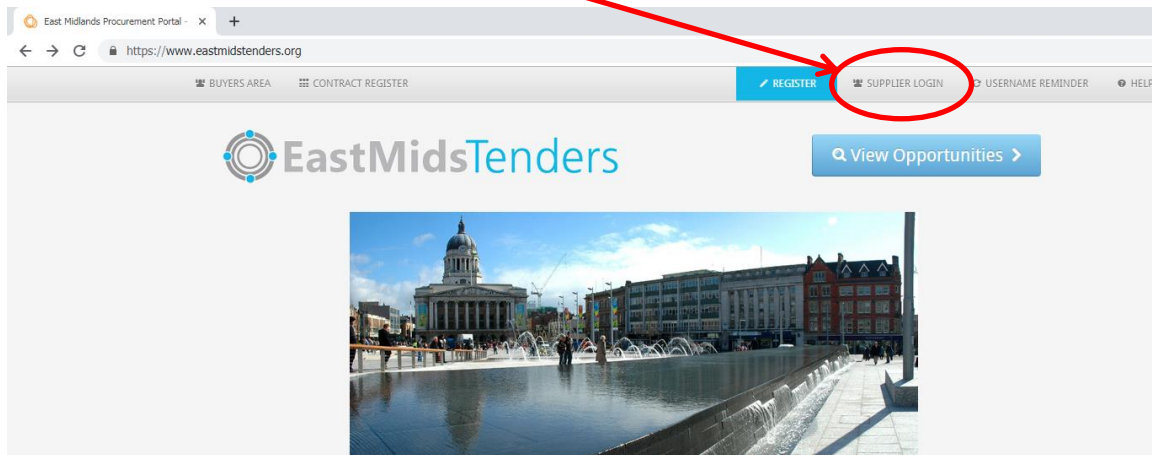


## How to change your team and user setup Adding Workgroups and teams

1. Go to the website <https://www.eastmidstenders.org> and click on the area called Supplier Login shown below.



2. The next page prompts you to enter your username and password. If you can't remember either of them, click on the link entitled Forgotten your username and password. Follow the instructions on screen to get a prompt or reset your details.

**Log In**

**User Name**

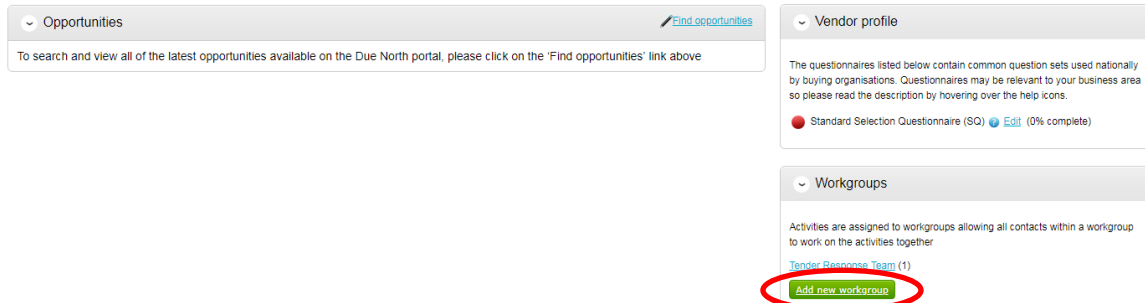
**Password**  
 **Please enter your password**

[Forgotten your username or password?](#)

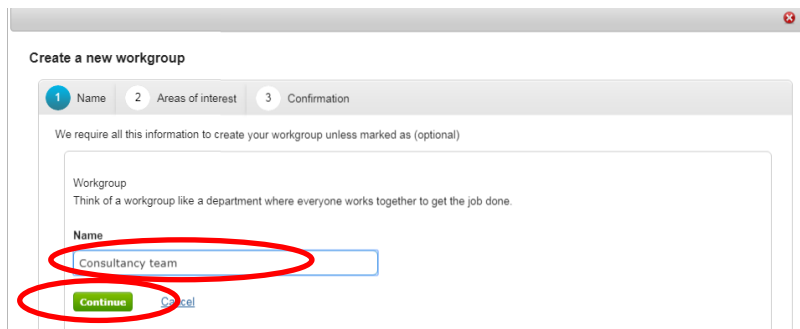
**Continue**

3. In some cases you may want to create additional Workgroups. This will allow specific individuals to receive notifications on specific cases that they specialise in. For example, in a company providing consultancy services, you may have a consultant for the public sector to provide advice on leisure services and one for construction advice.

