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:

UK SBS Halley Research Station garage rewire RFI

. Government Procurement Service

from Government Procurement Service eSourcing

sent you the following message:

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.

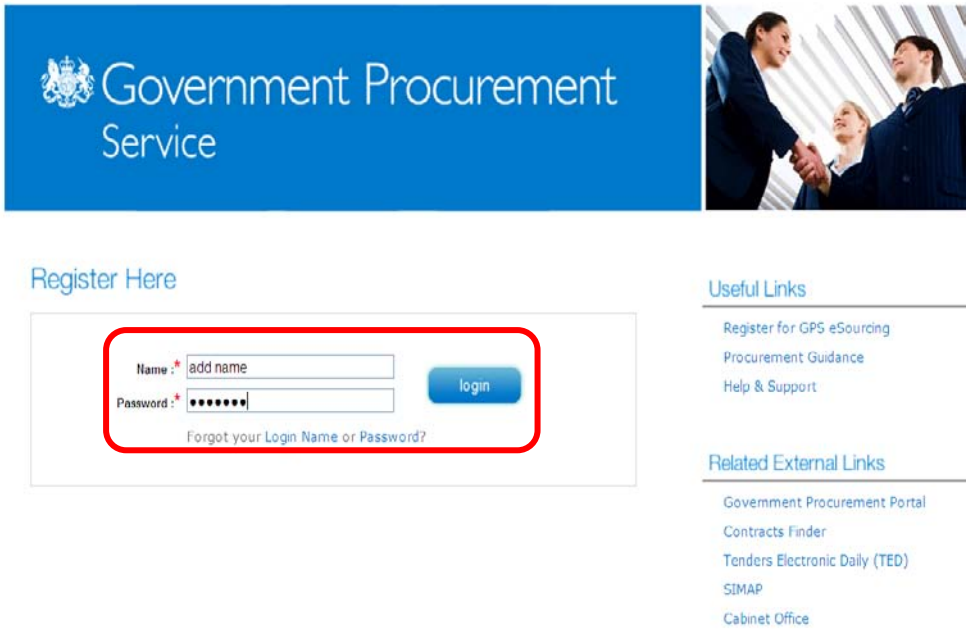
Here are your login instructions and contact at UK SBS

Please do not hesitate to contact [redacted] for further information.

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

Login URL

Bidders will now need to login to the system.



Bidders will now need to review the general terms for the esourcing suite.

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

Government Procurement Service eSourcing Suite

Supplier System Usage Agreement

Version 2.0

General Terms

1. Introduction

1.1. This User Agreement between the Government Procurement Service (the Buyer) and the Supplier governs the access and use of the eSourcing System (the System) by the Supplier to respond to an invitation from the Buyer to participate in a procurement exercise.
1.2. 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.
1.3. The System is provided by Emptoris Inc. 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.
1.4. 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

2.1. 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.
2.2. 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:
2.2.1. The Supplier commits a material breach of any of its obligations under this User Agreement; and
2.2.2. 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.
2.3. 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

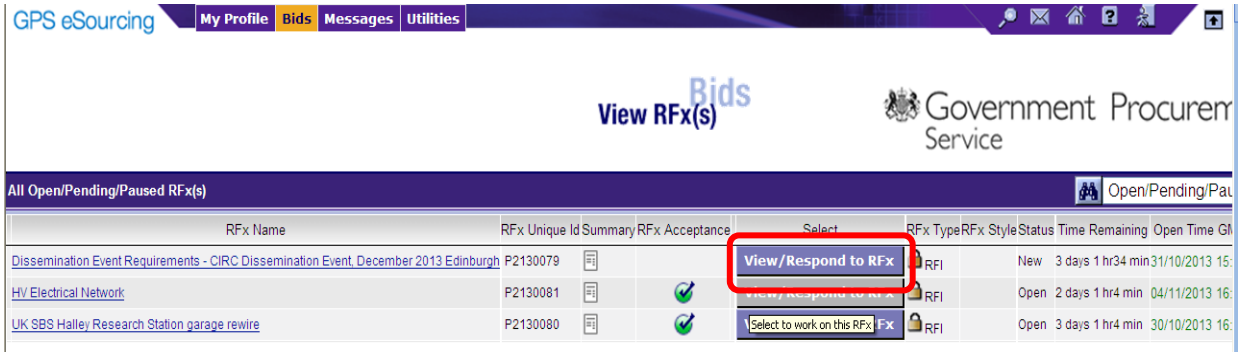
3.1. To be granted access to the System, the Supplier must register each person which the Supplier wishes to be a Supplier User by providing the required registration data and specifying a user ID and password.
3.2. User ID and password are strictly personal to the Supplier User and non-transferable. 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.

ESOURCING USE AGREEMENT

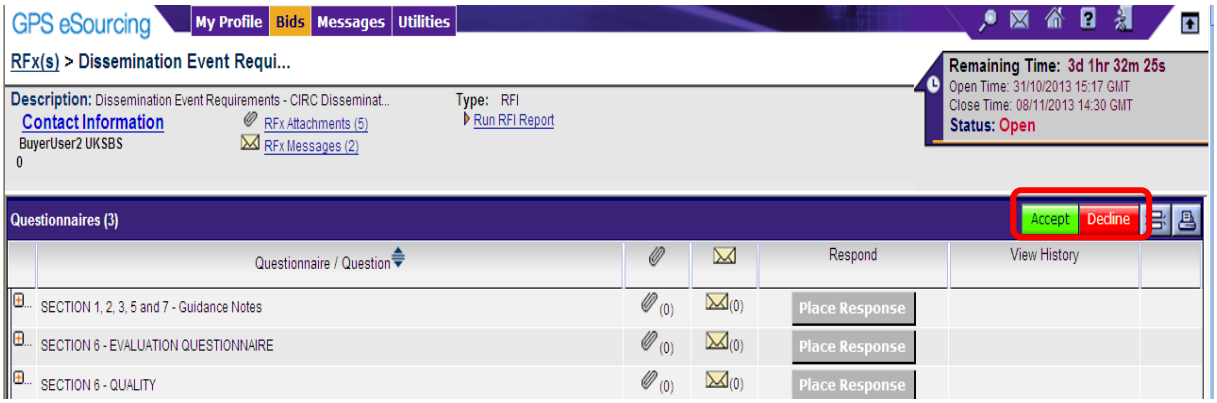
I Agree | I do NOT Agree

3. COMMITING 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:



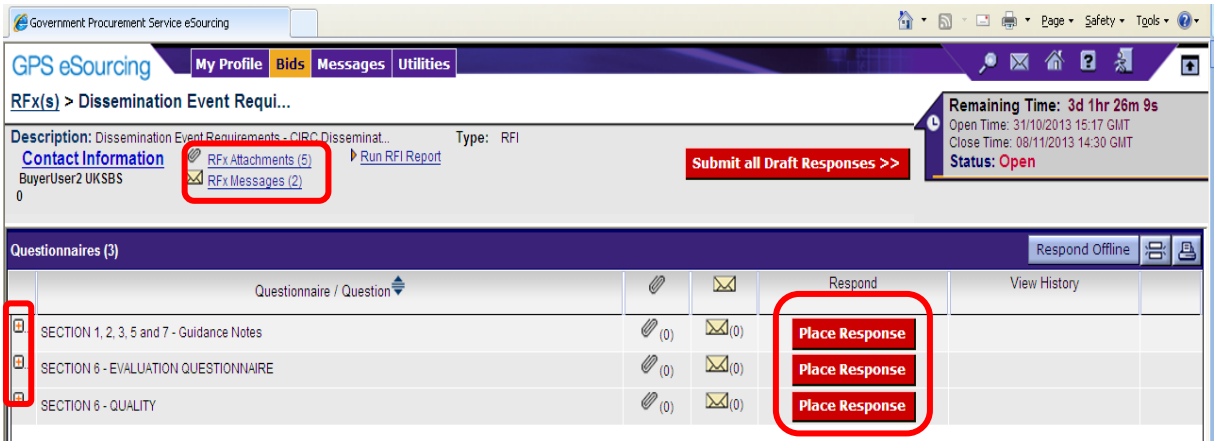
4. REVIEWING RFx ATTACHMENTS

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.

