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Introduction

This guide is aimed at buyers who are creating and issuing electronic SPD requests using the online SPD Scotland module within Public Contracts Scotland (PCS). This guide is not applicable to SPDs that have been issued using any other method, such as Word document attachments, or via PCS-Tender.

Best practice guidance on the supplier selection process, including creating SPDs, can be found at the Procurement Journey:

[Procurement Journey – Route 2](#)

[Procurement Journey – Route 3](#)

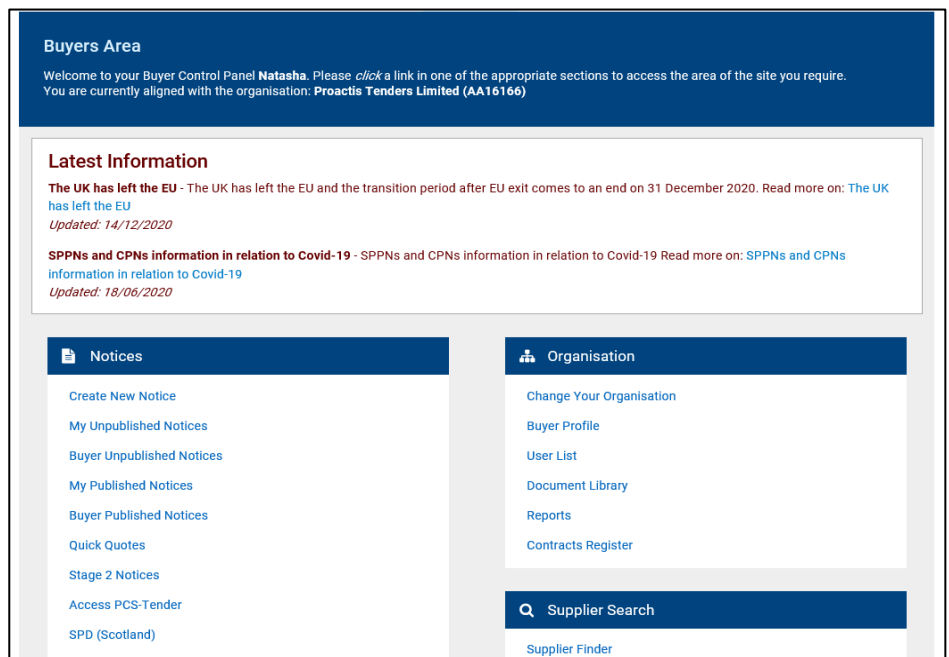
The main features of the SPD module are:

- 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 are able to 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 PCS postbox functionality.
- It allows you to request relevant evidence or means of proof electronically.

Activating your organisation’s SPD account and User Access Levels

Initial activation of the buying organisation’s 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 (Scotland)” link on the Notices panel of the Buyer area.



Buyers Area

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. You are currently aligned with the organisation: **Proactis Tenders Limited (AA16166)**

Latest Information

The UK has left the EU - The UK has left the EU and the transition period after EU exit comes to an end on 31 December 2020. Read more on: [The UK has left the EU](#)
Updated: 14/12/2020

SPPNs and CPNs information in relation to Covid-19 - SPPNs and CPNs information in relation to Covid-19 Read more on: [SPPNs and CPNs information in relation to Covid-19](#)
Updated: 18/06/2020

Notices

- Create New Notice
- My Unpublished Notices
- Buyer Unpublished Notices
- My Published Notices
- Buyer Published Notices
- Quick Quotes
- Stage 2 Notices
- Access PCS-Tender
- SPD (Scotland)

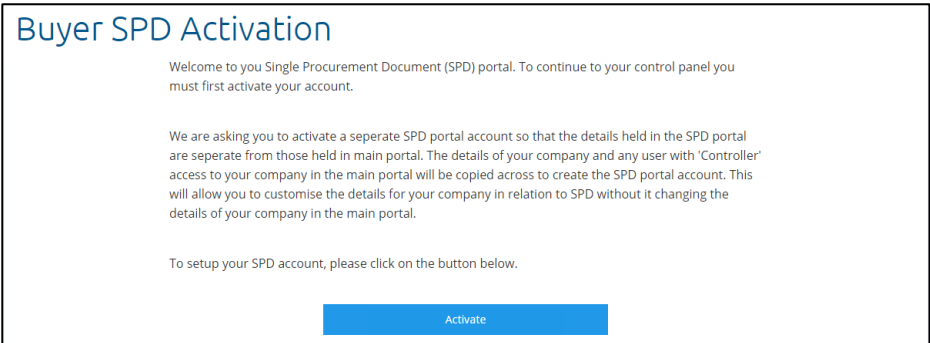
Organisation

- Change Your Organisation
- Buyer Profile
- User List
- Document Library
- Reports
- Contracts Register

