

## **BIDDER TRAINING**

## **UK SHARED BUSINESS SERVICES EMPTORIS TRAINING MODULE**

## 1. SCOPE OF TRAINING

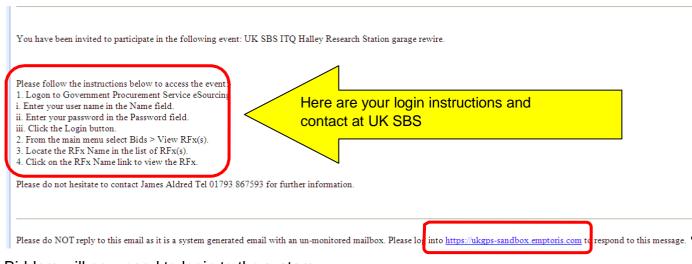
The scope of this training module will include

- 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:



Bidders will now need to login to the system.





## Register Here



#### 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

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 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 Invitation to Submit Final Offer (ITSFO), Invitation to Submit Final Offer (ITSFO), a Request for Proposal (RFP), a Request for Quotation (RFQ); an electronic Auction of 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 term 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 System. The Supplier acknowledges that I 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
- 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.
- 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
- 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

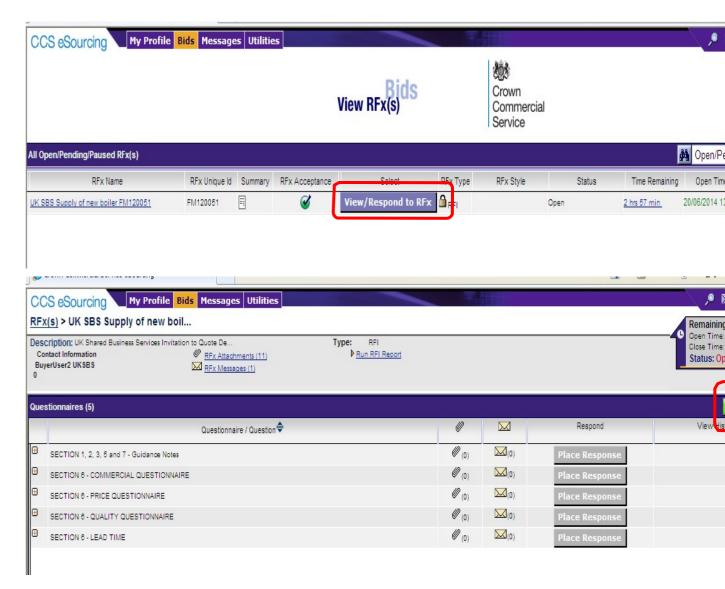
- To be granted access to the System, the Supplier must register each person which the Supplier wishes to be a Supplier User by providing the required registration data and specifying a user ID and User ID and password are strictly personal to the Supplier User and non-transferable. The Supplier shall ensure that its Supplier Users do not divulge or disclose their user ID or password to third
- 3.2. 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.
- 3.3. 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 leaves its employment or no longer requires access to the System. The Buyer retains the right to deactivate a Supplier User leaves its employment or no longer requires access to the System. The Buyer retains the right to deactivate a Supplier User leaves its employment or no longer requires access to the System. The Buyer retains the right to deactivate a Supplier User leaves its employment or no longer requires access to the System. password if there has been no access for a period of sixty (60) days.

#### 4. Supplier's Obligations



## 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.

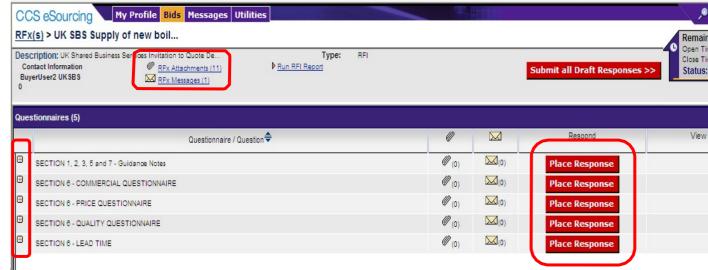


Bidders will now face a page similar to this. Locations of key areas to consider are attached.

