

Introduction

What is Online Pre-Qualification Questionnaire?

The online Pre-Qualification Questionnaire (PQQ) makes available online Templates to be created and attached electronically to a PQQ to tender notices published on the website.

This gives benefits to Buyers in having a standard and re-useable style of PQQ's that can be quickly and easily set up to attach to notices. The completed PQQ when returned is scored and evaluated on an automated basis with a complete Audit Trail. Storage of the PQQ's is all done in the Purchasers/Buyers workspace.

For the Supplier, they will have an online PQQ to complete, responding to set questions or in many cases choosing from a menu of options to simplify and speed up the completion process and then submit the completed PQQ online to the Buyer.

When would the Online Pre-Qualification Questionnaire be used?

The PQQ can be attached to a Restricted Procedure Notice but can also be used with Competitive Dialogue and Negotiated Procedure tenders, either for Site or Official Journal (OJEU) Notices.

A comprehensive Guide on the creation, scoring and evaluation of online PQQ's is attached however some key elements are recorded below.

Suppliers have access to the PQQ by "Recording an Interest" in the tender on the web site.

They then complete the PQQ online in a secure format which when finalised is submitted to the Buyer online. This is a completely electronic process with no option to submit paper documentation such as tax or insurance certificates. Suppliers are required to give evidence/reference to this documentation in the PQQ which can be verified at later stage if necessary.

The individuals designated to score or evaluate the completed PQQ's must be selected at time of creation of the document. All scoring and evaluation is done on line with the system collating the scoring electronically. The option is available to score any submission received prior to the closing date but evaluation cannot be completed (by those individuals nominated to do so) until after the first stage closing date of the tender.

The provision of an electronic PQQ facility is intended to provide real cost and environmental benefits to the procurement process in Public Sector Tendering.

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1. PQQ Workspace

The purchaser's PQQ Workspace is where they can control all aspects of the PQQs they create.

Main Menu > Purchasers/Buyers Pages > e-PQQ Workspace

The page is divided into 2 major sections, *PQQ Management* and *Templates*.

1.1 PQQ Management

The PQQ Management section is divided in 3 sections, New PQQs which are not yet released, Released PQQs which are ready to be used in a tender notice, and Published PQQs which have already been used in a tender notice.

1.1.1 New

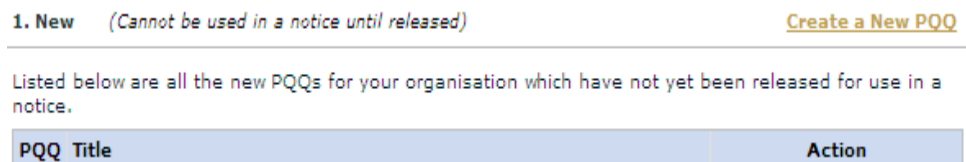


Figure 1

The New section of the PQQ Workspace lists all PQQs created by the purchaser which have not yet been released for use in a tender notice.

In this section the purchaser can edit (see 3.1.3), release (see 3.1.2), delete (see 3.1.4) or create a new PQQ (see 3.1.1).

1.1.2 Released

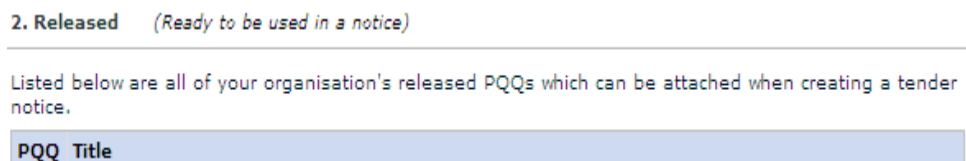


Figure 2

The Released section of the PQQ Workspace simply displays all of the PQQs which have been created and released by the purchaser, but not yet attached to a Tender Notice.

1.1.3 Published

3. Published *(Already used in a notice, waiting to be scored or evaluated)*

Listed below are all the PQQ's for your organisation which have been published with a tender notice and are waiting to be scored, or evaluated if the PQQ deadline has passed.

PQQ	Tender ID	Title	Deadline	Score	Evaluate
-----	-----------	-------	----------	-------	----------

Figure 3

The Published section of the PQQ Workspace lists all of the PQQs created by the purchaser which have been attached to a Tender Notice.

This is the section where the *scoring (see 3.2)* and *evaluation (see 3.3)* of the supplier PQQ Responses (*see 5*) begins.

