London Borough of Bromley

Registration, Accreditation and Enrolment

Matrix SPS

S2 - SProc.Net – Education & Support Services – v2.3
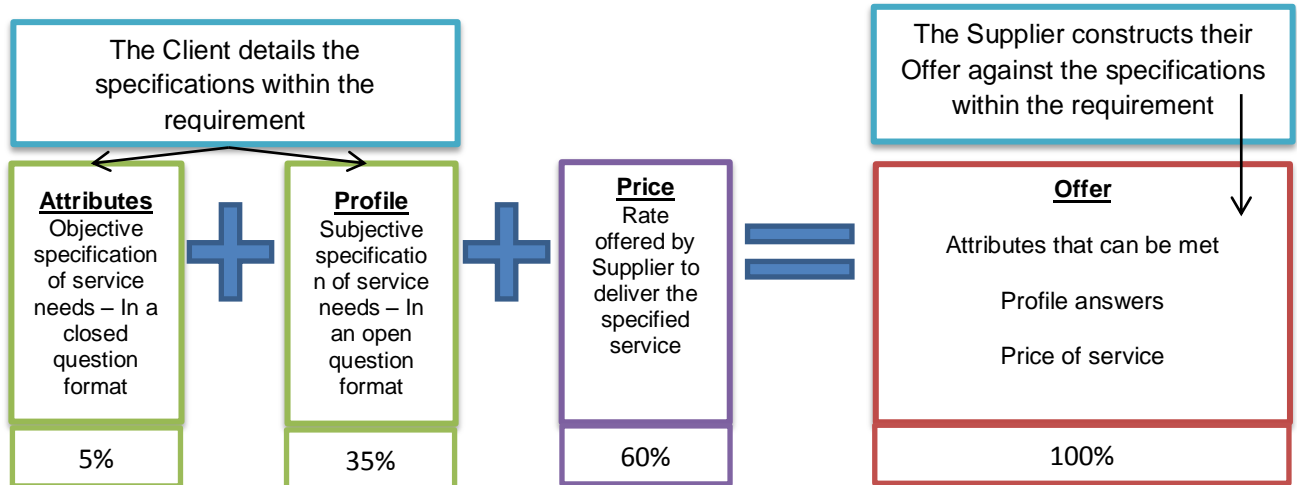
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Overview

The SProc.Net system is a sophisticated web based technology platform used by Clients and Suppliers to aid in the efficient and fair procurement of services through a 14-step process.

Requirements (Client service needs) and Offers (Supplier service bids) within the system are broken down into three separate metrics; Attributes, Profile and Price.

The Client details the specifications within the requirement			The Supplier constructs their Offer against the specifications within the requirement

Attributes Objective specification of service needs – In a closed question format	**Profile** Subjective specification of service needs – In an open question format	**Price** Rate offered by Supplier to deliver the specified service	**Offer** Attributes that can be met Profile answers Price of service
5%	35%	60%	100%

The Client inputs for what percentage these three metrics will account in the complete Offer score, which defines how the SProc.Net system will rank those Offers into a shortlist.

During the Requirement creation and distribution period a Client also sets out timescales that outline the subsequent periods where Offers can be reviewed and revised.

Requirement Client creation and distribution	→	**Open for Offers** Suppliers submit their offers	→	**Client Review** Client score shortlisted offers	→	**Bidding** Suppliers revise their offer's pricing to submit a best and final offer	→	**Client Decision** Client selects an offer & creates a Service Agreement	→	**Service Agreement** Service Agreement becomes active and delivery commences

Note:
- ➜ If the service start date is within 24 hours of Requirement distribution the above timescales will not apply. Supplier Offers will be evaluated when submitted and a Service Agreement (contract) created straightaway when a suitable Supplier is identified.
- ➜ Offers submitted are to deliver a service, not a specific person/worker.

Once all the review periods are complete the Client is presented with a final shortlist of Offers based on the Offer scores in relation to the three metrics (Attributes, Profile and Price).

They will then progress the top ranked Offer through to the Service Agreement (contract) step and this finalises the procurement process, after which the service delivery can commence.

This guide is a step-by-step walk through of how to:
- ➜ Complete the Registration process
- ➜ Add additional Supplier locations to your system
- ➜ Create additional users within the system
- ➜ Create an Accreditation
- ➜ Create an Enrolment

Glossary

Terminology	Description
New Supplier	A Supplier who has never used the SProc.Net system before
Supply Category	The Supply Category is the over-arching service sector. Type of service, e.g. Training Services, Care Services, Education and Support Services, etc.
Service Category	The Supply Category is broken down into smaller Service Categories. For example, 'Education and Support' is broken down into the Service Categories 'School Support Consultants' 'Supply Teachers for Behaviour Services', etc.
Service Template	Service title, outlining the type of service required
Registration	Process to gain access to SProc.Net – Username and password
Accreditation	An objective evaluation based on a set of defined criteria
Enrolment	A subjective evaluation based on a set of defined criteria
Draft	Saved workings but process incomplete
User	An employee who manages services procurement through SProc.Net
Administrator	A system user with the highest level of access

System Icons

	All fields displaying this icon MUST be completed to continue to the next stage in the process.
	The magnifying glass indicates the section needs to be populated by pre-set information, found by clicking this icon. A separate window will appear with a list of options / answers from which to choose.
	The right pointing arrow is the icon used to select a pre-populated answer or statement from the separate window that appears when you use the above function.
	Any information, statements or answers pre-populated or populated in error can be removed using this rubbish bin icon.
	The down pointing arrow will provide a dropdown selection of answers for the user to choose from when answering questions / statements.
	This upload icon will provide a separate window for users to search their computer documents and select which are required / asked for during this process.
	If you click on the question mark, a small window containing further information about what is required during a specific section will appear.

Registration

Note: You only need to complete Registration if you are a new Supplier to SProc.Net. If you supply another Client via the system, you need to start with Accreditation. See page 17.

1. Go to the SProc.Net website: www.SProc.net

2. The SProc.Net login page contains the links to register as a new Supplier:

Clicking here will direct you to the 'New Supplier Registration' form. This needs to be completed by every new Supplier. The Registration process will generate a username and password and allow a Supplier access to the SProc.Net system.
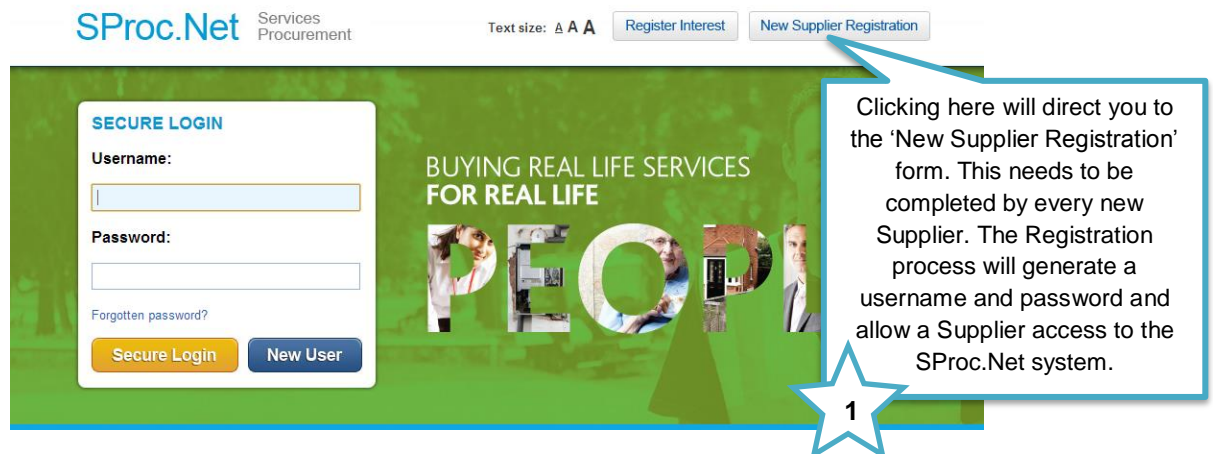
3. The registration form will ask for details about your company:

Enter all your details as asked. These details will create your new SProc.Net account.

4. Navigate through to the next page by clicking 'Next'

5. This page is about creating a user profile. This first user will, by default, become the Supplier Administrator for your SProc.Net system. They will have full access to tailor the system and can create further 'users' within the SProc.Net system at a later stage. This user can also create other administrators who will have full access (details on page 10):

6. Complete registration by clicking 'Finish'

7. Clicking 'Finish' will take you back to the SProc.Net login page and you will shortly receive an email containing a username and password:

These details will allow access to the SProc.Net system.
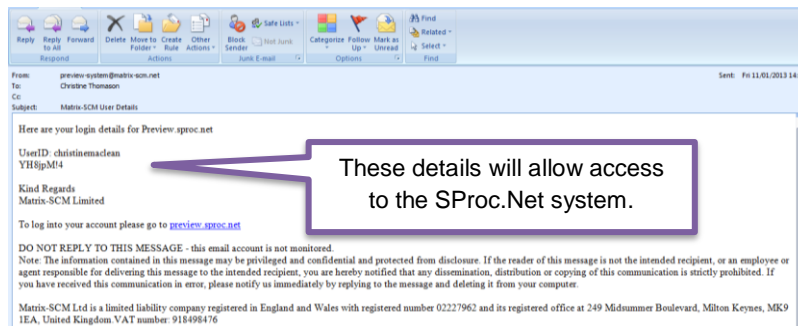
8. From the SProc.Net login page, login using the username and password provided. There will be an automatic prompt to change your password:

Change the password to something memorable.

