

Step-by-Step Supplier Guide to the e-Tendering System

This guide should be read before you register/modify your account as it takes you through important points to achieve a successful registration and maintaining current company information.

System help is also available through the system, other links can be accessed through the footer of this document.

Contents

1. Important – Before You Register
2. Document Criteria
The criteria you should meet before being awarded a tender.
3. Do and Don't
Simple what to do and what not do on the system.
4. Contacts
Adding new representatives to your Account. It is recommended that you add more than one person to your account to ensure no opportunity is missed.
5. Business Types
How to update the categories of your provision.
6. Uploading Documents
How to upload “NEW” & replace “EXPIRED” Documents.
7. Tender/Quote Documents
How to download, save tender documents and upload them before the tender return time.
8. Correspondence
Sending emails, messages and record telephone communications.
9. Action reminders
How to stop Actions (Automatic reminders from the system) when you have completed the required task.
10. Guide Updates
This section explains how to stop Actions (Automatic reminders from the system) when you have completed the required task.

Important - Before You Register (1)

An important criterion for registration is the commitment to complete required information, documentation and update as and when they occur.

Registration

- 1.1** Suppliers and contractors are required to register on the system once only. Selected authorised university representatives will be able to access information. Thereby increasing your eligibility to be considered for different contract opportunities.
- 1.2** Registration should be made separately for each company that is part of a group but classed as separate legal entities as we require specific company documentation.
- 1.3** It is important that the supplier representative use a general corporate e-mail address where available as the **Publish Email** as alerts will be issued. This email will not be able to login the system unless registered as a contact.
- 1.4** If you encounter difficulties with any aspect of the system, wish to convey any comments contact us via Messages facility accessible through the system.

Document Criteria (2)

- 2.1** An important criterion for requesting to be admitted on the University's preferred list system is the commitment to complete the appropriate documentation, and the willingness to supply the supporting information to access your application. These include:
- a) Company Details.** Full company details including corporate status, staffing levels, qualifications, governance, compliance, experience, memberships to specialist bodies, etc. e.g. NICEIC, CORGI etc.
 - b) Assessment of credit worthiness and/or Annual Audited Accounts.** Three years accounts for sole traders and credit worthiness for contract values.
 - c) Credit Checks.** Your contract limit and details of financial stability will be assessed.
 - d) Client References.** Requested when invited to tender a minimum of three to assess their satisfaction.
 - e) Insurance Policies.** Employers/Public/Professional Liability, Contractors All Risk etc.
 - f) Quality Systems and Assurances (ISO Certificates).** Robustness of systems and arrangements, certification and accreditation.
 - g) Health & Safety Policies.** Conformity with UK and EU Regulations and Directives.
 - h) Equal Opportunities Policies.** Conformity with UK and EU Regulations and Directives on Diversity.
 - i) Environmental Policies.** Conformity with UK and EU Regulations and Directives on Sustainability.
- 2.2** Suppliers who are **Constructionline** accredited are required to complete basic registration details providing their Constructionline reference associated with the company name/registration number and ensure their details are provided to Constructionline for assessment.
- 2.3** You must also access and comply with applicable [university policies](#) such as [contractors code of practice](#) and conditions of contract.
- 2.4** If you do not wish to supply the essential information you should not request to be included on our system.
- 2.5** The onus is on suppliers to upload and update supporting documents to the **Company Details, Documents** section as and when changes occur or requested by the University in order to maintain their eligibility to do business with the University.
- 2.6** We will assess your application fairly and responsibly and all information submitted is treated in strict confidence unless permission is granted to share your information within the HE sector.

Do and Don't (3)

