



Staffordshire County Council eSourcing Portal User Guide

Version 1.11

(6th February 2018)

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

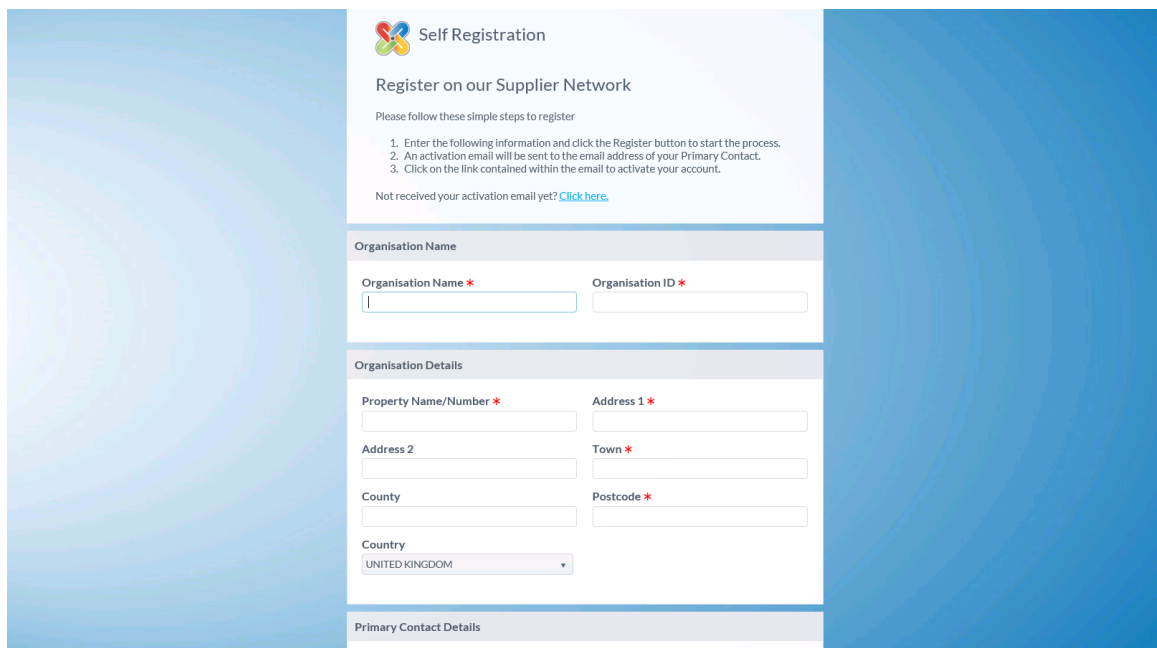
- It is the supplier's responsibility to ensure that a copy of ALL documentation is retained by the supplier prior to any submission.
- The supplier is required to download this document (and any other) from the portal to a secure location on their own server / computer drive. From this location the 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 note for suppliers' who are subsidiaries or franchises of an organisation you will need to have your own email account and register for a password unique to your organisation.
- 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**
- Suppliers who decide that they do not wish to apply for an opportunity once they have registered an interest can decline the opportunity. This makes the supplier "inactive" on the opportunity and you will no longer receive dialogues or alerts for that opportunity.

1. Supplier Self Registration

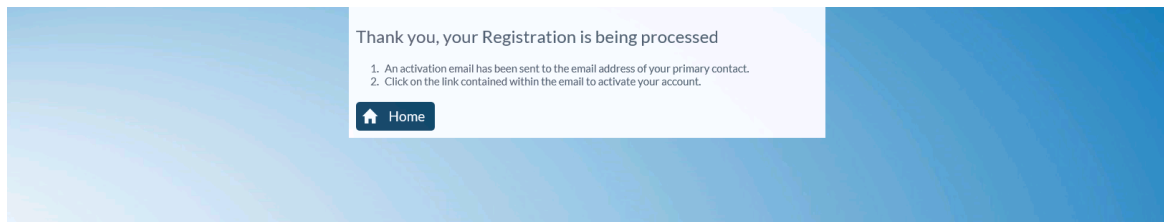
The portal can be found at <https://www.proactisplaza.com/>



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



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'. In the 'Organisation Details' section, there are input fields for 'Organisation ID', 'Organisation Name', 'Registration Number', 'VAT Number', and 'DUNS Number', each with a 'Not Applicable' checkbox. To the right, there is a list of 'Organisation Type' options: Public Company, Limited Liability Company, Partnership, Sole Trader, Limited Liability Partnership, Government Body, and Third Sector. The '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.

