Network Rail

E-Sourcing Supplier Quick Guide
Please read these instructions carefully before logging on to the Network Rail systems

Responding to a Network Rail RFI / RFQ

Contents

Background

Oracle 'E-Sourcing' is an electronic sourcing system which aims to deliver benefits to both buyers and suppliers by facilitating the electronic exchange of information during 'Request for Information' (RFI / PQQ) and 'Request for Quotation' (RFQ / ITT). This guide includes end-to-end activities from logging into the E-Business system, acknowledging participation, responding to the RFI/RFQ and submitting your response.

You can access Oracle E-Sourcing through any internet enabled PC running:
 o Windows Internet Explorer Version 6 and above (see instructions on page 6 for enabling Version 10);

Within Internet Explorer, ensure that in Tools > Internet Options you have pop ups and active X controls enabled.

All external access to Network Rail systems is made through the Network Rail Portal.

You will have been provided with 2 usernames (each with its own password):
One for the Network Rail Portal (this will be 5-8 characters e.g.:dblack2).
One for the E-Business Suite – E-Sourcing (this will be your e-mail address).

Logging into the Network Rail Portal

To access the Network Rail Supplier Portal click on: http://my.networkrail.co.uk

Enter your Portal username and password. Please note that the password **is case sensitive.**
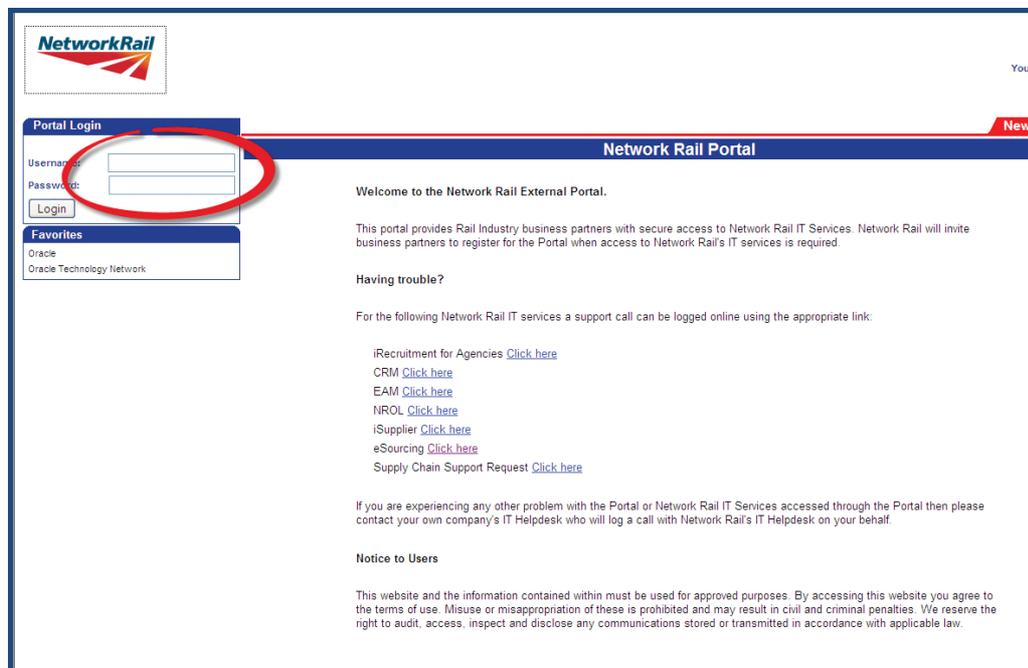
Forgotten or need a new password? Need a new person registered or someone has left? Are you seeing error messages? Please click onto the link next to
'E-Sourcing' under 'Having Trouble?' on the Portal Homepage for any of the above, to complete and submit the form.

You can also access this support form directly from the link available here:
http://www.networkrail.co.uk/aspx/5131.aspx

Here is a link to the Portal:
http://my.networkrail.co.uk/portal/page/portal/NR_PORTAL/NR_PORTAL_HOME_PAGE

1. When you log on to the **Portal** for the first time you will be prompted to provide a security question and answer. Complete these fields and click 'Submit'

2. Select **E-Business Suite** from the left hand 'Navigation Menu'. You will then be taken to the E-Business Suite login page.

    NB. If you cannot see the E-Business Suite link in the 'Navigation Menu' there is a problem with the set up of your account.

    Please click onto the link next to 'E-Sourcing' under 'Having Trouble?' on the 'Portal Homepage' to log a call for us to rectify the error.*

    The system message 'Authentification failed' is not a system error; this indicates that an incorrect password has been used.
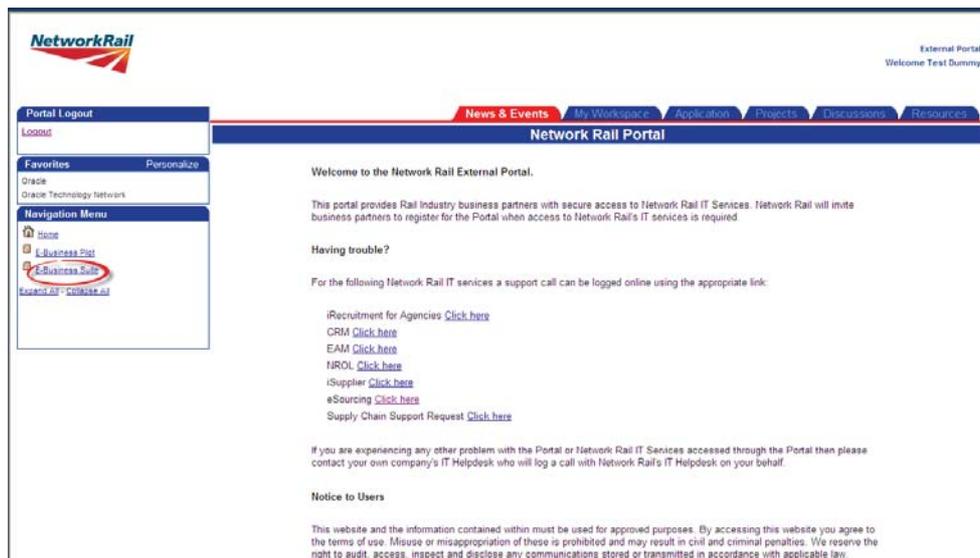
    * If you see the link 'Undefined' after entering your E-Sourcing Username and Password, go to page 8. There should be no need to log a call in this case.

3. Enter your **E-Business Suite** username and password. These **ARE** case sensitive. Your username will always be your email address. **Hint**: Copy and paste your login details from the invitation email.

