



Improving procurement visibility and control

Atamis TM: Client Briefing Pack

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Quick Reference

What are we required to do for this project?

1. Take part in configuration webinars/workshops
2. Provide configuration details to allow Atamis to generate templates
3. Validate the system configuration
4. Attend training where scheduled

Do we need to install any hardware or software to use Atamis TM?

No, this solution is 100% web-based. However, you can optionally choose to integrate Atamis Tasks and Events with MS Outlook for which there is an Outlook Connector which must be downloaded and installed on each PC.

Is our data secure?

Yes. Your system environment meets recognised third-party enterprise security certifications including ISO27001 and the SysTrust Audit.

Introduction

Thank you for choosing Atamis TM for your eSourcing. This document provides an overview of how your solution will get set up. Atamis TM is part of the Atamis 3.0 Contract Lifecycle Management Application Suite. Atamis solutions are unique in their level of flexibility, so a large part of the implementation approach will concern gathering requirements about how best to configure your eSourcing solution.

Atamis TM Set-up

Larger or more complex implementation projects will have a Project Initiation Document that supersedes this document, but for the majority of implementations there will be three Phases to getting you set up with Atamis TM:

- Configuration
- Pilot and Approval
- Training
- Post-Go-Live Support

Configuration

Before Atamis starts configuring your system, there's some information we'll need to gather from you. This is normally explained over the phone or via a webinar, providing immediate answers where possible and taking away follow-up actions where needed. The requirements are listed below.

The most important areas of configuration are Templates and Procedures: the main requirements can be collected if you simply describe in detail the most common types of eSourcing exercise you undertake. This will enable us to configure a solution best suited to your needs.

Project Templates

Procurement Projects are created from Project Templates. The Templates specify the tasks that need to be completed and the timescales in which they should be done. They are also used to store other pre-configured information including, for example:

- The Procurement Procedure being followed (RFP, ITT, OJEU Open, DPS, etc.)
- Standard questions for suppliers (called Requirements)
- Standard documentation to be made available internally and to suppliers
- Team members (e.g. Approvers or Evaluators)
- OJEU Notices

Your system will be provided with the following standard Templates:

- Project Template: G-Cloud
- Project Template: ITT
- Project Template: OJEU Negotiated
- Project Template: OJEU Open
- Project Template: OJEU Restricted
- Project Template: RFP (Advertised)
- Project Template: RFP (Private)
- Project Template: Single Tender

The list of tasks and associated timeframes for each of these Templates is provided in Appendix 1. You will be trained in how to clone and modify Templates including adjusting the Task timescales but if there are any significant adjustments required, please let us know.

Procurement Procedures

Every Procurement Project must follow a Procedure, and the Procedure dictates the behaviour of the project based on its properties. The default Procedures and properties are as shown below. These can be updated by Atamis during configuration now, or later as part of your support package if required.

Procurement Procedure	Open Registration?	Minimum Tender Period (Days)	Enforce Closing Date/Time? ⁺	OJEU?	Tender Box Opening Proce...	Nbr Members Required to ...	Contains Lots?
G-Cloud Framework Comp...	☐	15	☐	☐	None		☐
RFX (open)	☐	7	☐	☐	None		☐
Single Tender	☐	0	☐	☐	None		☐
Dynamic Purchasing System	☒	30	☐	☒	None		☐
OJEU Restricted	☒	30	☒	☒	Secure Tender Box	2	☐
OJEU Open	☒	30	☒	☒	Secure Tender Box	2	☐
OJEU Negotiated	☒	30	☒	☒	Secure Tender Box	2	☐
Framework Call-Off	☐	20	☒	☐	None		☐
ITT	☐	20	☒	☐	None		☐
RFX (sealed bids)	☐	7	☒	☐	None		☐

We also need to understand your procedure for opening secure tenders, e.g. do you use Key Holders, and if so, for which Procedures?

Also let us know if you sometimes tender for Contracts with Lots.

