



Guideline



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PreAward - eCat

PEPPOL eCatalogue Demo Client User Guide

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Editors:
Joan Farfan Armas (Alfa1Lab)
Leonardo Bertini (Consip)



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Contributors

Organisations

Consip, Italy, <http://www.eng.consip.it/on-line/en/Home.html>

Persons

Leonardo Bertini (Consip)
Giancarlo De Stefano (Consip)
Selmin Ustaoglu (Consip)
Angela Roca Márquez (Alfa1lab)
Joan Farfan Armas (Alfa1lab)
Ornella Serio IBM Italia S.p.A.
Silvana D'Auria IBM Italia S.p.A.

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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 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).

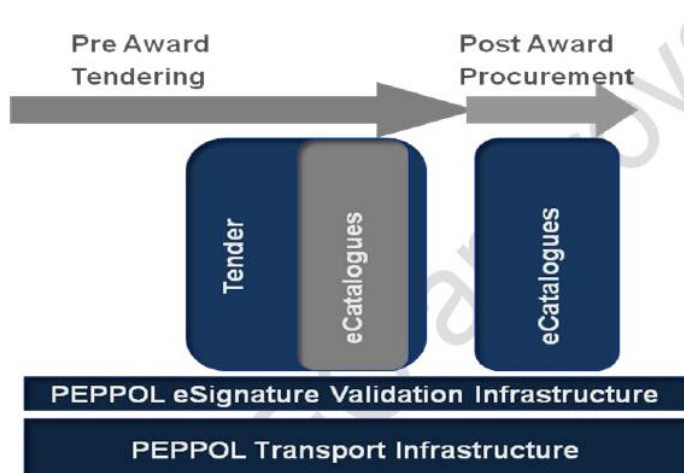


Figure 1 : eCatalogue Scope

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 Authorities) can set up a CallForTender document, or Economic Operator can prepare a Tender document (to respond 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

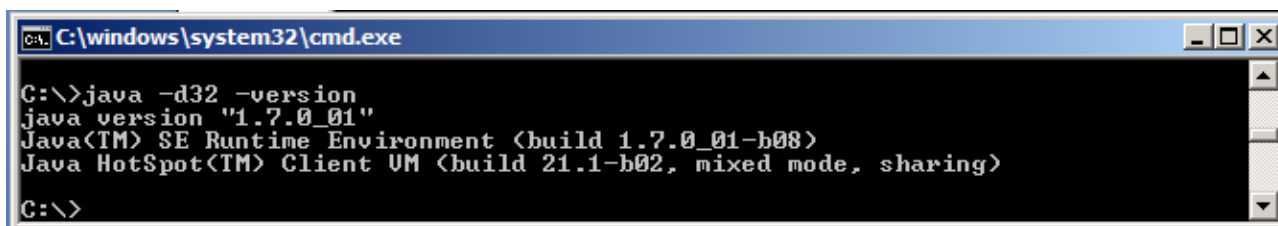
2.1.1 Java Version

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:



```
C:\windows\system32\cmd.exe

C:\>java -d32 -version
java version "1.7.0_01"
Java(TM) SE Runtime Environment (build 1.7.0_01-b08)
Java HotSpot(TM) Client VM (build 21.1-b02, mixed mode, sharing)

C:\>
```

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.

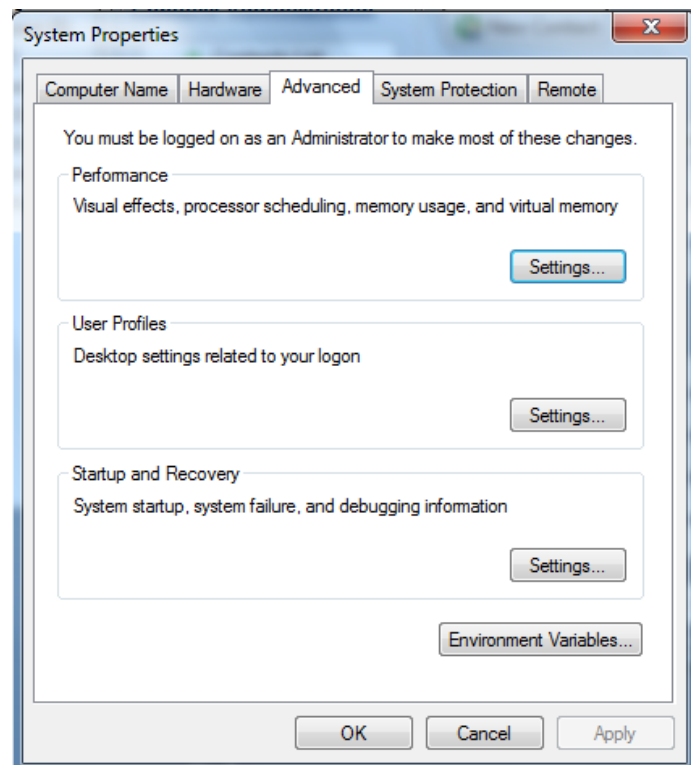


Figure 1: Opening Environment Variables interface

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.

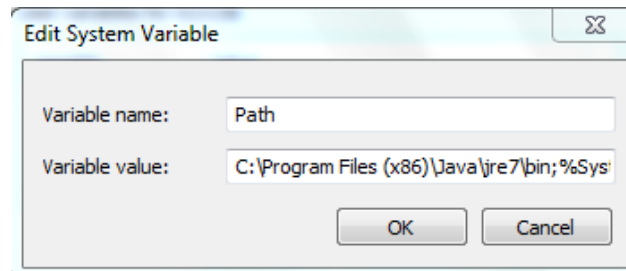


Figure 2 : Modifying environment variables

Modify the path and click on ok.

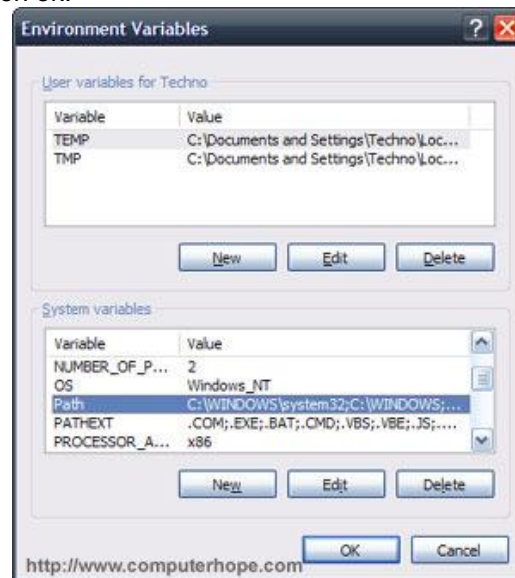


Figure 3: Opening Environment Variables interface

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

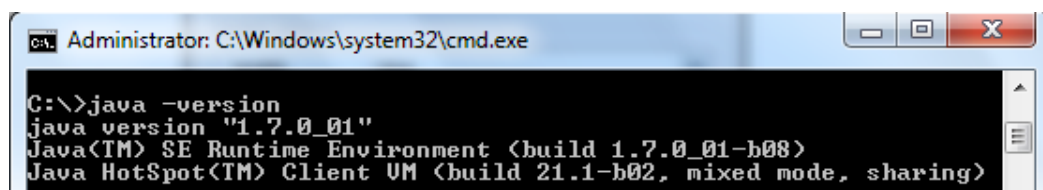


Figure 4: Testing java version

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:

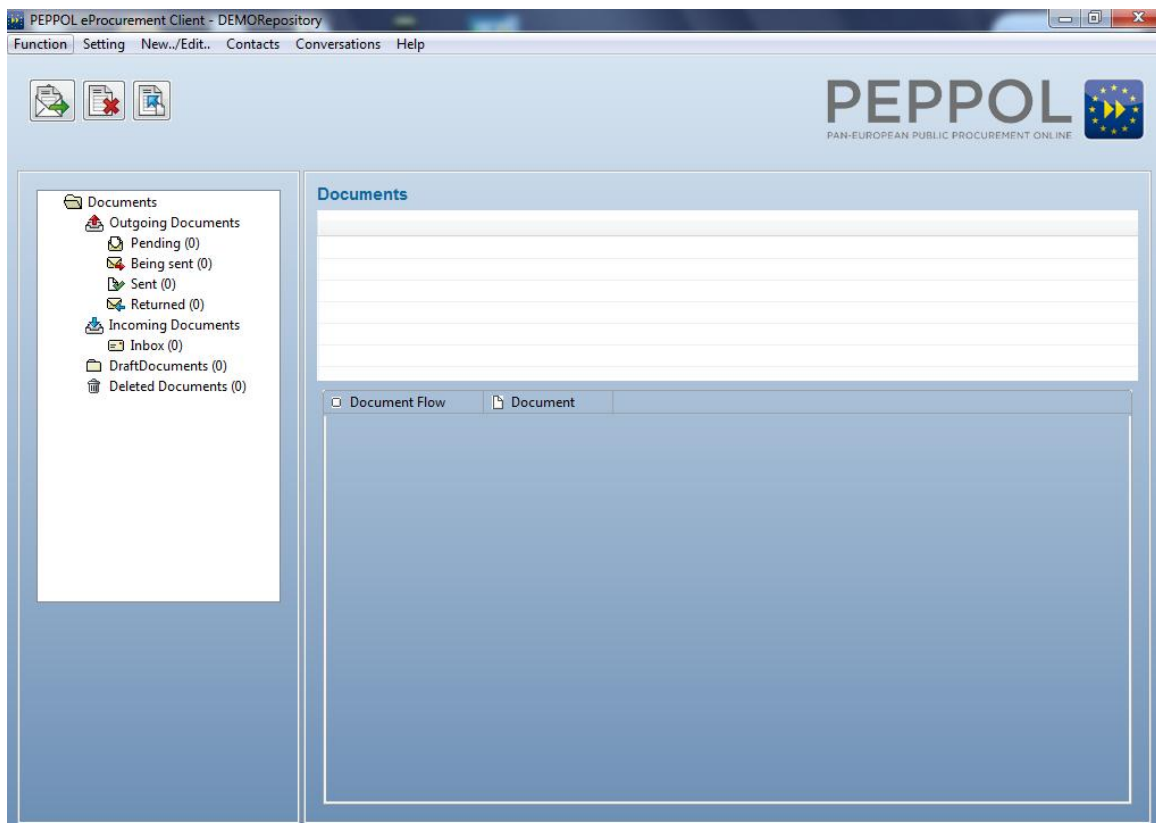


Figure 5: Demo client starting window

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:

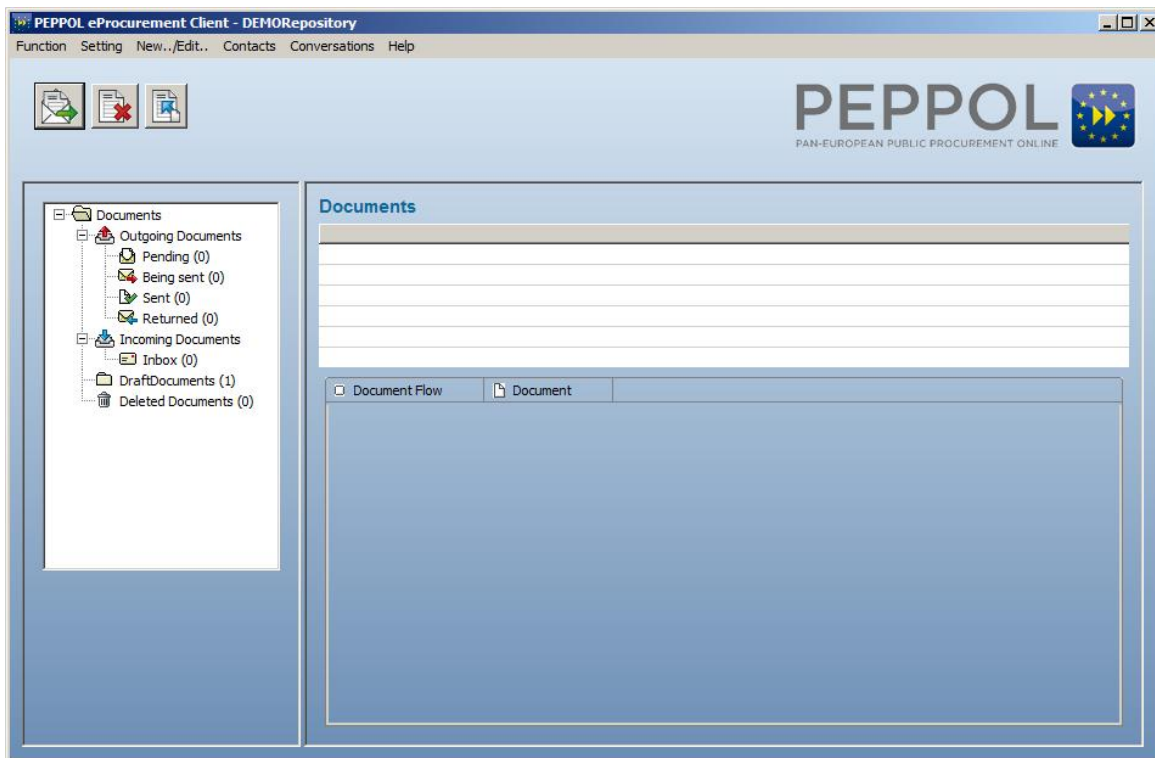


Figure 6: Demo client

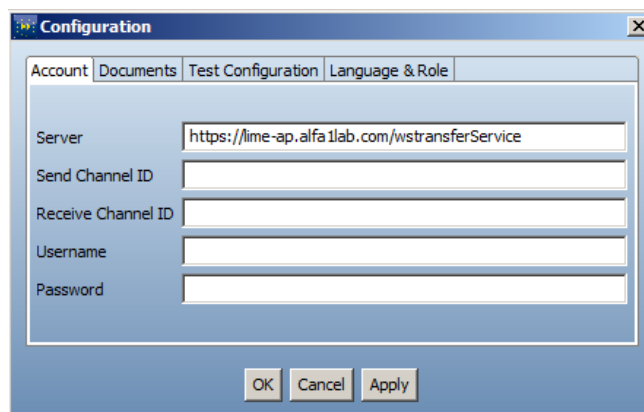
2.4 Select your language

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:

