

PNB Electronic Procurement System

(Version: 2.7)

Manual for Supplier Personnel

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1. Introduction & Mode of Operation

This guide is intended for the Supplier personnel who wish to participate in the electronic procurement process. . All activities related to bidding would be carried out online. The Supplier personnel can post queries online, which will be answered by the buyer personnel. Tender notices that are put up online can be viewed bid for by Suppliers. All tender related activities follow a schedule and all processes on the buyer and Supplier side will follow start and expiry dates as mentioned in the schedule.

2. Web Site

All online activities related to electronic procurement can be carried out on the web site. Please add the URL (<http://www.pnb.org.in>) to your favourites list in MS-Internet Explorer. It is assumed that Supplier personnel know how to use a PC and can access the electronic website on the Internet. The first page that you will see is the 'Electronic Procurement Business Page'. The Business Page provides easy navigational aid to users and guide suppliers through a path that ensures that makes a new user finds the system easy to use.

3. Required Activities before Supplier Registration / Login

- a. Check the configuration of the computer you will be using for the electronic tendering. Basic and mandatory requirement are the following:
 - Operating system should be Windows 98 (SE) or higher.
 - The IE (Internet Explorer) version should be 6.0 or higher and Cipher Strength 128

- b. Please make the entry of the specified URL site into the Trusted Sites. The steps are:
 - Open a new Internet Explorer browser.
 - Click on tools menu.
 - Select Internet Options
 - Click on 'Security' tab
 - Under security tab click the Trusted Sites icon and click on 'Sites' button
 - Type the specified URL in the empty box and click on 'Add' button.
 - Make sure that the box showing the message "require server verification (https:) for all sites in this zone" is unchecked before you click on add button.

- c. Click the button – New Suppliers Click here' on the business page and accept the 'Terms and Conditions' and click the Proceed Button. On the page that provides

the manuals and the client-side component installable download and install the following:

- Number to word conversion utility
- Windows installer services depending upon your machine's configuration (98/2000/XP), [Required if you are using MS-Office older than 2000 version]
- Encryption utility depending upon your machine's configuration (98/2000/XP). Note "Error in Hashing Password" is an indication that the utility has not been installed in the system.

After all the above procedure is completed, a sign with message 'Trusted Sites' will appear on the bottom right hand side corner of the browser which indicates that process mentioned above is successfully completed. If you do not get the sign of 'Trusted Sites' then please repeat point '3c' mentioned above.

Completion of the above steps shall enable you to proceed with Registration or Login action.

4. Supplier Login

The Supplier personnel have to log into the system before any transactions can be carried out.. However, in conformance with the CVC guidelines the site enables any visitor to access tender notifications. Click the 'Login' link on the 'Homepage' and login using your username and password. After successfully logging into the system the 'Action Page' is displayed. Use the option 'Existing Users Click here to Login' if you are a registered supplier on the electronic procurement site. Use the option to register on the site by clicking the button – 'New Suppliers Click Here' o the Business Page.

5. Supplier Registration

To register, click the option 'New Suppliers Click Here'. The system will guide you through a series of screens designed to help you access reference material and download important client-side utilities that are mandatory to use the electronic procurement system. .

The first page you will encounter is a 'Terms and Conditions' page. You will have to select the option 'I Accept' before you can proceed. Please read the terms and conditions mentioned before accepting.

On accepting the terms and conditions you will be provided with the necessary instructions and utilities to configure the client computer for electronic procurement. Please read the manual thoroughly before performing any installations / configurations. Click the button 'Proceed' at the bottom of the page to proceed with a new Supplier Registration.

