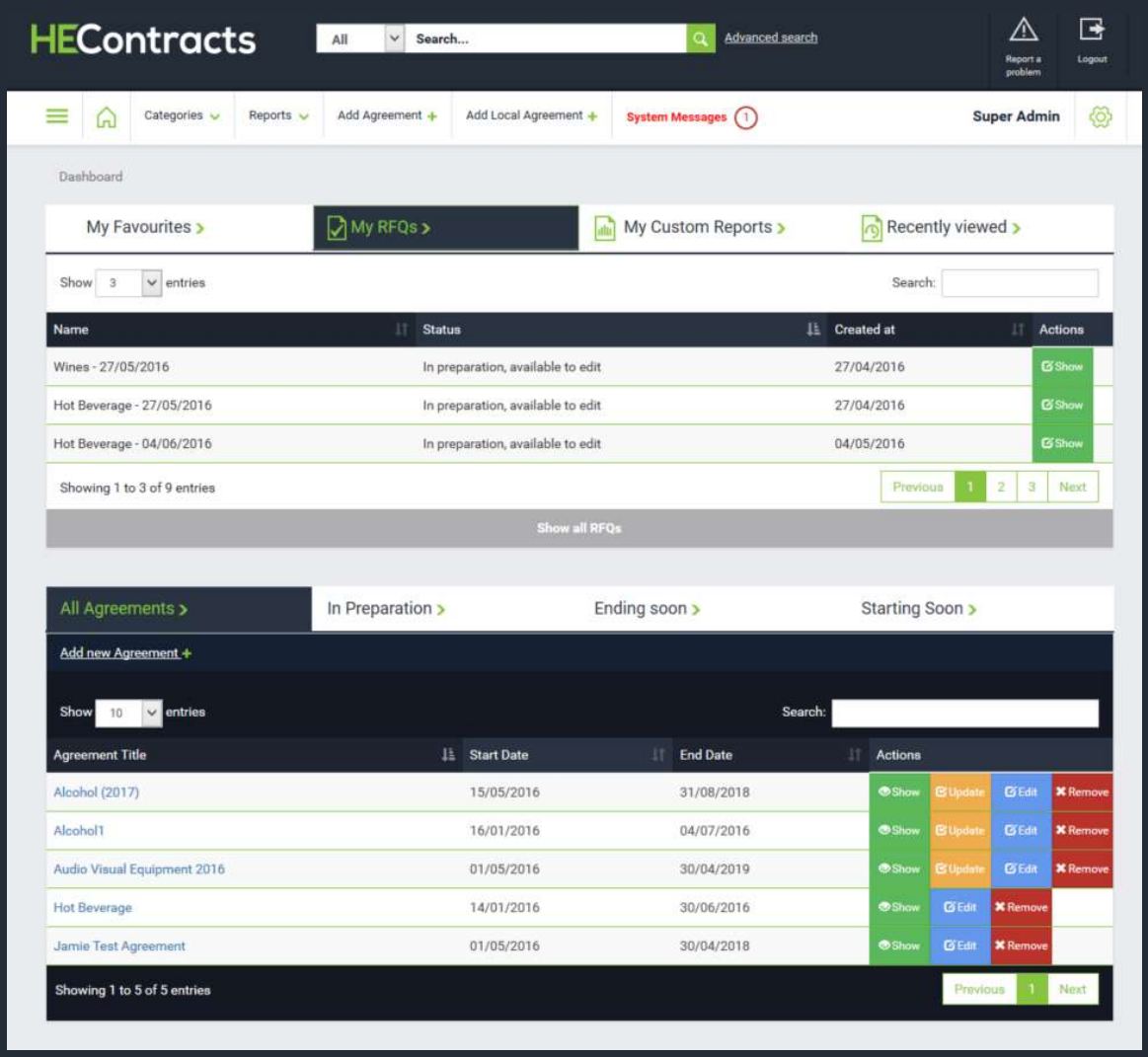
HEContracts



End User Guide

www.hecontracts.co.uk

Guide Overview

The HE Contracts system was commissioned by PEL (Procurement England Limited) to replace the uniBuy system. As the HE Contracts system has been developed solely for PEL, stakeholders from each of the English consortia as well as some institution users agreed the exact function needed for this bespoke new system.

It has been built with the aim of being simple and intuitive to use, we welcome your feedback on that.