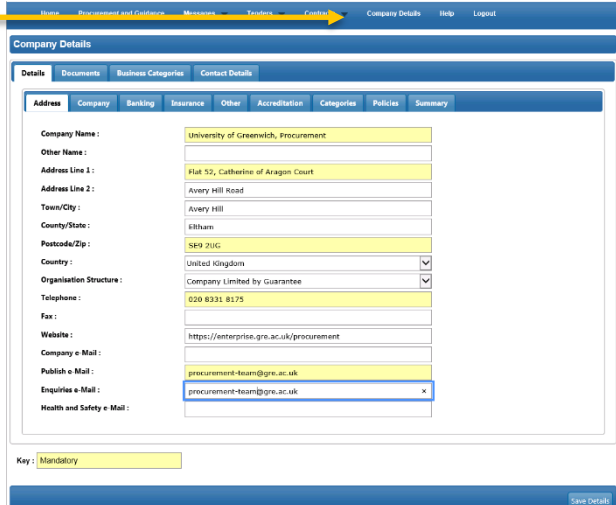
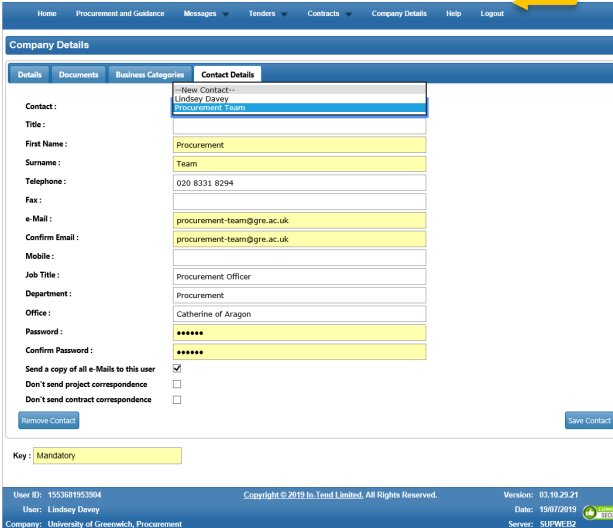
- 3.1** Do upload attachments preferably in widely used software formats (e.g. .pdf, .doc, .xls, etc.)
- 3.2** Do upload company documents in advance of your tender submission
- 3.3** **DO NOT** merge attachments together in one file as expiry dates are likely to differ.
- 3.4** **DO NOT** change the layout of any forms; any additional supporting information can be uploaded and submitted as separate files.
- 3.5** **DO NOT** overwrite documents which are still applicable. Documents that are no longer applicable can be archived.
- 3.6** **DO NOT** Upload Tender Documents to the “Company Document” section as these may not be checked at the time of tender opening and your proposal may be overlooked.

Managing Contact Details (4)

This procedure is used to add new, edit or remove contacts. Users can be included for different requirements (e.g. Administration for updating expired documents, Tender/Bid management team, Sales for use if a contract is in place), Edit details if any changes are made to telephone numbers, emails etc. or remove details if a person leaves the company or you no longer want them to access to the system.

If Contacts are at different locations do not register the company more than once unless they are under a separate company registration number, you can always add office details on the individual account.

- 4.1 Log onto your **e-Tendering** account
- 4.2 Select **Company Details**
- 4.3 Then **Contact Details**
- 4.4 This will then take you to the next screen which shows you a drop-down list of contacts.
- 4.5 Select the **New Contact** or an **Existing user** from the drop-down.

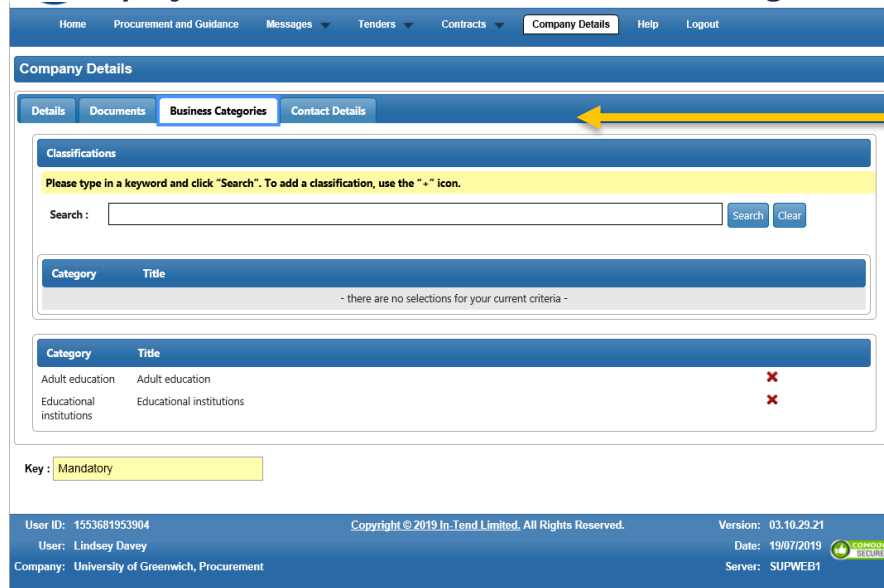
- 4.6 Update/complete or remove contacts details and **Save**.
- 4.7 An email notification will be sent containing registration User ID and Password or notice of addition or removal to accounts.

Updating Business Types (5)

This procedure is used to change the product or service so you never miss out on business the university may require.

Please DO NOT select commodities which your company isn't able to supply/carry out.

5.1 Select the **Company Details** button. And then the **Business Categories**.



Home Procurement and Guidance Messages Tenders Contracts **Company Details** Help Logout

Company Details

Details Documents **Business Categories** Contact Details

Classifications

Please type in a keyword and click "Search". To add a classification, use the "+" icon.

