PEPPOL

eCATALOGUE

MANAGEMENT TOOL

Pre-Award and Post-Award Phases

Version 1.0

PEPPOL 2011-01-01

Table of Contents

1. Document information

1.1. Document history

Date	Version	Initials	Changes
2010-10-11	0.1.0	JRR	Initial version
2010-10-12	0.2.0	JFA	Updating descriptions
2010-10-26	0.2.1	LB, SU	Updating descriptions
2011-01-01	1.0.0	LB	Updating descriptions

1.2. Editors

Initials	Name	Company
ARM	Angela Roca Márquez	Alfa1lab
JFA	Joan Farfan Armas	Alfa1lab
SU	Selmin Ustaoglu	Consip
LB	Leonardo Bertini	Consip

2. Introduction

This document guides the user through easy steps about how to run Pre-Award and Post-Award phases in the PEPPOL ECatalogue Management Tool. In a nutshell ,It contains simple lessons about how to set up your CallForTender document as Contracting Authority, or a Tender document as Economic Operator, followed by importing them to get new options in the Client, etc. and finally how to get a completely Post-Award Catalogue accepted or rejected.Prerequisites

The eCatalogue Management Tool has an important requisite on the computer (See the document “PEPPOL Demonstrator Tutorial” on Prerequisites section)

The eCatalogue Management Tool must be installed (See the document “PEPPOL ECatalogue Management Tool User Guide” on How to Install section)

DEMOCLient is operable with two roles:
- Economic Operator: **EcOp**
- Contracting Authority: **Ca**

(See the document “PEPPOL ECatalogue Management Tool Tutorial” on Lesson: Managing Roles)

You can find the document on:

http://www.peppol.eu/peppol-eia1/ict-architecture/pre-award-eprocurement/designs/

3. Pre - Award Phase

Contracting Authority (Ca)

In this phase, Ca starts the transaction creating the CallForTender document.

Figure 1: Graphic provided from CenBii

in the main menu, select the option to create a New CallForTender document.

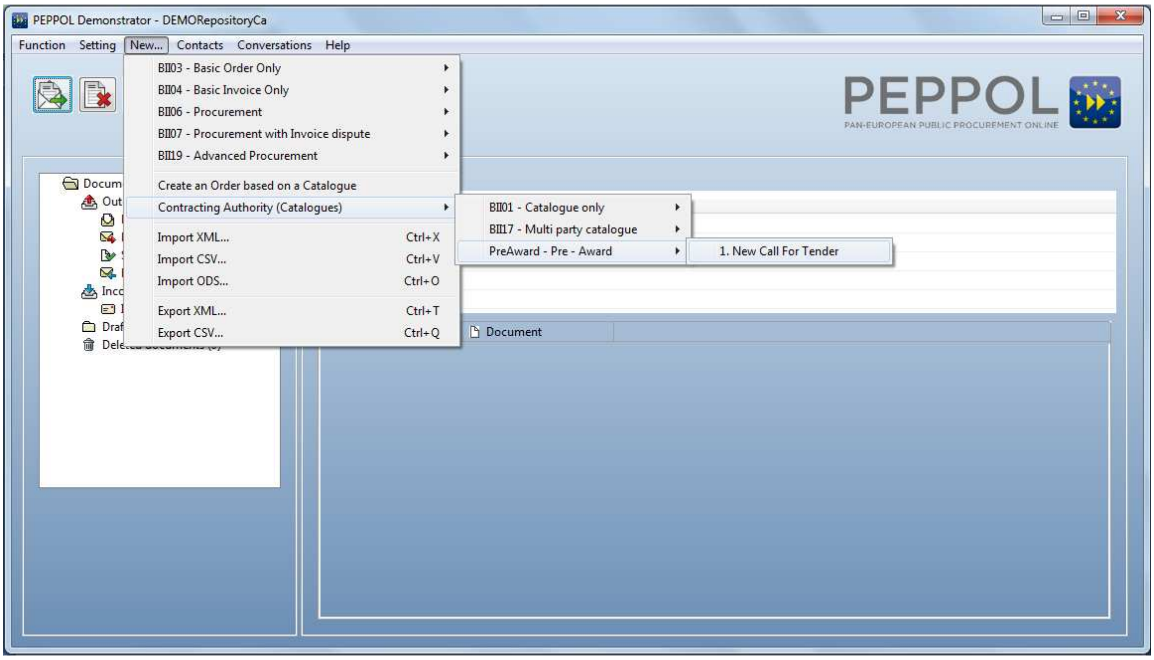

Figure 2: Selectng the New CallForTender option

Fill relevant information in the **Details** and **Customer Party** tabs.

Note that mandatory fields are marked with *.

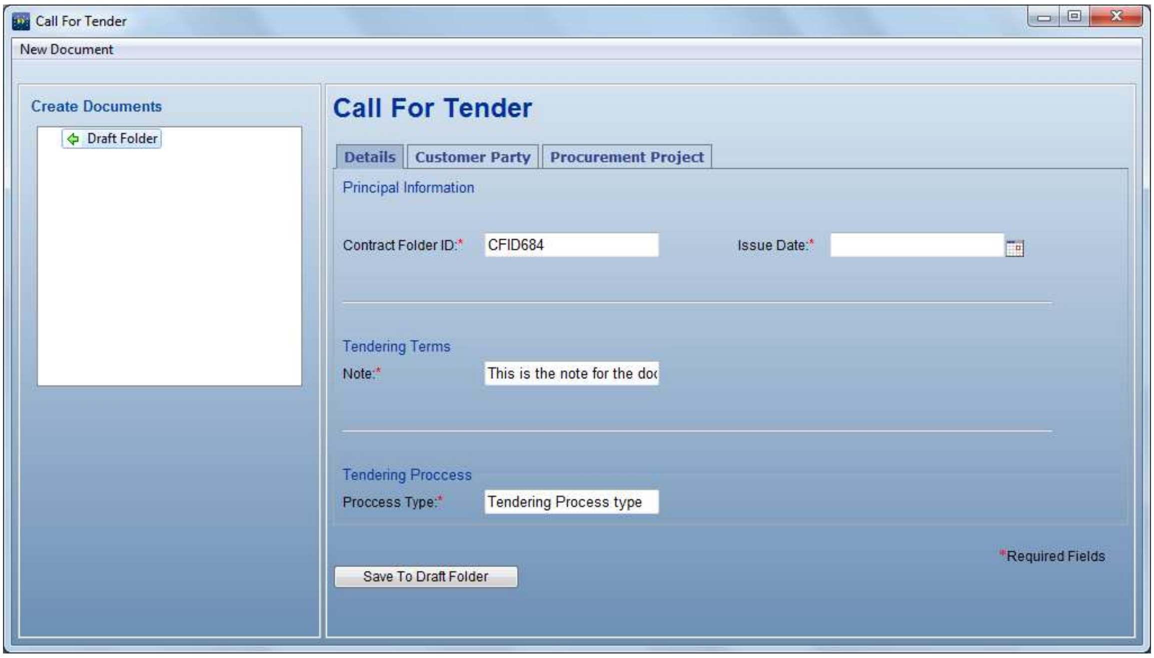

Figure 3: Detail tab form

In the **Customer Party** tab, it is very important to insert a valid Party Name and its Endpoint Id.

The Client allows to select them from a list (configured in the Contacts Administration option).

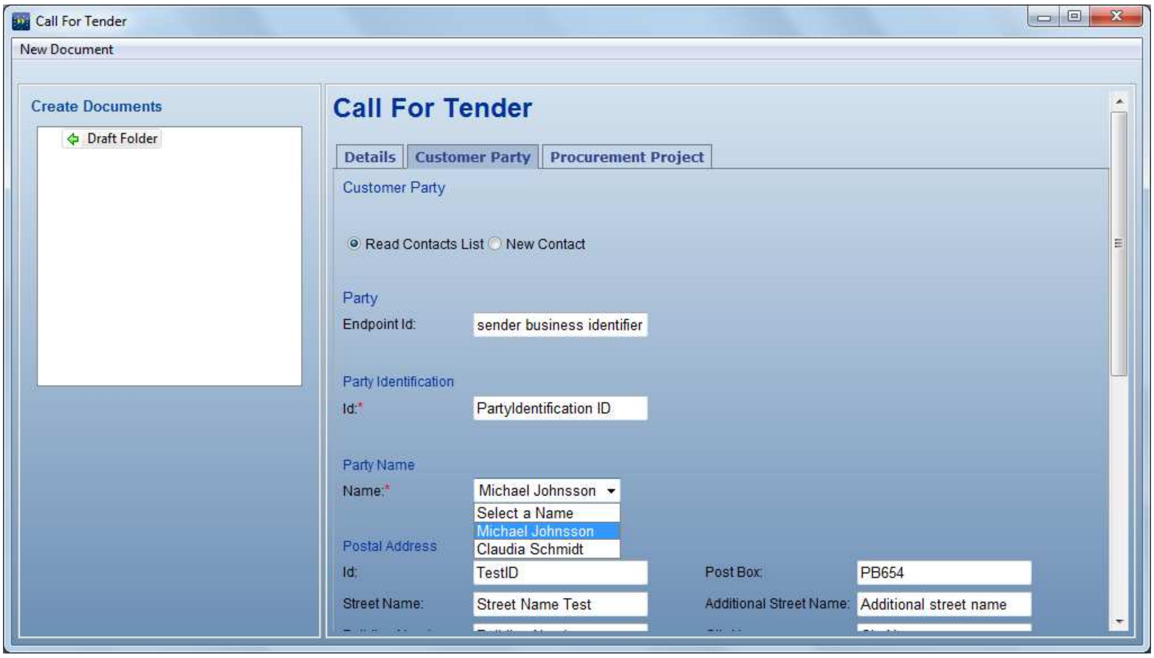

Figure 4: Customer Party tab form

In the last tab, **Procurement Project**, the Client allows to insert Request For Tender Lines so the **Ca** can fill in detail the products it requires.

Figure 5: Procurement Project tab form

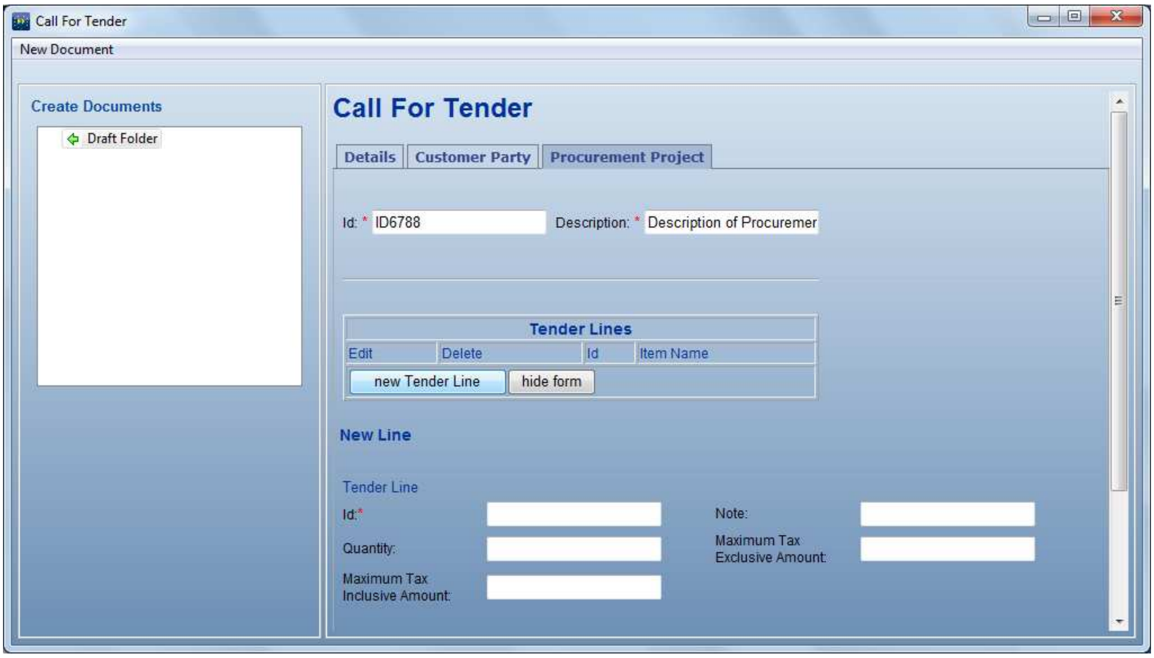

Figure 6: Pressing the New Request for Tender Line button

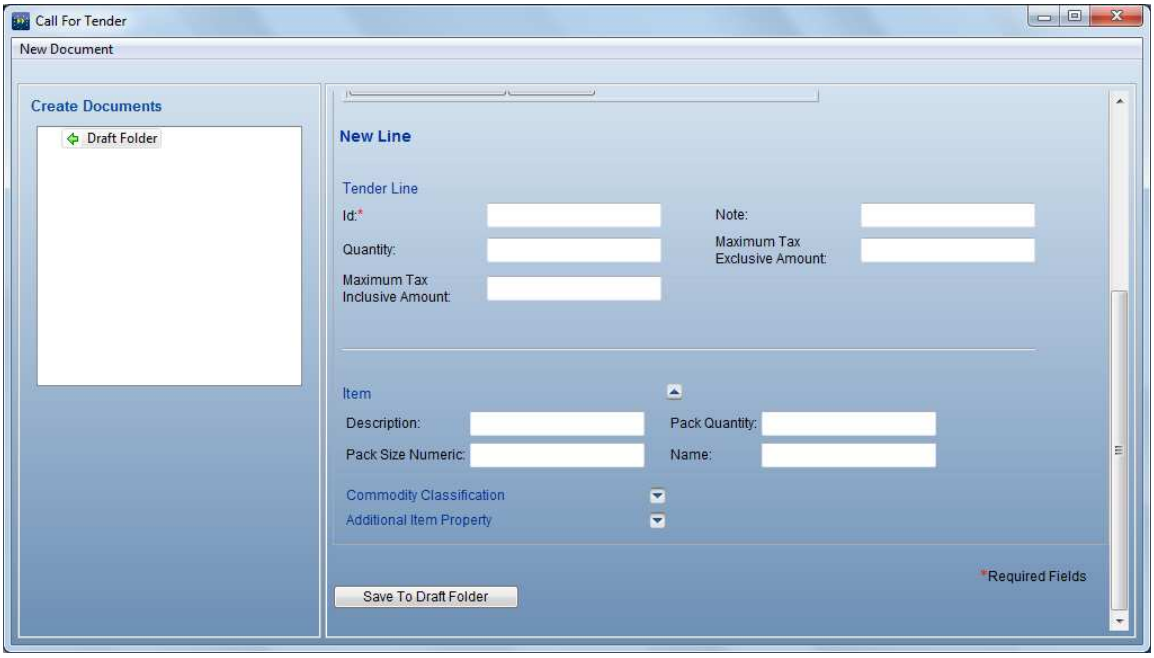

Figure 7: Request for Tender Line form

Having completed the filling process To save the document , press the button **Save To Draft Folder** at the bottom of the form. This option will allow the user to edit the document or to insert later a new tender line request .

Figure 7: Request for Tender Line form

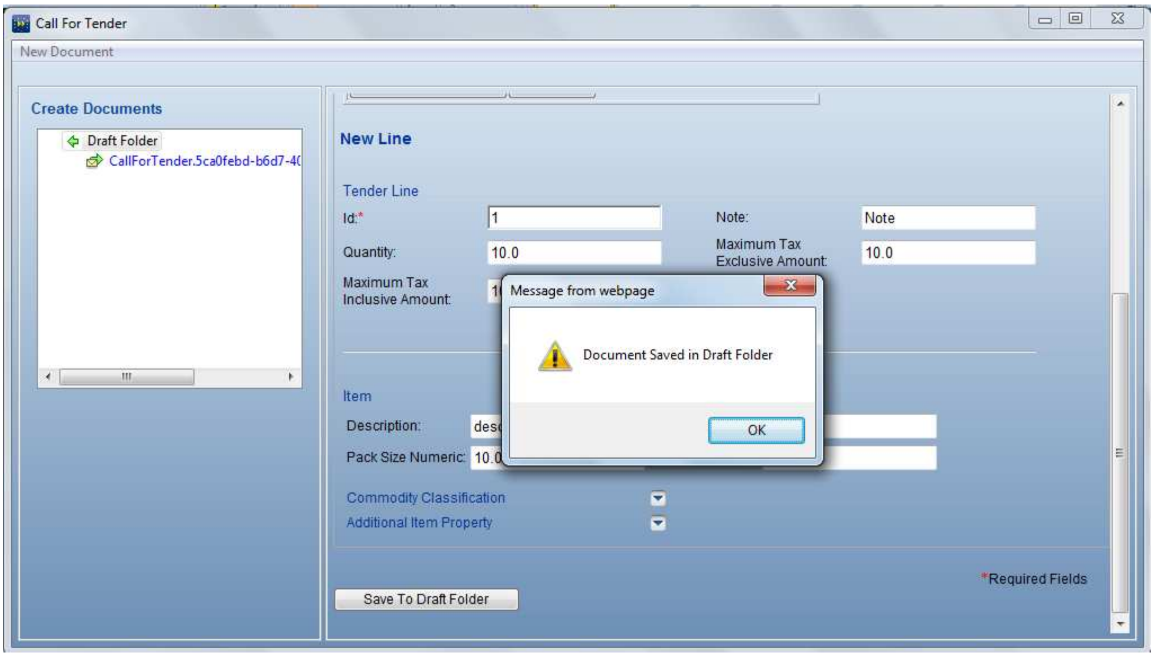

Figure 8: Saving in Draft Folder

Then, in the main interface the Client will save the document into the Draft Folder in the main interface

Figure 9: Displaying the document in the main interface

The drafted Call for Tender document can be displayed clicking Show Document Button on the Main Interface.

