

BIDDER TRAINING

UK SHARED BUSINESS SERVICES EMPTORIS TRAINING MODULE

1. SCOPE OF TRAINING

The scope of this training module will include

- Logging on the system
- Committing to respond to a requirement
- Reviewing RFx attachments
- Reviewing RFx messages
- Answering questionnaires
- Receiving clarifications
- Submitting your bid
- Downloading your response

2. LOGGING ONTO THE SYSTEM

It is assumed that the Bidder has a Login to Emptoris. If you do not have a login please use 'Bidder logging in – first time' for guidance on how to obtain a login and change your password.

Bidders who are invited into a sourcing exercise will receive an email similar to this:

The image shows a screenshot of an email invitation. The email text is as follows:

You have been invited to participate in the following event: UK SBS ITQ Halley Research Station garage rewire.

Please follow the instructions below to access the event

1. Logon to Government Procurement Service eSourcing
 - i. Enter your user name in the Name field.
 - ii. Enter your password in the Password field.
 - iii. Click the Login button.
2. From the main menu select Bids > View RFx(s).
3. Locate the RFx Name in the list of RFx(s).
4. Click on the RFx Name link to view the RFx.

Please do not hesitate to contact James Aldred Tel 01793 867593 for further information.

Please do NOT reply to this email as it is a system generated email with an un-monitored mailbox. Please log into <https://ukgps-sandbox.emptoris.com> to respond to this message.

Annotations on the screenshot:

- A red rounded rectangle highlights the login instructions in the numbered list.
- A yellow arrow points from the highlighted instructions to a yellow box containing the text: "Here are your login instructions and contact at UK SBS".
- A red rounded rectangle highlights the URL <https://ukgps-sandbox.emptoris.com>.
- A yellow arrow points from the highlighted URL to a yellow box containing the text: "Login URL".

Bidders will now need to login to the system.



Register Here

Name:

Password:

Forgot your Login Name or Password?

Useful Links

- [Register for CCS eSourcing](#)
- [Procurement Guidance](#)
- [Help & Support](#)

Related External Links

- [Crown Commercial Service Portal](#)
- [Contracts Finder](#)
- [Tenders Electronic Daily \(TED\)](#)
- [SIMAP](#)
- [Cabinet Office](#)

Bidders will now need to review the system usage terms for the e-sourcing suite.

Access to the system will only occur if you agree to the system usage terms:

Crown Commercial Service eSourcing Suite
Supplier System Usage Agreement
 Version 2.1

General Terms

1. Introduction

- This User Agreement between the Crown Commercial Service (the Buyer) and the Supplier governs the access and use of the eSourcing Suite (the System) by the Supplier to respond to an invitation from the Buyer to participate in a procurement exercise.
- A procurement exercise may include a Pre-Qualification Questionnaire (PQQ), a Request for Information (RFI), an Invitation to Tender (ITT), an Invitation to Negotiate (ITN), an Invitation to Participate in Dialogue (ITPD), an Invitation to Submit Final Offer (ITSFO), Invitation to Submit Final Tender (ITSFT), a Best And Final Offer (BAFO), a Request for Proposal (RFP), a Request for Quotation (RFQ), an electronic Auction or an electronic Contract. This above list of individual procurement exercise processes is indicative and a non-exhaustive representation of commonly used terminology. Buyer Organisations may have their own, unique terminology to be applied on a case by case basis.
- The System is provided by IBM and operated by the Buyer. This User Agreement applies to the Supplier's and its Supplier Users' access to and use of the System. The Supplier acknowledges that by a Supplier User accessing the System using the user ID and password provided by, or on behalf of the Buyer, the Supplier agrees to be bound by this User Agreement.
- The Supplier shall only use the System to respond to an invitation to participate in a procurement exercise in accordance with this User Agreement and any further rules expressed and presented in the System. In the event that there is any conflict between this User Agreement and any such further rules, then the provisions of such further rules shall take precedence over this User Agreement.

2. Access

- The Buyer grants to the Supplier, free of charge, access to the System by Supplier Users for the purpose of responding to any invitation to participate in a procurement exercise, subject to this User Agreement.
- The Buyer may immediately deny access to the System by the Supplier and/or one or more Supplier Users by giving notice in writing to the Supplier if any of the following events occur:
 - The Supplier commits a material breach of any of its obligations under this User Agreement, and
 - The Supplier fails to remedy, or persists in, any breach of any of its obligations under this User Agreement after having been notified in writing to remedy or desist such breach within a period of ten (10) Working Days.
- Without prejudice to any of the Buyer's other rights, the Buyer reserves the right to suspend access to the System without notice for technical or legal reasons.

3. Registration

- To be granted access to the System, the Supplier must register each person which the Supplier wishes to be a Supplier User by providing the required registration data and specifying a user ID and password.
- User ID and password are strictly personal to the Supplier User and non-transferable. The Supplier shall ensure that its Supplier Users do not divulge or disclose their user ID or password to third parties. In the event that the Supplier or a Supplier User becomes aware that a user ID and / or password may have been divulged, disclosed or discovered by any third party, they shall immediately notify the Buyer.
- The Supplier shall designate an individual Supplier User to manage access to the System by other Supplier Users.
- The Supplier must immediately inform the Buyer in the event that a Supplier User leaves its employment or no longer requires access to the System. The Buyer retains the right to deactivate a Supplier User user ID and password if there has been no access for a period of sixty (60) days.

4. Supplier's Obligations

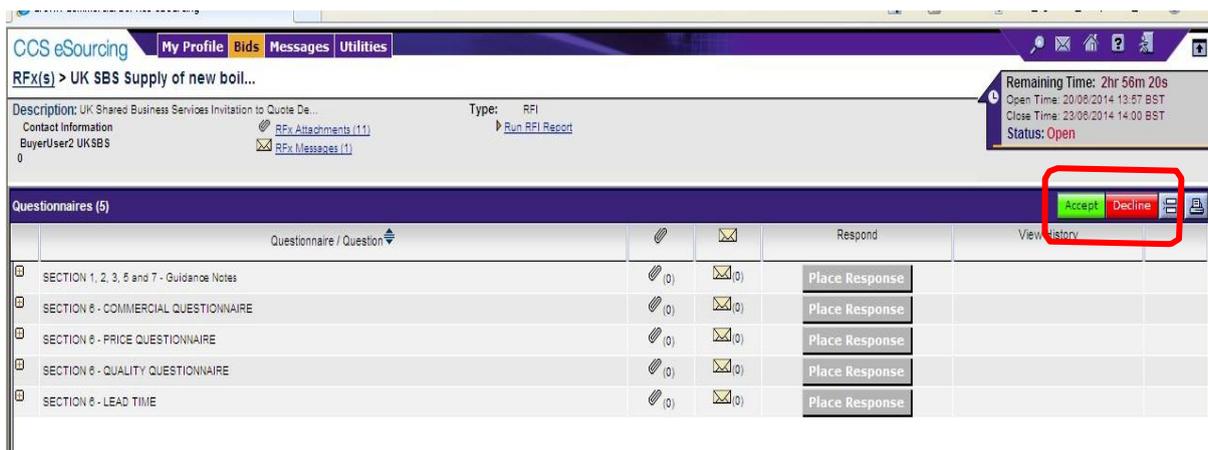
ESOURCING USE AGREEMENT

3. COMMITTING TO RESPOND TO A REQUIREMENT

Bidders will have access to all the sourcing activities they have been invited to and can click on 'view/respond to RFX' to confirm their interest.



Bidders can elect to 'Accept' or 'Decline' to Bid from here:



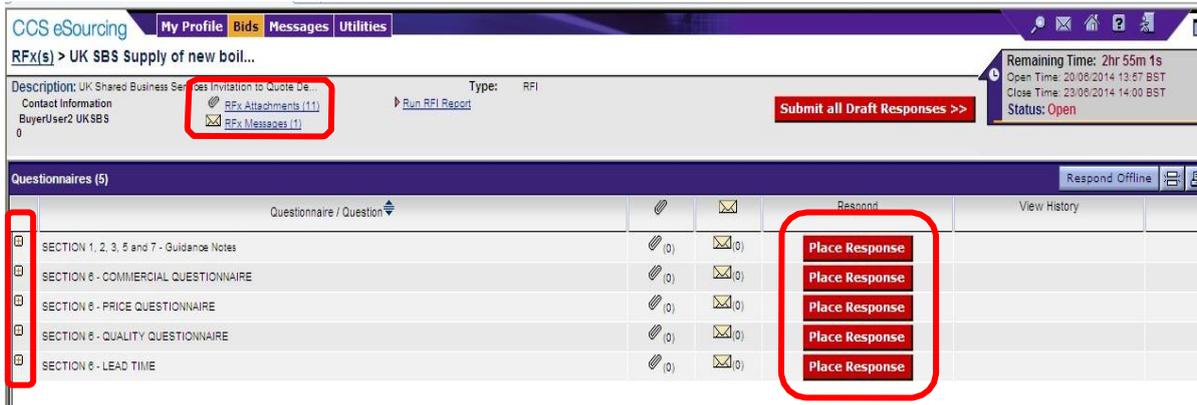
4. REVIEWING RFX ATTACHMENTS

Bidders will now face a page similar to this. Locations of key areas to consider are attached.