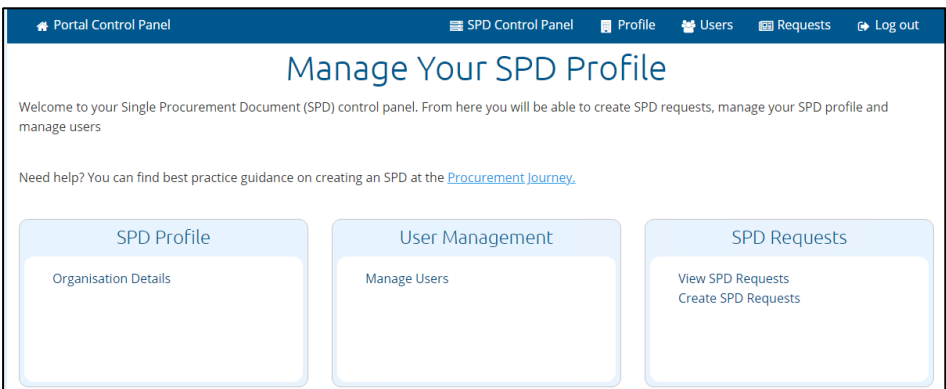
Supplier Search

- Supplier Finder

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

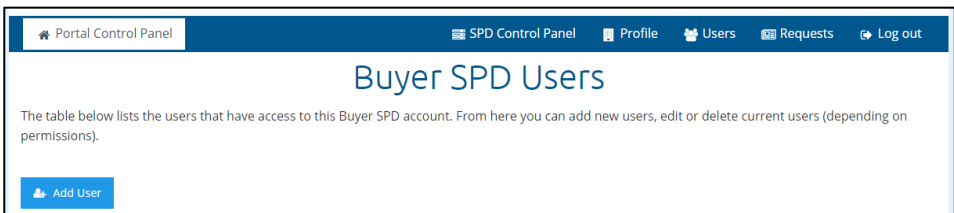


The Controller will be taken to the SPD Control Panel, from where they can add other users to the SPD account.



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

To ~~add a user to the~~ SPD Account a Controller selects “Add User”. The Controller will then be presented with a list of all users aligned to their buying organisation on Public Contracts Scotland and can grant each one SPD access by selecting the user’s name.



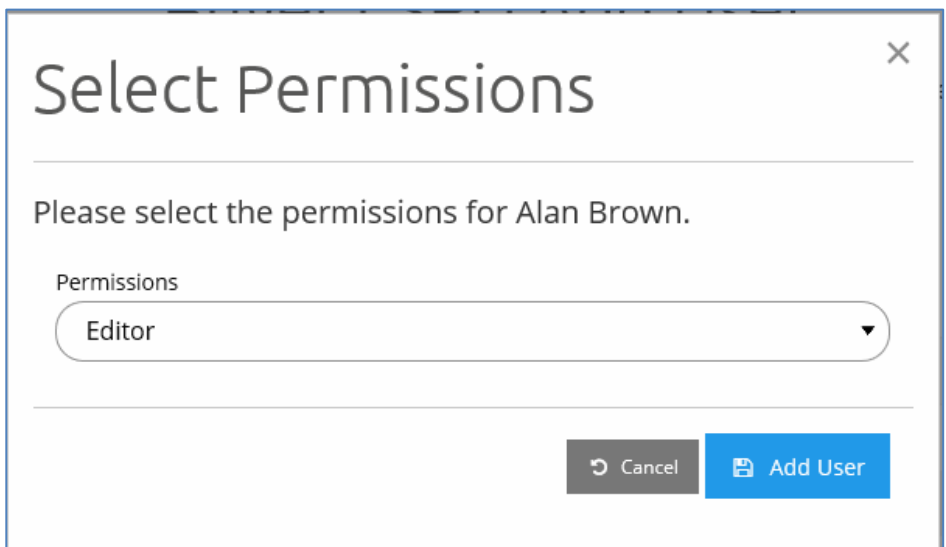
They will then be asked to allocate SPD access levels to the new user. The options available are:

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.