Pre-Qualification / Standard Questions

If you use pre-qualification questions for some Procurement Procedures, please send them to Atamis. We may be able to build these in to your Templates.

Public Site

Do you require the option to publish tendering opportunities on a public-facing Site?

If you do, you'll still be able to choose which Projects get published. We'll configure this with a standard set of fields which you can review and request changes to be made later.

Supplier Portal

Atamis eSourcing uses a Supplier Portal which will be created on your system following a standard design but with some configuration that we'll discuss with you:

Required	Notes
Portal Name	We recommend "The <i>YourOrgName</i> Portal"
Portal URL	This needs to be in the format https://yourorgname.force.com
Portal Landing Page options	Default text is: "Welcome to the #### Portal. This portal is used to advertise tendering opportunities and enables you to engage directly with #### during the tendering process. It's free to use and will ensure you're kept informed of new opportunities relevant to your business." Up to 4 options: • Login (required) • Register (optional) • Search Public Opportunities (optional) • Search Public Contract Register (optional & requires Atamis CM)
Logo and colours to use in the header	Unless otherwise instructed we'll use the logo on your website
Any other custom pages or documents to be available from the landing page	Note: these are not included in the standard configuration

Email Templates

Please copy and paste the table below to a new document and send it to us if you would like to update any of the Email Templates:

Email	Email Subject	Email Body
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Welcome to the Portal	Welcome to <Portal Name>	Hi <User.FirstName>, Welcome to <Portal Name>. To get started, go to <Portal URL> Username: <User.Username> Thanks, <YourOrgName>
Notify Supplier of Opportunity	Notification of opportunity	We have recently published our intention to invite expressions of interest for a contract that may be of interest to you. The Contract is for ***ENTER NAME OF CONTRACT HERE*** To obtain further information, including all documentation, please follow these steps: 1. Log in to the supplier portal at [URL for Supplier Portal] 2. Locate the opportunity using 'Find Opportunities' 3. Click Register Interest
Notify Supplier of Clarification Answers	Answers to clarification questions	Please see attached document containing answers to clarification questions relating to ***ENTER NAME OF CONTRACT HERE***
Notify Supplier of Award	Contract Award	Thank you for your interest in the requirement for ***ENTER CONTRACT NAME HERE***. I'm pleased to inform you that your bid has been successful. Please find attached a report summarising your evaluation score and feedback. We will be in touch shortly to discuss next steps.
Notify Supplier of Elimination	Contract award decision	Thank you for your interest in the requirement for ***ENTER CONTRACT NAME HERE***. Unfortunately, on this occasion you have not been successful. After evaluating the tenders received against the evaluation model, we intend to award to ***ENTER NAME OF AWARDED SUPPLIER HERE***. Please find attached a report summarising your evaluation score and feedback.

OJEU Notices

Please provide typical examples of each type of OJEU Notice – this will enable us to set up a template with your head office address, NUTS codes and other common settings. It will be possible for authorised users to change these settings on the Templates in future.

User Profiles

User Profiles control the level of access users have to system features such as being able to view or edit data.

Profile	Permissions
Atamis TM Evaluator	View Procurement Projects, view Supplier Responses when made available and enter evaluation scores and comments. Cannot view other Evaluator scores and comments unless specifically shared.
Atamis TM User	Create, edit and complete actions on Procurement Projects. Within each Project, Team Members with this Profile can be allocated special permissions: • Approver • Nominated to Open Tender Box • Receive Clarification Questions and respond
Power User	As per TM User but also can: • administer Supplier Portal Accounts and Contacts as well as other permissions • update Templates
System Admin	As per Power User but can: • administer internal User Accounts • update Procedures • edit Email Templates

Category Structure

What Primary Category Structure would you like to use (if any)?

