

EUS Complete Tender Management

Supplier User Guide

August 2021

Version Control

Version	Date	Amendment
0.1	7 th January 2003	Updated Version
0.2	January 2004	
0.3	February 2005	Changes following additions within transaction with multiple steps and approvals.
0.4	September 2006	
0.5	October 2008	
0.6	April 2009	Rel 6.0 (autoscoring)
0.7	November 2009	Rel 6.1 and 6.1.1
0.8	June 2010	Rel 6.4 Sid4Health
0.9	October 2010	Updated section 5.3
1.0	December 2010	Updated Rel 6.6.0
2.0	June 2011	Updated Rel 6.7
2.1	October 2011	Updated release 6.8
2.2	March 2013	Updated until release 6.9.4
2.3	October 2013	Updated release 7.0
2.4	August 2014	Updated release 7.2
2.5	December 2016	Updated release 7.5.3
2.6	August 2017	Updated release 7.6.0 (ESPD)
2.7	March 2021	Update SPS
2.8	August 2021	Update SPS

Table of Contents

SECTION 1: SUPPLIER PREMIUM SERVICE.....	1
SECTION 2: INTRODUCTION TO TENDER MANAGEMENT	1
SECTION 3: IMPORTANT ACCOUNT ADMINISTRATION	2
3.1 Add/Delete users.....	5
3.1.1 Add users.....	5
3.1.2 Delete users.....	6
3.2 Edit Users / Notification settings	7
3.3 User Groups.....	7
3.4 Update Company Profile	9
3.4.1 Company Information.....	9
3.4.2 Supplier profile.....	10
3.4.3 Current service subscriptions.....	10
SECTION 4: RESPONDING - RFT PHASE.....	12
4.1 Answer an invitation	12
4.1.1 Answer a received invitation	12
4.1.2 Answer a public invitation	14
4.1.3 Print buyer documents	14
4.2 Fill in response and submit quotation.....	15
4.2.1 Filling in the response	17
4.2.2 ESPD	22
4.2.3 Offline editor.....	27
4.3 Addenda	29
4.3.1 Buyer makes changes	29
4.3.2 Adjustment of quotation	29
4.4 Messaging.....	30
4.4.1 Send a message	30
4.4.2 Message archive.....	31
4.5 Award	32
SECTION 5: CONTRACT MANAGEMENT	32
5.1 Communicate and sign contract.....	33
5.1.1 Receive a draft contract.....	33
5.1.2 Receive a final contract.....	36
5.2 Contract amendments.....	36
5.3 Messaging.....	36
SECTION 6: GENERAL USER INFORMATION.....	37
6.1 Sid4Health.....	37
6.2 Questions and Answer (Q&A) module	38
6.2.1 User view	38
6.3 Edit user profile	39
6.4 Document folders	43

6.4.1	Upload documents from PC.....	43
6.4.2	Upload several documents at the same time from your PC	44
6.4.3	Upload document to a specific question in the Questionnaire...	46
6.4.4	Version management.....	46
6.5	Reporting.....	47
6.6	Digital signing	47
SECTION 7: E-AUCTION		49
7.1	Confirm your first bid into auction.....	49
7.2	Start of auction/enter bids and automatic warnings	50

Section 1: Supplier Premium Service

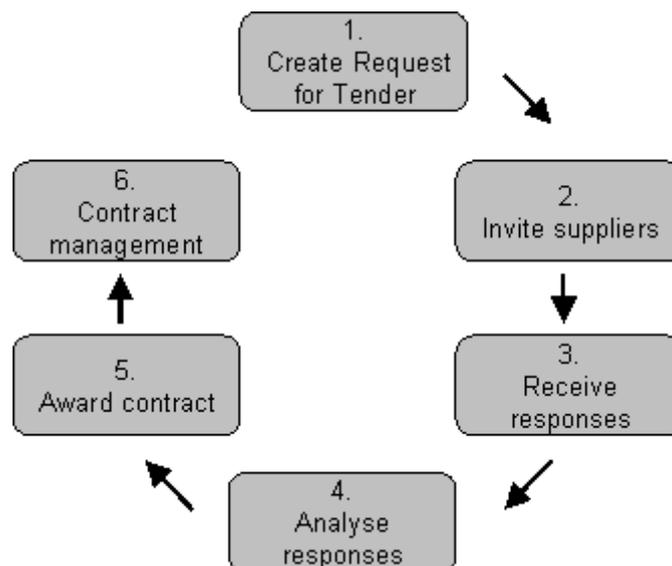
Supplier Premium Service (SPS) is an optional toolkit on CTM which provides additional functionality. These include:

- upload up to 100 files with a few clicks,
- helps you sync tender dates into your calendar,
- collaborate with your team and much more.

SPS will make your life easier to respond to more tenders and win more business. This supplier guide covers some of the optional functionality only available when having subscribed to SPS. Further information on SPS is available at the [website](#).

Section 2: Introduction to Tender Management

EUS Tender Management is a comprehensive tool that allows tenders to be created, distributed and evaluated without the need to create and manage paper documents. The Tender Management tool makes the tendering process easier for both buyers and suppliers and covers the entire process including the contract management phase.



Tender Management is used by government organisations and general contractors to improve the efficiency of the tendering process. For those who respond to tenders, for example general contractors, sub-contractors and trades people, tender management simplifies and speeds up the process of formulating tender responses.

You can add all of the necessary drawings, specifications, schedules, tender documents and other attachments to the Request for Tender you issue or receive.

Buyers have access to a rich database of their chosen suppliers when issuing a Request for Tender. If appropriate, you can source potential new suppliers, complete with pre-qualification details, from the supplier database.

Suppliers are able to present information to initiating organisations at the time and place that purchasing decisions are made.

Tender Management offers you the following advantages:

- Saves you time and money compared with traditional methods
- Greatly improves the exchange and management of information
- Improves accuracy throughout the tendering, quotation and contract process
- Reduces time wasted on low value administration (faxes, phone, travelling)
- Increases traceability

Web-based for easy access to information - anytime, anywhere

Introduction to RFT

CTM is flexible and can be used by the buyer to initiate pre-qualifications, RF(x) processes, Invitations to Tender or management of contracts. A "RFT" can include multiple phases/steps of different types. Below the different types are listed:

Types of phases:

- RFT phase – Tendering phase where the buyer sends out information to potential suppliers, configure a response form to be filled out by the suppliers and evaluate responses received.
- Auction phase – A possibility to make the received quotes transparent among the suppliers, still with confidentiality.
- Contract phase – Enables management of the contracts online. The buyer can create a contract file, collaborate with the supplier and receive the formal acceptance.

In the sections below the supplier side of each type of phase is outlined. For each phase of the RFT you receive a separate invitation.

An RFT may include any number of phases using the different types. Therefore, an RFT for example could include the following: pre-qualification, tendering and finally contract management

Section 3: Important Account Administration

EUS Tender Management is only available if your company has registered to use this system.

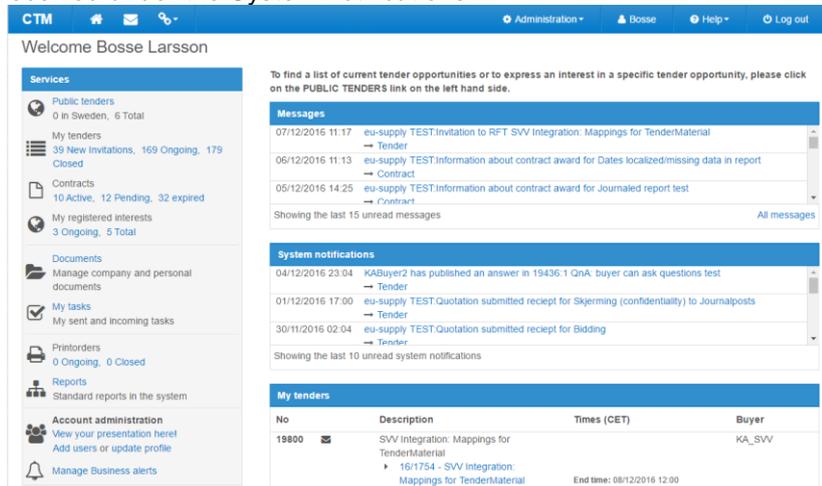


To access EUS Tender Management:

Open your web browser and go to your CTM logon page.

Insert your Username and Password into the appropriate fields then click on the **Log In** button.

The EUS Tender Management Welcome Page displays Services to the left, any Messages and System notifications received in the middle and a list of Invitations received under the System notifications.



On the first page in the system (once logged in), on the left-hand side menu, there are listed different Services. Account Administration is also located here, under which you can set up the CPV codes in order to receive business alerts and set up the presentation of your company for the authorities.

Public tenders: A list of all published tenders

Services

-  **Public tenders**
0 in Sweden, 6 Total
-  **My tenders**
39 New Invitations, 169 Ongoing, 179 Closed
-  **Contracts**
10 Active, 12 Pending, 32 expired
-  **My registered interests**
3 Ongoing, 5 Total

-  **Documents**
Manage company and personal documents
-  **My tasks**
My sent and incoming tasks

-  **Printorders**
0 Ongoing, 0 Closed
-  **Reports**
Standard reports in the system

-  **Account administration**
[View your presentation here!](#)
[Add users](#) or [update profile](#)
-  **Manage Business alerts**

-  **Question about a tender?**
Please contact the authority via the Messaging tab or according to instruction in the specific tender.

Do you need technical support?
[Create a ticket](#)
 or email: Karen.Aab@eu-supply.com
 phone: +46 8 545 532 88

-  **User guides (pdf)**
[Supplier tender management](#)

My tenders with three tabs with amount of different tenders showing: New Invitations, Ongoing tenders and Closed (can only be closed by the authority)

Contracts: If you have been awarded a contract and the authority uploads the contract into the system it is then found in this section: Active=approved through system, Pending= sent but still to be approved, Expired= end date of contracts has expired

Account Administration. The most important set up of your company profile in order to create users, add correct details and manage

Depending on country of the authority and the company, relevant phone number and e-mail address to local support desk can be found here.

3.1 Add/Delete users

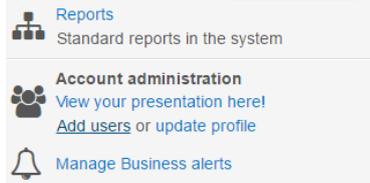
3.1.1 Add users

***Subject to SPS license**

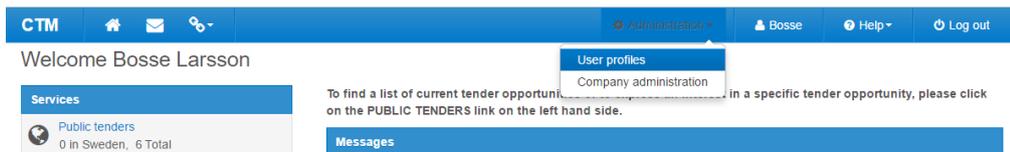
You can access the Add users functionality within your company administration pages, which can be navigated to in the following ways:

Either

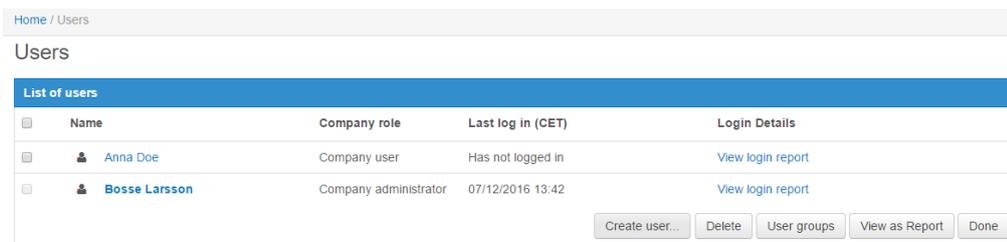
1) click on the link [Add users](#); or



2) go directly to the administration interface by clicking at Administration at the top of the main page where you have access to User Profiles.



Irrespective of which way you choose to access the site, the result will be the page where users and user groups can be added and edited. There is no extra charge for the supplier/contractor to add multiple users to their company.



Click on **[Create user]**.

Fill in the relevant and necessary information and determine which Security role the user should have (Company user or Company administrator). Click Save.

