

# in-tend

## In-tend Contracts Database System

# Frequently Asked Questions & User Guide

In-Tend Colleague User Guide & FAQs – V3 02/01/2024

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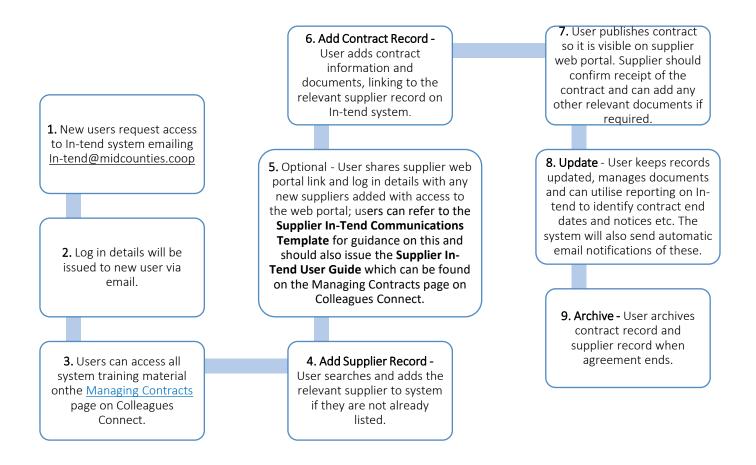
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#### 1. An Introduction to In-Tend and the User Journey Process Map

In-tend is a contracts database which the Society introduced in 2021 to house all commercial contracts in a central location. The key aim of the system is to improve visibility and management of the Society's contracts.

The system also allows our suppliers to have access to their contract and any related documents, via a secure web portal. The benefit of this is that both Midcounties and the supplier have access to the same, latest information in real time.

Below is a visual representation of how users interact with the In-tend contracts database system from the beginning to end of a contract:



It is important to note that any new contracts which are introduced from the beginning of December 2021 must follow the new Contract Management Process **before** they are uploaded to the In-tend system. This can be found on the <u>Managing Contracts</u> page on Colleagues Connect.

#### 2. <u>FAQs</u>

#### 1. General Information, Access, and Support

#### 1.1 What is In-tend?

In-tend is a contracts database which the Society introduced in 2021 house all commercial contracts in a central location. The key aim of the system is to improve visibility of the Society's contracts and to enable Contract Managers and stakeholders' better access to key contractual information.

The system also allows our suppliers to have access to their contract and any related documents (e.g. signed Ethical Code of Conduct/Modern Slavery Statement/Schedule of Works/accreditations/insurances etc) via a secure web portal. The benefit of this is that both Midcounties and the supplier have access to the same, latest information in real time.

#### 1.2 Who uses In-tend?

In-tend is predominantly used by Contract Managers across the Society. The criteria below also apply (colleagues can meet 1 or more of the below) but this is not an exhaustive list:

- Colleagues who are responsible for the administration of contracts
- Colleagues who are involved in negotiation and drafting of contracts
- Colleagues who are involved in managing relationships with supplier/s
- Colleagues who require oversight of the contracts (or groups of contracts) for their Trading Group/Support Service area/department

If you are not sure if you or a colleague should have access to the system, please email <u>In-</u><u>tend@midcounties.coop</u>

#### 1.3 How do I access the system?

Midcounties colleagues access the system via the following link: <u>https://in-tendorganiser.co.uk/yourcoop/aspx/itlogin.aspx</u>

Suppliers access the supplier web portal via the following link: <u>https://in-tendhost.co.uk/yourcoop/aspx/Home</u>

#### 1.4 Do I need to be on VPN to access In-tend?

No, you don't need to be on VPN but you will need to use two factor authentication.

#### 1.5 How do I request a log in for the system?

Colleagues can request access by emailing <u>In-tend@midcounties.coop</u>

#### 1.6 How do I log in?

We have now implemented Single Sign On (SSO) with In-tend, meaning that it is automatically linked to your Active Directory (AD) account.

#### Your Username is your Society email address

Your Password is your AD Password (that you use to log into your system as normal)

To reset your password, please follow the normal process via FastPass.

#### 1.7 What happens with log ins for movers and leavers?

The leavers forms on Service Now include access to In-tend and when a colleague leaves the Society their AD is disabled which means their In-tend access will be automatically removed. If a colleague is moving to another role please email <u>In-tend@midcounties.coop</u> to amend their access so they have visibility of the correct contracts.

#### 1.8 What support is available?

There is a wealth of training and guidance material available on the Managing Contracts page on Colleagues Connect to support you with using the In-tend contracts database system, including:

- <u>In-tend User Journey Process Map</u> (in this document)
- <u>FAQs</u> (in this document)
- <u>User Guide</u> (in this document)
- Bitesize training videos
- Supplier User Guide
- Supplier Communications Template

Please refer to the guidance on the <u>Managing Contracts</u> page on Colleagues Connect in the first instance where you should find all the information you need. You also can find this page by clicking on 'How To' and then 'Managing Contracts' from the menu at the top of Colleagues Connect.

If you have any issues or need any further training please email In-tend@midcounties.coop

If you have any queries relating to the specifics or legalities of a contract, please contact the Legal team by emailing Legal@midcounties.coop.

#### 1.9 Can I request a training session?

Yes, nominated colleagues will have had training sessions when the system was launched. If you were not involved in these, or simply need a refresher, the team will be happy to assist and run another session for you. Please email <u>In-tend@midcounties.coop</u> to arrange.

#### 1.10 How do I use the In-tend system?

Please refer to the <u>User Journey Process Map</u> for a visual representation of how users interact with the In-tend contracts database system from the beginning to end of a contract.

#### 2. Navigation

#### 2.1 How do I search in the system?

A useful tip when searching for anything is to insert an underscore in the *Search* box, and then click the *Search* button, this will bring up everything you have access to in the system. To see the guidance on how to search for a supplier <u>click here</u>, to see the guidance on how to search for a contract <u>click here</u>.

#### 2.2 Why are some areas of the system highlighted yellow?

Any areas which are highlighted yellow are mandatory fields which must be filled out by the user.

#### 3. Uploading Supplier Information to In-tend

#### 3.1 What should I call the supplier on In-tend?

This should match their legal entity. This can often be found on the contract, alternatively you can email <u>Legal@midcounties.coop</u> to check the correct name.

### 3.2 The supplier I am uploading is referred to by multiple names, or the legal entity does not reflect what we refer to the supplier as, what should I call it?

You should still insert the supplier's legal entity name as a priority. If it is useful for searching, you can also add any other names into the mandatory name field by splitting these out with a forward slash. For example – Montague Skyes Limited / PROFIT / Anti Dolus.

### 3.3 For the contract I am uploading, Midcounties are the supplier, how do I add the contract correctly?

You should attach the contract to 'The Midcounties Co-operative Limited' which is already set up as a supplier in the system for you. You should also remember to pick "For use where the other party is not a supplier" title in the 'Classification' tab.

#### 3.4 Can the supplier see notes I am writing about them on the system?

The supplier will not be able to see any notes that you insert about an individual or the contract. <u>Click here</u> to see what the supplier can see on their web portal, and if you're unsure it's always best to check by emailing <u>In-tend@midcounties.coop</u>.

### 3.5 The supplier is visible on the Supplier page, but I am not able to search for the supplier when I am adding a contract, why?

It's likely you have forgotten to 'Accept' the supplier, you can revisit the guidance on how to do this <u>here</u>.

#### 3.6 Why can't I save the supplier record?

If at the end of completing all of the tabs, you click *OK* and the system keeps taking you back to one of the tabs and not letting you save, this means you have not filled in the mandatory fields correctly. You will need to double check the information you've inserted, amend appropriately and retry.

Another reason may be that you need to enable pop ups on your web browser.

#### 4. Uploading Contract Information to In-tend

#### 4.1 What contracts should be uploaded on the In-tend system?

The In-tend contracts database should be used to store all types of commercial contracts (excluding property leases, utilities contracts which are stored on the Affinity system, and any one off, low value agreements – e.g. webinars, training sessions). You can upload contracts or agreements where The Midcounties Co-operative acts as the supplier to customers/corporate entities, or where we have partnership agreements. If you are not certain whether a contract should be uploaded, please seek advice by emailing <u>In-tend@midcounties.coop</u>.

#### 4.2 What types of documents should I upload to In-tend along with the actual contract?

The In-tend contracts database can be used to house a variety of documents (there are no restrictions on file types) relating to either the supplier and/or the contract. Users are encouraged to upload as much as possible so that the Society has thorough record. This can include, but is not limited to:

- Contract (signed by both parties and often negotiated), T&Cs (usually set by the supplier, signed by us and are non-negotiable e.g. Microsoft, Facebook etc), Schedule of Works, Specifications etc. (where a contract is not present, any email trails with outline agreements should be uploaded in its place)
- Contract Management Process documents (Contracts Business Case, Summary of Key Terms doc, Risk Assessments, Finance Governance approval etc.)
- Tender documentation any relevant documents from the tender or selection process (Questionnaire, Pricing Template, analysis etc.)
- Supplier due diligence (references, credit checks, Data Security Questionnaire etc.)
- Signed Ethical Codes of Conduct
- Any other related policies (IT/Data Protection etc.)
- Accreditations
- Health and Safety documents
- Insurances (this information will be uploaded and managed by the Insurance team)

#### - Account Management documents

Please be mindful when uploading documents, considering whether or not they contain internal confidential information and if they should be visible to the supplier. Users can follow the guidance on <u>adding documents</u> in the User Guide.

#### 4.3 Can I upload any type of file to In-tend?

Yes, there are no restrictions on file types.

#### 4.4 How do I edit documents on In-tend?

You can add, amend and archive documents by navigating to the **Document Storage** area.

### 4.5 I don't have a physical/formal contract to upload, or I have an incomplete contract with partial information, should I still upload this?

Yes, you should still add a contract record onto the system so the Society has sight of the agreement even where you don't have a copy of the contract. It is important to upload as much information as possible.

The Society recognises that there may be historic, incomplete contracts which don't necessarily align with our current standard and this is accepted. It's important to gain visibility of these so that any gaps can be addressed, and high-risk areas can be brought to our Legal team's attention. In-tend will allow us, for the first time, to have visibility of where this might be the case so it's really important that you upload all agreements for your area. Where a copy of the contract is not present, any email trails with outline agreements should be uploaded in its place or any other relevant material. If you require support or you are not sure how to upload a contract record where you might be missing the document or have incomplete information, please email In-tend@midcounties.coop.

#### 4.6 Do I need to upload an agreement where we are 'piggy-backing' on a TCG contract?

Yes, even where The Co-op Group are responsible for the main contract, The Midcounties Co-operative will usually have an agreement resulting from this in the form of a sub-contract or a letter and this should be uploaded to In-tend.

#### 4.7 What should I call the contract on In-tend?

The contract name should reflect the goods/services bought or supplied. Best practice is to keep the name concise and then insert as much detail as possible in the description to help other users to understand the contract. The system does not allow for duplicate names of contracts so you may need to insert the supplier name at the end of the contract name as a differentiator.

#### 4.8 Will the system send reminders automatically when a contract is due to expire?

Yes, as long as you insert the expiry date and set up the contract correctly, the system will send emails to both you (and any other users you might wish to nominate) and the supplier, to

remind you of when the contract is due to end. You should make sure that you are selected in the 'Users' tab when editing the contract record to ensure you receive notifications.

You can also use the <u>reports</u> in the system at any time to see when a contract is expiring or for reminders of when you will need to serve notice.

### 4.9 I have a rolling contract, what do I enter in the end date and expiry fields when uploading the contract information?

To minimise risk the Society needs to ensure that contract records are reviewed on a regular basis. To support this, an end date should be inserted for ALL contract records (except for Travel Agency Agreements). For any records where you do not have/know the end date or where it is a rolling contract, you will need to ensure a date is inserted for review within 2 years.

#### 4.10 I don't know the start date of the contract, what should I insert?

If you know the end date and duration of the contract you should work backwards to calculate the start date. If you do not have this information please contact the Legal team for advice by emailing Legal@midcounties.coop.

#### 4.11 What should I insert as the value of the contract?

You need to insert the lifetime value of the contract (excluding VAT) and select the relevant currency. You should not insert a pound sign or any commas. In some cases, the value may not be straightforward (e.g. fluctuating volumes) so you should make a well-educated assumption and then you can also insert any useful additional notes to explain any anomalies.

In some instances you may be uploading commission based contracts where the supplier makes payments to us. You should still insert an estimated value here and add as much detail in the notes as possible to explain.

#### 4.12 Why can't I save the contract record?

If at the end of completing all of the tabs, you click *Finish* and the system keeps taking you back to one of the tabs and not letting you save, this means you have not filled in the mandatory fields correctly. You will need to double check the information you've inserted, amend appropriately and retry.

If the system is taking you back to the 'Name' field repeatedly, it is likely the name you are entering is a duplicate of a contract already in the system. The system does not allow for duplicate names of contracts so you may need to insert the supplier name at the end of the contract name as a differentiator.

