



# PEPPOL

## DEMONSTRATOR CLIENT



### Pre-Award and Post-Award Phases

*Version 0.9.1*



PEPPOL 2010-11-15

**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	ARM	Initial version
2010-10-12	0.9.0	JFA	Updating descriptions
2010-11-15	0.9.1	ARM	Updates

### 1.2. Editors

Initials	Name	Company
ARM	Angela Roca Márquez	Alfa1lab
JFA	Joan Farfan Armas	Alfa1lab

## 2. Introduction

This document guides the user through easy steps about how to work Pre-Award and Post-Award phases in the PEPPOL Demonstrator Client. It contains simple lessons since how to set up your CallForTender document as Contracting Authority, a Tender document as Economic Operator, importing them to get new options in the Client, etc. till how to get a completely Post-Award Catalogue accepted or rejected.

### 3. Prerequisites

The demonstrator client has an important requisite on the computer (See the document “PEPPOL Demonstrator Tutorial” on Prerequisites section)

The demonstrator client must be installed (See the document “PEPPOL Demonstrator Client User Guide” on How to Install section)

DEMOClient counts with two roles:

- Economic Operator: **EcOp**
- Contracting Authority: **Ca**

(See the document “PEPPOL Demonstrator Client Tutorial” on Lesson: Managing Roles)

You can find the document on:

[https://svn.forge.osor.eu/svn/peppol/Documents/Demo\\_Client/](https://svn.forge.osor.eu/svn/peppol/Documents/Demo_Client/)

#### 4. Pre - Award Phase

##### Contracting Authority (Ca)

**Ca** starts the transaction creating the CallForTender document.

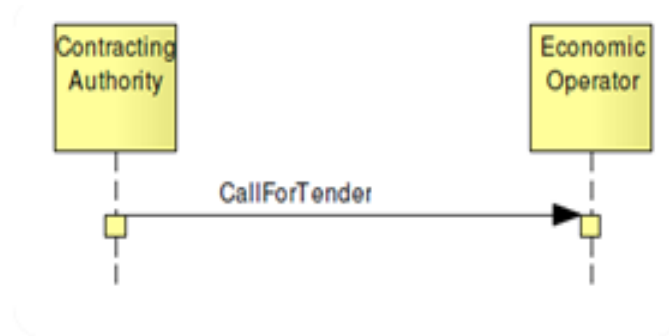


Figure 1: Graphic provided from CenBii

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

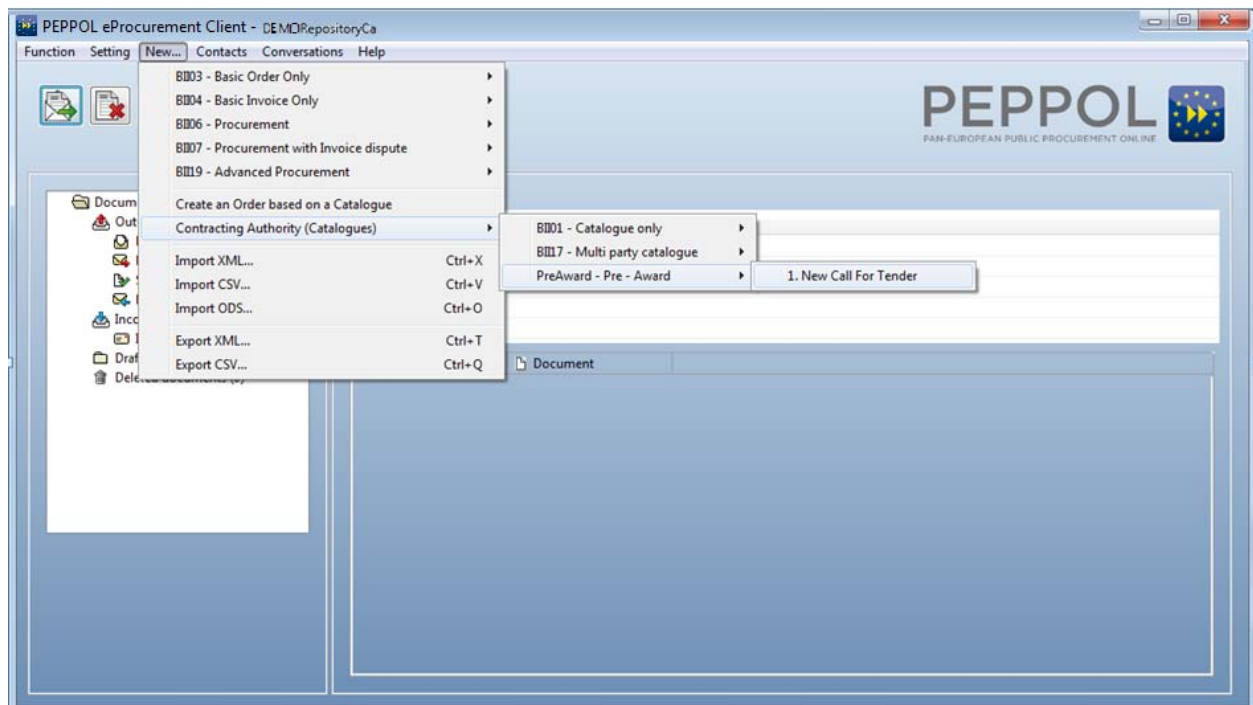


Figure 2: Selecting the New CallForTender option

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

Note that mandatory fields are marked with \*.

The screenshot shows the 'Call For Tender' application window with the 'Details' tab selected. The left sidebar shows a 'Create Documents' section with a 'Draft Folder' and a document named 'CallForTender.49c888b6-1644'. The main form area has three tabs: 'Details', 'Customer Party', and 'Procurement Project\*'. The 'Details' tab contains the following sections:

- Principal Information**: Fields for 'Contract Folder ID:\*' and 'Issue Date:\*' with a calendar icon.
- Tendering terms**: A 'Note:\*' field containing the text 'This is the note for the doc'.
- Tendering Process**: A 'Process Type:\*' dropdown menu with 'Tendering Process type' selected.

At the bottom right, there is a legend for '\*Required Fields'. At the bottom left, there are two buttons: 'Save To Draft Folder' and 'Validate'.

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).

The screenshot shows the 'Call For Tender' application window with the 'Customer Party' tab selected. The left sidebar is the same as in Figure 3. The main form area has three tabs: 'Details', 'Customer Party', and 'Procurement Project'. The 'Customer Party' tab contains the following sections:

- Customer Party**: Radio buttons for 'Read Contacts List' (selected) and 'New Contact'.
- Party**: An 'Endpoint Id:' field with the value 'sender business identifier'.
- Party Identification**: An 'Id:\*' field with the value 'PartyIdentification ID'.
- Party Name**: A 'Name:\*' dropdown menu with 'Michael Johnsson' selected. The dropdown list shows 'Select a Name', 'Michael Johnsson', and 'Claudia Schmidt'.
- Postal Address**: Fields for 'Id:' (value 'TestID'), 'Post Box:' (value 'PB654'), 'Street Name:' (value 'Street Name Test'), and 'Additional Street Name:' (value '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.

Figure 5: Procurement Project tab form

Figure 6: Pressing the New Request for Tender Line button



Note: To use eCI@ss webservice, see the document “PEPPOL Demonstrator Client Tutorial” on Lesson: Paradine WebService: Using eCI@ss.

You can find the document on:

[https://svn.forge.osor.eu/svn/peppol/Documents/Demo\\_Client/](https://svn.forge.osor.eu/svn/peppol/Documents/Demo_Client/)

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

The screenshot shows the 'Call For Tender' application window with a 'New Document' tab. On the left, there is a 'Create Documents' panel with a 'Draft Folder' button. The main area is titled 'New Line' and contains several input fields: 'Tender Line Id.\*', 'Quantity', 'Maximum Tax Inclusive Amount', 'Note', 'Maximum Tax Exclusive Amount', 'Item Description', 'Pack Quantity', 'Pack Size Numeric', and 'Name'. There are also dropdown menus for 'Commodity Classification' and 'Additional Item Property'. At the bottom, there is a 'Save To Draft Folder' button and a '\*Required Fields' label.

Figure 7: Request for Tender Line form

This screenshot shows the same 'Call For Tender' application window, but with a 'Message from webpage' dialog box open in the center. The dialog box has a yellow warning icon and the text 'Document Saved in Draft Folder' with an 'OK' button. In the background, the 'New Line' form is partially visible, showing that the 'Id.\*' field now contains the value '1' and the 'Quantity' field contains '10.0'. The 'Save To Draft Folder' button is still visible at the bottom.

Figure 8: Saving in Draft Folder

Then, the Client will display in the main interface the document saved in the Draft Folder.