Personal profile

Contact details

* First name Middle initial * Last name

Title

* Email

* Office phone (country, area, number)
(Example +44 2 9342 0000)
46

Mobile number (country code) (area code) (number)
(Example +44 421 756 000)

Fax number (country code) (area code) (number)
(Example +44 2 9342 0000)

Account details

* Username (at least 6 characters)

* Password
(Letter (A-Z) required, Number required, Minimum length: 6)

* Confirm password

- Please make sure you enter a valid e-mail address.
- The address will be used to send an e-mail containing temporary login information.
- The new user will not be able to submit responses until a valid certificate has been registered in the users profile. Alternatively a letter of authentication can be sent by mail or fax to complete the proposal.

* Security roles [Information about roles](#)

Company administrator

Company user

Regional settings

* Preferred language * Time zone

User settings

User: User may sign on behalf of the company

3.1.2 Delete users

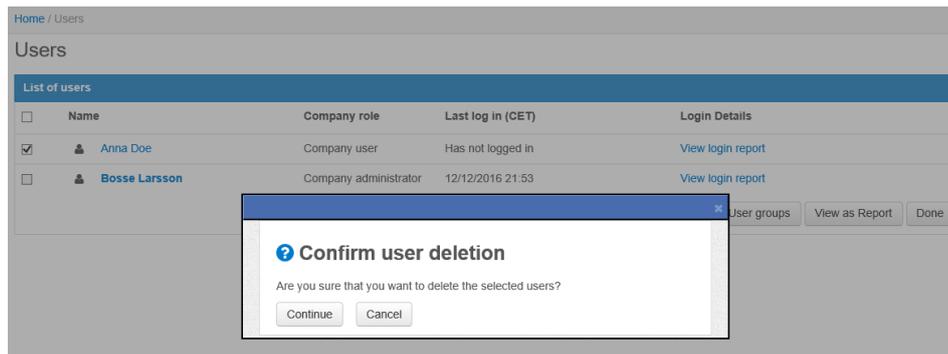
To delete a user all you need to do is tick the checkbox in front of the persons name on the Users page and then click [Delete].

[Home](#) / [Users](#)

Users

List of users				
<input type="checkbox"/>	Name	Company role	Last log in (CET)	Login Details
<input checked="" type="checkbox"/>	Anna Doe	Company user	Has not logged in	View login report
<input type="checkbox"/>	Bosse Larsson	Company administrator	12/12/2016 21:53	View login report

The following warning message will be displayed, asking you to confirm that you wish to perform this action:

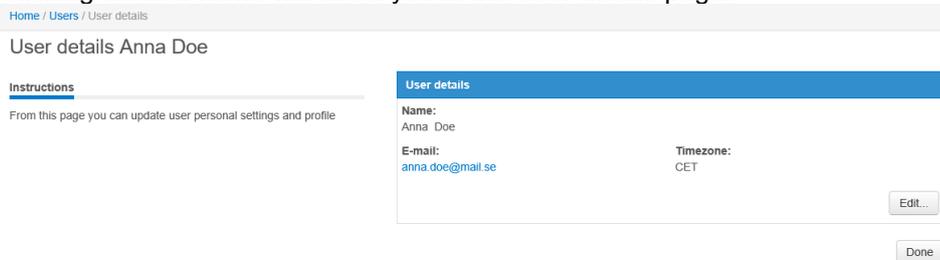


Click [Continue] to confirm the action and [Cancel] to abort.

3.2 Edit Users / Notification settings

***Subject to SPS license**

You can Edit the user information by clicking on the persons name on the Users page. Clicking on their name will direct you to the User details page.



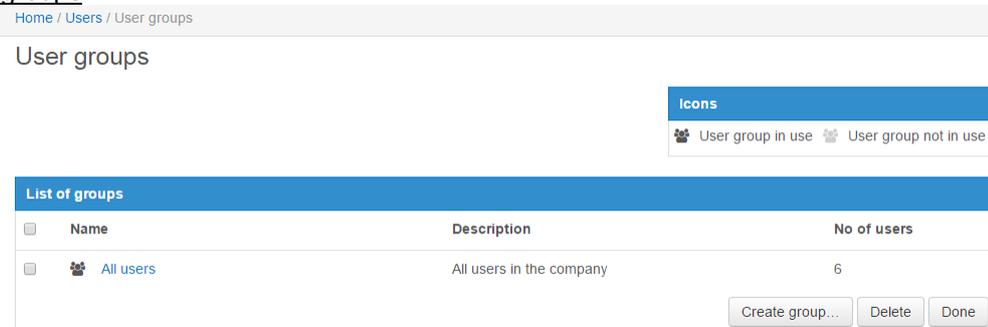
Click on [Edit...]

You are directed to the Personal profile page of that user where it is possible to edit all of their information and to set up the 'Notification settings via email' for that user.

Please don't forget to Save all the changes when you have finished editing the user profile/ changing notification settings.

3.3 User Groups

To create a User group navigate to the general Users page and click on the link User groups.



To create a new group click on [Create group...]

You are directed to the Create User group page.

Home / Users / User groups / Create group

Create group

Instructions

Enter the name and the description of the new group using the input fields.

Member types:

- Administrator
- User
- Agent

Group information

Group Name *

Description

Save Cancel

Fill in the fields for Group name (required) and Description, then click **[Save]**. You are directed to the Add/Remove members page.

Home / Users / User groups / Edit group / Add/Remove members

Add/Remove members

New group

Instructions

The left list displays available users and groups within your company. The right list displays the current members. To update members, select users or groups and click the appropriate arrow button. Search users and groups by typing part of name in the search box.

Invited agents are marked with a # sign.

Groups are displayed as [Group].

Member information

All users Search users and groups Members

Anna Doe
Bosse Larsson

Save Cancel

Here you can choose which members you would like to add to your user group. Choose the member by clicking on their name and then on arrow to add them to your new group.

Click **[Save]** and you are directed to the Edit group page where it is possible to set permission levels for the groups users.

Home / Users / User groups / Edit group

Edit group

Instructions

You can change the name or the description of the group using the input fields.

The 'Inactive' feature enables or disables the group. Therefore, if it is checked, the group will not be visible when assigning user access rights, but any historic accesses made the permissions will still remain to the group.

To update permissions for a user within the group, select or unselect the appropriate checkboxes. If the group has been assigned to a project and you change the permissions of a user within the group, the change will be reflected in the project. If an "over-ride" of the permissions assigned within a group is desired, a user can get extended/reduced permissions for a specific project. Such changes are done within the project.

To save changes made, click on 'Save'.

- Editor: Has create, view and update permissions.
- Limited editor: Editor but cannot create [rtgs]
- Viewer: Can only view information.
- Limited viewer: Viewer but no access to quotation information.

Member types:

- Administrator
- User
- Agent

Group information

Group Name *

Description

Inactive

Users and permissions

User	Editor	Limited editor	Viewer	Limited viewer	Evaluator
Anna Doe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bosse Larsson	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

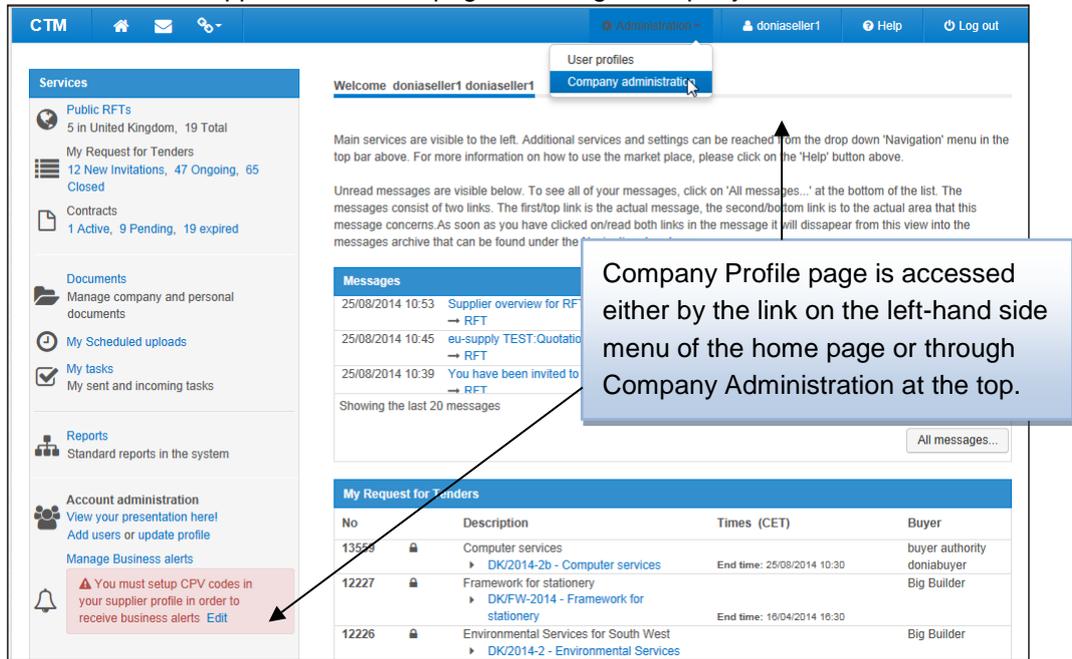
Add/Remove members... Save Cancel

Tick the checkboxes for the permissions you wish to grant the users and click **[Save]**. You are directed back to the User groups page - your new group has now been created.

To delete a user group all you need to do is tick the checkbox next to the user groups name and then click on **[Delete]**. Confirm your action in the pop-up warning message and the user group is deleted.

3.4 Update Company Profile

Your company profile is visible to all authorities that search for companies in the system. The Company profile page is accessible from either the link on the left-hand side menu of the applications home page or through Company Administration.



3.4.1 Company Information

Here you can edit the organization type, address, main contact person, VAT number and other basic details. Many of these are MANDATORY and important for the authorities.

Company information	
Company trading name tavastseller1	Region/Division
Main office address address 11245 Sthlm Sweden	Organisation no 90898789
Company description tavastseller1	
Contact person name Admin Tavastseller1	Email ✉ anette.tavaststjerna@eu-supply.com
Phone +46 8 987987	
Current membership Promotional membership	Type of Organisation Private Company
<input type="button" value="Edit..."/>	

3.4.2 Supplier profile

***Subject to SPS license**

Under Supplier profile it is possible to add more detailed company information.

Supplier profile	
 Company Profile (presentation of business) Enter detailed information about your company, such as detailed description, number of employees, turnover, etc. This information will be available on your supplier profile	Edit
 Logotype display Upload a logotype to be displayed with your profile.	Edit
 Products/services offered Update categories in your company profile. It will allow the contracting authorities to find your company in searches	Edit
 Market coverage My company's market coverage areas	Edit

[Preview](#)

Company profile. Here you are able to fill in a more comprehensive presentation of business, such as amount of employees, approximate turnover, etc.

Logotype display. Upload a small logotype that will be visible for the authorities when they are searching for suppliers.

Products/services offered. Categorize your company's products/services for better visibility.

Market coverage. Add all countries and areas where your company is active.

3.4.3 Current service subscriptions

***Subject to SPS license**

This service may vary depending on installation/country.

Current service subscriptions	
 Manage Business alerts	Edit
 Document folder	Display
 Printshops Manage printshops available to your company.	Edit

[Done](#)

The most effective way to be alerted about new business opportunities made available by any authorities in Europe, is to activate the business alerts via Manage Business alerts.

These can be sent to multiple users within your company as long as you have added them within the Users page.

Fill in the information as appropriate and click **[Done]**.

Configure Business alerts

STATUS OF BUSINESS ALERTS

On Off ✔ Business alerts are on

You have selected to use the eu-supply business alert feature, in accordance with the terms you agreed to at signup.

Start date: 05/04/2013
Expiration date: 05/04/2014

⚠ Your subscription has ended!

EMAIL ADDRESSES

Add email

CPV CODES

41100000-0 Natural water ✕

GEOGRAPHICAL LIMITATION

Norway ✕

Business alerts are now set up for your company and will be sent to all the users you have specified.

Section 4: Responding - RFT phase

You will receive an invitation either as a system message or email depending on how your user profile has been set up, or you can answer a public invitation published by the buyer.

4.1 Answer an invitation

Invitations can be sent to you directly as an invitation email or the buyer can publish the invitation for any supplier to answer and fill in a response.