4. When you log in to the **E-Business Suite** for the first time you will be prompted to change your password. Passwords must be at least 8 characters and must include at least one number. It has to be completely different to any other password you have used within the E-Business Suite and it cannot contain repeating characters e.g. 'ee' or '77'. Please be aware that you only get one attempt to change your password before being locked out

E-Sourcing password reset (E Business Suite)

If you lock yourself out (at the E-Sourcing stage **only**) you may request a password reset from the link underneath the 'Login' button:

:
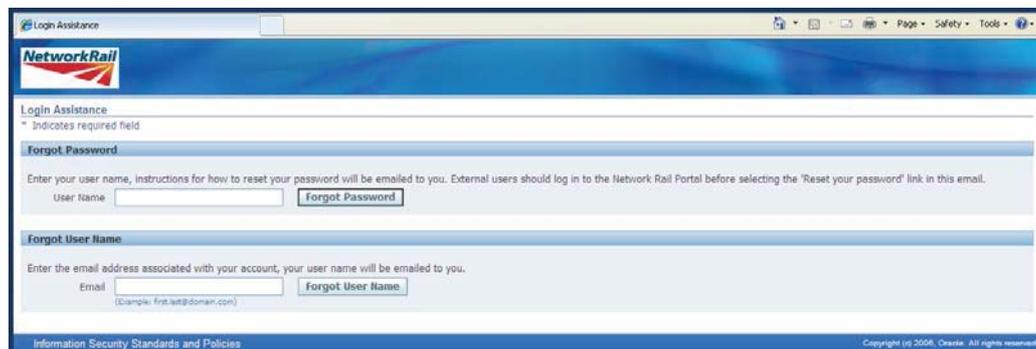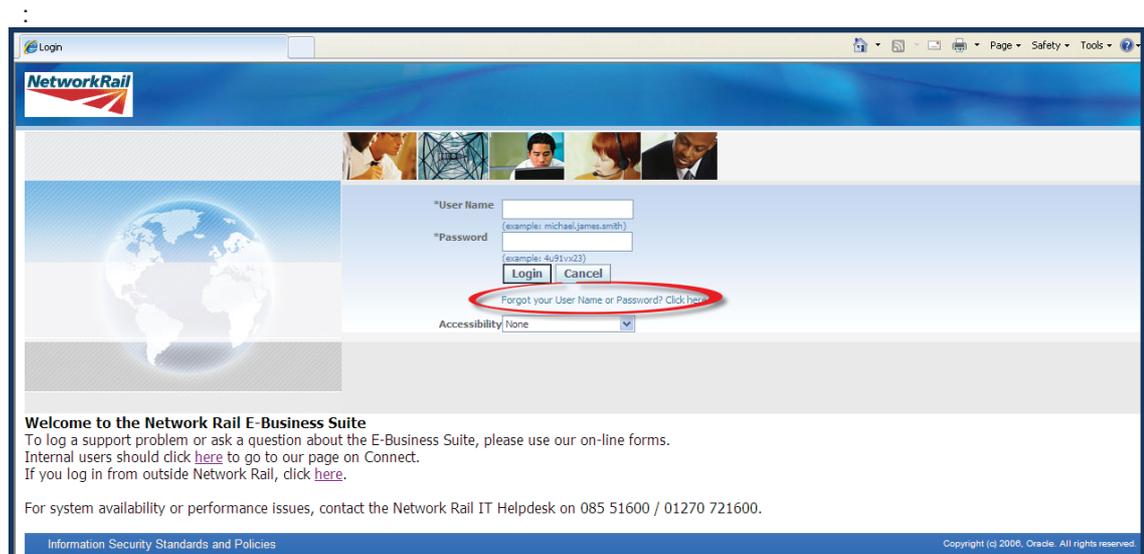
Browser issues: Logging into the eBusiness Suite

If you enter your log in details and the page freezes it is probably because the web browser being used is not Microsoft Internet Explorer version 6 or above. Browsers such as Firefox, AOL and Google Chrome are not compatible with our systems.

If you are using Microsoft Internet Explorer version 10, click on the browser compatibility icon in the top bar on the screenshot below to enable it. You will only be required to do this once; it will open correctly the next time you log in.

If you are able to enter your log in details but then see an 'undefined' link under the 'Main Menu' bar you may also click onto the browser incompatibility icon next to the padlock at the far right of the browser bar to enable the screens to show properly. You will only need to do this the first time that you log in.
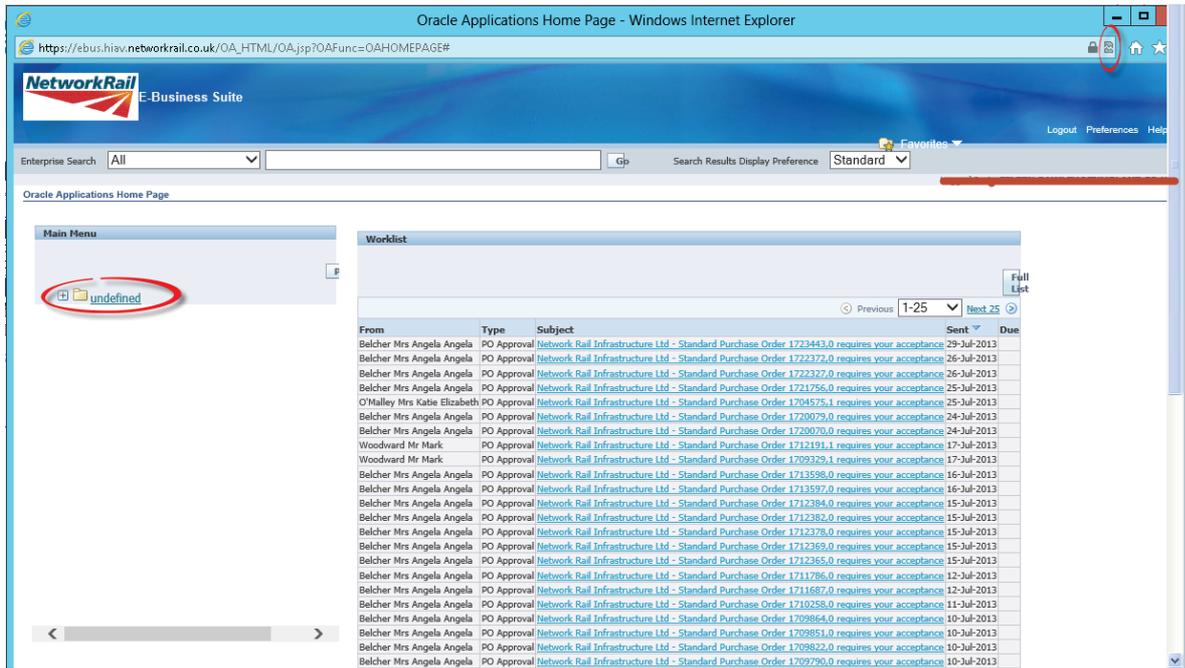
Accessing the RFI / RFQ

