Supplier Guide:
Responding to an Invitation to Tender (ITT)

An ITT is also known as a Request for Proposal (RFP) and throughout this document these words will be used interchangeably.

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1. How to respond to a Request for Proposal (RFP) – Overview

To successfully participate in an RFP there are a series of steps that need to be performed. Responding to an RFP begins with the same procedure that is used to participate in any RFx (RFI, RFQ, RFP, Standard Auction, and Advanced Auction).

a) Locating and reviewing the RFP

- Finding the RFP and reviewing its details, which will help you to decide whether or not to accept the invitation to participate

b) Accepting and Declining an invitation

- Once the RFP details have been reviewed, Accept or Decline the invitation to participate.

c) Viewing, Downloading and Uploading attachments

- There may be attachments or documents sent by HM Revenue & Customs (HMRC) that you will need to review. These may be Tender Instructions or terms and conditions of the events.
- In response to a question(s) there may be documents that you want to attach and send to HMRC.

d) Place a response

- It is during this step that you will review and respond to a series of questions.

e) Revise a response

- After reviewing your responses, you or someone in your group may decide that you would like to make a change.

f) Submit a response

- Once your response is complete you need to submit your response to HMRC. The information that you provide will be evaluated by HMRC.

g) Send and Receive Messages

- If you need to communicate with members of HMRC, the system provides a built in messaging email.

h) Reporting

– After completing the questionnaire(s), a variety of reports can be run, summarising the information, which you can download and save.

2. Log in to Sourcing@HMRC

HMRC will provide you with log in details generally as a result of your expression of interest in an OJEU advertisement.

You will receive two eSourcing application generated emails containing the following information:

- A unique Username and Password providing access to the application (only applicable if you are a new user to the eSourcing application).
- An invitation to the specific event containing a link to the application and access to the particular event you have been invited to.

Log in to the application using the Username and Password provided by HMRC. Note that these are both case sensitive.

Steps

1. Access the Sourcing@HMRC website (https://sourcing.hmrc.gov.uk).
2. Type in your login ID and password - **note these are case sensitive**.
3. If this is the first time you log in, you will be prompted to do the following:

a. change your password

b. accept the HMRC eSourcing site access Terms & Conditions

Tips

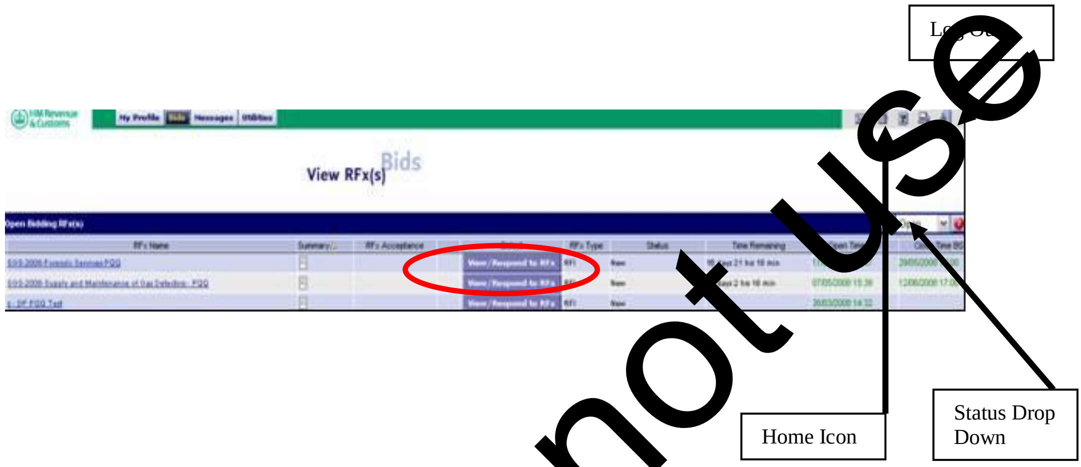
- Your email invitation to participate in any event ((RFI, RFQ, RFP, Standard Auction, and Advanced Auction), will come from Sourcing@HMRC.com. Please ensure if you have any email filters enabled, that these allow you to receive emails from this particular email address.
- Pop up blockers for this internet site will also need to be disabled. If using Microsoft Internet Explorer, go into Tools, Internet options, click the Privacy tab, select Pop-up Blocker Setting, and then add https://sourcing.hmrc.gov.uk to the list of site exceptions. Alternatively, go to Tools → Pop-Up Blocker → Pop-up Blocker Settings and add https://sourcing.hmrc.gov.uk to the list of Allowed Sites
- The HMRC eSourcing front screen has links at the top for the Sourcing Home Page (Supplier's Guide for selling to HMRC), Training material, Terms & Conditions and HMRC Privacy Policy. There are also options to reset your user name and password..

3. Locate the RFP

Once you have logged into the system, you will arrive at the **View RFx(s)** page. This page will display any RFP (Request for Proposal) that you may want to respond to. The **Status** column of this page will display **New** for any event that you have not yet accepted to participate in.

Steps

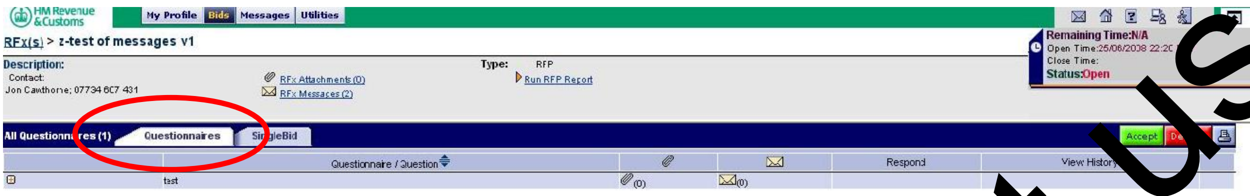
1. From the **View RFx** screen, locate the ITT from **the RFx Name** column.
2. Click the **View/Respond to RFx** button from the **Select** column



- Can't locate the RFP? You can filter your view by selecting the appropriate status in the drop down list next to the Binocular icon: All, Open, Close, Pending, Awarded or Paused.
- Click the Home icon from any page in the event to return to this page. This is located in the top right hand corner of the page.
- Click the Log Out icon from any page in the event to exit the application.
- Contract the HMRC procurement representative that is managing the event to ensure the event invitations have been issued. If you do not know the contact details please email OperationsSupportTeam@hmrc.gsi.gov.uk

4. View the RFP

Once you have clicked on the **View/ Respond** button, the details of the RFP are displayed. These details consist of a sequence of questions contained within individual questionnaires as well as item information for each line item. The **Questionnaires** are used to identify and group questions related to specific subject matter.



