



## Sourcing System – Non-CCS Buyer Guidance – JAGGAER

This guidance relates to the Crown Commercial Service Sourcing System at:

<https://crowncommercialservice.bravosolution.co.uk>

Date	Version	Change Summary
16/08/2019	1.0	First published version

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## Section 1. Registration on the Sourcing System

### 1.1 Introduction

A major role for Crown Commercial Service (CCS) is the creation of commercial agreements to support public sector organisations in the procurement of common goods and services.

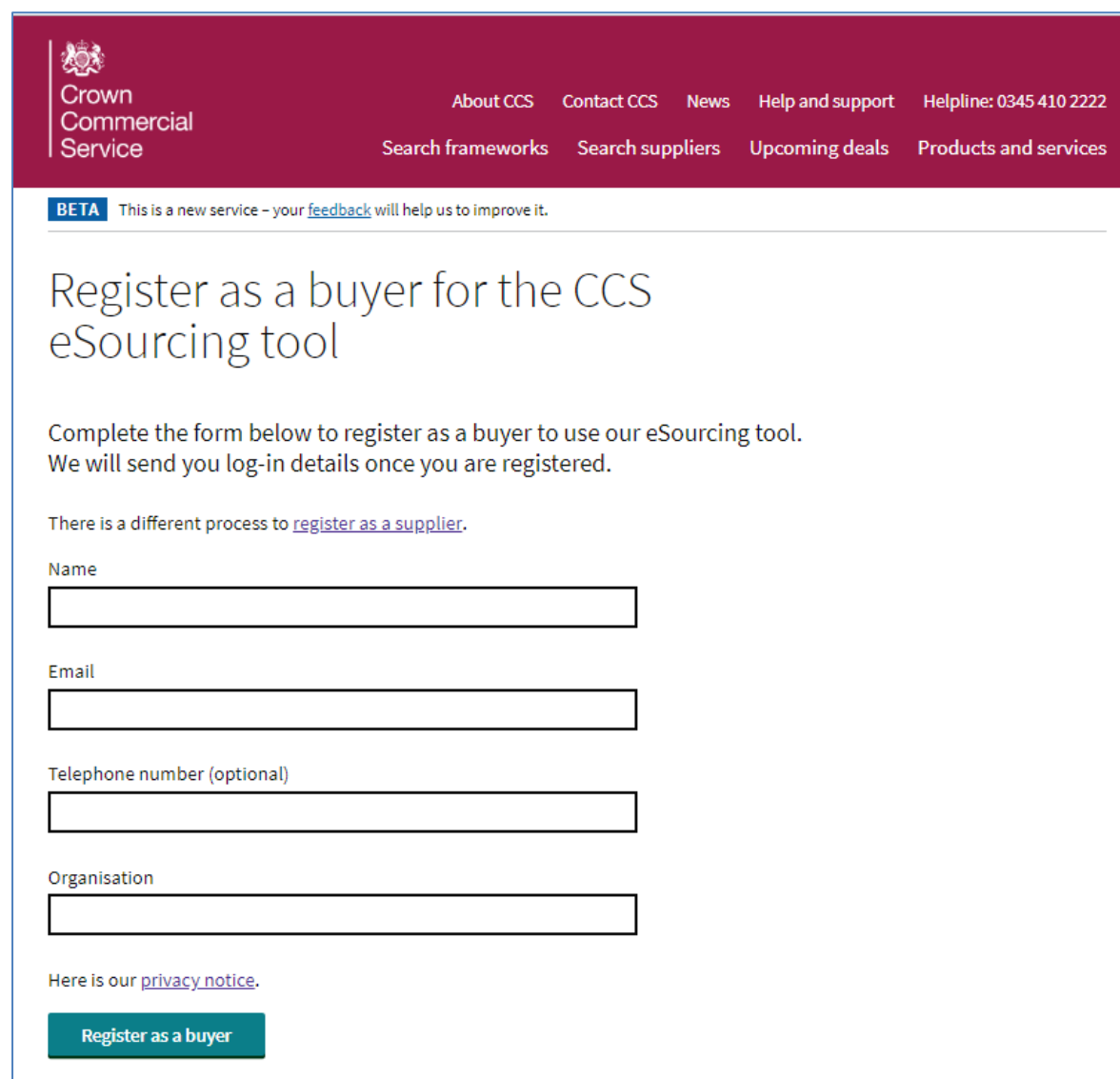
Where these commercial agreements can be used to meet a public sector requirement by running a further competition (call-off), CCS makes its eSourcing System available free of charge to those buyers. Access is not provided to public sector organisations to conduct further competitions from non-CCS commercial agreements or for their wider procurement activities.

Registration for a buyer on the Sourcing System is a one-time activity and subsequently the buyer can create, or participate in another buyers events on multiple occasions.

### 1.2 Requesting registration

You request registration on this platform by completing your details in the webform at:

<https://www.crowncommercial.gov.uk/esourcing-register>



The screenshot shows the 'Register as a buyer for the CCS eSourcing tool' webform. At the top is a maroon header with the Crown Commercial Service logo and navigation links: 'About CCS', 'Contact CCS', 'News', 'Help and support', 'Helpline: 0345 410 2222', 'Search frameworks', 'Search suppliers', 'Upcoming deals', and 'Products and services'. Below the header is a blue 'BETA' badge with the text 'This is a new service – your [feedback](#) will help us to improve it.' The main heading is 'Register as a buyer for the CCS eSourcing tool'. The instructions state: 'Complete the form below to register as a buyer to use our eSourcing tool. We will send you log-in details once you are registered.' A link for suppliers is provided: 'There is a different process to [register as a supplier](#).' The form contains four input fields: 'Name', 'Email', 'Telephone number (optional)', and 'Organisation'. Below the fields is a link to the 'privacy notice'. At the bottom is a green 'Register as a buyer' button.

The design of this Login Page will be subject to future revision and will also include links to customer guidance and registration: <https://crowncommercialservice.bravosolution.co.uk>

The screenshot shows the Crown Commercial Service Portal login page. At the top left is the Royal Coat of Arms and the text 'Crown Commercial Service'. The page is divided into three main sections: 'Opportunities', 'Login', and 'Procurement'. The 'Opportunities' section includes links to the Crown Commercial Service Portal, Cabinet Office, and current opportunities. The 'Login' section has fields for Username and Password, a list of links for account issues, and an 'Enter' button. The 'Procurement' section features a shopping cart icon and the word 'Procurement'. Below these are three black boxes: 'Useful Links' (SIMAP, TED, Contracts Finder, Gov.uk), 'Helpdesk' (Need assistance?, contact info, Call me back), and 'eSourcing Portal' (description of the facility). At the bottom left is the JAGGAER logo and 'System Requirements'.

**Crown Commercial Service**

**Opportunities**  
Crown Commercial Service Portal  
Cabinet Office  
View current opportunities and notices

**Login**  
Username   
Password   
- I cannot access my account  
- I am a new supplier user  
**Enter**

**Procurement**

**Useful Links**  
- SIMAP  
- Tenders Electronic Daily (TED)  
- Contracts Finder  
- Gov.uk

**Helpdesk**  
**Need assistance?**  
Please contact our Helpdesk  
**Phone** +44 0800 069 8630  
**Email** [help@bravosolution.co.uk](mailto:help@bravosolution.co.uk)  
[Call me back](#)

**eSourcing Portal**  
This website provides a facility to allow Supplying Organisations to take part in Tender opportunities led by Crown Commercial Service.

**JAGGAER** | System Requirements

When CCS have processed your request, you will be sent 2 emails as confirmation, these provide details of the Username and an initial password, these will be sent to the email address provided on the webform.

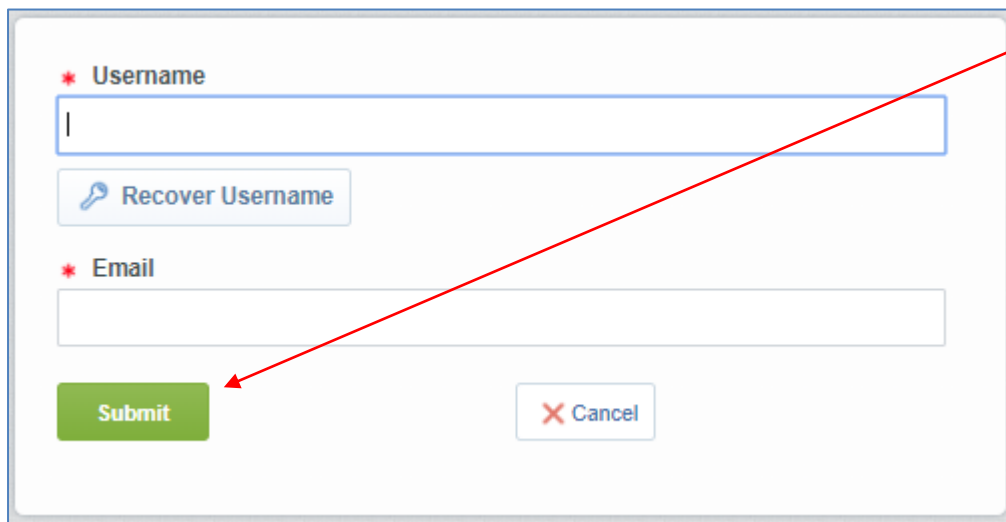
### 1.3 How to reset your Password

On the Login Page select "I cannot access my account".

A close-up of the 'Login' section from the screenshot. It shows the Username and Password fields, the account recovery links, and the 'Enter' button. A red arrow points from the text 'On the Login Page select "I cannot access my account"' to the first link, '- I cannot access my account'.

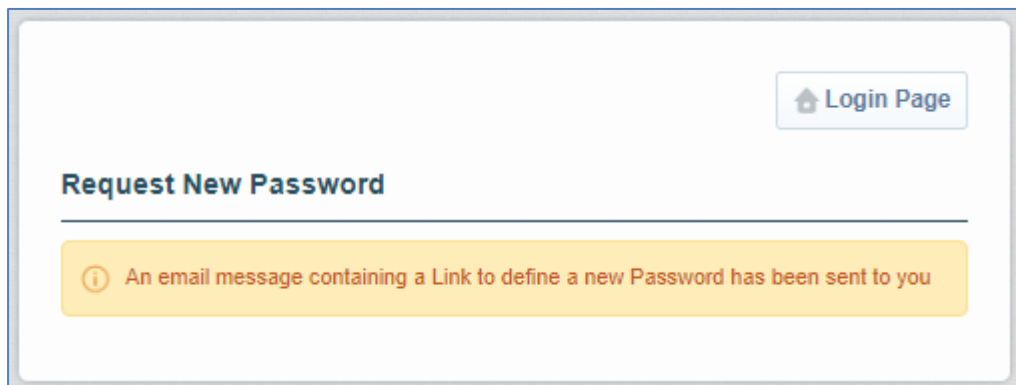
**Login**  
Username   
Password   
- I cannot access my account  
- I am a new supplier user  
**Enter**

- On the next page, enter your username and registered email address, then select [Submit].



A screenshot of a web form for password recovery. It features two input fields: 'Username' and 'Email', both preceded by a red asterisk indicating they are required. Below the 'Username' field is a button with a key icon labeled 'Recover Username'. Below the 'Email' field are two buttons: a green 'Submit' button and a white 'Cancel' button with a red 'X' icon. A red arrow points from the text 'then select [Submit]' in the preceding list item to the 'Submit' button.

- Success will be indicated by the following message.

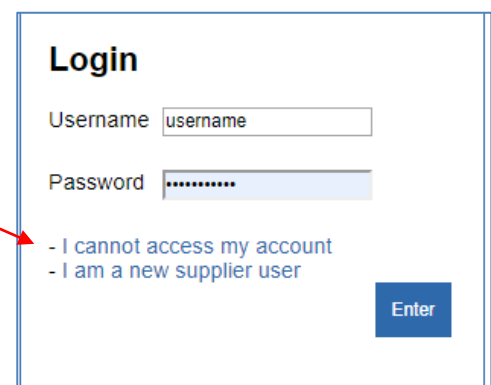


A screenshot of a web page titled 'Request New Password'. In the top right corner is a button labeled 'Login Page' with a house icon. Below the title is a yellow message box with an information icon and the text: 'An email message containing a Link to define a new Password has been sent to you'.

- On receipt of the email, follow the instructions to reset your password.

