



Cardiff
Metropolitan
University

Prifysgol
Metropolitan
Caerdydd

Step by Step Supplier Guide

to

Cardiff Metropolitan University e-Tendering System

Introduction

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

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

Registering on the e-Tendering system

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

From the homepage click on **Register**

The screenshot shows the In-Tend procurement solutions website. On the left, there is a navigation menu with buttons for 'Login', 'Forgotten Details', 'Register', and 'in-community'. A black arrow points from the 'Register' button in this menu to the 'Register' button in the main content area. The main content area has a green header with the In-Tend logo and 'procurement solutions' text. Below the header is a navigation bar with links for Home, Supplier Guidance, Messages, Tenders, Contracts, Register, and Help. The main content area contains a 'Welcome to the In-Tend BETA V3 electronic tendering process' section with a list of features, a 'How do I get started?' section, and a link to procurement policies. At the bottom, there is a footer with user information, copyright notice, and version/date/server details.

Registration process

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

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

Registration

Company Details | Business Classifications | Company Categories | Policies | Disclaimer

In order to gain full access to this website you must register your company / organisation details
 If you believe that your company / organisation has already registered on this site but you are a new user who requires access, please contact one of the existing registered contacts and ask them to add you as a new contact
 PLEASE NOTE: Yellow fields are MANDATORY

Company Details

Company Reg No : I do not have a Company Reg Number

Company Name : Address Line 1 :

Address Line 2 : Town/City :

County/State : Postcode/Zip :

Country : Structure :

Contact Details

Telephone : Fax :

Web Site : Construction Line No :

Primary User Details

Contact First Name : Contact Last Name :

Telephone : e-Mail :

Confirm e-Mail : Password :

Confirm Password :

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

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Additional User Details

Contact First Name : Contact Last Name :

Telephone : e-Mail :

Confirm e-Mail : Password :

Confirm Password :

[Register My Company](#)

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

Company Details | **Business Classifications** | Company Categories

Classifications

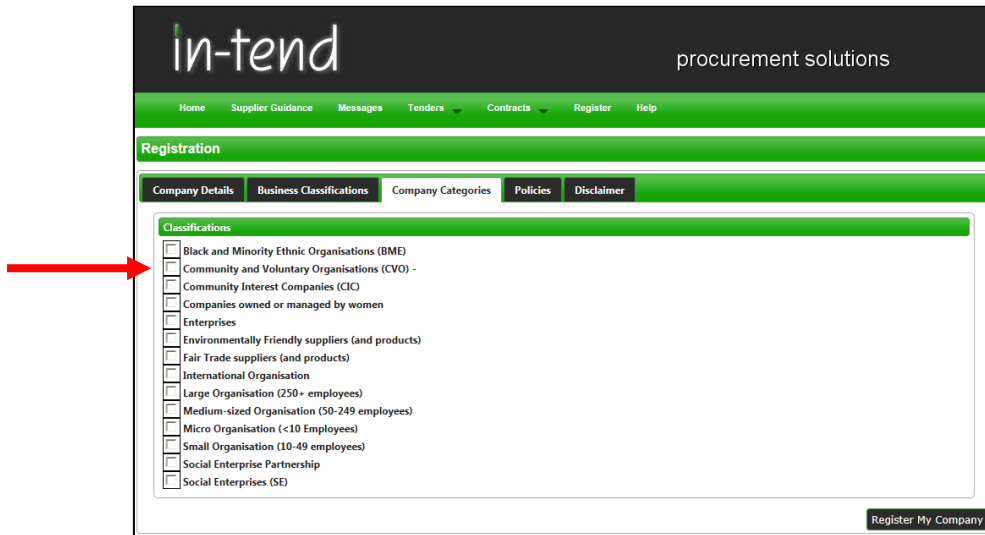
Search : [Search](#) [Clear](#)

Category	Title	
	Unspecified	+
E	Agricultural/Fisheries/Forestry/Horticultural/Oceanographic Supplies & Services	+
A	Audio-Visual & Multimedia	+
C	Catering Supplies & Services	+
K	Computer Supplies & Services	+
W	Estates & Buildings	+
F	Furniture, Furnishings & Textiles	+