### 4.13 I have added a contract onto In-tend but I cannot see this listed on the Contracts Administration page, where can I find it?

Where a contract is associated with another, you will need to change the data filter to 'Show All' if your contract is not appearing in the list. If you are still not able to see your contract please email <u>In-tend@midcounties.coop</u>.

### 4.14 I have signed a new contract with an existing supplier/I have an addendum to the current contract. Do I need to archive the contract record and start a new one?

You do not need to archive the contract record if you have signed a new one with the same supplier and are simply extending the same contract, or if you have an addendum. In this instance you need to just add a contract extension to the record, amend any necessary information in the record, then upload a copy of the new signed contract/addendum and archive the old document. You can see the guidance on how to do this <u>here</u>. However, if any contract terms have changed then it is best to archive the old record and start a new one entirely.

#### 4.15 Do Personal Travel Agents and Locum Pharmacist contracts need to be uploaded to Intend?

Yes, these agreements should be uploaded onto In-tend. To avoid the administrative burden of setting up each individual with a supplier record, the following suppliers have been set up to attach these agreements to for ease:

- Personal Travel Agents Co-op Travel
- Locum Pharmacists Co-op Pharmacy

If you have any queries regarding how to attach contracts to these, please email <u>In-tend@midcounties.coop</u>.

#### 4.16 Do I need to set an expiry date for a signed Ethical Code of Conduct?

Yes, our Society standard is to obtain an updated signed copy of our Ethical Code of Conduct from suppliers every 2 years. You should set a reminder for expiry when uploading this as a document in the storage area to remind you and the supplier (if they have been given access to this and the web portal).

#### 5. What Do Users Have Access To?

#### 5.1 Can all users see all contracts in the system?

No, user access is restricted so that users can only see contracts which are relevant for their department. If you think you have incorrect access, please email <u>In-tend@midcounties.coop</u>.

### 5.2 I can see references to tendering in the system and on the supplier web portal, are we using this functionality?

The In-tend system has extensive functionality for tendering and supplier management, but we are not using this at this moment in time. We are focussing first on uploading our contracts

for visibility and enabling our colleagues to use the system confidently. The other elements of the system will be considered in the future.

#### 6. Archiving

#### 6.1 When should I archive a supplier and contract?

The contract record and supplier record should be archived when the agreement ends. The archiving process ensures that the contract is no longer visible in the current contracts list but the information still remains on the system for audit trail purposes. You should take care not to archive a supplier record if there are other agreements still in place, in this instance you will just need to archive your contract record.

#### 6.2 How can I view archived records?

To view previously archived contracts you can follow these steps.

#### 7. Supplier Web Portal

#### 7.1 What suppliers are given access to the web portal to view contracts?

Only our existing and approved suppliers are given access to the web portal. When they sign in, they can only see the contracts which are relevant and have been assigned to them. Supplier access is not mandatory and contracts can be set up without this, but it is encouraged for maximum visibility.

If suppliers have any issues with their sign in details or access, they can use the 'forgotten password' function on the web portal or email you to reset this in the 'Individuals' tab on the Supplier Record.

Any new, prospective suppliers should register an interest with the Society by completing the 'Become a Supplier' form on our website - <u>https://www.midcounties.coop/legal/corporate-info/become-a-supplier/</u>. This allows the Procurement team to capture the information needed to share with the relevant colleagues across the Society in the first instance for consideration. This information is not currently uploaded onto In-tend to ensure that only our current suppliers are visible.

### 7.2 I have issued a supplier their log in detail to the supplier web portal, they now can't access the system, what should I do?

They can use the 'forgotten password' function on the web portal or email you to reset this in the Individuals tab on the supplier record.

### 7.3 The supplier can see tender related information on the web portal, does this mean we will be tendering electronically from now on?

Please advise the supplier that they should ignore these elements of the web portal at present, this is explained in the supplier guidance. Unfortunately, we don't have the ability to hide them.

The In-tend system has extensive functionality for tendering and supplier management, but we are not using this at this moment in time. We are focussing first on uploading our contracts for visibility and enabling our colleagues to use the system confidently. The other elements of the system will be considered in the future.

### 7.4 When a supplier is archived at the end of a contract, do they lose access to the web portal?

Yes, once you have archived them you don't need to take any further action as this automatically de-register them from the web portal.

#### 7.5 Why can't I edit a document a supplier has uploaded via their web portal?

You may need to navigate to the Supplier Document Storage area, rather than the Contract Document storage area to find the document and edit it by clicking on *Details*.

#### 3. User Guide

This section of the document is a detailed step by step guide for using the In-tend contracts database system. This is broken down into sections so you can navigate to what you need to find. You can also refer to the bitesize training videos on Colleagues Connect if you prefer this method of learning.

#### 1. Signing in and out of the system

#### Signing in:

Colleagues can request access to In-tend by emailing <u>In-tend@midcounties.coop</u>. The system can then be accessed via the following link: <u>https://in-tendorganiser.co.uk/yourcoop/aspx/itlogin.aspx</u>

In-tend is integrated with Single Sign On (SSO), meaning that it is automatically linked to your Active Directory (AD) account. To log in:

- Your Username is your Society email address
- Your Password is your AD Password (that you use to log into your system as normal)

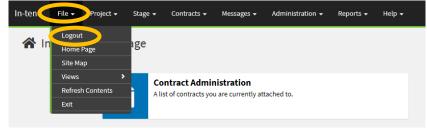
If this log in screen appears, please select the small window icon to bring up our Midcounties log in page:

Sign in to start you	ir session
User name	
Password	(

To reset your password please follow the normal process via FastPass.

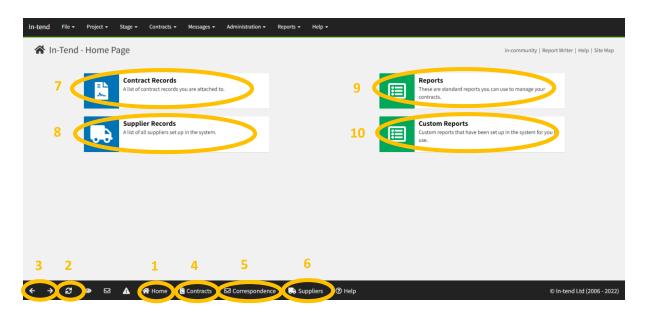
#### Signing out:

You can sign out of the system by clicking *File* in the top left-hand side of the screen and then *Logout*:



#### 2. Navigating the system

The homepage is designed to give you access to the key areas of the system you will use. Please see the below highlighted and numbered areas for an overview of the navigation functions:



Let's start with the main banner across the bottom of the screen:

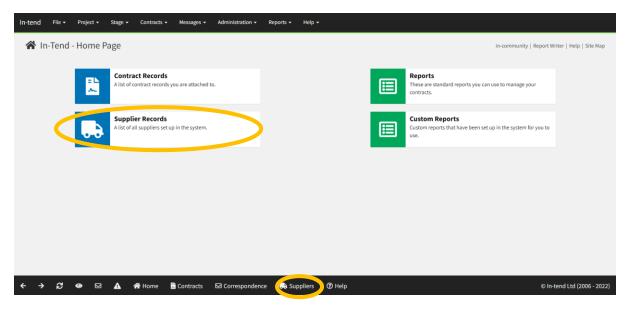
- 1. This *Home* button will bring you back to the above homepage if you click this at any point when you are in the system.
- 2. This will refresh the page you are on.
- 3. These arrows allow you to navigate back and forward to the pages you have been on in the system.
- 4. This *Contracts* button will take you to the list of contract records that are visible to you in the system (you can only see contracts you have been assigned to).
- 5. This *Correspondence* button will show any correspondence you have received from your suppliers who are using the web portal.
- 6. This *Supplier* button will take you to the list of existing supplier records in the system (unlike contract records, you will be able to see all suppliers).

Now let's look at the homepage buttons in the middle of the screen:

- 7. This *Contracts Records* button will take you to the same area as number 4, so if you click here, you will see a list of contract records that are visible to you in the system.
- 8. This *Supplier Records* button will take you to the same area as number 6, so if you click here you will see all supplier records in the system.
- 9. This *Reports* button will take you to a list of standard reports which are available within the In-tend system.
- 10. This *Custom Reports* button is where you can access useful reports that have been set up for you to use. This includes contracts which are due to expire in the next 12 months.

#### 3. Searching for a supplier record

To search for a supplier, you need to click on *Supplier Records* on your homepage or the *Supplier* button on the banner at the bottom of your screen:



This will bring up the full list of supplier records in the system. All users have access to all suppliers. You can use the Data Filter bar highlighted below to search for a specific supplier you are looking for by filling in the relevant boxes and clicking the *Search* button:

earch	• Supplier	•	Search Clear Search	Advanced	Options Supplier Summary
earch	Supplier		Great Search	Autoriceu	Supplier Contacts
upplier†#	Pullding Address	Postal da d		Registered Classification	Add Supplier
appuer 1-	Co-operative House	CV346DA	07437015053	16/07/2021	Edit Supplier
est Supplier 2	Hexagon Business Centre	OX28 4BN	01993 773372	25/05/2021	Remove Supplier
est Supplier 3	Midcounties Co-op	CV34 6DA		25/05/2021	Status
est Supplier 4	Test	CV346DA		25/05/2021	Accept Supplier
est Supplier 5	1 Test Road	TEST1 3LW		25/05/2021	Reject Supplier
est Supplier 6	In-Tend House	S60 1DX		27/04/2021 H	Request More Info
howing 1 to 6 of 6					Change Status Wizard
					Contracts
					Reports
					Actions
					Document Storage
					Close

A useful tip if you want to search for all suppliers, is to insert an underscore in the *Search* box, and then click the *Search* button. Another useful function here is that you can export this information into a printable, Excel or CSV file by clicking on the buttons at the top right-hand side of the screen and following the steps to download.

You can double click into the supplier summary to see the record information. If you wish to access and amend the supplier record, please refer to the guidance on this by <u>clicking here</u>.

#### 4. Adding a supplier record

Before you can upload a contract record on the In-tend system, you need to check that the relevant supplier is listed. This is because the system works in such a way, where any contract uploaded needs to be attached to a supplier. You can follow <u>these steps</u> to check if the supplier is already set up in the system.

Where the supplier is not yet set up, you need to click on *Supplier Records* on your homepage or the *Supplier* button on the banner at the bottom of your screen:

In-ten	ıd	File 🗸	Proje	ect 🗸	Stage 🗸	Contracts •	Messages 🗸	Administration -	Reports 👻	Help 👻		
*	In-	Tend	- Ho	me P	age						in-community   Report W	riter   Help   Site Map
				=L ~-		ract Records	s you are attached	to.			Reports These are standard reports you can use to manage your contracts.	
		(	ſ.	<b>.</b>		lier Records fall suppliers se	t up in the system.	$\supset$			Custom Reports Custom reports that have been set up in the system for you to use.	
÷	→	3	0		▲	希 Home	🖹 Contracts	Corresponden	ce 🕞 Su	ppliers ⑦ Help	© In-	tend Ltd (2006 - 2022)

This will bring up the full list of suppliers in the system. Next, you need to click the *Add Supplier* button on the right-hand side:

Filter: Show All	n v Supplier	▼ Search	Clear Search Advanced	Options Suppler Summary
olier↑≣	Building Address	Postal Code Phone	Registered Classification	Add Supplier
Supplier 1	Co-operative House	CV346DA	16/07/2021	Remove Supplier
Supplier 2	Hexagon Business Centre	OX28 4BN	25/05/2021	
Supplier 3	Midcounties Co-op	CV34 6DA	25/05/2021	Status
Supplier 4	Test	CV346DA	25/05/2021	Accept Supplier
Supplier 5	1 Test Road	TEST1 3LW	25/05/2021	Reject Supplier
Supplier 6	In-Tend House	S60 1DX	27/04/2021 H	Request More Info
ving 1 to 6 of 6				Change Status Wizard
				Contracts
				Reports
				Actions
				Document Storage
				Close

This will bring up a pop-up window for you to complete. Please note the multiple tabs across the top of the screen that you will need to work through:

Create New Sup	plier - Microsoft Edge													- 0	) ×
A https://tra	aining.in-tend.co.uk/y	ourcoop/organis	er/aspx/ITForms	_SupplierCusto	omer.aspx?Actio	n=NEWSUP	PLIER&Mode=Add	&SK=5d94b	f51-66ce-410c-b7c	-e3d2edba48e5					
	eate New Su	pplier													
Address	Contact Details	Individuals	Company	Banking	Insurance	Other	Accreditation	Notes	Classification	Status History	Snapshots				
Address															^

Any field which is highlighted in yellow is mandatory and must be completed. Best practice is to insert as much information as possible in any field, regardless of whether it is mandatory. You should now work through each of the tabs, remembering to scroll to the bottom of each one as you complete the fields.

Address Tab – As a minimum you need to complete the name (this should match the supplier's legal entity), address, postcode and country fields. Please leave the 'Archived' box unticked as you scroll down. Finally, select the regions associated with the supplier. Then click on the next tab at the top of the window.

