

## eSourcing Suite - Supplier Guidance

## Part A – Supplier Registration

Version 1.4 (01/06/2015)

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## **1. Introduction**

- 1.1. This document provides guidance to suppliers about Crown Commercial Service's eSourcing Suite. It specifically addresses how to register for the eSourcing Suite and to set-up supplier and user online profiles. Guidance on how to tender via the eSourcing Suite is provided in a separate Part B document.
- 1.2. The eSourcing Suite is an online system providing a wide range of eSourcing functionality for Crown Commercial Service, our customers and our suppliers. The eSourcing Suite supports end-to-end procurement activity including: early-market engagement, issuing Invitations to Tender, online evaluation, eAuctions, and post-award contract and supplier management. Access to the eSourcing Suite is available to registered organisations via the internet at <a href="https://gpsesourcing.cabinetoffice.gov.uk">https://gpsesourcing.cabinetoffice.gov.uk</a>.
- 1.3. Please note that this guidance is for *suppliers* or *potential suppliers* to government. If you wish to register a public sector organisation as a *customer* of Crown Commercial Service and use the eSourcing Suite, please contact our Service Desk on 0345 410 2222.
- 1.4. The eSourcing Suite has been implemented as part of Crown Commercial Service's wider eEnablement Programme. This encompasses the introduction of the Government eMarketplace (GeM), the Dynamic Marketplace, new Spend Analysis functionality, and the forthcoming Procurement Portal.

## 2. Technical Requirements

- 2.1. The eSourcing Suite is accessed over the internet and should operate using any standard web-browser. To use the eSourcing Suite successfully, pop-up blockers on your web-browser will need to be disabled for this site (https://gpsesourcing.cabinetoffice.gov.uk). You may also wish to set the eSourcing Suite as a 'Trusted Site' on your browser.
- 2.2. Emails sent to a supplier from the eSourcing Suite will come from the address eSourcing@gps.cabinetoffice.gov.uk. Please ensure that you have any email filters enabled, that will allow you to receive emails from this particular address.

## 3. My organisation is an existing CCS supplier. How does it register for the eSourcing Suite?

- 3.1. Most suppliers with existing contracts (including framework agreements) with Crown Commercial Service have been <u>pre-registered</u> on the new eSourcing Suite (and so do not need to register themselves).
- 3.2. For pre-registered suppliers, much though not all of the information pertaining to that supplier (held in their online profile) will have been pre-populated in the new system. Pre-registered suppliers are asked to:
  - a) verify that the pre-loaded information is correct and;
  - b) complete their online profile by providing supplementary information.
- 3.3. The individuals who are the Supplier Admin Managers (SAMs) for all pre-registered suppliers will receive emails detailing their user-names and passwords. See Section 7 of this guidance for further information on SAMs.
- 3.4. Section 8 of this guidance describes how to log-on the eSourcing Suite. Section 9 contains information on a supplier's online profile and how to edit it. SAMs should review the pre-loaded information in their organisation's online profile. Where information is absent or incorrect, this should be updated (though note that not all fields can be edited directly by a supplier).
- 3.5. Please pay particular attention to the Unique ID that has been allocated to your organisation. The eSourcing Suite uses <u>DUNS Numbers</u> as supplier Unique IDs. A DUNS Number is a unique nine-digit number provided to organisations (free of charge) by Dun & Bradstreet. The DUNS Number will be used to populate a variety of fields in your organisation's eSourcing Suite online profile, such as the details of parent companies. This additional information will be updated automatically to the eSourcing Suite via a data-feed from D&B (though not immediately).
- 3.6. It is <u>very important</u> that all suppliers are registered with the correct DUNS Number, corresponding to <u>registered legal address</u> of that supplier (which will not necessarily be the address that you personally work from). If you do not know your organisation's DUNS Number (or are not certain of the number corresponding to your organisation's registered legal address), please see the instructions under Section 5 of this guidance.
- 3.7. The Unique ID is one of the profile fields that a supplier is unable to edit for themselves. If you believe that the DUNS Number that has been pre-registered for your organisation is incorrect, please email <u>eEnablement@crowncommercial.gov.uk</u> and provide details.

