

adam

London Borough of Lewisham

Passenger Transport Services

Accreditation & Enrolment User Guide

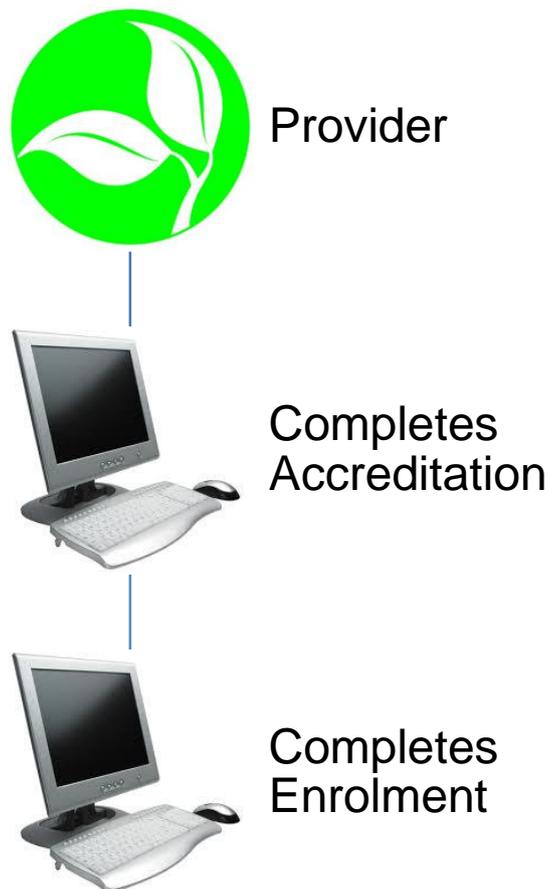
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Overview

The SProc.Net system is a sophisticated web-based technology platform used by clients and providers to aid in the efficient and fair procurement of services.

Providers wishing to supply services using SProc.Net must complete an Accreditation and Enrolment process into their desired client-supply-category. For example, the client would be 'London Borough of Lewisham' with the supply category, 'Passenger Transport Services'.



Once completed and approved by Lewisham Council, a provider will be added to the specified supply base. Going forward, the provider will receive notifications of service Requirements distributed by the council and they will have to opportunity to submit Offers.

This guide is a step-by-step walk through of how to:

- ➔ Complete the Registration process
- ➔ Create additional users within the system
- ➔ Create an Accreditation
- ➔ Create an Enrolment

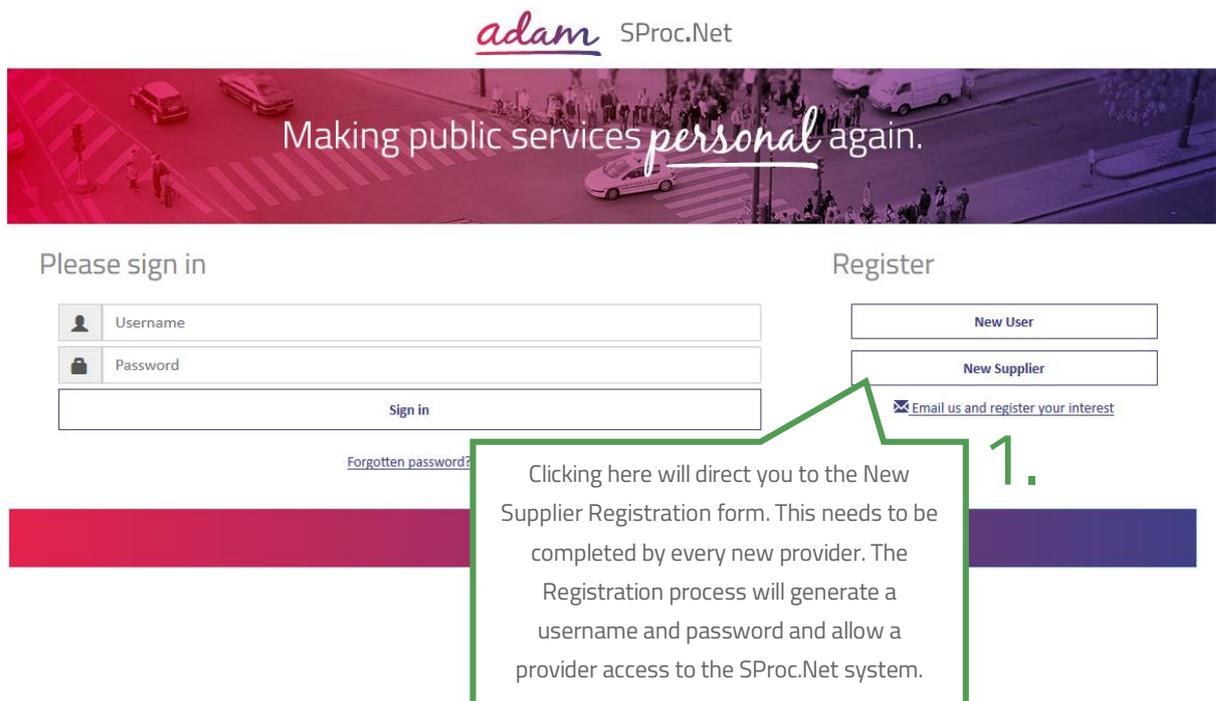
Glossary

New Supplier	A provider who has never used the SProc.Net system before
Supply Category	This is the over-arching service sector/type of service, e.g. 'Passenger Transport Services'
Service Category	The Supply Category is broken down into smaller Service Categories. E.g. 'Passenger Transport Services' can be broken down into 'Children Services' & 'Community Services'.
Service Template	Further category breakdown in to the specific service required for an individual
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

Registration

You only need to complete the Registration process if you are a new provider on SProc.Net. If you supply to another client via the system, you need to start with the Accreditation (see page 9).

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':



The screenshot shows the SProc.Net website header with the logo and tagline "Making public services *personal* again." Below the header, there are two main sections: "Please sign in" and "Register".

Please sign in

- Username input field
- Password input field
- Sign in button
- [Forgotten password?](#) link

Register

- [New User](#) button
- [New Supplier](#) button
- [Email us and register your interest](#) checkbox

A green callout box with a pointer to the "New Supplier" button contains the following text:

1. Clicking here will direct you to the New Supplier Registration form. This needs to be completed by every new provider. The Registration process will generate a username and password and allow a provider access to the SProc.Net system.

3. The registration form will ask for details about your company:

New Supplier Registration

Step 1 of 2: Business Details

Please complete the form below with your business' information.

The form will inform you if the Business Name you enter has already been registered, in which case, please click the New User button from the home page to request a login from the system administrator for your Business, or contact us at: supplier.engagement@useadam.co.uk

* Please note it is mandatory to fill in the fields with the * next to them

1 Business Details

Please enter the basic information of your business.

Business Name: * **1.**

(Business Name)

Registered Name:

(Registered Business Name)

Website:

(Website Address)

Logo File:

(Logo File)

VAT Registered? * **2.**

(VAT Registered?)