The Supplier Registration Process

- a. To start the process select a User ID, Name of the Applicant (User's Full Name) & Password and enter your Company Name. When you click the button 'Save' the system hashes the password locally and the information is posted to the server. A unique Company ID is returned by the system. Note this down and use it in all formal communications.
- b. Click the button 'Login' to load the Login Page. Login to the system (securely) by entering your password and complete the registration process.
- c. Select the option 'Complete Registration' to enter the registration details.
- d. Select the action – 'Fill Registration Form' and click the button – 'Go' to enter the registration information common to all the divisions in the organisation. Click the button – 'Save' at the bottom of the form to save the information entered in the registration form.
- e. Select the action – 'Registration Templates' and click the button – 'Go' to view the list of Trade / Division-specific templates. Templates are forms that are available to capture information in tables and documents that can be uploaded. Click the button – 'Save' / 'Upload' as the case may be in each template to save the information entered in each template.
- f. Click the button 'Done' at the top of the screen to submit the registration data to the buying organisation for scrutiny.

Note: *The login / User ID and password will start working only after the Registration Application is scrutinised and approved.*

6. Public View of Tenders

Click the option " " on the Business Page to see the list of online tenders. The options allow you to filter the list by:

- Tender Status (Live / Active)
- Division
- Section
- Office

Click the tender number to see the detailed NIT of that tender. To participate in the tender it is necessary to log into the electronic procurement system.

7. Searching for a Tender after Login

To search for a specific tender the Supplier can highlight the radio-button corresponding to 'All Tenders' or 'Purchased Tenders' and clicking the 'Search' button. Purchased tenders are those tenders for which the user has registered annually. The Supplier can also search for tenders, which are at different transaction status like 'Live', 'Locked', 'Completed', 'Opened'. The Supplier

personnel can also select a tender of a particular 'Transaction Status'. The tender can also be searched by specifying the 'tender number range or the date range when the tender was prepared. These ranges can be specified in the 'From' and 'To' boxes.

The user can also opt to search for a tender by giving keywords. The keywords can be specified as whole expression, whole word or character string. The tender will be found out if it contains the specified keywords.

Click the 'Search' button to view the tenders.

The tenders that have not yet been approved can be viewed on clicking the 'List New Tenders' link. The user can make a bid for these tenders only after they have been approved.

8. Viewing the Tender List

The Supplier next sees the 'Tender List' page to see the particular tender selected. The summary view shows the 'Tender No', 'Tender Ref No', 'Tender Date' and 'Tender Status'. The Supplier can buy documents and bid for tenders that are 'Live'. Select the tender by clicking on the 'Tender No' link, which is shown in blue colour to see the details.

If there are many tenders, the user can search for tenders on different pages by clicking on the page numbers highlighted in blue colour at the bottom of the page.

9. Tender Details

Once the seller selects a particular tender from the list, he can view the complete tender details on the 'Tender Notice Text Display' page. This page gives the user an overall idea about the tender.

The 'Tender No', 'Tender Ref No' and 'Tender Date' is shown. Under 'Tender Notice Text Contents', the Supplier can view the 'Notice Text' put up by the buyer. Under 'Items', the Supplier can view the 'Sr No', 'Item Description', 'Quantity' and 'EMD Value' that he has to pay. The user can get an estimate from the item quantity about the number of items he is expected to supply. The 'Fee Structure' is shown to the Supplier, which gives the details of fees that the user is supposed to pay.

The Schedule of dates for various stages is displayed. The 'Start' and 'Expiry' dates for buyer and seller stages are shown. The user has to submit his bid before the expiry date for 'Document Purchase' and 'Bid Preparation' stage. The envelope code is shown as single, commercial or technical. The bids have to be submitted in the envelope specified and before the expiry date for that particular round.

When the Supplier logs in for submitting the bid, he can view the bid he has prepared on this page by clicking the 'View Bid' button. This will take the user to the 'Bid Details' for seller page. The 'Bid No' and 'Bid Date' along with the remarks entered are shown. The additional documents attached can also be viewed by clicking on the document name highlighted in blue colour. The various 'Header' pages can also be viewed by clicking on the page numbers highlighted in blue colour. If the header pages are of 'Normal' format, the entered information is in the encrypted form. Decrypt the information by clicking on the 'Browse' button and selecting the private key. Now click on the 'Decrypt' button to view the entered information. The user can go back to the main page by clicking the link 'Main'. The user can also view the items that the buyer has added to the tender. Select on the item to view by clicking on the red coloured 'Tick Mark' from the column 'Select'. On doing this the user can view all the item pages. Click on the 'Action Page' button.

