

GRASPINNO

Transnational model, strategies and decision support for innovative clusters and business networks towards green growth, focusing on green e-procurement in EE/RES for energy refurbishment of public buildings.

Deliverable: 3.4.2 Upgraded tools with updated user manuals for GRASPINNO pilots and workshops – eGPP tool User Guide

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1 INTRODUCTION

1.1 Scope and objectives of the deliverable

This report represents the "Upgraded tools with updated user manuals for GRASPINNO pilots and workshops – eGPP tool User Guide" deliverable for the GRASPINNO project and describes part of the work undertaken in WP3 "Testing". The main objective is to provide the Public Authorities' users with a User Guide regarding the GRASPINNO upgraded electronic Green Public Procurement tool (e-GPP tool). This specific tool helps each Public Authority (buyer) in preparing draft "green" specifications, indicative budget and a tender's technical specifications.

The GRASPINNO online e-GPP tool provides the following functionality:

- A Web Site which provides to the users (SMEs and Public Authority (PA) staff) with access to the tool functionality, as well as typical authentication control and appropriate linking / redirection to the databases and their WEB interfaces. The tool, also, supports PAs to publish a single WEB page with information about a new tender (short description, basic data, and links to download tender docs).
- A tool section which supports browsing and search on the contents of the library with green specs of products and sustainability issues.
- A search facility which allows searching a catalogue of product suppliers to identify the suppliers that fulfill certain green procurement criteria as these are input by the Public Authorities for a new procurement of "green" products / services.
- A functionality to search the PA database to extract all relevant specs for a given category of product/service to be procured.
- Functionality by the tool to produce a standalone document of:
 - "Green" specs the new product/service should fulfill.





- List of suppliers that can fulfill the specs.
- o Indicative budget of the procurement based on market prices.
- Functionality which allows PAs to search and identify offered products/services (i.e. from the "Suppliers (SME) database" which satisfy certain input green criteria and product/service specs).
- Creation of a draft tender in a format that is editable with standard text editing tools (e.g. Microsoft Word).

1.2 Concept and Terminology

There are several key concepts and terms with which the user should be familiarized before using the e-GPP tool. These are listed below:

- **Tender:** a published tender for green public procurements.
- **e-GPP:** electronic green public procurement.
- **Green specification:** a set of characteristics and features related to a green product.
- **Tender Information Package:** a set of information that describes the main specifications and criteria that the procured green product(s) should satisfy. In addition, it includes information about complying products from registered SMEs.
- **Category:** a (green) category of products that can be procured through GRASPINNO tool (e.g., IT Equipment).
- Criterion: a specific criterion that a procured product can or must satisfy so that it is characterized as green product. These are used for comparing the various products and defining the degree of their "greenness".
- **Product type:** a term from a terminology that categorizes products of a specific green category.
- Complying supplier/product: a supplier/product that complies with the green specifications and criteria specified in a Tender Information Package.





• **LCC:** Life Cycle Cost calculator, which enables public procurers select the most cost & energy-efficient offered solution.

Note: Some of these terms may be used with other meanings in other places of GRASPINNO project or in other related projects and tools.

1.3 Structure of the deliverable

This deliverable is structured in 2 chapters:

Chapter 2 **"e-GPP tool User Guide"** describes step by step all the functionalities of the GRASPINNO upgraded e-GPP tool, in order to give assistance to users using this particular system.



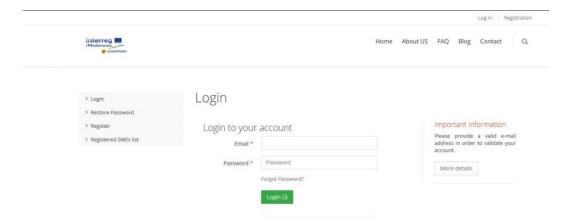
2 e-GPP TOOL USER GUIDE

2.1 General description

In this section, we present the detailed guidelines regarding the use of the GRASPINNO online e-GPP tool. In order to make this User Guide more comprehensible, the guidelines for each specific tool's section/page are presented separately.

2.2 e-GPP tool Login

In order to log into the e-GPP tool, the PA user has to visit the relevant GRASPINNO website, login using his/her credentials and choose the e-GPP tool from the top bar menu, and then he is redirected to the login page shown below. After filling in her/his credentials the user is redirected to the main page ("Home" page) of the e-GPP tool.



