Crown Commercial Service

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

Contents

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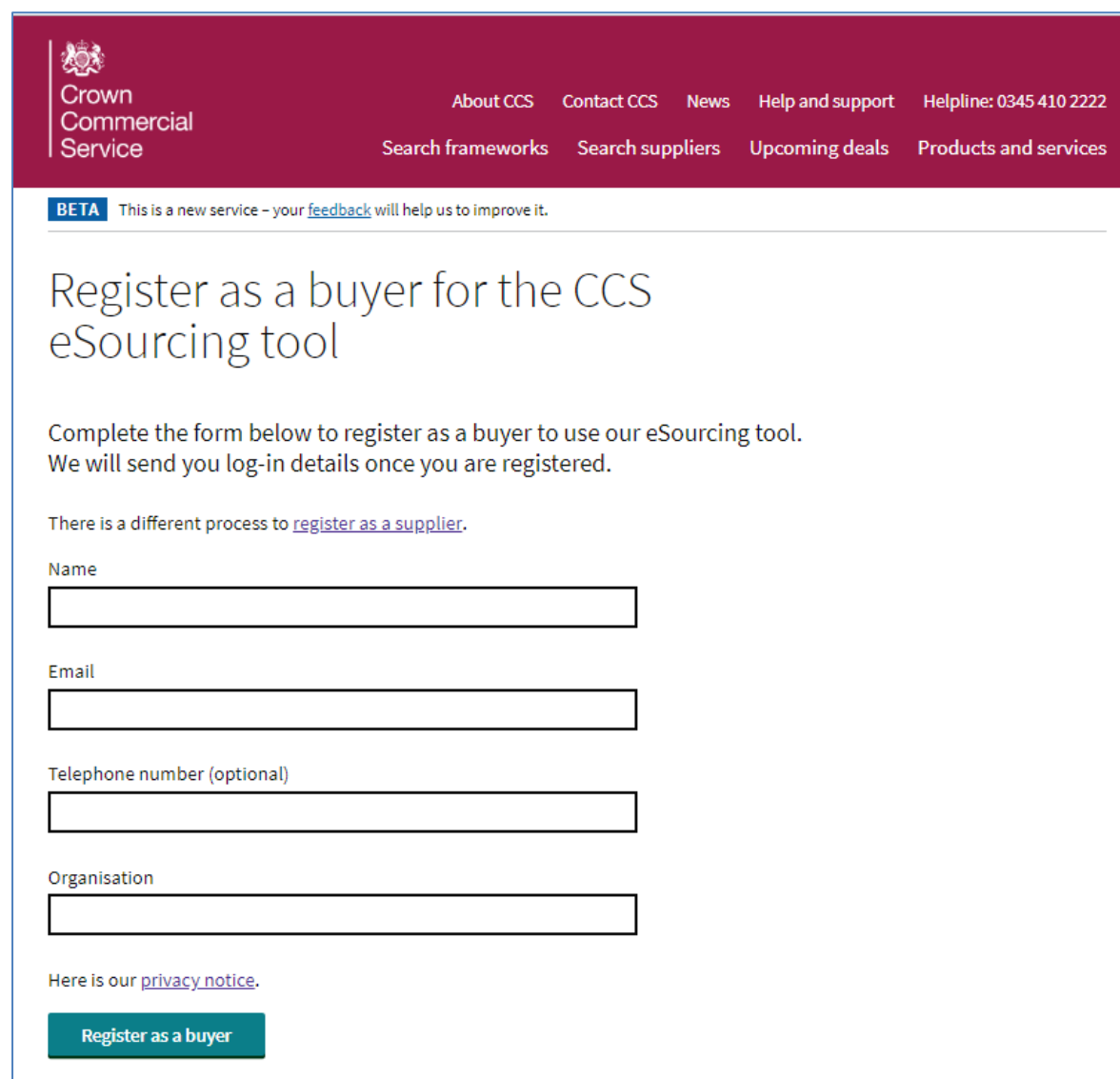
Where these commercial agreements can be used to meet a public sector requirement by running a further competition (call-off), CCS makes its eSourcing System available free of charge to those buyers. Access is not provided to public sector organisations to conduct further competitions from non-CCS commercial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

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.
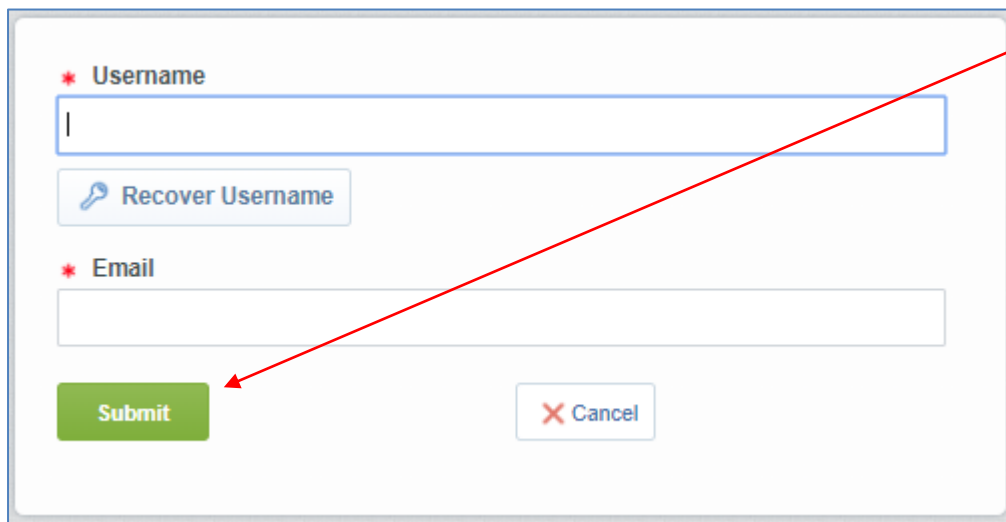
1.3 How to reset your Password
On the Login Page select "I cannot access my account".
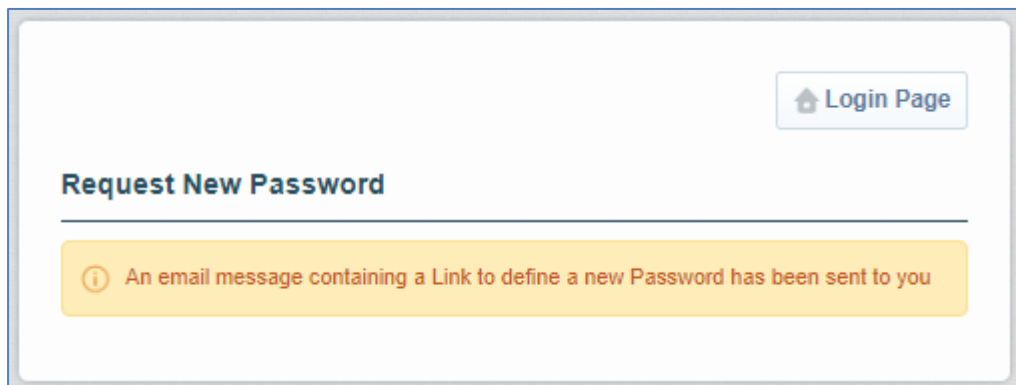
- On the next page, enter your username and registered email address, then select [Submit].

