PCC InTend E-Sourcing Solution – Frequently Asked Questions
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1. Why is Portsmouth City Council using an e-sourcing solution?

Using the InTend e-sourcing solution will help us to make improvements in:

1. The cost of conducting tender and quotation processes.
2. The efficiency with which these processes are conducted.
3. The transparency and openness of the authority internally and externally to our suppliers and other interested parties.

i) Cost

Electronic transmission and storage of documentation should facilitate cost savings associated with:

- Paper usage
- Printing
- Postage

This will not only reduce our financial costs but will also reduce the costs to the environment through paper production, energy consumption, transportation, etc.

However, the major savings will come through freeing up time of our staff who work on administering procurement exercises. This will not only save money but will also allow our technical staff to concentrate more on the quality of the tender documents that contain the information with which we ask you to base your bids on and against which you will be evaluated.

ii) Efficiency

Implementing the InTend solution will provide us with the opportunity to review the current processes used by ourselves in procurement and our colleagues working in other departments across the authority. This will aid us in taking a more consistent approach to the way we carry out procurement processes as an authority and ensure that the methods utilised are both effective and efficient. Using the InTend system will aid us further through facilitating:

- Sharing of standard documents across authority
- Sharing of supplier information across authority
- Sharing of contractual information across authority
- Standard automated methods for evaluating supplier returns
- Standard automated methods for evaluating contractor performance

iii) Transparency

The InTend solution will allow us to keep track of all procurement projects and contracts being run through the system. It will not only allow us to identify how far a project has progressed but will also allow us to quickly view all of the actions that have taken place on that particular project since it was first created. These will be recorded down to exactly who accessed the project, the nature of the action that was carried out (documents published by PCC, documents returned by supplier, etc.) and the exact time and date that it was done. The system will also maintain an audit trail of all of your actions against a particular project in addition to those carried out by our staff. This will allow us to keep far tighter control on our projects, reducing the risk of project failure and delays.

The system will help us to work together more effectively as an organisation and also with other organisations such as neighbouring local authorities. The improvements in communication provided by using InTend should help us to reduce costly duplication of work and backlogs where one department or authority is reliant on another to ensure that a project progresses to the next stage.

Currently we rely on the press to advertise our requirements and as such are restricted by the timescales they impose on us which can subsequently result in delays. Through using InTend we will be able to advertise requirements as soon as they have been properly identified helping us to satisfy these requirements more efficiently and provide a better level of service to our internal customers, potential suppliers and the public.

Once fully implemented all lower value quotation exercises that we undertake will be processed though InTend, in addition to our formal higher value tender exercises. This will provide us with visibility of procurement projects of every value helping us to ensure that all projects are conducted fairly and provide value for money through the use of fair and transparent competitive processes.

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2. How will using InTend be of benefit to my organisation?

Similarly using the system should also facilitate the realisation of cost, efficiency and transparency benefits to you.

i) Cost

Electronic transmission of documentation via InTend will also allow you to reduce expenditure on paper, photocopying and postage, reducing your direct overhead costs and the costs your operation has on the environment. Also, using the system will allow you to make your returns right up to the point of closing date and time allowing you to spend more time putting your bid together. Although we would advise you to give yourself five or ten minutes breathing space unless you enjoy living life on the edge! This could also help you to reduce your expenditure on costly courier services that are often utilised to ensure that deadlines are not missed.

ii) Efficiency

Registering with the system will allow you to introduce your organisation to the authority in one go, saving you time and money on promotional material that may not get read due to our busy workloads. The system is also accessible 24 hours a day 7 days a week allowing you to obtain and return documentation whenever is most convenient to you. In addition as the system is accessed and run via the web you and your colleagues can view documentation and work on bids even if you are working at opposite ends of the country or the world, potentially saving you time travelling to and sitting in meetings.