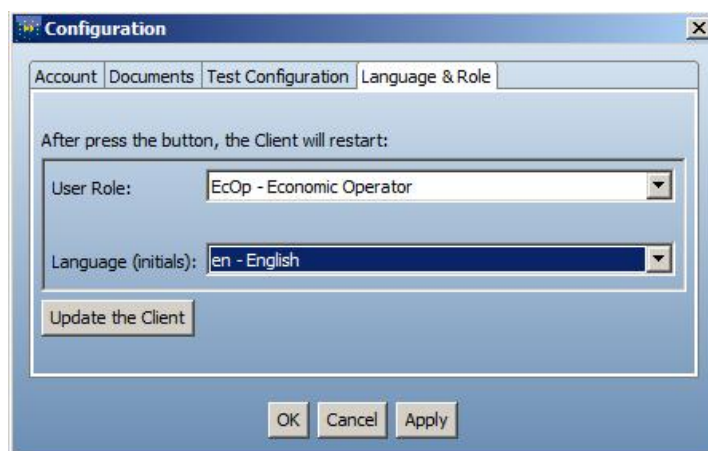


The 'Configuration' window has four tabs: 'Account', 'Documents', 'Test Configuration', and 'Language & Role'. The 'Test Configuration' tab is active. It contains five text input fields: 'Server' (pre-filled with 'https://lime-ap.alfa1lab.com/wstransferService'), 'Send Channel ID', 'Receive Channel ID', 'Username', and 'Password'. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

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;



The 'Configuration' window has the 'Language & Role' tab active. It displays the text 'After press the button, the Client will restart:'. Below this are two dropdown menus: 'User Role:' (selected 'EcOp - Economic Operator') and 'Language (initials):' (selected 'en - English'). An 'Update the Client' button is below the dropdowns. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

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 “Browse” 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 “Browse” button and select a folder on your machine.
4. Press “OK” button to save your settings.

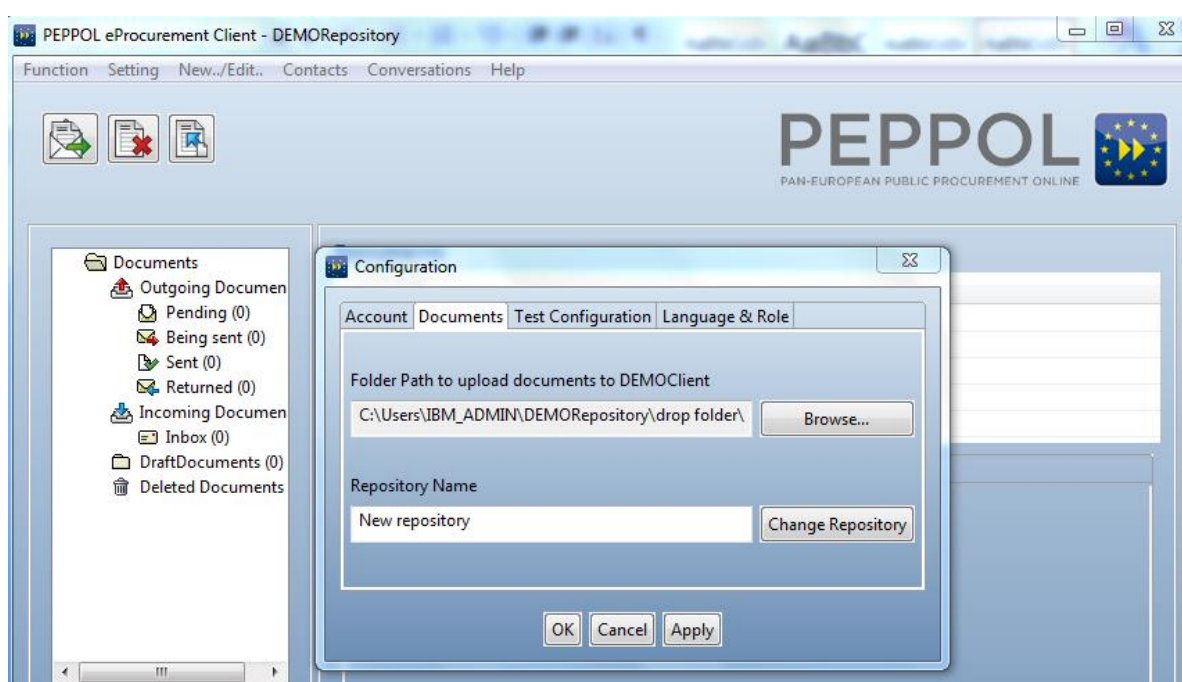


Figure 9: Configuring document repositories

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 “*Settings/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.

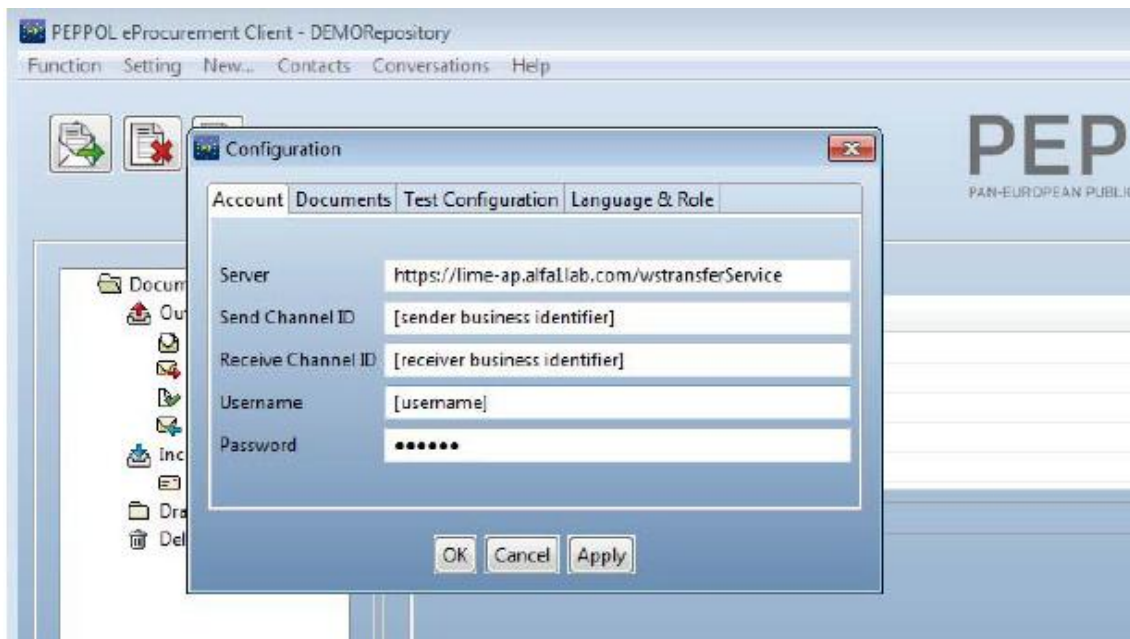


Figure 10: Setup account information

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.

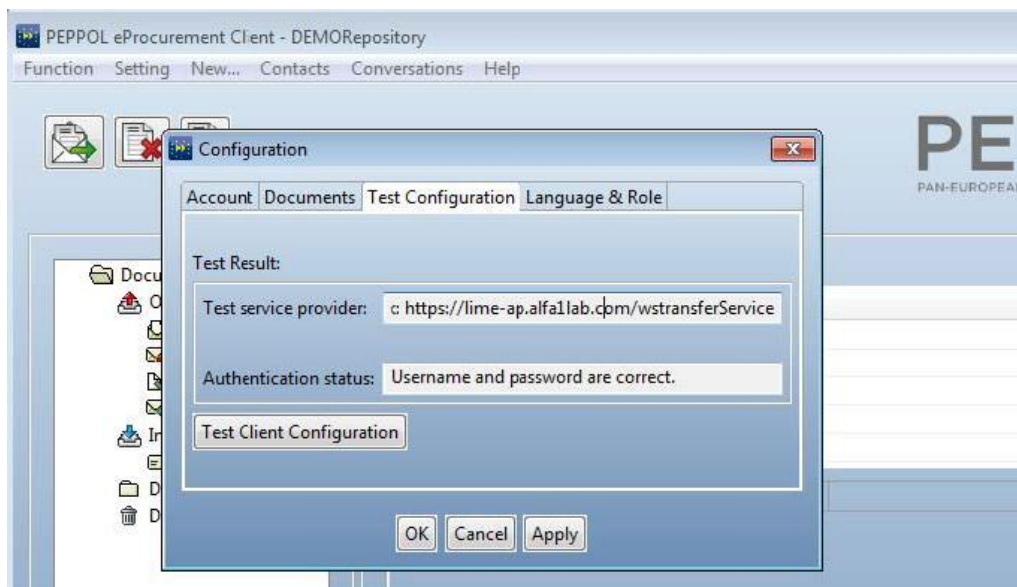


Figure 11: Testing account configuration

2.9 Create, delete or edit your contacts

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

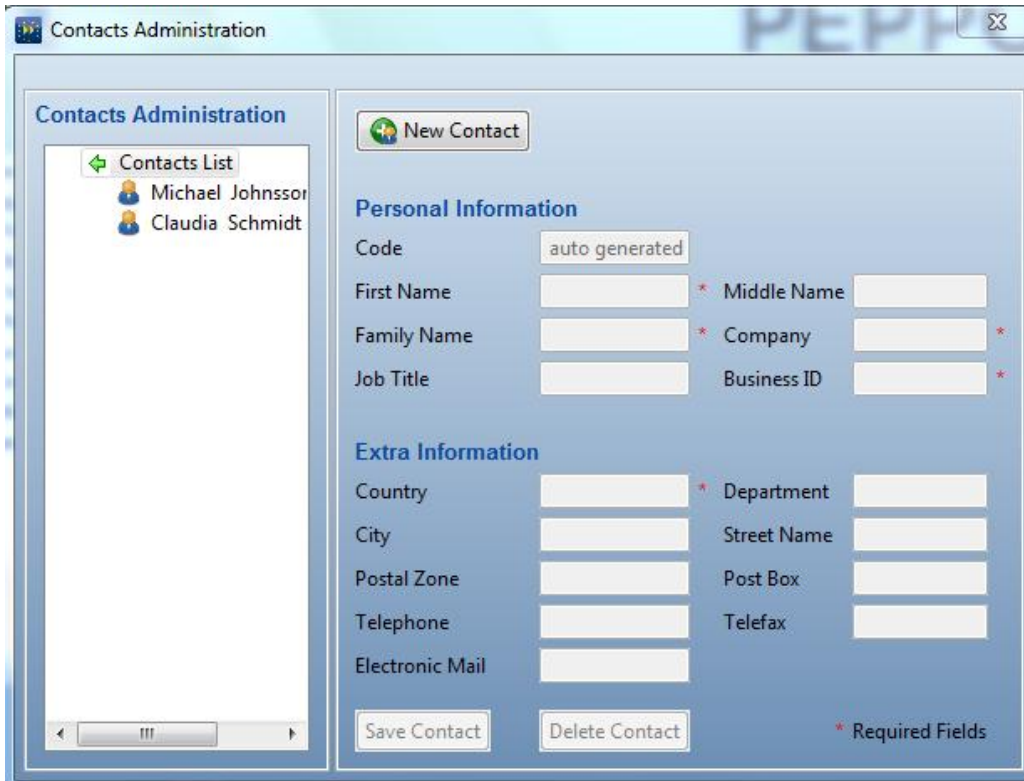


Figure 12: Editing contacts

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"