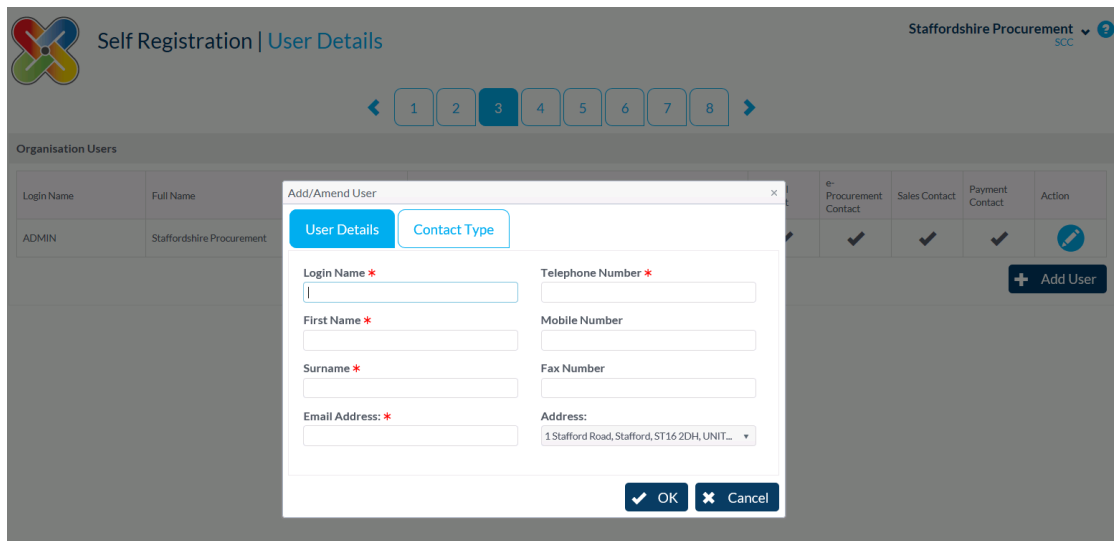
Step Two: Addresses

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 displays a table of 'Organisation Addresses' with one address listed: '1 Stafford Road, Stafford, ST16 2DH, UNITED KINGDOM'. An 'Address Details' modal is open, showing fields for 'Property Name/Number', 'Town', 'Address 1', 'County', 'Address 2', 'Postcode', 'Address 3', 'Country' (set to 'UNITED KINGDOM'), and 'Address 4'. The modal has 'OK' and 'Cancel' buttons. In the background, there is a table with columns 'Enabled' and 'Action', and an 'Add Address' button.

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.