**Contact Details** – As a minimum you need to insert the supplier's telephone and an email address and select if the supplier will access the web portal. Then click on the next tab at the top of the window.

**Individuals** – Setting up an individual means that you are giving the supplier access to the secure web portal. Supplier access is not mandatory and contracts can be set up without this, but it is encouraged for maximum visibility. To do this, click the *Add Individual* button on the right-hand side, this will bring up another pop-up window for you to complete. This section is important as this is the information that you will need to share with the supplier so they can access web portal. Again, you need to note the multiple tabs for this:



- Details You need to fill in the first name and the surname of the person you are giving access to, along with their email address (usually the Account Manager). Then please click on the next tab at the top of the window.
- Website Information Please select the 'Allowed website access' box. This will then
  enable you to enter a temporary password for the individual. Remember these details
  so that you can inform the supplier once the set-up process is complete. Users can refer
  to the Supplier In-Tend Communications Template for guidance on this and should also
  issue the Supplier In-Tend User Guide to the supplier. The supplier will need to change
  their password when they first sign into the web portal. Moving forward, the supplier
  can use the 'forgotten password' function on the web portal or you can advise them to
  contact In-tend@midcounties.coop if they have any access issues. Then please click on
  the next tab at the top of the window.
- Notes This is not mandatory and the he supplier will not be able to see these.
- Supplier Summary Again, this is not mandatory, but you can insert any useful notes here also and choose whether to show these on the supplier summary page.
- Once you've completed these tabs, you can click *OK* on this pop-up window.

This will take you back to the Individuals tab where you should now see a row has been added. You can add as many individuals as you need to and you can also edit their records or remove them by highlighting the relevant row and then using the menu functions on the right hand side of this tab. Once you have finished please click on the next tab at the top of the window.

**Company** – There are no mandatory fields to complete here, but if you have access to this information it is useful to populate wherever possible. Then please click on the next tab at the top of the window.

**Banking** – You do not need to complete this tab as all of this information is held in our IFS system.

**Insurance** – You do not need to complete this tab as all of this information is held by our Insurance team.

**Other** – There are no mandatory fields to complete here, but if you have access to this information it is useful to populate wherever possible. Then please click on the next tab at the top of the window.

**Accreditation** – There are no mandatory fields to complete here, but if you have access to this information it is useful to populate wherever possible. Then please click on the next tab at the top of the window.

**Notes** – There are no mandatory fields to complete here, but you can use this section for any useful notes about the supplier. Then please click on the next tab at the top of the window.

**Classification** – Please click on the *Manage* button on the right-hand side, this will open up the below pop-up window. You will need to search for the right classification for this supplier based on the goods or services they provide (this can be more than one). You can use the search bar highlighted below to search for the classification you are looking for, by filling in the boxes you need and clicking the *Search* button. A useful tip if you want to search for all classifications in the system, is to insert an underscore in the *Search* box, and then click the *Search* button, you can then scroll through them all. If you are unable to find the right classification for the supplier, please email In-tend@midcounties.coop

Company Category - Microsoft E								
A https://training.in-tend.co	o.uk/yourcoop/organiser/aspx/ITForm	ns_ClassificationManage.aspx?Act	ion=SUPPLIERCLASSIFIC	CATION&KeyField=-1	8:SK=2fd94076-08b4-4d	e2-beea-bf65542	d1d85	
民 Company Ca	ategory							Ð
Classification								
Selected Classification List	t							^
								- 11
Category Code	Sub Category Code	Title				Co	re Classification	
							Remove	
								- 10
								J.
et and search	- to add a classification, please us	e the search options, select the	codes you require and	d then select Insert				
et and a search	- to add a classification, please us	e the search options, select the	codes you require and	d then select Insert				
A second second	- to add a classification, please uso			d then select Insert Clear Search	Advanced		insert	
					Advanced		Insert	
-	in 🗸 Title	~			Advanced		Insert	
- Category Code	in v Title Sub Category Code	✓	Search		Advanced		Insert	
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- Category Code	in v Title Sub Category Code	✓	Search		Advanced		Insert	
Category Code Property	in V Title Sub Category Code H&S	✓ Title1∓ 365 - Incident Reporting Syst	Search		Advanced		Insert	
Category Code Property Finance	in V Title Sub Category Code H&S	✓ Title [ 365 - Incident Reporting Syst Accountants	Search		Advanced		insert	
Category Code Property Finance	in V Title Sub Category Code H&S	✓ Title [ 365 - Incident Reporting Syst Accountants	Search		Advanced		insert	-
Category Code Property Finance	in V Title Sub Category Code H&S	✓ Title [ 365 - Incident Reporting Syst Accountants	Search		Advanced	OK	insert Cancel	

Once you have found the right classification (you can add more than one as appropriate), please tick the box next to the correct one to select it and then click the *Insert* button so that it appears at the top of the pop-up window in the box that was previously empty. In this instance, we have chosen and inserted Advertising under Marketing:

Company Ca	tegory			8
ssification				
ected Classification List				
Category Code	Sub Category Code	Title		Core Classification
Marketing	to add a classification, please use	Advertising the search options, select the codes you require and then select In	ısert	Remove
	to add a classification, please use		isert Advanced	Remove
ssification Field Search -	in v Title	e the search options, select the codes you require and then select Ir		
ssification Field Search - Category Code	in V Title Sub Category Code	the search options, select the codes you require and then select in Search Clear Search		
ssification Field Search - Category Code Property	in V Title Sub Category Code H&S	the search options, select the codes you require and then select in Search Clear Search Title 1= 365 - Incident Reporting System		
ssification Field Search - Category Code	in V Title Sub Category Code	the search options, select the codes you require and then select in Search Clear Search		

When complete, click *OK* at the bottom of this pop-up window. This will return you back to the original tabs you were working on and you will now see the classification you've chosen appear as below:

Cre	ate New Sup	oplier												
Address	Contact Details	Individuals	Company	Banking	Insurance	Other	Accreditation	Notes	Classification	Status History	Snapshots			
Select the cla	assification types yo	ou wish to be asso	ociated with th	his supplier										
Cate	gory Code		Sub	Category Co	de		Title							
O Mark	eting						Advertis	ing						>
														Mana
														Man
Select the co	mpany categories y	ou wish to be ass	ociated with t	this supplier										Man
Select the co Title		ou wish to be ass	ociated with t	his supplier										Man
Title			ociated with t	this supplier										Mani
Title Micro		mployees)	ociated with t	his supplier										Mana
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Title Micro Smal	Organisation (<10 E l Organisation (10-49	mployees) employees) vn (50-249 employe		this supplier										Mani
Title Micro Smal Mediu Large	o Organisation (<10 E l Organisation (10-49 um-sized Organisatio	mployees) employees) m (50-249 employe employees)	ees)	this supplier										Mana
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Title Micro Smal Medii Large Black	o Organisation (<10 E I Organisation (10-49 um-sized Organisatio o Organisation (250+ c and Minority Ethnic	mployees) employees) in (50-249 employe employees) Organisations (BM organisations (BM	ees) ÆE)	this supplier										Man

Then please click on the next tab at the top of the window.

**Status History** – You do not need to fill in anything on this tab, this provides an overview of any status changes which are made to the supplier in the future. Please click on the next tab at the top of the window

**Snapshots** – You do not need to fill in anything on this tab, this provides an audit trail of any edits which are made to the supplier in the future.

You will now need to click the *OK* button on the bottom right-hand side of the pop-up window. The system will prompt you to go back to the tabs if you have missed any mandatory information. If you have filled this in correctly, the system will take you back to the supplier screen where you should now see your new supplier listed.

**IMPORTANT FINAL STEP -** You will need to highlight the supplier you have just added and click the *Accept Supplier* button on the right-hand side as shown below:

Supplier [7]         Building Address         Postal Code         Phone         Registered         Classification         Supplier Conducts           Step Spiler 1         Co-operative House         CVAHDA         140/77021         Address         Address           Fett Supplier 2         Hexagon Ruiness Conducts         CVAHDA         2505/0021         Remore Supplier           Test Supplier 3         Malcounties Co-operative House         CVAHDA         2505/0021         Status           Test Supplier 4         Test         CVAHDA         2505/0021         Status           Test Supplier 3         Malcounties Co-operative House         CVAHDA         2505/0021         Status           Test Supplier 4         Test         CVAHDA         2505/0021         Status           Test Supplier 5         1 Test Road         TS11 JU         2505/0021         Accerd Supplier           Test Supplier 6         In Tend House         Status         2605/0021         Marcerd Supplier           Test Supplier 7         Co operative House         0/2480A         2007/2021         Marcerd Supplier	Suppler []         Duilding Address         Posch Code         Registered Cassification         Suppler CodeSit         Add Suppler           Test Suppler 1         Co-operative House         CV440A         100/7021         Address         Address           Test Suppler 2         Modeumtes Co-op         CV440A         250(50/201         Bannes Suppler         Bannes Suppler           Test Suppler 3         Modeumtes Co-op         CV440A         250(50/201         Status         Status           Test Suppler 4         Test         CV440A         250(50/201         Status         Address           Test Suppler 3         Modeumtes Co-op         CV440A         250(50/201         Status         Address           Test Suppler 4         Test Road         TEST 310/000         270(4/2021 H         Request NoreAdol         Address           Test Suppler 7         Co coperative House         CV440A         2407/002 H         Modeumtes         Contests           Showing 1 to 7 d 7         Status         Contests         Edenore         Contests         Address		in * Supplier	<ul> <li>Search</li> </ul>	fear Search Advanced	- Supplier Summary
upple?         building.Address         Poil and Code         Poil one         Explained         Code participation         Explained	upple?         Datiling Address         Point of Constructions         Point of Constructions         Engineration of Constructions         Engineration of Constructions         Enginerations         Enginant         Enginerations <t< th=""><th></th><th>m onther</th><th></th><th></th><th></th></t<>		m onther			
ist spipler 1         co-operative loade         QMA0         1007/021         Innex Spipler 2           ist spipler 2         Rogen huines Co-op         Q24 40A         2505/021         Salus           ist spipler 3         Modountis Co-op         Q24 40A         2505/021         Salus           ist spipler 4         Test         Q44 A0         2505/021         Salus           ist spipler 3         Ist Name         2505/021         Salus         Salus           ist spipler 4         Test Rod         C511 M0         2505/021 M         Salus         Salus           ist spipler 5         Ist Rod         Salus         Sal	ist spipler 1         co-operative foode         CV46A         160/07201         Innexe Sugaline           ist spipler 2         Hogon Buines Co-op         O24 40A         25050021         Status           ist spipler 3         Midcountis Co-op         CV44 60A         25050221         Status           ist spipler 4         Test         CV44 60A         25050221         Annow Sugaline           ist spipler 4         Ist RoAd         TEST 110A         250502021         Annow Sugaline           ist spipler 4         Ist RoAd         Status         Annow Sugaline         Annow Sugaline           ist spipler 5         Ist RoAd         Status         250670221 H         Reguest Nor Adm           ist spipler 6         Ist RoAd         Status         25067021         Reguest Nor Adm           ist spipler 7         Cooperative House         CALEAD         26077021         Marketing         Caleads           hower 1 to 7 07         Contexts         Contexts         Caleads         Caleads         Caleads	Supplier 17	Building Address	Postal Code Phone	Registered Classification	
ieta Sapplier 2         Magan Bause Sentre         026 48/4         2505/2021         Salus           ieta Sapplier 3         Madounties Co-op         024 60A         2505/2021         Salus           ieta Sapplier 4         Tet         024 60A         2505/2021         Salus           ieta Sapplier 4         Tet Road         561 DX         270/2021 H         Maching 1           ieta Sapplier 4         Tet Road         561 DX         270/2021 H         Biorder Maching 1           ieta Sapplier 5         Io Tend House         561 DX         270/2021 H         Maching 1         Biorder Maching 1           istory 10 of 70 <sup>+</sup> Cooperative House         561 DX         270/2021 H         Maching 1         Onege Sabau Haad           ishowing 116 7 d <sup>+</sup> Cooperative House         574 H         3607/2021 Maching 1         Gooperative House	interspiler2         Moagen BusiesCentre         0054 MA         25057021         Salus           feet Supplier3         Modumities Co-ope         0/04 GA         25057021         Salus           feet Supplier4         Tet         0/04 GA         25057021         Salus           feet Supplier5         1 Tet Moale         TST 31 W         25057021         Anone Supplier5           feet Supplier5         1 Tet Moale         560 DX         270 / 2021 H         Request Norm 60           feet Supplier5         1 Tet Moale         0 (24 GA         200770201         Marketing         Conspective House           feet Supplier5         1 Tet Moale         0 (24 GA         200770201         Marketing         Conspective House         Conspective Ho			CV346DA	16/07/2021	
Feet Supplier 3         Middoundties Co op         CV/34 BAA         25/05/2021         Status           1est Supplier 4         Test         CV/44 BAA         25/05/2021         Microsoft Supplier 4         Microsoft Supplier 4 <t< td=""><td>Feet Supplier 3         Middoundties Co op         OV/34 EOA         Sold Sold Sold Sold Sold Sold Sold Sold</td><td></td><td></td><td>OX28 4BN</td><td></td><td>Remove Supplier</td></t<>	Feet Supplier 3         Middoundties Co op         OV/34 EOA         Sold Sold Sold Sold Sold Sold Sold Sold			OX28 4BN		Remove Supplier
Test Supplier4     Test     CV44DA     25/05/2021     Accent Supplier       Test Supplier 5     1 Test Road     TST1 3UV     25/05/2021     Immediate       Test Supplier 6     Im Tend House     560 1DX     27/04/2021 H     Immediate       Ent Supplier 7     Co-operative House     0/34EDA     3607/2021 Marketing     Competitioner Ministry       Showing 110 7 of 7     Enter Supplier 7     Enter Supplier 7     Enter Supplier 7     Enter Supplier 7	Test Supplier4     Test     CV44CA     25/50/2021     Accept Supplier       Test Supplier 5     1 Test Road     TST 13.0V     25/50/2021     Immediate       Test Supplier 6     Im Tend House     560 10X     27/64/2021 H     Request Norm 60       Ent Supplier 7     Coroperative House     C/348CA     26/07/2021 Marketing     Coroperative House       Showing 110 7 of 7     Free Supplier 7     Googne attractive House     Free Supplier 7     Googne attractive House			CV34 6DA	25/05/2021	Status
Test Suppler'S     1 Test Road     TCS1 1.1W     25/05/021       Test Suppler'S     In 7 Test House     560 1DK     27/04/021 H       Test Suppler T     Co-operative House     0/14/04 A     26/07/021       Showing 1 to 7 of 7     Co-operative House     0/14/04 A     26/07/021	Test Suppler'S     1 tell Road     TST 1 UW     25/05/021       Test Suppler'S     In - Tend House     560 IDX     27/04/021 H     Request toor info       Test Suppler T     Co-operative House     0/1400 A     26/07/021 H     Anketing       Showing 1 to 7 of 7	est Supplier 4	Test	CV346DA	25/05/2021	Accest Supplier
Test Supplier 7     Co-operative House     CV346DA     2x(077022)     Marketing     Charge Status Mission       Schowing 1to 7 of 7     Contracts     Contracts     Contracts       Provide     Fill Schowing Status Mission     Reports       Contracts     Fill Schowing Status Mission     Reports       Contracts     Exercise     Exercise       Contracts     Discources Blonge     Discources Blonge	Test Supplier 7     Co-operative House     CV346DA     2x(0770231)     Marketing     Observation       Schooling 150 7 of 7     Contents     Contents     Reports	Fest Supplier 5	1 Test Road	TEST1 3LW	25/05/2021	Process automoti
Text Supplier 7     Co-operative House     CVAMBA     36/07/021     Marketing     Coarrige Subant Maard       Showing 11o 7 of 7	Text Supplier 7     Co-operative House     CVAMBA     26/07/2021     Marketing     Costange Status Maard       thowing 110 7 of 7 <td< td=""><td>Fest Supplier 6</td><td>In-Tend House</td><td>S60 1DX</td><td>27/04/2021 H</td><td>Request More Info</td></td<>	Fest Supplier 6	In-Tend House	S60 1DX	27/04/2021 H	Request More Info
Cartora Showing 1 to 7 of 7 Cartora Cartora Action Document Biorge	Contraction Charlenge 1: 10: 7 of 7 Charlenge 1: 10: 7 of 7 Charleng	Test Supplier 7	Co-operative House	CV346DA	26/07/2021 Marketing	
						Actions Document Storage

