follow the instructions provided upon registration for completing the qualification process.
- contact the e-GP Helpdesk to obtain any additional information.
Your organisation must already be qualified before the Intended Competition Publication Date in order to be able to participate.
Note : In case of Open International Competitive Bidding competitions, supplier's NCC qualification is not mandatory.
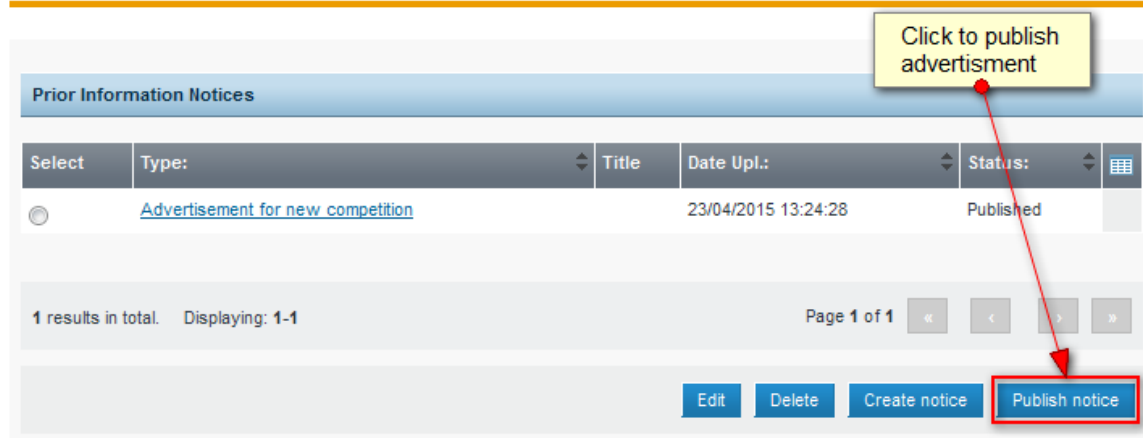
| Exit | Save Draft | | Next |

*Fields marked with * are compulsory

Figure 36: Populate advertisement

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

Figure 37: Publish advertisement

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

6.2   Editing of an advertisement

A created but not published advertisement can be edited by the user prior to publication. The user can select the advertisement that should be editing and click on the Edit button. The system will present to the user the respective form, pre-filled with the original data. The user may perform any changes before saving the advertisement as draft/final.

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

6.3   View all Bidding/Competition advertisements

Users may access all Bidding/Competition advertisements through the "Bidding advertisements" link available under the "Information" left-hand side menu of the e-GP.

7   Annual Procurement Plan (APP)

The Annual Procurement Plan process is a prerequisite for the initiation of a competition procedure.

7.1   Create an Annual Procurement Plan request

For launching a new APP process a CAPC/CAPCA user of Ministry of Finance (or any Entity that has the "Manage the APP" option enabled) will need to login the e-GP. Under the "Annual Procurement Plan" left hand-side menu (Figure 38) the user may choose to create a new APP by accessing the respective page.

Annual Procurement Plan —

→ Annual Procurement Plan

Figure 38: Initiate "Annual Procurement Plan" process

Upon visiting the new page the user will be required to fill in the following;
- Annual Procurement Plan Expiration Date: Mandatory field. Date until which the Procuring Entities may respond to the APP request before the consolidation of responses on to a National Level and publication takes place.
- Description : Optional Field

Annual Procurement Plan

Annual Procurement Plan

| Template plan: | Download |

Create Annual Procurement Plan

*Expires At: [_____] 📅 hh: [00 ▼] mm: [00 ▼]

Description:
[   ]
(Maximum characters: 50000).

[Create]

*Fields with asterisk are mandatory

Pending Plans

#	Organisation name	Level
1		1
2		2
3		2
4		1
5		1

Displaying all 5 matches.   Page 1 of 1 « ‹ › »

Figure 39: "Annual Procurement Plan" details

Once the mandatory fields are populated the user clicks on "Create" button and the system creates a "per entity response file". Once the APP request is dispatched, the Procuring Entities will be enabled to send their responses.

View the Procuring Entities that may respond to the APP request, under the "Pending Plans" section. The CAPC/CAPCAs of these entities will be tasked to "Respond to the Annual Procurement Plan request" after the "Create" button is selected.

Figure 40: Procuring Entities states to respond to the APP

7.2   Respond to Annual Procurement Plan

The CAPC/CAPCA users of invited Procurement Entities will be able to respond to the request for APP submissions. Either through the respective task or the available menu the user accesses the relevant page.
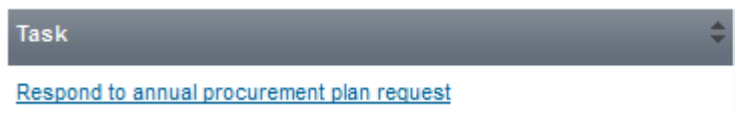
Figure 41: Respond to APP task

Figure 42: Annual Procurement Plan link

Please note that at the current stage ONLY valid responses are accepted by the system. The user may download the APP template file, populate it and uploaded as the APP response. Alternatively the user may not upload any file and will not be included in the National Level Annual Procurement Plan after the consolidation process.

Annual Procurement Plan

Annual Procurement Plan

App ID:

Created At:

Expires At:

Description:

Template plan: Download

Submit Annual Procurement Plan

*Annual Procurement Plan: [Browse...] No file selected.   [My Plan ▼]

[Submit]

*Fields with asterisk are mandatory

Figure 43: Upload APP response

After the response is submitted, the user should select the "Submit to next level" button. The entity's response is now submitted to the "parent" entity for consolidation.

Annual Procurement Plan

Figure 44: Submit APP response to next level

7.3   Consolidate APP responses

Once the deadline for responding to APP request expires (or at any time before that point) the system will enable the CAPC/CAPCA users, of the PE that created the APP request, to consolidate the responses received (if any). Previously, the individual APP responses have been consolidated in a Group or Ministry level. Each "parent" entity has the obligation to consolidate the plans of its "children" entities and submit the new consolidated plan to the upper level.

