West Northamptonshire Council

Buyer User Guide for In-Tend –West Northamptonshire Council

Live Site: https://in-tendorganiser.co.uk/wnc/aspx/itlogin.aspx

OR

Training Site: https://training.in-tend.co.uk/WNC/organiser/aspx/ITLogin.aspx

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Purpose of this guide:

This guide will show you how to:

- Create and issue a project on the In-Tend supplier portal / Contracts Finder.
- Submit a Contract Notice to Find a Tender.
- Manage the project.
- Manage messages.
- Access supplier returns.
- Undertake an online evaluation.
- Undertake a moderation.
- Award the project on the In-Tend supplier portal / Contracts Finder.
- Submit a Contract Award Notice to Find a Tender.
- Create and manage an approved supplier list

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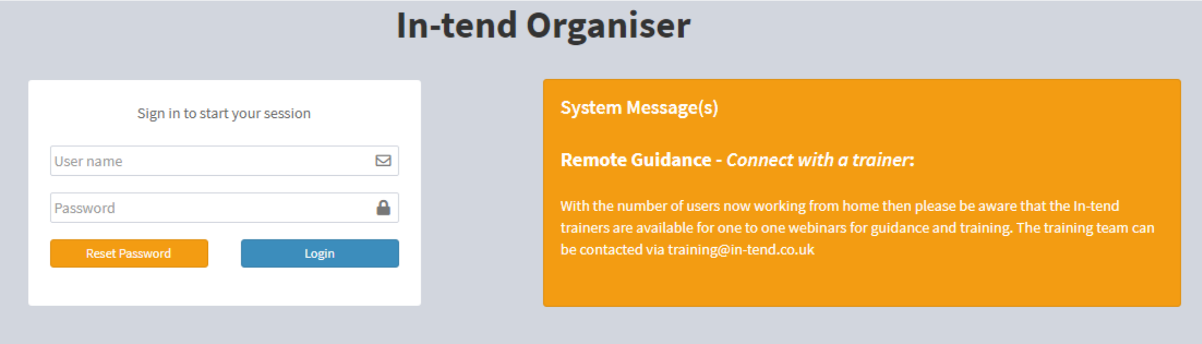
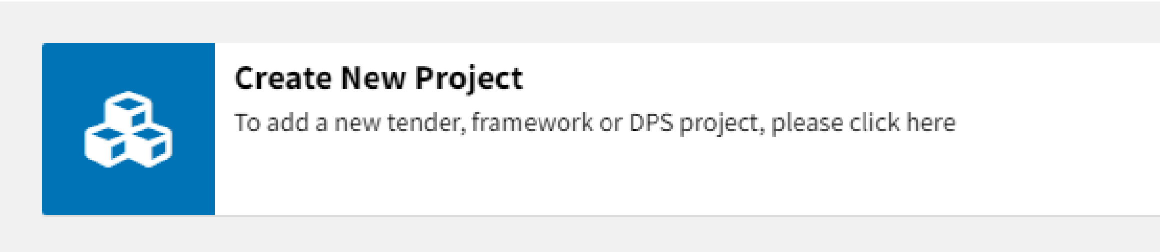
1. <u>Creating a Project</u>

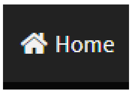
- Go to https://in-tendorganiser.co.uk/wnc/aspx/itlogin.aspx and log in with your username and password.



- Once logged in, from the Home Page click on 'Create New Project'.

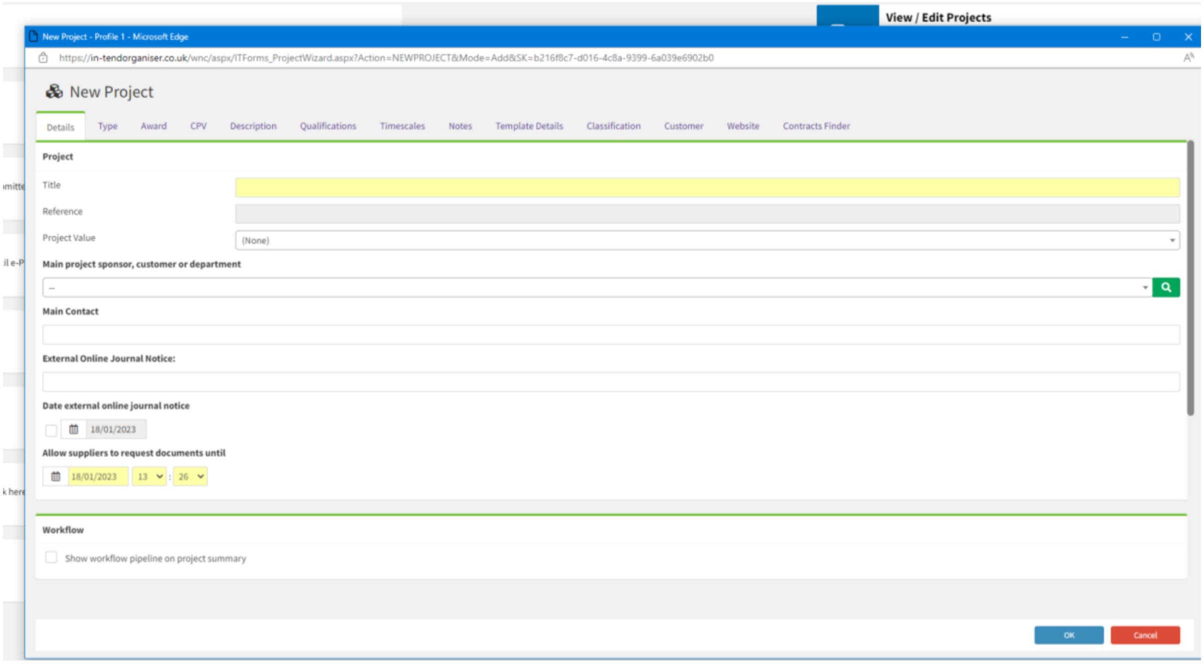


- **Note -** Before you can create a DPS or Framework project, for purposes of the mini-competition element, an Approved Supplier List **<u>must</u>** be created first. See section 14
- **Note** - you can access the home page at any time by clicking 'File' and 'Home Page' or by clicking on the 'Home' icon at the bottom of the screen.



- Once you have clicked 'Create New Project', a pop-up window will appear and you will be required you to enter information into a variety of tabs, with mandatory fields indicated in yellow.
- **Note** – Please enter information onto each tab, selecting 'Ok' when complete. You can only save and subsequently publish the project after all mandatory information has been provided.
- **Note** – you will see reference throughout the user guide to 'Project Summary' and 'Stage Summary'. The Project Summary is the main land page / dashboard for the project, whereas the Stage Summary in the main land page / dashboard for the relevant stage ("Issue event") in the project e.g., SQ, ITT or RFQ.
- **Note** – if you're operating an Open Framework, you can only run one advertised application stage per project. If you need to re-advertise in years 2, 3 and 4 for example, a new project will need to be created for the subsequent application years

Details tab



- **Title**: - Enter a title for the project (this can be updated at any time).
- **Reference**: - The reference number field will be greyed out as this will automatically assigned by the system once the project is first saved (this will follow a sequential number sequence WNC00001 / WNC00002 etc).
- **Project Value**: - Leave this blank
- **Main project sponsor, customer or department**: - Defines the main customer or department that the project belongs to.
  Note - The default customer will be automatic set against the user profile area. Users with access to several customers may choose from the drop-down menu to allocate ownership of the project.
- **Main Contact**: You also have the option of specifying the main contact, within the Council. This information will be displayed on the supplier portal and the advert.
- **External Online Journal Notice**: - Can be used to store the reference number of the Find a Tender submission.
- **Allow suppliers to request the documents until**: - This defines the deadline for viewing the opportunity and expressing interest when advertised on the supplier portal.
  - **DPS** – if the DPS is being kept open for the duration, you can enter the end date of the DPS, so providers can express an interest throughout its life. If the DPS is being operated in “Rounds”, you may want to set an initial deadline (e.g. the Round 1 deadline) and then update this date as appropriate when Round 2 commences etc.
  - **Framework (Closed)** – This date can mirror the submission deadline on the ‘Receipting’ tab as part of the ‘Stage’.
  - **Framework (Open)** – This date can mirror the submission deadline on the ‘Receipting’ tab as part of the ‘Stage’.
- **Show workflow pipeline on project summary:** - Tick this. It will display on the main project summary screen. It basically shows you the project journey and elements which you have completed.
  Note – even with a DPS or Framework, you may find that the terminology on the pipeline references ‘ITT’.

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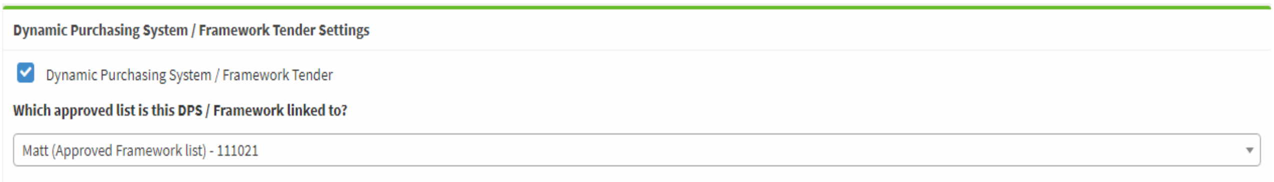
- **Show associated projects on summary page**: - Tick this. It will display on the main project summary screen. It basically shows you the project journey and elements which you have completed.
- **Associated Project**: - select if associated with another project on the system.
  Note - Access to other projects in the list will be governed by the user's access rights
- **Show associated projects on summary page**: - Displays any associated projects (child projects) and the 'Project Wizard' buttons within the current project summary screen.
- **User Restrictions**: -
  - **No access to Audit View whilst a project/tender is open**: Restricts the viewing of the system audit trail whilst the project is in 'Edit' mode. Untick this option.
  - **No access to Project History whilst the project/tender is open**: Restricts the viewing of the 'Project History' whilst the project is in 'Edit' mode. Untick this open.

Type tab

- **Process**: - Allows you to select whether the project is to be published to the external journal (Find a Tender Service) or not.
- **Directive**: - Defines the type of procurement being tendered. Please select the directive.
- **Sub Directive**: - Subset of codes driven by the 'Directive' selected. Required when publishing to third party portals such as Contracts Finder (UK). Please select the sub-directive.
- **Procedure**: - Please select the procedure type.
- **Project creation date**: - Defaults to the current date but select the appropriate project creation date.
- **Dynamic Purchasing System / Framework Tender**: - tick if you are creating a DPS or framework project
- **Which approved list is this DPS / Framework linked to?**: - You must select your approved supplier list from the dropdown, so any mini-competitions can link back to the master project.
  Note - If your approved supplier list is set up in lots, the lots will show as pre-created lots on the 'Lots' tab.



Note - Once you create the DPS or Framework project, these lots will automatically be created by the stage.
Note - If you have not set up your approved list, please go to back to the home page and create this via the 'Approved Supplier List' button.

Contracts Finder tab

- **Contract start date**: Enter the contract start date.
- **Contract end date**: Enter the contract end date.
- **User**: Select "**WNC Procurement"** from the drop down to ensure our team's details are visible on the Contracts Finder advert
- **Region**: Select 'East Midlands' unless outside of Northamptonshire.
- **Value From**: Enter the lowest value.

- **Value To**: Enter the highest value.
- **Additional information on how to apply for this contract**: If you click ‘Standard Text’, some wording will be available to select regarding Contracts Finder which you can adjust to suit your or you can enter free text.
- **Delivery Notes**: If applicable, please complete.
- **Funding**: If applicable, please complete.
- **Tender Information**: If applicable, please complete.

Award tab

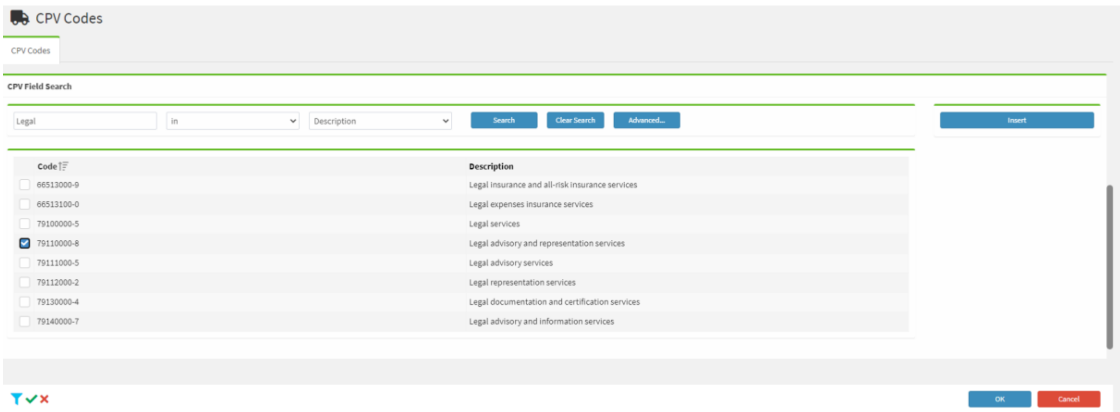
- Project award criteria: - Use this area to set input your award criteria which can be displayed on the supplier portal e.g. Quality 60% ; Price 30%, and Social Value 10%

Criteria	Weighting
Price :	40%
Quality :	60%

- To display the values input, tick ‘Show award criteria on supplier web portal’ on the ‘Website’ tab.
  Note – if any additional criteria need to be added, please speak to the system administrator.

CPV tab

- The CPV code is for the purposes of publication to Find a Tender. Select ‘Manage’ and then use the ‘Code Tree’ or the ‘Field Search’ option to add all applicable CPV codes.
  Note – once you have found the CPV code(s) you want to add, click ‘Insert’. Once all codesare loaded, click ‘Ok’.



Description tab

- **Description**: - Enter the 'Description' of your requirement (this can be updated at any time). This will be published on the supplier portal.
  Note: You can utilise standard text from the library by clicking 'Standard Text. Once pulled through into the project description, it can be modified as required.
- **Synopsis**: - A synopsis file can be attached to add a document to support the project description. Click 'Add' to upload a file. Once uploaded you can then edit and remove the file.

Qualifications tab

- Qualifications: - If applicable, you can detail any qualifications that will be required during the process.
  Note: You can utilise standard text from the library by clicking 'Standard Text. Once pulled through into the qualifications tab, it can be modified as required.

Timescales tab

- **Project Time Zone**: - Displays the time zone that the project will be using for all associateddates & times. No need to amend this.
- **Contract**: - If publishing to Contracts Finder, then the contract start & end date will berequired to publish a notice.
  Note: If creating a DPS project, it is recommended to set these dates after the main end date of the DPS. As these dates must be sequential the end date should be set to the day after the start date.
    - **Contract award date**: Used to enter the proposed award date for the tender.(Optional)
    - **Contract start date**: Used to enter the anticipated start date of the contract.(Optional)
    - **Contract end date**: Used to enter the anticipated end date of the contract.(Optional)
    - **Contract extension date**: Used to enter the anticipated extension date (potentialend date based on the extension period) of the contract. (Optional)
    - **Contract value**: Used to enter the information regarding the size of the contractvalue. (Optional)

  Note: You can utilise standard text from the library by clicking 'Standard Text. Once pulled through into the timescales tab, it can be modified as required.

Notes tab

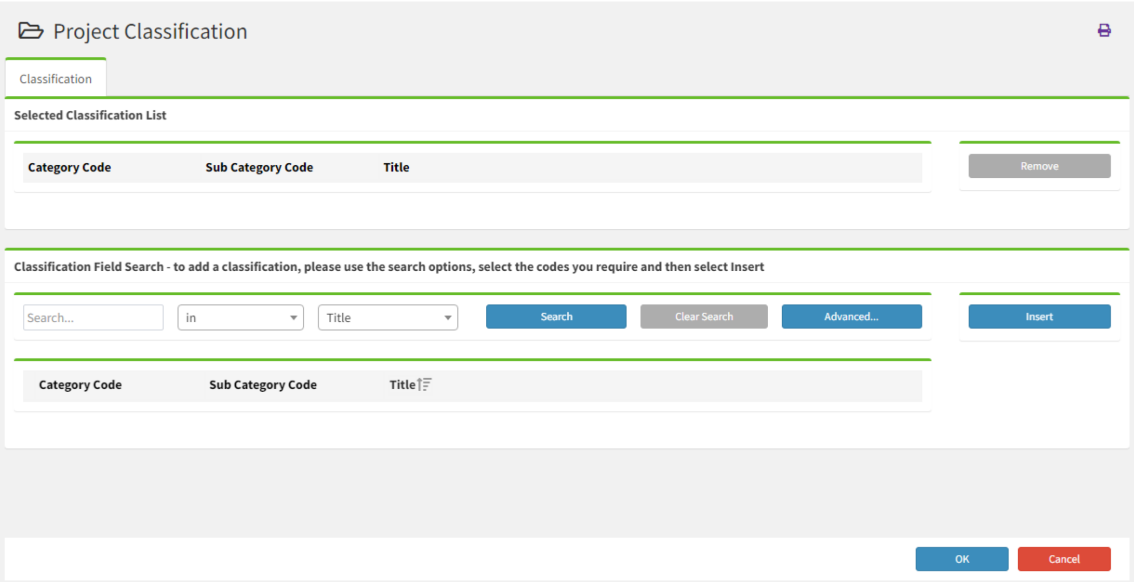
- Notes: - Area to record additional information about the project.
  Note: You can utilise standard text from the library by clicking 'Standard Text. Once pulled through into the qualifications tab, it can be modified as required.

Template Details tab

- This tab will be used to populate the Activity Log fields. The Activity Log is used to recordmore specific project data regarding the procurement process being ran.
- Please complete all mandatory fields but come back and populate further information as theproject progresses. To update the fields after the project has been created, click 'Edit Project' and then access the 'Templates Details' tab.

Classifications tab

- **Business Classifications**: The Business Classifications is for the purposes of publication to the supplier portal. Select 'Search' and then use the 'Field Search' option to add all applicable classifications
  Note – once you have found the classification(s) you want to add, click 'Insert'.



Customers tab

- If you have selected additional customers/departments on the 'Details' tab, you can now select the additional customers involved in the project. Select as many customers/ departments as required.
-

Website tab

- **Automatically accept an expression of interest**: - Setting to determine whether expressions of interest from suppliers are manual or automatic. This will be greyed out by default.
- **Automatically publish first stage documents upon receipt of an expression of interest**: -Setting to determine whether the first stage documents are manual or automatic when a supplier expresses interest in the tender. Leave this ticked
- **E-mail project users when correspondence is received**: - Allows project users to be notifiedby email when suppliers send correspondence messages regarding the project (e.g Clarification questions). Leave this ticked.
- **Send standard correspondence messages**: - Controls this projects ability to send outstandard correspondence (Automated Email Notifications). Tick this.

- **User**: - Allows for a user to be selected that the system will automatically create an actionfor each time a supplier sends a correspondence message. If selected, you can insert a description of the action required by the user.
    - **Show award criteria on supplier web portal**: - Setting to control whether the 'Award Criteria' as defined with the 'Award' tab will be displayed on the supplier portal when theproject is published. If you have set this, tick this option.
    - **Select a user group to be notified when returns are received**: - a DPS return requires evaluating within a set period of time it is advisable to use the returns alert email. This is enabled by assigning a group to the project and when a submission is received, a group of users are notified by email. **Note:** if you are to run a DPS and would like to set up a group of users to receive the alerts,please speak to the system administrators. The activation of the standard correspondence 'Project Return Received' is also required to be activated by the administrator.

Contracts Finder tab

- **User**: - Defaults to the user creating the project (Mandatory to publish the project to Contracts Finder). You can either choose your name of the general Procurement inbox contact.
- **Region**: - Allows a region to be assigned to the contract finder notice (Optional)
- **Value From**: - Used to define the range contract size/value. (Optional)
- **Value To**: - Used to define the range contract size/value. (Optional)
- **Additional information on how to apply for this contract**: - Allows for any further information or instruction to be entered which will populate the 'Other Information'area of the Contract Finder notice.
  Note: The Contracts Finder notice will automatically include the link to the In-tend Supplier Portal. You can also use the standard text to add the 'Contracts Finder' text and then amend accordingly.
- **Delivery Notes**: - Displays on Contracts Finder 'Other Information' if entered (Optional)
- **Funding Type (WEFO or EU)**: - Displays on Contracts Finder 'Other Information' if entered (Optional)
- **Funding Description**: - Displays on Contracts Finder 'Other Information' if entered(Optional)
- **Is SME Friendly?**: - Displays on Contracts Finder if information is entered (Optional)
- **Is a Framework Agreement Type?**: - Displays on Contracts Finder if information is entered (Optional)
- **Is a Recurrent Procurement Type?**: - Displays on Contracts Finder if information is entered (Optional)
- **Is Nationwide?**: - Displays on Contracts Finder if information is entered (Optional)
- **Is Extension Possible?**: - Displays on Contracts Finder if information is entered (Optional)
- **Is Suitable For VCO?**: - Displays on Contracts Finder if information is entered (Optional)
- **Approach Market Date**: - Required to publish a Contracts Finder Award Notice
- **Awarded Date**: - Required to publish a Contracts Finder Award Notice
- **Annex D Option Type**: - Required to publish a Contracts Finder Award Notice
- **Awarded Procedure Type**: - Required to publish a Contracts Finder Award Notice
- **Reason Contract Lawful**: - Displays on Contracts Finder if information is entered (Optional)
- **Contracts Finder Reference**: - Contains the finder reference link when the Project has been published on Contracts Finder
  Note: The Contracts Finder Reference will be visible in the Project Summary screen after

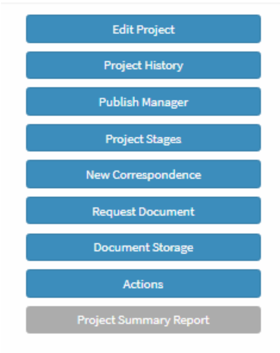
successfully publishing the tender on Contracts Finder. Clicking the link will automatically take the user to the Contracts Finder notice.
Note: If you're operating an Open Framework, you will need to use a different project reference to submit an updated Contracts Finder notice, as you are only able to submit on notice per project.

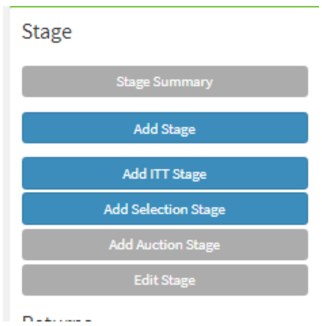
Saving the project

- Once you have entered the required information into each tab, click 'Ok' and the project will be created.
- The page will refresh, and you will be taken to the Project Summary page. The referencenumber will be automatically assigned and will be displayed on screen (below).
  Note – you will also see the project workflow on screen, which shows you the projectjourney and each element you have completed. Once you start to complete differentelements of the project, you will see more red circles turn to green.

2. Adding a Stage

- After the project has been created the stage should be set up.
- To create the stage, access the stage administration by selecting the 'Project Stages' from the 'Project Summary' screen.
- Click the 'Add Stage' button to open the Create New Stage window.





Overview Tab

- **Title:** - The stage title should be entered. E.g., 'DPS / Framework Qualification'
- **Project:** - This will be pre-populated.
- **Type:** Select 'Selection Stage' from the dropdown.
- **Information purposes:** - leave this unticked.
- **Allow modifications to the document set:** - Leave this ticked.
- **Allow document set revisions to be viewed on the portal:** - Leave this ticked.

Details Tab

- You can add any details of the stage which you want suppliers to view.

Receipting Tab

- **Return date**: - You can set the stage return date and time.
  - **DPS –** you can either enter the end date of the DPS or the round deadline. This will

depend on how the DPS is being operated. If you're operating the DPS in rounds, you will be able to update the return date after the first round has closed to align with any subsequent rounds which are ran. To do this, on the 'Receipting' tab withinthe 'Stage' click on 'Change Return Date'. You can then set an updated closing date/ time.
    - **Framework (Closed) –** enter the return date and time for the stage i.e. the submission deadline.
    - **Framework (Open) –** enter the return date and time for the stage i.e. the submission deadline.
- **Lock date**: - You can set a lock date and time for the stage, so submissions cannot be accessed before this date.
    - **DPS –** if you're accessing DPS submissions as so as they're received, don't enter a lock date. This will allow you to perform an opening ceremony at any time. Alternatively, if you're operating the DPS in rounds, you may want to enter this so you can only access the submissions on a certain date.
    - **Framework (Closed) –** enter the date / time which mirrors the return date and time.
    - **Framework (Open) –** enter the date / time which mirrors the return date and time.
- **Deadline for clarifications**: - You can also set a deadline for clarifications, if required. Suppliers can still send questions in after this date.
- **Remind suppliers about return closing dates: -** You can choose to remind the suppliers about the closing date. Again, probably not advisable with a DPS, but may be useful for a framework.

Notes Tab

- You can add any notes against the stage, but it's not mandatory.