This is an important step in the process and if not done, then the supplier will not show when you are adding a contract. When you click this button a pop-up window will appear for you to check all of the information you have added for the supplier is correct. Once you are satisfied these are correct you can click *Accept Supplier* in the pop-up window.

Now your supplier has been added to the system you can proceed to add a contract and any documents associated to them. Remember, you will need to provide the supplier with their temporary log in details. Users can refer to the **Supplier In-Tend Communications Template** for guidance on this and should also issue the **Supplier In-Tend User Guide** to the supplier.

#### 5. Amending a supplier record

You will first need to search for the supplier.

To see a supplier's details, which contracts and documents are linked to a supplier, make amendments and request documents from a supplier, you can highlight the supplier name in the row on the screen by clicking on it, and then click the *Supplier Summary* button on the right-hand side as shown below:

Filter: Show All	In     V     Supplier	* s	earch Clear Search	Advanced	Options Supplier Summary support commars
plier↑₹	Building Address	Postal Code	Phone	Registered Classification	Add Supplier
Supplier 1	Co-operative House	CV346DA		16/07/2021	Edit Supplier
Supplier 2	Hexagon Business Centre	OX28 4BN		25/05/2021	Remove Supplier
Supplier 3	Midcounties Co-op	CV34 6DA		25/05/2021	Status
Supplier 4	Test	CV346DA		25/05/2021	Accept Supplier
Supplier 5	1 Test Road	TEST1 3LW		25/05/2021	Reject Supplier
Supplier 6	In-Tend House	S60 1DX		27/04/2021 H	Request More Info
wing 1 to 6 of 6					Change Status Wizard
					Contracts
					Reports
					Actions
					Document Storage
					Close

This will then take you to the below summary screen:

In-tend File + Project +	Stage - Contracts - Message	s • Administration • Reports • H	elp <del>-</del>		
🛼 Supplier Summ	nary				in-community   Suppliers   Home   He
Test Supplier 1					
Supplier	Test Supplier 1				5 Edit Supplier
Building Address	Co-operative House				Request Document
Street Address	Warwick Technology Park				Document Storage
Phone					Actions
Company Registration Number					
VAT Number					
Publish e-Mail					Change Status Wizard
Classification					Correspondence Summary
Last Logged In	16/07/2021 12:25				
Contacts 2					
Documents	3				
File				Document type	Status
Please upload a copy of your u	updated ISO accreditation.			ISO Accreditation	Pending
Signed Ethical Code of Condu	ct.pdf			Ethical Code of Conduct	Expired
Contracts	4				
		Reference	Customer		Expiry
Title					

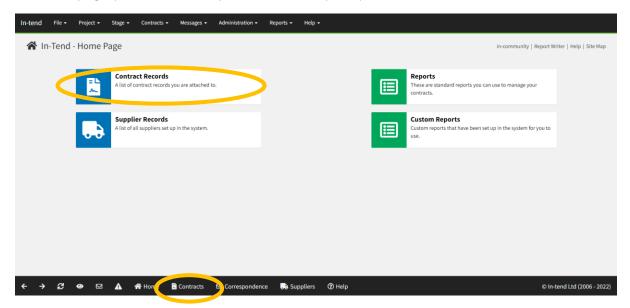
From here, you can access the supplier's information and perform various functions. Those which are highlighted can be used:

- 1. This section shows the supplier details that have been inserted by the user.
- 2. This section shows the supplier's contacts.

- 3. This section shows any documents which are linked to the supplier and their status. Although most documents are held in the contract record.
- 4. This section shows the contract records that the supplier is linked to (there can be more than one).
- 5. If you click the *Edit Supplier* button this will enable you to edit the supplier's information. Once you have made any changes you need to click *OK*. Any changes you make will appear as an audit trail in the system in the 'Snapshots' tab.
- 6. If you click the *New Correspondence* button, you can send correspondence to a supplier within the system and they can respond via their web portal.
- 7. All correspondence with a supplier can be seen by clicking on the *Correspondence Summary* button.

#### 6. Searching for a contract record

To search for a contract on In-tend, select the *Contracts Records* or the *Contracts* button on the homepage (both will direct you to the same place) as below:



This will bring up the full list of contract records in the system that you have access to. You can use the Data Filter bar highlighted below to search for a specific contract you are looking for by filling in the relevant boxes and clicking the *Search* button. A useful function here is that you can export this information into a printable, Excel or CSV file by clicking on the buttons at the top right-hand side of the screen and following the steps to download:

N/mono         Number         Explay         TZ         Case           Contract Std1         Varunopop.CO202         Test Supplier 4         20         11/17/00421         0           Contract Std2         Test Supplier 4         20         51/17/00421         0         Contract Std2	t Summery Contract Contract
Inff         Explore         Explore         Tot         Explore         Explore<	
Inf         Control         Control         Control         Tot         Control         Tot           Control 001         Immediated matching         Text Supplier 1         Immediated matching         Text Supplier 1	
Contract 001         Yourcoop(1/0024         Avails and security         Yeart Supplier 1         ID         15/07/2004         6           Contract 002         Yourcoop(1/0022         Yeart Supplier 4         ID         0.0(0)/2021         6	
t Contract 002 Yourcoop/C/0022 Test Supplier 4 🗹 01/09/2021 🚱	
A Constant AV3	
	proval
t Contract 004 Yourcoop/C/021 Test Supplier 4 🗹 03/10/2021 🚱 Charge	Workflow
wing 1 to 4 of 4 Custom	Templates
Cut	m Fields
	915
Compa	re Answers
	ports
au construction of the second s	tions
Boom	ert Storage
	lose

A useful tip if you want to search for all contracts visible to you, is to insert an underscore in the *Search* box, and then click the *Search* button. Sometimes you may need to change the data filter to 'Show All' if your contract is not appearing. If you still cannot see your contracts or you believe your access is incorrect, please email <u>In-tend@midcounties.coop</u>

If you wish to access and amend the contract record, please refer to the guidance on this by clicking <u>here</u>.

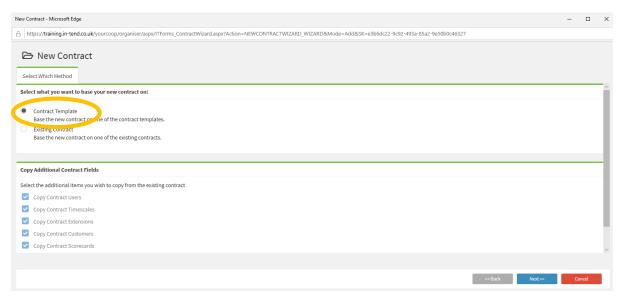
#### 7. Adding a contract record

Remember, before you can add a contract record on the In-tend system, you need to check that the relevant supplier is listed. This is because the system works in such a way, where any contract uploaded needs to be attached to a supplier. Please see guidance on how to search for a supplier and how to add a supplier.

Firstly, you need to navigate to the contracts section of the system. You can select the *Contract Records* or the *Contracts* button on the homepage (both will direct you to the same place) as below:

In-tend	File 🗸	Project 🗸	Stage 👻	Contracts 🗸	Messages 🕶	Administration -	Reports 👻	Help 👻			
😭 In	-Tend	- Home F	age							in-community   Re	eport Writer   Help   Site Map
		~		ract Records f contract records	you are attached I	to.				Reports These are standard reports you can use to manage your contracts.	
				lier Records fall suppliers set (	up in the system.					Custom Reports Custom reports that have been set up in the system for y use.	ou to
<b>← →</b>	ø	• 🛛	▲	希 Home	🖹 Contracts	🖸 Corresponden	ce , Suj	ppliers	⑦ Help		© In-tend Ltd (2006 - 2022)

This will bring up the full list of contracts in the system that you have access to. You will need to select *Add Contract* on the right-hand side. This will bring up the pop-up window below. You should ensure that *Contract Template* is ticked and then click *Next*.



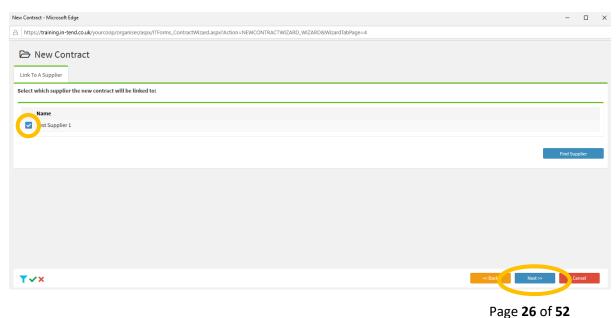
You then need to select The Midcounties Co-operative Contract and then click Next.

This will then bring you to the part where you select which supplier you are attaching the contract to. You need to click *Find Supplier* on the right-hand side which will bring up the page below. Remember, if your supplier isn't showing, this is likely to be because you have forgotten to 'Accept' the record when you added it onto the system. You can revisit these steps here - how to add a supplier.

Supplier Field Starten				
Data Filter: Show All	▼			
_	in • Supplier	▼ Search	Clear Search Advanced	
Supplier	Building Address	Postal Code Country	Phone	Classification
Test Supplier 1	Co-operative House	CV346DA United Kin	gdom	
Test Supplier 2	Hexagon Business Centre	OX28 4BN United Kin	gdom	
Test Supplier 3	Midcounties Co-op	CV34 6DA United Kin	gdom	
Test Supplier 4	Test	CV346DA United King	gdom	
Test Supplier 5	1 Test Road	TEST1 3LW United King	gdom	
Test Supplier 6	In-Tend House	S60 1DX United King	gdom	н
	Co-operative House	CV346DA United King	ada an	Marketing

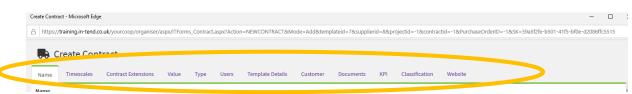
You can use the Data Filter bar highlighted above to search for a specific supplier you are looking for by filling in the relevant boxes and clicking the *Search* button. A useful tip if you want to search for all suppliers, is to insert an underscore in the *Search* box, and then click the *Search* button. Once you have found the correct supplier, tick the box next to the supplier's name and then click *OK*. If Midcounties are the supplier for the contract you are uploading, please see the guidance here.

