MOFPS

MINISTRY OF FINANCE AND THE PUBLIC SERVICE

OFFICE OF PUBLIC PROCUREMENT POLICY

ePPS Practitioner Manual

This document contains a step-by-step guide, to public procurement practitioners, on the use of the Government of Jamaica Electronic Procurement (GOJEP) portal.

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1 Introduction to the Government of Jamaica's Electronic Procurement System:

The Government of Jamaica's Electronic Public Procurement System (ePPS) is configured to support the procurement procedures prescribed by the Government of Jamaica (GOJ) and allows for the management of tenders by Ministries, Departments and Agencies (MDAs).

The system is accessible via the Internet website www.gojep.gov.jm and provides functionalities for:

1. Management of Tender competitions by Procuring Entities:
   - Competition workspace creation
   - Assignment of users and committees
   - Advertisement and tender document publication
   - Questions and Answers management
   - Tender opening
   - Management of the evaluation process
   - Contract award and management

2. Supplier participation in the procurement process:
   - Access to procurement opportunities and contract documents
   - Submission of clarifications requests and receipt of responses
   - Response to (Accept or Decline) contract offers.

The Government of Jamaica's (GOJ's) implementation of the ePPS System, also referred to as GOJEP, has been configured to support and conform with the procedures and regulations as prescribed by the GOJ's Public Procurement Act, 2015,

Amendment 2018 and attendant Regulations, and allows for full electronic management of procurement transactions and collaboration between the Procuring Entities (PEs) and Suppliers.

The platform also supports all required user administration and security requirements for both the Procuring Entity and Supplier users of the system. User authorization is utilized in conjunction with user authentication to allow access to services and data.

Additionally, the system provides central System Administration functionality which is carried out by designated personnel within the Office of Public Procurement Policy (OPPP) within the Ministry of Finance and the Public Service (MoFPS), which has responsibility for the oversight, administration for the GOJEP.

This collaboration between Procuring Entity and Supplier users during the life cycle stages of tender management is as depicted in the below Tender Management Cycle.
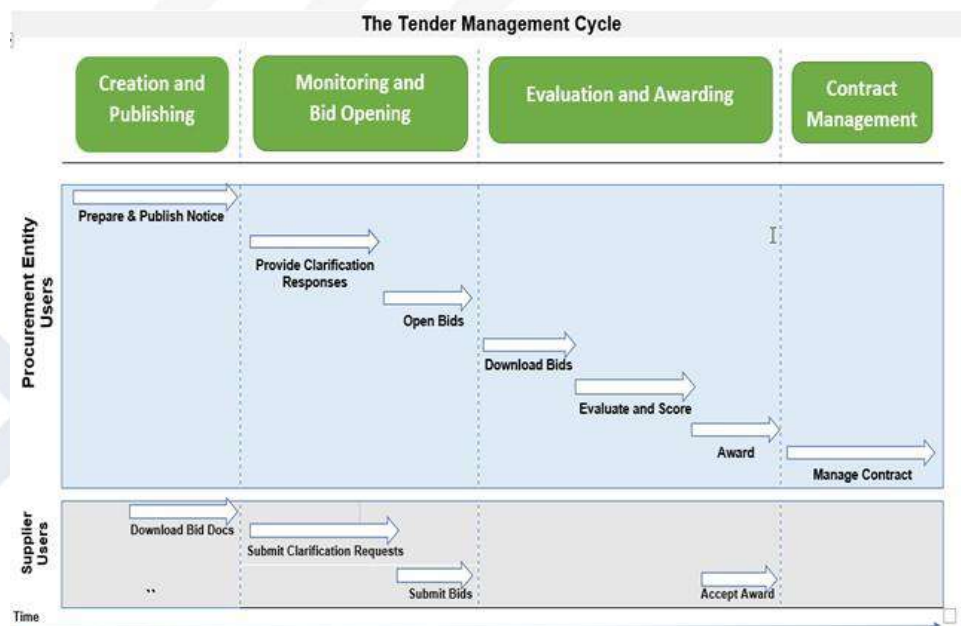
FIGURE 1-1: The Tender Management Cycle

2   Key Features and Navigation

2.1   General Information

The electronic Procurement System provides a consistent user interface to multiple functionalities which are accessed from the Main page at www.gojep.gov.jm

The General Information section of this chapter covers the following topics:

2.1.1 The Main Page

The Main Page of the system serves as the portal or access point to features provided by the system.
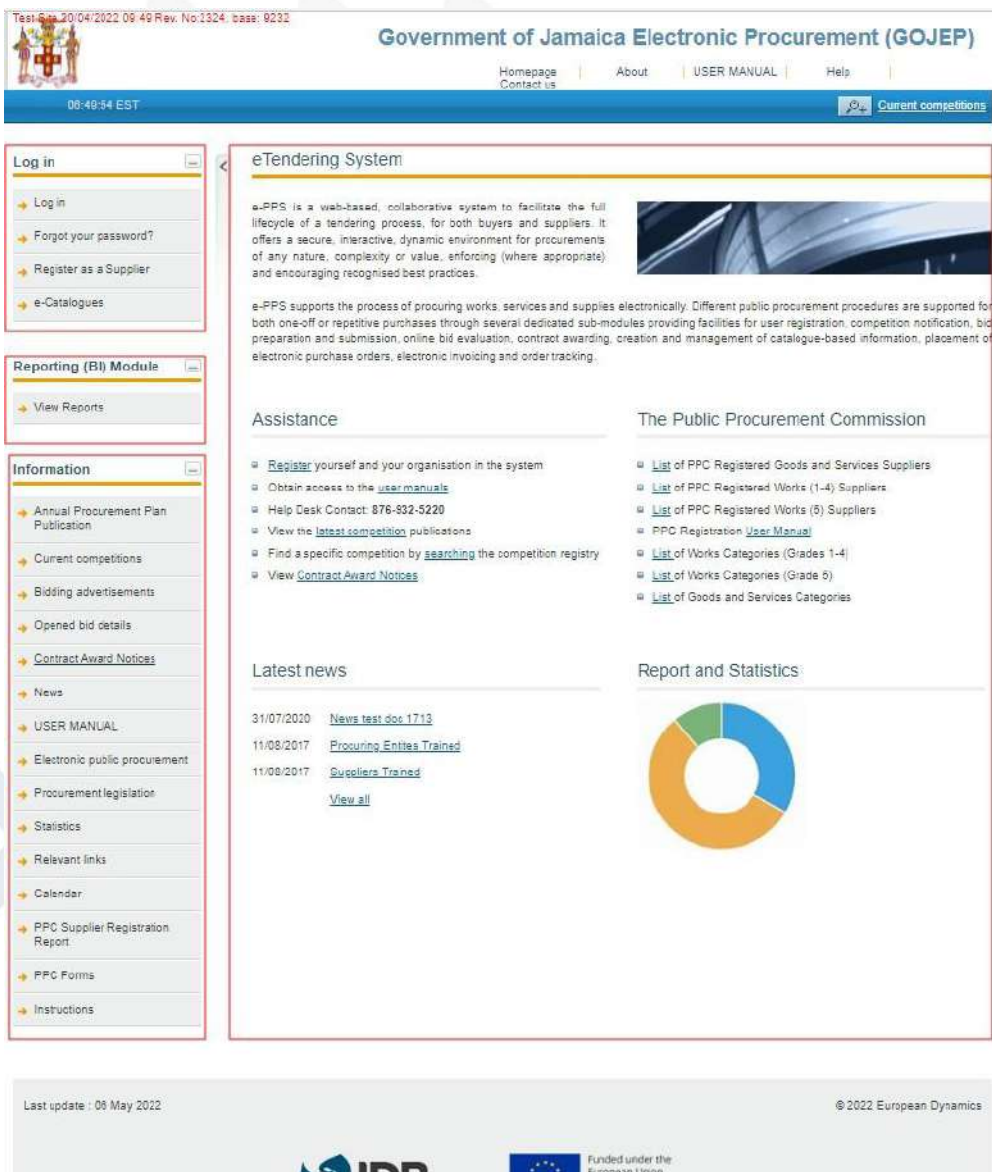
FIGURE 2-1: The Main Page

This Main page is structured into multiple sections as follows:

- Login section -In this section, functionality is provided to enable all users (Procuring Entity, Suppliers and Administrators) to login in the system providing they use the correct credentials (username and password). Functionality to recover user's password is also provided. Finally, Functionality for the registration of Suppliers within the system is provided.

- Reporting (BI) Module section - This section provides access to a list of designed procurement reports based on transactions carried out and completed in the system. The reports are available to both the general public and Procuring Entity users.

- Information section - Contains links to miscellaneous system functionalities, news items manuals and so on.

- Central section - Contains links to procurement related news items or articles composed by the Office of Public Procurement Policy within the Ministry of Finance and the Public Service.

2.1.1 The Tender Competition Cycle

The system supports the complete procurement cycle including contract management of each tender competition with discrete stages of activities over the competition's duration. The competition cycle are as follows;

1. Tender Creation and Publishing - Completion of tasks to define the competition rules, association of officers, uploading request documents and publication of the Procurement Notice.

2. Management of Clarification requests - Functionality for review of requests and creation and publishing of responses.

3. Bid Submission - The period during which interested Suppliers will have access to competition documents, management of clarifications and submission of bids.

4. Bid Opening - The phase where tasks related to the Bid opening and tender opening report is generated.

5. Evaluation - The phase during in which bids are downloaded, evaluated, clarifications requests made, evaluation results entered, finalised and results published.

6. Awarding - In this phase preferred bidders are made an offer of award and contract award published.

7. Contract Management - In this phase, a Contract Manager is assigned and performance / results related to the contract execution are updated in the system.

8. Archiving of competition - Final step for archival and compression of the tender competition artifacts with functionality for downloading same.

2.1.2 Commonly used terms:

The following terms are widely used within the system:

- Associated officers – Refers to PE users who have been assigned to play a role in the management of a tender competition.

- Bid – Refers to a submission (offer) by a Supplier.

- Captcha – This is a type of challenge- response test used to ensure that the response being provided to a system prompt is not generated by a computer but is being done by a person.

- Call for Tender (CfT) – Is the terminology used in the system for all tenders which have been issued or published by a Procuring Entity.

- Competition - This refers to a published or restricted tender.

- Common Procurement Vocabulary (CPV) – This is the classification scheme used by GOJ Procuring Entities and aimed at standardizing the references used by both the PE and Suppliers.

- Contracting Authority (CA) - Used interchangeably with and refers to Procuring Entity, which is a Government of Jamaica Ministry, Department or Agency (MDA).

- Contract document – Refers to any document which is associated with a tender competition.

- ePPS – Electronic Public Procurement System

- Time limit for receipt of tenders or request to participate – Deadline for suppliers (bidders) to upload their bids / offer.

2.1.3 User Credentials

All users of the system must have an appropriate username and password. In order for a user to login, he or she must provide credentials on the login page.

Figure 3: Login page

The functionality to recover user's password is also provided.

User credentials are usually provided at the time of account creation by the head of the Procuring Entity user. The password must conform with the rules defined by the System Administrator. Some factors defining the rules includes:

- Letters (upper case / lower case) allowed to be used

- Numbers allowed to be used

- Characters allowed to be used

- Ten times allowable login failures

- Password lifetime

- Password length (min / max)

- Password history

After creation, the user's account status will be set as "Inactive" by the system and the user will be required to login and complete a number of steps for the account to be activated. The user can also update his or her account profile (including changing password) at the initial login stage.

Login to the system for the first time after account creation requires the user to complete some additional steps compared to regular login as the user will have to provide a system generated transaction number and to also accept the system terms and conditions. After completion of these steps, the users accounts status will be updated to "Active" .

If the user provides an incorrect password for a username more than nine (9) times, the user account will automatically be deactivated. In this case the user may contact the System Administrator to have the account reactivated.

2.1.4 System Navigation guidelines:

The system provides the following common navigation functionality:

1. Navigation themes and aids:
   a. Tabular display of data:

   Any data displayed in tabular format will have the following header which helps the user to navigate:

#	Title		CA	Info	Tenders submission deadline	Procedure	Status	Notice PDF	Award date	Estimated total contract value	

   The arrows are used for sorting (ascending / descending order) the results by the corresponding field.

   The Button is used to hide/ show several fields in the table

   b. Search page navigation buttons:

   Any search query or list with more than a page of results, will include the following navigation buttons:

«	First page
»	Last page
‹	Previous page
›	Next page

   c. Additional Options

   Calendar Button. Selecting this button opens a calendar enabling the user to select a date

Search Button. Selecting this button opens a searching window enabling the user to search for various codes (e.g. CPV codes)

Clear Button. This button clears the selection of the user

2. List of Tender Competitions:

The "Competitions Management" section of the user's Homepage, provides access to:

- List of Tender Competitions for the user.

- List of Tender Competitions for the Procuring Entity

- List of Framework Agreements and

- List of Archived Competitions.

3. Tender Competition Menu:

The tender details page, provides a Menu option ,the" Tender Competition Menu" which can be hidden or expanded by the user at anytime to allow for access to other key functionalities in the management of the tender competition.

2.1.5 Search Features

The system provides functionalities for conducting both "Simple" and "Advanced" searches for details related to Competitions, Organisations and Users.

The Search functionality is displayed in the top ribbon of the page when user logins the system.
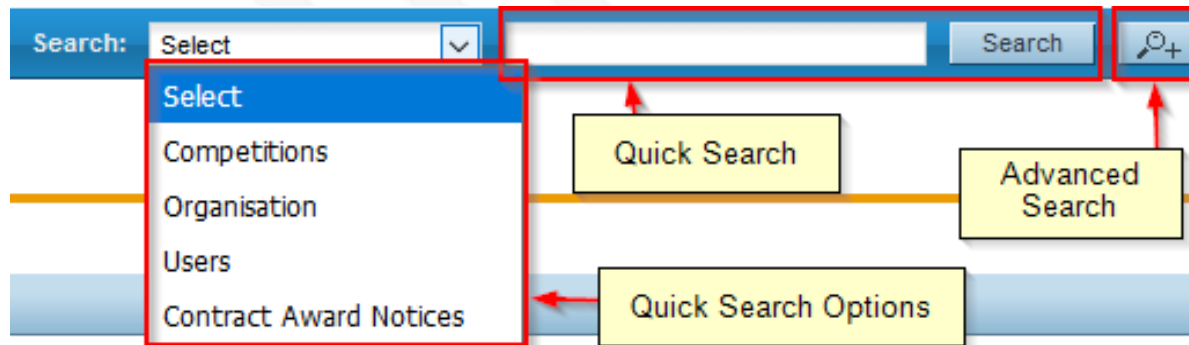
FIGURE 2-1: Search panel

The "Simple" (Quick search) search functionality covers searching for available competitions, registered organisations, registered users, and published contract award notices without specifying any data retrieval criteria. If the user is not logged in at the time of selecting the "Current competition" link, the user will be presented with a, "Simple search" page, and will have to enter the system generated code displayed in the "Simple search" page and then Select the "Search" button.

The "Advanced " search functionality enables searching for competitions, organisations and users based on specific criteria or profile defined by the user.

2.1.1 User Homepage

Once logged in the system, users are landed at what is referred to as their "Homepage", which is the gateway to the key system functionalities. As a role based system, functionalities enabled for a user will be dependent on the Role assigned to a user at account creation.

The Homepage is structured in the following sections:

1. Links - Positioned at the top of the page and provides access to user manual, help and contact information.

2. Search - Provides access to search functionality.

3. Log in - Provides access to log out and e-Catalogue functionality.

4. Task list- Displays the list of tasks pending for the user.

5. PPC Registration - Provides access to a list of Suppliers that are registered with the Public Procurement Commission.

6. PPC Administration - Provides access to registered Suppliers

7. CFT Creation - Provides access to the tender competition creation and manual data entry of competition information functions.

8. Competition management - Provides access to a list of tender competitions for users and the organization.

9. PE administration - Provides access to various Procuring Entity administration functions.

10. Annual Procurement Plan - Provides access to the Annual Procurement Plan functions.

11. Reporting (BI) Module - Provides access to the Business Intelligence reporting module.

12. Information - Provides access to various reports and information sources.

2.1.2 Homepage task List

The system is configured to display personalised user dashboard upon login and provides a list of duties to be performed by the user by display of a "Task list".

FIGURE 2-1: Homepage Task list

Tasks are initiated for a user based on an event or action in the creation or management of a tender competition by a Procuring Entity.

The task list is particularly useful where a user is involved in multiple simultaneous competitions particularly when serving different roles for each competition. For instance, a user may at one point be a member of tender opening committee for a competition, while at the same time serving on the evaluation committee for another competition.

To action a task for a tender competition, the user must select the "Task name" (under the Task column) for the competition of interest.

It is good practice for users to always ensure that assigned tasks are completed to allow for efficient and complete operations of the system. The system will automatically clear a task from the task list when it is completed by the user.

2.1.1 The Tender Competition Menu

During the creation and management of a tender competition, the Competition Menu (Also referred to as CfT Menu contains all available functionality choices to the user. The Competition Menu is displayed at the top right of a competition details page and is collapsed by default and displayed as "Show Menu" button.
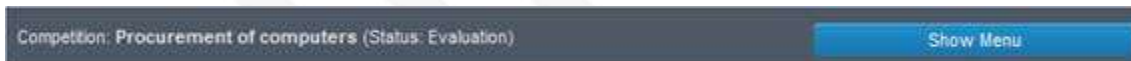
FIGURE 2-1: Competition Menu - Show Menu button

It the user selects the" Show Menu" button, it will be expanded to show all available functionalities that can be performed.
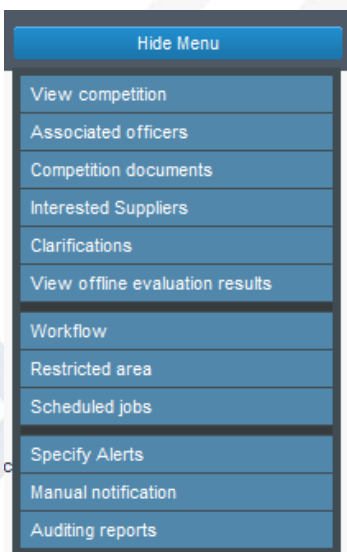
FIGURE 2-2: The Tender Competition menu (Expanded)

Selecting the "Hide Menu" button will collapse the Menu.

2.2 Process

The Process section of this chapter provides instructions on how to execute the following tasks or procedures.

2.2.1 Login in the system

1. Select the "Log in" link from the Log In section of the Main Page.
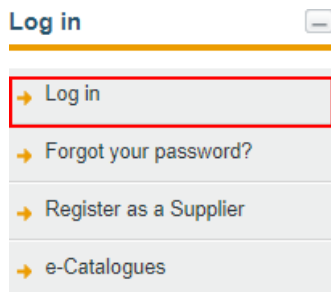
FIGURE 2-1: Main page Login link

2. Enter the "username" and "password" in the login sections of the login page.

FIGURE 2-2: Main page Login section

If the user provides incorrect credentials (either username or password) an error message will be displayed.

FIGURE 2-3: Incorrect Login error message

If the user provides an incorrect password for a username more than nine (9) times, the user account will automatically be deactivated. In this case the user may contact the System Administrator to have the account reactivated.

Users who are making a Login for the first time, will have to complete some additional steps, as detailed in the "Login to the system for the first time" on the next page section.

After successful login, the Task List section of the Homepage will display outstanding tasks (if any) to be actioned by the user, as detailed in the "Homepage task List" on page 23 section

2.2.1 Login to the system for the first time

1. Enter the username and password in the login section of the Main page.

FIGURE 2-1:   Login section

2. Provide the transaction number received in user's email account (The subject of the e-mail is "Welcome to the ePPS") and click the "Submit" button.
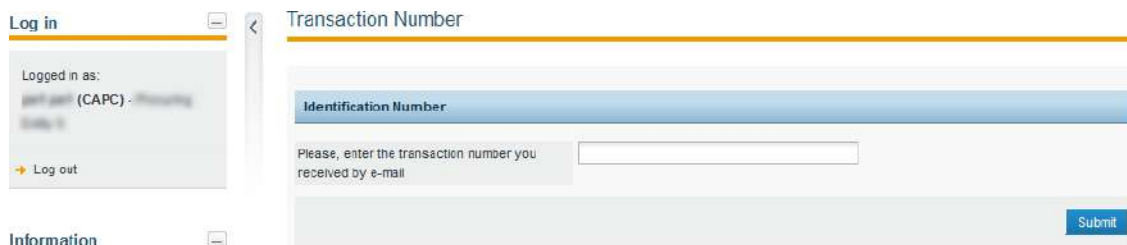
FIGURE 2-2:   Transaction number page

If the user has not received a transaction number in his or her e-mail, an incorrect e-mail address may have been defined at the time of account creation. In this event, contact the System Support Team at876-932-5200 to have a new number generated.

3. Download, Read and Accept the "System Terms of use " Agreement:

Accept agreement

Please read below User Agreement ("license") carefully before using the system.

By using the system, you are agreeing to be bound by the terms of this license.

If you do not agree to the terms of this license, do not use the software. If you do not agree to the terms of the license, please decline the agreement.

PAPU/MoF TermsOfUse v1.0 pdf

Accept   Reject

FIGURE 2-3:   Accept Agreement page

4. Select the "Finish and go to my profile" button displayed at the bottom of the "System requirements" page.

5. Review and make any required changes (password change etc.) in the 'User profile" page and Logout if finished.

On completion, the users accounts status will be changed to "Active".

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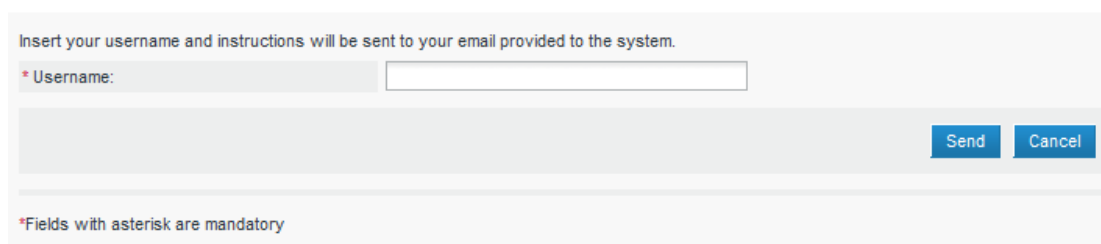
2.2.1 Recover Password

The user can recover his / her password using the "Forgot your password" functionality as follows:

1. Select the "Forget your password" link from the "Log in" section at the top left of the Homepage.

2. Enter the user's username in the "Forgot your password" page:

FIGURE 2-1: Forget your password page

The system will send an email to the email address associated with this user, provided a valid email address was specified. The subject of the email is "New Password link for ePPS".

Note: A system generated Transaction Number is also specified in the body of the email.

3. Open your email account and Click on the password reset link specified in the body of the email with subject "New Password link for ePPS". This action will open the system "Reset password" page.

Reset password

FIGURE 2-2:   Reset password page

4. Provide responses to questions displayed in the "Reset password" page and then Select the "Finish" button.

- Password - Enter a new password

- Re-enter Password - Re-enter the new password

- Transaction number - Enter the transaction number specified in the reset mail (User can copy and paste in this number from the email contents).

- Secret question - The "Secret question" option selected at the time of user account creation will be displayed.

- Secret answer - Enter the response provided to the "Secret question" asked at the time of account creation. The response must be an exact match otherwise the password recovery process will be aborted.

The system will provide a response indicating the password was successfully changed.

2.2.1 Logout from the system

A logged in user can exit the e-GP System by completing the step below.

1. Select the "Log out" link from the "Log in" section of the Homepage.
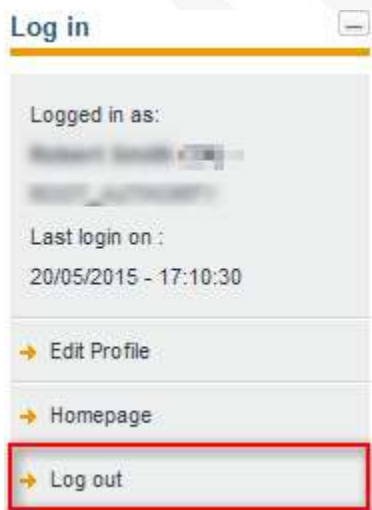
FIGURE 2-1: Log out link

2.2.1 Conduct Simple search

To conduct a simple search:

1. Select the type of search (Competitions, Organizations, Users or Contract Award Notices) from the selection list of the Search ribbon.
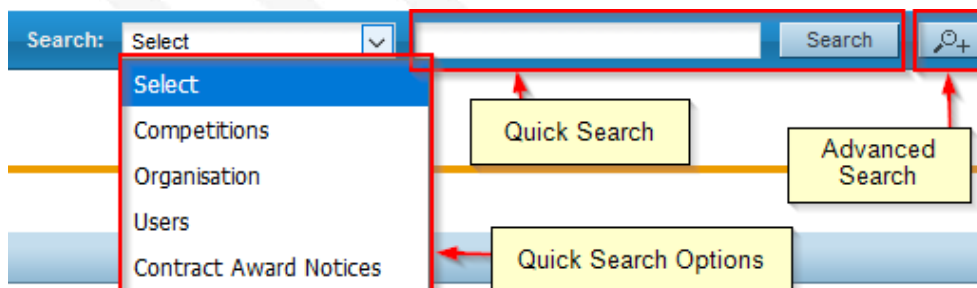
FIGURE 2-1: Search ribbon

2. Enter the full name of the required record or part of it in the search box.

3. Select the "Search" button The results, if any are presented in a tabular form.

4. To export the results, Select the **"Export results as CSV"** button and Save the down-loaded results on your computer.

The exported file includes the full details of the organization or user accounts exported eg. name, username, department, and organization they belong to, status of system registration, system role, phone and fax numbers including mobile, full postal address, email address, and registration validity period.

2.2.1 Conduct Advanced search

1. Select the "Advanced search" button in the Search ribbon.
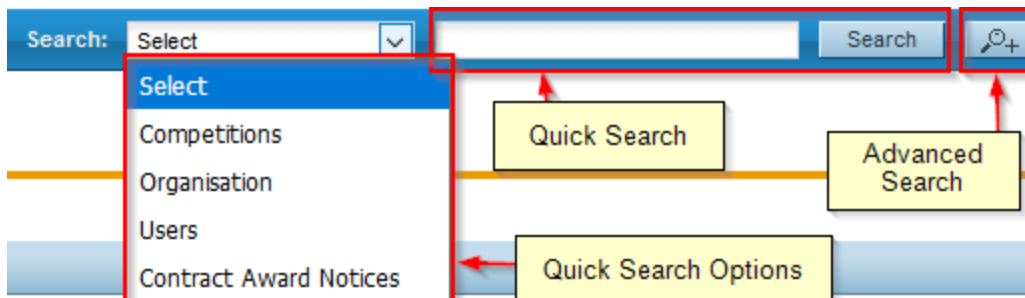
FIGURE 2-1: Search ribbon

2. Provide the search criteria information in one or more fields of the "Advanced

search" page.

FIGURE 2-2: Advanced search page

Note: - Fields displayed in the "Advanced search" page, are dependent on whether the search is being conducted for Competitions, Organizations, Users or Contracts.

3. Select the "Search" button

For further information on each criterion select the respective info icon . The results, if any will be presented in a tabular format in the Simple search results page.

FIGURE 2-3: Simple search results page

2.2.1 Conduct Current Competition search

To view the latest competitions published within the service

1. Click on the "Current competitions" link at the top right of the Homepage.

FIGURE 2-1:   Current competition link

2. The system will list the latest published tender competitions that are available for the public's attention.

    If the user is not logged in at the time of selecting the "Current competition" link, the user will be presented with a "Simple search" page, and will have to enter the system generated code displayed on the page and then Select the "Search" button.

3. To see additional details on any of the listed competitions, Select the "Title" of the competition which will present the "View competition page" where additional details can be viewed.

2.2.1 View List of Tender Competitions (Call for Tenders(CfTs)

1. Select the "List of My CfT"slink from the "Competition management" section: of the Homepage.

FIGURE 2-1: List of my CfT link

2. The "My competitions" page displays a list of procurement opportunities for which the user has been associated.

FIGURE 2-2: List of Competitions page

3. Select the title of a competition of interest and the details will be displayed on the "View competition details" page.

2.2.1 View Tender Competition details

1. Select the "List of my CfTs" or the "List of PE CfTs" link from the "Competition management" section of the Homepage.

Competition management −

→ List of my CfTs

→ List of PE CfTs

→ List of Framework Agreements

→ List of archived Competitions

FIGURE 2-1: Competition management section

2. In the "My competitions" page, Select the Title of the competition of interest.

My competitions

List of my Competitions

#	Title	Type	Status
1	Construction of Type 2 Health Clinic Facility - Santa Clara Bay	Works	Bid submission
2	....	Services	Awaiting bid opening
3	.... Consultancy	Goods	Evaluation
4	....	Goods	Evaluation
5	.... of CMS	Goods	Awaiting bid opening
6	.... Procurement	Goods	Cancelled
7	Eco 2 System Procurement	Goods	Cancelled
8	....	Goods	Cancelled
9	Financial Management Software	Goods	Evaluation
10	Global Landing Base Study - March 2019	Services	Awaiting bid opening

76 results in total. Displaying: 1-10

Page 1 of 8

Results per page: 10

Goto page: 1

FIGURE 2-2: List of My Competitions page

3. The "View Competition" details page will be opened.

View Competition details

My role for this competition is: PO/TC+PO/ESR

Competition: Intrusion Detection Consultancy (Status: Evaluation)   Show Menu

Name of procuring entity:	Procurement and Asset Policy Unit
Status:	Evaluation
Number of bids submitted:	1
Title:	Intrusion Detection Consultancy
Competition unique ID:	1429/88
Evaluation Mechanism:	LCS
Description:	Intrusion Detection Consultancy
Procurement Type:	Goods
Procurement Method:	Open - NCB
Re-Tender flag:	Original Tender
PPC-NCC Categories:	S0130-Consulting Services - General
Common Procurement Vocabulary (CPV) :	79000000-Business services: law, marketing, consulting, recruitment, printing and security
Procurement Technique:	ITB
Number of stages:	1
Framework Agreement Establishment:	No
Funding Source:	Government of Jamaica
Special and Differential Treatment (SDT):	No Special & Differential Treatment
Estimated total contract value:	5,000,000.00 (JMD)
Country of contract performance:	Jamaica
Non-petroleum indicator:	Non-petroleum
Original deadline for bid submission:	10/03/2022 00:00 UTC-5
Deadline for bid submission:	10/03/2022 00:00 UTC-5
End of clarification period:	08/03/2022 00:00 UTC-5
Bid opening date:	10/03/2022 00:30 UTC-5
Site Visit - Bidders Conference Date:	
Contract awarded in Lots:	No
PE audit of competition correspondence:	No
Date of Publication/Invitation:	22/02/2022 13:11 UTC-5

Edit competition details

*Cancelation Reason: [⌄]

Cancel Competition

Export Competition

FIGURE 2-3: View Competitions details page

The user can execute the following actions from this page:

a. Select the "Show Menu " button to access tender competition management functionalities.

b. Cancel the competition

c. Edit details of the competition

d. Export competition details

3 Procuring Entity (PE) and User Administration

3.1 General Information

This section of the chapter provides an overview on the system operations of Procuring Entities and Users covers the following topics:

3.1.1 Procuring Entity and User administration overview:

A Procuring Entity is created by the System Administrator from the Office of Public Procurement Policy, which has overall system administrative responsibilities. The System Administrator will provide various organization details and register at least one key user (defined with CAPC Role) within the organization, who will oversee managing user accounts within the respective entity.

This user, referred to as the Contracting Authority Procurement Coordinator (CAPC), becomes the administrator of the Contracting Authority (equivalent term for Procuring Entity), managing all users and roles within the entity. As such, the CAPC is enabled at set up, thus allowing a procuring entity to undertake self-administration of its own users and tender competitions.

Procuring Entity (PE) administration functionalities are accessed through the " PE administration" section of the Homepage.
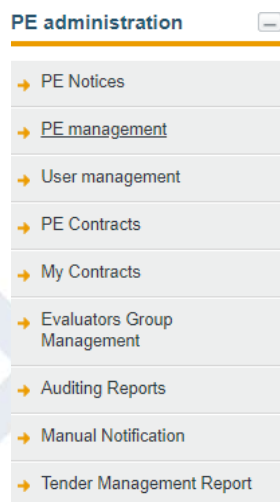

FIGURE 3-1: PE administration section

The available functionalities are:

- PE Notices - For the creation and publishing of Prior Information Notices.

- PE management - For maintenance of the organizations name and address information.

- User management- For the creation and deactivation of users.

- PE Contracts - For viewing details of Contract for the organization.

