



Sell2Wales Buyer User Guide – Single Procurement Document (SPD)

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Note - This document is intended as practical information and guidance for users of the SPD module within Sell2Wales. It is assumed that users are procurement professionals with the knowledge and authority to carry out the relevant procedures. It is not a substitute for legal or policy advice, which users are advised to seek if they have any queries regarding the processes and procedures described.



Introduction

Best practice guidance on the supplier selection process, can be found in the Welsh Government Supplier Selection Procurement Advice Note:

[Standard Selection Questionnaire](#)

The main features of SPD module.

- It follows an easy-to-use process, allowing you to select questions which you consider proportionate and relevant to your procurement exercise for inclusion in your SPD request.
- It enables you to create a 'self-contained' SPD request, meaning that you can include your selection criteria beside the relevant question within the SPD itself. This means that you no longer need to include your selection criteria in the contract notice and can refer suppliers to the SPD instead.
- It allows suppliers to complete SPD responses electronically and re-use previous SPD responses. Suppliers will then be able to submit this to you using the existing postbox functionality.
- It allows you to request relevant evidence or means of proof electronically.

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Activating your organisations SPD account and User Access Levels

Initial activation of the buying organisations SPD account must be carried out by a Controller / Administrator within the organisation.

Initially, anyone with Controller access levels for your organisation can assign SPD access. Controllers should select the **SPD** link on the Notices panel of the Buyer Control Panel.

The first time the Controller accesses the module this they will be asked to activate their organisation's SPD account, which is done by selecting **Activate**.





The Controller will be taken to the SPD Control Panel, from where they can add other users to the SPD account.

Users can be managed from the **Manage Users** option on the SPD Control Panel.



Buyer Control Panel

Welcome to your Buyer Control Panel **Natasha**. Please *click* a link in one of the appropriate sections to access the area of the site you require.

 NOTICES	 ORGANISATION	 SUPPLIER SEARCH	 HELP & RESOURCES
<ul style="list-style-type: none">Create New NoticeMy Unpublished NoticesBuyer Unpublished NoticesMy Published NoticesBuyer Published NoticesQuick QuotesStage 2 NoticesSPD	<ul style="list-style-type: none">Welsh Government (AA0007) - Change your OrganisationBuyer ProfileUser ListDocument LibraryAgentsReportsContract Register	<ul style="list-style-type: none">Supplier FinderSearch by DetailsSearch by Category	<ul style="list-style-type: none">NPS Contracts, Framework & GuidanceeProcurement ToolsUser GuidesFAQsContact UsSite MailereCertis

The first time the Controller accesses the module this they will be asked to activate their organisation's SPD account, which is done by selecting **Activate**.

The Controller will be taken to the SPD Control Panel, from where they can add other users to the SPD account.

Users can be managed from the Manage Users option on the SPD Control Panel.

Manage Your SPD Profile

Welcome to your Single Procurement Document (SPD) control panel. From here you will be able to create SPD requests, manage your SPD profile and manage users

SPD Profile	User Management	SPD Requests
<ul style="list-style-type: none">Organisation Details	<ul style="list-style-type: none">Manage Users	<ul style="list-style-type: none">View SPD RequestsCreate SPD Requests

To add a user to the SPD Account a Controller selects **Add User**.



Buyer SPD Users

The table below lists the users that have access to this Buyer SPD account. From here you can add new users, edit or delete current users (depending on permissions).

Add User

Show entries Search:

Full Name	Permissions	Actions
-----------	-------------	---------

The Controller will then be presented with a list of all users aligned to their buying organisation on Sell2Wales and can grant each one SPD access by selecting the user's name.

They will then be asked to allocate one of the below SPD access levels to the new user.

- **Administrator**
 - allows a user to create and amend SPD requests and to allocate SPD access to other users.
- **Editor**
 - allows a user to create and amend SPD requests.
- **Viewer**
 - allows a user to view SPD requests.

