

# **Step by Step Supplier Guide**

To

## **University of Surrey e-Tendering System**

## Introduction

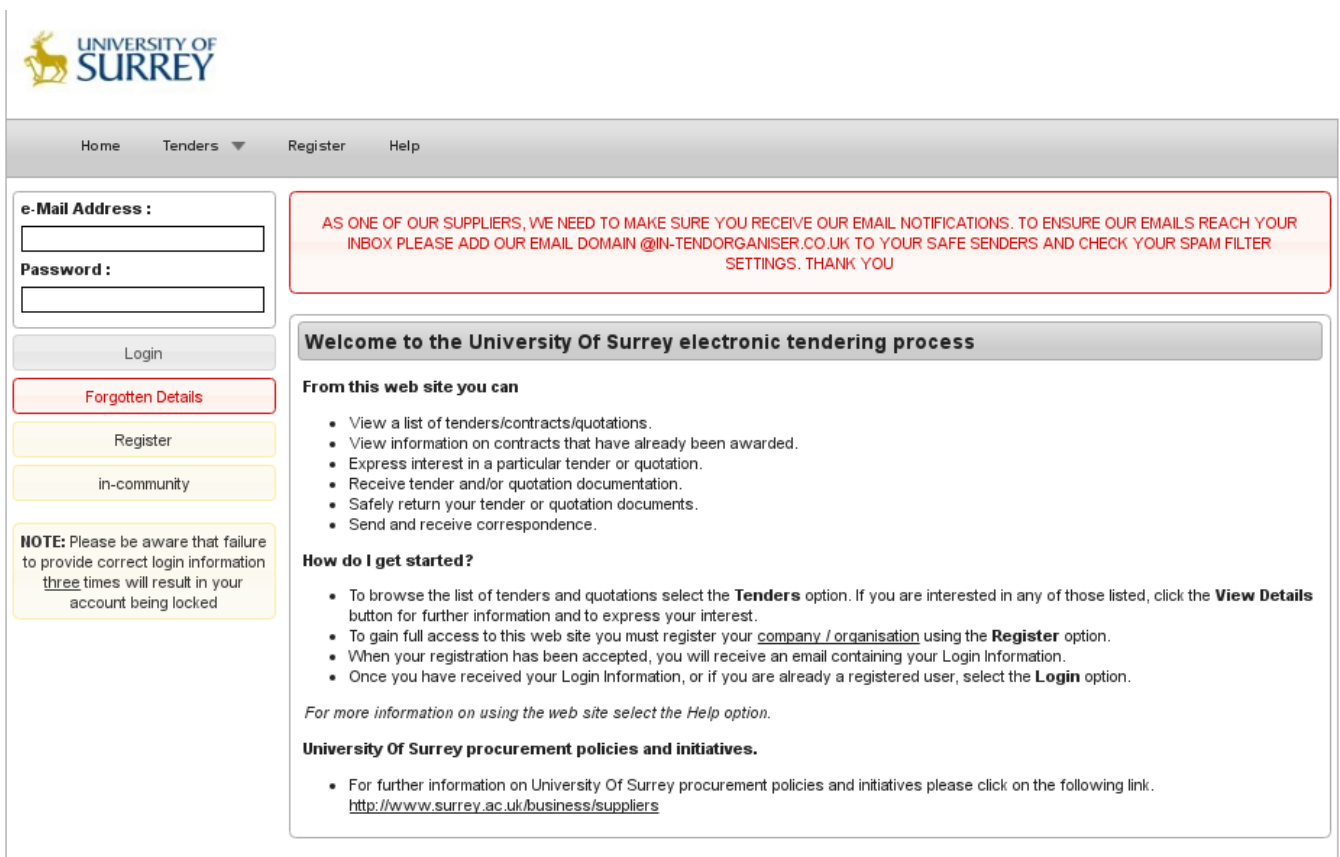
This **Step-By-Step Guide** is provided to assist you in using the (In-tend) e-tendering system. Once you have registered, you will be able to maintain your company information, return tender submissions and maintain company/contract documentation in a secure area via the internet.

If you encounter any difficulties whilst using the system you can contact our Support team by phoning 0844 2728810 or emailing [support@in-tend.co.uk](mailto:support@in-tend.co.uk)

## Registering on the e-Tendering system

Visit <https://in-tendhost.co.uk/universityofsurrey/asp/Home> to access the (In-tend) supplier portal.

From the homepage click on **Register**



The screenshot shows the University of Surrey e-tendering system homepage. At the top left is the University of Surrey logo. A navigation bar contains links for Home, Tenders, Register, and Help. On the left side, there is a registration form with fields for 'e-Mail Address' and 'Password', a 'Login' button, and buttons for 'Forgotten Details', 'Register', and 'in-community'. A 'NOTE' box states that three failed login attempts will lock the account. A large red-bordered box contains an email notification instruction: 'AS ONE OF OUR SUPPLIERS, WE NEED TO MAKE SURE YOU RECEIVE OUR EMAIL NOTIFICATIONS. TO ENSURE OUR EMAILS REACH YOUR INBOX PLEASE ADD OUR EMAIL DOMAIN @IN-TENDORGANISER.CO.UK TO YOUR SAFE SENDERS AND CHECK YOUR SPAM FILTER SETTINGS. THANK YOU'. The main content area is titled 'Welcome to the University Of Surrey electronic tendering process' and lists features available on the site, such as viewing tenders, expressing interest, and receiving documentation. It also provides a 'How do I get started?' section with steps for browsing tenders, registering, and logging in. A link to 'University Of Surrey procurement policies and initiatives' is provided at the bottom.

