

Suppliers Quick Start Guide for Responding to Online Tenders

Version 3.0 February 2009



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Please note: the purpose of this document is to provide a quick reference resource for Suppliers responding to their initial eTendering projects – it is not intended to be exhaustive.

For more detailed help please refer to the online help function (available at both process & screen specific levels).

»» Benefits of eTendering

- » Simple (free of charge) registration
- » View new business opportunities from both individual public sector organisations and pan-government opportunities
- » Access to your eTendering projects from any location, 24 hours a day, 365 days per year
- » Reduces procurement cycle time, bringing faster awarding decisions
- » Reduces the administrative burden when responding to tenders
- » Removes avoidable printing, postage and courier costs
- » Provides automated alerting and online tender status information
- » Provides secure real time communication with the Buyer
- » Provides audit trails of all tender milestones, tasks and communications
- » Support available via a Free-phone helpdesk

A Typical Public Sector Tender Process

(EU "Restricted" Process)

Buyers

- 1.1 Create OJEU notice and Current Opportunity online
- 1.2 Add instructions for suppliers on how to express interest
- 1.2 Issue electronically to publications office

- 2.1 Create PQQ questionnaire & publish to suppliers
- (typically it is Open Access to allow any registered supplier to express interest)

- 3.1 Assess responses & determine compliance
- 3.2 Suppliers are short listed to the invitation to tender (ITT) stage

- 4.1 Create ITT evaluation model
- 4.2 Create 'Technical Parameters' questionnaire (for non-price requirements)
- 4.3 Create Commercial Parameters (list of items for quotation)
- 4.4 Publish to short listed suppliers

- 5.1 Complete Technical & Commercial Evaluation of responses
- 5.2 Decision to: -BAFO, Award, Auction, Cancel, Suspend

- 6.1 **IF** going to auction Buyer determines the event structure and configuration
- 6.2 Issue terms & conditions document (inc structure, rules and FAQs)
- 6.3 Build live and practice events

- 7.1 Make award decision
- 7.3 Notify suppliers of outcome
- 7.4 Create & publish OJEU contract award notice

Created & Published at the same time

1.
OJEU
Notice

2.
Pre-
Qualification
Questionnaire
(PQQ)

3.
Evaluate
PQQ
Responses

4.
Invitation
to Tender
(ITT)

5.
Evaluate ITT
Responses

6.
eAuction
**-NOTE not all
tenders will
involve
eAuctions**

7.
Award
Contract

Suppliers

- 1.3 Suppliers see the tender on:
 - OJEU/TED, or
 - Buyers portal
- 1.4 Register on portal
- 1.5 Express Interest in PQQ

- 2.2 Complete Questionnaire as directed & publish
- (Note: this can involve online or attached document questionnaires – or both!)

- 3.3 Receive notification of short listing or exclusion

- 4.5 Receive email invitation
- 4.5 Complete Technical & Commercial Parameters' as directed
- 4.6 Use secure messaging for clarification
- 4.6 Publish response to Buyer

- 6.4 Confirm lot participation
- 6.5 Participate in training session
- 6.6 Participate in live event

Example Screen – Key Functions overview

Tabs & Sub Menus help you navigate between components (PQQs, ITTs etc)

The Legend clarifies screen icons and symbols (e.g. mandatory fields by the asterisk *)

Unique system generated tender and component codes help you to identify and search quickly (also useful when you speak with the BravoSolution help desk)

Response Details buttons help you navigate within a tender and its components (the shaded one is the screen you are currently in)

Action links allow you to perform general functions (such as Expressing Interest, or Export to Excel)

These type of Action links allow you to perform specific functions within in this particular screen (such as Edit , Save, Reset)

Attachments links allow you to attach documents as requested by the Buyer –
NOTE:

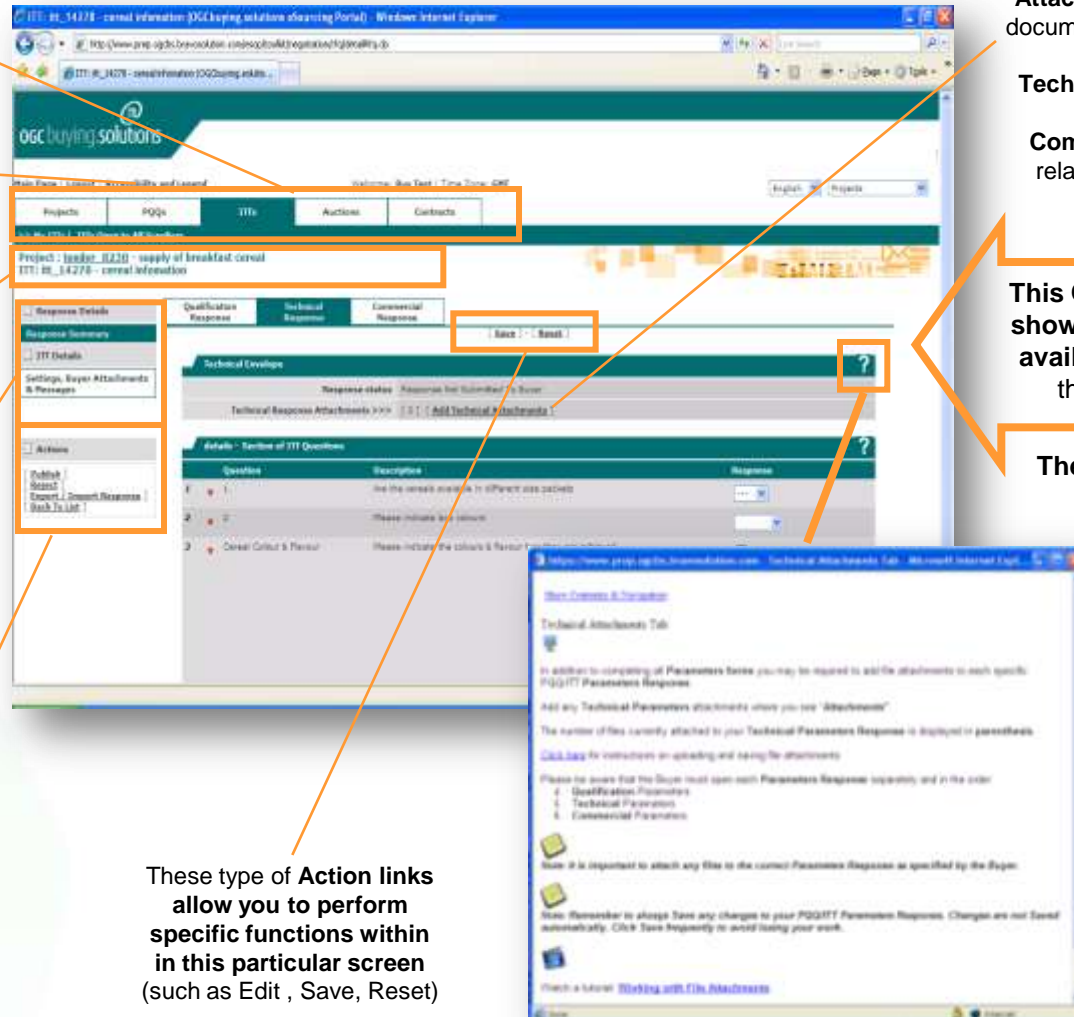
Technical Response is for non-price information,