9. Click 'Reset Password' and the system will navigate back to the SProc.Net login screen

10. Login using the given username and new password and click 'Secure Login'
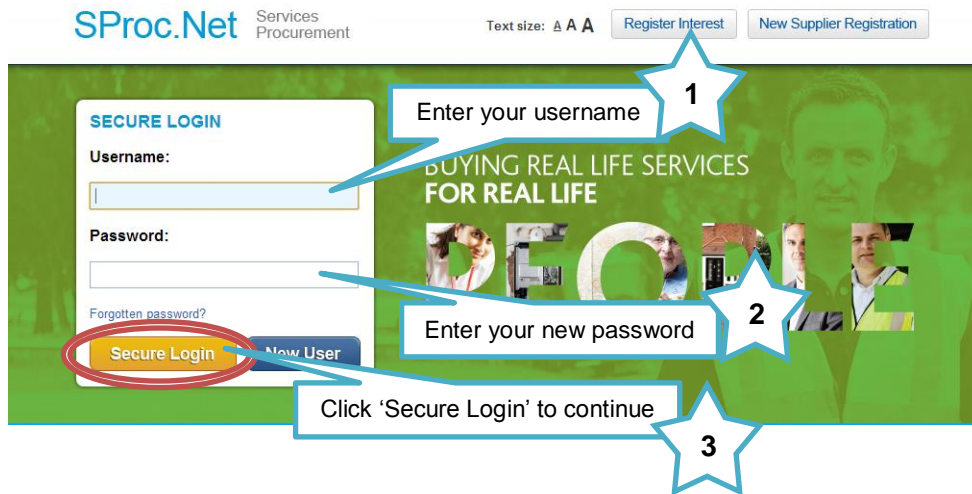
11. You will be directed to your 'My Company' homepage
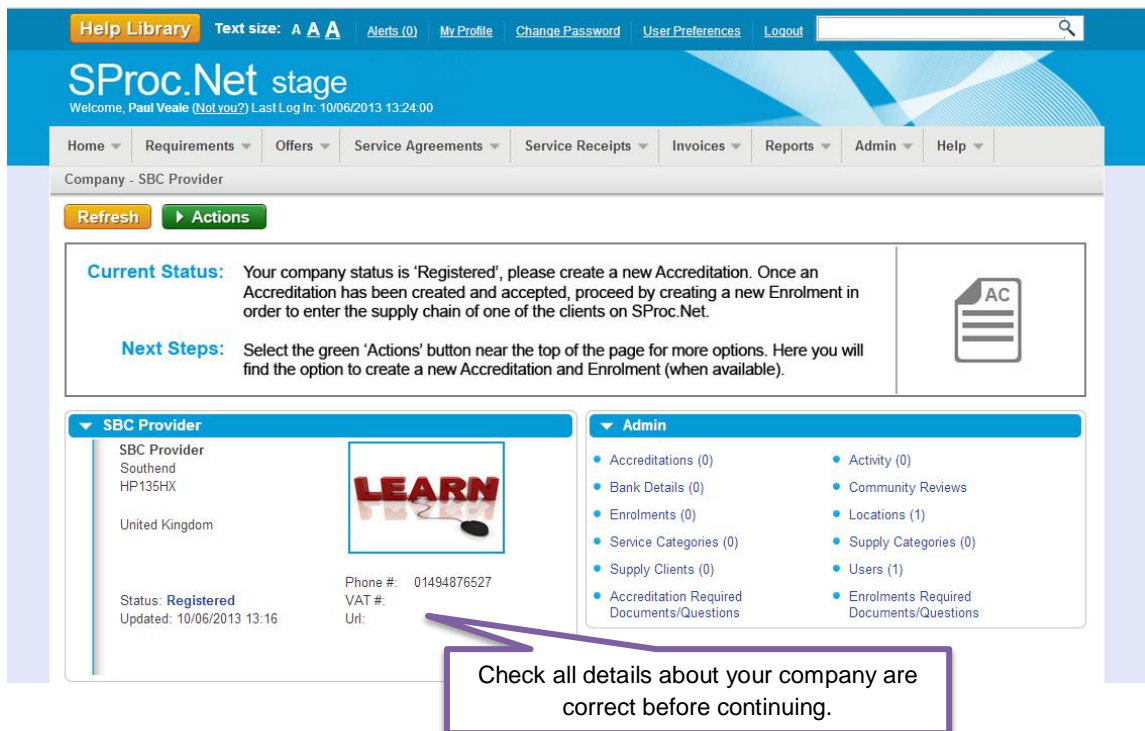
Adding Additional Locations

➔ Use this process to add further branches of your company to your SProc.Net system.

➔ Within SProc.Net you will need to separately Enrol each branch/location within your company.

➔ This process allows you to manage multiple locations via one SProc.Net account then permits you to specify branch specific criteria. For example, different branch/locations can supply different Service Categories into a Client.

1) Login to your SProc.Net system
2) From your homepage expand the 'Admin' tab on your toolbar:

1

Click 'Admin' and then 'My Company'.
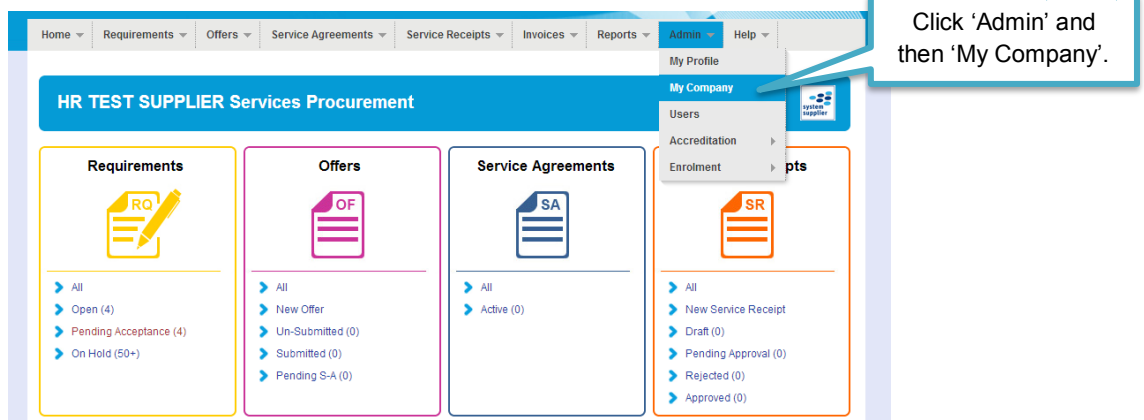
3) You will be directed to a page detailing all of your company information:
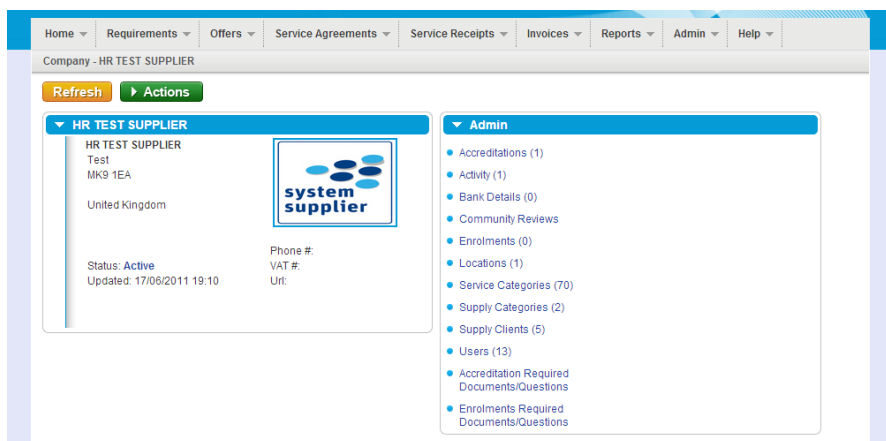
4) To add a location, select the 'Actions' icon:

2

Click the 'Actions' icon, then 'New Location'.
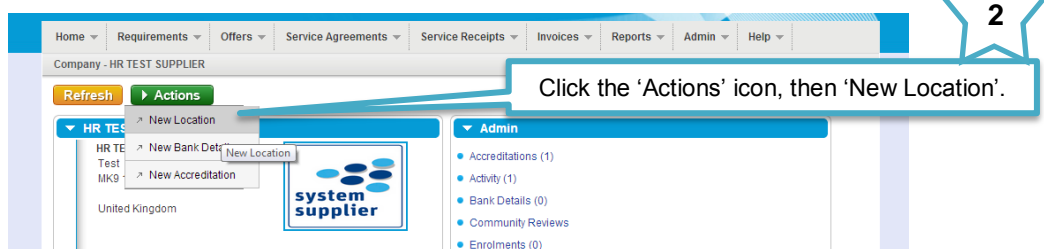
5) Input all of the information about your additional location:

Add all the new location details.