4.1.1 Answer a received invitation



To view invitations received:

1. To view the invitations your company has received, click on the [New Invitations](#) link under Supplier services.

Services

- My Request for Tenders
19 New Invitations,
176 Ongoing, 296 Closed
- Public RFTs
0 in Germany, 98 Total
- Contracts
8 Active, 13 Pending, 35 expired
- Documents
Manage company and personal documents
- My Scheduled uploads
- My tasks
My sent and incoming tasks
- Printorders
0 Ongoing, 0 Closed
- Reports
Standard reports in the system
- Account administration
View your presentation here!
Add users or update profile
- Question about a tender?
Please contact the Contracting Authority via the Messaging tab or according to instruction in the specific tender.
- Do you need technical support?
(PLEASE NOTE: The helpdesk can't answer questions about tenders). Please contact the helpdesk on:
support@eu-supply.com
phone: +46 8 617 35 50
- User guides (pdf)
Supplier tender management

- The list of invitations is displayed. The icons show the status of the invitation.

Home / My tenders

My tenders

Invitation Locked from tender
 Declined invitation Tender is cancelled
 Published New response requested

Ongoing Completed/Closed

No	Description	Times (CET)	Response owner	Buyer
19792	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Testing unit-based setting (messaging only) ▶ Testing unit-based setting (messaging only)	End time: 05/12/2016 12:00		KA_ptest
19754	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> 16/1754 - Direct procurement (invites only) ▶ 16/1754 - Direct procurement (invites only)	End time: 26/11/2016 12:00		KA_SVV
19738	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> 34887 - Journaling task set per unit ▶ 34887 - Journaling task set per unit	End time: 24/11/2016 12:00		KA_ptest



To respond to a received invitation:

- Click on the [New Invitations](#) link under Supplier services. The list of invitations displays.
- Click on the description link for the RFT to answer.

If you have received an email with a link to the invitation you can click on the link, log in and you will end up in the invitation directly.

- The page displayed shows general information about the RFT and details about the packages included in the RFT. This may be followed after a general invitation/introduction page if the buyer has used this function.

CTM

You are hereby invited by KA_SVV to participate in this tender. Please click the 'Accept' button if you are interested in the tender outlined below. If you do not wish to participate, please click 'Decline'. If you wish to defer your decision, please click 'Answer later'. KA_SVV will be informed automatically of your decision.

Please Note: Before you accept, make sure your user account is connected to the correct organisation number. You can find your organisation number if you click on 'View your presentation here!' from your Home page under 'Account administration'.

Tender information

Tender: 16/1754 - Invitations only (direct tender), no publication	Company: KA_SVV Glyvegatan Oslo Norway View profile	Contact person: ka_svv1_ka_svv1 karen.aab@geo-supply.com
---	---	---

Response deadline (CET):
23/12/2016 12:00

Package 19736:1

LOT 1: Qualification

Package 19736:2

LOT 2: Bidding

If the buyer has selected to include Tender Conditions they may have to be accepted prior to accepting the RFT invitation.

The above page can look different depending on settings that the authority has selected.

If documents have been attached, click on [\[View documents\]](#) to see the package documents.

- To download a single document, click on the document name.
- To download all documents, click on the [\[Download all \(zip\)\]](#) button. Then all of the attached documents are downloaded as a zipped file.

- Drawings can be viewed directly on the Tender system without being downloaded first. These have a [View](#) link under the name. To view a drawing, click the [View](#) link.

If a Bill of Quantities has been attached, click on the [\[View BoQ\]](#) button to see the Bill of Quantities information included.

4. Answer the invitation

- If you are interested in responding to this RFT, click [\[Accept\]](#). The buyer is informed of your decision and you are able to submit a quotation.
- If you are NOT interested in responding to this RFT, click [\[Decline\]](#). The buyer is then informed that you will NOT submit a quotation.
- If you want to answer at a later time, click [\[Answer later\]](#).

4.1.2 Answer a public invitation

If the buyer has published the RFT it is possible for any supplier registered within the system to accept and fill in a response and submit a quotation about the RFT.



To respond to a public invitation:

1. If you are logged in, click on the [Public tenders](#) link under Supplier services. The list of public invitations displays.
2. Click on the Name link for the RFT to answer.
3. If documents have been attached, click on [\[View Documents\]](#) to see the documents list (same for [\[View BoQ\]](#)). You may not be able to download all documents: if the buyer has not explicitly allowed you to download the documents then you only have access to the documents list.
4. Accept the invitation by clicking [\[Accept\]](#). Reject the invitation by clicking [\[Decline\]](#). If you wish to respond at a later date click [\[Answer later\]](#).

If you are not logged in, you can access the list of public tenders from your login page. Your company needs to be registered in the system to be able to answer and submit quotations.

4.1.3 Print buyer documents

The buyer can allow you to send his documents for a fee to a print shop set up by him. A print shop is a local firm to where you can send your files to be printed onto paper if you do not have the necessary tools to print the documents attached by the buyer.



To send documents to a print shop:

1. Go to the tenders main Response page.
2. Click on the [Print documents...](#) link.

My Response Contracts Messaging Audit trail

Tender

View tender
 Access documents
 Supplier questions and answers
 Print documents...
 Assign user access

- List of documents available for printing is shown. Select the documents to send and click [Order documents...].

Documents			
Name	Size	Created	
<input type="checkbox"/> QnA: buyer can ask questions test /			
<input type="checkbox"/> Drawing 11.B (file2 - Copy (16).pdf)	2412	16/12/2016 01:03	
<input type="checkbox"/> Drawing 11.A (file2 - Copy.pdf)	2412	16/12/2016 01:02	

- The order form is displayed. Fill in the required information and click [Save] to send the order to the print shop.



To see status of sent print orders:

- From the home page, click the Print orders link in the services area.
- You can use the links of the print orders to see details and printing status.

Paid by company
 Company print orders

Ongoing		Completed/Closed	
Reference	Printshop	Created	Status
RFQ_20407_35	KA Printshop 1	16/12/2016 01:06	Created

4.2 Fill in response and submit quotation

After acceptance of the invitation you can start filling in the response. The response has to be submitted prior to the End Time Quotation. The buyer can however continuously throughout the process lock out any suppliers involved. You are then notified through a message and cannot make any changes to your quotation. The RFT is then marked with a icon. The buyer may also choose to allow changes to the quotations after End Time Quotation.

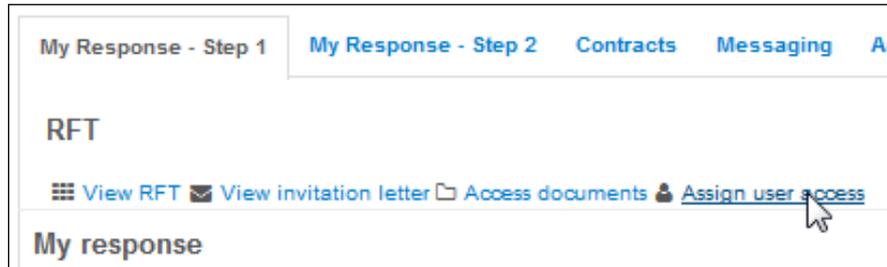
To share the invitation and to allow other users within your company to update or view the response, you can assign user access rights to the invitation.



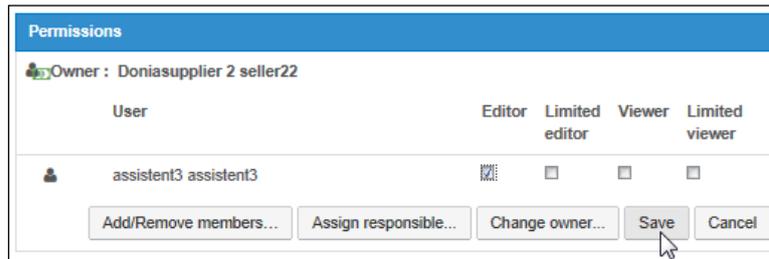
To assign user access rights:

**Subject to SPS license*

1. Click on the [Assign user access](#) link on the main tender Response page.



The assign team page is displayed.



2. Click the [Add / Remove members...](#) button, a list of available users and teams will show. Select the teams and users you want to give access to your invitation, use the arrows to move them to the right hand pane. Use the Ctrl-key to select more than one user. Click [\[Save\]](#) when done.
3. If you have accepted the tender you are then automatically the owner of the tender. To change ownership to a colleague the person must be registered as a user within the system, you should then Add him as member and finally click on [\[Change owner...\]](#) button to change from you to him/her.
4. Select the roles a team or user will have in your invitation by ticking the boxes for each user and team. The following roles are available:
 - **Editor** - Can both access and change information within the invitation
 - **Viewer** – The viewer can only view the information within the invitation, both the information requested by the buyer and the response filled in.
5. Click [\[Save\]](#) when the selecting of roles is complete.

You can also assign a responsible contact person to your quotation. When the buyer has any type of communication with your company regarding this RFT, the responsible person will be high-lighted. A responsible is assigned by clicking the [\[Assign responsible...\]](#) and select one (or more) of the users in the list.

To cancel expression of interest or withdraw quotation:

If you decide that you do not wish to participate in the tender you can cancel the expression of interest or withdraw your proposal. The two actions result in the same result but can be done at different times in your response. The cancelling of interest is made prior to having sent in the quotation to the buyer and the withdraw of quotation is made after you have sent in a response. The buyer will be notified about your decision.

If you regret cancelling or with-drawing the quotation you can at any time, prior end-time, resume your quotation and continue to fill in your response.

4.2.1 Filling in the response

A response can contain the following parts to be filled in:

- *Document compliancy* – The buyer is requesting to review the contents of one or more documents and wants you to set if you agree with the document or not.
- *Qualification questions* – The buyer is requesting you to answer questions as part of your response.
- *BoQ (Bill of Quantities)* – The buyer is requesting detailed pricing on a BoQ file.
- *Total quote* – A total quote is requested to be filled in.
- *Documents* – Any documents can be attached to your response.

If you do not see all the areas, it is due to the fact that the buyer can leave out areas which he does not want to receive as a response. Click on the [\[Detailed instructions\]](#) link to the left to see details of how to fill in the response requested. As you start to fill in your response the percentage bar on the right hand side will increase.

To set compliance:



1. Click on the [\[Confirm compliance...\]](#) button, the confirm compliance screen is shown with the documents.
2. If you want to include a comment on a document, click on the [Comments](#) link under the documents. Any comments are displayed for the buyer when reviewing your quotation.
3. After having reviewed the documents, select the compliance and click the [\[Save\]](#) button.



To answer questions:

1. Click on the [\[Answer questions...\]](#) button, questions to be answered are displayed.

2. Fill in the answers to questions and click **[Save]** or **[Save and Next]** to go to the next question section to answer.

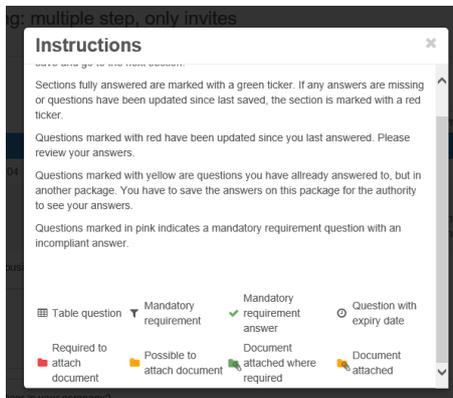
If you have already answered any of the questions in a previous tender, the answers are pre-filled and you need only to save them again. Any answered from a previous tender is marked yellow. If the question has been updated since you last answered the question it will be marked with a red marker. This functionality will however only apply if relevant setting has been made by the procurement officer.

As the questionnaire is usually of the uttermost importance we recommend that you read the Instructions accessible via the **[Instructions]** button.

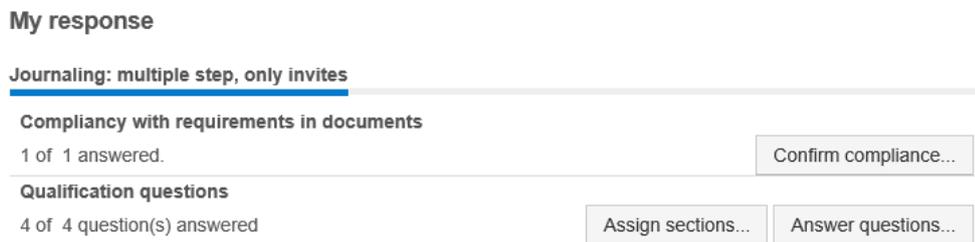
Tender 19284 - Journaling: multiple step, only invites

Instructions

Package 19284:1 Response form



Within the Qualification questions you can assign sections to be answered by different users within your company. To do that please click on the **[Assign sections...]** button accessible from the main response page, next to the **[Answer questions...]** button. I.e. you assign sections to the person within your company that is most suitable to answer the questions within the section.