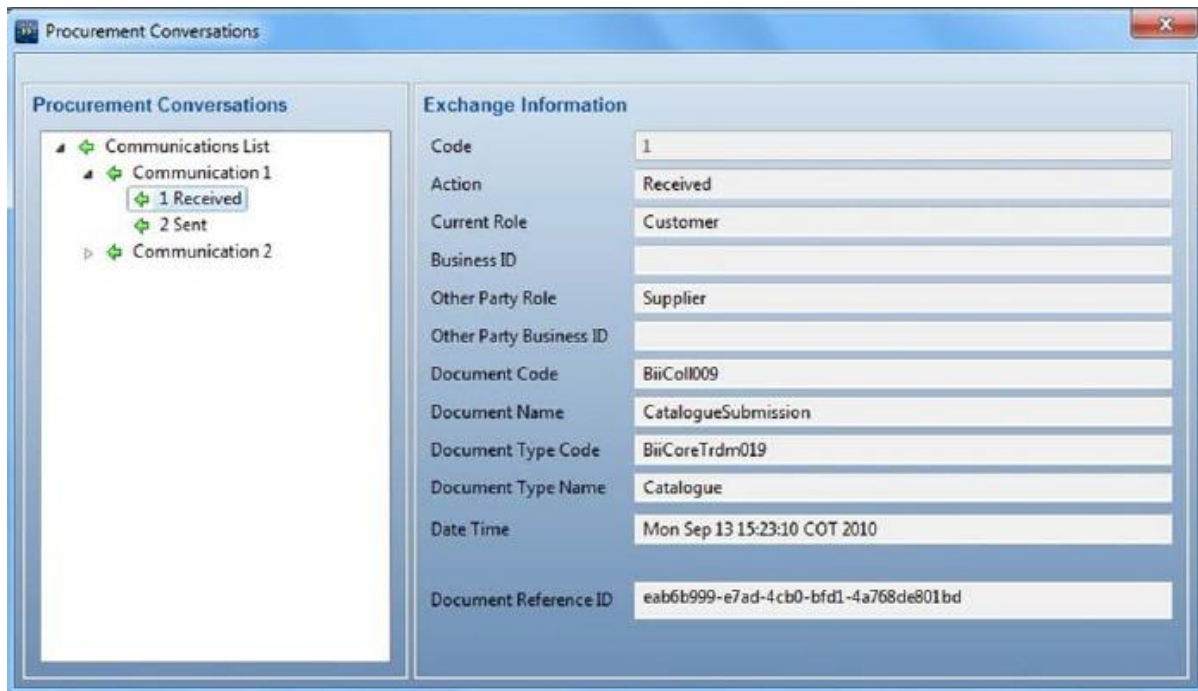


Figure 13: Communication log

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.

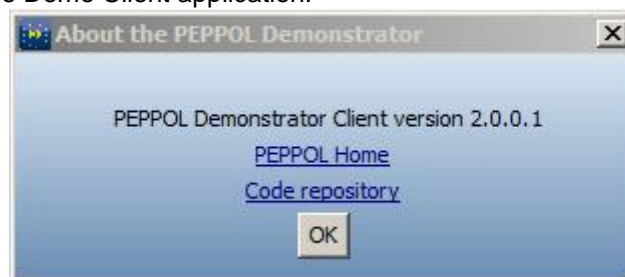


Figure 14: About window

3 Pre - Award Phase

3.1 Contracting Authority (Ca) functions

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

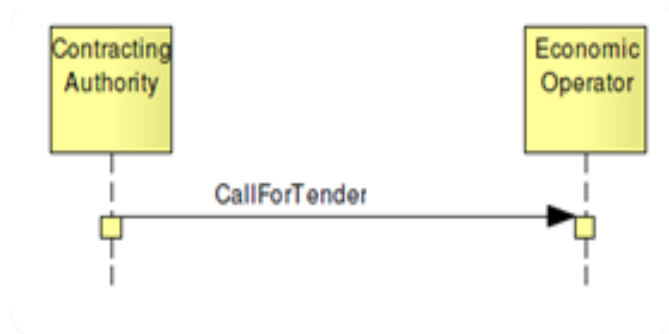


Figure 1: Graphic provided from CenBii

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

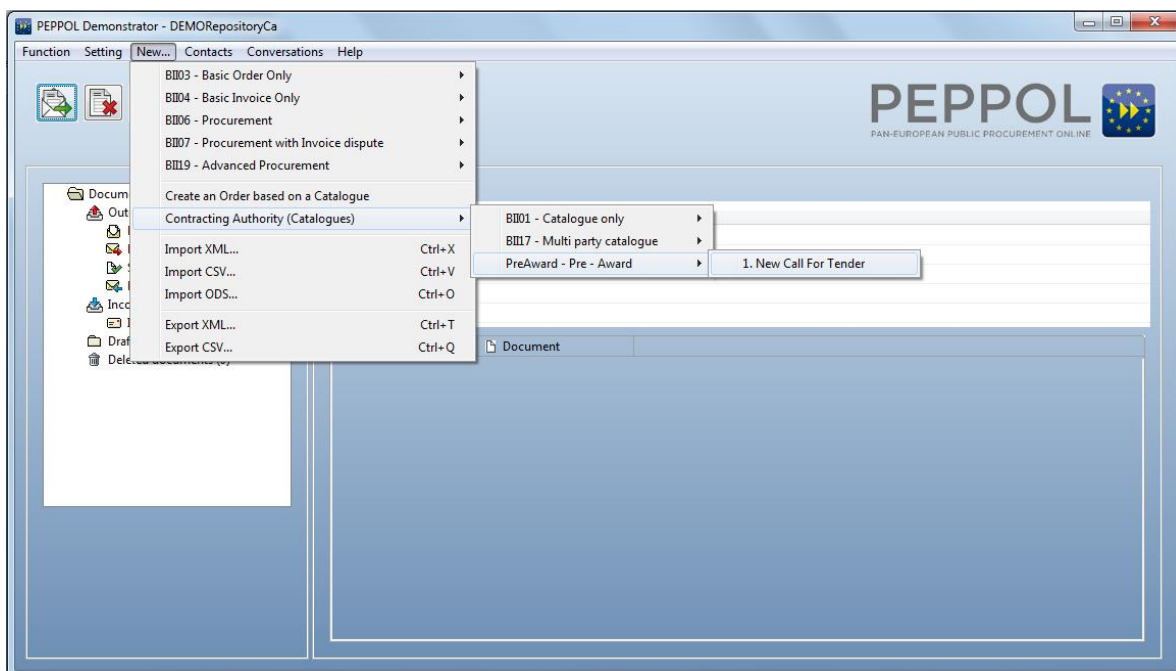


Figure 2: Selecting the New CallForTender option

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

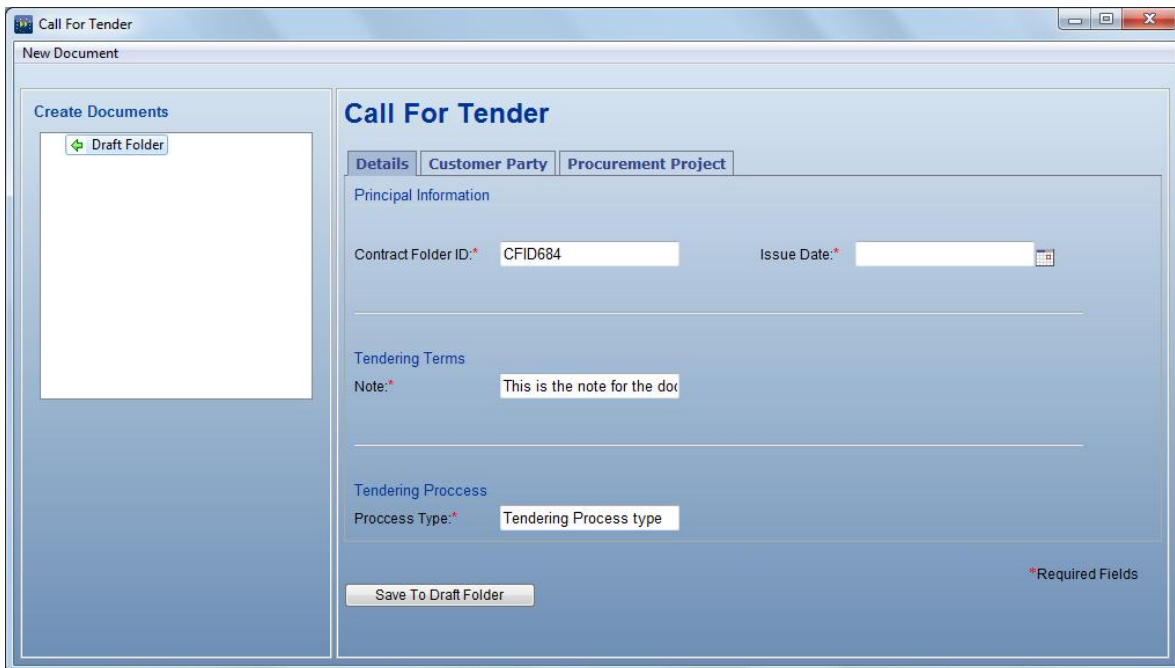


Figure 3: Detail tab form

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).