Search: Search Clear

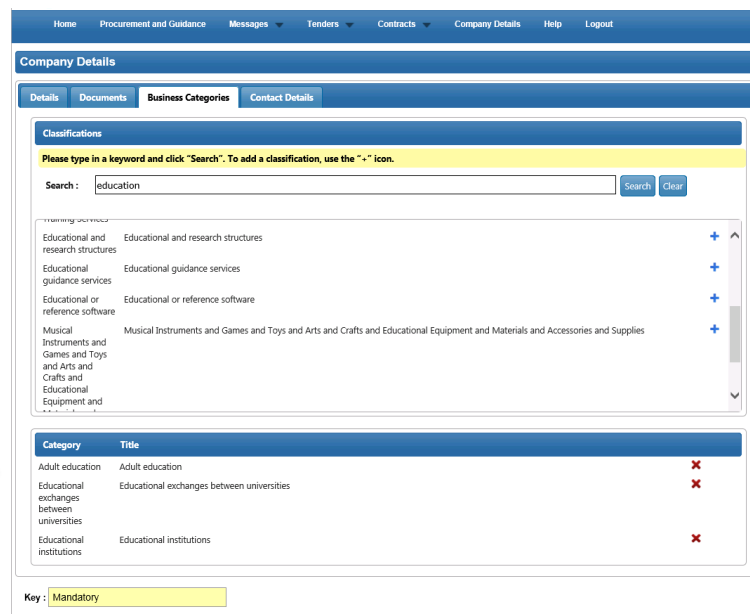
Category	Title
- there are no selections for your current criteria -	

Category	Title
Adult education	Adult education
Educational institutions	Educational institutions

Key: Mandatory

User ID: 1553681953904 Copyright © 2019 In_Tend Limited. All Rights Reserved. Version: 03.10.29.21
 User: Lindsey Davey Date: 19/07/2019
 Company: University of Greenwich, Procurement Server: SUPWEB1

5.2 Type in a keyword, Scroll through the list of **Business Categories** and select the required category, by either clicking or using the + button. Once you have selected your categories they will appear in the box below. Should you select one in error use the X icon to exclude.



Home Procurement and Guidance Messages Tenders Contracts Company Details Help Logout

Company Details

Details Documents **Business Categories** Contact Details

Classifications

Please type in a keyword and click "Search". To add a classification, use the "+" icon.

Search: education Search Clear

Educational and research structures	Educational and research structures	+
Educational guidance services	Educational guidance services	+
Educational or reference software	Educational or reference software	+
Musical Instruments and Games and Toys and Crafts and Educational Equipment and Materials and Accessories and Supplies	Musical Instruments and Games and Toys and Arts and Crafts and Educational Equipment and Materials and Accessories and Supplies	+

Category	Title
Adult education	Adult education
Educational exchanges between universities	Educational exchanges between universities
Educational institutions	Educational institutions

Key: Mandatory

5.3 Your selections will automatically be saved.

Uploading Documents (6)

To upload Tender Documents please see “How to download & Upload Tender Documents”
DO NOT upload them to this area of the e-Tendering system

This procedure is used to upload/update standard company documents (e.g. Accounts, Insurance and other certificates) and/or other mandatory.

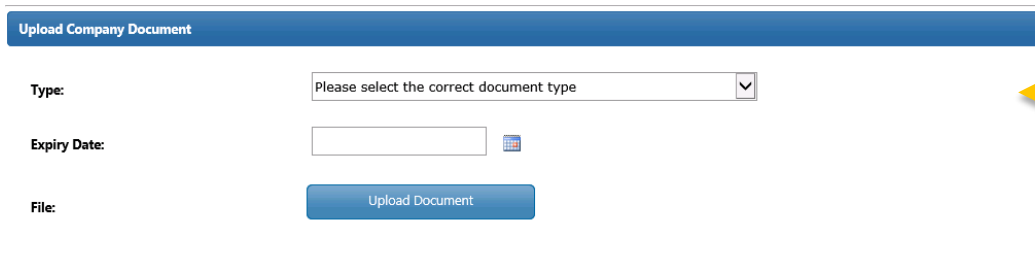
- If you do not add a revision over an expired document you will continue to receive automatic reminders to update the existing document.
- When you upload a revision you will only be able to see the latest document; the old documents are stored in the History.