- My Contracts - For viewing contracts associated with the user.

- Evaluators Group Management - For creation and maintenance of Evaluator groups.

- Auditing Reports - For the generation of detailed system activity reports.

- Manual Notification - For the creation and sending of Manual Notices to users.

- Tender Management Report - For generation of summary tender reports.

USER ADMINISTRATION

User account management is one of the key areas of administration. Users are created and assigned roles that governs the level of system functionality access or privileges. These roles are defined in the "Procuring Entity User roles:" on page 46. Additionally, each user's will be assigned his or her own username and password for access to the system. Rules for password are detailed in the "Password Rules" on page 49 section.

EVALUATOR GROUPS

A Procuring Entity may define Evaluator Groups (or Committees) which can be associated with some or all tender competitions issued by the entity. The groups may include users from other procuring entities.

3.1.1 System Roles overview

All officers using the system are registered within a Procuring Entity (Also referred to as Contracting Authority (CA) and system access privileges are granted to users by assigning 'Roles'. The system supports two levels of authorization for procuring entity users, hence enabling the system to grant access to users on completing specific work-flow tasks based on user role.

The set of user roles are as follows:

1. Organizational (PE) / Contracting Authority (CA) role:

     The role the users may have within the PE. This role is assigned to a user upon creation a system account and remains static. Careful thought must be given to the defining of a user's Contracting Authority role as it broadly defines the level of system access or privileges. The roles are as follows:

     a. CA Procurement Coordinator (CAPC) - Officer of the PE that can create tender competitions, establish competition coordination committees, manage users, and obtain full access to all organizational related data.

     b. CA Procurement Coordinator Assistant (CAPCA) - Assistant to the CAPC. Users with this role have access to similar features with the CAPC except they cannot approve the system generated evaluation report.

     c. CA Procurement Officer (CAPO) - An officer with limited access rights and who will normally serve in capacity as a Tender Opening Officer or as member of the Evaluation Committee.

2. Competition Roles:

     The role a user may have within the context of a Tender Competition / Call for Tender (CfT) / Tender Management. A competition role is specific to a CfT and may differ across competitions. For example, a user may be assigned the role of Evaluator for Competition A and the role of Opening Staff for competition B. The roles are as follows:

a. Procurement Officer / Tender Coordinator (PO/TC) – Users having this role for a tender competition are responsible for its definition, schedule, and completion, along with any communication with suppliers. There must be at least one PO/TC for each competition.

b. Procurement Officer / Opening Staff (PO/OS) – Users having this role for a tender competition are responsible for updating the system about offline tenders and authorizing the unlocking of all tenders. In keeping with the 'four eyes' principle, there must be two PO/OS users for each competition, and they must be registered within the same entity.

c. Procurement Officer / Evaluation Staff (PO/ES) – Users having this role for a tender competition form the Evaluation Committee, responsible for evaluating all received tenders and concluding an award recommendation. There can be zero to infinite number of PO/ES for each com- petition.

d. Procurement Officer / Evaluation Staff Responsible (PO/ESR) - The user having this role for a tender competition is responsible for proceeding with the evaluation process until an award recommendation is made. There must be one PO/ESR for each competition.

e. Procurement Officer Auditor - Users having this role for a competition form the Auditing committee whose access to the competition is limited to its basic details and a zip file containing the documentation of the com- petition (e.g., contract documents).

For security purposes, a user who has been granted the PO/OS or Auditor role within a CfT cannot simultaneously be granted the role of PO/TC, PO/ES or PO/ESR. In contrast, a user can be granted both the PO/TC and PO/ES or PO/TC and PO/ESR roles.

3.1.2 Procuring Entity User roles:

Procuring Entity officers for an organisation, are defined using one of three levels of privileges known as "Roles". This Role is assigned at user account creation and can only be modified by the System Administrator or the Procuring Officer defined with the highest role / privilege within the organization.

The system refers to these Roles as Contracting Authority (CA) roles and are as follows:

1. Contracting Authority Procurement Coordinator Assistant (CAPCA):
   Users assigned this role will have privilege to conduct the following tasks.

   • Modify personal user detail

   • Create CAPC / CAPCA/ CAPO user account within the organization.

   • Search for Supplier organization and user account details.

   • Search for p rocuring entity organization and user details.

   • Filter CfT search for published competitions.

   • Create customized group of Evaluators.

   • Send manual notifications to Suppliers registered within the system.

   • Send manual notifications to users registered within the system.

   • Send manual notifications to all CAPC of Procuring Entities registered within the system.

   • Introduce manually the data of a Call for Tender competition managed offline.

   • Create a Prior Information Notice

   • Create a Call for Tender competition Workspace.

- Assign Procuring Entity / Contracting Authority users as Tender Coordinators.

- Access the list of finalized CfTs that the CAPC has been associated with.

- Access the list of archived CfTs that the CAPC has been associated with.

- Deactivate CAPC /CAPCA/ CAPO user accounts within his / her organisation

- Access to the system logs is available through the Audit Logs tool.

- Download locally logged reports as Microsoft Excel file for all actions performed within his organization

- Approve the final version of the Tender Evaluation Report which the CfT is associated with

- Request a re-evaluation of the CfT for which the CAPC is associated with by rejecting the Evaluation Report.

2. Contracting Authority Procurement Coordinator Assistant (CAPCA):

Users assigned this role will have access to the same privileges as a CAPC role user except the ability to Approve the final version of the Tender Evaluation Report for the Procuring Entity associated with.

3. Contracting Authority Procurement Officer (CAPO):

The users with this role can perform the following tasks.

- Modify user's own personal details.

- Create customized Evaluator groups

- Search for Supplier user account details

- Search for Supplier organization details

- Search for Procuring Entity user account details

- Search for Procuring Entity organization details

- Filter CfT search for published CfTs

- Access the list of finalized CfTs which the CAPO has been associated with

- Access the list of archived CfTs which the CAPO has been associated with.

3.1.3 Password Rules

All authorized users of the system, are required to have their own username and corresponding password. Passwords should follow a specific configuration originally defined by the ePPS System Administrator. Users will be required to provide / enter a password to be used along with their username at the time of user account creation and during the use of the "Recover Password" on page 30 task.

To view the password rules, the user should click on the link "Password rules", displayed in the "Add user" and "reset password" pages.

The password configuration rules consist of:

- Letters (Uppercase / lowercase) allowed to be used.

- Numbers allowed to be used.

- Characters allowed to be used.

- Allowed login failures

- Password lifetime

- Password length (Min/Max)

- Password history

3.2 Process

The Process section of this chapter provides instructions on how to execute the following tasks or procedures:

3.2.1 Edit Procuring Entity details:

CAPC role users are able to edit the details initially defined for a Procuring Entity by y completing the following steps.

1. Select "PE management" link from the "PE administration" section of the Homepage:

2. Select the "Edit Organisation" button at the top of the "View organization" page
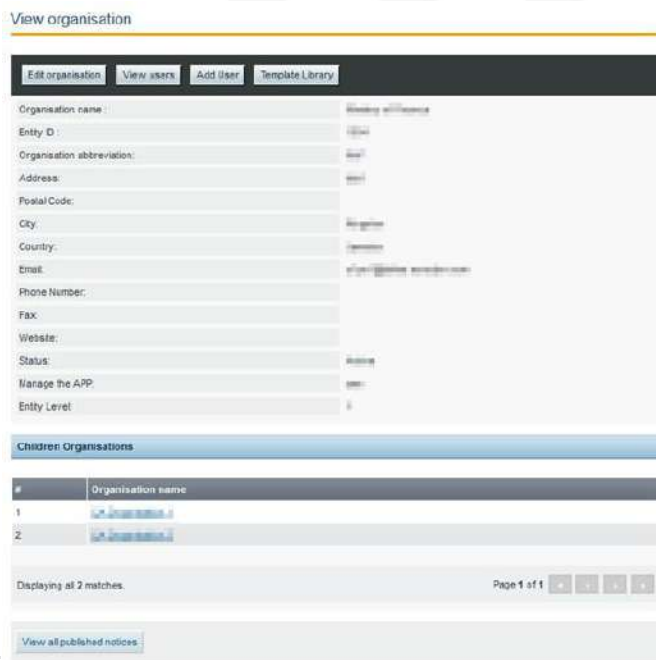
FIGURE 3-1: View organization page

3. Make changes (edit) the displayed organization details; Name, address etc. if so desired. Menu buttons to "Add User" and "View users" are also accessible on this page.

Edit organisation

Add User	View users

*Organisation Name:	Procurement and Asset Policy Unit
*Organisation abbreviation:	PAPU
*Address:	National Heroes Circle
Postal Code:	
*City:	Kingston
*Country:	Jamaica
*Email:	john.thompson@mof....
Phone Number:	
Fax:	
Website:	
Shared Services can create competitions on behalf of the PE:	☐
Manage the APP:	No
Entity Level:	2
Parent entity:	Ministry of Finance

Save	Reset	Cancel

*Fields with asterisk are mandatory

FIGURE 3-2:   Edit organization page
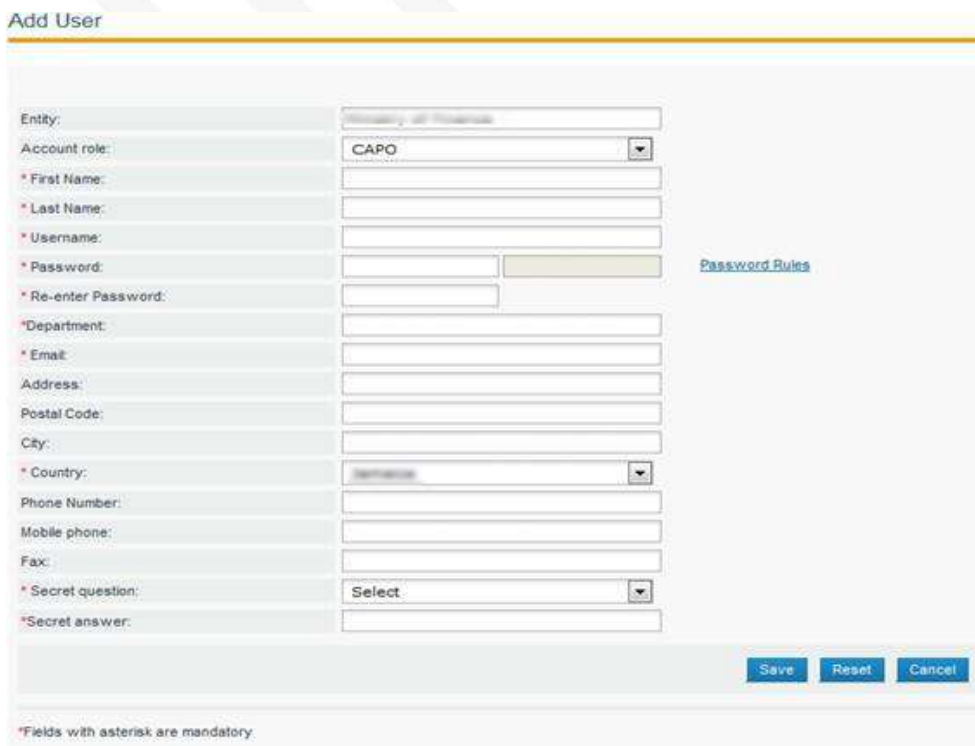
4. Select the "Save" button to save changes.

3.2.1 Create user for a Procuring Entity:

A new user can be created by a CAPC officer by completing the following steps.

1. Select the "Add user" button as shown in the "View users for a Procuring Entity " on page 55page which opens the "Add user" page:

FIGURE 3-1: Add User page

2. Provide the requested details (Fields marked with an asterisk are mandatory):
   - Account role - The role of the employee within the organization as out-lined in "Procuring Entity User roles:" on page 46
   - First Name - User's First name
   - Last Name - User's Last name

- Username - Username to be assigned. User names must be unique for each user of the system and in the event a name entered is already in use, choose and enter a new username.

- Password - User password. The CAPC officer can assign a temporary password initially to the user account, advising the user to change the password upon login.The password rules of the system "Password Rules" on page 49 must be complied with.

- Re-enter Password -Re-entry of password to ensure exact match.

- Department -The Department of the organization where the user works.

- Email - A valid email address must be entered for the user as an account activation code and other notifications will be sent to this email address.

- Address - Address if relevant and all other details including a contact number.

- Secret question - Select one of the displayed 'Secret questions', which will be used to facilitate a password request if required.

- Secret answer -Answer to the secret question.

3. Select the "Save" button at the bottom of the page.

The new user will receive an email notification containing a "Registration Transaction number" to be entered at initial login for his or her account to be activated. Users can also Click on the second link in the email body (System will automatically insert the Transaction Number) and select Submit. The "Add User" page will now open, with the option to set a new password.

3.2.1 View users for a Procuring Entity

To view the users of a Procuring Entity:

1. Select the "User management" link from the "PE Administration" section of the Homepage or Select the "View users" button at the top of the "View organization" page. The "View users" page opens and list the users assigned to the entity.

FIGURE 3-1:   View users page

This page provides menu option / buttons to Add users and to Edit user account details.

The "Status" column provides an indication of the account status of a user:

*   Active (Smiley face icon) - The user's account is active having logged in an activated account after creation.

*   Inactive (Sad face icon) - The user's account is inactive as the user has not yet logged in and had account activated after initial creation. User with an "Inactive" account status will not be able to be assigned to tender competition roles.

2. To Add new users to the Procuring Entity organization, Select the "Add user" button.

3.2.1 Edit user details

User account can be edited by a CAPC role officer only. To edit user details, complete the following steps.

1. Navigate to the "PE User Management" link and Select the "View users" button then Select the "Edit account link" under the Actions column for user in question. The "Edit account" page will be displayed.

FIGURE 3-1:   Edit account page

2. Make the required changes to the user account details.

   If the users password is changed as a part of the account edit activity, the following will ensue

- The users "Account Status" will be made "Inactive" by the system.

- An email will be sent to the user informing the user of the modification of the account details. The Subject of the email is "ePPS Account Modification". The email will also contain a new "Transaction number" in the body of the mail, which will have to be provided on the next occasion the user attempts to login.

- The user will be required to login to reactivate the account and effect the new password by either

    ▪ Clicking on the link in the body of the email which will open the "Transaction number" form with the transaction number inserted, then click the "Submit" button, or:

    ▪ Login from the home page, providing username and the new password then in the "Transaction number" form which appears, enter the "Transaction number" sent in the account modification email, then click the "submit" button.

3. Select the "Save" button at the bottom of the "Edit account" page.

3.2.1 Deactivate user account:

In the event a user needs to be denied access to the system (e.g. due to resignation from the organization), the users account can be deactivated by completing the following steps.

1. Select the "Edit account" page (Select the "View users" button from the "View organization" page, then Select the "Edit account link" under the Actions column for user in question. The "Edit account" page will be displayed.)

FIGURE 3-1: Edit account page

2. Enter a Date in the "Valid from" and "Valid to" date field at the bottom of the page. The same date can be entered in both fields and can be a date in the past.

3. Select the "Save" button.

It must be noted that the system does not allow for deletion of a user account, so as to maintain a track of all user related transactions which would have taken place over time. A deactivated user will not be able to login to the system and will receive a message indicating the account has been locked if attempting to do so.

3.2.1 Create Procuring Entity Notices

To create a "Prior Information Notice":

1. Select the "PE Notices" link from the "PE administration" section of the Homepage.

2. Select the "Create notice" button which opens the "Available Notice form"
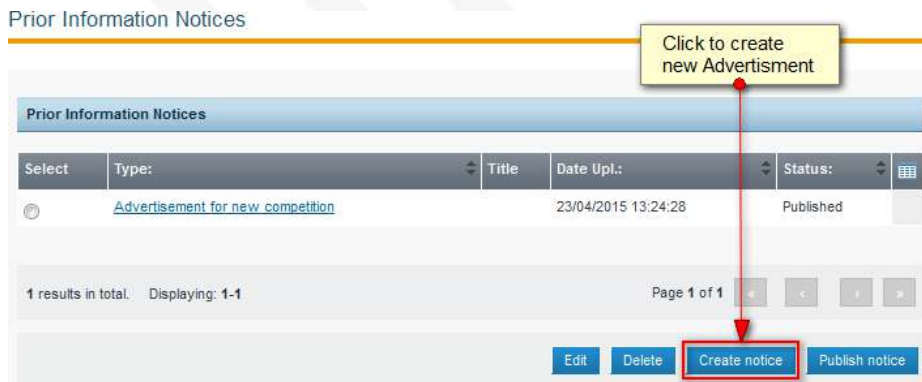
FIGURE 3-1: Prior Information Notices page

The system will pop-up a new window with one available option that the user needs to select and click to enter the respective form by clicking the "Forms module" button.
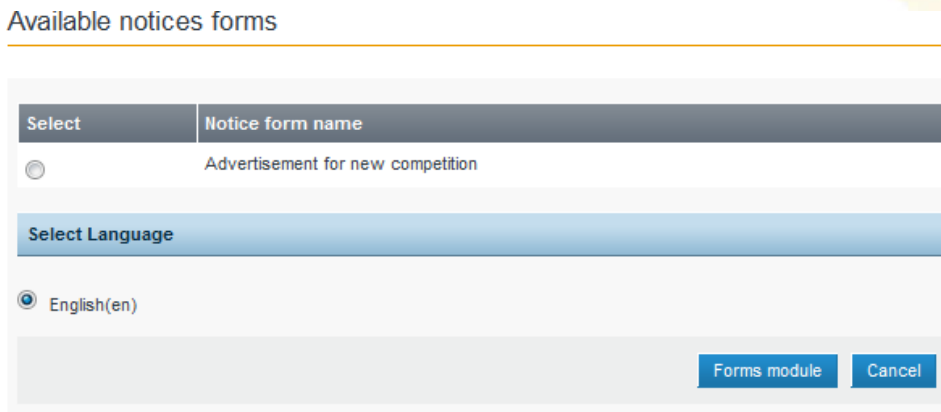
FIGURE 3-2: Available notices forms

3. Select the Radio Button beside the "Advertisement for new competition" line and then Select the "Forms module" button. The "Advertisement for new competition" page will be opened.
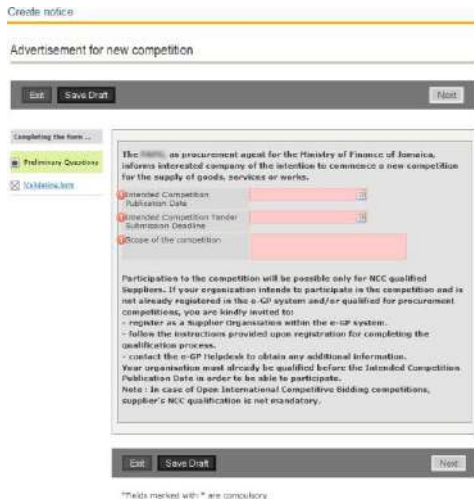
FIGURE 3-3: Advertisement for new competition page

4. Fill in the mandatory information and click the "Next" button.

5. In the final screen / page, save the form as "final" and the system will generate the advertisement that will be ready to be published.
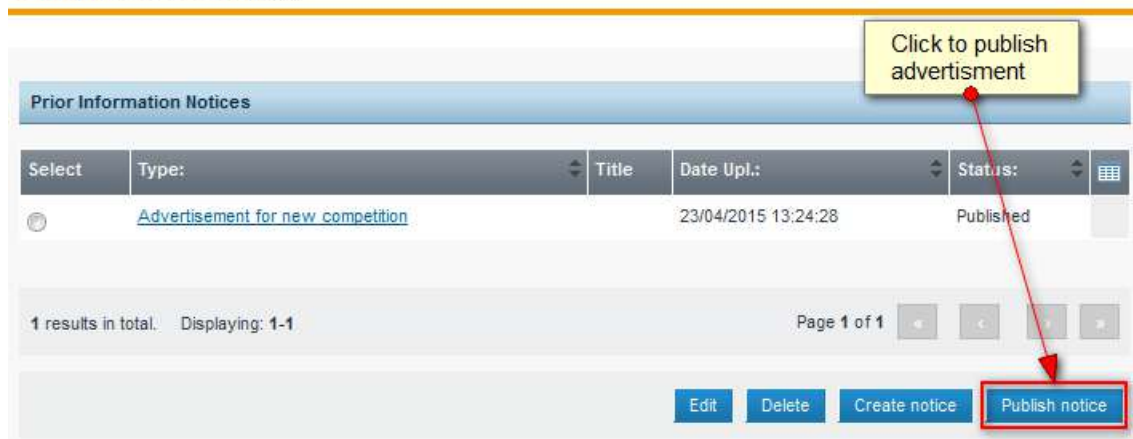
FIGURE 3-4: Prior Information Notices page

6. Select the "Publish notice" button in order to make the Notice available to all Suppliers.

3.2.1 View Contracts

The user can view Procuring Entity Contract details by completing the following steps:

1. Select the "PE Contracts" or "My Contracts" link from the "PE administration" section of the Homepage.

2. In the "PE Contracts" page, Select the "View Contract" link under the "Action" column for the contract of interest.

FIGURE 3-1: PE Contracts page
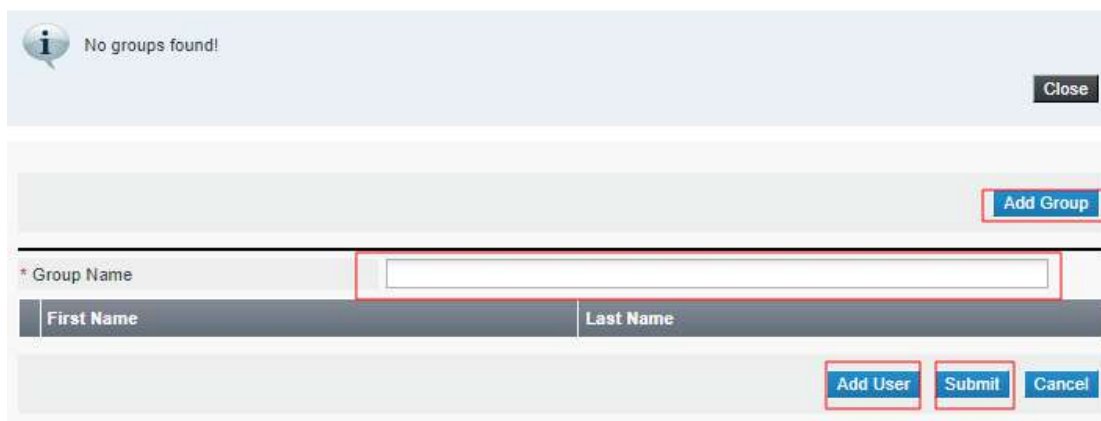
3. Review the contract details shown in the "Contracts" page.

3.2.1 Create Evaluators Group

1. Select the "Evaluators Group Management" link from the "PE administration" section of the users Homepage.

2. In the "Evaluators Group Management" page, populate the "Group Name" field with the name of the Group.
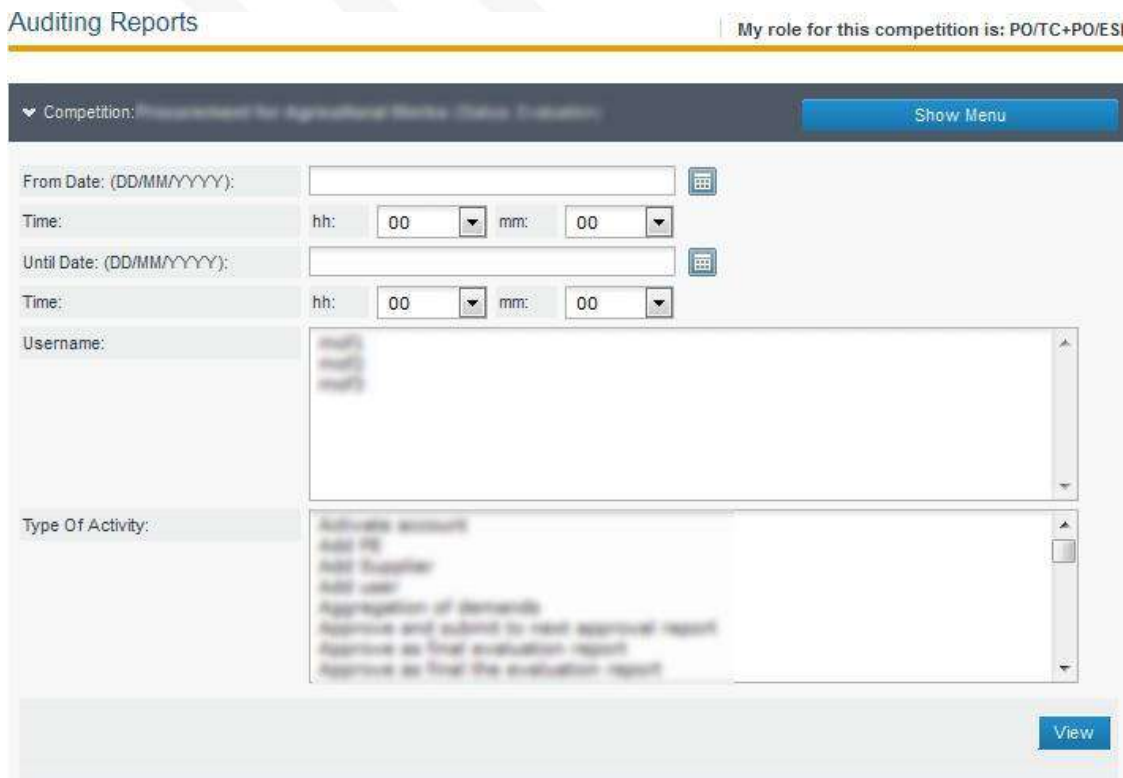

FIGURE 3-1:   Evaluator Group Management page

3. Select the "Add User" button to add the group members. A "Search for Users" page will be initiated, allowing for the search of users from registered Procuring Entities.

4. Select the "Submit" button on completing the addition of users, for the group to be saved.

3.2.1 Create Auditing Reports

To view tender competition Audit Reports:

1. Select the "Audit reports" link from the Competition Menu or from the "PE administration" section of the Homepage.

2. In the "Auditing Reports" page provide the tender competition search criteria details and Select the "View" button.

FIGURE 3-1: Auditing Reports page

3. Select the "Export results as CSV" button to export the data to your computer.

3.2.1 Send Manual Notification

To send a Manual Notification:

1. Select the "Manual Notification" link from the "PE administration" section of the Homepage.

2. In the "Manual notifications" page, populate the required information sections.

FIGURE 3-1: Manual notifications page

3. Select the "Send notification" button to send the message.

3.2.1 Create Tender Management Report

. To generate a report:

1. Select the "Tender Management Report" link from the "PE administration" section of the Homepage.

2. Provide the search criteria parameters in the "Tender Management Report" page.

FIGURE 3-1: Tender Management Report page

3. Select the "Search Report" button to generate results.

4. Select the "Export" button to report in the specified export format.

4 Tender Creation and Publishing

4.1 General Information

This section of the chapter provides background information on the tasks, roles and relevant notices and documents included in the tender management process and covers the following topics:

4.1.1 Tender Competition Creation Task List

There are a series of tasks to be completed in defining a tender competition. These are presented to the Tender Coordinator (PO/TC) user in the following order:

	Tasks	Summary information	Refer to:
1	Workspace Creation	Creation of competition workspace is the first task and defines the rules and conditions (core information) governing the management of the competition.	"Create new competition " on page 85
2	Finalization of core information	Review of the competition workspace rules and update of competition information.	"Finalise competition core information" on page 87
3	Association of Officers	Nomination of users with specific responsibilities	"Associate users" on page 88
4	Workflow definition	Specify evaluation configuration type (Online / Offline) and notification procedures.	"Workflow definition overview" on page 75
5	Evaluation criteria definition	To define Online evaluation criteria in the event of the competition's Evaluation Workflow definition criteria set as "Online"	
6	Contract documents addition	Upload of relevant competition documents.	"Add Contract (Solicitation) Documents" on page 95
7	Notice creation & publishing	Creation and publication of the electronic competition notice.	"Create and Publish Con-

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	Tasks	Summary information	Refer to:
			tract Notice" on page 97
8	Issue of invitation to Bid.	Utilized for Restricted or Single Source bidding procedures, in lieu of publishing of a Notice.	"Send Invitations" on page 100

4.1.2 Tender Management user roles

Procurement Officers are assigned a static system role within the organization at the time of user account creation. However, users can also be associated with specific competition roles during the creation and management of a tender competition (CfT).

The competition roles are associated to a specific CfT and the rights granted only to serve that particular procurement process. The tender management user roles and associated privileges are as follows.

Procurement Officer / Tender Coordinator (PO/TC):

The users assigned this role as part of a tender competition management (CfT) can perform the following tasks:

- Associate the Tender Opening Officers

- Associate the Tender Evaluation Staff and Staff Responsible (ES/ESR)

- Define parts of the competition work flow to be managed online or offline

- Define the tender questionnaire structure

- Create the Competition Notice using the Form filling tool.

- Save Draft or Final copies of the Competition Notice.

- Publish the final version of the Notice.

- Upload a document into the CfT workspace.

- Link the Contract Notice with a Prior Information Notice, if required.

- Create and publish a request for clarification.

- Create and publish clarifications without request.

- Save and publish the final answer to a supplier request for clarification.

- Reject and request tender re-evaluation.

- Approve Tender Evaluation Report.

- Conclude and Announce competition results.

- Issue Standstill notice.

- Manage supplier feedback / complaints.

- End the standstill period.

- Manage post standstill activities.

- Award contact.

- Publish Contract Award Notice.

- Create a mini competition within a Framework Agreement

- Send invitations to Suppliers for Single Source or Restricted Bidding procurement procedures.

- Copy the structure of an already published CfT into a new CfT workspace.

- Export competition, that is all CfT related data and documents into a zipped file.

- Download competition data.

- Archive the competition CfT).

Procurement Officer Opening Staff (PO/OS):

The users assigned this role as part of a tender competition management (CfT) can perform the following tasks:

- Unlock list of submitted tender returns

- Upload offline tenders received prior to the submission deadline.

- Disregard incorrect tender return submissions.

- Approve the list of tenders received.

- Reject the list of tenders approved by the first PO/OS.

Procurement Officer Evaluator Staff (PO/ES):

The users assigned this role as part of a tender competition management (CfT) can perform the following tasks:

- Download the responses / proposal documents submitted by Bidders.

- Input an evaluation score and or price for Bidders.

- Input a justification to clarify the response for a particular score or price.

- Reject the Evaluation Report.

- Upload a new version of the Evaluation Report.

- Approve Tender Evaluation Report (1st level).

- Finalize Tender evaluation.

Auditor Role:

The users assigned this role as part of a tender competition management (CfT) can perform the following tasks

- Access the competition (CfT) details.

- Download the data file containing he documentation of the competition.

At a minimum, three CfT User roles must be defined for each tender competition:

- Procurement Officer / Tender Coordinator (PO/TC) - 1 Officer.

- Procurement Officer / Opening Staff (PO/OS) - Two Officers.

- Procuring Officer / Evaluating Staff (PO/ES) - Minimum of one (1) person who can also play the role of PO/TC and PO/ESR.

4.1.3 Workflow definition overview

Tenders are defined with a workflow structure that in effect specifies the templates on which Supplier bids are to be received, the evaluation mechanism (manual or automated) and of most importance, the evaluation procedure.

The template is saved as an 'XML' file structure in the "Contracts Document" section of the competition. The structure is defined by completion of the "Define Workflow" task using the "Define Workflow" page:

The system provides for two modes of Bid evaluation:

- Offline evaluation - This configuration allows for use of the system largely by uploading B ids from bidders, followed by their download and then manual evaluation by the assigned evaluation committee. The final evaluation scores are then entered in the system by the Tender Coordinator (PO/TC) or Lead Evaluator (PO/ESR) user.

- Online evaluation - The System supports the online evaluation or scoring of tenders, based on pre- established criteria and makes a recommendation of award where the criteria can be scored by the system. Details on configuration for Online evaluation are provided in the 'Configure for Online Evaluation" section.

  Note: For Two Stage Tender Competitions, the workflow must be defined using the Online evaluation option.

Instructions on configuration for Online Evaluation are provided in the Online Evaluation Configuration chapter.

4.1.4 Competition Notices and Documents

In keeping with the GOJ's procurement regulations, the system supports the creation and publishing of various notices based on events or milestones in the tender competition life cycle.

All Notices (Advertisements) are published within the system and can be viewed and or downloaded by the Public in PDF format. A Notice can be created in the context of a specific tender competition or out of context, mainly to advertise the intention to proceed in a procurement competition in the future (Prior Information Notice).

The categories of notices are as follows:

- Prior Information Notice - Advertisement of an impending procurement

- Contract / Procurement Notices - Announcing the commencement of a tender competition

- Contract Award Notice - A nnouncing the results of a tender competition.