Opening Ceremony tab

- **Settings**:
    - **Open using a formal opening ceremony (password)**: - Tick this option.
    - All other options within the settings area do not need to be selected.
- **Remote Opening**:
    - Do not select any of these settings.
- **Returns**:
    - **Allow multiple returns**: - tick this option for all. Allows the supplier to modify their return.
    - **Allow returns after the stage return / date**: - This option allows returns after the stage return / date has passed. Leave this unticked.
        - **DPS** - Don't tick this option, as you will either access submissions as they are received or at the end of the round. If accessing submissions at the end of the round you will update the stage return deadline for any subsequent rounds which are ran.
        - **Framework (Closed)** - Don't tick this option.
        - **Framework (Open)** - Don't tick this option.
    - **Allow returns after the opening ceremony**: - This option allows suppliers to submit returns after the opening ceremony has been completed.
        - **DPS** – If you're accessing the DPS submissions as soon as they are received, you can leave this option unticked as your stage return / date will be the endof the DPS. However, if you're operating your DPS in rounds, you will need to tick this option. This allows submissions to be

made after the initial submission date / time has passed (which will need to be updated as subsequent rounds are run).
        - **Framework (Closed)** - Don't tick this option.
        - **Framework (Open)** - Don't tick this option.
    - **Automatically open returns when received**: - Leave this option unticked for all scenarios.
    - **Alias supplier name until opened**: - The supplier's name will be hidden until the opening ceremony has been completed. Leave this option ticked for all scenarios
- **Standard Correspondence**:
    - Do not select any of these settings.

Supplier Bid tab

- **Tender value: -** This field allows the supplier to enter a tender value on screen when they submit their return. 'Not required' will be selected by default.
- **Opting in:** - Leave the option selected so the supplier must specify if they are going to submit.

Workflow tab

- You can add documents to the stage which requires other stakeholders to input into them. You can set actions and assign tasks to users.

Lots tab

- If your project uses lots, you can add them here. If multiple lots have been setup within the DPS or Framework approved supplier list, then the lots will be visible here.
  Note: If you need to amend any of the lots for a DPS or framework, go back to your approved supplier list, amendand the changes will be reflected in this tab.

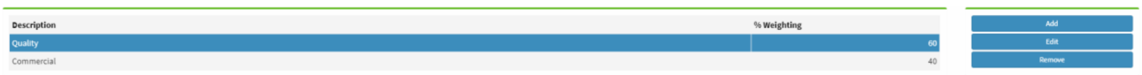
Envelopes tab

- Envelopes are not being used by WNC (we use placeholders), so this tab can be ignored.

Evaluation tab

- If you need to create an award questionnaire, you can add your evaluation criteria e.g. Quality, Price and Social Value by selecting 'Add'. You can also add weightings and then build your evaluation questions.
- The evaluation questionnaire is to only include your weighted award criteria questions e.g. quality, price and social value (may not apply to a DPS).
- You do not need to build your evaluation questions in one go. To continue building / editingyour award questionnaire, you can access this by clicking on 'Evaluation Setup' from the
  'Stage Summary' page.
- If applicable, you can still add your SQ and Declaration questionnaires, but you will import these via the documents tab on the 'Stage Summary' screen.
- When the stage has been created all the relevant documents should be uploaded within thedocument set, including any required placeholders.
  Note – to understand how to create your SQ questionnaire for your project, please see section 4 – 'Creating your Selection Questionnaire (SQ)'.
- **Completion Date for Evaluation**: select the date and time for the evaluation to be completed. This includes the moderation.

- **Default points for questions**: this is the default scoring if you were to use auto-scored questions
- **Evaluator Reason Mandatory:** ticking this makes comments mandatory against each question. Tick this.
- **Remove evaluators' responses once moderated:** This deletes the original scores / weightings of the evaluators. Leave this unticked.
- **Evaluators have access to the evaluation summary:** Leave this ticked. This is their own evaluation summary. They won't be able to see other evaluators scores / comments.
- **Questionnaire:** this is your questionnaire title e.g. Award Questionnaire. You may find this auto-populated with the title 'Response to Requirements' but you can overtype this.
- **Action – message to be sent to evaluator:** this is a message you want to appear to the evaluator on screen when they access the questionnaire / submissions.
- **Value Weighting:** You can assign a weighting to the bid value. Enabling the bid value allows the supplier to input a price for their return. If selected the attributed percentage is includedin the overall questionnaire weightings. This may be auto-ticked but untick if not using.
  Note **–** if you use this, the system will calculate the price score based on the following calculation - ***Price / lowest price x price weighting.***
- **Total Points (Evaluation Criteria)**: This sets out the total available points for the evaluation,however, leave this blank as individual question weighting will be used.
- **Description**: this is where you can add your section weightings and confirm their weighting e.g. Price (43%), Quality (60%), Social Value (10%). Click 'Add' to add your section and select from the drop-down e.g. Quality and assign the weighting. Click 'Ok' or 'Another' to add additional criteria.
  Note – the weightings of all sections must total 100%.
  Note – if you use the 'Value Weighting', that weighting contributes to the overall total. For example, if your value weighting was 40%, the sections you add beneath would need to total 60% for the overall 100% total to be achieved.



- **Pass score (Evaluation Criteria):** You can also set a pass score (%) for the evaluation criteria,however, this looks at the pass score (%) across all sections e.g. Quality, Price and Social Value as opposed to an individual section. Leave this blank.
- **Hide Model Answers from Evaluators:** If they are being used, you can hide model answers from evaluators.

Reminders tab

- You can set any reminders for the stage, if required.

Snapshots tab

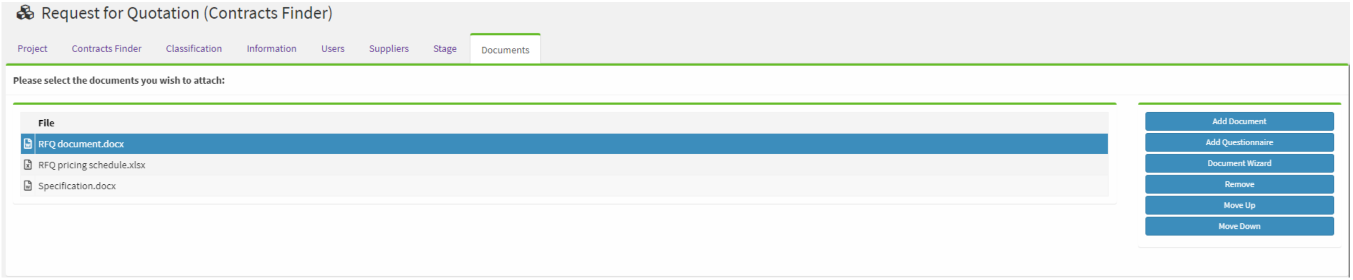
- Throughout the project, certain snapshots can be added and viewed.

Documents Set

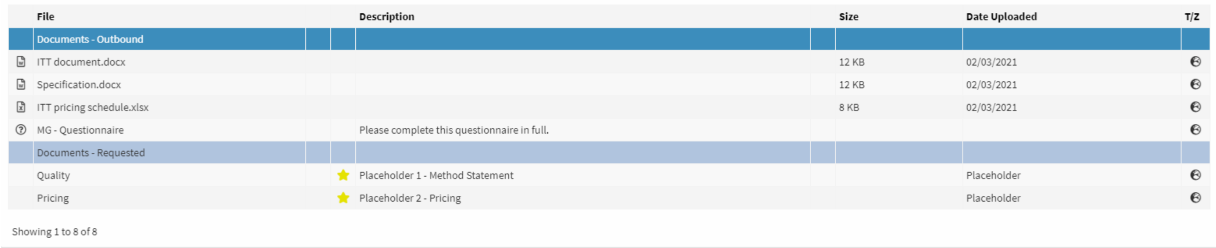
When you see reference to 'documents' and the 'document set', this refers to the documents you upload for the supplier to access e.g., DPS guidance document, specification and pricing schedule, but also to any pre-built questionnaires you pull into your project from the library of questionnaires or placeholders which you create.

To access the ‘Documents Set’ area, from the main project summary, click on ‘Project Stages’, then ‘Stage Summary’ and ‘Document Set’.

- **Add Document**: This will allow you to add your tender documents (e.g. ITT, pricing schedule,specification etc) against your opportunity. Suppliers will be able to access these after they express interest.
  Note – you can upload a maximum of 5 documents at a time, with all file types allowed via the ‘Add Multiple Documents’ tab.
  Note - you also have the option of moving documents up and down in the order.



- **Add Questionnaire**: This allows you to pull through pre-built questionnaires for the supplierto complete e.g. the SQ and the ITT Declarations e.g. Collusive Tendering Certificate etc.
  Note – you can undertake pass / fail scoring of the questionnaires once returned via the ‘Returns Assessment’ area found on the ‘Supplier Returns’ screen.
- To add a questionnaire, click ‘Add Questionnaire’. A pop-up box will then appear for you to be able to select the pre-built questionnaires. Locate the SQ questionnaire you have createdand click ‘Ok’. The page will refresh, and the questionnaire will be added into the document set. You can also add the ‘Declarations’ questionnaire.



- **Document Wizard**: This allows you to pull documents through from other projects / stages but can be ignored.
- **Add Placeholder**: This will allow you to add placeholders for suppliers to upload their completed documents.
  - **Description**: Enter a description e.g. ‘Please upload your completed pricing document’.
  - **This document must be included in the return**: Ensure you tick this as this makes itmandatory.
  - **Document Type**: Select from the available pick list. This just categorises the document being provided.
    Note – it is important that when creating your pricing placeholder, you **must** select ‘Pricing’ from the available dropdown. This will ensure that the evaluators cannot access the pricing schedule when they undertake their independent evaluations.
  - **Allow suppliers to upload non-placeholder documents when using placeholders**: This will be ticked by default. Untick this unless you want to allow suppliers to be able to upload additional documents outside of the placeholders.

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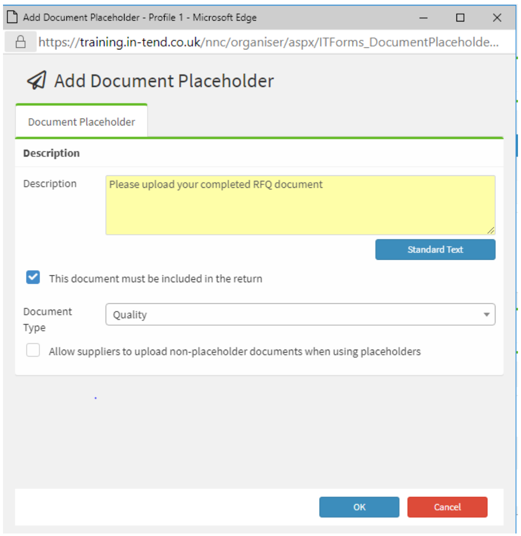
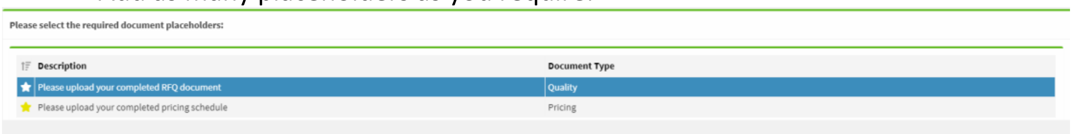
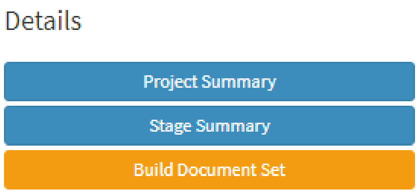


- Click ‘Ok’.
- Add as many placeholders as you require.



Note – the yellow star indicates the placeholders are mandatory.
Note – you also have the option of moving placeholders up and down in the order.

- Once you have finished adding all of your documents, questionnaires and placeholders, you **must** click ‘Build Document Set’. Failure to do so will result in the supplier not being able to see these on the supplier portal once your project is published.

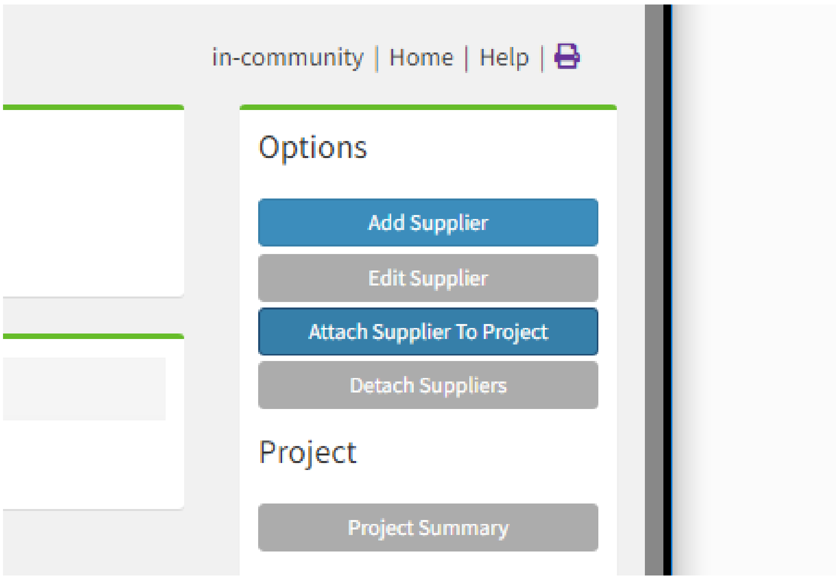


- You must also build your document set before you’re able to publish your project.

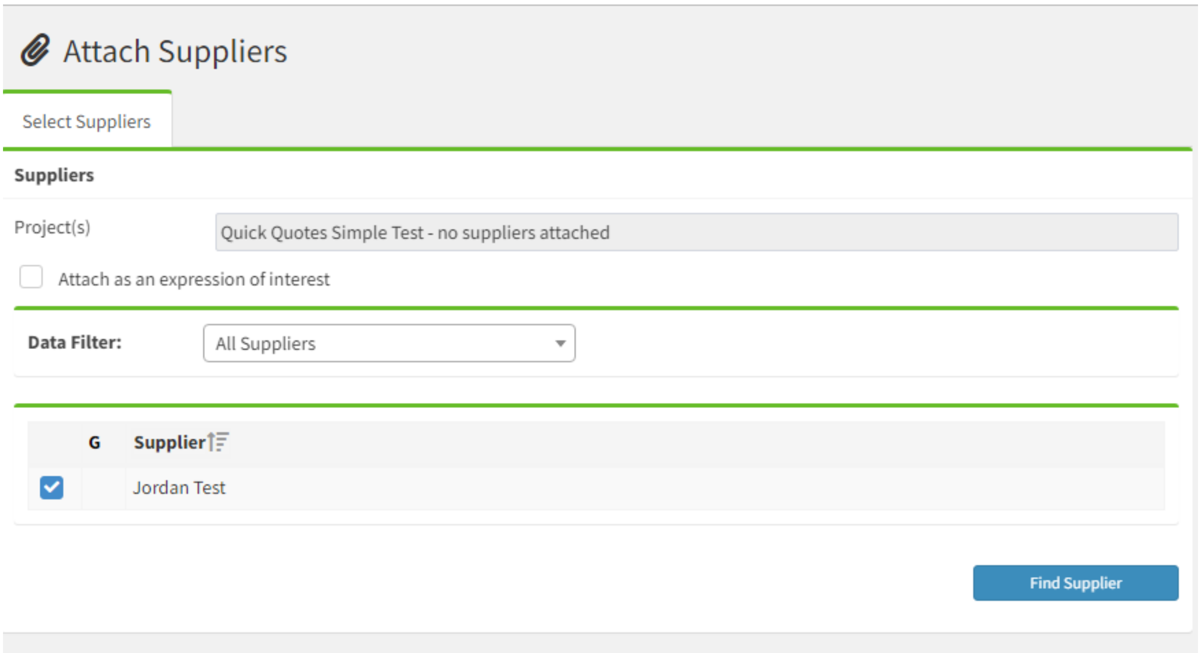
- Should you need to amend the stage settings at any point, from the ‘Project Summary’ page, click‘Project Stages’ and then ‘Edit Stage’.
- Once the stage is added, you can then continue to draft your online questionnaires and submit yourContract Notice, if required.
- If you need to add any award criteria into your project, click ‘Evaluation Setup’ from the ‘Stage Summary’ page.

Attaching Suppliers to Project

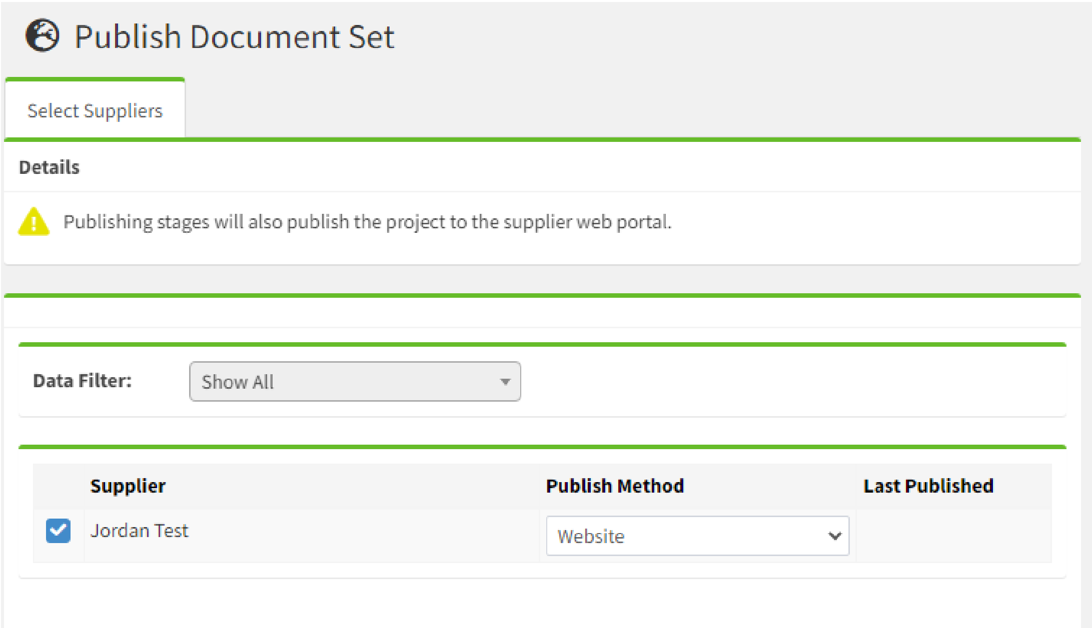
- You can attach suppliers to the project to participate and gain access to the opportunity.
- To edit your attached suppliers, on the project summary screen, click on ‘attached suppliers’ and then “attach supplier to project”. This will allow you to search for the relevant suppliers you wish to add.
- **Note** – You can only attach suppliers once they have registered.



- Leave the ‘attach as an expression of interest’ option unticked

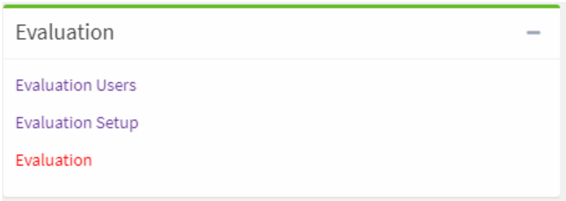


- If the opportunity has already been published, you will then be asked to publish the document set to the additional suppliers. Tick all suppliers you wish attach and click ‘next’.



3. Adding Award Criteria (Quality , Price and Social Value)

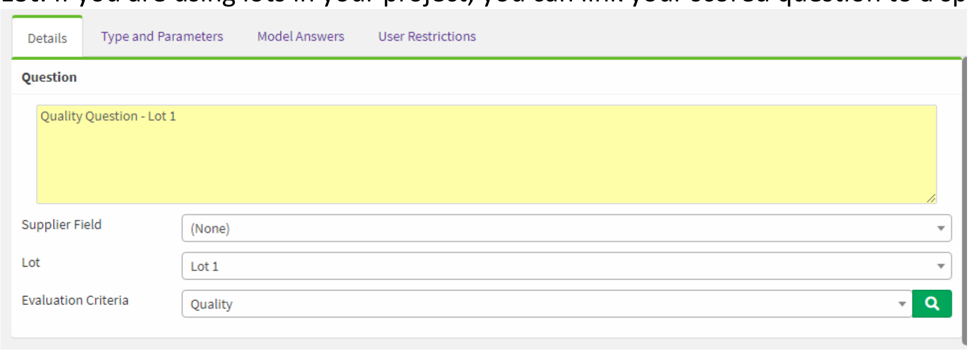
- To add your scored criteria, within the 'Stage Summary' page, click on 'Evaluation Setup'.



- If you click 'Add Question', a pop-up window will appear and you will be able to start to build your evaluation question, completing different tabs.
  Note – if you are operating your project in Lots, you will build all scored criteria for all lots in the 'Evaluation Setup' area. When building your questions, you will then link the individual questions to the relevant lot they relate to.

Details tab

- **Question**: Enter your evaluation question, including description.
- **Supplier Field**: You can link the answer to a pre-populated supplier field from their supplier account.
- **Lot**: If you are using lots in your project, you can link your scored question to a specific lot.



- **Evaluation Criteria**: Link your question back to the section created e.g. Quality, Price, Social Value etc.

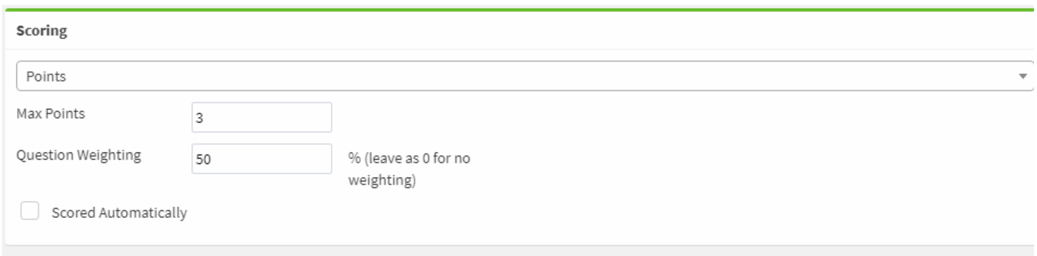
- **Does the supplier answer this question**? Unless this question is for internal staff, leave as supplier question.
- **Footnote**: Enter any further question guidance e.g. supplier help. If the question is a pass / fail question, you must make that clear in the footnote.
    - Note – the section / question weightings are not visible to the supplier on screen when they complete the evaluation questionnaire, but you could confirm the weighting in the footnote.
    - **Position**: the position order will be greyed out as it's the first question, but you will be able to manage the order when you add the second.

Type and Parameters tab

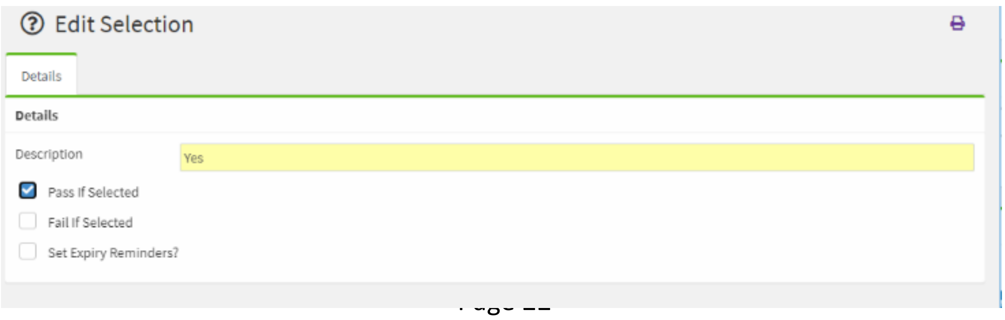
- **Type**:
    - **Simple text** – allows you to set a **character** limit and provides a text box for the supplier to type their answer into.
    - **Memo** – allows you to set a **word limit** and provides a text box for the supplier to type their answer into.
    - **Selection** – allows you to create a single or multiple-choice selection question. The supplier can select either a single option or multiple answers from a list of options.
    - **Description** – like a note, but you can't answer it as a supplier as it's not an actual question. The description can be used as section headers e.g., QUALITY or PRICE etc.

  Note – you're not able to create evaluation questions which are attachment questions, so you need to create placeholders to allow suppliers to upload their completed method statements / pricing schedule.

  Note **-** When you build your evaluation questions, for questions which require an attachment to be provided, create a mandatory question which is a single selection (parameters). The single selection could say – 'I have uploaded method statement 1 against the required placeholder' or 'I have uploaded my completed pricing schedule against the required placeholder'. This then gives the supplier one option to select and as the question is scored / weighted, it can be evaluated.
- **Mandatory**: Select whether the question is mandatory.
- **Validation**: You can force the supplier to enter their answer in upper case.
- **Scoring**:
    - You can either score the question as points (e.g. 0-4). If selecting 'Points', you can set the maximum points (score) that question can be given. You can also set the weighting of the question e.g. 50%.

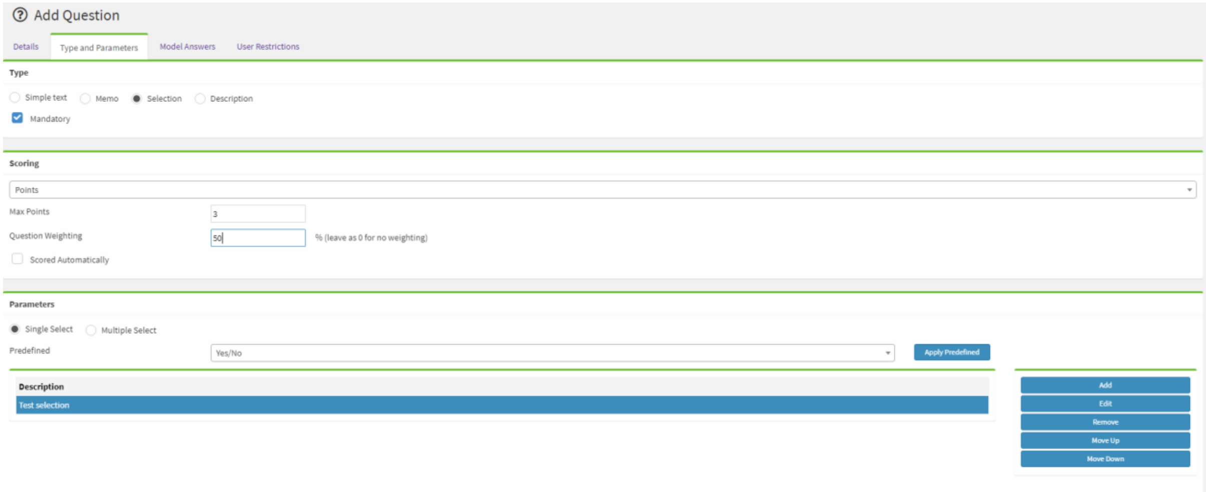


    - You can create a pass / fail question. You can also configure as to whether it will be scored automatically e.g. Yes = Pass and No = Fail.



