ATAMIS

Atamis User Guide

V3.0

Updated 22 January 2024

Getting Started

Atamis 3.0 improves procurement visibility and control throughout the strategic sourcing cycle.

Atamis has five core modules:

- Analyse: **Atamis SA** (Spend Analysis) formerly known as ProSpend
- Plan: **Atamis PM** (Pipeline Management)
- Source: **Atamis TM** (Tender Management)
- Contract: **Atamis CM** (Contract Management)
- Manage: **Atamis SRM** (Supplier Relationship Management)

Modules can be deployed independently as stand-alone applications or in various combinations. When used together, all Modules are fully integrated so reports and dashboards can derive their data from any combination of the above sources.

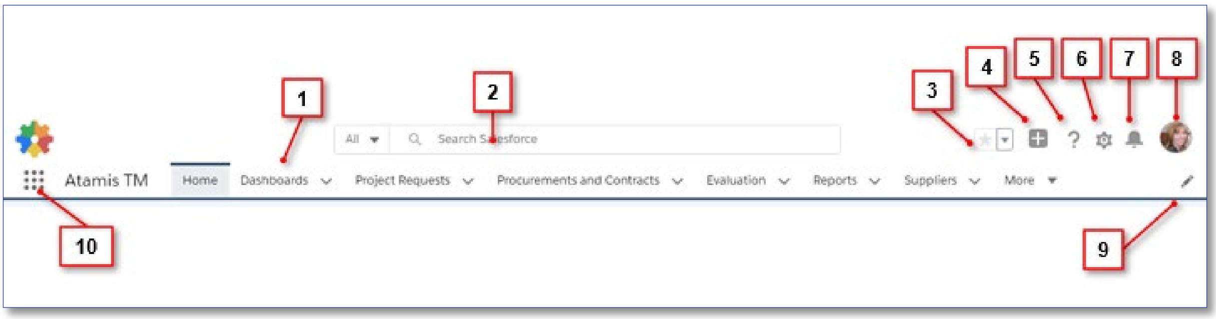
Using This Guide

If you are viewing this document as a PDF, we recommend using the bookmark feature ( ) in your browser or the hyperlinks from the Contents page to navigate.

The Atamis system is hosted on the Salesforce platform and benefits from a number of generic Salesforce features such as Reports, Dashboards and Activity Management. This User Guide contains links to Salesforce tutorial videos for some of these common features. While these are orientated towards sales examples, the features explained are very relevant.

Support

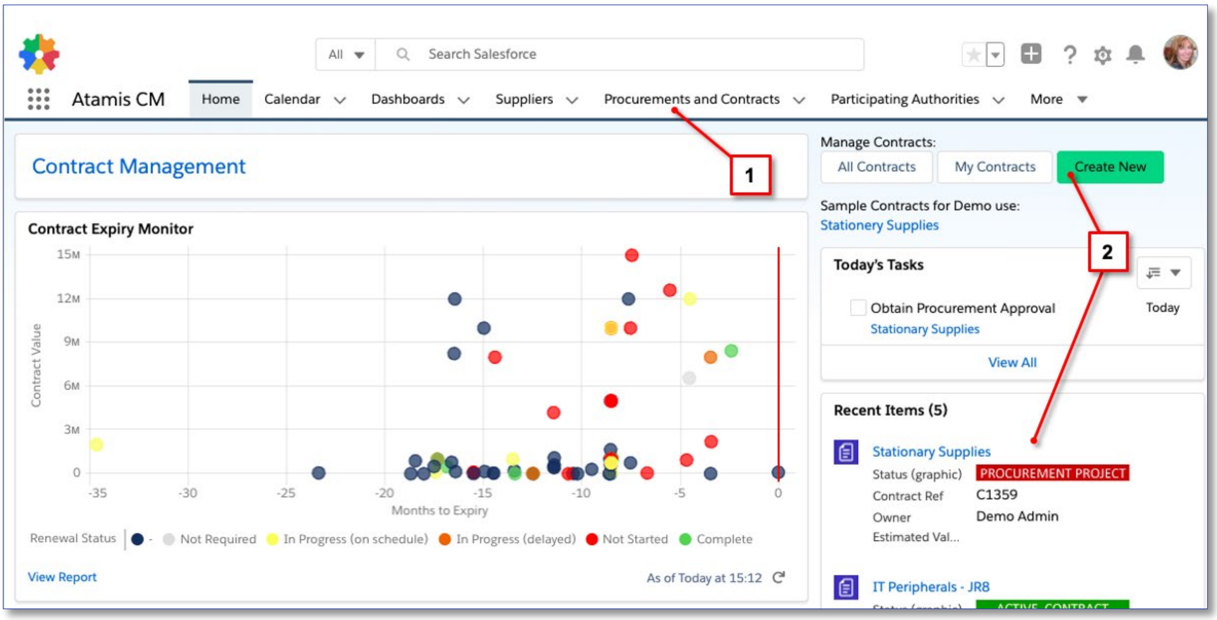
For end user support, please contact **support@atamis.co.uk,**.



Number	Description
1	**Navigation Panel**: this has a series of Navigation Items (often called tabs, but in this guide, the term 'Tabs' is used to describe the tabs within a record page, e.g. a Supplier) Use the drop-down arrow to select recently-view items and lists. Drag and drop Navigation Items to suit your preferences.
2	**Search:** a powerful Search engine that looks within the text of documents as well as all system records.
3	**Favourites:** Bookmark any page, record or report in the system by clicking on the star. Use the drop-down arrow to view you Favourites.
4	**Global Actions**: Quick access to create a Task, send an Email, etc.
5	**Help**: primarily help relating to generic Salesforce features
6	**Setup**: you may have access to view some system settings but only System Admin users and users with delegated User Administration rights can use this area
7	**Notifications**: a list of current Tasks and Approval Requests; new Notifications are highlighted in red as soon as they are assigned to you
8	**Profile**
9	**App Launcher:** use to locate other modules and other custom objects that don't appear as Navigation Items (e.g. Cost Centres, or Categories) by using Search Apps and Items. If your organisation has other Salesforce Apps, they are also listed here.

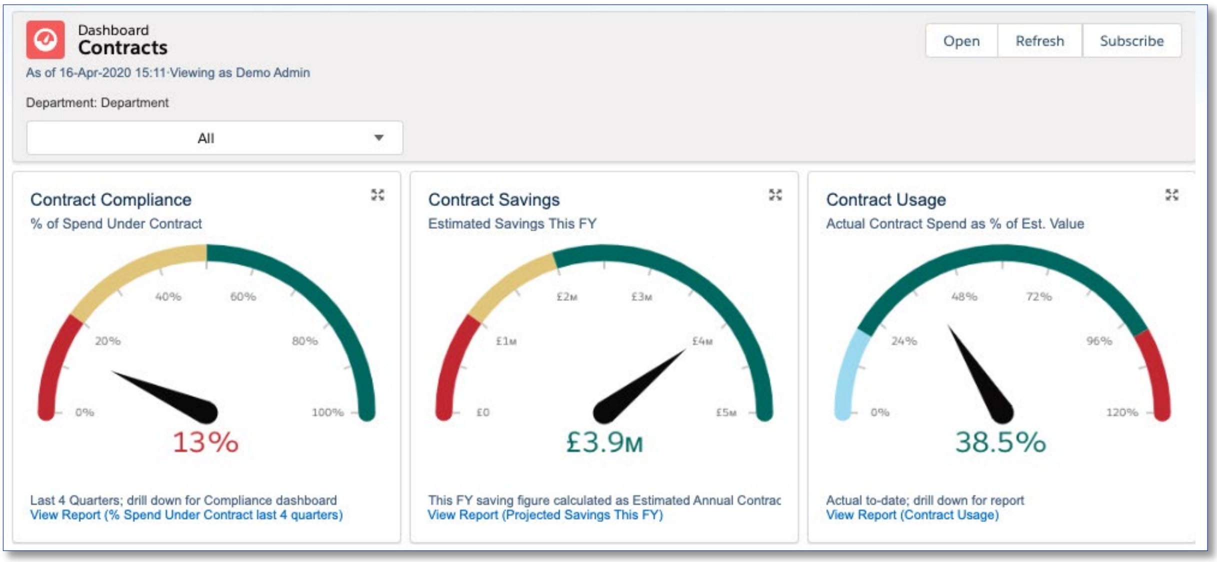
Home Page

Home Pages are normally customised by Atamis for each client and even for different User Profiles. A typical Home Page for CM users is shown below:



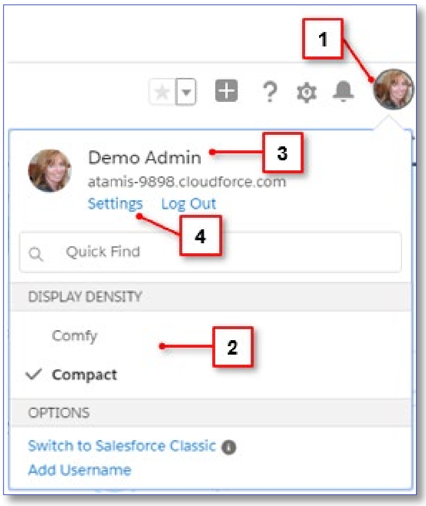
Number	Description
1	The Navigation Items have the following functions in Atamis 3.0: • Dashboards contains graphical snap-shot representations of your procurement data, plus your own custom Dashboards • All other Navigation Items (Suppliers, Contracts, etc.) provide access to data records, some of which may be modified depending on your access rights • Click **More** to access other Navigation Items that don't fit on the page
2	The default **Home Page** contains a set of components such as Expiry Monitor Charts, Quick Links, Recent Item panel or Tasks. Your Home Page will depend on what User Profile you have been given.

Home Pages frequently include Dashboards such as this:



Dashboards graphically summarise data that is held in reports. To view the detailed data, click View Report at the bottom of a Dashboard component. Click on the icon to expand each Dashboard Component and use your left and right cursor keys to page through other Components in the Dashboard.

Customising Your Profile and Personal Settings*



Number	Description
1	Click on your **User Profile** at the top right to display profile options.
2	The **Display Density** gives you the option to change the appearance of fields on a page The Comfy option gives a less-cluttered appearance and the Compact option allows you to have more information on the screen. Some users that previously used the Classic interface will have the option here to Switch to Salesforce Classic while getting familiar with the Lightning interface.
3	• Click on your User Name or Profile icon to access your Personal Details page. From here you can: • Upload your photo • Indicate that you are Out of Office • View or update custom fields on your User Profile such as Approval rights • Post updates to your colleagues using the Salesforce Chatter feature (referred to as the Discussions Forum elsewhere in Atamis pages). Posts will be visible to all internal system users, not Supplier Portal users. You can also see who you are Following and who is Following you.
4	Click Settings to open Personal Settings options including:

	Update your name, phone number, email and address by selecting Personal Information • Reset your own password by selecting Change my Password • Delegate approval rights by selecting Approver Settings • Control email preferences including Email Signature and whether you receive email alerts when files you're subscribed to are updated (default is Yes) by selecting Email > My Email Settings • Control email preferences from Salesforce Chatter (Atamis Discussions) by selecting Chatter > Email Notifications • Update preferences for Task reminders by selecting Calendars & Reminders > Activity Reminders.

Access Rights

Users of all Atamis systems implemented before January 2015 used a single Licence Type, now referred to as the Standard Licence Type, and these will remain effective for the full duration of the agreed contract term. Since January 2015 users have had the opportunity to benefit from additional features by upgrading to other Licence Types either mid-way through a contract term or at renewal.

Licence Types

There are four Licence Types: Standard, Enhanced, Advanced and Power. The Standard Licence Type is intended for users requiring basic Spend Analysis features, while the others provide for more features. A summary of the features available with each Licence Type is summarised below.

Features Available	Standard	Enhanced	Advanced	Power
Any ONE from SA, PM, TM, CM, SRM and full read-only*	✓	✓	✓	✓
Create and save custom reports	✓	✓	✓	✓
Full search facility	✓	✓	✓	✓
Pre-Configured Home Page	✓	✓	✓	✓
Spend Analysis Quick Reference Demo	✓	✓	✓	✓
User Guide & Training Exercises	✓	✓	✓	✓
Roadmap to Savings Guide	✓	✓	✓	✓
Any TWO from SA, PM, TM, CM, SRM and full read-only*		✓	✓	✓
Create/edit List Views		✓	✓	✓
Organise report sharing		✓	✓	✓
Create dashboards		✓	✓	✓
Create tasks/events and use calendars		✓	✓	✓
Attach documents		✓	✓	✓
1GB file storage (total, not per user)		✓	✓	✓
Any THREE from SA, PM, TM, CM, SRM and full read-only*			✓	✓
System Mapping Rules			✓	✓

Create new report/dashboard folders			✓	✓
Full access to SA, PM, TM, CM, & SRM Modules				✓
Contract KPI definition and setup				✓
Use of Import Wizard				✓
Category & Quadrant Analysis Tools				✓
Cost Centre Restructuring Tool				✓
Additional data rows and file storage options				✓

*** Module Definitions**

SA - Spend Analysis: Full visibility of Expenditure data with approx. 200 standard reports and dashboards, full reporting capability (drill-down, customise, advanced report builder, export, create charts and save/share reports), Spend Mapping Tool using supplier rules, Supplier De-duplication Tool, Contract Register and Basic Contract Compliance Rules for data segregation options to restrict visibility by area. This module also gives users access to the Supplier and Contract Standard Page Layouts with instant report generators, Duedil integration and supplier size (SME), turnover, dependency risk and location

PM - Pipeline Management: Corporate Programme Register, Pipeline Planning, Resource Forecast and Capacity Planning, Contract Dependency, Programme-Project Structures, Risk Register, Document Management, custom fields and page layouts and full audit trail

TM - Tender Management: Task-driven procurement project management via Project/eSourcing Page Layout: create Projects from Templates, manage/use Requirements incl. auto-scoring set-up, Evaluators, Procurement Team Members, suggest/invite Suppliers Bidding, publish via Tender Opps Site, Contracts Finder and OJEU, secure document exchange, respond to clarification Questions, secure tender box opening, evaluation team scoring, contract approval workflow, auto-create contract record, specialist procedures support, custom fields, full audit trail (eSourcing features also require Portal Licence)

CM - Contract Management: Corporate Contract Register via Enhanced Contract Page Layout including Activity Management, Workflow and Scheduling, Document Management (full version control option), Risk Impact Assessment, Risk Register, Contract KPIs (also requires SRM module access), Contract Savings, Variation/Extension/CCN Orders, Advanced Contract Compliance Rules, procurement procedure compliance, CSR/Social Value, Contract Integration Email Service, custom

fields and page layouts, data segregation options to restrict visibility by area, full audit trail.
SRM - Supplier Relationship Management: Enhanced Supplier Page Layout including Contact & Activity Management, Workflow and Scheduling, Document Management, Advanced Spend Mapping Tool (custom rules), Contract KPIs (also requires CM module access), supplier compliance tracking and risk segmentation, custom classifications, supply chain builder tool (secondary suppliers), innovation management, supplier portal for secure sharing of supplier profiles and documents (also requires Portal Licences), and full audit trail. This module also provides access for Local Authority clients to Local/SME analysis tools and to the Care Quality and Local Potential services.

User Profiles

Each user is assigned a Profile in Atamis which determines the user's permission levels such as which tabs are visible and which data is editable. Only certain Profiles are available depending on the Licence Type the User holds.

Permission Sets

Users requiring unique access to specific objects, fields and features can be granted Permission Sets. Contact Atamis Support if you identify a need to use Permission Sets.

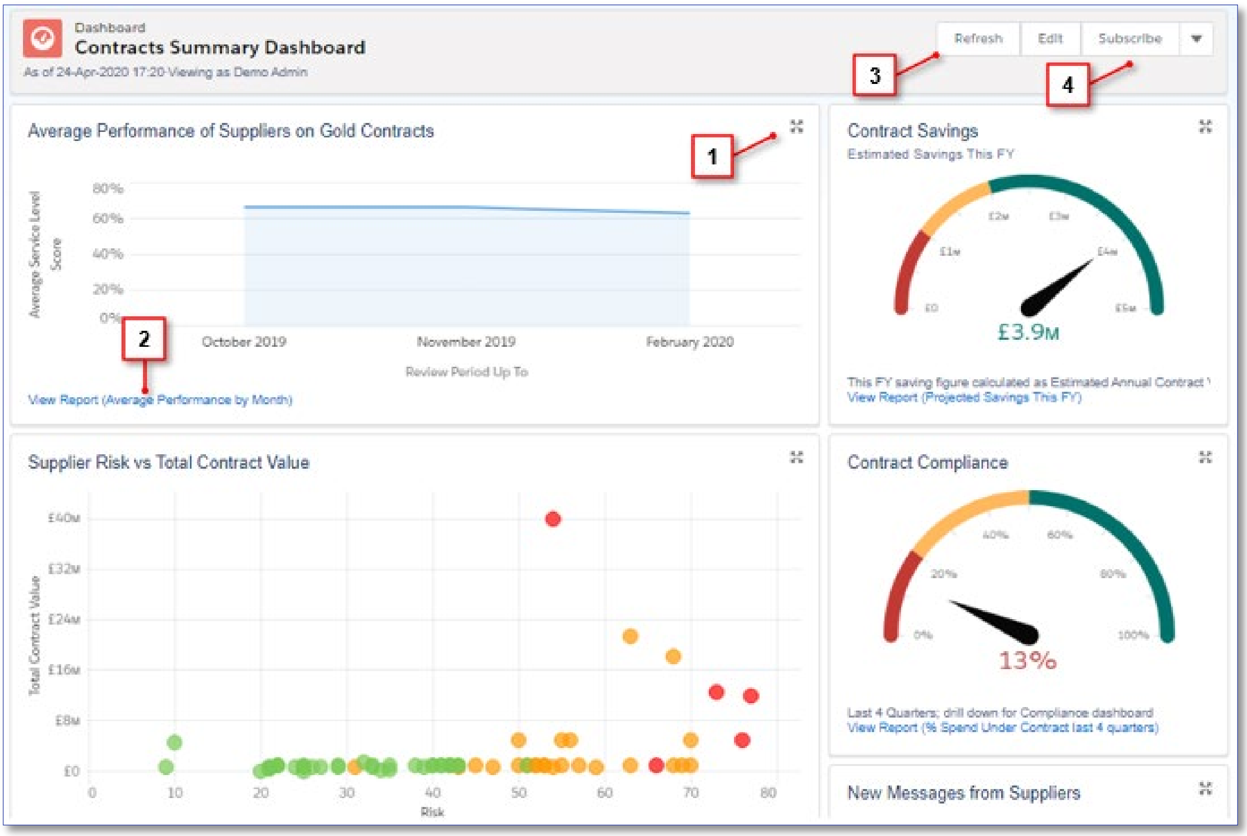
Atamis Core Features

Dashboards

Dashboards provide a useful graphical summary of data pulled from any number of Atamis objects such as Projects, Contracts, KPIs or Expenditure. Each Dashboard Component – dial, line graph, table, etc. – is derived from a pre-defined Report. To access the detailed data, from the bottom of any Dashboard Component, click View Report.

Using Dashboards

Use the Dashboards tab (Navigation Item) to locate and open a Dashboard.



1 Expand a Dashboard Component to full screen and click right and left arrows, or use the cursor arrows on your keyboard, to page between Dashboard Components. Click on the  icon to download a Component as an image.

2 Click **View Report** to access the underlying Report.

3 Dashboards represent a snap-shot of the data at a fixed point. Dashboards can be configured to auto-refresh, but if the data is out of date a message will indicate that you may want to Refresh.

4 Click **Subscribe** to get the dashboard emailed to you on a regular basis. Watch this 3-minute Salesforce video for a good overview on Subscribing to Dashboards and Reports.

Number	Description
1	Expand a Dashboard Component to full screen and click right and left arrows, or use the cursor arrows on your keyboard, to page between Dashboard Components. Click on the icon to download a Component as an image.
2	Click **View Report** to access the underlying Report.
3	Dashboards represent a snap-shot of the data at a fixed point. Dashboards can be configured to auto-refresh, but if the data is out of date a message will indicate that you may want to Refresh.
4	Click **Subscribe** to get the dashboard emailed to you on a regular basis. Watch this 3-minute Salesforce video for a good overview on Subscribing to Dashboards and Reports.

Creating Dashboards

For a good overview, watch this 5-minute Salesforce video on how to Create a Dashboard, or follow the steps below:

1 If necessary, create the source reports containing the data you want to display.

Tip: Be sure to store these reports in folders that intended dashboard viewers can access

2 From the Dashboards tab, click **New Dashboard.**

3 Name the dashboard.

Optionally, provide a short description. Then, place the dashboard in a folder. Private Dashboards is the default folder.

4 To add a component to the dashboard, click + Component.

a) Choose a source report for the component, then click Select.

b) Customize how the component displays data, then click Add.

c) Arrange and resize the component as necessary.

d) To edit an existing component, click the pencil icon ( ). To remove a component, click the X icon ( ).

5 To add a filter to the dashboard, click + Filter.

a) From the Field drop-down, select a field to filter on. The drop-down shows fields that can be used to filter all the dashboard's components. If there are equivalent fields for your selection, hover over the info icon ( ) to see them.

b) Give the filter a Display Name to identify it. If the filter has many equivalent fields, we consider using a name that works for all components.

c) Assign values to the filter by clicking Add Filter Value.

6 To specify who people view the dashboard as, click the gear icon ( ) to open the Properties menu.

a) Under Name, optionally rename the dashboard.

b) Under Description, optionally describe the dashboard.

c) Under Folder, optionally move the dashboard into another folder. To switch folders, first click the X icon ( ), then select another folder.

d) Under View Dashboard As, choose who people view the dashboard (and all source reports) as. People could see more or less data than they normally see elsewhere in Salesforce. Be careful not to reveal sensitive information to too broad an audience.

i. Me — People view the dashboard as you.

ii. Another person — People view the dashboard as whomever you choose. You are the default person. To choose someone else, click the X icon ( ).

iii. The dashboard viewer — People see data as themselves, according to their own access to data. These types of dashboards are often called dynamic dashboards.

Your system can have up to 5 dynamic dashboards. Take note of these dynamic dashboard limitations:

- Dynamic dashboards don't support following components.
- You can't save dynamic dashboards in private folders.
- You can't schedule refreshes for dynamic dashboards. They must be refreshed manually.

Let dashboard viewers choose whom they view the dashboard as — Optionally, select **Let dashboard viewers choose whom they view the dashboard as** to enable a reader with appropriate user permissions to choose who they view the dashboard as. With the "View My Team's Dashboards" user permission, the reader can view the dashboard as themself or as anyone beneath them in the role hierarchy. With the "View All Data" user permission, the reader can view the dashboard as anyone.

- Click **Save**.

7 To customize dashboard theme or colour palette, open the Properties menu by clicking the gear icon ( ).

Customize colours in your dashboard by choosing a light or dark theme and one of 14 colour palettes. Themes and colour palettes help you organize and curate data in your dashboard. For example, highlight a set of summary metrics by giving them a dark theme and setting them against a light-themed dashboard. This feature is new in Lightning Experience.

- From Dashboard Theme, choose Light or Dark to set the theme for the entire dashboard. To set a single component's theme, edit the component by clicking .
- From Dashboard Palette, choose one of 14 colour palettes. Wildflowers is the default colour palette. If you need an accessible colour palette, choose Mineral.
- Click Save.

8 To switch between a 12-column and 9-column layout, open the Properties menu by clicking the gear icon ( ).

9 Under Dashboard Grid Size, choose 12 columns or 9 columns.

10 Click **Save**.

11 Click **Save**, then click **Done**.

Reports

This overview section explains how to:

- Use Reports
- Create and Customise Reports
- Organise and Find Reports

Using Reports

There are hundreds of standard reports and dashboards in Atamis 3.0. Reports are organised into folders which are made available to other users with Report Folder Sharing settings.

Use the Reports tab (Navigation Item) to locate a Report and click on it to open.

Unlike Dashboards, Reports are dynamic, so every time you run a report, it will be pulling in the latest data. You can also create and save your own Reports.

All reports are based on a Report Type which defines the set of fields that can be used to analyse your data (see next section for more details).

Note that if you click on a blue hyperlink in a report, e.g. a Supplier's name, then you will be taken away from your report to another page. You should however be able to return to the Report using the Back button on your browser.

Changing the Time Frame on Atamis SA Reports

The Time Frame options, available on the Filters section on the report page, enable you to alter the time frame of a spend report.

The Period Field provides a drop-down list of all possible dates to report on.

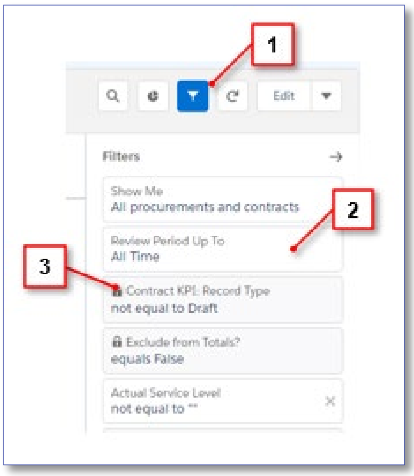
The Range can either be chosen from a drop-down list, providing options such as current financial year, 2 FY Ago, etc. Alternatively, a date range can be customised by choosing Customize in the Range field and manually entering From and To date in the boxes provided, or choosing the dates from the calendar that will appear when clicking on the boxes.

To report on data from a particular date up to the current day, select a From date and leave the To box empty. This will automatically assign the To date to the current day.

Filtering Data

To filter your data on reports that have Row Groupings, select one or more rows on your report and then click Drill Down (located as a button on the top right corner on the report).

To change other filters from the report:



Number	Description
1	Toggle the filter options
2	Click on a filter option or click on the X to clear it
3	Filters with a padlock cannot be changed

NOTE: If you still cannot set the filter you need, please refer to the section on Creating and Customising reports.

Exporting your Data

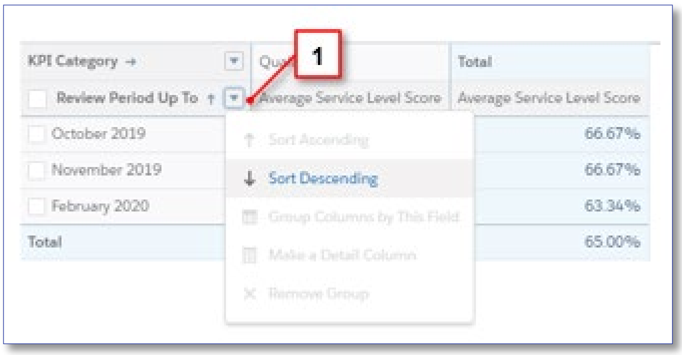
There are two ways to export report data, for example to Excel, using the buttons located above the report data.

To export the summarised data as it appears on the report page, click Export and from the pop window, select Formatted Report, followed by Export.

To export all records in tabular format, select Details Only. If you select the Excel format, once you have downloaded the file, we recommend you use Save As in Excel to save in the required Excel version.

Sorting Reports

To sort Tabular reports, click on column headings.



Number	Description
1	To sort Summary reports, choose from Sort Ascending or Descending or Sort By

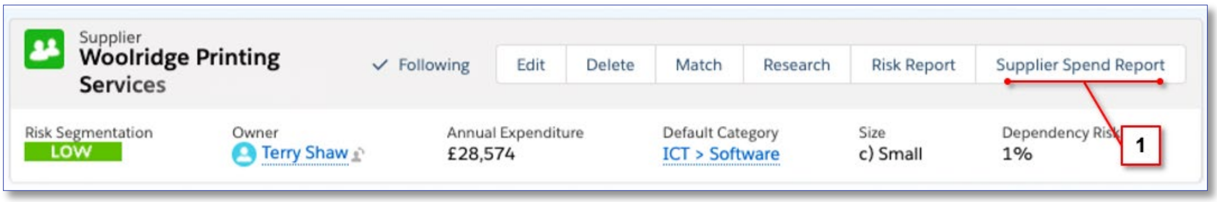
Exception Report Notifications

It is possible to have reports emailed to you when exception conditions are met. To do this run the report and click Subscribe. From the Configuration Page you can specify:

- Whether you are notified every time the conditions are met or only the first time. If you set this to Only the First Time, the subscription will be de-activated once it has run once.
- The logical conditions to be fulfilled, for example Monthly Sum of Expenditure Greater Than £20,000
- The Frequency with which the system checks if the conditions have been met. Note that you will only receive a notification when the Conditions are met.
- The 'Actions' Section should be set to 'Send Email Notification', and the 'Active' checkbox should be checked.

Instant Reports

Instant Reports provide a quick mechanism for generating pre-filtered reports from record detail pages. For example, on the Supplier Detail page:



Number	Description
1	1 Click Supplier Spend Report to run a spend analysis report filtered by the Supplier Name. Note that if you have duplicate supplier records, spend data from all suppliers will be included in the report provided that the Supplier Name is identical on all records.

The following default Instant Reports are available:

Tab	Instant Report
Suppliers	Supplier Spend Report
Projects	Evaluation Matrix Report
	Cumulative Scoring Report
Contract	Contract Spend Report
	Contract KPIs Report
Category	Category Spend Report
	Category Level 1 Spend Report
Department	Department Spend Report

Creating and Customising Reports

For advanced users wanting a good overview of creating and customising Reports, watch this 4-minute Salesforce video on **Building Reports** or follow the steps below:

1. From the reports tab, click **New Report**.

2. Choose a report type, then click **Continue**.

The report type you choose determines which records are returned and which fields are available in your report. See Atamis Report Types for further details.

3. The report opens in edit mode, and shows a preview.

In edit mode, add and remove fields to your report as columns, group rows and columns, filter report data, and show or hide a chart. Customize your report until it shows exactly the data that you need.

4. To add a column to your report,

- Choose a field from the *Add column...* picklist.
- Alternatively, expand the *Fields* pane, then drag-and-drop a field onto the Columns list or directly onto the report preview.
- To remove a column from your report,
- From the Columns list, find the column you want to remove. Then click ✕.

- Alternatively, from the preview pane, find the column you want to remove. Click | **Remove Column**.

- To remove all columns from your report, from the Columns list, click .

Removing a column from your report doesn't delete the field. If you remove a column, but want it back, add it again.

5 To summarize a column in your report,

- From the preview pane, find the column you want to summarize. Click | **Summarize**.

- Choose how you want to summarize the column: `Sum, Average, Max, Min.`

6 To group records in your report,

- Choose a column from the *`Add group...`* picklist under GROUP ROWS.

After grouping a row, you can group a column by choosing a column from the *`Add group...`* picklist under GROUP COLUMNS. Group up to 2 rows and 2 columns.

After grouping records by a date field, you can also customize date granularity. First select the date field you want to group your report by. Then, for *`Group Date By...`*, apply a calendar or fiscal period.

- Alternatively, drag-and-drop a column from the Columns list or from the preview pane onto the GROUP ROWS or GROUP COLUMNS list.

- Alternatively, from the preview pane, find the column you want to group. Click | **Group Rows by This Column** (or **Group Columns by this Column)**.

After adding a group, you can show or hide detail rows, subtotals, and a grand total by toggling switches at the bottom of the preview pane.

To ungroup records in your report,

- From the Groups list, find the group you'd like to ungroup and then click ×.

- Alternatively, drag-and-drop the group onto the preview pane.

- To ungroup all groups in your report, from the Groups list, click .

Unless you drag-and-drop the group onto the preview pane, removing a group also removes the column from your report. If you still want to show the column, add it back.

7 To filter records from your report, click FILTERS.

Depending on which report type you chose, your report has between two and four standard filters which are applied by default. Most templates include a Show Me filter and a Date filter. The Show Me filter scopes report results around common groups, like "my opportunities" or "all opportunities". The Date filter scopes results around a date field, like "created date" or "closed date".

- To add a field filter, choose a field from the `Add filter...` picklist.
- To edit a filter, including standard filters, click the filter.
- To remove a filter, click the × icon on the filter.

For more information about filtering reports, see **Filter Report Data** in the Salesforce help.

8 To add a chart, first add at least 1 group, then click Add Chart.

- A chart appears. To customize the chart, click . Change the chart type, colour palette, and more.
- To show or hide the chart, click .
- To remove the chart, click | **Remove Chart**.

9 Click Save. If you're creating a brand-new report, give it a name. Optionally, give it a description. With access and sharing in mind, save the report in an appropriate folder.

10 To view complete report results, click Run.

NOTE: The Report Builder area (Exit) displays *sample data onlyl.* Click **Run Report** to see the full report.

Atamis SA Reports

For an in depth guide on how to customise Spend Analysis reports, please refer to the Training Exercises or Atamis Video Tutorials for examples of Spend Analysis reports for clients using the Classic interface.

Report Types

This section relates only to users with advanced reporting requirements.

Report Types determine which fields are available for use within a Report. The name of a Report's Report Type can be seen at the top left of the Report Builder. There are some Custom Report Types included in Atamis which provide a useful subset of commonly used fields.

These are:

Custom Report Type	Usage	Fields/Objects
Spend Analysis	For most Spend Analysis reporting (including flexi-fields)	Most Expenditure fields plus some Supplier, Category, Department, Cost Centre and Contract fields
Contract Analysis	For analysing contract savings and expiry dates	Contract object only
Supplier Analysis	Analysis of suppliers using Default Category and Contracts	Suppliers, Categories and Contracts (no Expenditure fields)
Supplier List	Analysis of Suppliers using just supplier fields	Supplier object only
Supplier Report Under Analysis	For identifying multiple levels of Report Under	Supplier object only
Suppliers and Custom Rules	All suppliers with custom rules where they exist	Suppliers and Custom Mapping Rules objects

If you find that the Report Type does not contain the field you require to generate your report, you can use some of the Standard Report Types. There are many of these, and they will include *all* fields from an object. If you click **New Report...** and expand the folder for `Other Reports` you will see the full list. Some examples are given below:

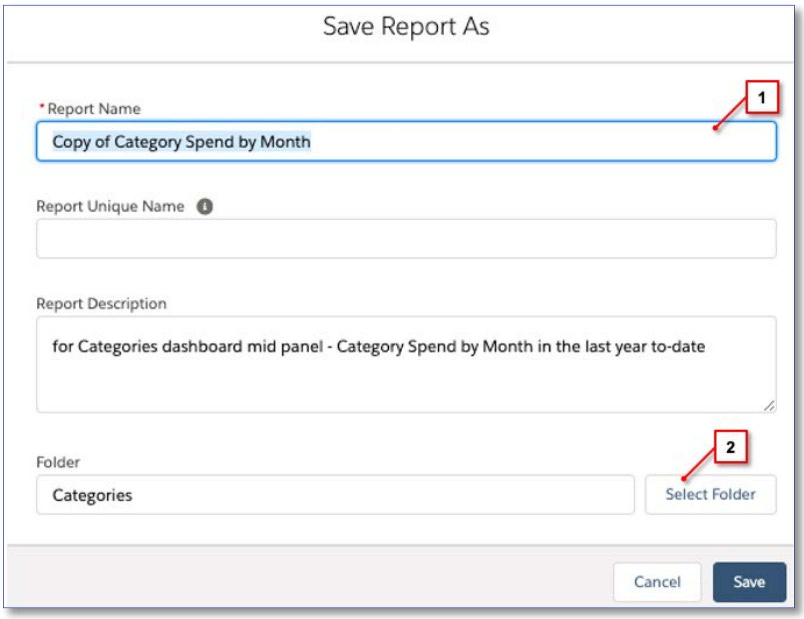
Standard Report Type	Fields / Objects
Suppliers	All fields from the Supplier object only
Expenditure with Category	All fields from the Expenditure and Category objects
Contracts with Contract KPIs	All fields from the Contract and Contract KPI objects
Supplier History	The audit trail of all changes made to key fields on the Supplier object
Supplier Report Under Analysis	For identifying multiple levels of Report Under
Suppliers and Custom Rules	All suppliers with custom rules where they exist

Note that for convenience, the Expenditure object in Atamis SA has been created with some fields that are pulled in from other objects e.g. *Supplier Original Name* (from the Supplier object), *Category Group* (from the Category object), or *Contract Start Date* (from the Contract object).

Organising and Finding Reports

Saving Reports

Standard reports in Atamis 3.0 cannot be overridden by users (except by System Administrator users). To create a copy of a modified standard report click on ▾ next to **Edit** button, and from the list select Save As.



Number	Description
1	Enter a Report Name and a Description
2	Select a **Report Folder** where the report will be saved to, and click **Save**

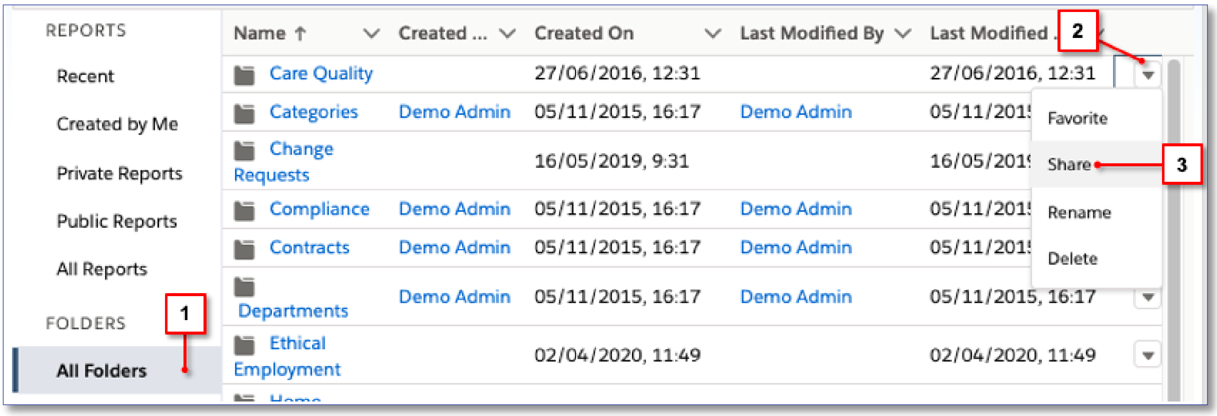
Your User Profile and the Report Folder Sharing settings will determine which Report Folders you and other users can access. Contact support@atamis.co.uk for help with setting up custom folder access requirements.

Reports saved in the folder Private Reports cannot be seen by any other user, including Atamis Support users.

Creating and Sharing Report Folders

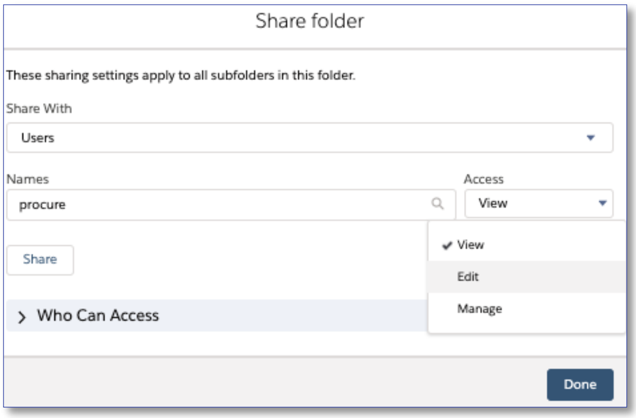
To Create or Share Report Folders users require a Licence Type of Advanced User or above.

To create a new folder, click New Folder, enter the name of the folder and click Save.

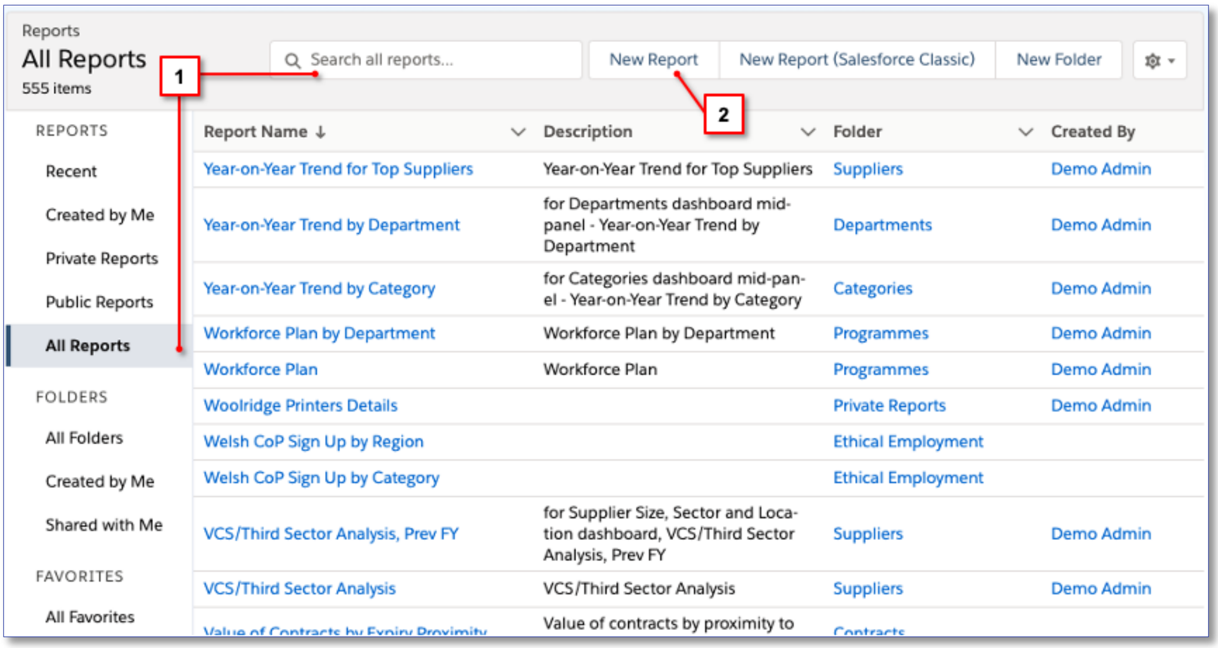


Number	Description
1	To control which users can view or modify reports in a folder, click on All Folders. This action will bring up a list of all report folders that you've created or are shared with you
2	Click on the down arrow on the line of the folder
3	Select **Share** from the drop down list

The following window will allow you to search for users on the system and you can define the level of access to the folder: View, Edit or Manage.



Finding Saved Reports

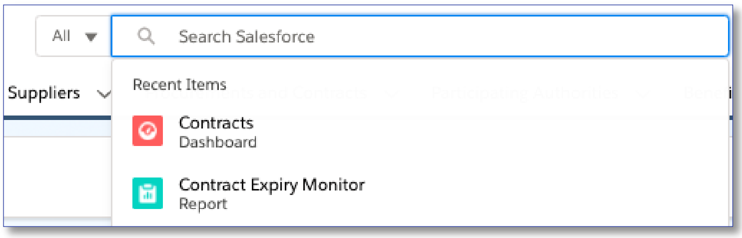


Number	Description
1	To find a report, tyupe part of its name in this search box. Note: results are limited to the folder selected on the left
2	To create a new report, click **New Report** Select the Report Type and click **Create**

Searching

For a good overview of the Search function, watch this 3-minute Salesforce video on Search.

A Search box is available at the top of the page from which Search and Recent Items can be accessed.



Atamis configures which objects can be searched to ensure search results are optimised. Click in the area to the left of the search box to narrow your search to specific Atamis custom objects. Select Files to find documents.

Note that the search engine will look inside the content of Word, PDF and other files, but not scanned images.

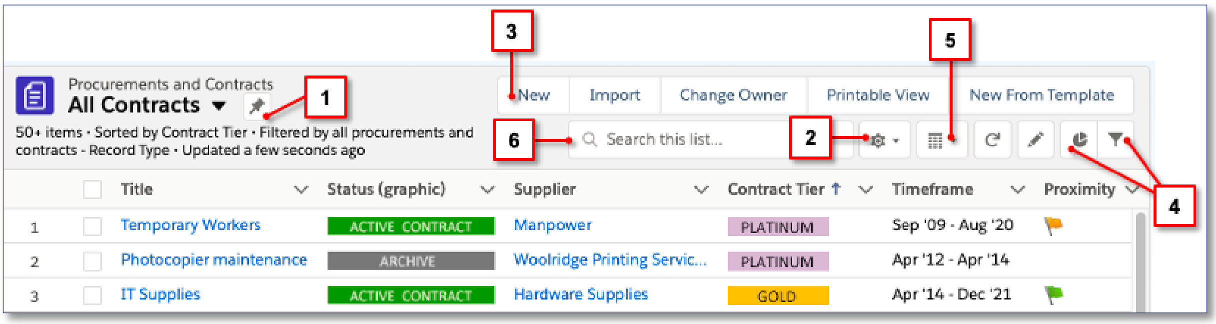
Search options are also available in List Views and in Reports.

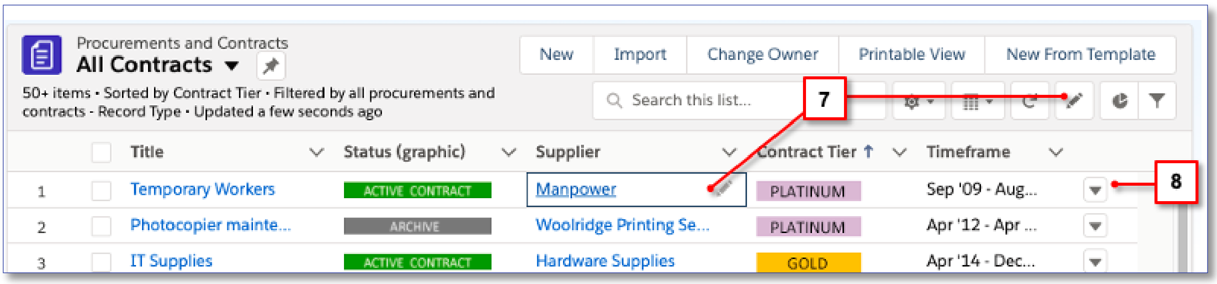
Customising Views

List Views allow you to customise the data and columns displayed in Navigation Items. Users with appropriate permissions can create and modify any number of List Views and share them with other users.

For a good overview of List Views, watch this 3-minute Salesforce video on Working with List Views.

In a list view, you see only the data that you have access to. You can see records that you own, have read or write access to, or are shared with you. List views also include records owned by or shared with users in roles below you in the hierarchy. The fields you see depend on your page layout and field-level security settings.



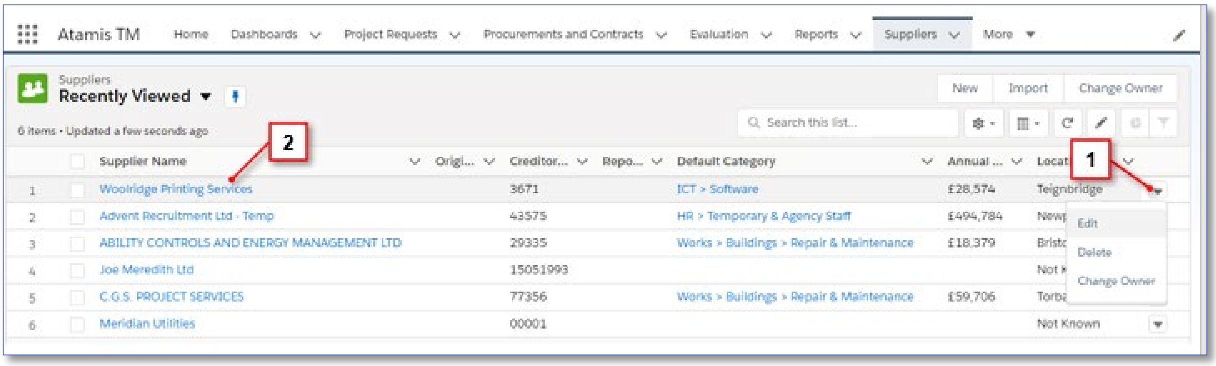


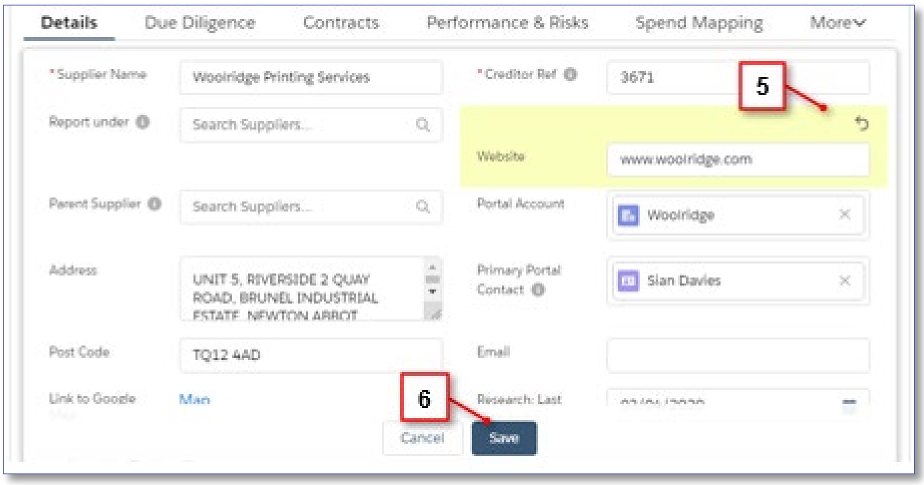
Number	Description
1	Select a list view from the dropdown menu. Pin a list to set it as default
2	Edit delete, or create a list using the List View Controls menu (locatable with the cog)
3	Create records directly from a list view
4	View a list in different ways: with the pie chart icon, you can view list datea, and refine which records are displayed using filters

5	(Not available on all objects): Toggle between the standard list view grid and the Kanban board, a visual way to monitor the progress using a status or picklist field
6	Search a list view for the data you need
7	(not available on all objects): Edit a field directly from a list view in the list view header or next to a record detail
8	Edit or delete a record by selecting the dropdown icon next to it

Modify and create list views from your record home page with List View Controls ⚙. To change and reorder the columns displayed in a list view, select **Select Fields to Display**. Fields correspond to columns in the final list view.

Editing Data





Editing Records

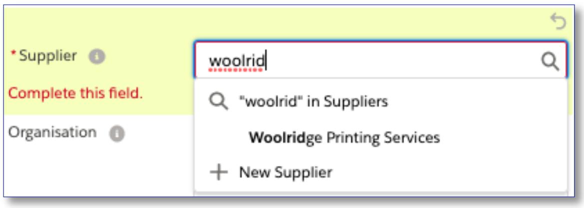
To edit a record access from a List View:

Number	Description
1	Select the recors' action menu using the arrow at the far end of the row and click **Edit**
2	OR select any record shown in blue hypertext and click **Edit** from the button bar

3	OR when viewing a record page, click on the pencil icon to edit
4	Hover over the information icon for help with using a field
5	Before you save, fields you have edited are highlighted in yellow. To undo your change, click on the **Undo** icon and/or click **Cancel**
6	Click **Save**

Editing Look-up Fields

Fields such as Supplier, Contract, Department, etc. need to be selected from a lookup list when they are edited:



This feature requires you to have pop-ups enabled on your browser for this site.

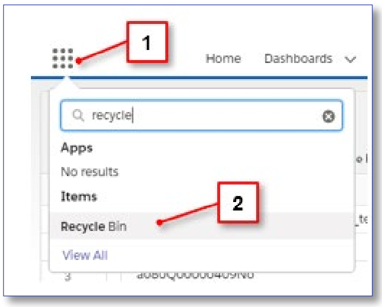
Type the start of the name of the record and select from the search results or use the picker icon for a fuller search. Remember to click **Save**.

Mandatory Fields

Mandatory fields are denoted with a red asterix to the left of the field, such as in the example above. Other fields may be mandatory based on specific data-criteria that are specified in a Validation Rule. These don't have a red asterix, but may prevent you from saving changes.

Recycle Bin

When records and files are deleted, they are moved to a Recycle Bin and permanently deleted after 15 days. To restore a deleted item:



Number	Description
1	Click on the **User** icon at the top right of the page
2	Click on your **Username** to display your User page. Your full Chatter Feed is normally displayed at the bottom of your User page

Posting Messages and Files to Internal Colleagues

Posts made on an object record, e.g. a Project, will be visible to any internal user that can view the record. Only users that you tag (using @username) and those that are Following the record will receive an email notification of your Post.

Number	Description
1	Tag users by using @
2	Leave this as the default to keep the communication internal
3	Optionally attach files

Posting Messages and Files to Supplier Users Registered on the Portal

Posts are only visible to Suppliers if you select **All with access** in Step 2 above when you post AND the supplier has access to the page you're posting from – for example their Supplier page or Portal Contact page. To ensure a supplier user is notified of your Post, tag them in the Post as shown above.

Requesting a File from a Supplier

You can use Discussions to receive files of up to 2GB from Suppliers in a secure manner (subject to your organisation's total file storage allowance). The recommended approach for requesting files is:

1. From the Discussion tab on the Supplier page, Post an update to request the file and:

    a) Tag the Portal Contact user

b) Ask them to reply to the Post using *Comment*

Note that the Portal Account field on the Supplier page needs to be entered or the Portal Contact won't be able to see the Post.)

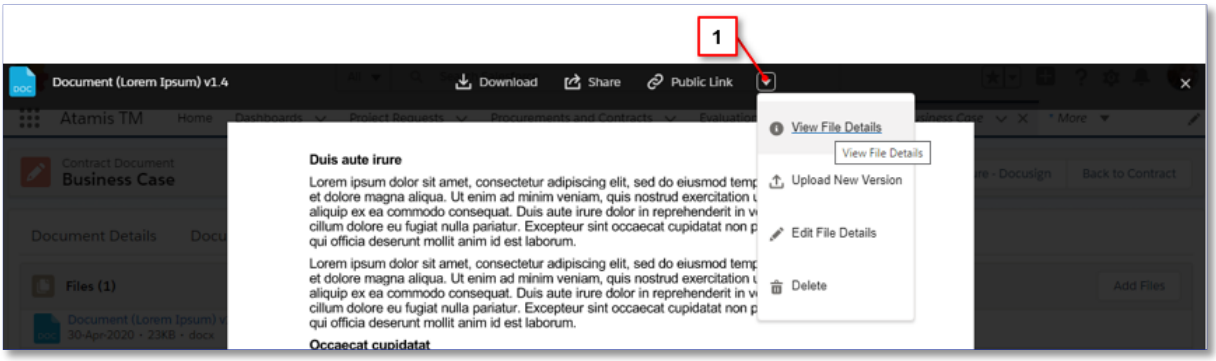
2 The Portal Contact will receive an email alert with a link that prompts them to log in and attach a file by reply

Following Records, Files and Other Users

As with social media platforms, you can Follow items to receive notifications of Posts and changes to data and files in the system. Simply click **Follow** or **Unfollow** where you see this button on the page:

You'll see a full list of everything you're following and who's following you by going to your User page: select your User icon at the top right of a page, then click on your **Username.**

To Follow a File and receive notifications, for example, when a new version is uploaded:

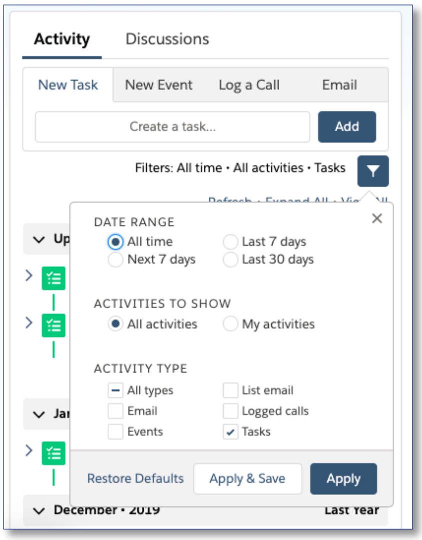


Number	Description
1	Preview the File and from this menu, choose **View File Details,** then click **Follow**

Activity Management (Activity Tab)

Tasks and Events

The Activity Management features provided within the Salesforce.com platform can be utilised to schedule Tasks and Events. Events have a start and finish time, e.g. a meeting, while Tasks just have a target completion date (the *Date*).