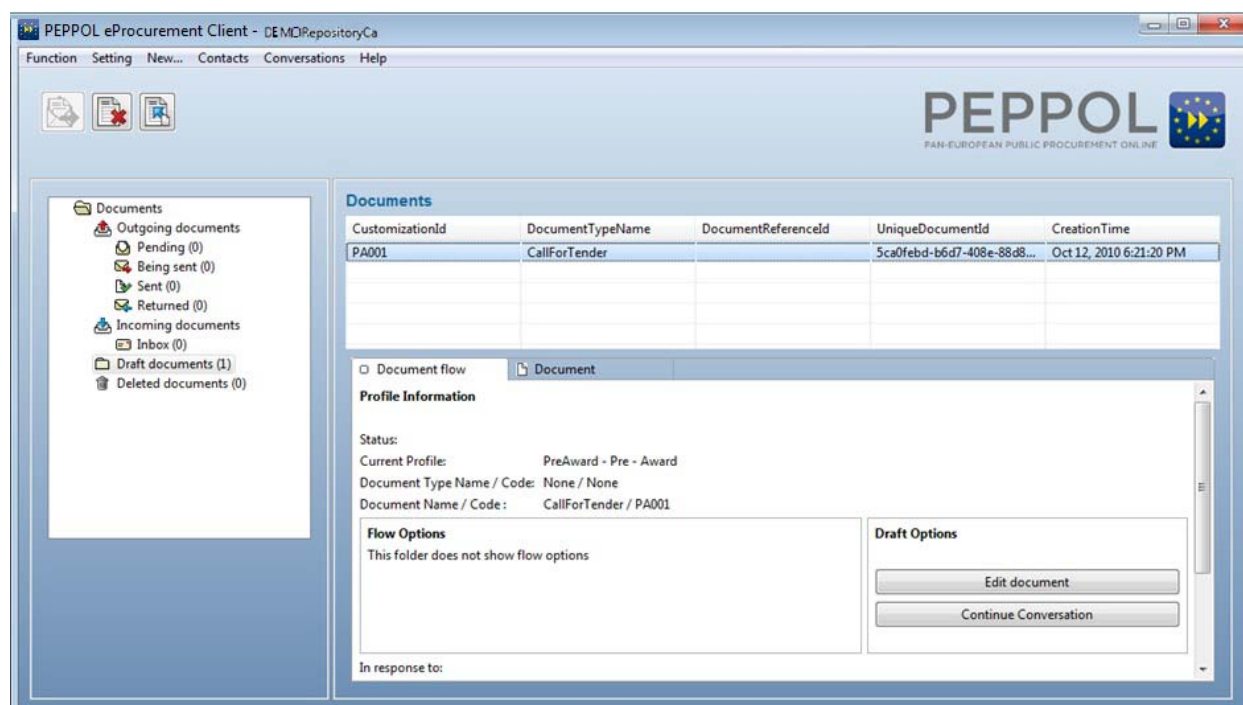


Figure 9: Displaying the document in the main interface

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

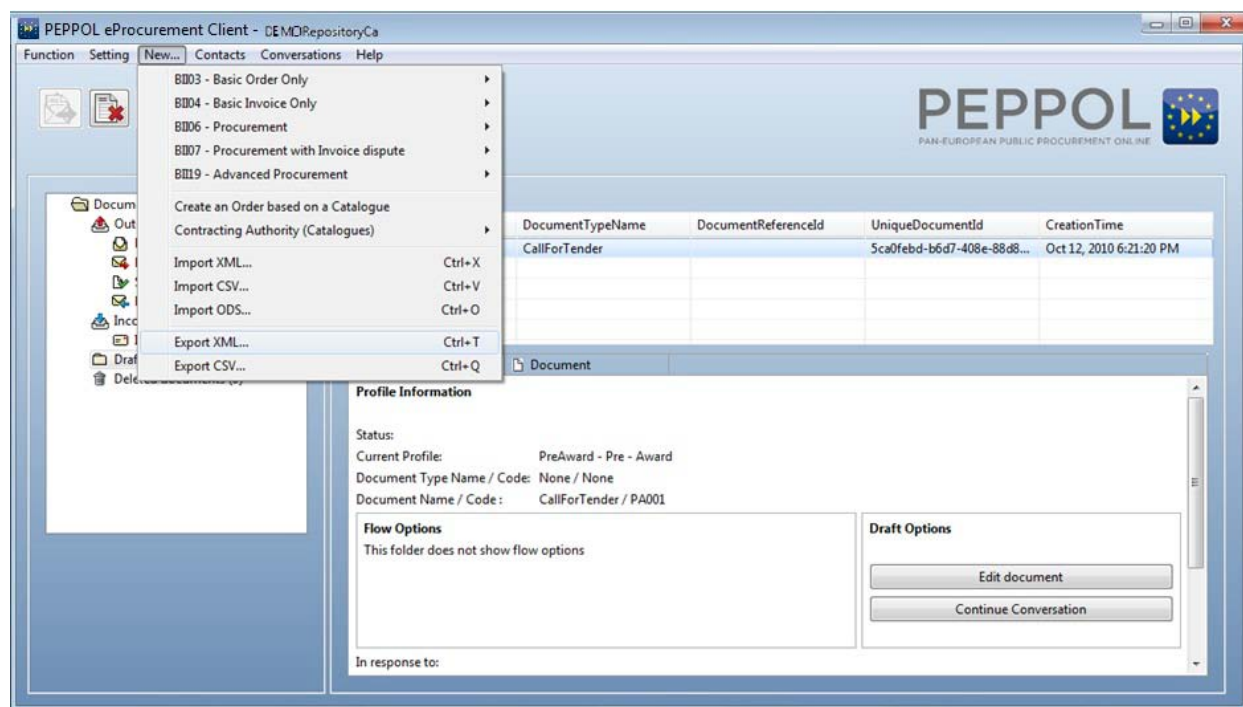


Figure 10: Export option

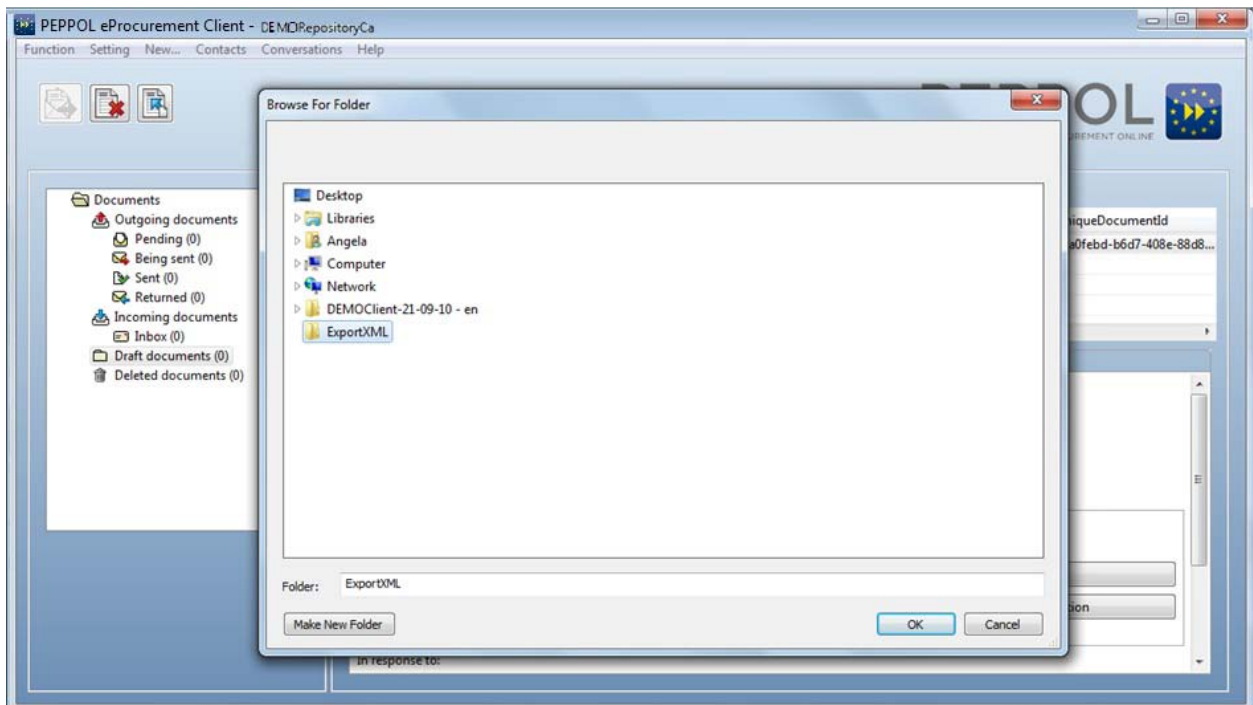


Figure 11: Export browsing

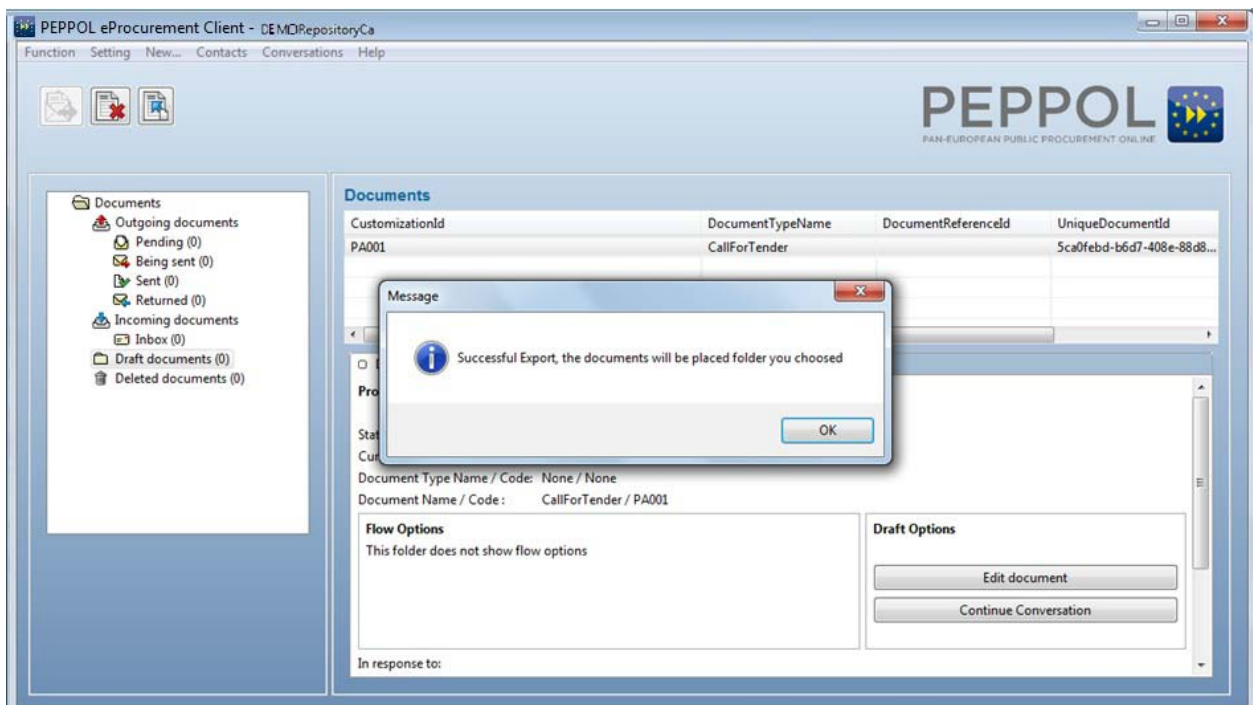


Figure 12: Message of the Export function

## Economic Operator (EcOp)

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

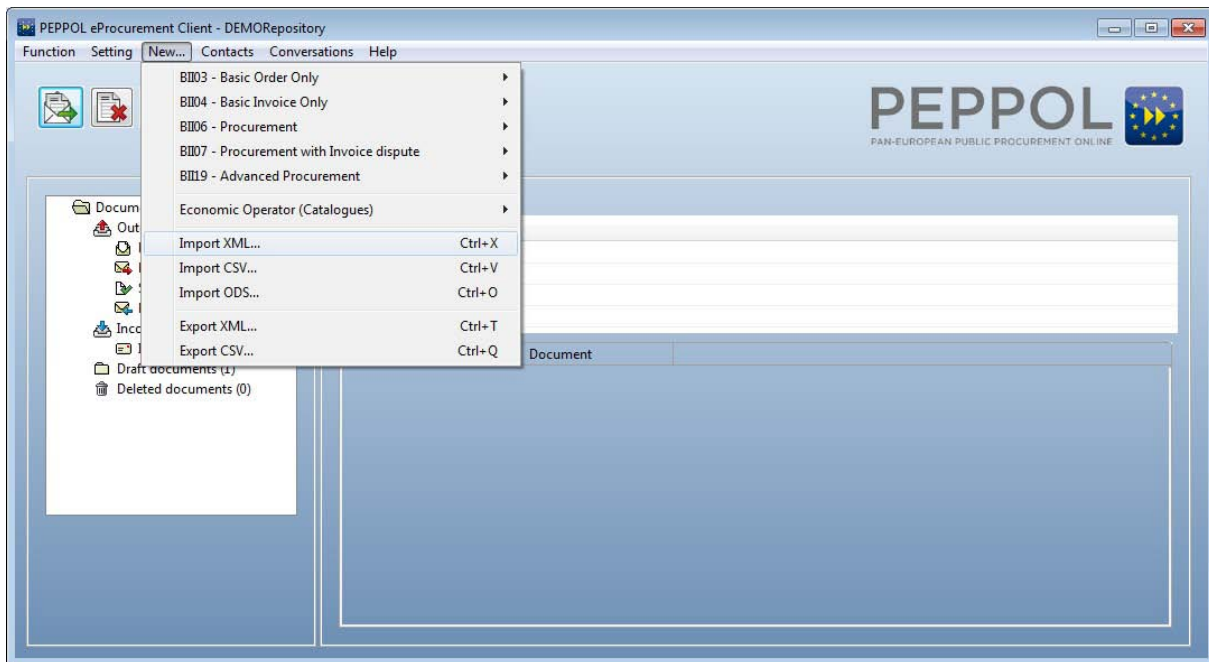


Figure 13: Import option

Select "Browse.." so it can be found the CallForTender document that will be imported.

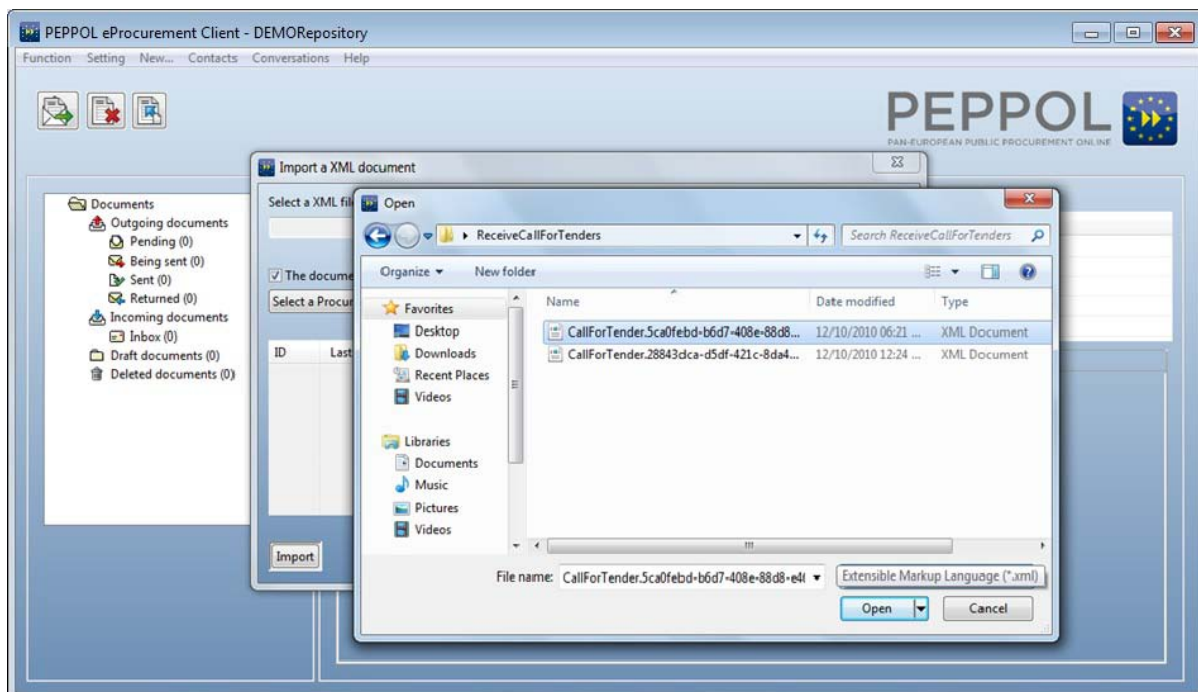


Figure 14: Import browsing

Then, select the Procurement it belong, in this case Pre – Award.