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.

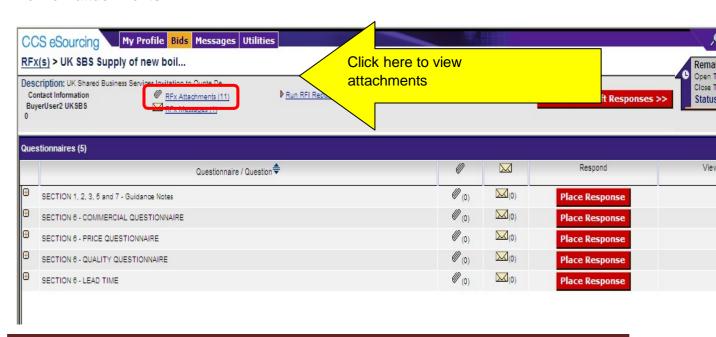


It is <u>STRONGLT</u> recommended that prior to commencing with completion of the questionnaire responses Bidders review all of the RFx attachment so they have a clear understanding of the requirement, evaluation model, price schedule, contract terms, and any associated attachments to questions.

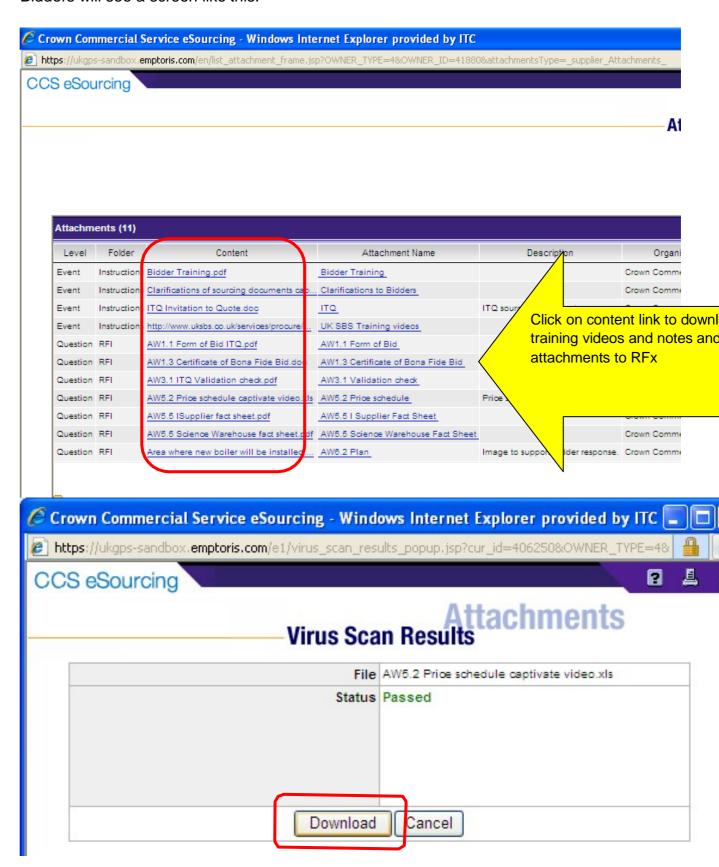
Generally attachments to questions will have a naming convention at the start of the attachment name (e.g. AW5.2 Price Schedule) to help Bidders associate the attachment with the relevant clarification.