If the buyer has decided to use autoscoring this will affect you in such way that you will see the scoring decided for each question answer. However, autoscoring can only be applied to single choice and multiple choice questions.

On the main My response page to the right you have a Totals box where you can see how many questions you have answered and if anything is missing. Example below shows 100% completion as all questions have been answered and given a response

sum, it also shows that you have submitted your response as the Response bar is green. Prior to sending out the response the bar will be red.

CTM Administration Doniasuppl... Help Log out

Home / My RFTs / RFT 20674

RFT20674 - DK/2013 - Office material Project: Release 6.3.5/ 6.3.6/ 7.0

Instructions

To submit response:
Please allow some time for sending of your response.
After clicking 'Submit response' you will be required to verify yourself by entering your user name and password.

Detailed instructions

Response submitted: 31/10/2013 13:12

Time left: 263:16:31

My Response Contracts Messaging Audit trail

RFT Dates (CET)
Response deadline 11/11/2013 12:30

View RFT Access documents Supplier questions and answers Assign user access

My response Progress

Office material

Qualification questions
3 of 3 question(s) answered Assign sections... Answer questions...

Total quote (GBP)
Compliant quote:32,132,333.00 Enter response sum...

My documents
0 document(s) attached Attach documents...

Response submitted: 31/10/2013 13:12

View/Print response form Withdraw response Submit response

When you go to answer the Qualification questions you are directed to a page where you can fill in your answers and also attach your documents to the folders shown on the right-hand side of the questions.

[Instructions](#)

Package 19284:1 Response form

[Print...](#) [Save](#) [Save and back](#) [Exit](#)

Response form

Time left before session times out 1199:27

	Score	Weight
	General	<div style="display: flex; justify-content: space-between;"> 3 questions to answer 4 questions not answered </div> <div style="text-align: right;">Section weight 12.50 %</div>
G1	Give an overview of your business <div style="border: 1px solid #ccc; padding: 5px; min-height: 30px;"> Overview f business </div>	781
G2	Do you have a security officer in your company? <input checked="" type="radio"/> Yes <input type="radio"/> No	
G3	Which of the following security certificates do you hold? Please check all that apply. Add attachments as proof <input type="checkbox"/> ISO2001 <input type="checkbox"/> ISO2005 <input checked="" type="checkbox"/> ISO2014 <input checked="" type="checkbox"/> ISO2016	
	Financial	<div style="display: flex; justify-content: space-between;"> 1 questions to answer 0 questions not answered </div> <div style="text-align: right;">Section weight 12.50 %</div>
F1	Specify the companys revenue for last fiscal year <div style="display: flex; align-items: center;"> <input style="width: 100px;" type="text" value="5000000"/> <div style="margin-left: 10px;">Mandatory requirement limits: 100,000 - 10,000,000 (ex: 123)</div> </div>	

Time left before session times out 1199:27

[Print...](#) [Save](#) [Save and back](#) [Exit](#)

Please note that some Questions can require mandatory attachment of document as part of the answer, others (as in previous picture) you have the option to add an attachment with that question/requirement.

If you do not attach document where required the progress bar and text beneath will tell you this to warn you as you will then not be compliant with tender requirements.



To fill in a BoQ quote:

BoQ quotes can be filled in in two ways, either by filling in the quotes online or exporting all the items to be priced in an Excel file, filling in the quotes within the Excel file and then uploading the filled in Excel file.

To price the BoQ online:

1. Click the [\[Price online...\]](#) button on the main response page and you are directed to the Package BoQ page.

Package BoQ

✖ This BoQ is not fully priced
Display only incomplete rows

Elementer markert med rødt er oppdatert av Authorityen. Disse prisene må oppdateres nå, og lagres for å levere et tilbud som er i overensstemmelse med spesifikasjonene. Choose S to enter quote on the selected row, I to include the quote in another row, E to exclude the item from the proposal.

Code#	Description/Comment	Quantity	Unit	S/I/E	Quote	Total	Product information	Version	
S: Set quote on this row I: Included in total price or on other row E: Excluded from the proposal									
h1	Header #1 A header comment Header total: -								
n1	Note #1								
I1	Item #1	123.00	um	⊙○○	<input type="text"/>	-	<input type="text"/>	<input type="button" value="⊞"/>	
I2	Item #2	250.00	mm	⊙○○	<input type="text"/>	-	<input type="text"/>	<input type="button" value="⊞"/>	
I3	Item #3	100.00	cm	⊙○○	<input type="text"/>	-	<input type="text"/>	<input type="button" value="⊞"/>	
I4	Item #4	40.00	dm	⊙○○	<input type="text"/>	-	<input type="text"/>	<input type="button" value="⊞"/>	
I5	Item #5	12.00	m	⊙○○	<input type="text"/>	-	<input type="text"/>	<input type="button" value="⊞"/>	
I6	Item #6	1.00	km	⊙○○	<input type="text"/>	-	<input type="text"/>	<input type="button" value="⊞"/>	
I7	Item #7	1.00	m2	⊙○○	<input type="text"/>	-	<input type="text"/>	<input type="button" value="⊞"/>	
I8	Item #8	12.00	m3	⊙○○	<input type="text"/>	-	<input type="text"/>	<input type="button" value="⊞"/>	
I9	Item #9	11.00	mm2	⊙○○	<input type="text"/>	-	<input type="text"/>	<input type="button" value="⊞"/>	
n2	Note #2								
I10	Item #10	10.00	mm3	⊙○○	<input type="text"/>	-	<input type="text"/>	<input type="button" value="⊞"/>	
							Total Price: 0.00		
							Total Price including supplier created rows: -		
							<input type="button" value="Add row..."/>	<input type="button" value="Save"/>	<input type="button" value="Back"/>

2. Enter your rates per item. You can also enter a comment and product information if desired. The product information content is added by the buyer, it may contain mandatory fields.
3. If you want to price on the total of the row instead of per item quantity, fill in the total column and the item price will be calculated (rounded if necessary).
4. Click on the **[Save]** button to save your quotes.

To price the BoQ in Excel:

1. Click the **[Price offline...]** button on the main Response page. An Excel file will be downloaded. Save the downloaded file to your PC. Click **[Done]** to go back to your main Response page.
2. Open the exported file and fill in prices in the rate column of the Excel. You can also enter any comment or product information in the Excel file.
3. Save and close the file when done with the pricing.
4. To import the priced Excel, click the **[Import pricing...]** from the main Response page
5. Click on **[Browse...]** and select the priced Excel file from your PC. Click **[Import]**. The validation of the import is shown. If any errors are displayed, update the file accordingly and re-import. Click **[Proceed]** when there are no validation errors.

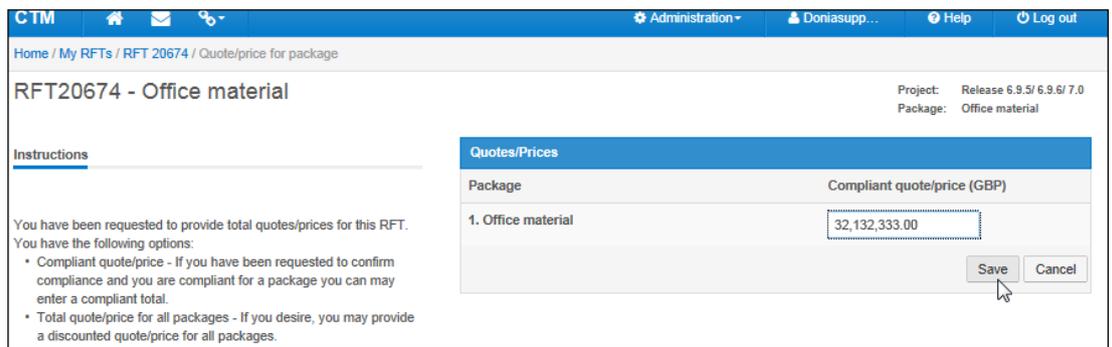
When pricing the BoQ you can choose to set quotes of included or excluded. Included means that you may enter a lump sum on one of the items and then check other items as included. Excluded means that you do not deliver this item.

The buyer may allow you to create own items or recommend substitutes for items as part of your response. If so, click on the  icon by an item to create a substitute. To add new items, click on the [Add row...] button at the end of the item list, or use the Supplier rows sheet within the exported Excel price sheet.



To enter a total quote:

1. If a total quote has been requested click on the [Enter response sum...] button.



The screenshot shows the CTM web interface for RFT 20674 - Office material. The page has a navigation bar with 'Administration', 'Doniasupp...', 'Help', and 'Log out'. The main content area is titled 'RFT20674 - Office material' and includes a 'Quotes/Prices' table. The table has two columns: 'Package' and 'Compliant quote/price (GBP)'. The first row shows '1. Office material' with a value of '32,132,333.00'. There are 'Save' and 'Cancel' buttons at the bottom right of the table.

Package	Compliant quote/price (GBP)
1. Office material	32,132,333.00

2. Enter a quote and click on the [Save] button. The buyer can allow you to enter an alternative quote, i.e. a quote which does not fill all the requirements of the RFT. If you enter an alternative quote, please attach documents that describe the alternative quote. A qualified quote can only be entered if you have fulfilled the demands described in the document compliancy section.
3. The buyer can have requested that you fill in any optional add on quotes to your response. Fill in any add on quotes in the fields and save. Attach documents that describe the add-on quotes i.e. the qualified bid plus any quotes entered.

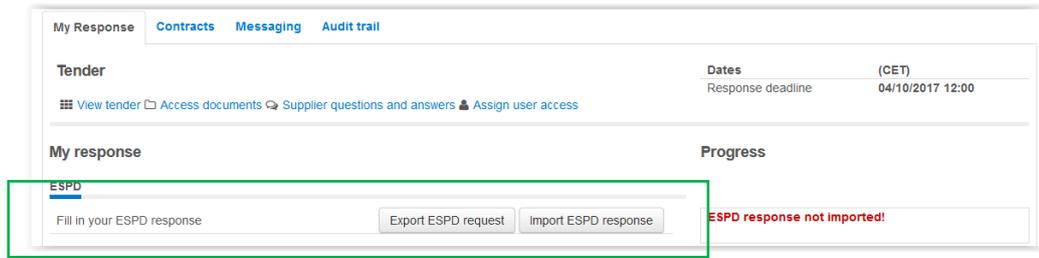
4.2.2 ESPD



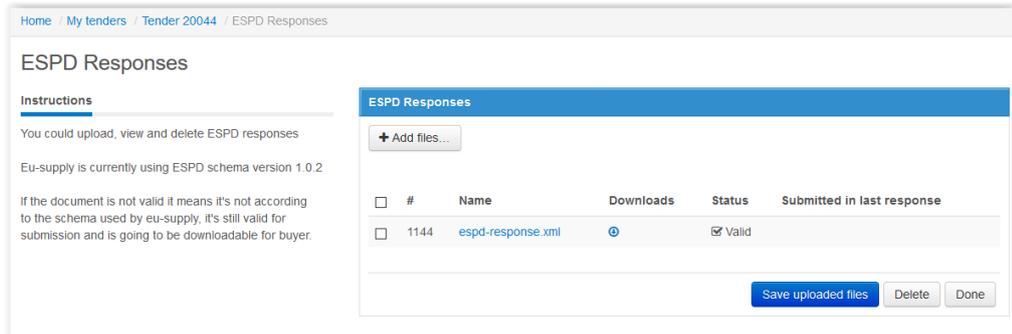
The ESPD response is part of the tender response and can be exported to the standard format of data model v1.0.2.