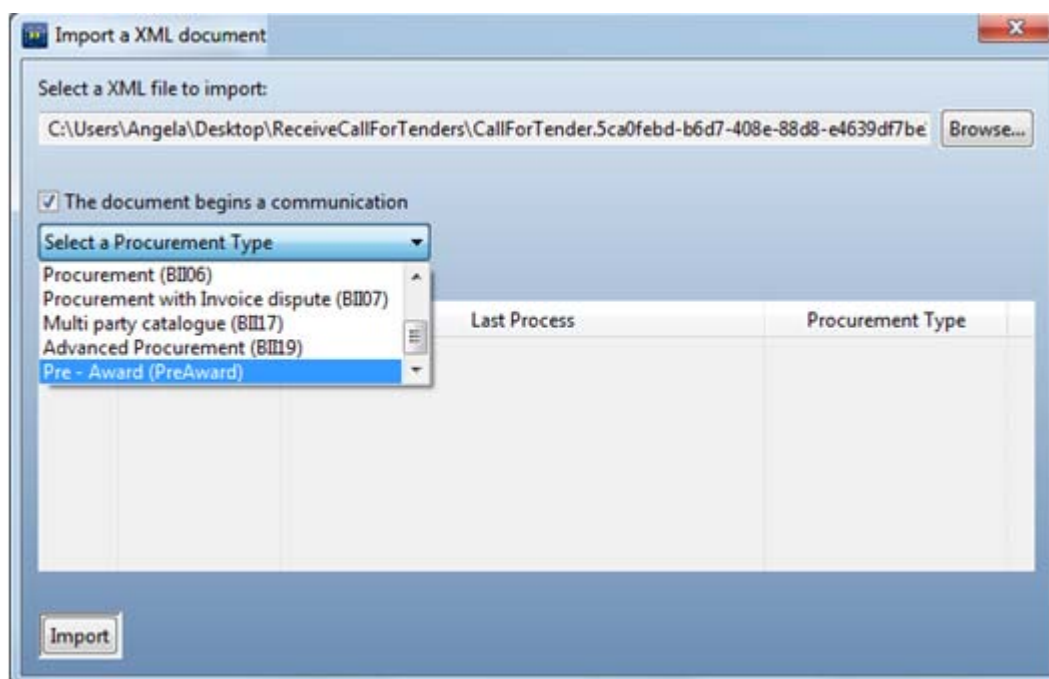


Figure 15: Selecting the correct procurement of the imported document

After this, press the Import button. It is important to check the message after pressing the button, because it informs the Document ID with the one the Client will work.

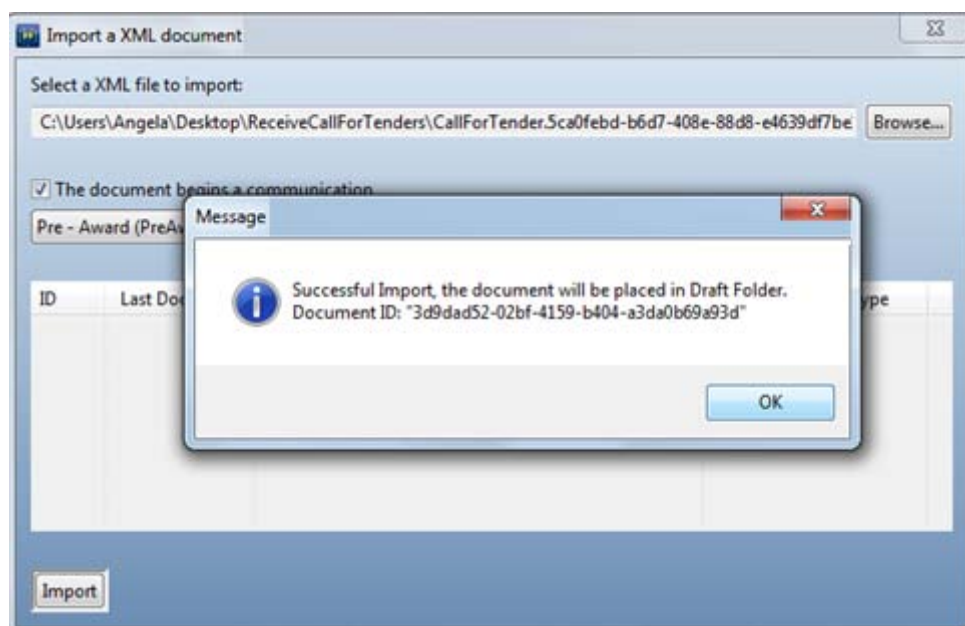


Figure 16: Message of the Importing function

Now the Client displays the imported document in the main interface.

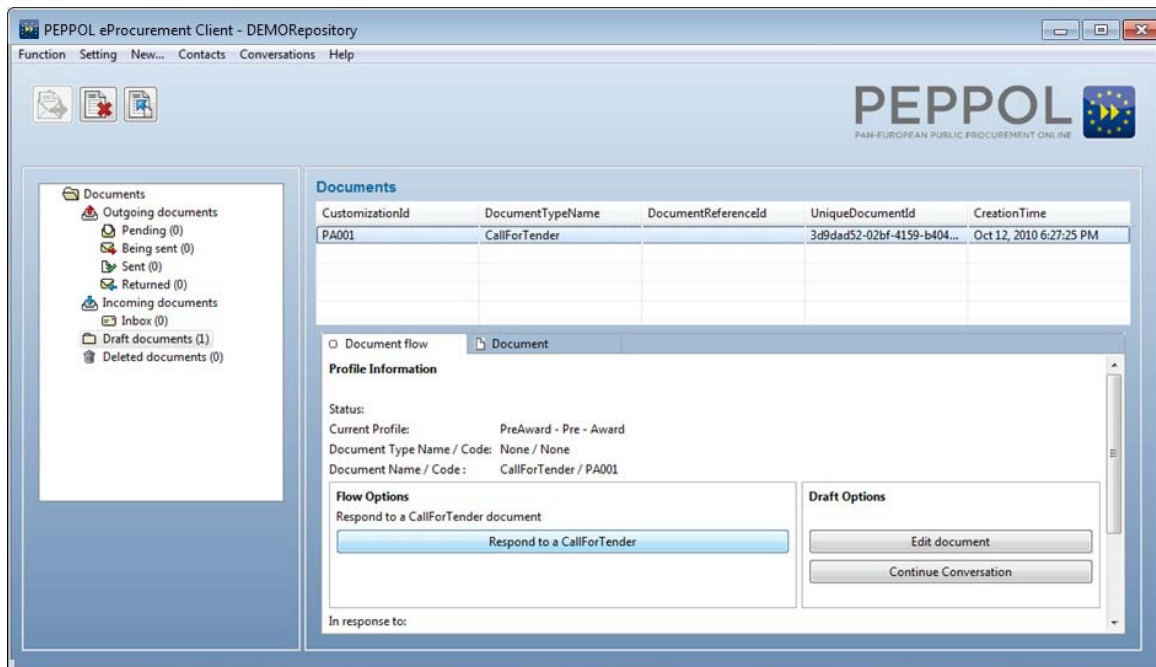


Figure 17: The Client shows the document in the Draft Folder

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

The screenshot shows the 'Tender' window with the 'New Document' tab. The left sidebar shows 'Create Documents' with a 'Draft Folder' button. The main area displays the 'Tender' form with the following sections:

- Details** (selected tab)
- Tenderer Party**
- Contracting Party**
- Tendered Project\***

**Principal Information**

Contract Folder ID:  Issue Date:

Period

Start Date:  End Date:

Save To Draft Folder

\*Required Fields

Figure 18: Detail tab form



The Tender document has already information taken from the CallForTender document. The **EcOp** can fill the missing information.

The screenshot shows the 'Tender' application window with the 'Tendering Party' tab selected. The form is titled 'Tendering Party' and includes a 'Read Contacts List' radio button. The 'Party' section has an 'Endpoint Id' field with the value 'sender business identifier'. The 'Party Identification' section has an 'Id.\*' field. The 'Party Name' section has a 'Name.\*' dropdown menu with 'Claudia Schmidt' selected. The 'Postal Address' section has an 'Id' field, a 'Street Name' field, a 'Post Box' field, and an 'Additional Street Name' field.

Field	Value
Endpoint Id	sender business identifier
Party Identification Id.*	
Party Name Name.*	Claudia Schmidt
Postal Address Id	
Street Name	
Post Box	
Additional Street Name	

Figure 19: Tendering Party tab form

The screenshot shows the 'Tender' application window with the 'Contracting Party' tab selected. The form is titled 'Contracting Party' and includes a 'Read Contacts List' radio button. The 'Party' section has an 'Endpoint Id' field with the value 'sender business identifier'. The 'Party Identification' section has an 'Id.\*' field with the value 'PartyIdentification ID'. The 'Party Name' section has a 'Name.\*' dropdown menu with 'Michael Johnsson' selected. The 'Postal Address' section has an 'Id' field with the value 'TestID', a 'Street Name' field with the value 'Street Name Test', a 'Post Box' field with the value 'PB654', and an 'Additional Street Name' field with the value 'Additional street name'.

Field	Value
Endpoint Id	sender business identifier
Party Identification Id.*	PartyIdentification ID
Party Name Name.*	Michael Johnsson
Postal Address Id	TestID
Street Name	Street Name Test
Post Box	PB654
Additional Street Name	Additional street name

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 one row containing '1' and '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

This screenshot shows the same 'Tender' application window, but with the 'Line ID : 1' section expanded for editing. It contains several input fields for 'Id', 'Reference Id', 'Note', 'Orderable Unit', 'Content Unit', and 'Quantity'. The 'Id' field is pre-filled with '1' and the 'Content Unit' with '10'.

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

Line ID : 1

Line

Id*	<input type="text" value="1"/>	Reference Id:	<input type="text"/>
Note:	<input type="text"/>	Orderable Unit:	<input type="text"/>
Content Unit*	<input type="text" value="10"/>	Quantity:	<input type="text"/>

Figure 22: Editing a Tender Line



The **EcOp** can also create new Tender Lines.

The screenshot shows the 'Tender' application window with a 'New Document' form. On the left, a 'Create Documents' sidebar contains a 'Draft Folder' and a file named 'Tender.fed06ec5-66fe-4fbd-bc38'. The main form has a table at the top with columns 'Edit', 'Delete', 'Id', and 'Item Name'. The first row has '1' in the 'Id' column and 'name' in the 'Item Name' column. Below the table are 'new Tender Line' and 'hide form' buttons. The 'New Line' section contains several input fields: 'Id:\*' (empty), 'Reference Id:' (empty), 'Note:' (empty), 'Orderable Unit:' (empty), 'Content Unit:\*' (filled with '10'), 'Quantity:' (empty), 'Minimum Order Quantity:' (empty), 'Maximum Order Quantity:' (empty), and 'Warranty Information:' (empty). At the bottom, there are dropdown menus for 'Offered Item Location Quantity' and 'Item'.

Figure 23: Creating a new Tender Line

Press Save to Draft Folder to add new Tender Lines and save the all document.

This screenshot shows the same 'Tender' application window, but with the 'Id' field filled with '1'. A 'Message from webpage' dialog box is displayed in the center, showing a yellow warning icon and the text 'Document Saved in Draft Folder' with an 'OK' button. The 'Save To Draft Folder' button is visible at the bottom of the form. The rest of the form fields and the sidebar are the same as in Figure 23.

Figure 24: Saving the Tender in Draft document

## 5. Post - Award Phase

### Economic Operator (EcOp)

**EcOp** starts the transaction creating the Catalogue document

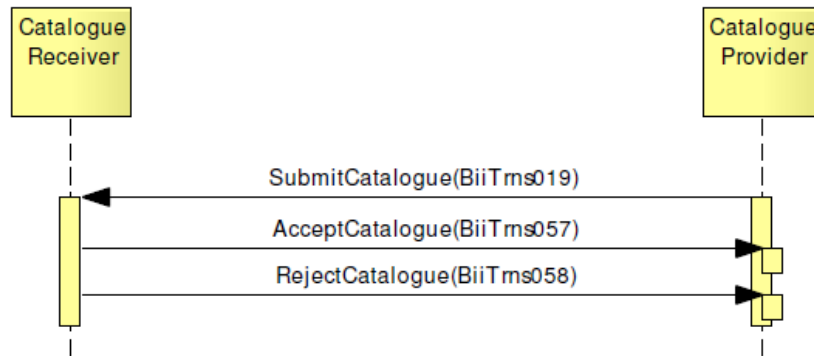


Figure 25: Graphic provided from CenBii (Bii01 Catalogue Only)

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

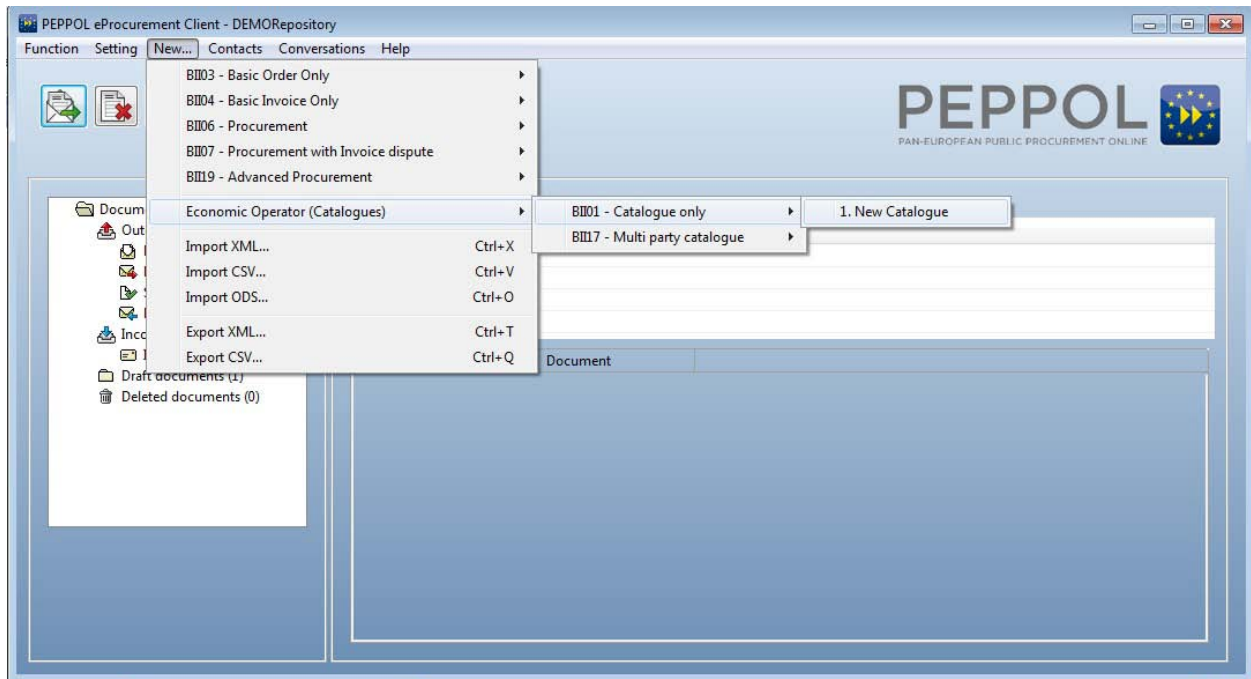


Figure 26: Selecting the New Catalogue option

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 'Details' tab selected. The form is titled 'Catalogue' and has a 'New Document' button. On the left, there is a 'Create Documents' section with a 'Draft Folder' button. The main form area contains the following fields:

- Name:** Furniture Catalogue
- Version Id:** SC001
- Issue Date:** (Mandatory field, marked with \*)
- Validity Period:**
  - Start Date:** (Mandatory field, marked with \*)
  - End Date:** (Mandatory field, marked with \*)
- Referenced Contract:**
  - Id:** (Mandatory field, marked with \*)
  - Contract Type:** ReferencedContractContra
- Seller Supplier:** (Dropdown menu)

Figure 27: Detail tab form

This screenshot shows the 'Catalogue' application window with the 'Details' tab selected, focusing on the 'Seller Supplier' section. The 'Validity Period' and 'Referenced Contract' sections are visible above. The 'Seller Supplier' section includes the following fields and options:

- Read Contacts List** (selected) / **New Contact** (radio buttons)
- Endpoint Id:** sender business identifier
- Party Identification:**
  - Id:** (Mandatory field, marked with \*)
  - Postal Address:** (Dropdown menu)
  - Party Tax Scheme:** (Dropdown menu)
  - Party Legal Entity:** (Dropdown menu)
  - Contact:** (Dropdown menu)
  - Person:** (Dropdown menu)
- Party Name:**
  - Name:** (Mandatory field, marked with \*)
  - Dropdown menu showing: Michael Johnsson, Select a Name, Michael Johnsson (highlighted), Claudia Schmidt

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

Party Identification

Id.\*: Party CCP ID

Postal Address  
Party Tax Scheme  
Party Legal Entity  
Contact  
Person

Endpoint Id: sender business identifier

Party Name

Name.\*: Claudia Schmidt

Select a Name  
Michael Johnsson  
Claudia Schmidt

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

**Catalogue**

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

Select a Name  
Michael Johnsson  
Claudia Schmidt

Postal Address: Claudia Schmidt

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

Figure 30: Provider Party tab form

**Catalogue**

New Document

Create Documents

Draft Folder

Details Provider Party Receiver Party Catalogue Line

Receiver Party

Read Contacts List New Contact

Party

Endpoint Id: sender business identifier

Party Identification

Id: Party identification Receiv

Party Name

Name: Claudia Schmidt

Select a Name

Michael Johnsson

Postal Address: Claudia Schmidt

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 products.

**Catalogue**

New Document

Create Documents

Draft Folder

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

**Catalogue**

Details Provider Party Receiver Party Catalogue Line

**Price, Lead Time and Delivery Address**

**Price**

Price Amount.\*  Currency Id.\*

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

City Name

Postal Zone

Country Subentity

Region

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

**Create Documents**

[Draft Folder](#)

Id:

Address Type Code:

City Name:

Street Name:

Postal Zone:

Additional Street Name:

Country Subentity:

Building Number:

Region:

Country Identification Code:

[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

**Create Documents**

[Draft Folder](#)

[Item](#)

Description:

Pack Quantity:

Pack Size Numeric:

Name:

Hazardous Risk Indicator:

Keyword:

Brand Name:

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

Comodity Classification\*

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



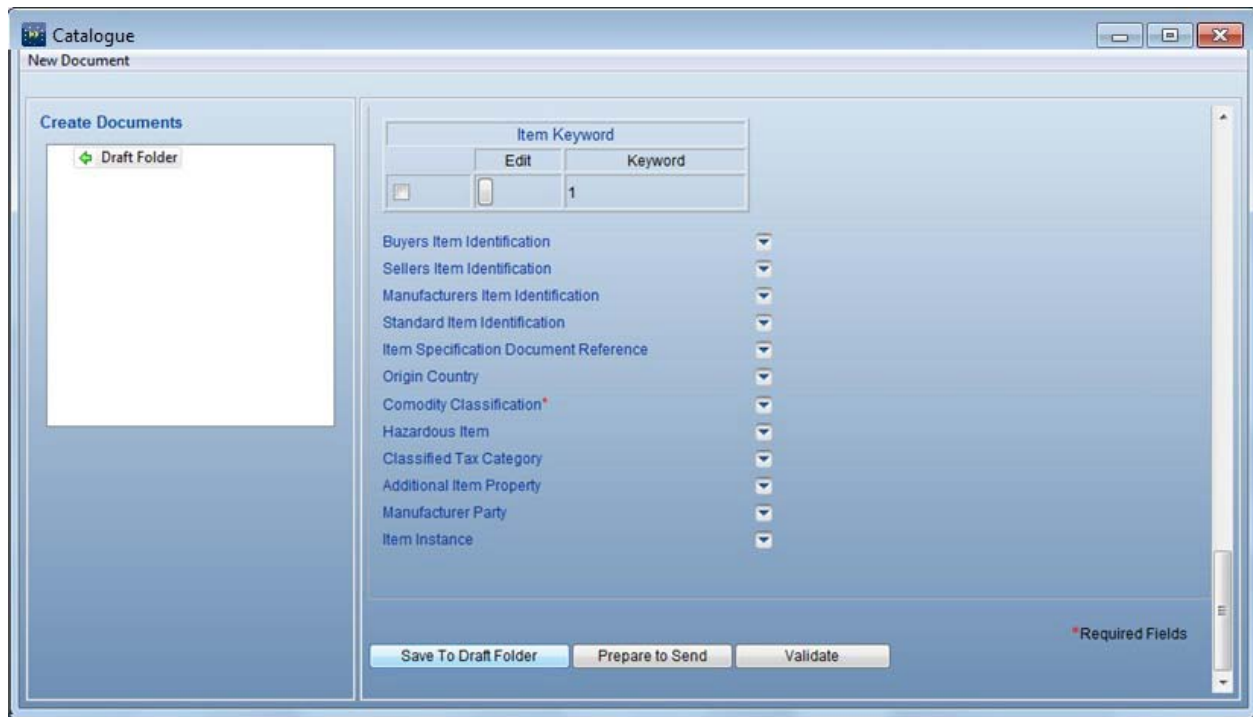


Figure 37: Details groups

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.