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:

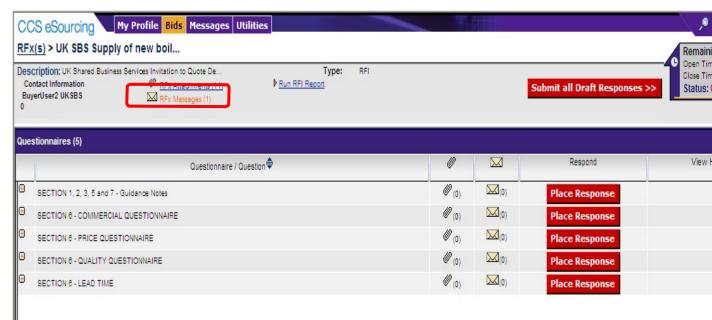


Bidders will see a screen like this:



## 5. REVIEWING RFx MESSAGES

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



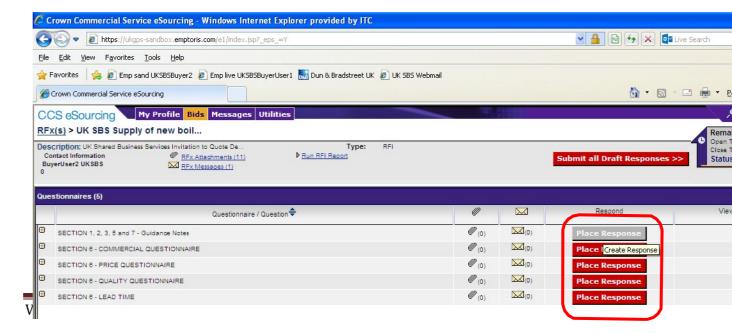
All standard system related messages are in the 'Broadcast messages' folder.

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

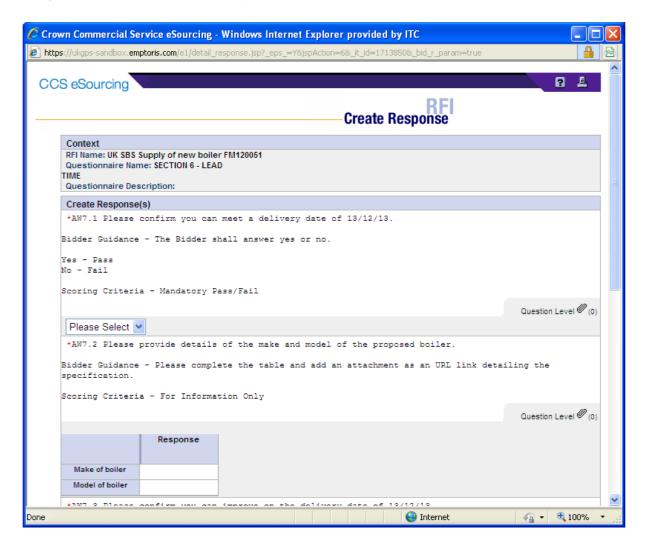
Later in the training we will advise how to contact the UK SBS Category Manager for your procurement if you need to raise any clarifications or have any questions.

