Guideline

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PreAward - eCat

PEPPOL eCatalogue Demo Client User Guide

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1.0.1	20.04.2012	Leonardo Bertini	Consip	Consolidation and integration with installation guide

Statement of originality

This deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

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PEPPOL eCatalogue Demo Client User Guide

1 Introduction

PEPPOL (Pan European Public Procurement On Line) is a pilot project under the European Commission's CIP (Competitiveness and Innovation Programme) initiative.
PEPPOL's vision is to enable any company and in particular small and medium-sized enterprises (SMEs) to communicate electronically with any EU government institution institution for the entire procurement process, increasing efficiencies and reducing costs.

E-procurement processes may be manual or automated, or combinations of the two. For example:
a) Tendering (pre-award) is today typically manual processes:
- Electronic documents are meant to be read by humans (e.g. PDF).
- Documents are submitted and read following manual work processes.
- More automated processes for e-tendering are envisaged but not within the timeframe of PEPPOL

b) Post-award (ordering, invoicing) may be automated or manual
- In the manual case, electronic documents are sent by manual processes, addressed to an actor where a person will read the documents (e.g. a PDF invoice).
- In a fully automated case, the originating system will generate a structured document (typically XML) and ship this off to the receiver, where the document will be handled automatically by the receiver's system. Manual intervention may be kept at a minimum.

Peppol had provided a tool, the DemoClient, to manage eCatalogues in the framework of cross-border public procurement procedures, both as part of a bid submitted by competing tenderers (pre-award), and as a basis for issuing orders to economic operators (post-award).

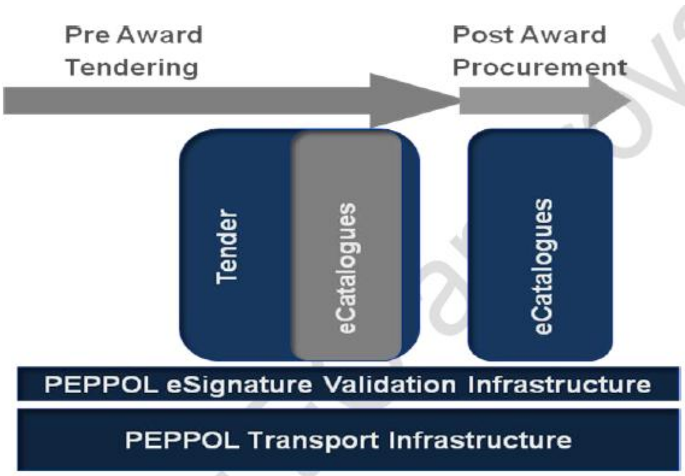


Figure 1 : eCatalogue Scope

The above Figure indicates that the preaward electronic catalogues is a part of a Tender within the Tendering process and can set the foundation for the postaward eCatalogue.
The (optional) underlying eSignature validation supports digital signing of eCatalogues to ensure eSignatures work end-to-end between the participants.
The (optional) PEPPOL transport infrastructure ensures secure and reliable communication of eCatalogues.

1.1 Purpose

This document guides the user through easy steps about how to run Pre-Award phases in the PEPPOL eCatalogue Management Tool called Demo Client. In a nutshell, it contains simple lessons about how a Public Administration (Contracting Authotities) can set up a CallForTender document, or Economic Operator can prepare a Tender document (to renspondo to a Call for Tender)
The Demo Client could be used as well to manage Post-Award Catalogue process.
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).

DEMO CLient 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 Demo Client on:
https://joinup.ec.europa.eu/svn/peppol/PEPPOL_EIA/1-ICT_Architecture/1-ICT-PreAward_eProcurement/16-ICT-Implementations/

2 How to Install the Demo Client

2.1 Application requirements

DemoClient supports following operating Systems:

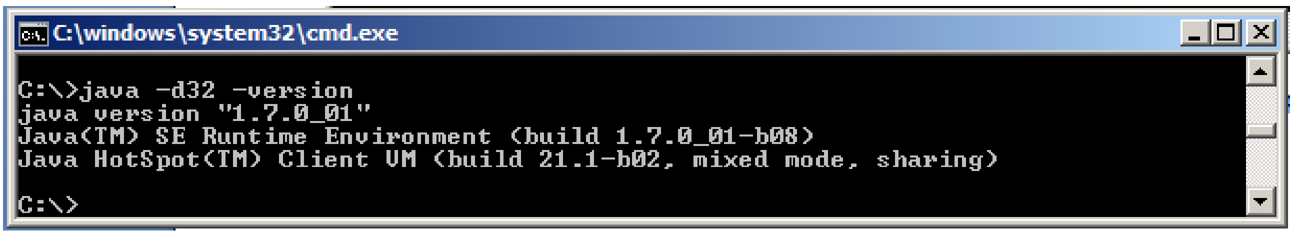
- Windows 7 - Service Pack 1
- Windows XP – Service Pack 2

2.1.1 Java Version

In order to run the demo client you should have installed Java 32 bit.

To verify if the java version running on your computer is 32 bit, from a DOS prompt type:
java -d32 -version

If you are running a java 32 bit, then the version is displayed in the window, as in the following picture:



If an error is displayed, you should install the latest java version for Windows x86 from Oracle site:
http://www.oracle.com/technetwork/java/javase/downloads/jdk-7u1-download-513651.html

2.1.2 Instructions for Windows 7 users

If you are a Windows7 user, and you have both java 32 bit than java 64 bit installed on your computer, you should set the system variables in Windows to show the JDK 32 bit version, so that JAVA_HOME variable points to the correct JDK.
To change the system environment variables, follow the below steps.

1. From the desktop, right-click **My Computer** and click **Properties**.
2. In the System Properties window, click on the **Advanced** tab.

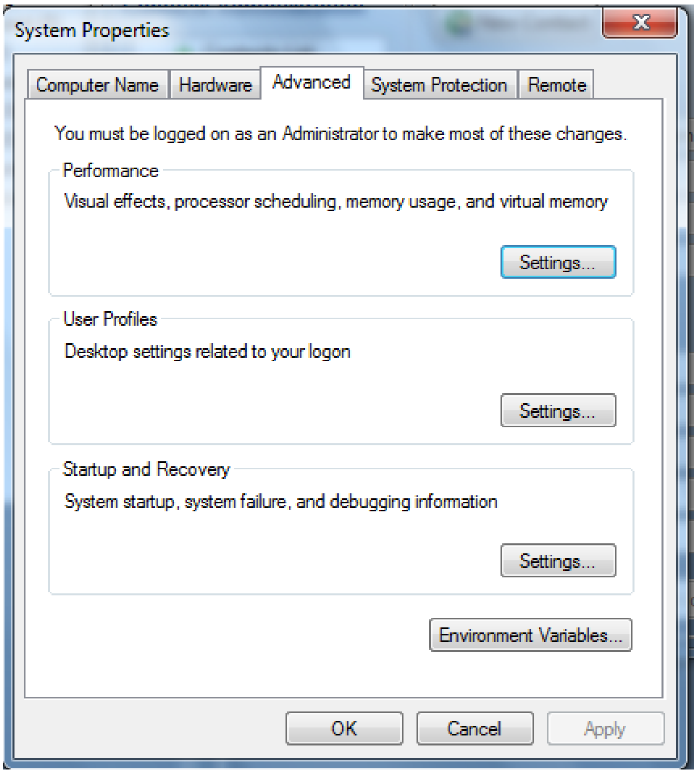


Figure 1: Opening Environment Variables interface

3. In the Advanced section, click the **Environment Variables** button.

Finally, in the Environment Variables window (as shown below), highlight the **Path** variable in the Systems Variable section and click the **Edit** button. Add or modify the path lines with the paths you wish the computer to access. Each different directory is separated with a semicolon as shown below.

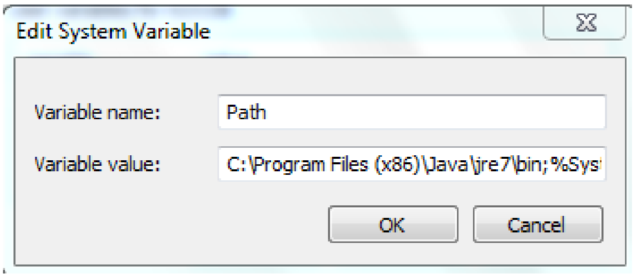


Figure 2 : Modifying environment variables

Modify the path and click on ok.

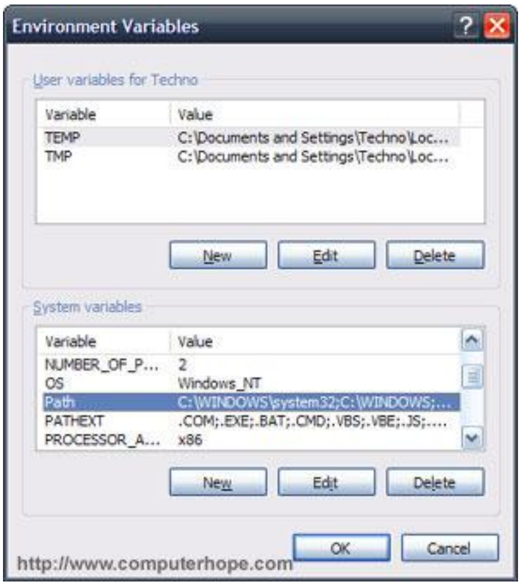


Figure 3: Opening Environment Variables interface

After modifying the path verify the correct use of the new path:

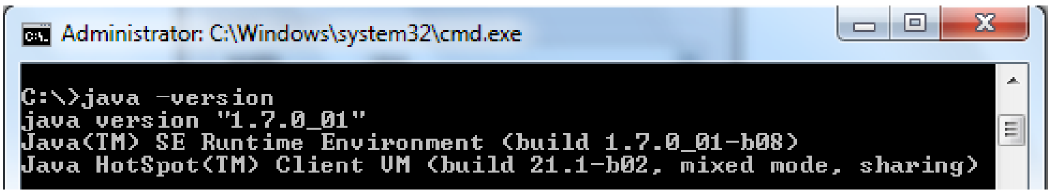


Figure 4: Testing java version

2.2 Installing DemoClient

Before installing the DemoClient application:

1. Verify that the operating system and java are installed at the correct service levels (see Application Requirements paragraph).
2. Verify that you do not have a previous DemoClient environment on the workstation. If you have it, remove the folder where you unzipped the previous version of DemoClient.

Installation files are freely available from web servers located at following url:

ICT-PreAward-eCat-Management_Tool_SW_Library_204_Italian_Pilot.zip

Download the files and save them in your computer. When file downloading is completed, start the installation as follows:

1. Place DemoClient installation file (es. *"ICT-PreAward-eCat-anagement_Tool_SW_Library_202.zip")* in a temporary directory.
2. Unzip the DemoClient installation file in the folder where you want to install the DemoClient application (es. demo_client).

To verify your installation completed successfully:

1. launch the "runDemoClient.bat" command file you find in [demo_client] folder to start the application. Following page will be displayed:

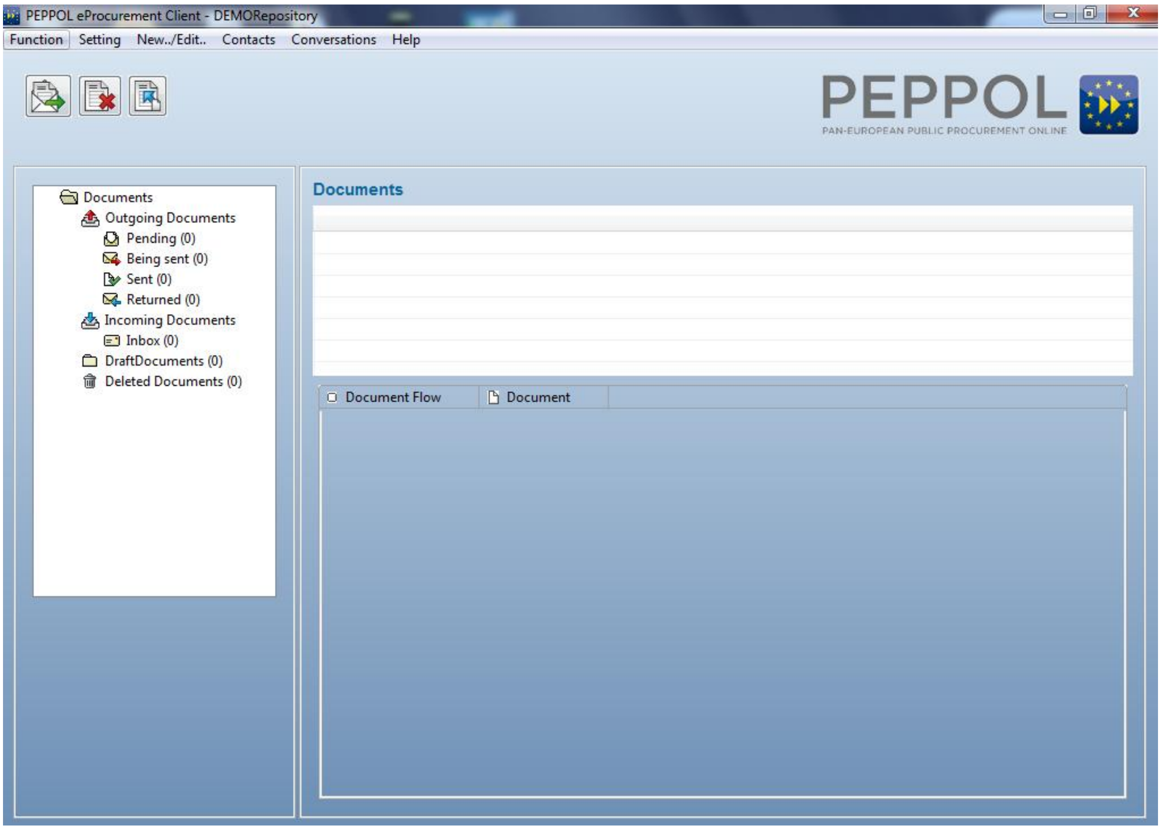


Figure 5: Demo client starting window

1. When the application starts, the application is installed correctly and you may proceed configuring the DemoClient as described in the following section.
2. If the application fails to start, capture the error messages in the DOS windows, paste it into an email and send it the following address: peppol@tesoro.it