Note that the system has CPV codes built in for use with OJEU Notices and Contracts Finder Notices. However, for strategic purposes and for general convenience, you can also choose to make use of a Primary Category Structure, e.g. ProClass, eClass, UNSPSC level 2 or 3, etc. This can be used for:

- grouping procurements and contracts
- classifying suppliers
- enabling suppliers to set up alerts when notices are published that meet their settings

Whichever structure is used, it's possible to group categories together to match your own internal category management approach. The Primary Category Structure is not mandatory and can be introduced later if required.

Custom Fields and Page Layouts for Procurement Projects

Although not included in the standard configuration package, we may be able to incorporate small changes to the Project Page including:

- Fields Labels
- Hover Help Text
- Validation Rules (e.g. mandatory fields)

- Page Layout

Further changes can be made via a Change Control procedure and may include:

- New custom fields
- Custom Workflows
- Multiple record types using different page layouts

Home Page Layout

The Home Page will be customised to provide access to the available Atamis Modules based loosely on this design:

Spend Analysis

-  Last 4 Quarters
-  Last FY (Last FY - Advanced)
-  2 FY ago
-  All years
-  Contract Compliance
-  Supplier Spend by Size, Sector & Location
-  Category Spend Analysis
-  Department Spend Analysis
-  Supplier Spend Analysis
-  Spend Re-Classification
-  Atamis SA Video Tutorials

eSourcing

-  Create New Project from Template
-  Sample Procurement Project
-  Sample RFQ Under Evaluation
-  Procurement Project Register
-  My Evaluations
-  Maintain Procurement Templates
-  Maintain Procurement Procedures
-  Tender Opportunities Public Link
-  Supplier Portal Login
(use username: sd@woolridge.com & password: Summer17)
-  Atamis TM Video Tutorials (not yet updated for eSourcing)

Contract Management

-  Contracts
-  Renewals
-  Savings
-  Risk Profile
-  Social Value / CSR
-  Sample Contract Record
-  Contract Register
-  Contracts Requiring Approval
-  Contract Register Report
-  Contract Register Public Link
-  Atamis CM Video Tutorials

Supplier Management

-  Sample Supplier Record
-  Top Suppliers
-  Find a Supplier
-  Risk Management
-  Supplier Performance
-  KPIs Due To Be Scored
-  Poorly Performing Suppliers
-  All Suppliers Report
-  Atamis SRM Video Tutorials

Pipeline Planning

-  Programmes
-  Create New Programme/Initiative
-  Sample Programme Record
-  Programme Register
-  Atamis PM Video Tutorials

Help and Support

Please visit the [Atamis Help Page](#) to access:

- User Guide
- Training Exercises
- Support Contact Details
- Video Tutorials

View recent updates: [Atamis Release Notes](#)
Strategic Guide to using Atamis SA: [Roadmap to Savings](#)

Advanced

-  Upload New Spend Data File
-  Batch Queue

Local Authority additional Dashboards:

Pilot and Approval

Approval of the system and configuration design is sought via a hands-on Pilot eSourcing exercise. Atamis will guide members of the client's Project Team through a full eSourcing and evaluation exercise. If necessary, shortened timescales will be used.

Training

Training requirements will be established at the outset of the project. Training schedules may vary but generally involve an on-site, hands-on training day which includes:

- Atamis TM User training
 - Creating a Procurement Project from a Template
 - Setting up the Requirements
 - Uploading Documents
 - Managing the Team
 - Adding evaluators
 - Creating OJEU and Contracts Finder Notices
 - Publishing to the Tender Opportunities Site
 - Suggesting and inviting suppliers to bid
 - The Supplier Portal
 - Responding to clarification questions
 - Opening a secure tender box
 - Starting the evaluation process
 - Sharing evaluation tasks access
 - Monitoring evaluation progress
 - Evaluation Matrix, Variance reporting and consensus scoring
 - Notifying successful/unsuccessful bidders and standstill periods
- Atamis TM Evaluator training
 - My Evaluations
 - Viewing Responses and entering scores & comments
- Portal Administration training

Post-Go-Live Support

After go-live, the Atamis support team will be actively contacting you to provide on-hand help and support through your first trial and live eSourcing exercises. This is partly to enforce the content provided at the training and also to validate that your eSourcing solution has been configured correctly.

