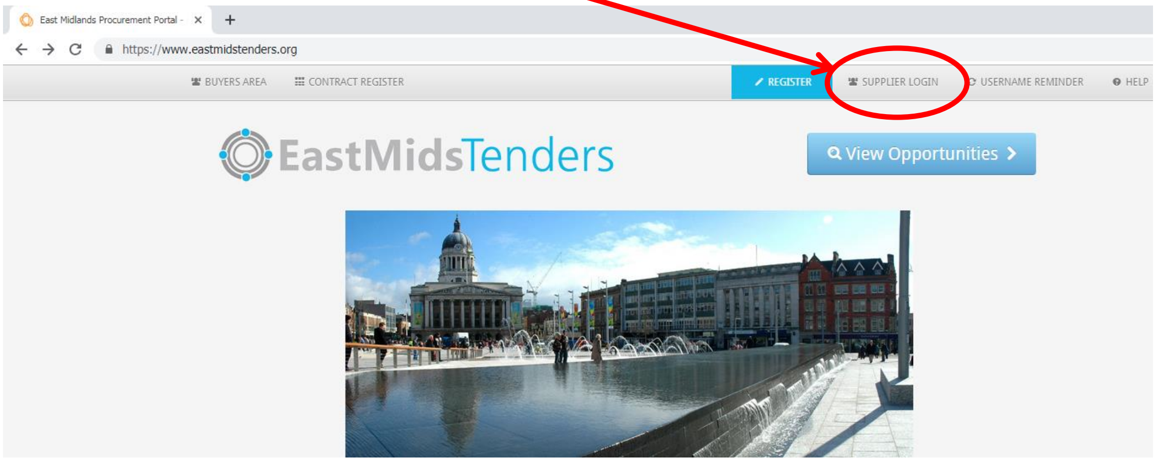
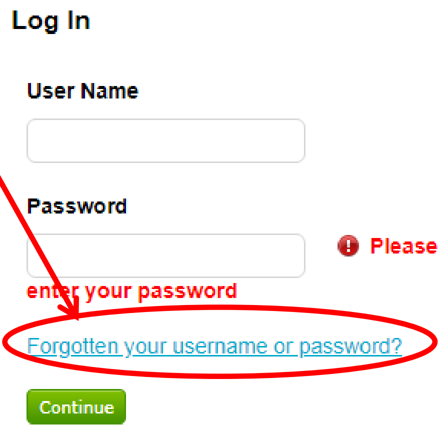
<u>How to change your team and user setup</u>
Adding Workgroups and teams

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

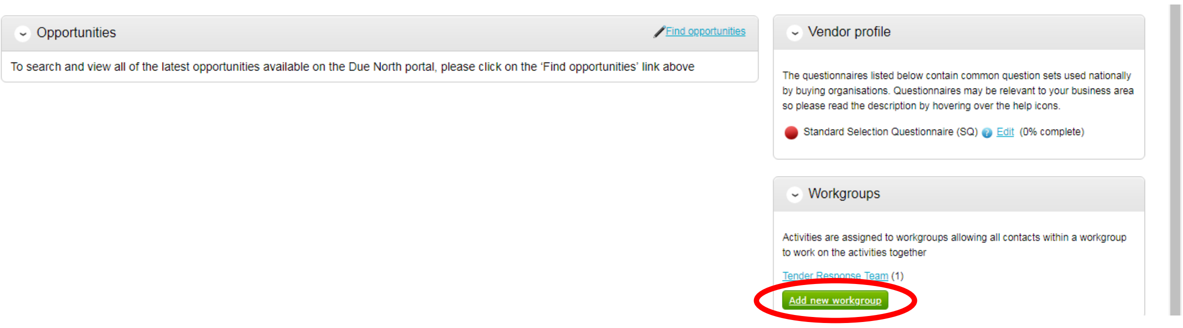


2. The next page prompts you to enter your username and password. If you can't remember either of them, click on the link entitled Forgotten your username and password. Follow the instructions on screen to get a prompt or reset your details.

