<u>eSourcing Training Manual for</u> <u>Eversource Energy Suppliers(Pages 1-</u> <u>22)</u>

Supplier Code of Conduct Manual (Also attached pages 1-8)

Please Note: Unfortunately, our application cannot run on IE10 or 11... Here are your options:

- download a free version of IE8... our application will definitely run on IE8 .. or
- try Google Chrome or
- try Fire Fox or
- try compatibility mode

What is our eSourcing Application?

eSourcing is the software package Eversource Energy uses to bid "request for proposals" (RFx's) electronically. The entire bidding process is done through our eSourcing Application.

This training manual will walk you through the process of reviewing / responding to a "Request for Proposal."

Your Registration Confirmation Email

Registering in our eSourcing Applications allows our procurement agents to review your company's information and possibly add your company to a bidders list, if an opportunity arises.

After you have successfully registered in our system, you will receive the following email.

Included in the email is your "User $\ensuremath{\mathsf{ID}}\xspace$ " and "Password."

You will need your User ID and Password in order to successfully log into our Application. As a result, retain the letter for future reference.

Here is your User ID and Password Information



Dear Ann Marie,

Welcome to eSourcing. You have been established as a user of eSourcing software, which is used to facilitate sourcing event Eversource Energy. Because this email contains important Log On information, please keep it in your records.

You will receive another email notification when your participation is requested for a specific sourcing event. In the interim, please follow the steps listed below to ensure you can connect to the system.

A temporary eSourcing application password has been generated for you. After you Logon using the new temporary password, you will be prompted to change your password.

Your user name: stewaama Your temporary password: 4gaCW8xOmA

Invitation Email to Bid on a RFx



To Begin Log In and Change Your Password



Next, Confirm Your Participation or Decline the Bid



Next, Navigate to RFx and Review



How to View the Entire RFx ... by Using "Actions" Tab

Once you get to this panel, here is a very nice feature in eSourcing.

Click on "Actions," and select "Create RFx PDF."

This feature gives you the ability to view the entire RFx in a PDF document. For example, you will see description of services or materials, due date, questions, line items, etc.



Here is another nice feature	One
instead of waiting for the PDF file to display, you can select:	
"Stop Waiting, E-mail PDF instead"	
An email with the PDF attached will be sent to you.	



Review the Bid – Header Tab



Review the Bid – Schedule Tab

The "Schedule" Tab is where you will find the **RFx Due Date.**

Also, if there is a Pre-Bid Meeting , the meeting date will be listed under this Tab. Click on the Pre-Bid Meeting Link and you will come to more detailed information about the Pre-Bid.

Note: The Pre-Bid Meeting Section could be in another area... under the **Information Tab**. Be sure to check both tabs to see if there is Pre-Bid Information.

Header Schedule	Information Que	stions Line Items
Schedule		
Schedule Items	Planned Start	Description
Pre-Bid Meeting	12/18/04	
RFP Open For	5/4/12	
Response	5/4/12	

Settings Tracking Dependents	
Title:	Pre-Bid Meeting
Description:	There will be an optional pre-bid meeting at the Ayers Island facility on Thursday, March 29 2012 at 10:00 am with Jeff Patry (207-351-5473) at the following location:
	Ayers Island Hydro 59 Ayers Island Rd. Bristol, NH 03222 603-744-8855
Phase:	Open For Response

Information Tab

The **"Information Tab"** has a lot of information about the RFx. Here are some examples of information you may find in the "Information Section." Open all Links and read the documents.

- **RFP Information**: Click on the link and you will come to "standard" information.
- Workscope and Specifications: The "details" about the RFx.
- Safety & Environmental: Safety & Environmental Information
- Prebid Meeting: Information about the Pre-Bid
- Note: If there is a "checkmark" in the "Has Attachments" field, there are attachments to that document.
- Example: Click on RFP Information and you will see "Attachment." Open and read all "Attachments."

Title: Workscope and Specifications	Attachments		
See the attached for workscope and Specifications		Title:	Workscope and Specifications See the attached for Workscope and Specifications

Heade	r Schedule	Information	Question	ns Line Items	
Inform	ation Section	ons			
#	Informatio	n Sections	Has	Attachments	
01	RFP Informa	ation	V		
82	Workscope	and Specification	ons 🔽	Checkmark inc there is an atta	
83	Detailed Ite	m Descriptions			
8 4	Safety & En	vironmental	Π		
0 5	Pre-Bid Mee	tings			
		s Document	2		

Attachments

Title: RFP Information

To Whom It May Concern:

You are requested to provide a proposal for the services and/or goods described in this request.

SUBMISSIONS

Your proposal must be received no later than the response date and time requested or your proposal will be disqualified. Any proposals not submitted on-line, unless authorized by the contact above, will cause your proposal to be disqualified. Neither electronic nor hardcopy proposals will be opened prior to the response date requested. Receipt confirmation of your proposal is displayed on-line in the form of "firm" status. All other confirmations are your responsibility and should not rely on an individual response from the contact above. You are not allowed to submit revised or improved proposals after the response date unless specifically requested to do so by the contact above. Authorized hard copy portions, if any, of your proposal must reference this request and be sent to the attention of Purchasing Administrative Assistant and addressed as follows:
Eversource Procurement Department - BMN1: 107 Selden Street: Berlin. CT 06037.