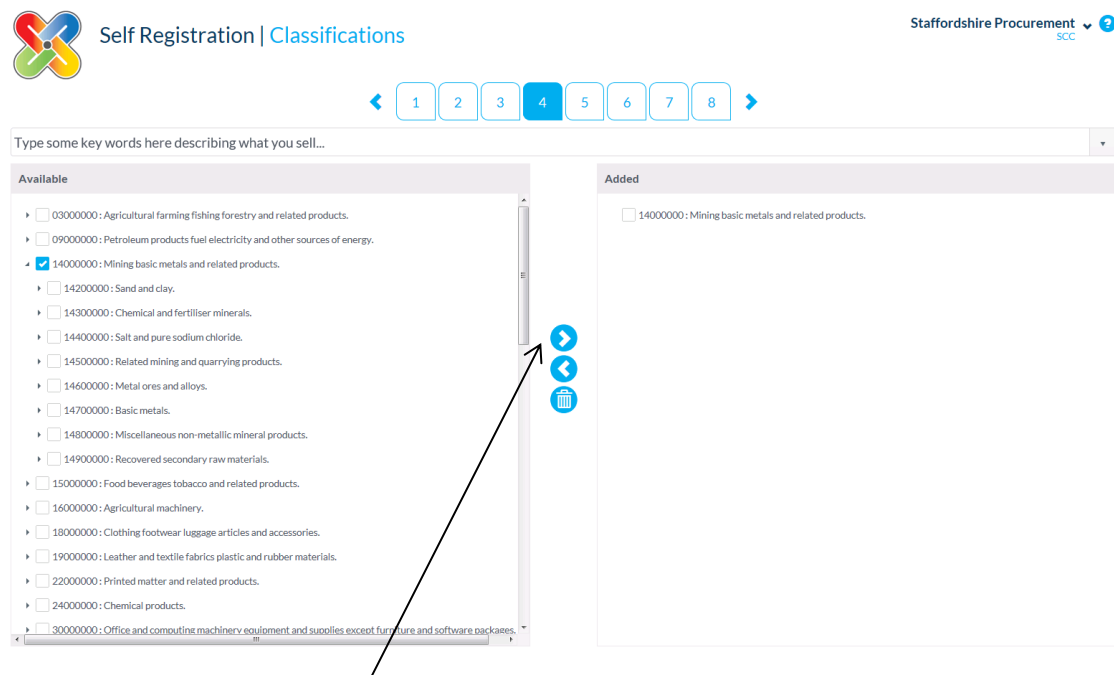
Step Three: Users



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	☐
Bassetlaw District Council	Worksop	S80 2AH	Nottinghamshire	UNITED KINGDOM	☐
Bedford Borough Council	Bedford	MK42 9AP	Bedfordshire	UNITED KINGDOM	☐
Blaenau Gwent County Borough Council	Ebbw Vale	NP23 6XB		UNITED KINGDOM	☐
Bridgewater Associates	Bridgewater			UNITED STATES	☐
Bristol City Council	Bristol			UNITED KINGDOM	☐
Cancer Research UK	London	EC2 5GT		UNITED KINGDOM	☐
Cardiff Council	Cardiff	CF10 4UW		UNITED KINGDOM	☐
Chartered Institute of Management Accountants	London	SW1P 4NP		UNITED KINGDOM	☐
Civica Borough Council	Luton	LU4 8SP	Bedfordshire	UNITED KINGDOM	☐
Coillte	Newtownmountkennedy		Co. Wicklow	IRELAND	☐
Coventry City Council	Coventry	CV1 2PW		UNITED KINGDOM	☐
East Midlands Strategic Commercial Unit	Arnold	NG5 8PP	Nottinghamshire	UNITED KINGDOM	☐

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	SCC
Login Name	ADMIN
First Name *	Staffordshire
Surname *	Procurement
Email Address: *	alison.morgan@staffordshire.gov.uk
Telephone Number *	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

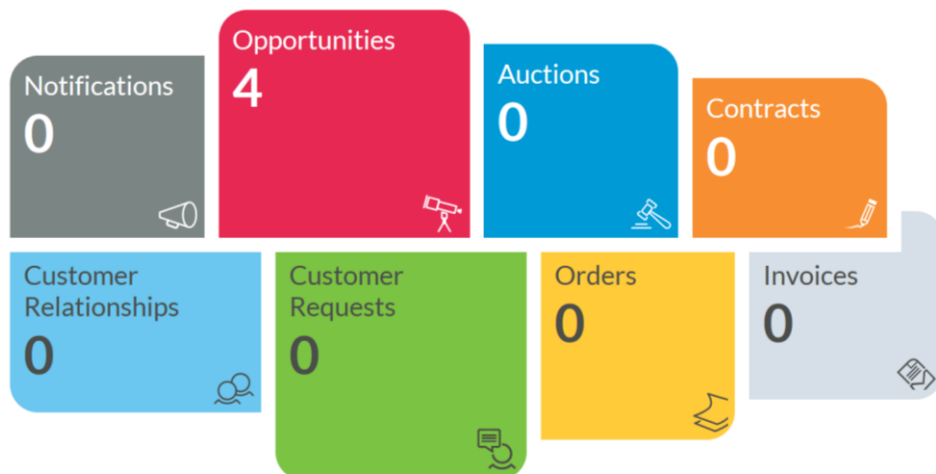


Your Login Details

Organisation Name	New Password *
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