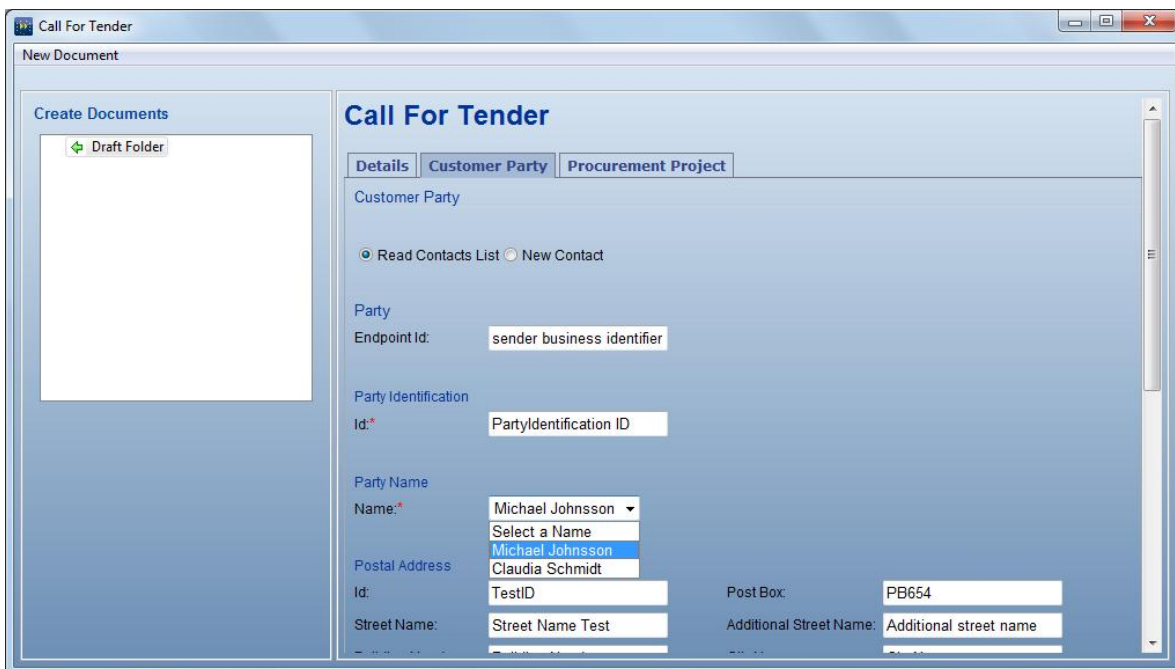


Figure 4: Customer Party tab form

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

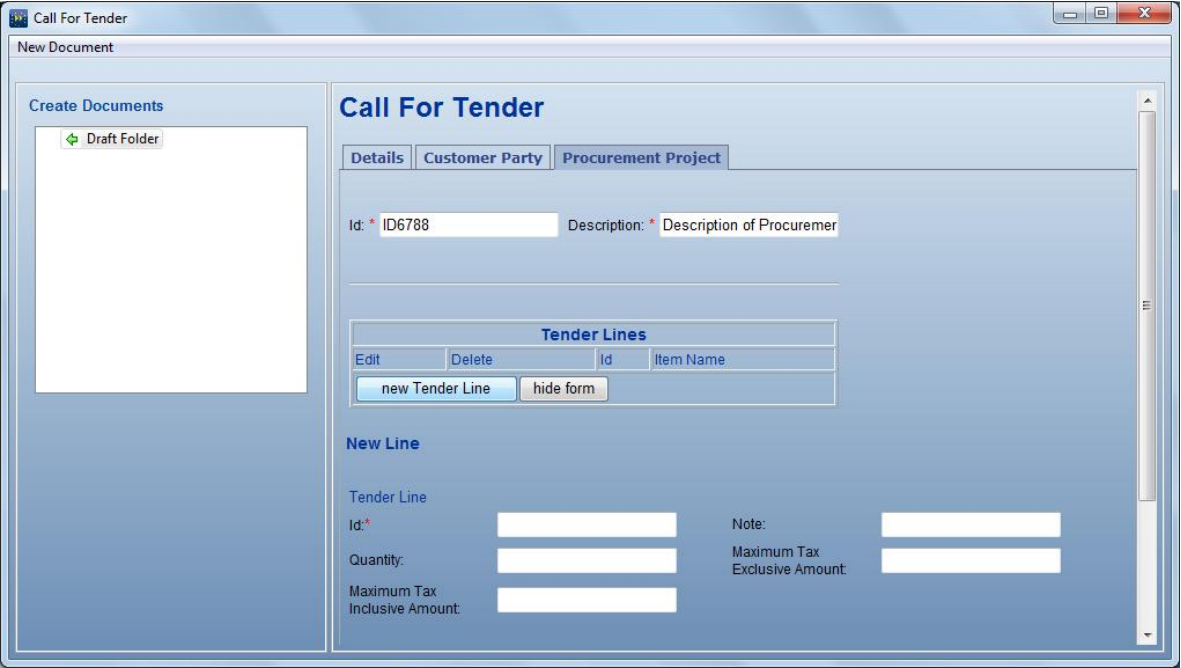
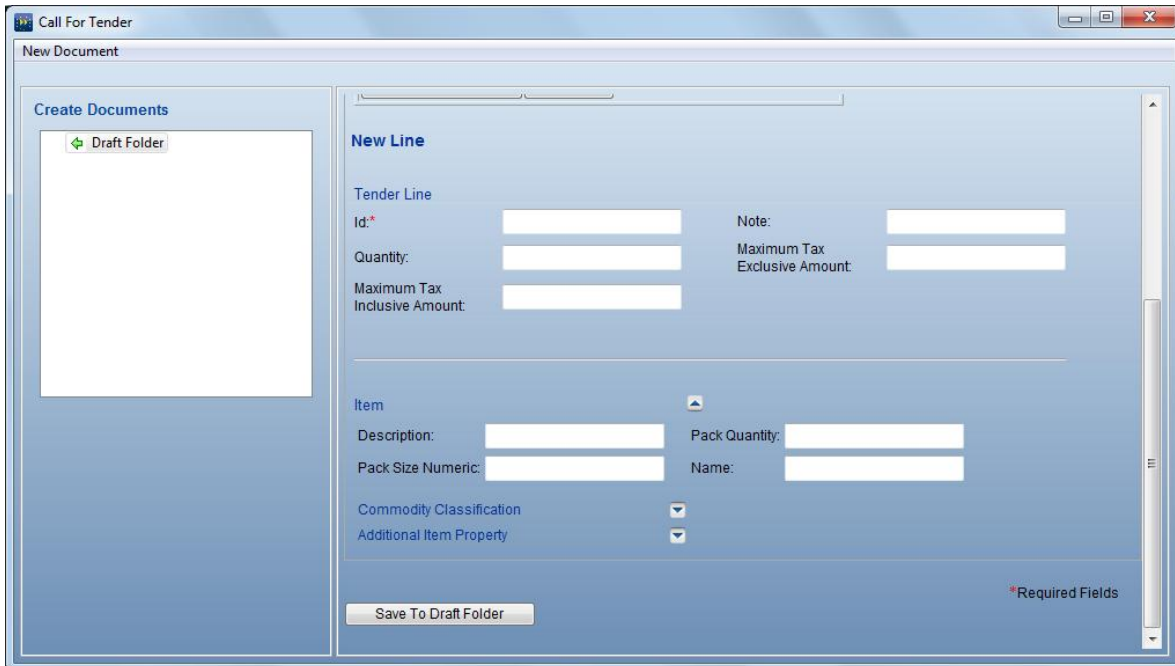


Figure 6: Pressing the New Request for Tender Line button



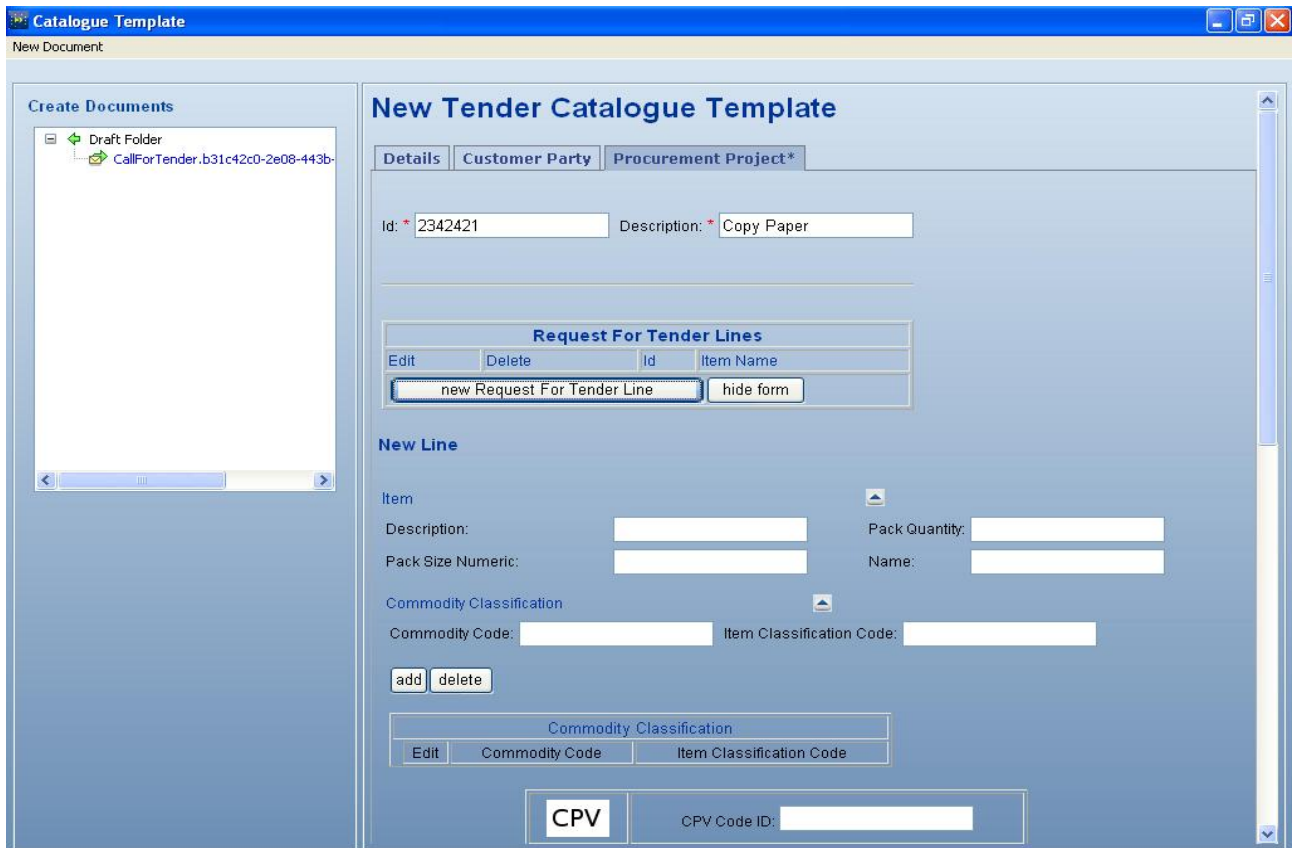
The screenshot shows a web application window titled "Call For Tender". Inside, there's a "New Document" section on the left with a "Draft Folder" button. The main area is titled "New Line" and contains a "Tender Line" section with fields for "Id.*", "Quantity", "Maximum Tax Inclusive Amount", "Note", "Maximum Tax Exclusive Amount", and "Item". Below this is an "Item" section with fields for "Description", "Pack Quantity", "Pack Size Numeric", and "Name". There are also dropdown menus for "Commodity Classification" and "Additional Item Property". At the bottom, there's a "Save To Draft Folder" button and a legend indicating that fields marked with an asterisk (*) are required.

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.

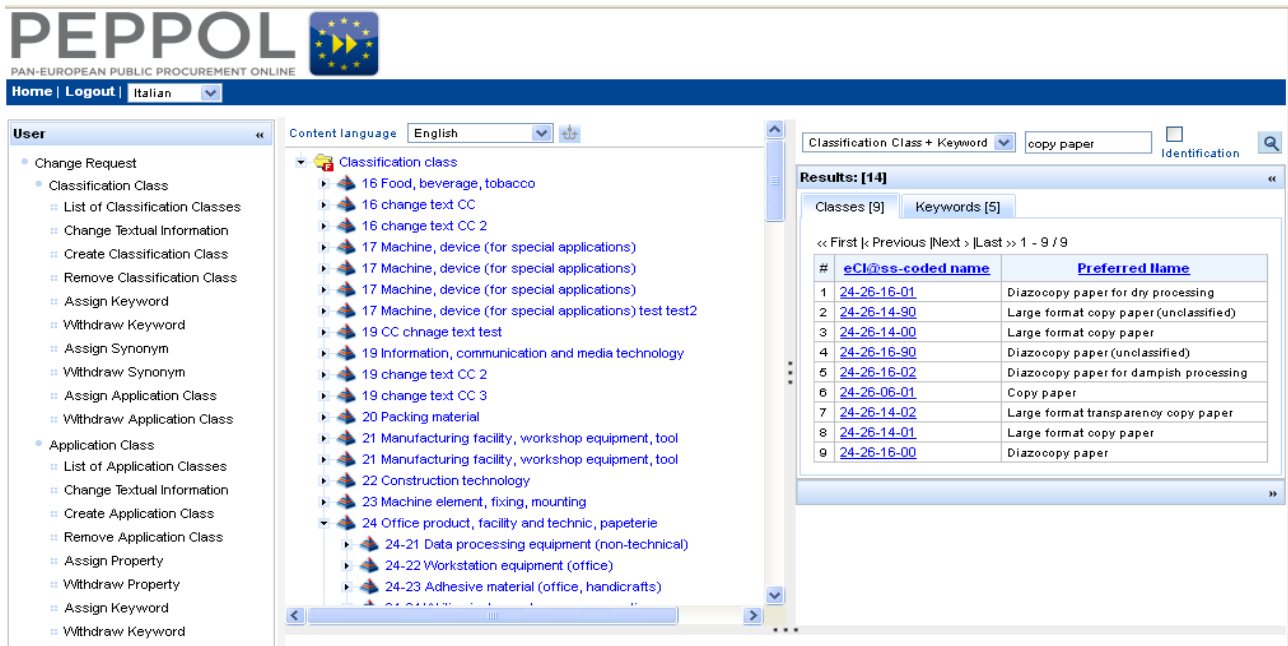
The Ca could click on the CPV button to go on the EU web site and download the CVP codes, and after click on the PPS button to go on the PPS on line Data Base (in cooperation with eClass).



The screenshot shows the 'New Tender Catalogue Template' form in the PEPPOL eCatalogue Demo Client. The form is titled 'New Document' and has a 'Create Documents' sidebar on the left. The main form area is divided into sections: 'Details', 'Customer Party', and 'Procurement Project*'. The 'Details' section contains fields for 'Id' (2342421) and 'Description' (Copy Paper). Below this is a 'Request For Tender Lines' section with a table containing one row: 'new Request For Tender Line'. The 'New Line' section contains fields for 'Item', 'Description', 'Pack Quantity', 'Pack Size Numeric', 'Name', 'Commodity Classification', 'Commodity Code', 'Item Classification Code', and 'CPV'. The 'Commodity Classification' section has 'add' and 'delete' buttons. The 'CPV' section has a 'CPV Code ID' field.