The Controller should select the relevant access level for that user and then select **Add User**

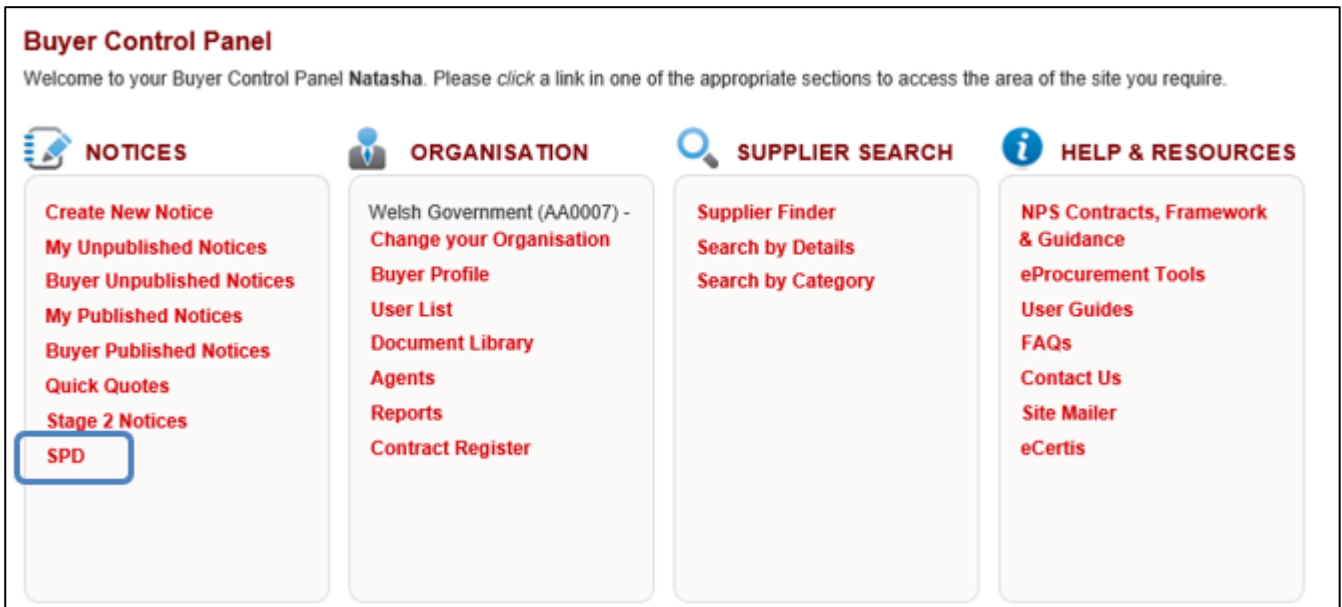
The new user will then see the SPD Module link in their buyer control panel.

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Accessing the SPD module

To access the SPD module, visit the [Buyer Control Panel](#) and select **SPD** under Notices. This will take you to your SPD module, viewable only to Sell2Wales users within your organisation.



The SPD Control Panel will allow you to create / edit your SPD requests and manage user access.

On the control panel you will see the following information:

Manage users

This displays all users who currently can create / edit SPD requests for your organisation. Controllers can add new users through this screen and edit the details of any current users. Users who are not registered on the SPD Module will not be able to see the link to the SPD Module on their Buyer Control Panel.

View requests

This contains a list of all SPD requests that have been created and published through your organisation's profile. The list indicates who created the SPD, and whether each particular SPD has been linked to a Contract Notice, and is locked, or is still being edited.

There is also a shortcut button to create a new SPD request.





Creating an SPD request

N.B. You must ensure the information provided in the SPD matches any information you have provided in the Contract Notice.

Creating a new SPD involves completing 3 main steps, each divided into relevant sections.

Step 1: Procurement details

The details step is broken down in to 3 sections. Clicking **Next** saves the current section and progresses you to the next section.

Authority details

This will be autopopulated based on the Authority you logged-in to.

Publication details

This information does not need to be completed when initially creating your SPD document; it should be filled in once your contract notice has been published on Find a Tender Service (FTS) / Official Journal of the European Union (OJEU). You should receive an email alerting you to this.

