Procurement
Local Government Association
of South Australia

VendorPanel
Buyers' User Guide

Contents

1.0   Introduction to VendorPanel

LGA Procurement is a commercial business unit, owned by the Local Government Association of South Australia.

LGA Procurement utilizes an innovative online gateway for accessing a range of LGA Procurement approved suppliers. This portal is powered by VendorPanel.com and offers council users an easier, faster and more targeted way of selecting the best available suppliers with the confidence and security of drawing from the pool of LGA Procurement pre-selected panel suppliers.

Some key features of VendorPanel include:
- The system is automated allowing approved suppliers to receive notification of new requests from council and submit responses via the online portal. Councils can interact with suppliers through the system and all proposals are managed and stored in the system
- There is a standardised response format that allows for easy comparison between suppliers
- A quick PDF summary extracts all details of the requests, responses and evaluation making it easy to demonstrate a sound and responsible competitive s3ourcing process. The system logs the process so it ensures council staff can meet governance and probity requirements

2.0   Getting Started

2.1   Registering on VendorPanel

Your council requires a personal invitation to access VendorPanel and the LGA Procurement panels. If you have not already received this invitation which would have been sent to you by noreply@vendorpanel.com or would like another invitation sent out to you, please contact our office on procurement@lga.sa.gov.au to be set up with an account.

Each council will receive one invitation that will be sent to the nominated key contact, who will then be able to invite colleagues to the system. This person, on accepting the invitation, will become your Council's "Administrator". The Administrator is then able to invite other staff within your Council to become "Buyers". If you require additional "Administrators", you need to contact LGA Procurement who will then be able to assign additional Administrator rights to the correct person(s) within your Council.

The invitation will contain a registration link where you can follow the prompts and complete your profile.

The information provided here can be used in Request for Quotes (RFQs).

Buyers
Buyers are the daily Users of the system and have full access to Supplier Lists and are able to create/post and update Requests to Suppliers for quotation of their services per their organisation's requirement.

Buyers have full management over any Request they create, including the closing date of the request that Suppliers must submit their responses by.

Buyers manage the evaluation of Supplier responses and the finalisation of Requests - deciding to "Select" a successful Supplier response and "Decline" unsuccessful Supplier responses.

## 3.0   The homepage dashboard

Once registered, you can access VendorPanel – when you login, you'll get to the homepage dashboard which has "To Do Tasks" to assist you keeping up to date.

It is recommended that you get a feel for the system by creating a test request under the "My Requests" button on the toolbar. A wizard will walk you through the process of creating a request but if you get stuck on anything, just place your mouse over the question mark in the bubble to get more information. This will give you the opportunity to see the entire process through in a test environment (i.e. the request sent and responses received are dummies).