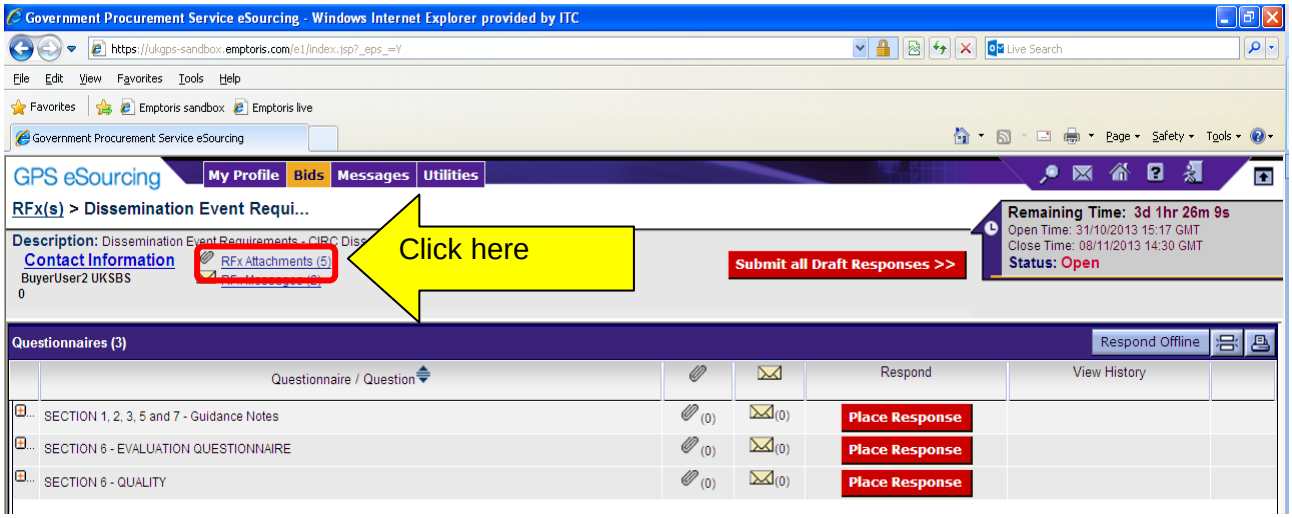


It is **STRONGLY** recommended that prior to commencing with completion of the questionnaire responses Bidders review all of the RFx attachment so they have a clear understanding of the requirement, evaluation model, price schedule, contract terms, and any associated attachments to questions.

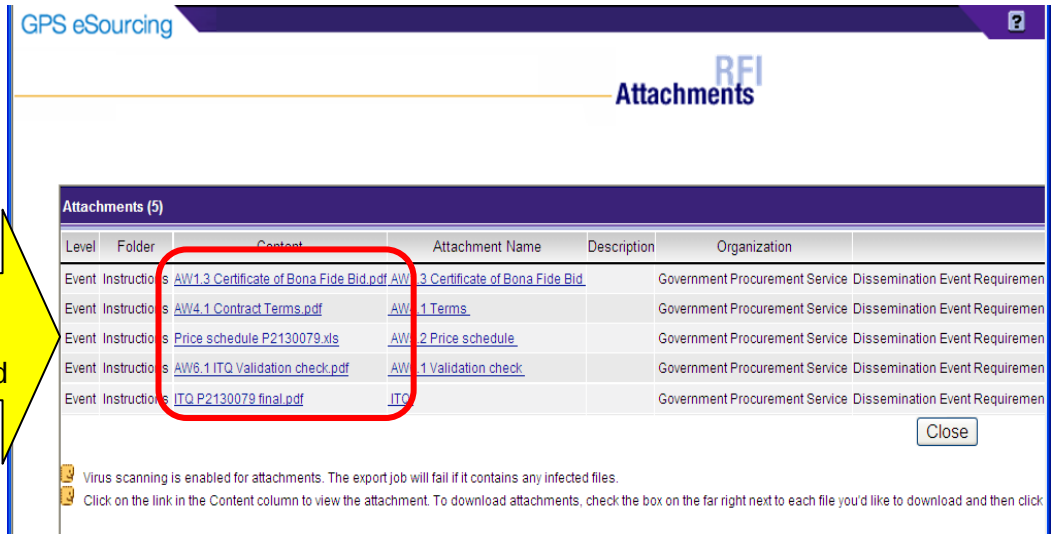
Generally attachments to questions will have a naming convention at the start of the attachment name (e.g. AW5.2 Price Schedule) to help Bidders associate the attachment with the relevant clarification.

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:

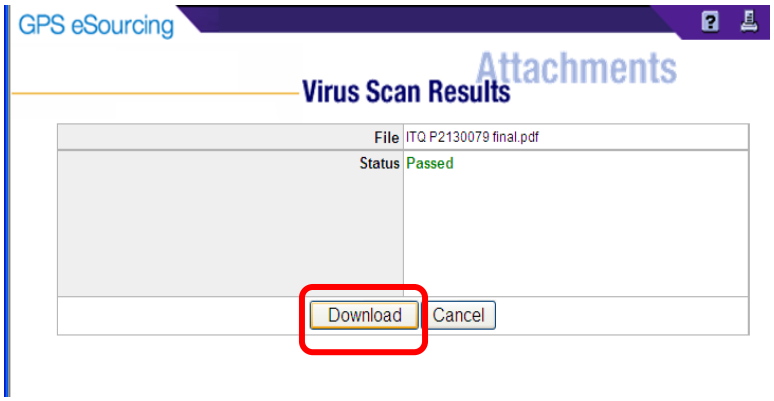


Bidders will see a screen like this:



Click on content link to download

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



5. REVIEWING RFx MESSAGES

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

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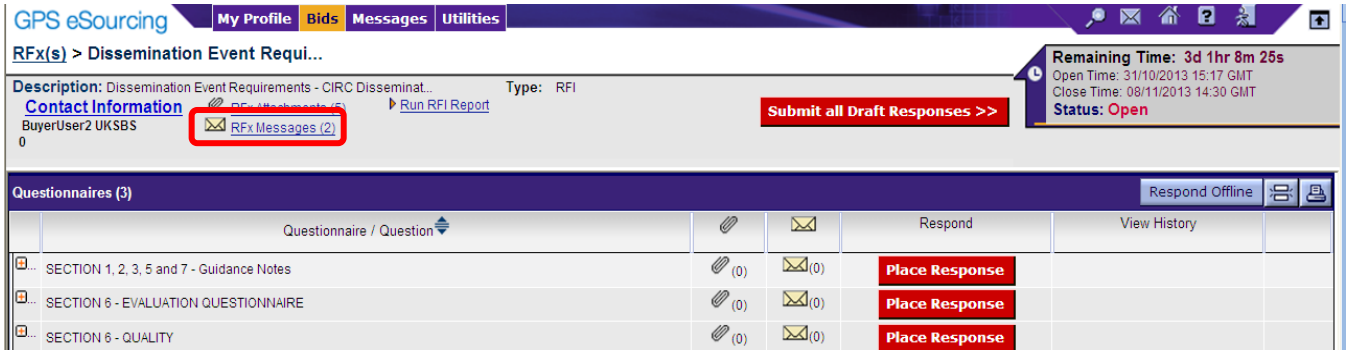