1. Select the 'Sourcing Supplier' and then the 'Sourcing' and 'Sourcing home Page' links underneath the 'Main Menu' bar.
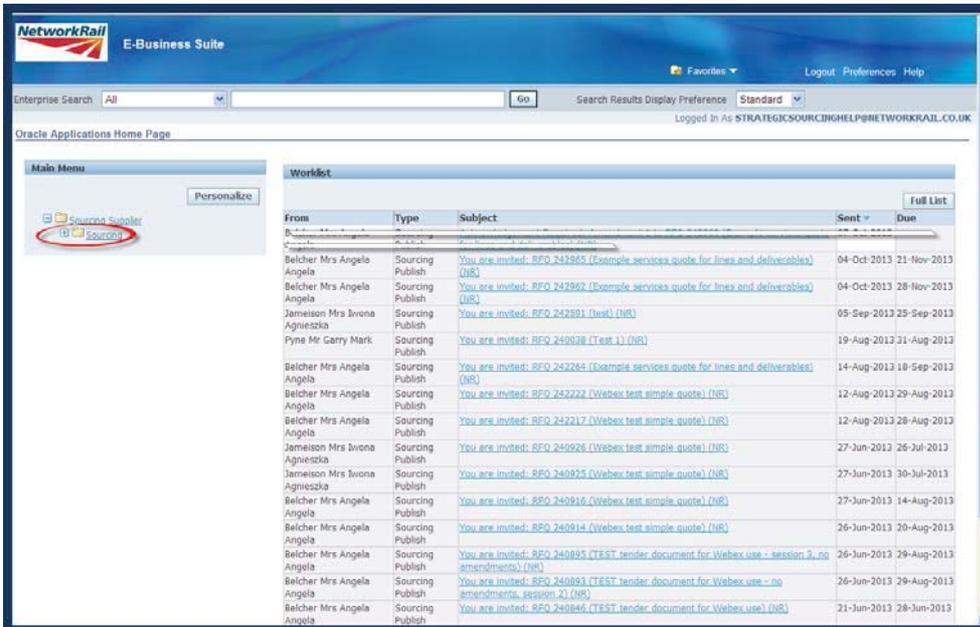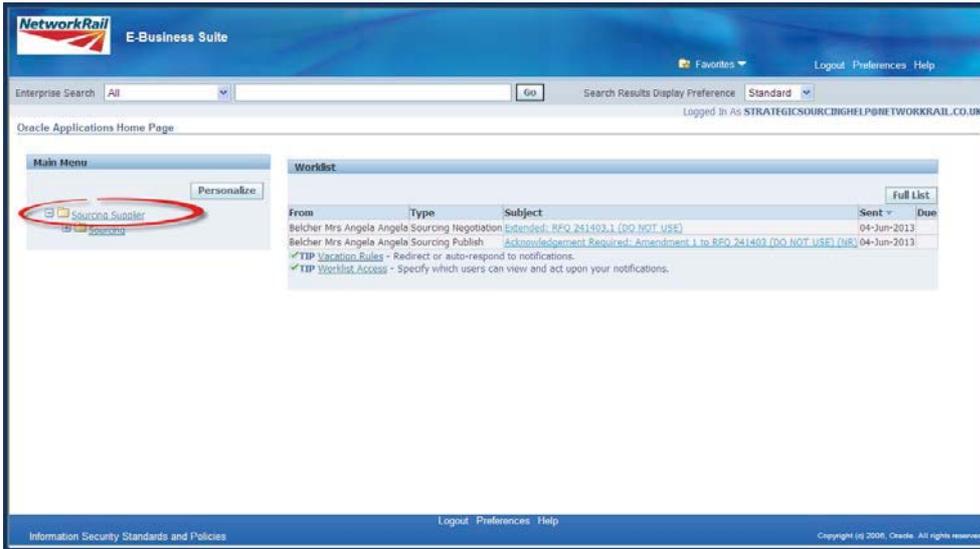
2. Click on the 'Sourcing Home Page' link.

> **NB** Avoid clicking on the 'Worklist' link just below this link since this will not give you access to view tenders.

Network Rail

3. Half way down the page you will see "Your Company's Open Invitations".

- Click on the 'Negotiation Number' to open the RFI/RFQ.

- You can now view the RFI/RFQ before you need to 'Acknowledge/Decline Participation'.

- 'Your Active and Draft Responses' – once you have responded to an RFQ or RFI your most recent draft and active responses will appear here.

- 'Full list' – click here to view the full, expanded list of tenders and/or tender responses.

The screenshot below shows an example of an expanded 'Full List' for 'Active and Draft Responses':

Worklist notifications

Click on the notification (highlighted below) to view the subject details. Notifications are notices to advise you of any new messages for you to view and/or action. In this example a tender has just been published and you are invited to participate. You may see these for tender extensions, cancellations, amendments etc.

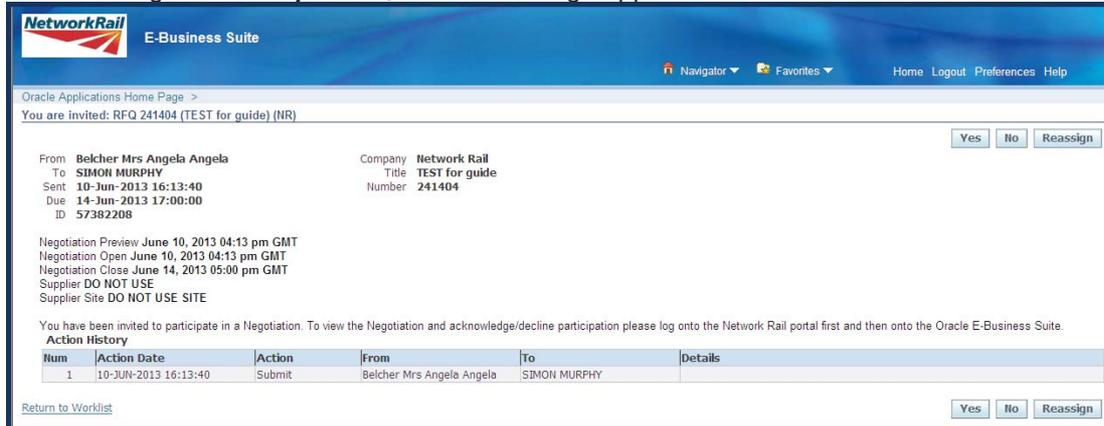**NB** If you are the main contact invited by the Buyer you will receive e mails when these messages are published as well.