1

Click 'Next' to complete.

2

6) You will be returned to your company information page:

The new location will be listed under the 'Locations' icon.

Creating a New User

➔ Once you have set-up your SProc.Net account, you can create additional Users and/or Administrators who can access your system and complete steps within the process

User = Access to complete designated steps within the process

Administrator = As above, with authorisation to approve and edit user actions within the system

New User Request – Created by the new user

➔ Created by the user themselves then approved by the Administrator, or
➔ Created by you as the Administrator (see next section)

Created by the user:

1. Select 'New User' from the login page:

Click into the 'New User' icon to start the process.

1
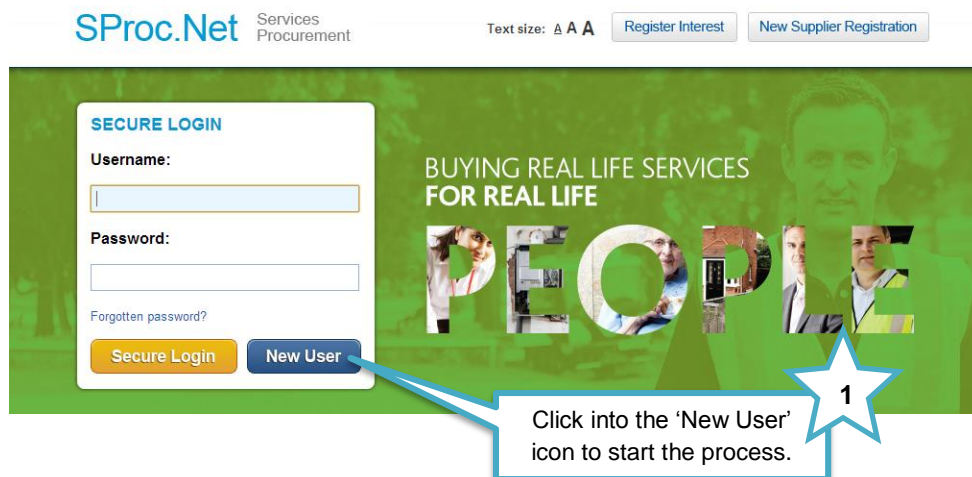
2. This will direct you to the 'New User' details page:

New User Registration - New User Details

To register as a new user please insert as...

- If you are an existing user and want t...
- It is mandatory to fill in the fields with...

① Business Det...
Please select either C... ...upplier dependant on the company you work f...
select the company...

User Role: * `Supplier ▾`

Use the ▾ icon to select a role from the drop-down list. **1**

Company: * `HR TEST SUPPLIER`

Clicking the ➡ icon will populate the window behind. **3**

Use the 🔍 icon to select a company from the list window. **2**

Input all the user details. **4**

② About You
Please provide a your personal details below.

First Name: *
Last Name: *
Email Address: *
Phone #:
Location: *

(Find Company - Google Chrome window)
SProc.Net - Find Company - Google Chrome
...w.sproc.net/Find.aspx?act=find&req=find&map=users&fld=
...any Name:
Sort by: ☐ Descending
`Find` `Cancel` ℹ companies [1 - 10 of 2,410]

Company Name▲	City:
.Maze 8	Mirfield
1 Four 1 Recruitment Limited	Crawley
1st...l Healthcare	Heckmondv
1st Choice Re...	
1st Class-Recruitment Co...	
1st for Staff Ltd	
1ST HAND CARE LTD	

⬅ Prev | Next ➡

③ Additional Information
Please provide any additional information that will assist your company's system administrators in approving your new user registration.

Additional Information:
`Test information`

Input further information for the approver to review. **5**

Click 'Register' to complete. **6**

`Cancel` `Register`

3. Once this form has been completed by you, your Administrator(s) will receive an email notification informing them that there is a New User request on the system

Approving a New User

1. Administrator: Login to your account and from the homepage expand the 'Admin' tab on your toolbar:

Click 'Admin' and then 'Users'.

1
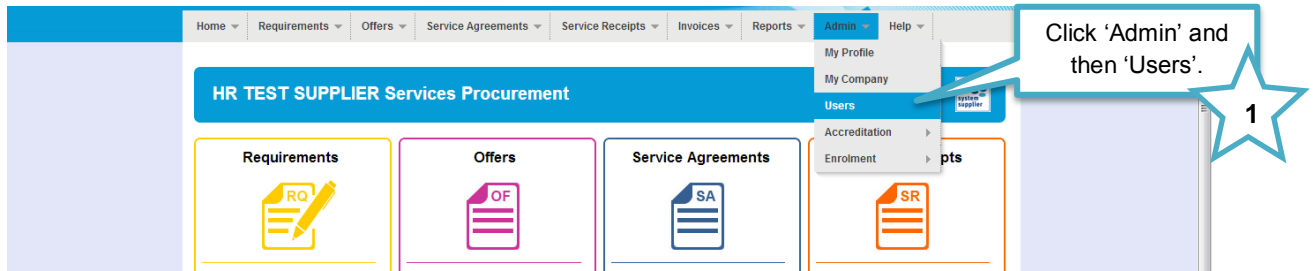
2. This will take you to a list view of all your users:

Clicking the ➡ icon will take you to that user's information page.

2
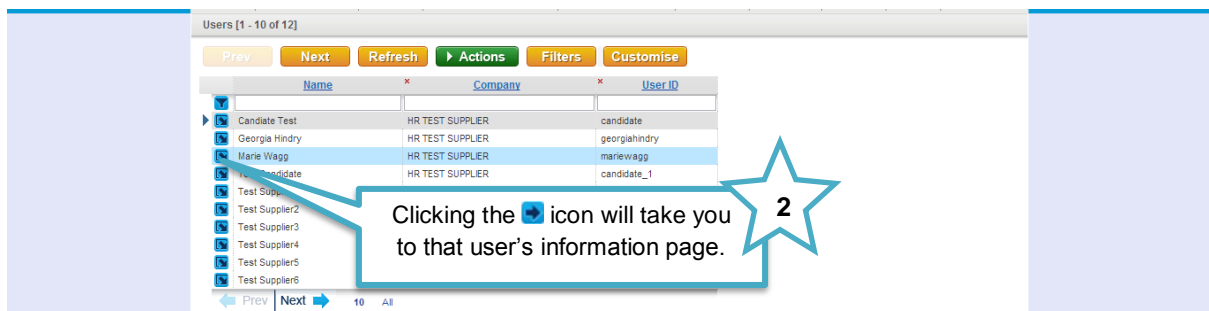
3. Click into the new user to view their details:

Click the user's name link.

3
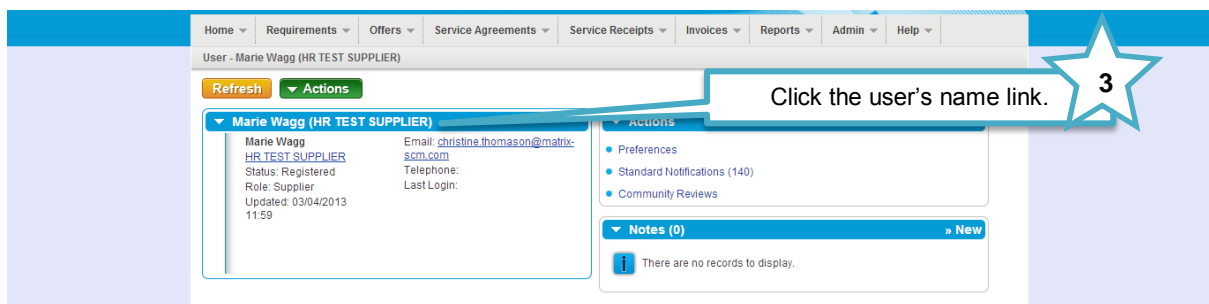
4. Review their details and select their account settings:

Role Name	Access	Example
Supplier Administrators	Access to view & approve all process steps	Supply Branch manager
Supplier Executives	Access to view & approve all process steps within a defined service area	Head of Service with supply branch
Supplier Finance	Access to view Supplier bills and invoices	Finance Manager
Supplier Managers	Access to use all system steps	Supplier employee
Supplier Users	Access to use authorised system steps	Supplier employee

5.   Once complete you will need to approve the user:

Click 'Actions' and then 'Approve/Reject'

1

6.   Accept or decline the new user application:

Select your decision and detail any comments about this user.

2

Click 'Save' to complete.

