Procurement Depository

Public Body User Guide

Version 1.0

Table of Contents

1.0 The Procurement Depository 4

1.1 Access and Best Use 4

1.2 Getting Started 4

1.3 Data Entry Standards 7

1.4 Navigating the System 8

1.5 Help and Support 9

2.0 Company Information 10

2.1 Details 10

2.2 Addresses 11

2.2.1 Add Public Body Address 11

2.3 Users 13

2.4 Change Requests 13

3.0 Company Documents 15

3.1 Documents 15

3.1.1 How to Upload and Assign Documents 15

3.1.2 List of Uploaded Documents 19

4.0 Suppliers 19

4.1 Lines of Business 19

4.1.1 How to Add a Line of Business 20

4.1.2 How to View/Delete a Line of Business 24

4.2 Awaiting Qualification 26

4.2.1 How to Pre-Qualify Suppliers/Contractors 26

4.3 Ranked Suppliers By Line of Business 28

5.0 Settings 29

5.1 Manage My Profile 29

5.1.1 About Me 30

5.1.2 Organisation 33

5.1.3 Edit Security Questions 33

5.2 Reset My Password 36
6.0 Glossary of Terms 37

1.0 The Procurement Depository

The Procurement Depository (also referred to as "the Depository") is a web application designed to capture, manage and report on information as described in Trinidad and Tobago's Public Procurement and Disposal of Public Property Act 2015, as amended, ("the Act").

1.1 Access and Best Use

The Depository can be accessed via https://depository.oprtt.org/ .

For the best experience using this system, access the Depository by copying and pasting the above link in a new web browser using either Microsoft Edge or Google Chrome.

1.2 Getting Started

The Depository is to be used by Public Bodies and Suppliers/Contactors who wish to provide goods, works, and/or services to Public Bodies of Trinidad and Tobago. This document will guide Public Bodies on using the Depository, completing and managing their profile information, and reviewing Suppliers' Pre-Qualification requests. For more information click here to view the General Guideline on Pre-Qualification & Pre-Selection or visit our Resource Centre (oprtt.org) for additional resources.

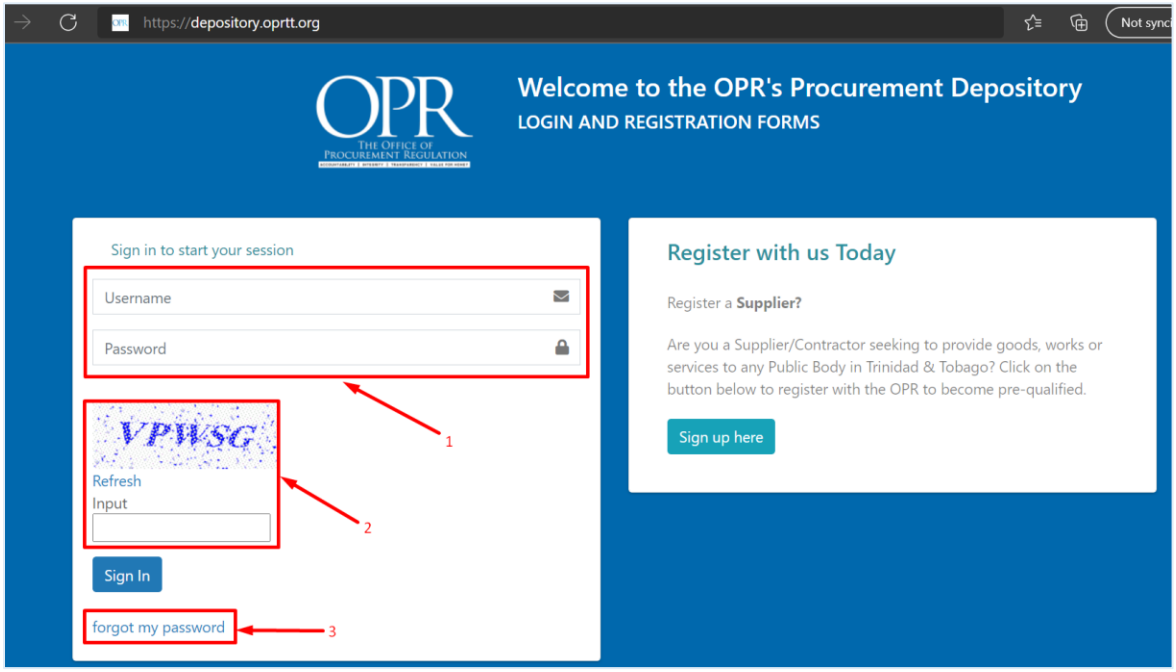


Figure 1.0 Procurement Depository Landing Page

1. Enter the credentials emailed to you from the OPR, here for your account. If you have not received your account credentials, please contact the OPR from any of the options in section 1.5 Help and Support.
2. Captcha must be entered to sign in.
3. If you forgot the password to your account, please click on this link to reset your password

NOTE: Failure to Sign-In after three (3) unsuccessful attempts will result in your account being temporarily ***locked for one (1) hour****. Please contact the OPR via section* **1.5 Help and Support** *for assistance.*

Upon successfully providing valid account credentials and captcha, you will be prompted with one (1) of your three (3) security questions to be answered.

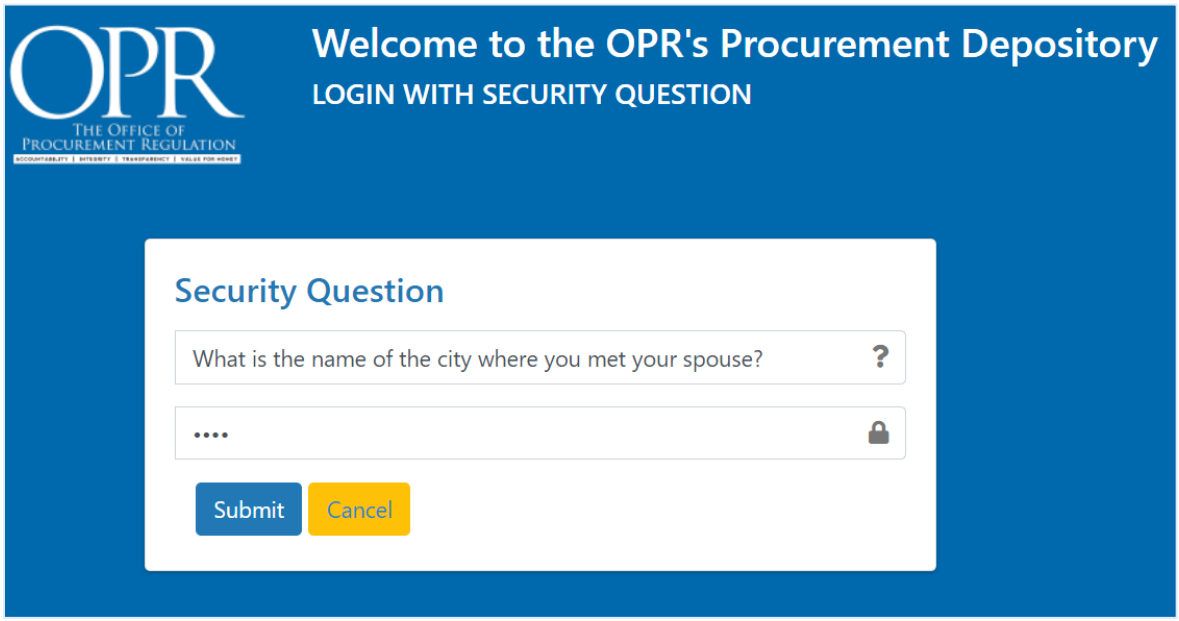


Figure 1.1 Security Questions page

You will then be prompted to review and accept all policies listed before you can use the Depository.

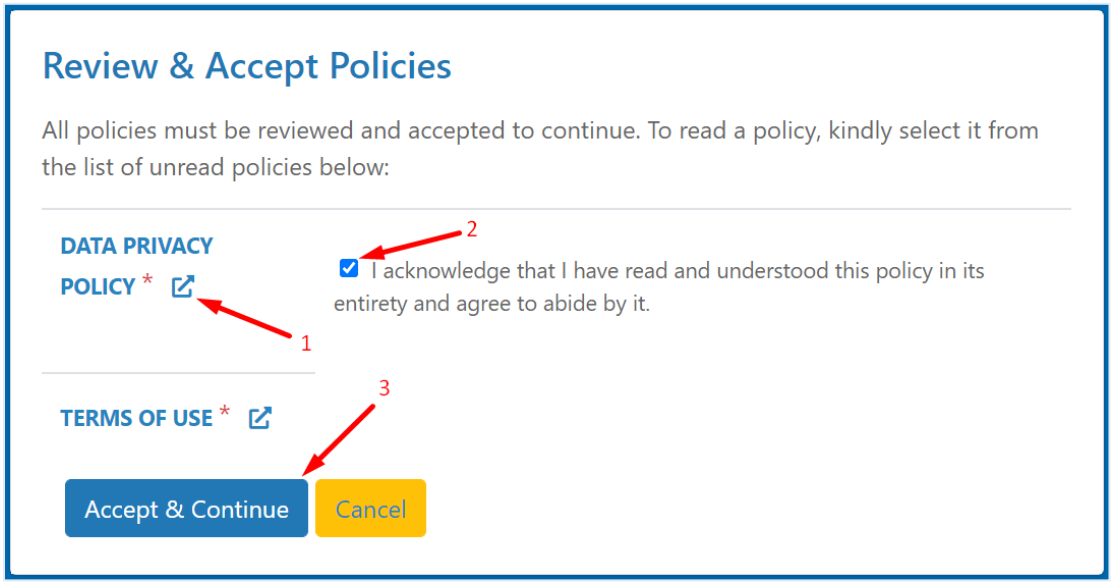


Figure 1.2 System Policies page

1. Click here first to open the policy document in a new browser tab. You can review or download from here, if you wish.
2. This checkbox will then appear and must be checked if you wish to continue to the depository.
3. If you have checked all policies and wish to proceed, please click Accept & Continue. Otherwise, click Cancel to return to the login screen.

NOTE: All policies listed must be checked before you are able access the Depository system for use.

1.3 Data Entry Standards

Information entered into the Depository, will be reviewed and evaluated during the pre-qualification process, by Public Bodies in Trinidad and Tobago, to ensure the data entered is accurate and fulfil the due diligence requirements set out in Section 29(1) of the Act.

A few data entry standards are inexplicitly expressed in the Depository system, these include:

Phone Number

All contact phone numbers entered in the system should include your country code.

Currency

All instances of monetary values in the system should be in Trinidad and Tobago Dollars ("TTD") and exclusive of Value Added Tax ("VAT"). In the case where you must convert your currency to TTD, please use the Central Bank rates of exchange. URL: https://www.central-bank.org.tt/

Red Asterisk *

Throughout the system, you will encounter red asterisks next to field labels. This indicates that the field is required (data must be provided) to save the record.