Figure 45: Consolidate responses

Once consolidation is completed the system redirects the user to the results page where the consolidated plan is available for download. User may download, review, update the file and upload it into the system. ONLY valid consolidation files will be accepted at this stage. For all Procuring Entities that have not provided an APP xls, the system will automatically not include any entries in the consolidated plan, regarding those entities.
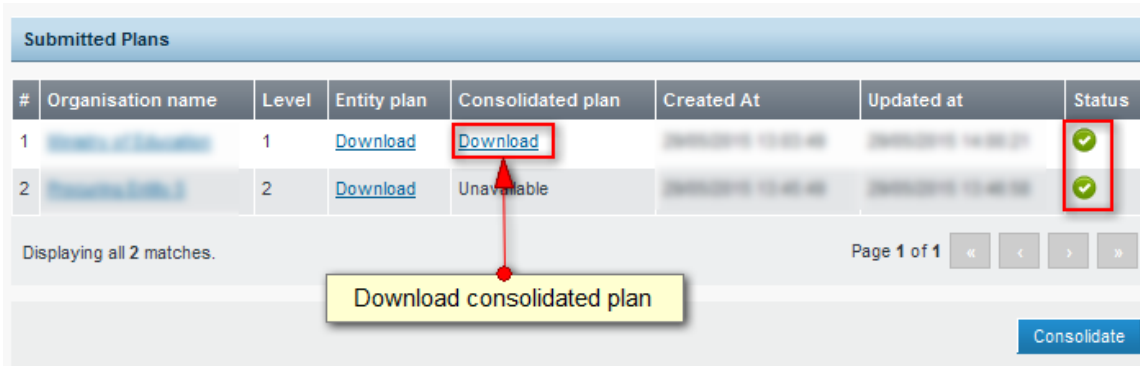
Figure 46: Consolidation results

Figure 47: Submit Consolidated Plan

7.4   Consolidation at MoF level / Publish Annual Procurement Plan

Once the lower levels have completed the individual consolidation processes, all the plans are consolidated at the Ministry of Finance level. MoF should repeat the same procedure as all the PEs, submit its own plan and then consolidate all submitted plans at a National Level.

Annual Procurement Plan

Annual Procurement Plan	
Template plan:	Download

Submit Annual Procurement Plan

*Expires At: [ ] hh: 00 mm: 00

Description: APP

(Maximum characters: 50000).

*Annual Procurement Plan: [Browse...] No file selected. [My Plan]

[Submit]

*Fields with asterisk are mandatory

Submitted Plans

#	Organisation name	Level	Entity plan	Consolidated plan	Created At	Updated at	Status
1	Ministry of Finance	1	Unavailable	Unavailable			✔
2		1	Download	Download			⚠

Displaying all 2 matches.   Page 1 of 1 « ‹ › »

[Consolidate]

Figure 48: Submit Ministry of Finance APP

Annual Procurement Plan

Figure 49: MoF submit and publish consolidated APP

8 Preparation of a Competition

Once the Annual procurement plan is consolidated and published the CAPC/CAPCA user may click on the "Create new competition" button in order to initiate the competition creation process. Upon clicking the aforementioned button the system will automatically re-direct the user to a new page where a form containing the details of the new competition will be presented. Where possible the user will have pre-filled some of the necessary information while the remaining will need to be completed by the CAPC/CAPCA users.

CfT Creation

→ Create new competition

→ Manual data entry

→ Download Preparation tool
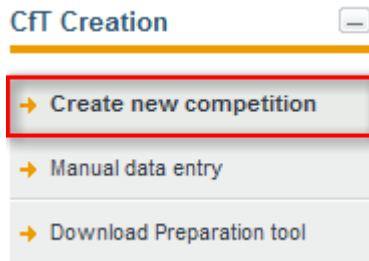
Figure 50: Launch competition creation

User will need to fill in all mandatory information

Figure 51: Competition Workspace

The user can link the competition to an APP entry by clicking the highlighted icon, as shown in the figure above. The user can only choose among items that his organisation had included in their APP response. Any information included in the APP xls file, will be auto-populated in the form.

Create competition workspace | My user role in this organisation is: CAPC

Workspace information

APP reference number:	
*Title:	
*Description:	
	(Maximum characters: 50000).
*Procurement Type:	Goods
*Procurement Method:	Open - ICB
*Procurement Technique:	RFP
*Number of stages:	1
*NCC registration required:	No
*Framework Agreement Establishment:	○ Yes ● No
*Common Procurement Vocabulary (CPV) :	30120000-Photocopying and offset printing equipment
Estimated total contract value:	JMD
Estimated total contract value public:	✔
*Deadline for bid submission:	hh: 00 mm: 00
*Deadline for clarification:	hh: 00 mm: 00
*Allow suppliers to upload attachments to clarification questions:	○ Yes ● No
Bids opening date:	hh: 00 mm: 00
*Evaluation Mechanism:	
*Contract awarded in Lots:	○ Yes ● No

Create competition workspace   Cancel

Figure 52: Workspace details populated

Once the user populates properly all required information the system will create the workspace. User will need to verify the details of the competition, before s/he is able to proceed with the publication. That user is required to edit the details as depicted below. A respective task will also be available in the user's homepage.

View Competition details

My role for this competition is: PO/TC

Competition: asdfas asdfsdf safsdfasdfa (Status: Draft)   Show Menu

Bid submission deadline in (days/hours):	
Name of procuring entity:	
Status:	Draft
Title:	
Competition unique ID:	
Evaluation Mechanism:	
Description:	
Procurement Type:	
Procurement Technique:	
Number of stages:	
Procedure:	
Framework Agreement Establishment:	
Common Procurement Vocabulary (CPV) :	
Estimated total contract value:	
NCC registration required:	
Deadline for bid submission:	
End of clarification period:	
Bid opening date:	
Contract awarded in Lots:	
Date of Publication/Invitation:	
Date of Awarding:	

Edit competition details   Delete competition

Figure 53: Edit details

Figure 54: Finalise editing

8.1 Association of Procuring Entity Users

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

- **PO/TC**. Procurement Officer Tender Coordinators(at least 1 user)
- **PO/OS**. Procurement Officer Opening Staff (at least 2 users)

- **PO/ES and PO/ESR.** Procurement Officer Evaluating Staff (at least 1 user). At least one of the evaluators will be associated as head of the evaluation committee (ESR). If only a single evaluator has been associated with the competition his role must be ESR.
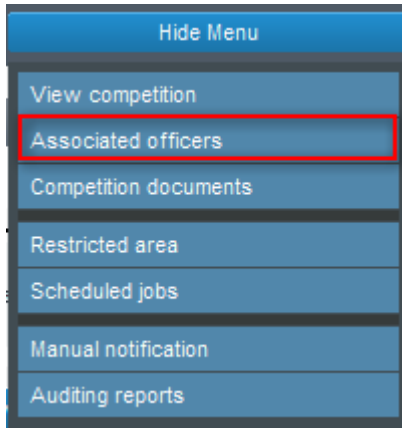
Figure 55: Associate officers

The following user role combinations are also permitted: **PO/TC + PO/ES and PO/TC+ PO/ESR.** The procurement officers assigned with the roles PO/TC and PO/OS should belong to the Procuring Entity where the particular competition is published.

