



## **Staffordshire County Council eSourcing Portal User Guide**

**Version 1.7**

**(29<sup>th</sup> September 2016)**

**These instructions have been produced to assist suppliers using the electronic sourcing platform. The County Council reserve the right to to update and re-issue the instructions with no prior notification to suppliers. Please note that the instructions are as accurate as possible and the County Council accepts no responsibility where the instructions differ from changes in the platform functionality.**

**This site operates best using Internet Explorer (versions 9 and above), or the latest versions of Safari, Firefox and Chrome. A screen resolution of 1024 x 768 or above is recommended.**

**For any urgent technical issues or forgotten passwords please use either the 'Contact Us' facility on the homepage or call Proactis direct on 0330 0050352**

**It is important that you call Proactis with any issues encountered submitting tenders, especially if you leave uploading until the last day. (not recommended)**



## Staffordshire County Council E-Tendering Portal User Guide

### Important Information - Points to remember

- It is the supplier's responsibility to ensure that a copy of ALL documentation is retained by the supplier prior to any submission.
- The supplier is required to download this document (and any other) from the portal to a secure location on their own server / computer drive. From this location the supplier is then able to populate and save the questionnaire as requested.
- Please ensure no individual attachment is greater than **10MB** in file/memory size.
- It is recommended that all submissions are PDF formatted prior to submission.
- Ensure that no uploaded portal attachments possess any software virus that prevents the County Council opening the documents post-deadline. Ensure also that any software media / file types used are commonplace to the County Council and that file types are not corrupt when uploaded. **It is always recommended to present documents in a PDF format to avoid such issues.** The County Council reserves the right to disqualify any tender submission which cannot be opened (for the reasons discussed) post-deadline.
- **NOTE** – it is the suppliers' responsibility to maintain an 'active' tender account throughout the process. Accounts tend to become inactive if a supplier mistakenly keys-in an incorrect password several times. It is not the responsibility of the Council to monitor the status of tenderer accounts. Please be aware that any tender communications may not be available to view if an account is inactive. In the first instance, please contact the Buyer direct to get the account re-instated. It is required that the supplier regularly checks the status of their tender accounts during a procurement. The Council is not responsible for any missed communications (or the consequences) due to inactive accounts or periods where suppliers take annual leave etc.
- It is the suppliers responsibility to update the eTendering portal with any changes in its staffing
- All returns must be made via the portal only and within the stated timescales.
- Suppliers are required to submit all clarification questions which arise during the Procurement period **in writing using the eTendering portal only**

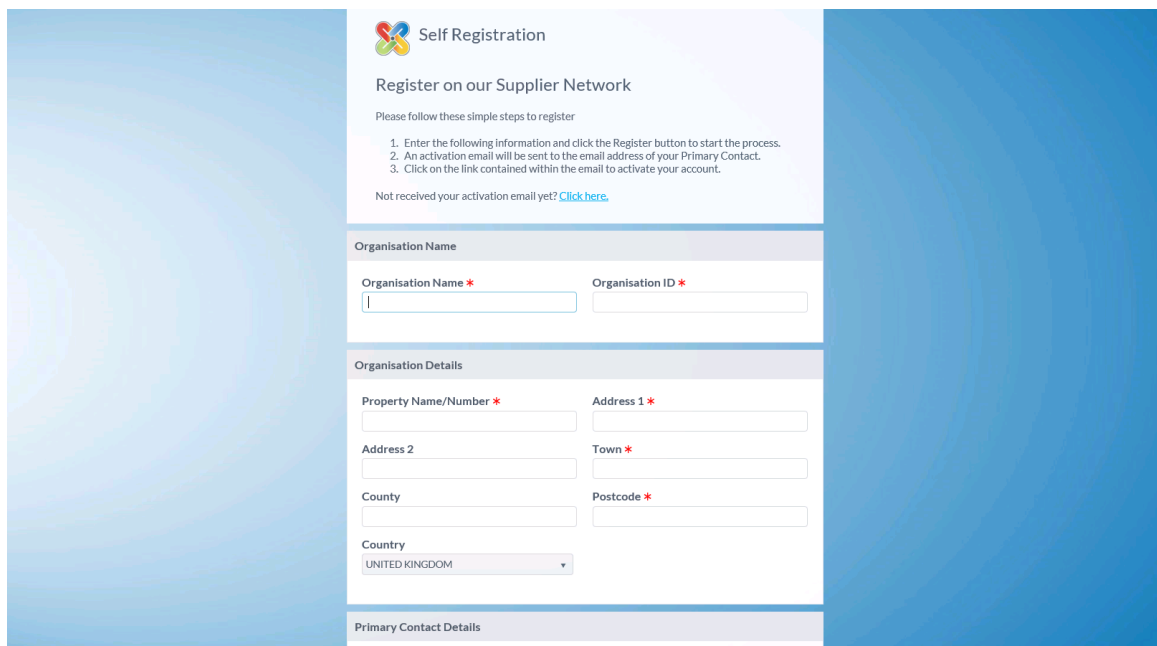
## 1. Supplier Self Registration

The portal can be found at <https://www.proactisplaza.com/>



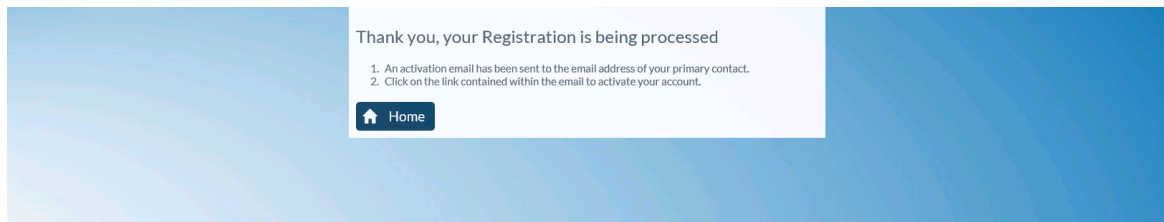
The screenshot shows the Proactis Sign In page. On the left, there is a 'Sign In' section with fields for 'Organisation ID', 'Login Name', and 'Password'. Below these is a 'Sign In' button and a link for 'Forgotten password?'. Further down is a 'Don't have an account? Sign up' link, which is highlighted by a black arrow. Below that is a 'Have you been invited?' section with an 'Access Code' field and a 'Go' button. On the right, there is a 'View Opportunities' button. The background features a large graphic of several overlapping arrows in various colors (blue, red, white, green, yellow) pointing in different directions. At the bottom, there are links for 'FAQs', 'Cookie Policy', 'Legal', 'Help', and 'Contact Us'.

