E-PROCUREMENT

Purchasing platform

USER GUIDE

(Providers)

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TABLE OF CONTENTS

Search opportunities ................................................................. 3
Access to Tenders where you already showed your interest ................................................................. 7
Submission of your proposal ......................................................... 9
Finalize a tender still in edition ..................................................... 15
Replacement of the original offer with a new one ... 17
The variants ..................................................................................... 19
Communication with the Council of Europe (questions / answers) ................................................................ 20
Supplier selection ............................................................................ 23
Contracting and accessing your Contract ................................. 24
Manage your account and add members ................................. 31
General notes and contacts ............................................................. 34
Search opportunities

You are already registered in the Council of Europe e-procurement platform, you can now access the VORTAL tool by entering your **USERNAME** login and your **PASSWORD** (top right of the homepage).

**IMPORTANT**

IT IS MANDATORY TO FIRST LOGIN TO THE PLATFORM BEFORE EXECUTING ANY OF THE FOLLOWING STEPS

(e.g.: links in the automatic e-mails’ alerts)

This action takes you to your personal homepage.

You have 2 solutions to search the calls for Tender of the Council of Europe:

a) Please enter a keyword in French or English (e.g.: cde, sécurité, travaux, consultant, ...) in the second search field « Search Procedures » - **SEARCH**...
... in order to obtain the list of procedures of the Council of Europe, you can enter the letters **CDE** – then click on **VIEW ALL** to see all the opportunities.

To access the procedure, click **DETAIL** on the right of the screen

<table>
<thead>
<tr>
<th>Type of Consult/Procedure</th>
<th>Current Phase</th>
<th>Publish Date</th>
<th>Replies Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restricted Consultation Procedure</td>
<td>Proposals Phase</td>
<td>5 days ago (19/2/2019 3:02:22 PM (UTC+01:00)) Brussels, Copenhagen, Madrid, Paris (Summer Daylight);</td>
<td>5 days ago (10/3/2019 3:10:00 PM (UTC+01:00)) Brussels, Copenhagen, Madrid, Paris (Summer Daylight);</td>
</tr>
</tbody>
</table>

b) You have received an invitation to participate for a call for Tender by e-mail (**OPPORTUNITY**): click **HERE** to directly access the procedure (**attention: you must be logged in to the platform in advance**)
To access to all the necessary information (deadlines, technical details, eligibility and award criteria, subsequent amendments...), clic on **CONFIRM INTEREST**. All documents of the current procedure appears.

Without confirming your interest, you cannot access to all doucuments and details and will not be informed of any modification of the procedure.
ATTENTION : If you don’t want to finalize your proposal at once and would like to return to it later, you have 3 possibilities for searching it on the platform:

a) Click on INTERESTED CONTRACT NOTICE in the CONTRACT NOTICES page (see next Chapter)
b) Keep the e-mail OPPORTUNITY with a link to access directly the procedure.
c) Or, on the home page, in the SEARCH field, indicate the name of the call for Tender

IMPORTANT: in order to receive the automatic alerts from the platform, you need to register beforehand your email in the tool. If it is not done, please follow the steps:

1- Click on the icon on the right corner, then on COMPANY SETTINGS

2- Click EDIT PROFILE

3- At the center of the page, edit and update NOTIFICATIONS EMAIL ADDRESS
Access to Tenders where you already showed your interest

The following description works only for Tenders that you already identified as interesting for you, meaning button **CONFIRM INTEREST** was already clicked in the past (see previous Chapter) AND the Tender is still under publication.

1. Login and click on **VIEW ALL** in Vortal’s Homepage.

2. You have a complete overview of all Tenders opened in your home country (ex: French Tenders for French suppliers). They are ranked in a chronological order. Click on **INTERESTED CONTRACT NOTICES** to access the Tenders where you already showed interest.

3. Click on **DETAIL** at the end of every offer’s line.
   Once into the offer, click on **GO TO OPPORTUNITY DOSSIER WORK AREA** to make or finalize your offer, send messages, see clarifications...
Submission of your proposal

A window with **CREATE REPLY** will be displayed. Click on the button to reply to the Tender.

Your offer will consist of 3 steps (left column – **GENERAL INFORMATION**, **QUESTIONNAIRE**, **DOCUMENTS**).

1/ **General information** (give a name to your offer – please make sure you don’t use 2 times the same name as the system won’t accept similar name for 2 different procedures)

**IMPORTANT**: the button **UPDATE** means «save». It allows you to register your offer and to return to it later.
2/ Fill-in the questionnaire: click to the «+/−» to extend or hide the details of the questionnaire. Afterwards, use the pop-up menu to navigate from the ECONOMIC REQUIREMENTS (price, eligibility criteria,) to the TECHNICAL REQUIREMENTS (references, technical specifications ...) and fulfill the necessary fields.