You should now see the supplier appear on the page you were originally on. You now need to tick the supplier's name on this page and click *Next* as below:



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This will bring up a pop-up window for you to insert all of the contract information. Please note the multiple tabs across the top of the screen that you will need to work through:



Any field which is highlighted in yellow is mandatory and must be completed. Best practice is to insert as much information as possible in any field, regardless of whether it is mandatory. You should now work through each of the tabs, remembering to scroll to the bottom of each one as you complete the fields.

Name – As a minimum you need to complete the title of the contract, this should be a clear and concise overview of what the contract covers (i.e. goods/services purchased). The reference will auto populate once you have created the contract. You should then insert a description with as much information as possible. Then, select which parts of the Society this contract applies to by using the drop down list, this will determine if other colleagues can view the contract and is an important step. If you do not need to attach any additional departments you can untick this box. Please keep 'Attach additional users' ticked. Your name will autopopulate as the main contact and you should see the supplier you selected already listed. Once completed this should look like the below:

Create Contract - Microsoft Edge		- D
A https://training.in-tend.co.uk/yourcoop/organi	iser/aspu/TForms_Contract.aspirlAction=NEWCONTRACT&Mode=Add&templateid=78supplierid=8&projectid==1&contractid=-1&PurchaseOrderID=1&SK=59a52te=b501=4165-biRe-d28&6ftc5515	
Reate Contract	ns Value Type Users Templata.Details Customer Documents KPI Classification Website	
Name		
Title	Society Uniform Contract	
Reference		
Description	Contract for the provision of uniforms for Food Retail, Travel, Childcare and Funeral.	
	San	ndard Text
Main project sponsor, customer or departmen		
1. Midcounties Coop (Society Wide)		
Attach additional departments		
Main Contact		
Supplier	MCC Procurement TetSupplier 1	
Synopsis	i ret support a	
	Add View	Remove
		_
Commodities		
Associated Contract		
Is this contract associated with another contra	act?	
(None)		
	ee diack Read to a	Cancel

You can also choose if the contract is associated with another in the system. Once completed, please click *Next* or click on the next tab at the top of the window.

**Timescales** – Here, you need to tick the boxes for start, end and expiry and then insert the relevant dates:

- Start Date - this is the date the contract commenced

- End Date this is the end date of the contract. To minimise risk the Society needs to ensure that contract records are reviewed on a regular basis. To support this, an end date should be inserted for ALL contract records (with the exception of Travel Agency Agreements). For any records where you do not have/know the end date or where it is a rolling contract, you will need to ensure a date is inserted for review within 2 years.
- Expiry this should match the end date of the contract.

You then need to set when you would like the system to remind you, the supplier and any associated users that the contract record is expiring. You can insert multiple days in the field below by inserting the numbers with a comma in between and no spaces. If you do not wish for the supplier to receive alerts ensure the relevant box is unticked below.

Create Contract - Microsoft Edge		- 0
A https://training.in-tend.co.uk/yourcoop/orga	anlser/app/ITforms_Contract.app/Action=NLWCONTRACT8Mode=Add8deerplateid=78supplierid=88prnjectid==18contractid==18PurchaseOrderID==18.0K=59si51zl=b501=415-bfD=d2086ffc3515	
Create Contract		
	ions Value Type Ubers Template Details Customer Documents KPI Classification Website	
Time Zone		
Contract Time Zone	(UTC+00.00) GMT Standard Time	
Contract		
Start Date		
End Date	2 10 02/0024	
Expiry	101/08/2004	
Current Extension		
Current Extension Start Date		
Current Extension End Date		
Current Extension Number		
Remind When?		
Remind prior to expiry date		
Remind	5,20,00 days before.	
Remind on the day the contract expires		
who?		
Send e-mail reminder to the supplier		
Send e-mail reminder to the relevant user	ns 🥖	
	**BaX N	int >> Cancel

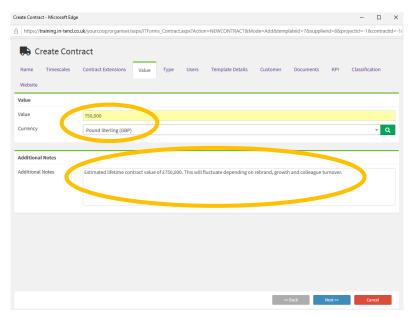
Once completed, please click *Next* or click on the next tab at the top of the window.

**Extensions** – On this tab you can insert any contract extensions by clicking *Add Extension*. This will bring up a pop-up window for you to complete. As a minimum you need to insert a start and end date and a reference for the extension, then click *OK*. In this instance, we have inserted a 2 year contract extension after expiry:

Add Contract Extension - Microsoft Edge	-		$\times$
A https://training.in-tend.co.uk/yourcoop/organiser/aspx/ITForms_ContractExtension	.aspx?Act	ion=ADE	CONT
Contract Extension			
Timescales			
Start Date 📋 01/08/2024			
End Date 01/08/2026			
2 year extension upon contract expiry if not terminated			
Automatically match the compact enging and annual extension and date whe	n extende	d	
Description			
	Standar	d Text	1
ОК	9	an I	

This will then appear in the tab you were originally on and then you need to click *Extend Contract* in the menu on the right-hand side. Once completed, please click *Next* or click on the next tab at the top of the window.

**Value** – Here, you need to insert the lifetime value of the contract (excluding VAT) and select the relevant currency. You should not insert a pound sign or any commas. In the example below, the value of the uniform contract is estimated to be £250k each year over a 3 year contract. You can also insert any useful additional notes to explain any anomalies:



Once completed, please click *Next* or click on the next tab at the top of the window.

**Users** – This tab allows you to select other users who require system email alerts for the contract. You can scroll through the list of users or use the Data Filter bar to search for a specific colleague for by filling in the relevant boxes and clicking the *Search* button. Once you have found the colleague(s), you will need to tick the box next to their name, this will ensure they receive system email alerts for this contract. For example:

MCC Procurement Contract Managers Group Receive V Receive	<b>First Name</b>	Surname	Groups	System Email Alerts		Custom Field Email Ale	erts
	🗹 мсс	Procurement	Contract Managers Group	Receive	$\sim$	Receive	$\sim$

You as the user uploading the contract, will be automatically selected to receive system notifications when you save the record. Once completed, please click *Next* or click on the next tab at the top of the window.

**Template Details** – This tab is particularly important as it allows our Legal team to review the risk associated with contracts and can prioritise those which require review and support. The majority of fields on this tab are all mandatory and it's very important to be as accurate as possible when completing these. The Society recognises that there may be historic, incomplete contracts which don't necessarily align with our current standard and this is accepted. It's important to gain visibility of these so that any gaps can be addressed, and high-risk areas can be brought to our Legal team's attention. Please do not guess the answers, if you don't have

the information or you are uncertain, it is always best to select 'Not sure' rather than select incorrectly. The following fields should be completed:

1. Has the contract spend been approved by Finance Governance? – Contracts with a lifetime value over £25k should be approved by Finance Governance. You should select the most appropriate answer here.

1.1 Please insert the Capex Project Reference if applicable (usually made up of 3 letters and 6 digits). Please leave blank if this is not a capital spend

- 2. Has the contract been reviewed by Legal? You should select the most appropriate answer here.
- 3. Has the contract been signed and dated by both parties? You should select the most appropriate answer here. Where you do not have a copy of the contract, you should select 'No and there is no copy of the contract'.
- 4. Does this contract involve the sharing or processing of any personal data? This relates to GDPR provisions. You should select the most appropriate answer here.
- 5. Does the contract refer to warranties, indemnities or SLAs? You can select one or more answers here.
- 6. Is outsourcing involved where staff transfers (TUPE) may occur? You should select the most appropriate answer here. Please seek advice from HR if you are uncertain.
- 7. Has the supplier signed our Ethical Code of Conduct? You should select the most appropriate answer here. If you select 'Yes', you will need to upload a copy later on in the process.
- 8. What is the notice period required to terminate the contract? Please ensure you read the contract detail carefully to understand when the notice will be effective and by what method.
- 9. If your contract has an end date what date do you need to serve notice by? Please ensure you read the contract detail carefully to understand when the notice will be effective and by what method. If this in not applicable then please leave the box unticked.
- 10. Is this contract relating to Goods For Resale (GFR) or Goods Not For Resale (GNFR)? Please select which applies.

Once completed, please click *Next* or click on the next tab at the top of the window.

**Customers** - This tab is only relevant if you selected that other departments require access to your contract. If they do not, please leave this blank. Once completed, please click *Next* or click on the next tab at the top of the window.

**Documents** – This is where you can add a copy of the contract and any associated documents to the contract record. For guidance on what should be uploaded in this section, click <u>here</u>.

First you should click *Add Document* on the right-hand side. This will bring up a pop-up window where you will need to fill in multiple tabs:

A https://t	raininɑ.in-te	nd.co.uk/vourc	oop/organiser/aspx/	TForms E
	ld Doci	Iment		
A				

You will need to upload the file first by clicking *Add* on the first tab and follow the steps. You will then need to insert a description, select the type of document and an expiry date (for the contract, this should match what you have already inserted in the Timescales tab). You can then choose whether the document should be made visible to the supplier:

**Documents you would like the supplier to have access to** – for example, a copy of the contract. To do this you need to change the document details so that these are *Private* (DO NOT use the Public option) and ensure that you untick the *allow supplier to manage this document* box. This ensures they can view and upload new documents, but not amend or replace this one. You can leave the *Expiry date* field unticked if the document doesn't expire. Once filled in this should look like the screen below:

dd Document - Microsoft Edge		-
https://training.in-tend.co.	k/yourcoop/organiser/aspx/ITForms_Document.aspx?Action=NewDocument&Mode=ADD&Parameter0=PARAM0~5&Parameter1=PARAM1~~1&P	arameter2=PARAM2~-1&Parameter3=US
🗁 Add Docume	nt	
Details Notes Rev	sions Reminders	
Document		
Test Contract.docx		Add View Re
Attac.		
Folder		
Description	Signed and dated contract	
Revision no.		
Document type	Contract	
Expiry date (leave unticked never expire)	☑	
Details		
Publish To Web	Inter i Private Public	
Document pending		
Allow supper to mana	je this document	
Archived		
Archived?		
Allow the supplier to an	hive this document?	
		OK Cance

**Documents you do not wish for the supplier to have access to** – for example, any tender analysis documents. Please be very careful when uploading any internal documents which may contain internal confidential information. To do this you need to change the document details so that these are *Internal*. This ensures that the document is uploaded to the record on Intend, but the supplier won't have visibility of this on their web portal. You can leave the *Expiry date* field unticked if the document doesn't expire. Once filled in this should look like the screen below:

dd Document - Micro		_	
https://training.ir	-tend.co.uk/yourcoop/organiser/aspx/ITForms_Document.aspx?Action=NewDocument&Mode=ADD&Parameter0=PARAM0~4&Parameter1=PARAM1~-1&Parameter2=PARAM2~8&P	Parameter3=USERSTF	RING~
🗁 Add Do	cument		
	cument		
Details Notes	Revisions Reminders		
Document			
Associated With S	pplier : Test Supplier 1		
Document			
Tender Analysis.po	f Add	View	Remov
Attached By			
Description	Analysis document used to select the nominated supplier during the tender process.		
Revision no.			
Document type	Other		-
Expiry date (leave u			
never expire)	ticked for a 27/07/201		
Details			
Publish To Web	Internal      Private		
Document pe			
Allow supplie	to manage this document		
		ок с	Cancel

You can add any notes about this document on the next tab, see any revisions on the following one, and the final one allows you to set reminders to notify you, the supplier and any associated users when the document is due to expire. You can insert multiple days in the field below by inserting the numbers with a comma in between and no spaces. If you do not wish for the supplier to receive alerts for the document then ensure the relevant box is unticked below:

S Add Document - Google Chrome	-		$\times$
in-tendorganiser.co.uk/yourcoop/aspx/ITForms_Document.aspx?Action	=NewDocu	ment&M	lo
Details Notes Revisions Reminders			
Remind When?			_
Remind prior to explore date			
Remind 30,90,180 days before.			
Continue to remind daily after document has expired			
Remind Who?			
Send e-mail reminder to the supplier			
Send e-mail reminder to the relevant users			
ок	с	ancel	

Once you have added all documents, please click *Next* or click on the next tab at the top of the window.