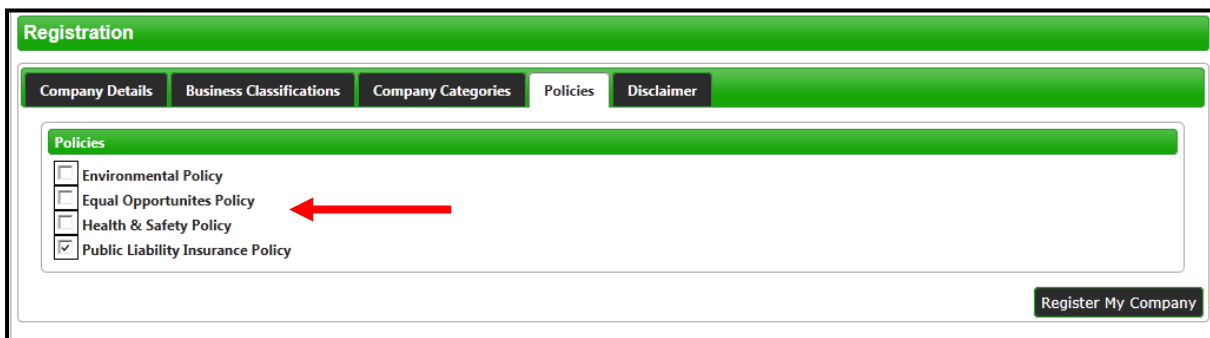
Category **Title**

[Register My Company](#)

In the **Company Categories** tab you are able to tick any of the categories that apply to your company.



In the **Policies** tab you are able to tick any of the listed polices that your company currently holds



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

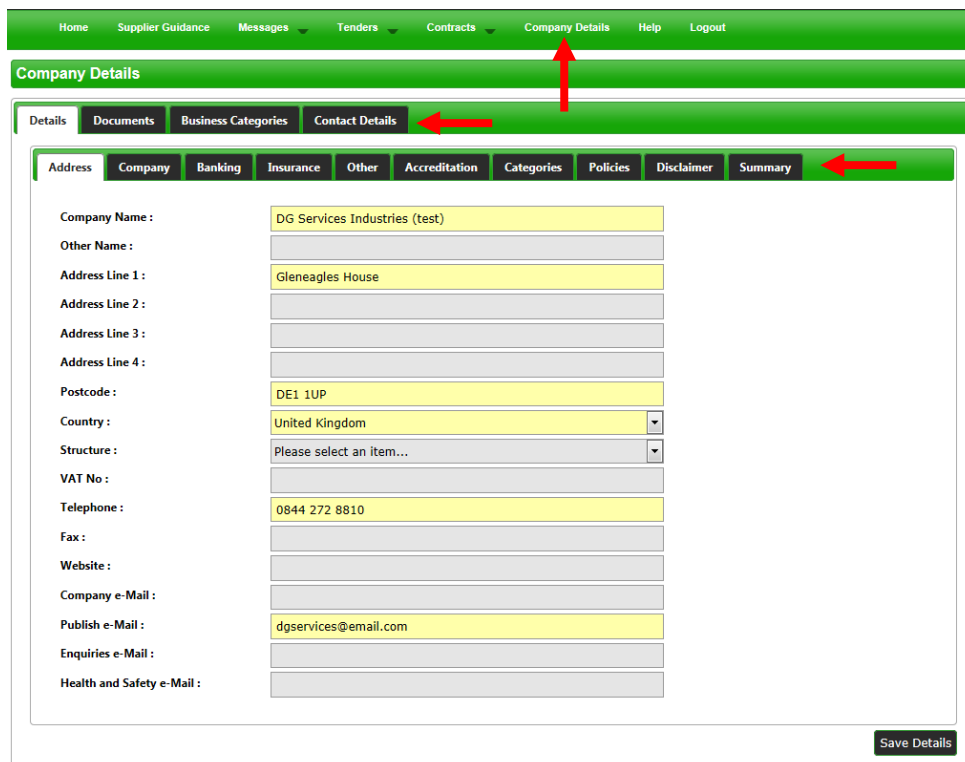
You should not register your company more than once, unless they are under a separate company registration number. If your company has several locations, register the company against the head office and add contact details for individuals at the different locations. You can add one additional user at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