- Manual Notices - N otice for addenda etc.

Notices contain information related to the Procuring Entity and key data regarding the competition rules and dates etc.

Where a tender competition is done using "Restricted Bidding" or" Sole Source" procedures, an "Invitation to Bid" message or notification is sent to the designated Suppliers, in lieu of the publishing of a Notice.

NOTICE ADDENDA

In the event of an amendment to a published tender competition (e.g. deadline extension or upload of amended RFP etc.), an addendum to the previously published notice is required.

The system allows for the creation and publishing of an "Addendum Notice" associated with the original published Notice.

PRIOR INFORMATION NOTICES

The system provides functionality for the creation and publishing of an advertisement for an impending tender competition by what is called "Prior Information Notice".

A created but not yet published notice / advertisement can be edited by the user prior to publication. The user can select the advertisement that should be edited and click on the Edit button. The system will present to the user the respective form, pre-filled with the original data. The user may perform any changes before saving the advertisement as draft / final.

A created and published advertisement cannot be edited. Instead, a new advertisement must be published, which corrects the content of the initial advertisement.

MANUAL NOTIFICATION

The System provides functionality for a CAPC role user to send or broadcast messages, via e-mail to selected system users. Document attachments can also be sent as part of the message. These Notices may be independent of any existing or impending tender competition.

Messages can be sent to the following system user groups:

- All users within the Procuring Entity

- All Procurement Officer / tender Coordinator (PO/TC) in all organizations.

- All Supplier admin users associated with / subscribing to specific CPV codes.

Contract Documents

Contract Documents are any necessary competition documents that Bidders will need to read to garner the details of the competition. These can be Request For Proposal, Bid Submission Instructions, Formal documented Clarification responses or any other relevant documentation. Contract documents can be added as part of the "Publish Contract Notice" set of tasks or can be added at anytime (even after publishing of the Contract Notice.) by selecting the "Competitions Document" link from the competition menu.

4.1.5 Prepare Computer for Bid Submission - Download and Install Java Soft-ware

To run the Tender Preparation Tool (TPT) or Tender Notice Form software on your computer, Java software must be installed, and activated on the computer being used for submission. This can be done using the following steps:

1. In a Web browser (preferably Chrome), navigate to the Java download page at: windows_manual.jsp

2. Under the Windows area, download the appropriate Windows offline file for 32- or 64- bit operating system. The download will be initiated and a progress indicator will be displayed at the top right of the browser

3. Double-click the EXE file. The Open File Security warning dialog appears.

4. In the dialog, click Run. In a few moments, the Java Setup - Welcome dialog opens.

5. At the Welcome to Java message, click Install.

6. At the installation complete message, click OK.

7. If the verify Java page opens click the Verify Java version button. If your web browser needs permission to run the verification process, click the Run this time button. In a few moments, a Java detection message appears.

8. To Activate the Java software in your browser:

    a. Google Chrome :

        i. Open Google Chrome browser

        ii. Click on the three dot icon in the upper right corner of the screen to access the menu tab, then Select Settings.

        iii. Select the Privacy and security menu option.

        iv. Select Site settings

        v. Select the JavaScript item

vi. Select the Sites can use JavaScript radio menu option so that it is enabled (blue dot).

vii. Restart your browser to apply settings.

b. Microsoft Edge:

i. Open your Microsoft Edge browser

ii. Click on the three dot icon in the upper right corner of the screen to access the menu tab.

iii. Select the Settings icon from the drop down menu.

iv. Find the section labeled Cookies and Site permissions.

v. Under Site permissions, Select the JavaScript item.

vi. On the JavaScript menu, Toggle on the button next to "Allow" (recommended) so that it turns blue.

vii. Restart your browser to apply settings.

9. Java software should now be downloaded, installed and activated in the browser.

4.1.6 Send Invitation overview

For Restricted Bidding (RB) and Single Source (SS) Procurement Method competitions, the Procurement Officer will be tasked to send an invitation to pre-determined Suppliers instead of the publishing of a Contract Notice as required for Open procurement procedures. All the designated Suppliers must first be registered and activated in the system.

As a part of the "Send Invitation" task, the Tender Coordinator is also required to add any procurement related documents (Contract document) using the Contract document functionality.

4.1.7 Two Stage Bidding overview

The system allows for the management of a tender competition in two stages. In the first (also referred to as the Eligibility stage) Bidders submit proposals in response to either an "Expression of Interest" solicitation or (b) a Technical bid solicitation.

The Procuring Entity may choose to define a minimum technical / threshold score that must be achieved by Bidders in stage one (1) in order to qualify for participation in the second stage of the competition. As such, Stage two (2) of the competition is equivalent to a Restricted Bidding competition as only eligible bidders from the first stage will be able to submit bids. Two stage Tender Competitions may be configured using (a) Qualtity Cost Based Selection (QCBS) or (b) Qualtity Based Selection (QBS) Evaluation mechanism only.

In the first stage, Bids are submitted in 'One envelope' only, while for the second stage the Tender Coordinator may request that the Technical and Price components of the Bids be submitted in one envelope or in separate envelopes. Where bids are submitted in separate envelopes, the system will only allow for opening of the price / financial envelope for bidders who have met the minimum technical score defined for stage two of the competition.

Bidders are typically only required to provide a 'Technical' response in stage one. Price proposal response is usually provided along with an updated technical proposal response in stage two (2) of the competition and as mentioned above, may be 'packaged' as part of the Technical envelope or as a separate 'Price' envelope.

The creation and management of a two stage bidding competition, requires making specific configurations during a tender competition creation and completion of a number of 'management' tasks as follows:

1. Create Stage 1 competition of the Two Stage Bidding process - See "Create Stage 1 of the Two-Stage Tender Competition" on page 102

2. Unlock Bids for Stage 1 of the competition - Following the Bid unlocking steps outlined in this document.

3. Complete Stage 1 competition evaluation - Following the competition evaluation procedures outlined in this document.

4. Create Stage 2 of the Two Stage Bidding process - See "Create Stage 2 of the Two-Stage Tender Competition" on page 105

5. Unlock Bids for Stage 2 of the competition - Following the Bid unlocking steps outlined in this document.

6. Complete Stage 2 competition evaluation - Following the competition evaluation procedures outlined in this document.

7. Complete Contract award tasks. - Following the Contract award procedures outlined in this document.

4.1.8 Recording of Manual Procurement Transactions

The system provides for the recording or input of procurements that were performed outside of the context of the system. This is done through the "Manual data entry" functionality, which is accessed via the "CfT Creation" section of the Homepage.

Recording of these transactions is critical for achieving accurate reporting on the procurement volume across the Procurement Entities.

Information recorded includes:

- Title of the procurement

- Description

- Type of procurement (Goods, Services or Works)

- Evaluation Mechanism (LCS, QCBS or QBS)

- Contract Value of the procurement

- Above or Below the defined threshold indicators

- CPV and NCC Classification of the procurement

- Dates of publication and awarding

- Lots options

- Participating Suppliers

- Awarded Supplier(S).

4.2 Main Process

This section of the chapter provides instructions on how to execute the main tasks and activities required for the creation and publishing of a tender. It covers the following topics:

4.2.1 Create new competition

1. Select the "Create new competition" link from the "CfT Creation" section of the Homepage.
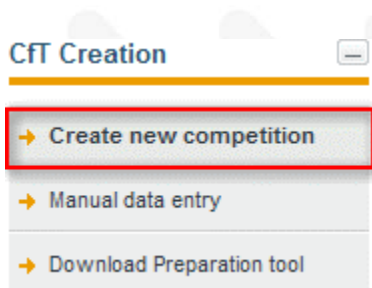
FIGURE 4-1: Create new competition

Only users defined with a CAPC or CAPCA organizational role will be able to create tender competitions.

2. Populate the necessary information in the "Create Competition Workspace page" on the next pageDefinition for each field in Workspace page is detailed in the Appendix section : "Competition Workspace information" on page 241

3. Once the required information has been populated, Select the "Create competition workspace" button to save.

4. Select the Homepage link to be redirected to your Homepage to action the next task in the process, see "Finalise competition core information" on page 87.

4.2.1 Create Competition Workspace page

FIGURE 4-1: Create competition workspace page

4.2.1 Finalise competition core information

On definition of the competition's core information in the "Competition Workspace" page , a task to "Finalise competition core information" will be initiated for the user.

1. Select the "Finalise competition's core information" task from the Homepage Task list.

2. In the "Edit competition details" page:

    a. Change or Update response provided to any of the field prompts.

    b. In the event the Tender workspace includes the use of Lots, the user will be required to define the name of each Lot in this form by completing the responses(S) to the 'Lot Name(n)' field prompts at the bottom section of the form

3. On completing the review of the details or making of changes, select one of the buttons as follows:

    a. Select the "Save changes" button to save changes or

    b. Select the "Delete competition" to end the creation of the tender competition and to remove the workspace record or

    c. Select the "Cancel" button to not make any changes. In this event, the "Finalise competition's core information" task will still be outstanding for the user.

    If any of the above-mentioned tasks are not auctioned, the "Finalise competition's core information" task will remain outstanding for the user.

4. Select the Homepage link to be redirected to your Homepage to action the next task in the process.

4.2.2 Associate users

User roles are associated to a specific tender competition and the rights granted only to serve that particular procurement process. To associate users:

1. Select the "Associate PO/TC" task from the Homepage task list. Alternatively, Select the "Associated Officers" link from the competition menu.
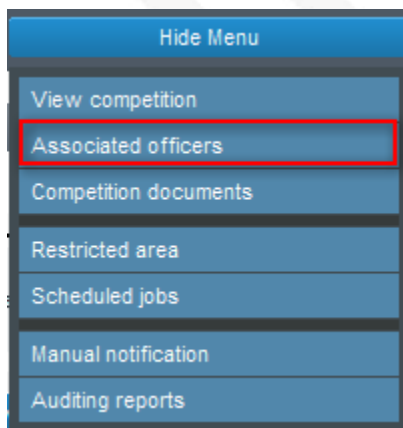
FIGURE 4-1: Associate officers link

2. Associate (Add) the following users using the "Associated officers" form
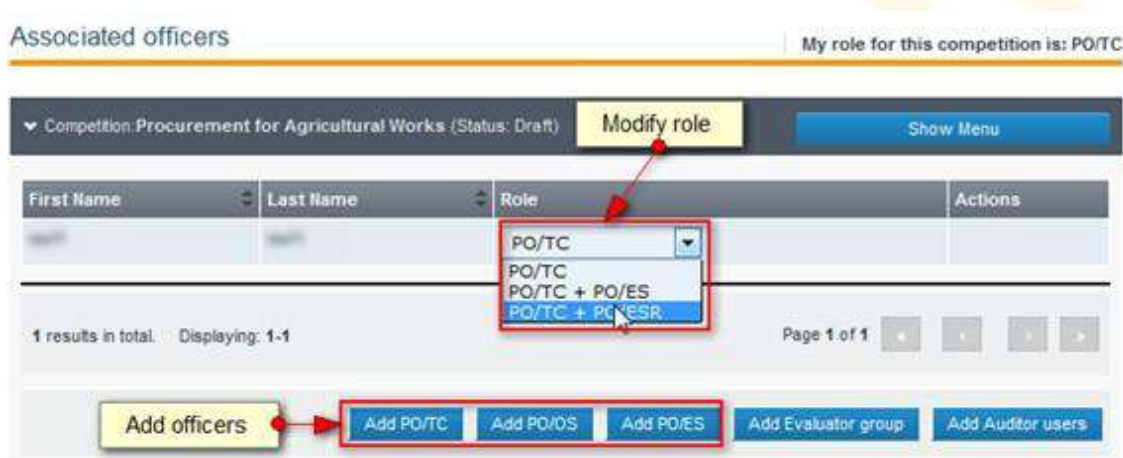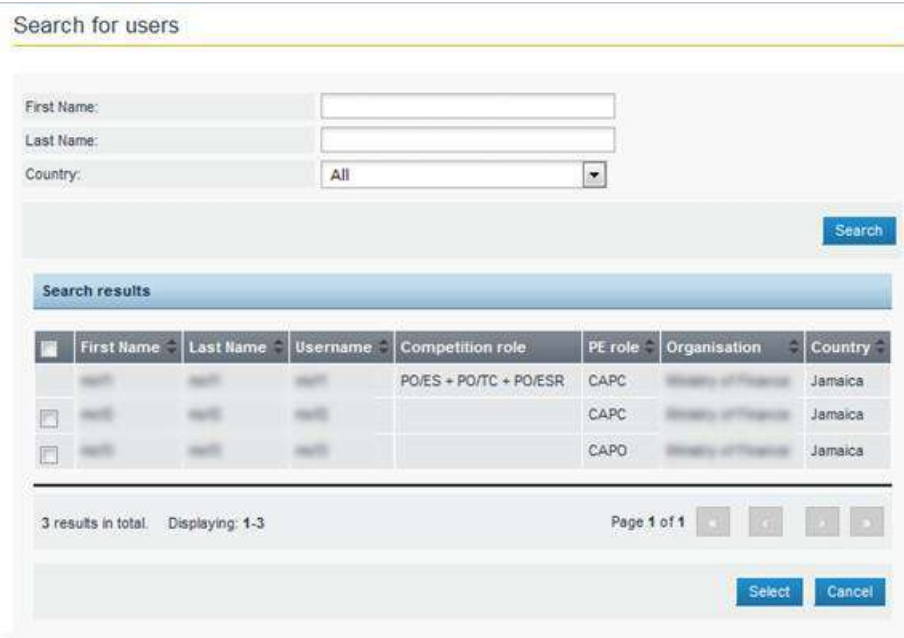
FIGURE 4-2: Associated officers page

a. Opening Staff - Select the "Add PO/OS" button to add the required two opening staff officers.

The system offers a feature to search for users that are eligible to be associated with a specific role.

FIGURE 4-3: Search for users page

b. Evaluating Staff - Select the "AddPO/ES" button to add the members of the Evaluating staff. The system will offer a feature to search for users that are eligible to be associated with this specific role. There must be a minimum of one designated user for this role.

The officer serving in the role as tender coordinator can also serve as a member of the Evaluating staff by changing his / her role designation in "Associated officers" form. To modify the tender coordinator role to serve in both capacities, Select the drop down link under the role column and select the role of "PO/TC + PO/ES"option.

Evaluating staff users can also be associated from a previously defined "Evaluator group". To do so, Select the "Evaluator group" button in the "Associated officers" form and select the group to be added.

c. Evaluator Responsible - Designate one of the associated Evaluating staff users as the Lead Evaluator (Evaluator Responsible), by modifying or changing his / her role from PO/ES to PO/ESR . The officer serving in the tender coordinator role can also serve the "Evaluator Responsible" role by modifying his/her role. To do so, Select the drop down link under the role column and select the role of "PO/TC + PO/ESR".

d. Auditor - To add and Auditor (this is optional) , Select the "Add Auditor users" button and then select on or more auditors from the list displayed.
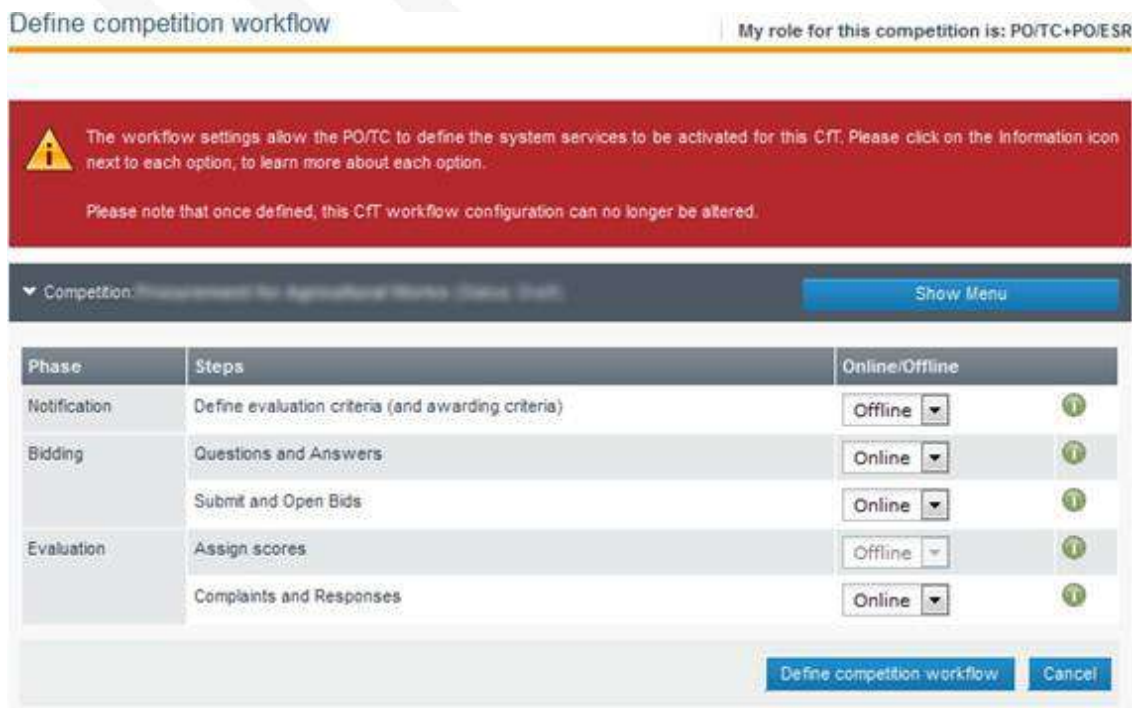
The assigned users and their roles can be modified at any time during the active phases of he competition life cycle. Furthermore, a user can be disassociated from a competition if required; refer to "Disassociate or Change Associated Users" on page 158 instructions.

3. Select the Homepage link to be redirected to your Homepage to action he next task in the process.

4.2.1 Define Workflow

1. Select the "Define Workflow" task from the Homepage Task List.

2. Select the appropriate response (Offline or Online) in the "Define competition workflow" page, broken down in phases as follows:

FIGURE 4-1:   Define competition workflow page

a. Notification phase:
   - Offline - Select this option, if the criteria to be used to evaluate Bids will NOT be configured in the system. The system will automatically de- activate the option to perform the Evaluation of the bids received offline.

   - Online - With this selection, the Tender Coordinator will be con-figuring the tender structure to allow for full or partial evaluation by

the system and thus will have to complete the "Define Evaluation criteria" task in the tender competition setup.

b. Bidding phase:

Step 1 - Questions and Answers:

- ◦ Offline - With this selection, the Clarification section will be disabled for the competition and Bidders will not be able to use the system for submission of clarification requests.

- ◦ Online - With this selection, Bidders will be able to submit Clarification requests through the system and see all published clarification responses. The recommendation is for "Online" selection so that all of the competition correspondences and artifacts are stored in the system.

Step 2 - Submit and Open Bids:

- ◦ Offline - Bidders will not be able to use the system to create and submit their bid. This response may be fitting where the system is used for 'advertising' of competition details and to make contract documents available for download from prospective bidders with the expectation that Bids (if any) will be dropped in a physical Bid / Tender box at the procuring entity location.

- ◦ Online - Suppliers will be able to create and submit their bids electronically from the convenience of their computer at home and office. The default modality for receipt of bids is for "Online".

c. Evaluation phase:

Step 1 - Assign Scores:

- ◦ Offline - Where the "Define Evaluation Criteria" was selected as "Offline" in the workflow, this response will automatically default to "Offline" This is because tender evaluation will not be performed in the system and the tender coordinator will be required to submit the results (or scores) of the offline evaluation procedure, when this is finalized, to the system.

- Online - Evaluation (scoring) of the bids will be performed automatically by the system where possible, based on the tender configuration criteria defined in "Define Evaluation criteria" task.

Step 2 - Complaints and Responses:

- Offline - Feedback concerning the procurement process (e.g. during the Standstill period) will not be permitted via the system if this option is selected.

- Online - At the end of the competition, Bidders will be able to submit their feedback via the system. This is the recommended response option.

d.
- Online -At the end of the competition, Suppliers will be able to submit their feedback through the system. This is the recommended response option.

3. Select the "Define competition workflow" button.

Note: Once the Workflow has been defined and saved, it can no longer be edited or changed. If .an error was made, the only option is to delete and re-create the competition

4.2.1 Publish Contract Notice

A respective task (Publish notice) will appear in the users task list which upon selection navigates to the "Notices and Contracts Documents" page. This page has two sections:

i. Notices

ii. Contract Documents
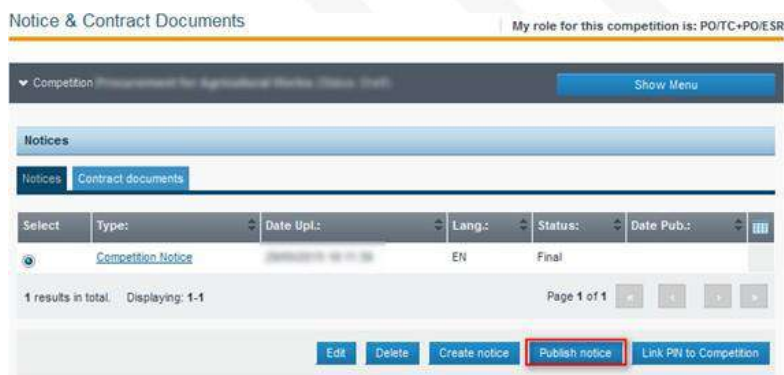
FIGURE 4-1: Notice and Contracts Documents page

There are two tasks to be completed. It is strongly recommended that users add the contract document followed by the creation of the notice.

1. "Add Contract (Solicitation) Documents" on the next page

2. "Create and Publish Contract Notice" on page 97

Suppliers who have subscribed to CPV codes used in the tender definition, will be notified of the opportunity by e-mail and will be able to download the tender documents.

Once the Contract documents have been attached and the Notice created and published, the procurement opportunity can now be viewed by the public.

The tender creation and publishing activities are now completed.

4.2.1 Add Contract (Solicitation) Documents

In the context of the Work flow process, take the following steps:

1. Select the "Contract Documents" tab, then Select the "Add contract document" button.
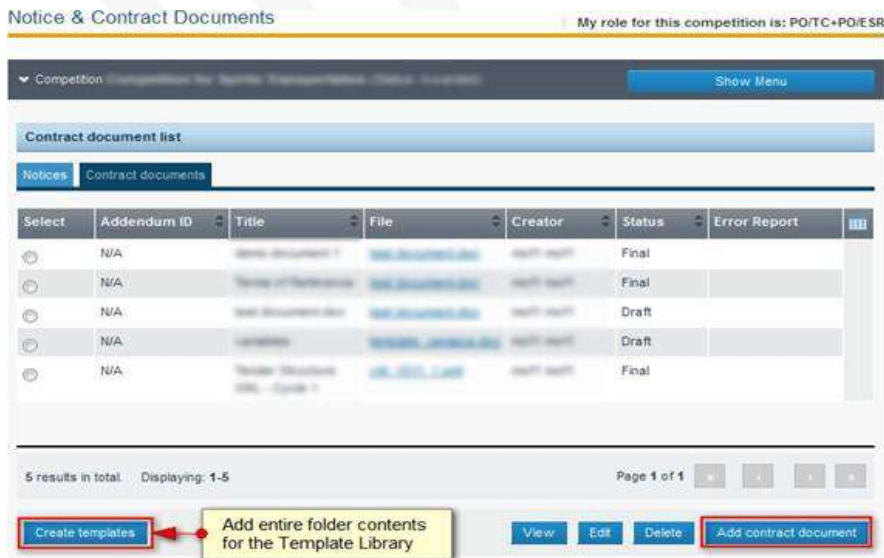
FIGURE 4-1: Add Contracts Document link

2. In the " Add / Edit Contract Document " form which appears in the figure below.
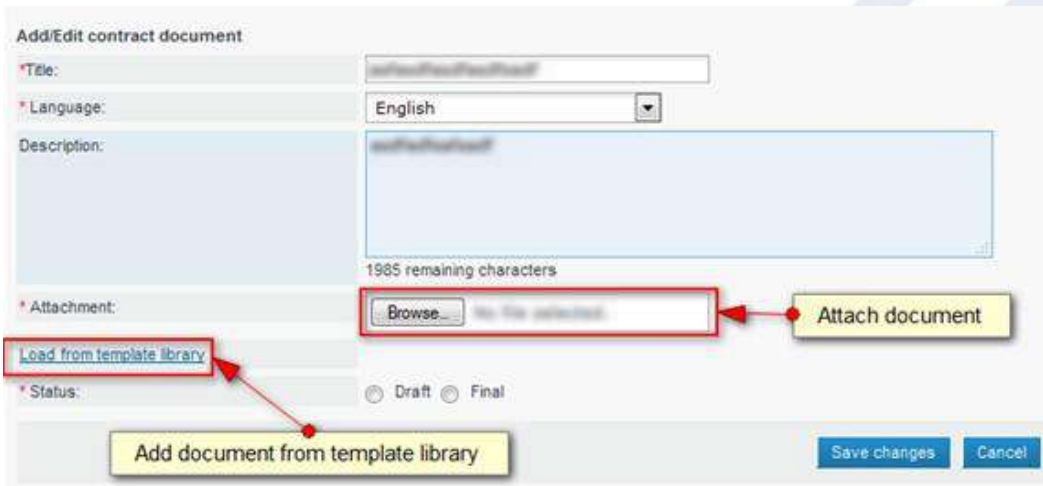
FIGURE 4-2: Edit Contracts Document link

Provide the following information:

a. Provide the title of the document (e.g., RFP Document For Procurement...)

b. Provide a Description (Non-mandatory).

c. Select the File (document) to upload in the system - Only one file can be uploaded at a time.

d. Select the Status of the uploaded file (Draft or Final).

e. Select "Save changes".

Alternatively, the Procurement Officer may select to upload all documents from a sub folder in the Template library by selecting the 'Load from template library" button. The system will process the request and update the competition's documentation accordingly.

All documentation is created in a draft status. In order for documents to be available to the Bidders, the Status must be set as "Final"

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4.2.1 Create and Publish Contract Notice

Contract Notices are composed using the system Forms Filling Module (FFM), using the following steps.

1. Select the '"Create Notice" button in the "Notice and Contract documents" form. This will open the Forms Filling Module tool.
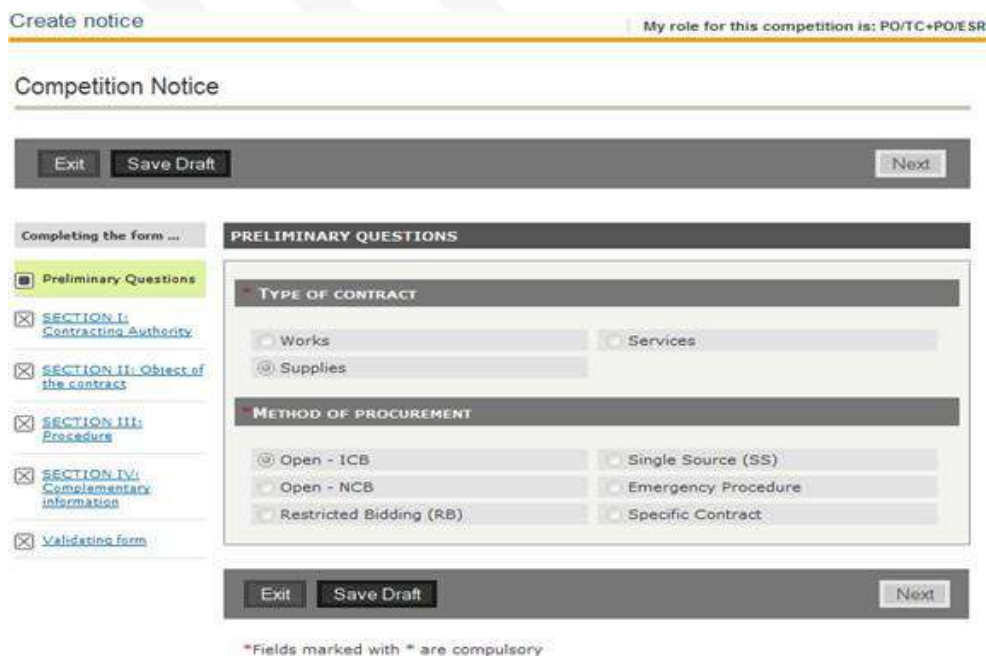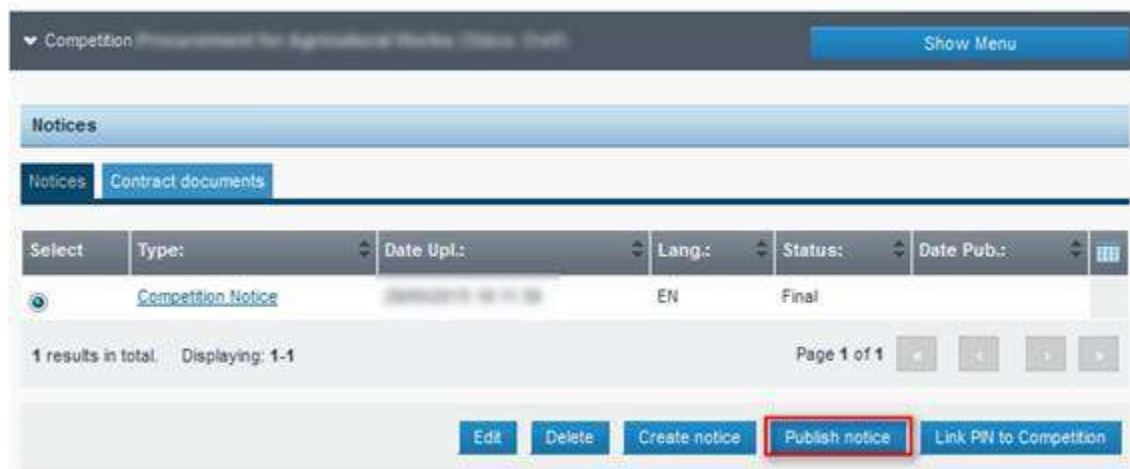
FIGURE 4-1:   Create Notice page

2. Populate the required information as requested in the forms module. After all the details are populated, the user may save the Notice as **"Draft"** or "**Final**". Notices saved in **"Final"** status are available for publication. Notices that are saved in **'Draft'** status can be modified at anytime before publication.

3. Once the user is satisfied the Notice is ready for publication, Select the **"Publish Notice"** button in the **"Notice and Contracts document"**.

FIGURE 4-2: Notice & Contract Documents page

4.3 Other Processes

This section of the chapter covers the following attentional topics:

4.3.1 Send Invitations

1. Select the "Send Invitations" task as appears on the Homepage in the users Task List.

2. In the "Notices and Contracts Documents" page, Select the "Create new invitation" button.
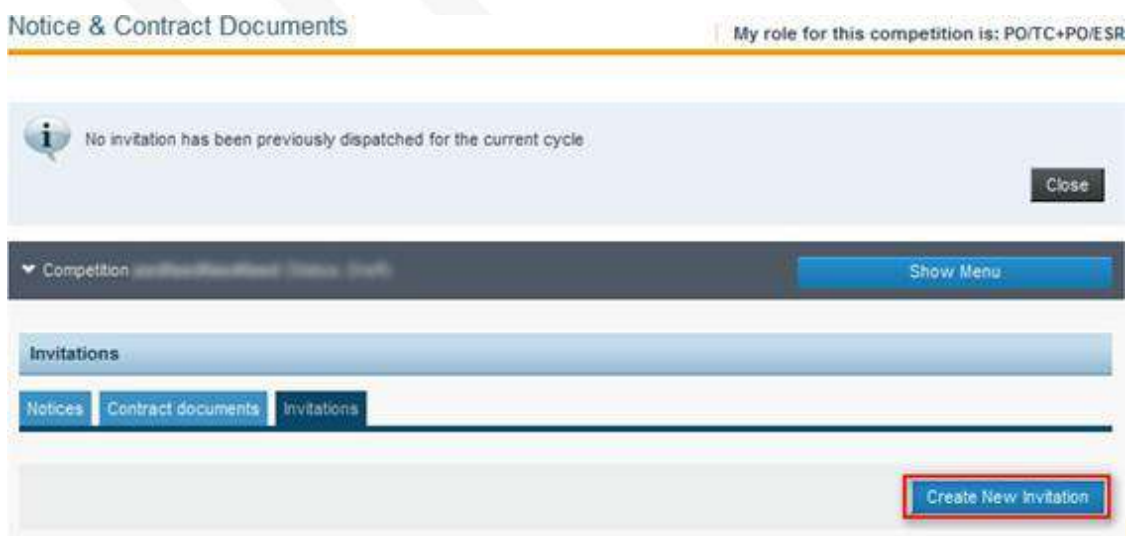
FIGURE 4-1: Notice & Contract Documents page

3. Populate the required fields as shown in the figure below:

   a. Body - Enter a brief narrative of the Tender competition

   b. Attachment - Attach a file / document if required

   c. Organizations - Select the Suppliers to whom the Invitation is being extended.