- Success will be indicated by the following message.
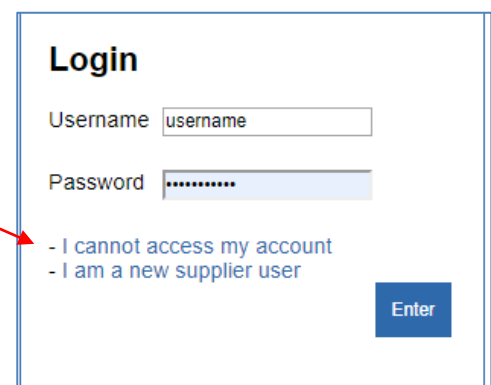
- On receipt of the email, follow the instructions to reset your password.
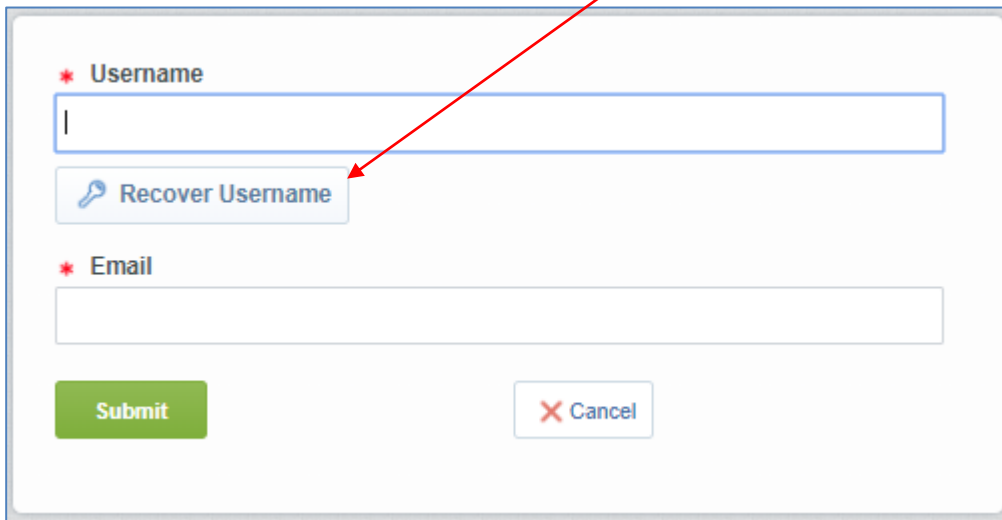
1.4 How to recover your Username

On the Login Page select "I cannot access my account".
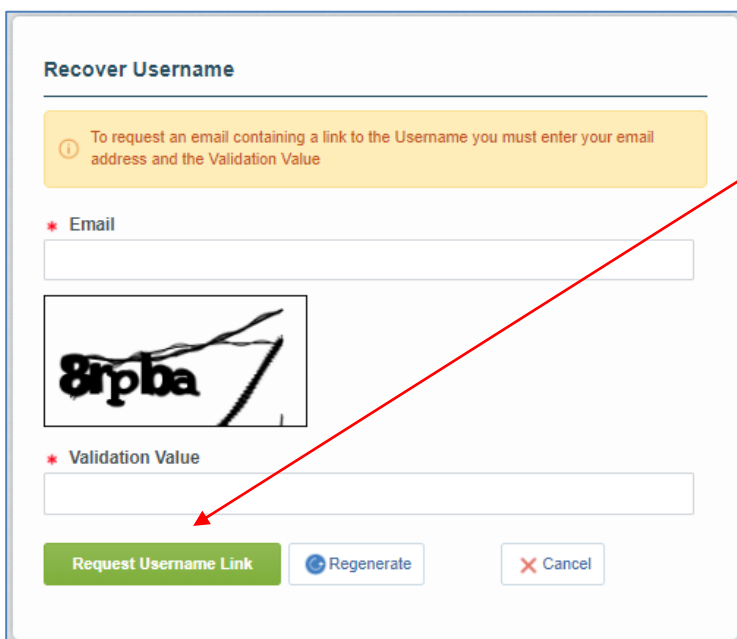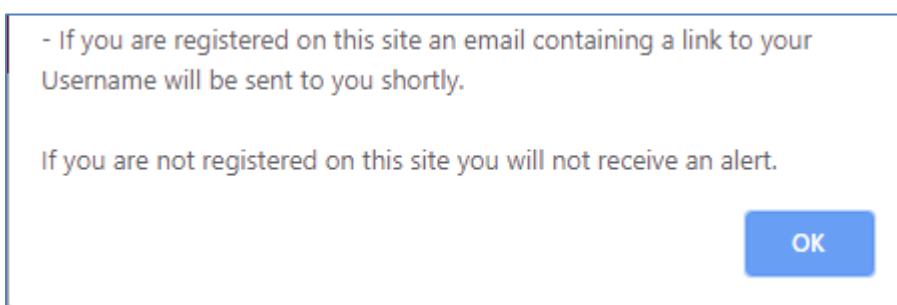
- On the next page, select "Recover Username".