Procurement procedure

The Title and Short Description fields need to be completed with the relevant information. A procedure type also needs to be selected from the drop down list. Information on Lots (titles only) should be entered at this stage.



Step 1: Procurement Details Supply of Fruit & Veg

Authority Details | Publication Details | **Procurement Procedure**

Procurement Procedure

Please enter the title and short description of the procurement procedure and, if applicable, insert your internal reference for the procurement exercise within the 'file reference number' field.

* indicates a required field.

Title *

Short Description *

Procedure Type

File Reference Number [?](#)

Number of LOTS

Please provide a brief title for each of your lots

LOT 1

LOT 2

Step 2: Procurement details

Step 2 is broken down into 4 sections, each with its own subsection. Clicking **Next** saves the current section and progresses you to the next question.

Procedure

Common Procurement Vocabulary (CPV) Codes – Use the search bar to find CPV codes that match the Contract you are issuing. You can select multiple CPV codes from the results list, then click **Add** to link them to your document.

Information about Lots – When completing this screen, you must ensure that the information is consistent with any information about lots have provided in the Contract



Notice.

Bidder information

The questions in this section are all selected by default, but you can deselect any questions that you do not wish to include in your SPD request.

Bidding as a group / subcontractor information

The SPD system only allows for one SPD document to be submitted per bidder. If the bidder is required to submit SPD responses on behalf of other organisations - such as sub-contractors, consortia members or organisations on which they will rely to carry out the contract – they are instructed to download the SPD file in Excel format and ask their partner organisations to complete the relevant sections and return it to them offline. The bidder should then attach the SPD responses from their partners as additional documents within their postbox response, which will include their own SPD response in electronic format.

Exclusion criteria

The questions in this section are all selected by default, but you can deselect any questions that you do not wish to include in your SPD request. It is strongly recommended to acquaint yourself with the guidance relating to exclusion criteria available from Crown Commercial Services before completing this section.

[Standard Selection Questionnaire](#)

Create SPD

Step 2: Criteria Selection Supply of Fruit & Veg

ProcedureBidder InformationExclusionSelection

Bidder Information

Bidder Information

Additional information about the bidder.

[2A1] SME

Are you a Small, Medium or Micro Enterprise (SME)?

Selection Criteria

The questions in this section are defaulted to not selected, so you will need to actively select any that you consider relevant to your procurement exercise.

Complete each subsection selecting the questions you wish to include in your SPD request.

Where relevant, you can include selection criteria alongside the questions you have chosen to include in your SPD request, so that any bidders can understand what minimum requirements or criteria required specific to your procurement exercise are.

Step 3: Finish

The **Summary** section provides an overview of all information selected by you in the process of creating your SPD.



Create SPD

Step 3: Finish

Supply of Fruit & Veg

Previous

Save and Exit

Export XML

Export PDF

Export Word

Export E-tender

You can now review the SPD request you have created. If you want to edit your SPD request, clicking on the "Previous" button will take you back through the SPD creation screens.

To save a copy of your SPD request offline, click on one of the export options to download.

Once you have finalised your SPD request, click "Save and Exit" and you will be presented with two options:

"Save Only" will allow you to return to your SPD request and make further changes. You will not be able to link your SPD request to a contract notice.

"Save and Lock" will lock the SPD request, so that no further amendments can be made. Once your SPD request is locked, it will be available to be linked to the associated contract notice.

Summary

Concluding Statements

Authority Details

Official Name: Millstream (robert@millstream.eu)

Country: United Kingdom (GB)

The **Concluding Statements** section highlights the declaration that all suppliers will have to electronically sign upon completing an SPD response.



Create SPD

Step 3: Finish Supply of Fruit & Veg

Previous Save and Exit Export XML Export PDF Export Word Export E-tender

You can now review the SPD request you have created. If you want to edit your SPD request, clicking on the "Previous" button will take you back through the SPD creation screens.

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Summary Concluding Statements

Concluding statements

The undersigned formally declare that the information stated is accurate and correct and that it has been set out in full awareness of the consequences of serious misrepresentation.