## Registration process

As part of the simple registration form you will be asked to complete your **Company Details**, **Company Contact Details** and **Primary User Details**. Email alerts and actions will be sent to the email addresses you provide, so if possible it is useful to enter a general company email address in the **Primary User Details** section such as info@\*\*\*\*\*.co.uk.

For cases where this person or inbox may be unavailable, we strongly recommended you add an **Additional User** (located at the bottom of the screen) so they can gain access to the site and also receive a copy of the emails. All Yellow fields are mandatory

The screenshot displays a registration form with three main sections, each highlighted with a red arrow pointing to its header:

- Company Details:** This section includes fields for Company Reg No (yellow), Company Name (yellow), Address Line 1 (yellow), Address Line 2, Address Line 3, Address Line 4, Post Code (yellow), and Country (dropdown menu). There is also a checkbox for "I do not have a Company Reg Number".
- Contact Details:** This section includes fields for Telephone (yellow), Fax, Web Site, and Construction Line No.
- Primary User Details:** This section includes fields for Contact First Name (yellow), Contact Last Name (yellow), Telephone, e-Mail (yellow), Confirm e-Mail (yellow), Password (yellow), and Confirm Password (yellow).

At the bottom of the form, there is a note: "It is recommended for situations where the primary contact is not available, additional points of contact are registered as they would still be able to gain access. While registering you may only add one additional point of contact, however after the registration is complete you may login to your account and add as many additional contacts as you like."

Whilst registering you may only add **one** additional point of contact, however after the registration is complete you may login to your account and add as many additional contacts as you like.

It is recommended for situations where the primary contact is not available, additional points of contact are registered as they would still be able to gain access. While registering you may only add one additional point of contact, however after the registration is complete you may login to your account and add as many additional contacts as you like.

**Additional User Details**

Contact First Name :  Contact Last Name :

Telephone :  e-Mail :

Confirm e-Mail :  Password :

Confirm Password :

[Register My Company](#)

In the **Business Classifications** tab you are able to add the business category codes relevant to your company. Enter a keyword or click on the search button to see the full list of available categories. Click the blue + symbol to add a category you require. You can add multiple categories.

Once you are happy with the details click on **Register My Company**

**Company Details** **Business Classifications**

**Classifications**

Search :  [Search](#) [Clear](#)

Category	Title	
	Unspecified	+
A	Audio-Visual & Multimedia	+
AA	Audio Equipment including Video Conferencing, Televisions, Videos	+
AB	Display/Projection Equipment & Consumables	+
AC	Learning Packs	+
AD	Music	+
AE	Photographic Equipment Supplies & Services	+
AF	Studio Costs	+
AG	Theatre Costs	+

**Category** **Title**

[Register My Company](#)

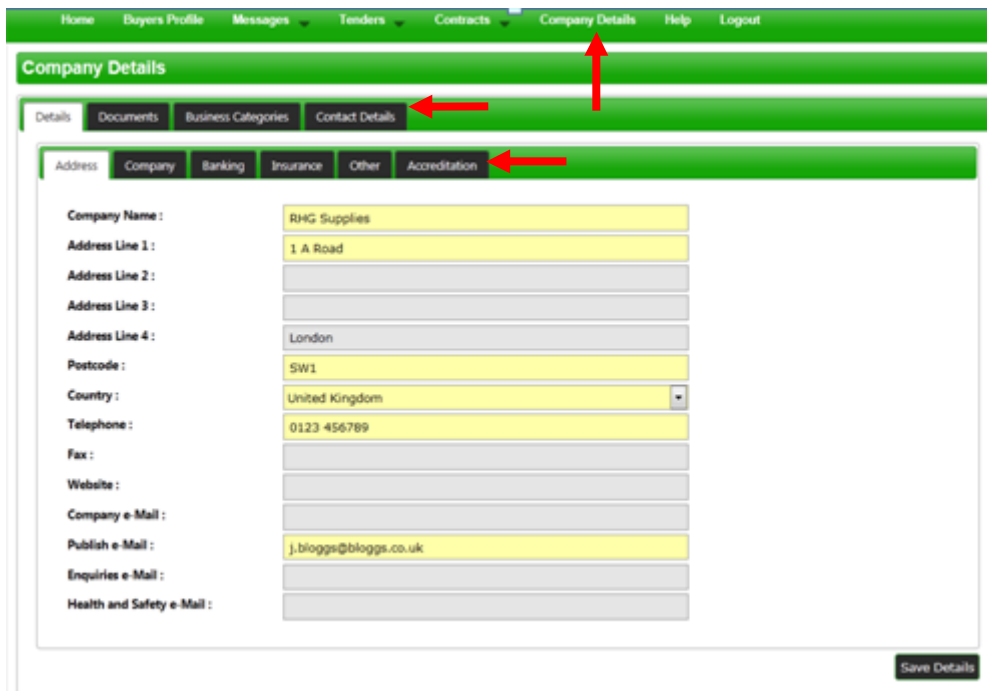
You should not register your company more than once, unless they are under a separate company registration number. If your company has several locations, register the company against the head office and add contact details for individuals at the different locations. You can add one additional user at the time of registration. Once registered, you can add several contacts in the **Company Details** section.