Although we are not quite there yet, we are assisting InTend in the development of new functionality that will negate the requirement for you to continually fill out PQQ's (pre qualification questionnaires) for every opportunity you wish to be considered for. Although, this is not ready yet the system does currently allow you to store documents with your company details so you could take the option of storing your most recent PQQ submission in this area. You could then review and update the PQQ if required the next time you wish to be considered for one of our opportunities. The system will also send out automatic reminders via email to alert you when insurances or health and safety standards you have uploaded onto the system as part of your company details are due to expire.

iii) Transparency

The system maintains a full audit trail recording all of the actions that have taken place within it. This audit trail is also readily accessible to you through clicking on the 'View Tender History' button once you have logged into the system and accessed the project through clicking on the 'My Tenders' button on the left of the screen. This allows you to see exactly which stage the project is at and the most recent actions that have been undertaken by us and yourself. This should help you to keep track with what you have done on the system and save you time chasing us up for information on progress.

All procurement projects will be run through the system including lower value quotation exercises. Although it is not currently our intention to advertise all of these lower value requirements using InTend you will be able to access information on lower value work that we have awarded. You will be provided with visibility of which of our departments commissioned the work and who the responsible officer was which should be of assistance to you in becoming involved in future opportunities that we would have been unable to provide following our manual processes.

Furthermore, the system will act as our supplier directory and so will replace any lists that may have been used before. Therefore, in registering with the system we would advise you to take care to register your organisation against the appropriate business categories that you are capable of delivering. Further information is contained within the 'Supplier Registration User Guide'.
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3. How will information about my organisation be kept secure?

Access to the system is password protected. In registering with the system you will be required to enter an email address and a password of your choice. You will then use your user name and password to log into the system and view your company details, returns, etc. Top

4. How will information I send through the system be kept safe from interception by hackers?

All documentation and other information transmitted through the systems is automatically encrypted. The only users able to view the information are those that either we or you have assigned as recipients. As such, in the unlikely event of someone intercepting information they would not be able to make any sense of it and so would not be able to use it to their advantage in any way. The method of encryption used within the system is to the same security standards as those used by the MoD and has been extensively tested. Top

5. When I register with the system what information on my organisation should I ensure that I provide?

(The following covers the basics of the registration process, however please refer to the Supplier Registration User Guide that we have made accessible on our website when registering your organisation.)

In first registering with the system on screen 1 you will be required to provide the following information:

- Company name
- 1st line of address plus post code
- Telephone number
- E-mail address for notifications to be sent to

This will allow you to progress to screen 2 where you will be able to register your organisation against any business categories your operation is equipped to provide. This information is not mandatory, however it is very important that you take time to complete this part of the registration process. We will search against business categories in our area of the system to find appropriate suppliers who we may then invite to bid for lower value works that will not be processed through a formal advertised tender process. As such, if you do not register your organisation against any of these categories you are running the risk of missing out on potential future opportunities to do business with us.

On the 3rd screen you will be able to register yourself as a user, which once you have completed the mandatory fields, will enable you to log into the site, express interest in current opportunities and view and update your company details. In order to do this you will need to input the following information:

- First name

- Surname
- E-mail address
- Password (min 6 characters)

Once you have inputted this information you can proceed to screen 4, the final screen, that provides you with a summary of all of information you have entered. If there is anything that is incorrect you are able to go back and amend your details accordingly.

You will now be able to log into the system and view your company details where you can input further information on yourself and your company, such as:

- Full company address
- Your job title, department, etc.
- Number of employees
- VAT number
- Company registration number
- Accounting details
- Banking details
- Insurance details
- CIS certification
- Corgi registration
- Details of any accreditations
- Business categories

Although providing information relating to the areas above is not mandatory we would strongly advise you to take the time to input this information. As we will use the system as our supplier database, the more information you can provide us with may increase the chances of you being invited to quote for lower value works. Top

6. What if I make a mistake registering my organisation on the system?

If you make a mistake during registration do not worry. When you log into the system you will have access to update all of the information you provided through logging in and clicking on the ‘Company Details’ on the right of the screen. Please do not attempt to re-register or we could end up in the position of us inviting both of the companies you have registered so that in effect you would be competing against yourself. Top