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



Managing your Company Details

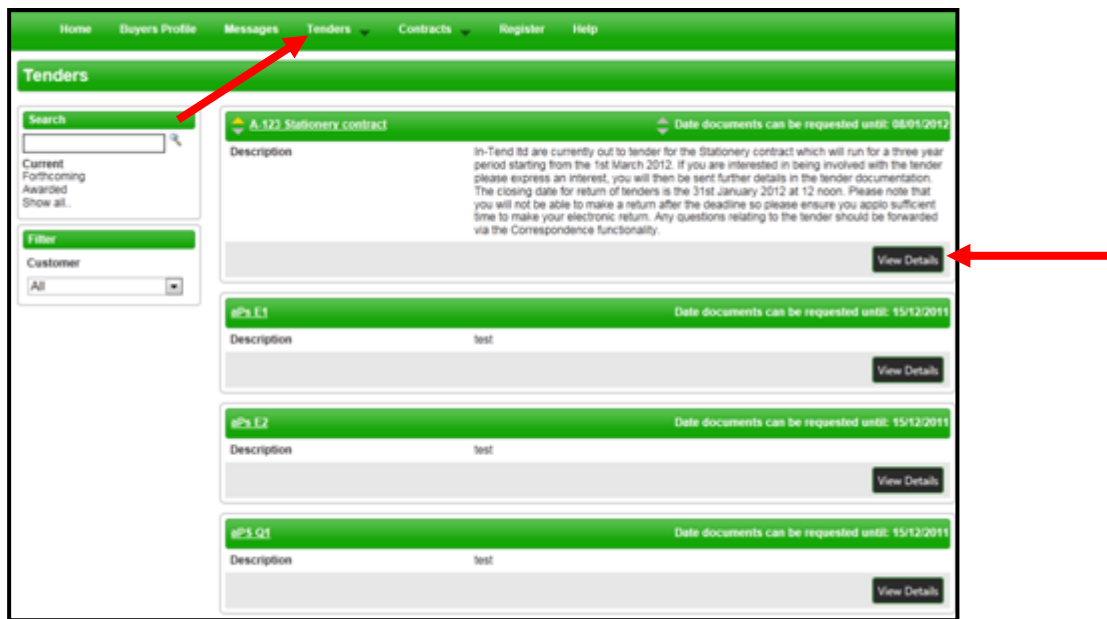
If you need to update your company information you can do this from the **Company Details** section on the top menu bar. From here you can edit/add information regarding the company, contact details, company documents and business classifications.



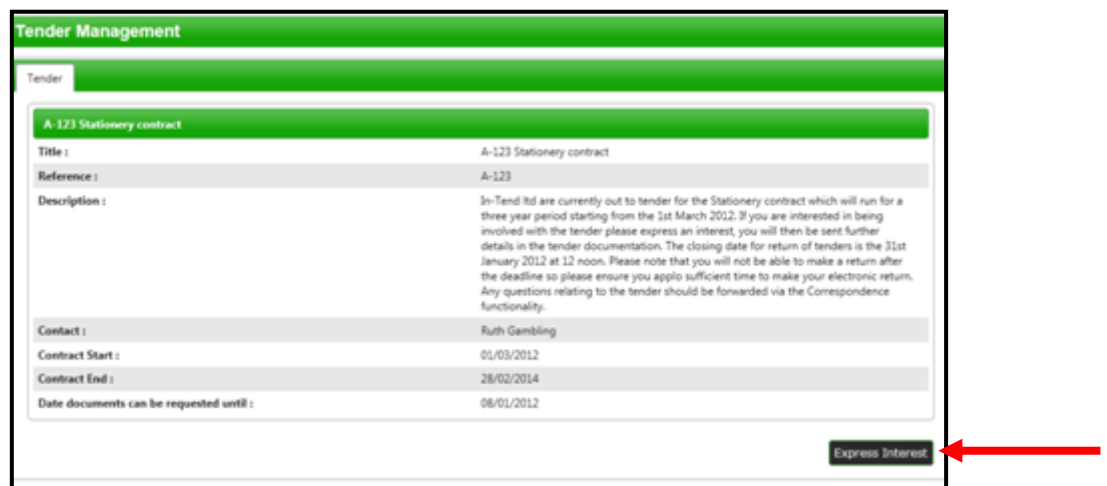
Please note that it is important that you do keep your details up to date, particularly your contact email addresses as you may miss out on tender opportunities which may be of interest.

Tender Opportunities

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

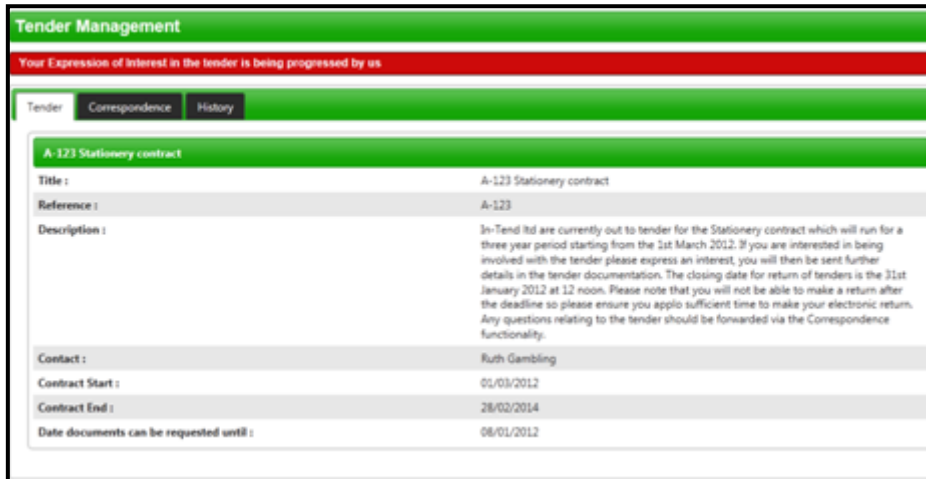


From the Tender Management screen you are able to **Express Interest** in the tender.