To add a Task or Event click either **New Task** or **New Event** in the Open Activities section of the Record Detail page. All activities will appear in a list. Click to apply filters to the list of tasks or events. Please see the Salesforce.com help pages for further information on:

- Managing Tasks
- Considerations in Using Events

When using these Help pages, you should refer to the sections relating to Salesforce Classic rather than Lightning Experience.

Atamis can configure a R-A-G field for you called *Status (Graphic)*. If used, the default logic for this flag is:

- Blank if Task Date is > 30 days away and Task is still Open
- Amber if Task Date is <= 30 days away and Task is still Open
- Red if Task Date is in the past and Task is still Open
- Green if the Task has been Closed (Completed)

Calendars and Outlook Integration

Events can be viewed in a Salesforce calendar. Please see the Salesforce.com help page on Calendar Views for further details.

Atamis can configure your system for two-way integration with Outlook. The setup for this integration may require approval from your IT Department as it requires you to install the Salesforce for Outlook Add-In. Contact support@atamis.co.uk to have this feature enabled. Further details on connecting to Salesforce in Outlook are available on this link: Connecting to Salesforce in Outlook

Files (Documents Tab)

The *Files* feature in Salesforce replaces and improves on the older features, *Notes and Attachments* and *Content Libraries*. All content uploaded using these legacy features are automatically available within Files.

The content of Files (Word, PDF, etc.) is automatically indexed for use in the *Search* feature.

Files on Atamis records are managed on a Documents tab which will be configured either in the main set of record Tabs, or in the Tabs on the right-hand section of the page.

Uploading Files from Your PC/Network

To upload a File, from the Documents Tab, either:

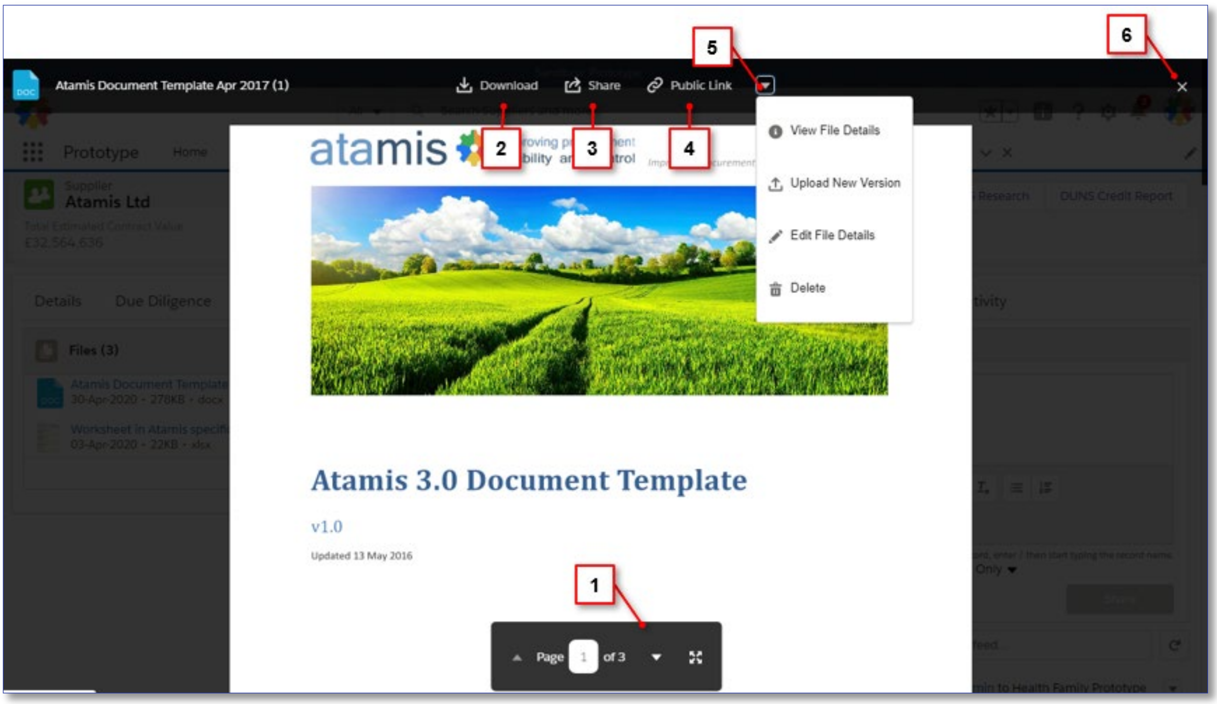
- Drag the file from another app and drop it into the Files area, or
- Click **Add Files**, then click **Upload Files** to select from your PC/Network

Linking Existing Files to a Record

To link a File that has been previously uploaded, from the Documents Tab, click **Add Files** and use Search Files to locate the File, then click **Add**.

Previewing, Downloading and Updating Files

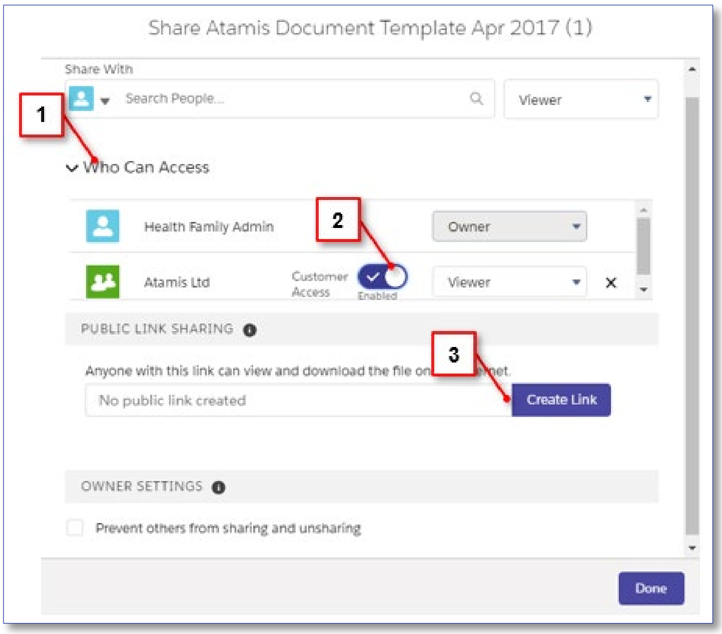
From the Documents Tab, click on a **File** name to display a preview:



Number	Description
1	Use the Preview options to view Full Screen and page through (available for PDF, Word, Excel, and some other file formats)
2	Click **Download** to download a local copy
3	Click **Share to control who can access the file**
4	Click Public Link to make the document visible to anyone without logging in and create a URL. NOTE: this makes the file non-secure, and this should not be done for sensitive files.
5	Use the menu options to view file details or upload new versions Click **View File Details** to display the number of Views and Downloads and access the ful file version history
6	To close the Preview, click on the X or press Escape on your keyboard

Sharing Files

Sharing settings will default to the users who can access the record that that File is linked to so do not normally need to be modified. To change sharing settings for a File, from the File Preview page, click **Share**:



Number	Description
1	Add additional users to share this file with Collaborators can make changes to the file description and upload new versions Viewers can only view the file
2	From the **Who can access** section adjust whether the relevant Supplier Portal User (displayed as customer) should have access
3	Click Public Link to make the document visible to anyone without logging in and create a URL. NOTE: this makes the file non-secure, and this should not be done for sensitive files.

Content Libraries

Clients choosing to use the legacy Content Libraries feature can refer to the following Help Pages for detailed guidance:

- Uploading Content to a Library
- Updating Content (with a new version)
- Using Related Content (e.g. to link Content to a particular Supplier)
- Searching for Content
- Updating Tags and other Content Details
- Subscribing to Content (to get email alerts when documents change)
- Setting up Library Members (to control who can view/update content)

Supplier Portal

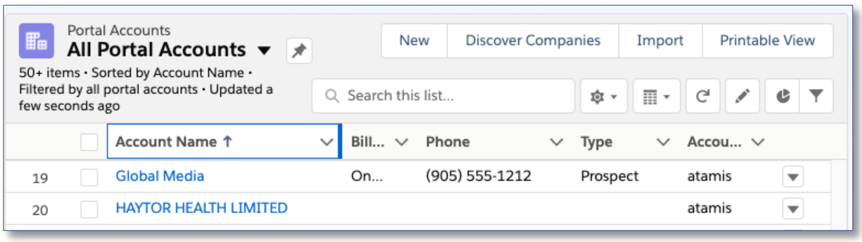
To make use of this feature you will need Supplier Portal Member Licences or Supplier Portal Login Licences.

Selected Suppliers can be granted access to the Supplier Portal by:

- Creating a Portal Account for the Supplier
- Adding one or more Supplier Contacts to the Portal Account
- Assigning an External Licence to each Supplier Contact
- Linking the Supplier record to the Portal Account

Create a Portal Account

To create Portal Accounts, you need to have a System Administrator Licence and have requested Atamis Support to activate the Supplier Portal.

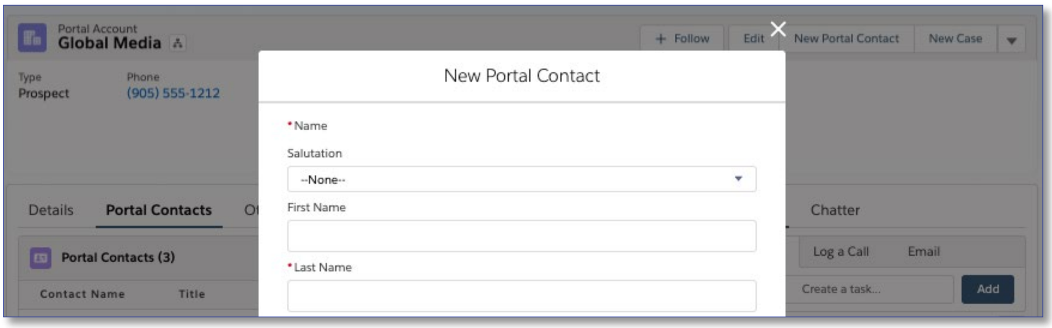


From the Portal Accounts tab click New, enter the Name of the Supplier (this does not need to match the supplier record exactly) plus any other details, then click Save. [Note that one Portal Account can be used for more than one supplier, for example if the Suppliers are all part of the same company group and you wish all Supplier Contacts to have access to all of the Supplier records.]

Next click Manage External Account and click Enable As Partner or Enable As Customer depending on your configuration. Note that the term ‘Customer’ here is generic to the Salesforce platform and for users of Atamis 3.0 the term Customer will always relate to Suppliers.

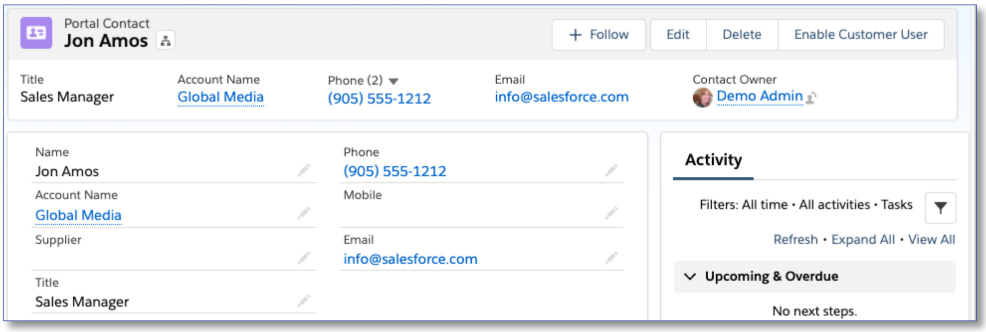
Add Supplier Contacts

From the Portal Account Detail Page, click New Portal Contact and enter the name of the Contact and their Email address plus any other details you wish to record. Repeat this step if there are multiple Supplier Contacts requiring access.

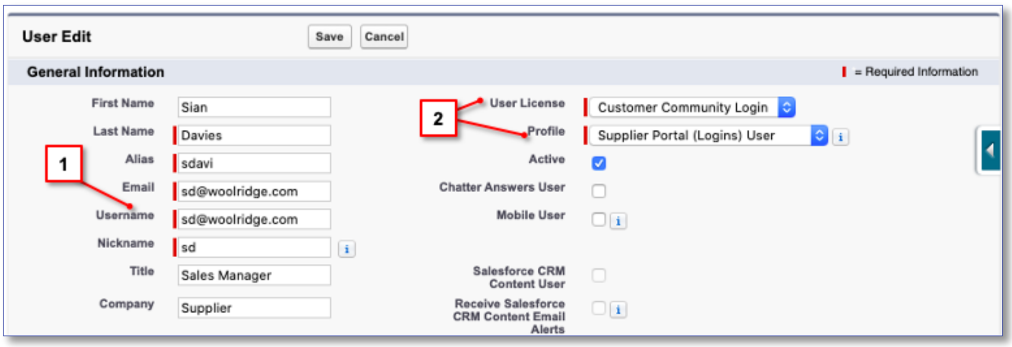


Assign Licences to Contacts

When you have added a Contact, click **Enable Customer User.**

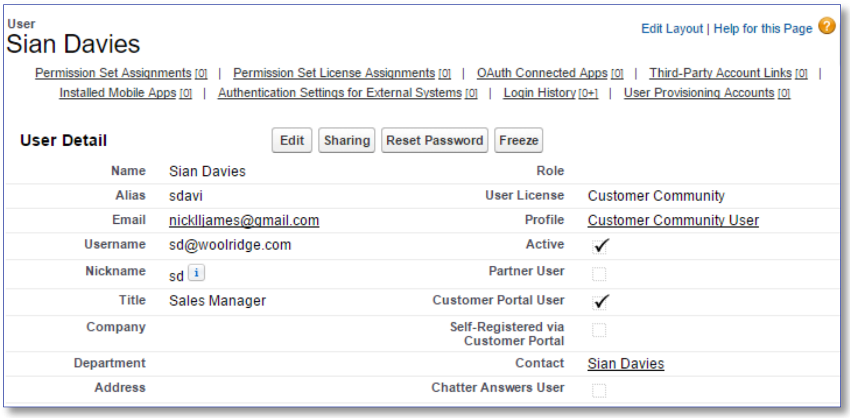


From the New User page, you can set the Supplier Contact’s Username and login details:

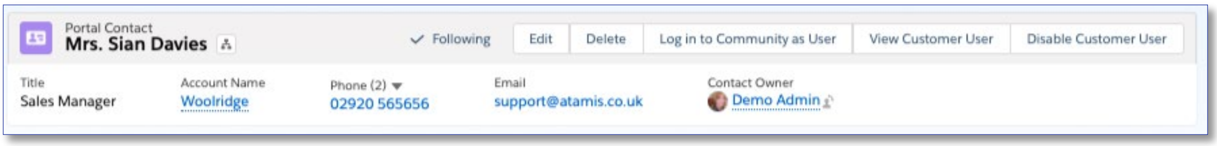


Number	Description
1	The Username will default to the email address of the Contact. It must be unique across the entire Salesforce user community, so if already taken, you will need to choose a different Username.
2	Select Customer Community Login from User License list and Customer Community User from the Profile picklist.
3	If you do not want the Contact to have immediate access, scroll to the bottom of the page **uncheck** Generate new password and notify user immediately and click **Save.**
	After you have created the user, from the User Page, in the `Permission Set Assignments`, click **Edit Assignments**, enable the Permission Set called **Supplier for Community** click **Save**.

To return to the Contact page, click on the **Contact** link on the User page:

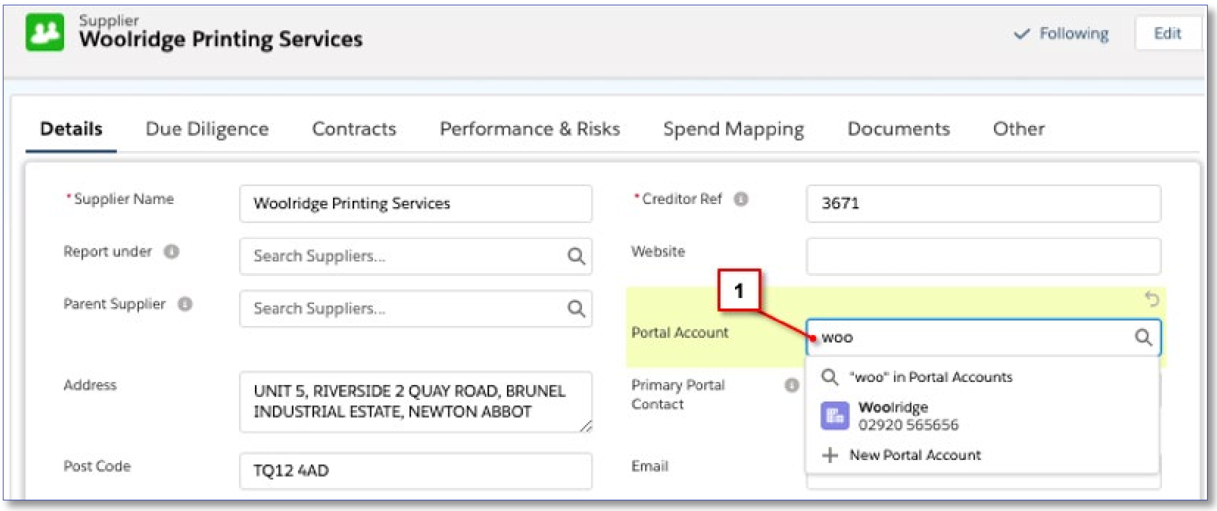


Once the Contact has been assigned a licenced user account, from the Contact page you are able to return to the User Account page, Disable the User Account or Log in to Community as User, by clicking on the buttons available at the top of the page, like in the example below:



Link the Supplier to the Portal Account

Finally, you need to link the Portal Account you have created to the appropriate Supplier record.



Number	Description
1	From the Supplier Detail Page, edit the Portal Account field to pick the Portal Account and click **Save**.

Only when this final step has been completed will the Supplier Contact be able to view any data when they log into the Supplier Portal. [If you were to assign the same Portal Account to a second supplier record (for example in the same company group structure) then the Contact would be able to see two supplier records when they log in.]

The access rights that suppliers have in the Supplier Portal will depend on your configuration but may include:

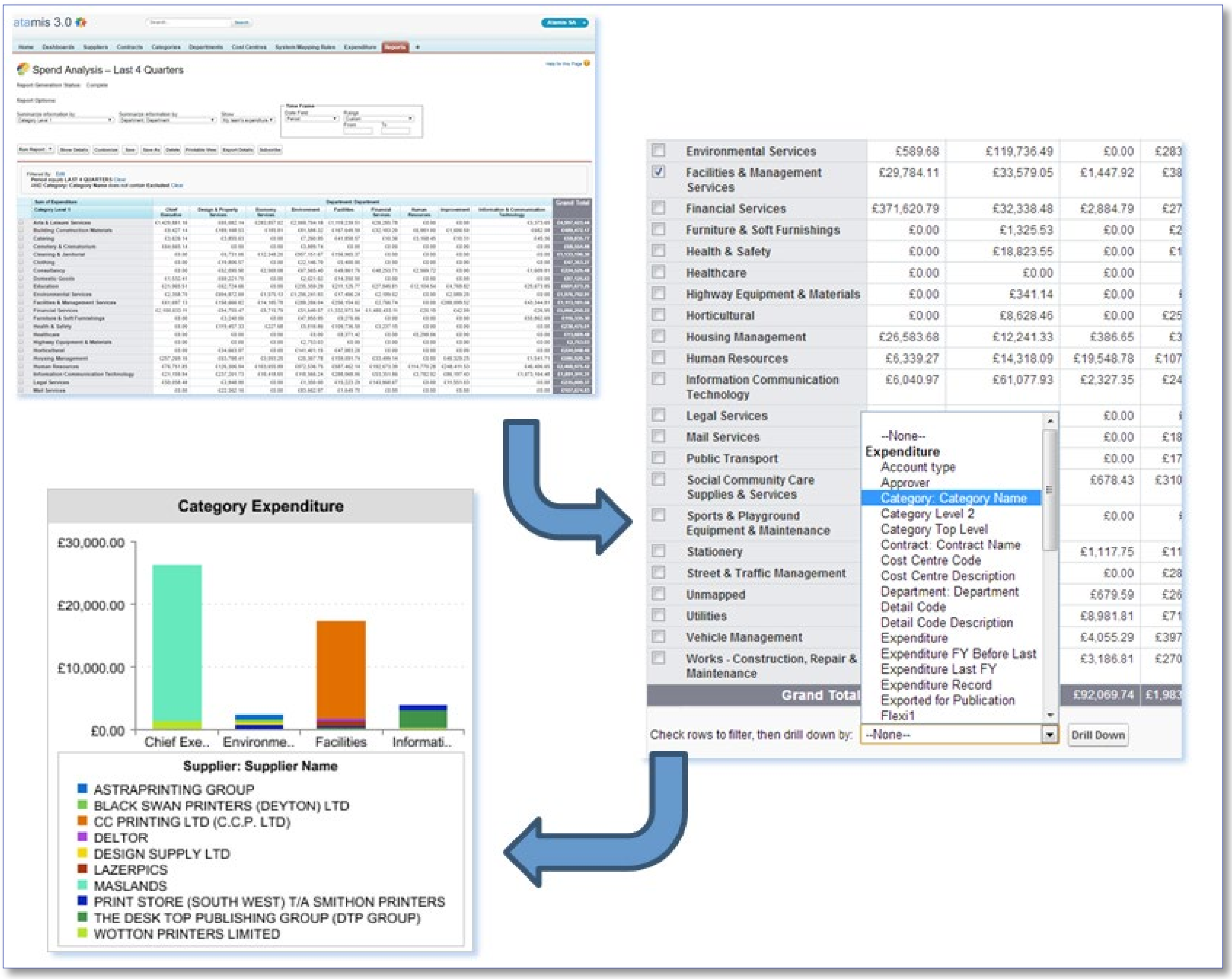
- View/update selected fields on the Supplier Detail Page
- View/update selected fields on Contracts that the Supplier has been awarded
- View/update Contract KPIs that have an open *KPI Completion Window*
- A sample of a Supplier Contact's view of the Supplier Portal is given below.

ATAMIS

Atamis SA: Spend Analysis

Quick Guide to Analysing Spend

To drill down and investigate which Suppliers you have been using recently for a particular Category of goods or services, select the `Last 4 Quarters` link from the Homepage (or alternatively use `Last FY` or `2 FY Ago`).



1 Select one or more Categories using the checkboxes on the left.

2 Select `Category Name` from the drop-down list and click **Drill Down**. (Category Name is a useful field to drill down on first as this will display the Categories that come under the Category Level 1).

3 Repeat steps 1 & 2 and drill down by `Supplier Name`. The chart below the table will display the total spend on the selected Category by each Department. Hover over the bars to display the Supplier Name and spend in the Last 4 Quarters.

More Reporting features are covered in depth in the Reports section of this User Guide.

Atamis SA Reports

For a quick reference on how to analyse spend data, please refer to the Quick Guide above.

For an introduction to Reports in Atamis 3.0 please refer to the Reports and Dashboards Overview section.

For detailed information on using Atamis SA reports, see the Training Exercises document or Atamis Video Tutorials which can either be streamed (from YouTube) or downloaded.

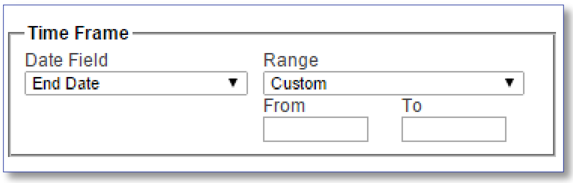
About SA Reporting Fields

All reports are based on a Report Type which defines the set of fields that can be used to analyse your data. For example, the Report accessed from the home Page link `Last 4 Quarters`, uses a Report Type called "`Spend Analysis`" which contains the fields most commonly used when analysing spend data.

If your system has had Flexi fields configured then these will have been labelled accordingly by Atamis at setup and will appear in alphabetical order in all field lists.

Advanced users may find that the field they require is not in the field list, so it may be necessary to create a new report using a Report Type with a broader field list. Please see our Training Exercises or Atamis Video Tutorials for further details. To find out which Report Type your Report is using, click **Customise** and the Report Type is displayed at the very top left of the Report Builder page.

Changing the Time Frame on SA Reports



The Time Frame options, located above the report, enable you to alter the time frame of a spend report. The Date Field provides a drop-down list of all possible dates to report on. For Spend Analysis reports, you should use the field "Period". Other date fields available may include date created, Contract Start Date, End Date, etc. depending on which Report Type the report uses.

The Range can either be chosen from a drop-down list, providing options such as current financial year, 2 FY Ago, etc. Alternatively, a date range can be customised by choosing **Custom** in the Range field and manually entering `From` and `To` date in the boxes provided, or choosing the dates from the calendar that will appear when clicking on the boxes. If you wish to report on data from a particular date up to the current day, select a *From* date and leave the *To* box empty, as this will automatically assign the *To* date to the current day.

If you are modifying the time frame of the report *Last 4 Quarters* from the Home Page, click on **Clear** to remove the *LAST 4 QUARTERS* filter (located just above the data table).

Filtering SA Data

The simplest way to filter your data is to use the drill down feature. Select one or more rows on your report and then click **Drill Down** (located below the report data). As explained in the Quick Guide to Analysing Spend, you can also change the axis of your report by first selecting another field from the field list.

All filter criteria that have been applied are displayed immediately above the report.

For more advanced filtering you can alternatively click **Edit** or **Customise** to open the Report Builder. Click **Add** from the Filters section, enter the filter criteria and click **Run Report**.

Show Details will expand out all data summarised in a report. You will notice that you are able to toggle between *Show Details* and *Hide Details*.

Atamis SA Dashboards

SA Standard Dashboards

The following dashboards are available with the SA module:

KPI Summary Dashboard

From the KPI Summary Dashboard you can access charts and reports on Total Spend, KPIs and Analysis on Suppliers, Categories and Departments.

Categories

In the Categories Dashboard you will find Category-focused charts reporting on Spend Analysis, Trend Analysis, Quadrant Analysis, Supplier Usage and Top Supplier Analysis.

Categories: Quadrants

This dashboard summarises a Kraljic Matrix by plotting Categories into one of four quadrants based on their level of expenditure, and level of risk. The four underlying reports include detailed scatter charts for each quadrant.

Departments

The Departments Dashboard will display Department-focused components referring to Spend Analysis, Trend Analysis, Invoice Analysis, Supplier Usage and Compliance.

Invoices

From the Invoices dashboard you will be able to find charts reporting on invoices from the Last 4 Full Quarters, Last 3 Months, Previous 3 Months, as well as Departments with Most Invoices, Top Suppliers with Most Invoices and Categories with Most Invoices.

Suppliers

The Suppliers Dashboard allows you to see Supplier-focused Spend, Invoice and Trend Analysis charts, in addition to Spend Distribution, Dependency Risk, Excluded and Unmapped Spend.

SA Data Enrichment Dashboards

The following data enrichment services and dashboards are available upon request.

Suppliers: Size, Sector and Location

These Dashboards will show the proportion of spend by the size of the supplier, the sector and the location of the supplier (local/non-local).

There are two versions of this Dashboard representing data from the previous FY, and from the last 4 full financial quarters (based on the current date, not the date spend data was last loaded).

In order to provide the most accurate representation, the Dial components on these Dashboards always display the proportion of spend where the Size, Sector or Location are *known*. The SME dial indicates the spend with SMEs as a proportion of spend on all sizes of enterprise, which by definition excludes public sector spend.

Care Quality

This data enrichment service populates your system with Care Quality Commission data from within your district, or your wider local area on request. From this, it is possible to compare the performance data of the health and social care providers available in your local area through a series of charts, dials, and tables.

To help you accurately analyse the impact of your current choice of providers, the CQC scores are shown per provider as well as analysing total spend with providers at specific ratings (Inadequate, Outstanding etc.). As data from all health and social care providers locally is shown, you can use the data to analysis the potential to upgrade services to providers with higher CQC ratings. For more information, check the Care Quality section.

Local Potential

The Local Potential dashboard contains a series of charts, dials, and tables that highlight spend with local suppliers, and compare with other local suppliers which you are currently not using.

An extension of standard local/non-local supplier analysis, this enrichment service populates your system with Companies House data providing. This data is matched to any spend currently with non-local suppliers of the same category and generates a list of alternative local suppliers. For more information, check the Local Potential section.

Spend Reclassification

Overview of Classification Rules

Atamis SA supports a powerful set of Rules for classifying unmapped spend and for re-classifying or refining previously mapped spend. Depending on your SLA, Atamis may be responsible for the full classification of your spend data, but even if this is the case you can still make use of these Rules to refine your spend based on internal knowledge of what goods/services you are using your suppliers for.

The Category Structure, or Taxonomy, you use to classify your spend will have been agreed at set up, and a full list of Categories can be obtained from the Categories Tab, or by locating the Report *All Categories*.

When you modify a Classification Rule in Atamis SA it will:

a) Reclassify your spend data in a background process which takes at least a few minutes to run
b) Be applied automatically at each routine spend data load

In both cases a prioritised, or tiered, approach is applied to classify your spend data:

For all spend data classified since your ProSpend v2.5 upgrade, the Tier used to classify your spend is recorded on the Expenditure Detail page in a field called `Atamiser: Tier`. On this page you will also be able to access a link to the precise Rule that was used to classify the Expenditure row, and the date/time it was classified.

Rules for Tiers 3 and 4 are set in Atamis SA on a Supplier's detail page.

Rules for Tiers 2 and 5 are accessed from the System Mapping Rules Tab. All of these rules will take a few minutes to apply to spend after changes are made.

It is not necessary to use all of these Tiers if you don't want to. For example, spend data could quite easily be classified using just Supplier Default Rules. If you do choose to use many Rules and Tiers, you'll find it's possible even to prioritise Rules within a single Tier where required. A full explanation of the Tiers follows:

Tier 1: Applied only during data loads when you have already provided Atamis with the exact Category you wish to be used for a spend transaction.

Tier 2: Priority System Mapping Rules take precedence over all other Rules. These can be used, for example, to set all spend data in the whole system associated with a particular Cost Centre or GL coding to a particular Category.

Tier 3: Supplier Custom Rules are best used when a Supplier provides more than one type of goods or services. They can be used, for example, to classify a Supplier's spend to a particular category only when the invoice line item description contains a particular word.

Tier 4: Supplier Default Rules will typically be used to classify most spend within a ProSpend system. If a transaction has not been classified using any of Tiers 1 – 3, then the Supplier Default Category is applied, i.e. the main Category of goods/services the Supplier provides.

Tier 5: Non-Prioritised System Mapping Rules are identical to Tier 2, except that they are applied only when no other rules are satisfied.

Tier 6: This is the Default Mapping Rule for the system and is generally set to 'Unmapped', i.e. spend which hasn't been classified.

Supplier Mapping Rules (Tiers 3 & 4)

If you have full Atamis SA permissions, you can modify a supplier's Default and Custom Mapping Rules to reclassify their spend. These rules, once set, are applied to all subsequent spend loaded into Atamis SA.

Suppliers can have a Default Mapping Rule (its default category) and Custom Mapping Rules. Each line item of spend is checked against the Custom Mapping Rules first. Custom Mapping Rules allow you to associate different types of expenditure to different categories based on textual information contained within the line item. If no Custom Rules are satisfied, the Default Category for the supplier is used.

When you make a change to the Default or Custom Mapping Rules, the system generates a batch process that will work through all of the expenditure transactions for the supplier and reclassify their spend. It will use a Custom Rule if the condition is satisfied, otherwise it will assign the Default Category. This may take a few minutes to process.

Depending on how your spend was originally classified, it may be possible that some expenditure transactions have been given a Category using Tier 1, i.e. at source rather than using a Rule. As soon as you modify any Rule, any such classifications will be overridden by the Default and Custom Mapping Rules.

Setting the Supplier Default Rule

To set the Default Spend Classification Category either click **Edit** from the Supplier Detail Page, or hover over the field and double-click the **Pencil icon** to use 'in-line editing'. The Category needs to match one of the recognised ProClass categories loaded into the system. Click on the **Picker icon** to open the Category Lookup dialog box. In the Category Lookup, type '*paper', for example, to find a category *containing* the word 'paper'. Type 'works' to find categories *beginning* with the word 'works'. It is not possible to retrieve a list of all categories using the Category Lookup. A full list of Categories can be accessed via the Categories Tab.

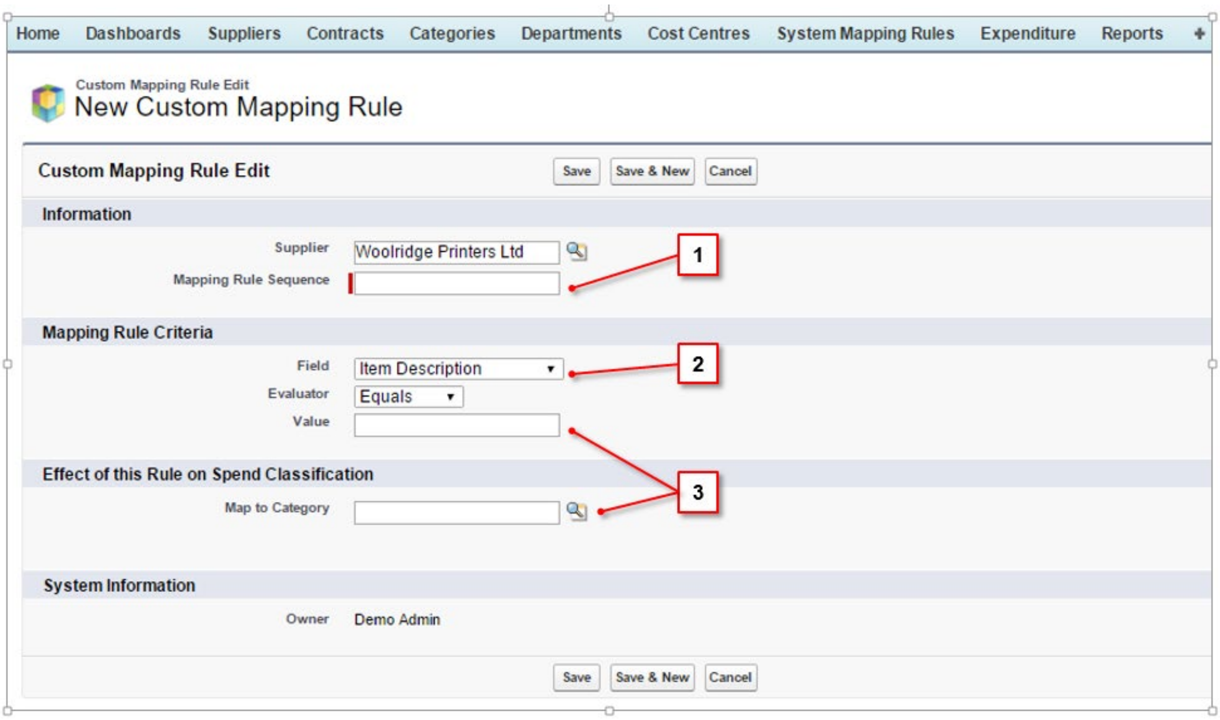
Modifying Supplier Custom Rules

To Create or Modify Supplier Custom Rules you will require access to the ProSpend SRM via a Licence Type of **Enhanced User** or above.

Supplier Custom Rules can be used to classify a single supplier's spend based on a scenario such as:

WHERE *'Detail Code Description'* CONTAINS *'print cartridge'* MAP TO CATEGORY *'ICT > Consumables'*

To add a Custom Spend Classification Rule, click **New Custom Mapping Rule** from a Supplier Detail Page.



Number	Description
1	The Mapping Rules Sequence can just be set to 1 unless you have multiple rules and wish to prioritise the order in which they occur, in which case use 1, 2, 3, etc. The Rule with Priority of 1 will be considered first, etc.
2	Rules can be based on any of the text-based fields in the Field drop-down list, and this list can be configured by Atamis Support to use other fields including any Flexi fields you may have had configured.
3	Select Evaluator and a textual value to complete the criteria for the Custom Rule. Tip: To create a rule where a field must Contain both ‘car’ AND ‘rent, enter ‘car%rent’ in the Value. To create an ‘OR’ condition you just add enter multiple rules. Then select the Map to Category to specify the effect of this rule. Categories can be searched in the same manner as described in the Setting the Supplier Default Rule section.

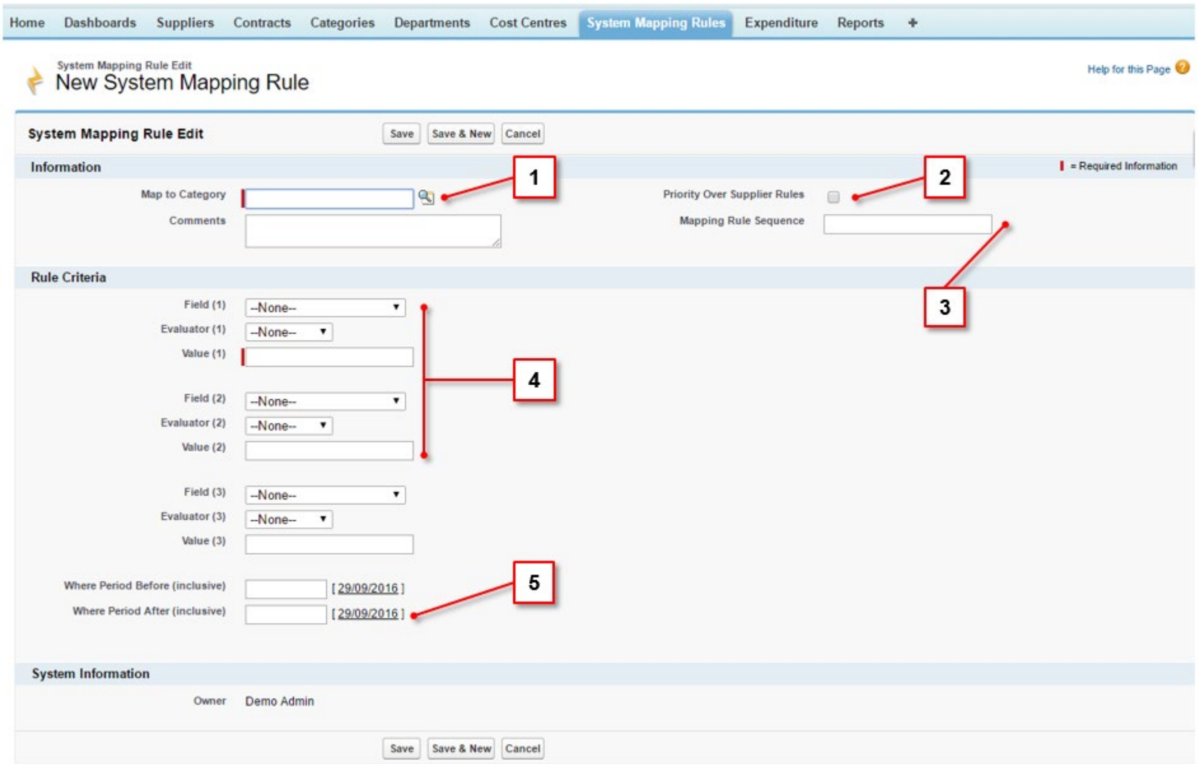
After you’ve saved the rule you will be taken to the Mapping Rule Detail page. To return the Supplier Detail page, select the supplier name.

ATAMIS

System Mapping Rules (Tiers 2 & 5)

To Create or Modify System Mapping Rules you will require a Licence Type of **Advanced User** or above.

To create a System Mapping Rule, click **New** from the System Mapping Rules Tab.

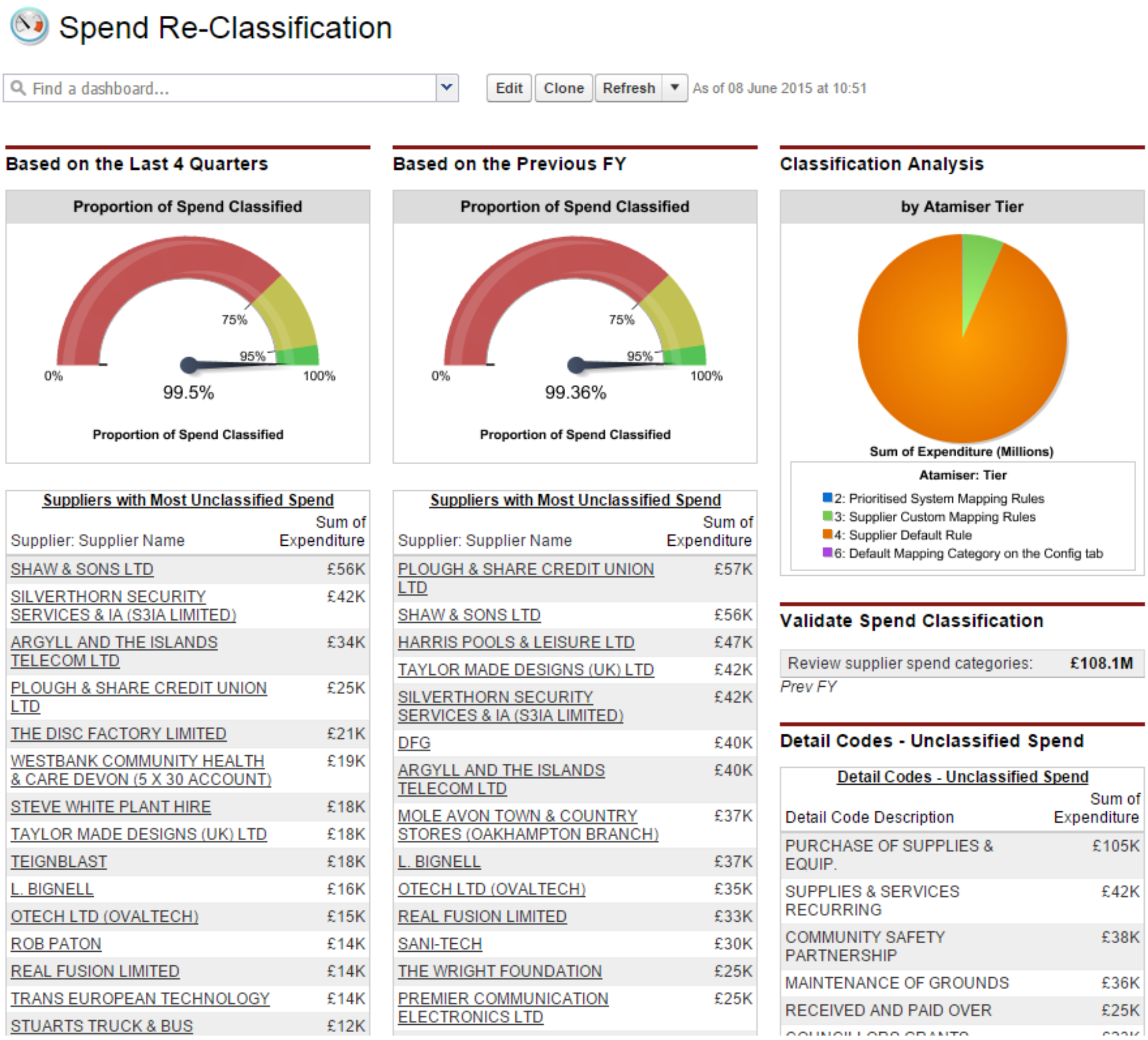


Number	Description
1	Select the Category which this Rule should map spend to by using the Category Lookup dialog box.
2	Check the box if you want your Rule to take priority over Supplier Rules, i.e. Tier 2. Leave it unchecked if you want your Rule to only be applied in the absence of other classification methods, i.e. Tier 5.
3	Optionally enter a Mapping Rule Sequence number to instruct Atamis SA about the order in which to consider your System Mapping Rules, where “1” is used first. Note that you can use decimals. For example, “1.5” to insert a new Rule between 1 and 2.
4	Check the box if you want your Rule to take priority over Supplier Rules, i.e. Tier 2. Leave it unchecked if you want your Rule to only be applied in the absence of other classification methods, i.e. Tier 5

5	Enter up to 3 criteria using Field, Evaluator and Value as described in Supplier Custom Mapping Rules above. The Field lists can be configured by Atamis Support to use other fields including any Flexi fields you may have had configured.
6	Optionally enter a date range that the Rule applies to and click Save.

Classifying Unmapped Suppliers

If you have requested the Atamis Spend Classification Service, Atamis will typically aim to classify 97% of your spend by value to a high level of accuracy. If you wish to, you can increase the proportion of spend that is classified by using the Spend Re-Classification Dashboard (accessible from a link on the Home Page).



The 20 suppliers with the highest value of 'Unmapped' spend in the Last 4 Quarters and in the Previous FY are displayed in the tables. Simply click on a supplier to access its detail page to set the Default/Custom Mapping Rules as explained above. If you have worked through all 20, click **Refresh** and, once the system has finished reclassifying spend, the next 20 suppliers will be displayed.

The *`Classification Analysis`* chart displays the proportion of spend which has been classified by each Tier of classification rules.

The `Validate Spend Classification` section allows you to verify the classifications used in the system. To use this, click **Review Supplier Spend Categories**. This will display a report showing your largest suppliers, and all Categories which their spend is currently classified to.

The *`Detail Codes – Unclassified Spend`* table shows a list of Detail Code Descriptions with the largest sum of unclassified spend. These Detail Codes are a good place to start when creating new System Mapping Rules.

Suppliers

The Standard Supplier Detail Page

You can Modify basic Supplier details with a **Standard** Licence Type, however you will need a **Full Access** Profile. To Modify all Supplier details, you will need access to Atamis SRM via a Licence Type of **Enhanced User** or above.

If you select a particular Supplier you will be taken to the Supplier Detail Page. The exact layout of your page will depend on the nature of your organisation (e.g. private/public sector) and any custom configurations applied. The following explanations summarise the Sections of the page typically used in most configurations.

Depending on which user profile you have, you may have the edit rights to alter fields. This can be done by double-clicking on the **Pencil icon** and then clicking **Save**, or alternatively click **Edit** to edit the entire record. Note that your editing permissions are determined by both your Licence Type and your Profile. Please contact Atamis Support if you require these to be changed.

The Supplier Spend Report button will display a report of spend with the particular Supplier, by Department and Period.

Supplier Detail Section

Field	Notes
Supplier Name	This field reflects the name received in the data submission, and can be changed by authorised users – see section below on Managing Duplicate Suppliers
Report Under	The Report Under field is used to 'move' spend from a supplier to a Parent supplier – see section below on Managing Duplicate Suppliers
Creditor Ref	This is the unique supplier identifier used by your finance system and should not be changed
Annual Turnover, Total Assets, & Nbr of Employees	If you have requested UK Company Size/Sector Data Services from Atamis, these fields will periodically be updated automatically by Atamis based on latest Companies House data. If you subscribe to ProSpend Communities you may also modify these details yourself in order to share data between other organisations in your Community (e.g. Local Authority Region)

Supplier Trading Data Section

Field	Notes
Region, Location and Ward	These fields are set automatically by Atamis for UK suppliers using the ONS Post Code Database. It is recommended that you do not modify these as the data may be overridden by automated processes.
Local?	For use primarily by Local Authorities, this field will be set by Atamis to "Local" when the supplier's Region, Location, Ward and/or Post Code match a custom definition of Local for your organisation, and otherwise to "Not Local". Authorised users may edit this field if desired (it will not be overridden). This field is used to calculate the number of local suppliers in Atamis SA dashboards and reports.
Local Proportion	Where a "Not Local" supplier is based in multiple locations and a proportion of your spend can be attributed as Local, enter a number between 0% and 100% to reflect the proportion of spend that is local. This field is used to calculate the proportion of spend with local suppliers on Atamis SA dashboards and reports.
Size	If you have requested UK Company Size/Sector Data Services from Atamis, the Company Size field is derived from the number of employees, annual turnover and total assets figures retrieved from Companies House and by applying an algorithm based on the EU definition of an SME.

	Atamis data services also identify the category of Individuals using matching algorithms against a database of common first names, last names and titles. This algorithm also takes into account common trading terms so, for example, "John Smith Solicitors" and "Peter Davies Building Contractors Ltd" would not be flagged as Individuals. A field called SME? is used in Atamis SA, which is derived from the Size and Sector fields and contains one of three values: SME Not SME Public Sector/Not Known Reports and dashboards that indicate the Proportion of spend with SMEs use the formula: (SME spend) / (SME spend + Not SME spend) * 100%
Sector	There are four possible values for this field: Private Sector, Public Sector, Third Sector and Not known. Atamis derives this data from either: Companies House data (the legal type of the business), a database of Charities, manual research of supplier websites or client updates via ProSpend Communities.

External Links Section

Field	Notes
Company Reg Nbr	For UK suppliers, the Company Registration Number is generated by matching to Companies House data based on company name and/or post code. Note that automated matching errors can occur – automated accuracy rates are typically 90%-95%, and suppliers can sometimes, for example, be mis-matched to parents or subsidiaries. Authorised users may update the Company Registration Number if the correct number is known.
DUEDIL Link	Duedil is an external service provider, free to register with, that provides useful financial, shareholder and classification data. Credit Reports and Company Accounts can also be accessed but require fees. The link will only appear when the Company Reg Nbr is entered.
Charity Reg Nbr	Authorised users may update the Charity Number if the correct number is known.

Charity Link	A Link to the Charities Commission website appears when the Charity Reg Nbr is entered.

Supplier Usage Last FY Section

The fields in the Supplier Usage Last FY are calculated by the system using the supplier's previous financial year spend data. If you would like these fields to use a different 12 month period (for example the current FY so far) please contact Atamis Support and this will be adjusted for you.

Field	Notes
Current Expenditure	The total current spend on the supplier in the current Financial Year.
Annual Expenditure	The total spend on the supplier in the last full Financial Year
Dependency Risk	This is calculated automatically as: Annual Expenditure / Annual Turnover * 100%
Nbr Depts Using	The number of Departments that have paid invoices to this supplier in the 12 month period
Used in Last 12 Months	Green if the supplier has been used in the 12 month period, Red otherwise
Top Supplier	By default the 500 suppliers with the most spend in the 12 month period are flagged as Top Suppliers. If you wish this number to be changed, please just contact Atamis Support.
Spend Range	Used in the Supplier Distribution reports, this field is automatically set to one of these values: a) < £100 b) £100-£1k c) £1k-£10k d) £10k-£100k e) £100k-£1m f) £1m-£10m g) > £10m If you want to generate a report using different bandings you can do so by customising the Report called Spend Distribution (Customisable Ranges) and modifying the Bucket Field called Custom Spend Range.

Duplicate Suppliers

There are two ways to address duplicate supplier records:

1. Change the Supplier Name
2. Set the Report Under field

Atamis Data Services can be configured to automatically use the first of these in a fuzzy matching process to set Supplier Names to a consistent name. Whenever the Supplier Name is changed by Atamis Data Services, the Original Supplier Name will always be retained on the Supplier Detail Page in the Section called `System Information`.

Change Supplier Name

Even where multiple versions of a supplier exist, they will appear in reports as a single row provided that they have the same Supplier Name. *Note that if you click on a Supplier Name to go to the Supplier Detail Page, you will be directed to the first supplier that Atamis 3.0 finds with this name.*

Ensuring that suppliers are named consistently will ensure that reports display only one row per supplier. See the Standard Supplier Page Section for more information on changing Supplier Names.

Report Under

If you identify that the supplier is a duplicate, it is possible to make it (and all expenditure and contracts associated with it) report under another supplier record. To do this, click **Edit**, go to the Report Under field and pick the correct 'master' supplier. This action will trigger the expenditure to 'move' to the parent supplier.

If you wish to revert your changes, simply delete the supplier *`Report Under`* field on the *`Supplier Page.`*

Supplier Data Enrichment

For clients using Atamis Data Services, for example Public Sector clients, Supplier information can be enriched by Atamis to provide publicly available trading details relating to the financials, size and sector of the Supplier. This data is derived from the following sources:

Automated Atamis Data Services: These use Companies House data via external service providers such as Dun & Bradstreet and Duedil, and the ONS Post Code database.

Manual Research: Where necessary, Atamis will periodically conduct manual research within client systems in order to get size, sector, and classification data for unclassified suppliers.

ProSpend Community: Public Sector organisations may subscribe to the ProSpend Community which facilitates the sharing of manual changes made by Atamis 3.0 users to other Atamis clients.

Contracts

A full list of Contracts can be obtained by clicking on **Contract Register** on the Home Page, or selecting the *All Contracts* View from the Contracts Tab. To export your contracts, select *Contract Register – Report for Export* from the Home Page and click **Export Details**.

