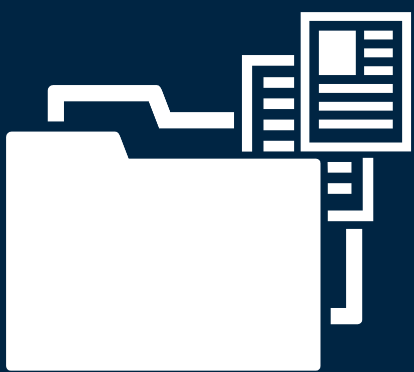
Commerce Decisions

AWARD® 6.4.5

Account Administrator's Guide



Commerce Decisions AWARD® Account Administrators Guide

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Managing Users at Account level

A User in AWARD® has roles at two levels; they have:

- an Account-level Role/Profile, for example an Account Administrator or Create Project role, or just a standard User role.
- a Project-level role where they are designated specific Roles within a particular Project, such as Project Manager, Project Support, Stakeholder or Assessor (the default).

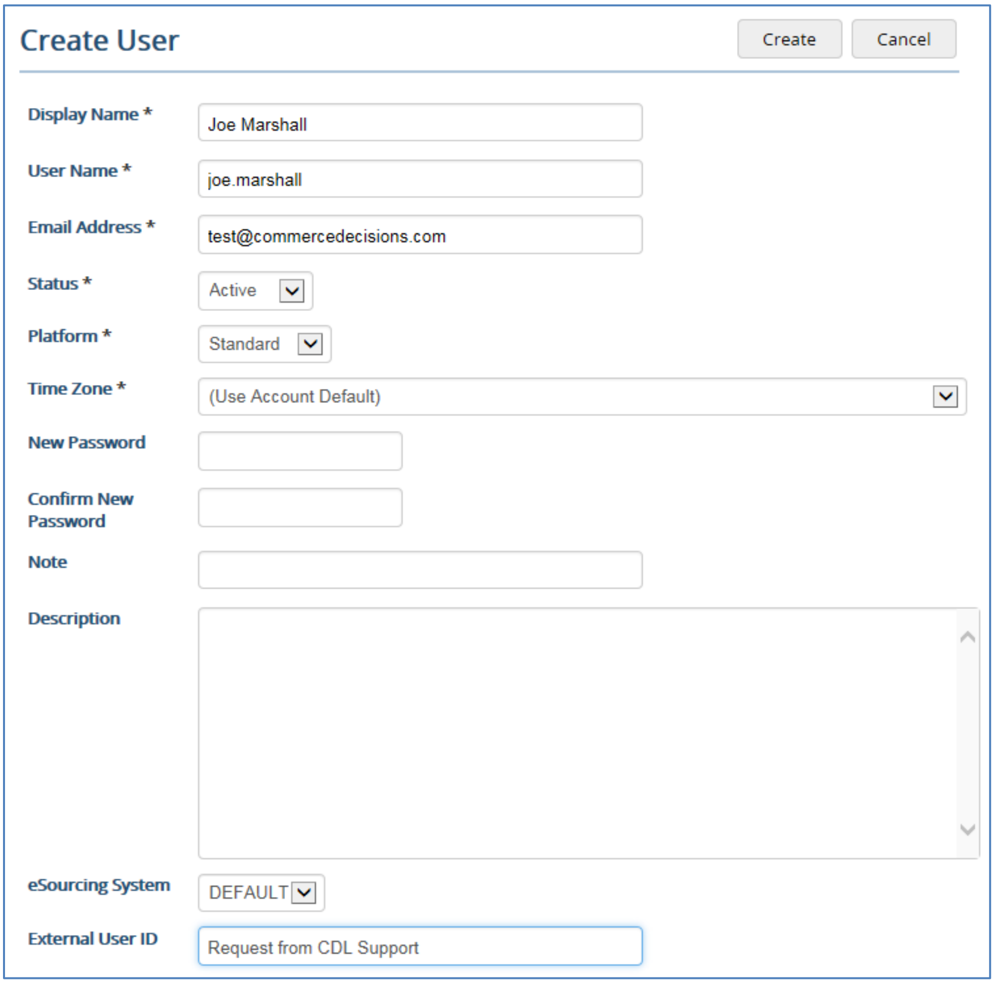
This section covers Internal Users at Account level. For information on adding Suppliers (Bidders) and Supplier Users to AWARD, see the section "Managing Suppliers and Supplier Users".

