



*Improving procurement visibility and control*

# Guide to Using the Supplier Portal

Updated February 2023

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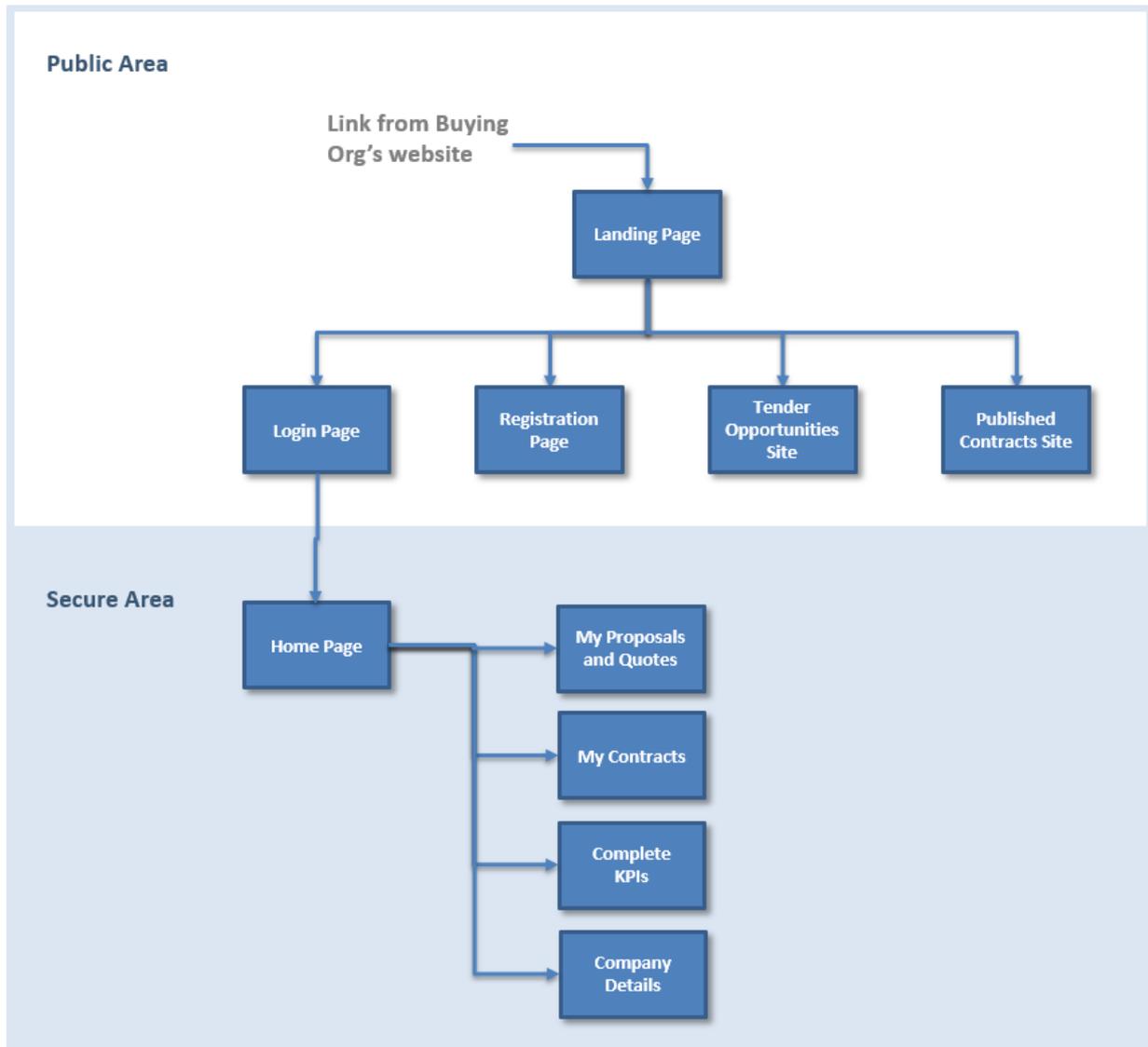
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## About the Supplier Portal

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

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

The following pages are normally made available within the Supplier Portal:



## Registering and logging in

### Register

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

### Log in

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

### Forgotten Password

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

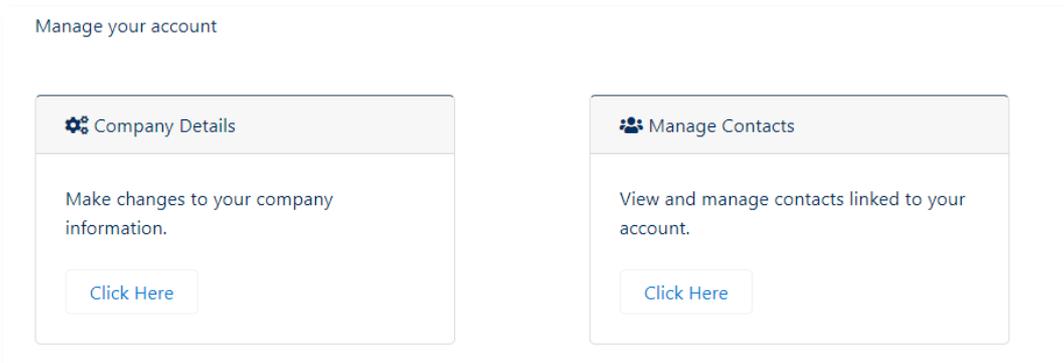
### Forgotten Username

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

### Managing Contacts Under your Supplier Account

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

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



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

The page will display two sections:

- Manage Contacts: displays a list of registered contacts on the Atamis Supplier Portal
- Projects: displays a list of projects that your organisation is currently engaging with of they have engaged in the past.

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

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

**Manage contacts**

**Contacts information**

Contact name	Active?
Maximus Decimus Meridius	<input checked="" type="checkbox"/>
John Smith	<input checked="" type="checkbox"/>

**Save changes**

“Projects” allows the management of primary contacts per project.

**Projects**

Project name	Project details	Primary contact
Printing Services	<a href="#">Go to details</a>	Ana Rolling
Hardware Maintenance	<a href="#">Go to details</a>	Ana Rolling

**Save changes**

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

**Projects**

Project name	Project details	Primary contact
Printing Services	<a href="#">Go to details</a>	Ana Rolling
Hardware Maintenance	<a href="#">Go to details</a>	<ul style="list-style-type: none"> <li>John Smith</li> <li>Procurement AJ Systems</li> <li>Donna Andrew</li> </ul>