Once registration is complete, the system will then thank you for registering and inform you that your details are being processed. You will then shortly receive an email with confirmation of your email and password.



## Managing your Company Details

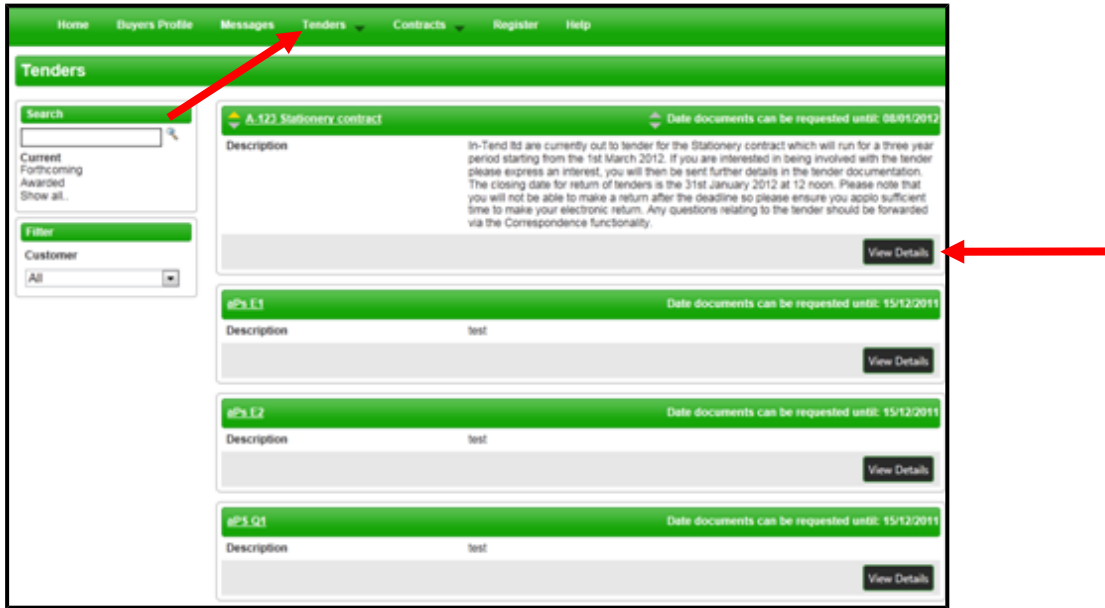
If you need to update your company information you can do this from the **Company Details** section on the top menu bar. From here you can edit/add information regarding the company, contact details, company documents and business classifications.



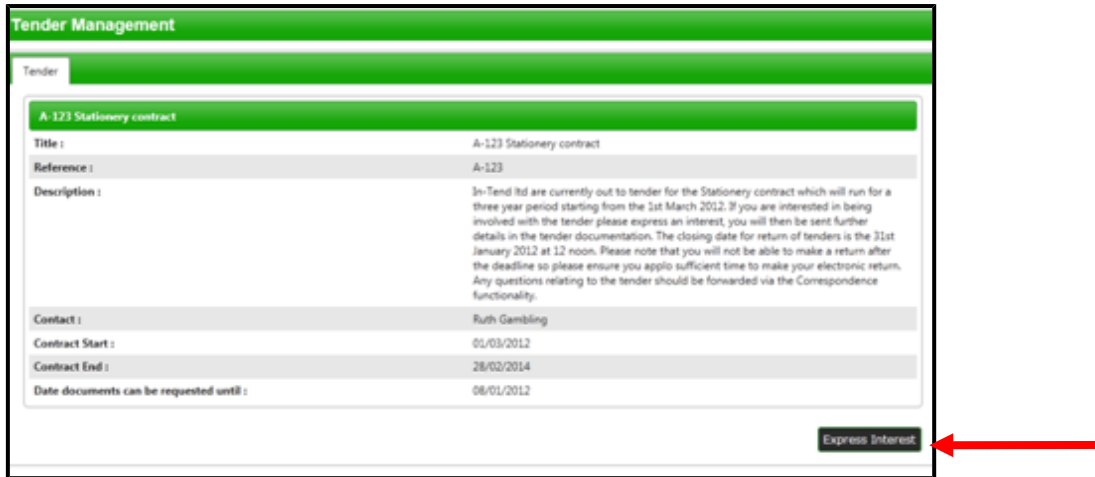
**Please note that it is important that you do keep your details up to date, particularly your contact email addresses as you may miss out on tender opportunities which may be of interest.**

## Tender Opportunities

To access tender opportunities hover over the **Tenders** section at the top menu bar and then click on **Current**, this will provide you with a full list of current tender opportunities. For a tender that you are interested in you should click **View Details**