Notice & Contract Documents

| My role for this competition is: PO/TC

Competition:Procurement of Graphics Design Services - Framework Agreement (Status: Draft)

Show Menu

Invitations

| Notices | Contract documents | Invitations |

Create New Invitation

*Subject:	Invitation to tender for: Procurement of Graphics Design Services - Frame
*Body:	(Maximum characters: 50000)
Attachment:	Choose File No file chosen

Attention: File attachments of above 5MB may be blocked within recipient networks. It is suggested you upload such documentation in the Contract Documents section instead.

*Organisations:

Deadline for bid submission

*Date: 17/06/2022   hh: 14   mm: 00

Deadline for clarification

*To: 10/06/2022   hh: 14   mm: 00

Cancel   **Send invitation**

*Fields with asterisk are mandatory

FIGURE 4-2:   Send invitations page

4.   Select "Send invitations" button to complete the process.
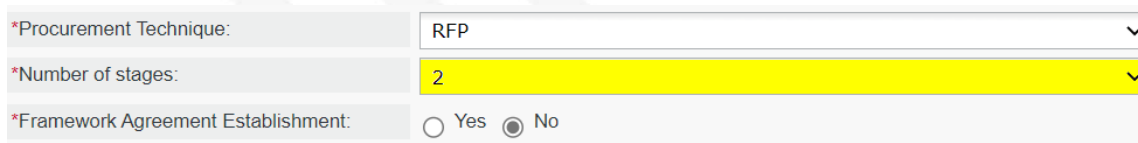
Once the Contract documents have been attached and the Invitation sent, Bidders will be notified of the opportunity by e-mail and will be able to login to the system and download the Contract documents.

4.3.1 Create Stage 1 of the Two-Stage Tender Competition

Complete the following setup tasks in order to manage a tender competition in two stages;

1. Create the Tender Competition keeping with the steps outlined in the "Tender Competition Creation Task List" on page 69 section.

2. In the "Create Competition workspace" page, Select option "'2" in response to the "Number of stages" prompt as follows:
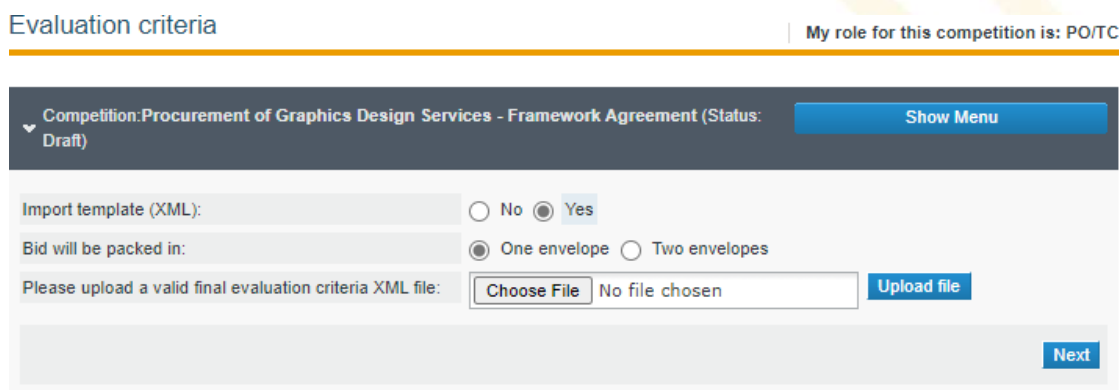
*Procurement Technique:	RFP
*Number of stages:	2
*Framework Agreement Establishment:	○ Yes ◉ No

FIGURE 4-1: Number of stages selection

3. In the "Define Workflow" step, Select "Online" response for all the prompts so as to configure the competition to use the Online Evaluation procedure. Refer to the "Define Workflow" on page 91 section.

4. Select the "Define evaluation criteria" task as appears on the Homepage task menu which will open the "Evaluation criteria" page:

FIGURE 4-2: Evaluation criteria page

The system will automatically select the "One envelope" option for packing of bid responses. This selection cannot be changed by the Tender Coordinator user as Bid submission is only allowed in "One envelope" for the first stage of the competition.

5. Select the "Next" button in the "Evaluation criteria" page to navigate to the page presenting the "Eligibility criteria". User will be required to define criteria for Stage One (1) of the competition.
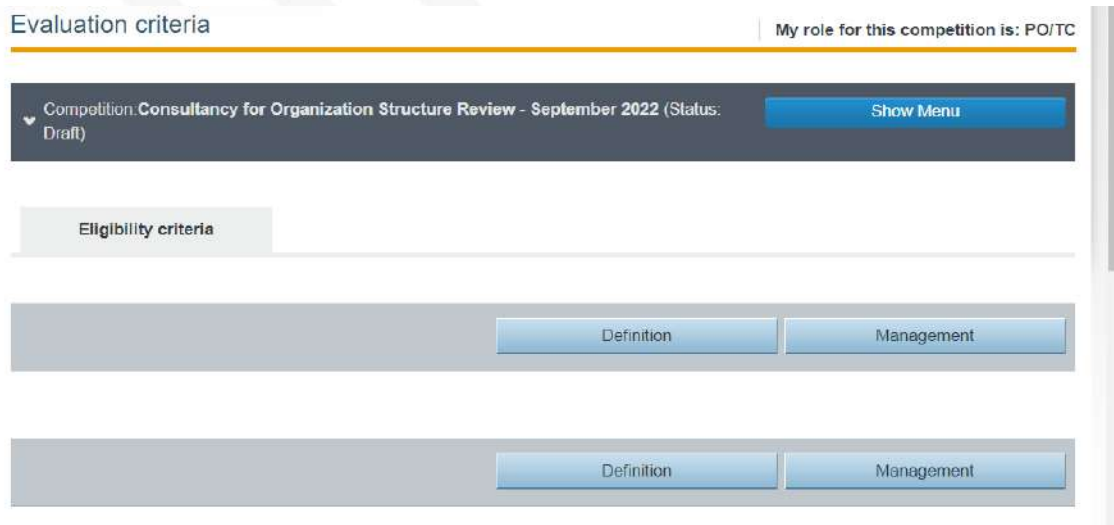
FIGURE 4-3: Evaluation criteria page

6. To define the "Eligibility criteria" refer to details in the "Define Eligibility Envelope sections" on page 127 A completed setup may be as shown in the below image. This is dependent on how granular the user intends the configuration setup to be.

FIGURE 4-4: Eligibility criteria defined

7. Following the definition of the Evaluation criteria, Select the "Publish contract notice" task as appears on the Homepage task menu to complete the publication and upload of competition documents as detailed in the "Publish Contract Notice " on page 94 section.

4.3.1 Create Stage 2 of the Two-Stage Tender Competition

After the completion of Stage 1 Evaluation exercise, the Tender Coordinator user will be tasked with the creation of Stage 2 of the competition by completing the following steps.

1. Select the "Start New Cycle" task from the Homepage Task menu or Select the "Start new evaluation cycle" button which is displayed on the "View Competition details" page as follows:

View Competition details	My role for this competition is: PO/TC
Start new evaluation cycle	Show Menu
Bid submission deadline in (days/hours):	31/8

FIGURE 4-1: Start new evaluation cycle button

2. Select the "Define evaluation criteria" task from the Homepage Task Menu.

3. Define the Evaluation criteria for Stage 2 of the Competition by completing the following:

    a. Select the "Next" button on the Evaluation criteria page.

    b. Define the Technical and Financial sections of the Bid by following the steps outlined in the "Define Technical Envelope sections" on page 129 and "Define Financial Envelope" on page 132 sections.

4. Select the "Send invitations" task from the Homepage Task Menu. User will now be prompted to create and send invitation to shortlisted bidders who met the minimum evaluation threshold during Stage One (1) of the assessment process. Instructions on how to Send invitation is detailed in the "Send Invitations" on page 100 section of this document.

4.3.1 Upload and View Restricted Documents

1. Select the Tender Competition using the "View Tender Competition details" on page 38feature.

2. Select the "Competition Menu (Show Menu) ", then Select the "Restricted area" menu option.

3. The "Restricted area" page opens and displays uploaded "Restricted" documents, if any.
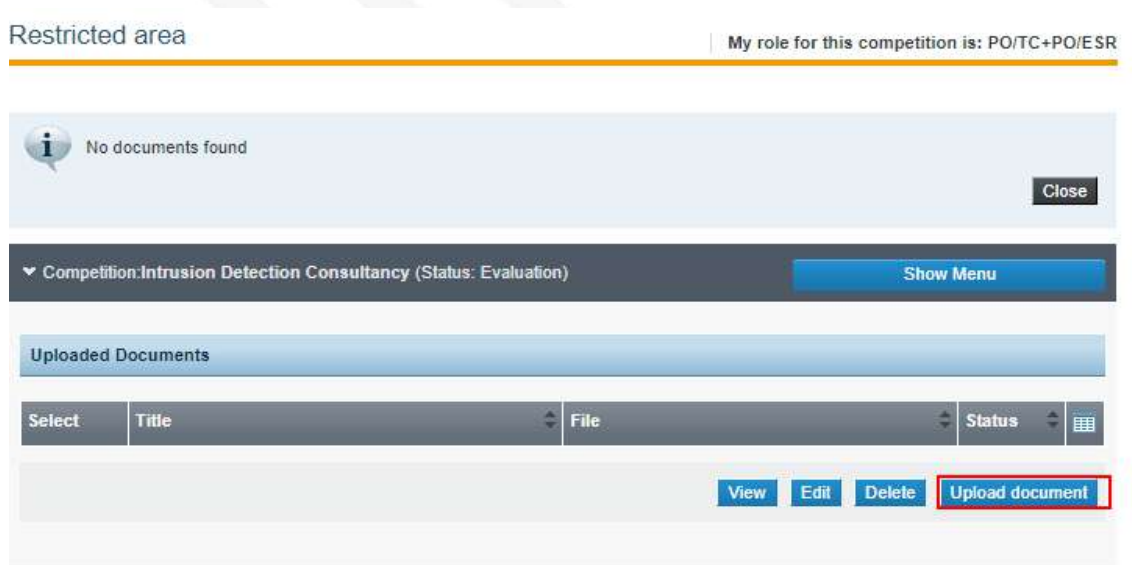
FIGURE 4-1:   Restricted area page

4. To Add document(s), Select the "Upload document" Button which expands the page providing functionality for adding documents.

Restricted area

My role for this competition is: PO/TC+PO/ESR

i   No documents found

Close

▼ Competition:Intrusion Detection Consultancy (Status: Evaluation)   Show Menu

Uploaded Documents

Select	Title	File	Status	⊞

View   Edit   Delete   Upload document

Add/Edit Document

*Title:

* Language: English

Description:

(Maximum characters: 50000)

* Attachment: Choose File   No file chosen

* Status: ◯ Draft   ◯ Final

Create   Cancel
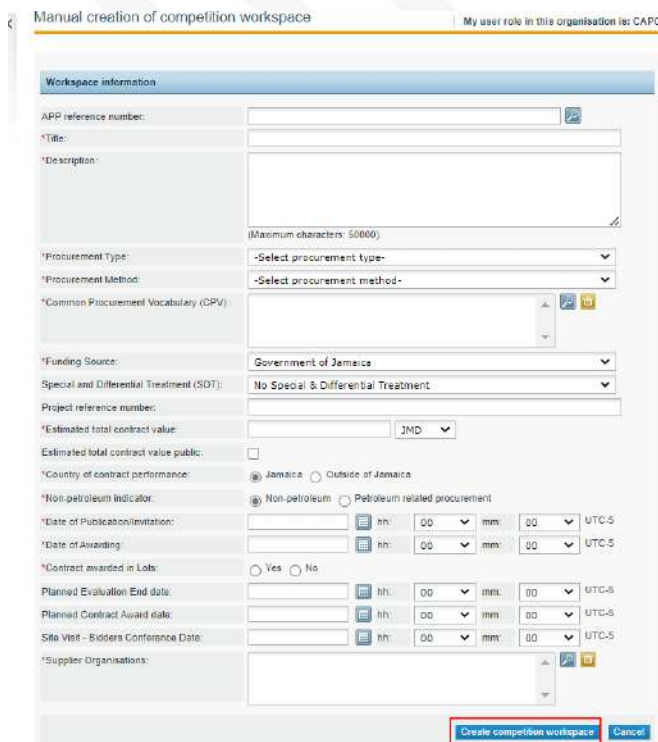
FIGURE 4-2:   Upload Restricted Documents page

5. Populate the relevant fields and Select the "Choose File" Button to attach the document.

6. Select the "Final" Radio button option then

7. Select the "Create" Button to add and save the document.

4.3.1 Enter Manual Procurement Information

1. Select the "Manual data entry" link from the "CfT Creation" section of the Homepage:

2. Populate the tender competition data in the "Workspace information page":

FIGURE 4-1:   Manual competition creation page

3. Select the "Create competition workspace" button to save the record.

5 Online Evaluation configuration

5.1 General Information

This section of this chapter provides overview of the available functionalities for configuration of a tender competition for online evaluation an covers the following topics:

5.1.1 Online Evaluation overview

The System supports automated bid evaluation based on defined evaluation criteria. This is possible through features that allows for the creation of complex tender evaluation structures, and offers an unlimited number of possibilities, where the Procurement Officer has the flexibility to define a granular content for the "Eligibility", "Technical" and "Financial" envelopes. In particular, the system provides mechanisms for defining sections, nested sub-sections with their respective weights and thresholds for evaluation. Each section may also include an unlimited number of criteria and associated weights. Finally, the system supports different types of criteria such as text, text area, file, number, lists, dates, etc. Where tender competitions include multiple lots, the Procurement Officer may also decide which criteria are common to all lots or specific to a particular lot. To configure a tender competition for Online Evaluation, the Workflow configuration must be defined for full "Online Evaluation".

The tender structure may be created from scratch, or the user may select an existing template structure as provided for in the initial Evaluation criteria setup page.
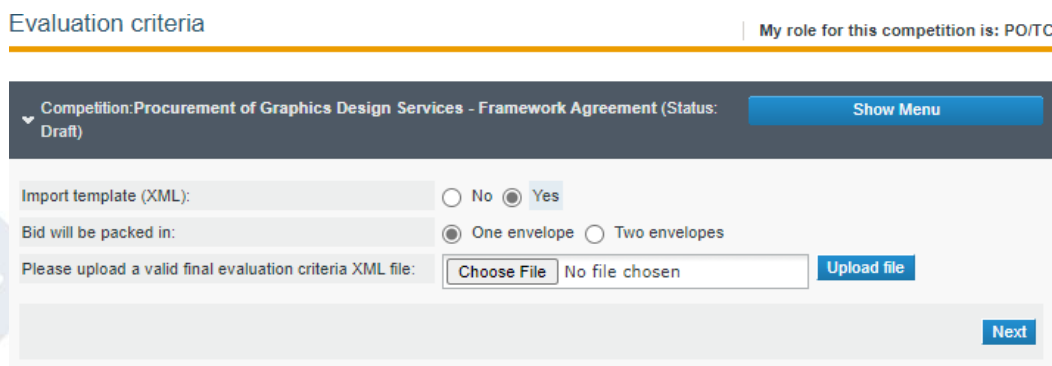
FIGURE 5-1: Evaluation criteria page 1

In the latter case, the user is allowed to edit the previously defined structure template to satisfy the specific requirements of the entity.

The tender evaluation structure is stored in an XML file format template. These XML templates can be imported or exported for all supported types of tendering methods and hence may be reused through different competitions thus providing for re-

utilization and thus efficiency gains are fully achieved. The system provides a dedicated Tender Structure library available to all PEs and all past XML structures are stored in this area.

Once a tender structure has been finalized by the Procurement Officer, it is saved in the tender structure repository and is added along with all other finalized tender structures. It will be available for the procuring entity users to re-use this structure along with all other past tender structures in the setup of a competition. At any time during the tender structure definition process, the user can preview the current tender structure.

Configuration of tender competitions for Online evaluation requires the setup of a number of elements, including the structure segments and Evaluation criteria to be used.

Indicative sequence of steps for Online Evaluation configuration are detailed in the Process section of this chapter.

5.1.1 Online Evaluation Tender Structure

Creation of the tender structure requires the definition of questions that Bidders are required to provide answers to in order to submit a Bid. Some of these "questions" must constitute evaluation criteria. The criteria are defined in a structured way, separating into three categories (Eligibility, Technical and Financial) which can be grouped into one (1) or two (2) envelopes.
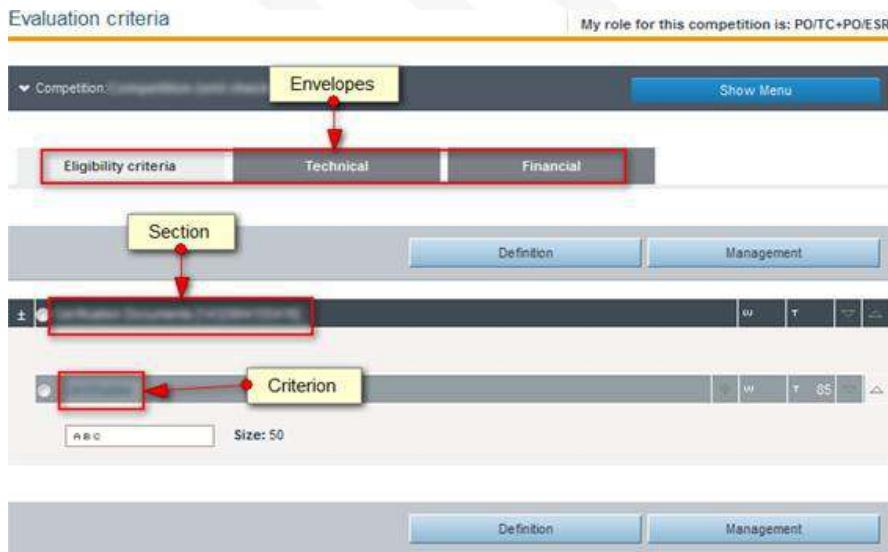
FIGURE 5-1: Online Evaluation criteria definition page

The Eligibility and Technical parts of a Tender Structure are organized into Sections and Sub-Sections which may contain numerous criteria.

For reach Section or Sub-Section, the following information is required:

- Label of the section

- Weight of the section - Required if the Evaluation Mechanism is Quality-Price, (The sum of the section weights should be equal to 100).

Within each section or sub-section, particular evaluation criteria must be defined. Refer to "Online Evaluation Criterion types" on page 115

5.1.1 Envelope and Criteria Weight

Where the tender competition employs the Quantity, Cost Based Select (QCBS) evaluation mechanism, the score weighting between the Technical and Financial Envelopes must be defined. Also weighting must be defined amongst the various criteria used within the Eligibility and Technical Envelope segments.

1. Envelope Weighting:
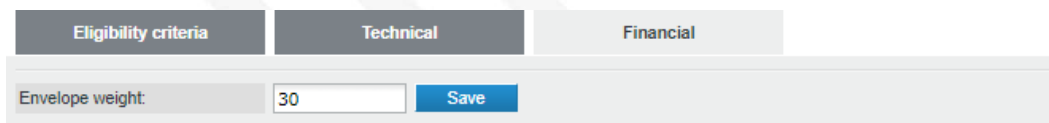
FIGURE 5-1: Evaluation Weighting section

   a. The sum of the weights of the Technical and Financial envelopes must equal 100.

   b. The user needs to define the weight in only one (Technical or Financial) envelope. The second envelope will be automatically assigned the remaining weight (e.g 70/30, 80/20 etc).

2. Section Weighting:

   a. Criterion Weight - The sum of all criterion weights within a specific section must be equal to 100, so as to define their relative weights This weighting mechanism is used in the case of Quality-Price, or when the procedures foresees the short-listing of Suppliers.

   b. Criterion Threshold - The required scored threshold for a Supplier to pass the specific criterion.

5.1.1 Online Evaluation Criterion types

The system supports the definition of Evaluation Criteria for the Eligibility, Technical and Financial Sections of the competition. The evaluation criteria can also include weightings in case "Quality - Price" is selected as the Evaluation Mechanism for a competition.

Within each section or subsection, the system supports the use of the following evaluation criteria namely, Text Field , Text area, Number, Date, File and List.
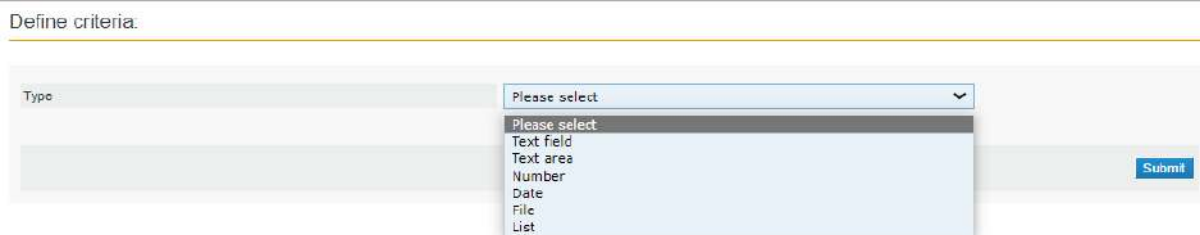
FIGURE 5-1: Define criteria section

The following properties are common for all criteria

- The label of the criterion

- If the criterion is mandatory or not.

- If criteria is Supplier Read only

- Textual Evaluation - This choice is enabled if textual evaluation will be used for the specific criterion

The system allows for each criterion to be defined as "Read only" , for which the Supplier will view the existence of the criterion but the scoring will be provided directly by the evaluators (e.g. scoring based on a Software product demonstration). In this respect, such criteria are "Read only" for Suppliers and Read / Write access is provided only to the Evaluators.

Information requirements per criterion type are listed in the following pages / sections.

5.1.1 Text Field Type Evaluation Criteria

The Text Field criteria allows for the provision of a 'Text' responses by the Bidde, as well as to attach and upload supporting document.

The fields to be defined for this criteria are as displayed in this figure:

FIGURE 5-1: Define criteria - Text Field type page

If the criterion is included in the Evaluation Criteria, a Weight and Threshold has to be defined.

5.1.1 Text Area Type Evaluation Criterion

The Text Area criteria allows for the provision of a Narrative responses by the Bidder, as well as to attach and upload supporting document. This narrative could be the description of Work Plan or Instructions etc.

The fields to be defined for this criterion is as displayed in this figure:

FIGURE 5-1: Define criteria - Text Area type section

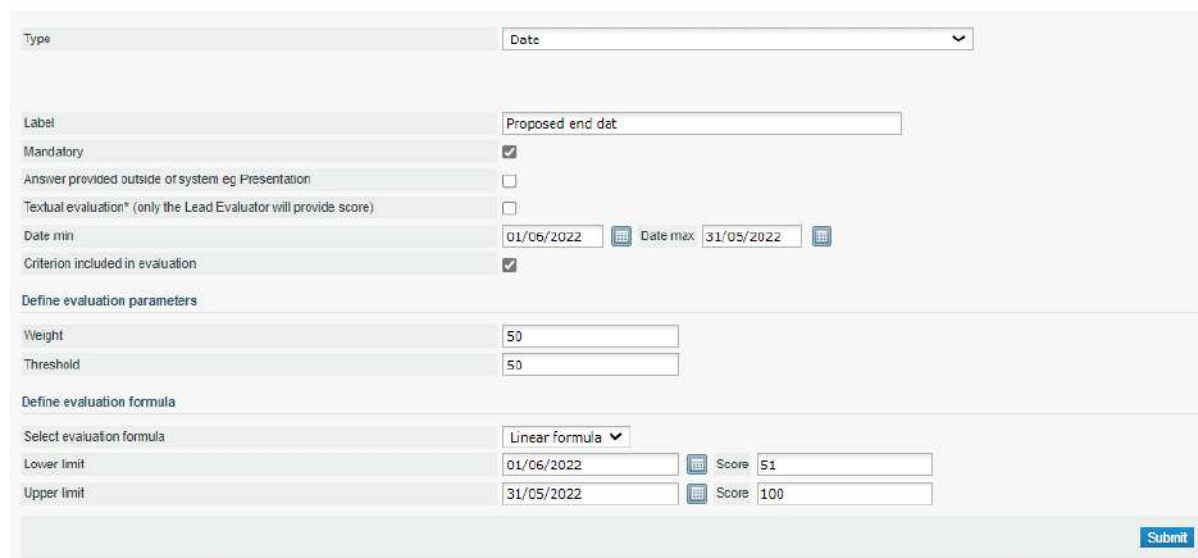If the criterion is included in the Evaluation Criteria, a Weight and Threshold has to be defined.

5.1.1 Number Type Evaluation Criterion

The following parameters must be defined:

- Minimum and Maximum range

- Measurement units

- Steps

The system can support the automated scoring of any quantifiable criteria, and the criteria must be defined to use one of two formulas:

1. Linear Formula - The criterion is defined with lower and upper limits with their respective scores

FIGURE 5-1: Define criteria - Number type page - 1

2. Step Formula - The criterion is defined with value ranges and their associated scores. Selecting the "Add" and "Delete" buttons inserts and deletes scoring ranges.

FIGURE 5-2: Define criteria - Number type page 2

5.1.1 File Type Evaluation Criterion

This criterion allows for the Bidder to attach and upload a single document (file) containing the response to the requirements of the solicitation document. The content of the document will be evaluated by the evaluation committee.

For this criterion, it is important that the maximum allowed files size be defined. The standard system file is 99 Mega-byte (MB). It is recommended that this be default for procurement activities.

FIGURE 5-1: Define criteria - File type page

If the criterion is included in the Evaluation Criteria ,a Weight and Threshold has to be defined.

5.1.1 List Type Evaluation Criterion

In order to create, a list, the following options should be defined:

- Type of List; a choice between Radio button, Check box and Common box.

- Number of options: The user provides the number of options that should be created.

- Label - The label for each option created.

- Score - The automated evaluation score for each option.

FIGURE 5-1: Define criteria - List type page

If the criterion is included in the Evaluation Criteria ,a Weight and Threshold has to be defined.

5.1.1 Date Type Evaluation Criterion

To create the Date type criterion, the following key information must be provided:

- The minimum and maximum allowed values for the date criterion.

- The Evaluation formula (Line formula and step formula) similar to the Number criteria.

FIGURE 5-1: Define criteria - Date type page

If the criterion is included in the Evaluation Criteria, a Weight and Threshold has to be defined.

5.1.1 Online Evaluation configuration tools

The system presents a set of utilities or tools to allow for the configuration of the evaluation criteria.

These tools are accessed through one of the two Menu option used in the configuration for each Envelope as follows:
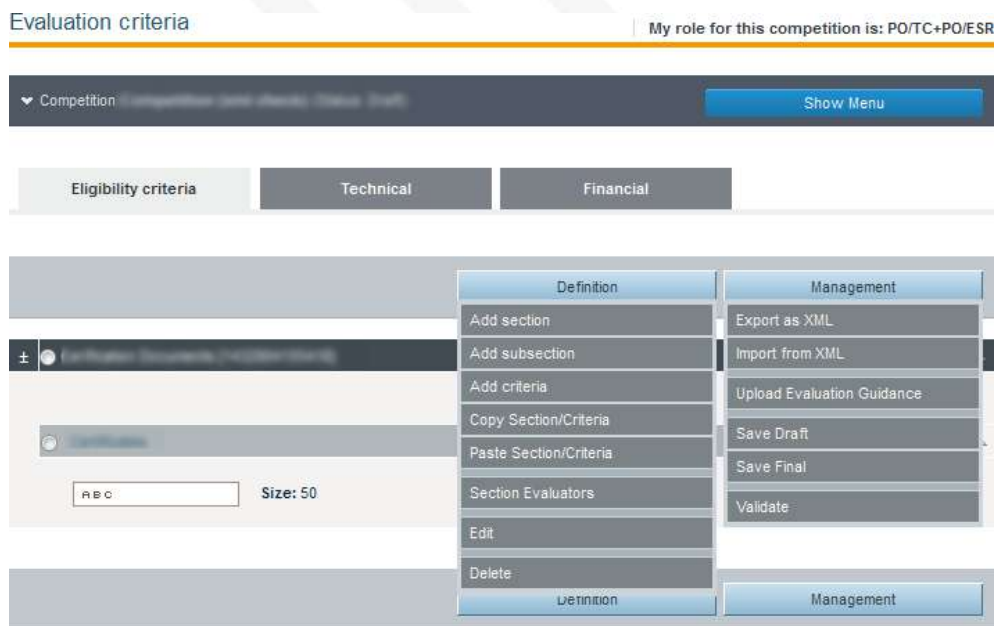
FIGURE 5-1: Online Evaluation Criteria definition tools list

1. Tender Structure Definition Menu:
   a. Add Section - To Add / create a Section
   b. Add Sub-Section - To Add a Sub section to a main section.
   c. Add Criteria - For defining the criteria for a Section or Sub-section
   d. Copy Section / Criteria - To Copy a Section / Subsection so as to use for defining another section.

e. Paste Section / Criteria - To paste a section / subsection that was 'copied'

f. Section Evaluators - To define Evaluators with specific responsibility for evaluation of a section of the competition.

g. Edit - To edit a section/ subsection or criteria which was previously defined.

h. Delete - To remove a Section, Sub-section or criteria from the structure.

2. Tender Structure Management Menu:

a. Export as XML - To export the Tender structure as an XML format file so that it can be reused in another tender competition.

b. Import from XML - To import a previously created tender competition. Once done, the structure may be modified to fit the evaluation requirements of the competition imported into.

c. Upload Evaluation Guidance - To Upload Guidance / Instructions for Suppliers to assist in responding to the Bid.

d. Save Draft - To save the tender structure in draft format.

e. Save Final - To save as Final.

f. Validate - To have the system validate the structure for setup and completeness.

5.2 Process

The Process section of this chapter provides instructions on how to execute tasks and procedures for Online Evaluation configuration and covers the following topics

5.2.1 Define Envelope Packaging

The first step in the setup of a tender competition for Online evaluation is to define the packaging for evaluation.

1. Select the "Define evaluation criteria" task as appears on the Homepage task menu.

2. In the Evaluation criteria page, make one of the following selections for packaging:
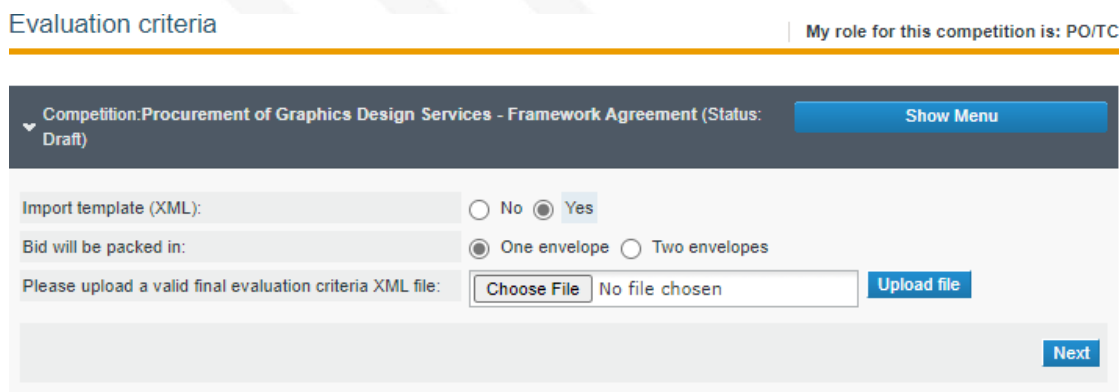
FIGURE 5-1:   Evaluation criteria - page 1

a. Select the "One envelope" radio button if access to the Technical and Financial envelopes is required at the first unlocking phase.

b. Select the "Two envelope" radio button if the Technical evaluation scoring must be completed and finalized prior to the system allowing unlocking of the Financial proposals envelope. In such a case, the system will only allow opening of Financial envelopes for Bids that have met the minimum / threshold for the technical proposal.