The [Atamis User Guide](#) will also be available to users via the Home Page of the system.

Appendix 1: Project Template Tasks

Subject	Action Type	eSourcing Milestone	Days Remaining	Guidance
Project Template: ITT (13 tasks)				
Start Requirements Collection & Evaluation Planning	-	-	76	Add Requirement Sections (e.g. Service, Cost, etc.) and for each Section add details of Requirements you wish suppliers to respond to. If you're using Evaluation, remember to set the Weighting field for each Section and for all the Requirements.
Publish Opportunity on Portal	Publish Opportunity	-	57	Click Do Now to make this opportunity publicly available for suppliers to view and register expressions of interest (after the Registration Starts date). Remember to attach all supplier documentation in "Shared Document Folders".
Response Window Opens	-	Responses Open	55	No action required: at the specified date and time, invited/registered suppliers will become able to start responding to requirements via the portal.
Suggest Suppliers	Suggest Suppliers	-	55	First enter the Category for this Contract, then click Do Now to get the system to search your current Suppliers to identify those with matching Default Category.
Invite Suppliers	Invitation	-	55	Click Do Now to compose an email that will notify suppliers on the Suppliers Bidding list with a formal invitation to participate in this procurement.
Send Reminder for Clarifications Deadline	Email	-	48	Click Do Now to compose an email to remind suppliers of the deadline for clarification questions.
Deadline for Clarification Questions	-	Deadline for Clarification Questions	41	No action required: Suppliers are made aware of this deadline in the Portal, and after the specified date and time, suppliers attempting to raise a clarification question will receive a warning telling them that questions may not be answered.
Confirm Evaluators	-	-	41	In order to do the Evaluation Scoring in the system, Evaluators now need to be set up for each Requirement Section. To do this Open each Requirement Section and click Add Evaluator.

Response Window Closes (Submission Deadline)	-	Responses Close	34	No action required: After the specified date and time, Suppliers will no longer be able to make changes to their tender submission (unless late submissions are enabled).
Start Evaluation	Start Evaluation	-	34	Click Do Now to trigger auto-scoring and enable Evaluators to start viewing supplier responses and entering scores.
Complete Evaluation and Award Recommendations	Award	-	20	Click Do Now to set the Award Recommendations for the Contract (or by Lot if Procedure includes Lots).
Send Award/Elimination Notifications	Email	-	20	To compose a standard acceptance/elimination email to selected suppliers, click Do Now. To send separate emails to each supplier: 1) click on a Primary Supplier Contact 2) click the Send an Email button 3) click Select Template
Contract Start	-	-	0	When the contract is signed, add the contract record to the Contracts Register by changing the Record Type from Procurement to Contract.
Project Template: OJEU Negotiated (20 tasks)				
Start Requirements Collection & Evaluation Planning	-	-	216	Add Requirement Sections (e.g. Service, Cost, etc.) and for each Section add details of Requirements you wish suppliers to respond to. If you're using Evaluation, remember to set the Weighting field for each Section and for all the Requirements.
Obtain Procurement Approval	-	-	195	Secure internal approval to proceed with this procurement and record the approval details on the Project.
Approve PQQ Definition	Approve Requirement Sections	-	161	When you've set up all the PQQ criteria, click Do Now to approve the Requirement Section(s) relating to pre-qualification only.
				In the Portal, Suppliers will only be able to respond to Requirement Sections marked as Approved.