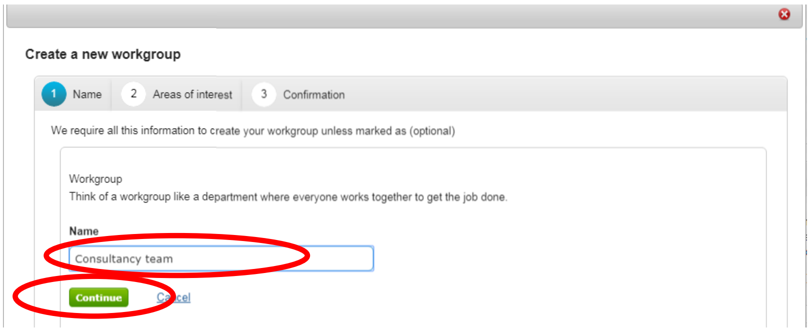


3. In some cases you may want to create additional Workgroups. This will allow specific individuals to receive notifications on specific cases that they specialise in. For example, in a company providing consultancy services, you may have a consultant for the public sector to provide advice on leisure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

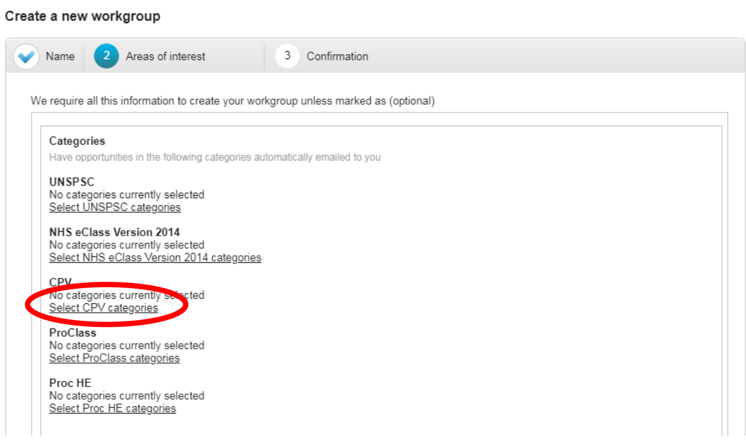
4. Click on the green Add new workgroup button at the bottom of the screen.



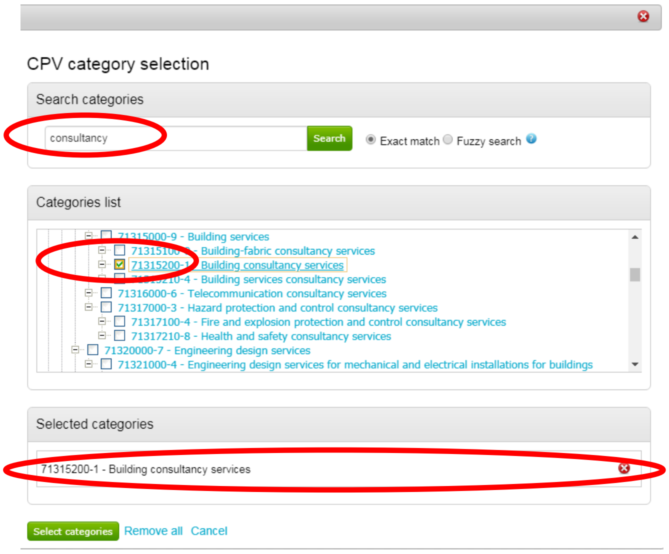
5. Give the new Workgroup a name and click on Continue.



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



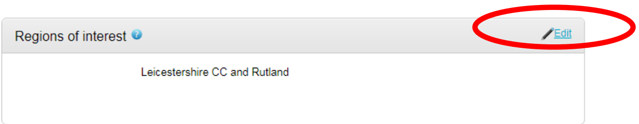
7. In the example below, a search was done to find consultancy on buildings. Select as many options as you need to by checking the box to the left of its description as shown below.



