Administration Intelligence AG

USING THE **AI BIDDING**COCKPIT: **QUICK REFERENCE GUIDE** FOR BIDDERS TO THE EPO

BIDDINGCOCKPIT

Status on: 29.10.2019

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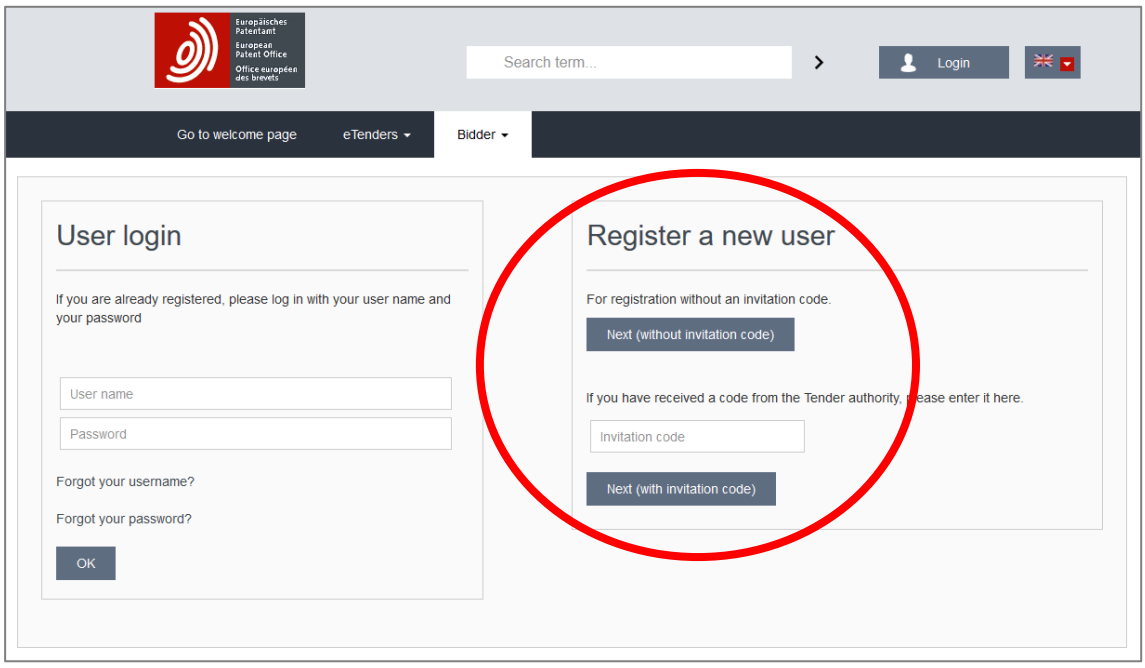
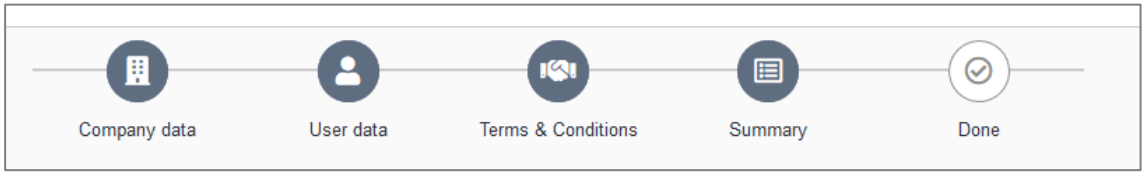
1. How to create and submit a bid

1.1. Registering on the platform

To view the tender documents, you first have to register with the EPO as a bidder. If EPO Central Procurement sent you an invitation code, you can use it when registering. If not, click the button NEXT (WITHOUT INVITATION CODE).



You then start a registration process. You will need to complete these five steps in order to be able to register on the AI TENDERINGPLATFORM and to take part in the tenders of the European Patent Office:



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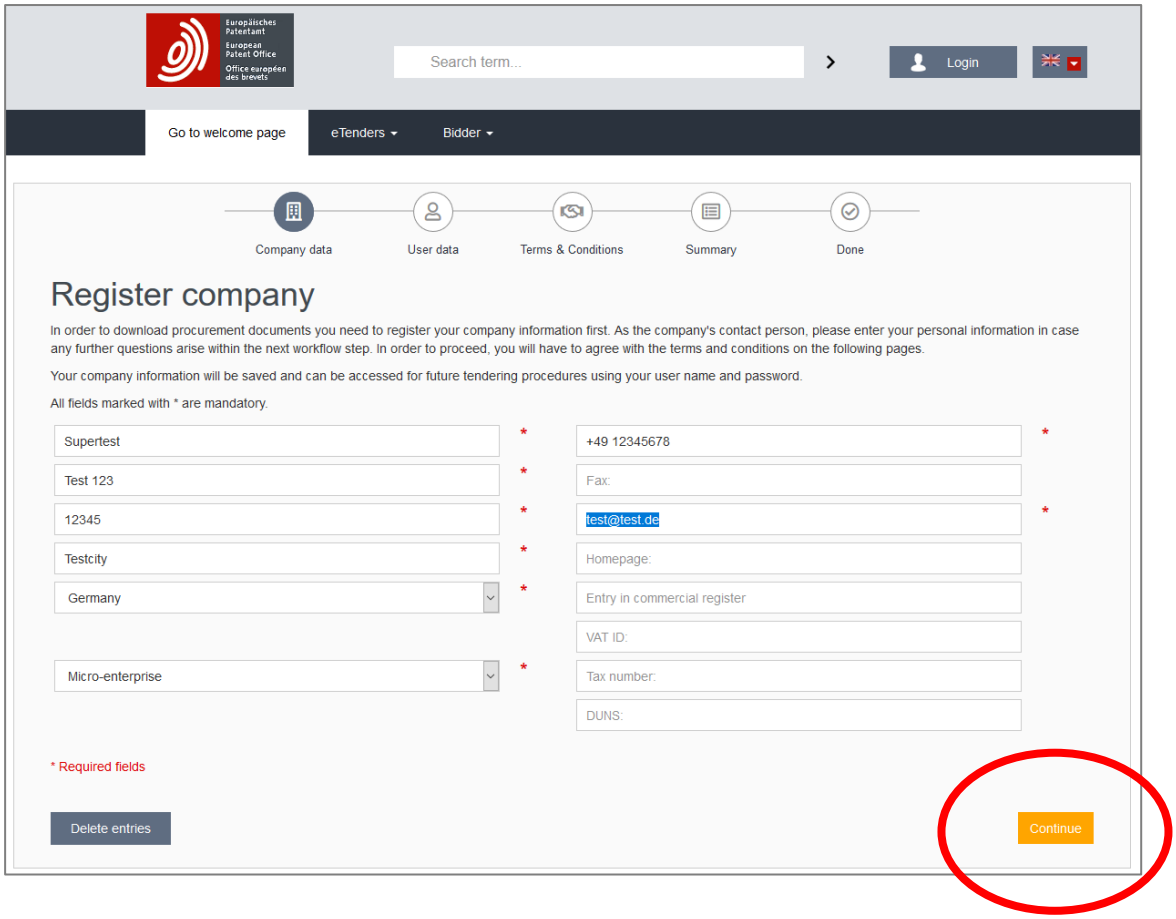
Now fill in all the mandatory fields and click the button CONTINUE.



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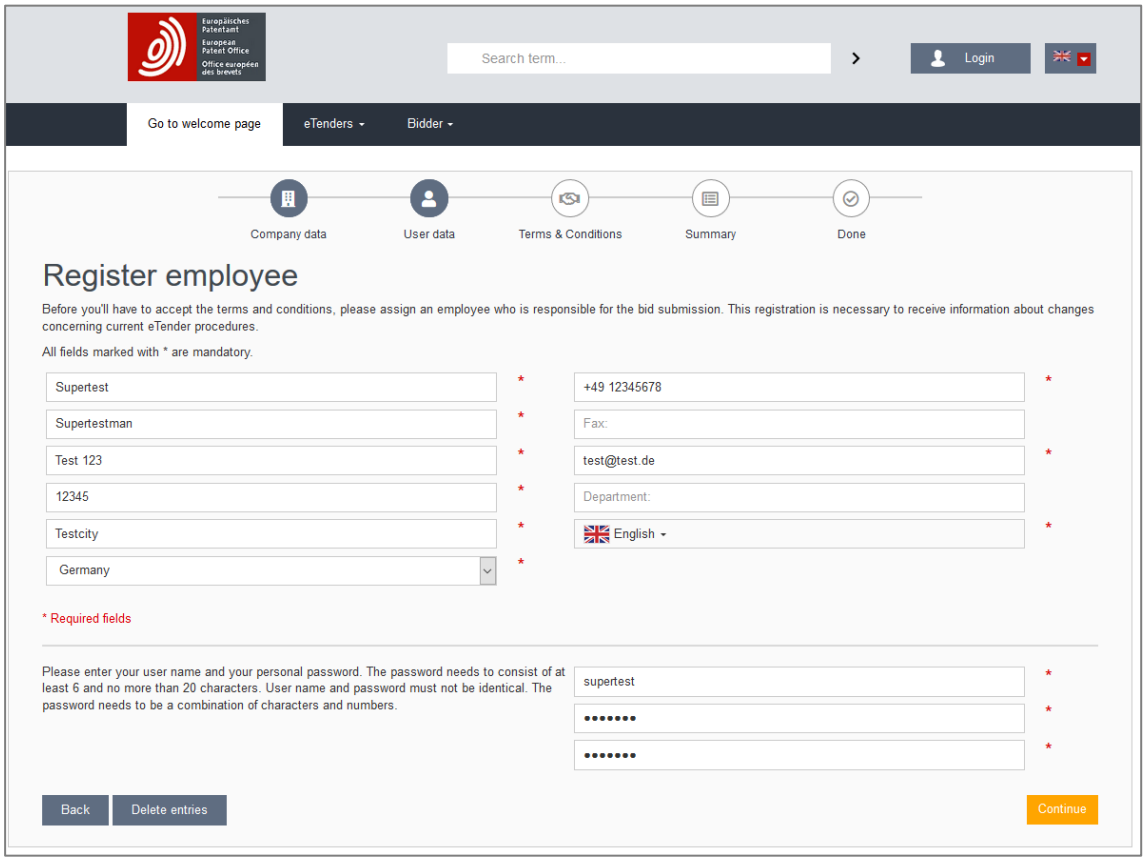
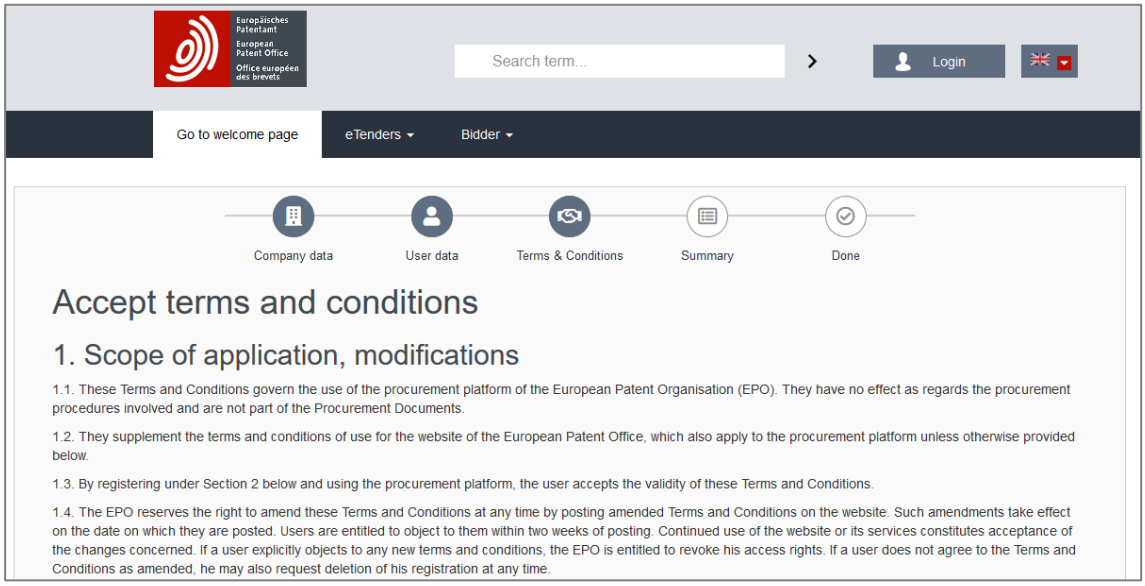
Then complete the rest of the registration process – register an employee and accept the terms and conditions.