**KPI** – This tab does not need to be completed. This is functionality in the system will be considered in the future. Please click *Next* or click on the next tab at the top of the window.

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**Classification** - This tab allows you to add classifications to the contract. First click *Manage* on the right-hand side. This will bring up a pop-up window for you to complete.

If you insert an underscore in the *Search* box, and then click the *Search* button this will bring up a full list of classifications available in the system. Alternatively, you can use the Data Filter bar to search for a specific one by filling in the relevant boxes and clicking the *Search* button.

Once you have found the correct classification (you can add more than one as appropriate), you need to tick the box next to the name and then click *Insert* on the right-hand side, as below:

tract Classification - Microsoft Ed	pe .					-	×	
https://training.in-tend.co.uk/	yourcoop/organiser/aspx/ITForms_0	ClassificationManage	aspx?Action=CONTRACI	CLASSIFICATION&KeyField=	18/5K=8a7b555c-f234-4o41	7-bd01-39767c4116a0		
Contract Class	ification						0	
lassification								
elected Classification List								
Category Code	Sub Category Code	Title				Hen	kove	
lassification Field Search - to	add a classification, please use th	he search options, s	elect the codes you requ	uire and then select Insert				
					Advanced			
	add a classification, please use th	ne search options, s	elect the codes you requ	uire and then select Insert Clear Search	Advanced		ert	
Uniform	n ~ Title	~			advanced		ert	
Uniform					Advanced		हर्ष	
Uniform	n V Title	~ Title†≣			Advanced	In	et	
Uniform	n V Title	~ Title†≣			Advenced	(in	et	
Uniform	n V Title	~ Title†≣			Advanced		et	
Uniform	n V Title	~ Title†≣			Afrenend.		et	
Uniform	n V Title	~ Title†≣			Abureet.	ju ju	en	

This should then appear in the top section of the pop-up window like below and you can click OK to proceed, as below:

Classification		
Selected Classification List	t	
Category Code	Sub Category Code	Title
Society General	Consumables	Uniforms
		e the search options, select the codes you require and then select Insert
Classification Field Search	- to add a classification, please us	e the search options, select the codes you require and then select Insert
Classification Field Search Uniform	- to add a classification, please us	e the search options, select the codes you require and then select Insert           Search         Clear Search         Advanced

This will take you back to the Classification tab where you should now see your selection inserted. Please click *Next* or click on the next tab at the top of the window.

**Website** – on this tab you will need to select that the supplier should confirm receipt of the contract if you are publishing the record to the supplier via the web portal.

The Expression of Interest section does not need to be completed as this functionality is not currently being used.

Finally, you should also choose if you want all users to be emailed when any correspondence from the supplier is received via the web portal:

Name Timesca	les Contract Extensions Value Type Users Template Details Customer	Documents KPI	Classification	Website
Contract Receipt				
Fe ce the suppl	ier to confirm receipt of the contract?			
Expressions of Inter	art			
Allow expression				
From	1 27/07/2021			
То	27/07/2021			
Correspondence				
	users when correspondence is received			
E Jail contract				
Raise action on user	users when correspondence is received when incoming correspondence is received			
E Jail contract				
Raise action on user	when incoming correspondence is received			

Once you have completed all of the tabs, click *Next* on the bottom right-hand corner of the pop-up window. This will then take you to a summary page of the contract record you have created. You should review this and make sure all of the information is correct. If you need to amend anything you can click *Back* on the bottom right-hand corner of the screen and navigate to the relevant tab. If you are happy with the information show, click *Finish*. You should now see the new contract in the list. If the system does not let you finish and takes you back to a particular tab, this is because there is something you have filled in incorrectly. You will need to amend the information on the tab and follow the steps again to finish.

The next step is to publish the contract to the website so that the supplier can view the record and any documentation you have allowed them access to. Note how below, there is no green tick box next to the newly added contract. This is because it has not yet been published. To do this, highlight the newly added contract in the list and click on *Contract Summary* on the right-hand side of the page:

R     A     G     Reference     Description     Suppler     Dapler     T2       Contract for the processor (2002)     Contract for the processor (2002)     Contract for the processor (2002)     Test Suppler 1     1	Exercision         Exercision           ID         12.00/2014         E           ID         12.00/2014         E           ID         0.20/2011         E           ID         0.00/2011         E           ID         0.00/2011         E           ID         0.00/2011         E
Nutlef     R     A     C     Reference     Description     Suppler     Cplay     Top     Top       acxidy fundame Curtural     Image: Contract for the province of definitions and the image for the province of the province of definitions and the province of	Depiny         TZ         Edit control           10 000201         0         Control         Control           20 100/0201         0         Annowal         Control         Control           20 100/0201         0         Control
Intel         R         A         G         Reference         Description         Test Suppler         Dury         YZ           construction         Image: Construction	Days         T/2         Date of Contract           100/0024         Contract         Contract
Verocopic/Co203         Contract the Nanoport Junction Part Stoppler 1         1	III.002374         Contract Malay           III.0072784         III.007278           III.0072784         III.007278           III.0072787         IIII.007278           III.0072787         IIII.007278           III.0072787         IIII.007278           III.0072787         IIII.007278           III.0072787         IIIII.007278           III.0072787         IIIIIII.007278           III.0072787         IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
ent Contract 001 1990 crosses (2004 Audit and security 1985 Supplier 1 10 15/07/0314 6 10 16/07/0304 6 10 16/07/0314 6 10 16/07/0314 6 10 16/07/0314 6 10 16/07/0314 6 10 16/07/0314 6 10 16/07/0314 6 10 16/07/0314 6 10 16/07/0314 6 10 16/07/0314 6 10 16/07/0314 6 10 16/07/0314 6 10 16/07/0314 6 10 16/07/0314 6 10 16/07/0314 6 10 16/0	
Set Contract 002         Year coopeC0022         Test Supplier 4         ID         0,000,0021         G         Common C	
داد (contract 00.000)         The Experime 4         Contract 00.0000000         Option 00.0000000000000000000000000000000000	C 0000021     C 00100221     C 00100000     C 00100000     C 00100000     C 0010000     C 001000     C 00100     C 0010     C 001     C 0010     C 0010     C 001     C
et contract04 Tourcoop/C7022 Test Supplier 4 D 0130222 C	03/20/2823
comp 105 of 5	KPF3 Compare Answers
	Солгране Альнега
	Actions
Decum	Document Storage
	Close

Contract Summary		in-community   Contracts   Home   H
Society Uniform Contract		
Title	Society Uniform Contract	Edit Contract
Supplier Portal	Not Published	Extend Contract
Reference	Yourcoop/C/0025	Contract History
contract Time Zone	(UTC +01:00) GMT Daylight Time	Approval
escription	Contract for the provision of uniforms for Food Retail, Travel, Childcare and	
Contract Status	Not Requiring Approval	Change Workflow
ustomer Name	1. Midcounties Coop (Society Wide)	
fain Contact	MCC Procurement	Publish Manager
upplier	Test Supplier 1	
upplier Telephone	07437015053	Document Storage
upplier e-Mail	shani.knight@btinternet.com	Actions
tart Date	01/08/2021	Change Status Wizard
ind Date	01/08/2024	
xtension Date		Contract Report Wizard
cpiry Date	01/08/2024	
ublished		
. Has the contract spend been pproved by Finance Governance?	Yes	
A. Has the contract been reviewed by legal?	Yes in the last 6 months	
I. Has the contract been signed and lated by both parties?	Ves	
<ul> <li>Does this contract involve the haring or processing of any personal lata?</li> </ul>	No	
. Does the contract refer to	Indemnities.SLAs	

You will then need to select *Publish Manager* from the menu on the right-hand side:

The *Publish Manager* button allows you to publish the contract record, any newly added documents and any changes to the supplier's web portal. It is good practice to do this every time an amendment is made to check the settings are correct. You should select the below preferences before clicking the *Publish* button:

Publish Manager - N	licrosoft Edge -	- 🗆	×
A https://trainin	g.in-tend.co.uk/yourcoop/organiser/aspx/ITForms_PublishMana	iger.aspx?Ac	tion=PI
半 Publi	sh Manager		
Preferences	Portals		
Preferences for	displaying contract on the supplier web portal		
Contract	Test Contract 001		
/isible On 1	Website		
Visible On	New Contracts List		
Visible On	Current Contracts List		
	Expiring Contracts List		
Visible Onl	y When Suppliers Are Logged In		
Allow Onlin	ne Correspondence		
Publish As	sociated Contracts		
	<< Back Publish	Cancel	

You should see the below pop-up window when this is successfully completed:

n-Tend - Information - Microsoft Edge	-		×
https://training.in-tend.co.uk/yourcoop/organiser/aspx/ITErrorForm.aspx?ErrorType	=28/ErrorCo	unter=4	
In-Tend - Information			
		Clos	_

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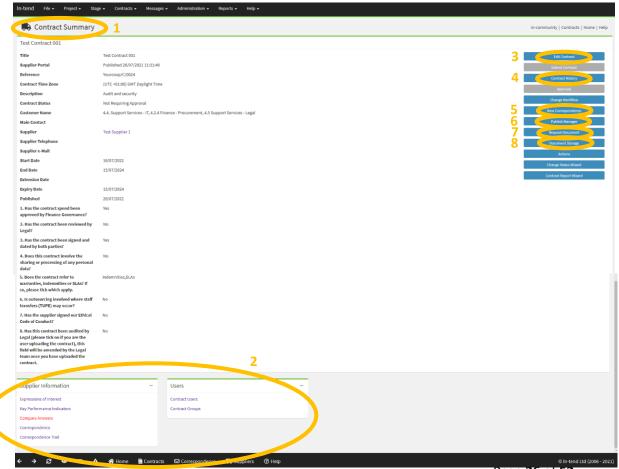
#### 8. Amending a contract record and managing documents

You will first need to search for the contract.

To view the details of a contract, highlight the relevant row and then click the *Contract Summary* button on the right-hand side:

a Filter: Current Contracts	v		Ŧ	Search Clear	Search Advanced			Options Contract Summary
le⊺≓	R A	G R	leference	Description	Supplier	Expiry	T/Z	Edit Contract
t Contract 001				Audit and security	Test Supplier 1	15/07/2024	•	Extend Contract
t Contract 002			ourcoop/C/0022		Test Supplier 4	01/09/2021	•	Contract History
t Contract 003		Y	ourcoop/C/0020		Test Supplier 4	05/09/2021	•	Approval
t Contract 004		Y	ourcoop/C/0021		Test Supplier 4	03/10/2021	€	Change Workflow
owing 1 to 4 of 4								Custom Templates
Wing 1 to 4 of 4								Custom Fields
								KPI's
								Compare Answers
								Reports
								Actions
								Document Storage
								Close

This will then take you to the below summary screen:



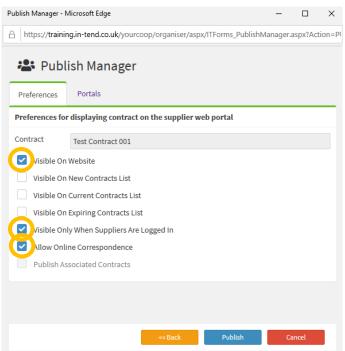
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From here, you can access the key information for the contract and perform various functions:

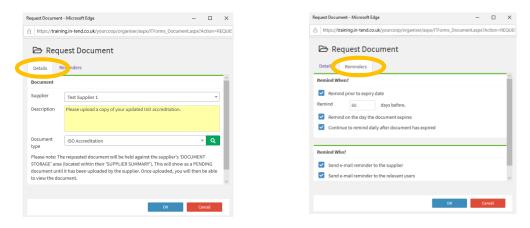
- 1. This section shows all of the key information about the contract that was inserted by the user. From here, you can also click into the Supplier Summary page by clicking on the supplier name hyperlink.
- 2. Only the correspondence functions listed here are relevant. These can be used to view any correspondence with the supplier via the web portal. The other points listed are not relevant for the way the Society is using the In-tend system at present.
- 3. If you click the *Edit Contract* button this will enable you to make amendments to the contract record (e.g. adding an <u>extension</u>). Any changes made are shown as an audit trail in the 'Snapshots' tab. If any edits are made here, you will need to click *Summary* when you are finished, then double check the information is correct before clicking *Finish.* The system will prompt you to publish any changes to the supplier's web portal, you should click *OK* here.
- 4. If you click the *Contract History* button this will give you an audit trail of all amendments that have been made to the contract and by who. A useful function here is that you can export this information into a printable, Excel or CSV file by clicking on the buttons at the top right-hand side of the screen:



- 5. If you click the *New Correspondence* button, you can send correspondence to a supplier within the system and they can respond via their web portal.
- 6. The *Publish Manager* button allows you to publish any changes to the supplier's web portal. It is good practice to do this every time an amendment is made to check the settings are correct. You should select the below preferences before clicking the *Publish* button:



7. If you click the *Request Document* button you can fill in the information in the pop-up window to send a request to the supplier for them to upload a document via the supplier web portal. Please see an example of how this can be used below, remember to fill in both the *Details* and *Reminders* tab before clicking *OK*:

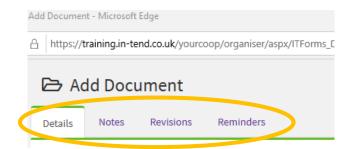


8. The *Document Storage* button shows all documents which are associated with this contract, below is an example of what this looks like.