1.2 Templates

The template section of the PQQ Workspace is where the purchaser can view all of the system standard templates and decide which one to use in a New PQQ. Templates are explained in more detail in the following section.

2. Templates

2.1 Introduction To Templates

Templates are used to form the basis of new PQQs. For example, you may have a Construction template (see <http://constructionprocurement.gov.ie/suitability-assessment-questionnaires/>) that is used to create PQQs for Construction related tenders, or an I.T. template that is used to create PQQs for I.T. related tenders.

A template consists of one or more template sections, with each section consisting of one or more template questions. When you create a new PQQ, you must select a template to form the basis of that PQQ, as this contains all of the questions.

2.2 Standard System Templates

Standard System Templates are the default templates which permanently exist in the system and can be used at anytime to create a new PQQ. These system templates cover the main categories such as construction and I.T. etc.

For construction Templates please see

<http://constructionprocurement.gov.ie/suitability-assessment-questionnaires/>

2.3 View The System Templates

The system templates can be viewed from the purchasers 'e-PQQ Workspace'

Main Menu > Purchasers/Buyers Pages > e-PQQ Workspace

At the bottom of the page there is a *Templates* section with a link to **View System Templates**.

Templates

System Templates

System templates are used to form the basis of new PQQs. For example, you may use a Construction template to create PQQs for Construction related tenders, or an I.T template to create PQQs for I.T related tenders.

You will be asked to select a system template when you create a new PQQ.

- [View System Templates](#)

Figure 4

3. PQQs

3.1 Creation

3.1.1 Create A New PQQ

A new PQQ can be created from the purchasers ‘e-PQQ Workspace’

Main Menu > Purchasers/Buyers Pages > e-PQQ Workspace

At the top of the page there is a *PQQ Management* section. In the *New* section you will see a link for **Create a New PQQ**.

PQQ Management

1. New (Cannot be used in a notice until released)

[Create a New PQQ](#)

Listed below are all the new PQQs for your organisation which have not yet been released for use in a notice.

PQQ Title	Action
-----------	--------

Figure 5

You will then be asked to enter you new PQQ details including the selection of a System Standard Template that matches the type of PQQ you are creating. (See 1. Templates)

The screenshot shows a 'PQQ Details' form with the following elements:

- PQQ Title:** A text input field.
- Max Score:** A text input field containing the value '1000'.
- Show Rationale:** A checkbox that is currently unchecked.
- Show Scoring:** A checkbox that is currently unchecked.
- Template:** A dropdown menu with 'System - Standard Template' selected.
- Buttons:** 'Create' and 'Cancel' buttons are located on the right side of the form.

Figure 6

The template that you choose has a set scoring and weighting for all of its questions.

3.1.2 Release A PQQ

Before a PQQ can be used in a Tender Notice it must firstly be released. A PQQ can be released from the purchasers 'e-PQQ Workspace' under **PQQ Management > New**.



Figure 7

2.1.2.1 PQQ Response Access

When you release the PQQ you will first be asked to select the users who will have access to the responses to this PQQ.

Scorer	Evaluator	Name	Email
<input type="checkbox"/>	<input type="checkbox"/>	Marjorie Robertson	marjorie@tendersdirekt.co.uk
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	David Thomson	david@klickstream.com
<input type="checkbox"/>	<input type="checkbox"/>	mike mackay	michael@mytenders.co.uk
<input type="checkbox"/>	<input type="checkbox"/>	Millstream Manager	manager@klickstream.com
<input type="checkbox"/>	<input type="checkbox"/>	Melinda Plewa [TendersDirekt]	melinda@klickstream.com
<input type="checkbox"/>	<input type="checkbox"/>	John Brown [TendersDirect]	john@klickstream.com
<input type="checkbox"/>	<input type="checkbox"/>	Klickstream Robertson	marjorie@klickstream.com
<input type="checkbox"/>	<input type="checkbox"/>	Robert Brown	rob@klickstream.com
<input type="checkbox"/>	<input type="checkbox"/>	Alan Brown [TendersDirect]	alan@klickstream.com
<input type="checkbox"/>	<input type="checkbox"/>	Robert Brown	robert@klickstream.com
<input type="checkbox"/>	<input type="checkbox"/>	Robert Brown	robertbrown@klickstream.com
<input type="checkbox"/>	<input type="checkbox"/>	Tim Williams [TendersDirect]	tim@klickstream.com
<input type="checkbox"/>	<input type="checkbox"/>	mike mackay	michael@klickstream.com

Save

Cancel

Figure 8

Scorer – Users who will have to score all of the responses to this PQQ. There must be at least one scorer selected.