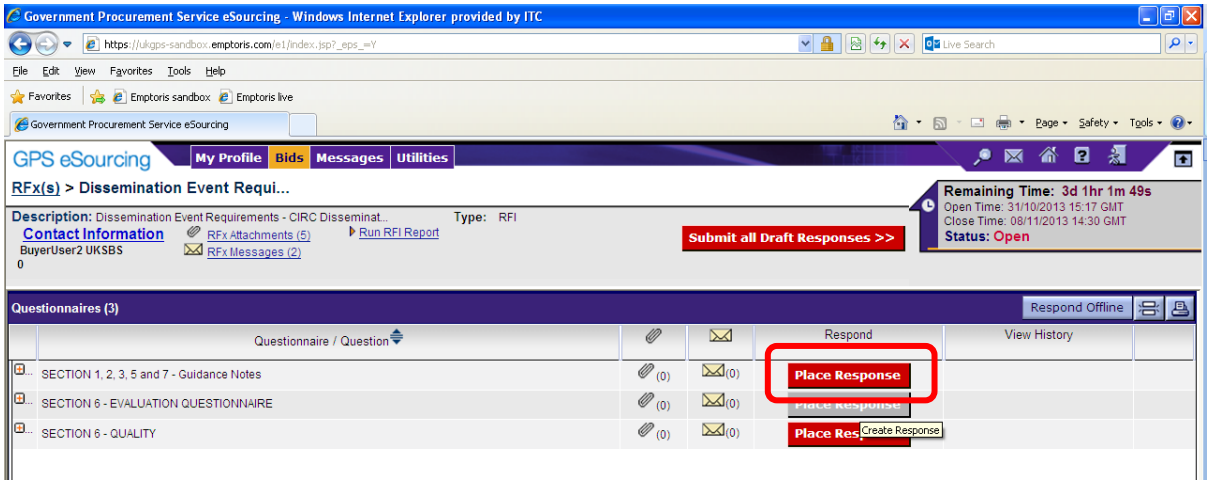
All received messages are in the 'Received messages' folder.
All messages sent are in the 'Sent messages' folder.
All standard system related messages are in the 'Broadcast messages' folder.

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.



They will then face a screen with questions:

Typically the questions will detail:

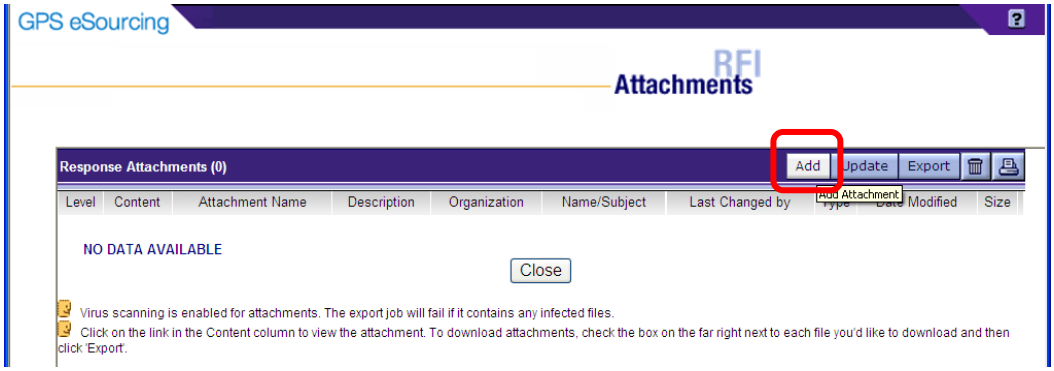
- The question number – these are NOT sequential so do not think there are questions missing.
- The question detail

- 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.

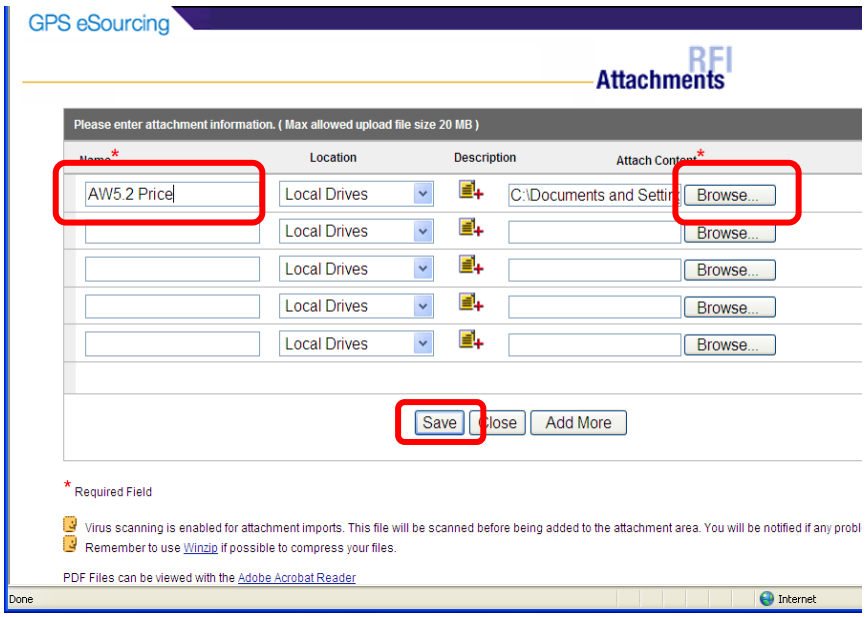
ALL QUESTIONS WILL NEED TO HAVE SOME TEXT ENTERED IN ORDER TO SAVE YOUR ANSWERS.

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.



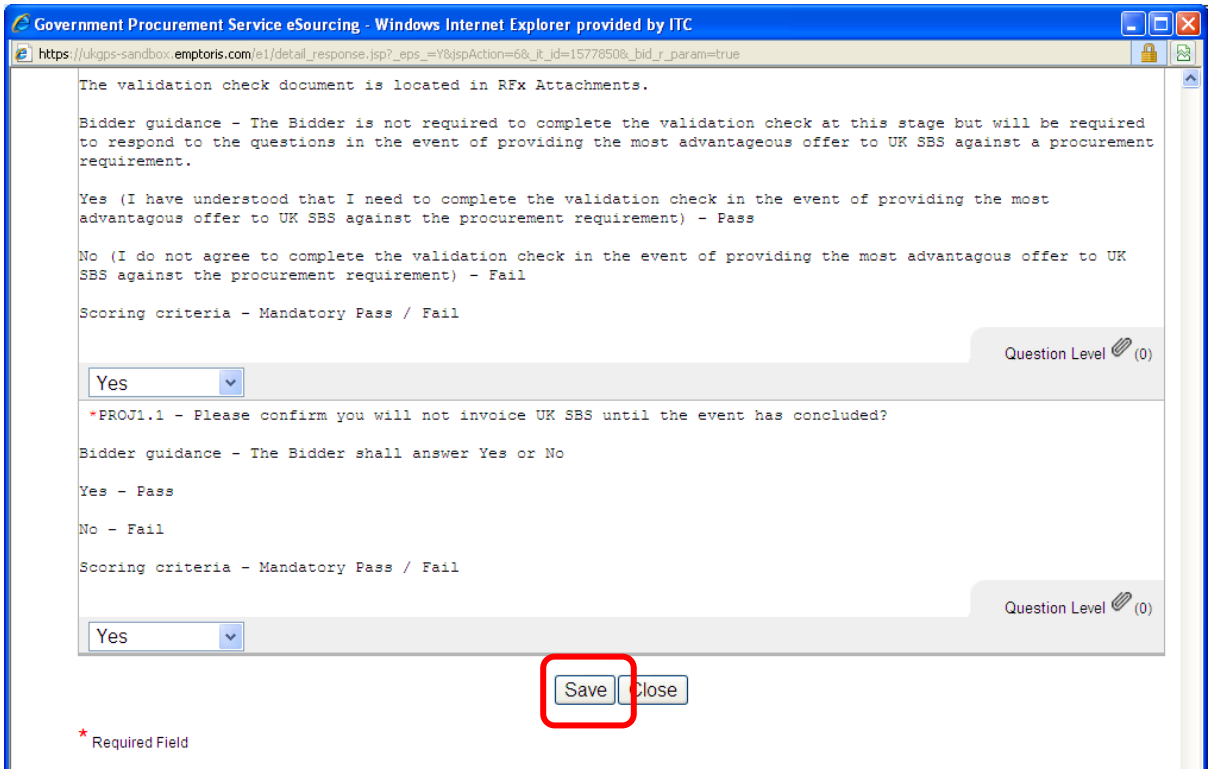
Bidders can add an attachment by clicking on browse and finding their file on their local PC or shared drive. They can change the name presented to UK SBS. It is **STRONGLY** recommended the Name commences with the question reference (e.g. AW5.2) to ensure we can effectively cross refer answers.