Publish Opportunity on Portal	Publish Opportunity	Registration Starts	160	Click Do Now to make this opportunity publicly available for suppliers to view and register expressions of interest (after the Registration Starts date). Remember to attach all supplier documentation in "Shared Document Folders".
Publish OJEU Contract Notice	OJEU Notice	-	160	Click Do Now to open an existing/template OJEU Notice or create a new one if none exists.
Publish PQQ	-	Responses Open	160	-
PQQ Submission Deadline	-	Responses Close	146	No action required. Suppliers cannot respond to PQQ criteria after the specified date/time unless Late Submissions is enabled on the Supplier Bidding page.
PQQ Evaluation Complete	New Procurement Stage	-	123	For each Supplier Bidding that meets the pre-qualification criteria, check the box "Shortlisted?".
Approve Requirements Definition	Approve Requirement Sections	-	104	When you've set up all the Requirement Sections, click Do Now either to assign this task to an Approver on the Procurement Team or approve them yourself. You can't invite suppliers or let them register interest until the Requirement Sections are approved.
Response Window Opens	-	Responses Open	102	No action required: at the specified date and time, invited/registered suppliers will become able to start responding to requirements via the portal.
Send Reminder for Clarifications Deadline	Email	-	93	Click Do Now to compose an email to remind suppliers of the deadline for clarification questions.
Deadline for Clarification Questions	-	Deadline for Clarification Questions	86	No action required: Suppliers are made aware of this deadline in the Portal, and after the specified date and time, suppliers attempting to raise a clarification question will receive a warning telling them that questions may not be answered.
Confirm Evaluators	-	-	79	In order to do the Evaluation Scoring in the system, Evaluators now need to be set up for each Requirement Section. To do this Open each Requirement Section and click Add Evaluator.
Response Window Closes (Submission Deadline)	-	Responses Close	71	No action required: After the specified date and time, Suppliers will no longer be able to make changes to their tender submission (unless late submissions are enabled).
Start Evaluation	Start Evaluation	-	70	Click Do Now to trigger auto-scoring and enable Evaluators to start viewing supplier responses and entering scores.

Complete Evaluation and Award Recommendations	Award	-	41	Click Do Now to set the Award Recommendations for the Contract (or by Lot if Procedure includes Lots).
Send Award/Elimination Notifications	Email	WAIT (Standstill Period Starts)	41	To compose a standard acceptance/elimination email to selected suppliers, click Do Now. To send separate emails to each supplier: 1) click on a Primary Supplier Contact 2) click the Send an Email button 3) click Select Template
Standstill Period Finished	-	GO (Standstill Period Ends)	27	No action required.
Contract Start	-	-	0	When the contract is signed, add the contract record to the Contracts Register by changing the Record Type from Procurement to Contract.
Publish OJEU Contract Award Notice	OJEU Notice	-	0	If you have previously created a Contract Award Notice, use the Clone All Details button to create a pre-populated Contract Award Notice and enter the Award Section details.

Project Template: OJEU Open (17 tasks)

Start Requirements Collection & Evaluation Planning	-	-	142	Add Requirement Sections (e.g. Service, Cost, etc.) and for each Section add details of Requirements you wish suppliers to respond to. If you're using Evaluation, remember to set the Weighting field for each Section and for all the Requirements.
Obtain Procurement Approval	-	-	121	Secure internal approval to proceed with this procurement and record the approval details on the Project.
Approve Requirements Definition	Approve Requirement Sections	-	95	When you've set up all the Requirement Sections, click Do Now either to assign this task to an Approver on the Procurement Team or approve them yourself. You can't invite suppliers or let them register interest until the Requirement Sections are approved.
Publish Opportunity on Portal	Publish Opportunity	Registration Starts	93	Click Do Now to make this opportunity publicly available for suppliers to view and register expressions of interest (after the Registration Starts date). Remember to attach all supplier documentation in "Shared Document Folders".