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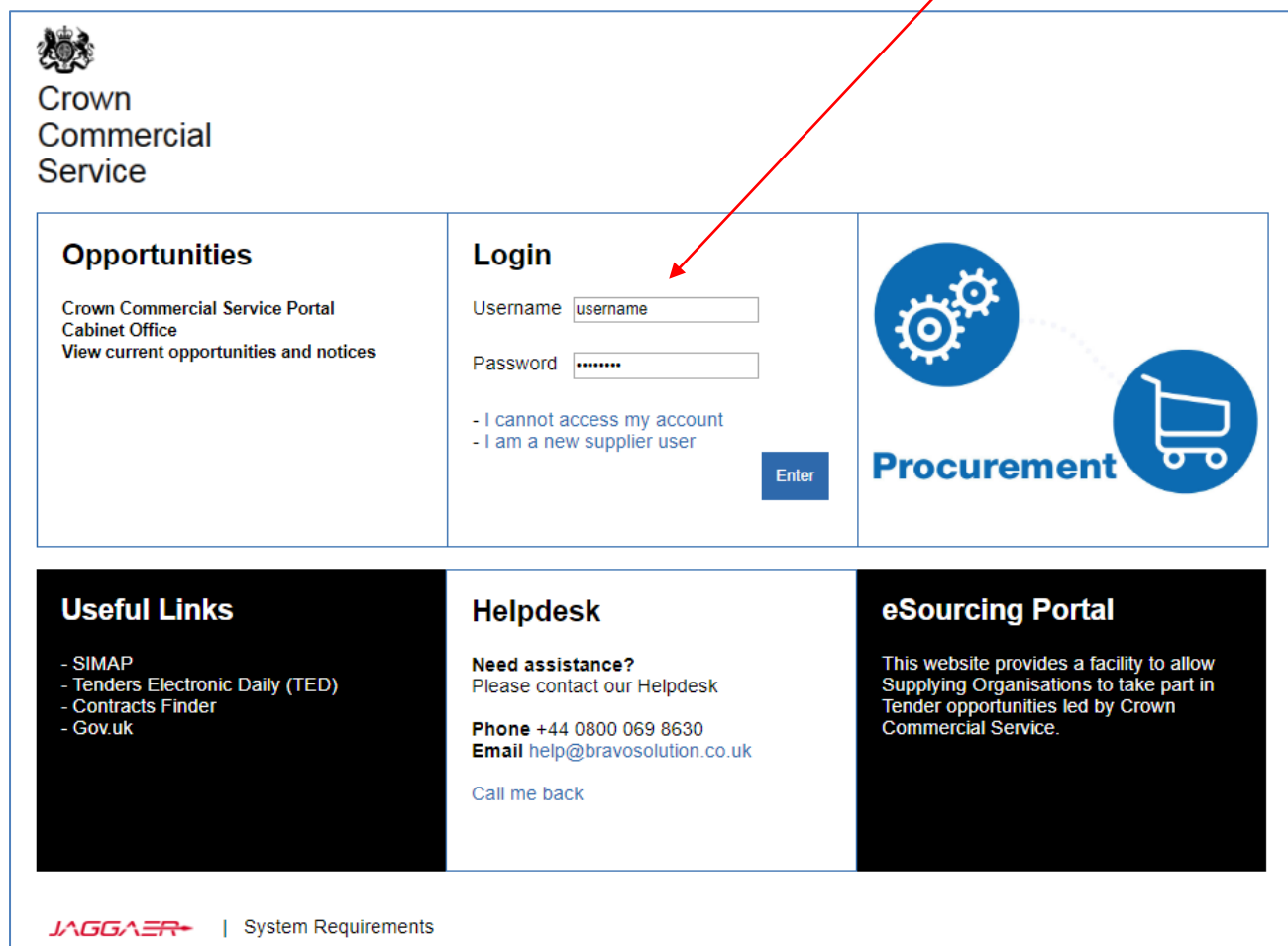
- On receipt of the email, follow the instructions to recover your Username.

Section 2. Accessing the eSourcing System

2.1 Accessing the Sourcing System
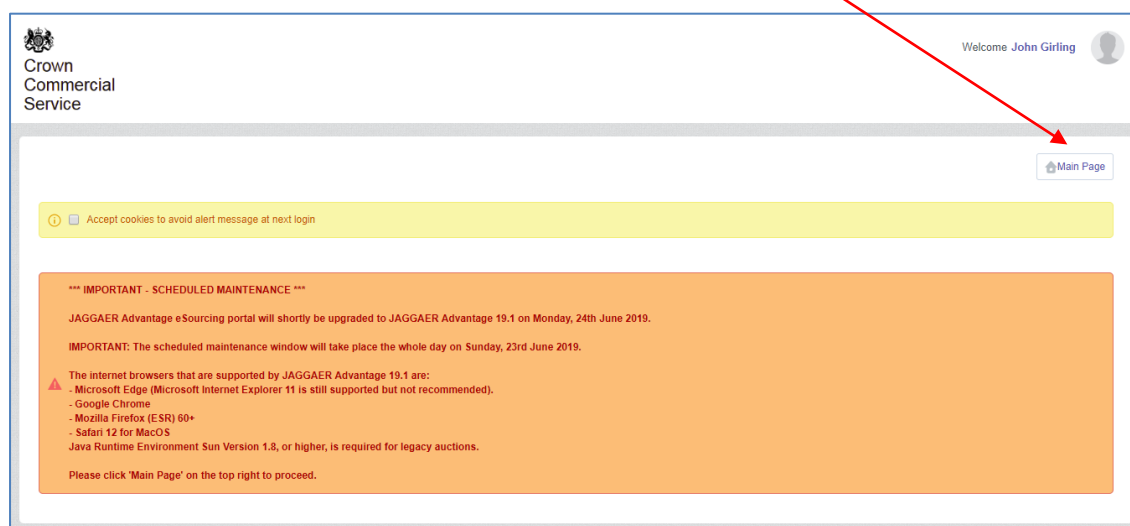
Navigate to the Login Page at: https://crowncommercialservice.bravosolution.co.uk

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

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 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.

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.

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).

If you wish to communicate with the Suppliers participating in this event you must use the messaging facility as described in Section 6.
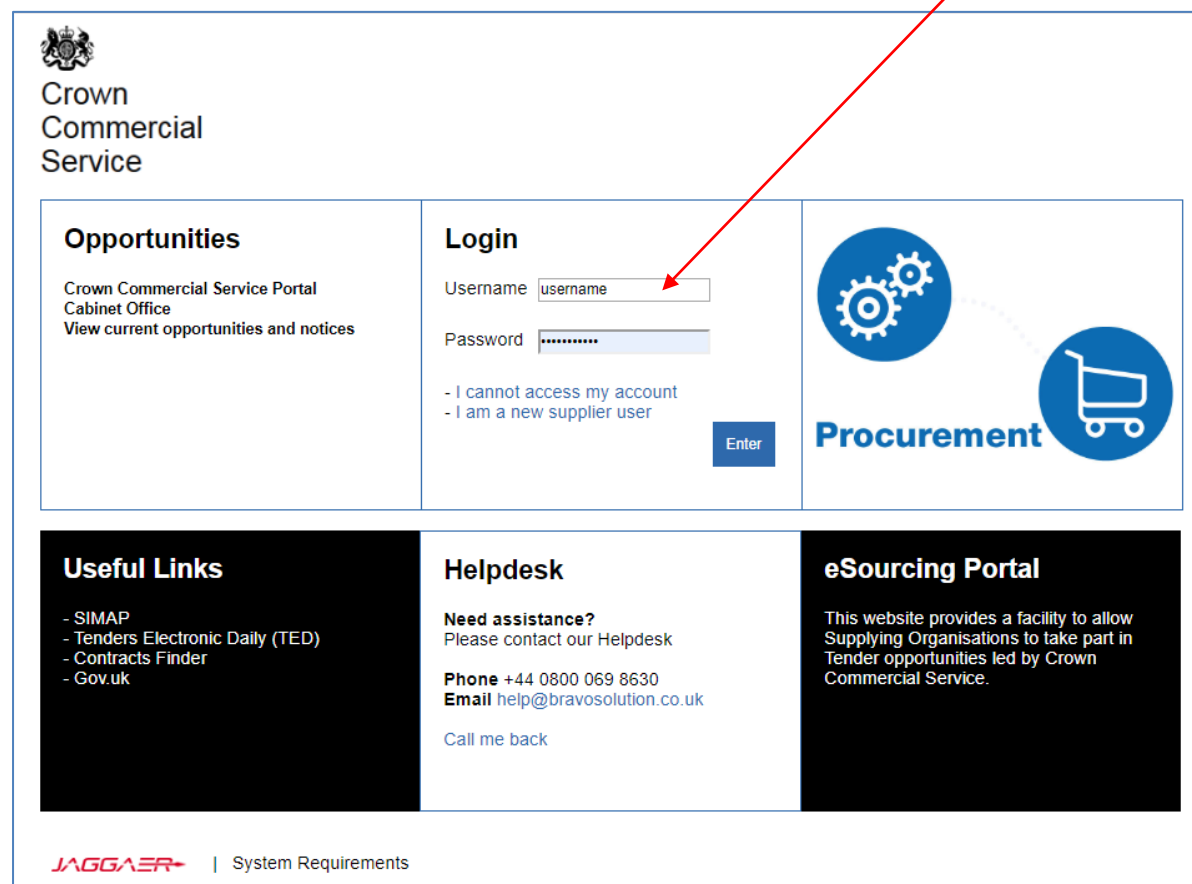
Section 3 Creating a new Further Competition Event (Project and ITT)