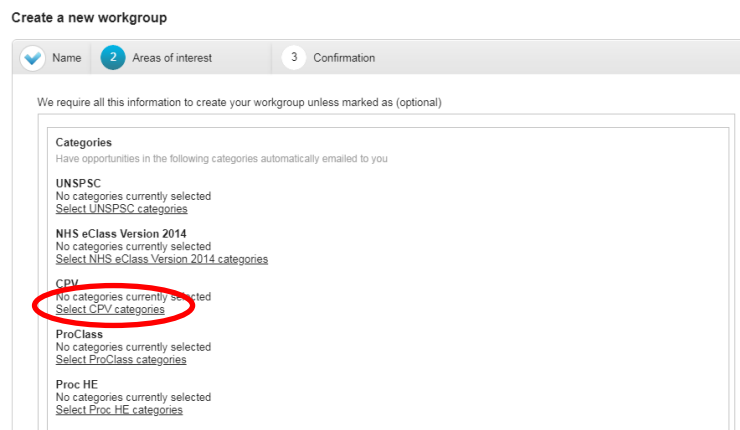
4. Click on the green Add new workgroup button at the bottom of the screen.



5. Give the new Workgroup a name and click on Continue.



6. You can add in areas of interest to mark the sorts of notifications that the new Workgroup wants. Click on Select CPV categories.



7. In the example below, a search was done to find consultancy on buildings. Select as many options as you need to by checking the box to the left of its description as shown below.

The screenshot shows a web interface for selecting CPV categories. At the top, there is a search bar with the text 'consultancy' entered. Below the search bar, there are radio buttons for 'Exact match' (selected) and 'Fuzzy search'. A list of categories is displayed below, with checkboxes next to each. The category '71315200-1 - Building consultancy services' is checked. At the bottom, there is a 'Selected categories' section showing the selected category. Red circles highlight the search bar, the search button, the selected category in the list, and the selected category in the 'Selected categories' section.

CPV category selection

Search categories

consultancy Search Exact match Fuzzy search

Categories list

- 71315000-9 - Building services
- 71315100 - Building-fabric consultancy services
- 71315200-1 - Building consultancy services
- 71315210-4 - Building services consultancy services
- 71316000-6 - Telecommunication consultancy services
- 71317000-3 - Hazard protection and control consultancy services
- 71317100-4 - Fire and explosion protection and control consultancy services
- 71317210-8 - Health and safety consultancy services
- 71320000-7 - Engineering design services
- 71321000-4 - Engineering design services for mechanical and electrical installations for buildings

Selected categories

71315200-1 - Building consultancy services

Select categories Remove all Cancel

8. Sometimes you may struggle to find exact descriptions over what you need. If this happens, change your search to something more general, and try using a Fuzzy search instead of an Exact match search. Remove any unwanted areas by clicking on the red cross.
9. Repeat this process to populate UNSPSC categories (This works like a parent category so you may choose in this example to receive notifications on things like Building and Facility Construction and Maintenance Services, NHS (if applicable), ProClass and Proc HE where required).
10. Select regions of interest if different. If you wish to changes this, click on Edit link.

The screenshot shows a 'Regions of interest' section. It contains a text box with the text 'Leicestershire CC and Rutland'. To the right of the text box is an 'Edit' link with a pencil icon. A red circle highlights the 'Edit' link.

Regions of interest

Leicestershire CC and Rutland

Edit

11. Click on the red cross against any areas you do not want notifications from. The below example is set up to receive notifications from all over the UK.