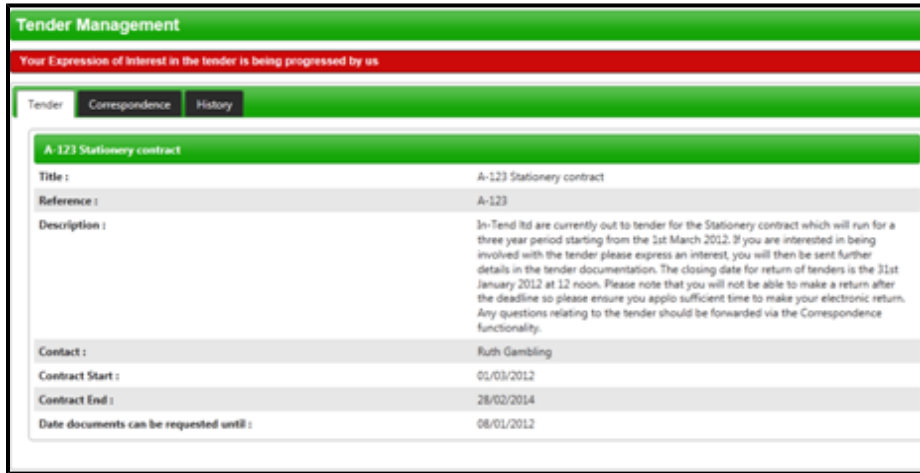


From the Tender Management screen you are able to **Express Interest** in the tender.



You will then be asked to either log into an existing account or register a new one.

Once you have expressed your interest you will instantly see an update as to your status in the tender process and it will tell you that your expression of interest is being processed.



Once your expression of interest is received and accepted by the organisation (this may not happen straight away) you should receive an email saying that you have received tender documents and you should login to the secure area of the website to access them. If documents are immediately available, you will be taken straight to the latest tender stage screen.

If you are not currently logged in, from the homepage you should enter your email address and password then click **Login**.

e-Mail Address :

Password :

Login

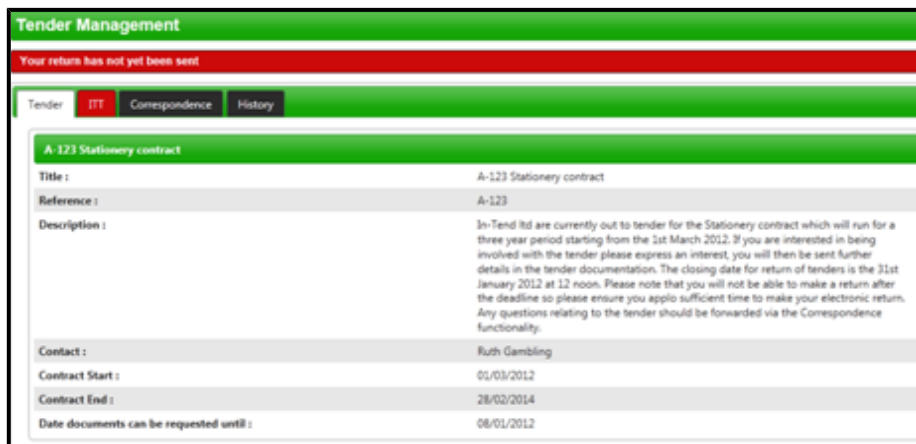
Forgotten Details

Register

NOTE: Please be aware that failure to provide correct login information three times will result in your account being locked

**\*Please note that you are given three attempts to enter your email address and password. Please ensure you click the **Forgotten your Password** button if you cannot remember your details otherwise your account will be locked!**

Once you are logged in, go to the **Tenders** section at the top menu bar and click on **My Tenders**, find the tender that you are dealing with and click **View Details**. From the Tender Management section, you can easily see what your status is within the tender process. You will be able to see tabs running across the top. The tab which is **RED** is the current stage of the tender process (eg. Pre Qualification Stage, Invitation to Tender stage).



## Submit Tender Return

If you click on this tab (e.g. 'ITT') you will go into the section where you can access the tender documents. At the top of this section you will see instructions as to how to attach and submit documents which you should read carefully as they talk you through step by step. In this section you will see the follow headings:

- **Tender Documents Received:** View and/or download tender documents received
- **My Tender Return:** If any mandatory documents have been requested, they will be shown in the **My Tender Return** section against a **Red** button. You will need to attach them using the **Attach Documents** button within the **My Tender Return** section at the bottom of this screen.  
If a Questionnaire is required to be completed, it will be shown in **Red** and marked **Not Started** in the **My Tender Return** section. It is mandatory that any Questionnaire's must be completed.
- **Attach Documents** (if available): Attach any additional documents you wish to return as part of your tender submission; these will upload to the **My Tender Return** section.
- **Submit Return:** Click the Submit Return button only when you are completely happy that you have all the documents uploaded that you need to submit.



**How To Attach & Submit Documents**

1. If any mandatory documents have been requested, they will be shown in the **My Tender Return** section against a **Red** button. You will need to attach them using the **Attach Documents** button within the **My Tender Return** section to the bottom of this screen.
2. If a **Questionnaire** is required to be completed, it will be shown in **Red** and marked **Not Started** in the **My Tender Return** section. It is mandatory that any **Questionnaire's** must be completed.
3. To attach additional documents you wish to submit as part of your tender return, click the **Attach Documents** button under the **My Tender Return** section (if available). These will then appear in the **My Tender Return** section.