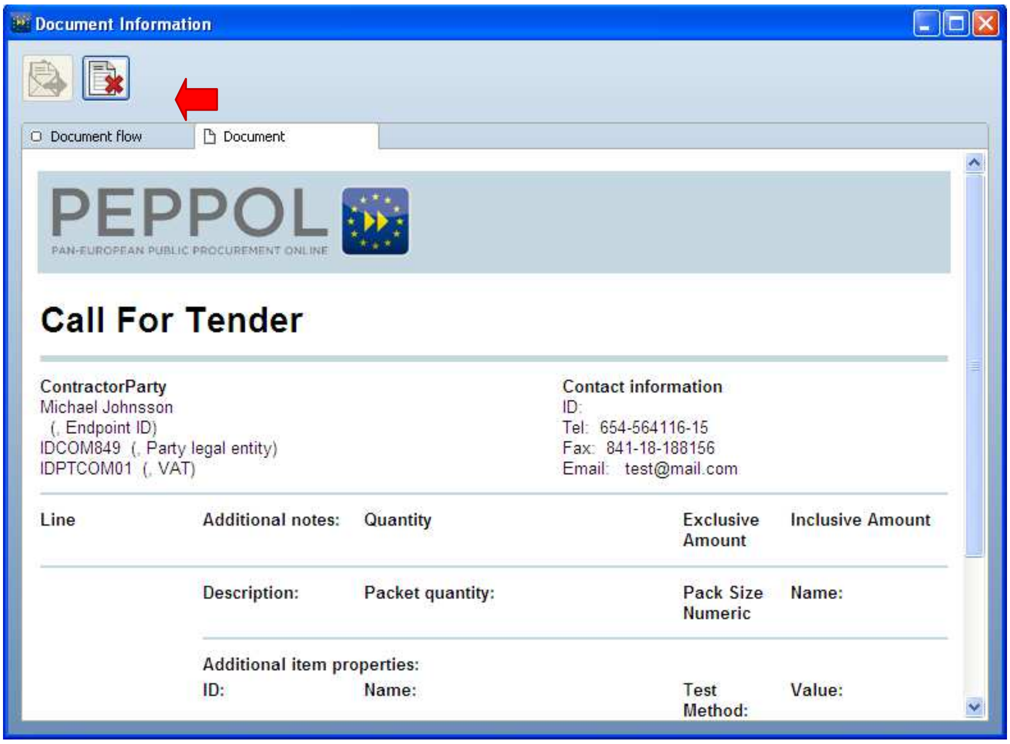

Figure 10: Displaying the document in a HTML form

Now the **Ca** can export the CallForTender document so that **EcOp** can import it.

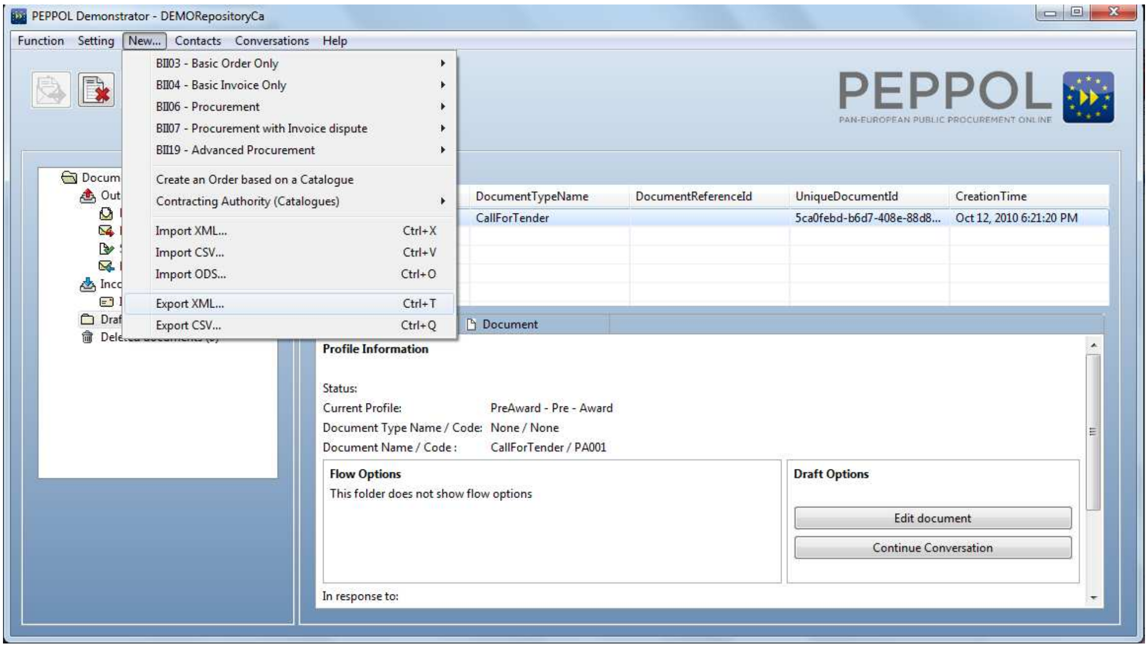

Figure 10: Export option

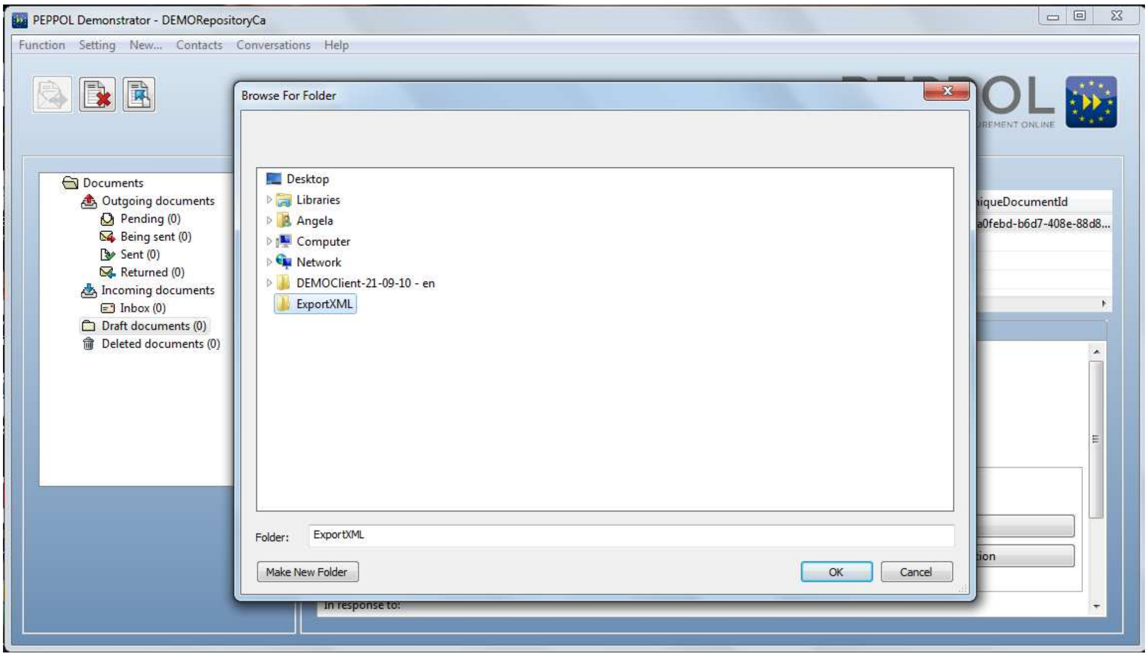

Figure 11: Export browsing

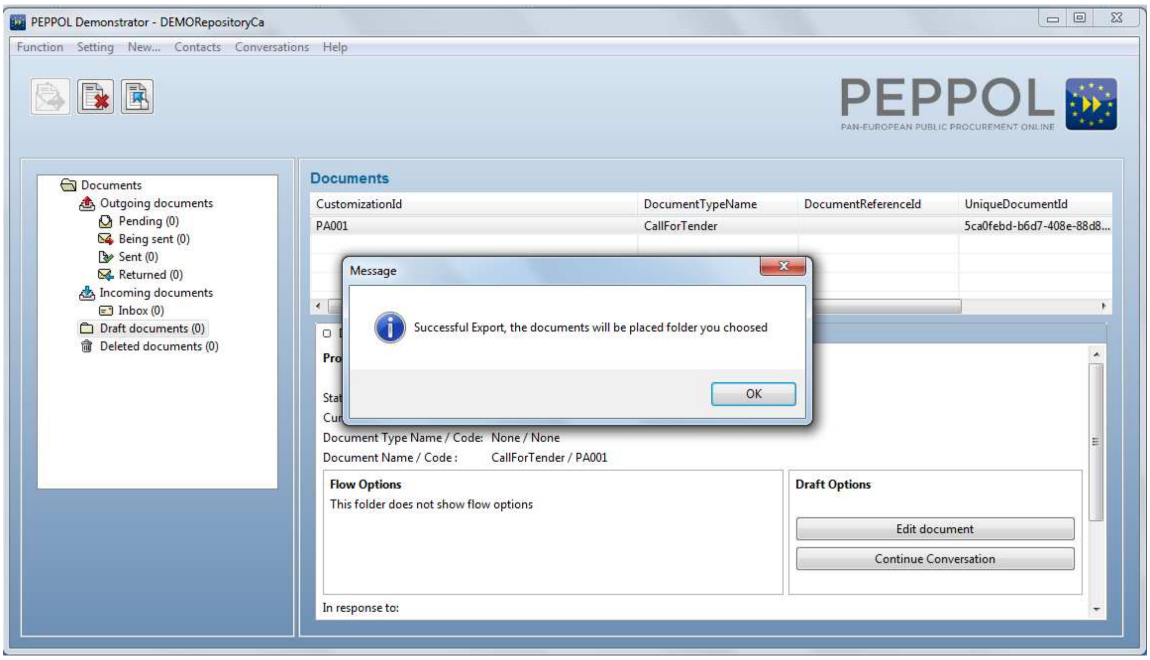

Figure 12: Message of the Export function

Economic Operator (EcOp)

The **EcOp** can import the CallForTender through the Import option of the Client.

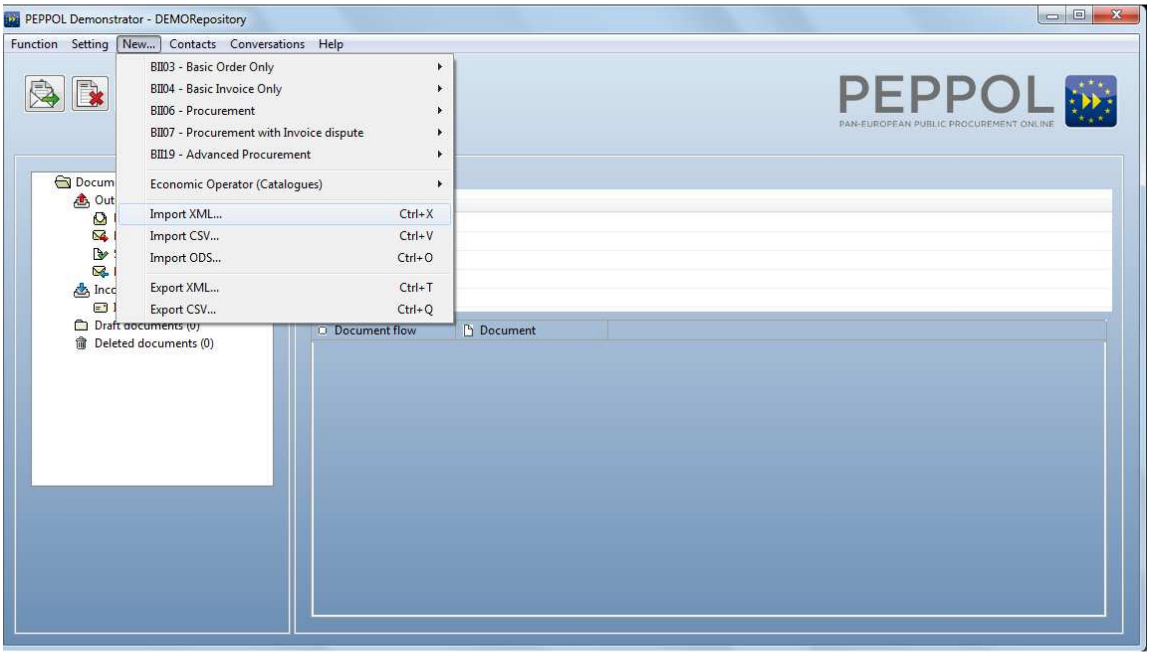

Figure 13: Import option

Selectingbrowse it can be found the CallForTender document that will be imported.

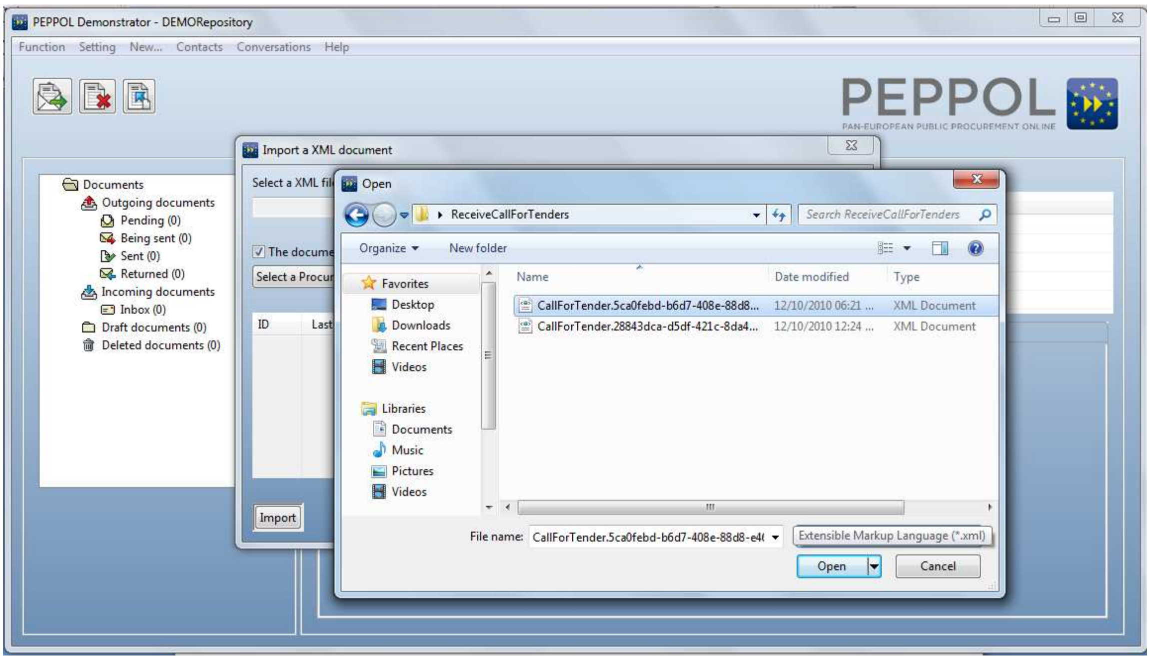

Figure 14: Import browsing

Then, select the Procurement type it belongs to, in this case Pre – Award.

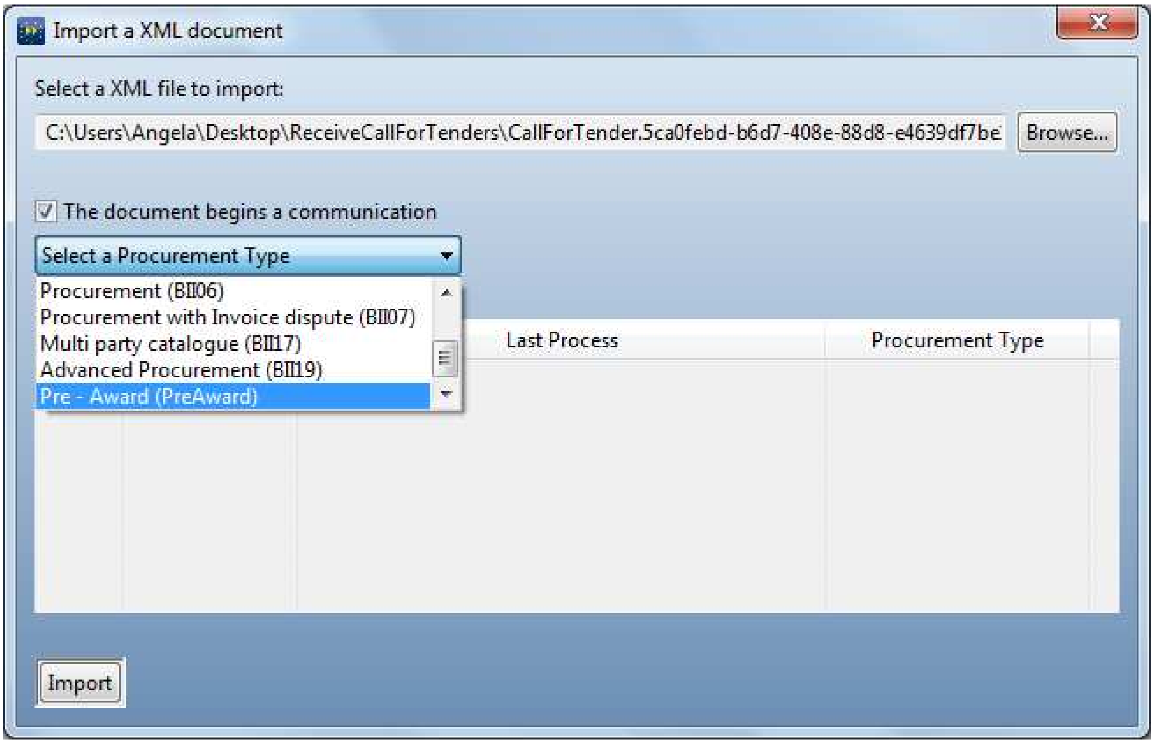

Figure 15: Selecting the correct procurement of the imported document

After this step, press the Import button. It is important to check the message after pressing the button, because the message i includes the Document ID which the Client will work with.