The workflow for suppliers are

- Export the ESPD request (i.e. save the request as an xml-file)
- Creating the response by using any third-party provider, either the EU commission service (<https://ec.europa.eu/tools/espd>) or any other procurement application supporting the v1.0.2 data model.
- Save/download the response at the local computer
- Import the response into CTM



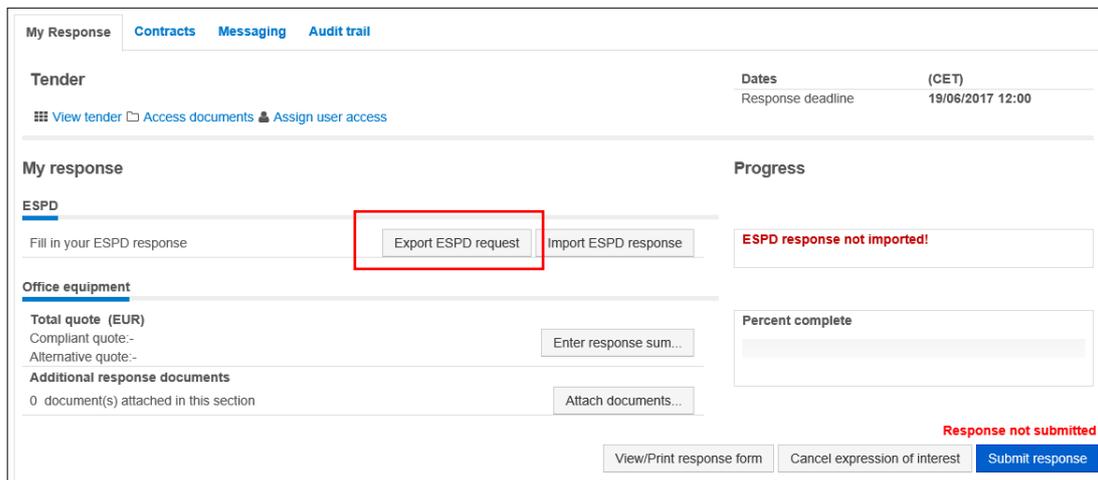
The supplier can upload more than one ESPD response per tender, for example one for each subcontractor that is part of the tender.



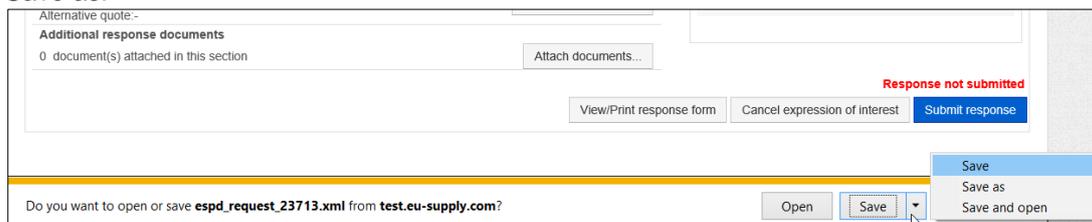
CTM validates the uploaded ESPD response for the v1.0.2 data model of ESPD. Changes to the ESPD responses requires a re-submission of the tender response.

Steps:

1. Export ESPD request



Save as:



File name:

Save as type: XML File (*.xml)

2. Go to European Single Procurement Document (ESPD)

<https://ec.europa.eu/tools/espd/filter?lang=en>

Who are you? ⓘ

I am a contracting authority ⓘ

I am a contracting entity ⓘ

I am an economic operator ⓘ

What would you like to do?

Import ESPD ⓘ

Merge two ESPDs ⓘ

Create response ⓘ

Upload document

Please upload an ESPD Request or an ESPD Response

C:\Users\CJarri\Documents Browse...

Where is your business located?

Select country

Fill in relevant information

Click Overview

Save ▾

You can now click on 'Export' to download and save the ESPD file on your computer. Contracting authorities must ensure that this ESPD file is available to the economic operators alongside the other tender documents.

Click download as

Choose XML format

Date 2017-06-19

Place stockholm

Signature

XML format

PDF format

Both formats

Save as:

File name:

Save as type: XML File (*.xml)

3. Import ESPD response

My response **Progress**

ESPD

Fill in your ESPD response Export ESPD request Import ESPD response ESPD response not imported!

ESPD Responses

No responses

Upload ESPD response Done

Upload ESPD response

+ Add files...

Upload Back

Upload ESPD response

+ Add files...

espd-response.xml (247 kB) ✕

File title (optional):

Upload Back

ESPD Responses

#	Name	Status
<input type="checkbox"/>	1091 espd-response.xml	

Delete Upload ESPD response Done



To attach documents:

As part of your response you can attach any documents which will be displayed to the buyer when reviewing your quotation.

1. To attach documents to your response, click the **[Attach documents...]** from the main response page. The upload page is shown.

My documents
0 document(s) attached

Attach documents...

The response has unsubmitted changes
Response last submitted: 31/10/2013 13:12

View/Print response form Withdraw response Submit response

2. Click the **[Upload files...]** button, select the documents to attach and click **[Upload]**. Files are uploaded to your quotation.
3. You may also copy documents from an archive i.e. the personal or the company folder or documents. Use the **[Add from shared folder]** to copy any documents to your quotation.
4. As the system does not check if any documents have been added or how many should be uploaded, you yourself must determine which documents you need to attach. The 100% progressbar will not reflect any missed/not uploaded documentation.



To submit the quotation

Once you have completed filling in your response, you should send the quotation to the buyer. No information about your response can be seen by the buyer until you have sent the quotation. To preview your response before sending it to the buyer, click the **[View/Print response form]** at the bottom of the response page.

To submit the response:

1. Click on the **[Submit response]** button. A pop-up is displayed with fields for your user name and password to be filled in.
2. For security reasons you are required to enter your user name and password before the quotation can be sent. Enter your user name and password and click the **[Send]** button. An automatic message is sent to the buyer informing him of your submission.
3. Once submitted you get a confirmation message on the screen. Close the pop-up to go back to your response page.

For some tenders the buyer may request you to digitally sign the quotation when sending it. If this is the case you need to have a valid digital certificate installed in your web browser and on your PC. Digital certificates are issued by third-party organisations such as VeriSign or DNV.

The buyer may let you submit without a digital certificate and use an extra solution as a replacement for certificate. After you submit you will have to print a submission

receipt which includes the unique hash key generated for your quotation. This receipt needs to be faxed or mailed to the buyer prior the end-time of the tender.

NOTE! There may be a setting within your company profile that only company signers can submit the quotation. If so the button will be grey. You'll need to contact the company signer of your company and allow him to submit.

4.2.3 *Offline editor*

The buyer can request you to fill in the proposal offline, encrypt and upload the signed and encrypted proposal. Your uploaded proposal will be stored encrypted on the servers until it is decrypted by the buyer when opening the tender box.

If the offline editor is used no response can be filled in online, everything has to be filled in using the Offline editor program.



Download the Offline editor program

Prior starting to work with the offline proposal you must download and install a small program called EUS Offline Editor, it enables you to start working with the offline proposal. Installation of the program is only needed once and once it is installed you can use the program for every offline proposal you need to fill in.

1. Go to the proposal and click the link at the top Download offline editor
2. Save the program to your local computer
3. Double-click the installation file downloaded and follow the installation instructions



Download, fill in the proposal and upload

The information from the buyer, qualification questions, BoQ items, etc. is stored in a file (*.opf) which you need to download and open within the EUS Offline Editor.

1. Go to the proposal and click the link at the button **[Download quotation]**
2. Save the opf-file to your local computer, remember where you place it.
3. Open the EUS Offline Editor program and use File -> Open and select the .opf-file download in step 2.

Roofing

Envelope 1

Document compliancy

Delivery and payment terms.doc

Question	My answer
Quality	
Does the company hold a quality policy	<input type="radio"/> No <input type="radio"/> Yes
If yes, please give the date when established and add the policy document	<input type="text"/>
Does the company work according to a Quality System	<input type="radio"/> Yes <input type="radio"/> No
If Yes, please give the date from when this was first used and add the QS document	<input type="text"/>

Compliant bid

Alternative bid

Document name	Size
<input type="button" value="Add..."/>	<input type="button" value="Delete..."/>

4. Now you can start filling in the quotation with answering questions, setting document compliancy, pricing and upload any documents. The proposal can be saved and re-opened as many times as needed
5. When completed you need to sign and encrypt the proposal. Select File -> Digitally Sign in the menu, select the local certificate in the pop-up and click Sign
6. The proposal are now signed and encrypted, the encrypted proposal is saved in an .epf-file together with a .sig-file and is stored in the location as the .opf-file. The .sig-file is your digital signature. Next step is to upload the signature file and encrypted proposal.
7. Go to your proposal page online and click the button **[Upload quotation]**. There are two steps to uploading (i) upload the signature, which will count as the legal time when you submit the proposal and then (ii) upload the actual proposal data including all documents etc. The proposal have to be uploaded together with the correct .sig-file it cannot be changed.
8. Click the **[Browse...]** button and select the .sig-file and click **[Upload]**. The signature file is now uploaded and your submission of proposal is time-stamped
9. To upload your full proposal with all data click the **[Browse...]** button in the same screen, select your .epf-file and click **[Upload]**. Depending on the amount of data within your proposal this can take some time. The full proposal is now uploaded and stored encrypted on the server until the buyer opens the tender box.

NOTE! Make sure you have viewing of file-extensions on your local computer to be able to see the .opf and .epf files.

4.3 Addenda

Changes as well as negotiation may continue throughout the entire process. The buyer can make changes until the RFT is closed. As a supplier you may make changes until End time quotation is passed or you are locked. All changes made are logged within the Audit trail.

4.3.1 Buyer makes changes

All changes made are logged and can be reviewed on the Audit trail tab. This way it is easy for all parties to see when and what changes have occurred. You can see information about the buyer and yourself in the Audit trail. To ensure that you are informed of the changes made the buyer has a feature to submit a notification of the changes made.



To view the Audit trail:

1. Click on the Ongoing link under My tenders in the Services menu of the home page. The list of ongoing tenders is displayed.
2. Click on the RFT description to view the tender response.
3. Click on the **[Audit trail]** tab. All activities are listed for that tender process.

Time (CET)	User / Company	Action	Text	Options
29/11/2016 10:58:48	Karen Aab KABuyer2	Answers to tender questions published	Question Id(s): 2187	
29/11/2016 10:57:36	Karen Aab KABuyer2	Tender updated		
29/11/2016 10:23:31	Karen Aab KABuyer2	Tender updated		
29/11/2016 10:22:56	Karen Aab KABuyer2	Tender updated		
29/11/2016 10:20:05	Karen Aab KABuyer2	Tender updated		
25/10/2016 14:10:42	Anna Smith KABuyer2	Answers to tender questions published	Question Id(s): 2152, 2153	
25/10/2016 14:10:07	Anna Smith KABuyer2	Answers to tender questions published	Question Id(s): 2150, 2151	
25/10/2016 14:06:38	Bosse Larsson KASupplier1	Question asked by supplier	Question: 2153-question??	

4.3.2 Adjustment of quotation

You may change your quotation until end time quotation is passed or you are locked.

When you make changes to the response you have to re-submit your quotation for the changes to be seen by the buyer. It is only the last submitted version that will be available and that will count as your submitted quotation.

In the same way as the buyer changes are displayed for you the buyer can follow your changes through his audit trail.

4.4 Messaging

A messaging system supports the logging and trail of any communication during the tender process. You can send and receive messages to and from the buyer.

On the first page after login all unread messages are listed to ensure that no messages are left unattended.

Messages	
09/12/2016 09:22	eu-supply TEST:Information about contract award for Dates localized/missing data in report → Contract
08/12/2016 10:15	Message to Supplier1 → Tender
08/12/2016 10:14	eu-supply TEST:You are intended for the award of RFT SWV Integration: Mappings for TenderMaterial by KA_SVV
Showing the last 15 unread messages All messages	

The messaging tab on a tender presents the communication taken place within a specific tender in a discussion forum format. To view a message, click on the subject. It is possible to filter out the system notifications from other tender messages by not ticking the 'Show system notification' checkbox and clicking on **[Apply filter]**.