## 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:



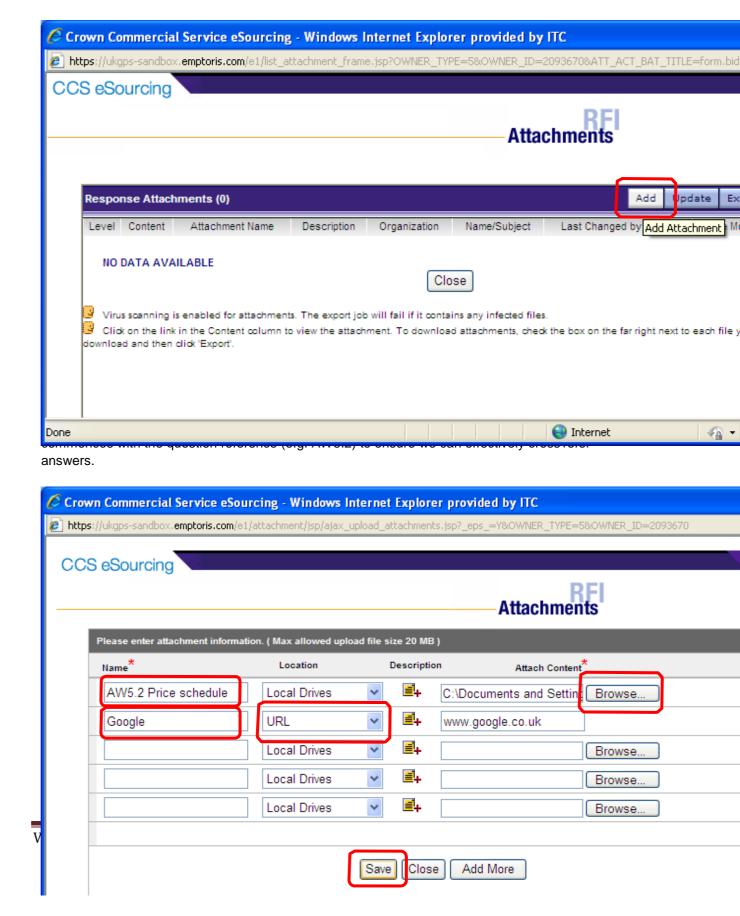
## Typically the questions will detail:

- 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 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.

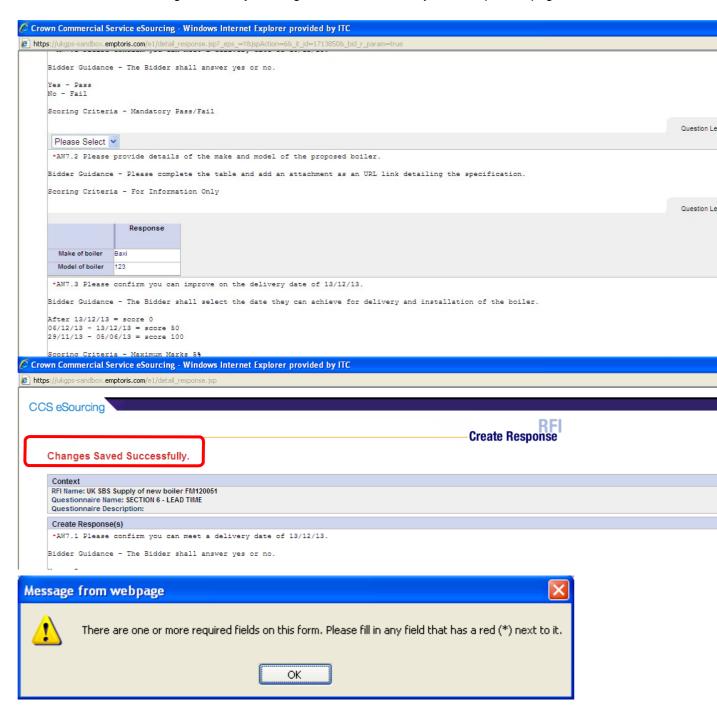
Where an attachment is permissible click on the question level icon and you will see a pop up screen like this. Click on 'add' to add an attachment and then go to the bottom of the page and 'save'. After saving the question level icon will show the number of attachments uploaded against the specific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



When you have completed a questionnaire and added all the relevant attachments you <u>MUST</u> 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.

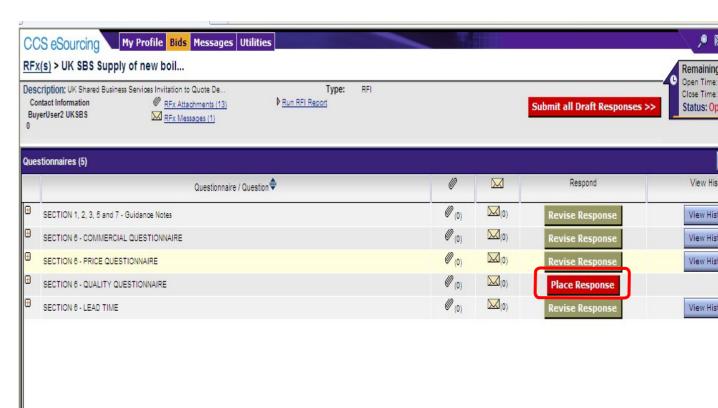
You will then see a message which says 'changes saved successfully' at the top of the page.