At this point you may export your SPD Document to one of Microsoft Word, XML, or PDF formats.

Once you have completed your SPD, you may either save it for editing later, or **Save & Lock** it, which will then allow you to add it to a Contract Notice'

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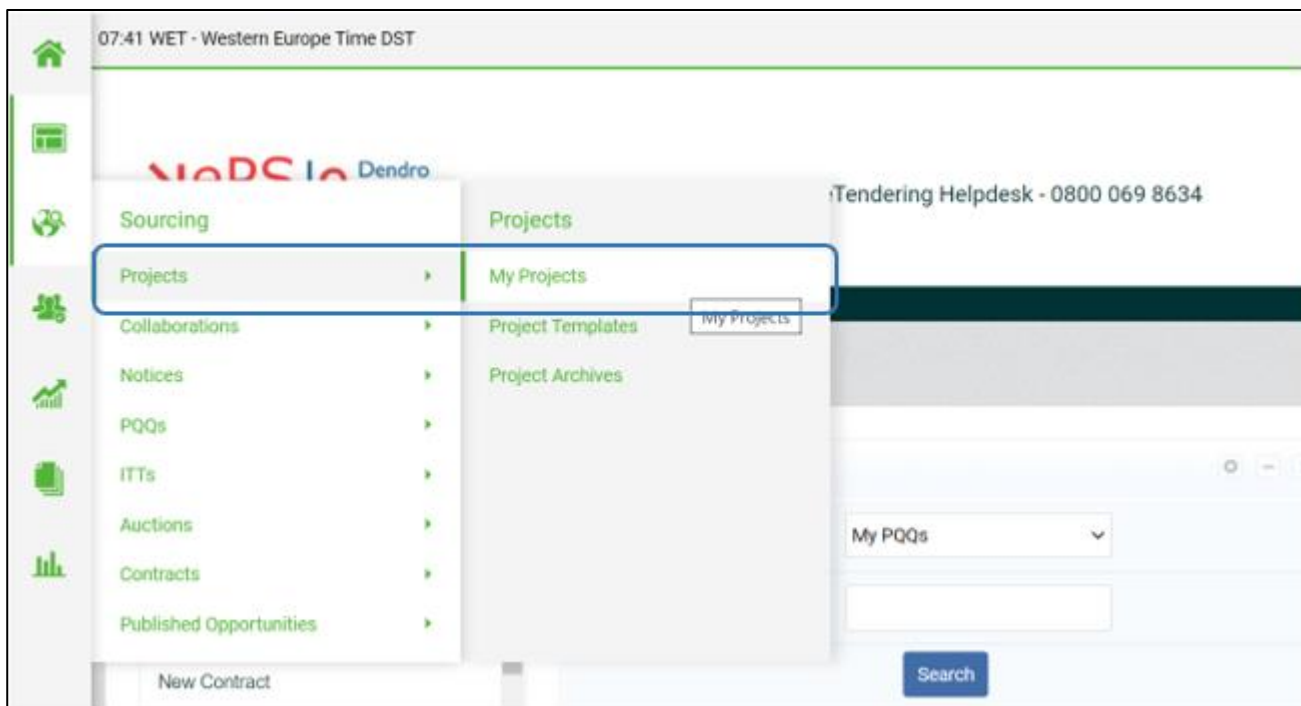
E-Tender Wales SPD export

A user is also able to create an extract that is compatible with e-Tender Wales. The document is generated in Excel format and can be uploaded into e-Tender Wales to generate an appropriate SPD questionnaire.

To generate the extract, please click on **Export E-tender button**, which will produce an Excel document. **Once this has been done, please make sure you have opened the document and saved it on your local drive before you upload it onto e-Tender Wales.**

Please also note, the Excel export will contain both English and Welsh languages and some notes will also be displayed in both languages in e-Tender Wales questionnaire.