Picture 1: Login page

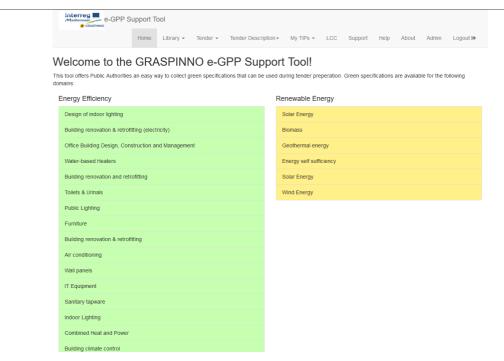




Picture 2: Menu for access to e-GPP tool

2.3 "Home" Section

After its successful login, the user has access to the tool's "Home" page. In this page the user is able to see general information about the GRASPINNO online e-GPP tool. Moreover, the user can see the recent tenders created and published through the tool.



Picture 3: e-GPP tool "Home" page





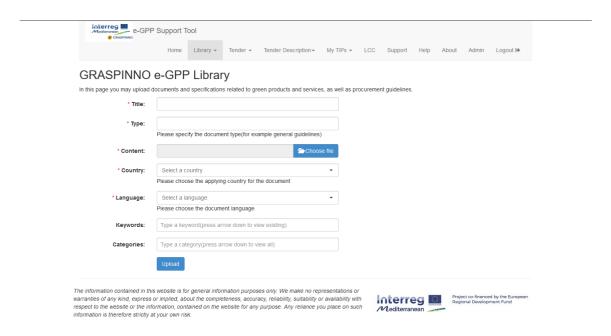
2.4 "Library" Section

In this section, each user is able either to upload or search for documents related to "green" specifications of products/services needed to be procured. It is divided in two sub-sections:

- "Upload document" subsection.
- "Search documents" subsection.

2.5 "Upload document" subsection

In this subsection the user can upload documents and specifications related to "green" products and services, as well as procurement guidelines. The user will be prompted to fill in a set of fields; most fields should be filled in, in order for the document to be uploaded:



Picture 4: "Upload document" subsection

- Title: The title of the document.
- Type: The type of the document (i.e. EU "green" specs for IT equipment).
- Content: Selection of the appropriate file from the user's local disk.



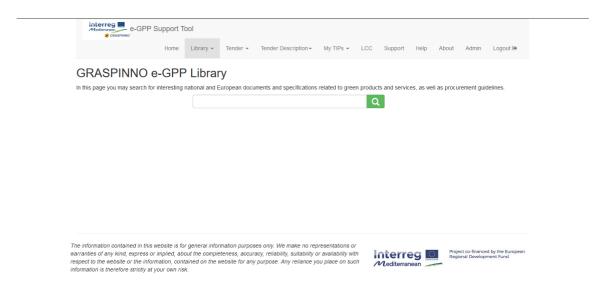


- o *Country:* Selection of the applying country for the document.
- Language: Selection of the document's language.
- Keywords: The user can type keywords related to the document's content or select from a dropdown list with predefined keywords.
- Categories: The user can type categories related to the document's content or select from a dropdown list with predefined keywords.

When all fields are filled in, the user clicks on the "*Upload*" button in order for the document to be uploaded.

2.5.1 "Search documents" subsection

In this page the user may search for national and European documents and specifications related to green products and services, as well as procurement guidelines.



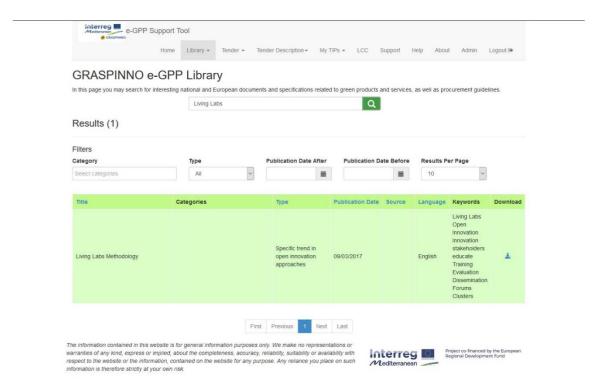
Picture 5: "Search documents" subsection

The user should enter specific words in the search tab and then by clicking the system will display all related documents. In case the





user leaves the search field empty and clicks this button, the tool will display all available documents.