Steps

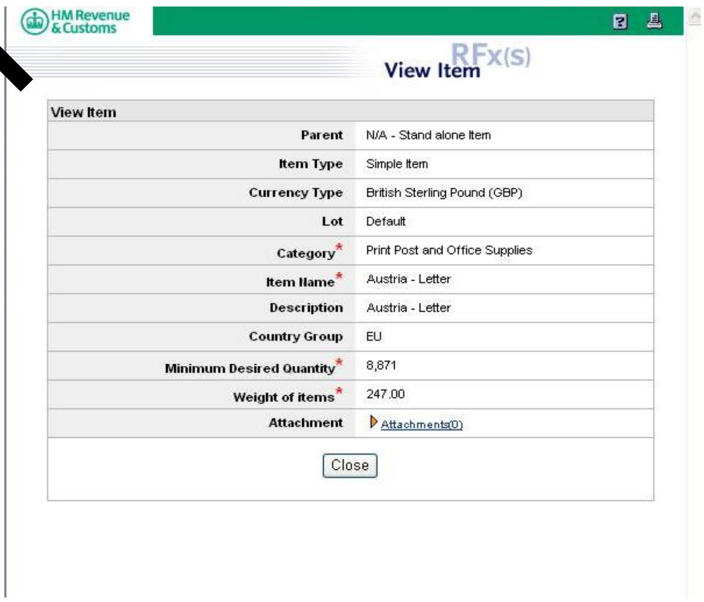
1. To view questionnaires and questions, select the **Questionnaires** tab.

   View the **Questionnaire / Questions** from the RFP page.

3. To view the item information from the **SingleBid** tab, click the item name link from the **Name** column.

4. Review the details from the **View Item** window.

   Repeat for each line item.



Tips

- The system will display the time remaining in the RFP (top right hand corner of the page), it's important to make sure that you complete the RFP in the allotted time. Once the RFP has closed, you will no longer be able to bid.

5 Accept the Invitation

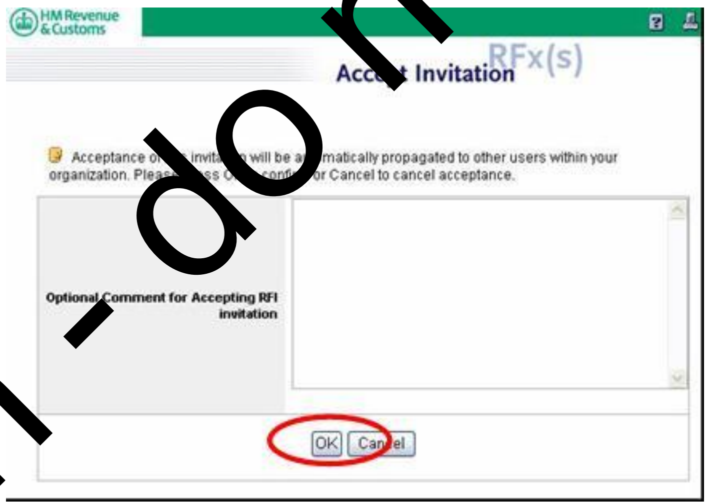
Before you acknowledge your participation, you can review the details contained in the RFP as outlined in Section 4. Here is where you must decide whether you will accept or decline to participate. You must accept the invitation before you can place responses.

Steps

1. To participate in the RFP, click the green **Accept** button on the top right side of the page.

2. From the **Accept Invitation** window, provide an optional comment and click **OK.**The RFP page will refresh to display red **Place Response** buttons in the Respond column. This will enable you to respond.

3. To decline your participation, click the red **Decline** button. If you Decline the invitation, you will not be able to respond.

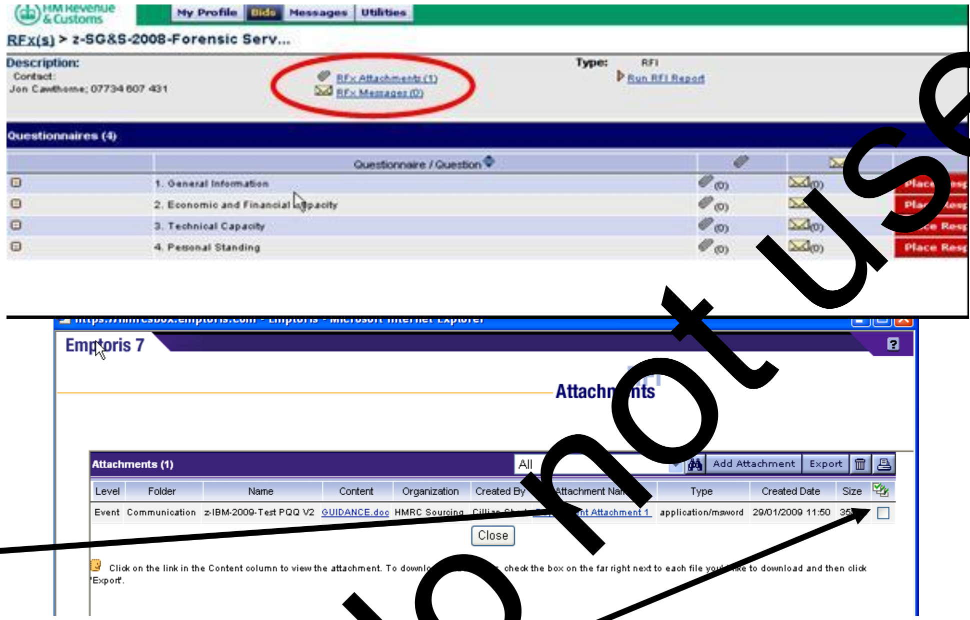


Tips

- Acceptance of this invitation is an acknowledgment of your participation; this acknowledgment will automatically propagate to other invited users within your organisation. It is not necessary for them to accept this invitation

6. Download Attachments

Attachments are specific documents, such as Word document files or Excel spreadsheets. These could be for example, Tender instructions, Specifications and Terms & Conditions, which may be attached to the Request for Information. Please read these before responding to the RFI.



