SUPPLIER GUIDE
FOR FINDING AND RESPONDING To
NEW OPPORTUNITIES with a
CONFIDENTIALTY AGREEMENT
WITHIN PROCONTRACT

This document will guide the user in locating and responding to new "open" opportunities that require a signed Confidentiality Agreement to be submitted prior to receiving access to the tender documents.

Please see alterative guidance for Dynamic Purchasing Systems, Tenders <u>without</u> a Confidentiality Agreement, and Further Competitions

This guidance relates to Gloucestershire County Council opportunities ONLY

Contents

Advertisements for opportunities issued by Gloucestershire County Council may be found in a variety of places, however, all documents, tender submissions, notification of awards and clarifications are all managed within the ProContract system.

When an opportunity is created, Gloucestershire County Council selects the Common Procurement Vocabulary (CPV) code/s which describes the procurement. If a supplier is registered with one or more of those codes they will receive an emailed notification of a new opportunity, the email will contain a link direct to the opportunity advertisement.

If you have accessed an opportunity from a link within a ProContract notification email skip to Section 1, step 5 in this guidance.

1. Finding an Opportunity

1. New opportunities can be found by going to https://www.supplyingthesouthwest.org.uk/ and clicking on "Search latest opportunities".
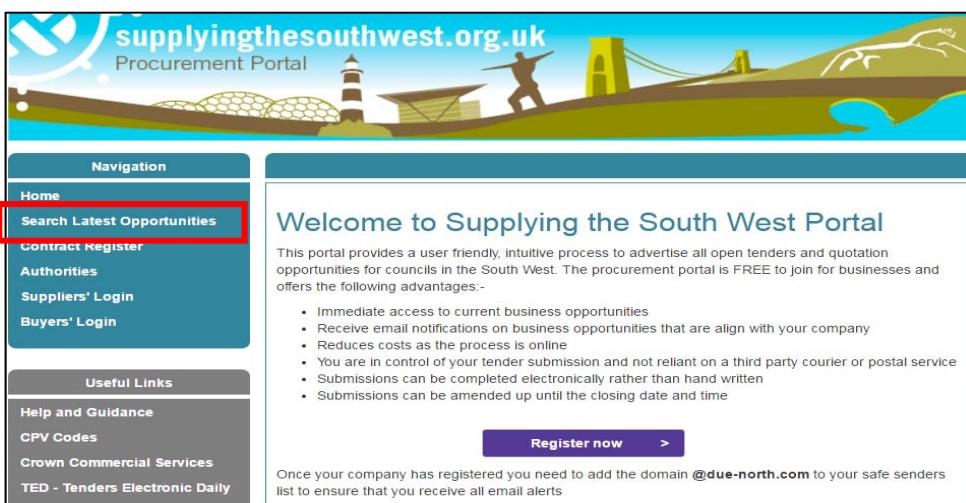
2. A list of opportunities published by Local Authorities in the South West using ProContract will be displayed.

3. Using the "Organisation" drop down menu (highlighted above), filter the results by "Gloucestershire County Council".

4. Click the "title" of the opportunity you would like to view.

The following screen will be displayed:

The above screen will provide a brief overview of the opportunity.

To view the documents and further information all suppliers must login to ProContract and register an interest in the opportunity.

5. ***If not logged in*** Click the "Login and Register interest in the Opportunity" as highlighted above. Login with your username and password.

If you do not currently have a username or password, click the "register free" link and follow guidance document: Initial Registration on the Portal and First Time System Login

6. ***Once logged in*** to ProContract the green button on the advertisement will change to "Register an Interest in this opportunity"

7. Click the "Register an interest in this opportunity" button

8. A pop up will appear with several options on accessing the opportunity under the **"What Happens Next?"** heading.   You can choose from one of the following, skip to the relevant part of the guidance depending on the selection:

> i. View from your "activities Centre" – *Go to step 2.1*
> ii. Click "Here" to view the documents – *Go to step 2.4*
> iii. Close the pop up – *Go to step 1.9*

9. The advertisement will remain displayed with the button now greyed out indicating this opportunity has been added to your "activity list".