By default the creator of the competition is assigned with the role PO/TC. However, more than one officers (even from different entities) acting as PO/TC may be associated in the context of a competition. Assign a combination of roles and/or select other uses to associate with the specific competition.
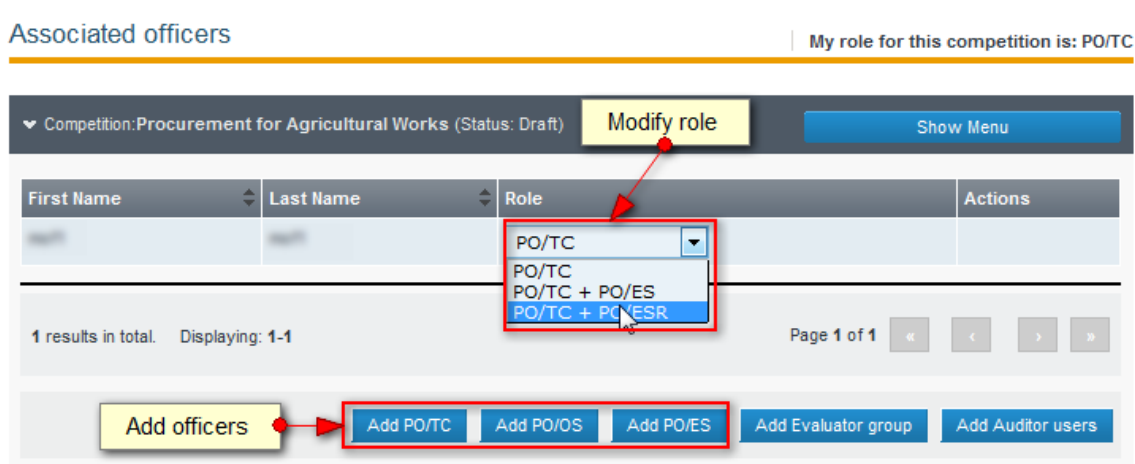
Figure 56: Define roles

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

Figure 57: Search for user to be associated with a specific role

The associated procurement officers assigned with the roles PO/ES and PO/ESR can also belong to other procuring entities.

The users and their roles under the particular competition can be modified at any time. Furthermore, a user can be disassociated from a particular competition by selecting the "**Disassociate**" link next to the user's name (Figure 58).

Finally, an evaluator can be replaced at any time during the procurement process (Figure 58). In this case, all completed evaluations (draft or final) will be copied to the new user's workspace. The status of all finalised evaluations will change to Draft, in order to allow the new user to edit and modify these evaluations.

Figure 58: Modifying the role of an associated user

8.2 Contract documents

From the competition's menu the users that will be appointed with the PO/TC role may create, edit or delete the competition's documentation.
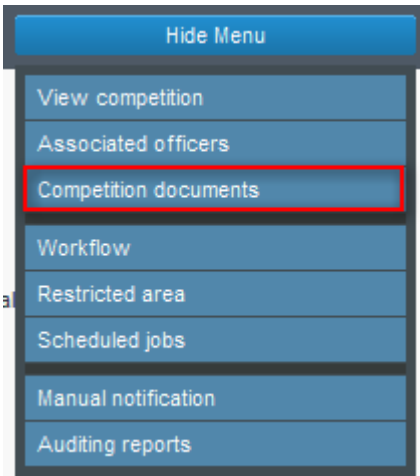
Figure 59: Menu option

The CAPC/CAPCA user of the entity will be able to add and edit as needed the desired documentation.

Figure 60: Add contract documents

User may select to automatically upload all documents from a subfolder of the Template Library by clicking the "Create templates" button. System will process the request and update the competition's documentation accordingly.

Figure 61: Create/load/edit document

All documentation is created in a draft status. In order for the created documents to be available to the suppliers after the publication of the competition, the PO/TC will need to update all documents and set their status to final. The user selects the file and clicks to edit button. Amends the status of the file and saves the modification.

In order to add other contractual documentation to the competition workspace the user should:

1. Select the "**Competition Documents**" choice from the "**Competition Menu**"
2. Select the "**Contract Documents**" tab
3. Select the "**Add Contract Document**" button
4. Provide the title of the document
5. Provide a description (non mandatory)
6. Select the file to upload in the system
7. Select the status of the uploaded file (final or draft)
8. Select the button "**Save Changes**"

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

In order to remove a contractual document the user selects the document and then, the "**Delete**" button. The system always prompts the user to confirm his selection, prior to any deletion.

8.3 Define Workflow

The user defines whether the various steps of the competition will be performed online or offline.

Figure 62: Define Workflow

8.4 Define Evaluation Criteria

The user is tasked to define the Evaluation criteria for the competition (if the "Define evaluation criteria" step is set to "Online" in the workflow). The user may define the criteria using sections, subsections and select among a variety of criteria, such as text fields, numerical, dates, attachments etc. All the criteria are organised under three main envelopes (Eligibility, Technical and Financial).

Figure 63: Define Evaluation Criteria

Figure 64: Definition and Management Menus

8.5 Create / Publish Contract Notice

Once all documentation is finalised the user may proceed in the creation and publication of the Contract Notice (for Open ICB or Open NCB procedures). A respective task will be available in the user's task list. The user through the Competitions documentation will navigate to the notices tab.

Figure 65: Create Contact Notice

Figure 66: Form filling tool / notice details

After all the details are populated, the user may save the notice as "Draft" or "Final". Any notice saved in "Final" status is available for publication.

