

eTendering
End User Support Materials

Publications Office

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1. Definitions, Abbreviations and Acronyms

Abbreviation and Acronyms

Abbreviations and acronyms.

Cft	Call for Tenders
GUI	Graphical User Interface
PDF	Portable Document Format
UI	User Interface
UTF-8	UCS Transformation Format 8 bits

Definitions

Definitions

Authorizing officier	Highest position in the eTendering hierarchy. The Validator is responsible for the nomination of the Procurement Officer.
Contracting authority	Entity that publishes a tender and will evaluate the bids
Call for Tenders	An invitation for suppliers, through a bidding process, to submit a proposal on goods, works or services.
Economic Operator	Supplier who participates in the Call for Tenders process and bids for product delivery or service realisation.
Editor	Has limited rights to edit public procurement notices, and view PDF notices on SIMAP.
eNotices	On-line tool for preparing public procurement notices and publishing them in the Supplement to the Official Journal of the European Union.
Public Area	The Public Area is the extranet part of the eTendering System, accessible to the Economic Operators.
Public Area User	The Public Area User is the actor who accesses the public part of the eTendering System.

2. Accessing eTendering

This section describes the constraints and the way to access to eTendering

2.1. Technical constraints

The eTendering Application has the following technical constraints:

Browser Compatibility	For the first and second iterations, the application is tested with Microsoft Internet Explorer 7 and Mozilla Firefox 3. Ultimately, the application will be tested with following browsers: Microsoft Internet Explorer 6, 7 and 8 and Mozilla Firefox 3.
Multilingualism	eTendering must support multilingualism (23 languages).
Character Set Encoding	UTF-8.
Screen Resolution	Minimum 1024x768 pixels.
JavaScript	The application can run with or without JavaScript.
Accessibility	The application is respecting the accessibility guidelines defined in Web Content Accessibility Guidelines 2.0

3. User Interface Features

The user interface features are restricted to the possibilities achievable with a supported web browser (see Technical constraints). The UI functionality of the eTendering application is the same as found on other regular web pages. The eTendering application cannot support other methods users may be familiar with in other non-web based GUI-applications, e.g. no support for drag-and-drop functions.

3.1. Home page

This page is the home page of eTendering.

This page contains a description of the purpose of eTendering and explains how to benefit of it.

3.2. Performing actions

Buttons

The table below shows the used functions and the related buttons. The normal buttons are usually used in the button bar at the bottom of the Work area.

Save	Saves the changes of a record and opens the current page in consultation mode.
Clear	Resets a form to the default values for that form. All changes made by the user since the last save are discarded.
Search	Executes a search.
Cancel	Closes the current page and returns to the parent page in the navigation map. Cancels the current action if not already submitted or saved.
Calendar	Opens the calendar popup.

Keyboard

To submit a form for executing an action, the user should always press the corresponding button for this action. As far as possible, pressing the RETURN key invokes the first button on the page. Pressing the TAB key navigates between the different screen elements within a page (buttons, input fields, links etc). This can be a useful way to navigate without using the mouse however the exact behaviour is browser-dependent and may not always work as expected.

3.3. Working with forms

Forms must be filled in with data. Six types of input fields exist in the eTendering Application:

- Text input fields to enter text;
- Drop down menus to select one option out of a list;

- Multi-selection lists to select one or more options out of a list. To select more than one option, hold down the Ctrl-key and click on the options. To select a continuous range of options, hold down the Shift-key and click and drag on the options. The Ctrl- and Shift-key usage can be combined;
- Radio buttons to select a unique option from a set of possible options;
- Check box buttons to select a unique option from a set of possible options;
- Calendar icon to open the calendar popup allowing selection of a date.

Save	Saves the changes of a record and opens the current page in consultation mode.
Clear	Resets a form to the default values for that form. All changes made by the user since the last save are discarded.
Search	Executes a search.
Cancel	Closes the current page and returns to the parent page in the navigation map. Cancels the current action if not already submitted or saved.
Calendar	Opens the calendar popup.