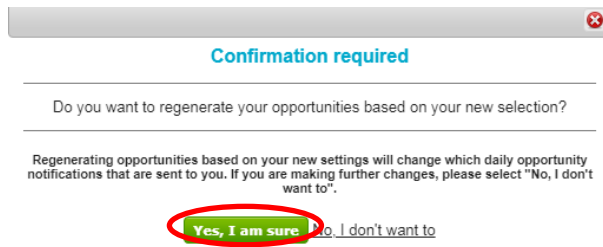
The screenshot shows a 'Region selection' window with a search bar containing 'Enter the search criteria...' and a green 'Search' button. Below the search bar are radio buttons for 'Exact match' (selected) and 'Fuzzy search'. A 'Regions list' section contains a scrollable list of regions, all of which have a checked checkbox: UK - UNITED KINGDOM, UKC - NORTH EAST (ENGLAND), UKD - NORTH WEST (ENGLAND), UKE - YORKSHIRE AND THE HUMBER, UKF - EAST MIDLANDS (ENGLAND), UKG - WEST MIDLANDS (ENGLAND), UKH - EAST OF ENGLAND, UKI - LONDON, and UKJ - SOUTH EAST (ENGLAND). At the bottom, a 'Selected regions' section shows 'UK - UNITED KINGDOM' with a red 'X' icon to its right, which is circled in red.

12. To receive notifications from a specific area, enter a description in the Search regions box then click on Search.

The screenshot shows the 'Region selection' window with 'Rutland' entered in the search bar. The green 'Search' button is circled in red. Below the search bar is a 'Search regions' button. The 'Regions list' section shows a filtered list of regions: UK - UNITED KINGDOM, UKF - EAST MIDLANDS (ENGLAND), UKF2 - Leicestershire, Rutland and Northamptonshire, and UKF22 - Leicestershire CC and Rutland. The 'Selected regions' section is empty.

13. In this example, if Rutland is selected it will filter out the rest of the UK. This will filter out any unwanted notifications. Click on Select Regions once completed, and confirm your change request.

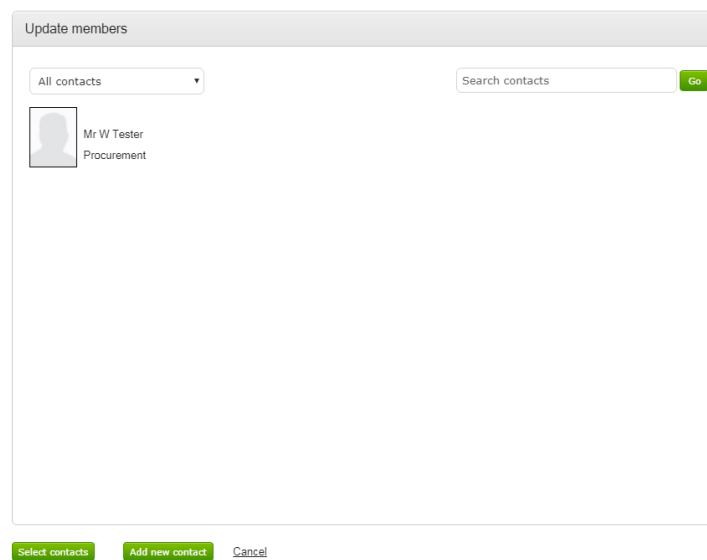
The screenshot shows the 'Region selection' window with 'Rutland' in the search bar. The 'Regions list' section shows the filtered list with 'UKF22 - Leicestershire CC and Rutland' selected, indicated by a checked checkbox and a red circle. The 'Selected regions' section shows 'UKF22 - Leicestershire CC and Rutland' with a red 'X' icon to its right. At the bottom, the 'Select regions' button is circled in red, along with 'remove all' and 'Cancel' buttons.