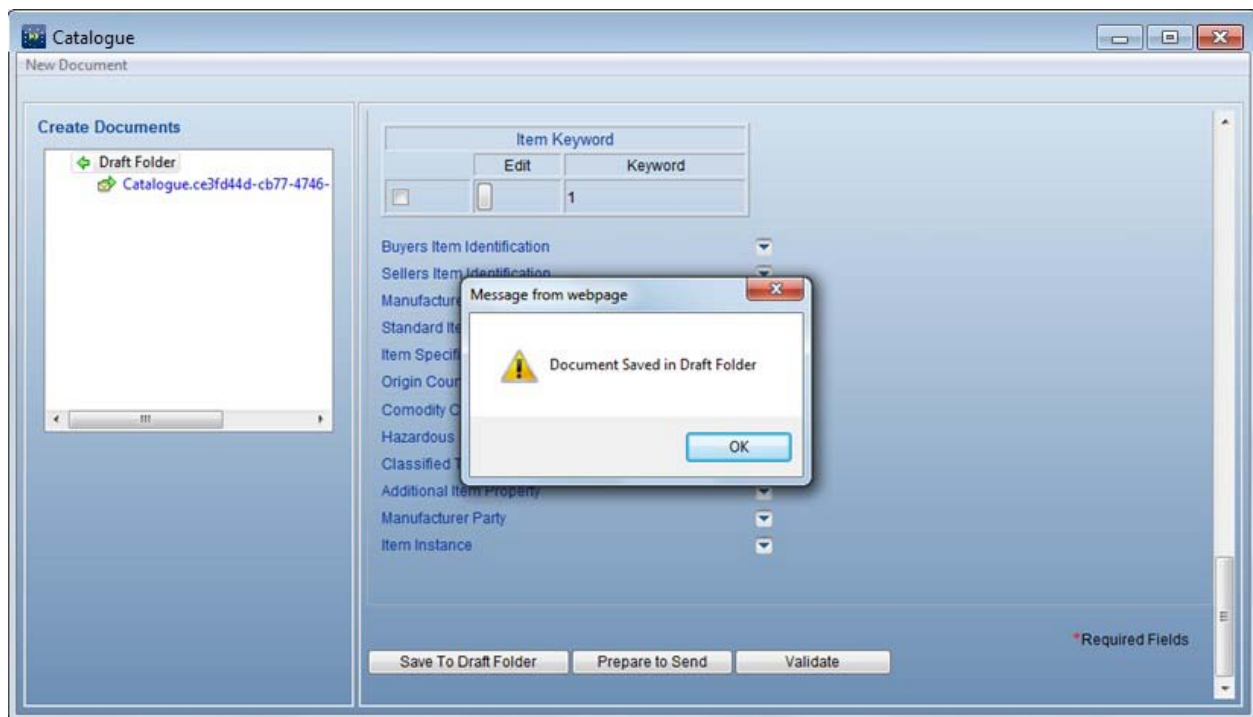


Figure 38: Saving the Catalogue in Draft Folder



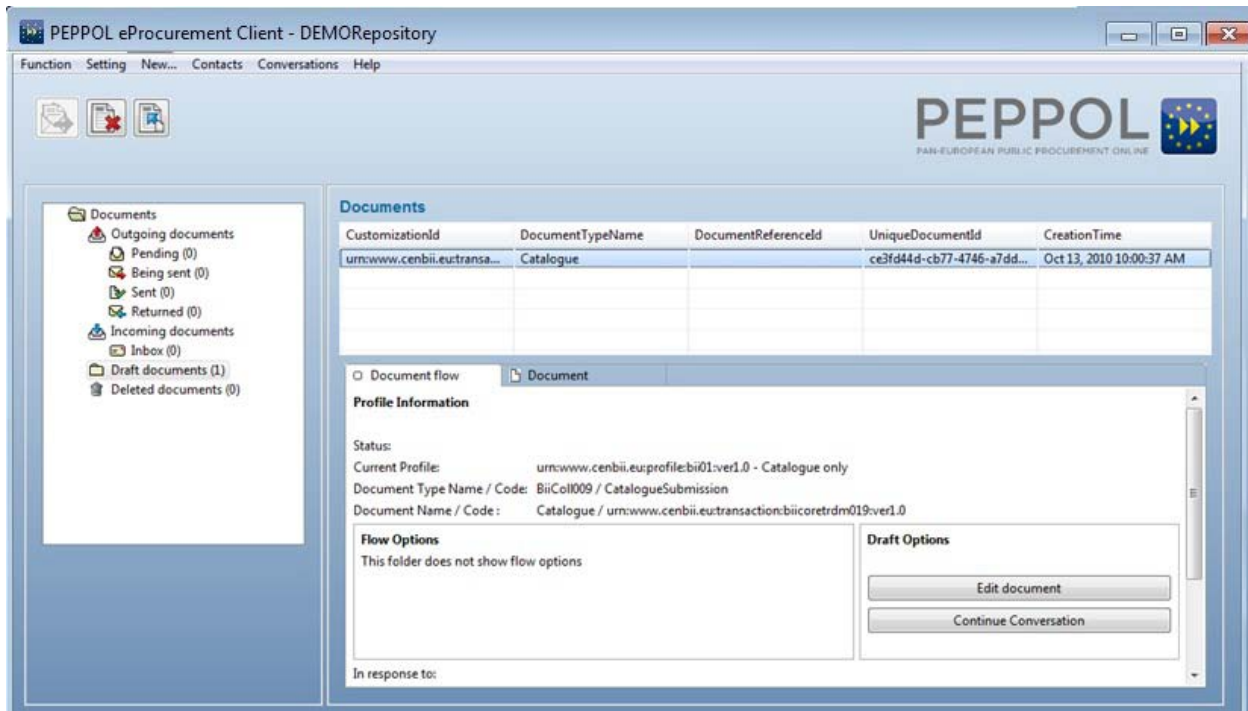


Figure 39: The Client shows the document in the Draft Folder

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

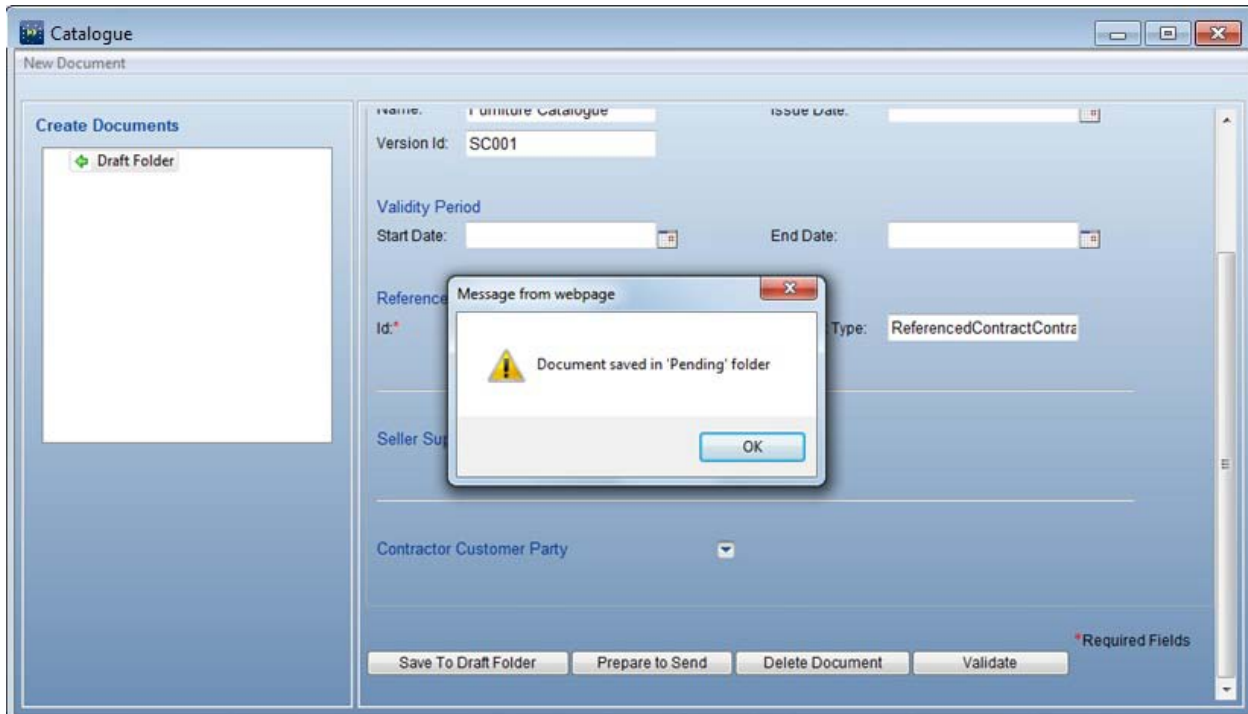


Figure 40: Saving the Catalogue in the Pending Folder

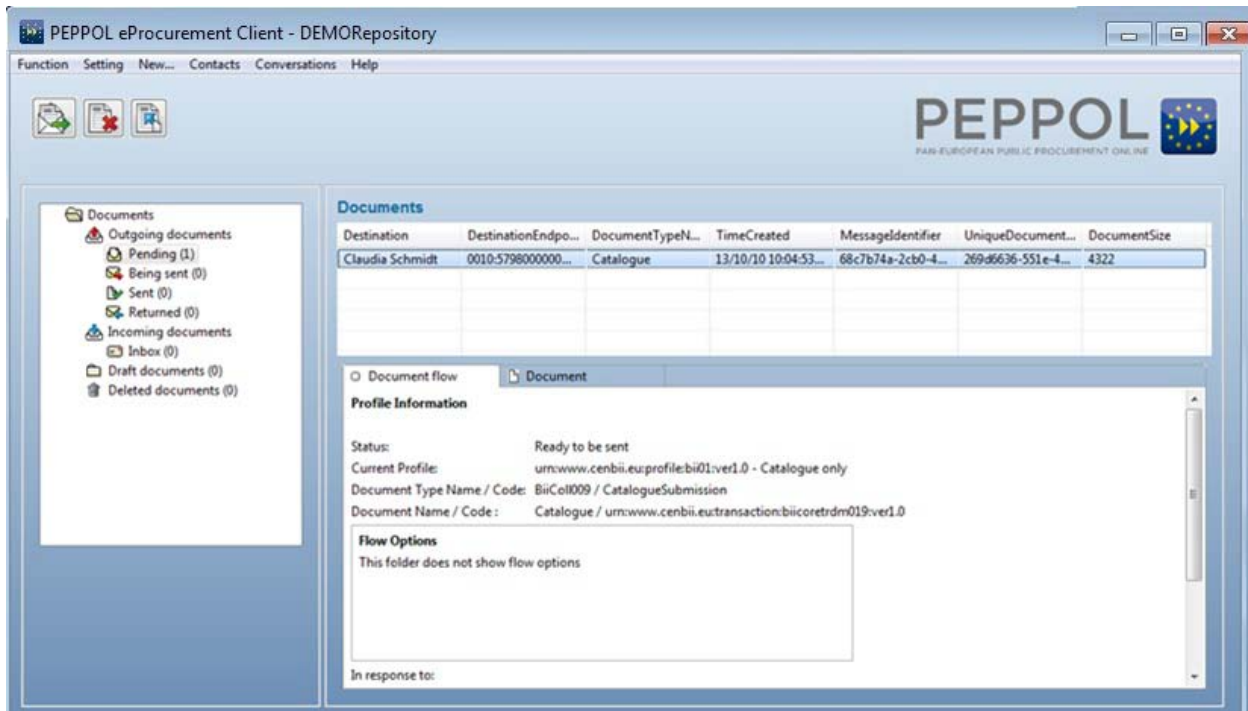


Figure 41: The Client shows the document in the Pending Folder

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

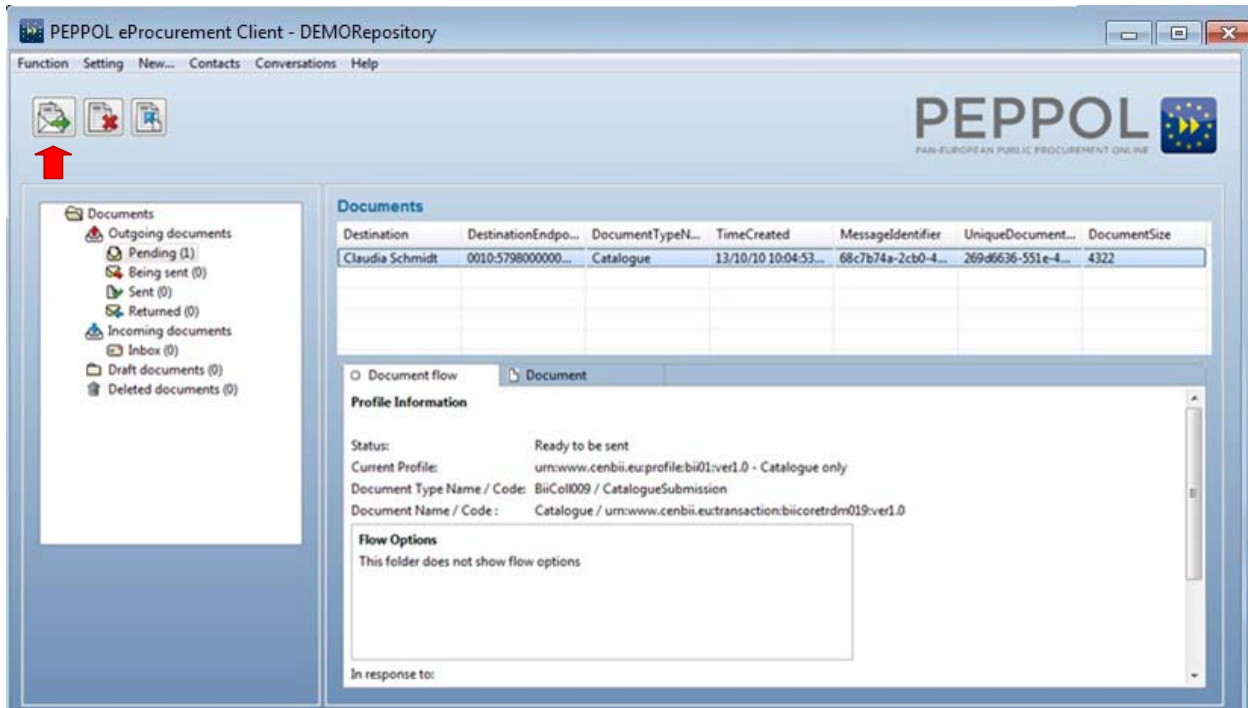


Figure 42: Pressing the Send button

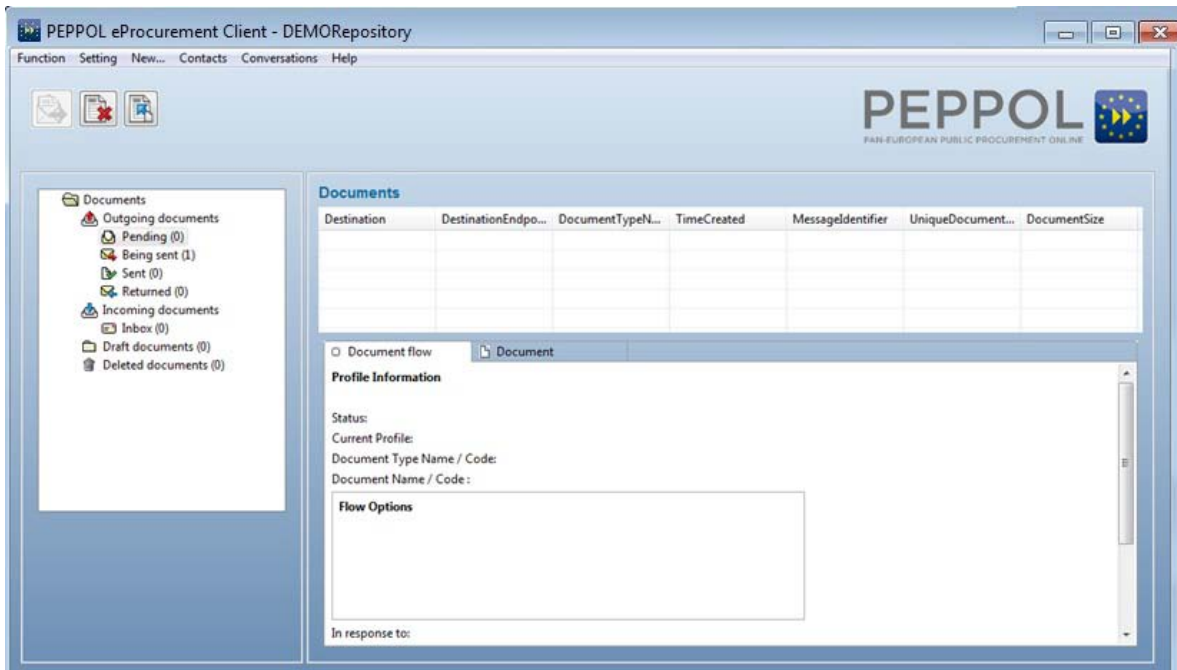


Figure 43: Document in Being Sent Folder

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

Note the Client informs that the next step is to **receive** and **AcceptCatalogue** or a **RejectCatalogue** from the **Ca** party.

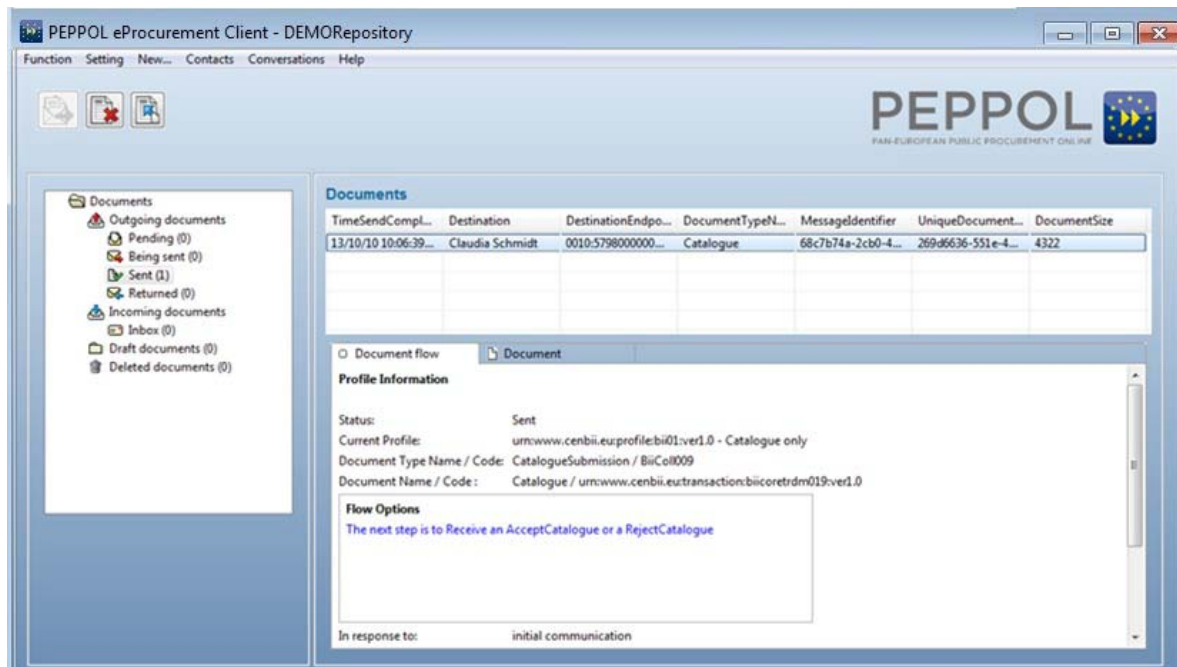


Figure 44: Document in Sent Folder

## Contracting Authority (Ca)

**Ca** starts the transaction receiving the Catalogue document.

The default tab selected is Document Flow, where the **Ca** can see the main information of the communication and the options of the next steps it can follow.