Go to Section 2 "Viewing the Opportunity"

2. Viewing the Opportunity

Once the "register interest" button has been selected the opportunity is added into the "My Activity" area of ProContract. *Note: This area can only been seen when logged in.*

1. When logged in to ProContract, the below home page will be displayed

The Activities section will display all opportunities that either an expression of interest has been registered for, or you have been pre-selected for.

On the above screen, the Buyer, Title of the project, current event and event deadline is shown.

The ⭐ symbol illustrates a new opportunity which has not been viewed or worked on.

2.   To view an opportunity click on the **title** of the Activity to be worked on

3.   The screen below provides the events for the opportunity.

In most cases there will be 2 events displayed.
- The Expression of interest event, which is the original advertisement.
- The Opportunity which is where all the relevant documentation is held.

Note: For a Dynamic Purchasing System or if there is a requirement to complete a Confidentiality Agreement, there will be more than 2 events displayed, see specific guidance.

4. Click **Start** within the relevant event that is displaying Not Started

5. A summary screen will be displayed like below which is split up into different sections; Main details, Public attachments, and Messaging.

    See below for section explanations.

    There is also a **countdown timer** in the top right indicating the time left until the submission deadline for this opportunity.

Main details
This section shows the title, description and date and time the completed Quote or Tender submissions must be returned by.

Attachments
This section shows the attachments that have been published by Gloucestershire County Council. To download click on the title of the attachment, save the document to your own network or desktop before working on them. **Please note that you must abide by the data protection rules.**

Note: If no attachments have been added, an item breakdown may have been used. If this is not visible send a message via ProContract to verify with the team.

Terms and Conditions

These are the terms and conditions associated to the opportunity. If a "See Tender Pack" or "See Quotation Pack" documents is displayed, the terms and conditions will be within the main attachments.

Messages

During the process all questions should be raised using the portal and any messages sent to you can be viewed in the same place.

Any messages sent through this area will go to the Gloucestershire County Council contacts that are working on this opportunity. Open this area by clicking on **View messages**.

Messaging

You have 1 unread message(s).
View messages

For further information see guidance document – Messaging in ProContract

3. Submitting the Confidentiality Agreement

NOTE: Due to the nature of this part of the process you will be unable to re-submit your confidentiality agreement, however, if there are any issues the project team at Gloucestershire County Council will advise on how to re-submit the agreement if required.

To begin the response, from the summary screen, click Start my response

Cheshire - ITT   41

Main details

Title: Example ITT   Respond by: 03/14/2015 21:30:00
Description:
Example ITT

Public attachments

Public attachments can be viewed by all procurers and suppliers involved in this rfx

ITT Attachment.docx   12 KB
Specification & Requirements Document.docx   12 KB

Terms & conditions

Time remaining

2	5	21	30
Days	Hours	Minutes	Seconds

Messaging

You have 1 unread message(s).
View messages

Response controls

Start my response
Register intent to respond
No longer wish to respond

4. The Response Wizard for Confidentiality Agreement

The wizard will open, which will go through each stage of the Confidentiality Agreement response to make sure it is completed successfully.

1. Stage 1 will always contain a welcome message which should be read carefully.

2. Click [Continue] to move onto the next page or click Cancel to leave the wizard.

5. Additional Information (optional)

Additional information can be entered, however it is not mandatory.

Additional information includes a reference or additional comments relevant to the submission for the individual opportunity.

1. When complete click [Continue] to move onto the next page.

6. Uploading Attachments (Mandatory)

This stage allows you to upload the relevant attachments. **The signed Confidentiality Agreement must be uploaded here.**

1. To add an attachment click [Add attachment]

2. Click [+ Add files...]

3. Select the required file via the browser option and click **Open**

You can now browse your computer for the attachment using the file uploader.

4. Once the attachment has been added click [⊙ Start upload]

When uploaded, you can view an attachment by clicking its name.

5. To remove the attachment click ⊗

6. When complete click [Finish]

7. Confirming Submission of the Confidentiality Agreement Response.

The response will remain in Draft until the submission has been confirmed.

If the response is not submitted fully Gloucestershire County Council will not be able to view it.

