

Supplier Adoption and Economic Development (Strand 5)

What is a Supplier Portal and what should it do?

A detailed guideline

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Detailed Guideline: What is a supplier portal and what should it do?

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1. Supplier Portals - an introduction

The Better Regulation Task Force (*Government: Supporter and Customer? – May 2003* and now accepted by government as policy) recommends that central government departments should provide a “supplying Government” web portal and that local authorities should have “selling to the council” pages on their website. These are expected to have certain features, including self-registration for suppliers and notice of forthcoming contracts.

This passive ‘advertising board’ is sometimes described as a Supplier Portal. However, the full capability of a Supplier Portal is far greater. It becomes a ‘door’ through which the supplier can exchange information with the Council and offers interaction between supplier and buyer. It should be seen as a part of any e-procurement system, linking the sourcing activity of a council to the transactional processes.

This detailed guideline aims to provide a basis for Local Authorities to design and implement a Supplier Portal based on best practice, which will enable supplier adoption and to provide benefits to the supplier community.

The first step, of course, is to create the ‘Selling to the Council’ web pages. For guidance on this see **KEY QUESTION 3: How can I get suppliers to commit to e-procurement?**

2. What a Supplier Portal should do

2.1 For suppliers

- Businesses who want to trade with councils should be able to register their details online
- They should be able to find information and links on the portal that enable them to acquire the e-commerce capability to trade electronically with the council, which means that buyers, having found them, have direct access to their catalogue or service offering and can immediately trade online with them - includes merchant accreditation etc for GPC trading
- An integral part of their registration online should be the acquisition of the basic level pre-qualification accreditation that is being made standard by government and will be recognised by councils and central government, instead of having to go through that process with each prospective buyer department – increasingly this will also be recognised as the standard by corporate buyers in the private sector
- Higher level pre-qualification should then be available as and when stipulated to bid for specific higher value/risk contracts
- Registration should mean that the potential supplier is made visible to buyers who ‘subscribe’ to the service (see below) and to the rest of the world via the web search engines
- Companies that need to find out how to comply with the pre-qualification requirements should find links to the relevant information, guides and templates to help them complete the requirements and links to service providers who can provide low-cost solutions eg 3rd party liability insurance
- Registration should mean they can have notices of forthcoming tenders and planned work information emailed to them (‘push’), automatically based on their profile or filtered as they stipulate – not passively waiting for them to access the pages on the web portal (‘pull’).

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2.2 For buyers

- Councils should have 'How to trade with us' web pages tailored to their own look and feel and accessed via their own home page
- Buyers should be able to register their tenders and planned work (as per new government policy)
- They should be able to gain access to suppliers who are local (if that is a council priority) and accredited, by keyword or by other search criteria
- The council should use a standard set of supplier qualification criteria for higher risk contracts, possibly via an external service
- When buyers need a supplier they should be provided with a list of accredited suppliers ahead of any others. The mechanism for 'pushing' this to them might be part of the e-procurement system or they should be able to access the supplier information via their own website home page or intranet
- Councils may wish to provide their community with online access to the supplier information as a local business directory (i.e it defaults to the local supply community but can extend to search regionally and nationally).

2. Self-registration

The 'Selling to the Council' web pages should ideally have some way that suppliers can register their interest in trading with the council. However, many currently do not include this feature. The fully interactive Supplier Portal should offer them the ability to register and maintain their details, products and services in an intuitively easy way, requiring no special skills or technology beyond access to the council's website.

This includes their email address so that you can keep suppliers up to date with developments – see below.

- On line Registration - completion of details online including confirmation once details have been submitted.

3. A source of help, information and links

Suppliers should be able to look on the portal for information on what the council expects of them and help in acquiring these capabilities. This should include:

- The basic information that should appear on any 'Selling to the Council' pages, such as:
 - Terms and conditions - the LA's standard terms of procurement and a link to a published purchasing policy
 - Accreditation standards - what standards are needed to qualify for various categories
 - Tender process - indication of the council's tender workflow principles and practice
- Information, guides and templates to help would-be suppliers complete the pre-qualification requirements and links to service providers who can provide low-cost solutions eg 3rd party liability insurance
- Links to a simple, low-cost route to e-commerce, including online catalogue uploading, if appropriate (Request for Quote handling if not), merchant accreditation for GPC trading, e-

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invoicing, e-payment etc. Bristol and some other councils are using @UKPLC for this – see the Supplier Adoption Case Study section on this site for more information

- Links to other useful sources of information and support for business process re-engineering as well as the technical aspects - such as UK Online for Business and the local Business Link

4. Down- and upload of pre-qualification, tender and contract documentation

It is cheaper and easier and more efficient for the council to publish documents on the web, rather than mailing them. Suppliers need to be encouraged to receive and issue documents via this mechanism too. The Leeds LETS experience is that this takes time and effort both with suppliers and within the council.

