



The Restricted Procedure Stage 2 function allows contracting authorities to send out a short invitation to tender electronically to a select list of suppliers, prequalified under the restricted procedure for both OJEU and below threshold notices. The tender process can be managed online with options to attach and send documents, activate online Q&A and receive completed tender submissions online using the tender submission post box.

Authorities would use this function following the receipt of expressions of interest or PQQs from a restricted procedure notice. It is used to invite shortlisted suppliers to the tendering phase and also allows for final tenders to be submitted via the electronic post box. This keeps the entire dual stage tendering process online to help simplify and reduce the work load for both purchasers and suppliers, while maintaining fairness and integrity for all parties.

The Restricted Procedure Stage 2 notice is not published in the public domain. It is only visible within the Authority's Stage 2 Control Panel and the interest list of those suppliers selected to tender. A Stage 2 notice is represented by the red and white symbol:

### Stage 2 Control Panel Page

#### Stage 2 Control Panel

The Restricted Procedure Stage 2 function allows contracting authorities to send out a short invitation to tender electronically to a select list of suppliers, prequalified under the restricted procedure for both OJEU and below threshold notices. The tender process can be managed online with options to attach and send documents, activate online Q&A and receive completed tender submissions online using the tender submission post box.

To find out more about the Restricted Stage 2 function, view the **Stage 2 Notice** guide on the [User Guides help page](#).

#### My Stage 2 Notices

- [My Unpublished Stage 2 Notices](#)
- [My Published Stage 2 Notices](#)

#### Authority Stage 2 Notices

- [Authority Unpublished Stage 2 Notices](#)
- [Authority Published Stage 2 Notices](#)

## How to Create a Stage 2 Notice

A Stage 2 notice can only be created once the deadline for the first stage notice has passed. To create a Stage 2 notice you must access your Published Notice Workspace in the Purchasers>Authority Control Panel, click on the original Stage 1 notice title in your published notice list to generate the Notice Status page.

A new box will appear on the Notice Status page entitled "Restricted Procedure Stage 2" with the option to "Continue".



Published Stage 1 Notice Status Page

Notice Status

Restricted Procedure Stage 2

This Restricted Procedure notice has passed the deadline date for expressions of interest and the second stage of the Restricted Procedure process is now available. Click Continue to create and send invitations to tender to short listed candidates.

Continue

Notice Wizard Details

Document ID: 190239 View the original text
Title: 5 bespoke chairs
Type of Document: OJEU Notice
Type of Notice: Contract Notice
Services/Supplies: Supply Contract
Procedure Type: Restricted Procedure
Is Accelerated: No
Document Source: OJEU Wizard
Status: Dispatched
Created: 11/08/2011 16:14 by Administrator Administrator
Last Amended: 11/08/2011 16:19 by Administrator Administrator
Released: 11/08/2011 16:19

Copy

Award

On clicking "Continue" you will be taken to the outset of Stage 2 Notice creation where you can work through each question by using the "Next" button or by using the drop down menu "Jump To".

On clicking "Continue" the notice is saved to your Unpublished Stage 2 Notice workspace where you can edit and store the Stage 2 notice in the same fashion as standard notices. The answer to each question is stored when the "Next" or "Save" buttons are clicked and you can stop at any point during the process and return later to complete all of the questions.

Note: You can only create one Stage 2 Notice per Contract Notice. Once you have created a Stage 2 Notice from a Contract Notice the "Continue" option will disappear. You can only create a new Stage 2 Notice by deleting an existing unpublished Stage 2 notice or cancelling a distributed one.

Outset of Stage 2 Notice Creation – Edit Restricted Stage 2 Notice page

Edit Restricted Stage 2 Notice

Please update the notice details.

Jump to: Stage 2 - Purchasing authority details

Stage 2 Details

Descriptive title: 5 bespoke chairs
Type of Notice: Stage 2
Nature of Notice: Supply Contract

Next

Cancel



The Stage 2 notice is made up of the following Questions:

**Purchasing authority details**

These are copied over from the original notice.

**Contract Title**

This is copied over from the original notice.

**Description of the Contract Requirements**

This is copied over from the original notice.

**Total Quantity or Scope**

Insert details of the quantity or scope of the contract.

**Deadline for submission of Tenders**

The deadline for completed tenders to be returned. If using the electronic post box this will be the deadline the post box closes.

**Additional Information**

A free text box for any supplementary information.

**Additional Options**

Here you must select whether you want to use the electronic post box for receipt of tenders. You can also use the Questions and Answers and Additional Documents function.

**Administrator Access**

Select the members of the authority who require the ability to edit and add further information to the notice once it has been distributed.

**Additional Documents (if option selected)**

Upload all documents to be distributed to the suppliers. Documents should be no more than 10Mb each.

**Questions and Answers (if option selected)**

Select the main administrative contact who will be responsible for receiving and responding to questions.