Response Window Opens	-	Responses Open	93	No action required: at the specified date and time, invited/registered suppliers will become able to start responding to requirements via the portal.
Publish OJEU Contract Notice	OJEU Notice	-	93	Click Do Now to open an existing/template OJEU Notice or create a new one if none exists.
Contracts Finder Notice	Contracts Finder Notice	-	93	Click Do Now to create an Opportunity Notice on Contracts Finder
Send Reminder for Clarifications Deadline	Email	-	83	Click Do Now to compose an email to remind suppliers of the deadline for clarification questions.
Deadline for Clarification Questions	-	Deadline for Clarification Questions	76	No action required: Suppliers are made aware of this deadline in the Portal, and after the specified date and time, suppliers attempting to raise a clarification question will receive a warning telling them that questions may not be answered.
Confirm Evaluators	-	-	69	In order to do the Evaluation Scoring in the system, Evaluators now need to be set up for each Requirement Section. To do this Open each Requirement Section and click Add Evaluator.
Response Window Closes (Submission Deadline)	-	Responses Close	62	No action required: After the specified date and time, Suppliers will no longer be able to make changes to their tender submission (unless late submissions are enabled).
Start Evaluation	Start Evaluation	-	61	Click Do Now to trigger auto-scoring and enable Evaluators to start viewing supplier responses and entering scores.
Complete Evaluation and Award Recommendations	Award	-	41	Click Do Now to set the Award Recommendations for the Contract (or by Lot if Procedure includes Lots).
Send Award/Elimination Notifications	Email	WAIT (Standstill Period Starts)	41	To compose a standard acceptance/elimination email to selected suppliers, click Do Now. To send separate emails to each supplier: 1) click on a Primary Supplier Contact 2) click the Send an Email button 3) click Select Template
Standstill Period Finished	-	GO (Standstill Period Ends)	27	No action required.
Contract Start	-	-	0	When the contract is signed, add the contract record to the Contracts Register by changing the Record Type from Procurement to Contract.

Publish OJEU Contract Award Notice	OJEU Notice	-	0	If you have previously created a Contract Award Notice, use the Clone All Details button to create a pre-populated Contract Award Notice and enter the Award Section details.
Project Template: OJEU Restricted (20 tasks)				
Start Requirements Collection & Evaluation Planning	-	-	202	Add Requirement Sections (e.g. Service, Cost, etc.) and for each Section add details of Requirements you wish suppliers to respond to. If you're using Evaluation, remember to set the Weighting field for each Section and for all the Requirements.
Obtain Procurement Approval	-	-	167	Secure internal approval to proceed with this procurement and record the approval details on the Project.
Approve PQQ Definition	Approve Requirement Sections	-	133	When you've set up all the PQQ criteria, click Do Now to approve the Requirement Section(s) relating to pre-qualification only.
				In the Portal, Suppliers will only be able to respond to Requirement Sections marked as Approved.
Publish Opportunity on Portal	Publish Opportunity	Registration Starts	132	Click Do Now to make this opportunity publicly available for suppliers to view and register expressions of interest (after the Registration Starts date). Remember to attach all supplier documentation in "Shared Document Folders".
Publish OJEU Contract Notice	OJEU Notice	-	132	Click Do Now to open an existing/template OJEU Notice or create a new one if none exists.
Publish PQQ	-	Responses Open	132	-
PQQ Submission Deadline	-	Responses Close	125	No action required. Suppliers cannot respond to PQQ criteria after the specified date/time unless Late Submissions is enabled on the Supplier Bidding page.
PQQ Evaluation Complete	-	-	123	For each Supplier Bidding that meets the pre-qualification criteria, check the box "Shortlisted?".