This might include:

- Pre-qualification documentation or an online self-registration capability. Pre-qualification document management is discussed as part of the detailed guideline: **Towards standard pre-qualification** published on this site. Suffice it to say here that simple self-registration of a company's in principle capability to provide the documentation may be sufficient until they are actually short-listed
- New tenders - an area where new tenders can be downloaded with links to application or registration of interest
- Prime contractors - where the provision of goods or services is outsourced a list of prime contractors and their contact details should be shown (so that smaller local companies can find out about potential sub-contract opportunities).

Contracts above the EJEU threshold have been available on the web for some time. Companies such as BIP and Tender Direct take a commercial approach to this opportunity. These companies will, for a fee, send an electronic alert to registered suppliers of tenders placed in the Tender Electronic Daily TEDS system that meet the pre registered requirements of the supplier. The BRTF report highlights the need for contracts of lower value - that is beneath EU thresholds - to be made more accessible to small firms, so they can establish a foothold in the public sector.

To meet this recommendation the BRTF suggest that information on contracts for tender, forthcoming contract opportunities and guidance on how to do business with the council are available on-line from the Council portal or website. The aim as recommended in the report is for this to be available by 2005 and it is this area where most attention will be needed.

The Local Authority must define the elements that will be published and made available, and assign roles and responsibilities to build and maintain the information on-line. For example, the Better Regulation Task Force suggests a contact name for each tender. The Local Authority must develop some process to manage this and rules to dictate who will be responsible for carrying out the work, the method of contact acceptable (phone, e-mail) and how to add this information to the portal. If this information changes someone must be responsible for changing the data on the portal or website. A maintenance process must be established.

The more a Local Authority offers to share online, the more the information must be maintained. Thought must be put into the knowledge management behind the portal.

However it is pointless leaving this information on a website and not informing the supplier community that it is there, or that it has changed. The Supplier Portal should use the registered

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supplier details to identify which suppliers might be interested in a forthcoming contract opportunity and make sure they get to hear about it. This will use the self-registration process to enable suppliers to build their profile and identify what they provide and in what kind of work they are interested. This populated list can then be used to 'push' information such as new tenders to them when new items appear or alert them to look on the portal website.

To provide this functionality the portal software needs to incorporate a 'rights' model that drives the supplier database with rights to add, edit, publish and read material.

5. Visibility of supplier to buyers

Let's not forget that whatever is provided to suppliers in the way of information and notice of tenders and planned work will require the active involvement of buyers. They will be reluctant to undertake the work unless they are also getting something out of it, such as easier access to a source of quality suppliers.

So buyers must be able to link to the portal to gain rapid access to relevant suppliers who are local (if that is a council priority) and accredited, by keyword or by other search criteria. This might be provided as part of the e-procurement system – a buyer decision tool which does this is being prototyped so that it can be specified in future to service providers – or on a stand-alone basis online (eg Constructionline) or on CD-ROM (Exor).

We should also not forget that buyers are very nervous about opening the flood-gates and being deluged by lots of suppliers bidding for work, adding to their sourcing workload. This is one important reason for incorporating pre-qualification into the Supplier Portal capability. It should also be possible to short-list suppliers from the portal if the portal is joined up to the e-procurement solution, so that should be the longer-term objective for all councils.

One of the incentives for suppliers in undertaking the investment in e-technology has to be the hope that they will retain council business. In practice this is far from certain, especially in the context of e-procurement streamlining and rationalisation and it is important that the council's proactive approach is not interpreted wrongly by suppliers. However the council can help others to find the company's website, and boost the company's opportunities, by sharing their accredited supplier list with other local public sector bodies, private sector corporations and even local residents and smaller businesses via a local business online directory. Bristol suppliers that are going online to trade with the council are now also on a national online database of more than 30,000 companies that can be searched locally, regionally or nationally. Many councils already publish a local business directory so it may be valuable to integrate this with the Supplier Portal initiative.