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].

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

The "Invitations To Tenders (ITTs)" Page lists the ITTs to which you currently have access.
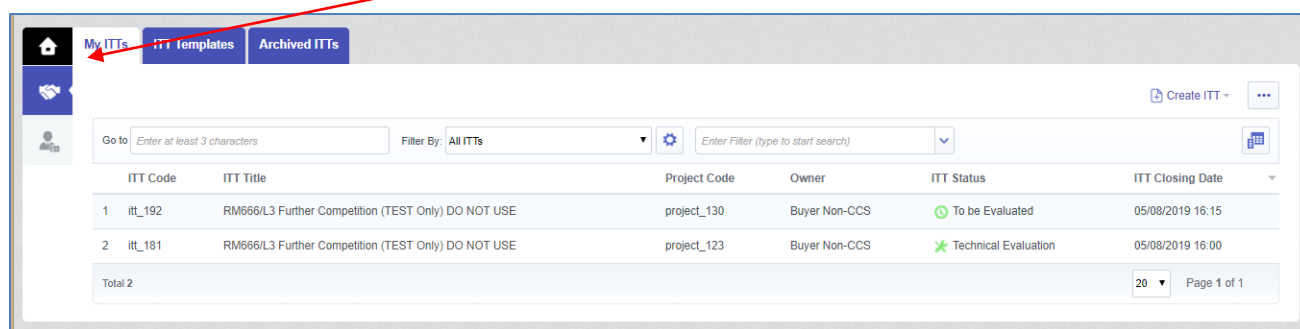
3.3 Creating your Project and ITT (further competition)

- Select "Sourcing > Projects > My Projects" from the side menu.
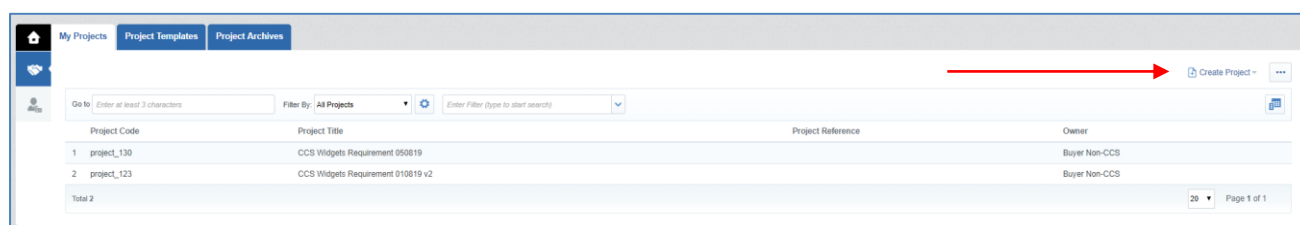
- On the "My Projects" Page, select "Create Project" and the option "From Template".

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].
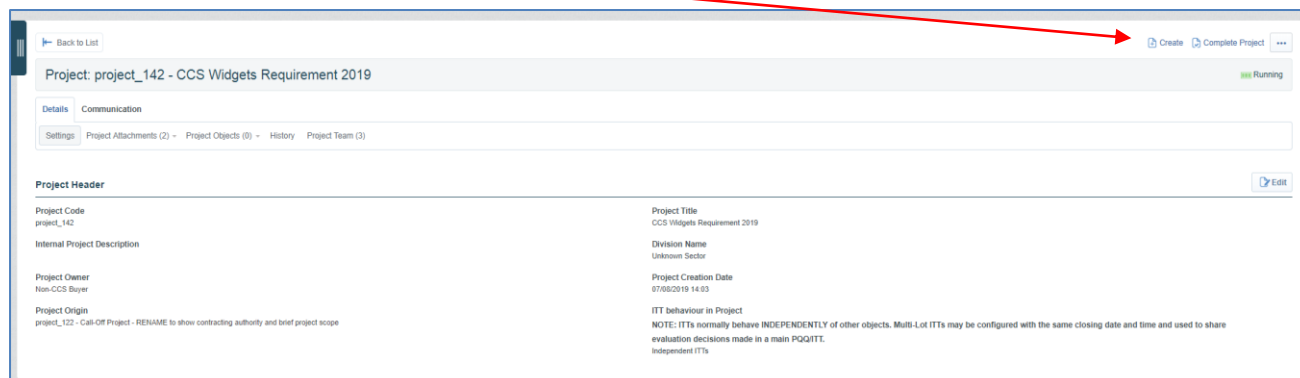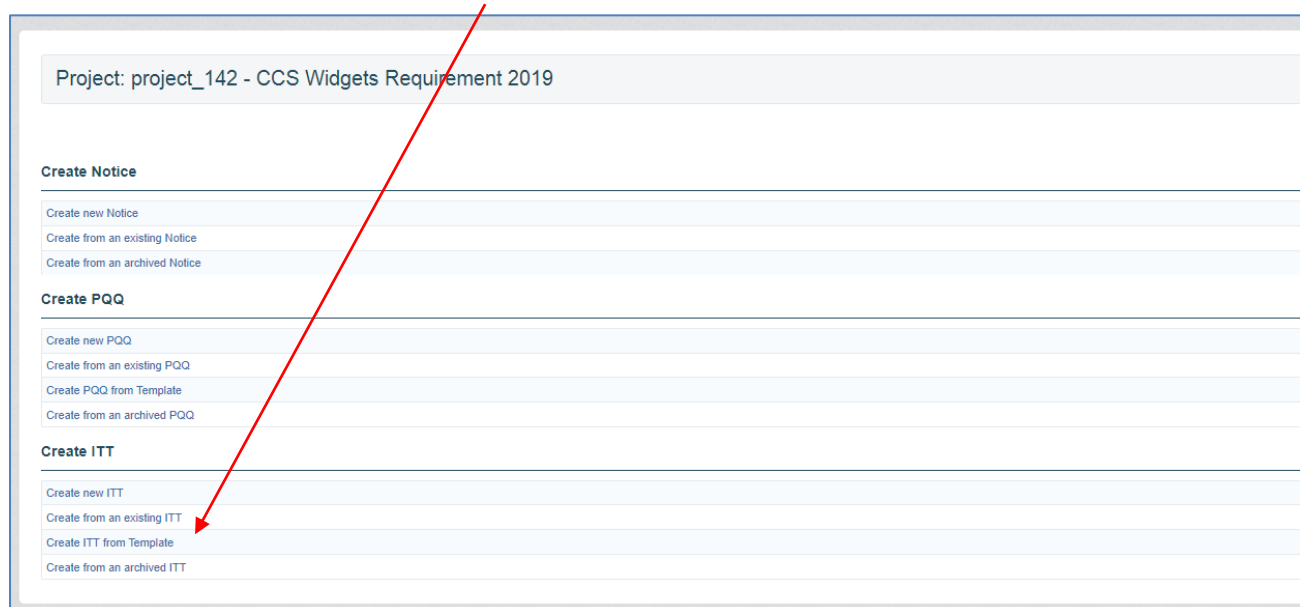
- On the following page, select [Save].