**Tender Postbox Opener (if option selected)**

Select the user(s) to open the tender post box and download the tender responses. Users must have "Opener" access in order to be selected here. For further information see the Post Box user guide.

Once you have answered all the relevant questions Stage 2 Notice creation is complete and you have the option to preview it, distribute it or return to your notice workspace.



## How to Distribute a Stage 2 Notice

When you are ready to distribute the Stage 2 notice you must click the “Distribute the Notice” link to start the distribution process:

### Restricted Procedure Stage 2 Creation Complete page

#### Restricted Procedure Stage 2 Creation Completed

Congratulations, you have completed the data entry for the following Restricted Procedure Stage 2:

190221 - 5 bespoke chairs

**Note:** The Restricted Procedure Stage 2 will not be published until you release it for distribution.

You can now carry out the following actions:

- [Preview the notice.](#)
- [Distribute the notice.](#)
- [Return to your notice list and publish later.](#)

Alternatively, if you are returning to the Stage 2 Notice from your Unpublished Stage 2 Notices list in your Stage 2 Control Panel, click on the title of the Stage 2 Notice and then the “Publish” button.

### My Unpublished Stage 2 Notice Status Page

#### My Unpublished Stage 2 Notices

[Stage 2 Control Panel](#) > My Unpublished Stage 2 Notices

Detailed below is a list of your Stage 2 Notices awaiting publication. *Click* a notice title to view further information.

1 entries found. [Navigation icons] Page 1 of 1 [Go]	
Title	Created
<a href="#">5 bespoke chairs</a>	11/08/2011



Stage 2 Notice Status page – Unpublished Notice List

Stage2 Notice Status

Notice Wizard Details

**Document ID:** 190221 [View the original text](#)  
**Title:** 5 bespoke chairs  
**Type of Document:** Restricted Stage 2  
**Type of Notice:** Stage 2  
**Services/Supplies:** Supply Contract  
**Procedure Type:** Dual stage procedure  
**Is Accelerated:** No  
**Document Source:** OJEU Wizard  
**Status:** Not Released  
**Created:** 11/08/2011 16:29 by Administrator Administrator  
**Last Amended:** 11/08/2011 16:31 by Administrator Administrator  
**Released:**  
**Original Notice:** [View the Original Notice](#)

Edit

Delete

Publish

You will then be directed to the Stage 2 Distribution Page where you will select the suppliers that you want to invite to tender.

If you have used the electronic post box for the first stage notice then a list of all suppliers who submitted a response will be presented to you in the "Postbox Responses" tab, in the "Distribution List" box.

Stage 2 Details page Distribution List – Post Box Responses Tab

Distribution List

Postbox Used

There were 2 Postbox responses dispatched in the original notice.

[Distribution List](#) [Postbox Responses](#) [Search For Suppliers](#)

Below is a list of all the suppliers who can be added to the distribution list. Select the suppliers you wish to add then click Add.

- Riverside interiors**  
Andrew Bay - Supplier2@Riversideinteriors.com
- Lisa's Design Services**  
Lisa Duncan - Supplier3@Lisadesigns.com

Add

To add suppliers you wish to invite to tender to the distribution list you must tick the box to the left hand side of the supplier name and click "Add". You can add multiple suppliers at one time.

Each supplier you add is listed in the distribution list tab. If you wish to remove someone from the distribution list you can click "delete" next to their name.

Stage 2 Details page Distribution List – Distribution List Tab



### Distribution List

#### Postbox Used

There were 2 Postbox responses dispatched in the original notice.

[Distribution List](#)

[Postbox Responses](#)

[Search For Suppliers](#)

[Delete](#) Andrew Bay - Supplier2@Riversideinteriors.com

[Delete](#) Lisa Duncan - Supplier3@Lisadesigns.com

If there are suppliers you wish to add who did not submit to the electronic post box in the first stage notice you can search for them using the “Search For Suppliers” tab. Type the company name into the “Search for” field and click “Search”.

### Stage 2 Details page Distribution List – Search for Suppliers Tab

### Distribution List

#### Postbox Used

There were 2 Postbox responses dispatched in the original notice.

[Distribution List](#)

[Postbox Responses](#)

[Search For Suppliers](#)

Enter a **company** name in the box below to search for suppliers. Select the suppliers you wish to add then click Add.

Search for:



**Riverside Design**

Francis Boyle - Francisboyle453@gmail.com

Once you are happy with the distribution list, click “Distribute” in the “Stage 2 Details” box.



### Stage 2 Details page Stage 2 Notice – Distribute Restricted Procedure Stage 2

#### Distribute Restricted Procedure Stage 2

This page will allow you to distribute your Restricted Procedure Stage 2 Notice to one or more suppliers. Below are details of the Stage 2 Notice. To distribute the notice you must add suppliers to the distribution list.