Business Tax/VAT #: *

(Business Tax/VAT #)

How did you learn about Adam? *

2 Address/ Contact Details

Please enter the address/contact details of your business.

Location Name:

(Business Address Details)

Address 1: *

(Business Address Details)

Address 2:

Post Code: *

(If you have a non UK address please use the postcode ZZ1 1AA)

Country:

Telephone Number: *

(Telephone number)

Email Address: *

(Email Address)

Fax Number: **3.**

Input your business details as requested.

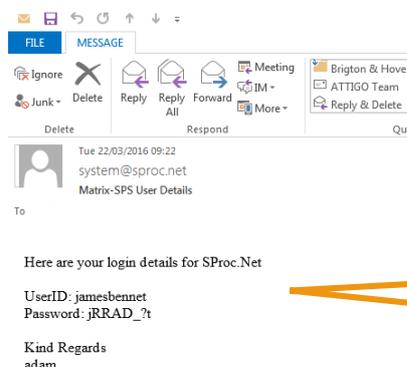
Use the drop-down to select responses to the questions asked.

Click 'Next' to continue.

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

- This page is about creating a user profile. This first user will, by default, become the Supplier Administrator for your SProc.Net account. They can create further users for your account at a later stage, include other administrators (details on page 30):

- Complete registration by clicking 'Finish'
- 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.

- From the SProc.Net login page, log in using the username and password provided. There will be an automatic prompt to change your password.

adam SProc.Net

1. Enter your username

2. Register

3. Click 'Sign In' to continue

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

Resetting Your Password

After you reset your password you need to login with your new password before having access to the system.

Enter a password that's easy for you to remember, but hard for others to guess. Consider the following:

- You must use a mixture of letters and numbers.
- Passwords must be at least 8 characters long.
- You must include at least one capital letter.
- You may not choose a password that has been used previously.
- Do not copy and paste your password from an email. Always manually type it in.

Make sure your new password meets the password criteria specified.

New Password:

Repeat Password:

1. Create a new password.

2. Click 'Reset Password' to complete.

Cancel Reset Password

- Login using the given username and new password and click 'Sign In'

adam SProc.Net

1. Enter your username

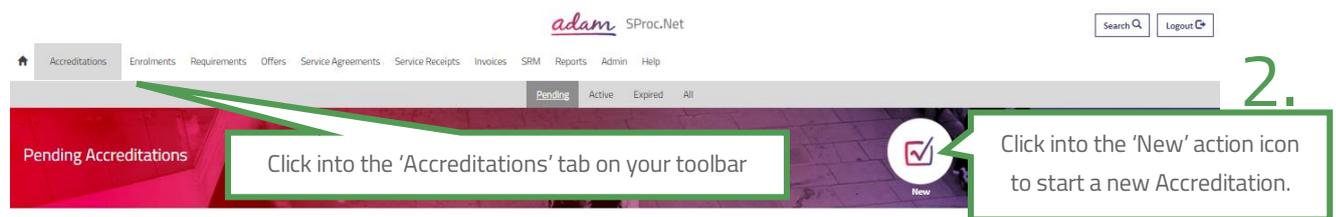
2. Enter your new password

3. Click 'Sign In' to continue

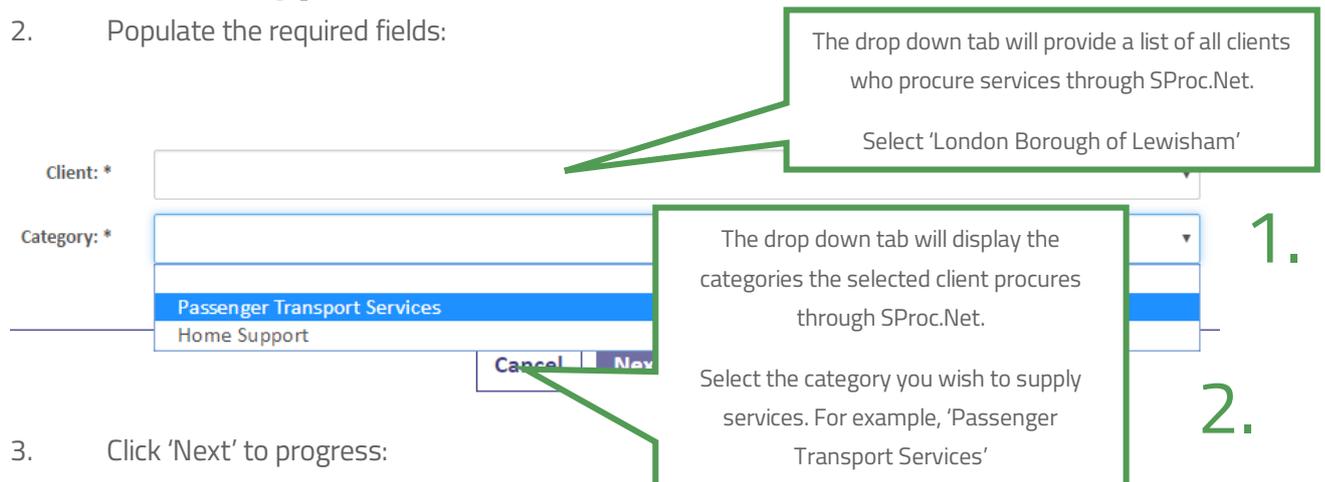
Accreditation and Enrolment

All providers need to go through Accreditation and Enrolment before they can supply to any client using SProc.Net. This involves submission of information and documentation which are set by the client as a standards threshold / minimum criteria.

1. Start this process from your homepage, select the 'Accreditation' icon along the top of the page and select 'New' from within the coloured banner



2. Populate the required fields:



3. Click 'Next' to progress:



Notes:

What is a Supply Category?

Within SProc.Net, the Accreditation and Enrolment is individual to each client-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-supply-category separately.

Client	Supply Category	Service Category
London Borough of Lewisham	Passenger Transport Services	Children's Services
		Community Services

4. On the next page you will be required to answer a series of objective questions:

+ Accreditation

1.

Answer all the listed question using the free-text fields and drop down menus on the Accreditation.

- Questions

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

Please note that the application will timeout after 30 minutes. Remember to save regularly to avoid losing any responses you have entered

Question Type: Company Information

#: 1

Question Text: What is the full name of your organisation?

Answer:

Characters Remaining: 4000 left

Question Type: Company Information

#: 2

Question Text:

What is the address of your registered office? Please enter N/A if not applicable

Answer:

Characters Remaining: 4000 left

Question Type: Company Information

#: 3

Question Text:

What is your registered website address? Please enter N/A if not applicable

Answer:

Characters Remaining: 4000 left

Question Type: Company Information

#: 4

Question Text: What is your trading status?

Use the drop down box to provide answers

Answer:

Characters Remaining:

Question Type: Company Information

#: 5

Question Text: Please specify your trading status.

Certain answers unlock additional questions.

Answer:

Characters Remaining: 4000 left

Question Type: Company Information

#: 6

Question Text:

What is your organisation's date of registration in its country of origin?