Questions Tab

The "Questions Tab" is a section of question document(s).

Notice in this example, "#1 – Services RFP Questions" there are 12 questions and 8 of them you must answer. The questions that must be answered are identified with an *.

Open all documents and make sure you answer the questions, especially those questions with *.

Note: You will not be able to submit your RFx if you do not answer any of the "required" questions.

When done, click on the "save" button. If there are other "Question" documents, click on the "down arrow" or "next>>" tabs to get to the next "questions" document.

Note: To get back to your "Tabs," Click on your back arrow or the "PROP..." link located at the top of the panel.

My Workbench > Service For River Project > PROP-01227-NU-2012 > Services RFP Questions

ead	ler	Schedule Informatio	n Questions Line Ite	ms	
es	tio	ons			
	4	THE	0	D	
	#	Title Services REP Questions	-	Required Questions Answered	0
	# 1	Title Services RFP Questions	-	- · · · ·	Ū
•	# 1 2		-	0 out of 8	Û



Lines Tab

The "Lines Tab" is the place you enter your pricing information.

Note: There could be information in the "Line Tab" advising you to go another place to enter in your pricing.

In the first example, notice there are "No line Items." There is information advising you to go to the "Attachments" Tab.

Another place you may be directed to go for pricing information is the "Information" Tab.



	Header Schedule Information Q	uestions Line Items			
	Line Items				
	Basic View Group By: Sh	now all 💽			
	Quantity Filled	N,	A - Unit Price	N/A - Extended Price	
	All Line Items				
7	1. ANNUAL COST - PROV EQUAL PAYMENTS - 1 LO	/IDE YOUR ANNUAL CO	ST FOR GROUNDS MAI	INTENANCE TO BE BILLED MONTHLY IN 7	Û
	1 LO		USD	USD	Û
	Line Items				
	Basic View 🔹 🕻	Group By: Sho	wall 💌		
~	Quantity Filled	I N/A	- Unit Price	N/A - Extended Price	2
7	All Line Items	1			
	1. N/A - Supply hou 1 HR	rly rate for nor	USD	ours - SV SERVICES - BEC - :) USD	I HR
	▼ 2. N/A - Supply hou	rlv rate for ove			
	1 HR		USD) USD	
	3. N/A - Supply hou	rly rate for wee			
	1 HR		USD	USD	
	4. N/A - Supply hou 1 HR	riy rate for eme	USD	SV SERVICES - BEC - 1 HR	
	▼ 5. N/A - Supply hou	rly rate for equi			
	1 HR		USD	USD	

More Examples:

The first example is asking for a lump sum annual cost. You would enter your lump sum cost in the "USD" field.

The second example is asking for hourly rates for "normal business hours," "overtime," "weekends," etc

When done, click on "Save."



Lines Tab ... More "Pricing" Examples (con't)



How to "Attach" your Proposal using the Attachments Tab



The "Attachments" Tab is where you may find documents such as:

- Specifications
- Work Scope Documents
- Work Rules
- General Terms & Conditions

It is possible some of these Attachments need to be filled out. If that is the case, you must open the attachment, save it to your computer drive, complete the document and re-attach it.

Use the "Attach File" or "Quick Upload" located at the bottom of the panel to attach your completed documents.

Click "OK" when done attaching your document(s).

File name	Description	Size	Date Added
RFx Attachments			
Contractor Work Rules Appendix A.pdf	Northeast Utilities Safety and Environmental Questionnaire (Long Form) for Prospective Contractors (To be submitted as part of contractor's proposal)	32kb	9/27/04 10:41 PM (EDT)
Contractor Work Rules Appendix B.pdf	Northeast Utilities Safety and Environmental Questionnaire (Short Form) for Prospective Contractors (To be submitted as part of contractor's proposal)	31kb	9/27/04 10:42 PM (EDT)
Contractor Work Rules Appendix C.pdf	Safety Questionnaire for Prospective Contractors Contractor OSHA- 300 Log and Experience Modification Rate Summary	35kb	9/27/04 10:43 PM (EDT)
Contractor Work Rules Appendix D.pdf	Safety and Environmental Questionnaire for Prospective Contractors Contractor Safety, Health and Environmental Inspection Summary	26kb	9/27/04 10:44 PM (EDT)
Contractor Work Rules Appendix F.pdf	CERTIFICATION OF CONTRACTOR'S RESPONSIBILITIES FOR SAFETY	37kb	9/27/04 10:45 PM (EDT)

RFx Response Attachments
REx Response Question Attachments
Attach File Attach URL
Quick Upload:
ок

Discussions Tab



The "**Discussions**" **Tab** is where discussions are stored. You can also create a discussion and respond to discussions. In this example, the supplier has received a message from the Eversource Procurement Department.