3.4. Calendar

Next to date input fields, a calendar icon is available.

Clicking this icon opens a Calendar popup in which the user can navigate to a date. Clicking on it puts the selected date in the date input field.

3.5. Features of list tables

Sorting

List tables provide a feature to sort the data by one column.

(Sorting columns are indicated by a double arrow image next to the header.)

The default sort column is always the first column. If the user clicks in the header of a column, the table is sorted by this column. The sort direction is ascending. If the column is already the sort column and the user clicks a second time on the header, the sort order is descending. If the user clicks more than once, the sort order toggles between ascending and descending.

Paging

To delimit the number of entries of a list table shown on one page, the table provides a paging feature. The paging bar is positioned at top of the result table.

The left side of the paging bar shows the total number of records returned and the record range shown in the result table, whereas the right side of contains the paging function. The user has two possibilities to choose a page:

- Choose the number of the page directly in the paging bar: each page number is a normal hyperlink. A maximum of eight pages are shown: the actual page is highlighted. The link of the actual page is not active. If the page has less then two predecessors or successors, more pages

are shown in the other paging direction. This is comparable to the Google paging2 ;

- Browse with the navigation hyperlinks. The user can move to the previous, next, first or last page respectively. If the user is on the first or last page respectively the corresponding links are not active

Sorting a paged result table

If a result table is paged, the sorting functionality sorts the whole result table and displays the selected page with sorted results.

3.6. Access rights & business rules dependencies

Depending on the user's access rights and business rules some buttons and fields are disabled or don't appear on the screen in certain circumstances. See the detailed Use Cases in the Functional Specifications Document for more detail.

3.7. Error handling

Constraints and business rules for the input values of the form fields are checked and if necessary an error message is shown to the user.

See the detailed constraints and business rules in the Functional Specifications Document for more detail.

Upon failure in the provided data, the validation error message is sent back to the client. The input form is displayed again with the filled in data and any error message is displayed under the affected field directly in the form in a highlighted colour. In case error messages are not related to a specific input field (for instance, a global validation involving several form fields), these messages are displayed at the top of form in a highlighted colour. In case of failure, the requested action is not executed, i.e. the data is not saved.

3.8. Confirmation when changing page

When the user is navigating away from a page with modified fields a popup window is opened to inform the user he's leaving the page with unsaved data.

Pressing 'OK' for the confirmation executes the display of the requested page.

Pressing 'Cancel' executes no action and the user can continue to work with the current page.

3.9. Edit and Consultation mode

Whenever a user arrives in a screen and has the privilege to modify its data, an Edit link is available.

Once click, the user can start editing the data and then click on the Save button to commit changes or click on the Cancel button to cancel current modifications.

In the case when the user does not have the privilege to change the data, these links/buttons are not available.

Also depending on the user's access rights and the phase in the workflow some (parts of the) screens will only be available for consultation. In this case, the editable fields are disabled or

replaced by labels depending on the type of widget.

3.10. Site map

The site map is accessible from the header and the footer bar of the website.

This page contains an overview of the eTendering website.

It explains how the eTendering application is divided. When relevant, a link to the functionality is available.

4. Functionality in public area

This section describes all the common functionalities available in the eTendering Public Area application. Each function is described as follows:

- A short description of the functionality described in the section;
- A description of how to navigate to that form, and pre-conditions, if any;
- A detailed description of the functionality, such as fields displayed, available actions, possible error messages.

4.1. Economic Operator login

In order to be able to use some options on the eTendering website, you will need to log in. Make sure that you already have a user account on the European Commission's Authentication Service(ECAS).

The login form is accessible from every page on the left menu above the Action Menu.

4.1.1. Economic Operator Account Migration

This fonctionnality allow you to associate your old eTendering account to your European Commission's Authentication Service(ECAS) account.