Steps

Download (to transfer from the system)

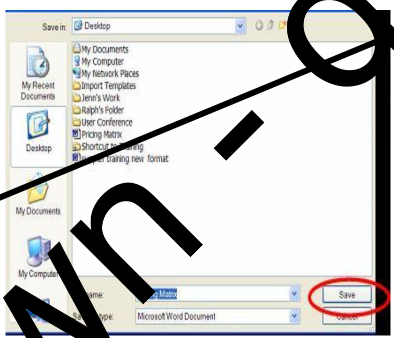
2. To download attachments, click on the **RFx Attachments (x)** link.

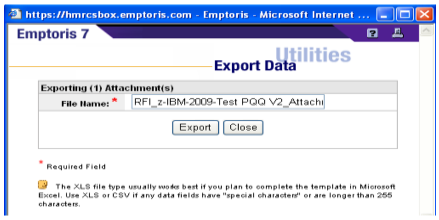
3. Right mouse click on the Attachment **Name** and click "**Save Target As**…"

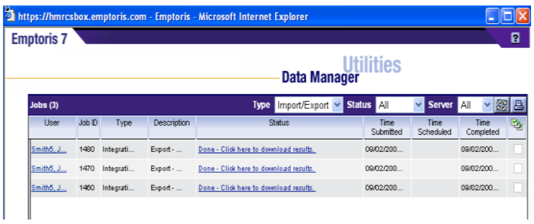
4. Save the attachment on your local system

If there are multiple attachments, then

a) Select the attachments you want by clicking in the small box or select all the attachments by clicking on the all attachments icon.
b) Click on the Export button
c) Click on Export Button
d) Save the attachment on you local system







Tips

- If there are attachments available for download, the RFI Attachments link from the top of the page will display a number of 1 or greater in brackets

7. Upload Attachments

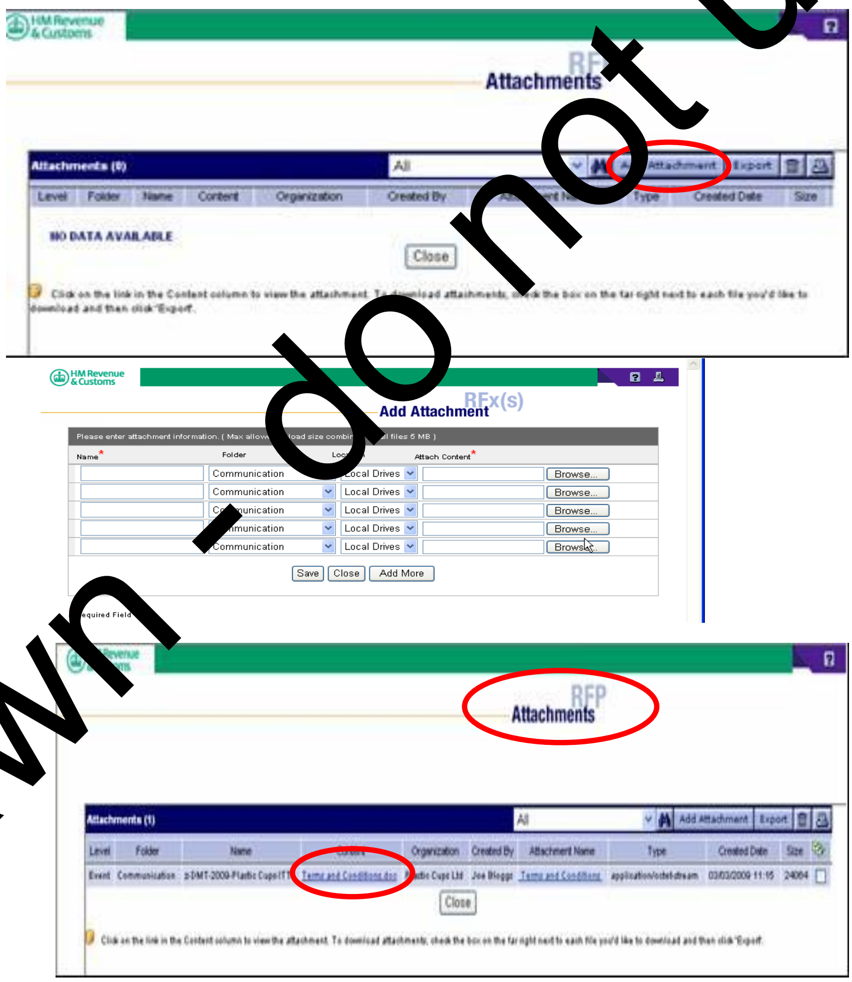
Attachments are specific documents, such as Word document files or Excel spreadsheets, and these can be added to your response.

Your attachments may be for example, your company accounts, if these are requested by the buyer. Please ensure you fully read any Instructions to Tenderers which are attached to the event in regard to when attachments should be uploaded. Generally attachments should not be uploaded unless specifically requested by HM Revenue & Customs (HMRC).

Steps

Upload (to transfer to the system)

1. To upload attachments, click on the **RFx Attachments (x)** link.
2. Click the **Add Attachment** button.
3. Provide the necessary information within the **Add Attachments** window.
4. Click **Browse** and locate the file from your hard drive.
5. Click **Save** when you are finished. Your attachment has been successfully uploaded when displayed in the **Attachments** window.



