BUYER’S GUIDE

LIFE CYCLE OF A PUBLISHED CONSULTATION

certeurope
AN OODRIVE COMPANY

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1 Dashboard

The dashboard constitutes the buyer’s home page, once logged in. Buyers view the consultations belonging to one of the groups to which they belong. <link>

The consultations are organized according to status: “In preparation"/”Published”/”Awaiting decision”. A counter indicates the number of consultations for each status.

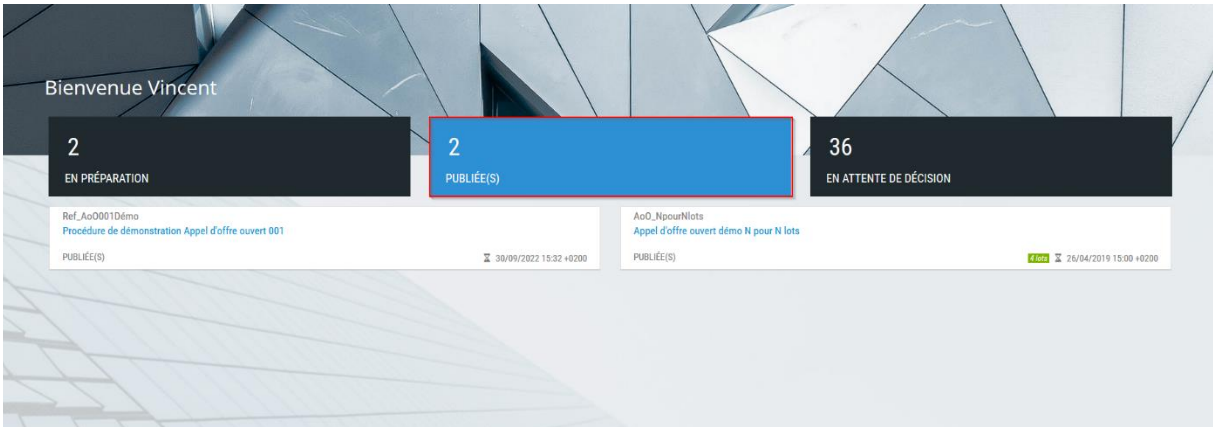
The “Published” consultations are selected by default.

After a consultation is published, its state changes to “Published”. It remains in this state until the deadline for submission of bids. It will pass through the “Preparation” stage at the start of a new phase as the procedure develops.

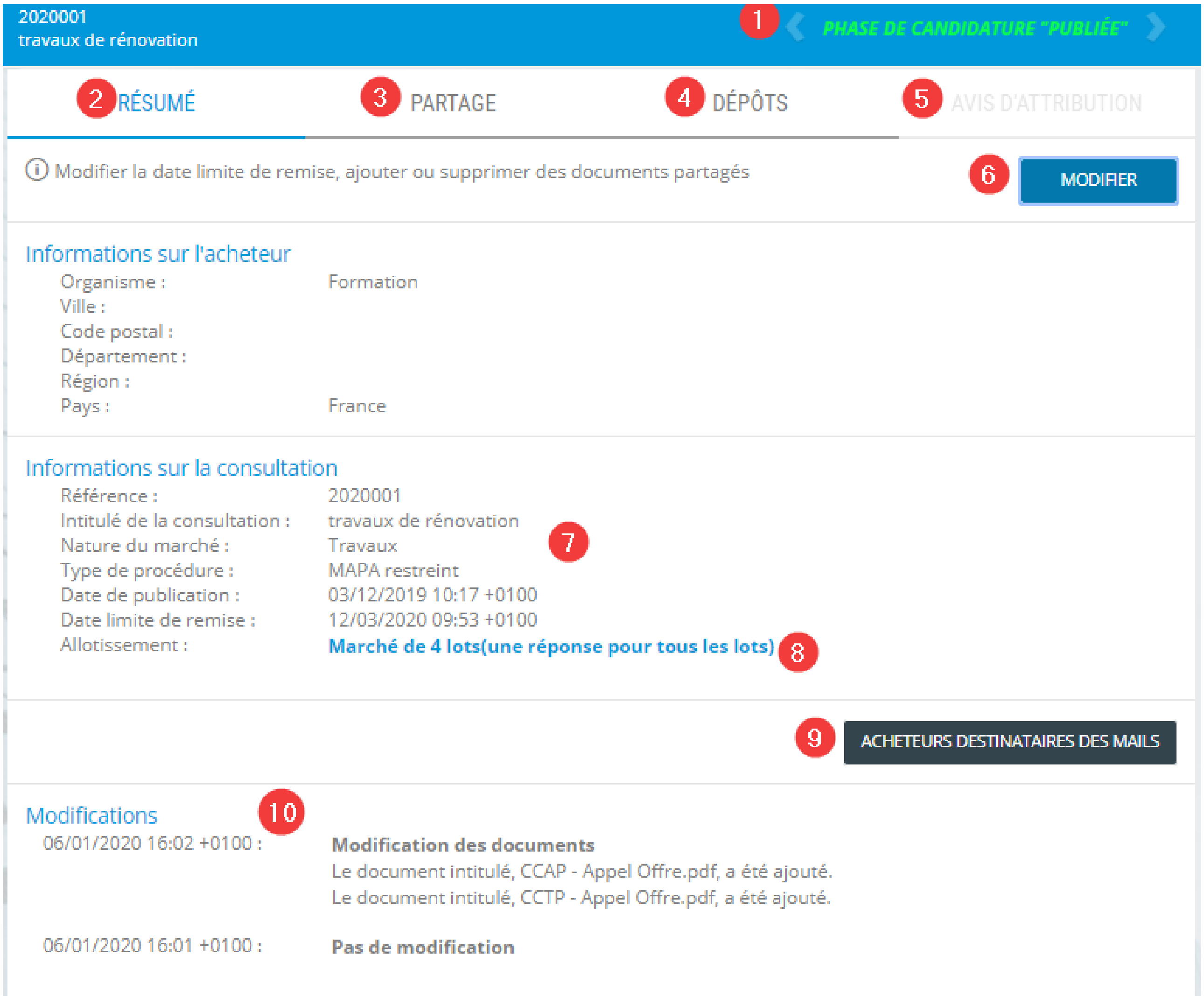
Consultations are sorted by deadline for submission of responses, from the nearest to the most distant. They are presented in the form of tiles: Each tile comprises:

- the procedure reference;
- the procedure subject;
- the group/organization that launched the consultation;
- the deadline for submission of bids;
- information indicating the status.

Clicking on a tile provides access to the consultation details



2 Consultation details



The following elements are displayed on the details page:

1. On the banner, the procedure subject and reference, as well as the procedure phase and consultation status
2. The SUMMARY tab is open by default.

   The SUMMARY tab displays the information about the buyer and the consultation.

It is enhanced gradually with a summary of changes to the consultation and the list of companies included in the phase in progress.

3. The SHARE tab allows access to the consultation folder, removals log and question tracking.
4. The SUBMISSIONS tab allows access to
   - the submissions log
   - decisions
   - additional requests, letters & notifications
5. The AWARD DECISION tab allows you to publish the award decision when the decisions on the procedure have been made.