Click 'Sign Up' and populate all the fields including the Organisation ID which is created by the user. All fields with an asterix (\*) are mandatory.



The screenshot shows the Proactis Self Registration page. At the top, there is a 'Self Registration' header with the Proactis logo. Below this is a 'Register on our Supplier Network' section with instructions: 'Please follow these simple steps to register'. The steps are: 1. Enter the following information and click the Register button to start the process. 2. An activation email will be sent to the email address of your Primary Contact. 3. Click on the link contained within the email to activate your account. Below the steps is a link: 'Not received your activation email yet? Click here.' The registration form is divided into sections: 'Organisation Name' with fields for 'Organisation Name \*' and 'Organisation ID \*'; 'Organisation Details' with fields for 'Property Name/Number \*', 'Address 1 \*', 'Address 2', 'Town \*', 'County', 'Postcode \*', and 'Country' (a dropdown menu currently showing 'UNITED KINGDOM'); and 'Primary Contact Details'.

Complete the information and click 'Register' at the bottom of the page. The system may ask you to confirm that your organisation is not already registered. Tick the appropriate box and continue. Or the system will explain that your account needs to be authenticated.



The system will send you an email. Check all mail boxes; including trash and spam. Click the link 'Click here to activate your account' in the email to return to the Portal and enter your details. It is important that you do this within 24 hours of receiving the email. Complete the fields and click 'Next'.

## Step One: Organisation Details


The screenshot shows the 'Self Registration | Organisation Details' form. At the top, there is a progress bar with 8 steps, where step 1 is currently active. The form is divided into two main sections: 'Organisation Details' and 'Construction Industry Scheme (CIS) Details'. The 'Organisation Details' section includes fields for 'Organisation ID' (pre-filled with 'SCC1'), 'Organisation Name' (pre-filled with 'SCC'), 'Registration Number' (with a 'Not Applicable' checkbox), 'VAT Number' (with a 'Not Applicable' checkbox), and 'DUNS Number' (with a 'Not Applicable' checkbox). To the right, under 'Organisation Type', there are several checkboxes: 'Public Company', 'Limited Liability Company', 'Partnership', 'Sole Trader', 'Limited Liability Partnership', 'Government Body', and 'Third Sector'. The 'Construction Industry Scheme (CIS) Details' section has a 'CIS Registration Type' dropdown menu set to 'None'. A blue arrow points from the 'Next' arrow in the progress bar to the 'Next' arrow in the progress bar.

Complete the fields or select 'Not Applicable'. Once complete click the next arrow to move onto step two. Your profile can be amended at any time after registration using the arrow icon in the top right corner.

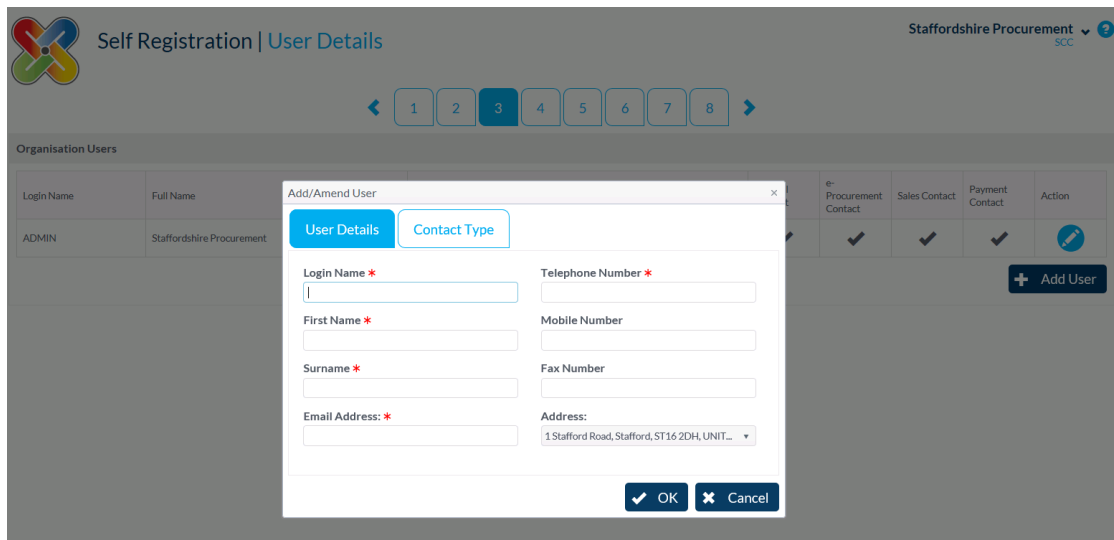
## Step Two: Addresses

If you wish to add more addresses click on 'Add Address' and populate the fields, click 'Ok' to save.

