Improving procurement visibility and control

Guide to Using the Supplier Portal

Updated February 2023

# Contents

About the Supplier Portal

The Supplier Portal you are using is provided solely for the purposes of the buying organisation specified on the Registration page and your registration details will not be shared with any other organisation.

The portal is provided by a UK registered company called Atamis Ltd. Atamis is an approved partner of Salesforce.com which provides the cloud-based platform on which the Atamis system runs. The system and data are hosted in the UK and are protected with ISO27001 information security. All data is encrypted in transit with TLS 1.1/1.2.

The following pages are normally made available within the Supplier Portal:
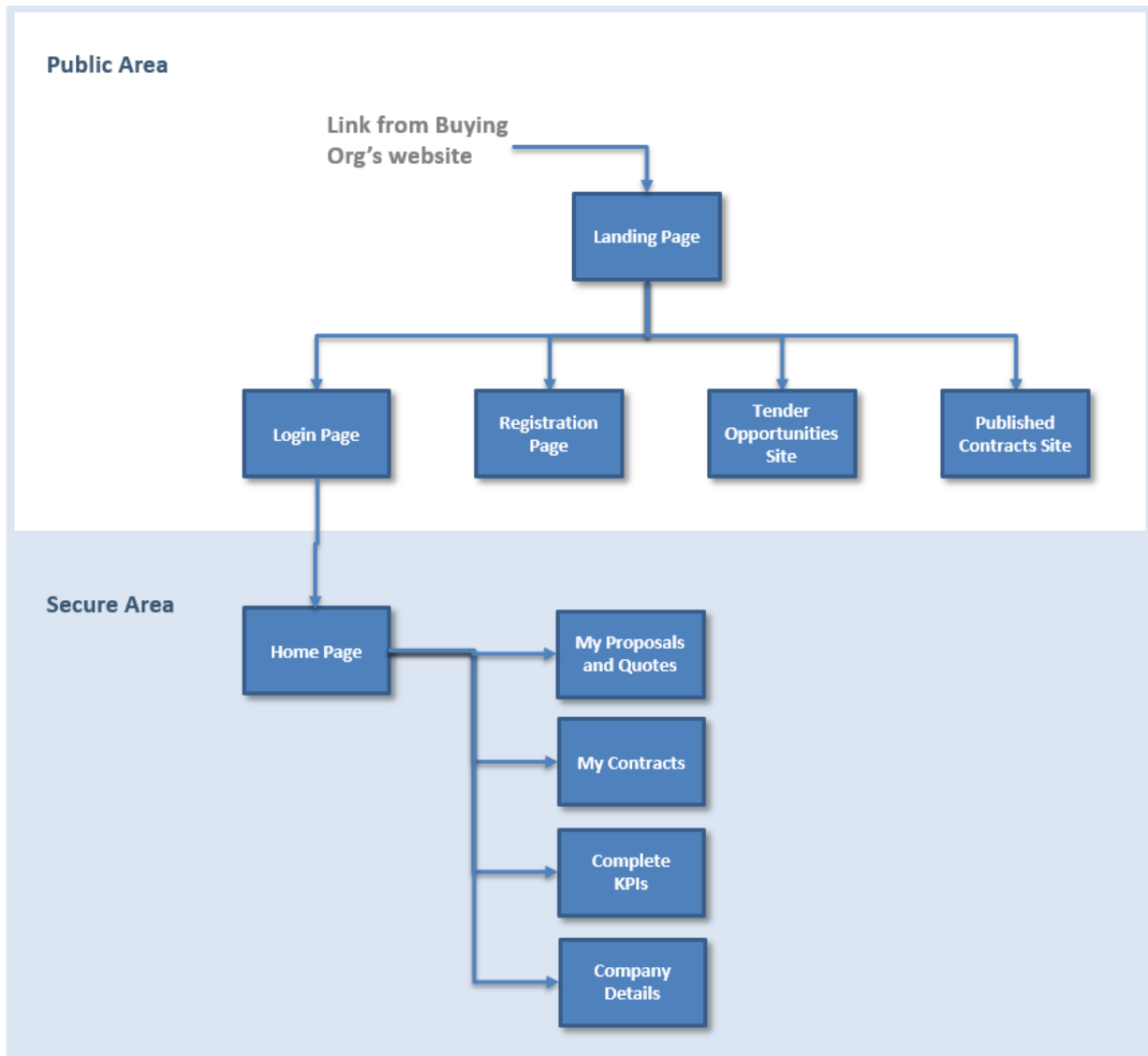
Registering and logging in

Register

If you have not accessed the portal before you will need to click **Register** from the landing page and complete the required form.