List Items (Drop-down Lists)

Throughout the system, you will encounter various pre-populated drop-down list fields that would require you to select an option. These lists are not exhaustive and if you do encounter a list where your preferred option

is not available for selection, do contact us at support@opr.org.tt with the name of the list and the option you would like added on. Upon internal review, we will contact you and let you know the outcome.

1.4 Navigating the System

The Depository implements sidebar menu navigation as well as the selection of icons. In various sections of the system, you will be able to view, edit, or delete data via clickable links on the View | Edit | Delete record:

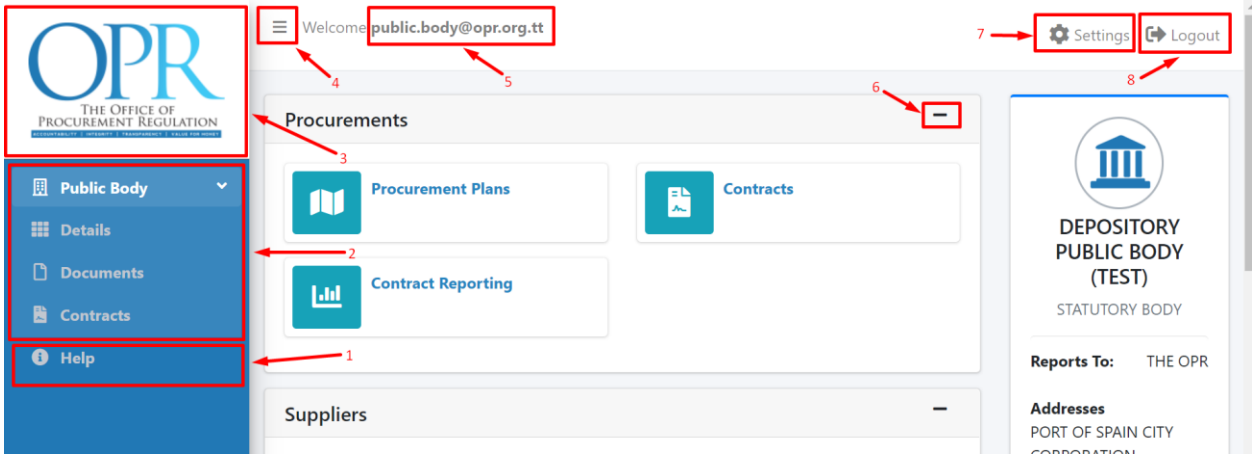


Figure 1.3 Navigation Breakdown

1. Click here to be taken to the OPR website Depository information page
2. Quick navigation links to various sections of your profile
3. Click on the OPR Logo to go to the Depository page of the OPR's website
4. Click here to expand and collapse the Sidebar Navigation Pane
5. Username of the user currently logged in to the Depository
6. Click here to expand and collapse sections of the Dashboard
7. Click here to expand and collapse the 'Settings' Dashboard
8. Click here to Logout from your session

1.5 Help and Support

For additional help and support on the Depository:

Visit	:	https://oprtt.org/procurement-depository
Email	:	support@opr.org.tt
Call	:	1-868-627-4677 or 1-868-226-4677

2.0 Company Information

This section captures various information relating to the public body details, addresses, and users.

2.1 Details

This section contains general information on the public body entity. To update any information in this section, a Change Request must be submitted to the OPR.

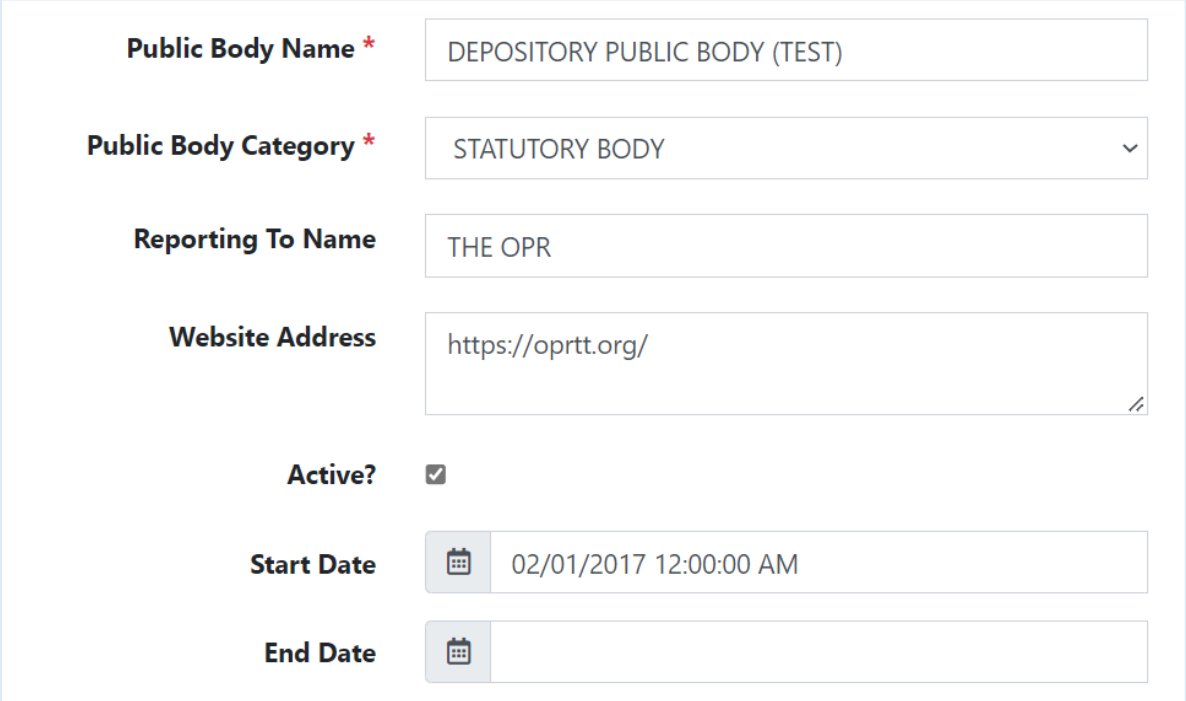


Figure 2.0 Profile Information

Public Body Name
The name of your Public Body.

Public Body Category
Identifies the type of public body.

Reporting To Name
Specifies who your public body reports to.

Website Address
The website URL for the public body webpage.

Active?
This checkbox identifies if your Public Body has been made inactive.

Start Date
The date your public body started operations.

End Date
The date your public body ended operations.

2.2 Addresses

In this section, you will be able to view the registered or head operational address information of the business or company, mailing address, and any other secondary addresses. To make a change to this section, you must submit a Change Request to the OPR.

2.2.1 Add Public Body Address

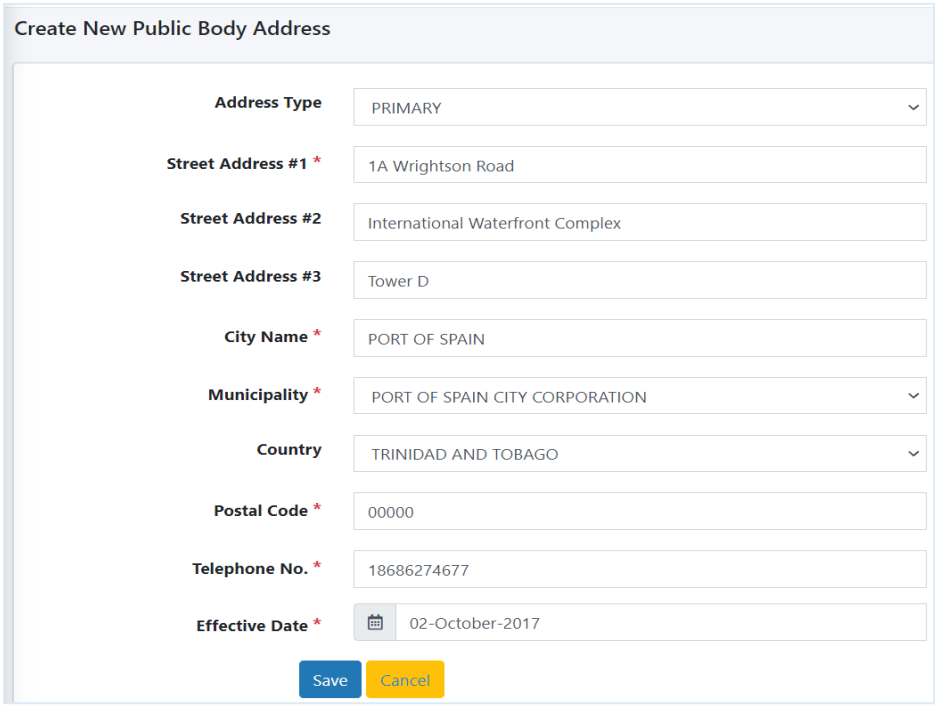


Figure 2.1 Create Address page

Address Type
Select the type of address being entered.

- PRIMARY – For the main headquarters address
- SECONDARY – Any other addresses that your public body may have
- MAILING – If your mailing address is different from your PRIMARY address

NOTE: If multiple addresses exist, there can only be one (1) PRIMARY address.

Street #1 Address
Enter street address 1 information.

Street #2 Address
Enter street address 2 information.

Street #3 Address
Enter street address 3 information.

City Name
Enter the city name of the address information.

Municipality
Select the municipal region of the address information.

Country
Select the country of the address information.

Postal Code
Enter the postal code of the address information. If one does not exist, please enter "00000" as the postal code.

Telephone No.
Enter the telephone number of the address information.

Effective Date
The date your public body started operations at this address.

2.3 Users

This section lists the users of the public body account on the depository. Users include the Named Procurement Officer (NPO) and the Accounting Officer (AO). The NPO is the primary user of the public body's account and will receive email correspondences from the Depository as it relates to any automated emails or updates, regarding the Depository from the OPR. Any changes or updates to users of your public body must be communicated to the OPR via 1.5 Help and Support. The 'Public Body Letter Template – Additional User' form must be submitted for additional users (for more information please visit section 2.4 Change Requests).

2.4 Change Requests

In this section you will be able to create requests to the OPR for updates to your public body account as it relates to the information that you are unable to access, add, edit or delete. Such as, the Details, Addresses and Users sections.
There are two (2) forms available:

1. 'Public Body Letter Template – Change Request'. This form is required to be submitted when there are changes to the Named Procurement Officer (NPO) or Accounting Officer (AO) and to sections of your profile that you do not have access to modify.
2. 'Public Body Letter Template – Additional User'. This form is required to be submitted when you are requesting additional users to your profile. E.g. A delegate for the NPO or AO.

NOTE: All forms can be found on our website Procurement Depository page.