6. A structured approach

Implementing a Supplier Portal needs a structured process , such as:

Step 1: Take stock of back office applications and databases. Take time to understand and map the workflow of the information required for the portal or website. This step is about understanding what is

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being done today in your user community. If they have solutions to their problems that can fit into the portal then adoption is better than attempting to force new workflow onto user groups.

Step 2: Prototype and test the capabilities of the portal software and how its use can improve the workflow and information management established in step 1.

Step 3: Capture any additional requirements and ensure that the solution architecture is scaleable and robust enough for the usage it will receive.

Step 4: Look to the future. The ultimate goal of e-procurement is an integrated procure-to-pay system, where suppliers and buyers can track contracts, purchases and payments online. How will your proposed solution adapt and evolve to meet these aims in the future ?

Step 5: Take time in planning and deployment. Make sure internal responsibilities are clear and that the staff managing the portal understand their new roles. Roll out training to users and explain any elements of new workflow and responsibilities.

For external users the workflow and the design of the screen is very important. Clear signposting and useful links do not happen by accident. Good design takes time and an element of trial and error. Area for feedback from users should be included to learn what users like and dislike.

If the intention is to start with a simple set of 'Selling to the Council' web pages and then to develop this into a fully featured Supplier Portal, that strategy needs to be clear from the start so that the migration from passive to interactive is understood and any necessary design features built in from day one.

NEPO (North East Purchasing Organisation) have recently contracted to have built a fully featured Supplier Portal that links to their e-procurement system, having spent some time and effort creating a less ambitious 'passive' version and learning from this experience. That is a sensible approach which ensures that the final system will do what you want it to do. It can save a lot of problems later on and it is to be recommended.

7. Conclusion

There is no doubt that simplifying the engagement by suppliers with the local authorities will improve supplier adoption and increase participation in electronic marketplaces. By allowing suppliers access easily to relevant information, local authorities will encourage the participation of good local suppliers.

When combined with accreditation activity and training, a clear and transparent tender process and performance evaluation an interactive Supplier Portal can allow collaboration to take place that previously in a paper based process would have been too cumbersome and expensive to maintain.

The goal of the Better Regulation Task Force of increasing the spread and usage of best value local companies below the EU thresholds will be delivered by the considered adoption of Supplier Portals. Good design and maintenance management will ensure the adoption by the user community of buyers and suppliers.

8. Some Examples

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Many Local Authorities already have 'Selling to the Council' web pages, for example St Helen's www.sthelens.gov.uk which provide the passive information. Some Local Authorities have links to downloadable guides to help potential suppliers engage with the authority. www.birmingham.gov.uk. NEPO has a supplier register and notification of forthcoming contracts: www.nepo.org. We did not identify any examples of local authorities operating the 'push' mechanism to alert companies about new opportunities.

However, the OGC has a web portal that allows suppliers to register interest in central government supply opportunities and a contract alert service that informs registered suppliers of relevant opportunities. www.supplyinggovernment.gov.uk

The Welsh Assembly has a similarly proactive site: www.winningourbusiness.wales.gov.uk

Haringey has created a database of suppliers that have passed some accreditation after having passed through a training programme to better prepare them to bid for Local Authority business. Sign-up is available from the council website e.g. www.haringey.gov.uk but this does not currently link them automatically to tendering opportunities.

There are services available to register suppliers on more than one authority offered at www.sopo.org, which makes their SELECT database available to SOPO members across Local Authority boundaries.

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Technical Specification of a Supplier Portal

Feature	Benefit
Administration	
Site administrator(s) set-up, authorisation, and password controls	Security and integrity maintained by authorised users with correct rights and roles to monitor and maintain the content and use
Maintains registration agreements, privacy policy, and other site legal information	Persistent messages regarding legal requirements, disclaimers and warnings maintained in one place
Content management	
To both authorised groups and individuals the software will provide self-publishing permissions	Users with rights and authority can add, edit and maintain the content for their part of the portal.
Users will be provided with easy-to-use forms with 'Help Pages' to minimise training time and cost	Easy to use cutting training costs and calls to help lines and support desks
Self-publishing to be available for content management, maintained by authorised users in real-time	Real time changes allow new and up to date information to improve users satisfaction reducing frustration at out of date information.
Date sensitive listings are removed from the site automatically	No need for users to have a removal process that monitors out of date information the system removes date sensitive issues on time automatically reducing user frustration and clogging the site with old information
Content browsing	
Users can filter the site content to display only the areas of personal interest or relevance	Users can build their own user experience around some mandatory content
Users can quickly browse their personalised content	Users can find add edit and maintain their own content with few clicks or screens to navigate
Users can easily change their personalised content selections	As users change roles or jobs they are able to re build their content selections.
User management	
Comprehensive site registration form	One point of registration for users