To view the message, click on the link

To reply to the discussion from the "Discussion" Tab, click on the "Reply" button to the far right. See below... enter your response in the "Content:" field. You can also add an attachment. When done, click on the "OK" button.

Author:	Ann Marie Stewart
Company:	Vendor A
* Subject:	RE: River Project Update Information
* Content:	
Attachment:	
ОК	Cancel

		Topic/Subject Name Last P	osting	Author	Company	Visibilit
	₽ \$ •	 Vendor Discussions (0 Unread 	<u>Messages)</u>			
Γ [1	River Project 4/26/12 Update Information	2 2:32 PM (EDT)	ANN MARIE STEWART	Eversource	/ Specific Supplier



Discussions Tab (con't)

discussion. You	u will also have an option to "reply" to the discussion right in the email. Author: ANN MARIE STEWART Company: Eversource Subject: River Project Update Information Content: Addendum #1 - See attached addendum. Please co Attachment: eSourcing 2012 Tips.doc Posted: 4/26/12 2:32 PM (EDT)
Sample of Email: 📫	Procurement@eversource.com To: Ann Marie Stewart/NUS@NU Date: 04/26/2012 02:32 PM Subject: New Message Posted to Discussion Subject: River Project Update Information.
	Dear Ann Marie, You have a notification from eSourcing.
	This message is to inform you that there has been a new message posted to the subject: River Project Update Information .
	Title: Service For River Project Posted By: ANN MARIE STEWART from Eversource Posted Date: 4/26/12 2:32 Subject: River Project Update Information Message Preview: Addendum #1 - See attached addendum. Please confirm you have received it by reply to this message.
	To login and view this document, please click the link: <u>View Full Message</u>

To Create a "Discussion" (con't)

My Workbench > Service For River Project > PROP-01227-NU-2012 To "Create" a "Discussion," click on the RFx RFX-00172-2012: Service For River Project "Discussions" tab. / RFx Response PROP-01227-NU-2012 in RFx RFX-00172-2012: Service For River Project 🔚 Save 🕼 Undo 🖹 Document 🛛 🕅 Actions 🗸 🖓 Reports 🗸 🕅 Attachments 🦪 Discussions 획 Chat 🐗 In Progress 🚔 Submit ▼ Next, click on the "down arrow" located to the Discussions: left of the "pencil" icon and select "New Topic/Subject Name Last Posting Author Company Visibilit Message." \bigcirc Vendor Discussions (0 Unread Messages) 🖉 Edit

You can enter in a "Subject." Then enter your question in the "Content:" field. Notice you can attach a document. Just click on the "gray" box with the "..." and attach your document.

When done, click on the "OK" button located in the lower, left side of panel.

You successfully sent your question by email to the Procurement Agent . The question will also "post" in the "Discussion" Tab.



tion (0 Unread Messages)

H New Message

Submit Your RFx – "Submit" Tab



Once you "Submit" your RFx

You will receive an email advising you that Eversource Energy has received your proposal.

	RFx Response PROP-01227-NU-2012 on RFx Service For River Project has been received by Eversource.		
	From: Ann Marie Stewart	12/05/2012 01:46 PM	
		Show Details	
For River	hn age is to notify you that your RFx Response PROP-01227 Project has been received by Eversource. t of contact is ANN MARIE STEWART:	-NU-2012 on RFx Service	
Phone:	tewaam@nu.com		
Thank you			

To Decline the RFx

If after you review the RFx and decide your company would like to **"decline" the bid**, click on the "In Progress" button, top, right side of panel.

x Auctions Contracts XPress

My Workbench > Service For River Project > PROP-01227-NU-2012

RFx RFX-00172-2012: Service For River Project

// RFx Response PROP-01227-NU-2012 in RFx RFX-00172-2012: Service For River Project

 Garage
 Garage



Eversource Energy has been notified that you have declined their offer to bid on the project.

Notice the status of the RFx has gone to "Declined."



Who in My Company is Going to Receive the Email RFx Invitation to Bid?

What determines who at my Company is going to get	Contact Information	
the email invitation to bid?	First Name:	
That is a very good question.	► Last Name:	
When you register in our eSourcing Application,		
there is a section "titled" "Contact Information."	Title:	
Here is where you enter in the name / email / phone	E-Mail:	
# of the person who should receive the invitation.	Phone:	
You can certainly add more than one contact. If		
additional contacts are needed, email your		
procurement agent and they will add your additional		

contacts. See Page 9 to learn how to get your procurement agent's email address. Reminder:

If there are multiple contacts listed under your company, the Procurement Agent can only select one (1) person to receive the email RFx invitation to bid.

NOTE: Other contacts at your company (that have user id's and passwords) can log in and review / work

NOTE: However, only one (1) person from your

company can work on the RFx at a time.

Name & Email are required.

on the RFx.