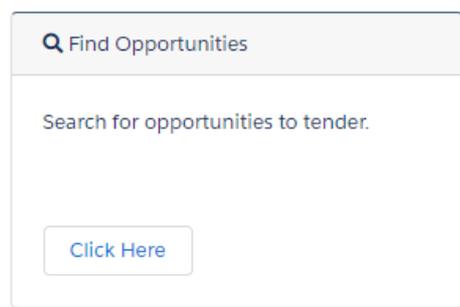
**Save changes**

## Finding tendering opportunities and getting alerts

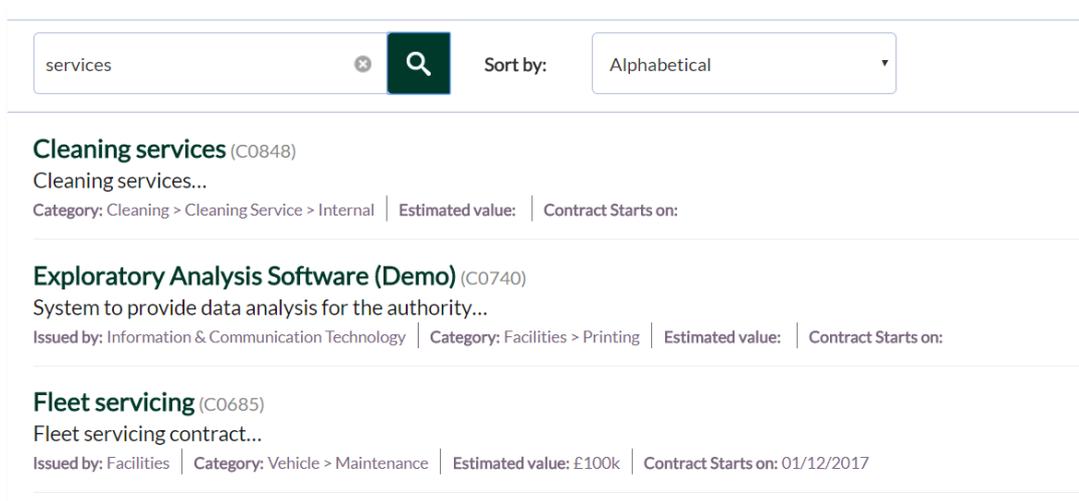
### Search for Opportunities

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

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



To search for tendering opportunities that have been published by the buying organisation, click **Find Opportunities**. (If you don't see this link it will be because the buying organisation is not publicising its tender opportunities through this portal.)



services  Sort by: Alphabetical

**Cleaning services (C0848)**  
Cleaning services...  
Category: Cleaning > Cleaning Service > Internal | Estimated value: | Contract Starts on:

**Exploratory Analysis Software (Demo) (C0740)**  
System to provide data analysis for the authority...  
Issued by: Information & Communication Technology | Category: Facilities > Printing | Estimated value: | Contract Starts on:

**Fleet servicing (C0685)**  
Fleet servicing contract...  
Issued by: Facilities | Category: Vehicle > Maintenance | Estimated value: £100k | Contract Starts on: 01/12/2017

Enter one or more search keywords and click **Search**. The Search looks in all fields and operates like a web search engine, so if you enter two words it will return records that contains either word. Click on the title of an opportunity to view further details.

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

## Download Opportunities

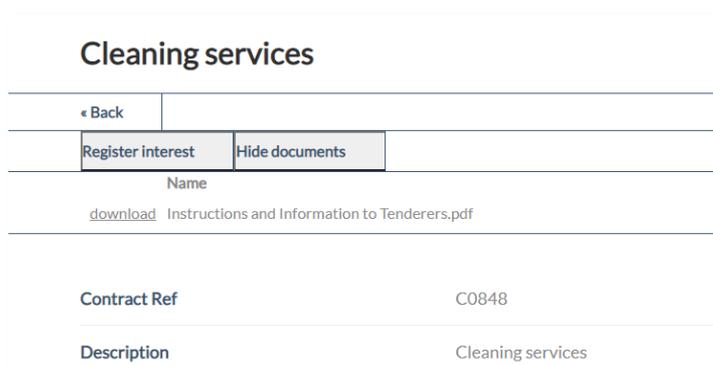
From the bottom of the **Find Opportunities** page, Click **Download CSV** to generate a file containing all the data displayed in the search results.

## Expressing interest in opportunities

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

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

From the **Find Opportunities** page, click on the title of an opportunity. If the tendering project is at the stage where it is open for suppliers to express interest, you will be able to click **Register Interest**.



**Cleaning services**

« Back

Register Interest Hide documents

Name  
[download](#) Instructions and Information to Tenderers.pdf

Contract Ref	C0848
Description	Cleaning services

The Register Interest button will not appear if the window for registration has not yet opened or if it has closed. It will also not appear if the procedure the buying organisation is using does not permit supplier self-registration.

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

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

## View your proposal and quotes

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



### My Proposals and Quotes

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

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

## Opportunity Page

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

**Home**

[My Proposals and Quotes](#) » C1439 - Health Services

### C1439 - Health Services

Health Services is a project funded by EU and is also contained within the School's Workforce, innovation and improvement theme. It is a collaborative research programme with Swansea and Cardiff Universities.