2.1 Summary tab

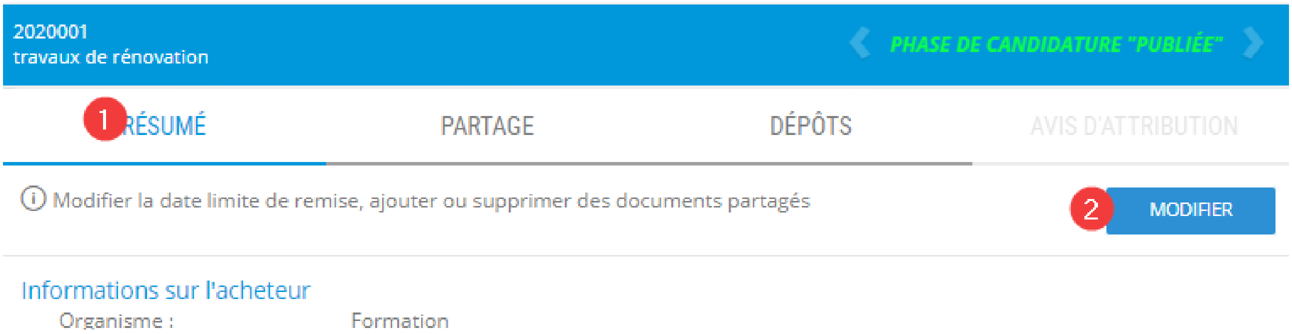
6. EDIT: allows you to make a correction to a procedure:
   - Change to the date for the submissions deadline
   - Change to the tender documents
7. Information on the procedure:
   - Procedure reference and title
   - Type of procedure
   - Submission deadline
   - Procedure publication date
8. Details of lots, if there are any
9. BUYER RECEIVING EMAILS: Configuration of users who receive the notification emails (submission of a bid, question asked, removal from tender documents, etc.)
10. List of changes

3 EDITING A PROCEDURE

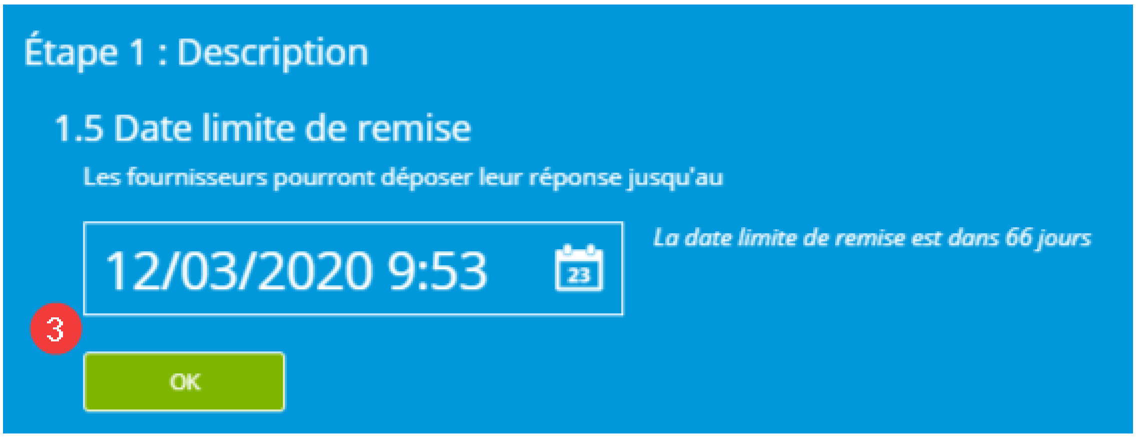
To edit a procedure, do as follows:

1- Click the **SUMMARY** tab

2- Click the **EDIT** button



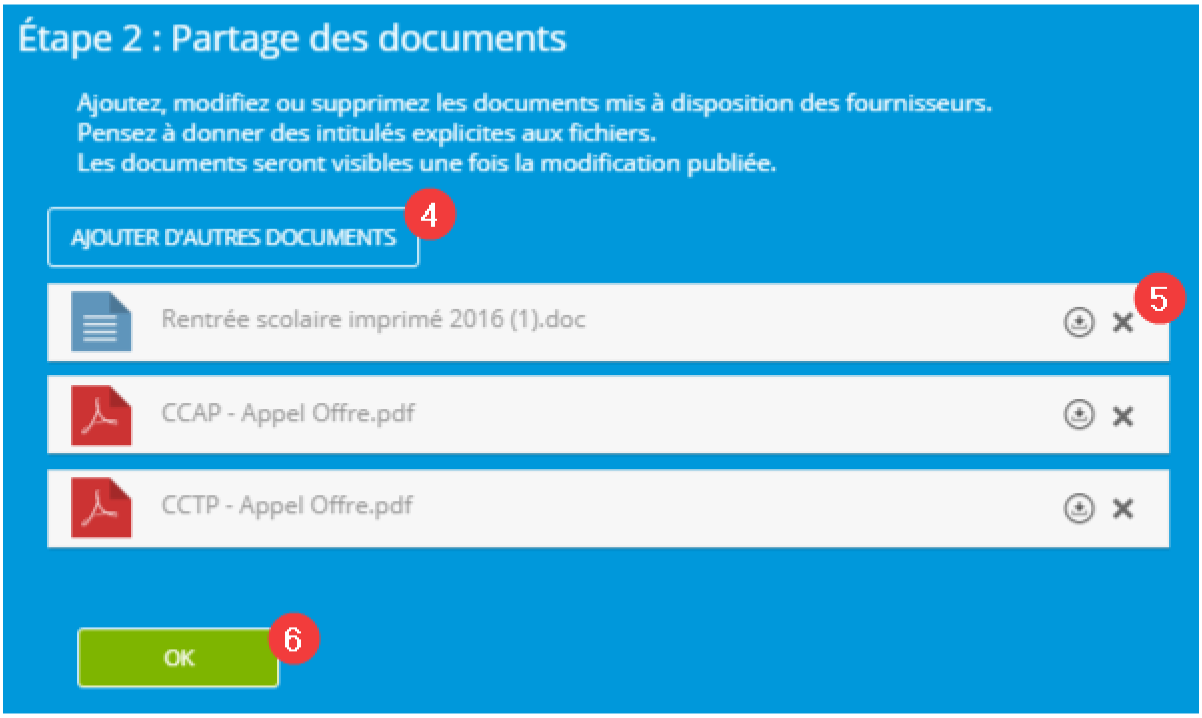
3- In the window that opens, change the publication date if necessary, and click **OK**



4- Add documents to the tender documents by clicking **ADD DOCUMENTS**

5- Delete a document from the tender documents by clicking on the cross to the right of the document

6- When all changes have been made to the tender documents, click OK

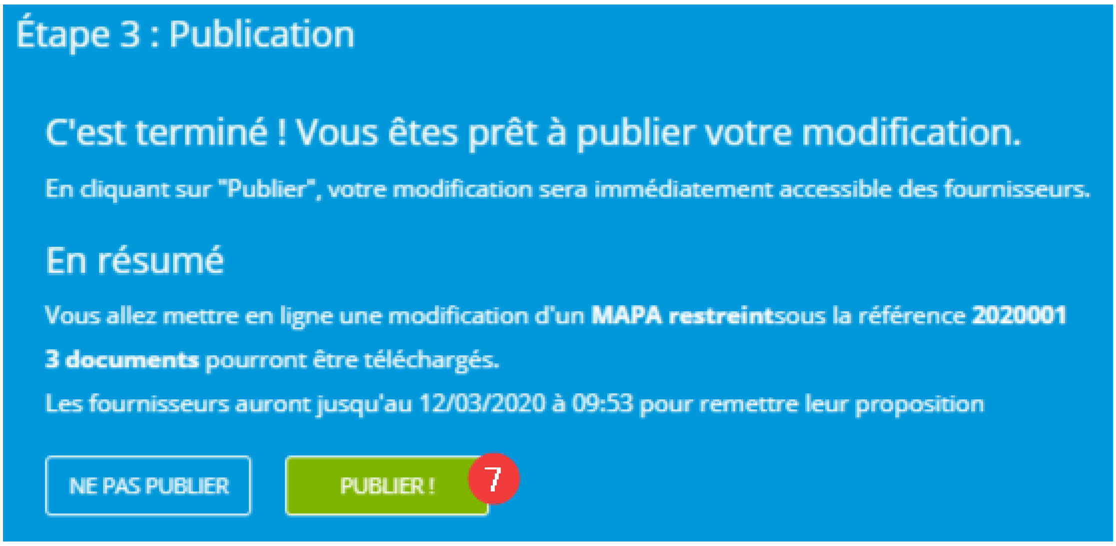


<u>Note</u>:

When you add a document with a name that already exists in the tender documents, the second document will be renamed with the suffix -1.

To edit an existing document, you must delete it from the tender documents and then add it again. These two actions can be done in the same change.