Create Account Users

Before Users can be added to a Project they must first be created in AWARD at Account level. This acts as a pool from where you can then add them to any number of Projects.

To create Account Users:

- From the AWARD Home page click the **Administration** option on the toolbar.
- Click the **Users** option on the toolbar below. The Users page will be displayed.
- Click **Create**. The Create User page appears.



The main options are:

- ☐ **Display Name** – this is the name that is displayed in AWARD. This must be unique, for example you cannot have "Jones" and "jones" as two separate users. It can be up to 50 characters.
- ☐ **User Name** – this is the name that the user will log in as. This must also be unique. It can be up to 50 characters.
- ☐ **Email Address** – this is where new Passwords and User Names, and Alerts (if enabled), are sent.
- ☐ **Status** – the user will be created in one of the following states:
- ☐ **Active** allows the user to log into AWARD – the number of active users a Project can have is defined by the Account license.
- ☐ **Inactive** disables the user's login but they can still be assigned to Projects.
- ☐ **Archived** will disable a user's login and will make them unavailable for assignments to Projects.
- ☐ **Platform** – this setting determines which AWARD platform the user will automatically be logged into by default (the user can change this themselves from their User Profile). The options available are:
- ☐ **Standard** - this is the full-featured user interface which uses JavaScript. It includes Formatted Text editing, collapsible Questions views and unsaved changes warnings and other features that are not available in the other versions. This is the recommended setting for most users.
- ☐ **Accessible** - this uses very little JavaScript and provides additional information relevant to users who are using assistive technologies such as screen readers and voice control. The accessible version is intended to provide the best interaction experience for these users. Formatted Text editing is not supported.
- ☐ **Script-Free** - this contains no JavaScript in the user interface which enables the application to work in any modern browser. It will operate within the most severe security environments, where other web applications would be unable to function. Formatted Text editing (that is, formatting of long text fields such as Rationales) is not supported.
- ☐ **Time Zone** – by default this uses the time zone for the Account. It can be changed for individual Users.
- ☐ **New Password/Confirm New Password** - You do not need to enter a password value as this will be autogenerated by the AWARD system. Please see the following sections for guidance on completing this task – this needs to be initiated by the Administrator.

- ☐ **Note** – You can use this to include information pertinent to the User, for example, their role, location or department. This can be a maximum of 100 characters.

- ☐ **eSourcing System** – this is where you specify the eSourcing portal, for example, Bravo. Please contact Commerce Decisions support who will set this up for you

- ☐ **External User ID** – used in conjunction with the eSourcing import. Please email Commerce Decisions Support (support@commercedecisions.com) so that they can apply the relevant External User ID. This restricts the user's visibility of Bravo projects to those that they are the owner of.

Account Roles

By default, a User will be created with basic (Assessor) rights to AWARD. Once they are assigned to Questions within a Project, they will be able to access the relevant Answer Sheet and view Documents, and Issues (if enabled).

To create a user with Administration rights select any of the following:

- ☐ **AWARD Administrator** – allows full access to AWARD, including the creation of Users and Projects. It is recommended that the number of account administrators are restricted due to the level of control that this role provides.

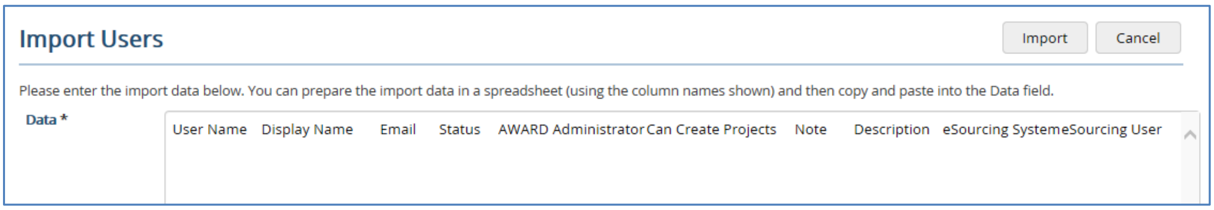
- ☐ **Create Project** – users with this role will be able to create new AWARD projects however they will not be able to access any of the account admin functions. This role is recommended for users who will be running projects e.g. Project/Procurement Managers.