Figure 67: Contract notice publication

8.6 Invitations

Once all documentation is finalised the user may proceed in the creation and dispatch of invitations (for Restricted Bidding or Single Source Procedures). A respective task will be available in the user's task list. The user through the Competitions documentation will navigate to the invitations tab.
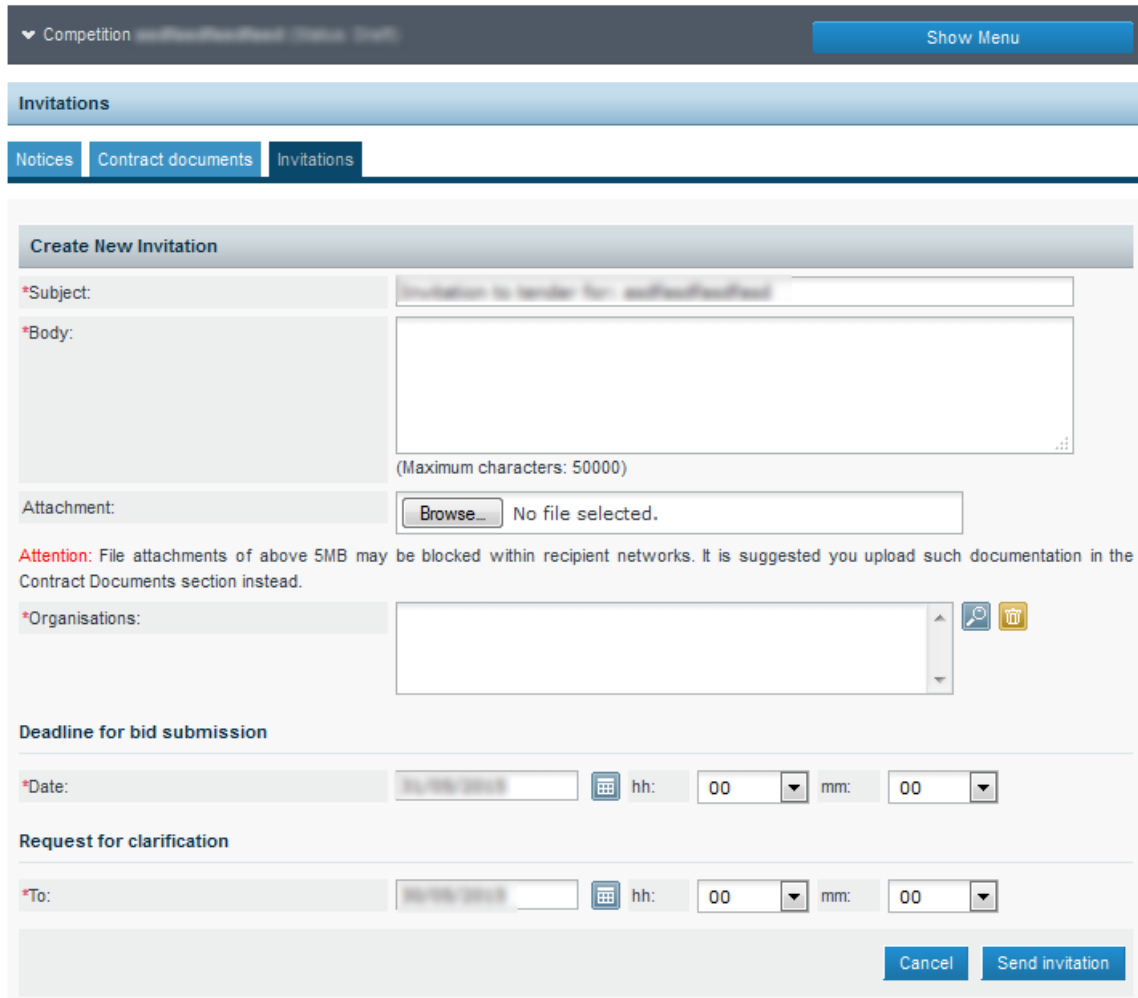
Figure 68: Invitations tab / Create new invitation

User will need to click on "Create new invitation" for the system to auto-generate the respective information

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

Figure 69: Invitation page

By clicking the "Send invitation" the system will dispatch the invitation to all invited suppliers and will trigger the bidding process.

8.7   Clarifications

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

Each clarification request has one of the following statuses:

    The clarification request has not been answered

    The clarification request has been answered

    The clarification request has been published

Once the PO/TC of the competition receives a request for clarification a respective task will be created. User may access the request and create an answer for it.

Figure 70: View clarification request

Figure 71: Reply to clarification request

Upon answering the clarification request, the response will still not be available to the requestor until the publication of the clarification by the PO/TC.

Figure 72: Publish clarification request

Once the clarification is published it will be made available to the Supplier that requested it and possible (depending on the option selected by the PO/TC when answering the clarification) to the rest of the Suppliers associated to the competition. User also has the option to download a PDF file with all published clarifications.

Figure 73: View published clarifications
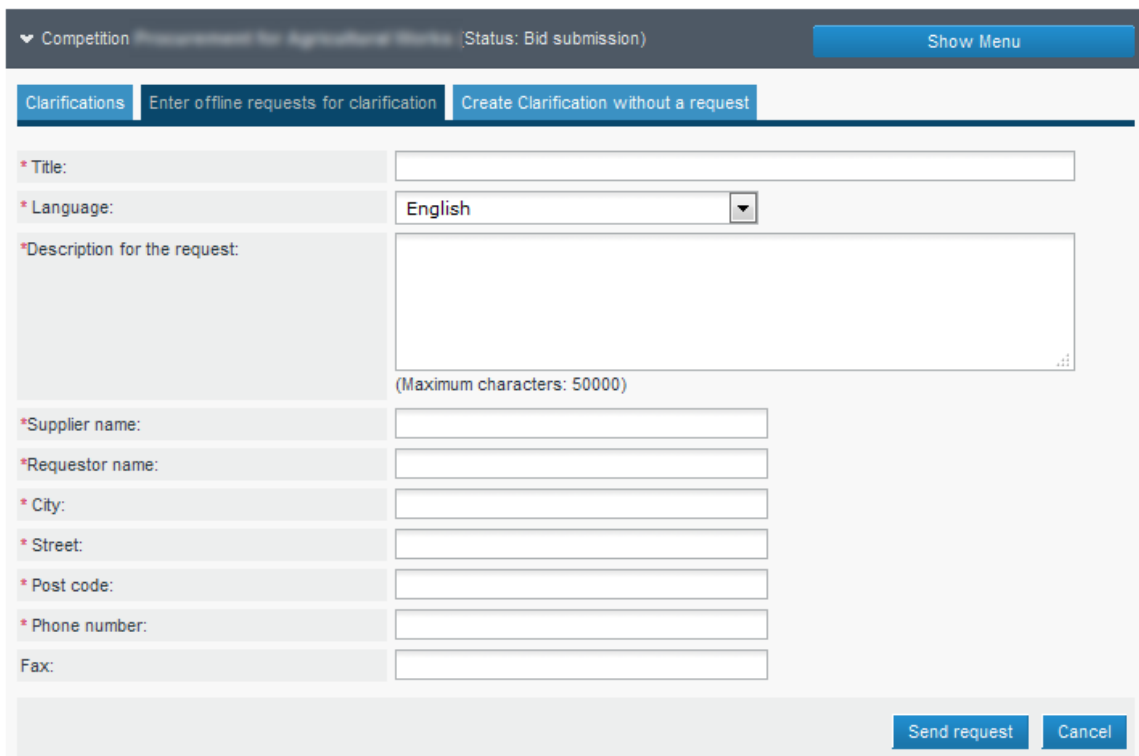
8.7.1 Create an offline request for clarification