Note that the website has a fabulous range of FAQs and short videos – accessible from the top toolbar.
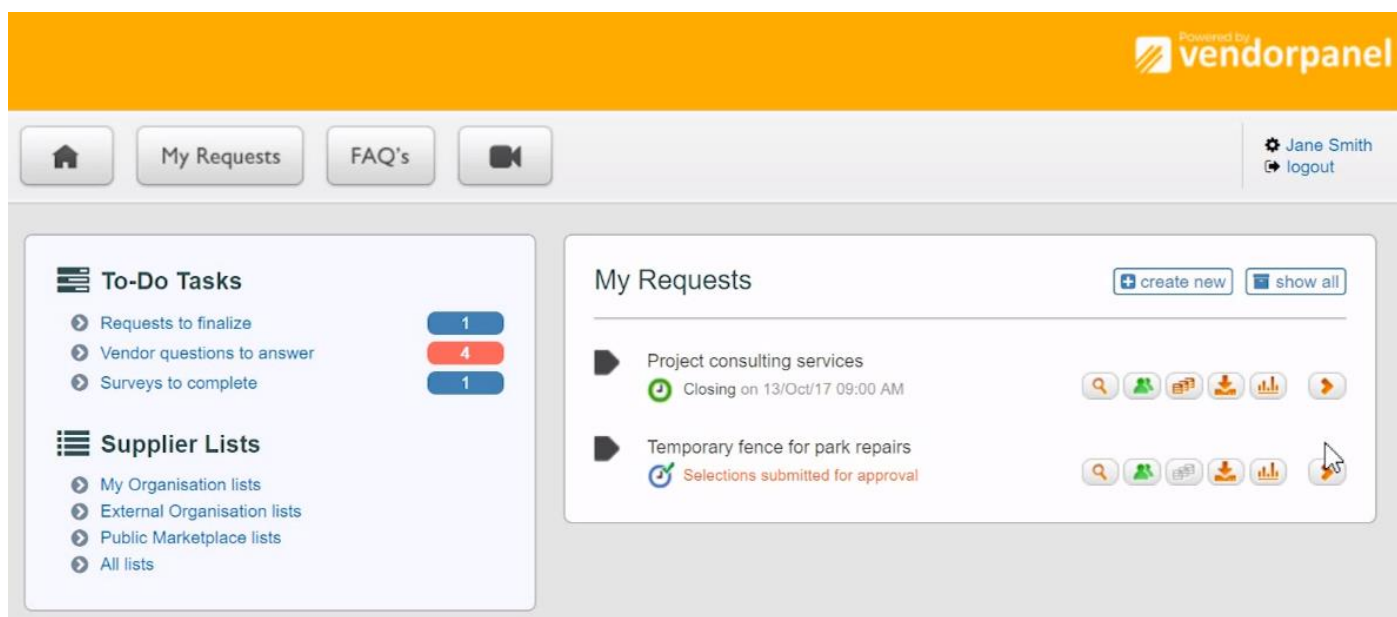
On the left hand side, you will have a Supplier Lists button – where you can access the contact/supplier lists available to you.
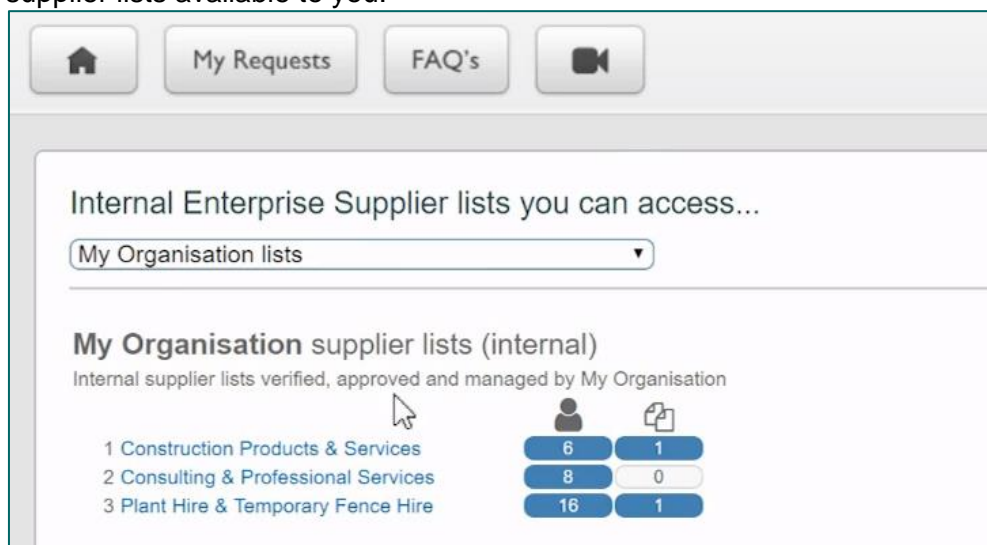
4.0   Completing an RFQ

There are two options for creating a request. One is to follow the wizard, and type in all of your requirements to the Vendor Panel system, following the "wizard". For simple procurement, this may be your preferred option.