NOTE : Large files may take some time to upload. We advise you to keep the files under 5MB.

4. When you have completed all the above steps and are ready to submit your tender return, click the red **Submit Return** at the bottom of this page.

Server Time : 08/12/2011 13:59:39    Due Date : 31/01/2012 12:00:00    Time Remaining : 0 Weeks 22 Hours 20 Seconds

**Tender Details**

Stage Name	ITT
Description	This is the Invitation to Tender stage
Closing Date	31/01/2012
Stage Start Date	08/12/2011
Project Title	A-123 Stationery contract
Project Description	In-Tend Ltd are currently out to tender for the Stationery contract which will run for a three year period starting from the 1st March 2012. If you are interested in being involved with the tender please express an interest, you will then be sent further details in the tender documentation. The closing date for return of tenders is the 31st January 2012 at 12 noon. Please note that you will not be able to make a return after the deadline so please ensure you apply sufficient time to make your electronic return. Any questions relating to the tender should be forwarded via the Correspondence functionality.

Tender Documents Received	Description	Options
In-Tend sample ITT.doc		<a href="#">View</a> <a href="#">Download</a>
Tech spec.doc		<a href="#">View</a> <a href="#">Download</a>
In-Tend sample TandCs.doc		<a href="#">View</a> <a href="#">Download</a>

My Tender Return	Description	Options
Insurance - Private Liability	Upload copy of Insurance certificate	<a href="#">Upload Document</a>
Health And Safety	Upload copy of Health and Safety Policy	<a href="#">Upload Document</a>

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. We advise you to keep file sizes under 5MB.

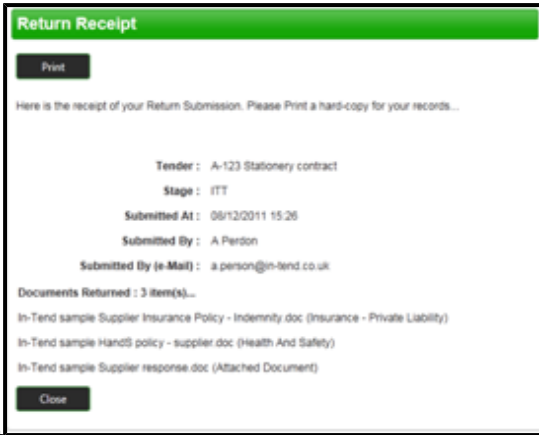
[Attach Documents](#)

**Submit My Return**

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

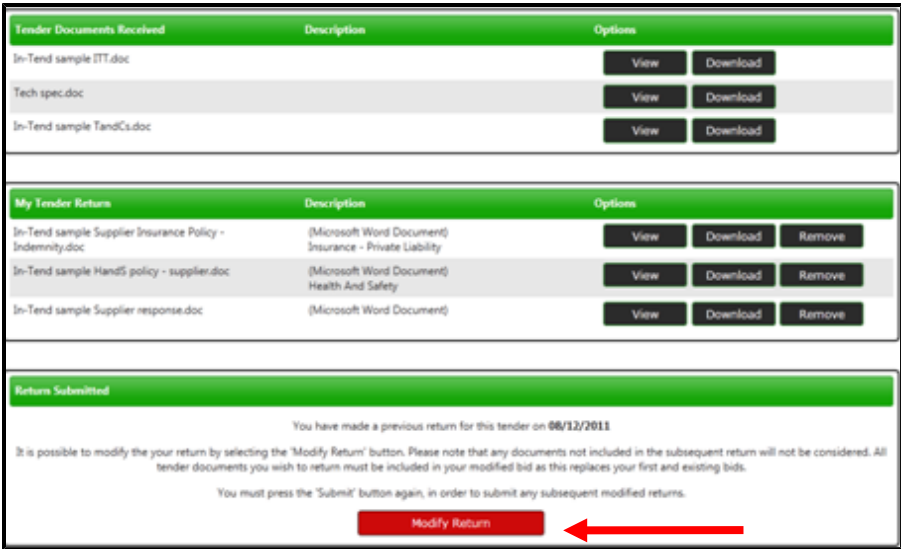
[Submit Return](#)

Once you have submitted your return you will be able to view a **Return Receipt** which confirms all the details of your submission. This will always be available to view within the **History** tab.



If for any reason you wish to amend your return you may be able to do so by going into the stage tab again. The screen visible will show you all the documents that you returned as part of your original submission. If you want to remove any documents or add additional documents you can do this now.