- 3.8. As part of completing their organisation's online profile, SAMs should indicate whether their organisation is an SME (Small or Medium Sized Enterprise) or a Large Enterprise. Information on how to complete this field is provided under section 6 of this guidance.
- 3.9. Pre-registered suppliers should consider whether they wish to set-up 'Suggested Category Links' for their organisation as detailed in section 10 of this guidance.
- 3.10. Crown Commercial Service has set-up one initial SAM for each existing supplier. This initial SAM can add additional users either as further SAMs or as Supplier Agents. Please refer to section 11 of this guidance.
- 3.11. Finally, SAMs should check that the information held in their personal user profile is correct (and amend it if it is not). Please see section 12 of this guidance for further information.

# 4. My organisation is *not* an existing CCS supplier. How does it register for the eSourcing Suite?

4.1. Suppliers need to be registered on the eSourcing Suite before they can participate in any online procurement activity. To begin registration, go to the eSourcing Suite front-page at <a href="https://gpsesourcing.cabinetoffice.gov.uk">https://gpsesourcing.cabinetoffice.gov.uk</a>

Crown Commercial Service	
Register Here	Useful Links
Name :" [	Register for CCS eSourcing Procurement Guidance Help & Support Related External Links
	Crown Commercial Service Portal Contracts Finder Tenders Electronic Daily (TED) SIMAP Cabinet Office
	SIMAP Cabinet Office

- 4.2. Click on 'Register for CCS eSourcing' under the Useful Links. The 'Register Organisation' window will open. Enter your organisation's details as required.
- 4.3. In the Company Name box please enter the <u>full, correct and legal name</u> for your organisation. This is important because, if you are later awarded a contract by Crown Commercial Service, it is this name that your organisation will be contracting under.
- 4.4. In the Unique ID field you need to enter your organisation's <u>DUNS Number</u>. This is a unique nine-digit number provided to organisations (free of charge) by Dun & Bradstreet.
- 4.5. The DUNS Number will be used to populate a variety of fields in your organisation's eSourcing Suite Supplier Profile, such as the details of Parent Companies. This additional information will be updated automatically to the eSourcing Suite via a data-feed from D&B (though not immediately as you register). The DUNS number that you enter will be your organisation's Unique ID in the eSourcing Suite, and it is

essential that you enter the correct number. For the eSourcing Suite Registration you will want to enter the DUNS Number for the <u>registered legal address</u> of your organisation (which will not necessarily be the office that you personally work from).

- 4.6. If you do not know your organisation's DUNS Number (or are not certain of the number corresponding to your organisation's registered legal address), please see the instructions under section 5 of this guidance.
- 4.7. A supplier only registers once on the eSourcing Suite though one supplier can have multiple individual users each able to log on to the system. If you try to register a supplier that has already been registered (based on the DUNS Number), you will receive an error message. Do NOT enter a different DUNS Number as your unique ID. Instead, please contact your organisation's SAM (Supplier Admin Manager), who is already registered, so that you can be registered as a new User for your organisation (see section 11 below). Alternatively, if you do not know the identity of your SAM, please contact Crown Commercial Service at eEnablement@crowncommercial.gov.uk
- 4.8. For registration, one of the required information fields relates to your organisation's size and specifically whether it is an SME (Small and Medium-Sized Enterprise) or a Large supplier. The definition of an SME is based on EU Criteria; and further information can be found under section 6 of this guidance. Please review this carefully.
- 4.9. Beneath the Organisation information fields, there are User information fields. The first user to register for their organisation will be automatically allocated the role of Supplier Application Manager (SAM). A SAM is a 'super-user', able to create and amend the profiles of other users within their organisation.
- 4.10. In the Login Name field, users should enter their email address. This will ensure that all users have unique Login Names; and will make it easier for users to remember.
- 4.11. Keep the 'Enable External Email Notification' radio-button set to the default 'Yes'.

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- 4.12. Click 'Save' to finish. If you have missed any mandatory fields, or entered information in an incorrect format, you will not be allowed to complete the process. Once completed, you should shortly receive an email to acknowledge that your registration is underway.
- 4.13. Crown Commercial Service will review your registration data, and validate the DUNS Number that you have provided. If all is in order, Crown Commercial Service will activate your organisation and your SAM user. You will then receive a second email containing your log-on details and password.