The + icons indicate the questionnaire can be expanded to reveal the questions below.

Place response is clicked on to place a response against a questionnaire.

RFX attachments and RFX message are available to view.

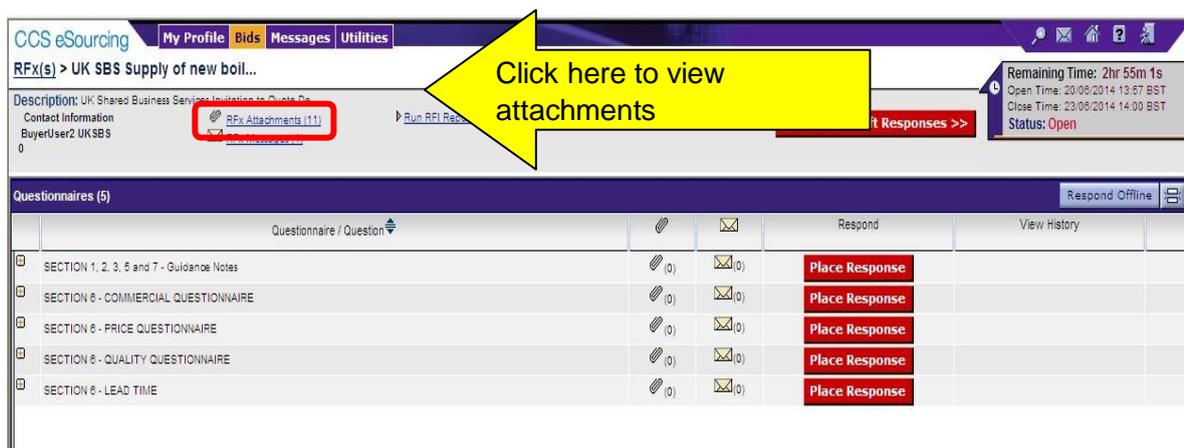


It is **STRONGLY** recommended that prior to commencing with completion of the questionnaire responses Bidders review all of the RFX attachment so they have a clear understanding of the requirement, evaluation model, price schedule, contract terms, and any associated attachments to questions.

Generally attachments to questions will have a naming convention at the start of the attachment name (e.g. AW5.2 Price Schedule) to help Bidders associate the attachment with the relevant clarification.

Bidders should also be aware that clarification answers to the bid documents will be posted to RFX attachments on a regular basis. Please regularly check for updates. Note typically the latest set of clarifications will be uploaded and the previous version deleted from the system.

To view attachments:



Bidders will see a screen like this:

Crown Commercial Service eSourcing - Windows Internet Explorer provided by ITC

https://ukgps-sandbox.emptoris.com/en/list_attachment_frame.jsp?OWNER_TYPE=4&OWNER_ID=41880&attachmentsType=_supplier_Attachments_

CCS eSourcing

Attachments (11)

Level	Folder	Content	Attachment Name	Description	Organi
Event	Instruction	Bidder Training.pdf	Bidder Training		Crown Comm
Event	Instruction	Clarifications of sourcing documents cas...	Clarifications to Bidders		Crown Comm
Event	Instruction	ITQ Invitation to Quote.doc	ITQ	ITQ sour	
Event	Instruction	http://www.uksbs.co.uk/services/procure...	UK SBS Training videos		
Question	RFI	AW1.1 Form of Bid ITQ.pdf	AW1.1 Form of Bid		
Question	RFI	AW1.3 Certificate of Bona Fide Bid.do	AW1.3 Certificate of Bona Fide Bid		
Question	RFI	AW3.1 ITQ Validation check.pdf	AW3.1 Validation check		
Question	RFI	AW5.2 Price schedule captivate video.xls	AW5.2 Price schedule	Price	
Question	RFI	AW5.5 I/Supplier fact sheet.pdf	AW5.5 I Supplier Fact Sheet		Crown Comm
Question	RFI	AW5.5 Science Warehouse fact sheet.pdf	AW5.5 Science Warehouse Fact Sheet		Crown Comm
Question	RFI	Area where new boiler will be install...	AW6.2 Plan	Image to support	bidder response. Crown Comm

Click on content link to download training videos and notes and attachments to RFx

Virus scanning is enabled for attachments. The export job will fail if it contains any infected files.

Click on the link in the Content column to view the attachment. To download attachments, check the box on the far right next to each file you'd like to d

They can access the specific attachment by clicking on one of the 'Content' hyperlinks.

Crown Commercial Service eSourcing - Windows Internet Explorer provided by ITC

https://ukgps-sandbox.emptoris.com/e1/virus_scan_results_popup.jsp?cur_id=406250&OWNER_TYPE=4&

CCS eSourcing

Attachments

Virus Scan Results

File	AW5.2 Price schedule captivate video.xls
Status	Passed

Download Cancel

5. REVIEWING RFx MESSAGES

Bidders can access RFx messages by clicking on the area below:

The screenshot shows the CCS eSourcing interface for a bid titled "UK SBS Supply of new boiler...". The top navigation bar includes "My Profile", "Bids", "Messages", and "Utilities". The "Messages" tab is active, showing a red box around the "RFx Messages (1)" link. Below this, a table lists questionnaires with columns for "Questionnaire / Question", "Respond", and "View History". The "Respond" column contains red "Place Response" buttons for each questionnaire item.

Questionnaire / Question	Respond	View History
SECTION 1, 2, 3, 5 and 7 - Guidance Notes	Place Response	
SECTION 6 - COMMERCIAL QUESTIONNAIRE	Place Response	
SECTION 6 - PRICE QUESTIONNAIRE	Place Response	
SECTION 6 - QUALITY QUESTIONNAIRE	Place Response	
SECTION 6 - LEAD TIME	Place Response	

All received messages are in the 'Received messages' folder.

All messages sent are in the 'Sent messages' folder.

All standard system related messages are in the 'Broadcast messages' folder.

It is **STRONGLY** recommended that Bidders review RFx messages before commencing with responding to the questionnaires.

Later in the training we will advise how to contact the UK SBS Category Manager for your procurement if you need to raise any clarifications or have any questions.

6. ANSWERING QUESTIONNAIRES

In order to answer a questionnaire Bidders need to click on the 'place response' button.

This screenshot is similar to the one above but highlights the "Place Response" button in the "Respond" column of the questionnaire table with a red box. The button text is "Place Response" and "Place Create Response".

Questionnaire / Question	Respond	View History
SECTION 1, 2, 3, 5 and 7 - Guidance Notes	Place Response Place Create Response	
SECTION 6 - COMMERCIAL QUESTIONNAIRE	Place Response	
SECTION 6 - PRICE QUESTIONNAIRE	Place Response	
SECTION 6 - QUALITY QUESTIONNAIRE	Place Response	
SECTION 6 - LEAD TIME	Place Response	

They will then face a screen with questions:

CCS eSourcing

Create Response

Context
RFI Name: UK SBS Supply of new boiler FM120051
Questionnaire Name: SECTION 6 - LEAD
TIME
Questionnaire Description:

Create Response(s)

*AW7.1 Please confirm you can meet a delivery date of 13/12/13.

Bidder Guidance - The Bidder shall answer yes or no.

Yes - Pass
No - Fail

Scoring Criteria - Mandatory Pass/Fail

Please Select Question Level (0)

*AW7.2 Please provide details of the make and model of the proposed boiler.

Bidder Guidance - Please complete the table and add an attachment as an URL link detailing the specification.