2.3 **Getting started: setting up the DemoClient Application**

When the application starts, the following window is displayed:

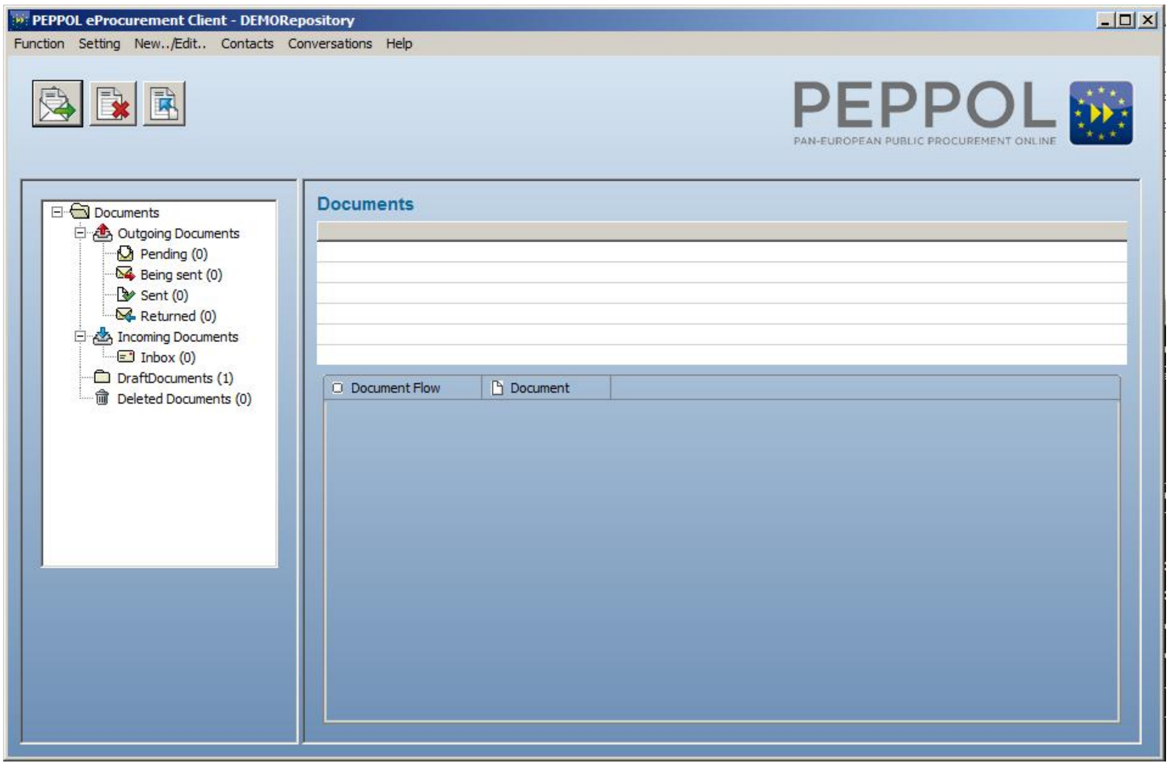


Figure 6: Demo client

2.4 **Select your language**

The client can be configured to change the language that you prefer. To select your language follow these steps:

1. Click “*Settings/Configuration*” in the menu bar.
2. The “*Configuration*” window will appear. Then click on the “*Language & Role*” tab.
3. Click the “*Update the Client*” button to restart the application.

To configure the application, follow these steps:

1. Click “*Settings/Configuration*” in the menu bar. The “*Configuration*” window appears:

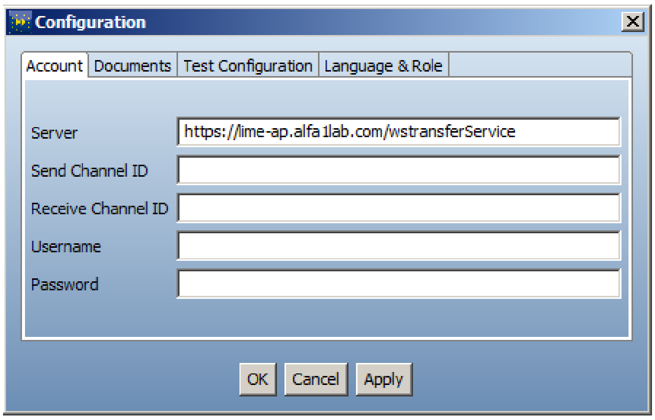


Figure 7: Demo client configuration window

To fill in the fields of the "Configuration" window, contact your Access Point provider. See section (4.3 Setting up an agreement with an Access Point Service Provider)

2. In the *Language & Role tab*, select:
   a. *EcOp - Economic Operator* as User Role;
   b. *en - English* as Language;

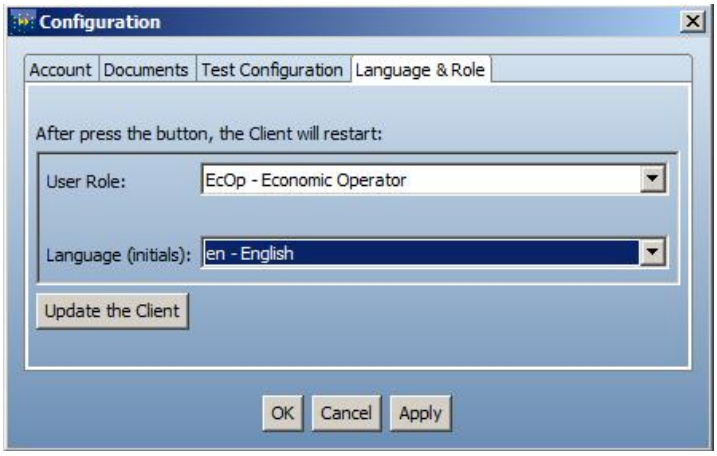


Figure 8: Demo client Configuration Window - Language & Role

   c. Press the *Update the Client* button to restart the application. You are now ready to use the DemoClient application.

2.5 Select a document folder and change repository.

The DemoClient application uses a disk folder structure to store documents, which you receive or create. You may drop XML invoices and orders documents directly into the drop folder, which will then be displayed in the “pending” folder of the client.

To change the root folder location on the disk:

1. Click “Settings/Configuration” in the menu bar.
2. The “Configuration” window will appear. Then click on the “Documents” tab.
3. Click the “Browser” button and select a folder on your machine.

To change the repository where all the demo client documents are stored, follow these steps:

1. Click “Settings/Configuration” in the menu bar.
2. When “Configuration” window shows up, click on the “Documents” tab.
3. Click the “Browser” button and select a folder on your machine.
4. Press “OK” button to save your settings.

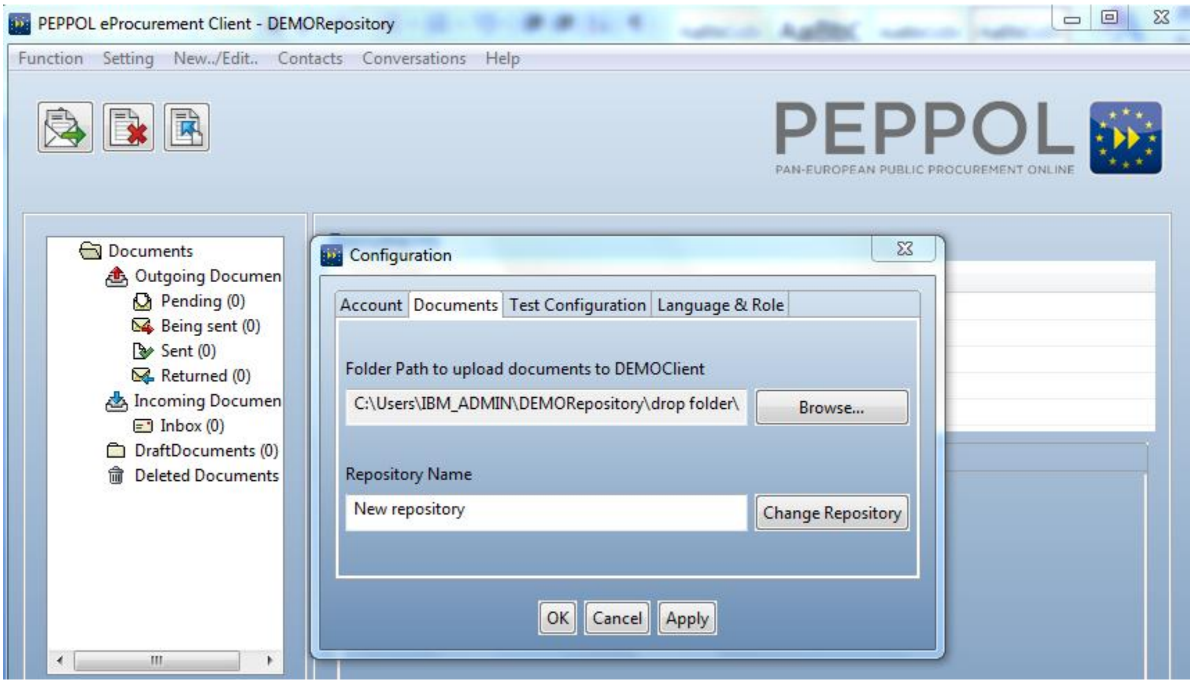


Figure 9: Configuring document repositories

2.6 Setting up an agreement with an Access Point Service Provider

To run a post-award scenario pilot with Demo Client it is necessary to be connected to an Access Point (for pre-award is optional). Look for the Access Points list on www.peppol.eu or request for your National AccessPoints to peppol@tesoro.it

The Access Point will give you the URL and ID’s to activate the transport connections for post-award eCatalogue, eOrder and eInvoice.

For the Pilots running until April 2012, Access Point of gruppo Tesi is available in Italy for free.
An agreement with gruppo Tesi should be taken. Send an email to *peppol@gruppotesi.com* and *roberto.cisternino@partners.gruppotesi.com*, you will receive a schema of the agreement to be filled in and returned to gruppo Tesi.

2.7 Set up an account with an access point

To send and receive documents, you must have an account with an Access Point service provider (and an Internet connection!). The client is pre-configured to an open example service provider.

When the client communicates with the service provider, it needs a business identifier to identify itself to the service provider. It will also need this business identifier to announce to the rest of the world that it is ready to receive documents.

Configure the client as follows:

1. Click in “S*ettings/Configuration*” in the menu bar.
2. The “*Configuration*” window will appear.
3. Click in “*Account*” panel.
4. You may change the following settings:
   a. **Server:** Type the URL of the LIME Access Point of your service provider, for example: “http://lime-ap.alfa1lab.com/wstransferService”. You need to also receive a business identifier from your service provider.
   b. The fields “*Send channel ID*”, “*Receive channel ID*” should all be set to the same value – namely the value you have received from your Access Point service provider.
   c. The field Username and Password are to be filled with the values received from your Access Point service provider.
5. Press “*OK*” button to save your settings.

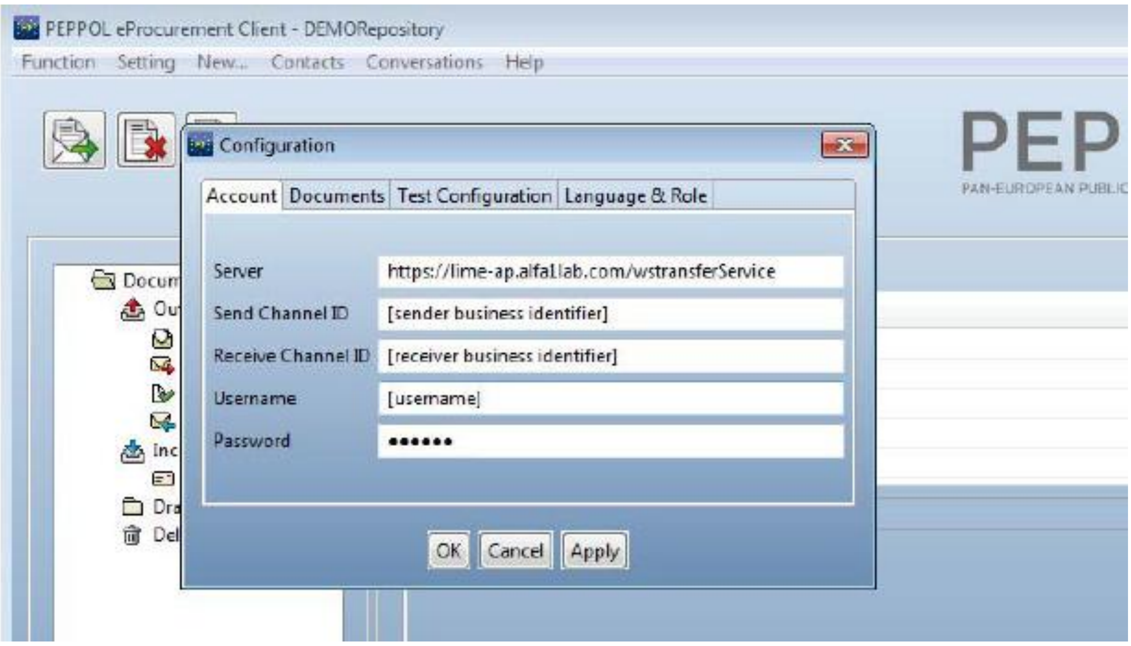


Figure 10: Setup account information

2.8 Test your transport connection

To check the connection between your Demo client installed and the transport library connection with your AP follow these steps.

1. Click "*Settings/Configuration*" in the menu bar.
2. The "*Configuration*" window will appear.
3. Click on the "*Test Configuration*" tab.
4. Click the "*Test Client Configuration*" button to see:
   a. The server connection
   b. The server provider
   c. Authentication status
5. Press "OK" button to finish.