### 5. How do I get my organisation's DUNS Number?

- 5.1. Organisations need a valid <u>DUNS Number</u> before they can register on Crown Commercial Service's eSourcing Suite. DUNS Numbers are allocated (free of charge) by Dun and Bradstreet (D&B).
- 5.2. Most organisations will already have an allocated DUNS number, even if they do not know it. Please note that a DUNS Number is proprietary to and controlled by D&B. Use of DUNS numbers for the eSourcing Suite has been negotiated by Crown Commercial Service. However organisations cannot use a DUNS number for other commercial purposes without entering into a separate commercial agreement with D&B.
- 5.3. To get your organisation's DUNS Number you can contact D&B UK directly on 0870 243 2344 (option 3). Non-UK organisations can find details of their local D&B contacts via the website <u>www.dnb.com</u>
- 5.4. However, a more immediate way to locate your organisation's DUNS number is to use the facility on the registration page for Crown Commercial Service's Dynamic Marketplace at https://buyers.procserveonline.com/otis/preregistration/details.html?marketplace=ge

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- 5.5. Enter your organisation's name and address and your contact details into the Dynamic Marketplace registration fields. Then click the 'Find D-U-N-S Number button.
- 5.6. The next page will identify a list of candidate organisations and their DUNS Numbers. DUNS Numbers can be allocated by D&B at the 'branch' level of an organisation, so you could see more than one DUNS Number for your organisation. For the eSourcing Suite Registration you will want to use the DUNS Number for the registered legal address of your organisation (which will not necessarily be the office that you personally work from). Review the list and note-down the correct DUNS number (do not click on 'This is Correct' yet).

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- 5.7. It is possible that the search will not identify your correct organisation and/or no DUNS Number will be listed. If this is the case please contact D&B UK directly on 0870 243 2344 (option 3), or online at <u>http://www.dnb.co.uk/duns-form.asp</u>. Non-UK organisations can find details of their local D&B contacts via the website <u>www.dnb.com</u>
- 5.8. If you only wish to register for the eSourcing Suite then, at this stage, you do not need to click 'This is Correct'. However Crown Commercial Service recommends that suppliers also register for the Dynamic Marketplace, which offers opportunities for lower-value procurements (typically below the OJEU thresholds). To do this, click on 'This is Correct' then complete the Dynamic Marketplace registration process.

5.9. To complete your registration for the eSourcing Suite, return to the instructions in section 4 of this guidance.

# 6. How do I identify whether my organisation is an SME or a Large enterprise?

- 6.1. Government Departments (including Crown Commercial Service) need to be able to report on their contracting and spend with Small and Medium Enterprises (SMEs).
- 6.2. As part of the registration process for Crown Commercial Service's eSourcing Suite, suppliers are asked to identify whether they are an SME or a Large organisation.
- 6.3. SMEs are defined at European level (2003/361/EC) as:
  - having less than 250 employees (FTE) excluding apprentices;

#### and

 having an annual turnover of less than €50M (£40M) OR a balance sheet of less than €43M (£35M);

#### and

- being 'autonomous' not significantly controlled by, or in control of, other enterprises (see the point below)
- 6.4. An supplier is autonomous if:
  - it is totally independent of other enterprises; or
  - it holds less than 25% of the capital or voting rights in one or more other enterprises; and other enterprises do not each own more than 25% of its capital or voting rights.
- 6.5. In some cases, a supplier still qualifies as an SME by being a 'partner' or 'linked' enterprise even if it exceeds the 25% criteria. To confirm if this could apply to your company, please consult the EC's guidance (pages 20-25) at <a href="http://ec.europa.eu/enterprise/policies/sme/files/sme\_definition/sme\_user\_guide\_en.pdf">http://ec.europa.eu/enterprise/policies/sme/files/sme\_definition/sme\_user\_guide\_en.pdf</a>
- 6.6. Finally, a supplier will not be counted as an SME if 25% or more of its capital or voting rights are directly or indirectly controlled, jointly or individually, by one or more public sector bodies.
- 6.7. An enterprise which is not an SME is classified as a Large enterprise.

6.8. Within the overall definition of an SME, three different sizes of SME can be distinguished – medium, small and micro-enterprises. The criteria for distinguishing the three sizes of SME are set out in the table below. In addition, an SME must be autonomous, as described above.