Scoring Criteria - For Information Only Question Level (0)

	Response
Make of boiler	
Model of boiler	

*AW7.3 Please confirm you can improve on the delivery date of 13/12/13

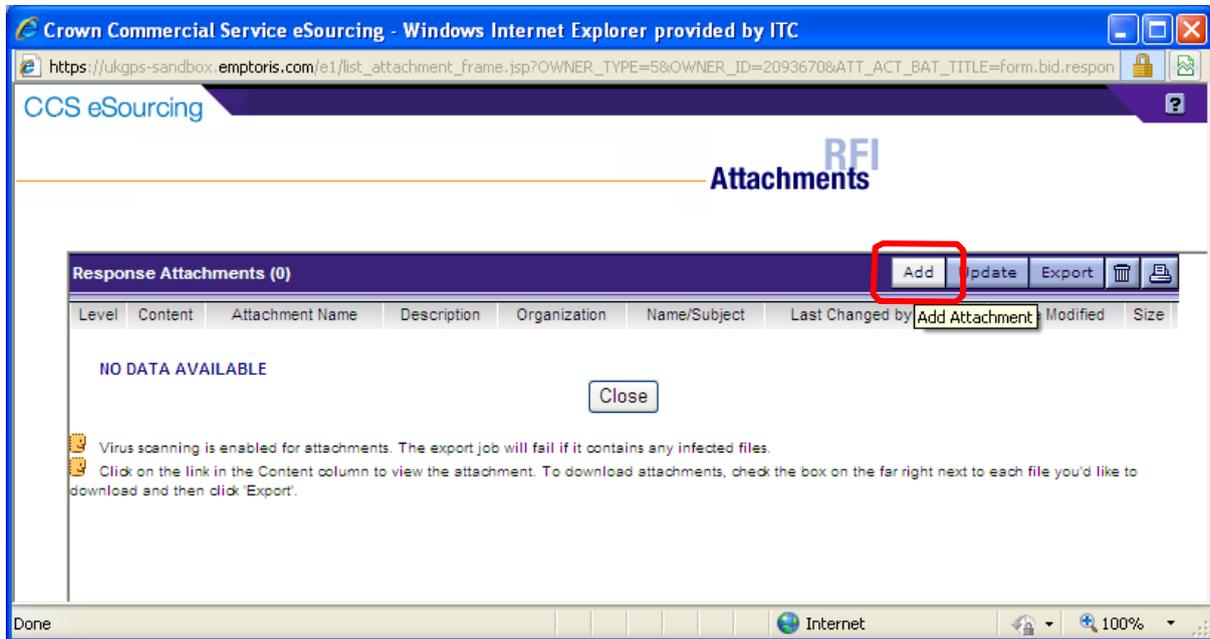
Typically the questions will detail:

- The question number – these are NOT sequential so do not think there are questions missing.
- The question detail
- Bidder guidance – This usually advises if attachments are permissible, word count details, guidance to help with the bid response and any specific information about the evaluation model proposed. Where a question is pass or fail typically Bidders will see the criteria for a pass or a fail.
- Scoring criteria – This indicates if the question is pass / fail, scoring (and the maximum score available) or for information only.

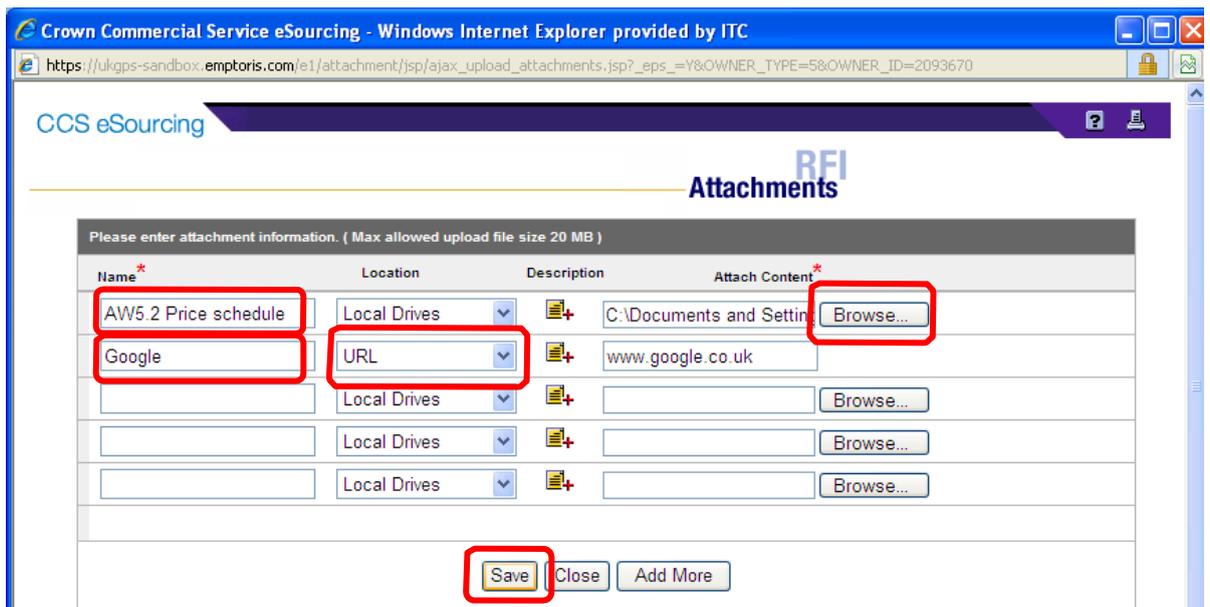
ALL REQUIRED (*) QUESTIONS WILL NEED TO HAVE SOME TEXT ENTERED IN ORDER TO SAVE YOUR ANSWERS.

Click on the various drop down boxes and complete the various text boxes to reply.

Where an attachment is permissible click on the question level  icon and you will see a pop up screen like this. Click on 'add' to add an attachment and then go to the bottom of the page and 'save'. After saving the question level  icon will show the number of attachments uploaded against the specific question.



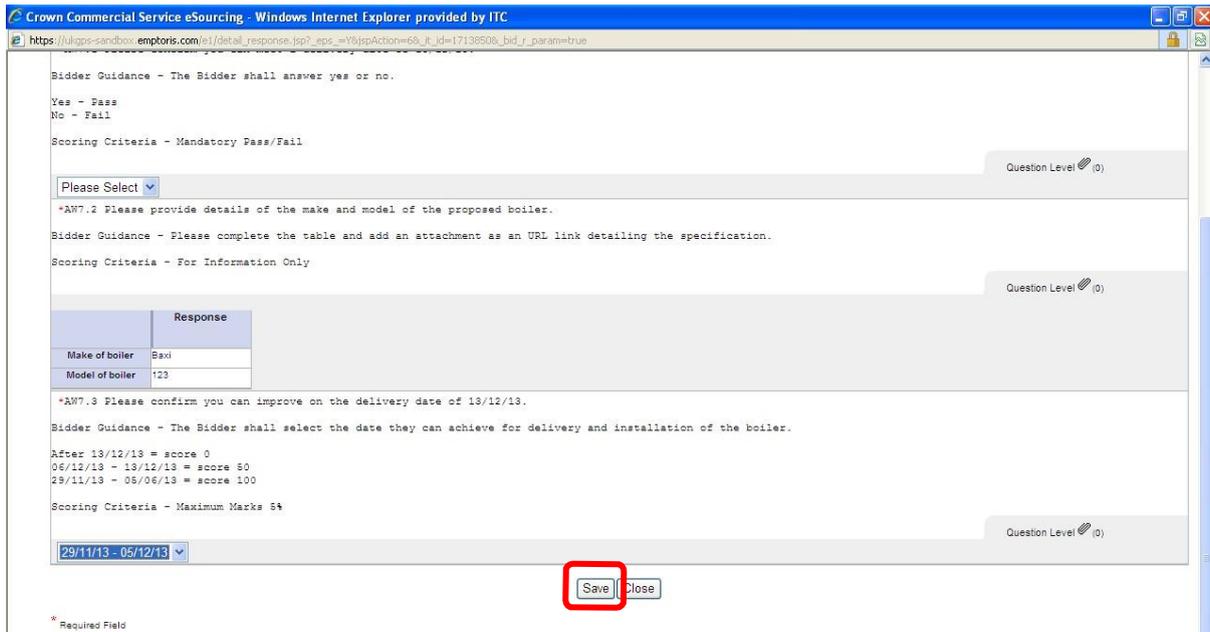
Bidders can add an attachment by clicking on browse and finding their file on their local PC or shared drive. They can change the name presented to UK SBS. It is **STRONGLY** recommended the Name commences with the question reference (e.g. AW5.2) to ensure we can effectively cross refer answers.



When you have completed a questionnaire and added all the relevant attachments you **MUST** click on the 'save' button.

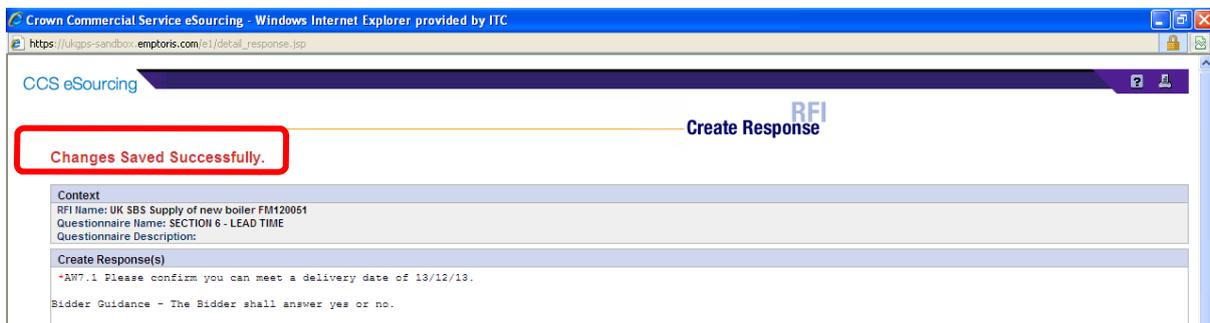
After saving the question level  icon will show the number of attachments uploaded against each specific question. Bidders must check their attachments have been correctly uploaded and embedded in the questionnaire response.