Regarding prices, fill-in the 2 cells for each price question:

- INTERNAL REFERENCE: your own internal reference (if any)
- PRICE PER UNIT: your unit price for this line

If you wish to propose an alternative item for 1 or more line:

- Click on CREATE ALTERNATIVE ITEM at the end of the corresponding line
- Fill-in the new line

ATTENTION : if the Council should only take your alternative into consideration, do not fill any price inside the original line : only your alternative will then be considered.

If you are willing to add one or more lines to our Call for Tenders :

- Click on ADD EXTRA ITEM
- Fill-in the new line
ATTENTION: your additional line will be visible on Council’s side. However, the Organization will later decide if that line should be considered or not during the evaluation.

3/ Documents appendix if needed (please add all documents requested by the Council – if necessary, you can always refer to the procedure with the button BACK TO DOSSIER WORK AREA)

To load documents click ADD DOCUMENTS

Then click SELECT FILE, choose the file in your computer, click UPLOAD then CLOSE. The file is uploaded.

Repeat the same procedure for each document to be attached to the platform (e.g.: technical documents, invoices, signed contracts, ...)

![Image of the platform interface with selected documents](image-url)
2 additional steps might appear in the procedure in some cases:

- If the call for tenders is modified (for example: deadline for reply has been postponed), a STEP 1 – AMENDMENTS is added (the word AMENDMENT also appears in red in the DOSSIER WORK AREA).

Please click on APPLY AMENDMENTS in order to submit your offer once it’s finalized. More information about the modification can be found in DETAILS.

- If the call for tenders includes Lots, a STEP 2 – LOTS appears. Check the boxes for the Lots you are willing to answer.
Finally send your proposal with the button **FINISH PROPOSAL** (bottom right of the screen) or save it to continue working on it later (button **UPDATE**).

You will often have the opportunity to sign electronically some information or documents you add inside the tool. If you want to do so (not mandatory), click on **SIGN**.

If you would like to modify your offer before sending it to us, click **EDIT**. If not: click **SUBMIT** (bottom right of the page).
Last step: click **SUBMIT PROPOSAL** after checking the box with the terms and conditions: your offer will be sent to us and finalized.

Please note that several successive messages (green banners) will appear at the top of the screen when changes to your proposal take place.

Please note also that you have the possibility to make sure that your offer was sent to us by checking its status in the **OPPORTUNITY WORK AREA** – status should be **SUBMITTED**.

**IMPORTANT:** until the deadline of the offer submission you can always change your offer inside the platform and eventually replace the original one.
Finalize a tender still in edition

To comeback to a tender already started (edition status):

- Once connected, enter the procedure’s name in the Search engine ...

- Click on **DETAIL** to enter in the procedure ...

- Click on **GO TO OPPORTUNITY DOSSIER WORK AREA** as you have already notified your interest ...
- Click on your offer to continue the edition ....
Replacement of the original offer with a new one

If you made a mistake in your offer you can replace it until the closing date for proposal submission. In your DOSSIER WORK AREA, where the first offer is saved, click CREATE

![Image of the interface showing how to replace an offer](image)

Then please follow the same steps for the submission of the proposal (as in the previous chapters).

After entering your new offer, click SUBMIT

![Image of the interface showing the submission process](image)

Please choose in the drop list the offer that you would like to submit and check the box:

- WITHDRAW for the offer to be deleted
- SUBMIT PROPOSAL for the final offer
In your **OPPORTUNITY WORK AREA** your 2 offers appear.
The variants

If needed, the tool allows you to submit your own variant, different from the requested one.

Attention: even if the variants are authorized, you are obliged to always also answer to the original request.

On the first page of offer submission click **TYPE OF PROPOSAL** and choose **VARIANT**

Complete the rest of the procedure as indicated in the **SUBMISSION OF YOUR PROPOSAL** chapter, modify your offer in the price **QUESTIONNAIRE**.

Once your variant offer is ready, click on **SUBMIT** and choose if you want to keep both offers or not:

- Keep both offers = **DO NOTHING** for 1st offer, **SUBMIT** for the Variant
- Keep only the Variant = **WITHDRAW** for the 1st offer, **SUBMIT** for the Variant

If you have kept both offers, they will both appear in your Work area with **SUBMITTED** status:
Communication with the Council of Europe (questions / answers)

You have 2 possibilities to contact the Council of Europe via the platform:

- **MESSAGES**
- **CLARIFICATIONS**

These tools are available inside each procedure folders (**OPPORTUNITY WORK AREA**). They are connected to the Procedure you are asking for. Please make sure you write messages from the right procedure.

Each communication tool has its own purpose.
1. Messages

For all types of questions and comments.

No time restriction for using this tool.