To send an RFQ to Supplier(s) you need to complete certain information. To do this, go to the "My Requests" box on the home dashboard, and click on "Create new".
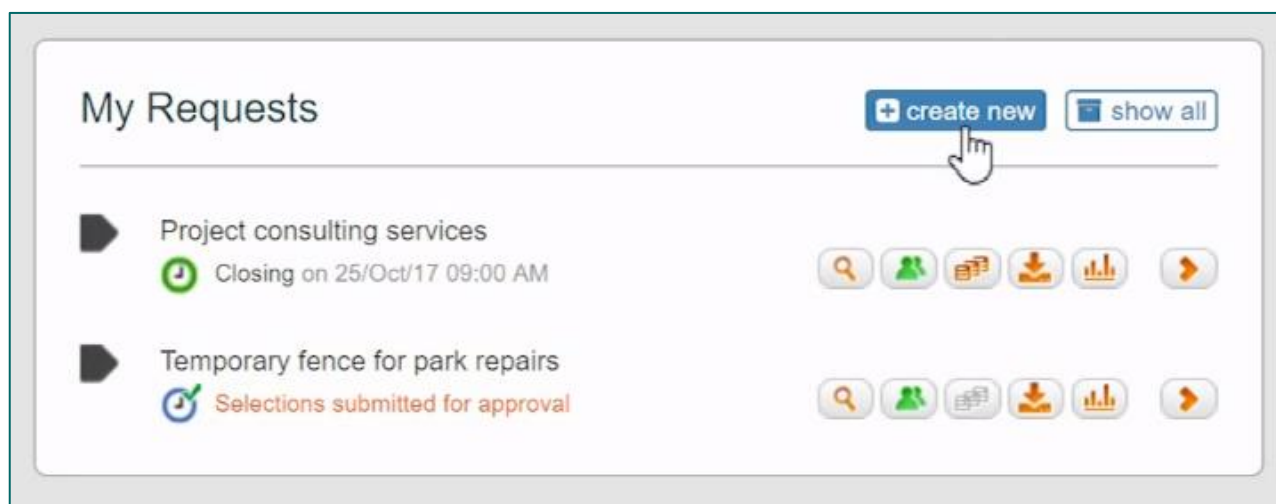
If you have a more complex procurement, or detailed specifications – particularly in the Plant & Equipment; Trucks and Specialised bodies contracts, you will find that there are RFQ templates available for your use.

These templates have been developed to assist in providing consistent requests to Vendors. If you are using a template, you will need to create this *before* you go to VendorPanel – as you will need to attach the document at Step 5.

Current templates can be found on the LGA Procurement website- www.procurement.sa.gov.au. You will need to ensure that you use the correct and current template for each procurement for which you are seeking a quotation.

On the RFQ template, you will have a number of areas where you are asked to provide information. The recommendation to use the RFQ Template document is based on KPI meetings held with heavy vehicle suppliers under contract, where they advised that whilst they prefer Vendor Panel as the means of obtaining and responding to quotes, they also prefer the set-out of the RFQ template which makes it easier for their dealers to respond to.

Once you are ready to go – selecting *create new* will open the *Request Wizard and take you through the seven steps to complete your request:*
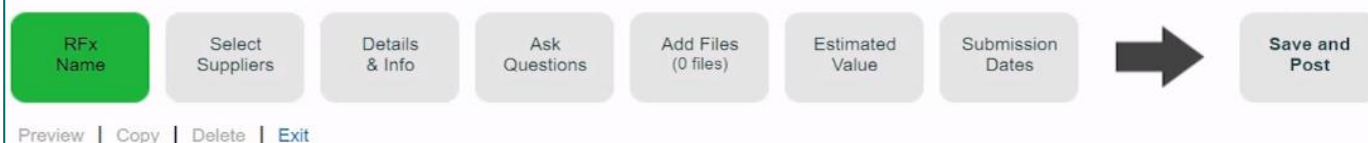
The Wizard will lead you through a 7 steps:

Step One:	The suggestion when completing your requests in Vendor Panel is that in the first box, *"RFx Name"* you advise the type of product you are looking for and your Council specific RFQ number– eg *"RFQ-19-111 - Supply of one only new Backhoe and disposal of one only used Backhoe"*
Step Two:	In the second box *"Select Suppliers",* you can choose either the supplier that your Council has as a preferred Dealership for supply, delivery and ongoing maintenance of the vehicle, plant or equipment or select "All" to obtain a quotation from all suppliers who are able to supply. You are able to select the supplier(s) that you wish to contact to supply you with a quotation. When your request is posted, the panel suppliers that have been selected will receive an automatic email notification and a link to the RFQ. Suppliers will submit responses via the system and you will be notified once it has been submitted.
Step Three:	In the next box *"Details & Info"* you type in what you need or put a simple statement that reads: *"See RFQ and specification attached"*
Step Four	At "*Ask Questions"* you can put in any number of specific questions that you require a response to as part of the process. You can put in your own or simply hover over the "?" and add from the drop down list of suggested questions.
Step Five:	At "*Add Files*", you are given the option to then attach the completed RFQ Template and any specifications, drawings etc which need to include your RFQ number, specification etc.
Step Six:	At *"Estimated Value"* simply indicate the estimated value of your purchase. This is for reporting categories – you have the choice to hide from Vendors – which is recommended.
Step Seven:	At *"Submission Dates"* add your start and finish dates. The responses from Suppliers will for probity purposes, be locked until after the end date and time. You also need to select the anticipated time when you will make a decision as to the successful. This is a guidance to the vendors.
Finally:	You now simply need to check that you have completed everything and click on *"Save and Post".* An automatic email will be forwarded to all of the suppliers that you have indicated to receive the RFQ.