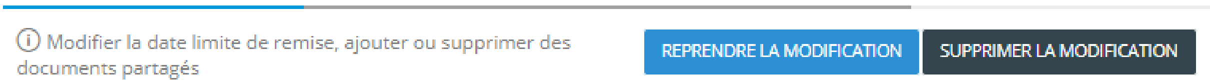
7- Click **PUBLISH** to publish the change to the procedure



Note:

If the change is not published, it is possible to change it again and to publish it by clicking **RESUME THE CHANGE**

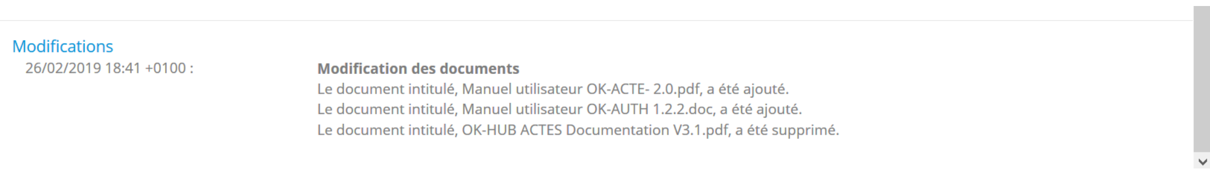
A change in progress can be deleted if it is no longer appropriate



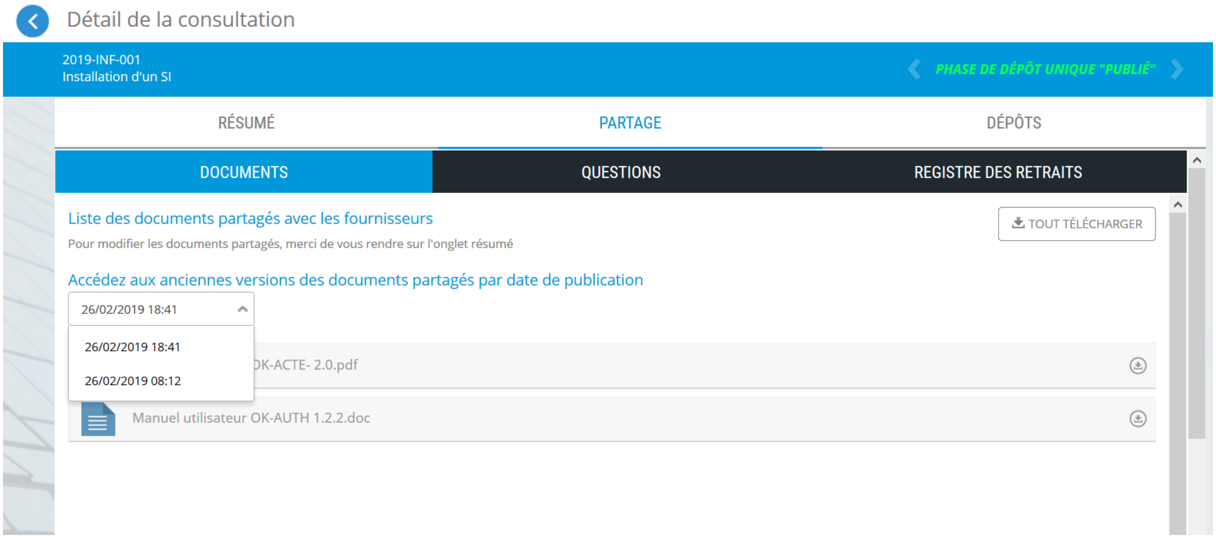
You cannot start another change until the change has been deleted or published.

4 CHANGE MONITORING

The changes made to the folder are displayed on the “SUMMARY” tab of the consultation details.



On the “SHARE” tab of the consultation, the version history of publications can be viewed by change publication date.


Détail de la consultation
2019-INF-001
Installation d'un SI
PHASE DE DÉPÔT UNIQUE "PUBLIÉ"
RÉSUMÉ
PARTAGE
DÉPÔTS
DOCUMENTS
QUESTIONS
REGISTRE DES RETRAITS
Liste des documents partagés avec les fournisseurs
Pour modifier les documents partagés, merci de vous rendre sur l'onglet résumé
TOUT TÉLÉCHARGER
Accédez aux anciennes versions des documents partagés par date de publication
26/02/2019 18:41
26/02/2019 18:41
26/02/2019 08:12
OK-ACTE- 2.0.pdf
Manuel utilisateur OK-AUTH 1.2.2.doc

5 RESPONDING TO QUESTIONS FROM SUPPLIERS

5.1 Introduction

Suppliers can ask questions using the platform, as long as they are identified. For each question asked, an email is received showing the name of the procedure to which the question relates.

5.2 Access questions

To access the questions:

1- Click the ***Share*** tab

2- Click the ***Questions*** subtab

The questions are found in part ***3***

You can then:

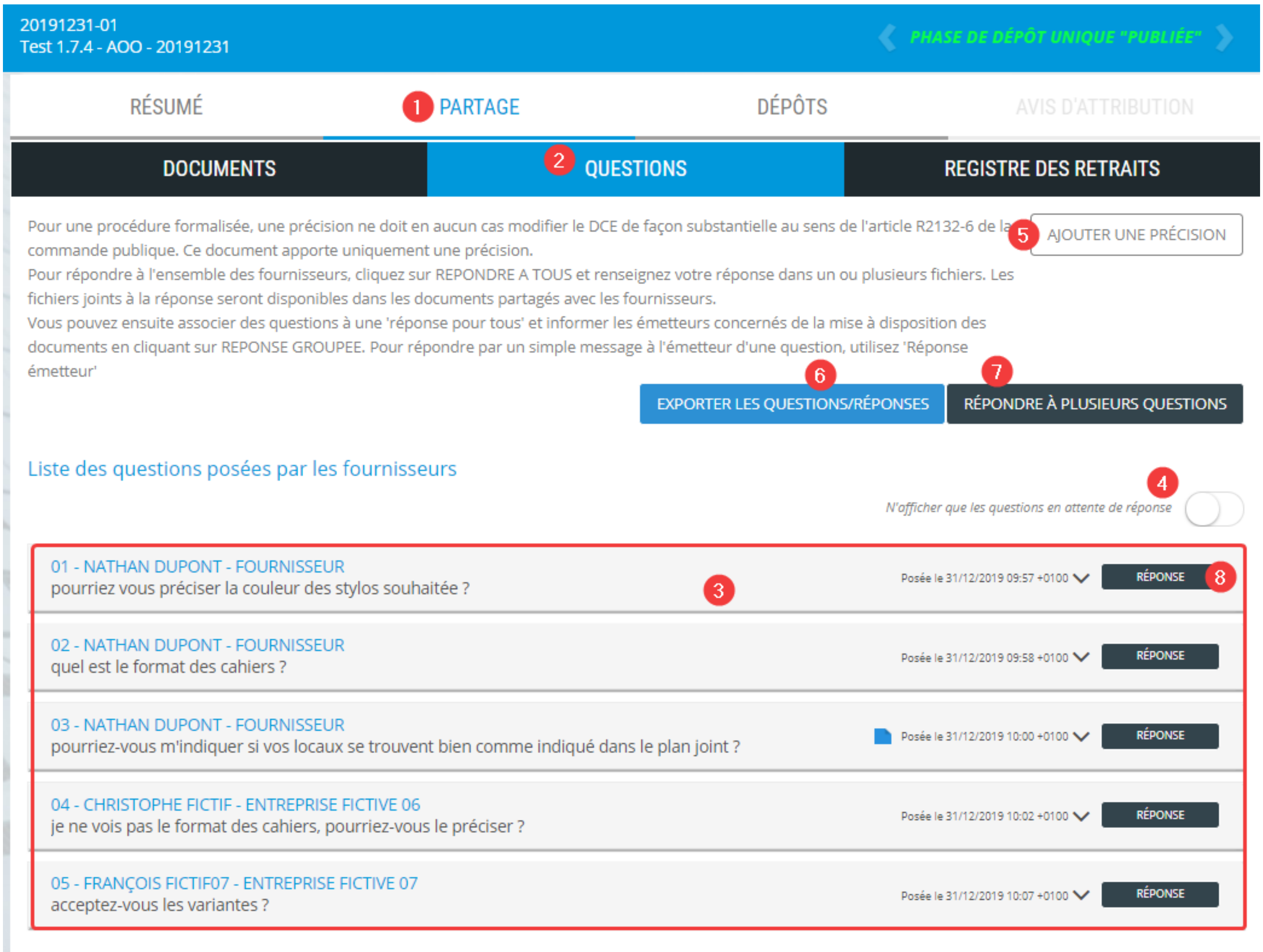
4- Filter the questions that have not been answered

5- Add a clarification

6- Export the questions and responses

7- Answer several questions in a single response

8- Answer a single question



5.3 Public or private response

The response can be public or be addressed to the sender only.