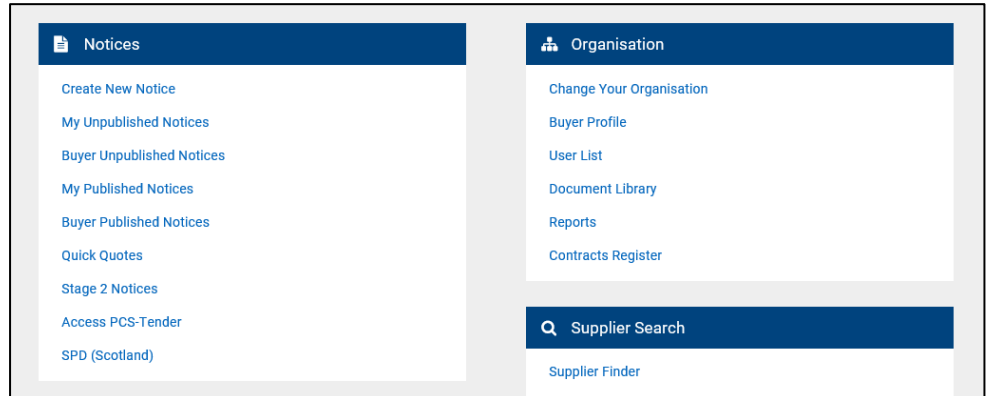
The Controller should select the relevant access level for that user and then select “Add User”.



The new user will then see the “SPD (Scotland)” link in their buyer area.

Accessing the SPD Scotland module

To access the SPD Scotland module, visit the [Buyer Area](#) and select ‘SPD (Scotland)’ under Notices. This will take you to your SPD module, viewable only to PCS 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:

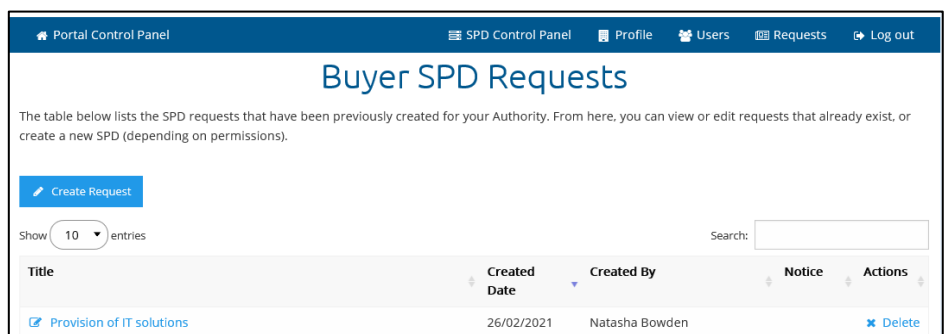
Manage Users

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 Area.