E-Mail	Email address linked to the old Economic Operator account. It is used to send the migration confirmation mail.
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4.2. Economic Operator registration

This functionality allows an economic operator register on eTendering, but need to have a European Commission Authentication Service (ECAS) account.

Once registered, the user will be able to subscribe to Call for Tenders, download documents without captcha challenges.

In order to register, click on the link [Subscribe to Call for Tenders in the Action Menu](#).

E-Mail	Email address of the economic operator. It is used to send the activation code, and after that to login eTendering. (automatically retrieved from ECAS account)
E-Mail Confirmation	Confirmation of the e-mail.
First name	First name of the economic operator. (automatically retrieved from ECAS account)
Last name	Last name of the economic operator. (automatically retrieved from ECAS account)

Telephone	Telephone number of the economic operator. (automatically retrieved from ECAS account)
Fax	Fax number of the economic operator.
Organisation Name	Name of the organisation to which the economic operator belongs to..
Address	Address of the economic operator organisation.
Captcha	A text to retype in order to prevent automatic registration.

Click on "Save" button to register or click on "Cancel" button to abort the registration.

A few minutes later, the system has sent an email to the registered email.

For completing the registration process, click on the activation link provided in the email.

The possible errors in this page are the following:

Email	Message: The E-Mail field is empty. Cause: An email is mandatory.
Email	Message: The E-Mail is syntactically invalid. Cause: The provided email is not syntactically valid.
Email	Message: The E-Mail is already used. Cause: The provided email is already used by another Economic Operator account.
Email Confirmation	Message: The confirmation is empty. A Cause: A confirmation is mandatory.
Email Confirmation	Message: The confirmation is not the same as the e-mail. Cause: The e-mail and the e-mail confirmation don't match.
Captcha	Message: The response to the captcha challenge is empty. Cause: The captcha challenge must be retype.
Captcha	Message: You have failed the Captcha challenge. Please try again. Cause: The text typed doesn't correspond to the captcha challenge.

4.3. My Calls for Tenders

This functionality displays all Call for Tenders for which the user has subscribed.
This screen is accessible by clicking on the link "My Calls for Tenders" in the left side menu.

By checking "Display open/closed Call for Tenders" and clicking the "Apply" button, you will filter the Call for Tenders list to display only open/closed Call for Tenders.

Fields displayed in the result table:

First Column	A "new" bullet is shown in that column if the Call for Tenders has been created or modified after the user last connection.
Title	Title of the Call for Tenders. This link opens the Call for Tenders details page.
Status	The status of the Call for Tenders. <ul style="list-style-type: none">•Published : Calls for Tenders published in the Public Area;•Closed: Calls for Tenders that have an expired time limit for receipt of tenders or requests to participate;•Cancelled: Calls for Tenders cancelled after publication. Note that the sort of the status column is workflow driven and not alphabetically driven.
Start Date	The publication date of the Call for Tenders. After this date the Call for Tenders is visible on the public part. For Call for Tenders published on TED, this date corresponds to the TED publication date. For other Call for Tenders, this is the date on which the Call for Tenders is available on the public part of eTendering.
Closing Date	Date on which the Call for Tenders is closed.

4.3.1. Subscribe to notifications for new Call for Tenders

This functionality allows an economic operator to subscribe for receiving notifications for new Call for Tenders published. Once subscribed, the user will receive notifications each time a new Call for Tender is published in the system.

The subscribe functionality is accessible via the My Calls for Tenders page (See "My Calls for Tenders").

In order to subscribe to notifications click on the link "Activate Notifications of New Calls for Tenders" in the Action Box (category: Notifications).

After the subscription, a confirmation message is displayed on the page.

In the same manner, the user can unsubscribe to notifications by clicking on the link "Deactivate Notifications of New Calls for Tenders" in the Action Box (category: Notifications).

4.4. Search a Call for Tenders

Search a Call for tenders

This functionality allows the search of one or several Calls for Tenders based on search criteria.

This functionality is the one displayed by default when a user enters in the eTendering application.