This guide is meant as a resource to aid you with your first use of the system, or to refer back to when you use a new part of the system. Within the system there are also a set of video tutorials accessed by pressing the Support button on the main menu from anywhere in the system. We particularly recommend the HEC Overview video, which in just 9 minutes gives you a complete live tour of the system.

When you need support or have found a problem there is a built in function to report this which we'll discuss in this guide, and of course you can get in touch with the support team by email too, via support@hecontracts.co.uk We have a friendly team waiting to help you.

Feedback is very important to us too. This is a brand new system and PEL has a desire to improve and develop this to be even more beneficial to members. Please send any feedback or ideas for improving the system to support@hecontracts.co.uk

In this guide

Agreement Structure

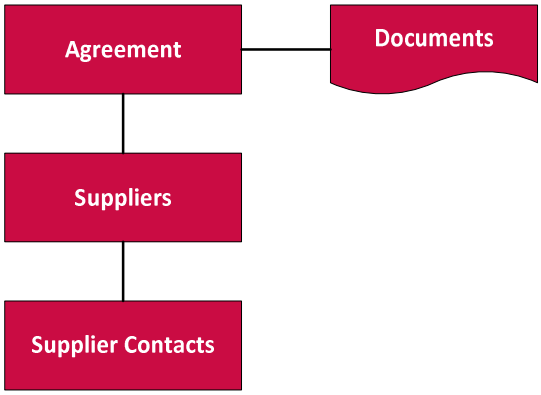
As HE Contracts was a bespoke build for the exact requirements of the consortia and institutions the structure of the agreements has been created as it is needed, and not how it was previously structured.

We have:

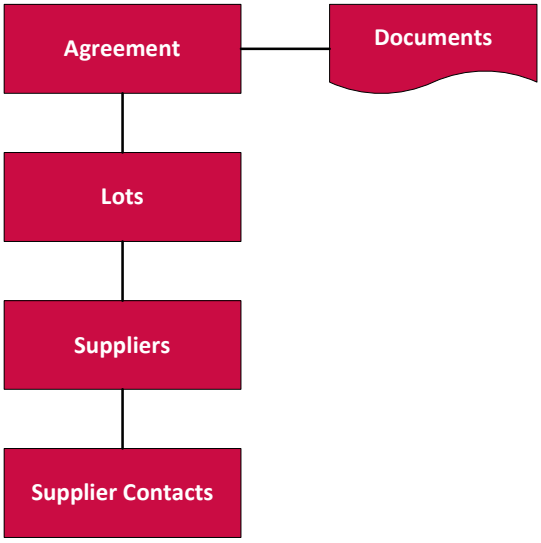
- Agreements
- Lots
- Suppliers
- Supplier Contacts
- Documents

Agreement Structure

Without Lots



With Lots



Documents are all stored against the agreement in a set of folders that categorise the type of document, so there are no longer agreements attached to individual suppliers and everything is in one place per agreement.

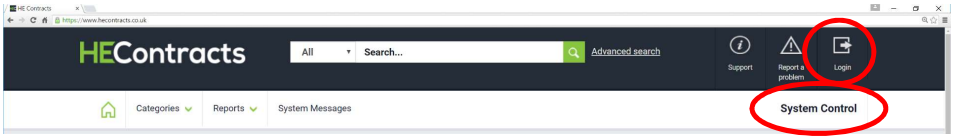
Accessing HE Contracts

You can access HE Contracts in two ways (depending on how your institution has been set up by the consortium you are a member of):

- With IP access
- With a personal username & password

IP Access

IP (Internet Protocol) is a unique address sent out by your computer (just like caller display for a telephone). Your computer broadcasts your IP address and when you visit the HE Contracts website it looks for your IP address and checks if this is known within the system. If it matches, it will grant immediate access and you will see the screen as below:



Note the button on the top right will show 'Log In' and the user name shown in the white line beneath will show your institution name.

Pro's & Con's of IP Access:

- ✓ Great for immediate access, and no need for users to have individual usernames and passwords
- ✘ You can't use HE Contracts when you are outside your institution
- ✘ No access to personalised premium features (Favourites, RFQ, Custom Reports, Update notifications)
- ✘ Students and any guests on your institution network will also gain access

If you would like to use IP Access but the system does not grant you access it will show a login screen.
Contact your consortium to have them add your IP address and you will then have immediate access.