Picture 6: Search results

The table includes the following document details:

- o *Title:* the title of the document.
- o *Category:* the categories associated to the specific document.
- Type: the type of the document (i.e. EU "green" legislation, "green" specs, etc.).
- Publication Date: timestamp of the date the document was published.
- o **Source:** the document's source.
- o **Language:** the document's language.
- **Keywords:** the associated keywords to the specific document.
- o **Download:** a link to download and open the document.



When the search results are displayed, the user can apply various filters (Category, Type, Publication Date After, Publication Date Before, Results per Page), in order to filter the search results and find more easily the documents he wants. By selecting the user will be able to download the respective document.

By clicking on the titles of the result table columns, the user can sort the results in ascending or descending order.

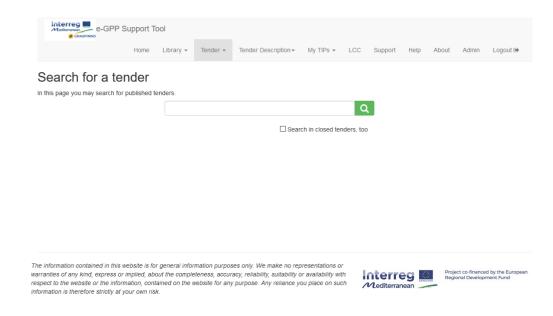
2.6 "Tender" Section

In this section the user is able to search for tenders already created/published or publish a newly created tender. This section is also divided in two sub-sections:

- "See all tenders" subsection.
- "Publish a tender" subsection.

2.6.1 "See all tenders" subsection

In this page the user may search for published tenders.

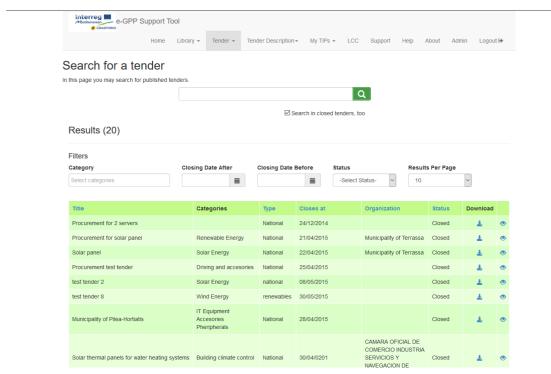


Picture 7: "See all tenders" subsection





The user should enter specific words in the search tab and then by clicking the system will display all related tenders that are still open. In case the user leaves the search field empty, the tool will display all available tenders. Moreover, the user can tick the box "Search in closed tenders, too", so as the tool to display tenders that are closed, at present.



Picture 8: Tenders search results

The table includes the following information:

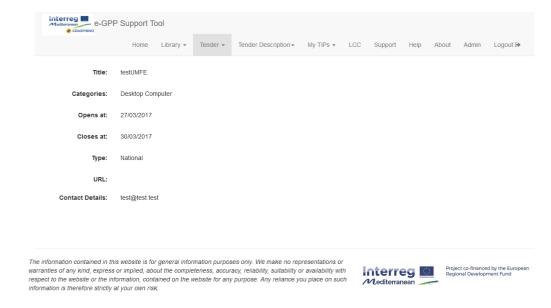
- Title: the title of the tender.
- Categories: the associated categories to the specific tender.
- Type: the type of the tender (i.e. national, regional, open, closed, etc.).
- o *Closes at:* date when the tender closes.
- o **Organization:** organization which published the tender.
- Status: the status of the tender (i.e. closed, open, etc.).





o **Download:** link to download/open the tender file.

When the search results are displayed, the user can apply various filters (Category, Closing Date After, Closing Date Before, Status, Results per Page), in order to filter the search results and find more easily the tenders he is interested in. By selecting the user will be able to download the respective document. By selecting the user can see general information about the respective tender, as submitted through the "Publish a tender" subsection.