1. To submit the response click [Submit response]

2. Confirm the submission by clicking Submit response for a second time on the pop up screen

Note: If the Submit response button is greyed out, the Submission checklist will identify what is missing (anything with a red box will need completing)

3. When a response has been fully submitted the opportunity screen will update and the highlighted areas below will indicate that the response has been sent to GCC

8. Accessing the Opportunity to start the Tender Response

Once the Project team at Gloucestershire County Council have checked and verified your Confidentiality Agreement the Tender Documents will be released to you.

1. Access the opportunity from the "My activities" area.

2. The screen provides the events for this opportunity.
   There will now be 3 Events displayed
   - The Expression of interest event, which is the original advertisement.
   - The Confidentiality Agreement event
   - **The Tender Event – *NEW***

   Note: If the new tender event is not showing, the GCC team may not have granted access to you yet. If you have any concerns with the length of time, use the messaging area on the ProContract Project to contact the team. Please be aware the team is only available during normal working hours.

3. Click **Start** within the relevant stage that is currently displaying Not Started

4. The summary screen will be displayed, which is broken up into different sections; Main details, Public attachments, Terms & Conditions, and Messaging.

   These sections are the same as the previous event for the Confidentiality Agreement However, instead of the Confidentiality agreement, you should now see all the Tender Documentation, and there will also be a section for the Terms & Conditions of the contract. Explanations of the sections can be found below.

The **countdown timer** in the top right now indicates the time left until the Tender submission deadline.

5. Download the Tender Documents, and complete offline.

Main details

This section shows the title, description and date and time the completed Quote or Tender submissions must be returned by.

Attachments

This section shows the attachments that have been published by Gloucestershire County Council. To download click on the title of the attachment, save the document to your own network or desktop before working on them. **Please note that you must abide by the data protection rules.**

Note: If no attachments have been added, an item breakdown may have been used. If this is not visible send a message via ProContract to verify with the team.

Terms and Conditions

These are the terms and conditions associated to the opportunity. If a "See Tender Pack" or "See Quotation Pack" documents is displayed, the terms and conditions will be within the main attachments.

Messages

During the process all questions should be raised using the portal and any messages sent to you can be viewed in the same place.

Any messages sent through this area will go to the Gloucestershire County Council contacts that are working on this opportunity. Open this area by clicking on **View messages.**

For further information see guidance document – Messaging in ProContract

9. Submitting a Tender Response

Note: Responses can be completed in stages, and can be re-submitted up until the closing time. Gloucestershire County Council will only see the final response submitted once the tender closes.

1. To begin the response, from the summary screen, click **Start my response**

10. The Response Wizard

The response wizard will open, which will go through each stage of the response submission to make sure it is completed successfully. Note, you can skip stages at this point and come back at a later stage to complete. However, all mandatory areas will need to be completed before a submission can be made.

1. Stage 1 will always contain a welcome message which should be read carefully.

2. At the bottom of the page click **Continue** to move onto the next page and click *Cancel* to leave the wizard.

11. Additional Information *(optional)*

Additional information can be entered, however it is not mandatory.

Additional information includes a reference or additional comments relevant to the submission for the individual opportunity.

1. Click **Continue** to move onto the next page.

12. Uploading Attachments (mandatory in most cases)

The next stage allows you to upload your relevant attachments.

Note: If an attachment has been sent to be mandatory, the system will not let you complete a response submission until an attachment has been added. However, you can come back to this stage to add an attachment before submitting the response.