Username & Password

Having a username and password is the recommended way of using HE Contracts.
We've taken the pain out of administering new accounts with our auto approval system. Ask your consortium to add your email domain to the system (for example, University of Manchester's email domain is manchester.ac.uk) and anyone registering with an email address that ends @manchester.ac.uk will be able to register simply and have immediate access to the system.

Pro's & Con's of Username access:

- ✓ Great to control exactly who can access HE Contracts
- ✓ Set user levels to allow certain privileges to each user
- ✓ Easy to stop access should someone leave
- ✓ Can access HE Contracts from outside of the institution
- ✓ Allows full access to all premium personalised features (Favourites, RFQ, Custom Reports, Update notifications)
- ✘ Needs a small amount of user management if the auto approve domains are not in HE Contracts

To have your institution domain(s) added to HE Contracts please speak to your consortium.
To register for access visit www.hecontracts.co.uk:

- If you see the login screen click on Register and follow the simple steps
- If you don't see the login screen as the system has recognised your IP address just click on Log In on the top right of the menu and then click on Register

Using HE Contracts

The Dashboard

This is the home page of HE Contracts, and makes it very easy to navigate where you would like to get to from this one central place.

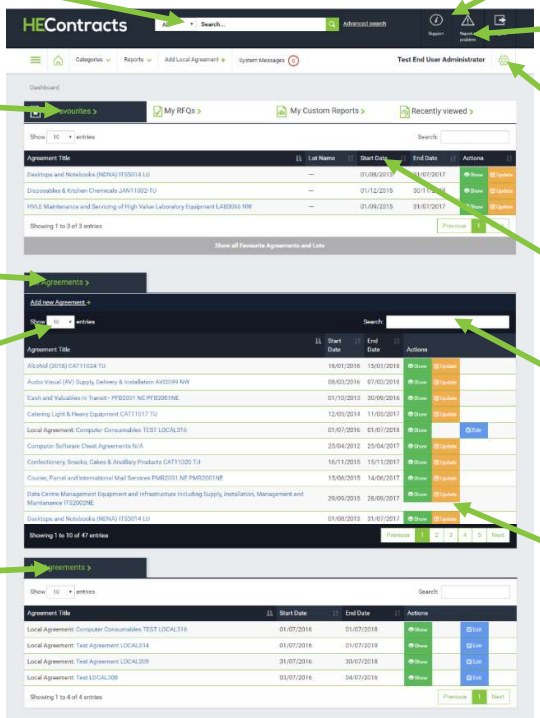
Powerful search box, search for any agreement, lot, supplier or document here

For logged in users; 4 tabs showing your favourite agreements, RFQ's, Custom Reports and recently viewed agreements

All agreements available to you in the system, listed A-Z

On all lists you can change the number of results you see in the list

For logged in users; see agreements you have created in the system



Support button, in here you will find the video tutorials as well as how to contact our support team

Report a problem, you can raise an issue with how the system is working, or about the details of an agreement that doesn't look right

For logged in users; you can edit your user details (including password) by clicking here

You can sort all headers A-Z/0-9 just by clicking on the header

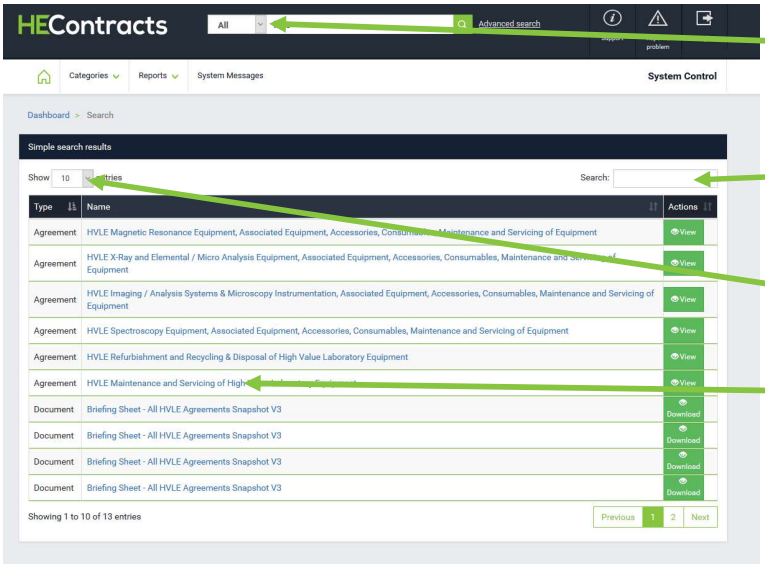
In each listing this additional search box allows you to filter down within the results quickly

For logged in users; an orange 'Update' box means there have been updates made to this agreement since you last viewed it

Searching

At the top of every page of the system you have the search bar. You can type in one or multiple words to search for and press enter or the magnifying glass icon to display the results.