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"

The project is a "container" in which the ITT (further competition) can now be created.
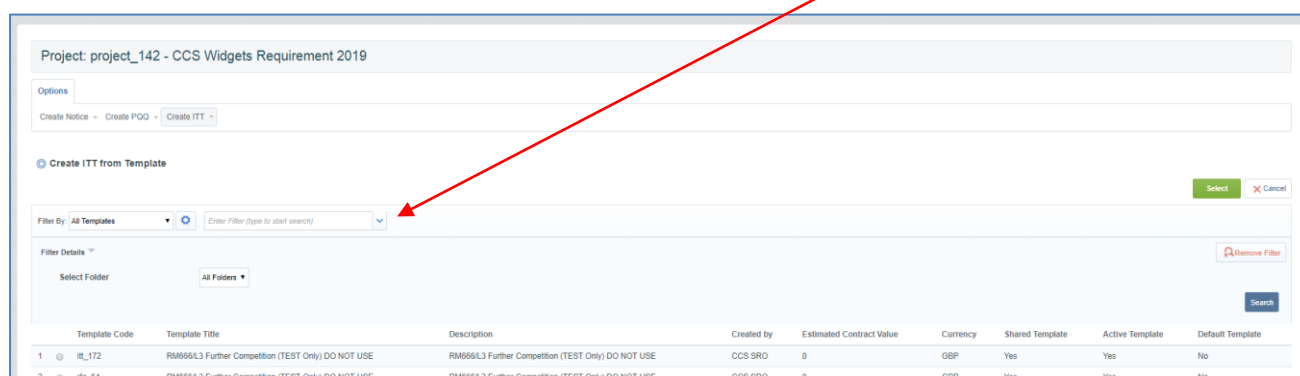
- Select "Create"

- On this page, select "Create ITT from Template".

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

- 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.

- 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].

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.

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.

- On this page select [Upload New File].

- 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.

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

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

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.
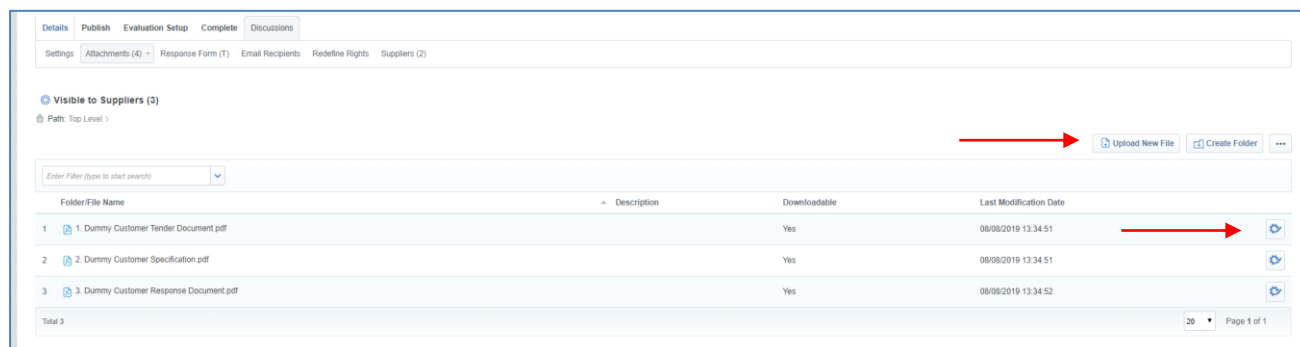
- On this File Details page, select the "…" and "Delete File" option.

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".

- Select "Project Team".

- Select [+Add].

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

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

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

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.

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

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.

NOTE 1: If here 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
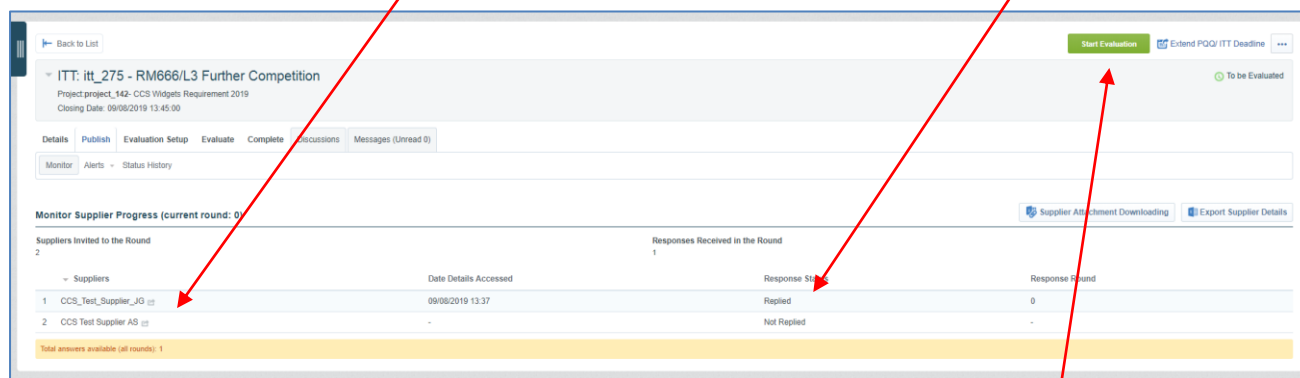
When the deadline, you entered at publication, is reached the ITT will automatically close. This will prevent suppliers submitting any further responses or revising an existing response. You need not take any action at this time.