You will then see a message which says 'changes saved successfully' at the top of the page.



The screenshot shows a web browser window titled "Crown Commercial Service eSourcing - Windows Internet Explorer provided by ITC". The URL is "https://ukgps-sandbox.emptoris.com/e1/detail_response.jsp?_eps=Y&jsAction=6&_it_id=1713650&bid_r_param=true". The page content includes:

- Bidder Guidance - The Bidder shall answer yes or no.
- Yes - Pass
- No - Fail
- Scoring Criteria - Mandatory Pass/Fail
- A dropdown menu with "Please Select" and a "Question Level" icon (0).
- *AW7.2 Please provide details of the make and model of the proposed boiler.
- Bidder Guidance - Please complete the table and add an attachment as an URL link detailing the specification.
- Scoring Criteria - For Information Only
- A table with columns "Response" and "Make of boiler" (Baxi) and "Model of boiler" (123).
- *AW7.3 Please confirm you can improve on the delivery date of 13/12/13.
- Bidder Guidance - The Bidder shall select the date they can achieve for delivery and installation of the boiler.
- After 13/12/13 = score 0
- 06/12/13 - 13/12/13 = score 50
- 29/11/13 - 05/06/13 = score 100
- Scoring Criteria - Maximum Marks 54
- A dropdown menu with "29/11/13 - 05/12/13" and a "Question Level" icon (0).
- A "Save" button and a "Close" button, with the "Save" button highlighted in a red box.
- * Required Field



The screenshot shows the same web browser window. At the top, there is a "Create Response RFI" button. Below it, a red-bordered box contains the message "Changes Saved Successfully.". Below the message box, there is a "Context" section with the following text:

- RFI Name: UK SBS Supply of new boiler FM120051
- Questionnaire Name: SECTION 6 - LEAD TIME
- Questionnaire Description:

Below the context section, there is a "Create Response(s)" section with the following text:

- *AW7.1 Please confirm you can meet a delivery date of 13/12/13.
- Bidder Guidance - The Bidder shall answer yes or no.

If Bidders do not fill in the entire form you will receive a message which says:

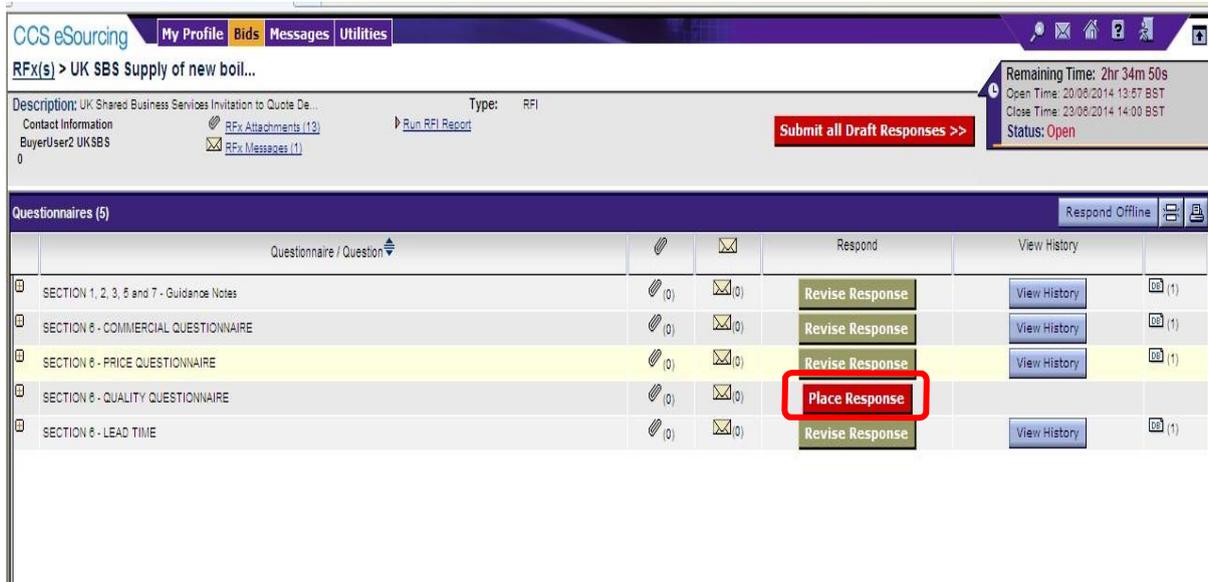


The screenshot shows a "Message from webpage" dialog box with a blue title bar and a red 'X' button in the top right corner. On the left, there is a yellow warning triangle icon. The main text reads: "There are one or more required fields on this form. Please fill in any field that has a red (*) next to it." At the bottom center, there is an "OK" button.

Bidders should find the missing field and provide an answer otherwise all the answers will not be saved.

When complete save and close the questionnaire.

On the questionnaires page you will see the 'Respond' field has now gone green, but answers can still be modified until you submit the draft responses.

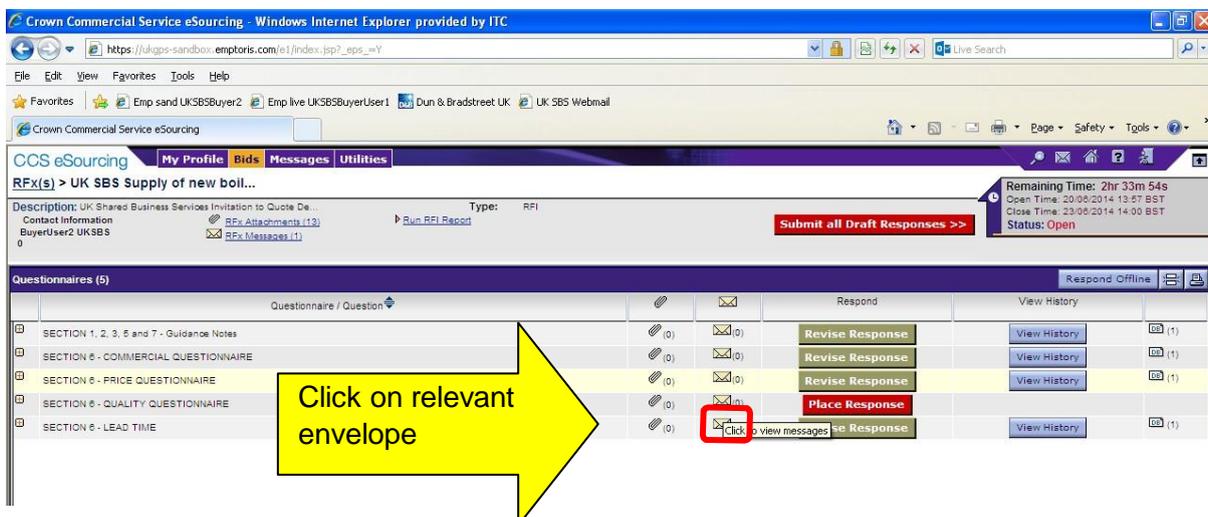


Once all questionnaires are completed you can submit them.

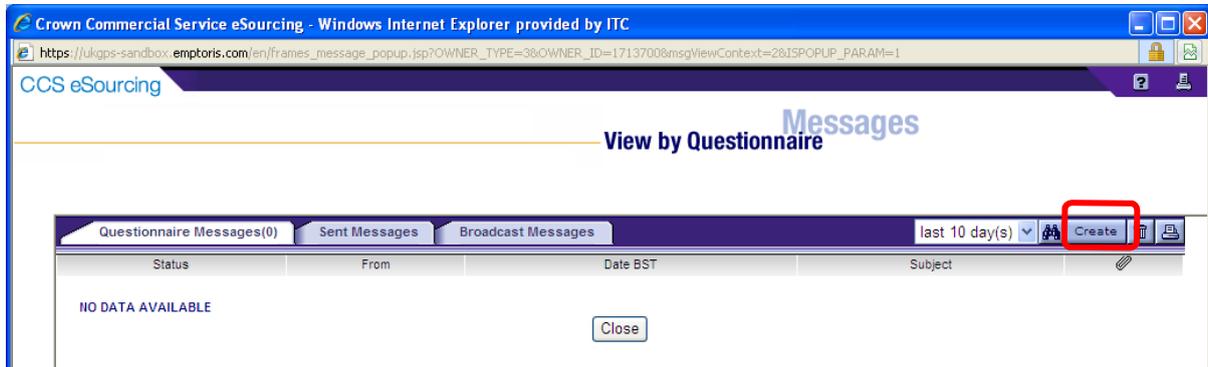
7. RAISING CLARIFICATIONS

Clarifications can be raised easily in two ways, irrespective of the approach taken it is **crucial** that Bidders cross reference their clarification to the relevant question number.