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.



Additional Item Property

Id: Name:

Test Method: Value:

List Value:

Item Property Range

Minimum Value Text: Maximum Value Text:

Item Property Group:

| Additional Item Property | | |
|--------------------------|--------------------------------|------------------------------|
| | Edit | Name |
| <input type="checkbox"/> | <input type="text" value="1"/> | Product type description |
| <input type="checkbox"/> | <input type="text" value="2"/> | Manufacturer name |
| <input type="checkbox"/> | <input type="text" value="3"/> | Product name |
| <input type="checkbox"/> | <input type="text" value="4"/> | customs tariff number |
| <input type="checkbox"/> | <input type="text" value="5"/> | additional link address |
| <input type="checkbox"/> | <input type="text" value="6"/> | REACH designation obligatory |
| <input type="checkbox"/> | <input type="text" value="7"/> | Supplier product number |
| <input type="checkbox"/> | <input type="text" value="8"/> | Manufacturer product number |
| <input type="checkbox"/> | <input type="text" value="9"/> | Number of sheets per packing |

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

| List Value | | |
|--------------------------|----------------------|-------------------------------|
| | Edit | List Value |
| <input type="checkbox"/> | <input type="text"/> | DIN A0 = 84.1 cm x 118.9 cm |
| <input type="checkbox"/> | <input type="text"/> | DIN A1 = 59.4 cm x 84.1 cm |
| <input type="checkbox"/> | <input type="text"/> | DIN A2 = 42.0 cm x 59.4 cm |
| <input type="checkbox"/> | <input type="text"/> | DIN A3 = 29.7 cm x 42.0 cm |
| <input type="checkbox"/> | <input type="text"/> | DIN A4 = 21.0 cm x 29.7 cm |
| <input type="checkbox"/> | <input type="text"/> | DIN A5 = 14.8 cm x 21.0 cm |
| <input type="checkbox"/> | <input type="text"/> | DIN A6 = 10.5 cm x 14.8 cm |
| <input type="checkbox"/> | <input type="text"/> | DIN 2A0 = 118.9 cm x 168.2 cm |
| <input type="checkbox"/> | <input type="text"/> | DIN 4A0 = 168.2 cm x 237.8 cm |
| <input type="checkbox"/> | <input type="text"/> | DIN A7 = 7.4 cm x 10.5 cm |
| <input type="checkbox"/> | <input type="text"/> | DIN A8 = 5.2 cm x 7.4 cm |
| <input type="checkbox"/> | <input type="text"/> | 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.

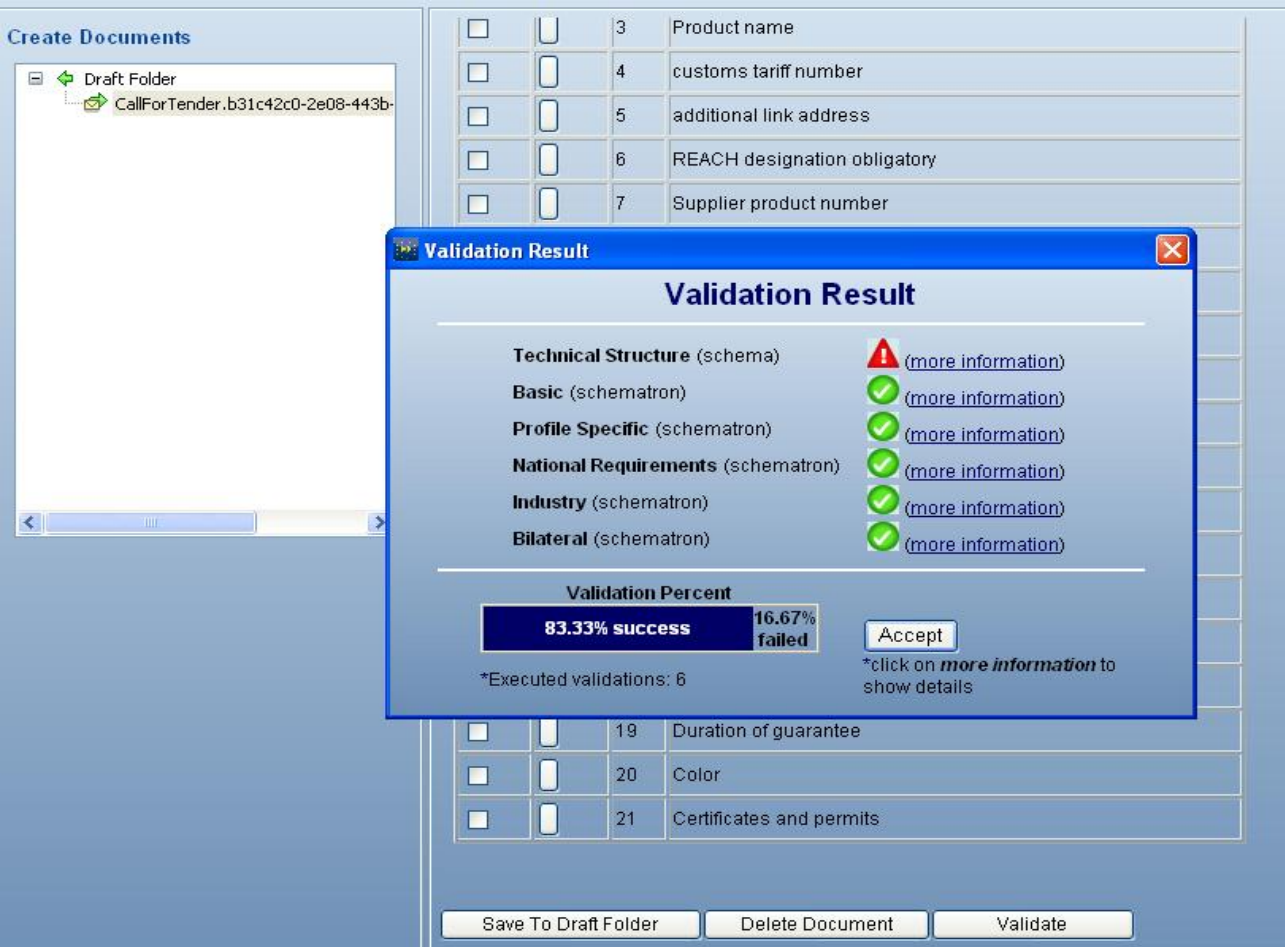


Figure – The CA Validate the Call for Tender

The CA save the document Call for Tender.

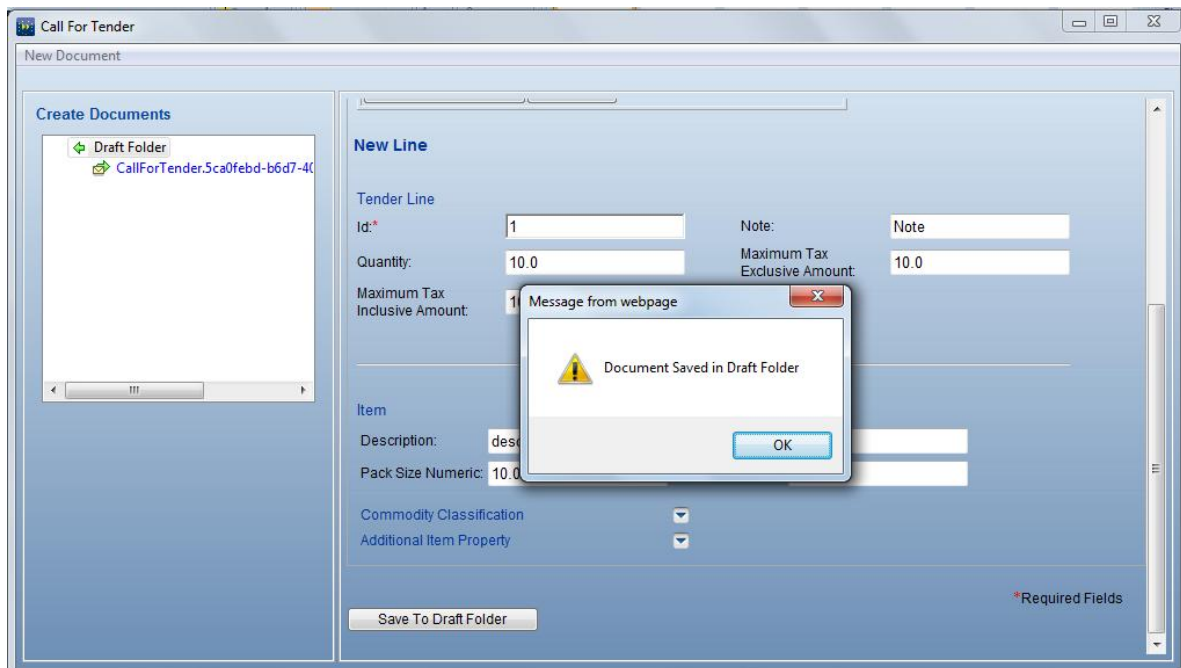


Figure 8: Saving in Draft Folder

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

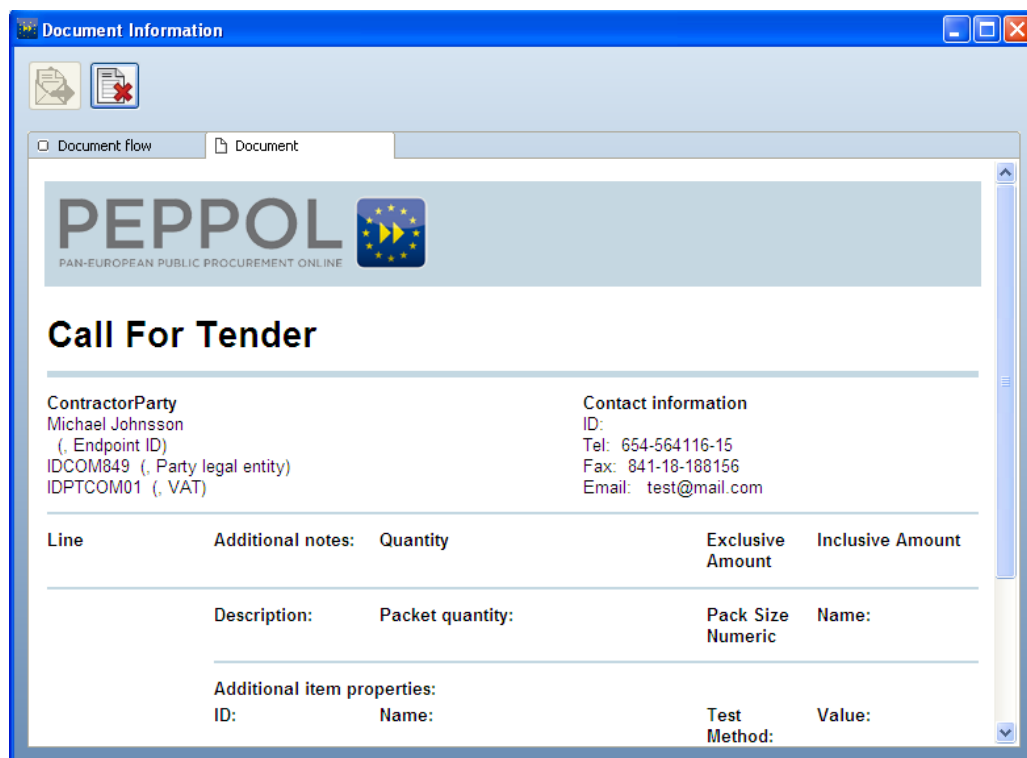


Figure 9: Displaying the document in the main interface

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.