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

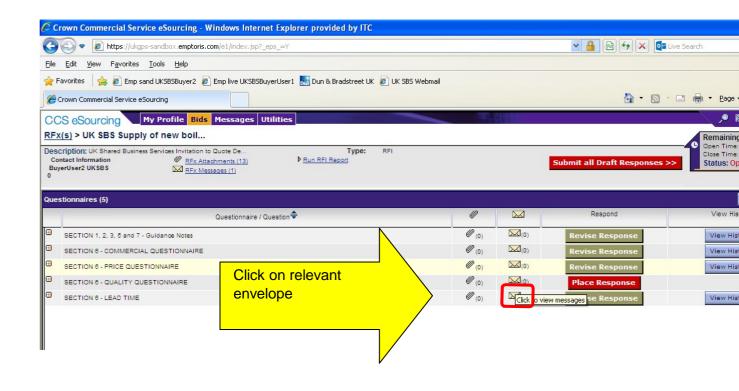
When complete save and close the questionnaire.

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.



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.



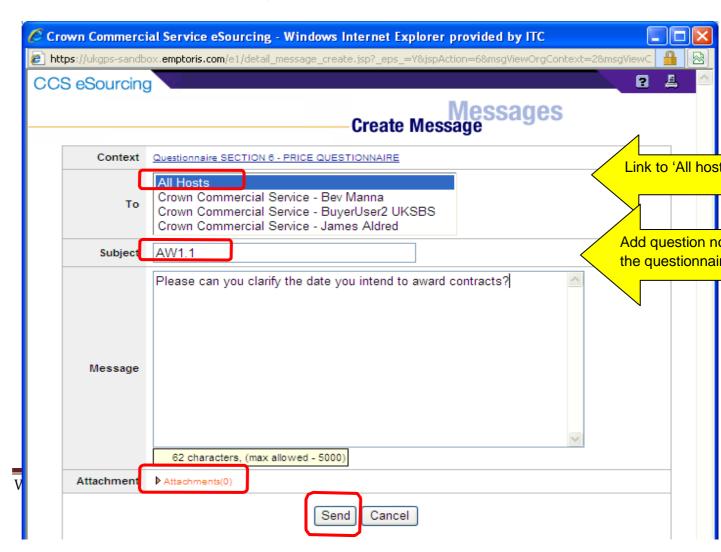
You will always see a screen like this with messages in (questionnaire messages), your messages (sent messages) and system messages (broadcast message).