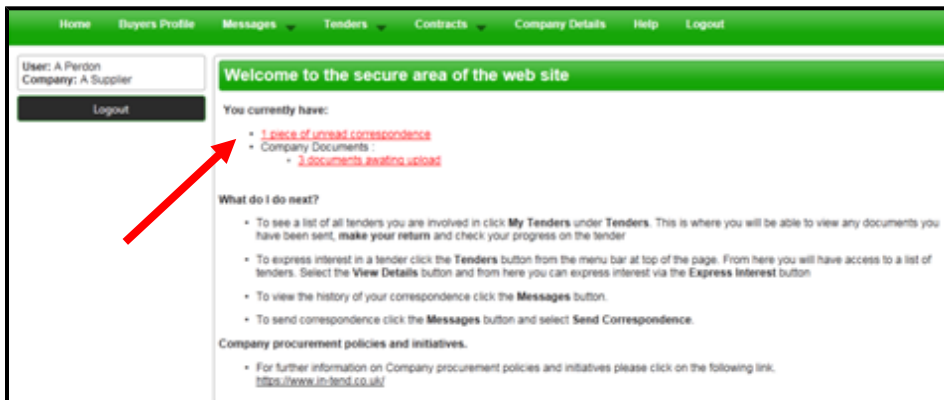
**Please note you should ensure that ALL the documents which you wish to be evaluated as part of your tender return are included in the My Tender Return section before you click on Modify Return as you are overriding the first return!**



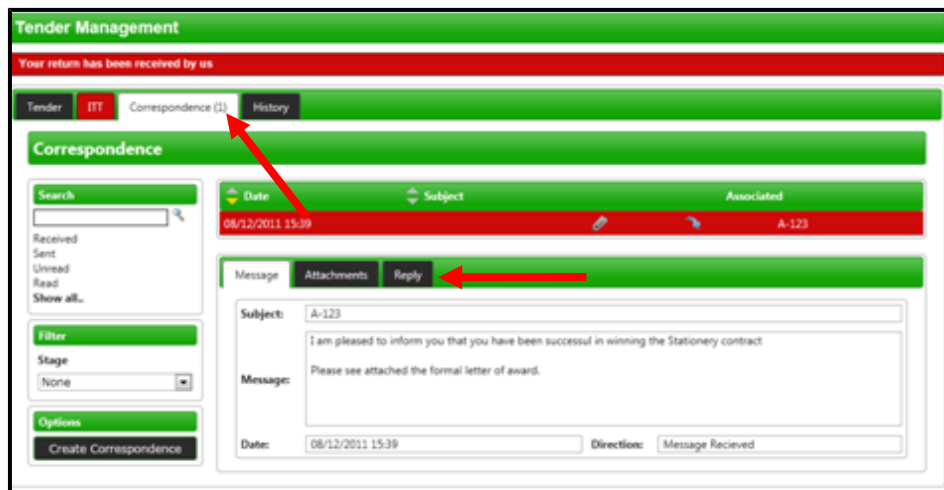
## Correspondence

This procedure is used to receive and send a communication regarding a tender/contract via the website.

If you receive Correspondence you will firstly receive an email alert informing you of this. You will need to login to the secure area of the system to view it. When you first login you will see on the homepage in red a prompt to say that there are unread correspondence. If you click on the link it will take you straight through to the message.



Alternatively, you can view the message through the Tender Management screen where it will tell you in brackets how many correspondence there are in the Correspondence tab. You can view the message, view any attachments and also make a reply.

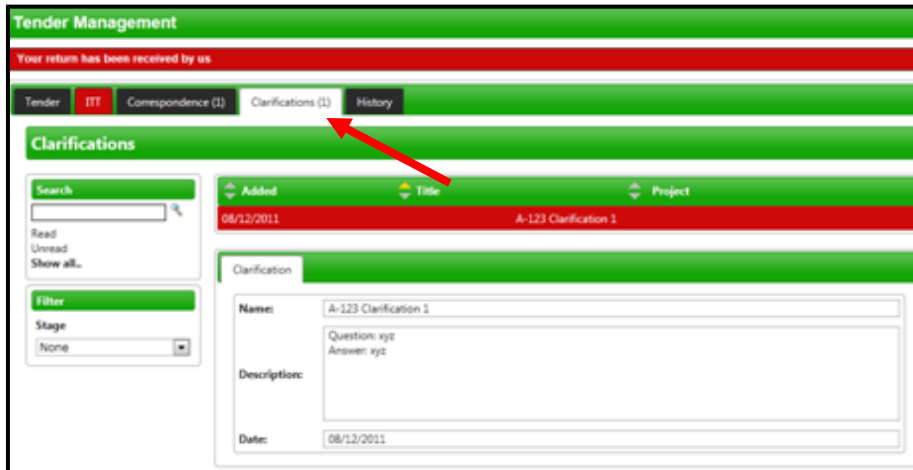


You can also view Correspondence through the **Messages** tab at the top of the screen



## Clarifications

If there are any Clarifications made against the tender you can access them by viewing the tender details and a new tab will appear. It will tell you how many clarifications there are in brackets. Click on the Clarifications tab to view.