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

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



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

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

e-Mail Address :

Password :

Login

Forgotten Details

Register

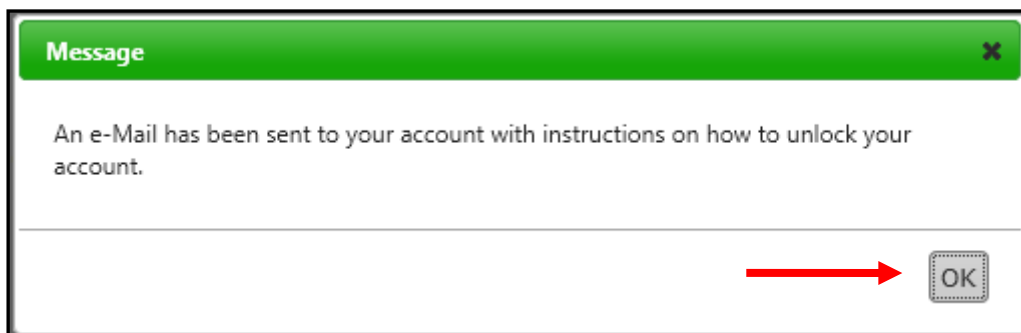
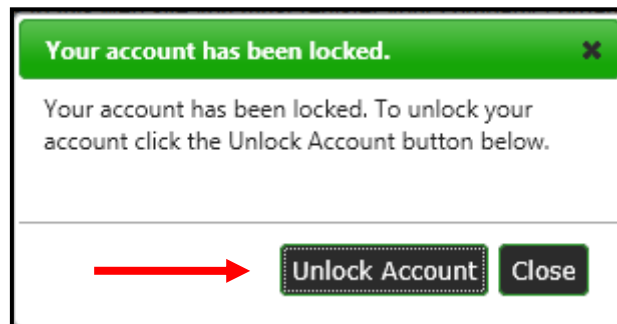
NOTE: Please be aware that failure to provide correct login information three times will result in your account being locked

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

Locked Account

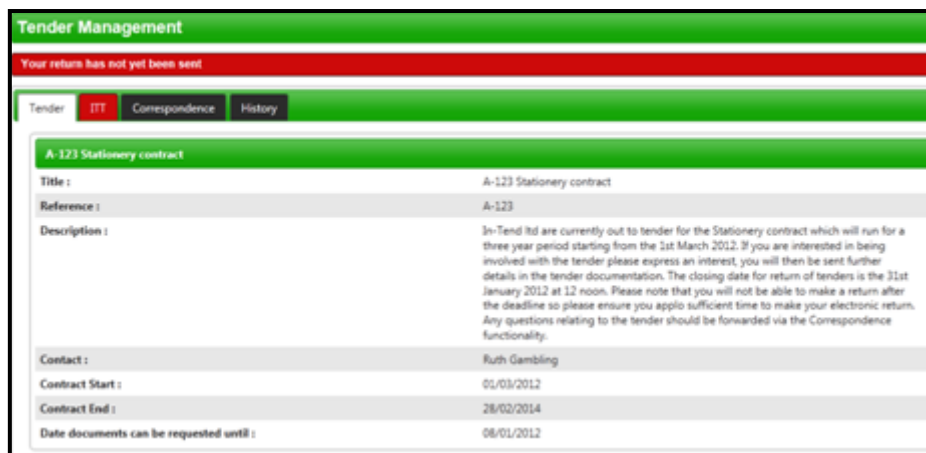
If you enter your password incorrect 3 times then your account will become locked.

This can be unlocked by clicking the “Unlock Account” button.



An email will be automatically sent to your registered email address containing a link which can be used to unlock your account.

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



Submit Tender Return

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

In this section you will see the follow headings:

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

The screenshot displays the tender portal interface with several sections:

- How To Attach & Submit Documents:** A green header box containing instructions on how to attach documents and submit returns. It includes a note about large files and a 'Submit Return' button at the bottom.
- Server Time / Due Date / Time Remaining:** A status bar showing the current server time (08/12/2011 11:50:39), the due date (31/01/2012 12:00:00), and the time remaining (8 Weeks, 22 Hours, 20 Seconds).
- Tender Details:** A table with the following information:

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

Tender Documents Received	Description	Options
In-Tend sample ITT.doc		View Download
Tech spec.doc		View Download
In-Tend sample TandCs.doc		View Download
- My Tender Return:** A table listing required documents with 'Upload Document' buttons. A red arrow points to the 'Upload Document' button for 'Health And Safety'.