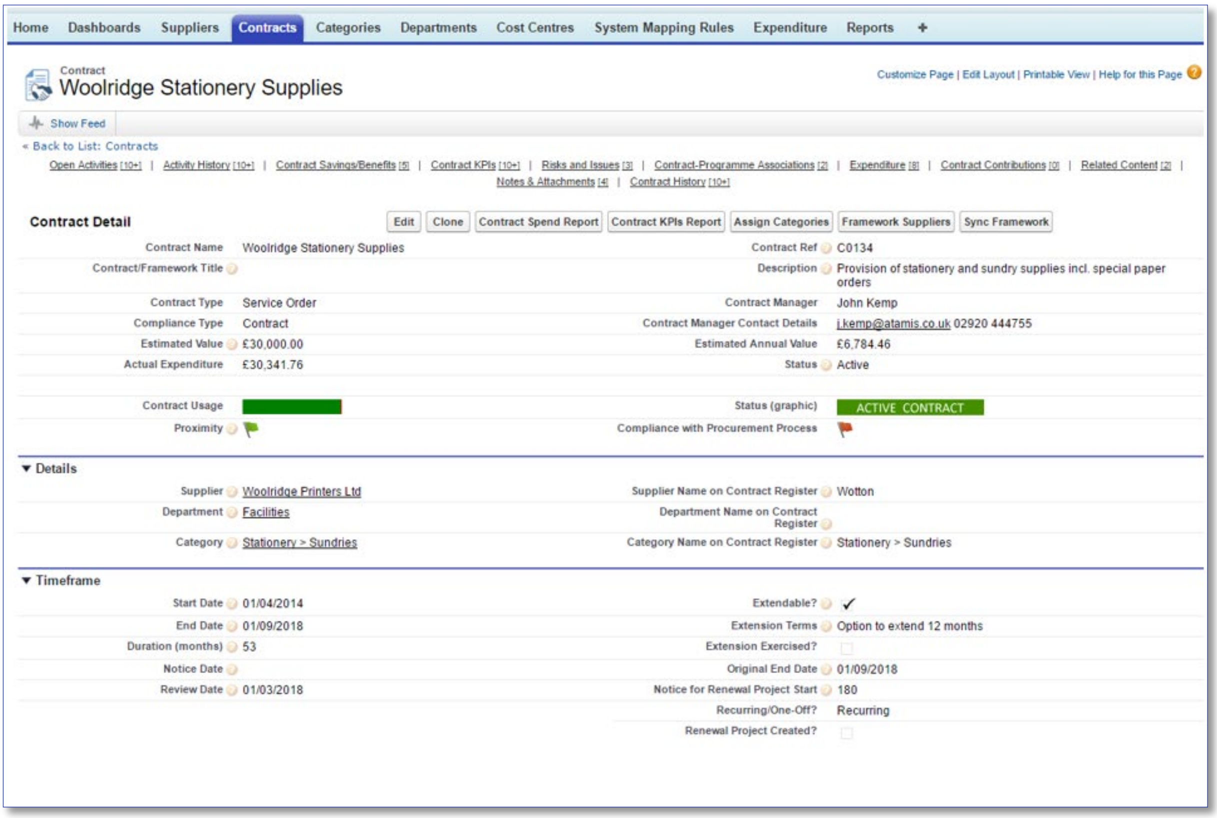
> You can Modify basic Contract details with a **Standard** Licence Type (Contract Name, Estimated Value, Supplier and Start/End Dates), however to Modify other Contract details you will need access to Atamis CM via a Licence Type of **Enhanced User** or above. See section on Atamis CM for further details.

The Standard Contract Detail Page

If you select a particular Contract you will be taken to the Supplier Detail Page. The exact layout of your page will depend on the nature of your organisation (e.g. private/public sector) and any custom configurations applied. The following explanations summarise the Sections of the page typically used in most configurations.

Depending on which user profile you have, you may have the edit rights to alter fields. This can be done by double-clicking on the **Pencil icon** and then clicking **Save**, or alternatively click **Edit** to edit the entire record. Note that your editing permissions are determined by both your Licence Type and your Profile. Please contact Atamis Support if you require these to be changed.

The Contract Spend Report button will display a report of spend with the particular Contract, by Department and Period.



Contract Detail

Field	Notes
Contract Name	A unique name for the contract. For frameworks, include the name of the supplier in the Contract Name.
Contract/ Framework Title	For frameworks make this the same value for all records
Estimated Value	The total estimated value of the contract including any active extensions.
Estimated Annual Value	Calculated by the system based on the Start and End Date
Contract Usage	See section on Contract Usage
Contract Ref	A unique, sequential number automatically generated by Atamis CM
External Contract ID	If you are using a third-party contract register, the unique contract ID on that system. Set automatically by the Contract Integration feature, and used in conjunction with the External Supplier ID to determine which contract record to update.
Status	Set manually. Values can be customised if required. The status is not currently updated automatically by the system to Archived when a contract expires.
Supplier	The Contracted Supplier. When picking the supplier, if there are duplicate supplier records, pick the one with the most Expenditure and edit the Supplier records of all the duplicate suppliers to Report Under the contracted supplier. This field forms part of the Contract Compliance Rules so editing it will trigger the Contract Compliance Algorithm.
Department	For use if you wish to keep track of contracts by Department
Category	For use if you wish to keep track of contracts by Category
... Name on Contract Register	These fields are populated by the Contract Integration or by contract data loads completed by Atamis Data Services based on the data imported. They are free-text fields that are purely for reference.

Timeframe Section

Field	Notes
Start and End Dates	These are mandatory fields. For rolling contracts with no fixed end date you will need to set the End Date to a date e.g. 10 years in the future.
Notice Date	The Contract Renewals dashboard uses the End Date to give notice, but if you wish to set a custom Notice Date on your Contracts you can use this field. There are pre-built reports that use this field that can be found by searching for the word 'Notice' on the Reports Tab.
Review Date	If you are not using Tasks and Events to set reminders, you can maintain this field and generate your own reports/dashboards with it.
Proximity	The flag turns from Green to Amber 18 months before the contract is due to expire in order to provide maximum warning. It turns Red after the End Date.
Original End Date	If you extend a contract, update the End Date but record the original end date in this field.

Framework Contracts

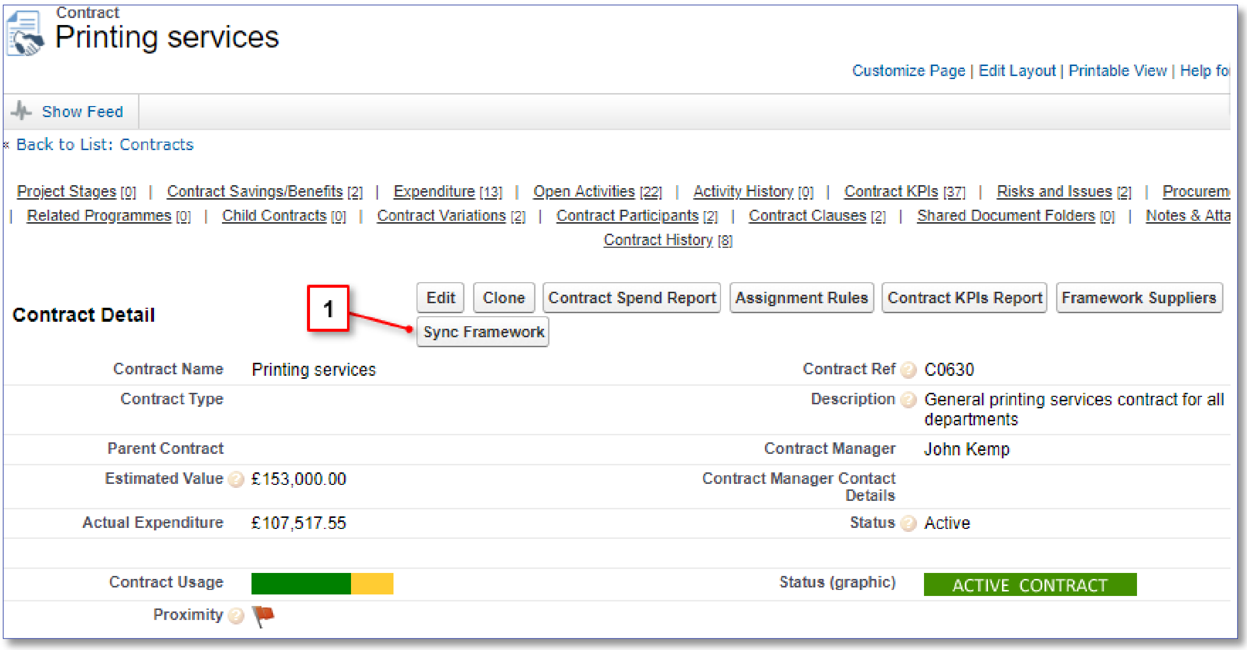
A Contract record in Atamis can only have one Supplier assigned. If you are setting up a framework with many suppliers you can create a Contract record for the first Supplier, then click **Save** and then **Clone** to make a copy. Simply change the Supplier and click **Save** and continue cloning as required.

We recommend you make the Contract Name unique for each Contract record by including the Supplier Name, e.g. "`Printing Framework Contract – Wotton Printers Ltd`", but make the *`Contract/Framework Title`* the same, e.g. "`Printing Framework Contract`". Using this convention, you will be able to group all Contract records under the Framework together in a Contracts Report or list them separately as required.

Atamis processes periodically calculate the number of Supplier records sharing the same Contract details, in order to set the *`Number of Suppliers Sharing Contract`* field. This is used to calculate the estimated value per supplier, in order to avoid the contract value being counted multiple times.

Making Changes to Framework Contracts

If the users require to update a field on a framework such as End Date, they do not need to make the change on for each supplier. The user can make the changes on one record and use the `Sync Framework` function.

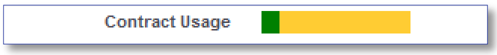


1 To make a apply a change across a Framework, first make and save the change on one supplier's contract record then click **Sync Framework.** Page will update and show which fields will get updated on the other suppliers' records under the framework.

Tip: Atamis Support can configure which fields get synchronised if needed.

Contract Usage

The Contract Usage bar is displayed on the Contract Detail page and on the All Contracts View.



It displays the total Actual Expenditure on the contract as a proportion of the total Estimated Value. Green represents actual contract spend. Amber represents the amount of under-utilisation of the contract. Red represents the amount of over-utilisation of the contract.

You can also use the Reports Contract Usage per Month and Contract Usage per Annum to obtain summaries over specific periods of time.

ATAMIS

Contract Compliance

Atamis SA summarises areas where there is most off-contract spend, and hence the greatest opportunity for generating further savings, on the Compliance Dashboard.

If your Finance/P2P system is capable of recording the contract that orders are placed under, then you can ask for Atamis SA to be configured to use this data to determine your contract compliance.

Alternatively, Atamis SA will, by default, use an automated algorithm to identify which spend transactions were placed under which contract. This algorithm is based on Contract Compliance Rules.

Overview of Contract Compliance Rules

There are two levels of Contract Compliance Rule:

Basic Contract Compliance Rules

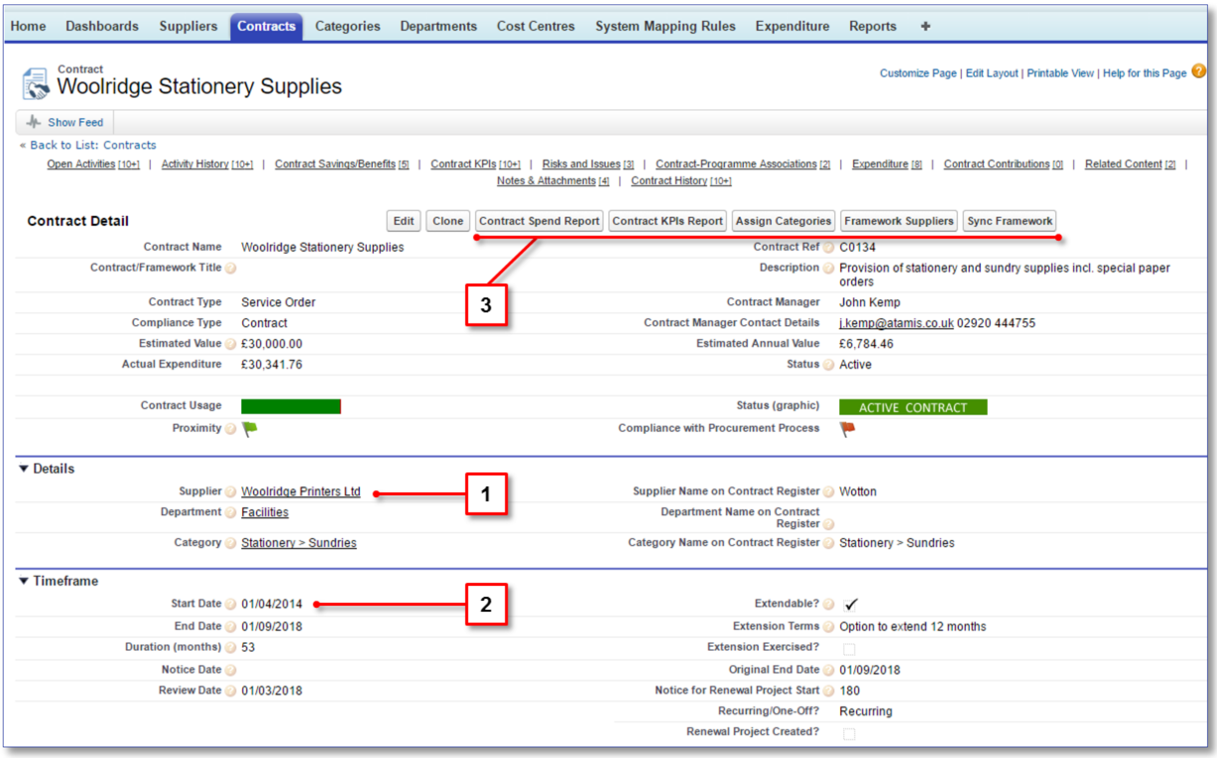
- The supplier
- The date of the transaction, which must be between the start and end date of the contract
- Advanced Contract Compliance Rules
- The Departments/Cost Centres the contract has been restricted to (if any are specified)
- The Categories the contract relates to (if any are specified)

When a Contract Compliance Rule is satisfied, Atamis SA will assign the appropriate Expenditure Records to the contract. When changes are made to Contracts the system will re-evaluate the Rules automatically and, if necessary, re-allocate Expenditure Records to or from Contracts.

Setting Basic Contract Compliance Rules

You can Modify Basic Contract Compliance Rules with a Standard Licence Type, however you will need a Full Access Profile.

Basic Contract Compliance Rules are set on the Contract Detail page.



Number	Description
1	To set the Supplier Name used on the Contract, double-click the Pencil icon then click the Picker icon to locate and select the Supplier and click Save.
2	To change the Start and End Dates, double click the Pencil icon, set the date and click Save.
3	A Contract Spend Report button opens a report which shows spend associated with the Contract. Additional buttons may be displayed here based on other modules or features which you have access to.

Note that by default the system will include transactions dated up to 30 days after the Contract End Date. This figure is configurable – please contact Atamis Support if you would like it changed.

Setting Advanced Contract Compliance Rules

You will require access to the Contract Management (CM) Module via a Licence Type of **Enhanced User** or above to modify Advanced Contract Compliance Rules.

The Assign Departments, Assign Cost Centres, and Assign Categories buttons can be used to ensure that only spend with selected Departments, Cost Centres, and Categories is assigned to the Contract.

Contract Compliance Algorithm

When you change any of the above Rules, the system will automatically generate a batch process that will work through all of the expenditure transactions for the contracted supplier and estimate which ones were purchased under that contract. This will take a few minutes to process. If more than one Contract could apply, the system defaults to using the Contract with the largest Estimated Value. When it has finished processing, you will be able to see the Expenditure transactions at the bottom of the Contract Detail page.

The Advanced Contract Compliance Rules can be used in conjunction with the Supplier Custom Mapping Rules for accurate compliance reporting of Suppliers with multiple Contracts, where each Contract relates to a different Category of goods/services.

Improving Contract Compliance Accuracy

You can easily identify off-contract spend which should be displayed as on-contract by using the Suppliers table on the Compliance dashboard. To correct the Compliance Rules, begin by searching for and opening the contract. If the supplier field is not set, select the supplier using the Supplier Lookup. If there are duplicate suppliers with that name, pick the one with the most spend and then see instructions for de-duplicating suppliers.

If the Supplier field is set, check the Start Date and End Date, as it may be that the contract needs to be renewed or extended.

Duplicate Suppliers

If the dates are correct, the only other possibility is that there are duplicates of the supplier, and the Report Under feature has not been used to set the Contracted Supplier as the ‘parent’.

If Report Under has been set incorrectly such that the Contracted Supplier is a ‘child’ supplier, then a Health Check routine run periodically by Atamis will detect this situation and automatically reassign the contract to the parent supplier.

Using Atamis SA with a Third-Party Contract Register

If you wish to maintain your Contract Register in an external system, and update Atamis SA with changes in order to able to use the Compliance reporting, Atamis now supports the following options:

- Send spreadsheet updates to Atamis in a specific format
- Use Contract Integration (e.g. supported by Due North's ProContract suite)
- Instruct Atamis to update from publicly available Contract Register Portals (e.g. Due North portals)

Sending Spreadsheet Updates

Depending on your Service Level Agreement, Atamis Support may be able to perform periodic Contract updates in Atamis SA from a spreadsheet you provide. This spreadsheet must be in a specific format which includes either the Atamis *Contract Ref* or the *External Contract ID* field for 'updates' so we know exactly which contract record to update. You can create a template by clicking on the link **Contract Register – report for export** on the **Home Page**, then clicking **Export Details**. Using this template:

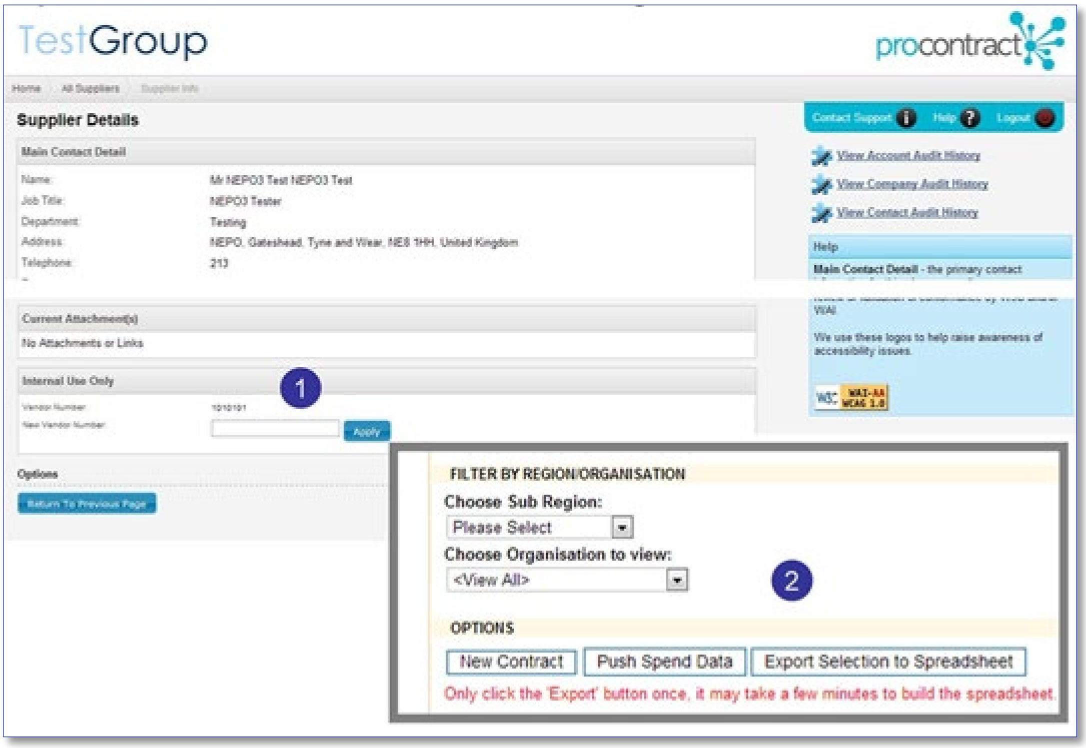
- Ensure that contracts with multiple suppliers are created as a separate row for each supplier
- Do not change any data in the Contract Ref or External Contract ID column
- If you are adding a contract row, please:
    - Always leave the Contract Ref field blank (Atamis 3.0 will allocate a unique Contract Ref for you)
    - Enter any unique contract number from your external system in the field External Contract ID.
    - If possible, provide the Creditor Ref of the exact supplier you wish to link to the contract
- Send the spreadsheet to support@atamis.co.uk and ask for it to be uploaded

Please note that we cannot accept spreadsheets in other formats if you are needing to update existing contract records, however we may be able to accept other formats for inserting new contracts.

ATAMIS

Using Contract Integration

UK Local Authorities that use the Due North Contract Register (part of ProContract v2) can send contracts automatically to Atamis SA (ProSpend). To ensure that any contracts you add get associated with the correct supplier in Atamis SA (ProSpend), it is recommended that you first set the Vendor Number of any contracted suppliers using the All Suppliers link in ProContract.



- Locate the supplier and at the bottom of the Supplier Details page, enter the Vendor Number. Note that this value relates to your Authority only, even though the supplier may be used by other Authorities too.

- To send contracts, ProContract users with an Admin or Org Admin role can select a link to Push Spend Data. Contracts can either be sent individually as part of the 'Promote to Contract Register' process, or in bulk. Updates are sent and processed in real-time.

The effect of pushing Contracts to Atamis SA differs depending on whether or not the Vendor Number has been entered beforehand. The chart below summarises the effect of A) first entering all Vendor Numbers in ProContract *before starting to send any contracts to Atamis SA*, and B) not entering Vendor Numbers before starting to send any contracts to Atamis SA:

Option	Initial Contract Load	Pushing New Contracts	Pushing Updated Contracts
A (The most accurate option, reflecting how integration was originally designed)	In ProContract, first set the Vendor Number of all contracted suppliers. Then Push ALL Contracts to ProSpend.	Ensure Vendor Number is entered for the contracted supplier before Pushing to ProSpend.	Just Push to ProSpend whenever making a change. (No duplicates will be created as ProSpend will already have the necessary IDs from ProContract.)
B (The least effort option, introduced in response to clients saying it was too cumbersome to enter Vendor Numbers in ProContract)	Ask Atamis to load your contracts from the Due North portal and match up suppliers with spend data using automated routines and manual checking. (Note that only 'Public' and not 'Private' contracts will be loaded.)	EITHER: Ensure Vendor Number is entered for the contracted supplier before Pushing to ProSpend. OR: Push to ProSpend and then select the correct Supplier for the Contract in ProSpend. Both approaches will ensure spend goes against the correct contract.	Ensure Vendor Number is entered for the contracted supplier before Pushing to ProSpend. A duplicate contract may be created in ProSpend, so: EITHER: accept that a duplicate exists (duplicates will not impact on contract compliance reporting) OR: delete the duplicate contract from ProSpend

Instructing Atamis to use Contract Register Portals

Due North clients not wishing to use the Contract Integration may alternatively instruct Atamis to pick up any new published contracts from a Due North Regional Portal.

If supported by your SLA, Atamis will, on a periodic basis, manually download your organisation's contracts from your Regional Portal. Atamis Support then compare them against existing Atamis SA or CM contracts (using the contract's title and start and end dates) and add any contracts that are not already in Atamis SA. The suppliers will be matched using a fuzzy matching algorithm. This would, for example, link "Print Centre" on your Contract Register with "The Print Centre Ltd" in Atamis SA.

This approach avoids having to configure and maintain the pushing of contracts from ProContract, but has two slight limitations:

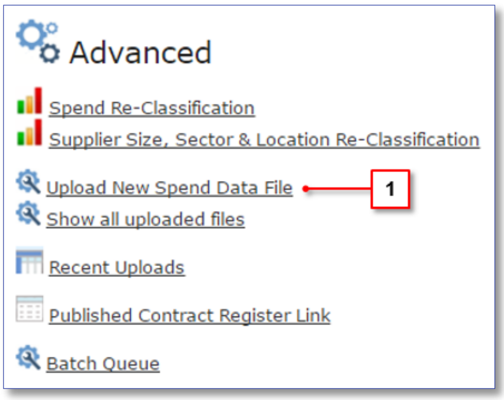
- Contracts are only added not updated
- Only contracts marked as 'Public' appear on the Due North portal, so 'Private' contracts would not be loaded

ATAMIS

Spend Data

Sending New Spend Files

Regular spend files should be uploaded via a link on the Home Page:



Number	Description
1	Click Upload New Spend Data File. On the following page, click Choose File ..., select the file and click Upload. (There is a 5MB limit for sending files this way). You will receive a confirmation email, and Atamis Support will be notified and a Support Case will be automatically created for us to process your file. Repeat this process if you have multiple files to upload.

Atamis does support alternative methods for uploading files, including large files. For more information contact support@atamis.co.uk.

Spend File Format

Atamis does not impose a fixed format for receiving your spend data. Instead, the format will be defined in a Spend File Format Template file, or files if appropriate. If you are uncertain of your Template, please request it from Atamis Support.

Spend files uploaded in a format matching the Template (exact column headings, column order, data formatting and file extension) are normally loaded within 48 hours (often less) and you will be notified by Atamis Support when the load has been checked.

Spend files sent in a format *not* matching the Template may incur a delay of up to 2 weeks to process if your Import Routine needs to be modified.

Requesting Changes to Templates

According to your SLA, it is normally possible to request Atamis to modify your Template if, for example, your change your finance system or you identify extra columns you would like to include.

Re-Loading Data

Again, depending on your SLA, if you realise you made a mistake in a spend data that Atamis has already loaded, you may have provision to be able to resend the file with corrected data and for Atamis to re-process the load. The re-loading of a full year of data however normally incurs a one-off data charge. [edit]

The Expenditure Detail Page

Some of the key fields on the Expenditure detail page are explained below:

Field	Notes
Expenditure Record	e.g. E0012889 – a unique code automatically assigned by Atamis SA to an Expenditure transaction.
Invoice Number	The Supplier's Invoice number, except when data has been aggregated, in which case this field normally displays the number of invoices that have been aggregated to create this Expenditure record.
Item Description	The Supplier's invoice line item text, except where data has been aggregated when this will normally display the text 'Aggregated data'.
Period	The payment date.
Expenditure	The invoice line item amount (excl. VAT), except when data been aggregated when it will contain the total amount of all the aggregated transactions.
Invoice Total	The total of all transaction amount with the same Supplier Creditor Ref and Invoice Number. Does not apply for clients where spend data has been aggregated.
Supplier	The supplier name, which may have been cleansed by Atamis Data Services to make it identical to a duplicate supplier. When new spend data is loaded, Atamis SA uses the Creditor Ref field to determine which supplier record to use. If one doesn't exist, it creates a new one.
Supplier Original Name	The supplier name as you provided it in the source data.

Contract	The Contract Name is set depending on the configuration you use. If you use Compliance Rules, the system sets it for you based on the Rules. Otherwise it is set from the Contract Ref column in the spend data files you provide. When new spend data is loaded, Atamis SA checks the Contract object to see if the Contract already exists on the system. If it doesn't, it creates a new one.
Contract Start Date	This is a lookup (formula) field taken from the Contract page.
Department	The Department Name is taken from the spend data you provide, but if it's missing and a Cost Centre was provided, Atamis SA will look at the relationship between the Cost Centre and its Department to set the Department field on the Expenditure record. If there's no Cost Centre either this field is automatically set to UNKNOWN. See section on Cost Centres and Departments about rectifying this. When new spend data is loaded, Atamis SA checks the Department object to see if the Department already exists on the system. If it doesn't, it creates a new one.
Cost Centre	When new spend data is loaded, Atamis SA checks the Department object to see if the Department already exists on the system. If it doesn't, it creates a new one. If the Cost Centre is missing on your spend file, it is automatically set to '0' in Atamis SA.
Detail Code	Also known as Account, Expense, GL or Subjective Code
Account type	Normally used to distinguish between Capital and Revenue expenditure, if provided, but can be used for other purposes.
Approver	Commonly re-used by clients for other purposes, e.g. Requisitioner, Buyer, etc.
Category	Set according to the Atamiser Classification Rules. The other category fields are either set automatically by Atamis SA or are lookup fields from the Category page. When new spend data is loaded, Atamis SA checks the Category object to see if the Category already exists on the system. If it doesn't, it creates a new one.

Transaction Details	If your data has been aggregated this field will show the details of the expenditure rows that have been aggregated. Each column is delimited by a '#' to enable you, if required, to copy/paste the data into Notepad, save as CSV and import into Excel using the Convert Text to Columns feature. Note that this field is normally truncated at 5,000 characters.
Flexi fields	Approx. 8 text fields and 3 numeric fields are available for use in spend data loads. When used, these fields are relabelled by Atamis to relate to your requirements.

Data Aggregation

The standard data allocation for an Atamis SA system is 500,000 rows (above which a small incremental storage fee applies). For clients with more than 100,000 expenditure records per year we normally recommend aggregating your data either prior to loading, or after loading to avoid having to purchase additional storage, and to improve the performance of running large reports.

Pre-Aggregated Data

As part of the preparation of your spend data prior to loading into Atamis SA, Atamis will aggregate multiple transactions into a single record, while retaining the following level of granularity:

- Supplier
- Department
- Cost Centre & Description
- Detail Code & Description
- Category
- Approver
- Account Type
- Up to 2 Flexi Fields

With each aggregated row, the Expenditure and Number of Invoices reflect the totals from all aggregated rows, the details of the aggregated rows are stored in the field Transaction Details.

Post-Aggregated Data

Normally conducted by Atamis on historic data, e.g. more than 2 years ago, this form of aggregation retains just the following level of granularity:

- Supplier
- Department
- Category

With each aggregated row, the Expenditure and Number of Invoices reflect the totals from all aggregated rows.

Cost Centres and Departments

The Cost Centre and Department fields are set on Atamis SA Expenditure records as described in The Expenditure Detail Page section above.

It is common for Cost Centres to 'move' Departments from time to time. Provided you are sending the latest Cost Centre and Department data in your spend files (i.e. that is correct at the time of sending) then your data should always display correctly in Atamis SA.

Example

Cost Centre `1234` belonged to `Department A` last year, but 'moved' to `Department B` this year.

The spend data sent to Atamis *last* year used Cost Centre `1234` and `Department A`.

The spend data sent to Atamis *this* year used Cost Centre `1234` and `Department B`.

In Atamis SA, when we run a spend report for …

All Time

Filtered by Cost Centre = `1234`

Grouped by Department and Year

… we would see spend under `Department A` for *last* year, and spend under `Department B` for *this* year.

However, if you wish to, you can alternatively change all Expenditure with a given Cost Centre to be displayed under its new Department by rehoming Cost Centre (see below). This feature can also be used to assign spend under the `UNKNOWN` Department to the correct Department.

Rehoming Cost Centres to a Different Department

Rehoming Cost Centres requires user to have a Power User Licence Type.

To change reset the Department for all Expenditure associated with a particular Cost Centre, locate the Cost Centre detail page and edit the Department field, using the Picker icon to select the Department. This action will trigger off a batch process that will take a few minutes to 'rehome' Expenditure records to the selected Department.

Categories

Category Structures

The Primary Category Structure or taxonomy that you have selected for your Atamis SA system can be viewed on the Categories Tab. You can also use the report called All Categories to export a list of categories.

Categories records are made up of a number of fields, arranged into a hierarchy of levels. 4 levels can be accommodated using the fields Category Level 1, Category Level 2, Category Level 3 and Category Name. The Category Name normally contains a summary of all levels, including the 4th level if used. This convention allows you to use Categories from any level.

The Alternative Category Structures fields can be used to cross-reference to other taxonomies you may also wish to use in your spend analysis. Note that Alternative Category Structures can only be used where the taxonomy is less granular than the Primary Category Structure. The Alternative Category Structures fields are included in the standard Spend Analysis Report Type.

Modifying Category Structures

Modifying Categories requires a user to have a Power User Licence Type.

If you are using Atamis Data Services, or if you are a member of ProSpend Community, it may not be possible to modify your Primary Category Structure. Please contact Atamis Support for details, and where possible we will grant you Create and/or Edit rights.

Category Grouping

Grouping Categories requires a user to have a Power User Licence Type.

You can group your Categories into meaningful areas, for example, by Category Manager or by over-arching category groupings. Contact Atamis Support to have your Category Grouping values set up, and then from the Category Detail page, edit the field Category Group picklist field. You can also export the report All Categories, set the Category Group in Excel, and email your list to Atamis Support to upload.

The field Category Group is included by default in the Spend Analysis Report Type.

Quadrant Analysis

The Quadrant Dashboard plots each Category into one of four quadrants based on the Category Risk and Annual Expenditure levels. The Category Risk score is calculated from the three questions on the Category detail page by scoring each picklist value as 0, 20, 40, 60, 80 or 100, and then applying a weighting where the question "How critical are these goods and services…" carries twice the weight of each of the other two questions. The full formula used is:

```
( CASE( How_critical_are_these_goods_services__c , "Not at
all", 0, "Only slightly", 20, "Fairly important", 40,
"Important", 60, "Very important", 80, "Critical", 100, 0) *
50 +

CASE( How_easy_would_it_be_to_swap_suppliers__c , "Trivial",
0, "Easy", 20, "Moderately easy", 40, "Not straightforward",
60, "Complicated", 80, "Very complicated", 100, 0) * 25 +

CASE( What_is_the_size_of_the_supply_market__c , "Very large
(many suppliers)", 0, "Large", 20, "Medium", 40, "Small", 60,
"Very small", 80, "Only one supplier", 100, 0) * 25 ) / 10000
```

Categories with a Risk Score > 50 appear as High Risk in the Quadrant Dashboard. Clicking on a quadrant will display a Report with a full X-Y scatter plot of the Categories within that quadrant.

Atamis PM: Pipeline Management

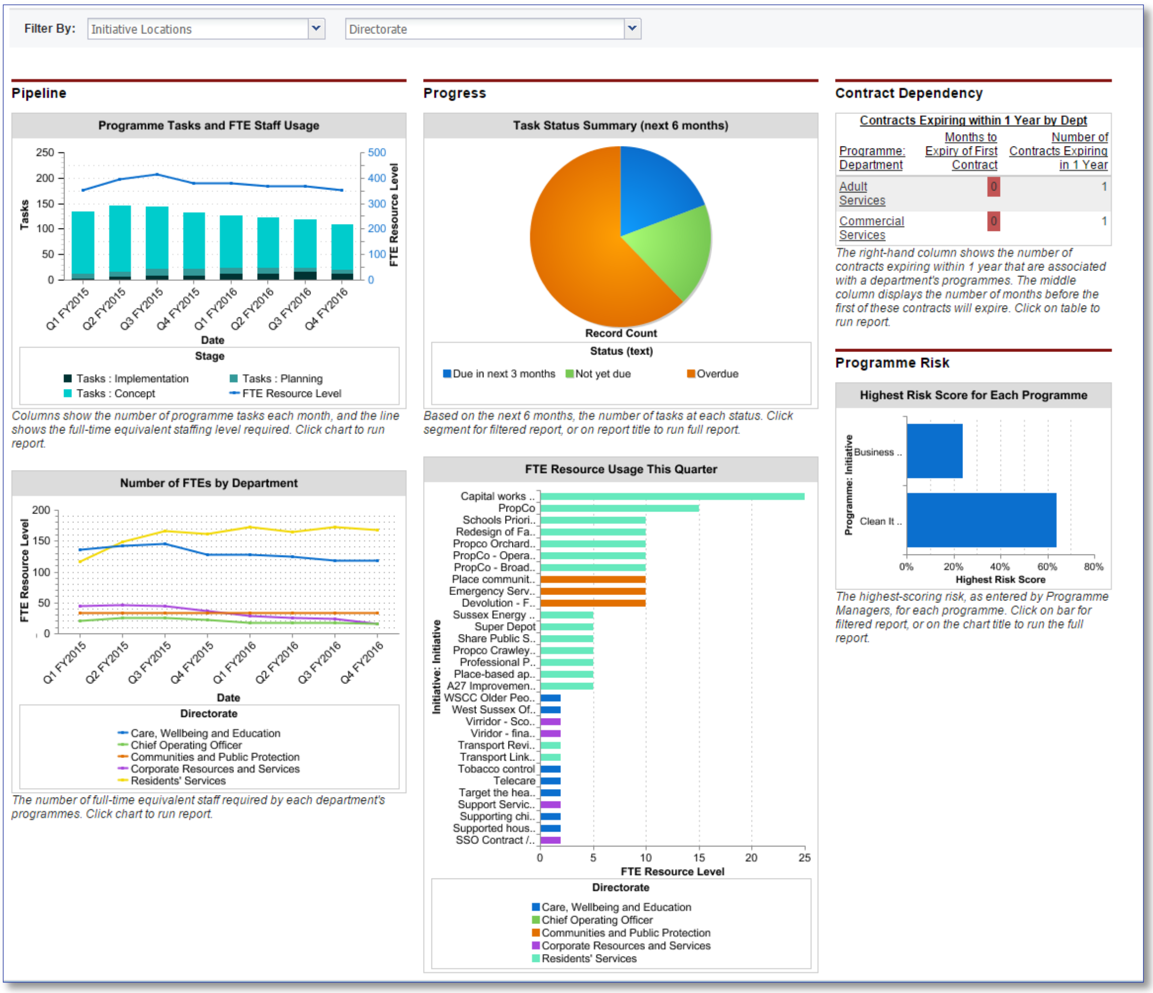
Atamis PM is a pipeline management tool for planning procurement operations:

- planning future resource usage
- monitoring progress
- establishing commonality within programmes
- establishing dependencies on procurement contracts
- monitoring risks and issues

PM Reports and Dashboards

Programme Dashboard

Corporate Programme activity is summarised on the Programmes Dashboard:



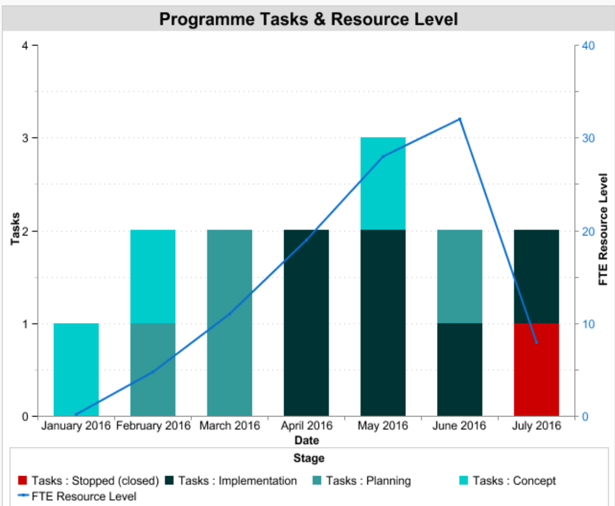
The Dashboard is arranged in three columns:

- Pipeline
- Progress
- Dependency and Risk

To view a detailed report in each area, click on the **Dashboard Component**. For instructions on cloning, creating and customising and Dashboards (for example to create distinct Dashboards for each Department) please refer to the Core Features section. You may also wish to add filters at the top of the Dashboard to enable dynamic filtering by Location, Department, Category, etc.

Pipeline Reports

Pipeline reports report on the number of tasks at each stage for each period, and on the FTE (Full-Time Equivalent) projected staffing levels.



			Date							Grand Total
Programme: Programme	Stage		January 2016	February 2016	March 2016	April 2016	May 2016	June 2016	July 2016	
Network Improvement Programme	Concept	FTE Resource Level	0							0
		Tasks	1							1
	Planning	FTE Resource Level		2	6					8
		Tasks		1	1					2
	Implementation	FTE Resource Level				9	12	30		51
		Tasks				1	1	1		3
	Stopped (closed)	FTE Resource Level							3	3
		Tasks							1	1
	Subtotal	Stage	1	2	2	3	3	3		
		FTE Resource Level	0	2	6	9	12	30	3	62
		Tasks	1	1	1	1	1	1	1	7
Strategic Project 2	Concept	FTE Resource Level					1			1
		Tasks					1			1
	Planning	FTE Resource Level						2		2
		Tasks						1		1
	Implementation	FTE Resource Level							5	5
		Tasks							1	1
	Subtotal	Stage					1	2	3	
		FTE Resource Level					1	2	5	8
		Tasks					1	1	1	3
Strategic Project 3	Concept	FTE Resource Level		3						3
		Tasks		1						1
	Planning	FTE Resource Level			5					5

The system uses a colour-convention for high-level Programme stages which are reflected in the colours used on Pipeline reports:

Graphic	Stage	Notes
	Concept	Programme identified/required but not yet started
	Planning	Resource is being dedicated to planning the detail of Programme
	Implementation	Programme has been fully approved and is under-way
	Decision Required	Used when the future of the Programme is undetermined
	Stopped	Used when the Programme is stopped and resources are no longer required

Progress Reports

These reports are based on the number Tasks at each Status. Although there are detailed Status options available the reports summarise all tasks into three types:

- Not yet Due (more than 3 months to Due Date)
- Due within 3 months
- Overdue

This is the highest level of grouping used in the Programmes with Tasks Due report (shown below) which can be run by clicking on Task Status Summary (next 6 months) from the top, centre of the Programmes Dashboard.

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Subject	Stage	Stage (graphic)	Month	Number of Resources (nbr)	FTE Resource Level	Department	Resource Level (graphic)	Status	Status (graphic)	Assigned	Date ↑
Status (text): Due in next 3 months **(4 records)**											
Programme: Programme: Network Improvement Programme **(2 records)**											
Startup	Planning		February 2016	3.00	1.80	New Dept 2		Not Started		Nick Dev Org	11/02/2016
Finalise planning	Planning		March 2016	10.00	6.00	New Dept 1		Not Started		Nick Dev Org	16/03/2016
Programme: Programme: Strategic Project 3 **(2 records)**											
Task	Concept		February 2016	3.00	3.00	New Dept 1		Not Started		Nick Dev Org	18/02/2016
Task	Planning		March 2016	5.00	5.00	New Dept 1		Not Started		Nick Dev Org	24/03/2016
Status (text): Not yet due **(8 records)**											
Programme: Programme: Network Improvement Programme **(4 records)**											
Implementation starts	Implementation		April 2016	15.00	9.00			Not Started		Nick Dev Org	21/04/2016
Implementation: Phase 1	Implementation		May 2016	15.00	12.00	New Dept 1		Not Started		Nick Dev Org	19/05/2016
Implementation: Phase 1	Implementation		June 2016	30.00	30.00	New Dept 1		Not Started		Nick Dev Org	23/06/2016
Implementation: Phase 1	Stopped (closed)		July 2016	3.00	3.00			Not Started		Nick Dev Org	14/07/2016
Programme: Programme: Strategic Project 2 **(3 records)**											
Task	Concept		May 2016	1.00	1.00	New Dept 1		Not Started		Nick Dev Org	11/05/2016
Task	Planning		June 2016	2.00	2.00	New Dept 1		Not Started		Nick Dev Org	16/06/2016
Task	Implementation		July 2016	5.00	5.00	New Dept 1		Not Started		Nick Dev Org	14/07/2016
Programme: Programme: Strategic Project 3 **(1 record)**											
Task	Implementation		April 2016	10.00	10.00	New Dept 1		Not Started		Nick Dev Org	13/04/2016
Status (text): Overdue **(1 record)**											
Programme: Programme: Strategic Project 3 **(1 record)**											
Task	Implementation		November 2015	15.00	15.00	New Dept 1		Not Started		Nick Dev Org	04/11/2015

Risk Reports

The right-hand column displays Programmes that are associated with (or dependent upon) Contracts that are due to expire.

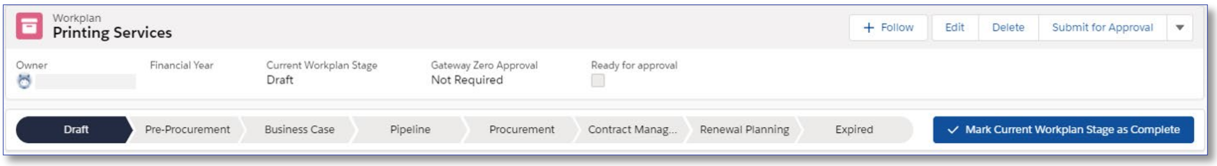
It also displays a list of Programmes with their highest Risk Score.

Workplans

Atamis has further enhanced its support for planning procurement/commercial activity with the introduction of Workplans. This optional feature allows Atamis PM users to develop a Workplan that groups together activities covering the entire commercial lifecycle. The default stages for a Workplan are:

- Planning
- Pre-Procurement
- Business Case Approval
- Pipeline
- Procurement
- Contract Management

- Renewal Planning
- Expiry

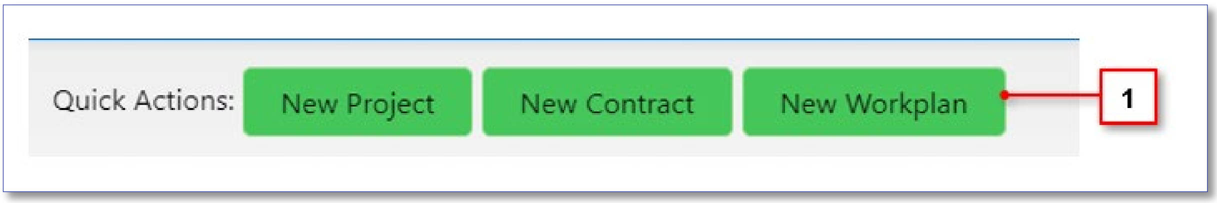


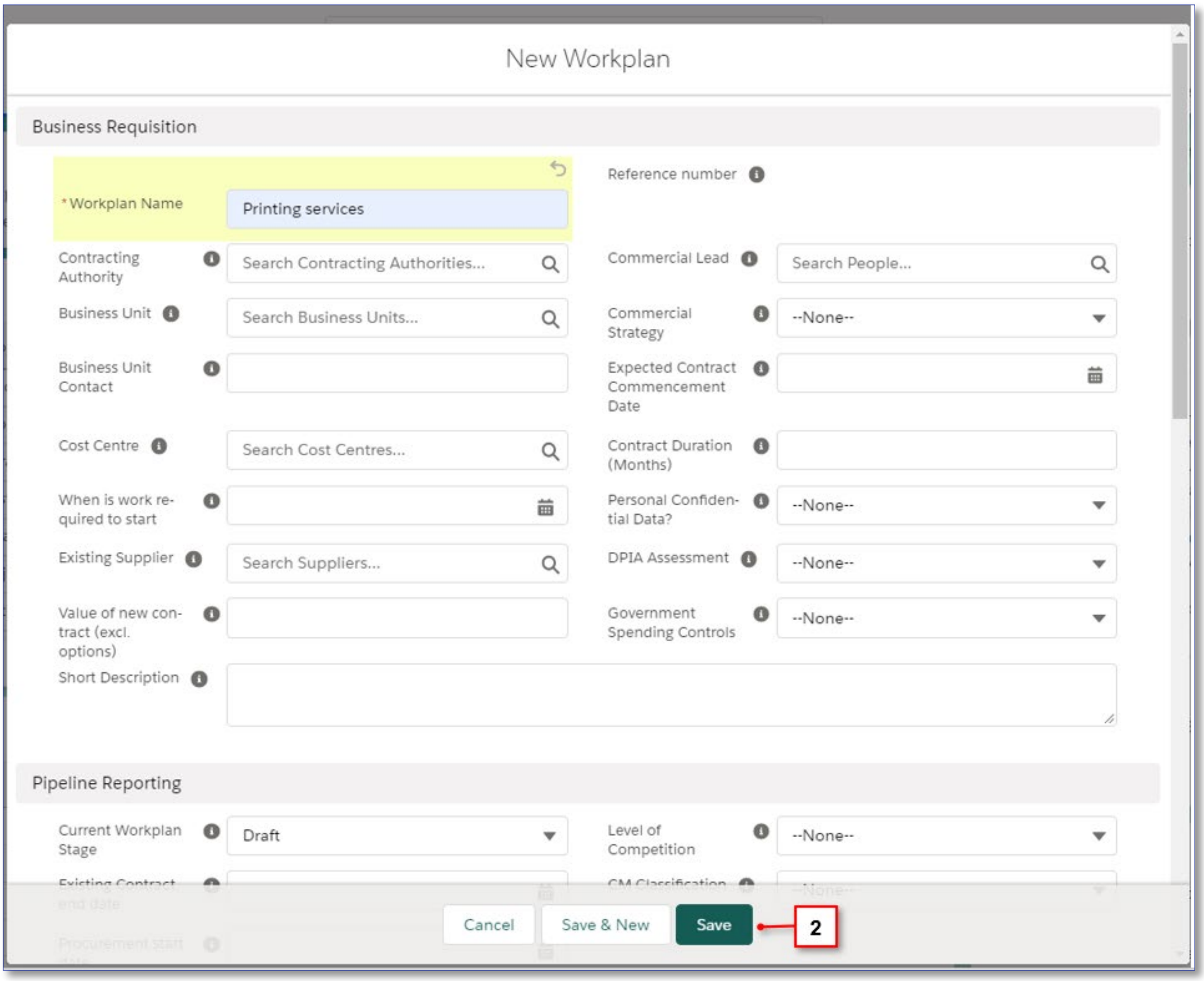
Note: The Workplan object can be extensively customised based on client requirements. The screenshots and processes described in this guide may be different than the ones your organisation is using. If you have any questions regarding the process of progressing with a workplan, please contact your `System Champion` and for technical difficulties, please contact `Atamis Support`.

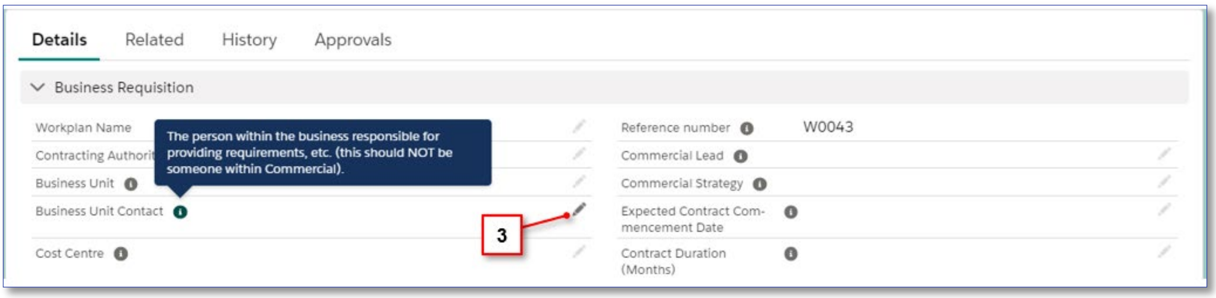
ATAMIS

Creating and Editing Workplans

The process of creating a workplan record is identical with the creation of other records on Atamis and it makes use of the New button available on the page. This can be found on the Home Page or on the Workplans tab.







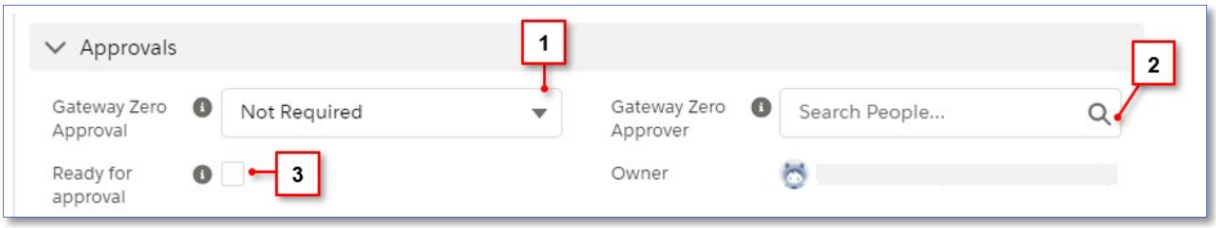
Number	Description
1	To create a new workplan, navigate to the Home Page and click on New Workplan.
2	Mandatory fields are being marked with a red star (*). Complete mandatory fields and click Save.
3	Click on the pencil icon ( ) to populate a field. Information and guidance are provided in the hover help ( ) for every relevant field.

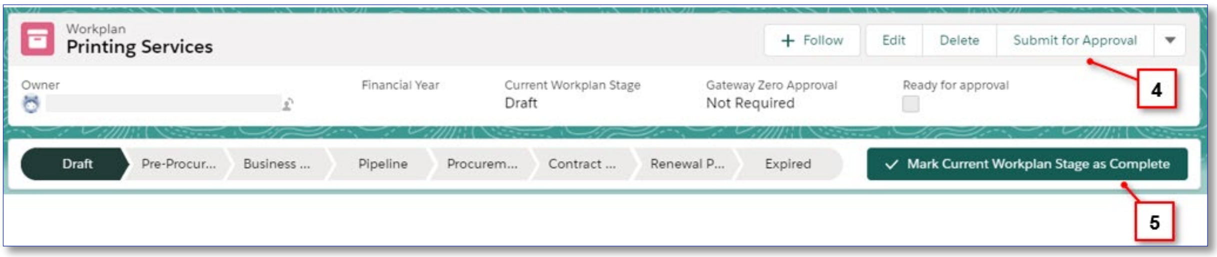
Approving Workplans

Workplans can be configured to trigger *Approval Workflows* at each Workplan Stage. The default stages for a Workplan are:

- Planning
- Pre-Procurement
- Business Case Approval
- Pipeline
- Procurement
- Contract Management
- Renewal Planning
- Expiry

Every Workplan record will contain an *Approvals* section on the page which will specify approval details.





Number	Description
1	You can specify if an approval is required at each stage by selecting one of the options available on the list. Some systems may have this field auto-populated based on information entered in other fields, such as Estimated Contract Value or Allocated Budget.
2	Search for the name of the user that has the authority to approve this Workplan.
3	After your Workplan has been completed, you can mark it ready for approval by clicking on the Ready for approval checkbox.
4	To send a Workplan for approval, navigate to the top of the page and click on Submit for Approval. You will be prompted to enter some text to address the approver following which you can complete the action. Email notifications are being triggered with every approval request and the approver can approve the record via the system or by replying with the word Approved to the email.
5	Once the workplan has been approved, you can mark the stage as being completed, by clicking on Mark Current Workplan Stage as Complete. This action will update the page and you will be able to proceed with the next stage of the workplan.

