



SCMS step by step guide.

Prior knowledge / Preparation

1. Are there any framework contracts, approved lists, preferred providers already in place that you can use? Have you checked on the Contract Information System? (<http://cis.leeds.gov.uk>) or the OGC Contracts database?
2. Is the value of the procurement over £20,000? If it is then the scheme will have to be advertised on SCMS, a mini procurement exercise carried out and an advertisement will have to be placed on the bulletin board. If the value is below £20,000 then three written quotes where practical is recommended.
3. Have all the documents been prepared? The document templates are available from the Commissioning, Procurement and Business Development website([http://www.leedsadviceforschools.com/procurement/Quotation %20Documents.htm](http://www.leedsadviceforschools.com/procurement/Quotation%20Documents.htm)) The most important document being the specification and evaluation criteria. The documentations should be as follows

Simple Procurements (Quotations)	More Complex Procurements (Tender)
<p>Invitation to Quote</p> <ul style="list-style-type: none"> • Includes Specification, Pricing Schedule, Evaluation Criteria (including the percentage of marks to be awarded to price and quality), Documents required to be submitted by the tenderers 	<p>Invitation to Tender</p> <ul style="list-style-type: none"> • Includes Specification, Evaluation Criteria (including the percentage of marks to be awarded to price and quality), Documents required to be submitted by the tenderers
<p>Terms and Conditions</p> <ul style="list-style-type: none"> • Choose one of the Standard LCC terms and Conditions for Goods, Services and Works 	<p>Items to be Returned</p> <ul style="list-style-type: none"> • Includes Form of Tender, Declaration of Non Collusive Tendering, Pricing Schedules etc
<p>Return Label In case a tenderer wants to return a hard copy. You must put the address on the label where you want hard copies returned</p>	<p>Terms and Conditions</p> <ul style="list-style-type: none"> • Choose one of the Standard LCC terms and Conditions for Goods, Services and Works
	<p>Return Label</p> <ul style="list-style-type: none"> • In case a tenderer wants to return a hard copy. You must put the address on the label where you want hard copies returned.

4. If you are unsure on any of the above then please contact the Commissioning, Procurement and Business Development team on 0113 24 75268
5. You should now be sure that you need to place an advertisement on SCMS

Placing an advertisement on SCMS.

6. To place a scheme on SCMS you must first visit the website <http://scms.alito.co.uk> and log on using your personal login details. If you don't have any login details contact the SCMS helpdesk on 0113 24 74001 and they will provide them for you. Don't forget to tell them you are from a school and that you need access rights to be able to create schemes on SCMS.
7. Next access the Tender Module by clicking on the red square entitled 'Tender' on the top right hand side of the screen.
8. This screen can be used to search for any existing tenders / quotations or you can start a new exercise by clicking on the 'new' icon on the top left of the screen.
 - a. To search for an existing tender exercise then fill in the 'contract ref' or 'tender title contains' box and click on the word 'Go' at the top of the screen. Results are displayed on the left hand side of the screen.
 - b. When starting a new exercise you should always create a new scheme
9. After clicking on the 'new' icon, on the next screen enter the value of the tender exercise in the relevant box and the category with which the tender exercise falls. A full list of alito categories is available on the website www.leedsadviceforschools.com. You are not creating a new framework contract so make sure that this option is selected as 'no'
 - a. If a current framework contract is already in place for the alito category that you have already selected then you will be presented with the option to use this current framework contract. As you should have already checked on the Contract Information System to see if there are any current contracts in place select 'next' and skip this section.
10. Select the correct School Template. Templates have been set up so that it is as easy as possible for schools to use the system. These templates are called 'SCHOOL only quotations' and there is a template for supplies, services, works and quotations. You should select the most relevant one to the procurement.
11. Give the Scheme a reference. This should be prefixed with 'LCCEDUC' then something to identify your school and then a number. For example LCCEDUCBRU01 or LCCEDUC001BRU. Make sure that each scheme you

do has a unique reference number.