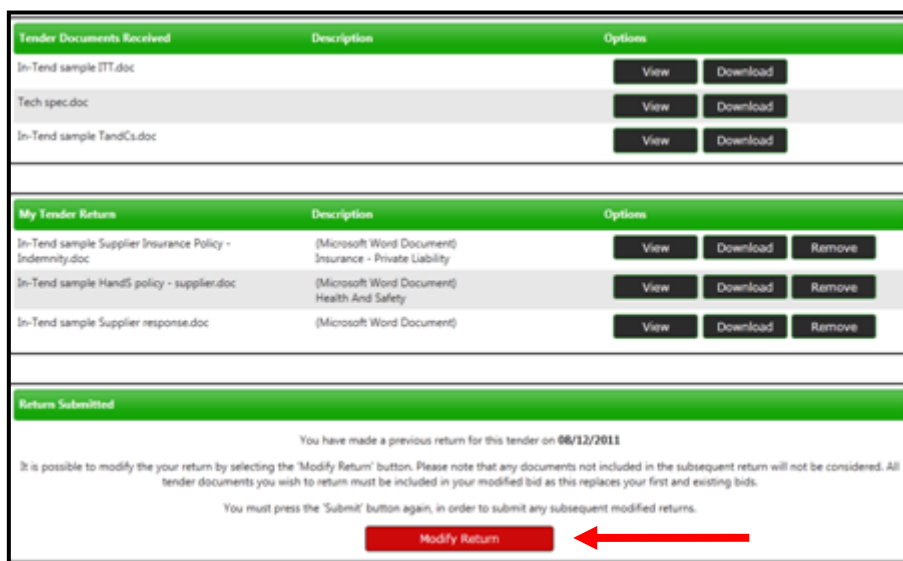
My Tender Return	Description	Options
Insurance - Private Liability	Upload copy of Insurance certificate	Upload Document
Health And Safety	Upload copy of Health and Safety Policy	Upload Document
- Attach Documents:** A section with a note about file sizes and an 'Attach Documents' button. A red arrow points to the button.
- Submit My Return:** A section with a note about submitting the return and a 'Submit Return' button. A red arrow points to the button.

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



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

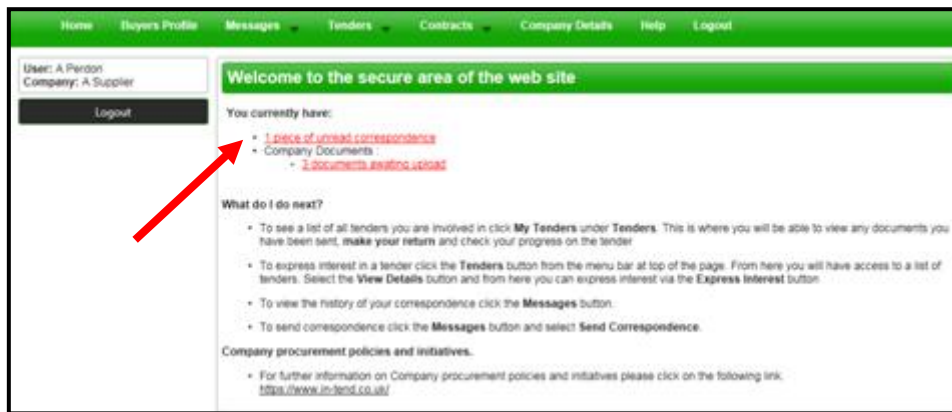
Please note you should ensure that ALL the documents which you wish to be evaluated as part of your tender return are included in the My Tender Return section before you click on Modify Return as you are overriding the first return!



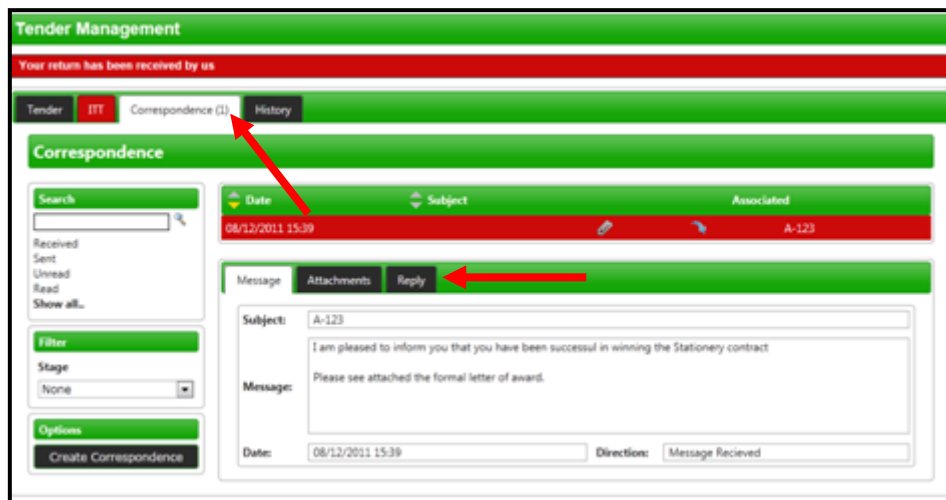
Correspondence

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

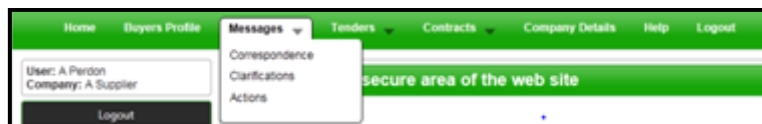
If you receive Correspondence you will firstly receive an email alert informing you of this. You will need to login to the secure area of the system to view it. When you first login you will see on the homepage in red a prompt to say that there are unread correspondence. If you click on the link it will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



