

Sell2Wales

Buyer User Guide – ESPD



Llywodraeth Cymru
Welsh Government

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Note - This document is intended as practical information and guidance for users of the ESPD module within Sell2Wales. It is assumed that users are procurement professionals with the knowledge and authority to carry out the relevant procedures. It is not a substitute for legal or policy advice, which users are advised to seek if they have any queries regarding the processes and procedures described.



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Facility of the European Union



Introduction

This guide is aimed at buyers who are creating and issuing electronic ESPD requests using the online ESPD module within Sell2Wales (S2W). This guide is not applicable to ESPDs that have been issued using any other method, such as Word document attachments, or via eTenderWales.

Best practice guidance on the supplier selection process, can be found in the Welsh Government's Supplier Selection Procurement Advice Note:

[Standard Selection Questionnaire](#)

The main features of the ESPD module are:

- It follows an easy-to-use process, allowing you to select questions which you consider proportionate and relevant to your procurement exercise for inclusion in your ESPD request.
- It enables you to create a “self-contained” ESPD request, meaning that you are able to include your selection criteria beside the relevant question within the ESPD itself. This means that you no longer need to include your selection criteria in the contract notice and can refer suppliers to the ESPD instead.
- It allows suppliers to complete ESPD responses electronically and re-use previous ESPD responses. Suppliers will then be able to submit this to you using the existing postbox functionality.
- It allows you to request relevant evidence or means of proof electronically.

Activating your organisation's ESPD account and User Access Levels

Initial activation of the buying organisation's ESPD account must be carried out by a Controller/Administrator within the organisation.

Initially, anyone with “Controller” access levels for your organisation can assign ESPD access. Controllers should select the “ESPD Module” link on the Notices panel of the Buyer Control Panel.



Buyer Control Panel

Welcome to your Buyer Control Panel **Anton**. Please *click* a link in one of the appropriate sections to access the area of the site you require.



NOTICES

- Create New Notice
- My Unpublished Notices
- Buyer Unpublished Notices
- My Published Notices
- Buyer Published Notices
- Quick Quotes
- Stage 2 Notices
- ESPD Module



ORGANISATION

- Millstream Associates Ltd (AA16166) - **Change your Organisation**
- Buyer Profile
- User List
- Document Library
- Agents
- Reports



SUPPLIER SEARCH

- Supplier Finder
- Search by Details
- Search by Category



HELP & RESOURCES

- NPS Contracts, Framework & Guidance
- User Guides
- FAQs
- Contact Us
- Site Mailer
- eCertis

The first time the Controller accesses the module this they will be asked to activate their organisation's ESPD account, which is done by selecting "Activate".

Buyer ESPD Activation

Welcome to you European Single Procurement Document (ESPD) portal. To continue to your control panel you must first activate your account.

We are asking you to activate a separate ESPD portal account so that the details held in the ESPD portal are separate from those held in main portal. The details of your company and any user with 'Controller' access to your company in the main portal will be copied across to create the ESPD portal account. This will allow you to customise the details for your company in relation to ESPD without it changing the details of your company in the main portal.

To setup your ESPD account, please click on the button below.

Activate



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The Controller will be taken to the ESPD Control Panel, from where they can add other users to the ESPD account.

Users can be managed from the “Manage Users” option on the ESPD Control Panel.

Sell2Wales Get in touch: 0800 222 9003
Opening hours: 08:30 - 17:00

Portal Control Panel ESPD Control Panel Profile Users Requests Log out

Manage Your ESPD Profile

Welcome to your European Single Procurement Document (ESPD) control panel. From here you will be able to create ESPD requests, manage your ESPD profile and manage users

ESPD Profile

Organisation Details

User Management

Manage Users

ESPD Requests

View ESPD Requests
Create ESPD Requests

To add a user to the ESPD Account a Controller selects “Add User”.

Buyer ESPD Users

The table below lists the users that have access to this Buyer ESPD account. From here you can add new users, edit or delete current users (depending on permissions).

Add User

Show 10 entries Search:

Full Name	Permissions
Anton Kossmann (Anton@millstream.eu)	Administrator

Showing 1 to 1 of 1 entries Previous **1** Next

The Controller will then be presented with a list of all users aligned to their buying organisation on Sell2Wales and can grant each one ESPD access by selecting the user’s name.