Clarification at questionnaire level.



You will always see a screen like this with messages in (questionnaire messages), your messages (sent messages) and system messages (broadcast message).

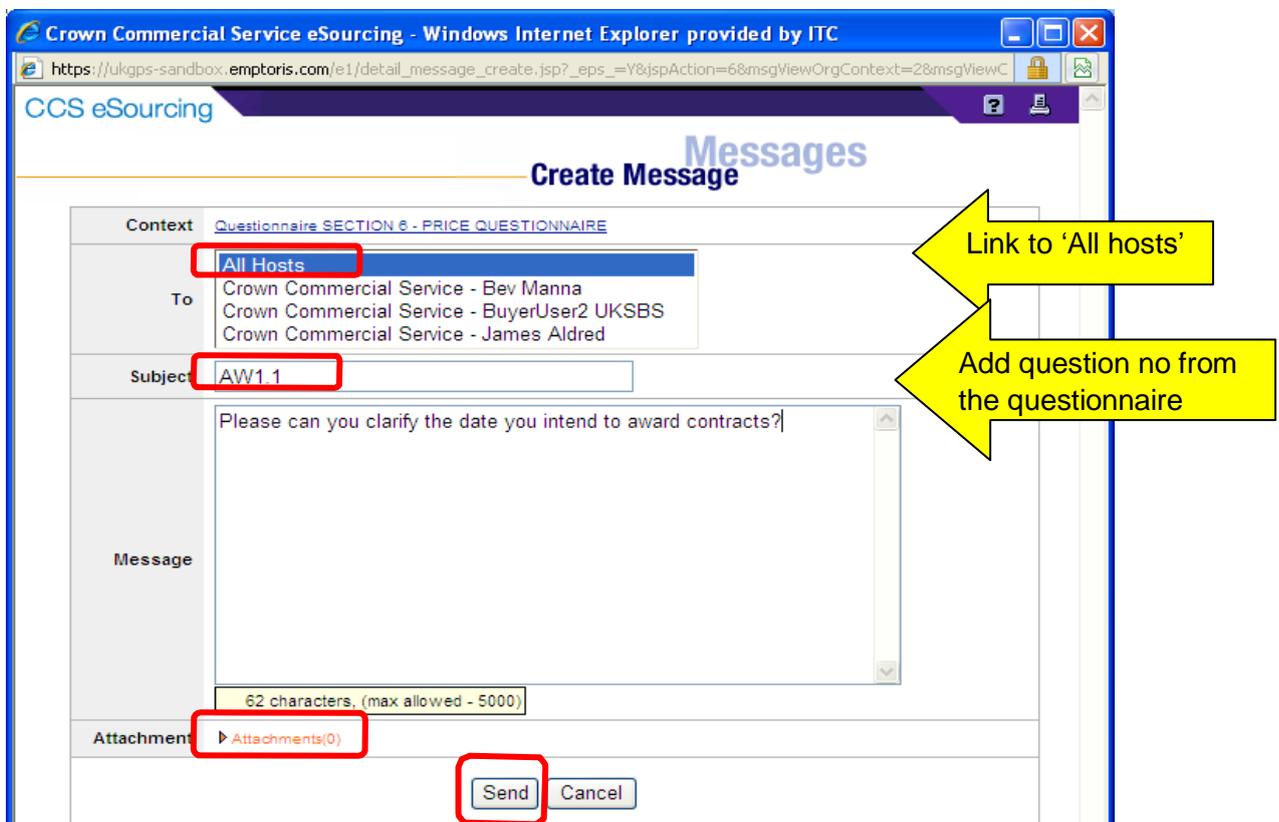


To raise a clarification click on 'Create'

You will now be able to upload your message and any attachments.

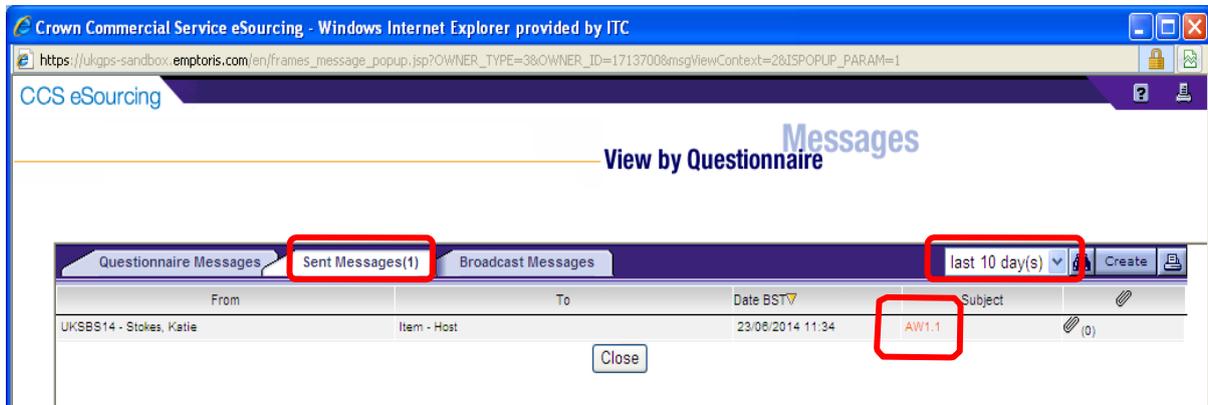
Always send to 'All hosts'.

Remember to cross reference to the question number and to 'send' the document.

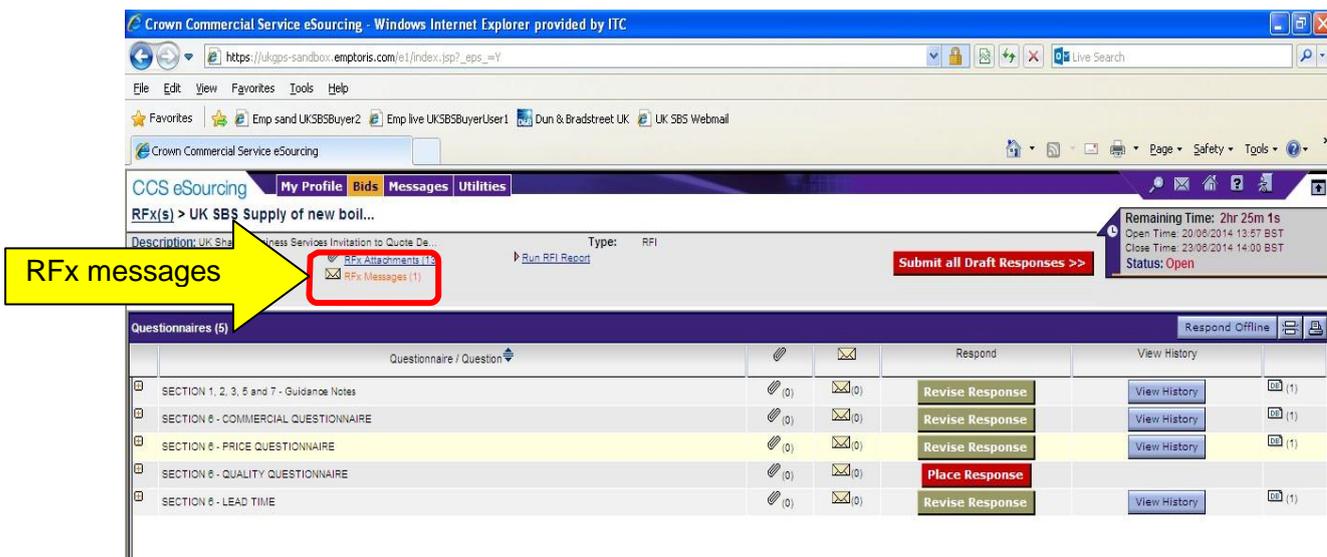


Bidders can view the question in the sent messages.