Answer:

Characters Remaining: 4000 left

Question Type: Declaration of Interest

#: 52

Question Text:

Please confirm that this individual has the authorisation to enter into the contract on behalf of your organisation.

Answer:

Characters Remaining:

Save

Save as you go!

Downloadable Templates

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

3.

Document Type	Template File Name
	Appendix 4 - Signature Document.pdf

2.

Download the documents and fill in as per the instructions, sign and return.

Upload Documents

If necessary, please upload all of the documents listed below.

Please note that documents can be pulled through automatically from previous uploads to the system - you should check and confirm

Upload all the required documents and the relevant dates

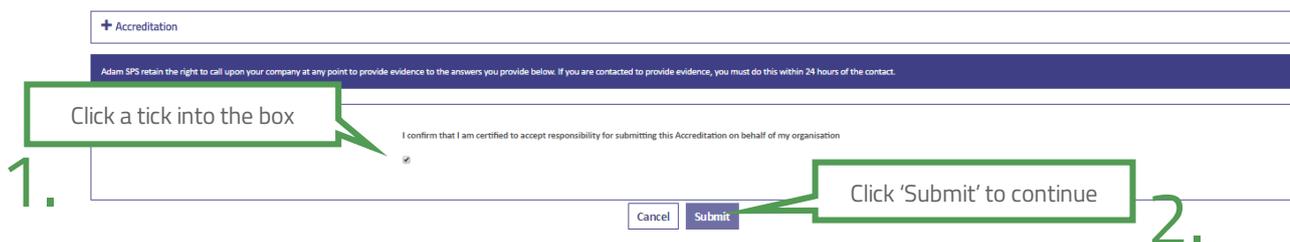
Document Type	File Name	Issue Date	Issue Number	Expiry Date
Supplier Agreement	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Self Bill Agreement	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Insurance Certificates	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Save



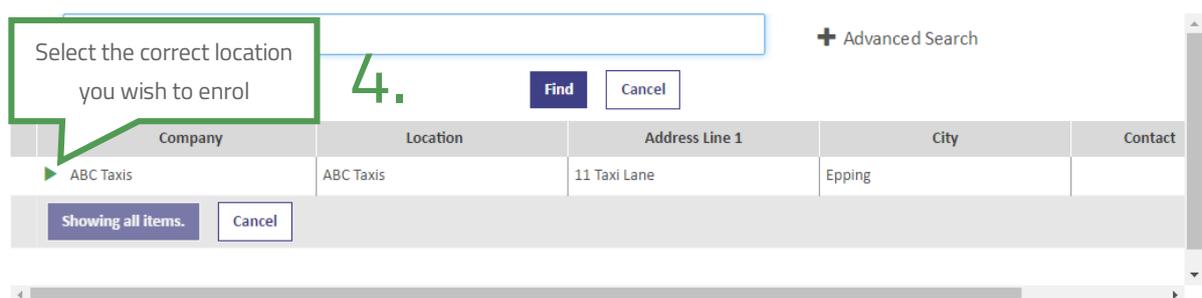
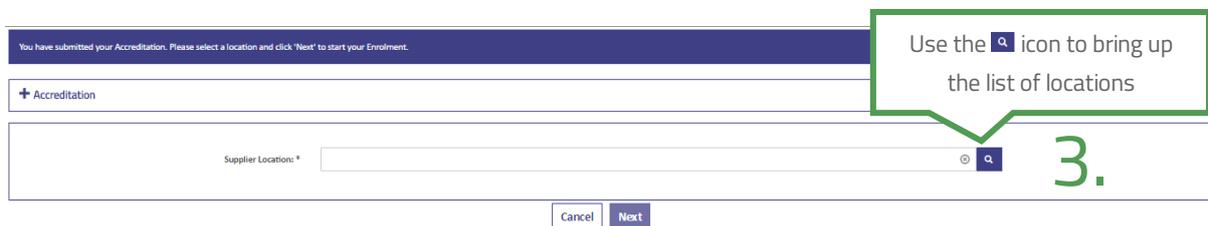
Please note, as a security feature, this page will time out if the 'Save' button is not clicked within 30 minutes and you risk losing your work.

5. Confirm you have read and understood all terms and conditions:



6. If you complete the Accreditation in one go, SProc.Net will direct you straight onto the Enrolment process

7. Select the location you wish to enrol to:



You have submitted your Accreditation. Please select a location and click 'Next' to start your Enrolment.

+ Accreditation

Supplier Location: * ABC Taxis - ABC Taxis

Click 'Next' to continue

Cancel

Next

8. You will be directed straight onto the Enrolment questions once you click 'Next'
9. Answer all listed questions, there will be a mix of drop-down and free-text responses required and some Enrolment questions will not need a response depending on your answer to previous questions. All parent and, if applicable, subsequent child questions must contain an answer for your submission to progress.
10. Once you have worked through the Enrolment questions, you will need to upload all the relevant documents required.

+ Enrolment

1.

Answer all the listed question using the free-text fields and drop down menus below, Lewisham will review these.

- Questions

Please answer all of the questions below

Please note that the application will timeout after 30 minutes. Remember to save regularly to avoid losing any responses you have entered

Question Type	#	Question	Answer	Characters Remaining
Company Information	1	Has your organisation completed the European Single Procurement Document? Please upload to space provided on your enrolment.	<input type="text"/>	
Grounds for Mandatory Exclusion	2	Regulations 57(1) and (2) Please indicate if, within the past five years you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences within the summary below and listed at https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/111111 - Participation in a criminal organisation	<input type="text"/>	
Grounds for Mandatory Exclusion	3	Please provide the date of conviction and the reasons for conviction.	test	3996 left //
Grounds for Mandatory Exclusion	4	Please provide the identity of who has been convicted.		4000 left //
Grounds for Mandatory Exclusion	5	If the relevant documentation is available electronically please provide the web address, issuing authority, precise reference of the documents.	test	3996 left //
Grounds for Discretionary Exclusion	6	Have measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion?	<input type="text"/>	
Grounds for Mandatory Exclusion	7	Regulations 57(1) and (2) Please indicate if, within the past five years you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences within the summary below and listed at https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/111111 - Corruption	No <input type="text"/>	

11.

Download Documents

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

Document Type	Template File Name
Contract Details	Contract Details.docx
Declaration Statement	Declaration Statement.docx

Download any included documents and review/complete as appropriate.

Upload Documents

Please upload all of the documents listed below.

Please note that documents can be pulled through automatically from previous uploads to the system - you should check and confirm each one before submission.

Please note that the application will timeout after 30 minutes. Remember to save regularly to avoid losing any work

Upload requested documents, with relevant dates

Document Type	File Name	Issue Date	Issue Number	Expiry Date	Description
Safeguarding Policy	Route Tenc 	01/01 	1111	01/01 	If you have answered 'Yes' to Q81, please upload your policy. If you have answered 'No' to Q81, please insert the required details, sign, and upload the provided policy to confirm you agree to adopt and implement this.
Health and Safety Policy	<input type="text"/> 	<input type="text"/> 	<input type="text"/>	<input type="text"/> 	Please upload your Health and Safety Policy.
Financial Information	<input type="text"/> 	<input type="text"/> 	<input type="text"/>	<input type="text"/> 	Please upload your Financial Information.
Information Commissioner's Office Evidence	<input type="text"/> 	<input type="text"/> 	<input type="text"/>	<input type="text"/> 	Please upload evidence of your Information Commissioner's Office registration.