##### Stage 2 Details

**Title:** 5 bespoke chairs  
**Type of Notice:** Stage 2  
**Nature:** Supply Contract  
**Deadline:** 24/08/2011 12:00:00

[Distribute](#)  
[Cancel](#)

##### Distribution List

**Postbox Used**  
 There were 2 Postbox responses dispatched in the original notice.

[Distribution List](#) | [Postbox Responses](#) | [Search For Suppliers](#)

[Delete](#) Andrew Bay - Supplier2@Riversideinteriors.com  
[Delete](#) Lisa Duncan - Supplier3@Lisadesigns.com

Clicking "Distribute" will send an e-mail to all suppliers on the list informing them of the Invitation to Tender and asking them to log into the site to accept or decline the invitation. The Stage 2 notice will automatically be added to the selected supplier's Interest List.

**Note:** The e-mail address in the "from" field of this e-mail is marked as your own therefore any direct responses to the e-mail will be sent to your registered e-mail address. This may include "Out of Office" replies or "Undeliverable email" messages which will notify you the supplier may not have received the e-mail. If you receive notification of this nature please follow this up with the supplier and, if necessary, the Support Desk.

### Administering a Distributed Stage 2 Notice

Once distributed, the Stage 2 notice will be added to your Published Stage 2 Notice Workspace from where the Administrators selected during notice creation can access and administer it.

#### My Published Stage 2 Notice Status Page

##### My Published Stage 2 Notices

[Stage 2 Control Panel](#) > My Published Stage 2 Notices

Detailed below is a list of your published Stage 2 Notices. *Click* a notice title to view further information.

2 entries found. [Navigation icons] Page 1 of 1 [Go]

Title	Deadline	Published
<a href="#">5 bespoke chairs</a>	24/08/2011	11/08/2011



**As with a standard notice you can:**

- Change the deadline
- Cancel the notice
- Add additional information
- Add additional documents
- Respond to Questions and Answers
- Access the electronic post box

All updates made to the notice will be communicated to the distribution list by e-mail.

You can also add suppliers to the distribution list after you have dispatched the notice.

**Published Stage 2 Workspace – Stage 2 Notice Status View**

**Published Details**

**Tender ID:** DEC080160  
**Action:** [View Published Stage 2 notice](#)  
[Change Stage 2 Deadline](#)  
[Cancel Stage 2](#)  
**Title:** Architect Services  
**Published:** 19/12/2011 16:02 by Peter Wilson  
**Type of Notice:** Stage 2  
**Tender Deadline:** 21/12/2011 at 12:00:00  
**Archived Date:** -  
**Visible On Site:** No  
**Distribution List:** 3 supplier(s) currently in distribution list  
[View Distribution List](#)  
[View access to distribution list](#)  
[Add supplier to distribution list](#)

**Additional Notice Options**

Listed below are the additional options available for this notice.

<b>Additional Information:</b> 0 update(s)	<a href="#">View/Change List of Additional Information</a>
<b>Additional Documents:</b> 1 document(s)	<a href="#">View/Change Additional Document List</a>
<b>Question and Answers:</b> 0 question(s)	<a href="#">View Questions and Answers</a>
<b>Postbox:</b> 0 response(s)	<a href="#">View Submission Postbox</a>

**View Stage 2 Distribution List**

By clicking on “View Distribution List” you can see a list of suppliers you have invited to tender. You will also see whether they have accepted or declined the invitation to tender. In the example below one supplier has confirmed they will submit a bid, one has declined and four have not responded. You may wish to contact the suppliers who have yet to respond to ensure they have received the e-mail.

**Published Stage 2 Notice – Suppliers on Distribution List page**



### Restricted Procedure Stage 2 Supplier Responses

Below is a list of the suppliers who are on the distribution list for the second stage of Restricted Procedure 190381. The list shows each supplier, if the authority has recorded a response and the status of the supplier confirmation. Please click 'Supplier' Name to add a manual response for a particular supplier.

[Return to notice status](#)

#### Suppliers on Distribution List

Id	Supplier	Company	Manual Bid	Confirmation	Invited On	Invited By
287	<a href="#">adrian sloan</a>	Millstream	No	Confirmed	19/12/2011 16:14	Duncan Dallas
288	<a href="#">karen bothwell</a>	Millstream	No	Declined	19/12/2011 16:14	Duncan Dallas
267	<a href="#">Duncan Dallas</a>	DD Cleaning Services	No	No Response	19/12/2011 16:11	Peter Wilson
286	<a href="#">Percy Postlethwaite</a>	PP Paper Ltd	No	No Response	19/12/2011 16:02	Peter Wilson
266	<a href="#">May Macaulay</a>	Stationery Ink Ltd	No	No Response	19/12/2011 16:02	Peter Wilson
285	<a href="#">Lauren Lundstad</a>	Viking Paper Ltd	No	No Response	19/12/2011 16:02	Peter Wilson

#### Recording a Manual Response

If responses are not being received in the electronic post box you may wish to record a manual submission by clicking on the relevant supplier name and adding the date and time their response was received, along with any additional comments.

For guidance on how to use the electronic post box please refer to the relevant user guide.