- **Parameters**: This allows you to set the parameters for each question. depending on the type of question you build, the available parameters will differ.
- **Pre-defined**: This appears when you select a 'Selection' question'. It allows you to select from a pre-defined list of answers (Yes/No or Pass/Fail). Click 'Apply Predefined' if you wish to use these. You can also create your own by clicking 'Add'. Ticking add will allow you to specify the selection (free text). Click 'Ok'.

This example shows you the drafting of a mandatory selection (type) question, to be scored on points (max 4), with a weighting of 50%. A bespoke option has also added 'Test selection'.



Model Answers tab

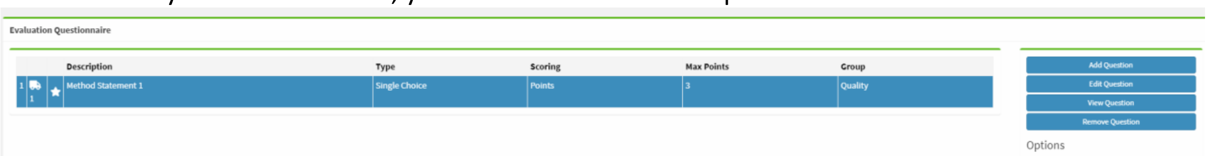
- You're able to also add model answers with minimum and maximum points.

User Restrictions tab

- You can select the users to restrict the item (question) to, based upon their evaluation involvement.
- If applicable, select the user and click 'Ok'.

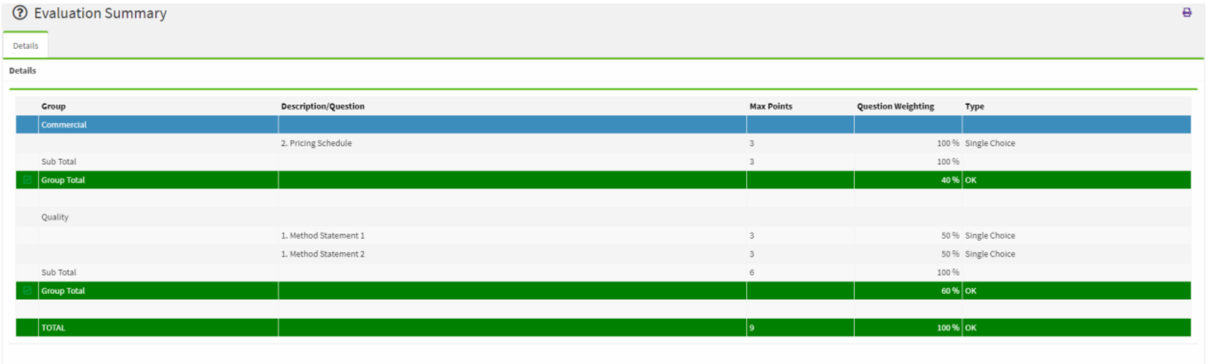
Saving your question

- Once you have done this, you can click 'Ok' and the question will be created.



- **Note** – the star indicates that the question is mandatory.
- Continue to add 'Add' as many questions as required, connecting them to the relevant criteria (Quality / Commercial), selecting whether they are mandatory, scored on points or pass fail, setting the parameters and if applicable, creating the options.
- **Summary**: Once you have created your questions and assigned them to the relevant criteria, if you select 'Summary', you can ensure that all of the weightings add up.

In this example, you can that both the Commercial and Quality sections added together total 100% and all questions in each section total 100%. If the weightings didn't add up, you would see this in red.



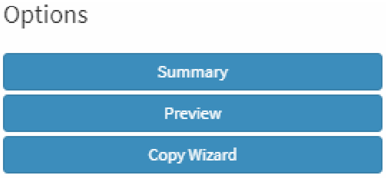
Evaluation Summary

Details

Details

Group	Description/Question	Max Points	Question Weighting	Type
Commercial				
	2. Pricing Schedule	3	100 %	Single Choice
Sub Total		3	100 %	
Group Total			40 %	OK
Quality				
	1. Method Statement 1	3	50 %	Single Choice
	1. Method Statement 2	3	50 %	Single Choice
Sub Total		6	100 %	
Group Total			60 %	OK
TOTAL		9	100 %	OK

- **Preview**: you to see what the supplier would see when they come to complete your questionnaire. Click ‘Preview to test it before you publish it. You can then make any amendments required by clicking ‘Edit Question’.



- **Copy Wizard**: Allows you to import questions from other projects / evaluation templates (acts like a library of questions) to then amend them for use in your own project. Once imported you can then edit the questions as you wish.
- **Move Up**: Moves your question up in the order
- **Move Down**: Moves your question down in the order.
- Note – When creating a question, it will appear at the bottom of the list. Use the move up and move down buttons to adjust the order.
- **Include Rejected Suppliers Display**: Leave this unticked. This will ensure that no rejected suppliers show on the evaluation screen.
- **Include Rejected Suppliers Calculations**: Leave this unticked. This will ensure that no rejected suppliers will have their calculations included on the evaluation screen.
- Click ‘Next’.

4. Creating your Selection Questionnaire (SQ)

- For each project, you are required to create your own SQ Part 3 questionnaire. You can create a new questionnaire containing not scored, automatic pass / fail or automatic scored questions.
- A prebuilt questionnaire can be used for SQ Part 1 and Part 2, and Declarations.
- You can then undertake an assessment via the ‘Returns Assessment’ area – see the ‘Accessing Bidder Returns’ section to see which suppliers have passed / failed before you then accept or reject them.
- Accepted suppliers can have their quality and price element of their submission evaluated.

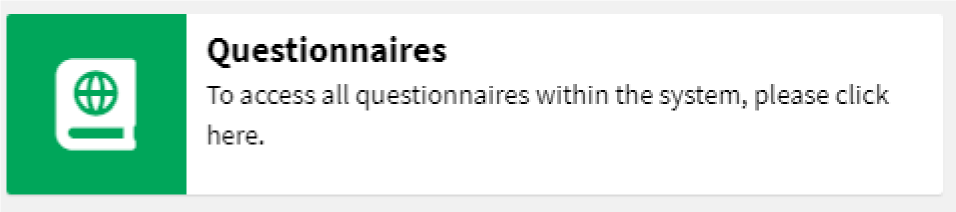
Adding a Prebuilt Questionnaire (SQ Part 1 & Part 2 / Declarations)

- Questionnaires entitled ‘WNC SQ - Part 1 & Part 2’ and ‘Declarations’ have been prebuilt with a pre-applied scoresheet for people to use when creating their projects.
- You will need to add this prebuilt questionnaire to the project ‘document set’.
- To access the ‘Documents Set’ area, from the main project summary, click on

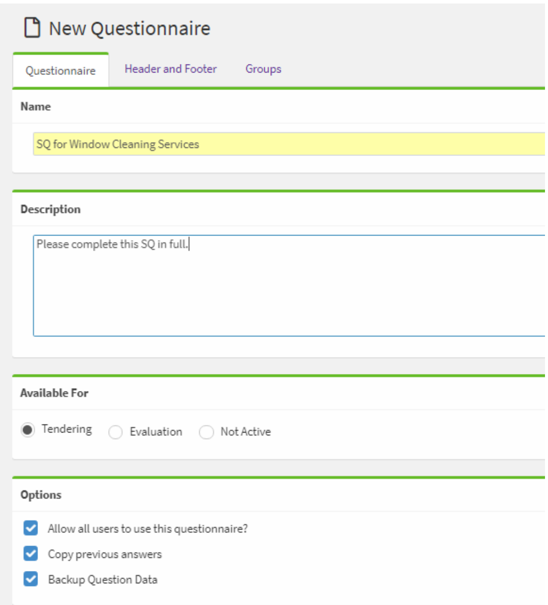
'Project Stages', then'Stage Summary' and 'Document Set'.

Adding a New Questionnaire (SQ Part 3)

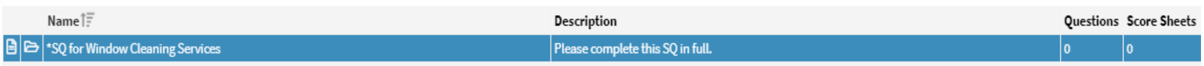
- To access the questionnaires area, click on the 'Questionnaires' button from the home page.



- To add a new questionnaire, click 'New Questionnaire'
- Give your questionnaire a title e.g., 'SQ Part 3 for Window Cleaning Services'.
- You may also enter a questionnaire description; however, this is not mandatory.
- Within 'Available For' select 'Tendering'.
- **Note** – it is vital that you insert the project name in the questionnaire title, as all questionnaires used on all projects will be kept in the team questionnaires library.

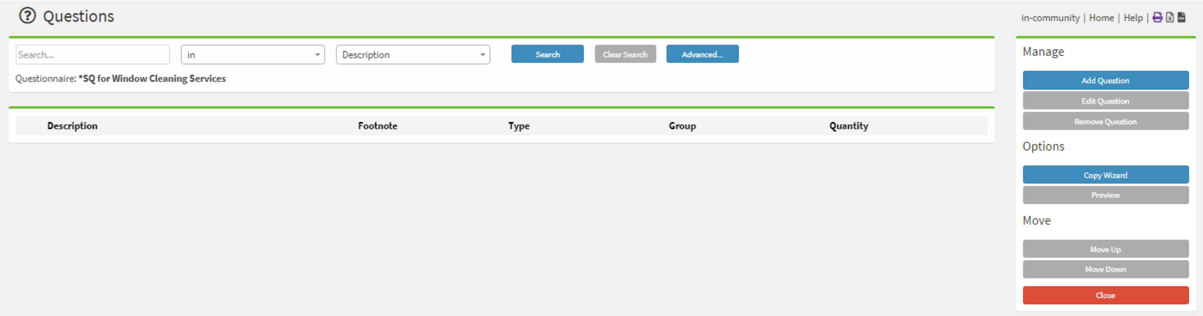


- Select the options for 'Copy previous answers' and 'Backup Question Data' – this relates to the supplier. Leave the option ticked for 'Allow all users to use this questionnaire'.
- You can also add a header and footer on the second tab.
- On the 'Groups' tab, leave these options unticked.
- To create your questionnaire, click 'Ok'.
- From the Questionnaire list, select the Questionnaire you have just created.
- The system will tell you that you have no questions and no score sheets added.

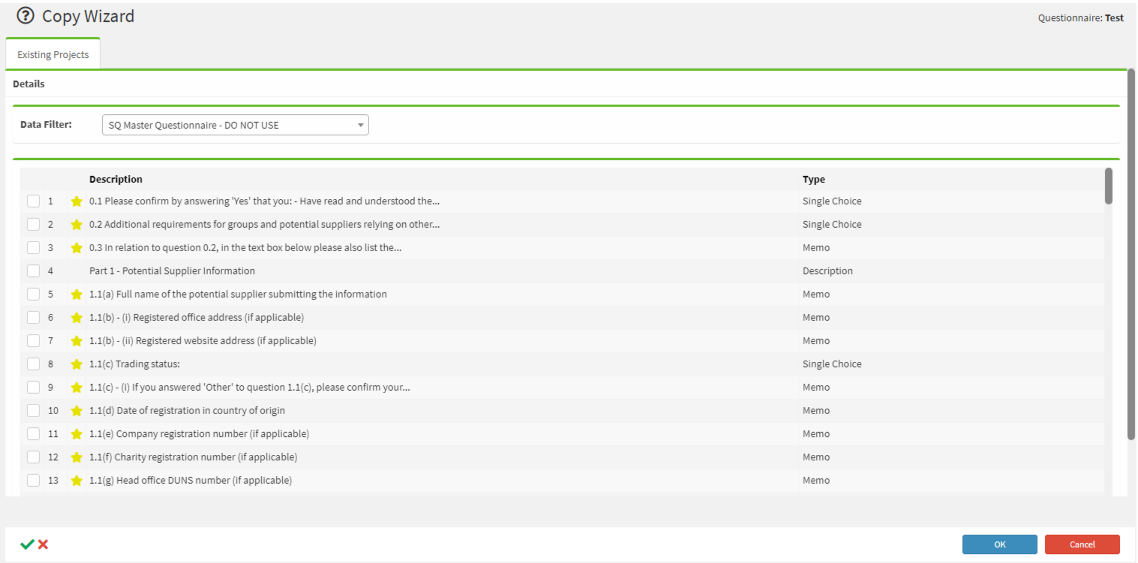


Adding standard SQ Part 3 questions to your questionnaire

- A questionnaire entitled '*WNC Selection Questionnaire (SQ) - Part 3 - TEMPLATE / DO NOT DELETE' has been created to store the SQ questions for people to use when creating their projects.
- **Note** – please do **NOT** edit, use, complete or remove this questionnaire. The questionnaire has been created to allow people to select questions from it, to then use in their own SQ questionnaires. Additional SQ questions may be added over time by the administrator.
- To access your questionnaire, double click on the title and the following screen will be displayed.



- To add questions from the master SQ questionnaire, please click on the 'Copy Wizard' button.
- You will then be able to see all the available SQ questions within the ''*WNC Selection Questionnaire (SQ) - Part 3 - TEMPLATE / DO NOT DELETE".



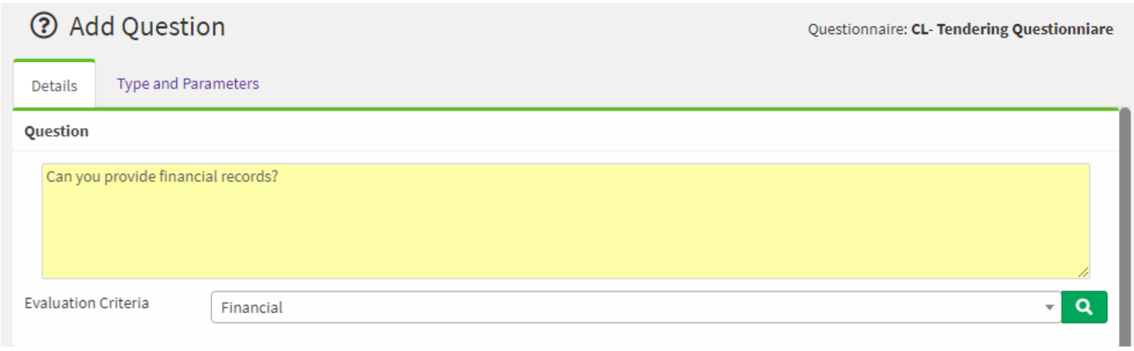
- You can either select questions individually or as a group to be pulled through into your questionnaire.
- Once you have selected all the questions you wish to add, click 'Ok'.
- **Note** - to select all questions in the master questionnaire, click on the green tick and to deselect all, click on the red cross.
- Once you have clicked 'Ok', the page will refresh, and the questions will have been added into your questionnaire.
- If you need to amend the order of the questions, you can click 'Move Up' or 'Move Down'.
- You can also edit any of the existing questions, by either double clicking on the question or selecting the question and clicking 'Edit Question'.

- You will then be able to edit the question wording and parameters.
- **Note** - you cannot set whether the SQ questions are automatic pass / fail here, but you do this when you assign the score sheet (below).
- If you need to remove any questions you're either created or pulled through via the copy wizard function, you can remove them by clicking 'Remove' question'.
- **Note** – there are 'central government'

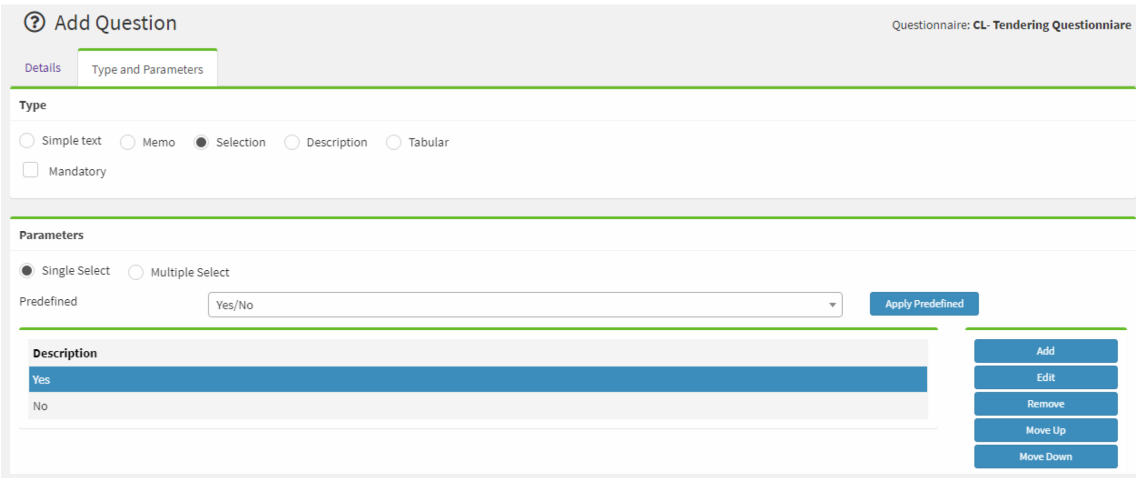
Adding SQ Part 3 project specific questions

- To add any project specific questions to your SQ, within your questionnaire click on 'Add Questions'.

- Add in the Question and select Evaluation Criteria (select from the drop down list).



- Add the question parameters, you have the option of Simple Text, Memo, Selection, Description (like a note) and Tabular.



- Add other questions as required or when all questions complete click 'Ok'.
- Return to the main Questionnaire page.

Previewing your SQ Part 3 questionnaire

- To preview your questionnaire and to see what the supplier will view when they come to complete your SQ questionnaire, click 'Preview'.

- You will be able to see and answer all questions in your questionnaire to ensure it flows correctly.
- **Note** – you can preview your questionnaire at any time, even when it is completed.
- Once you have previewed the questionnaire, click 'Close'.
- You will then be returned to the list of questions added.

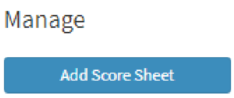
Marking your SQ Part 3 questionnaire complete

- Once you have added all your questions and the questionnaire is ready to be used, click 'Close'.
- To mark your questionnaire complete click 'Complete'.
- **Note** – once you click 'Complete' you **CANNOT** amend your questionnaire. The only way for you to amend the questionnaire would be to take a copy of this, amend it and click complete again.

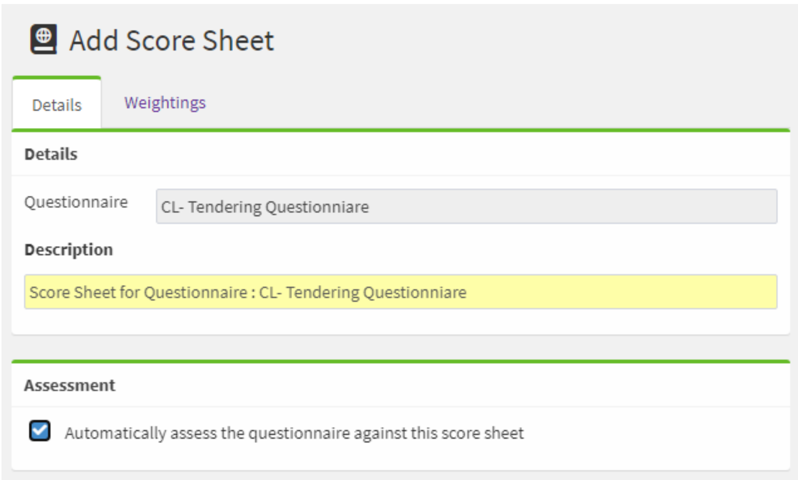
Adding a Score Sheet

- For 'tendering' questionnaires i.e., the SQ, you must add a score sheet so that when the supplier answers all of the questions, the system can undertake the automatic pass / fail checking for you.
- To add a score sheet, click on 'Score Sheets'.

- Click Add Score Sheet



- Click on the tick box 'Automatically assess the questionnaire against the score criteria' if you want the system to assess the answers provided for you to the auto pass / fail questions.

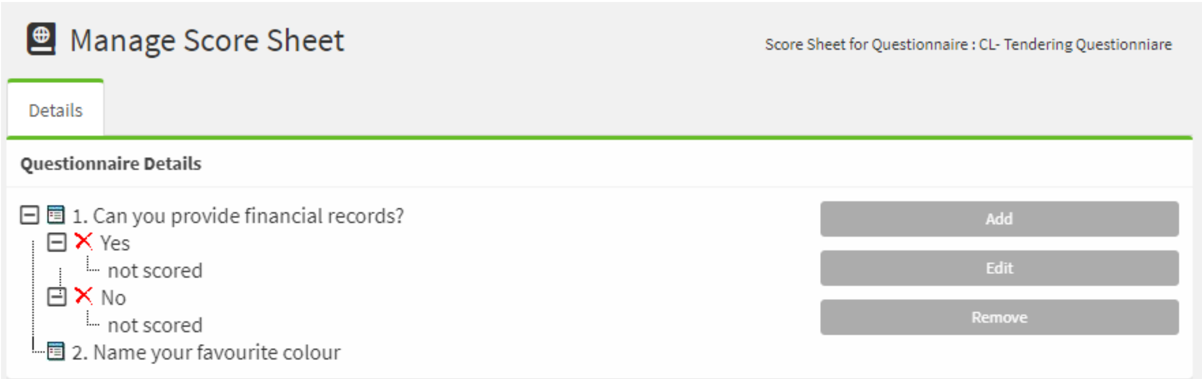


- If applicable, select the 'Weightings' tab to add any weightings to your questionnaire.
- To return to Questionnaire Score Sheet page, click 'Ok'.

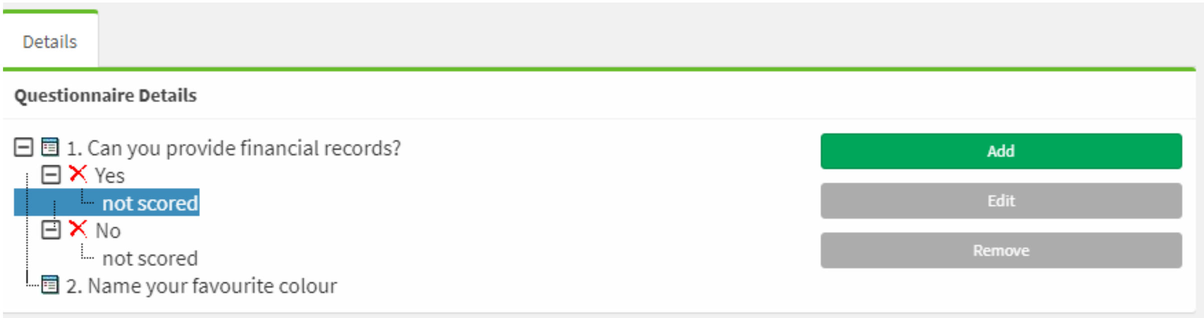
Managing your Score Sheet

- Once you have added your scoresheet, you need to configure this.
- To manage your scoresheet, click on 'Manage Score Sheet'.

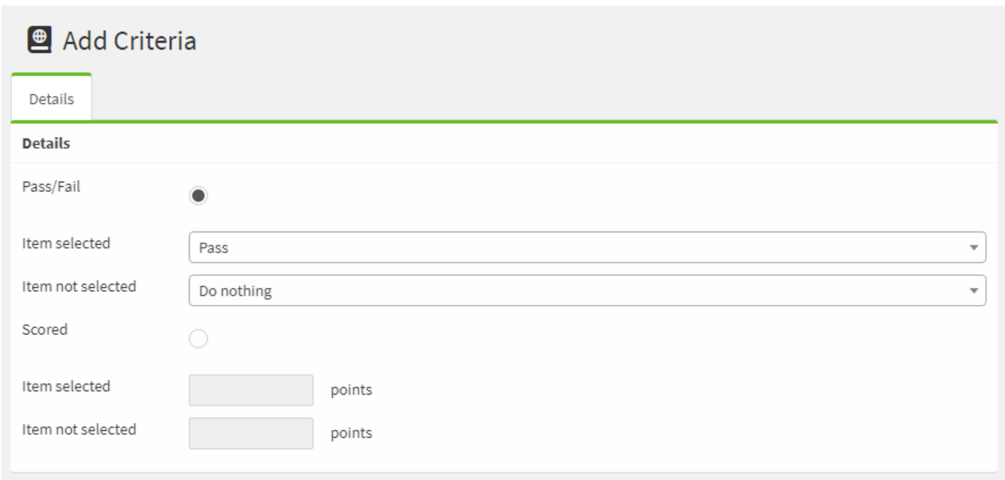
- For the questions, which require you to add automatic pass / fail consequences, click on the 'not scored' option against the relevant option.