Tips

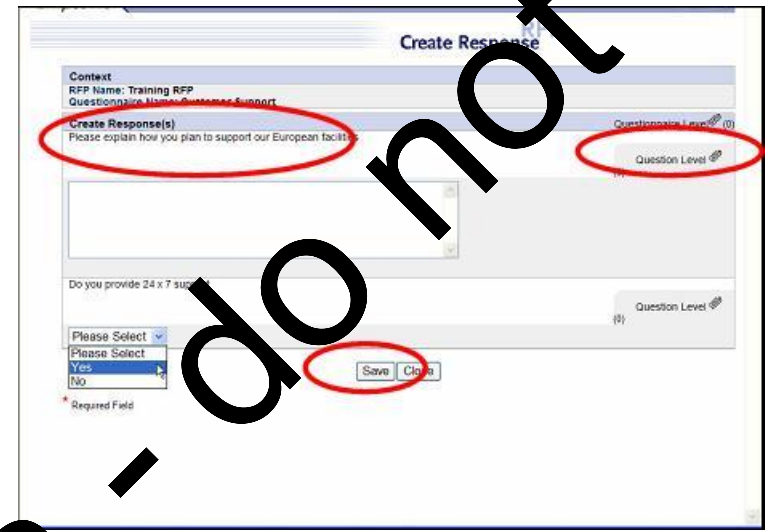
- Attachments uploaded to the system cannot exceed the maximum allowed file Size (5MB). This size is per attachment.
- Please avoid any specialist file types which are not generally compatible. i.e. not compatible with the standard Microsoft Office suite or Adobe PDFs. Seek pre-approval before adding other files types.
- Consider breaking the file into 2 if greater than 5MB.
- Unless specifically requested, add attachments at the question or item level rather than at the overall event level

8. Respond to a Questionnaire

This RFP screen displays the questionnaires/questions that you have been asked to respond to. Questions may have different answer types. Make sure your answer corresponds with the question being asked.

Steps

1. To respond to questions contained in the first questionnaire, click the **Place Response** button.
2. Answer the first question based on the answer type defined (e.g., text, selection, integer, decimal, etc.)
3. Click the **paperclip** icon to attach a file to this question (if applicable). The process of uploading an attachment is defined in the previous section.
4. Click **Save** to save this response. This only saves the responses, it does not submit them.
5. Repeat steps 1-4 for the remaining questionnaires.



Tips

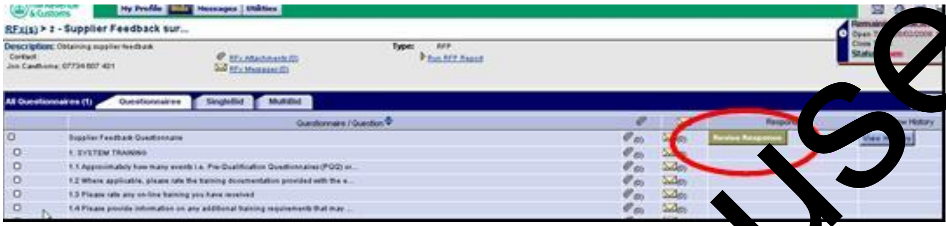
- If there are required fields (*), you must answer them before clicking the **Save** button. Note however, unless specifically requested in the Instructions to Tenders **all questions should be completed** regardless as to whether they have the required field (*) marker against them. This has been done to make it easier for you to save you draft work when completing large questionnaires.
- Frequent saving is recommended, as although the system does warn you, it will automatically log you off after 30 minutes of inactivity.

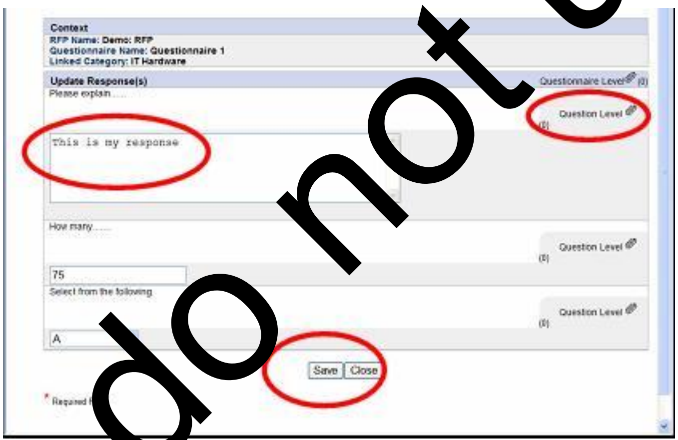
9. Edit a Response

Once a response has been saved, a “DB” icon appears next to the questionnaire/questions. This indicates that a Draft Bid (response) has been created. You or someone else in your organisation can edit responses prior to the closing time of the event.

Steps

1. To make edits to a questionnaire, click the **Revise Responses** button next to the questionnaire.
2. Make your changes.
3. Click the **Save** button. Changes made will replacing the existing response.





Tips

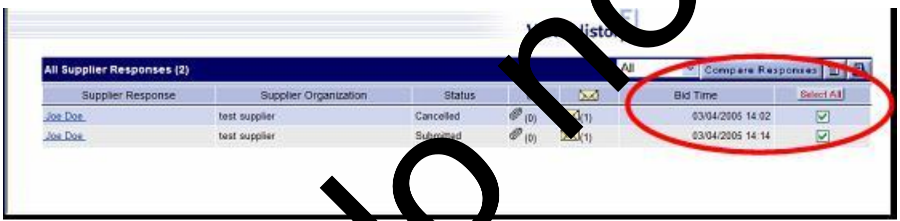
- The RFP must be **Open** in order to make changes.
- Edits can be made to attachments or attachments added by clicking the **paperclip** icon. Old attachments should be deleted by clicking the tick box on the far right hand side and selecting the Bin icon. New attachments can then be added.

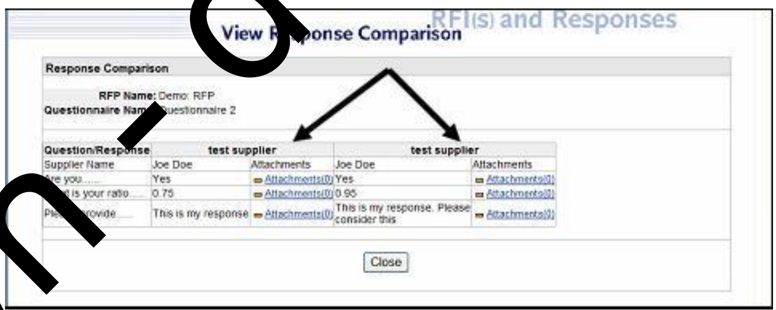
10. Review and Compare Responses

The **View History** window displays the status of your responses as well as a history of submitted responses. Submitted responses can be compared to any previously submitted responses.