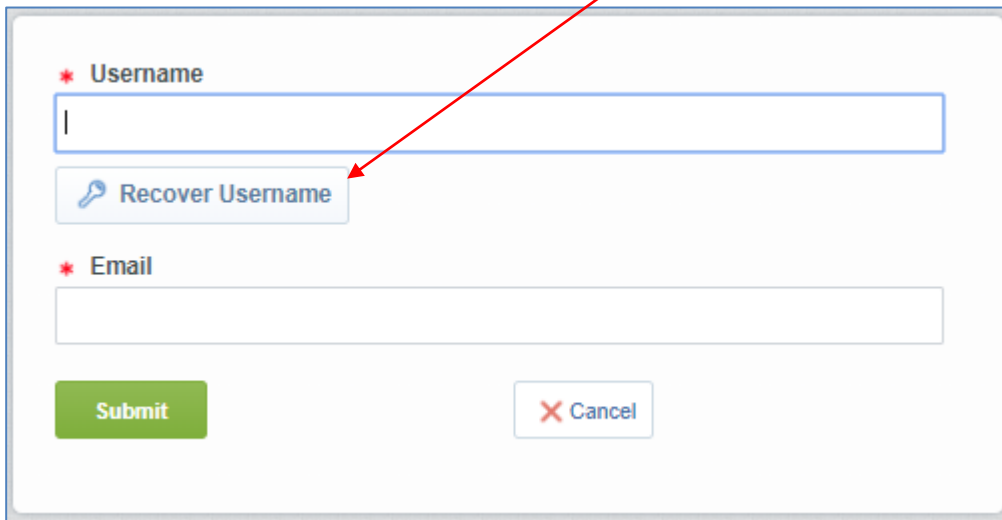
#### 1.4 How to recover your Username

On the Login Page select "I cannot access my account".

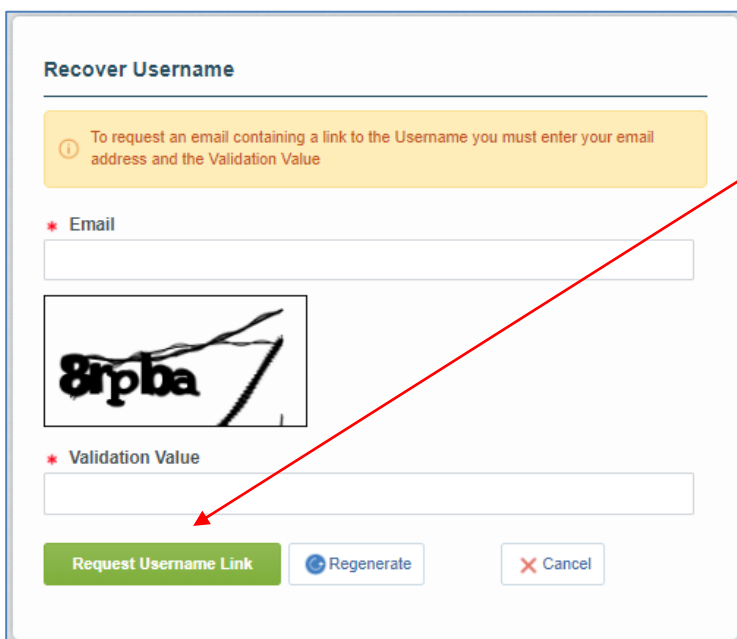


A screenshot of a 'Login' page. It has two input fields: 'Username' (containing the text 'username') and 'Password' (containing seven dots). Below these fields are two links: '- I cannot access my account' and '- I am a new supplier user'. A red arrow points from the text 'select "I cannot access my account"' in the preceding paragraph to the first link. At the bottom right is a blue 'Enter' button.

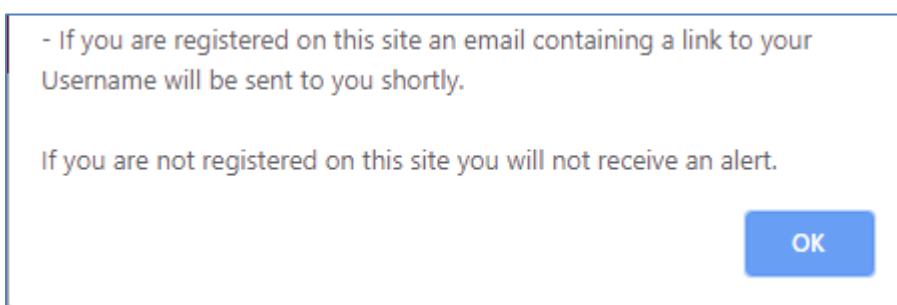
- On the next page, select “Recover Username”.



- Enter your email address and the displayed “Validation Value”, then select “Request Username Link”.



- Note the confirmation pop-up message, and select [OK] to close the pop-up.



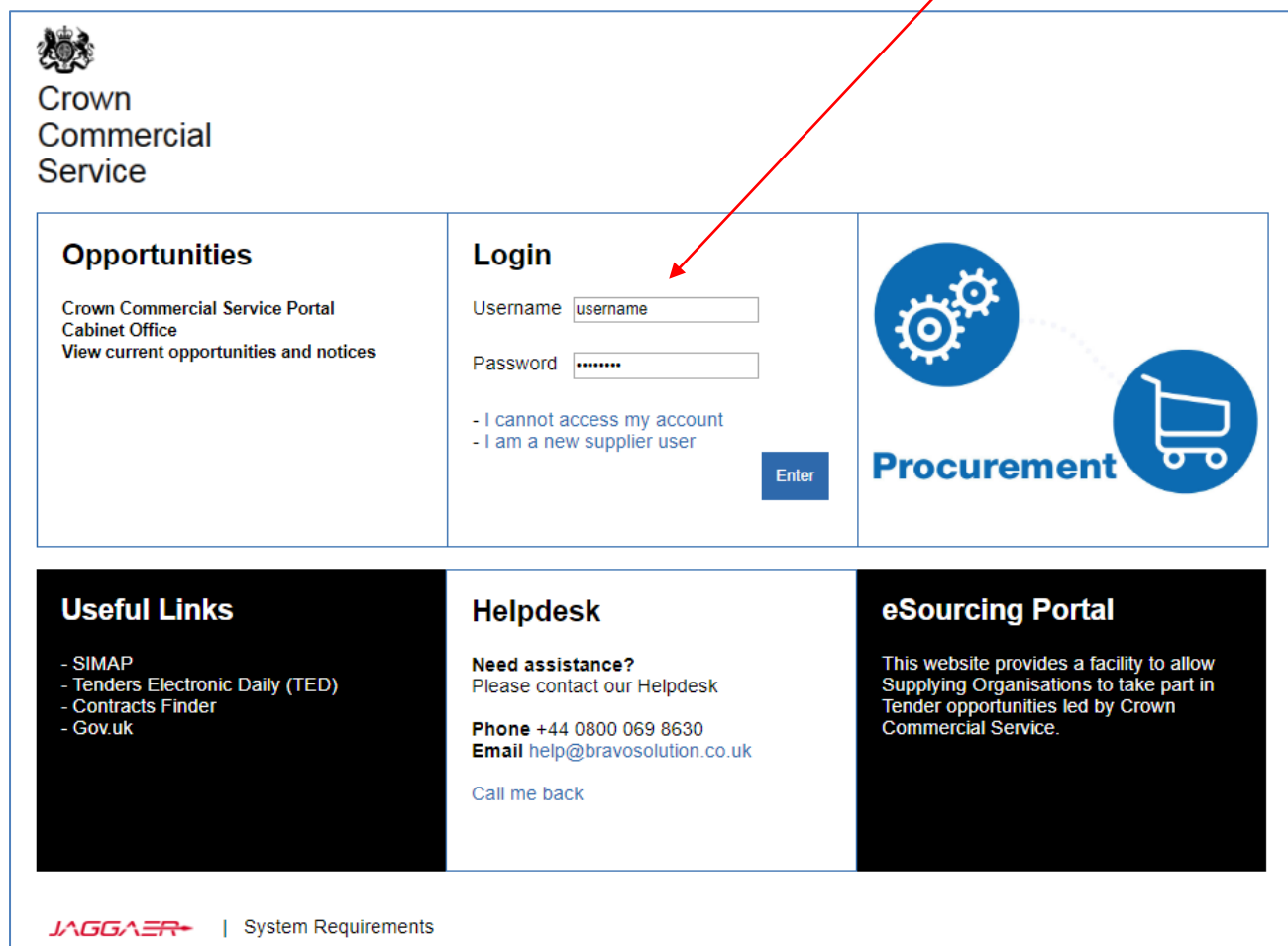
- On receipt of the email, follow the instructions to recover your Username.

## Section 2. Accessing the eSourcing System

### 2.1 Accessing the Sourcing System

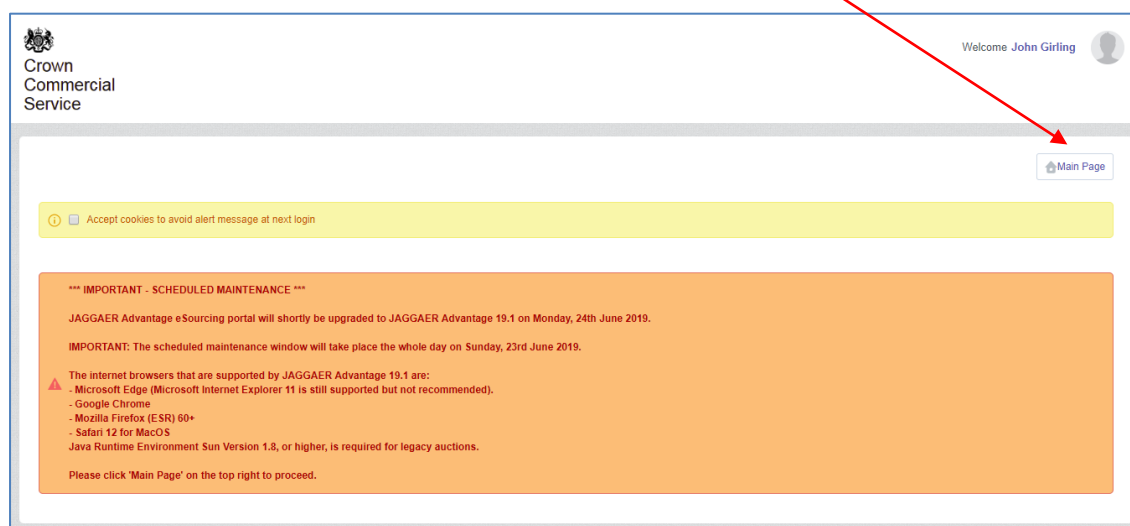
Navigate to the Login Page at: <https://crowncommercialservice.bravosolution.co.uk>

Enter your username and password in the indicated fields and select [Enter].



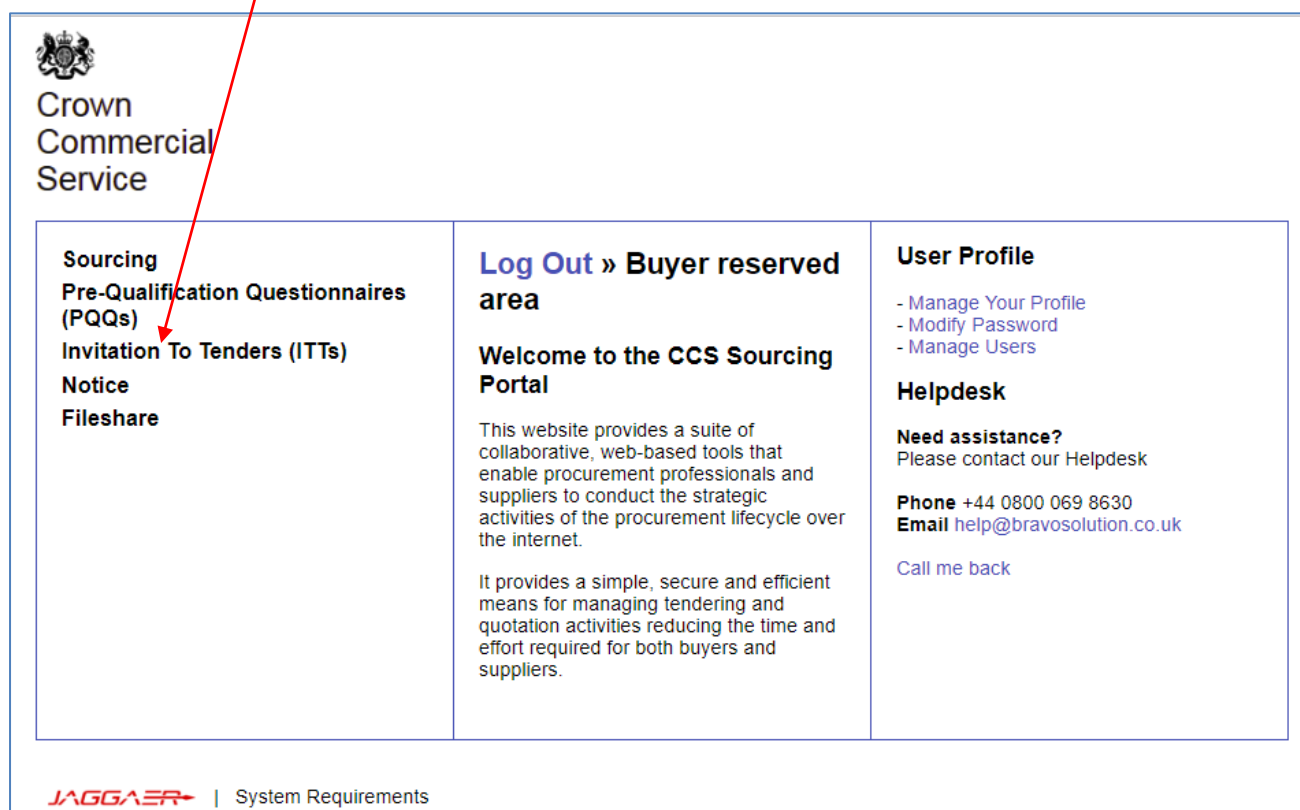
The screenshot shows the Crown Commercial Service login page. At the top left is the Crown Commercial Service logo. Below it, the page is divided into three main sections: Opportunities, Login, and Procurement. The Opportunities section includes links to the Crown Commercial Service Portal, Cabinet Office, and current opportunities. The Login section has fields for Username and Password, with a red arrow pointing to the Password field. Below the fields are links for 'I cannot access my account' and 'I am a new supplier user', and an 'Enter' button. The Procurement section features a large blue circle with a shopping cart icon and the word 'Procurement'. Below these sections are three columns: Useful Links (SIMAP, Tenders Electronic Daily (TED), Contracts Finder, Gov.uk), Helpdesk (Need assistance?, contact details, Call me back), and eSourcing Portal (description of the facility). At the bottom left is the JAGGAER logo and 'System Requirements'.