They will then be asked to allocate ESPD access levels to the new user. The options available are:

Administrator – allows a user to create and amend ESPD requests and to allocate ESPD access to other users.

Editor - allows a user to create and amend ESPD requests.

Viewer - allows a user to view ESPD requests.

The Controller should select the relevant access level for that user and then select “Add User”.

Select Permissions

Please select the permissions for Alan Brown.

Permissions

Editor

Cancel Add User

The new user will then see the “ESPD Module” link in their buyer control panel.

Accessing the ESPD module

To access the ESPD module, visit the [Buyer Control Panel](#) and select ‘ESPD Module’ under Notices. This will take you to your ESPD module, viewable only to S2W users within your organisation.



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- Buyer Published Notices
- Quick Quotes
- Stage 2 Notices
- ESPD Module**



ORGANISATION

- Millstream SQL Testing (AA66827) - **Change your Organisation**
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- Site Mailer
- eCertis

The ESPD Control Panel will allow you to Create / Edit your ESPD requests and Manage User access.



Get in touch: 0800 222 9003
Opening hours: 08:30 - 17:00

Portal Control Panel

ESPD Control Panel

Profile

Users

Requests

Log out

Manage Your ESPD Profile

Welcome to your European Single Procurement Document (ESPD) control panel. From here you will be able to create ESPD requests, manage your ESPD profile and manage users

ESPD Profile

Organisation Details

User Management

Manage Users

ESPD Requests

View ESPD Requests
Create ESPD Requests



On the control panel you will see the following information:

Manage Users

This displays all users who currently have the ability to create / edit ESPD requests for your organisation. Controllers can add new users through this screen, and edit the details of any current users. Users who are not registered on the ESPD Module will not be able to see the link to the ESPD Module on their Buyer Control Panel.

View Requests

This contains a list of all ESPD requests that have been created and published through your organisation's profile. The list indicates who created the ESPD, and whether each particular ESPD has been linked to a Contract Notice, and is locked, or is still being edited.

There is also a shortcut button to create a new ESPD request.

The screenshot shows the 'Buyer ESPD Requests' interface. At the top, there is a navigation bar with the Sell2Wales logo and contact information (0800 222 9003, 08:30 - 17:00). Below the navigation bar, there are links for 'Portal Control Panel', 'ESPD Control Panel', 'Profile', 'Users', 'Requests', and 'Log out'. The main heading is 'Buyer ESPD Requests'. Below the heading, there is a text block explaining that the table lists ESPD requests created for the Authority, and users can view or edit existing requests or create new ones. A red button labeled 'Create Request' is visible. Below the button, there is a 'Show 10 entries' dropdown and a search box. The table below has columns for 'Title', 'Created Date', 'Created By', and 'Notice'. The first entry is 'Supply of Fruit & Veg', created on 17/04/2018 by Anton Kossmann. At the bottom, there is a 'Showing 1 to 1 of 1 entries' message and pagination controls (Previous, 1, Next).

Title	Created Date	Created By	Notice
Supply of Fruit & Veg	17/04/2018	Anton Kossmann	



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Creating an ESPD Request

N.B. You must ensure the information provided in the ESPD matches any information you have provided in the Contract Notice.

Creating a new ESPD involves completing 3 main steps, each divided into relevant sections.

Step 1: Procurement Details

The details step is broken down in to 3 sections. Clicking **NEXT** saves the current section and progresses you to the next section.

Authority Details

This will be autopopulated based on the Authority you logged-in to.

Publication Details

This information does not need to be completed when initially creating your ESPD document; it should be filled in once your contract notice has been published on OJEU. You should receive an email alerting you to this.

Procurement Procedure

The *Title* and *Short Description* fields need to be completed with the relevant information. A procedure type also needs to be selected from the drop down list. Information on Lots (titles only) should be entered at this stage.



Step 1: Procurement Details

Supply of Fruit & Veg

Authority Details	Publication Details	Procurement Procedure
-------------------	---------------------	------------------------------

Procurement Procedure

Please enter the title and short description of the procurement procedure and, if applicable, insert your internal reference for the procurement exercise within the 'file reference number' field.

* indicates a required field.

Title *

Short Description *

Procedure Type

File Reference Number ?