12.

Please upload details of up to three contracts, in any combination from either the public or private sector that is relevant to the Council's requirement. Contracts for supplies or services should have been performed during the past three years.

Contract Details

Safeguarding Method Statement Please upload your response to Q85

Declaration Statement Please download and complete this document to reupload.

Contract Details

Declaration Statement

Save

Save as you go, to prevent data loss

Upload Optional Documents

If necessary, please upload all of the documents listed below.

Please note that documents can be pulled through automatically from previous uploads to the system - you should check and confirm each one before submission.

Document Type	File Name	Issue Date	Issue Number	Expiry Date	Description
European Single Procurement Document	<input type="text"/> <input type="button" value="📄"/>	<input type="text"/> <input type="button" value="📅"/>	<input type="text"/>	<input type="text"/> <input type="button" value="📅"/>	If you have responded 'Yes' to Q1, please upload your completed European Single Procurement Document.
Parent Company Financial Information	<input type="text"/> <input type="button" value="📄"/>	<input type="text"/> <input type="button" value="📅"/>	<input type="text"/>	<input type="text"/> <input type="button" value="📅"/>	Please upload your Parent Company Financial Information.

Save

Upload any optional documents that may be required for your application.

13. As a provider, you must select which Service Categories you can supply
 - ➔ A Service Category is the breakdown of the Supply Category into smaller segments
 - ➔ At Enrolment, you will stipulate which categories of services you can supply; subsequently you will only be able to make Offers against Requirements relevant to these selections.

1.

Click 'Find more items' icon to bring up a list of the Service Categories.

2.

Click ticks into all relevant categories and then click 'Add' followed by 'Done' to complete.

Service Category	Supply Category	Display
Children Services	Passenger Transport Services	<input checked="" type="checkbox"/>
Community Services	Passenger Transport Services	<input type="checkbox"/>

14. Specify your bank details.

Bank Details

Please Enter The Bank Details For This Location.

Bank Name: *

Account Name: *

Sort Code: *

(Please enter your sort code excluding dashes or spaces. For all UK based accounts this will be 6 digits.)

Account Number: *

(Please enter your account number excluding dashes or spaces. For all UK bank accounts this will be 8 digits.)

Please enter the details of the invoice contact for this location.

Invoice Contact Name:

Address Phone: *

Email Address: *

Email Address 2:

Address Line 1: *

Address Line 2:

Address City: *

Country: *

Post Code: *

County: *

Effective Date: *

I agree that I am certified to accept responsibility for submitting this information on behalf of my business *

2.

Make sure you click a tick into the T&Cs box

Click 'Finish' to continue

3.

15. Click 'Submit' to complete:

Enrolment / Submit Enrolment Step 1 of 1

Enrolment

To complete your Enrolment please click the Submit button below

Click 'Submit' to complete

7.

16. The status of the Enrolment will show as submitted:

Enrolment

Current Status:
This Enrolment has been submitted but is waiting for the Accreditation to be approved before it starts it's own approval process.

Next Steps:
Please wait for the approval process to be completed.

Enrolment - EN9859

Re-Starting an Enrolment from Draft

If you have started an Enrolment and saved your progress you can continue from where you finished by locating the Enrolment using the 'EN' reference number

1. Click into the relevant object to view your draft Enrolment

The screenshot shows the 'Enrolments' dashboard. A green callout box labeled '1.' points to the 'Enrolments' menu item in the top navigation bar. Another green callout box labeled '2.' points to the 'Pending' filter button. A third green callout box labeled '3.' points to a table of draft enrolments. The table has columns for Enrolment ID, Status, Location, Supplier Name, Location, and Address Line 1.

Enrolment	Status	Location	Supplier Name	Location	Address Line 1
EN15450	Draft	London Borough of Lewisham	Passenger Transport Services	Office 2	250 Midsummer Boulevard
EN15449	Draft	London Borough of Lewisham	Passenger Transport Services	Lewisham Cars	249 Midsummer Boulevard

2. The draft progress will show which sections are incomplete

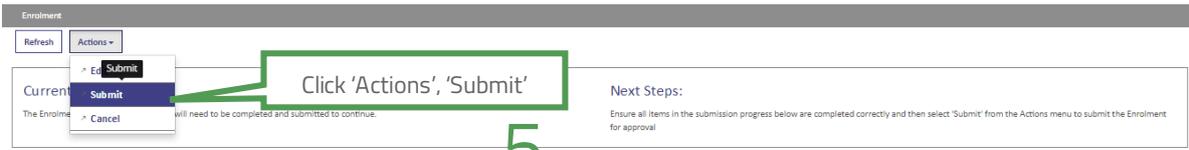
The screenshot shows the 'Enrolment' summary page. It includes a 'Current Status' section with a message: 'The Enrolment is still in draft status and will need to be completed and submitted to continue.' Below this is a 'Draft Progress' section with four checklist items. The first three items have red 'X' marks, and the last one has a green checkmark. An orange callout box labeled 'Item is in 'Draft'' points to the first three items.

3. From the Enrolment summary page, to edit the information click into the 'Actions' icon:

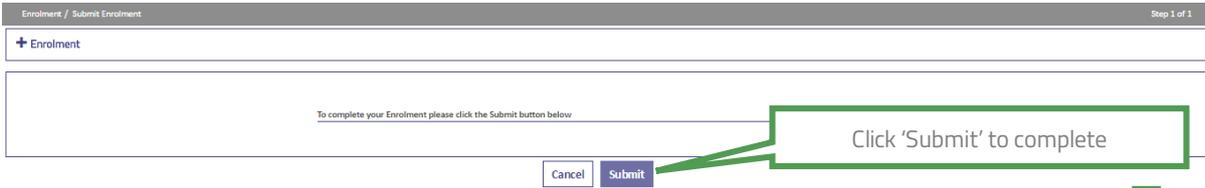
The screenshot shows the 'Enrolment' summary page with the 'Actions' menu open. A green callout box labeled '4.' points to the 'Edit' option in the menu. The 'Current Status' section is visible above the menu.

Edit the information as needed, replacing any draft text/characters previously used to save.