The "Search for a Call for Tenders" form is accessible via "Call for Tenders – Search Calls for Tenders" in the Action Menu.

This page allows specification of criteria to be applied in the search process.

All those fields are optional and you don't need to fill all of them.

Text in title or description	Specify the text that can be part of the title or description.
Status	Specify which status of the Call for Tenders should be taken into account. You can choose more than one status by using the CTRL key. <ul style="list-style-type: none"> •All: display all Call for Tenders with no filter on a specific status. •Published: Calls for Tenders published in the Public Area. •Cancelled after publication: Calls for Tenders that have been cancelled. •Closed: Calls for Tenders that have an expired time limit for receipt of tenders or requests to participate.
Start Date	Specify the period to take into account for the start date of a Call for Tenders. <ul style="list-style-type: none"> •From: You can enter the date manually or click on the calendar button to select the date. •To: You can enter the date manually or click on the calendar button to select the date.
Time limit for receipt of tenders or requests to participate	Specify the period to take into account for the time limit for receipt of tenders or requests to participate of a Call for Tenders. <ul style="list-style-type: none"> •From: You can enter the date manually or click on the calendar button to select the date. •To: You can enter the date manually or click on the calendar button to select the date.

Search a Call for tenders Results

To perform the search, click on the "Search" button. The search result is displayed at the bottom of the page.

First Column	A "new" bullet is shown in that column if the Call for Tenders has been created or modified after the user last connection.
Title	Title of the Call for Tenders. This link opens the Call for Tenders details page.
Status	Current status of the Call for Tenders. <ul style="list-style-type: none"> •Published: Calls for Tenders published in the Public Area. •Cancelled after publication: Calls for Tenders that have been cancelled. •Closed: Calls for Tenders that have an expired time limit for receipt of tenders or requests to participate.
Start Date	Publication date of the Call for Tenders.
Time limit for receipt of tenders or requests to participate	Date on which the Call for Tenders is closed.

4.5. Display a Call for Tenders Details

This functionality allows the user to consult the Call for Tenders data, the associated questions and documents.

The details of a Call for Tenders are accessible via the search results or via My Call for Tenders section.

Contracting Authority	Represents the organisation responsible for the issue and management of specific Call for Tenders.
Title	Title of the Call for Tenders.
Description	The description of the Call for Tenders.
Contract Type	The type of contract applicable for the Call for Tenders.
Procedure Type	The type of procedure; e.g.: OPEN_PROCEDURE.
Status	The current status of the Call for Tenders at a given time.
Start Date	The publication date of the Call for Tenders.

TED publication date	This is the publication date of the Call for Tenders on TED Website.
Question Deadline	The date until which an Economic Operator can post a question for a Call for Tenders.
Answer Deadline	The date until a Question can be replied for a Call for Tenders. This is always the same as the time limit for receipt of tenders or requests to participate of the Call for Tenders. This date can be postponed, so that all questions can be answered.
Time limit for receipt of tenders or requests to participate	Date on which the Call for Tenders is closed.
Conditions for opening tenders (date)	The date on which the Contracting Authority opens the received offers. This is for information purpose only.
Lots	List of lots defined for the Call for Tenders.

4.6. Not published Call for Tenders

The Call for Tenders that you trying to access is not available because it has not been published yet

4.7. Subscribe to a Call for Tenders

This functionality allows an economic operator to subscribe to a Call for Tenders. Once subscribed, the user will receive notifications of Call for Tenders events like the publication of new documents.

Moreover, the user will be able to ask questions related to the Call for Tenders.

The subscribe functionality is accessible via the details page of the Call for Tenders (See "Display a Call for Tenders Details").

In order to subscribe to a Call for Tenders click on the link "Subscribe to Call for Tenders" in the Call for Tenders details page or click on the link "Subscribe" in the Action Box (category : Actions). After the subscription, a confirmation message is displayed and a notification is sent to the economic operator (both email and message).