 Draft  Has attachments

[My response](#) [Contracts](#) [Messaging](#) [Audit trail](#)

Select step: 1. Invitations only (direct t... Show system notifications **[Apply filter]** [New message...](#)

ID	Subject	From	Date (CET)
41182	eu-supply TEST:KASupplier1 accepted the invitation to RFT 19736:1 - Invitations only (direct tender), no publication	System message	13/12/2016 22:03
40661	eu-supply TEST:Invitation to RFT Invitations only (direct tender), no publication	ka_sw1 ka_sw1 (KA_SVV)	22/11/2016 14:12

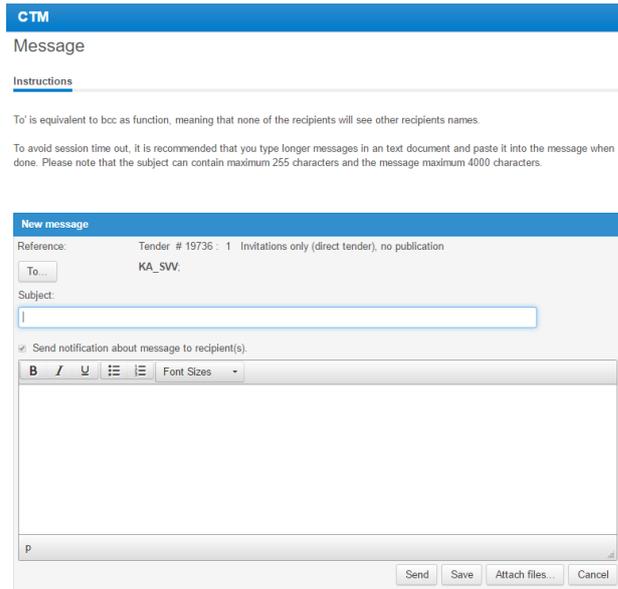
[New message...](#)

4.4.1 Send a message



To send a message within a RFT:

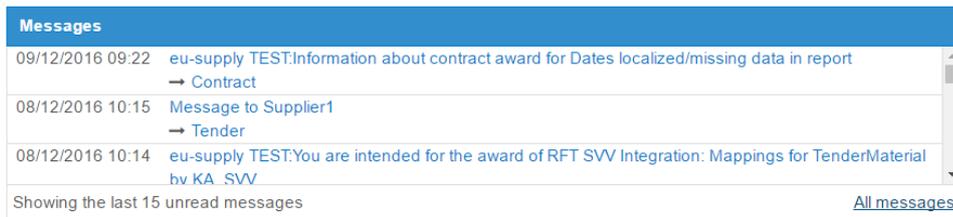
1. Go to the desired RFT and the **[Messaging]** tab.
2. Click on the **[New message...]** button.
3. The New message window is displayed.



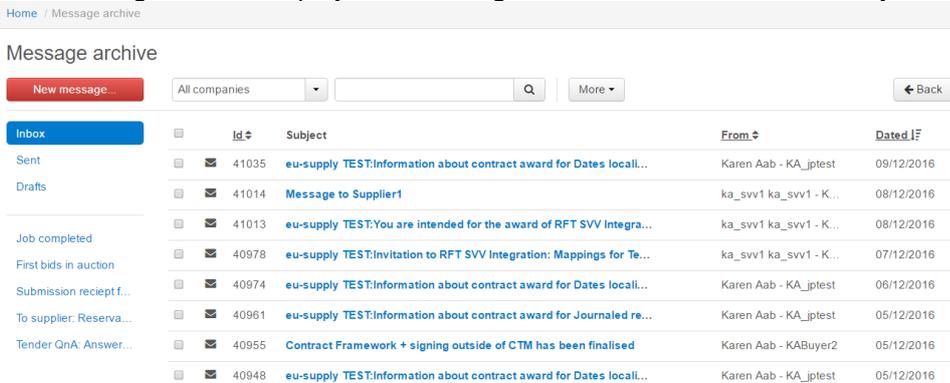
4. Enter the required subject.
5. To attach a document from the PC, click on the **[Attach files...]** button and select the file(s) to upload.
6. Click on the **[Send]** button to send the message.

4.4.2 Message archive

If you want to review all messages independent of tender you can use the Message archive. The Message archive is reached through the link [All messages](#) accessible from the home page.



The Message archive displays the messages in a traditional email client layout.



If a message is created and saved but not sent it is listed in the drafts folder in the Message archive.

If a message is deleted it is removed from the system. To delete a message first choose the message you wish to delete by ticking the checkbox. Then click on the button [More] located next to the search bar from the displayed dropdown click on Delete.

If you wish to show a message as read you should select it by ticking the checkbox, clicking on the [More] button and choosing 'Mark as read' from the displayed dropdown.

4.5 Award

Once the tender process is completed and the end time has passed the buyer will evaluate all incoming responses and select a preferred supplier. The preferred supplier is selected per package. It is only the awarded supplier who can go through to the contract phase. If the buyer is under the Alcatel directive the system will send an automatic email and system message informing you of the award or non-award. If the buyer is not under the Alcatel directive, no automatic message is sent from the system. The buyer will then manually send information about the awarded supplier.

Section 5: Contract Management

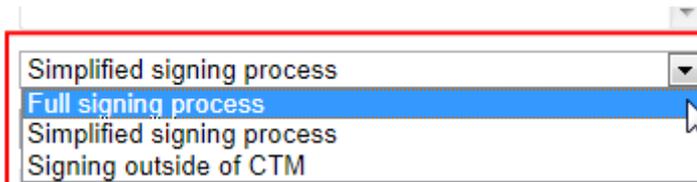
When and if you are awarded, a contract within the Contract tab is displayed.

The screenshot shows a breadcrumb trail: Home / My RFTs / RFT 21969. Below it is the text 'RFT 21969 - DK/TRV - Citybanan ventilationstrumma'. There are four tabs: 'My response', 'Contracts', 'Messaging', and 'Audit trail'. The 'Contracts' tab is active. Below the tabs is a table with the following content:

Contract	RFT details	Response	Status
DK/TRV - Citybanan ventilationstrumma	RFT details	Response	Contract awarded

There are several different ways of working with contract management within CTM, subsequently depending on which functionality the contracting authority selects. The buyer can choose to include the contract within the system in the following ways:

- **Full signing process** is the one explained in full in this manual, when both draft and final is sent and has to be confirmed within the system.
- **Simplified signing process** means that one version is sent and when confirmed by you its status is automatically set as signed.
- **Signing outside CTM** means that you will only be able to view the contract page in the system, which can be changed by the buyer at any time, and that the actual contract is only kept within CTM as pdf file. That is where all the legal details are listed. The buyer will manually set status as "signed" when he receives the signed paper copy from you.



When the buyer creates and sends the first version of the contract to you, it is always a draft version. Unless the contracting authority has chosen a function within the system which specifies that either buyer can only send one version, or that the signing is done outside of CTM and thus he will make changes within the CTM but it is always the paper version of the contract that is the legal one. If the two-step functionality is selected by the contracting authority it means that any changes the buyer does on the contract, he needs to resend the draft version to you for accepting prior to sending you the final version. The final version is always the same as the draft that was once accepted by the supplier.

In the same way as during the tender process there is complete tracking of activities and tools available for communication with the buyer. Online forms enable settling of variations, claims and disputes with the supplier. Messaging in general is also supported.

5.1 Communicate and sign contract

Communication and signing of a contract can be made online and thus logging all actions logged for later retrieval of exact flow of the signing. The signing starts with the buyer awarding one of the suppliers to the contract and sends a draft version of the contract to the awarded supplier. Again this depends on which functionality the contracting authority decides to select.

If you were not the awarded supplier for the contract you will receive a regret letter.

5.1.1 Receive a draft contract

When a draft contract has been sent to you, you will receive an automatic message informing you about the draft contract. This however depends on the selected option by the procurement officer that has the possibility to make the simplified process thus only sending the contract once for your approval instead of twice (draft version and final version)



To respond to a contract:

1. From the home page, click the link beneath the message or go in via the RFT and the **[Contracts]** tab, or go to one of the Contracts links in the Services menu located on the left-hand side of the home page.

Contract 13154 - Main contract

ref2 - Office supplies

ref2 - Office supplies			
Buyer	KABuyer2		
Version	Final	Status	Contract awarded

NOTE!The details of this contract can be changed by the authority. All legal details and signed for contracts are made outside of CTM

[Assign user rights...](#)

Instructions

This is the Main contract as approved by you. The authority has signed the final contract based on the version you approved earlier, and has been informed that you have received it.

Main contract [Amendments](#) [Messaging](#) [Audit trail](#)

Contract reference:ref2
Name: Office supplies
Description of contract from tender

Start date:13/12/2016
End date: 13/12/2017

Payment type
Fixed price

Main contract
Project: 7.5.3
Tender: 19706 - Weighting and scoring report (ActiveX)
Package:lot 1

Supplier
KASupplier1 [Response](#)
Vägen
18476
Göteborg

Contact person
Bosse Larsson
Phone: +46 234 134563

Buyer
KABuyer2
Road 11
1234567890PostalCode1
Stockholm

Owner
Karen Aab
Phone: +44 563 1234767
✉ karen.aab@eu-supply.com

[Print...](#)

2. From the **Main contract** tab you can see the contract details and if the contract has a preceding tender. To respond to the contract draft, click the **Respond** button.
3. A small pop-up is displayed. Click the **Acknowledge** button if you agree with the contract details, use the **Decline** button if you do not agree with the contract details. An automatic message will be sent to the buyer informing them of your decision. If the buyer has requested you to digitally sign the contract, you'll first need to upload a digital certificate within your user profile to be able to use that certificate to sign the contract.
4. You have the possibility to Assign user rights, meaning that if the contract owner and signer should be somebody else then you should change this in the system.

Click on the **Assign user rights** button.

Contract 13154 - Main contract

ref2 - Office supplies

ref2 - Office supplies			
Buyer	KABuyer2		
Version	Final	Status	Contract awarded

NOTE!The details of this contract can be changed by the authority. All legal details and signed for contracts are made outside of CTM

[Assign user rights...](#)

Start adding members to the contract by clicking on button **Add/Remove members**.

Select person you wish to add and move him with the arrow to the right hand side. Please save your changes.

To change the owner of the contract click on the **Change owner** button.

Select the person that should be the new owner and click on Save.

Select	User	Administrator	Editor	Limited editor	Viewer	Limited viewer
<input checked="" type="radio"/>	Anna Doe		✓			
<input type="radio"/>	Bosse Larsson	✓	✓			

The owner of the contract has now been changed.

To assign the user who will be responsible for the contract click on the **Assign responsible** button. Choose the user in a similar way as you did for the owner change and save the changes.

5.1.2 **Receive a final contract**

If the buyer changes anything regarding the contract after you have acknowledged the draft, he has to re-send the draft and you have to acknowledge it again.

When you have acknowledged the draft version of the contract, the buyer can flag the contract as final and send the final version to you.



To receive a final contract:

1. You will receive an automatic message when the final contract is received.
2. In the contract list, you see that the status of the contract is “Final contract sent”. To view and also send an automatic message to the buyer, just click the link of the contract in the list. By viewing the contract the buyer is informed that you have seen the final contract.
3. Once you have viewed the contract, the buyer cannot change anything within the master contract, and the contract is signed.

5.2 **Contract amendments**

Once the final contract is signed there can still be changes and amendments made in the contract. The amendments are handled within the **[Amendments]** tab accessible from the contract details page. An amendment is initiated by the buyer. Amendments are handled with the same draft and final version as contract.

Any changes made and actions performed regarding the contract are logged in the audit trail of the contract. The audit trail is accessible from the **[Audit trail]** tab.



To answer an Amendment:

1. You will be sent an automatic message when an amendment to a contract is received.
2. Amendments are displayed on the supplier side under a separate **[Amendments]** tab. Click the link of the amendment name.
3. Click the **[Acknowledge]** button if you agree with the variation details, use the **[Decline]** button if you do not agree with the variation details. An automatic message will be sent to the buyer informing about your decision.
4. Once the amendment is acknowledged the buyer will need to re-flag it to final and send the final version. Same approach as for contracts are used for amendments.

5.3 **Messaging**

During and after the contract is signed you can send messages to the buyer of the contract. The sending of messages are made in the same way as for messaging within the RFT, see section [Messaging](#)

Section 6: General user information

6.1 Sid4Health

For the NHS sector clients(only) there is a possibility to use the module that integrates with Sid4Health. q examples. If you are a supplier within the NHS sector and do NOT see any of these buttons it means that this particular Procurement office is not using the Sid4Health integration.

If the Sid4Health module is on:

As supplier you should complete the DUNS number in your profile, either when you register or later as part of changing your profile through company administration interface.

Company details

Membership

Select membership *

Click on the links for more information.

Supplier [Read More](#) [Preview](#)

Type of Organisation *

Private Company

DUNS number:

DUNS number is a unique digit, recognized as the universal standard for identifying and keeping track of companies.