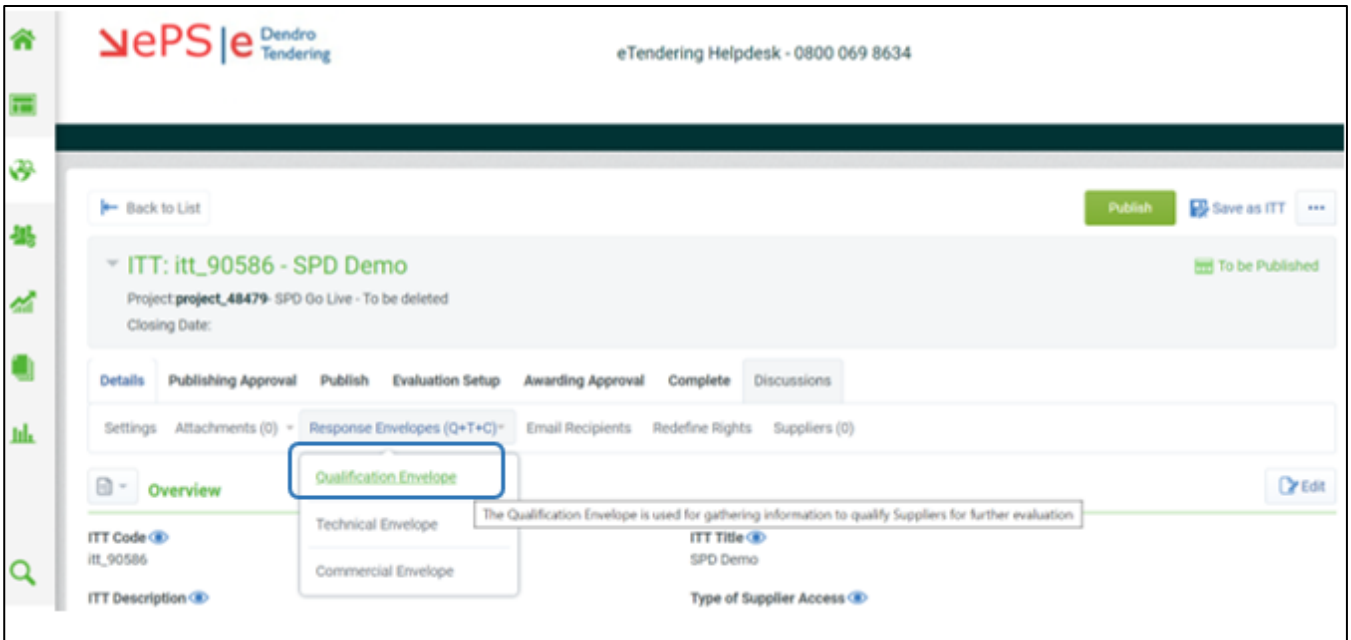
Once the extract has been generated, please go to e-Tender Wales and navigate to **My Projects** section.