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.

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.

- 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".

- 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.

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

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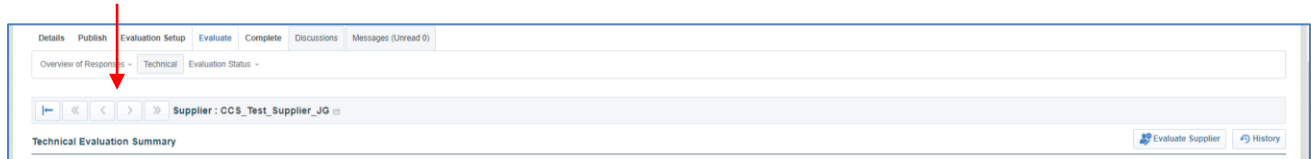
4.4 Offline Evaluation

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.

- Select [Edit Score].

- 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.

- 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.

- On completion of entering the % scores, return to the "Technical Envelope Evaluation Status" page by selecting this button.
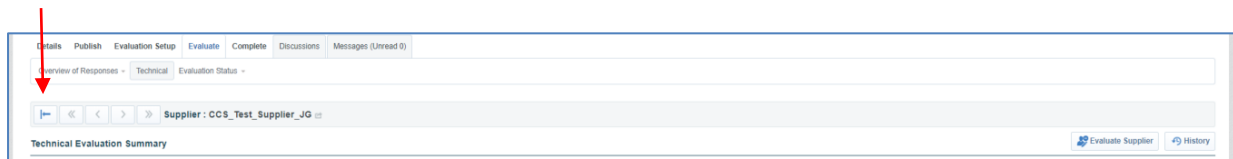
- On this page select, review the scores in the "Current Technical Score" column and only if correct, select [End Technical Evaluation].
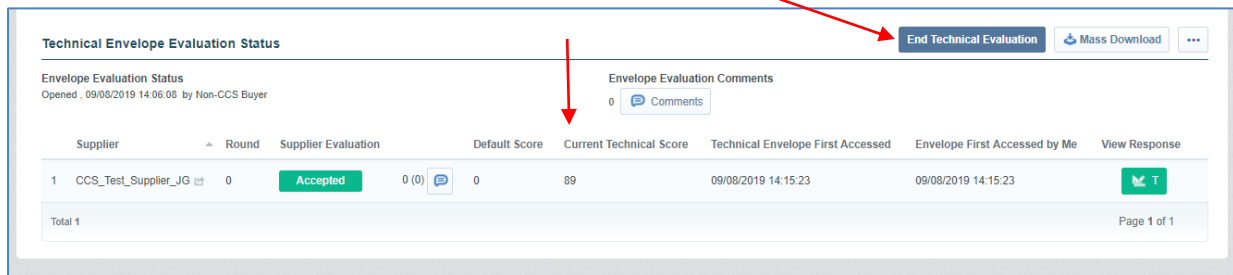
- On this page select [Confirm].
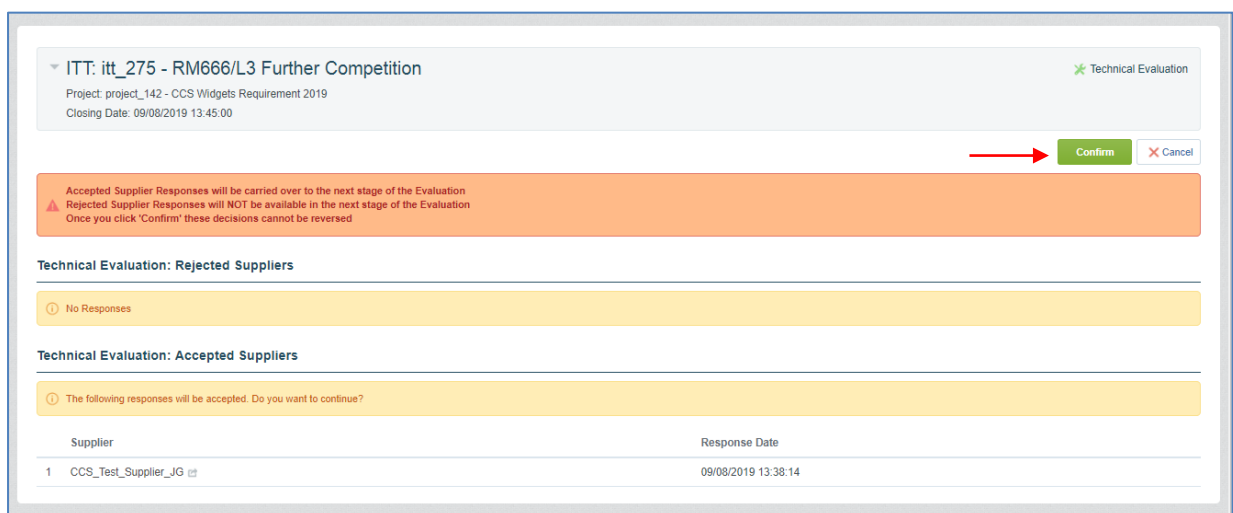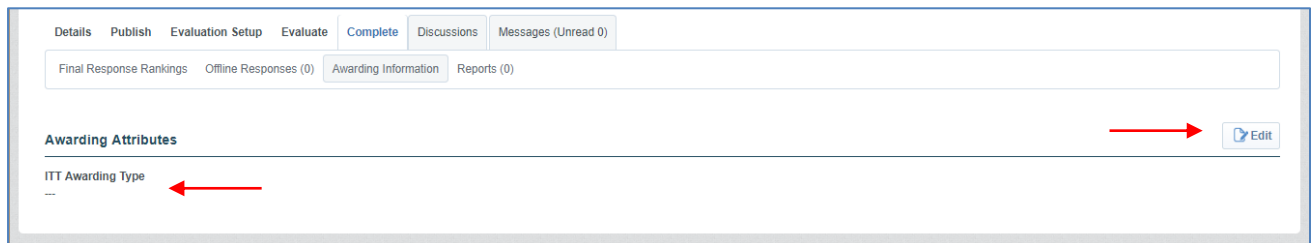
- This action will return you to the "Final Supplier Ranking" page.
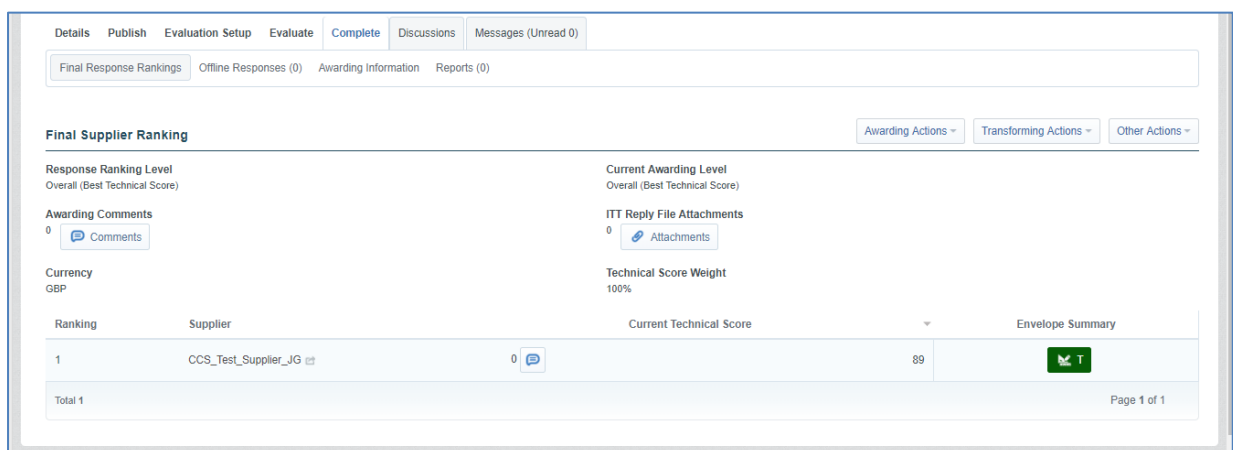
5.2b Recording the commercial value of the ITT outcome.
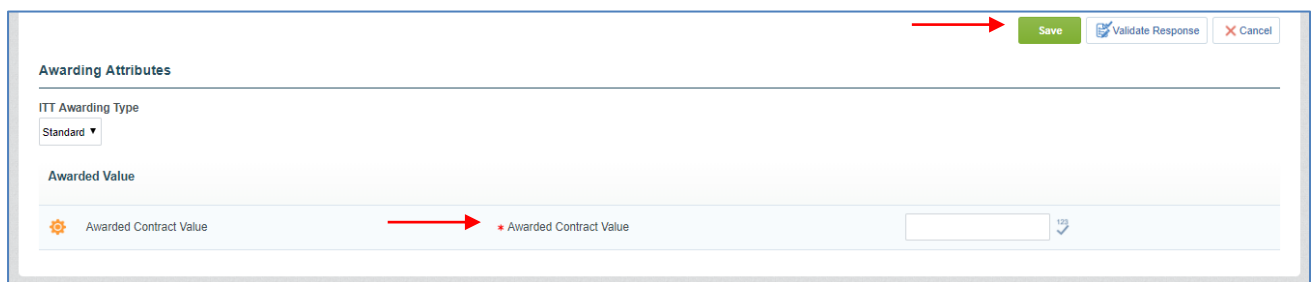
- Login and navigate to the "Complete > Awarding Information" page for the relevant ITT.
- Select [Edit], then select the "ITT awarding Type" as "Standard", select "OK" to the guidance pop-up message that will appear.
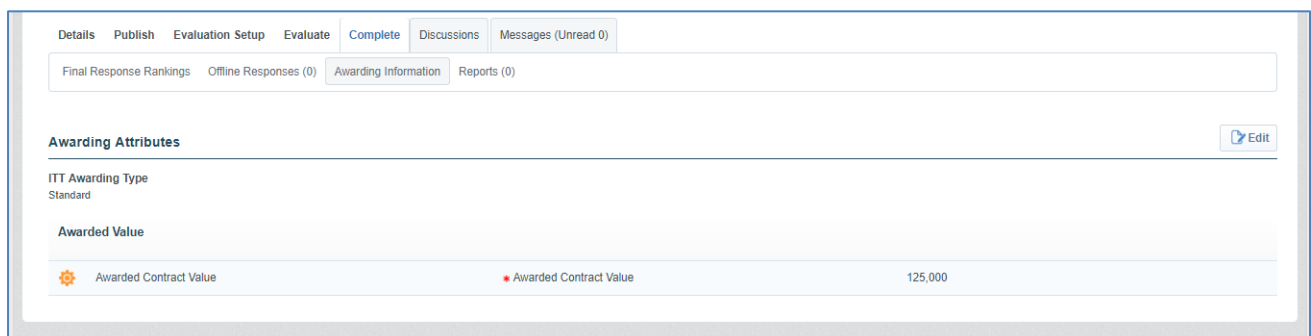
- Enter the value of the ITT in the "Awarded Contract Value" field and select [Save].