Number of LOTS

Please provide a brief title for each of your lots

LOT 1

LOT 2

Prev Save and Exit Next



Step 2: Procurement Details

Step 2 is broken down into 4 sections, each with its own subsection. Clicking **NEXT** saves the current section and progresses you to the next question.

Procedure

CPV Codes – Use the search bar to find CPV codes that match the Contract you're issuing. You can select multiple CPV codes from the results list, then click **Add** to link them to your document.

Information about Lots – When completing this screen you must ensure that the information is consistent with any information about lots have provided in the Contract Notice.

Bidder Information

The questions in this section are all selected by default, but you are able to deselect any questions that you do not wish to include in your ESPD request.

Bidding as a Group/Subcontractor Information

The ESPD system only allows for one ESPD document to be submitted per bidder. If the bidder is required to submit ESPD responses on behalf of other organisations - such as sub-contractors, consortia members or organisations on which they will rely to carry out the contract – they are instructed to download the ESPD file in Excel format and ask their partner organisations to complete the relevant sections and return it to them offline. The bidder should then attach the ESPD responses from their partners as additional documents within their postbox response, which will include their own ESPD response in electronic format.

Exclusion Criteria

The questions in this section are all selected by default, but you are able to deselect any questions that you do not wish to include in your ESPD request. It is strongly recommended to acquaint yourself with the guidance relating to exclusion criteria available from Crown Commercial Services before completing this section.

[Standard Selection Questionnaire](#)



Create ESPD

Step 2: Criteria Selection

Supply of Fruit & Veg

Procedure

Bidder Information

Exclusion

Selection

Bidder Information

Bidder Information

Additional information about the bidder.

[2A1] SME

Are you a Small, Medium or Micro Enterprise (SME)?

[2A2] Supported Business

Relevant classifications (state whether you fall within one of these, and if so which one)

- a) Voluntary Community Social Enterprise (VCSE)
- b) Sheltered Workshop
- c) Public service mutual

[2A3] Form of participation

Are you bidding as the lead contact for a group of economic operators?

[2A4] Subcontracting

Are you or, if applicable, the group of economic operators proposing to use sub-contractors?

Selection Criteria

The questions in this section are defaulted to not selected, so you will need to actively select any that you consider relevant to your procurement exercise.

Complete each subsection selecting the questions you wish to include in your ESPD request.

Where relevant, you are able to include selection criteria alongside the questions you have chosen to include in your ESPD request, so that any bidders can understand what minimum requirements or criteria required specific to your procurement exercise are.



Step 3: Finish

The **Summary** section provides an overview of all information selected by you in the process of creating your ESPD.

Create ESPD

Step 3: FinishSupply of Fruit & Veg

Previous Save and Exit Export XML Export PDF Export Word

You can now review the ESPD request you have created. If you want to edit your ESPD request, clicking on the "Previous" button will take you back through the ESPD creation screens.

To save a copy of your ESPD request offline, click on one of the export options to download.

Once you have finalised your ESPD request, click "Save and Exit" and you will be presented with two options:

"Save Only" will allow you to return to your ESPD request and make further changes. You will not be able to link your ESPD request to a contract notice.

"Save and Lock" will lock the ESPD request, so that no further amendments can be made. Once your ESPD request is locked, it will be available to be linked to the associated contract notice.

Summary Concluding Statements

Authority Details

Official Name: Millstream SQL Testing

Country: United Kingdom (GB)

Notice Details

Procurement Procedure

Title: Supply of Fruit & Veg

Short Description: Supply of Fruit and Veg to the Farmers Market

File Reference Number:

Criteria

Procedure - Information about Lots

[C63] Requirements on lots
Please provide further information about the lots on this contract.

Procedure - CPV Codes

[C64] Procurement Procedure CPV
Procurement Procedure CPV

Selected CPVs: - 03222100, 03222110, 03222118, 03221000, 03221100, 03221110

Bidder Information - Bidder Information

[2A1] SME



The **Concluding Statements** section highlights the declaration that all suppliers will have to Electronically Sign upon completing an ESPD response.

Create ESPD

Step 3: FinishSupply of Fruit & Veg

PreviousSave and ExitExport XMLExport PDFExport Word

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SummaryConcluding Statements

Concluding statements

The undersigned formally declare that the information stated is accurate and correct and that it has been set out in full awareness of the consequences of serious misrepresentation.