Commercial Response is for price related information and quotations

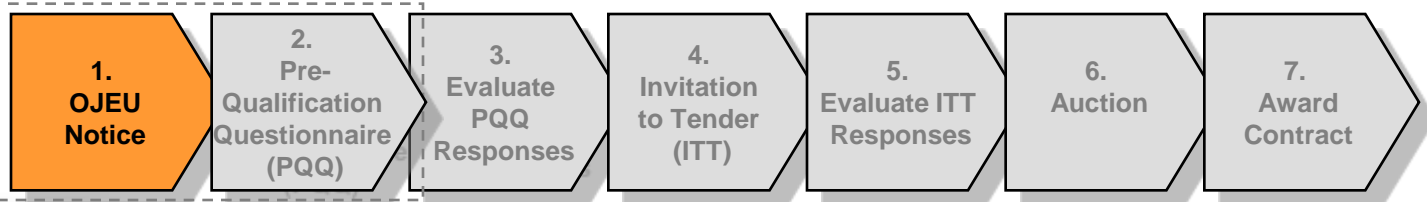
This Question Mark Icon – shows where online help is available (for guidance on this specific screen)

The online help function also contains;

Search functions
Glossaries
Process tutorials
(e.g. how do I Express Interest, or Respond to a PQQ)
Animated tutorials

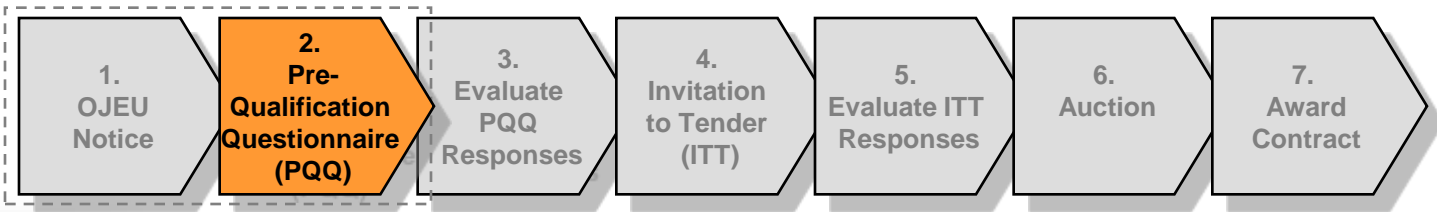


>>> 1. Notice



1. TED contains all active notices published in the Supplement to the Official Journal (OJ S). In addition to current tenders, **TED** also gives access to the OJ S archives for the past five years (<http://ted.europa.eu/>)
2. Current UK public sector tenders can also be viewed;
 - » For a specific Buying organisation – by navigating to their eSourcing Portal and clicking on the ‘View Current Opportunities and Notices’ link on the portal homepage.
 - » For multiple Buying organisations – by clicking on the ‘View current pan-government advertised opportunities’ link (on any OGCBuying.solutions accredited eSourcing Portal).
 - » Whilst this may not be a comprehensive list of all public sector tenders, it is particularly useful for identifying opportunities that fall below the EU spend thresholds.
3. When viewing opportunities online, you will see a link called: ‘Login or Register to Participate’ – this will take you to a screen allowing you to register on the Buying Organisations portal (or login if you have previously registered).
4. OJEU notices should contain instructions on how to express interest in a Tender/PQQ, – **see over for instructions:**

2. PQQ



1. In order to participate in online tenders it is necessary to:

- » Register on the buying organisations eSourcing portal
- » Express interest in the PQQ
- » Complete your response as directed

2. To register on the portal:

- » From the portal Home Page, click the 'Click Here to Register' link
- » Accept the terms & conditions for using the portal
- » Complete your organisation & personal details
- » Choose a memorable username and submit
- » You will shortly be sent an email with your unique password, please treat this securely (if you lose it there is a 'Forgot my Password' link on the portal homepage)