Steps

1. To display a history of your responses, click the **View History** button.
2. To compare responses, select the responses that you want to compare by clicking in the checkboxes.
3. Click the **Compare Responses** button.
4. The **View Response Comparison** window will display, allowing you to compare the selected responses, side by side.





Tips

- The **View Response Comparison** window also allows you to compare a history of attachments that you have uploaded into the system.

11. Place a Single Bid

The RFP screen displays the line items that you will be asked to place bids on. You will have the ability to bid on line items individually with the **Single Bid** tab in the forefront. This method of bidding is typically used when there are a limited number of line items in the RFP.

Steps

1. Click the red **Place New Bid** button next to the first line item.

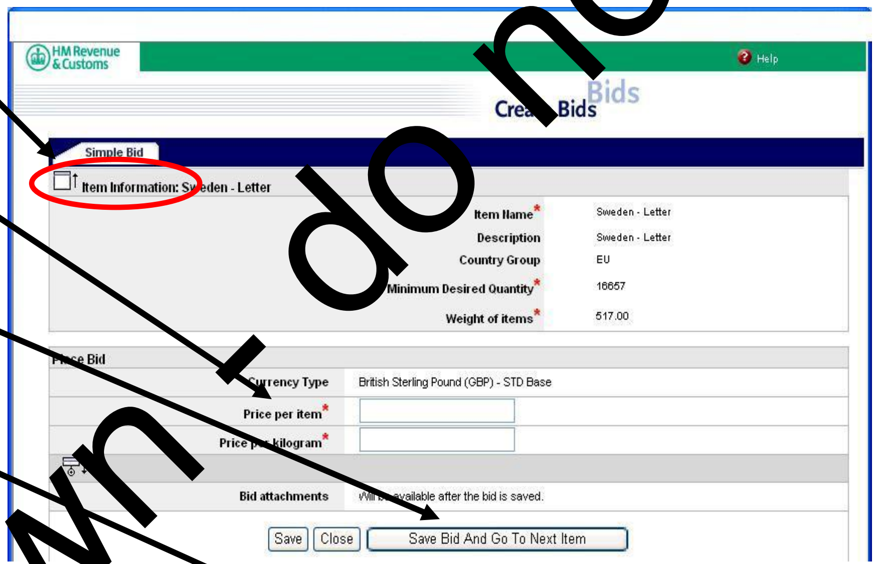
2. From the **Create Bids** window, click the **Item Information** icon to view/hide the item details.

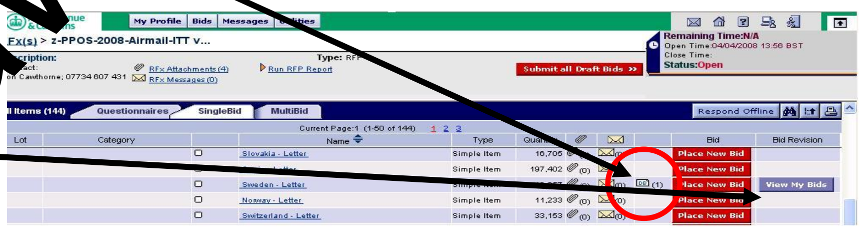
3. Enter your bid by filling out all bid fields

4. Click on **Save Bid and Go to Next Item** to save this bid and continue to the next line item.

5. Observe the bid status on this item. The **"DB"** icon indicates that a draft bid has been created. A 'B' indicates that a bid has been submitted. See step 15.

6. Repeat this process for any remaining line items in the RFP.



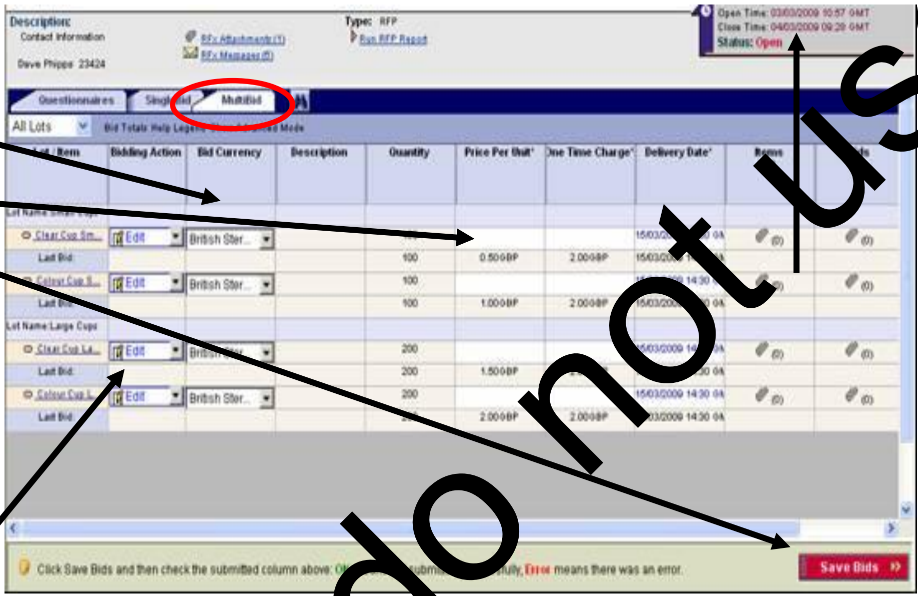


12. Bid with MultiBid

The **Multi Bid** tab allows you to bid simultaneously on line items using a spreadsheet format. This method of bidding is typically used for bidding on several line items (generally greater than 30 approx). The MultiBid function is accessed with the **MultiBid** tab in the forefront.

Steps

1. Select the currency, if applicable.
2. Enter your bid by filling out the fields
3. Click the red **Save** button.
4. The **Confirm Bids to Submit** window will total each bid (PPU x Quantity). Click **OK**.
5. The **Saved Bids** window will confirm that your bids have been saved. Click OK to close this window. The Bidding Action will change from Create to Edit.
6. Observe the bid status on this item. The **"DB"** icon indicates that a draft bid has been created. A 'B' indicates that a bid has been submitted. See step 15 for details.