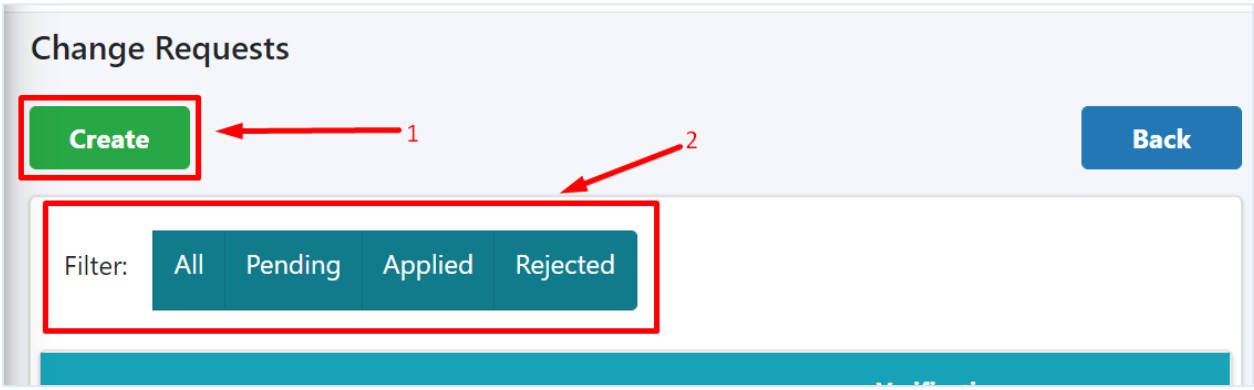


Figure 2.2 Create Change Requests

1. Click here to Create and Submit a new Change Request.

2. Click on All, Pending, Applied or Rejected to filter the listing of change requests:
    a. Pending – requests that are submitted but not yet actioned by the OPR.
    b. Applied – requests that were submitted, accepted and applied by the OPR.
    c. Rejected – requests that were submitted but rejected by the OPR. A reason will also be given for any rejections.

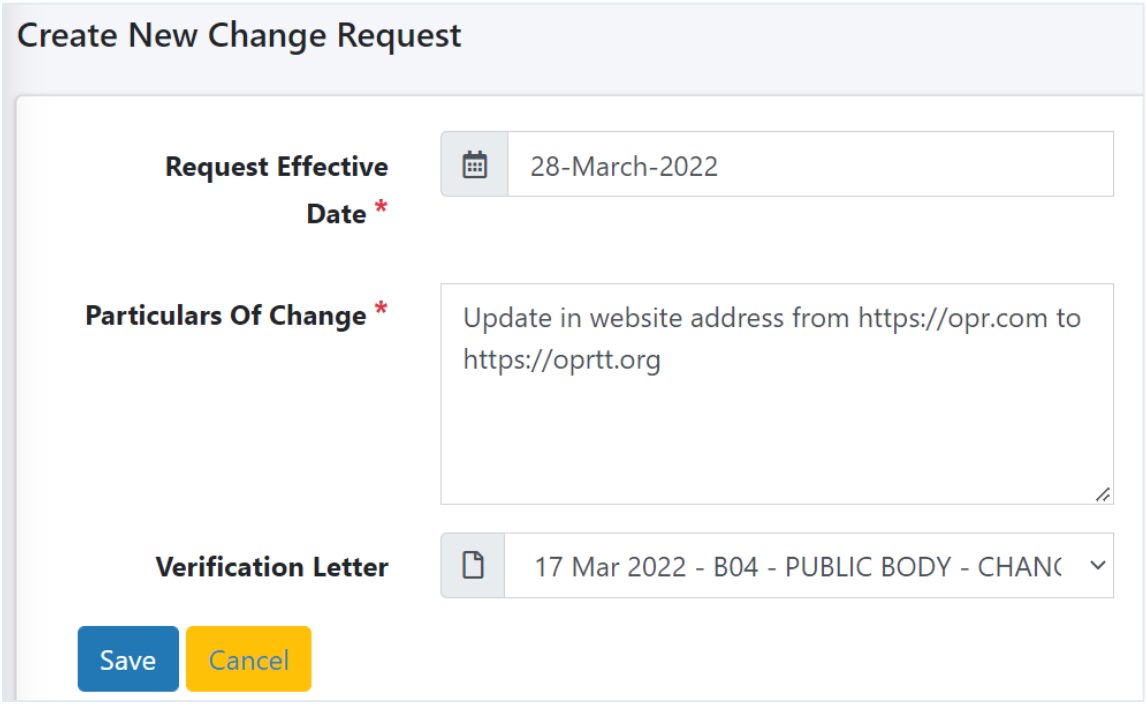


Figure 2.3 Change Request Page

Request Effective Date
Please select the date you would like this change to occur by.

Particulars Of Change
Give a brief description of the change being requested.

Verification Letter
Upload the completed 'Public Body Letter Template' form.

3.0 Company Documents

3.1 Documents

In this section, you will be able to upload and manage documents uploaded to your record.

NOTE:

1. *Only .pdf type documents are accepted*
2. *Maximum size per file is 50mb*
3. *Files larger than 50MB can be compressed*
4. *Files are not to be encrypted or password protected*
5. *Be mindful of documents which have expiration dates*

3.1.1 How to Upload and Assign Documents

Step 1. Click Add files and Select Documents to Upload

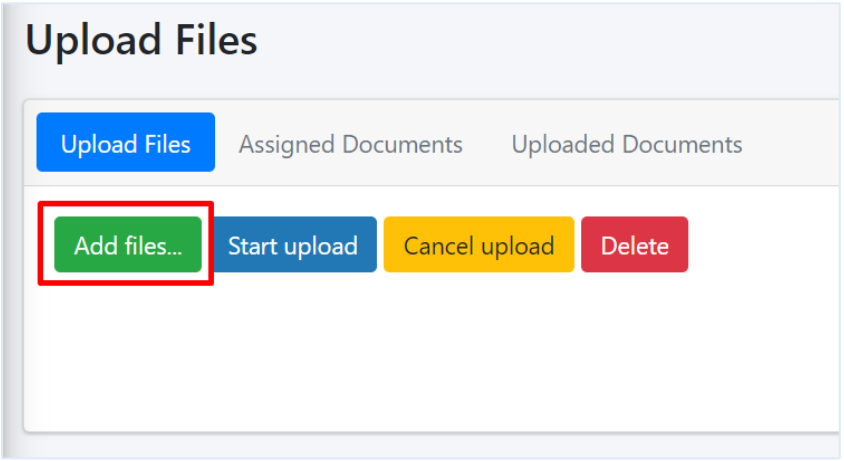


Figure 3.0 Upload Files

Step 2. Click Start Upload or Start

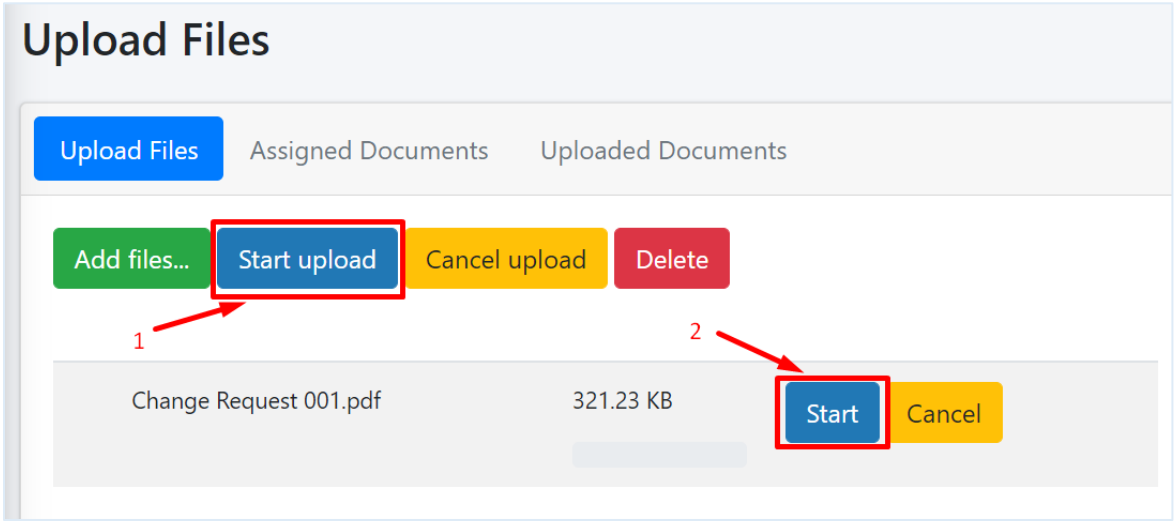


Figure 3.1 Upload Files – Start Upload

1. Clicking this button will upload all files at once
2. Click here if you wish to individually upload file

Step 3. Assign Documents

After uploading your selected documents, proceed to Assign the documents:

1. Click on Assigned Documents tab
2. Then Assign Document button

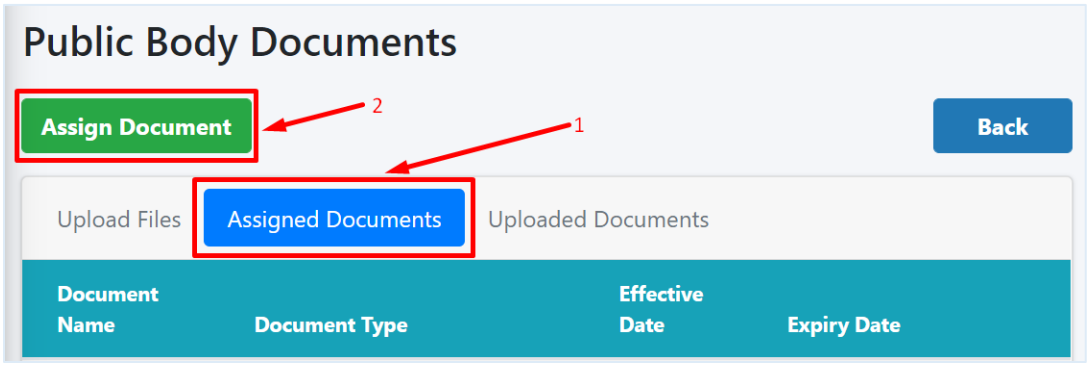


Figure 3.2 Upload Files – Assign Document

Step 4. Select Uploaded Document

Click on 'Select Document'