The screenshot shows the 'Self Registration | Address Details' form. At the top, there is a progress bar with 8 steps, where step 2 is currently active. The form is divided into two main sections: 'Organisation Addresses' and 'Address Details'. The 'Organisation Addresses' section shows a table with one address: '1 Stafford Road, Stafford, ST16 2DH, UNITED KINGDOM'. The 'Address Details' modal is open, showing fields for 'Property Name/Number', 'Town', 'Address 1', 'County', 'Address 2', 'Postcode', 'Address 3', 'Country' (pre-filled with 'UNITED KINGDOM'), and 'Address 4'. There are 'OK' and 'Cancel' buttons at the bottom of the modal. A blue arrow points from the 'Add Address' button in the background to the 'Add Address' button in the modal.

To amend an address, click the pencil . Work through the tabs. Click 'Ok' to save or 'Cancel' to close the box. Click 'Next' to move to Step Three.

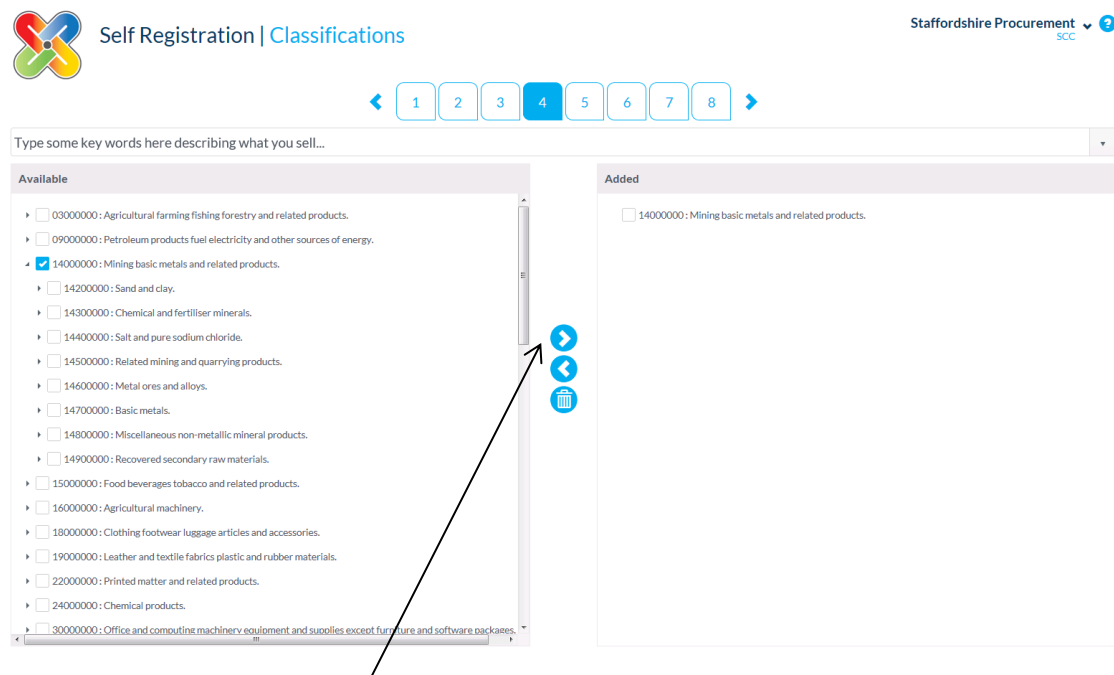
### Step Three: Users




Click 'Add User' to add additional staff to your account. Click 'Ok' to save or 'Cancel'. To edit details of an existing user, click the pencil underneath the Action tab or click 'Next' to move on.

### Step Four: What you Sell

The system uses CPV (Common Procurement Vocabulary) classification codes to identify what you sell. In the search box type key words that describe what you sell and click. The results will be displayed below.



Click on the arrows to add/remove the category to your profile. Repeat as required. Click  to move to the next step.

## Step 5: Buyer Selection



Self Registration | Buyers

Staffordshire Procurement SCC



Select Buyer Organisations					
Title	Town	Post Code	County	Country	
AB Ports	London	WC2B 4HN		UNITED KINGDOM	<input type="checkbox"/>
Bassetlaw District Council	Worksop	S80 2AH	Nottinghamshire	UNITED KINGDOM	<input type="checkbox"/>
Bedford Borough Council	Bedford	MK42 9AP	Bedfordshire	UNITED KINGDOM	<input type="checkbox"/>
Blaenau Gwent County Borough Council	Ebbw Vale	NP23 6XB		UNITED KINGDOM	<input type="checkbox"/>
Bridgewater Associates	Bridgewater			UNITED STATES	<input type="checkbox"/>
Bristol City Council	Bristol			UNITED KINGDOM	<input type="checkbox"/>
Cancer Research UK	London	EC2 5GT		UNITED KINGDOM	<input type="checkbox"/>
Cardiff Council	Cardiff	CF10 4UW		UNITED KINGDOM	<input type="checkbox"/>
Chartered Institute of Management Accountants	London	SW1P 4NP		UNITED KINGDOM	<input type="checkbox"/>
Civica Borough Council	Luton	LU4 8SP	Bedfordshire	UNITED KINGDOM	<input type="checkbox"/>
Coillte	Newtownmountkennedy		Co. Wicklow	IRELAND	<input type="checkbox"/>
Coventry City Council	Coventry	CV1 2PW		UNITED KINGDOM	<input type="checkbox"/>
East Midlands Strategic Commercial Unit	Arnold	NG5 8PP	Nottinghamshire	UNITED KINGDOM	<input type="checkbox"/>

This allows you to be included into a buyer's directory for private tender invites etc. Ensure that you select 'Staffordshire County Council' as a minimum by ticking the box. Click ➡ to move on.

## Step Six: Primary Contact Details



Self Registration | Primary Contact Details

Staffordshire Procurement SCC



Primary Contact Details	
Organisation Name	<input type="text" value="SCC"/>
Login Name	<input type="text" value="ADMIN"/>
First Name *	<input type="text" value="Staffordshire"/>
Surname *	<input type="text" value="Procurement"/>
Email Address: *	<input type="text" value="alison.morgan@staffordshire.gov.uk"/>
Telephone Number *	<input type="text" value="01785 854654"/>

The primary contact has overall administration rights for the supplier. Confirm the details are correct and click ➡ to move to Step Seven.