6.1 Log onto your **e-Tendering** account.

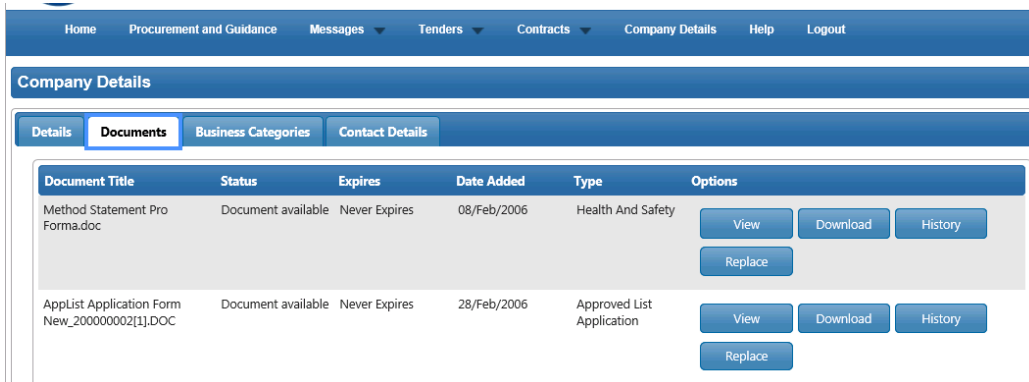
6.2 Select **Company Details**.

6.3 Select **Documents**.

6.4 Use the “**Type**” drop down list to describe your NEW document, if the documents is only valid until a certain date enter the “**Expiry Date**” or leave empty for documents which do not expire. Then “**Upload Document**” browse and select the file from your system.



6.5 Choose from the options shown for the document you wish to update and replace expired documents with your latest version.



Document Title	Status	Expires	Date Added	Type	Options
Method Statement Pro Forma.doc	Document available	Never Expires	08/Feb/2006	Health And Safety	View, Download, History, Replace
AppList Application Form New_200000002[1].DOC	Document available	Never Expires	28/Feb/2006	Approved List Application	View, Download, History, Replace

6.6 Select the “**Type**” of your new document using the drop-down list.

6.7 “**Expiry Date**” must be entered if applicable, if not then leave this blank.

6.8 Upload your documents by clicking on “**browse**” Select your file and press “**upload**” your documents should then appear on the screen.

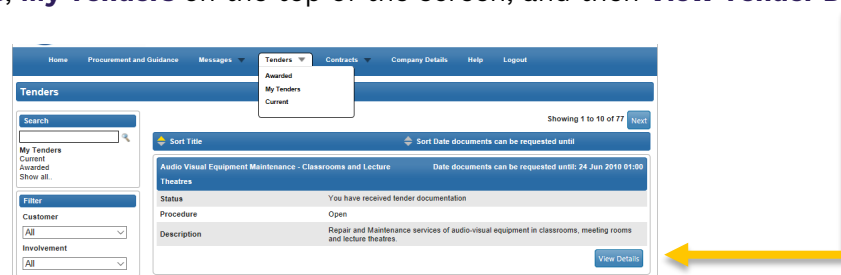
Tender Documents (7)

This procedure is used to put Submit Tender/Quote/Mini-Competition documents through the e-Tendering System. Generic company documents (Insurance, Policies, Accounts) should be submitted to the Company Details section of the system.

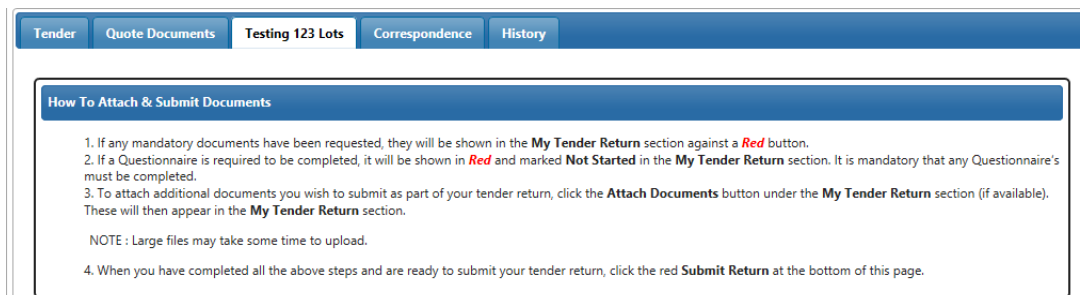
You may need to scan your documents first, remember to rename your documents to clearly identify what they are e.g. Form of Tender, Pricing Schedules. Electronic format, preferably in PDF format.

Your username and password acts as your signature, accounts using a general login (e.g. info@company.co.uk) should specify the person responsible for the project. If you do not have an “Electronic/Scanned Signature” we will accept typed signatures on your Tender documents.

- 7.1 Select **Tenders, My Tenders** on the top of the screen, and then **View Tender Details**.



- 7.2 Select the “Stage” of the project which has been reached, the first section will give you basic instructions. “How to Attach & Submit Documents”



- 7.3 The Second displays time remaining for your bid submission.



- 7.4 The “Tender Details” and stage information are then displayed.

Tender Details	
Stage Name	Testing 123 Lots
Description	To review updates of supplier portal
Closing Date	12 September 2019
Stage Start Date	12 September 2019
Project Title	Testing 123
Project Description	testing

7.5 The Project documents for you to download and complete ready for uploading before the return time. It is advised that you give yourself sufficient time before until you are used to the process. If the project contains Lots these will be separated as displayed.