The Council of Europe answers directly to the question in similar messages and you receive the notification thanks to automatic alert email (click **HERE**).

But information regarding the details/contents of the call for Tender and especially during the period of publication should be requested via **CLARIFICATIONS**, please see below instructions.

2. Clarifications

Only during the Questions/Answers phase of the call for Tender.

As stated in our regulations, the answers to your questions will be distributed to all suppliers interested in the relevant call for Tender. There will be no personalized answer for this type of question. The tool becomes unavailable starting deadline for the Questions/Answers phase.

You receive the notification of a common answer with automatic alert email (click **HERE**).
Supplier selection

On the basis of offers received and according to award criteria, the Council of Europe chooses one or more candidates (depends on the contract type - e.g.: multi-award contract).

The decision will be transferred (by e-mail alert AWARD with a link) inside the platform, in your procedure’s folder (OPPORTUNITY WORK AREA).

IMPORTANT: This folder will be very useful during the procedure and the contract execution as it contains all Tenders’ details, goods / services, receipts and invoices linked to the contract

Click the Final Report link to see the details of the decision (file to download – shows the selected / rejected bid).
Contracting and accessing your Contract

If your company wins the Tender, you will receive an e-mail alert.

It contains the contract proposal including the details of your offer. These elements are, as usual, in the folder of the procedure (OPPORTUNITY WORK AREA).

Without any alert, you can always find your Contract from your Home Page by clicking on “Awards / Contracts”:

This link will bring you directly to the complete list of the contract you were awarded. The status of each contract is written in the column STATUS. Some of these steps needs your actions.
Once you found your Contract, click on **DETAILS** at the end of every contract’s line.

You can also find your Contract when entering your Procedure keywords in the **SEARCH** field of the Home page.

When you find your procedure, click **DETAIL** and then **GO TO OPPORTUNITY WORK AREA**

Click the link of the contract (e.g. here: PT1SI.CNTR.16001) and check the information (6 steps). On the 1st step you will find the Purchase Order number (PO) that you need to indicate in all your invoices.

**ATTENTION : DO NOT CLICK ACCEPT CONTRACT or REJECT CONTRACT.**

**THESE BUTTONS should ONLY BE USED AT THE END OF THE PROCEDURE.**
To move to another step, just click on the corresponding blue link.

The 2\textsuperscript{nd} and the 3\textsuperscript{rd} steps contain administrative information and your price offer.

In the 4\textsuperscript{th} step you will find a contract to sign. Please read attentively the following instructions.

\textbf{a) If you have an electronic signature:}
\begin{itemize}
  \item[i.] Click \textbf{FILE NAME}
  \item[ii.] Check the information and close the file
  \item[iii.] Click \textbf{SIGN} to search your electronic signature certificate and validate the contract
\end{itemize}

\textbf{b) If you do not have an electronic signature:}
\begin{itemize}
  \item[i.] Click \textbf{FILE NAME}
  \item[ii.] Check the information and print the file
  \item[iii.] Sign the file
  \item[iv.] Save it on your computer, print / sign / scan it to your computer
  \item[v.] \textbf{Give a proper file name to your signed Contract} (example: Company name + project name + “signed contract”)
  \item[vi.] Upload the signed contract with \textbf{ADD DOCUMENT} (see the chapter \textbf{SUBMISSION OF YOUR PROPOSAL – 3. Documents annexes} for file upload on the platform)
Only after signing the contract (manually or electronically) you may click **ACCEPT CONTRACT**.

If you do not want to validate this contract proposal you can **REJECT CONTRACT**. In such a case, we may contact you for more details.
Contract execution and invoicing

When the contract is fully approved by the Council of Europe (status = CONTRACT ACCEPTED), contract obligations can be carried out.

Go to OPPORTUNITY WORK AREA

Inside the contract module, please click on the 5th step (CONTRACT EXECUTION).

2 possibilities:

a) A delivery plan is in place and shows the quantities contracted (awarded / planned / received / missing). The quantities change according to received items. You can go to the next step: invoicing.
b) If no delivery plan is implemented for this contract: you can directly **CREATE** your invoices.

New window **INVOICE REGISTRATION** appears to register the invoice. Please fulfill all mandatory fields.

Attention: indicate the same price without VAT in both fields **TOTAL VALUE WITHOUT VAT** and **TOTAL VALUE WITH VAT**.
You can **UPLOAD** your invoice (see the chapter **SUBMISSION OF YOUR PROPOSAL – 3. Documents annexes** for file upload on the platform).

**NOTE**: please make sure you give a proper file name to your invoices (example: Company name + project name + PO + invoice number)

When it is loaded, click **CONFIRM**. Finally, **SEND** us your invoice.

**ATTENTION**: the **CREATE** button is only visible when the contract is approved by the Council of Europe. You cannot upload your invoice without having this button active.