4. This process can be repeated as many times as needed, clicking 'Save' frequently to save your current workings.
5. When complete use the 'Actions' icon to 'Submit':



Click 'Submit' to complete:



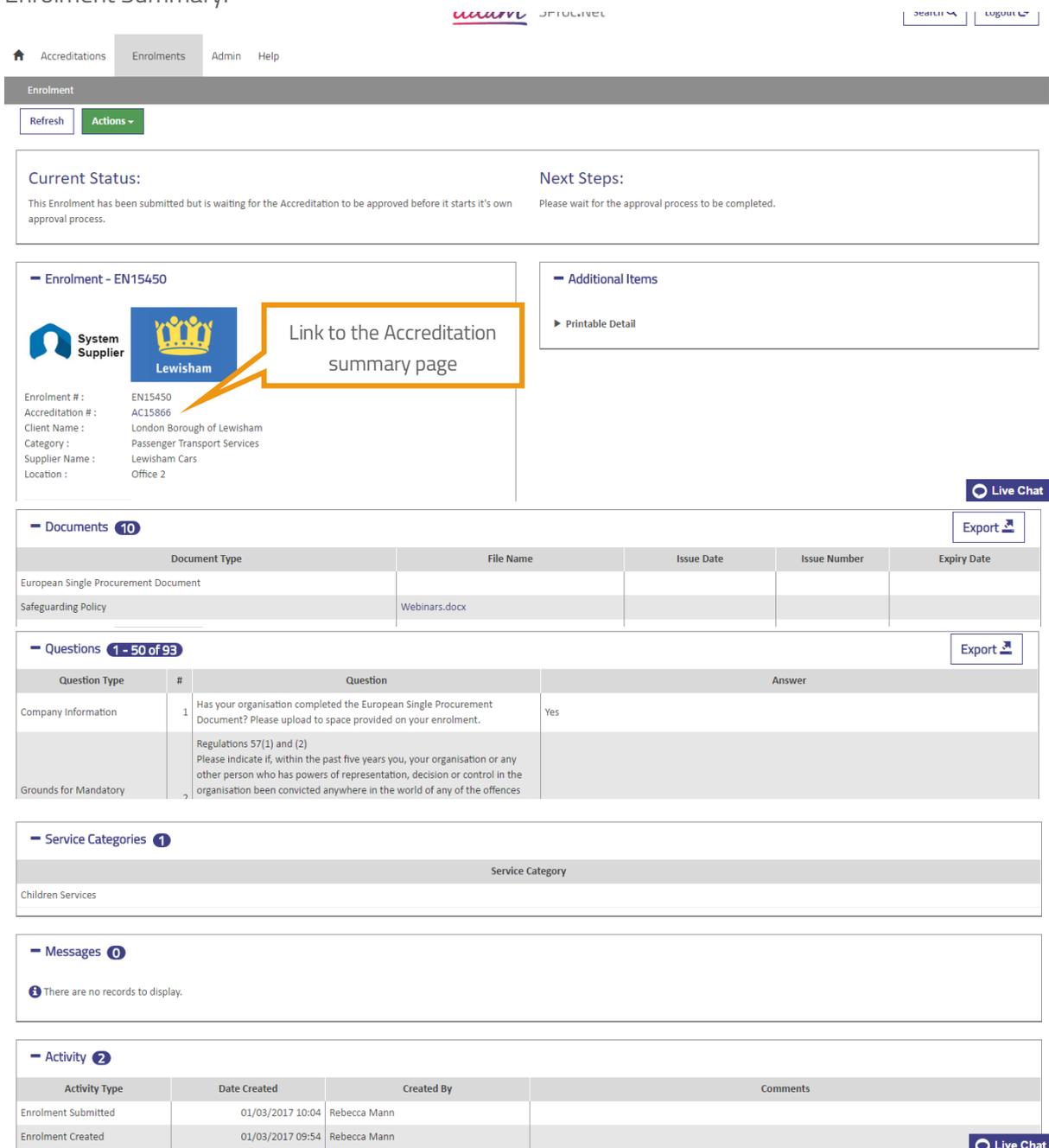
6. The status of the Enrolment will show as submitted:



Summary Pages

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

Enrolment Summary:



Current Status:
This Enrolment has been submitted but is waiting for the Accreditation to be approved before it starts its own approval process.

Next Steps:
Please wait for the approval process to be completed.

Enrolment - EN15450

System Supplier: Lewisham

Enrolment #: EN15450
 Accreditation #: AC15866
 Client Name: London Borough of Lewisham
 Category: Passenger Transport Services
 Supplier Name: Lewisham Cars
 Location: Office 2

Additional Items

- ▶ Printable Detail

Documents 10

Document Type	File Name	Issue Date	Issue Number	Expiry Date
European Single Procurement Document				
Safeguarding Policy	Webinars.docx			

Questions 1 - 50 of 93

Question Type	#	Question	Answer
Company Information	1	Has your organisation completed the European Single Procurement Document? Please upload to space provided on your enrolment.	Yes
Grounds for Mandatory	2	Regulations 57(1) and (2) Please indicate if, within the past five years you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences	

Service Categories 1

Service Category
Children Services

Messages 0

There are no records to display.

Activity 2

Activity Type	Date Created	Created By	Comments
Enrolment Submitted	01/03/2017 10:04	Rebecca Mann	
Enrolment Created	01/03/2017 09:54	Rebecca Mann	

Accreditation Summary:

The screenshot shows a web interface for accreditation management. At the top, there are navigation tabs: 'Accreditations', 'Enrolments', 'Admin', and 'Help'. Below this is a header for 'Enrolment' with 'Refresh' and 'Actions' buttons. The main content area is divided into two columns: 'Current Status' and 'Next Steps'. The 'Current Status' section states: 'This Enrolment has been submitted but is waiting for the Accreditation to be approved before it starts it's own approval process.' The 'Next Steps' section states: 'Please wait for the approval process to be completed.' Below these are two expandable sections: 'Enrolment - EN15450' and 'Additional Items'. The 'Enrolment - EN15450' section displays logos for 'System Supplier' and 'Lewisham', along with a list of details: Enrolment #: EN15450, Accreditation #: AC15866, Client Name: London Borough of Lewisham, Category: Passenger Transport Services, Supplier Name: Lewisham Cars, and Location: Office 2. A callout box with an orange border and lines pointing to the 'Current Status' and 'Enrolment - EN15450' sections contains the text: 'Review the status of the enrolment to see if you have been approved'. A 'Live Chat' button is visible in the bottom right corner.

Enrolment

Refresh Actions

Current Status:
This Enrolment has been submitted but is waiting for the Accreditation to be approved before it starts it's own approval process.

Next Steps:
Please wait for the approval process to be completed.