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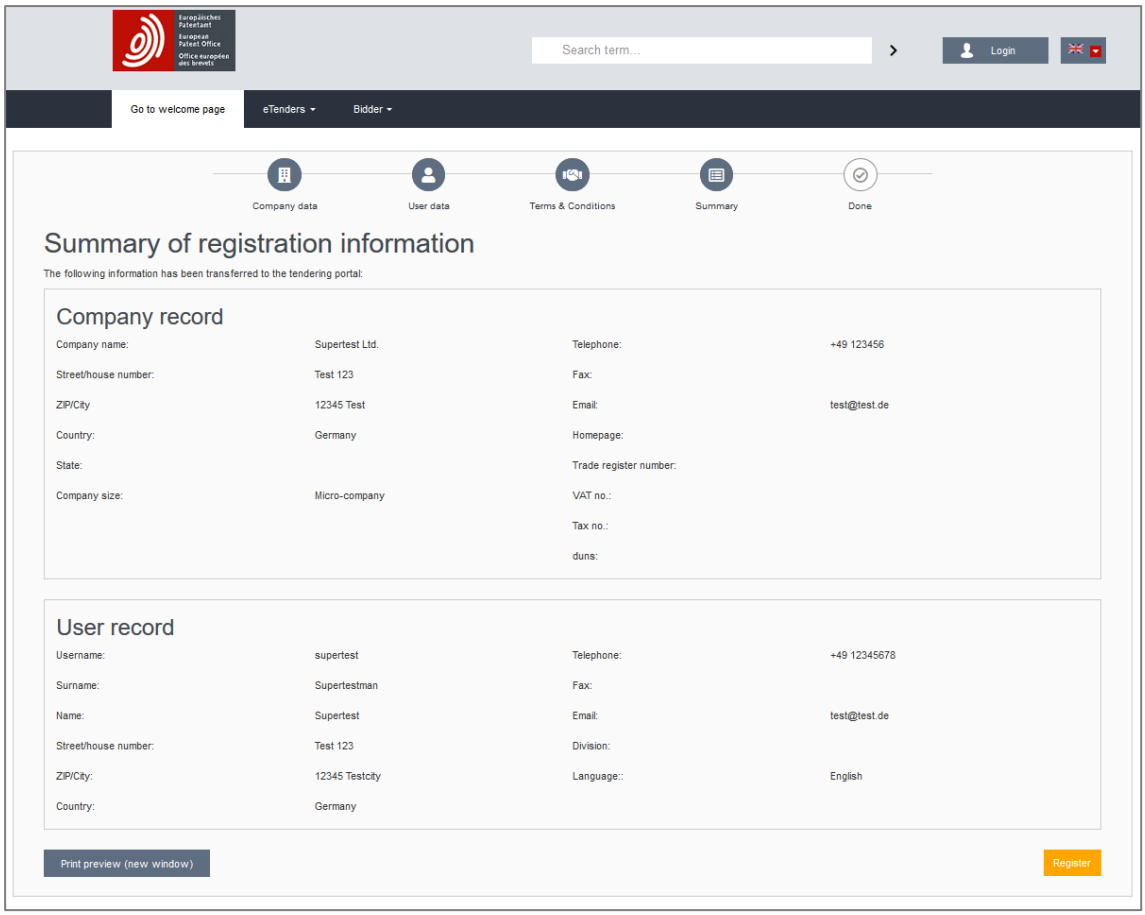
Please check the entries you have made within the last step of the registration. This concludes the registration procedure and the registered employee can now take part in EPO tender procedures and submit bids.



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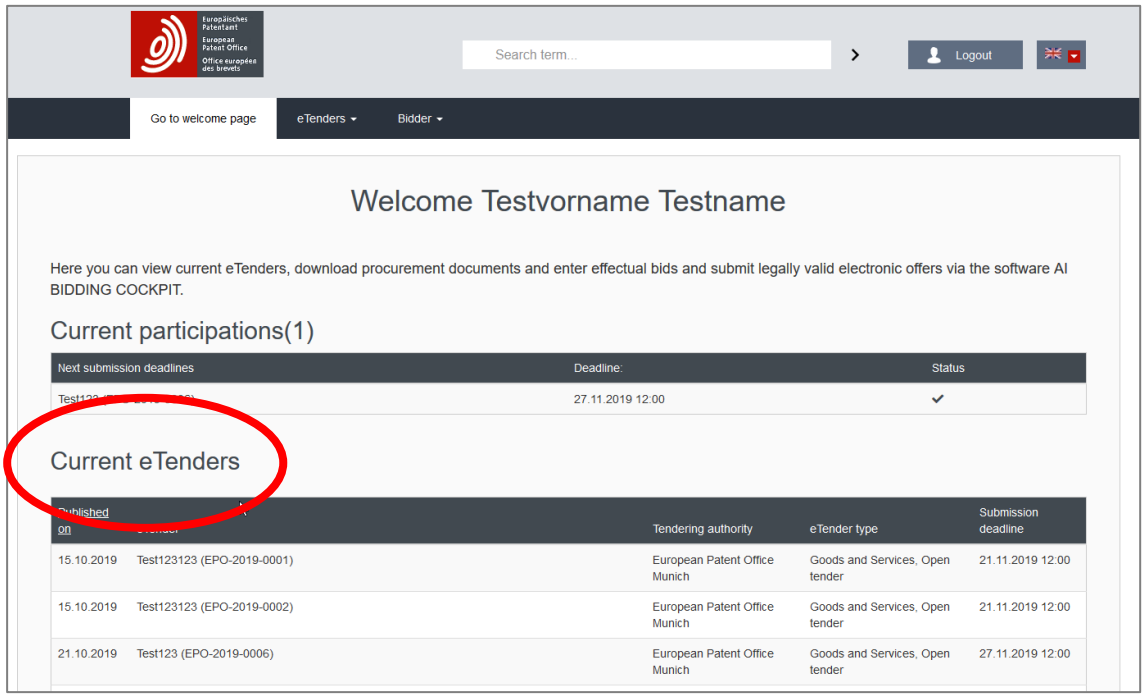
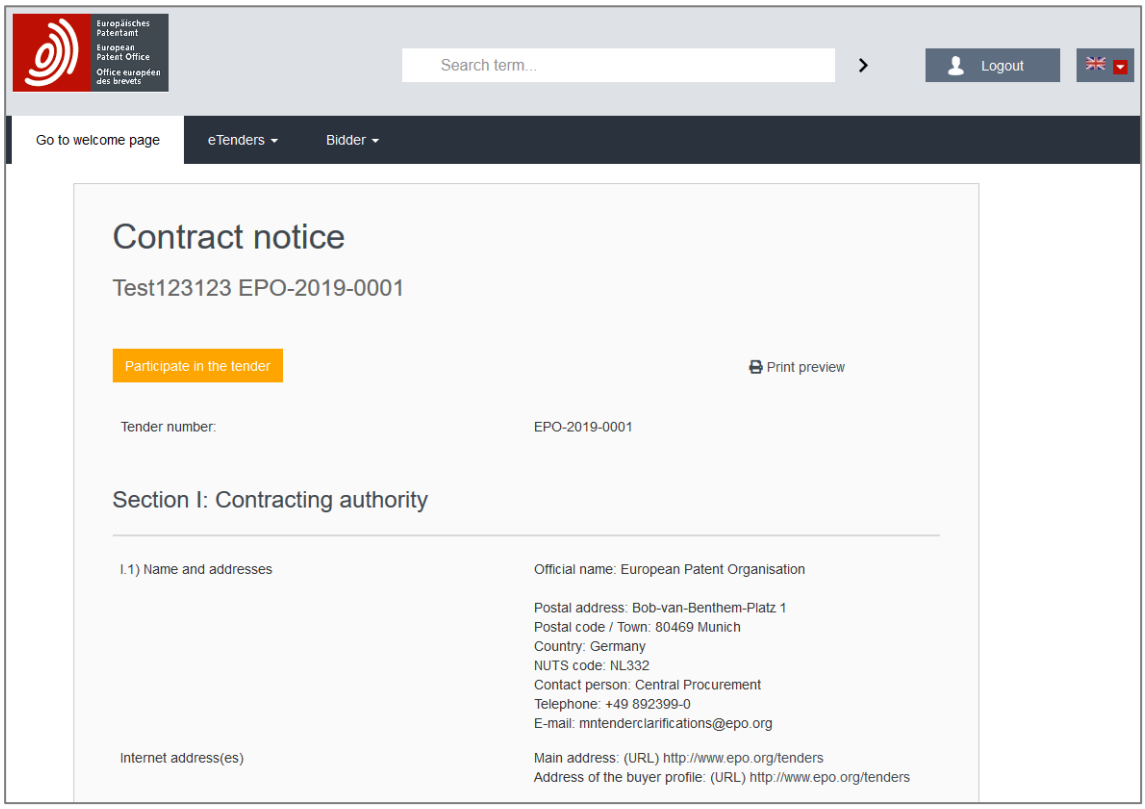
1.2. Launching the bidding tool

Now that you have completed the registration process, you can request the tender documents. The public invitations to tender running at any given time are displayed in the section CURRENT ETENDERS.



Click a procedure in the table to open the relevant contract notice.