12. Give the scheme a title For example 'Provision of a Cashless System for Bruntcliffe High School'
13. Insert a start date. This will be the date you want the work to start. Be sure to allow prospective companies plenty of time to prepare and submit a bid.
14. Insert the duration of the contract in months
15. Select a department from the list. You should select 'Education Leeds'
16. Insert a small description of your scheme. This is what will be displayed on the advertisement on the bulletin board. Try to be detailed without being overlong.
17. You are using an e-tender so leave the default setting as yes.
18. Tender Team Members can be added here. Whoever creates the scheme will automatically become the contract manager. Sheila Goodwin and Ian Westlake will also be added to the schemes so that we can monitor the usage of SCMS. You can add anyone to the team to have administrative access and someone will need to be the Tender Opening Officer. This is because a specific officer must conduct the 'tender opening ceremony' and break the time lock imposed on the scheme.
19. The scheme has now been created and there is some admin to do on each of the tabs created.

Summary Tab

20. This tab will allow you to change any of the details you have previously inputted.
21. You will also need to make a procurement decision on which procedure you are going to use. There are two choices
 - a. **Restricted – Non EU** – This is the default setting. If you choose to use this procedure then you will select the companies you want to invite to bid and send them correspondence pointing them towards your documents. It will only be these firms that can access your documents.
 - b. **Open – Non EU** – This is the second option available to you. If you select this procedure then there will be no need to select or send correspondence to suppliers. Instead the SCMS will send an alert to every supplier registered in the category. Please note that this could be a lot and you will have to evaluate every response you get.

The open procedure is preferred in order to achieve best value from the open market

Team Tab

22. Use this tab to add any additional team members to the scheme. Regular team members must be selected as a 'Tender Team Member'. Each scheme will need two people on the team; one must act as 'tender opening officer'. If required CPBD will act as the tender opening officer. To add a tender opening officer click on the word 'add' and search for the name of the person you want to add. Select their role and click on save. This person will then be added to your team.

Actions Tab

23. This is where you can set yourself reminders of any things you have to do on the SCMS system. The main actions will already be set up to remind you what to do - you just put the dates in to tell the system when to remind you.

24. The following actions come as standard.

- a. Move (Publish) from Bid to Under Evaluation – This is done after the closing date has passed in order for the tender to be 'opened'
- b. Conduct tender opening ceremony – This is breaking the time lock so you can access documents that have been submitted.
- c. Notify successful / unsuccessful tenderers – this is sending emails to bidders informing them how they have fared in the scheme.

25. You can set yourself email reminders to do these things by clicking on the action and assigning a schedule date for the task and selecting yes in the remind field. Don't forget to click update.

26. Once you have completed an action change the status to 'complete' and click update.

It is not essential to use the actions tab.

Tenderers Tab

27. On this tab is where you select which suppliers you want to invite to submit a bid for your scheme. You have two options depending on the procedure you have selected

Restricted Procedure

- a. Click on source and select a specific tenderer, finding them by alito category or postcode, and source them to your scheme. The supplier must already be registered on SCMS. If this is done correctly then the name of the supplier should appear on the tenderers tab. You must then send the company correspondence to alert them to your scheme
- b. You must then change the status of these companies to invited by putting a tick in the box at the end of the row and then changing the ITT status of the company to 'invited' clicking on the save button next to status.

Open Procedure

- c. Don't source any suppliers and rely on the suppliers seeing your advert on the bulletin board or responding to the alert that the system generates. There is nothing stopping you ringing up a particular supplier and informing them that the scheme is on the SCMS system and asking them to register and bid. (Should a supplier have a problem accessing the system then they should be referred to the SCMS helpdesk on 0113 247 4001)

Each supplier will have to be registered on the SCMS system before they can be added to the scheme but registration is a straight forward process. The open procedure is preferred in order to achieve best value from the open market.

Attachments

28. Use the attachments tab to upload all the documents that you have previously prepared. These are attached to the website in the same way that documents are attached to an e-mail. It is important that when attaching these documents to the website that they are all visible to suppliers. You do this by selecting 'yes' when asked.