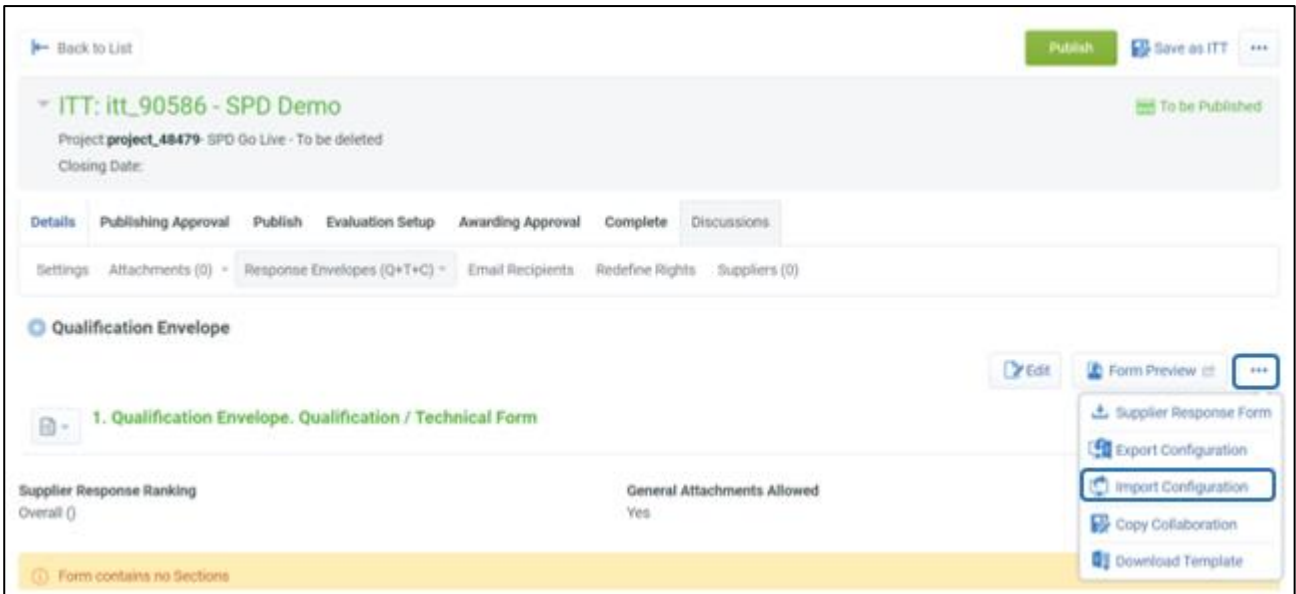
Click on your project from the list and select or create the ITT that your SPD will be used in.

Project Code	Project Title	Project Reference	Owner	Workflow Type	Activation Date
1 project_48479	SPD Go Live - To be deleted		John Mary (CP ICT)	No Workflow	06/10/2021
2 project_34405	Framework Agreement for the Supply of Multi-Functional Devices (MFD) and Associa	NPS - ICT - 0064-16	Robertson Paul (CP ICT)	No Workflow	19/09/2016
3 project_46108	Multi-Functional Devices and Document Solutions Framework Agreement	NPS-ICT-0104-20	Robertson Paul (CP ICT)	No Workflow	11/12/2020

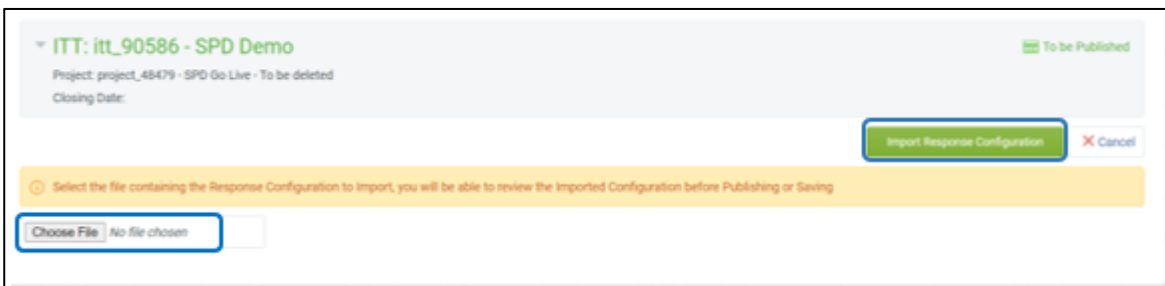
Once in the ITT select **Details > Response envelope > Qualification envelope**



Click “...” in the right-hand corner of the screen and select **Import Configuration**.



Click **Choose File** and select your saved SPD file and click **open**. Once the file has been added, click **Import Response Configuration**.





Adjust the drop-down boxes to select which envelope the SPD will sit within. This is usually the **Qualification Envelope**. Then click **Confirm**.

ITT: itt_90586 - SPD Demo
Project: project_48479 - SPD Go Live - To be deleted
Closing Date:

To be Published

Confirm X Cancel

The file has been analysed, select the sheets to be imported for each of the Response Envelopes

Select Sheets to be Imported

Qualification Envelope
Qualification Configuration Sheet

Commercial Envelope

Technical Envelope

When the below screen is displayed, click **Save Import Configuration**. This will save all the SPD questions to the ITT in the correct format.