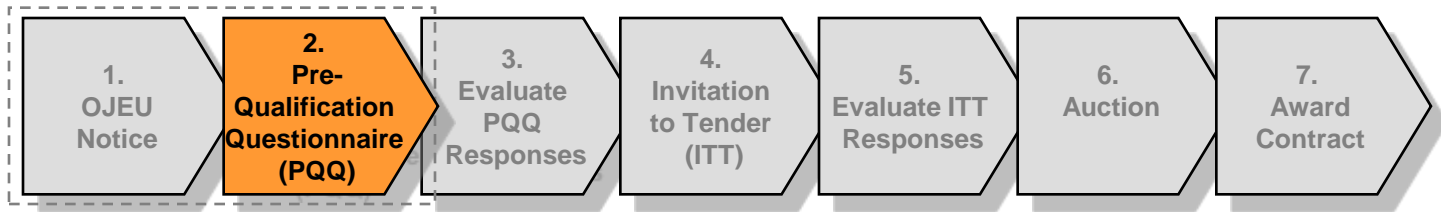
3. To Express Interest in the PQQ:

- » Login with your unique username & password
- » From the suppliers reserved area click '**PQQs Open to All Suppliers**' – this is a repository of all Tenders/PQQs open to any registered supplier.
- » Browse the PQQs (there may be more than one page) and select one by clicking on it
- » Note the Details buttons on the left for Navigation and the Actions below
- » Click the 'Express Interest' action – this will move the PQQ from the **PQQs Open to All Suppliers** area to your '**My PQQs**' area – this is a reserved area for PQQs that you have either been invited to or expressed interest in.
- » (If you were directly invited to participate in a PQQ it is not necessary to express interest – the PQQ will be in your '**My PQQs**')

Continued overleaf...



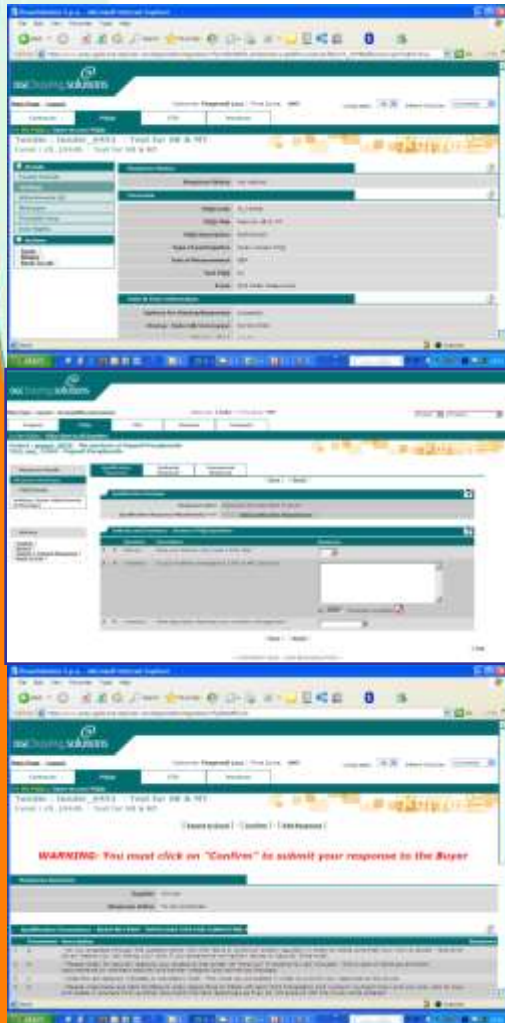
2. PQQ



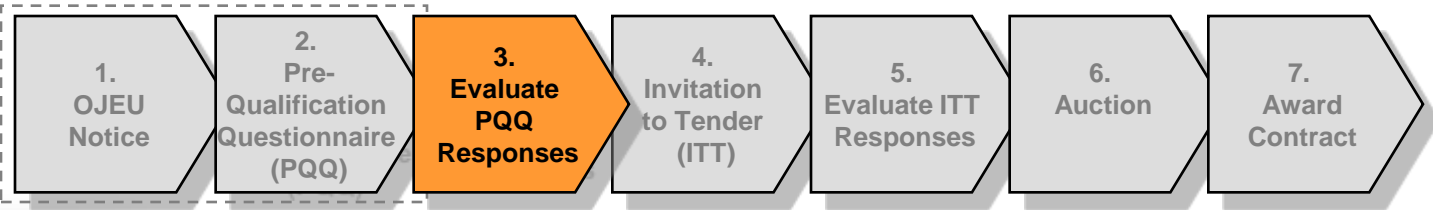
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4. To Complete your PQQ response:

- Download any attached documents that the buyer may have uploaded for you.
- Note any actions/deadlines (e.g. deadline for clarifications, PQQ closing date etc.),
- Important Note: A PQQ (or ITT) may be structured in different ways:
 - An online questionnaire (this is known as Qualification or Technical Questionnaire).
 - An attached document (usually in MS Word or Excel).
 - A mixture of both Questionnaires and attachments
- To continue click the 'Reply' action (or Reject if you do not wish to continue)
- Use the tabs in the Response screen to navigate through the Questionnaires:
 - **Qualification Response** – If the buyer uses this option it may take the form of a questionnaire or more likely some notes/tips on your response.
 - **Technical Response** – this is typically the main part of the PQQ and will consist of groups of (non-price) questions, work your way through these and don't forget to save your work and complete all mandatory fields.
 - **Commercial Response** – this is rarely used in a PQQ, (generally used at the ITT stage), but will consist of groups of items that require quotation – these items can be goods, services, supply scenarios etc.
- When completed click the 'Publish' action (& Confirm) to submit your response to the Buyer.
- You are able to review and edit your response up until the deadline – Note: if you choose to edit your response after the deadline you run the risk of it not being available to the Buyer when they open all responses
- Whilst the portal allows for large individual attachment sizes (max 50mb at a time), we recommend that you keep attachments to a manageable size to ensure ease & speed of access.
- Please attach files only into the Envelopes, and to the Questions, specified by the Buyer. When attaching files at Envelope level, upload non-price attachments into your 'Technical Response' and price attachments into the 'Commercial Response' page. When the Buyer has asked for an attachment at Question level, upload the file to the correct Question in order to complete your response.



3. PQQ Evaluation

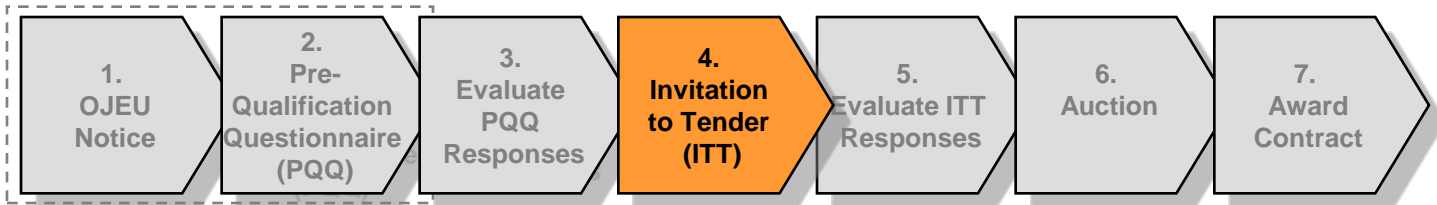


Once the deadline has passed the Buyer can then open the supplier responses, here are some tips to help you maximise your evaluation score:

1. Try to answer all questions (even those not flagged 'Mandatory')
2. Follow the Buyers directions and deadlines
3. Double check that you have answered all questions and provided all evidence and data requested (e.g. Annual Reports).
4. Make sure that you have attached any requested documentation in the correct area, typically this will be:
 - » Technical Response for non-price related information (including financial viability information, such as copies of annual reports).
 - » Commercial Response for price related information and quotes.
5. All communications should be directed as follows:
 - » Tender related (e.g. documentation, requirements, specification etc.) should be directed to the Buyer via the online secure messaging tool.
 - » Software related refer to the online help in the first instance, if this does not resolve your issue email or phone the BravoSolution helpdesk.
6. Don't leave your response until the last minutes/hours before the deadline – there will generally not be enough time for:
 - » The Buyer to answer any questions
 - » The Helpdesk to resolve any technical problems