Import Account Users

If you have a large number of users they are often created by importing all the appropriate details from a spreadsheet or document. Further users can be added or removed individually throughout the duration of the project.

To import pre-defined Users into the Account:

- From the AWARD Home page click the **Administration** option on the toolbar.
- Click the **Users** option on the toolbar below. The Users page will be displayed.
- Click **Import**. The Import Users page appears.

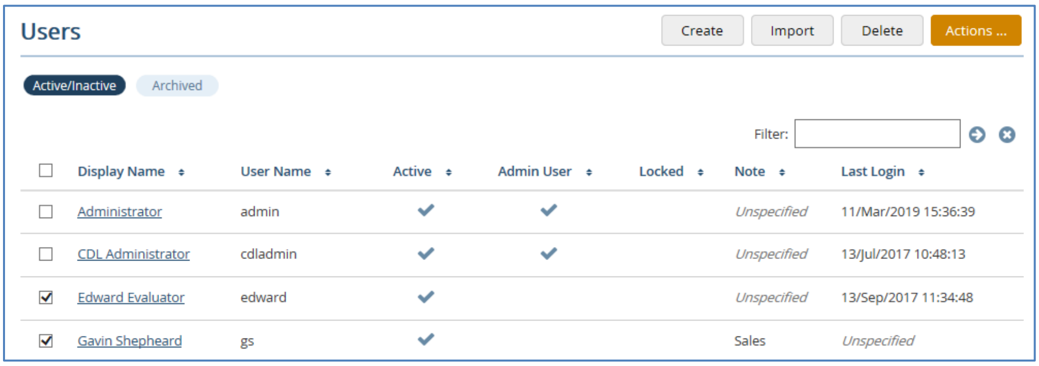


You can copy the above column headings into a spreadsheet and fill in the relevant details in the spreadsheet. You can then copy that data and paste into this field.

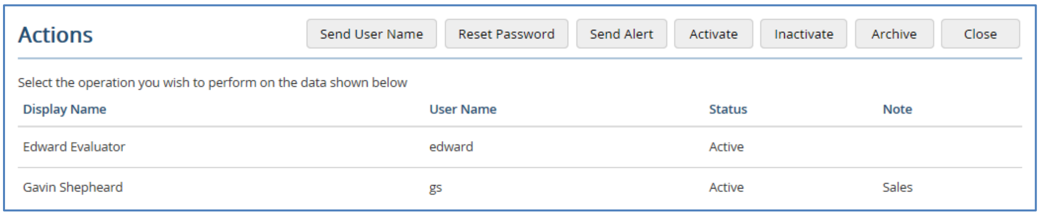
Account User Actions

Common actions such as sending a User Name, resetting a Password and changing the Users' State can be performed on one or more Users, as follows:

- From the AWARD Home page click the **Administration** option on the toolbar.
- Click the **Users** option. The list of Users will be displayed.
- Click the name of the User. The View User page is displayed.
- Select the User(s).
- Click **Actions**.



The Actions page appears.

