



PEPPOL

eCATALOGUE

MANAGEMENT TOOL

Pre-Award and Post-Award Phases

Version 1.0

PEPPOL 2011-01-01

Borderless eProcurement

Let's make it happen!



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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.

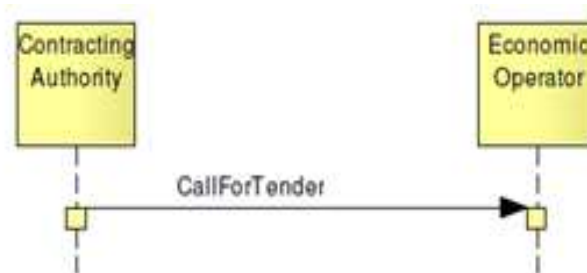


Figure 1: Graphic provided from CenBii

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

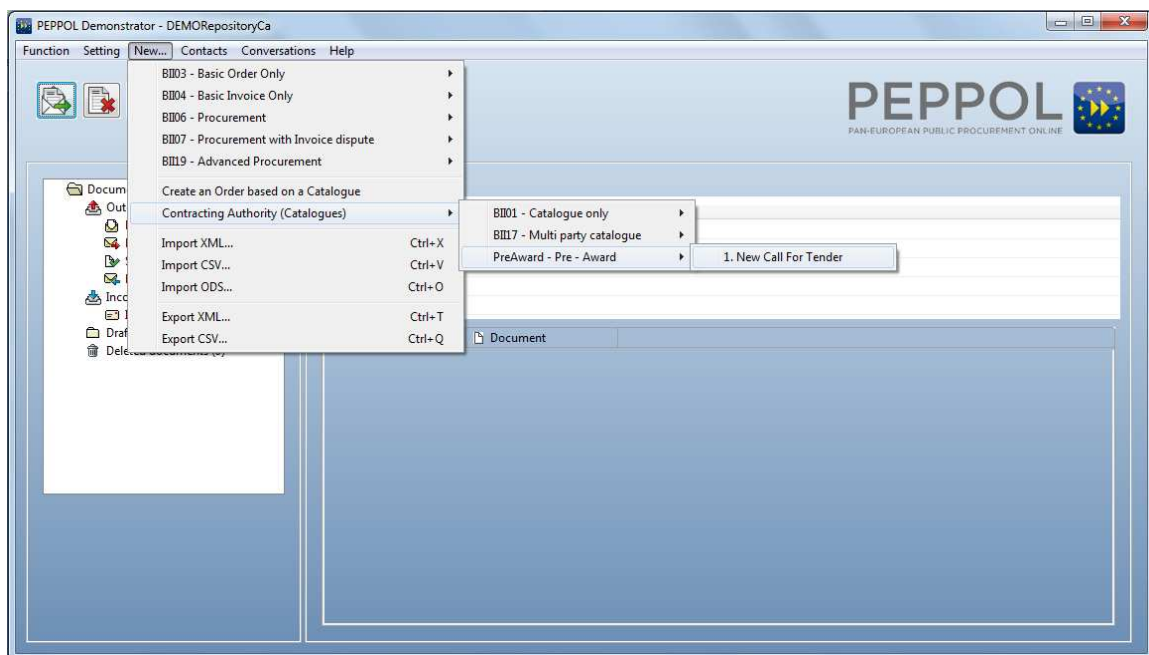


Figure 2: Selecting the New CallForTender option

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

Note that mandatory fields are marked with *.

The screenshot shows a web application window titled 'Call For Tender'. On the left, there is a sidebar with a 'New Document' section containing a 'Draft Folder' button. The main area is titled 'Call For Tender' and has three tabs: 'Details' (selected), 'Customer Party', and 'Procurement Project'. Under the 'Details' tab, there are three sections: 'Principal Information' with fields for 'Contract Folder ID' (containing 'CFID684') and 'Issue Date'; 'Tendering Terms' with a 'Note' field containing 'This is the note for the doc'; and 'Tendering Process' with a 'Process Type' dropdown menu set to 'Tendering Process type'. At the bottom left is a 'Save To Draft Folder' button, and at the bottom right is a legend indicating that a red asterisk (*) denotes 'Required Fields'.

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).

Call For Tender

New Document

Create Documents

 Draft Folder

Call For Tender

Details Customer Party Procurement Project

Customer Party

☒ Read Contacts List ☐ New Contact

Party

Endpoint Id: sender business identifier

Party Identification

Id.* PartyIdentification ID

Party Name

Name.* Michael Johnsson

Select a Name

Michael Johnsson

Claudia Schmidt

Postal Address

Id: TestID

Post Box: PB654

Street Name: Street Name Test

Additional Street Name: Additional street name

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.

The screenshot shows a web application window titled 'Call For Tender'. On the left, there is a 'Create Documents' sidebar with a 'Draft Folder' button. The main area has three tabs: 'Details', 'Customer Party', and 'Procurement Project', with the last one being active. Below the tabs, there are two input fields: 'Id: * ID6788' and 'Description: * Description of Procurement'. Below these is a 'Tender Lines' section containing a table with columns 'Edit', 'Delete', 'Id', and 'Item Name'. Under the table are two buttons: 'new Tender Line' and 'hide form'. At the bottom left of the main area is a 'Save To Draft Folder' button. At the bottom right, there is a note: '*Required Fields'.

Figure 5: Procurement Project tab form

This screenshot shows the same 'Call For Tender' form as Figure 5, but with the 'new Tender Line' button pressed. The 'Tender Lines' table is still visible. Below it, a 'New Line' form is displayed. This form has two columns of input fields. The left column is for 'Tender Line' and includes fields for 'Id: *', 'Quantity:', 'Maximum Tax Inclusive Amount:', and 'Note:'. The right column is for 'Maximum Tax Exclusive Amount:' and includes a field for 'Maximum Tax Exclusive Amount:'. The 'Note:' field is currently empty.

Figure 6: Pressing the New Request for Tender Line button

Call For Tender

New Document

Create Documents

Draft Folder

New Line

Tender Line

Id:*

Quantity:

Maximum Tax Inclusive Amount:

Note:

Maximum Tax Exclusive Amount:

Item

Description:

Pack Quantity:

Pack Size Numeric:

Name:

Commodity Classification

Additional Item Property

Save To Draft Folder

*Required Fields

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

Call For Tender

New Document

Create Documents

Draft Folder

CallForTender.5ca0febd-b6d7-40

New Line

Tender Line

Id:*

Quantity:

Maximum Tax Inclusive Amount:

Note:

Maximum Tax Exclusive Amount:

Item

Description:

Pack Size Numeric:

Commodity Classification

Additional Item Property

Save To Draft Folder

*Required Fields

Message from webpage

Document Saved in Draft Folder

OK

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.

Document Information

Document flow Document

PEPPOL
PAN-EUROPEAN PUBLIC PROCUREMENT ONLINE

Call For Tender

ContractorParty
Michael Johnsson
(, Endpoint ID)
IDCOM849 (, Party legal entity)
IDPTCOM01 (, VAT)

Contact information
ID:
Tel: 654-564 116-15
Fax: 841-18-188156
Email: test@mail.com

Line	Additional notes:	Quantity	Exclusive Amount	Inclusive Amount
	Description:	Packet quantity:	Pack Size Numeric	Name:
	Additional item properties:			
	ID:	Name:	Test Method:	Value:

Figure 10: Displaying the document in a HTML form

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

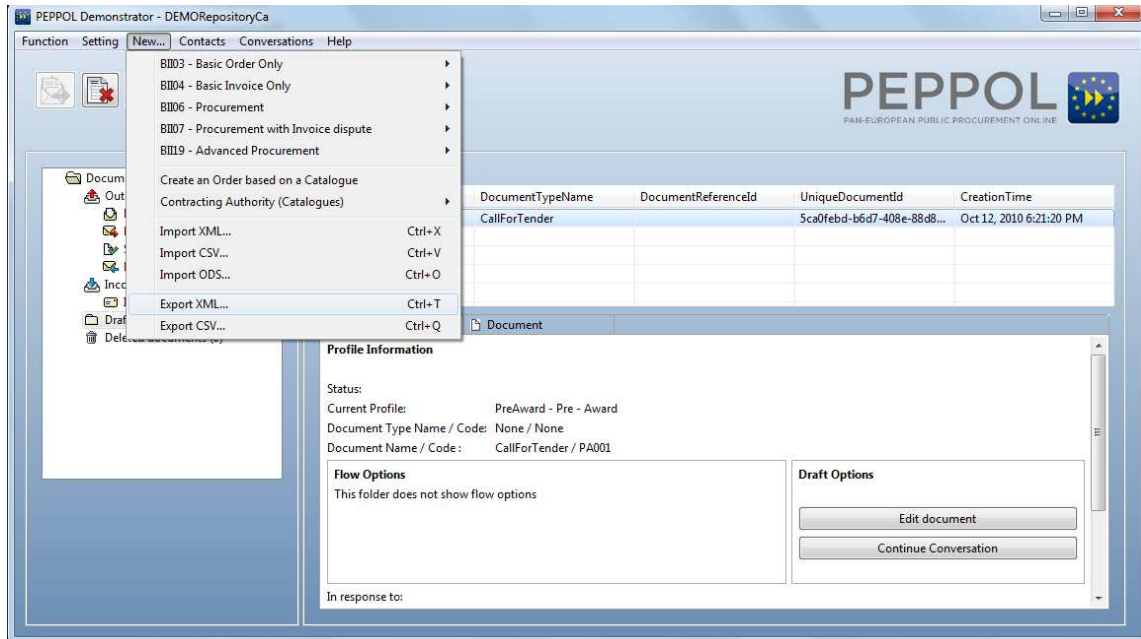


Figure 10: Export option

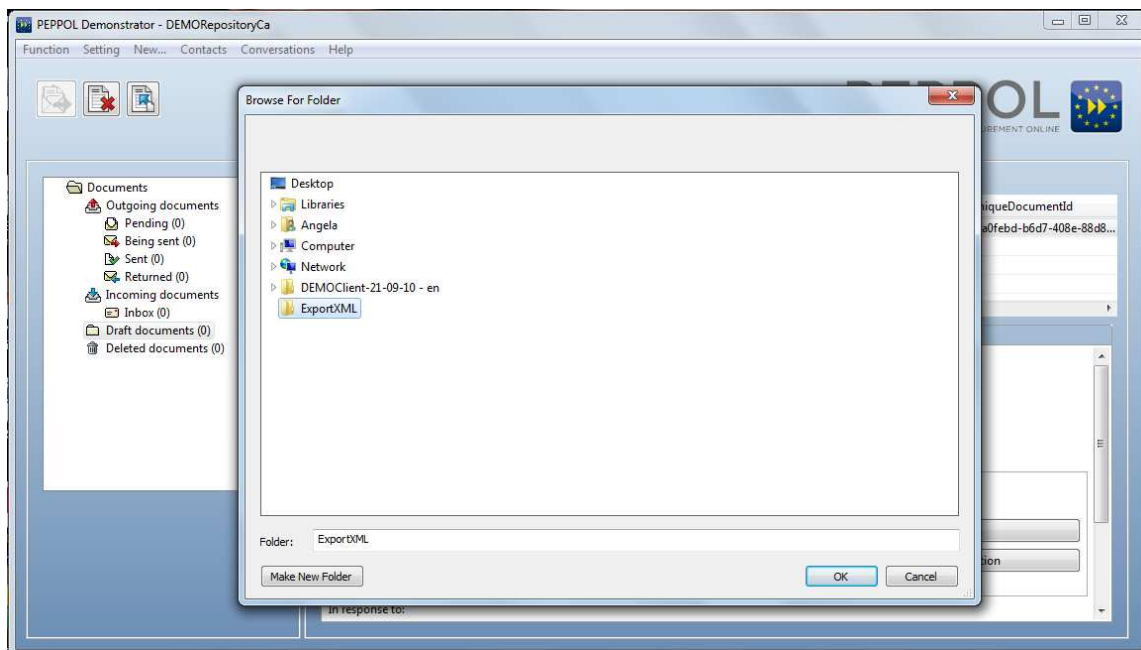


Figure 11: Export browsing

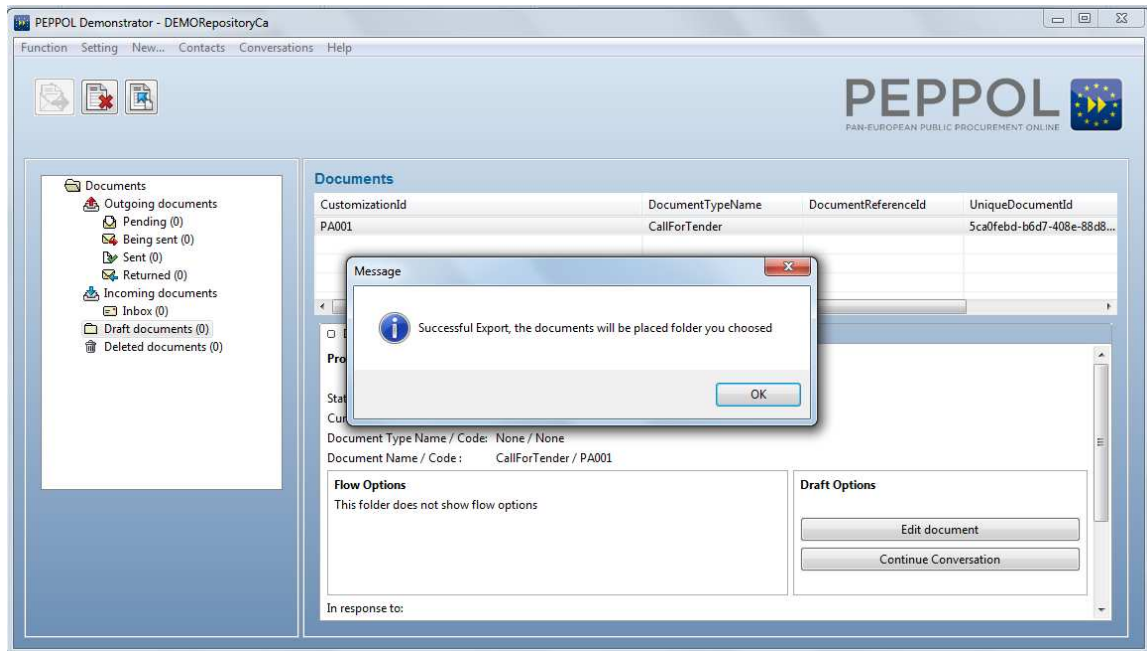


Figure 12: Message of the Export function

Economic Operator (EcOp)

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

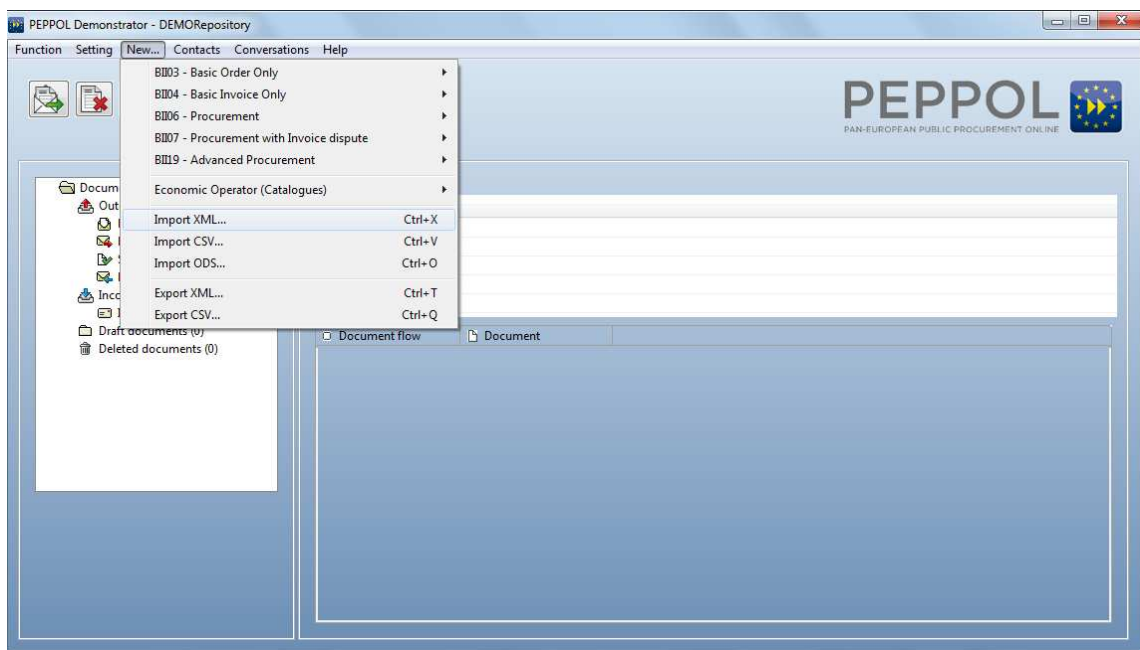


Figure 13: Import option

Selecting browse it can be found the CallForTender document that will be imported.