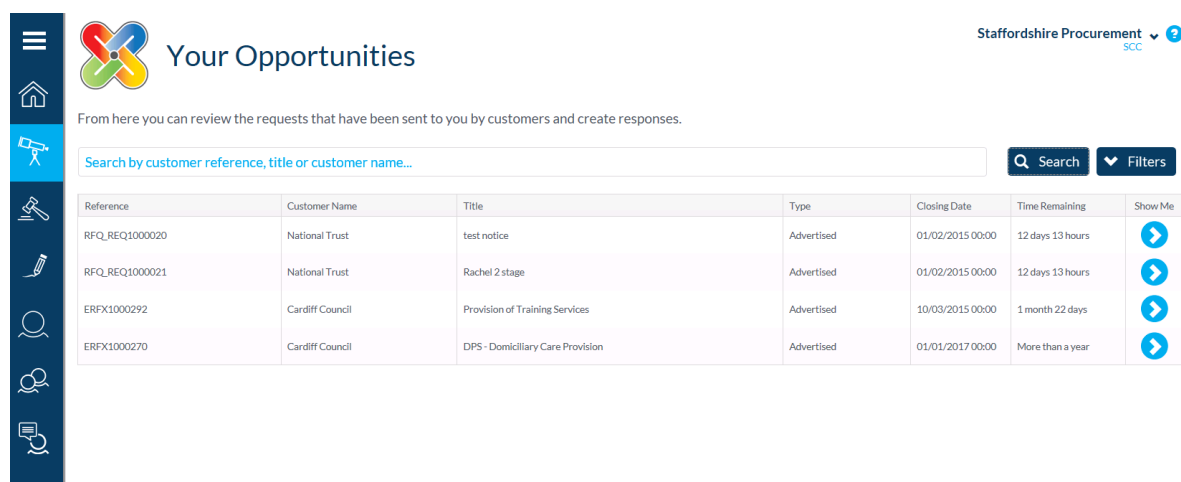
Customer Relationships – Search and manage trading requests between you and your customers

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



Your Opportunities

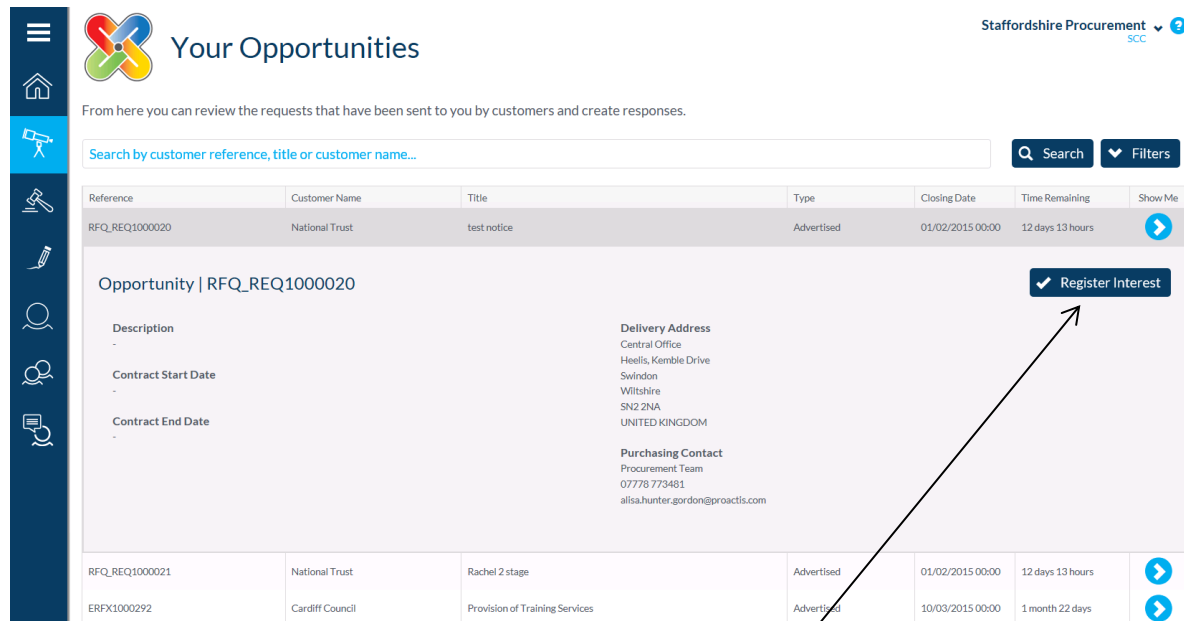
From here you can review the requests that have been sent to you by customers and create responses.

