



# **User Guide**

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# 1.0 Introduction to VendorPanel

Local Government Corporate Services (LGCS) is owned by the Local Government Association of South Australia and operates as a business unit of the Corporate Services Group.

LGCS is utilising an innovative online gateway for accessing a range of LGCS approved suppliers. This portal is powered by VendorPanel.com and offers council users an easier, faster and more targeted way of selecting the best available suppliers with the confidence and security of drawing from the pool of LGCS pre-selected panel suppliers.

Some key features of VendorPanel include:

- The system is automated allowing approved suppliers to receive notification of new requests from council and submit responses via the online portal. Councils can interact with suppliers through the system and all proposals are managed and stored in the system
- There is a standardised response format that allows for easy comparison between suppliers
- A quick PDF summary extracts all details of the requests, responses and evaluation making it easy to demonstrate a sound and responsible competitive s3ourcing process. The system logs the process so it ensures council staff can meet governance and probity requirements

# 2.0 Getting Started

#### 2.1 Registering on VendorPanel

Your council requires a personal invitation to access VendorPanel and the LGCS panels. If you have not already received this invitation which would have been sent to you by VendorPanel.com, please contact Diane Harris on <u>diane.harris@lga.sa.gov.au</u> to be set up with an account.

Each council will receive one invitation that will be sent to the nominated key contact, who will then be able to invite colleagues to the system. This person, on accepting the invitation, will become your Council's "Administrator". The Administrator is then able to invite other staff within your Council to become "Buyers". If you require additional "Administrators", you need to contact Diane Harris who will then be able to assign additional Administrator rights to the correct person(s) within your Council.

The invitation will contain a registration link where you can follow the prompts and complete your profile.

The information provided here can be used in Request for Quotes (RFQs).

#### 2.2 The homepage

		vp.demo4@gma
INFORMATION	MY REQUESTS	SHOWALL (S ADD NEW)
Your local group	Staff Reward & Recognition program	
You belong to the Threeville Council local group. Your administrator is Laura Matthews	✓ Closing: 15-Jun-11 5:00 PM	< ▲ ● ♥ 业 >
Recommended activity	Industrial Relations Mediator required to help re	esolve dispute
Requests with unactioned responses     Vendor questions to answer		
Supplier List Information	Box Culverts for Road Upgrade	
Supplier lists you can access	Closing: 16-Jun-11 5:00 PM	<ul> <li>(A) (A) (A) (A) (A) (A) (A) (A) (A) (A)</li></ul>
Status		
None		
Your timezone		
<ul> <li>Australian Eastern Standard Time [UTC +10]</li> </ul>		

Figure 1: Home page

Once registered, you can access VendorPanel. It is recommended that you get a feel for the system by creating a test request under the "My Requests" button on the toolbar. A wizard will walk you through the process of creating a request but if you get stuck on anything, just place your mouse over the question mark in the bubble to get more information. This will give you the opportunity to see the entire process through in a test environment (i.e. the request sent and responses received are dummies).

To send an actual request to vendors on the LGCS panel, select "Create a new request". Be sure not to get this and the test request mixed up!

My Requests My Account FAQ's		vp.demo4@gm
MY REQUESTS		
All your requests		> ADD NEW
Staff Reward & Recognition program	Closing: 15-Jun-11 5:00 PM	<ul> <li>(A) (B) (B) (B) (B)</li> <li>(A) (B) (B) (B)</li> <li>(A) (B) (B) (B)</li> <li>(A) (B) (B) (B)</li> <li>(B) (B) (B) (B)</li> <li>(B) (B) (B) (B)</li> <li>(B) (B) (B) (B)</li> <li>(B) (B)</li></ul>
Industrial Relations Mediator required to help resolve dispute	Closing: 30-Jun-11 5:00 PM	Q 🔊 📾 🛱 🖬 🔈
Box Culverts for Road Upgrade	Closing: 16-Jun-11 5:00 PM	<ul> <li> (1)</li> <li>&lt;</li></ul>

Figure 2: My requests

# 3.0 Completing an RFQ

To send an RFQ to Supplier(s) you need to complete certain information. To do this, go to "My Requests" and click on Create a New Request. You are also able to run a test request from the "My Requests" tab.

Figure 3 shows each of the 9 simple steps on the left hand side that need to be completed.



# 4.0 Supplier notification

You are able to select the supplier(s) that you wish to contact to supply you with a quotation.



Figure 4 – select suppliers

You are able to de-select those suppliers under the category that you **do not** wish to have provide you with a quotation or select all if you wish to receive from the range of suppliers. (see Figure 4).

**NOTE -** if you select less than 3 suppliers, the next screen after saving the vendors will issue a warning that you have selected less than the default number of suppliers. You are able to move forward to the next screen if this is not an issue or go back to the previous screen and select more if you are required under Council policy to receive three or more quotes or if you believe you would like to issue additional requests.

When a request is posted, the panel suppliers that have been selected will receive an automatic email notification and a link to the RFQ. Suppliers will submit responses via the system and you will be notified once it has been submitted.