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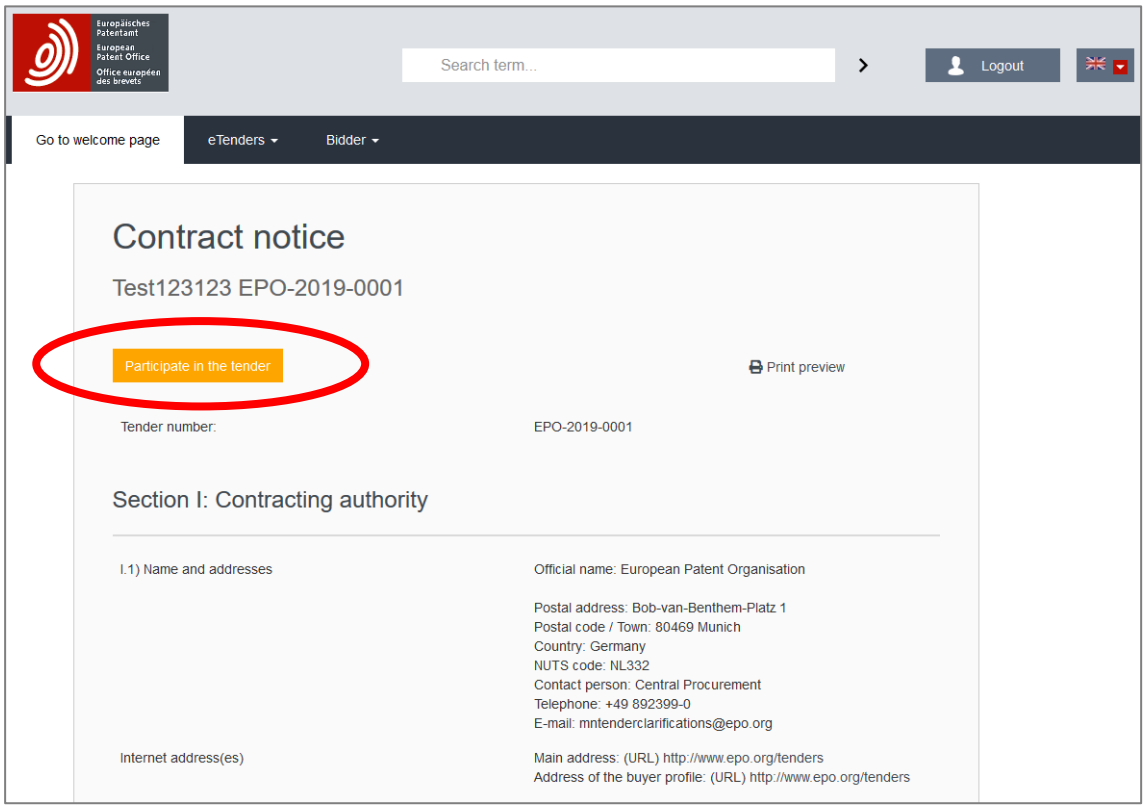
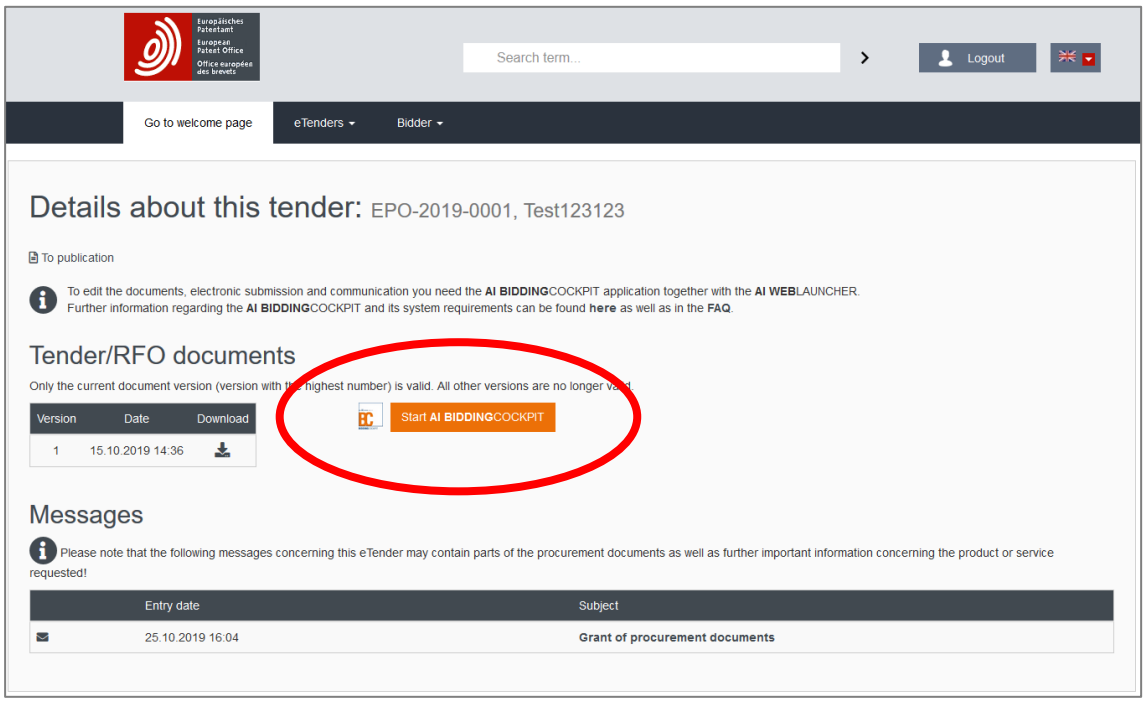
Then click PARTICIPATE IN THE TENDER.



And then click START **AI BIDDING**COCKPIT to open the corresponding tender within the AI bidding tool.



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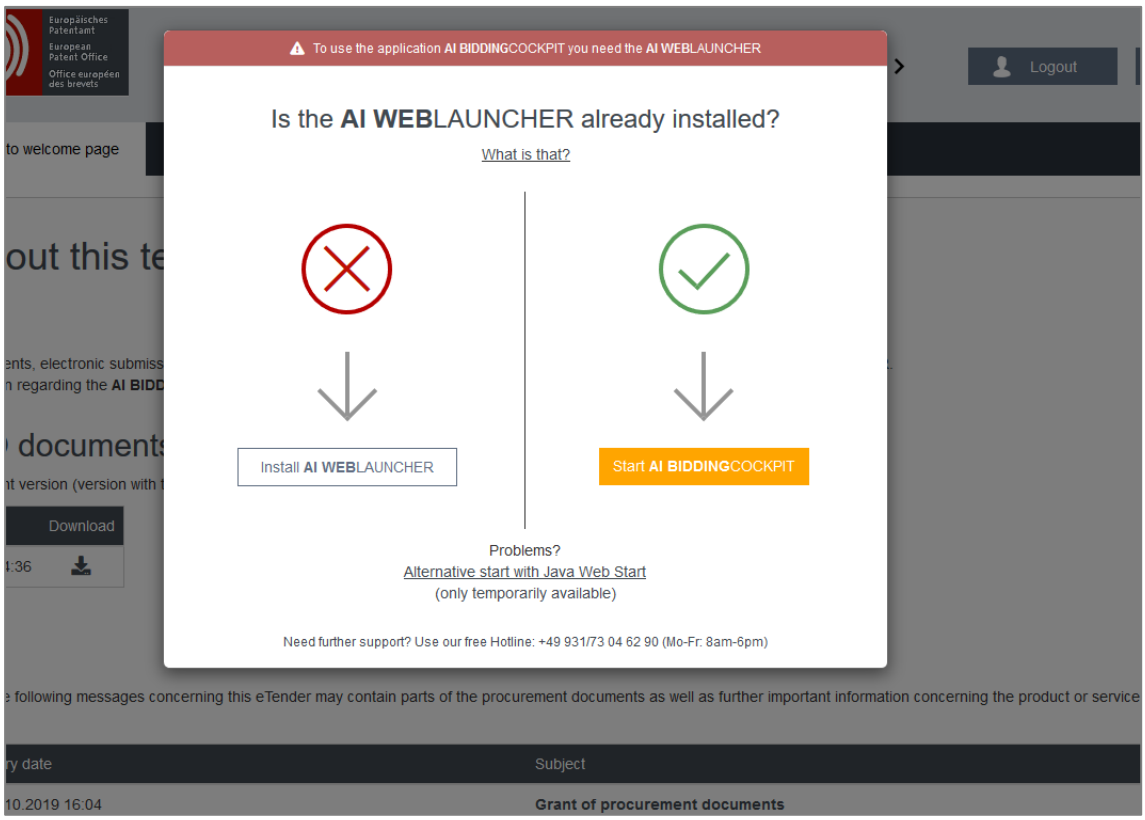
Please note that you may have to install the **AI WEB**LAUNCHER before you can start using the tool. If this is the case, follow the link https://www.bietercockpit.de/install.html to find out which version of the **AI WEB**LAUNCHER you need to install for your system. The **AI BIDDING**COCKPIT may still also be started with Java Webstart for a limited period of time.



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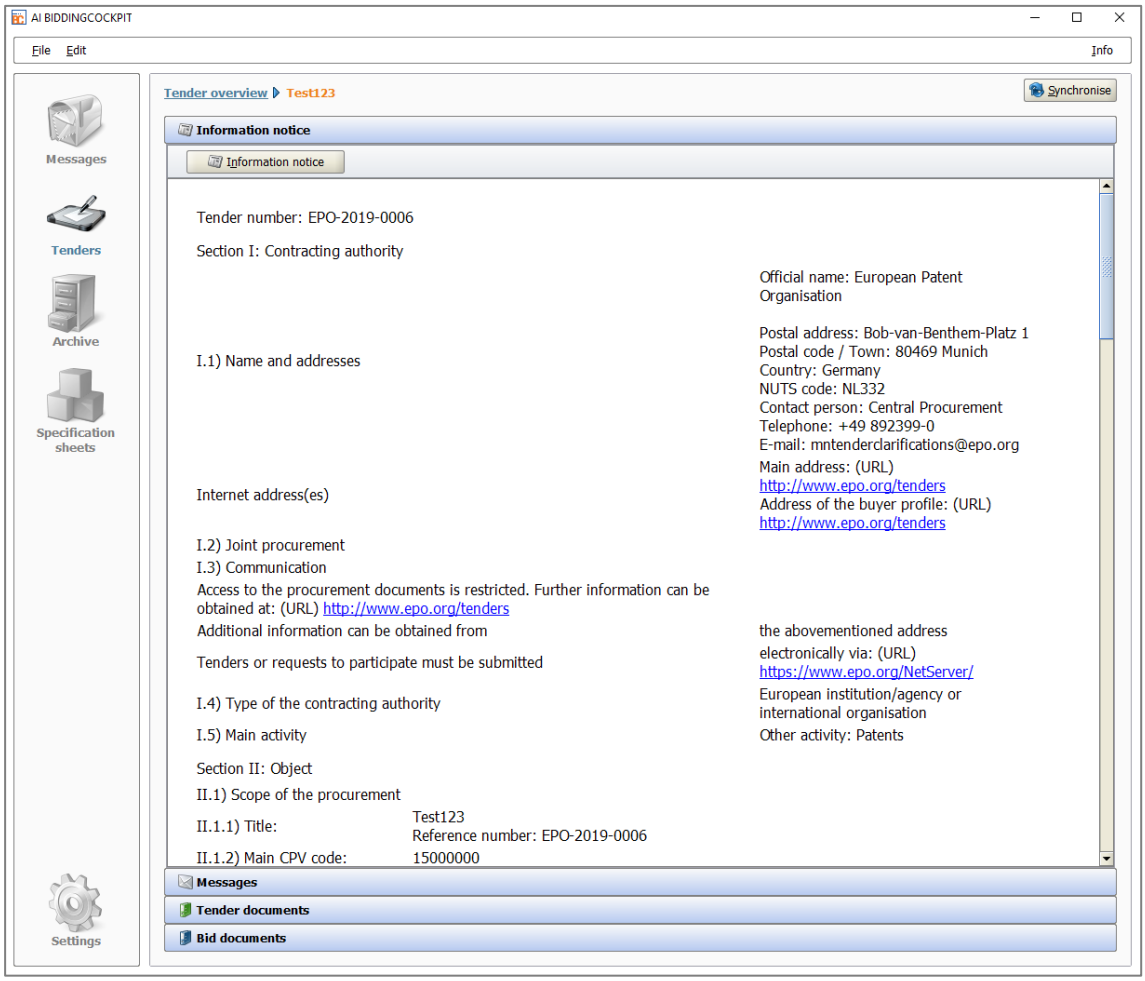
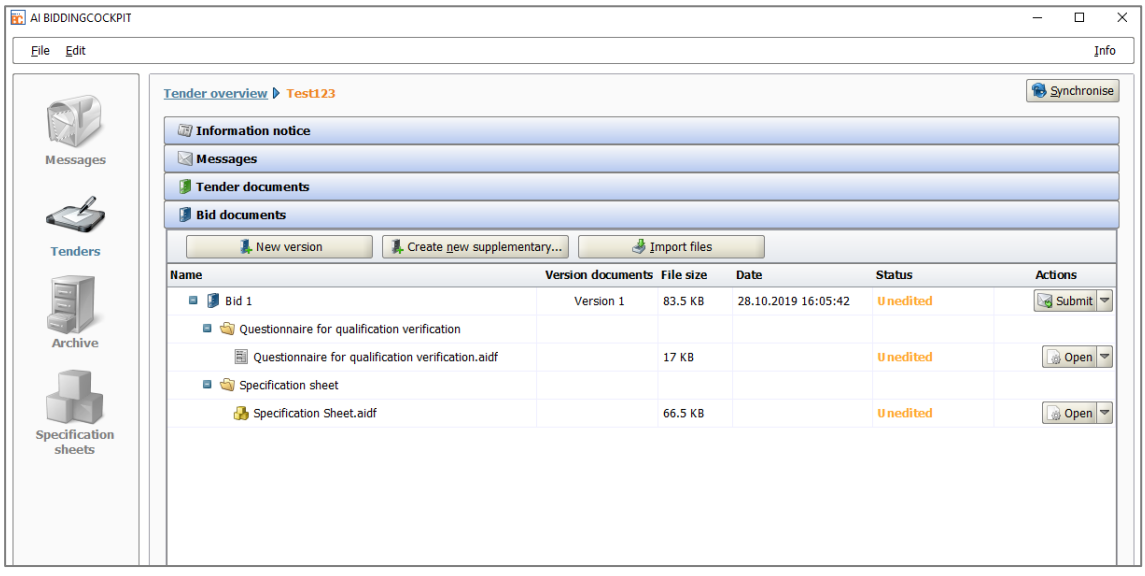
You can then open the **AI BIDDING**COCKPIT, using the user name and password you chose when registering. If you open the **AI BIDDING**COCKPIT in connection with a particular invitation to tender, that invitation to tender will be the first thing you see when the application is launched.