Tender Documents Received - Lot 1 - Download	Description	Options
	02 Letter of Intent.docx	<input type="button" value="View"/> <input type="button" value="Download"/>
	Catalogue.xls	<input type="button" value="View"/> <input type="button" value="Download"/>
Tender Documents Received - Lot 2 - Complete	Description	Options
	H and S Policy January 2013.pdf	<input type="button" value="View"/> <input type="button" value="Download"/>
	01 Agreement Letter.docx	<input type="button" value="View"/> <input type="button" value="Download"/>
Tender Documents Received - Lot 3 - Submit	Description	Options
	Guide to Tendering-2-2016.pdf	<input type="button" value="View"/> <input type="button" value="Download"/>
	Order Amendment Memo.doc	<input type="button" value="View"/> <input type="button" value="Download"/>
Tender Documents Received - Lot 4 - Win	Description	Options
	10 Appdx C - UoG H&S-Policy-Sept-2015-statement-of-intent-signed.pdf	<input type="button" value="View"/> <input type="button" value="Download"/>
	03 Award Letter.docx	<input type="button" value="View"/> <input type="button" value="Download"/>

7.6 To submit your tender, you must “Opt In” and the next stage will appear. Should you decide to “Opt Out” please give reasons.

Confirmation of Your Involvement

Please ensure that you inform us of your decision to participate. To submit a response, you will be required to Opt In.

Opt In- This will confirm to us of your involvement and your intention to submit a return.
Opt Out- This will confirm to us that you are not submitting a return. You will be able to provide a reason as to your decision and have the option to cease any system-generated communication. You will be able to opt back in at any point.

7.7 Should you wish not to participate in a Lot Just select “No” as shown below, then they will be removed.

Lot	Status	Submitting
Lot 1 - Download	Submitting	<input type="button" value="Yes"/> <input type="button" value="No"/>
Lot 2 - Complete	Submitting	<input type="button" value="Yes"/> <input type="button" value="No"/>
Lot 3 - Submit	Submitting	<input type="button" value="Yes"/> <input type="button" value="No"/>
Lot 4 - Win	Submitting	<input type="button" value="Yes"/> <input type="button" value="No"/>

7.8 Mandatory documents sent for completion will show a placeholder, these documents MUST be returned with your submission. Or the system will deny your response.

My Tender Return - Lot 1 - Download	Description	Envelope	Options
Price Lists	Download your documents	Lot 1	<input type="button" value="Upload Document"/>
My Tender Return - Lot 2 - Complete	Description	Envelope	Options
Quotation Request	Complete your documents	Lot 2	<input type="button" value="Upload Document"/>
My Tender Return - Lot 3 - Submit	Description	Envelope	Options
Price Lists	Submit your documents	Lot 3	<input type="button" value="Upload Document"/>
My Tender Return - Lot 4 - Win	Description	Envelope	Options
Award/Decline Letter	Win your tender	Lot 4	<input type="button" value="Upload Document"/>

7.9 Additional supporting information can be included for each lot, just select your lot and envelope for return.

Select documents you wish to add to the **My Tender Return** section above using the **Attach Documents** button below.

NOTE : Large files can take some time to upload.

NOTE : Document Placeholders have been uploaded by the Procurement Department. Please upload a document for each mandatory placeholder before making a return.

Lot:

Envelope:

7.10 You are ready to submit your return, complete the overall value and any additional notes and Submit.

Submit My Return

Bidding Details:

Value:

Currency:

Notes:

When you have completed all the above steps and are ready to submit your tender return, click the **Submit Return** button.

Note: You can make one or more returns on this stage. Your last return will supersede any previous returns.

7.11 The system will then display a receipt displaying submission information. You are advised to Print to adobe and save.

Return Receipt

Here is the receipt of your Return Submission. Please Print a hard-copy for your records...

Tender : Testing 123
 Stage : Testing 123 Lots
 Submitted At : 12 Sep 2019 11:30
 Submitted By : Lindsey Davey
 Submitted By (e-Mail) : d28@gre.ac.uk

Bidding Details :

Value : 150,000.00
 Currency : Pound Sterling (GBP)
 Notes : Value Excluding VAT and subject to delivery requirements

Documents Returned - 9 item(s)...