1. To add an attachment cli **Add attachment**
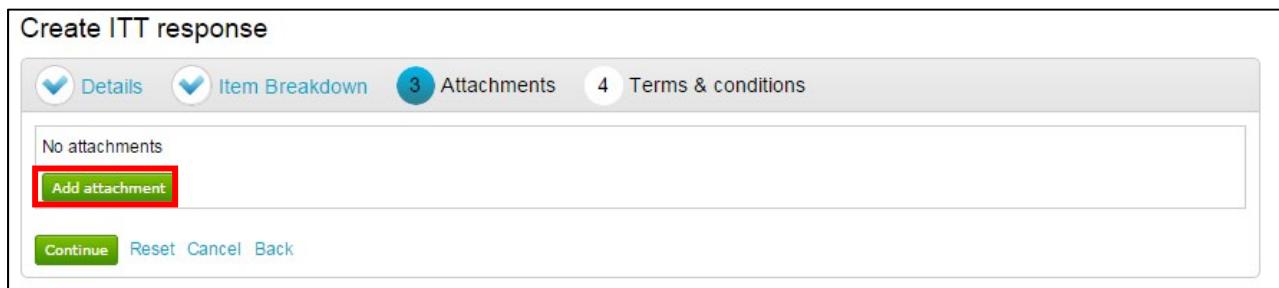
Create ITT response

✔ Details   ✔ Item Breakdown   ③ Attachments   ④ Terms & conditions

No attachments

Add attachment

Continue   Reset Cancel Back

2. Click **+ Add files...**

Project attachments   ✖

Show weblinks

File upload rules:
  ○ Maximum file size: 1024MB
  ○ Valid file types: txt, rtf, mpp, vsd, dwg, rar, msg, ics, html, gif, jpg, png, jpeg, tiff, tif, zip, pdf, doc, xls, ppt, docx, xlsx, pptx, mp3, mov, m4a, swf, wmv, mpg, mpeg, avi, wav, odt, odp, ods, numbers, pages

+ Add files...   ⊕ Start upload   ⊘ Cancel upload

3. Select the required file via the browser option and click **Open**

You can now browse your computer for the attachments using the file uploader. You can add as many attachments as required.

4. Once all the attachments have been added click ⊕ **Start upload**
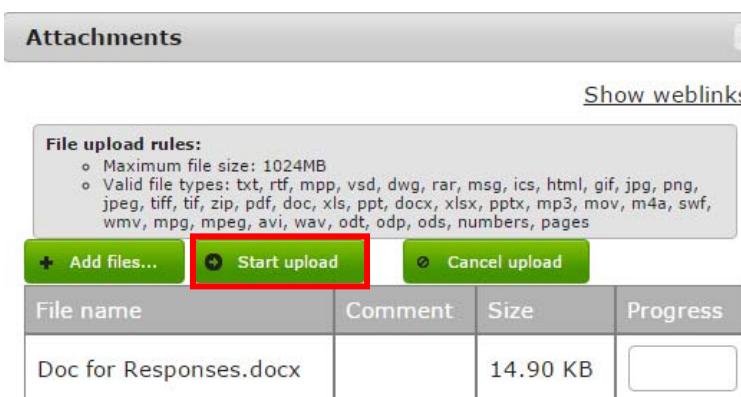
Attachments   ✖

Show weblinks

File upload rules:
  ○ Maximum file size: 1024MB
  ○ Valid file types: txt, rtf, mpp, vsd, dwg, rar, msg, ics, html, gif, jpg, png, jpeg, tiff, tif, zip, pdf, doc, xls, ppt, docx, xlsx, pptx, mp3, mov, m4a, swf, wmv, mpg, mpeg, avi, wav, odt, odp, ods, numbers, pages

+ Add files...   ⊕ Start upload   ⊘ Cancel upload

File name	Comment	Size	Progress
Doc for Responses.docx		14.90 KB	

When uploaded, you can view an attachment by clicking its name.

5. To remove the attachment click ❌

6. When complete click **Continue** to move onto the next page.

13. <u>Terms & Conditions (T&C's)</u> *(mandatory)*

All tenders will have terms and conditions. If the terms and conditions have been included within the Tender, then the Terms and Conditions file will be named "See Tender pack for T&C's", however it is still a requirement to indicate if the Terms and Conditions laid out against the tender are accepted or declined.

1. Click on the link to view the T&C's document

2. Irrespective of where the Terms and Conditions are listed, the Supplier must still either "Accept" or "Decline" the terms and conditions by clicking the relevant radio button.

   IF DECLINE is selected then a reason must also be included.

3. When completed click the **Finish** button to proceed to the next screen.

   ➢ *Reset* will begin the wizard again and remove all info,
   ➢ *Cancel* will leave the wizard completely (without saving)
   ➢ *Back* will return to the previous stage.

14. <u>Submitting the Tender Response</u>

The response will remain in Draft until all mandatory sections are complete and the submission has been confirmed. If the response is not confirmed Gloucestershire County Council will not be able to view it.