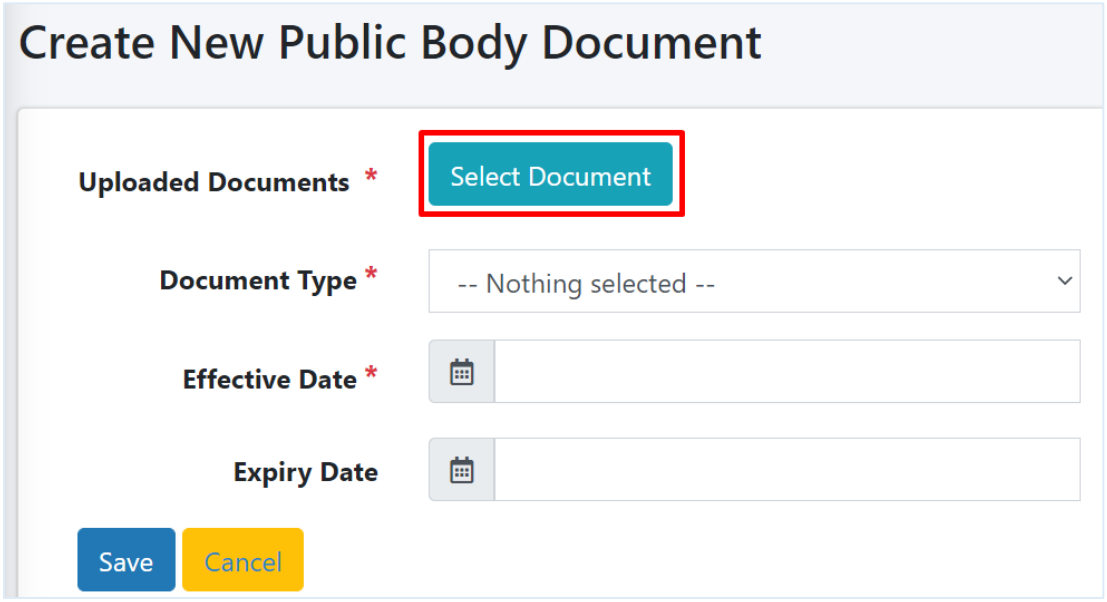


Figure 3.3 Upload Files – Select Document 1

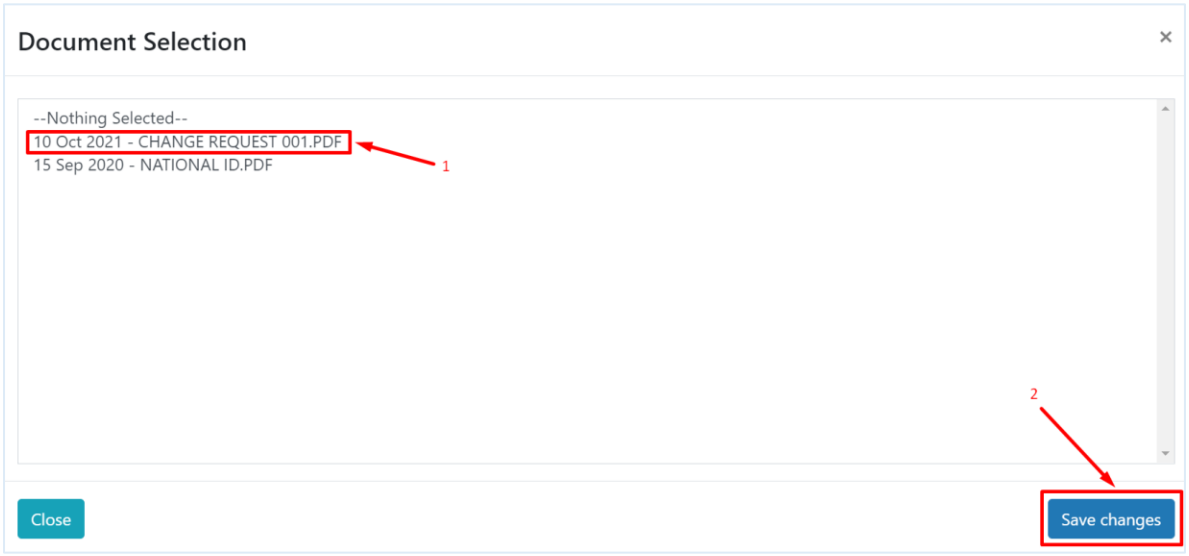


Figure 3.4 Upload Files – Select Document 2

1. Select document
2. Click Save changes

Step 5. Save Record

Click Save after the necessary information has been entered.

Figure 3.5 Upload Files – Save

Uploaded Documents
Select document that was uploaded in 2.8 Step 1.

Document Type
Select the document type you wish to assign to the selected document. Choose the document type most relevant to the document uploaded.

NOTE:

1. *If selected Document Type ends with an asterisk (*), this indicates that an expiry date **MUST** be set.*
2. *Uploaded Document may not necessarily have the same name as the Document Type.*

Effective Date
Select the date the document came into effect.

Expiry Date
Select the date the document will expire or no longer be valid.

3.1.2 List of Uploaded Documents

Click on the Uploaded Documents tab to view a summary of all documents which were uploaded into the system. Click on Download to download a copy of that document to view its contents.

> *NOTE: Documents that have not been assigned as described in 3.1.1 will be purged from the system after 30 days.*

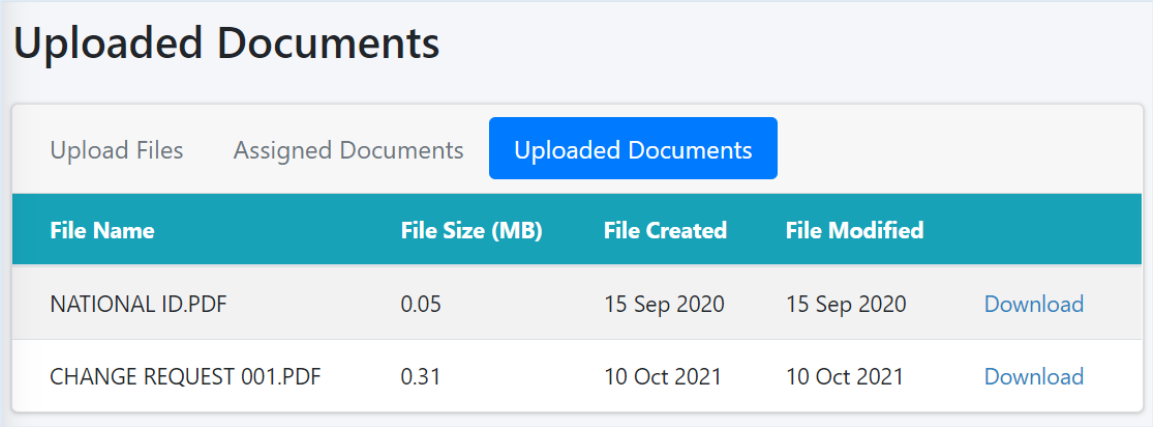


Figure 3.6 Uploaded Documents

4.0 Suppliers

4.1 Lines of Business

The Line(s) of Business ("LoB") that you can access or your Public Body is interested in can be created in this section. A Line of Business refers to any goods, works and/or services available to the Public Body. You can create as many Lines of Business that you require; as well as View/Delete existing Lines of Business. Additionally, you can prequalify Suppliers and Contractors in those Lines of Business. You must specify a Value Category for each Line of Business.

> *NOTE: A LoB cannot be edited, must be deleted and re-created if any changes must be made.*

4.1.1 How to Add a Line of Business

As a Public Body you will be presented with the United Nations Standard Products and Services Code ("UNSPSC") to select the goods, works and/or services that they are interested in. Each Line of Business consists of four (4) levels. You must navigate the hierarchy until you reach the 4th level, which is referred to as the Commodity. At the Commodity level, you will be able to select one or as many items as needed, then proceed to saving that information along with a Value Category and other information.

Step 1. Click on Lines of Business

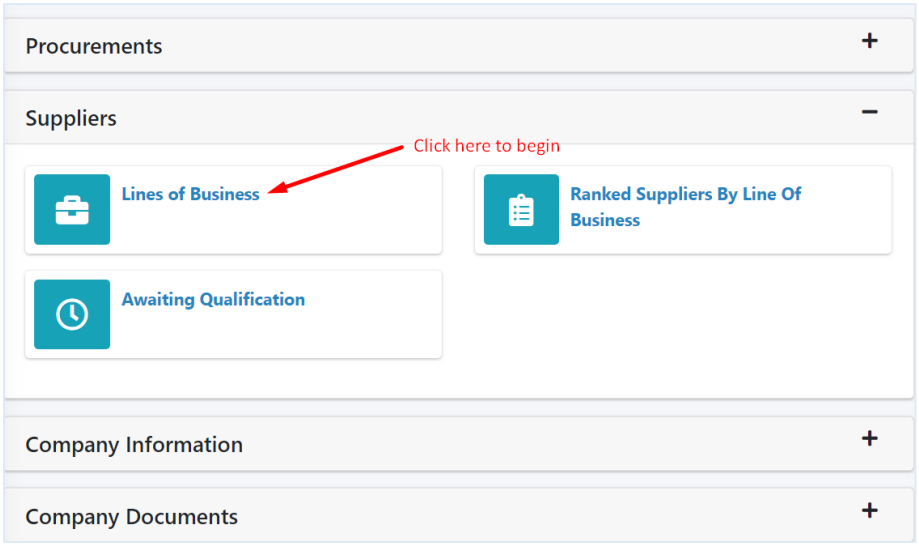


Figure 4.0 Lines of Business

Step 2. Click on Create

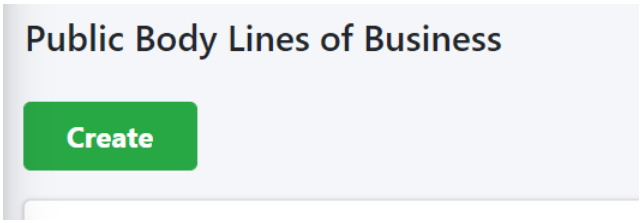


Figure 4.1 Create Line of Business

Step 3. Traverse UNSPSC Listing to the 4th Level

1st Level (Segment)

Figure 4.2 Line of Business – Level 1

2nd Level (Family)

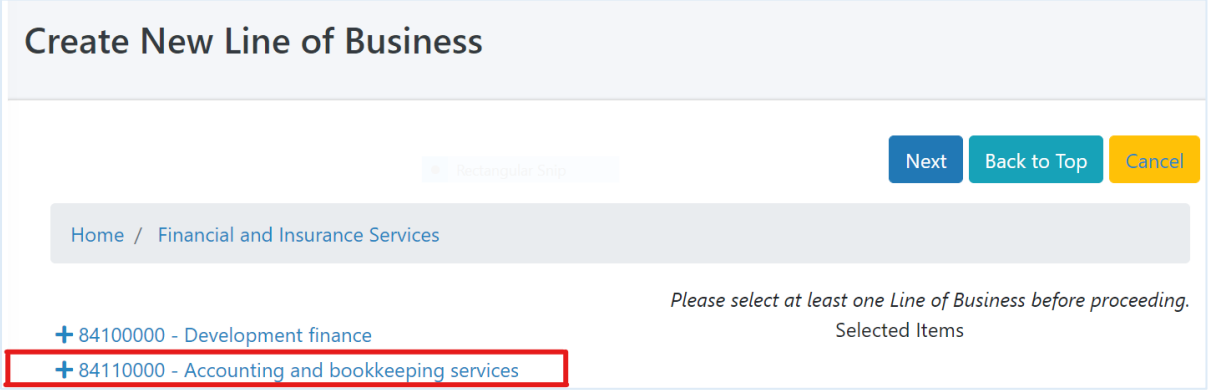


Figure 4.3 Line of Business – Level 2

3rd Level (Class)