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.

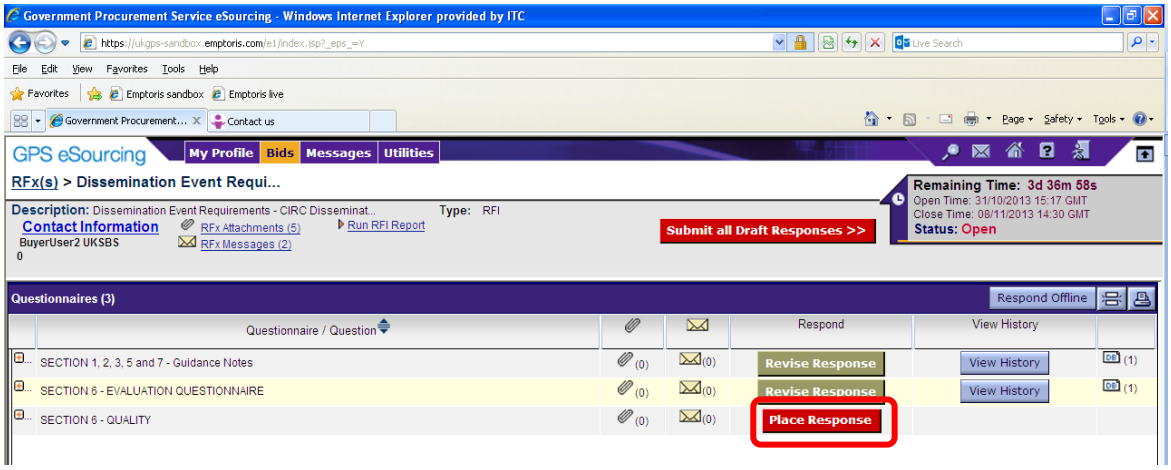


If Bidders do not fill in the entire form you will receive a message which says:

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.

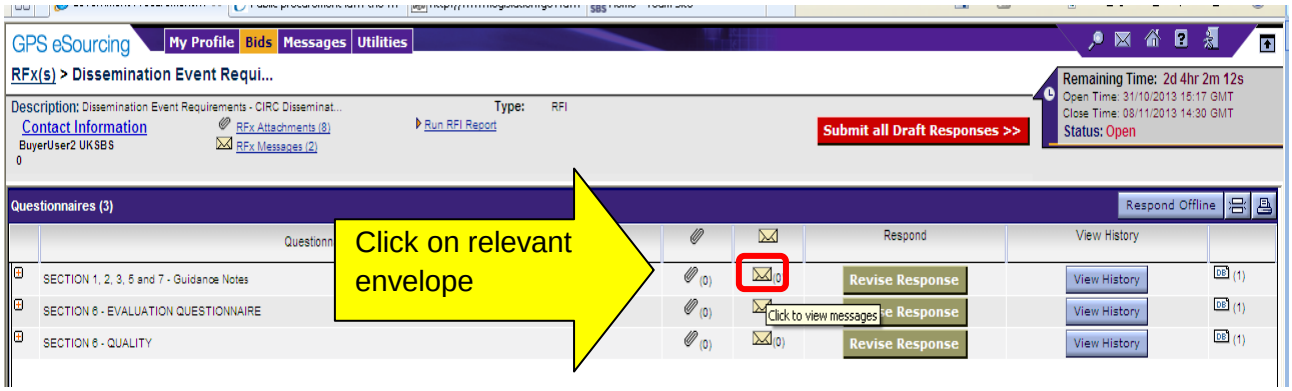


Once all questionnaires are completed you can submit them.

7. RAISING CLARIFICATIONS

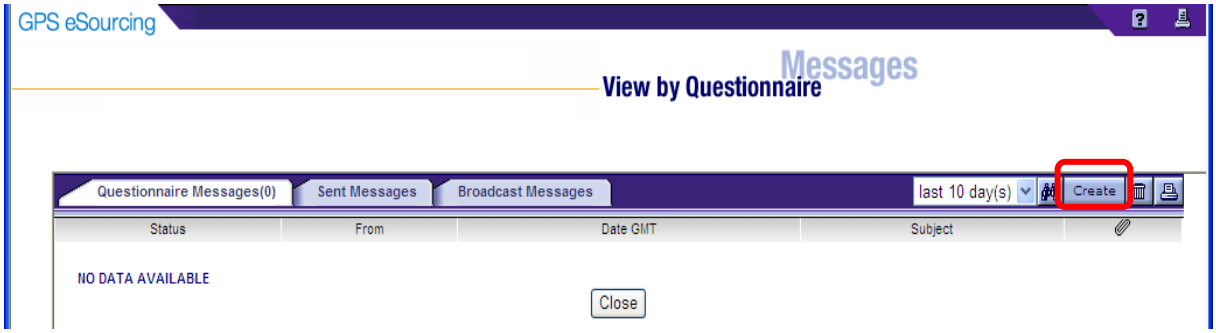
Clarifications can be raised easily in two ways, irrespective of the approach taken it is **crucial** that Bidders cross reference their clarification to the relevant question number.

Clarification at questionnaire level.