The user can start the Bid Preparation process by clicking the 'Purchase Tender' or the 'Action Page' button in case he has already purchased or downloaded tender.

10. Document Purchase and Bid Preparation

The user can start the process of 'Document Purchase' and 'Bid Preparation'. The user can click the 'Proceed' button to proceed with the process if 'Document Purchase' and 'Bid Preparation' is a valid action. The 'Tender No' and 'Tender Ref No' are shown. The Supplier can see his 'Company ID' and 'Current Sequence No'. The current sequence 'Start' and 'Expiry' date is shown which informs the user when he has to submit his bid. The 'Schedule Info' for buyer and seller actions along with the status is displayed. If the tender is authorized, the status is 'Release Tender'. If the 'Bid Preparation' stage is not yet started, the status is 'Pending'. If 'Document Purchase' and 'Bid Preparation' is a valid action, the Supplier is asked if he wants to proceed with the transaction. To do this, click the 'Proceed' button.

On clicking the button 'Post Query' button, a query list showing the 'Tender No' and 'Query No' is shown. A new query session can also be started.

On clicking on the 'View Schedule' button, the Supplier can view the schedule for the specific tender. The current stage is shown in bold text in the colour blue. To go back on the previous page, click on the 'Main' link, at the bottom of the page.

11. Bid Preparation

The next page is the main page of the workflow. The user has to complete all the tasks from the actions box. This is the stage of bid preparation. Choose 'Load Forms' in the 'Action' menu and click the 'Go' button. Load the forms by clicking on the 'Load Forms' button.

Likewise, choose the 'Send Public Key' in the 'Action' menu and click the 'Go' button. Here the seller has to send the public key of his digital certificate that will be used to encrypt the data filled up by the Supplier. Fill up some value in left side box and click the 'Encrypt' button. Encrypted data string can be seen in the middle box. Click the 'Decrypt' button and select the appropriate digital certificate that will give the value in the right side box, which is same as the value in the left side box if the certificate chosen is the right one. Click the 'Done' button to proceed..

Clicking the 'Done' button will complete the task and clicking on the 'Exit' button will take you to 'Tender Search' Supplier page. Choose 'Accept Terms and Conditions' in the 'Action' menu and click the 'Go' button. The Supplier has to accept the form by clicking on the option 'Accept' so as to proceed with tender document download. Select the 'Online Bid Preparation' in the 'Action' menu and click the 'Done' button.

Choose the 'Pay' option in the 'Action' menu and click the 'Go' button.

12. Making Payment

The user can make online payment using this option. He can also view the payment details after the payment is complete.

This is the 'Payment Entry / Edit' page showing the 'Stage', 'Description of Payment', 'Company Name', 'Payment No', 'Tender Ref No', 'Pay Code as Bid', 'Net Amount' and 'Amount Paid'.

Select the 'Online Payment Mode' and click 'Make Payment' to enter payment details. This is only for those Suppliers who have chosen to make payment through credit card. The details to be filled include the 'Name' (as appearing on the card of the user), 'Contact Details' and 'Delivery Place'. After filling the form, click the 'Submit' to enter the payment gateway.

Click the 'View Payment Details' button to get details about the payment made. Clicking on the red coloured 'Tick Mark' in the 'Select' box can do this. The user can view payment details like 'Amount Paid', 'Account Name' and 'Account number'. Click the 'Validate Payment' button to validate the payment he has made. The user then cannot make any changes in the payment details. On clicking the 'Validate Payment' button, a message is displayed saying that the payment is complete.

Click the 'Done' button to complete the task or Click the 'Exit' button to go to the 'Payment Entry / Edit' page.

13. Download Tender Document

After the 'Payment Task' is complete, click on the 'Proceed' button to download the tender document.