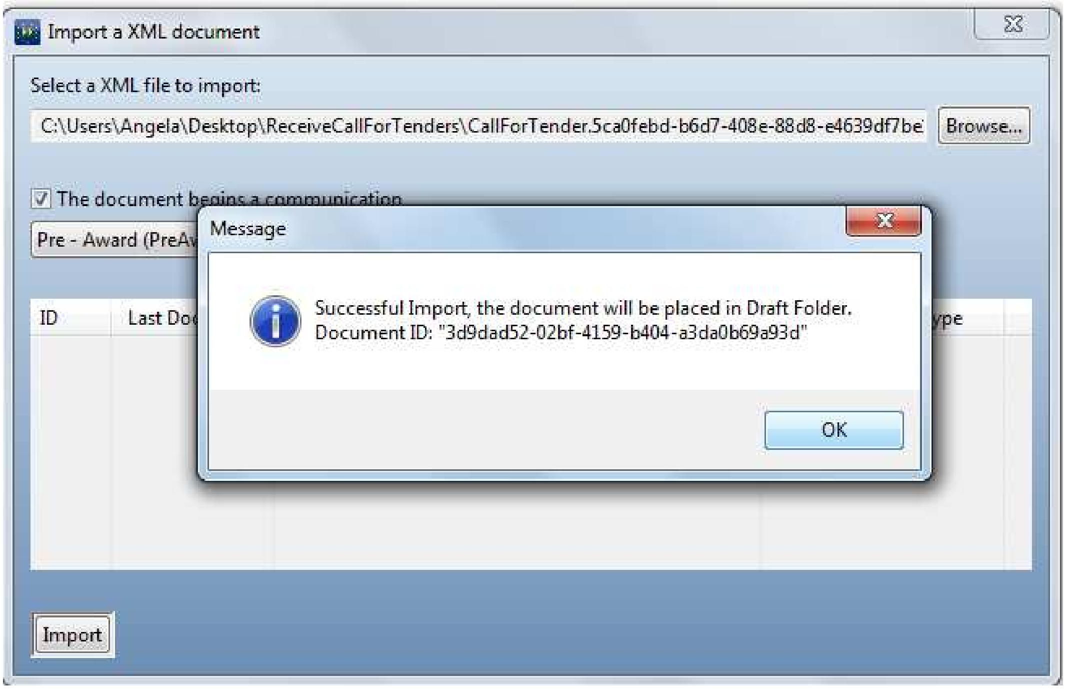

Figure 16: Message of the Importing function

Now the Client displays the imported document in the main interface and places it into the Draft Documents Folder.

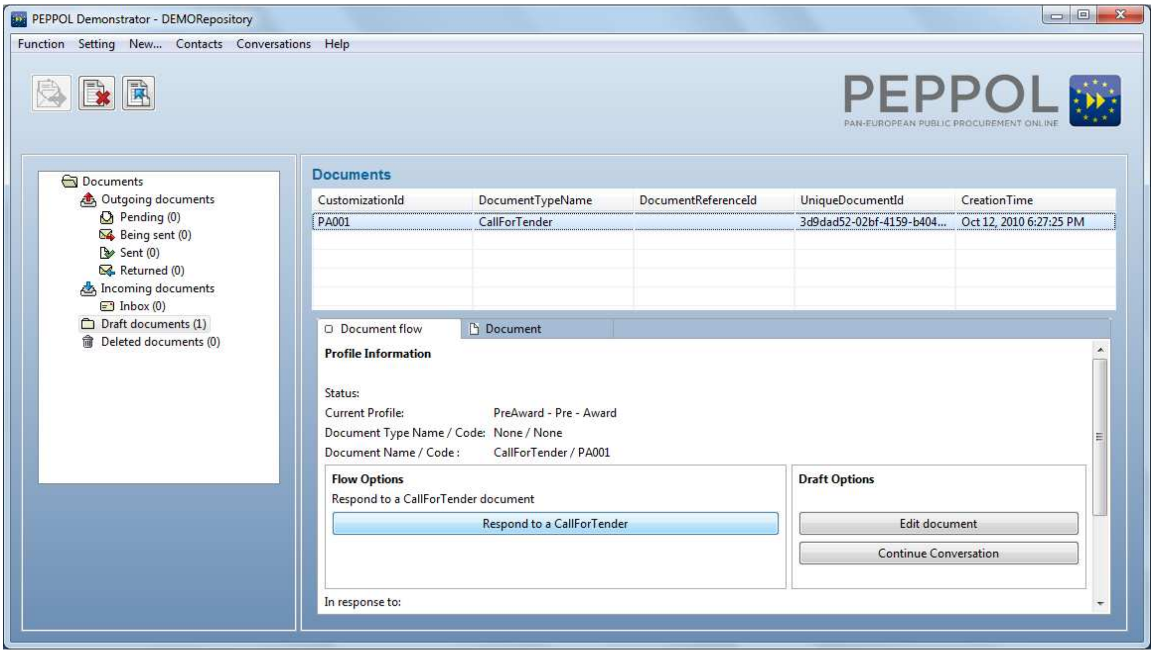

Figure 17: The Client shows the document in the Draft Folder

Press the Respond to a CallForTender option at the bottom of the interface It will allow to create a Tender document based on the imported CallForTender document. The Client will display the Tender document form.

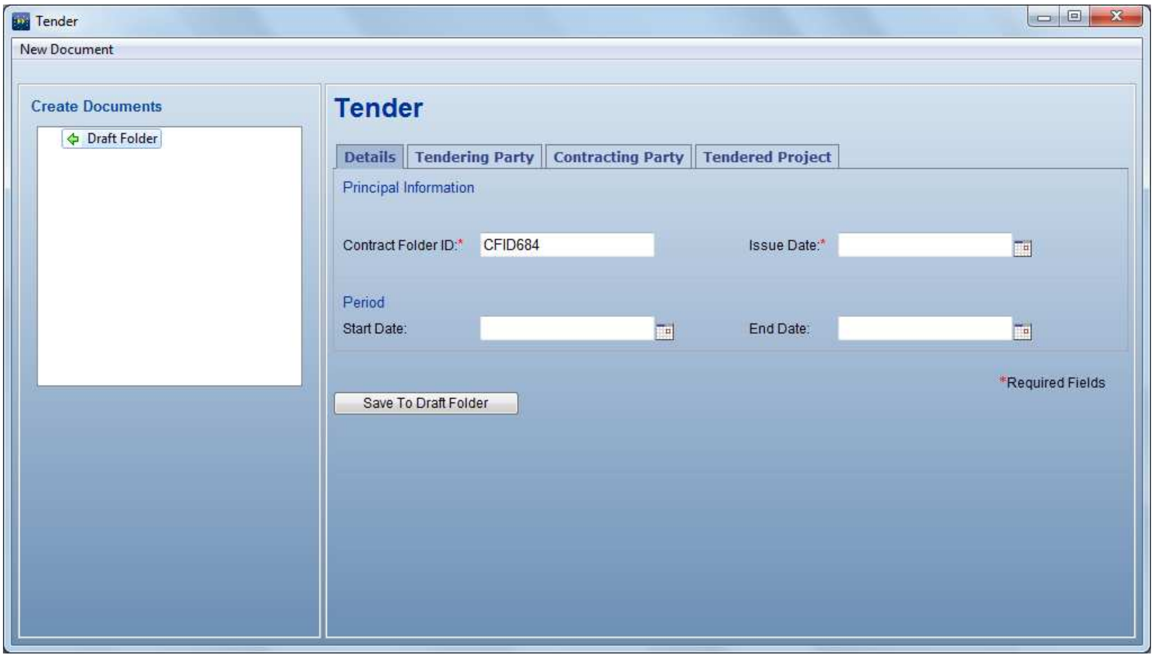

Figure 18: Detail tab form

The Tender document already includes some information taken from the CallForTender document. The **EcOp** can/must fill in the missing information.

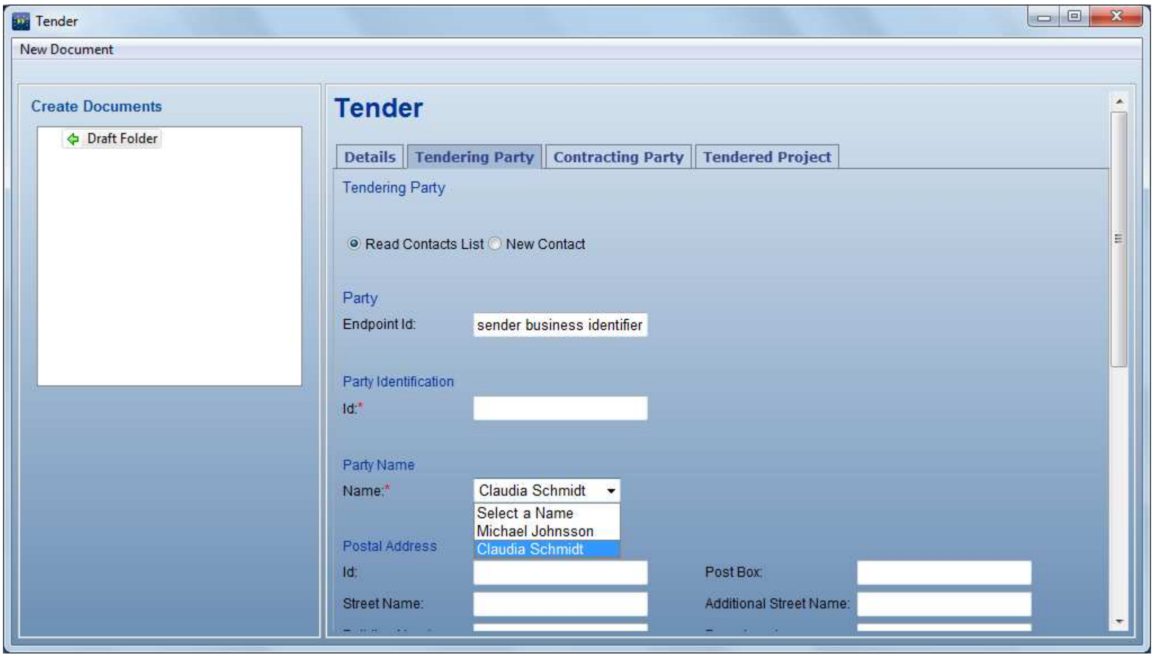

Figure 19: Tendering Party tab form

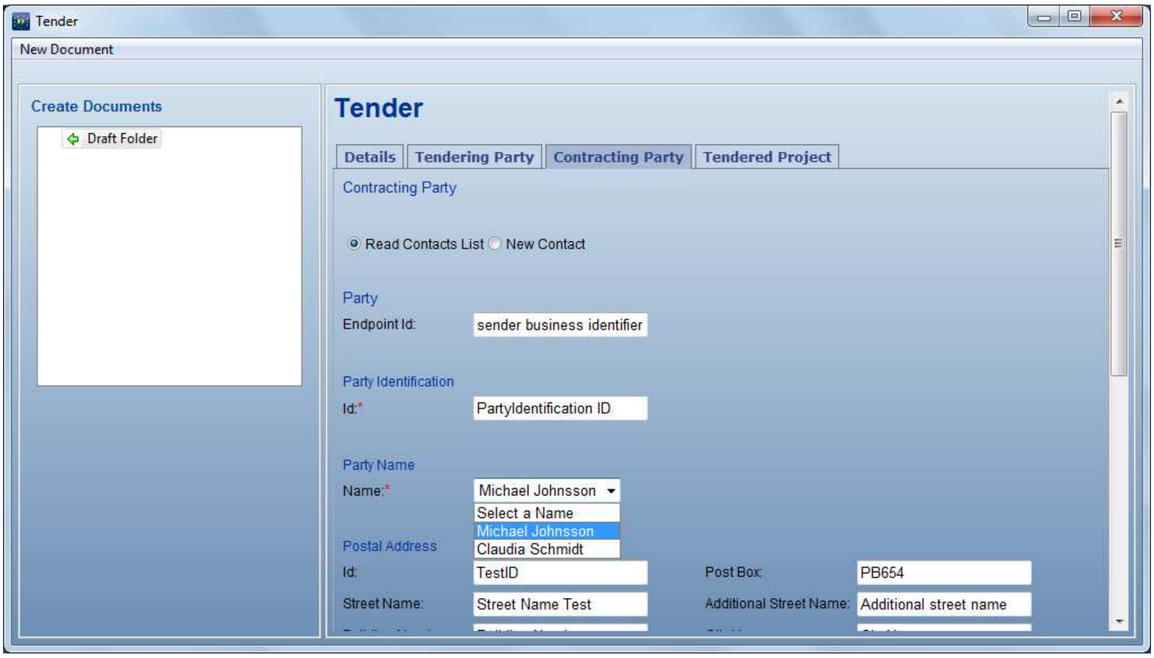

Figure 20: Contracting Party tab form

The **EcOp** can also edit the Tender Line taken from the CallForTender.

Figure 21: Tendered Project tab with Tender lines

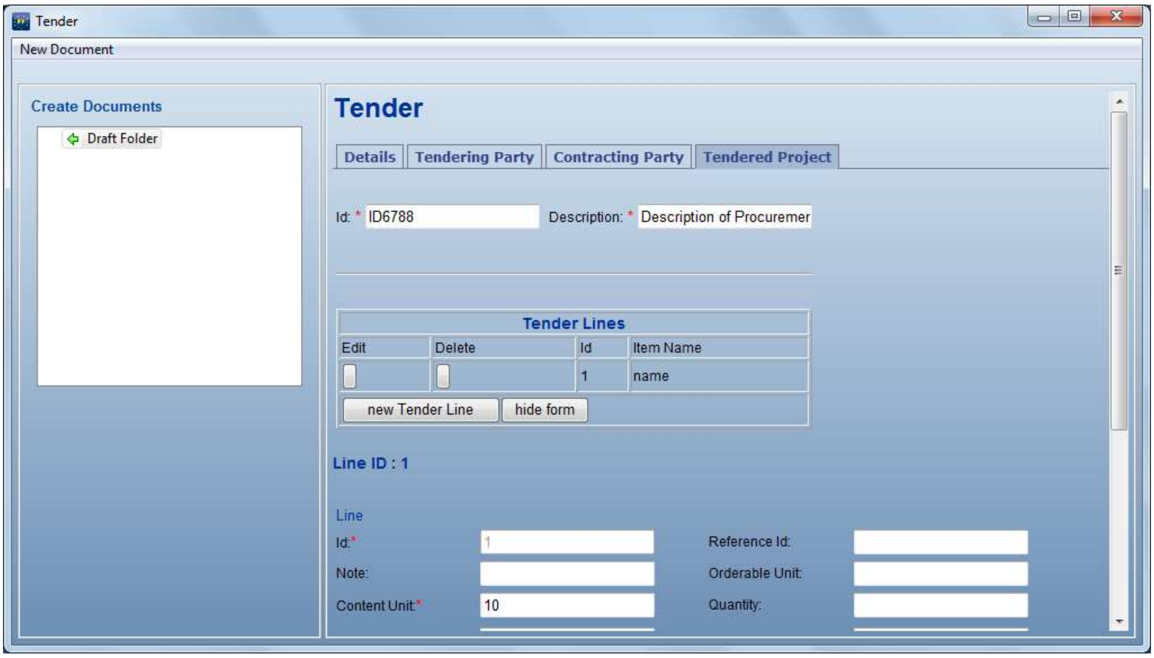

Figure 22: Editing a Tender Line

It’s also possible for The **EcOp** to create new Tender Lines.

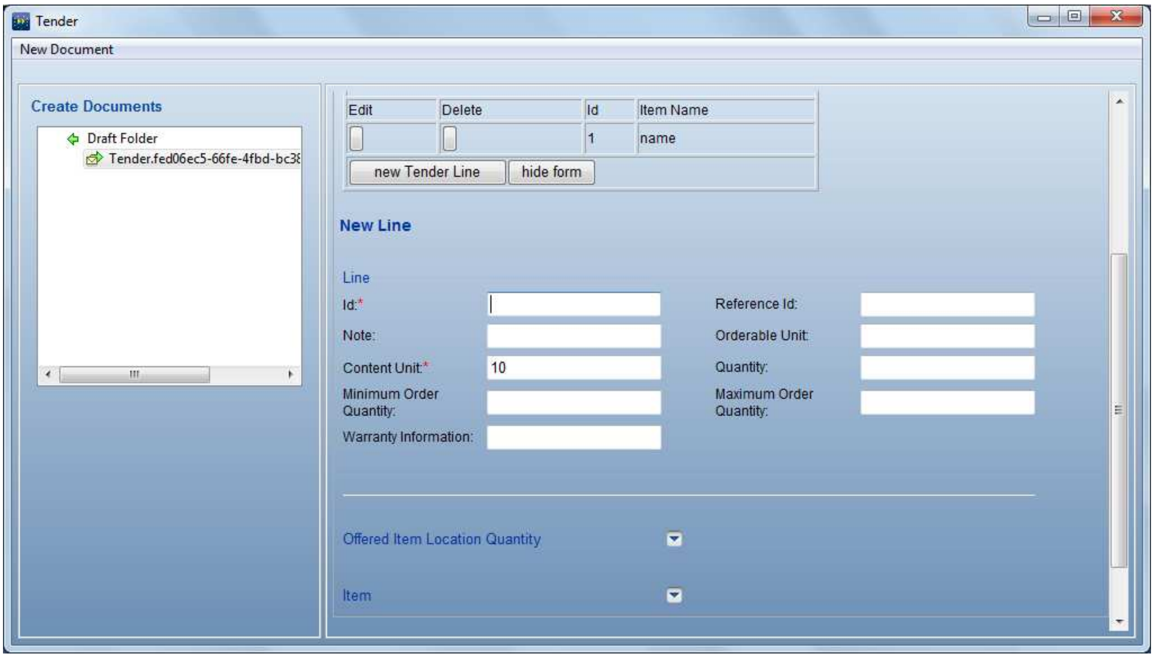

Figure 23: Creating a new Tender Line

In this case, press New Tender Line button,   and for conclusion save the whole document.