3
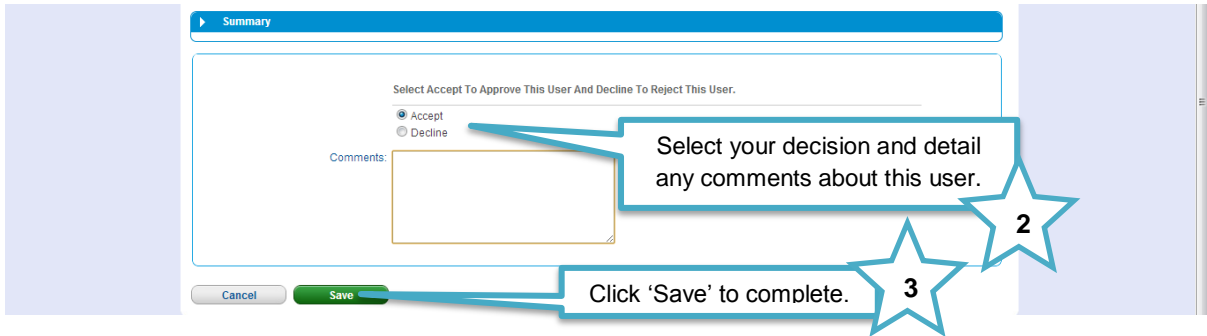
7.   If approved, this process will trigger an email to this new user informing them of their new username and password:

Here are your login details for Preview.sproc.net

UserID: mariewagg
Xg7nQ@bH

Kind Regards
Matrix-SCM Limited

To log into your account please go to preview.sproc.net

DO NOT REPLY TO THIS MESSAGE - this email account is not monitored.
Note: The information contained in this message may be privileged and confidential and protected from disclosure. If the reader of this message is not the intended recipient, or an employee or agent responsible for delivering this message to the intended recipient, you are hereby notified that any dissemination, distribution or copying of this communication is strictly prohibited. If you have received this communication in error, please notify us immediately by replying to the message and deleting it from your computer.

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New User Creation – By system administrator

Alternatively you as the Administrator can create and add new users to your system:

1) Login to your SProc.Net system
2) From your homepage expand the 'Admin' tab on your toolbar

Click 'Admin' and then 'My Company'.

1
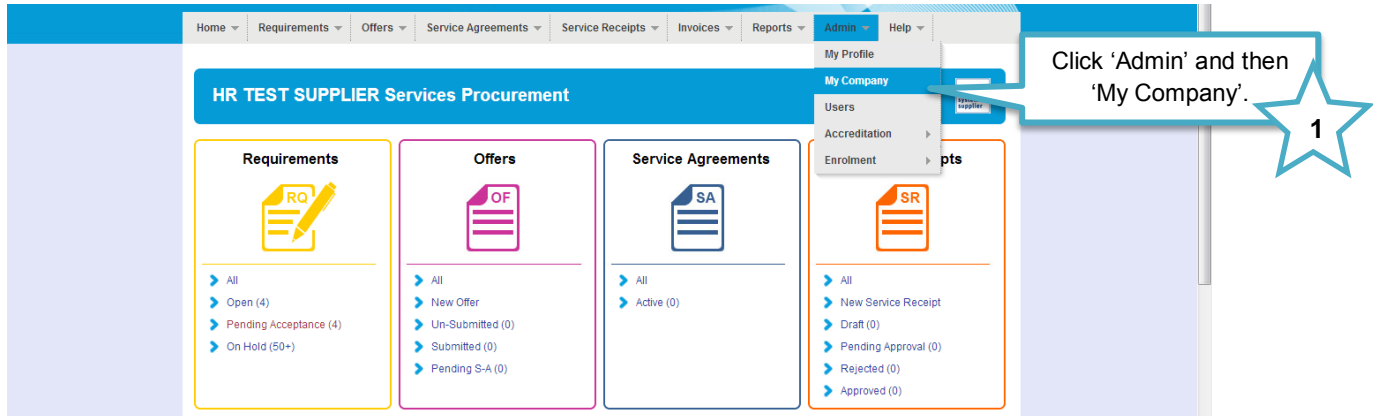
3) Select the 'Users' link under the Admin section of this page

Click the 'Users' link.

2

4) Select the 'New' icon

Clicking the 'New' icon will take you to the new user page.

3
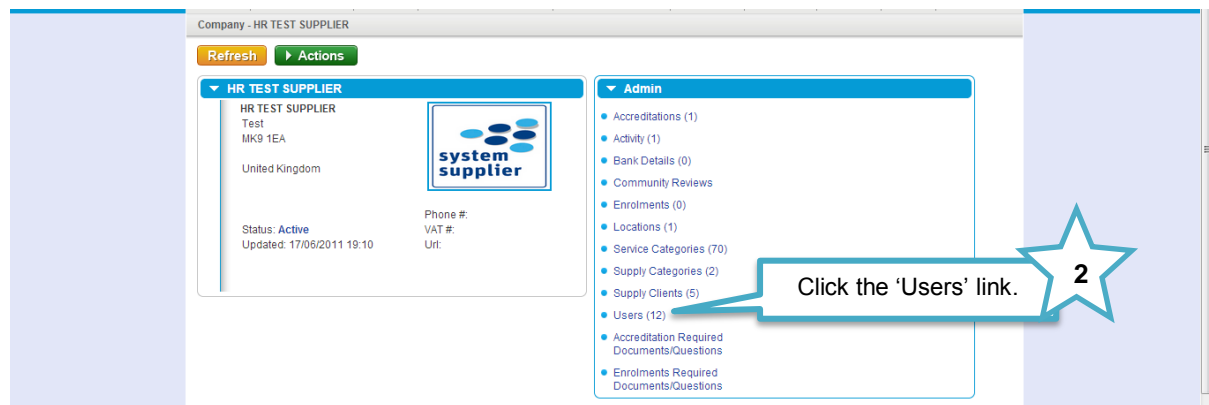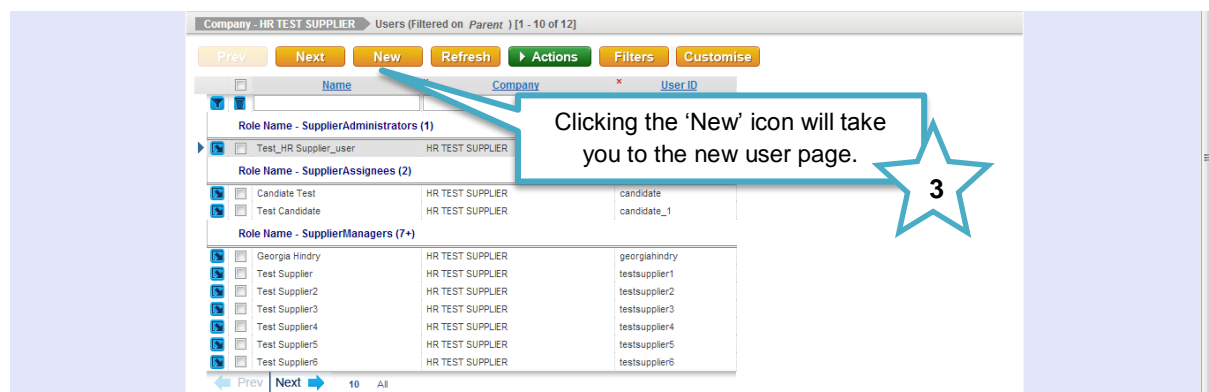
5) Complete the User's details and role:

1 Input the user's details.

2 Use the 🔍 icon to select a user location from the list window.

3 Use the ▾ icon to select the user's access level.

4 Click 'Save' to complete.

See table above for User Role explanations

6) This process will trigger an email to this new user informing them of their new username and password:

Here are your login details for Preview.sproc.net

UserID: mariewagg
Xg7nQ@bH

Kind Regards
Matrix-SCM Limited

To log into your account please go to preview.sproc.net

DO NOT REPLY TO THIS MESSAGE - this email account is not monitored.
Note: The information contained in this message may be privileged and confidential and protected from disclosure. If the reader of this message is not the intended recipient, or an employee or agent responsible for delivering this message to the intended recipient, you are hereby notified that any dissemination, distribution or copying of this communication is strictly prohibited. If you have received this communication in error, please notify us immediately by replying to the message and deleting it from your computer.

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Accreditation and Enrolment

All Suppliers need to go through Accreditation and Enrolment before they can supply any Client using SProc.Net. This involves submission of details and questions being answered that are set by the Client as a standards threshold / minimum criteria. Suppliers Accredit at a parent company level, and Enrol at a location level.