Tips

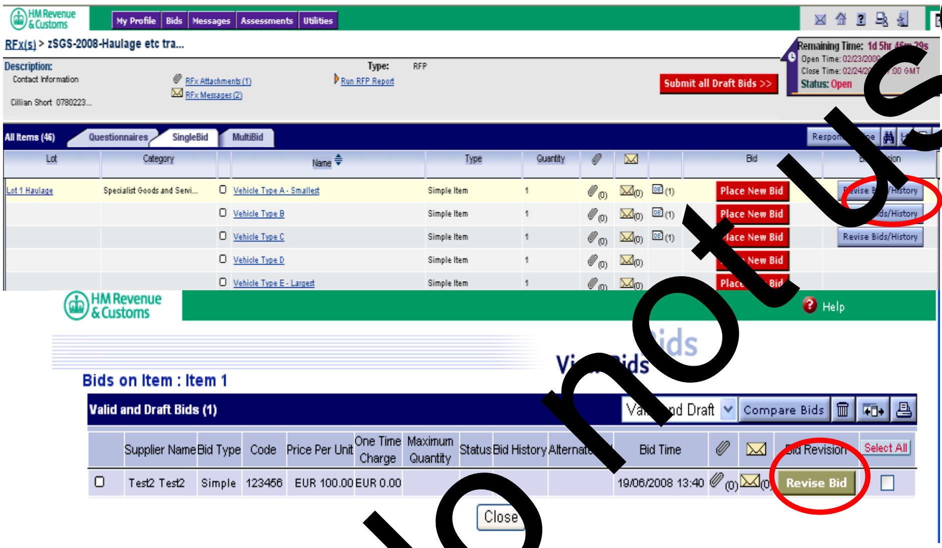
- The **Bid Totals** button will detail a bid summary.
- The **Help Legend** button at the top of the page will provide an explanatory list of the symbols.
- **Attachments** can be downloaded and uploaded from this page.
- To **download**: Click the paperclip icon from the Items column.
- To **upload**: Click the paperclip icon from the Bids column.
- The **Bid Status** column details the status of any bids.

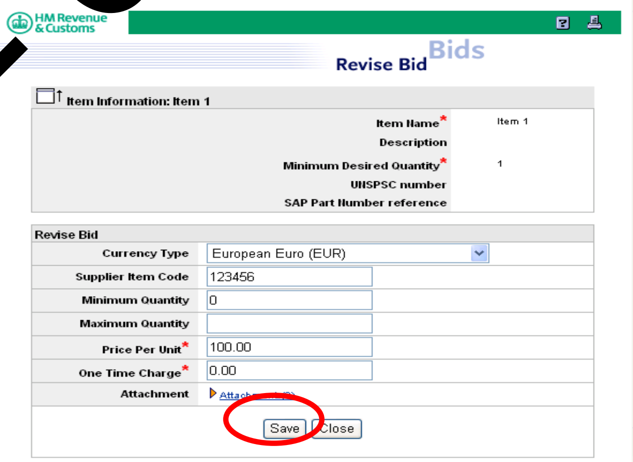
13. Edit a Bid

Once a response has been saved, a “DB” icon appears next to the Bid. This indicates that a Draft Bid (response) has been created. You or someone else in your organisation can edit bid prior to the closing time of the event.

Steps

1. Click the **Revise Bids/History** button to the right of the line item that you want to edit.
2. From the **View Bids** window, click the **Revise Bid** button.
3. From the **Revise Bid** window, edit the bid. Click **Save**.





Tips

- The RFP must be **Open** in order to make changes.
- Once a bid has been edited, the status of the previously saved bid is changed to **Cancelled** and the edited version is saved.
- If drafts bids have been created, ensure you click the **Submit all Draft Bids** button at the top of the page.
- Consider using the **MultiBid function** for edits if you are making edits to multiple line items.

14. Delete a Bid

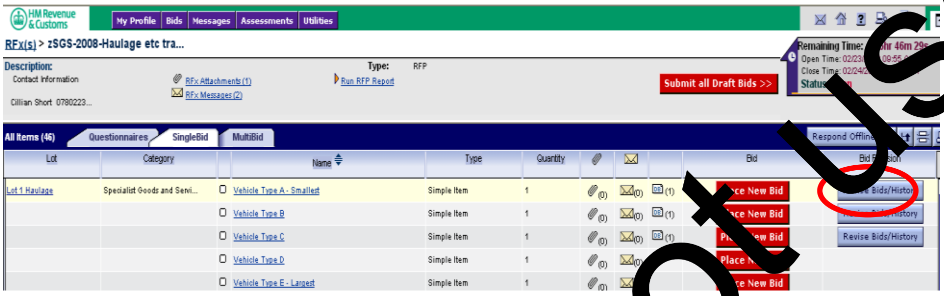
You can delete a bid from the system, if you need to. If you delete a bid, the bid is considered to be **Invalid**.