3. Select the "Next" button to move to the definition of the envelope segments and evaluation criteria for each.

5.2.1 Define Eligibility Envelope sections

To define the Eligibility envelope sections (criteria):

1. Select the "Eligibility criteria" tab in the "Evaluation criteria" page as shown below:
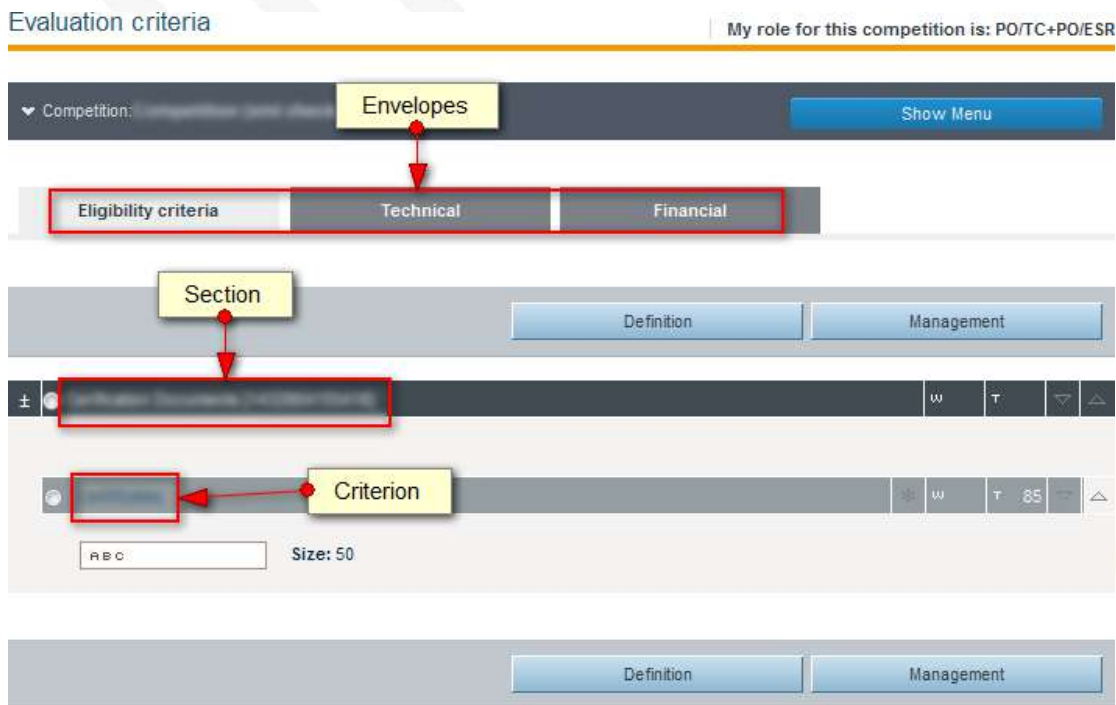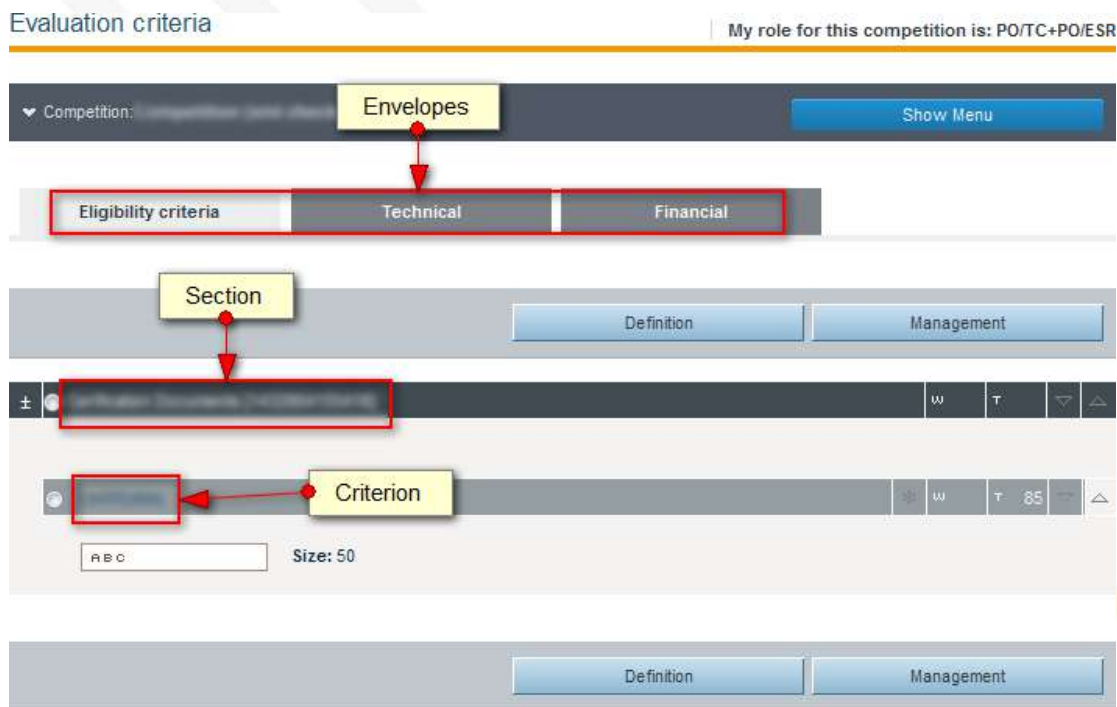

FIGURE 5-1: Evaluation criteria main page

2. Select the "Definition" button followed by the "Add section" menu option.

3. Provide an appropriate name for the Section element "Label"
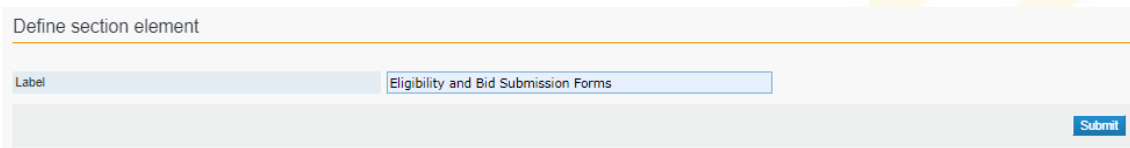
FIGURE 5-2: Define section element

4. Select the "Submit" button to complete addition.

5. If required, repeat to add additional section element(s).

6. To add Sub-section to a Section Element, Select the Element , then Select the "Definition" button followed by the "Add sub-section" menu option. Provide an appropriate name for the Sub-Section element "Label".

7. Once the Sections / Sub- section have been defined, the user will need to define the Evaluation criteria for each element.

8. Select the "Management" button followed by the "Save Draft" button to save the definitions.

5.2.1 Define Technical Envelope sections

To define the Technical envelope sections (criteria):

1. Select the "Technical" tab in the Evaluation criteria" page as shown below:

FIGURE 5-1: Evaluation criteria main page

2. Select the "Definition" button followed by the "Add section" menu option

3. Provide an appropriate name for the section " Label".

FIGURE 5-2: Evaluation criteria section label

4. If the section element is included in the evaluation criteria:

   a. Specify the weight of this element relative to all the elements for the technical envelope.

   b. Specify the minimum (threshold) score that must be achieved by the Bidder for this element.

5. Select the "Submit" button to progress to add more Elements by repeating the above steps.

6. To add Sub-section to a Section Element, Select the Element, then Select the "Definition" button followed by the "Add sub-section" menu option. Provide an appropriate name for the Sub-Section element "Label".

7. Once the Sections / Sub- section have been defined, the user will need to define the Evaluation criteria for each element.

8. If using the QCBS Evaluation mechanism, define the Envelope Weight if not already done.

9. Select the "Management" button followed by the "Save Draft" button to save the definitions.

5.2.1 Define Evaluation Criteria

Evaluation criterion must be defined for each of the elements that have been defined for an Envelope Section / Sub-section of the Eligibility and Technical envelopes.

1. Select the Element of interest , then Select the "Definition" button, followed by the "Add criteria" menu option.

2. Select the type of criteria to be used from the Criteria drop down list in the "Define criteria" page.

FIGURE 5-1:   Evaluation criteria list page

3. Populate the required information in the "Define criteria" page.

4. Select the "Submit" button to insert criteria.

5. Repeat the above steps for all the created elements in the Eligibility and Technical envelopes.

6. Select the "Management" button followed by the "Save Draft" button to save the definitions.

5.2.1 Define Financial Envelope

Definition of the Financial Envelope requires the setup of the Financial Element followed by the Financial criteria.

1. Define the Financial element first::
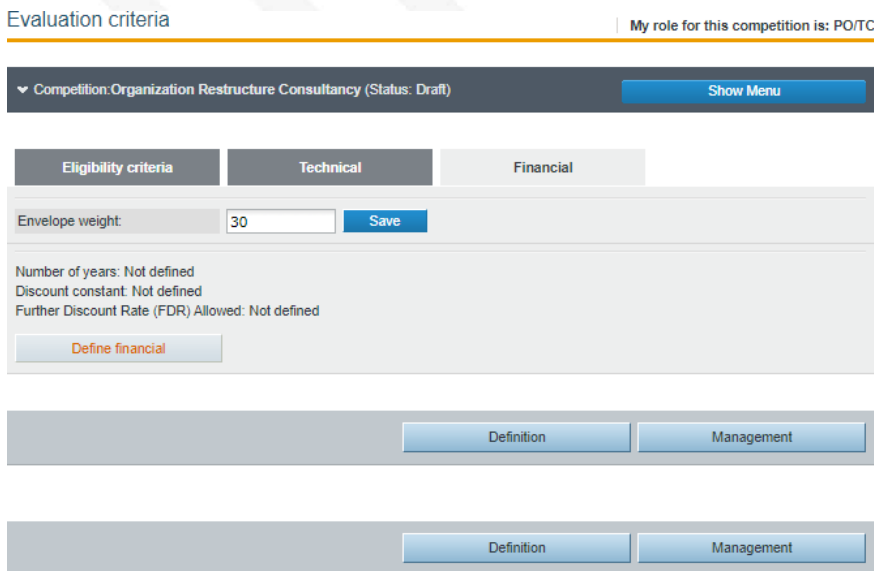
FIGURE 5-1: Define Financial envelope page

a. Select the "Financial" tab in the Evaluation criteria page

b. Select the "Define financial" button (highlighted in red).

c. In the next page, leave the values unchanged and then Select the "Submit" button
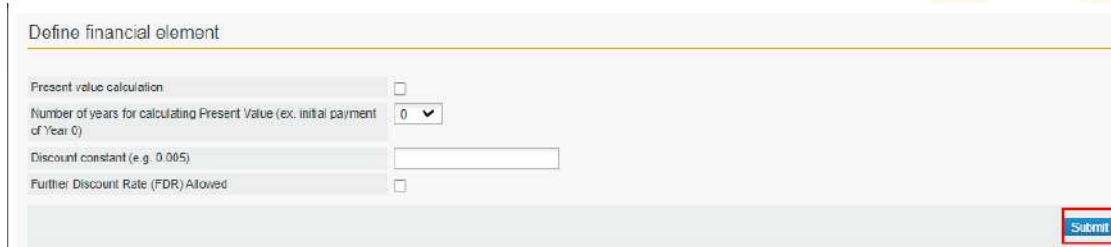
FIGURE 5-2: Define Financial element criteria page

2. Define the Financial criteria

   a. Select the "Definition" button then Select the "Insert financial criteria" menu option.

   b. In the "Define financial criterion" page,

FIGURE 5-3:   Define Financial criterion page

      i. Provide a Label for the criteria

      ii. Select the "Mandatory" check box.

      iii. Select the 'Attachment mandatory" check box.

3. Define the Envelope Weight if not already done, for tender competitions using QCBS Evaluation mechanism.

4. Select the "Management" (As shown below) button followed by the "Save Draft" button to save the definitions

FIGURE 5-4:   Evaluation criteria Management list

5.2.1 Validate and Save Tender Structure

On completion of the configuration of the Envelopes and their sections and evaluation criteria, the user is required to verify that the structure conforms to the system evaluation rules. The validation rules relate only to the soundness and completeness of the tender structure and not to its "business logic". The rules will check whether the weights of criteria in a section sum to 100 and will check whether there is a list of criteria for which possible answers are not defined.

1. Select the "Management" button, then Select the "Validate" menu option.
   a. If the Tender structure is valid, a message "Tender Structure validated successfully" will be displayed.
   b. If the structure is invalid, the displayed message will indicate the nature of the violation. The user will be required to correct the issues identified before rerunning the validation.
2. Once the tender has been validated, the user may save the tender structure as "draft" or "final" Draft tender structures can be modified at anytime. By saving as Final, the user finalizes the structure and no further modifications can be faciltated. To Save as Final, Select the "Management" button, then Select the "Save Final" menu option.

6 Tender Clarifications, Changes and Alerts

6.1 General Information

This section of the chapter covers the following topic:

6.1.1 Clarifications handling overview

The system provides functionalities for the handling of clarifications during the Bid Submission and Evaluation phases of the tender competition.

Clarifications handling during Bid Submission phase:

The Tender Coordinator user will be able to:

- Respond to clarifications raised by Bidders. This will be appear in the task list.

- Upload clarification requests raised offline by Bidders and

- Provide information (clarification) not associated with any particular request.

These functionalities are provided in the three separate tab sections of the "Clarification" page:
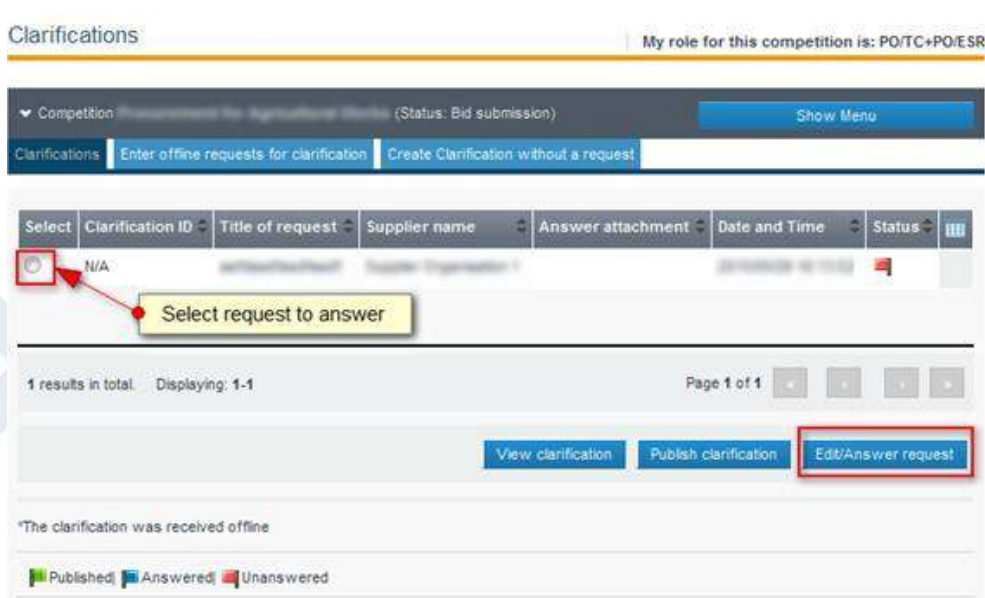
FIGURE 6-1: Clarifications page

Once a request has been raised by a Bidder, a task will be created for the Tender Coordinator user to "Answer clarification request". Upon selection, the above screen will appear. The Clarifications page can also be accessed by selecting the "Clarifications" Competition Show menu option.
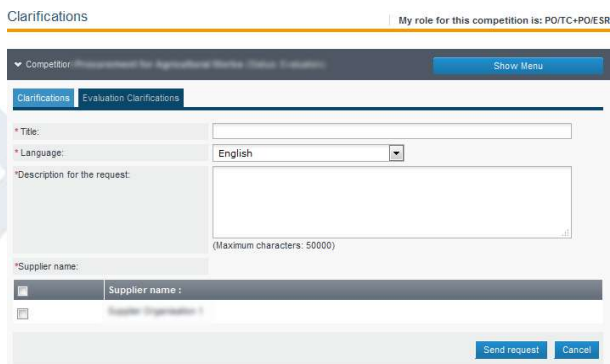
Suppliers can only submit clarification requests, before the stipulated clarification deadline, however the Tender Coordinator can respond after the clarification deadline has passed.

Clarifications request will have one of three statuses:

1. - The clarification request has not been answered (i.e. unanswered).

2. - The clarification request has been answered but not published.

3. - The clarification request has been answered and published.

Clarifications handling during Evaluation phase:

During the evaluation phase, the evaluation team of a competition may contact a Supplier that has submitted a bid in order to request additional information and / or obtain clarifications for the bid. The Clarifications page will now include a tab section for "Evaluation clarifications".

FIGURE 6-2: Clarifications page with Evaluation section

Clarifications raised during the evaluation phase are sent directly to the Supplier of interest without having to go through the publishing workflow.

6.2 Process

This section of the chapter covers the following topics:

OFFICE OF PUBLIC PROCUREMENT POLICY

6.2.1 Respond to Clarification Requests

To respond to a clarification request raised by a Supplier:

1. Select the "Answer clarification request" task from the Homepage which opens the "Clarifications" page.

2. From the list of requests:

   a. Select the clarification request (radio button on the left) for which a response is being made, then:

   b. Select the "Edit / Answer request' button.
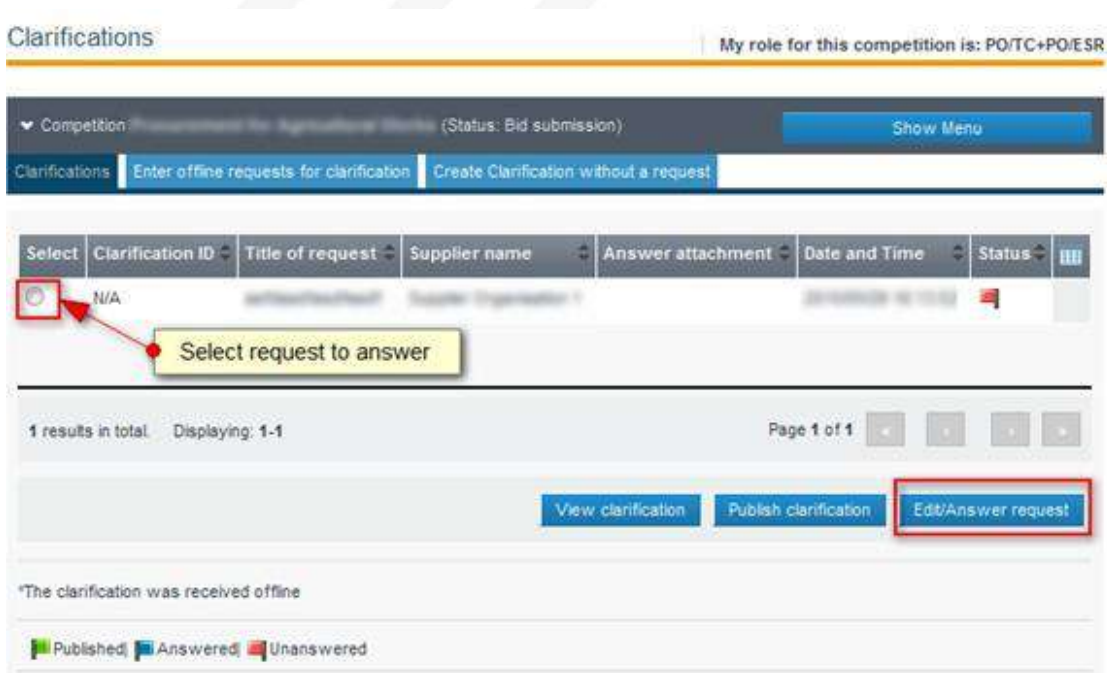
FIGURE 6-1:   Clarifications page

3. Provide response to the following:

Clarifications

My role for this competition is: PO/TC+PO/ESR

FIGURE 6-2:   Provide response to Clarifications page

a. Recipients of the clarification response - Select the Suppliers who must receive the response. The recommended selection is "All supplier users associated with the Competition".

b. Clarifications - Type in a response narrative.

c. Attachment for the clarification - Attach a file / document containing formal response or details in support of the response. This is optional.

4. Select the "Save" button. The status of the request will now be changed to "Answered" with a Blue colored flag indicator. The response will not be available to the Suppliers, until the response is published.

5. To publish the Clarification answer, Select the clarification to publish from the list of clarifications and Select the "Publish clarification" button.
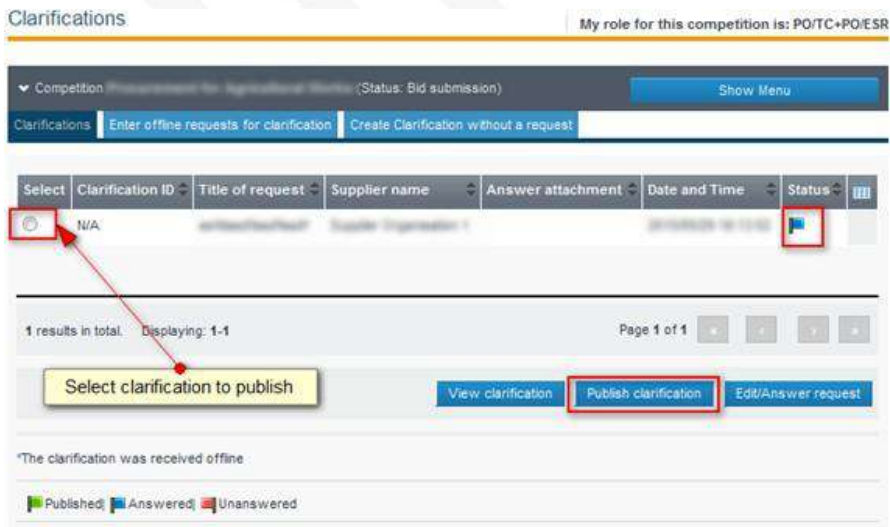
FIGURE 6-3:   Publish Clarifications page

Once the clarification has been published, it will now be made available to Suppliers and the status of the clarification request will be updated to "Published" (Green flag icon).

FIGURE 6-4: Publish Clarifications page - updated

6.2.1 Enter Offline Request for Clarification

To Register a request made outside of the system ("Offline Request for Clarification") :

1. Select the Tender Competition using the "View Tender Competition details" on page 38 feature.

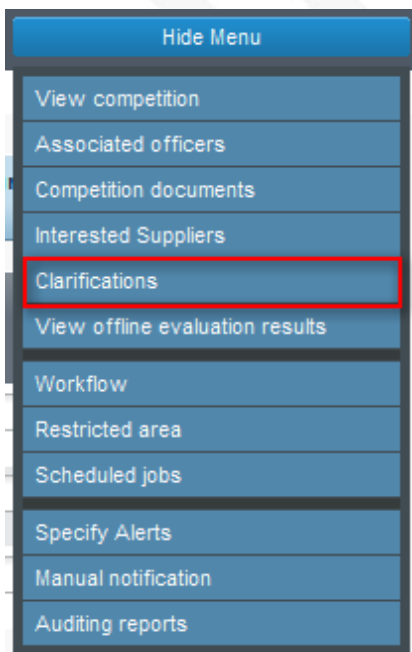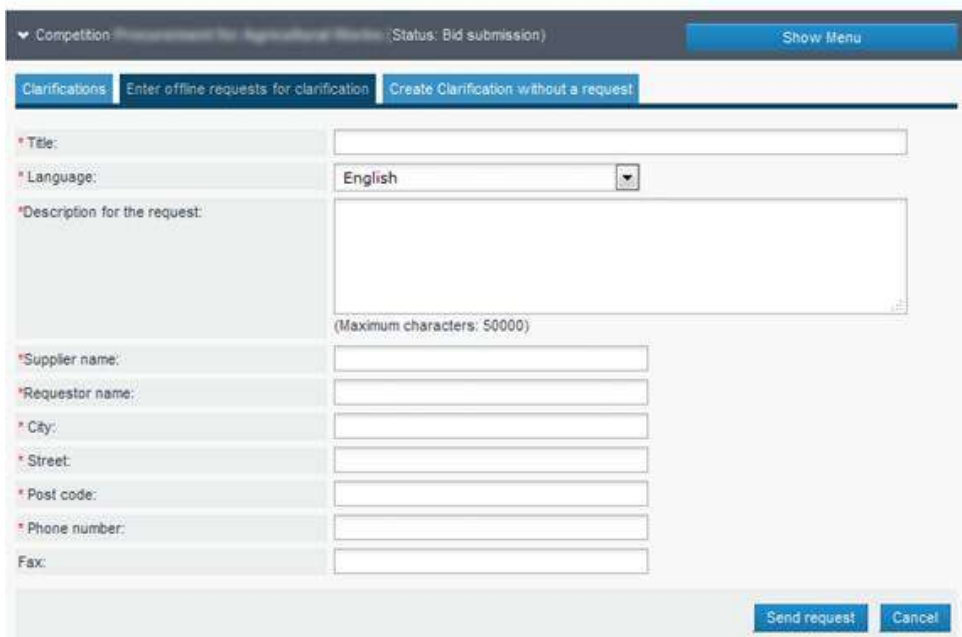2. Select the "Clarifications" Competition Menu option.

FIGURE 6-1:   Competition Menu Clarification link

3. Select the tab "Enter Offline Requests for Clarification" in the "Clarifications" page and then populate the required information in the presented "Clarifications" page.

Clarifications   My role for this competition is: PO/TC+PO/ESR

▾ Competition _____ (Status: Bid submission)   Show Menu

| Clarifications | Enter offline requests for clarification | Create Clarification without a request |

* Title: [_____]

* Language: [English ▾]

*Description for the request: [   ]
                                  [   ]
                                  [   ]
                                  (Maximum characters: 50000)

*Supplier name: [_____]

*Requestor name: [_____]

* City: [_____]

* Street: [_____]

* Post code: [_____]

* Phone number: [_____]

Fax: [_____]

                                          Send request   Cancel

FIGURE 6-2:   Clarifications page

4. Select the "Send request" button

The request will then be displayed in the list of the tender competition clarifications with a Status of " Unanswered" and a reply will need to be done by the Procuring Officer.

6.2.1 Create a Clarification without Request

To create a clarification which was not initially sent by a Supplier:

1. Select the Tender Competition using the "View Tender Competition details" on page 38 feature.

2. Select the "Clarifications" Competition Menu option.

3. Select the tab "Create clarification without a request" on the "Clarifications" page.

4. Provide the following information in the page:

FIGURE 6-1: Clarifications without Request page

a. Title - Subject or Title of the clarification

b. Language - English language is default response.

c. Recipients of the clarification response - Select one or more Suppliers to send the clarification to. The recommended response is "All Supplier users associated with the Competition".

d. Description for the request -

e. Clarifications -

f. Attachment for the clarification -

5. Select the button "Send request" to send the request to the designated suppliers and will automatically publish the Clarification. The Clarification will also be listed in the Clarification page.

The Tender Coordinator can publish a clarification without request even after the clarification period deadline and until the bid submission deadline.

6.2.1 Download Clarification responses

To generate and download a PDF copy of published tender competition clarification responses:

1. Select the Tender Competition using the "View Tender Competition details" on page 38 feature.
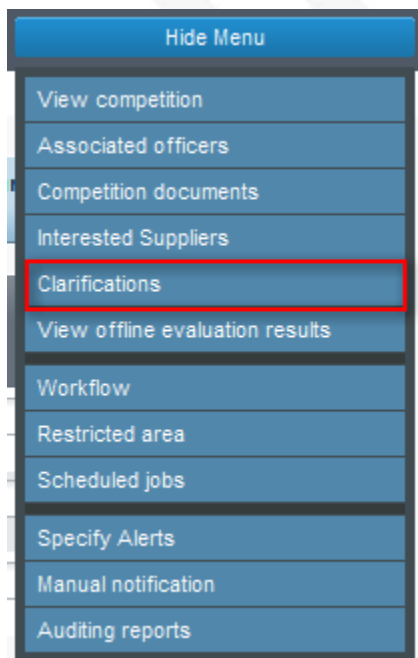
2. Select the "Clarifications" Competition Menu option.

3. Select the "Download all published clarification" button at the bottom of the Clarifications page.
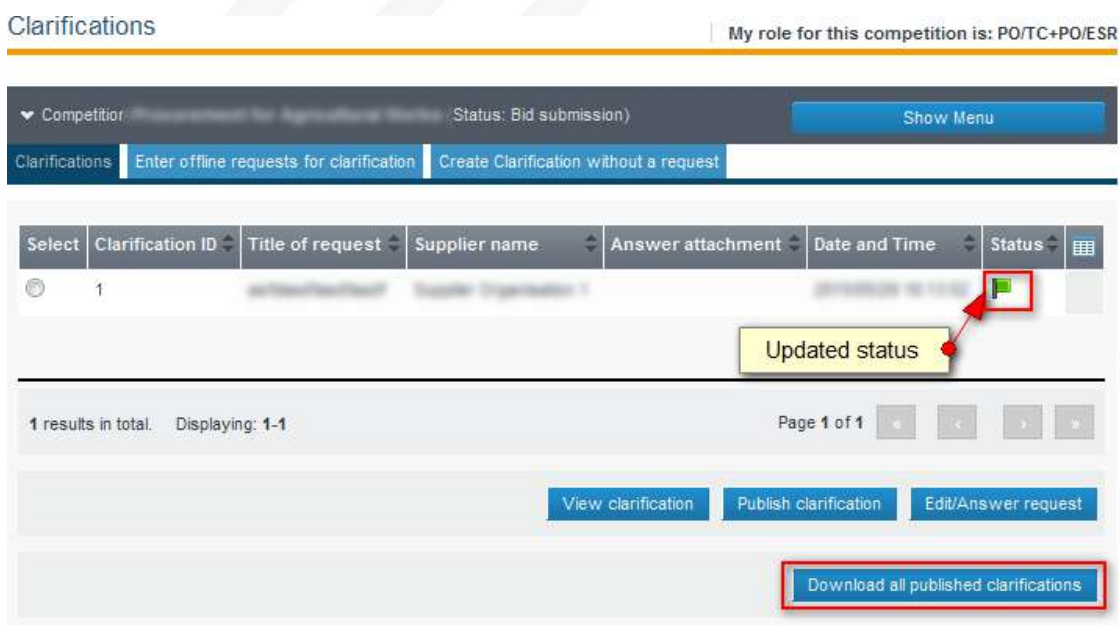
FIGURE 6-1: Download Clarifications page

6.2.1 Extend Clarification Period

The system allows for the extension of the deadline for clarification submission, providing the deadline has not expired. To extend the clarification period:

1. Select the Tender Competition using the "View Tender Competition details" on page 38 feature.

2. Select the "Edit competition details" button at the bottom of the "View competition details page" on page 1

3. Enter the new date in the "Deadline for clarification" field prompt.

4. Select the "Save changes" button.

The system will send an email notification to "Interested Suppliers" indicating that modifications have been made to the tender competition.

The email notification does not state the exact nature of the details that were modified, so it is recommended that the Tender Coordinator should create and publish an Addendum Notice.

6.2.2 Request Evaluation Clarification

To request an evaluation clarification from a Bidder:

1. The Lead Evaluator (PO/ESR) shall, Select the Tender Competition using the "View Tender Competition details" on page 38feature.

2. Select the "Clarifications" menu option under the" Competition Menu":

FIGURE 6-1:   Competition Menu - Clarifications link

3. Select the tab "Evaluation clarification" tab and populate the details in the "Clarifications" page.

FIGURE 6-2:   Evaluation Clarifications page

   a. Title - Enter Title or Subject of clarification request.

   b. Language - English language is the default response

   c. Description for the request - Enter clarification narrative

   d. Supplier name - Select the Supplier or Suppliers to whom the request should be sent.

4. Select the "Send request" button to send the request.

Once a response is provided by the supplier, a new task "View Answer for Evaluation Clarification" will appear in the Homepage of the Tender Coordinator user.

6.2.1 Issue Addendum Notice

1. Select the Tender Competition using the "View Tender Competition details" on page 38 feature.

2. Select the "Competition Documents" Competition Menu option.

3. In the "Notice & Contracts Document" page: Select the

   "Edit" button in the "Notices" page.
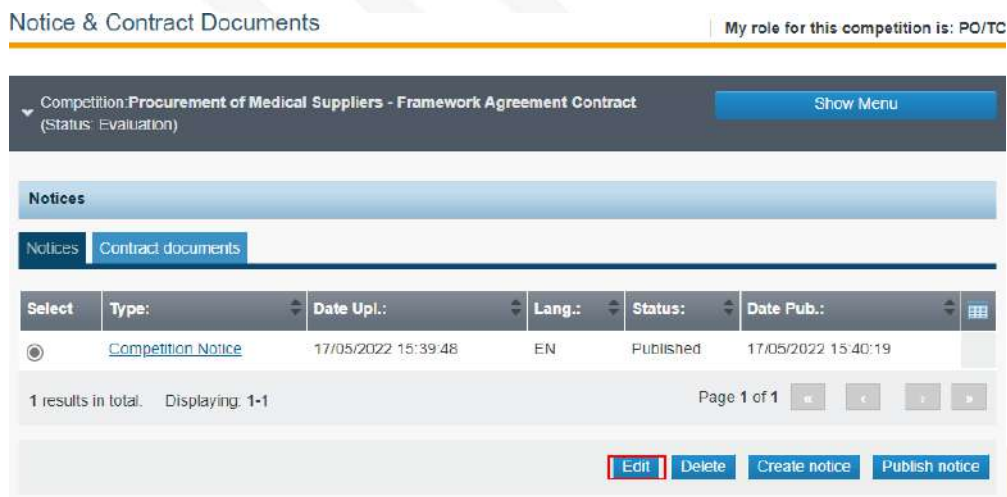
FIGURE 6-1:   Notice & Contract Documents page

4. Select the "OK" button in response to the query: "Do you want to issue an Addendum Notice"

5. Provide responses in the "Addendum Notice" page as follows:

FIGURE 6-2:   Addendum Notice page

a. Title - Title or Subject of the Addendum.

b. This Notice involves:

   i. Correction - Select the "Correction" radio button option to make an addendum to the original published Notice without canceling the competition.

   ii. Incomplete Procedure - Select the "Incomplete procedure" radio button option when an addendum is being published as part of the intent to cancel the tender competition.

c. Text Box - Narrative of the addendum.