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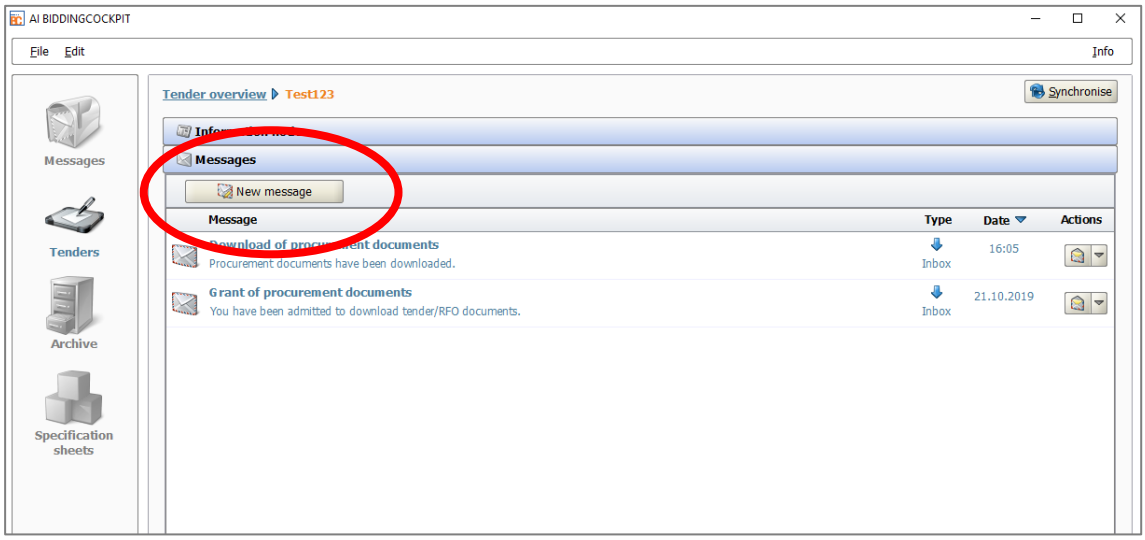
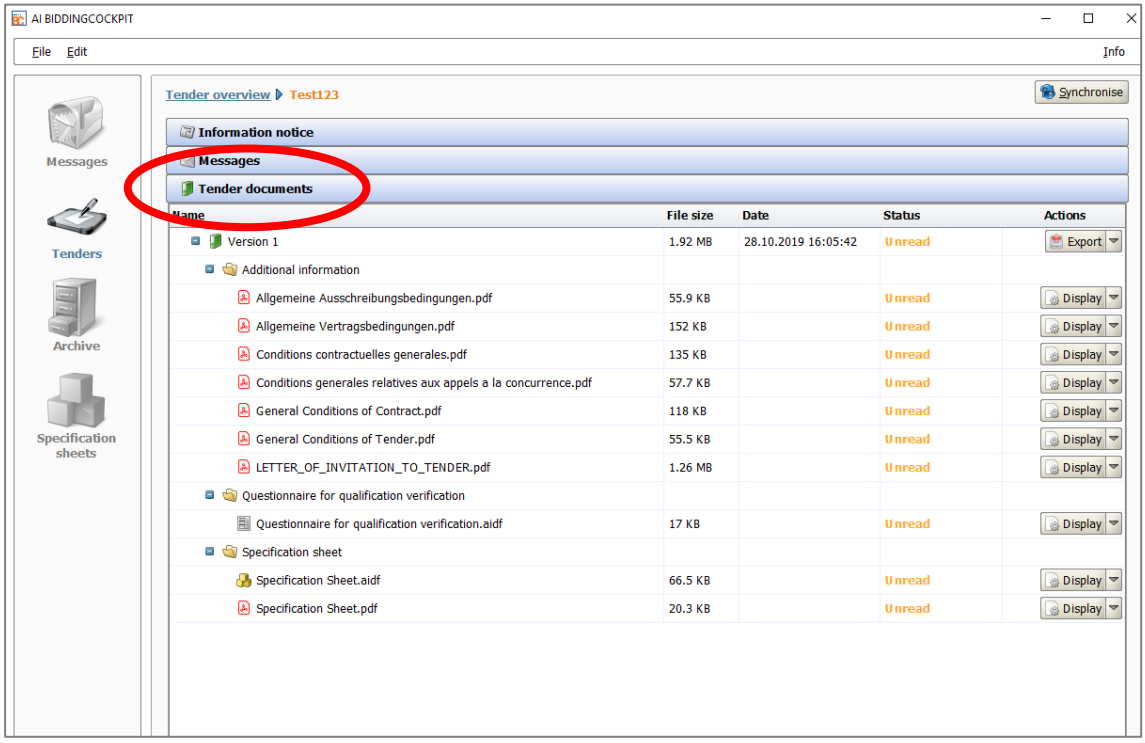
1.3. Viewing/sending messages relating to the tender procedure

All messages relating to the tender procedure in question are displayed under MESSAGES. This is also where you can send messages to EPO Central Procurement. Just click the button NEW MESSAGE.



1.4. Viewing the tender documents

The tender documents are displayed when you click TENDER DOCUMENTS. Double-click individual documents to open them.



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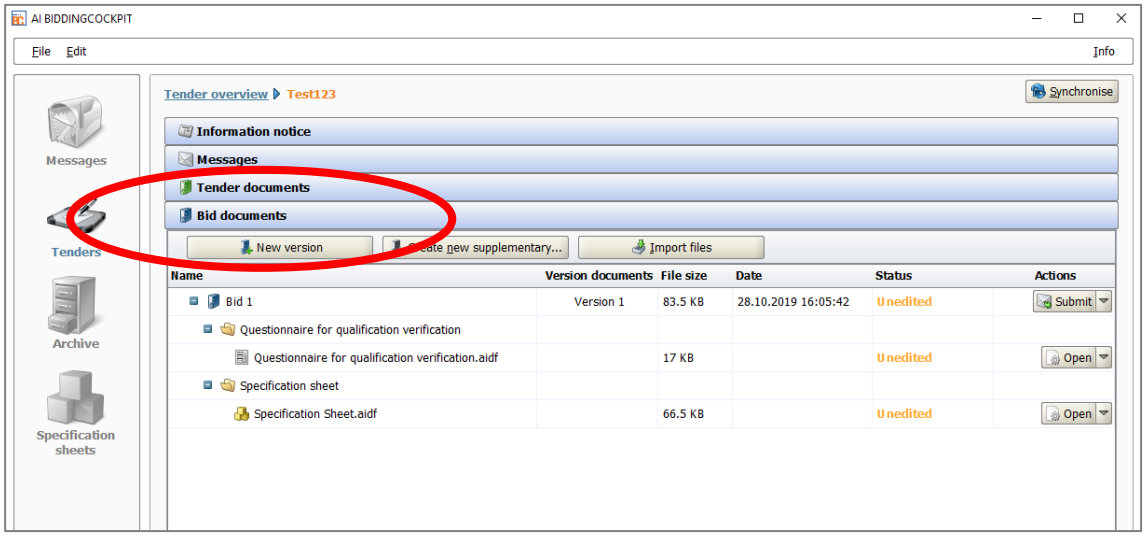
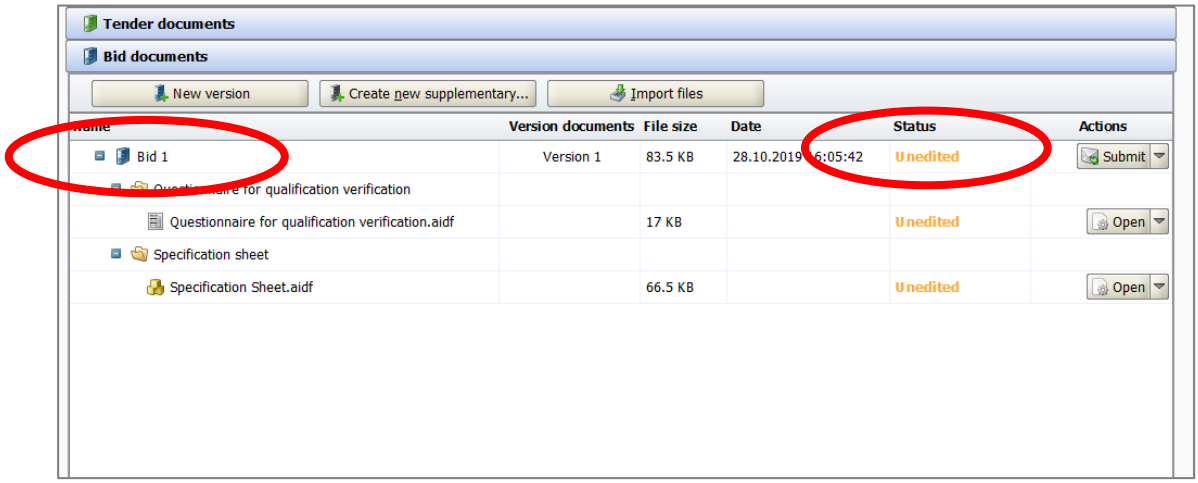
1.5. Creating bids

1.5.1. Producing bid documents

To create a bid, click BID DOCUMENTS.



A first version of the bid will be created automatically the first time you open the invitation to tender.



The first time you open the BID DOCUMENTS section, all forms have the status UNEDITED. When you open the forms, their status changes to READ or EDITED and once all the mandatory fields have been filled in, their status changes to COMPLETED.