Log in

Alternatively, if you have used the portal before, click **Log in** from the landing page and enter your username and password.

Forgotten Password

From the Log in page, click **Forgot your Password?** and enter your email address in the Username box. Click **Continue** and you will be emailed instructions on resetting your password. Note the email will be addressed from Salesforce.com. The email goes out immediately so please check spam and junk folders if it does not reach your inbox.
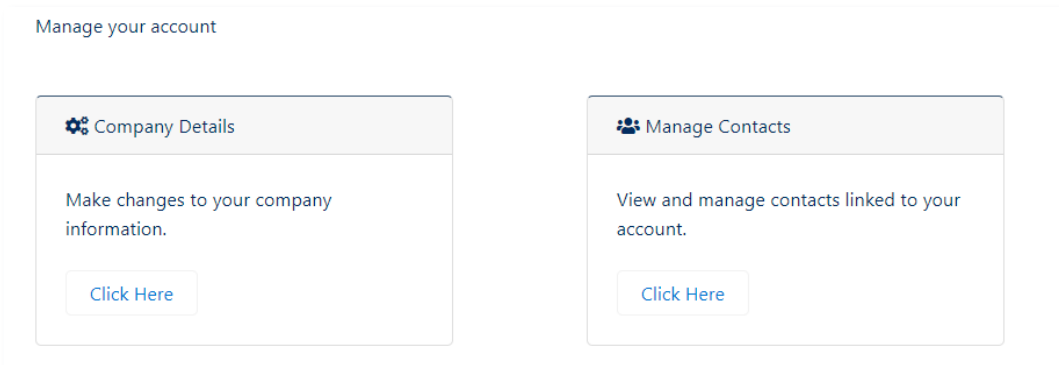
Forgotten Username

Your Username will be the email address you used when registering.

Managing Contacts Under your Supplier Account

When your company is registered in the Atamis Supplier Portal, a Supplier Account is created for your company. A Supplier Account can have multiple contacts. Once a contact is associated with a Supplier Account, that contact will get access to all the relevant information under that Supplier Account such as Procurements, Contracts or Contract KPIs. You can view and manage the contacts for your organisation via "Manage Contacts" Menu displayed on the Home page after you login.

It is the responsibility of the supplier to maintain user access to their supplier contacts. Suppliers should review access on a routine basis and deactivate contacts that no longer represent their organisation.

Manage your account

⚙ Company Details	👥 Manage Contacts
Make changes to your company information.	View and manage contacts linked to your account.
Click Here	Click Here

 Click "Manage Contacts" to review and manage the contacts for your organisation.

The page will display two sections:

- Manage Contacts: displays a list of registered contacts on the Atamis Supplier Portal

- Projects: displays a list of projects that your organisation is currently engaging with of they have engaged in the past.

"Manage Contacts" allows the management of users currently registered on the Atamis Supplier Portal. Contacts can be deactivated by unchecking the "Active?" box and click on **Save Changes**. Deactivated

users will no longer have access to the Supplier Portal. Access can be reinstated by checking the "Active?" box and pressing **Save Changes**.

Manage contacts

Contacts information

Contact name	Active?	
Maximus Decimus Meridius	☑	**Save changes**
John Smith	☑	

"Projects" allows the management of primary contacts per project.

Projects

Project name	Project details	Primary contact	
Printing Services	**Go to details**	Ana Rolling ⌄	**Save changes**
Hardware Maintenance	**Go to details**	Ana Rolling ⌄	

Project Primary Contacts can be changed by choosing a new contact from the list provided and pressing **Save Changes**.