Evaluator – Users who will be part of the evaluation process for this PQQ when scoring is complete. There must be at least one evaluator selected.

If there is only going to be one user in your organisation who is responsible for this PQQ then they can be selected as a scorer and an evaluator.

When you are happy with the users you have selected click the **Save** button to proceed to the next stage of the release process. This list can be modified at a later stage.

2.1.2.3 PQQ Release

The final stage of the release process simply involves reviewing the PQQ details and ensuring you have the correct users on the Access list.

The PQQ questions can still be modified at this stage by selecting the **Edit** link at the top of the **PQQ Review**.

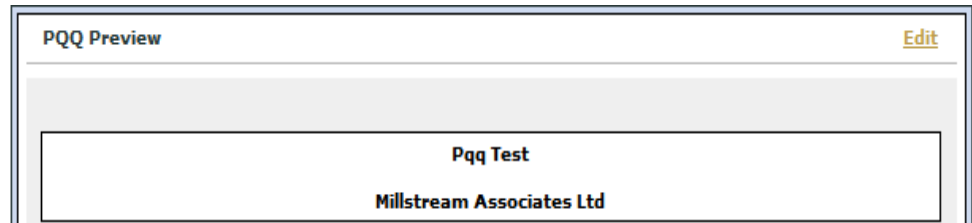


Figure 9

The **PQQ Access List** can also be modified at this stage from the details section.

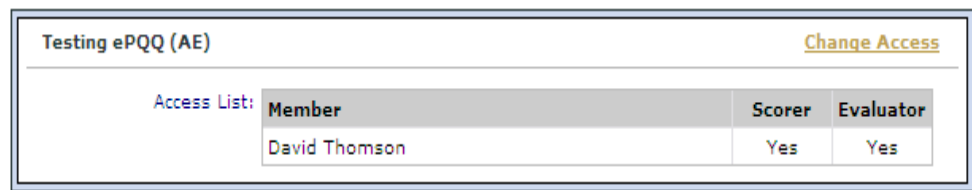


Figure 10

When you are happy with the PQQ setup the final step is to Release the PQQ. This is achieved by clicking the **Release** button in the **PQQ Release Confirmation** section.

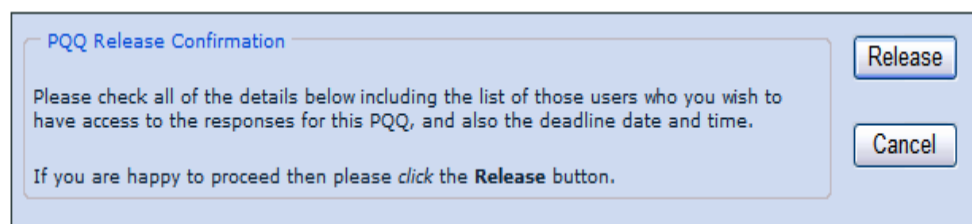


Figure 11

You will then be returned to your PQQ Workspace and this PQQ is now ready to be attached to a Tender Notice.

3.1.3 Edit A PQQ

A PQQ can be edited at any time up until it is released for use in a Tender Notice. There are two ways in which you can edit a PQQ.

Firstly the purchaser can edit a PQQ from the purchaser’s ‘e-PQQ Workspace’ under **PQQ Management > New**.



Figure 12

The second way in which to edit a PQQ is before the PQQ is released as per section 2.1.2.3 above.

Upon selecting the relevant **Edit** link the user will be taken to the PQQ Show page. From here the user should again click the Edit link in the details section.

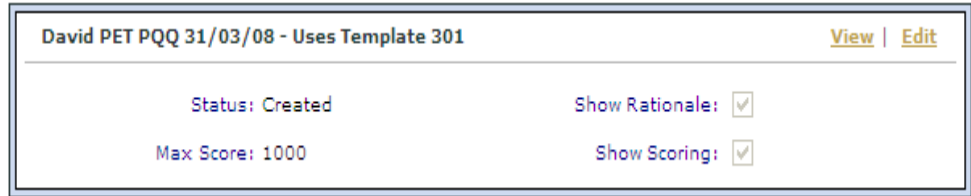


Figure 13

This will then take the user to the PQQ Edit page where they will be able to edit the PQQ details including the title and the Max Score.