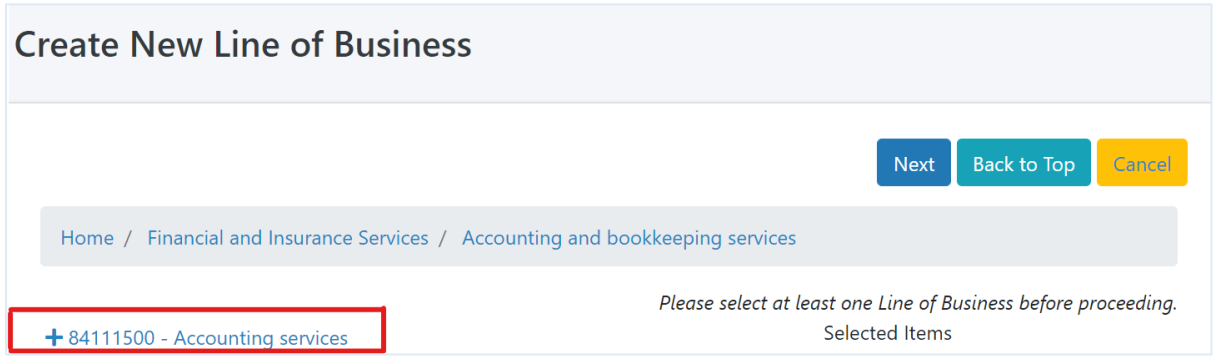


Figure 4.4 Line of Business – Level 3

4th Level (Commodity)

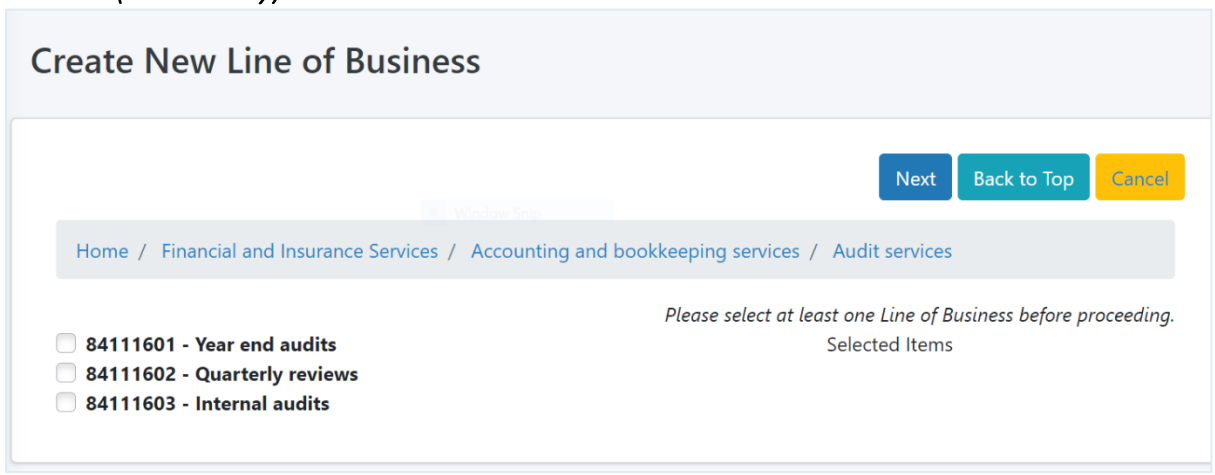


Figure 4.5 Line of Business – Level 4

Step 3. Select and Click Next

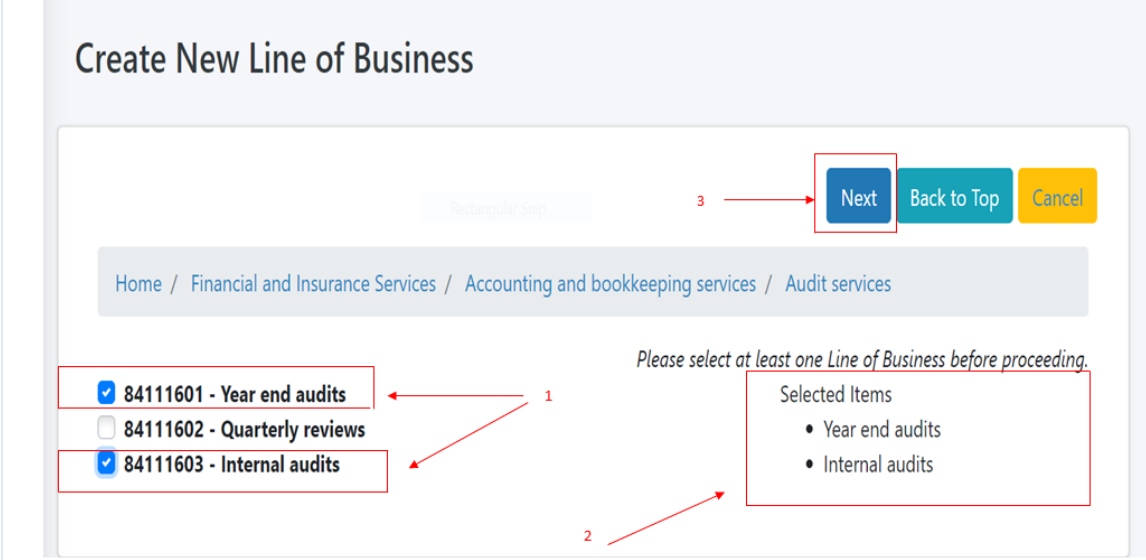


Figure 4.6 Line of Business – Level 4 Breakdown

1. Select the goods, works and/or services to be added.
2. The options that are selected will appear to the right.
3. Click on the Next button to proceed.

Step 5. Proceed to Save

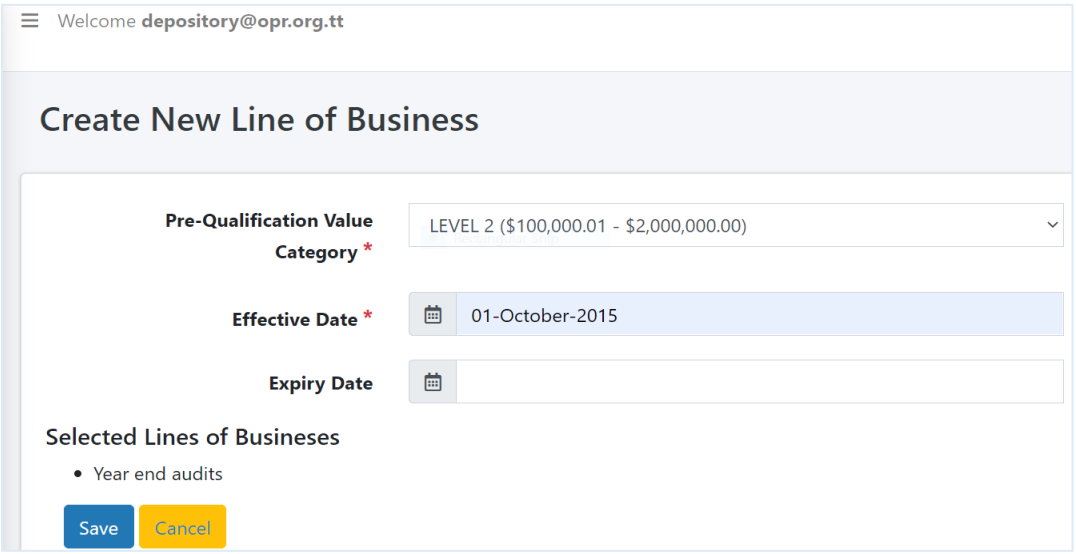


Figure 4.7 Save Line of Business page

Pre-Qualification Value Category

Specifies the highest value category range which your Public Body will likely procure for the Selected Lines of Business.

There are six (6) value categories from which to select:

1. LEVEL 1 ($0 - $100,000.00)
2. LEVEL 2 ($100,000.01 - $2,000,000.00)
3. LEVEL 3 ($2,000,000.01 - $10,000,000.00)
4. LEVEL 4 ($10,000,000.01 - $50,000,000.00)
5. LEVEL 5 ($50,000,000.01 - $100,000,000.00)
6. LEVEL 6 (>$100,000,000.00)

All values are expressed in Trinidad and Tobago Dollars (TTD) and are VAT Exclusive.

Effective Date

The first working day of the year should be selected here. E.g. 02-January-2021

Expiry Date

This field can remain blank.

Click on the Save button to add the Selected Lines of Business or click the Cancel button to return to the UNSPSC listing.

4.1.2 How to View/Delete a Line of Business

On the Lines of Business page, there are options to View and Delete a Line of Business, if desired. Upon clicking the Delete button, a warning prompt will appear. To proceed, click on the Confirm Delete button.