In the same manner, the user can unsubscribe from a Call for Tenders by clicking on the link "Unsubscribe from Call for Tenders" in the Call for Tenders details page or in the Action Box (category: Actions).

The user may not want to receive notifications for a specific Call for Tenders. For disabling notifications, click on the link "Disable Notifications" in the Call for Tenders details page. The link is available as soon as the user is subscribed to the Call for Tenders.

4.8. My Questions & Answers

This functionality displays the questions of all Call for Tenders for which the he has subscribed and the questions he has created. The question that have not been read yet by the Economic Operator are displayed in bold.

There is the possibility to display only the unread questions by clicking on "Only unread questions" and then clicking on the "Apply" button.

This page is accessible by clicking on the link [My Questions & Answers](#) in the Action Menu:

Question	The question description.
Call for Tenders Title	Title of the associated Call for Tenders.
Submission Date	The date when the question was submitted by her creator.
Status	The current state in the question process.

4.9. Create a question

This functionality allows the user to create a question on a Call for Tenders for which he has subscribed.

To create a question click on the link "Create a question" in the Questions & Answers tab or click on the link "Create a question" in the Action Box (category : Actions).

Click on "Save" button to create the question as a draft, click on "Submit" button to create the question and submit it to the Call for Tenders' team. Otherwise, click on "Cancel" button to abort the creation.

The following fields must be completed:

Subject	The question's subject.
Question	The question's description.

The possible errors in this page are the following :

Subject	Message: Please fill in a Subject for the question. A Cause: An subject is mandatory.
Question	Message: Please fill in a description for the question. Cause: A description is mandatory.
Subject	Message: The subject is too long. Cause: It should be less than 240 characters.
Question	Message: The question description is too long. Cause: It should be less than 2000 characters.

4.10. Edit a question

This functionality allows the user to edit a question he had created on a Call for Tenders.

However, a question can only be edited while it is a draft.

To edit a question, first go to the My Questions & Answer.

Click on the question you want to modify.

Then click on the link edit in the Question details tab or in the Action Box (category: Actions).

Click on "Save" button to save the question as a draft, click on "Submit" button to save the question and submit it to the Call for Tenders' team. Otherwise, click on "Cancel" button to abort the modification.

Subject	Original question subject.
Question	Original question description.

4.11. Delete a question

This functionality allows the user to delete a question he had created on a Call for Tenders.

However, a question can only be deleted while it's a draft.

To delete a question, first go to the My Questions & Answer.

Click on the question you want to delete.

Then click on the link "Delete question" in the Question details tab or in the Action Box (category: Actions).

Then a confirmation window is displayed where you can confirm the deletion or abort it.

4.12. Search a question

This functionality allows the user to search for a question by specifying search criteria. The user can only search questions related to Calls for Tenders for which she has subscribed.

In order to search a question, click on the link "Search a Question" in the Action Menu.

The page "Search a question" is displayed with search criteria you can fill.

All the fields are optional: you don't need to fill all of them. You can leave them empty with the purpose of displaying the full list of questions.

To perform the search, click on the "Search" button.

The search results are displayed at the bottom of the page.

Containing Text	Defines the text that should be found in the question's title or description.
In the answer	Defines the text that should be found in the answer.

4.13. Display details of a Question

To see question's details, click on the title of a question.

The Question's Details page is displayed for the selected question.

The Question's Details page is composed of two sections :

- Question's status.
- Question's data

4.14. Display Call for Tenders documents

Click on the Document Library tab in the Call for Tenders Details page.

The complete list of documents is displayed under the tab.

Title	Title of the document is translated in the current language if available otherwise it is displayed in the default language. This link opens the Document Details page. Default language of the document is mentioned next to the title by an icon and other available files are listed below. You can download the document by clicking on the language icon.
Lot	Specify lot number to which the document is associated.
Document Type	Defines a type of document (e.g. Specifications).
Publication Date	Date of publication of the Call for Tenders.