Through VendorPanel, you are able to view whether a supplier has reviewed or responded to your request (see Figure 5). You can do this by clicking on the graph icon next to the request (see figure 2).

Vendors notified for this request			
VENDOR DETAILS	NOTIFIED	DATE READ	VENDOR RESPONDED
1: a C ABC Human Services	🗸 Yes	✔ 24-May-11 12:20 AM	O Declined to respond
2 : Comega HR Consulting	🗸 Yes	✔ 24-May-11 12:22 AM	24-May-11 12:23 AM
3 : Austral Axis HR	🗸 Yes	✔ 24-May-11 12:25 AM	🞺 24-May-11 12:29 AM
4 : Persture First Line Consulting	🗸 Yes	✔ 24-May-11 12:15 AM	🗸 Reponse in draft

Figure 5: Request details - statistics

## 5.0 Request options

By clicking on the orange arrow to the right of a request, you are able to select a range of Options:



Figure 6: Request options

#### 5.1 Edit this request

You can make changes to your RFQ at any time before the closing date by selecting "Edit this request" (see figure 6). Navigate your way through the wizard to the area you wish to change and when you're done, VendorPanel will confirm the changes made. It is recommended you enter the details of any changes made so the panel are aware.

#### 5.2 Make a copy

You can save time by selecting "Make a copy" to use the same information as a previous RFQ. You can still go through the wizard to make changes wherever appropriate.

#### 5.3 Delete this request

If you decide that you no longer need a request, you have the option of deleting it. A message will prompt you to confirm your decision to delete the request. Once a request is deleted, it cannot be undone. A request can only be deleted prior to posting to suppliers.

#### 5.4 Transfer to another user

If you are going on leave or leaving the organisation, you can transfer the request to another user. Transferring a request can be done on a temporary or permanent basis.

#### 5.5 Show on (Hide from) my homepage

This allows the user to determine which requests are displayed on their homepage. Selecting "Hide from my homepage" for any requests you want to remove from the homepage (you can always bring them back by going to the 'My Requests' page and clicking on 'Show on my homepage').

#### The Other icons represent the following:

9	View your request.
	View responses received – a green icon indicates that responses have been received.
	View documents attached to the request.
1	Download a zip folder with the request and all responses received (including attachments).
(LL)	View statistics for the request – suppliers notified, who has read the request and whether the suppliers have responded.

# 6.0 Selecting successful suppliers

INFORMATION	MY REQUESTS	SHOWALL S	NEW OOL
Your local group	Staff Reward & Recognition pro	igram	
You belong to the Threeville Council local group. Your administrator is Laura Matthews	✓ Closing: 15-Jun-11 5:00 P	M ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) (	
Recommended activity	Industrial Relations Mediator re	quired to help resolve dispute	
Requests with unactioned responses     Vendor questions to answer	Closing: 30-Jun-11 5:00 P	M 🔍 🔊 👘 👪	
Supplier List Information	Box Culverts for Road Upgrade	3	
Suppler lists you can access	✓ Closing: 16-Jun-11 5:00 P	M 🔍 🔍 🖉 👹 👪	
Status			
<ul> <li>None</li> </ul>			
Your timezone			

Figure 7: Requests with unactioned responses

Once the RFQ has closed, you are now able to evaluate the responses received. Select "Requests with unactioned responses" as highlighted above and select on the green icon to view the responses.

	Add notes	·
REBEL ALLIANCE GROUP. (info) Posted : 26-May-11 2:26 PM	YOUR DECISION 0.notes 🕏	Select
	⑦ Undecided (decide by 09-Jun-11 09:25 PM)	Decline
DARK SIDE INC. (info)	YOUR DECISION 0 notes 😏	Select
Posteci 26-May-11 2:26 PM	⑦ Undecided (decide by 09-Jun-11 09:25 PM)	<ul> <li>Select</li> <li>Decline</li> </ul>
SPACE EXPLORERS INC. (info)	YOUR DECISION 0 notes 👁	Salact
<ul> <li>Rester : 204 May-11 2:20 FW</li> <li>Bit (1) (2) (2) (2) (2) (2) (2) (2) (2) (2) (2</li></ul>	⑦ Undecided (decide by 09-Jun-11 09:25 PM)	<ul> <li>Decline</li> </ul>

Figure 8: Responses received

You will then see a screen similar to figure 8. Choose "Select" or "Decline" as appropriate for each response. It is recommended you provide comments when choosing to select or decline a supplier's response, private notes only visible to you can also be recorded.

By clicking on the small bubble with the plus sign on it, you are able to add notes to each response. These notes are not visible to the vendors and are a good way for you to make quick points about each response.

The third icon below the vendor's name gives you the option of downloading that particular vendor's response rather than all the responses received.

**NOTE:** Once you have accepted or declined a quote, an automatic email will be sent to the supplier advising them of the decision.

# 7.0 Downloading summary reports

By clicking on the icon associated with the request, you can download a PDF report summarising your request and the responses received from suppliers. You have the option of password protecting the downloaded folder but if you do not wish to use a password, just click the "Download" button.