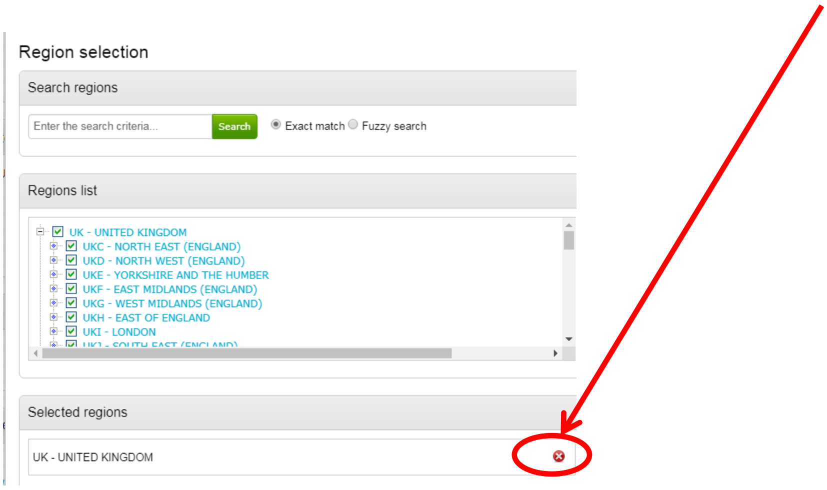
8. Sometimes you may struggle to find exact descriptions over what you need. If this happens, change your search to something more general, and try using a Fuzzy search instead of an Exact match search. Remove any unwanted areas by clicking on the red cross.

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.

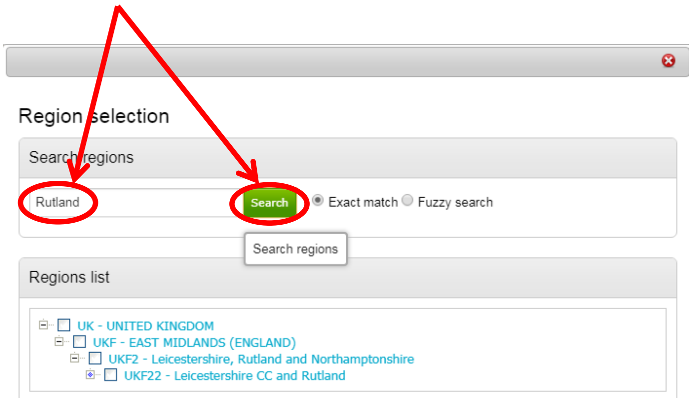
10. Select regions of interest if different. If you wish to changes this, click on Edit link.



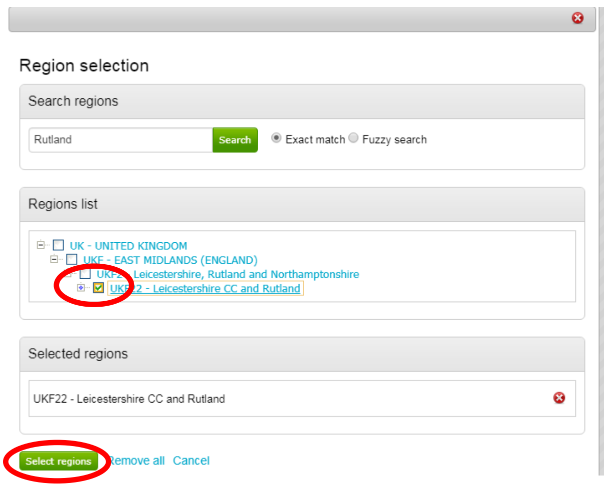
11. Click on the red cross against any areas you do not want notifications from. The below example is set up to receive notifications from all over the UK.

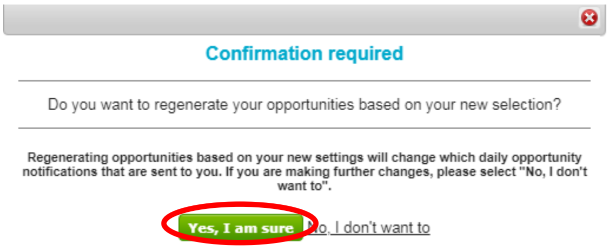


12. To receive notifications from a specific area, enter a description in the Search regions box then click on Search.

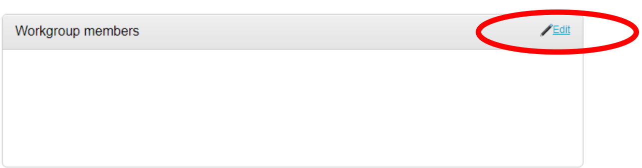


13. In this example, if Rutland is selected it will filter out the rest of the UK. This will filter out any unwanted notifications. Click on Select Regions once completed, and confirm your change request.