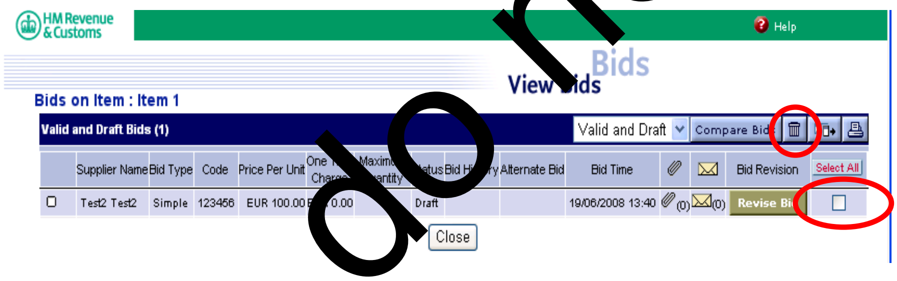
Steps

1. Click the **Revise Bids/History** button to the right of the line item that you want to delete.

2. From the **View Bids** window, click in the checkbox next to the bid that you want to delete.

3. Click the "**dustbin**" icon to delete the bid from the system.



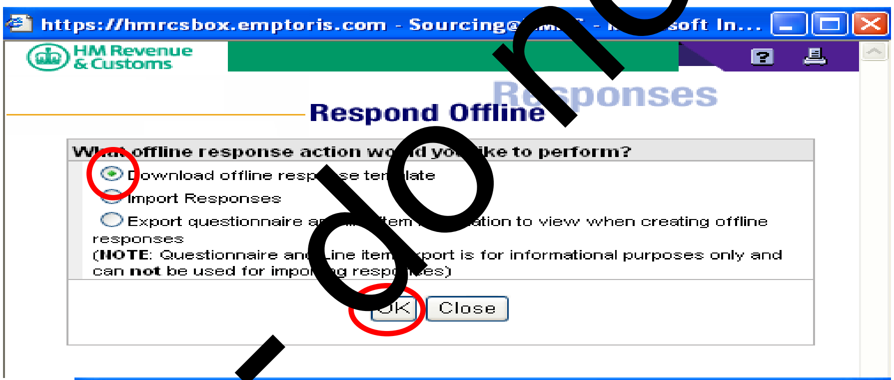


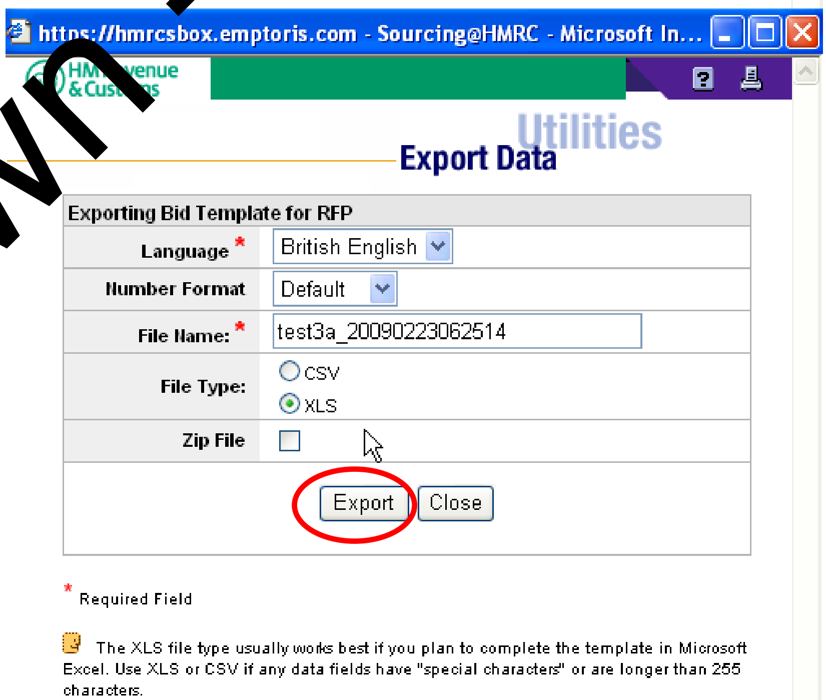
15. Responding Offline

In certain circumstances, you may find it easier to create your responses offline.
It should be noted that any responses that you have made onto the system will be exported if you decide to create other responses offline.

Steps

1. Click the **Respond Offline** button in the top right hand corner of the screen.
2. Select the **Download offline response template**.
3. Click **OK** button
4. Click on the **Export** button
5. Save the file to your local drive.
6. Detailed instructions are included in the Excel Spreadsheet.
7. Please also refer to the How to respond offline document.





15. Submit response

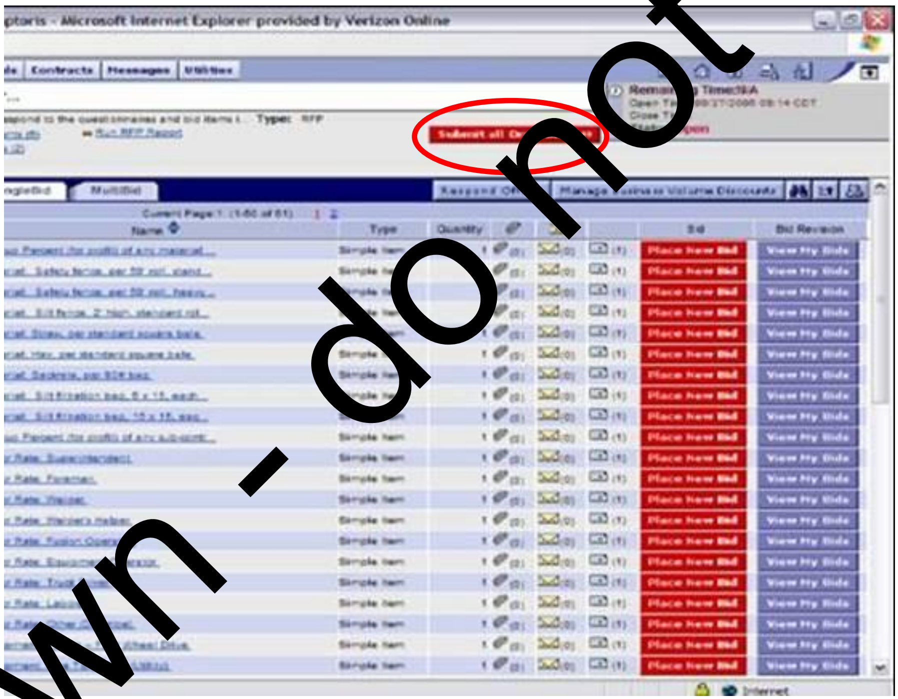
You need to submit your response before the closing time of the event by selecting the red Submit All Draft Responses button. Once selected the Submit all Draft Responses button will not be visible.

You can still revise your response prior to the closing time of the event and any additional amendments will be submitted automatically by the system.

The purpose of the functionality is to prevent HMRC from seeing your response until you are happy it is complete. Once selected, if the event is not locked, HMRC can see all amendments as they occur.