Projects

Project name	Project details	Primary contact	
Printing Services	**Go to details**	Ana Rolling ⌄	**Save changes**
Hardware Maintenance	**Go to details**	John Smith / Procurement AJ Systems / Donna Andrew	

# Finding tendering opportunities and getting alerts

Search for Opportunities

You do not have to log in to search for tender opportunities providing the buying organisation has made this option available. If there is no link available to view tender opportunities from the landing page, you will need to log in.

After you have logged in, from the `Home Page` you should see a link similar to these options:

Q Find Opportunities

Search for opportunities to tender.

Click Here

🔍 Find Opportunities
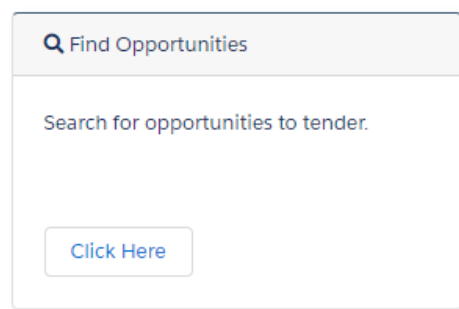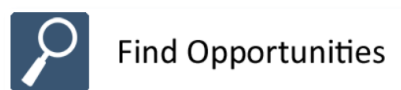
To search for tendering opportunities that have been published by the buying organisation, click **Find Opportunities**. (If you don't see this link it will be because the buying organisation is not publicising its tender opportunities through this portal.)
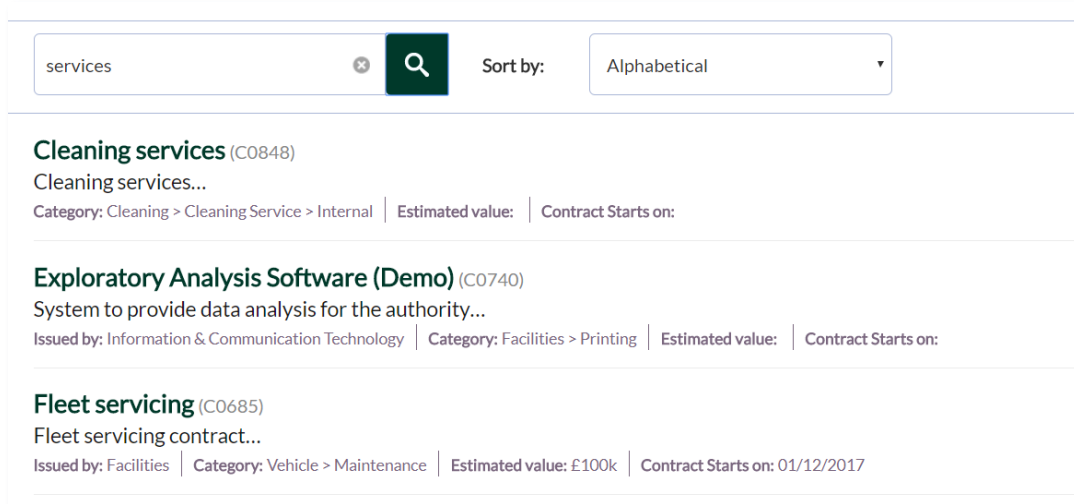
Enter one or more search keywords and click **Search**. The Search looks in all fields and operates like a web search engine, so if you enter two words it will return records that contains either word. Click on the title of an opportunity to view further details.

A maximum of 10 results are displayed on the page. Click **Next** at the bottom of the page to view the next 10 results.

Download Opportunities

From the bottom of the `Find Opportunities` page, Click **Download CSV** to generate a file containing all the data displayed in the search results.

Expressing interest in opportunities

Expressing interest is a means of notifying the buying organisation of your interest in potentially responding to an opportunity and of obtaining further information, such as documentation packs, about the opportunity.

Note: If the buying organisation has invited you to tender, you do not need to complete this step – the details of the opportunity should already be visible to you via the My Proposals and Quotes link.