1. Start this process from your homepage, hover over the 'Admin' icon on the grey toolbar, highlighting 'Accreditation' and clicking 'New':
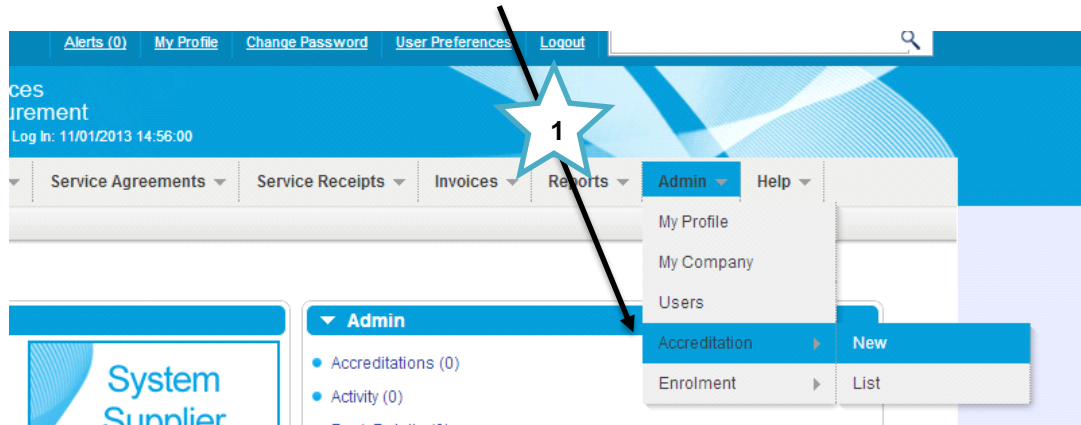
2. Populate the required fields:
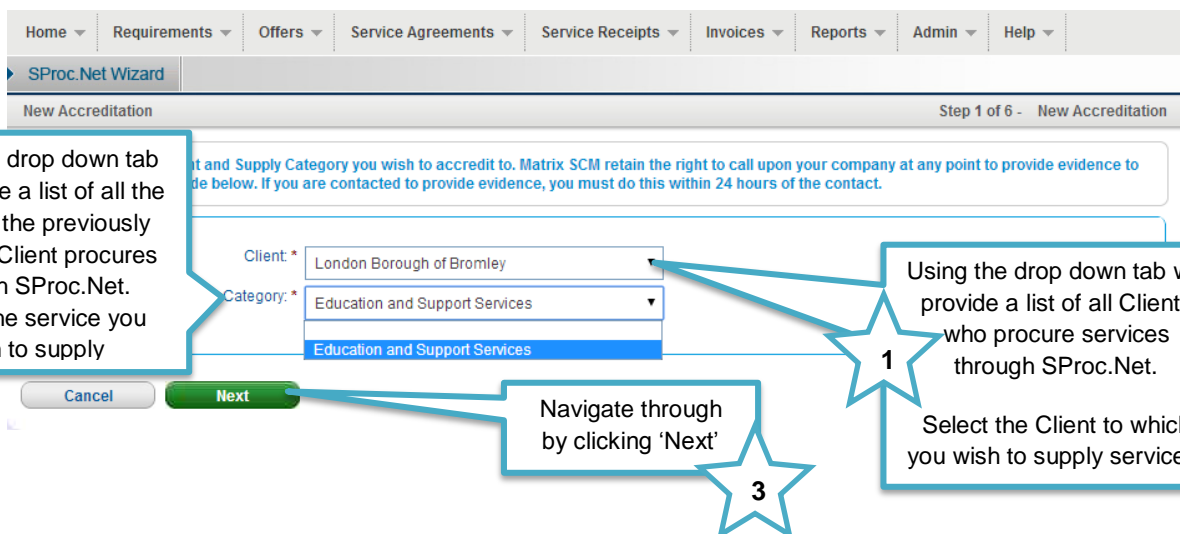
Notes:

Supply Category = Service Area – For example, Care Home Services, SEND Services, Transport Services, etc.

➔ Within SProc.Net Accreditation and Enrolment is individual to each Client's Supply Category, so you can supply services to more than one Client, or more than one service to the same Client, but you must go through the Accreditation and Enrolment process for each Client/Category separately.

3. The next page will require you to answer a selection of Yes/No questions, sign and upload a Matrix self-billing agreement and other documents:

Accreditation - Additional Information

▶ **Accreditation**

▼ **Questions**

The following questions must be answered accurately before this Accreditation can be submitted

Question Type	Question Text	
Insurances	Are you self-employed/a consultant, or do you have Employer's Liability Insurance cover for £5 million, you willing to put this in place if awarded a Service Agreement? If you have this insurance, please upl	
Insurances	Do you have Public Liability Insurance cover for £10 million, or are you willing to put this in place if awarded a Service Agreement? If you have this insurance, please upload your Certificate of Insurance below.	
Insurances	Do you have Professional Indemnity Insurance cover for £1 million, or are you willing to put this in place if awarded a Service Agreement? If you have this insurance, please upload your Certificate of Insurance below.	▼
Safeguarding	Are you self-employed/a consultant, or do you run, or are you willing to run DBS checks on all your workers, including employees, volunteers and sub-contractors who may, in the course of their duties, come in to	▼
Referees/References	Please confirm you will provide references on request.	▼

Use the drop down tab to select Yes/No.

The Accreditation application will not be submitted to a Client if any of these answers are incorrect.

1

▼ **Downloadable Templates**

The following documents will need to be downloaded, completed in full, signed and uploaded below before this Accreditation can be submitted

Document Type	Template File Name
Self Bill Agreement	London Borough Of Bromley - Education and Support Services - Self-Billing Agreement - 2014-01-20.doc
...ature Document	London Borough Of Bromley - Education and Support Services - Signature D....doc

Using the upload icon, Suppliers are required to upload documentation.

The success of the Accreditation application will depend on the documents uploaded and their contents.

2

Documents

vant documents will need to be uploaded for each of the document types before the Accreditation can be submitted.

cuments can be pulled through automatically from previous uploads to the sys

greem...

Supplier Agreement

Using the calendar icons, add the document's issue and expiry dates. Type in the issue number

3

Cancel   Save

Click 'Save' to continue   **4**

Please note, as a security feature this page will 'time out' if the 'Save' button is not clicked within 30 minutes and you risk losing your work.

4. Confirm you have read and understood all terms and conditions

▼ Accreditation

Accreditation #:   AC9066
Status: Draft
Client Name: London Borough of
Category: Services
Supplier Name: Support Supplier 3

Matrix SCM retain the right to call upon your company at any point to provide evidence to the answers you provide below. If you are contacted to provide evidence, you must do this within 24 hours of the contact.

By Clicking submit you are agreeing to the Matrix-SCM terms and conditions of Accreditation.

1 Click a tick into the box

I Agree That I Am Certified To Accept Responsibility For Submitting This Documentation On Behalf Of My Company

Cancel   Submit   **Click 'Submit' to continue 2**

5. Select the branch/location you wish to Accredit/Enrol to Bromley Council; each branch/location will need to go through this process individually

Supplier Location: *

Use the 🔍 icon to bring up the list of locations and select the correct location using the 🔗 icon.   **1**

Cancel   Next

Click 'Next' to continue 3

Company:
Location:
Sort by: ▼ □ Descending Clear Search

Find   Cancel   ⓘ Locations [1 - 1 of 1]

Comp...	Location	Address Line 1	City
TaxiDemo	TaxiDemo	100 Test Street	Milton Keynes

← Prev | Next →   **2**

Guidance on adding additional locations to your SProc.Net system is available on page 8

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6. Answer all question (yes/no and free-text) and upload against all required fields

Please note, as a security feature this page will 'time out' if the 'Finish' button is not clicked within 30 minutes and you risk losing your work. See page 22

1 Use the drop down tab to select Yes/No to answer the Enrolment questions asked.

2 Answer the free-text Enrolment questions

3 Using the upload icon, Suppliers are required to upload the requested documentation.

The success of the Enrolment will depend on the documents uploaded and their contents.

"Optional Documents" are non-mandatory within an Enrolment submission but will be requested for review depending on the answers given to the Enrolment questions above. For example: "11. If you answered No to question 10, please confirm you will provide a copy of your organisation's Health & Safety policy or details of the measures your organisation takes in order to adhere to health and safety at work practices and legislation; and upload this in the space provided."

4 Using the calendar icons, add the document's issue and expiry dates. Type in the issue number

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Enrolment continued:

➔ As a Supplier you must select which Service Categories you can supply.
➔ At Enrolment you will stipulate which categories of services you can supply into Bromley Council; subsequently you will only be able to make Offers against Requirements relevant to these selections.

Click 'Find more items' icon to bring up a list of Bromley's Service Categories **1**

Click ticks into all relevant categories and then click 'Done' to complete. **2**

Click 'Finish' to continue **3**

7. To complete

To complete your Enrolment please click the Submit button below

Click 'Submit' **1**

Saving an Enrolment to Draft

Please note, as a security feature the Enrolment page will 'time out' if the 'Finish' button is not clicked within 30 minutes and you risk losing your work.

To save information and leave the creation wizard without submitting the Enrolment you will need to save the item into 'Draft'.

1. On the data entry page you will need to answer all yes/no questions, upload the mandatory documents, select your service categories and enter a character into each free-text box:

> All fields **MUST** have information in them to save the item to 'Draft'. The answers/text can be edited before submission.
>
> **1**

2. At the bottom of the screen click 'Finish'
3. On the subsequent screen click 'Cancel'

> Click 'Cancel' to save to 'Draft'
>
> **2**

> If you click 'Submit' the Enrolment will be submitted for approval

4. Clicking 'Cancel' will take you to the Enrolment summary page and this item will be saved under the 'Draft' status.

> Use the unique identification number of the item in the search field to find the item within your system

> Item in 'Draft'

> Take note of the Enrolment identification number to locate the item when re-entering the system.