	Employees (FTE)		Finances
			turnover < €50M (£40M)
SME – Medium	< 250	AND	OR
			balance sheet < €43M(£35M)
			turnover < €10M (£8M)
SME – Small	< 50	AND	OR
			balance sheet < €10M (£8M)
			turnover < €2M (£1.6M)
SME – Micro	< 10	AND	OR
			balance sheet < €2M (£1.6M)

## 7. How do I register myself as a user for the eSourcing Suite?

- 7.1. Like organisations, individual users also need to be registered before they can logon and use the eSourcing Suite. A supplier organisation can have many different users, each with their own distinct user account. There are two types of supplier users:
  - Supplier Admin Manager (SAM)
  - Supplier Agent
- 7.2. A Supplier Agent can participate in procurement events on behalf of their supplier organisation. A SAM is a 'super-user', able to participate in events, but also to create and amend the profiles of other users within their organisation. An organisation can have more than one SAM.
- 7.3. The first user to register for a supplier will be the individual who completes that supplier's online registration application (see section 0 above), or the individual who has been pre-loaded for existing CCS Suppliers (see section 0 above). This first user will be automatically allocated the role of a Supplier Admin Manager (SAM).
- 7.4. Once a SAM has been registered for an organisation, they then control the subsequent registration of additional users for that organisation (see section 11). In other words, if your organisation already has a SAM(s), you will not be able to register directly with the eSourcing Suite, and should instead contact your SAM(s) to arrange this. If you do not know the identity of your organisation's SAM(s), please contact Crown Commercial Service at <u>eEnablement@crowncommercial.gov.uk</u>
- 7.5. Once a SAM activates your user account, you should receive two emails. The first will contain your username, and the second a temporary password. This is the information you will need to log on to the eSourcing Suite.

## 8. How do I log on to the eSourcing Suite?

- 8.1. Once you have successfully been registered for the eSourcing Suite (see sections 0 and 4), you will be emailed your password.
- 8.2. Go to the eSourcing Suite front-page at <u>https://gpsesourcing.cabinetoffice.gov.uk</u>. Enter your <u>User Name</u> in the Name Box, and your password.

Crown Commercial Service	
Register Here	Useful Links
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	Crown Commercial Service Portal Contracts Finder Tenders Electronic Daily (TED) SIMAP Cabinet Office
	Freedom of Information   Privacy Policy   Legal Notice

- 8.3. If you have forgotten your User Name or your password, click on the "Forgot..." links and follow the onscreen instructions.
- 8.4. The first time that you log on, you will be prompted to change your temporary password; and to provide the answer to a password reset question. Please note that your new password must be at least eight characters long, and consist of both upper and lower case letters, and a mixture of letters, numbers and non-alphanumeric characters.
- 8.5. The first screen you will see once you have logged-on is the User Agreement, governing the access and use of the eSourcing Suite. Suppliers must accept this agreement if they wish to use the eSourcing Suite. Click on 'I Agree' to proceed.

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8.6. The next screen you will see is the 'Bids – View RFXs' page (RFx being the generic term for 'Request For....'). The 'Bids' button will be highlighted on the top menu-bar. If your organisation is currently participating in any online procurement events you will see them listed on this screen. However, the first time you log on as a new user (for a new supplier), this list is likely to be empty. The comment will say 'NO DATA AVAILABLE'.



8.7. If you are logged-on as a SAM, you will see four buttons across the top menu bar: My Profile; Bids; Messages; and Utilities. If you are logged-on as a Supplier Agent, you will not see the 'My Profile' button. The 'My Profile' button allows a user to change the *organisation*'s profile, and Supplier Agents do not have the authority to do this.

## 9. What is my organisation's online profile, and how do I complete it?

- 9.1. An organisation's online profile contains the information, describing that organisation, required by Crown Commercial Service. It is very important that an organisation's profile is kept complete and up-to-date. Only an organisation's SAM(s) can amend the organisation's profile (not a Supplier Agent).
- 9.2. Some of the information in an organisation's profile would have been completed (by the first SAM) at initial registration to the eSourcing Suite (see section 4 above) or been pre-loaded for existing CCS Suppliers. However, there are additional information fields in the profile not completed at registration.
- 9.3. If you are logged-on as a SAM you will see the 'My Profile' button at the left of the top menu-bar: click on this button and then on 'Manage My Profile'. This will open your organisation's profile. On the new left-hand side 'wizard' menu, click on the 'Main' link under 'Profile'. This will display the main information in your organisation's profile.
- 9.4. Some of the information fields in your organisation's profile can be edited: others cannot. Some of the information fields are populated by a data-feed from Dun and Bradstreet (D&B), based on the DUNS Number provided as the Unique ID. If you believe that any of the information held in these specific fields is incorrect, please raise this with D&B. You can contact D&B UK directly on 0870 243 2344 (option 3). Non-UK organisations can find details of their local D&B contacts via the website www.dnb.com .
- 9.5. Underneath the 'Main' button on the left-hand side 'wizard' menu is the 'Additional Information' link. This includes read-only information on parent companies in the organisation's family (if relevant), provided to Crown Commercial Service by D&B.

