

Customer How do I ...?

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Amend My User Profile

- Log in to Emptoris
- Click on 'Utilities' tab
- Click on 'Admin' tab
- Click 'My Profile' tab
- Amend details as necessary
- Click 'Save'
- You can also click on 'My Password' to change password or amend your secret question. Click 'Save'

Send a Message

- Log in to Emptoris
- Click on the RFX you want to send a message through
- Click on the 'RFX Messages' link with the envelope icon towards the top left of the screen
- Click on 'Create' button – you may have to maximise the window to see this button
- Click on the recipient you wish the mail to go to, so that it is highlighted in blue. You may have to maximise this window to see the scroll-bar which allows you to see all the potential recipients. (Clicking on 'All Bidders' will send the message to all the suppliers on this event)
- Complete the subject field
- Enter your message
- If you wish to add an attachment, click on 'Attachments'
- New field will open
- Click on 'Add' button
- Give the attachment a name using 'name field'
- Choose 'Local Drives' in location drop down box
- Click 'Browse' button then double click on required folder
- 'Save' and 'Close'
- Click on 'Send' in the 'Create Message window'

Export a Document

- Log in to Emptoris
- Click on to your RFX
- Make sure you are on the 'Edit' tab
- Click on 'Attachment' tab (in left hand column)
- Scroll to the right of the screen
- Select the check-box next to the relevant document/s you wish to export
- Click on 'Export' tab
- New pop-up window will open
- Click 'Export'
- 'Data Manager' window will open & download will be 'running'. You can refresh the screen using the four-arrowed icon button
- Item will then show as 'Done – Click here to download results'
- Click on the 'Done' and then 'Save'

View Pricing Rate Cards

- Log in to Emptoris
- Click 'RFX' tab
- Click on 'Manage RFX' option
- Select the 'Templates' tab
- Click on required RFX in the 'RFX Name' column (you may need to scroll through the pages to find the one you need)
- Click on RFX 'Attachments' tab (to view)
- Click tick box of required document, i.e. 'Supplier Rates'
- Click 'Export'
- 'Data Manager' field will appear. When complete the status will show as 'Done- click here to download results'. If it is taking a long time you can click the button with the four arrows to refresh
- Click to download
- 'File download' box will appear
- Click 'Save'

Check Which Suppliers Are on a Framework (Using eSourcing System)

- Log in to Emptoris
- Click 'RFX' tab
- Click on 'Manage RFX' option
- Ensure you are within the 'Templates' tab
- Find the template you need by going through the pages
- Click on required RFX in the 'Template Name' column
- Click on 'Edit' tab
- Click on 'Invite Suppliers' tab (in left hand column)
- List of supplier linked to this framework will now appear

Get a Framework Supplier's Contact Details (Using eSourcing System)

- Log in to Emptoris
- Click 'RFX' tab
- Click on 'Manage RFX' option
- Ensure you are within the 'Templates' tab
- Find the template you need by going through the pages
- Click on required RFX in the 'Template Name' column
- Click on 'Summary' in the left hand column
- Click on 'View Details' (or 'Item Print Preview' if 'View Details' is not there)
- Scroll to bottom of the window and all the supplier's contact details should be visible

Create an RFX

- Go to <http://ccs-agreements.cabinetoffice.gov.uk/> and use the Search box to find the correct framework and lot for your requirements
- Log in to Emptoris
- Click 'RFX' tab, then 'Manage RFXs'
- Click on 'Templates' tab and search for the template you need by going through the pages. If you hover your cursor over the page number, it will show you the details of the first template on that page.
- When you have found your framework, click in the checkbox on the right hand side of the screen and then click on 'Create From Template'
- Click 'OK' when prompted
- Fill in the fields marked with a red asterisk
- Click 'Save'
- The next page should have a grey column on the left hand side with a series of menu tabs. The 'Schedule' tab should be in dark bold and not greyed out
- To add your specification document as attachments, click on 'attachments'
- Click on 'Add'
- Enter the name of specification document in the name field
- Click on 'Browse' and select the document you wish to upload
- Click 'Save' and 'Close'
- Click on 'Schedule' on left-hand menu
- Enter the opening date and time
- Enter the closing date and time
- Ensure the radio button next to 'automatically invite suppliers' is selected
- Click 'Save'
- If the event needs to be opened immediately, Click on 'Schedule', enter the closing date and time and click 'Open Now'. Click 'Save'
- *Suppliers will receive a notification to inform them of a new opportunity*

Add a Team Member to an RFX

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- Log in to Emptoris
- Click into your RFX
- Click on 'Edit' tab
- Click on 'Define Team' tab in the column on the left of the screen
- Click 'Add Team Members' tab
- Click on the magnifying glass icon to search
- Enter the surname of your team member in the 'search' box
- Click on the tick box at the right of the screen alongside the team member's name - then click 'Add Team Members' tab again
- Click 'OK'
- *User will receive a system notification email advising them of the action*

Give a Team Member a Different Role in an RFX

- Log in to Emptoris
- Click into your RFX
- Click on 'Edit' tab
- Click on 'Assign Team' tab in the column on the left of the screen
- Highlight the letter that indicates the current role of your colleague in the 'Role' column
- Enter one of the following to change the role of your colleague
 - 'L' - Lead/Host
 - 'M' - Member/Co-Host
 - 'O' - Observer
 - 'Q' - Scoring Observer
 - 'S' - Scoring Member
- Click 'Save'
- User will receive a system notification email advising them of the action

Open an Event When the Schedule Button Is Greyed Out

- If the schedule button is greyed out you will need to set up a new RFX event
- The button is greyed when the correct process for creating an RFX has not been followed
- Refer to the guide 'How to create an RFX' ensuring that you click on 'Create From Template' in the early stages

Run an Evaluation on a Further Competition

- Evaluation on a Further Competition is done outside the eSourcing system in accordance with your organisation's own procedures policies and processes.