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

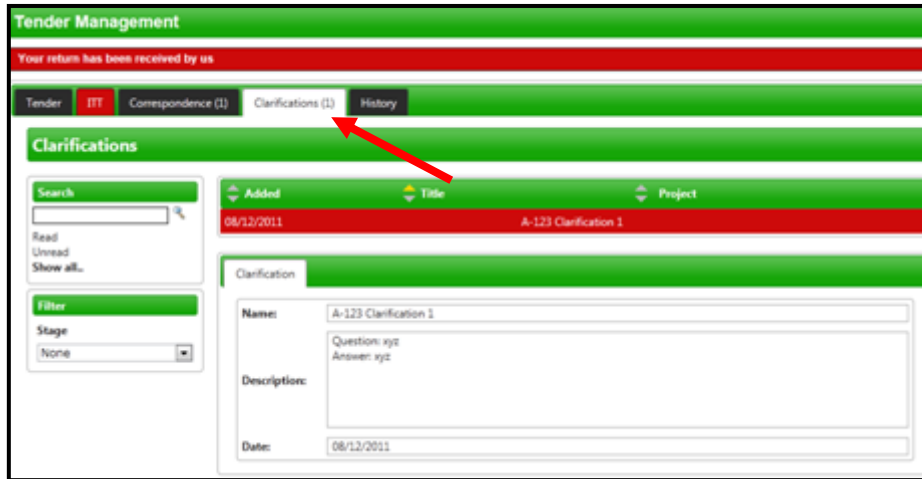


You can also view Correspondence through the **Messages** tab at the top of the screen



Clarifications

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



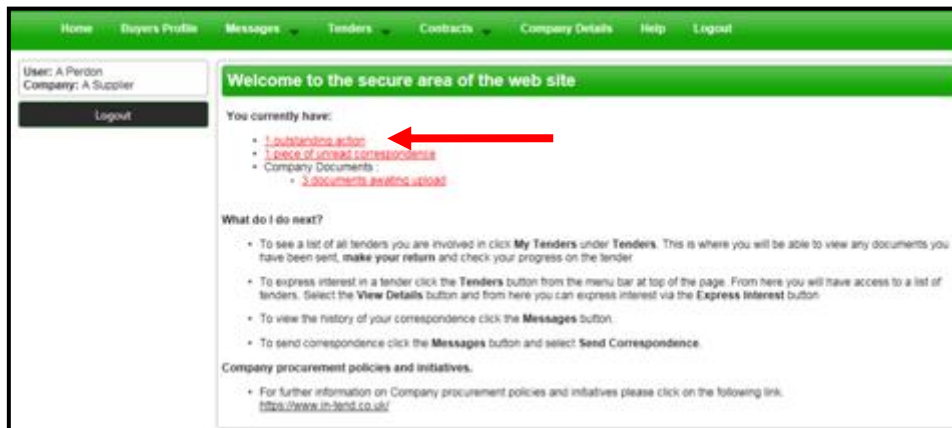
NB. If you require clarification regarding the tender you should send your clarification request via Correspondence

Actions

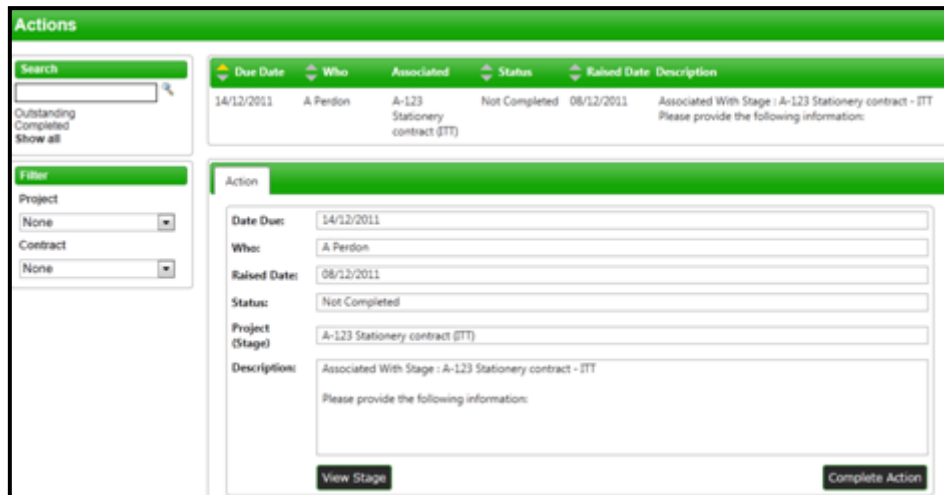
This procedure is used to send you tasks which should be completed by a certain date. The system will send out automatic reminders for you to complete Actions.