In order to create a clarification request which was received offline, the user selects the Tab "**Enter Offline Requests for Clarification**" (Figure 74). The user can then provide the following information (Figure 74):

- Title of the request.
- Language of the request.
- Description of the clarification request.
- Name of the Supplier.
- Name of the requestor.
- City.
- Address.
- Post Code.
- Phone Number.
- Fax number

Figure 74: Offline request for clarifications

8.7.2   Creation of a clarification without request
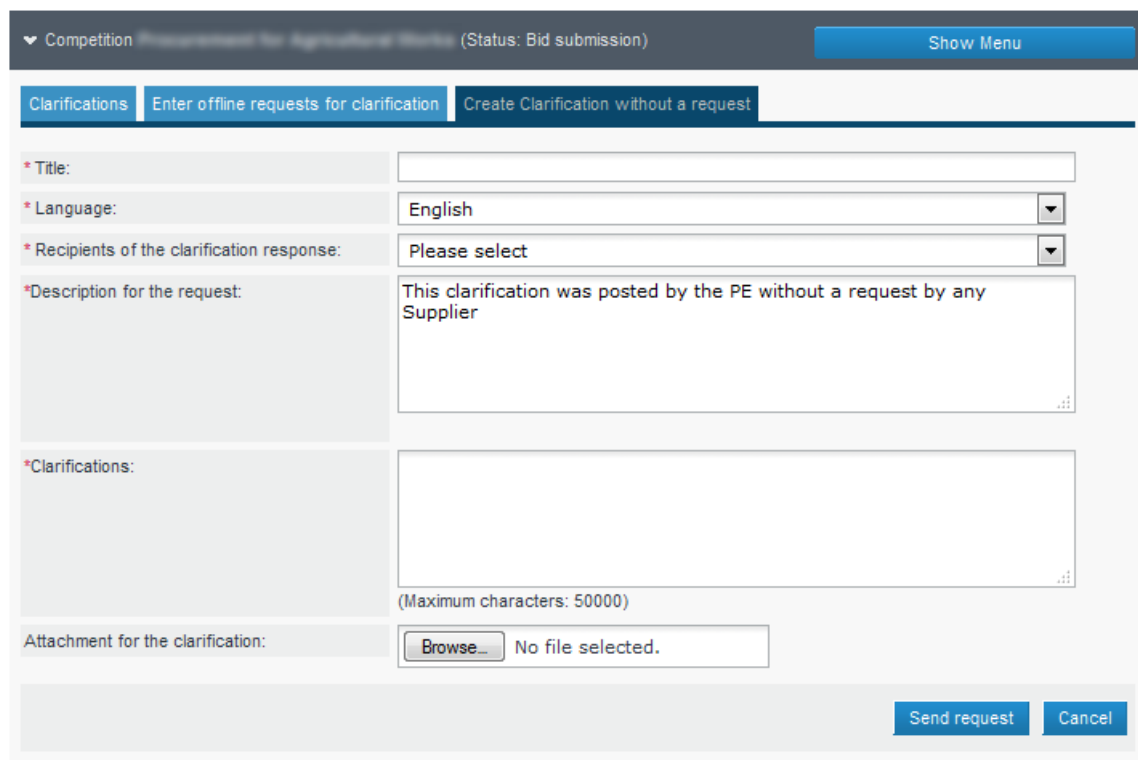
In order to create a clarification without a request, the user selects the tab "**Create clarification without a request**" (Figure 75). The user then provides the following information:

- Title of the clarification.
- Language of the clarification.
- The recipients of the clarification response.
- Description of the request.
- Details (Body) of the clarification.
- Attached file for the clarification (optional).

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

Figure 75: Clarification without a request

9 Bid Opening
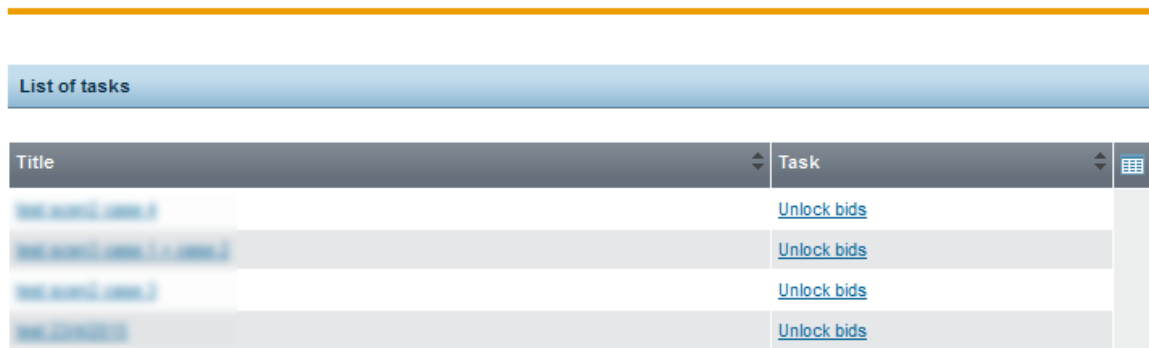
The opening of the tender documents is performed according to the four-eyes principle and requires the involvement of two procurement officers who have been associated as Opening Staff (PO/OS) to the specific competition.

The first PO/OS user submits the list of bid documents which he proposes to be opened. The second procurement officer has the choice to either approve or reject the first opener's choice. Furthermore, the system provides the functionality to the first PO/OS user to insert the details of any offer which is received offline. All these actions are later registered in the automatically generated opening report.

9.1 Unlock bids – 1st PO/OS

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

Task list

Title	Task	
	Unlock bids	
	Unlock bids	
	Unlock bids	
	Unlock bids	

Figure 76: Open bids task

The user wither through the task or the respective menu item from the "Competition's menu" will be able to view the preliminary tender opening page. The user may select to add information for any tenders received offline or proceed in authorising the opening.