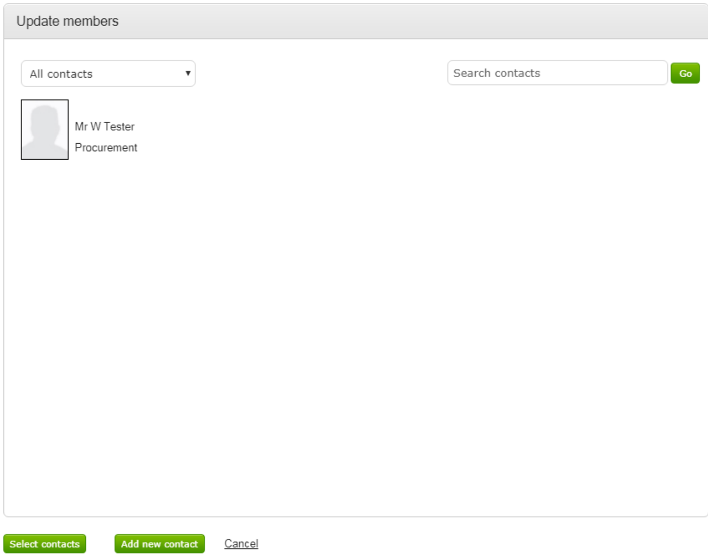




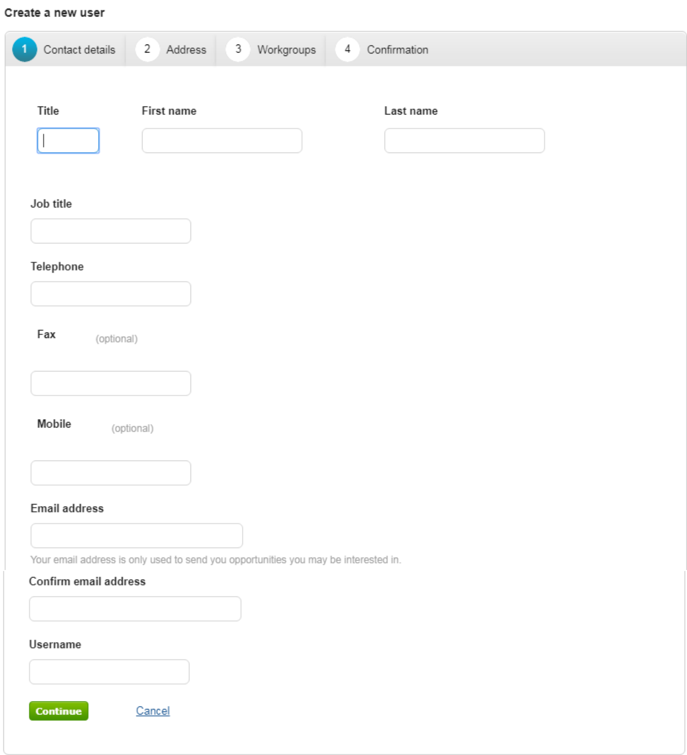
14. To add in a team member to a new Workgroup, click on the Edit button in Workgroup members.



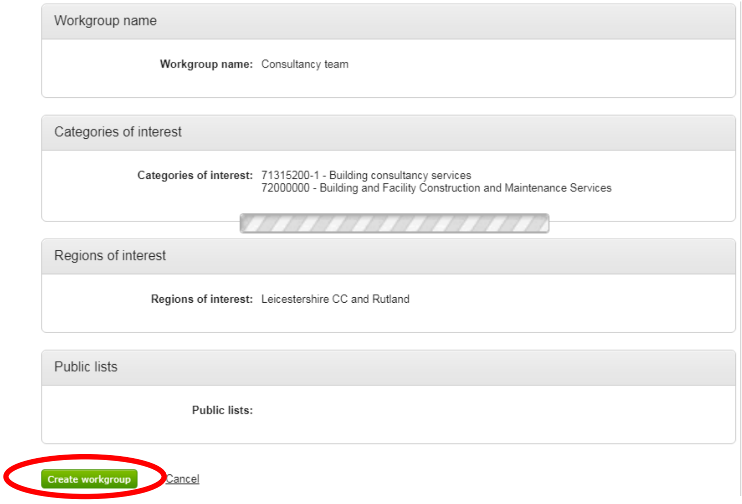
15. If the user already exists, simply select them by clicking on their name and then on the Select contacts button.