7. What if additional people from within my organisation require access to the system?

You should not tell your colleagues to register themselves as this could result in having two registrations for your organisation appearing on the system. Instead you should log into the system yourself and click on the ‘Company Details’ button on the right of the screen. You will then need to select the

‘Company Contact Details’ button to access a screen where you will be able to view details of all of the people from within your organisation who currently have access to the system. From here you can edit or remove your company contacts or add new individuals to provide access to colleagues. Top

8. What if the system becomes unavailable whilst I’m working on it?

As the system is internet based there is the danger of the system becoming unavailable due to internet wide problems. As soon as you become aware of any problems contact us here at the Procurement department on 023 9284 1262 and we will investigate and get back to you and any other organisations taking part on the project to ensure fair treatment. Top

9. Where can I get help if I experience difficulties using the system?

There are a number of options open to you to obtain help depending on the particular nature of the problems you are encountering.

i) Problems with logging into the system

If you enter the wrong password or user name more than twice for security reasons the system will lock you out and deny you access to the site even if you subsequently enter the correct details. If you have forgotten your password there is a large red button that reads ‘Forgotten your details? Click Here’. If you click this button your password will be promptly emailed to you. However your log in will still be locked and you will need to contact our ICT Security department on +44 (0) 23 9283 4781 who will unlock your account for you. The line is open between 8am – 5:30pm Monday to Thursday and 8am – 5pm on Fridays.

ii) Problems with operating the system

We have prepared a ‘Supplier Registration User Guide’ and a ‘Supplier Document Return User Guide’ that are accessible on our website and take you through the processes you will need to follow in registering and subsequently obtaining and returning documents using the system.

In addition to this there is also extensive on-line help available on the system that you can access through clicking on the ‘Help’ icon located towards the bottom of the left hand side of the screen. InTend also provide an expert help line available between 8am – 6pm Monday to Friday. The number is +44 (0) 1332 869 400 or alternatively you can email your query using support@derventiosolutions.com.

iii) Queries regarding documentation and other information

If you have technical questions regarding specifications, terms and conditions, timescales, etc. these should be addressed to our contact for the project whose details you should find in the tender advert on our external site or in the tender description accessible through logging onto InTend. We run a flexi time scheme with core working hours falling between 9:30am – 4:00pm. Although it is the norm for our staff to begin earlier and / or finish later than these times if you call between these times you can be assured that your query should be dealt with, leave, meetings and other arrangements permitting. Top

10. How will I know when to access the system to obtain documentation?

You will be sent an email from the system as soon as documentation becomes available on the site alerting you of this and asking you to log onto the system. As such, although in registering with InTend you are required to enter your email address twice, you should be careful to ensure that you make no mistakes in registering this section of your details. Please ensure that you refer to the 'Supplier Return User Guide' for a more detailed explanation of this process. Top

11. How will I know that my return has been submitted successfully?

Once you have uploaded the documentation you wish us to consider as part of your bid onto the system you will still need to click on the red 'Submit Return' button. **Simply uploading the documentation will not transmit it to us** and without clicking this button we will not be able to access the documentation. Also, please ensure that you have uploaded all of the documentation you wish to be considered before submitting your return. Depending on the project we may have set up the system to block multiple returns and so you may not have another chance to submit. Top

12. What if I have accidentally submitted documentation before I wanted to?

In this instance you should contact us straight away on +44 (0) 23 9284 1262 or email using procurement@portsmouthcc.gov.uk, however, in this instance it would probably be best to call to ensure a quick response. If you notify us at least two working days prior to the submission deadline then we will be able to temporarily reconfigure the system to allow you to resubmit. However, any requests to resubmit received within 2 working days of the deadline will be left to the discretion of our lead officer for the project and as such we cannot provide any assurances that you will be able to resubmit in these cases. Top

13. How can I keep up to date with a tender I am involved in?

The system will notify you via email whenever there is a change in the status of a tender you have expressed interest in. However, if you have accidentally permanently deleted one of these emails or have access to the internet but not to your inbox you can still keep up to date with any developments. If you log onto the system and click on the 'My Tenders' option on the right hand side of the screen you will be able to access all of the tenders you are involved in. Directly under the title of each of the tenders you are attached to you will see two fields, 'Status of Tender' and 'Status of Latest Stage', that

provide information on at what stage the tender has progressed to and your current status in relation to the tender. To ensure that you are kept fully up to date you should regularly click on the refresh button on your internet browser.
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14. Is there a limit on the size of files that I can transmit through InTend?