From the `Find Opportunities` page, click on the title of an opportunity. If the tendering project is at the stage where it is open for suppliers to express interest, you will be able to click **Register Interest**.
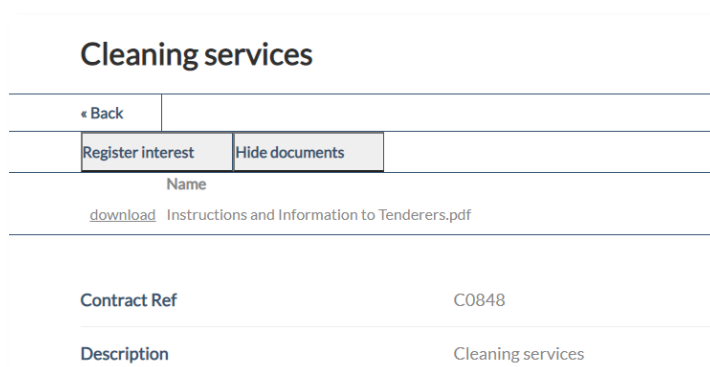
The `Register Interest` button will not appear if the window for registration has not yet opened or if it has closed. It will also not appear if the procedure the buying organisation is using does not permit supplier self-registration.

If you are not already logged in, the system will prompt you to log in or register, after which your interest will be registered and you will be able to view the details of the opportunity under `My Proposals and Quotes`.

If the buying organisation has shared any supporting documentation related to the tender, these can be accessed by toggling the `View Documents`/`Hide Documents` button.

View your proposal and quotes

If you have either been invited to respond or have registered interest in an opportunity, click **My Proposals and Quotes** on the `Home Page` (You will need to have logged in to access the Home Page.)

My Proposals and Quotes

The `My Proposals and Quotes` page lists all of your Open and Closed opportunities, their current status and time remaining until the response deadline.

My Proposals and Quotes

Show:
All ▾

Ref/Title	Issued by	Status	Closing Date	Time Remaining
C0706 - Stockworth Site renovation	Facilities	Open	13/12/2017 12:00	> 1 month
C0709 - Scaffolding	Facilities	Response deadline not enforced	06/07/2017 12:00	Closed
C0736 - Abraaj Test Project		Closed	27/10/2017 12:00	Closed
C0740 - Exploratory Analysis Software (Demo)	Information & Communication Technology	Closed	25/09/2017 12:00	Closed
C0754 - Bread and bakery products	Economy Services	Response deadline not enforced	31/10/2017 14:00	< 1 hour
C0767 - Reprographics		Response deadline not enforced	02/11/2017 12:00	< 2 days

Opportunity Page

The Opportunity page is presented as per image below and it contains the following components:

1   If you stay on this page for more than 30 seconds, this red link appears on the page to alert you to recheck the current system date/time.

> **Note**: You will not be able to change your response after the Closing Date/Time. The system's Current Date/Time is displayed for reference but does not automatically update if you wait on this page. To obtain the correct system time, click the **Refresh** link (appears after 30 seconds of waiting).

If you have registered interest to the current opportunity, the `Accept` button will be automatically selected. If you have been invited to bid to an opportunity, you will need to Accept the invitation before completing and submitting your responses.

2   **Click** `Documentation` to view and download all documents provided by the buying organisation relating to this opportunity. The documents may be structured in folders and will be displayed as shown below:

a) Home

My Proposals and Quotes » C1439 - Health Services » Documents

Documents

Folder: Supporting Documentation

Document Name	File Size	Uploaded Date	Downloaded	Action
Lorem Ipsum.docx	14320 Bytes	11/11/2020 16:46	(by Sian Davies on 11 Nov 2020)	Download

Folder: Second Stage Supporting Documentation

Document Name	File Size	Uploaded Date	Downloaded	Action
Lorem Ipsum.docx	14320 Bytes	11/11/2020 16:46	New	Download
Atamis-TM.pdf	2340327 Bytes	11/11/2020 16:46	New	Download

a) Shared documents will be displayed per folder and you are able to expand or collapse the list of documents by clicking on the arrow displayed next to the folder name

b) New documents that have not been downloaded by yourselves yet, will be marked as `New`

c) **Click** `Download` to download the document. Once downloaded, the system will mark the date/time and the name of the user that has downloaded the file

3 The communication between the organisation and yourselves must take place via messenger function. You can access all communications on `Messages` page. See Message Centre for more details.

4 Each `Requirement Section` will contain several requirements. All `Requirement Sections` will be visible here and you will have to open each one of them to access the requirements. Go to Responding to an opportunity for more details.