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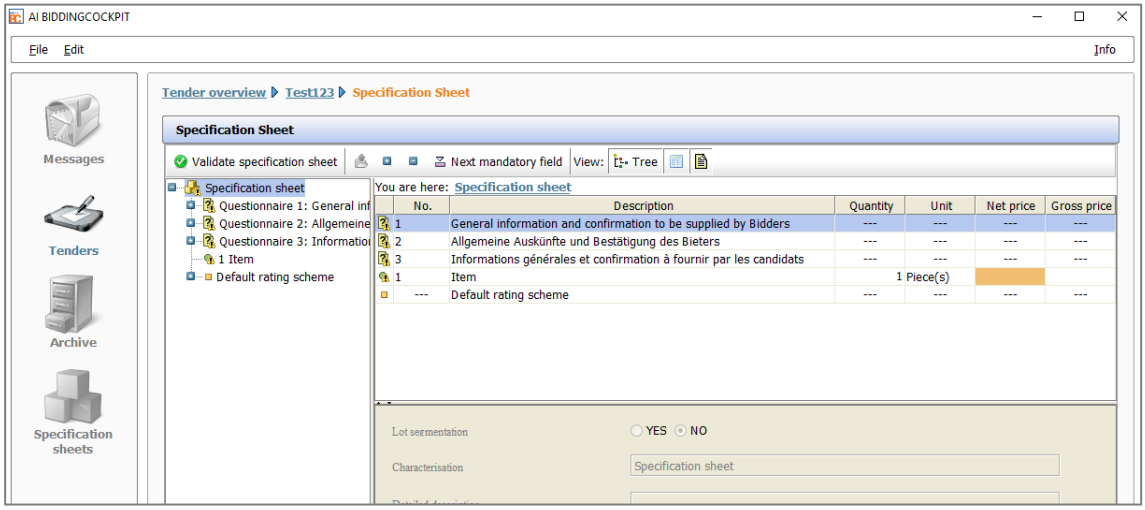
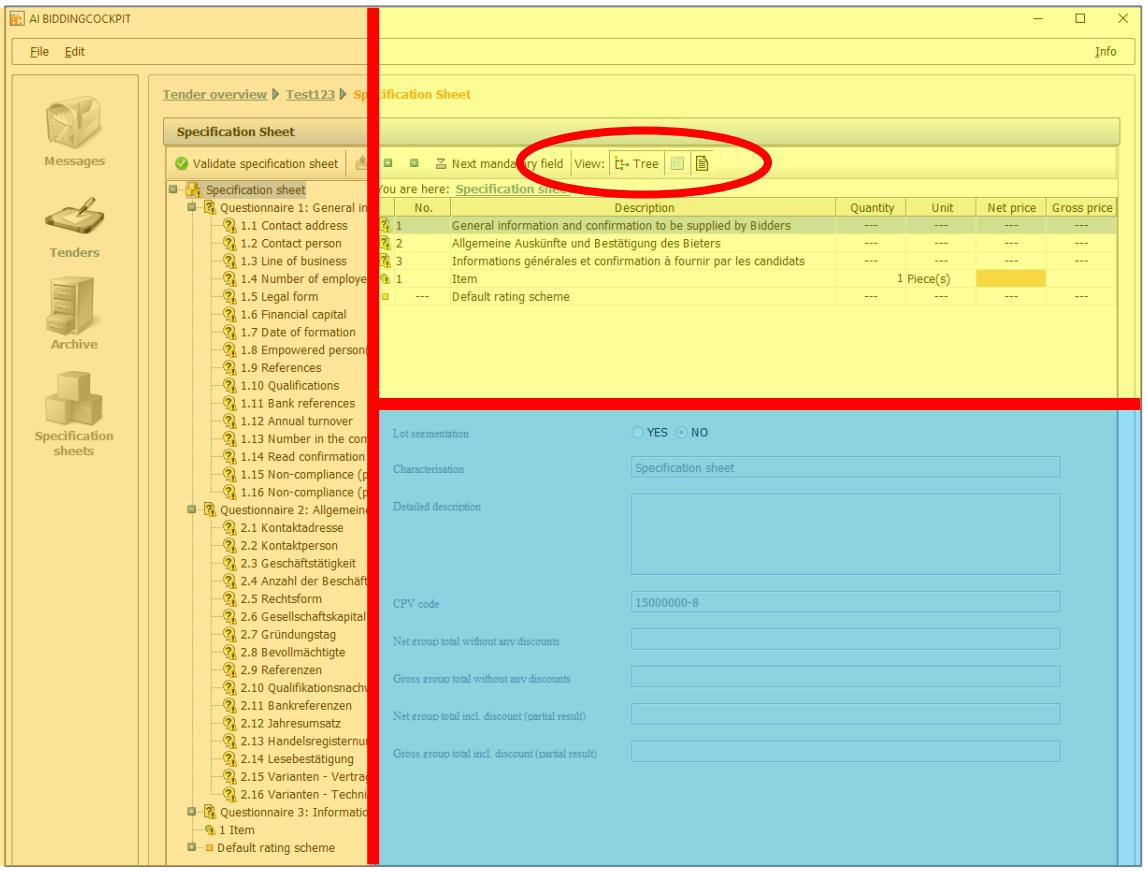
1.6. Specification sheet

Open the specification sheet by double-clicking SPECIFICATION SHEET or by clicking OPEN (under ACTIONS).



The specification sheet window has its own symbol bar and three distinct areas: an overview of the structure on the left, a table view on the upper right-hand side and a form area below that.



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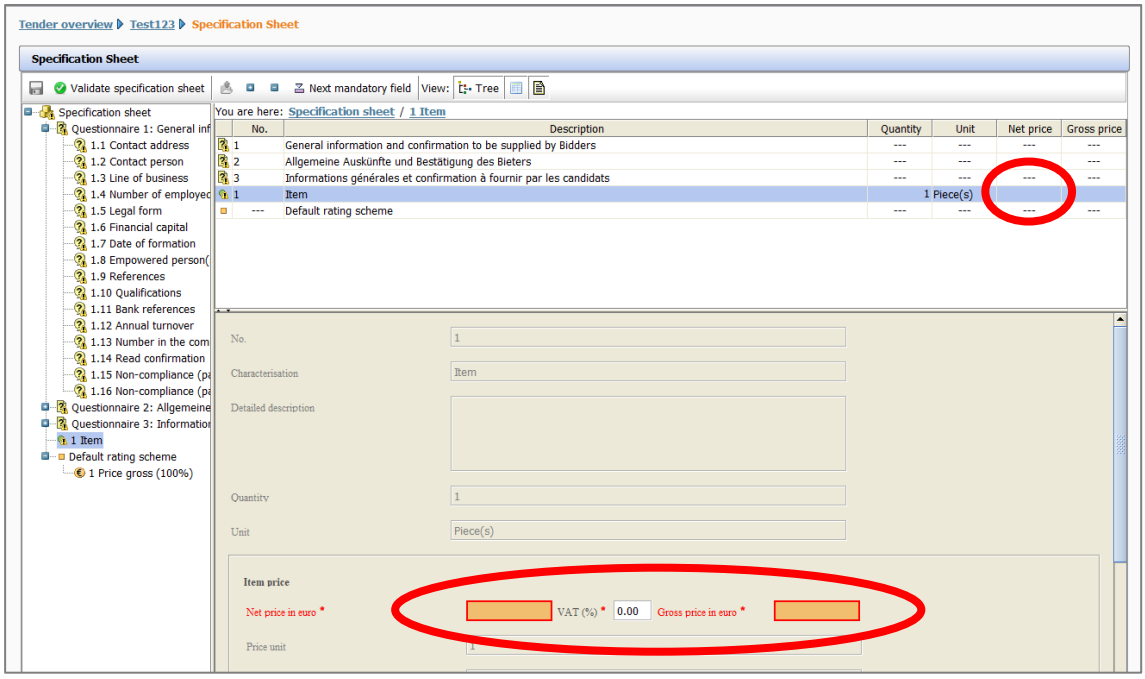
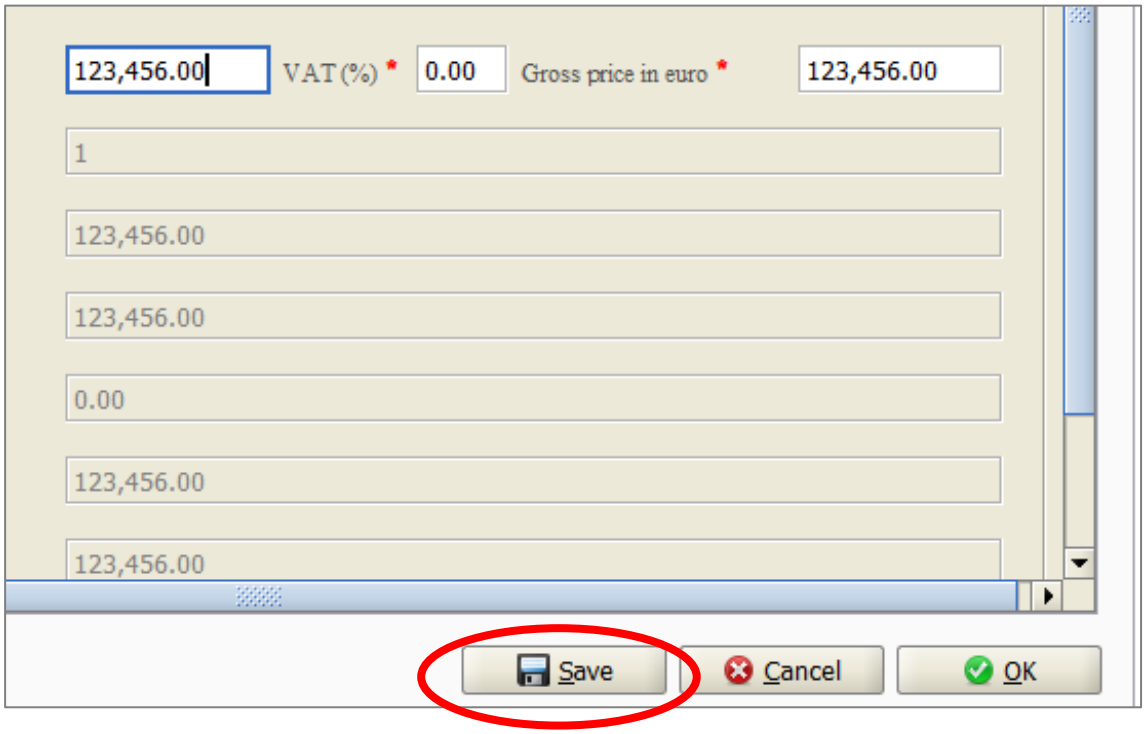
You can enter the details of your bid in two ways: either in the form area (preferable) or directly in the table view.



Tendering authorities like EPO Central Procurement have the option of defining their own criteria for helping to decide whether to accept or reject a bidder in the verification phase. Where they do this, a questionnaire is included in the tendering documents. You can save your entries at any time by using the SAVE button.



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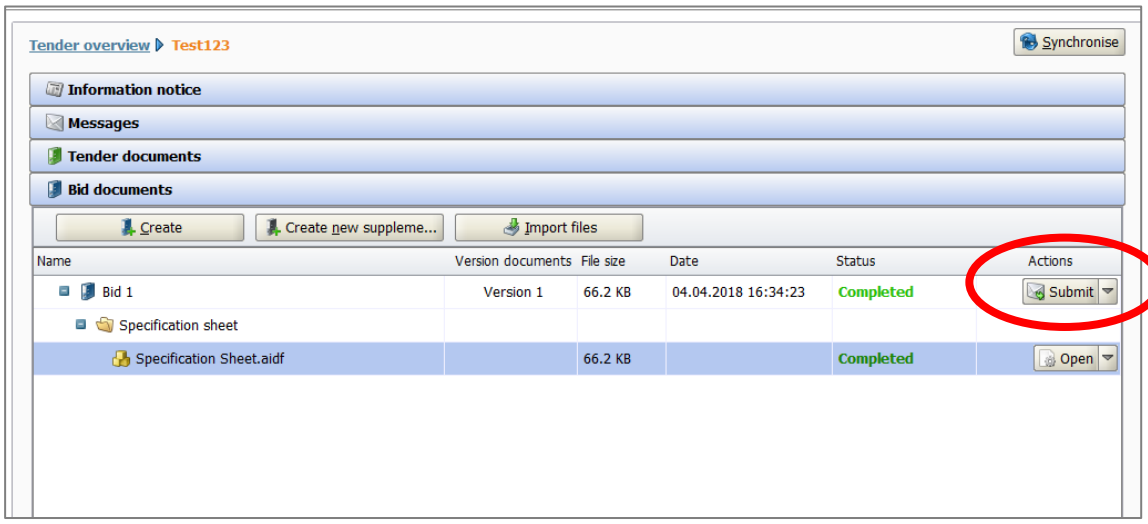
1.7.Submitting bids

1.7.1. SUBMIT button

After you have edited your bid documents, click SUBMIT (under ACTIONS), if you wish to submit your bid.