No limit is imposed on file sizes that can be sent though the system. The limiting factor is the speed of your internet connection. If you have a very fast connection you will have no problems submitting documents of any size, however if it is fairly slow you may encounter difficulties. The system providers recommend average file sizes of between 10-15MB. Also, if you want to include images, graphs, photos, etc. within word documents we would advise you to insert them into the document using the 'paste special' rather than the 'paste' function. You should then choose the option of inserting the file as a Word picture. This will greatly reduce down the file size and ensure that your documentation is submitted to us swiftly. Top

15. Can I transmit all file types through InTend?

InTend can handle all file types including office documents, CAD drawings and PDFs. However, a large number of machines used by us here at PCC are only equipped with Microsoft Office 97 software. As such there is a small risk that if you use later versions that we may not be able to open them. In view of this we would advise you if possible to complete your documentation using Microsoft Office 97 or if this is not possible ensure that your software is set up to be compatible with this earlier version. Also, you should upload documents from your desktop or hard drive, not from across a server as this can sometimes cause problems. The system providers also recommend that you avoid using unnecessarily long file names and those that contain the characters **' , * () &**. Top

16. How do I view and reply to correspondence sent using the system?

Viewing Correspondence

If we send out correspondence via the system you will receive an automatically sent 'Correspondence Notification from Portsmouth City Council" email notifying you that additional information is now available for a tender you are involved in.

To view the correspondence you will need to log onto the system. Once you are logged on, in the main area of the home page under 'You currently have:' will be a message saying that you have 1 piece of unread correspondence in red text. To view the correspondence click on the text link which will then take you through to the correspondence page.

From the correspondence page you will be able to view a summary of the correspondence showing the date and time it was sent, the tender it is associated with and whether any attachments are included. Under options there is a ‘View Message’ button, click on this button to view the correspondence. From the message window you will also be able to view and download any attachments.

Replying to Correspondence

To reply to the correspondence click on the ‘Reply’ button, you can then type in your message on the following screen. If you wish to attach any documents click on the ‘Browse’ button to access your drives. Once you have selected a document click on the ‘Attach’ button. The document will now appear under the ‘Attachments’ section of the screen. You can now view the attachment to check that it’s the right document and remove it if it isn’t. You can also add additional attachments following the process you followed for attaching the first one. When you are happy with your message and have attached all required documentation click on the ‘Send’ button.

Viewing the Correspondence Log

When you log onto the system again you can view all of the correspondence that has been sent to you and those that you have sent yourself. Those sent to you are identified with a blue right pointing arrow and those that you have sent are identified with a red left pointing arrow. To view each piece of correspondence click on the ‘View Message’ button.

You can use the options under the filter heading to only show correspondence related to a specific tender or contract you are involved in or to only show received, sent or unread correspondence.

Creating New Correspondence

To send your own correspondence that is not in reply to any you have received from us click on the ‘Create New Correspondence’ option on the left of the screen. Ensure that the correspondence you are sending relates to the tender or contract you are involved in through selecting from the drop down lists. If the correspondence relates to a specific stage of that tender use the drop down list to select the appropriate one. You should then enter the subject of the message, the actual message itself and upload any attachments that you wish to send to us.

When you are happy that the correspondence is allocated to the correct tender/contract, correct stage (if appropriate), the subject of the message, the content of the message and that all of the required documentation has been attached click on the ‘Send’ button. The system will then open a window confirming that the correspondence has been successfully sent. Top