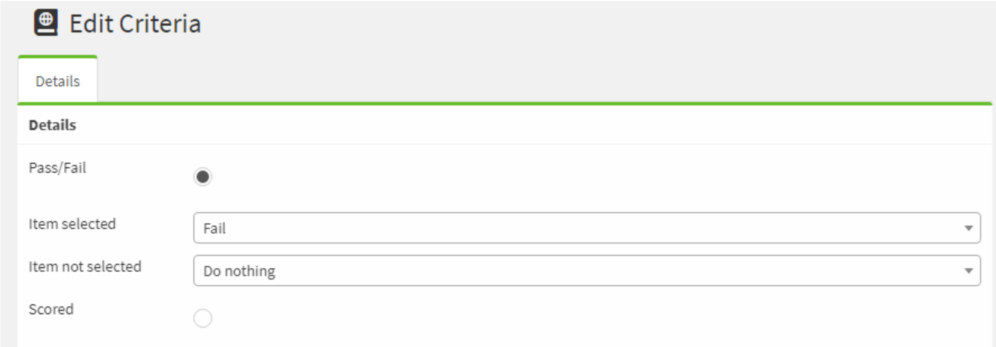
- To set the criteria for that option, click on the 'Add' button which is now green.



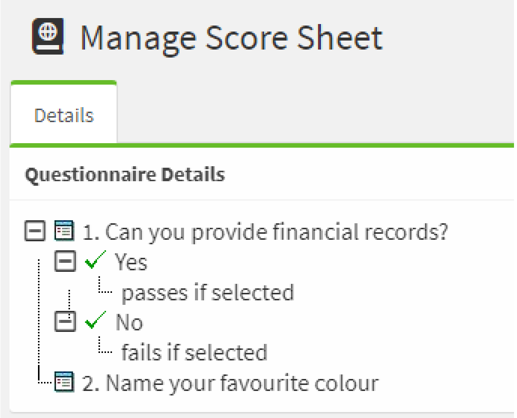
- You can then set your criteria if the item is selected e.g., selecting 'Yes' results in a 'Pass'.



- You can also set the criteria if the item is not selected, e.g., do nothing.



- You can also add scored criteria, so if the item is selected or not selected. For example, the supplier achieves 4 points for selecting the option, but 0 points for not selecting it.
- Once you have set the criteria, click ‘Ok’.
- This has now changed within the Score Sheet.



- Add criteria for all automatic pass / fail questions as required.
- **Note** – if you need to edit or remove any of the criteria, you can select the relevant option and then click ‘Edit’ or ‘Remove’.
- Once you’ve set the pass / fail criteria for all automatic pass / fail questions, you can now add the SQ questionnaire to your project for the supplier to complete.
- **Note** – if any questions are not scored, leave the consequence as ‘not scored’.
- **Note** – on the ‘Questionnaire Score Sheets’ page, you’re also able to test the scoring by clicking on ‘Test Scoring’. You can then run through your questionnaire to check it has been configured correctly.

Adding your completed SQ Part 3 questionnaire to your project

- To add your completed SQ Part 3 questionnaire into the project, on the ‘Document Set’ tab, click ‘Add Questionnaire’.
- To access the ‘Documents Set’ area, from the main project summary, click on ‘Project Stages’, then ‘Stage Summary’ and ‘Document Set’.

- You will then be able to locate your SQ Part 3 questionnaire from the list and click ‘Ok’.
- This will then pull your SQ questionnaire into the documents tab to be published.

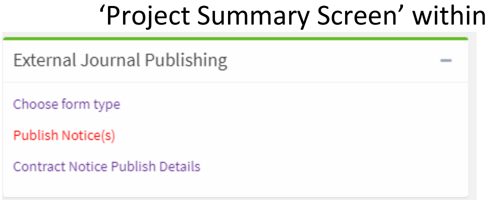
Amending SQ Part 3 questionnaire once project published

- If you're required to amend your SQ questionnaire after your project is published, you need to access the 'Questionnaires' area, take a copy of this by selecting your questionnaire and click 'Copy Questionnaire'.
- Once you've taken a copy of the questionnaire, you can amend the relevant question(s), mark it as complete, assign the score sheet and pull it through into the project on the 'Documents' tab. To do this use the 'Modify Documents Set' function on the 'Stage Summary' tab.
- The system will then allow you to remove the original questionnaire and add the updated version.

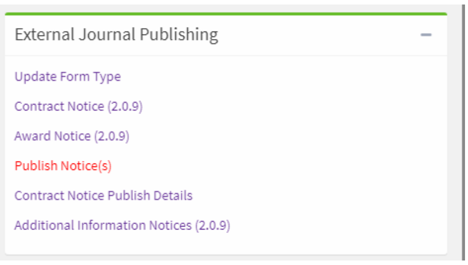
- If you do this, after you have added the replacement questionnaire, please remember to click 'Build document Set', to ensure the new questionnaire is published to the supplier portal.
- **Note** - once you have published your updated questionnaire, please access the 'Questionnaires' area to then mark the previous version of your questionnaire as 'Inactive'. To do this, select your original questionnaire, click on 'Details' and then under 'Available For' change the selection from 'Tendering' to 'Not Active' and click 'Ok.
- Your original questionnaire will then be made inactive.
- **Note** – you may have to refresh the page for the change to take effect.

5. Submitting a Contract Notice to Find a Tender

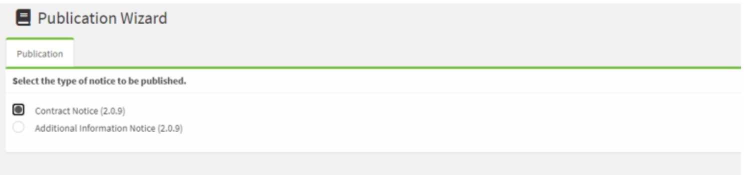
- **Note** – As of 1st Jan 2021, procurement notices from UK Contract Authorities and Contracting Entities are no longer published on TED, with them being required to be published on Find a Tender / FTS.
- **Note** - You can submit the following 'Standard' notice types to Find a Tender via In-Tend:
  - Contract Notice
  - Contract Award Notice
  - Additional Information Notice (Corrigendum)
- **Note** - A Prior Information Notice (PIN) can also be submitted, but this is done outside of a project (see home page).
- **Note** – Submit your notice to Find a Tender before publishing your project on the supplier portal and to Contracts Finder.
- To submit a 'Contract Notice' to Find a tender, please click 'Choose form type' from the 'Project Summary Screen' within the 'External Journal Publishing' area.



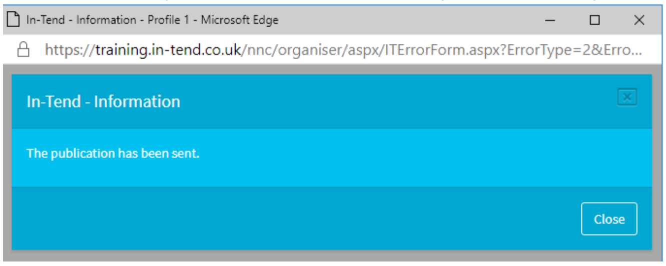
- Once you select 'Choose form type' you will select the standard option.
- Click 'Ok'.
- The page will then refresh and you will be able to select which notice you wish to submit.



- You can click on the notice type e.g. Contract Notice and the system will load the form for you to fill and complete. Mandatory fields will be displayed in yellow, with some information already auto-populated into the notice.
- **Note** – the system will only let you ‘Save’ your notice when all mandatory fields have been completed, on all tabs.
- **Note** – when adding the relevant lot information, you will need to ‘Add’ the CPV code(s) and ‘Select’ the NUTS code(s) as they are also mandatory.
- **Note** – if following the ‘Open procedure’, Section IV.2.7 Conditions for opening tender - is a mandatory field.
- Once you have completed all mandatory information on all tabs, click ‘Save’ and the system will display the ‘Project Summary’ page.
- To submit your notice, click ‘Publish Notice(s)’, selecting the type of ‘Contract Notice’.



- Click ‘Next’ and then ‘Publish’.
- The system will then inform you that the publication has been sent.



- Click ‘Close’ and the system will display the ‘Project Summary’ screen.
- **Note** – you will see the project workflow has updated.
- **Note** – once your publication has been received by Find a Tender, you can select ‘Online Journal Publication Confirmed’ to add the web link to your published notice.

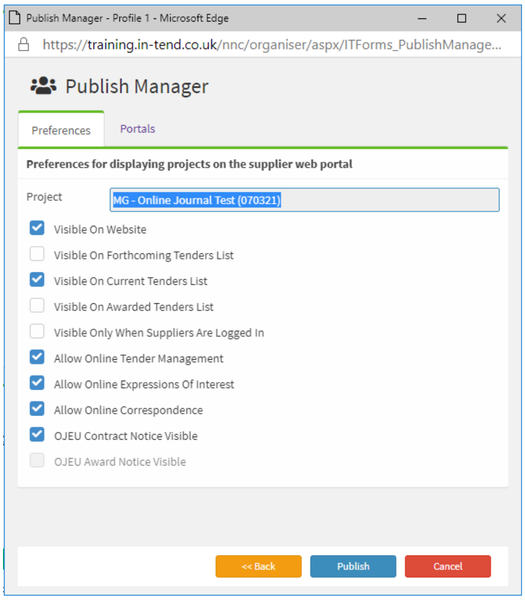
  Online Journal Publication Confirmed

- Once you enter the required details, add any relevant notes, and click ‘Ok’, the project page will refresh, and the workflow will update.
- Now that you have submitted your Find a Tender notice, you can publish your project.
- **Note** – should you need to provide additional information regarding your submitted Contract Notice, you can use the ‘Additional Information Notices (2.0.9)’ option in the ‘External Journal Publishing’ area.

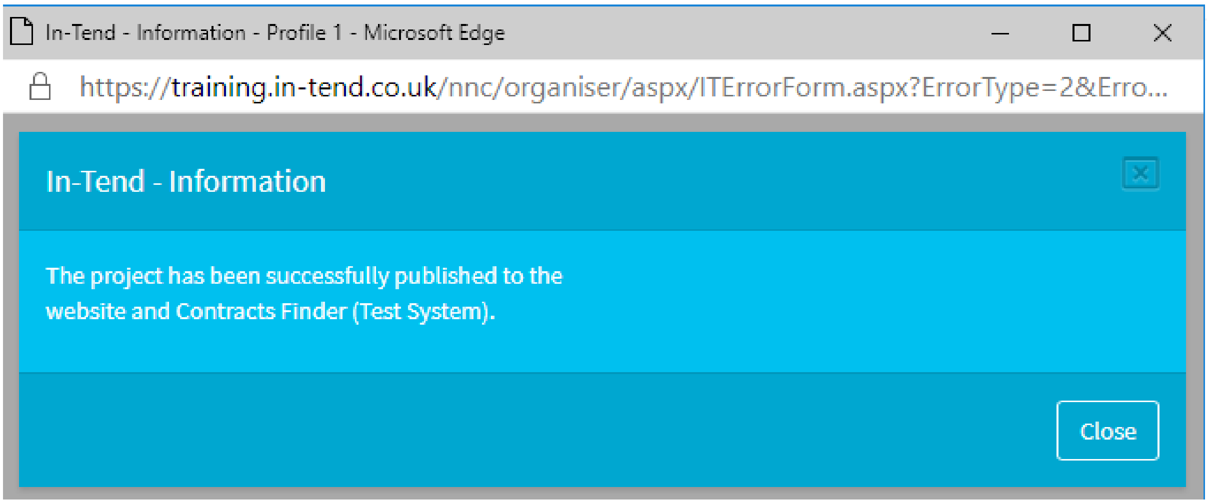
West Northamptonshire Council

6. Publishing the project

- Once you're ready to publish your project, click 'Publish Manager' on the main project summary screen.



- **Note** – you don't need to amend any of the tick box selections on the 'Preferences' tab.
- **Note** – on the 'Portals' tab, tick 'Contracts Finder'.
- Clicking 'Publish' will then publish your project to the supplier portal and to Contracts Finder.



- The page will refresh, and the project summary page will be displayed.
- **Note** – you will see that the published date field will now be populated. You will also see a link to the published Contracts Finder entry.

MG - RFQ 080321

Description	MG - RFQ 080321
Reference	NNC00000114
Project Time Zone	(UTC +00:00) GMT Standard Time
Procedure Type	Open
Send standard correspondence messages	Yes
Published Date	09/03/2021 (Published to Contracts Finder - 09/03/2021)
Link to Contracts Finder	6B93F10B-B175-459E-ADCC-C8E4C7C9554F
Sole Source	No
Return Date	RFQ (07/04/2021 14:57:00)
Customer Name	North Northamptonshire Council
Main Contact	
Award Criteria	(None)

- To view your Contracts Finder advert, click on the link and a new internet tab will open.

Publishing open or closed tender?

- The options you need to select on the publish manager depend on whether you are running an open or closed tender.
- The default values in the publish manager are set for an openly advertised tender, therefore when publishing Closed *(Invited Suppliers ONLY)* tenders, the following fields are recommended:

  -Visible on Website

  -Visible only When Suppliers are Logged In

  -Allow online Tender Management

  -Allow Online Correspondence

Preferences:

- **Visible On Website:** The project will be visible *(somewhere)* on the supplier portal
- **Visible On Forthcoming Tenders List:** The project will be visible on the 'Forthcoming Tenders' area of the supplier portal.
- **Visible on Current Tenders List:** The project will be visible on the 'Current Tenders' area of the supplier portal.
- **Visible on Awarded Tenders List:** The Project will be visible on the 'Awarded Tenders' area of the supplier portal.
- **Visible on User-defined Link:** The project will be visible on the user-defined link area *(licensed)*
- **Visible only When Suppliers Are Logged In:** The project will only be visible when the supplier when they are registered and logged in.
- **Allow Online Tender Management:** The supplier is allowed to upload and and return documents against during the tender.
- **Allow Online Expressions of Interest:** Suppliers may express interest in the tender.
- **Allow Online Correspondence:** Suppliers are able to send correspondence messages.
- **OJEU Contract Notice Visible:** The OJEU Contract Notice will be visible on the Supplier Portal.
- **OJEU Award Notice Visible:** The OJEU Award Notice will be visible on the Supplier Portal.

Portals:

- Allows the project to be published to third party portals *e.g. Contracts Finder (UK)*

(Note: If publishing to any other portal ensure you have filled in the compliant fields relevant for the Portal).

Open Tender settings!

When publishing Open *(advertising in the current tenders section)* the following fields are recommended:

-Visible on Website
-Visible on Forthcoming Tenders List
-Visible on Current Tenders List
-Allow online Tender Management
-Allow Online Expressions of Interest
-Allow Online Correspondence
-OJEU Contract Notice Visible (If applicable)
-OJEU Award Notice Visible (If applicable)

Closed Tender settings!

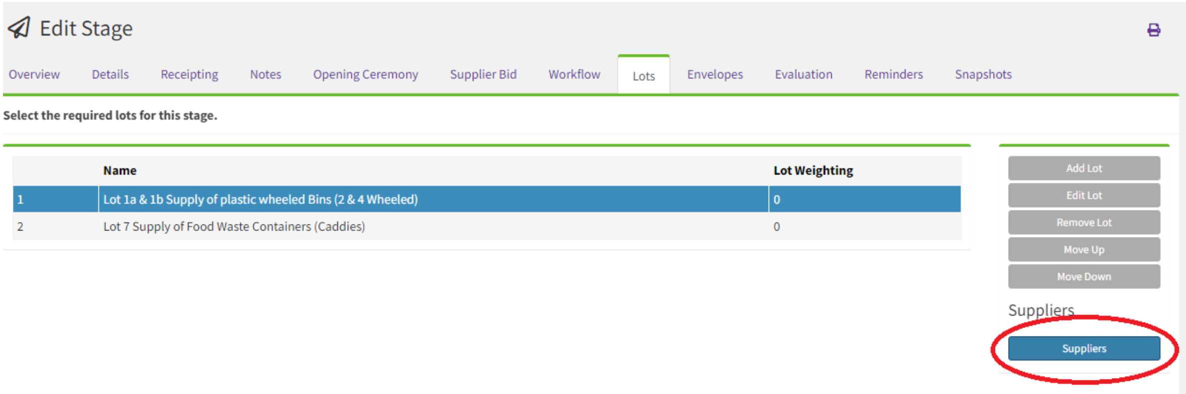
When publishing Closed ***(Invited Suppliers ONLY)*** the following fields are recommended:

-Visible on Website
-Visible only When Suppliers are Logged In
-Allow online Tender Management
-Allow Online Correspondence

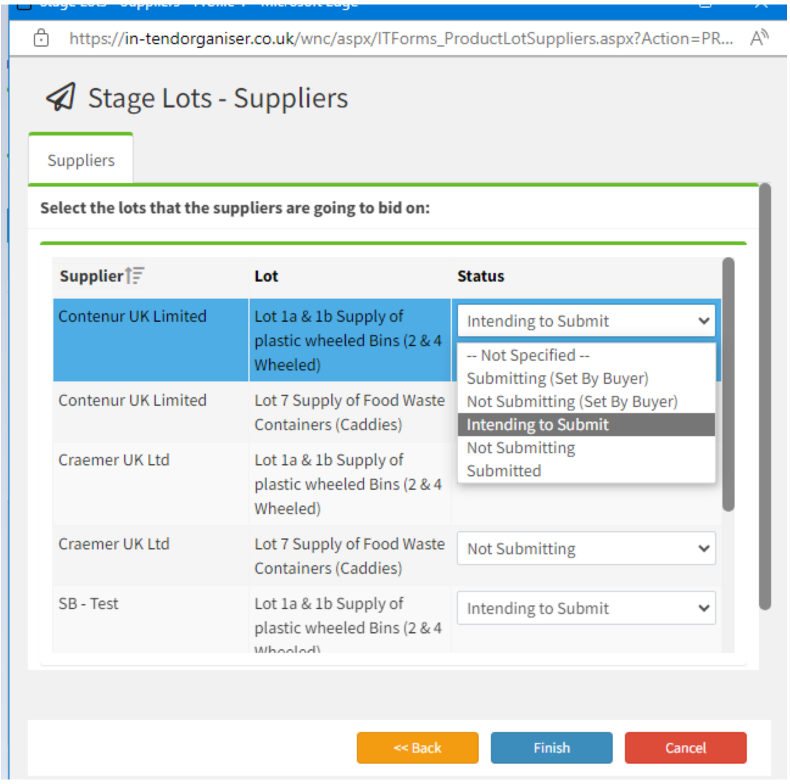
West Northamptonshire Council

Publishing Mini-Competition Across Multiple Lots

- You can assign lots to suppliers by going to ‘Edit Stage’ – ‘Lots’ after publishing the stage and then selecting the ‘Suppliers’ button.



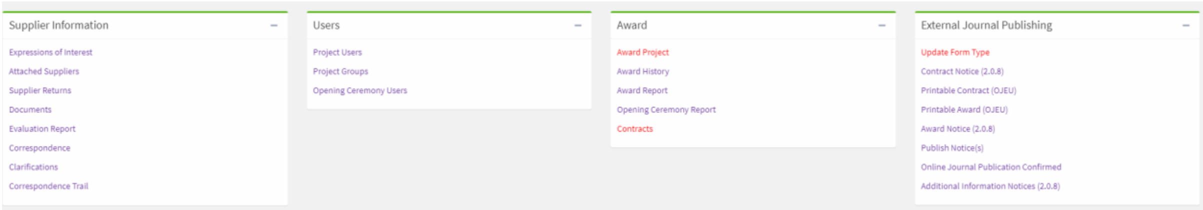
- Here you can select the 'Submitting set by buyer' or 'not submitting set by buyer' for attached suppliers on each of the lots you have added on the stage.



7. Managing the project

- Once the project has been saved, on the project summary screen you are presented with four main areas to manage the project.

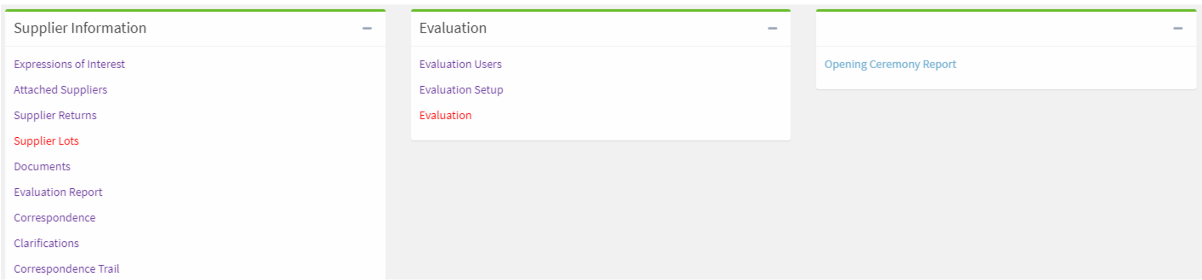
- Supplier Information
- Users
- Award
- External Journal Publishing



- **Supplier Information**: Allows you to view the number of expressions of interest, the supplier returns, allows you to issue correspondence (private message) and clarifications (public messages) etc.
- **Users**: Allows you to manage the project users / groups and opening ceremony users (if applicable) etc.
- **Award**: Allows you to award the project (only when the deadline has passed) etc.
- **External Journal Publishing**: Allows you to submit notices to Find a Tender.

- You're also able to manage the 'Stage' by clicking on 'Project Stages', then 'Stage Summary'.

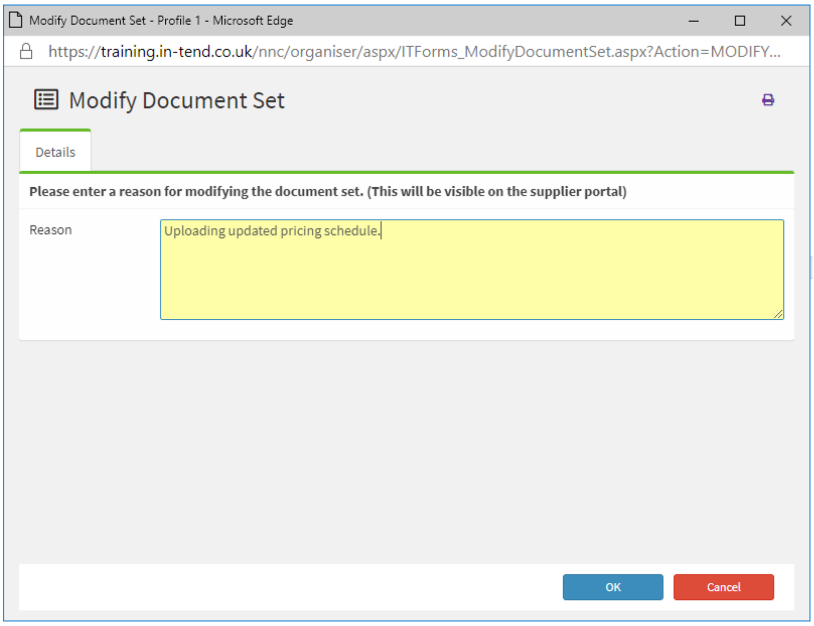
- Once the stage has been published, on the stage summary screen you are presented with three main areas to manage the stage.
  - Supplier Information
  - Evaluation
  - Opening Ceremony Report



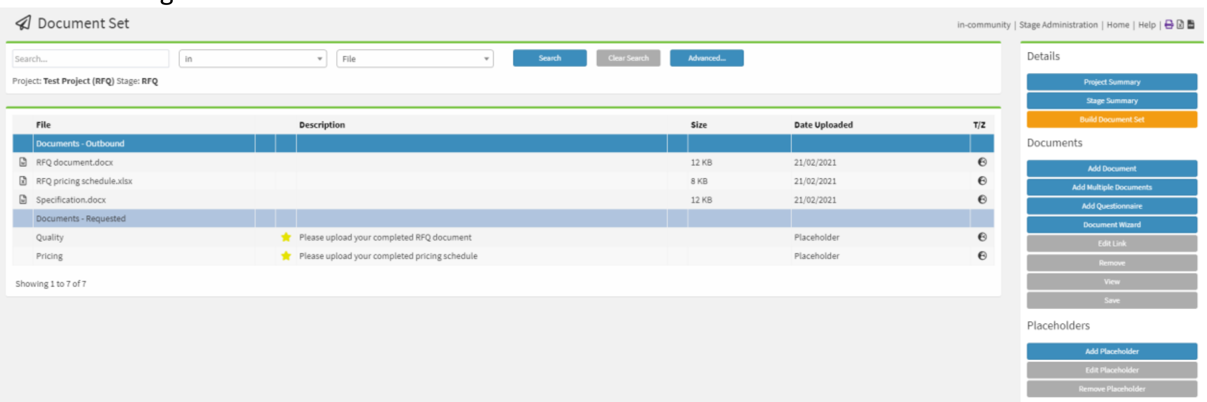
Modify the document set

- Once the project is live, from the project summary screen, you're able to access the ITT stage and associated documentation by clicking on 'Project Stages' and then 'Stage Summary'.
- From this screen, you have the option to view the 'Document Set' (shows you the documents / placeholders / questionnaire issued) or 'Modify Document Set'.