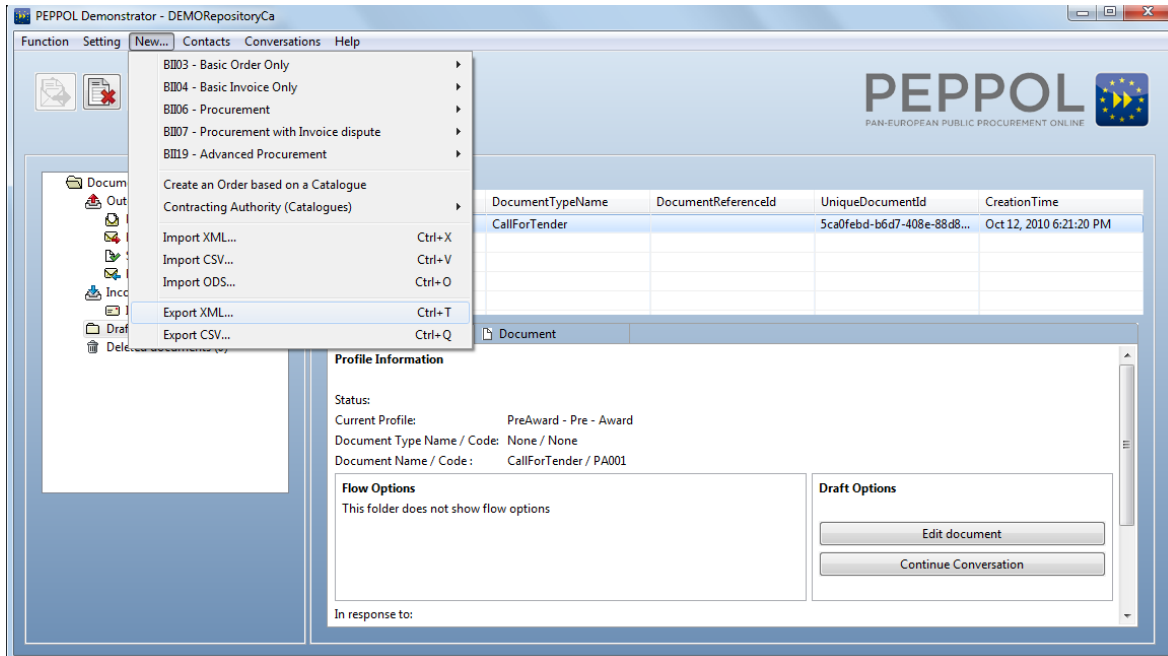


Figure 10: Export option

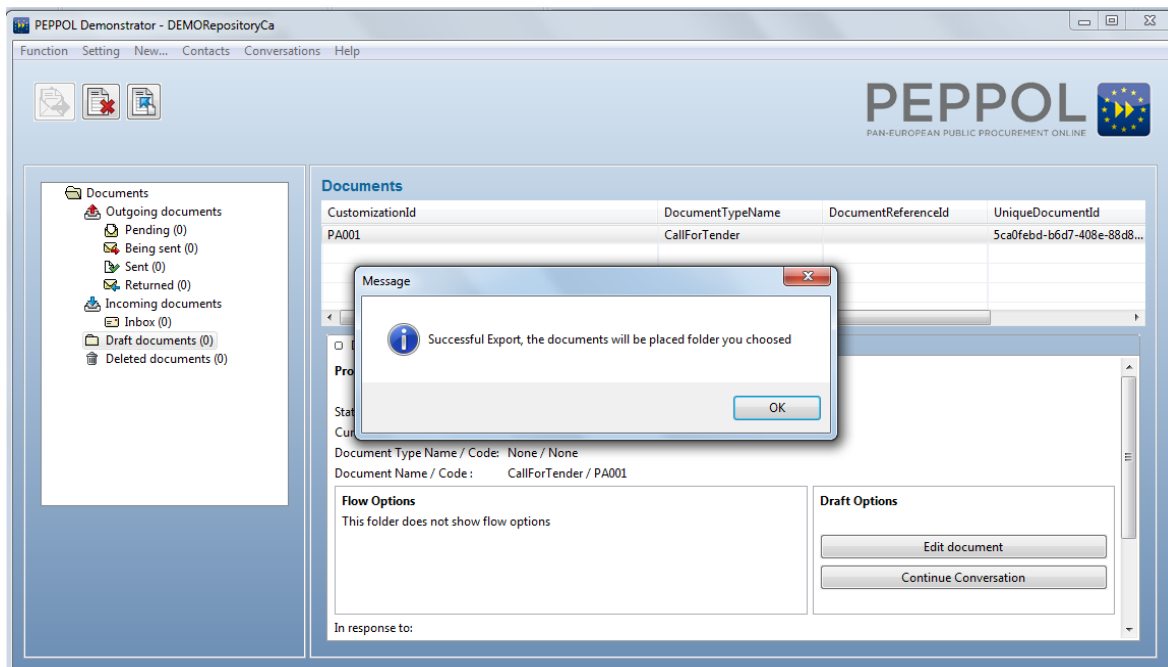


Figure 12: Message of the Export function

3.2 Economic Operator (EcOp) functions

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

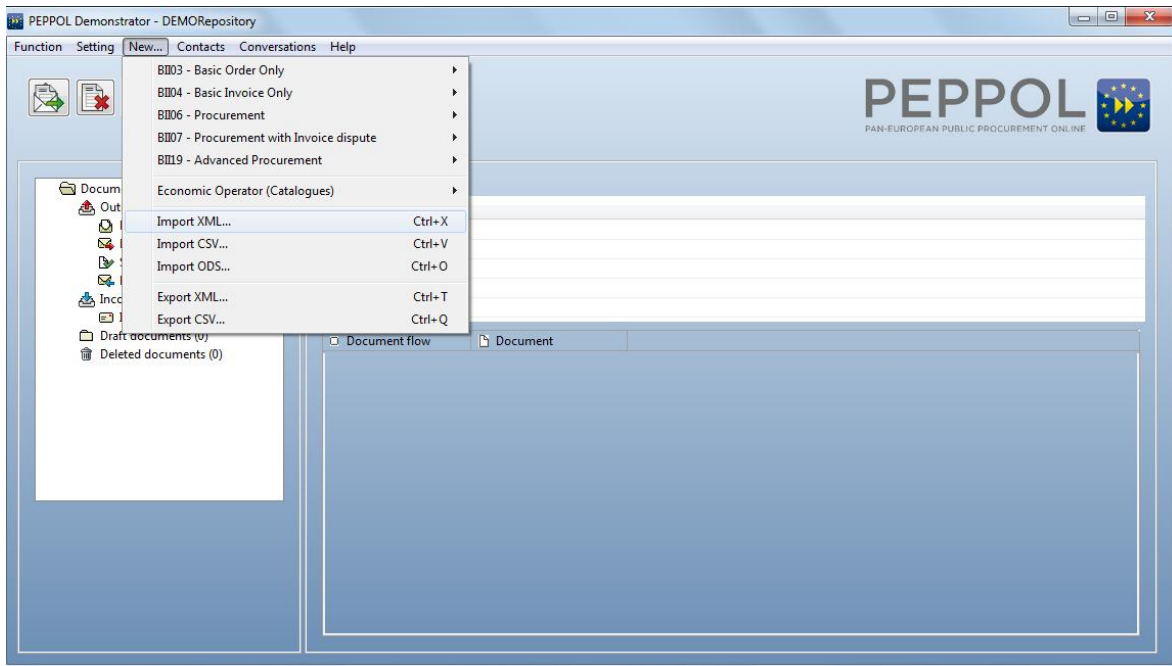


Figure 13: Import option

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

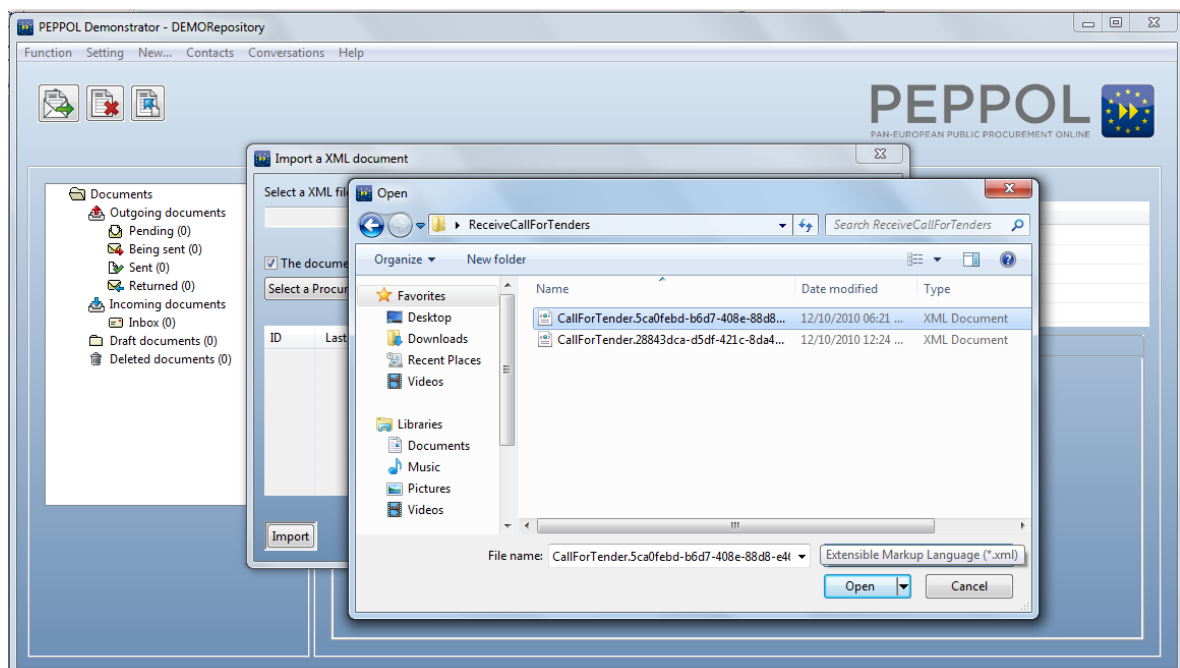


Figure 14: Import browsing

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

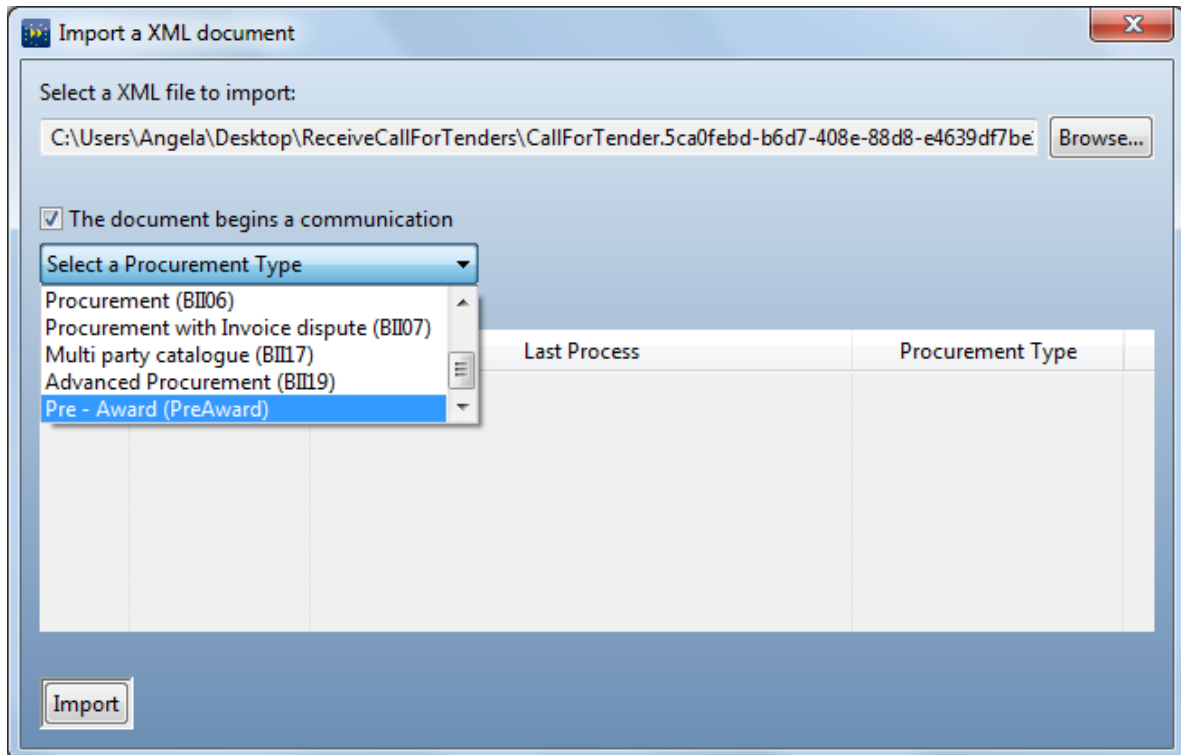


Figure 15: Selecting the correct procurement of the imported document

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.