Deadline for clarification questions:  
 Closing Date/Time  : 30/11/2020 12:00 1  
 Current Date/Time  : 11/11/2020 17:01 [Refresh](#)

You have **Accepted** this opportunity and expressed your intention to respond. 2

3 [Documentation](#)
4 [Messages](#)
8 [Submit](#)
10 [Decline](#)

Requirements Sections	Required Questions Remaining	Completion Status	Status
<a href="#">Stage 1 - Qualification Questionnaire</a>	0	<div style="width: 100%; background-color: #0070c0; height: 10px;"></div> 100%	Submitted
<a href="#">Stage 1 - Technical Questions</a>	0	<div style="width: 100%; background-color: #0070c0; height: 10px;"></div> 100%	Submitted <span style="border: 1px solid red; padding: 2px;">9</span>
<a href="#">Stage 2 - Presentations</a>	1	<div style="width: 50%; background-color: #0070c0; height: 10px;"></div> 50% <span style="border: 1px solid red; padding: 2px;">7</span>	Not yet submitted
<a href="#">Stage 2 - Proposal</a>	1 <span style="border: 1px solid red; padding: 2px;">6</span>	<div style="width: 0%; background-color: #0070c0; height: 10px;"></div>	Not yet submitted

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

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

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

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

Home

[My Proposals and Quotes](#) » [C1439 - Health Services](#) » Documents

## Documents

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

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

- a) Shared documents will be displayed per folder and you are able to expand or collapse the list of documents by clicking on the arrow displayed next to the folder name
  - b) New documents that have not been downloaded by yourselves yet, will be marked as *New*
  - c) **Click** `Download` to download the document. Once downloaded, the system will mark the date/time and the name of the user that has downloaded the file
- 3 The communication between the organisation and yourselves must take place via messenger function. You can access all communications on [Messages](#) page. See [Message Centre](#) for more details.
  - 4 Each `Requirement Section` will contain several requirements. All `Requirement Sections` will be visible here and you will have to open each one of them to access the requirements. Go to [Responding to an opportunity](#) for more details.
  - 5 Every section will contain a number of required requirements and, as you enter your responses, the column will reflect the number of remaining required requirements due to complete.
  - 6 The completion status for each `Requirement Section` is calculated by the system from all the Required responses in the requirement section. If you have entered a Response but not marked it as `Complete`, the system treats that Response as 50% complete; if you check the `Complete` box, it treats is as 100% complete.

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

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

- 7 When you **click** `Submit` the system will check you have completed all the Required (including Pass/Fail) Requirements, then mark all Responses as `Complete` and display a submission confirmation message. Upon confirmation of submission, a submission notification will be sent to the email address registered and a copy of it is available in the Message Centre as well. Go to [Submitting a response](#) section for more details.
- 8 When you confirm the submission, the status of each Requirement Section will update accordingly. As the project progresses into other project stages, the submission status for each Requirement Section and Project Stage will update accordingly.
- 9 If you need to decline the invitation, you can do so by clicking on **Decline**. You will be given the option to write a message for the buying organisation.

### Decline Interest In Opportunity

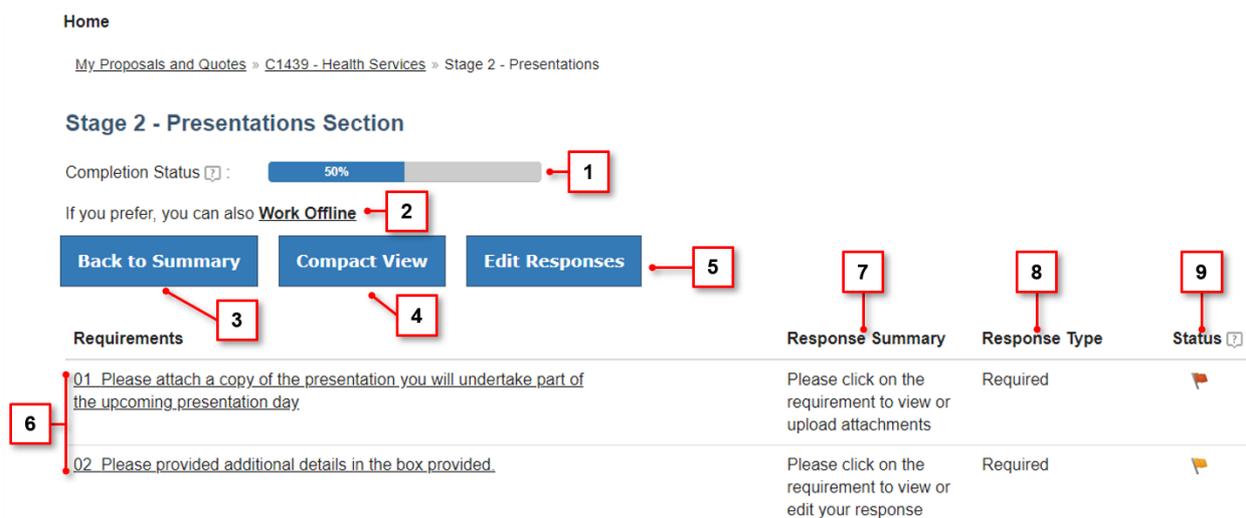
If you do not intend to continue participating in this procurement exercise, please provide a reason for declining below and click Confirm to inform the buying organisation of your decision.