Late responses are normally not accepted by the Buyer and you risk being rejected from the tender

4. ITT

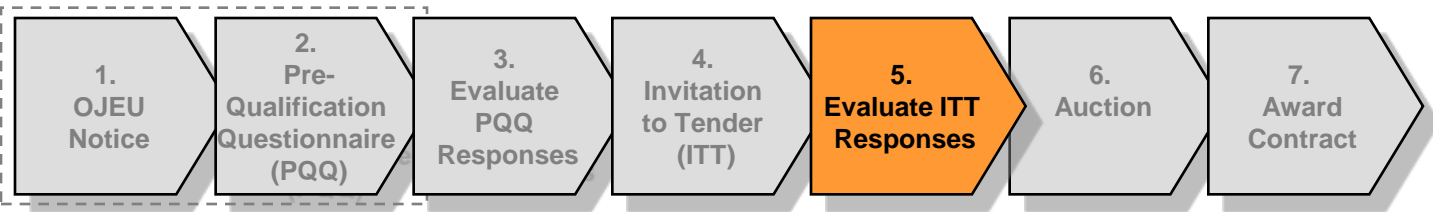


On receipt of the invitation email, complete your ITT response:

1. Navigate to your '**My ITTs**' area of the portal & select the ITT by clicking it
2. Download any attached documents that the buyer may have provided for you, (note mass download requires a Java plug-in, if you cannot use this download individually).
3. Note any actions and deadlines (e.g. last date for clarifications & the PQQ closing date),
4. (Like a PQQ) an ITT may be structured in different ways:
 - » An online questionnaire (this is known as Qualification or Technical Parameters).
 - » An attached document questionnaire (in MS Word or Excel).
 - » A mixture of both
5. To continue click the 'Reply' action (or 'Reject' if you do not wish to respond)
6. As with the PQQ use the tabs in the Response screen to navigate to:
 - » **Qualification Response** – If the buyer uses this option it may take the form of a questionnaire or more likely some notes/tips on your response.
 - » **Technical Response** – groups of (non-price) questions, work your way through these, don't forget to save your work & complete all mandatory fields.
 - » **Commercial Response** – groups of items that require quotation – these items can be goods, services, supply scenarios etc. – typically you will be required to quote against **ALL** items in order to respond
7. When you have completed your response click the 'Publish' action (& confirm) to submit it to the Buyer.
8. You are able to review and edit your response up until the deadline – Note: if you choose to edit your response after the deadline you run the risk of it not being available to the Buyer when they open all responses.
9. Whilst the portal allows for large individual attachment sizes (max 50mb at a time), we recommend that you keep attachments to a manageable size to ensure ease & speed of access.
10. Please attach files only into the Envelopes, and to the Questions, specified by the Buyer. When attaching files at Envelope level, upload non-price attachments into your 'Technical Response' and price attachments into the 'Commercial Response' page. When the Buyer has asked for an attachment at Question level, upload the file to the correct Question in order to complete your response.



5. ITT Evaluation



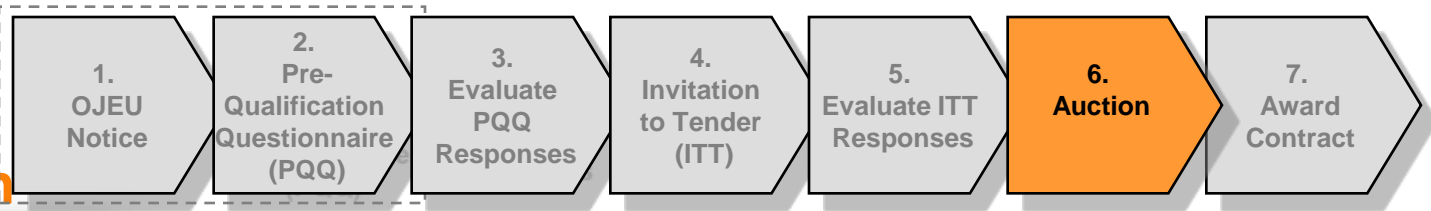
(As with the PQQ) once the deadline has passed the Buyer can then open the supplier responses, here are some tips to help you maximise your evaluation score:

1. Try to answer all questions (even those not flagged 'Mandatory').
2. Follow the Buyers directions and deadlines.
3. Double check that you have answered all questions and provided all evidence and data requested (e.g. Annual Reports).
4. Make sure that you have attached any requested documentation in the correct area, typically this will be:
 - » Technical Response for non-price related information (including financial viability information, such as copies of annual reports).
 - » Commercial Response for price related information and quotes.
5. Clarification communications should be directed as follows:
 - » Tender related (e.g. documentation, requirements, specification etc.) should be directed to the Buyer via the online secure messaging tool.
 - » Software related refer to the online help in the first instance, if this does not resolve your issue email or phone the BravoSolution helpdesk.
6. Don't leave your response until the last minutes/hours before the deadline – there will generally not be enough time for:
 - » The Buyer to answer any questions.
 - » The Helpdesk to resolve any technical problems.

Late responses are normally not accepted by the Buyer and you risk being rejected from the tender



>>> 6. eAuction

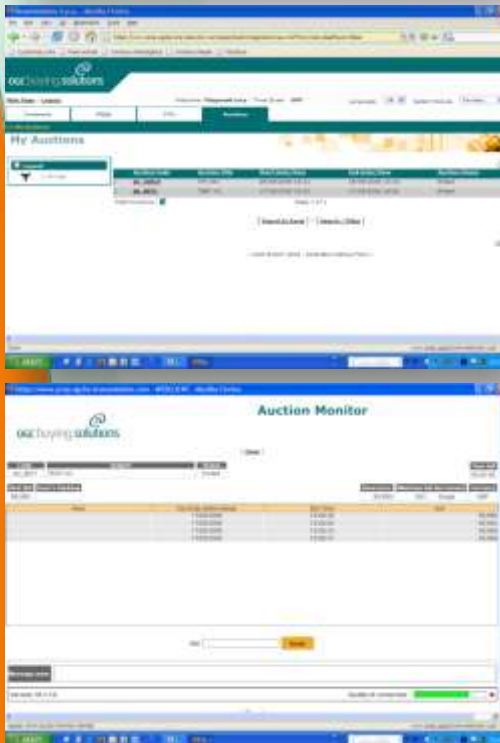


The eTendering tool allows tenders to be negotiated via electronic reverse Auctions (or ‘eAuctions’).

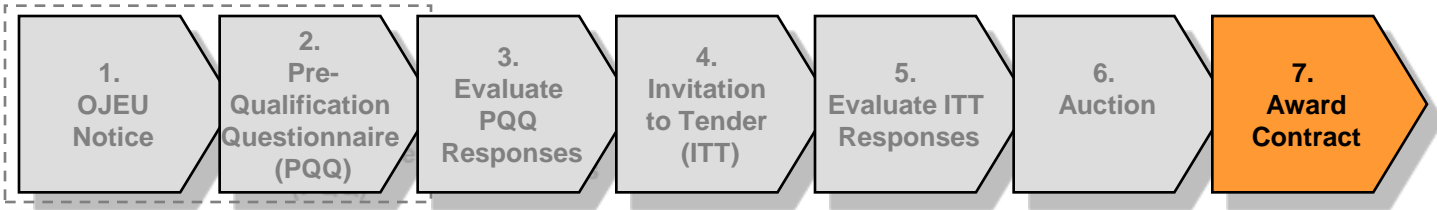
Important Note: Not all tenders will be auctioned, if there is a possibility that an eAuction will be used, this will have been stated in the OJEU Notice (if above EU thresholds).