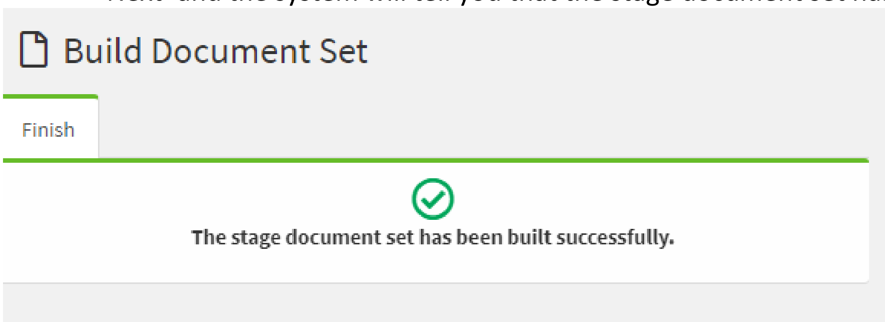
- Modifying the document set updates the documents which are visible to the supplier.
- To modify the documents, click ‘Modify document Set’.
- You then need to provide a reason.
- Click ‘Ok’.



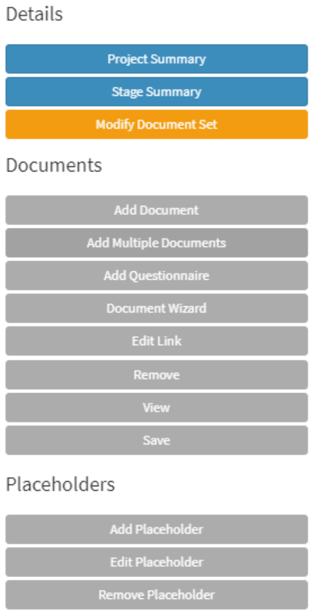
- Once you have clicked ‘Ok’, the system will let you update your documents / placeholders on the right-hand side.



- Once you have updated your documents / placeholders, you **must** click ‘Build document Set’. Failure to do this will result in the updated documents not being visible to the supplier on the supplier portal.
- Once you click ‘Build Document Set’ an on-screen wizard will appear. You just need to select ‘Next’ and the system will tell you that the stage document set has been built successfully.



- Click ‘Finish’ and then the system will ask you which suppliers you want to display the updated documents to. Select all by clicking the green tick.
- Click ‘Next’ and the page will refresh which indicates you have updated the document set. The way to check this is make sure you see the ‘Modify Document Set’ option on the right. The options to add / amend anything will also be greyed out beneath.

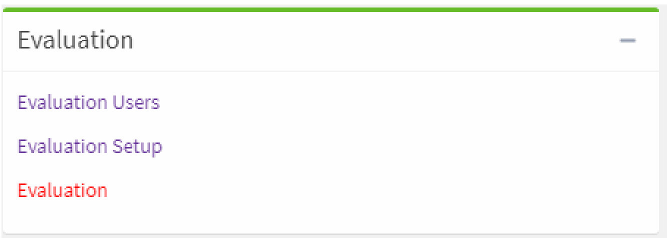


- The document set has been published to the supplier portal.

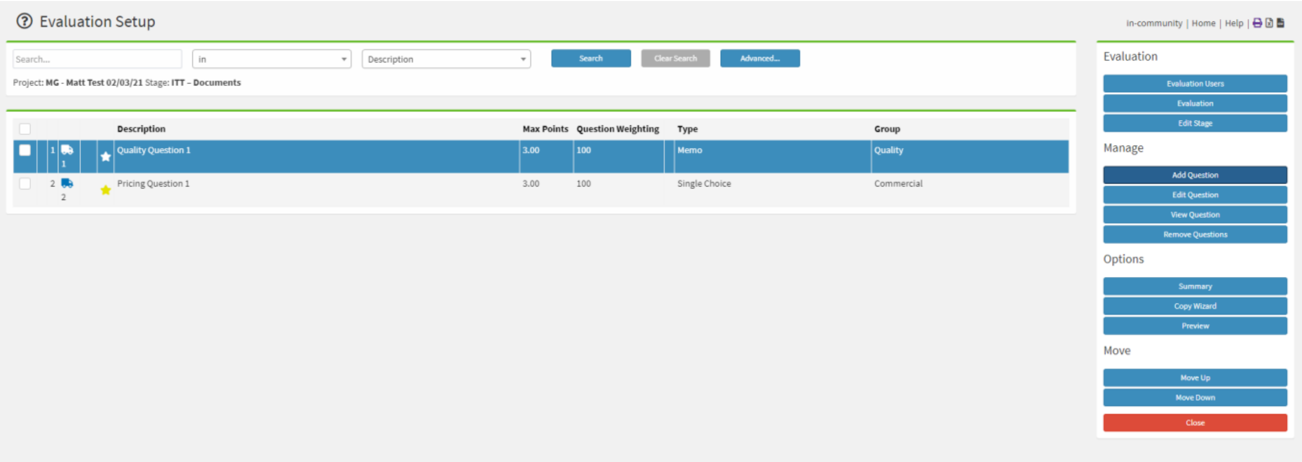
Amending the evaluation questionnaire

- Once the project is published, to change the evaluation questionnaire, you must first modify the document set. To modify the document, click ‘Modify Document Set’ from the ‘Stage Summary’ page.

- Enter your reason for the document set being amended and click ‘Ok’.
- You will then be taken to the ‘Document Set’ page. This shows you all documents, questionnaire and placeholders issued.
- To amend your questionnaire, click ‘Close’ and on the ‘Stage Summary’ page, click ‘Evaluation Setup’ at the bottom of the page.



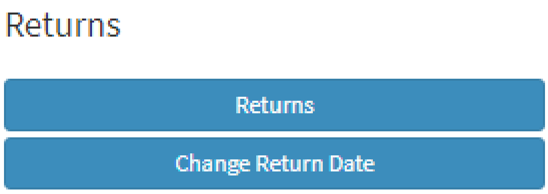
- You can then amend your question by using the options on the right hand side e.g. ‘Add Question’ / ‘Edit Question’ etc.



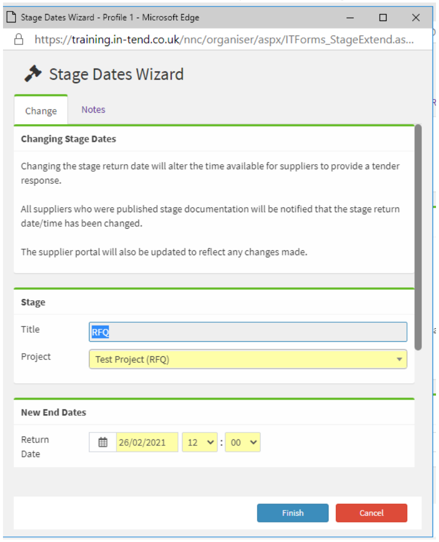
- Once you have finished, click 'Close' and you will be taken back to the 'Stage Summary' page.
- You will then need to click 'Build Document Set', clicking 'Next' and 'Finish'.
- **Note** – if any suppliers have expressed an interest, you will need to tick them to ensure they can see the most up to date information. Once you have selected all suppliers, click 'Next'.
- The page will refresh and the updated document set will be visible on the supplier portal.

Changing the return date

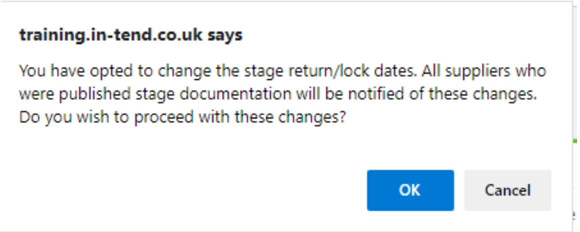
- **Note** – you're able to change the return date once a supplier has expressed an interest in the opportunity.
- To change the return date, click on 'Project Stages' from the 'Project Summary' page and then on the 'Stage Administration' page, click 'Change Return Date' on the right hand side.



- You can then select the new return date / time (including the lock date if applicable), in addition to providing a reason for the change below.



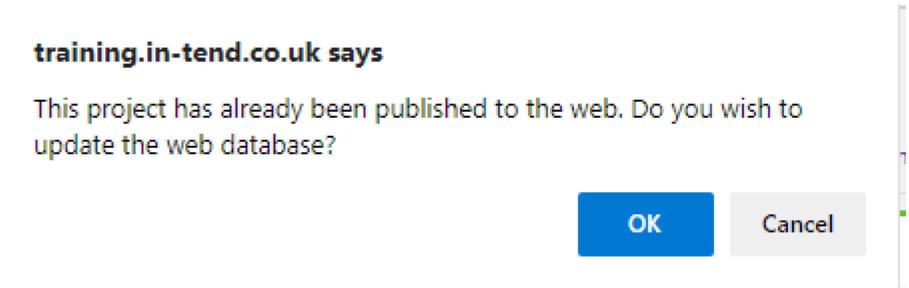
- Click ‘Finish’ and the system will display an on-screen message regarding the changing of the stage return / lock dates.



- Click ‘Ok’ and the stage deadline will be updated.
- **Note** - You can also set a deadline for clarifications via the ‘Receipting’ tab, however, the supplier can still send correspondence after this date / time.

Amending the Contracts Finder advert

- To amend your published Contracts Finder advert, click ‘Edit Project’ on the ‘Project Summary’ screen.
- Click onto the ‘Contracts Finder’ tab, make your amendments e.g. changing the contract start / end date and then click ‘Ok’.
- The system will then tell you that the project has been published to the web and if you wish to update the web database.



- Click ‘Ok’ to confirm the changes.
- The page will refresh and you will be taken back to the ‘Project Summary’ page.
- You will then need to click on ‘Publish Manager’, select the ‘Portals’ tab, tick ‘Contracts Finder’ and then select ‘Publish’.
- Click on the Contracts Finder link on the ‘Project Summary’ page to check that your changes have been published.

8. Manage Messages

- As part of the messaging functionality you will have access to a ‘Correspondence’ and a ‘Clarifications’ area.

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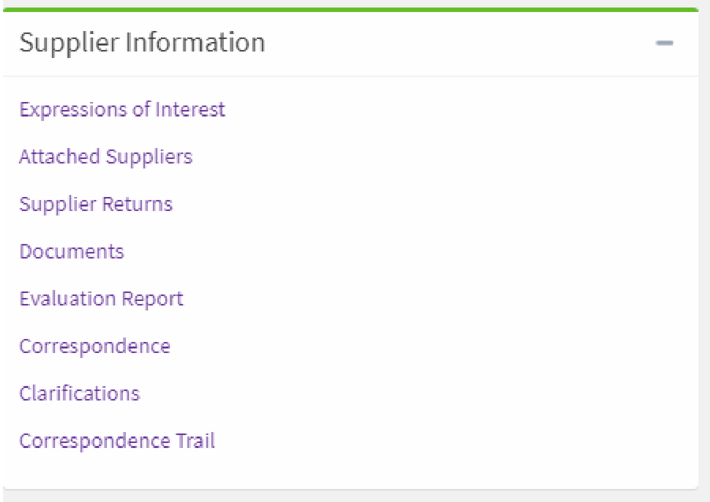
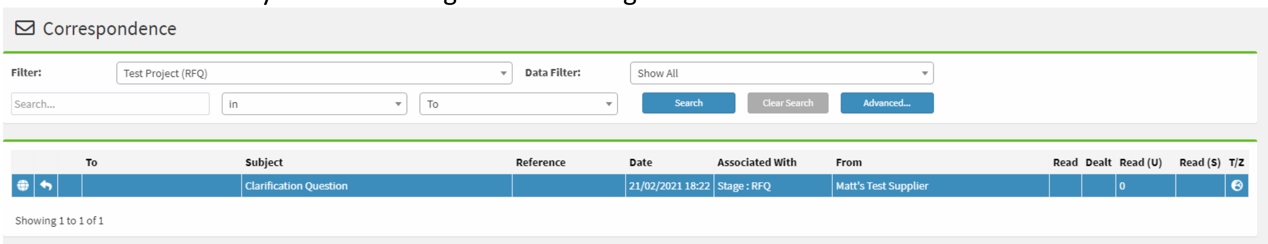
Receiving / Sending a Correspondence

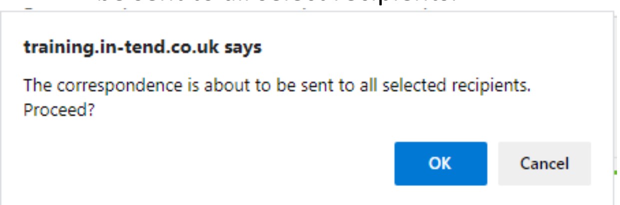
- If you receive a message (correspondence) from a supplier, you will receive an email.
- To access the message, go to the project summary page and click on ‘Correspondence’ in the supplier information area.



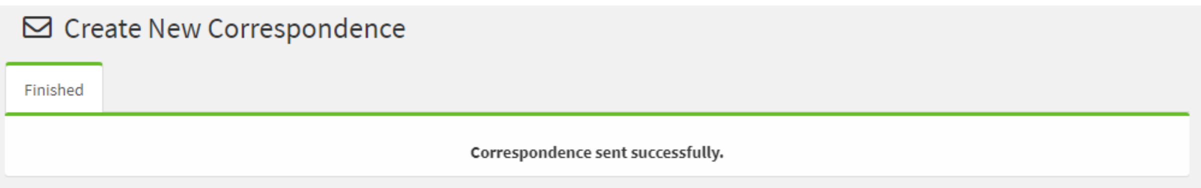
- The message will then be displayed and you can access the details and any associated attachment by double clicking on the message.



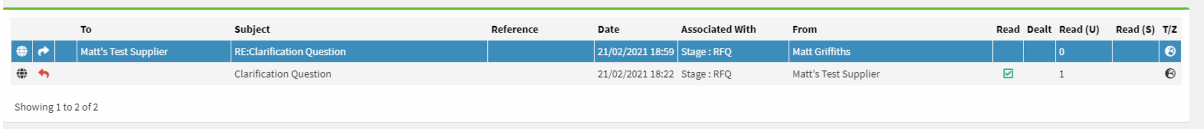
- If you are required to respond, you can either reply privately or issue a new clarification.
- To respond privately, either double click on the message or click ‘Reply’
- Draft your message, clicking next to then add any attachments. Click next again to then send the message.
- The system will then display an on-screen message to confirm that the message is about to be sent to all select recipients.



- Click ‘Ok’ and the system will tell you that the correspondence was sent successfully.



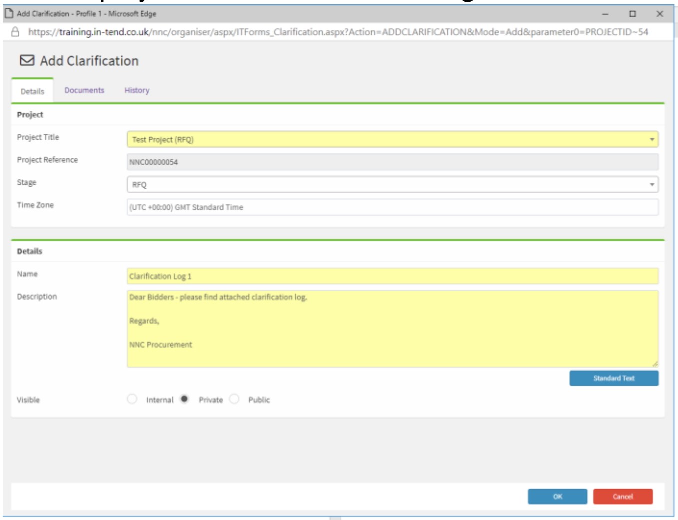
- Click ‘Finish’ and the page will refresh to take you back to the ‘Correspondence’ area.



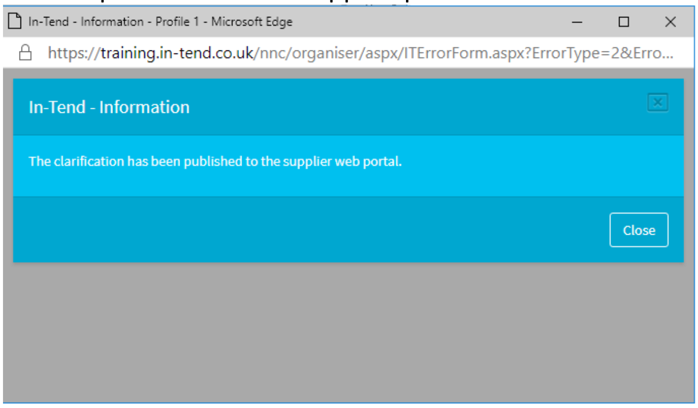
- You will be able to see if the supplier has read the message by looking at the ‘Read (S)’ column If you see a ‘1’, this confirms they have read it. To see the date and time the supplier reads the message, double click on the reply and click ‘History’.
- **Note** – the ‘Read (U)’ column refers to if the buyer has read the message.

Sending a clarification

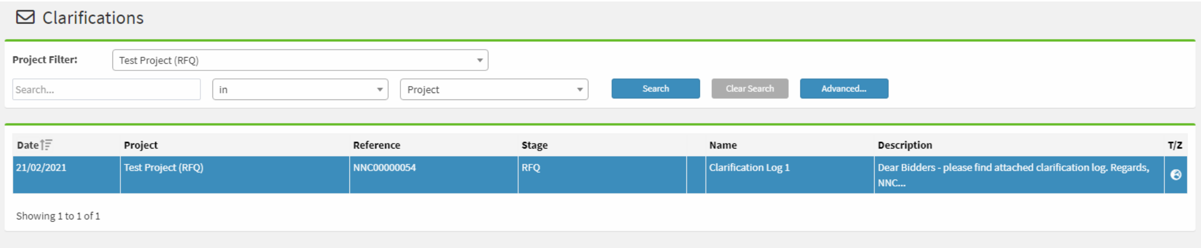
- To send a new clarification (e.g. a clarification log), click on ‘Clarifications’ via the supplier information area from the project summary page and then ‘Add Clarification’.
- When drafting your clarification, you will have the option to select who it is visible to. Select ‘Private’. This means the message will be sent to suppliers who have registered an interest or have been invited to the opportunity. If you select ‘Public’, this will allow anyone to access the message, even if they have not registered an interest. ‘Internal’ will only allow project users to see the message.



- If you need to add documents, click on the ‘Documents’ tab.
- Click ‘Ok’ to send the message.
- Once sent, an on-screen message will be displayed to confirm that the message has been published to the supplier portal.

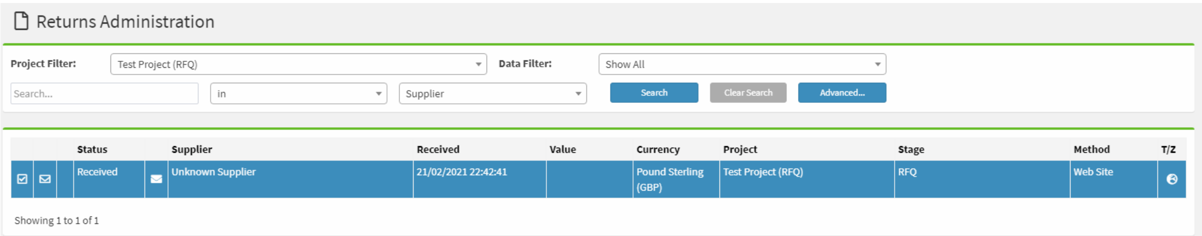


- Click ‘Close’ and you will be taken back to the ‘Clarifications’ area.
- If you need to check the time you sent the message, click onto the message and then select ‘History’.



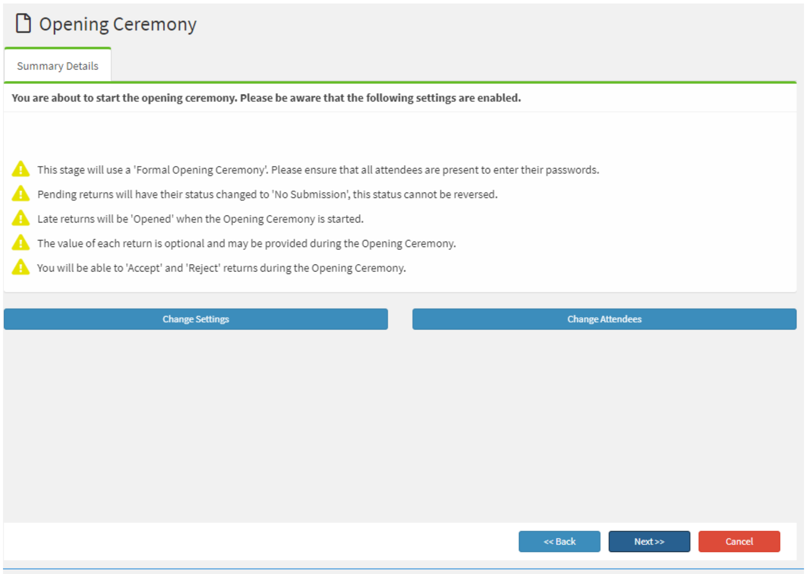
9. Accessing Supplier Returns

- You can access the supplier returns screen at any point during the process to see how many bids you have received.
- From the main project summary, click ‘Supplier Returns’ from the ’Supplier Information’ area.
- You will be able to see the supplier returns received against your project, with all supplier names anonymised and appearing as ‘Unknown Supplier’.



Perform a formal opening ceremony

- Once the submission deadline has passed, you will need to perform a formal opening ceremony to access the returns to accept / reject.
- From the project summary screen if you click on ‘Supplier Returns’ and then ‘Opening Ceremony’.
- A formal opening ceremony will be required to be undertaken. You will see the following screen:



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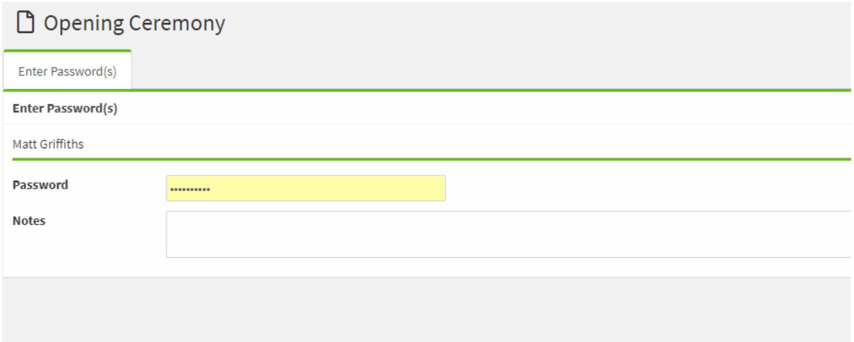
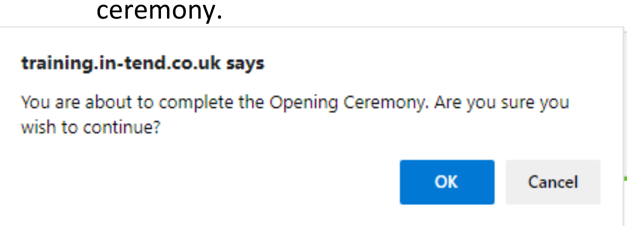
- To perform the opening ceremony, firstly click 'Change Attendees' and select the user who will undertake the opening ceremony.
- Click 'Next'
- The user will then be required to enter their password and click 'Next'.



- Cycle through the 'Receipts' page by clicking 'Next'.
- The system will display the suppliers who have submitted a return.
- **Note** – you may see the status of some suppliers as 'Pending'. This means that they have not submitting initially opting in.
- Click 'Next' and the system will ask you to enter your password again.
- Click 'Finish' and the system will confirm that you are about to complete the opening ceremony.



- Click 'Ok'.
- The supplier names will now display on the 'Returns Administration' page, with the 'Status' as 'Opened'.

Viewing the Return

- To view the contents of the supplier's return, click 'View Return' on the 'Returns Administration' page.

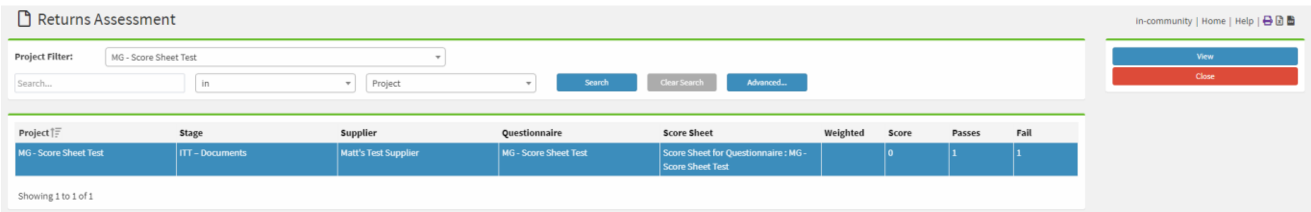
- A pop up screen will then appear which allows you to view the 'Details', Contents', any 'Previous Submissions' and 'Buyer Notes'.
- **Details:** This tab confirms the date and time which the submission was made and bid value entered by the supplier (if used in the project).
- **Contents:** This tab will show you all documents and placeholders uploaded by the supplier as part of their submission and also any completed questionnaires e.g. SQ or Declarations which they have filled in. You have the option of viewing each document, placeholder and questionnaire by clicking 'View'. You can also save individual files or download to a zip file.
- **Previous Submissions:** This tab will detail any previous submissions made by the supplier to the stage.

- **Buyer Notes:** This tab can be used to enter comments about the return e.g. “this supplier failed question 2.1a of the SQ and is therefore eliminated”.
- **Note –** you can also view the returned documents on the project by clicking ‘Returned Documents’ on the returns administration screen.