5.3.1 Public response

A public response can be viewed by all suppliers, whether they are logged in or not. If the buyer links a file to this response, it can also be viewed by all suppliers.

The question can also be viewed by all suppliers.

However, suppliers will not be able to see the following information

- File linked to the question: if you would like all suppliers to be able to access this, you must submit it with the response
- Identity of supplier who asked the question: suppliers will not be able to see the company name or contact name

- Date and time of the question

In the questions/answers window, the public responses are identified using the ***Public*** note on a green background *Publique*

5.3.2 Non-public response

It may be necessary not to make the question and response public (spelling mistake in the question, off-topic question, etc.). In this case, only the sender can view the response and any linked file.

In the questions/responses window, the non-public responses are identified using the ***Sender only*** note on an orange background *Emetteur seul*

5.4 Filter questions that have not been answered

The *Only display questions awaiting a response* cursor allows you to filter the questions to which the buyer has yet to respond.

5.5 Add a clarification

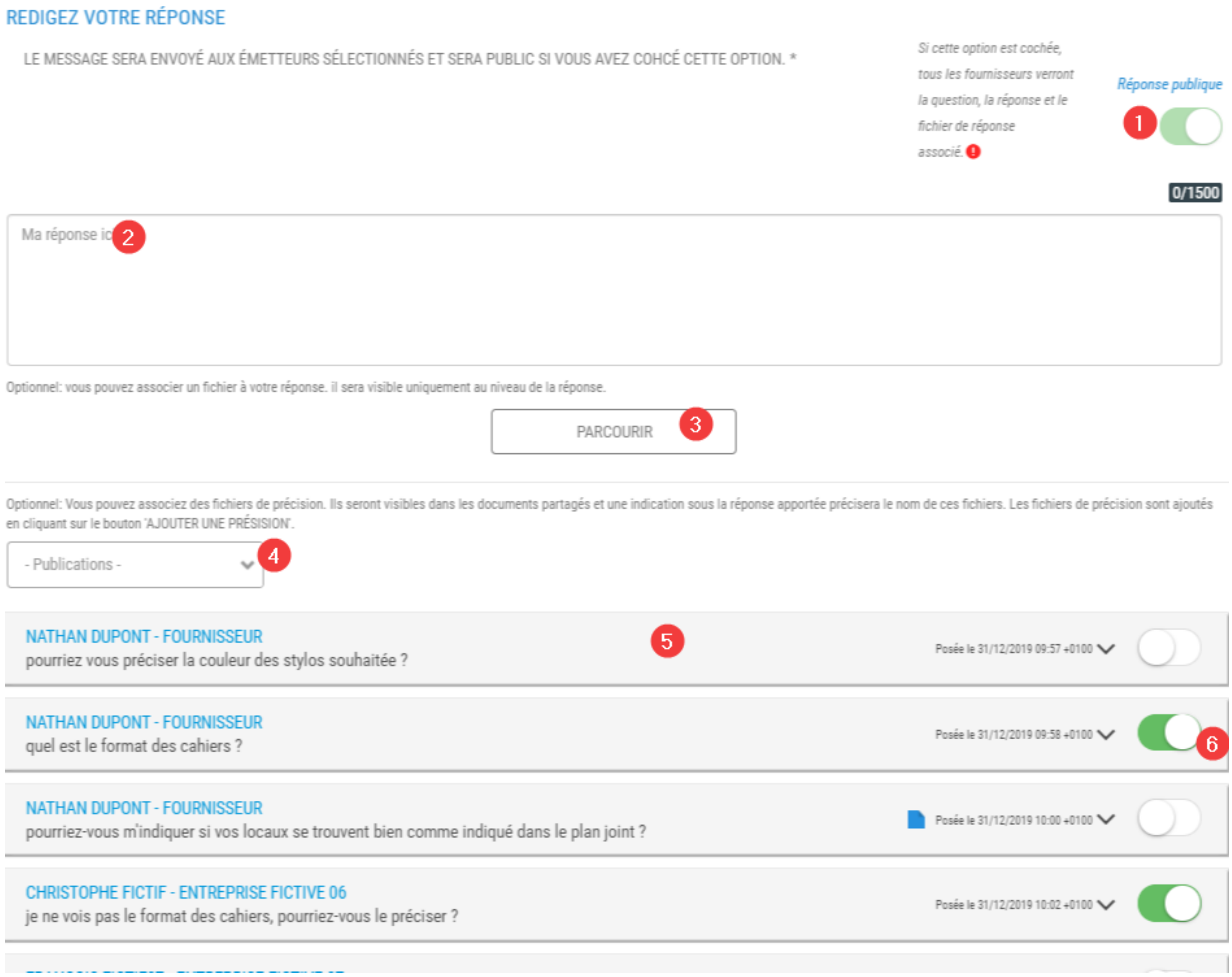
You can add a file, which will be viewed with the shared documents, but without this being a substantial change to the tender documents. The document will be shown to suppliers as a document that provides a clarification.

After the addition of the clarification file, all suppliers who have downloaded the tender documents, asked a question or submitted a bid will receive an email notifying them that a clarification has been added to the shared documents.

For example, questions/responses can be compiled in a single document and added as a clarification element.

If this document amends the tender documents and the consultation, it is important to go via editing the tender documents and possibly changing the response deadline.

5.6 Respond to several questions

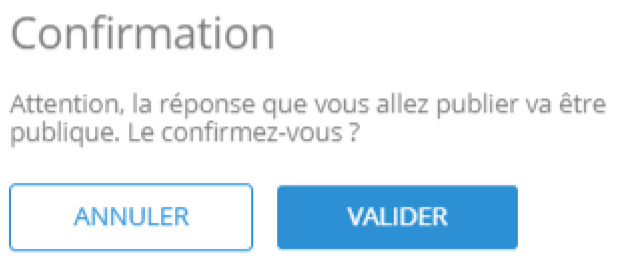


You can respond to several questions at the same time. To do this, you must click ***Respond to several questions*** in the questions/responses window.

1- By default, the response is public (cf. paragraph 5.3.1). To make it private, i.e. visible to senders only, you must uncheck ***Public response***
2- Write the response contents
3- Click ***Browse*** to add a file to the response. If the response is public, the file can also be viewed by all suppliers.
4- To link a clarification file that has already been published, select the publication date and time for this clarification file.
5- Display of questions to which no response has been provided with the identification of the supplier who sent the question.

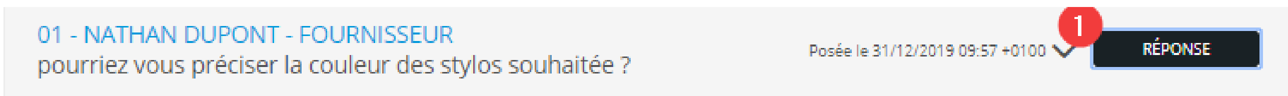
6- Selection of questions to which the response is related.

Before publishing the response, a confirmation message is displayed. This message reminds you whether the response is public or private.



5.7 Answer a single question

1- Click the ***Response*** button to the right of the question.