They can also filter against all questions, last 30 days, 10 days or last day



Alternatively Bidders can raise clarifications through RFX messages:



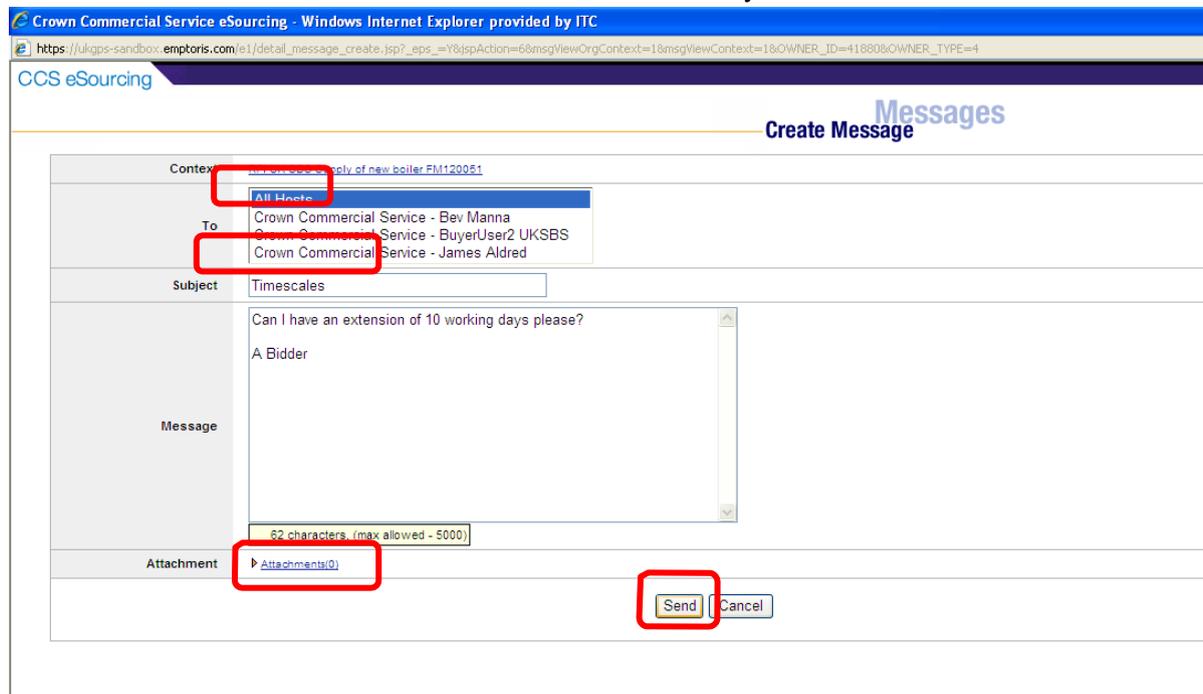
In RFX messages the process is similar to the questionnaire clarifications. Click on 'create' to send a new message.



Bidders can upload their clarifications, remembering to send to 'All hosts' and including the question number (if relevant) in the subject.

In this example it is a general clarification and not associated to a specific question.

Remember Bidders can add attachments and must always 'send' the clarification.



The clarification can now be viewed in the sent messages folder.

Note the previous clarification raised at questionnaire level is also available to view.

The filtering of messages against 1, 10, 30 days or all is still available in this view.



8. RECEIVING CLARIFICATIONS

Regularly check the RFX attachments folder for clarifications to the procurement.

There may be associated messages also in RFX messages to review.

Note it is the Bidders responsibility to check for clarifications.

The screenshot shows the CCS eSourcing interface for an RFX titled "UK SBS Supply of new boiler...". The "RFx Attachments (13)" link is highlighted with a red box. Below, a table lists questionnaires with actions like "Revise Response" and "Place Response".

Questionnaire / Question	Respond	View History
SECTION 1, 2, 3, 5 and 7 - Guidance Notes	Revise Response	View History
SECTION 6 - COMMERCIAL QUESTIONNAIRE	Revise Response	View History
SECTION 6 - PRICE QUESTIONNAIRE	Revise Response	View History
SECTION 6 - QUALITY QUESTIONNAIRE	Place Response	View History
SECTION 6 - LEAD TIME	Revise Response	View History

Clarifications will generally be given a document name 'Clarifications'. Generally only the latest set of clarifications will be uploaded.

Simply click on the content for the relevant file to download it.

The screenshot shows the "Attachments (13)" page in the CCS eSourcing system. A table lists various attachments, with "Clarifications of sourcing doc...xls" highlighted by a red box.

Level	Folder	Content	Attachment Name	Description	Organiz
Event	Instructions	Bidder Training.pdf	Bidder Training		Crown Commer
Event	Instructions	Clarifications of sourcing doc...xls	Clarifications to sourcing documents 23...		Crown Commer
Event	Instructions	ITQ Invitation to Quote.doc	ITQ	ITQ sourcing document	Crown Commer
Event	Instructions	http://www.uksbs.co.uk/services/procure/...	UK SBS Training videos		Crown Commer
Question	RFI	AW1.1 Form of Bid ITQ.pdf	AW1.1 Form of Bid		Crown Commer
Question	RFI	AW1.3 Certificate of Bona Fide Bid.doc	AW1.3 Certificate of Bona Fide Bid		Crown Commer
Question	RFI	AW3.1 ITQ Validation check.pdf	AW3.1 Validation check		Crown Commer
Question	RFI	AW5.2 Price schedule captivate video.xls	AW5.2 Price schedule	Price schedule of requirement.	Crown Commer
Question	RFI	AW5.5 I Supplier fact sheet.pdf	AW5.5 I Supplier Fact Sheet		Crown Commer
Question	RFI	AW5.5 Science Warehouse fact sheet.pdf	AW5.5 Science Warehouse Fact Sheet		Crown Commer
Question	RFI	Area where new boiler will be installed...	AW6.2 Plan	Image to support bidder response.	Crown Commer
Response	RFI	AW5.2 Price schedule.xls	AW5.2 Price schedule		UKSBS14
Response	RFI	http://www.google.co.uk	Google		UKSBS14



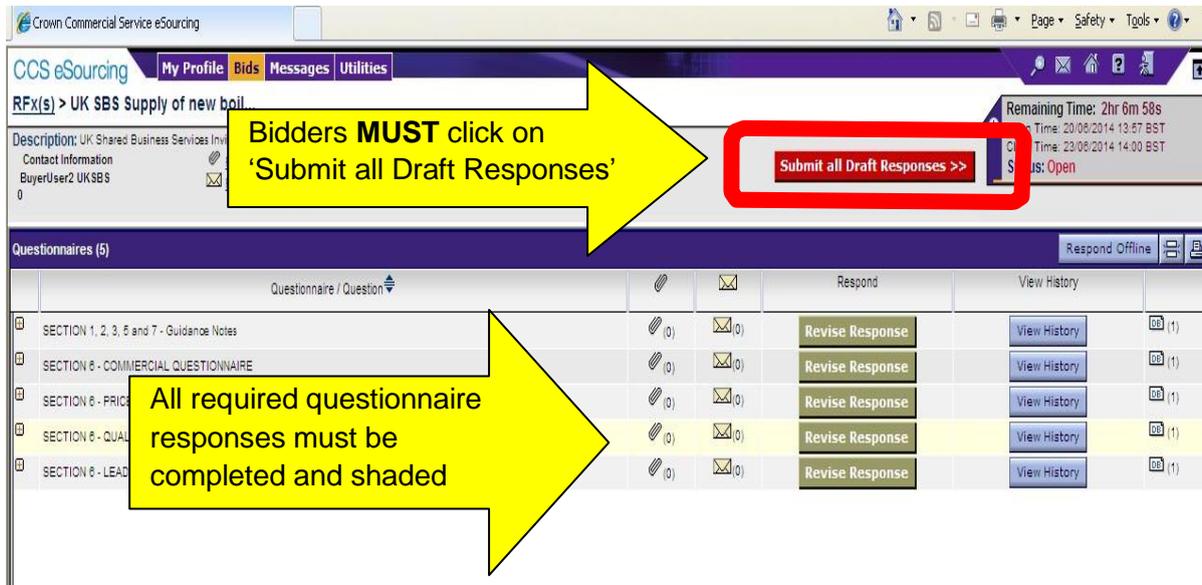
Bidders should see a document like this now, detailing all the clarifications received. This document is available to all Bidders at all times, irrespective of when they requested access to the procurement:

	A	B	C	D	E	F	G	H
1	Sourcing Document Clarifications							
2								
3								
4								
5	SOURCING REFERENCE:				Purchase of new boiler			
6	SOURCING DOCUMENT TITLE:				FM120051			
7								
8	No.	Section of sourcing document	Questionnaire	Question No.	Issue raised by Bidder for clarification	Date raised	Issue responded to by UK SBS	Date responded
9	1	General			Can I have an extension of 10 working days	17/06/14	No extensions will be accepted on this project	17/06/14
10	2	6	Quality	AW6.2	Can a Bidder upload two attachments in response to this question a plan and a drawing?	17/06/14	Only one attachment will be accepted, if you submit more than one attachment only the first attachment will be considered. You can combine the image and the plan into a single attachment if you wish.	17/06/14
11	3	6	Lead time	AW7.1	If a Bidder cannot meet the pass / fail date for the lead time, but puts forward a aggressive price will they be considered?	17/06/14	No - it is a pass / fail question and the bid will not be considered whatever the price	17/06/14
12	4	6	Commercial	AW1.1	Please confirm when you intend to award contracts	23/06/14	We intend to award by 1/7/14	23/06/14
13	5							
14	6							

9. SUBMITTING YOUR BID

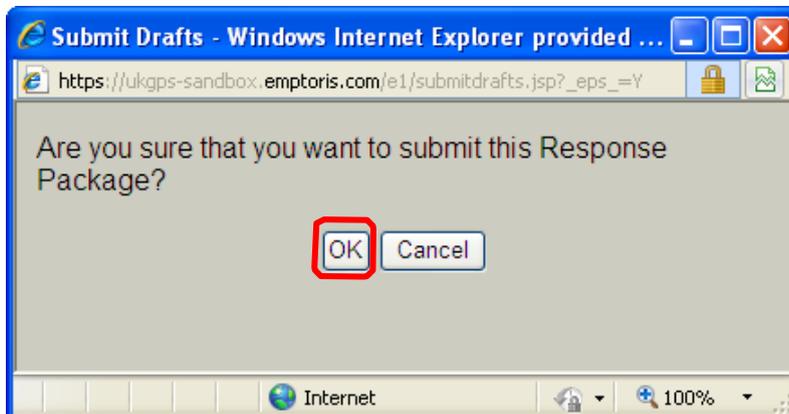
Once you have answered all required (*) questions and uploaded all your attachments you can submit your draft response.