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	View
RFQ_REQ1000021	National Trust	Rachel 2 stage	Advertised	01/02/2015 00:00	12 days 13 hours	View
ERFX1000292	Cardiff Council	Provision of Training Services	Advertised	10/03/2015 00:00	1 month 22 days	View
ERFX1000270	Cardiff Council	DPS - Domiciliary Care Provision	Advertised	01/01/2017 00:00	More than a year	View

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...

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

Description
-

Contract Start Date
-

Contract End Date
-

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

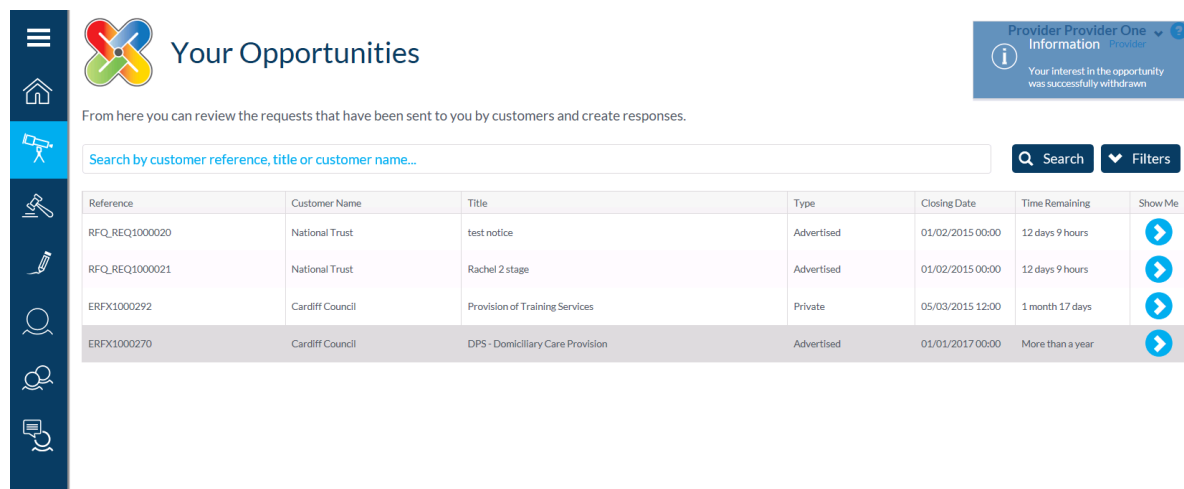
Purchasing Contact
Procurement Team
07778 773481
alisa.hunter.gordon@proactis.com

Register Interest

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...

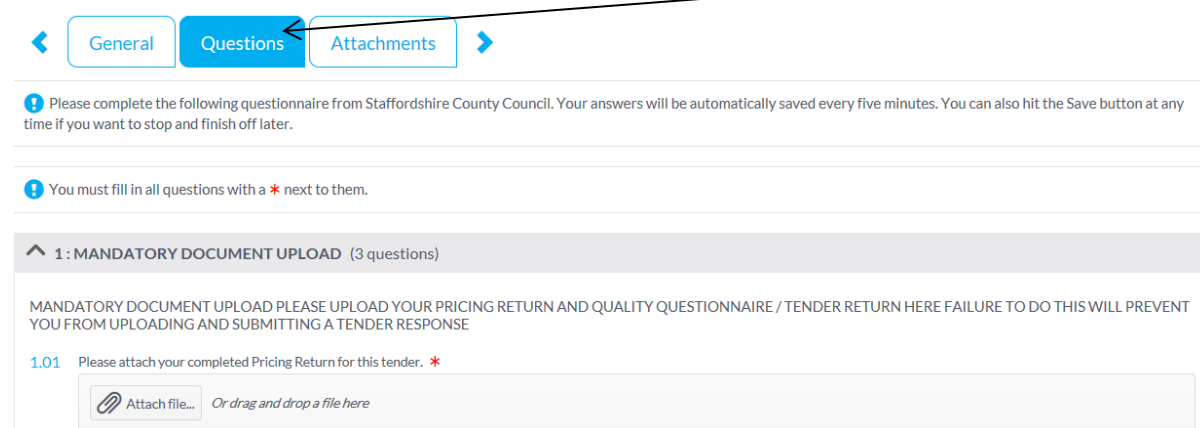
Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
RFQ_REQ1000020	National Trust	test notice	Advertised	01/02/2015 00:00	12 days 9 hours	
RFQ_REQ1000021	National Trust	Rachel 2 stage	Advertised	01/02/2015 00:00	12 days 9 hours	
ERFX1000292	Cardiff Council	Provision of Training Services	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.