5. From the Enrolment summary page, to edit the information click into the 'Actions' icon
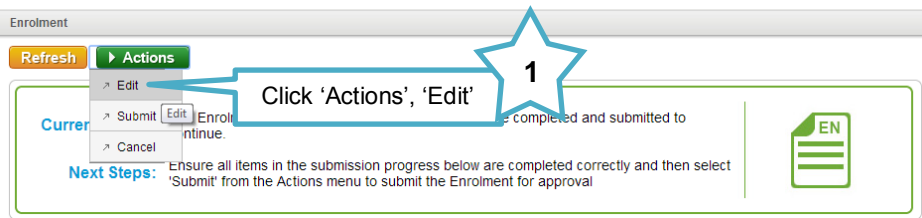
6. Edit the information as needed, replacing any draft text/characters previously used to save
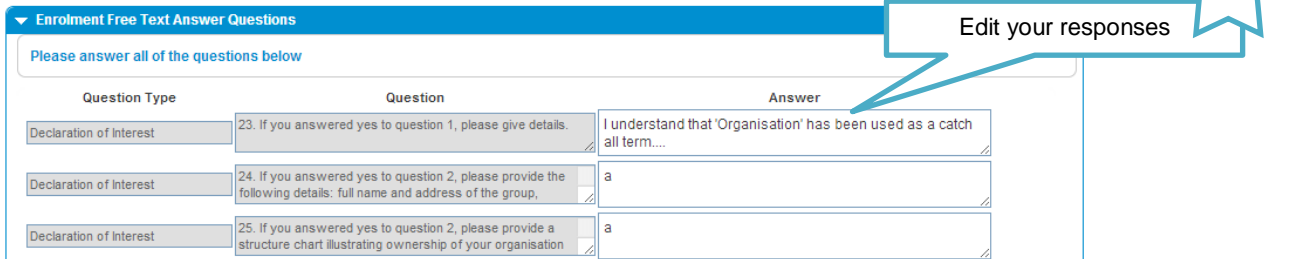
7. This process can be repeated as many times as needed, clicking **Finish** frequently to save your current workings.

8. When complete use the 'Actions' icon to 'Submit'
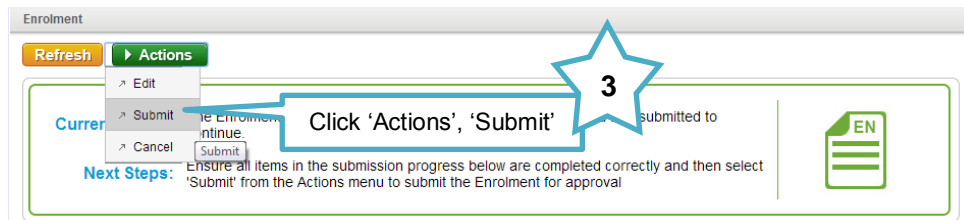
9. Click 'Submit' to complete
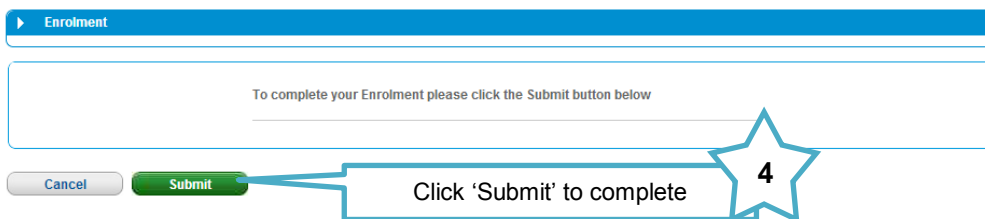
10. The status of the Enrolment will show as submitted
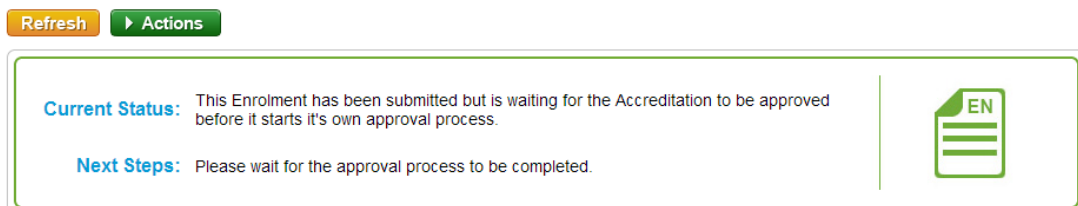
Alternatively, you can answer the questions outside of the system and copy and paste them into the answer fields.

Summary Pages

➔ These pages contain all the submission details of your Accreditation and Enrolment

Enrolment Summary:

Accreditation Summary:

Email notifications

1. You will receive an email to inform you if your Accreditation/Enrolment application has been successful or not.
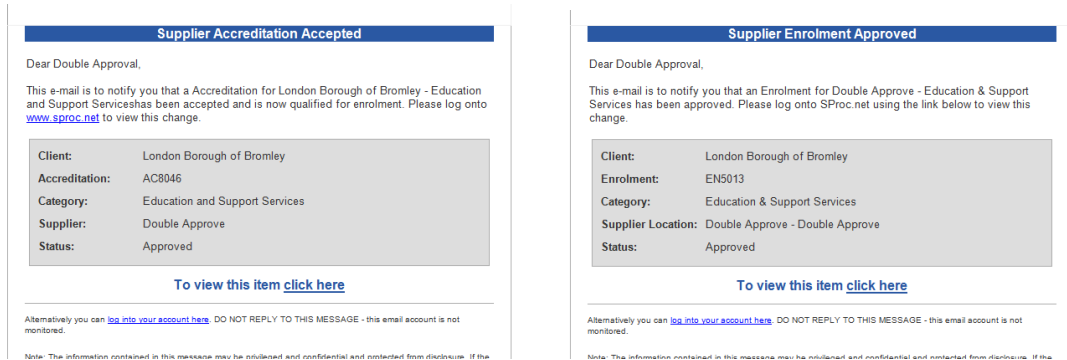
2. You will see all the details of your Accreditation/Enrolment when you login to SProc.Net:
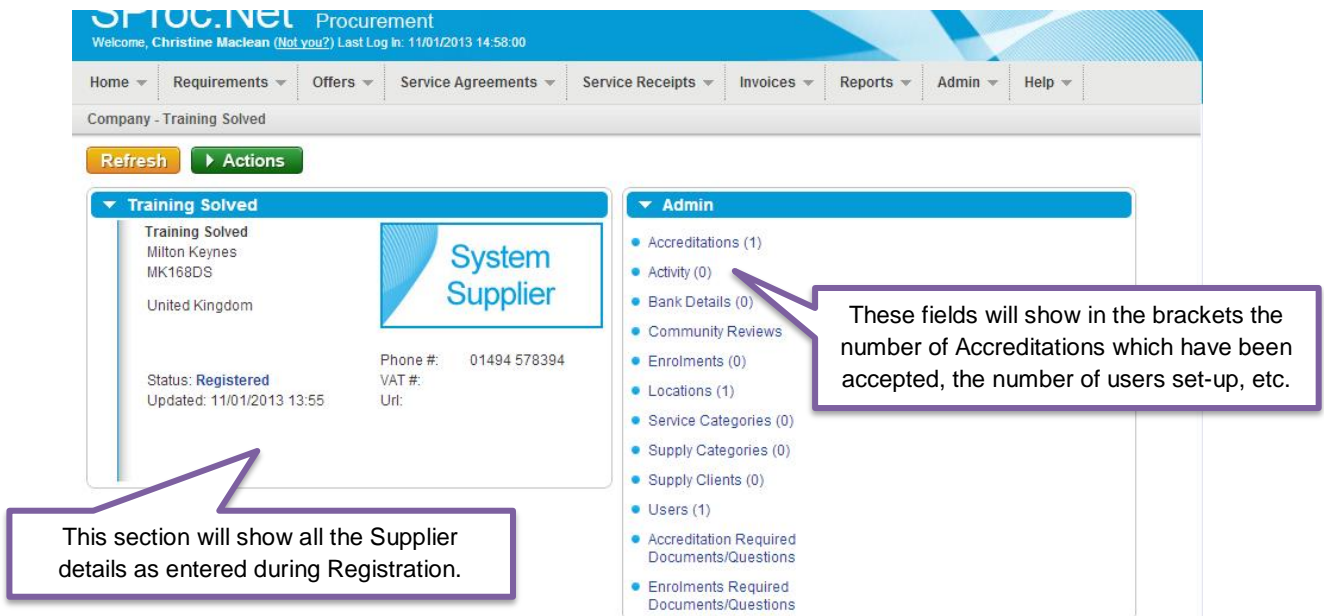
Resubmitting a Declined Accreditation

1. If your Accreditation is declined, from your homepage:

Click 'Admin', 'Accreditations' and 'List'.

1
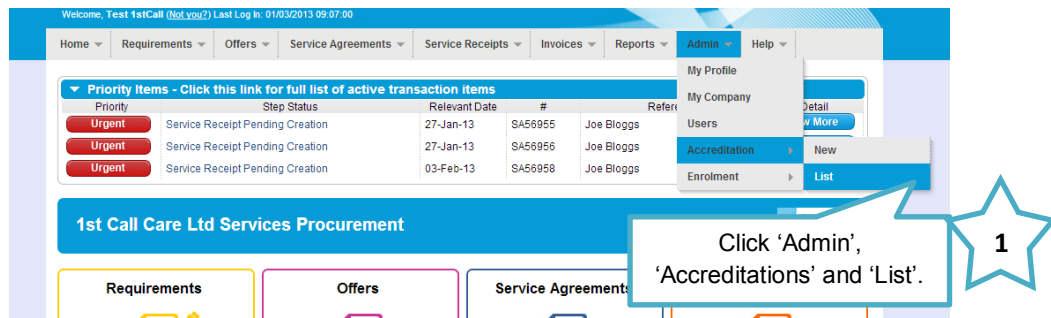
2. This will show you a list view of all of your Accreditations:

Use the 🖼 icon to select the Accreditation you wish to review.