Enrolment - EN15450

System Supplier

Lewisham

Enrolment # : EN15450
Accreditation # : AC15866
Client Name : London Borough of Lewisham
Category : Passenger Transport Services
Supplier Name : Lewisham Cars
Location : Office 2

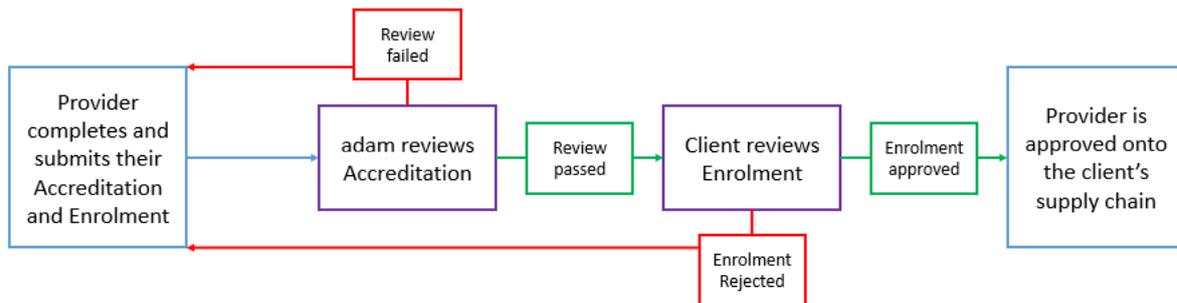
Additional Items

Review the status of the enrolment to see if you have been approved

Live Chat

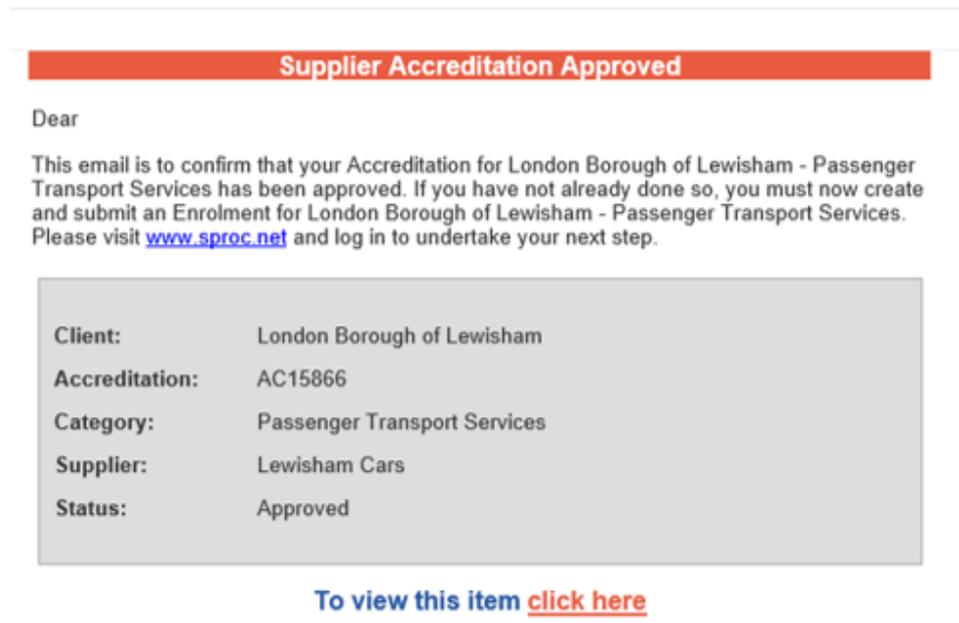
Review / Approval Process

- ➔ Once you have completed the Accreditation and Enrolment process it will immediately go to *adam* for review
- ➔ The submitted Accreditation will be reviewed and approved by *adam*
- ➔ The Enrolment submission will be reviewed and accepted by *adam*
- ➔ Once *adam* has completed their review, the Enrolment will be sent to the London Borough of Lewisham for approval
- ➔ If there are any issues with either submission, then the item can be failed by *adam* or the client and you will receive a notification email and will have the opportunity to edit and resubmit the failed item

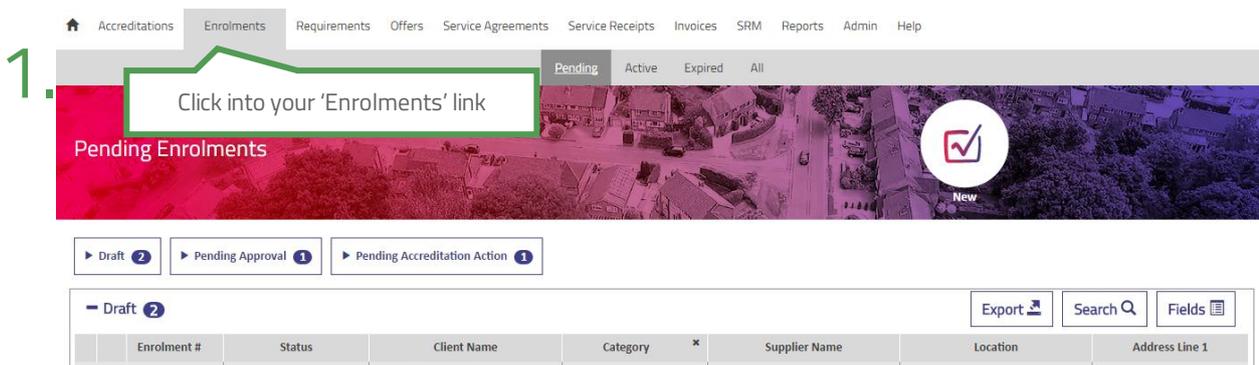


Email Notifications

1. You will receive an email to inform you if your Accreditation/Enrolment application has been successful or not:



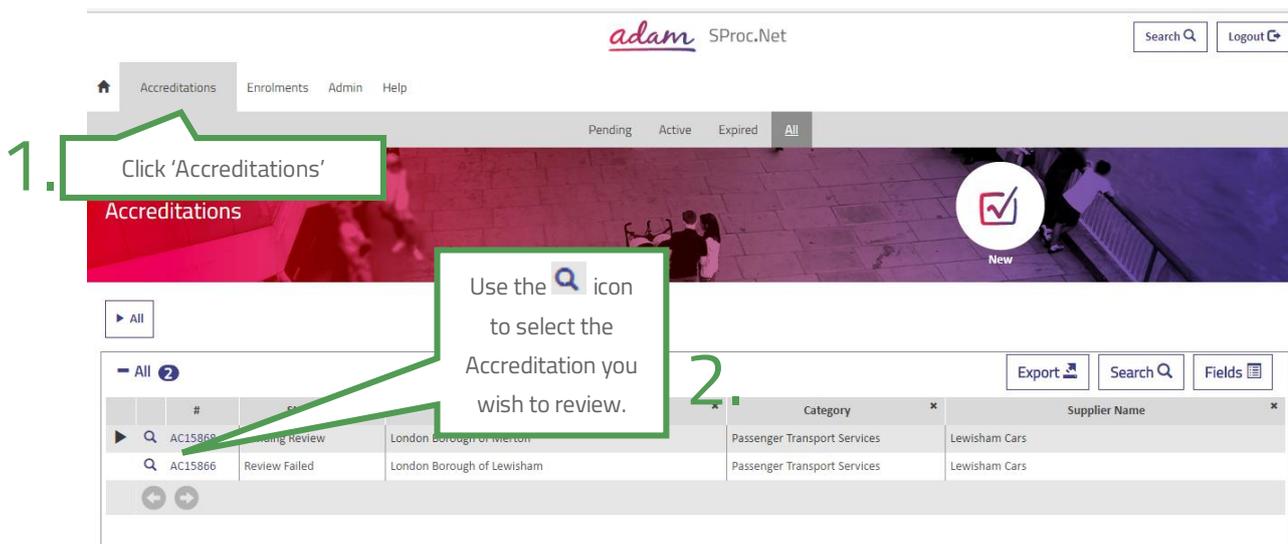
2. You will see all the details of your Accreditation/Enrolment when you login to SProc.Net:



Resubmitting a Failed or Rejected Accreditation or Enrolment

- ➔ The steps below show reviewing and re-submitting a failed Accreditation.
- ➔ The process to review and re-submit a failed or rejected Enrolment is exactly the same but starting from the 'Enrolments' tab on your SProc.Net homepage

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

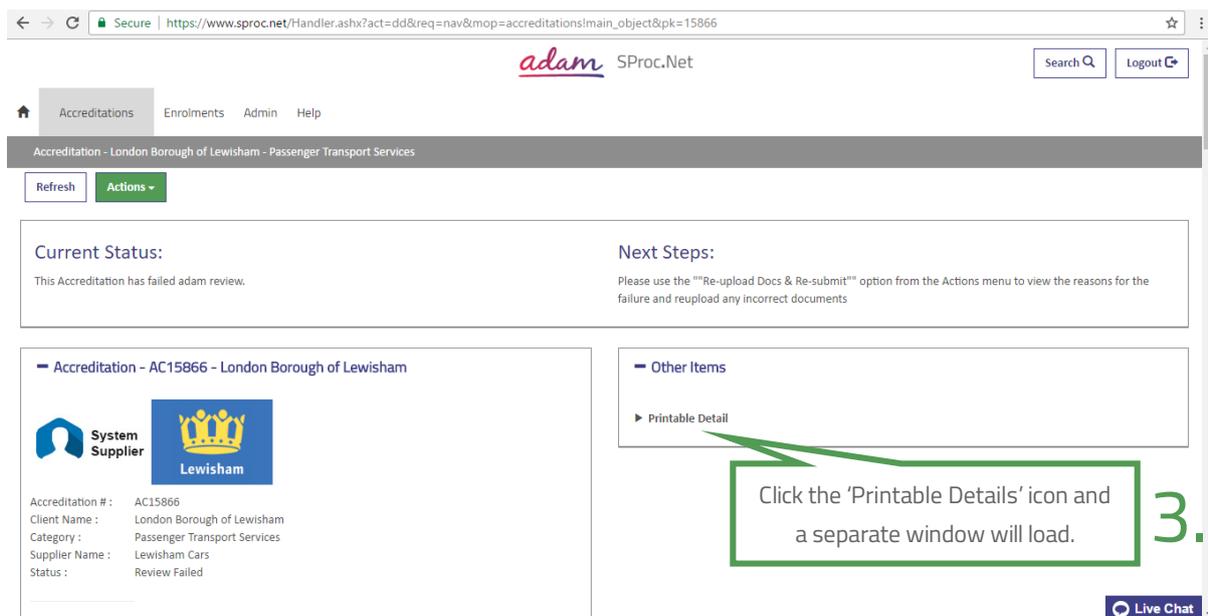


1. Click 'Accreditations'

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

#	Category	Supplier Name
AC15866	Passenger Transport Services	Lewisham Cars
AC15866	Passenger Transport Services	Lewisham Cars

2. This will show you the Accreditation summary page:



3. Click the 'Printable Details' icon and a separate window will load.

Current Status:
This Accreditation has failed adam review.

Next Steps:
Please use the "Re-upload Docs & Re-submit" option from the Actions menu to view the reasons for the failure and reupload any incorrect documents

Accreditation - AC15866 - London Borough of Lewisham

System Supplier: Lewisham

Accreditation #: AC15866
Client Name: London Borough of Lewisham
Category: Passenger Transport Services
Supplier Name: Lewisham Cars
Status: Review Failed

Other Items

- Printable Detail

3. This document will show you all the Accreditation information and the reason it was failed:

SProc.Net - Google Chrome

Secure | https://www.sproc.net/ReportViewSA.aspx?req=rpt&rppl=043dedfe-7a52-4ca7-ac68-b690ac585df2

Accreditation

#: 15866 **Status:** Review Failed

Client: London Borough of Lewisham **Category:** Passenger Transport Services

Supplier: Lewisham Cars
Status: Review Failed

Description:

Created by: Rebecca Mann
 Created: 01/03/2017 09:09
 External Ref.
 Expiry Date:
 Expired: False
 Approve by Date:
 Date Approved.
 Date Submitted. 01/03/2017 09:20

Questions

Question Type	Question	Answer
Company Information	Please specify your trading status	

Review the details of why the Accreditation was failed.

Documents - Current

Document Type	Filename	Last Review Date	Issue Date	Issue Number	Expiry Date	Review Passed	Comments
European Single Procurement Document		13/07/2016 12:07				True	
Employer's Liability Insurance	Training Document.docx	13/07/2016 12:07	03/07/2016 01:00		16/11/2016	True	
Public Liability Insurance	Training Document.docx	13/07/2016 12:07	03/07/2016 01:00		23/09/2016	True	
Licensing Information	Training Document.docx	13/07/2016 12:07	10/07/2016 01:00		26/10/2016	False	Document is out of date

This IfnVocab(Accreditation, accreditation, P) contains no historical documents

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

4. From the Accreditation summary page:

Accreditation - [ID]

Refresh **Actions**

- New Enrolment
- Re-upload Docs & Re-submit

Current

This Accreditation has failed adam review.

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

1.

Please use the "Re-upload Docs & Re-submit" option from the Actions menu to view the reasons for the failure and reupload any incorrect documents

5. Update the required information:

Download Documents

Document Type	Old File Name	Review Passed	Failure Reason	Comments
European Single Procurement Document		Yes		
Employer's Liability Insurance	Training Document.docx	Yes		
Public Liability Insurance	Training Document.docx	Yes		
Licensing Information	Training Document.docx	No		Document is out of date

Re-upload Documents

Please upload new versions of the documents below where required. The pane above shows the details of the last review and should indicate which documents require change

Document Type	Old File Name	New File Name	Issue Date
European Single Procurement Document		<input type="text"/>	<input type="text"/>
Employer's Liability Insurance	Training Document.docx	<input type="text"/>	03/0 <input type="text"/>

Using the upload icon, upload the revised documentation.

1.

Submit Click 'Submit' to continue

2.

6. Confirm you agree to the terms and conditions.

Accreditation - London Borough of Lewisham - Passenger Transport Services / Re-upload Documents / Submit Accreditation Step 1 of 1 - Submit Accreditation

Accreditation

adam 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 adam- terms and conditions of Accreditation.

I confirm that I am certified to accept responsibility for submitting this Accreditation on behalf of my organisation

Submit Click 'Submit' to continue

Click a tick into the box

3.

4.

7. The Accreditation submission will have updated to show it has been re-submitted to *adam* for review:

Accreditation - London Borough of Lewisham - Passenger Transport Services

Refresh Actions

Current Status:
This Accreditation is pending adam review.

Next Steps:
Create a new Enrolment from the Actions menu if you haven't done so already. You will receive an email to confirm that your Accreditation has been submitted and is being reviewed by adam.

Accreditation status updated

Creating a New User

➔ Once you have set-up your SProc.Net account, you can create additional users who can also access the system.