## Step Seven: Terms and Conditions



Self Registration | [Terms and Conditions](#)

Staffordshire Procurement [SCC](#) [?](#)



Terms and Conditions

PROACTIS GROUP LIMITED

USER LICENCE

YOU MUST READ THE FOLLOWING BEFORE CONTINUING

The use of the software provided by PROACTIS Group Limited is subject to the following User Licence. You must carefully read through the User Licence. By accepting the License you confirm that you have read the User Licence and that you agree to be bound by the terms and conditions of the User Licence at all times. If you are accepting the User Licence on behalf of a firm or corporate entity you warrant that you have the authority to do so.

If you do not agree to be bound by the User Licence you will not be able to activate and use the Software.

1. Definitions and INTERPRETATION

☐ I have read and understood the Terms and Conditions for using the Supplier Network

Tick to agree with the Terms and Conditions of using the Portal. Click [➤](#) to move to the final step.

## Step Eight: Complete Registration



Self Registration | [Finish](#)

Staffordshire Procurement [SCC](#) [?](#)

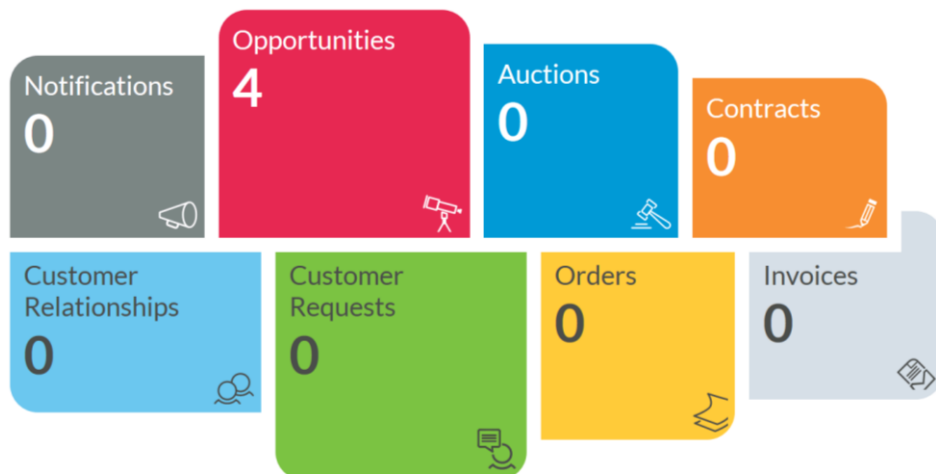


Your Login Details

Organisation Name	New Password * <a href="#">?</a>
SCC	
Organisation ID	Repeat Password
SCC1	
Login Name	
ADMIN	

[✔ Complete Registration](#)

Create your password which must be between 4 and 15 characters in length and contain at least 2 numbers. Passwords expire every 2 months. Then click [➤](#) you will then be brought to your homepage within the Portal.



## 2. Home Screen Explained

**Notifications** – Displays any buyer notifications that require your attention.

**Opportunities** – Displays opportunities from UK organisations which use Proactis, allows you to express an interest and submit your tender response.

**Auctions** – Displays available auctions

**Contracts** – Displays contracts awarded to your organisation

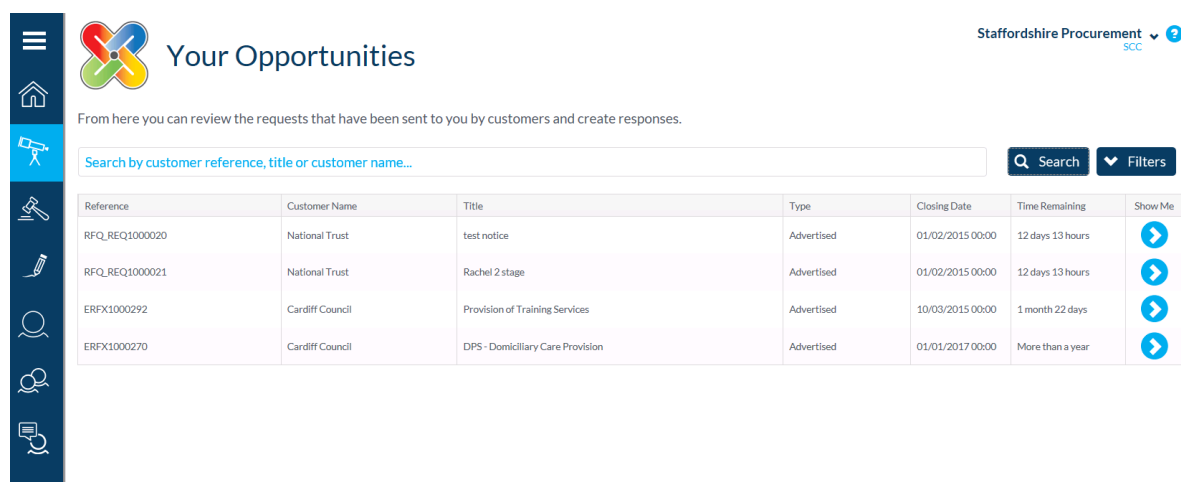
**Customer Relationships** – Search and manage trading requests between you and your customers

**Customer Requests** – Search and manage trading requests between you and your customers

**Orders** – Displays orders raised to your organisation.

**Invoices** – View, print and resend invoices to the customer.

## 3. Search for an Opportunity & Submit a Tender




From here you can review the requests that have been sent to you by customers and create responses.