This message page may be displayed if there is a message relating to the system from the Service Provider or Crown Commercial Service. Select [Main Page] to proceed.



The screenshot shows a message page from the Crown Commercial Service. At the top left is the Crown Commercial Service logo. At the top right, it says 'Welcome John Girling' next to a user profile icon. Below this is a 'Main Page' button with a red arrow pointing to it. A yellow banner at the top says 'Accept cookies to avoid alert message at next login'. Below this is a large orange box containing a message about scheduled maintenance for the JAGGAER Advantage eSourcing portal. The message states that the portal will be upgraded to JAGGAER Advantage 19.1 on Monday, 24th June 2019, and that the scheduled maintenance window will take place the whole day on Sunday, 23rd June 2019. It also lists supported internet browsers (Microsoft Edge, Google Chrome, Mozilla Firefox (ESR) 60+, Safari 12 for MacOS) and the Java Runtime Environment (Sun Version 1.8, or higher, is required for legacy auctions). At the bottom of the orange box, it says 'Please click "Main Page" on the top right to proceed.'

The Landing Page will now be displayed. Select the option “Invitations To Tenders (ITTs)”, this will list events with which you are associated and where you can create a new further competition.



**Crown Commercial Service**

**Sourcing**  
Pre-Qualification Questionnaires (PQQs)  
**Invitation To Tenders (ITTs)**  
Notice  
Fileshare

**Log Out » Buyer reserved area**

**Welcome to the CCS Sourcing Portal**

This website provides a suite of collaborative, web-based tools that enable procurement professionals and suppliers to conduct the strategic activities of the procurement lifecycle over the internet.

It provides a simple, secure and efficient means for managing tendering and quotation activities reducing the time and effort required for both buyers and suppliers.

**User Profile**

- [Manage Your Profile](#)
- [Modify Password](#)
- [Manage Users](#)

**Helpdesk**

**Need assistance?**  
Please contact our Helpdesk

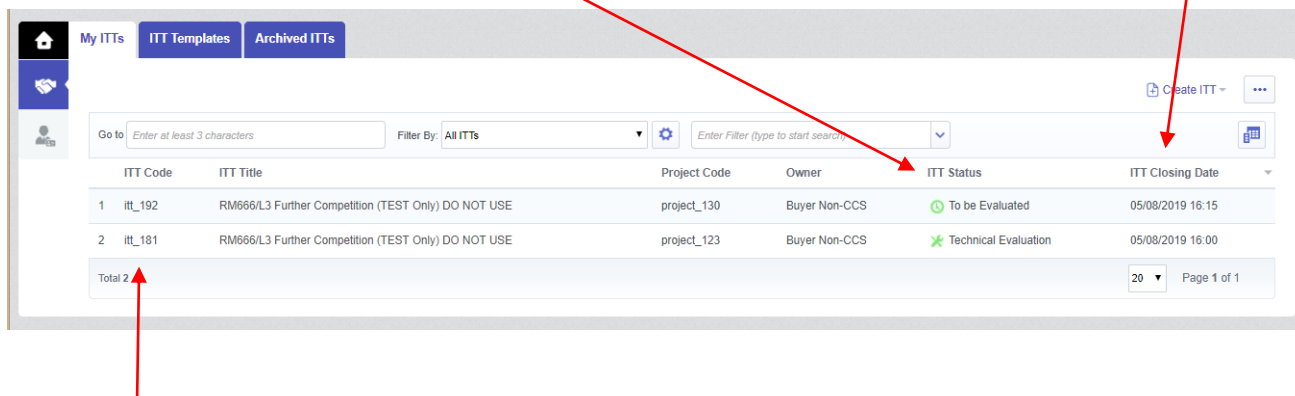
**Phone** +44 0800 069 8630  
**Email** [help@bravosolution.co.uk](mailto:help@bravosolution.co.uk)

[Call me back](#)

**JAGGAER** | System Requirements

## 2.2 “Invitations To Tender (ITTs)”

This page will list those events to which you have access, showing details such as the “ITT Closing Date” and its status.



My ITTs | ITT Templates | Archived ITTs

Go to:  Enter at least 3 characters | Filter By: All ITTs |  Enter Filter (type to start searching) |  |

	ITT Code	ITT Title	Project Code	Owner	ITT Status	ITT Closing Date
1	itt_192	RM666/L3 Further Competition (TEST Only) DO NOT USE	project_130	Buyer Non-CCS	<span style="color: green;">✔</span> To be Evaluated	05/08/2019 16:15
2	itt_181	RM666/L3 Further Competition (TEST Only) DO NOT USE	project_123	Buyer Non-CCS	<span style="color: green;">✗</span> Technical Evaluation	05/08/2019 16:00
Total 2						20   Page 1 of 1

The “ITT\_Code” is a unique reference to an event.



## 2.3 ITT Details Page

Selecting an event will open its details and allow you access to the event.

This example is currently “running” (ie bidders can respond) and it shows one of the 2 invited suppliers has replied (submitted a response).

The screenshot displays the ITT Details Page for 'ITT: itt\_192 - RM666/L3 Further Competition (TEST Only) DO NOT USE'. The page includes a 'Back to List' button, a 'Save as new ITT' button, and a 'Running' status indicator. The 'Details' tab is active, showing 'Project: project\_130- CCS Widgets Requirement 050819' and 'Closing Date: 09/08/2019 15:00:00'. Below the tabs, there are buttons for 'Monitor', 'Alerts', and 'Status History'. The 'Monitor Supplier Progress (current round: 0)' section shows a table with columns for Suppliers, Date Details Accessed, Response Status, and Response Round. The table lists two suppliers: 'CCS\_Test\_Supplier\_JG' and 'CCS Test Supplier AS'. The first supplier has a 'Replied' status and a response round of 0. The second supplier has a 'Not Replied' status and a response round of -.

Suppliers	Date Details Accessed	Response Status	Response Round
1 CCS_Test_Supplier_JG	05/08/2019 16:09	Replied	0
2 CCS Test Supplier AS	-	Not Replied	-

Total answers available (all rounds): 1

If you wish to communicate with the Suppliers participating in this event you must use the messaging facility as described in Section 6.

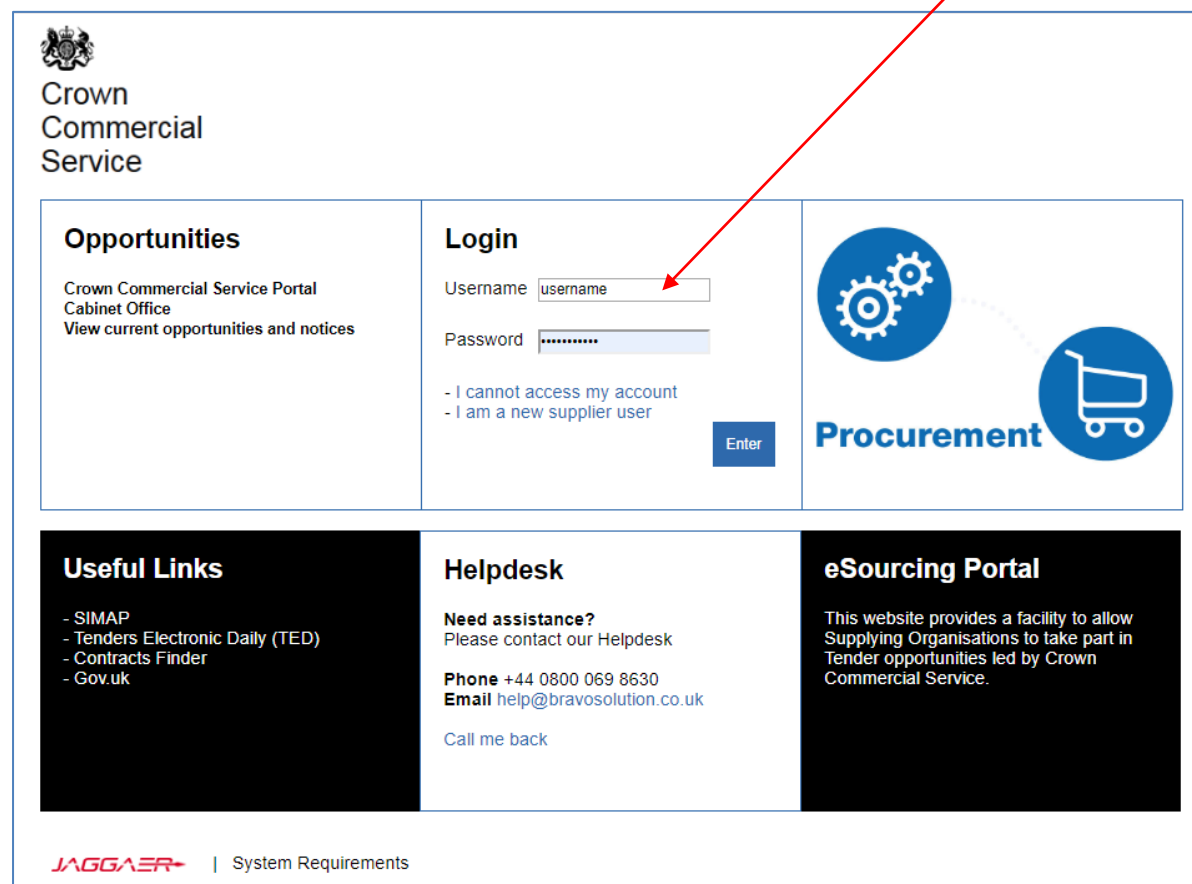
## Section 3 Creating a new Further Competition Event (Project and ITT)

### 3.1 Introduction

In order to simplify creating a further competition, the process uses templates which have been made available by CCS. Using templates ensures that the necessary suppliers are invited into your Further Competition, and also that the event has the necessary functionality and data available to it. It's necessary to first create a project (as a "container") and then the ITT (further competition) event.

### 3.2 Accessing the Sourcing System

Enter your username and password in the indicated fields and select [Enter].