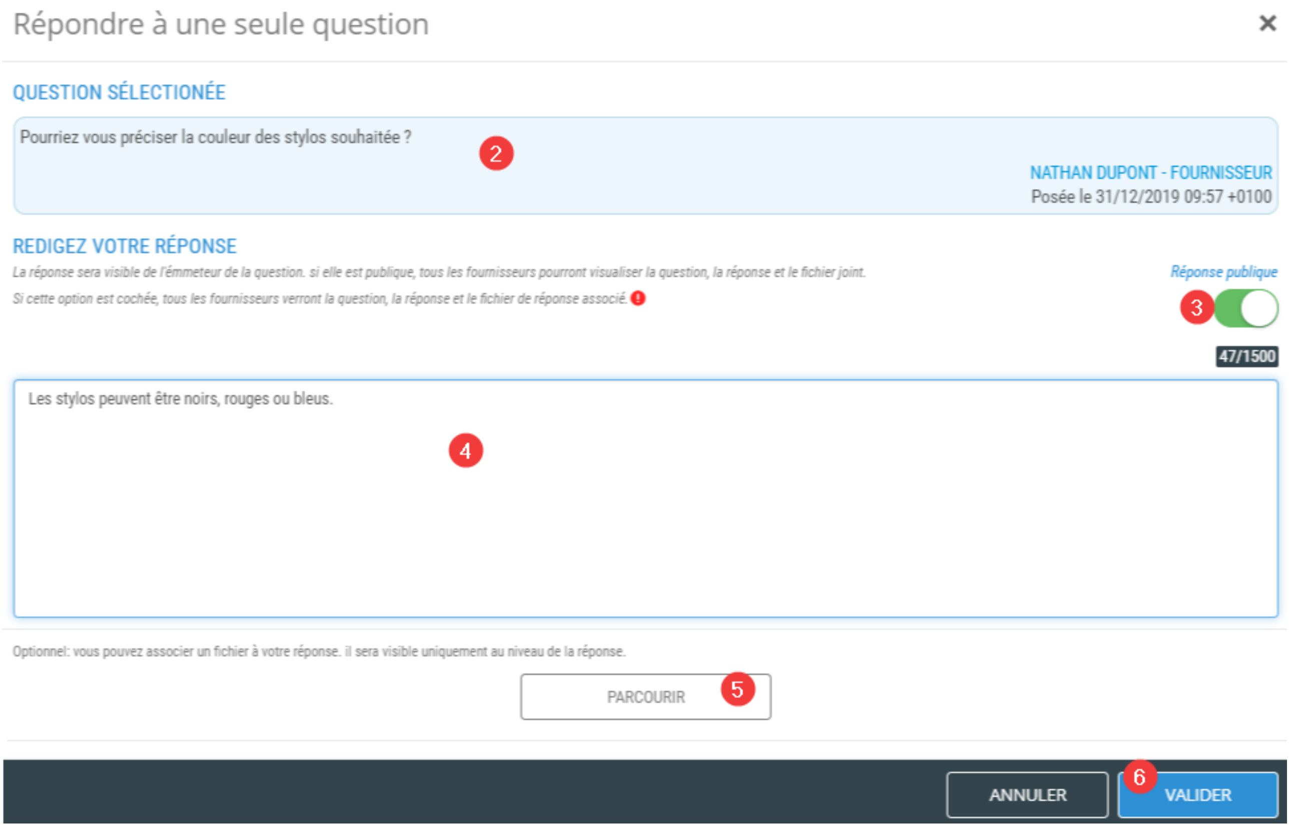
2- A reminder is given of the question's content, the supplier who asked the question and the date and time it was asked.

3- By default, the response is public (cf. paragraph 5.3.1). To make it private, i.e. visible to senders only, you must uncheck ***Public response***

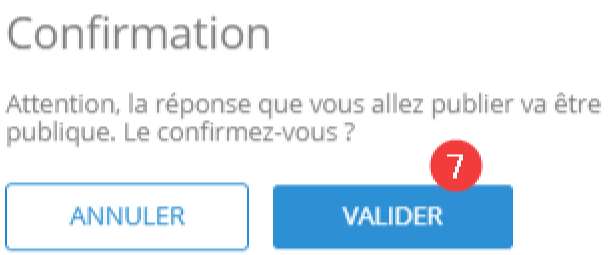
4- Write the response contents

5- Click ***Browse*** to add a file to the response. If the response is public, the file can also be viewed by all suppliers.

6- Confirm the response



7- Before publishing the response, a confirmation message is displayed. This message reminds you whether the response is public or private.



5.8 Export the questions and responses

You can export the questions and responses provided in an Excel file.

In addition to the questions and responses provided, this file contains the name of the supplier and of the contact who asked the question, as well as the date of the question and that of the response.

6 Removals log

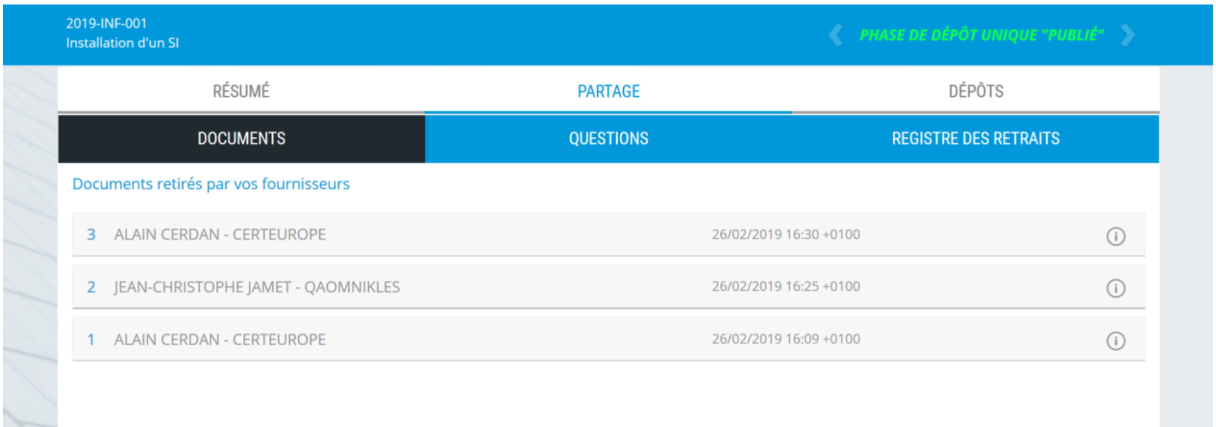
The removals log is in the “SHARE” tab of the consultation details.

This displays a list of suppliers who have removed a dossier while logged in to their account. Anonymous removals are therefore not tracked in the log.

Removals are displayed in decreasing chronological order. The order in which they appear in the log is numbered in increasing chronological order.

The following details are displayed:

- The order in the log
- The name of the supplier and company
- The date and time of the first removal
- The information icon on the supplier's record.



7 Submissions log

The submissions log is in the “SUBMISSIONS” tab of the consultation details.

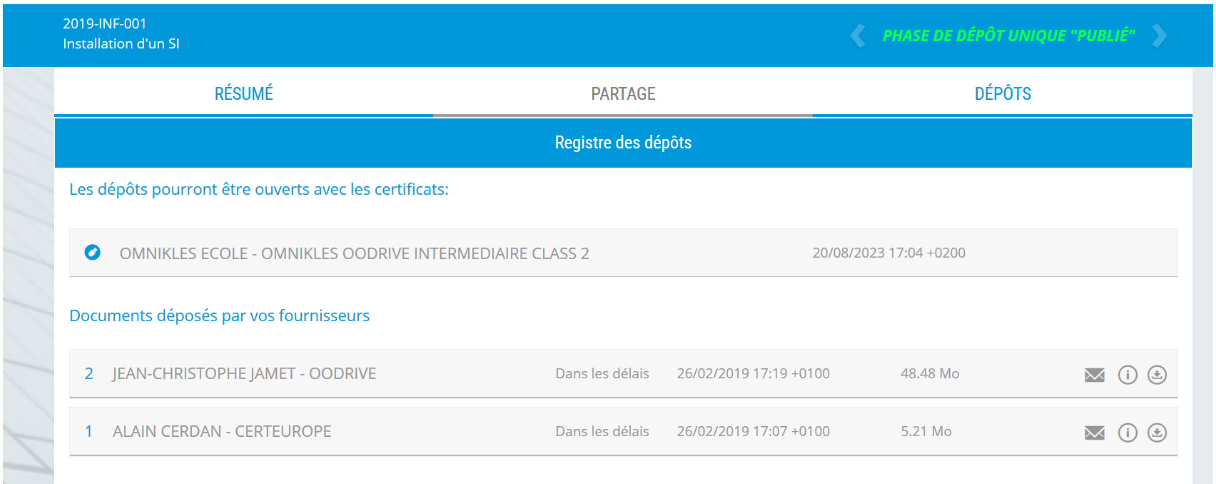
The list of certificates allowing bids to be opened is displayed. These certificates are configured by an administrator and linked to user groups.