6. Select the "next" button.

7. Select the "Save Final" button. The Addendum Notice will now have a Status" of "Final"

8. In the Notices page, Select the Addendum Notice to be published, and then Select the "Publish notice" button.

Interested Suppliers will receive an email notification of the Addendum Notice.

6.2.1 Extension of Bid Submission Deadline

The system allows for the extension of the deadline for bid submission, providing the deadline has not expired. To extend the bid submission deadline:

1. Select the Tender Competition using the "View Tender Competition details" on page 38 feature.
2. Select the "Edit competition details" button in the "View competition details page" on page 1
3. Enter the new date in response to the "Deadline for bid submission" question.
4. Enter the new date in response to the "Bid opening date" question.
5. Select the "Save changes" button.

The system will send an email notification to "Interested Suppliers" indicating that modifications have been made to the tender competition.

The email notification does not state the exact nature of the details that were modified, so it is recommended that the Tender Coordinator user (PO/TC) should create and publish a competition addendum notice providing all relevant details on the extension / modification to the bid.

6.2.2 Extend Clarification Period

The system allows for the extension of the deadline for clarification submission, providing the deadline has not expired. To extend the clarification period:

1. Select the Tender Competition using the "View Tender Competition details" on page 38 feature.

2. Select the "Edit competition details" button at the bottom of the "View competition details page" on page 1

3. Enter the new date in the "Deadline for clarification" field prompt.

4. Select the "Save changes" button.

The system will send an email notification to "Interested Suppliers" indicating that modifications have been made to the tender competition.

The email notification does not state the exact nature of the details that were modified, so it is recommended that the Tender Coordinator should create and publish an Addendum Notice.

6.2.3 Disassociate or Change Associated Users

Users assigned to roles in the management of a tender competition, can be dis-associated (removed) at any time as necessary. To disassociate a user:

1. Select the Tender Competition using the "View Tender Competition details" on page 38 feature.

2. Select the "Associated officers" menu option from the Competition Menu.

3. In the "Associated officers" page, Select the "Disassociate" link next to the officer to be removed from the competition.
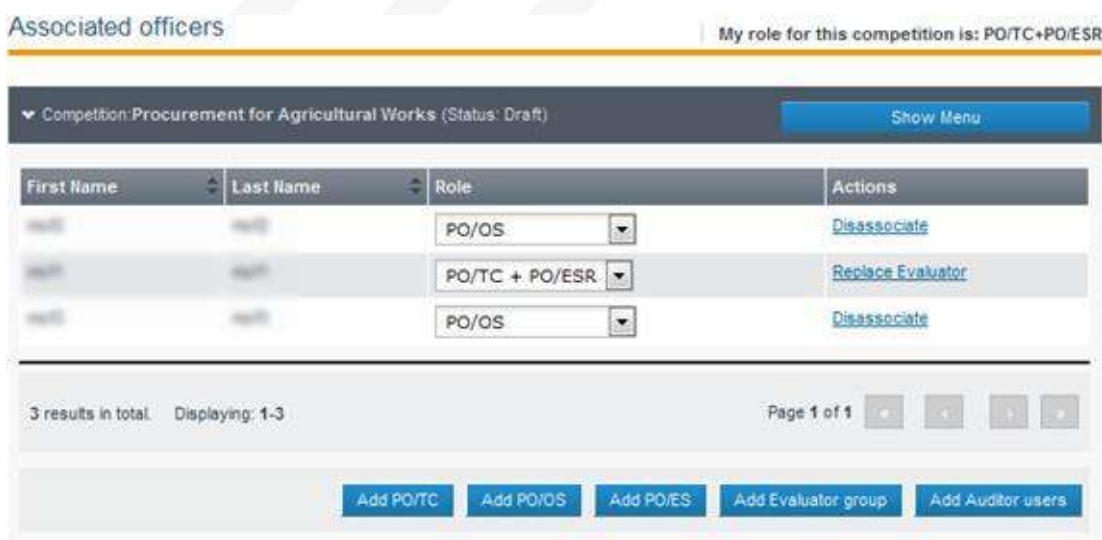
FIGURE 6-1:   Associated Officers page

In the event one of two associated PO/OS officers has been removed, the system will issues a message "Currently 1 PO/OS are associated. Please associate 2 users as PO/OS". An "Associate PO/OS" and P/ES" task will also be shown in the Homepage task list section of the tender coordinator.

6.2.1 Cancel Tender Competition

Tender competitions can only be canceled by the associated Tender Coordinator (PO/TC) user. To cancel a tender competition:

1. Select the Tender Competition using the "View Tender Competition details" on page 38 feature.

2. In the "View competition details page" on page 1 page, Click the drop-down from the "Cancellation Reason" prompt at the bottom of the page and select the appropriate justification from the listed options.

*Cancelation Reason:	⌄	
	No qualified bid	Cancel Competition
	Modifications to bid documents	
	Product-Service no longer required	
Export Competition	Budgetary - Financial considerations	
	Board - Committee recommendations	
	Tender incorrectly configured in system	

FIGURE 6-1:   Cancellation Reason prompt list

3. Select the "Cancel Competition" button.

4. Interested suppliers will be notified of the cancellation by e-mail.

6.2.1 View Interested Suppliers

The system provides an indication of Suppliers who have expressed an interest in the tender competition, either by means of having downloaded the competition contract documents or submission of a Clarification request. Suppliers who have been sent an invitation for participation in a Restricted or Single Source Bid, are also denoted as Interested Suppliers. by the system,

To view the list of Interested Suppliers:

1. Select the Tender Competition using the "View Tender Competition details" on page 38feature.

2. Select the "Show Menu" Competition Menu button, then select the "Interested Suppliers" option.
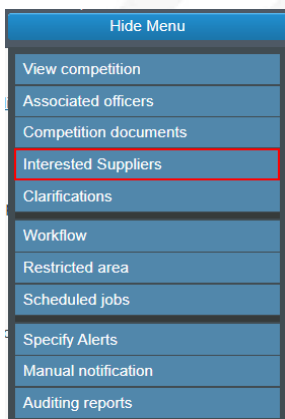
FIGURE 6-1: Competition Menu - Interested Suppliers link

3. The "List of suppliers" page will open highlighting the Suppliers as listed the "Interested Suppliers" as listed above.

6.2.1 Update Tender Competition Alerts

The system provides functionality for the Tender Coordinator (PO/TC) to receive Alerts (Reminder notifications) for specific events during the tender competition's bid submission, tender opening and evaluation phases. Default alert settings are set at tender creation, however the tender coordinator can make changes to these settings. To change the Alerts settings:

1. Select the Tender Competition using the "View Tender Competition details" on page 38 feature.

2. Select the "Show Menu" Competition Menu button, then Select the "Specify Alerts" option.
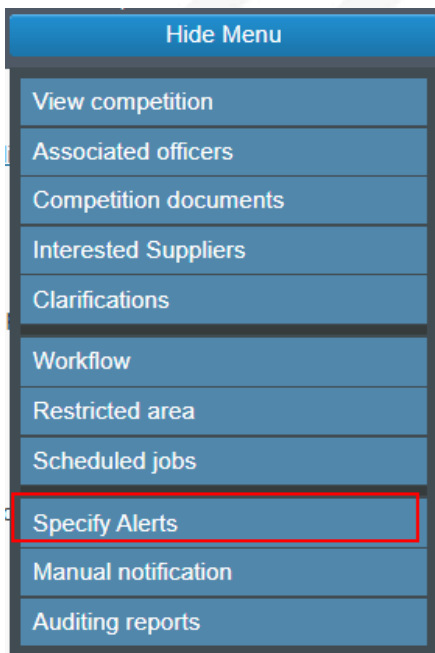
FIGURE 6-1: Competition Menu - Specify Alerts link

3. In the "Specify Alerts" page make changes to the system defined alerts as necessary: Alerts are defined for the following pending events or events.

a. Time limit for receipt of bids or request to participate

b. Request for clarification from Suppliers

c. Requests for clarification to Suppliers

d. Evaluation has been approved

e. Evaluation has been finished

f. Bids opening has been approved

4. Click the "Save" button to effect the changes.

It should be noted that similar functionality is also available for Suppliers to define Alerts in respect of tender competitions they have subscribed to.

7 Bid Opening

This chapter covers the following topics:

7.1   General Information

This section of the chapter covers the following topic:

7.1.1 Electronic Tender opening overview

The system provides functionality for Suppliers to submit their bid proposal in the system. This is done by through functionalities that allows suppliers to create, encrypt and submit or upload their bids. All electronic bid submissions are stored in an encrypted file format until the official tender opening ceremony. The encryption mechanism generates public-private keys for the encryption and decryption of the bids. All bids must be submitted before the defined tender submission deadline.

For tender submission performed offline (i.e. submitted outside of the context of the system either as an email to the Procuring Officer or on paper), the system provides functionality for such bids to be uploaded as part of the tender opening process.

The opening of bids is done in accordance with the four-eyes principle and requires the involvement of two staff members who have been associated as Opening Staff (PO/OS) to the specific competition.

The actions which can be performed by the Opening staff are as follows:

- Unlock list of submitted bids

- Add offline received bids

- Disregard / reject incorrect bids

- Approve the list of received bids.

- Generate Tender / Bid opening Report / record.

For each tender competition, the Tender Coordinator identifies the Opening Committee consisting of two (2) Opening Staff (PO/OS) members. These roles are defined during the tender creation process, however the staff can be changed at any time prior to the tender opening. Associated PO/OS are sent opening tasks reminder notifications twenty four (24) hours and one (1) hour prior to the tender opening date and time.

After expiry of the specified tender opening date and time, the system automatically grants appropriate access rights to the opening staff, in order to unlock the electronically submitted tenders. The Status of the tender competition will now be "Awaiting bid opening". An "Unlock bid" task will also be displayed in the task list of the associated opening staff.

Once the 1st PO/OS officer has confirmed the bids received, the process moves to the 2nd PO/OS officer who will either accept or reject the list of confirmed bids. In the latter case (rejection), the flow will revert to the first officer to conduct a review of the submitted bids.

The duty performed by the 2nd Officer in the tender opening process, is primarily one of providing confirmation of duties carried out by the first opening officer, in keeping with the four-eyes principle.

Upload of Offline Bids:

The system allows for the upload of bids which may not have been received electronically within the system using the bid submission tool. Where bids have been received in electronic format by other means (email etc.) prior to the stipulated submission deadline and where consultation was done with the Ministry of Finance the Tender Coordinator may choose to upload the received bids using the system provided functionality.

This upload has to be done as part of the tender opening process and must be carried out by the first tender opening officer. It is important to note that any Bidder for which an offline bid is being uploaded, must exist as a registered and active supplier in the system.

Tender Opening Record / Report:

The system generates a Tender Opening Record (Report) on completion of the Bid unlocking exercise. On completion of the system opening job, a "Download" link appears on the "Bid opening space" of the second opening officer and clicking on this "Download" link will allow this officer to open the Tender opening record". The Tender Opening record can be downloaded by either the Tender Coordinator (PO/TC) or associated opening officers (PO/OS).

7.2 Process

This section of the chapter provides instruction on the steps to execute Bide Opening tasks.

7.2.1 Unlock Bids - 1st Officer

When the unlocking date and time has been reached, one of the associated Tender Opening Staff (PO/OS users) will need to login and execute the bid unlocking task using the following steps:

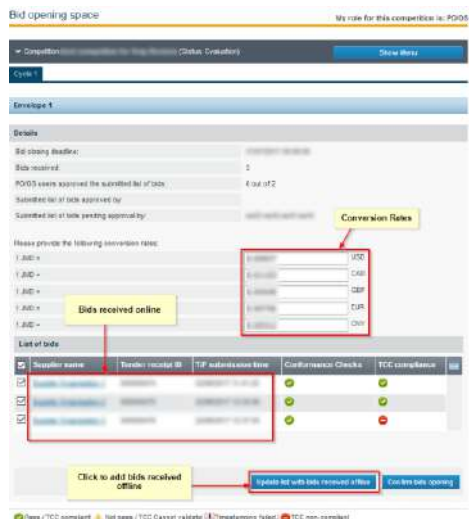1. Select the "Unlock bid" task (for tender competition of interest) from the "Task list" page

FIGURE 7-1: Homepage Task List

2. Review the information shown in the "Bid opening space" page:

FIGURE 7-2: Bid opening space page

3. Take necessary action which may be to:

- Update of Foreign Currency Rate of Exchange - If required, enter updated or current exchange rate for the listed foreign currency tender types. This may be required only if bids are expected to be submitted in foreign currency amounts and there needs to be an equivalent Jamaican dollar amount defined at opening time.

- Update list with Bids received offline - In the event of any Bids being received offline, select the "Update list with Bids received offline" button to access the functionality for adding such bids as detailed in Add Offline Bids section.

- Confirm Bids opening - Select the list of Bids to be opened by selecting the "Check box" next to the name of the Supplier. To select all Suppliers, select the "Check box" in the header row. Once the Bids have been selected, Select the " Confirm Bids opening" button to confirm the selected bids to be opened.

Once the first opening officer duties have been completed, the flow will move to the second officer to complete the unlocking process. Refer to "Unlock Bids - 2nd Officer" on the next page.

7.2.1 Unlock Bids - 2nd Officer

To confirm Bid opening, the second officer will need to login and execute the bids unlocking task as follows:

1. Select the "Unlock bid" task (for tender competition of interest) from the Homepage "Task list".

FIGURE 7-1: Homepage Task list

2. Review the information shown in the "Bid opening space" page:

FIGURE 7-2: Bid opening space page

3. Take necessary action which may be to:

a. Reject list of bids - Select the "Reject list of bids" button, to reject one, more or all of the bids previously approved by the first opening officer.

b. View offline tenders - Select the "View offline tenders" button to view details of any Bids which may have been received offline and uploaded by the first opening officer.

c. Confirm Bids opening - Select the "Confirm Bids opening " button to authorize bids which were previously authorized by the first opening officer.

d. Download Tender opening record - Described below.

Once the opening is approved, the system (after a few seconds pass) will display the list of opened bids along with the report of the opening ceremony.

FIGURE 7-3: Bid opening space page - updated

Select the "Download" link to generate and open the "Tender opening record".

Associated Tender Evaluation committee members will be notified by email of the completion of the opening exercise so as to proceed with the evaluation of Bids. The Tender competition status will now be updated to "Evaluation".

7.2.1 Download Tender Opening Record

1. Select the Tender Competition using the "View Tender Competition details" on page 38 feature.

2. Select the "Bids" Menu option from the Competition Menu which opens the "Bids opening space" window.

FIGURE 7-1: Bid opening space with Download link

3. Select the "Download" link which will generate the Tender Opening record"

8 Tender Evaluation Management

8.1   General Information

This section of the chapter provides and overview of the Evaluation procedures and covers the following topics:

8.1.1 Evaluation Procedures overview

Bids evaluation is performed by the assigned Evaluation Committee members. The Evaluation phase commences on completion of the tender opening procedure, with a set of tasks to be performed by the Evaluation Committee and Tender Coordinator.

The flow of activities from tender opening through to contract award is as follows:
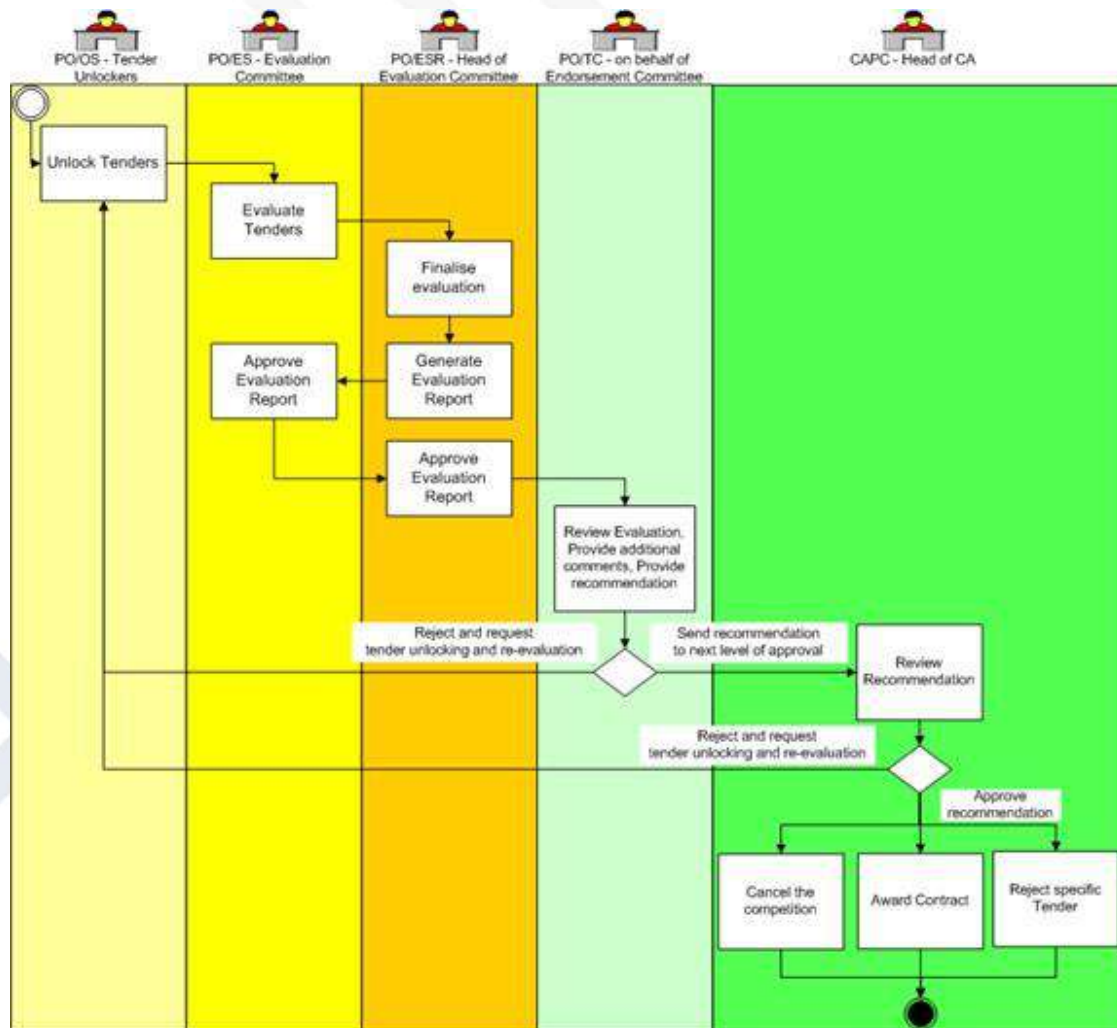
FIGURE 8-1: Evaluation procedure workflow

Evaluation Tasks:

The tasks to be completed by members of the Evaluation Committee and Procurement Coordinator are dependent on the tender procedure in use.

Tenders configured for Offline Evaluation procedure, in large part calls for the Download of Supplier bids, Input of the Evaluation Results and the Conclusion of the proceedings. In this case a task "Enter offline results" is initiated for the Tender Coordinator only.

On the other hand, tenders configured to use Online Evaluation procedures, calls for additional tasks to be performed in the system including the approval of system generated evaluation reports and so on. In this case, an "Evaluate bids" task is initiated for the assigned evaluator which allows them to:

a. Review the automated scoring performed by the system for each defined evaluation criteria.

b. Download bid documents.

c. Open each envelope (Eligibility, Technical and Financial) and populate the respective scores for each criterion.

d. The Evaluator Responsible user can track the status of the evaluation scoring for each associated evaluator user.

e. Compare Supplier responses.

f. Add general evaluation comments.

Evaluation Status:

A tender competition will have one of the following "Evaluation status" at a point in time:

- Not evaluated- At commencement of the Evaluation phase.

- Draft - The tender has been evaluated and saved as a draft. Further modifications are allowed.

- Final - The tender has been evaluated and saved as final. Further modifications are not allowed.
- Finalized - The tender has been evaluated and saved as final. The Lead Evaluator (PO/ESR) has approved all evaluations of the associated PO/ES users.

Evaluation Clarifications:

During the evaluation phase, the evaluation team of a competition may contact a supplier that has submitted a bid in order to request additional information and / or obtain clarifications for the bid. Refer to "Request Evaluation Clarification" on page 152 for details on the handling of evaluation clarifications.

Approval of Evaluation Report

For Online Evaluation procedures, once the evaluation results are populated in the system by committee users, the system will generate an Evaluation report. All committee users will need to approve the report in order for the system to proceed in concluding the evaluation process. An "Approve Evaluation report" task will be initiated for the users. Any Evaluator (PO/ES user) may upload an amended Evaluation Report, if deemed appropriate, instead of approving the one available. The new file will also need to be approved by the rest of the PO/ES and the PO/ESR users of the competition.

Evaluation conclusion

On completion of the entry of the evaluation results (for offline procedures) or the approval of the evaluation report (for online procedures), the head of the Procuring Entity (CAPC user role), will be required to authorize the evaluation process by providing the final approval. The user will have the ability to add comments per submitted bids and take into account the previous comments submitted by the evaluation committee

If deemed appropriate this user may reject the whole evaluation process and revert the flow back to the opening ceremony. A "Conclude evaluation" task will be initiated for the CAPC user.

Announcement of Evaluation Results

In keeping with the GOJ's procurement regulation, on conclusion of the evaluation proceedings, the evaluation results must be published and circulated to suppliers who participated in the competition. An "Announce evaluation results" task will be initiated for the tender coordinator (PO/TC) user.

Standstill Period

On completion of the "Announce evaluation results" task, the procurement proceedings will be halted, for a period of one (1) week, providing an opportunity for Suppliers who participated in the tender competition, to provide feedback regarding the management of the competition or to seek clarifications on the evaluation results. During this time any such Supplier will be able to provide feedback using the system's "Feedback" feature. The Tender Coordinator may also abort the "Standstill period" at anytime by using the " End standstill period" feature.

Post Standstill ranking

Feedback provided during the standstill period may result in the procuring entity having to revise the evaluation results (scores and or prices) which may result in a change in the original bid rankings. In such events, revised evaluation results and supplier ranking will have to be published.

In keeping with the procurement regulation, a post standstill ranking notice has to be circulated. On completion or termination of the standstill period the system will initiate the next task in the flow "Post standstill ranking".

8.1.1 Evaluation Tasks

	Task/ Step	Offline Procedure		Online Procedure	
		User Role	System Task	User Role	System Task
1	Download or Review Bids	PO/TC or PO/ESR	"Enter offline results"	PO/TC, PO/ES PO/ESR	"Evaluate bids"
2	Input Results & Finalize	PO/ESR	"Enter offline results"	PO/ES and PO/ESR	"Evaluate bids"
3	Finalize evaluation	N/A	N/A	PO/ESR	"Finalize evaluation"
4	Generate Evaluation Report	N/A	N/A	PO/ESR	"Generate evaluation report
5	Approve Evaluation Report	N/A	N/A	PO/ES	"Approve evaluation report"
6	Conclude Evaluation	CAPC	"Conclude evaluation"	CAPC	"Manage evaluation report"
7	Announce Results	PO/TC	"Announce evaluation "results"	PO/TC	"Announce evaluation" results"
8	Standstill Period	System	Standstill Period	System	Standstill Period
9	Answer	PO/TC	Respond to	PO/TC	Respond to

	Task/ Step	Offline Procedure		Online Procedure	
		User Role	**System Task**	**User Role**	**System Task**
	Standstill Feedback		Standstill Feedback		Standstill Feedback
10	Post Stand-still Ranking	PO/TC	"Post stand-still ranking"	PO/TC	"Post stand-still ranking"

8.2 Process - Offline Evaluation

This section of the chapter provides instructions on how to evaluate bids for tender competitions configured for Offline Evaluation.

8.2.1 Download Bids - Offline Evaluation procedure

Only the Tender Coordinator will have access to download Bid documents for Offline evaluation configured tenders.

1. Select the "Enter offline results" task from the Homepage Task List.

2. In the "Offline evaluation results" page, Select the download icon 📦 under the "Uploaded file" column to download the Bid document for each Supplier.
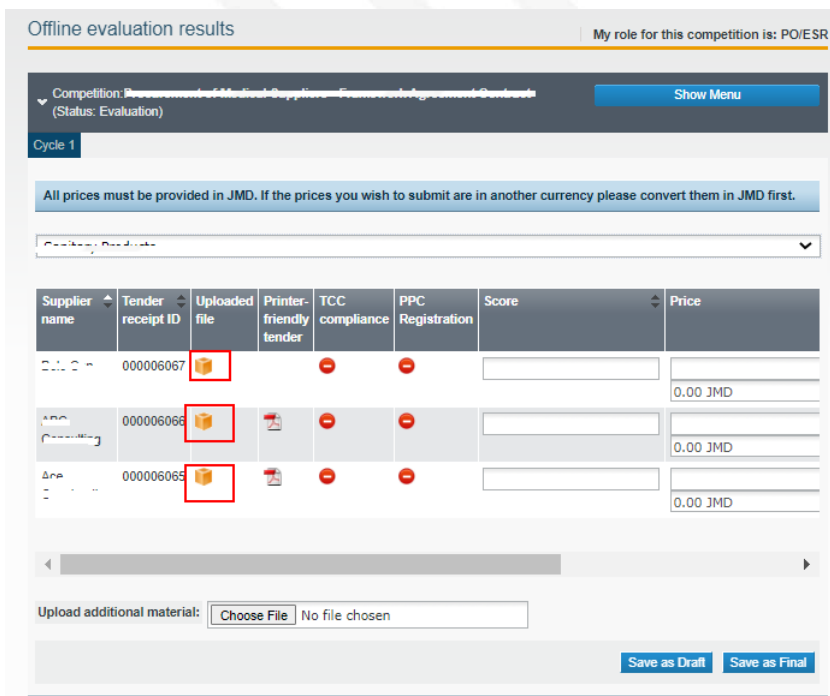
FIGURE 8-1:   Offline evaluation results page

3. Save the downloaded file with an appropriate name to your computer or server and send to members of the evaluation committee.

8.2.1 Input Results - Offline Evaluation procedures

1. Select "Enter offline results" task from the Homepage task list.

2. In the "Offline evaluation results" page, input the "Score" and "Price" information:
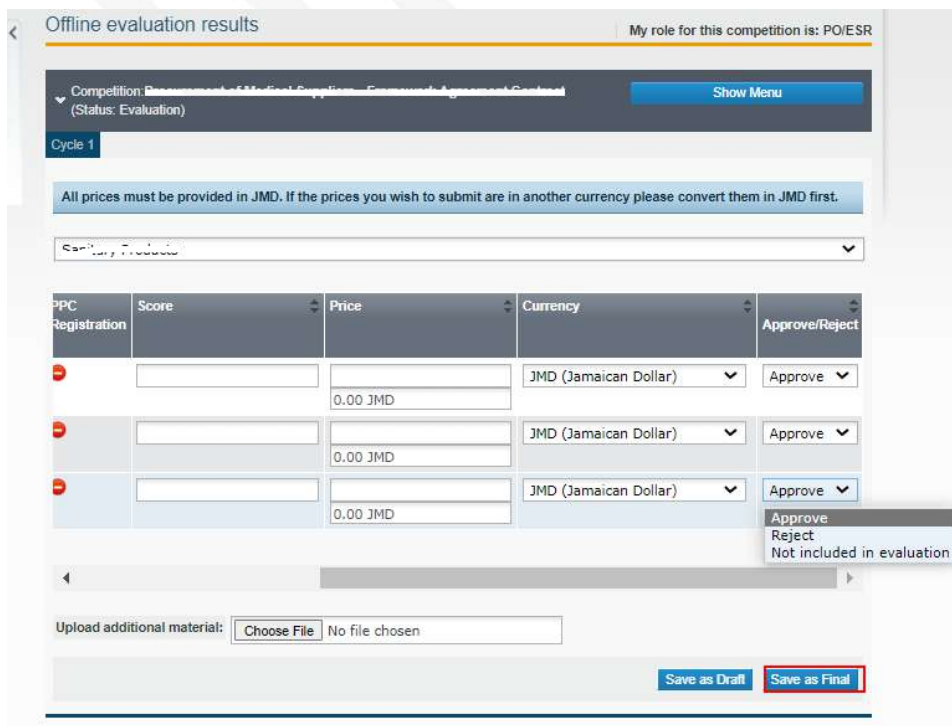
FIGURE 8-1:   Offline evaluation results page

3. Select the appropriate option from the "Approve / Reject" column.

4. Select the "Save as Final" button to save results.
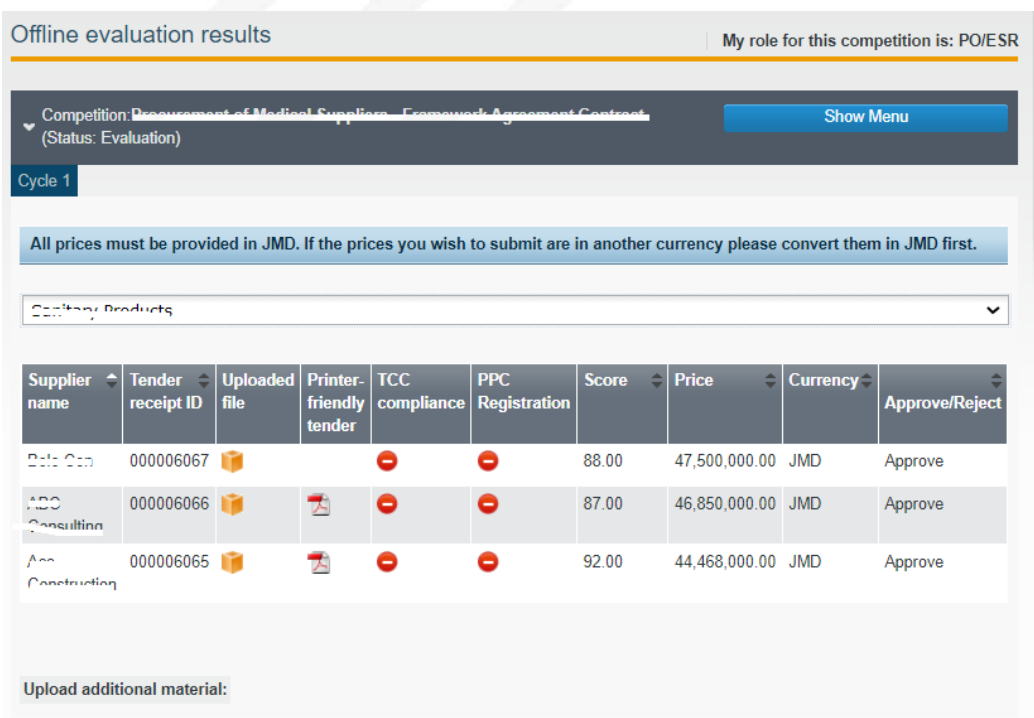
8.2.1 View offline evaluation results

Evaluation results for a tender competition configured using the Offline evaluation procedure can be view at anytime by the Tender Coordinator (PO/TC) or Evaluator Responsible user (PO/ESR). To view the results:

1. Select the Tender Competition using the "View Tender Competition details" on page 38 feature.

2. Select the "Show Menu" button then Select "View offline evaluation results" menu option.

   The results will be displayed in the "Offline evaluation results" page.

FIGURE 8-1: Offline evaluation results page

8.3 Process - Online Evaluation

This section of the chapter provides instructions on how to evaluate bids for tender competitions configured for Online Evaluation.