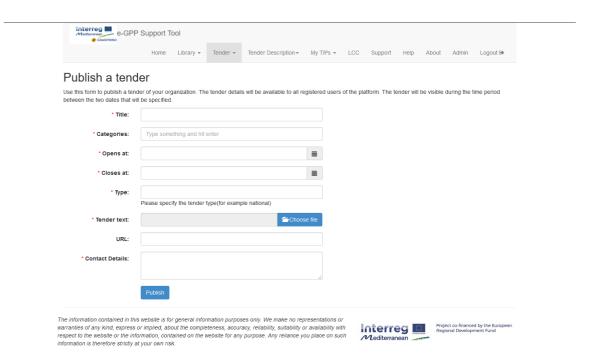


Picture 9: Tender's General Information

2.6.2 "Publish a tender" subsection

In this section the user can publish a tender on behalf of his organization. The tender details will be available to all registered users of the platform. Each tender will be visible during the time period between the two dates (open date, closure date) that will be specified. The user will be prompted to fill in a set of fields; most fields should be filled in, in order for the tender to be published:





Picture 10: "Publish a tender" subsection

- Title: The title of the tender.
- Categories: The categories associated to the tender (i.e. IT equipment, photovoltaics, etc.).
- Opens at: Selection of the date the tender is planned to open.
- Closes at: Selection of the date the tender is planned to close.
- Type: Selection of the tender's type (i.e. national, regional, etc.)
- Tender text: Selection of the appropriate tender docs from the user's local disk.
- URL: link to the tender's website/webpage/dedicated link. This field is optional.
- Contact Details: the contact details (i.e. phone, fax, email, etc.) of the person responsible for the tender.





When all fields are filled in, the user clicks on the "**Publish**" button in order the tender to be published in the tool.

2.7 "My TIPs" Section

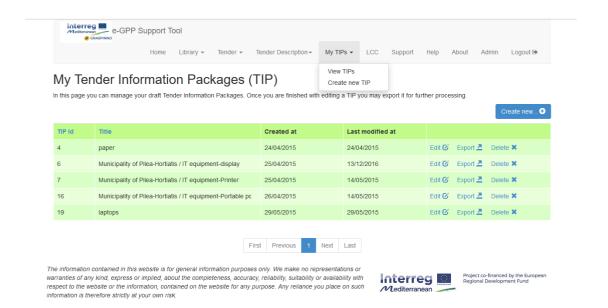
In this specific section of the e-GPP tool, a user can create a new TIP (Tender Information Package) or view TIPs he has already created. This means that this section, includes 2 different subsections:

- "View TIPs" subsection.
- "Create new TIP" subsection.

2.7.1 "View TIPs" subsection

This section displays a list with all the available TIPs created by the user. In this page the user can manage his own draft TIPs (Tender Information Packages). Once the user is finished with editing a TIP he may export it for further processing. The exported document (rich text document format, RTF) contains a summary of the TIP that also includes the market offerings, which comply with the criteria and specs chosen. Also, if no complying products are found, it provides recommendations which are automatically generated by the system.





Picture 11: "View TIPs" subsection

The displayed table includes the following information:

- o **TIP Id:** The specific ID of a TIP
- Title: the title of the TIP
- Created at: the date the TIP firstly created
- Last modified: the date of the TIPs most recent modifications

Moreover, there are various options for the user to manage each specific TIP. More specifically:

Edit is chosen, then the user is redirected to fill in or change any information for this specific TIP.

Export a document containing all data of a TIP, for further processing. If export is chosen, then a text file (in .RTF format) pops up with all information available for that TIP.

: Delete a specific TIP. If delete is chosen the user is asked to confirm or not the deletion of the TIP.





: When selected, redirects the user to the "Create new TIP" subsection.

The export functionality outputs all TIP related data as an editable document. This includes, basic TIP information, list of criteria met, list of products and services matching the TIP requirements, market prices, etc. A sample of the product table that is exported is depicted in the following picture.