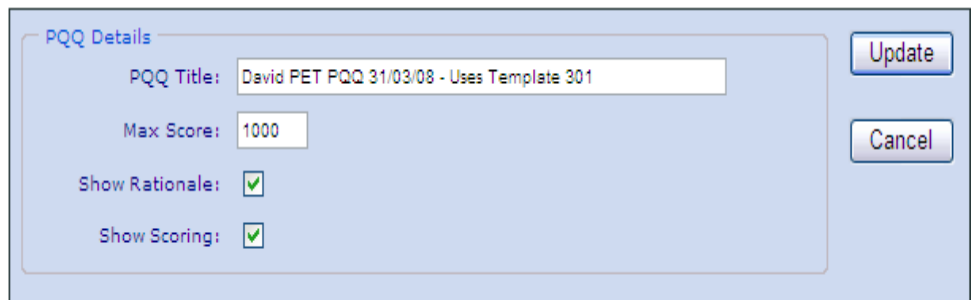


Figure 14

When the user is happy with the changes they should click the **Update** button upon where they will be returned to the PQQ Show page.

3.1.4 Delete A PQQ

A PQQ can be deleted at any time up until it is released for use in a Tender Notice.

The purchaser can delete a PQQ from the purchasers 'e-PQQ Workspace' under **PQQ Management > New**.



Figure 15

3.1.5 Attach A PQQ To A Tender Notice

A PQQ is attached to a Tender Notice during the notice creation process. The purchaser will be unable to publish the tender notice with the PQQ attached until the PQQ has been released.

The attachment process begins on the Additional Notice Options page when creating a new Tender Notice. The purchaser should select the **Electronic PQQ** option from the **Additional Options** section.

Additional Notice Options

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

Jump to: ▾

Noted Interest

Noted Interest

Record details of suppliers interested in your notices. You can then issue clarifications, change deadline dates etc and the relevant suppliers will be informed automatically.

Note: Noted Interest must be selected if you wish to use the additional options.

Additional Options

Additional Documents

Attach RFTs and any other supporting documentation for instant download by your suppliers.

Questions and Answers

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

Tender Postbox

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

Electronic PQQ (pre-qualification questionnaire)

Issue PQQ documentation to suppliers electronically and evaluate their responses electronically before issuing tender documents to the successful suppliers.

Figure 16

After selecting the Electronic PQQ the purchaser will have to select the PQQ to be attached.

Electronic PQQ

Please select the questionnaire that should be attached to this notice.

Jump to: Official Purchasing Authority Address

PQQ Selection

Pqq Test

Alternatively, you can [create a new PQQ](#) and return to the notice by way of your workspace.

Next

Save

Cancel

Figure 17

That is all there is to attaching a PQQ to a tender notice. The notice should be completed as usual and the PQQ will be attached upon publication.

3.2 Scoring

3.2.1 Scoring A Question

To begin the scoring process the Authority User must select the **Score** link next to the appropriate PQQ in the Published PQQ List in the PQQ Workspace. Only those Authority Users who were selected on the Access List (See 2.1.2.1 PQQ Response Access) during the PQQ Creation process will have a link. Those users who were not on the access list will be able to see the PQQ, but they will not see the score link.

601	MAY001861	Financial PQQ Test - tax and insurance	18/07/2008	Score	Waiting
621	MAY001881	David Final Financial Test PQQ	29/08/2008	Score	Waiting

Figure 18

This will then take the authority user to a list of all those responses for that specific PQQ. The user can choose to view or begin scoring a specific PQQ Response.

PQQ Responses

[Return to PQQ Workspace](#)

David Final Financial Test PQQ

Status: Published Show Rationale:

Max Score: 1000 Show Scoring:

A list of suppliers who have responded to the PQQ are shown below. Please select the **Score** link for a specific response to apply your score to each of the questions in the PQQ.

Resp ID	Supplier	Action
661	Millstream	View Score
681	Millstream Associates Limited	View Score

Figure 19

After the user has clicked the **Score** link next to the appropriate PQQ Response they will be taken to the first stage of the scoring process which displays a list of all of the sections in the PQQ.

Score Supplier Response

[Back to Responses](#)

661: Millstream

Submitted: 02/06/2008

Details of the sections that comprise this PQQ are shown below. To score a question you can either select from the **Jump to** drop down list below, or navigate to the question by **opening** a specific section from the list below.