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

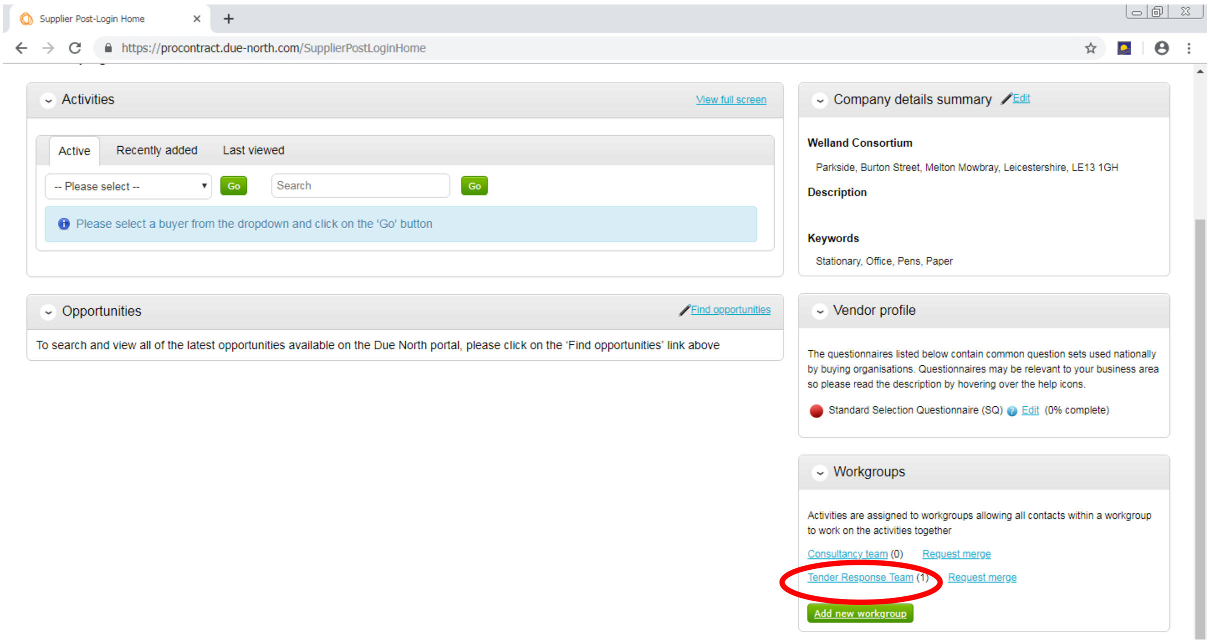


17. Click on the green Continue button when you have what you need and on Create workgroup when you are happy with everything you have.

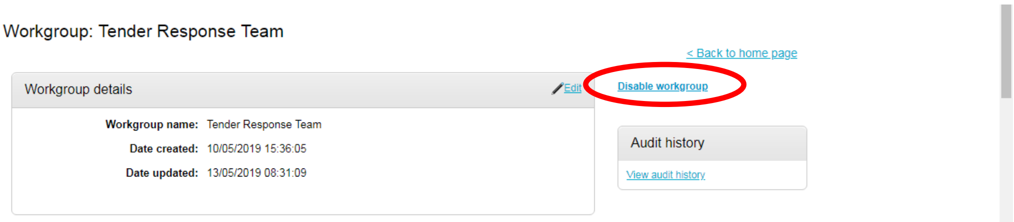


Removing users.

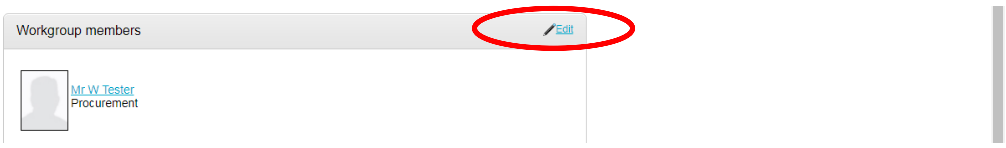
1. If the user has left the organisation **and the Workgroup is no longer needed**, enter the Workgroup by clicking on its name.



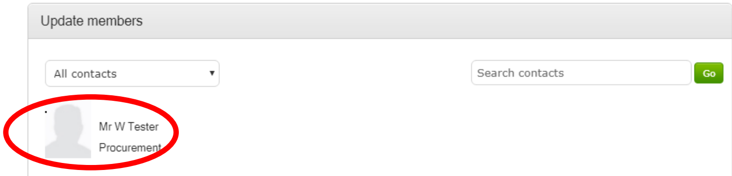
2. Click on the option to Disable Workgroup and confirm your requirement. This will stop notifications going to the wrong person.