Run an Evaluation (OJEU)

- Assign evaluators to the RFX. Within the RFX go to 'Define Team', 'Add Team Member', select the team member you wish to add by searching and then ticking in the check-box at the far right, 'Add Team Member'.
- Then click on 'Assign Team' and make your evaluators "Scoring Observers" by highlighting their current role letter and replacing with "Q"
- Assign evaluators to the specific Questionnaire(s) they will be evaluating. Within RFX go to 'Define Team', and click on the link in the 'Invitation Type' column alongside their name and follow the on-screen instructions
- Evaluators perform their evaluation
- When the evaluators have performed their evaluations, their access to Questionnaires must be withdrawn. Within RFX go to Define Team, and click on the link in the Invitation Type column alongside their name and follow the on-screen instructions
- Export all the evaluator scores and comments in preparation for a moderation session. Go to 'Score sheet', 'Export'
- Conduct the moderation session(s)
- Enter the moderated scores and comments as a "named" moderator/evaluator (not by overwriting the 'Average Score'), using online questions (or via an offline score sheet) in the name of a moderator/evaluator
- Export the "named" moderator/evaluator scores to provide an audit record. (Creates an offline score sheet (using 'Score sheet' > 'Export')). Upload this file to RFX attachments ('Internal Only' folder)
- Configure the Questionnaire and Question weightings (for the required Lot if applicable) using Weight Questionnaires and Weight Questions.
- Execute RFP report and extract the weighted scores for the "named" moderator/evaluator. Data is shown in the "named" moderator/evaluator weighted column of RFP Report > Supplier Summary Section.

Close and Re-Open an Event

- Log in to Emptoris
- Click in to your RFX
- Send a message to 'All Bidders' to advise them that the event you are hosting will be closing temporarily. If possible give an idea of how long the event will be closed for and the general reason for the temporary closure.
- Click on 'Schedule' tab
- Click 'Close Now'
- When you are ready to reopen the event, you can adjust the close time and date of the event if appropriate to take into account the time the event has been closed – again to do this click on the 'Schedule' tab and adjust the close time details
- When you are ready click 'Open Now'
- Although notifications should be sent by the system to the suppliers, it is courteous to send RFX messages to 'All Bidders' to advise them that the event has been reopened

Award in eSourcing System

- *To complete the following process fully, you are reliant on the suppliers having completed all parts of their responses in full, including some non-mandatory questions. Therefore you may not always be able to award online.*
- *If this is the case, you should complete your evaluation offline as normal, upload your evaluation documents into an 'INTERNAL ONLY' folder of the attachments area of the event (to ensure that suppliers are not able to view it), and send out messages to the suppliers using the RFX messaging facility within the RFX to advise them of their success or otherwise.*
- Perform your evaluation offline in accordance with your own guidelines
- Log in to Emptoris
- Click RFX > Manage RFX
- Select the event
- Select the 'Score sheet' tab
- To select a supplier, add their evaluation score and add the winning status etc., select the top green box under the supplier's name
- A new window will appear – insert the score and note if this is the winning bidder
- Repeat this process for the non-winning suppliers by using the 'RESPONDING SUPPLIER' button
- Attach the evaluation scoring to the event by selecting the attachments label. This opens another window where you attach the evaluation. Please ensure it is attached to an 'INTERNAL ONLY' folder (to ensure that suppliers are not able to see it)
- Unless all suppliers have completed their responses in full you will not be able to complete any additional steps. This is not a problem, simply use the RFX messages facility to advise suppliers whether they have been successful - see "Send a Message" topic for full details on this process
- To continue with Award process (where this is possible)
 - Select the 'Analyse' tab
 - Click checkbox to select 'Award Scenario to Select for Further Competitions Scenario'
 - Click 'Run Now'
 - Click the refresh symbol
 - Once the scenario has run, select the award scenario again and click the rosette symbol to allow the scenario to be awarded
 - Select the 'Award' tab
 - Select the checkbox next to 'Lowest Cost Outcome'
 - Click 'Delete'
 - Click 'Save Scenario Allocation'
 - Click 'Post All'
 - Click 'Award Event'

Find Supplier Responses to an RFX

- Log in to Emptoris
- Click in to your RFX
- Click on to the 'Monitor' tab
- Click on the yellow folder towards the top left hand side of the pane so that it opens
- A new pane should open in the bottom half of your screen with a list of the valid responses from suppliers and hyperlinks
- You can also access the responses by clicking in 'RFX attachments' at the top left of the screen (next to the paperclip icon) – all valid supplier responses will also be stored here

Support Contacts

- Phone support - all calls must be logged through the Helpdesk - 0345 410 2222
- General Technical Support - enablement@crownccommercial.gov.uk