123456

When responding to an actual quotation there are the extra fields to be completed under “Enter Sid4Health information”. Click on the button [Enter Sid4Health] to enter the information about DUNS and Profile Id.

My Response [Contracts](#) [Messaging](#) [Audit trail](#)

Quote/tender Dates (CET)

View quote/tender Access documents Assign user access Response deadline 20/02/2017 12:00

My response Progress

test dy test dy

Sid4Health information

Profile Id: 1234567

DUNS number: 123456

Total price (SEK)

Price:1,000.00

Alternative price:-

Additional response documents

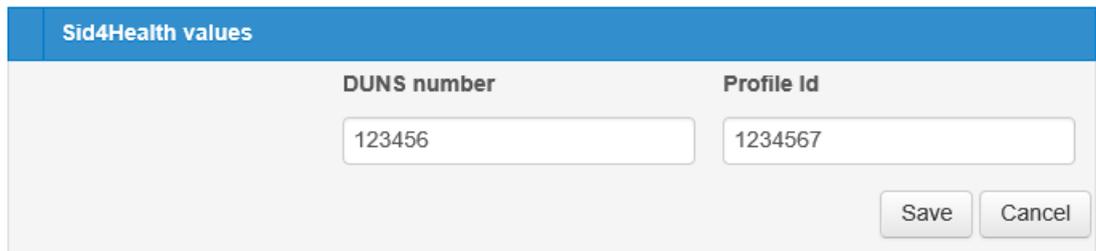
0 document(s) attached in this section

Percent complete

100%

Response submitted: 28/12/2016 11:54

See below the page that opens to enter the DUNS number and profile id.



The screenshot shows a web form with a blue header bar containing the text "Sid4Health values". Below the header, there are two input fields. The first is labeled "DUNS number" and contains the value "123456". The second is labeled "Profile Id" and contains the value "1234567". At the bottom right of the form, there are two buttons: "Save" and "Cancel".

6.2 Questions and Answer (Q&A) module

The Q&A (Questions and Answers) is a module used by some contracting authorities which allows for a separate function of answering questions from suppliers and broadcasting the answers to all parties. This can then be used similarly as Messaging functionality but more as a broadcasting board of supplier queries. All functionality within messaging in a tender is still available.

The process is as follows: the suppliers asks questions during the tender, the contracting authorities have the possibility to revise the questions to remove any specific supplier information and then publish the answers to all suppliers. The published answer and the question is available to any supplier who has expressed interest in a tender.

The supplier will not have the possibility to ask any questions once the deadline for clarification questions has passed. The deadline is set up by the contracting authority in each tender, if no deadline is specified then the suppliers can ask questions until tender deadline.

When the authority want to send information to all participating suppliers within the QnA module, there is a possibility for the authority to ask a question and write an answer and then publish it together with the rest of the answers to clarification questions. The supplier cannot tell difference between questions asked by the authority and questions asked by other suppliers.

The authority cannot ask questions after the deadline for asking questions has passed.

6.2.1 User view

The supplier will access the questions and answers from the response tab, see image below.

My Response Contracts Messaging Audit trail

Tender

View tender Access documents **Supplier questions and answers** Assign user access

The supplier will find the list of his questions asked and those answered questions that have been published by the contracting authority.

Tender 19736 - 16/1754 - Invitations only (direct tender), no publication

Instructions

In this page you can find answers to all the questions asked by suppliers during the tender. You can also see your own questions that's still unanswered.

Click on a question-row to see the question details and answer to the question.

Questions and answers

Id	Subject	Sent date	Answer date
2198	Question regarding attachments	16/12/2016	16/12/2016

Ask question Print Back

Once the contracting authority publishes answers to questions, the current supplier owner of the tender response will receive an email notification. Suppliers not part of the tender can see all questions and answers within a tender that has been asked and answered.

There is also a printer friendly version of the Q&A section, accessible via the **[Print]** button.

6.3 Edit user profile

You as the logged in user have access to settings and the details regarding your user profile and can also change them on the site.



To edit user details:

1. Click on your profile at the top of your first page (Home)

CTM Administration Doniasupp Help Log out

Home / Users / User details

User details Doniasupplier 2 seller22

Instructions

From this page you can update user personal settings and profile

User details

Name: Doniasupplier 2 seller22

E-mail: tbeergrehn@yahoo.com Timezone: CET

Settings

User profile Edit
Edit details of the user profile such as contact information and roles.

ActiveX settings Edit
Manage ActiveX controls used on the marketplace.

System modules View
View installed system modules

Done

2. Click on the Edit link by the User profile to change user details, such as user name, password, time zone, notification settings, preferred language etc. Change the settings and click **[Save]**.



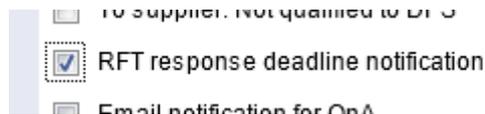
Notification settings

****Subject to SPS license***

Notifications are events happening on the system and how you would like to be notified about them. A system message is always sent for a notification, you can choose for each of the notifications if you would like to receive an email as a notification as well.

You can also chose to receive get an email notification about responses expressed interest in, but not submitted any response. The email notification is sent five (5) days before the tender dead line and only once.

Each supplier user can set up in his user profile if he would want the notification warning. Setting to Yes, will send the warning for all tender responses.



The supplier user will get the email warning if:

- He is the owner of the response
- He has expressed interest, but not submitted a response
- He has submitted response, but changed the response after submission.

By default for new users and suppliers this is set to Activated. By default for existing users this is set to disabled.

Digital certificate

Digital certificates uploaded to your personal profile can be used to sign contracts, logging in or digitally sign an encrypted proposal.

Certificates for signing contracts and logging in:

1. Go to edit your user profile by click the Edit link

2. Select the certificate type and click **[Choose certificate]**. The system will display a pop-up with your locally installed certificates.

Authentication method:
Additional authentication is required to be able to log in.

Please select authentication method below

Qualified digital certificate is not necessary on your profile. This can be selected when leaving an offer instead.

Bypass Smartkort

 A valid digital certificate is required to be able to login.
Please click button below to specify the certificate you would like to use.
(No privately stored information will be used, only the public part of your certificate.)

No certificate specified

3. Select the certificate to upload and click OK
4. **Click on SAVE** otherwise it will not be saved and functioning

Certificate used for encryption and signing of offline proposals

1. Within your user profile, click the **Upload** link next to Certificate. The system will display a pop-up with your locally installed certificates.
2. Select the certificate to upload and click OK

Active X settings

ActiveX is control which can be downloaded and installed on your computer to gain access to additional functionality within CTM, the ActiveX's are only available on a client Windows platform using the Internet Explorer as web browser. To be able to install the ActiveX you need to have access to install programs on your computer, i.e. being a power user or computer administrator.

User details	
Name: Doniasupplier 2 seller22	
E-mail: fdsafwrweqfids@fidsa.uk	Timezone: CET

Settings	
User profile Edit details of the user profile such as contact information and roles.	Edit
ActiveX settings Manage ActiveX controls used on the marketplace.	Edit
System modules View installed system modules	View

To install the ActiveX's one by one, click the **[Load]** button next to each of the ActiveX. You can also install them all by downloading the complete installation package and install. You can find this under your user details

ActiveX controls settings

Instructions

This page displays the ActiveX controls installed on your computer and the latest versions available on the marketplace. If you have an older version, the action column will display a button labeled 'Load'. If you click the button, the installation begins automatically in order to update the control.

If a dialog box appears during installation, ensure that EU-supply is selected as the distributor before clicking 'Yes' to complete the download.

Microsoft Internet Explorer may have problems updating the control resulting in the browser being closed. In that case, please restart the browser and return to this page to verify that the control has been updated.

If you do not want to use an ActiveX control, please uncheck the checkbox next to the control and click 'Save'.

ActiveX installation package

Click on link below to download an installation package for all ActiveX controls.

Before running the installation application please make sure all open Internet Explorer windows are closed.

If you are upgrading existing ActiveX controls also make sure the EU-Supply Queue Manager application is closed and not present within the tray (the area near the clock) before upgrading.

 [EU-Supply ActiveX Installation Package \(.msi\)](#)

 [EU-Supply ActiveX Installation Package \(.zip\)](#)

Control	Status	Version installed	Version available	Size (kB)	Action
<input checked="" type="checkbox"/> Upload Manager	Missing	3.0.2.0	3.0.2.0	362	
The Upload Manager ActiveX control improves uploading of documents to the marketplace by enabling upload of compressed, hierarchical, multiple documents.					
<input checked="" type="checkbox"/> CAPICOM	Installed	-	2.1.0.2	184	<input type="button" value="Load"/>
The CAPICOM ActiveX control from Microsoft is used to create digital signatures.					
<input checked="" type="checkbox"/> Flash	Installed	11	-	NaN	<input type="button" value="Load"/>
The Flash ActiveX control from Macromedia is used to display enhanced graphics.					
<input type="checkbox"/> Digital Signature Utility	Installed	1.0.0.2	1.0.0.2	42	
The Digital Signature ActiveX control enables you to digitally sign documents as well as verifying documents being digitally signed.					
					<input type="button" value="Save"/> <input type="button" value="Done"/>

If you do not have access to install programs, you can download an installation package and ask your local support to install the ActiveX-package.

The below ActiveX's are currently available for the suppliers/contractors, some of the other Active X are only for purchasing authority.

ActiveX	Description
Upload manager	The upload manager is a tool to upload multiple files and folder structures from your local disk to any of the document archives on the system. Developed by eu-supply
Chart FX	The Chart FX is used within the eAuction module to display a graph of bids which has been placed during an auction Developed by Software FX
CAPICOM	The Capicom is used to create digital signatures to be used on the site Developed by Microsoft
Flash	The Flash is used to display graphics, for example in a supplier profile and the map-chart. Developed by Macromedia
Digital signature utility	Digital signature utility allows you to digitally sign documents and supplier responses on the site. Developed by eu-supply

6.4 Document folders

**Subject to SPS license*

The Document folders enable storage of documents on the system for use in RFTs or quotations without having to upload the same document multiple times.

The following document folders are available:

- *Company document folder* – The place to store documents that are shared throughout the company and used in RFTs.
- *User document folder* – The place to store your personal documents. They are not available for other users.

When you answer an invitation and upload document, folders and documents can be copied from the above folder to the response. Note that the document will be copied, not linked. Any changes made to the document within the folder will not affect the response



6.4.1 Upload documents from PC

Documents can either be uploaded directly or scheduled to take place during off office hours if large amounts of data are about to be uploaded.

Uploading documents from your PC to the company archive, without Upload Manager (default value)

1. From the home page, click on the link [Documents](#)
2. Click on the **[Upload files...]** button.
3. Click on Browse and choose the document you would like to upload
4. Click on the **[Upload]** button and then **[Back]**

Uploading documents from your PC to the My Documents section in a tender, without Upload Manager (default value)

1. From the home page, open the tender start page
2. Click on the **[Attach documents...]** button.
3. Click on Browse and choose the document you would like to upload

6.4.2 Upload several documents at the same time from your PC

An optional feature, called **Upload Manager**, in CTM makes it possible to upload several document at one time, if using Internet Explorer as a browser. An installation is required on the PC.