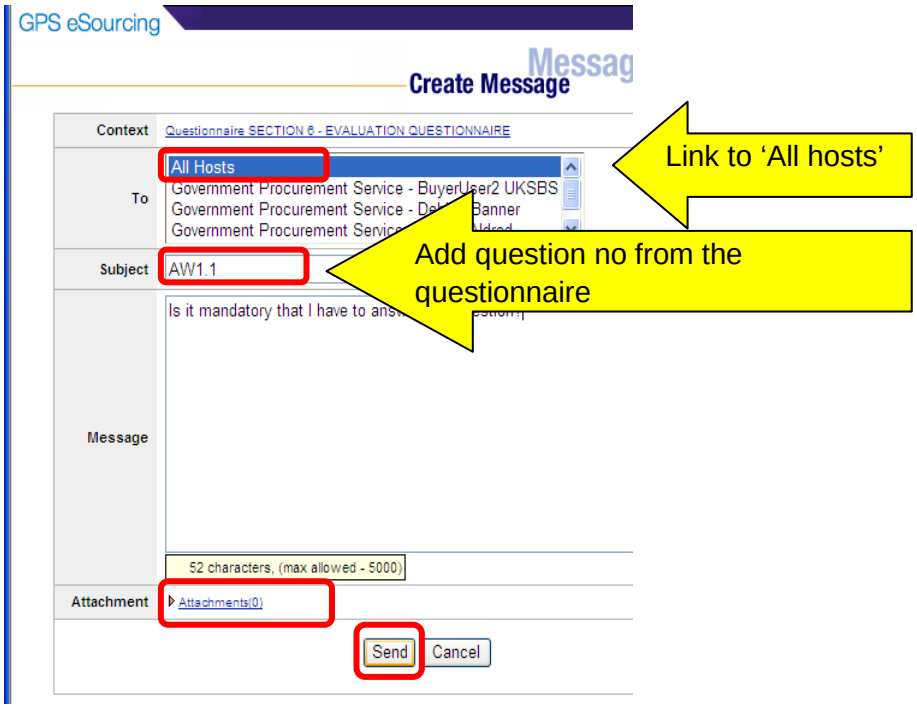


You will always see a screen like this with messages in (questionnaire messages), your messages (sent messages) and system messages (broadcast message).

To raise a clarification click on ‘Create’

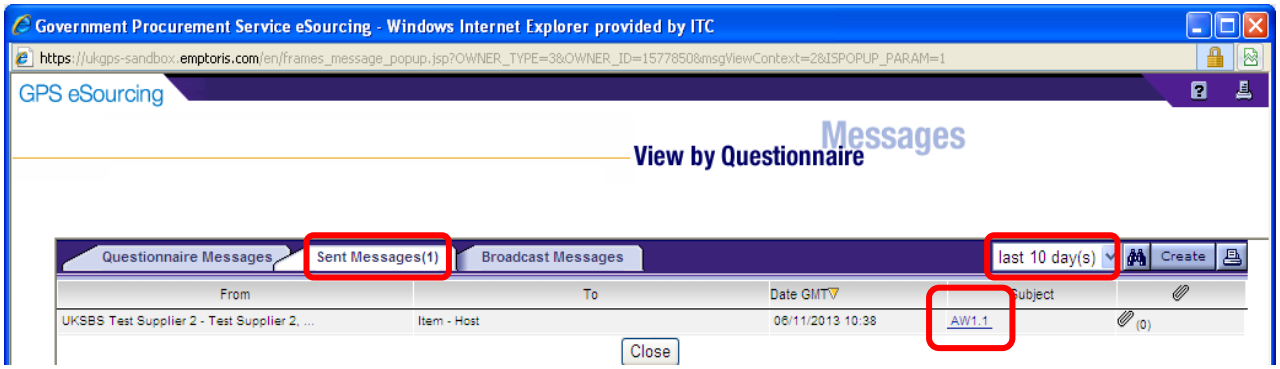


You will now be able to upload your message and any attachments. Always send to ‘All hosts’. Remember to cross reference to the question number and to ‘send’ the document.

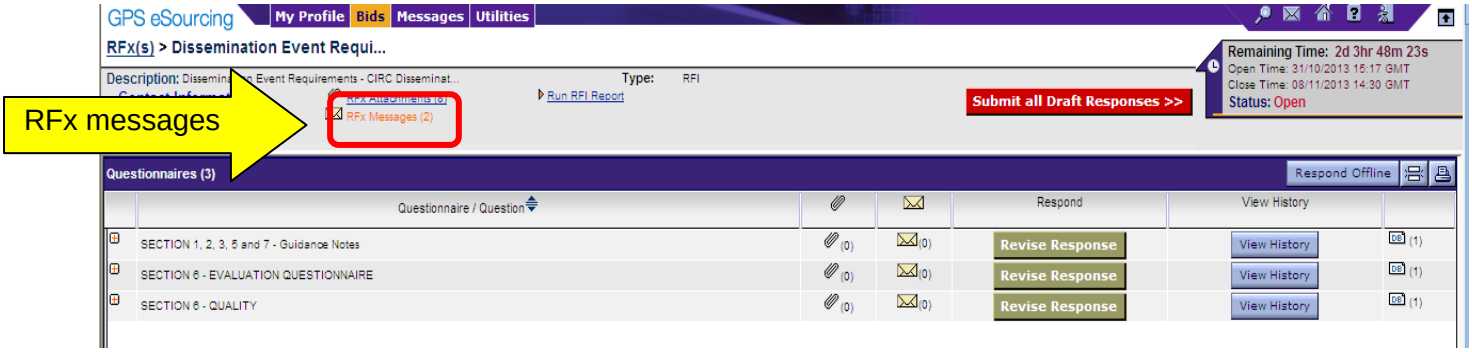


Bidders can view the question in the sent messages.

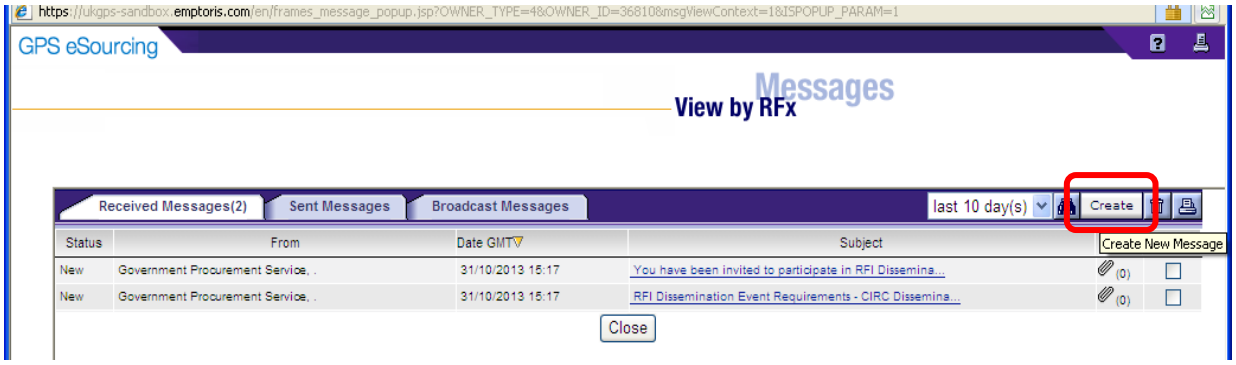
They can also filter against all questions, last 30 days, 10 days or last day



Alternatively Bidders can raise clarifications through RFx messages:

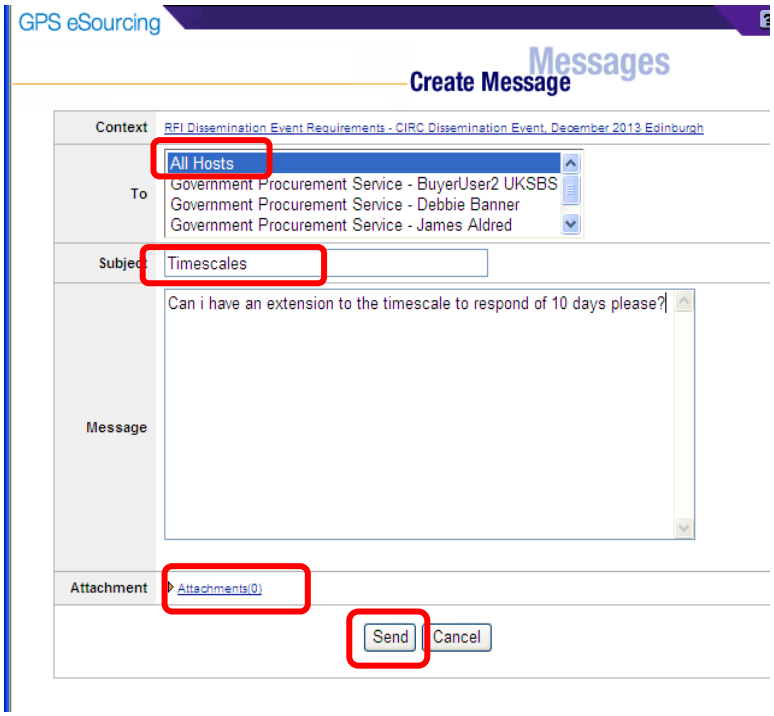


In RFx messages the process is similar to the questionnaire clarifications. Click on ‘create’ to send a new message.



