MINI GUIDE

CAPTURE A MINI COMPETITION FOR SUPPLIERS (ISS)
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1. DOCUMENT APPROVAL

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1.1. DOCUMENT CONTROL

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<td>Christina Meyer</td>
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2. AIM

The aim of this document is to provide a guide for suppliers when responding to a mini competition published by NHS SC.

3. PREREQUISITES

- Suppliers will need to be a registered user of the system.
- The supplier has already expressed interest in the relevant sourcing event.
- The supplier has been included in the Framework Agreement contract award.
- NHS SC has invited the supplier to participate in the published mini competition.
  The supplier will get an email notification when they are invited to participate in a mini competition.

Note: Please refer to the Supplier1_Logging On & Supplier Dashboard Mini Guide for details.

4. SELECTING THE APPROPRIATE MINI COMPETITION

Note: The supplier will only have access to the mini competitions that they have been invited to. NHS SC will determine if and when a mini competition is to be issued during the framework agreement contract duration.
To access the Mini Competition, select the START menu from the desktop.

When the START menu opens, use the path: My Business Opportunities > My Mini Competitions to access the list of available mini competitions.

1. The ‘Capture a Mini Competition’ form will open with the Mini Competition tab active.

2. Select the required mini competition from the list available by clicking on the appropriate line.

Note: If the user does not select a line, but clicks on the ‘NHS SC DOCUMENTS’ or any other tab before selecting a mini competition, the following error message will appear, indicating that no mini competition had
Select the NHS SC DOCUMENTS tab. This will open a DMS (Document Management System) window from which the documents that the NHS SC Buyer attached to the Mini Competition header can be viewed.

To open the documents, right click on a file name and select the Open Item option provided.

The document will download and automatically open in MS Word, MS Excel or PDF, depending on the document type in which it was attached.

The system logs that documents have been opened and will display the count of opened and viewed documents on the Supplier Dashboard for the relevant sourcing event.

Guidance note: It is highly recommended that suppliers open and review all NHS SC documents to ensure the information provided by NHS SC has been reviewed.

Select the SUPPLIER HEADER DOCUMENTS button. This will open a DMS window where suppliers can upload required supporting documents which are relevant to the whole Mini Competition. Documents can be uploaded in any file format including .Doc, .Xls, PDF etc.
Select the Upload New File(s) button, locate the relevant documents (as you would with any office application), select the documents and select the Open option. The selected files will be added to the Supplier Documents of the Select Mini Competition tab.

4.1. MINI COMPETITION QUESTIONNAIRE

Select the Mini Comp Questionnaire tab. This tab contains a list of questions that are applicable to all lots on the mini competition. Therefore this set of questions has been added to the mini comp header, and only needs to be answered once per mini competition.

Note: This tab will be blank if no mini comp questionnaire was included in the mini competition.

This tab displays an expandable list on the left hand side of the tab, which is referred to as the tree view, and the list of questions that are displayed when a Mini Comp Questionnaire section is selected.
Initially the Tree View will open with the folders closed. **Select on the top folder first by clicking on it.**

Then expand the Mini Competition Questionnaire folders by clicking on the (arrow) next to the folder.

The selected folder will expand. The expanded folder will be indicated by the arrow which has now changed to a black arrow.

Click on a Mini Comp Questionnaire section to display its linked questions in the right hand side of the tab.

**Note:** Steps 1 and 2 above must be repeated every time this tab is selected.

Read each of the questions carefully. The scroll bar on the right of the questions (if one is present) can be used to scroll up and down through the list of questions.

**Note:** Keep a note of any supporting documents requested to ensure you have uploaded these as part of the Supplier Lot Documents before Submitting the final tender response.

Complete the response to the question in the field provided by typing a free text answer, or by making a selection from the list that is provided where a lookup function is present in the answer field.
Note: Where free test responses are required, the supplier’s response is limited to a maximum of 4000 characters per answer.

Select the UPDATE button to save the answers provided.

Note 1: Suppliers will not be expected to answer all the questions in one go, but may answer them over a period of time. However, all mandatory questions and required fields will have to be completed PRIOR to submitting the final tender response.

Note 2 – Important: Select the UPDATE button after each answer has been completed. Remember to update the section before navigating away from the section to a new section.

4.2. SELECT A LOT

To move to the next step in the Tender submission phase, Click on the ‘Select Mini Comp Lot’ tab.

Select the relevant lot by clicking on it in the Select a Lot grid.

Select the Lot Line Details button. This will open and display a view only grid of all items that are linked to the lot. This information is available so the supplier can make a decision as to whether they wish to respond to the lot or not.
Select the (Close) button to close this form.

Should the supplier wish to respond to this Mini Competition Lot after having viewed the accompanying documents, select the ‘EXPRESS INTENT’ button.

Note: This action must be repeated for every Lot to which a supplier wishes to submit a response.

A message will display asking for confirmation that the supplier wishes to continue.

Select the ‘YES’ option to continue.

The following message will display. Select the OK button.