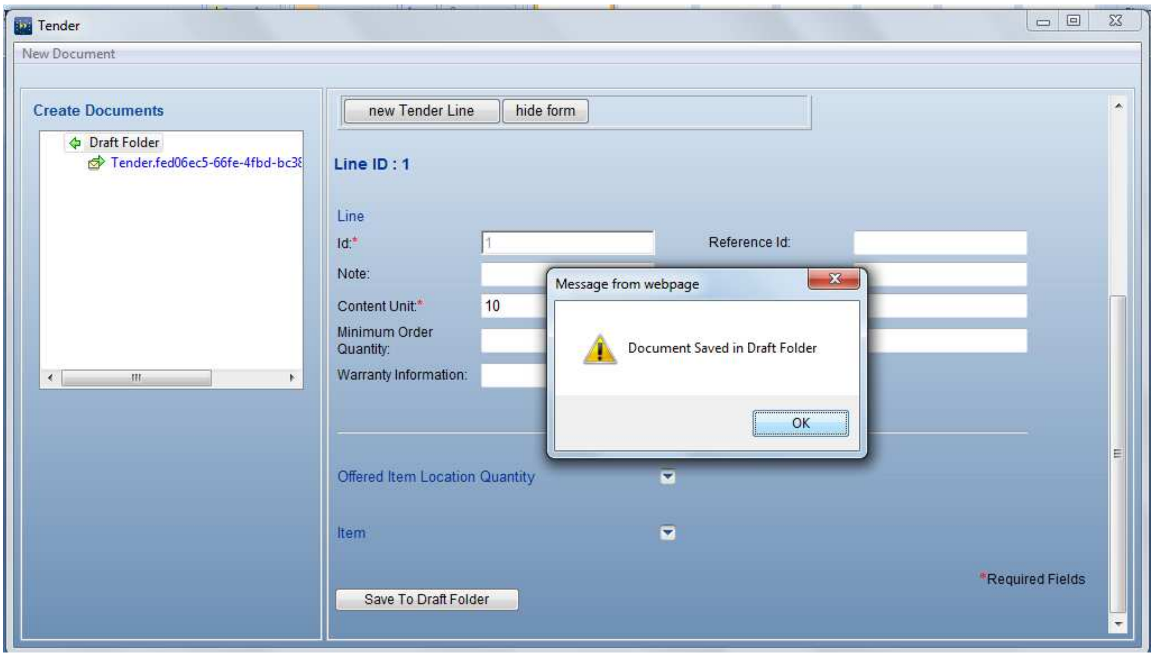

Figure 24: Saving the Tender in Draft document

4. Post - Award Phase

Economic Operator (EcOp)

In this phase, EcOp starts the transaction creating the Catalogue document

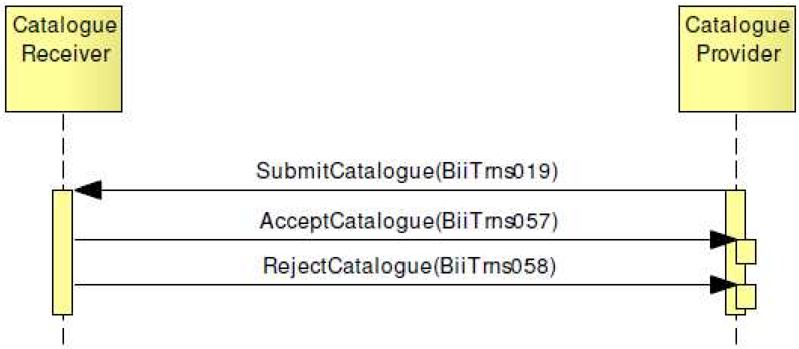

Figure 25: Graphic provided from CenBii (Bii01 Catalogue Only)

in the main menu, select the relative option to create a New Catalogue.

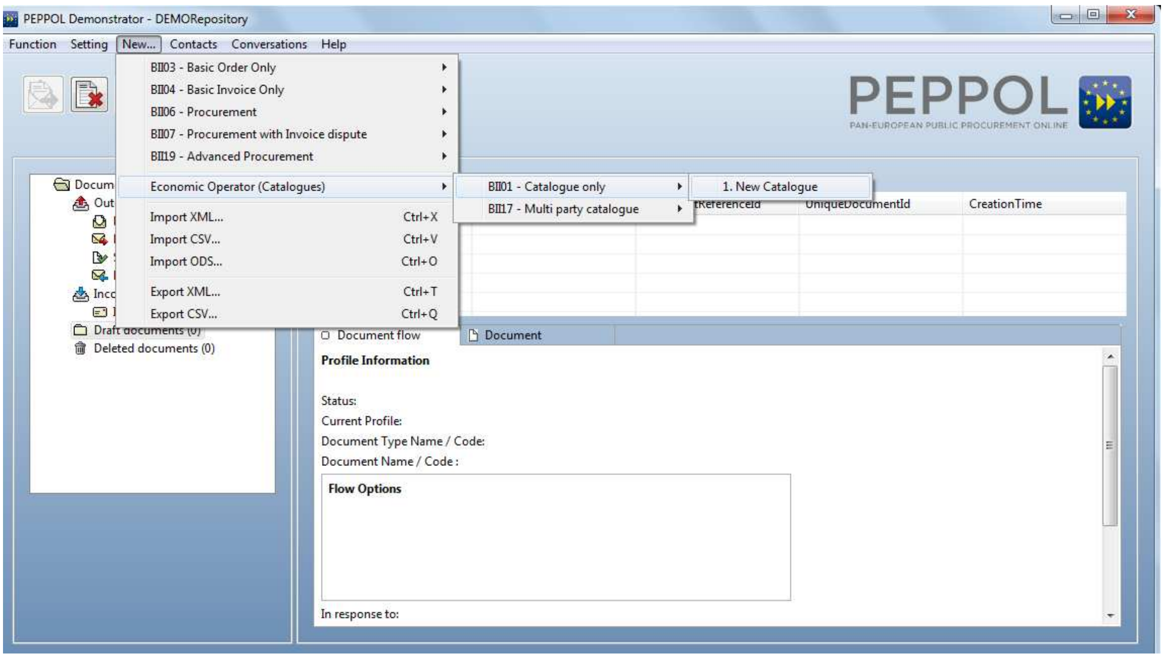

Figure 26: Selecting the New Catalogue option

Fill relevant information in the **Details**, **Provider Party** and **Receiver Party** tabs.

Note that mandatory fields are marked with *.

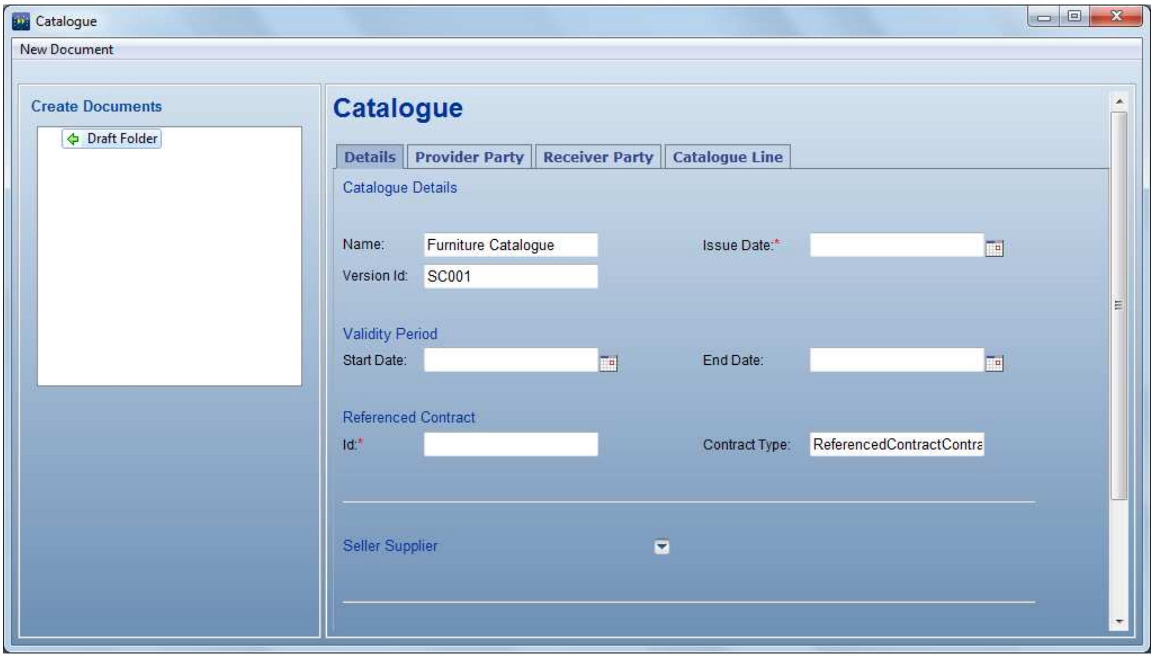

Figure 27: Detail tab form

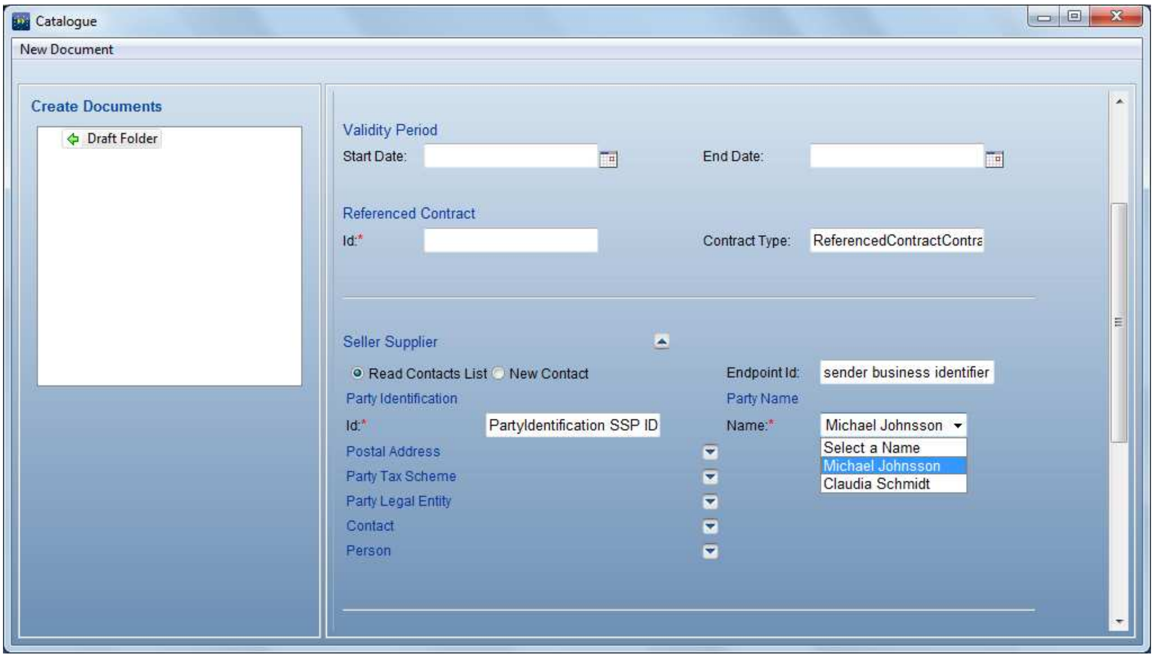

Figure 28:In Detail tab, selecting the Seller Supplier

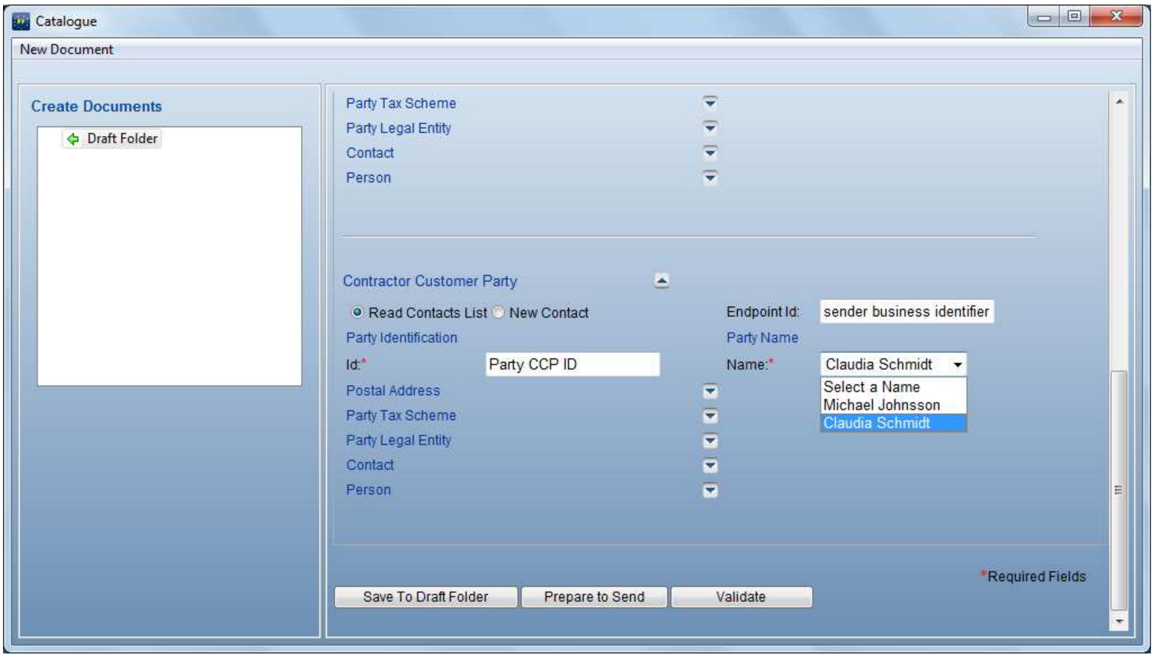

Figure 29: In Detail tab, selecting the Contractor Customer

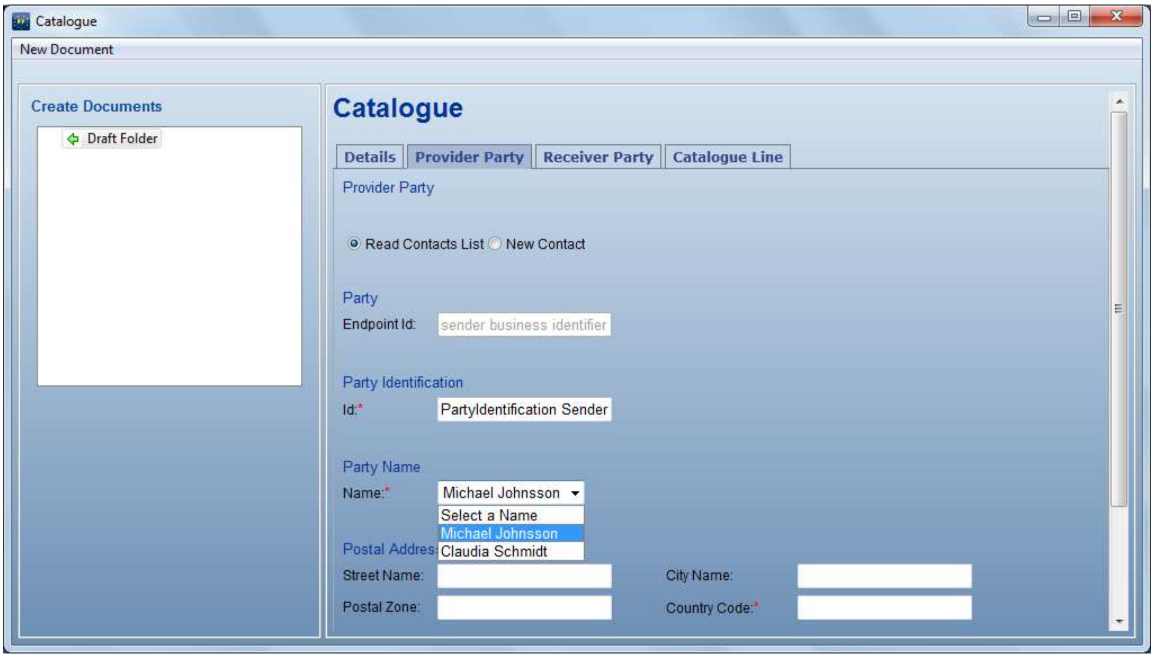

Figure 30: Provider Party tab form

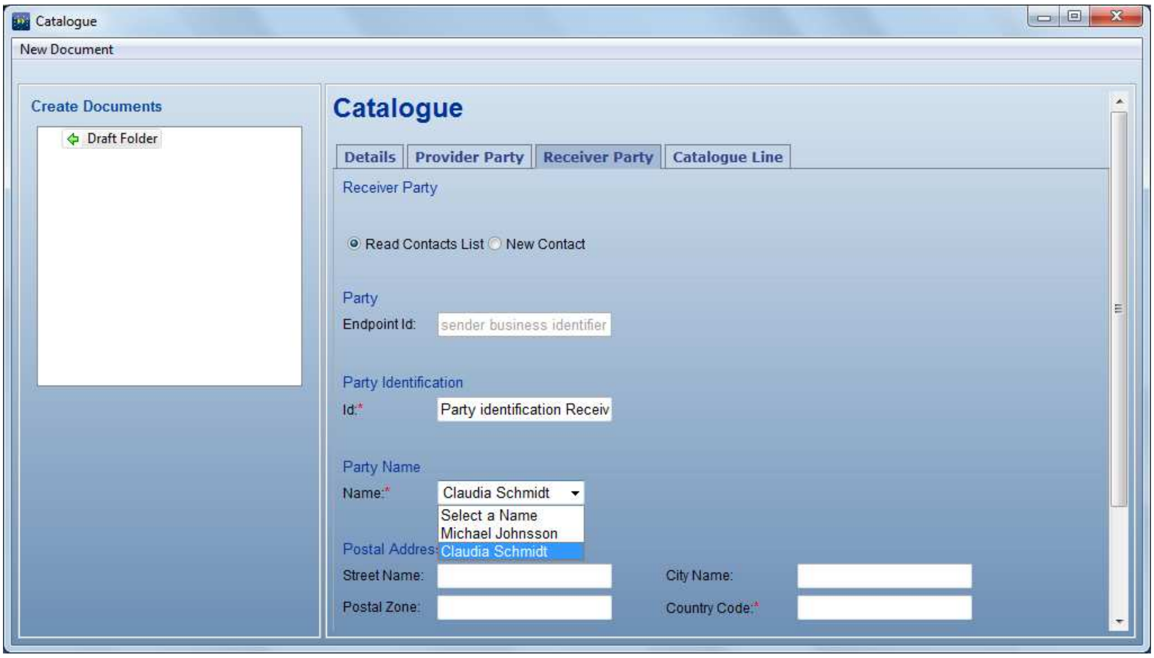

Figure 31: Receiver tab form

In Catalogue Line, press the New Line button and insert lines describing the characteristics of the products.