ITT: itt_90586 - SPD Demo
Project: project_48479 - SPD Go Live - To be deleted
Closing Date:

To be Published

Save Imported Configuration X Cancel

Qualification Envelope

Sheet Imported	Config-ID
Import Sheet Result	OK
Sections to be imported	134
Fields to be imported	224

You can view what the supplier will see when asked to complete the SPD by selecting **Form Preview**. If you want to add or remove questions, you can also select **Edit** which allows you to fully edit your question set.

Back to List Publish Save as ITT ...

ITT: itt_90586 - SPD Demo
Project: project_48479 - SPD Go Live - To be deleted
Closing Date:

To be Published

Details Publishing Approval Publish Evaluation Setup Awarding Approval Complete Discussions

Settings Attachments (0) Response Envelopes (Q+T+C) Email Recipients Redefine Rights Suppliers (0)

Qualification Envelope

Edit Form Preview ...

1. Qualification Envelope. Qualification / Technical Form

Supplier Response Ranking Overall ()

General Attachments Allowed Yes

Your SPD import is now complete and ready to publish to the supplier.



Linking an SPD request to a Contract Notice

An SPD request can be linked to a Contract Notice during the notice creation stage. When you reach the Additional Options question, the option exists to include an SPD (Which must be linked to an active Postbox). Select the SPD checkbox, and then select **Next** to move screen.

Additional Notice Options
Select any additional options that you would like for this notice.

Go to question: Additional Options

Noted Interest
 Indicate that you are administrating this notice on this website and want interested suppliers to record an interest in your notice to obtain further information.

Other Additional Options
Noted interest must be selected if you wish to use these additional options.

Additional Documents
Attach any other supporting documentation for instant download by bidders.

Questions and Answers
Respond only once to questions, keeping all current and newly interested suppliers up to date in real-time.

Postbox
eTendering - receive and manage tender submissions in a secure environment.

SPD
Use the SPD module integrated within the portal.

Ticking these checkboxes adds the option to link your SPD request to the Notice. You can select from the drop-down list on the **SPD** Question and click **Add**. (Please note that only SPD's that have been Saved & Locked are visible for selection).

If you do not have a pre-prepared SPD, you can choose to create an SPD from here.

SPD
Please select the relevant SPD from the list below and click add to link it to your contract notice.

If your SPD is not showing below, it may be because you have not clicked 'Save and Lock' in the SPD Scotland module

* Required information. Go to question: SPD

* Select your SPD:

Select the relevant SPD Request and click **Add**.

Please select...

Selected SPD: No SPD has been selected

Once added, you can now continue and complete your Contract Notice.



Editing an SPD request

An SPD can be edited up until it has been attached to a Contract Notice. To edit an SPD go to the **View Requests** page through the SPD Control Panel. Click on the Title of the SPD in question, and you will be able to unlock and edit as required.

Once an SPD has been attached to a Contract Notice, it may no longer be edited.

If errors are discovered in an SPD once it has been linked to a Contract Notice, users are required to issue an Amendment notice through the Sell2Wales website. If the SPD has several, or serious errors, it is recommended that you start the procurement exercise again.

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Opening SPD responses

Once the Notice deadline has passed, you will be able to access the SPD responses through the Postbox. A PDF version of the SPD response is automatically generated by the system but clicking on Open SPD will display the full question and answer set and provide you with more options for downloading to various file formats.

Requesting evidence

Suppliers have the option of providing evidence online; if this is done, there will be information in the SPD response linking you to the website where this evidence is held.

If it is not provided in the SPD response, you may request the evidence required through the SPD Response Postbox, by clicking the **Request Evidence** button. Select which Questions require evidence to be provided by selecting the tick boxes next to each relevant question.

Once the questions have been selected, click the **Request Evidence** button again, choose a deadline date from the pop-up calendar box, and an email will then be sent to the Supplier requesting the relevant evidence.

The Supplier will submit the evidence through an online form, and the Buyer will be notified once the evidence has been provided.

Further information

If you have any queries regarding the SPD tool please contact the Sell2Wales helpdesk on **0800 222 9004** or help@sell2wales.gov.wales.

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