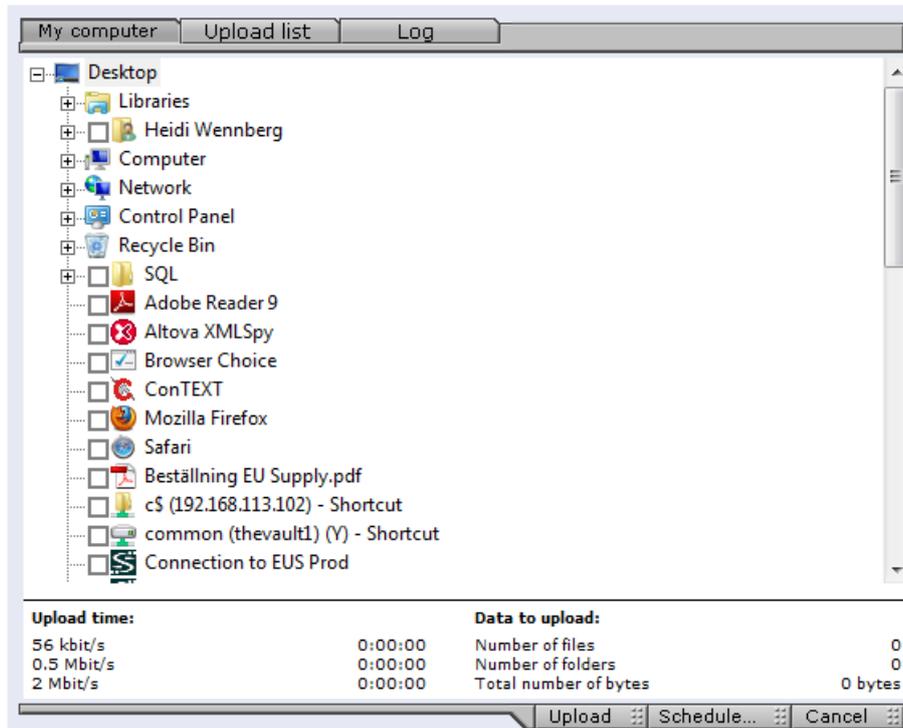
Install the Upload Manager to your PC: (see also previous section regarding Active X)

1. Click on User profiles (if you are an administrator, otherwise, click on Your own Personal Profile)
2. Click on your name (if you are an administrator, otherwise this step is skipped) from your personal profile.
3. Click on Edit next to Active X settings
4. Click on msi-package link down to the left and run the application (1). After the installation is done the Upload Manager will go green (you might need to refresh), then tick the box in front of Upload Manager (2) and click Save.

Make sure Upload Manger is only ticked if installed (green), otherwise the system will try to use a function that isn't installed and this will cause that upload/download doesn't work.

Uploading documents from your PC to the My Documents section in a tender, with Upload Manager:

1. From the home page, open the tender start page
2. Click on the **[Attach documents...]** button.
3. This presents the Upload Manager where files and/or folders can be selected.



4. Choose documents/folder to be uploaded by ticking the boxes in front of the document/folder name
5. Click on the **[Upload]** button and then **[Done]**

Sometimes the documents aren't visible right away. The reason for this is that the upload is put in a queue. In that case, wait for 10-15 minutes and then look if the files are uploaded.

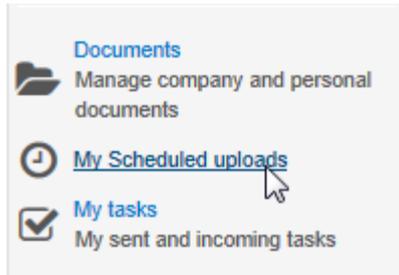


To schedule an upload of documents:

1. From the home page, go to the archive/folder to upload documents to.
2. Click on the **[Upload files...]** button. Select the files to upload.
3. Click on the **[Schedule]** button. In a window you can set the time of the Upload. Your computer will then, if connected to the Internet, start the Upload at the desired time.

NOTE! The PC must be left on with an open internet connection for the schedule upload to be able to start.

If you want to cancel a scheduled upload or review status of them, click on the Scheduled Upload link on the main page. Or click the  in the tray of your PC.



A window is displayed listing the jobs that have been scheduled and their status.

6.4.3 Upload document to a specific question in the Questionnaire

Sometimes the buyer requires that a document is attached as a compliment to an answer.

4. From the home page, open the tender start page
5. Click on the [Answer questions...] button.
6. Answer the question and click Save at the top
7. Click on the document icon (folder)
8. Click on [Upload files...] button
9. Select your document and click on the [Upload...] button and then [Cancel...] to exit.

6.4.4 Version management



To upload a new version of a document:

1. Select a document in the list and click on the [Edit...] button.
2. The document details are displayed.
3. Click on the [Upload new version...] button to upload a new version of the document.

The action list for all RFTs including this document will now include an entry regarding the change of version.

6.5 Reporting

The CTM application supports different types of reporting. If running the solution using own HW infrastructure there is the possibility to develop any own reports desired. If running hosted we can also provide reports meeting almost any needs.

The standard configuration includes a set of reports using XSL/XML or Excel. We are happy to tailor additional reports using this technology or integrate standard reporting tools on a need basis such as Crystal Reports or Business Objects.

The reports setup is reached from the home page.



6.6 Digital signing

If the contracting authority has requested that you sign your response with a digital signature.

1. Click submit response
2. Choose signing method
3. Sign with your CTM user login details
4. Choose certificate if you requested to use a digital certificate

Instructions

To submit response:

Please allow some time for sending of your response
After clicking 'Submit response' you will be required to verify yourself by entering your user name and password before sending. If you can't see the pop up window when submitting your response it could be minimized. Check among your minimized windows or log out and close your browsers and try again.

Detailed instructions

Submit with a digital signature:
The contracting authority has requested that you sign your response with a digital signature.

Response submitted: 28/12/2016 09:46

Time left: 15385:48:28

My Response **Contracts** Messaging Audit trail

RFT Dates (CET)
Response deadline 30/09/2018 12:00

View RFT Access documents Supplier questions and answers Assign user access

My response Progress

test digital signatur

Total quote (SEK)
Compliant quote:12.00

Additional response documents
0 document(s) attached in this section

Percent complete
100%

Response submitted: 28/12/2016 09:46

View/Print response form Withdraw response **Submit response**

Select signing method

Norwegian BankId ?

NEM ID is not yet available but will soon be released. ?

Installed certificate ?

RFT 29037 - Internet Explorer

https://edu.eu-supply.com/app/rfa/sendquotation.asp?PID=32691&UID=6425&m

If you select to submit your response with a digital signature a new window will open allowing you to select the certificate to use for signing your response.

If you select to submit your response without a digital signature, you can print, sign and scan a letter of authentication and send it through the messaging tool to the contracting authority before response deadline! Please note that some contracting authorities may deviate from this, see the invitation letter or the documentation for additional information.

If the system prompts you to accept a signed applet from Bouncy Castle, please do so as it is a trusted third party component.

Verification

User name

Password

Each time you submit your response it will be sent to the Contracting authority. However, access for the Contracting authority to the final response is restricted and depends on legal requirement regarding response deadline/opening procedure.

Select the certificate you want to use and click Ok

Select certificate

Select certificate below. This certificate will be used for signing

Issuer	Issued to	Valid to	Thumbprint
cjarl	cjarl	2114-feb-22	32 C3 D1 87 B5 07 69 4...
Entrust Certification Au...	dev.eu-supply.com	2015-jan-22	3C 4C FA 81 19 8B 04 5...

Response successfully sent to the buyer!

Click the button below to go back to your response details

Close window

Suppliers have the possibility to view the certificate used for signing

Certificate

Subject
Name: SELISSON-PC.EUS.local E-mail: - Universal principal name: - Domain name system: SELISSON-PC.EUS.local Details: CN = SELISSON-PC.EUS.local
Issuer
Name: SELISSON-PC.EUS.local E-mail: - Universal principal name: - Domain name system: SELISSON-PC.EUS.local Details: CN = SELISSON-PC.EUS.local
Valid
2016-06-10 15:40:51 - 2017-06-10 01:00:00
External validation result
Verification timestamp: n/a

Section 7: E-Auction

7.1 *Confirm your first bid into auction*

The Buyer has prepared the auction and your first bid according to previously sent in bid/price during tendering process or other. If E-auction is performed as result of made tender in the system then the total bid entered previously into the system would be the first bid entered into auction.

As, supplier (participant in auction) You must validate that this is the correct bid to be entered, this cannot be changed afterwards other than lowered according to decrements set up by buyer as it is a reversed auction.

Validate first bid(s) - Procurement of office supplies

Instructions

The authority has entered bids on your behalf. Please validate these bids by selecting the appropriate answer and clicking the 'Send Answer' button.

Bids	
Package	Bid (SEK)
1. Procurement of office supplies	102,000.00
The authority has entered the following initial bids for your company. Do you validate these first bids? <input checked="" type="radio"/> Yes <input type="radio"/> No, I will contact the authority via telephone	
<input type="button" value="Send answer"/> <input type="button" value="View tender details"/> <input type="button" value="Cancel"/>	

Send answer if bid is correct as your official first bid.

You then get to a screen where you can see your bid and time left until auction starts
 This example shows EAuction with one lot/package.

Tender 19899 - Procurement of office supplies

Number of bidders:

Instructions

Time to online bidding starts:

0:27:34

Bidding	Contracts	Messaging	Audit trail
Package	(Reverse auction)	Best bid (SEK)	My current bid (SEK)
1. Procurement of office supplies		-	102,000.00
Page updated 28/12/2016 00:32			
<input type="button" value="Assign user rights..."/> <input type="button" value="View tender details"/> <input type="button" value="View all bids"/> <input type="button" value="Refresh"/>			

Once auction has started you can place bids, you can also see on instructions at top of screen what the rules are around this auction.

7.2 Start of auction/enter bids and automatic warnings

See below the Supplier view IF the buyer has set that ranking should show, buyer can also set that other bidders prices show. Nobody does however at any time see other bidder's names.

Supplier can also see that bid decrement is 00.20% and so on, on below example it is the new best total bid that wins. Thus in order to be able to place the bids, the total of the bids in different lots must be lowered by 00.20% of the total bid value (lowered by 290 in total of the different lots in example below)

Extension time is 420 seconds in this example meaning if any supplier places best bid (winning bid) just upon deadline of auction the entire auction will be prolonged by 420 seconds giving the other bidders a chance to respond. All these settings/**Instructions** are determined by the buyer for each auction.



Tender 19899 - Procurement of office supplies

Number of bidders: 3

Instructions

Intention to award by package
 Min bid decrement: 00.20 % for each package
 Decrement applied on: Your best bid
 Extension time: 420 seconds
 Extension time triggers on: Any new bid
 Time to Online bidding ends:
 0:22:02

Bidding Contracts Messaging Audit trail			
Package (Reverse auction)	Best bid (SEK)	My current bid (SEK)	New bid (SEK)
1. Procurement of office supplies	100,000.00	102,000.00 (Rank: 2)	<input type="text"/>
Page updated 28/12/16 00:37			
<input type="button" value="Assign user rights..."/> <input type="button" value="View tender details"/> <input type="button" value="View all bids"/> <input type="button" value="Place bid..."/> <input type="button" value="Refresh"/>			

The supplier places an extremely lower bid (bid was 102000 new bid 70000). Supplier gets warning, and needs to confirm that the bid should be that much lower.

Time to Online bidding ends:

Confirm bid

Package	Your last bid (SEK):	Your new bid (SEK):
1. Procurement of office supplies	102,000.00	! 70,000.00

The bid is more than 25 % lower than your previous bid(s). Are you sure you wish to place this/these bid(s)? If yes, click on "Confirm bid". If no, click on "Cancel" and you will go back to the previous page.

You are about to enter a legally binding bid. If this bid is correct, press 'Confirm bid' otherwise press 'Cancel'.

He cancels and places new corrected bid which is 90000. Then makes another bid of 89999 - see below the warning shown to supplier due to too low decrement.

Time to Online bidding ends:

0:14:36

Confirm bid

 Package 1: Bid higher than minimum decrement (0.2%). Please place a new bid.

Package	Your last bid (SEK):	Your new bid (SEK):
1. Procurement of office supplies	90,000.00	<input type="text" value="89,999.00"/>

 You are about to enter a legally binding bid. If this bid is correct, press 'Confirm bid' otherwise press 'Cancel'.

Click cancel and go enter a new bid as displayed below (80000). The new bid does not interfere with the required decrement and no error messages are shown. Confirm the bid to submit it.

Time to Online bidding ends:

0:11:24

Confirm bid

Package	Your last bid (SEK):	Your new bid (SEK):
1. Procurement of office supplies	90,000.00	80,000.00

 You are about to enter a legally binding bid. If this bid is correct, press 'Confirm bid' otherwise press 'Cancel'.

In case you make a bid that already has been made you will see the following error message. This is only applicable if the authority has required that no same bids are allowed when setting up the eAuction.

Time to Online bidding ends:

0:05:41

Confirm bid



Package 1: Bid higher than minimum decrement (0.2%). Please place a new bid.

Package 1: The bid cannot be placed since an equal bid already exists. Please change the bid.

Package	Your last bid (SEK):	Your new bid (SEK):
1. Procurement of office supplies	80,000.00	<input type="text" value="80,000.00"/>

 You are about to enter a legally binding bid. If this bid is correct, press 'Confirm bid' otherwise press 'Cancel'.