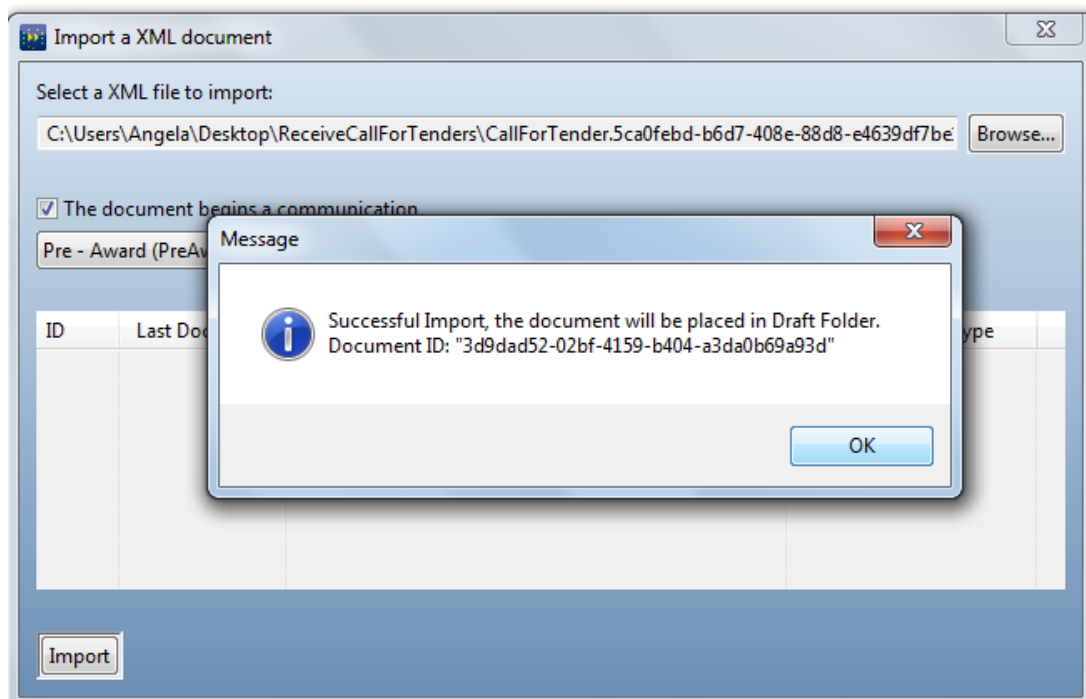


Figure 16: Message of the Importing function

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

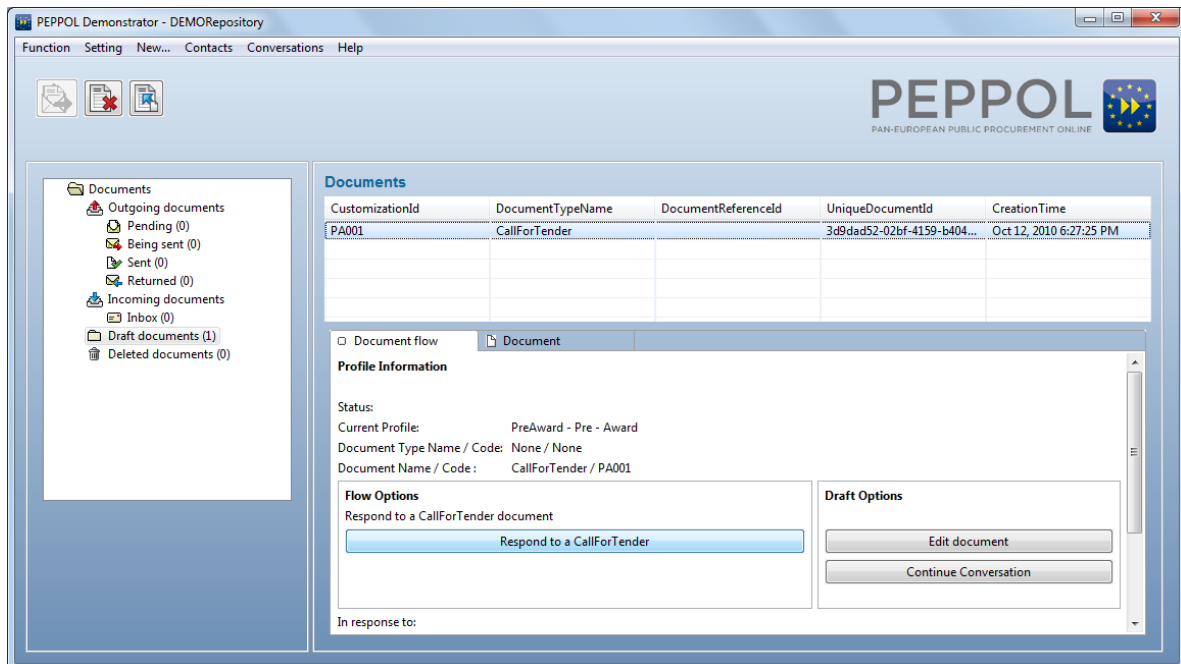


Figure 17: The Client shows the document in the Draft Folder

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.

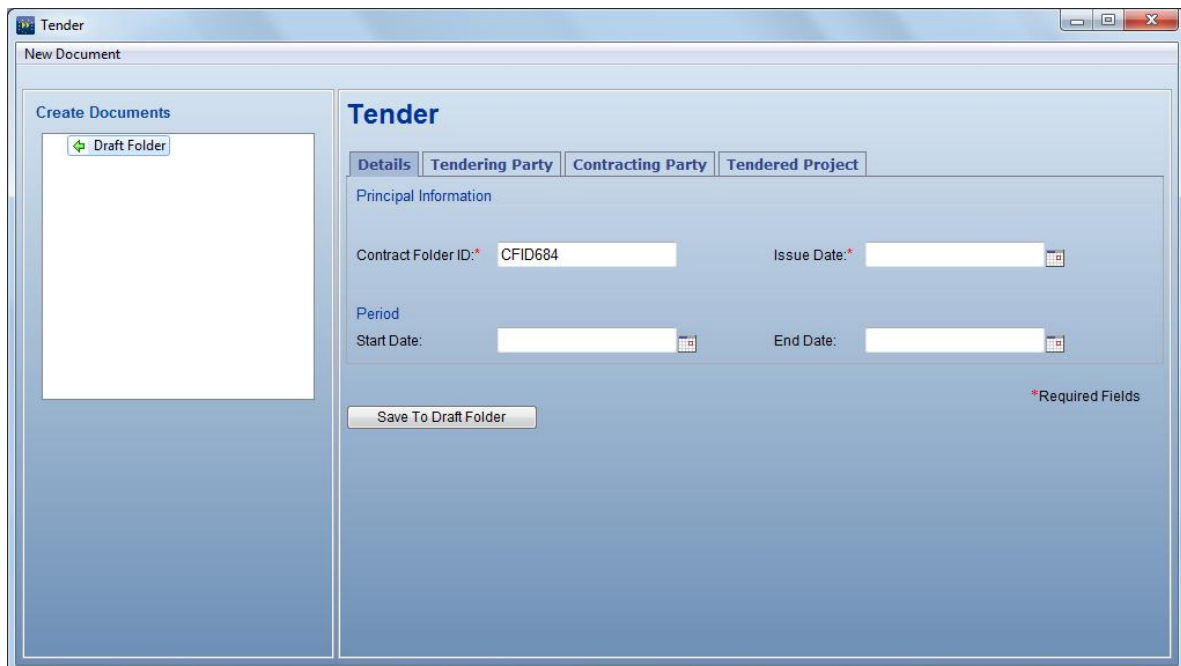
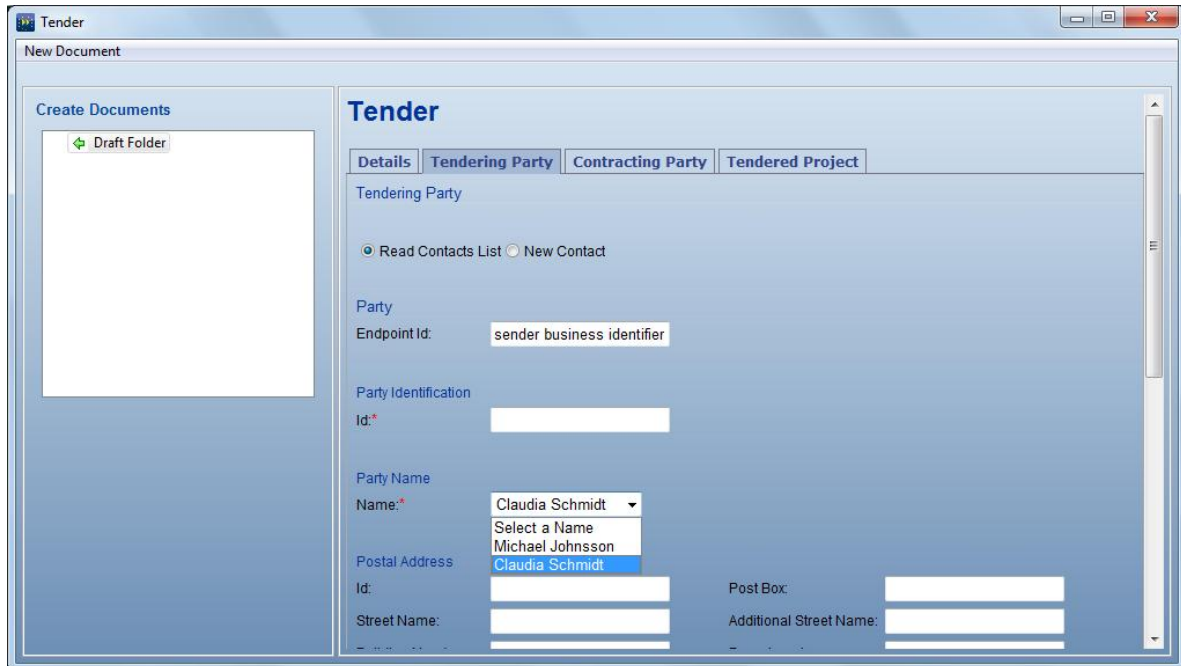


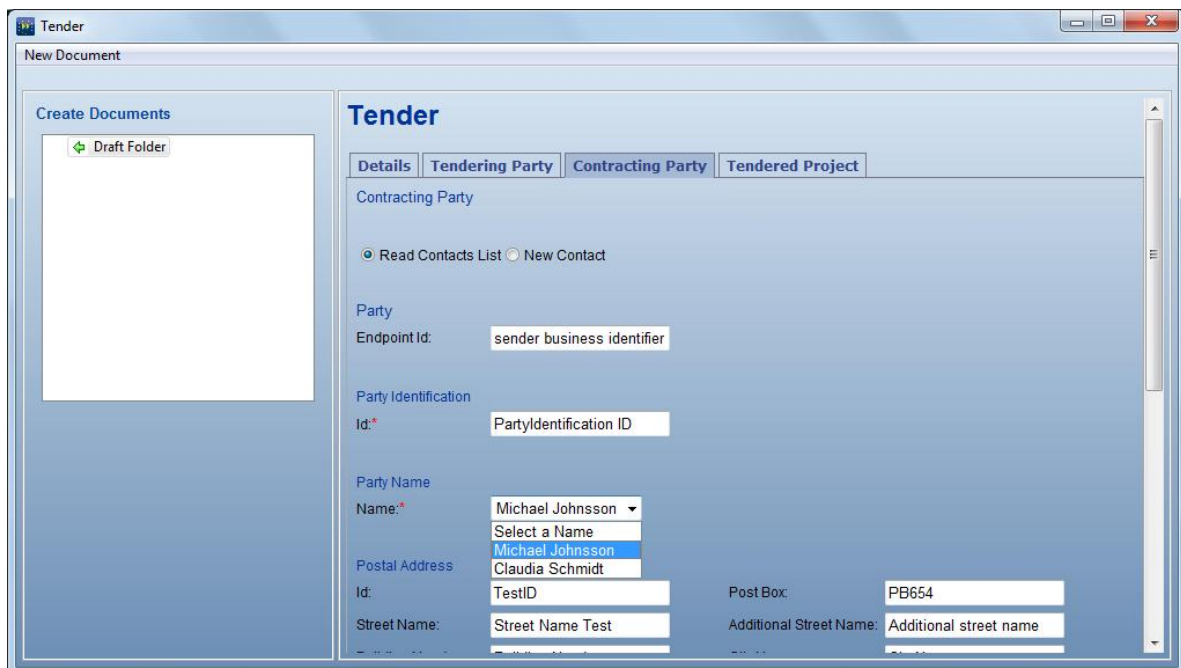
Figure 18: Detail tab form

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' window with the 'Tendering Party' tab selected. The form is titled 'Tendering Party' and includes a 'Read Contacts List' radio button and a 'New Contact' 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 a red asterisk. The 'Party Name' section has a 'Name' field with a dropdown menu showing 'Claudia Schmidt', 'Select a Name', 'Michael Johnsson', and 'Claudia Schmidt'. The 'Postal Address' section has an 'Id' field, a 'Street Name' field, a 'Post Box' field, and an 'Additional Street Name' field.