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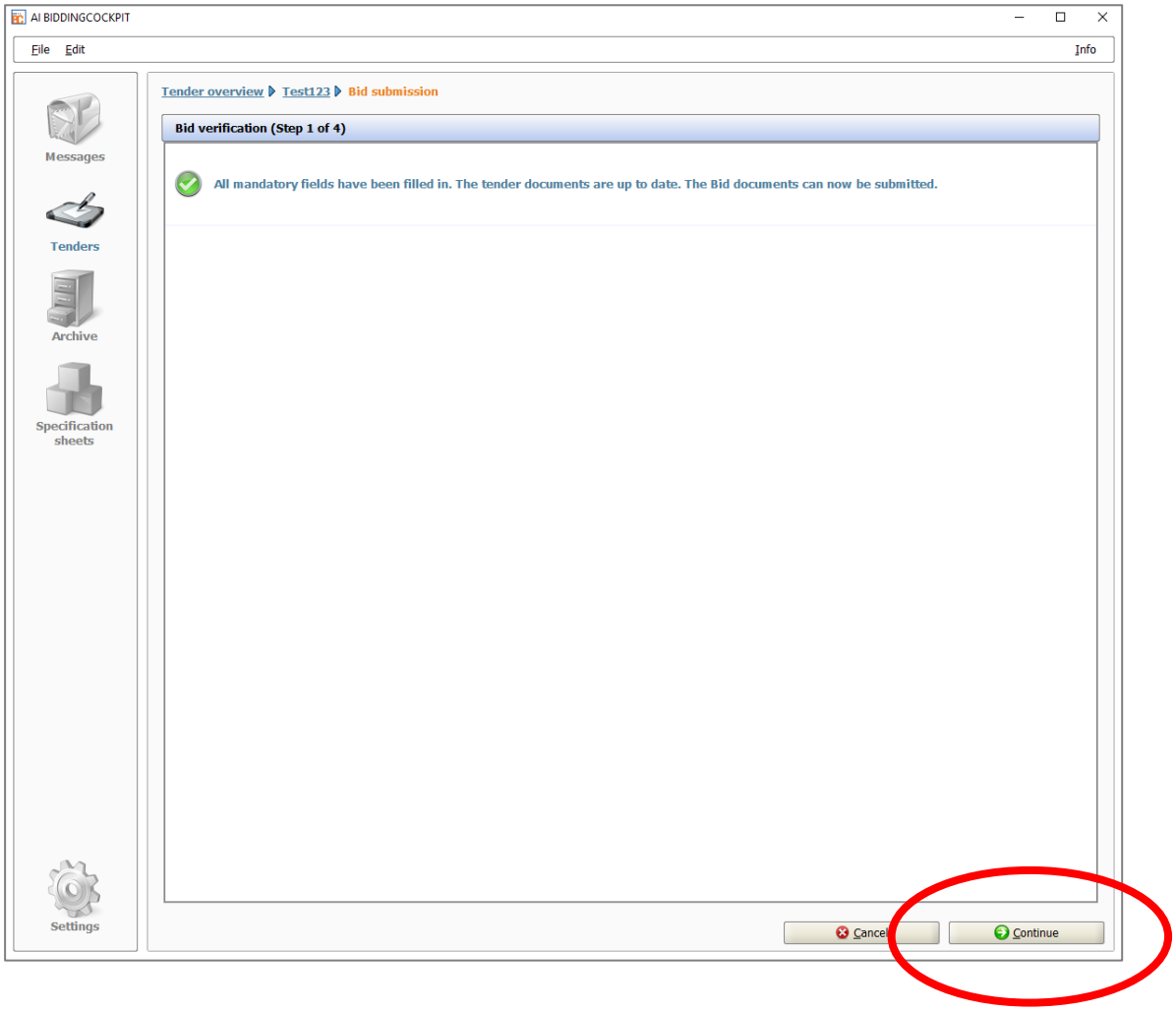
The **AI BIDDING**COCKPIT then checks whether e.g. all the mandatory fields have been filled in and whether the tender documents are up to date. You can halt the bid process at this stage if you need to make any changes. Click the button CONTINUE to proceed with the bidding process.



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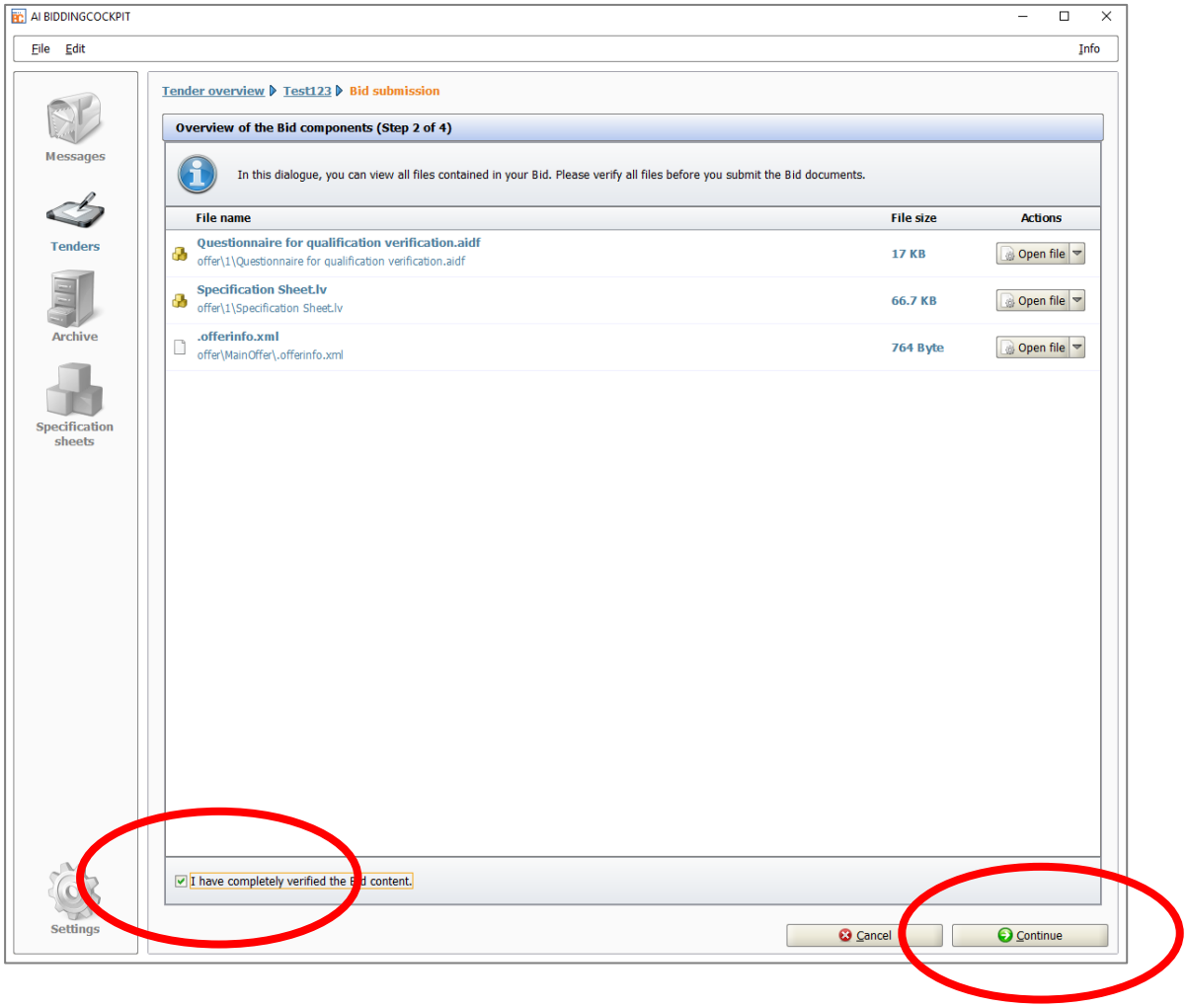
In the next window OVERVIEW OF THE BID COMPONENTS, you can click OPEN FILE (under ACTIONS) to check your bid documents one last time before sending them. After carefully checking the information displayed, confirm that you have verified the entire bid. Only then will the button CONTINUE be activated. At that stage, you can proceed with the bid submission.



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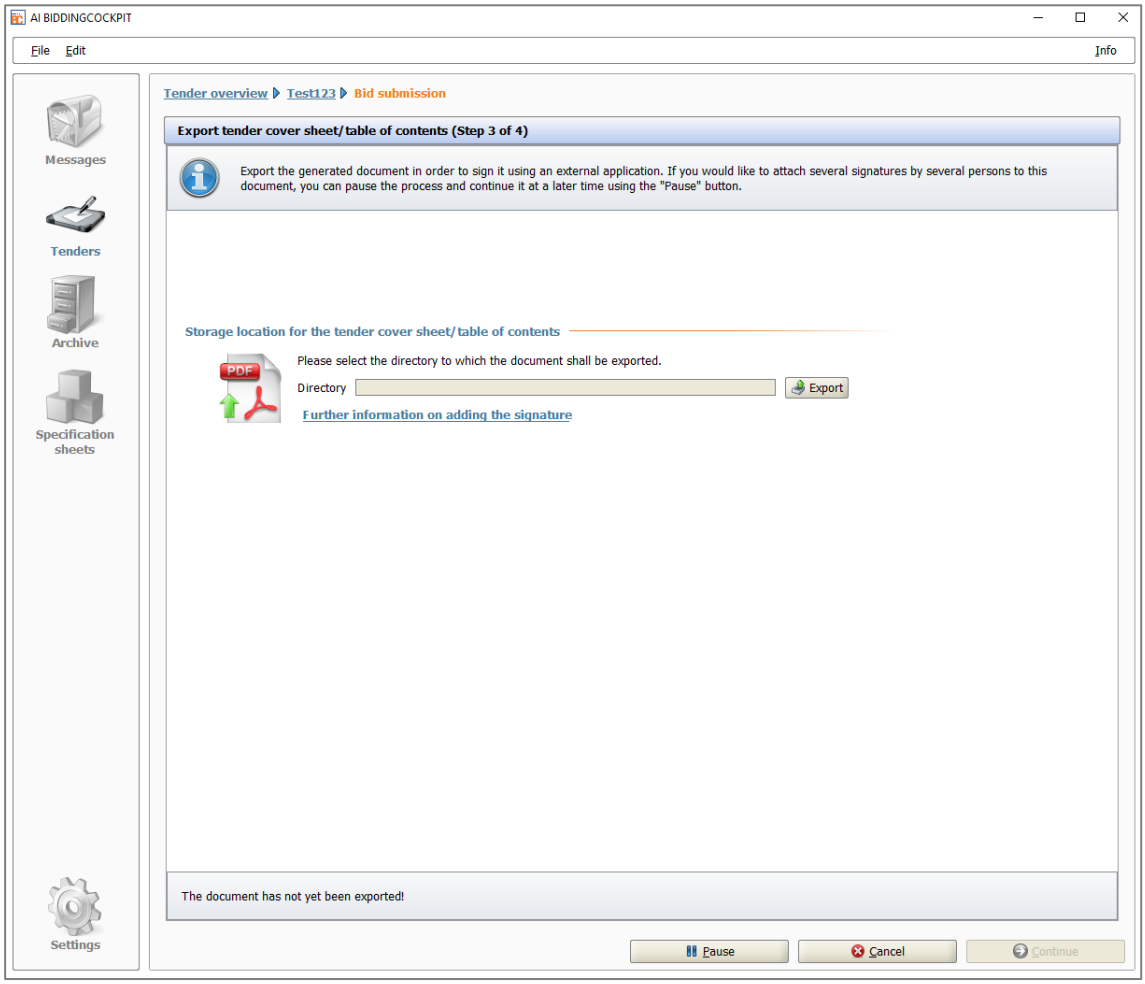
Click the button EXPORT to save the PDF summary (*TableofContents.pdf*) generated by **AI BIDDING**COCKPIT on the basis of the bid documents to a folder of your choice. Then click the button CONTINUE.