Hello,

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

## Responding to an opportunity

In order to review and respond to the requirements **Click** on one of the Requirements Sections. The system will present you with a page containing the following components:



The screenshot shows the 'Stage 2 - Presentations Section' interface. At the top, there is a breadcrumb trail: 'Home > My Proposals and Quotes > C1439 - Health Services > Stage 2 - Presentations'. Below this, the section title 'Stage 2 - Presentations Section' is followed by a 'Completion Status' bar showing 50% completion, with a callout '1' pointing to the bar. Below the bar, there is a 'Work Offline' checkbox with a callout '2'. Three buttons are visible: 'Back to Summary' (callout '3'), 'Compact View' (callout '4'), and 'Edit Responses' (callout '5'). Below the buttons is a table with columns: 'Requirements', 'Response Summary', 'Response Type', and 'Status'. The first row has a callout '6' pointing to the requirement text: '01. Please attach a copy of the presentation you will undertake part of the upcoming presentation day.' The second row has a callout '7' pointing to the 'Response Summary' column, '8' pointing to the 'Response Type' column, and '9' pointing to the 'Status' column.

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

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

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

## Stage 2 - Presentations Section

If you'd prefer to work on your responses off-line, you can download the requirements for this section and the responses you've completed so far by clicking **Download**. Note that Rich Text Area and Attachment type responses are excluded from this download – you need to complete those directly in the system.

**Download**

To upload your changes, you must keep exactly the same file format, i.e. CSV file with the same column headings. If you are entering currency values, avoid using pound signs and commas, e.g. enter "1000.00" and not "£1,000.00". Remember to pay attention to any character limits on textual responses. If any responses fail the validation you'll be notified.

**Upload Responses**

**Back**

- Click Back** to Summary to return to the Opportunity Page.
- When the Requirement Section page is accessed, the default view of the requirement is set to **Expanded View**. The **Expanded View** presents the full body of the requirement and allows you to enter your responses while on the page.

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

Home

[My Proposals and Quotes](#) » [C1439 - Health Services](#) » Stage 1 - Qualification Questionnaire