When clicking on the subject link, the full message appears:

Accessing the Sections

You can view each section of the RFI/RFQ by clicking onto the header tabs. The RFI/RFQ is split into 4 sections:

1. Header contains the overall description of the event, open-close dates, high level commercial terms, 'Requirements' (questions), and 'Notes & Attachments' (the buyer's tender documentation will be located in this section).

NB The warning message below will only appear if the negotiation selected has one amendment or more.
i.e. RFQ 241403,1 as opposed to the original RFQ 241403. (Amendments will be covered in more detail later in the guide).

Any requirements identified by the buyer (if there are any) will be shown in the 'Details Section'.

The first two 'lines' in 'Notes and Attachments' explain how to obtain system and navigational support for the 'E-Sourcing' tool; any further lines (as circled below) will be extra notes from the buyer specific to this tender event.

TIP for new users: it is a good idea to download and save any documents to complete them offline, work on them and upload them all at once when creating your quote.

2. Lines are normally used in an RFQ and will contain the pricing template (for individual items or lots). Click on the 'Lines' tab to view one or several lines:
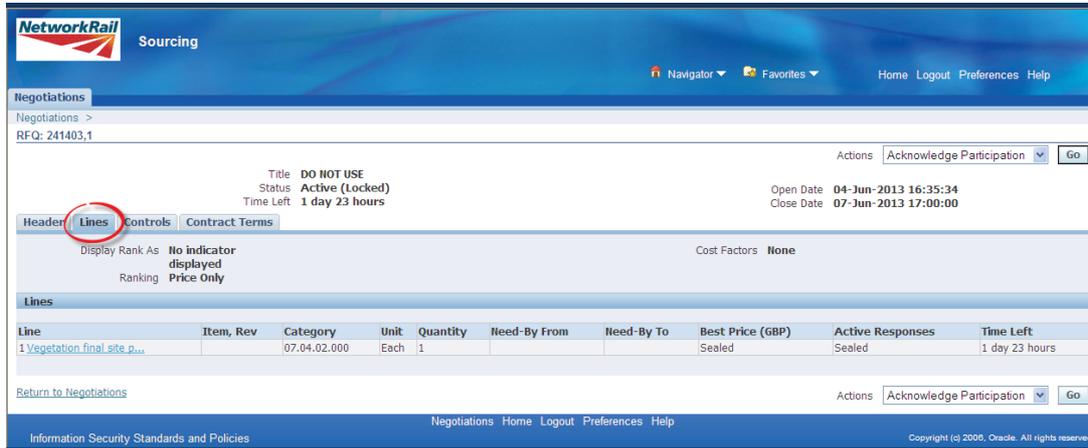
NB. Not all RFQs will have 'Lines' attached but you will need to enter a value against each 'Line' at the quote stage if they do appear. They will be shown in more detail later in the guide.

3. Controls contains the response rules and event timings. Click on the 'Controls' tab to view all of the important dates in the 'Schedule' section and the Buyer's pre set 'Response Rules'.

NB Not all of the date fields in the 'Schedule' area have to be completed by the buyer but all are shown in this example:

4. Contract Terms contains Network Rail terms and conditions and 'Deliverables'. This is where suppliers attach all of their supporting documentation.

Select the 'Contract Terms' tab. Click on the text under the 'Deliverable Name' heading in the 'Deliverables' section to see any attached files for your completion from the buyer:

After clicking onto the 'Deliverable Name' link, one or multiple deliverables will now appear for selection and view. Click on 'Return to RFQ....' and reselect the 'Contract Terms' tab to view these after you have viewed the deliverables:

Click on 'Preview Contract terms':
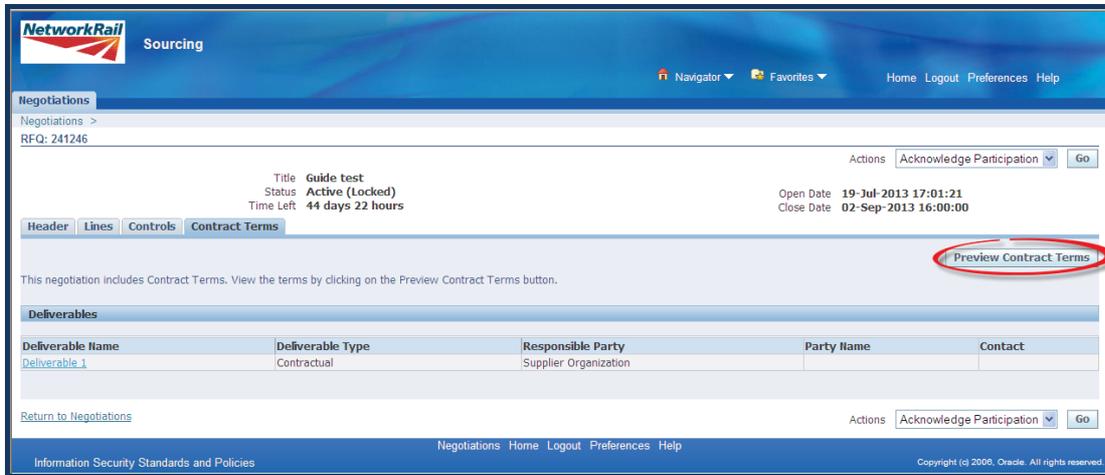
Open or save the 'Contract Terms':
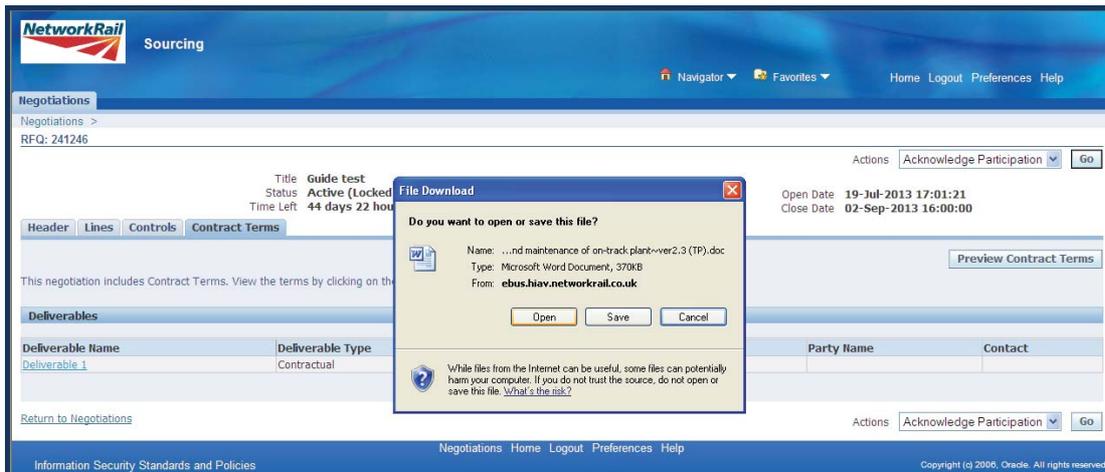
Here we are saving the contract terms:
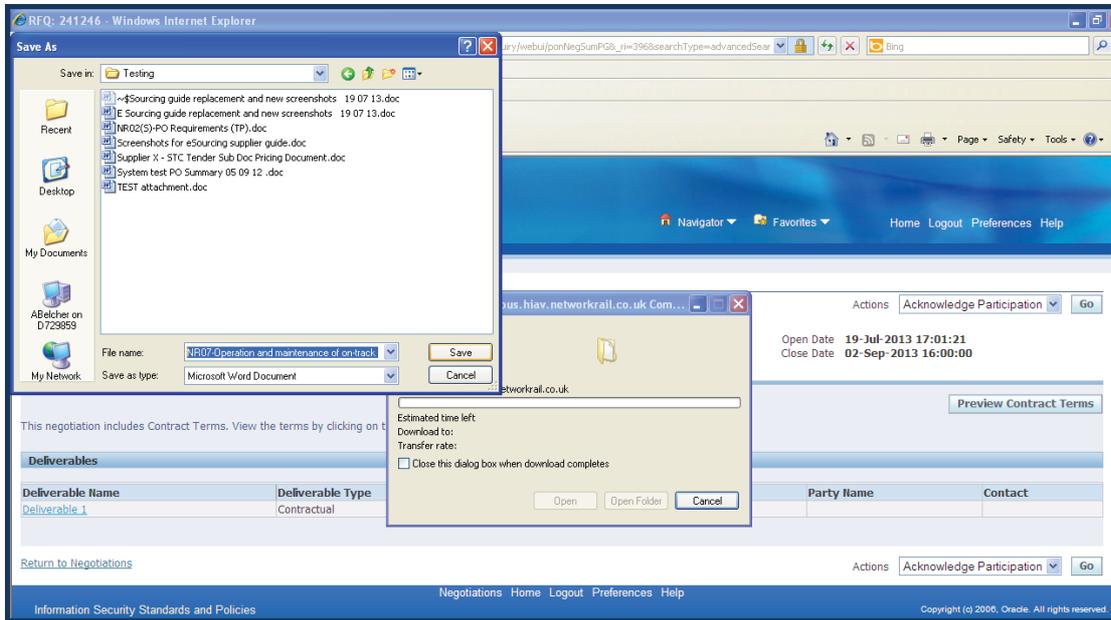
Acknowledge / Decline Participation