In our example below we searched for 'HVLE' and it returned 13 results:



You can use the search filter at the top to only give you results for Agreements, Lots, Suppliers or Documents

You can filter down your results by typing into this box for an immediate result

You can change how many results you see on this page by changing the show number here

Click on a result name to open the result page

You can also click on the 'Advanced search' link next to the search box, this opens up a page of additional options including; searching for expired agreements, selecting a particular consortium, a particular agreement manager, date ranges etc.

Viewing Agreements

You will have accessed an agreement either from the dashboard listings or from a search.

For logged in users; you can click this button to add to your favourites

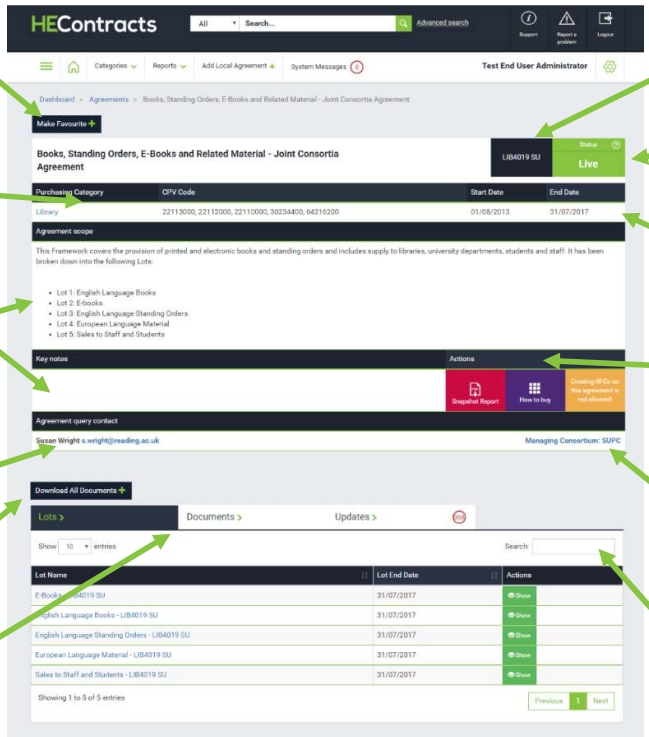
This line shows the category and CPV code(s). Category is a link, if you click this it will show you all agreements in this category

The agreement scope and key notes give details about the agreement

The agreement manager contact details (email is a link to send them an email)

Download all documents will download a zip file of every document on this agreement

These tabs show you Lots, Contacts, Documents and Updates



The agreement ID

The status of the agreement (can be Live, Suspended or Ended)

Agreement start, end and sometimes possible extension dates

For logged in users, these buttons show the agreement summary report, how to buy on this agreement and RFQ status

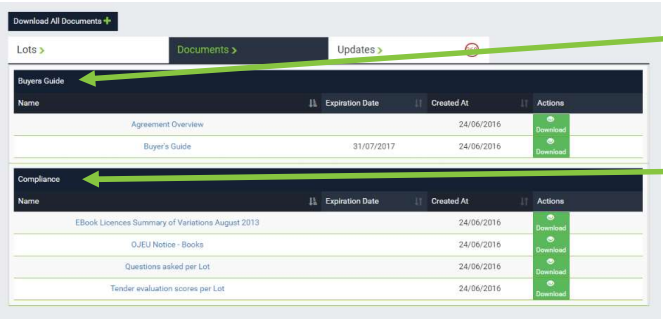
The consortium that manage this agreement, click on it to see other agreements they manage

Use this search box to filter down if there is a long list of lots or contacts

The example agreement above has lots, so to see the suppliers and contacts available click on the lot name to view these.