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

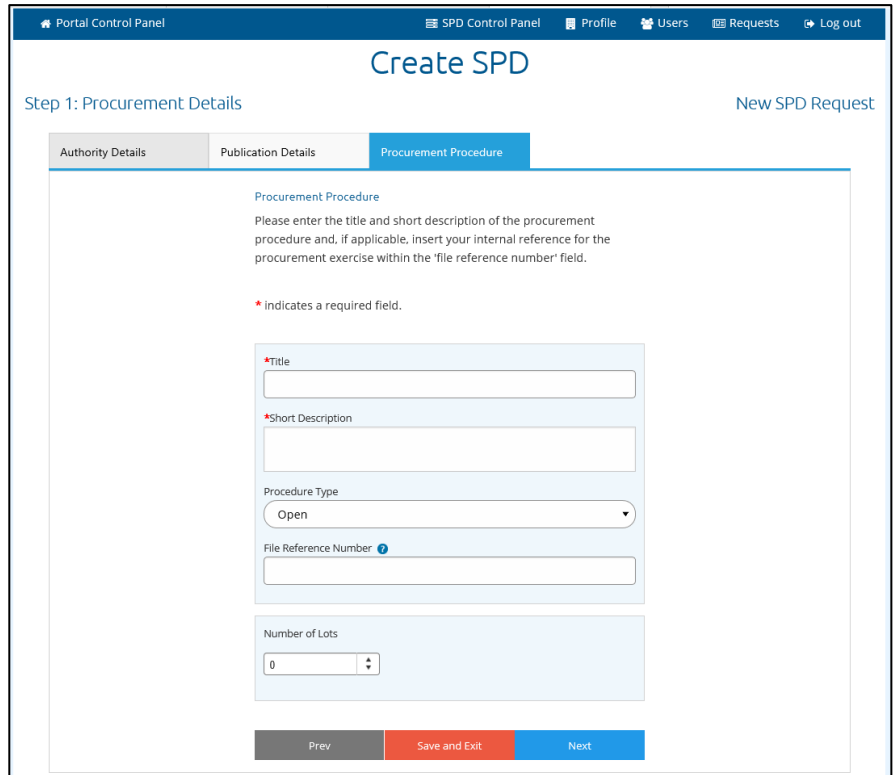
The details step is broken down in to 3 sections. Clicking NEXT saves the current section and progresses you to the next section.

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 FTS/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 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

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

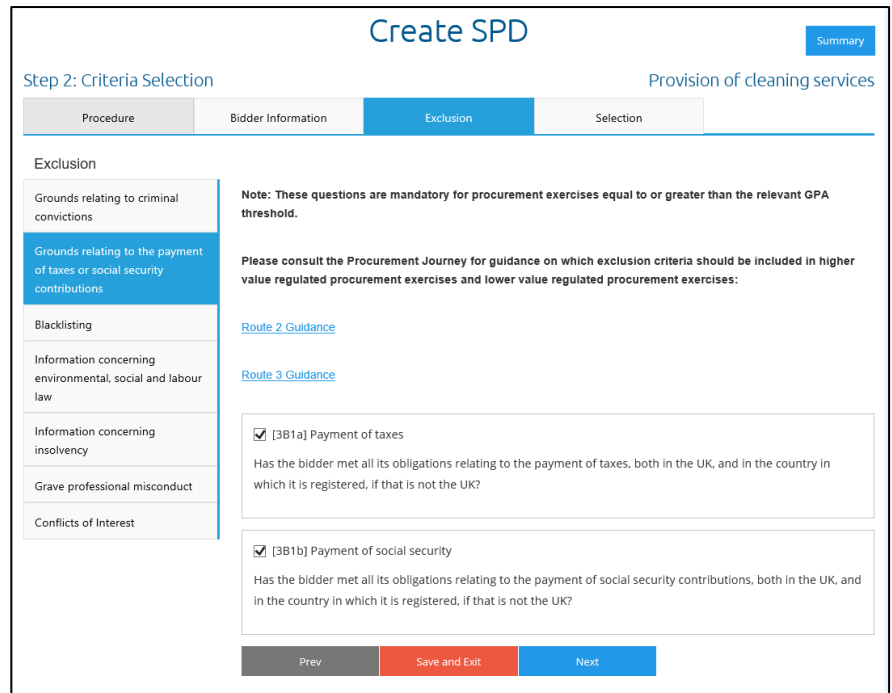
or organisations on which they will rely to carry out the contract – they are instructed to download the SPD file in Excel format and ask their partner organisations to complete the relevant sections and return it to them offline. The bidder should then attach the SPD responses from their partners as 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 at the Procurement Journey website before completing this section.

[Procurement Journey – Route 2](#)

[Procurement Journey – Route 3](#)



Create SPD Summary

Step 2: Criteria Selection Provision of cleaning services

Procedure | Bidder Information | **Exclusion** | Selection

Exclusion

- Grounds relating to criminal convictions
- Grounds relating to the payment of taxes or social security contributions**
- Blacklisting
- Information concerning environmental, social and labour law
- Information concerning insolvency
- Grave professional misconduct
- Conflicts of Interest

Note: These questions are mandatory for procurement exercises equal to or greater than the relevant GPA threshold.