Note: If a supplier has previously expressed interest in a lot the following message will appear, the system will advise the supplier accordingly.
Click on ‘NHS SC LOT DOCUMENTS’ button to open a DMS screen where any NHS SC lot specific documents will be located.

Note: Refer to Section 4 for instruction on how this is done.

Click on ‘SUPPLIER LOT DOCUMENTS’ button to open a DMS screen where suppliers can upload lot specific response documentation.

Note: Refer to Section 4 for instruction on how this is done.

### 4.3. LOT LINE DETAIL

Select the ‘LOT LINE DETAIL’ tab at the top of the screen, which is the next step in the mini competition response process. This tab displays a grid listing the items or products that the NHS SC has put to market on the mini competition lot. The supplier is required to complete the fields for pricing, quantities etc.
Important Note: All YELLOW fields on this grid are mandatory fields to which the supplier must provide an answer. In the example provided below note that the Cross Dock price field is yellow.

1. Select the item to which a response must be captured by clicking on it in the grid.

2. The static information for the selected item, like Item Code and Item Description, will remain displayed in the maintenance section of the tab (top section) as long as the item is selected. This makes it possible for the supplier to know what item is being responded to, irrespective of where in the grid the supplier is.

3. The supplier is able to scroll backwards and forwards through the grid by making use of the scroll bar provided.

4. Data can be inserted into cells within the grid by DOUBLE clicking on the cell.

   In some cases, where a predefined set of answers is provided from which the supplier may select, when double clicking on a cell, a drop down arrow will display next to the field.

   Select the button. The lookup form for the select field will display.
To locate the record that is applicable to the item, a filter needs to be applied. Hover over the Short Description column heading with the computer mouse. A lookup arrow will display.

Click on the arrow to open the filter menu option. Type the value of the unit of measure that is applicable for this item. The grid of the lookup form will refresh to display only the values that contain this filtered selection. Select the record from the grid and the click on the SELECT FROM LIST button to return the select to the grid field.

Note: There may be several price fields displayed in the Lot Line Detail grid for the selected lot. The price field on which the mini competition lot will be evaluated will always be indicated as such in the column label of the price field. e.g. Stock Price (Used for award decision).

Select the UPDATE button regularly while making changes to line items to ensure that all the changes are saved.
4.4. ALTERNATIVE RESPONSES

In some cases, the NHS SC buyer may allow the supplier to capture alternative responses to items/products. This can be allowed per LOT. Therefore in one complete mini competition to which several lots are linked, there may be only one lot that allows alternative responses, or none of the lots could be set to allow alternative responses.

The supplier will know whether or not alternative responses have been allowed on a lot by the presence of the Alternative Responses and Delete Alternative Response buttons on the grid section of the Lot Line Detail tab for the selected Mini Competition.

After selecting the item for which an alternative can be created, select the Alternative Response button. A message will display asking if the supplier wishes to continue. Select the Yes option.
A message will display confirming the alternative to the selected item has been added. Select the OK button.

The alternative item will carry the same item number and description as the item from which it was created. The supplier will know it is an alternative to the original offer as the alternative item will carry an offer code of OFFER2.

To delete an alternative offer, select the relevant alternative item and then select the Delete Alternative Response button. A message will display asking if the supplier wishes to continue. Select the Yes option.

A message will display confirming the alternative to the select item has been added. Select the OK button.

**4.5. FILTERED UPDATE**

For fields where there is a common answer across all items within a lot, there is an option to complete a filtered update.

The Filtered Update function can only be used once a filter has been applied to select the records to which a particular value must be applied across all items.

In the example provided below, the Country of Origin of the original offer and all its alternative offers needs to be updated to the same value of ‘UK’.
Click on the arrow which appears at the right hand end of the column header to which the filter must be applied. This will open a menu selection. Go to Filter option and type the value in the field on which to filter the selection. In the example provided above, the filter applied is that of item code 1467.

The grid will narrow the selection in the grid to return only the data that is applicable to the filter applied.

On the column that contains the fields that need to be updated, click on the arrow which appears at the right hand end of the column header. This will open a menu selection. Go to the Update option, and then across to the Update field. Input the value that you would like the fields of the selected column updated to.
Click away from the Update field and the column heading label will be highlighted in RED. This indicates that there is filtered, amended data waiting to be Updated.

Select the Filtered Update button to save the requested change to all the filtered items.

A message will display asking if the supplier wishes to continue. Select the Yes option.

A message will display confirming the changed data has been saved successfully. Select the OK button.
The data has been updated for the entire filtered list for that column. Lines not included in the filter will not be affected.

Note: The other Update functions on the column menu options work in a similar fashion. The names of the Update menu options clearly define what each update function is for.

- Add will add the value that is inputted into the update field to the value already present in the filtered field.
- Subtract will subtract the value that is inputted into the update field from the value already present in the filtered field.
- Multiply will multiply the value in the filtered field by the value inputted in the update field.
- Divide will divide the value in the filtered field by the value inputted in the update field.