Figure 19: Tendering Party tab form



The screenshot shows the 'Tender' window with the 'Contracting Party' tab selected. The form is titled 'Contracting Party' and includes a 'Read Contacts List' radio button and a 'New Contact' 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 a red asterisk and the value 'PartyIdentification ID'. The 'Party Name' section has a 'Name' field with a dropdown menu showing 'Michael Johnsson', 'Select a Name', 'Michael Johnsson', and 'Claudia Schmidt'. The 'Postal Address' section has an 'Id' field, a 'Street Name' field, a 'Post Box' field, and an 'Additional Street Name' field.

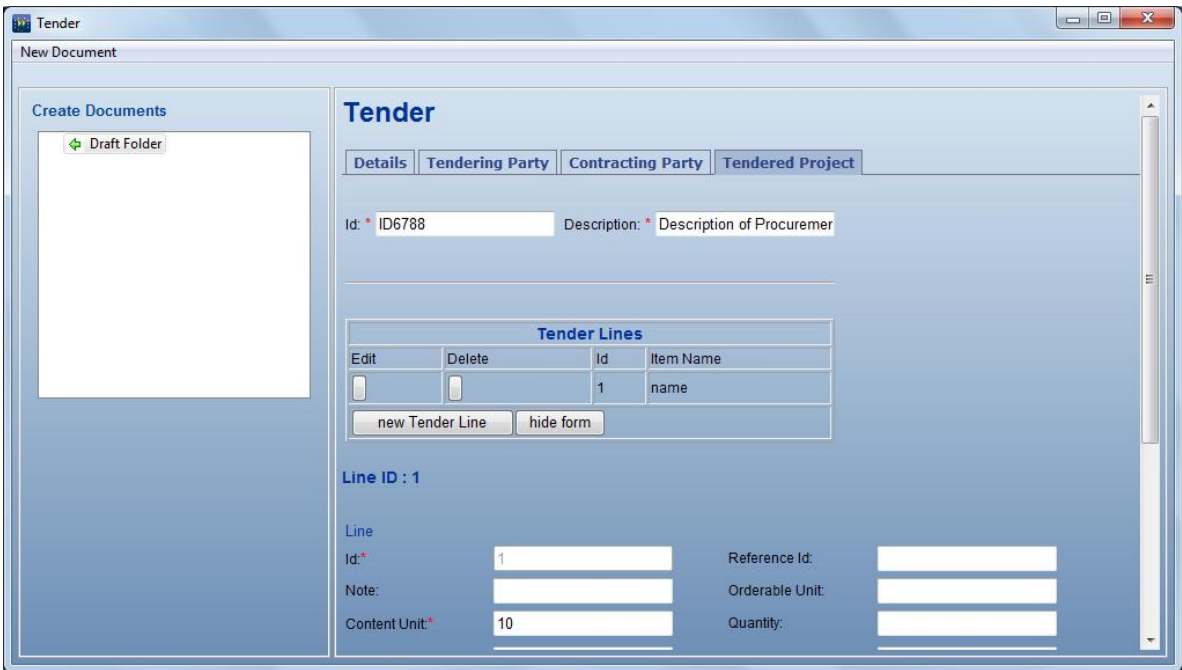
Figure 20: Contracting Party tab form

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



The screenshot shows a web application window titled "Tender". On the left is a sidebar with "Create Documents" and a "Draft Folder" button. The main area has tabs for "Details", "Tendering Party", "Contracting Party", and "Tendered Project". The "Tendered Project" tab is active, showing fields for "Id: * ID6788" and "Description: * Description of Procurement". Below these is a table titled "Tender Lines" with columns "Edit", "Delete", "Id", and "Item Name". The table contains one row with "1" in the "Id" column and "name" in the "Item Name" column. Below the table are buttons for "new Tender Line" and "hide form". At the bottom right, there is a "Save To Draft Folder" button and a note "*Required Fields".

Figure 21: Tendered Project tab with Tender lines



This screenshot shows the same "Tender" window, but the "Tender Lines" table is expanded to show editing options for the selected line (Id: 1). The table has columns "Edit", "Delete", "Id", and "Item Name". Below the table are buttons for "new Tender Line" and "hide form". Below the table, the text "Line ID : 1" is displayed. The "Line" section contains fields for "Id: *", "Note:", "Content Unit: *", "Reference Id:", "Orderable Unit:", and "Quantity:". The "Id: *" field contains the value "1", and the "Content Unit: *" field contains the value "10".

Figure 22: Editing a Tender Line

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

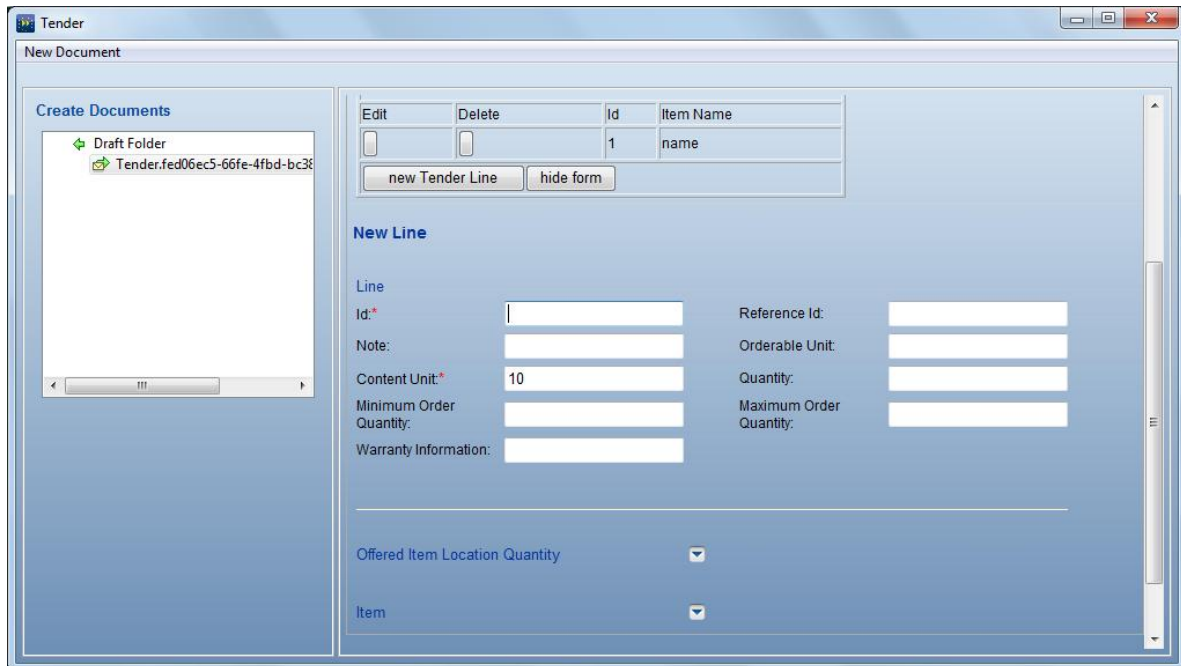


Figure 23: Creating a new Tender Line

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

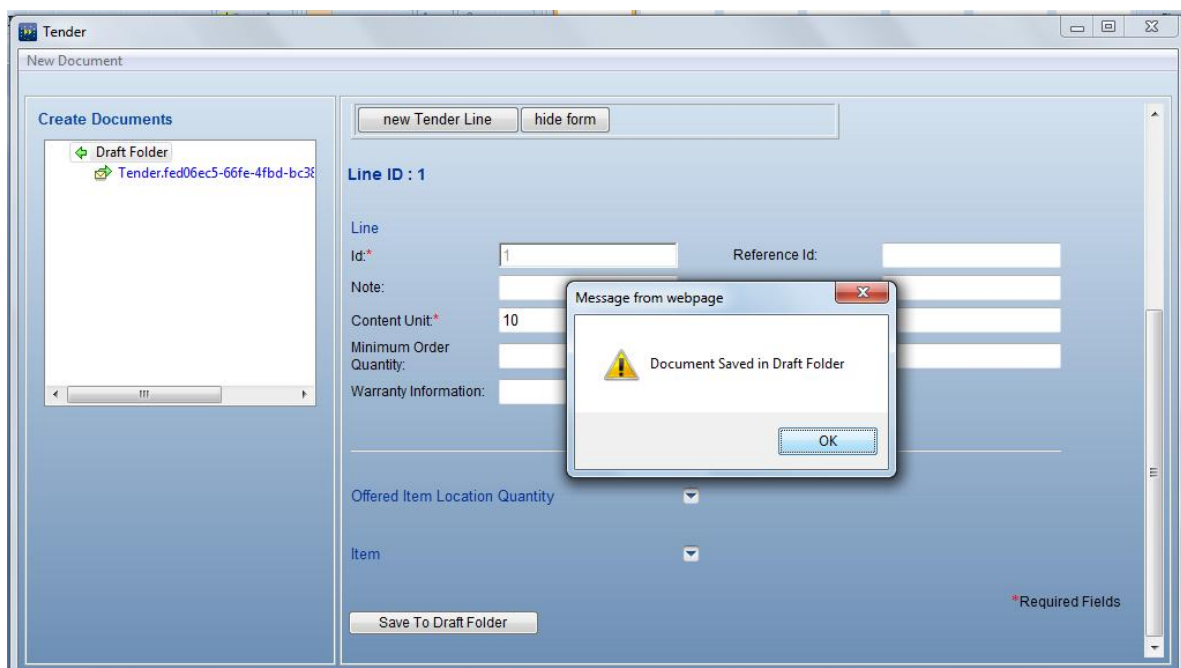


Figure 24: Saving the Tender in Draft document

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.

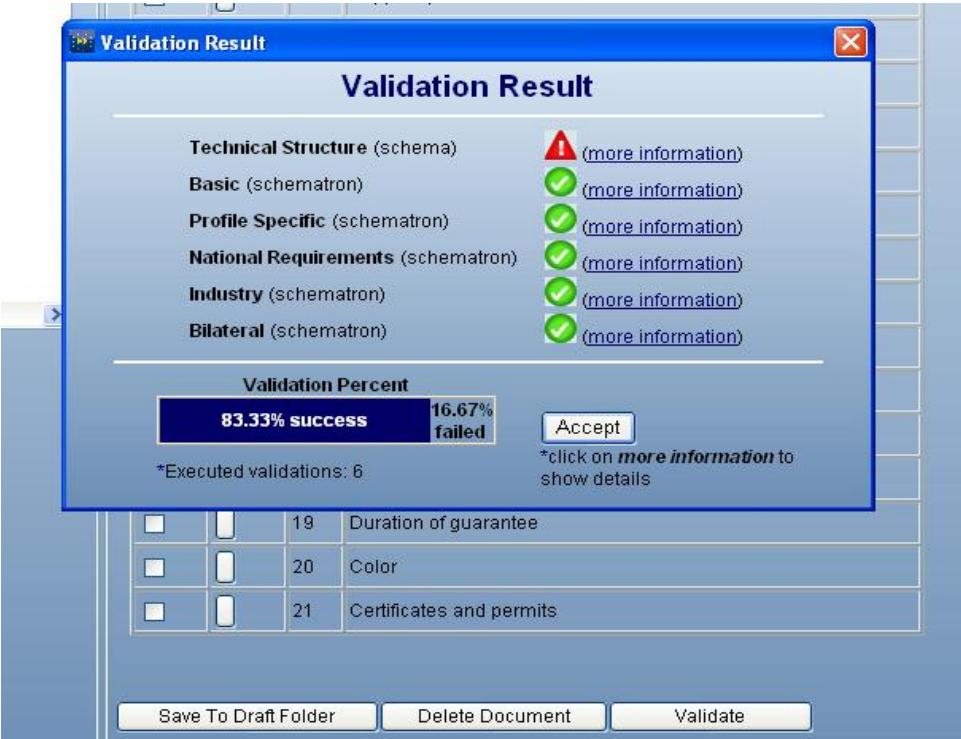


Figure – the EcOp can click on validate button to check the catalogue before to submit