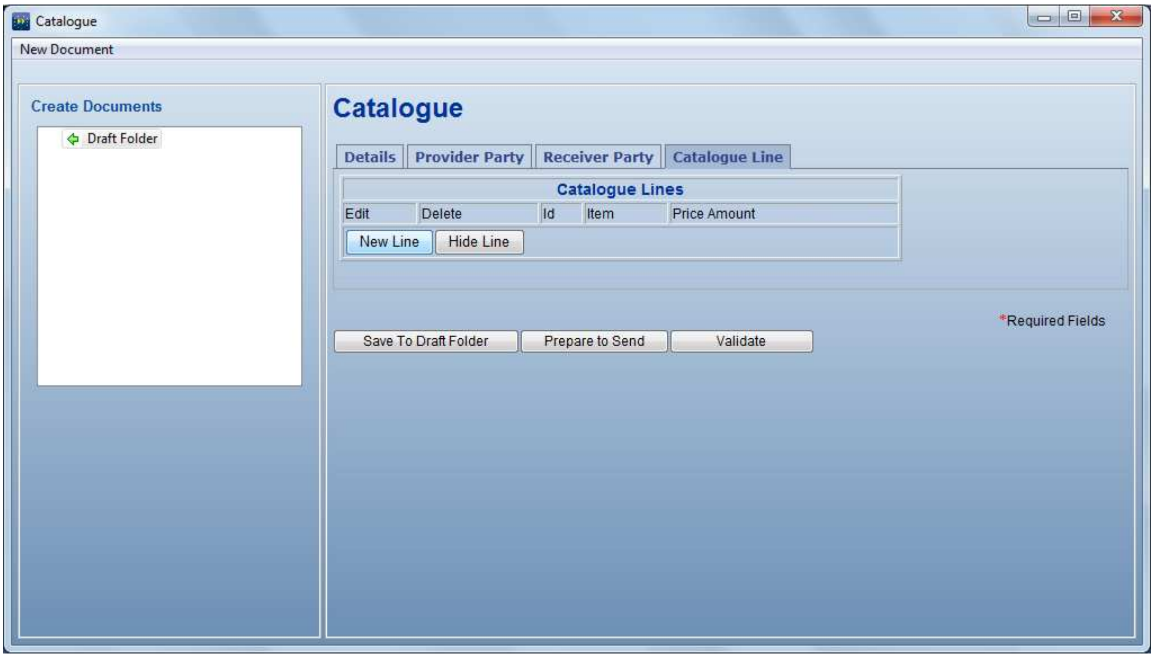

Figure 32: Empty Catalogue Line tab

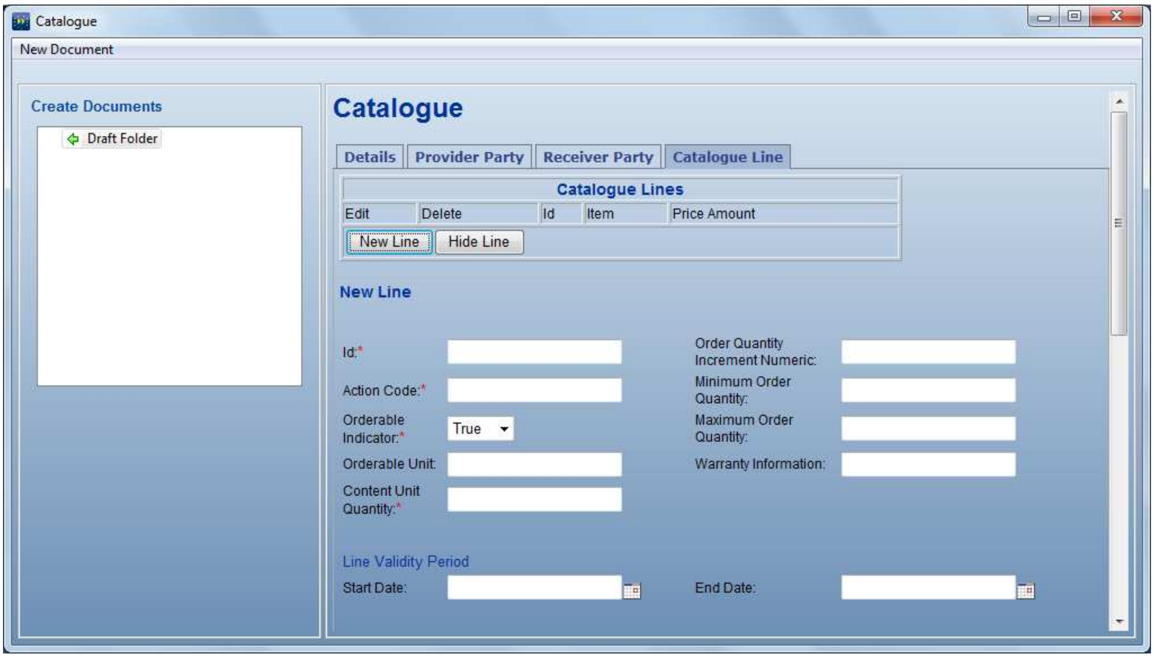

Figure 33: Catalogue Line form

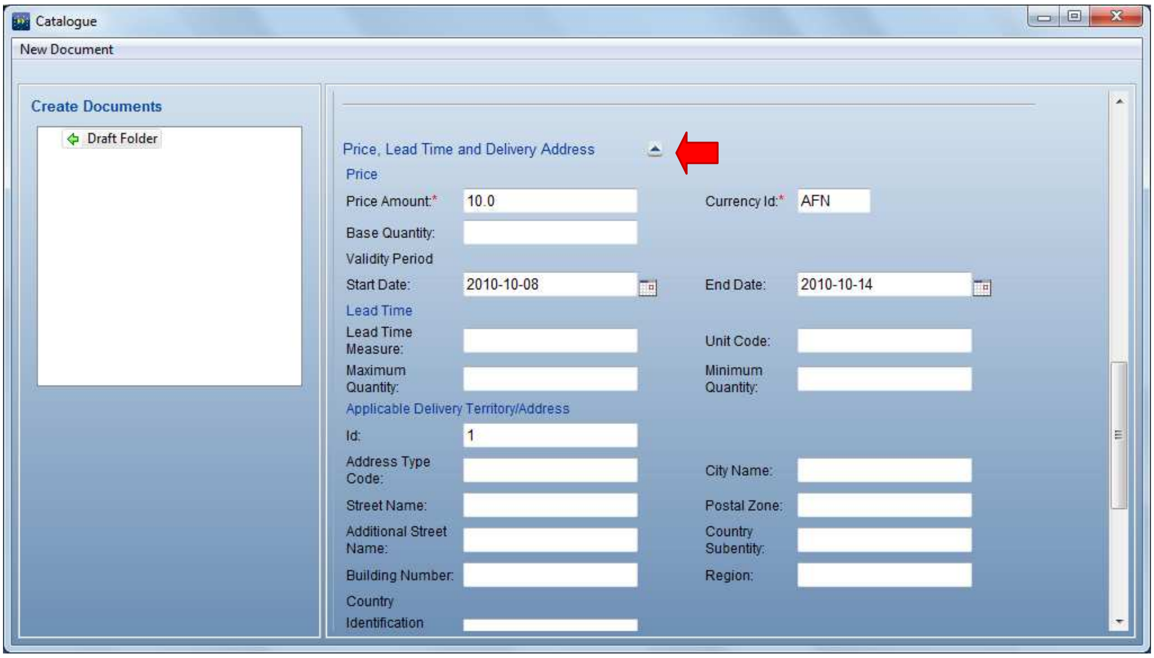

Figure 34: The client allows to contract and expand detail groups

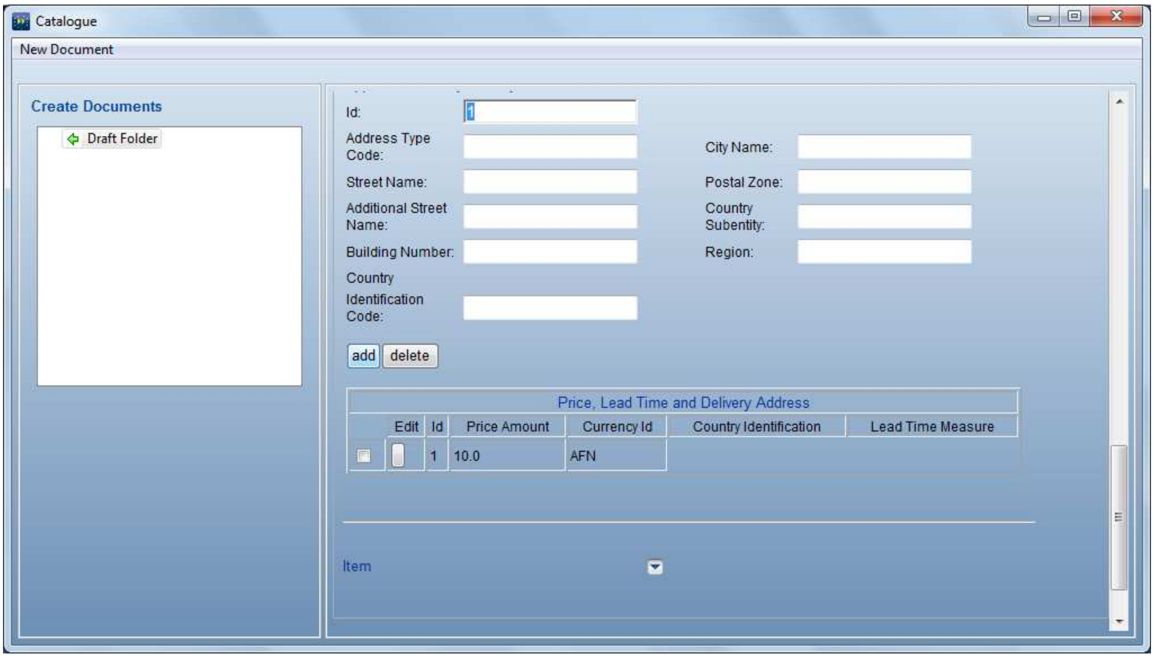

Figure 35: The Client allows to save the detail groups in a sub table

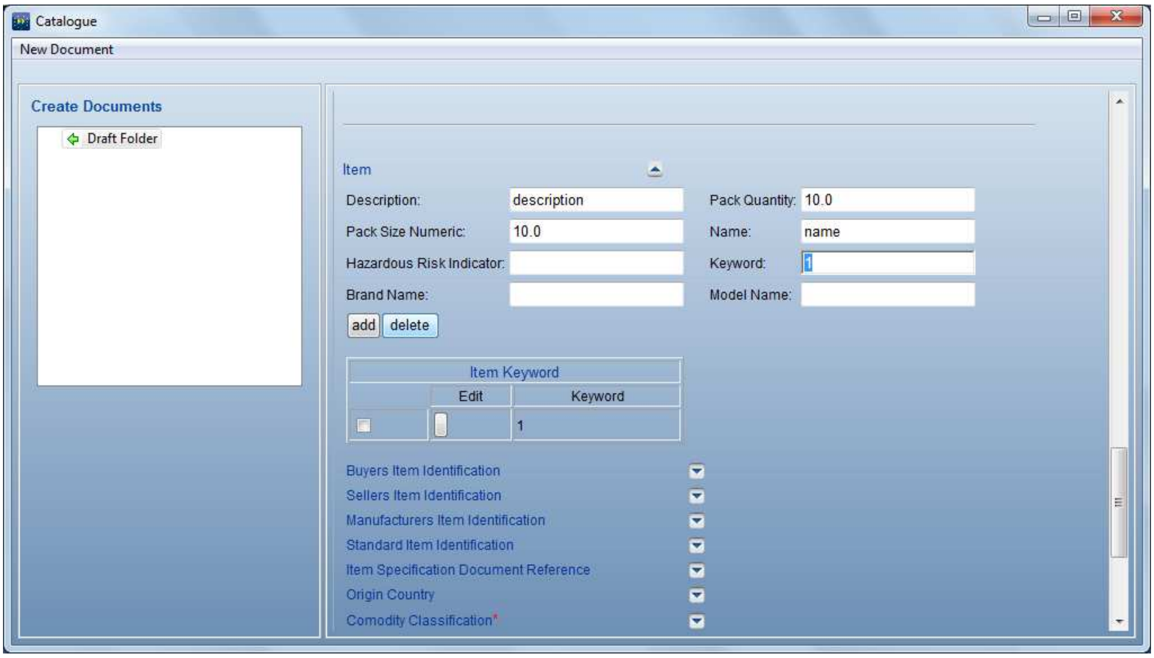

Figure 36: Working with sub tables, the Client allows to go through more details for the products

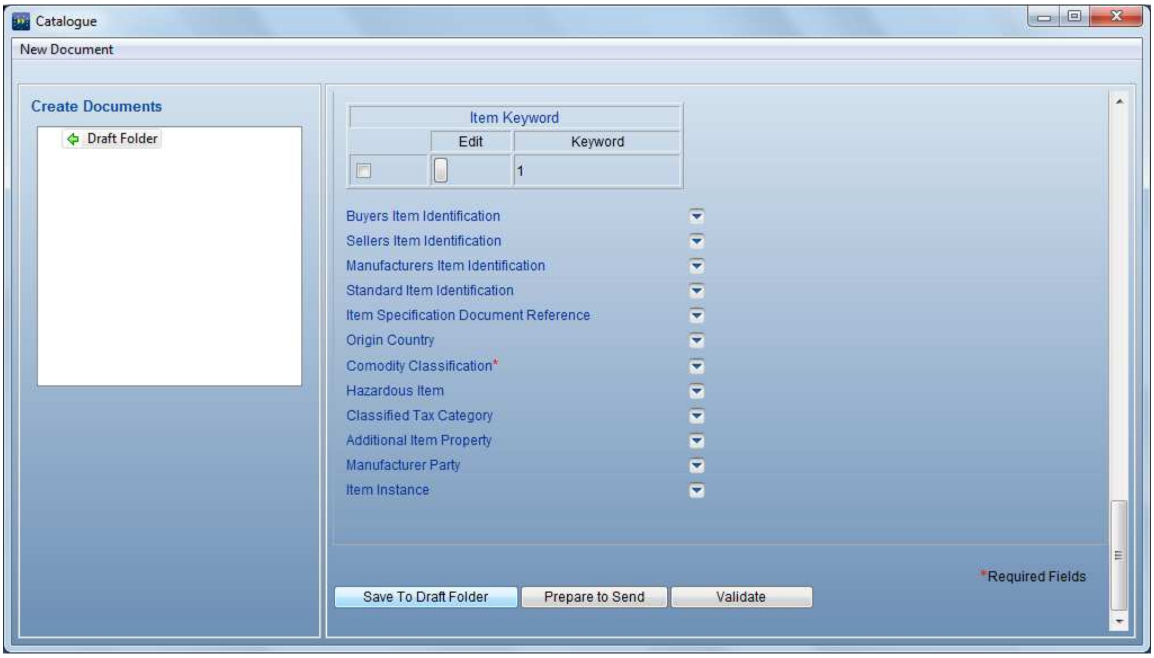

Figure 37: Details groups

Press the Save to Draft Folder to save the whole document. It can be modified later editing the information and adding or removing Catalogue Lines.