The Council of Europe will accept your invoice, or not (ex: necessity to modify a mistake). When the invoice has the status **ACCEPTED**, it is ready for payment.
Manage your account and add members

a) When a new Provider’s account is created, the first person connected to that account is registered as the Administrator;
b) This is why you must consider having a generic e-mail when creating the Supplier’s account (Notifications Email Address) in order for your colleagues or assistants to be also informed (ex: info@provider.com) – all Vortal Alerts will go to that e-mail.

Indeed, the alerts are sent to the e-mail registered when the Provider’s account was created. That email can be later modified by clicking on the picture (top right) and then on Company Settings (this is where you can fill-in and update your Company data – same can be done for your User data)

In the new screen, click on Edit and modify the Notifications Email Address (and any other information if needed)

Once the Supplier’s account has been created, you can:

a) Modify / complete information of the Company by clicking on the picture, then Company Settings (where you can fill-in data regarding the Company like: address, bank details, …) and finally Edit.
b) At the same place, you can change the Administrator if you click on the drop list. Make sure you have more than one member before doing so (see below on how to add members):

![Company Responsible Information](image)

<table>
<thead>
<tr>
<th>Company Responsible - Name</th>
<th>Supplier 5</th>
<th>Supplier 5a</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Responsible - Job Title</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Company Responsible - Email</td>
<td><a href="mailto:testvortal+201@gmail.com">testvortal+201@gmail.com</a></td>
<td></td>
</tr>
<tr>
<td>Company Responsible - Phone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Company Responsible - Fax</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

c) **To add new members to the Company:**
   - Send the link to a colleague you want to add;

d) **https://community.vortal.biz/prodsts/Users/Login/Index?SkinName=conseileurope**
   - I want to join;
   - Fill-in the spread sheet and, in the field **Company Name**, enter the **exact** name of the Company you want to be a member;
   - Confirm and approve the received email and follow the instructions for Login / password;
   - In the new screen, you can request membership

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**VALIDATE IF MY COMPANY ALREADY EXISTS?**

<table>
<thead>
<tr>
<th>My Office Country</th>
<th>ALBANIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name</td>
<td>supplier 5</td>
</tr>
<tr>
<td>Company ID</td>
<td></td>
</tr>
<tr>
<td>Duns</td>
<td></td>
</tr>
</tbody>
</table>

- Check

**WE FOUND IN OUR SYSTEM THE COMPANIES BELOW:**

![Request Membership](image)
In order to approve the membership request, the Administrator goes to his homepage and clicks on new message.

Later, the Administrator will be able to manage the Company members (accept / reject / active / inactive): **Company Settings** then **Members Management**.

**IMPORTANT:** Please also remember that you can always change the language of the tool with the drop list at the bottom of the screen.
Access link to the E-Procurement tool of the Council of Europe:

https://community.vortal.biz/prodsts/Users/Login/Index?SkinName=conseilleurope

General notes and contacts

a) The Council of Europe deploys this tool for all its purchases in 2018 and 2019. You might not be asked to participate to tenders at first, if your field of activity is not concerned;
b) The tool is optimized for Windows 7 and Windows 10 (all browsers);
c) If you want to use your certified electronic signature, please use IE 11 only;
d) The access to the tool is free of charge. As the solution is CLOUD based, you don’t need to install any program. All the data is stored at our supplier VORTAL (confidentiality and data protection contracts are signed);
e) The tool, which is free of charge, will allow you to:
   o Create your account (please choose a contact email that can be shared and accessible to other colleagues involved with the tool and who might need to also see the alerts sent by the platform);
   o Consult and answer to our calls for Tender published through the tool (as well as other customers also using VORTAL);
   o Follow the current contract execution and, among other things, upload your invoices online;
   o Sign electronically the documents (contracts, invoices, …) if your company has a certified electronic certificate (for more information click here);
f) The e-procurement platform includes integrated communication tools:
   o An alert system which informs you, by email, of different events during Tender procedures (invitation to submit your proposal, addendum, contract signature, …) – these alerts contain direct links to the corresponding procedures and are the best way for you to modify and follow-up your files;
   o An integrated messaging tool to clarify questions, with the Council of Europe, regarding open procedures;
g) Other options, subject to extra charge, are directly available on VORTAL website (links from your supplier area) but these options are not necessary to respond to our calls for Tender.

In order to accompany you, please do not hesitate to contact:

The Procurement Department (DGA) at the Council of Europe for all questions concerning the registration in the tool and open procedures (marie.rapp@coe.int +33 3 90 21 64 51 or bernadette.caillet@coe.int +33 3 88 41 24 60)
VORTAL in case of technical problems (info.coe@vortal.biz or +33 9 70 01 95 53 – French or English speakers)