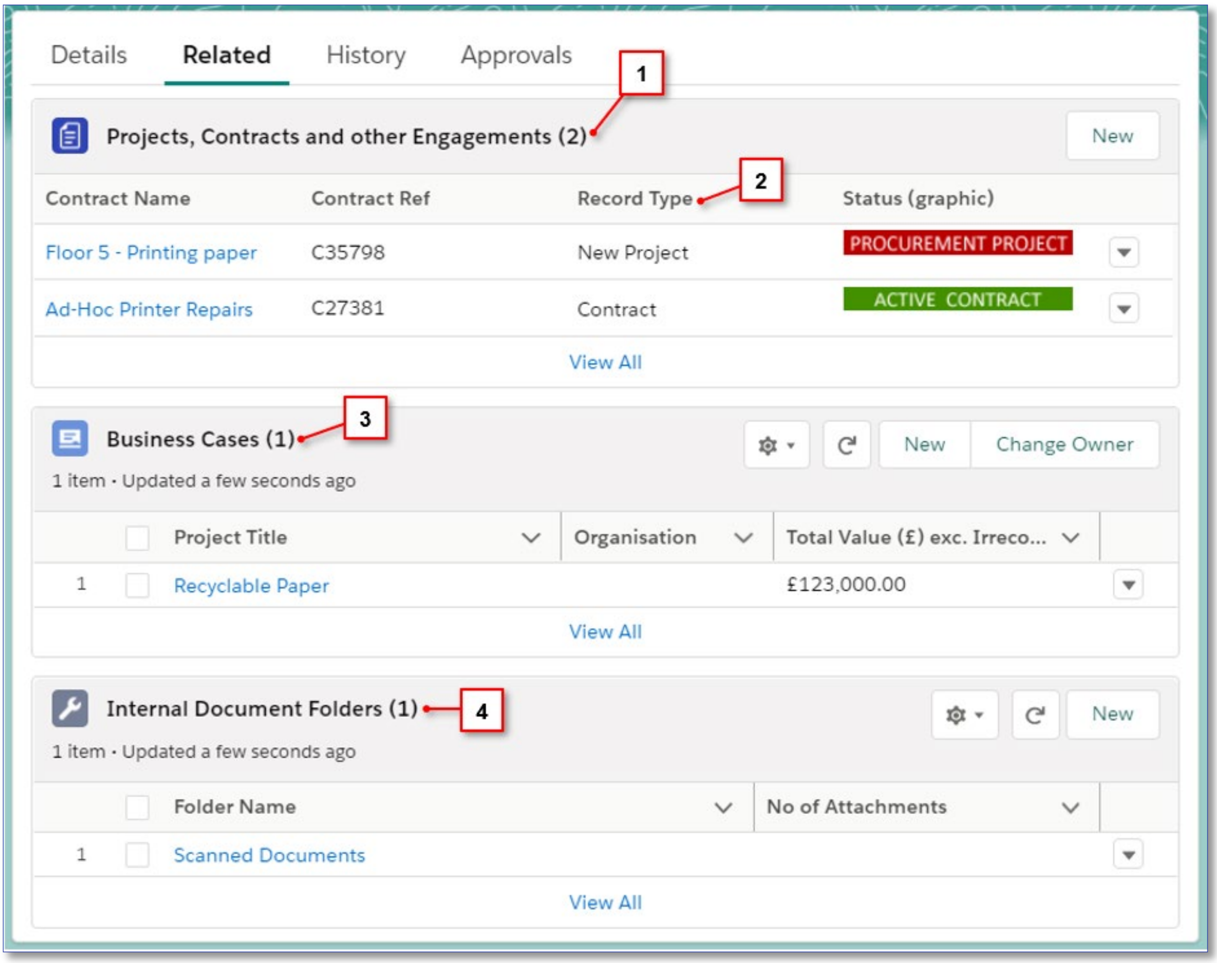
Note: The Workplan Stages can be enabled on the system without the Approval Workflow. In this scenario you will be prompted with the following message after clicking on Submit for Approval: No applicable approval process was found. This means that no Approval Workflow has been set up for your system. If you have any questions regarding the process of progressing with a workplan, please contact your System Champion and for technical difficulties, please contact Atamis Support.

Workplan relationships with other records

Workplans are particularly effective with recurring goods or services where historic contracts can be seen alongside renewal activity such as new market engagements or re-procurement projects. This feature also helps with more complex relationships between projects, for example where a pre-procurement engagement may be used as the basis for multiple procurement projects.

Navigate to tab related to view linked records to current workplan.

To create new records, simply click on **New**. To link existing records to workplan, navigate to the relevant record and populate the `Workplan` field. The linked record will appear on this list.

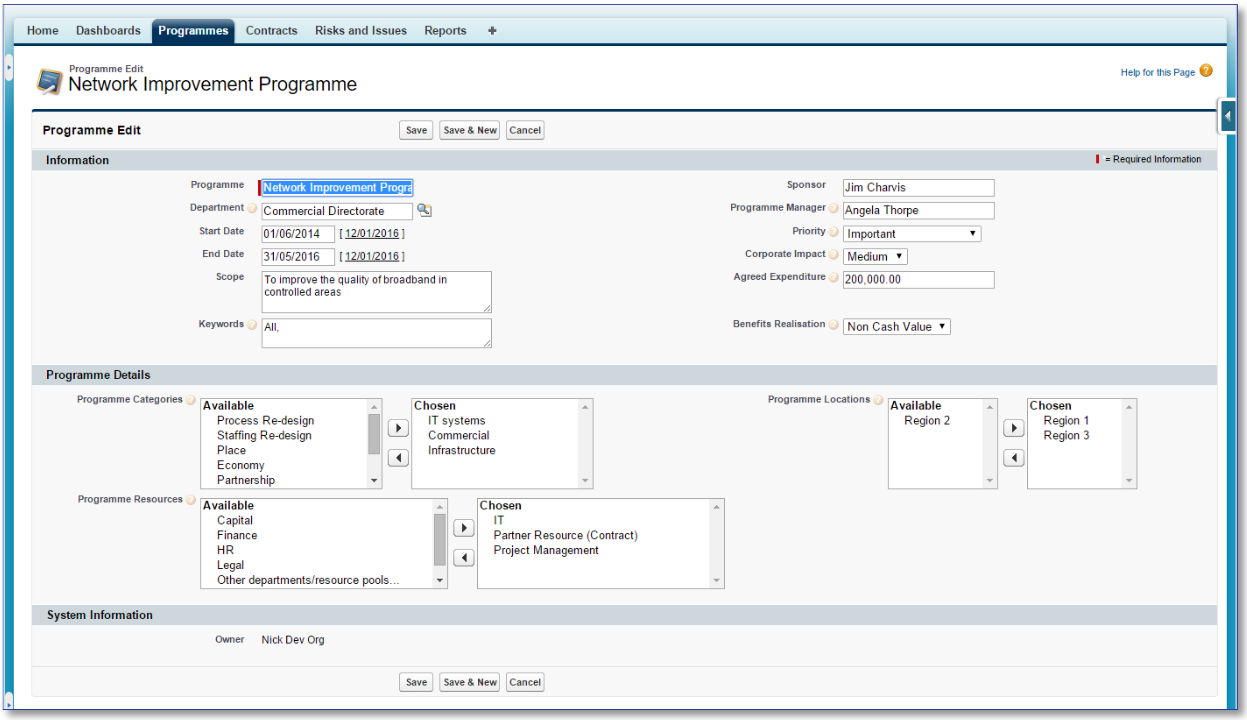


Number	Description
1	On this page you will be able to view: • Projects

	• Contracts • Other engagements
2	The Record Type denotes the linked record type: • Contracts • New Projects • Pre-procurement engagements
3	For clients using the Business case functionality, the associated Business Cases can be found on this page as well.
4	Users can attach relevant documents to the workplan and organise them infolders using the Internal Document Folders

Creating and Editing Programmes

For an introduction to editing and working with data in Atamis 3.0, please refer to the section on Core Features. From the Programmes Tab click **New** to create a new Programme record.



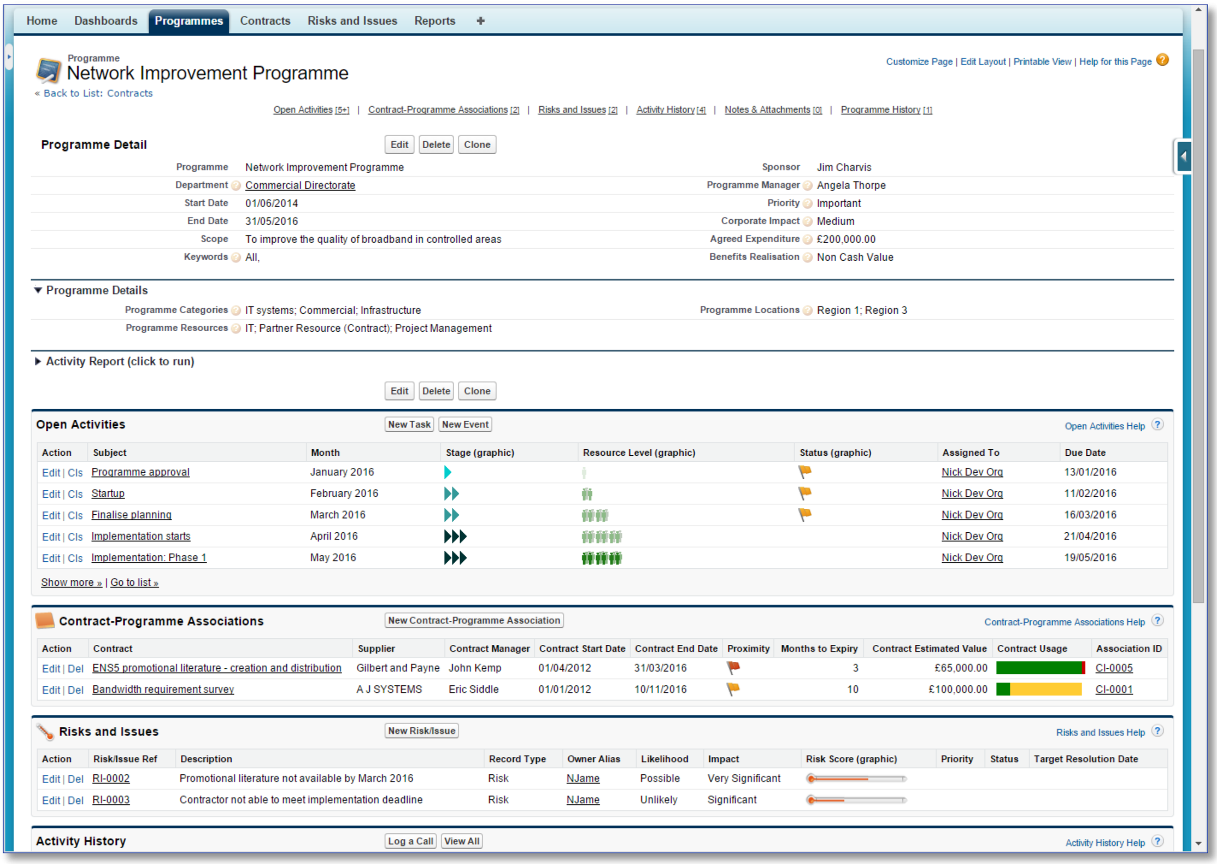
When creating/editing Programmes, note that the fields in the Programme Details Section are multi-select picklists: You can select more than one option from the Available values and move them to the Chosen values using the arrow buttons. Hold Ctrl or Shift while clicking to select multiple values.

The Programme Detail Page

As well as the Programme data itself, each Programme can optionally have:

- Open Activity, for monitoring progress
- Contract-Programme Associations, for identifying dependencies on procurement contracts
- Risks and Issues associated with the Programme
- Activity History
- Notes and Attachments
- Programme History

The full Programme Detail Page is as shown below:



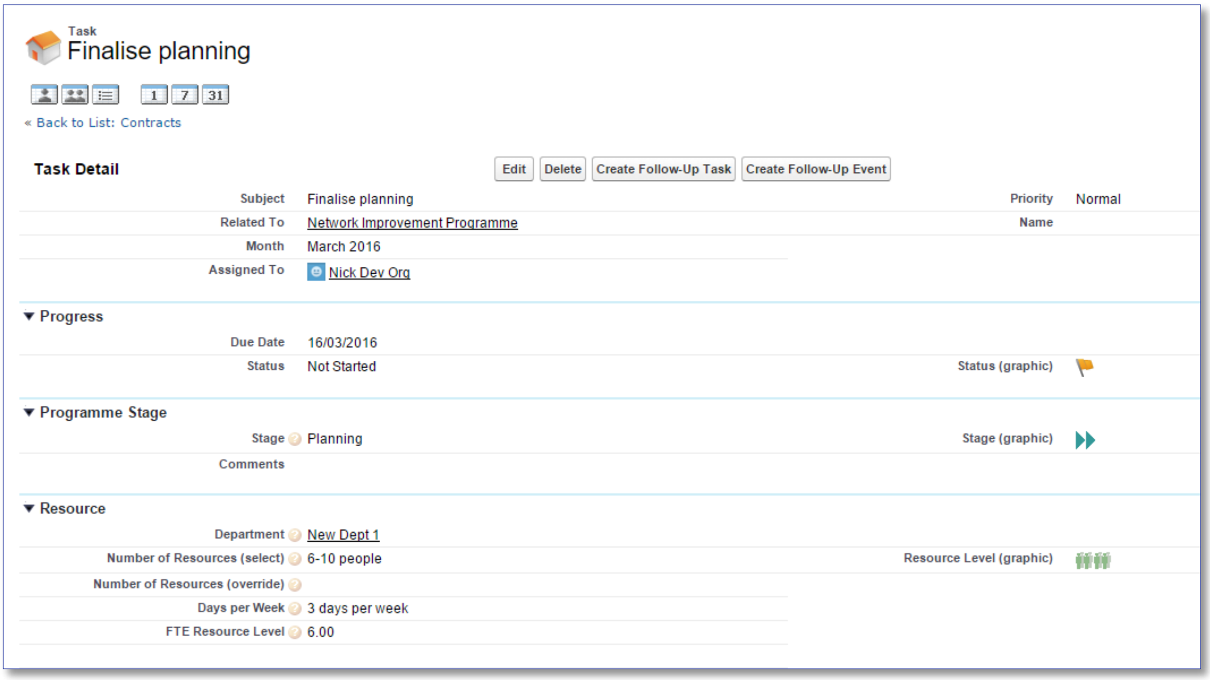
Note that the section *Activity Report (click to run)* when expanded will provide the option to run a Report that will display all current and completed Activity for this Programme. As with all Reports, this data can be exported to Excel if required.

Open Activities and Activity History

Tasks are used in Atamis PM to provide a high level summary of activity progress. The system can be configured for either Monthly or Quarterly progress updates but once set, this convention must be followed for all Programme Activity in the system. Tasks should be created for every period (Month or Quarter) that each Programme is active for.

For an introduction to using *Tasks* and *Events* in Atamis 3.0 please refer to the Activity Management section.

Atamis PM uses custom fields and graphic icons to indicate the Programme’s Progress (i.e. Status), high-level Stage (Concept/Planning/Implementation) and Resource requirements. The Task page is as shown below:



1. It is recommended that a corporate naming convention is agreed for Task Subjects. These can refer to specific phases within each Programme, or could use a more generic convention such as “April 2016 activity”, “May 2016 activity”, etc. or just “Planning”, “Active”, etc. Note that Task subjects do not have to be unique.

2. *Due Date* is mandatory for each Task. Because reporting is done at a monthly/quarterly level you can technically select any date within the month (or quarter) of activity, however, note that: a) reminder alerts will use this date, and b) the field *Status (graphic)* will automatically turn to a red flag after the *Due Date* if the *Status* has not been updated to Completed. It is recommended that you use a date about 1-2 weeks before the end of the month/quarter to alert the Programme Manager in sufficient time to update the Task’s *Status*.

3

Graphic	Notes
(blank)	No flag is shown if there's more than 90 days to the Due Date
	Amber flag shown if within 90 days of the Due Date and Task has not been Completed
	Red flag shown if Task is past the Due Date and has not been Completed
	Green flag shown when Status = Completed
	Used for diary Events (i.e. not Tasks)

4 The Stage picklist field provides a very high-level indication of whether the Programme is at the Concept, Planning or Implementation stage.

Graphic	Notes
	Concept: Programme identified/required but not yet started
	Planning: Resource is being dedicated to planning the detail of Programme
	Implementation: Programme has been fully approved and is under-way
	Decision Required (open): Use when the future of the Programme is undetermined
	Stopped (closed): Use when the Programme is stopped and resources are no longer required

5 The Resource section has the following fields:

a) Department should be set the Department of the resources used in this Task. It is optional but will help with Resource reports if entered. If resources are to be pulled from multiple Departments, you should enter a separate Task for each Department with the appropriate resource levels set for each one.

b) Number of Resources (select) indicates the approximate number of people involved in the Programme for this period (even if they are only working part-time on the Programme)

c) To generate reports the system assumes a default value for the resource level ranges:

   4-5 people uses "5"
   6-10 people uses "10"
   11-20 people uses "15"
   >20 people uses "25"

   If you wish to be more specific, enter Number of Resources (override) and the reports will use your value not the defaults.

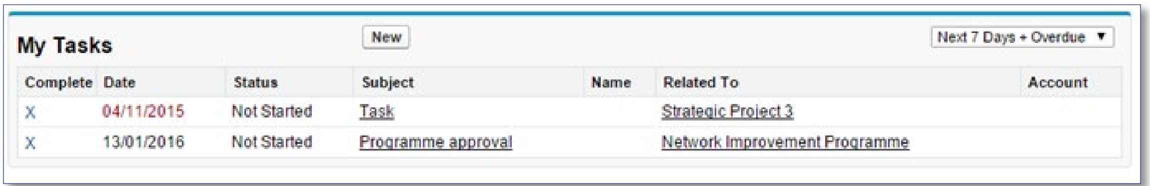
d) Enter Days per Week to provide an indication of the number of days (on average) that the resources will need to work on the Programme for this period. The default value is Full-time.

e) The FTE Resource Level is calculated by multiplying the above two fields using:

   "5%" for Negligible
   "20%" for 1 day per week
   "40%" for 2 days per week
   "60%" for 3 days per week
   "80%" for 4 days per week
   "100%" for Full-time

Updating Progress on Programmes

To keep progress records up-to-date, Programme Managers need to update their Monthly (or Quarterly) Task to set it to Complete. This can be done by editing the Task from the Programme Detail Page. Alternatively, an even quicker method is to have Tasks due in the `Next 7 Days + Overdue` configured to display on your Home Page.



My Tasks | New | Next 7 Days + Overdue

Complete	Date	Status	Subject	Name	Related To	Account
X	04/11/2015	Not Started	Task		Strategic Project 3	
X	13/01/2016	Not Started	Programme approval		Network Improvement Programme	

After logging in, the Programme Manager simply needs to click **X** against the appropriate Task and press Enter (or click **Save**) to mark the monthly activity as complete.

Contract-Programme Associations

Contract-Programme Associations create a link between Contracts and Programmes wherever a Programme is in some way dependent on a Contract. Programmes can be associated with multiple Contracts, and each Contract in turn can be associated with multiple Programmes.

To establish a new association, click **New Contract-Programme Association**, select the Contract using the look-up dialogue box and click **Save**.

When you return to the Programme Detail Page (by clicking on the **Programme Name**), you will see selected fields from the Contract are displayed in the list of Contract-Programme Associations, including the `Proximity` flag which provides an indication of how close Contract is to expiring, and the `Contract Usage` bar which indicates the actual spend as a proportion of the estimated Contract value.

Risks and Issues

Risks and Issues share the same space in Atamis PM but have distinct page layouts associated with them. Each record in this list will have a Record Type or either “Risk” or “Issue” which determines which page layout they use.

Field	Comments	Appears on Risk Page	Appears on Issue Page
Risk/Issue Ref	A unique system-generated code	Y	Y
Record Type	Risk or Issue	Y	Y
Description	Short description of the Risk/Issue	Y	Y
Risk Categories	Configurable multi-select list of the type(s) of risk	Y	Y
Risk Score (graphic)	Sliding scale reflecting Risk Score (%)	Y	
Risk Score (%)	Likelihood * Impact / 25	Y	
Likelihood	Very Unlikely = 1 Unlikely = 2 Possible = 3 Likely = 4 Very Likely = 5	Y	

Impact	Negligible = 1 Minor = 2 Moderate = 3 Significant = 4 Very significant = 5	Y	Y
Risk Locations	Configurable multi-select list of the business or geographical area(s) impacted	Y	Y
Comments	Free-text area	Y	Y
Management Strategy	Configurable picklist of the primary approach adopted to manage the Risk	Y	Y
Mitigation Approach	Free-text area to explain detail of approach used to mitigate the risk	Y	Y
Contingency Plan	Free-text area to explain the contingency plan in the event of the risk escalating	Y	Y
Issue Resolution: Priority	Priority assigned to the resolution of an Issue		Y
Issue Resolution: Status	The current status in resolving an Issue		Y
Issue Resolution: Target Resolution Date	The target date for resolving an Issue		Y

Adding and Escalating Risks

To add a Risk click **New Risk/Issue** select `Risk` from the picklist. Assign the Risk an Impact level and Likelihood level in order for the system to generate the Risk Score. In time, if the Risk escalates increase the Likelihood level, and if the Risk become an Issue simply change its Record Type from "Risk" to "Issue" on the Record Detail Page and then click **Save**. (Note this is option is not available on the Edit page). When you change a record to "Issue" the Risk Score assumes that the Likelihood is 100%.

Notes and Attachments

As with other Atamis Modules, file Attachments and textual Notes can be uploaded/inputted to the Programme record for future reference.

Dashboard

The Contract Risk Profile: Quadrants Dashboard is accessed via the Dashboards Tab, or the "Risk Profile" link within the Contract Management section of the home page.

This is a tool which highlights contracts with potential issues that could arise focusing on potential bottlenecks, leverage and strategic risks along with non-critical issues. This is then further broken down by expenditure and risk, with designated sections of the dashboard for; low expenditure with low risk, low expenditure with high risk, high expenditure with low risk and high expenditure with high risk.

ATAMIS

Atamis TM: Tender Management

To make use of this module you will need access to Atamis TM via a Licence Type of **Enhanced User** or above.

The Tender Management module makes use of the Contract tab for the administration of procurement projects up to the award of the Contract.

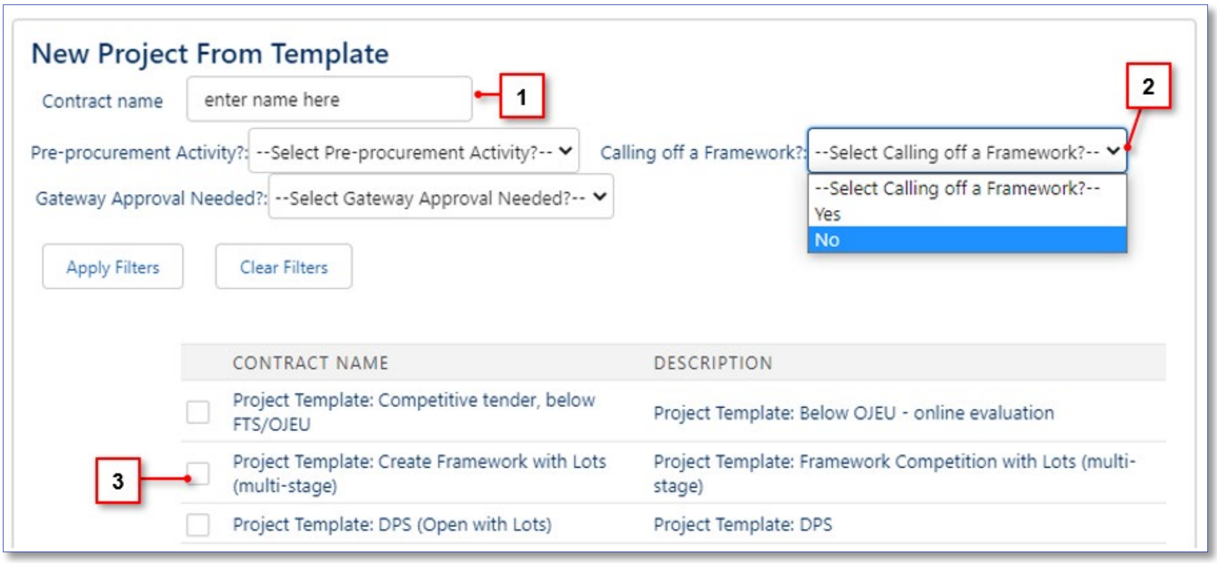
Creating a New Project

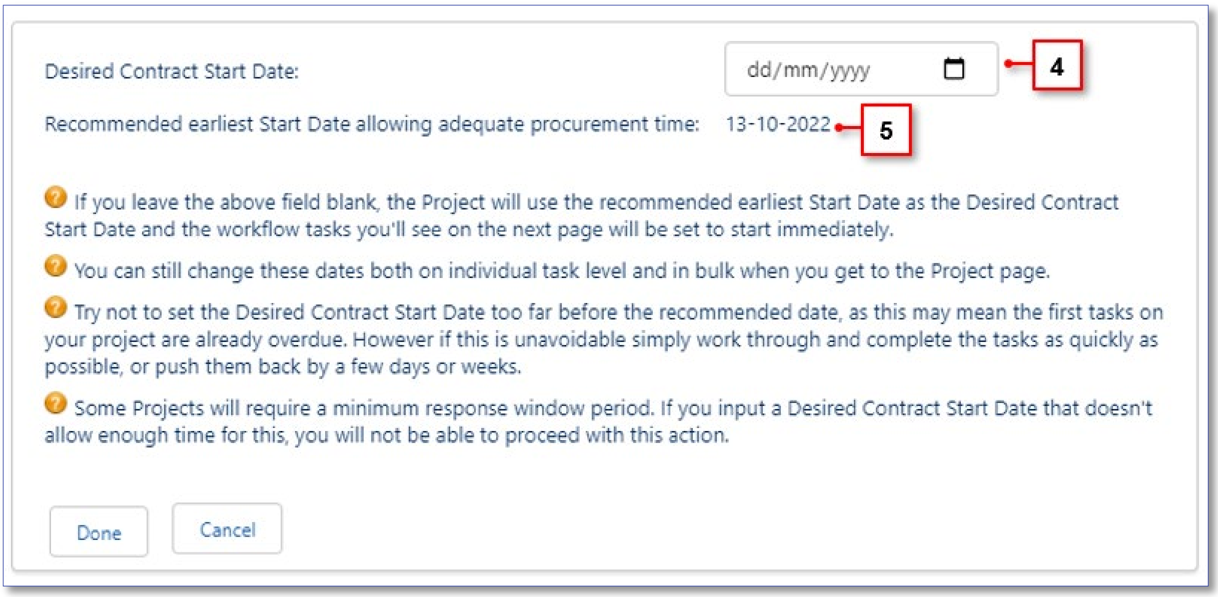
New Procurement Projects can either be created from a Template to benefit from pre-filled information or created as a blank Project.

Creating a Project from a Template

From the Home Page, locate the link and click **Create Project from Template**.

Note: Some Atamis systems can be configured to display a form that is completed with mandatory information rather than displaying the New Project from Template page described below. In this instance, complete the custom fields, click **Save** then click **Assign Template** and continue as below. If you follow this process, filters should be automatically set for you based on the information you entered on the form.





Number	Description
1	Enter the name of your Contract or Procurement Project
2	• If your system has been configured with custom Template Filters, use the picklist fields and click **Apply filters** to narrow the selection of Templates available
3	Select the desired Template by ticking the checkbox and click **Confirm Template**
4	If you enter a Desired Contract Start Date, the dates of the eSourcing tasks will be calculated backwards from that date
5	The system will calculate the recommended Contract Start Date based on the template you have selected. To use the recommended start date, click **Done**

There are two types of Templates that are included in the list of Templates:

- Templates for Calling off a Framework (for mini-competition or direct award)
- Templates for projects of all other types (e.g. ITT, RFP, RFQ, etc.)

If your system is configured to use Templates for *Calling off a Framework*, you will normally be able to identify Templates of this type using one of the Template Filters. If you select a template for Calling off a Framework, you will be presented with additional steps for selecting the Supplier(s) and Lot(s) available on the Framework.

Templates can contain any or all of the following Related Lists which are copied from the Template to your new Project:

- Team Members
- Tasks (the dates are calculated dynamically from your desired contract start date)
- Requirement Sections, Requirements and Picklist Options
- Framework Suppliers and Lots
- Supplier Document Folders and documents
- Internal Document Folders and documents
- FTS/OJEU Notice templates
- Contract KPIs or SLAs

When Assigning a Template, meta data fields on the Template do not override the values on your Project, but with Create New Project from Template, meta data fields on the Template are copied to your Project. If you would like to specify which fields you would like copied from Template to your Project, please contact us.

Creating a Blank Project (not from Template)

To create a new blank Project (without using a Template) click **New** or **New Contract** from the Contracts tab. A page will display the Record Types that you have permission to create. Select *Project* and click **Continue**. Optionally, click **Assign Template** as described above to pull in data from a Template.

Note: Some Atamis systems have been customised so the *New* button may be called something else like: *Start Procurement* or *Create Project*. These options should be clearly marked on the Home Page of your system.

Running a Project – Getting Started

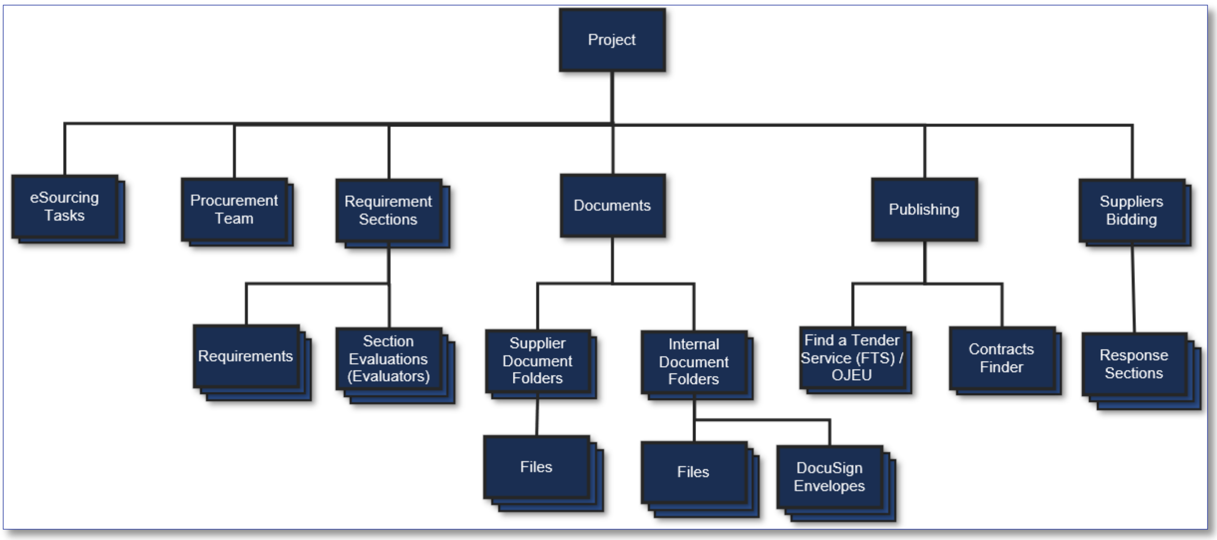
Locate your Project using your preferred method, for example:

- From *My Active Projects* or *Recent Items* on the Home Page
- From the *Recently Viewed* List View on the Contract/Project page
- By searching for the project title in the search bar displayed at the top of the page

To access and complete a procurement project, click on the **Console** tab to display the *eSourcing Console.*

Then follow the guidance provided from the Help icon for each Task. Click **Do Now** to complete the task, or **Next Task** if the task was completed off-line.

When setting up a project, you will need to complete information accessed via a series of Tabs. Most of these tabs (apart from the Console and Details Tabs) contain "Related Lists" represented by this schema:



We can customise the order of the tabs and add additional tabs upon request. Therefore, you may see other tabs, in addition to the ones displayed in the schema above if this has been requested by your organisation.

Console Tab

Number	Description
1	The circles indicate the status of the project, and display the number of: • Tasks to tdo • Team members assigned • Requirements added • Shared documents uploaded • Sites on which the project has been successfully published • Suppliers added and new messages from suppliers • Proportion of completed evaluation
2	The eSourcing task due to be completed next is highlighted. Hover over the Help icon to display custom guidance text for completing this task. If the task has been set up from the template as an action: click **Do Now** and follow the instructions. For tasks without a Do Now link, click **Next Task** when you have completed the task. The system records the date/time and moves on to display the next task.

3	Tasks you have already completed appear filled in on a Timeline.
4	Future tasks that relate to specific eSourcing Milestones, such as the Response Window Opening appear with special icons. Hover over the tasks on the Timeline for further information

Details Tab

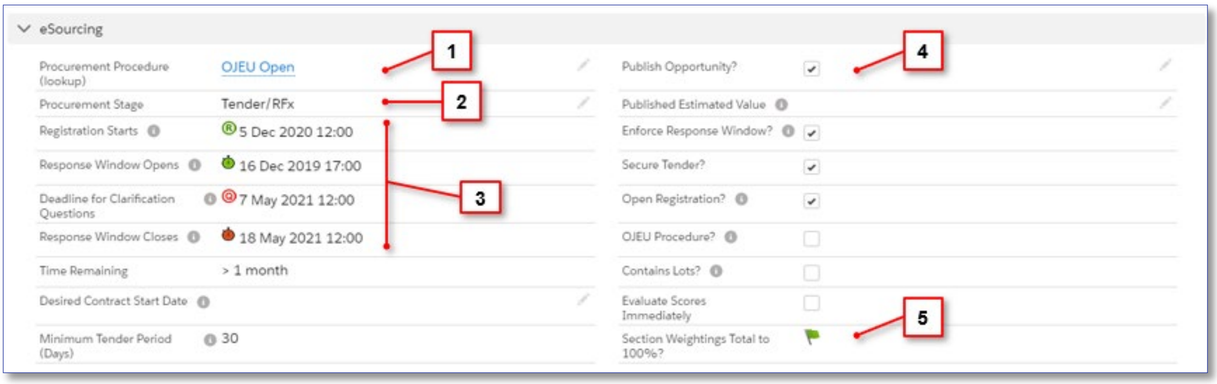
The Details Tab contains a configurable list of meta data fields relating to the Project such as title, description, department and estimated value. The fields used will depend on your configuration.

If your Profile and other Permissions grant you access to Edit rights, click **Edit** or click on the **Pencil icon** next to each field to make changes, then click **Save**.

The Owner defaults to the User who creates the Project. This is also the User that Tasks will be assigned to by default. To change the Owner and reassign all Tasks, click the **Change Owner** icon to the right of the Owner name.

ATAMIS

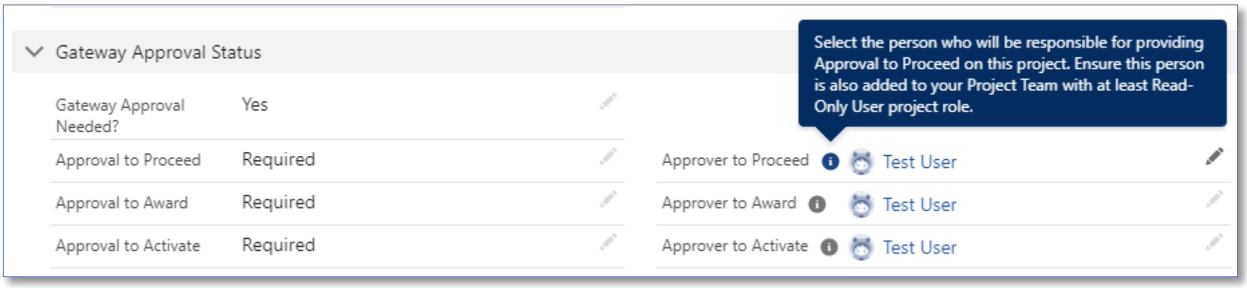
eSourcing Section



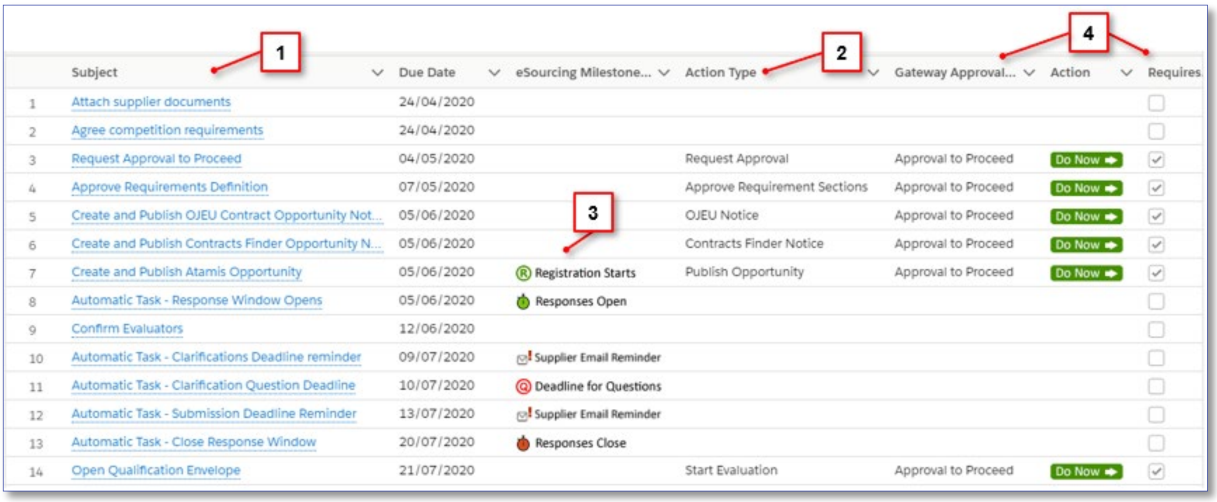
Number	Description
1	The Procurement Procedure determines the characteristics and governance criteria for the procurement and will have been set from the Template used to create the Project. Several fields in the eSourcing section are determined by the Procurement Procedure and are read-only on this page.
2	The Procurement Stage will also have been set from the Template. You should not ever have to edit this field: Single-stage procurement Projects will always have the value Tender/RFx; and in multi-stage Projects (covered in more detail in a separate section) the field is automatically updated by the system.
3	The eSourcing Milestone dates are controlled by updating the Due Date on the task and displayed in this section for reference.
4	When Publish Opportunity? is checked, the Project details will be visible on the Tender Opportunities site provide by Atamis (if configured). The field is set by completing a task of type Publish Opportunity. Unchecking the box will remove the Project from the site.
5	The Section Weightings Total to 100% flag provides an indication of whether the weightings in each of the Approved Requirement Sections total to 100%.

Gateway Approval Section

If used, this section will contain fields that indicate Gateway Approvals that are required *during* the procurement Project. Any number of gateways can be configured. If required by the Procedure you are following, you will need to enter the user(s) who will provide the approval. Approval Workflows are triggered when a user clicks **Do Now** from a Task with `Action Type` of `Request Approval`.



Setting up the Project Workflow or Timeline (Tasks Tab)



	Subject	Due Date	eSourcing Milestone...	Action Type	Gateway Approval...	Action	Requires
1	Attach supplier documents	24/04/2020					
2	Agree competition requirements	24/04/2020					
3	Request Approval to Proceed	04/05/2020		Request Approval	Approval to Proceed	Do Now	✓
4	Approve Requirements Definition	07/05/2020		Approve Requirement Sections	Approval to Proceed	Do Now	✓
5	Create and Publish OJEU Contract Opportunity Not...	05/06/2020		OJEU Notice	Approval to Proceed	Do Now	✓
6	Create and Publish Contracts Finder Opportunity N...	05/06/2020		Contracts Finder Notice	Approval to Proceed	Do Now	✓
7	Create and Publish Atamis Opportunity	05/06/2020	Registration Starts	Publish Opportunity	Approval to Proceed	Do Now	✓
8	Automatic Task - Response Window Opens	05/06/2020	Responses Open				
9	Confirm Evaluators	12/06/2020					
10	Automatic Task - Clarifications Deadline reminder	09/07/2020	Supplier Email Reminder				
11	Automatic Task - Clarification Question Deadline	10/07/2020	Deadline for Questions				
12	Automatic Task - Submission Deadline Reminder	13/07/2020	Supplier Email Reminder				
13	Automatic Task - Close Response Window	20/07/2020	Responses Close				
14	Open Qualification Envelope	21/07/2020		Start Evaluation	Approval to Proceed	Do Now	✓

Number	Description
1	Click on a Task to view its details including guidance on how to complete the task within the system.
2	Some tasks will have a specific Action Type associated with them, in which case you can click Do Now. The system will take you to the appropriate page to perform the necessary system steps. See below for Action Types table.
3	Other tasks will represent a key milestone. These tasks are different from other tasks in that they trigger a change in behaviour of the system automatically after they elapse. There are four in total (not all are required on all Projects): • **Registration Starts:** Suppliers van only register interest in bidding after this date (assuming the Project has been published to the Tender Opportunities page on Atamis Portal) • **Responses Open** suppliers can only start entering their responses after this date • **Deadline for Questions**: suppliers can still ask clarification questions after this date but the system will display a warning message saying that a reply is not guaranteed as the deadline has passed

	• **Responses Close:** suppliers cannot update their tender response after this date
4	Some tasks require the User to be an Approver on the Procurement Team to finalise the task or will be dependent on Gateway Approval being granted before they can be completed.

The default tasks, timescales and assignments are set from the Template, but users can add their own tasks or modify the Due Date field to reschedule the task, or change the Assigned To field to re-assign to another User. Click Edit to edit these and other details.

Although optimised for eSourcing features, tasks in Atamis TM operate using the same Activity Management feature used elsewhere in Atamis 3.0 and will integrate with Outlook if required. See the Activity Management section for more detail.

Action Types

Below is a list of available Procurement Tasks of type `Action Type`.

Action Types	Notes
Approve Requirement Sections	Completing this action type will approve the Requirement Sections set up on the Project. Supplier cannot be invited or register interest until the Requirement Sections are approved.
Publish Opportunity	Completing this action type will make the opportunity publicly available for suppliers to view and register their interest.
FTS/OJEU Notice	The user can draft a Contract Notice to submit to Find a Tender Service (FTS). Depending on the Procurement Procedure, the user can also publish the notice on the Official Journal of the European Union (OJEU).
Contracts Finder Notice	The user can draft and publish a Notice on Contracts Finder.
Suggest Suppliers	The system will use the Category associated with the Project and suggest suppliers that match that category. Suppliers will not be invited or emailed at this stage.
Add Suppliers	This action type will allow the user to search for suppliers portal accounts or set up new suppliers with a Portal Account and add them to the Project.
Invitation	The user can invite the suppliers added to the project to respond to the opportunity.
Email	Use this task to send a message/email to all or selected bidders. Emailing suppliers can also be done via the Message Centre, but the user can be prompted of sending an email, by adding it as a task.
Issue an Amendment	If the users need to add or change any requirements during a Live Project, they can use this action type.
New Procurement Stage	Used on multi-stage projects, this action type will move the Project from one project stage to another.
Start Evaluation	Upon closure of the Response Window, the user will be able to start the evaluation process and notify Evaluators using this action type. Evaluators must first be assigned records to evaluate before completing this action.

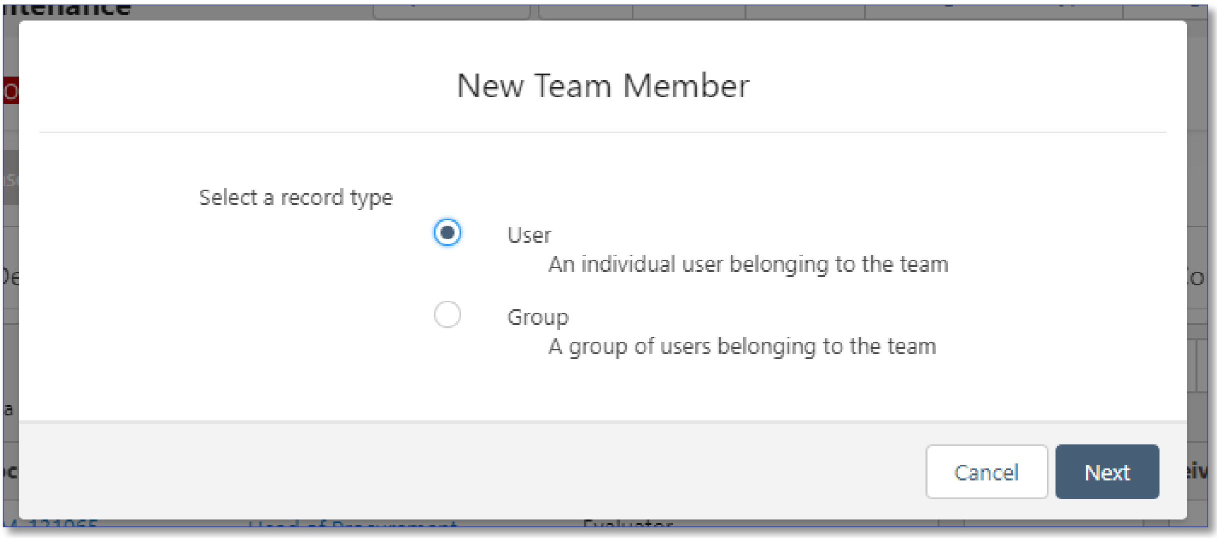
Evaluate Scores	When all Evaluators have completed scoring all responses, completing this action type will calculate the overall score totals. This action should be repeated to re-calculate totals whenever Evaluator scores or Override scores are entered.
Award	The user can use this action type to award the contract to the successful bidder.
Request Approval	If the project contains tasks which require approval to proceed, the users can request approval to proceed by completing this task.

Setting up the Procurement Team (Team Tab)

Procurement Team

Team Members can be set up for each Procurement Project, either individually or in pre-configured groups of users. Depending on your system data security configuration, user permissions and roles may be controlled at a project level by applying Team Sharing Rules.

To add a Team Member, click **New** from the `Team` related list, select User or Group, click **Next**, complete the form, and click **Save**.

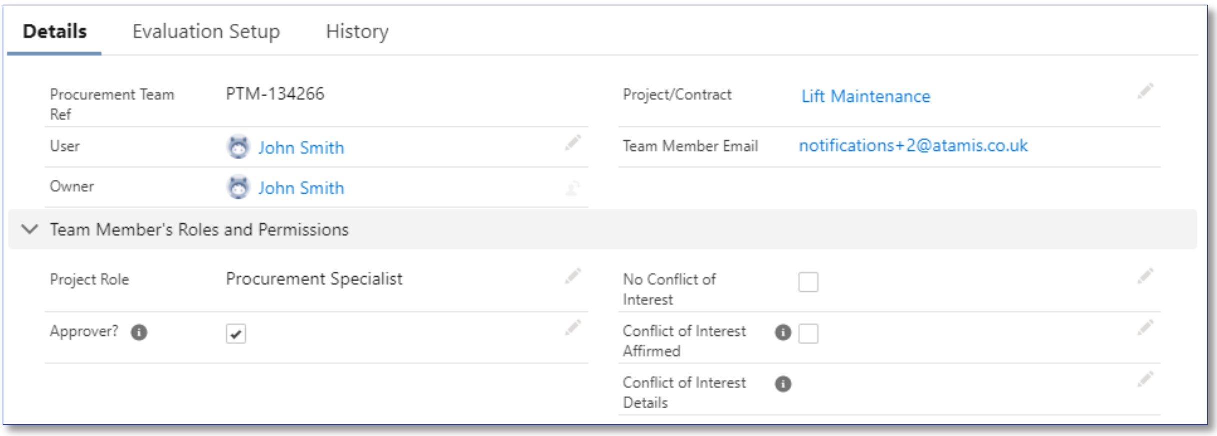


Users

Users can be assigned a Project Role. By default, this field is for information purposes only, but configuration can be applied to make this value determine the Team Sharing Rules automatically.

Users can be assigned as an Approver. Users with this setting will be able to complete Do Now Actions on the Task List that have the property Requires Approval.

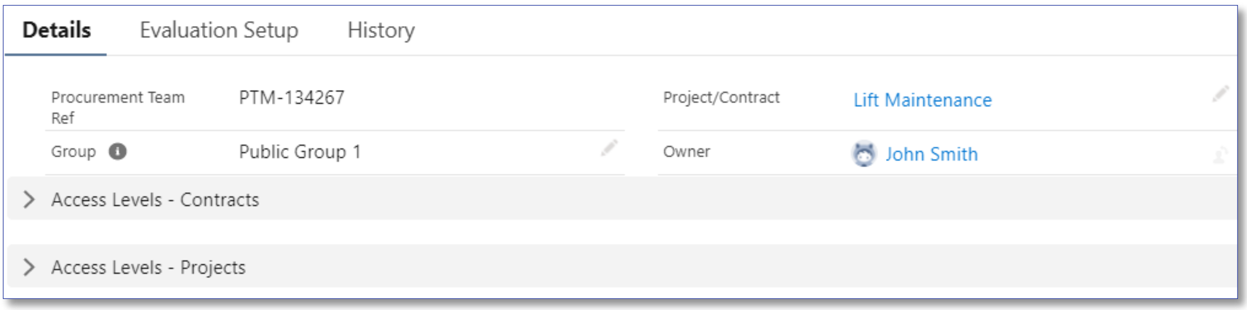
The Users Team Member page will display whether the Team Member has provided confirmation that they have No Conflict of Interest with any of the Suppliers Bidding when they start to evaluate responses. If the Team Member has a conflict of interest, the system will enable the user to provide more details, and these will be displayed on the page for the procurement team to review.



Groups

The feature for using Team Group Members will only be activated if your system has been configured with Public Groups as part of the User Administration set up. Assigning users membership of Public Groups is one method of controlling access to data records.

If configured, your Public Groups will appear in the Group picklist field, and Team Sharing Rules will be applied to all Users that are members of the specified Public Group.



Team Sharing Rules

The Team Sharing Rules are governed by the fields detailed below and control the team member's level of access on the Project.

Access Level Field	Notes
General Access to Project/Contract	Grants access to the Project Details fields, Requirements and Publication Notices; "Full" access allows the user/group to add, edit and delete
Access to Team Members	Grants access to the Team tab; "Full" access allows the user/group to add, edit and delete
Access to Supplier Document Folders	Grants access to the Documents tab; "Full" access allows the user/group to add, edit and delete
Access to Suppliers Bidding	Grants access to the Suppliers tab; "Full" access allows the user/group to add, edit and delete
Access to Supplier Messages	Grants access to Dialogues to/from Suppliers Bidding; "Full" access allows the user/group to create messages and respond to suppliers
Access to Evaluation Scoring	Grants access to Evaluation Scoring records: Score only where evaluating permits a user that has been added as an Evaluator to score the questions they have been assigned but not see any other Evaluators' scores; if none assigned, the user will not see any Responses or Evaluation Score details View all scores permits a user/group read-only access to all Evaluator scores in the Project Edit/override all Evaluator Scoring grants a user/group the ability to modify all Evaluators scores and comments on the Project
Access to Responses and Moderation Scoring	Grants access to Response records for the purposes of Moderation: View responses where evaluating permits a user that has been added as an Evaluator to see the Responses to the questions they have been asked to score after the Start Evaluation action has been run

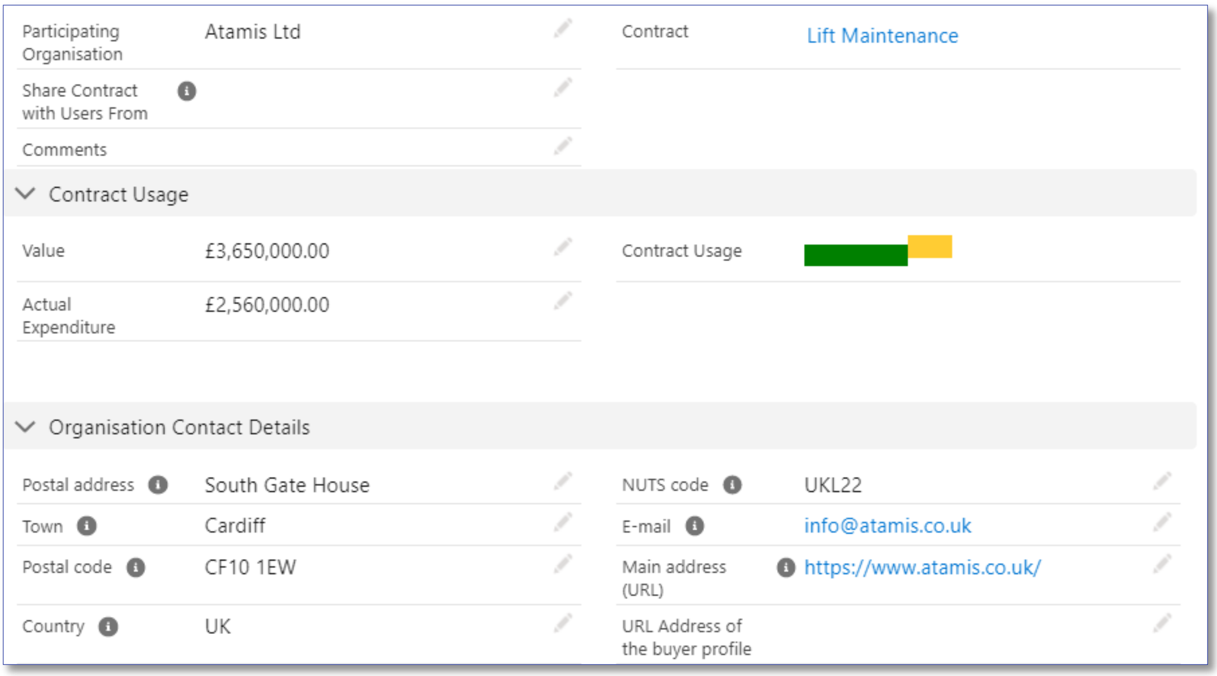
	View all responses when available permits a user to see all Responses after the Start Evaluation action has been run Moderate all when available permits a user to enter moderation scores and comments after the Start Evaluation action has been run and Evaluators have finished scoring.
Receive Message Alerts from Suppliers?	Team members with this setting will receive a notification email whenever a Supplier Bidding on the Project sends a Message through the Message Centre.
Nominated to Open Tender Box?	For Projects following a Procedure with the Tender Box Opening Procedure set to Secure Tender Box, this field indicates whether the Team Member has been delegated responsibility for entering Lock Keys and Unlock Keys to secure and open the tender box.
Lock Key Held	For information only when the box above is checked, to remind you of which Lock Key and Unlock Key a Team Member should use.

Note: If your system has Team Sharing Rules enabled, the user must be a Team Member to own and action an eSourcing task. Otherwise, eSourcing Tasks can be assigned to any user – they do not have to be on the Procurement Team.

Contract Participants

If you're collaborating with other buying organisations over the creation of your contract, you can use the Contract Participants list to record the name of the organisations, and the anticipated usage (in local currency) of the contract.

To create a new Contract Participant, click New from the Contract Participant related list and complete the name and value.