If the user chooses 'Online Bid Preparation', choose the 'Download Document' option from the 'Actions' menu and click the 'Go' button. The user can download the tender document in this manner. The user can then save the tender document on his local computer. This saves the user the task of collecting the tender document.

Click the 'Download Tender Document' button and check if the radio-button next to the 'Save' option is highlighted. Click the 'OK' button to save the document. Now choose a path where the tender document needs to be saved in the 'Filename' textbox and click the 'Save' button. Close the window after tender document is saved.

The user can download all the supporting documents that the buyer has attached such as images, drawings, pictures and all other attachments. These are attached as they are relevant and give additional tender information.

Click the 'Download Supporting Documents' button to save the documents in the same manner as the tender document.

On clicking the 'New Tender' link the user can view the tender in a new window .

The user can get a receipt for the tender download which he can print. This will serve as a proof that the user has downloaded the tender. Click the 'Generation of Tender Download Receipt' button. This opens a new window that shows the 'Tender Number', 'Tender Reference Number', 'Company Name', 'Document Number' and 'Submission Mode'. The 'Date' (of generation of receipt) and the 'Verification Code' is also displayed.

On clicking the 'Save the Tender Download Receipt' button, the Supplier can get a receipt for document download. Click the 'Download Receipt' button and check the radio-button besides 'Save' is highlighted, click the 'OK' button. and choose a path to save the receipt in the 'File Name' name textbox. Click the 'Save' button and then the 'Close' button to close the window.

The user can also print the receipt on paper by clicking 'File > Print' from the menu bar. Click the button 'Done' button after completing this task.

14. Enter Bid Header Data

The next page initialises bid preparation phase. Click the 'Proceed' button to start with actual bid preparation. The user can edit bid at header level and item level. The user can complete these tasks in any order. Although it is preferred, that the user chooses to edit the bid at header level before the item level.

If the user chooses 'Edit Bid Header Data' and clicks the 'Do' button, the 'Action' menu has the options 'Edit Header Contents', 'Edit Common Forms' and 'Upload Additional Documents'. Choose 'Edit Header Contents' in the 'Action' menu and click the 'Go' button. The user can attach a header to his bid and fill information such as the 'Bid Reference Number'. The user can set the 'Bid Date' and additional remarks about the bid header. Click the 'Save' button after entering all the information. A message is displayed after bid header details are saved successfully. Choose 'Edit Header Forms' in the 'Action' menu and click the 'Go' button. The user can enter information in the forms attached by the buyer for all the envelopes. Click on the red coloured 'Tick Mark' in the column 'Edit'.

If the attached page is of 'Normal' format, enter information in all fields. On clicking the underlined description highlighted in the blue colour, the user gets instructions on how to fill the information. Enter information of specified type as 'Character' or 'Long Text'. After filling necessary details click the 'Encrypt' button to encode the information. Click the 'Save' button to save the information. If there are any changes to be made to the data after saving click the 'Decrypt' button. Click the 'Get Amount in words' button to convert any currency numeral value into words. If the attached page is of 'Extensible' type then the user can add new rows by clicking the 'Add' button.

The other pages can be edited by clicking on the page numbers highlighted in the blue colour. The user can also edit all envelopes by clicking on the envelope name highlighted the blue colour.

On clicking the 'Form List' button, the user gets the list of all forms attached by the buyer.

The user can provide additional information to the buyer, which he feels is relevant for his bid. The user has not included this information in the forms attached by the buyer. This information includes all attachments in the form of images, drawings, pictures and others. The user can enter a description of the documents that he is attaching in the textbox.

Click the 'Insert Document' button to attach the additional documents. Now the user can specify a name for his document and attach the document by clicking the 'Add Doc' button. This loads a new page, which asks the user to choose the image or text file to be uploaded. Click the 'Browse'

button and specify the path where the document is saved on your local computer. (E.g., if the file to be uploaded is in D drive with file name as attach .txt, then the path would be 'D:/attach .txt'. Click the 'Open' button and then click the 'Upload' button. This will upload the necessary document.