Notes:

- » eAuctions form part of the overall public sector tender process and are used to negotiate the price element of a tender.
- » Non-price elements are captured during the ITT stage and form part of the overall evaluation.
- » There are a number of different ways that auction events can be structured, suppliers that are invited to participate in an eAuction will be given a full briefing documentation (containing information, help details, FAQs, etc.) and full software training (including participating in a practice event) prior to the live auction.



7. Award



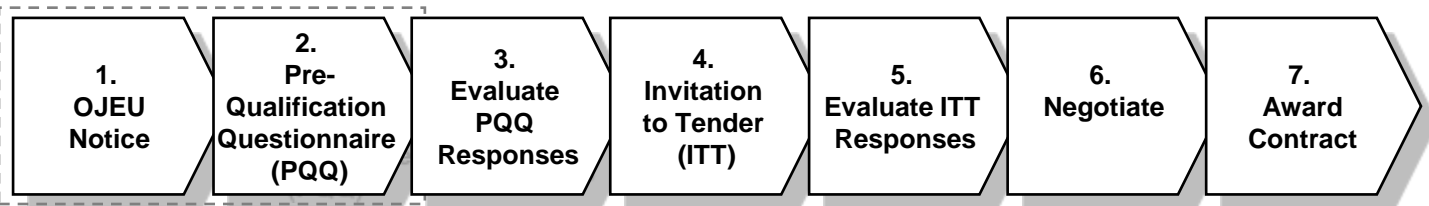
Once the Buying team has completed the total evaluation an award decision is normally made. Notification of the award decision can be received in a number of ways (either solely or in combination):

- » An automated system generated email alert
- » An Email from the Buyer
- » A secure message from the Buyer via the portal

If you require feedback on the award decision please direct all communications to the Buyer via the secure messaging tool in the eSourcing Portal.



»» Top Tips



1. **Use the online 'Help' function** – it provides support for both the screen you are in and for key processes, e.g. 'How to Express Interest' (it also has a help function and glossary).
2. **Plan your response, don't leave it until the last minutes/hours before the deadline, late responses are generally not accepted.**
3. Always read and digest any instructions/attachments prior to your response – note any deadlines and actions in your diary.
4. If the Buyer makes a change to a live tender suppliers **MUST** re-publish their response – this is to ensure that changes are brought to your attention – you will receive a message prompt from the Buyer – generally this will not mean re-entering information.
5. Whilst the portal allows for large individual attachment sizes (max 50mb at a time), we recommend that you keep attachments to a manageable size to ensure ease & speed of access. Only attach documents that the Buyer has requested.
6. Please attach files only into the Envelopes, and to the Questions, specified by the Buyer. When attaching files at Envelope level, upload non-price attachments into your 'Technical Response' and price attachments into the 'Commercial Response' page. When the Buyer has asked for an attachment at Question level, upload the file to the correct Question in order to complete your response.
7. Use the secure messaging to communicate with the Buyer and seek clarifications – this will give you an audit trail of all discussions/clarifications.
8. If you have any software related queries refer to the online help in the first instance. If you still have an issue email or phone the Bravosolution helpdesk with a Project reference, a clear description of the problem and your contact details (ensure that you leave plenty of time for issues to be resolved prior to any deadlines),
9. The portal is a secure site and (similar to online banking) you will be logged out if you are inactive for more than 15 minutes, so make sure you save your work as you progress through your response.
10. Use the 'Legend' to understand icons, note text responses are deliberately capped at 2000 characters – if the Buyer requires a larger response they will add an additional text box. Note: Numeric fields will not accept text, spaces, symbols.
11. Supplier sub-users can be set up on the system to allow colleagues to be involved with various stages of the tender – see the online help function for details.

For further information or assistance please refer to online help/ manuals in the first instance.

If this does not resolve your query, please contact your internal champion or email our helpdesk on:

Tel: 0800 011 2470

Fax: 020 7060 0480

E-Mail: help@bravosolution.co.uk

Thank You