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

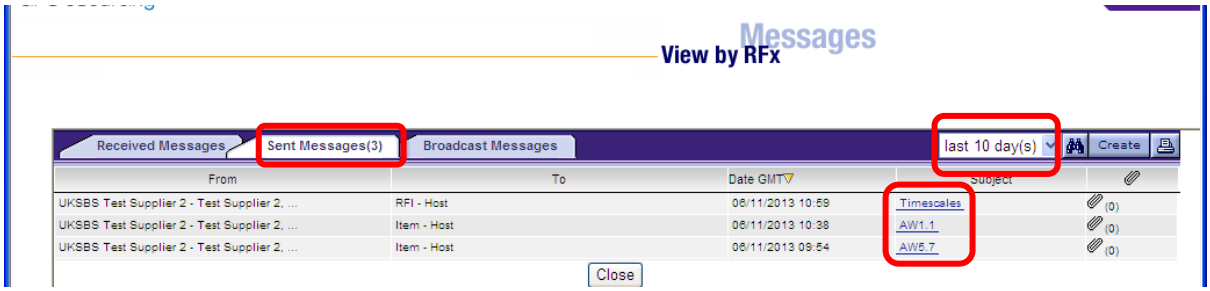
In this example it is a general clarification and not associated to a specific question. Remember Bidders can add attachments and must always ‘send’ the clarification.



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

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

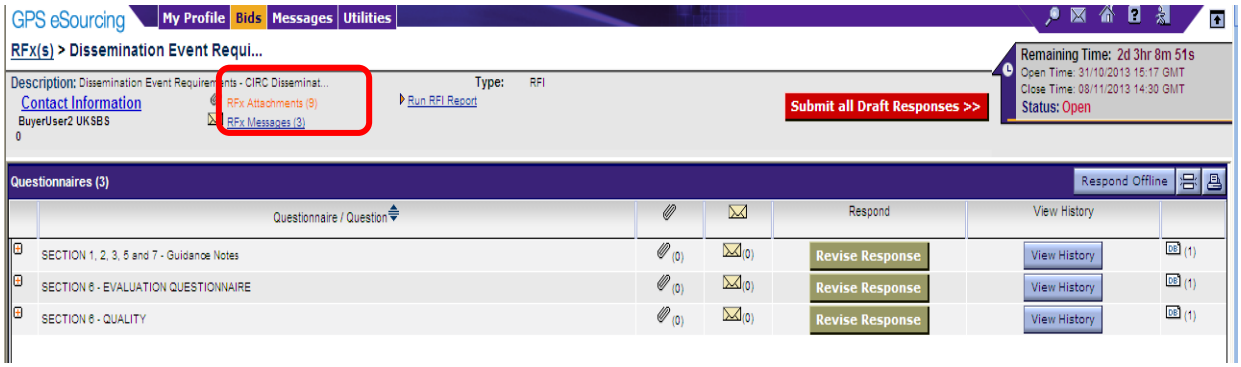
The filtering of messages against 1, 10, 30 days or all is still available in this view.



8. RECEIVING CLARIFICATIONS

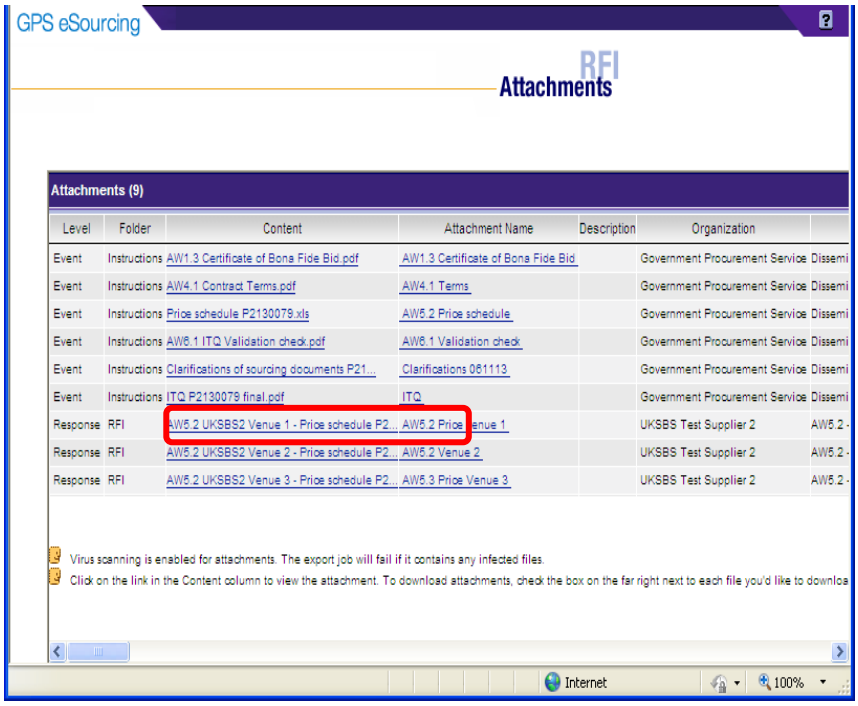
Regularly check the RFX attachments folder for clarifications to the procurement. There maybe associate messages also in RFx messages to review.

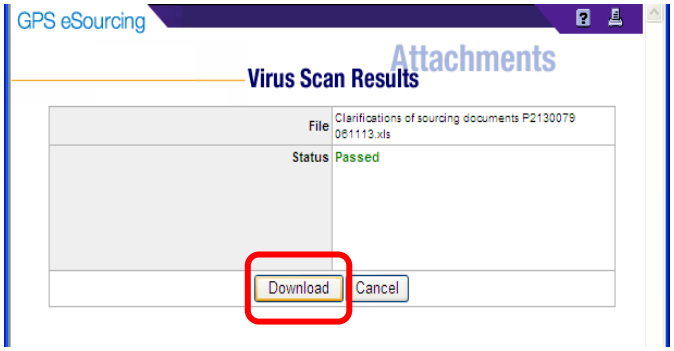
Note it is the Bidders responsibility to check for clarifications.