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

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



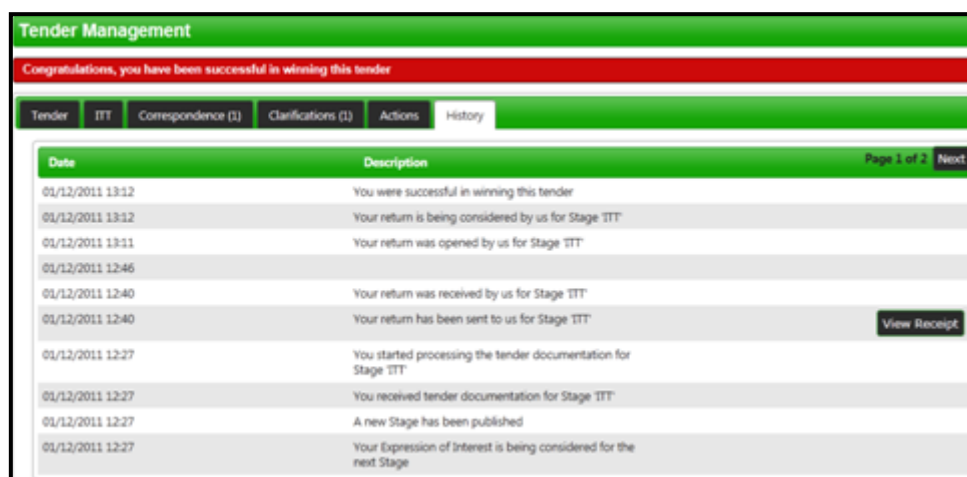
You will be taken you to this screen where you can view details of the action placed against you.



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

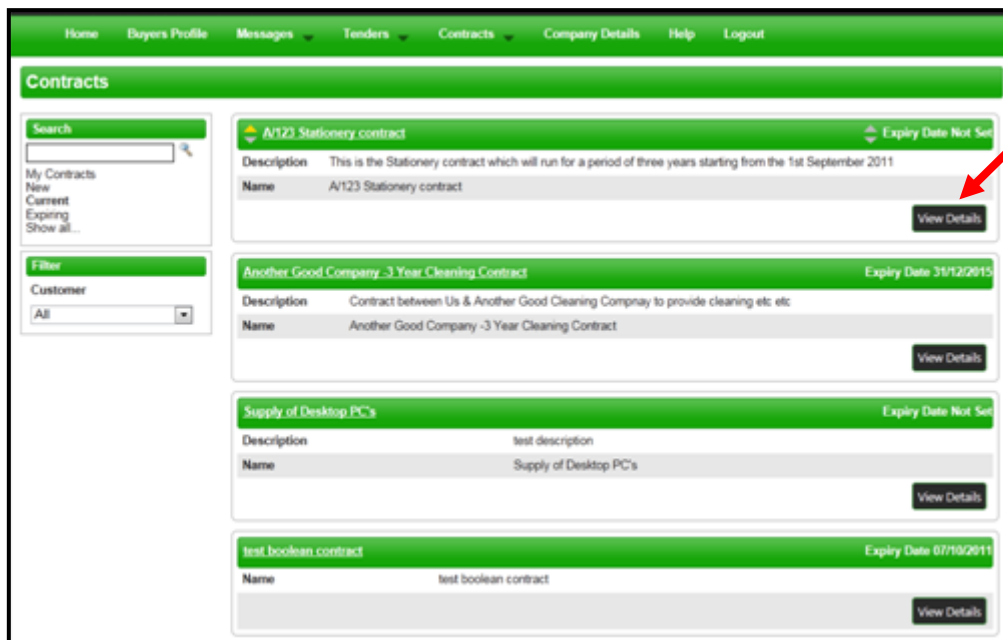
Tender History

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



Contracts

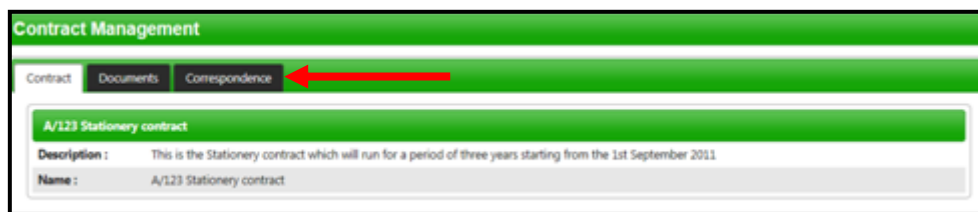
You can view a summary of what Contracts the Institution has running from the **Contracts** heading at the top menu bar (may not be available with some institutions).