Complying Products

Requested Services: Warranty
Estimated Price Range: 120
Expected Price: 122

Average Price: 120

Product	WorkCentre
Name	3045
Price	120
Percentage Difference from Average Price	+0%
Percentage Difference from Expected Price	-836%
Services	Warranty(Four years), Technical Support(One year)
Power Consuption	+

Picture 12: Extract from TIP export file

2.7.2 "Create new TIP" subsection

In this page, the user can create a new TIP by filling in the following tabs:

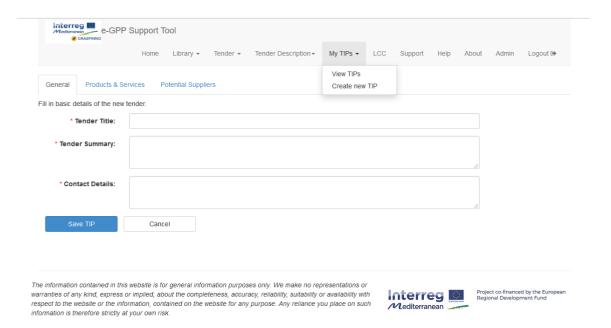
- General
- Products & Services
- Potential Suppliers

"General" tab

This section asks for some mandatory information on the Tender title, Tender summary and Contact details. "Save TIP" button should be clicked to ensure information backup.







Picture 13: "Create new TIP" page / "General" tab

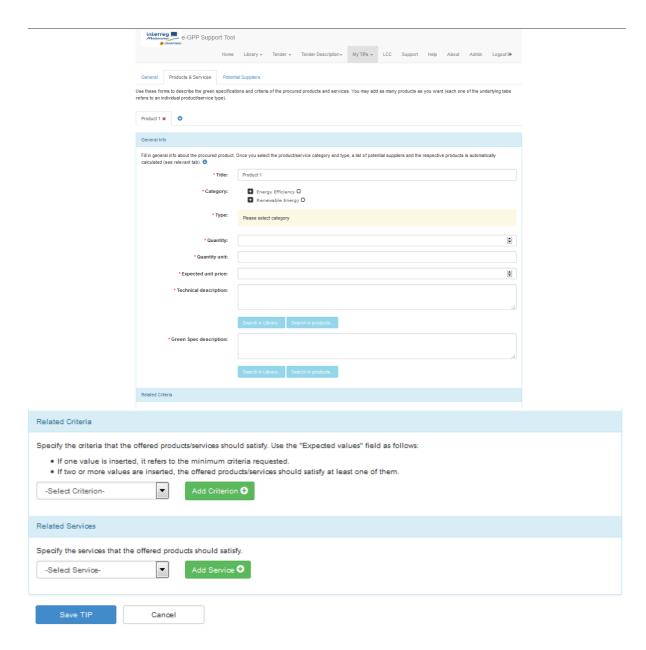
"Products & Services" tab

The user must fill in information to be stored in the system under the relevant product sheet. The user must use these forms to describe the green specifications and criteria of the procured products and services.

For each product/service that needs to be procured the following form must be filled in:







Picture 14: Add product/service to a TIP

For each product/service the user should provide data regarding the following fields:

- o *Title:* Title of the product/service to be procured.
- Category: Select the category that the product/service belongs to. Under section category the major options are
 Energy efficiency (selection between building climate

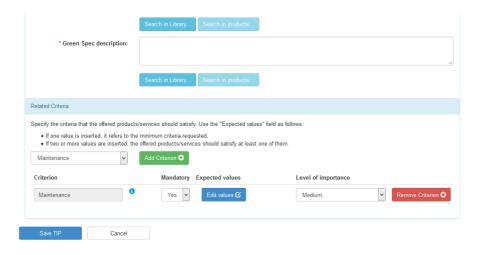




- control, building renovation and retrofitting, it equipment, public lighting) and **Renewable Energy** (selection geothermal energy, solar energy, wind energy).
- Type: The user must select the type of the product/service. The available options here are generated automatically, based on the user's selection in the field "Category".
- Quantity: Add the desired quantity of the product/service.
- Quantity unit: Specify the quantity unit (i.e. Kg, pieces, meters, etc.).
- Expected unit price: Indicate the expected unit price, based on the regular market prices for the specific product/service.
- Technical description: Provide a brief description of the technical specifications of the procured product/service. In case the user is not aware of specific technical specifications, he is able to search for data in the tool's library (selection of "Search in library" button) or in the products already available in the tool's DBs (selection of "Search in products" button).
- Green spec description: Provide a brief description of the "green" specifications of the procured product/service. In case the user is not aware of specific technical specifications, is able to search for data in the tool's library (selection of "Search in library" button) or in the products already available in the tool's DBs (selection of "Search in products" button).