2
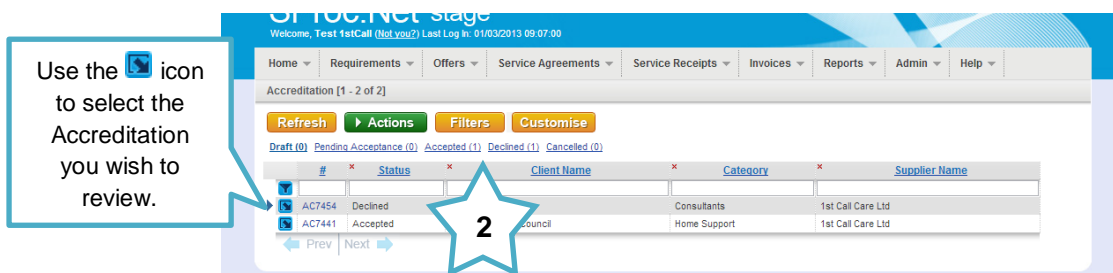
3. This will show you the accreditation summary page:

Click the **Printable Detail** icon and a separate window will load.

3
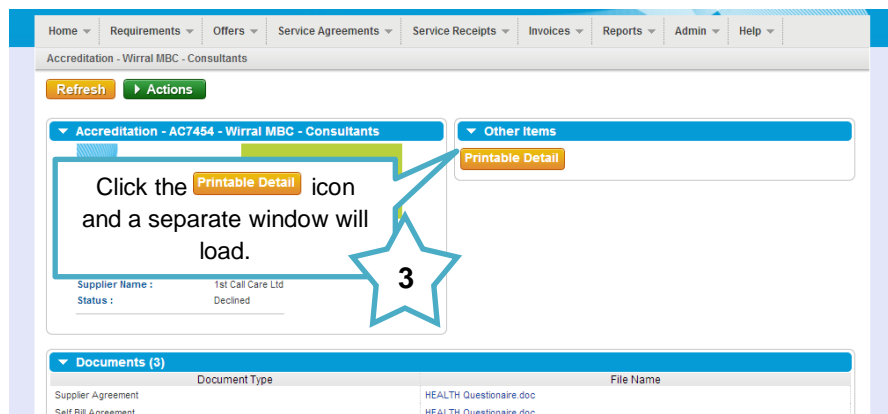
4. This document will show you all the accreditation information and the reason it was declined:

Review the details of why the Accreditation was declined.

Once reviewed and any required amendments or updates are made, you can resubmit your Accreditation

5. From the Accreditation summary page:

1

To update the Accreditation information click 'Actions' and 'Re-upload Doc & Re-submit'

6. Update the required information

Review feedback from Matrix SPS

1 Using the upload icon, upload the revised documentation.

2 Click 'Submit' to continue

7. Confirm you agree to the terms and conditions

1 Click a tick into the box

2 Click 'Submit' to continue

8. The Accreditation submission will have updated to show it has been re-submitted to Matrix SPS for review

Accreditation status updated

Current Status: This Accreditation is pending Matrix review.

Next Steps: Create a new Enrolment from the actions menu while waiting for Matrix to review this Accreditation. You will receive email updated when this happens

Resubmitting a Declined Enrolment

1. If your Enrolment is declined, from your homepage:

Click 'Admin', 'Enrolment' and 'All'.

1
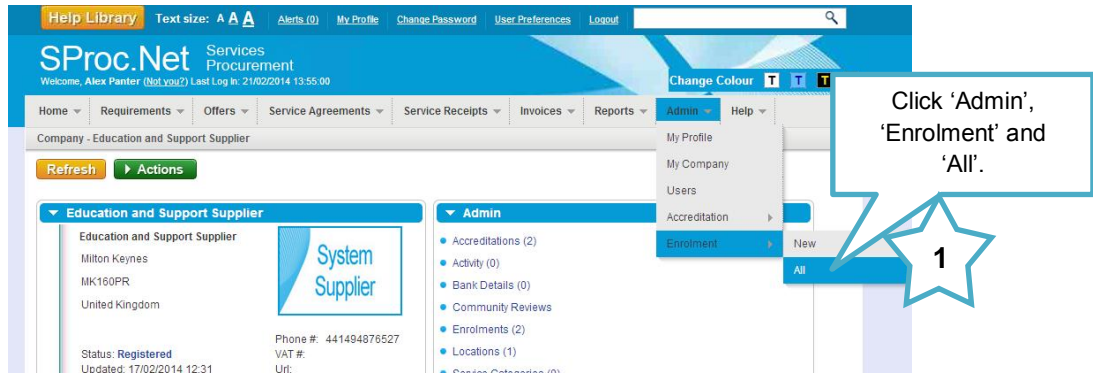
2. This will show you a list view of all of your Enrolments:

Use the [icon] icon to select the Enrolment you wish to review.

1
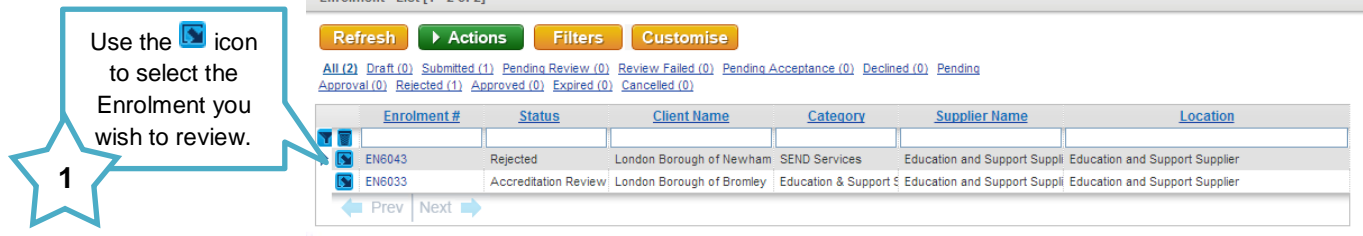
3. This will show you the Enrolment summary page:

Click the **Printable Detail** icon and a separate window will load.

1
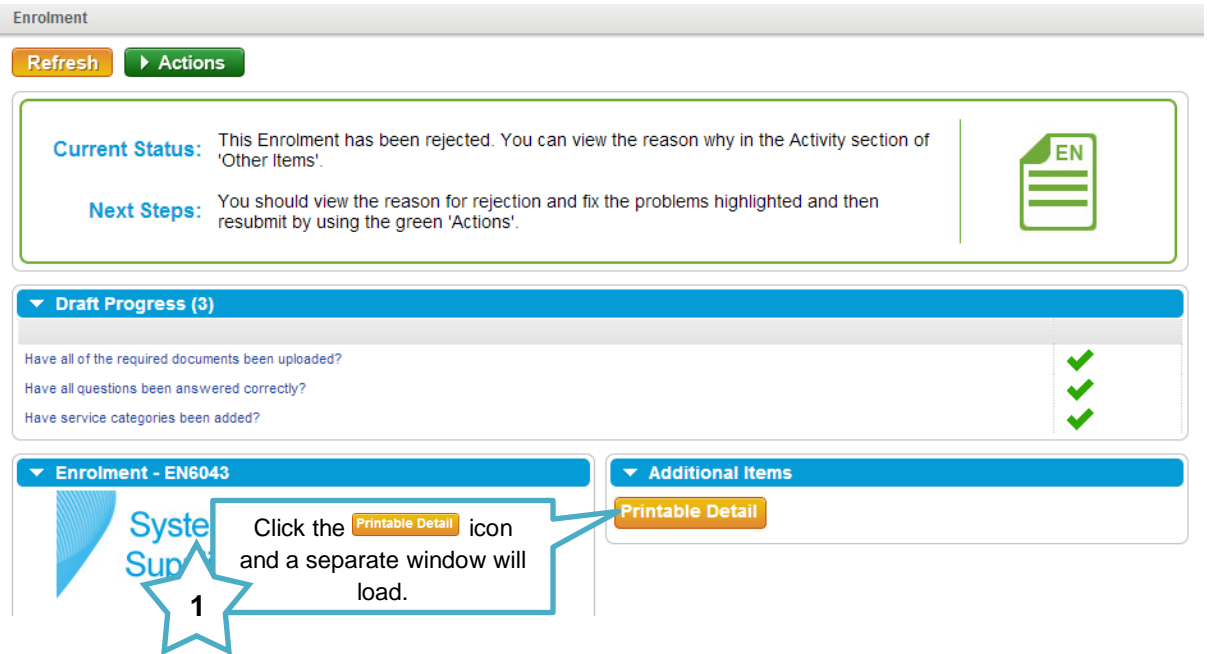
4. This document will show you all the Enrolment information and the reason it was declined:

At the bottom of the report there will be an Activity field, this will contain the rejection comments as detailed by the Client:

Review the details of why the Enrolment was declined.