01 Opening Summary and Recommendation Form_rev2012-01-05.xlsx (Price Lists) Lot 1 - Download	Lot 1
Data Processor Agreement -180515-University of Greenwich.docx (Attached Document) Lot 1 - Download	Lot 1
TRF 14 - (Project RefTitle) oft (Attached Document) Lot 1 - Download	Lot 1
01 Confirmation - Initial Registration doc (Quotation Request) Lot 2 - Complete	Lot 2
Invitation Letter doc (Attached Document) Lot 2 - Complete	Lot 2
02_Print Quotation_Summary_Pro-forma_Template_MPFM_AS_VMJ.xlsx (Price Lists) Lot 3 - Submit	Lot 3
Contents so far TBA.docx (Attached Document) Lot 3 - Submit	Lot 3
03 Articles Copy Enc Letter 19-10-98.docx (Attached Document) Lot 4 - Win	Lot 4
03 Award Letter.docx (Award/Decline Letter) Lot 4 - Win	Lot 4

Tips on Tenders (7.12)

- 7.12.1** To give you the best chance of selection ensure that generic company documents are uploaded to your **Documents** located **Company Details** area as stated in the e-Tendering approval criteria.
- 7.12.2** Ensure all tender specific documents are completed to the best of your ability and submitted via the project on the e-Tendering system.
- 7.12.3** Correspondence relating to projects to be Associated with the project to aid the contract administrators receipt of correspondence.
- 7.12.4** Queries raised with terms and conditions to be submitted as early as possible to avoid delays in awarding contracts.
- 7.12.5** You can view what stage of the Tender we are at by logging in and going to **My Tenders**.

e.g. Status of Tender:

- Your Expression of Interest in the tender has been received by us.
- You have received tender documentation.
- The tender is currently in progress.
- Unfortunately, on this occasion you have not been successful in winning this tender.
- Unfortunately, your tender award has been retracted.
- Congratulations, you have been successful in winning this tender.

Status of Latest Stage:

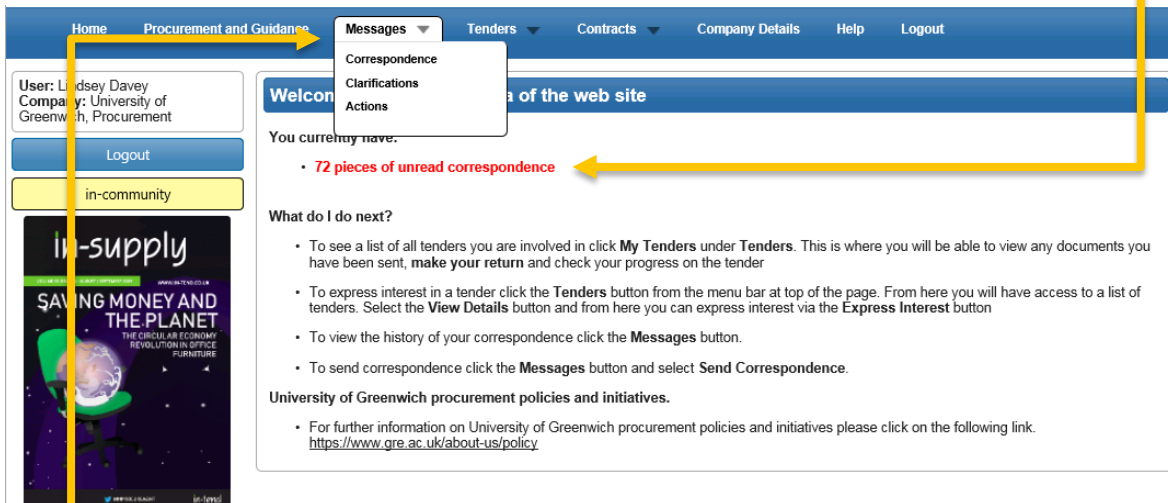
- Your return in pending
- Your return has been sent to us.
- Your return has been opened by us.
- Your return is being considered by us.
- Your return has been unsuccessful on this occasion.

Correspondence (8)

This procedure is used for us to communicate with you on all matters regarding projects, contracts and company documentation.

If you receive a message an email notification will be issued to your selected contacts, please do not reply to the address as it will go to the In-Tend host server and not to the university's system and will not include your contact information. Replies should be made via the system.

8.1 Log into your home page, here you will see a quick ink to unread correspondence.

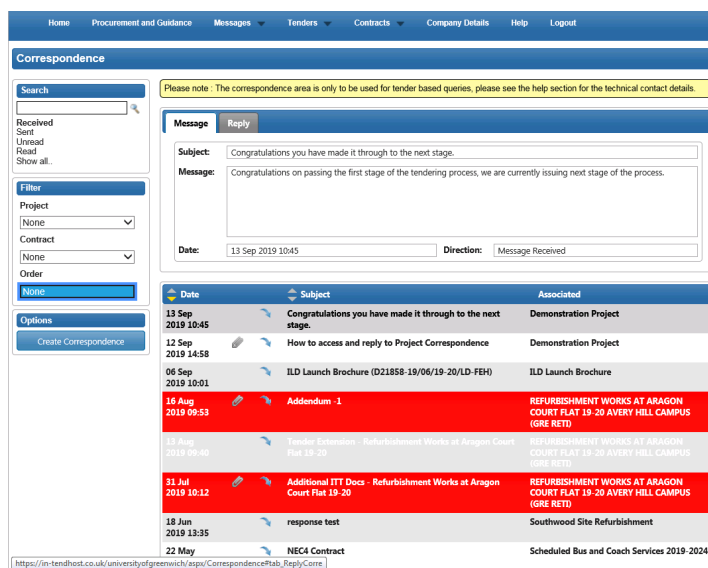


The screenshot shows the user interface with the following elements:

- Navigation bar: Home, Procurement and Guidance, Messages (dropdown), Tenders (dropdown), Contracts (dropdown), Company Details, Help, Logout.
- User profile: User: Lindsey Davey, Company: University of Greenwich, Procurement.
- Logout button.
- in-community banner.
- Advertisement for 'in-supply' with the headline 'SAVING MONEY AND THE PLANET'.
- Messages dropdown menu: Correspondence, Clarifications, Actions.
- Welcome message: 'You currently have...' followed by a red dot and '72 pieces of unread correspondence'.
- Section 'What do I do next?' with instructions:
 - To see a list of all tenders you are involved in click **My Tenders** under **Tenders**. This is where you will be able to view any documents you have been sent, **make your return** and check your progress on the tender
 - To express interest in a tender click the **Tenders** button from the menu bar at top of the page. From here you will have access to a list of tenders. Select the **View Details** button and from here you can express interest via the **Express Interest** button
 - To view the history of your correspondence click the **Messages** button.
 - To send correspondence click the **Messages** button and select **Send Correspondence**.
- Section 'University of Greenwich procurement policies and initiatives.'
 - For further information on University of Greenwich procurement policies and initiatives please click on the following link. <https://www.gre.ac.uk/about-us/policy>

8.2 To retrieve read messages which are not linked to Tenders/Quotations/Mini-Competitions, Highlight the Messages tab to view drop-down options.

8.3 This will display newest correspondence first, messages can be accessed via Received, Sent, Unread and Read or filtered by Project/Contract.

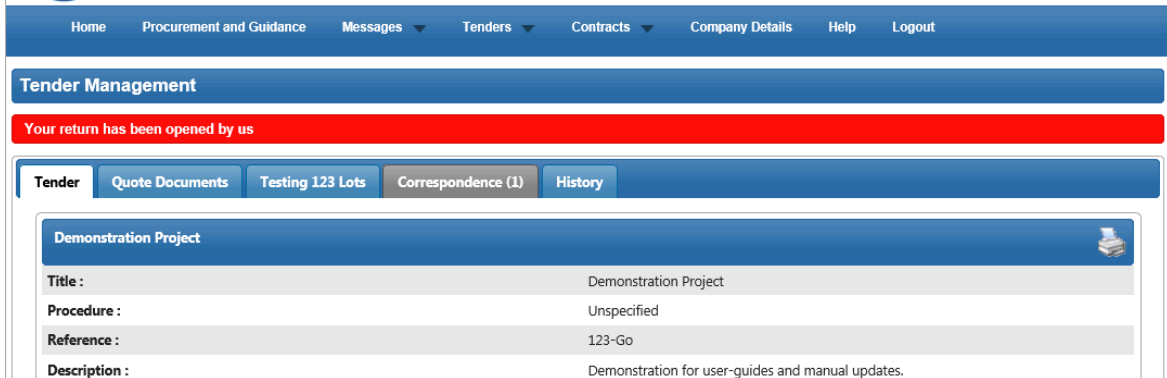


The screenshot shows the 'Correspondence' page with the following details:

- Navigation bar: Home, Procurement and Guidance, Messages (dropdown), Tenders (dropdown), Contracts (dropdown), Company Details, Help, Logout.
- Search bar.
- Filter options: Project (None), Contract (None), Order (None).
- Options: Create Correspondence.
- Message details:
 - Subject: Congratulations you have made it through to the next stage.
 - Message: Congratulations on passing the first stage of the tendering process, we are currently issuing next stage of the process.
 - Date: 13 Sep 2019 10:45
 - Direction: Message Received
- Table of correspondence:

Date	Subject	Associated
13 Sep 2019 10:45	Congratulations you have made it through to the next stage.	Demonstration Project
12 Sep 2019 14:58	How to access and reply to Project Correspondence	Demonstration Project
06 Sep 2019 10:01	ILD Launch Brochure (D21858-19/06/19-20/LD-FEH)	ILD Launch Brochure
19 Aug 2019 09:53	Addendum -1	REFURBISHMENT WORKS AT ARAGON COURT FLAT 19-20 AVERY HILL CAMPUS (GRE RETI)
19 Aug 2019 09:40	Tender Extension - Refurbishment Works at Aragon Court Flat 19-20	REFURBISHMENT WORKS AT ARAGON COURT FLAT 19-20 AVERY HILL CAMPUS (GRE RETI)
31 Jul 2019 10:12	Additional ITT Docs - Refurbishment Works at Aragon Court Flat 19-20	REFURBISHMENT WORKS AT ARAGON COURT FLAT 19-20 AVERY HILL CAMPUS (GRE RETI)
18 Jun 2019 13:35	response test	Southwood Site Refurbishment
22 May	NEC4 Contract	Scheduled Bus and Coach Services 2019-2024

- 8.4 Correspondence can also be accessed via your current project along the tabbed titles in the project details.