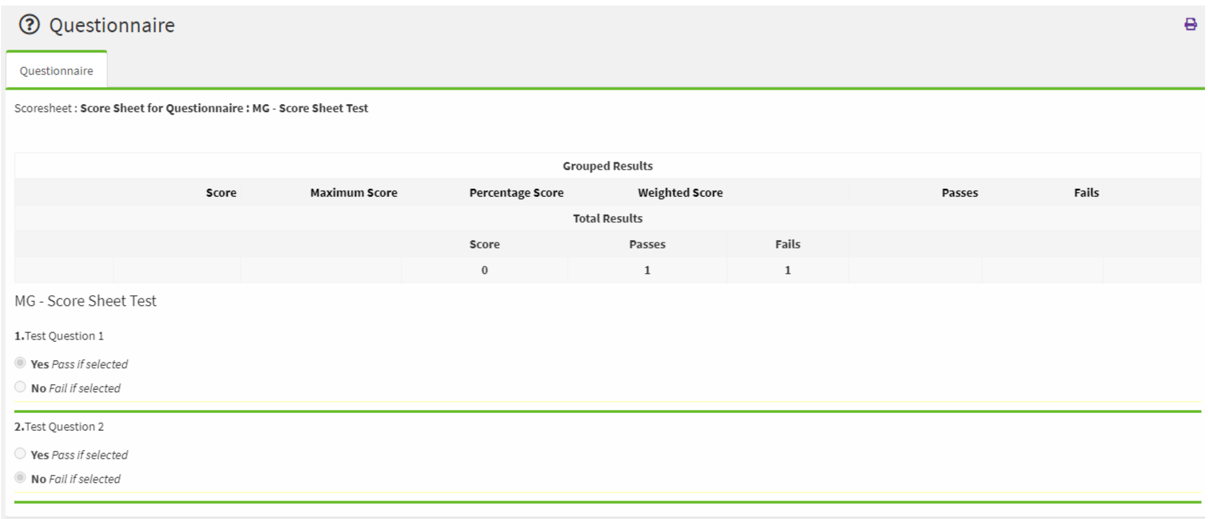
- **Note** – should you wish to upload any attachments / notes to the project, there is a ‘Document Storage’ area on the ‘Project Summary Screen’.

Returns Assessment

- Accessing the ‘Returns Assessment’ will allow you to view each supplier’s answers to the pre-built questionnaires which you have published as part of the document set e.g. the ‘SQ’ and ‘Declarations’ questionnaires.
- Click on ‘Returns Assessment’ to see a summary table of how many automatic pass / fail questions the supplier has achieved a ‘Pass’ and ‘Fail’ to.

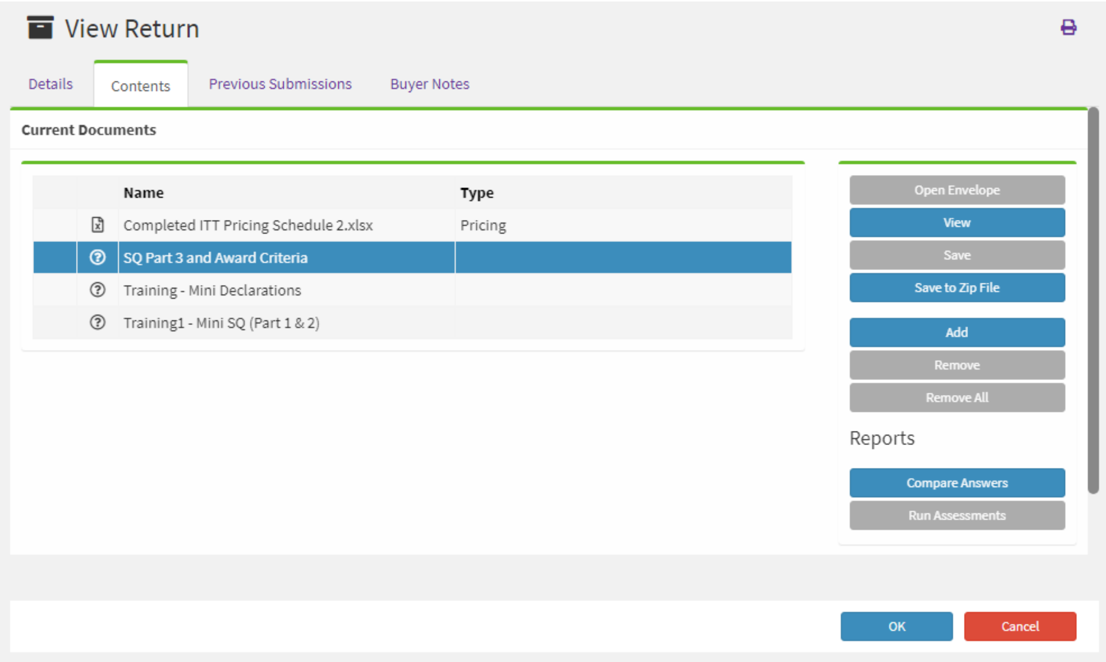


- Clicking on ‘View’ will allow you to see individual supplier responses.



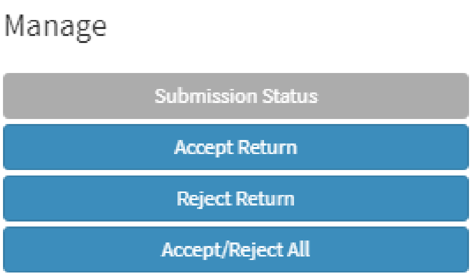
- Click ‘Close’ and then move on to the next supplier.
- **Note** – if a supplier has failed a Pass / Fail question, but you subsequently clarify that it was a mistake and need to pass them, make a note in the ‘Buyer Notes’ area. You will not be able to change their answer to the question, however, can mark their return as ‘Accepted’ (see Accept / Reject return below).

- Note – for any questions which require the Authority needs assess the information provided by the supplier e.g. a manual pass / fail question, you will need to access the return by clicking ‘View Return’, select ‘Contents’ and ‘View’ the SQ. You can then view the relevant responses and add any notes in the ‘Buyer Notes’ area before accepting or rejecting the supplier.

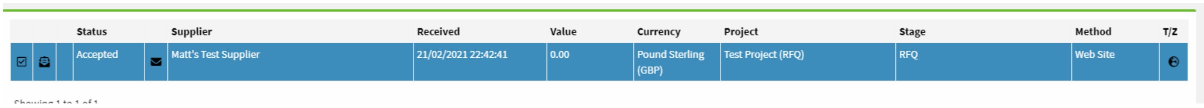


Accept / Reject return

- Once you have performed your pass / fail checking via the ‘Returns Assessment’ area, on the ‘Return Administration’ screen, for each supplier, you will need to accept or reject their return. You may wish to accept / reject one by one or there is an option to ‘Accept / Reject all’.



- If you select ‘Accept Return’, an on-screen message will appear which displays the supplier return. If you select ‘Accept’, the return will be accepted.
- Select ‘Reject Return’ and then ‘Reject’ for any suppliers who have failed the pass / fail element.
- The status column of the supplier return will display either ‘Accepted’ or ‘Rejected’.



- Click ‘Close’ and you will be returned to the project summary screen.

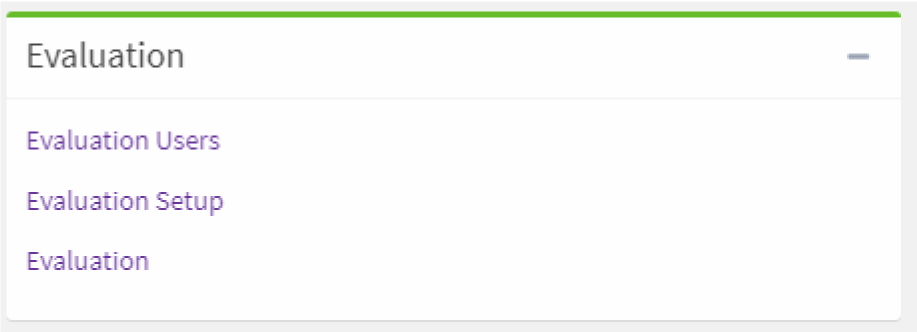
10. Online Evaluation

- Once the returns have been 'Accepted', evaluators may begin evaluating the evaluation questionnaire (e.g., Award Questionnaire). Only the accepted suppliers will be pulled through to be evaluated.

Assigning Evaluators and Moderators

Ensure you have added all evaluators and moderators to the project and stage evaluation users.

- To add users to the project, go to project summary, and click 'Project Users' from the Users area. Select the users from the drop-down list
- To add users to the stage evaluation. Go to the stage summary and click 'Evaluation Users' from the evaluation area. Select the users from the drop-down list and select role as 'evaluator' or 'moderator'
  Note – users **must** be added to the 'Project Users' **and** 'Evaluation Users' areas to carry out their role.

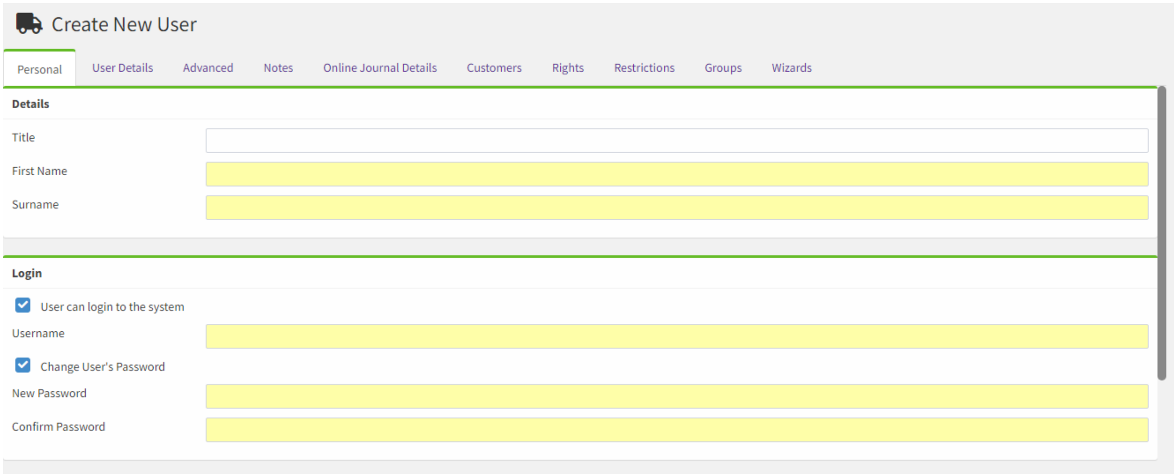


Creating New Users (incl. Evaluators)

If an evaluator is new to In-Tend, they will first need to be setup with an In-Tend account.

- To create a user, navigate to "Administration" at the top of the home page and scroll down to "Users" and then "New User" to open the new user wizard. All mandatory fields are indicated with a yellow background.

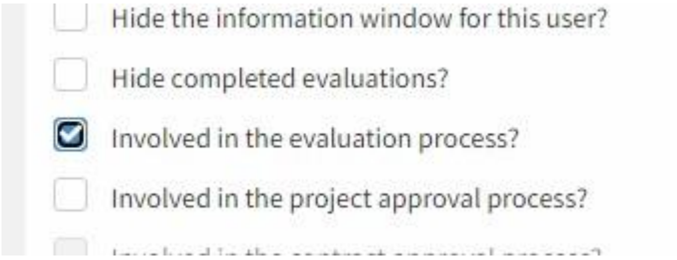
Personal tab



- On the first tab enter the user's full name. The username is the name the user will access the system with and is free text. The username is NOT case sensitive. Each time you create a new user you will have to assign a password. This is only used on the first time the user access`s the system as the system will prompt the user to rename their password making it private. Anytime the administrator changes a user's password the system will prompt the user to rename it on their first log-in

User Details tab

- **Email (mandatory)**: Enter the users email address. This is the email address that will receive system emails such as "You have received correspondence" etc
- **Telephone / Fax / Mobile / Time Zone**—Use as required "Buyer Profile" - [Internal] (default) [Visible To Suppliers] = The users basic contact details will be visible on the buyer profile tab of the supplier portal to suppliers if they are logged into the system. [Visible To Publicly]. The users basic contact details will be visible on the buyer profile to anyone who on the supplier portal.
- **Involved in the evaluation process**: Tick to allow user to be assigned an evaluation role



Advanced tab

- **Password expires**: Use this tick box to force user to rename their password every "X" days
- **Account Expires** = This should be used to set up a user with temporary access. Use the tick box and define the date the users account will expire.
- **Account currently locked** = The tick box will be ticked upon a user being locked out. A user will be locked out after 3 incorrect login attempts. Un-ticking the box allows 3 more attempts at log in.
- **Bad login** = A counter for bad login attempts. The counter will keep a total of bad login attempts until the "Reset" button is used to set the counter back to zero
- **Archived** = The user can be archived away in the system. Doing so will remove the website access and will not be able to log into the Organiser. Archived users can be restored by un-ticking the box.

Notes tab

Internal field to record information against the user.

Online Journal Details tab

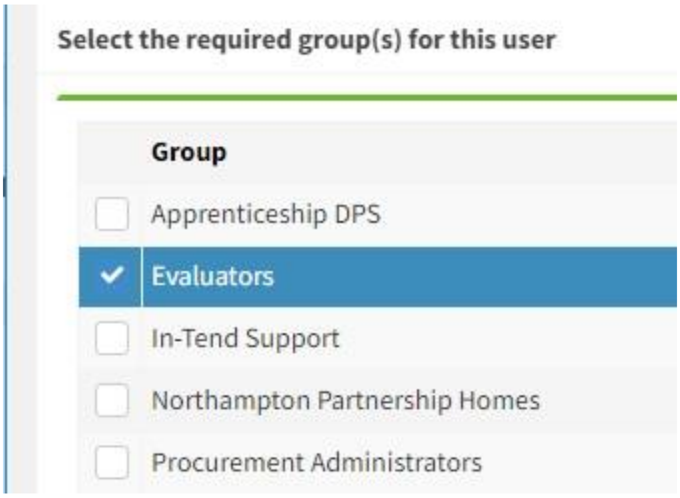
The information stored here pulls through into the electronic FTS notice in the mandatory information fields. If this user will be using the FTS Contract notice, then completing the information here will reduce the amount of information the user needs to complete on the FTS notice.

Customers tab

Tick the individual customers / departments that you want to be associated with the user. It is important the correct customer is selected so the user can be added to the project.

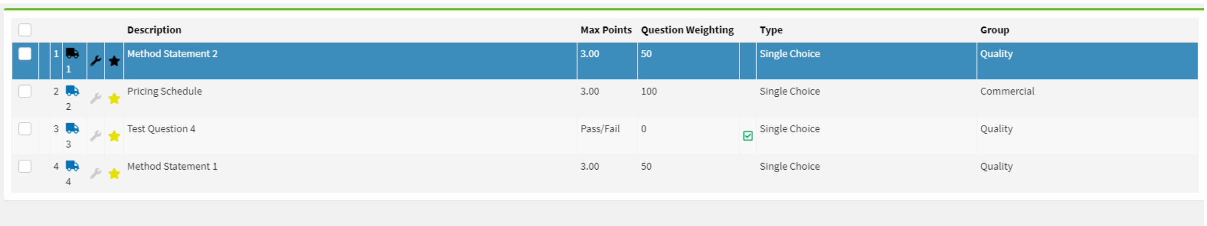
Rights tab
This allows you to define the system access rights for the user. Leave this blank if the user is part of a group (e.g., evaluators, Quick Quotes).

Groups tab
This allows you to tick the groups to associate with this user (e.g., evaluators, Quick Quotes).



Wizards tab
This allows you to tick the wizards the user will have access to (e.g., quick quotes).

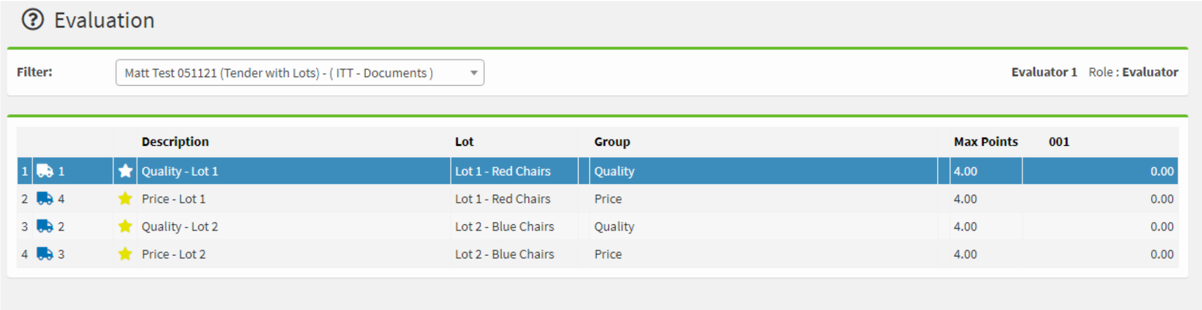
Evaluation Setup
- Once you add at least one evaluator, the evaluation can commence. You will see that the ‘Evaluation’ button will be red if no evaluators have been assigned.
- Click on ‘Evaluation Setup’ and you will see the evaluation questions you created (Quality and Price). You will be able to see the weightings of each question, the max points etc.



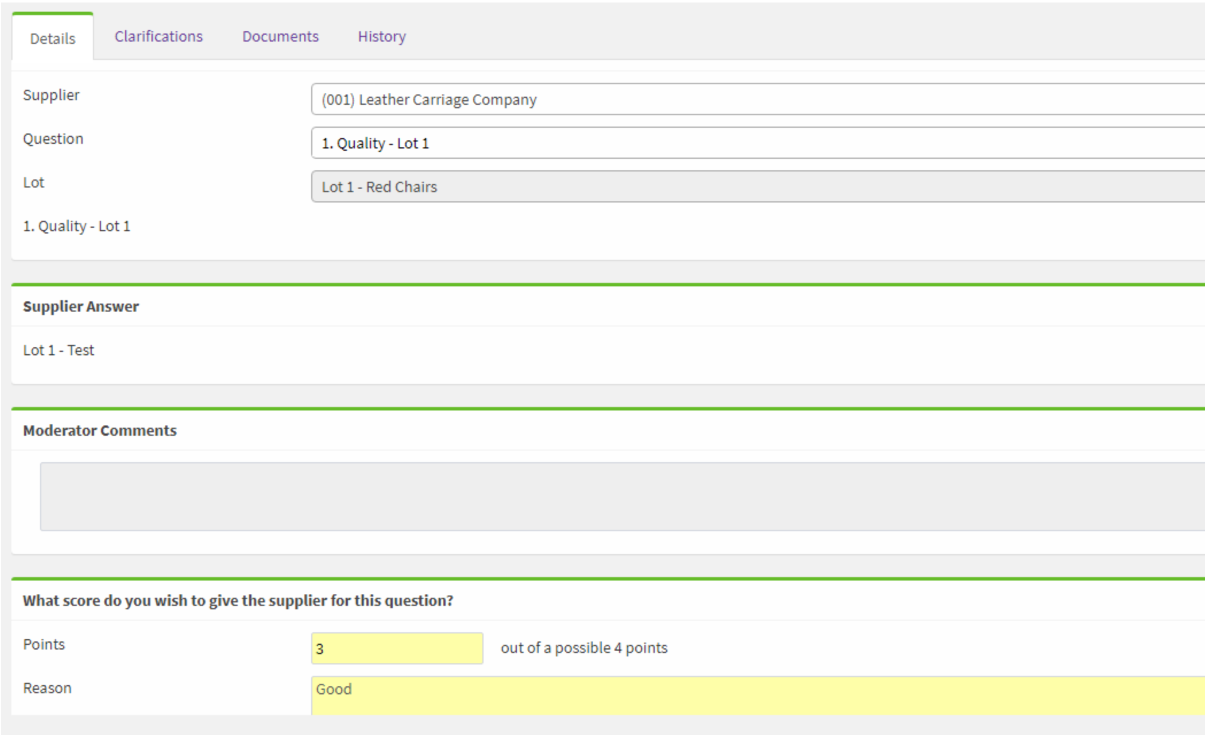
	Description	Max Points	Question Weighting	Type	Group
1 1	Method Statement 2	3.00	50	Single Choice	Quality
2 2	Pricing Schedule	3.00	100	Single Choice	Commercial
3 3	Test Question 4	Pass/Fail	0	Single Choice	Quality
4 4	Method Statement 1	3.00	50	Single Choice	Quality

- Click on the question to then select the ‘User Restrictions’. This will then only allow the specified evaluator(s) to see that question.
- Clicking on ‘Evaluation’ will show you the overview as an evaluator.
- **Note** – if you place your curser over the numbers along the top, the supplier’s name will be displayed.

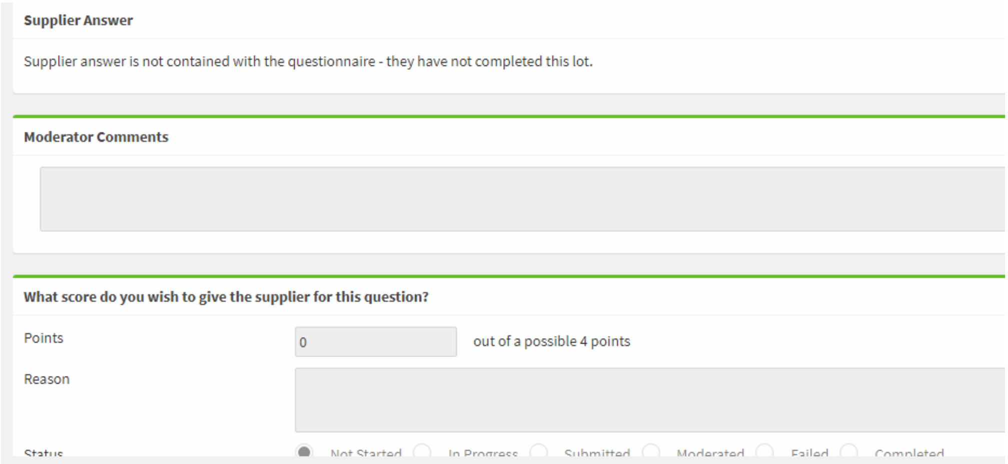
- Note – if the project is split into Lots, the 'Lot' tab will appear. This informs you as to which lot the question relates to.



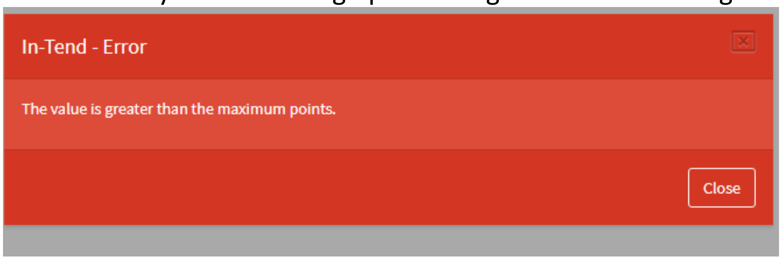
- The key to the top right-hand corner shows you the different status.
  - White = Not Started
  - Purple = Revised
  - Grey = In Progress
  - Yellow = Submitted
  - Red = Failed
  - Blue = Moderated
  - Green = Completed
- Click 'Evaluate' against the first question.
- A pop-up window will appear which allows you to enter your score / comment.
- **Details**: Within the details tab, you can see the supplier answer provided and will be required to enter a score and reason (comment).
- Note – if your project is split into lots, you will see the 'Lot' dropdown option appear so you can add scores and comments to the lot specific award criteria. The Lot option is greyed out on purpose, as you cycle through the different lots by amending the 'Question' drop-down menu.



- Note – if the supplier has not submitted a return against a specific lot, you will see a message on screen to inform you that the question does not require evaluation. The score and comment box will be greyed out.



- **Note** – the reason box can be resized by clicking in the bottom right-hand corner and dragging it down.
- **Note** – you will see that the ‘Reason’ box is yellow, as comments were set to mandatory.
- **Note** – If you try and enter a score higher than the maximum available, when you click ‘Next’ the system will bring up a message that the value is greater than the maximum points.

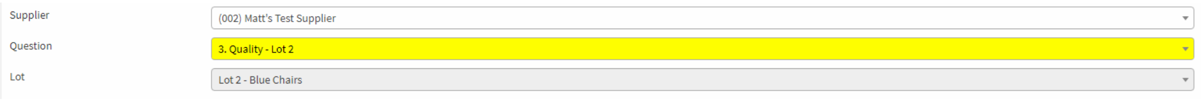


- Once you have entered the score and comment, you can change the status of the question you are evaluating to ‘Submitted’.
- **Clarifications**: If an evaluator requires further clarification, they can use the ‘Clarifications’ tab to send a message to the moderator.
- **Documents**: The documents tab will show the returned documents from the supplier against the placeholders, including their completed evaluation questionnaire (if applicable).
- **Previous submissions**: The previous submissions tab will detail any of the previous returns made to the stage by the supplier.
- Clicking ‘Next’ cycles the evaluator to the next question they are required to evaluate.

- To switch between the different submissions, there will be a dropdown box for ‘Supplier’.

