

Annex II

Post Contract Guide

After the Contract Award Notice is published a new task will appear named **Create Contracts**.

Task List	
List of Tasks	
CFT Title	Task
CT 2109/2019 - TENDER FOR THE SUPPLY OF RANGE OF MOTION SPLINTS	Create Contracts
CT 2109/2019 - TENDER FOR THE SUPPLY OF RANGE OF MOTION SPLINTS	Export Cft

When the **Create Contracts** task is selected the Tender Coordinator (TC) is presented with the list of contract/s to create for that particular call for tender (cft) as seen below. In case of lots there will be the option to create a contract for each lot.

Awarding				My Cft role is: PO/TC
CFT: CT 2109/2019 - TENDER FOR THE SUPPLY OF RANGE OF MOTION SPLINTS (Status: Awarded)				Show CFT Menu
Contract No	Economic Operator Organisations	CPV Code	Contract Value	
4767631	Inter_JV	33141114	139000.00 (EUR)	Create contract
Displaying the 1 match.				Page 1 of 1 << < > >>

Once the contract has been created a page named *create contract* will be displayed and the TC will have to fill in the contract information. To be noted that none of the fields in this page are mandatory and one can save the page as is. Most of the fields will be filled later into the lifetime of the contract. Also, when the page is saved the TC will be assigned/associated as Contracts Manager (CM) to this contract.

Create contract		My CFT role is: PO/TC
CFT: CT 2109/2019 - TENDER FOR THE SUPPLY OF RANGE OF MOTION SPLINTS (Status: Awarded)		Show CFT Menu
Contract Title:	CT 2109/2019 - TENDER FOR THE SUPPLY OF RAN	
Contract Number:	4767631	
Description:	CT 2109/2019 - TENDER FOR THE SUPPLY OF RANGE OF MOTION SPLINTS	
Supplies/Services/Works code:	33141114	
*Contract amount:	139,000.00	Euro (EUR) ▼
Lot number:	N/A	
Lot name:	N/A	
Dates:		
Planned start date:		
Actual start date:		
Contract Signature Date:		
Contract Completion Date:		
Modifications:		
+		
Total value of modification:	0.00	
Supplier Organisation		

Total value of modification:

Supplier Organisation

Contractors:

Assignment of Contract with details of new contractor:  

Details of sub-contractor and potential change of sub-contractor:  

Composition of JV/Consortia:

Other comments: Maximum Characters: 50000.

Competition details

Contract Manager/Representative name & contact:

Records of meeting dates, attached minutes: Maximum Characters: 50000.

Issues: Maximum Characters: 50000.

Complaints: Maximum Characters: 50000.

Modifications overview: Maximum Characters: 50000.

Any penalties applied: Maximum Characters: 50000.

Attachments:

Contract: No file chosen

Contract Addendum: No file chosen 

Completion report: No file chosen


*Status: 

Save Contract

(Fig.1)

The contract title, contract number, description, cpv codes, contract amount, lot number and lot name will be auto populated by the system. Lot number and lot name will only be filled if the cft contained lots. In the dates section there are four fields; planned start date, actual start date, contract signature date and contract completion date. To select a date for each field, click on the date symbol and select the correct date.

Dates:

Planned start date: 

In the modification section, when a modification is approved this can be added by selecting the + sign from the modifications section.

Modifications:

Total value of modification:

0.00

[Supplier Organisation](#)

Once the + sign is selected three fields will show up to be filled. In the *value of the modification* one should enter a numerical value. Below it, *justification of modification*, there is a line space to enter a short description of the modification and the third field is the *modification date*, one should click on the date symbol and select the desired date. Next to the date symbol there are a + and a – sign, these are used either to add another modification or delete it. Clicking on the *supplier organisation* link will pop up a window with the details of the winning bidder. The field *total value of modification* will be auto filled by the system which will show the total amount in value of modifications.

Modifications:

Value of modification (1):

Justification of modification (1):

Modification date (1):



Total value of modification:

0.00

[Supplier Organisation](#)

The next part refers to details related to the contractor.

Contractors:

Assignment of Contract with details of new contractor:



Details of sub-contractor and potential change of sub-contractor:



Composition of JV/Consortia:

A.S. Roma
Manchester United F.C.
F.C. Internazionale Milano

Other comments:

Maximum Characters: 50000.

Competition details

Contract Manager/Representative name & contact:

If the contract is assigned to another Economic Operator (EO) then the CM should click on the magnifying glass and select the assigned EO from the list of EO's registered to the ePPS. If the EO is not registered, then prior to assigning, they should duly register to the ePPS. Below it, there is the

option to add the *details of the sub-contractors*. If the winning bidder declared that he will be sub-contracting, again, the CM needs to select the magnifying glass and add all sub-contractors that will be working on the contract from the list of EO's registered in the ePPS. The *Composition of a Joint Venture (JV)* will be auto populated by the system if the winning bidder is a JV. The other comments field is an open text area where one can enter any comments related to the EO. Selecting the *competition details* link will send you to the cft core information in the ePPS. The *contracts manager name* field will also be auto populated by the system, basically the TC that creates the contract will become the CM and will be listed in that field followed by any other user/s that are associated as CM to that contract.