**Crown Commercial Service**

**Opportunities**  
Crown Commercial Service Portal  
Cabinet Office  
View current opportunities and notices

**Login**  
Username   
Password   
- I cannot access my account  
- I am a new supplier user  
**Enter**

**Procurement**

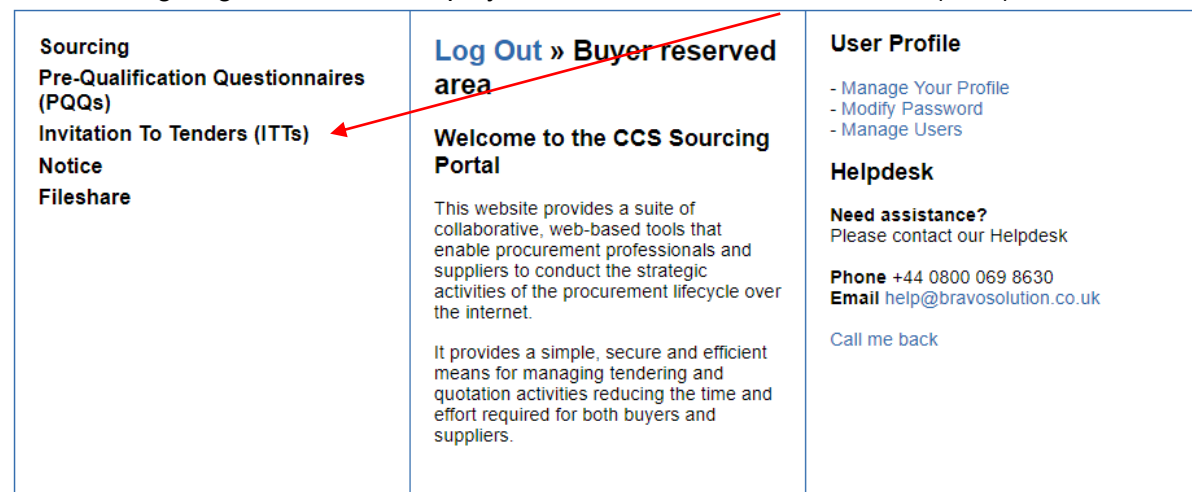
**Useful Links**  
- SIMAP  
- Tenders Electronic Daily (TED)  
- Contracts Finder  
- Gov.uk

**Helpdesk**  
**Need assistance?**  
Please contact our Helpdesk  
**Phone** +44 0800 069 8630  
**Email** [help@bravosolution.co.uk](mailto:help@bravosolution.co.uk)  
[Call me back](#)

**eSourcing Portal**  
This website provides a facility to allow Supplying Organisations to take part in Tender opportunities led by Crown Commercial Service.

**JAGGAER** | System Requirements

The Landing Page will now be displayed, select "Invitations to Tenders (ITTs)"



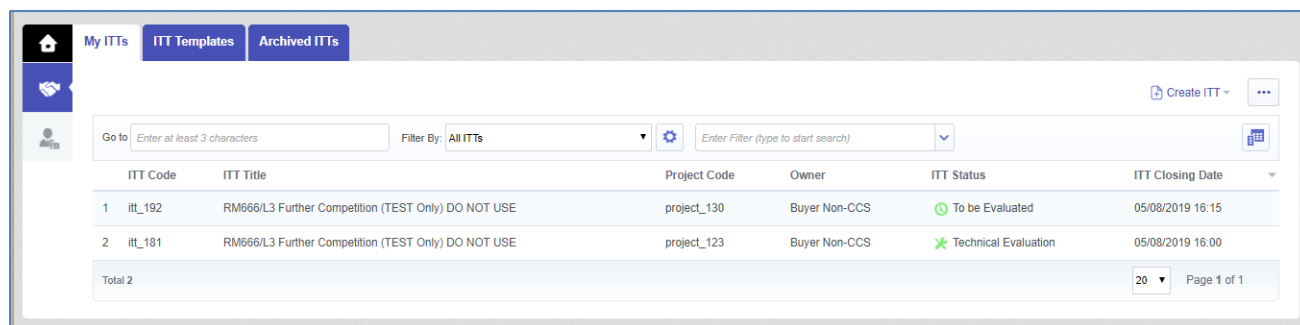
**Sourcing**  
Pre-Qualification Questionnaires (PQQs)  
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It provides a simple, secure and efficient means for managing tendering and quotation activities reducing the time and effort required for both buyers and suppliers.

**User Profile**  
- [Manage Your Profile](#)  
- [Modify Password](#)  
- [Manage Users](#)  
**Helpdesk**  
**Need assistance?**  
Please contact our Helpdesk  
**Phone** +44 0800 069 8630  
**Email** [help@bravosolution.co.uk](mailto:help@bravosolution.co.uk)  
[Call me back](#)

**JAGGAER** | System Requirements

The “Invitations To Tenders (ITTs)” Page lists the ITTs to which you currently have access.



My ITTs | ITT Templates | Archived ITTs

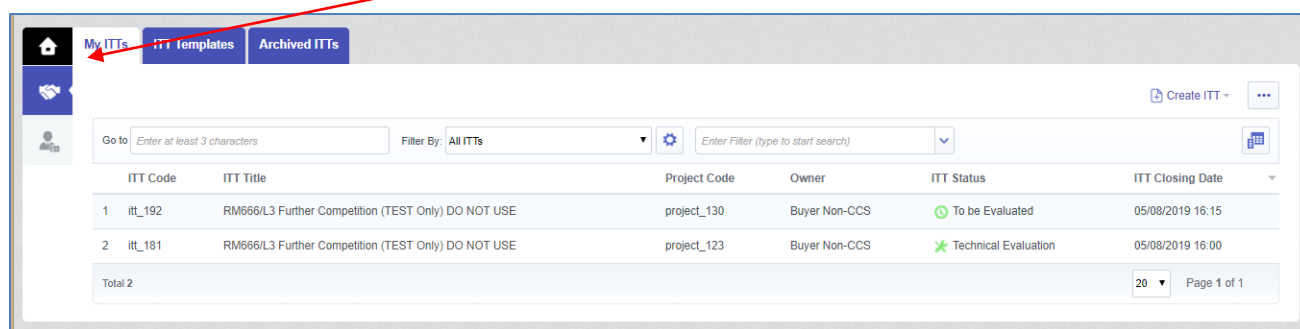
Create ITT +

Go to:  Filter By: All ITTs

ITT Code	ITT Title	Project Code	Owner	ITT Status	ITT Closing Date
1 itt_192	RM666/L3 Further Competition (TEST Only) DO NOT USE	project_130	Buyer Non-CCS	To be Evaluated	05/08/2019 16:15
2 itt_181	RM666/L3 Further Competition (TEST Only) DO NOT USE	project_123	Buyer Non-CCS	Technical Evaluation	05/08/2019 16:00
Total 2					20 Page 1 of 1

### 3.3 Creating your Project and ITT (further competition)

- Select “Sourcing > Projects > My Projects” from the side menu.



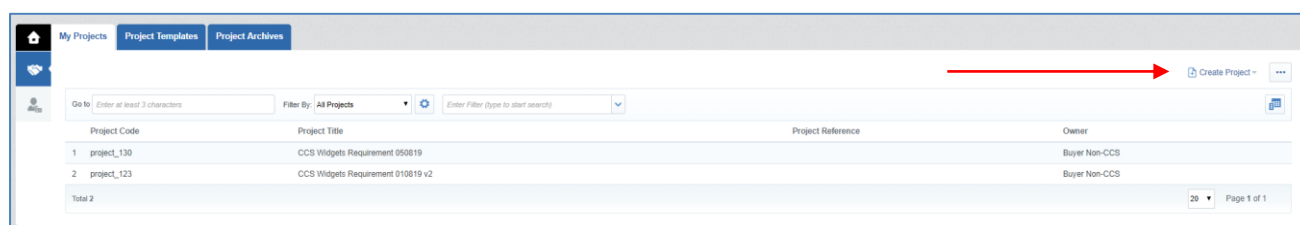
My Projects | Project Templates | Project Archives

Create Project +

Go to:  Filter By: All Projects

Project Code	Project Title	Project Reference	Owner
1 project_130	CCS Widgets Requirement 050819		Buyer Non-CCS
2 project_123	CCS Widgets Requirement 010819 v2		Buyer Non-CCS
Total 2			20 Page 1 of 1

- On the “My Projects” Page, select “Create Project” and the option “From Template”.



My Projects | Project Templates | Project Archives

Create Project +

Go to:  Filter By: All Projects

Project Code	Project Title	Project Reference	Owner
1 project_130	CCS Widgets Requirement 050819		Buyer Non-CCS
2 project_123	CCS Widgets Requirement 010819 v2		Buyer Non-CCS
Total 2			20 Page 1 of 1

As there is only one Project Template it will default to this one and display as below;

- Enter in the “Project Title” field a suitable entry to display your organisation name and a brief title to your procurement (eg CCS Widgets Requirement 2019), **do not select “Copy Original Title”**. This is to aid identification by the invited suppliers when the event is published.
- Select [Create].

New Project

Original Code  
project\_122

Project Code  
project\_142

Project Title  
Copy Original Title

ITT behaviour in Project  
NOTE: ITTs normally behave INDEPENDENTLY of other objects. Multi Lot ITTs may be configured with the same closing date and time and used to share evaluation decisions made in a main PQ/ITT.  
Independent ITTs

Select Information to Copy

- ☒ Project Attributes Questions associated to the Project Type
- ☒ Project Attachments Project Attachments Visible Only to Buyers (1) and Visible to Suppliers (1)
- ☒ Project Team Project Team Members (0)

- On the following page, select [Save].

Project: project\_142 - CCS Widgets Requirement 2019

Project Header

Project Code  
project\_142

Project Title  
CCS Widgets Requirement 2019

Your project has now been saved, it will look similar to the following example.

- Links to guidance material for buyers and suppliers can be found pre-loaded in “Project Attachments”

Back to List

Project: project\_142 - CCS Widgets Requirement 2019

Details Communication

Settings Project Attachments (2) Project Objects (0) History Project Team (3)

Project Header

Project Code  
project\_142

Internal Project Description

Project Owner  
Non-CCS Buyer

Project Origin  
project\_122 - Call-Off Project - RENAME to show contracting authority and brief project scope

Project Title  
CCS Widgets Requirement 2019

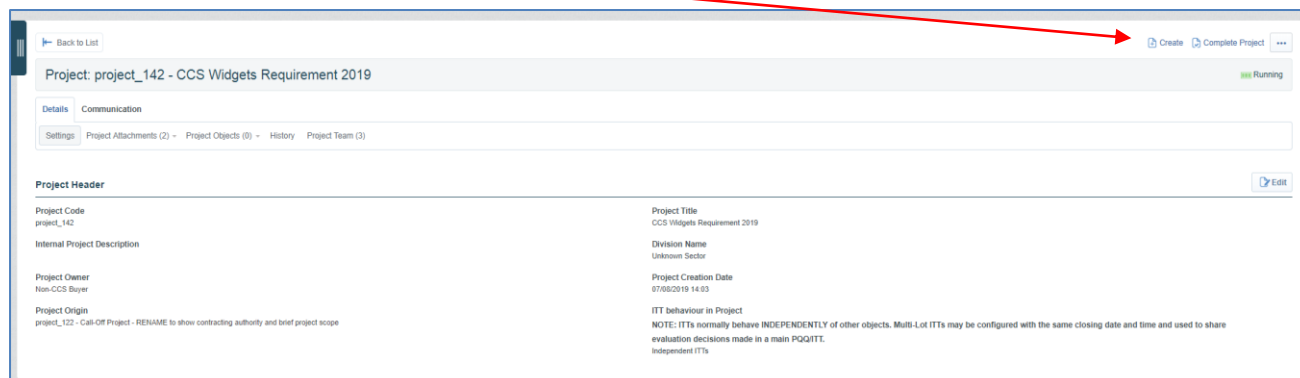
Division Name  
Unknown Sector

Project Creation Date  
07/08/2019 14:03

ITT behaviour in Project  
NOTE: ITTs normally behave INDEPENDENTLY of other objects. Multi Lot ITTs may be configured with the same closing date and time and used to share evaluation decisions made in a main PQ/ITT.  
Independent ITTs

The project is a “container” in which the ITT (further competition) can now be created.