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 the Client displays it in a different window).

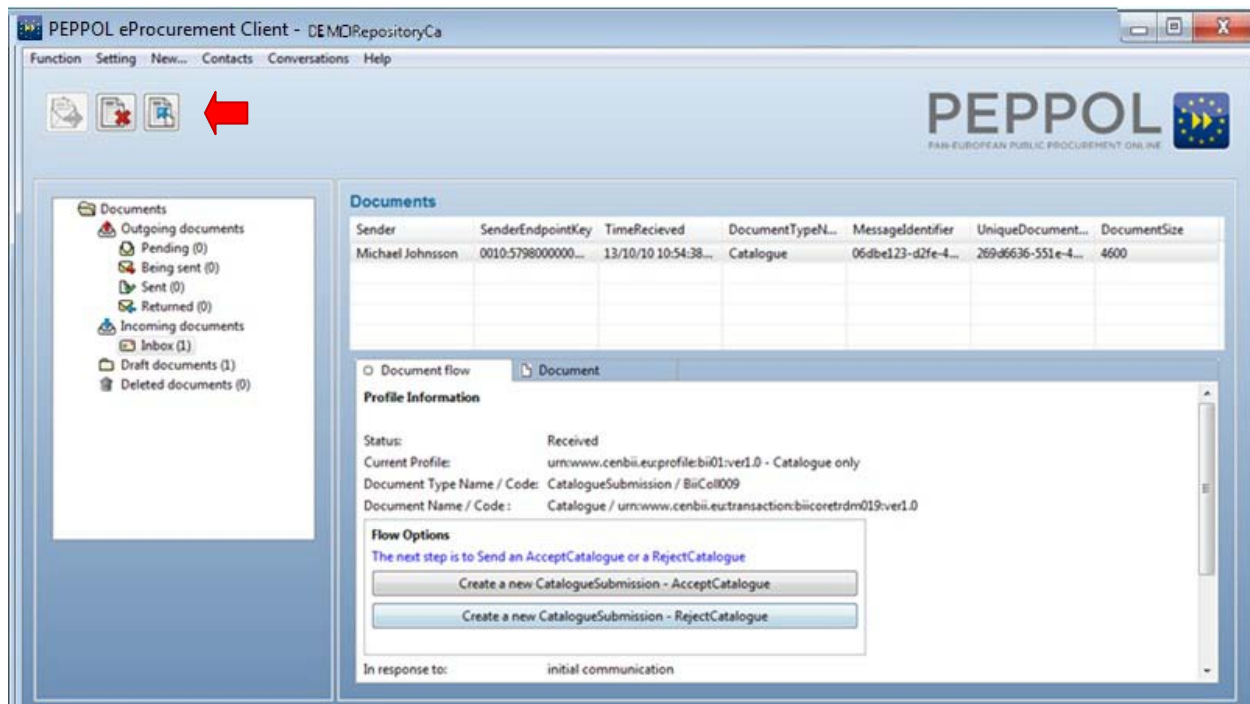


Figure 45: Pressing the Show button to display the document in a different window