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

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

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".

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

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

Note: The Awarded status and the icon adjacent to the awarded supplier.
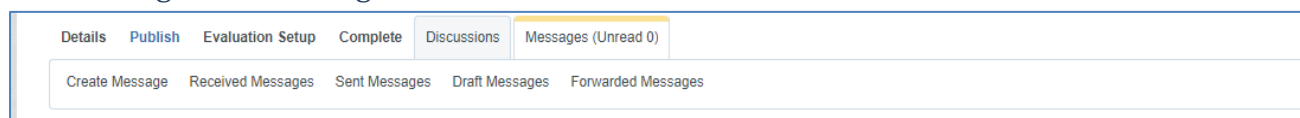
Section 6. Messaging

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).
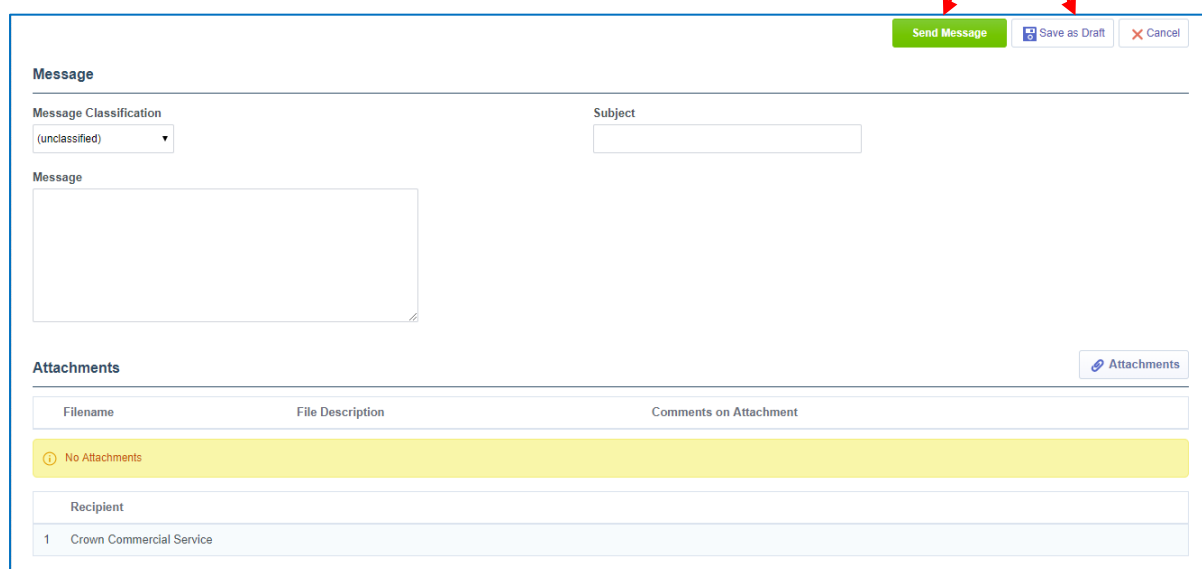
6.2 Creating a New Message