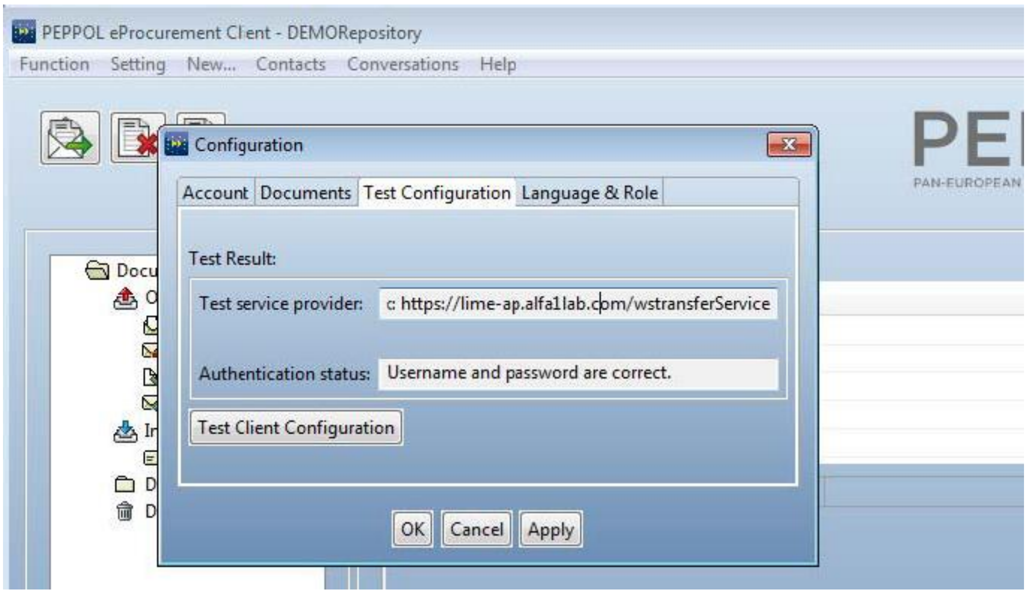


Figure 11: Testing account configuration

2.9 Create, delete or edit your contacts

To create, delete or edit your contact select: *Contacts/Contacts Administration*.

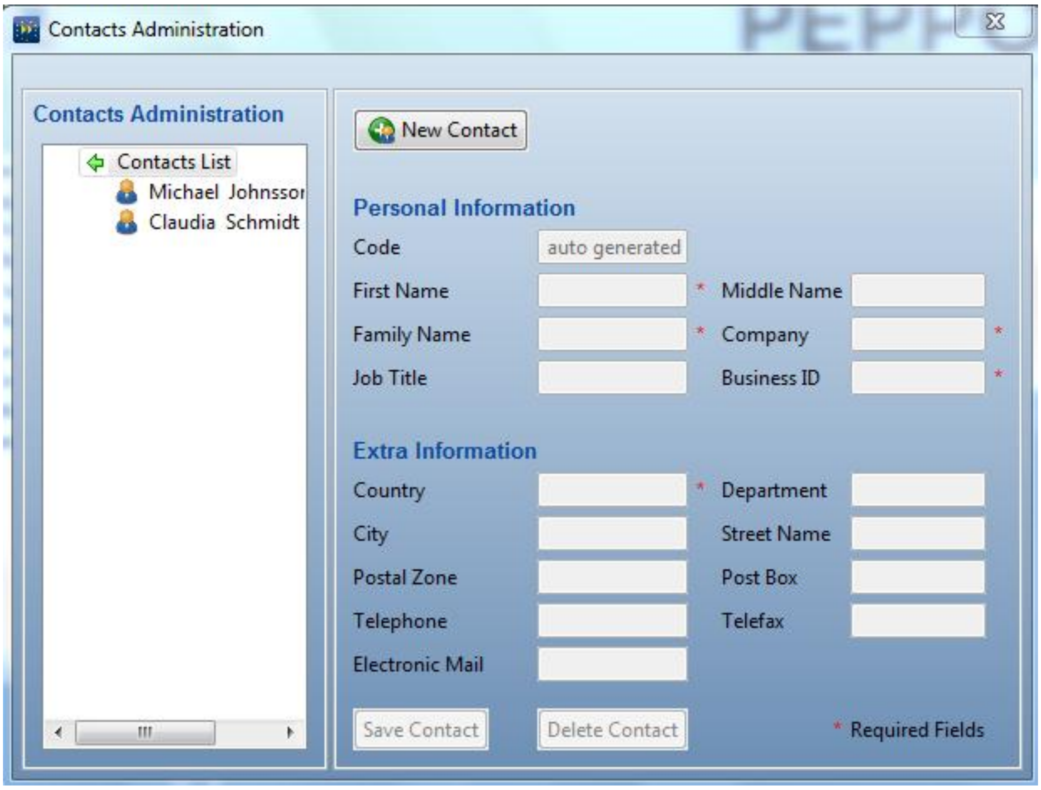


Figure 12: Editing contacts

Fill in the fields, that select "*Save Contact*".

2.10 **Manage procurement conversation**

In order to interact with the application, the window “Procurement conversation” will generate a history with current or past conversations between the business actors.

To check or delete some conversation click on “*Conversations/Procurements*”

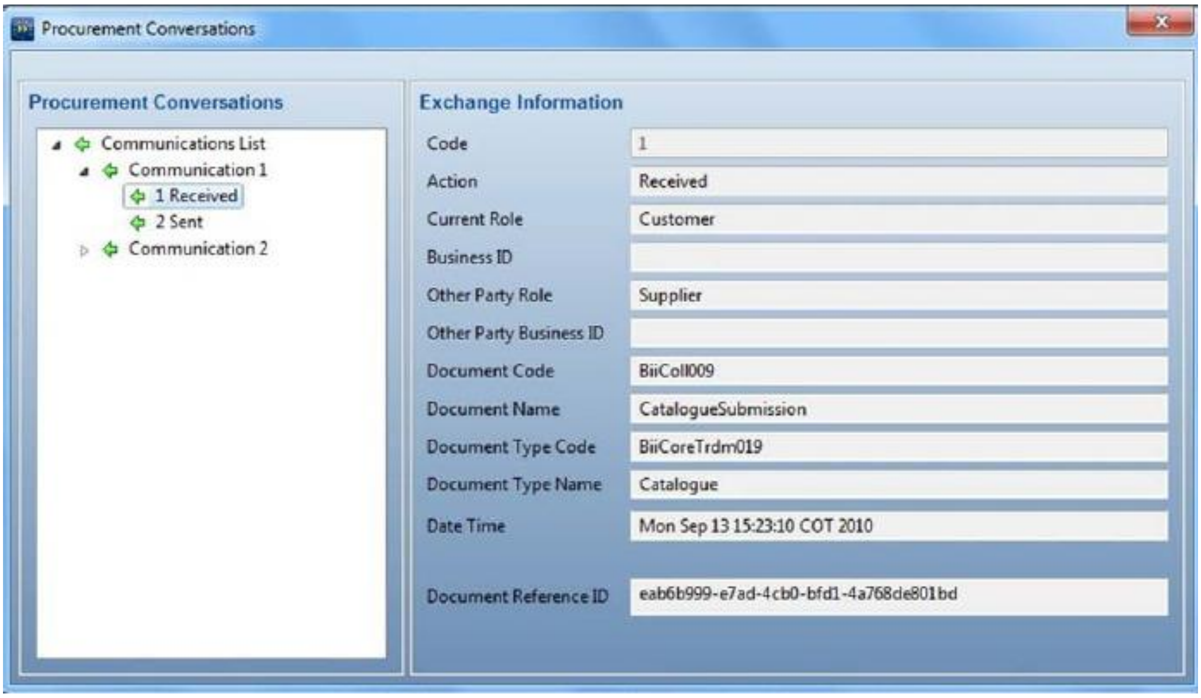


Figure 13: Communication log

2.11 Help

To see the version of the Demo client click on "*Help/About…*"
The "*About the Peppol Demonstrator*" window appears. This window contains two links: the first one links to the Peppol web page, the other one redirects you to the Sub Version code repository where you can download the source code of the Demo Client application.

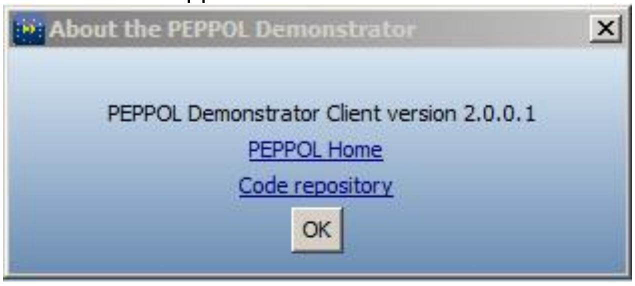


Figure 14: About window

3 Pre - Award Phase

3.1 Contracting Authority (Ca) functions

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

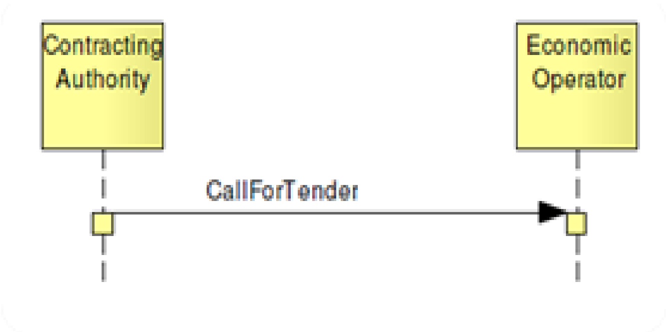


Figure 1: Graphic provided from CenBii

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

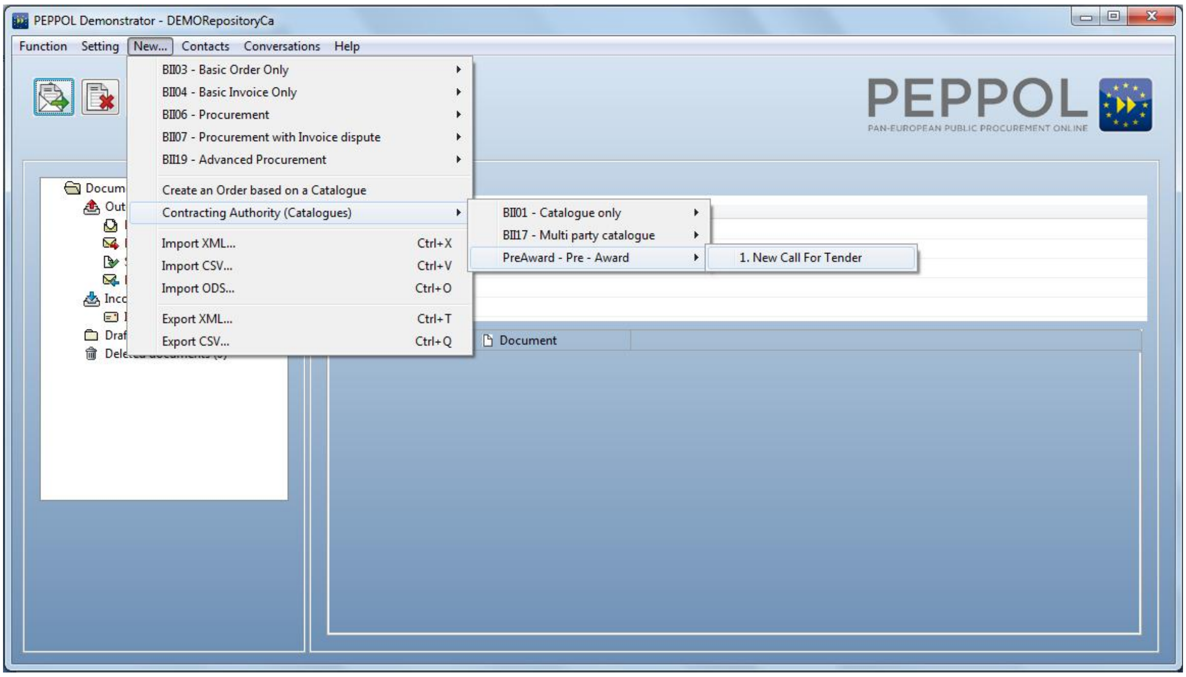


Figure 2: Selectng the New CallForTender option

Fill relevant information in the Details and Customer Party tabs.
Note that mandatory fields are marked with *.

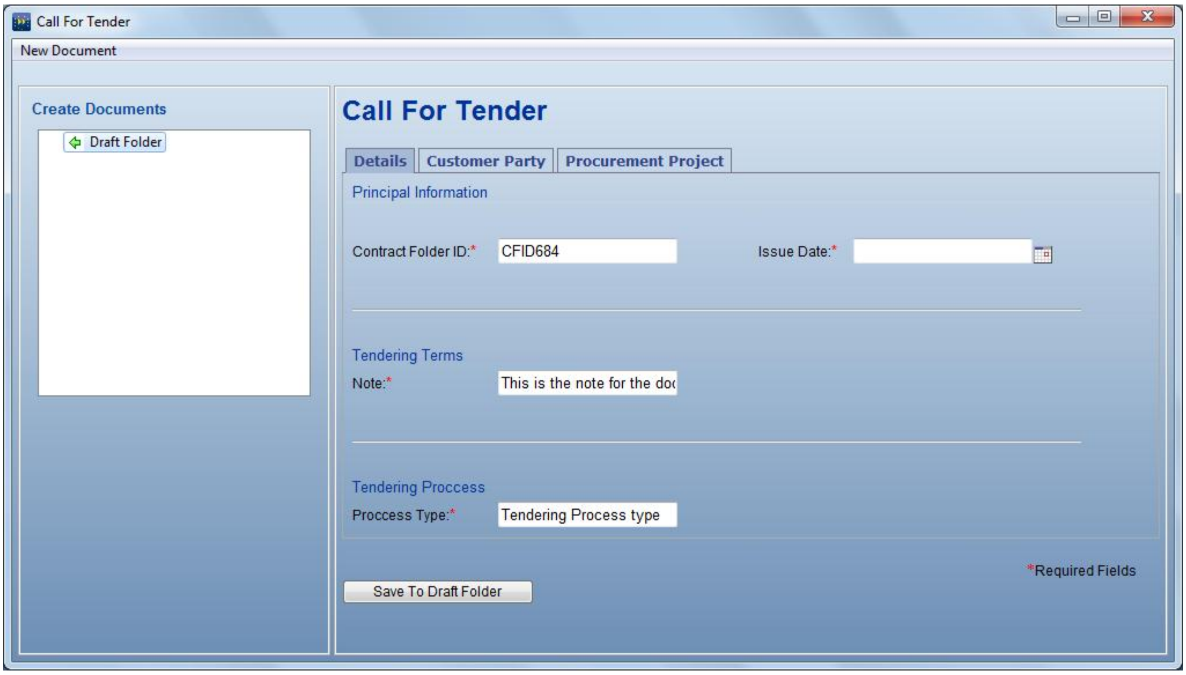


Figure 3: Detail tab form

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).