Figure 77: 1st PO/OS view

9.2 Add offline bids

In case offline bids have been received the PO/OS may update the system with the respective information. The only limitation is that the Supplier that performed the offline submission must exist as a registered Supplier in the System. The process may be repeated to capture the information for multiple supplier submissions.

Figure 78: Add tender received offline

The PO/OS searches for the respective Supplier through a dedicated search facility.

Figure 79: Search for the Supplier that submitted offline bid

Once all information is inserted the PO/OS will click the "Confirm bids opening" button to authorise the opening of bids.

Figure 80: View of bids to be opened including offline submission
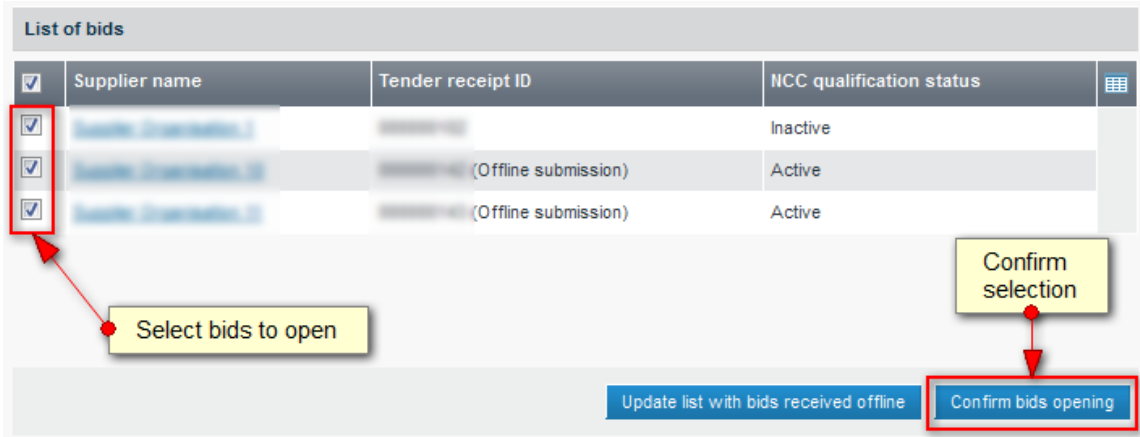
Figure 81: 1st PO/OS approval

In case the user has grounds for not allowing a bid to be opened, then the respective bid should not be included in the list of bids to be opened (i.e. not tick the relevant entry).

9.3   Approve unlocking – 2nd PO/OS

Once the 1st PO/OS authorises bid opening the process reverts to the 2nd member of the opening committee.

Figure 82: 2nd PO/OS view

The user either accepts the proposed bids opening, or rejects the list of bids and proceeds in re-performing the selection process for the bids that are proposed to be opened. In the latter case, the flow will revert back to the 1st PO/OS again to accept the new proposal.

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

Figure 83: Opened bids list view and opening report

10   Evaluation of bids

Through the task or the respective competition menu item, the PO/ES users proceed in the evaluation of the bids until the conclusion of the evaluation process.

10.1 Clarifications during evaluation

During the evaluation phase, the evaluation team of a competition may contact a supplier that has submitted a bid in order to request additional information and/or obtain clarifications for the bid. To do so, a user may access the Clarifications section under the competitions Menu (Figure 84).
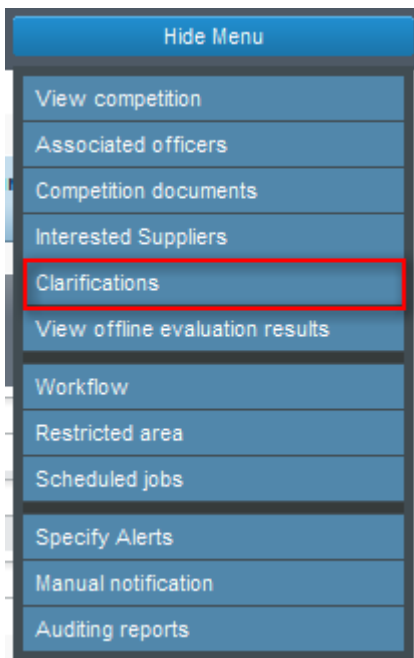
Figure 84: Clarifications link under the competition Menu

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

Figure 85: New clarification during evaluation

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

Figure 86: New task for clarification during evaluation

To view the full details of the supplier response, the user can click on task "View Answer for Evaluation Clarification".

10.2 Evaluation of bids

Figure 87: Evaluation task

The System upon completion of the opening process will generate the "Evaluate bids" task for online procedures or the "Enter offline results" for offline procedures. The user has access to the separate bid of each Supplier.

Figure 88: Evaluation page

The user opens each envelope of the bid and populates the respective scores for each criterion. After all scores are provided, the user will then proceed in finalising the evaluation process and generate the respective evaluation report.

10.3 Evaluation report

Once evaluation results are submitted all PO/ES will have the task to approve the new Evaluation report. Through the respective task or the "Evaluation Report" menu item in the competition's menu the user may navigate to the respective page.
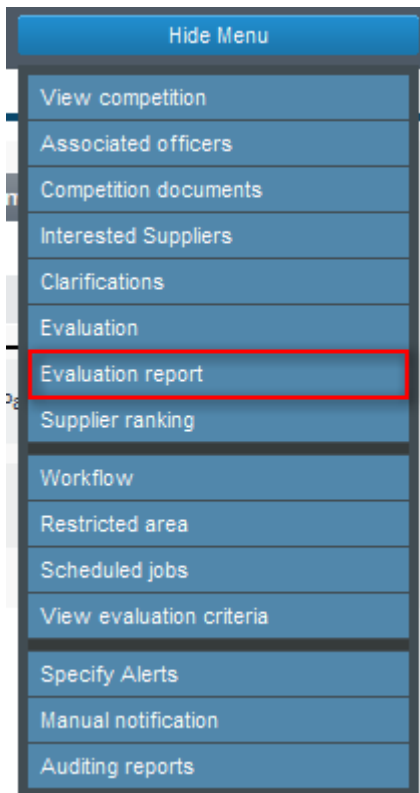
Figure 89: Evaluation report menu item page

All PO/ES users (including the PO/ESR) will need to approve the report in order for the System to proceed in concluding the evaluation process. Any PO/ES may upload an amended Evaluation Report, if deemed appropriate, instead of approving the one available. The new file will also need to be approved by the rest of the PO/ES and the PO/ESR of the competition.

Figure 90: Generate Evaluation Report page

Figure 91: Update / Approve Evaluation Report

Once approved the CAPC of the PE will need to authorise the completion of the evaluation process by providing the final approval. If deemed appropriate the user may reject the whole evaluation and revert the flow back to the opening ceremony.