Please consult the Procurement Journey for guidance on which exclusion criteria should be included in higher value regulated procurement exercises and lower value regulated procurement exercises:

[Route 2 Guidance](#)

[Route 3 Guidance](#)

[3B1a] Payment of taxes
Has the bidder met all its obligations relating to the payment of taxes, both in the UK, and in the country in which it is registered, if that is not the UK?

[3B1b] Payment of social security
Has the bidder met all its obligations relating to the payment of social security contributions, both in the UK, and in the country in which it is registered, if that is not the UK?

Prev | **Save and Exit** | Next

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.



Create SPD Summary

Step 2: Criteria Selection Provision of cleaning services

Procedure | Bidder Information | Exclusion | **Selection**

Selection

- Suitability**
- Turnover
- Economic and Financial Standing
- Technical and Professional Ability
- Quality Assurance
- Environmental Management

Please select only those selection questions that are relevant and proportionate to your procurement exercise, adding any minimum requirements or selection criteria where appropriate.

Please consult the [Procurement Journey](#) for further guidance.

[4A1a] Enrolment in a relevant professional register
The bidder is enrolled in the relevant professional or trade registers kept in its country of establishment:

[4A1b] Enrolment in a trade register
The bidder is enrolled in the relevant professional or trade registers kept in its country of establishment:

[4A2a] For service contracts: authorisation of a particular organisation needed
Is it a requirement in the bidder's country of establishment to hold an authorisation of a particular organisation in order to be able to perform the service in question?

[4A2b] For service contracts: membership of particular organisation needed
Is it a requirement in the bidder's country of establishment to hold membership of a particular organisation in order to be able to perform the service in question?

Prev | **Save and Exit** | Next

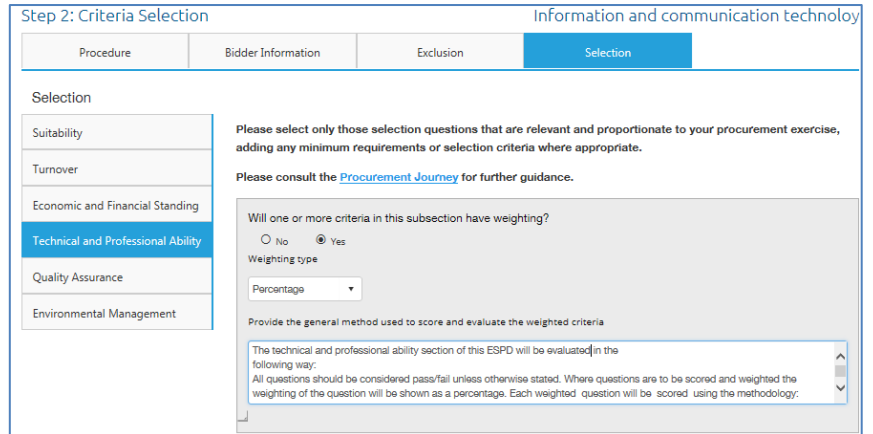
Technical and Professional Ability

This subsection allows you to include scoring and weighting in your SPD request. You must ensure that the weighting attributed to each selected question adds up to the total indicated in the initial weighting question (or up to 100).

Note: You should only include scoring and weighting in your SPD request if you are using a two-stage procurement process, such as the restricted procedure.

You should provide an overall explanation of how you intend to evaluate this section.