There are two ways a new user can be added:

- a) New user can request to join (user will input their own information and Administrator will approve)
- b) Administrator user can add user onto SProc.Net

The next section of this guide will go through both of the above methods step-by-step.

New User Request – Created by the new user

Created by the user:

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

The screenshot shows the SProc.Net login page. At the top, it says 'adam SProc.Net' and 'Making public services *personal* again.' Below this is a 'Scheduled Maintenance' banner. The main content area has two sections: 'Please sign in' with fields for 'User name' and 'Password', and a 'Sign in' button; and 'Register' with buttons for 'New User' and 'New Supplier', and a checkbox for 'Email us and register your interest'. A green callout box with the number '1.' points to the 'New User' button, with the text 'Click into the 'New User' icon to start the process.'

2. This will direct you to the new user details page:

New User Registration

To register as a new user please insert as much information as possible in the fields below.

- If you are an existing user and want to reset your password, please go back to the home page and then click the "Forgotten password" link.
- It is mandatory to fill in the fields with the * next to them

1 Business Details
Please select either Client or Supplier dependant on the company you work for. Then use the search field to select the company.

User Role: *

2 About You
Please provide a your personal details below.

First Name: *

Last Name: *

Email Address: * **2.** Input all your details.

Phone #: * **2.** Telephone number)

Locations: * **2.** Company Location)

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

Additional Information: **3.** Input further information for the approver to review.

4. Click 'Register' to complete.

Cancel Register

Once this form has been completed, 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
2. This will take you to a list view of all your users
3. Click into the new user to view their details

1.

Click 'Admin' and then 'Users'

2.

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

Name	Email Address	User ID	Role
11		11	Quality Care
Alison Maclean		alisonmaclean	Quality Care
Ben Little	christine.maclean@attgo-training.com	benlittle	Quality Care
Christine Smith			Quality Care
David Smith		dsmith873	Quality Care
David Smith		dsmith460	Quality Care
Drew Goodchild	ccistine.maclean@attgo-training.com	ccistine.maclean@attgo-training.com	Quality Care
Drew Goodchild	ccistine.maclean@attgo-training.com	drewgoodchild	Quality Care

4. View the users details

3.

Click the user's name link.

User - Drew Goodchild (Quality Care)

Refresh Actions

Drew Goodchild (Quality Care)

Drew Goodchild
Quality Care
Status: Registered
Role: Supplier
Updated: 07/04/2016 11:34

Email: ccistine.maclean@attgo-training.com
Telephone:
Last Login:

Actions

Standard Notifications **169** Community Reviews

Notes **0** New

There are no records to display.

Review their details and select their account settings:

Please note, all 'Role Names' must be assigned correctly to reflect authorisation levels within your business.

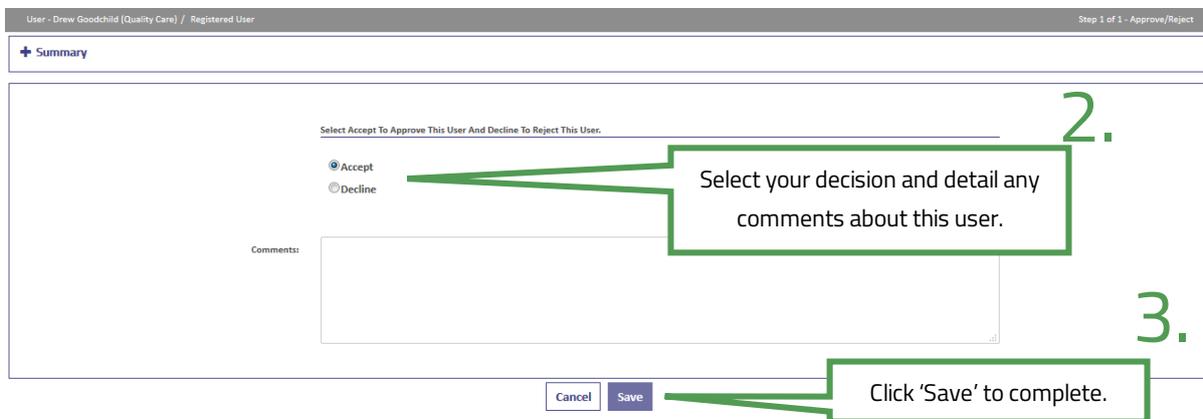
Role Name	Access	Example
Supplier Administrators	Access to view & approve all process steps	Supply branch manager
Supplier Executives	Access to view & approve all process steps within a defined service area	Head of service with supply branch
Supplier Finance	Access to view supplier bills and invoices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

Table 1.0

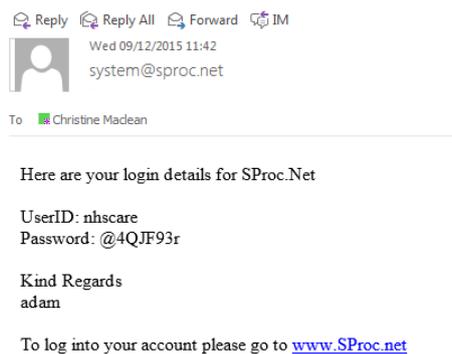
5. Once complete you will need to approve the user:



6. Accept or decline the new user application:



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



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 click into the 'Admin' tab on your toolbar
3. Select the 'Users' link
4. Select the 'New' icon

1.

Click 'Admin' and then 'Users'

2.

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

Name	Email Address	User ID	Location	Role Name
11		11	Quality Care	SupplierManagers
Alison Maclean		alisonmaclean	Quality Care	SupplierAdministrators

5. Complete the user's details and role:

3.

4.

Input the user's details.

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

5.

Click 'Save' to complete.

See Table 1.0 on page 56 for User Role explanations

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

Need More Support?

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' icon on your homepage to access your system help and support.

The screenshot shows the homepage navigation menu with 'Help' highlighted. Below the menu is a 'Welcome Training 1' banner and several service icons: 'New Offer', 'New Service Receipt', and 'New User'. A section for 'Priority Items' is followed by four support options: 'Help' (with a 'Help Guides' button), 'Raise Query' (with 'Create New' and 'Browse' buttons), 'Live Support' (with a 'Chat with us now' button), and 'Operations Centre' (with a phone number '0871 474 0332').

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:

a) Click here to view all training resources available

b) Click here to raise a speak to someone on *adam* Live Support

The screenshot shows the 'Help' page with a search bar and 'Logout' button. The 'Help' menu item is selected, showing sub-options: 'Help', 'FAQ', 'Queries', and 'Help Guides'. Below is a 'Frequently Asked Questions (FAQs)' section with a search input. The support options are the same as in the previous screenshot, but the 'Live Support' icon is highlighted by callout box 'b'.

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

Accreditations Enrolments Requirements Offers Service Agreements Service Receipts Invoices SRM Reports Admin Help

Help FAQ Queries Help Guides

Help Guides

Help Guides 0

There are no Training Documents available

Client specific user guides will display the client's name in the document filename

b) Live Support will allow you to speak with a member of the *adam* operation team:

Live Support

Chat with us now

Click 'Chat with us now' to open the conversation window