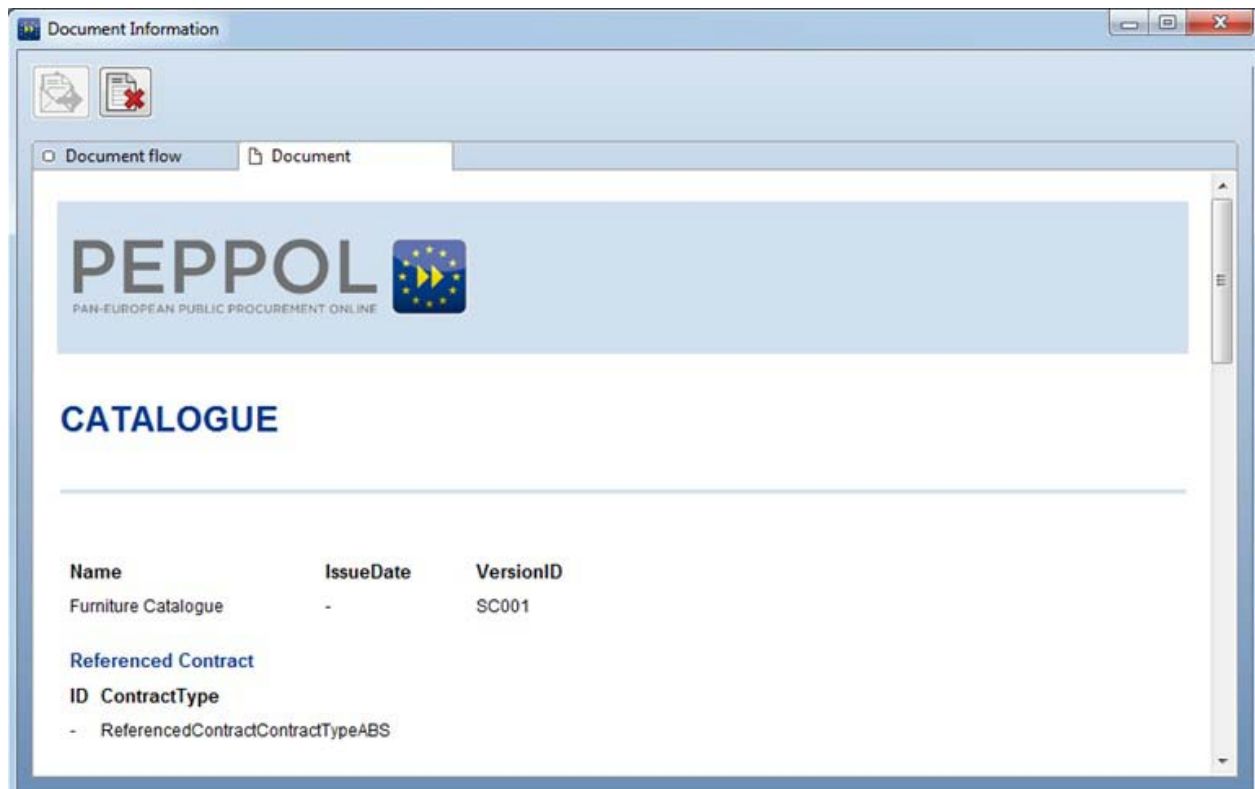


Figure 46: Displaying the document in HTML form

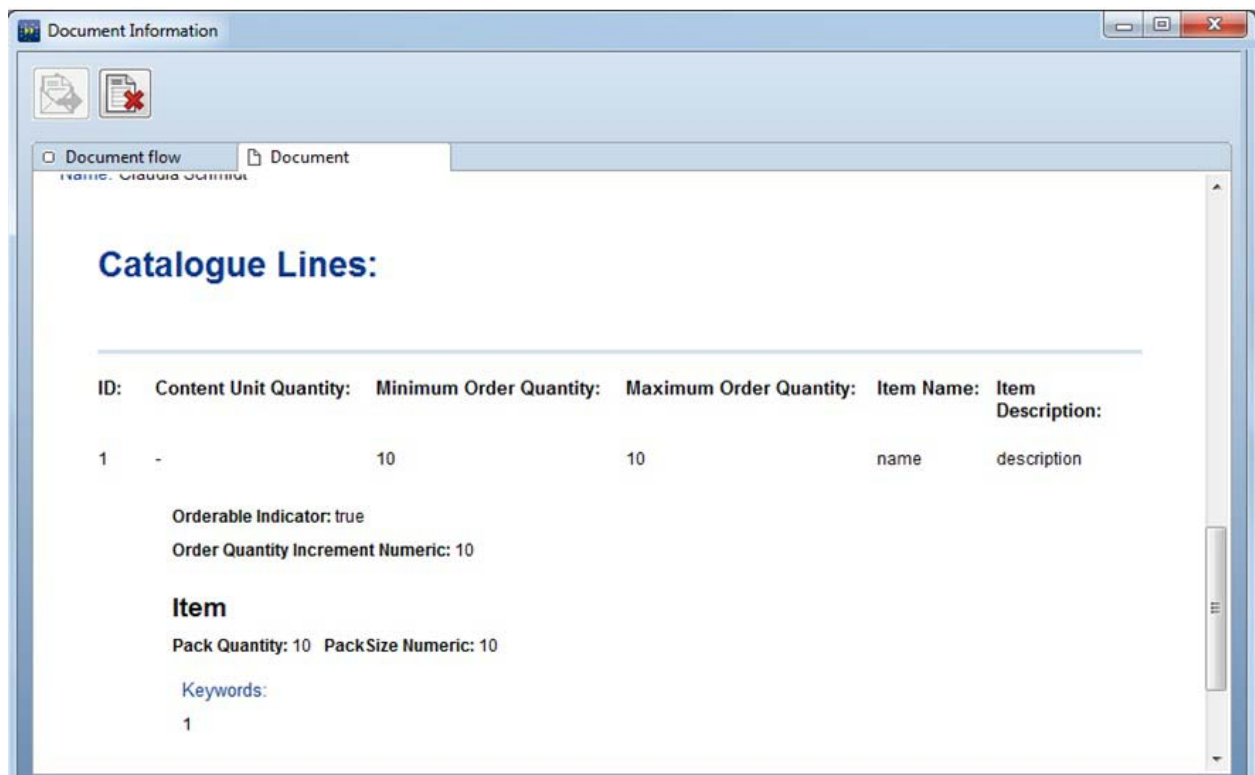


Figure 47: Displaying the document in HTML form



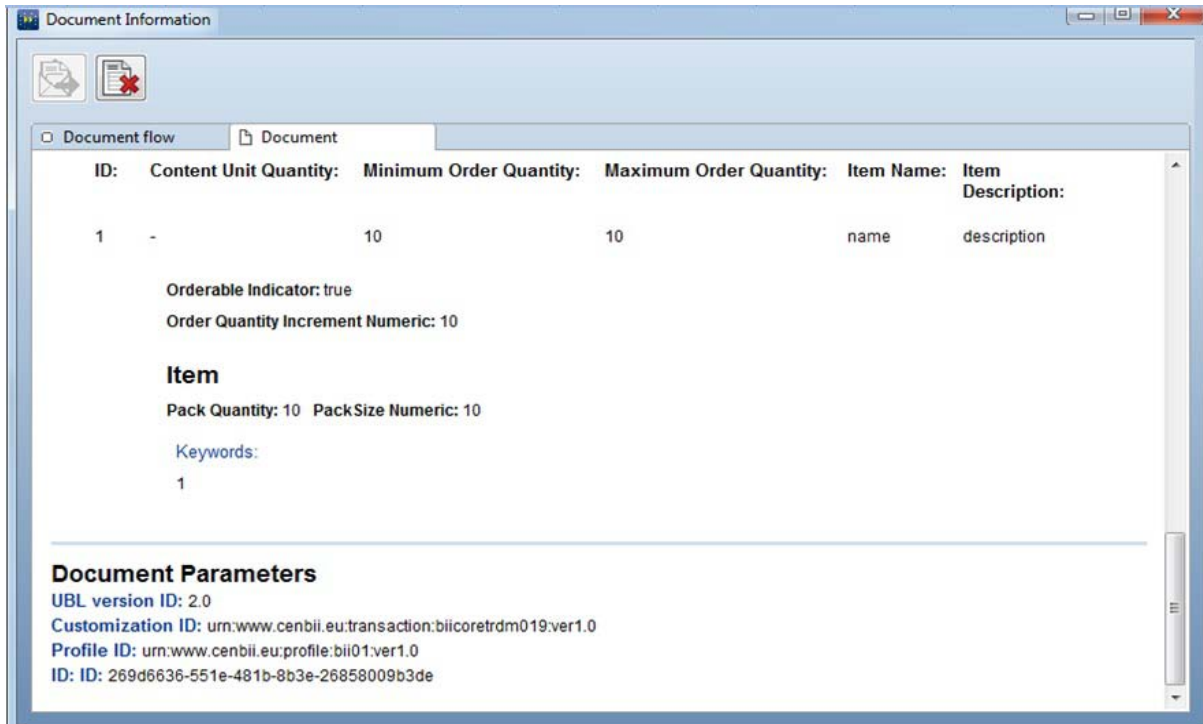


Figure 48: Displaying the document in HTML form

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

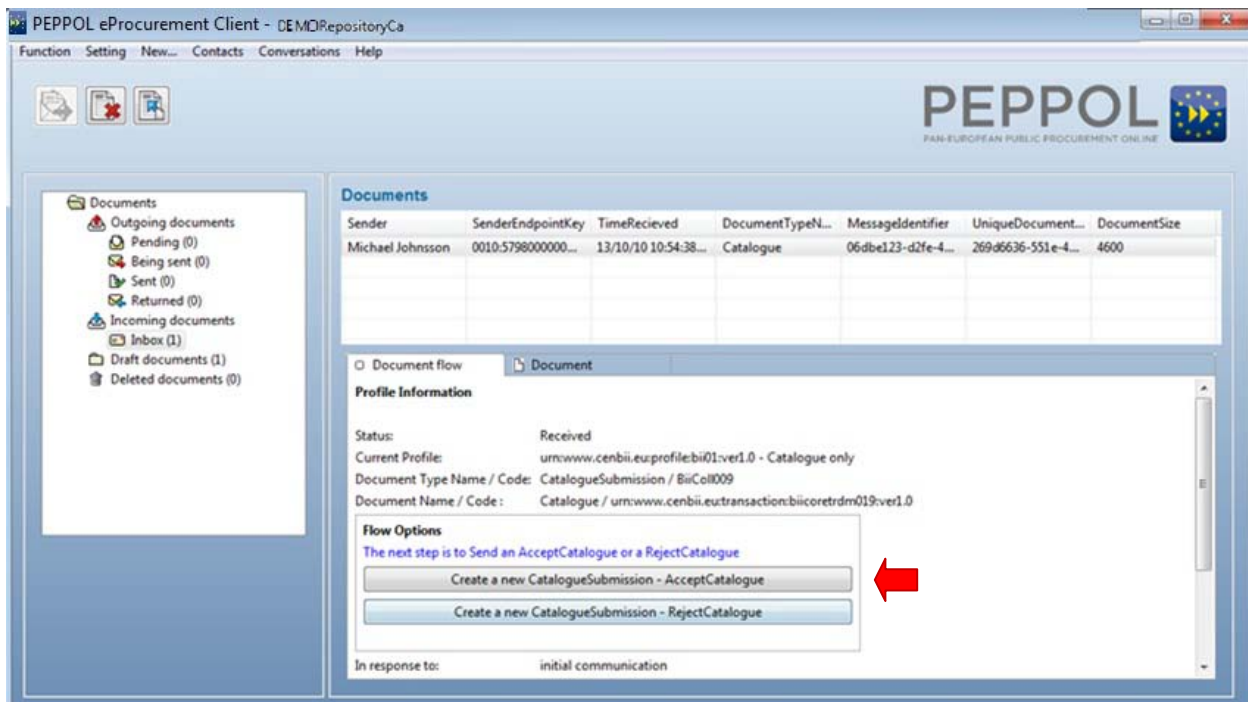


Figure 49: Creating an AcceptCatalogue to continue with the flow

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

**Accepted Catalogue**

New Document

Create Documents

Draft Folder

**Accept Catalogue**

Details

Catalogue Details

Issue Date:  \* Issue Time: 10:20:20

Note: Free-form text applying to

Sender Party

☒ Read Contacts List ☐ New Contact

Endpoint Id:

Party Identification:

Id: 68KJ646 \* Name:  \*

Receiver Party:

☒ Read Contacts List ☐ New Contact

Endpoint Id: 0010:5798000000777

Party Identification

Party Name

Figure 50: Selecting the Sender Party

**Accepted Catalogue**

New Document

Create Documents

Draft Folder

Party Identification:

Id: 68KJ646 \* Name: Claudia Schmidt \*

Receiver Party:

☒ Read Contacts List ☐ New Contact

Endpoint Id:

Party Name

Id: 1567DFS8670 \* Name:  \*

Document Response

Reference Id: Line 12 \* Reference Code: AP

Description: The descriptor 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 (ready to send).