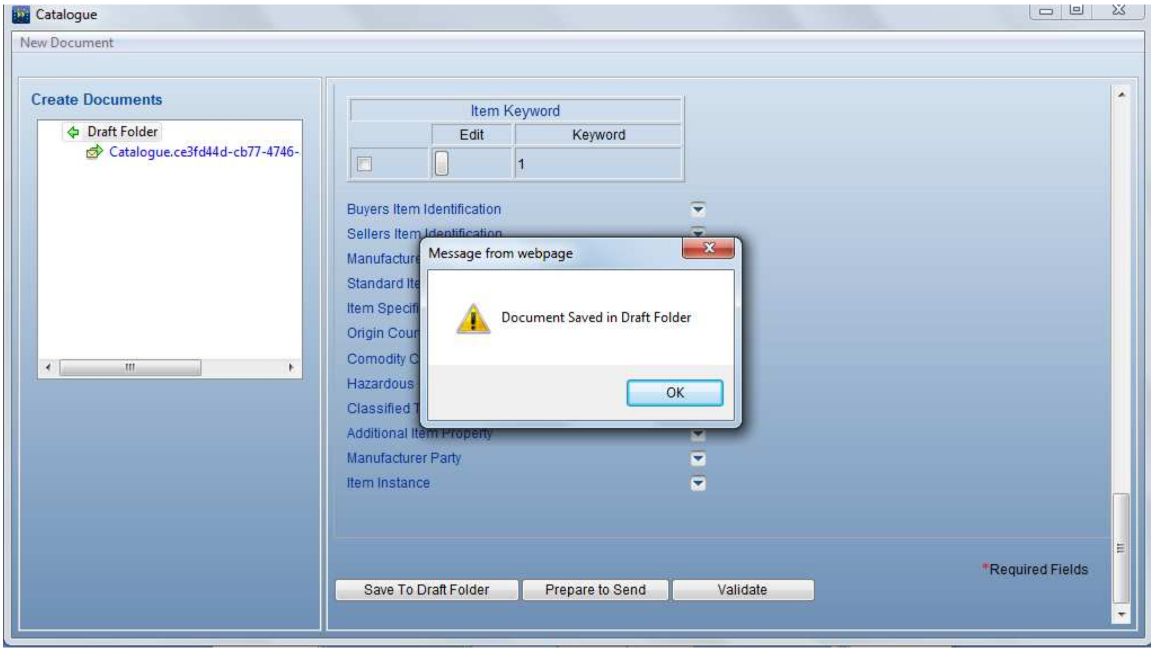

Figure 38: Saving the Catalogue in Draft Folder

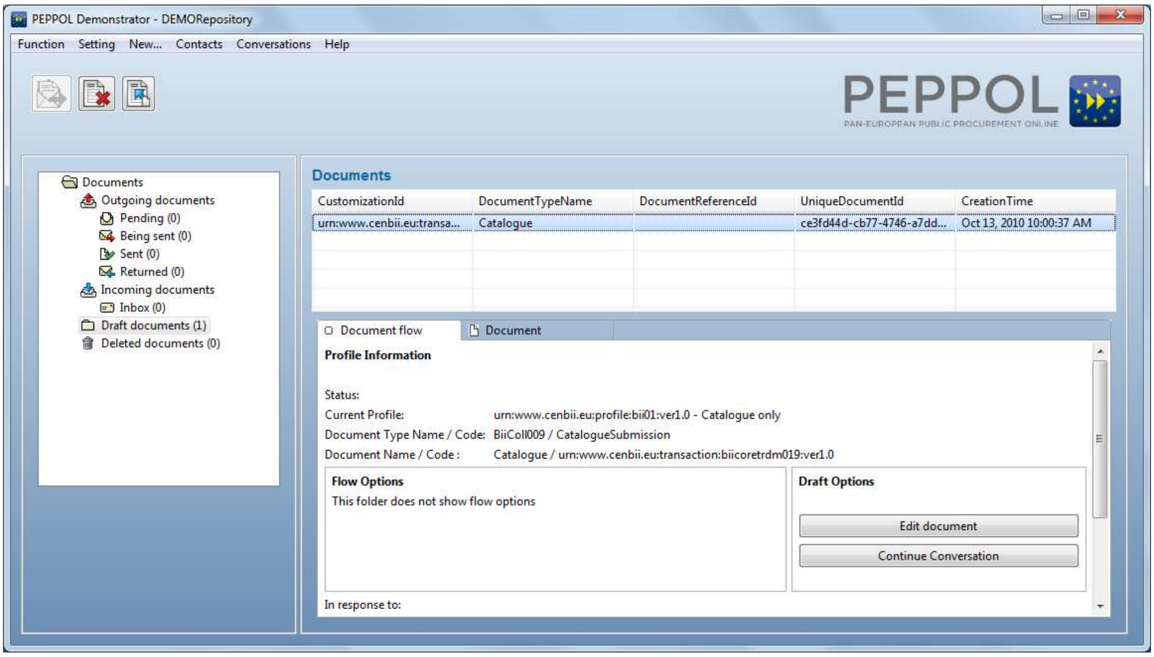

Figure 39: The Client shows the document in the Draft Folder

If the **EcOp** selects the button Prepare to Send. The document will not be editable anymore by the Client interface, and it will be moved into the Pending Documents Folder, ready to be sent.

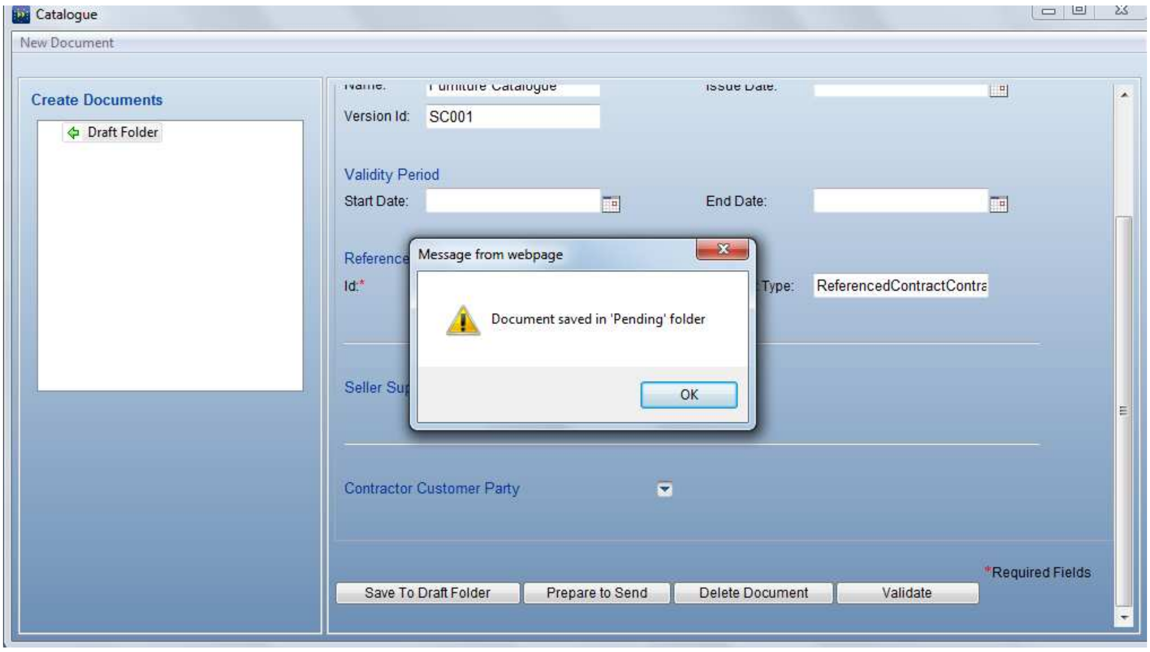

Figure 40: Saving the Catalogue in the Pending Folder

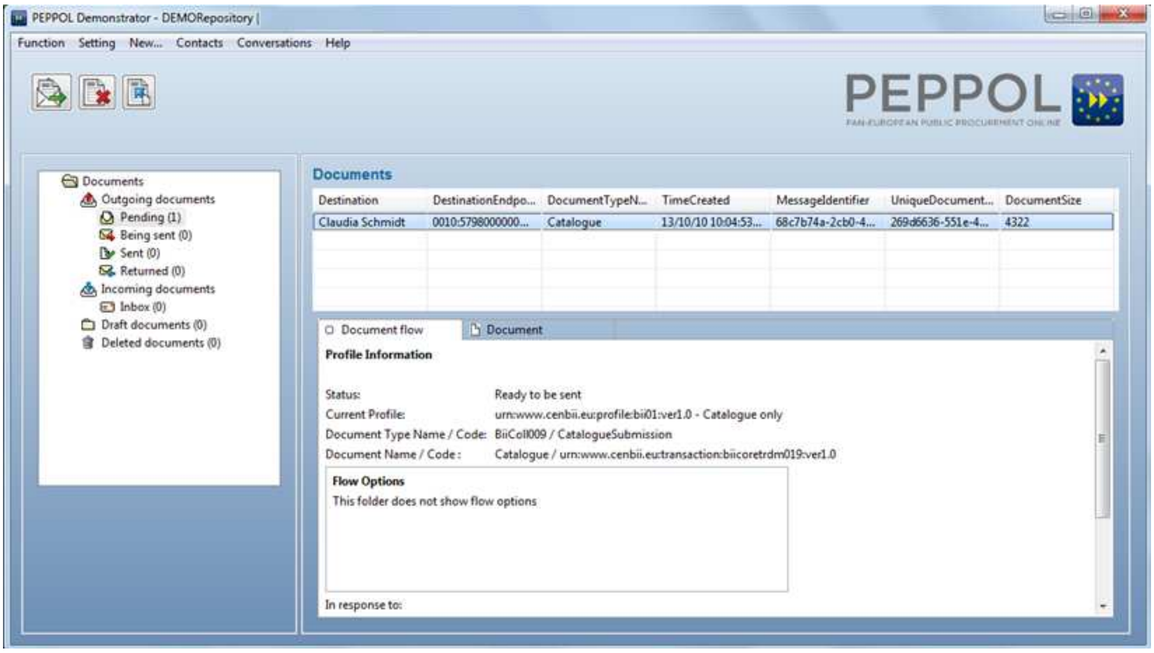

Figure 41: The Client shows the document in the Pending Folder

Now the **EcOp** is ready to send the Catalogue document to the **Ca** party. Press the Send button on the left of the main interface.

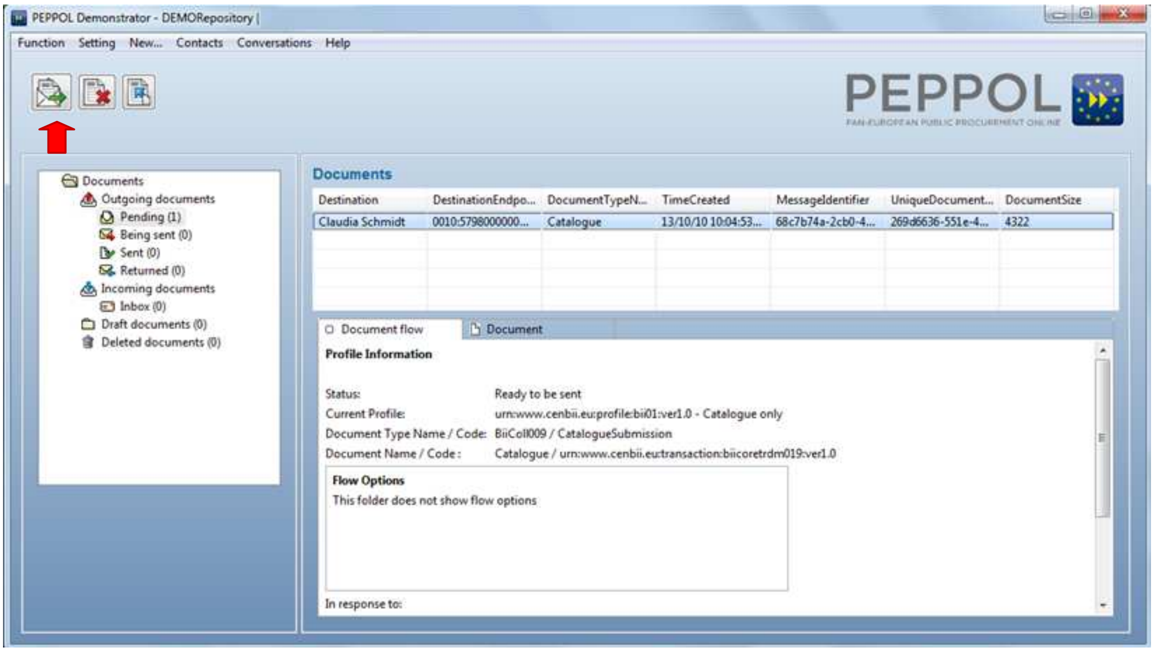

Figure 42: Pressing the Send button

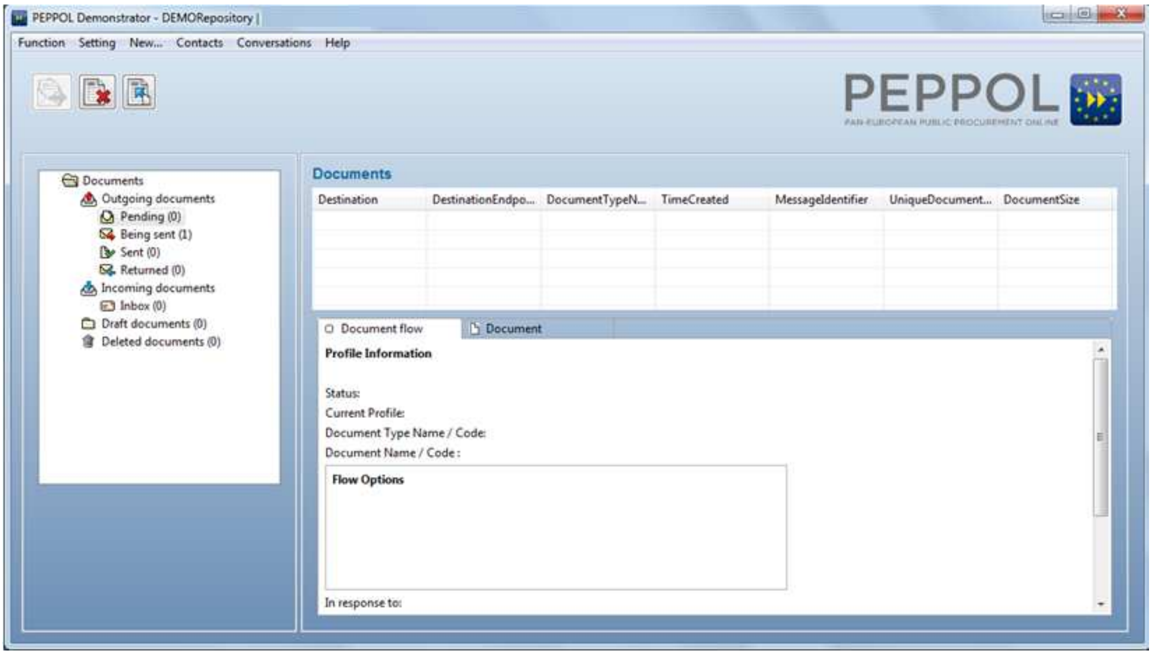

Figure 43: Document in Being Sent Folder

Once the Catalogue has been sent, the Client will be able to show the updated information and the Flow Option with the next logic steps??? (These steps are based on the Procurements of CenBii used by PEPPOL – in this case the procurement BII01 Catalogue Only).

Note that the next step of the Client is **receiving eitheran** **AcceptCatalogue** or a **RejectCatalogue** from the **Ca** party.

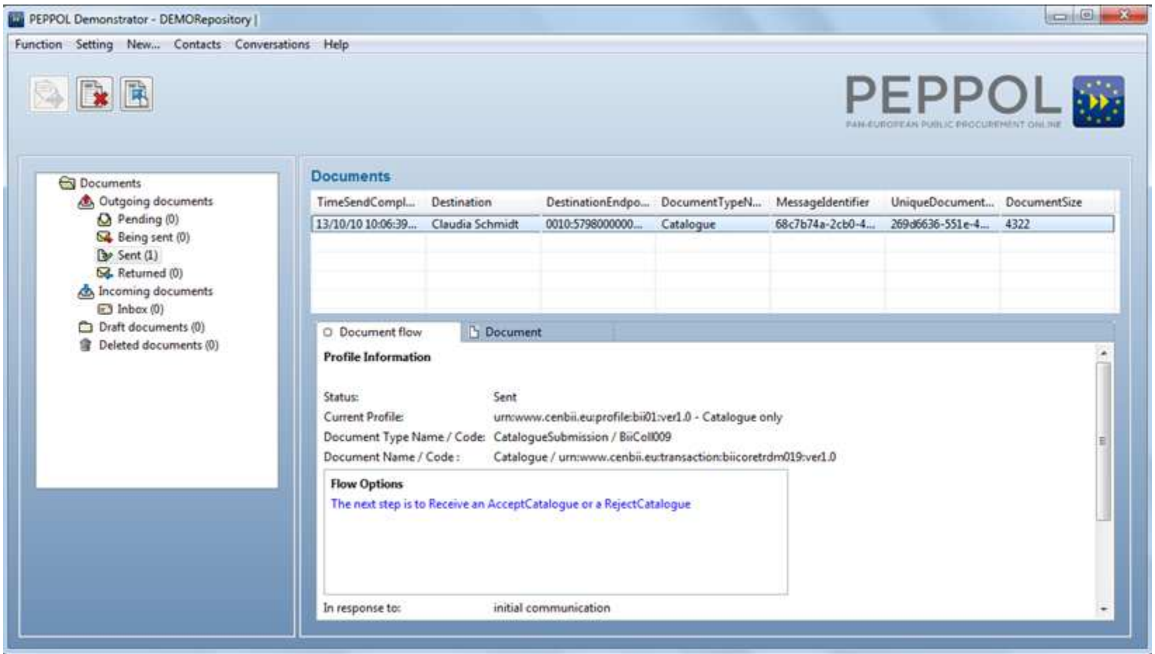

Figure 44: Document in Sent Folder

Contracting Authority (Ca)

Ca starts the transaction after receiving the Catalogue document.

The selected default tab is Document Flow, where the **Ca** can see the main information about the communication has been made so far and the options that might be following in the next steps

Select now the Document tab to see the whole document (for a good looking interface press the show button or make double click to the document so that the Client displays it in a different window).