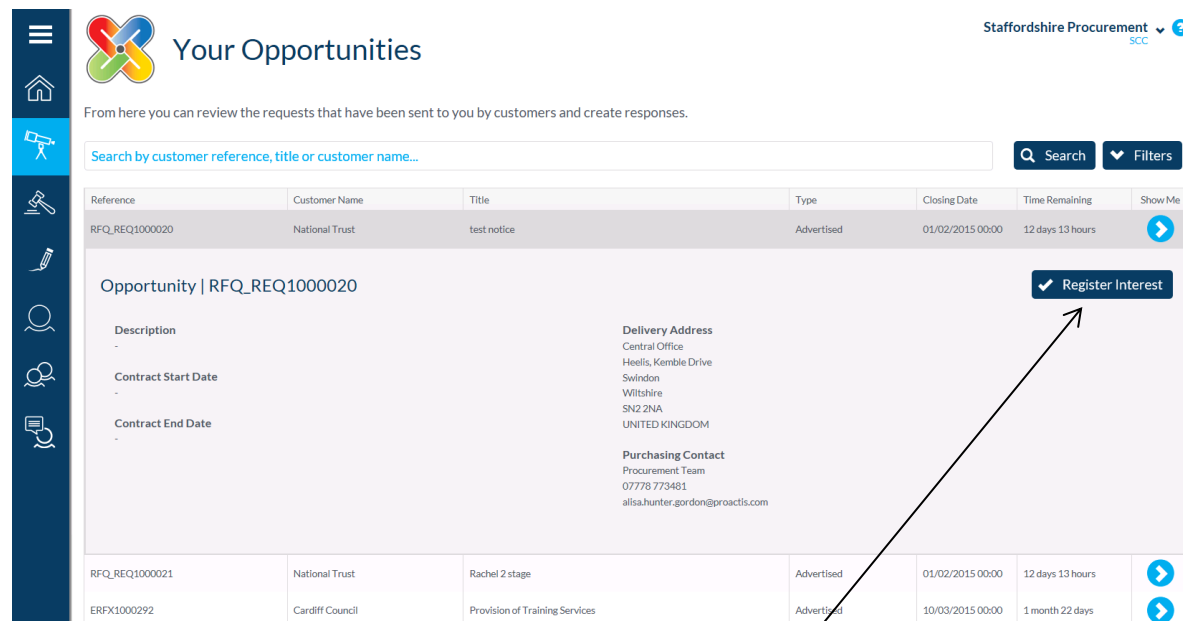
Search by customer reference, title or customer name...

Search Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
RFQ_REQ1000020	National Trust	test notice	Advertised	01/02/2015 00:00	12 days 13 hours	<a href="#">Show Me</a>
RFQ_REQ1000021	National Trust	Rachel 2 stage	Advertised	01/02/2015 00:00	12 days 13 hours	<a href="#">Show Me</a>
ERFX1000292	Cardiff Council	Provision of Training Services	Advertised	10/03/2015 00:00	1 month 22 days	<a href="#">Show Me</a>
ERFX1000270	Cardiff Council	DPS - Domiciliary Care Provision	Advertised	01/01/2017 00:00	More than a year	<a href="#">Show Me</a>




Select 'Opportunities' which will display current opportunities or search in the search box. Click the  to view more information and to register your interest in the tender.



**Your Opportunities** Staffordshire Procurement SCC

From here you can review the requests that have been sent to you by customers and create responses.

Search by customer reference, title or customer name... Search Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
RFQ_REQ1000020	National Trust	test notice	Advertised	01/02/2015 00:00	12 days 13 hours	

**Opportunity | RFQ\_REQ1000020** Register Interest



**Description**  
-

**Contract Start Date**  
-

**Contract End Date**  
-

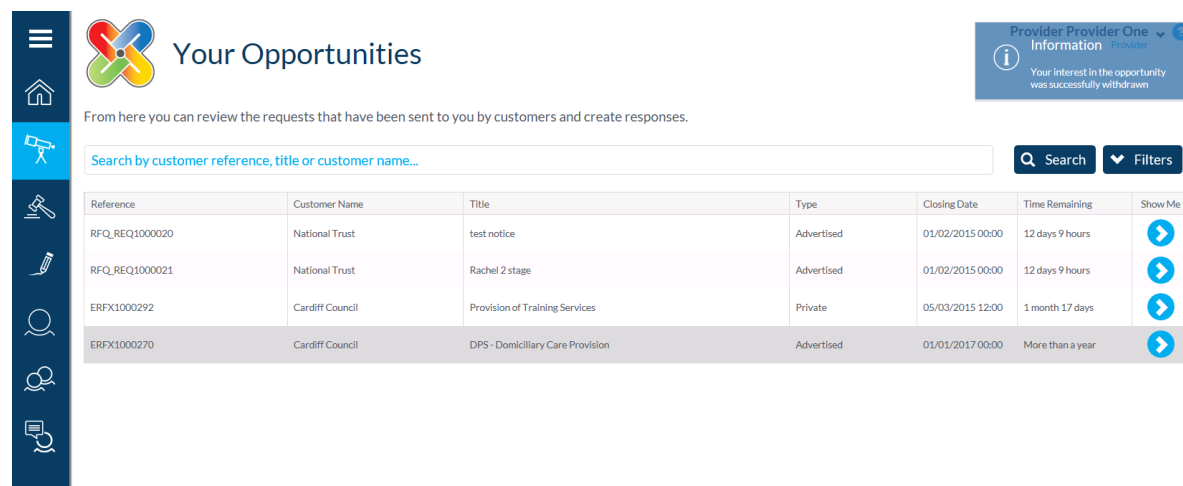
**Delivery Address**  
Central Office  
Heelis, Kemble Drive  
Swindon  
Wiltshire  
SN2 2NA  
UNITED KINGDOM

**Purchasing Contact**  
Procurement Team  
07778 773481  
alisa.hunter.gordon@proactis.com

RFQ_REQ1000021	National Trust	Rachel 2 stage	Advertised	01/02/2015 00:00	12 days 13 hours	
ERFX1000292	Cardiff Council	Provision of Training Services	Advertised	10/03/2015 00:00	1 month 22 days	

To express your interest against an opportunity, click 'Register Interest'. Your organisation will now receive any communication regarding that opportunity. When you go back to the 'Opportunities' page, your chosen tender will be labelled 'Private'.