If you fail to submit all draft responses before the closing date your bid cannot be received and considered.



The screenshot shows the CCS eSourcing web application. At the top, there are navigation tabs for 'My Profile', 'Bids', 'Messages', and 'Utilities'. The main content area displays a bid titled 'UK SBS Supply of new boiler' with a remaining time of 2hr 6m 58s. A yellow arrow points to a red-bordered button labeled 'Submit all Draft Responses >>'. Below this, a table lists five questionnaires, each with a 'Revise Response' button. A second yellow arrow points to these buttons with the text 'All required questionnaire responses must be completed and shaded'. The table columns are 'Questionnaire / Question', 'Respond', and 'View History'.

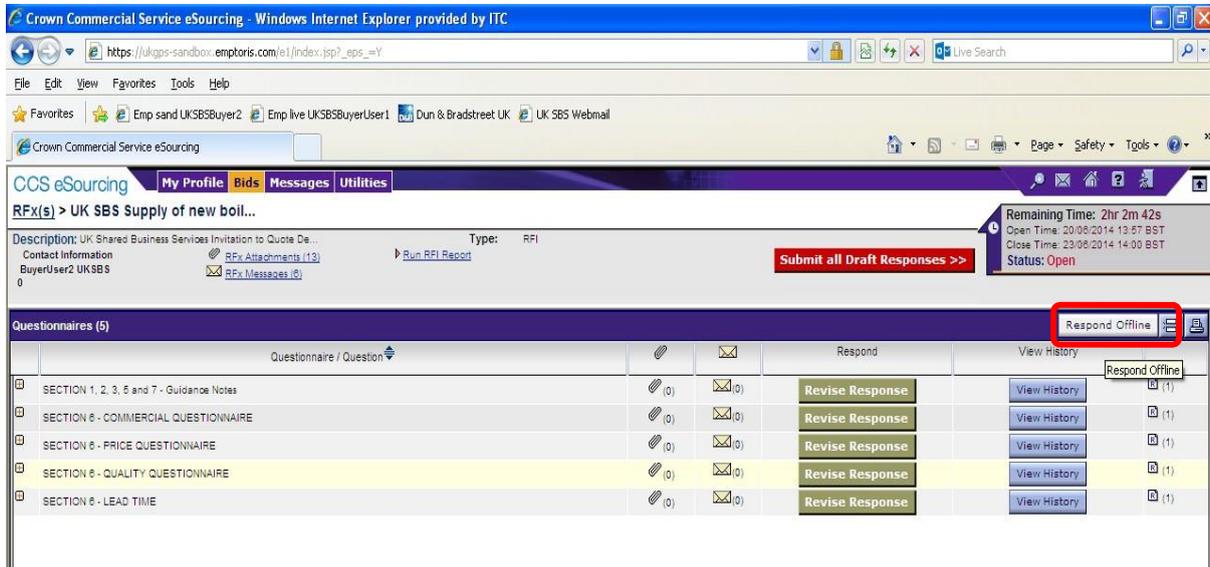
Questionnaire / Question	Respond	View History
SECTION 1, 2, 3, 6 and 7 - Guidance Notes	Revise Response	View History
SECTION 6 - COMMERCIAL QUESTIONNAIRE	Revise Response	View History
SECTION 6 - PRICES	Revise Response	View History
SECTION 6 - QUALITY	Revise Response	View History
SECTION 6 - LEAD TIMES	Revise Response	View History



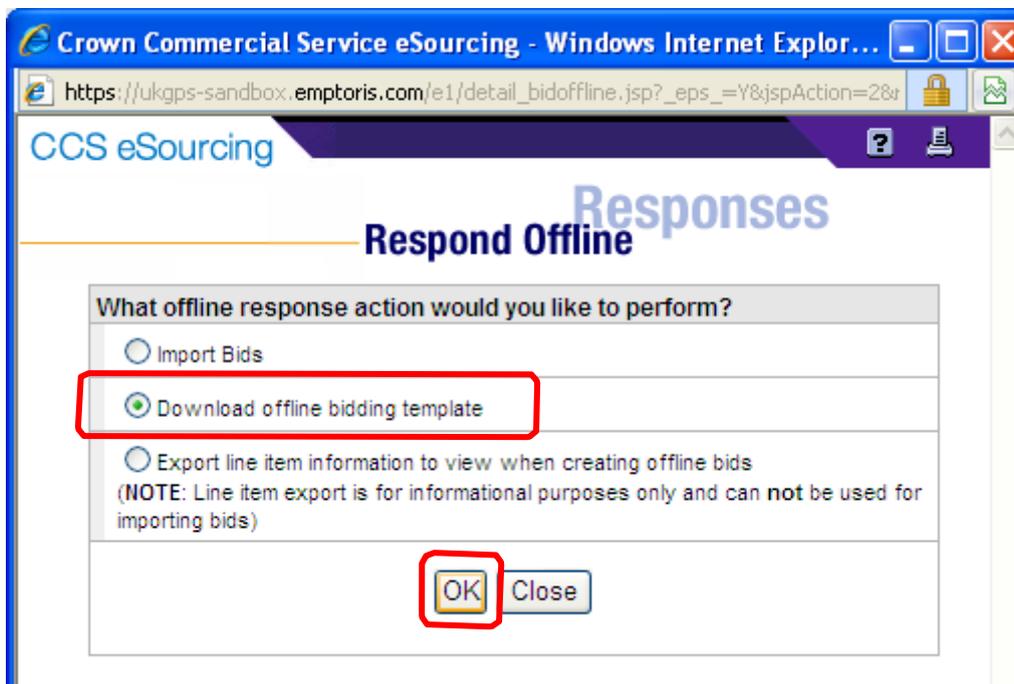
Questionnaire responses can be updated at any time up to the closing date; however each time you update the questionnaire responses **YOU MUST RESUBMIT YOUR RESPONSE.**

10. DOWNLOADING YOUR RESPONSE

You can download your text responses to the questionnaire by simply clicking on 'Respond offline':