After the document is successfully uploaded, a message is displayed to that effect. The user can upload multiple documents by repeating the procedure. The document can be deleted if the user feels it is not required, by clicking on the red coloured Tick Mark' in the column 'Delete'.

Click the 'Done' button after uploading all the documents to go to the next task.

15. Enter Bid Item Data

The 'Bid Preparation' workflow is now at the task 'Edit Bid Item Data'. The actions box has options to 'Add or Delete Items', 'Edit item data' and 'Edit Item forms'. Choose the task 'Add or Delete Items' in the 'Action' menu and click the 'Go' button.

The user can select a particular item from item list provided by buyer and add the item in his bid. Click the 'Add' button to select items and select item by clicking on the red coloured Tick Mark' in the select box. The user can also delete the item by clicking on the red coloured 'Cross Mark' in the column 'Delete'. The description is available for each item.

On clicking the button 'Item List', the user gets a list of all items added by him. Now select 'Edit item data' from the 'Action' menu and click the 'Go' button. The user can edit the header for each item added by buyer at item level. The user can select an item for editing by clicking on the red coloured 'Tick Mark' in the column 'Edit'. The 'Item Group ID', 'Description' and 'Item Type' is displayed. In the box of 'Tendered Quantity', the user can enter the quantity that he can supply. This is specified by the buyer if the item has been added from the 'System Masters'. The date on which user can deliver item can be specified in the 'Start Date'. Click the 'Save' button to save entered data.

The item for which the user is entering data is highlighted. To edit more items, click the 'Next Item' button. To edit the last item in the list, click the 'Last Item' button. On clicking the 'Item List' button the user gets a list of all items. A message is displayed after the item details are saved successfully. Select 'Edit Item Forms' in the 'Actions' menu and click the 'Go' button. The user can now edit the pages added at item level. The user can edit pages attached by buyer at item level. Select the item for page editing by clicking the red coloured 'Tick Mark' in the column 'Select'. The item can be selected from the item description provided in the column. The item for which the user is entering data is highlighted. To edit more items, click the button 'Next Item'. To edit the last item in the list, click the button 'Last Item'. On clicking the 'Item List' button the user

gets the list of all items. To edit other pages click on the page numbers highlighted in the colour blue. To edit other envelopes, click on the envelope name highlighted in the colour blue.

For 'Format' type of document click the red coloured 'Tick Mark' in the column 'Select' and then upload the document by clicking the 'Add Doc' button. This opens another page, which asks the user to choose the image or text file to be uploaded. Click the 'Browse' button and specify the path. Then click the 'Upload' button. If the document uploads successfully, a message will be shown. Now click the 'Save' button. The document can also be submitted manually. For format type 'Normal', enter the necessary information such as 'type of currency, qualifying numeric value, qualifying currency and others'. The fields marked with the asterisk (*) are mandatory. The user can fill alphanumeric data for character fields. On clicking on the underlined field highlighted in the colour blue the user gets instructions about what is to be filled in the field. This information is available in a new window. The entity number for which the instructions are available is also shown. Click 'Encrypt' after entering information in all fields. This is used for security purpose and encodes the information entered by the user. Now click the 'Save' button which displays a message that the page has successful updated. Click the 'Browse' button and select the key for decrypting the information. Now click the 'Decrypt' button which decrypts the information. On clicking the 'Item List' button the user gets the list of all items. On clicking the 'Page List', a list of all the added pages is displayed. The user can go to the other pages by clicking the page number highlighted in blue colour. The user can also edit the different envelopes by clicking on the envelope name highlighted in blue colour.

Click the 'Done' button to complete this task and go to next task.

16. Validation of Bid Data

The bid is now at the 'Validation Stage'. Select 'Validate' from 'Task' menu and click the 'Done' button. At this point, if the user chooses the 'Rework' option he will have to repeat the previous tasks. The user has to take care that only the 'Validated' option is chosen before clicking the 'Done' button. The 'Bid Preparation' stage will now be 'Sign of Hash'. The Supplier has to sign the bid before sending it. A unique digital fingerprint (the hash) is generated for this purpose. Select option 'Sign of Hash' in the 'Action' menu and click the 'Go' button.