A very important activity, while adding products/services in a TIP, is the allocation of "green" criteria to each product/service. At the bottom of each product's/service's form there is a section entitled "*Related Criteria*". From the drop-down menu, the user can select a specific criterion and allocate it to the product/service. This drop-down menu is created automatically based on the user's selection in the "Category" field.



Picture 15: Add a criterion to a product/service

When a criterion is added, the user is able to edit it. This means that the user has the following options:

- Receive textual information regarding the meaning of the criterion.
 Define whether the criterion is mandatory or not.
 Edit values
 Edit the expected values of the criterion.
- Set the level of importance (low, medium, high) for the specific criterion.
- o Remove Citerion •: Completely remove the criterion from the product/service.





In the Related Services section of this page, the user can select a specific desired service and assign it to the product. This drop-down menu is created from a list of predefined services and it is not associated with a specific product category or type.

When a service is added, the user has the following options:

: Receive textual information regarding the meaning of the service.

Remove Criterion :: Completely remove the service from the product.

Service and Support 3-Year
Limited Hardware Warranty8 and
3-year NBD On-Site Service alor Remote Diagnosis Optional Del ProSupport9 is designed to rapidly respond to your businessed." Sneeds, help protect your investment and sensitive data, and provide enhanced proactive support services to help reduce risk and complexity within your IT
service

Save TIP

Cancel

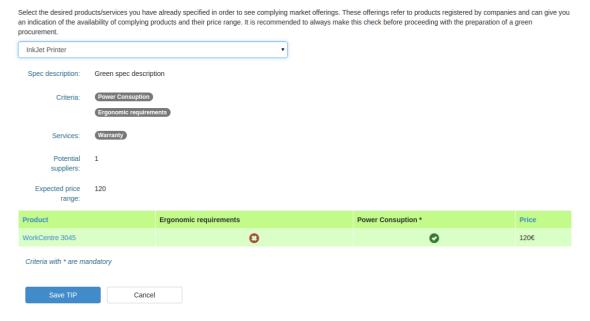
Picture 16: Related Services

Finally, "Save TIP" button should be clicked to ensure information backup.

"Potential Suppliers" tab

By choosing the product or service which the user has created, all market offerings, which comply with the criteria and specs chosen, appear in a list. The user is invited after filling the form for the product/service, to first check all relevant and open listings.





Picture 17: Potential suppliers

By clicking on a specific product, the user can see if there are any products that comply with the criteria and the services he entered. The criteria marked with an asterisk (*) were added as mandatory. Criteria not marked with (*) are non-mandatory and the listed products do not necessarily comply with the non-mandatory criteria. On the other hand, all listed products offer the services the user has already added.

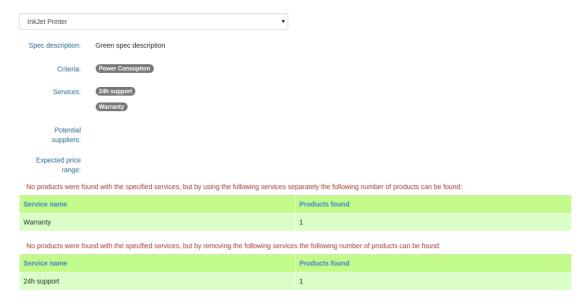
By clicking on the product name, the user can view some basic information regarding this product. The complete list of services this product offers is also displayed, alongside with the offered service duration (in parentheses).





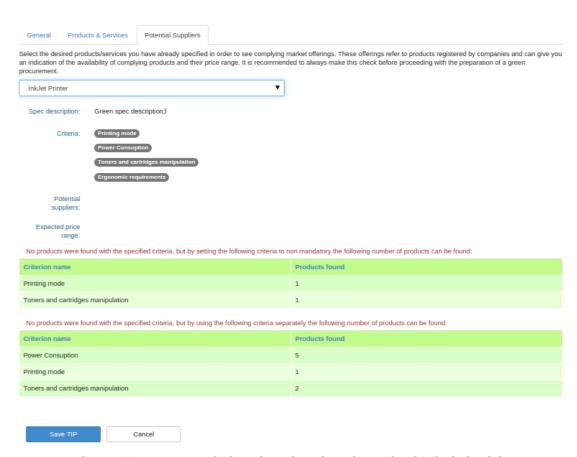
Picture 18: Complying product details

If no complying products are found due to strict mandatory criteria or services, the system automatically generates recommendations. In the example of the following picture, the "24h support" service is not offered by any of the products.