5 Every section will contain a number of required requirements and, as you enter your responses, the column will reflect the number of remaining required requirements due to complete.

6 The completion status for each `Requirement Section` is calculated by the system from all the Required responses in the requirement section. If you have entered a Response but not marked it as `Complete`, the system treats that Response as 50% complete; if you check the `Complete` box, it treats is as 100% complete.

> **Note**: The Completion Status bars are determined by how many responses you have entered and whether you have marked them as complete. If you had entered all mandatory responses but had not marked any as complete, the bar would show as 50%. The 'Complete?' checkbox provides you with the option to draft responses first and then confirm/approve later.
>
> **You do not need to have marked each Response as complete in order to submit your final response.**

7 When you **click** Submit the system will check you have completed all the Required (including Pass/Fail) Requirements, then mark all Responses as Complete and display a submission confirmation message. Upon confirmation of submission, a submission notification will be sent to the email address registered and a copy of it is available in the Message Centre as well. Go to Submitting a response section for more details.

8 When you confirm the submission, the status of each Requirement Section will update accordingly. As the project progresses into other project stages, the submission status for each Requirement Section and Project Stage will update accordingly.

9 If you need to decline the invitation, you can do so by clicking on **Decline**. You will be given the option to write a message for the buying organisation.

Decline Interest In Opportunity

If you do not intend to continue participating in this procurement exercise, please provide a reason for declining below and click Confirm to inform the buying organisation of your decision.

> Hello,
>
> Thank you for the invitation to participate in this opportunity. Due to prior commitments we are unable to take part on this occasion.

Confirm | Cancel

Responding to an opportunity

In order to review and respond to the requirements **Click** on one of the Requirements Sections.

The system will present you with a page containing the following components:

1 The Completion Status bars are determined by how many responses you have entered and whether you have marked them as complete. If you had entered all mandatory responses, but had not marked any as complete, the bar would show as 50%. The 'Complete?' checkbox provides you with the option to draft responses first and then confirm/approve later.

You do not need to have marked each Response as complete in order to submit your final response.

2   For each Requirement Section, you can use the `Work Offline` function. The system will provide a spreadsheet in which you will be able to enter your responses and upload them on to the portal. Instructions are provided on the `Work Offline` page as well as in cell `A1` in the downloaded spreadsheet.

3   **Click** `Back to Summary` to return to the Opportunity Page.

4   When the `Requirement Section` page is accessed, the default view of the requirement is set to `Expanded View`. The `Expanded View` presents the full body of the requirement and allows you to enter your responses while on the page.

If you **click** on `Compact View` the system will trim the body of the requirements as per below. In order to enter your response from `Compact View` you will need to **click** on every `Requirement`.

5 The `Expanded View` presents the full body of the requirement and allows you to enter your responses while on the page.

a) For some type of responses, the system will allow you to edit while on the page, such as selecting one of the picklists

b) For other type of responses, you will need to click on the link in order to enter your response

c) **Click** on the `checkbox` to mark a response as completed

d) **Click** on `Save Responses` to save your entries while working on this page

6 The requirements will be displayed in a list regardless what view you have chosen

7 `Response Summary` column will display your entered and saved responses. Please note that some responses will require you to **click** on the `Response Summary` link in order to enter your response. This action will direct you to a page where you can enter your responses.