Approve Requirements Definition	Approve Requirement Sections	-	95	When you've set up all the Requirement Sections, click Do Now either to assign this task to an Approver on the Procurement Team or approve them yourself. You can't invite suppliers or let them register interest until the Requirement Sections are approved.
Response Window Opens	-	Responses Open	93	No action required: at the specified date and time, invited/registered suppliers will become able to start responding to requirements via the portal.
Send Reminder for Clarifications Deadline	Email	-	83	Click Do Now to compose an email to remind suppliers of the deadline for clarification questions.
Deadline for Clarification Questions	-	Deadline for Clarification Questions	76	No action required: Suppliers are made aware of this deadline in the Portal, and after the specified date and time, suppliers attempting to raise a clarification question will receive a warning telling them that questions may not be answered.
Confirm Evaluators	-	-	69	In order to do the Evaluation Scoring in the system, Evaluators now need to be set up for each Requirement Section. To do this Open each Requirement Section and click Add Evaluator.
Response Window Closes (Submission Deadline)	-	Responses Close	62	No action required: After the specified date and time, Suppliers will no longer be able to make changes to their tender submission (unless late submissions are enabled).
Start Evaluation	Start Evaluation	-	61	Click Do Now to trigger auto-scoring and enable Evaluators to start viewing supplier responses and entering scores.
Complete Evaluation and Award Recommendations	Award	-	41	Click Do Now to set the Award Recommendations for the Contract (or by Lot if Procedure includes Lots).
Send Award/Elimination Notifications	Email	WAIT (Standstill Period Starts)	41	To compose a standard acceptance/elimination email to selected suppliers, click Do Now. To send separate emails to each supplier: 1) click on a Primary Supplier Contact 2) click the Send an Email button 3) click Select Template
Standstill Period Finished	-	GO (Standstill Period Ends)	27	No action required.
Contract Start	-	-	0	When the contract is signed, add the contract record to the Contracts Register by changing the Record Type from Procurement to Contract.

Publish OJEU Contract Award Notice	OJEU Notice	-	0	If you have previously created a Contract Award Notice, use the Clone All Details button to create a pre-populated Contract Award Notice and enter the Award Section details.
Project Template: Quick RFQ (9 tasks)				
Start Requirements Collection & Evaluation Planning	-	-	20	Quick RFQs have one Requirement Section pre-populated requesting the supplier(s) to attach their quote. Click on the Requirement Section and modify the Requirements if necessary.
Approve Requirements Definition	Approve Requirement Sections	-	19	When you've set up your Requirement, click Do Now approve it. You can't invite suppliers or let them register interest until the Requirement Sections are approved.
Response Window Opens	-	Responses Open	19	No action required: at the specified date and time, invited/registered suppliers will become able to start responding to requirements via the portal.
Suggest Suppliers	Suggest Suppliers	-	19	First enter the Category for this Contract, then click Do Now to get the system to search your current Suppliers to identify those with matching Default Category.
Invite Suppliers	Invitation	-	19	Click Do Now to compose an email that will notify suppliers on the Suppliers Bidding list with a formal invitation to participate in this procurement.
Response Window Closes (Submission Deadline)	-	Responses Close	11	No action required: After the specified date and time, Suppliers will no longer be able to make changes to their tender submission (unless late submissions are enabled).
Complete Evaluation and Award Recommendations	Award	-	10	Click Do Now to set the Award Recommendations for the Contract (or by Lot if Procedure includes Lots).
Finalise and Sign Contract	-	-	6	When the contract is signed, add the contract record to the Contracts Register by changing the Record Type from Procurement to Contract.
Contract Start	-	-	0	When the contract is signed, add the contract record to the Contracts Register by changing the Record Type from Procurement to Contract.
Project Template: RFP (Advertised) (12 tasks)				
Start Requirements Collection & Evaluation Planning	-	-	72	Attach document(s) detailing your requirements in a Shared Document Folder.