14. To add in a team member to a new Workgroup, click on the Edit button in Workgroup members.



15. If the user already exists, simply select them by clicking on their name and then on the Select contacts button.



16. To create a new person, click on Add new contact. Enter their personal details.

Create a new user

1 Contact details 2 Address 3 Workgroups 4 Confirmation

Title

First name

Last name

Job title

Telephone

Fax (optional)

Mobile (optional)

Email address

Your email address is only used to send you opportunities you may be interested in.

Confirm email address

Username

[Continue](#) [Cancel](#)

17. Click on the green Continue button when you have what you need and on Create workgroup when you are happy with everything you have.

Workgroup name

Workgroup name: Consultancy team

Categories of interest

Categories of interest: 71315200-1 - Building consultancy services  
72000000 - Building and Facility Construction and Maintenance Services

Regions of interest

Regions of interest: Leicestershire CC and Rutland

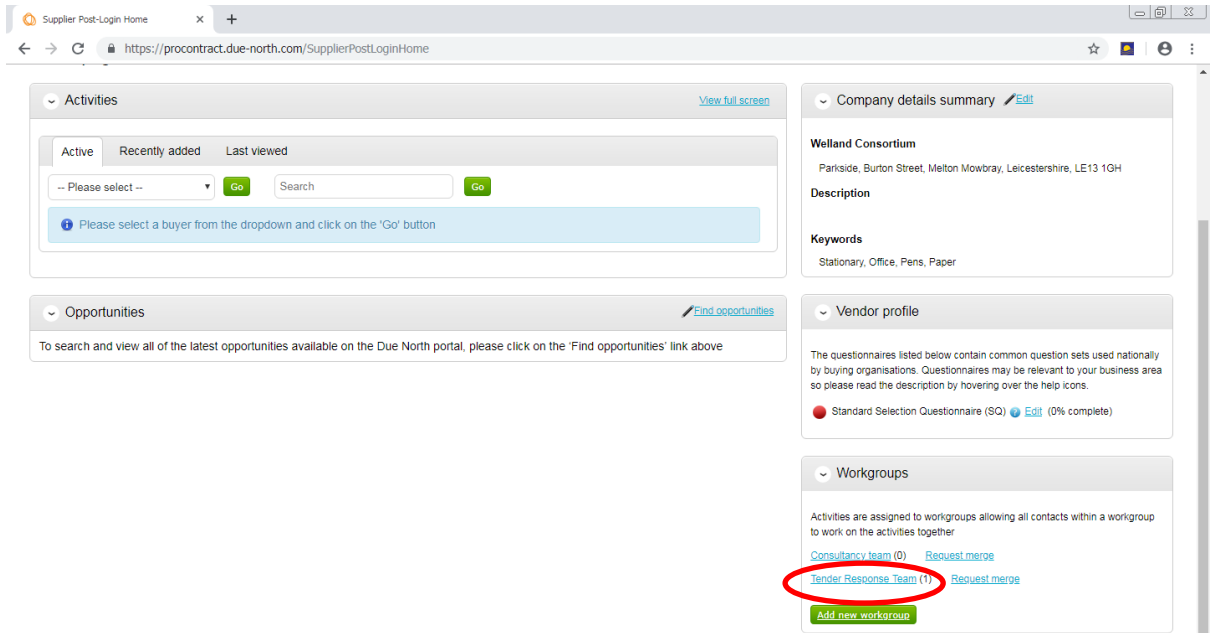
Public lists

Public lists:

[Create workgroup](#) [Cancel](#)


## Removing users.

1. If the user has left the organisation **and the Workgroup is no longer needed**, enter the Workgroup by clicking on its name.



The screenshot shows the 'Supplier Post-Login Home' interface. The 'Workgroups' section is highlighted with a red circle. It lists two workgroups: 'Consultancy team (0)' and 'Tender Response Team (1)'. The 'Tender Response Team (1)' link is circled in red, along with the 'Request merge' link next to it. Below the list is an 'Add new workgroup' button.

2. Click on the option to Disable Workgroup and confirm your requirement. This will stop notifications going to the wrong person.



The screenshot shows the 'Workgroup: Tender Response Team' details page. The 'Disable workgroup' link is circled in red. The page also includes an 'Audit history' section with a 'View audit history' link.