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### 10. What are 'Suggested Category Links'?

- 10.1. Crown Commercial Service categorises spend using a Cabinet Office approved category structure. There are 26 Master categories of spend, each of which includes a number of Categories, each of which in turn includes a number of sub-Categories.
- 10.2. Suggested Category Links are a means by which a supplier organisation can identify to Crown Commercial Service the categories that it is seeking to provide business in. Crown Commercial Service will use the Suggested Category Links to identify suppliers that might have an interest in a particular procurement exercise, and to alert them to the upcoming opportunity.

#### 10.3. IMPORTANT DISCLAIMER:

Crown Commercial Service's eSourcing Suite offers suppliers the opportunity to identify 'Suggested Category Links': those categories of goods and services in which they are seeking to do business. As a service to potential suppliers, Crown Commercial Service aims to invite suppliers with relevant Suggested Category Links to new procurement events. However, Crown Commercial Service does not guarantee that suppliers will be invited to each and every such event – and suppliers still retain responsibility for checking the <u>OJEU</u> (or other information sources eg <u>Contracts Finder</u>) and identifying upcoming opportunities of interest for themselves.

10.4. If you do wish to set-up Suggested Category Links for your organisation, click on 'My Profile → Manage my Profile' on the top menu-bar. Then click the 'Suggested Category Links' link on the left-hand 'Wizard' menu. Then click on the 'Link to Category' button.



10.5. A new window will open. Expand the category tree by clicking on the small square white 'plus' sign, to the immediate left of the words 'root category'. This will show the 26 Master Categories. Expanding a Master Category will show the constituent Categories; and expanding a Category will show the constituent Sub-Categories.

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- 10.6. To create Suggested Category Links, tick the relevant check-boxes on the right hand side of the screen, and then click the 'Link to Category' button again. Links can be made at the Master Category, Category, and/or Sub-Category level. In the example above, the supplier has linked to the ICT Commodities Master Category (and hence to all the constituent Categories and Sub-Categories). They have also linked to the specific Systems Management Sub-Category (within the Managed/Outsourced Services Category, in the IT Systems Master Category).
- 10.7. The current window will close, and the 'Suggested Category Links' page will now show the selected links.

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## **11.** How do I add additional users for my organisation?

- 11.1. A SAM can create additional users within their organisation. These new users can be Supplier Agents or be additional SAMs. Supplier cannot create new users.
- 11.2. To create a new user a SAM can click on the top 'My Profile' button; then on the Users link at the bottom of the left-hand 'wizard'; and then on the 'Create' button.

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11.3. A new 'Create User' window will open. Complete the details for the new user you wish to create. Click on the 'Role' drop-down box to select whether the user will be a Supplier Agent or a SAM. Use the individual's email address as their Log-in Name. Scroll down the page completing all the fields. The 'Supplier User Type' field identifies the role that the user plays in the organisation's relationship with Crown Commercial Service (e.g. Account Manager, Management Information contact, etc).

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- 11.4. Once the new User Profile information is completed, click the 'Save' then the 'Close' buttons. The new user will now be listed amongst the organisation's existing users.
- 11.5. The new user will be emailed their log-on details and a temporary password.
- 11.6. A SAM can also un-approve (suspend) another user's account. To do this: select the user (with the right-hand check-box') and then click on the 'Unapprove' button. Conversely, to approve or re-approve a user's account: select the user, and then click on the 'Approve' button.

### 12. What is my personal User Profile, and how can it be changed?

- 12.1. A user profile contains information about an individual user of the eSourcing Suite. A user's profile is first established by their SAM (see section 11). A user can then edit some of their own profile information (such as their phone number, Job Title or address).
- 12.2. A Supplier Agent can only edit their own user profile. To do this: click on the Utilities button on the top menu-bar, then on Admin, then on My Profile.
- 12.3. A SAM can edit their own user profile in the same way. A SAM can also edit the profiles of other users in the same organisation. To do this, they should click on 'My Profile → Manage My Profile' on the top-menu bar, then on Users on the left-hand 'wizard' menu. The full list of users within the organisation should be shown. Clicking on a user's Last Name opens that user's profile for editing.



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