Published Contracts

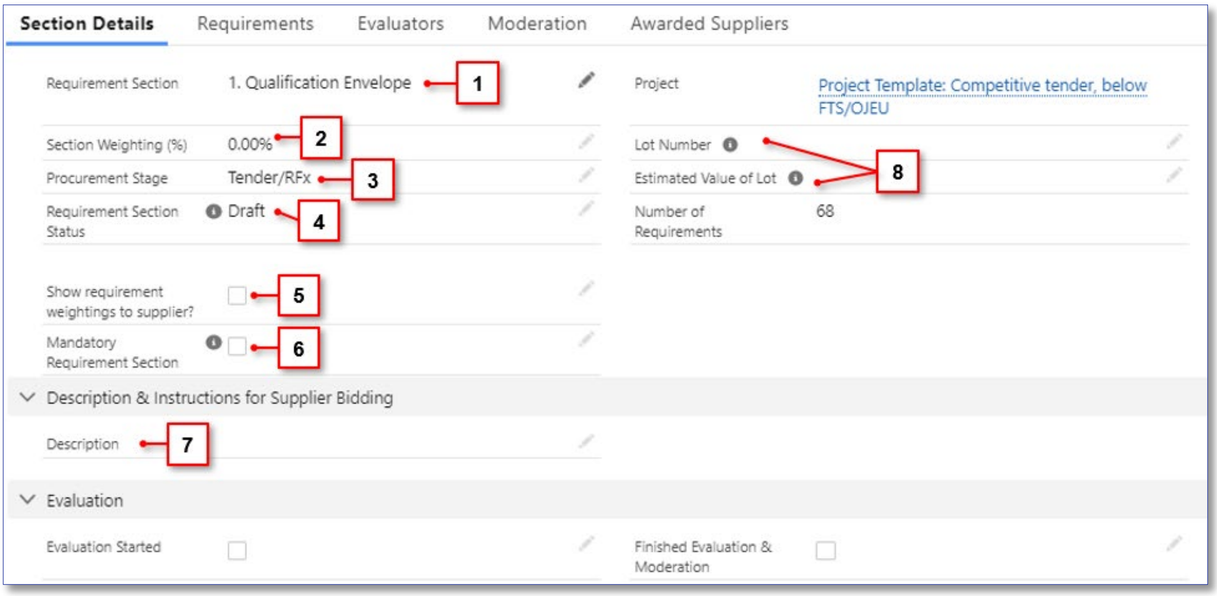
This related list will display the details of the published opportunity on to the Opportunities Page on the Atamis Portal. The records on this list are automatically created when the user is completing a task of action type **Publish Opportunity.**

Setting up Competition Requirements and Evaluators (Requirements Tab)

In Atamis TM, the criteria, or questions, you request from prospective suppliers are known as Requirements. Requirements are grouped into Requirement Sections, e.g. Cost, Quality, etc. An eSourcing Project must have at least one Requirement Section, and each Requirement Section must contain at least one Requirement. If you are using the evaluation features, you'll also need at least one Evaluator for each Requirement Section.

Setting up Requirement Sections

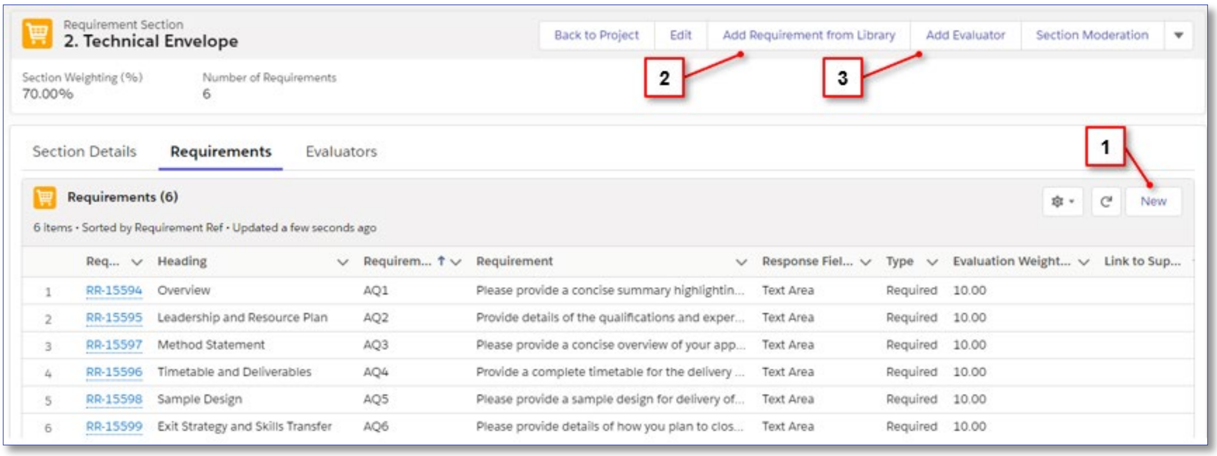
To create a Requirement Section (), from the Requirements tab click **New**. Complete the required fields and click **Save**. These fields can be edited later from the Section Details tab of the Requirement Section page.

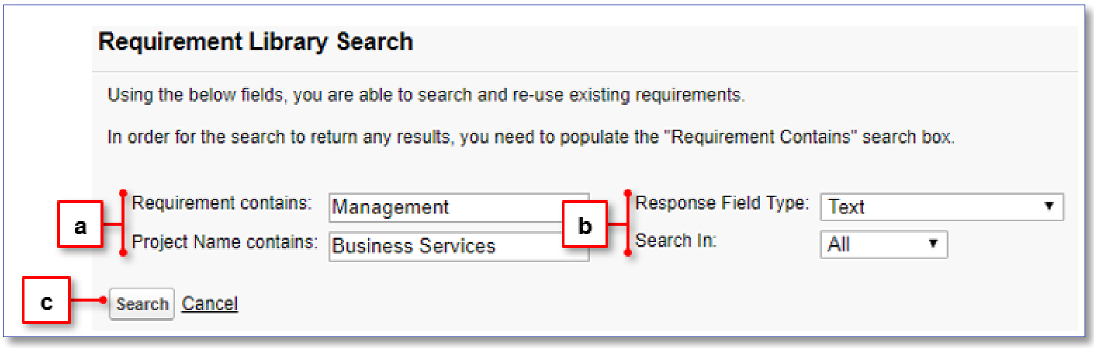


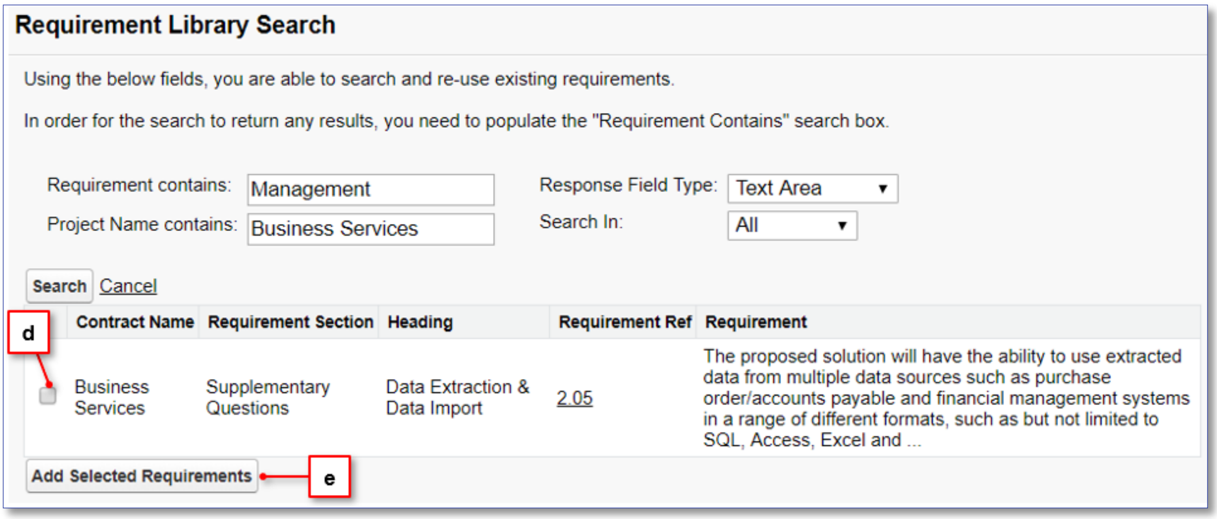
Number	Description
1	If your Project has many Requirement Sections, it is recommended that you insert a letter or number before the name to ensure Requirement Sections are ordered consistently.
2	The Section Weighting is used to calculate the overall score for each supplier. The Section Weightings Total to 100% flag on the Project page will be set to red if the Section Weighting of all approved sections do not

	total to 100%. Ensure that the weighting of all approved requirement sections total 100% unless you are doing a project with lots.
3	For single-stage Projects, the Procurement Stage should be set to Tender/RFx. For multi-stage Projects you should use this field to indicate which stage each Requirement Section relates to.
4	The Requirement Section Status will be set automatically by the system as the Project progresses through key milestones. The values are: • Draft: Requirements can be added and modified (default value) • Approved: Requirements have been finalised and ready for distribution to suppliers (set by a Do Now action called Approve Requirement Sections) • Archived: All Supplier Responses have been received and evaluation is either underway or complete (set by a Do Now action called Start Evaluation)
5	The weighting of every requirement within a section can be displayed on the Supplier Portal by checking this box.
6	This is applicable to procurements with lots. By checking this box, you are making this Requirement Section mandatory. Suppliers will not be able to submit their responses to the other sections unless they submit this section as well.
7	The Description text will be visible to suppliers via the portal and can be used to provide instructions on how to complete the Requirements.
8	If your Procurement is divided into Lots, and this Section represents a Lot, enter the Lot number in text format, e.g. “Lot 1” and the Estimated Value of Lot. This information will later on be used when publishing FTS Notices.

Setting up Requirements







Number	Description
1	To add requirements manually click New
2	To save time with common questions, click **Add Requirements from Library** to copy requirements from another project by searching with keywords. a. Enter the keywords related to your requirements and the project containing the requirements you need. Use quotations marks for an exact search on the Project name b. Use the drop-down list to select the response type (i.e. picklist, text area or all) c. Click **Search**. This will bring up a list of requirements that match your search. d. Tick the box related to the requirements you want to copy e. Click **Add selected Requirements** when you are ready to import them on to your project
3	To assign Users who are to conduct the evaluation of some or all requirements of this section, click Add Evaluator. You can also assign evaluators from the Team Tab and from the Evaluation Status page.

The Requirement page contains a set of fields which can help you create your requirement. The table below contains a list of the available fields and their intended purpose.

Requirement Field	Notes
Heading	Headings are a convenient, but optional, way of grouping Requirements together. The `Heading` will appear to suppliers in the Supplier Portal. You can also use this as a reference to delete requirements in bulk.
Requirement	The full-text description of the question you wish suppliers bidding to answer (up to 32,000 characters).
Requirement Ref	Each Requirement must have a `Requirement Ref` which is used by the system to display the sort order in the Supplier Portal. If you have many Requirements in a Requirement Section, it is recommended you use the convention 01.01, 01.02, etc. or A.01, A.02, etc. rather than 1.1, 1.2, as the sorting is alphabetical, not numerical (for example, 1.10 will appear before 1.2 in a sorted list)
Type	There are three Types of Response: `Optional`: appears to suppliers in the Supplier Portal as "Optional" and is a question which does not have to be answered to submit their tender. This type should be used for dependent questions, e.g. "If you answered 'No' to Requirement A.23, please provide details". Note that the system cannot validate Responses to dependent Requirements. `Required`: appears to suppliers in the Supplier Portal as "Required" and is a question which must be answered. Suppliers will not be permitted to submit their response if one or more required requirements have not been completed. `Pass/Fail`: appears to suppliers in the Supplier Portal as "Required" (not as "Pass/Fail") and is a question which must be answered. If a supplier Fails on one or more Requirements, the

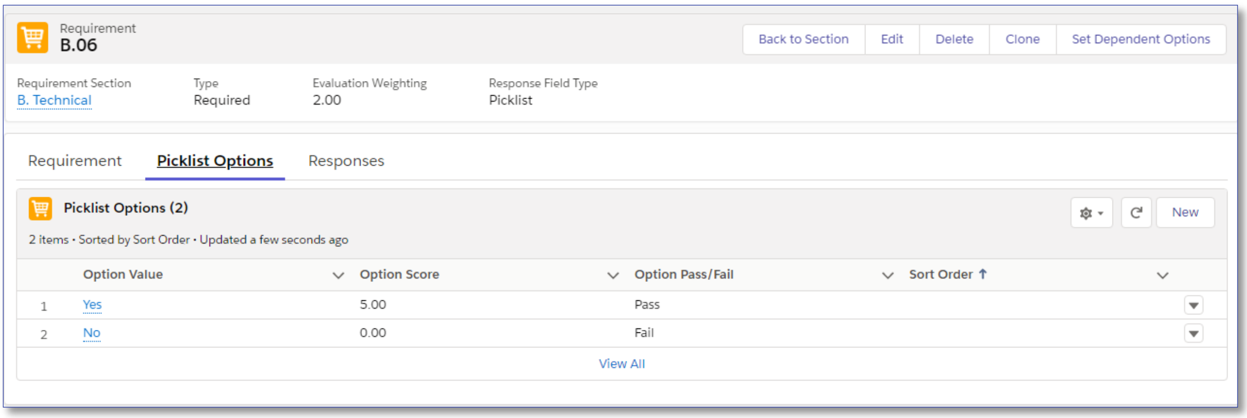
	evaluation pages and reports will highlight that the supplier is not compliant and should be disqualified from the process. During evaluation, Evaluators will be made to answer `Pass` or `Fail` for Responses to Pass/Fail Requirements. Evaluators can still enter an Evaluation Score on a Pass/Fail Response if required. For auto-scoring, only Requirements with a *`Response Field Type`* of `Picklist` and with completed Requirement Options can be automatically set by the system as Pass or Fail.
Response Field Type	This field determines the type of Response the Supplier is asked to provide. Valid values are: `Text`: up to 255 chars, text box appears as a single line in Supplier Portal `Text Area`: up to approx. 30,000 chars of plain text in a large text area `Rick Text Area`: up to approx. 100,000 chars of formatted text including option to insert images `Picklist`: picklist values are added as Requirement Options (see below) and can be used for auto-scoring in evaluation `Checkbox`: Checked (True) or unchecked (False) options only `Number`: any number with up to 16 digits and 2 decimal places `Currency`: any number with up to 16 digits and 2 decimal places

	`Attachment`: allows multiple document attachments up to 2GB each and facility for adding multiple Notes (free text comments) `Date`: allows the entry of a date format response `Multi-Select`: allows the supplier to select multi options from a set list `No Response`: no response is required from bidders
Currency Auto-Score Method	Can be set to `Relative to Lowest Price` or `Relative to Scaler` when *`Response Field Type`* = Currency.
Scaler	Users can define a scaler value on a field called `Scaler` located on the requirement page. During the evaluation process, the score of the supplier for that requirement will be generated taking into consideration the defined scaler.
Character Limit for Response	Can be set to any number up to 32,000 when *`Response Field Type`* = *`Text Area`*. Character limits cannot be used for Rich Text Area.
Requirement URL	Optional: if the question refers to an external web link, enter it here.
Requirement URL Appears as	Optional: if using the field above, enter the text you would like to use that will as a hyperlink to the supplier.
Evaluation Max. Score	Any maximum score can be applied. The `Maximum Score` will be visible to Evaluators, but not Suppliers

Evaluation Weighting	Any weighting can be applied as a number. Weightings can be considered as percentages if desired, but do not need to total 100 as the evaluation calculation applies each weighting relative to other Requirements in the same Requirement Section. The `Weighting` field will be visible to Evaluators, but not Suppliers. If you wish to make weightings visible to suppliers, you can use the *`Show requirement weightings to supplier?`* Field located on the Requirement Section page.
Evaluation Scoring Guidelines	The `Evaluation Scoring Guidelines` field will be visible to Evaluators but not Suppliers
Dependent Requirement	Optional: Use this field if your Requirement is Optional, but becomes mandatory dependent on how a supplier answered another Picklist question. Select the system record number of another Requirement that must be in the same Requirement Section and have `Field Type` = Picklist.
Dependent Picklist Value	Optional: If the above field is being used, this field must contain dependent Picklist (the drop-down value). Click on button **Set Dependent Options** to select picklists. When the supplier selects this picklist on the dependent requirement, the current requirement will be mandatory for submission.
Picklist Evaluation Scores	Optional: If Evaluators are to score the responses using pre-set values from a picklist, enter the picklist scoring options here with a line-break between each one.
Link to Supplier Field	Optional: If the question is part of a standard questionnaire and this field exists on the Supplier page, this field contains the unique API name of the Supplier field that data will be saved to for future Projects. This can also be used to store information in fields on the *`Supplier Assessment`* area. This field is for Atamis Sys Admin use only and is normally pre-configured on Templates.

Setting up Picklist Fields and Auto-Scores (Requirement Options)

For Requirements with a `Response Field Type` of `Picklist`, create the Picklist Options (drop-down values) by clicking **New** from the Picklist Options tab of the Requirements page:



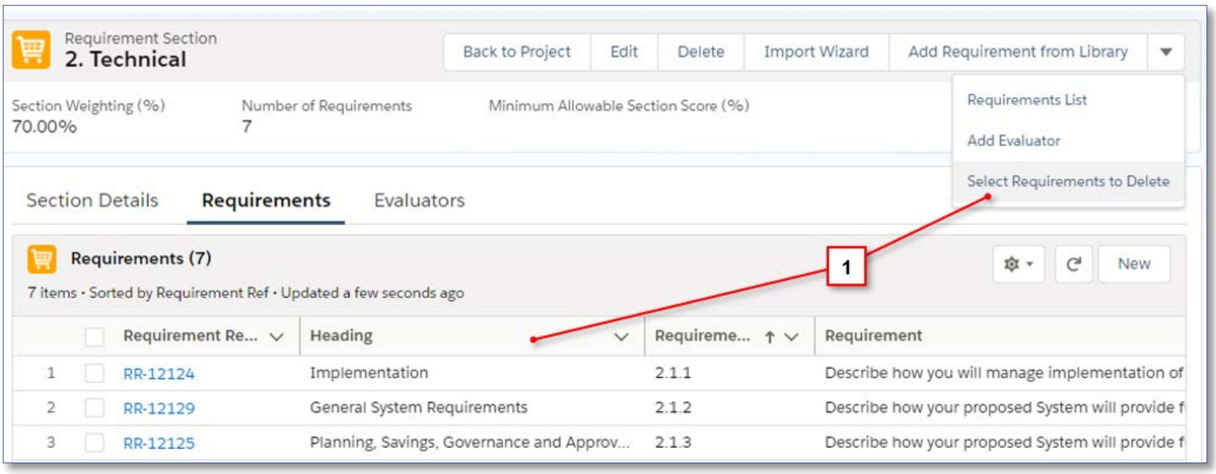
If you enter `Option Score` and `Option Pass/Fail`, the system will automatically score the responses at the Start Evaluation stage. The Sort Order field allows you to sort the display order of the picklist values to suppliers.

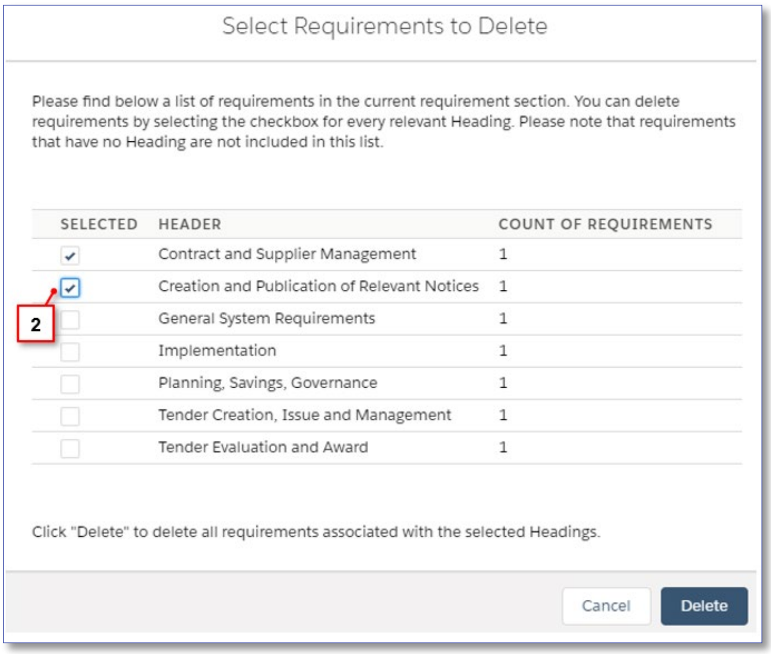
Tip: if you regularly have requirements with, for example, Yes/No outcomes, or Options 1 – 5, create a Procurement Template with these details to save having to enter Requirement Options every time, or use Add Requirement from Library.

Delete Requirements

To delete requirements, you can click on **Delete** buttons available on the page.

If you need to delete specific requirements within a section, open the requirement and click **Delete**.





Number	Description
1	You can delete requirements in bulk by clicking on **Select Requirements to Delete** buttons
2	This action will group all the requirements within current section by header. Check the box for every header and click Delete. This action will delete all requirements within the current requirement section that have the selected hearder.

Approving Requirement Sections

Requirement Sections must be set to a status Approved before you can start sharing Requirements with suppliers. To approve Requirement Sections, locate (or create) a Task with an Action Type of Approve Requirement Sections and click Do Now. Select the sections to approve and click Done.

Once Requirement Sections have been approved you will not be allowed to make changes to the Requirements. If in some circumstance amendments need done to the requirements, these need to be communicated to the bidders and locate or create a task of Action Type Issue an Amendment.

Adding Evaluators

To assign Users as evaluators for a Requirement Section, click Add Evaluator from the top of the Requirements Section page. You can assign evaluators from the Procurement Team page as well by clicking on Add Evaluator.

Select Evaluation Team

Please select users from the procurement team who will be responsible for scoring all responses in this section. If you wish to limit the responses any team members should be responsible for scoring then please uncheck 'score all requirements?' for that team member.

☑	Name	Project Role	Score All Requirements?
☑	Test Team Member 2	Project Lead	☑
☑	Test Team Member 3	Procurement Team Member	☐
☑	Test Team Member 4	Evaluator	☐

Confirm Cancel

By default, Section Evaluators are expected to score all Requirements in the Requirement Section. You can, however, assign only specific requirements to evaluators. To do so, uncheck the box Score All Requirements? and click Confirm.

Select Requirements

Please indicate which requirements the each procurement team member will score.

Name	Role		Requirement Ref	Requirement Heading	Requirement
Test Team Member 3	Procurement Team Member	☐	1.01		Definition
		☑	1.02		Duration
		☑	1.03		Mission Statement
Test Team Member 4	Evaluator	☑	1.01		Definition
		☑	1.02		Duration
		☐	1.03		Mission Statement

Create Cancel

Select one or more requirements for each evaluator by checking the box related to each requirement and click **Create**.

Tip: Evaluators won't be notified or prompted to complete their evaluation until the evaluation process has started. If you'd like to ask people if they're available for do the evaluation, try using the Discussions tab.

Managing Shared and Internal Documents (Documents Tab)

Documentation can be shared with invited suppliers via the Atamis Supplier Portal by uploading files to a `Supplier Document Folder`. Documentation that is only for the attention of the buying organisation is managed in `Internal Document Folders` (also referred to as `Contract Document Folders`).

Internal Document Folders can also be used for processing DocuSign Envelopes and for sharing files with the awarded Supplier.

Both Shared and Internal Document Folders are maintained from the Documents tab of a procurement Project.

Note: Documents attached to Supplier Document Folders have a file size limit of 25MB. Files added to Internal Document Folders have a file size limit of 2GB.

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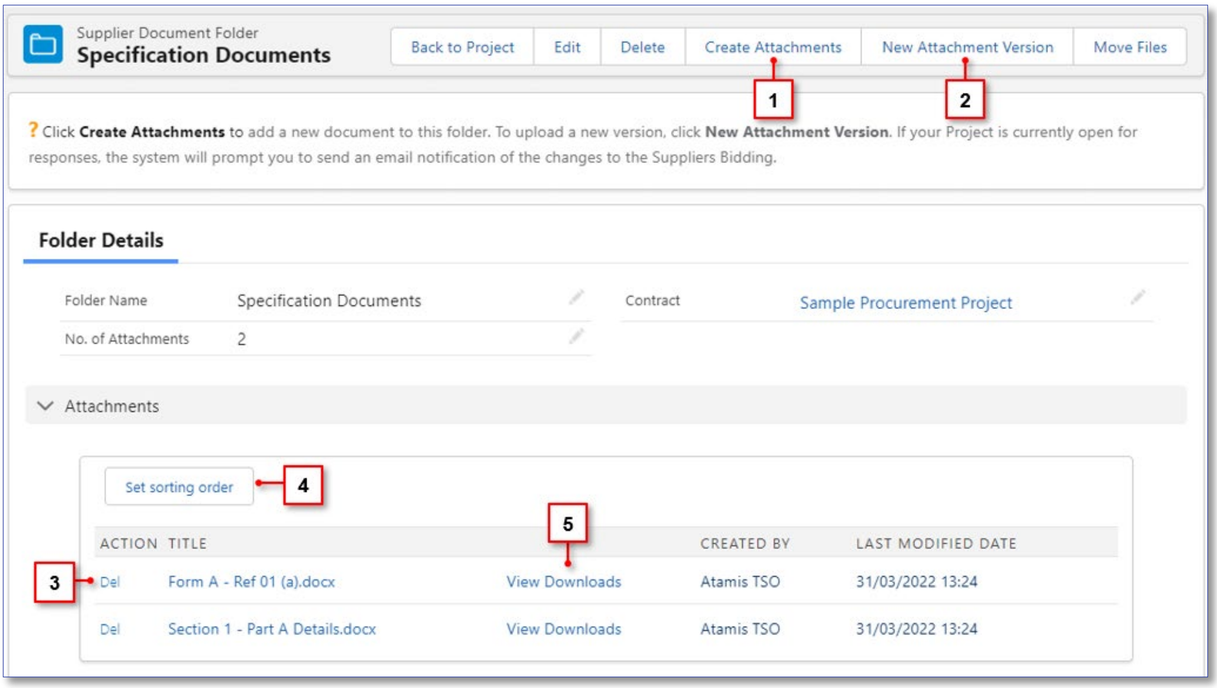
Supplier Document Folders

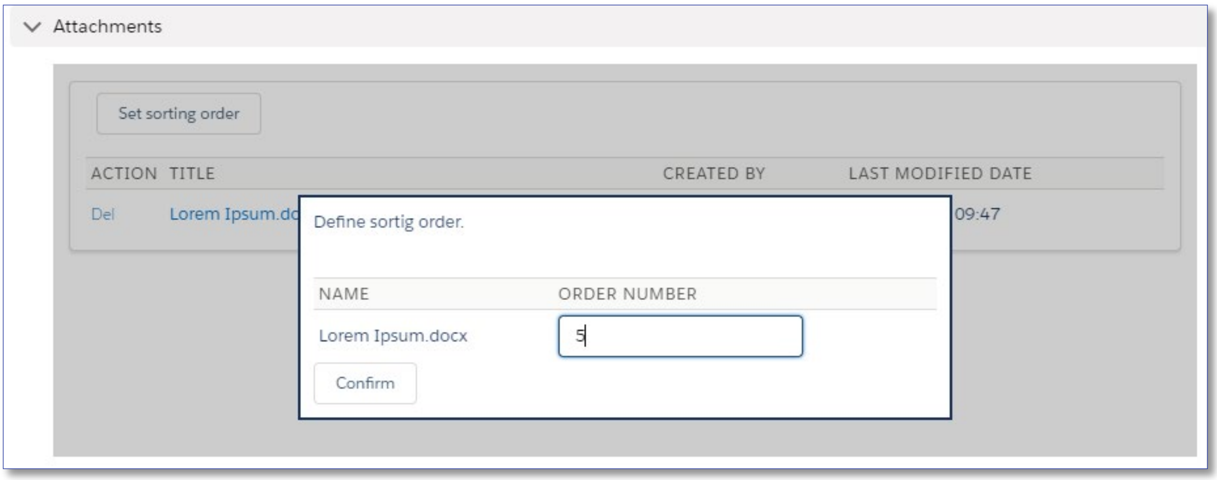
Supplier Document Folders are copied from Templates, along with their document contents, for example, standard tender instructions to suppliers.

To create a Supplier Document Folder, click **New** from the Supplier Document Folders related list. Give the Folder and name and click **Save**.



Number	Description
1	To add documents to the folder, from the Shared Documents Folder page, click Create Attachments, select the documents, and click Done. **Note**: if you upload or update a document in a Supplier Document Folder during a procurement project's Response Window, you will be automatically given the option to message the Suppliers Bidding to alert them of the change. The email notification the supplier receives will include the name of the document.
2	This action will group all the requirements within current section by header.

	Check the box for every header and click Delete. This action will delete all requirements within the current requirement section that have the selected hearder. 2 To upload a new version of a document, click New Attachment Version, select the document, and click Done. The new version will be uploaded, and the old version retained but with the prefix ARCHIVED added to its title.
3	To delete a document, click Del next to the document name. This will also remove the download history. See section on Recycle Bin for restoring files accidentally deleted.
4	Files are displayed alphabetically, however the user can set a custom order of files by clicking on Set sorting order.
5	The system keeps a record of when suppliers download each file from these folders. From the Shared Documents Page, click View Downloads to see who has downloaded a file and when.



Internal Document Folders

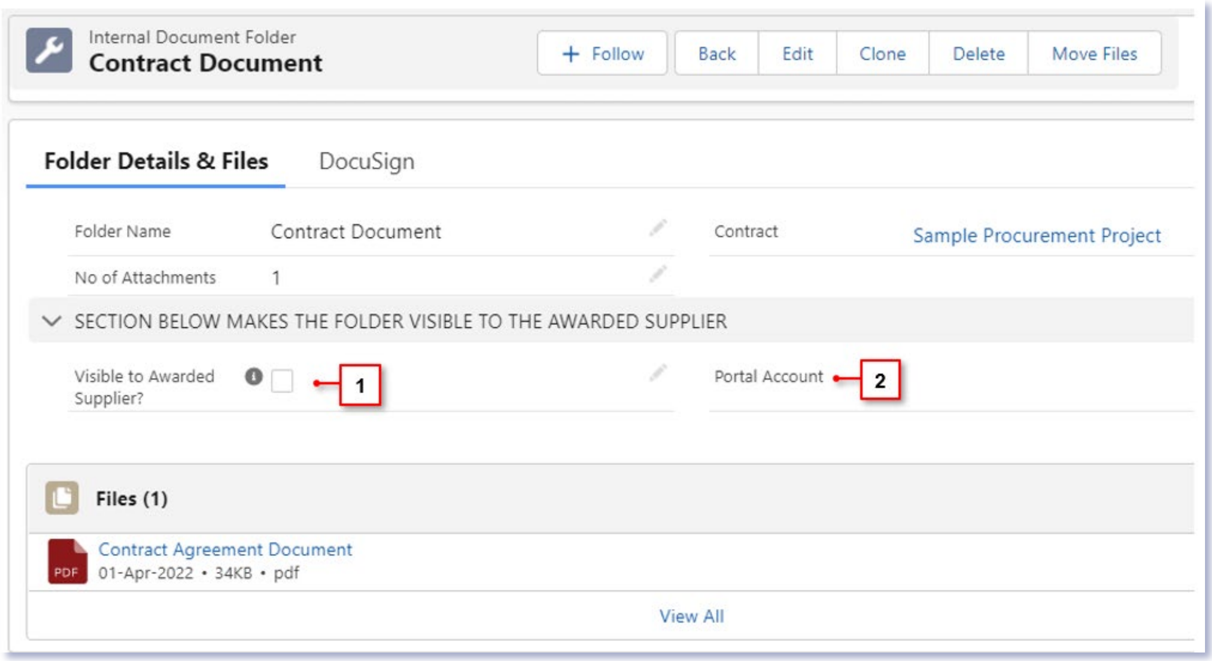
To create an Internal Document Folder for files that are not to be viewed by Suppliers Bidding, click New from the Internal Document Folders related list. Give the folder and name and click Save.

To add documents to the folder, from the Internal Documents Folder page, click Add Files, select the documents, and click Done.

Sharing Internal Document Folders with the Awarded Supplier

Internal Document Folders can optionally be shared with the awarded supplier but not to all Suppliers Bidding.

To share all documents in a folder with the awarded supplier, firstly, from the Contract Award section of the Details tab, select the awarded supplier in the Supplier field and click Save.

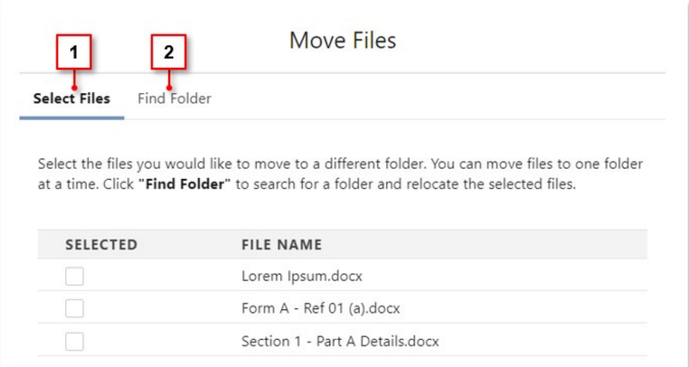


Number	Description
1	To open the internal document folder, check the Visible to Awarded Suppliers? Box Click Save
2	The Portal Account field should display the Portal Account of the awarded supplier. All portal contacts belonging to this Portal Account will be able to access documents in this folder, provided that the Internal Document Folders related list has been configured on the page layout for portal users.

Note: Supplier record entered on the Details tab, must have a Portal Account. If you manually select a Portal Account and it doesn't match the Supplier entered in the Details tab, you will be prompted with an error screen advising you of the issue.

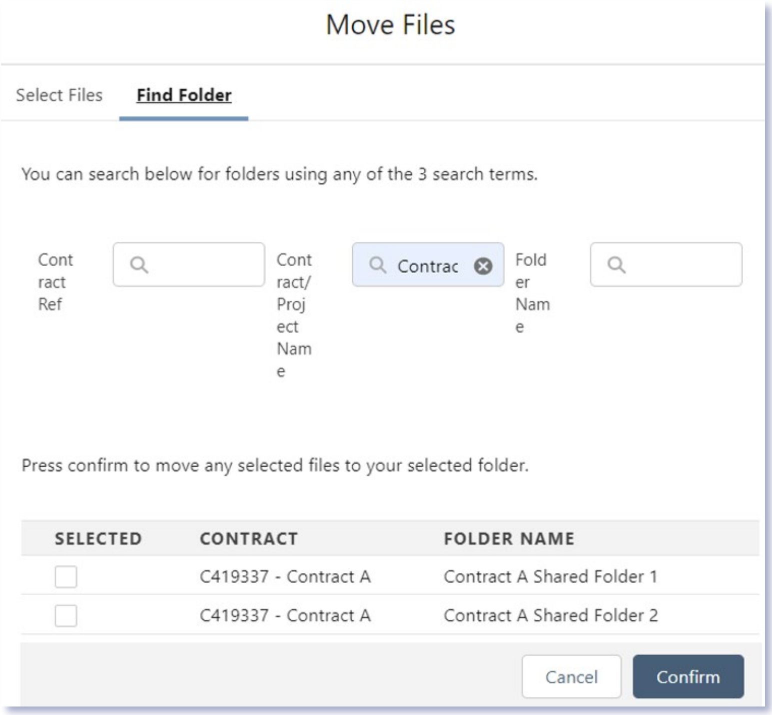
Move Files Between Folders

Move Files allows the user to move files between Internal Document Folders and Supplier Document Folders. These two sections may be under a different name in some client systems, but the function works the same. Click on the Move Files button located on the respective folder to get started.



Number	Description
1	Select the files you want to move
2	Find Folder: allow you to search for the folder you would like to move the files to. You can search by: • Contract Ref • Contract/Project Name • Folder Name

The search results are displayed dynamically on the page as you type in the search criteria. Select the desired folder and click on Confirm button located at the bottom of the page.



Processing DocuSign Envelopes

To make use of this feature you will need a DocuSign account with Envelopes in credit. These can be obtained from Atamis as a registered DocuSign reseller at the recommended retail price (RRP).

Atamis has an integration with DocuSign which allows users to send their *Contract Documents* for signature. The relevant parties can sign the documents using the DocuSign functionality. When the process is complete, the system saves a copy of the signed document on the relevant *Contract Document* record. A DocuSign Envelope is a bundle of documents sent together for eSignature.

Below is a summary of the features available:

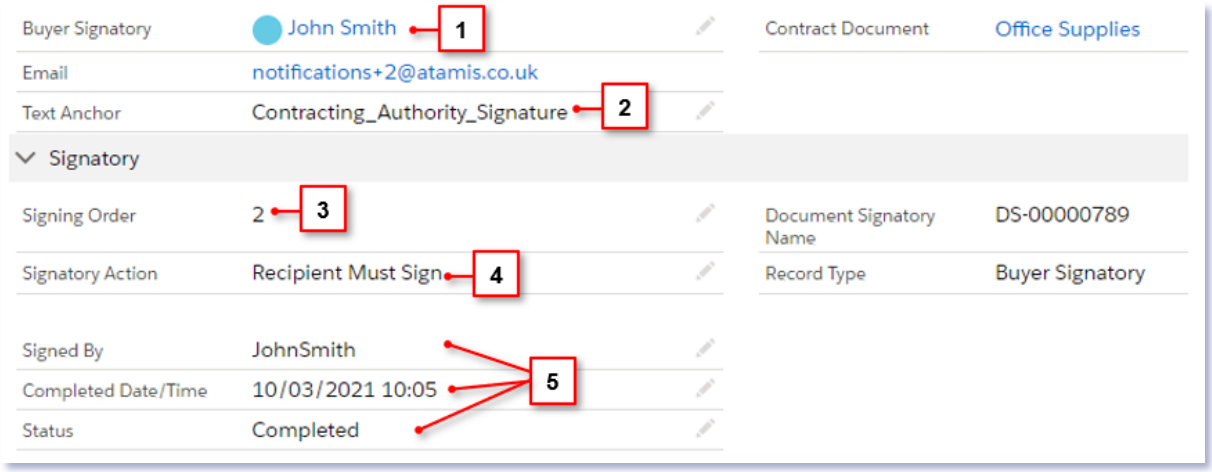
- Specify more than one *Signatory* and the order in which the document must be signed
- Record if recipients are part of signature process or if they should receive copies
- Track the *Status* of the document per signatory
- Customize reminders if document is pending completion
- Record the Date/Time of completion per signatory

Setting up a DocuSign Envelope

Navigate to the desired record and create a *Contract Document*. Once the *Contract Document* has been created, you will be presented with the screen below.

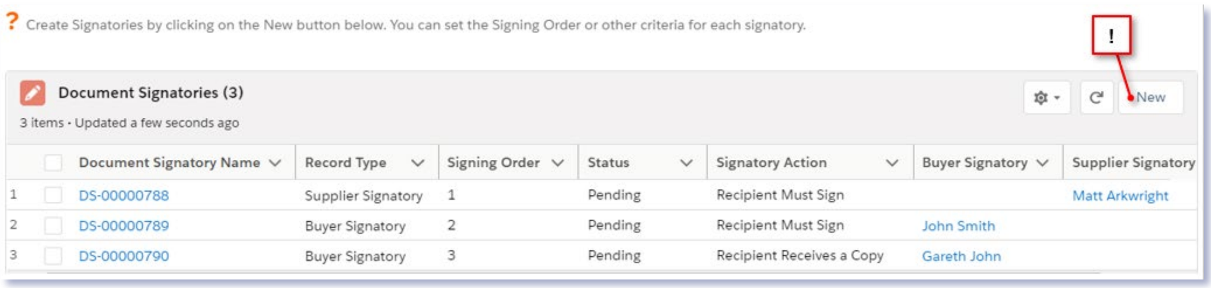
When a Contract Document is created, a Buyer Signatory and a Supplier Signatory are automatically created. You must enter a user for Buyer Signatory and one for Supplier Signatory. You can do this by clicking on the relevant record.

Click on the pencil icon to edit the field.

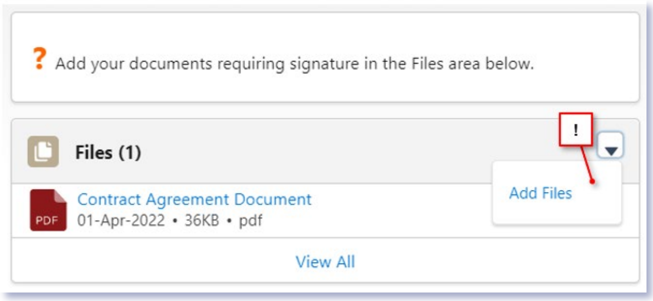


Number	Description
1	Search for the name of the user that will be signing the document from the buyer side and select it from the list.
2	Enter the text on which the buyer needs to sign. Ensure the text entered in this field is on the pdf file that will be sent across and that there is enough space around it on the page. This is to ensure the signature is visible within the boundaries of the page.
3	The `Signing Order` is set at the point of creation, but you can change this as you see fit per signatory.
4	`Signatory Action` is set at the point of creation, but you can change this as you see fit per signatory. This field also allows you to include parties that are not required to sign the document, but they can receive copies of it at the end of the process.
5	No action is required in these fields as these will be populated automatically by the system.

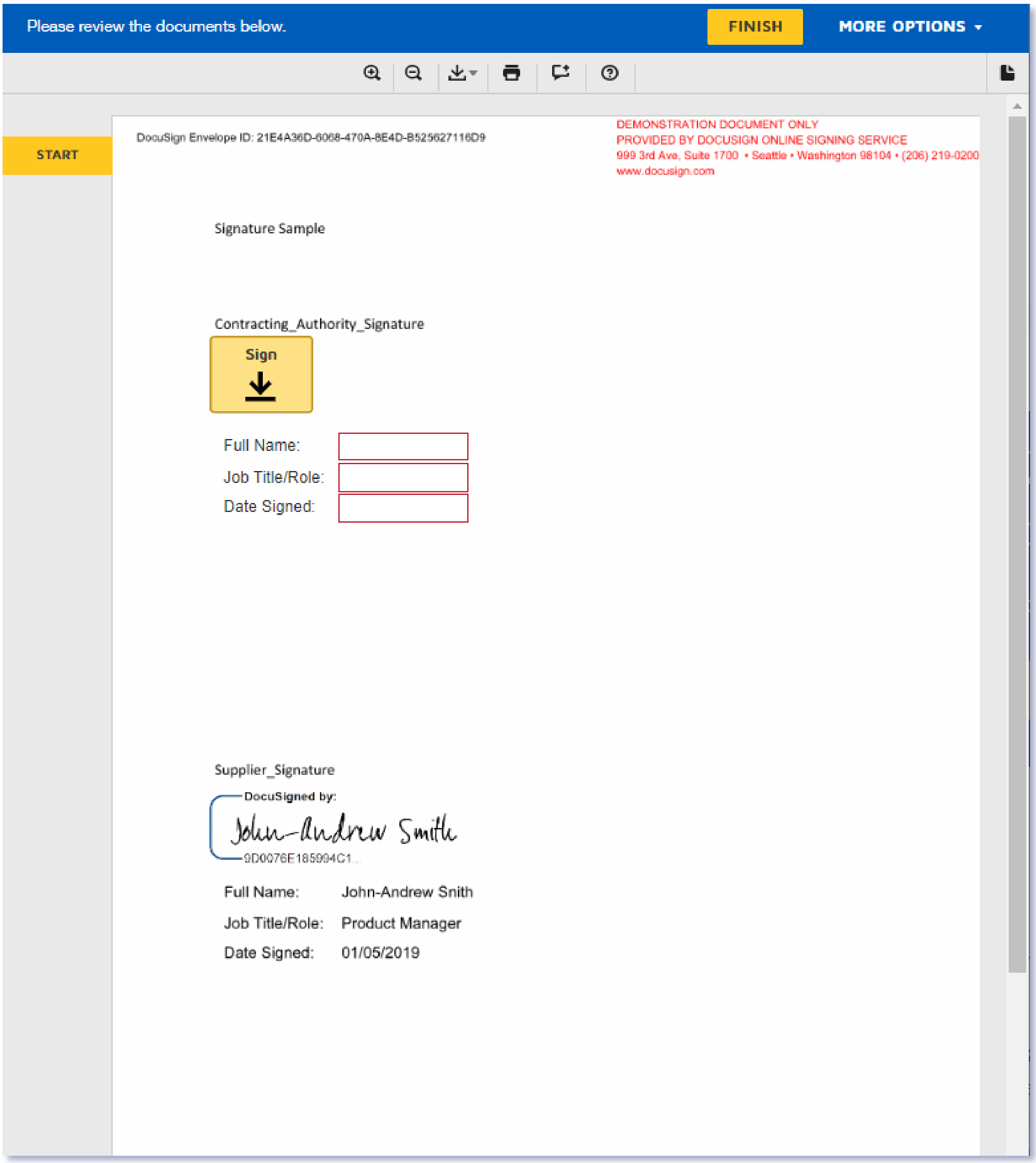
If you wish to add additional signatories, click on **New** and select `Buyer` or `Supplier Signatory`. Complete the required fields and click **Save**.



To add the document that will require signature, click on **Add Files** button in the `Files` area and add the document.

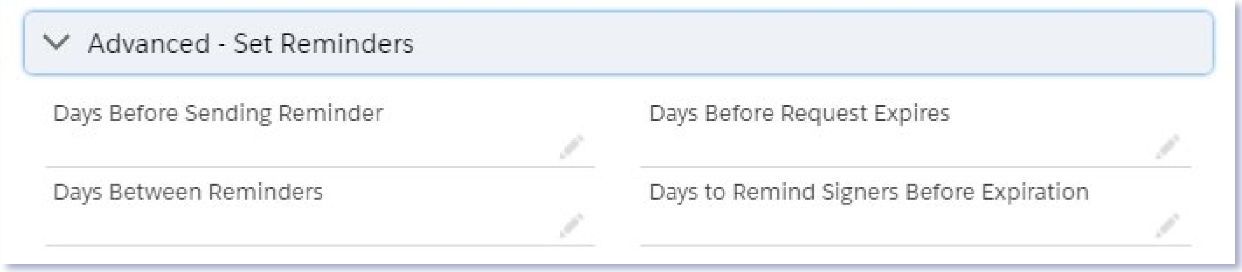


Note: Ensure the `Text Anchor` specified per signatory is on the file and there is sufficient space around it to ensure the signature is visible within the boundaries of the page. We recommend allocating half a page for the signature area. Below is an example of how the signature will be presented on the page based on the anchor provided.



Section name `Advanced - Set Reminders` allows you to set custom reminders. Email notifications will be sent based on the number of days you set for every field. Once a document is sent for signature, the recipient has a certain number of days to sign it. Please contact your Lead Consultant at Atamis to find out the set number of days for your account. Email notifications will be sent based on this.

It is not compulsory to set reminders, but if you require custom reminders, you must set the number of days before you send the document for signature by completing the fields below.

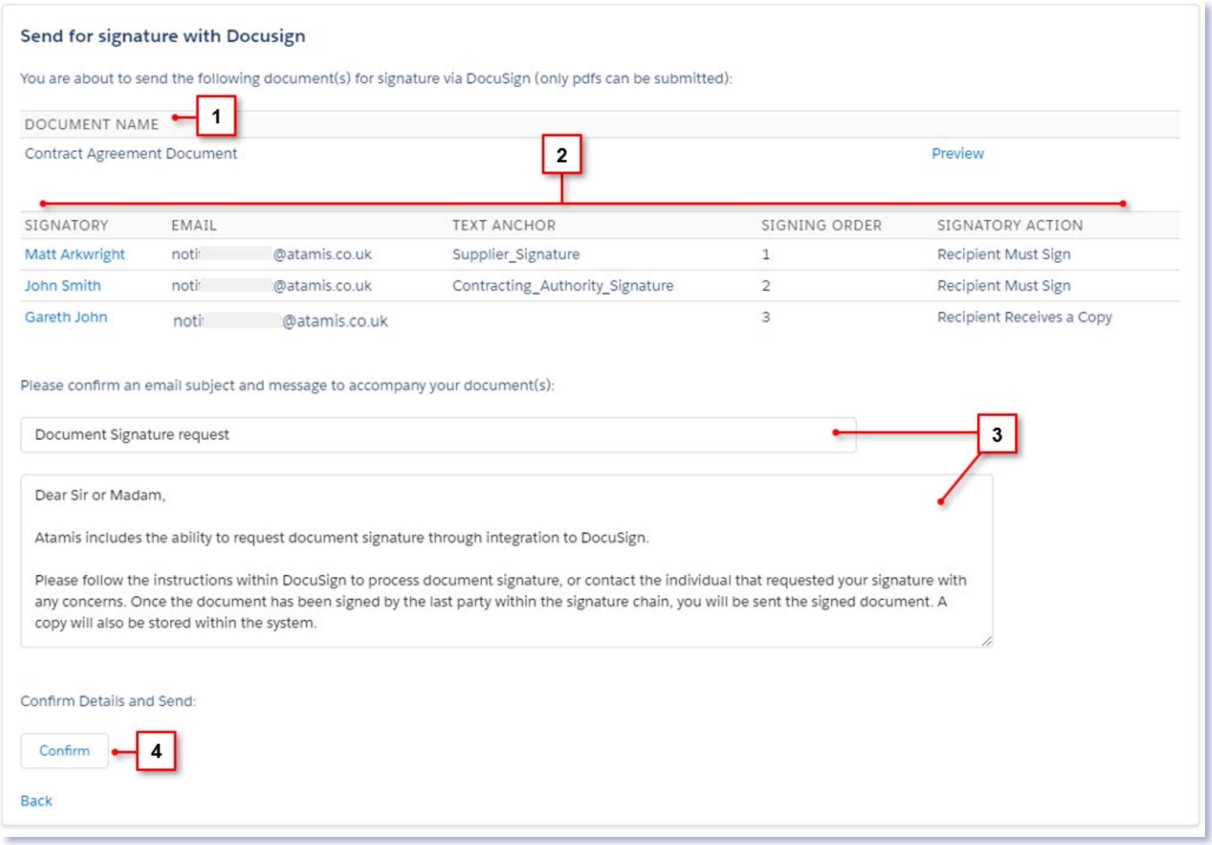


Sending a DocuSign Envelope for eSignature

The Contract Document record needs to have a `Status` of `Approved` and have the buyer and supplier signatories setup.

Set the Contract Document `Status` field to `Approved` and click **Send for Signature – DocuSign**.

You will be presented with a confirmation page which contains the following components:



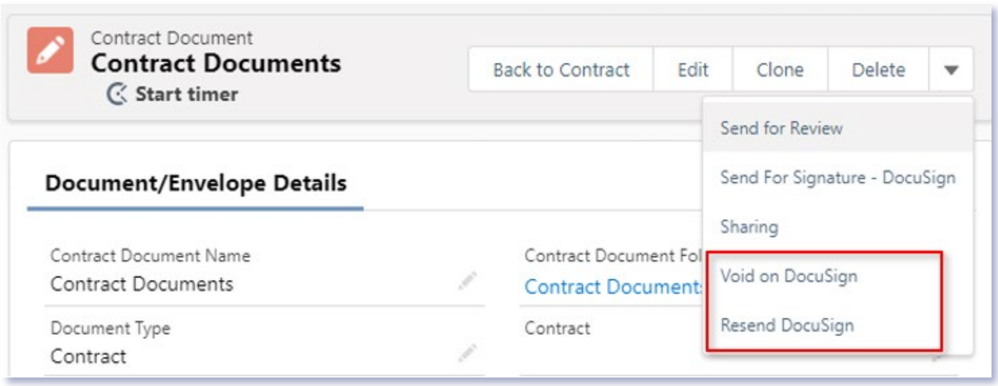
Number	Description
1	The name of the document you have uploaded. You can preview the document from this page prior to sending it for signature.
2	A list of the parties which will need to either sign the document or if they need to receive a copy.
3	If configured, the system will prepopulate the Subject and Message of the email that will be sent to the assigned parties. You can edit this text as you see fit.
4	Once you click on Confirm, you will receive a confirmation message and the document has now been sent.

All Atamis DocuSign Envelopes have at least one buyer signatory and one supplier signatory and are routed by DocuSign email for signing. Once they have signed, the Envelope is automatically routed by DocuSign email to the next signatory based on the defined Signing Order. Once signed by all parties, the signed PDF is automatically attached to the Contract Document record.

You can track the signature status for every signatory on the page of the Contract Document. The Status on the Document Signatories will update automatically as the specified parties complete their signatories.

Once the document has been fully signed, the signed version will be saved in the Files area and the Status will be updated to Completed.

Resending and Voiding DocuSign Envelopes



If you need to resend an Envelope for signature, from the Contract Document page click **Resend DocuSign.** If signatories had previously signed, they will be prompted to sign again and the new date/time will be saved on the document. However, it is not possible to resend an envelope for signature after it has been signed by all parties.

To cancel or void a DocuSign Envelope, click **Void on DocuSign**. Signatories will receive an email from DocuSign stating that the signing has been cancelled and DocuSign will prevent users from updating or signing documents in the Envelope. The Envelope and its Documents are retained in Atamis. Note that it is not possible to void an Envelope after it has been signed by all parties.