Download Request Package	X
MY REQUESTS         Download a request package for 'Workshop on leadership / influencing skills for procurement staff'         This feature allows you to download and save everything (and print) to do with this request (including any attachments, all responses and their attachments and any panel documents) to your computer in a ZIPPED format.         If you would like to 'password protect' this file, enter your desired password below. (We recommend you DO NOT use your login password)         Download	×

Figure 9: Downloading summary reports

The details of your request and the responses received can be printed out and kept for internal council records. All requests made will also be archived in the VendorPanel system.

# 8.0 Local Group Manager (LGM) access

INFORMATION	ADMIN TOOLS	
Your local group	Quick Links	
You belong to the Demonstration Council local group. Your administrator is Chestine Ong	<ul> <li>Manage buyers (1)</li> <li>View Reports</li> </ul>	
Recommended activity		
► None		
Supplier List Information		
Supplier lists you can access		
Status		
► None		
Your timezone		
Australian Eastern Standard Time IUTC +101		

Figure 10: Local Group Manager homepage

There will be at least one council user set up as a Local Group Manager in VendorPanel which provides administrator rights. As a LGM, your homepage will be similar to those of buyers but with the added function of "Admin Tools" (see figure 10). With this function, LGM's can invite and manage other council users of the system (buyers).

		> Manage buyers	(1)			
ADMIN TOOLS		> View Reports				
lanage Buyers						
<ul> <li>Browse all</li> <li>Get buyer links</li> </ul>	Browse All					
	( ADD NEW )	OUP CREATED	ADMIN/MGR S BUY	ERS INVITED		
	1: ₩₩ Demonstra	tion Council 21-Sep-11			>	

Figure11: Managing buyers

By selecting "Manage buyers" under the Admin Tools dropdown box, LGM's can invite other users from their council in to the system to create and view requests.

Browse All				SHOW CURRENT USERS Administrators Buyers Invited INVITE NEW USERS	
LOCAL GROUP	CREATED ADMIN/MGRS	BUYERS	INVITED	Buyers	
1: MM Demonstration Council	21-Sep-11 0	1	0	5	

Figure 12: Inviting buyers

To invite buyers to the system, click on the orange arrow and under "Invite New Users", click on "Buyers". You will then see a screen as shown in figure 13.

Browse all Get buyer links	Add Buyers to the 'Demonstration C Approximately how many Buyers would	ouncil' Local Group you like to invite?
	Please enter the contact names and emai Started' email will be sent to each, inviting	I addresses of up to 5 buyers to add to the <b>Demonstration Council</b> local group. A them onto this local group.
	CONTACT NAME	EMAIL ADDRESS
	1	
	2	
	3	
	4	
	5	

Figure 13: Adding buyers

You can add other users by filling out the form with their name and email address. When you are done, click on "Validate list" and VendorPanel will validate the email addresses you have entered. From there, click on "All OK – send invitations?" and the invited buyers will receive an invitation to register with the system.

Once they are registered, you will see the number count as in Figure 12 change accordingly, from "Invited" to "Buyers". The invited buyers will then be able to create new requests in VendorPanel.

Administrators also have the option of approving all RFQs and answers to supplier queries before they leave the system. By default, this option is turned off, so if your council would like the administrator to have this function, please contact <u>diane.harris@lga.sa.gov.au</u>

## 9.0 Locked Box Functionality:

Once you have sent out an RFQ, you are able to either receive quotations and download as they are received in or alternatively, you can lock the system so that all quotations are only able to be viewed after a set closing date and time.

By default, this is turned "off" within VendorPanel, which means that responses can be read and downloaded as soon as they are received, and not prior to the closing date. However, Council can elect for the "Locked Box" function to be turned "on".

If the "Locked Box" function is turned "on":

- It applies to all requests for all users in VendorPanel for that Council;
- Council will be able to see who has responded to a request, but will not be able to open any
  response until after the closing date. The default time is close of business on the selected
  closing date.

Before a decision is made that the "Locked Box" function is to be turned "on", all VendorPanel users within Council should be consulted to discuss the implication of this decision.

In addition, should Council elect to turn "on" this feature, any existing open request will take on the "Locked Box" feature with immediate effect, e.g. responses to existing RFQ"s will not be able to be reviewed until after the closing date.

Equally, should Council choose to turn off the "Locked Box" feature, existing open requests with responses will be able to be read and downloaded immediately.

If Council wishes to turn this feature "on" or "off" please contact diane.harris@lga.sa.gov.au

# 10.0 Contact us

This guide provides council users with the basics of operating the VendorPanel system. Should you encounter any problems with using VendorPanel, please contact either LGCS or Magnetized Markets at the details below:

#### **Operational issues**

**Diane Harris,** Local Government Corporate Services

T: 08 8224 2013 E: diane.harris@lga.sa.gov.au

#### **Technical issues**

Magnetized Markets T: 03 9095 6181 E: <u>support@vendorpanel.zendesk.com</u>