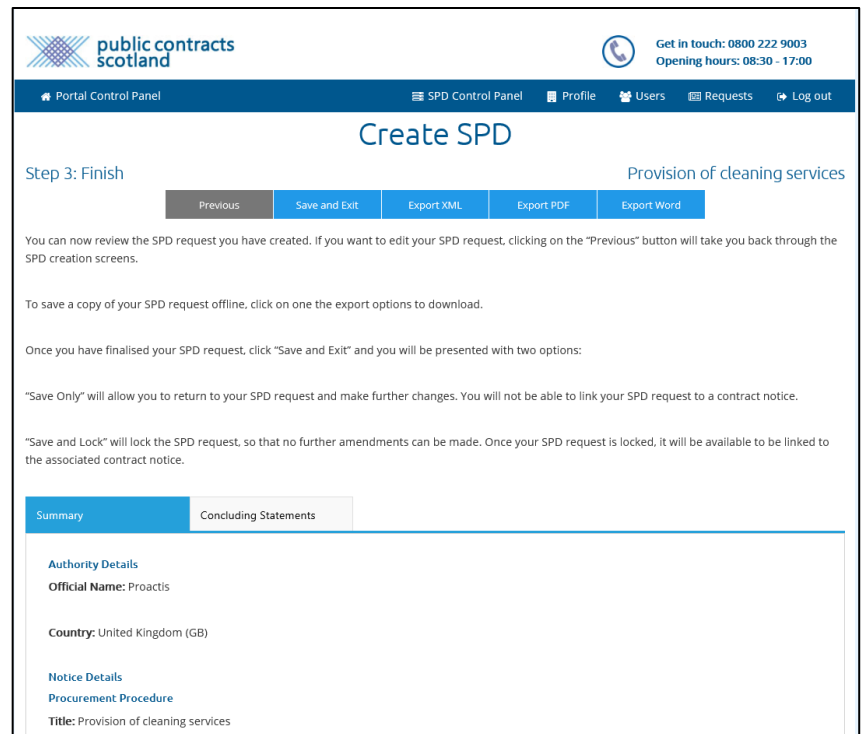
Where you intend to score and weight individual questions, you should also provide the question weighting and an explanation of how you intend to evaluate bidders' responses:



The screenshot shows the 'Step 2: Criteria Selection' form. It has a navigation bar with 'Procedure', 'Bidder Information', 'Exclusion', and 'Selection' (highlighted). Below the navigation bar is a 'Selection' section with a list of criteria: Suitability, Turnover, Economic and Financial Standing, Technical and Professional Ability (highlighted), Quality Assurance, and Environmental Management. To the right of the list, there are instructions: 'Please select only those selection questions that are relevant and proportionate to your procurement exercise, adding any minimum requirements or selection criteria where appropriate.' and 'Please consult the Procurement Journey for further guidance.' Below these instructions is a form with a question: 'Will one or more criteria in this subsection have weighting?' with radio buttons for 'No' and 'Yes' (selected). There is a 'Weighting type' dropdown menu set to 'Percentage'. Below that is a text area for 'Provide the general method used to score and evaluate the weighted criteria'. The text area contains the following text: 'The technical and professional ability section of this ESPD will be evaluated in the following way: All questions should be considered pass/fail unless otherwise stated. Where questions are to be scored and weighted the weighting of the question will be shown as a percentage. Each weighted question will be scored using the methodology.'

Step 3: Finish

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



The screenshot shows the 'Step 3: Finish' form. It has a navigation bar with 'Portal Control Panel', 'SPD Control Panel', 'Profile', 'Users', 'Requests', and 'Log out'. The main heading is 'Create SPD' and the subtitle is 'Provision of cleaning services'. Below the heading is a navigation bar with 'Previous', 'Save and Exit', 'Export XML', 'Export PDF', and 'Export Word'. The main content area contains the following text: '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.' Below the text is a 'Summary' section with a navigation bar for 'Summary' (highlighted) and 'Concluding Statements'. The 'Summary' section contains the following information: 'Authority Details', 'Official Name: Proactis', 'Country: United Kingdom (GB)', 'Notice Details', 'Procurement Procedure', and 'Title: Provision of cleaning services'.

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

At this point you may export your SPD Document to one of *MS 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.

Create SPD

Provision of cleaning services

Step 3: Finish

Previous Save and Exit Export XML Export PDF Export Word

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

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.

The undersigned formally declare to be able, upon request and without delay, to provide the certificates and other forms of documentary evidence referred to, except where the contracting authority or contracting entity has the possibility of obtaining the supporting documentation concerned directly by accessing a national database that is available free of charge.

The undersigned formally consent to the contracting authority, gaining access to documents supporting the information, which has been provided in this Single Procurement Document response for the purposes of this procurement exercise.

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

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

Additional Notice Options

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

Go to question: Additional Options Go

Noted Interest

Indicate that you are administering 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.