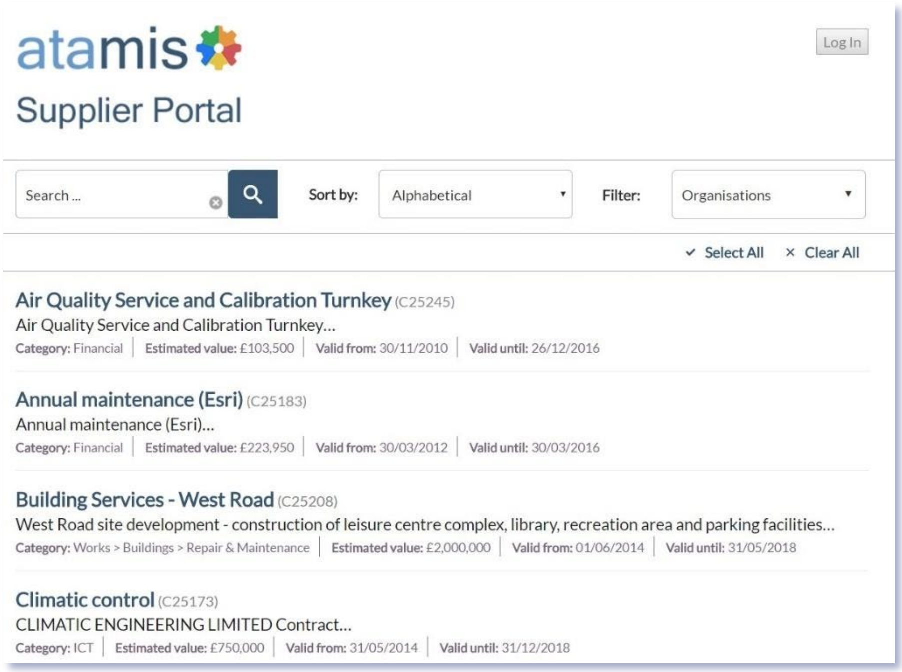
Publishing or Advertising Opportunities (Publishing Tab)

Atamis TM support three options for publicising tender opportunities:

- Atamis Tender Opportunities Site
- Contracts Finder (CCS)
- OJEU (or FTS when activated)

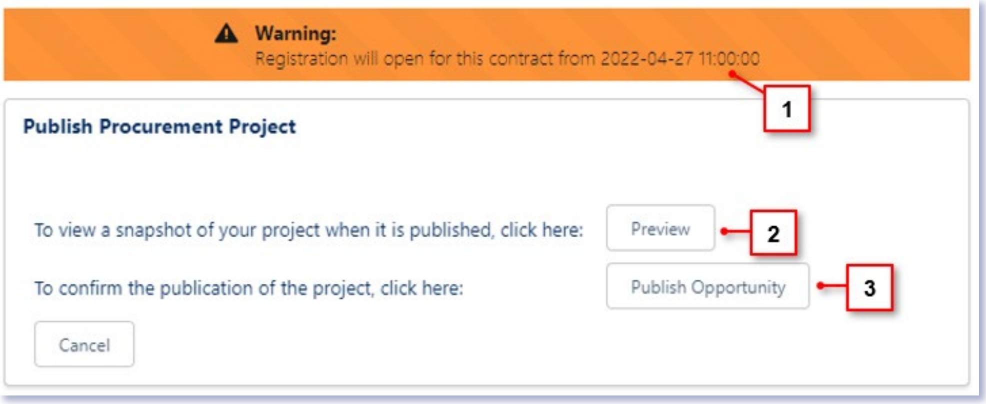
Atamis Tender Opportunities Site

An example of a public-facing Tender Opportunities Site is shown below. All pages visible to suppliers meet accessibility criteria and are responsive to mobile and tablet devices.



Each Atamis client has its own Site. To request a branded Tender Opportunities Site please contact Atamis Support.

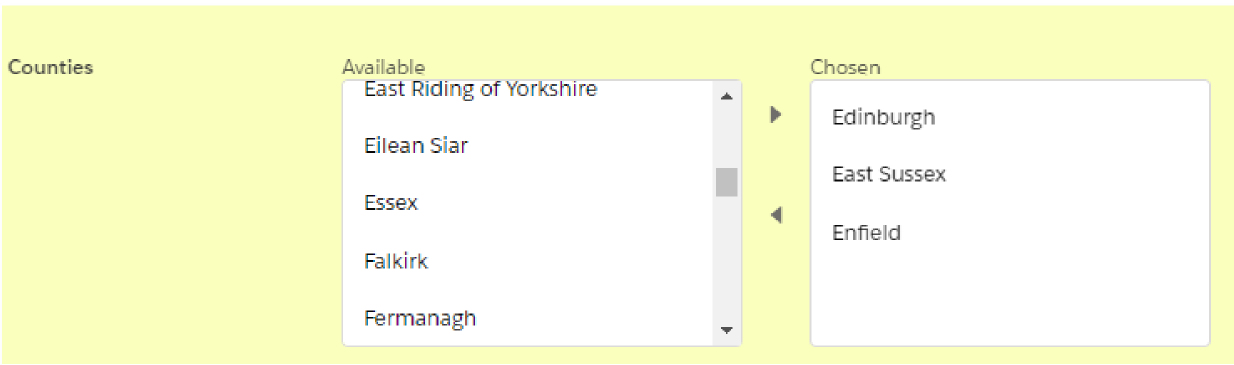
To publish a Project to your Tender Opportunities Site, locate (or create) a Task with Action Type Publish Opportunity and click Do Now.



Number	Description
1	If any Warning conditions apply these will be displayed. Projects must have at least a `Contract Name` and a `Description` to be published.
2	Click Preview to preview the Notice on the Tender Opportunities Site
3	Click Publish Opportunity to make the opportunity publicly visible. The opportunity will be displayed for easy access on the Atamis Supplier Portal Opportunities page.

You can also associate the opportunities with Counties in the UK and display these on an Interactive Map.

Navigate to field Counties and select the applicable counties from the list provided.



These opportunities will be displayed on a Map from which the suppliers can click on and select opportunities they want to participate to. Below is a screenshot of what that may look like.

Tip: In order for Suppliers to be able to register interest in an opportunity, your Project will need to have a Task with an eSourcing Milestone of `Registration Starts`. Suppliers won't be able to register interest until after this date.

Contracts Finder Notices

Contracts Finder Notices are not included in Templates, but when you create a Contracts Finder Notice record, the details are automatically copied from the Project.

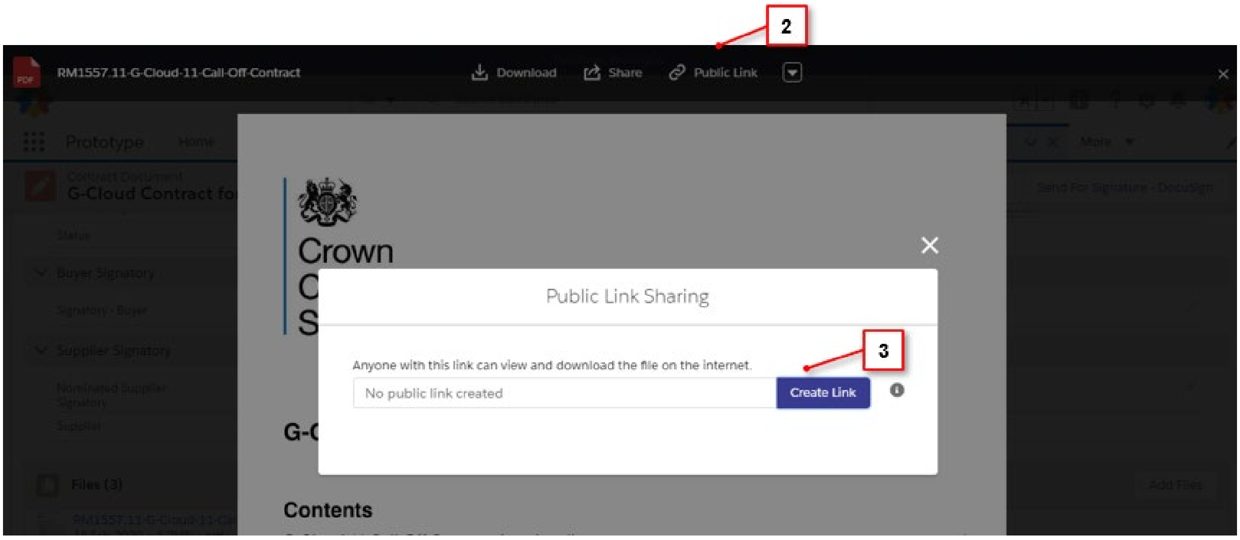
Setting up a Contracts Finder Notice

To create a Contracts Finder Notice, either:

- Locate (or create) a Task of type Contracts Finder and click **Do Now**, or
- From the Publishing tab of the Project, locate the Contracts Finder related list and click **New**
- Select the type of Notice you wish to publish and click **Continue**. The system populates the Notice for you by copying data from fields on the Project page.

Complete the remaining relevant fields in the Contracts Finder Details including the *Contact*, *Key Dates* and *Procedure* sections.

Upload files that are to be accessible via links from the Contracts Finder site from the *Files* or *Notes and Attachments* related list. You will need to follow these steps to make your file available via a Public Link:



Number	Description
1	Click on your file to show the preview

2	Click Public Link
3	Click Creqte Linkm then click Creqte to confir;< You do not need to copy the linkm just close the previez pqne<

To add a CPV code, from the *CPV Code* related list, click **New** from the drop-down menu. Start typing into the CPV description to reveal matching CPV codes, select one and click **Save**, or **Save & New** to add more.

If your notice is an Award Notice, click **Select Awarded Suppliers** to select one or more Suppliers Bidding, then click **Next** and **Confirm**.

Contracts Finder Notices of type Contract Award can be created directly on the Awarded Contract Record.

- If awarding from a Procurement Project, you must have a Supplier Bidding record with the relevant fields populated.
- If awarding from a Contract Record, you must have a linked Supplier record with the relevant fields populated.

Validating and Submitting a Contracts Finder Notice

Click **Submit CF Notice** to validate the Contracts Finder Notice has been completed fully and conduct a final review before confirming.

To withdraw a Notice, click **Withdraw CF Notice**, enter a justification and click **Withdraw**.

Tip: to create a second Contracts Finder Notice of a different type, select the first Contracts Finder Notice and click **Clone**, then select the Record Type for the new Contracts Finder Notice. All the common fields will be replicated to save you re-typing them.

OJEU/FTS Notices

Atamis is approved to use the UK's Find a Tender service and has transitioned to this service as of 1st of January 2021.

The interface on Atamis has not changed and the users of Atamis TM can publish notices as they are currently doing. However, additional fields have been added to the page layouts referring to the FTS publishing as highlighted in the image below.

Contract	London
OJEU Unique Ref	2020-999596
Status	Submitted
FTS Status	Submitted
Submission ID	20201214-005982
Published Identifier	
OJEU Notice Link	Not yet published
FTS Submission ID	20201214-000002
FTS Published Identifier	2020/S 000-012634
FTS Notice Link	Published - click to view
FTS Notice Link (Test)	Published - click to view

There is a requirement that procurements commenced on OJEU prior to the end of the transition period must be concluded on OJEU. To accommodate a dual publishing service, Atamis renamed some fields or amended confirmation messages to not cause any confusion for the users.

We made a checkbox field on the contract object called *Pre Brexit Procurement*. Any procurements that have begun before 1st January can be flagged so that they will be dual published after the transition period ends.

Once the 1st January passes, notices will still be sent to OJEU for notices marked as "Pre Brexit Procurement".

Publishing to both endpoints simultaneously would appear like this to a user:

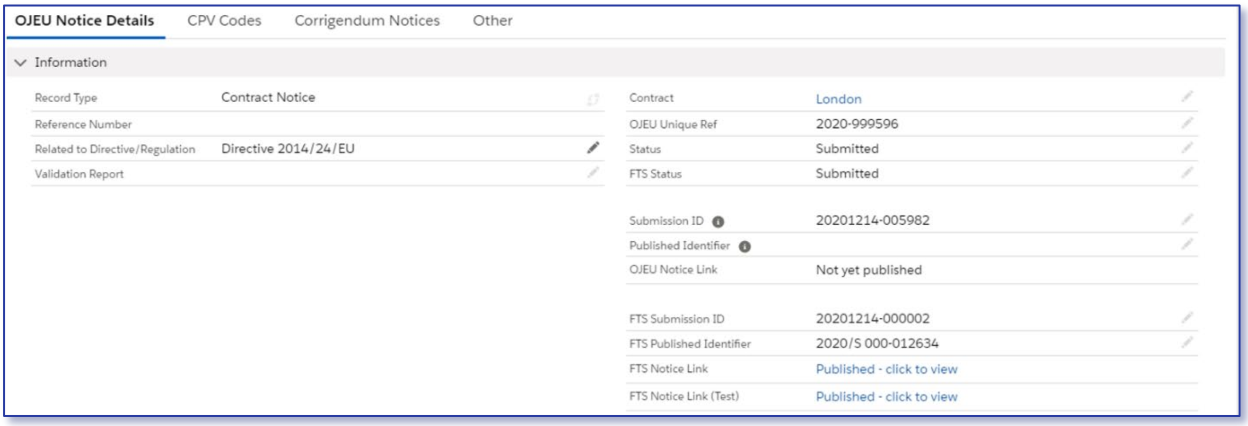
Confirm OJEU form submission

Use "Validate" to check the notice for errors before submitting. If the notice complies with the validation it can then be submitted. Note that the validation will only check the forms for compliance with the basic form requirements. After a successful submission OJEU can still reject a notice if it does not meet certain data quality standards.

Validate | Submit Notice | Back

Success
- Your FTS Notice has been successfully submitted. You will receive an email notification when your Notice passes quality control. Thank you.
- Your OJEU Notice has been successfully submitted. You will receive an email notification when your Notice passes quality control. Thank you.

Once notices are published and accepted the image below is the basic view that we would have after a user submitted a notice that was subject to dual publishing.



FTS will use the same process as described below for OJEU.

Atamis currently supports all variants of the following types of Notice: PINs, Contract Notices, Contract Award Notices, VEATs and Corrigendum Notices.

Atamis will auto-populate Notices from three sources:

- Fields entered on the OJEU Notice of the Template that the Project was created from
- The Project details, including Suppliers Bidding and Requirement Sections
- The buying organisation of the user creating the Notice – for OJEU Address fields

Setting up an OJEU/FTS Notice

To create an OJEU/FTS Notice, locate (or create) a task of type OJEU/FTS Notice and click **Do Now**. The OJEU/FTS Notice should contain pre-populated fields that were copied from the Template when the Project was initially created.

Alternatively, from the Publishing tab, click **New** from the OJEU/FTS Notices related list, select the appropriate record type and click **Save**.

Click on the **OJEU/FTS Notice Ref** to open the draft Notice and click **Auto-fill Contract Details**. This pulls in data held on the Project including descriptions and key dates. If the system is used by multiple authorities/locations it will also populate the OJEU/FTS Address fields based on the *Buying Organisation* selected on the current user's User record.

Where available, click **Auto-fill Awarded Suppliers** and **Auto-fill Lots** to copy awarded Suppliers Bidding and Requirement Section details from the Project respectively.

Depending on the type of Notice, use the other tabs available to review and modify *CPV Codes*, *Lots*, *Award Criteria* and *Awarded Suppliers*.

Tip: to create a second OJEU/FTS Notice of a different type, select the first OJEU/FTS Notice and click **Clone**, then select the Record Type for the new OJEU/FTS Notice. All the common fields will be replicated to save you re-typing them.

Validating and Submitting an OJEU Notice

To check you Notice click **Validate and Submit…** then click **Validate**. Incomplete or invalid fields will be listed along with Warning message. Correct the warnings and re-validate.

Tip: If you have several invalid fields to correct, right-click on your browser tab and select Duplicate. Keep the validation errors on one tab and navigate back to the Notice in the other. Copy the first error field and use Ctrl+F on the other tab to locate it quickly. Repeat for the other fields.

When you have resolved the Warnings, click **Submit** to submit your notice. OJEU/FTS Notices require 2-3 days to be approved. FTS Notices will be validated and approved in real-time.

Once approved, the link to the Published Notices will be displayed in the field *OJEU/FTS Notice Link*.

Managing Suppliers Bidding (Suppliers Tab)

Where Projects are published and suppliers register interest, the Supplier Bidding records will be added automatically. This section is primarily concerned with adding and inviting suppliers in non-advertised procedures.

Setting up suppliers to bid on an opportunity involves a two-step process:

1. Add the Supplier to Suppliers Bidding (using *Suggest Suppliers* and/or *Add Suppliers*)
2. Invite the Supplier to give them access to selected approved Requirement Sections

Suggest Suppliers

To get the system to suggest suitable suppliers to add, first ensure that the *Category* field on the Project page is populated. The system will search for supplier records in your system with this as their *Default Category*. Then locate (or create) a Task of type *Suggest Suppliers* and click **Do Now**.


Suggested suppliers to bid on this project

The following suppliers match the category for this project. Please select suppliers to include on the project. (Suppliers will not be invited or emailed at this stage.)

If you'd like the system to allocate random suppliers for you, please choose a number of suppliers to pick then click Select.

3 Select

Add Supplier to Bid?	Supplier Name	SME?	Local?	Total Spend	Number of Contracts	Dependency Risk (%)
☐	CRAWFORD, A J	No	Yes	0	5	
☑	Advanced Business Solutions	No	Yes	0	0	
☑	Logotech Systems	No	Yes	0	0	
☐	A J Systems	No	Yes	0	0	
☑	Dart Systems Ltd	Yes	Yes	0	0	

Done Cancel

1 These columns display data retrieved from the Supplier page using the Atamis SA module.

2 Select one or more suppliers, or to let the system pick a number of suppliers at random for you, select the number and click **Select**.

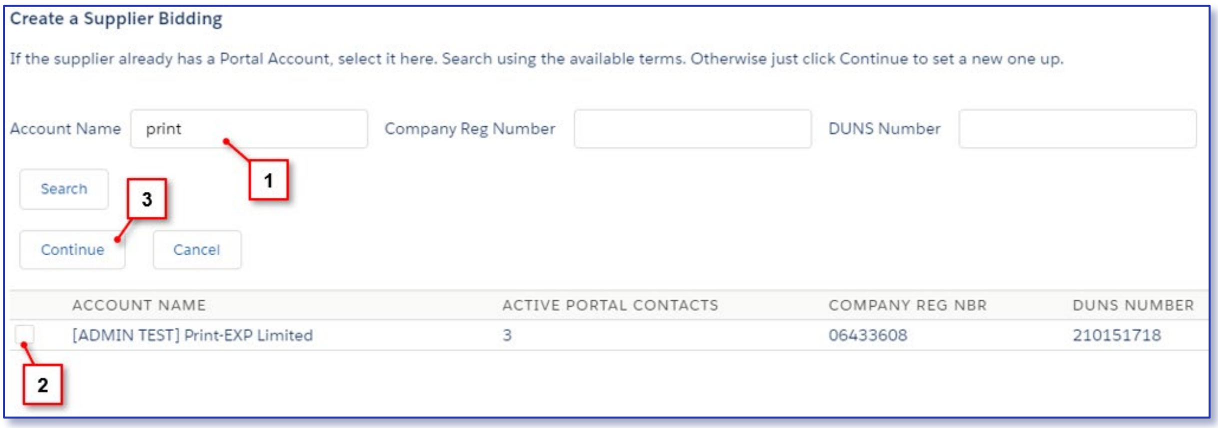
3 Click **Done** to add the suppliers to your Suppliers Bidding list (they will not be invited or notified at this stage).

4 The Portal Account details will be automatically set for those suppliers that have been linked to a Portal Account. For any that do not, you will need to link the Supplier Bidding Record to a Portal Account as described in the next section.

Add Suppliers Manually

If you know a supplier you would like to bid for your contract you can add them manually. If you want the supplier to respond through the Supplier Portal, you will need to link their Supplier Bidding record to their Portal Account. If they don't have a Portal Account, either ask them register or you can set them set up as shown below.

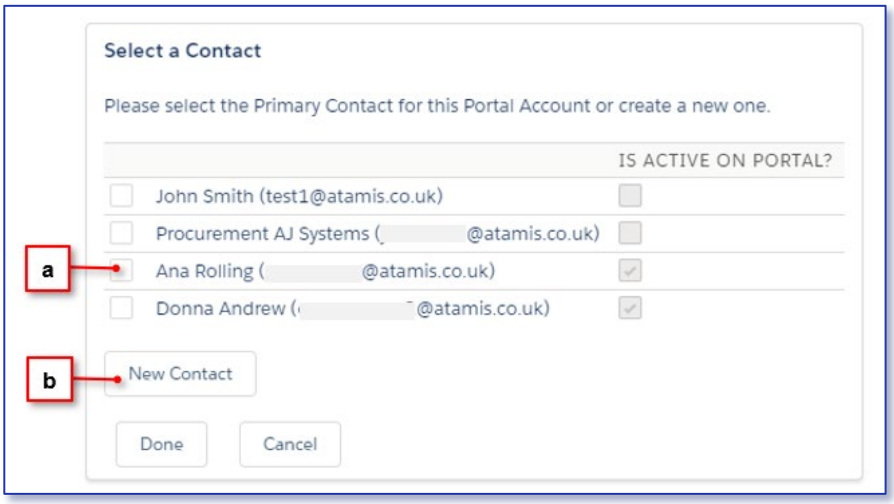
To add a supplier manually, from the Suppliers tab, click **Add Suppliers**. You can search for suppliers using their Portal Account Name, Company Reg Number or DUNS Number.



Number	Description
1	If the supplier has a Portal Account, you can search for the account using the fields available and link it to the record at this stage. Enter your search text and click **Search**.

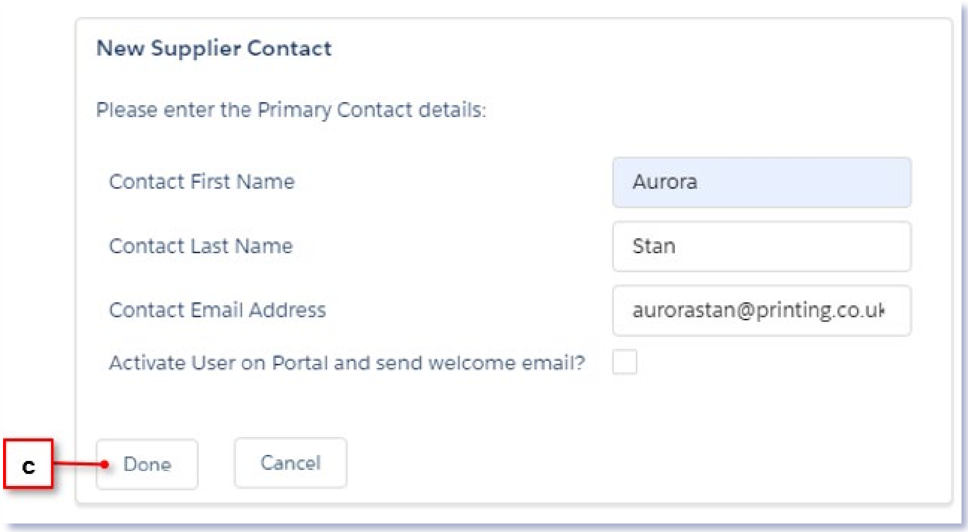
2	Select the Supplier from the list by clicking the **checkbox**. The list will also give you the number of `Active Contacts` with this Supplier on the Atamis Supplier Portal. Click **Continue** to proceed.
3	If you cannot find the supplier you are looking for, you can create one by clicking Continue. The next page will request the supplier's name and their contact details.

On the next page, you can select the Primary Contact for this Procurement Project. The rest of the contacts associated with the Account will still have access to the Procurement Project, but dialogues will be addressed to the Primary Contact.

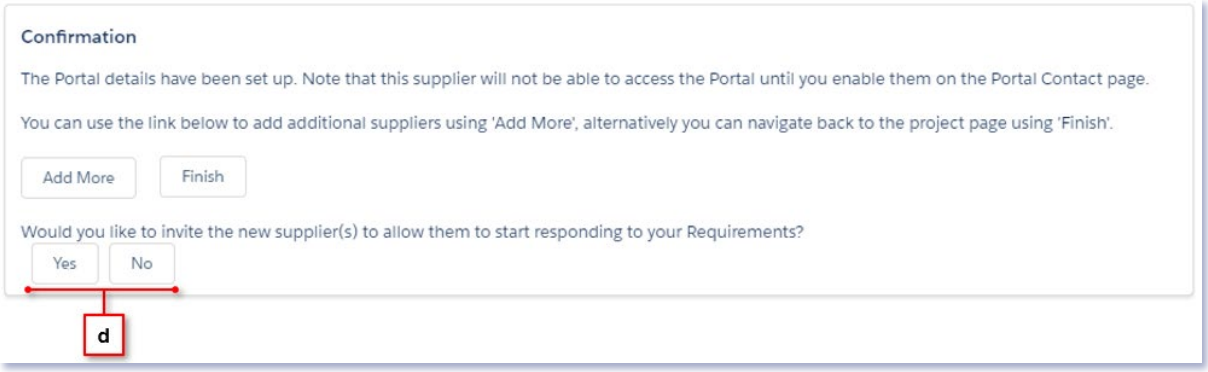


a) Portal Accounts require *Primary Supplier Contacts*. These are the contacts that will be able to log in on to the Supplier Portal. After you have chosen the Portal Account you will be requested to select which one of the contacts associated with the account should be the Primary Supplier Contact. Click **Done** after you have selected the contact, followed by **Finish** on the next page.

b) If the Portal Account has no contacts associated, you can create one by clicking **New Contact**



c) Complete the requested fields and click on Done, followed by Finish on the next page. If you wish to activate the user at this stage, check the box for Activate User on Portal and send welcome email?; if not, the user will be activated when you invite all suppliers to bid.



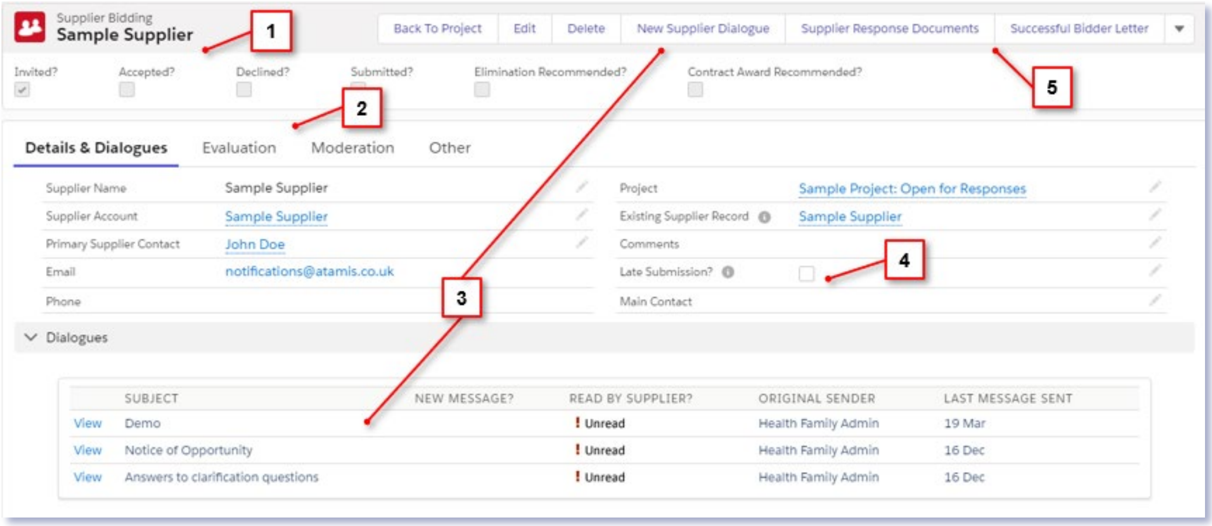
d) In a scenario where the user has already invited suppliers to the project, but requires another supplier to be added, then system will provide the user with the option to invite it at this stage, rather than running the project Invitation task again. Clicking Yes, will take the user to the invitation page, where they will have to complete the steps (see Invite Suppliers for details). Clicking No, will take the user back to the project.

The supplier you have added will not be able to view any details or respond until you Invite them to participate to the Project.

Tip: If Supplier has already an account set up, their information will automatically populate the supplier's contact details so you do not have to re-enter their information.

Supplier Bidding Page

Each Supplier Bidding on the project will have a Supplier Bidding page which will contain information such as, contact details, submission details and dialogues.



Number	Description
1	The banner provides a quick-reference status of the Supplier Bidding on the Project
2	The Evaluation and Moderation tabs provide access to evaluation and moderation scoring
3	Dialogues (messages) with the Supplier Bidding can be viewed here. To send a message, click New Supplier Dialogue. See Message Centre for more details.
4	The Late Submission box can be used to permit a Supplier Bidding to submit their tender after the deadline provided that evaluation has not started
5	Buttons for downloading a supplier's submitted documents and for generating success/reject letters can be accessed here

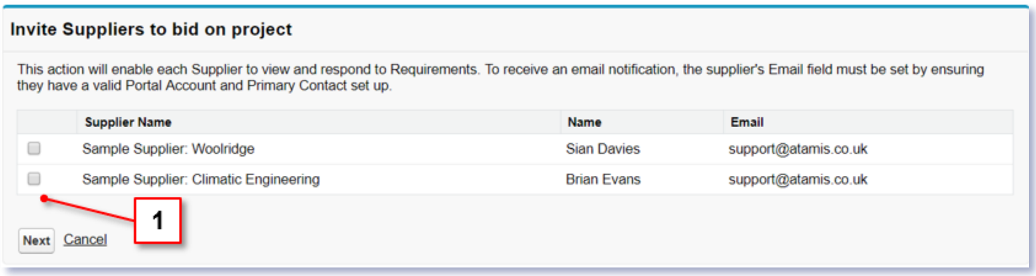
Invite Suppliers

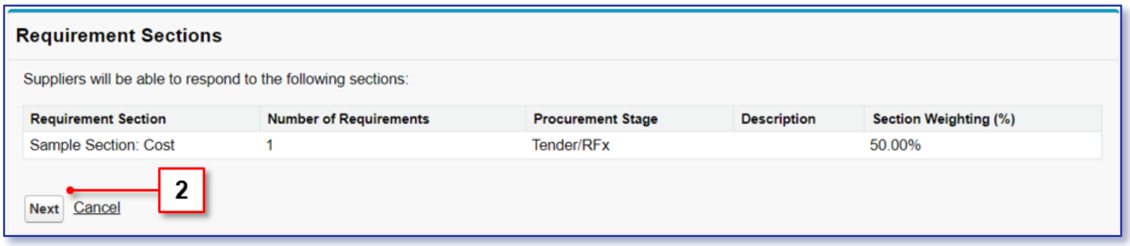
Before you invite suppliers:

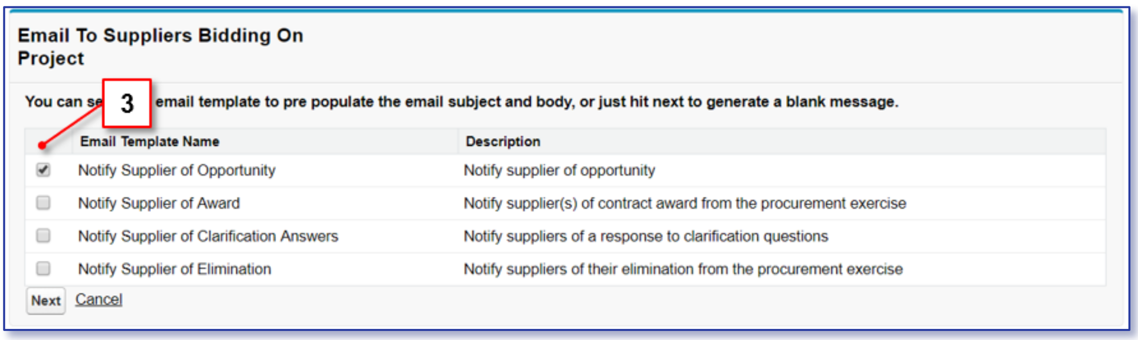
a) One or more suppliers must have been added to the Suppliers Bidding list as described above
b) One or more Requirement Sections must have been Approved
c) If you're using a Procedure with a Secure Tender Box, the required number of Lock Keys must have been entered

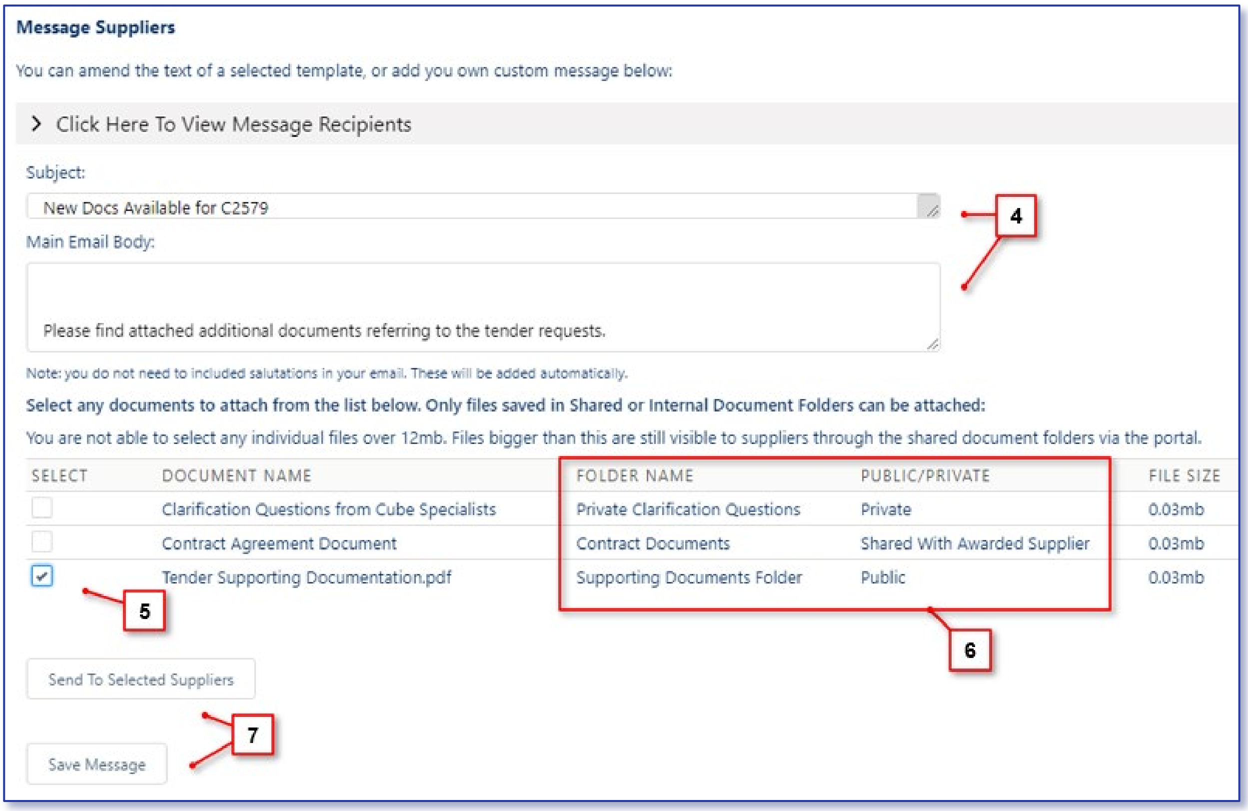
Tip: Only authorised users can enter Lock Keys: to grant access your System Administrator will need to assign a Permission Set called *Atamis eSourcing Fields - Lock Keys* to the relevant users.

To invite selected suppliers to tender and notify them by email, from the eSourcing Console or the Tasks tab, locate (or create) a Task of type *Invitation* and click **Do Now**.









Number	Description
1	Select the suppliers you would like to invite and click Next. Note that it is only possible to invite Suppliers Bidding that have a Primary Contact with an email address.
2	Confirm the Requirement Sections that will be visible to suppliers and click Next, and click Next again to confirm the suppliers.
3	Select an Email Template containing an appropriate message to use and click Next. Note email actions can be saved on Templates in which case you will not be prompted to complete this step.
4	Make changes as required to the Subject and Main Email Body. Note that salutations are automatically added to the body of the email generated by the system.
5	Optionally, select one or more files to attach to your message.

6	Note that the system indicates the folder that each available document is currently located in and also whether it is Private (Internal Document Folder), Public (Supplier Document Folders) or if the file has been Shared with Awarded Supplier. Only the files you select will be attached to the message. Files in Supplier Document Folders will remain accessible by suppliers from the portal even if you don't attach them.
7	Click Send to Selected Suppliers to send the message with any selected attachments or click Save to save a draft that you can return to later.

Depending on the configuration used in your system, the email received by suppliers will either contain the email body and attachments (default config for Private Sector clients) or will contain just a notification message with a link to the Portal Message Centre where supplier users can read the message and download attachments (default config for Public Sector clients).

Effect of Invitation Task

When the Invitation Task is completed, the invited Suppliers Bidding will be able to respond to the Approved Requirements once the Response Window has opened.

The system keeps a record of the Invitation Email Action, including who it was sent to. This can be accessed from the Dialogues on the Supplier Bidding Page. This section also advises if the supplier has read or not the email invitation.

Note: Any type of communication the user has with the bidder creates a dialogue which can be accessed via Dialogues located on the Supplier Biddings Page – this includes the Invitation to bid.

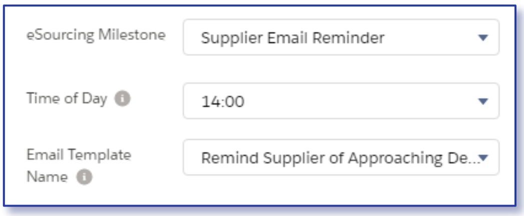
Withdrawing an Invitation

The system checks a box on the Supplier Bidding record to indicate that they have been invited. Unchecking it would instantly withdraw the supplier's access to the opportunity. However, this checkbox will be read-only for most users. If the field is read-only and you wanted to withdraw the supplier's access to the opportunity, delete the Portal Account field from the Supplier Bidding record. Neither of these methods of withdrawing access deletes any data, and the action can always be reversed.

Schedule Automatic Email Reminders to go to Suppliers

To notify suppliers by automated email of an approaching deadline (or to generate any other auto-email) you can use Tasks with an eSourcing Milestone of `Supplier Email Reminder`. Emails are sent automatically on the Due Date of the Task to all Suppliers Bidding on the Project that have not been Eliminated and have not Declined.

To set up an automated reminder, from the Task tab click **New** and set these fields:



Tip: the e-mail templates related to this task can be modified. Please contact Atamis Support to set this up.

Email Suppliers

To send an ad hoc or general email to Suppliers Bidding (for example to notify suppliers of a change to the deadline, or to email answers to multiple clarification Questions), use on of the following methods:

- From the eSourcing Console, click **Message Suppliers** from the Messages menu
- From the eSourcing Console, click **Message Centre** from the Messages menu and click **New**
- Locate (or create) a Task of type *Email* and click **Do Now**

Please refer to instructions 4 to 7 for Invite Suppliers.

Email Templates

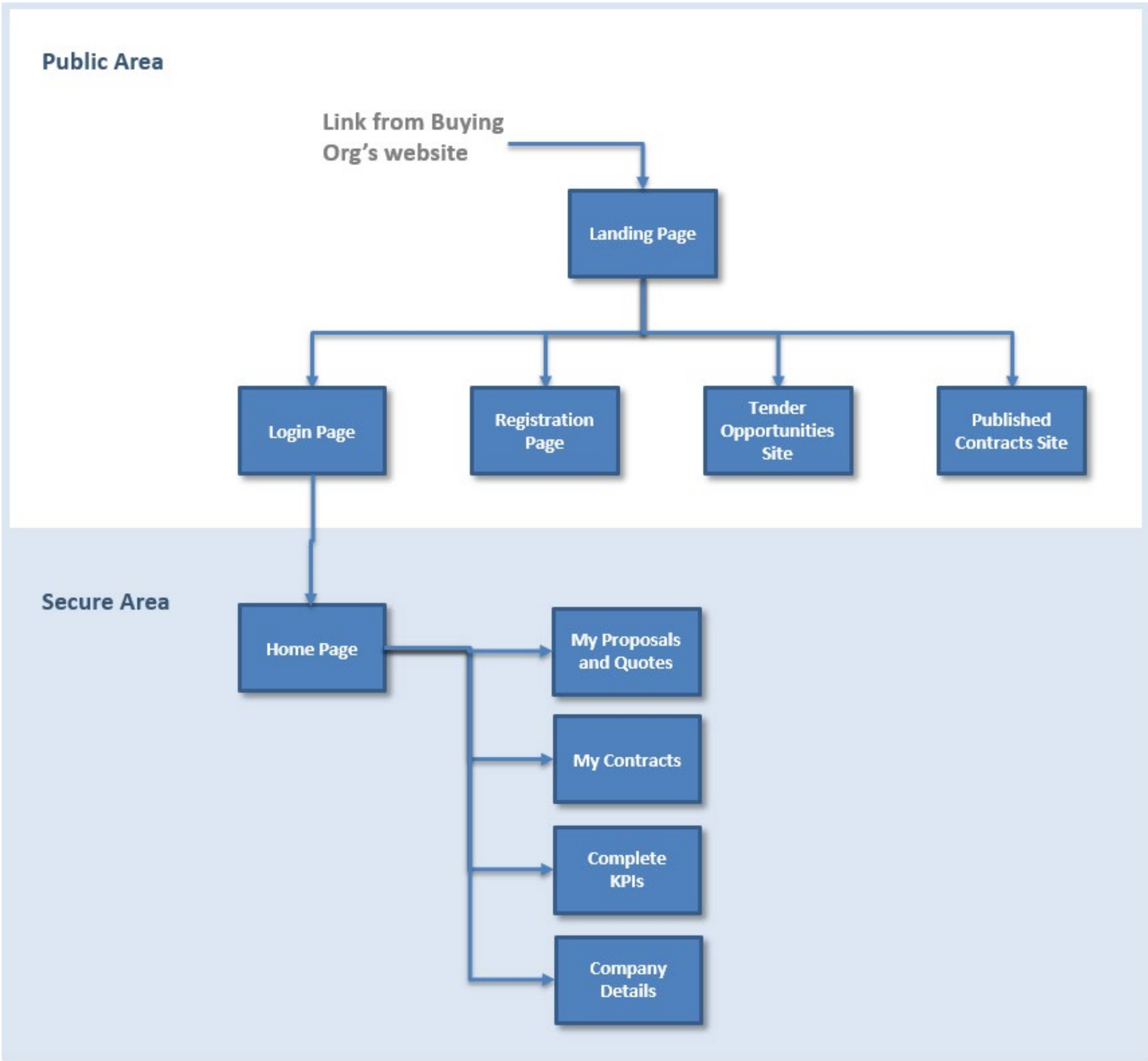
Email Templates can be maintained by trained System Admin users. From the Setup area search for Email Templates and refer to the standard Salesforce Help Pages.

Supplier Portal

This section gives an overview of how the Supplier Portal appears to suppliers. Each buying organisation's Supplier Portal can be branded and is not shared with any other buying organisation (unless by prior arrangement).

Portal Pages

A simplified schema of pages available within the Atamis Supplier Portal is shown below:



Hyperlinks from any of the pages in the Public Area can be inserted into pages of the buying organisation's website. Hyperlinks to pages in the Secure Area can also be used, but suppliers will be directed to the Login page first.

Not all pages need to be used, but for eSourcing, the following pages are required as a minimum:

- Login Page
- Home Page
- My Proposals and Quotes

The My Proposal and Quotes area comprises a number of pages from where suppliers respond to your requirements, view documentation, raise clarification questions and submit their response.

Home

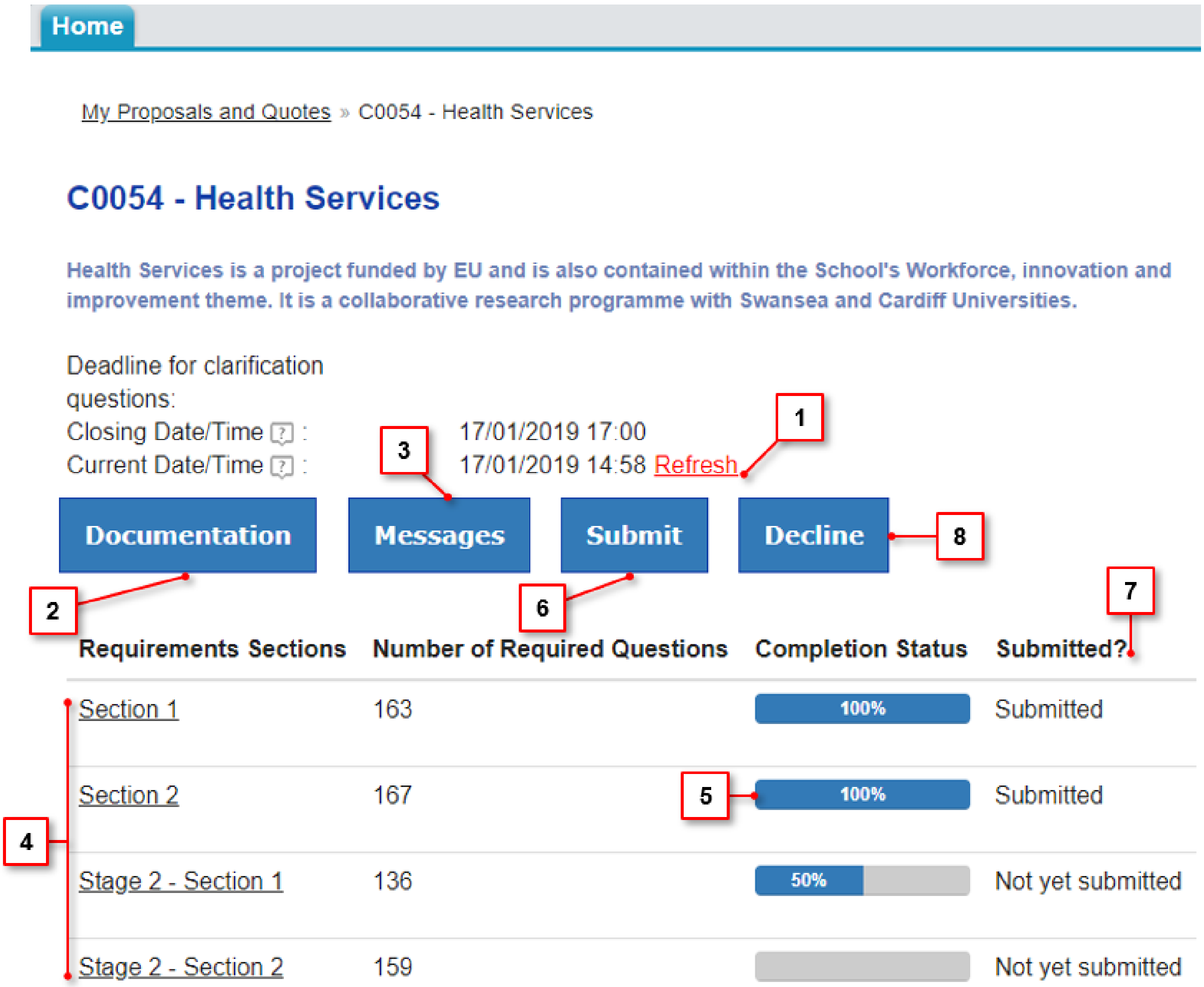
My Proposals and Quotes

Show:

All

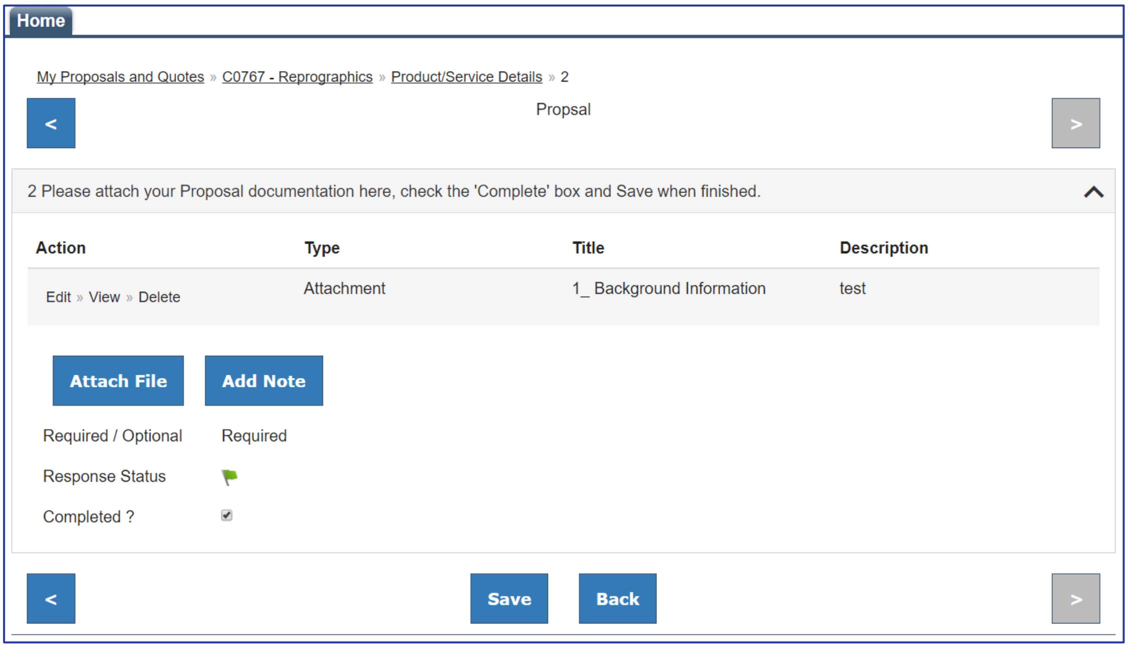
Ref/Title	Issued by	Status	Closing Date	Time Remaining
C0706 - Stockworth Site renovation	Facilities	Open	13/12/2017 12:00	> 1 month
C0709 - Scaffolding	Facilities	Response deadline not enforced	06/07/2017 12:00	Closed
C0736 - Abraaj Test Project		Closed	27/10/2017 12:00	Closed
C0740 - Exploratory Analysis 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

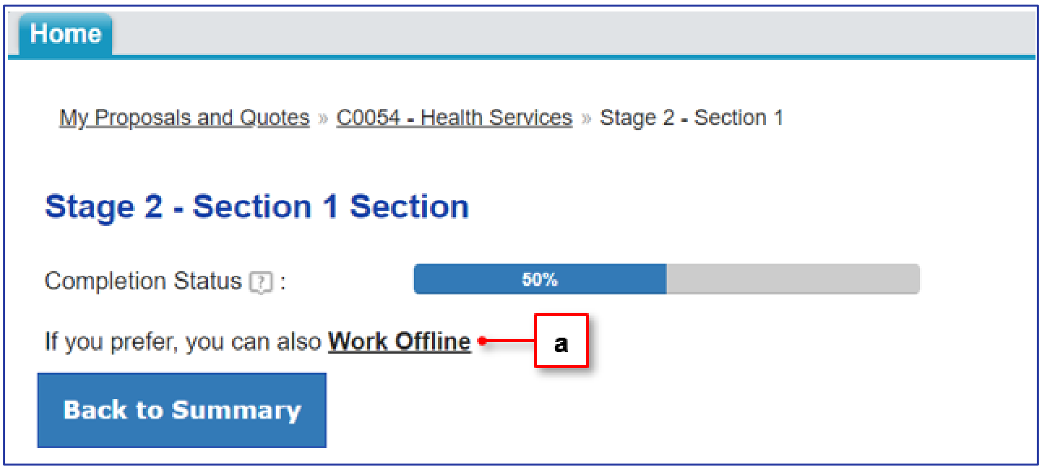
Suppliers click on an **Opportunity** to view Requirement Sections:



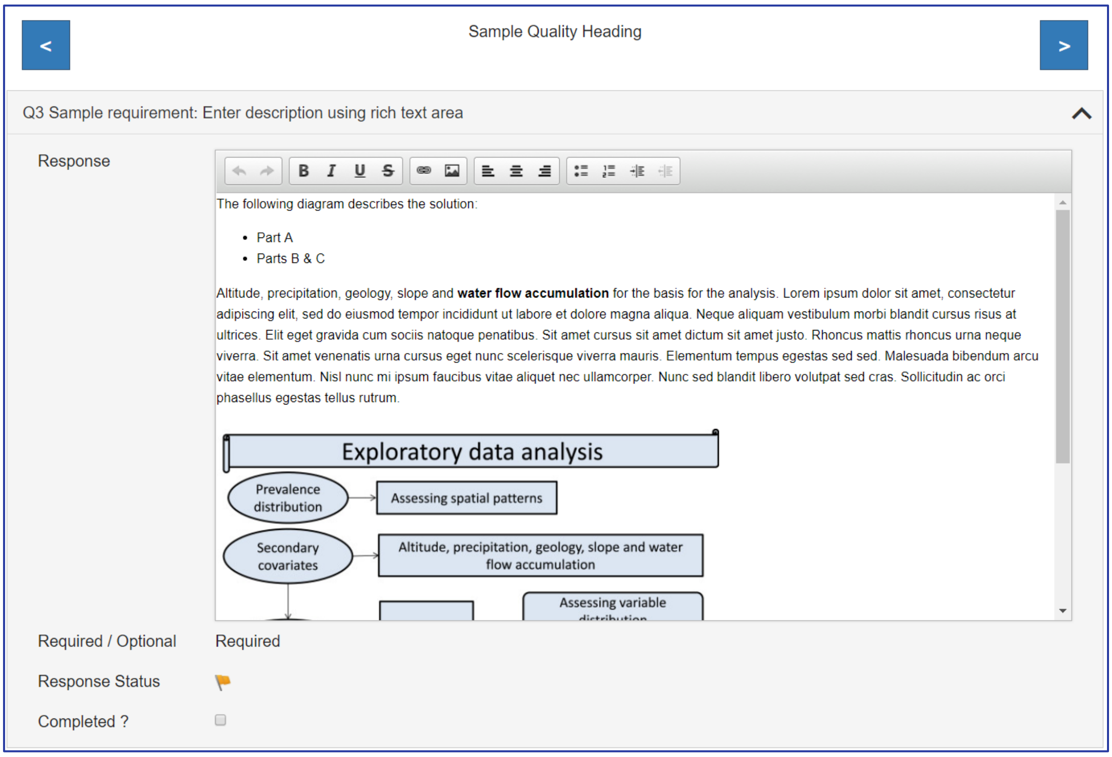
Number	Description
1	If the supplier stays on this page for more than 30 seconds, this red link appears on the page to alert them to recheck the current system date/time.
2	All files loaded in Supplier Document Folders are accessible from this link and appear as shown:
3	The communication between the organisation and supplier must take place via messenger function. Suppliers can access all communications on Messages page. Detailed guidance on how to use this feature is provided on the Supplier User Guide.
4	Each Requirement Section is associated with a project stage. As the project progresses the Requirement Sections will be visible here for suppliers that haven't been eliminated or declined. See Specialist Procurement Procedures for Multi-Stage Procurements.

	a) For each Requirement Section, the suppliers can use the Work Offline function. The system will provide a spreadsheet in which the suppliers will be able to input their response and upload them on to the portal.
5	The completion status for each Requirement Section is calculated by the system from all of the Required Responses in the Section. If a supplier has entered a Response but not marked it as Complete, the system treats that Response as 50% complete; if they checked the Complete box, it treats is as 100% complete. Each Response page will have a different appearance depending on the Response Field Type. Two examples are shown below for Attachment…
6	When a Supplier clicks Submit the system will check they have completed all the Required (including Pass/Fail) Requirements, then mark all Responses as Complete and display a submission confirmation message to the supplier. Upon confirmation of submission by supplier, a submission notification will be sent to the supplier and the Project Owner. Submission notifications are not being sent to the Project Owner if the Project is a closed tender, but they can be accessed when the evaluation starts.
7	When a Supplier confirms the submission, the status of each Requirement Section will update accordingly. As the project progresses into other stages, the submission status for each Section and Stage will update accordingly.
8	If a Supplier decides to decline the invitation, they can do so by clicking on Decline. They will be given the option to write a message for their reason of declining as show in the image below.