5. Returning a response

To do this supplier's should navigate back to the opportunity.

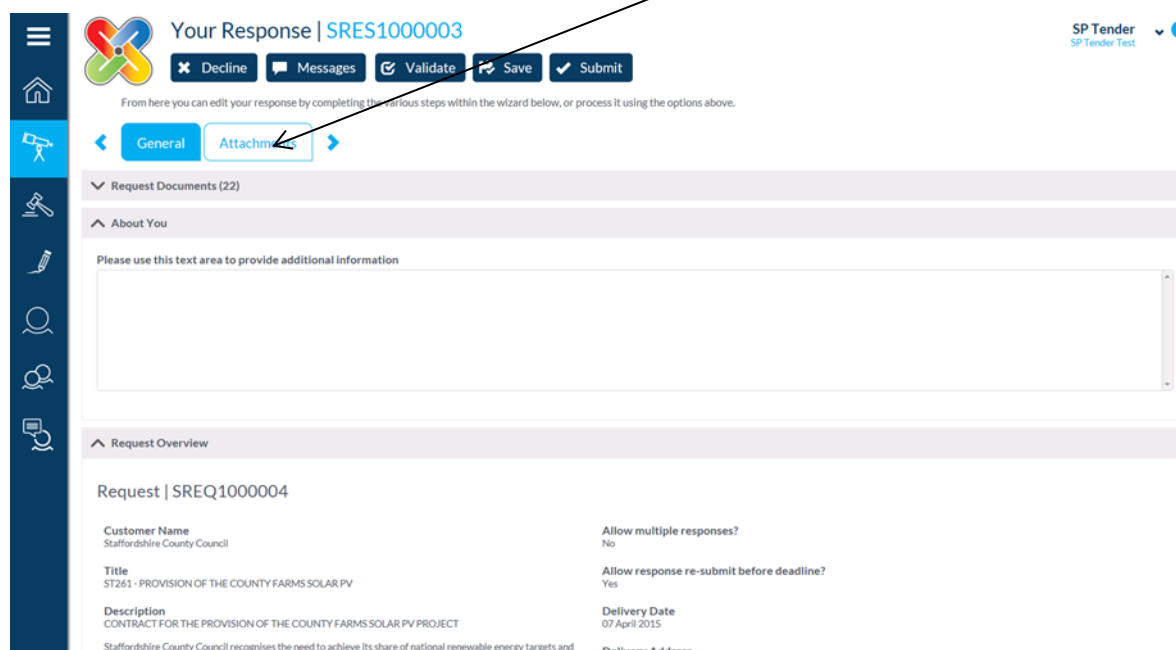
Suppliers should ensure that you have completed any questions from under the questions tab



The screenshot shows the 'Questions' tab selected in a navigation bar with 'General' and 'Attachments' tabs. Below the tabs, there are two informational messages: one about automatic saving every five minutes and another stating that all questions must be filled in, marked with a red asterisk. The main section is titled '1: MANDATORY DOCUMENT UPLOAD (3 questions)'. It contains a heading 'MANDATORY DOCUMENT UPLOAD PLEASE UPLOAD YOUR PRICING RETURN AND QUALITY QUESTIONNAIRE / TENDER RETURN HERE FAILURE TO DO THIS WILL PREVENT YOU FROM UPLOADING AND SUBMITTING A TENDER RESPONSE'. Below this, question '1.01' asks the user to attach their completed Pricing Return, marked with a red asterisk. A file upload area is provided with an 'Attach file...' button and a note 'Or drag and drop a file here'.

Suppliers will not be able to return a tender submission unless the Mandatory questions on this screen have been completed.

To return a response you need to do this this via the 'Attachments' button.



The screenshot shows the 'Attachments' tab selected in a navigation bar. The page title is 'Your Response | SRES1000003'. At the top, there are buttons for 'Decline', 'Messages', 'Validate', 'Save', and 'Submit'. Below these, a message states: 'From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.' The main content area has a 'Request Documents (22)' section, followed by an 'About You' section with a text area for additional information. Below that is a 'Request Overview' section. The 'Request Overview' section displays the following information:

Request SREQ1000004	
Customer Name Staffordshire County Council	Allow multiple responses? No
Title ST261 - PROVISION OF THE COUNTY FARMS SOLAR PV	Allow response re-submit before deadline? Yes
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	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**”.