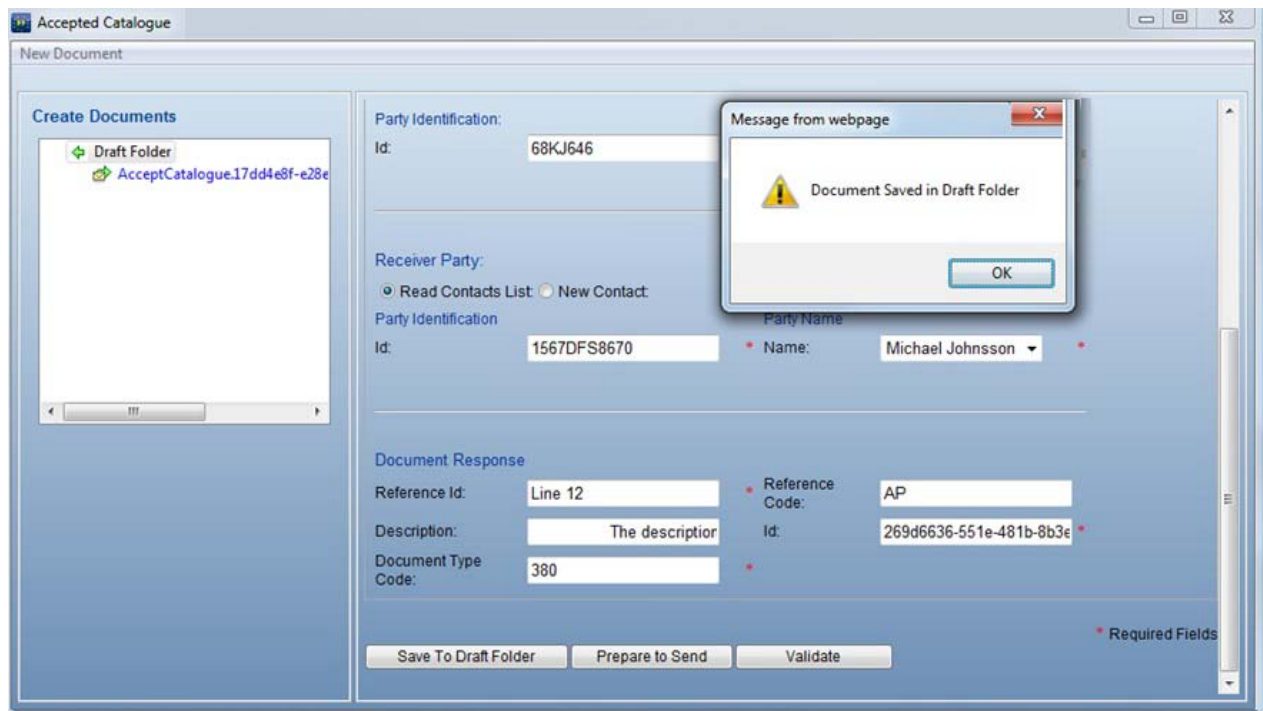


Figure 52: Saving the document in the Draft Folder

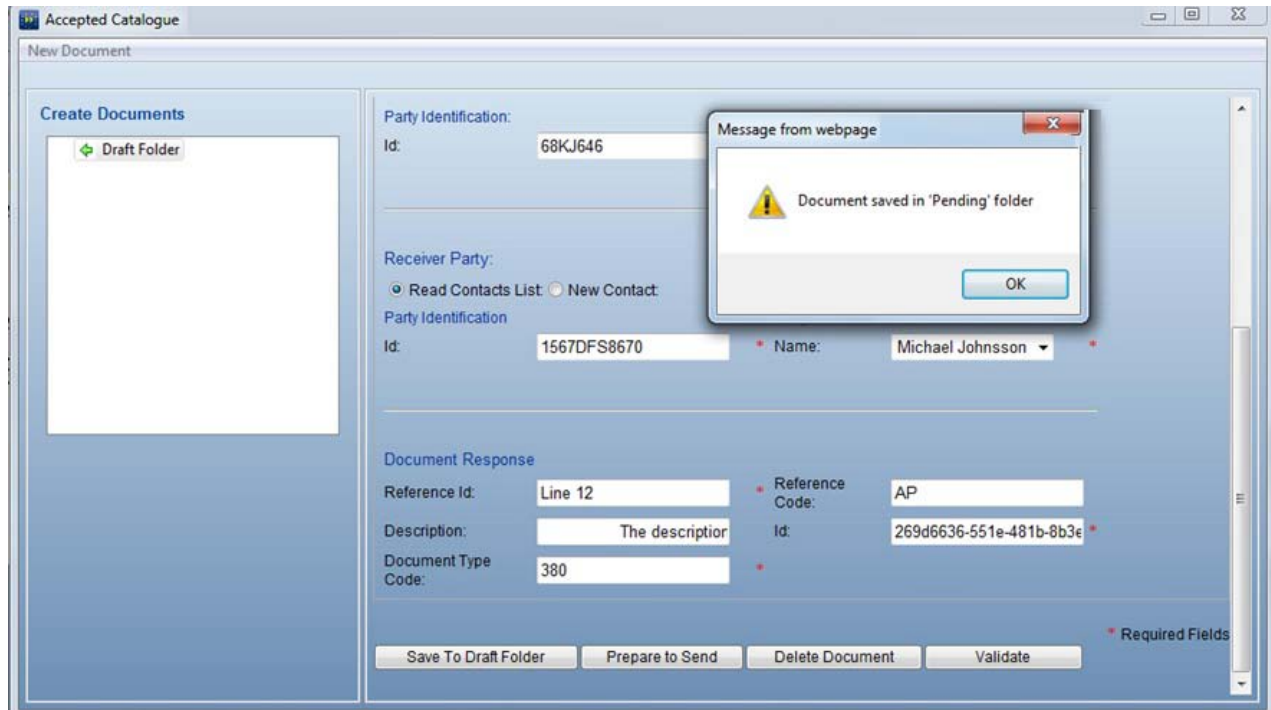


Figure 53: Saving the document in the Pending Folder



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

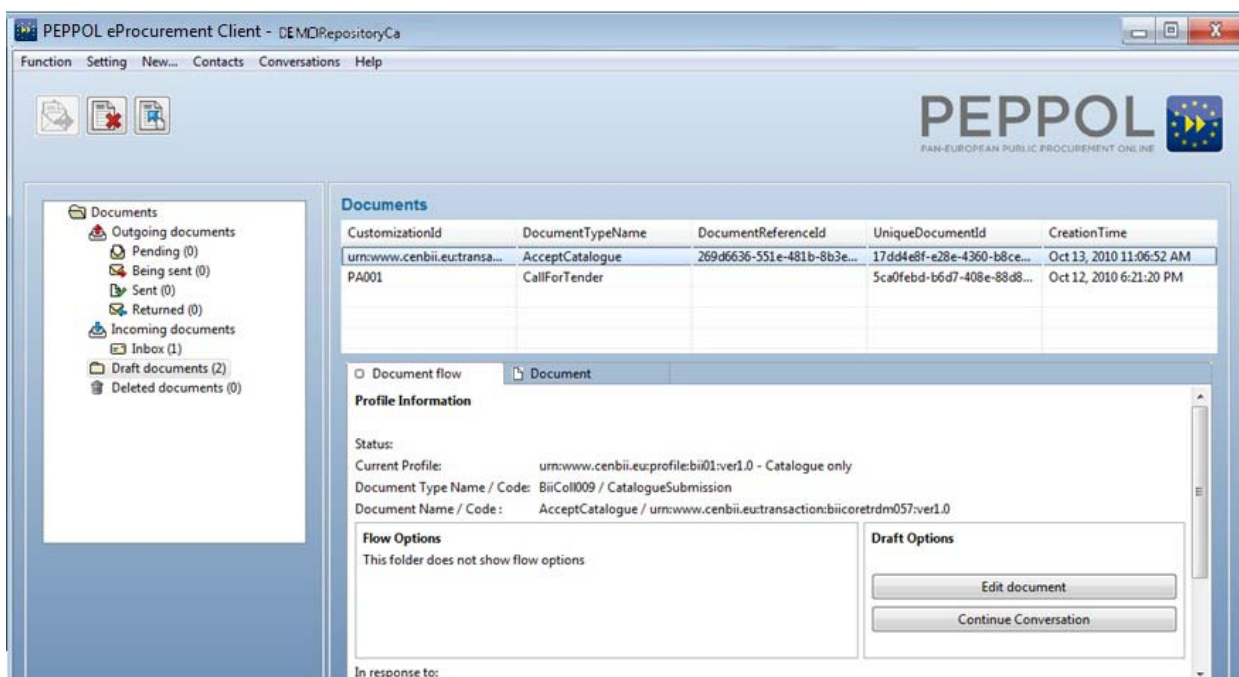


Figure 54: The Client shows the document in the Draft Folder

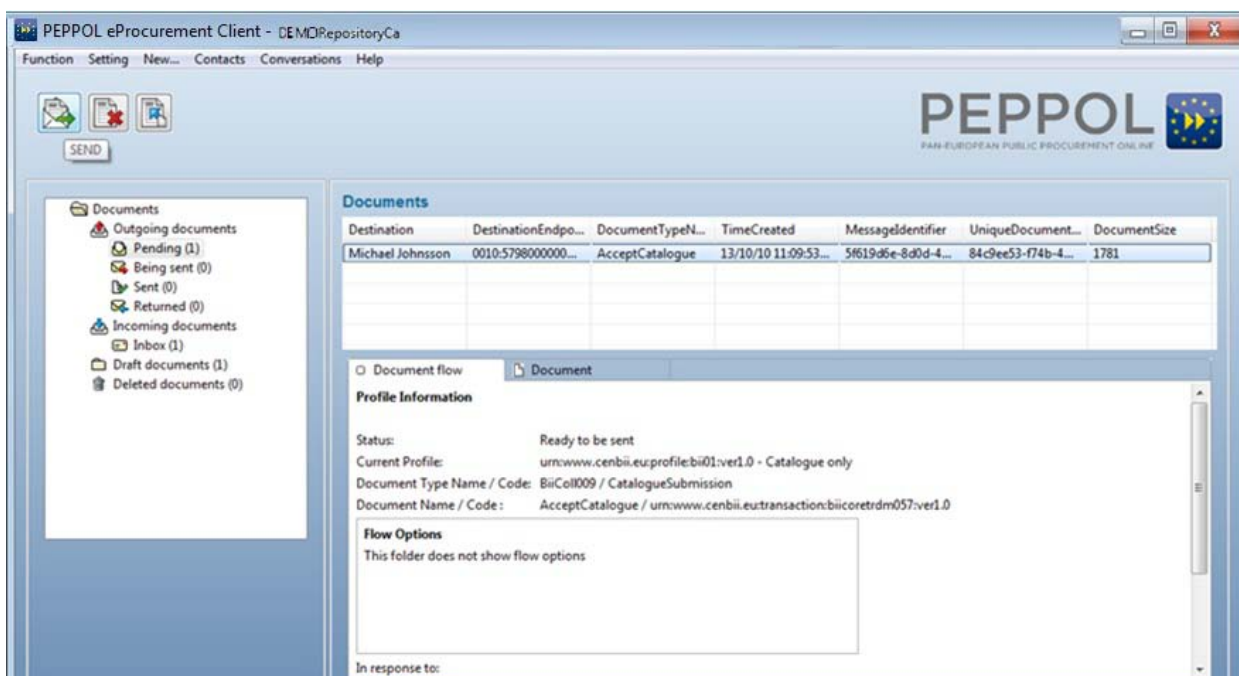


Figure 55: The Client shows the document in the Pending Folder

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

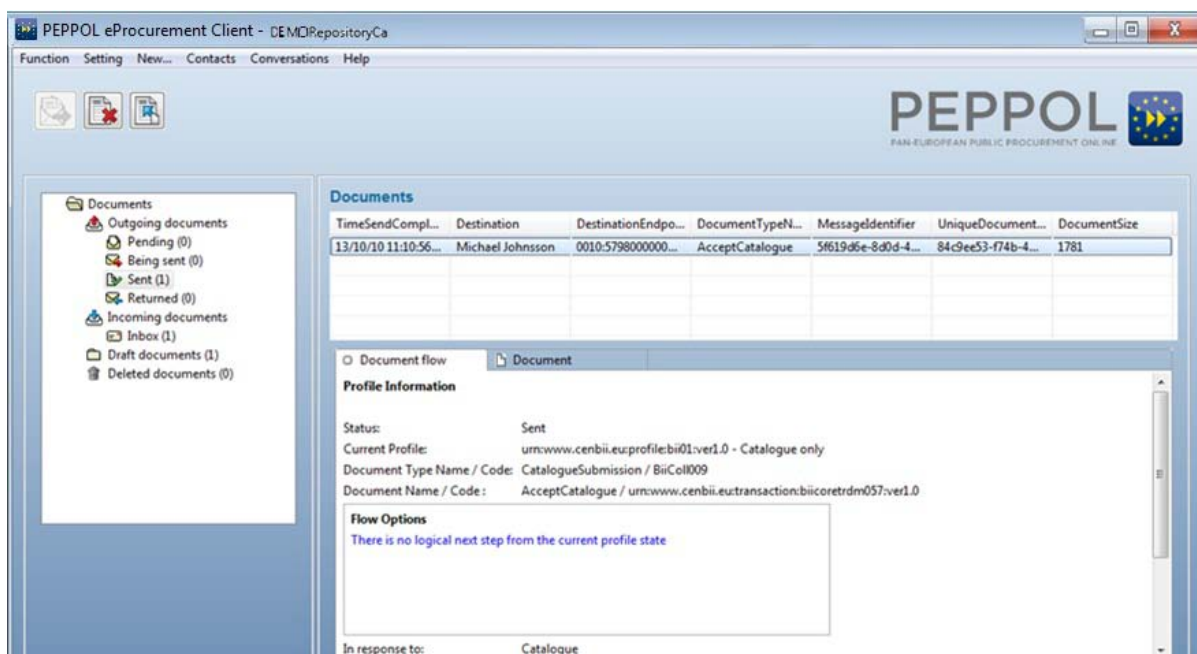


Figure 56: The document was sent and placed in the Sent Folder

## Economic Operator (EcOp)

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

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

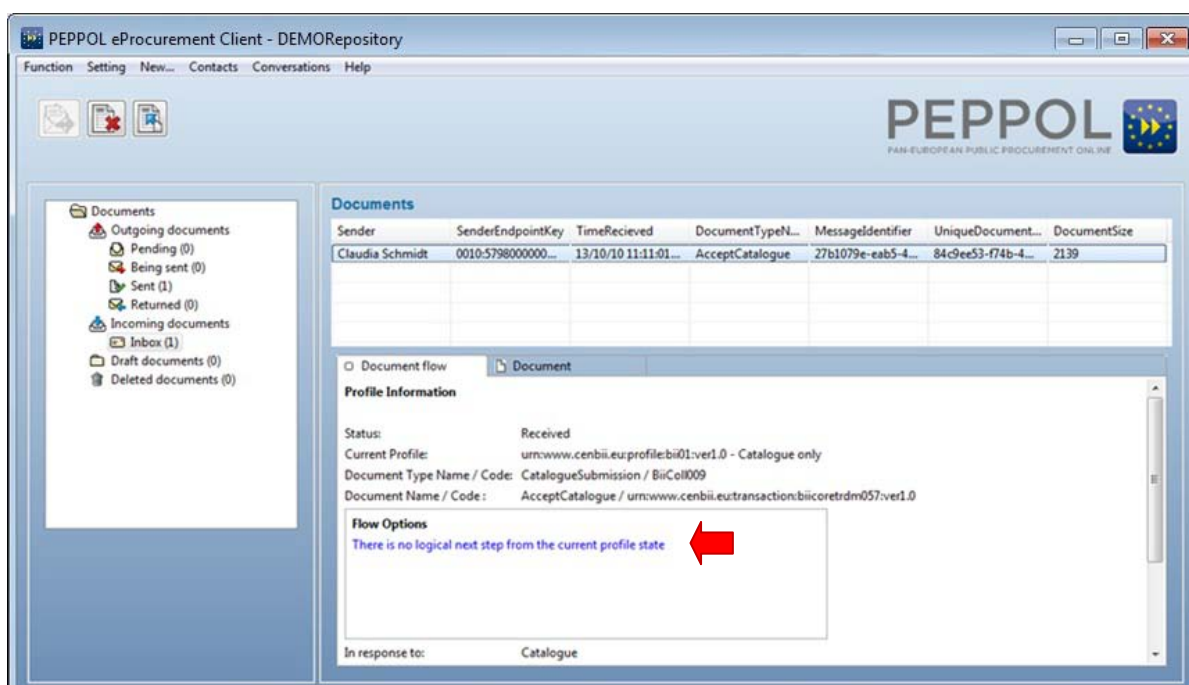


Figure 57: The EcOp received the document in Inbox Folder

The **EcOp** can now show the detail of this response selecting the Document Tab.

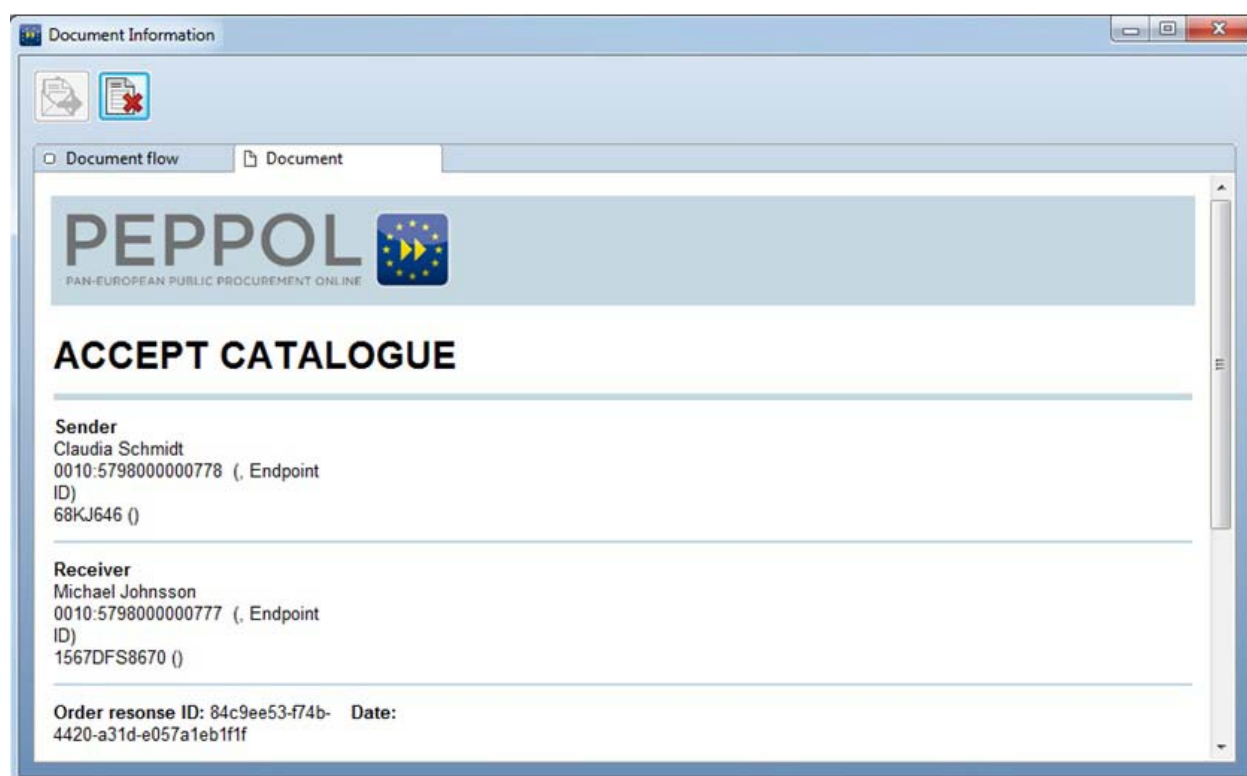


Figure 58: The Client allows to display the document in a HTML form

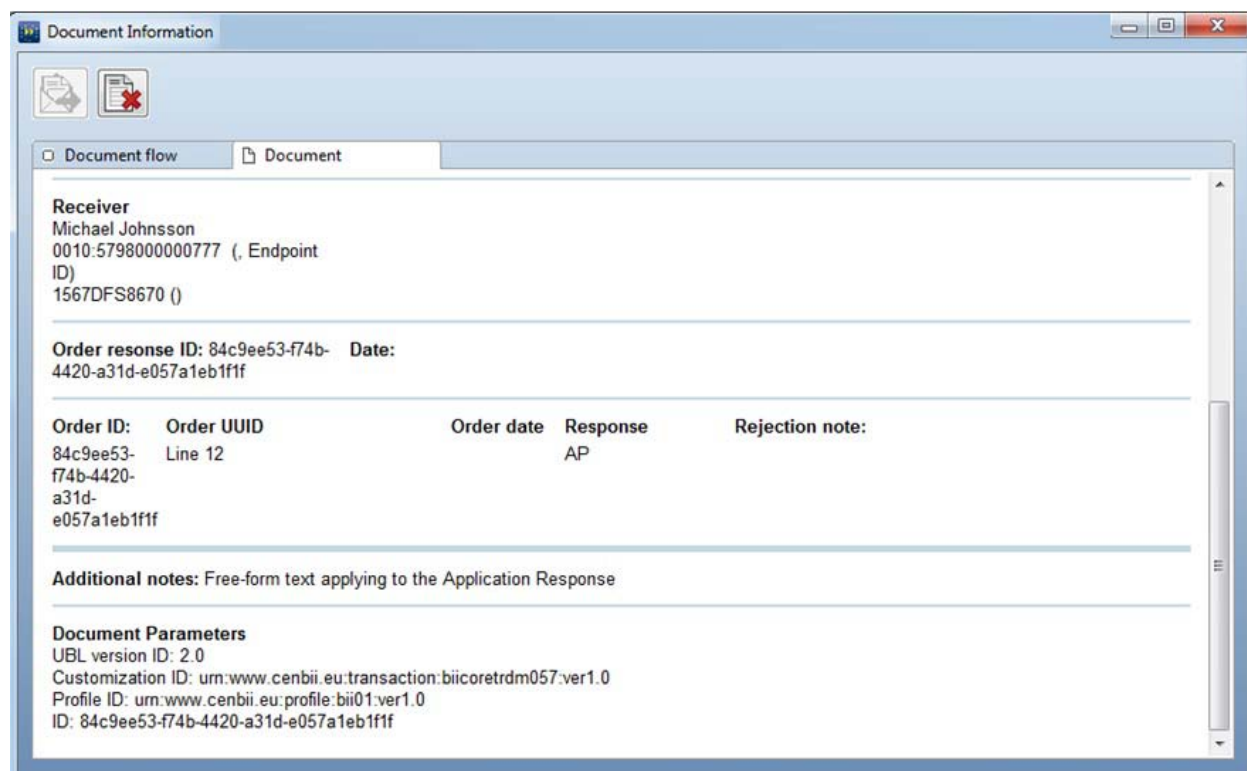


Figure 59: The Client allows to display the document in a HTML form