In order to add a document click on the word 'add' and then give the document a title and then browse for the file path. Click ok to attach it to the scheme.

Correspondence – Only if using the Restricted Procedure

29. The correspondence tab can then be used to alert any of the previously sourced suppliers to your documents. You can send the primary contact of the company an e-mail by clicking on the word 'add' at the bottom of the screen and following the on screen instruction.

30. There are templates of each type of letter to select from. To send the correct information select the template 'Tender Invitation Letter' and fill in the details on the letter where appropriate.

Publish

31. To place your advertisement on the SCMS bulletin board it must be published at the correct stage
 - a. Click on the publish button
 - b. Select the stage as the **bid** stage
 - c. Select the date and time that you want the scheme to close
 - d. Make sure that each of the publishing options is set to yes except for 'questions'
 - e. Click Publish and Finish

Your advert is then published on the bulletin board for each supplier registered on the system to see.

Opening the tender and downloading the documents.

32. You must now wait for any potential suppliers to access your documents and submit a response.
33. After the deadline has passed you must change the publish status from 'bid' to 'under evaluation'. An email alert could be set up to remind you that this needs to be done. Do this by accessing the publish tab and following the instructions as before
 - a. Click on the publish button
 - b. Select the stage as the 'under evaluation' stage
 - c. Make sure that each section is set to no except for 'notice'
 - d. Click Publish and Finish
34. Once your deadline has passed the tender opening officer must log in to the system and search for your tender using the search facility and access the 'tenderers' tab.
35. There will be an option to 'open' this tender at the bottom of the list of tenderers.
36. Click this option; confirm it and the Tender will now be open.

Downloading the Documents

37. Next to each supplier that has submitted a bid there will be green tick and a small eye symbol. If you click on this symbol the system will display a list of the documents that the supplier has submitted.
38. Next to each document that the supplier has submitted there will be a large red arrow pointing downwards. If you click on this arrow you will be presented with the option to 'open' or 'save' the document. It is recommended that you save this document in a file on you computer specifically designed for tender responses for this scheme.
39. This process must then be repeated for each of the suppliers that have submitted a response. It is more than likely that most suppliers have submitted more than one document so each document will need to be downloaded individually
40. You now have all documentation saved locally on you computer.

Evaluating the Responses.

41. You will then have to evaluate each response that you have received using the evaluation criteria previously stated in the tender documents.
42. You should use some sort of model that plots your comments on each suppliers submission so you have an auditable trail.

43. Once you have decided upon a supplier using the evaluation criteria you can notify them through the system.

Letters of acceptance.

44. To notify the successful supplier you should log back into the system and search for your tender scheme.

45. Go to the tenderers tab and put a tick in the box next to the successful supplier. At the bottom of the page in the drop down menu next to 'ITT Status' select 'accepted' and then click on the save icon next to the drop down menu. This will change the status of the winning supplier from 'shortlisted' to 'accepted'

46. You will then be required to select the correspondence tab and send an e-mail to the successful tenderer and e-mails to the unsuccessful tenderers. Do this in the same way as you notified prospective tenderers but use the letter templates 'contract award' and 'unsuccessful tender'. You will be reminded of this if you have set up the alerts

47. Once these emails have been sent and the contract has commenced then you must use the Publish tab to publish a contract award notice.

48. The next step is to publish details of your bid award on the bulletin board. Do this by clicking on the Publish tab.

- a. Click on the publish button
- b. Select the stage as the 'contract award' stage
- c. Fill in the details of the company in which you have awarded the scheme to
- d. Click the contract award stage
- e. Click Publish and Finish

Creating a contract

49. Finally in order to move the exercise from the tender stage to the contract module on the system return to the tenderers tab and if all previous steps have been done correctly then you should be presented with an option to 'create contract'. Select this and follow the instruction to move the scheme over to the contract module.

You have now finished your quotation exercise.

If you have any problems please don't hesitate to contact the Commissioning, Procurement and Business Development team on 0113 2475268 or the SCMS helpdesk on 0113 2474001