4.15. Display Details of a document

To see details of a document, click on the title of a document.

Then Document Detail page is displayed for the select document.

Title	Title of the document in either the default language or the logged-in user's language.
Description	Description of the document in either the default language or the logged-in user's language.
Category	Specify to which lot the document is linked if defined.
Type	Type of the document.
Creation Date	Creation date of the document in the system.
Languages	List of languages in which the document is available. Click on a language icon to download the document.

4.16. Download a document

If the user is a registered user, when clicking on the language icon, a pop-up window opens and you can choose to open or save the document.

If the user is an unregistered user a captcha must be entered to download the document.

If the captcha is unreadable, click on "New Captcha" button to generate a new one.

Retype the text displayed in the captcha and then click on "Submit" button.

If the captcha succeeds, a pop-up window opens and you can choose to open or save the document.

If the captcha failed, a new captcha is generated and an error message is displayed.

4.17. Search a Document

Search a document

This functionality allows the user to search for a document in all Calls for Tenders by specifying search criteria.

To search a document, click on the link "Search a Document" in the Action Menu.

Then a search page is displayed with the search criteria you can fill in.

Title or description contains	Specify the text that can be part of the title or description.
Document Type	Specify the document type.
Publication Date	Specify the period to take into account for the publication date of the document. <ul style="list-style-type: none"> •From: You can enter the date manually or click on the calendar button to select the date. •To: You can enter the date manually or click on the calendar button to select the date.
Language of the files	Specify in which language the search must be performed. You can select one specific or all available languages.

Search a document results

To perform the search, click on the "Search" button. The search result is displayed at the bottom of the page.

Title	Title of the document. The link opens the Document Detail page. Click on language icons to download the file.
Call for Tenders Title	Title of the document
Publication Date	Publication date of the document.

4.18. Display document of a Question

Question document library

This page gives an overview of all the private documents linked to a question. Depending on the filter criteria (see next section), the display mode can be document or file based.

Lot	The lot of the file (file mode).
Title	The title of the document (both modes).
Language	The language of the file (file mode).
Publication Date	The document publication date.

Question document library filter

The question document library can be filter by clicking on "Show Filter Parameters" and setting one or more filter parameters:

Title or description contains	One or some words that the document title or description have to contain.
Language of the files	The language of the files to filter. If this criterium is filled, the result display mode will be "file" based.

4.19. Global FAQ

The FAQ page displays the most frequently asked general questions to the eTendering support and allows the user to find an answer to all these questions.

Just click on a question to display its answer.

Before asking a question to the eTendering support, please check this section to ensure your question have not been answered yet.

4.20. Contracting Authority FAQ

The FAQ page displays the most frequently asked questions of a particular Contracting Authority to the eTendering support and allows the user to find an answer to all these questions.

Just click on a question to display its answer.

Before asking a question to the eTendering support, please check this section to ensure your question have not been answered yet.

5. My messages

This functionality displays all the messages received by the user.

This screen is accessible by clicking on the link "My Messages" in the Action Menu.

To see the content of a message, click on the subject.

Clicking on the columns header sort the messages.

You can group the message by Sender if you click on the Sender column.

Once this sort activated, click on the collapse button of the desired Topic to see the related messages.

One or more messages can be permanently removed. To do so, select the messages that you want to remove by clicking the checkbox beside them.

Afterward click on the "Delete" button to delete the selection. A confirmation message is displayed to prevent unwanted deletions.

First column	Defines message to be deleted.
Sender	The origin of the message.
Subject	Subject of the message.
Creation date	Date when the message was sent.

6. Read a message

This functionality displays the content of a message

This screen shows the details of message.

To access to the other messages :

- Get back to My Messages page by the menu;
- Use the action buttons in the bottom of the page.

The actions buttons allows to go to :

- The first message;
- The previous message;
- The next message;
- The last message.

Topic	Topic of the message.
Subject	Subject of the message.
Creation date	Date when the message was sent.
Content	The content of the message.