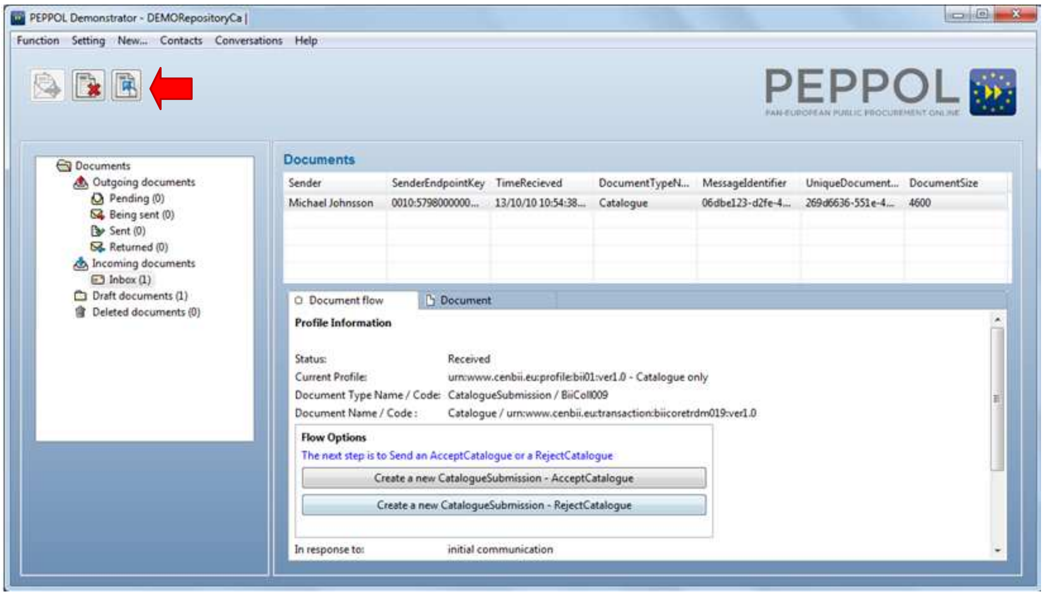

Figure 45: Pressing the Show button to display the document in a different window

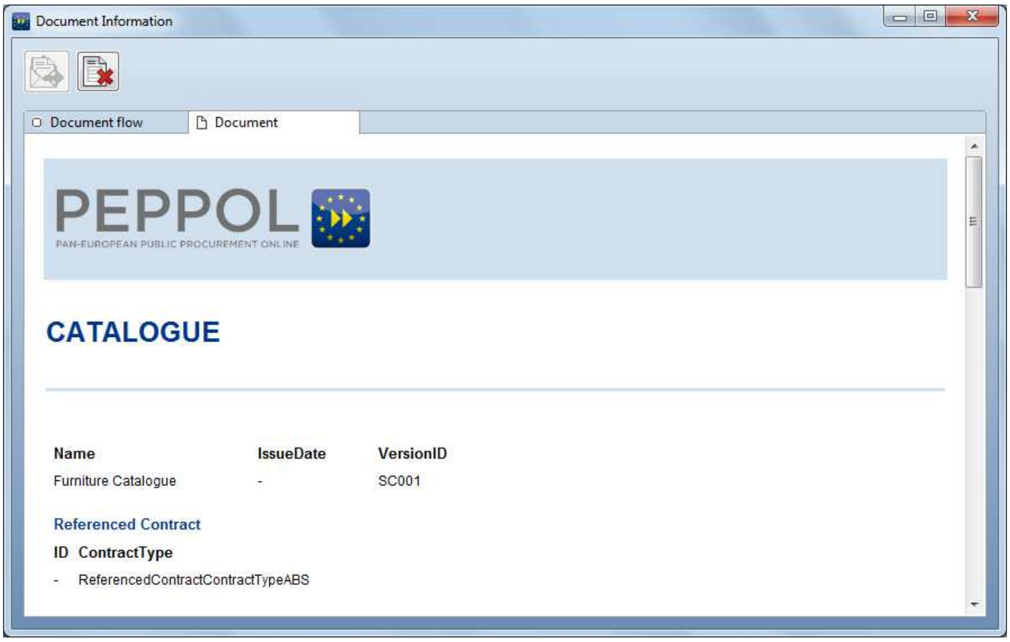

Figure 46: Displaying the document in HTML form

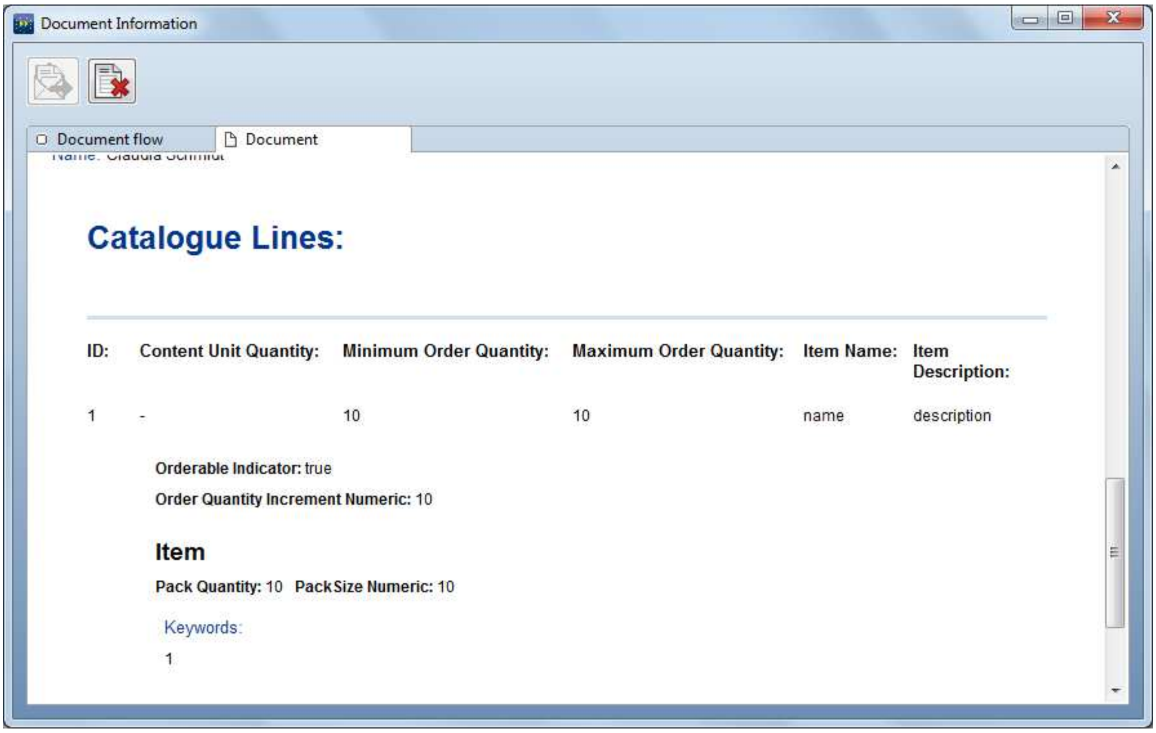

Figure 47: Displaying the document in HTML form

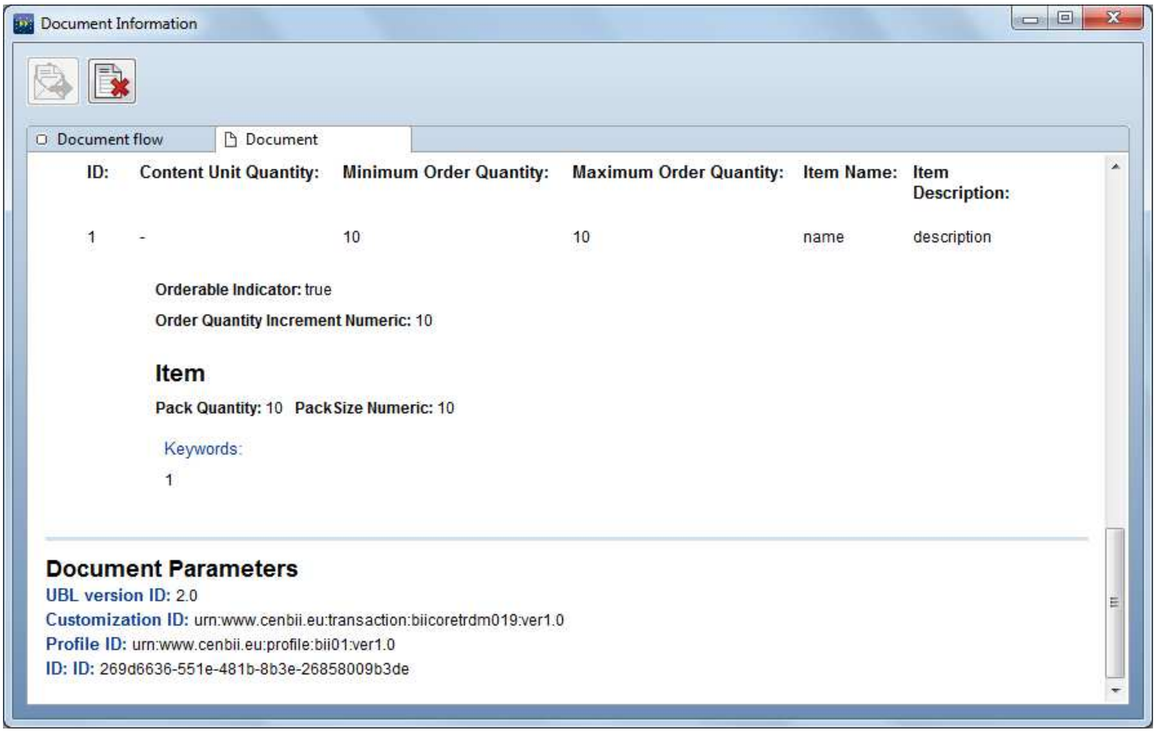

Figure 48: Displaying the document in HTML form

The next step is to **Accept** or **Reject** the received Catalogue. In this case, select **AcceptCatalogue** (the RejectCatalogue has the same proccess).

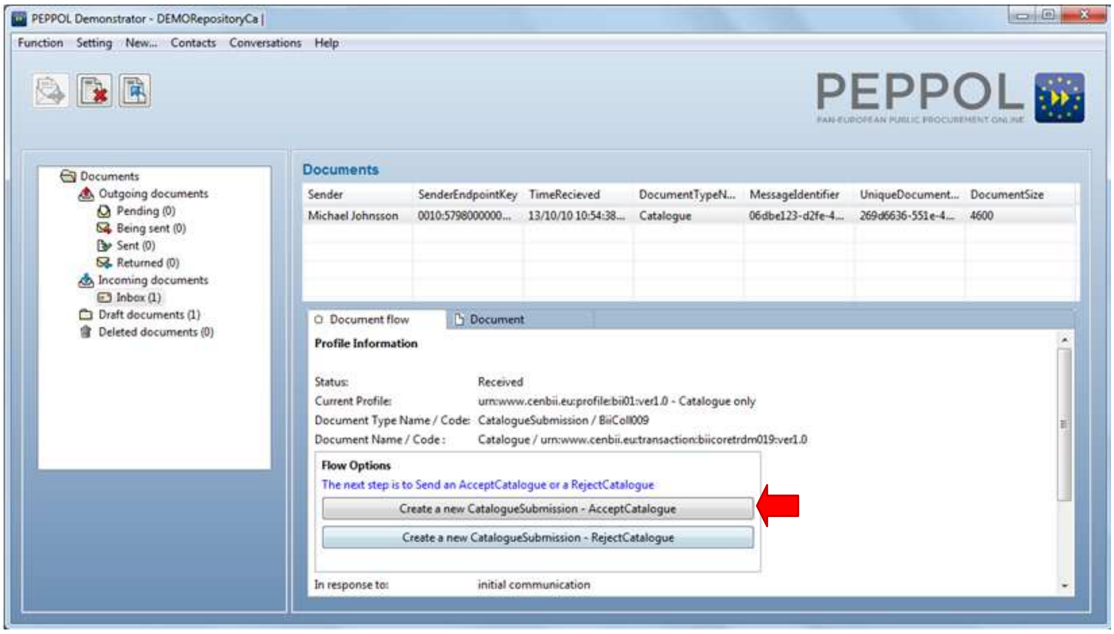

Figure 49: Creating an AcceptCatalogue to continue with the flow

The Client will display the AcceptCatalogue form. Fill the Sender and Receiver party information.

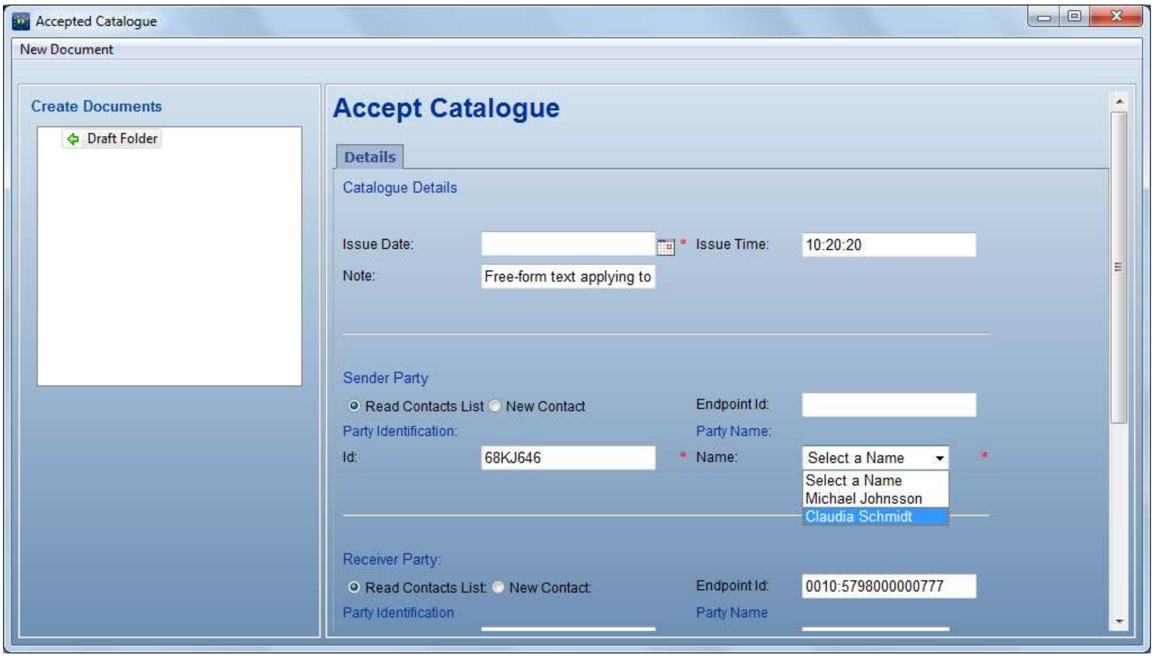

Figure 50: Selecting the Sender Party

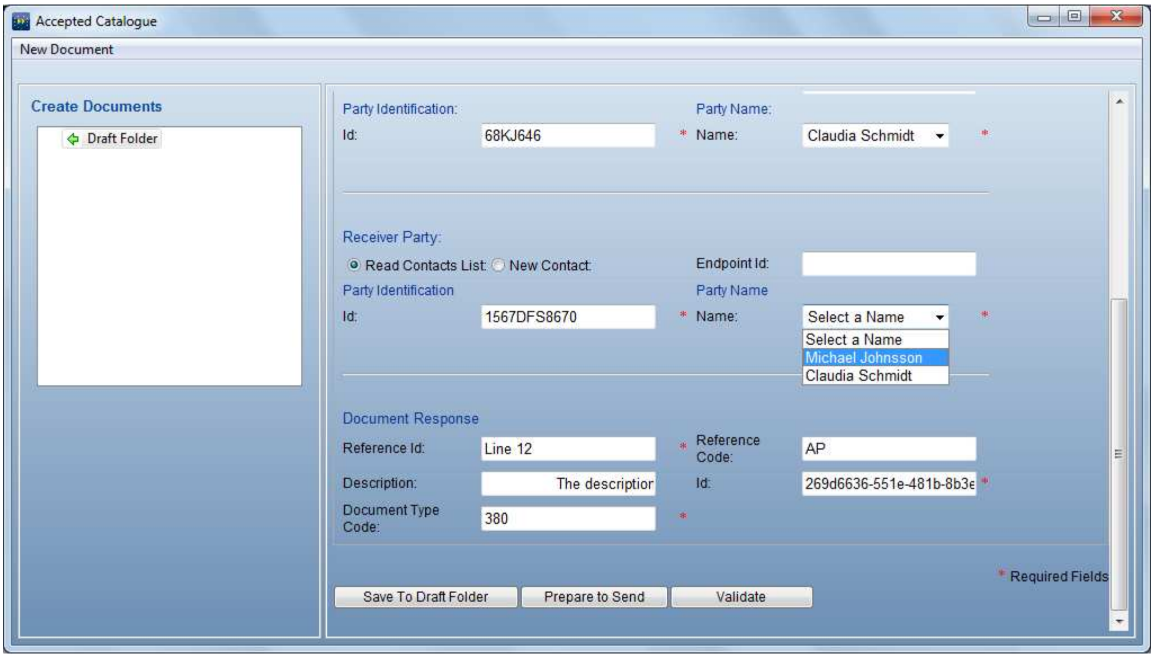

Figure 51: Selecting the Receiver Party

Press the button **Save to Draft Folder** (so it can be modified later) or **Prepare to Send** (if it is ready to send).