#### 4. Create a Response




**Your Opportunities** Provider Provider One Information

From here you can review the requests that have been sent to you by customers and create responses.

Search by customer reference, title or customer name... Search Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
RFQ_REQ1000020	National Trust	test notice	Advertised	01/02/2015 00:00	12 days 9 hours	
RFQ_REQ1000021	National Trust	Rachel 2 stage	Advertised	01/02/2015 00:00	12 days 9 hours	
ERFX1000292	Cardiff Council	Provision of Training Services	Private	05/03/2015 12:00	1 month 17 days	
ERFX1000270	Cardiff Council	DPS - Domiciliary Care Provision	Advertised	01/01/2017 00:00	More than a year	

Click  next to the opportunity that you have already registered interest for to show the actual tender.

**Your Opportunities** Staffordshire Procurement SCC

From here you can review the requests that have been sent to you by customers and create responses.

Search by customer reference, title or customer name...

**Search** **Filters**

Closing Date From:  **Response Status:** Any ☐ Include Expired?

**Announcement Type:** Any **Registered Interest?:** Yes

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
RFQ_REQ1000020	National Trust	test notice	Advertised	01/02/2015 00:00	11 days 8 hours	<a href="#">➔</a>
RFQ_REQ1000021	National Trust	Rachel 2 stage	Advertised	01/02/2015 00:00	11 days 8 hours	<a href="#">➔</a>
ERFX1000292	Cardiff Council	Provision of Training Services	Private	05/03/2015 12:00	1 month 16 days	<a href="#">➔</a>
ERFX1000270	Cardiff Council	DPS - Domiciliary Care Provision	Advertised	01/03/2017 00:00	More than a year	<a href="#">➔</a>

You can use the 'Filters' button to search only for the tenders that you have expressed an interest in by amending the drop down box.

**Your Response | SRES1000003** SP Tender SP Tender Test

[Decline](#) [Messages](#) [Validate](#) [Save](#) [Submit](#)

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

[General](#) [Attachments](#)

**Request Documents (22)**

**About You**

Please use this text area to provide additional information

**Request Overview**

**Request | SREQ1000004**

<b>Customer Name</b> Staffordshire County Council	<b>Allow multiple responses?</b> No
<b>Title</b> ST261 - PROVISION OF THE COUNTY FARMS SOLAR PV	<b>Allow response re-submit before deadline?</b> Yes
<b>Description</b> CONTRACT FOR THE PROVISION OF THE COUNTY FARMS SOLAR PV PROJECT Staffordshire County Council recognises the need to achieve its share of national renewable energy targets and	<b>Delivery Date</b> 07 April 2015
	<b>Delivery Address</b>

Download and read the 'Request Documentation' that the buyer has provided as part of the tender. Some of the documents need to be completed and returned to the buyer. The documents should be saved to your own computer to allow you to work on the opportunity

## 5. Returning a response

To do this supplier's should navigate back to the opportunity. To return a response you need to do this via the 'Attachments' button.

**Your Response | SRES1000003**

Decline Messages Validate Save Submit

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General Attachments

Request Documents (22)

About You

Please use this text area to provide additional information

Request Overview

Request | SREQ1000004

Customer Name: Staffordshire County Council

Title: ST261 - PROVISION OF THE COUNTY FARMS SOLAR PV

Description: CONTRACT FOR THE PROVISION OF THE COUNTY FARMS SOLAR PV PROJECT

Staffordshire County Council recognises the need to achieve its share of national renewable energy targets and

Allow multiple responses? No

Allow response re-submit before deadline? Yes

Delivery Date: 07 April 2015

Delivery Address

Under the “Your Files” section, choose the attachment type then press the “**Attach Files**”, this will lead you through the process. Once the file has been attached press “**Upload Files**”.

**Your Response | SRES1002258**

Decline Messages Validate Save Draft Submit

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General Attachments

If required please use the options below to add Attachments to your response. Select an attachment type, add or drag and drop a file and then click 'Upload files'.

Your Files

Attachment Type: General Document

Attach files...

Or drag and drop files here

ITT Part 2 Compulsory Questionnaire.docx

Upload files

Uploaded Files




Name	Type	Download	Remove
No items to display			


**Failure to select both “attach” and “upload” for each document will result in documents not being submitted. Please note the submit button will still function irrespective of whether documents are attached or not.**

If after you have selected the “Upload Files” button and your document gets a red bar across the document name then this file has **NOT** uploaded and therefore it will not have been uploaded or submitted.

**Please Note:** The Proactis system does not allow you to directly upload macro-enabled Excel documents, i.e. those files which have an extension .XLSM. Should you need to do this then please ZIP the Excel file, which the system will then readily accept.







## Your Opportunities



From here you can review the requests that have been sent to you by customers and create responses.



OK, response 'SRES1000866' submitted!



SP Tender  
SP Tender Test

 Search
  Filters

12 | Page

**Suppliers must ensure that the documents they wish to submit to the County Council are listed under the uploaded files section.**

Once submitted you will receive a reference number / green flag (as shown above) together with a confirmation email as shown here: -



The contents of this e-mail and any attachments may be confidential. It is intended for the named recipients only. If you are not the named recipient, please notify the sender and do not disclose the contents to any other party.