The list of suppliers who have submitted a dossier while logged in to their account is displayed.

The submissions are displayed in decreasing chronological order. The order in which they appear in the log is numbered in increasing chronological order.

The following details are displayed:

- The order in the log
- The name of the supplier and company
- Date and time of the last submission
- Size of the submission
- The information icon on the supplier's record.

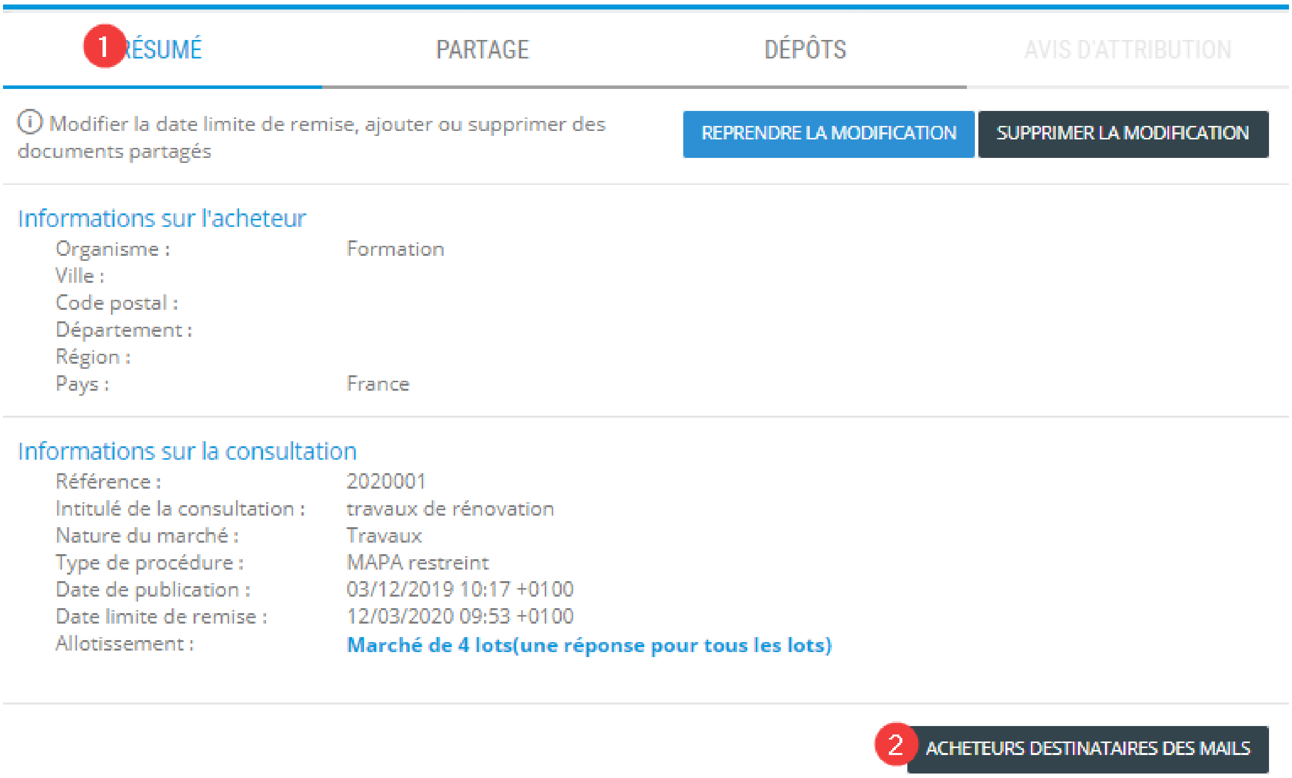


8 SENDING NOTIFICATIONS TO OTHER BUYERS

In a procedure, it is possible that other buyers are notified of the actions of this procedure: bids received, changes published, questions added, etc.

1- Click the **SUMMARY** tab

2- Click **BUYER RECEIVING EMAILS**

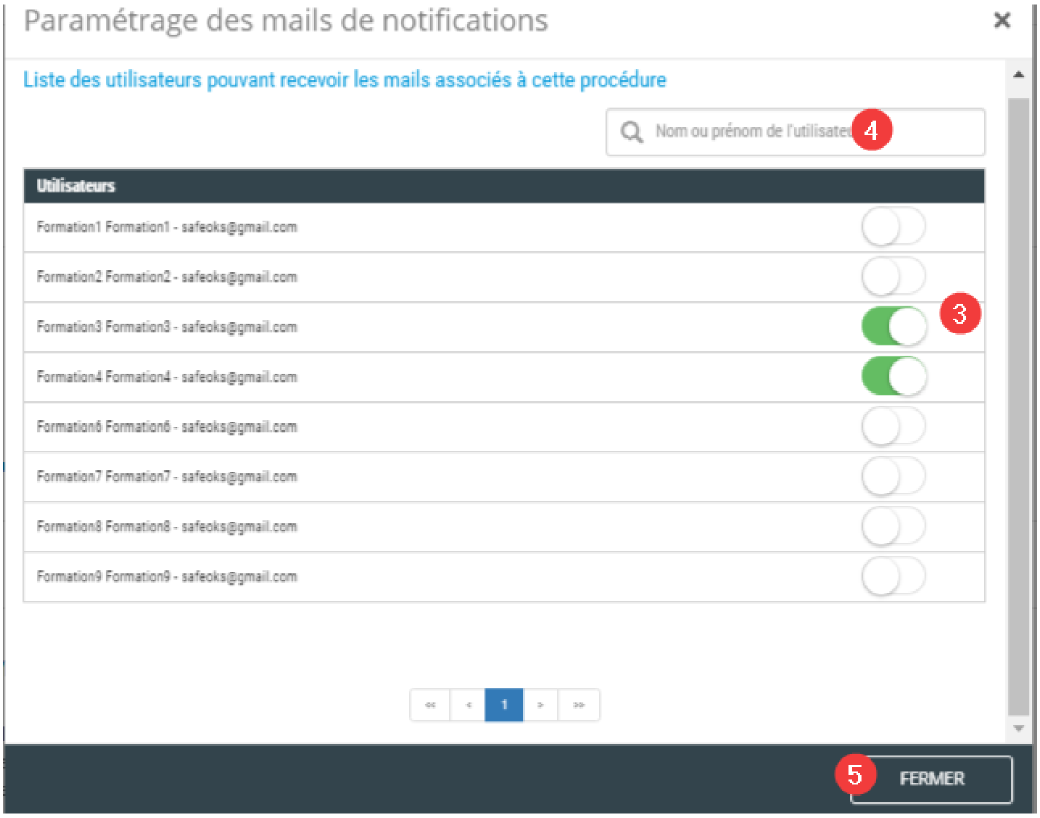


3- Select the users who will be able to receive the notifications for this procedure.

Only the users who are part of the procedure group will be displayed.

4- You can filter users by last name, first name and email address

5- When you have finished your selection, click **CLOSE**



9 NOTIFICATIONS CENTER

The notification center is available to buyers on the dashboard page once they are logged in. It displays the number of events on your consultations.

An event corresponds to an action by the buyer or by a supplier that involves an exchange of documents. With each event there is a notification to the buyer and emails sent to the buyers and suppliers concerned.