Records of meeting dates, attached minutes:	<div></div>	Maximum Characters: 50000.
Issues:	<div></div>	Maximum Characters: 50000.
Complaints:	<div></div>	Maximum Characters: 50000.
Modifications overview:	<div></div>	Maximum Characters: 50000.
Any penalties applied:	<div></div>	Maximum Characters: 50000.
Attachments:		
Contract:	<div>Choose File</div> No file chosen	
Contract Addendum:	<div>Choose File</div> No file chosen	<div>+</div>
Completion report:	<div>Choose File</div> No file chosen	
*Status:	<div>Pending</div>	<div>i</div>
<div>Save Contract</div>		

The next five fields; *records of meeting dates*, *issues*, *complaints*, *modifications overview* and *any penalties applied* are all text area fields, most of them self-explanatory, and must be filled according to the policies published. As for the attachments; there are three fields contracts, contract addendum, where multiple files can be uploaded using the + sign and the completion report. All files uploaded must be in pdf format and one must use the templates provided and follow the policies published. Finally, the status of the contract which contains four options; pending, active, cancelled and terminated. An explanation on each option (as seen below) can be viewed by clicking on the information (i) symbol.

Title	Description
Pending	This contract has been proposed, but is not yet in force. It may be awaiting signature.
Active	This contract has been signed by all the parties, and is now legally in force.
Cancelled	This contract has been cancelled prior to being signed.
Terminated	This contract was signed and in force, and has now come to a close. This may be due to successful completion of the contract, or may be early termination due to some non-completion.

Once all the required fields have been filled the TC has to select the save button to save the contract. As soon as the contract is saved the role of the TC will change to CM and the contract will be available for associated CM/s from the side vertical menu *CA contracts* and/or *My contracts* under *CA administration*

The screenshot shows the 'CA administration' sidebar menu on the left with options: CA Notices, CA management, User management, CA Contracts, and My Contracts. The main area displays a table of contracts:

Contract Title	Contract Number	Contracting Authority	Description	Action
CT 2109/2019 - TENDER FOR THE SUPPLY OF RANGE OF MOTION SPLINTS	4767631	Ministry for Training and Development	CT 2109/2019 - TENDER FOR THE SUPPLY OF RANGE OF MOTION SPLINTS	View Contract

Below the table, it indicates '11 results in total. Displaying: 11-11'. Pagination controls show 'Page 2 of 2' and 'Results Per page: 10'.

To edit or add content to the contract the CM must select view contract and click on edit contracts at the bottom of the page.

The screenshot shows a contract details section with a 'Status:' label and a 'Pending' value. Below this, there is a dark blue button labeled 'Edit Contract'.

Furthermore, one has other options to add more information to the contract and to make the electronic version of the contract available to both the CA and the EO. This can be done through the six options of the *show contract menu*.

The screenshot shows the 'Contract' page header with the role 'My Contract role is: Contract Manager'. The contract details are as follows:

Contract Title:	CT 2109/2019 - TENDER FOR THE SUPPLY OF RANGE OF MOTION SPLINTS
Contract Number:	4767631
Contracting Authority:	Ministry for Training and Development
Description:	CT 2109/2019 - TENDER FOR THE SUPPLY OF RANGE OF MOTION SPLINTS

On the right, there is a 'Hide Contract Menu' button and a dropdown menu with the following options:

- Contract Information
- Contract Information Data
- Contract Agreement
- Associated Contract Managers
- Restricted Area
- Auditing reports

The first option which is the *contract information* will show the initial page of the contract with the basic information covered above in this document. The *contract information data* contains two options to add additional information on the life cycle of the contract. One refers to payments and the other to milestones which are separated by two tabs. The CM needs to select the appropriate tab (either payments or milestones) and in both there are four selections; view, edit, delete and add payment or add milestone.

Payments and Milestones

Payments | Milestones

No results found.

View Edit Delete Add Payment

The first three are self-explanatory the fourth which is either add payment or add milestone depending on the selected tab will give the CM various fields to fill. For add payment;

Add/Edit Payment

*Payment Name:

*Payment Date:

*Payment Amount:

Payment Currency: EUR

Funding Agency:

*Payment Status: Approved ▼

Save Close

(Fig. 2)

The fields with a red * next to them are fields that are mandatory and must be filled. *Payment name* is a text field where one should enter a small description of the payment. The *payment date* can be added by selecting the date symbol next to it. The *payment amount* is a numerical field where one enters the amount of the payment. The *payment currency* cannot be changed and is set to EUR by default. The *funding agency* is also a text field where one must enter the entity effecting payment. Lastly the *payment status* is a drop-down menu with two options, either *approved* or *completed*. Once saved one can either view, edit or delete the entry, or just add another payment.