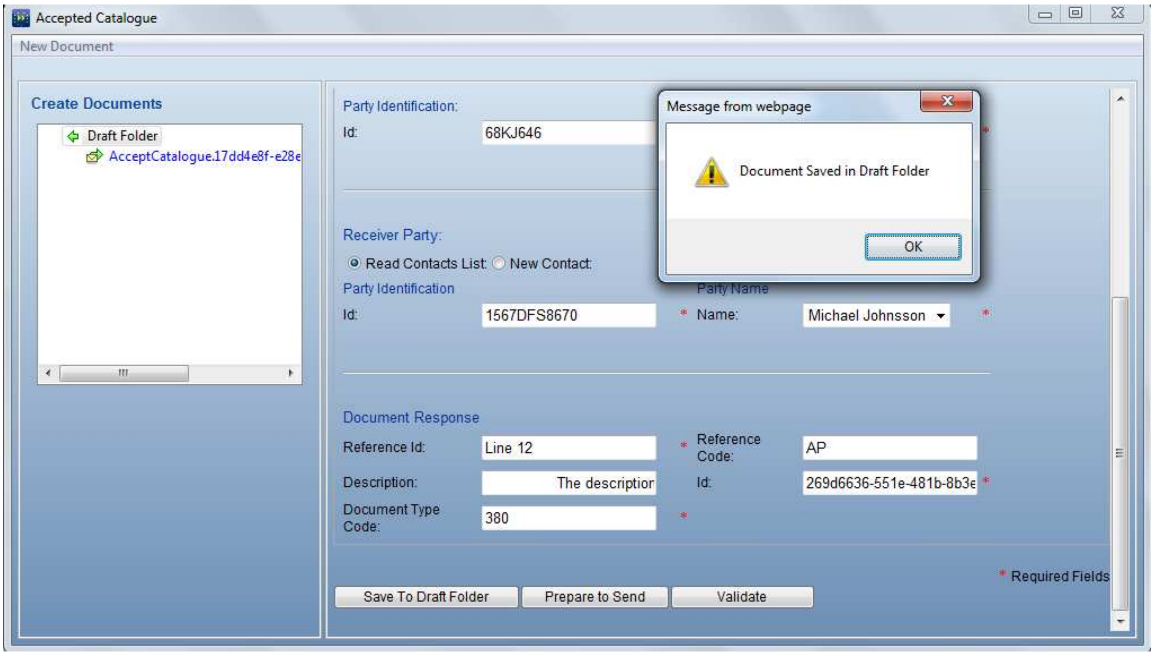

Figure 52: Saving the document in the Draft Folder

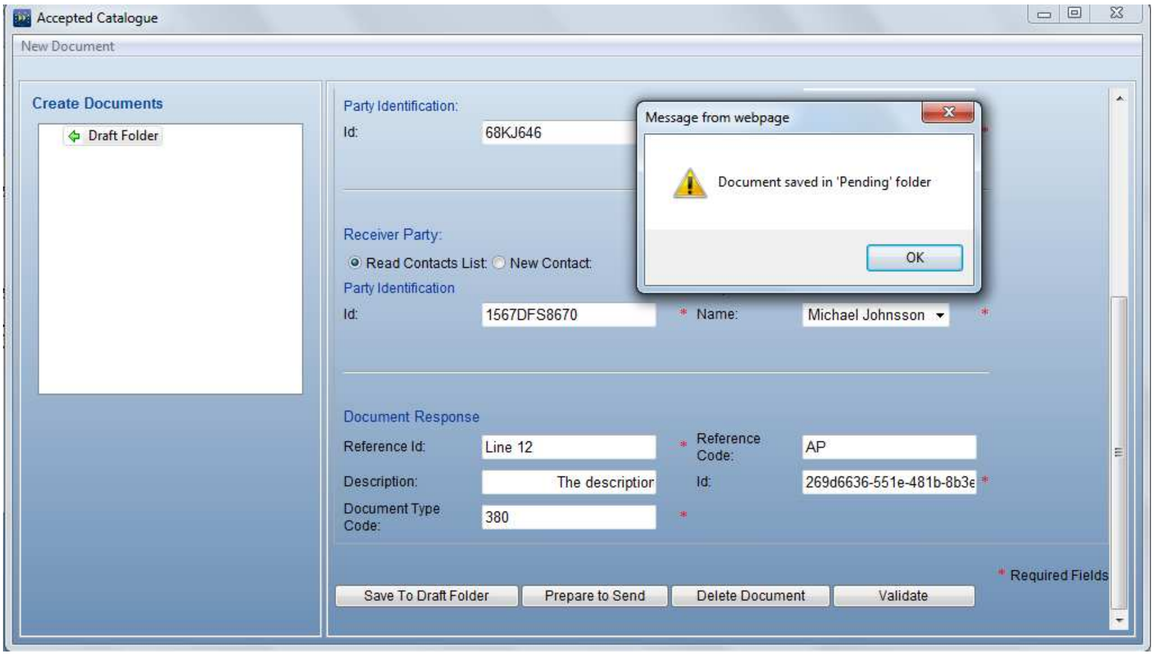

Figure 53: Saving the document in the Pending Folder

Depending on the button that was pressed, the Client will show the saved document in the corresponding folder.

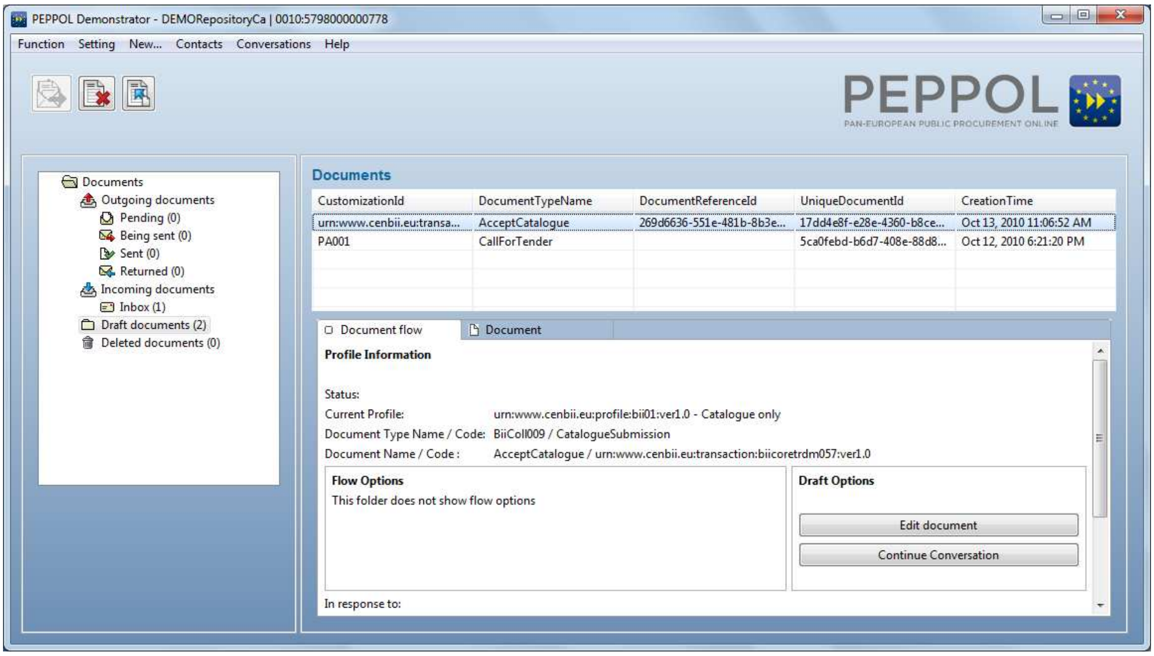

Figure 54: The Client shows the document in the Draft Folder

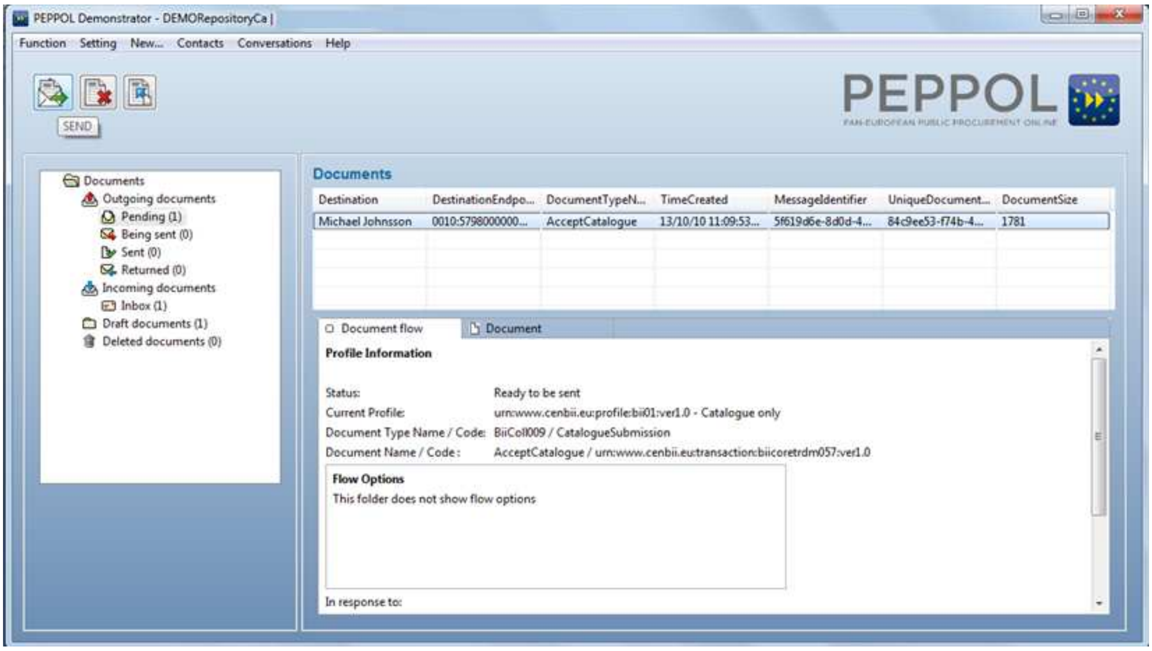

Figure 55: The Client shows the document in the Pending Folder

When the document is into the Pending folder, press the **Send** button to **respond** with an **AcceptCatalogue** to the **EcOp**, who started the communication with a **Catalogue** document.

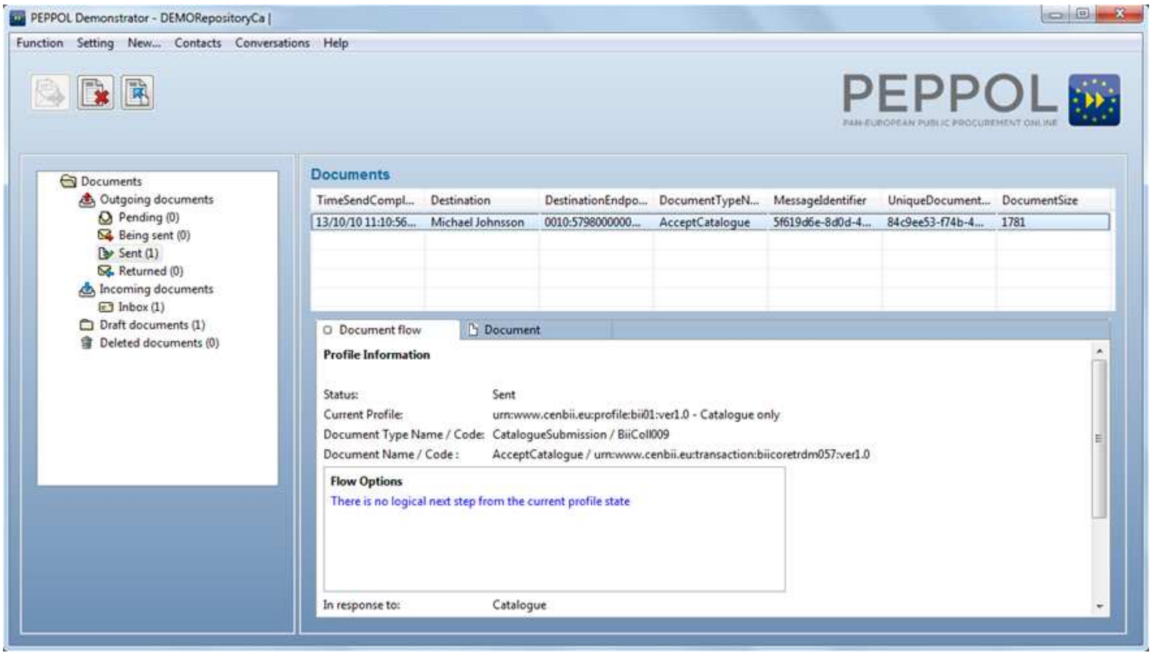

Figure 56: The document was sent and placed in the Sent Folder

Economic Operator (EcOp)

EcOp receives the response from **Ca** in its inbox Folder.

With this response, this procurement conversation has finished as the Flow Option shows.

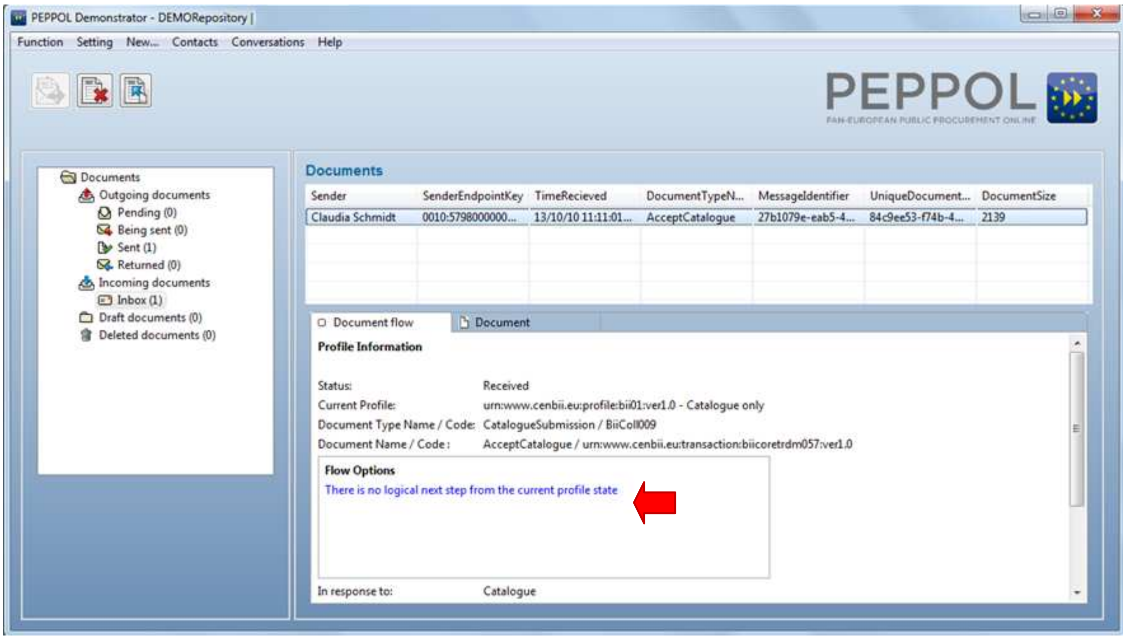

Figure 57: The EcOp received the document in Inbox Folder

The **EcOp** can now display the details of this response selecting the Document Tab.

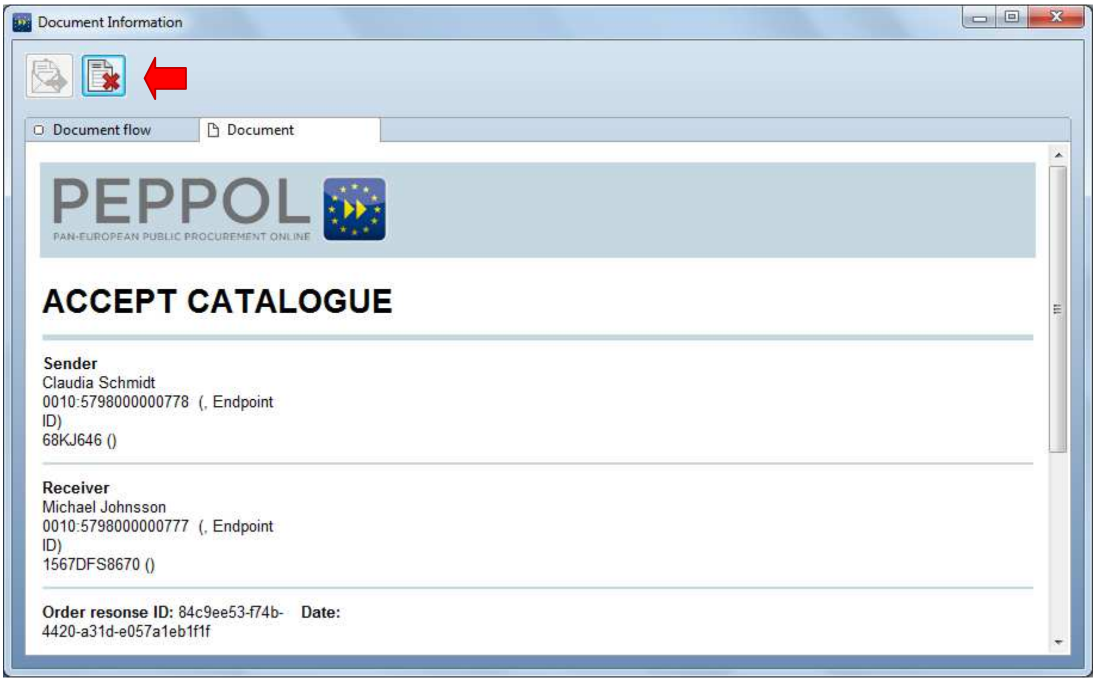

Figure 58: The Client allows to display the document in a HTML form

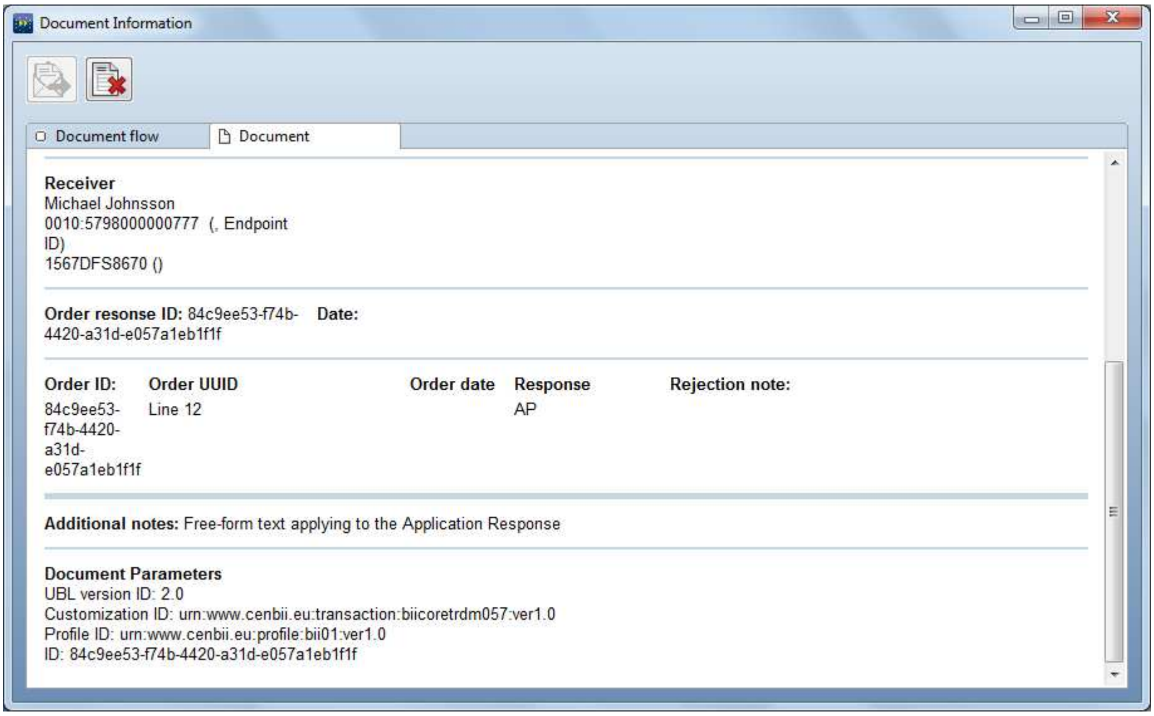

Figure 59: The Client allows to display the document in a HTML form