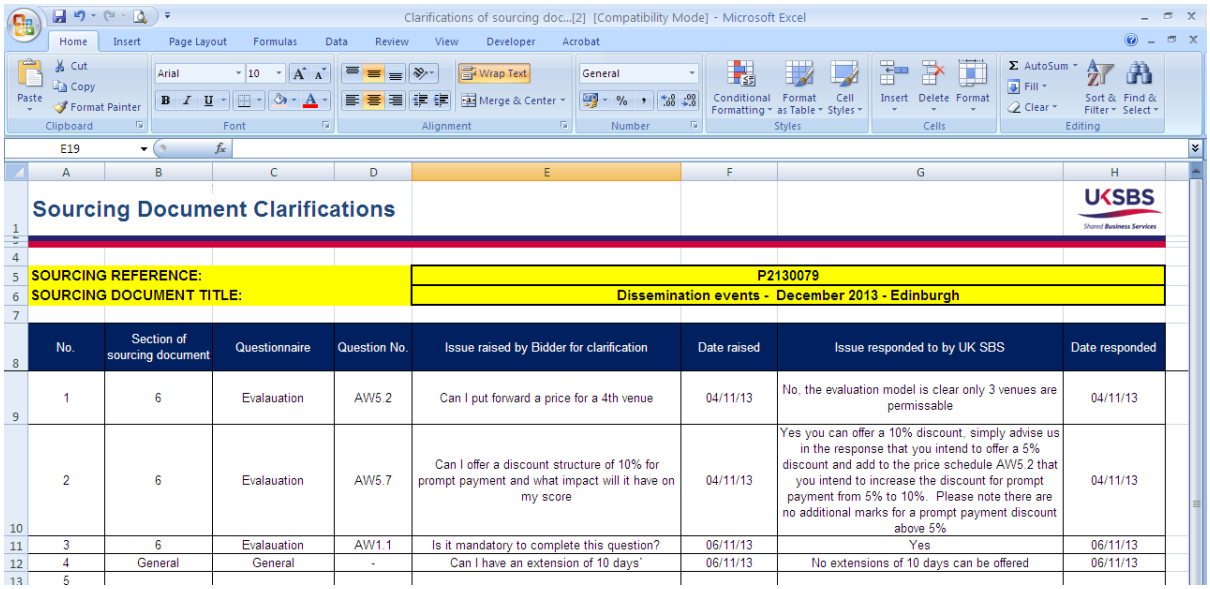
Clarifications will generally be called ‘Clarifications [project number] [date]’. Generally only the latest set of clarifications will be uploaded.

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





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



Clarifications of sourcing doc...[2] [Compatibility Mode] - Microsoft Excel

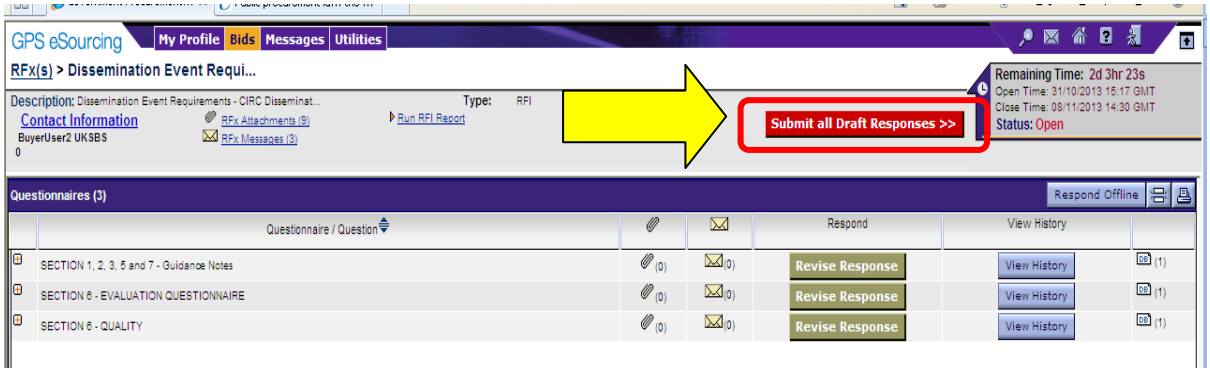
Sourcing Document Clarifications

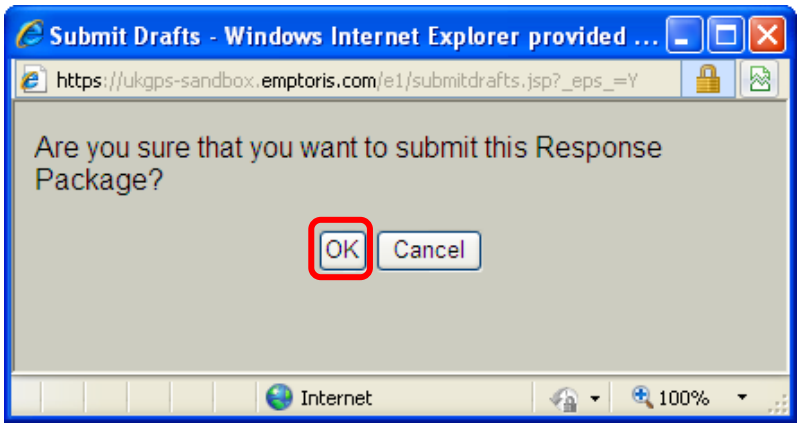
SOURCING REFERENCE:	P2130079
SOURCING DOCUMENT TITLE:	Dissemination events - December 2013 - Edinburgh

No.	Section of sourcing document	Questionnaire	Question No.	Issue raised by Bidder for clarification	Date raised	Issue responded to by UK SBS	Date responded
1	6	Evalauation	AW5.2	Can I put forward a price for a 4th venue	04/11/13	No, the evaluation model is clear only 3 venues are permissable	04/11/13
2	6	Evalauation	AW5.7	Can I offer a discount structure of 10% for prompt payment and what impact will it have on my score	04/11/13	Yes you can offer a 10% discount, simply advise us in the response that you intend to offer a 5% discount and add to the price schedule AW5.2 that you intend to increase the discount for prompt payment from 5% to 10%. Please note there are no additional marks for a prompt payment discount above 5%	04/11/13
3	6	Evalauation	AW1.1	Is it mandatory to complete this question?	06/11/13	Yes	06/11/13
4	General	General	-	Can I have an extension of 10 days`	06/11/13	No extensions of 10 days can be offered	06/11/13
5							

9. SUBMITTING YOUR BID

Once you have answered all questions and uploaded all your attachments you can submit your draft response.

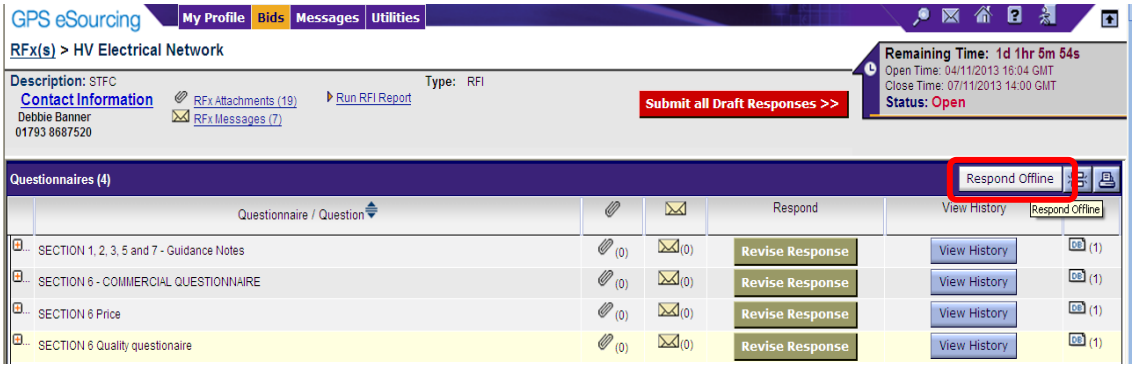




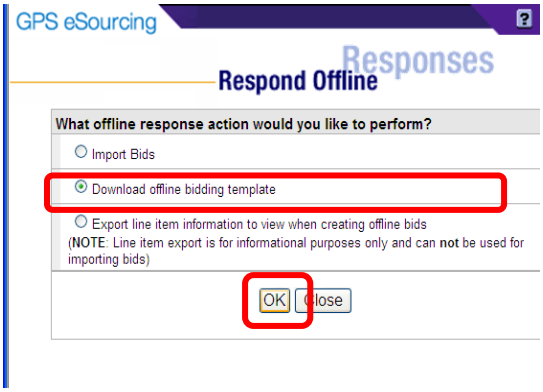
Questionnaire responses can be updated at any time up to the closing date; however each time you update the questionnaire responses **YOU MUST RESUBMIT YOUR RESPONSE.**