Each Response page will have a different appearance depending on the `Response Field Type`. Two examples are shown below for `Attachment`…
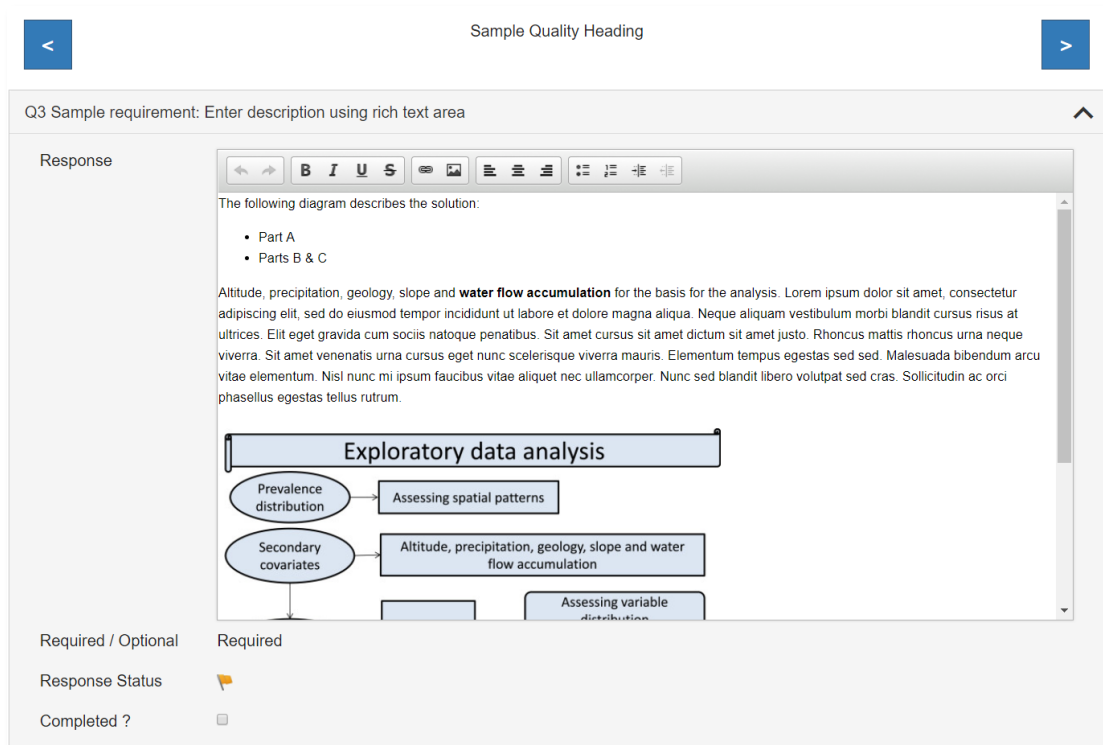
and `Rich Text Area:`

Click **Left** [<] or **Right** [>] to move through the section. Your entries will be saved automatically when you move from one response to another. Alternatively, click **Save** before moving off the page. Click **Back** to return to the opportunity page or use the breadcrumb trail at the top of the page.

8 The buying organisation will request you to provide answers to required or optional requirements. This column will specify if the requirement is `Required` or `Optional.`

You must provide answers for all required requirements in order to submit your responses. When you **click** on `Submit`, the system will display a window with incomplete requirements if some required requirements have been missed.

9 The flags displayed denote the `Status` of the response

- 🚩 Response entered and the `Completed?` Checkbox checked. You may submit your responses

- 🚩 Response entered, but `Completed?` Checkbox not checked. You may submit your responses

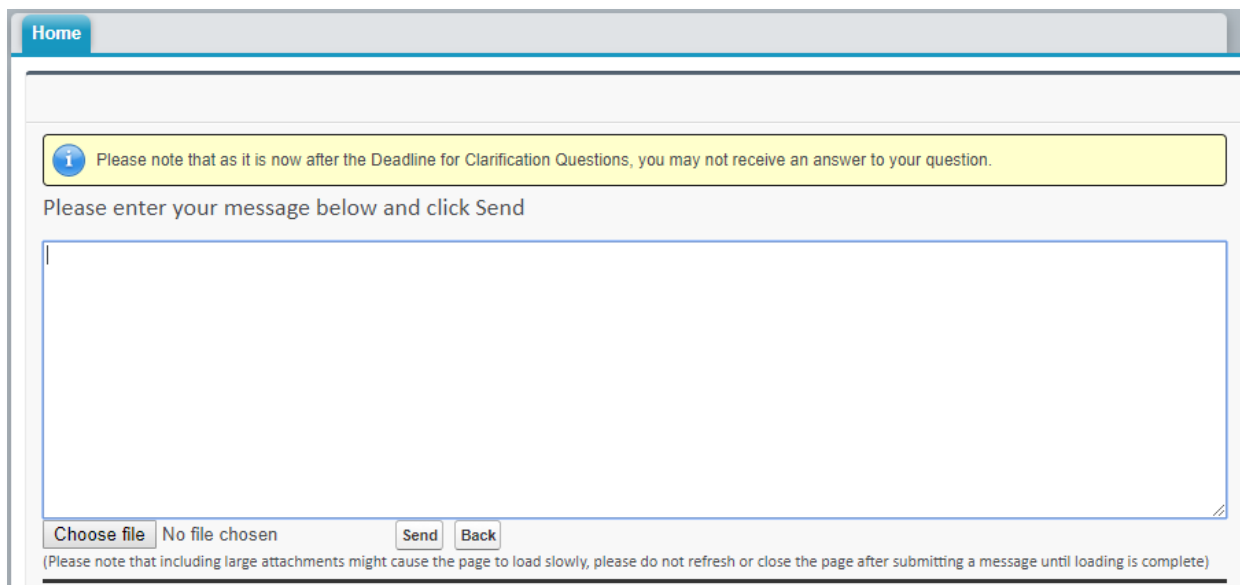- 🚩 Response not entered. You must enter a response in order to submit.