The buyer **may** ask you to confirm whether you intend to respond to their tender event; this action is not obligatory unless the buyer has specified that it is.

NB This action **must** be taken before creating a response (quote) since this option will be disabled as soon as you attempt to create a quote.

1. To 'Acknowledge / Decline' participation in the RFI/RFQ, click on the 'Go' button next to the 'Actions' drop down box showing 'Acknowledge Participation':
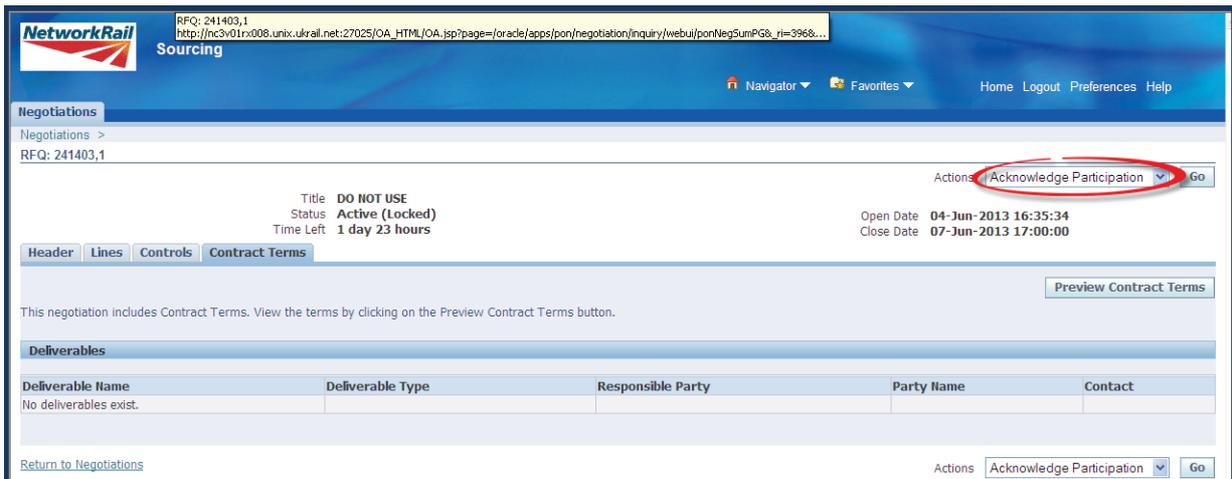
2. Select 'Yes' or 'No', enter a note to the buyer (the note is not obligatory unless the buyer has specified that it is) and click 'Apply' to submit your response:
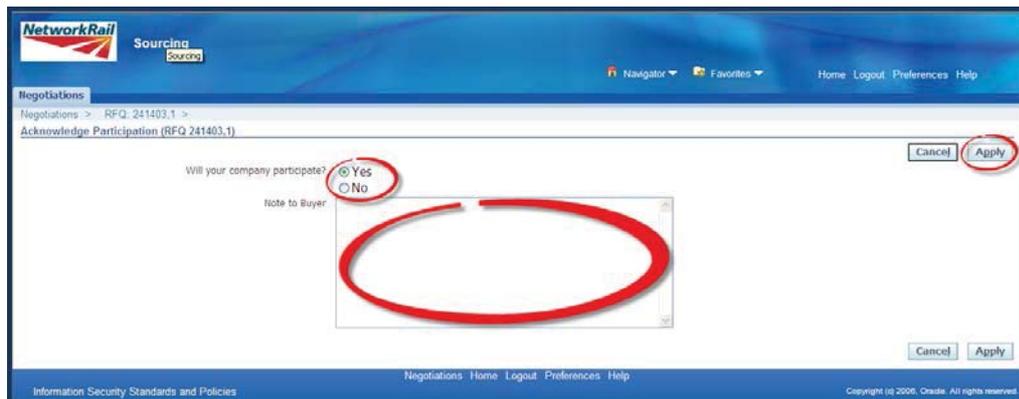
Responding to the RFI / RFQ

NB Check that you have acknowledged participation before attempting to create a response or quote since you will not be able to return to 'Acknowledge Participation' if you have already started a response or quote (see page 20).