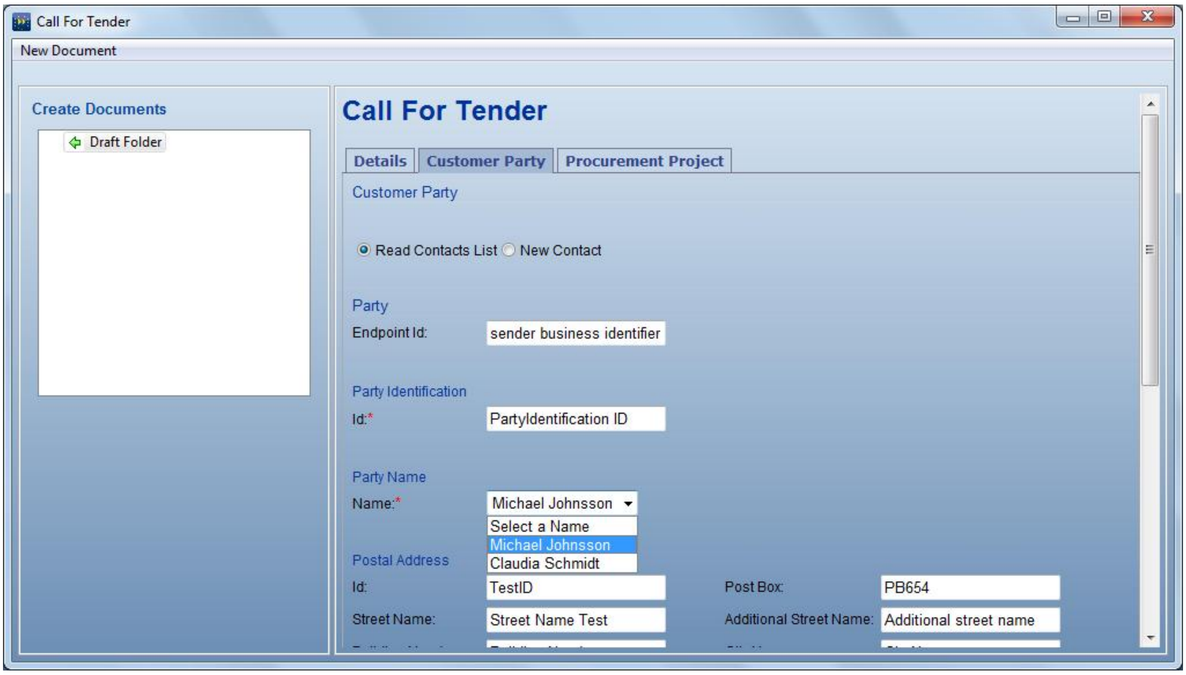


Figure 4: Customer Party tab form

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.

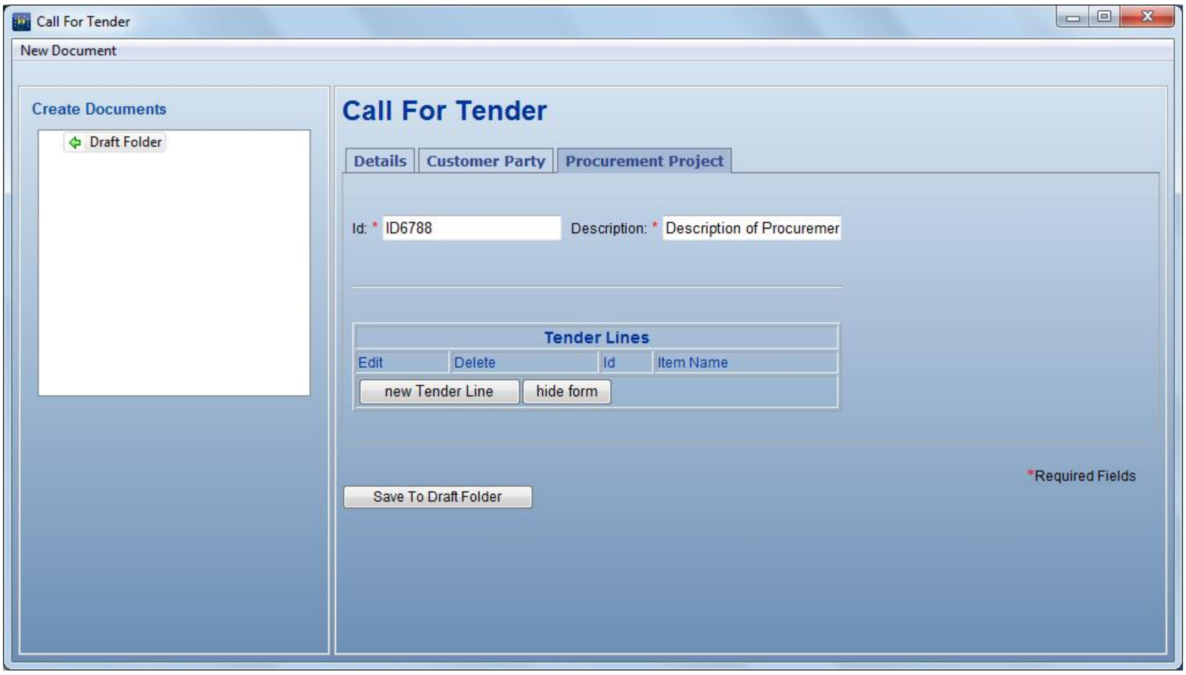


Figure 5: Procurement Project tab form

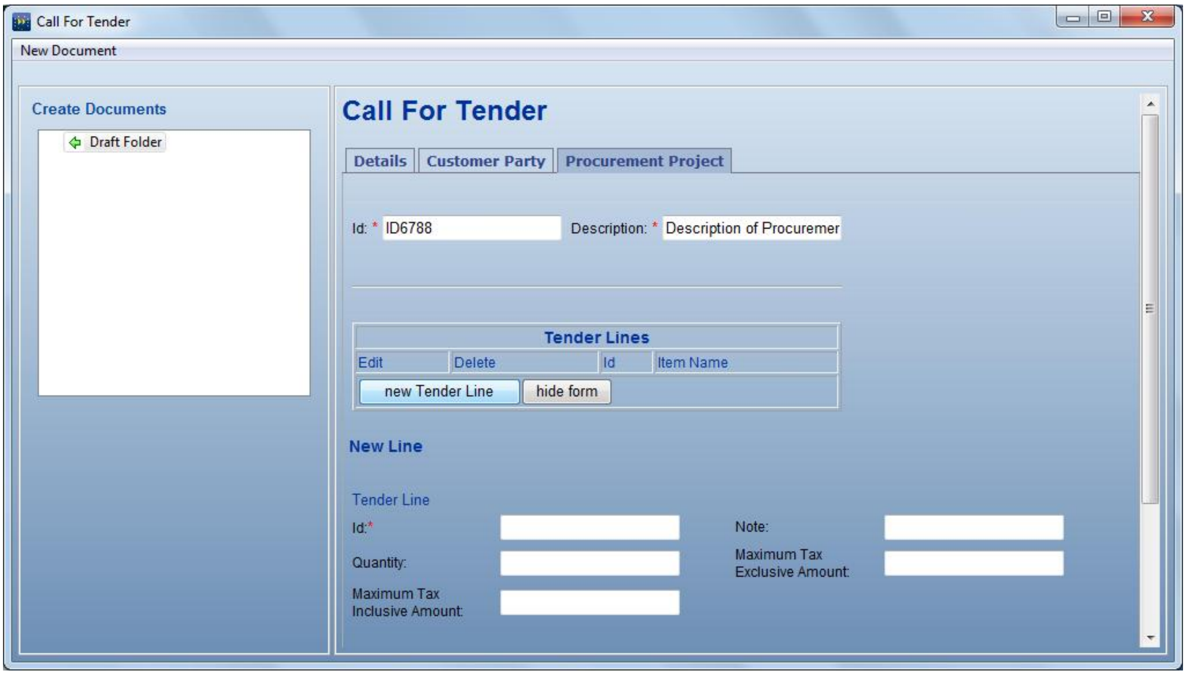


Figure 6: Pressing the New Request for Tender Line button

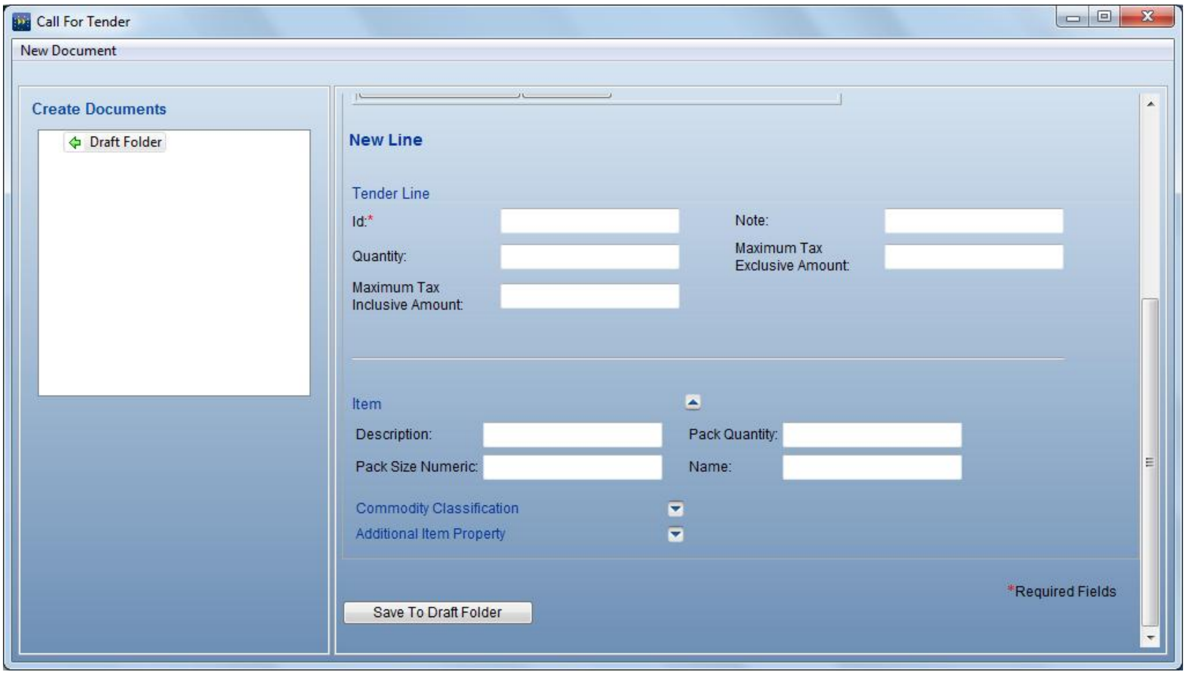


Figure 7: Request for Tender Line form

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 .

During the PEPPOL project CA managed the Call for tender eCatalogue design phase using as well some buttons with the PEPPOL Property Server PPS functionalities. The PPS allow to integrate into the catalogue property standardized definitions taken from an on line data base.

The Ca could click on the CPV button to go on the EU web site and download the CVP codes, and after click on the PPS button to go on the PPS on line Data Base (in cooperation with eClass).

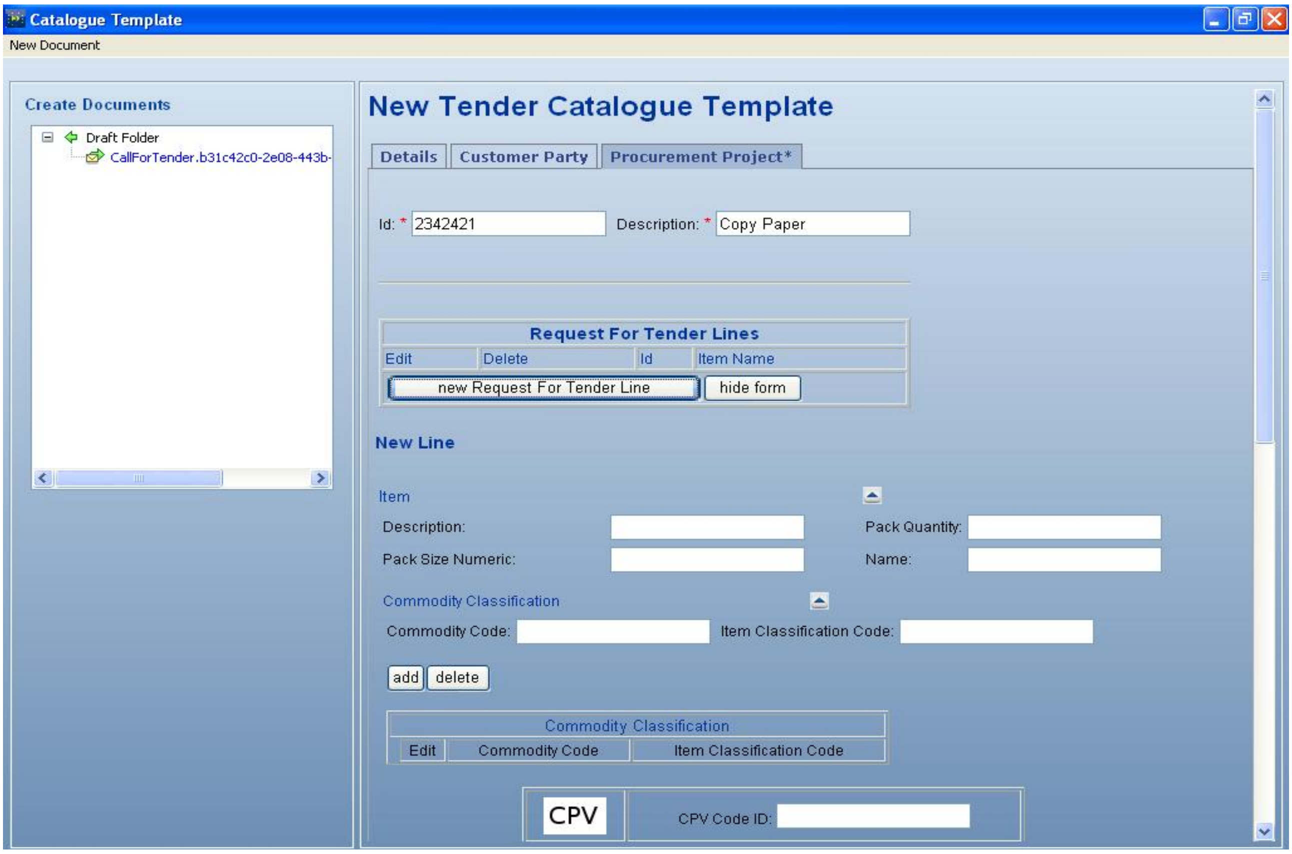


Figure – How to create a new product

From the PPS data base (see user manual How to use PPS) the CA could download directly into the Demo Client the property definitions.