The types of events for buyers are:

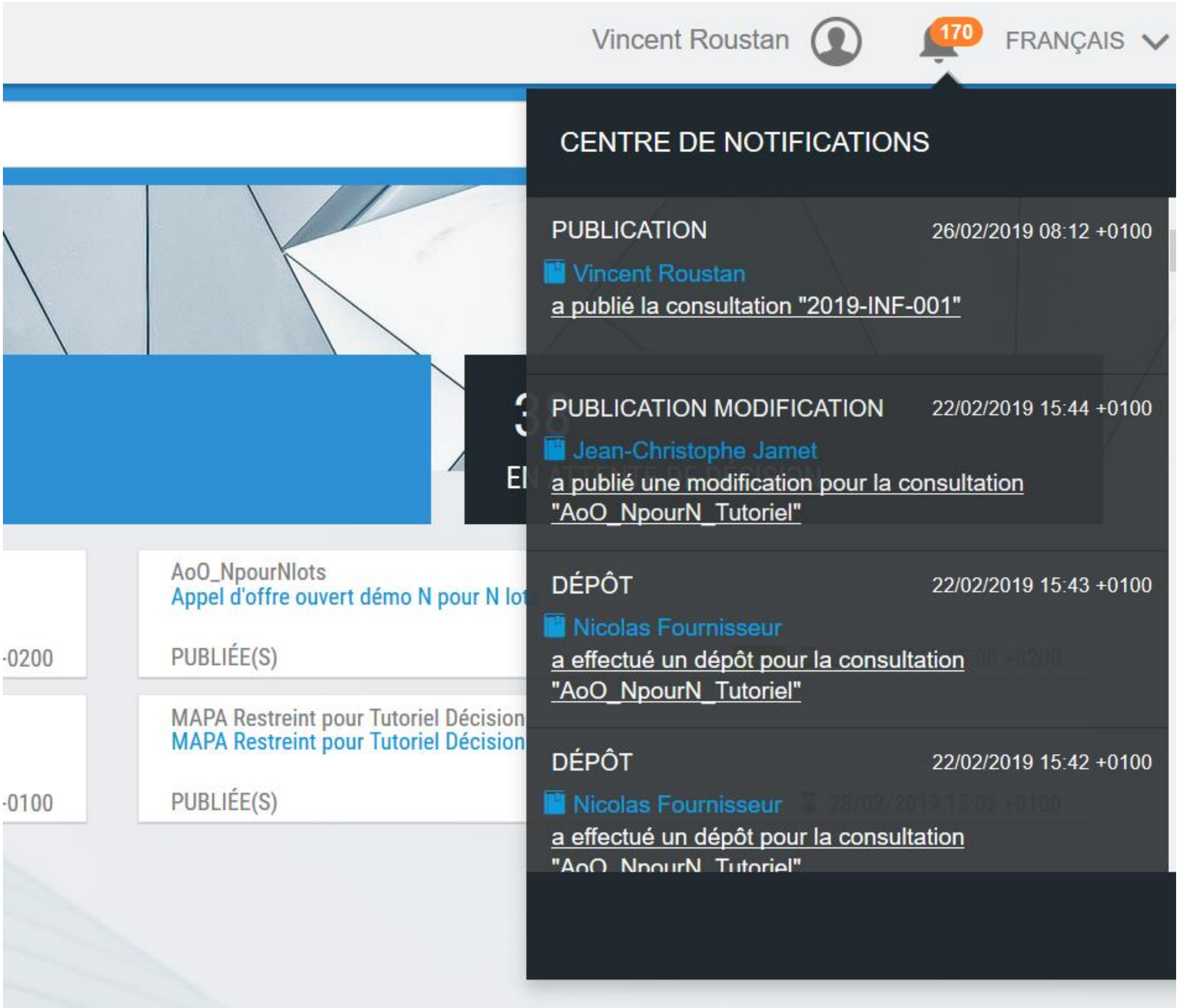
- The publication of a consultation
- The publication of a change to the dossier or deadline
- The publication of a corrective notice
- The publication of an additional request
- An invitation for a restricted consultation
- The reading of a question
- The publication of a response to a question
- The publication of an award decision
- The reading of a response to a request.
- The publication of a letter

The types of events for suppliers are:

- Removal of a dossier or a document
- Submission of a bid
- Submission of a question
- Submission of a response to a request
- Reading of a dossier change

- Reading of an additional request
- Reading of a response to a question

The notifications center offers quick access to the events on the consultations in progress.



For each event, the following are displayed:

- The type of event
- The time stamp for the event
- The name of the author of the action

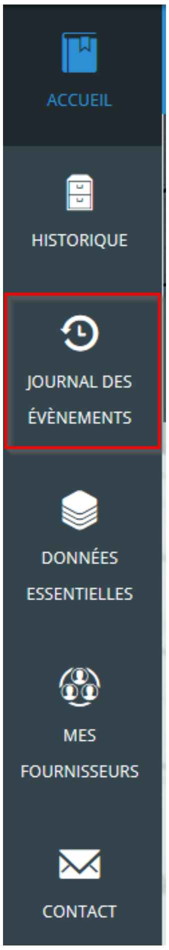
- A description of the action with the reference of the consultation and a direct link to the consultation

The advanced management of events is described in the <EVENT LOG> section

10 EVENT LOG

10.1 Access to the log

The event log is available from the menu on the left once you are logged in.



10.2 Events

An event corresponds to an action by the buyer or by a supplier that involves an exchange of documents. With each event there is a notification to the buyer and emails sent to the buyers and suppliers concerned.

The event log allows you to track and search for all information exchanges between buyers and suppliers.

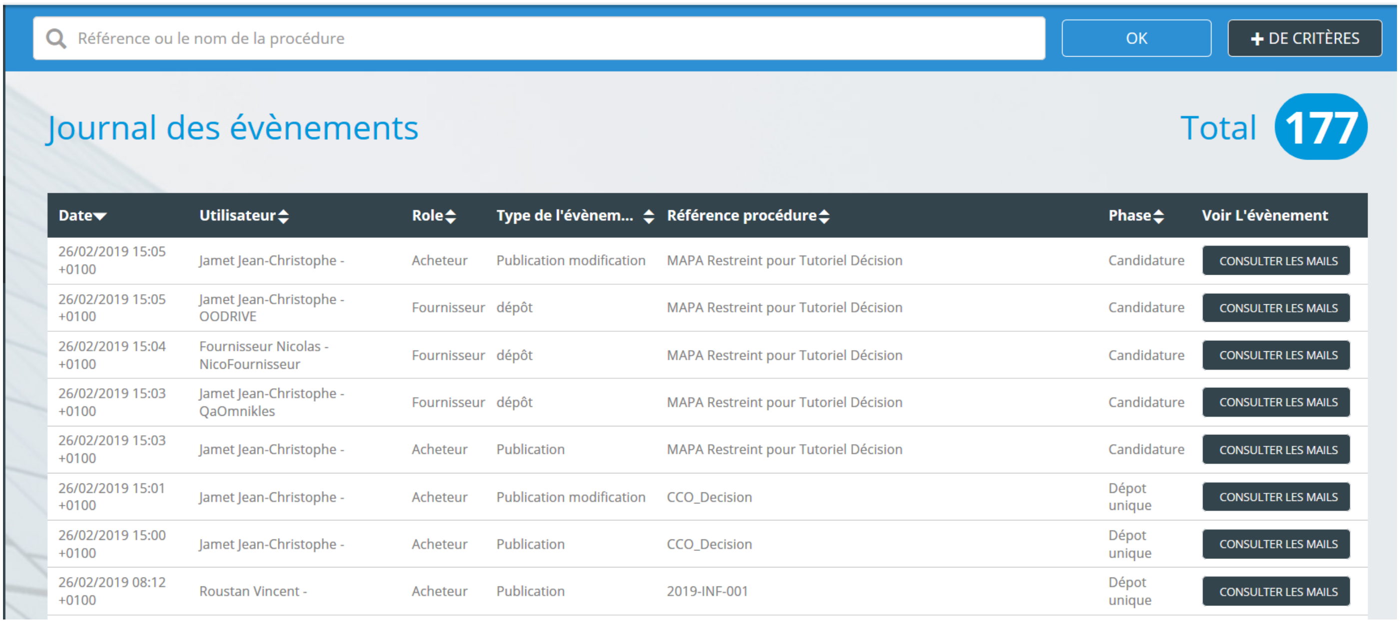
The event types are described in the <NOTIFICATIONS CENTER> section

10.3 Log description

By clicking on "event log", the event log displays the events for all of the buyer's consultations, sorted into decreasing chronological order.