The screenshot shows the 'Your Response' page for SRES1002258. The 'Attachments' tab is active. In the 'Your Files' section, the 'Attachment Type' is 'General Document'. A file named 'ITT Part 2 Compulsory Questionnaire.docx' is listed. The 'Upload Files' button is highlighted with a red box and an arrow pointing to it from the text above. Below this, the 'Uploaded Files' section is empty, showing a table with columns for Name, Type, Download, and Remove. The status 'No Items to display' is shown at the bottom of the table.

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.

All uploaded files will then be listed below the “Uploaded Files” section. A file will have only been successful if it highlights green and populates under this section.

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

Suppliers will have to try variations in re-uploading this – files size, file type, length of file name etc. as there is a problem with the document. Normally the error occurs due to the file name being too long.

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.

If the tender does not contain a Question screen, please be aware that the submit button can be selected without any documents being uploaded. Please bear in mind that the system will automatically show the above green message and will also generate the below email even if no documents have been attached. 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>]
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

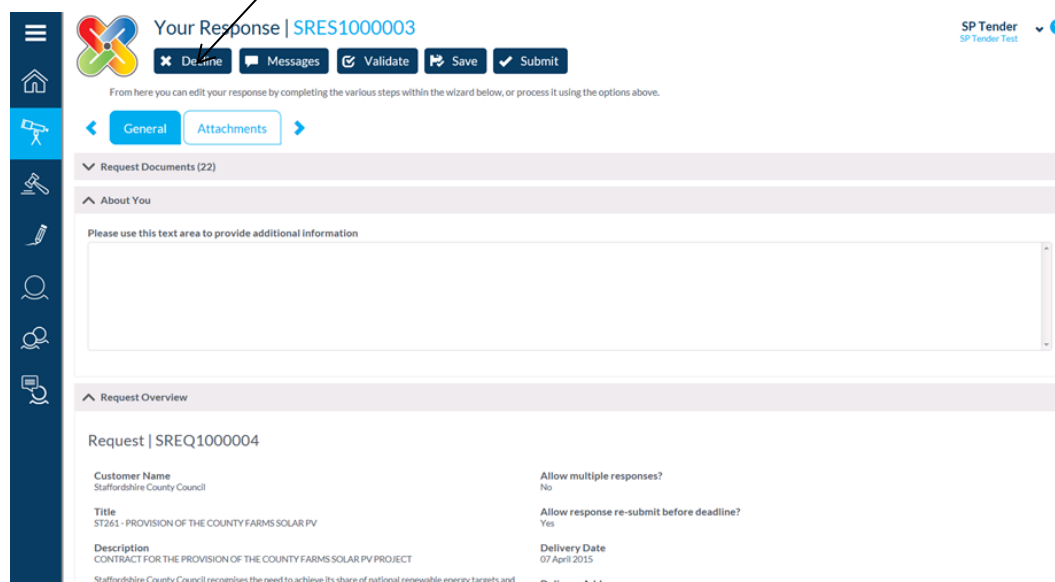
Please retain this email as evidence of submission as without it the Council or Proactis cannot progress any investigation into any perceived irregularity in submissions. Please check all inboxes including spam folders for this email each time you 'submit'.

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. Declining an opportunity

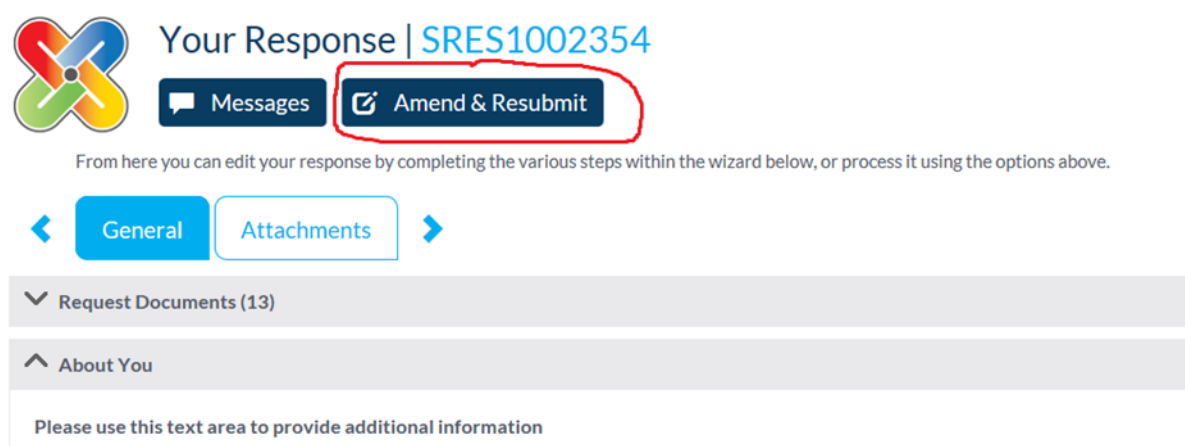
To do this supplier's should navigate back to the opportunity. To decline the opportunity you need to do this via the 'Decline' button.