Once reviewed and any required amendments or updates are made, you can resubmit your Enrolment.

5. From the Enrolment summary page:

To edit the Enrolment information click 'Actions' 'Edit'.

1

Update the required information:

6. Click 'Finish' to save your update, you will be returned to the Enrolment summary page and the item information will have updated
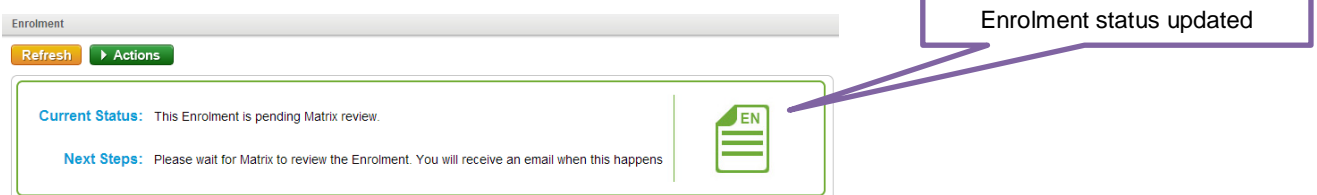7. To submit

Click 'Actions', 'Submit' to continue

1
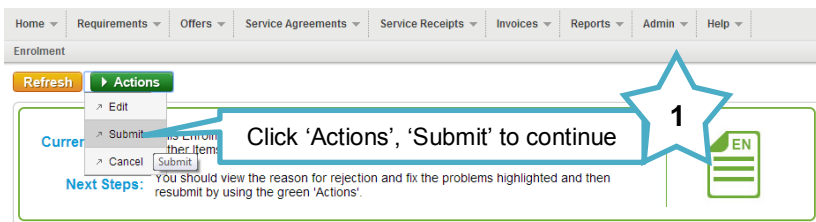
8. Click 'Submit' to complete

Click 'Submit' to complete

2

9. The Enrolment submission will have updated to show it has been re-submitted to Matrix SPS for review


Enrolment status updated

Need More Support?

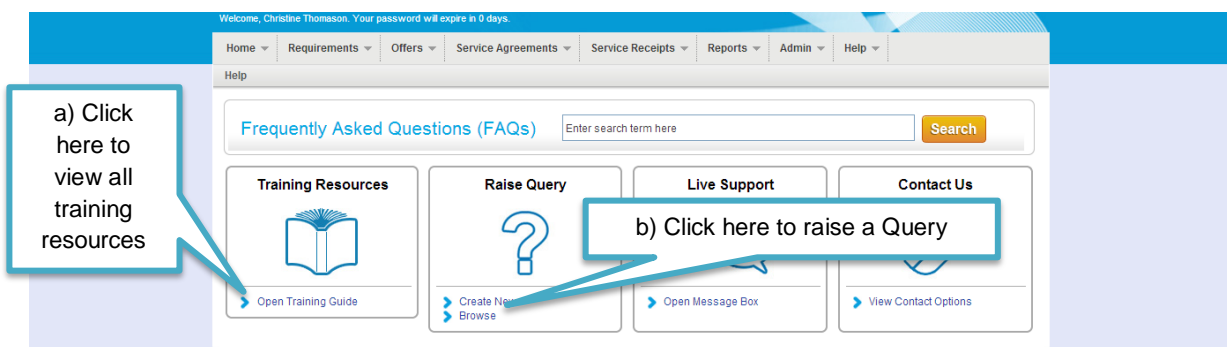The contact details for your SProc.Net system support are below:

Supplier Phone Number: 0871 474 0332

If you need more support regarding anything detailed in this guide, please use the help functions available within your SProc.Net account:
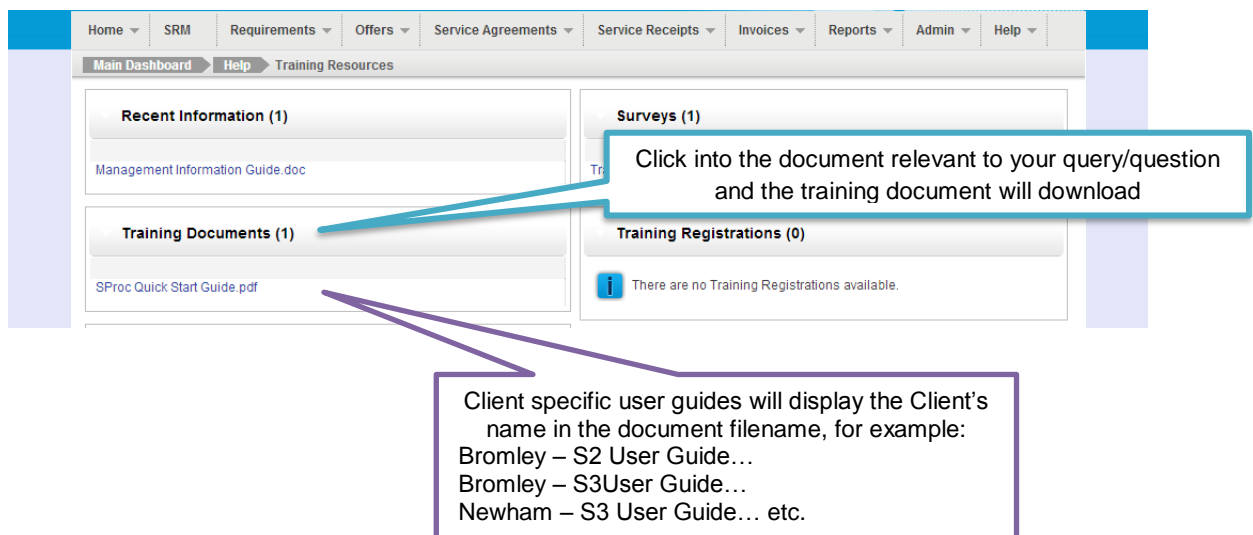
Click into the 'Help Library' icon on your homepage

| Help Library | Alerts (0) | My Profile | Change Password | User Preferences | Logout |
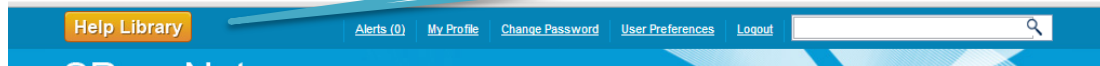
You will be taken to our Help Library where you have a number of different ways of finding the answer to any questions you may have:

Welcome, Christine Thomason. Your password will expire in 0 days.

Home | Requirements | Offers | Service Agreements | Service Receipts | Reports | Admin | Help

Help

a) Click here to view all training resources

Frequently Asked Questions (FAQs) — Enter search term here — Search

| Training Resources | Raise Query | Live Support | Contact Us |

b) Click here to raise a Query

> Open Training Guide
> Create New Browse
> Open Message Box
> View Contact Options

a) Training Guides / Documents / Videos are available for you to view and use as support:

Home | SRM | Requirements | Offers | Service Agreements | Service Receipts | Invoices | Reports | Admin | Help

Main Dashboard > Help > Training Resources

| Recent Information (1) | Surveys (1) |
| Management Information Guide.doc | |

Click into the document relevant to your query/question and the training document will download

| Training Documents (1) | Training Registrations (0) |
| SProc Quick Start Guide.pdf | There are no Training Registrations available. |

Client specific user guides will display the Client's name in the document filename, for example:
Bromley – S2 User Guide…
Bromley – S3User Guide…
Newham – S3 User Guide… etc.

b) Queries can be raised to the Matrix SPS Account Management team:

Basic Details

BCC:	Birmingham City Council
Type: *	
Reason: *	
Reason Sub Type:	(Specify a more specific reason for your query *optional*)
Subject: *	(A brief description of your query)
Description: *	

Input all the details of your query/question as instructed

Additional Information

Query File:	(Attach a screenshot ... up your query)
Contact Phone:	

Upload any files relevant to your question using the 📄 icon

Cancel   Save

Click 'Save' to send

➔ A member of the Matrix SPS Account Management team will be assigned your Query and they will respond to you with an answer.
➔ Each individual Query has its own unique reference number which will detail the question and the response.
➔ You can look through all the Queries you have raised and any that have been raised by members of your team (details of who is in your SProc.Net team can be found in your profile in the 'My Team' section) by clicking into the 'Browse' link under the Queries section of the Help Library.

All Queries that have been raised by you or your team

All these support options are also displayed on your SProc.Net homepage with your helpline phone number:

Requirements
- All
- New Requirement
- Draft (44)
- Pending Distribution (0)
- Open (50+)
- On Hold (50+)

Offers
- All
- Submitted (15)
- Under Consideration (50+)
- Pending S-A (38)

Service Agreements
- All
- Pending Approval (1)
- Pending Acceptance (6)
- Active (37)

Service Receipts
- All
- Pending Approval (14)
- Rejected (0)
- Approved (4)

Admin
- My Profile
- Accreditations
- Enrolments
- Users

Help Dashboard
- What's New?
- Options

Raise Query
- Create New
- Browse

Operations Centre

Email Us
- Click here

matrix scm