Picture 19: Recommendations for relaxation of search criteria (services)





Picture 20: Recommendations for relaxation of search criteria (criteria)

2.8 "LCC Calculator" section

In this specific section the LCC tool, which supports public procurers to select the most cost & energy-efficient offered solution, can be used. By filling in the respective fields (i.e. purchase price, products lifetime, average annual time of use, etc.), the user is able to calculate the life cycle cost of a specific product.





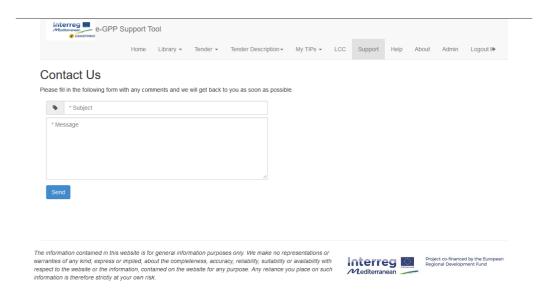
Picture 21: GRASPINNO eGPP tool's LCC calculator





2.9 "Support" section

The user has the option to fill in the form with comments and/or questions, and send it to the e-GPP support team. The e-GPP Support team is responsible for the functioning and the structure of the site.

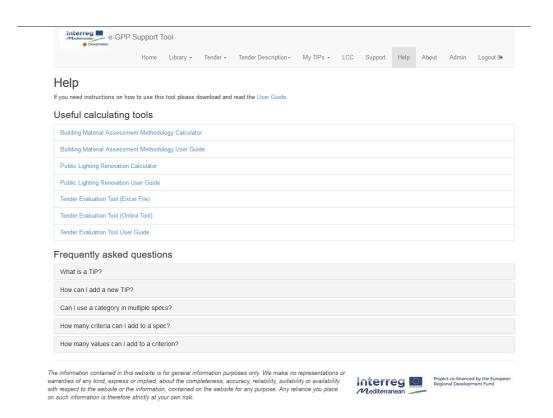


Picture 22: e-GPP tool Support page

2.10 "Help" Section

Users in need of information relevant to the structure and content of the e-GPP support tool may visit the Help section shown below. This section includes information on various questions, such as what a TIP is, how to add a new TIP, the use of multiple specs, the number of criteria to add to a spec, the number of values to a criterion etc.

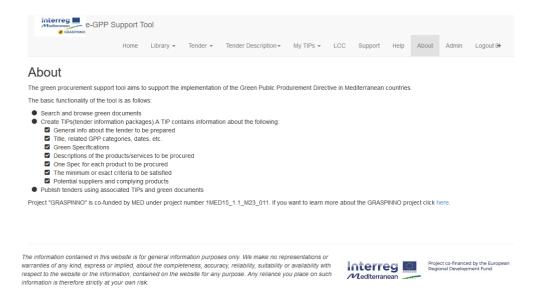




Picture 23: e-GPP tool's "Help" page

2.11 "About" section

A description of the GRASPINNO project and the basic functions used in e-GPP are offered in this section.



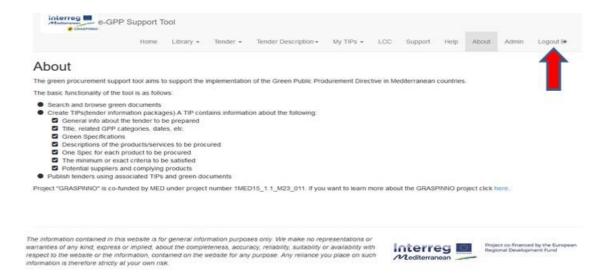
Picture 24: e-GPP tool "About" page





2.12 Logout from the e-GPP tool and return to DB Admin

By selecting the Logout button, the user exits from the e-GPP tool. By selecting the Admin button, the user returns to the DB Admin application.



Picture 25: Logout from the e-GPP tool