Respond to the RFI/RFQ by clicking on 'Create Quote' (for an RFQ) or 'Create Response' (for an RFI) from the 'Actions' drop down list as shown below:

From within the 'Create Quote' mode you can view all of the RFI/RFQ details on one page:

1. To view **Requirements** (questions) click on 'Expand All':

Network Rail

STC Tender Sub Doc Pricing Document.doc		File	Tender Submission Documents - Pricing Document			11-Jun-2013	✎ 🗑
Attachment File Name ic Compliance Statements Cont Arr.doc		File	Compliance Statements - Contract Arrangements			11-Jun-2013	✎ 🗑
STC Tender Sub Doc Tenderers Assumptions.doc		File	Tender Submission Documents - Tenderer's Assumptions			11-Jun-2013	✎ 🗑
STC Tender Sub Doc Compliance Statements Cont Req.doc		File	Compliance Statements - Contract Requirements			11-Jun-2013	✎ 🗑
STC Tender Sub Doc Form of Tender.doc		File	Tender Submission Documents - Form of Tender			11-Jun-2013	✎ 🗑

Requirements

Expand All | Collapse All

Focus Title	Target Value	Quote Value
⊞ Requirements		

Contract Terms

Preview Contract Terms

In the **Requirements** section, enter your responses to questions in the 'Quote Value' fields:

Requirements

Expand All | Collapse All

Focus Title	Target Value	Quote Value
⊟ Requirements		
⊟ test		
Where are your head offices located?		
List any subcontractors that you will be using and why		
What was your organisation's turnover in the last year of trading?		

TIP:

Click on 'Save Draft' regularly to save your work. (The buyer will not be able to see any 'Draft' or 'Submitted' responses during a 'Sealed' event.

2. **Deliverables***

NB If the RFI/RFQ contains 'Deliverables' in the 'Contracts' area, attach documents to the 'Deliverables' and **not** to the top of the 'Header' in the 'Attachments' section.

If **no** contract deliverables are shown you **may** attach the required files to the 'Header' 'Attachments' section.

Click onto the 'Contracts' tab and scroll down to the '**Deliverables**' section. Click onto the 'Update' pencil icon for each one to enable you to update your 'Deliverables' by uploading your own completed versions:

*What is a deliverable? Documents required as part of the RFI/RFQ. The 'Deliverables' section is usually where you submit all of your tender documents. It is located within the 'Contract Terms' section so that you may differentiate between files for review only (in Header) and files for your completion (Deliverables). For simple tenders all documents may be stored on the 'Header' page.

Once you have clicked on 'Update' you will see this screen:

Click on 'Browse' to select your completed deliverable:

Set the status of your 'Deliverable' to 'Submitted' once the document has been uploaded:

NOTE: Setting a 'Deliverable' to 'Submitted' does not mean that your response has been sent; save the 'Deliverable' and click 'Done' to submit your RFI/RFQ response.

3. Click onto the **Lines** tab to enter your online pricing.

Click across to the 'Lines' tab as highlighted (the system defaults to the 'Header' tab):

NB – Not all tenders will require you to create line values. If there is no description link under the 'Line' column this will be the case and you may move straight to step 4.

Fill in the 'Quote Price' Field and click onto 'Save Draft'. The 'Promised Date', 'Start price' and 'Target Price' fields are not mandatory:

WARNING - If there are completed lines here you **must** complete them even if this information is included in the attachments; the system will error if you do not and you will not be able to submit your tender. Please enter the quote price accordingly.

4. Submit your response by clicking on the 'Continue' button.

Click on 'Continue'; the system will check and highlight any process errors before finally submitting your quote:

You may now edit your response by clicking on the 'Back' button or 'Submit' to send to the buyer.

Final checks:

Step 1 – Review all of your answers in the 'Requirements' area to ensure they are correct.
Step 2 – Go 'Back' to creating your quote if you have any changes to make.
Step 3 – Click on 'Save Draft' if you want to store your work for completion at a later time.

NB Once you have submitted your quote you cannot usually make any changes to it but you may continue to do so when it is in a 'Draft' state. Occasionally, if the buyer has allowed for multiple supplier quotes to be submitted until the event closing date/time, you may re-submit your quote. (You may check this from the 'Controls' tab).

When you are ready to send your final quote:

Click on '**Submit**' to send your response.

> **NOTE:** Once you have submitted your response a confirmation screen will appear. Make a note of the Quote number for future reference.

Acknowledging Amendments

Any change made to the RFI/RFQ by the buyer once it has been published is known as an 'Amendment'. In order to respond/resubmit a response you must accept the amendments to show that you have viewed the changes.

Click onto the RFI/RFQ number and select '**View Amendment History**':

Click onto the spectacles icon under 'Review Changes' or click onto 'Acknowledge Amendment':

Confirm that you have read the amendments by ticking the terms and conditions Acceptance box and select 'Acknowledge':
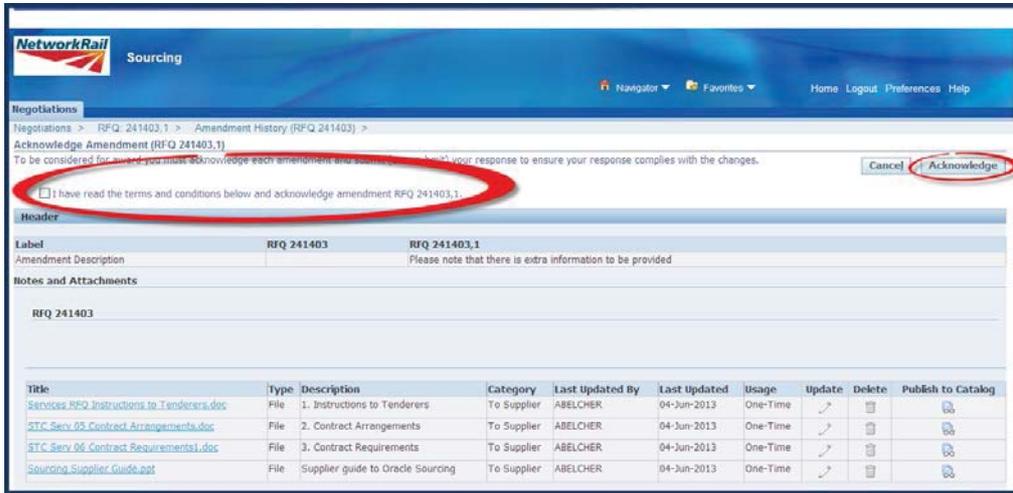
Continue to create a response or return to the 'Negotiations Page'. Say 'Yes' if you are ready to load your tender (create a response) or 'No' if you wish to do it later:
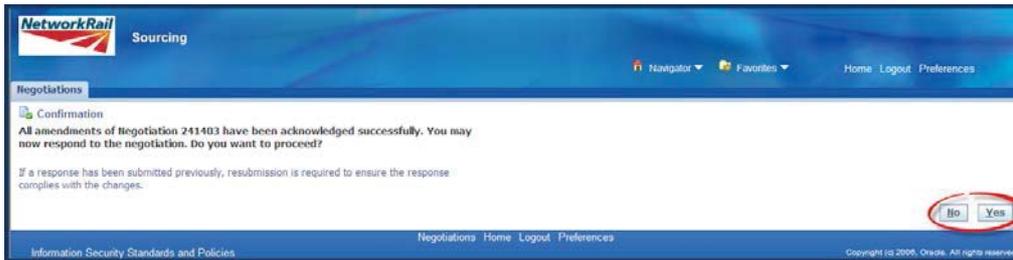
Communicating with the buyer