Figure 92: Finalise evaluation

10.4 Conclude Evaluation

After the approval of the evaluation report, the CAPC users of the entity are tasked to conclude the evaluation process. They have the ability to add comments per submitted bid and take into account the previous comments submitted by the Endorsement Committee Representative (PO/TC)

Figure 93: Conclude evaluation

Figure 94: Announce evaluation results

11 Contract awarding

Once the Evaluation report is approved, the results are announced and the standstill period is over, the PO/TC will proceed in the Awarding phase. Either through the respective task or through the Competition's details page, the user may navigate to the Awarding page.

Figure 95: Award contracts task
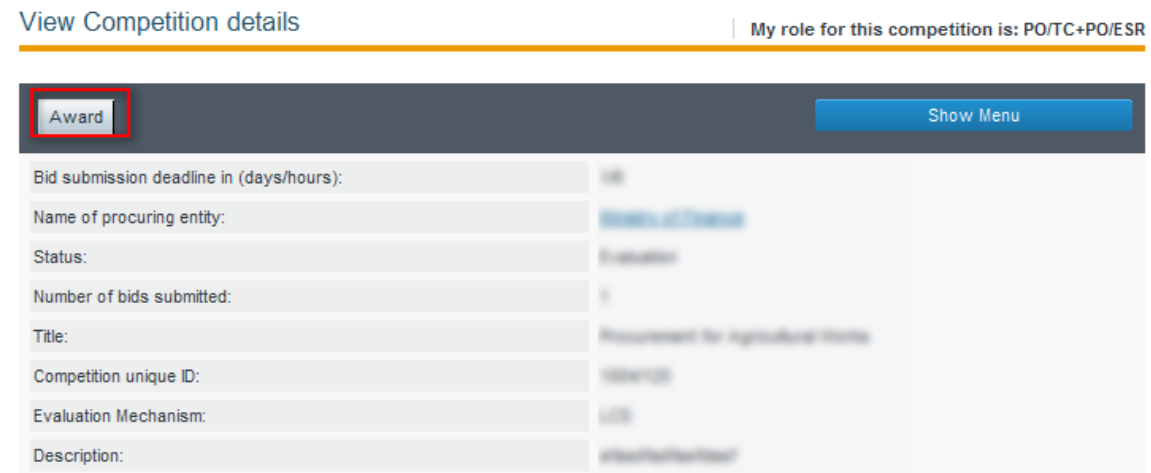
Figure 96: Proceed to awarding (through competition's details page)

Once in the Awarding page, the user may define the contracts value to be awarded to the successful supplier(s).
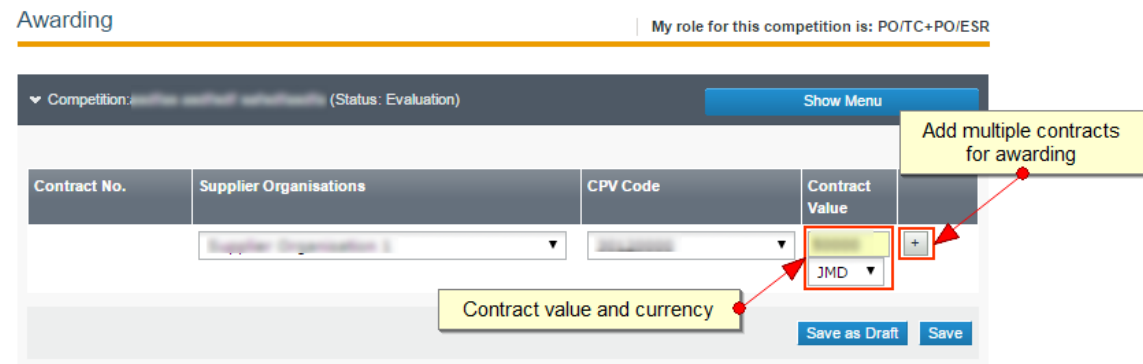
Figure 97: Awarding page

12 Contract Award Notice Publication

Once the awarding of contracts is finalised the user may proceed in the creation and publication of the Contract Award Notice. A respective task will be available in the user's task list. The user will navigate to the notices tab through the Competitions documentation.

Figure 98: Create Contact Award Notice

Figure 99: Form filling tool / notice details

After all the details are populated, the user may save the notice as "Draft" or "Final". Any notice saved in "Final" status is available for publication.

Figure 100: Contract award notice publication

13 Contracting

13.1 Create Contracts

After the awarding phase, the PO/TC will be tasked to "Create Contracts" for this specific competition.
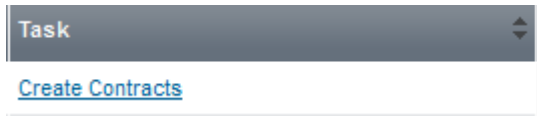
Figure 101: Create Contracts task

Figure 102: Create Contracts link

Figure 103: Create Contract page 1/2

Contract Manager/Representative name & contact:	
Records of meeting dates, attached minutes:	
Issues:	
Complaints:	
Variations:	
Any penalties applied:	
Copies of contractor evaluation surveys:	
Insurance Contract:	☐
Expiry Date:	
Attachment:	Browse... No file selected.
Status:	◉ Active ○ Expired
	Save Contract

Figure 104: Create Contract page 2/2

13.2 View Associated Contract Managers

The user can view the Associated Contract Managers by selecting the respective option from the Contract Menu.

Figure 105: View associated contract managers

13.3 Add/Replace/Disassociate Contract Manager

The user can add, replace or disassociate managers for a contract by selecting the highlighted links.