### Stage 1 - Qualification Questionnaire Section

Completion Status : **14%**

If you prefer, you can also **Work Offline**

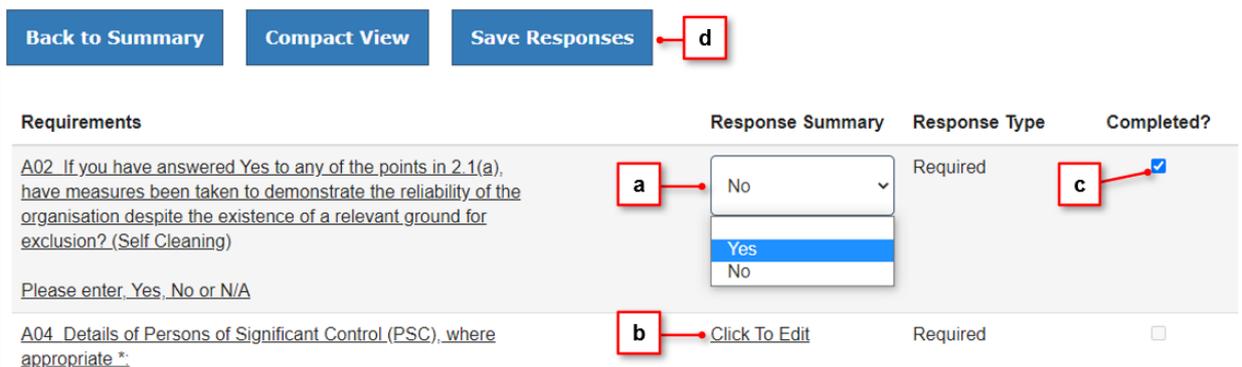
**Back to Summary**

**Expanded View**

Requirements	Heading	Response Type	Status 
<a href="#">A01 The Contracting Authorities require bidders (and their sub-contractors/partners) to have achieved c...</a>	Information Governance	Required	
<a href="#">A02 If you have answered Yes to any of the points in 2.1(a), have measures been taken to demonstrate the...</a>	Grounds for mandatory exclusion	Required	

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

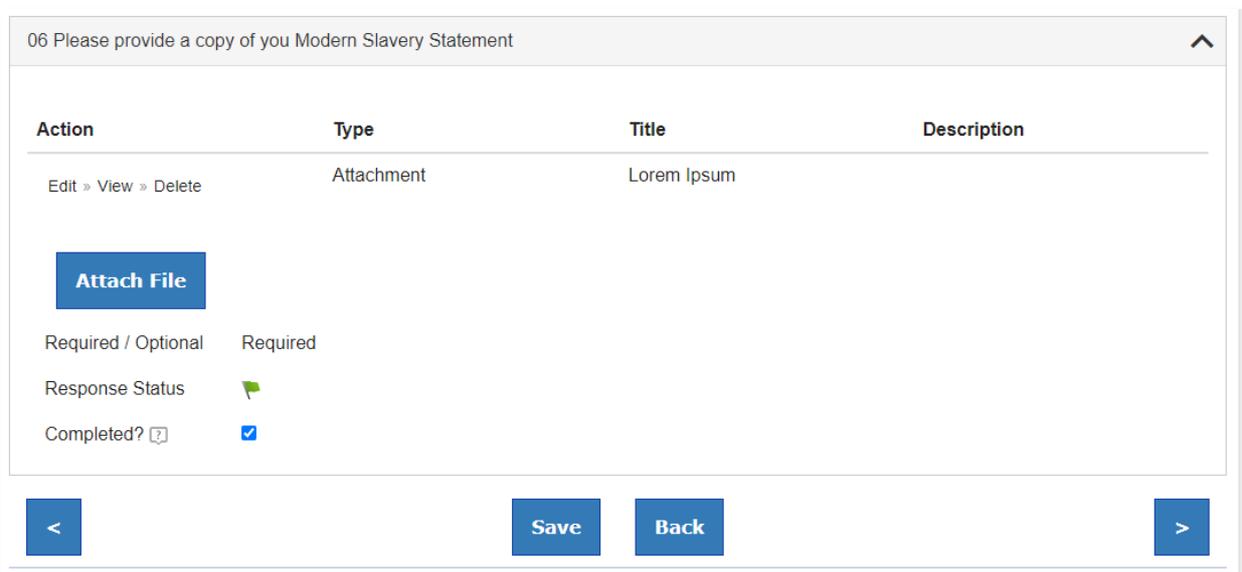
If you prefer, you can also [Work Offline](#)



The screenshot shows a navigation bar with three buttons: 'Back to Summary', 'Compact View', and 'Save Responses'. A red box labeled 'd' points to the 'Save Responses' button. Below this is a table with columns: 'Requirements', 'Response Summary', 'Response Type', and 'Completed?'. The first row shows a requirement with a dropdown menu for 'Response Summary' (options: No, Yes, No) and a checked checkbox for 'Completed?'. A red box labeled 'a' points to the dropdown, and a red box labeled 'c' points to the checkbox. The second row shows a requirement with a 'Click To Edit' link and an unchecked checkbox. A red box labeled 'b' points to the 'Click To Edit' link.