Click the 'Accept & Seal' button to seal the bid then click the 'Sign Hash' button to sign the hash value with the digital certificate and then click the 'Send Signed Hash' button to send this value. The hash value has to be generated for all the envelopes. To select various envelopes click on the link in blue coloured text at the end of the page for each envelope. Select the option 'Sign and send' in the 'Action' menu and click the 'Done' button to complete the bid preparation and hash submission process.

17. Submit Common Forms and Deviations

Once the buyer officer receives all the bid hashes of all the Suppliers, there will be a super hash generated by the officer for each and every envelope. This super hash is available for all the sellers to view after which they can start with their bid data submission.

The Supplier has to login with his 'User ID' and 'Password' and go to particular tender. Click the link 'Action Page' and then click 'Proceed'. Select the option 'EMD payment' in the 'Action' menu and click the 'Go' button. Select the EMD payment mode (In which Supplier has sent his EMD manually) and click the button 'Make Payment'. On the next page enter all the details and select the checkbox manual submission and click the 'Save' button. Click the 'Done' button to go to next page. Select the 'Submit Common Forms' option in the 'Action' menu and click the 'Go' button. The user can submit forms attached at header level. Select form to be submitted by clicking on the red coloured 'Tick Mark' in the column 'Submit'. The user can submit forms attached to all envelopes by clicking on the envelope name highlighted in blue colour.

Click the button 'Decrypt'. Click the button 'Browse' and specify the location of the digital certificate and view the decrypted information. Next, click the button 'Encrypt' button to encode the information. The 'Submit' button is now active. Click the 'Submit' button to submit particular form. A message is displayed after form is submitted successfully.

The user can submit other pages attached at header level by clicking on the page numbers highlighted in blue colour. The user can view a list of pages attached at header level by clicking the button 'Form List'.

18. Submission of Deviation Entities

All the deviation entities, which are filled by the Supplier during bid preparation, need to be submitted during bid submission in the same manner as the submission of bid forms. Select 'Submit Item Forms' option in the 'Action' menu and click the 'Go' button. The user can submit the particular form attached at item level. Select the page to be submitted by clicking on the red coloured 'Tick Mark' from the column 'Select'. The user can select pages for other items by clicking the 'Next Item' button. On clicking the 'Item List' button, a list of added items is displayed. The user can select items attached for other envelopes by clicking envelope name highlighted in the blue colour.

Click the 'Decrypt' button. Click the 'Browse' button and specify the location of the digital certificate and view the decrypted information. Next, click the 'Encrypt' button to code the information. The Submit button is now active. Click the 'Submit' button to submit particular form. A message is displayed after form is submitted successfully. The user can submit other pages attached at 'Item Level' by clicking on the page numbers highlighted in blue colour. The user can

view a list of pages attached at that 'Item Level' by clicking the 'Form List' button. On clicking the 'Item List' button, a list of added items is displayed.

19. Updating the Item Rate Form

After the Financial Evaluation sequence in Tender Schedules without Reverse Auction (RA) and after the Reverse Auction (and before Financial Evaluation) in Tender Schedules, the supplier has to update his rates on the electronic procurement system: In the case of non-RA Schedules the negotiated rates and in the case of Schedules with RA the RA rates.

Click the button – 'Proceed' on the Action Page. The system will display the original price in the Commercial / Price bid on the left side of the page. The system provides an option to enter the revised rate on the right side. It is essential to click the button – 'Calculate' and then the button 'Save' at the bottom of the page to save the data on the system. The update of the revised (Negotiated / RA Price) has to be done item-wise by selecting the items in the bid items list one at a time. Only those items will be listed that have been bid for at the time of Bid Preparation and Hash Submission.

Click the 'Done' button to complete Item Rate Form Sequence.
