

OCG WEB PORTAL INSTRUCTIONS

Office of the Contractor General

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REVISION LOG

Version Number	Date	Changes
Version 2	2014-12-11	<p>The field '<i>Date Head of Entity Pre Approval</i>' is now only applicable if the procurement processes started before March 17, 2014</p> <p>The field '<i>Date NCC Pre Approval</i>' is now only applicable if the procurement processes started before March 17, 2014</p> <p>Included instruction set for the new field '<i>Procurement Start Date</i>'</p>

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LOGGING IN TO THE SYSTEM

1. Navigate to <https://portal.ocg.gov.jm> in your preferred browser.
2. Click on the 'login' link at the top right hand corner of your screen.
3. Enter the username and password that was provided to you by the OCG.

Initial Login

1. Upon first login you will be prompted to change your password and to select security questions.
2. The old password is the password which was provided to you by the OCG. The security questions selected will be used in the event you forget your password. Click "Next".
3. You will then be prompted to edit your user profile.
4. Click "Update" after updating your profile page.

Note: In the future, if you wish to update/edit your profile, after logging on to the portal, click on the Profile link at the top right hand corner of your screen. The Public Body's profile page will be displayed. Select the particular section you wish to update. That is; Organization Profile, User Profile, Password or Security Questions

DECLARING THAT YOUR ORGANIZATION HAS AWARDED NO CONTRACTS

1. Click on the tab labeled "Contract Awards".
2. Click the "Create New Report" link.
3. Click the option "Declare that no Contracts were awarded" at the top of the page.
4. Click "Save".
5. A copy of the report will be displayed.

CREATING A NEW REPORT VIA THE WEB FORM

1. Click on the tab labelled "Contract Awards".
2. Click on the "Create new report" link.
3. Enter data on the contract being reported on in the applicable fields. (Please see below, the instructions on how to complete each field).
4. After all applicable data has been entered for the contract being reported, click "Save".
5. The data entered will be displayed below the input form.
6. To edit a contract reported, click anywhere within that row. The input form will be populated with the data to be edited. Make the necessary changes then click "Update".

ENTERING THE DATA INTO THE FIELDS

Procurement Start Date

State the date the procurement had commenced. Please note the following suggested dates:

Direct Contracting – The date that the Contractor was invited to participate

Limited Tender – the date of the letters of invitation

Local Competitive Bidding – the initial date that the notice was publicly advertised

International Competitive Bidding – the initial date that the notice was publicly advertised

Contract Award Date

State the date when the Contract was awarded. NB – Contracts with a date outside of the quarter will not be accepted.

Contract Description

Provide a brief description of the Contract, indicating the goods or services which were provided or the works which were performed under the Contract (e.g. Supply and Installation of Office Furniture; Provision of Security Services or Construction of bathroom facilities).

Name of Contractor

State the name of the person or entity to whom the Contract was awarded (e.g. Marsh Installation).

Contractor ID

Enter the Contractor ID, for example; 2345 or CP-358/04-05/4-2, or select an applicable answer from the drop-down list provided.

Type of Contract

Select the Type of Contract which was awarded from the drop-down list provided

Contract Value

State the total value of the contract. Please do not use commas, input values in the format '500000.50'. If the contract was issued in US or any other currency, please state the contract value in Jamaica Dollars and state the foreign currency value in the comments section of the report.

Principal Site of Contract

State the site at which the goods will be delivered or the services performed, or the district and parish in which the construction, or other works will be executed (e.g. Office of the Contractor General, 16 Oxford Rd., Kingston 5).

Procurement Method

Select the Procurement Method which was utilized from the drop-down list provided.

Number of Tenders/Quotes Requested

Please select from the drop-down list the total number of tenders and/or quotes which were requested. If the Procurement Method selected was "Local Competitive Bidding" or "International Competitive Bidding", please select the number "0".

Number of Tenders/Quotes Received

Please select from the drop-down list the total number of tenders and/or quotes which were received.

Date Head of Entity Pre Approval

Please Note this field is only applicable to contracts with procurement processes which started before March 17, 2014

Please indicate the date the Pre-approval of the Head of Entity was received if:

1. The Direct Contracting Procurement Methodology was used and contract value is over J\$500,000.00 and;
2. The Limited Tender method was used and the contract value is above J\$5M.

Date NCC Pre Approval

Please Note this field is only applicable to contracts with procurement processes which started before March 17, 2014

Please indicate the date the endorsement of the NCC was received if:

1. The Direct Contracting Procurement Methodology was used and the contract value is over J\$5M; and
2. The Limited Tender Procurement Methodology was used and the contract value is over J\$15M.