- Select “Create”



Project: project\_142 - CCS Widgets Requirement 2019

Details Communication

Settings Project Attachments (2) - Project Objects (0) - History Project Team (3)

**Project Header**

Project Code: project\_142

Internal Project Description:

Project Owner: Non-CCS Buyer

Project Origin: project\_142 - Call-Off Project - RENAME to show contracting authority and brief project scope

Project Title: CCS Widgets Requirement 2019

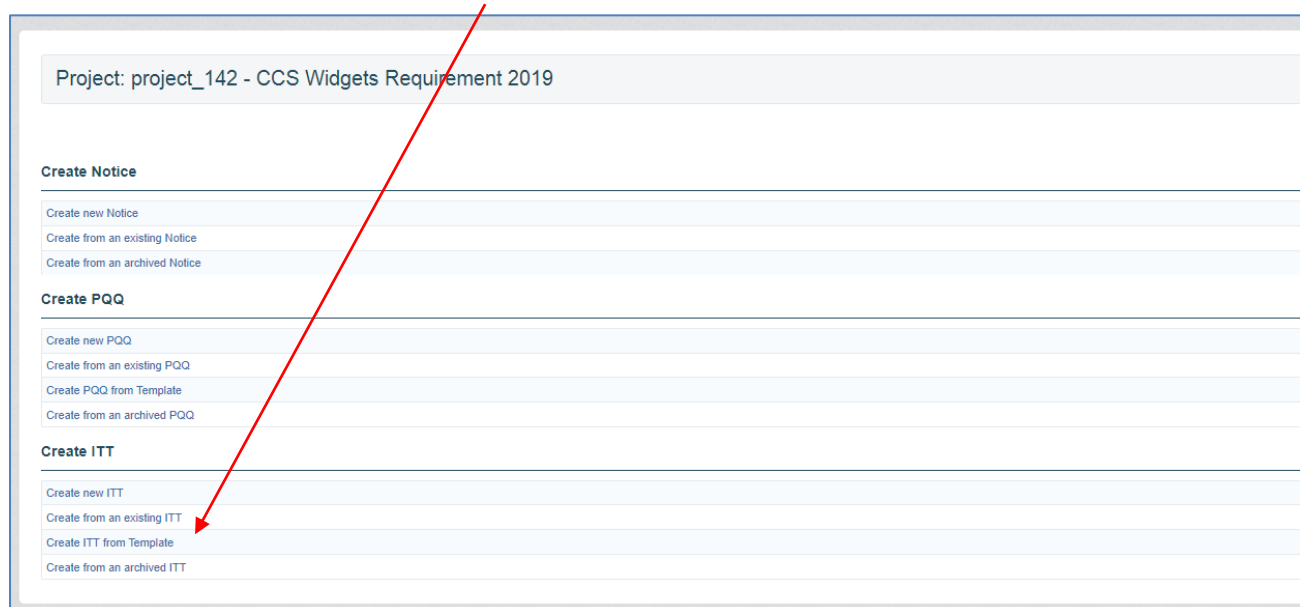
Division Name: Unknown Sector

Project Creation Date: 07/06/2019 14:03

ITT behaviour in Project: NOTE: ITTs normally behave INDEPENDENTLY of other objects. Multi-Lot ITTs may be configured with the same closing date and time and used to share evaluation decisions made in a main PQQ/ITT. Independent ITTs

Create Complete Project

- On this page, select “Create ITT from Template”.



Project: project\_142 - CCS Widgets Requirement 2019

**Create Notice**

Create new Notice

Create from an existing Notice

Create from an archived Notice

**Create PQQ**

Create new PQQ

Create from an existing PQQ

Create PQQ from Template

Create from an archived PQQ

**Create ITT**

Create new ITT

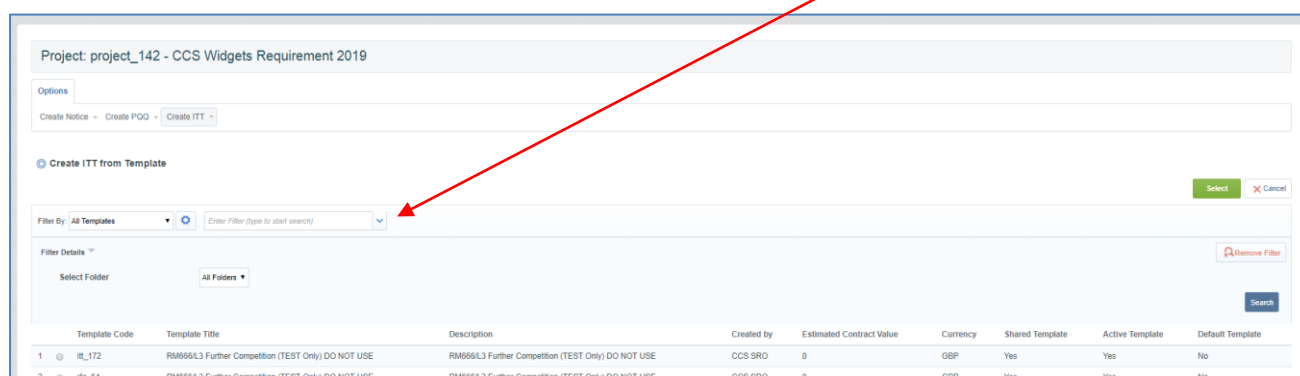
Create from an existing ITT

Create ITT from Template

Create from an archived ITT

The “Template Selection” Page will list large numbers of templates, to the find the templates for the agreement you are seeking:

- Select the filter “ITT Descriptions” from this drop-down list



Project: project\_142 - CCS Widgets Requirement 2019

Options

Create Notice - Create PQQ - Create ITT

**Create ITT from Template**

Filter By: All Templates

Enter Filter (type to start search)

Filter Details

Select Folder: All Folders

Template Code	Template Title	Description	Created by	Estimated Contract Value	Currency	Shared Template	Active Template	Default Template
1	ITL_172	RM666L3 Further Competition (TEST Only) DO NOT USE	CCS SRO	0	GBP	Yes	Yes	No
2	ITL_64	RM666L2 Further Competition (TEST Only) DO NOT USE	CCS SRO	0	GBP	Yes	Yes	No

- The page will update to display these new features to allow you to search for the agreement:

- In the “ITT Descriptions” drop down select “Contains” and the agreement RM number in the text field as shown below.

- Now select [Search] to process the search criteria.

- The page will update to show the templates found by the search.

	Template Code	Template Title	Description	Created by	Estimated Contract Value	Currency	Shared Template	Active Template	Default Template
1	itl_172	RM666L3 Further Competition (TEST Only) DO NOT USE	RM666L3 Further Competition (TEST Only) DO NOT USE	CCS SRO	0	GBP	Yes	Yes	No
2	rlq_64	RM666L2 Further Competition (TEST Only) DO NOT USE	RM666L2 Further Competition (TEST Only) DO NOT USE	CCS SRO	0	GBP	Yes	Yes	No
Total 2									20 Page 1 of 1

- Select the radio button to identify the required template and select [Select].

- On this page, select “Copy Original Title”, this will ensure the Agreement and Lot details are clearly visible to the invited suppliers.
- Select [Save].

Project: project\_142 - CCS Widgets Requirement 2019

Originating Template Code  
#\_172

ITT Code  
#\_275

Project Code  
project\_142

ITT Type  
Standard ITT

ITT Title  
RM666/L3 Further Competition (TEST Only) DO NOT

Copy Original Title

Save Cancel

This page will display the details of the selected ITT (further competition) template which can then be prepared for publication by adding the attachments you wish to share with the invited suppliers.

- Do not select [Edit] and make changes to this page, unless under the direction of CCS, as changing the configuration will impact the way in which your ITT (further competition) functions.

Back to List

ITT: itt\_275 - RM666/L3 Further Competition

Project project\_142- CCS Widgets Requirement 2019

Closing Date:

Details Publish Evaluation Setup Complete Discussions

Settings Attachments (1) Response Form (1) Email Recipients Redefine Rights Suppliers (2)

Overview

ITT Code  
#\_275

ITT Title  
RM666/L3 Further Competition

ITT Description  
Copied from  
#\_172

Edit

### 3.4 Preparing your ITT for publication

As a minimum, before publication, it will be necessary to add those documents which you wish to share with the invited suppliers. You may also wish to invite a colleague to the project to help manage communication with the suppliers in case of unplanned absence.

#### 3.4a To upload attachments:

- Select “Attachments” and the “Visible to Suppliers” option.
- If you find attachments already present under “Visible Only to Buyers” these are probably Rate Cards relating to the agreement, you may wish to review them in the context of your procurement. This location will never become visible to suppliers invited to the event.

Back to List

ITT: itt\_275 - RM666/L3 Further Competition

Project project\_142- CCS Widgets Requirement 2019

Closing Date:

Details Publish Evaluation Setup Complete Discussions

Settings Attachments (1) Response Form (1) Email Recipients Redefine Rights Suppliers (2)

Overview

Visible Only to Buyers (1)

Visible to Suppliers (0)

ITT Code  
#\_275

ITT Title  
RM666/L3 Further Competition

Edit

- On this page select [Upload New File].

Visible to Suppliers (0)  
 Path: Top Level >  
 Enter Filter (type to start search)  
 No results to display

- Note the comment in the highlighted zone there is a maximum file size of 50MB in place, the larger the file size the longer it will take to upload, this maximum size cannot be exceeded.
- Either, “Drag and Drop” your selected file(s) into the shaded area, or select [Select a File to Upload] and use the dialog box to select your required file(s). Note the guidance in the highlighted zones.

Attachments  
 Select file to upload:  
 Please keep attachments to a manageable size in order to facilitate downloading. The portal allows individual attachments up to a maximum size of 50MB but we recommend that you keep attachments to 25MB or less.  
 File extensions not permitted: .bat, .chm, .cmd, .com, .cpl, .ctt, .exe, .flp, .hta, .inf, .ins, .isp, .jse, .lnk, .mdb, .ms, .poc, .pdf, .reg, .scr, .sct, .shs, .vb, .vbs  
 Attachments  
 # Type File Name Size  
 Use the button to Upload or DRAG and DROP into this area

- With your file(s) selected, select [Confirm] to perform the upload.

Attachments  
 Select file to upload:  
 Please keep attachments to a manageable size in order to facilitate downloading. The portal allows individual attachments up to a maximum size of 50MB but we recommend that you keep attachments to 25MB or less.  
 File extensions not permitted: .bat, .chm, .cmd, .com, .cpl, .ctt, .exe, .flp, .hta, .inf, .ins, .isp, .jse, .lnk, .mdb, .ms, .poc, .pdf, .reg, .scr, .sct, .shs, .vb, .vbs  
 Attachments  
 # Type File Name Size  
 1 PDF 1. Dummy Customer Tender Document.pdf 27.2 kb  
 2 PDF 2. Dummy Customer Specification.pdf 13.8 kb  
 3 PDF 3. Dummy Customer Response Document.pdf 13.8 kb  
 Replace Files Remove All Files  
 Confirm Cancel

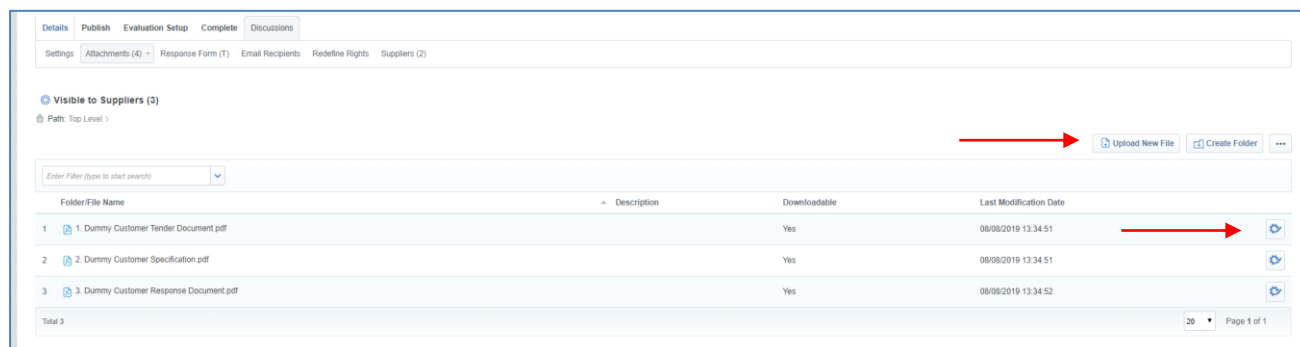
- Select [Save All] to make the uploaded files part of the event.

Attachments  
 Select file to upload:  
 Please keep attachments to a manageable size in order to facilitate downloading. The portal allows individual attachments up to a maximum size of 50MB but we recommend that you keep attachments to 25MB or less.  
 File extensions not permitted: .bat, .chm, .cmd, .com, .cpl, .ctt, .exe, .flp, .hta, .inf, .ins, .isp, .jse, .lnk, .mdb, .ms, .poc, .pdf, .reg, .scr, .sct, .shs, .vb, .vbs  
 Attachments  
 # Type File Name Description Downloadable Last Modification Date  
 1 PDF 1. Dummy Customer Tender Document.pdf Yes 08/08/2019 13:34:51  
 2 PDF 2. Dummy Customer Specification.pdf Yes 08/08/2019 13:34:51  
 3 PDF 3. Dummy Customer Response Document.pdf Yes 08/08/2019 13:34:52  
 Total 3  
 Save All Cancel All  
 Upload New File Create Folder  
 20 Page 1 of 1



The uploaded files are visible as part of the event. Additional attachments can be uploaded by selecting [Upload New File]. To remove an incorrect uploaded file:

- Select the relevant “gear” icon.