Jump to: Score Supplier ▼

No	Section Title	Action
1	Tax	Open
2	Insurance	Open
3	Accounts	Open

Figure 20

To view the questions the user should click the **Open** link next to the appropriate section, which will then display all of the questions which have to be scored in that specific section.

PQQ Response Section - Questions

[Back to Supplier Response](#)

661: Millstream

Section: 3. Accounts

Details of the questions that comprise this PQQ Section are shown below. The score to the answer to the question *click* the **Score** link next to the appropriate question title.

No	Question Title	Action
1	Financial Information	Score

Figure 21

To score a question the user should click the **Score** link next to the appropriate question. This will then take the user to that specific question for scoring.

PQQ Response Question

Please enter a score for the response to this question and *click* the **Next** button.

Jump to: 1.1 Tax Clearance ▾

Question Details

Question No: 1:1
 Title: Tax Clearance
 Description: If you have a current tax clearance certificate please enter the details below:

Criteria Rationale:

tax rationale

Scoring Scheme:

tax scoring scheme

Supplier Answer:

Registration No	Tax Certificate No	Expiry Date
<input style="width: 100%;" type="text" value="bsdfg"/>	<input style="width: 100%;" type="text" value="sdfg"/>	<input style="width: 100%;" type="text" value="sdfg"/>

Please tick the box to confirm that the authority has permission to check your tax cleared status using the Revenue Commissioners on-line verification facility.

Question Score:

Please enter a score between 0 - 5

Score:

Figure 22

The user will be presented with the Question Details, Criteria Rationale, Scoring Scheme, Supplier Answer and Question Score. It is in this final section that the user should enter a score between 0 – 5 for the specific question.

To move to the next question for scoring the user should click the **Next** button or use the **Jump to** facility in the top right hand corner to move to an alternative question.

When the user has finished scoring the final question they will be taken to the final stage of the scoring process where they will submit the score for evaluation. (See 3.2.2 Submitting a Score)

3.2.2 Submitting A Score

Before moving to the PQQ Score Submit page, the system performs a check to make sure that all of the required questions have been scored. If any of the questions have not been scored then the authority user will be presented with a list of those questions.

PQQ Score Submit - Unscored Responses

2 mandatory questions(s) was/were unscored in this Supplier Response. The questions listed below should be scored before this score can be submitted. Click on the question title to score the question now, or click the **Continue** button if you are happy for these questions to be unscored.

Question	Status
1.1 Tax Clearance	Scored
2.1 Insurance	Not Scored
3.1 Financial Information	Not Scored

Figure 23

The user does not have to score these questions and can continue to the submission screen by clicking the **Continue** button. If however they decide to go back and score a question then they can simply select the title of the question which will return them to that question for scoring.

When the user is satisfied that the scoring is as it should be, they will then have to submit the score for evaluation.

PQQ Score Submit

If you are now ready to submit the score for this PQQ response, please accept the declaration and click the **Submit** button.

Response Details

Response To PQQ: David Final Financial Test PQQ

Response By: Millstream Manager

Company: Millstream Associates Limited

Position: Manager

Declaration

I declare that to the best of my knowledge that the scores submitted for this PQQ response are done so without bias or prejudice. I understand that the information will be used in the evaluation process to assess this organisation's suitability to be invited to tender.

SCORE CARD
David Final Financial Test PQQ
Millstream Associates Limited

Para	Criterion	Score	Weighting	Weighed Score	Section Significance	Section Weight	Max Score	Total
1 Tax								
1.1	Tax Clearance	3	2	6				
Tax totals:				6	25%	25.00	250	150.00
2 Insurance								
2.1	Insurance	-	2	-				
Insurance totals:				0	50%	50.00	500	0.00
3 Accounts								
3.1	Financial Information	-	4	-				
Accounts totals:				0	25%	12.50	250	0.00
TOTAL:				6				150.00

Figure 24

The submission page displays the score card for the scoring of that specific response including all section significances, weightings and total scores.

When the user is satisfied they should agree to the declaration statement and click the **Submit** button which will send this score for evaluation.

3.3 Evaluation

3.3.1 Starting The Evaluation

The evaluation process for a PQQ can begin once the PQQ Deadline Date has passed. If the deadline date has not passed the authority user will see the message ‘waiting’ under the evaluation column next to the appropriate PQQ title.