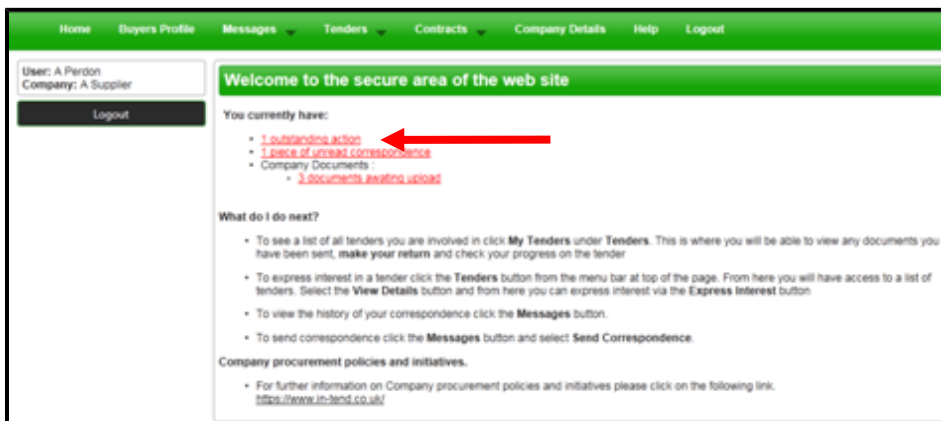
NB. If you require clarification regarding the tender you should send your clarification request via Correspondence

## Actions

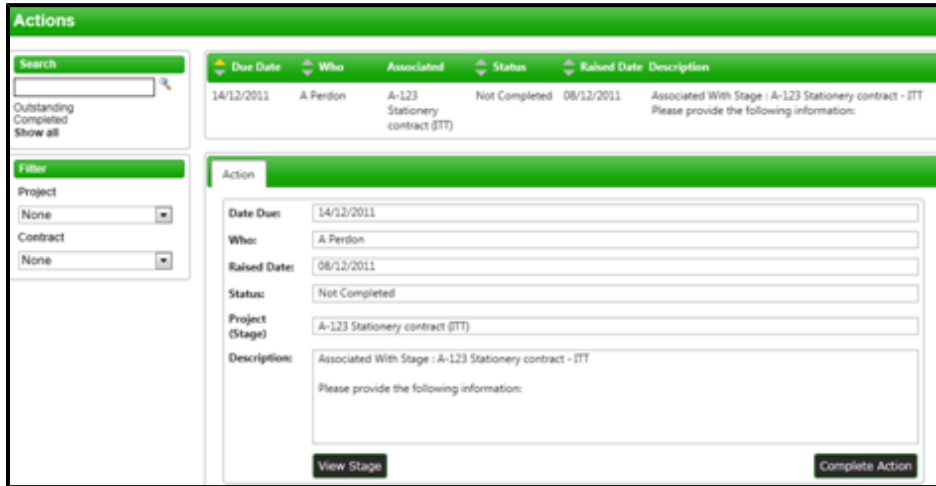
This procedure is used to send you tasks which should be completed by a certain date. The system will send out automatic reminders for you to complete Actions.

If you receive an Action email, log in to your homepage and a red link will appear on screen.

Click on the red link or hover over **Messages** at the top menu bar and then click Actions.



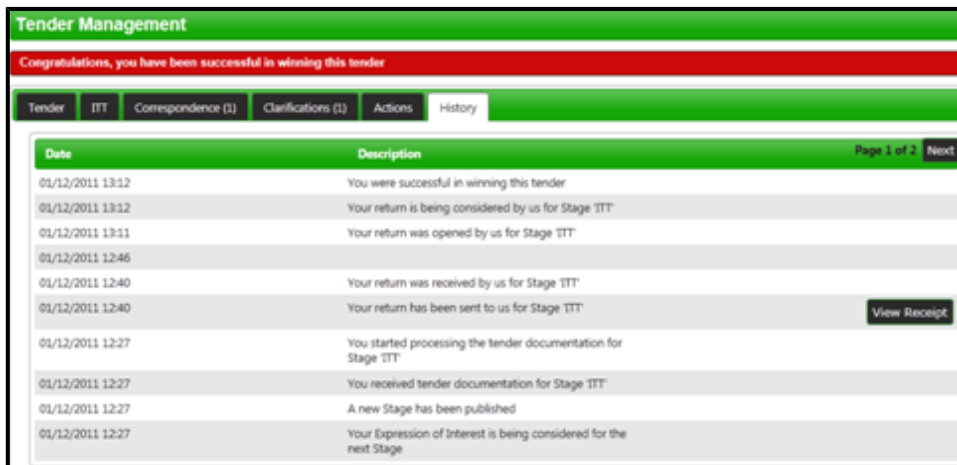
You will be taken to this screen where you can view details of the action placed against you.



Read through the Action and make sure everything requested is completed then click **COMPLETE ACTION**.