- On this File Details page, select the “...” and “Delete File” option.



After the event has been published to suppliers, it is not possible to delete files as they part of an audit trail, files can be blocked from being further downloaded by selecting the File Details page:

- Select [Edit].
- Select “Blocked Download” to “Yes” and [Save].



### 3.4b To add a colleague to your Project (and ITT)

In order to be capable of being added to your project, your colleague must be registered on the eSourcing system (see Section 1.2). To add your colleague to your project:

- Select the link to the “project code”.

ITT: itt\_275 - BM668/L3 Further Competition  
Project project\_142 - CCS Widgets Requirement 2019  
Closing Date: [blank]  
To be Published

Details Publish Evaluation Setup Complete Discussions  
Settings Attachments (4) Response Form (1) Email Recipients Redefine Rights Suppliers (2)

- Select “Project Team”.

Project: project\_142 - CCS Widgets Requirement 2019  
Running

Details Communication  
Settings Project Attachments (2) Project Objects (1) History Project Team (3)

- Select [+Add].

Last Name	First Name	Email	Division Name	Role
1 Buyer	Non-CCS	john.girling@outlook.com	Unknown Sector	Non-CCS Call-Off Buyer
2 Sector	Unknown	no-reply@aggaer.com	Unknown Sector	
3 Self-Serve	SRO	john.girling@crownccommercial.gov.uk	Division	

Total 3 20 Page 1 of 1

- Type your colleagues name in the “Quick Selection” field and select from the list when displayed.

Select Users to add to Project Team

Quick Selection by Name: Type to search in full users list [Select with Search Criteria]

- The selected colleague will be displayed (as below), then select [Save].

Select Users to add to Project Team

Quick Selection by Name: Type to search in full users list [Remove All]

Last Name	First Name	Email	Division	Role Name
1 Girling	John	john.girling@crownccommercial.gov.uk	Division	Super User

- Confirmation of the successful addition of your colleague is provided by the updated list, an email alert will go to your colleague.

Last Name	First Name	Email	Division Name	Role
1 Buyer	Non-CCS	john.girling@outlook.com	Unknown Sector	Non-CCS Call-Off Buyer
2 Girling	John	john.girling@crownccommercial.gov.uk	Division	Super User
3 Sector	Unknown	no-reply@aggaer.com	Unknown Sector	
4 Self-Serve	SRO	john.girling@crownccommercial.gov.uk	Division	

Total 4 20 Page 1 of 1

### 3.5 Publishing your ITT (further competition)

Login and navigate to the “My ITTs” page.

- Select from the listing the ITT you wish publish.
- Select the [Edit] button.
- On this page enter the required closing date/time in the “Closing Date” field. The date field has a calendar function to ensure only valid dates can be entered.
- Note the comments in the highlighted zone:
  - Please click “Publish” to publish the ITT or
  - “Cancel” to return to the ITT Details.

The screenshot shows the 'Publishing Details' section of the ITT publishing interface. At the top, there is a yellow banner with a warning icon and text: 'Are you sure you want to publish the ITT to Suppliers? Please click "Publish" to publish the ITT or "Cancel" to return to the ITT Details.' To the right of this banner are three buttons: 'Publish' (green), 'Preview Alert' (blue), and 'Cancel' (red). Below the banner, there is a section titled 'Settings for allowing general attachments in Supplier responses:' with a sub-section 'Uploading of General Attachments' containing a table with two rows: 'Technical Envelope' and 'Not Allowed'. Below this is the 'Publishing Details' section, which includes a 'Closing Date' field with a calendar icon and a 'PMT:non' field.

- On successful publication of the ITT, the “My ITTs” page will be displayed showing the ITT as “Running” and the “ITT Closing Date”.

The screenshot shows the 'My ITTs' page with a table of ITTs. The table has columns for ITT Code, ITT Title, Project Code, Owner, ITT Status, and ITT Closing Date. There are three ITTs listed, all with a status of 'Running' or 'Technical Evaluation'. Red arrows from the text above point to the 'Running' status and the 'ITT Closing Date' column.

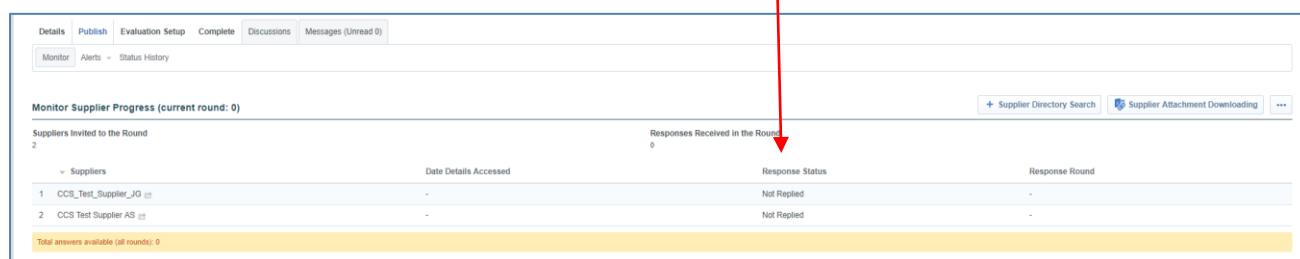
ITT Code	ITT Title	Project Code	Owner	ITT Status	ITT Closing Date
1	RM666L3 Further Competition	project_142	Buyer Non-CCS	Running	16/08/2019 15:00
2	RM666L3 Further Competition (TEST Only) DO NOT USE	project_130	Buyer Non-CCS	Running	09/08/2019 15:00
3	RM666L3 Further Competition (TEST Only) DO NOT USE	project_123	Buyer Non-CCS	Technical Evaluation	05/08/2019 16:00
Total 3					

## Section 4. Managing a “live” ITT (further competition)

### 4.1 Monitoring a “live” ITT (further competition)

Login and navigate to the “My ITTs” page.

- Select from the listing the ITT (further competition) you wish publish.
- The default view of the ITT (further competition) will be the “Publish > Monitor” page.
- This page will show the status response of the bidders.



Monitor Supplier Progress (current round: 0)				
Suppliers Invited to the Round		Responses Received in the Round		
2		0		
Suppliers	Date Details Accessed	Response Status	Response Round	
1 CCS_Test_Supplier_JG	-	Not Replied	-	
2 CCS_Test Supplier AS	-	Not Replied	-	
Total answers available (all rounds): 0				

NOTE 1: If there are any messages from the suppliers, refer to Section 6 for the guidance on the messaging functionality.

NOTE 2: If it's necessary to upload new attachments, for example revised documents or a list of responses to clarification questions, refer to the guidance in Section 3.4a.

### 4.2 The ITT (further competition) closes

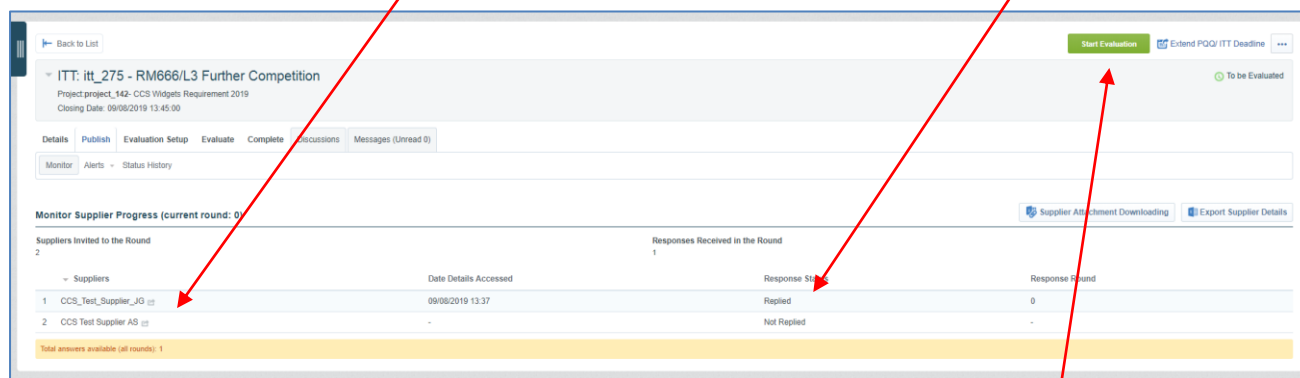
When the deadline, you entered at publication, is reached the ITT will automatically close. This will prevent suppliers submitting any further responses or revising an existing response. You need not take any action at this time.

### 4.3 Accessing the bidder's submitted responses

When the ITT has closed and you wish to access attachments that the bidders have uploaded as their response:

- Navigate to the “My ITTs” page.
- Select the required ITT from the displayed list, in order to open the ITT Details page, it will default to the “Publish > Monitor” tab (as shown below).

This example shows that 2 suppliers were invited to the ITT and one submitted a response.



Monitor Supplier Progress (current round: 0)				
Suppliers Invited to the Round		Responses Received in the Round		
2		1		
Suppliers	Date Details Accessed	Response Status	Response Round	
1 CCS_Test_Supplier_JG	09/08/2019 13:37	Replied	0	
2 CCS_Test Supplier AS	-	Not Replied	-	
Total answers available (all rounds): 1				

To gain access to the bidder(s) attachments:

- Select [Start Evaluation] which will display a similar page to that below.

- Select [Confirm] to continue or [X Do Not start Evalaution] to return to previous page.

Summary of Responses Received	
Suppliers Invited to the Current Round	2
Suppliers Responded to the Current Round	1
Suppliers Not Responded to the Current Round	1
Suppliers Declined to Respond to the Current Round	0

Number of Responses to the Current Round: 1

- This page will list the suppliers with submitted bids.
- Select [Open Technical Responses]. Confirm “OK” to the message in the first pop-up, the second pop-up with a cautionary message is not relevant as you will be evaluating offline, so it can also be confirmed “OK”.

Supplier	Round	Response Date	Accept/Reject Notes	Envelope Summary
1 CCS_Test_Supplier_JG	0	09/08/2019 13:38:14		
Total 1				

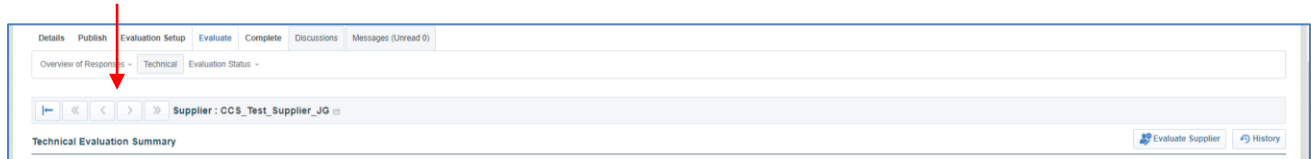
- This page will allow you to select which submitted response you wish to access, there has been only one response in this ITT.
- Select this icon for the bidder you wish to access.

Supplier	Round	Supplier Evaluation	Default Score	Current Technical Score	Technical Envelope First Accessed	Envelope First Accessed by Me	View Response
1 CCS_Test_Supplier_JG	0	Accepted					
Total 1							

- The attachment for the selected bidder can be accessed by selecting the file's link.

Question	Description	Response	Evaluation Comments (Question Level)	Average Suggested Score	Current Score (Default Score)
1.1.1	Tender Response Upload	My Zipped Tender Response.zip (53 KB)			

- Other bidder's files can be accessed by using the "<" and ">" arrows to move through the list of submitted bidders, allowing you to download the attachment when each bidder is displayed.



#### 4.4 Offline Evaluation

Once you have downloaded all the attachments returned by the bidders, you will be able to conduct any activities you planned leading up to the evaluation of the responses which is performed away from the eSourcing System.

## Section 5. After the Offline Evaluation

### 5.1 Introduction

After the offline evaluation has been completed, the % scores of the evaluation can now be entered against the bidder's submission record in the ITT, and the "Award" of the ITT can be recorded within the system. This process is intended to enable the generation of management information from the system, buyers should communicate the outcome of the evaluation to the bidders via messaging.

### 5.2a Recording the evaluation scoring

- Login and navigate to "My ITTs" and select the required ITT.
- Select this icon for the bidder you wish to access.

Supplier	Round	Response Date	Accept/Reject Notes	Envelope Summary
1 CCS_Test_Supplier_JG	0	09/08/2019 13:38:14		
Total 1				

Page 1 of 1

- Select [Edit Score].

Default Score: 0, Current Technical Score: 0

1. Technical Envelope

1.1 Tender Response - Question Section

Question	Description	Response	Evaluation Comments (Question Level)	Suggested Score	Current Score (Default Score)
1.1.1	Tender Response Upload	My Zipped Tender Response.zip (53 KB)	0 (0)	0 (0 sugg.)	0 (0)

- Enter the % score from your offline evaluation for the bidder in the "Current Score" field.
- Select [Save] to capture the score and return to the previous page.