10. DOWNLOADING YOUR RESPONSE

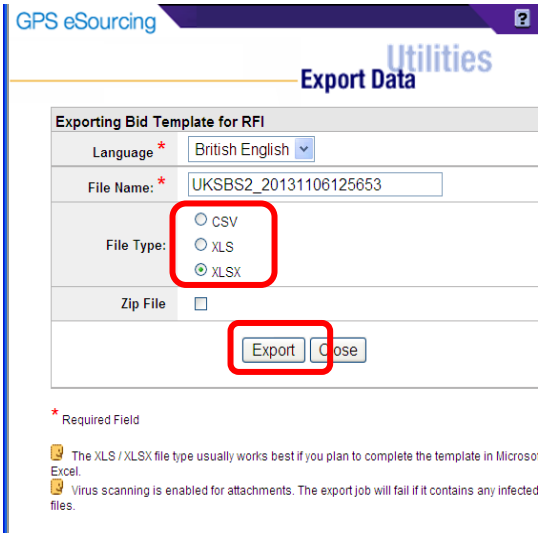
You can download your text responses to the questionnaire by simply clicking on 'Respond offline':



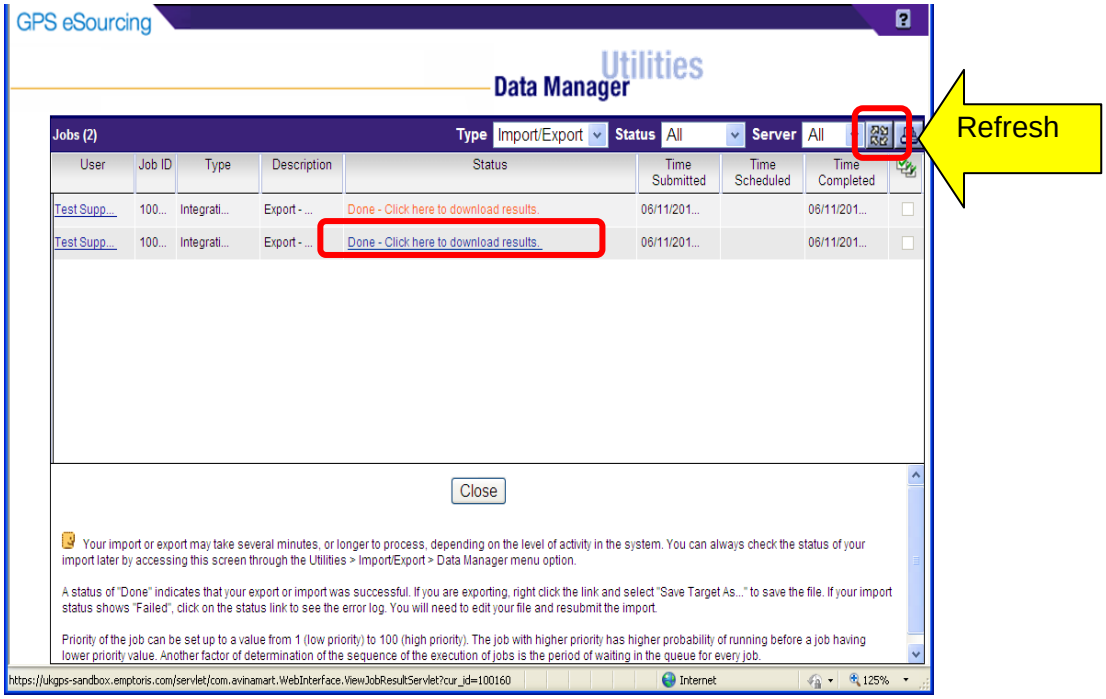
Then click on 'download offline bidding template' and OK



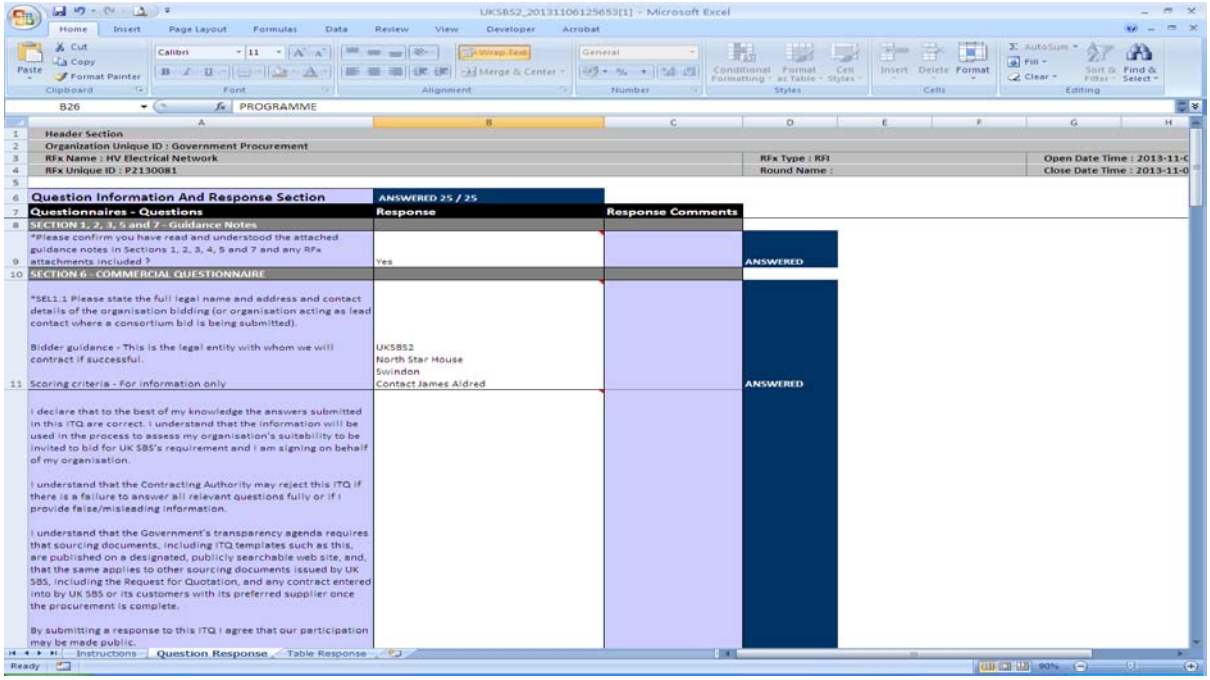
And export in your required format:



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.



Bidders should now be able to open a document which provides their text and table based responses as below:



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

UK Shared Business Services Ltd. makes no guarantees that the functionality available in these screen shots will be fully replicated in the live Emptoris e sourcing suite, nor if using an alternative web browser to IE8.

Any Bidder using these training materials should do so at their own risk and UK Shared Business Services Ltd does not make any commitment to their accuracy.

In using these training materials the Bidder commits that UK Shared Business Services Ltd shall be in no way liable should the Bidder be unable to complete any or all of their Bid or Response submission.

TEMPLATE VERSION CONTROL

Version	Date	Author(s)	Comment
1.0	05/12/2013	James Aldred	Final Version