The undersigned formally declare to be able, upon request and without delay, to provide the certificates and other forms of documentary evidence referred to, except where the contracting authority or contracting entity has the possibility of obtaining the supporting documentation concerned directly by accessing a national database in any Member State that is available free of charge. On condition that the economic operator has provided the necessary information (web address, issuing authority or body, precise reference of the documentation) allowing the contracting authority or contracting entity to do so. Where required, this must be accompanied by the relevant consent to such access.

The undersigned formally consent to the contracting authority, gaining access to documents supporting the information, which has been provided in this European Single Procurement Document response for the purposes of this procurement exercise.

At this point you may export your ESPD Document to one of *MS Word*, *XML*, or *PDF* formats.

Once you have completed your ESPD, you may either save it for editing at a later date, or **Save & Lock** it, which will then allow you to add it to a Contract Notice.



Linking an ESPD request to a Contract Notice

An ESPD request can be linked to a Contract Notice during the notice creation stage. When you reach the *Additional Options* question, the option exists to include an ESPD (Which has to be linked to an active Postbox). Select the ESPD checkbox, and then select NEXT to move screen

Additional Notice Options

Select any additional options that you would like for this notice.

Go to question: Additional Options Go

Noted Interest

Indicate that you are administrating this notice on this website and want interested suppliers to record an interest in your notice to obtain further information.

Other Additional Options

Noted interest must be selected if you wish to use these additional options.

Additional Documents
Attach any other supporting documentation for instant download by bidders.

Questions and Answers
Respond only once to questions, keeping all current and newly interested suppliers up to date in real-time.

Postbox
eTendering - receive and manage tender submissions in a secure environment.

ESPD
Use the ESPD module integrated within the portal.

Next Save Cancel

Ticking these checkboxes adds the option to link your ESPD request to the Notice. You can select from the drop down list on the 'ESPD' Question and click **Add**. (Please note that only ESPD's that have been Saved & Locked are visible for selection).

If you do not have a pre-prepared ESPD, you can choose to create an ESPD from here.



ESPD

Please select the relevant ESPD from the list below and click add to link it to your contract notice.

If your ESPD is not showing below, it may be because you have not clicked 'Save and Lock' in the ESPD module

Go to question: ESPD

Go

Select your ESPD:

Next

Select the relevant ESPD Request and click **Add**.

Save

Supply of Fruit & Veg

Add

Generate New ESPD

Cancel

Selected ESPD: Supply of Fruit & Veg

[Download File](#) | [Remove ESPD](#)

Once added, you can now continue and complete your Contract Notice.

Editing an ESPD Request

An ESPD can be edited up until it has been attached to a Contract Notice. To edit an ESPD go to the "View Requests" page through the ESPD Control Panel. Click on the Title of the ESPD in question, and you will be able to unlock and edit as required.

Once an ESPD has been attached to a Contract Notice, it may no longer be edited.

If errors are discovered in an ESPD once it has been linked to a Contract Notice, users are required to issue an Amendment notice through the S2W website. If the ESPD has several, or serious errors, it is recommended that you start the procurement exercise again.



Opening ESPD Responses

Once the Notice deadline has passed, you will be able to access the ESPD responses through the Postbox. A PDF version of the ESPD response is automatically generated by the system, but clicking on Open ESPD will display the full Question and Answer set, and provide you with more options for downloading to various file formats.

Postbox View Details

Details of the selected response are shown below. You can download and save the attached documents by clicking on the appropriate document title. To download the entire response into a zip file [click](#) on the relevant link.

Response Details

Response ID: 73465
Title: Fruities
Created: 16/04/2018
Received: 16/04/2018 16:44
Download: [Download postbox response \(Zip File\)](#)

Contact Details

Organisation: Millstream Associates
Contact: Anton Kossmann
Department:
Address: 10 Queens Road
Town: Aberdeen
Postal Code: AB15 4ZT
Country: United Kingdom (GB)
Telephone: 01224 650 763
Fax:
Email Address: Anton@millstream.eu

ESPD Response

ESPD Response ID: 99582235-b8e3-4f6f-bed7-f77cbef65499
Issued Date: 16/04/2018
Issued By: Anton Kossmann

[Open ESPD](#)

Documents

Document Title	Description	Size
ESPD-Response-99582235-b8e3-4f6f-bed7-f77cbef65499.pdf	ESPD Response - Test Welsh Language	220.01 KB