Once all relevant records have been added, and all changes have been UPDATED, the supplier can progress to the next step in the mini competition submission process.
4.6. LOT EVALUATION

Select the ‘Lot Evaluation’ tab at the top of the screen, which is the next step in the mini competition response process. This tab displays an expandable list on the left hand side of the tab, which is referred to as the tree view, and list of questions that are displayed when an Evaluation Criteria section is selected.

Initially the Tree View will open with the folders closed. **Select on the top folder first by clicking on it.**

Then expand the Evaluation Criteria folder by clicking on the (arrow) next to the folder.

The selected folder will expand. The expanded folder will be indicated by the arrow which has now changed to a black arrow.

Click on an Evaluation Criteria section to display its linked questions in the right hand side of the tab.

**Note:** Steps 1 and 2 above must be repeated every time this tab is selected.

Read each of the questions carefully. The scroll bar on the right of the questions (if one is present) can be used to scroll up and down through the list.
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<td></td>
<td>Complete the response to the question in the field provided by making a selection from the list that is provided where a lookup function is present in the answer field.</td>
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<td></td>
<td>Select the UPDATE button to save the answers provided.</td>
</tr>
<tr>
<td></td>
<td><strong>Note 1:</strong> Suppliers will not be expected to answer all the questions in one go, but may answer them over a period of time. However, all mandatory questions and required fields will have to be completed PRIOR to submitting the final tender response.</td>
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<tr>
<td></td>
<td><strong>Note 2 – Important:</strong> Select the UPDATE button after each answer has been completed. Remember to update the section before navigating away from the section to a new section.</td>
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### 4.7 LOT QUESTIONNAIRES

Select the ‘Lot Questionnaires’ tab at the top of the screen, which is the next step in the mini competition response process. This tab displays an expandable list on the left hand side of the tab, which is referred to as the tree view, and a list of questions that are displayed when the Lot Questionnaire section is selected.
Initially the Tree View will open with the folders closed. **Select on the top folder first by clicking on it.**

Then expand the Lot Questionnaire folder by clicking on the (arrow) next to the folder.

The selected folder will expand. The expanded folder will be indicated by the arrow which has now changed to a black arrow.

Click on an Lot Questionnaire section to display its linked questions in the right hand side of the tab.

**Note:** Steps 1 and 2 above must be repeated every time this tab is selected.

Read each of the questions carefully. The scroll bar on the right of the questions (if one is present) can be used to scroll up and down through the list of questions.

Complete the response to the question in the field provided by making a selection from the list that is provided where a lookup function is present in the answer field.

Select the UPDATE button to save the answers provided.
Note 1: Suppliers will not be expected to answer all the questions in one go, but may answer them over a period of time. However, all mandatory questions and required fields will have to be completed PRIOR to submitting the final tender response.

Note 2 – Important: Select the UPDATE button after each answer has been completed. Remember to update the section before navigating away from the section to a new section.

4.8. SUBMIT RESPONSE

Once all of the preceding steps have been completed, the last step in the process is to submit the mini competition response.

Select the Submit Individual Lot Response(s) tab.

Select the relevant lot from the Submit Individual Lot Response(s) Grid.

Note: If responding to more than one lot, each lot must be submitted individually.

Select the TERMS & CONDITIONS button. A popup screen will display detailing the Terms & Conditions that must be accepted prior to the submission of the Lot response. Review details carefully, and select the Accept Terms & Conditions button.
A message will display asking if the supplier wished to continue. Select the Yes option.

A message will display confirming the changed data has been saved successfully. Select the OK button.

Select the button to close the Terms & Conditions screen.

Select the SUBMIT RESPONSE TO SELECTED LOT button.

A message will display asking if the supplier wished to continue. Select the Yes option.

If for some reason the supplier has forgotten to accept the Terms & Conditions a message will display a warning accordingly.
Select the OK button and then go to the Terms & Conditions and accept them.

If there are mandatory fields that have not been completed in the submission process, on selection of the Submit button the supplier will receive a warning to this effect and will not be able to submit a response.

If all mandatory fields have been completed, and at least one mandatory price field on one item, the supplier submission will be allowed and a message will display confirming that the response has been submitted. Select the OK button.

In the example message provided below, the lot has been successfully submitted although the supplier is being informed that some items do not have prices captured against them. Select the OK button.

In this example all the mandatory questions have been completed and prices have been captured against all the items. Select the OK button.

Note: Suppliers can submit corrections and amendments as frequently as they like until the closing date and time of the Mini Competition.

Once a Lot response has been successfully submitted the supplier can view the Supplier Submission Report.
The report can be exported and saved in the Microsoft Excel .XLS format.

The supplier has successfully completed the submission of one lot.

The process detailed above is followed for the response to and submission of responses for each individual lot. The submission date and time of each lot will be recorded against the lot in the grid of the Select Mini Comp Lot tab.

**IMPORTANT** Note: Once the Mini Competition has closed, it will no longer be visible to the supplier. It is highly recommended that after submitting the last lot
the supplier exports the submission report to be used for future reference for when the mini competition is no longer available.
## 5. REVISION CHART

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