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Allow user to choose grouping categories	Users can choose which category of user they belong to and receive and view relevant content
Registered users can self-edit their log-in, profile, and other personal information	Self maintained details reduce administration overhead
Automated Forgot Password system	Self administered reminder system cutting admin overhead and calls to support desk
Enables the administrative controls for self-publishing content privileges	Registration dictates which areas can be viewed and changed
Enables site content personalization tools	Access to tools to personalise user experience. Tools must be easy to use and self-explanatory.
News Publishing	
Combines content creation, graphics, and publication controls	Authorised users can use approved content to create the portal content
Dynamic news sections	Some areas will be static others will be refreshed at set times , daily , weekly monthly or dynamic feed where necessary
Allows related Web links	Links to affiliate and sites of interest
Authorised contributing writers can submit stories for editorial review and publication	Authorised users compile content and submit through approval process before upload to portal
Listings to be self-published and maintained by authorised users in real-time	Real time maintenance of listings to remove old outdated material and add new material. Reduces user frustration and improves confidence in the content eliminating phone calls and emails to verify information.
Directory software	
A directory listing to include a graphic, address; contact information, site link, and large description. A listing can be associated with (classified by) multiple categories	Registration allows users to enter details for their business and classify their activity for search purposes with links to their own sites where appropriate
Users can quickly find listings using powerful, quick searches	Listings can be searched by name category location
Listings can be submitted by the site's audience for administrator review and approval	Proposed entries can be reviewed as apart of an approval process

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Listings to be self-published and maintained by authorised users in real-time	Real time changes to the listings can be maintained by authorised users with view edit add and maintain rights.
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Content examples	
<p>Home Page</p> <p>For all users the home page should not hold specific content but serve as a guide to the portal content</p>	The main purpose of the home page is to provide an area of simple navigation
<p>Supplier Area</p> <p>Suppliers can access information area to help them trade with the council. To include:</p> <ul style="list-style-type: none"> • Links to acquire capability to trade electronically • Online registration including confirmation • Access to templates and forms to acquire basic level accreditation • See forthcoming tenders and planned work information. • Ability to subscribe for email alerts for the forthcoming tenders • Registration will give visibility with buyers • How to trade with the council guidance 	Speed and smooth the adoption of suppliers into trading with the council
<p>Internal catalogue</p> <p>Where the authority has built an internal catalogue access for authorised users should be through the portal</p>	Links to the internal catalogue single sign on should include spend limits and track user activity including cost centres
<p>Contracts Database</p> <p>Database of current contracts will be available to users to access to support their purchasing decisions</p>	A searchable database of contracts will inform the users of where contracts have been awarded. This reduces off contract spend and therefore cost. This could be linked to an e-procurement system to automatically flag where contracts exist
<p>Common Documents</p> <p>Access by authorised users to common documents through the portal</p>	Avoid replication of effort when the document the users need have already been drafted and approved.
<p>Diary of events</p> <p>Users with the authority will be able to add entries to the diary indicating if other users need to be invited. Invited users will be</p>	Improved collaboration between users and visibility of activities around the LA to improve co operation and co-ordination

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notified by email of the entry.	
<p>Contact us</p> <p>Telephone and or email details and responsibilities can be accessed by the users</p>	<p>To improve contact flow and to manage contacts clear indications of who to talk to or email for different categories of work should be available through the portal</p>
<p>Feedback</p> <p>This will allow users of the portal to provide feedback to the users management teams; each piece of feedback will be recorded and saved.</p>	<p>Online queries and concerns can be traced and tracked and saved for comment</p>
<p>Marketplace (where applicable)</p> <p>The Portal will also give access to the Marketplace giving a single point of entry</p>	<p>If the portal is attached to a marketplace links should allow users to user the marketplace from the portal sign on</p>