If the agreement does not have lots, the 'Lots' tab is replaced with 'Contacts'

When you click on the 'Documents' tab it displays category folders so you can easily find the type of document you need:



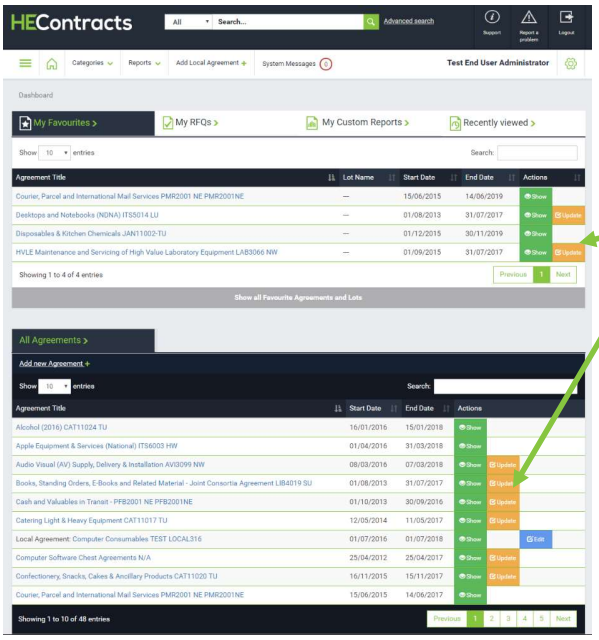
Buyers Guide folder

Compliance folder

Click on the document name to view it.

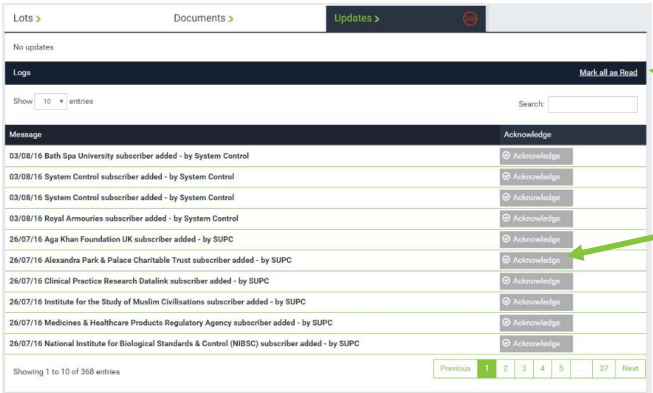
Viewing Agreements (continued)

Available for logged in users only - when the managing consortium makes changes to an agreement the system will notify you with the orange 'Update' box on the dashboard. Updates can be a document added or removed, a supplier being added or removed or another significant event.



The orange 'Update' box signifies these agreements have an update you have not seen yet

When you click on the orange updates box it will open the agreement and show the updates tab:



Click 'Mark all as read' to clear the orange Update box on the dashboard

Click the 'Acknowledge' button to mark one by one which are read

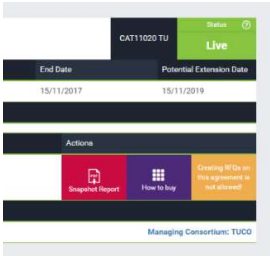
When you have read the updates you can press either the 'Mark all as read' button, or choose to only acknowledge updates one by one with the grey 'Acknowledge' button. The function here is purely for notification purpose, you are not agreeing to anything and the details are not reported on. It simply removes the 'Update' orange box from your dashboard.

RFQ – Request for Quotation

For logged in users that have the privilege granted by their institution administrator you may use the RFQ button on the agreements. Note that not all agreements are eligible for RFQs. Where they are not, the box will show as orange with a reason it cannot be used. Otherwise it will display green.

RFQ Allowed:

RFQ Not Allowed:



To start an RFQ:

- Click on the RFQ button
- Enter a name for your RFQ (the system will automatically add the agreement name, but you can override this)
- Click in the box to enter the date and time you would like to close this RFQ – once saved this cannot be changed
- Enter the description of your RFQ here. Be very clear and specific, you may enter as much text as you wish. You can use the editor toolbars to add bold, underline etc and also spell check if you wish
- You can now choose to add up to 3 documents to the RFQ. This is optional.
- Now in the bottom section you select which supplier contacts you would like to include. As you know it is correct practice to give the opportunity to every supplier you feel is able to fulfil your requirement.
    - Click on the tick box to deselect a supplier, the system will automatically include all contacts on the agreement for you to untick as appropriate
    - You can also add in your own local supplier contacts you may have. Just enter the email address in the box and press 'Add new field for local contact' and this allows you to add as many as you need to
- At this point you can choose to:
    - Save your RFQ but not send it yet
    - Preview before sending – this shows exactly what the suppliers will see and you can amend if you need to
    - Cancel the RFQ – this abandons the RFQ
- In the Preview you can see just what the supplier will see when they receive their email. Click on Back to amend the RFQ or press Send & Seal to send it – you cannot edit anything after this point.
- The emails are sent to the suppliers, and you will see a summary of your RFQ
- You now await responses from the suppliers, which all deliver direct into the system.
- The suppliers can either complete the submission and send, or they can ask for clarification. The clarification function is built into the system. If they use this, you will receive an email from the system asking you to log into your RFQ to view & respond. Your response is sent through the system and will go to all suppliers.
- You can also send further information if you realise you want to include more detail, just go into your RFQ through the Dashboard, My RFQ's tab and press the 'Send Further Information' button at the top.

Once the RFQ period has ended:

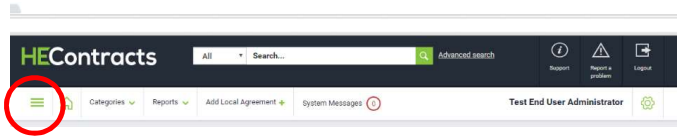
- When the RFQ period has ended you can see your RFQ status will show as 'Finished' in the dashboard 'My RFQs' tab. Click on view
- You can now see all the suppliers that have submitted, and download their documents

User Management (Administrator function)

As a Local Administrator you can create and edit your own institution user accounts. This might be to:

- Add a new user
- Change a user's privileges (using Local Agreements, or RFQ function)

When you log into the system as an End User Administrator you can click on the hamburger menu on the top left of the screen:



Editing a user:

- Click on Users
- This now displays all the users in your institution, click the 'Edit' button on that user's line
- This screen now allows you to amend any of their details. You do not need to change the password; this can be left blank.
- You must ensure all mandatory fields are complete, these are marked with a red asterisk
- You can change any details you wish, and can set the privileges for RFQ (allowed, yes or no) and can also allow them to create Local Agreements by ticking the End-User-Administrator box. You should also leave the End User tick box checked
- Once you have completed your changes, press 'Edit User' to save

Creating a user:

- Click on Users from the hamburger menu as above
- At the top of the tab press 'Add new user'
- Complete all fields and enter the password in both boxes
- Then press 'Edit User'
- Now before you leave this page you can set the privileges, allow RFQ? What level of user you would like them to be, (End User to access the system or End User Administrator to allow them to edit all your users and allowed to create Local Agreements?).
- Press 'Edit User' to save these privilege changes
- Inform the user you have set them up and how they can access the system at www.hecontracts.co.uk

Removing a user:

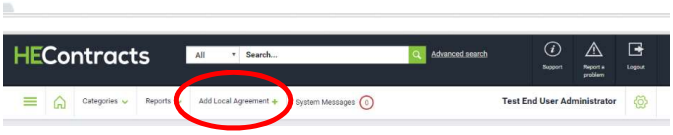
- Click on Users
- This now displays all the users in your institution, click the 'Remove' button on the line you wish to remove

Local Agreements :: Adding Agreements, Lots & Suppliers

Local Agreements are personal to each institution. You can choose if you wish to hold your locally arranged agreements within HE Contracts. Any that you do will only be visible to your institution as well as the consortium you are a member of (they can see these to assist with any administration problems).

When you use Local Agreements, you will see the agreement name is prefixed with 'Local Agreement:' in the listing views.
You can search for these or add them as favourites etc, just like you can with any other agreement in the system.

All Local Agreements are managed from your dashboard. Your consortium will need to turn on the Local Agreement feature for you, and if you do not see 'Add Local Agreement' on the main menu this has not yet been activated for you.



There are two ways to work on agreement, show and edit:

- Show – allows you to work on adding things to an agreement
- Edit – allows you to edit the base content of an agreement

To add a new Local Agreement:

- Click 'Add new Local Agreement' on the top menu bar
- Follow the screen down entering your information
  - Agreement Status:
    - Preparation – Setting up an agreement, not visible to end users
    - Available – Agreement is complete and shows to end users
    - Suspended – The agreement has an issue, text is entered to explain briefly why it is suspended and end users can see a very limited view of the agreement
    - Ended – The agreement end date has passed, and the system automatically changes the status to Ended. It is also no longer visible to end users (but can be found in searches)
  - Agreement Manager – the creator of the agreement can show another contact as the manager – this shows to the end user
  - Draft function – at the bottom of the page you will see Add as Draft – Yes/No. This is a feature to allow you to start an agreement before you have all the mandatory information. As long as you have selected 'Preparation' as the status you can select Yes to draft, and it will allow you to save the page without completing all the mandatory fields.
- Press Save

Now the base agreement is added you can now add items to it; Suppliers & Contacts, Lots or Documents.