You can save your project to finalise later; copy a request; and even transfer to another user…. If you wish to edit a request (add new suppliers; information; or detail; add documents etc) go to the arrow at the right of "My requests" which will provide you with the action options.

During the open period of the request, you are able to view whether a supplier has reviewed or responded to your request (see below). You can do this by clicking on the graph icon next to the request. Note, if "declined to respond" appears orange – *click on the note* – as you may find that some of the colleagues have declined, but not all (this is particularly valid in plant and equipment; trucks with multiple vendors.

Statistics for this request

Name: Project consulting services
Ref: VP43625

SUPPLIER DETAILS	NOTIFIED	DATE FIRST READ	SUPPLIER RESPONDED
1 : AXIS Axis Consulting	Pending	✅ 12/Oct/17 2:51 PM	✅ Responses received
2 : FIRSTLINE First Line Consulting	✅ Yes	✅ 12/Oct/17 2:48 PM	✅ Responses received
3 : JB Consulting	✅ Yes	Not read	None
4 : Matthews Consulting	Pending	✅ 12/Oct/17 2:20 PM	Responses in draft
5 : White Glove Consulting Pty Ltd	Pending	✅ 12/Oct/17 1:56 PM	❌ Declined to respond

5.0   Evaluating Responses

Once the RFQ has closed, you are now able to evaluate the responses received. A green icon shows that responses have been received – this will enable you to "unlock responses" for evaluation:

Project consulting services
Closed on 12/Oct/17 01:00 PM

🔍	View your request.
👥	View responses received – a green icon indicates that responses have been received.
📄	View documents attached to the request.
⬇	Download a zip folder with the request and all responses received (including attachments).
📊	View statistics for the request – suppliers notified, who has read the request and whether the suppliers have responded.

Note that there are **two evaluation options** within the system – the **Quick Select**, or the **Evaluation Matrix**. Note that you can change the method up until unlocking responses. Once unlocked – no changes are possible.

Quick select provides a short process to select or decline, and to provide some notes…

If you have set up to use the Quick Select – and now wish to use the Evaluation Matrix, click on the "change" method button to set up the weightings.

If you use the Evaluation Matrix, click on "Add New" and follow the prompts to add the criteria and the percentage weighting for each of the criteria you resolve to include in the evaluation.

Once you have achieved 100% for your criteria, then you are ready to start evaluating submissions.

Once the evaluation methodology is finalized, you can view the responses received by clicking on the "magnifying glass" under each response and evaluate manually.

Click on "Evaluate" alongside the first supplier response and score each of the criteria with the slide selector.

Complete all the evaluation criteria for each quotation and then once you have made your final decision, you need to either accept or decline all of the responses.

 You are able to include information in your "accept or decline" email including your Purchase Order number, delivery detail or a reason if you wish on the decline.

Whilst the methodology is locked from change, and scores are already entered, there is the ability to moderate scores, and make notations to supply the decision, or where applicable, changes.

Final steps in your process – enable you to progress through an approval process (which is required to be set up by the Administrator; or to finalise, and then release to advise the Vendors.

6.0 Downloading summary reports

A key benefit of the VendorPanel system is the audit trail, and ease of access to the entire proucrement process records – from your Request for Quote, to the responses received, and your evaluation.

Evaluators are encouraged to document rationale for their selections and/or scoring, as this forms a great basis for debriefing information. If you are declining a Vendor – do them the courtesy of providing some feedback.

By clicking on the download icon associated with the request, you can download a PDF report summarizing your request and the responses received from suppliers. Note that you will receive summary reports with, and without pricing. The details of your request and the responses received can be saved to your internal council records system.
All requests made will also be archived in the VendorPanel system.

You must "finalize" your procurement process, even if you are not advising the successful Vendor through the system. This will keep your system, and the reporting available current and accurate.

Other information is available by using the FAQs dropdown menu or alternatively, click on the Training Tools, Video Tutorials which are short, step by step videos on how to undertake various actions in VendorPanel.

7.0   Contact us

This guide provides council users with the basics of operating the VendorPanel system. Should you encounter any problems with using VendorPanel, please contact either LGA Procurement or Magnetized Markets at the details below:

Operational issues

LGA Procurement Staff
T: 08 8224 2000
E: procurement@lga.sa.gov.au

Technical issues
Magnetized Markets
T: 03 9095 6181
E: support@vendorpanel.zendesk.com