Steps

1. To submit your response to HMRC, select the Submit All Draft Responses button.
2. **Once submitted you can still amend your response if the event is still open.**



Tips

- The status of your response is visible on the far right for each Questionnaire/Question and each Bid item. DB denotes, Draft Bid, whilst R and B, denote Response and Bid respectively. For the Questionnaires/Questions and items you have responded to, a DB will be visible, however once you have clicked the Submit all Draft Responses button this will change to an R for Questionnaires/Questions and a B for items.
- For Questionnaires/Questions, the Submit all Draft Bids button will disappear, when each of the Place Response buttons beside each questionnaire has changed to Revise Response. Any changes to the Questionnaire/question will be submitted automatically, while the event is still open.
- For Bids, the Place New Bid button appears beside each item and multiple bids are allowed – this will be shown with a number B or DB in the Status column. If there are any Draft Bids, the Submit all Drafts button will appear at the top of the screen. If the number in this column is greater than 1, then use the View my Bids button to look at your Bid History and delete any unwanted bids.

16. Send and Receive Messages

Messaging allows messages to be sent between the buyer and the supplier affiliated with this event.

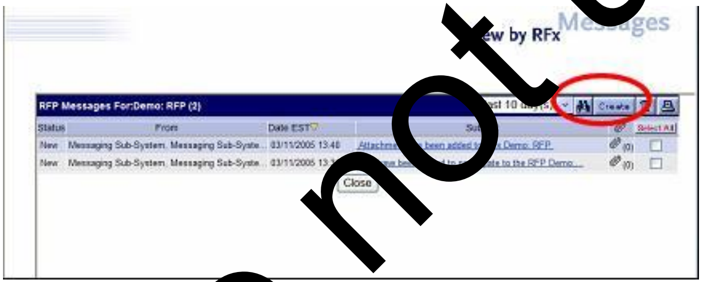
Steps

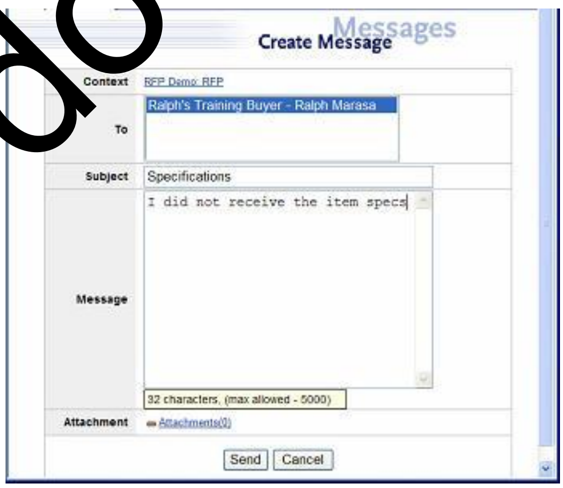
1. To send a message, **first ensure you are within the event** and then click the **RFP Messages** link.

2. The **View by RFx** window will display all messages received. Click the **Create** button to create a message.

3. The **Create Message** window sends this message in the context of this RFP. Select the recipient that you are sending this message to. Unless told otherwise this should be to **'All Hosts'. This message is not visible to other suppliers.**

4. Type in the **Subject**, the **Message** and click the **Send** button.





Tips

The body of the message should not exceed 5000 characters.

Ensure you are within the event before sending a message and you can see the names of the HMRC staff in the "To" list. This will ensure the message is sent to HMRC and not your own organisation.

17. Create a Report

When you have completed filling out each questionnaire and line item bid, you can run a report that will summarise this information. This report can be exported out of the system and retained for your records.

Steps

1. To create a report, click the **Run RFP Report** link.

2. Click **OK** from the **Edit Report Parameters** window.

Note: The Edit Report Parameters allows for customised reporting.

Type of Responses: Report can include Valid, Invalid or Cancelled responses.

RFP Selection: Search on all events that you have participated in.

Question/ Questionnaire: Search and report on specific question/ questionnaires.

Items: Search and report on specific line items.

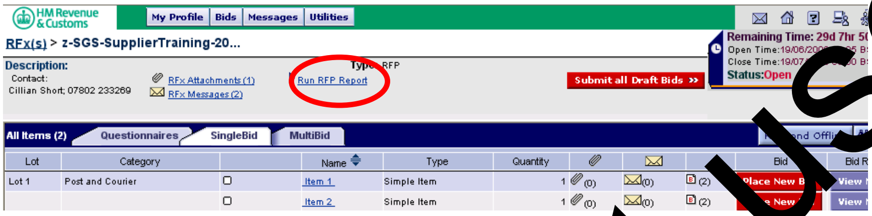
Select Attributes: Select to report on specific bid elements.

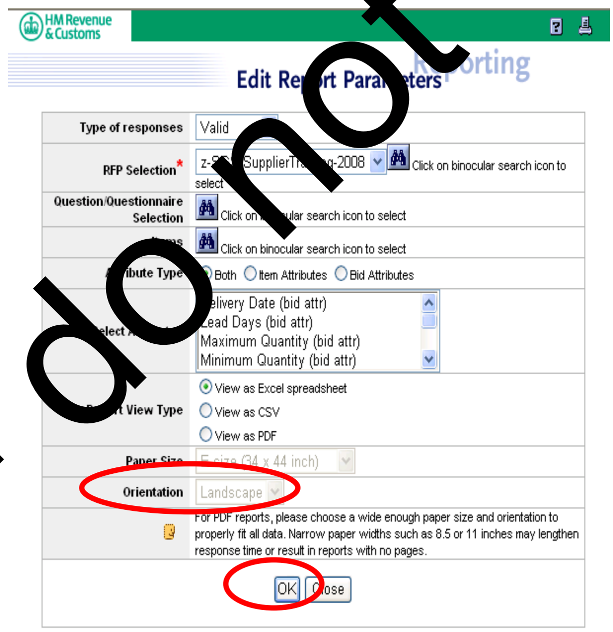
Report View Type: View as Excel, CSV, PDF.

3. In **Data Manager, with the mouse over** 'Done Click here to download results', **Right mouse click on the Attachment Content and click "Save Target As."**

4. Save the attachment on your local system

5. The file can then choose to open the saved attachment from your local drive





Tips

- When you export this information out of the system, it is recommended that you export into Excel or CSV format. These formats will allow you to customise the look and feel of the spreadsheet.