Figure 106: Add/replace/disassociate contract managers
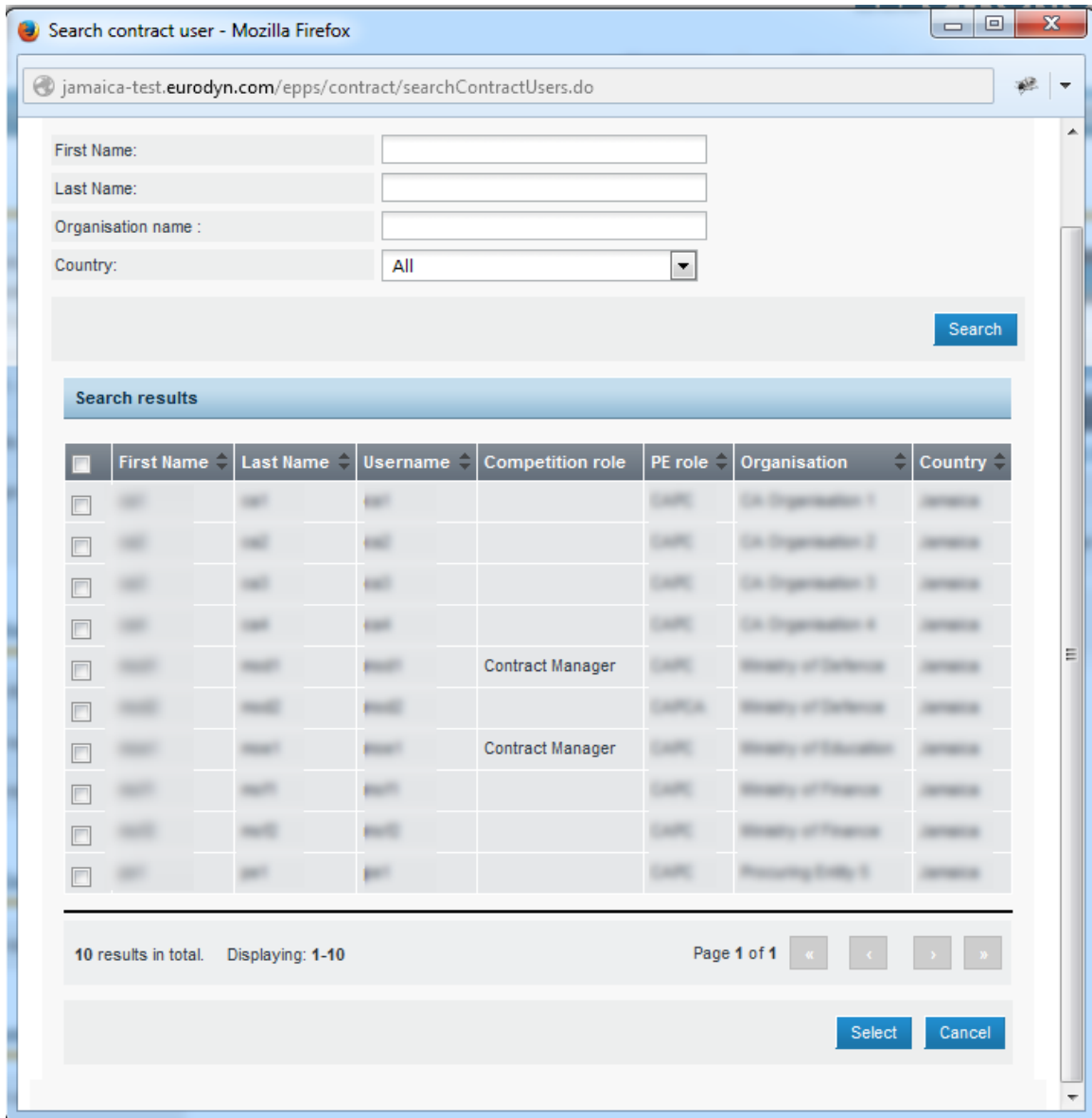
Figure 107: Add/replace contract managers

13.4 View Contracts

The user can view all the details of a contract by selecting the "PE Contracts" or "My Contracts"link.
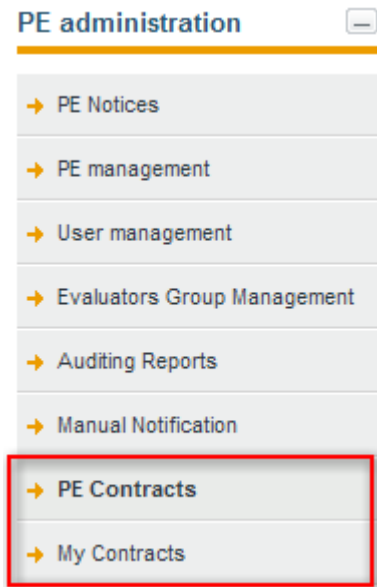
Figure 108: View PE Contracts link

Figure 109: List of contracts

14 Helpdesk contact details

To contact the e-GP helpdesk you may visit the "Contact Us" link.
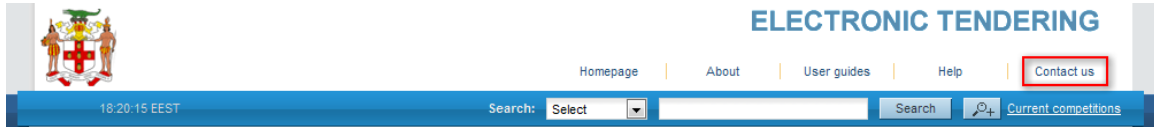
Figure 110: Contact us link

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

Figure 111: Contact us form

15 Auditing Reports

Functionality "Auditing Reports" enables the generation and display of customised reports in order to analyse system usage by users. For each competition, the user assigned the PO/TC role has access to the audit report of the specific competition. The user selects the respective option from the competition's menu in order to access the audit facility.
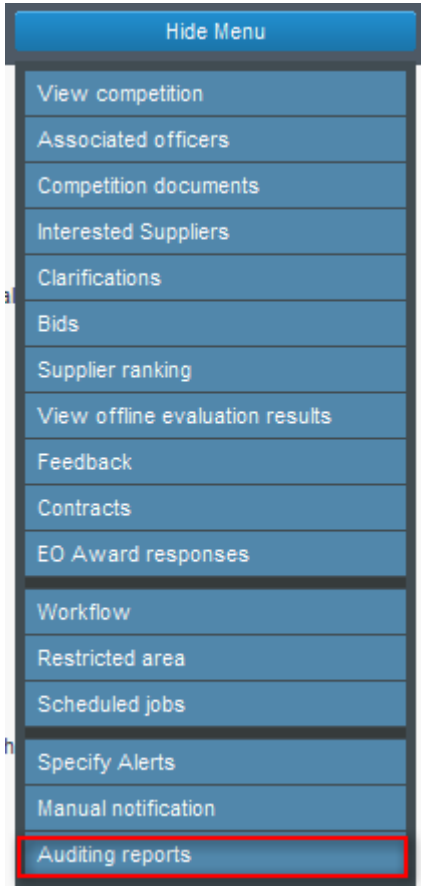
Figure 112 : Auditing reports menu item

The user may select the period for which s/he wishes to view the activity on the specific procurement and even specify the exact actions, as well as, the specific user the actions of whom are of interest.

Figure 113: Auditing facility