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

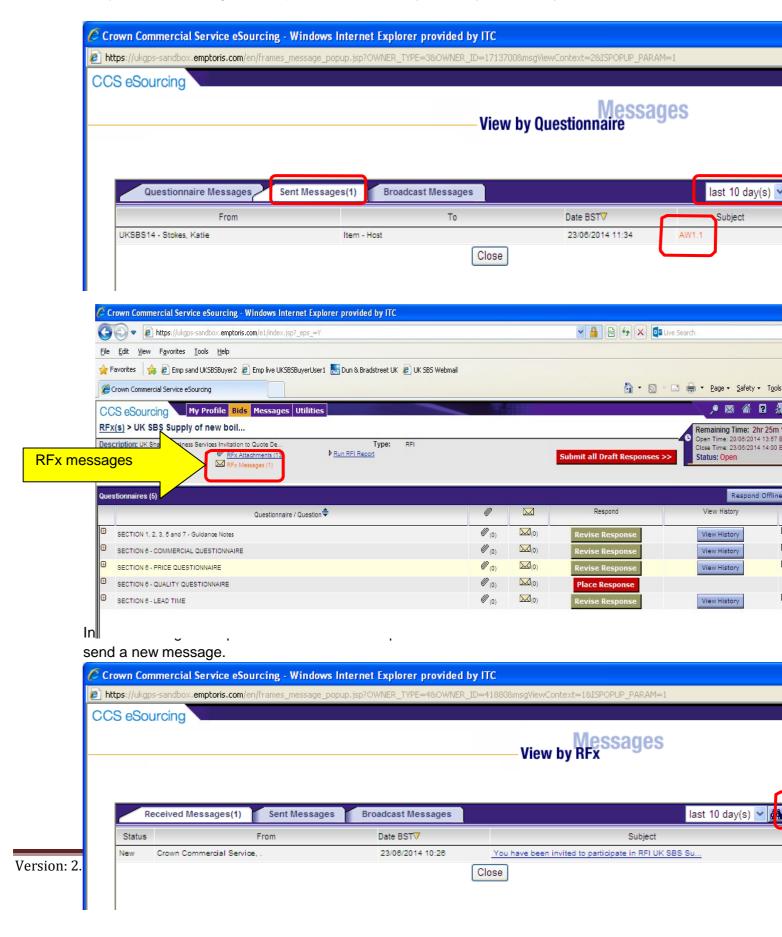
## Always send to 'All hosts'.

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



Bidders can view the question in the sent messages.

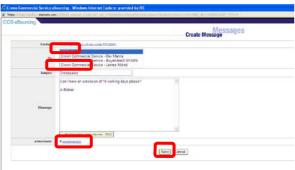
They can also filter against all questions, last 30 days, 10 days or last day



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.

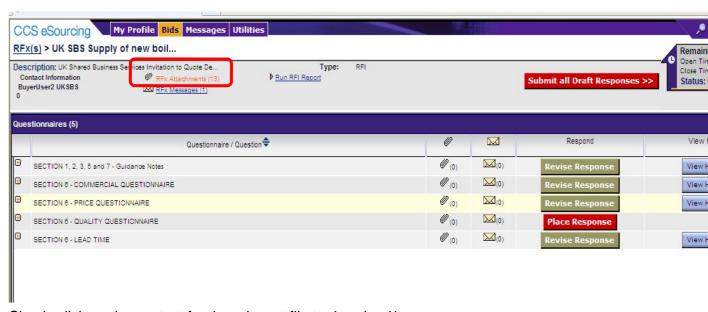
The filtering of messages against 1, 10, 30 days or all is still available in this view.



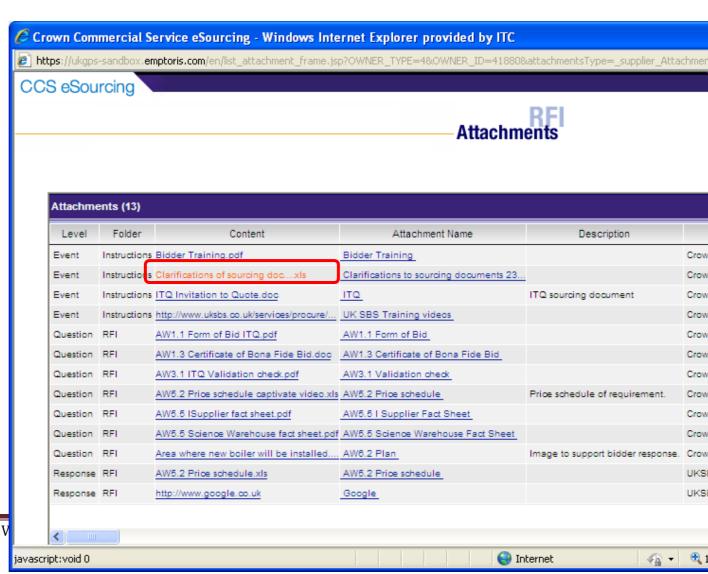
Regularly check the RFX attachments folder for clarifications to the procurement.