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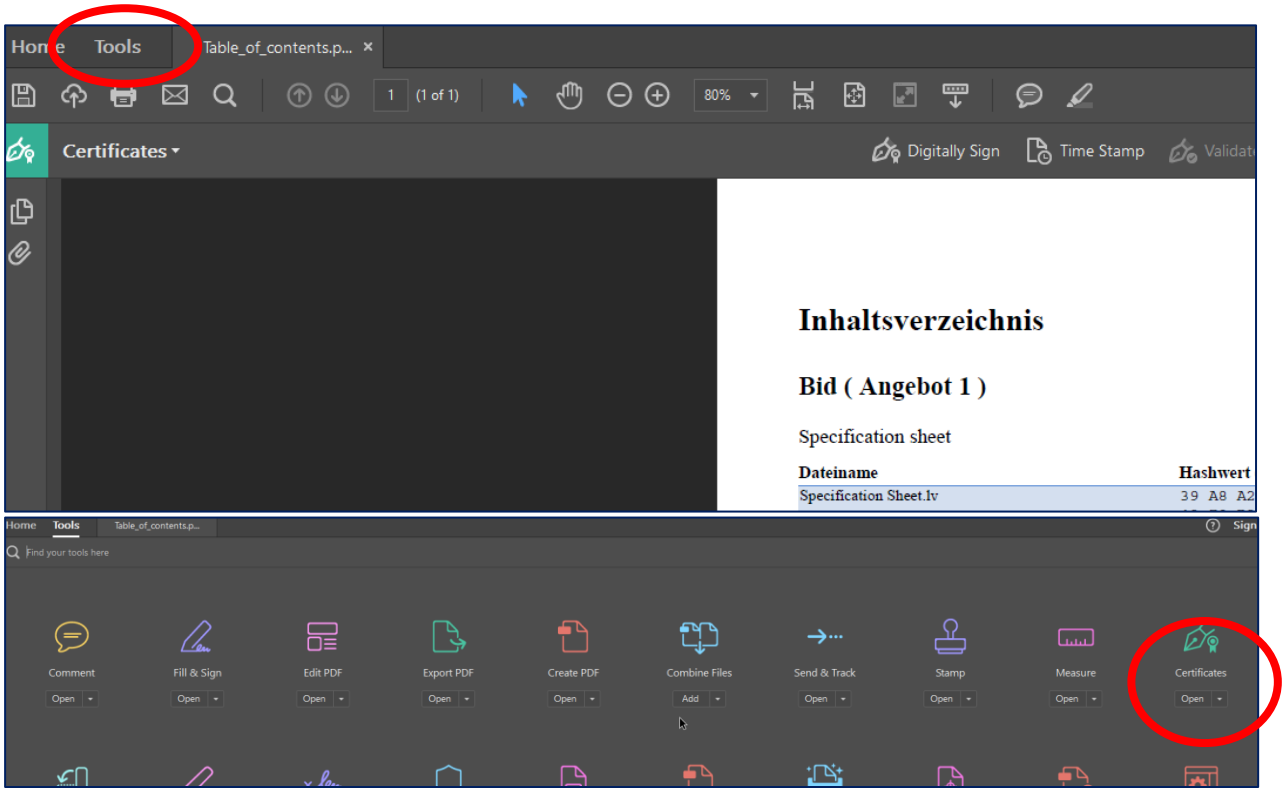
You can now sign the exported file using a signing program of your choice. In the example below, we will sign with Adobe Reader.

You may find that you can submit a bid without adding a qualified electronic signature. The **AI BIDDING**COCKPIT will warn you about this but still allow you to submit the bid. Please read the procurement documents to find out what is required for the procedure in question.

To add a signature, open the bid in Adobe Reader. You will find the bid in the folder to which you exported it. First click TOOLS and then CERTIFICATES.



Click the button DIGITALLY SIGN and create a signature field.

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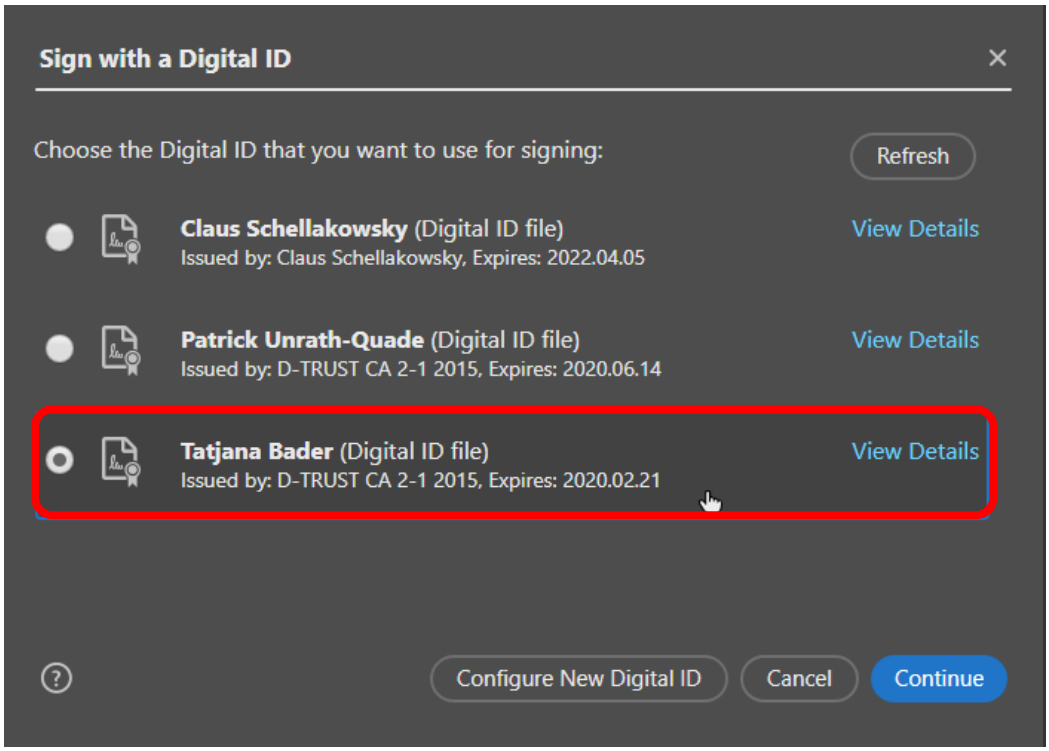
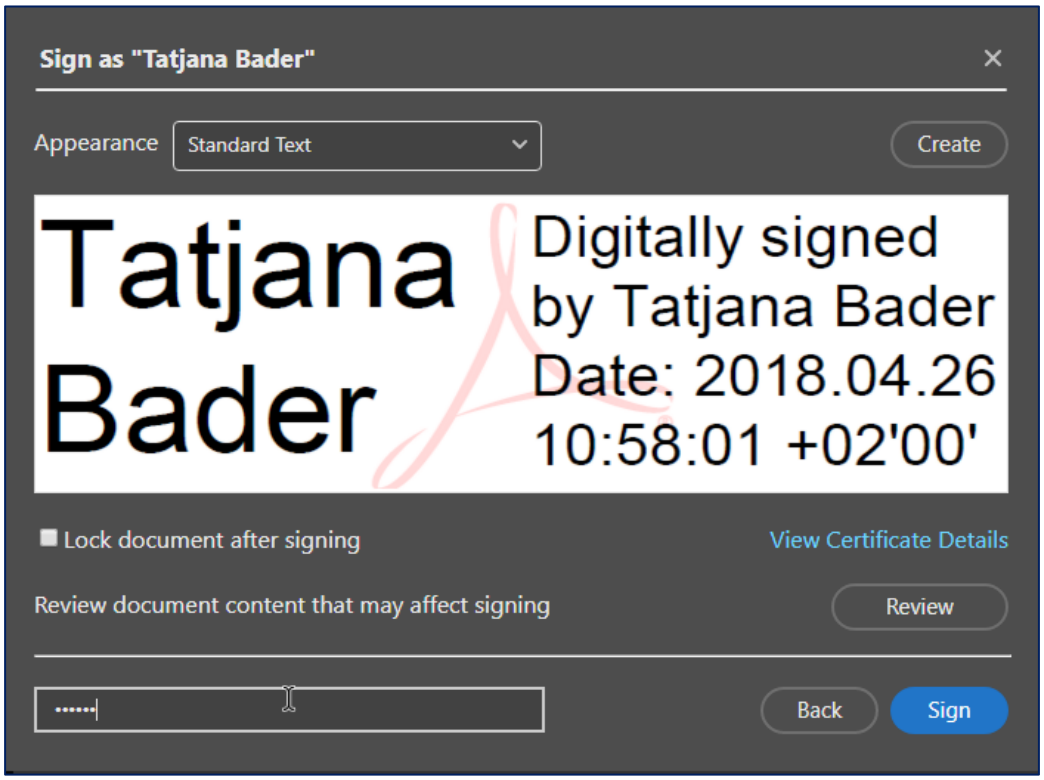
You can then choose the type of digital ID you wish to use to sign.



Now enter your password (previously defined) and click the button SIGN.



You can then save this signed document, add it to your bid documents by clicking the button IMPORT in the **AI BIDDING**COCKPIT, and submit your bid.

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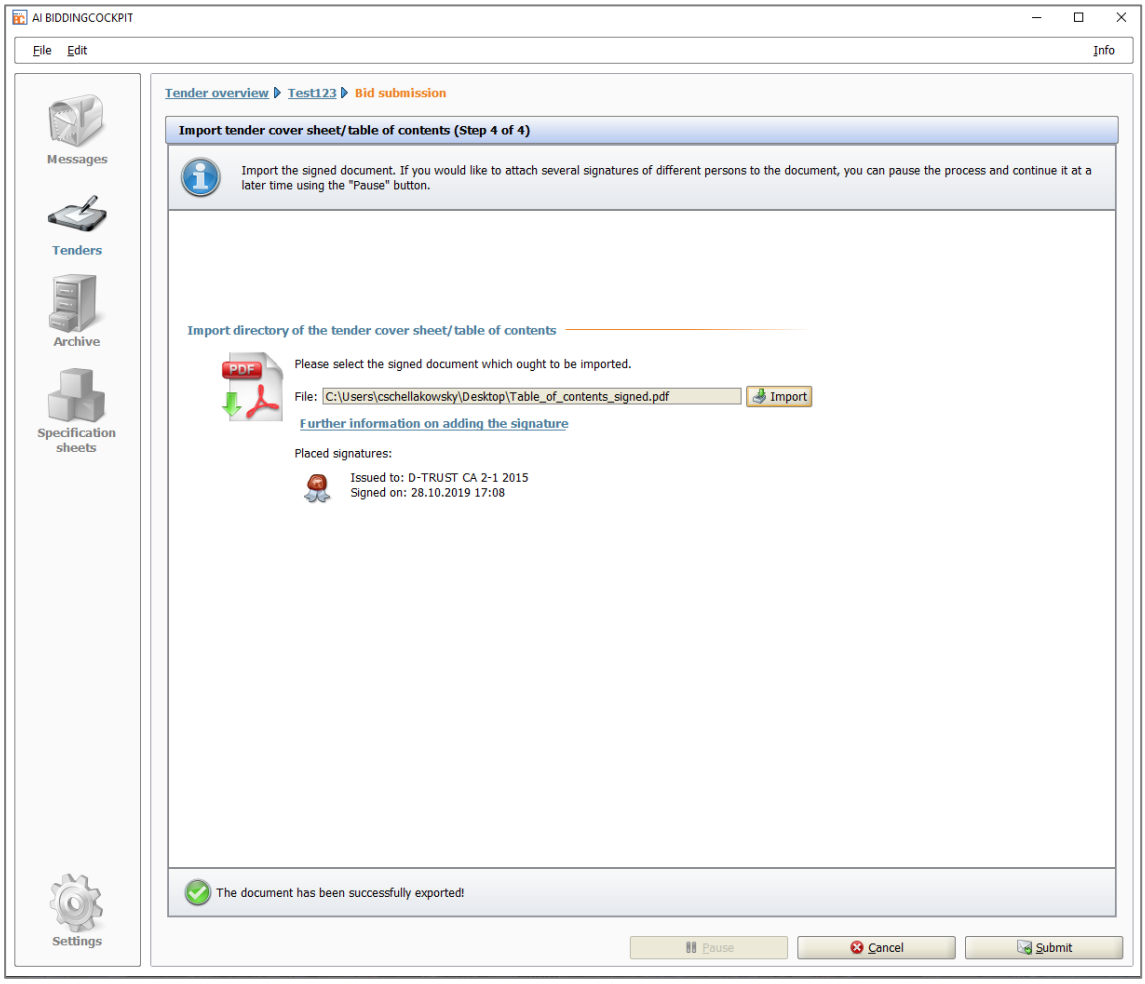