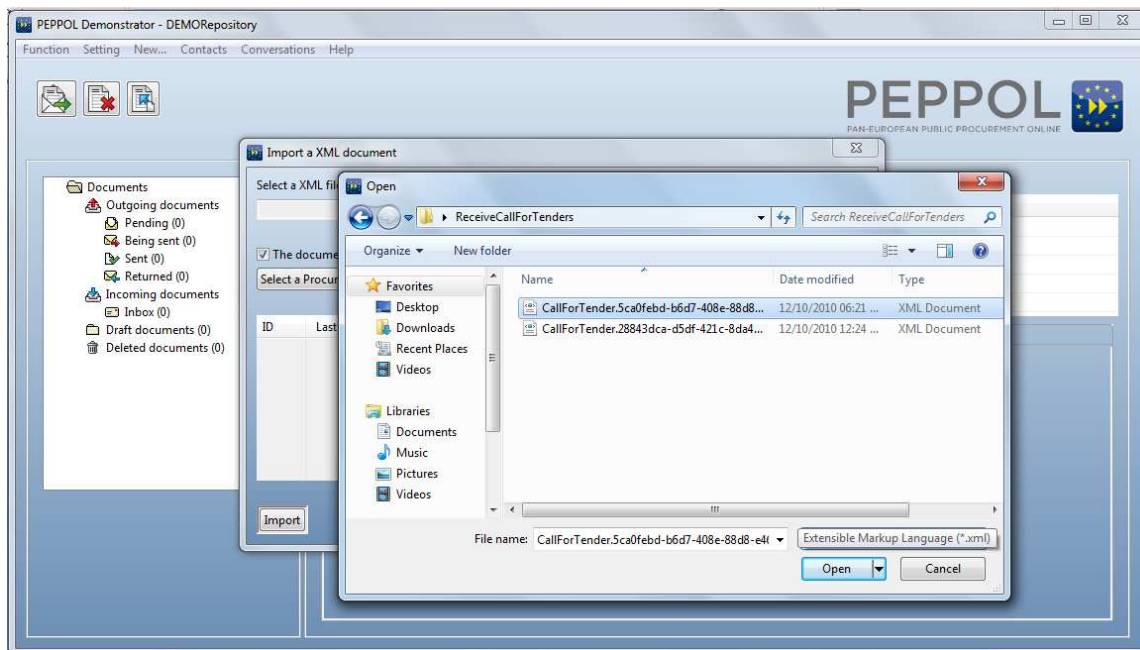


Figure 14: Import browsing

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

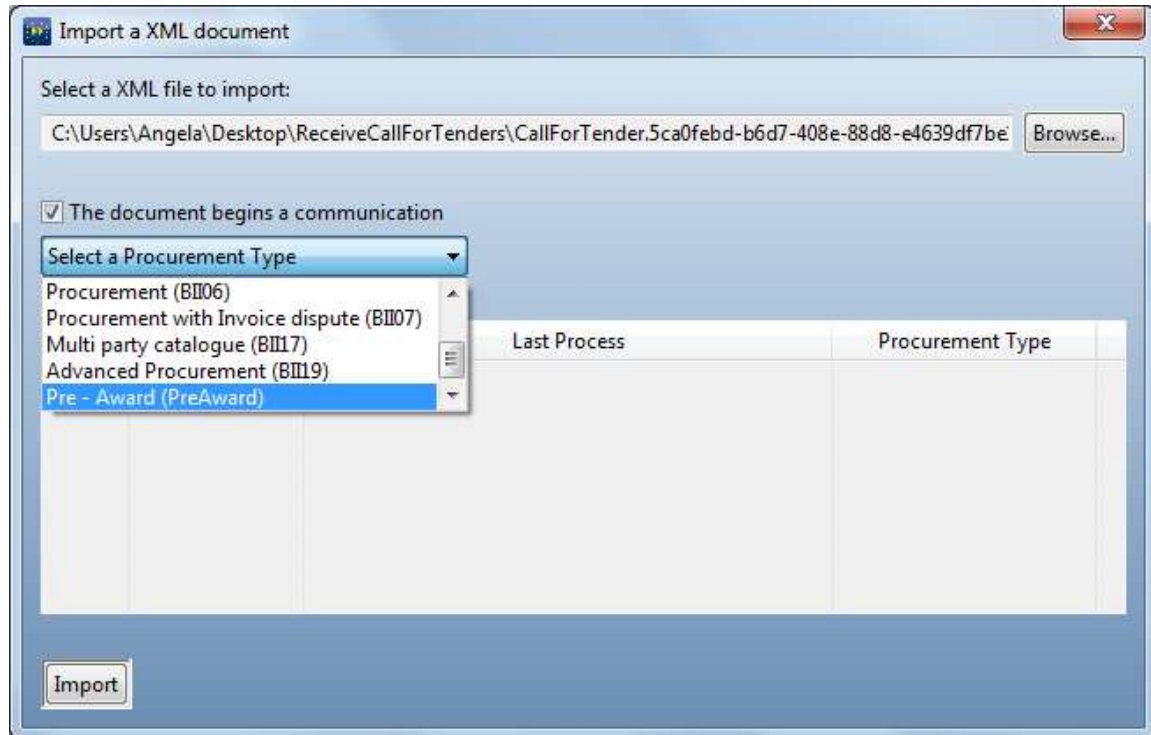


Figure 15: Selecting the correct procurement of the imported document

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

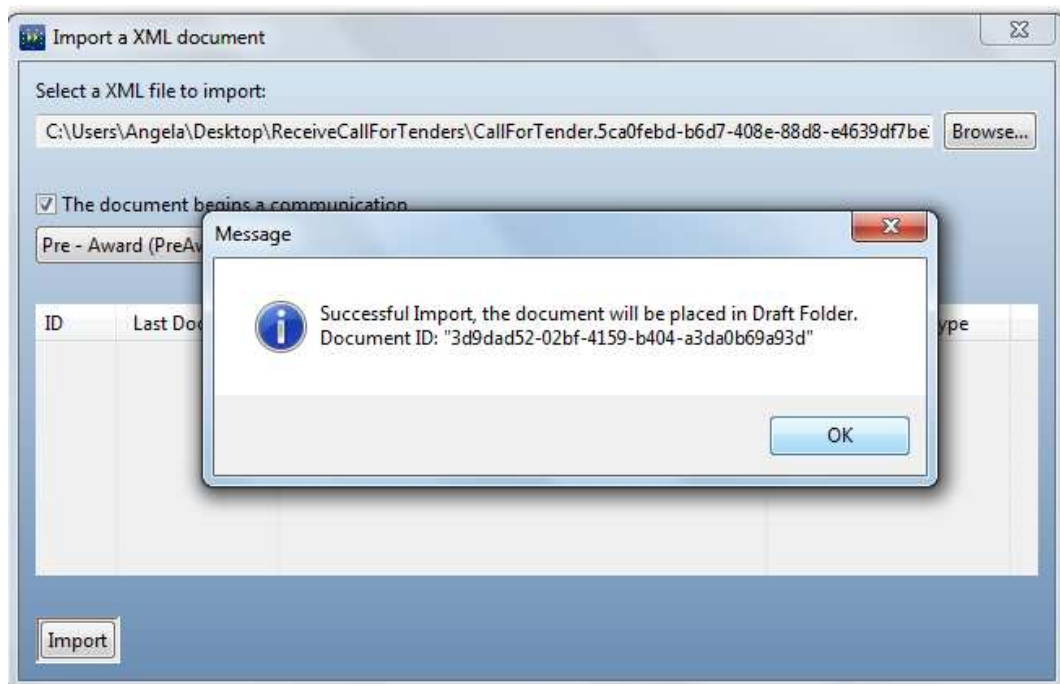


Figure 16: Message of the Importing function

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

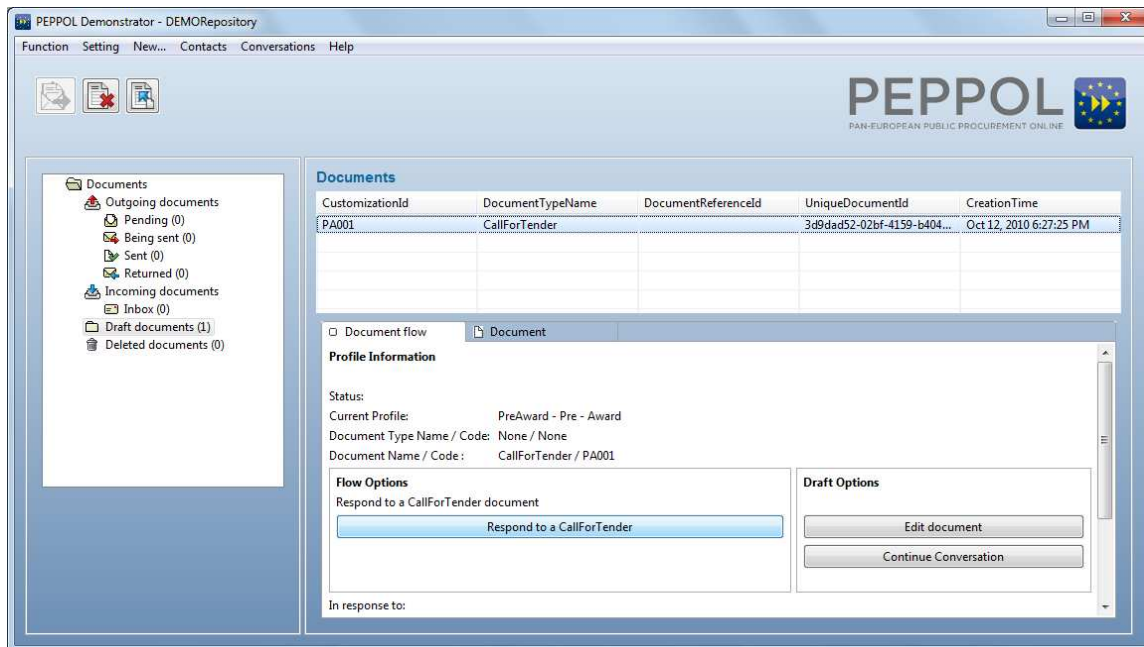



Figure 17: The Client shows the document in the Draft Folder

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.

Tender

New Document

Create Documents

 Draft Folder

Tender


Details | Tendering Party | Contracting Party | Tendered Project

Principal Information

Contract Folder ID:* CFID684 Issue Date:*

Period

Start Date: End Date:



*Required Fields

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.

The screenshot shows the 'Tender' application window with the 'Tendering Party' tab selected. The form is titled 'New Document' and includes a 'Create Documents' section with a 'Draft Folder' button. The main form area is divided into sections for 'Party', 'Party Identification', and 'Postal Address'. The 'Party' section has a radio button for 'Read Contacts List' (selected) and a 'New Contact' option. The 'Party' section includes an 'Endpoint Id' field with the value 'sender business identifier'. The 'Party Identification' section includes an 'Id' field with a red asterisk. The 'Party Name' section includes a 'Name' field with a dropdown menu showing 'Claudia Schmidt', 'Select a Name', and 'Michael Johnsson'. The 'Postal Address' section includes an 'Id' field, a 'Post Box' field, a 'Street Name' field, and an 'Additional Street Name' field.

Figure 19: Tendering Party tab form

The screenshot shows the 'Tender' application window with the 'Contracting Party' tab selected. The form is titled 'New Document' and includes a 'Create Documents' section with a 'Draft Folder' button. The main form area is divided into sections for 'Party', 'Party Identification', and 'Postal Address'. The 'Party' section has a radio button for 'Read Contacts List' (selected) and a 'New Contact' option. The 'Party' section includes an 'Endpoint Id' field with the value 'sender business identifier'. The 'Party Identification' section includes an 'Id' field with a red asterisk and the value 'PartyIdentification ID'. The 'Party Name' section includes a 'Name' field with a dropdown menu showing 'Michael Johnsson', 'Select a Name', and 'Michael Johnsson'. The 'Postal Address' section includes an 'Id' field, a 'Post Box' field, a 'Street Name' field, and an 'Additional Street Name' field.

Figure 20: Contracting Party tab form

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

The screenshot shows the 'Tender' application window with the 'Tendered Project' tab selected. The 'Id' field is 'ID6788' and the 'Description' is 'Description of Procurement'. Below this is a table titled 'Tender Lines' with columns 'Edit', 'Delete', 'Id', and 'Item Name'. The table contains one row with 'Id' 1 and 'Item Name' 'name'. There are buttons for 'new Tender Line' and 'hide form'. A 'Save To Draft Folder' button is at the bottom. A legend indicates that an asterisk (*) denotes required fields.

Edit	Delete	Id	Item Name
<input type="checkbox"/>	<input type="checkbox"/>	1	name

Figure 21: Tendered Project tab with Tender lines

The screenshot shows the 'Tender' application window with the 'Tendered Project' tab selected. The 'Id' field is 'ID6788' and the 'Description' is 'Description of Procurement'. Below this is a table titled 'Tender Lines' with columns 'Edit', 'Delete', 'Id', and 'Item Name'. The table contains one row with 'Id' 1 and 'Item Name' 'name'. There are buttons for 'new Tender Line' and 'hide form'. Below the table, the 'Line ID : 1' is displayed. The 'Line' section has fields for 'Id' (1), 'Reference Id', 'Note', 'Orderable Unit', 'Content Unit' (10), and 'Quantity'.

Edit	Delete	Id	Item Name
<input type="checkbox"/>	<input type="checkbox"/>	1	name

Line ID : 1

Line

Id *	1	Reference Id:	
Note:		Orderable Unit:	
Content Unit *	10	Quantity:	

Figure 22: Editing a Tender Line

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

The screenshot shows the 'Tender' application window. On the left, a 'Create Documents' sidebar lists a 'Draft Folder' and a specific tender document. The main area is titled 'New Document' and contains a table with columns 'Edit', 'Delete', 'Id', and 'Item Name'. Below the table are buttons for 'new Tender Line' and 'hide form'. The 'New Line' section includes various input fields for line details, such as 'Id', 'Reference Id', 'Note', 'Orderable Unit', 'Content Unit', 'Quantity', 'Minimum Order Quantity', 'Maximum Order Quantity', and 'Warranty Information'. There are also dropdown menus for 'Offered Item Location Quantity' and 'Item'.

Figure 23: Creating a new Tender Line

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

This screenshot shows the same 'Tender' application window, but with a 'Message from webpage' dialog box overlaid. The dialog box contains a yellow warning icon and the text 'Document Saved in Draft Folder', with an 'OK' button. In the background, the 'new Tender Line' button is highlighted, and the 'Line ID : 1' is displayed. The 'Save To Draft Folder' button is visible at the bottom of the form.

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

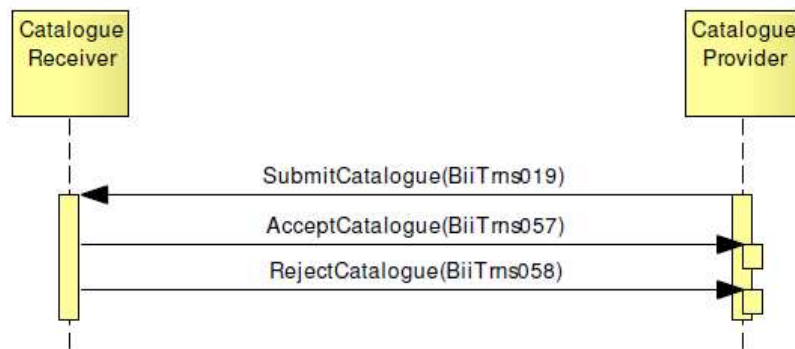


Figure 25: Graphic provided from CenBii (Bii01 Catalogue Only)