8.3.1 Download Bids - Online Evaluation procedure

Each member of the system defined Evaluation committee has access to download the Bid documents as follows:

1. Select the "Evaluate Bids" task from the Homepage Task List. The opened "View bids" page displays the Eligibility, Technical and Financial envelopes supplier submissions.
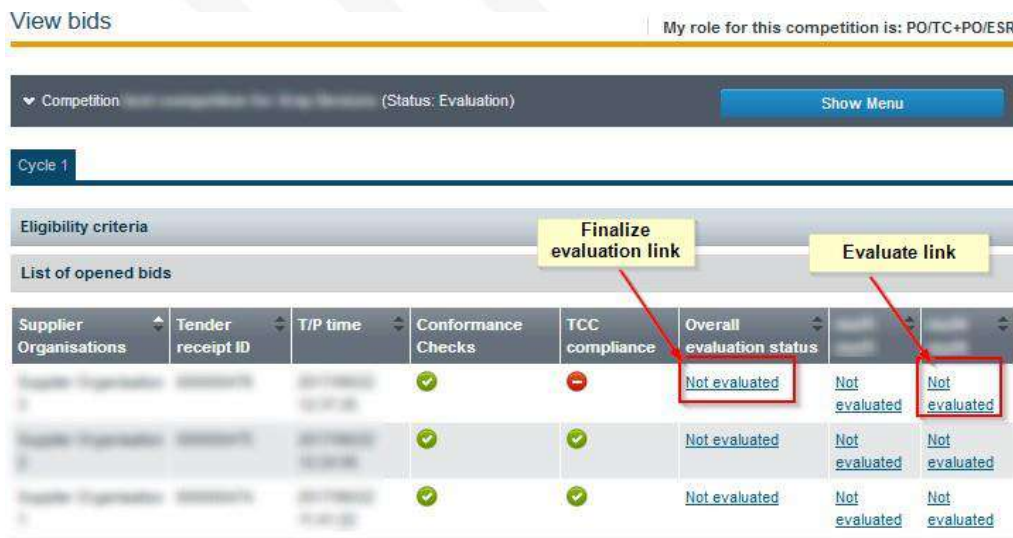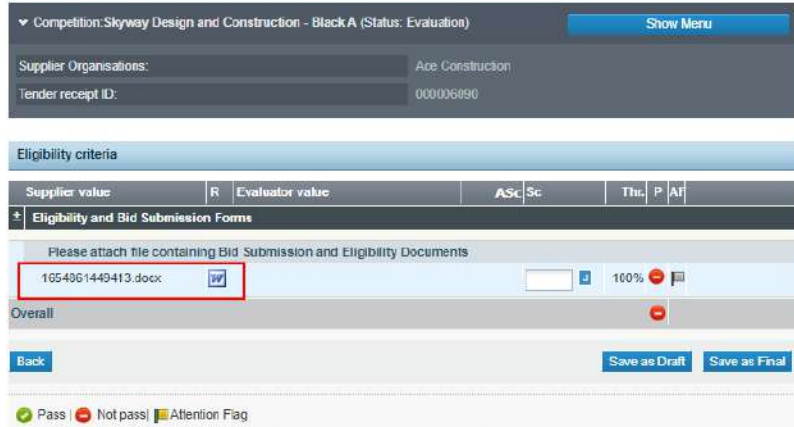
FIGURE 8-1: View bids page

2. Select the "Not evaluated" link which opens the "Bid evaluation page" containing the uploaded bid document

Bid evaluation page | My role for this competition is: PO/ES

⌄ Competition:Skyway Design and Construction - Black A (Status: Evaluation)		Show Menu
Supplier Organisations:	Ace Construction	
Tender receipt ID:	000006090	

Eligibility criteria

Supplier value	R	Evaluator value	ASc	Sc	Thr.	P	AF	
± Eligibility and Bid Submission Forms								

Please attach file containing Bid Submission and Eligibility Documents

1654861449413.docx	🔲			🔲	100% ⛔ 🏳
Overall					⛔

Back				Save as Draft	Save as Final

✅ Pass | ⛔ Not pass | 🟨 Attention Flag

FIGURE 8-2:   Bid evaluation page

3. Select the Document to download it.

4. Repeat these steps for each Supplier Bids for each envelope.

8.3.1 Input, Update Results - Online Evaluation procedure

The System will where possible, automatically generate scores for Suppliers response to define evaluation criteria. The evaluation committee may however wish to input or override system generated scores based on their assessment of the suppliers bid response or supporting documents. To input or update the scores:

1. Select he "Evaluate Bids" task from the Homepage Task List. The opened "View bids" page displays the Eligibility, Technical and Financial envelopes supplier submissions.

FIGURE 8-1: View bids page

2. Select the "Not evaluated" link which opens the "Bid evaluation page" which displays the derived score and or allows for input of the score for the evaluation criteria.

   a. Input the results (scores) in the field section provided. If the score is greater than or equal to the defined criteria threshold, the "Pass" icon will be enabled.

   b. Select the "J" icon to input a justification narrative if required.

FIGURE 8-2: Bid evaluation page

3. Select the "Save as draft" or "Save as Final" button to save results. Results saved as Final cannot be changed, except the entire evaluation procedure is redone.

4. Select the "Back" button to return to the "View bids" page.

5. Repeat for each envelope defined criteria for all Supplier bids until the scores are in a "Finalized" status.

8.3.1 Finalise Evaluation Results - Online Evaluation procedure

Once all the Evaluation results have been populated for Lots (if applicable), Envelopes and defined criteria by the evaluation committee, the Lead Evaluator user (PO/ESR) is required to "Finalize" the results. For each criteria, the Lead Evaluator shall:

1. Select the "Not evaluated" link under the "Overall evaluation status" column of each criteria.

FIGURE 8-1:   View Bids page

2. In the "Finalise eligibility criteria evaluation" page, make one of the following selections:

FIGURE 8-2: Finalise eligibility criteria evaluation page

a. Discard evaluation - To discard the results of one or more assigned evaluators. If discarded, the result will not be taken in the overall score of the tender.

b. Re-evaluate Bid - To instruct the re-evaluation of the tender by the selected member of the Evaluating staff.

c. Finalise Evaluation - To accept the results and save as Final.

3. Select the "Back" button to return to the 'View bids' page and repeat the procedure for all defined evaluation criteria.

On completion of the Finalization tasks, the system will generate an Evaluation report.

8.3.1 Generate Evaluation Report - Online Evaluation procedure

1. Select the "Generate Evaluation Report" task from the Homepage task list or by selecting the "Generate evaluation report" button in the 'Ranking' page.
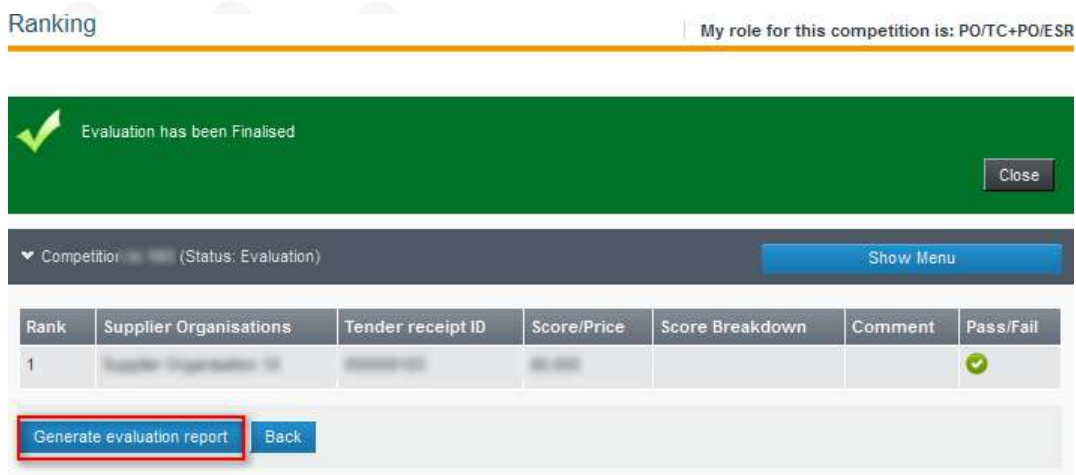
FIGURE 8-1: Evaluation Ranking page
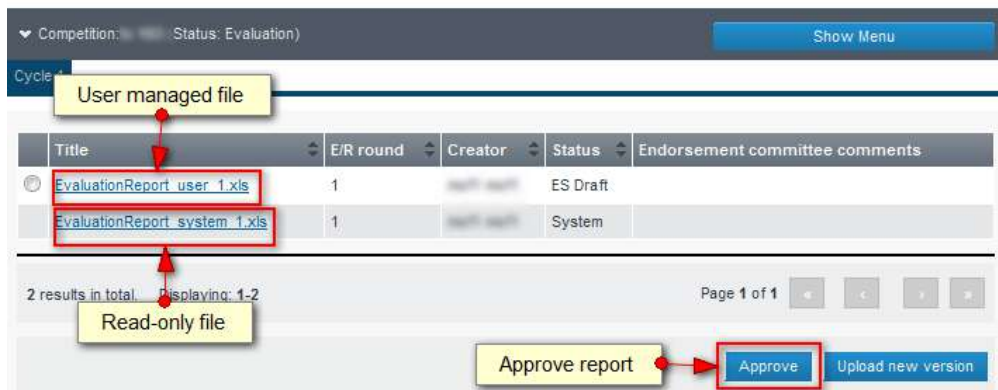
2. The "Manage evaluation reports" page will open and displays two version of system generated evaluation report

   a. . A 'Read only" version which cannot be modified by the user and maintained for audit purposes.

   b. A "User managed' version, which can be replaced with a formal evaluation report prepared by the Tender Coordinator or Evaluation staff.

A task "Approve evaluation report" will be initiated for each member of the Evaluation staff to approve the "User managed" version of the Report

FIGURE 8-2:   Manage evaluation reports page

The Lead Evaluator may download the Report by clicking on the Report title or may choose to upload a new version of the "user managed' file.

The Evaluation reports are available for view in the "Manage evaluation report" page and will need to be approved by all Evaluators (PO/ES) as well as the Lead Evaluator (PO/ESR) users associated with the competition.

8.3.1 Update, Approve Evaluation Report - Online evaluation

1. Select the "Approve Evaluation report" task from the Homepage task list or Select the "Evaluation report" menu option.

2. In the "Manage evaluate reports" page, take one of the following actions:
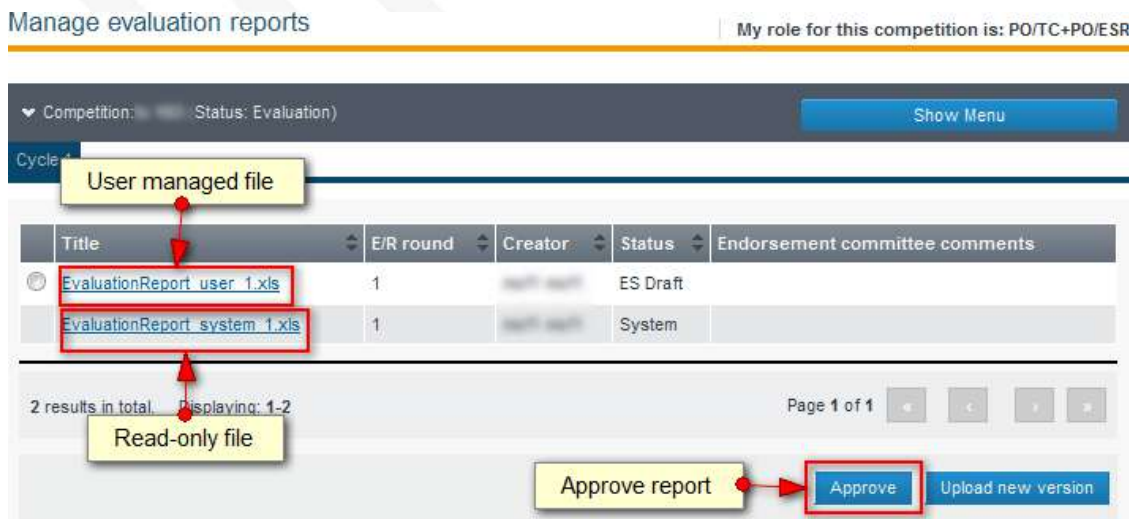
FIGURE 8-1:   Manage evaluation reports page

a. Select the "User managed' version of the system generated Evaluation Report to download it for review.

b. Select the "Upload new version" button to replace the system generated report with a formal copy of the Evaluation report prepared by the Procuring Entity.

c. Select the "Approve report" button to approve the Evaluation Report. This action must be done by each of the associated Evaluation committee user.

8.4 Process - Evaluation Finalization

This section of the chapter provides instructions on tasks to be executed for the finalization of the evaluation procedure for both Offline and Online evaluation.

8.4.1 Conclude Evaluation

To conclude the evaluation process, the head of the Procuring Entity (CAPC user role) shall:

1. Select the "Conclude evaluation" task from the Homepage task list.

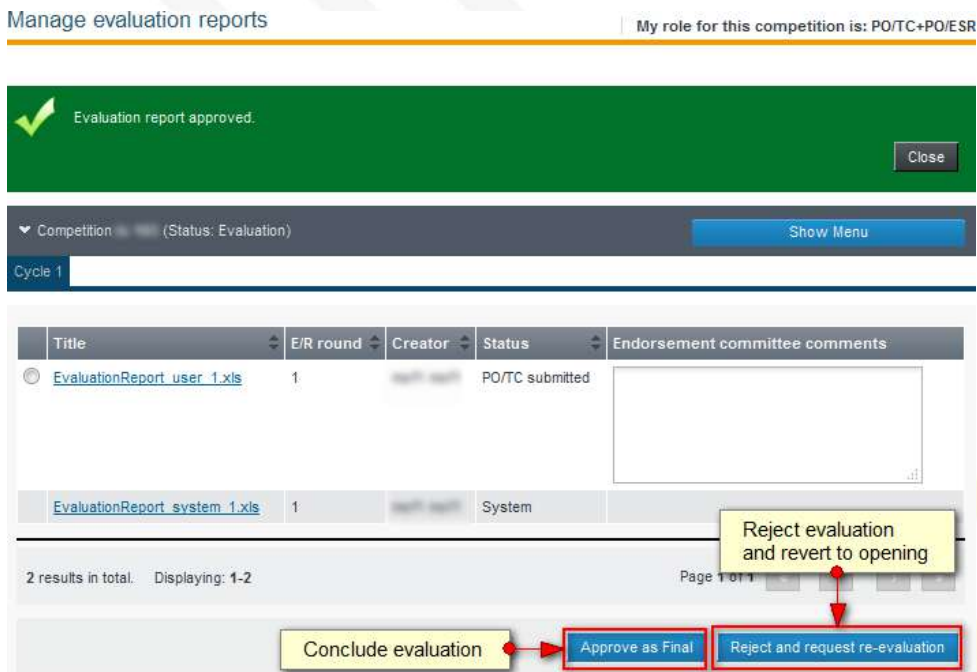2. In the "Manage evaluation reports" page, take one of the following actions:

FIGURE 8-1:   Manage evaluation reports page

a. Select the "Approve as Final" button to approve and Conclude the evaluation process or

b. Select the "Reject and request re- evaluation" button in the event of a need for the evaluation to be redone.

8.4.1 Announce Evaluation Results

To announce the results:

1. Select the "Announce results" task from the Homepage task list.

2. In the "Announce evaluation results" page, provide the relevant information

FIGURE 8-1: Announce evaluation results page

   a. Message - Provide a brief narrative of the results.

   b. Supplier Organization attachment - Attach a file containing a summary narrative of the results with content specific to the listed supplier.

   c. Common attachment -Attach a file containing summary narrative of the results which is sent to all the participating suppliers.

3. Select the "Send" button to have the message sent to suppliers participating in the competition in keeping with the GOJ procurement regulations.

Completion of the "Announce Evaluation Results" task, triggers to commencement of the Standstill period.

8.4.1 View Suppliers Evaluator Ranking

The Evaluation results can be viewed by either the Tender Coordinator (PO/TC) user or the Lead Evaluator (PO/ESR) user and is displayed in the "Ranking" page.

1. Select the Tender Competition using the "View Tender Competition details" on page 38feature.

2. Select the "Supplier Ranking" menu option from the Competition Menu.

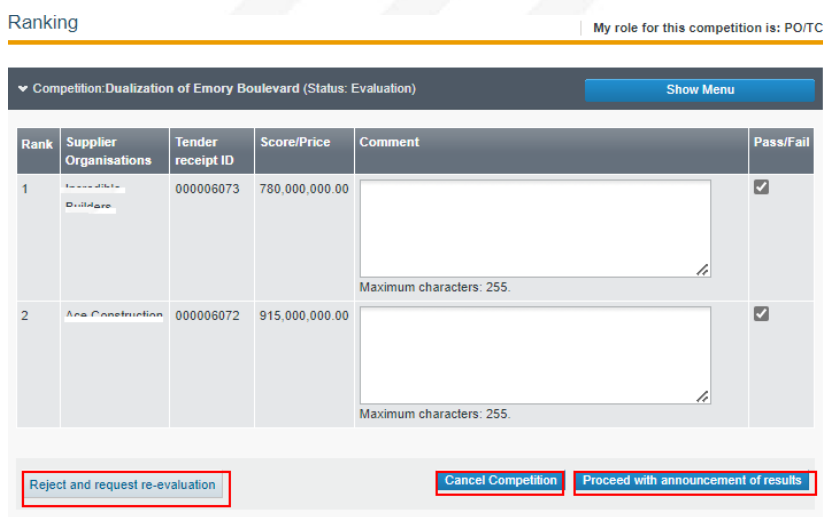3. The "Ranking" page displays the evaluation results sorted by Evaluation Score for each Lot (If applicable).

FIGURE 8-1: Ranking page

4. The "Ranking" page also provides options to
   a. Reject and request re-evaluation of the competition
   b. Proceed with announcement of results
   c. Cancel the tender competition.

8.4.1 Respond to Standstill Feedback

In the event Feedback or queries are raised by Bidders during the Standstill period, a "Respond to Supplier comment" task will be initiated for the Tender Coordinator. To Respond:

1. Select the "Respond to Supplier comment" Task from the Homepage Task List.

2. Select the feedback to be viewed or responded to in the "Feedback section" page:
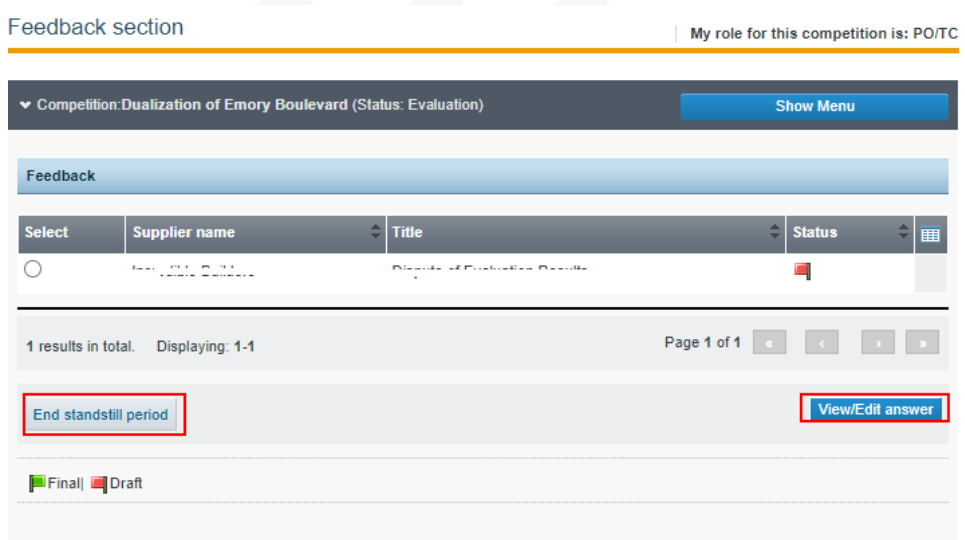
FIGURE 8-1: Feedback section page

3. In the "View / Edit answer" section of the page, provide response to the feedback query. Select the "Final" radio button option and then Select the "Send request" button. The status flag will be changed to a green colour.
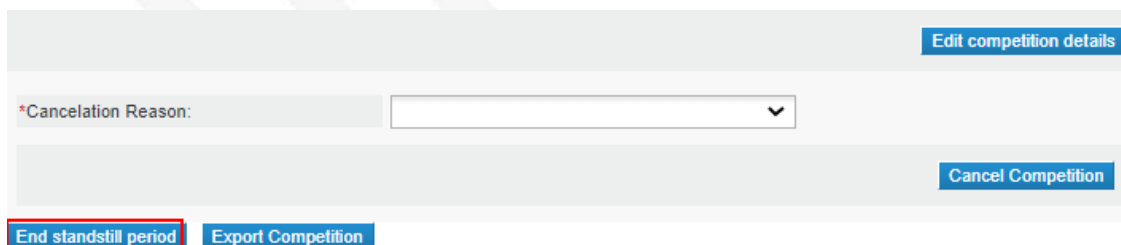
FIGURE 8-2: Feedback View / Edit answer page

4. The Standstill Period can also be terminated by selecting the "End standstill period" button in the "Feedback section" of the page.

8.4.1 End Standstill Period

1. Select the Tender Competition using the "View Tender Competition details" on page 38feature.

2. Select the "End standstill period" button at the bottom of the "View competition details" page.

FIGURE 8-1: End Standstill period section

3. Once done, the system will initiate the "Post standstill Ranking" task.

8.4.1 Post Standstill Ranking

On completion of the Standstill period, the system will initiate a "Post standstill ranking" task for the Tender Coordinator to update the evaluation results if so required. This is provided in the event of any change in the evaluation results or ranking based on feedback provided during the standstill period.

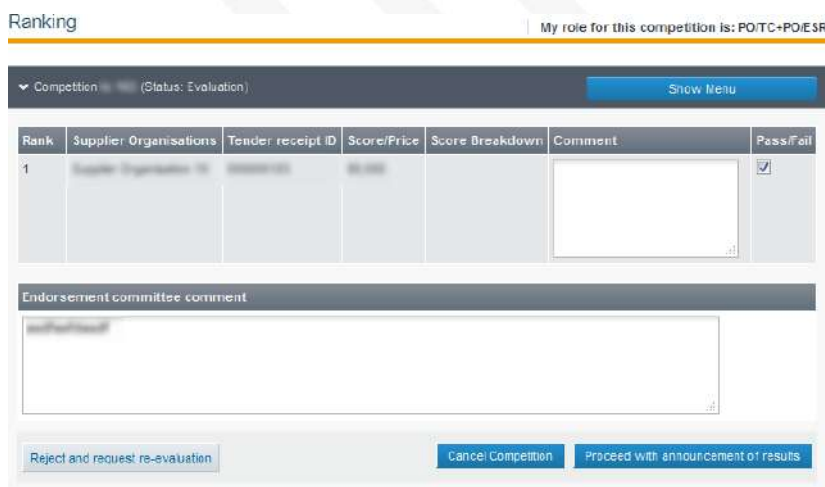1. Select the "Post-standstill ranking" task from the Homepage task list which opens the updated "Ranking" page.

FIGURE 8-1:   Ranking page

2. The "Ranking page" provides the Tender Coordinator with options for the following actions:

   a. Select the "Save" button to accept the results / ranking as displayed.

   b. Select the "Check box" under the "Pass/Fail" column to "Enable/Disable" a Suppliers Bid if required.

   c. Select the "Save" button to accept the results and conclude the post standstill activity.

   d. Select the "Reject and request re-evaluation" button to have the evaluation procedure redone.

9 Contract Awarding and Contract Management

9.1 General Information

This section of this chapter covers the following topic:

9.1.1 Contract Awarding

The tender competition proceedings culminate with the awarding of a contract to the preferred bidder / s.

Once the Evaluation report is approved, the result is announced and the standstill period ends, the Tender Coordinator (PO/TC) will proceed to the Awarding phase. The "Award contract" task will be initiated for the tender coordinator.

An "Award" button will also be activated on the "View Competition details" page.
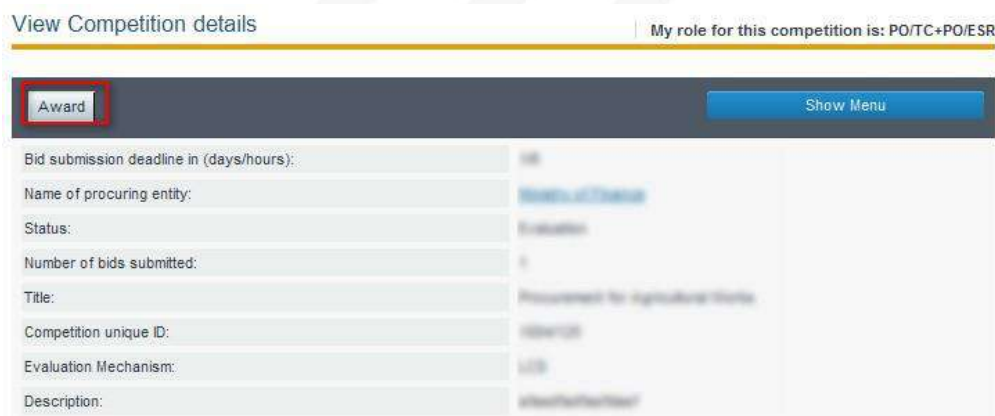
FIGURE 9-1: View Competition details page

Once the awarding of contracts is finalized the user may proceed in the creation and publication of the Contract Award Notice. A respective task will be available in the user's task list.

On completion of the contract awarding and publishing activities, the Tender Coordinator (PO/TC) user is by default assigned contract management duties. The Tender Coordinator has the option to add a user to take over the responsibilities of contract administration, with primary duties to update the contract performance details as required throughout the life of the contract.

The sequence of Contract Awarding and Contract Management tasks are as follows:

9.1.1 Contract Award and Management Task List

	Task	System Initiated Task	Responsible User
1	Establish Framework Agreement (If applicable)	"Conclude Framework Agreement"	Tender Coordinator (PO/TC)
2	Award Contract	"Award Contract"	Tender Coordinator (PO/TC)
3	View, Reply to Supplier Contract Award Response	"Reply to Feedback"	Tender Coordinator (PO/TC)
4	Create and Publish Contract	"Publish Contract Notice'	Tender Coordinator (PO/TC)
5	Assign or Replace Contract Manager	None	Tender Coordinator (PO/TC) or Assigned Contract Manager
6	Update Contract Performance Information	None	Assigned Contract Manager

9.2 Process

This section of this chapter provides instructions on tasks related to Contract Awarding and Contract Management and covers the following topics:

9.2.1 Award Contract

To award contract, the Tender Coordinator (PO/TC) shall:

1. Select the "Award contract" task from the Homepage task list or Select the "Award" button on the "View Competition details" page.

2. In the "Awarding" page, the user shall define the contract(s) value to be awarded to the successful supplier(s) by Lots (if applicable).

FIGURE 9-1:   Awarding page

- The user shall Input or select information for Supplier, Lots, CPV code and the contract value.

3. In the event of award to multiple Suppliers, Select the "+" button to add multiple contracts.

4. On completion, select the "Save" button.

9.2.1 View, Reply to Supplier Award Response

To review the response made by a Supplier in response to a contract offer:

1. Select the "Respond to Supplier Award Response" task from the Homepage Task List section.

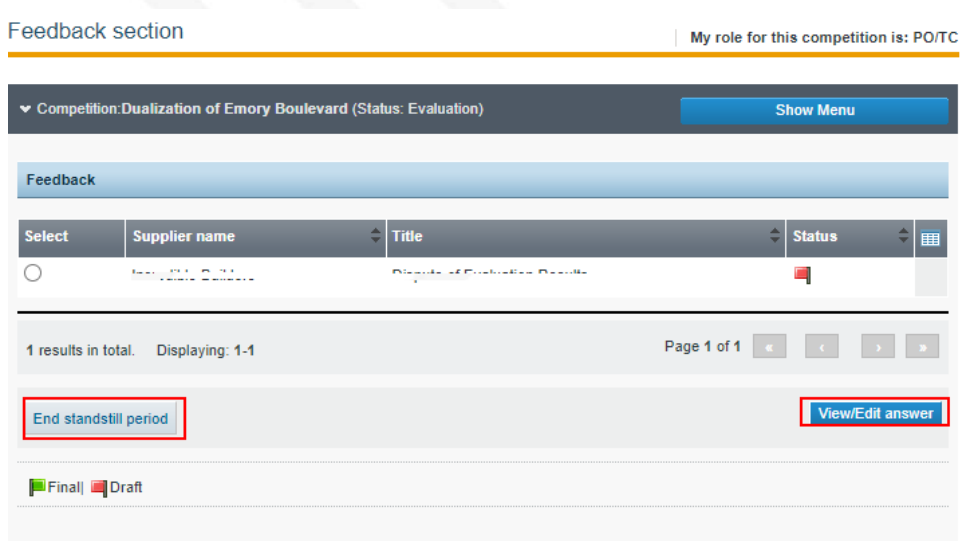   The "Feedback section" page will be displayed:

FIGURE 9-1:   Feedback section

2. Select the Supplier response of interest and then Select the "View/Edit answer" button to provide response.

3. The Standstill period may also be terminated by Selecting the "End Standstill period" button.

9.2.1 Create and Publish Contract Award Notice

1. Select the "Publish Contract Award Notice" task from the Homepage task list.

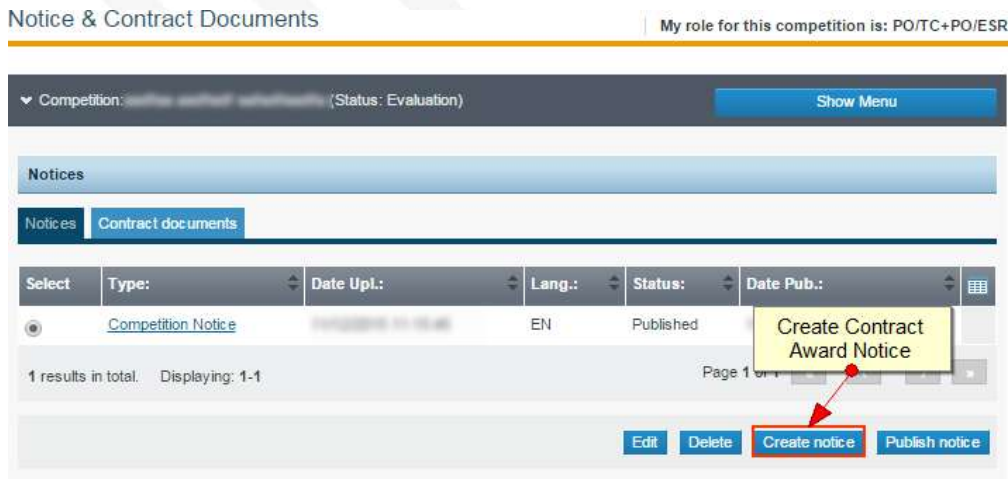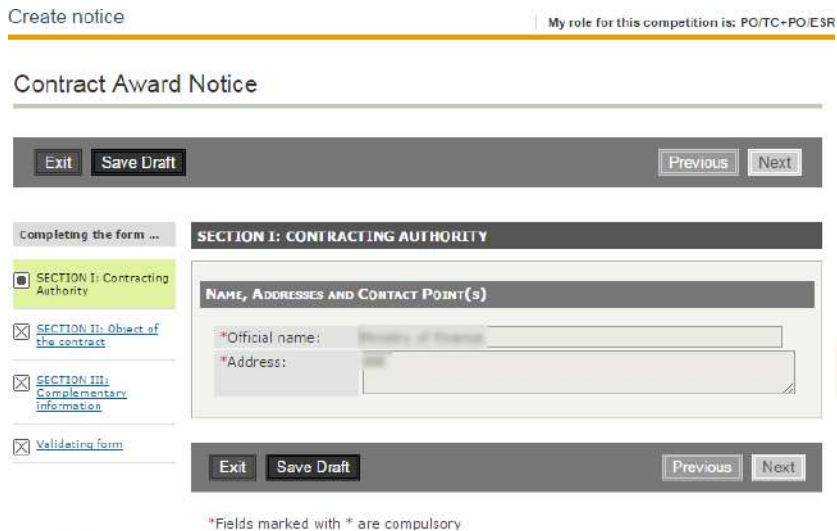2. In the "Notice & Contracts Award Notice" page, Select the "Create notice" button.

FIGURE 9-1:   Notice & Contract Documents page

3. Populate the necessary details in the "Contract Award Notice" form.

FIGURE 9-2:   Create Notice page

4. After all the details are populated, the user may save the notice as draft, by selecting the "Save Draft" button or save as final by selecting the "Save as Final" button. Any notice saved in final status is available for publication.