Publish Open Opportunity on Contracts Finder	Contracts Finder Notice	-	37	Click Do Now to create a Contracts Finder Notice of type Open Opportunity. Complete required fields then submit.
Publish Opportunity on Portal	Publish Opportunity	Registration Starts	36	Click Do Now to make this opportunity publicly available for suppliers to view and register expressions of interest (after the Registration Starts date). Remember to attach all supplier documentation in "Shared Document Folders".
Response Window Opens	-	Responses Open	34	No action required: at the specified date and time, invited/registered suppliers will become able to start responding to requirements via the portal.
Suggest Suppliers	Suggest Suppliers	-	34	First enter the Category for this Contract, then click Do Now to get the system to search your current Suppliers to identify those with matching Default Category.
Invite Suppliers	Invitation	-	34	Click Do Now to compose an email that will notify suppliers on the Suppliers Bidding list with a formal invitation to participate in this procurement.
Deadline for Clarification Questions	-	Deadline for Clarification Questions	27	No action required: Suppliers are made aware of this deadline in the Portal, and after the specified date and time, suppliers attempting to raise a clarification question will receive a warning telling them that questions may not be answered.
Response Window Closes (Submission Deadline)	-	Responses Close	20	No action required: After the specified date and time, Suppliers will no longer be able to make changes to their tender submission (unless late submissions are enabled).
Start Evaluation	Start Evaluation	-	20	Click Do Now to trigger auto-scoring and enable Evaluators to start viewing supplier responses and entering scores.
Complete Evaluation and Award Recommendations	Award	-	17	Click Do Now to set the Award Recommendations for the Contract (or by Lot if Procedure includes Lots).
Send Award/Elimination Notifications	Email	-	17	To compose a standard acceptance/elimination email to selected suppliers, click Do Now. To send separate emails to each supplier: 1) click on a Primary Supplier Contact 2) click the Send an Email button 3) click Select Template
Contract Start	-	-	0	When the contract is signed, add the contract record to the Contracts Register by changing the Record Type from Procurement to Contract.

Project Template: RFP (Private) (10 tasks)

Start Requirements Collection & Evaluation Planning	-	-	72	Attach document(s) detailing your requirements in a Shared Document Folder.
Response Window Opens	-	Responses Open	34	No action required: at the specified date and time, invited/registered suppliers will become able to start responding to requirements via the portal.
Suggest Suppliers	Suggest Suppliers	-	34	First enter the Category for this Contract, then click Do Now to get the system to search your current Suppliers to identify those with matching Default Category.
Invite Suppliers	Invitation	-	34	Click Do Now to compose an email that will notify suppliers on the Suppliers Bidding list with a formal invitation to participate in this procurement.
Deadline for Clarification Questions	-	Deadline for Clarification Questions	27	No action required: Suppliers are made aware of this deadline in the Portal, and after the specified date and time, suppliers attempting to raise a clarification question will receive a warning telling them that questions may not be answered.
Response Window Closes (Submission Deadline)	-	Responses Close	20	No action required: After the specified date and time, Suppliers will no longer be able to make changes to their tender submission (unless late submissions are enabled).
Start Evaluation	Start Evaluation	-	20	Click Do Now to trigger auto-scoring and enable Evaluators to start viewing supplier responses and entering scores.
Complete Evaluation and Award Recommendations	Award	-	17	Click Do Now to set the Award Recommendations for the Contract (or by Lot if Procedure includes Lots).
Send Award/Elimination Notifications	Email	-	17	To compose a standard acceptance/elimination email to selected suppliers, click Do Now. To send separate emails to each supplier: 1) click on a Primary Supplier Contact 2) click the Send an Email button 3) click Select Template
Contract Start	-	-	0	When the contract is signed, add the contract record to the Contracts Register by changing the Record Type from Procurement to Contract.

Project Template: Single Tender (4 tasks)

Response Window Opens	-	Responses Open	27	No action required: at the specified date and time, invited/registered suppliers will become able to start responding to requirements via the portal.
Invite Suppliers	Invitation	-	27	Click Do Now to compose an email that will notify suppliers on the Suppliers Bidding list with a formal invitation to participate in this procurement.
Response Window Closes (Submission Deadline)	-	Responses Close	27	No action required: After the specified date and time, Suppliers will no longer be able to make changes to their tender submission (unless late submissions are enabled).
Contract Start	-	-	0	When the contract is signed, add the contract record to the Contracts Register by changing the Record Type from Procurement to Contract.
Project Template: G-cloud (5 tasks)				
Produce Longlist and Shortlist	-	-	35	Please refer to G-Cloud for instructions on following this procedure.
Issue Clarifications to Shortlisted Suppliers	-	-	31	-
Finalise and Sign Contract	-	-	13	-
Produce Search & Evaluation Form	-	-	13	-
Contract Start	-	-	0	-