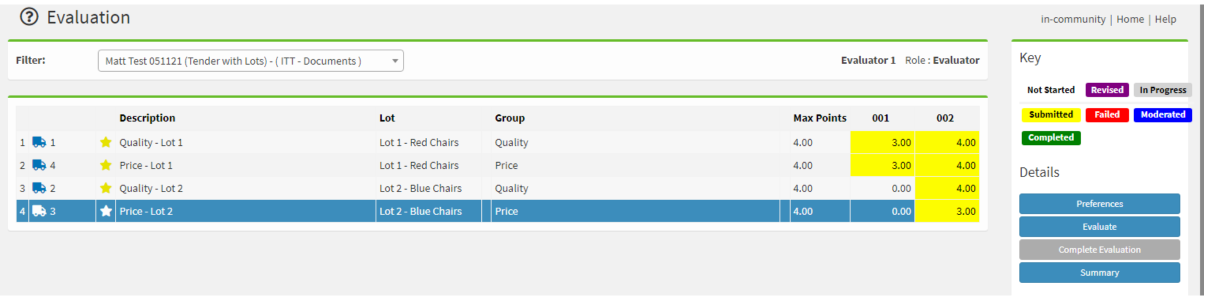
- **Note** – if your project is split into Lots, you will see a box for ‘Lot’ but it will be greyed out. As you change the questions you are evaluating, you will see the Lot display change.
- Clicking ‘Ok’ closes the evaluation pop out screen and the user will be taken back to the ‘Evaluation’ page.
- **Note** – the evaluator will always need to remember to update the status of each question to ‘Submitted’.

- When you mark your questions as ‘Submitted’, they will display in yellow.



Submitting Evaluation

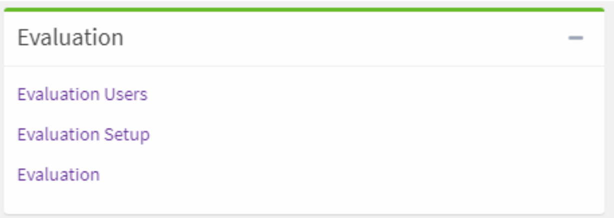
- Once the evaluator has finished their evaluation, they need to ensure all questions have a status of ‘Submitted’. Once they do this, their evaluation screen will appear as per the below.



- **Note** – when using lots, if a supplier has opted out, you won’t be able to add any scores or comments for those questions. On the summary screen, the score will correctly state 0.00 and have the status of ‘Not Started’.
- **Note** – the evaluator can still go back in and change the scores / reasons at any point until the moderator moves the question status to ‘Moderated’.
- Once the evaluator has marked all questions as ‘Submitted’, they have finished and can log out of the system.

11. Online Moderation

- Once the moderator logs in, they need to click on ‘Evaluation’ from the ‘Stage Summary’ page.
- **Note** – you need to make sure you’re set as the ‘Moderator’ within ‘Evaluation Users’.



- Clicking ‘Evaluation’ will then present the average scores for each supplier on the screen.
- **Note** – you will see the role of moderator confirmed in the top right-hand corner.
- **Note** – if you place your curser over the numbers along the top, the supplier’s name will be displayed.
- **Note** – if the project is split into Lots, the ‘Lot’ tab will appear. This informs you as to which lot the question relates to.

Evaluation

Filter: Matt Test 051121 (Tender with Lots) - (ITT - Documents)

Matt Griffiths Role : Moderator

		Description	Lot	Group	Max Points	001	002
1	1	Quality - Lot 1	Lot 1 - Red Chairs	Quality	4.00	3.00	4.00
2	4	Price - Lot 1	Lot 1 - Red Chairs	Price	4.00	3.00	4.00
3	2	Quality - Lot 2	Lot 2 - Blue Chairs	Quality	4.00	0.00	4.00
4	3	Price - Lot 2	Lot 2 - Blue Chairs	Price	4.00	0.00	3.00

- The moderator can also see a summary of the scores by clicking ‘Summary’. The system will show them the two sections (e.g. Quality and Price) and the weightings / total scores (points) and also total score as a weighted percentage for each supplier.
- **Note** – if your project is split into lots, the summary will be split by lot.

Evaluation

Filter: MG - Online Journal Test - (ITT – Documents)

Description	Max Points	001	002	003
Question Groups				
Quality	6.00	6.00	5.00	5.00
	60.00%	60.00%	50.00%	50.00%
Commercial	3.00	3.00	1.00	3.00
	40.00%	40.00%	13.33%	40.00%
Total Score (Percentage)	100.00%	100.00%	63.33%	90.00%
Total Score (Points)	9.00	9.00	6.00	8.00
Evaluation Tools				
Total Score (Points)	9.00	9.00	6.00	8.00
Total Score (% Weighted)	100.00%	100.00%	63.33%	90.00%
Rank		1	3	2

- To moderate a question, double click on the question or select the question and click ‘Evaluate’.
- You will then see a pop up with different tabs.
- **Details**: This will allow you to enter a moderated score / comment. You also have the option of completing the ‘Moderator Comments’ box for each question.
- Once the question has been moderate, the moderator can then update each question to ‘Moderated’ status.

Status ○ Not Started ○ In Progress ○ Submitted ● Moderated ○ Failed ○ Completed

- Marking each question as ‘Moderated’ restricts the evaluators from amending their scores and comments any longer for that question.
- **All Answers**: The moderator will also be able to see the individual scores and comments from each evaluator by clicking on the ‘All Answers’ tab.

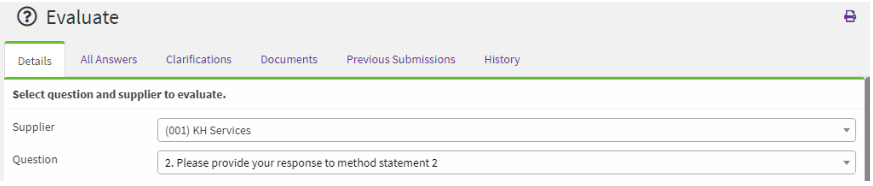
Evaluate

Details | All Answers | Clarifications | Documents | Previous Submissions | History

All Answers

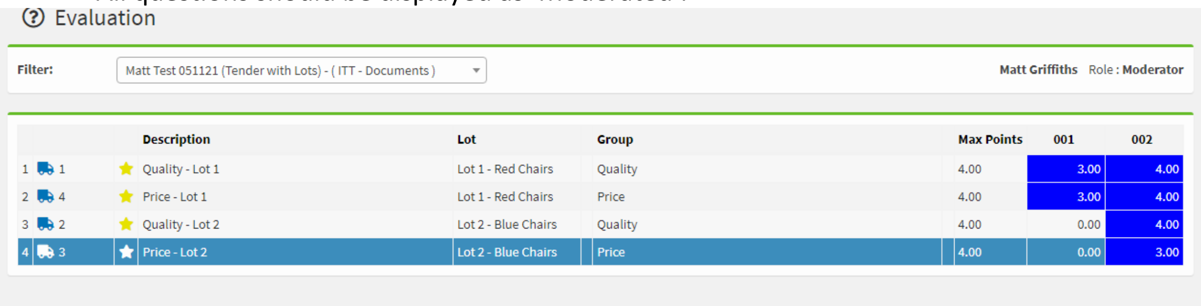
Evaluator: Matt Griffiths1
Points: 3
Status: Submitted
Reason: Good response

- **Clarifications**: Access the clarifications tab to see any clarifications submitted to you by the evaluation team.
- **Documents**: Access the documents tab to view the documents returned by the supplier as part of their submission.
- **Previous Submissions**: The previous submissions tab will detail any of the previous returns made to the stage by the supplier.
- **History**: Clicking on the 'History' tab will show you the audit trail for the question and the scores / comments entered
- Moderate each question in turn. Navigate between the different suppliers by using the 'Supplier' dropdown.



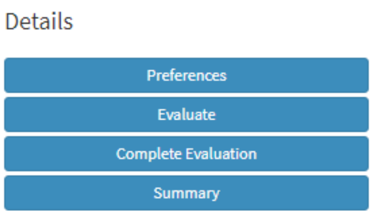
Completing the moderation

- Once you have moderated all questions, click on 'Summary' to see the updated rankings and percentage totals.
- All questions should be displayed as 'Moderated'.

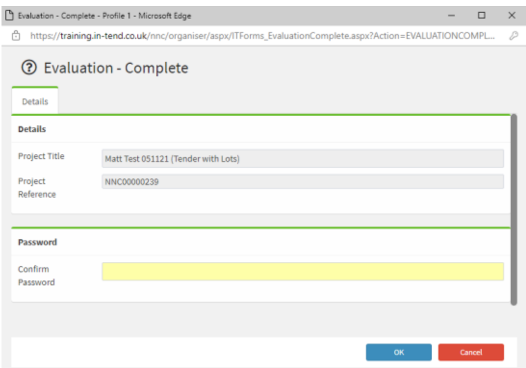


		Description	Lot	Group	Max Points	001	002
1	1	Quality - Lot 1	Lot 1 - Red Chairs	Quality	4.00	3.00	4.00
2	4	Price - Lot 1	Lot 1 - Red Chairs	Price	4.00	3.00	4.00
3	2	Quality - Lot 2	Lot 2 - Blue Chairs	Quality	4.00	0.00	4.00
4	3	Price - Lot 2	Lot 2 - Blue Chairs	Price	4.00	0.00	3.00

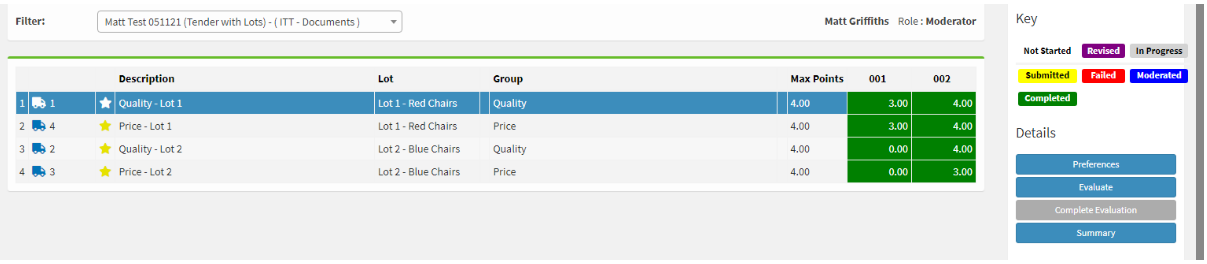
- **Note** – if using lots and you have any suppliers who opted out of any lot questionnaires, you will not be able to mark those questions as moderated (above). The score for those questions will remain as 0.00.
- To complete the moderation, click the 'Complete Evaluation' button. Clicking this will stop any scores / comments being amended and will change all questions to 'Completed' status.



- Once you click 'Complete Evaluation', you will be required to confirm your password and click 'Ok'.



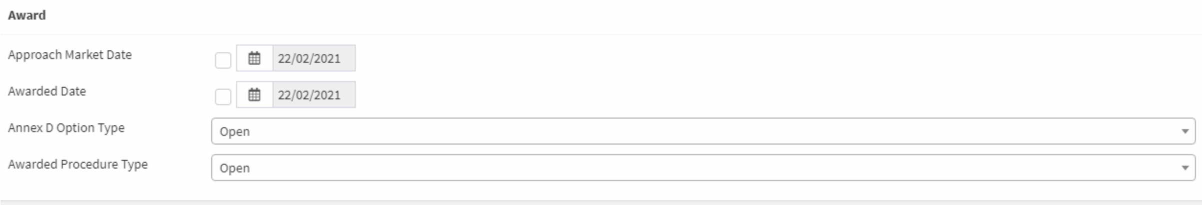
- The page will then refresh and all questions will display as ‘Completed’ and the ‘Complete Evaluation’ button will be greyed out.



- Click ‘Close’ and you will be taken back to the ‘Stage Summary’ screen.

12. Awarding Project (supplier portal and Contracts Finder)

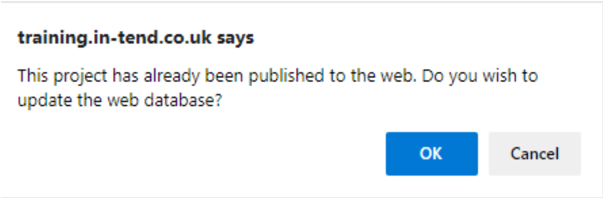
- After the evaluation has been completed you should send a message to the successful and unsuccessful s(s) via the ‘Correspondence’ area.
- For the Contracts Finder award to submit correctly, you must have selected the ‘Award Procedure Type’ against the ‘Contracts Finder’ tab. To do this, click ‘Edit Project’ from the ‘Project Summary’ screen.
- **Note** – it will not display in yellow (mandatory).



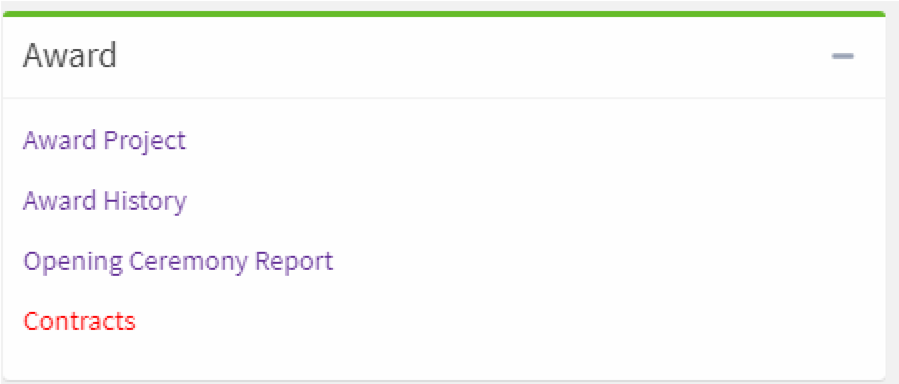
- For your award notice to publish, you will need to ensure the following fields are populated (some already will be):

  - **Sub directive** – found on the ‘Type’ tab
  - **CPV code** – found on the ‘CPV’ tab
  - **Contract start date** – found on the ‘Timescales’ tab
  - **Contract end date** – found on the ‘Timescales’ tab
  - **Email address** – found on the ‘Contracts Finder’ tab (selecting the ‘User’ will satisfy this requirement)
  - **Telephone number** – found on the ‘Contracts Finder’ tab (selecting the ‘User’ will satisfy this requirement)
  - **Awarded date** – found on the ‘Contracts Finder’ tab

- Once you click ‘Ok, the system will display a pop-up message asking you if you wish to update the web database.

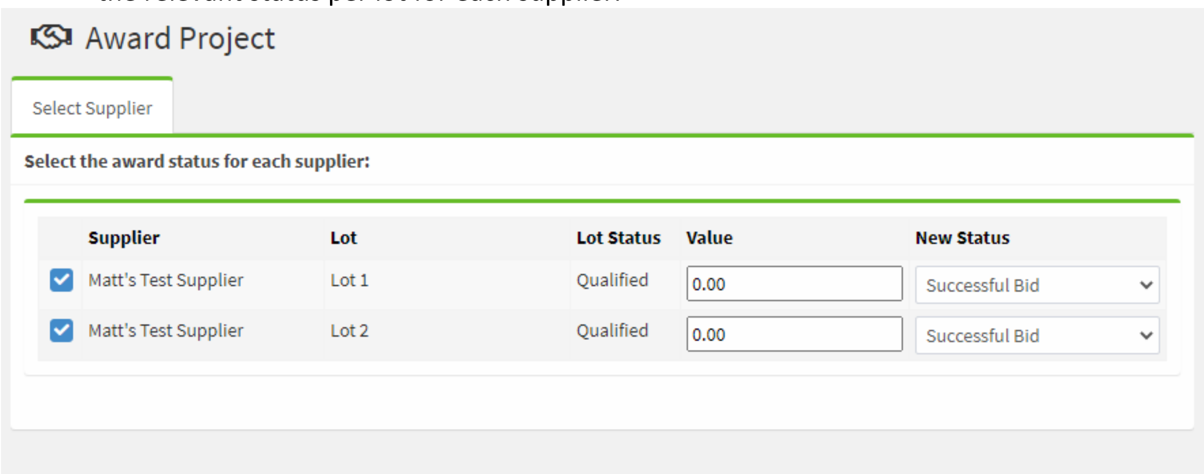


- Click ‘Ok’.
- To formally award your project on the system click ‘Award Project’ from the project summary screen.

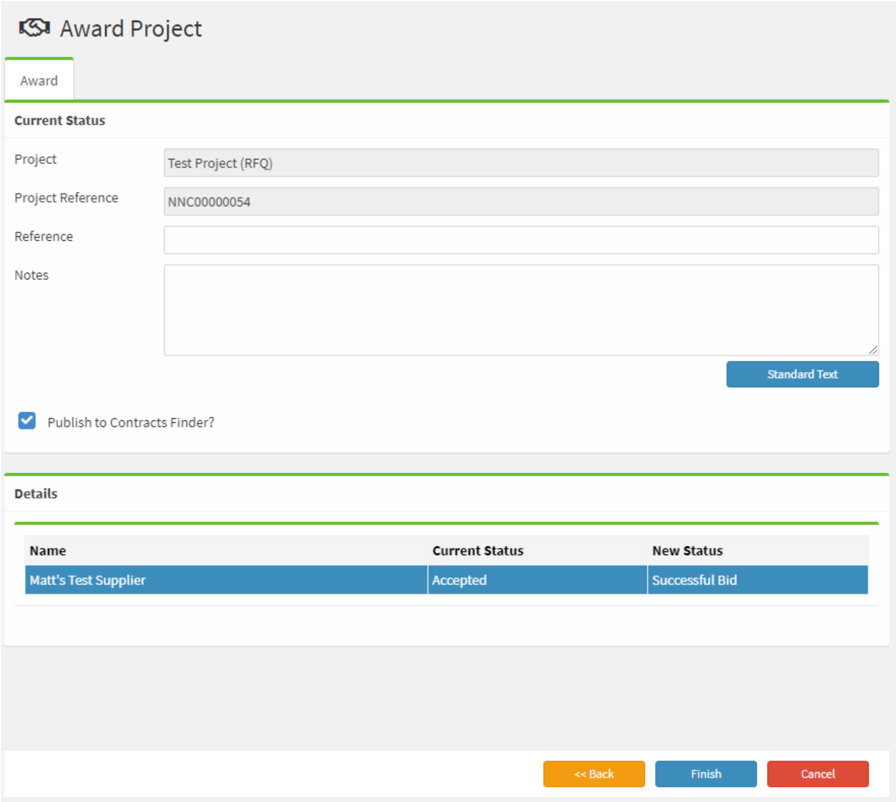


- You will need to select which supplier is successful / unsuccessful by updating the ‘New Status’ column, selecting ‘Successful Bid’ / ‘Unsuccessful Bid’ etc.
- **Note** - if you are observing a 10-day standstill, you can also select the status as ‘Intention to Award’. The project workflow will then update on the ‘Project Summary’ screen to indicate that the intention to award has been issued and the standstill period has commenced. Once the standstill has concluded, you can click ‘Award Project’ to then update the ‘New Status’ to ‘Successful’. Make sure you select the supplier to the left-hand side.

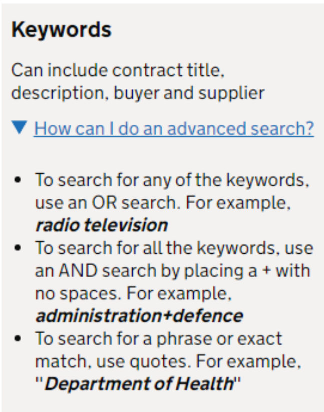
  Note – should you be awarding multiple lots, you will see the lots listed and you can select the relevant status per lot for each supplier.



  Note – you can also enter an awarded value for the successful supplier.
- If you click ‘Next’, the system will then display an overview of the award.



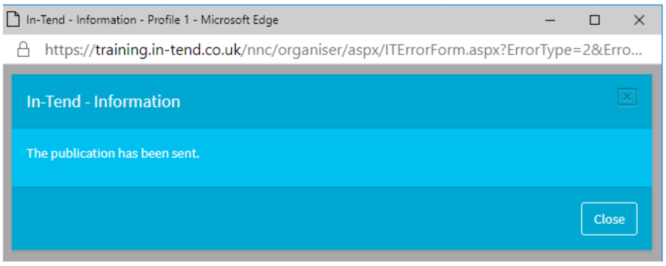
- To publish the award to Contracts Finder, tick ‘Publish to Contracts Finder’.
- Click’ Finish’.
- To check that you have successfully awarded your project select ‘Award History’ and you will see the awarded supplier displayed.
- Your project has been awarded on Contracts Finder and the supplier portal.
- Click ‘Close’.
- **Note** – despite awarding, the link on the ‘Project Summary’ page will show you the original Contracts Finder notice that was submitted.
- To see your award notice, please visit https://www.contractsfinder.service.gov.uk/Search enter the project title in the ‘Keywords’ search box, filter by ‘Awarded contract’ and click ‘Search’.
- **Note** – it is also advisable to filter by ‘Latest publication date’.
- **Note** – if you want the system to perform an advanced search, please follow these instructions:



11. Submitting a Contract Award Notice to Find a Tender

- To submit your Contract Award Notice to Find a Tender, on the 'Project Summary' page, please click 'Award Notice (2.0.9)'.

- Most information will be automatically populated from the original Contract Notice, but you will see a tab for 'Section V: Award of Contract'.
- You will also see a tab entitled 'Annex D1 – General procurement', but this may not apply in all circumstances.
- On the 'Award of Contract' tab, click 'Add'. A pop-up window will then appear for you to start entering the award details.
- Any mandatory fields will be displayed in yellow.
- When you get to 'V.2.3) Name and address of the contractor', you will need to click 'Add' on the right-hand side to be able to enter the awarded supplier(s) details.
- Once all required information has been added, click 'Ok' and then 'Finish'.
- You will then be taken back to the 'Project Summary' page.
- When you are ready to submit your Contract Award Notice, please 'Publish Notice(s)', select the relevant notice, click 'Ok' and then 'Publish'.
- The system will then inform you that the publication has been sent.



- Click 'Close' and the system will display the 'Project Summary' screen.
- **Note** – you will see the project workflow has updated.

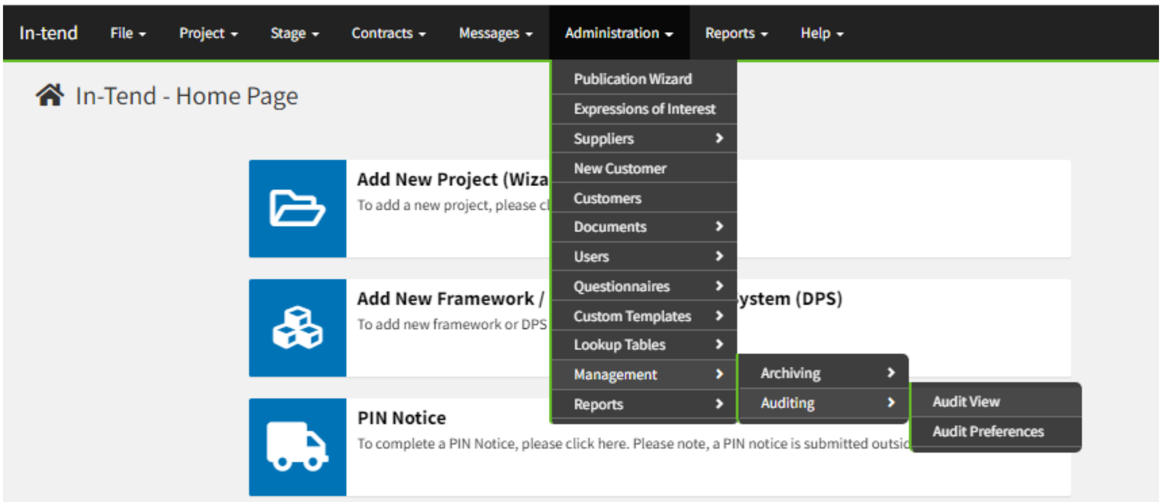
12. Evaluation Report

- The final element of the project workflow is the 'Evaluation Report'.
- If you click on 'Evaluation Report' from the workflow itself, a text box will appear.
- You can then enter any additional information in that you wish to provide an overview of the evaluation.
- Click 'Ok' and the workflow will update.

13. Audit View

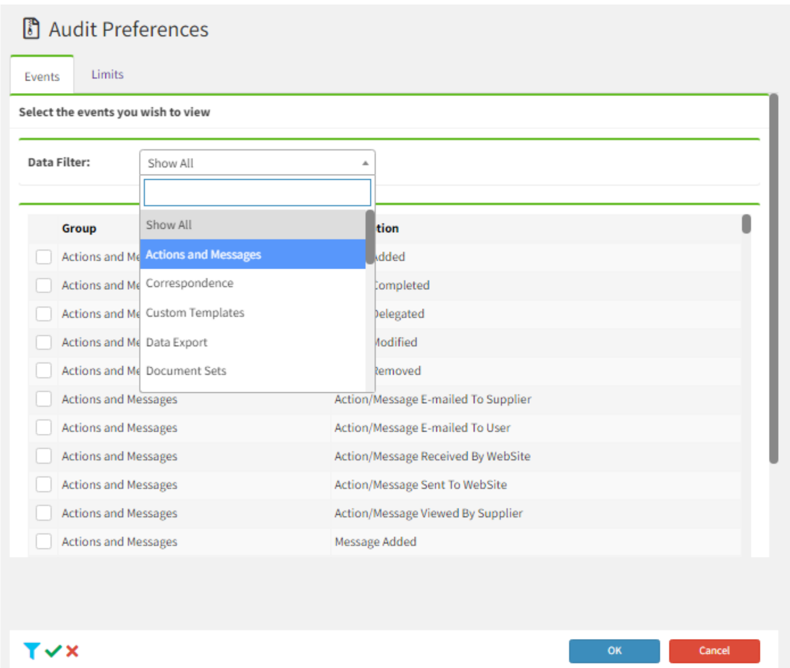
You should be able to see the steps project users or suppliers have taken within the audit view.

This can be done by going to Administration - Management - Auditing - Audit Preferences and choose what information you would like to view.