By declining an opportunity this makes your organisations status as “inactive” meaning you will no longer receive dialogue alerts in your registered email address for this opportunity. However, any messages that the County Council sends via the messages function will still be viewable by your organisation by navigating back to the opportunity and re-registering your interest.

7. 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:



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.

8. 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

9. 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: -

PC583

Search Filters

Closing Date From

Announcement Type

Response Status

Registered Interest?

☒ Include Expired?

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

PC583

Search Filters

Closing Date From

Announcement Type

Response Status

Registered Interest?

☒ Include Expired?

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: -

Messages Amend & Resubmit

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) xxxxxxxxxxxx RETURN TO BUYER (040316) version 2	General Document	

10. Viewing Messages Post Tender Deadline

Where applicable, Suppliers may receive dialogue messages from the buyer after the tender deadline. These messages can be viewed 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: -



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

PC583

Search Filters

Closing Date From

Announcement Type

Response Status

Registered Interest?

☒ Include Expired?

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



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

PC583

Search Filters

Closing Date From

Announcement Type

Response Status

Registered Interest?

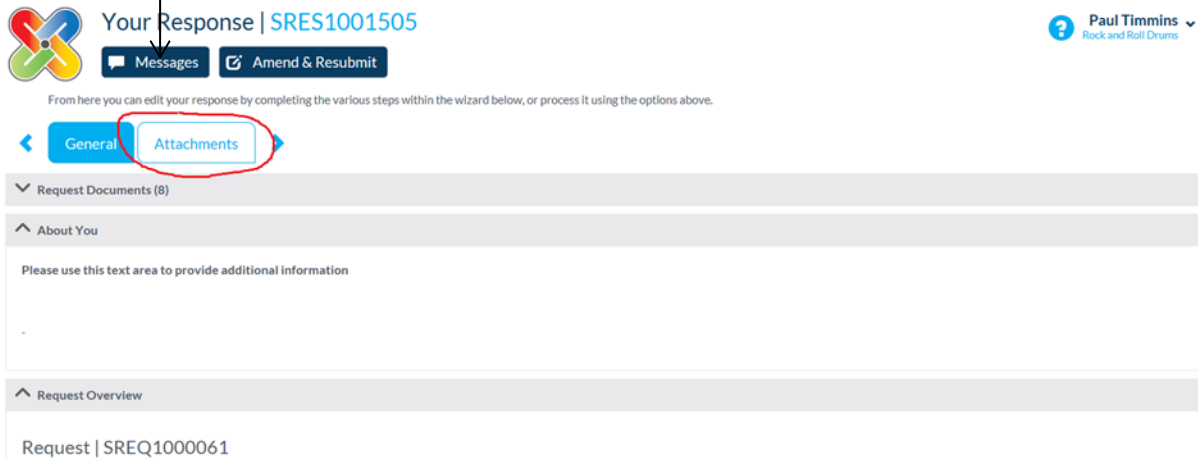
☒ Include Expired?

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	

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 '**Messages**'. This will display the messages that the buyer/supplier will have sent and received during the tender process: -



Your Response | SRES1001505

Messages Amend & Resubmit

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

Paul Timmins
Rock and Roll Drums

11. Changing your organisation details

There may be occasions when you need to amend the details of your organisation. To do this follow these simple steps...

- Log in to the Proactis supplier portal
- From the top right hand screen under your organisation name, select the arrow to expand the drop down list, Select "Your Business"
- Navigate through the options to review and amend your details
- Once all amendments have been made select "Save"