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

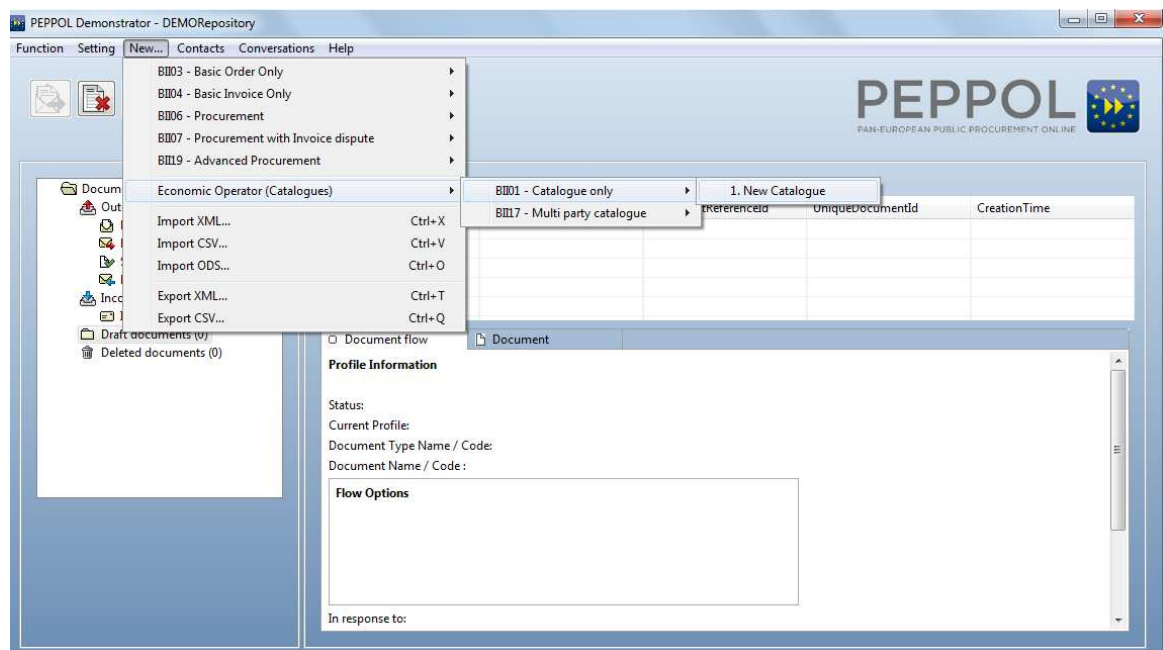


Figure 26: Selecting the New Catalogue option

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

Note that mandatory fields are marked with *.

The screenshot shows the 'Catalogue' application window with the 'New Document' title bar. On the left is a 'Create Documents' sidebar with a 'Draft Folder' button. The main area is titled 'Catalogue' and has four tabs: 'Details', 'Provider Party', 'Receiver Party', and 'Catalogue Line'. The 'Details' tab is active, showing 'Catalogue Details'. Fields include: 'Name' (Furniture Catalogue), 'Version Id' (SC001), 'Issue Date*' (calendar icon), 'Validity Period' with 'Start Date' and 'End Date' (calendar icons), 'Referenced Contract' with 'Id*' (calendar icon) and 'Contract Type' (ReferencedContractContra), and 'Seller Supplier' (dropdown arrow).

Figure 27: Detail tab form

This screenshot shows the same 'Catalogue' application window, but the 'Seller Supplier' dropdown is expanded. It shows two radio buttons: 'Read Contacts List' (selected) and 'New Contact'. Below them is a 'Party Identification' section with 'Id*' (PartyIdentification SSP ID) and a 'Name*' dropdown menu. The dropdown menu is open, showing 'Select a Name', 'Michael Johnsson' (highlighted), and 'Claudia Schmidt'. To the right of the dropdown are fields for 'Endpoint Id' (sender business identifier) and 'Party Name'.

Figure 28: In Detail tab, selecting the Seller Supplier

Catalogue

New Document

Create Documents

Draft Folder

Party Tax Scheme
Party Legal Entity
Contact
Person

Contractor Customer Party

☒ Read Contacts List ☐ New Contact

Endpoint Id: sender business identifier

Party Identification

Id.*: Party CCP ID

Party Name

Name.*: Claudia Schmidt

Postal Address
Party Tax Scheme
Party Legal Entity
Contact
Person

Save To Draft Folder Prepare to Send Validate

*Required Fields

Figure 29: In Detail tab, selecting the Contractor Customer

Catalogue

New Document

Create Documents

Draft Folder

Details Provider Party Receiver Party Catalogue Line

Provider Party

☒ Read Contacts List ☐ New Contact

Party

Endpoint Id: sender business identifier

Party Identification

Id.*: PartyIdentification Sender

Party Name

Name.*: Michael Johnsson

Postal Address

Street Name: City Name: Postal Zone: Country Code.*:

Figure 30: Provider Party tab form

Catalogue

New Document

Create Documents

[Draft Folder](#)

Catalogue

Details | **Provider Party** | **Receiver Party** | Catalogue Line

Receiver Party

☒ Read Contacts List ☐ New Contact

Party

Endpoint Id:

Party Identification

Id:

Party Name

Name:
 Select a Name
 Michael Johnsson

Postal Address:

Street Name: City Name:

Postal Zone: Country Code:

Figure 31: Receiver tab form

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

Catalogue

New Document

Create Documents

[Draft Folder](#)

Catalogue

Details | Provider Party | Receiver Party | **Catalogue Line**

Catalogue Lines

Edit	Delete	Id	Item	Price Amount
New Line	Hide Line			

[Save To Draft Folder](#) [Prepare to Send](#) [Validate](#)

*Required Fields

Figure 32: Empty Catalogue Line tab

Catalogue

New Document

Create Documents

Draft Folder

Catalogue

Details Provider Party Receiver Party Catalogue Line

Catalogue Lines

Edit	Delete	Id	Item	Price Amount
<input type="button" value="New Line"/> <input type="button" value="Hide Line"/>				

New Line

Id:*

Action Code:*

Orderable Indicator:*

Orderable Unit:

Content Unit Quantity:*

Order Quantity Increment Numeric:

Minimum Order Quantity:

Maximum Order Quantity:

Warranty Information:

Line Validity Period

Start Date:

End Date:

Figure 33: Catalogue Line form

Catalogue

New Document

Create Documents

Draft Folder

Price, Lead Time and Delivery Address

Price

Price Amount:*

Base Quantity:

Validity Period

Start Date:

End Date:

Lead Time

Lead Time Measure:

Maximum Quantity:

Unit Code:

Minimum Quantity:

Applicable Delivery Territory/Address

Id:

Address Type Code:

Street Name:

Additional Street Name:

Building Number:

Country Identification:

Currency Id:*

City Name:

Postal Zone:

Country Subentity:

Region:

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

Catalogue
New Document

Create Documents

[Draft Folder](#)

Id:

Address Type Code:

Street Name:

Additional Street Name:

Building Number:

Country Identification Code:

City Name:

Postal Zone:

Country Subentity:

Region:

[add](#) [delete](#)

Price, Lead Time and Delivery Address

Edit	Id	Price Amount	Currency Id	Country Identification	Lead Time Measure
<input type="checkbox"/>	1	10.0	AFN		

Item

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

Catalogue
New Document

Create Documents

[Draft Folder](#)

Item

Description:

Pack Size Numeric:

Hazardous Risk Indicator:

Brand Name:

Pack Quantity:

Name:

Keyword:

Model Name:

[add](#) [delete](#)

Item Keyword

Edit	Keyword
<input type="checkbox"/>	1

Buyers Item Identification

Sellers Item Identification

Manufacturers Item Identification

Standard Item Identification

Item Specification Document Reference

Origin Country

Commodity Classification*

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

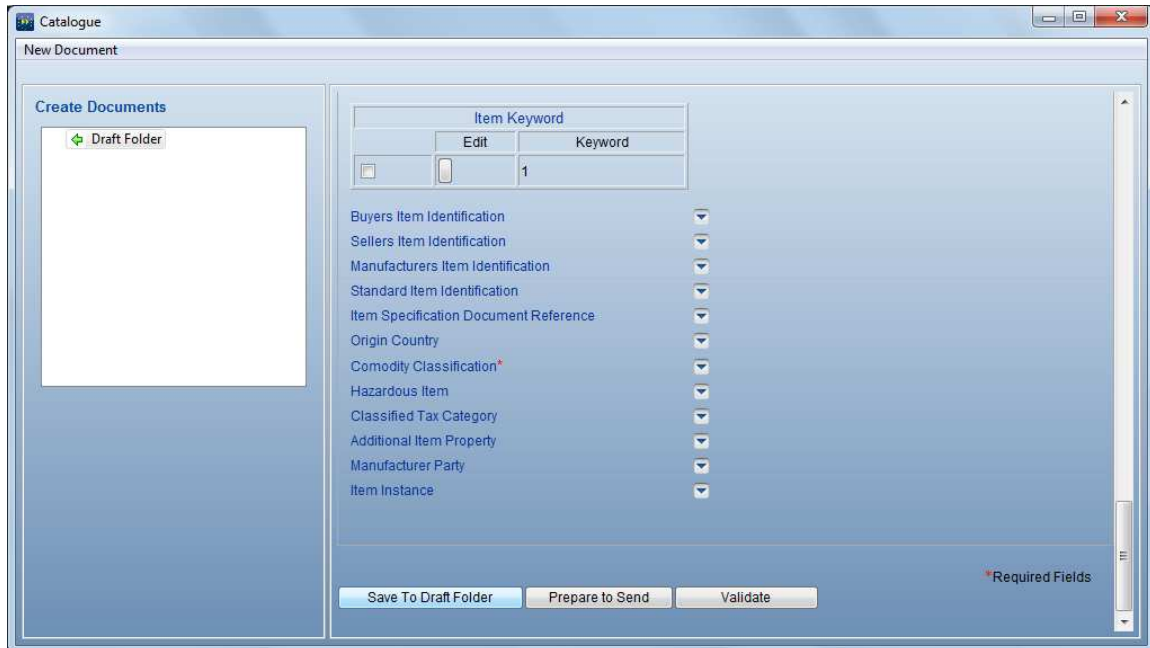


Figure 37: Details groups

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.