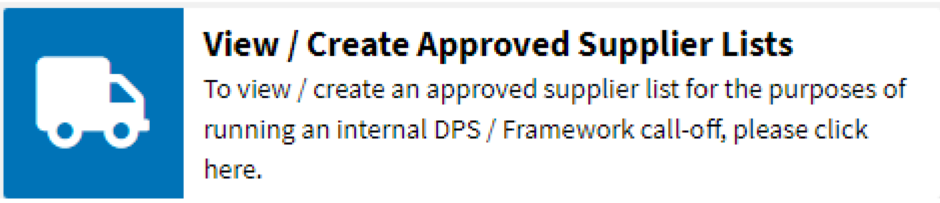
Once you have chosen the entries you would like to see I would advise selecting the 'Limits' tab on the pop out window and inputting a time frame and selecting ok.

If you then go to Administration - Management - Auditing- Audit View and you should see the list of actions, if you then select username from the 'Data 1' drop down you should be able to search the project title.

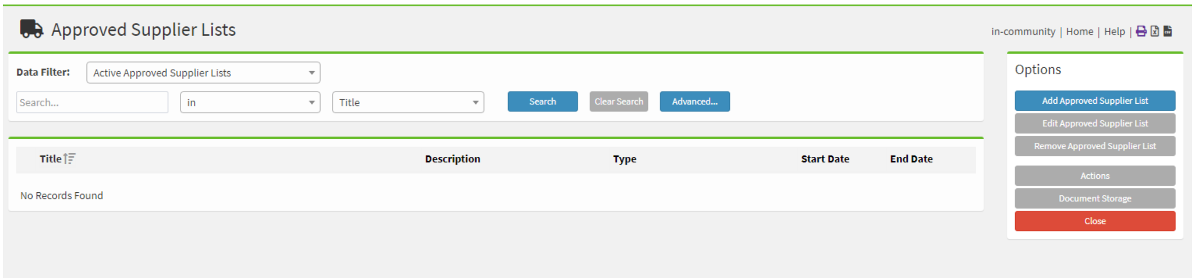


14. Create an Approved Supplier List

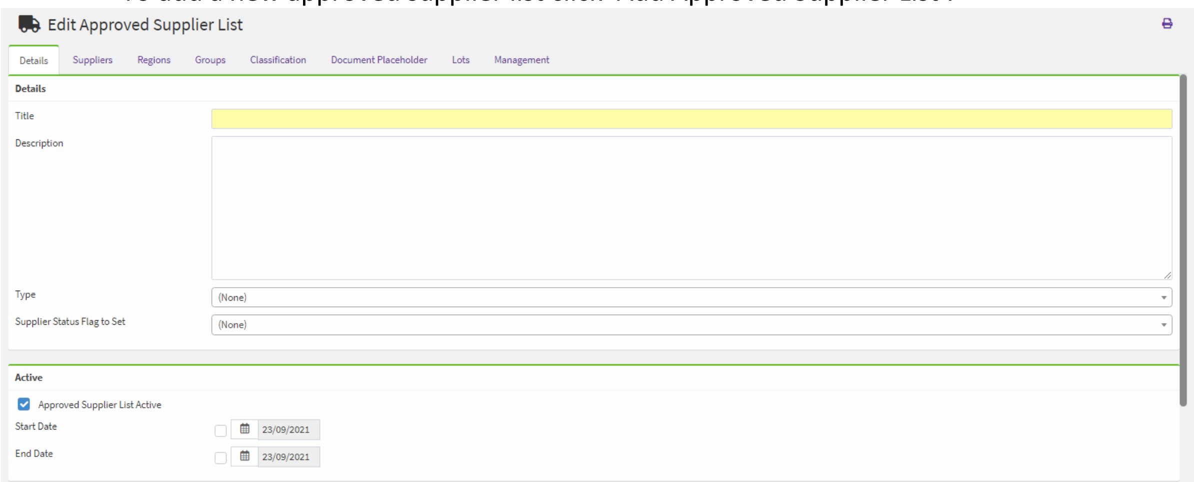
- Before you can create your DPS or Framework project, for purposes of the mini-competition element, an Approved Supplier List **must** be created first. This is so that when the suppliers are marked as ‘Accepted’ within the DPS or Framework master project, they are automatically added to the approved supplier list(s) and subsequently to any mini-competition projects which you run.
- From the Home Page click on ‘View / Create Approved Supplier Lists’.
- To create or view an Approved Supplier List, click on the 'Add Approved Supplier List' button.



  - You will then be presented with this overview screen.



- To add a new approved supplier list click ‘Add Approved Supplier List’.



- You will then be required to fill in different tabs before you can create your approved list.
- All mandatory fields are displayed in yellow.

Details tab

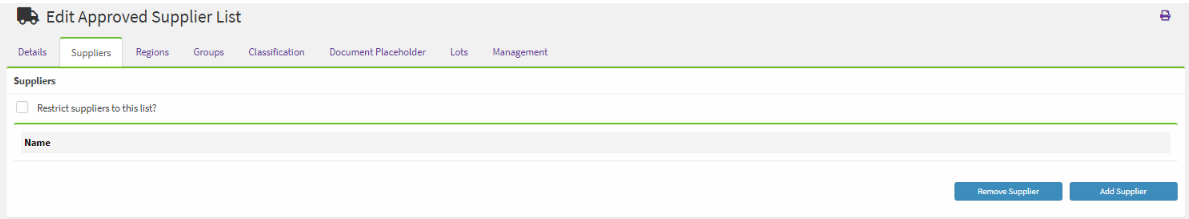
- **Title:** - Enter a name for the DPS / Framework Approved supplier list
- **Description:** - Enter a description of your approved supplier list.
- **Type:** - Select the approved supplier list type. The options are DPS, Framework or Open Framework.
- **DPS:** A Dynamic Purchasing System where providers can apply throughout thelifetime of the DPS or in rounds depending on how the DPS is being operated.
- **Framework (Closed):** A framework with one application stage.
- **Framework (Open):** A framework which has multiple joining points e.g. once a year.

- **Supplier Status Flag to Set:** The supplier status flags are available in the system for you to create status flags for your approved list to show on the supplier summary when they are active on the approved list. Leave this blank.
- **Approved Supplier List Active**: - Makes the list active to use. Leave this option ticked.
- **Start Date**: - Add the start date which your approved list can be used.
- **End Date**: - Add an end date for your approved supplier list. The end date should be consistent with the end date of the DPS / Framework master project. After the end date haspassed the Approved Supplier List will automatically become inactive.
- **Project Reference:** Allows for automatic referencing of the DPS / Framework competitions.

- **Note:** To activate the auto-reference the following code can be used **{ID}**, this will generatea unique number and can be used with a pre-fix or suffix e.g '**DPS/CallOff/{ID}**'
- **Main Customer:** Allows the Approved supplier list to be restricted to the assigned customer.
- **Directive:** Sets the default directive when used within a competition. You can amendbetween, Works, Services or Supplies.

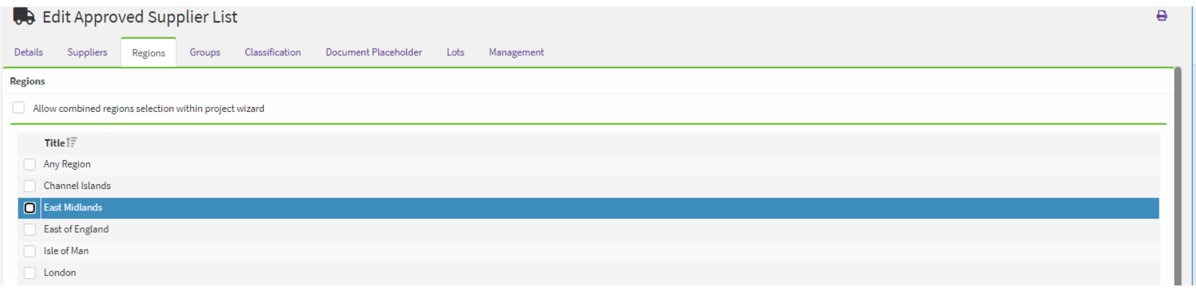
Suppliers tab

- Leave this tab blank. No suppliers should be added to this tab as the system will actively manage this area based on the supplier’s status as part of the master DPS or Framework project.
- You can also restrict suppliers to the list – ticking this option this means you’re not able to
- search the database for additional supplies when undertaking a mini-competition.



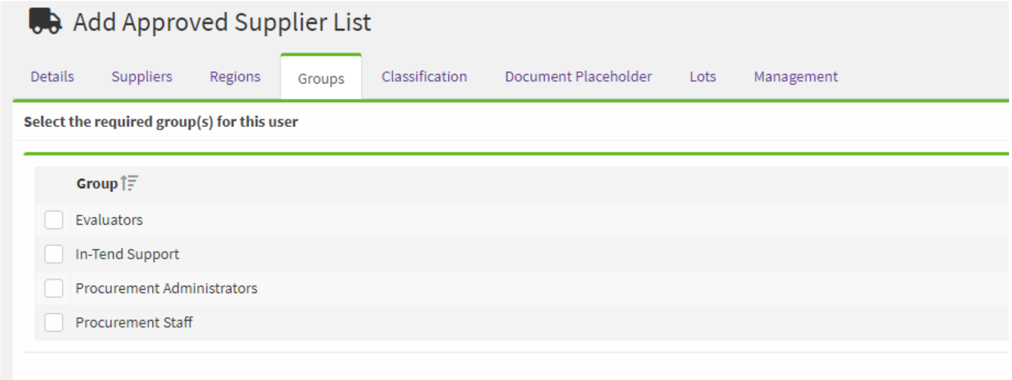
Regions tab

- If required, regions can be assigned to the approved supplier list.
- **Note:** The filtering of regions within the DPS competition is only available through use of the'Pop out Wizard' menu associated with the Dynamic Wizards functionality. When suppliers have been manually assigned to a region, the region selection can be used when creating a DPS / Framework competition.



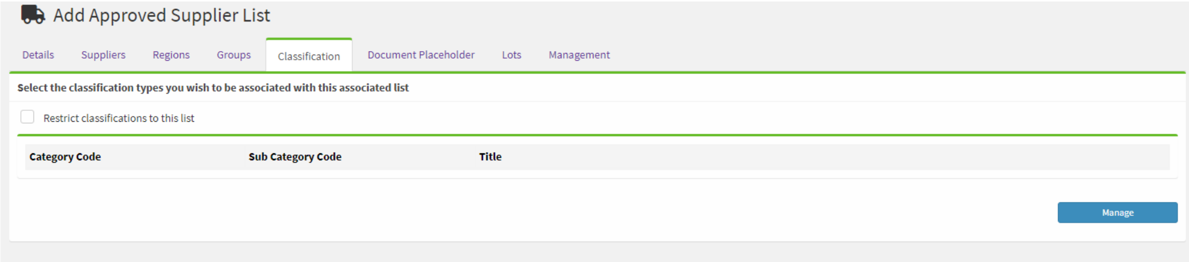
Groups tab

- On this tab, you will select the groups who can see and use the approved supplier list. Select
  ‘Procurement Staff’ and ‘Procurement Administrators’



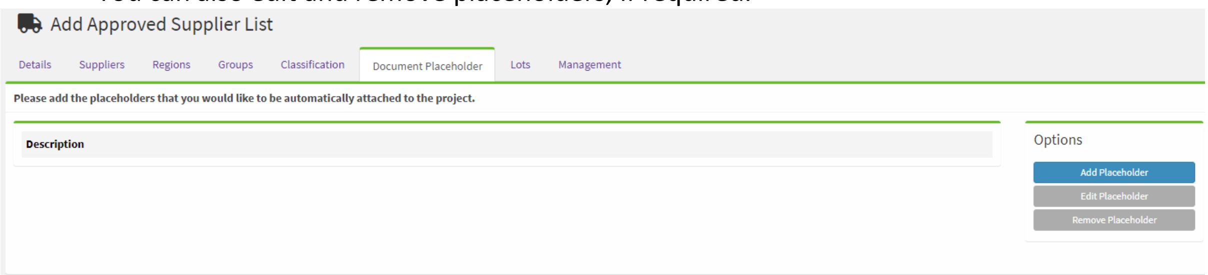
Classifications tab

- If required, classification codes can be assigned to the list. These will pre-populate the classification tab when a further competition is being created.
- To add a classification, click ‘Manage’, search your code(s) and click ‘Insert’ then ‘Ok’.
- The ‘Restrict Classifications to this list’ box can be left unticked. This setting restricts the classifications to only the ones chosen on the list and the users creating the further competitions will not be able to add any other classifications.



Document Placeholder tab

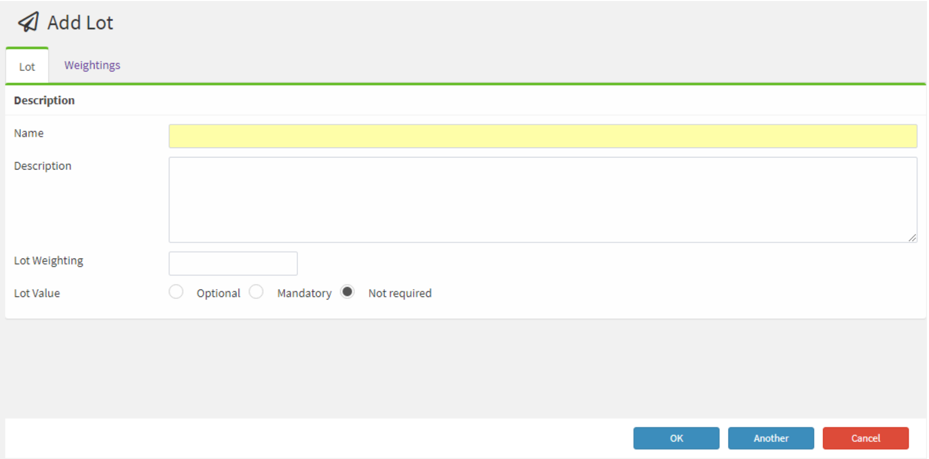
- If you would like any standard document placeholders adding to your approved supplier listwhen you create any further competitions, you can add them on this tab. For example, you may want to add a pricing placeholder which is always included by default.
- To add a placeholder, click ‘Add Placeholder’, enter the ‘Description’ and select which document group it’s connected to e.g. ‘Quality’ or ‘Price’.
- Click ‘Ok’.
- Create as many placeholders as you require.
- **Note:** you are still able to create individual placeholders within the mini-competition projectitself.
- You can also edit and remove placeholders, if required.



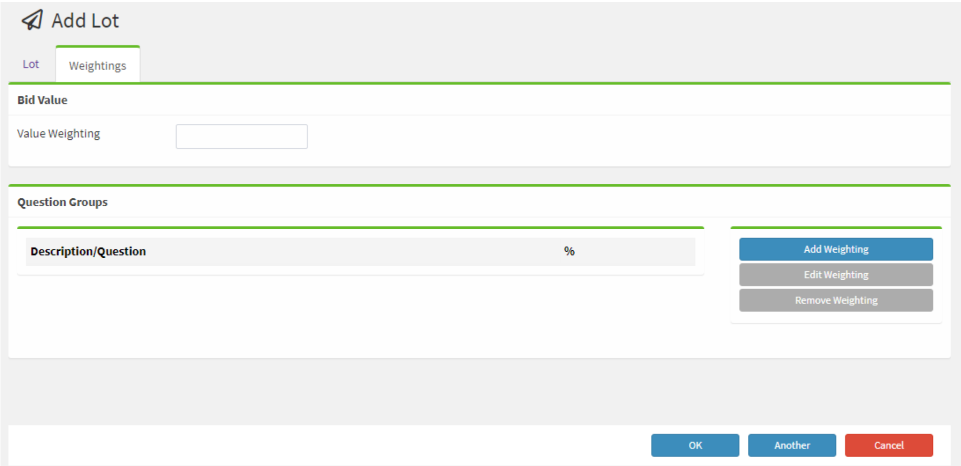
Lots tab

- If required a DPS / Framework can be split into lots. Use the lots tab to pre-create the lots that will be used within the master project.
- To add a Lot, click ‘Add Lot’.
- You are then required to enter the lot name.

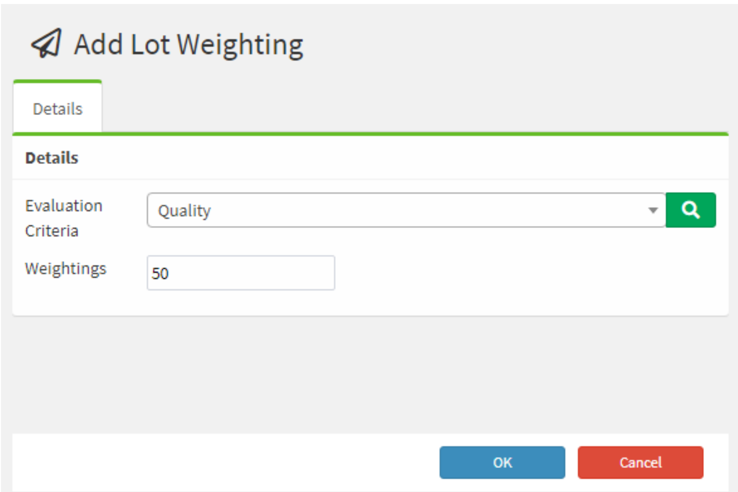
- If applicable, you are also able to add a lot description, weighting and also select whether alot value is required (optional, mandatory or not required).



- On the ‘Weightings’ tab, you can also add a ‘Value Weighting’ and also assign weightings to question groups.

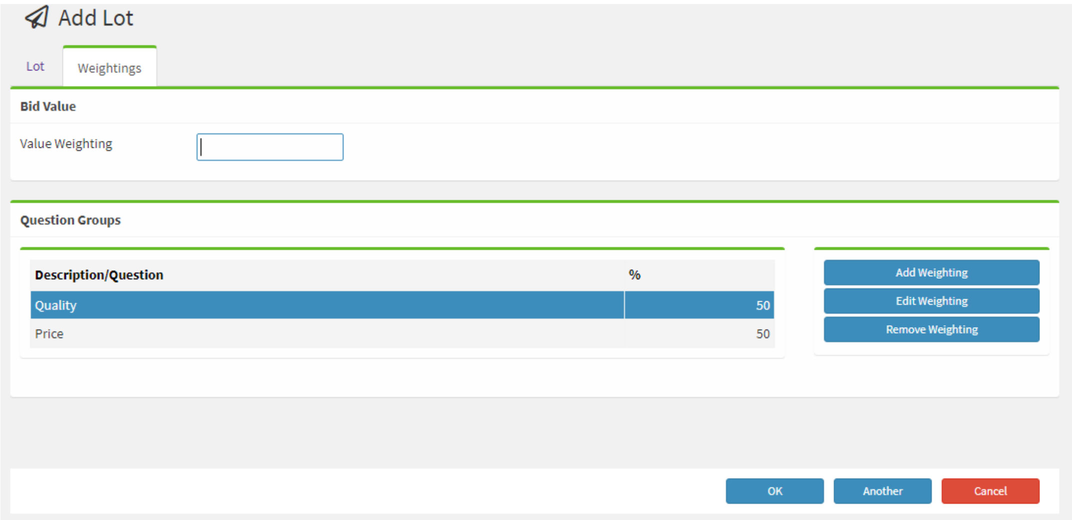


- To add a weighting to a question group, click ‘Add Weighting’.
- Select the ‘Evaluation Criteria’ and then enter the weighting.



Note – the weightings of all groups within the lot must total 100%.

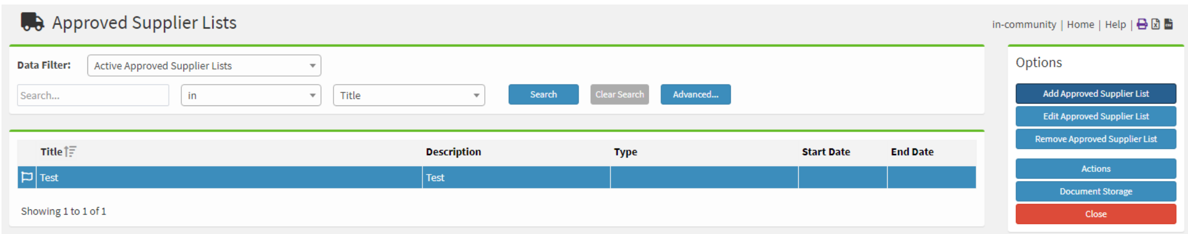
- Add as many evaluation criteria as required.



- You can edit or remove any weightings as well using the buttons to the right-hand side.
- Once you have added your question groups and applied a weighting totalling 100%, click
- ‘Ok’.
- Once you have entered your lot, click ‘Ok’ or ‘Another’ to add another lot.
- Add as many lots as required.
- You are able to amend, edit lots by using the buttons to the right-hand side or to move thelots up or down in the order.
  Note: You are also able to allow combined lot competitions within the project wizard. If you want to do this, select the option for ‘Allow combined lot competitions within project wizard’. This allows you to undertake a mini-competition using suppliers from multiple lots.

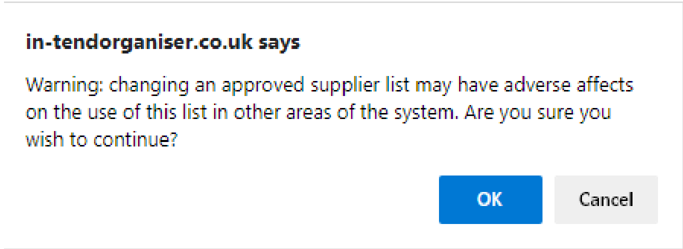
Management tab

- You can restrict the users who can manage the approved supplier list.
- If you want to do this, select the option for ‘Restrict management of Approved Supplier Listto specified users’ and then select which you would like to restrict the list to by clicking on the square next to their name. Select as many users as required.
  Note: you can amend any of the information connected to any of these tabs at any time.
- Once you are ready to create your approved list, click ‘Ok’ to the bottom right-hand corner of the pop-out screen.
  Note: when clicking ‘Ok’, it does not matter which tab you are viewing.
- After you click ‘Ok’, the page will refresh, and the approved list will then be displayed.
- To return to the home page, click ‘Close’.
- You are now able to create your master DPS / Framework project.



15. Edit an Approved Supplier List

- To edit your approved supplier list, after clicking on the ‘Approved Supplier List’ button from the home page, click ‘Edit Approved Supplier List’.
- You are then able to amend any of the information connected to any of the tabs.
- Once you have made your changes, click ‘Ok’.



- A pop-up message will appear to state that ‘changing an approved supplier list may have adverse effects on the use of this list in other areas of the system. Are you sure you wish to continue?’
- Click ‘Ok’.

  Note: You can also set ‘Actions’ and create folders / upload documents via the ‘Document Storage’ tab in relation to the approved supplier list.
- To return to the home page, click ‘Close’.

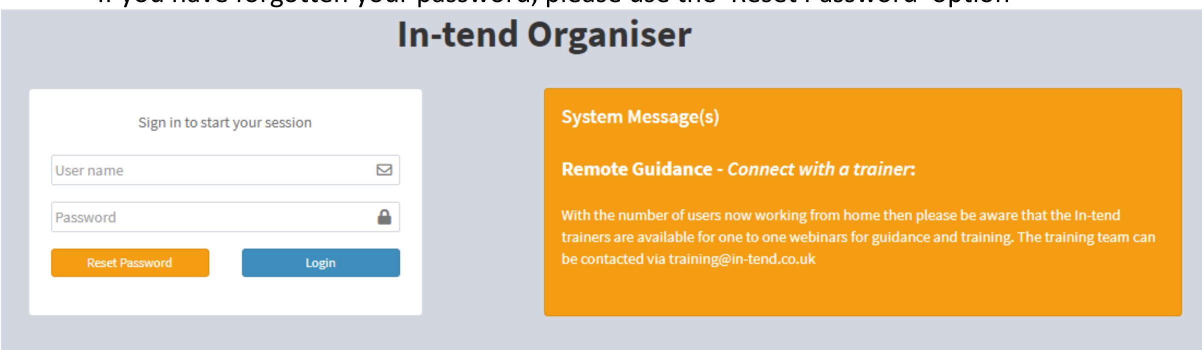
16. Remove an Approved Supplier List

- To remove an approved supplier list, after clicking on the ‘Approved Supplier List’ button from the home page and then selecting the relevant row you wish to remove, click ‘Remove Approved Supplier List’.
- The system will then present all of the tabs which will be greyed out and give you the option
- to ‘Remove’ the list at the bottom of the page.
- Click ‘Remove’ and a pop up will then appear to ask you whether you are sure that you wish
- to remove the record. Click ‘Ok’.
- Your list will be deleted.
- To return to the home page, click ‘Close’.

17. Other

Forgotten Password

- If you have forgotten your password, please use the ‘Reset Password’ option



- You will then be given a temporary password, which will need to be updated.

- Once you log in with your temporary password, you will be asked enter a new one of your choosing.
- The password format is a minimum of 6 characters in length and must contain:
    - A lower case letter
    - An upper case letter
    - A number
    - A special character e.g. !
- **Note** – if you enter your password incorrectly 3 times, your account will lock. If this happens, ask your system administrator (procurement@westnorthants.gov.uk) to unlock your account.

In-Tend Contact Details

In the first instance, please contact the procurement team to see if they can resolve your issue. However, if required, the contact details for the In-Tend helpdesk are as follows:

- **Telephone**: 0843 849 8404
- **Email**: support@in-tend.co.uk
- **Opening Hours**: Monday – Friday (08:30am – 17:00pm)