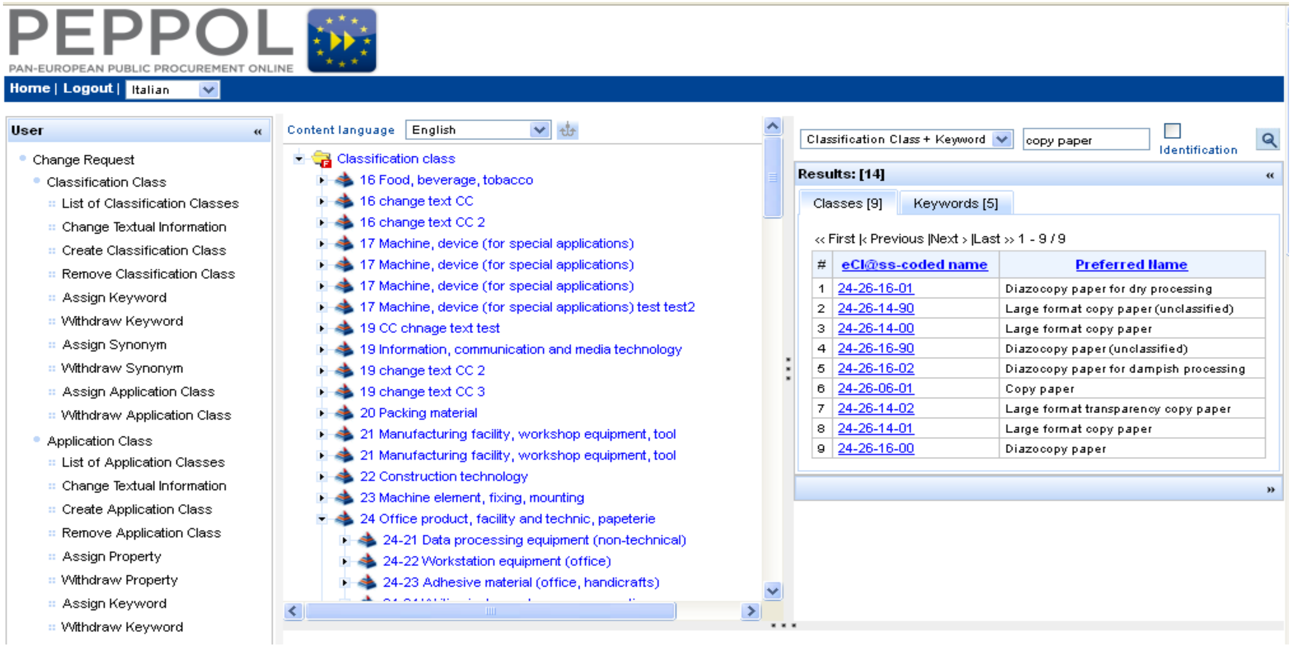


Figure – the PPS

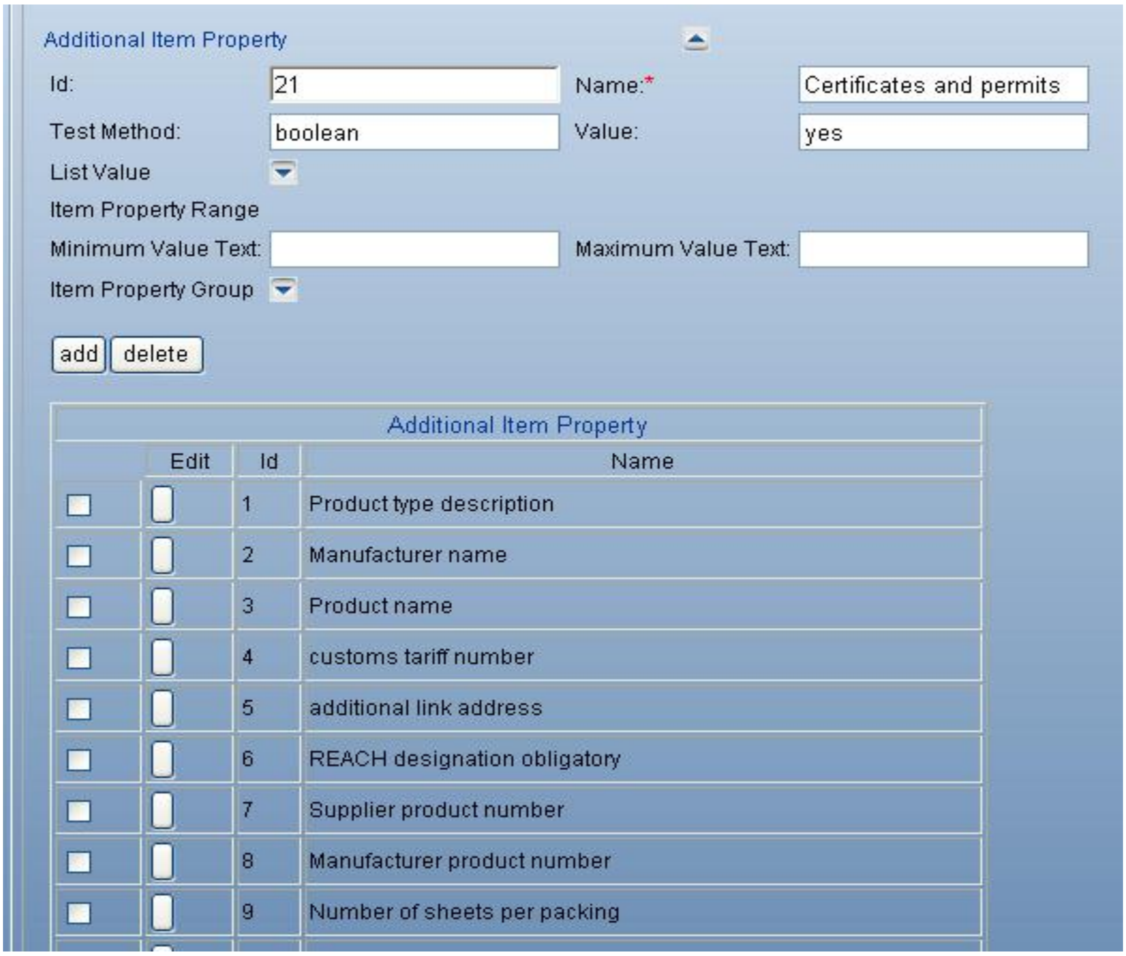


Figure - The CA find into the Demo Client standardize values from PPS

List Value

	Edit	List Value
		DIN A0 = 84.1 cm x 118.9 cm
		DIN A1 = 59.4 cm x 84.1 cm
		DIN A2 = 42.0 cm x 59.4 cm
		DIN A3 = 29.7 cm x 42.0 cm
		DIN A4 = 21.0 cm x 29.7 cm
		DIN A5 = 14.8 cm x 21.0 cm
		DIN A6 = 10.5 cm x 14.8 cm
		DIN 2A0 = 118.9 cm x 168.2 cm
		DIN 4A0 = 168.2 cm x 237.8 cm
		DIN A7 = 7.4 cm x 10.5 cm
		DIN A8 = 5.2 cm x 7.4 cm
		DIN A9 = 3.7 cm x 5.2 cm

Figure – per each item property (eg paper size) the CA could download into the Demo Client the values list

After the creation of the Call for Tender the CA could verify if the catalogue is well designed, with the validation function.

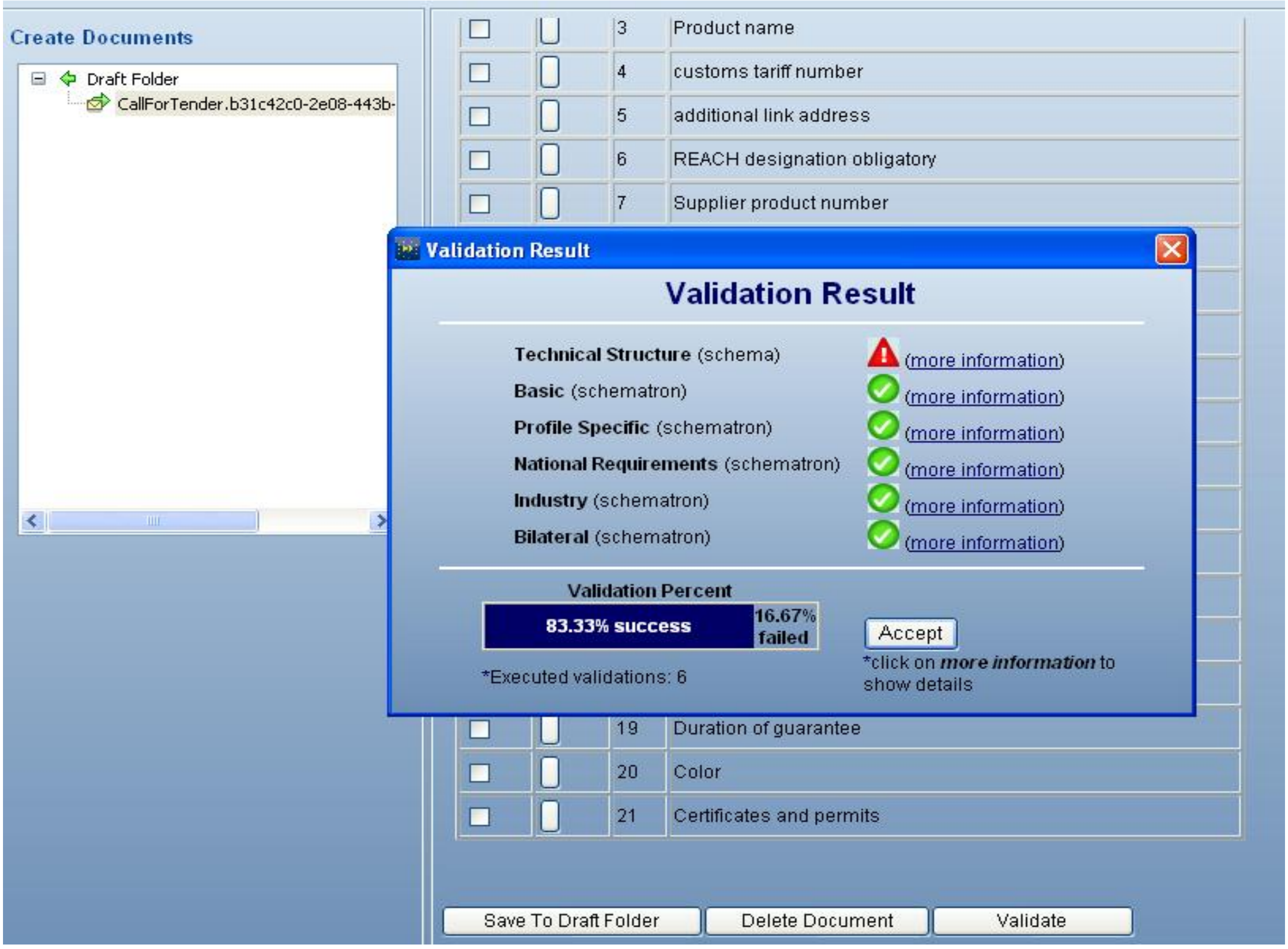


Figure – The CA Validate the Call for Tender

The CA save the document Call for Tender.