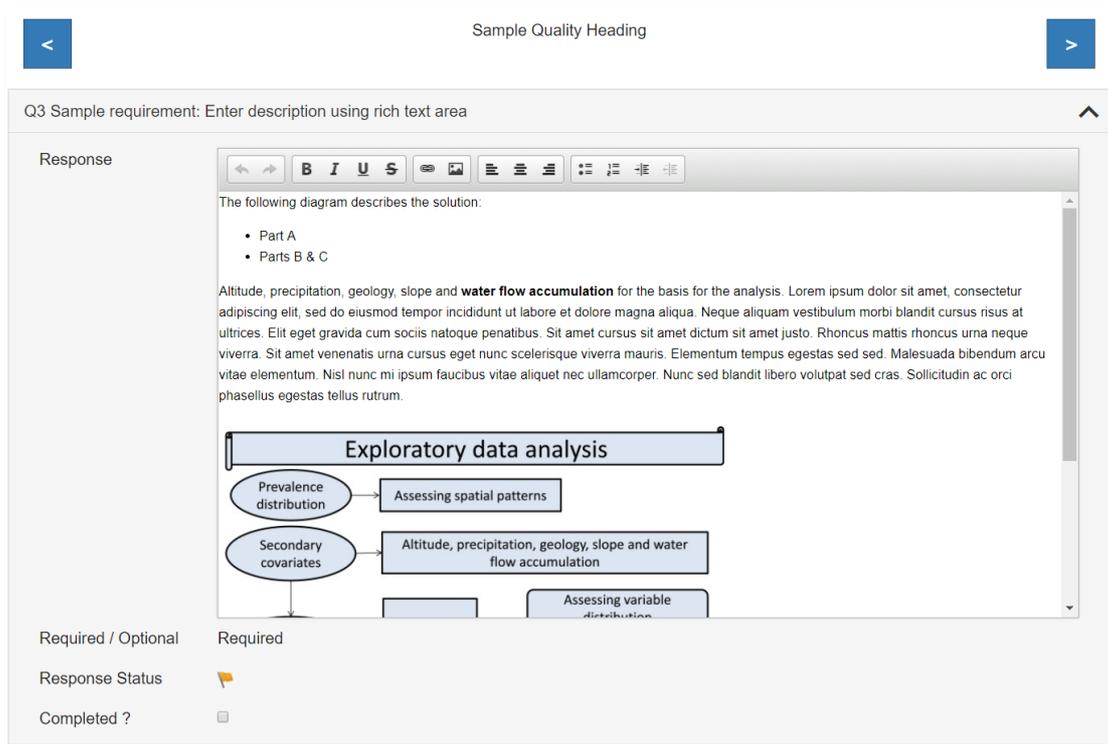
- For some type of responses, the system will allow you to edit while on the page, such as selecting one of the picklists
  - For other type of responses, you will need to click on the link in order to enter your response
  - Click on the checkbox to mark a response as completed
  - Click on Save Responses to save your entries while working on this page
- The requirements will be displayed in a list regardless what view you have chosen
  - Response Summary column will display your entered and saved responses. Please note that some responses will require you to click on the Response Summary link in order to enter your response. This action will direct you to a page where you can enter your responses.

Each Response page will have a different appearance depending on the *Response Field Type*. Two examples are shown below for Attachment...



The screenshot shows a response page for a requirement titled '06 Please provide a copy of you Modern Slavery Statement'. It features a table with columns: 'Action', 'Type', 'Title', and 'Description'. The table contains one row with 'Edit » View » Delete' in the Action column, 'Attachment' in the Type column, and 'Lorem Ipsum' in the Title column. Below the table is an 'Attach File' button. Underneath, there are labels for 'Required / Optional' (Required), 'Response Status' (a green flag icon), and 'Completed?' (checked checkbox). At the bottom, there are navigation buttons: a left arrow, 'Save', 'Back', and a right arrow.

and Rich Text Area:



**Note:** When completing responses of type Rich Text Area ensure that images are added to the response area by **clicking** on the Image Icon  rather than pasting the image in the response area.

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

**Note:** It is recommended NOT to use the Back button on your browser when using these pages.

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

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

- The flags displayed denote the Status of the response

-  Response entered and the Completed? Checkbox checked. You may submit your responses
-  Response entered, but Completed? Checkbox not checked. You may submit your responses
-  Response not entered. You must enter a response in order to submit.