Technical Evaluation Summary

Current Round: 0

Supplier Evaluation:

Current Response Evaluation (Past Response Evaluation): 0 (0)

Default Score: 0, Current Technical Score: 0

1. Technical Envelope

1.1 Tender Response - Question Section

Question	Description	Response	Evaluation Comments (Question Level)	Suggested Score	Current Score (Default Score)
1.1.1	Tender Response Upload	My Zipped Tender Response.zip (53 KB)	0 (0)	0 (0 sugg.)	0 (0)

- Other bidder's records can be accessed by using the "<" and ">" arrows to move through the list of submitted bidders, allowing you to select [Edit Score], enter the % score and [Save] once the required bidder's record is displayed.

Details | Publish | Evaluation Setup | Evaluate | Complete | Discussions | Messages (Unread 0)

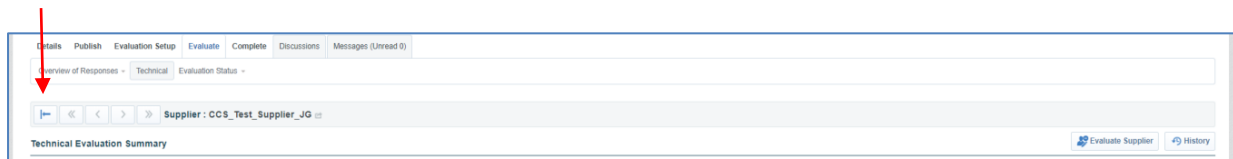
Overview of Responses: Technical Evaluation Status

Supplier: CCS\_Test\_Supplier\_JG

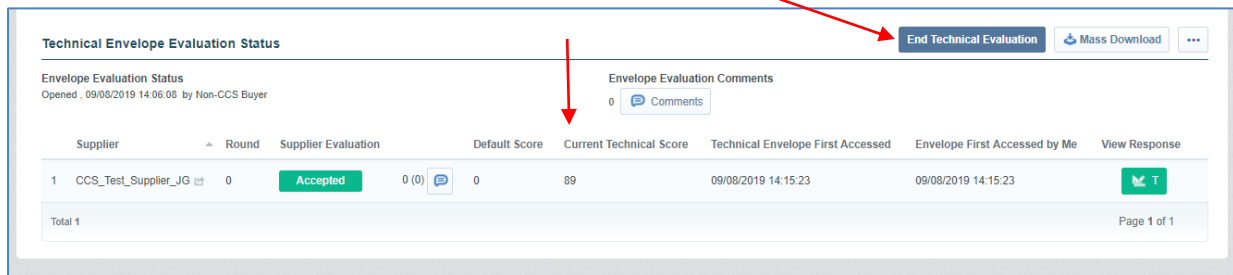
Technical Evaluation Summary

Evaluate Supplier | History

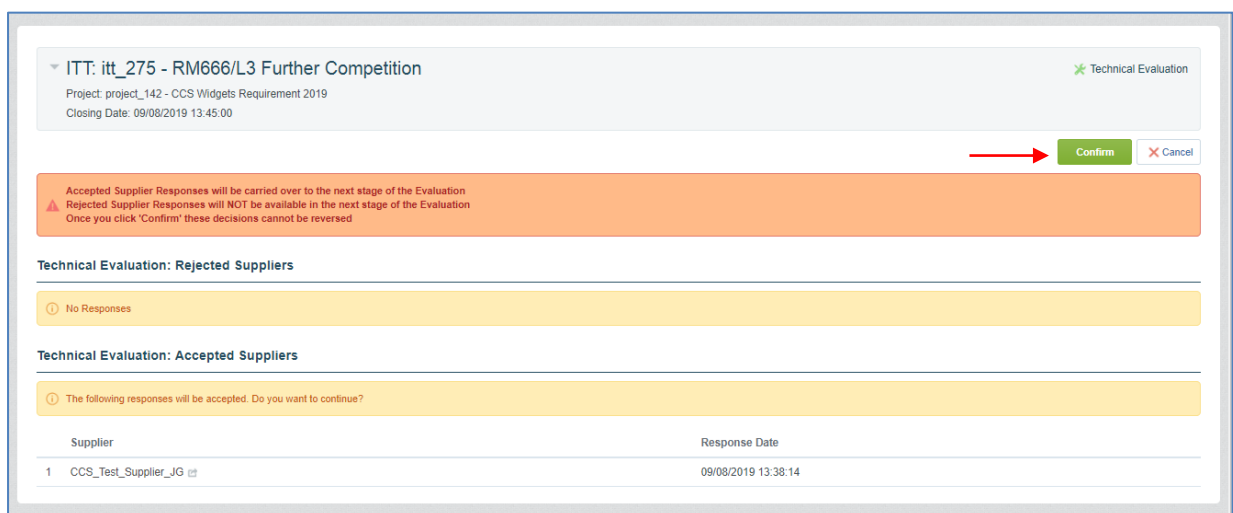
- On completion of entering the % scores, return to the “Technical Envelope Evaluation Status” page by selecting this button.



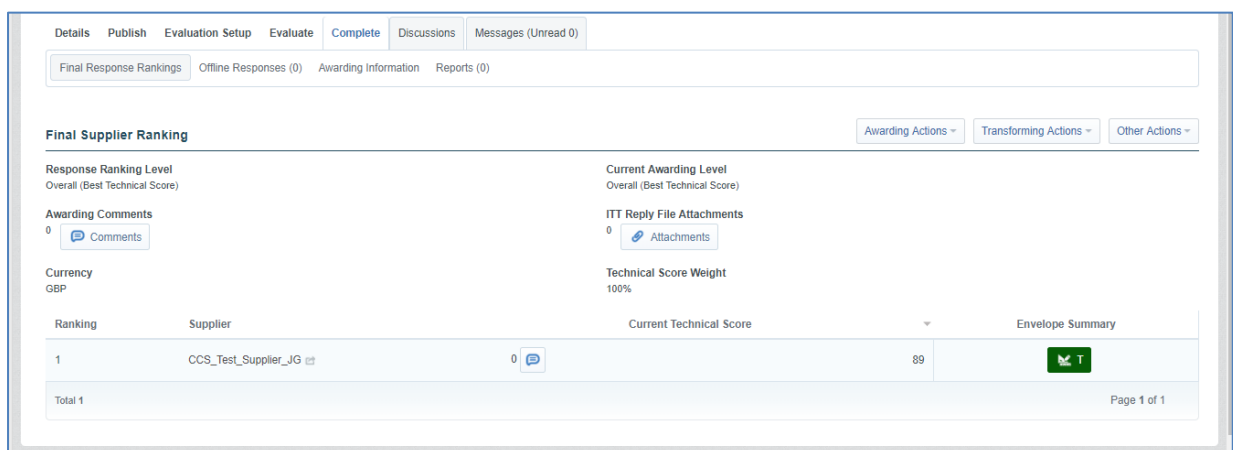
- On this page select, review the scores in the “Current Technical Score” column and only if correct, select [End Technical Evaluation].



- On this page select [Confirm].



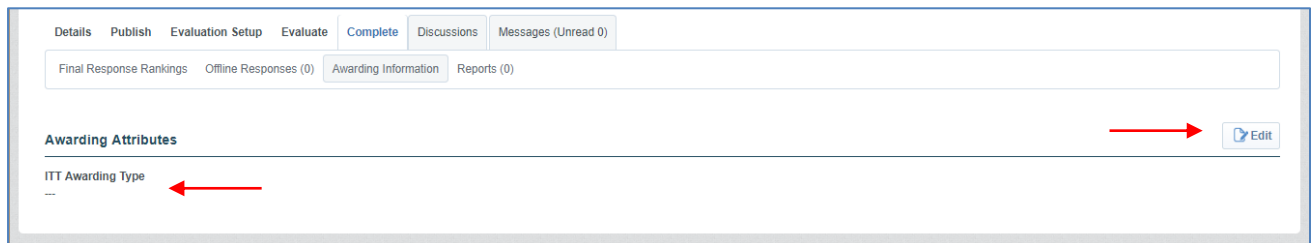
- This action will return you to the “Final Supplier Ranking” page.





## 5.2b Recording the commercial value of the ITT outcome.

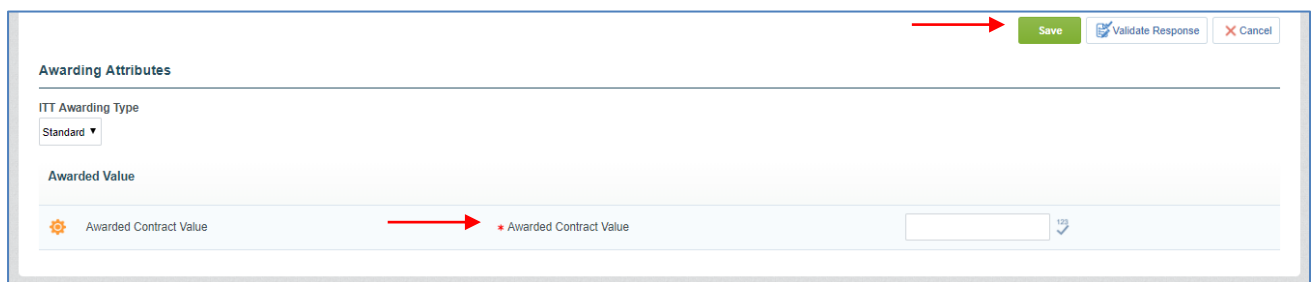
- Login and navigate to the “Complete > Awarding Information” page for the relevant ITT.
- Select [Edit], then select the “ITT awarding Type” as “Standard”, select “OK” to the guidance pop-up message that will appear.



The screenshot shows the 'Awarding Information' page with the 'Complete' tab selected. Under 'Awarding Attributes', the 'ITT Awarding Type' is set to 'Standard'. A red arrow points to the 'Edit' button in the top right corner.

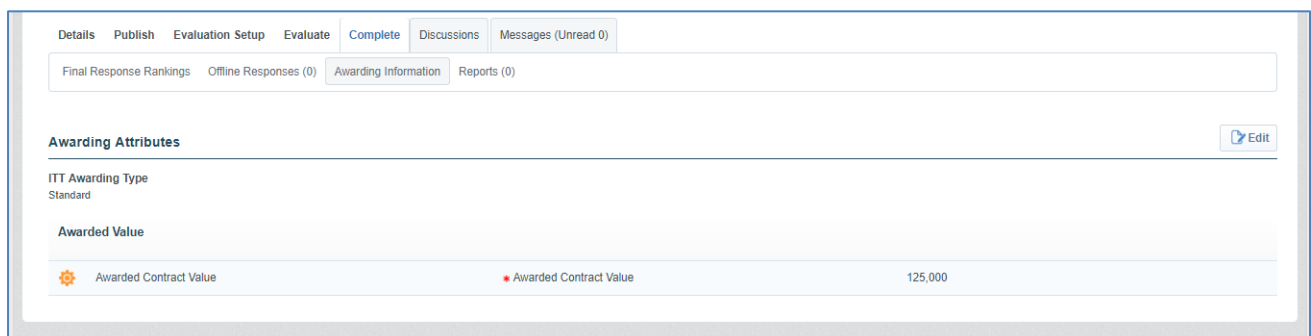
- Enter the value of the ITT in the “Awarded Contract Value” field and select [Save].

Note: the value should be numeric only, without any symbols or punctuation.



The screenshot shows the 'Awarded Value' section with the 'Awarded Contract Value' field highlighted by a red arrow. The 'Save' button in the top right corner is also highlighted by a red arrow.

- This will redisplay the “Awarding Attributes” page with the value saved.



The screenshot shows the 'Awarding Attributes' page after saving. The 'Awarded Contract Value' field now displays '125,000'.

### 5.3c Recording the Award of the ITT (further competition)

Note: This process is intended to enable the generation of management information from the system, buyers should communicate the outcome of the evaluation to the bidders via messaging.

- Login and navigate to the “Complete > Final Response Rankings” page.
- Select “Awarding Actions” and the option “Award”.

Details Publish Evaluation Setup Evaluate Complete Discussions Messages (Unread 0)

Final Response Rankings Offline Responses (0) Awarding Information Reports (0)

**Final Supplier Ranking**

Response Ranking Level  
Overall (Best Technical Score)

Awarding Comments  
0 Comments

Currency  
GBP

Current Awarding Level  
Overall (Best Technical Score)

ITT Reply File Attachments  
0 Attachments

Technical Score Weight  
100%

Awarding Actions - Transforming Actions - Other Actions -

Pre-Award  
Award  
Award to Offline Response  
Manage Supplier Exclusion

Ranking	Supplier	Current Technical Score	Envelope Summary
1	CCS_Test_Supplier_JG	89	
Total 1			

Page 1 of 1

- Select the supplier to whom you are awarding, by “ticking” the associated box and select [Confirm].