The screenshot displays a web application interface for Tender Management. At the top, there is a navigation menu with links: Home, Procurement and Guidance, Messages, Tenders, Contracts, Company Details, Help, and Logout. Below the navigation is a blue header bar with the text 'Tender Management'. A red notification bar below the header states 'Your return has been opened by us'. The main content area features a tabbed interface with tabs: Tender, Quote Documents, Testing 123 Lots, Correspondence (1), and History. The 'Correspondence (1)' tab is active. Below the tabs, there is a section titled 'Demonstration Project' with a small icon of a book. The details for this project are as follows:

Title :	Demonstration Project
Procedure :	Unspecified
Reference :	123-Go
Description :	Demonstration for user-guides and manual updates.

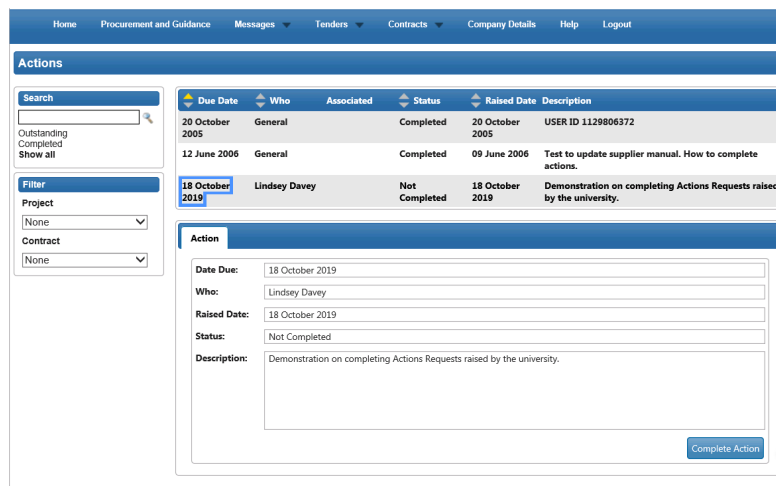
- 8.5 select the **Messages** button at the top of the page, then select **Correspondence**.
- 8.6 If you would like to send us correspondence select the **Create New Correspondence** on the left hand of the screen. And a Pop-up will appear complete and select **Send**.

View & Complete Actions (9)

This procedure is used to send you tasks which should be completed by a certain date, the actions will send out automatic reminders for you to complete.

If you complete an Action without carrying out the task it may result in information being out-of-date and you may be disqualified from the Approved Suppliers List.

- 9.1 A notification of **1 outstanding action** will highlight on your home screen you can either click the link or select **Messages** and drop-down to **Actions**.
- 9.2 This will take you to the below screen. Select **View Action**



Due Date	Who	Associated	Status	Raised Date	Description
20 October 2005	General		Completed	20 October 2005	USER ID 1129806372
12 June 2006	General		Completed	09 June 2006	Test to update supplier manual. How to complete actions.
18 October 2019	Lindsey Davey		Not Completed	18 October 2019	Demonstration on completing Actions Requests raised by the university.

Action

Date Due: 18 October 2019

Who: Lindsey Davey

Raised Date: 18 October 2019

Status: Not Completed

Description: Demonstration on completing Actions Requests raised by the university.

[Complete Action](#)

Picture 1 In Your Action Screen

- 9.3 Ensure requests are completed and **Complete Action** to stop the system generating further reminders.

System Upgrades (10)

- 10.1 The system will receive updates; therefore guides will be reviewed to ensure consistency and ease of use by suppliers.

Amendment No.	Date	Section	Action	Amended By
1.	22/03/07	Tender	Created Guide to upload Tender Documents	LTD
2.	15/01/08	Registration & emails		LTD
3.	29/10/08	Upload Tender	Updated Guide to upload Tender Documents	LTD
4.	29/10/08	Updating Documents	Updated guide to uploading documents	LTD
5.	18/10/19	Guide Updated	Updated guide due to site reconfiguration.	LTD
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				
16.				
17.				
18.				
19.				
20.				
21.				
22.				
23.				
24.				
25.				
26.				
27.				
28.				
29.				
30.				