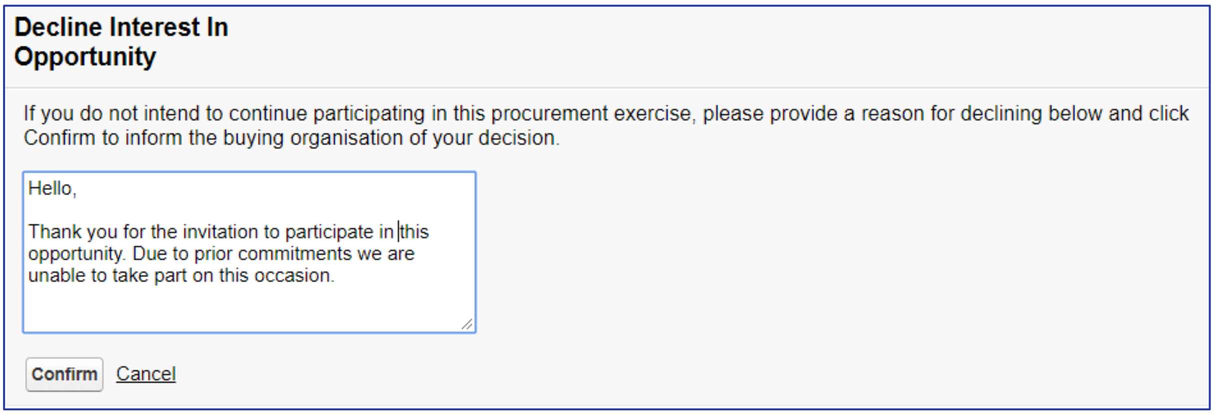

Home
My Proposals and Quotes » C0767 - Reprographics » Product/Service Details » 2
Propsal
2 Please attach your Proposal documentation here, check the 'Complete' box and Save when finished.
Action
Type
Title
Description
Edit » View » Delete
Attachment
1_ Background Information
test
Attach File
Add Note
Required / Optional
Required
Response Status
Completed ?
Save
Back


Home
My Proposals and Quotes » C0054 - Health Services » Stage 2 - Section 1
Stage 2 - Section 1 Section
Completion Status :
50%
If you prefer, you can also Work Offline
a
Back to Summary

and Rich Text Area:



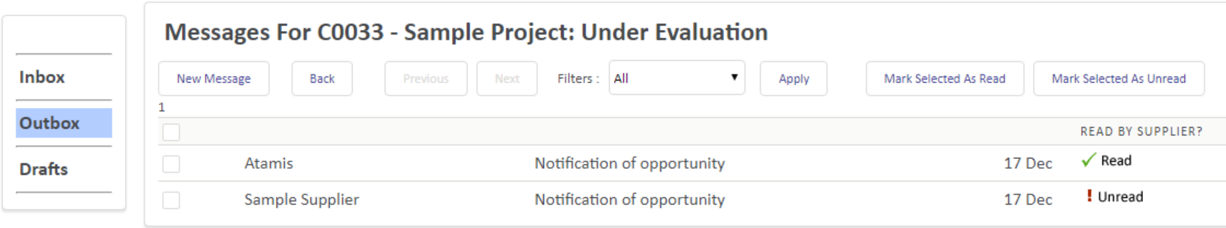
Note: If a Supplier Bidding completes some or all of their Responses but omits to **click** *`Submit`*, the Responses they entered will still become visible to internal users at the appropriate time.



Message Centre

Both Buyer and Supplier users can manage their correspondence using a Message Centre. Suppliers access the Message Centre from their Home Page.

To access the Message Centre for a Project, from the New Messages menu of the eSourcing Console, click **Message Centre**.



The Message Centre operates like most email systems, with an Inbox, Outbox and Drafts folder.

Procurement Team Members with the property `Answer Clarification Questions` will receive an email when a supplier creates or replies to a dialogue. A link on this email will take the user to the Dialogue page.

Click on a message to view the dialogue and optionally click **Reply** or **Reply to All**. Note that if you are using Reply to All from a clarification question that a supplier has asked, you will be able to anonymise the question and sender before sending your reply.

The system keeps a record of when each Message in a Dialogue has been read.

Dialogues with individual suppliers can also be accessed from the Supplier Bidding page on the Suppliers tab.

Opening Responses

To start viewing Responses after the submission deadline, locate (or create) a Task of type *Start Evaluation* and click **Do Now**.

Select one Requirement Section if you are evaluating sections sequentially, or alternatively select all Requirement Sections.

On the next step, select which Suppliers you wish to evaluate. The options available on this page are determined by the Procurement Procedure the Project is following. The Procurement Procedure uses a field called Treatment of Partial Submissions. There are three options:

- Allow user to select suppliers with both partial and complete submissions

- Exclude partially complete submissions but allow user to select suppliers with complete submissions
- Exclude partially complete submissions and enforce evaluation of complete submissions

Completing this action will generate an email to all Evaluators with a link to the relevant evaluation page. See Evaluating Responses for more details on evaluation scoring.

To view Responses:

1 Select a Supplier Bidding from the Suppliers tab

2 Select the Responses or Moderation tab and select a Section

3 Either select a Response and page through using Prev/Next buttons

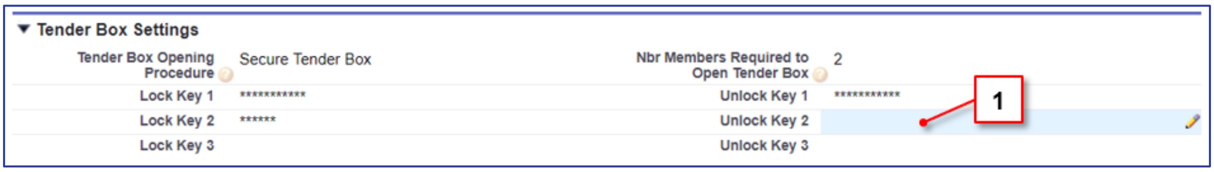
4 Or click **Response PDF** from the Response Section page to view all responses in one file

Conditions for Viewing Responses

If the Project uses a Procedure that does NOT enforce the Response Window then users will be able to view supplier Responses prior to the Response Window Closes Date.

Otherwise Responses cannot be viewed until a user clicks **Do Now** on a Task of type *Start Evaluation*. It will not be possible to complete this task if either:

a) The *Response Window Closes Date/Time* has not yet passed, or
b) It's a Secure Tender (Procedure has the property *Tender Box Opening Procedure* = Secure Tender Box) and one or more *Unlock Key* does not match the corresponding *Lock Key*.

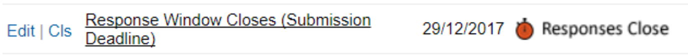


Number	Description
1	To unlock a tender box, locate the Tender Box Settings section on the Project page. Double-click on the **Pencil icon** next to the relevant `Unlock Key` field and enter the same value as was used in the `Lock Key` field.

All Key field entries are audited by the system.

Extending the Submission Deadline

To grant all Suppliers Bidding more time to complete their Responses, locate the Task with the *eSourcing Milestone* of Responses Close:



Edit the Task and change the *Due Date* and/or the *Time of Day* fields and click **Save**.

Late Submissions

In exceptional circumstances authorised users can grant individual Suppliers Bidding more time to submit their Response. This is only possible *before* the *Start Evaluation* Task is done.

To grant a Supplier Bidding more time, open the Supplier Bidding record, locate and check the box *Late Submission?* and click **Save**. To withdraw their late access, uncheck the box.

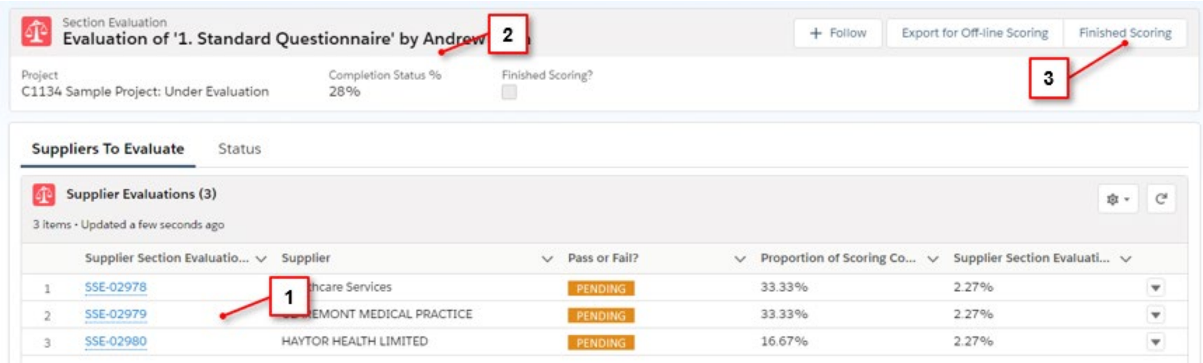
Changes to the *Late Submission?* field are recorded in the audit trail.

Evaluating Responses

To start evaluating Responses, click **Do Now** on a *Start Evaluation* Task as described in the Opening Responses section. This Task will also generate email alerts to all Section Evaluators for the Project that should have already been set up. A link on the email will direct the Evaluator to the appropriate Section Evaluation page.

Instructions for Evaluators
If you received an email informing you to start evaluation, follow the link to access the Section Evaluation page. Alternatively, from the Home Page locate the relevant row in *My Evaluations* and click on the link (e.g. SE-20098) to open the Section Evaluation page.

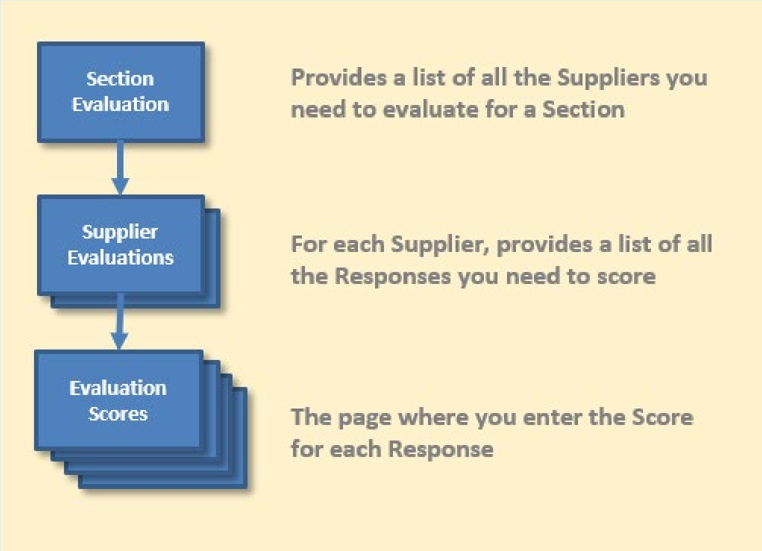
Section Evaluation Page



Number	Description
1	Accesss supplier responses from this list to enter your evaluation scores
2	As you work through your evaluation, your Completion Status will increase
3	When you're done, click **Finished Scoring**

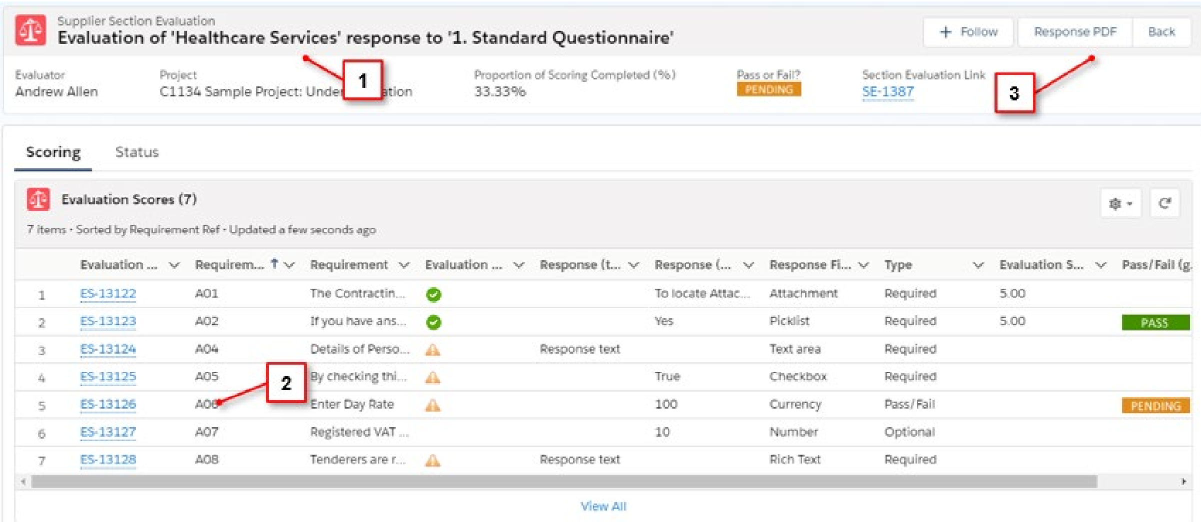
Note: Some responses may require you to select Pass or Fail rather than enter a score. Each supplier's overall Pass/Fail status is shown on this page. If you mark just one response as a Fail, it will display as a Fail on this page, indicating you may not need to complete any further evaluation.

Tip: When scoring responses there are three main types of page that, as an Evaluator, you'll need to become familiar with:



Supplier Evaluation Page

The Supplier Evaluation page lists all of the Responses an Evaluator needs to score for the selected



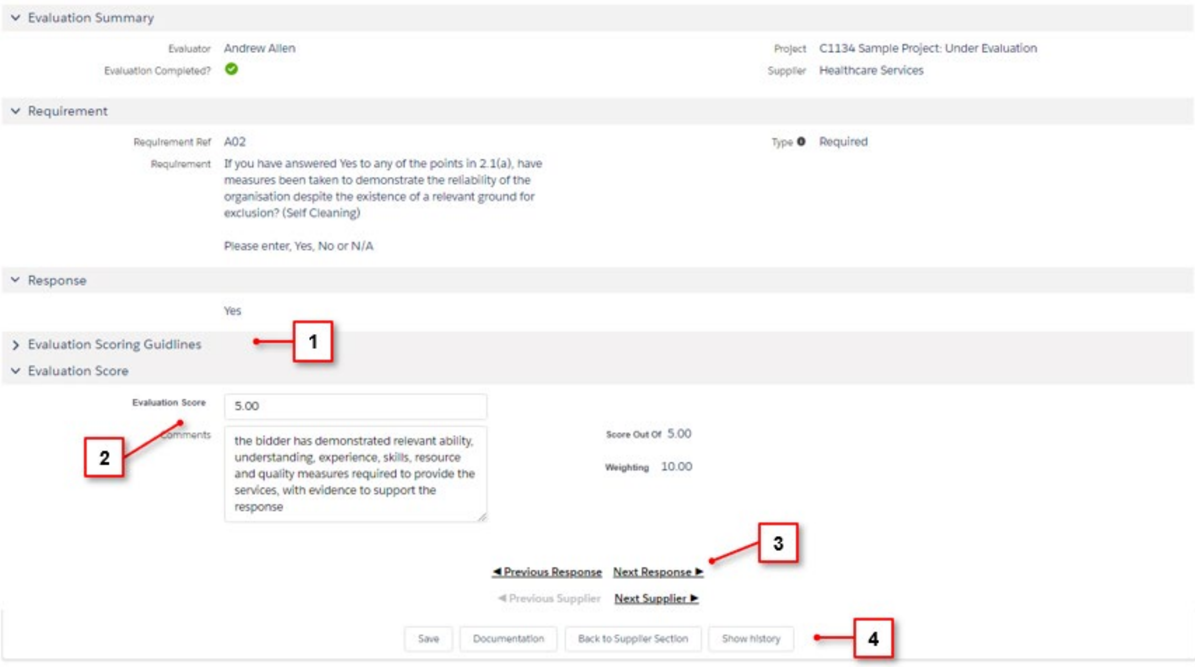
Number	Description
1	The header tells you which supplier and which section you're reviewing
2	Access the **Evaluation Scores** page from these links. You'll see the green tick against Evaluation Scores you've completed

3	Click **Response PDF** to download the responses assigned to you for evaluation. This function does not download any attachments related to attachment type responses. IMPORTANT: The PDF document downloaded may contain confidential information. Please dispose of this information securely. Click **Back** to return to the Section Evaluation Page

Note: Some Evaluation Scores are automatically scored based on pre-determined pick-list values or price algorithms. You can review and update these scores if you wish to.

Evaluation Score Page

The Evaluation Score page displays a description of the Requirement, the Supplier's Response and your Evaluation details:



Number	Description
1	1 Expand and collapse sections for convenience.
2	2 Enter your score and comments, taking into consideration the Score Out Of field and the Evaluation Scoring Guidelines.
	3 Use either Next Response (stays on the same supplier), or Next Supplier (stay on the same question); similarly use the Prev Response and

	Prev Supplier to step back. Buttons are greyed out when you've reached the beginning/end of each list.
4	4 Click Save to save your changes Click Documentation to see the documentation that was provided to suppliers Click Show History to display an audit trail of scoring changes

The layout of this page will vary depending on the type of Requirement:

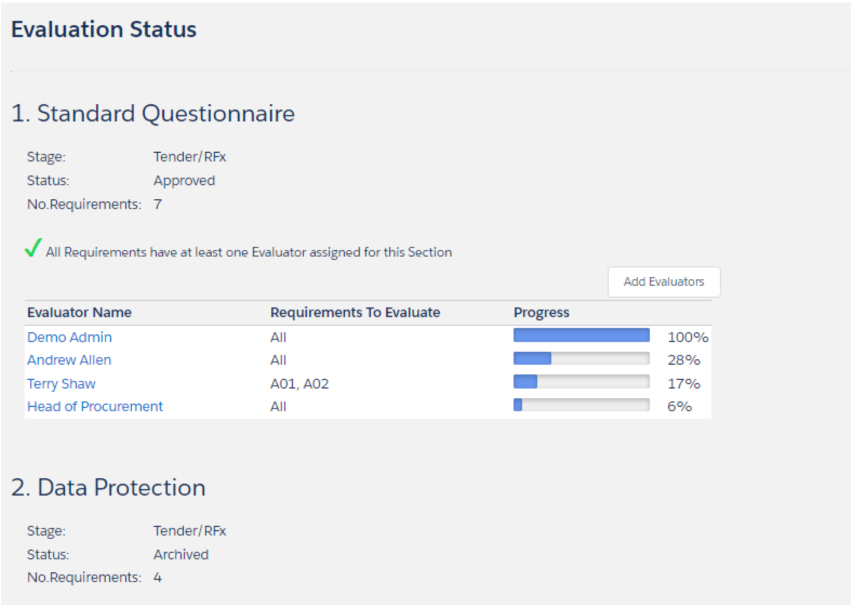
- For Requirements of type "Pass/Fail" you'll be prompted to select Pass or Fail rather than enter a score
- Some records may prompt you to select a score from a picklist
- For Requirements that asked for an attachment, these will be accessible from a hyperlink. Click on the link to open a preview and/or download the document from a new tab on your Browser.

Indicating Evaluation Finished

When you've finished, click **Back to Supplier Section**, then click **Back** again and click **Finished Scoring.** This will notify the procurement lead.

Monitoring Evaluation Progress

To get an overview of which Sections have been evaluated and which are outstanding, from the eSourcing Console, click on **Evaluation status.**



Aggregating Scores

The evaluation process described above results in individual scores being recorded, but no aggregation or averaging of evaluation takes place.

When all scores have been completed, from the Project page, click the **Evaluate Scores** button. You will be prompted before this action runs. The action will:

- calculate (or re-calculate) the weighted average of the scores entered by all Evaluators for all Suppliers Bidding and records the outcome of this calculation on the Supplier Bidding, Response Section and Response pages
- roll-up the outcome of all Pass/Fail questions such that if any one Pass/Fail question is Failed then the supplier's Response Section fails
- make the overall evaluation results visible to system users (individual evaluator scores will not be shared)

Supplier Section Scores

The following equation is used to calculate the *Supplier Section Score* for each supplier:

$$\frac{\sum \text{Mean Average of all } \textit{Evaluator Scores} \times \textit{Evaluation Weighting}}{\sum \textit{Evaluation Max. Score} \times \textit{Evaluation Weighting}} \times 100\%$$

The *Supplier Section Score* will always be a percentage figure between 0% and 100%.

Overall Supplier Score

The following equation is used to calculate the *Supplier Score* (i.e. the overall score) for each supplier:

$$\frac{\sum \textit{Supplier Section Score} \times \textit{Section Weighting}}{\sum 100 \times \textit{Section Weighting}} \times 100\%$$

The *Supplier Score* will always be a percentage figure between 0% and 100%.

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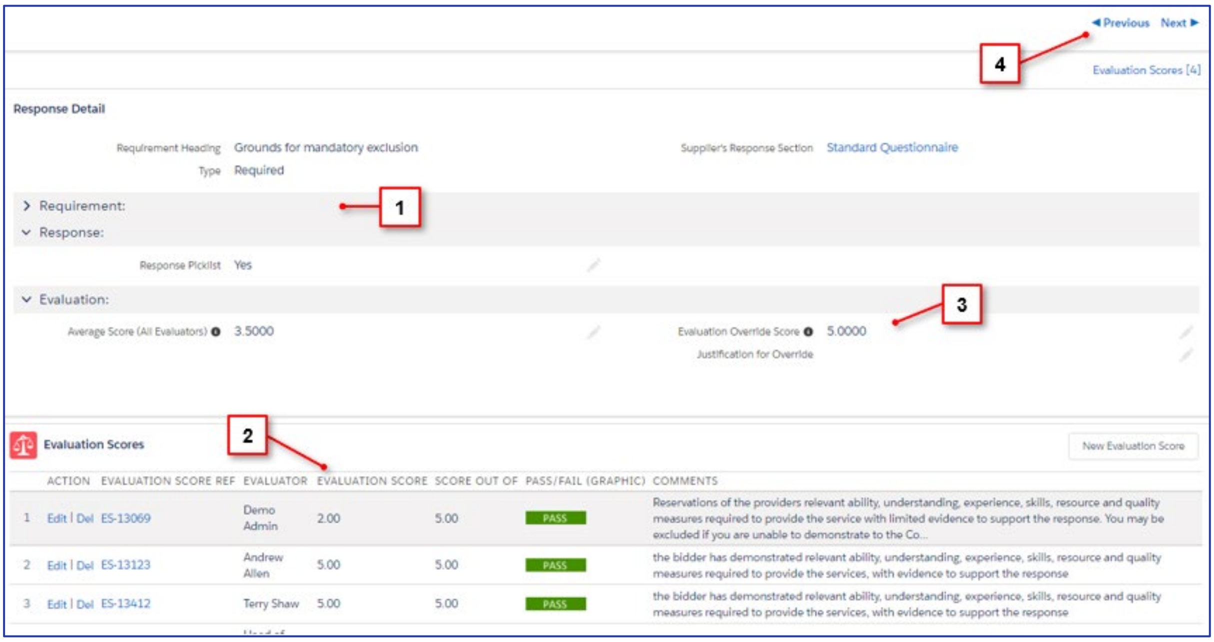
Evaluation Matrix
To view the results of the evaluation, from the Evaluation Status on the eSourcing Console, select Evaluation Matrix Report to run a report summarising each supplier's overall score by Section:

Moderation

To moderate evaluation scores, from the Suppliers tab of the Project, select each Supplier Bidding in turn and select to the *Moderation* tab (sometimes labelled the *Responses* tab).

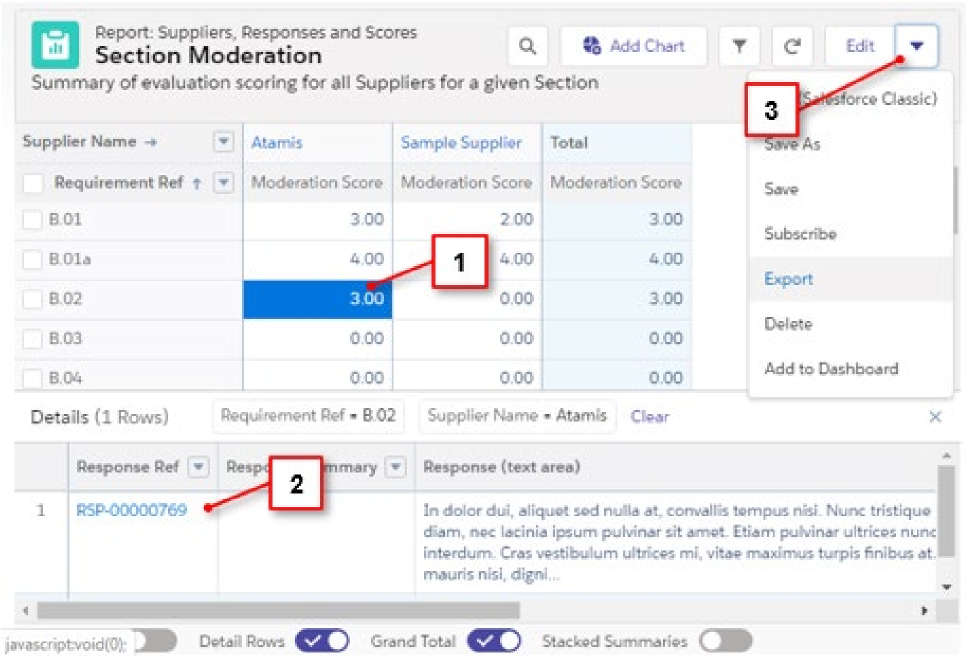
Select a section to moderate and open the first Response record by clicking on the **Response Ref.**



Number	Description
1	Expand and collapse sections for convenience
2	View Evaluator scores and comments
3	Enter an override or moderation score and comment
4	Use Prev/Next to move through the Responses and use the **Back** button to return.

Reviewing Moderation Scores

To review progress of moderation in a Requirement Section, open the Requirement Section from the Requirements tab of your Project and click **Section Moderation** to run a report summarising moderation scores:



Number	Description
1	Select a cell in the table to display the Response and all Evaluator scores and comments
2	Click on a Response Ref to open the Response page to enter moderation details
3	To download all Responses to review off-line, select Export and select the Details only option to Export.

1 Select a cell in the table to display the Response and all Evaluator scores and comments

2 Click on a Response Ref to open the Response page to enter moderation details.

3 To download all Responses to review off-line, select Export and select the Details Only option to Export

Tip: Clicking on the Response Ref above will navigate you away from the report; to keep the report available, open the Response page in another tab in your browser by using ctrl+Click.

Note: After entering moderation or override scores, you may need to re-run the Evaluate Scores action in order to calculate overall supplier ranking depending on the Procurement Procedure being followed. This is determined the Procurement Procedure field Evaluate Scores Immediately.

Indicating Moderation Complete

If the Procurement Procedure you are following has the field `Enforce Moderation Scoring` checked then, when you have finished entering moderation scores for all non-optional Requirements in a Requirement Section, open the Requirement Section from the Requirements tab of your Project and click **Finished Evaluation and Moderation**. This will validate that moderation scores have been entered and prevent further score changes from occurring. The checkbox `Finished Evaluation` is checked on the Requirement Section page to indicate that all evaluation and moderation is complete.

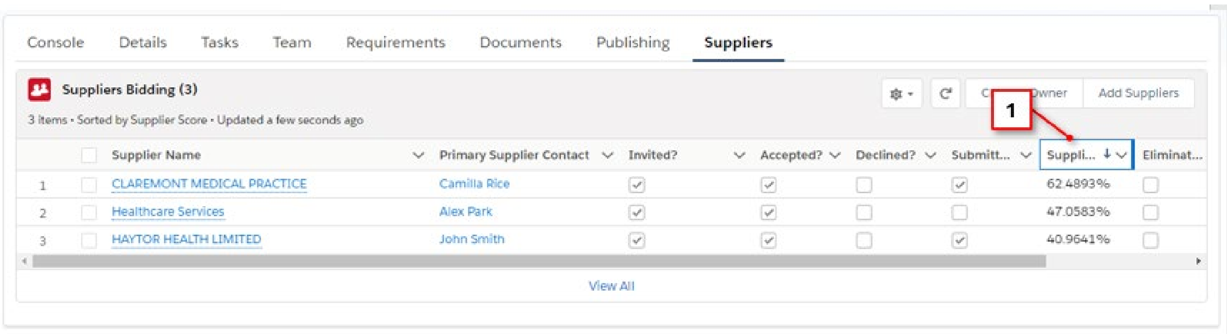
Calculating Overall Supplier Ranking (Evaluate Scores)

When all evaluation and moderation scoring is complete, run the Evaluate Scores action via one of these options:

- From the Evaluation menu of the eSourcing Console, click **Evaluate Scores**
- Locate (or create) a Task with action type Evaluate Scores and click **Do Now**.

The calculation may take a few minutes and you will receive an email when it has finished.

To view the overall supplier ranking, select the Suppliers tab from your project:

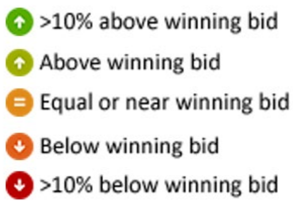


Number	Description
1	If not already ranked in order, click on the Supplier Score column of the Suppliers Bidding related list to sort in ascending/descending order of Supplier Score.

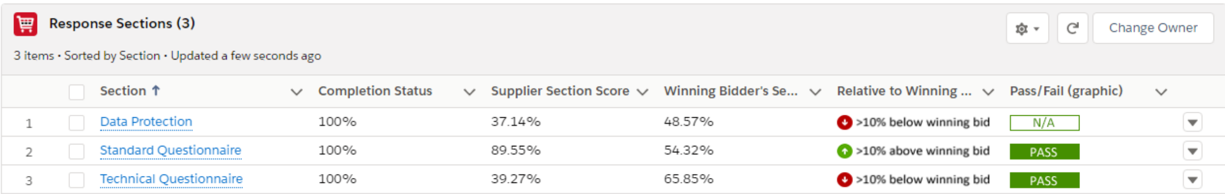
Supplier Evaluation Feedback

Analysing Supplier Ranking

Atamis automatically generates graphics to indicate, for each Section, how each Supplier Bidding ranked relative to the average score and relative to the winning bidder, e.g.:



These graphics can be configured to display on the Moderation or Responses tab of the Supplier Bidding page:



Response Sections (3)

3 items • Sorted by Section • Updated a few seconds ago

Change Owner

	Section	Completion Status	Supplier Section Score	Winning Bidder's Se...	Relative to Winning ...	Pass/Fail (graphic)
1	Data Protection	100%	37.14%	48.57%	>10% below winning bid	N/A
2	Standard Questionnaire	100%	89.55%	54.32%	>10% above winning bid	PASS
3	Technical Questionnaire	100%	39.27%	65.85%	>10% below winning bid	PASS

Drafting Award Recommendation

Suppliers Bidding records have two fields: `Elimination Recommended?` and `Contract Award Recommended?` which you can use to draft your award decision. To set these flags to indicate your decision, edit the Supplier Bidding page from the Suppliers tab, check the relevant box and click **Save**. This action does not send any communication to suppliers or other users about your decision.

Notifying Awarded Suppliers

There are two methods for sending award/reject letters:

- Send a message with or without manually-generated feedback
- Send a covering letter (by email) with an auto-generated feedback report

Tip: If you're preparing your own supplier feedback reports, upload them to an Internal Document Folder. You will be able to use these as attachments when you notify suppliers by email.

Send Message with or without Manually-generated Feedback

To send a standard message to multiple rejected suppliers or to multiple awarded suppliers, from the eSourcing Console, click **Message Suppliers** from the Suppliers Bidding menu. Alternatively, from the Message Centre, click **New Message**. Follow the same instructions as for Invite Suppliers, selecting the Email Template relating to Award or Reject messages.

Messages and read-receipt details can be accessed from the Message Centre in the eSourcing Console.

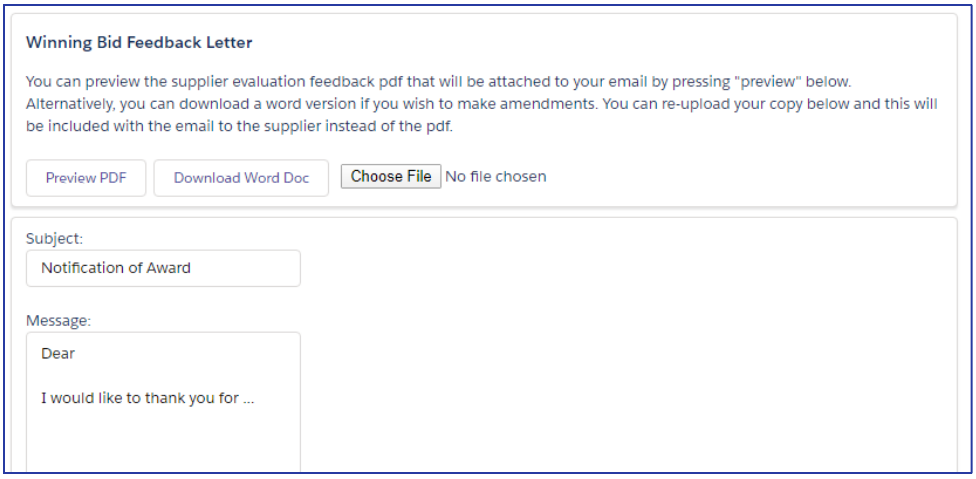
You can also repeat this method to send custom messages to each supplier, by selecting only one supplier and attaching your own feedback report.

Send Covering Letter with Auto-generated Feedback Report

This method is recommended when full on-line evaluation and moderation has been completed and feedback comments have been entered by evaluators and moderators.

To send a successful Supplier a covering letter by email, from the Supplier Bidding page, click **Successful Bidder Letter**.

By default, this action will automatically attach the Feedback PDF generated by the system from the comments entered during moderation, or, if no moderation was completed, from the Evaluators' comments.



- Click **Preview PDF** to check the contents of the feedback report.
- Click **Download Word Doc** if you need to edit the document before sending.

- Click **Choose File** to upload your modified document, or any other feedback document. This will supersede the default PDF document.
- Compile your message and click **Send**.

Messages and read-receipt details can be accessed from the Message Centre in the eSourcing Console.

Tip: Email Templates for Successful and Unsuccessful Bidding Letters can be configured. Please contact Atamis support to configure your email templates.

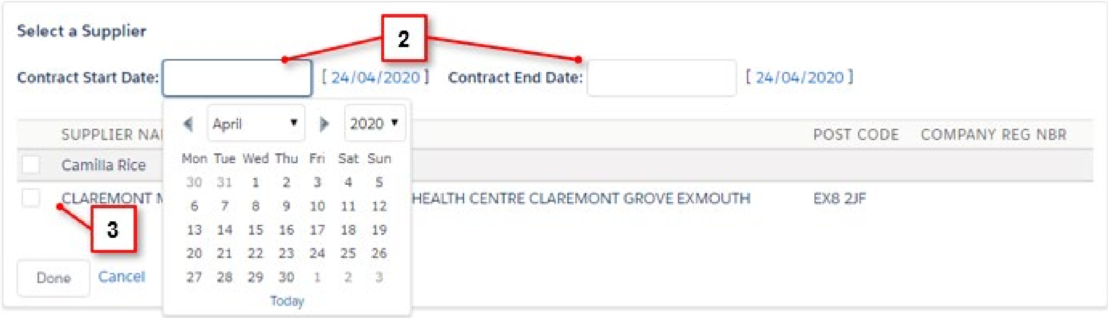
To send an email to unsuccessful Supplier(s), from the relevant Supplier Bidding page, click **Unsuccessful Bidder Letter** and follow the process as above.

Creating the Contract Record (Award Action)

To create one or more Contract records from a Procurement Project, locate (or create) a Task with *Action Type* of Award and click **Do Now**. The process you will follow depends on the value of the *Awarded Contract Record Type* field which is located on the Details tab of the Project:

- Contract (or if the field is blank): creates a single contract
- Framework: gives you the option to create one or more contracts with selected suppliers

Awarding a Contract to a Single Supplier



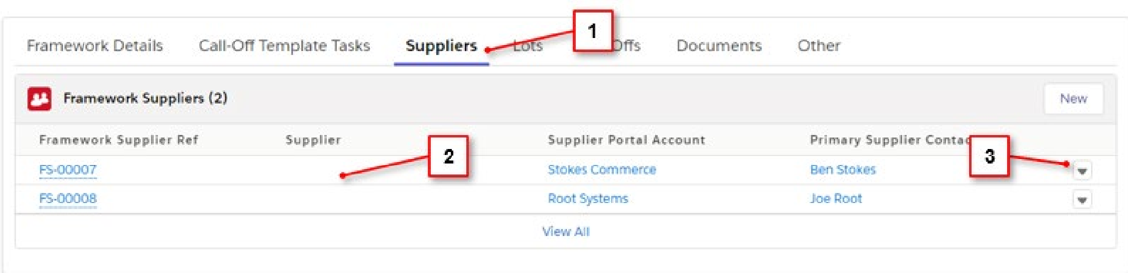
Number	Description
1	Select the winning Supplier Bidding from the list of Portal Accounts that responded to the Project and click Confirm
2	Enter the Contract Start and End date
3	Select the Supplier record associated with the Supplier's Portal Account and click Done. A new contract record with Status = Active will be created with a link back to the procurement project.

Awarding a Contract to Multiple Suppliers Without Lots

Follow the same process as above, but select multiple suppliers.

Tip: If you're not able to select multiple suppliers, from the Details tab, check that Awarded Contract Record Type = Framework.

If your Project does not include Lots, the system will generate a new Contract with Record Type = Framework and Status = Active.

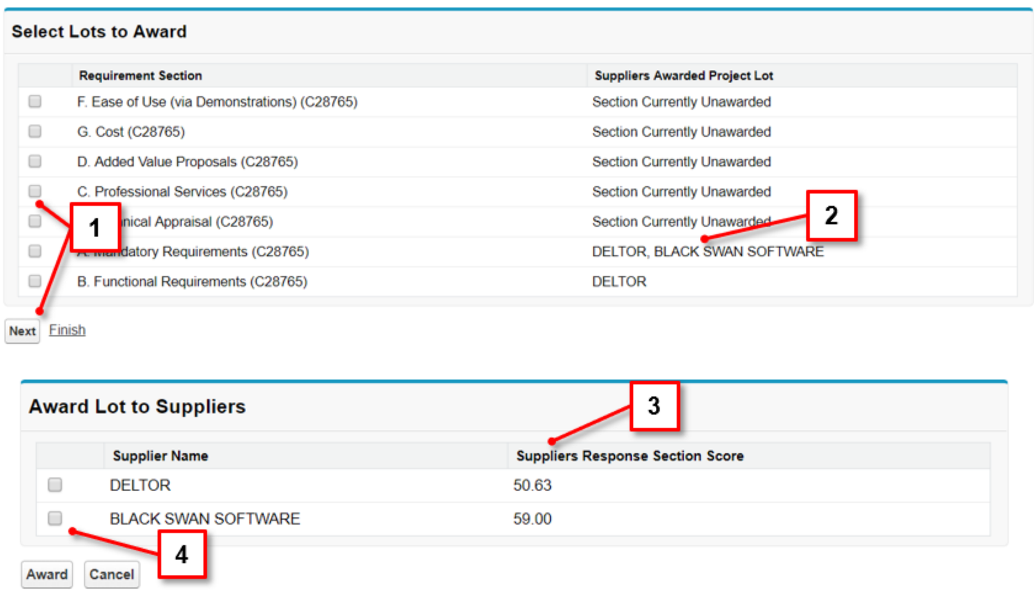


Number	Description
1	The selected Suppliers Bidding will be added to the list of Framework Suppliers
2	The Framework Supplier is not automatically linked to the Supplier record
3	Select Edit from the list item menu to set the Supplier – this field is used when calling off the framework

Awarding a Contract to Multiple Suppliers With Lots

Lots on a Project are created as separate Requirement Sections.

If the Project uses a Procedure with the property `Contains Lots?` the Award process has an extra step:



1 Select a Lot to award and click **Next**.

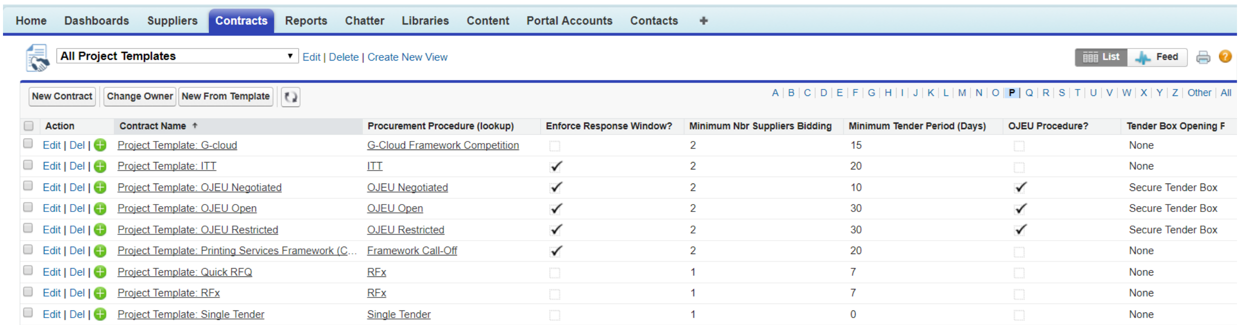
2 The results of the award decisions are displayed here.

Number	Description
1	Select a Lot to award and click **Next.**
2	The results of the award decisions are displayed here.

3	The system displays the Section (Lot) Score for each supplier.
4	Select one or more suppliers and click Award. Repeat this process until all Lots have been awarded then click Finish.

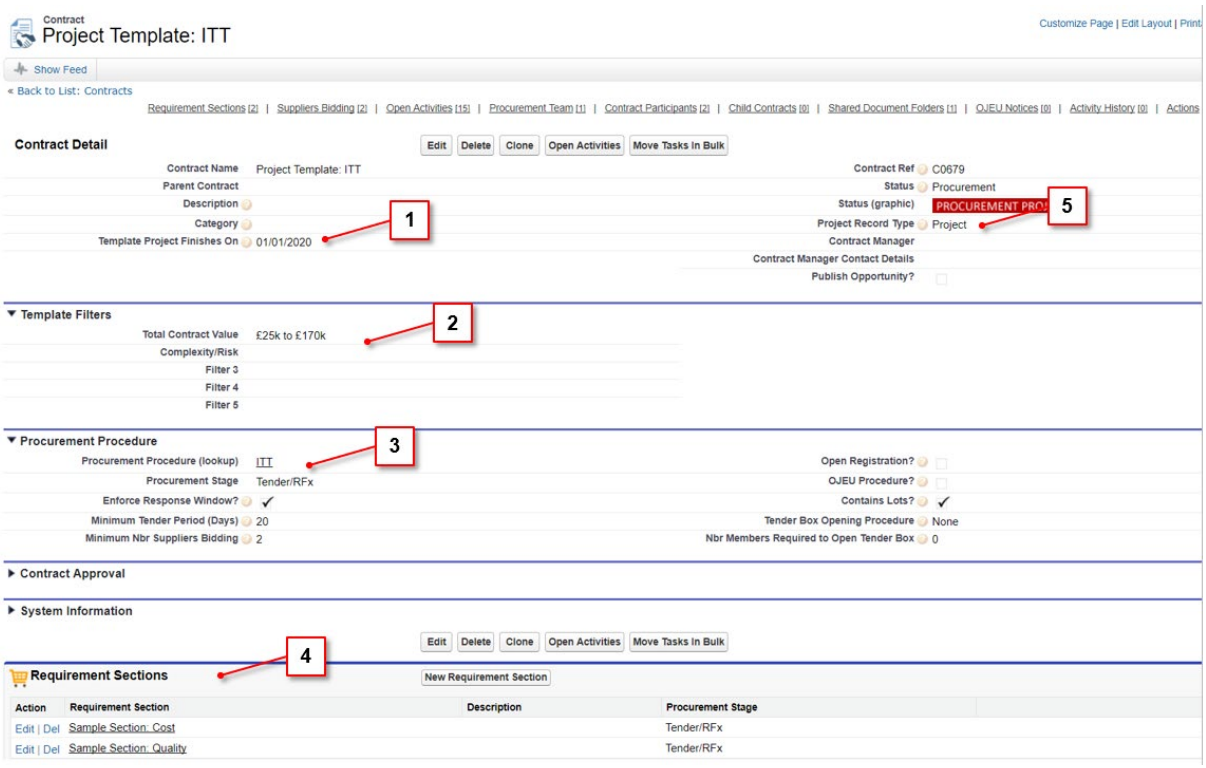
Working with Templates and Procurement Procedures (Advanced use only)

Procurement Templates are a convenient tool for auto-populating Project records for common procurement exercises with standard data. Templates can be created, modified and cloned by authorised users. They can be viewed from the Contracts tab using the List View `All Project Templates`:



Action	Contract Name	Procurement Procedure (lookup)	Enforce Response Window?	Minimum Nbr Suppliers Bidding	Minimum Tender Period (Days)	OJEU Procedure?	Tender Box Opening F
Edit | Del |	Project Template: G-cloud	G-Cloud Framework Competition		2	15		None
Edit | Del |	Project Template: ITT	ITT	✓	2	20		None
Edit | Del |	Project Template: OJEU Negotiated	OJEU Negotiated	✓	2	10	✓	Secure Tender Box
Edit | Del |	Project Template: OJEU Open	OJEU Open	✓	2	30	✓	Secure Tender Box
Edit | Del |	Project Template: OJEU Restricted	OJEU Restricted	✓	2	30	✓	Secure Tender Box
Edit | Del |	Project Template: Printing Services Framework (C...	Framework Call-Off	✓	2	20		None
Edit | Del |	Project Template: Quick RFQ	RFx		1	7		None
Edit | Del |	Project Template: RFx	RFx		1	7		None
Edit | Del |	Project Template: Single Tender	Single Tender		1	0		None

Project Templates use a different Record Type from normal Projects and have a slightly different page layout:



Number	Description
1	The Template Project Finishes On field is a reference date that the system uses to calculate the date for each Task on a new Project. (It also uses the Desired Contract Start Date entered by the user and the dates of all the Tasks held on the Template further down the page). The Tasks on a Template need to be entered such that they finish on the Template Project Finishes On date. If a Task falls on a Weekend, the system will change it to a Friday before. If the Task is a Milestone such us Response Window Closes, the system will change the date to a Monday.
2	Atamis can optionally configure up to five Template Filters for you which are used in the Create Project from Template step to narrow down the selection of Templates. The values are recorded on the Template in this Template Filters section.
3	Each Template must link to a Procurement Procedure. It is possible for multiple Templates to share the same Procurement Procedure if needed. Most of the fields in this section are read-only as they are pulled from the selected Procurement Procedure.
4	The Requirements Sections (and associated Requirement details) is just one example of the data that can be pre-populated on Templates and will be copied to Projects created from the Template.

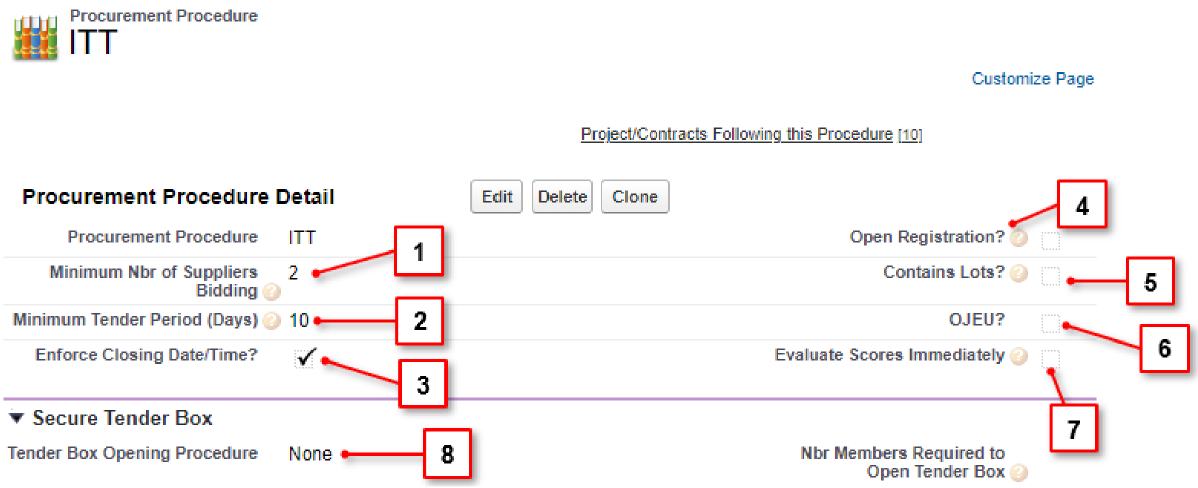
5	If your system uses multiple Project Record Types and Page Layouts (for example, if different business areas use different Page Layouts) then you should specify the Record Type that should be used by Projects created from this Template using the Project Record Type picklist field.

In the Create Project from Template action, the following information is copied from Templates:

- All fields on the Template Edit page apart from:
    - the Contract Name (entered by the active user)
    - the Record Type (set from the *Project Record Type* picklist field)
    - the Owner (set to the active user)
- All Requirement Section records
- All Requirement records within each Requirement Section including:
    - Evaluation scoring guidelines
    - Requirement Options for picklist response types, including auto-scores and pass/fail criteria
- All Section Evaluation records within each Requirement Section
- All Supplier Bidding records (used for Frameworks, approved lists, etc.)
- All Tasks in Open Activities
    - Due Date is set relative to user's Desired Contract Start Date
    - Task Owner on the Project is set to the active user except where the Owner of a Task on the Template is different from the Owner of the Template record itself; in this case, the Task Owner is retained on the Project Task. This feature can be used, for example, to ensure that key approval tasks are always assigned to a Head of Department.
- All Procurement Team records
- All Contract Participants
- All Child Contracts (can be used for contracts with Lots where each Lot needs to be managed as a separate Procurement Project with distinct timescales)
- All Supplier Document Folders and associated files/attachments to be shared with suppliers, such as standard Instructions to Tenderers
- All OJEU Notice records with standard fields pre-populated

Procurement Procedures

Each Procurement Template and Project links to a Procurement Procedure record which determines the governance rules to be applied during the procurement. The controlling fields are as shown:



Number	Description
1	The Minimum Nbr of Suppliers Bidding is displayed on the Project page to provide guidance to users on how many suppliers should be considered. The Suggest Suppliers action uses this figure as a default.
2	If a user attempts to change the Due Date of a Task on a Project with an eSourcing Milestone that is set to either Responses Open or Responses Close, the system will validate that the number of days between the Response Window Opens and the Response Window Closes dates is a greater than or equal to the Minimum Tender Period (Days).
3	If a Project is using a Procurement Procedure where Enforce Closing Date/Time? is checked, suppliers will not be able to make any changes to their Responses after the Response Window Closes date/time elapses. The only exception is where Evaluation has not yet started and the Late Submission? field has been checked on a Supplier Bidding page to allow supplier extra time under exceptional circumstances.
4	The Open Registration? field is used just to indicate to the user that the Project, if published to the Tender Opportunities page, will allow suppliers to register their interest. Note that the checkbox itself does not determine whether suppliers can register interest – this is actually determined by whether the Project has a Task with an eSourcing Milestone of Registration Starts.

5	If a Project is using a Procurement Procedure where Contains Lots? is checked, then at the Contract award stage (user actions a Task on a Project with an Action Type of Award) the user is given the option to award each Requirement Section (Lot) to one or more of the Suppliers Bidding. Otherwise the entire contract is awarded to one or more Suppliers Bidding.
6	This OJEU? field is available for public sector users just for the convenience of distinguishing between OJEU and non-OJEU Projects.
7	If this check box is checked, the overall scores of the suppliers bidding will be automatically calculated as soon as the evaluators start entering their scores.
8	If a Project is using a Procurement Procedure where Tender Box Opening Procedure? is set to Secure Tender Box, then, before a user invites any suppliers, the system will validate that one or more Lock Key fields on the Project have been entered. The number of Lock Keys enforced is determined by the field on the Procedure called Nbr Members Required to Open Tender Box.

Specialist Procurement Procedures

Atamis TM can be used to support the requirements of various specialist procurement procedures, some of which will be specific to the public sector.

Multi-Stage Procurements
Multi-stage procurement Template will have more than one Response Window Open and Close milestone. The Template will also have a Task of type *New Procurement Stage*. Click **Do Now** on this Task to move the stage on to the next value in this list:

- Pre-qualification
- Tender/RFx
- Tender/RFx – 2nd iteration
- Tender/RFx – 3rd iteration
- Tender/RFx – 4th iteration
- Etc.

Each Procurement Stage has its own separate Requirement Section(s). The New Procurement Stage Task will mark any Requirement Sections associated with the completed Stage as Archived. It will then give you the opportunity to create a new Requirement Section covering Requirements relating to the new Stage.

Tip: Use the checkbox field *Shortlisted?* to keep track of suppliers to take forward to the next stage.

Contracts with Lots

Assuming all Lots are to be procured through the same process, with the same timescales, it is recommended that you just use a separate Requirements Section for each Lot.

Alternatively, if each Lot is to be procured with different timescales, milestones, etc. then you should set up each Lot as a separate Procurement Project and use the Parent Contract field to link it to the master record. It is possible to save this structure as a Template: when you create a Project from the Template master record, the equivalent child (Lot) projects will be created for you and automatically linked to the master Project record.

Frameworks and Call-Offs

If you have awarded a Framework to multiple suppliers you can set up a Call-off Template with the Suppliers Bidding already added. When a user creates a Project from the Call-off Template, the approved suppliers will already be listed in the Suppliers Bidding section and the user can select which to invite to tender.

Dynamic Purchasing Systems
The process for calling off a DPS is as described in the Frameworks and Call-Offs section above.

The master DPS project itself need to:

- use a Procedure with the property *DPS* = TRUE
- have a *Response Window Closes* date set to a future date that reflects the last opportunity that a supplier can register for the DPS
- the project must not have multiple stages
- have a Requirement Section containing the pre-qualification criteria if required
- be published to the Tender Opportunities Site

Tip: Use picklist Requirements of type Pass/Fail and set up Requirements Options with Pass/Fail criteria. This will speed up the decision process.

With the above settings, suppliers can register their interest and complete qualification criteria and submit their response at any time.

Internal users are notified when a new supplier submits their Responses to the DPS criteria. If Pass/Fail auto-scoring has been set up, you can use the *Start Evaluation* Task and the *Evaluate Scores* button to evaluate whether the supplier qualifies for the DPS. If they do, you add them as a Supplier Bidding on the DPS Call-Off Template.