There maybe associated messages also in RFx messages to review.

Note it is the Bidders responsibility to check for clarifications.



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

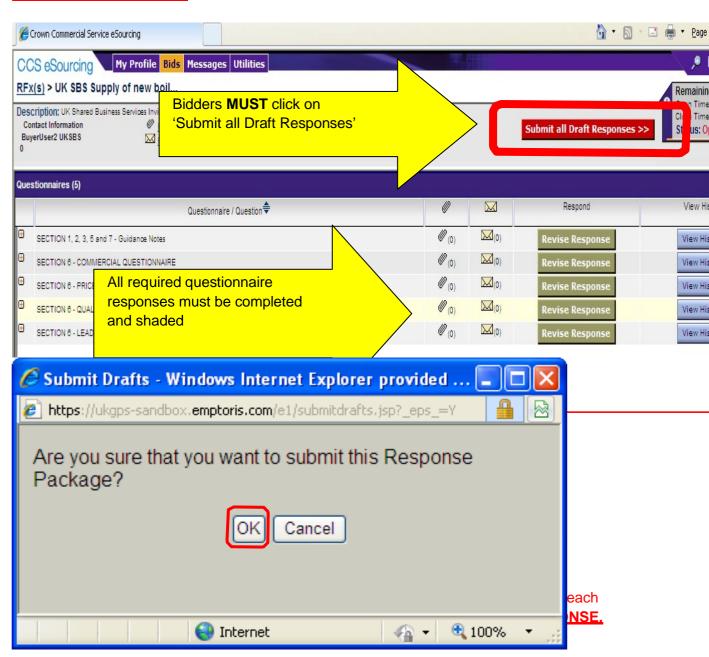




#### **SUBMITTING YOUR BID** 9.

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.



Remaining

Time:

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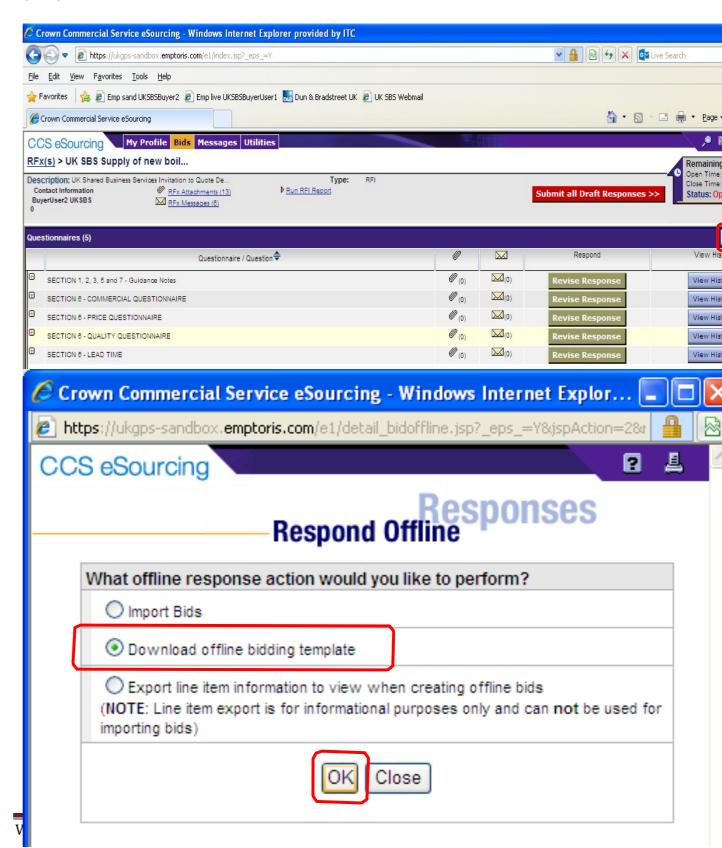
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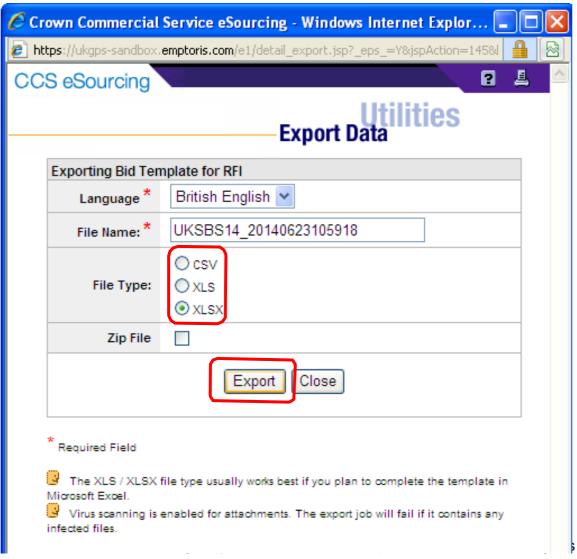
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## 10. DOWNLOADING YOUR RESPONSE