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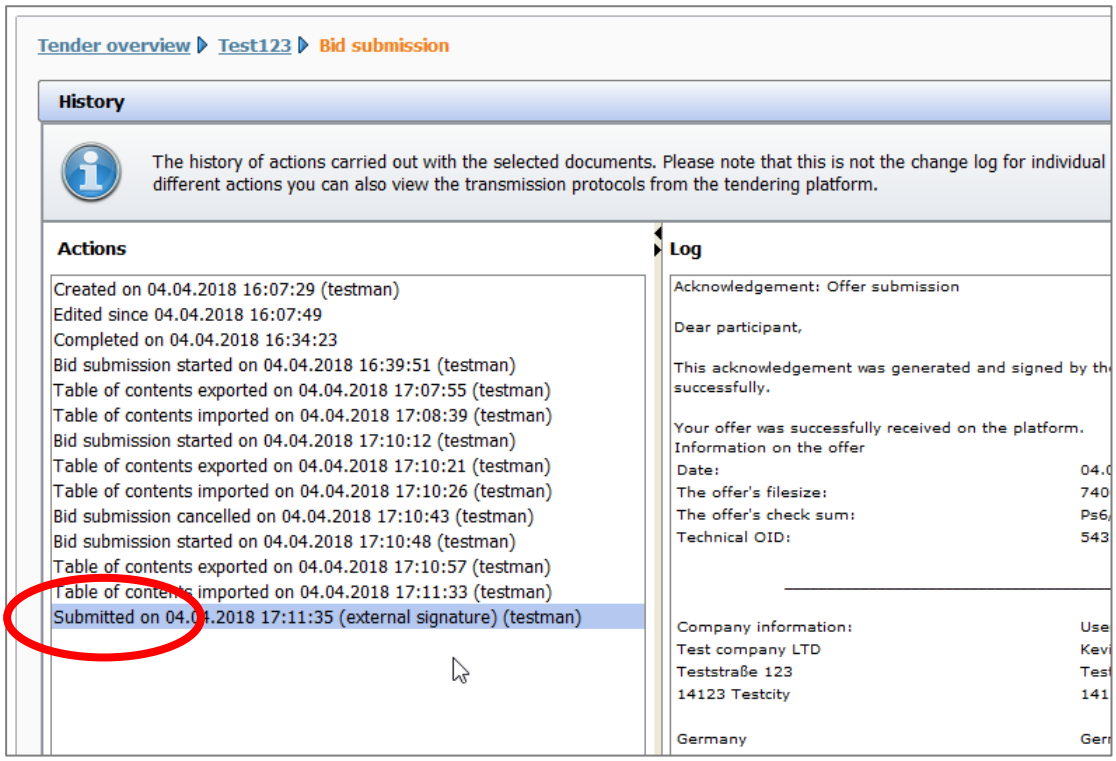
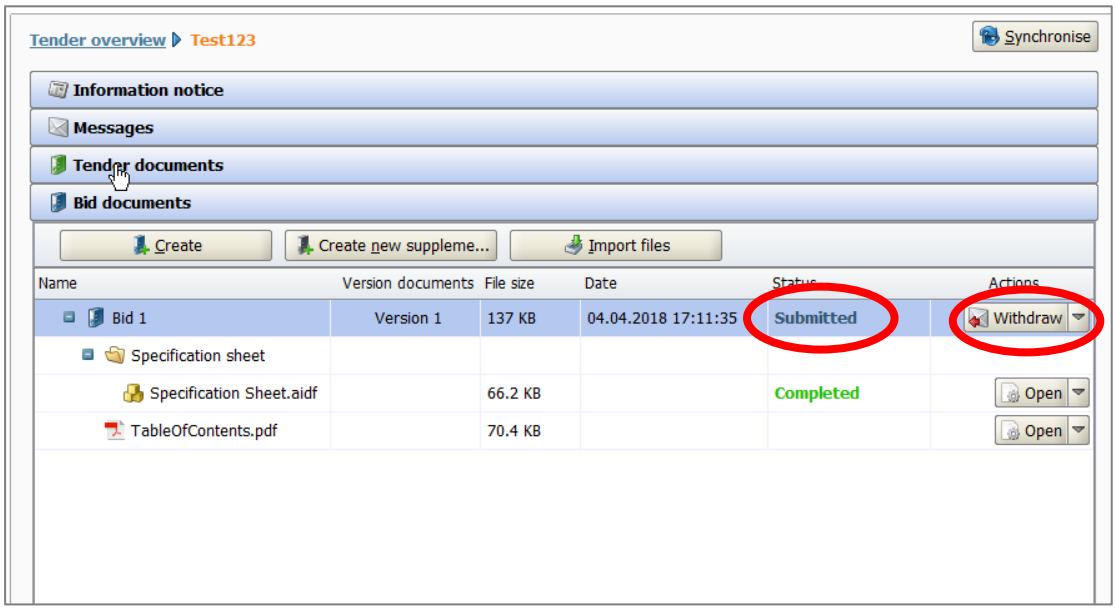
1.8. Record of bid submission

After submitting your bid, the key transmission information will be displayed in the window HISTORY and the status of your bid in the **AI BIDDING**COCKPIT will change to SUBMITTED. You can also withdraw a bid after submission, if you so wish.





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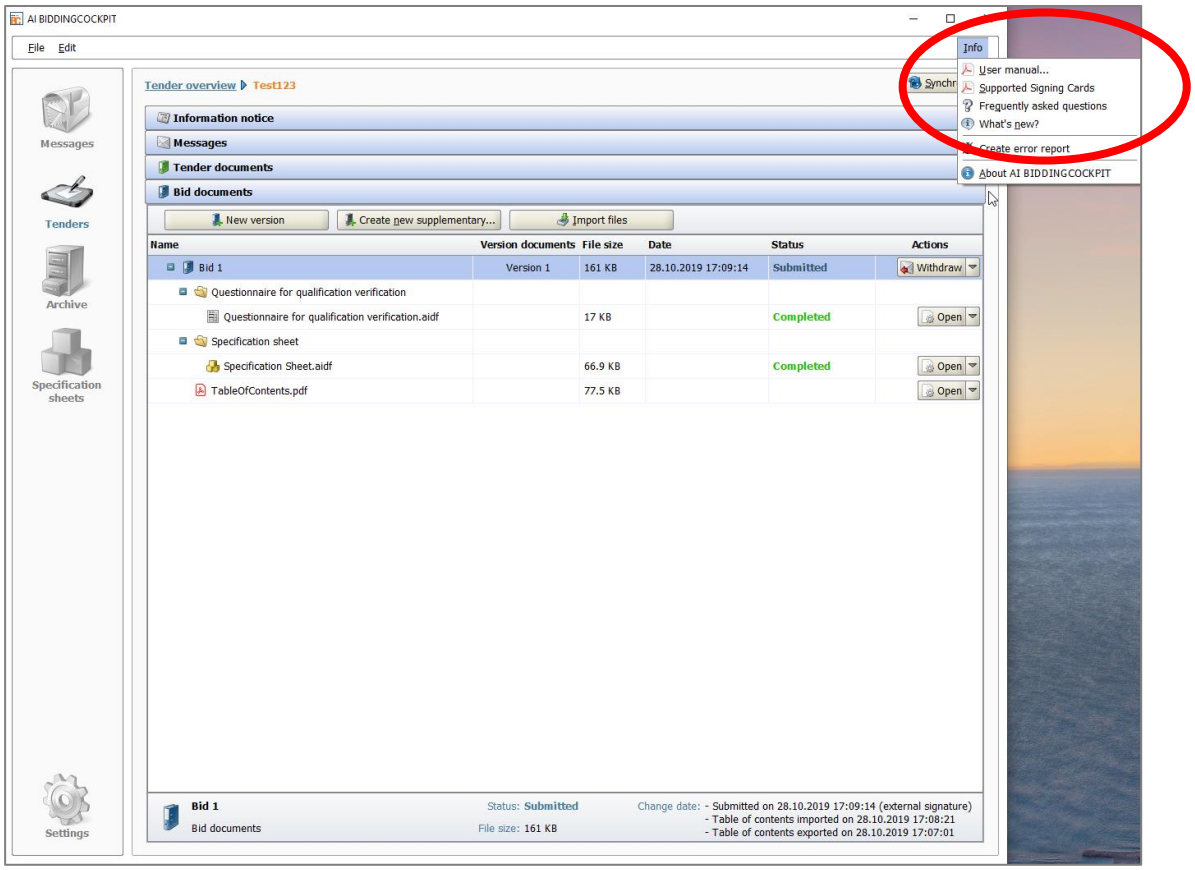
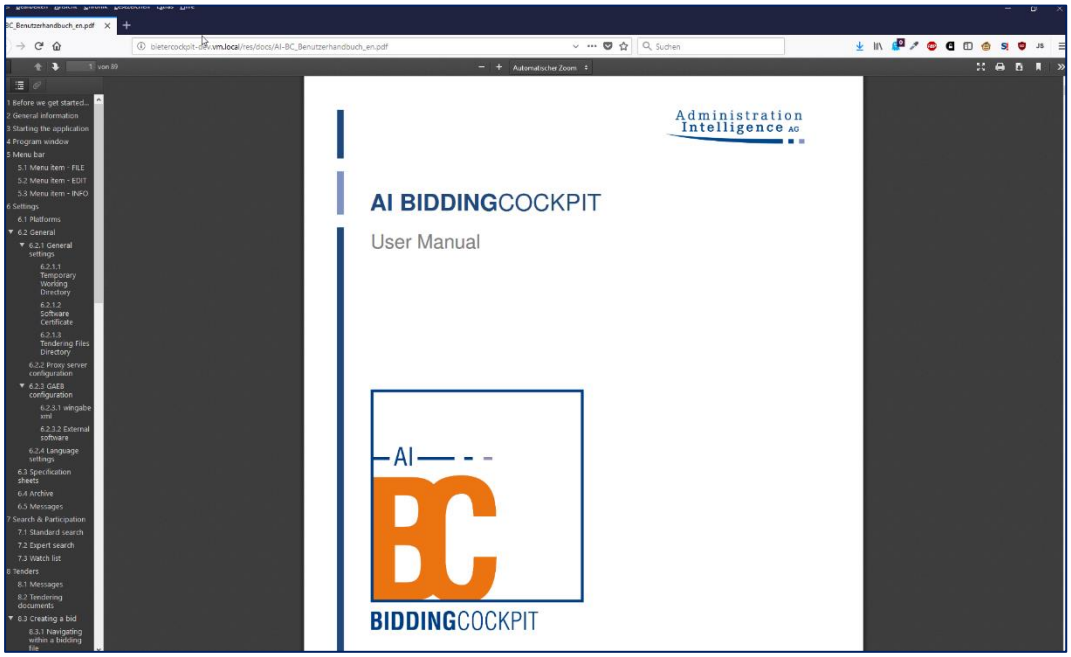
1.9. AI BIDDINGCOCKPIT user guide

For further information on **AI BIDDING**COCKPIT, please go to INFO and then USER MANUAL.



You will be taken to the **AI BIDDING**COCKPIT official home page, where the PDF user manual will be opened.



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