5. Publish the Notice by selecting the notice of interest from the "Notice & Contract Documents (Notices tab)" page and then select the "Publish Notice" button.
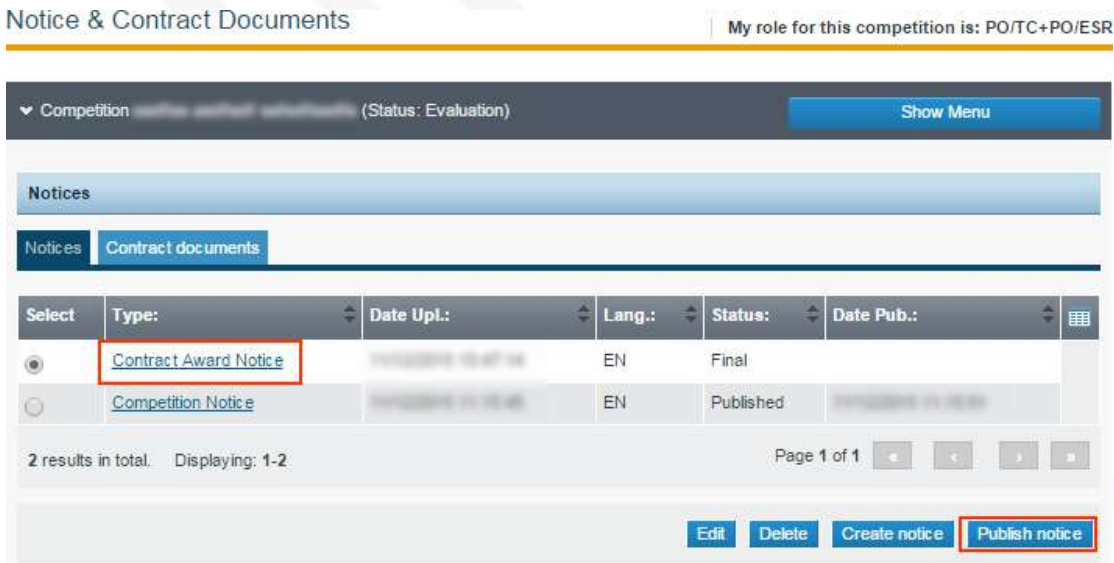
FIGURE 9-3:   Notice & Contract Documents page

9.2.1 View Contracts

1. Select the "PE Contracts" or "My Contracts" link from the "PE admin-istration" section of the Homepage.

2. The "PE Contracts" page lists the PE or User associated contracts.

FIGURE 9-1: PE Contracts page

3. To view the details of a specific Contract, Select the "View Contract" link which will open the "Contract" details page.

9.2.1 Assign or Replace Contract Manager

To Assign or Replace a Contract Manager:

1. Select the contract as detailed in the "View Contracts" on the previous page process.

2. Select the Competition Menu button, then select the "Associated Contract Managers" menu option. The "Associate / Disassociate Contract Managers" page will be opened.

FIGURE 9-1:   Associate / Dissociate Contract Managers page

3. Select the "Add Contract Manager" button to add an additional Contract Manager.

4. Select the "Disassociate" button to remove an associated Contract Manager.

.

9.2.1 Update Contract Performance Information

During the execution of contract activities, the assigned Contract manager is expected to populate the contract tool with contract execution details, like payments, issues, complaints, variances etc. and attachment of relevant documents.

To update contract performance details, the associated and designated" Contract Manager", shall:

1. Select the contract of interest, Refer to: "View Contracts" on page 62.

2. Select the "Edit Contract" button.

3. Input the necessary details or information.

4. Select the "Save contract" button.

10 Framework Agreements

10.1 General Information

This section of this chapter provides an overview of Framework Agreements.

10.1.1 Framework Agreement overview

The system provides functionality for management of Framework Agreement procurements. A Framework Agreement (FA) is an agreement between a Procuring Entity and one or more suppliers that recognizes that the parties have not come to a final agreement on all matters, but will agree on final details in the future.

To establish a Framework Agreement, It is the norm for a pre-qualification procurement to be initiated by means of a tender competition and the Tender Coordinator is required to make a few additional configuration steps or tasks to allow for this. These configuration / tasks include

1. Enabling the option for "Framework Agreement Establishment" in the tender competition workspace definition page and to:

2. Conclude the Framework Agreement as part of the contract award procedures.

The Procuring Entity performs the evaluation of the received bids, to determine which suppliers are qualified to take part in the FA. The qualified Suppliers then constitute a pool of Suppliers from which the Procuring Entity may purchase, without having to go through an all-encompassing procurement routine.

During the completion of the contract awarding procedure the Procuring Entity will be able to define special contractual terms like:

1. Procuring entities which may purchase against the FA.

2. FA Contract Beginning and End dates:

NOTE: The current version of the system only supports "Closed Framework Agreement" which means that once the terms (FA End date and participating PEs) are defined at establishment, these cannot be changed during the tenure of the agreement

For tender competitions which were configured to create a Framework Agreement, a task to "Conclude Framework Agreement" will be initiated for action by the Tender Coordinator, at the end of the Standstill period and just prior to the Contract award process.

After the establishment of the FA, the Procuring Officer can create at anytime a "Mini-competition" for a specific purchase and invite the Suppliers from the pool Suppliers party to the FA, to submit a quote for a particular purchase. Alternatively, a participating Procuring Entity may place a direct order to one of the pre-qualified Suppliers.

Suppliers are also allowed to execute purchase for e-Catalogue items as part of a Framework Agreement setup.

10.2 Process

This section of this chapter provides instruction on the execution of tasks related to the management of Framework Agreements.

10.2.1 Establish Framework Agreement

The Tender Coordinator shall:

1. Select "Conclude Framework Agreement" task from the Homepage Task List.

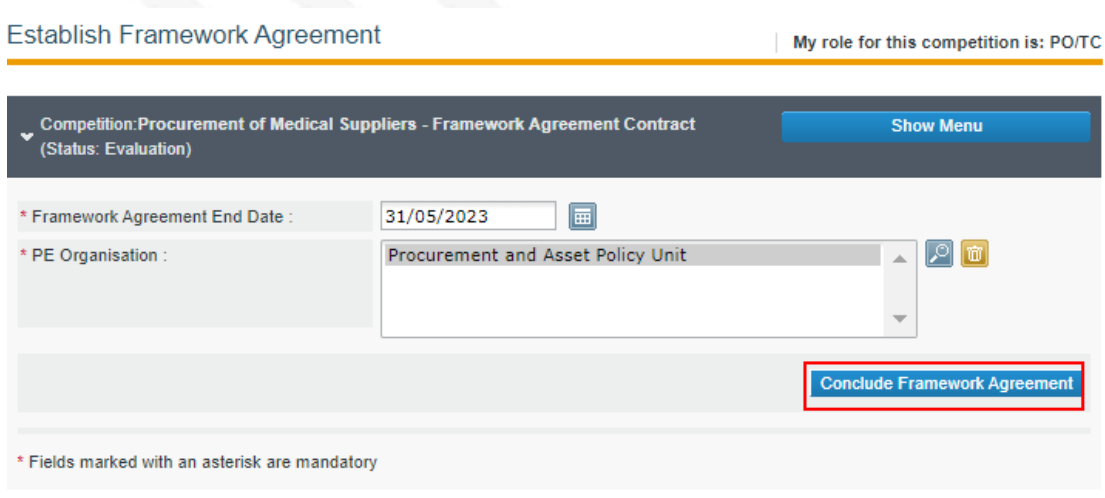2. In the "Establish Framework Agreement" page, populate the following details:

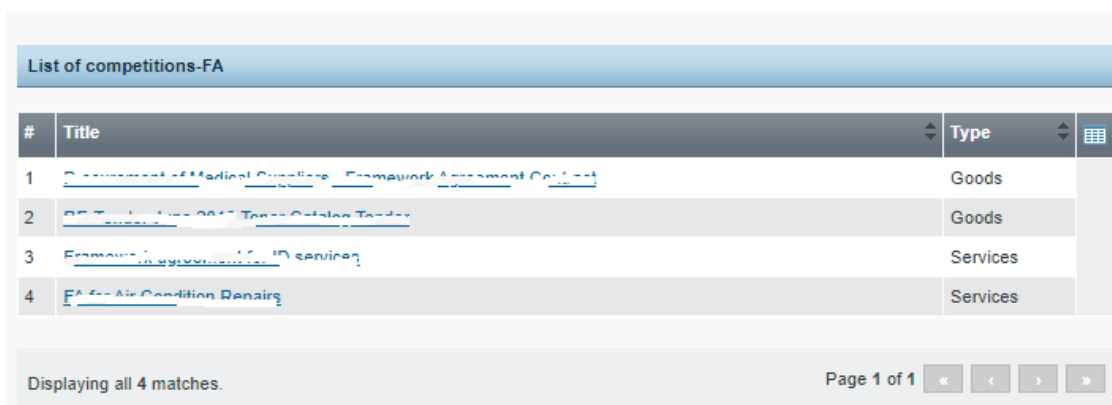FIGURE 10-1: Establish Framework Agreement page

a. Framework Agreement End Date - The FA contractual end date.

b. PE Organization - Select the Search icon to add Procuring Entities that will be allowed to participate (run Mini-competitions) for this FA.

3. Select the "Conclude Framework Agreement" button, to establish the FA.

10.2.1 View List of Framework Agreements

1. Select the "List of Framework Agreements" link from the "Competition management" section of the Homepage.

2. The "List of Framework Agreement" page opens and presents a list of FAs to which the Procuring Entity is associated with based on the established Framework Agreement.

List of Frameworks

#	Title	Type
1	Procurement of Medical Supplies - Framework Agreement Contract	Goods
2	PE Tender June 2017 Toner Catalog Tender	Goods
3	Framework agreement for ID services	Services
4	FA for Air Condition Repairs	Services

Displaying all 4 matches.   Page 1 of 1

FIGURE 10-1:   List of Framework Agreements page

3. Select the "Title" of the FA of interest to seethe detail of the tender competition which established the FA.

10.2.1 Run Framework Agreement Mini-Competition

1. Select the Framework Agreement of interest using the"View List of Framework Agreements" on the previous page process.

2. In the "View Competition details" page, Select the Competition Menu, then Select the "Mini-competitions" menu option which opens the "List of all Mini-competitions" page.

FIGURE 10-1:   List of all Mini-competitions page

3. Select the "Create Mini-competition" button to execute a "Mini" Tender competition (equivalent to a Restricted Bid Tender competition) between the parties to the FA.

4. Select the "Create Manual Mini- competition" button to record procurement which would have been done against a Framework Agreement.

11 Tender Competition Archival

11.1 General Information

This section of this chapter covers the following topic:

11.1.1   Archiving overview

On completion of the Creation and Publishing of Contract for a tender competition, the system will initiate a task for the Tender Coordinator to create an Archive of the documents / artifacts of the proceedings.

This allows for the creation of compressed copies of the documents which can then be downloaded and stored electronically outside of the e- GP System. This activity reduces the storage disk space used by the system and accordingly, Tender Coordinators are charged with carrying out this task, to ensure efficient and sustainable systems operations.

Once a tender competition has been archived, the details can only be accessed in the system through the "List of archived Competitions" link on the Homepage and then the artifacts can be download as a compressed file.

11.2 Process

This section of this chapter provides instructions on the execution of tasks for archival of tender competitions.

11.2.1 Archive Tender Competition

The Tender Coordinator shall:

1. Select the "Archive Competition" task from the Homepage Task List.

2. In the "Archive Competition" page, Select the "Confirm" button.
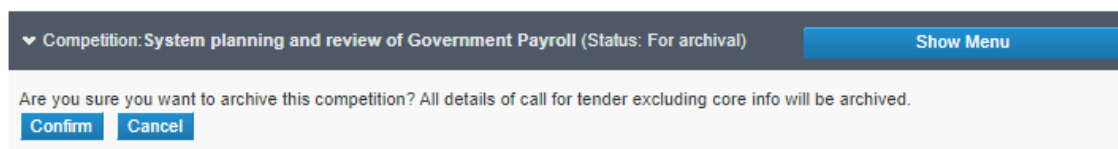

Archive Competition

▾ Competition:**System planning and review of Government Payroll (Status: For archival)**   **Show Menu**

Are you sure you want to archive this competition? All details of call for tender excluding core info will be archived.
Confirm **Cancel**

FIGURE 11-1:   Archive Competition page

The System will begin a process of compressing the competition artifacts / documents so that they can be exported as a single compressed / zip file

The User may need to periodically Select the "Refresh" button to see if the archival job is still in-progress as it may take a few minutes depending on the number and size of documents.

3. On completion of the archival process, a "Download Competition" button will be enabled on the "View Competition details" page.
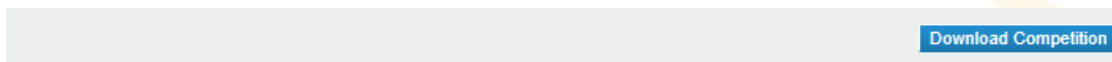

Download Competition

FIGURE 11-2:   Download Competition link

4. Select the "Download Competition" button to download the compressed file or files containing all of the competition's documents.

Once the tender competition has been archived, the details can only be accessed (downloaded) via the "List of archived Competitions" option.

11.2.1 List, Download Archived Tender Competitions

1. Select the "List of archived Competitions" link from the "Competition management" section of the Homepage.
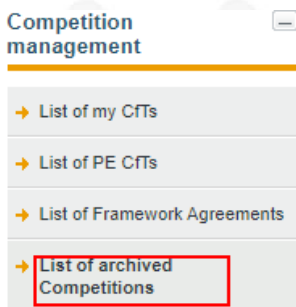
FIGURE 11-1: List of archived Competitions link

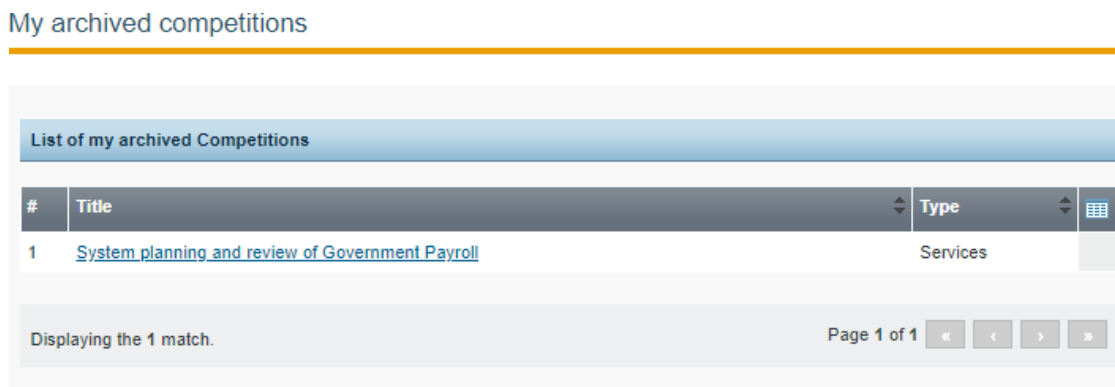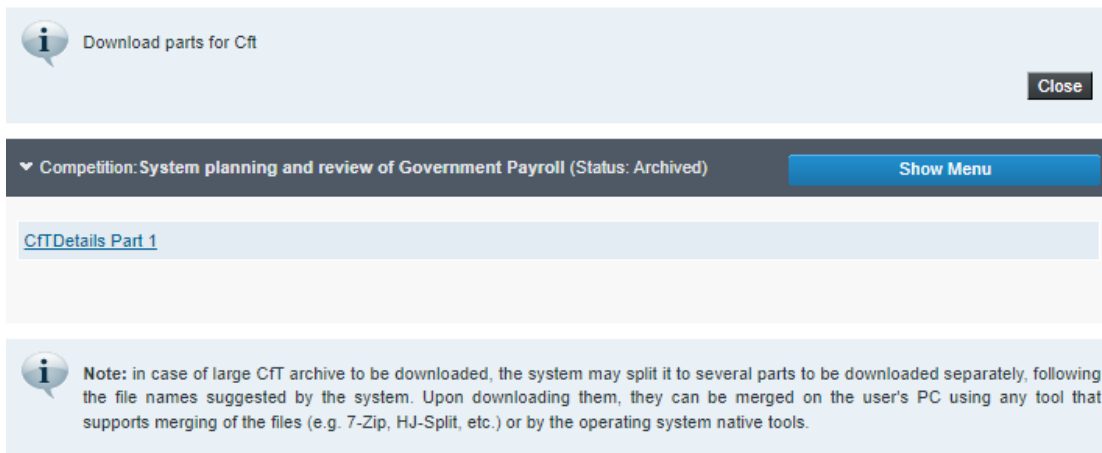2. The List of archived competitions is displayed in the "My archived competitions" page:

FIGURE 11-2: My archived Competitions page

3. To Download, Select the tender competition of interest from the List which opens the "Download parts of CfT" page.

4. Select the "CfTDetails..." link to initiate the download of the compressed file to your computer.

Download parts for Cft

FIGURE 11-3: Download parts for CfT page

5. Save the file to your device of choice.

12 Reporting, Manuals etc

12.1   Reports

This section of the chapter covers the following topics:

12.1.1 Current Competition List

To obtain a list of tender competitions:

1. Select the "Current competitions" link from the "Information" section of the Homepage.

2. List of tender competitions will be displayed in the "Simple search" page.

FIGURE 12-1:   Competition simple search page

3. Select the "Title" of the competition of interest to see further which will be shown in the "View Competition details" page.

12.1.1 Open Bid Details

To view a Tender Opening Record / Report:

1. Select the "Opened bid details" link from the "Information" section of the Homepage.

2. The "Competition of opened bids" page displays list of tender opening records.

Competitions of opened bids

#	Title	Reference number	PE	Bids submission deadline	Procurement Method	Opened bids	Award date	Status
1	~~...~~ Supply and ~~...~~ Copy Paper	1820/165	Test Department	27/05/2022 15:00:00	Open - NCB	View opened bids		Established
2	~~...~~ of Emergency ~~...~~	1429/93	Procurement and Asset Policy Unit	31/05/2022 14:00:00	Restricted Bidding (RB)	View opened bids		Evaluation
3	Procurement of Medical Supplies – Framework Agreement Contract	1429/92	Procurement and Asset Policy Unit	19/05/2022 14:00:00	Open - NCB	View opened bids		Evaluation

FIGURE 12-1:   Competitions of opened bids page

3. Select the " View opened bids" link of the competition of interest which will open the "Opened Bid details" page.

4. Select the "Download" link to Download the "Tender Opening Record" report.

12.1.1 Contract Award Notices

To see the details of contract award Notices:

1. Select the "Contract Award Notices" link from the "Information" section of the Homepage.

2. The "Contract Award Notices" page lists all Contract Notices for all Procuring Entities.

FIGURE 12-1:   Contract Award Notices page

3. To see the details of a specific Notice, Select the "PDF" icon under the "Notice PDF" column for the competition of interest.
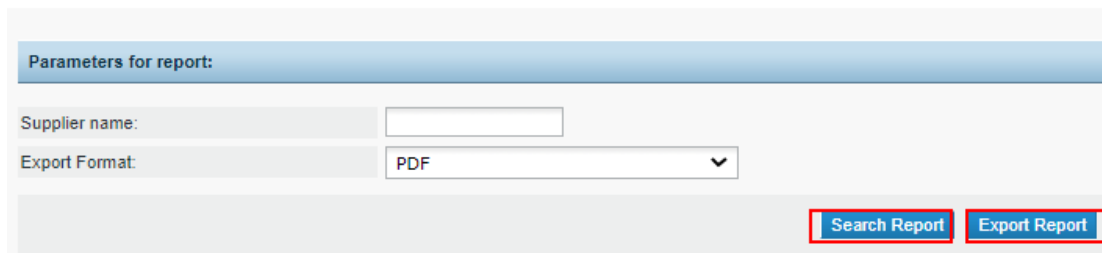
12.1.1 Supplier Listing

To generate a list or report of Suppliers registered on the e-GP System:

1. Select "Supplier Listing" link from the "Information" section of the Homepage:

2. In the "Supplier Listing" page:

FIGURE 12-1:   Supplier Listing page

3. Select the "Search Report" Button to generate the Report On-screen or

4. Select the "Export Report" Button to generate and download a copy of the Report.
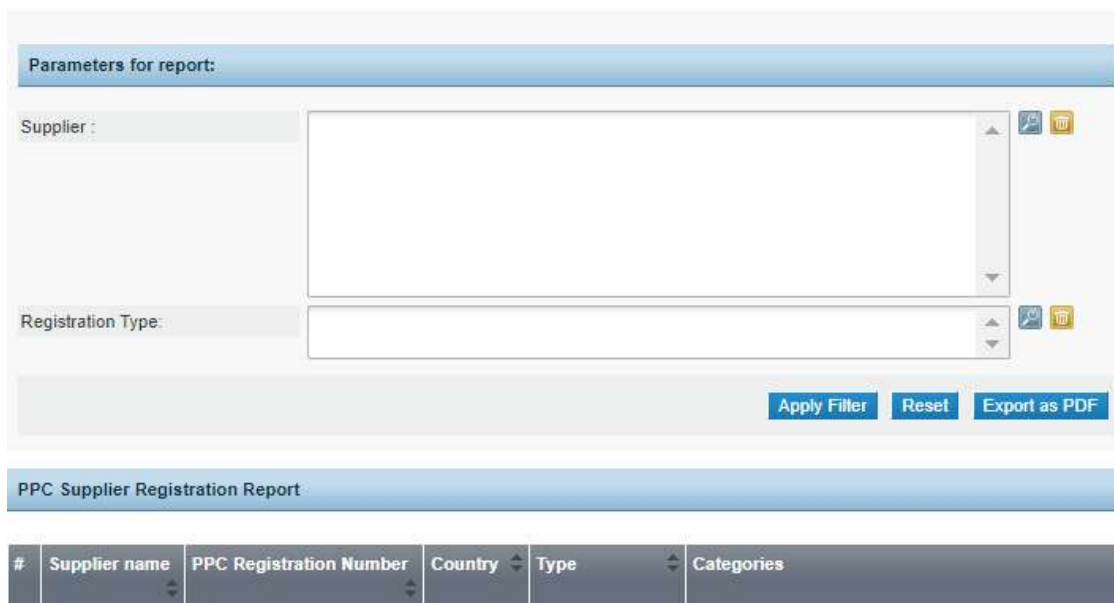
12.1.1 PPC Supplier Registration Report

To generate a Report of Suppliers registered with the Public Procurement Commission:

1. Select the "PPC Supplier Registration Report" link from the Information" section of the Homepage.

2. In the "Reporting" page:

FIGURE 12-1: Reporting page

3. Enter the Search Criteria and Select the "Apply Filter" to generate report for criteria and / or

4. Select the "Export as PDF" button to download a copy of the report.

12.2 Other Features

12.2.1 News item

For information on news published by the Office of Public Procurement Policy (OPPP):

1. Select the "News" link from the "Information" section of the Homepage.

2. In the "Information area" page:

FIGURE 12-1: Information Area page

3. Select the link for the new item of interest to generate and download a copy of the report.

12.2.1 User Manual

To access and download user manuals:

1. Select the "USER MANUAL" link from the "Information" section of the Homepage:

Information Area

Title	Description	Date uploaded	Attachment
GOJEP Java Installation Quick Guide	This GOJEP User Guide provides technical instructions related to the functionalities of the Java Software and its application to the GOJEP portal.	20/06/2022	GOJEP-Java Installation Quick Guide for Suppliers.pdf
Supplier Quick Guide- July 2021	Supplier Quick Guide	24/03/2022	MOFP e-GP System Quick Guide July 2017.rtf
Offline and Online Instruction for Bid Submission	Offline and Online Instruction for Bid Submission by Bidders.	26/09/2019	Offline and Online Instruction for Bid submission by Suppliers.pdf
Instructions for Bid Submission - Upload	Supplier Bid Upload Instructions	22/10/2017	Summary Instructions for Bid Submission Oct 2017.pdf

4 results in total.   Displaying: **1-4**   Page **1** of **1** « ‹ › »

FIGURE 12-1: Information area page

2. Select the link under the "Attachment" column for the manual of interest.

12.2.1 Procurement Legislation

To access and download a copy of the Government of Jamaica Procurement Regulation:

1. Select the "Procurement Regulation" link from the "Information" section of the Homepage.

FIGURE 12-1:   Procurement Legislation

2. Select the link under the Attachment column to generate and download a copy.

12   Appendix

12.3   Competition Workspace information

Select or enter responses to the following fields (mandatory fields are tagged with an asterisk.

Field	Definition	Special Notes
Title	Title or name of the procurement.	
Description	Brief narration describing the nature of the procurement.	
Re-Tender Flag	The option for "Original tender is selected by default. Select "Re-tender" in the event this is a repeat of a tender which was previously published then canceled.	Serves for Reporting and Analysis purposes to gauge how many tenders are Re-tendered.
Procurement Type	Select value of "Goods", "Services" or "Works" depending on the procurement procedure.	
Services sub-type	For "Services " procurement type procedures, Select "Consulting" or "Non-Consulting"	This field will only be displayed in the event "Procurement Type" is "Services"
Procurement Method	Select a value of "Open-ICB", "Open-NCB", "Restricted Bidding (RB) or "Single Source (SS)" depending on the procurement procedure.	

Field	Definition	Special Notes
Procurement Method Justification	Select appropriate justification response. The options are in conformity with the Public Procurement Act, 2014.	This field will only be displayed in the event of a "Procurement Method" procedure of "RB" or "SS".
Grade of Works	For "Works" procurement method procedures, Select the value of the Grade of works. Grade values are either of value, 1, 2,3,4 or 5.	This field t will only be displayed in the event of "Procurement Type" procedure of "Works".
PPC-NCC Registration	Select the PPC-NCC Registration code or codes relevant to this procurement.	Refer to instructions on how to Select a PPc-NCC.
Common Procurement Vocabulary	Select the Common Procurement Vocabulary (CPV) code or codes relevant to this procurement.	Refer to Instructions on how to Select a CPV.

Procurement Technique	Select the appropriate response based on the "Procurement method" selected as follows:
	
	1. For Open ICB or OPEN NCB methods:
	  ▪ Select RFP or ITB Technique
	2. For RB or SS methods
	  ▪ RFP or ITB Technique
		Refer to "GOJ Procurement Method" guidelines.
		
		In general, it is advisable to select the 'RFP", Request for Procurement option.

Field	Definition	Special Notes
Number of Stages	Select the number of Stages through which the procurement will be conducted, either One (1) or Two (2).	In the event of use of Procurement Method of RB or SS, the number of Stages can only be one (1).
Framework Agreement Establishment	In the event the Procurement is being executed to establish a Framework Agreement contract, Select the option "Yes". Otherwise the system default value of "No" shall remain.	Refer to " Framework Agreement Overview" for additional details.
Include e-Catalouge	In the event the response to "Framework Agreement (FA) Establishment" is 'Yes', Select "Yes" if the FA can be managed through the e-Catalouge module.	This field will only be displayed in the event the response to "Framework Agreement Establishment"is 'Yes"
Funding Source	Select one of the listed source of funding for the procurement.	Used mainly for Reporting Analysis purposes.
Special and Differential Treatment (SDT)	SDT regime allows for application of special pricing evaluation procedures for 'Local' Bidders so as to protect or provide incentives for some industries. System will default to "No Special and Differential Treatment" option	A "Margin of Preference Special SDT" option is available in the event of Procurement Method being "Open-ICB"
Project Reference Number	State any Project identifier or Reference Number being used for this procurement.	

Field	Definition	Special Notes
Estimated total contract value	The budget / estimate for the procurement	Estimates are printed on Tender Opening Report and allows for comparison Bidders Cost versus estimate.
Estimated total contract value public	Select the check box, only if you would like to disclose (make public) the estimated value of the procurement.	If selected, the estimate will be shown in the 'View competition details' form as well as in the published" Contract Notice"
Country of contract performance	Value of 'Jamaica' is selected by default. If the contract is to be executed outside of Jamaica, the user shall select the "Outside of Jamaica" option.	This response is necessary so as to enforce rules regarding tax compliance and Special and Differential Treatment regime etc.
Non-Petroleum indicator	Value of 'Non-Petroleum is selected by default. For Petroleum products / Oil imports etc.,	This allows for the exclusion of procurement for petroleum products from regular reporting as given their large dollar value, will distort reporting.
Deadline for Bid submission	State the Bid Submission deadline (Date and Time).	Time must be stated in Military time format; for example, 2 pm. is to be defined as 14:00 hours.

Field	Definition	Special Notes
Deadline for clarification	State the Clarification Deadline (Date and Time). Clarification deadline must be before Bid Submission deadline..	Time must be stated in Military time format; for example, 2 pm. is to be defined as 14:00 hours
Site visit - Bidders conference Date	State the Date and Time for Bidders Conference or Site Visit if there is either.	Time must be stated in Military time format; for example, 2 pm. is to be defined as 14:00 hours
Allow Suppliers to upload attachments to clarification questions	Select "Yes" or "No". System defaults to value of "Yes"	Recommendation is to Select "Yes" in all cases.
Bid opening date	State the Date and Time for Bid Opening to be done in the system. The Bid opening date and time shall be after the defined Bid Submission deadline.	System will default to a Bid Opening time of fifteen minutes after the Bid Deadline time.
Contract awarded in lots	If the procurement is to be done for lots, Select "Yes", otherwise , Select "No".	
Number of lots	State the Number of Lots, if the procurement is to be done for lots.	This filed will only be displayed in the event the response to "Contract awarded in lots" is "Yes".
Bids for lots	If the procurement is to be done for lots, state the lot bidding options available to potential bidders. Select either (a) "Only one	This filed will only be displayed in the event the response to "Contract awarded in lots" is "Yes".

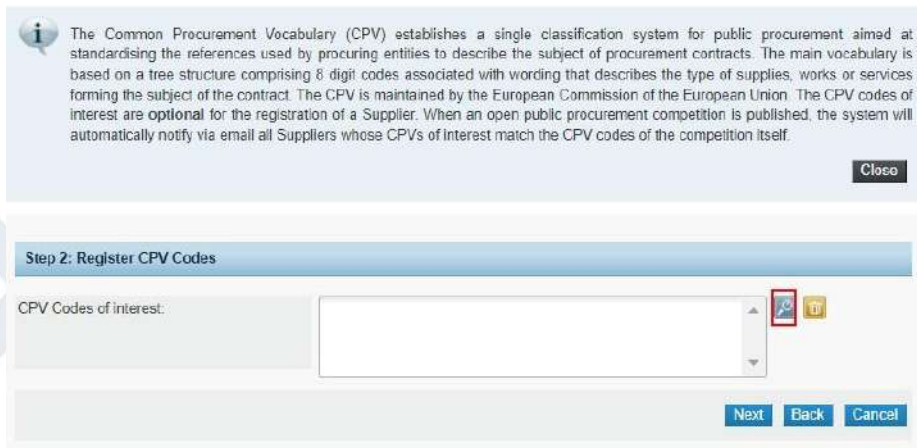| Field	Definition	Special Notes
	lot" - If Suppliers are allowed to bid on only of the listed lots, (b) "One or more lots" - If Suppliers can submit a Bid for one or more of the listed lots or (c) "All lots" - If the Suppliers are required to submit bids for all listed lots.	
Lot name (1..n)	Specify name for each of the lots indicated by the response to "Number of Lots"	This filed will only be displayed in the event the response to "Contract awarded in lots" is "Yes".
PE audit of competition workspace	Select this option in the vent your Procuring Entity requires that all system generated e-mail notifications are copied to a specially designated e-mail address.	The e-mail address to which these notification are sent is the one defined in the PE Organization details.
Planned Evaluation end date	State a projected date for completion of the Evaluation process.	Time must be stated in Military time format; for example, 2 pm. is to be defined as 14:00 hours.
Planned Contract Award date	State a projected date for award of contract for the procurement.	Time must be stated in Military time format; for example, 2 pm. is to be defined as 14:00 hours.

12.4 The Common Procurement Vocabulary (CPV) ClassificationSystem

The system makes use of the European based Common Procurement Vocabulary (CPV) procurement classification system. CPVs are used by Procuring Entities when creating new tender competitions and by Suppliers when identifying the categories of procurement they are interested in, so as for the system to automatically notify them when new opportunities are published. CPVs are also used in Searches and Reports.

Suppliers are required to indicate or register CPVs of interest during the initial creation of the Supplier organization account. Supplier users will also be able to modify (remove or add) the CPV codes initially registered for the organization using the "PE administration" functionality.

The use of CPV codes is supported through a dedicated CPV selector, as below:

FIGURE 12-1: Register CPV Codes section

NOTE: THE SYSTEM ALSO SUPPORTS THE CLASSIFICATION SYSTEM USED BY THE PUBLIC PROCUREMENT COMMISSION (PPC) IN THE REGISTRATION CLASSIFICATION FOR SUPPLIERS. HOWEVER, THIS CLASSIFICATION IS ONLY USED FOR THE DETERMINATION OF ELIGIBILITY AND CONTRACT AWARD AND NOT FOR NOTIFICATION AS IS DONE BY THE CPV CODE.