Please consider the environment before printing this email

**From:** [noreply@proactis.com](mailto:noreply@proactis.com) [<mailto:noreply@proactis.com>]  
**Sent:** 25 August 2015 14:14  
**To:** Staffordshire Procurement  
**Subject:** Supplier Network Response Submission

The Buyer has received your Response to this Opportunity. Please make a note of the Response Number for your records:

Buyer's Request Number: SREQ1000045  
Your Response Number: SRES1000866  
Date Submitted: 25/08/2015  
Submitted By: SP Tender

**Please retain this email as evidence of submission** as without it the Council or Proactis cannot progress any investigation into any perceived irregularity in submissions. Please check all inboxes including spam folders for this email each time you 'submit'.

**Please Note:** The County Council highly recommend that once a Supplier has clicked the **Submit** button that they return back to the opportunity to check that the documents which they wish to submit are visible under the **"Attachments"** section.

This can be done by selecting the **"show me"** button of the opportunity from the **"Opportunities"** tab on the home page and then selecting **"Attachments"**

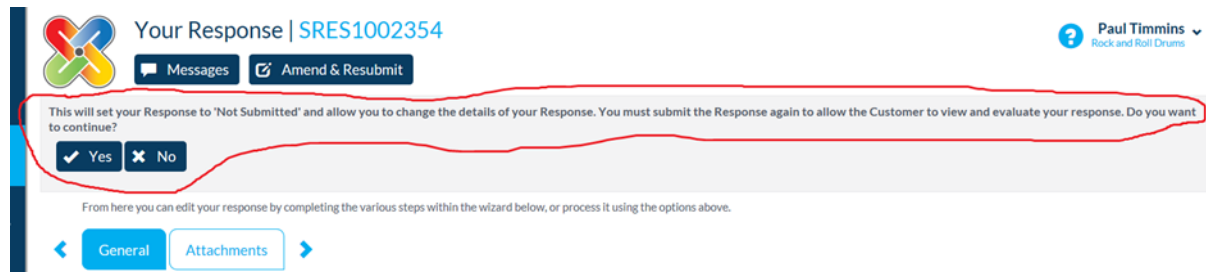
## 6. Retracting and resubmitting a Bid

The portal allows suppliers to retract and resubmit a bid if required. When you return to the portal your response will have the following:

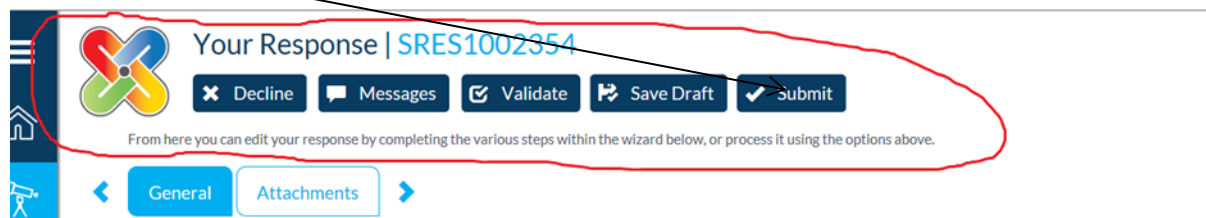
A screenshot of a web interface titled 'Your Response | SRES1002354'. It features a logo on the left and two buttons: 'Messages' and 'Amend & Resubmit'. The 'Amend & Resubmit' button is highlighted with a red circle. Below the buttons is a text instruction: 'From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.' There are two tabs: 'General' and 'Attachments', with 'Attachments' being the active tab. Below the tabs are two expandable sections: 'Request Documents (13)' and 'About You'. The 'About You' section contains a text area with the placeholder text 'Please use this text area to provide additional information'.

Once the **"Amend & Resubmit"** button has been clicked all attachments previously uploaded will be removed from the buyers view, the information message shown below warns suppliers **"This will set your Response to "NOT SUBMITTED" and allows you to change the details of your Response."**

**You MUST submit the Response again to allow the Customer to view and evaluate your response. Do you want to continue?"**



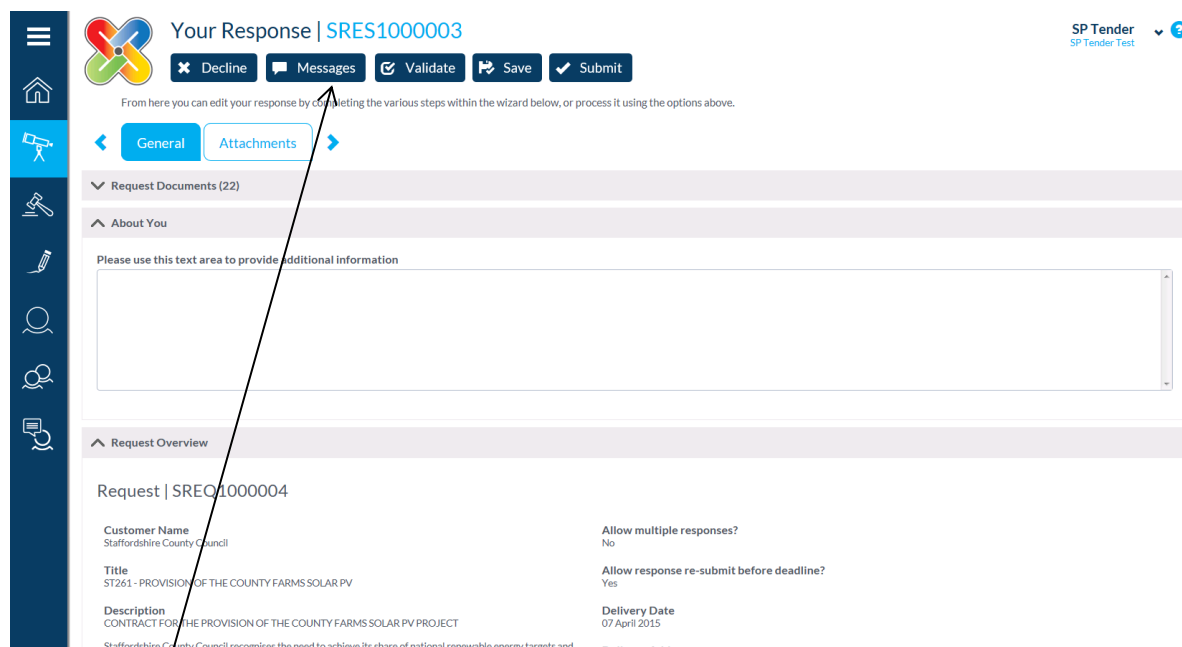
On selecting “**Yes**” you will remove your submitted bid from the County Councils view and you will be required to submit the bid again.