Details	Publish	Evaluation Setup	Complete	Discussions	Messages (Unread 0)

Create Message   Received Messages   Sent Messages   Draft Messages   Forwarded Messages
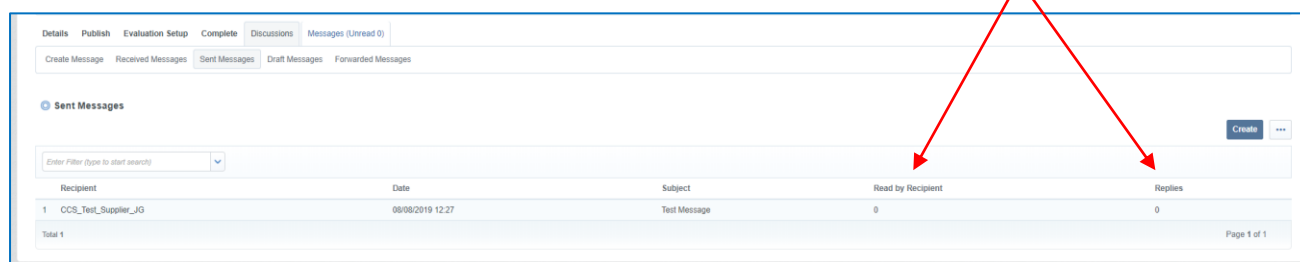
Within the related event, select "Messages > Create Message"

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.

Message

Message Classification	Subject
(unclassified)	

Message

Attachments

Filename	File Description	Comments on Attachment
No Attachments		

	Recipient
1	Crown Commercial Service

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.

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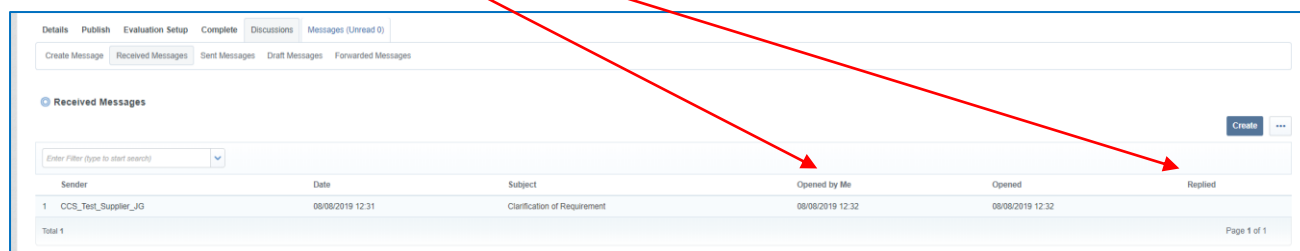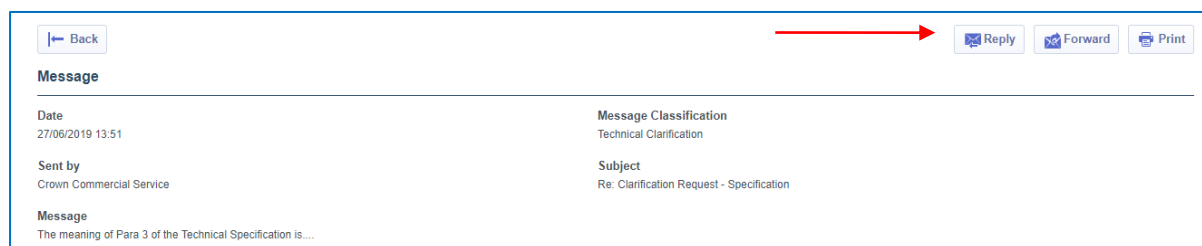
The page will list your "Received Messages" and indicate when they were opened by you (Opened by Me) or one of your colleagues also in the event (Opened) and whether you have replied to the message (Replied).

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.

6.4 Forwarded Messages
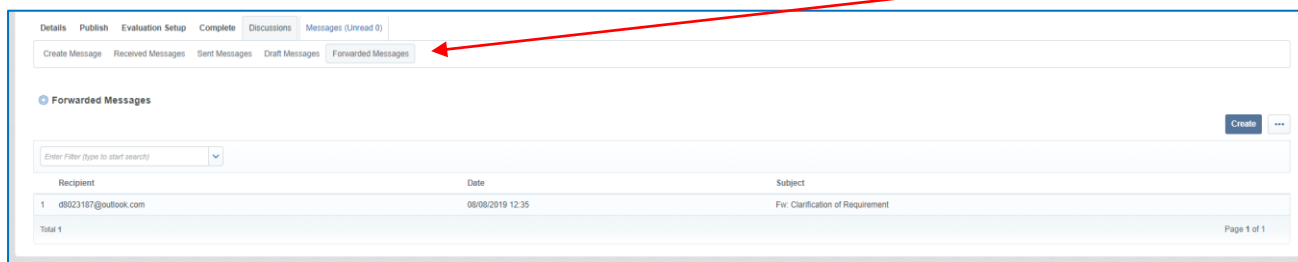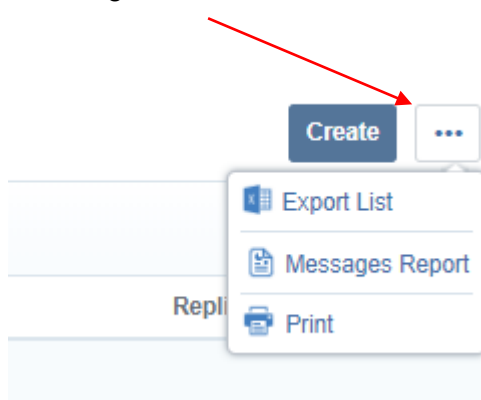
Messages that have been "Forwarded" will be listed under "Messages > Forwarded Messages".

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:

- 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.