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

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

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



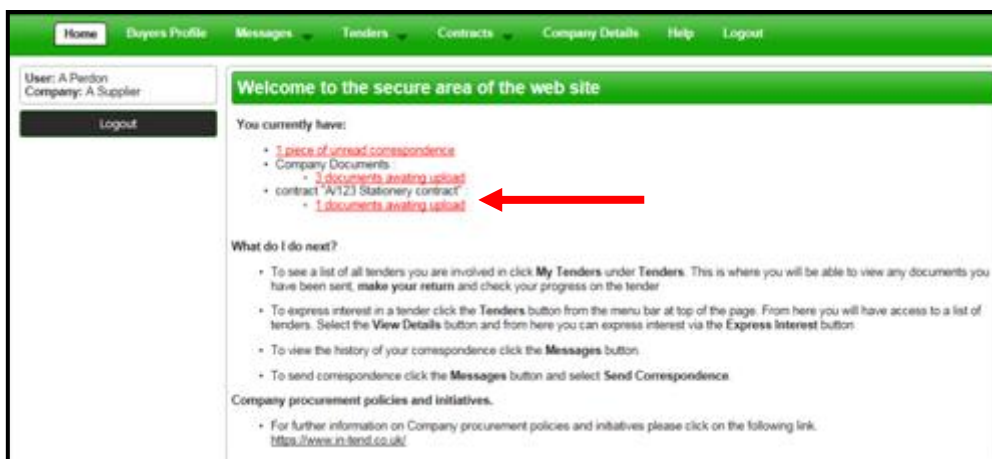
Contract Documents

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

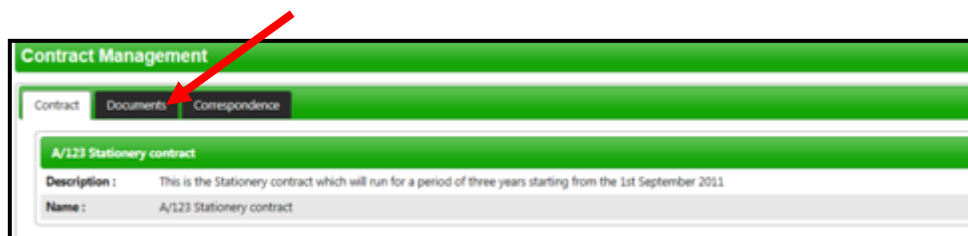
Some documents may have viewing rights only which you cannot replace eg. official contract, agreed terms and conditions etc.

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

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



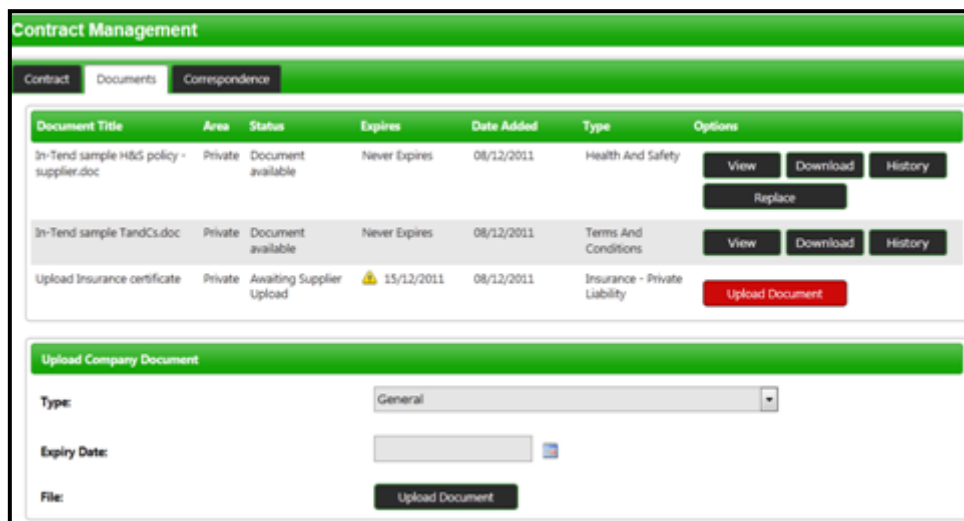
To upload these documents you should click on the red prompt or go into **My Contracts**, click **View Details** of the relevant contract and then click the **Documents** tab.



Managing Contract Documents

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

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



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

In-tend Support

Tel: 0844 2728810

Email: support@in-tend.co.uk