The ITT will be awarded to:

Ranking	Supplier	Current Technical Score
1	CCS_Test_Supplier_JG	89

Confirm Preview Alert Cancel

- This action will return you to the “Final Supplier Ranking” page.

Note: The Awarded status and the icon adjacent to the awarded supplier.

ITT: itt\_275 - RM666/L3 Further Competition

Project: project\_142- CCS Widgets Requirement 2019

Closing Date: 09/08/2019 13:45:00

Details Publish Evaluation Setup Evaluate Complete Discussions Messages (Unread 0)

Final Response Rankings Awarding Information Reports (0)

**Final Supplier Ranking**

Response Ranking Level  
Overall (Best Technical Score)

Awarding Comments  
0 Comments

Currency  
GBP

Current Awarding Level  
Overall (Best Technical Score)

ITT Reply File Attachments  
0 Attachments

Technical Score Weight  
100%

Awarding Actions - Transforming Actions -

Ranking	Supplier	Current Technical Score	Envelope Summary
1	CCS_Test_Supplier_JG	89	T
Total 1			

Page 1 of 1

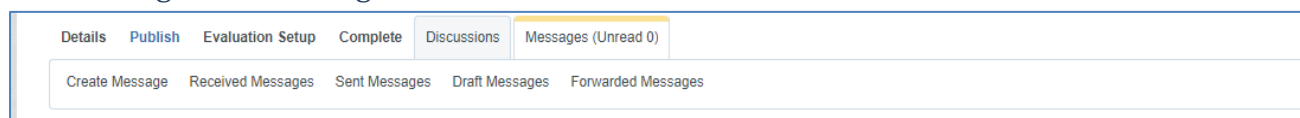
## Section 6. Messaging

### 6.1 Background

Messages may be sent between users of the system from within a specific event (PQQ, ITT etc) or generated automatically by an action within the event (eg the buyer publishing new attachments). Suppliers cannot message other suppliers, they can only message the event's buyers. After creation, your messages can be sent immediately, or saved as a draft for further editing and sending later.

Messages, either those created by a user or those generated by an event activity are notified to you by an email alert to your registered email address. User created emails do not contain the text of the associated message, they contain a link to the message held within the system, in this way the sender can be provided with confirmation of the reading of the message by the recipient (See "Sent Messages" below).

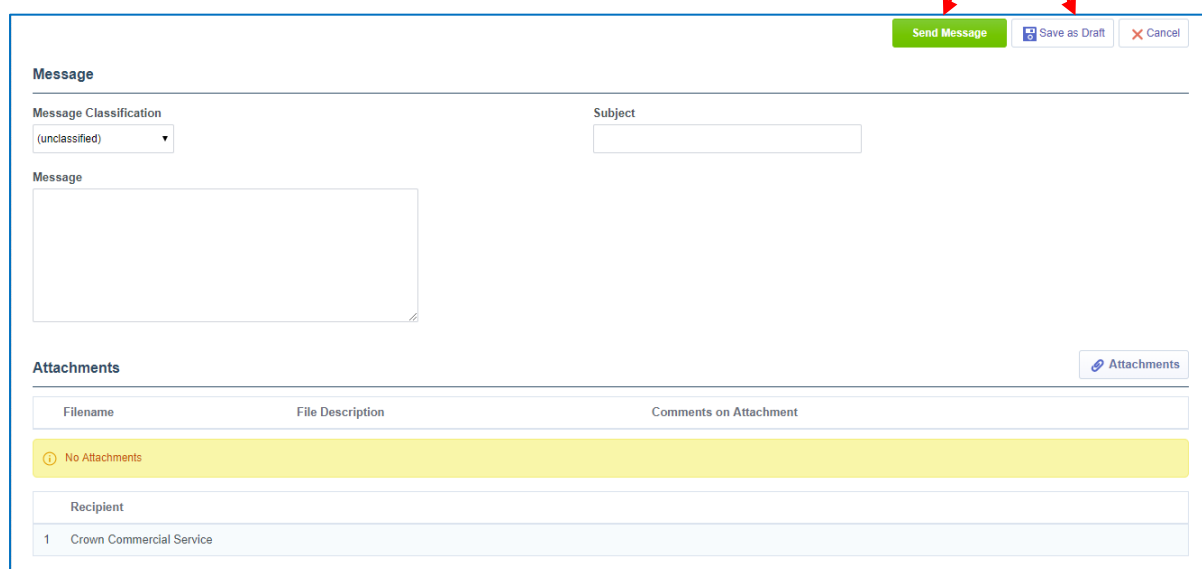
### 6.2 Creating a New Message



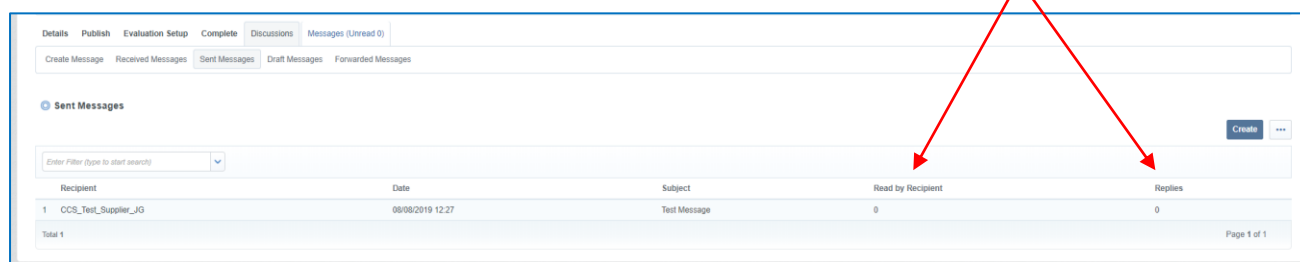
Within the related event, select "Messages > Create Message"

Populate the various message fields and select either:

- the [Save as Draft] button if you wish to edit the message and sent later, draft messages can be located at "Messages > Draft Messages" or;
- the [Send Message] button to send the message immediately.



After sending, your messages will be listed in “Messages > Sent Messages” with confirmation of whether they have been read by the recipient and whether there’s been a reply to your message.

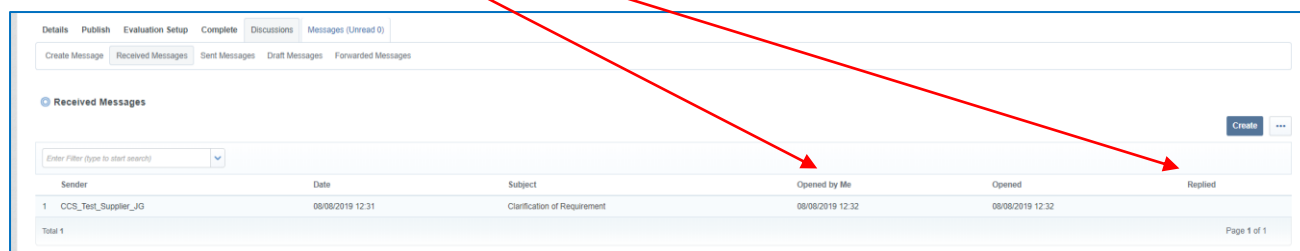


Recipient	Date	Subject	Read by Recipient	Replies
1 CCS_Test_Supplier_JG	08/08/2019 12:27	Test Message	0	0
Total 1				

### 6.3 Received Messages

A message sent to you will be notified by an email alert to your registered email address. The content of a user created message can be read by following the link in the email alert to “Messages > Received Messages” within the system, you will need to log in as part of following the link.

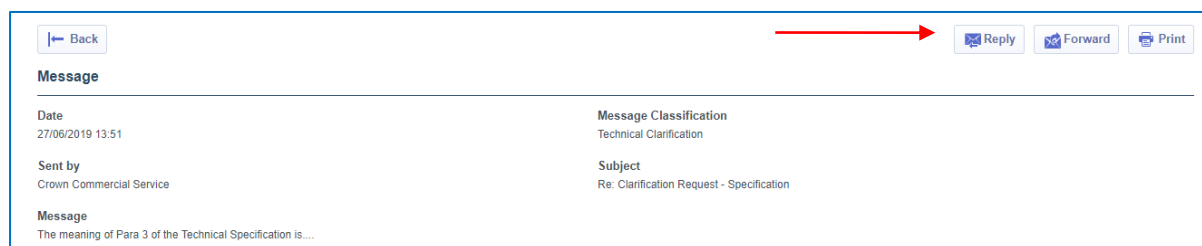
The page will list your “Received Messages” and indicate when they were opened by you (Opened by Me) or one of your colleagues also in the event (Opened) and whether you have replied to the message (Replied).



Sender	Date	Subject	Opened by Me	Opened	Replied
1 CCS_Test_Supplier_JG	08/08/2019 12:31	Clarification of Requirement	08/08/2019 12:32	08/08/2019 12:32	
Total 1					

Selecting the message “Subject” will open the message contents. With the message opened, you will be able to [Reply] to the message or [Print].

It is possible to [Forward] the email to an email address outside the system; however, if this option is selected the message text will leave the security of the Sourcing system and it will not be possible for the new recipient to reply directly to you as the email is sent out from an unmonitored system mailbox.



Back
Reply
Forward
Print

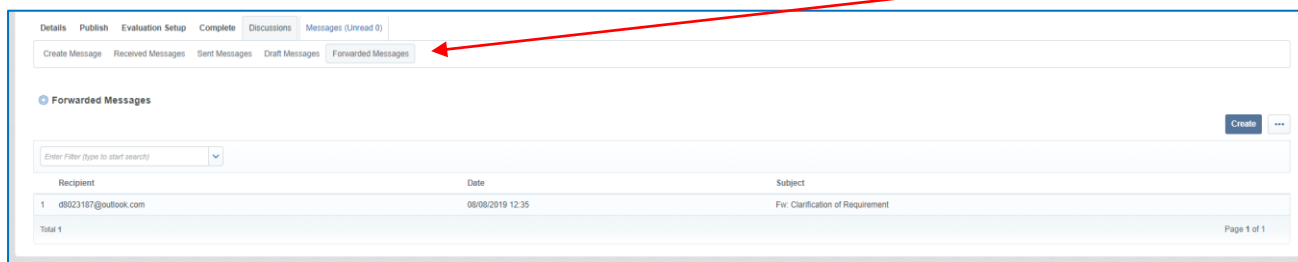
---

**Message**

<b>Date</b> 27/06/2019 13:51  <b>Sent by</b> Crown Commercial Service  <b>Message</b> The meaning of Para 3 of the Technical Specification is...	<b>Message Classification</b> Technical Clarification  <b>Subject</b> Re: Clarification Request - Specification
---	---

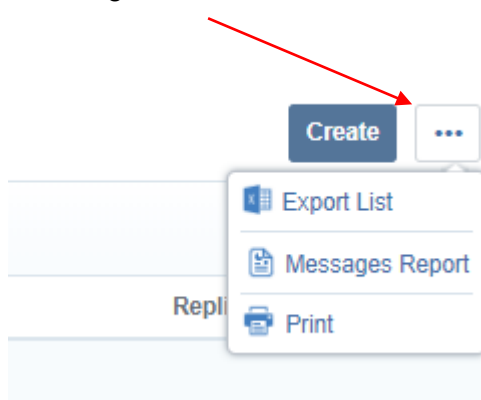
## 6.4 Forwarded Messages

Messages that have been “Forwarded” will be listed under “Messages > Forwarded Messages”.



## 6.5 Message Libraries

Where there are large numbers of Received Messages (Sent Messages, or Draft Messages, or Forwarded Messages) in an event it may be helpful to use the additional functionality available by selecting the “...” and one the of the displayed sub-options.



- Export List – this will export the contents of the selected library into an Excel workbook as below:

	A	B	C	D	E	F	G	H	I
1	Received Messages								
2									
3	Sender	Date	Subject	Message	Opened by Me	Opened	Replied	Attachments	Message Classification
4	CCS_Test_Supplier_JG	08/08/2019 12:31	Clarification of Requirement	Please can you clarify...	08/08/2019 12:32	08/08/2019 12:32	-		0 General Clarification
5									
6									

- Messages Report – this will send the contents of the selected library to a printer as a formatted report.
- Print – this will send the contents of the currently displayed page of the selected library to a printer as a formatted report.