Communications with the buyer should be made through the 'Online Discussions' tool accessible from the 'Actions' drop down list as shown below:
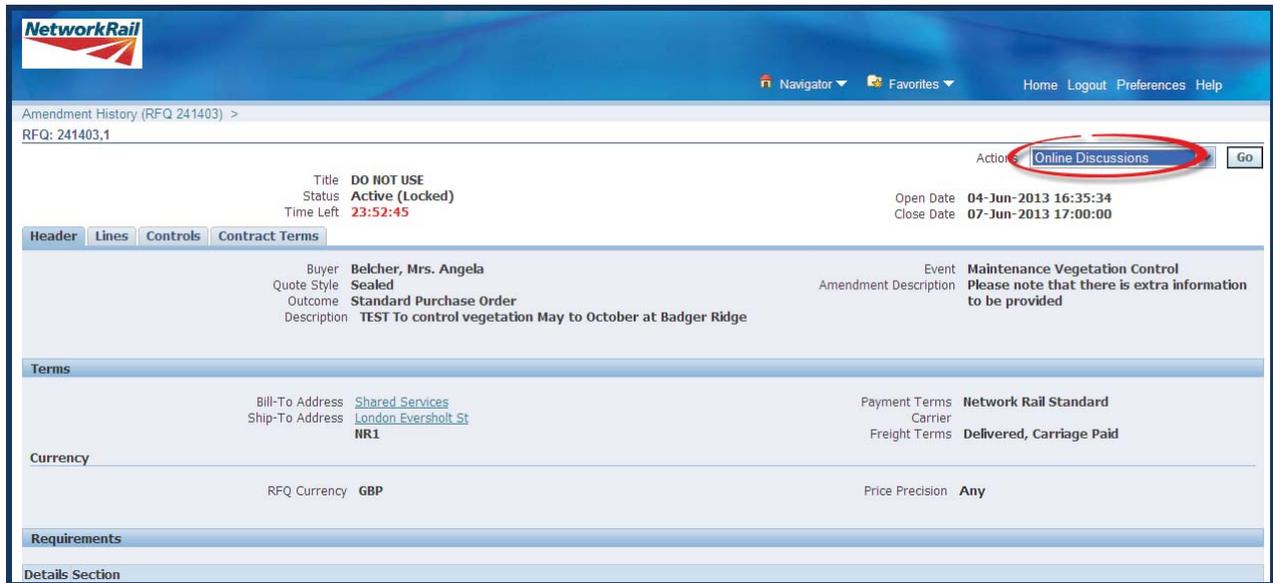
Click onto 'New Message' to create a new message to the buyer **or** the 'Reply' button to answer a previously posed question:
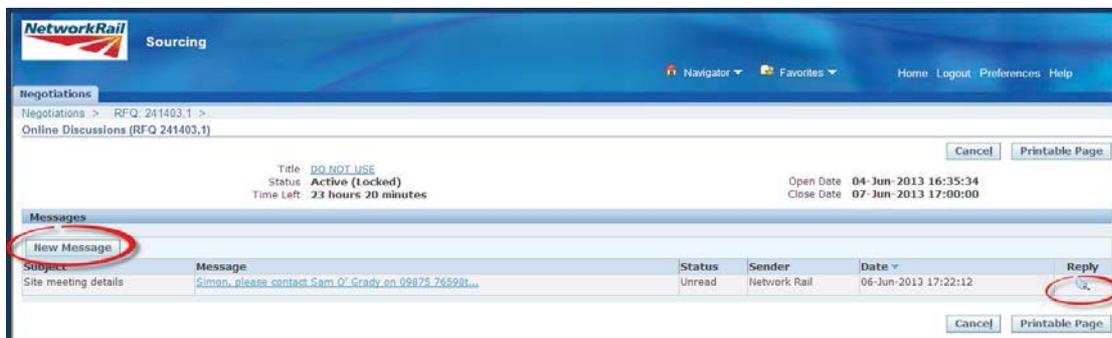
Type in a subject/message and click on 'Send':
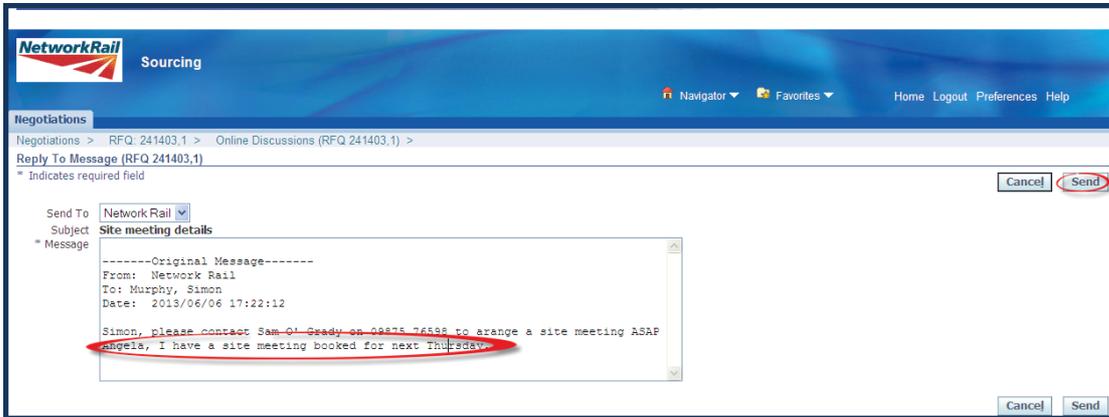
Viewing previous messages:
NB All messages and responses will always remain attached to the version of the tender where they were originally published; they do not carry forward to the latest tender version.