Payments | Milestones

Select	Payment Name	Payment Status
<input type="radio"/>	First phase payment	Approved

Displaying the 1 match. Page 1 of 1 << < > >>

View Edit Delete Add Payment

For add milestone;

(Fig. 3)

As with the add payment, the fields that have a red * next to them are mandatory fields. The *milestone title* is a text fields and one should enter a description of the milestone. For *milestone type* there is a drop-down menu with six options which are described below. One can also access this info box by selecting the information (i) icon next to the field.

Title	Description
Approval	For events such as the sign-off of a contract or project.
Engagement	For engagement milestones, such as a public hearing.
Assessment	For assessment and adjudication milestones, such as the meeting date of a committee.
Delivery	For delivery milestones, such as the date when a good or service should be provided.
Reporting	For reporting milestones, such as when key reports should be provided.
Financing	For events such as planned payments, or equity transfers in public private partnership projects.

The *due date* and *Met date* can be set by selecting the date symbol next to them. Finally, the *status* field is also a drop-down menu with three options to choose; *met*, *not met* and *partially met*.

Next from the *show contracts menu* is the *contract agreement*. Here the CA can upload the full signed scanned contract, in pdf format, and this will be available to both the CA and winning bidder (only). To add the contract just select *choose file* and select the contract file from the hard disk. The system will take some time to upload the file depending on it size.

To associate other CM's there is an option in the *show contracts menu* named *associate contracts manager* where the CM can associate anyone who has an active CA account in the ePPS as CM to the contract.

Associate/Disassociate Contract Managers
My Contract role is: Contract Manager

Contract: CT 2109/2019 - TENDER FOR THE SUPPLY OF RANGE OF MOTION SPLINTS (Status: Pending)
Show Contract Menu

CT 2109/2019 - TENDER FOR THE SUPPLY OF RANGE OF MOTION SPLINTS

First Name	Last Name	Role	Actions
Leonardo	Da Vinci	Contract Manager	Disassociate

Displaying the 1 match.
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Add Contract Manager

The last two options, *restricted area* and *auditing reports* have the same functionalities as the ones in the normal call for tenders.

Post Contract OCDS Mapping

Main Page (use Fig.1 as reference)

Contract Title	release.contracts	title	Contract Title
Contract Number	release.contracts	awardID	Contract Number
Description	release.contracts	description	Contract Description
Supplies/Services/works Code	release.contracts	items	Map all linked CPV codes
	release.contracts.items	id	CPV code
	release.contracts.items	description	Description of the CPV code
	release.contracts.items	classification	Repeat for each CPV code
	release.contracts.items.classification	scheme	"CPV"
	release.contracts.items.classification	id	CPV Code
	release.contracts.items.classification	description	Description of the CPV code
Contract Amount	release.contracts.value	amount	Contract Amount
Currency	release.contracts.value	currency	"EUR"
Contract Signature date	release.contracts	dateSigned	Contract Signature date
Contract	release.contracts.documents	id	Internal ID of the document
	release.contracts.documents	documentType	contractSigned
	release.contracts.documents	title	Contract
Contract Addendum	release.contracts.documents	url	Link to download the file
	release.contracts.documents	id	Internal ID of the document
	release.contracts.documents	documentType	contractSchedule
	release.contracts.documents	title	Contract Addendum
Completion Report	release.contracts.documents	url	Link to download the file
	release.contracts.documents	id	Internal ID of the document
	release.contracts.documents	documentType	completionCertificate
	release.contracts.documents	title	Completion Report
	release.contracts.documents	url	Link to download the file
Status	release.contracts	status	Status

The fields not listed are not part of the OCDS schema (Such as Modifications)

Payments (use Fig. 2 as reference)

Payment name			
Payment Date	release.contracts.implementation.transactions	date	Payment date
Payment Amount	release.contracts.implementation.transactions.value	amount	Payment amount
Payment Currency	release.contracts.implementation.transactions.value	currency	"EUR"
Funding Agency	release.contracts.implementation.transactions	payer	Organisation reference to the CA party

Payment Status

Fields in red are not part of the OCDS schema

Milestones (use Fig. 3 as reference)

Milestone title	release.contracts.implementation.milestones	title	Milestone title
Milestone type	release.contracts.implementation.milestones	type	Milestone type
Description	release.contracts.implementation.milestones	description	Description
Due date	release.contracts.implementation.milestones	dueDate	Due date
Met Date	release.contracts.implementation.milestones	dateMet	Date met
Status	release.contracts.implementation.milestones	status	Status