Step 1. Click Delete

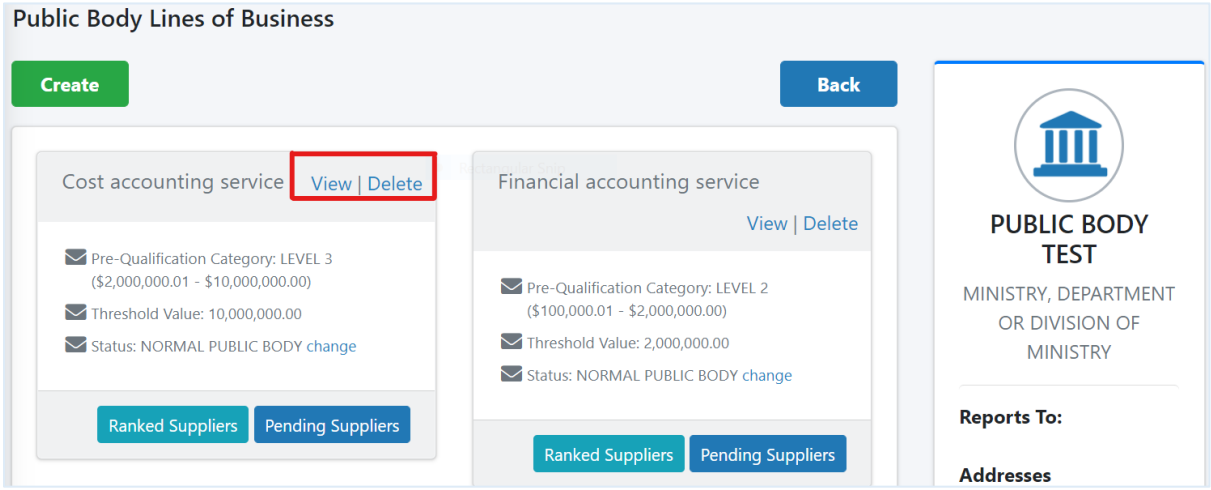


Figure 4.8 View | Delete Line of Business

Step 2. Warning

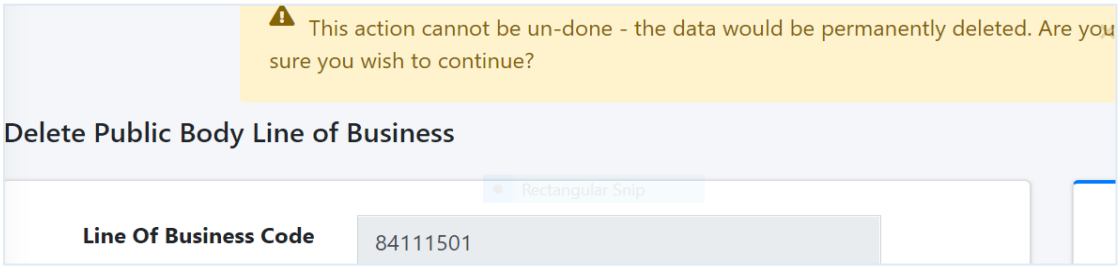


Figure 4.9 Delete Line of Business prompt

Step 3. Proceed to Delete

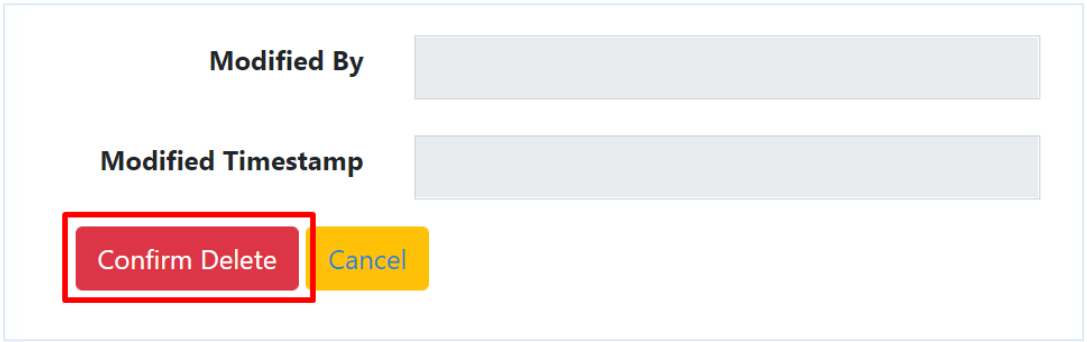


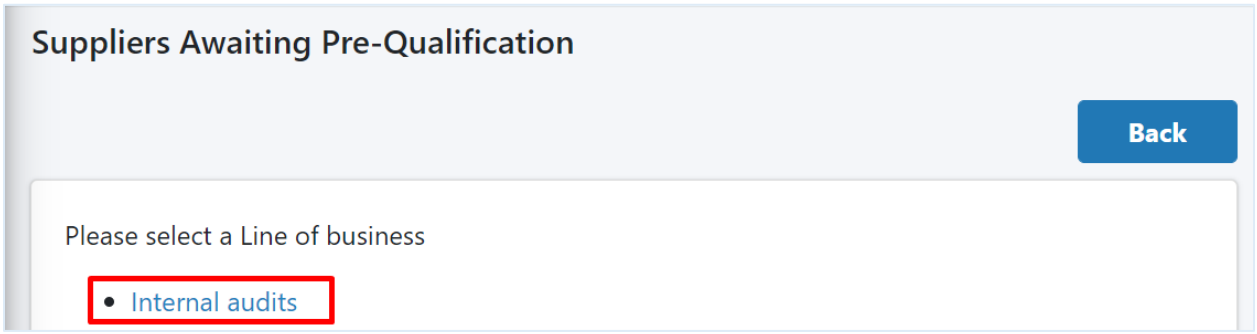
Figure 5.0 Confirm Delete Line of Business page

4.2 Awaiting Qualification

In this section you are able to view Suppliers/Contractors who are awaiting pre-qualification for the selected lines of business. You will have the ability to review these suppliers' profiles and either accept or reject their requests.

4.2.1 How to Pre-Qualify Suppliers/Contractors

Step 1 – Select Line of business



5.1 Awaiting Pre-Qualification Lines of Business page

Step 2 – Select pending supplier/contractor request for review

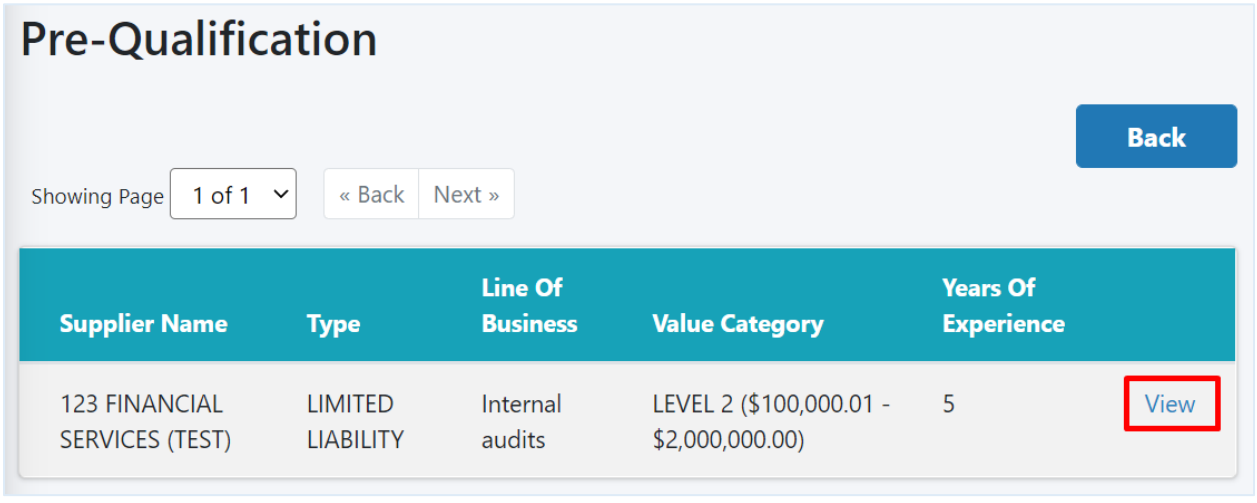


Figure 5.2 Suppliers Awaiting Pre-Qualification pages

Step 3 – Select Reserve to begin the review process

You will be shown a summary of the supplier/contractor details. You can then proceed to perform actions as highlighted below:

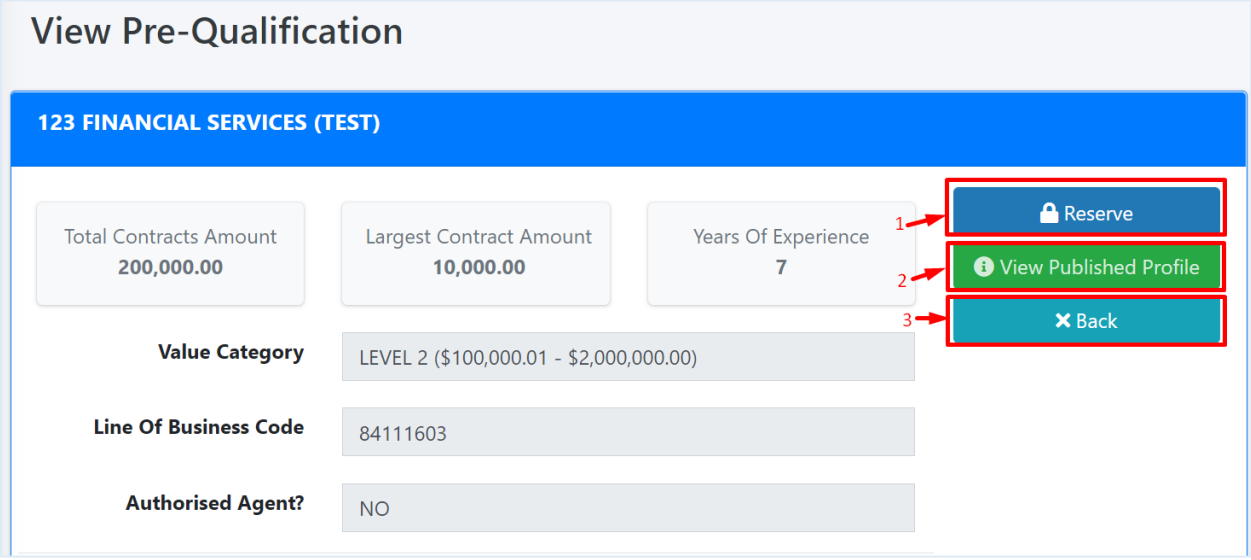


Figure 5.3 Pre-Qualification Summary page

1. **Reserve** – Selecting "Reserve" will lock the pre-qualification request to your public body. No other public body will be able to review this supplier/contractor request. The supplier/contractor will be notified via email that you have undertaken their request.

NOTE: You will have 30 days to complete the review of this request. If 30 days elapses, the request will automatically be Released.

2. **View Published Profile** – Click here to view the supplier/contractor's full profile. This will open a new tab in your browser with the supplier/contractor's profile.