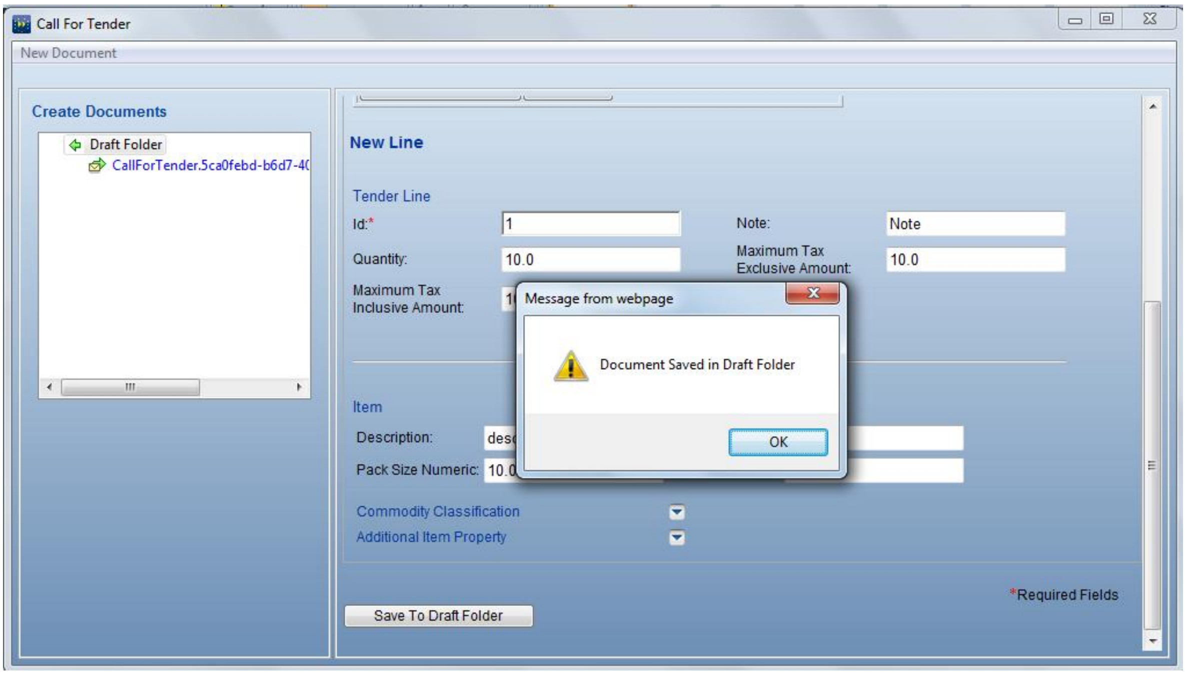


Figure 8: Saving in Draft Folder

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

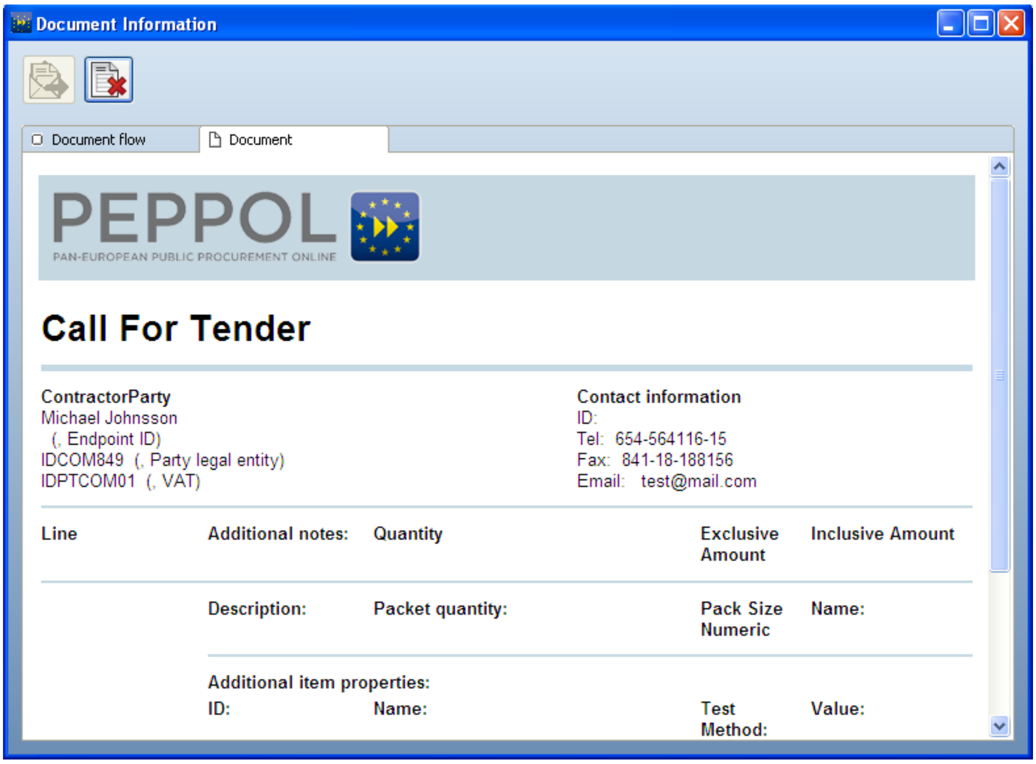


Figure 9: Displaying the document in the main interface

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

Now the Ca can export the CallForTender document, publish it on some eProcurement website, and the EcOp can import it.