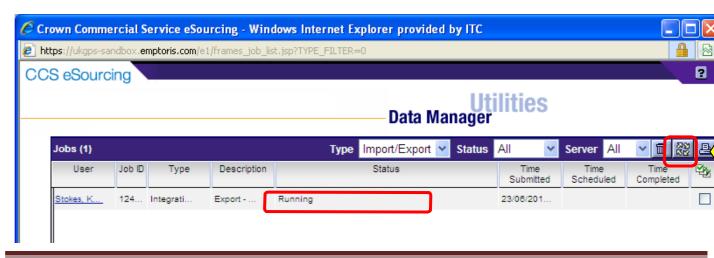
You can download your text responses to the questionnaire by simply clicking on 'Respond offline':



And export in your required format:

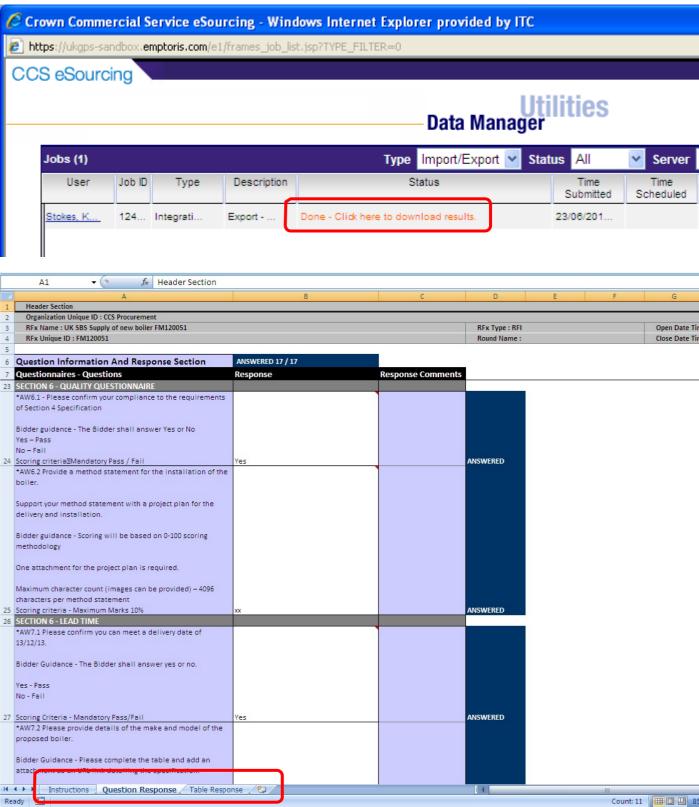


showing 'pending' or 'running' status.



Version: 2.1

Once complete you can download the report.



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.