3. If a person no longer works for your organisation but has been replaced by someone and still need the Workgroup, enter the Workgroup, but this time scroll down to the Workgroup members section and click on Edit.

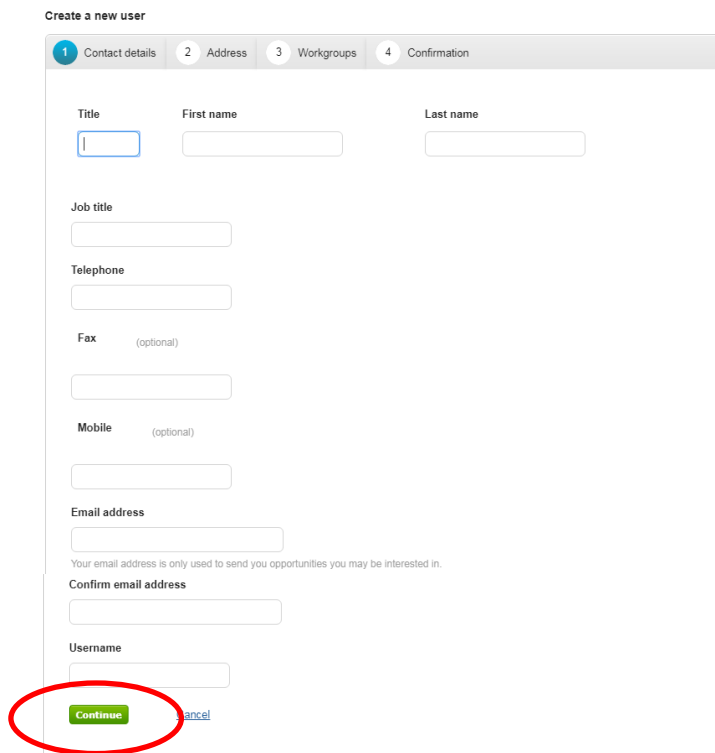


The screenshot shows the 'Workgroup members' section. The 'Edit' link is circled in red. A member is listed: 'Mr W Tester' in the 'Procurement' department.

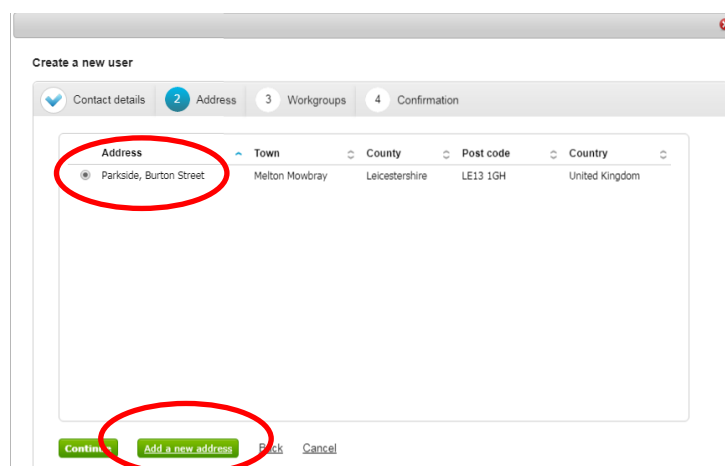
4. Deselect them as a Workgroup member by clicking on their name.



5. Create the new user by clicking on Add new contact.



6. Click on Continue once the personal details have been fully completed. Now confirm the organisation address if it is the same as the default (click on Continue without changes if that is the case) or create a new one if they based in another location by clicking on Add a new address.





7. Configure their access rights and Continue.

**Create a new user**

Contact details Address **3 Workgroups** 4 Confirmation

**Workgroups**  
Select all applicable workgroups for this user.

- Tender Response Team
- Consultancy team

**Access rights (optional)**  
Select the access rights for this user.

- Contract account manager
- Workgroup Administrator
- Company Administrator

**Continue** Back Cancel

8. Confirm the user set up by clicking on Create user.