621	MAY001881	David Final Financial Test PQQ	09/06/2008	Score	Waiting
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Figure 25

After the PQQ Deadline has passed the evaluation process can begin and the Authority User must select the **Evaluate** link next to the appropriate PQQ in the Published PQQ List in the PQQ Workspace. Only those Authority Users who were selected on the Access List (See 2.1.2.1 PQQ Response Access) during the PQQ Creation process will have a link. Those users who were not on the access list will be able to see the PQQ, but they will not see the evaluation link.

621	MAY001881	David Final Financial Test PQQ	08/06/2008	Score	Evaluate
-----	-----------	--	------------	-----------------------	--------------------------

Figure 26

The user will then be taken to the score status page for the PQQ.

PQQ Evaluation - Scoring Status

[Return to PQQ Workspace](#)

All scores must be complete before proceeding to the next stage.

David Final Financial Test PQQ		Continue Evaluation
Status: Published	Show Rationale: <input checked="" type="checkbox"/>	
Max Score: 1000	Show Scoring: <input checked="" type="checkbox"/>	

A list of supplier responses to this PQQ are shown below. The scoring status for each response is shown under each of the scorers initials.

- **Incomplete** - The scorer has not completed the scoring for that specific response.
- **Scored** - The scorer has completed the scoring for that specific response.

If you require a particular scorer to re-score a supplier response then *click* on the appropriate **Re-score** link. If you are happy to proceed please *click* the **Continue Evaluation** link above.

SCORING STATUS	
Supplier	D. T.
Millstream	Incomplete
Millstream Associates Limited	Scored (Re-score)

Figure 27

The status page displays a list of all of the Responses for this PQQ, as well as the scoring status for each scorer for each response. The scorer is identified by their initials at the top of each column.

For the evaluation process to move forward to the next stage, the scorers must have completed the scoring for each response. If the scoring is not complete they will see an *'Incomplete'* message under their initials for a specific response, as well as a message at the top of the screen which states *'All scores must be complete before proceeding to the next stage'*. The scores which are complete will have the message *'Scored'*.

The user evaluating the scores also has the option to force a submitted score to be re-scored. To do this the user should select the **Re-score** link next to any Scored response. This means that the scorer will have to review their score and resubmit the score for evaluation.

PQQ Score Unlock

If you wish to unlock this score please click the **Unlock** button. To return to the evaluation screen please click the **Cancel** button

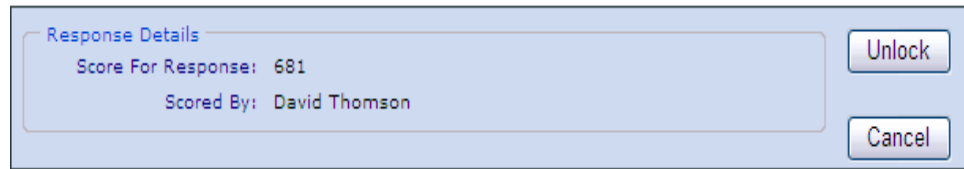


Figure 28

To view the scoring for a specific response the evaluator should click the supplier name, which will then in turn present a breakdown of all the scores for that response by scorer.

When all of the scoring is complete the evaluator can continue the evaluation process by clicking the **Continue Evaluation** link in the details section.

SCORING STATUS	
Supplier	D. T.
Millstream	Scored (Re-score)
Millstream Associates Limited	Scored (Re-score)

Figure 29

3.3.2 Completing The Evaluation

After the scoring for each PQQ Response is complete, the evaluator must indicate the **Number of Suppliers** who should be allowed to progress to the restricted procedure stage 2.

PQQ Evaluation - Final Scores

[Return to PQQ Workspace](#)

David Final Financial Test PQQ	Complete Evaluation
Number of Suppliers: <input type="text" value="0"/> ▼	

Please indicate in the section above the **Number of Suppliers** who should be allowed to progress to the restricted procedure stage 2 and *click* the **Complete Evaluation** link.

The total Number of suppliers will be taken from the list in *descending order by Total Score*.