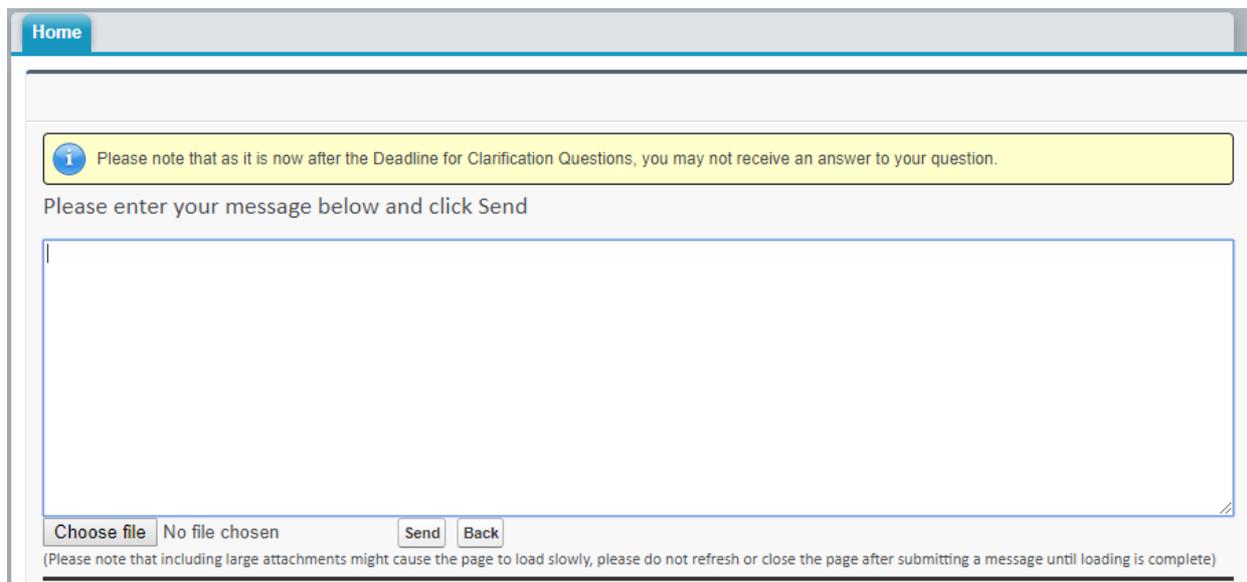
## Message Centre

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

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

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

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



The screenshot shows a web interface for sending a message. At the top left is a 'Home' button. Below it is a yellow warning box with an information icon and the text: 'Please note that as it is now after the Deadline for Clarification Questions, you may not receive an answer to your question.' Below the warning box is the instruction 'Please enter your message below and click Send'. There is a large text input area. At the bottom of the input area are buttons for 'Choose file', 'No file chosen', 'Send', and 'Back'. A small note at the very bottom reads: '(Please note that including large attachments might cause the page to load slowly, please do not refresh or close the page after submitting a message until loading is complete)'.

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

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

## Submitting a response (Accept, Submit or Decline)

### Accept

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

## C1439 - Health Services

Health Services is a project funded by EU and is also contained within the School's Workforce, innovation and improvement theme. It is a collaborative research programme with Swansea and Cardiff Universities.

Deadline for clarification questions:

Closing Date/Time  : 30/11/2020 12:00

Current Date/Time  : 11/11/2020 16:57 [Refresh](#)

[Documentation](#)

[Messages](#)

[Accept](#)

[Decline](#)

When you click on [Accept](#), the following message will be displayed which will request your confirmation before proceeding.

### Express Your Intention to Respond to this Opportunity

Please click [Confirm](#) to indicate to the buyer that you have received, understood and accepted the requirements for this opportunity and intend to respond.

[Confirm](#) [Cancel](#)

## Submit

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

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

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

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

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

The Status of each section will update as per below:

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

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

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

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

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

## Decline

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

### Decline Interest In Opportunity

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

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

**Confirm** **Cancel**