If you require to view messages from an earlier amendment you may do so by clicking onto 'View Amendment History' in the 'Actions' drop down box, selecting 'Go' and clicking on the version you require to view:
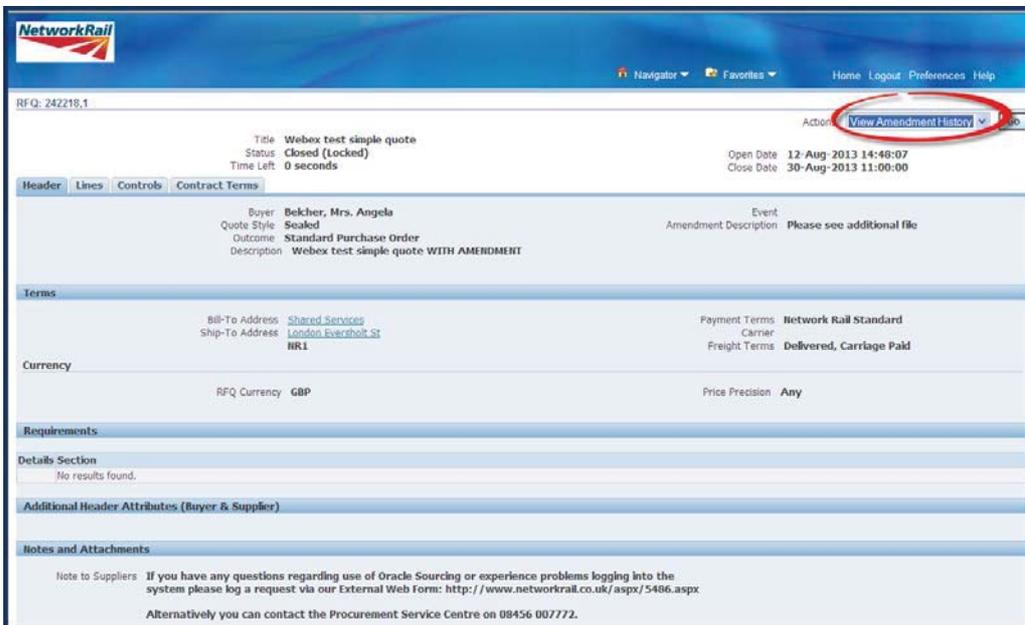
Here, we are selecting the original RFQ:

Now the 'Online Discussion' area is selectable from the 'Actions' drop down field against the original tender version so just select 'Go' to see the messages:

Useful Hints and Tips

What is a	A 'Requirement' is a question. *NB 'Questions' were previously known as 'Attributes' in the*

requirement?	*previous version of this tool.* A 'Requirement' in 'Oracle E-Sourcing' is the mechanism used by the Buyer to gain information from a supplier. 'Requirements' are a list of questions that the supplier will respond to during an RFI/RFQ. These are not always present.
What is a deliverable?	Documents required as part of the RFI/RFQ. The 'Deliverables' section is usually where you submit all of your tender documents. It is located within the Contract Terms section. For simple tenders all documents may be stored on the 'Header' page.
How often should I save my work?	Keep saving your response as you go – 'Oracle' times out after 30 minutes of inactivity and you may lose your work. Activity counts as clicking on buttons such as 'apply' or 'save as draft' or navigating between screens. Typing into a field does not count as activity.
Will I receive email notifications?	Yes. Users who have been chosen as the main point of contact by the buyer **only** will be notified by e mail when an RFI / RFQ has been published; when there is an amendment or a new round; when the RFI/RFQ has been extended; when a new message is sent/received and when a quote has been submitted.
What do I do if I have forgotten my password?	Portal and Oracle – 3 incorrect logins before the system locks a user out (when you log in for the first time you only have **one attempt**). **Portal** - In this event, log the problem on the External Support Form **E-Sourcing** - Click on the note underneath the 'Login' button on the E-Business Suite Login page or log an External Support Form
How do I know when my response has been submitted?	After you have clicked 'submit' and 'confirm' a screen showing a response number will appear. If in doubt, contact your Network Rail Buyer who can confirm if it has been received.
I have missed the deadline, what can I do?	Do not leave your submission until the last minute; once the deadline has passed you will not be able to submit a response. If you need an extension contact your Network Rail Buyer prior to the deadline.
How do I reassign an RFQ?	Published tenders may not be reassigned to another supplier contact. You may however ask another registered user to respond; they will have the same access but will not receive any system e mail notifications.
Can I send a paper response?	No. All responses must be sent through Oracle E-Sourcing.
What is the maximum file size?	There is no maximum file size but as a general rule, keeping attachments to 10 MB or less will enable easier uploading.
How do I complete a document template?	Download the document and save to your computer. Complete offline and re-upload into the system using the 'Update' button.
Will I get feedback on my submission?	In order to gain feedback you will need to request it from the Buyer no more than **10** days post award.
The buyer has made an amendment; do I need to re-submit my bid?	Yes. You will need to log onto the system, accept the amendment changes and re-submit your bid.
What s a 'new round'?	From time to time a buyer may wish to retender previously tendered works or services. In this case they will publish a new round which will be denoted by the suffix **'-1'**. i.e. original tender RFQ 234786, new round RFQ 234786-1.

Web Based Icon Summary

Icon	Function
🗑	**Delete** – Deletes the item.
✏	**Update** – Opens an item for updates.
▶	**Expand List** – Shows that there are further details present within a list and opens these for viewing.
📅	**Select Date / Time** – Opens the Calendar function to allow dates and times to be entered into the relevant fields.
🔦	**Search** – Opens the search function for a field to search the available list of values.
⊟	**Quick-Select** – Selects and adds a value from the Search results to a field, removing the need to select and apply it.

Contacts

Helpdesk (Monday – Friday, 9am until 5pm)

- Please request password resets and additional users via this link to our External Support Form
- For any navigational help and other assistance please contact the NSC System Team on 01908 784 490 or NSC System Web Form

  NB The NSC System Team cannot answer procurement questions.

Procurement Queries

- Please direct any procurement and/or commercial enquiries to your Network Rail Procurement Buyer via 'Online Discussions'.

Housekeeping

Please advise us of any personnel changes as soon as possible using the External Support Form. This helps us to keep you properly notified of all tender opportunities since if the buyer is able to select someone who has moved on in your company, you may not see the e mail notifications.

We may from time to time contact you to check your registered users.