Iter: Show All	+ Associated With Contra	ict : Test Contract 001 - Test Supplier 1				Documents
h	* File	Search Clear Search Advanced				Add Document
						Add Folder
File	Publish Rev	17 Description	Туре	Expires	Date Uploaded T/Z	Add Multiple Documents Document Wizard
B Security Management policy.pdf	Private 1		Information Security Management Plan	16/07/2022	16/07/2021	
Test Contract.docx	Private 2	2	Ethical Code of Conduct	24/10/2021	16/07/2021	Add Revision
*	Private 1	3 Please upload a copy of your updated ISO accreditation.	ISO Accreditation		26/07/2021	
en en Ethical Code of Conduct.pdf	Private 1	4 Signed Ethical Code of Conduct	Ethical Code of Conduct	26/07/2021	26/07/2021 🕤	View
Information Security Plan.pdf	Private 1	5 Supplier's information Security Plan	Information Security Management Plan	27/07/2022	27/07/2021	Save
						Create New Action
						Actions
						Close

To **view** the documents, simply highlight the row and double click, then the document will appear in a new window. You'll see above that the ISO accreditation request we uploaded in the last step does not yet have a file uploaded because there is an **x** listed against it. This will change to a document symbol when the supplier uploads this via their web portal. If at any point you would like to amend a document in this section, highlight this in the list and then click *Details* or please use the *Add Revision* button, instead of removing the document so that we can maintain an audit trail.

You can also use this section to **add** any new documents to the contract record. You can do this by clicking *Add Document* on the right-hand side. This will bring up a pop-up window where you will need to fill in multiple tabs:



You will need to upload the file first by clicking *Add* on the first tab and follow the steps. You will then need to insert a description, select the type of document and an expiry date. You can choose whether the document should be made visible to the supplier:

**Documents you would like the supplier to have access to** – for example, the supplier's Information Security Plan. To do this you need to change the document details so that these are *Private* (DO NOT use the Public option) and ensure that you untick the 'allow supplier to manage this document box'. This ensures they can view and upload new documents, but not amend or replace this one. You can leave the *Expiry date* field unticked if the document doesn't expire. Once filled in this should look like the screen below:

Add Document - Microsoft Edge	- 🗆 X
https://training.in-tend.co.uk/yourcoop/organiser/aspx/ITForms_Document.aspx?Action=NewDocument&Mode=ADD&Parameter0=PARAM0~4&Parameter1=PARAM1~-1&Parameter2=PA	RAM2~8&Parameter3=USERSTRING~&Parame
Add Document      Details Notes Revisions Reminders	
Document	^
Associated With Supplier : Test Supplier 1	
Information Security Plan.pdf	Add View Remove
Attached By	
Description Supplier's Information Security Plan	
Revision no.	
Document type	- <b>~</b> Q
Expiry date (leave unticked for 27/07/2022 never expire)	
Details	
Publish To Web Inter al 💽 Private	
Document pending      Allow supplier to manage this document	
	v
	OK Cancel

**Documents you do not wish for the supplier to have access to** – for example, any tender analysis documents. Please be very careful when uploading any internal documents which may contain internal confidential information. To do this you need to change the document details so that these are *Internal*. This ensures that the document is uploaded to the record on In-tend, but the supplier won't have visibility of this on their web portal. You can leave the *Expiry date* field unticked if the document doesn't expire. Once filled in this should look like the screen below:

Add Document - Microsoft Edge		-	
A https://training.in-tend.co.uk/	ourcoop/organiser/aspx/ITForms_Document.aspx?Action=NewDocument&Mode=ADD&Parameter0=PARAM0~4&Parameter1=PARAM1~-1&Parameter2=PARAM2~8&Parameter	3=USERSTRI	NG~&Para
🗁 Add Document			
Details Notes Revisio	ns Reminders		
Document			
Associated With Supplier : Test	Supplier 1		
sament			
Tender Analysis.pdf	Add View	Re	move
Attached By			
Description	Analysis document used to select the nominated supplier during the tender process.		
Revision no.			
Document type	Other		Q
Expiry date (leave unticked for never expire)	1 1 27/07/2021		
Details			
Publish To Web	Internal     Private		
Document pending			
Allow supplier to manage t	nis document		
	ок	Ca	incel

You can add any notes about this document on the next tab, see any revisions on the following one, and the final one allows you to set reminders to notify you, the supplier and any associated users when the document is due to expire. You can insert multiple days in the field below by inserting the numbers with a comma in between and no spaces. If you do not wish for the supplier to receive alerts for the document then ensure the relevant box is unticked below:

🗿 Add Do	ument - Google	Chrome				-		
â in-ter	dorganiser.co	.uk/yourcoop/	aspx/ITForms_D	ocument.aspx	Action=Ne	wDocur	ment&N	10
	Add Docı	ument						
Detail	Notes	Revisions	Reminders					
Remin	l When?							
R	mind prior to e	wpiny data						
Remino	30,9	0,180 day	/s before.	)				
<b>R</b>	mind on the da	ay the docume	it expires					
c	ontinue to remi	nd daily after d	ocument has exp	ired				
Remin	Who?							
🗹 Si	nd e-mail remi	nder to the sup	oplier					
🖌 S	nd e-mail remi	nder to the rele	evant users					
				_		_		
					ок	Ca	ancel	

Once you have completed all of the tabs you can click *OK* and the new document will then appear in the Document Storage list. After you have uploaded a new document, it's good practice to follow the <u>steps to publish</u> this again in the *Publish Manager* section to ensure that it is visible on the supplier's web portal if you have allowed them access to the document.

You can **edit** documents by highlighting it in the list and then clicking *Details* from the menu on the right-hand side to bring up the pop up window where you can make any changes.

You can also use the Document Storage section to **archive** any documents (for example if the old contract has expired and you have signed a new one, or the supplier has sent you an updated version of their accreditation). You can do this by highlighting the relevant document in the list and then *Details* on the right-hand side

Show All	w Associated	With Contract : Test Contract 001 - Test Supplier 1				Documents
arch In	+ File	✓ Search Clear Search A	wanced			Add Document
						Add Folder Add Multiple Documents
File	Publish	Rev 17 Description	Туре	Expires Date Uploa	fed T/Z	Document Wined
Signed Ethical Code of Conduct.pdf	Private	1 1	Ethical Code of Conduct	27/07/2022 27/07/2021	0	Details
Security Management policy.pdf	Private	1 2	Information Security Management Plan	16/07/2022 16/07/2021	0	Add David Los
Test Contract.docx	Private		Ethical Code of Conduct	24/10/2021 16/07/2021	Θ	Remove
Information Security Plan.pdf	Private	1 4 Supplier's Information Security Plan	Information Security Management Plan	27/07/2022 27/07/2021	0	Ylew Save
*	📑 Private	1 5 Please upload a copy of your latest ISO accreditation	ISO Accreditation	02/08/2021	Θ	ane
Ethical Code of Conduct.docx	📑 Private	1 6 Signed ECC from tender process	Ethical Code of Conduct	02/08/2022 02/08/2021	Θ	Create New Action
						Actions
						Close

This will bring up a pop-up window with the details of the document. You need to select *Archived* on the first tab and then click *OK*:

Document Details - Google	Chrome	-	
training.in-tend.co.uk	/yourcoop/organiser/aspx/ITForms_Document.aspx?Action=EditDocument&Mode=EDIT&Parameter0=PARAM0~5&Parameter1	I=PARAM1-	1&Par
🔁 Document	. Details		₽
	Details		-
Details Notes	Revisions Reminders		
			11
Revision no.	2		
Document type	Ethical Code of Conduct	v	۹
Expiry date (leave unticked for never expire)	☑ 箇 24/10/2021		
Details			
Publish To Web	🔿 Internal 🖲 Private 🔿 Public		
Document pending			
Allow supplier to m	anage this document		
Archived			
Archived?			
	archive this document?		
	ок	Can	el

This will then remove the document from the list. You can see all archived documents in the Document Storage area by changing the data filter to 'Archived':

ter: Show All	* sociated	With Contract : Test Contract 001 - Test Supplier 1			Documents
	File	Search Clear Search	idvanced		Add Document
Show All					Add Folder
File Pending Documents	Publish	Rev ↑ Description	Туре	Expires Date Uploaded T/Z	Add Multiple Documents
Signed E	Private	1 1	Ethical Code of Conduct	27/07/2022 27/07/2021	Document Wizard
Security occuments With Outstanding Actions	Private	1 2	Information Security Management Plan	16/07/2022 16/07/2021	Details Add Revision
Information Security Plan.pdf	Private	1 3 Supplier's Information Security Plan	Information Security Management Plan	27/07/2022 27/07/2021	Remove
8	🔜 Private	1 4 Please upload a copy of your latest ISO accreditation	ISO Accreditation	02/08/2021	Save
Ethical Code of Conduct.docx	📑 Private	1 5 Signed ECC from tender process	Ethical Code of Conduct	02/08/2022 02/08/2021 🚱	JUVE
					Create New Action Actions
					Close

To close the Document Storage area you can click *Close* on the menu on the right hand side and this will take you back to the Summary page.

## 9. How to pull reports

Reports can be accessed from the homepage:

In-tend	File 🗸	Project 🗸	Stage 👻	Contracts 🗸	Messages 👻	Administration -	Reports 👻	Help 👻		
<b>1</b>	n-Tend	- Home l	Page							in-community   Report Writer   Help   Site Map
		<b></b>		act Records contract records	you are attached	to.			1	Reports These are standard reports you can use to manage your contracts.
				lier Records all suppliers set	up in the system.				2	Custom Reports Custom reports that have been set up in the system for you use.
← →	្ដ	0 🛛	▲	秴 Home	🖹 Contracts	Correspondence	æ , 🎝 Supj	pliers (	⑦ Help	© In-tend Ltd (2006 - 2022)

- 1. This *Reports* button will take you to a list of standard reports which are available within the In-tend system.
- 2. This *Custom Reports* button is where you can access useful reports that have been set up for you to use. This includes contracts which are due to expire in the next 12 months

Custom Reports are what you will use most frequently. You will receive the 'Contracts due to expire' report monthly via email. However, you can also run reports yourself at any point. To do this, click on *Custom Reports*, this will bring you to the screen below. The reports which are listed as 'Contract Managers Reports' in the description box are those which you can use:

In-tend File - Project - Stage - Contracts - Messages - Administration -	Reports • Help •	
🗉 Report Writer		In-community   Reports   Home   Help   🖶 🗟 🖺
Data Filter: Show All *		Options
Search The Area	Search Clear Search Advanced	Run Report
		Edit Report Remove Report
Area 1 F Title Contracts 1. Contracts due to expire in the next 12 months	Description Contract Managers Report to identify contracts that are due to expire in the	Add
Contracts Contra	Contract managers report to identity contracts that are due to expire in the	Contract Report
Contracts 1. Contracts due to expire in the next 12 months	Administrators Report to identify contracts that are due to expire in the next 6	Supplier Report
		Close
🗲 🔶 🧭 🖾 🧥 👫 Home 🖹 Contracts 🖾 Corresponden	ce 💀 Suppliers 🕜 Help	© In-tend Ltd (2006 - 2021)

To view the report, highlight it and then click *Run Report* on the right-hand side. This will bring you to a page which shows the report on screen.

You can use the functions on the right-hand side to select a contract and navigate to the <u>Contract Summary</u> where you can perform various actions. Alternatively you can export the report into a printable, Excel or CSV file by clicking on the buttons at the top right-hand side of the screen:

omn	nunity   Report Writer   Home   He p   🖶 🖹 量
	Options
	Contract Summary
	Edit Contract
	Close

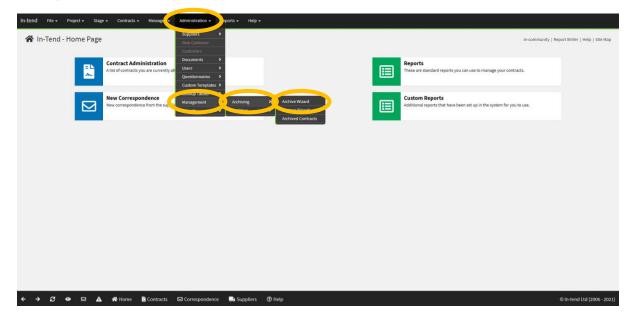
If you feel you would benefit from other reports but cannot see these listed, please email <u>In-</u> tend@midcounties.coop

## 10. How to archive a contract record

You do not need to archive the contract record if you have signed a new one with the same supplier and are simply extending the contract. In this instance you need to just add a contract extension to the record, amend any necessary information, upload a copy of the new signed contract and archive the old document. You can see the guidance on how to do this <u>here</u>. However, if any contract terms have changed then it is best to archive the old record and start a new one entirely.