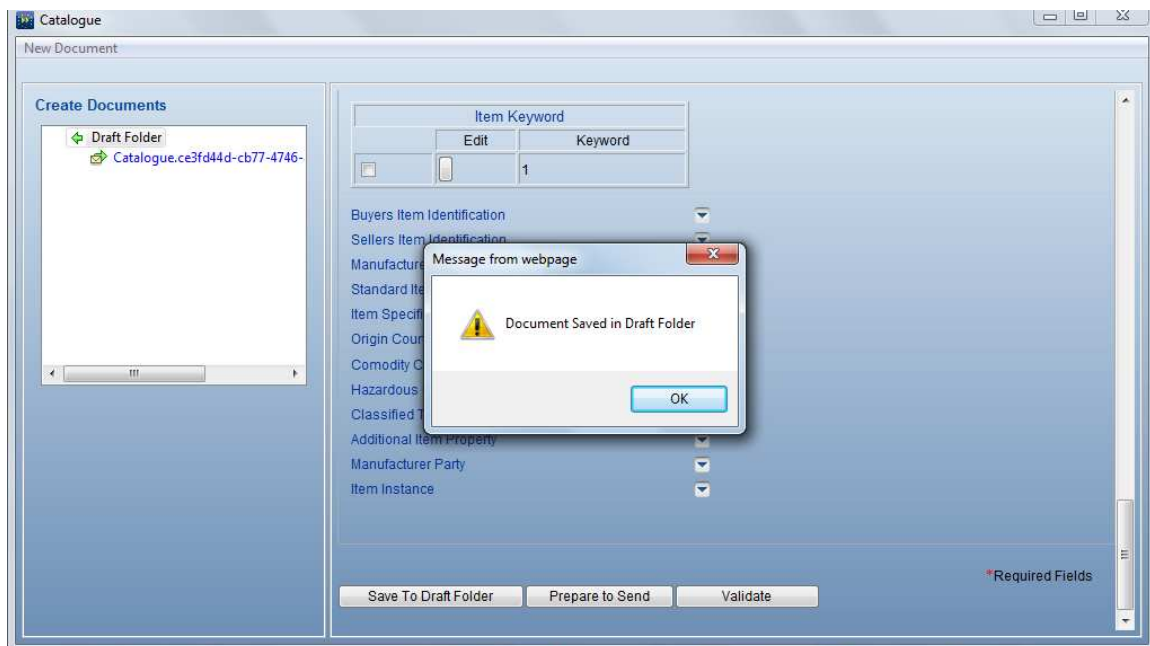


Figure 38: Saving the Catalogue in Draft Folder

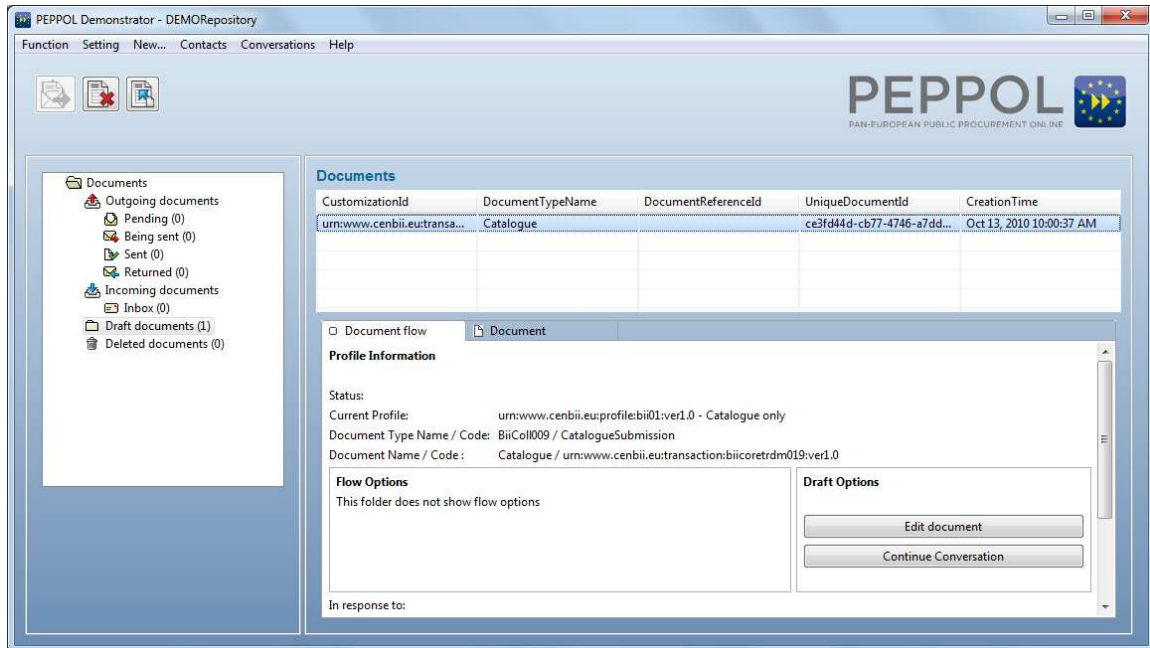


Figure 39: The Client shows the document in the Draft Folder

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.

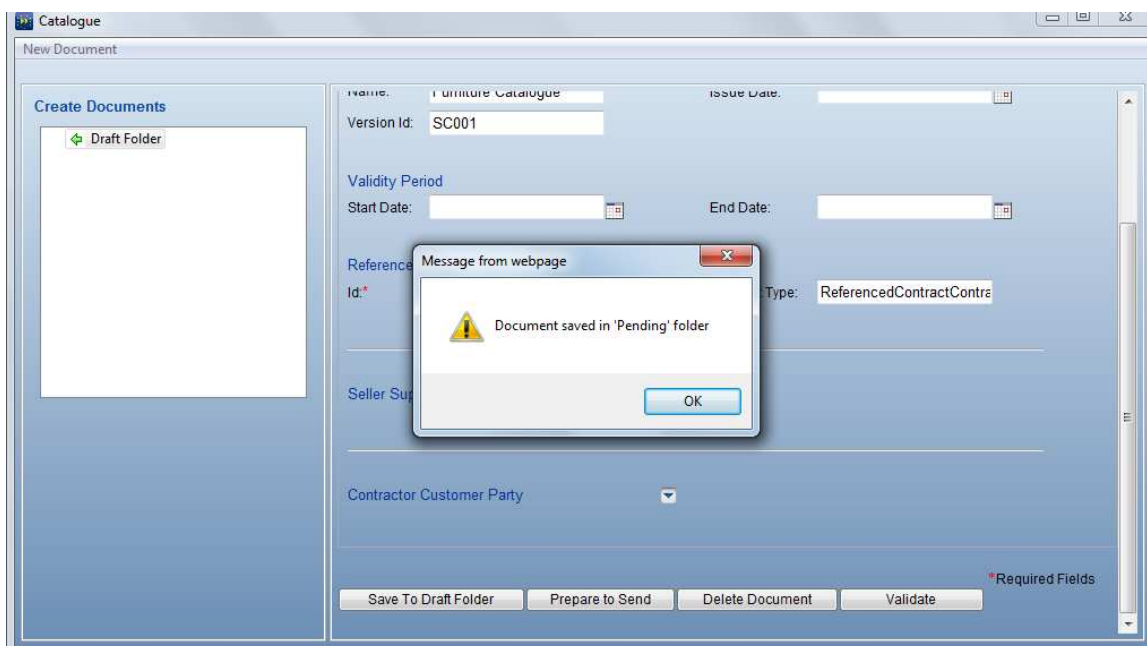


Figure 40: Saving the Catalogue in the Pending Folder

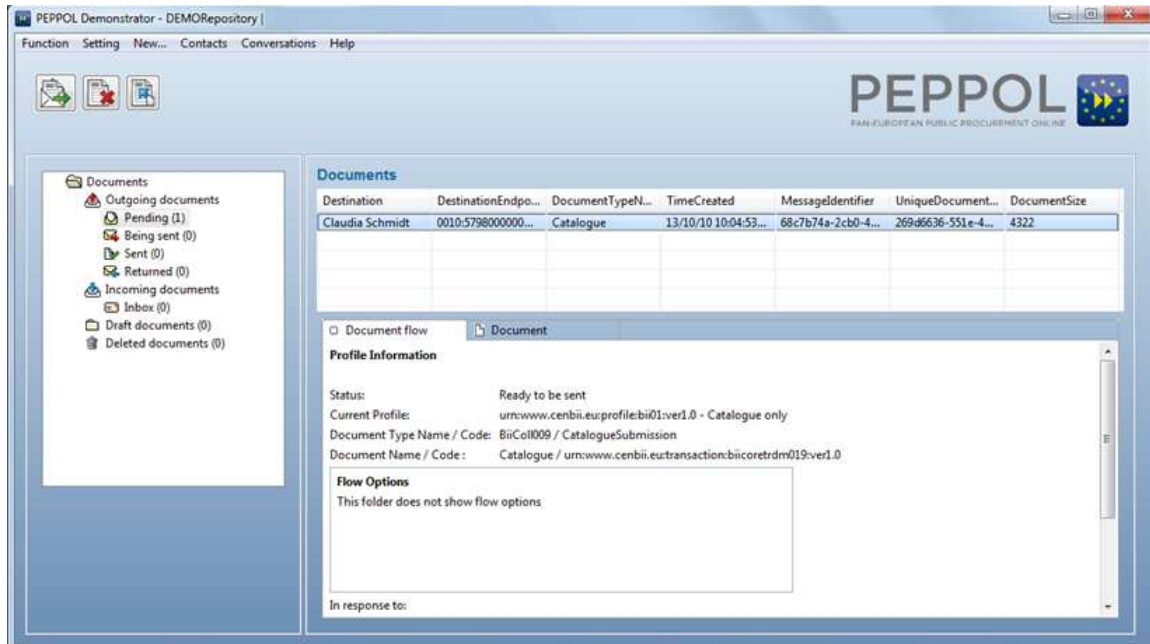


Figure 41: The Client shows the document in the Pending Folder

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.