Supplier	Total Score
Millstream	500.00
Millstream Associates Limited	150.00

Figure 30

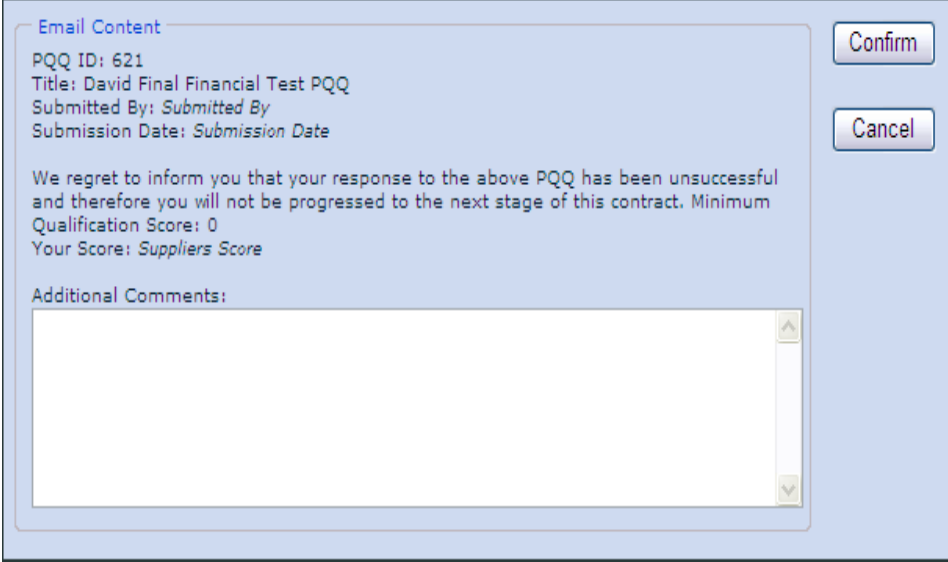
The results summary page displays a list of all responses for this PQQ in descending order by total score. The evaluator should select how many of these responses should progress. This is achieved by selecting the **Number of Suppliers** from the drop down list and clicking the **Complete Evaluation** link. This will automatically create a new Restricted Procedure Stage 2 notice which is populated with the suppliers selected in this evaluation process. The Restricted Procedure Stage 2 is outside the scope of this User Guide.

If there are any unsuccessful responses, e.g. the evaluator selects 2 from 3 responses, then the evaluator will have to complete a response to the unsuccessful supplier.

PQQ Unsuccessful Responses

Your selected suppliers have progressed to the restricted procedure stage 2 for this tender notice. The list below displays all of those suppliers who were unsuccessful.

Displayed below is the default message which will be sent to the unsuccessful suppliers. Please provide any additional comments and *click* the **Confirm** button to send the email and progress to the Stage 2 process for this contract.



Email Content

PQQ ID: 621
 Title: David Final Financial Test PQQ
 Submitted By: Submitted By
 Submission Date: Submission Date

We regret to inform you that your response to the above PQQ has been unsuccessful and therefore you will not be progressed to the next stage of this contract. Minimum Qualification Score: 0
 Your Score: Suppliers Score

Additional Comments:

Unsuccessful Suppliers **Submitted By**

Millstream Associates Limited	Millstream Manager
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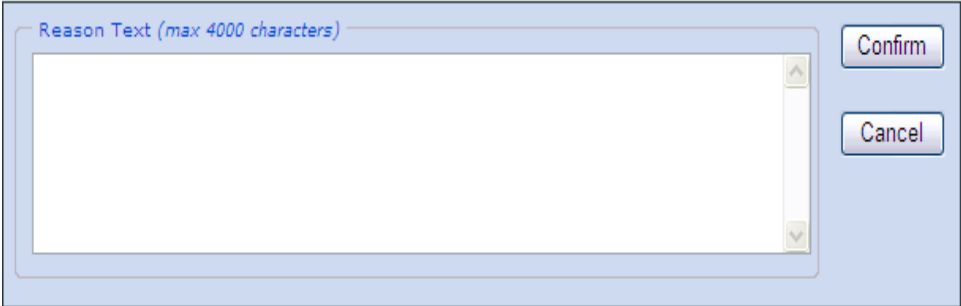
Figure 31

If the evaluator feels that none of the responses are suitable, they should leave the **Number of Suppliers** at 0 and click the **Complete Evaluation** link. This will then present them with the opportunity to close the PQQ and provide a reason why none of the responses were suitable.

PQQ Close

You have indicated that you do not wish to select any of the submitted responses for this PQQ. If there are no selected responses then all of the suppliers will be notified that they have been unsuccessful and this PQQ will be closed with no further action taken.

Please provide a reason for your decision in the area provided and *click* the **confirm** button. Alternatively, if you would like to select a supplier from the response list please *click* the **cancel** button.



Reason Text (max 4000 characters)

Figure 32