Contract Approval Workflow

Atamis can configure a custom process in order to guide the completion of a procurement procedure, and to ensure that key stakeholders approve the terms of contracts. A simple sample structure is outlined below, but Atamis is able to significantly customise and expand this structure:

Number	Description
1	1 When an Approver is selected, and the Status is set to Sent for Approval, they will be notified via email.
2	2 The Approver may Approve or Reject the contract. If they Reject, the Owner receives an email notification.
3	3 The Approver may also provide feedback on their decision.
4	4 The Approval Date field may only be set at the time at which the contract is approved.
5	5 Once the first Approver has completed their approval processes, the second Approver is notified via email.

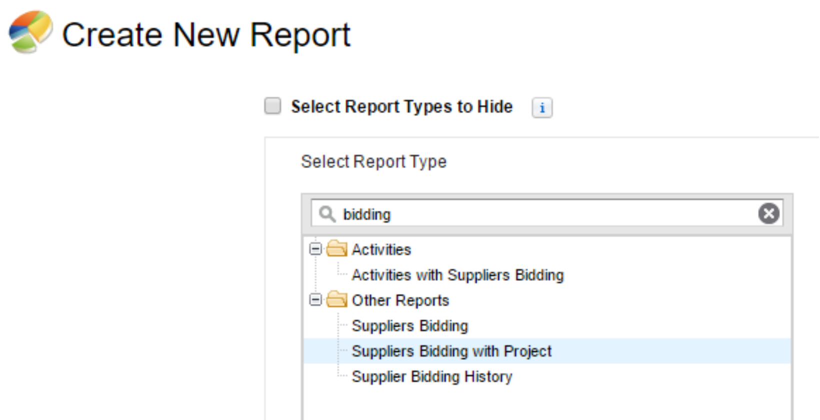
Further approval configurations, including conditional approval and parallel approval, are also available on request from support@atamis.co.uk.

The final step once a Contract has been approved is to change its Record Type from a Project to a Contract.

This moves the record to the Contract Register, while still retaining the Contract Ref and all information relating to its procurement. The user will be prompted to complete mandatory Contract details including the Supplier and the Start and End Date of the contract.

Project Reports

When generating new reports of Projects that including details of all bidders, use the Report Type *Suppliers Bidding with Project*:



For a simple list of Projects, use the Report Type `Contracts` and add a filter for *Record Type* Equals `Project`.

And for Task Status Reports, use *Activities with Contracts*, adding a filter for *Record Type* Equals `Project`.

For System Administrators Only

System Administrators have the ability to use the Import Wizard for loading records such as:

1. Requirements from a CSV file
2. Export Evaluation Scores for offline scoring and import them back on the system

If you are a System Admin and you would like to use this functionality, please get in touch via our email address support@atamis.co.uk and a member of the team will assist you.

Atamis CM: Contract Management

The Enhanced Contract Detail Page

To make use of these fields you will need access to Atamis CM via a Licence Type of **Enhanced User** or above.

The Enhanced Contract page has all of the features of the standard page, and in addition gives access to the following features:

- Activities
- Contract Document Folders
- Contract Assets
- Procurement Procedure Monitoring
- Advanced Savings
- Contract Parent/Child Relationships
- Variations
- KPIs

These are all explained in detail in subsequent sections.

There are also a number of additional fields available for use on this page which can also be use in Reports and Dashboards. These fields are configurable to your needs, including the name.

Field	Notes
Contract Compliance Type	The type of Contract e.g.; Managed, Spot, Temp
Contract Parent	Allows Contracts to be hierarchically related, for example to a Master Services Agreement
No Fault Termination Clause	Whether such a termination clause exists
Penalty Clause	Whether such a penalty clause exists
Minimum Termination Period	The minimum term of the Contract
Financial Checks Required	If financial checks are required
Date Insurance Last Checked	
Issues/Risks	
Contract Risk Profile	
Risk Score	

CM Activities

The Activity Management features provided within the Salesforce.com platform can be utilised on the Contract Detail page to schedule Contract tasks and events. Events have a start and finish time, e.g. a meeting, while Tasks just have a target completion date (the `Due Date`). See the section on Tasks and Events for further details.

A series of Events can be added, for example to schedule periodic reminders to conduct performance KPI reviews.

Note: periodic activity can also be automatically created from templates – see the Contract KPIs section for more details.

Attachments

File attachments of all types are supported. These can be organised into folders using Contract Documents Folders. Create a folder, click **Upload Files** and follow the instructions. 1GB of file storage is supported and additional storage can be purchased.

Procurement Procedure Monitoring

The Procurement Procedure section allows the establishment of the thresholds above which a particular Procurement Procedure should be followed.

Up to five thresholds can be defined upon a request to Atamis. Then, if the Actual Expenditure on a Contract reaches 80% of the Threshold, a Warning will be displayed in the corresponding Fields. If the Actual Expenditure exceeds the Threshold, a Severe Warning will be displayed.

Procurement Procedure Monitoring

Procurement Procedure	RFQ (up to £30k)	Total Actual Expenditure	£22,966.25
Three Quotes (Over £5k)	Yes	RFQ Limit	Compliant
Tender (Over £25k)	No	Tender Limit	WARNING
Goods/Services (Over £170k)	No	Goods/Services Limit	Under
Works (Over £4m)	No	Works Limit	Under
Waiver Obtained	No	Waiver Limit	Under

The fields on the left are set by users, depending on the procedure which has been followed. The fields on the right determines if the procedure used is suitable for the value of spend, and thus the compliance.

Note: The Total Actual Expenditure field is calculated depending on the Framework settings below. For a non-Framework contract, the Total Actual Expenditure is equal to the Actual Expenditure field. For a Framework contract it is the sum of all Actual Expenditures for that Framework.

Contract Savings

To use Contract Savings you will need access to Atamis CM via a Licence Type of **Enhanced User** or above.

There are two configuration options for recording Contract Savings – basic and advanced.

Basic Contract Savings Configuration

Savings information can be recorded against each Contract, either as a % figure or as a total saving achieved over the course of the contract.

Atamis CM calculates two types of annual savings figures: Estimated/Projected and Actual/Achieved.

Estimated/Projected Savings within a Financial Year are calculated using only data found on the contract: the savings figure, the estimated value of the contract, and the start and end date of the contract. It assumes that savings are distributed evenly throughout the lifecycle of a contract.

Actual/Achieved Savings within a Financial Year are calculated by applying the contract's % savings figure to the spend transactions that have been matched to the contract by Atamis CM.

This information is summarised in the Savings Dashboard, accessible from a link on the Home Page.

The dashboard is structured in three columns displaying both Estimated and Actual savings data for:

- The Current FY to-date
- Future FYs (estimated savings only)

Advanced Contract Savings & Benefits Configuration

The advanced configuration enables you to record multiple savings and benefit elements of different types, each applying to a specific timeframe. Where enabled, these will appear in a related list on the Contract Detail page.

Contract Savings/Benefits (9)

New

9 items • Sorted by Applies From • Updated a few seconds ago

	Contract Sa...	Savings Type	Savings Value	Applies From ↑	Applies To	Comments
1	CS-00008	Rate reduction	£2,500.00	22/05/2018	20/07/2019	Woolrdige started using electricall...
2	CS-00089	Cost avoidance	£4,000.00	01/11/2018	31/10/2019	
3	CS-00239	Volume or scope reduction	£6,015.00	23/11/2018	23/11/2019	12% on Catalogue list price nego...
4	CS-00005	Volume or scope reduction	£28,876.00	07/01/2019	29/04/2020	2 full time employees - see suppo...

Savings

Click **New Contract Saving/Benefit**, then Click **Saving** to set up:

- Saving Type
- Savings Amount
- Custom Benefits Measurement Fields
- Applies From
- Applies To
- Comments

Savings reports are created using the Report Type of *Contracts with Contract Savings.* This includes the fields *Projected Savings in This FY, Project Savings in This FY+1*, etc. which calculate the proportion of the saving attributable to each financial year, based on the *Savings Amount* and the *Applies From* and *Applies To* dates.

Note: The system assumes that savings are distributed evenly across the selected time period. The minimum timeframe for a savings entry is one day.

This feature can easily be extended to record broader Contract Benefits such as environmental, or labour-saving benefits. Please contact Atamis for further details.

Benefits

Click **New Contract Saving/Benefit**, then Click **Benefit** to set up:

- Benefit Type
- Applies From
- Applies To
- Benefit Amount
- Comments

- Benefit Value Override

Benefit Types will be defined in advance, and can apply to a variety of situations; tonnes of $C0^2$ offset, number of jobs created, hours voluntary work generated, etc. The non-editable field `Guidelines for Entering Benefit Amount` contains instructions specific to the benefit type used.

It is possible to click directly on **Benefit Types**. This will show a Detail Page which gives more information on the Benefit Type, including the `Benefit Value Multiplier`. The Multiplier enables a financial value to be given to each ‘unit’ of Benefit.

If the `Benefit Value Multiplier` is not needed, instead use the `Benefit Value Override`. This will enter a raw, fixed, financial value associated with the Benefit Record.

Contract Variations

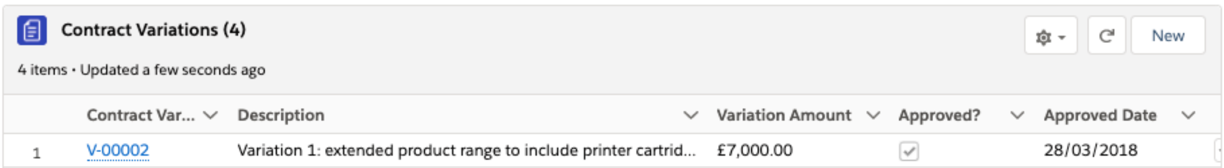
To use Contract Variations, you will need access to Atamis CM via a Licence Type of **Enhanced User** or above.

There are two configurations for recording Contract Variations within the Atamis system;

a) Using Contract Variations Records
b) Using Parent/Child Relationships

Contract Variation Records

Contract Variation Records can be used to record and manage the approval of financial variation orders. These are viewed and managed on the Contract Page:



Using the related list on the Contract Detail page (where enabled), click **New Contract Variation** to set up details of a variation order:

- Description
- Variation Amount
- Requested Date
- Requested By
- Justification
- Approved?
- Approved Date
- Implemented Date
- Comments

Workflow Rules can be applied by your System Administrator to alert designated users with appropriate permissions to approve Contract Variations. Unapproved, or pending Contract Variations can also be summarised via a Dashboard.

Note: When applying variations to a Contract, it is important to also adjust the *Estimated Value* field. This ensures that fields such as the *Contract Usage* bar remain up-to-date.

Validation checks run in the background to ensure that a Contract's *Estimated Value* is equal to the *Initial Estimated Value* plus the sum of all approved Contract Variations, and the results are displayed via the *Variation Discrepancy Flag*.

To include documentation supporting a Contract Variation, click on the **Contract Variation Detail** page and click on **Upload Files** to add a document to the Variation record.

Parent/Child Relationships
Parent/Child relationships may also be used to record variations in the form of subordinate contract records. In this configuration, Atamis will provide a number of requisite fields:

- Parent Contract
- Contract Type

In order to create a child record and associate it with the main contract record, click the **Contracts Tab**. Then click **New**.

Note: If you have the PM Module enabled, you may be asked to specify whether you are creating a Project or a Contract. To create a Contract Variation, select Contract

Enter the details of the Contract Variation. The Contract Type picklist allows differentiation between different types of variations (contact support@atamis.co.uk to add more values).

The Parent Contract Field is used to subordinate a contract to the original, parent contract. Click on the **Picker icon** to open the Contract Lookup dialog box. Searching for, and selecting, the Parent Contract, will create the Parent-Child link.
Once all details are entered, click **Save** to create the Child Contract. It is possible to view all Child Contracts associated with a Parent Contract from that Parent Contract's page:

Atamis is able to configure automated processes to automatically update the Estimated Value of the Parent Contract with the sum of any Variations. Other automation, for example to the Parent Contract End Date, is also possible. Please contact support@atamis.co.uk for details.

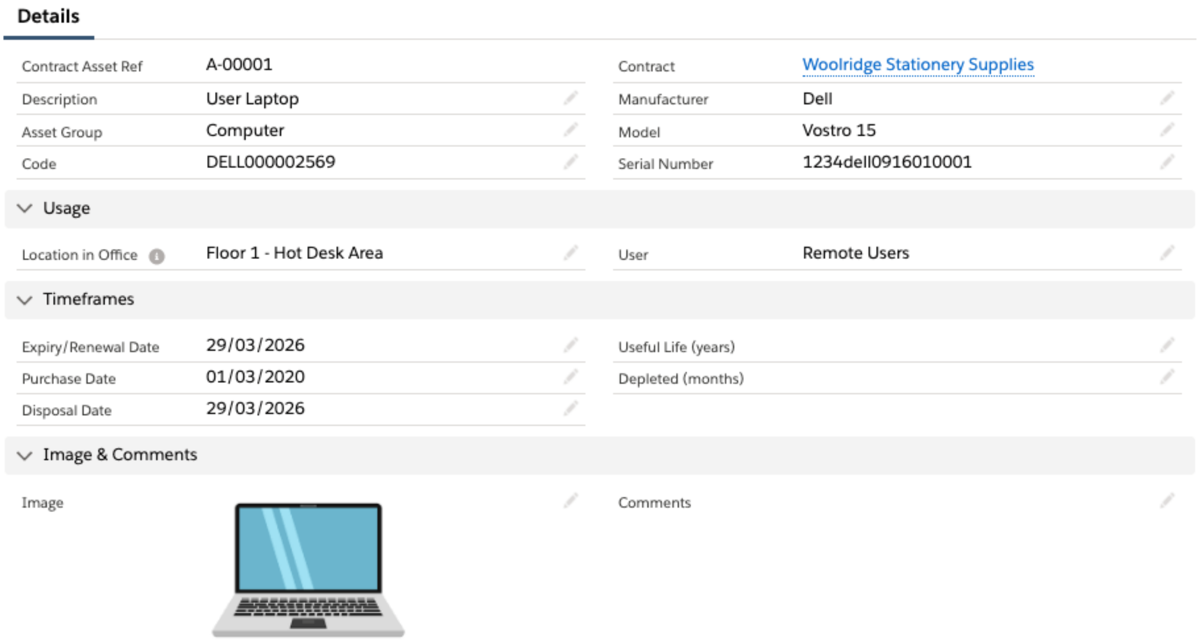
Contract Publishing

Atamis 3.0 allows organizations to selectively publish Contracts to a publicly available portal. The `Publish?` field in the Contract Register Publishing section on the Contract page governs whether a particular contract is made publicly available on the portal.

Atamis is able to restrict which users have permission to publish contracts, for more information contact support@atamis.co.uk.

Contract Asset

Contract Asset functionality can be enabled on Atamis 3.0 to allow users to record additional information regarding assets on a contract such as laptops, desks or other. The system can be configured further to issue email notifications to contract managers when Expiry Date are near. Please contact support@atamis.co.uk for details.



CM Reports and Dashboards

For a full list of CM Reports, run the report “List of Reports” and add a filter for Folder Equals “Contracts”.

Contracts Dashboards

Charts referring to Contract Compliance, Contract Usage, Projected Savings this Year, Achieved Contract Savings this Year, Contract Renewals: Proximity to End. From here you will be able to access the following Dashboard (or choose these from the drop-down list).

Contracts: Compliance

Charts directly relating to contract compliance, including Last 4 Full Quarters, Last 3 months, Previous 3 months, Departments with most off-contract spend, Suppliers with most off-contract spend and Categories with most off-contract spend.

Contracts: Renewals

Charts reporting on Proximity to End Date, Contracts with Less than 3 months to expiry and Contracts with 3 to 9 months to Expiry.

Contracts: Savings

Charts displaying Previous FY Savings, This FY Savings, Most Recent Savings Projections and Future FY Savings. (Requires a Licence Type incorporating the Contract Management Module)

Contract Risk Profile: Quadrants

X-Y scatter plots for each of the four quadrants for risk profiling Contracts.

Atamis SRM: Supplier Relationship Management

The Atamis SRM module provides users with access to:

- Activity Management (Tasks and Events) for Suppliers
- Document Management for Suppliers
- Supplier Enhanced Page Layout for additional fields
- Contractor KPI Measurement
- Supplier Risk Segmentation

Atamis SRM Features

You will require access to the Supplier Relationship Management (SRM) Module via a Licence Type of **Enhanced User** or above in order to use these fields and features.

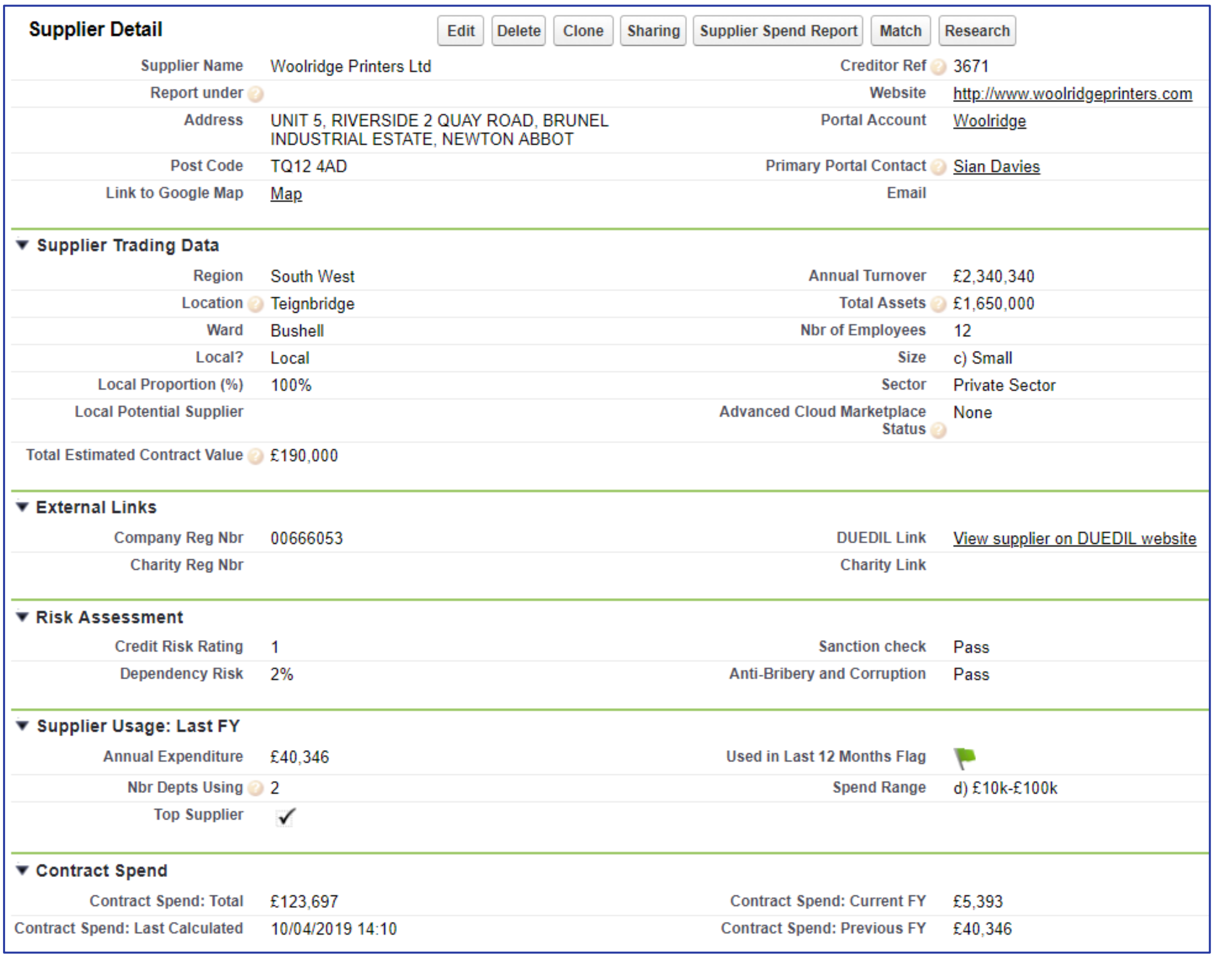
SRM Fields

Field	Notes
Insurance Limits	Professional Indemnity, Public Liability and Employer's Liability insurance limits
Insurance Renewal Dates	Renewal dates for the above insurances
Contact Details	Name, title, email and telephone details for up to 5 external or internal contacts
Quality Standards	Recording of quality standards required and held
Preferred Supplier Status	Status values can be customised
Risk Profiling	Financial, H&S, Information Security and other risk categories
Compliance with Procurement Policy	For recording outcomes of internal review and approval procedures
Supplier in Use	A checkbox set by the system to indicate that the supplier record is linked to a project or contract in the system
Custom fields	Option to add custom multiple fields of all data types

Performance

There are two methods in Atamis SRM for recording and reporting on the performance of suppliers:

- Against the supplier record - for quick and basic performance scoring (see screenshot below)
- Using Contract KPIs - to monitor supplier performance on each Contract (for detailed KPI monitoring – see Contract section for more details)


Supplier Detail Edit Delete Clone Sharing Supplier Spend Report Match Research

Supplier Name	Woolridge Printers Ltd	Creditor Ref	3671
Report under		Website	http://www.woolridgeprinters.com
Address	UNIT 5, RIVERSIDE 2 QUAY ROAD, BRUNEL INDUSTRIAL ESTATE, NEWTON ABBOT	Portal Account	Woolridge
Post Code	TQ12 4AD	Primary Portal Contact	Sian Davies
Link to Google Map	Map	Email	

Supplier Trading Data

Region	South West	Annual Turnover	£2,340,340
Location	Teignbridge	Total Assets	£1,650,000
Ward	Bushell	Nbr of Employees	12
Local?	Local	Size	c) Small
Local Proportion (%)	100%	Sector	Private Sector
Local Potential Supplier		Advanced Cloud Marketplace Status	None
Total Estimated Contract Value	£190,000		

External Links

Company Reg Nbr	00666053	DUEDIL Link	View supplier on DUEDIL website
Charity Reg Nbr		Charity Link	

Risk Assessment

Credit Risk Rating	1	Sanction check	Pass
Dependency Risk	2%	Anti-Bribery and Corruption	Pass

Supplier Usage: Last FY

Annual Expenditure	£40,346	Used in Last 12 Months Flag	
Nbr Depts Using	2	Spend Range	d) £10k-£100k
Top Supplier	✓		

Contract Spend

Contract Spend: Total	£123,697	Contract Spend: Current FY	£5,393
Contract Spend: Last Calculated	10/04/2019 14:10	Contract Spend: Previous FY	£40,346

Number	Description
1	Performance review are added/edited using this list
2	Details of the review can be uploaded as *an attachment.

Attachments

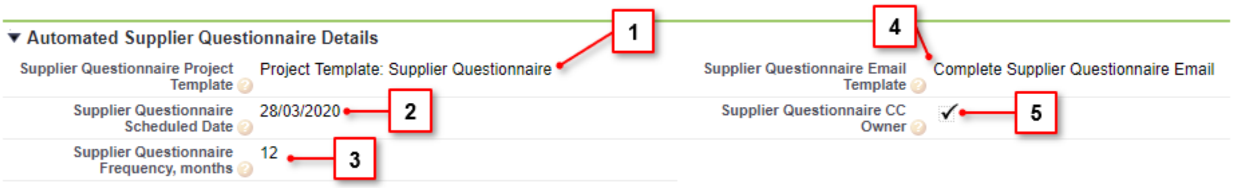
File attachments of all types are supported. Simply click **Attach File** in the Notes and Attachments section and follow the instructions. 1GB of file storage is supported and additional storage can be purchased.

You can also upload Notes to record long textual records.

Automated Supplier Questionnaire

Questionnaires can be set up the same way project templates are being set up on eSourcing. They can have multiple Requirement Sections and requirements of type text, currency, picklist, etc. The engagement with the supplier is based on custom and approved templates, which will be customised as per your requirements. This feature is available for users that have access to the SRM Module. Once the questionnaire is being issued, the supplier will be able to provide answers via the Supplier Portal.

You are able to select and schedule the questionnaire on the Supplier page, section Automated Supplier Questionnaire Details.



1 On this field, **Select** the type of questionnaire you would like the supplier to complete from the drop-down list.

2 Enter the date when you would like the questionnaire to be issued to the supplier.

3 Specify how often should the questionnaire be issued to the supplier in months. With every issue, a new `Project` will be added in section `Contracts` on the `Supplier` page. If you would like it to be issued yearly, enter number 12.

4 Using the drop-down list, select the type of email template you would like to be send to the supplier when the questionnaire is being issued.

5 By ticking this box, the `Owner` of this record will be copied on the e-mail that is being send out to the supplier.

Tip: questionnaires and e-mail templates can be added or modified. Please liaise with your account manager to set up customised questionnaires and e-mail templates.

Depending on the type of questionnaire template you select, the system will generate a `Project` in section `Contracts`, on the `Supplier` page, in line with the chosen `Schedule`

`Dates` and `Frequency` as per image below. The system will name the project using the name of the type of questionnaire has been issued, the name of the supplier and the date when it has been sent to the suppliers.

Contracts — New Contract — Contracts Help

Action	Contract Name	Estimated Value	Contract Usage	Start Date	End Date	Proximity	Status (graphic)
Edit | Del	Supplier Questionnaire - Woolridge Printers Ltd - 2018-07-06						PROCUREMENT PROJECT
Edit | Del	Photocopier maintenance	£500,000.00		01/04/2012	01/04/2014		ARCHIVE
Edit | Del	Printing services	£153,000.00		01/01/2013	15/07/2018		ACTIVE CONTRACT
Edit | Del	Woolridge Stationery Supplies	£37,000.00		01/04/2014	01/09/2018		ACTIVE CONTRACT

Contract KPIs

To set up Contract KPIs you will need access a Licence Type of **Power User** or above.

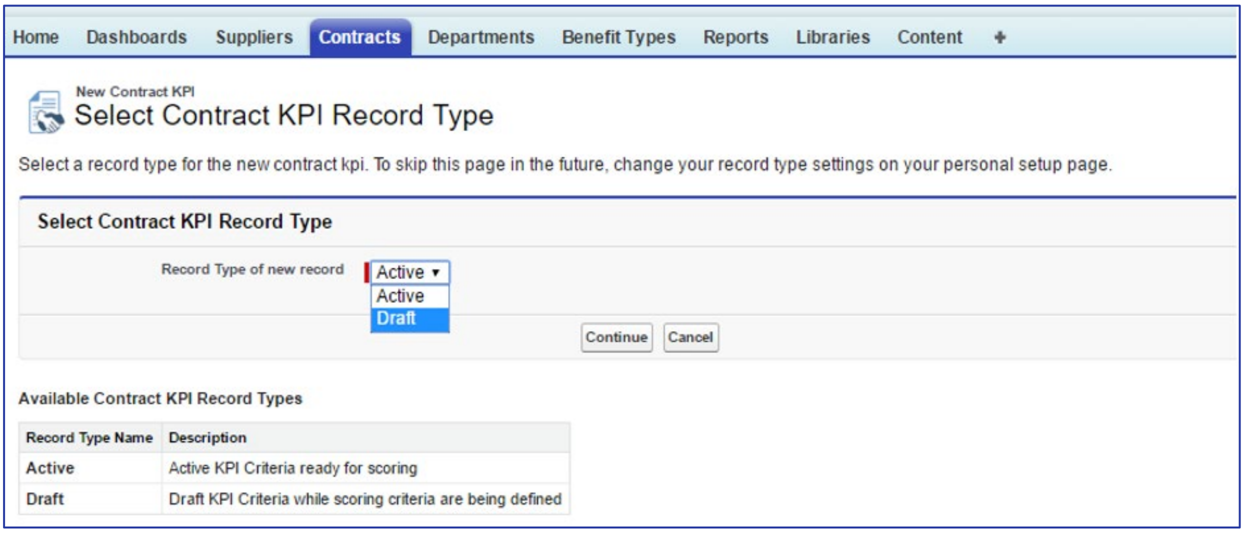
Contract KPIs are a powerful feature for setting up Key Performance Indicators for Suppliers to be benchmarked against on key contracts.

Contract KPIs — New Contract KPI — Contract KPIs Help

Action	Contract KPI Ref	KPI Category	KPI Description	Review Period From	Review Period Up To	KPI Overall Score	KPI Out Of (Max. Overall Score)	Review Date	Reviewed By
Edit | Del	KPI-00000	Quality	Number of correct proofs	01/01/2014	31/12/2014	76	100	16/01/2015	JK
Edit | Del	KPI-00001	Capacity	Number processed per month	01/01/2014	31/12/2014	85	100	16/01/2015	KTE

Contract KPIs can either be entered manually or, for large contracts with multiple KPIs that require regular scoring (e.g. monthly), these can be completed in a Template provided by Atamis Support ready for bulk loading via an Import Wizard.

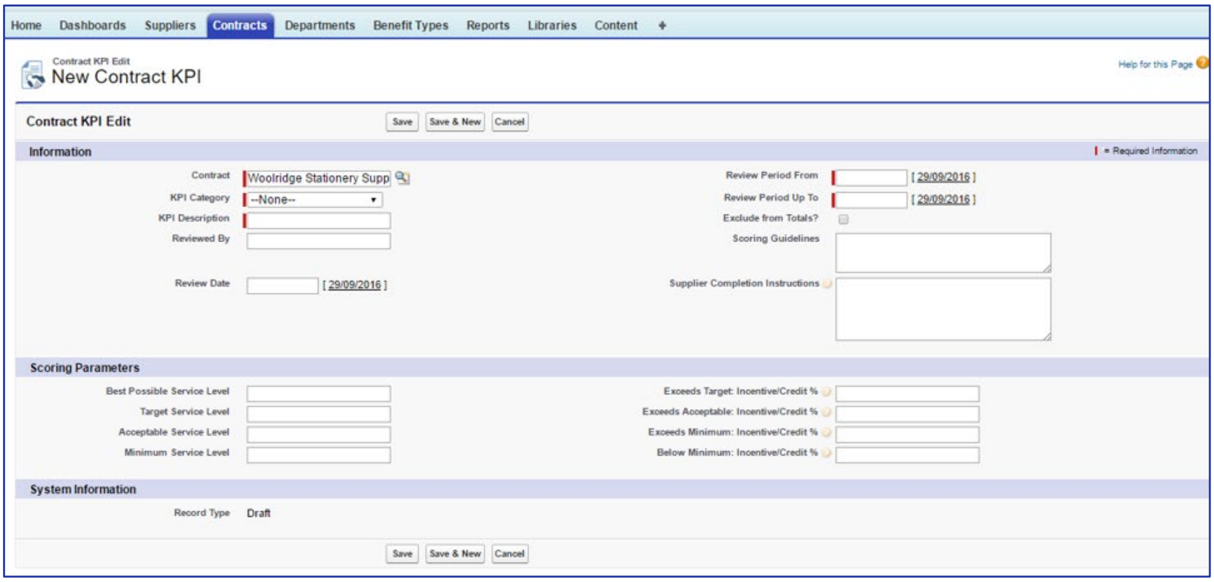
There are two main configurations for KPI Records. It is possible to switch between configurations, but Atamis recommends that both are not used simultaneously.



Draft & Active Scoring

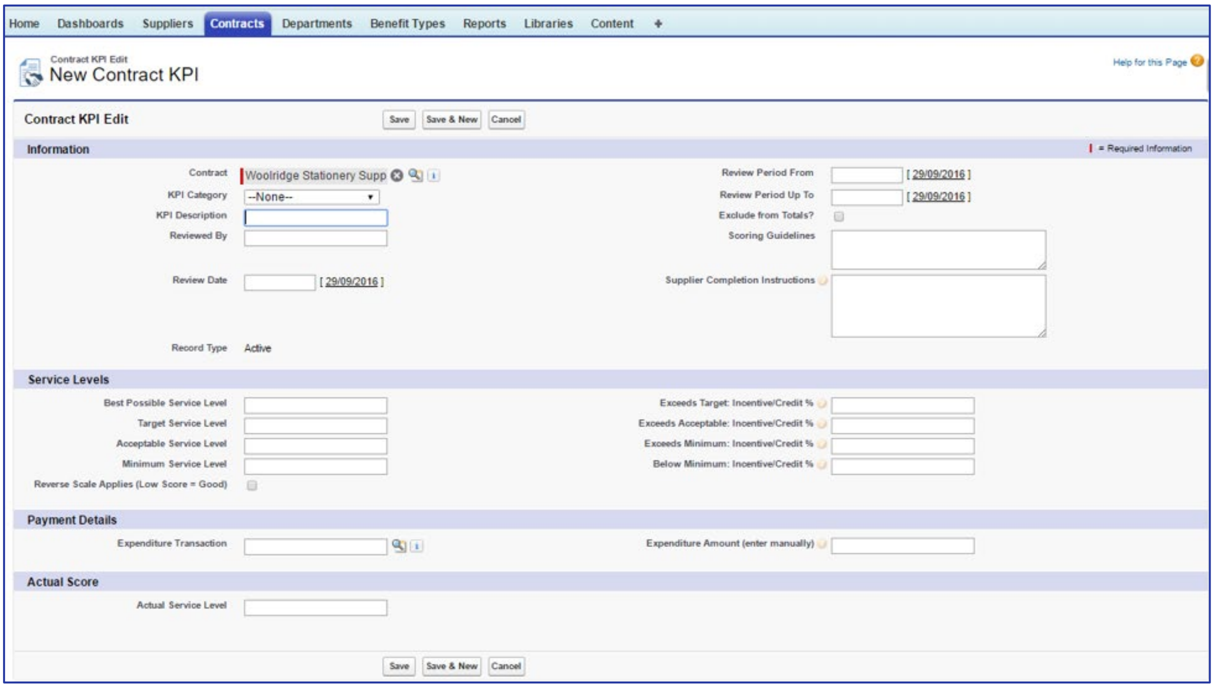
Draft KPIs allow the definition of the characteristics of the KPI, such as the Target Score, Description, etc to be completed in advance. Draft KPIs are excluded from the KPI reports and dashboards available on the Enhanced Contract Detail page.

Once a KPI is finalized, it is changed to 'Active – Scoring', which enables users to enter regular dates and scores, but does not allow them to adjust the characteristics of the KPI established during the Draft phase.



Active Scoring Only

This configuration allows the modification of all fields at all times, and all KPIs are included in KPI summaries.



The standard fields for KPIs are:

Field	Notes
KPI Category (Quality, Customer Satisfaction, Cost, Capacity, Capability, etc)	The area of performance which this KPI records
KPI Description	A more detailed description of the KPI
KPI Actual Score	The score given for this particular KPI record
KPI Out of (Max. Overall Score)	Maximum overall score (locked if Active-Scoring)
KPI Weighting	This allows you to give each KPI a weighting relative to other KPIs
Target Score	The target score for the supplier
Acceptable Target Score	The acceptable score for the supplier
Review Period From	The date from which this KPI will be used. (If KPI scheduling is in use, this is the earliest date for which KPIs will be generated)

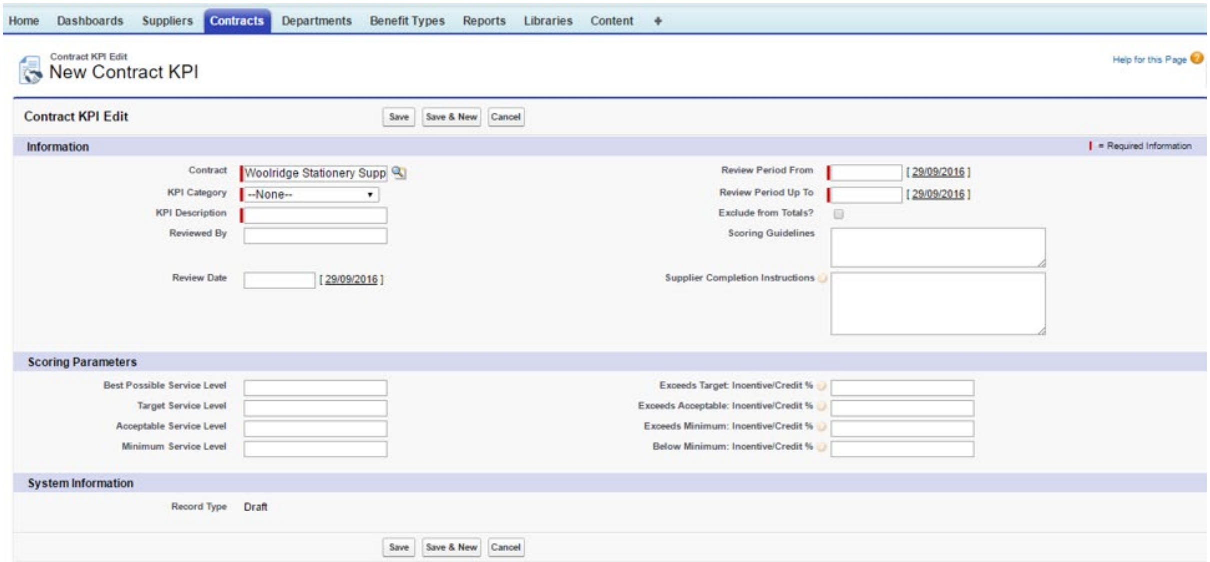
Review Period To	The date until which this KPI will be used. (If KPI scheduling is in use, this is the latest date for which KPIs will be generated)
Review Date	The date on which this KPI should be reviewed
Reviewed By	The user responsible for completing the KPI
Exclude from Totals	If this KPI should not be included in the standard Atamis KPI reports and dashboards

Simple Workflow Rules can be applied by your System Administrator to set automated reminders (email and pop-up) to users required to score KPIs.

Manually Scheduling KPIs

If KPI scheduling is enabled, the KPI page will also feature two buttons, ‘Schedule’ and ‘Unschedule’.

Click **Schedule** to create a sequence of KPI records, based on the `Review Period From` and `Review Period To` fields. These will retain the characteristics of the original KPI, save that the Review Period and Completion dates will be generated according to the specified frequency and dates.

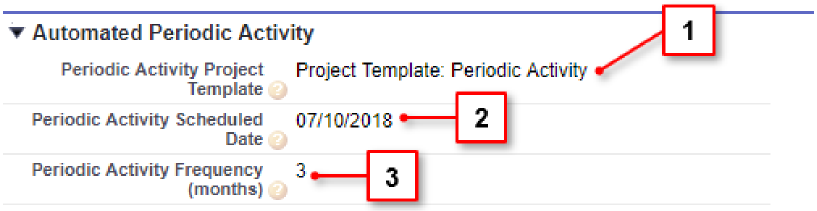


Once KPIs have been created, clicking **Unschedule** will remove incomplete KPIs.

Automatically Scheduling KPIs using Automated Contract Periodic Activity

This feature is not part of the default layout of the `Contract` page, therefore you will have to request for it to the added on.

You are able to select and schedule the periodic activity on the `Contract` page, section *`Automated Periodic Activity.`*



1 From the drop-down list, **select** the *`Periodic Activity Template`*

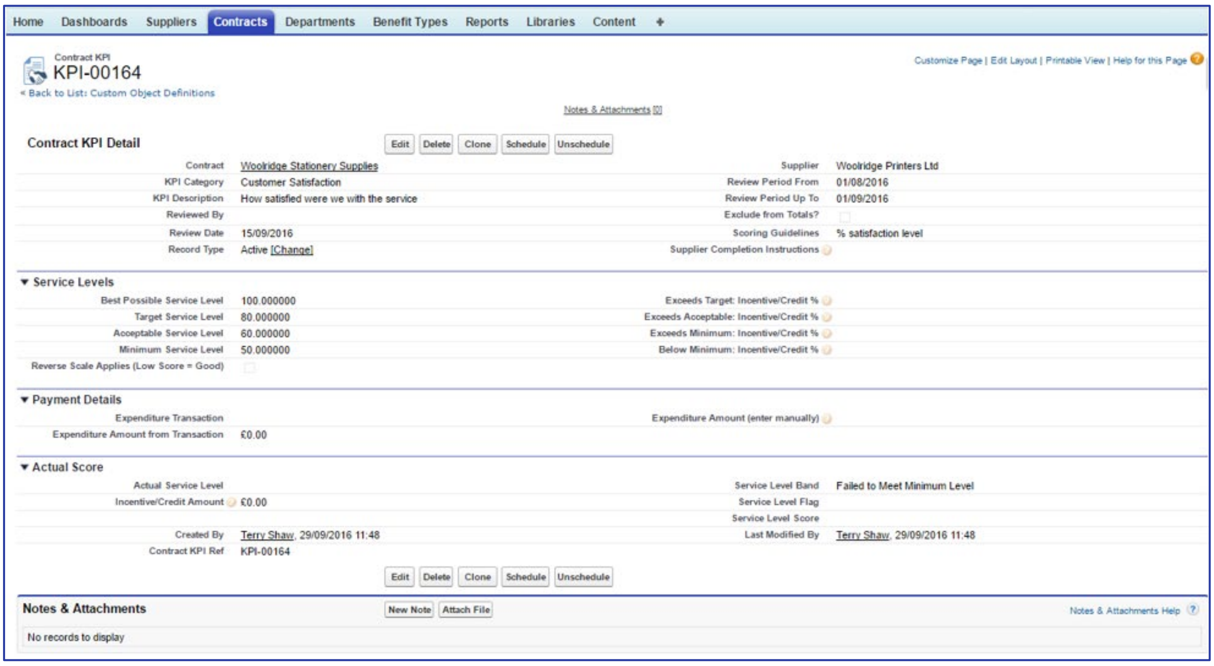
2 Enter the date when the first activity should be issued.

3 Specify how often should the be issued in months. With every issue, a set of activities will be created on the Contract page. If you would like it to be issued yearly, enter number 12.

On the Scheduled date, the system will create a series of Activities to be completed based on the template chosen. The date on the *`Periodic Activity Scheduled Date`* will update to the next schedule date based on the frequency of months you've entered.

Contractor KPI Self-Scoring

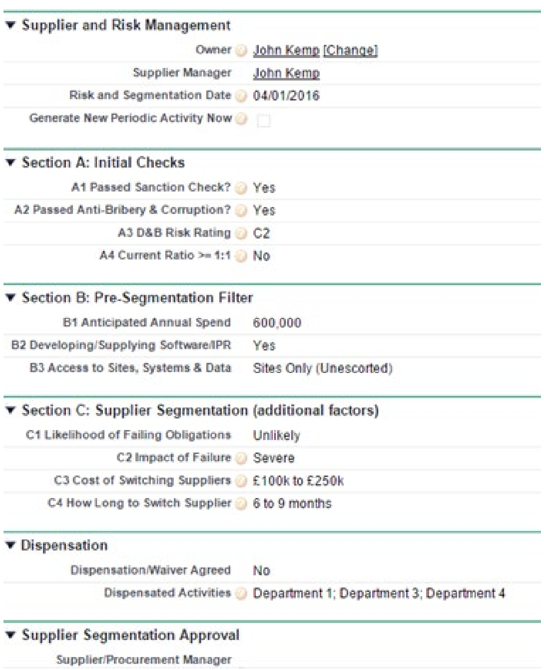
A secure Portal account can be assigned to individuals at key Suppliers to enable self-scoring of Contract KPIs. These users can be included in the Workflow Rules. Contractor Users see a simplified view of the Contract Page for entering scores:



ATAMIS

Supplier Risk Management

Supplier Risk Segmentation can be implemented for Atamis SRM clients. Owing to the custom nature of supplier risk criteria, this feature requires customisation. A sample configuration is provided below:



▼ Supplier and Risk Management

Owner	John Kemp [Change]
Supplier Manager	John Kemp
Risk and Segmentation Date	04/01/2016
Generate New Periodic Activity Now	

▼ Section A: Initial Checks

A1 Passed Sanction Check?	Yes
A2 Passed Anti-Bribery & Corruption?	Yes
A3 D&B Risk Rating	C2
A4 Current Ratio >= 1:1	No

▼ Section B: Pre-Segmentation Filter

B1 Anticipated Annual Spend	600,000
B2 Developing/Supplying Software/IPR	Yes
B3 Access to Sites, Systems & Data	Sites Only (Unescorted)

▼ Section C: Supplier Segmentation (additional factors)

C1 Likelihood of Failing Obligations	Unlikely
C2 Impact of Failure	Severe
C3 Cost of Switching Suppliers	£100k to £250k
C4 How Long to Switch Supplier	6 to 9 months

▼ Dispensation

Dispensation/Waiver Agreed	No
Dispensated Activities	Department 1; Department 3; Department 4

▼ Supplier Segmentation Approval

Supplier/Procurement Manager	

Atamis SRM uses these custom risk criteria to determine supplier risk segmentation (e.g. High, Medium & Low) based on your required scoring algorithm. To implement this feature please request a Template for Supplier Risk Segmentation from support@atamis.co.uk. The formulae you complete in this Excel spreadsheet will be converted for use in Atamis SRM.

Periodic Activity

Depending on the risk segmentation resulting from the criteria above, Atamis SRM generates a series of recurring tasks. Each task is allocated to the supplier Owner who will receive system and email alerts at the designated time interval. For more information on how tasks and events can be used in Atamis, see the Tasks and Events section.

To implement this feature please request a Template for Supplier Periodic Activity from support@atamis.co.uk.

SRM Reports and Dashboards

For a full list of Supplier Reports, run the report “List of Reports” and add a filter for Folder Equals “Suppliers”.

Atamis offers two additional services for Local Authorities and similar organisations. Atamis Local Potential and Atamis Care Quality are detailed below. For more information, please contact **support@atamis.co.uk**.

Atamis LP - Local Potential

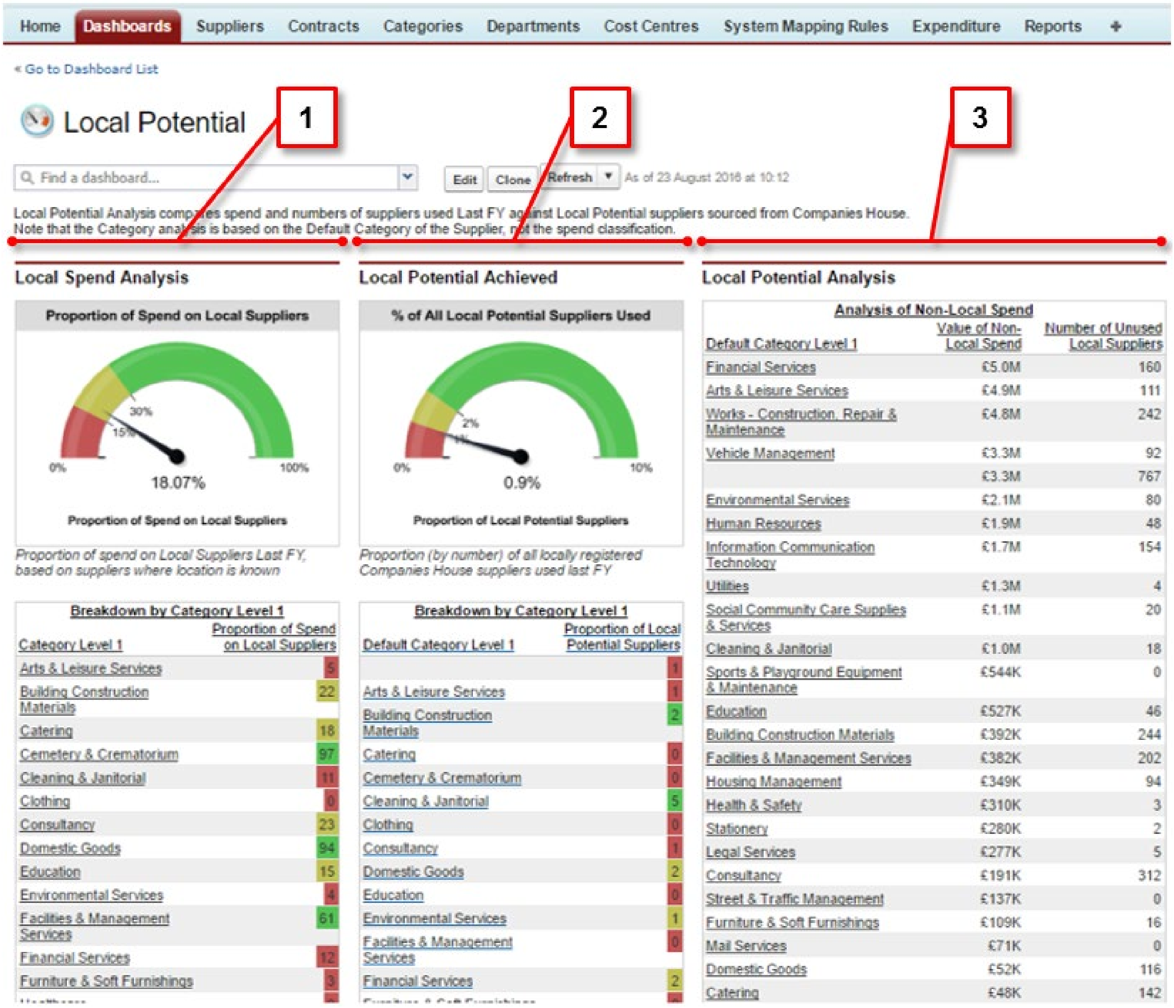
Introduction to Local Potential

Atamis Local Potential allows local authorities to analyse spend within their local area and identify opportunities to increase expenditure to local suppliers and to stimulate local economic growth.

Atamis imports all registered suppliers in the local area into the system and provides tools to identify types of non-local spend which local suppliers might be able to fulfil.

The Local Potential Dashboard

The Local Potential Dashboard is accessed via the Dashboards Tab, or the link for Local Potential in the Custom Reports & Dashboards section of the Homepage.



1 The Local Spend Analysis section provides a summary of the proportion of spend which is with Local Organisations. This is displayed as an overall value, and a breakdown for each Category.

2 The Local Potential Achieved section shows the percentage of Local Suppliers with which you have expenditure. Again, this is displayed as an overall value, and broken down by Category.

3 The Local Potential Analysis section compares the value of non-local spend, and provides the number of local suppliers within that Category area which might be able to provide the same goods or services.

The Local Potential Supplier Page

Supplier Detail

Field	Notes
Supplier Name	The name of Supplier, as it appears on Companies House
Address & Postcode	The registered address and postcode of the supplier.
Region, Location and Ward	These fields are set automatically by Atamis, based on the Address and Postcode information.
Company Reg Number	The Company Reg Number of the supplier
DUEDIL Link	Duedil is an external service provider, free to register with, that provides useful financial, shareholder and classification data. Credit Reports and Company Accounts can also be accessed but require fees. The link will only appear when the Company Reg Nbr is entered.
Description	The SIC Code and SIC Description which the supplier as the best summary of the goods or services that they provide
Default Category	The category in your chosen category structure which best matches the SIC given by the supplier.
Local Potential Supplier Used?	This indicates whether you are already using the supplier. Atamis matches between the supplier information you provide and the supplier information on Companies House in order to make the match

Supplier Trading Data

Field	Notes
Size	If you have requested UK Company Size/Sector Data Services from Atamis, the Company Size field is derived from the number of employees, annual turnover and total assets figures retrieved from Companies House and by applying an algorithm based on the EU definition of an SME. Atamis data services also identify the category of Individuals using matching algorithms against a database of common first names, last names and titles. This algorithm also takes into account common trading terms so, for example, “John

	Smith Solicitors" and "Peter Davies Building Contractors Ltd" would not be flagged as Individuals. A field called SME? is used in Atamis SA, which is derived from the Size and Sector fields and contains one of three values: SME Not SME Public Sector/Not Known Reports and dashboards that indicate the Proportion of spend with SMEs use the formula: (SME spend) / (SME spend + Not SME spend) * 100%
Sector	There are four possible values for this field: Private Sector, Public Sector, Third Sector and Not known. Atamis derives this data from either: Companies House data (the legal type of the business), a database of Charities, manual research of supplier websites or client updates via ProSpend Communities.

ATAMIS

Atamis CQ – Care Quality

Introduction to Care Quality

You will require the Care Quality upgrade in order to use the following fields and features.

The Atamis Care Quality Service enables a Local Authority to monitor the effectiveness and performance of its adult care providers. It incorporates up-to-date performance data from the Care Quality Commission directly into Atamis supplier profiles.

Atamis imports all Care Organisations within the Local Area, and automatically links them to your Suppliers based on the Name, Post Code, and Company Reg number. Clicking **Care Organisation** on any Supplier Detail page will display the Care Organisation page. There are two types of Care Organisation;

- Locations – the sites at which services are provided
- Providers – the owner or operator of the care home

The Care Quality Dashboard

The Care Quality Dashboard is accessed via the Dashboards Tab, or the Reports & Dashboards section of the Homepage. This dashboard is a tool that allows for a detailed comparison between any Care Organisations which are already being used, and those which are available in the local area.

1 The top-left area provides a summary of Care Organisations which are currently in use, with their CQC ratings, including ratings of inadequate.

2 The Trend Analysis section at the bottom-left provides high-level trend data, comparing the Care Organisations in use with the ones which are not.

3 The central area shows, in more detail, the latest ratings of the Care Organisations which you have made payments to in the last financial year. It provides a breakdown of the number of beds available in each.

4 The right column shows, in detail, the latest ratings of Care Organisation which are not in use. It also provides a breakdown of the number of unused beds available in each.

The Care Organisation Page

Supplier Detail Section

Field	Notes
Supplier Name	The name of the care organisation
Address & Postcode	The address and postcode of the organisation
Region, Location and Ward	These fields are set automatically by Atamis, based on the Address and Postcode information.
Report Under	The Provider which operates the Location in question
Creditor Ref	The CQC Reference of the organisation
Website	The website of the organisation
Care Quality Link	A link to the CQC profile for the organisation. Includes the results of the latest inspection

Rating Section

Field	Notes
Safe, Effective, Caring, Responsive, Well-Led	These scores are a measure of how Care Organisation is deemed to be performing in different areas. They are based on the latest inspection carried out by the CQC
Overall	The overall score awarded to the Care Organisation by the CQC at the last inspection.

Provider Detail Section

For Care Locations, the Provider Detail Section shows details on the Provider which operates the Care Location

Field	Notes
Provider Website	The website of the provider which operates a care Location
Provider Care Quality Link	A link to the CQC profile for the Provider.
Provider Overall	The overall score awarded to the Provider at the last inspection
Charity Link	A Link to the Charities Commission website appears when the Charity Reg Nbr is entered

Service Section

The fields in the Supplier Usage Last FY are calculated by the system using the supplier's previous financial year spend data. If you would like these fields to use a different 12 month period (for example the current FY so far) please contact Atamis Support and this will be adjusted for you.

Field	Notes
Brand	If the Care Organisation also trades under a different name, it will be included here
Type/Sector	The main area in which an Organisation provides services
Service Types	A summary of the types of service which the Organisation offers
Specialism/Services	Specialisms of the Care Organisation
Number of Beds	The total number of beds which the Care Organisation has