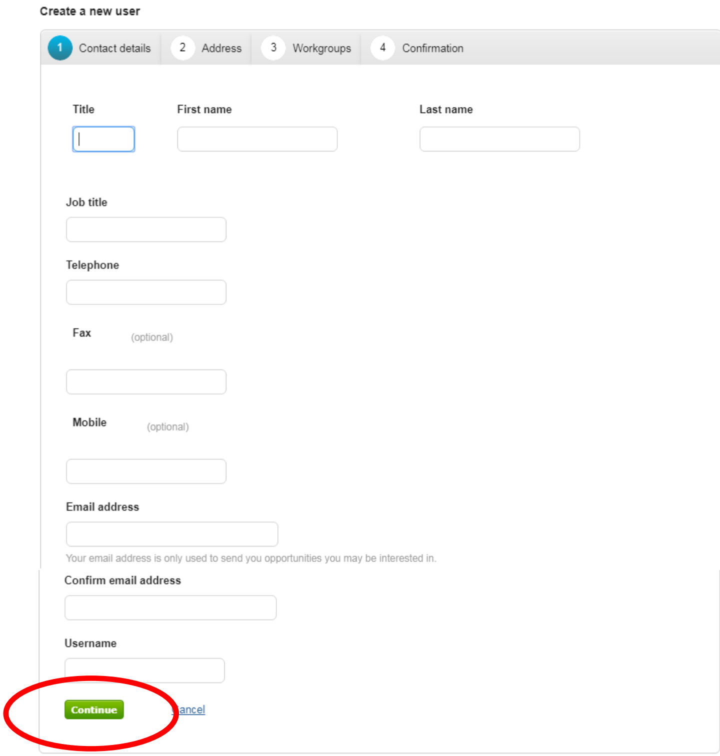
3. If a person no longer works for your organisation but has been replaced by someone and still need the Workgroup, enter the Workgroup, but this time scroll down to the Workgroup members section and click on Edit.



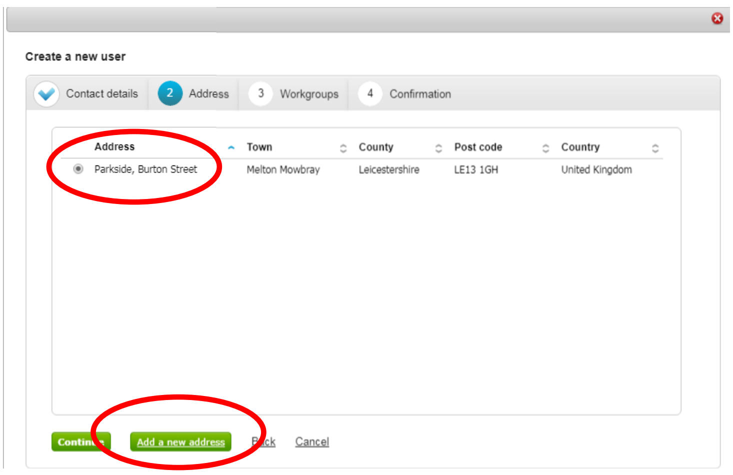
4. Deselect them as a Workgroup member by clicking on their name.



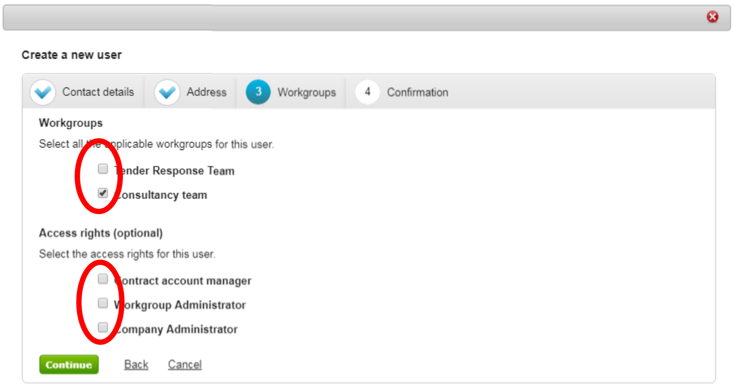
5. Create the new user by clicking on Add new contact.



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.



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