Message Centre

To raise a clarification question with the buying organisation or to view any other communication with the organisation, either:

- locate the opportunity using `My Proposals and Quotes`, open the tender, then **click** `Messages`. This displays questions that you have previously asked (and answers when available) for the tender you've opened.
- on `Home Page`, **click** on `Message Centre`. This will display a list of all messages for all tenders.

Note: When you ask a question, it may take a few minutes before it appears in your messages list.

If you attempt to send a message after the `Clarification Question Deadline` has passed, you will see the message below indicating that a reply may not be provided:

Your question will still reach the buying organisation, however a response may not be provided.

Note: You'll receive an email immediately an answer is provided for your question, or indeed for any published answer, so you don't need to keep checking in the portal.

Submitting a response (Accept, Submit or Decline)

Accept

If the buying organisation has invited you to this opportunity, you will be requested to `Accept` the invitation before you can enter and submit your responses. The `Submit` button will not be visible until you have accepted the invitation.

When you click on `Accept`, the following message will be displayed which will request your confirmation before proceeding.

Submit

To submit your final response, locate the opportunity using My Proposals and Quotes, then click **Submit**.

Note: You will not be able to submit a final response if there are mandatory requirements that you have not entered. However, you don't need to have checked the Completed box on every response in order to submit, the system will mark them as Completed for you.

This will generate an email to the buying organisation indicating that you have responded. Depending on the procedure being followed, the buying organisation may not be able to view your response until some time after the Closing Date/Time for the opportunity.

Note: You will not be able to submit your final response after the Closing Date/Time, however all of the responses you entered before the deadline will still become visible to the buying organisation and may be considered for evaluation. This is dependent on the type of procurement procedure the buying organisation is adhering to.

In exceptional circumstances a buying organisation may grant a supplier a late submission. This must be agreed directly between the supplier and buying organisation.

The Status of each section will update as per below:

- `Not yet Submitted` – you are still within the Response Window of the opportunity and you are still able to submit your responses
- `Submitted` – you are still within the Response Window of the opportunity and you have successfully submitted your responses
- `Did not Submit` – the Response Window for this opportunity is now closed. This status denotes that you have not submitted your responses

- `Evaluation Started` – the Response Window for this opportunity is now closed, you have successfully submitted your responses and the buying organisation has started the evaluation of your responses.

If you would like to amend your submitted responses, you are able to do so if the Response Window for the opportunity is still open. To amend your already submitted responses, simply navigate to the relevant requirement and amend your response. If you attempt to edit a response that has already been submitted, the system will display a warning window with the following message:

You have made a change to an already submitted response. Would you like to save your changes and override your latest submitted response?

If you **click** `Yes`, the modifications you have applied to your response will be saved and re-submitted. If you **click** `No`, the modifications you have applied will not be saved and re-submitted.

Decline

If you do not intend to respond to the opportunity, click **Decline** and provide a reason. This will be communicated to the buying organisation. The decision can be reversed if required by **clicking** on the `Accept` button again.

Decline Interest In Opportunity

If you do not intend to continue participating in this procurement exercise, please provide a reason for declining below and click Confirm to inform the buying organisation of your decision.

Hello,

Thank you for the invitation to participate in this opportunity. Due to prior commitments we are unable to take part on this occasion.

Confirm   Cancel