3. **Back** – Click here to go back to the previous page

Step 4 – Accept or Reject request

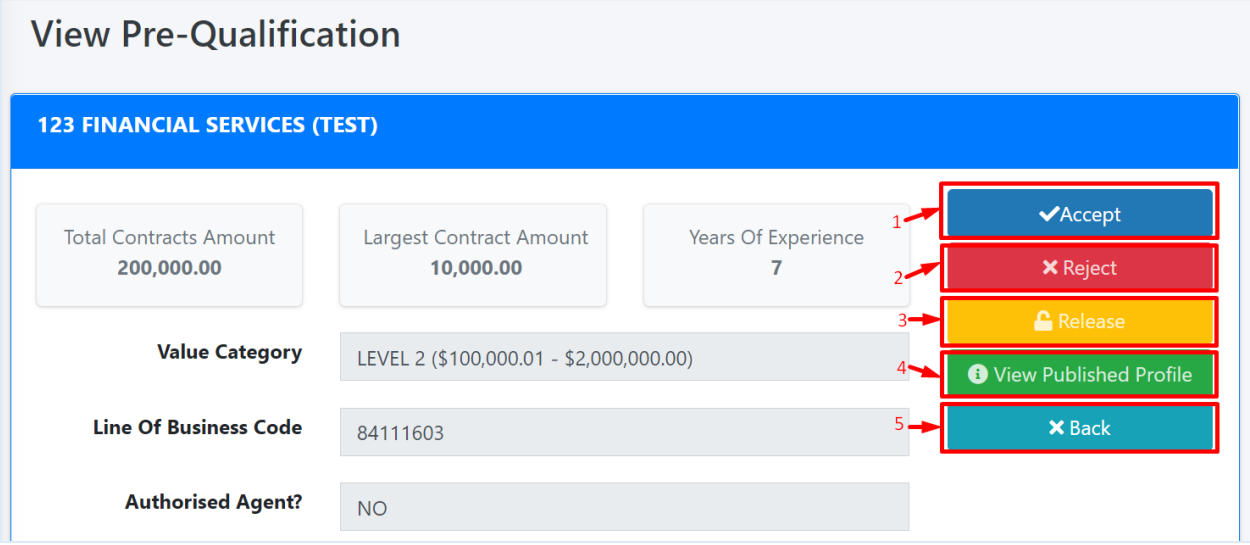


Figure 5.4 Pre-Qualification reserved request page

1. **Accept** – If you have reviewed, and are confident that the supplier/contractor has met the criteria to be pre-qualified, you can then proceed to Accept the request and confirm the supplier/contractor as pre-qualified for this line of business
2. **Reject** – If the supplier/contractor has not met the criteria to be pre-qualified, you can Reject this request and provide the reason why they were rejected, as well as advisory notes as to why this request would not have been accepted for pre-qualification.
3. **Release** – this will release the supplier/contractor's request to an open state for any other public body to Reserve this request.
4. **View Published Profile** – Click here to view the supplier/contractor's full profile. This will open a new tab in your browser with the supplier/contractor's profile.
5. **Back** – Click here to go back to the previous page

4.3 Ranked Suppliers By Line of Business

This section provides a ranked listing of suppliers/contractors who have published their profile for the selected lines of business. The ranking is based on pre-qualification Value Category. Suppliers/Contractors who are an exact match to your selected value category will appear to the top of the listing.

5.0 Settings

In this section, you can manage your account profile information.

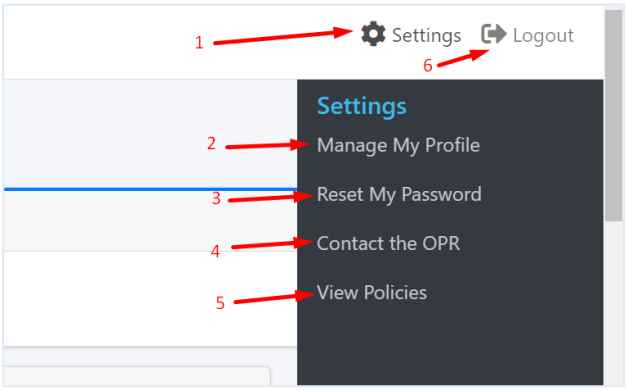


Figure 6.0 Settings menu

1. Click here to open the Settings sidebar.
2. Click here to edit basic user information and security questions.
3. Click here to reset the account password.
4. Click here to email the OPR.
5. Click here to review system policies.
6. Click here to logout from the Procurement Depository.

5.1 Manage My Profile

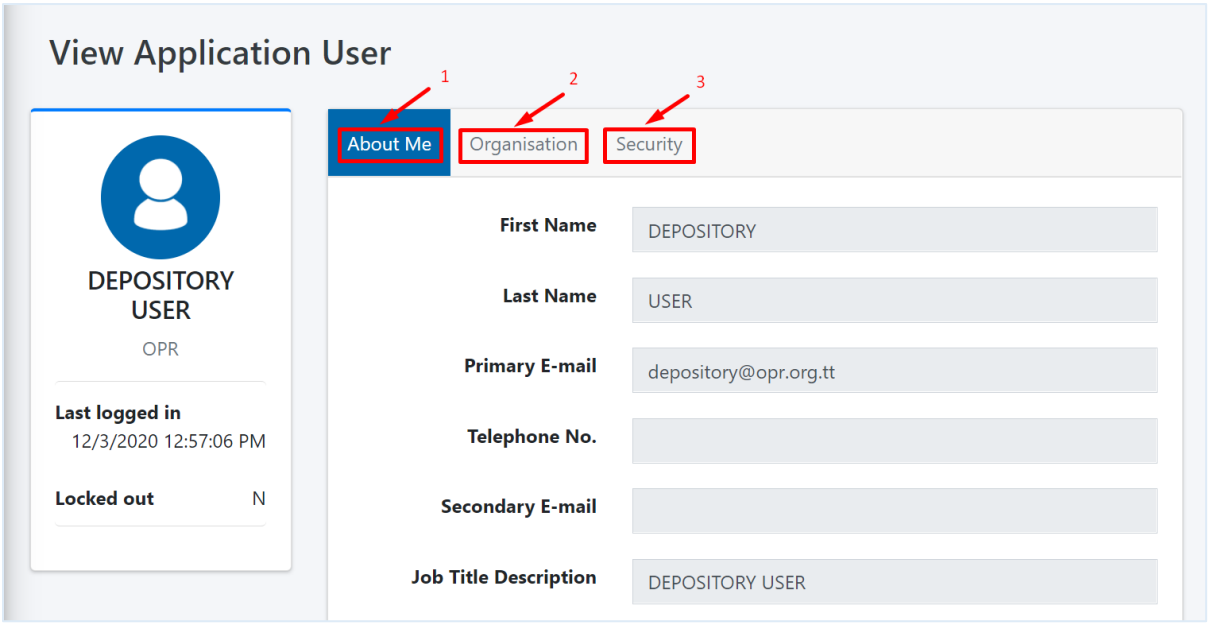


Figure 6.1 Application User Screen

1. Click here to edit basic user information.
2. Click here to view information on the organisation.
3. Click here to edit security questions.

5.1.1 About Me

This section allows you to edit some of your basic user profile information.

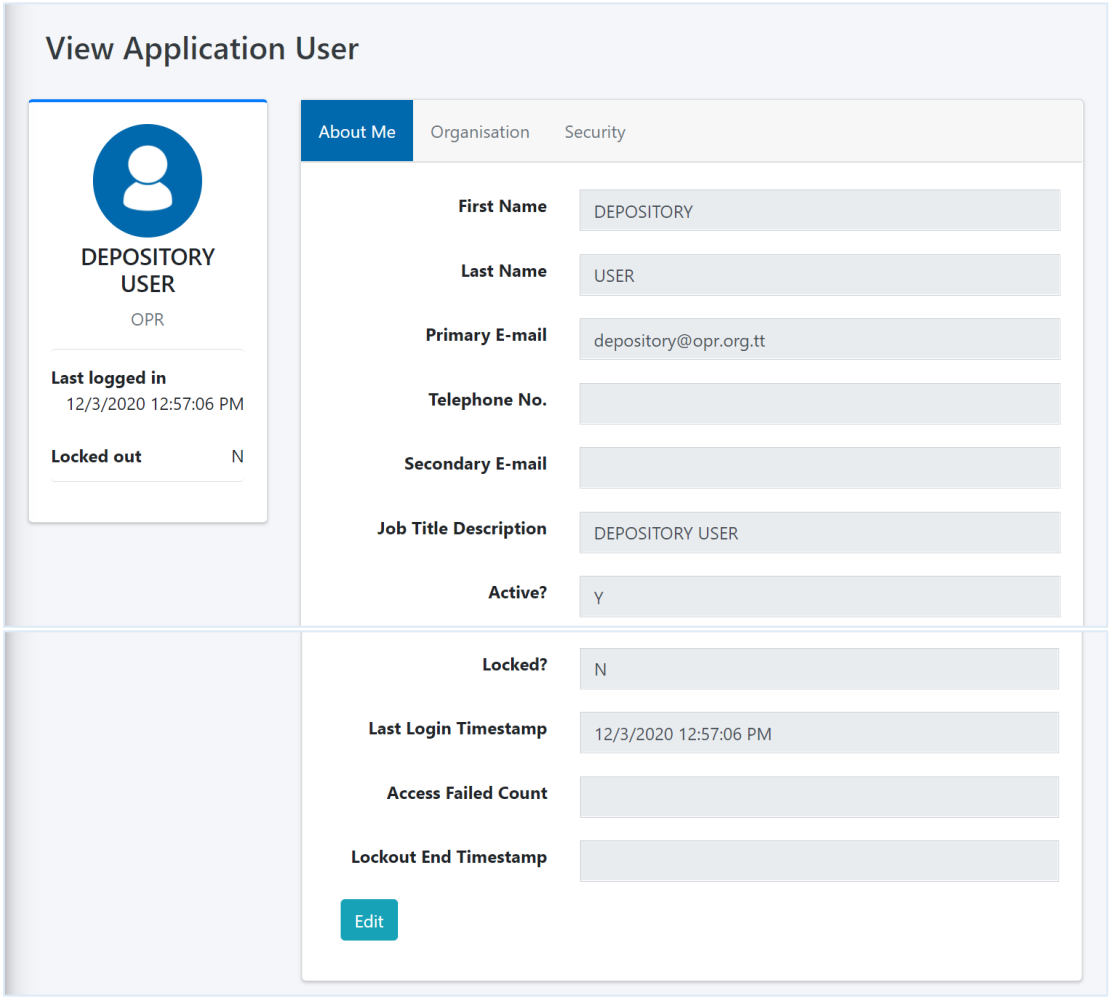


Figure 6.2 Application User – About Me

First Name
Enter the user's first name.

Last Name
Enter the user's last name.

Primary E-mail
View the user's primary e-mail address.

Telephone No.
Enter the user's telephone number.

Secondary E-mail

Enter the user's secondary e-mail address.

Job Title Description
Enter the user's job title description.

Active?
View whether the user account is active or inactive.

Locked?
View whether the user account is locked or not.

Last Login Timestamp
View the last date and time the user logged into the Depository.

Access Failed Count
View the number of failed attempts the user made in logging into their account.

Lockout End Timestamp
View the timestamp the user account lock will expire.

5.1.2 Organisation

This section allows you to view information of your role in your organisation.