Once a contract has ended entirely and is no longer valid it needs to be archived. Contracts should never be removed from the In-tend system, only archived.

To do this, you will need to navigate to the Archive Wizard by selecting *Administration* > *Management* > *Archiving* > *Archive Wizard* from the top menu bar as shown below:



This will bring up the below pop-up window where you will need to make sure 'Contract' is selected, then click *Next*:

	Archive or Restore - Microsoft Edge	-	- 0	×
	A https://training.in-tend.co.uk/yourcoop/organiser/aspx/ITForms_Archive.aspx?Action=ARCHIVE&	Mode=View&cl	lear=1&SK:	1193f4
	Archive or Restore			
	Information Type			
	Information Type			
<	Contract			
	Back</td <td>lext &gt;&gt;</td> <td>ancel</td> <td></td>	lext >>	ancel	

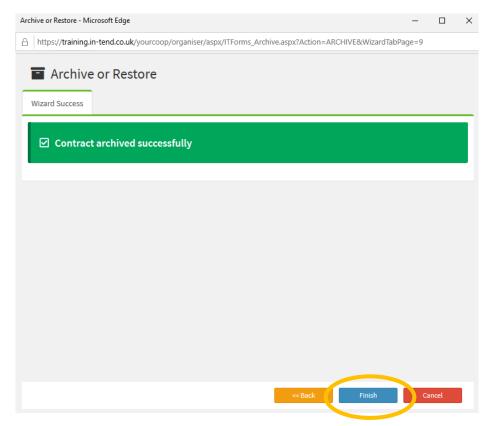
You will need to scroll through the list of contracts to find the relevant one or you can use Ctrl+f to search. Please take care to select the correct contract. You can also sort the contract names alphabetically to help you find it by clicking 'Title'. Once you have found the contract, select this by ticking the box next to the name and then click *Next*:

Archive or Restore			
Select Contract			^
Sort by Title	Description	^	l
Test Contract 004		L	l
Test Contract 002		L	l
Test Contract 001	Audit and security		
Society Uniform Contract	Contract for the provision of uniforms for Food Retail, Travel, Childcare and	~	I
			1

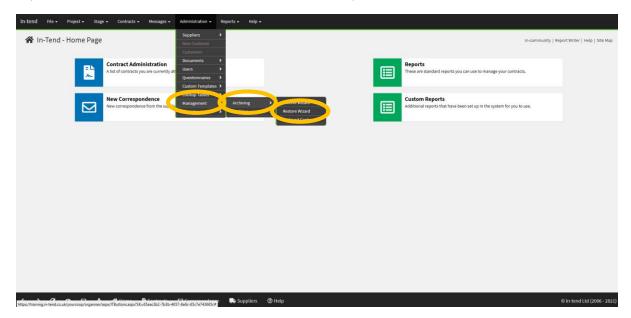
You can then make notes about the reason for archiving below, then click *Next*:

Archive or Restore - Micros	soft Edge —		×
A https://training.in-te	end.co.uk/yourcoop/organiser/aspx/ITForms_Archive.aspx?Action=ARCHIVE&WizardTabPage=7		
Archive Contract	or Restore		
Details			
Contract	Test Contract 003		
Notes			
	<< Back Next >> 0	Cancel	

You will then see the below appear when the contract has been sucessfully archived. To finish, click *Finish*:



The contract should no longer appear in your list. If you wish to view the list of contracts you have archived you can navigate to this list via the same menu. You can also restore any contracts by selecting *Administration > Management > Archiving > Restore Wizard* from the top menu bar as shown below, and follow the same process as above:



## 11. How to archive a supplier record

Archiving a supplier should take place once the contract and relationship has ended and they are no longer a supplier of the Society's. It is important to check the supplier does not have any current contracts listed against them before you archive their record (remember other areas in the Society may still have a contract with the supplier even if you no longer do), you can <u>click here</u> to see the guidance on where to find this information. Suppliers should never be removed from the In-tend system, only archived.

To do this you need to first search for a supplier by clicking the *Supplier* button on the banner at the bottom of your screen:

In-tend	File 🕶	Proje	ct -	Stage +	Contracts -	Messages +	Administration - F	eports + Help +	lp •	
希 In	-Tend	l - Ho	me Pa	ige					In-community   Report I	Writer   Help   Site Map
					Contract Adm list of contracts	ninistration you are currently a	ittached to.		Reports These are standard reports you can use to manage your contracts.	
				1 N	lew Correspo ew corresponde		lier via the web portal.		Custom Reports Additional reports that have been set up in the system for you to use.	
< →	æ	۹		4	🛠 Home	🖺 Contracts		Suppliers	rs Ø Help © In	-tend Ltd (2006 - 2021)

This will bring up the full list of suppliers in the system. You can use the Data Filter bar highlighted below to search for a specific supplier you are looking for by filling in the relevant boxes and clicking the *Search* button:

Data Filter: Show All	¥				Options
Search In	* Supplier	*	Search Clear Search A	dvanced	Supplier Summary
					Supplier Contacts
Supplier	Building Address	Postal Code	Phone Reg	sistered Classification	Add Supplier
Test Supplier 1	Co-operative House	CV346DA	16/	07/2021	Edit Supplier Remove Supplier
Test Supplier 2	Hexagon Business Centre	OX28 4BN	25/	05/2021	Remove Supplier
Test Supplier 3	Midcounties Co-op	CV34 6DA	25/	05/2021	Status
Test Supplier 4	Test	CV346DA	25/	05/2021	Accept Supplier
Test Supplier 5	1 Test Road	TEST1 3LW	25/	05/2021	Reject Supplier
Test Supplier 6	In-Tend House	S60 1DX	27/	04/2021 H	Request More Info
Showing 1 to 6 of 6					Change Status Wizard
					Contracts
					Reports
					Actions
					Document Storage
					Close

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A useful tip if you want to search for all suppliers, is to insert an underscore in the *Search* box, and then click the *Search* button.

Once you have found the correct supplier, click *Edit Supplier* on the right hand menu. This will bring up the pop-up window with the tabs that you will now be familiar with from adding the supplier to the system. You need to scroll half way down the first tab and select the 'Archived' box as below and then click *OK*:

🔒 Edit Supplier							
ddress Contact Details	Individuals Company Ban	king Insurance Other	Accreditation I	Notes Classification	Status History Snapsl	nots	
ounty / State							
ostcode/Zip	TEST1 3LW						
ountry	United Kingdom						
irrency	(None)						
Verification Required							
chived							
Archived							
Archived							
elect the regions you wish to be a	associated with this supplier						

This should take you back to the list of suppliers, where you will no longer see the supplier listed. At this point, the supplier will automatically lose access to the web portal.

If you require the supplier re-instating, please email <u>In-tend@midcounties.coop</u>

## 12. How suppliers use the web portal

The user who sets up the supplier on In-tend as part of the 'adding a supplier' process will need to issue the log in details to their supplier contact, you can revisit the steps on how to do this <u>here</u>. Users can refer to the **Supplier In-Tend Communications Template** for guidance on this and should also issue the **Supplier In-Tend User Guide** to the supplier.

The supplier will need to change their password when they first sign in. Moving forward, the supplier can use the 'forgotten password' function on the web portal or you can reset their password on the 'Individuals' tab on the Supplier record.

When the supplier logs into the system they will need to insert their username and password to log in on the right-hand side of the page.

Login	
Email Address	
Password	
Login	Forgotten Details

Once the supplier is logged in they may see some information regarding tendering opportunities on the web portal. These elements should be ignored at present. Unfortunately, we don't have the ability to hide them. The In-tend system has extensive functionality for tendering, but we are not using this at this moment in time. We are focussing first on uploading our contracts for visibility and enabling our colleagues to use the system confidently. The other elements of the system will be considered in the future.

The main functions the supplier can use are highlighted below, which are at the top of the page when the supplier logs in:

# Home	A Buyers Profiles	Messages	Tenders	Contracts	Company Details	<b>9</b> Help	🕒 Logout

**Messages** – this is where they can view, reply and send any correspondence to you via the Intend system. The system will send you a notification via email when a correspondence is sent.

**Contracts** – when the supplier first logs into the system, it will ask them to confirm receipt of the contract. Here, the supplier can see the contract record and documents you have given

them access to. They can navigate through the tabs at the top of the page. The below shows the *Contract* tab, where they can view the high-level information you have inserted into the contract record:

est Contrac	+ 002
	1002
Please note: A	Il date & time fields are being displayed using (UTC +01:00) GMT Daylight Time
Title :	Test Contract 002
Reference :	Yourcoop/C/0022
Contract Value :	1000000
Currency:	Pound Sterling (GBP)
Supplier :	Test Supplier 4
Customer :	1. Midcounties Coop (Society Wide), 5.1 Coop Childcare (ALL), 5.2 Coop Food (ALL), 5.3 Coop Funeral (ALL), 5.6 Coop Travel (ALL), 4.3 Support Services - (ALL), 4.3.3 HR - Resourcing, 4.3.1 HR - Colleague Relations, 4.3.2 HR - Learning and Development, 5.2.1 Coop Food - Commercial Partnerships, 5.2.4 Coo - Store Operations, 5.2.2 Coop Food - GFR, 5.1.1 Coop Childcare - GFR, 5.3.1 Coop Funeral - GFR, 5.5.1 Coop Travel - GFR, 5.5.2 Coop Utilities (ALL), 5.7. Coo Utilities - GFR, 5.5.1 Coop Rewards - GFR, 4.8 Support Services - Property (ALL), 4.8.6 Property - Property Manageme Support Services (ALL), 5.4 Coop Pharmacy (ALL), 5.4.1 Coop Pharmacy - GFR, 5.5.2 Coop Childcare - GNFR, 5.2.2 Coop Food - (5.3.2 Coop Funeral - GNFR, 4.8.4 Property - New Store Development, 5.4.2 Coop Pharmacy - GNFR, 5.5.2 - Coop Childcare - GNFR, 5.2.3 Coop Food - (5.2.2 Coop Funeral - GNFR, 4.8.4 Property - New Store Development, 5.4.2 Coop Pharmacy - GNFR, 5.2.2 Coop Childcare - GNFR, 5.2.2 Coop Travel - (5.2.2 Coop Tuneral - GNFR, 4.8.4 Property - New Store Development, 5.4.2 Coop Pharmacy - GNFR, 5.2.2 Coop Travel - (5.7.2 Coop Utilities - GNFR, 5.1.7 ading Groups (ALL), 4.2.4 Finance - Procurement, 4.2.5 Finance - Tax, 4.2.2 Finance - Banking, 4.2.1 Finance - Audit, 4.2. Finance - Bonds and Shares, 4.4. Support Services - IT, 4.6 Support Services - Marketing, 4.7 Support Services - Colleague Engagement 4.8.7 Property - Utilities, 3. Environmental Services (Society Wide), 2. Consumables (Society Wide), 4.1 Support Services - Colleague Engagement
Main Contact :	Shani Knight-Cross
Expiry Date :	01 September 2021
Category :	Non External Journal
Туре:	Unspecified
Contract Start Date :	01 July 2021
Contract	01 September 2021

The *Documents* tab is where they can view, download, access the history of and upload any new documents to the contract record.

ome	💄 Buyers Profiles	🖂 Messa	ges 🖹 Tenders	Contracts	<ol> <li>Company Detail</li> </ol>	s 🛛 Help	🕞 Logout
ontract	t Mana						
Corra	ct Documents	Corrispo	ondence				
Docu	ument Title	Area	Status	Expires	Date Added	Туре	Options
Test	Contract.docx	Private	Document available	Never Expires	01/Jul/2021	General	View Download History
	ad Company Docume	ent					
Type:			General				$\sim$
Expiry	Date:		General				×
	/ Date:			iment			<u> </u>
Expiry	r Date:			ment			<u> </u>

The *Correspondence* tab allows the supplier to send correspondence to you via the web portal, in the same way as the Messages section on the main banner at the top of the page.

**Company Details** - here, the supplier can update their details, and this will feed through to Intend. This is also where the supplier can change their own password. To do this they will need to click on *Contact Details* and then select the contact from the dropdown list to change their password in the highlighted field below, and then click *Save Contact:* 

Company Details Details Details Documents Business If you would like to Edit an existing C	: Categorier Contact Details ontact, please select one contract nan	e from the Dropdown Menu.	
		e from the Dropdown Menu.	
If you would like to Edit an existing C	iontact, please select the contact nan	e from the Dropdown Menu.	
Contact :			~
Title :			
* First Name : Test Fir	stname		
* Surname : Test Su	rname		
Telephone : 01234	56789		
Fax:			
* e-Mail: email.t	est@midcounties.coop		
* Confirm Email : email.to	est@midcounties.coop		
Mobile :			
Job Title :			
Department :			
Office :			
* Password :	•		
Confirm Password :			
	copy of all e-Mails to this user end contract correspondence		
Key: "Mandatory			Remove Contact Save Contact

Remember, once a supplier has been archived on In-tend by a user (you can revisit the guidance <u>here</u>) they will automatically lose access to the web portal.