   ➢ If the Submit response button is greyed out, this means mandatory information is missing. Click **Edit** against each section to add the required information. See section 6 or 7 of this guidance for information on how to complete

1. To submit the response click **Submit response**

2. Confirm the submission by clicking Submit response for a second time on the pop up screen

3. When a response has been fully submitted the opportunity screen will update and the highlighted areas below will indicate that the response has been sent to GCC

NOTE: Responses can be edited and resubmitted up until the tender/quotation closing time. See section 9 of this guidance for details on how to do this.

Respond by time ended

When the respond by time has reached its end the countdown timer will change to red and be marked "completed" this indicates that submissions can no longer be made.

Gloucestershire County Council - Quick quote	5128126

Time remaining
Completed

Main details

Title: QQ Test 2 - 03.09.15
Description:

Respond by: 03 September 2015 11:30:00

15. Editing Tender Response and Re-Submission

After the Tender or Quotation response has been submitted it can be edited and updated as many times as required before the submission time and date has passed.

Gloucestershire County Council are only able to view the latest version of information and documentation submitted before the tender/quotation has closed.

1. To edit a response from the tender summary screen, click I would like to edit my response under the response controls area.
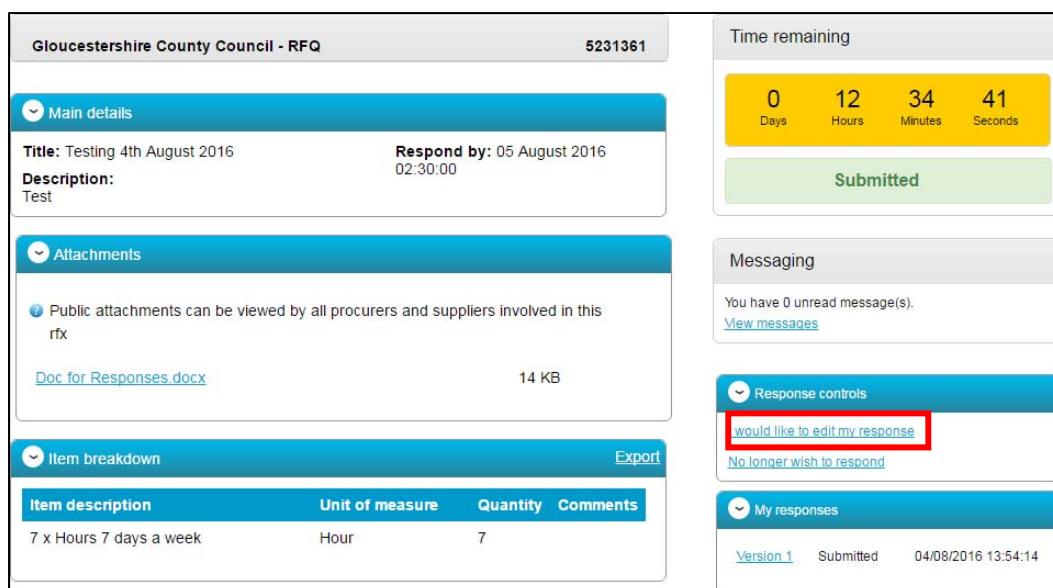
Gloucestershire County Council - RFQ   5231361

Main details

Title: Testing 4th August 2016
Description: Test

Respond by: 05 August 2016 02:30:00

Time remaining

0 Days	12 Hours	34 Minutes	41 Seconds

Submitted

Attachments

Public attachments can be viewed by all procurers and suppliers involved in this rfx

Doc for Responses.docx   14 KB

Messaging

You have 0 unread message(s).
View messages

Response controls

would like to edit my response
No longer wish to respond

Item breakdown   Export

Item description	Unit of measure	Quantity	Comments
7 x Hours 7 days a week	Hour	7	

My responses

Version 1	Submitted	04/08/2016 13:54:14

2. When this is clicked it will create a draft version 2.

My response	26	Draft

3. Each area can then be amended, either by editing the relevant section or clicking **Open response wizard**, and then submitted using the stages 11, 12 and 13 in this guidance.

4. **For GCC to receive the updated response, you must click the** **again.**

Note: If your edited version is submitted after the deadline has passed, GCC will only be able to accept the previous version which was submitted on time.