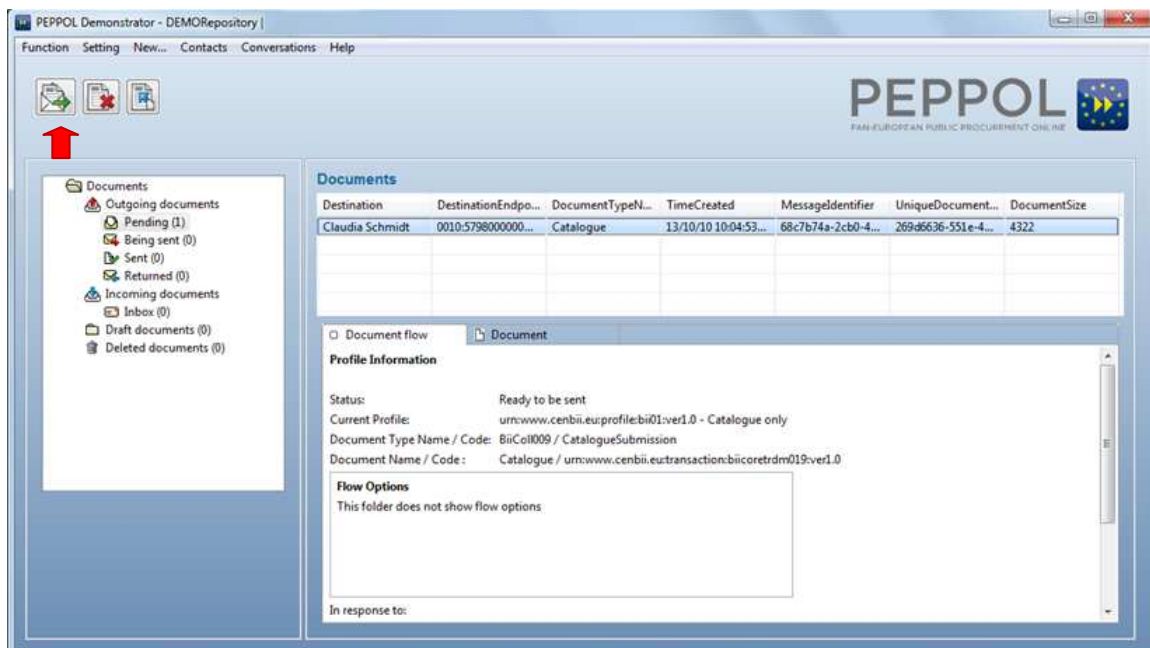


Figure 42: Pressing the Send button

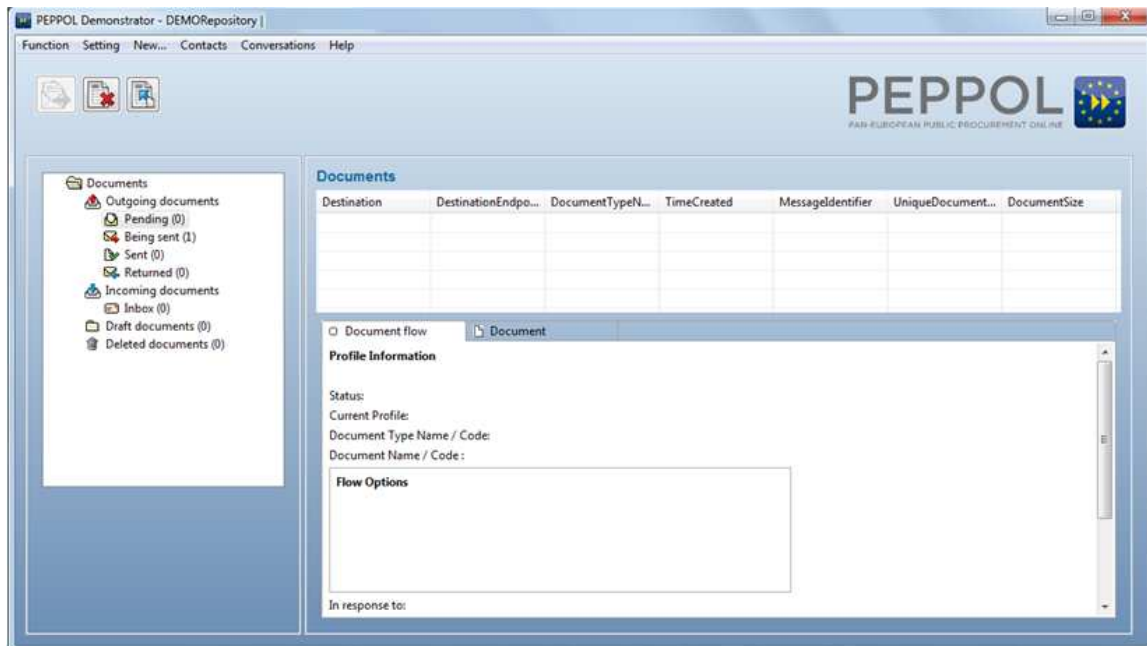


Figure 43: Document in Being Sent Folder

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** either an **AcceptCatalogue** or a **RejectCatalogue** from the **Ca** party.

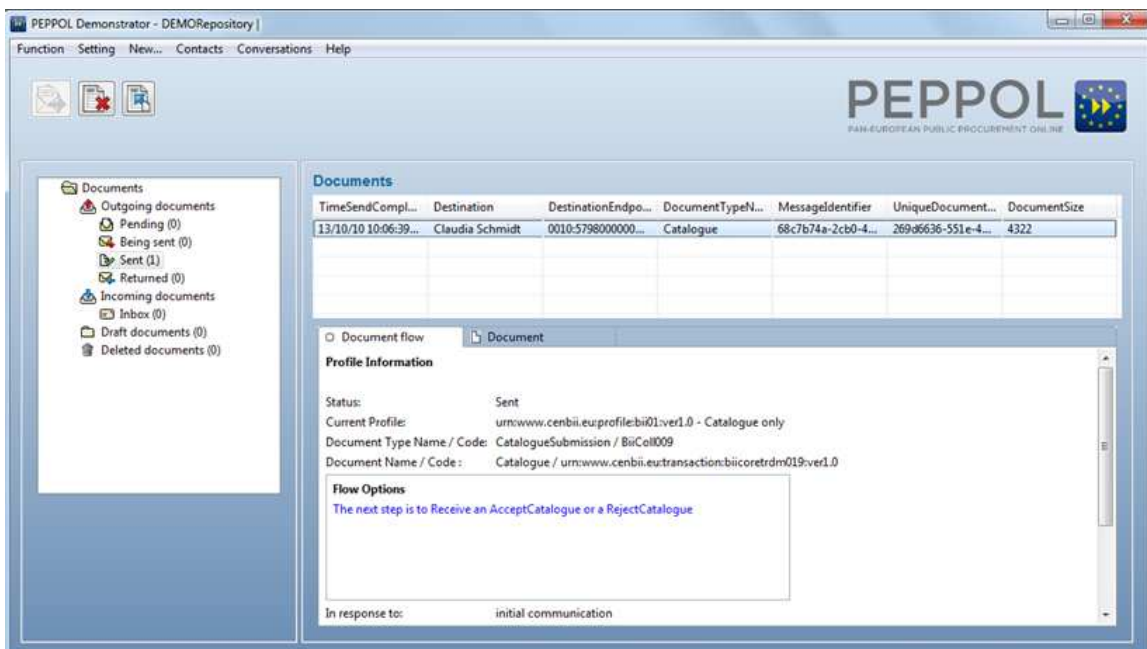


Figure 44: Document in Sent Folder

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).

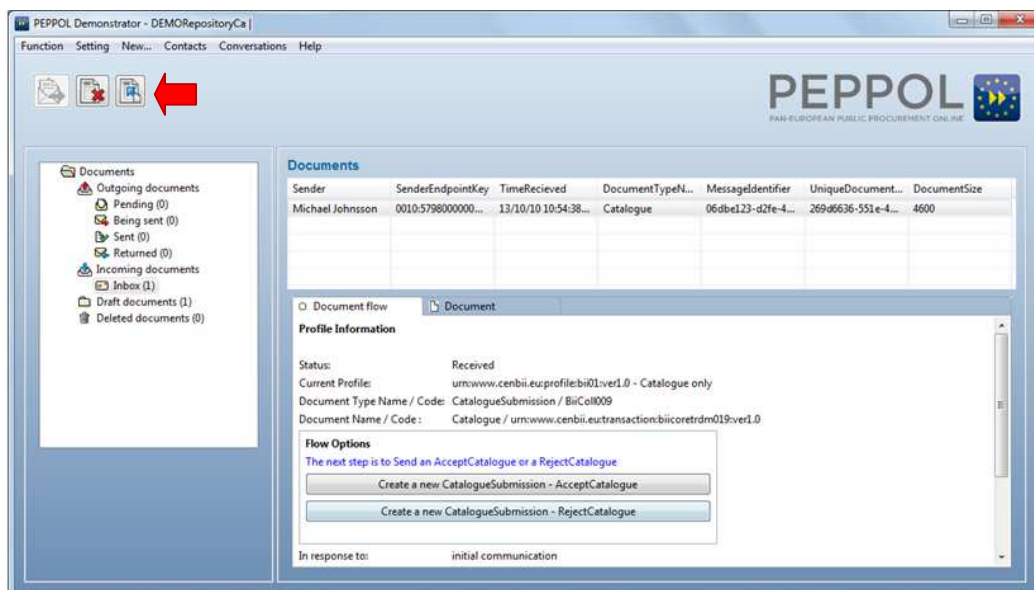


Figure 45: Pressing the Show button to display the document in a different window