Tender Opening Date

State the date the Tender Opening was held and/or the deadline for receipt of quotation if a Request for Quotation was used for the procurement of Goods. If the deadline for submission is different from the date of the Tender Opening, please indicate so in the comments section of the report.

Procurement Committee Approval Date

If applicable, state the date the Public Body's Procurement Committee evaluated the procurement and endorsed the engagement of the contractor which has been selected.

Head of Entity Approval Date

State the date the Head of Entity approved the engagement of the contractor which has been selected.

NCC Endorsement Date

If applicable, state the date the NCC endorsed the engagement of the Contractor which has been selected.

Cabinet Approval Date

If applicable, state the date the Cabinet approved the engagement of the Contractor which has been selected.

Justification For the Use Of the Limited Tender Procurement Methodology

If applicable select a justification from the drop-down list provided.

Please note, this is only applicable if the "LT" procurement method was used and the contract value is over J\$5 Million for Goods, Works and Services.

Justification For the Use Of the Direct Contracting Procurement Methodology

If applicable select a justification from drop down list provided.

Please note, this is only applicable if the "DC" procurement method was used and the contract values is above J\$500,000.00 and/or if the "DC – Emergency" procurement method was used and the contract Value is above J\$500,000.00.

Additional Comments

If there is any additional information you wish to bring to the attention of the OCG about the particular contract, you may state so in this field.

MODIFYING EXISTING REPORTS

1. Click on the tab labelled "Contract Awards".
2. Under the applicable quarter, click the 'modify' link under the report you would like to modify.
3. Enter data on the contract being reported in the applicable fields.
4. After all applicable data has been entered for the contract being reported, click "Save".
5. The data entered will be displayed below the input form.
6. To edit a contract reported, click anywhere within that row. The input form will be populated with the data to be edited. Make the necessary changes then click "Update".
7. To delete a contract entered, click anywhere within that row. The input form will be populated with data. Click "Delete" below the input form.

CREATING A REPORT USING THE EXTENSIBLE MARKUP LANGUAGE (XML) IMPORT

This is applicable to Public Bodies which may have a software programme that stores its procurement data. Please consult with your IT Administrator for guidance.

Or

Persons who prefer creating the contracts in Microsoft Excel or any other software that can manipulate XML.

1. Click on tab labeled "Contract Awards".
2. Click the "Import report from XML".

Note: a sample file is provided for reference, when opening this sample file in Microsoft Excel select 'Open as XML Table' when prompted.

3. Create your XML file using Microsoft Excel or by any other means. Please ensure the XML file is formatted similarly to the sample file.
4. If using Microsoft Office, save file on your computer in the 'XML Data' format. Do not try to upload any other traditional Microsoft Excel File Formats.
5. On the XML Import page of the web portal click "Choose File".
6. Click "Upload".
7. A preview page will be displayed.
8. You may proceed to modify, print or submit the report.

SUBMITTING REPORTS TO THE OCG

1. On the "Contract Awards" page, click "Submit", or on the report page, click "Submit Report to the OCG".
2. Enter user password, then click "Confirm".
3. Upon clicking "Confirm", you will be notified that the report has been submitted to the OCG successfully.

Please note: A signed hard copy of the report must also be submitted to the OCG. This report must be printed from the QCA web portal. (See instructions on how to print a report)

PRINTING REPORTS

1. On the “Contract Awards” page, click “Print” or on the report page click “Print this Report”.
2. A print preview page will appear.
3. Please print reports using the landscape layout.
4. Click “Print”.

DELETING A REPORT

1. On the “Contract Awards” page, click “Delete” or on the report page click “Delete this Report”.
2. You will be asked to confirm that you want to delete this report. Click “Confirm”.
3. Upon clicking “Confirm”, you will be notified that the report has been deleted.

Caution / Disclaimer: A report, once DELETED, cannot be retrieved.

COPYING A REPORT

Note: The copy option allows a Public Body to modify a report which was submitted to the OCG and resubmit. A Public Body is allowed to resubmit a report only once.

1. On the “Contract Awards” page, click “Copy” or on the report page, click “Copy Report to New Version”.
2. You will be asked to confirm that you want to copy this version of the report. Click “Confirm”.
3. Upon clicking “Confirm”, you will be notified that the report was copied and a new version created for the particular quarter being reported on.
4. Under that newly created version of the report click “Modify”.
5. Proceed to make the necessary changes to the report and then resubmit to the OCG.

Disclaimer: You can only copy and resubmit a report ONCE.

Copying Tip

To copy a report from one Quarter to another, use the Export/Import XML Functionality.

1. Export the source report using the ‘export to xml’ link
2. Then create a new report from the exported file following the instructions in the Creating A Report VIA The XML Import option as described above.