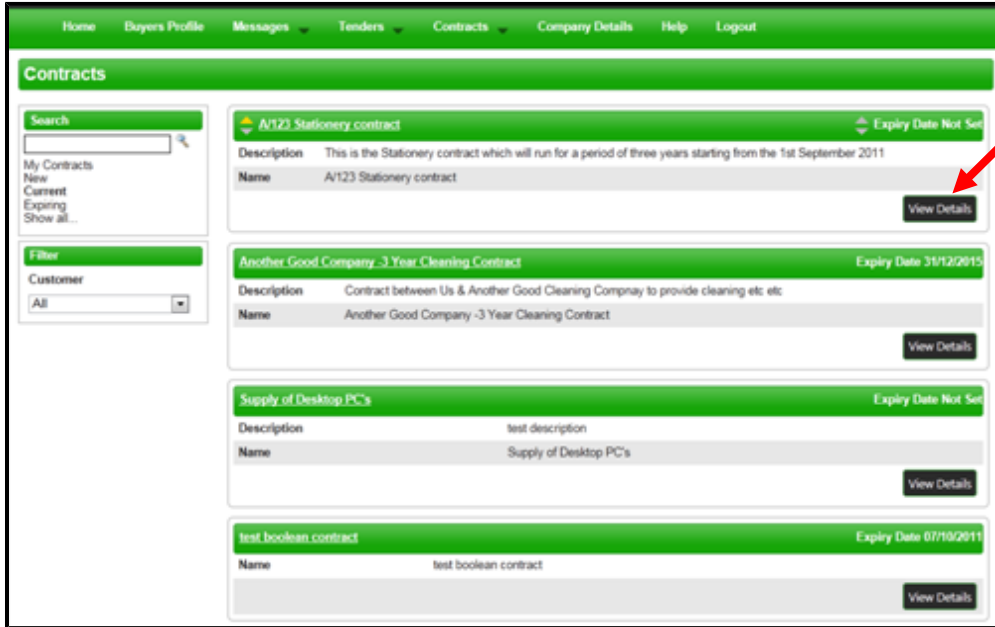
## Tender History

Within the My Tenders section you will see the History tab where there is a log of your involvement of the tender, right from your expression of interest to the current status.



## Contracts

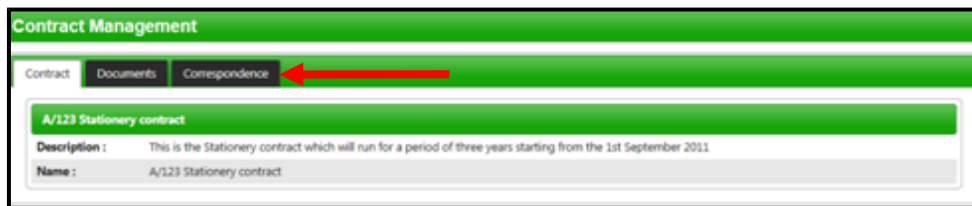
You can view a summary of what Contracts the Institution has running from the **Contracts** heading at the top menu bar (may not be available with some institutions).



If you are the contracted supplier you should log into the secure area of the website to be able to view specific contract information/documentation.

You can view this information by hovering over **Contracts** on the top menu bar and then clicking on **My Contracts** and then **View Details** for the relevant contract.

From this screen you can view contract details, see contract documents and send correspondence relating to the contract.



## Contract Documents

Contract Documents can be viewed in the Documents tab within the Contract Management section.

Some documents may have viewing rights only which you cannot replace eg. official contract, agreed terms and conditions etc.

Other documents may be for you to manage and keep updated eg: insurances, policies etc...

If you are required to upload a new revision of a document that has expired you will receive an email alert. You should login to the secure area of the website where you will see a prompt in red that contract documents require upload.



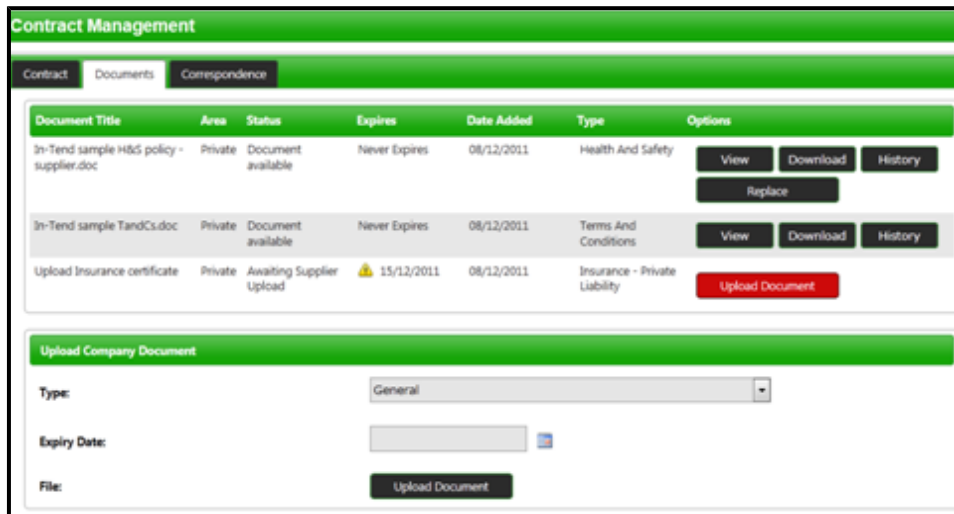
To upload these documents you should click on the red prompt or go into **My Contracts**, click **View Details** of the relevant contract and then click the **Documents** tab.



## Managing Contract Documents

From the documents tab you can view contract documents and replace/upload documents that you are responsible for maintaining.

You will be able to see a Replace button for the documents that may have expired (eg. Insurances) or that can be updated as and when (eg policies). You will also see a red Upload Document button for documents that have been requested by the contracting institution. If there is an expiry date in place you will be reminded until you upload the required document.



If you require any additional information or help, please contact the In-tend Support Desk.

### In-tend Support

Tel: 0844 2728810

Email: [support@in-tend.co.uk](mailto:support@in-tend.co.uk)