To add lots:

- Click on 'Show' on your agreement
- Click on 'Add Lot+'
- Complete the fields on the page. The start & end dates automatically populate but you can edit them if you wish
- You can now select the subscribers just like in the agreement
- Press 'Add Lot+' to save

Local Agreements (continued)

To add suppliers:
If you have lots on your agreement, suppliers are added to the lots individually. If there are no lots the supplier attaches to the main agreement.

- Press 'Show' on the Agreement or Lot you wish to add suppliers to
- Click on 'Add Suppliers+'
- The pop up box allows you to search for existing suppliers on the system, or you can press 'Add New Supplier+' to add a new one
  - Adding New:
    - For UK addresses, start with the postcode, enter it in capitals and press Find Address. For international just start at the top.
    - Press 'Save & Link'
  - Selecting existing suppliers:
    - Click on 'Add Suppliers+' and tick the box next to the supplier name(s) (you can add multiple suppliers), then press 'Add Supplier'
- The screen will refresh, but not yet show your suppliers. In HEC it was requested that all suppliers must have a contact with them. So before the supplier appears you must select or create a contact.
- Click on 'Select Contacts' the screen shows all the suppliers you have selected that have a contact name currently in the system. You can check if this is the correct contact for you, if it is tick the select box(es) and press 'Add Contacts'. If not, close and select 'Create New Contact+'.
- This has the suppliers you have selected in the drop down menu, select the supplier you want to add to and enter the information, then press 'Create Contact+'
- Repeat this for each contact you want to add

To add documents:
Documents are all added directly to the agreement, even if the agreement has lots attached.
To add a document:

- Press 'Show' on the agreement you would like to add documents to
- Click on 'Add Document+'
- Choose your category
- You can add a document or link, and give the item a name
- Choose what type of item you are adding, Link or File
- If you have chosen File, click on browse to add your document
- If you have chosen a Link, enter the link including the http://
- If you wish, you can choose to give the document to auto expire and archive itself. To do this tick the Automatic Expiration box, enter a date to expire after, and enter an archive note.
- Press 'Add Document' to save

Tip: **You can re-arrange how documents show in the main view. Simply click and hold, and then drag the category or document to where you would like it to display. This allows you to keep important, frequently used documents on top.**

Reports

The system has some set reports to give you access to the data, but also a custom report tool so you can be a little more specific about what you want to export and view.

To access the reports, click on Reports on the main menu.
All reports download as a CSV file (this opens into Excel)

Reports available:

Contract Summary Report
Shows all the agreements & lots for all or one consortia

Contract Contact Report
A slightly simplified version of the Contract Summary Report, but with contact details of the Agreement Manager added

Agreement Supplier Report – Short
A quick view of the suppliers available on an agreement by agreement & lot

Agreement Supplier Report – Full
A more in-depth view of the suppliers available on an agreement by agreement & lot, this time with full address and contact details

Traffic Report
This report shows the amount of traffic an agreement has had, and how many views the agreement, lot(s) and suppliers have had

RFQ Activity
This report shows how much activity has taken place on RFQs through the system

Tip: **Be sure to save your exported CSV file as an Excel spreadsheet if you have used formatting or added worksheets as saving as a CSV file will lose all your efforts in formatting or extra worksheet data!**

Support & Feedback

If you need a hand or something is not working correctly, please get in touch!

We have a friendly team on hand to answer your queries and keep HE Contracts running smoothly.

1. **Report a Problem button**
   When logged into HEC and you come across a problem, click the 'report a problem' link and send us a message. This automatically tells us which page you were on when you had the issue

2. **Email us**
   Send an email to support@hecontracts.co.uk

To give your feedback on the system – good & bad – please email support@hecontracts.co.uk

We will compile the requests for any new functions and present them at the next system review meeting.

HEContracts

www.hecontracts.co.uk
support@hecontracts.co.uk