Please note that If you abort the screen at this stage for any reason without selecting the “**SUBMIT**” button you will have submitted **NO** bid.

## 7. To View or Send a Message/Clarification

Locate the tender you wish to raise a clarification about following the steps above.



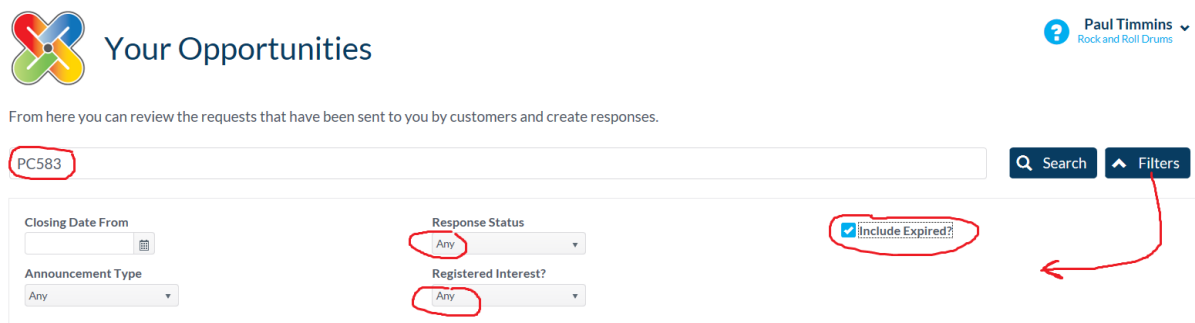
Select ‘Messages’ and complete the boxes as required followed by ‘Send’. The buyer response will also be displayed here.

**Suppliers are advised to periodically check the system for messages from the buyer and not be reliant on email prompts from the system**

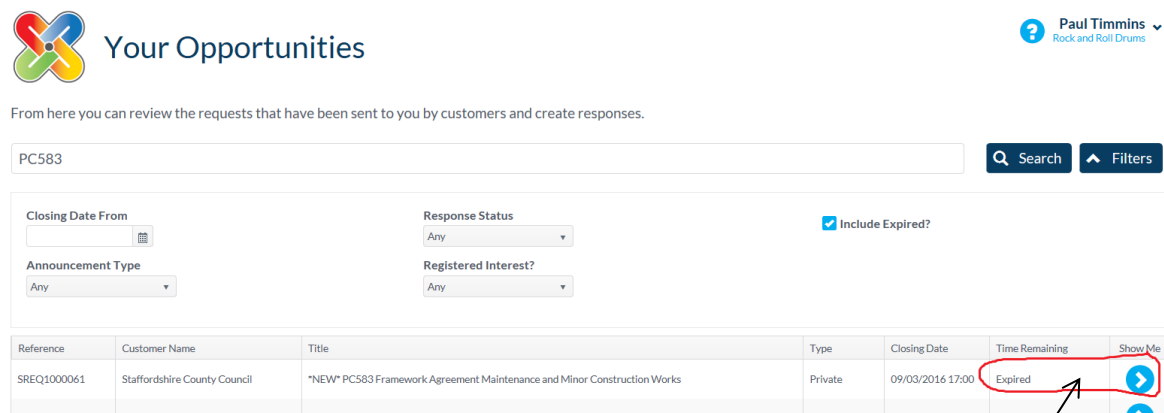
## 8. Viewing Submitted Documents Pre/Post Tender Deadline

If required, Suppliers can view submitted documents pre/post the tender deadline by doing the following:-

From the home screen select “**Opportunities**”, ensure ‘**Filters**’ is pressed, and then ensure the menus and tick box is checked as follows: -



Enter your project number (PC583 is the example here) and hit ‘Search’ to show the following: -



Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
SREQ1000061	Staffordshire County Council	*NEW* PC583 Framework Agreement Maintenance and Minor Construction Works	Private	09/03/2016 17:00	Expired	Show Me

If you are looking for the project post tender deadline the project should show as ‘**Expired**’ with the ‘**Show Me**’ link next to it. Press ‘**Show Me**’: -

If you are searching pre tender deadline, then the opportunity will be displaying the time remaining before deadline.

Press ‘**Attachments**’. This will display the documents that the buyer should have received when it was opened after the deadline: -

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

[General](#) [Attachments](#)

Request Documents (8)

About You

Please use this text area to provide additional information

Request Overview






Request | SREQ1000061

You may also have more documents on separate screens as shown by the prompts circled in red below.

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

[General](#) [Attachments](#)

Your Files

Uploaded Files		
Name	Type	Download
003 PCS83 Specification and Memorandum of Understanding (120216)	General Document	
001 PCS83 ITT Procurement Pack - (120216)	General Document	
002 PCS83 ITT Questionnaire - RETURN TO BUYER (030216)	General Document	
005 PCS83 Lot 1 - Pricing (Building) - RETURN TO BUYER (040316) version 2	General Document	
006 PCS83 Lot 2 - Pricing (Mechanical) xxxxxxxxxxxxxxxx- RETURN TO BUYER (040316) version 2	General Document	

1 - 5 of 6 Items