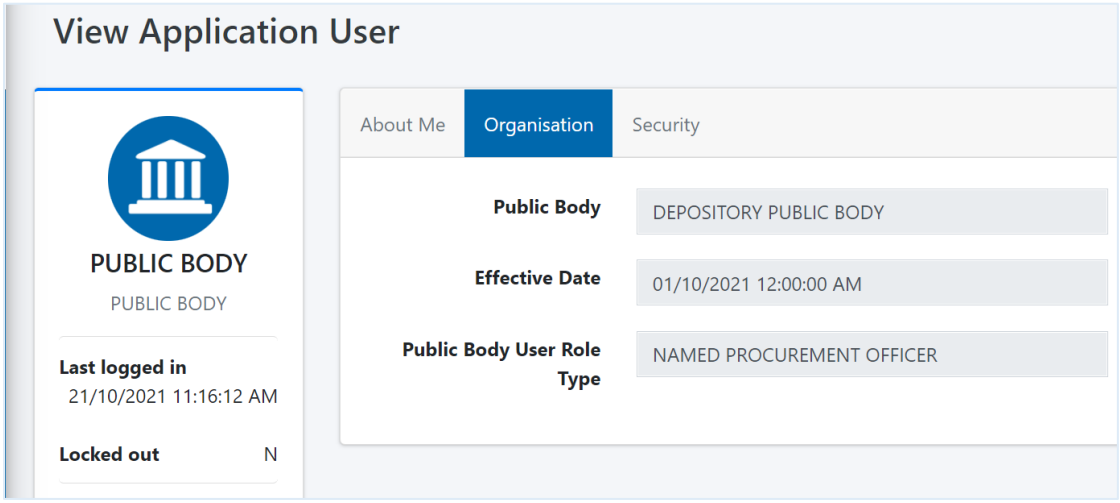


Figure 6.3 Application User – Organisation Screen

Public Body
The name of the public body.

Effective Date
The date the user account was created.

Public Body User Role Type
The user role assigned to the user account.

5.1.3 Edit Security Questions

This section allows the user to view and edit their security question and answers. This section is accessed by clicking on the Security tab of the Application user screen (see figure 29.0).

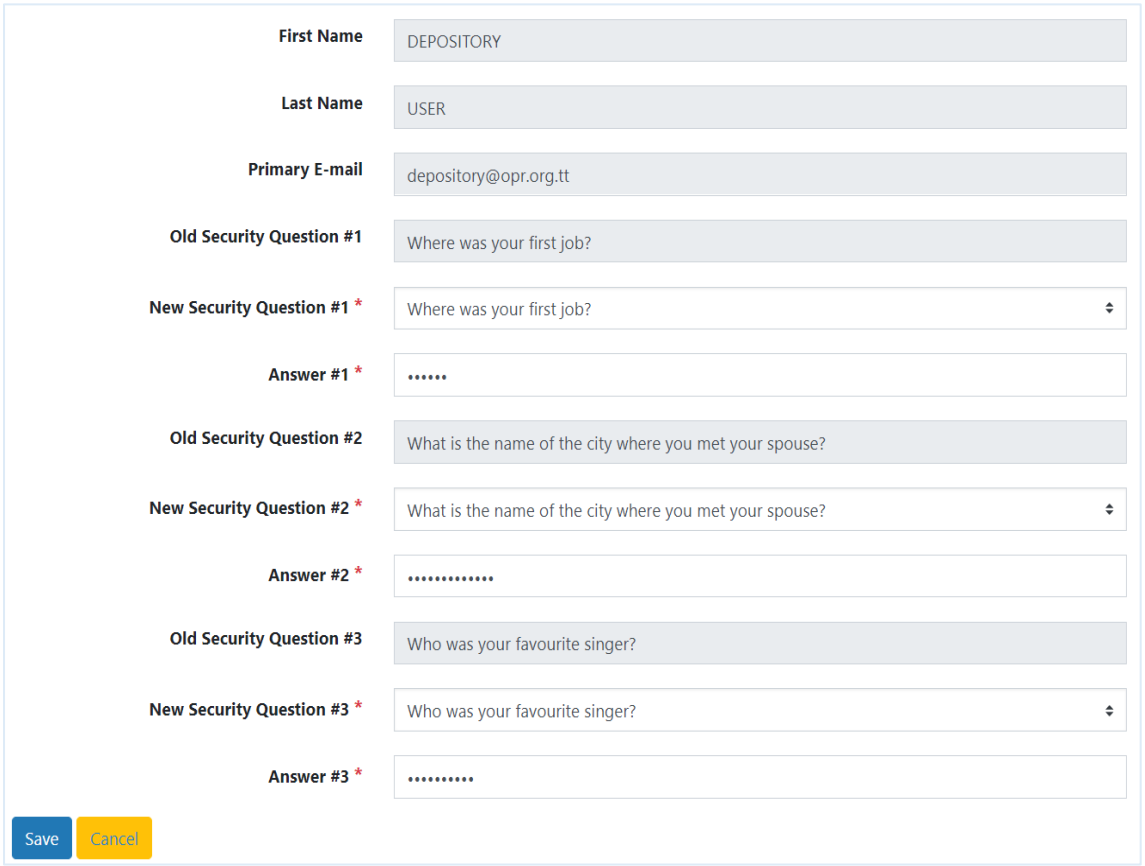


Figure 6.4 Application User - Security

First Name
View the account first name.

Last Name
View the account last name.

Primary E-mail
View the account's primary email address.

Old Security Question #1
View the account's current security question #1 selected.

New Security Question #1
Select the account's new security question #1.

Answer #1
Enter the answer to New Security Question #1.

Old Security Question #2
View the account's current security question #2 selected.

New Security Question #2
Select the account's new security question #2.

Answer #2
Enter the answer to New Security Question #2.

Old Security Question #3
View the account's current security question #3 selected.

New Security Question #3
Select the account's new security question #3.

Answer #3
Enter the answer to New Security Question #3.

5.2 Reset My Password

This section allows the user to reset their login password.

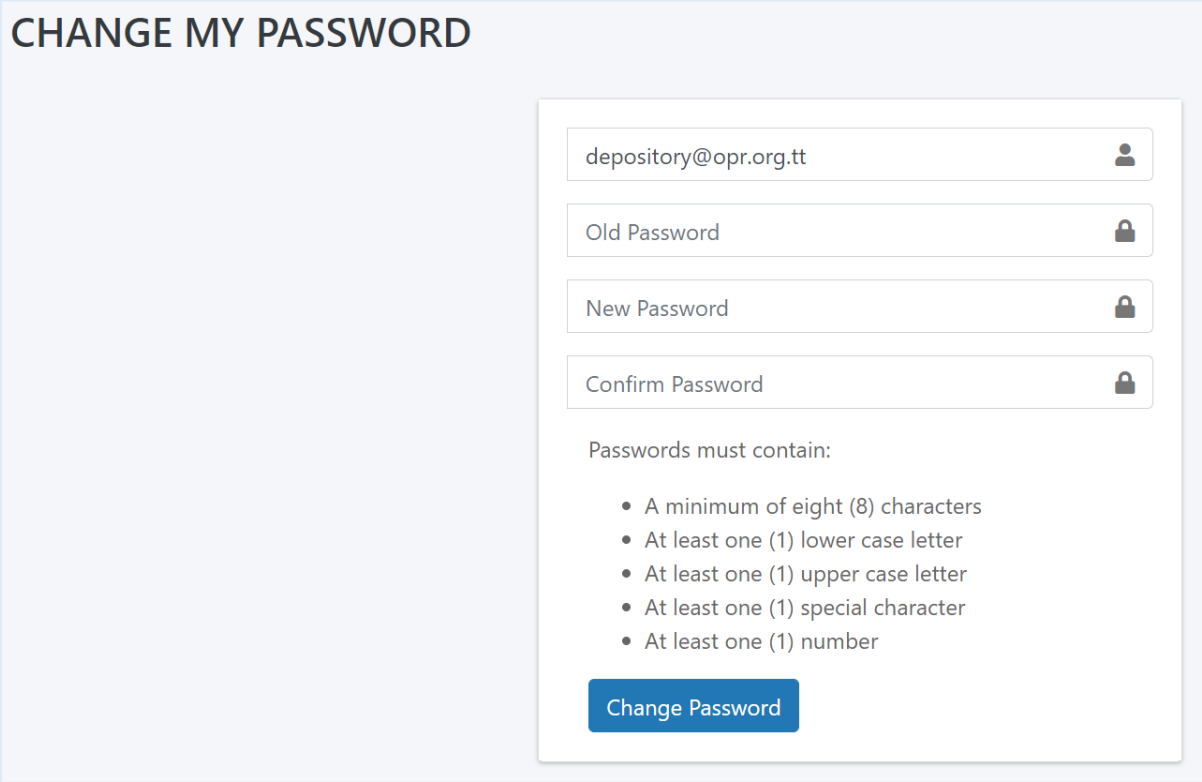


Figure 6.5 Change My Password Screen

Old Password
Enter current password to be changed.

New Password
Enter the new password selected.

Confirm Password
Re-enter the New Password selected to confirm.

Change Password
Click here to submit and complete the change to the New Password.

6.0 Glossary of Terms

Terms	Meaning
Act	The Public Procurement and Disposal of Public Property Act, 2015, as amended.
Authorised Agent	A person or organisation who has been legally empowered to act on behalf of another person or an entity.
CAPTCHA	Completely Automated Public Turing test to tell Computers and Humans Apart. A randomised string of letters used to prevent malicious bot spam.
Credentials	A combined set of username, password and security questions/answers used to login to the Depository.
Data	Any information entered into the Depository.
Ineligibility List	A list of suppliers or contractors who shall not participate in procurement proceedings.
License	Documented evidence that authorises an individual or group of individuals to provide a good, work and/or service.
Pre-Qualification	The procedure to identify, prior to solicitation, suppliers and contractors who are qualified.
Procurement Depository or "the Depository"	A database, to which suppliers or contractors can submit information with respect to, among other things, their qualifications and experience.
Profile	The representation of the Supplier within the Depository.
Public Body	(a) the Office of the President; (b) the Parliament; (c) the Judiciary; (d) a Ministry or a department or division of a Ministry; (e) the Tobago House of Assembly, or a division of the Tobago House of Assembly; (f) a Municipal Corporation established under the Municipal Corporations Act; (g) a Regional Health Authority established under the Regional Health Authorities Act; (h) a statutory body, responsibility for which is assigned to a Minister of Government; (i) a State-controlled enterprise; (j) a Service Commission established under the

	Constitution or other written law; or (k) a body corporate or unincorporated entity— (i) in relation to any function which it exercises on behalf of the State; or (ii) which is established by virtue of the President's prerogative, by a Minister of Government in his capacity as such or by another public authority; or (l) a body corporate or unincorporated entity in relation to any function, project, scheme or arrangement which involves the use by it, of public money.
Services	The work to be performed by the Consultant/Contractor pursuant to the Contract.
Supplier/Contractor	Any party or potential party to procurement proceedings with a procuring entity.
The Office of Procurement Regulation	A body corporate established pursuant to an Act of Parliament, namely the Public Procurement and Disposal of Public Property Act, 2015.
User	A person who has credentials to login to the Depository system.
Works	The construction and engineering works of all kinds.