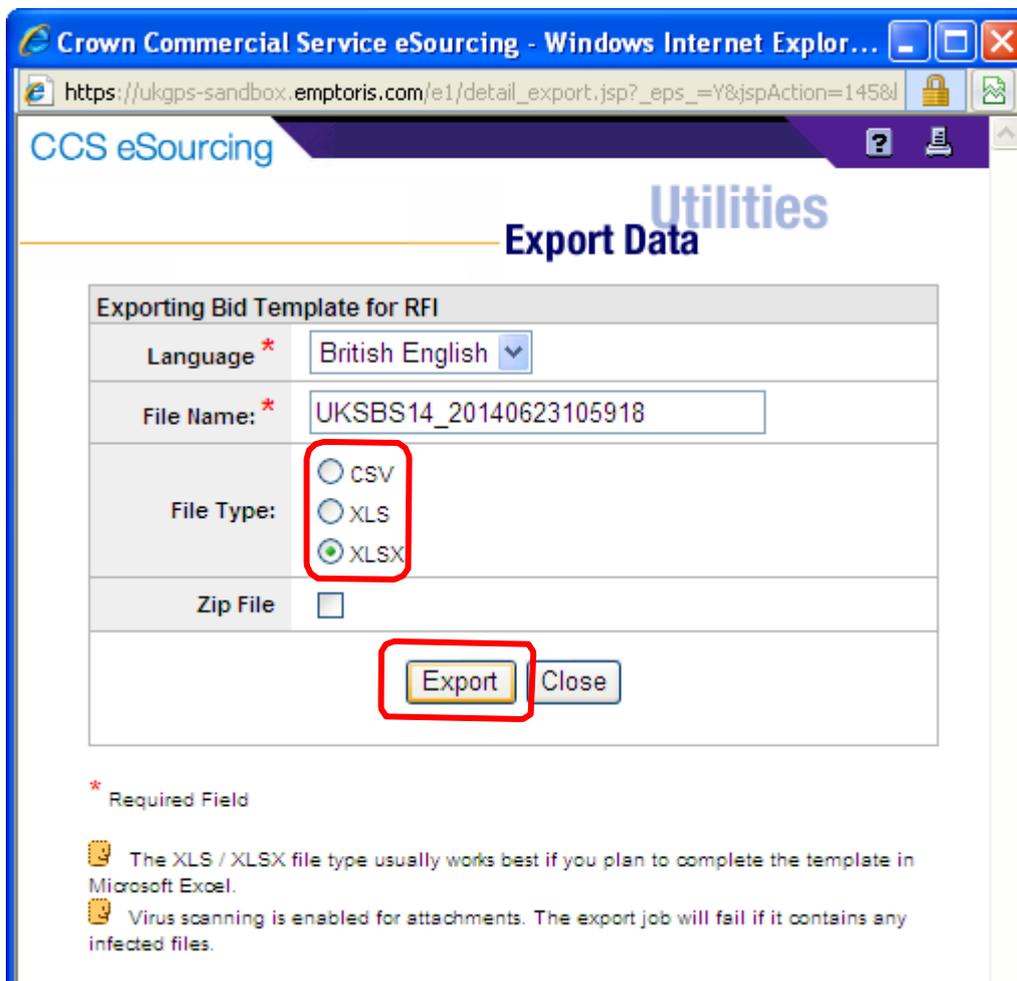


Then click on 'download offline bidding template' and OK



Note it is not permitted for Bidders to use this functionality to import bids.

And export in your required format:



Exporting Bid Template for RFI

Language * British English

File Name: * UKSBS14_20140623105918

File Type: CSV XLS XLSX

Zip File

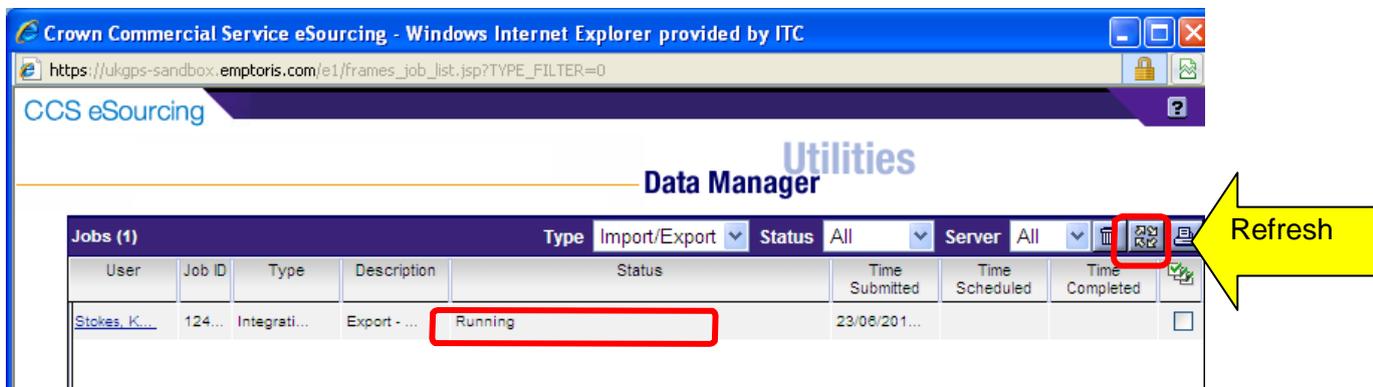
Export Close

* Required Field

The XLS / XLSX file type usually works best if you plan to complete the template in Microsoft Excel.

Virus scanning is enabled for attachments. The export job will fail if it contains any infected files.

From here you will see the Data Manager, refresh the page after a few seconds and you should be able to click through to your report. Repeat this process if the Data Manager is showing 'pending' or 'running' status.

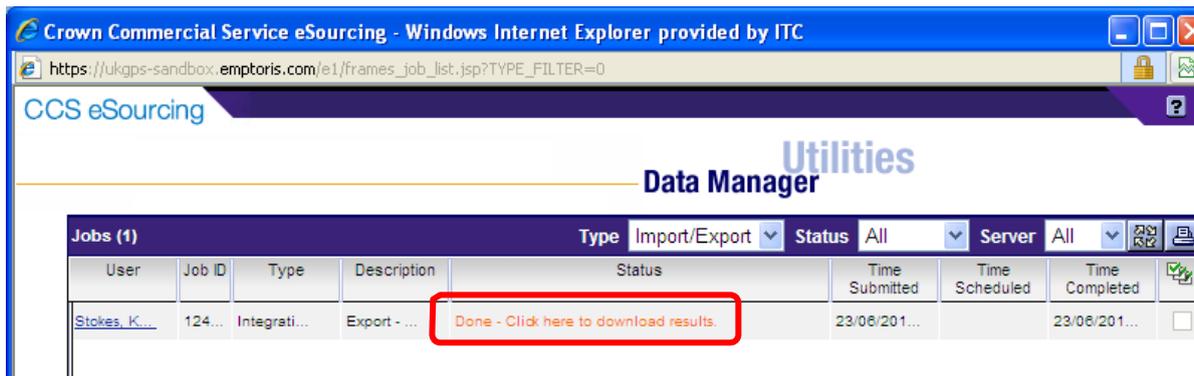


Data Manager

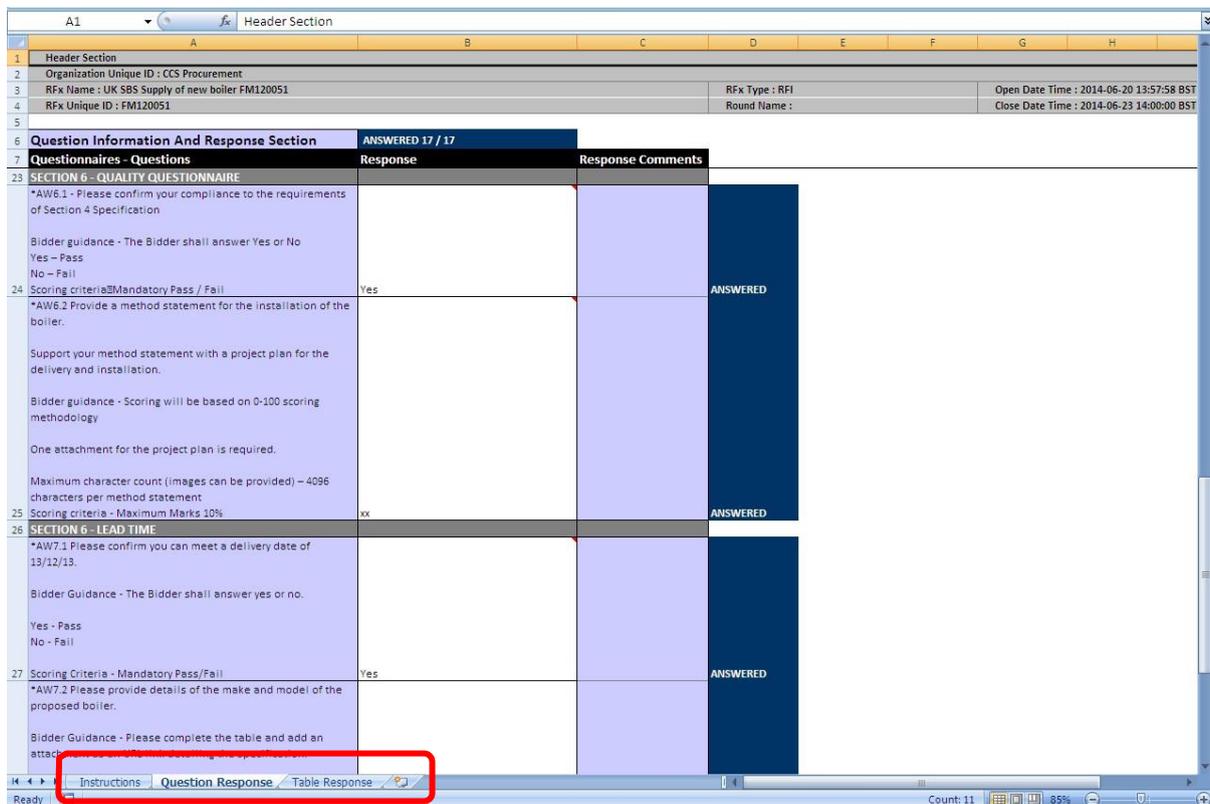
User	Job ID	Type	Description	Status	Time Submitted	Time Scheduled	Time Completed
Stokes, K...	124...	Integrati...	Export - ...	Running	23/06/201...		

Refresh

Once complete you can download the report.



Bidders should now be able to open a document which provides their text and table based responses as below. Note the report has three tabs.



The slides contained within this presentation were created using the Emptoris e sourcing suite and Internet Explorer 8.

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TEMPLATE VERSION CONTROL

Version	Date	Author(s)	Comment
1.0	05/12/2013	James Aldred	Final Version
1.1	23/06/2014	James Aldred	Updated with CCS branding.