Each line displays an event:

- The date of the event
- The author's name with the company's name for suppliers
- The user's role: buyer or supplier
- The type of event
- The consultation reference
- The procedure phase
- Access to emails exchanged

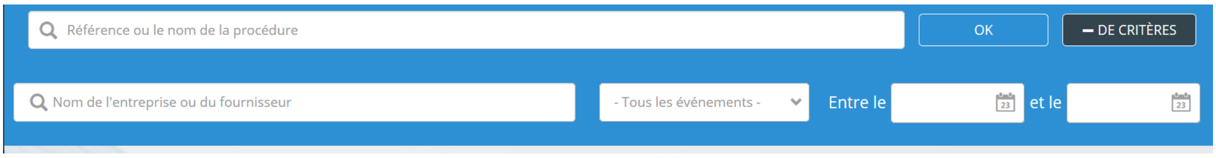


10.4 Search in the log

A quick search allows you to filter the display with part of the consultation name or reference.

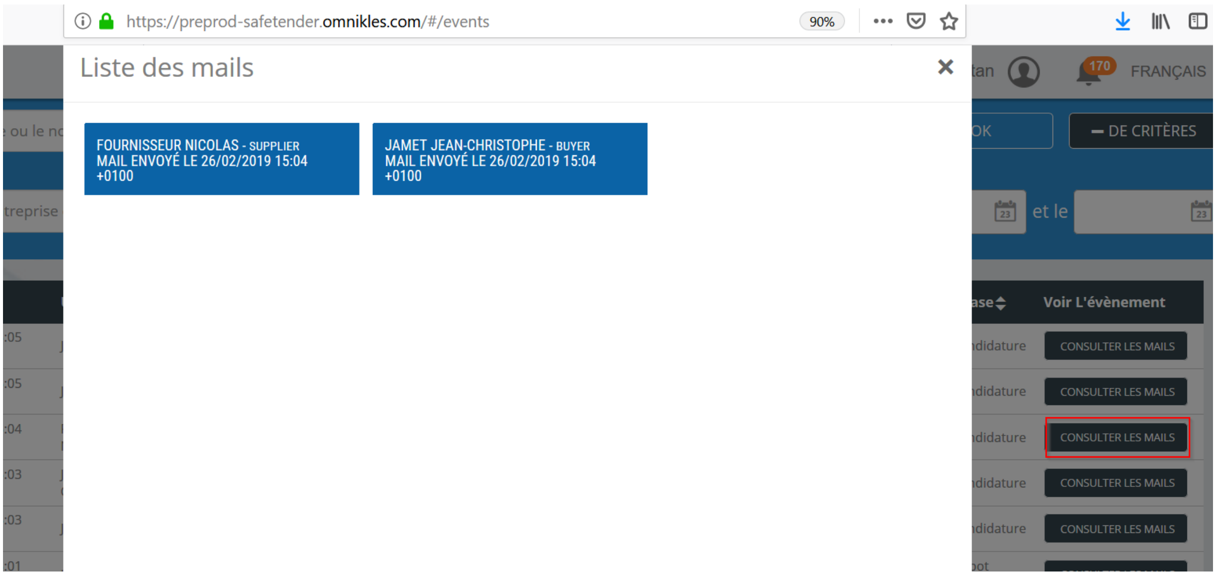
When you click ***+CRITERIA***, an advanced search form allows you to enter additional criteria:

- The name of the author or company (for suppliers)
- The type of event
- A date interval

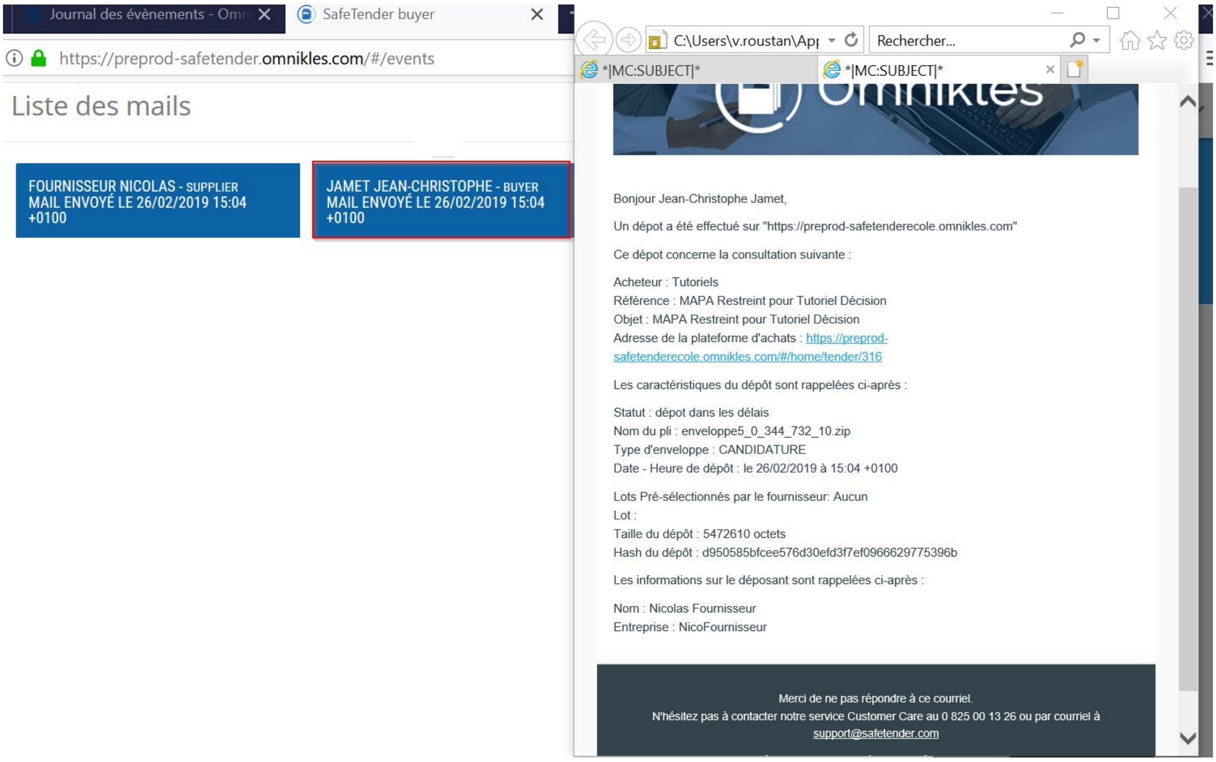


10.5 Access to emails

When you click ***See emails*** on an event, the list of emails sent for this event is displayed with the recipient's name, the recipient type (buyer or supplier) and the date on which the email is sent.



Clicking on a tile allows you to display the email's content.


Journal des évènements - Omr
SafeTender buyer
https://preprod-safetender.omnikles.com/#/events
Liste des mails
FOURNISSEUR NICOLAS - SUPPLIER
MAIL ENVOYÉ LE 26/02/2019 15:04 +0100
JAMET JEAN-CHRISTOPHE - BUYER
MAIL ENVOYÉ LE 26/02/2019 15:04 +0100
C:\Users\v.roustan\App
Rechercher...
|MC:SUBJECT|
|MC:SUBJECT|
Bonjour Jean-Christophe Jamet,
Un dépot a été effectué sur "https://preprod-safetenderecole.omnikles.com"
Ce dépot concerne la consultation suivante :
Acheteur : Tutoriels
Référence : MAPA Restreint pour Tutoriel Décision
Objet : MAPA Restreint pour Tutoriel Décision
Adresse de la plateforme d'achats : https://preprod-safetenderecole.omnikles.com/#/home/tender/316
Les caractéristiques du dépôt sont rappelées ci-après :
Statut : dépot dans les délais
Nom du pli : enveloppe5_0_344_732_10.zip
Type d'enveloppe : CANDIDATURE
Date - Heure de dépôt : le 26/02/2019 à 15:04 +0100
Lots Pré-sélectionnés par le fournisseur: Aucun
Lot :
Taille du dépôt : 5472610 octets
Hash du dépôt : d950585bfcee576d30efd3f7ef0966629775396b
Les informations sur le déposant sont rappelées ci-après :
Nom : Nicolas Fournisseur
Entreprise : NicoFournisseur
Merci de ne pas répondre à ce courriel.
N'hésitez pas à contacter notre service Customer Care au 0 825 00 13 26 ou par courriel à support@safetender.com

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Société Anonyme au capital de 300 190 Euros - RCS Paris 432 735 082 - N.A.F. 5829C