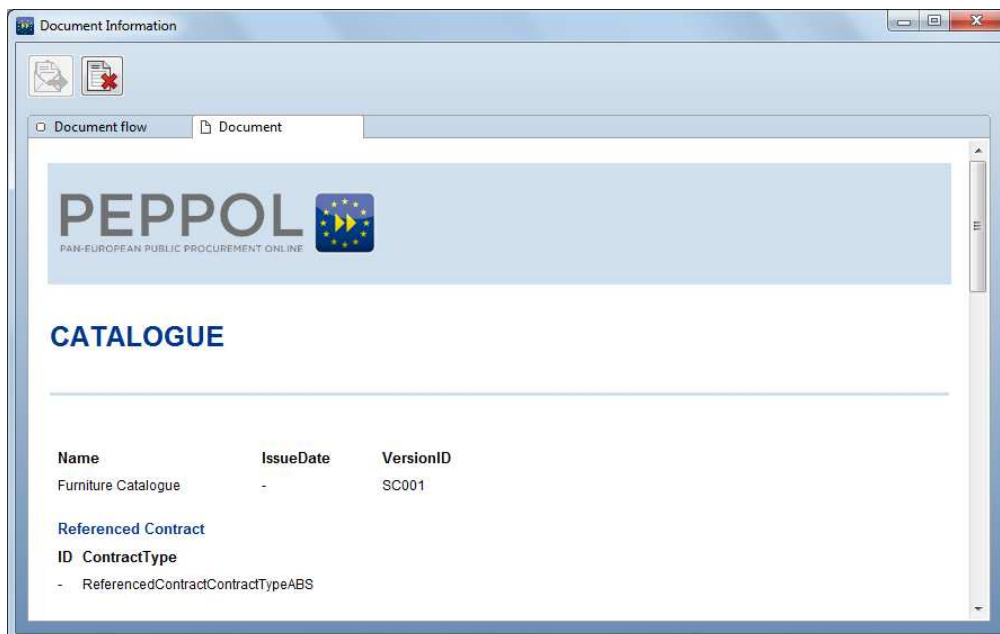


Figure 46: Displaying the document in HTML form

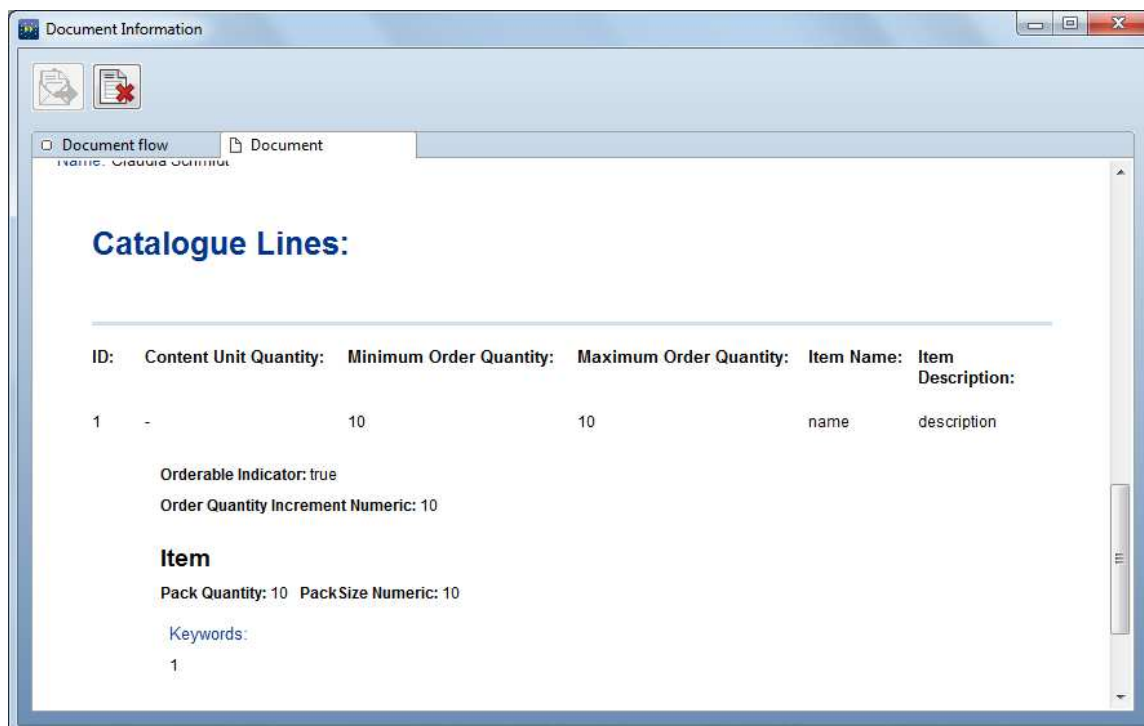


Figure 47: Displaying the document in HTML form

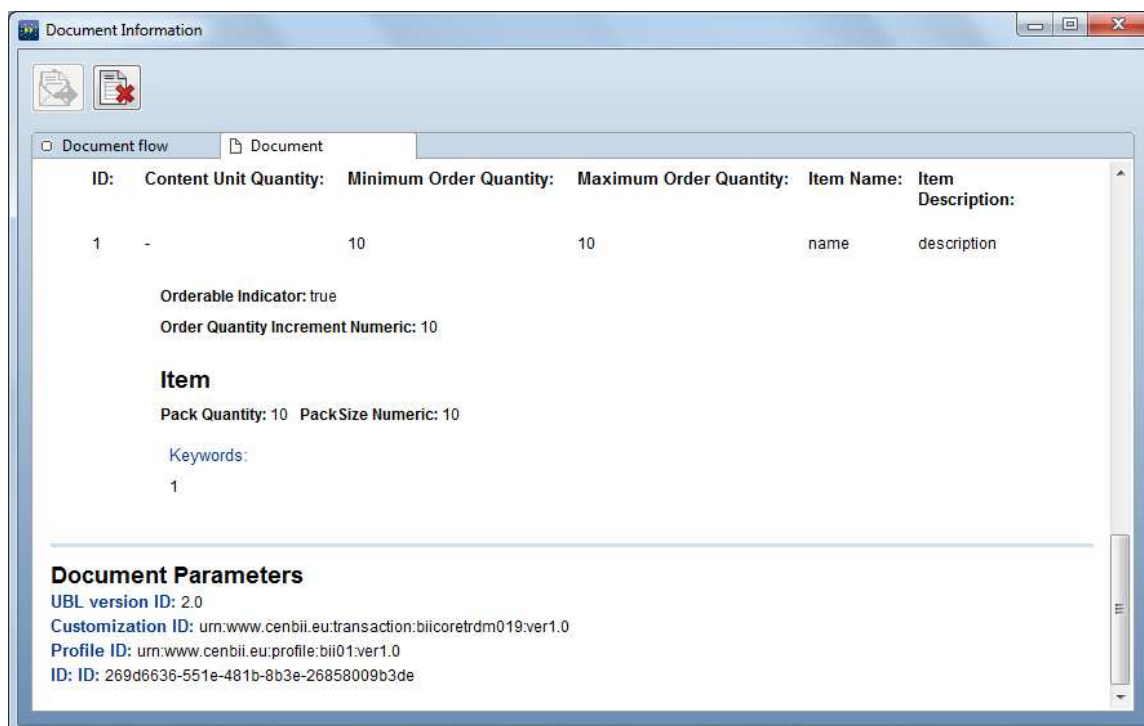


Figure 48: Displaying the document in HTML form

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

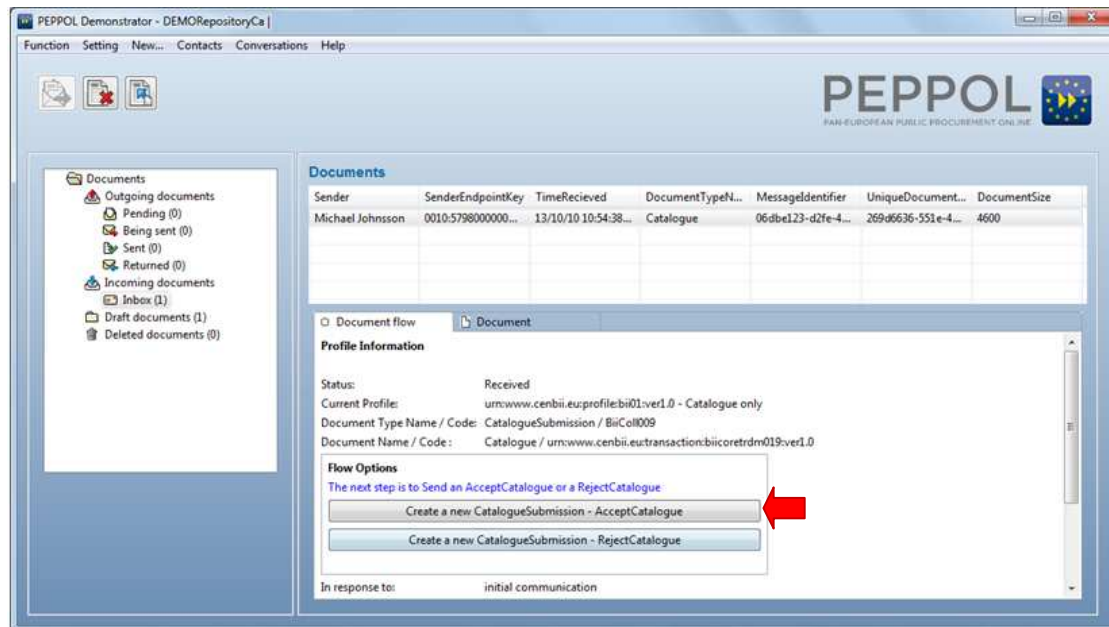


Figure 49: Creating an AcceptCatalogue to continue with the flow

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

The screenshot shows the 'Accepted Catalogue' form. It has a 'Details' tab and a 'Catalogue Details' section. The 'Sender Party' section has a dropdown for 'Read Contacts List' and a 'New Contact' button. The 'Receiver Party' section also has a dropdown for 'Read Contacts List' and a 'New Contact' button. The form includes fields for 'Issue Date', 'Issue Time', 'Note', 'Party Identification', 'Name', and 'Endpoint Id'.

Figure 50: Selecting the Sender Party

Accepted Catalogue

New Document

Create Documents

Draft Folder

Party Identification:

Id: 68KJ646

Party Name:

Name: Claudia Schmidt

Receiver Party:

Read Contacts List: New Contact:

Endpoint Id:

Party Identification

Party Name

Id: 1567DFS8670

Name: Select a Name
Select a Name
Michael Johnsson
Claudia Schmidt

Document Response

Reference Id: Line 12

Reference Code: AP

Description: The description

Id: 269d6636-551e-481b-8b3e

Document Type Code: 380

Save To Draft Folder Prepare to Send Validate

* Required Fields

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).

Accepted Catalogue

New Document

Create Documents

Draft Folder

AcceptCatalogue.17dd4e8f-e28e

Party Identification:

Id: 68KJ646

Party Name:

Name: Michael Johnsson

Receiver Party:

Read Contacts List: New Contact:

Endpoint Id:

Party Identification

Party Name

Id: 1567DFS8670

Name: Michael Johnsson

Document Response

Reference Id: Line 12

Reference Code: AP

Description: The description

Id: 269d6636-551e-481b-8b3e

Document Type Code: 380

Save To Draft Folder Prepare to Send Validate

* Required Fields

Message from webpage

Document Saved in Draft Folder

OK

Figure 52: Saving the document in the Draft Folder

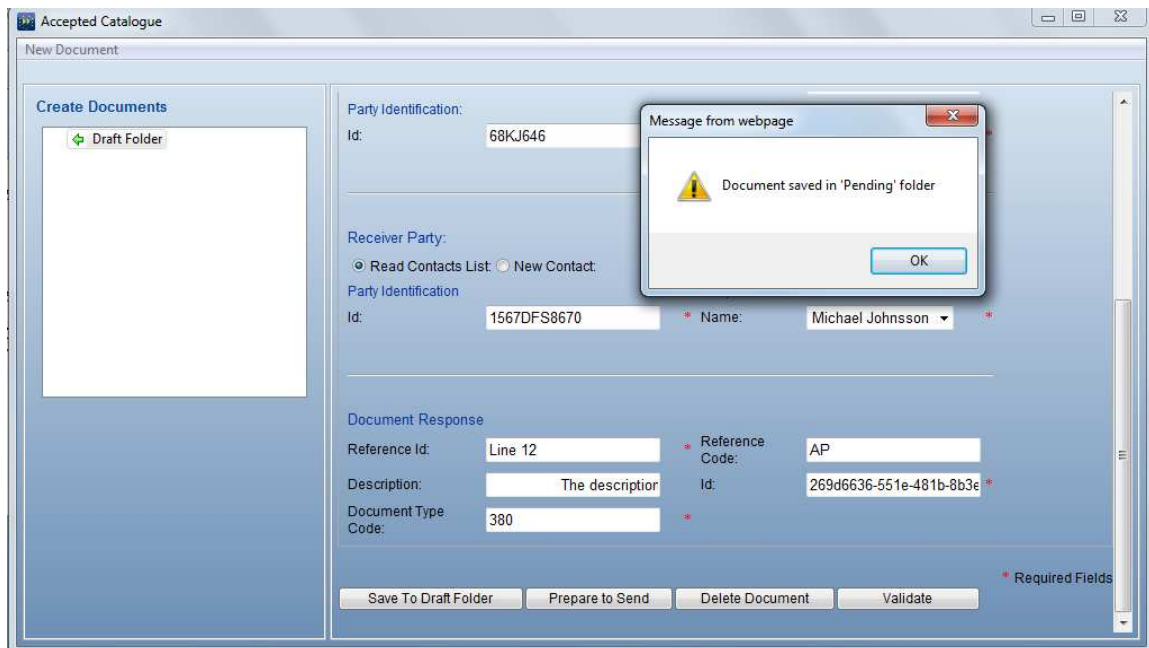


Figure 53: Saving the document in the Pending Folder

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

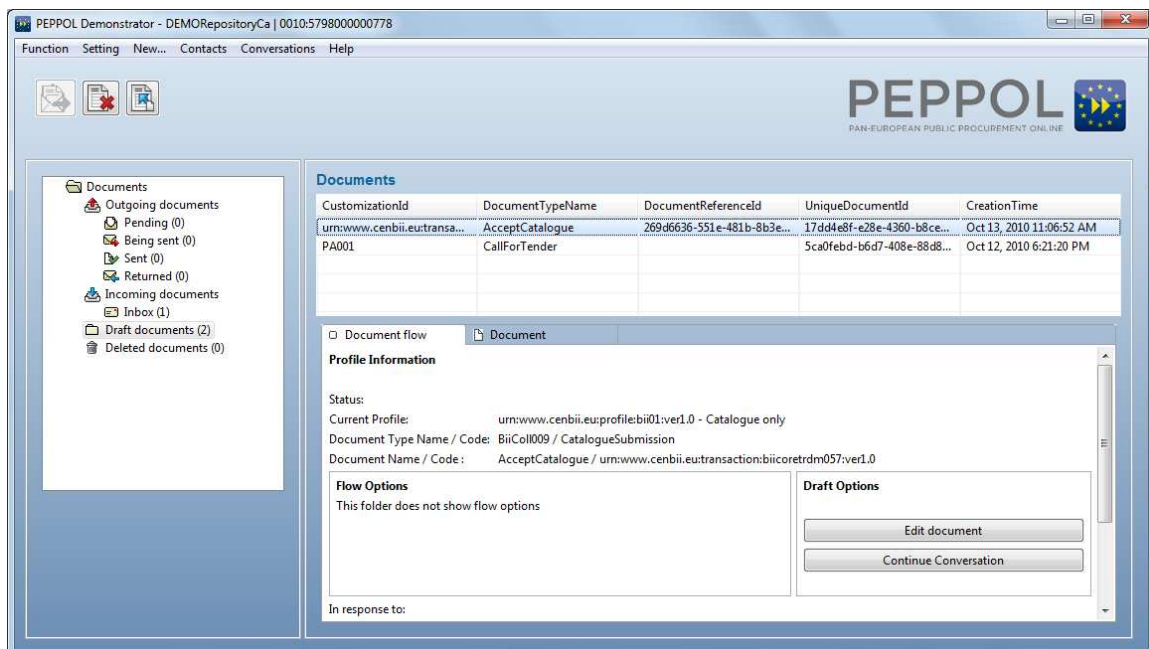


Figure 54: The Client shows the document in the Draft Folder

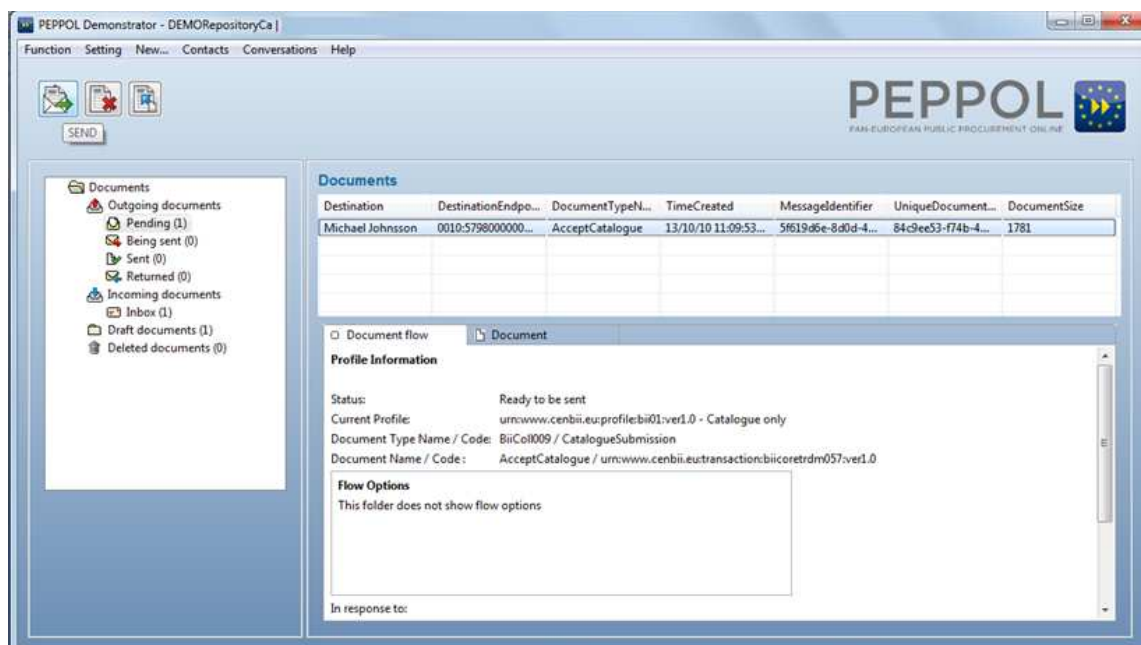


Figure 55: The Client shows the document in the Pending Folder

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.

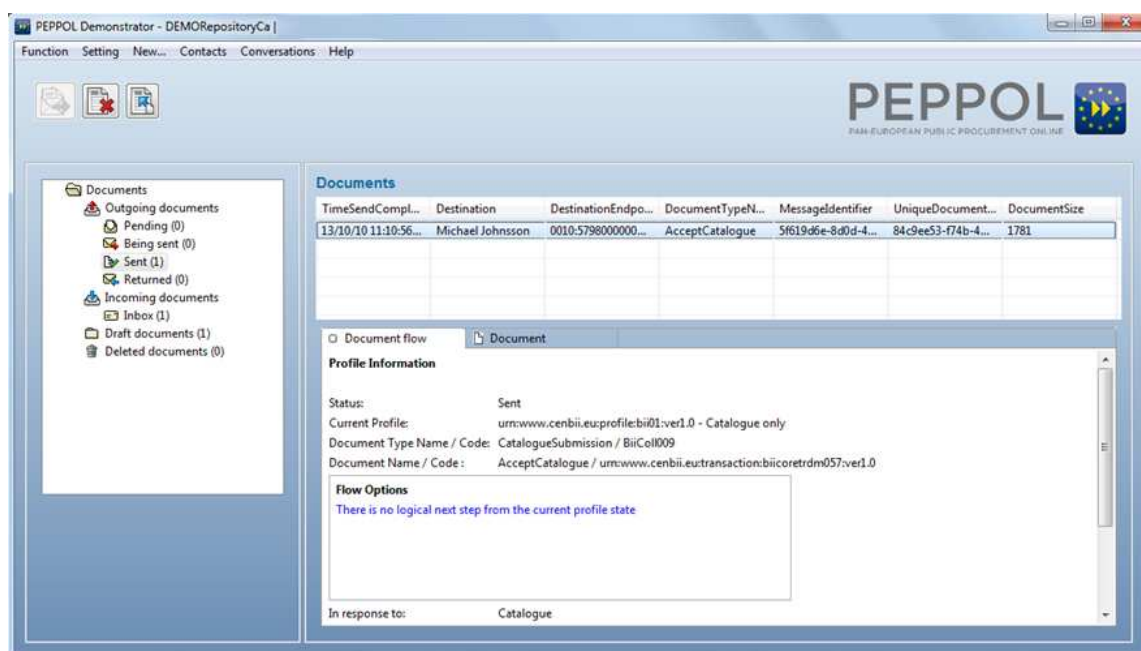


Figure 56: The document was sent and placed in the Sent Folder

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.

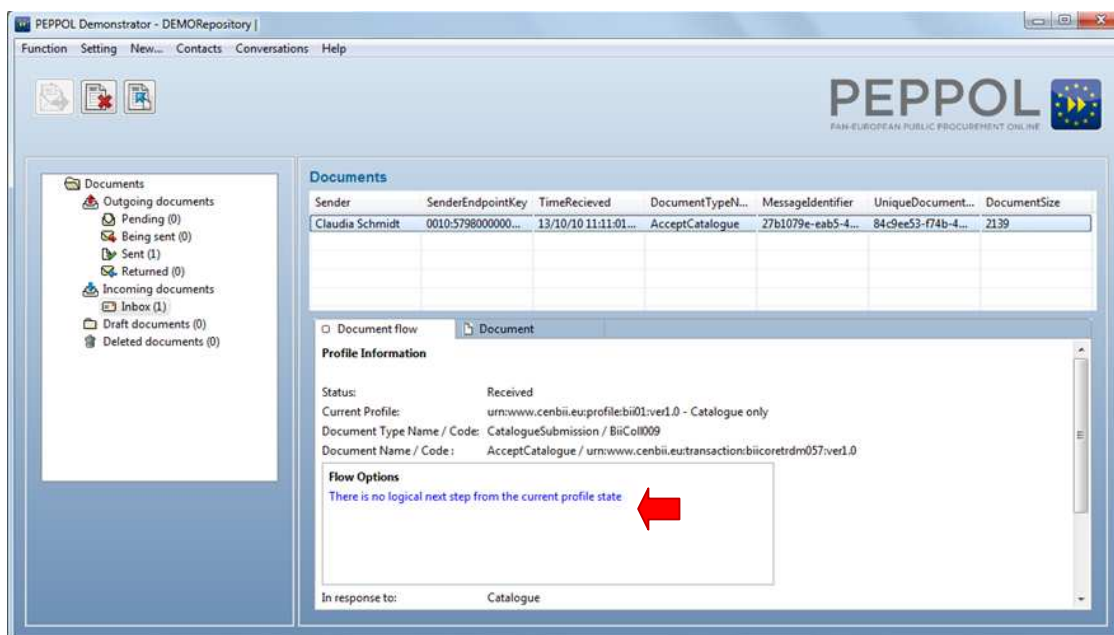


Figure 57: The EcOp received the document in Inbox Folder

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

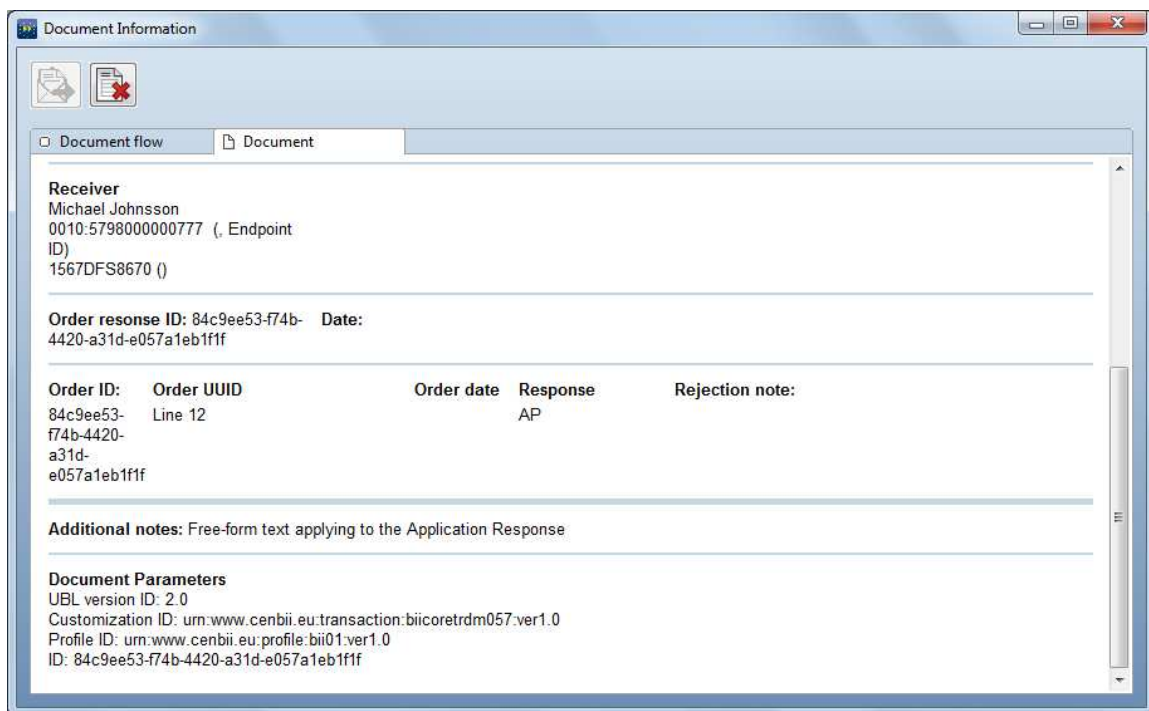


Figure 59: The Client allows to display the document in a HTML form