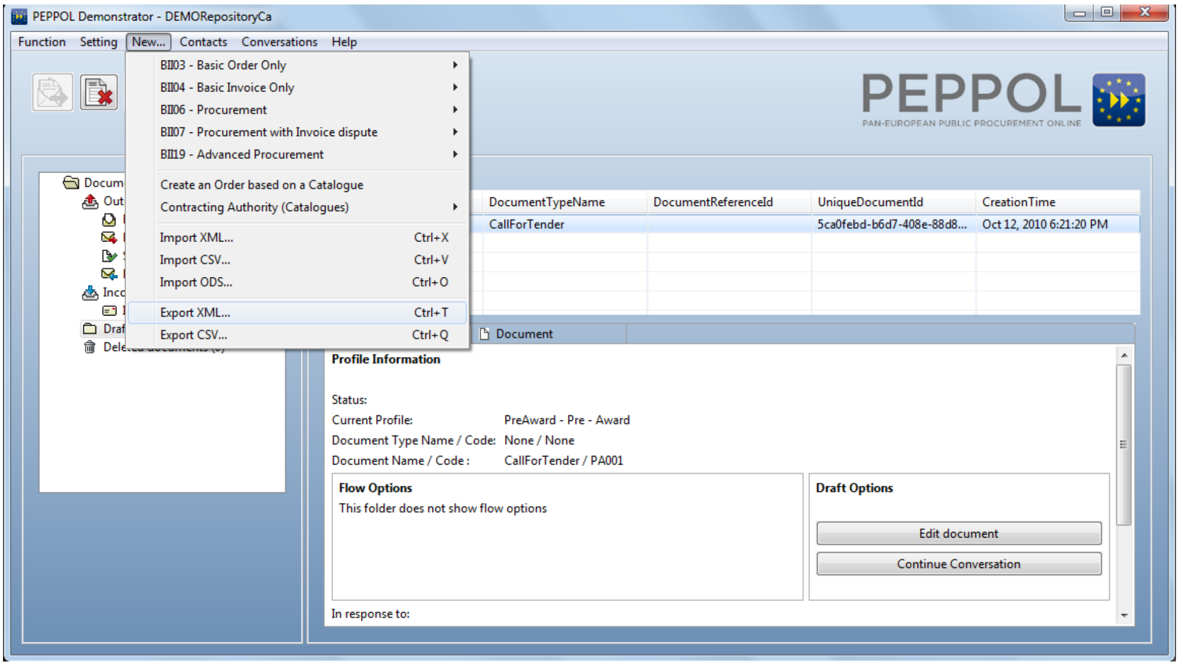


Figure 10: Export option

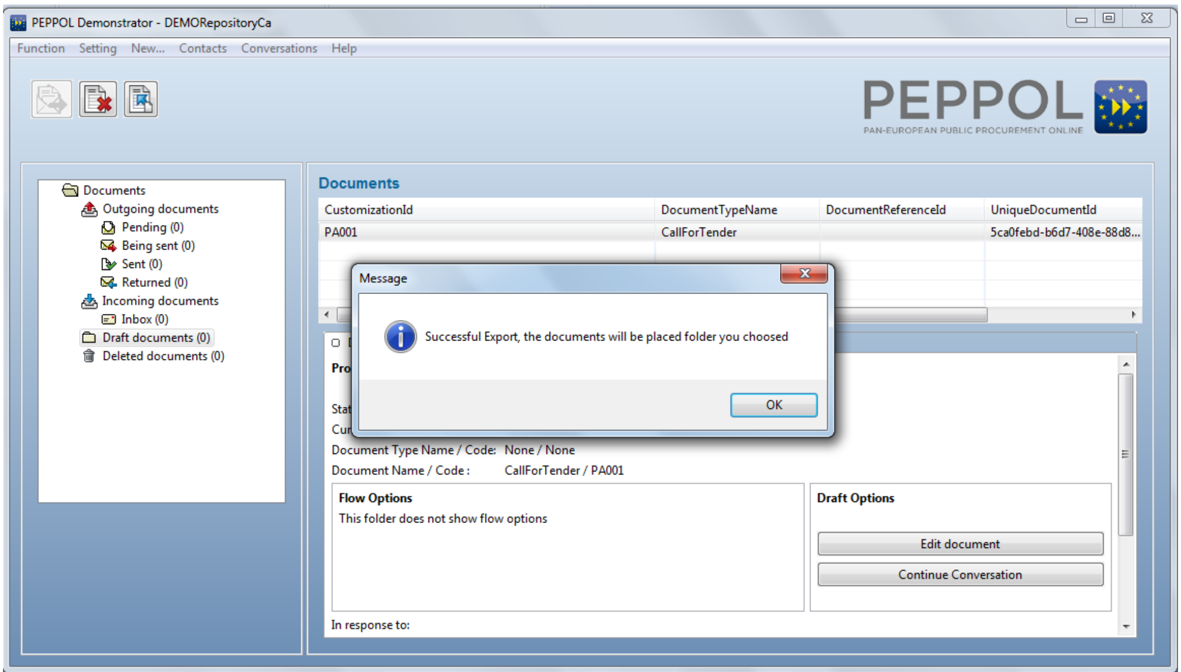


Figure 12: Message of the Export function

3.2 Economic Operator (EcOp) functions

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

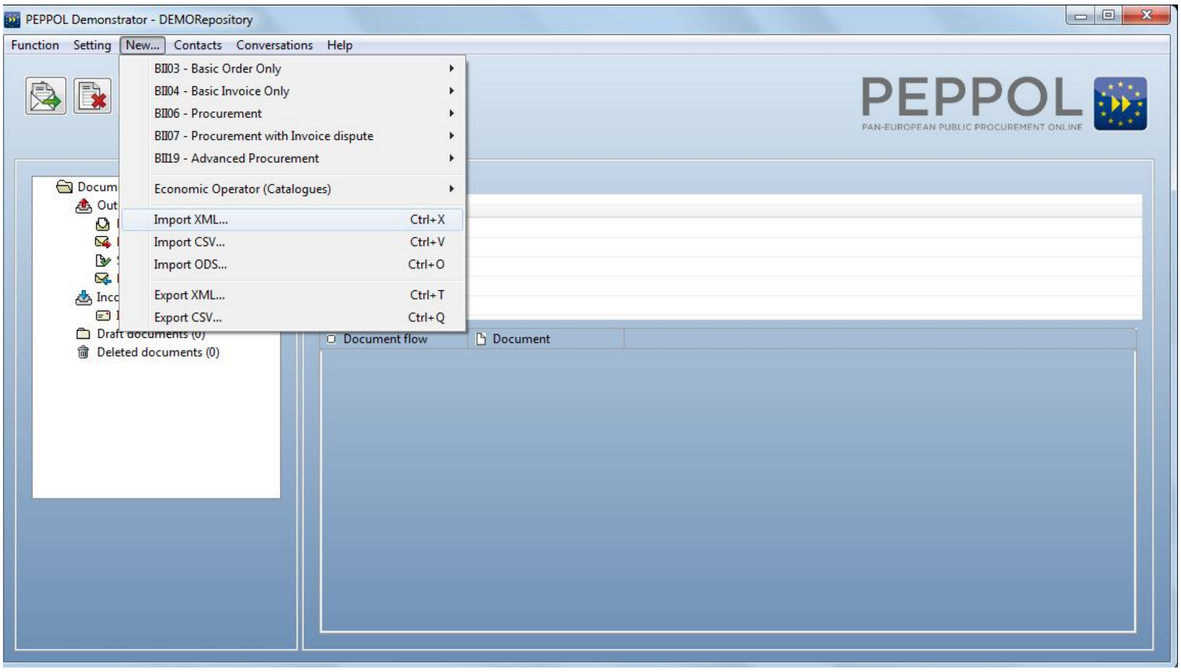


Figure 13: Import option

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

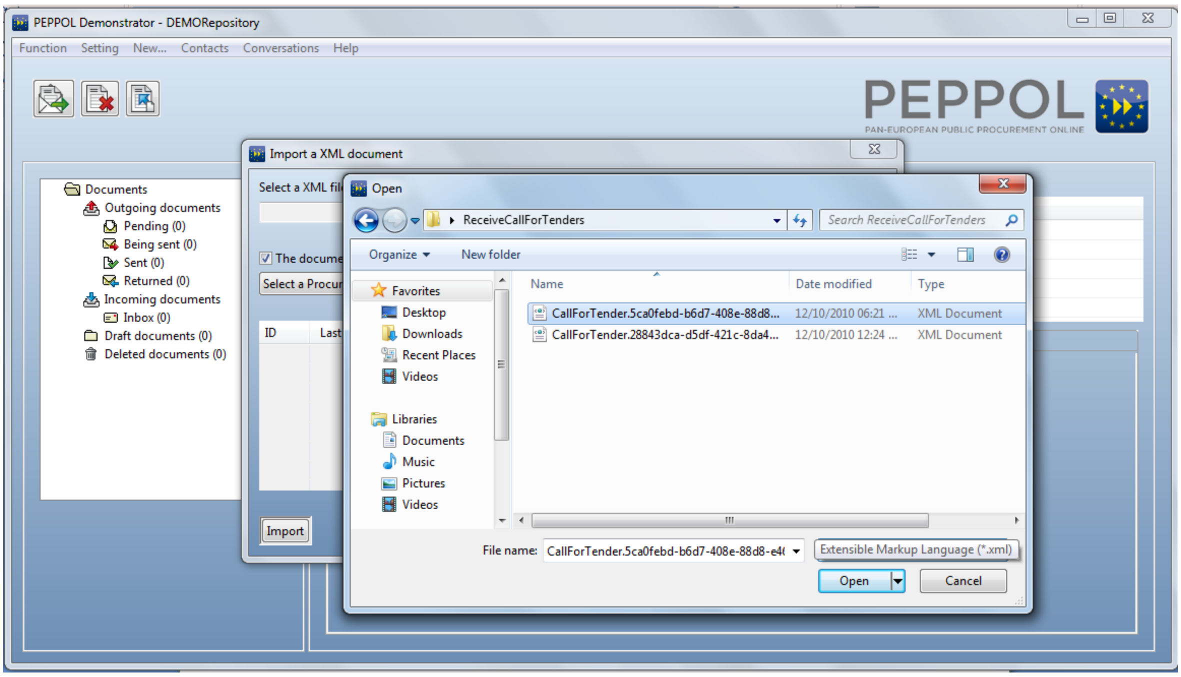


Figure 14: Import browsing

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

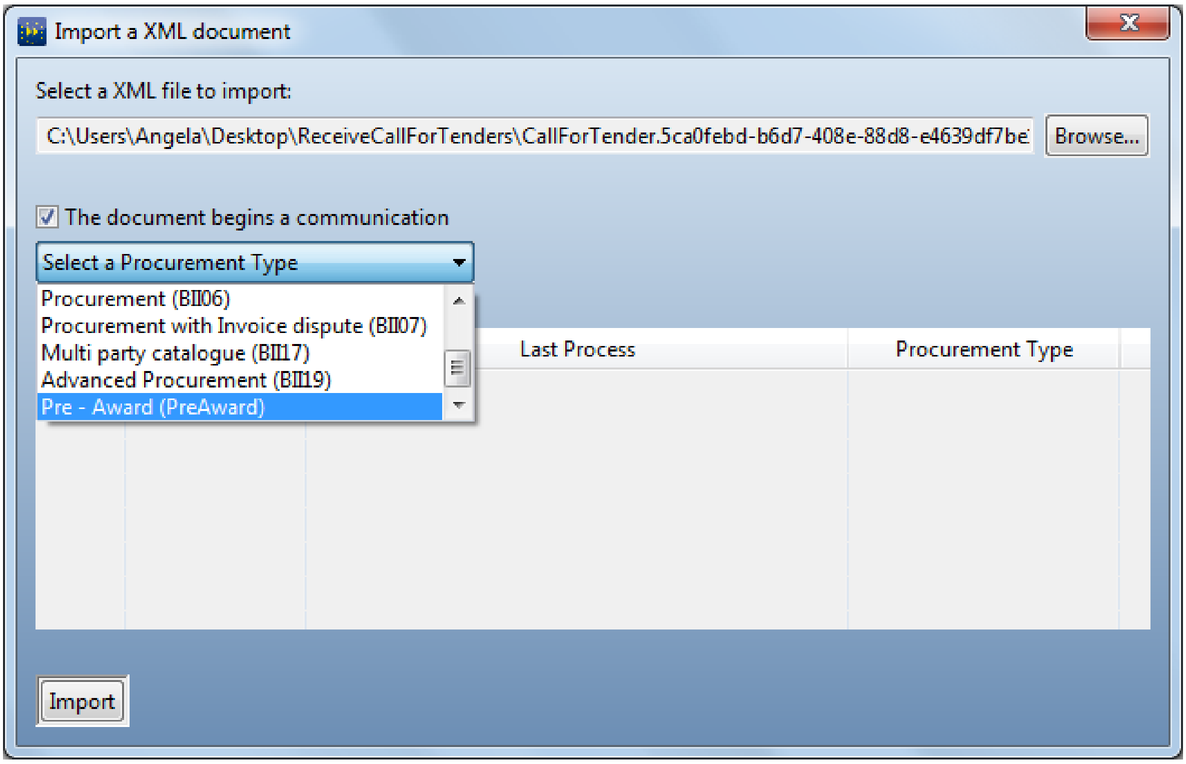


Figure 15: Selecting the correct procurement of the imported document

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

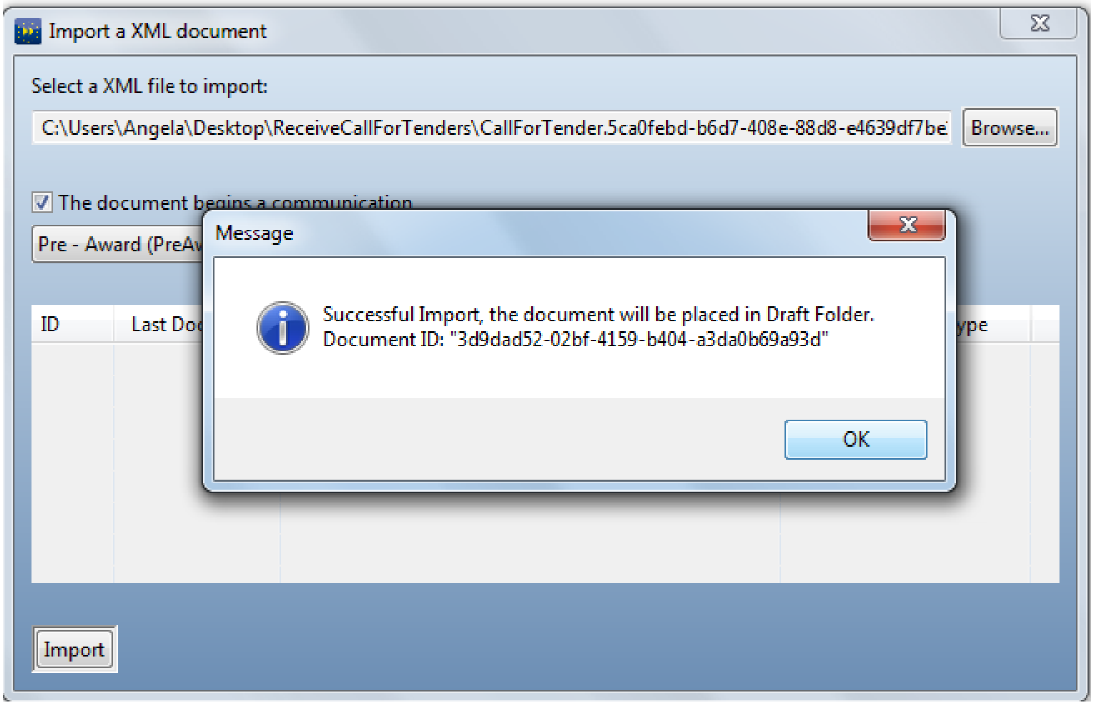


Figure 16: Message of the Importing function

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

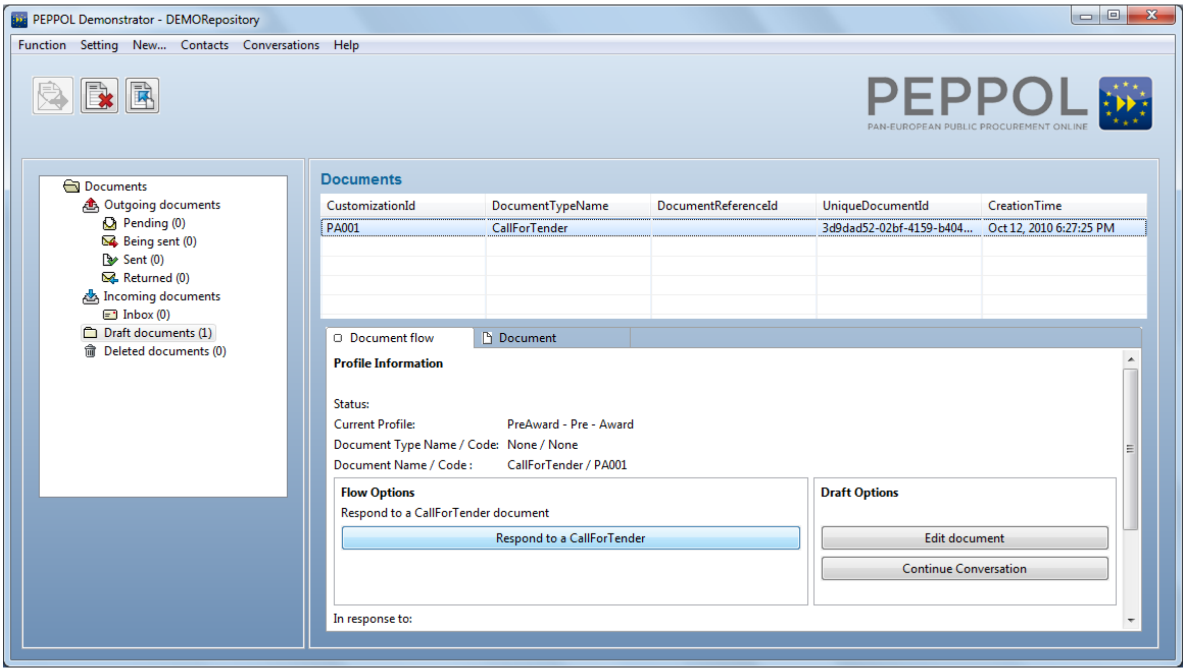


Figure 17: The Client shows the document in the Draft Folder

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.