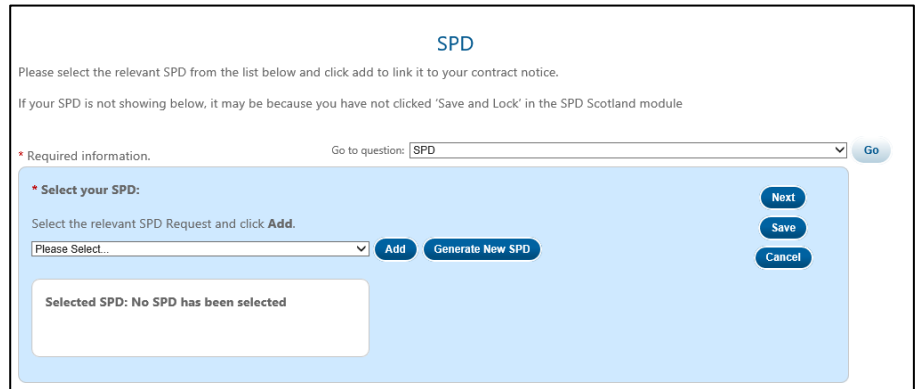
Postbox

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

SPD
Use the SPD module integrated within the portal.

Next Save Cancel

If you do not have a pre-prepared SPD, you can choose to create an SPD from here. Once added, you can now continue and complete your Contract Notice.

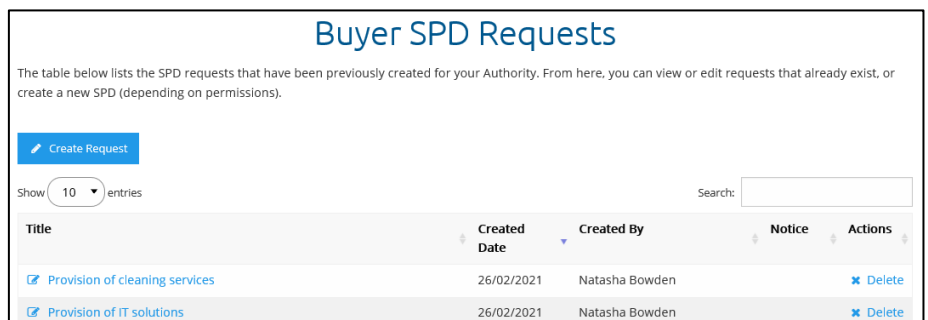


Editing an SPD Request

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 PCS website. If the SPD has several, or serious errors, it is recommended that you to start the procurement exercise again



Title	Created Date	Created By	Notice	Actions
Provision of cleaning services	26/02/2021	Natasha Bowden		Delete
Provision of IT solutions	26/02/2021	Natasha Bowden		Delete

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 proactively including a link to evidence available online within their SPD response; if this is done, there will be information in the SPD response linking you to the website where this evidence is held.

If the evidence is held on the PCS portal, and you are the Postbox opener, clicking on the provided link will either download the document to your computer, or redirect you to the relevant portal.

If you are not the Postbox opener, clicking the link will take you to an access request form. Select “I have a Buyer Log in”, complete all the required fields (see images below), and the system will email the supplier asking them to grant access to the document. Once access has been granted, an email with a direct link to the document will be sent to you.

Once you have access to a document, you may return to view it by following the link contained within the SPD response, or the link provided in the confirmation email.

If you are not a registered user of PCS, you may still request access to documents by selecting “I do not have a Buyer log in”. If the supplier grants you access to the document, you will be emailed a unique log in and password to access the document.

If the supplier has not included a link to evidence documents within their 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.

Changes to SPD

Scottish Government reserve the rights to amend the existing SPD and will make sure you are notified of the changes if your action is required.

If your SPD has been created and attached to the published notice or a notice that will be published shortly by PCS, the changes will not be applied, and you will be able to use the version of an SPD you have requested suppliers to complete when you created the notice.

If your notice has not yet been published and the changes to the SPD have been introduced by Scottish Government, please make sure you update the SPD and attach the most recent version to your notice. Please note, you will be notified by the system when this action is required. This will only happen if the change is significant and will require you to use the most up-to-date version of the SPD questionnaire.

Further information

If you have any queries regarding the SPD tool please contact the Public Contracts Scotland helpdesk on 0800 222 9003 or support@publiccontractsscotland.gov.uk