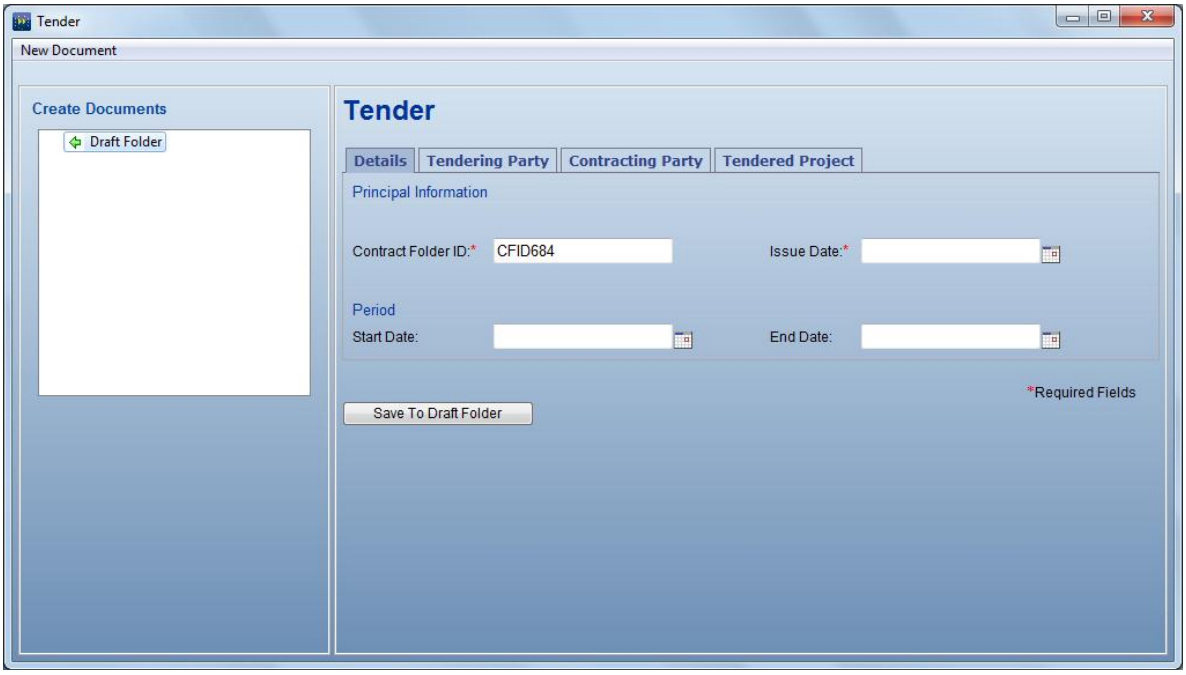


Figure 18: Detail tab form

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

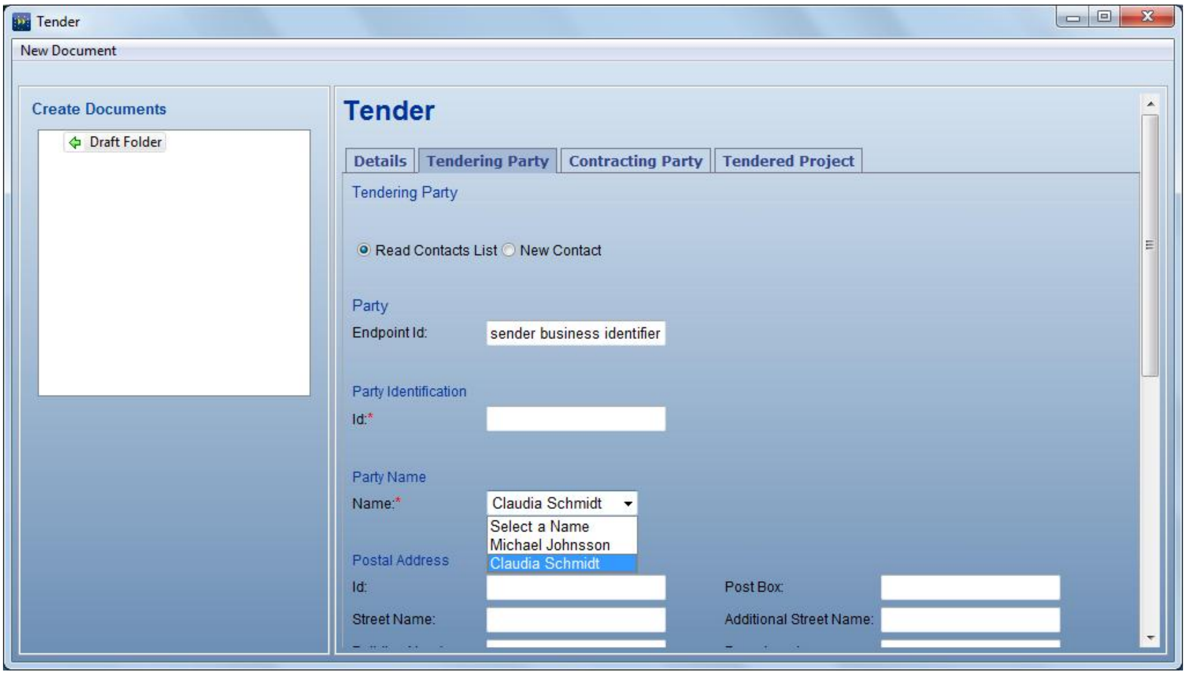


Figure 19: Tendering Party tab form

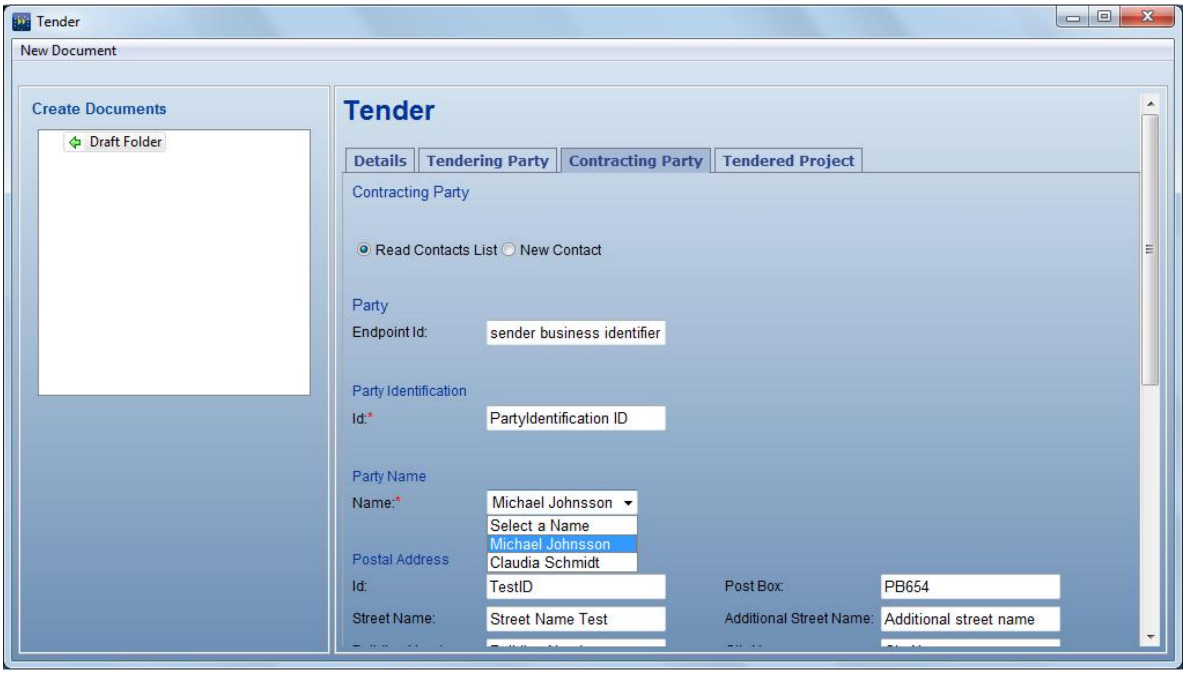


Figure 20: Contracting Party tab form

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

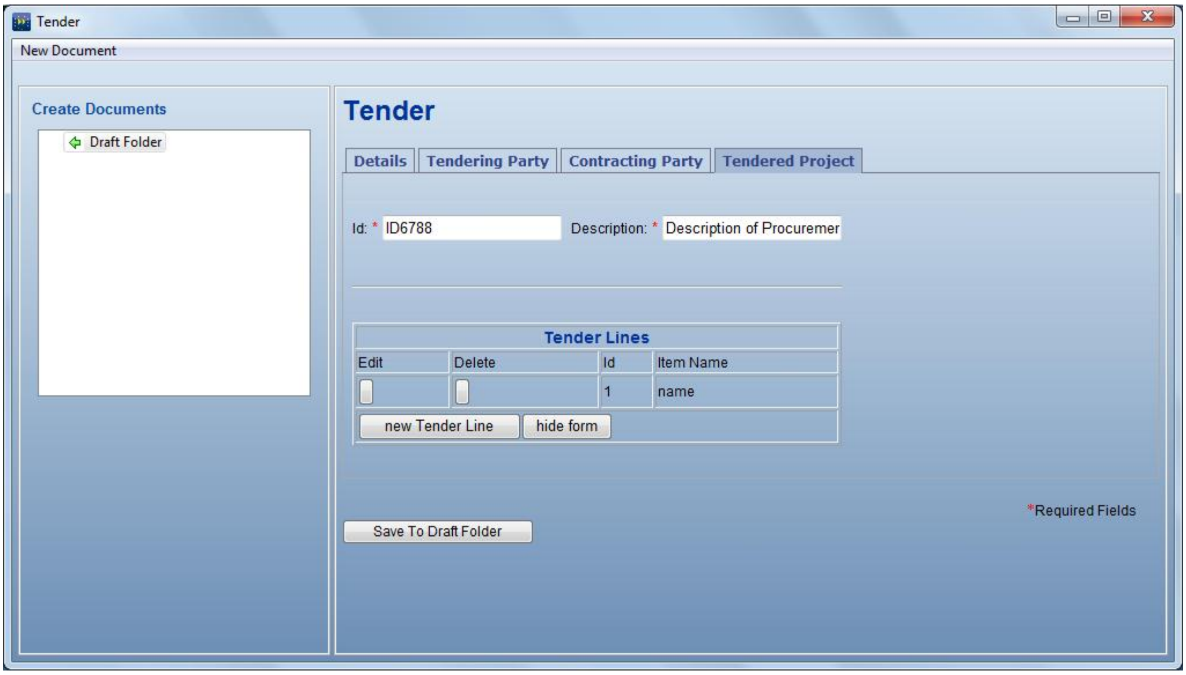


Figure 21: Tendered Project tab with Tender lines

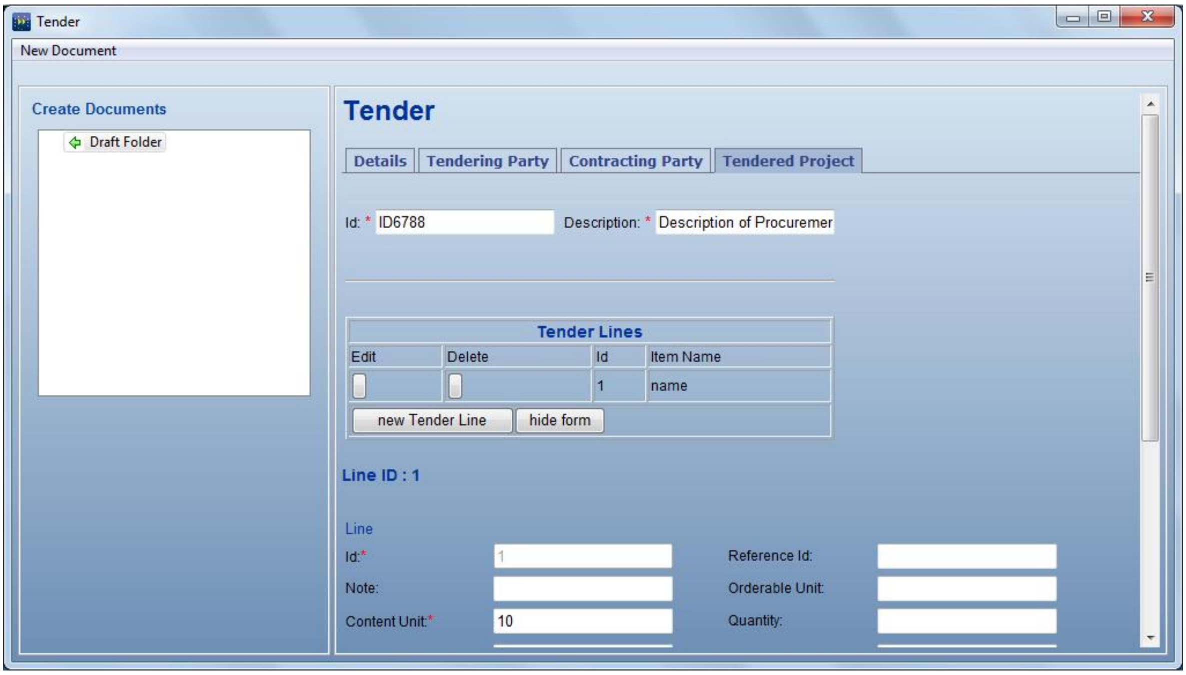


Figure 22: Editing a Tender Line

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

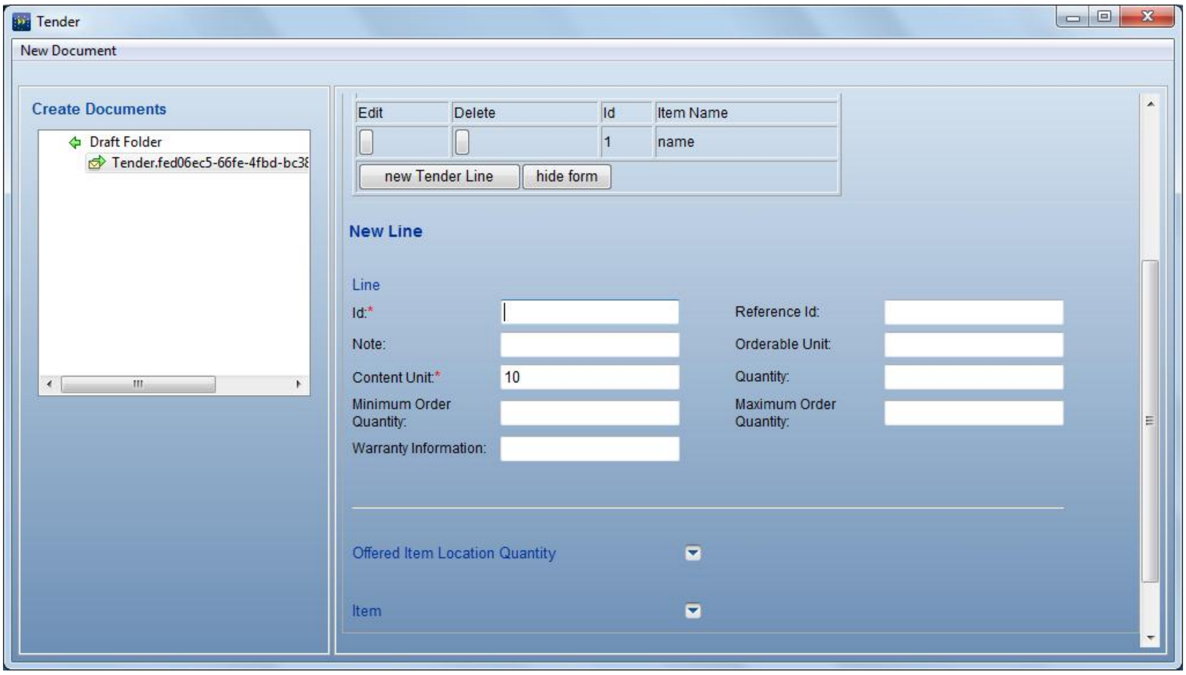


Figure 23: Creating a new Tender Line

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

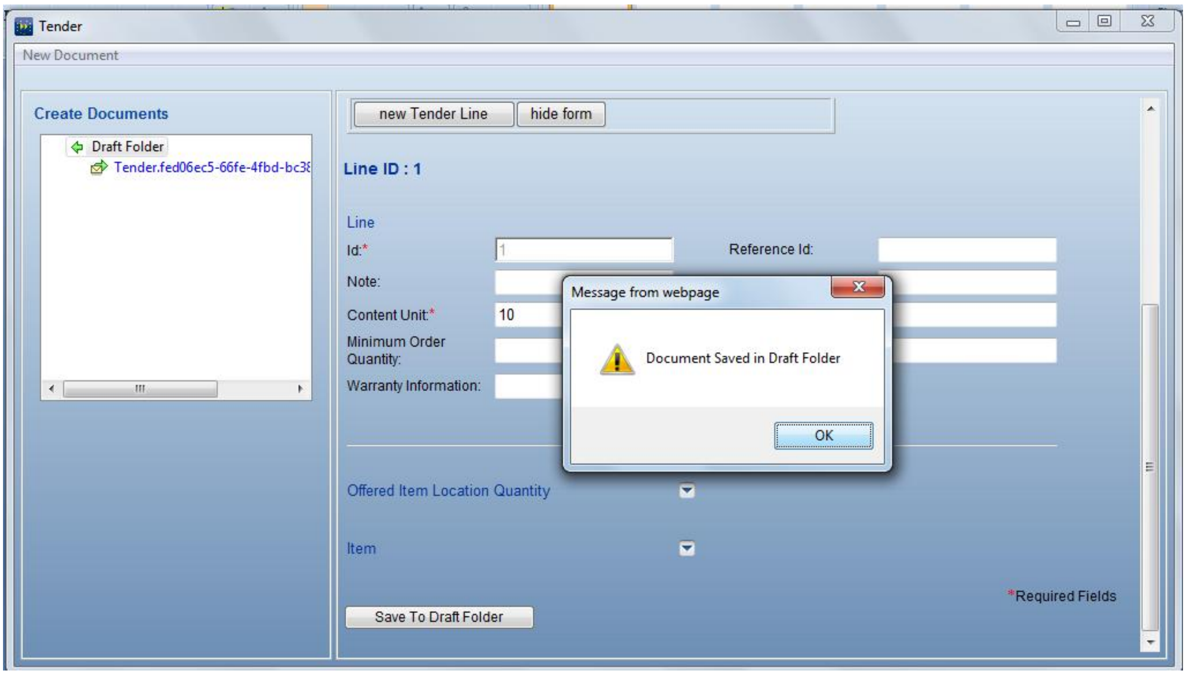


Figure 24: Saving the Tender in Draft document

Before to export the Tender and send it to a Ca, could be effective for the EcOp to validate his own catalogue using the validation button. The Validation functionalities describe as well errors e gives to the EcOp the possibility to correct values.

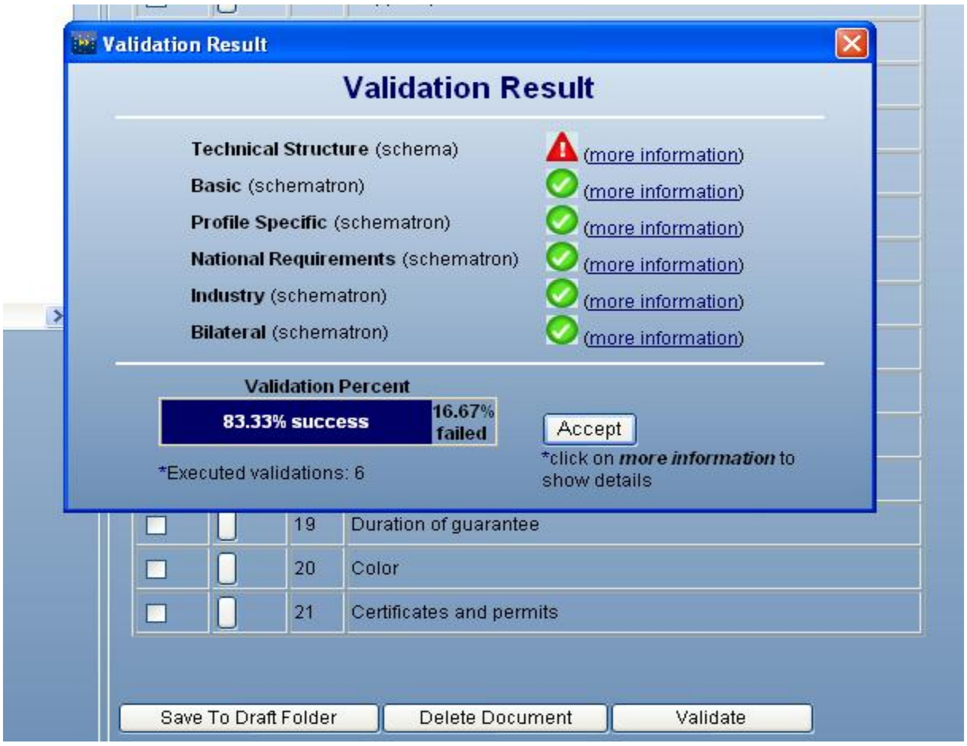


Figure – the EcOp can click on validate button to check the catalogue before to submit