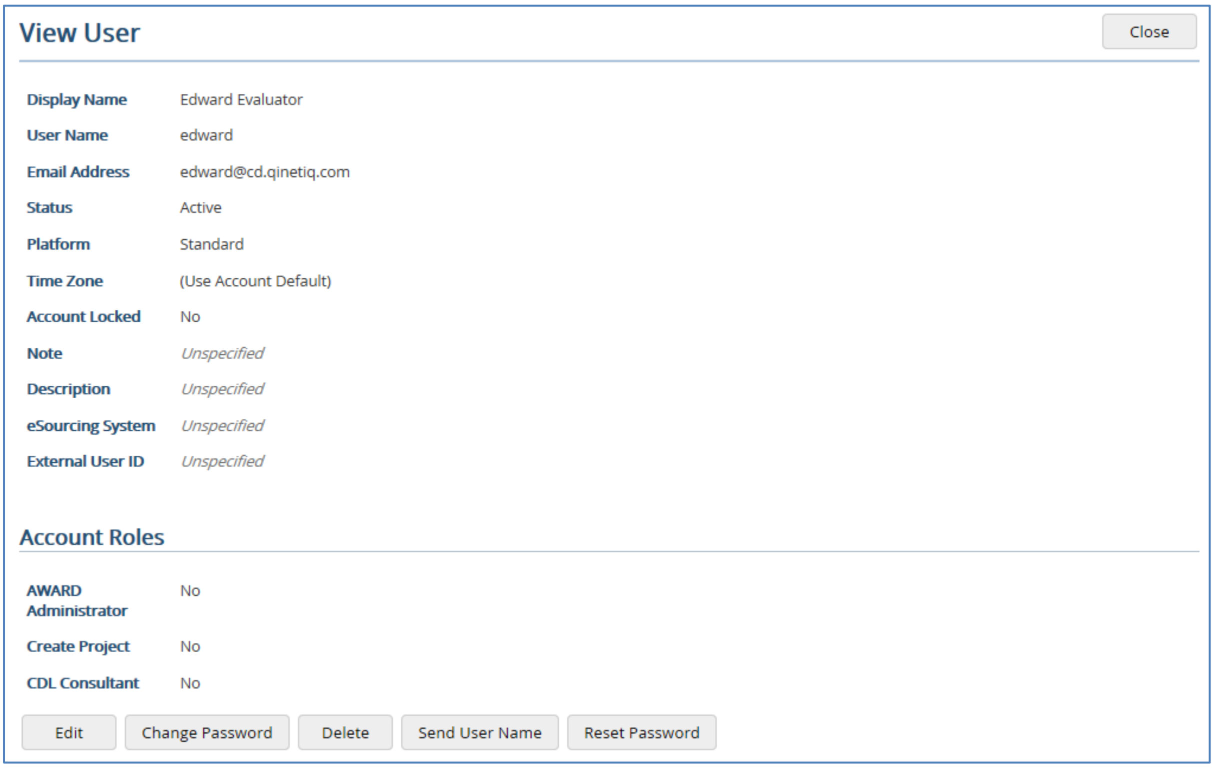


You can now perform the following on the selected Users:

- ☐ **Send User Name** – this will send the login name for the User to their email account.
- ☐ **Reset Password** - this changes the User password and will send the reset Password to their email account.
- ☐ **Send Alert** – this will send an ad hoc email Alert to Users across multiple Projects.
- ☐ **Activate, Inactive, Archive** – this will set the User account to the specified State

After clicking each option you will be kept on the same page so that you can continue to perform the required functions on the previously selected Users.

You can also perform the above actions on individual Users from the View User page:

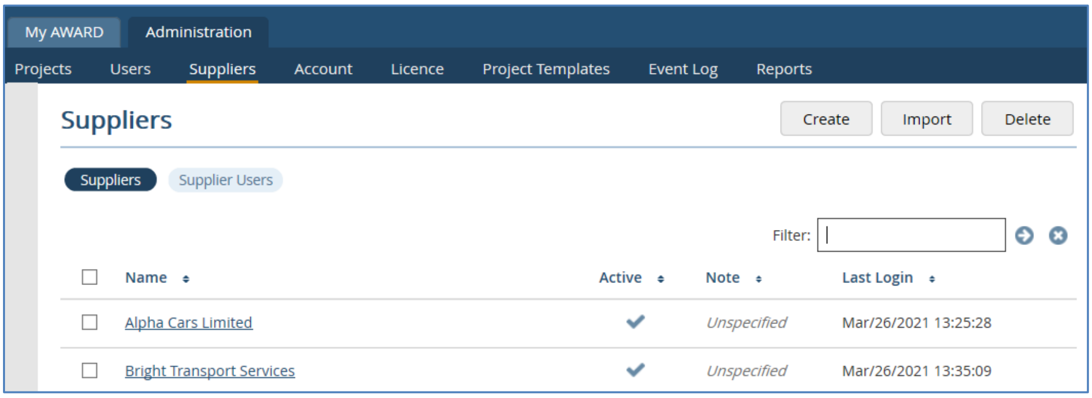

View User
Close
Display Name
Edward Evaluator
User Name
edward
Email Address
edward@cd.qinetiq.com
Status
Active
Platform
Standard
Time Zone
(Use Account Default)
Account Locked
No
Note
Unspecified
Description
Unspecified
eSourcing System
Unspecified
External User ID
Unspecified
Account Roles
AWARD Administrator
No
Create Project
No
CDL Consultant
No
Edit
Change Password
Delete
Send User Name
Reset Password

Managing Suppliers and Supplier Users at Account level

In a Supplier Interaction Project (Data Room and Evaluation Portal Projects) you will also need to define Suppliers and Supplier Users at Account level.

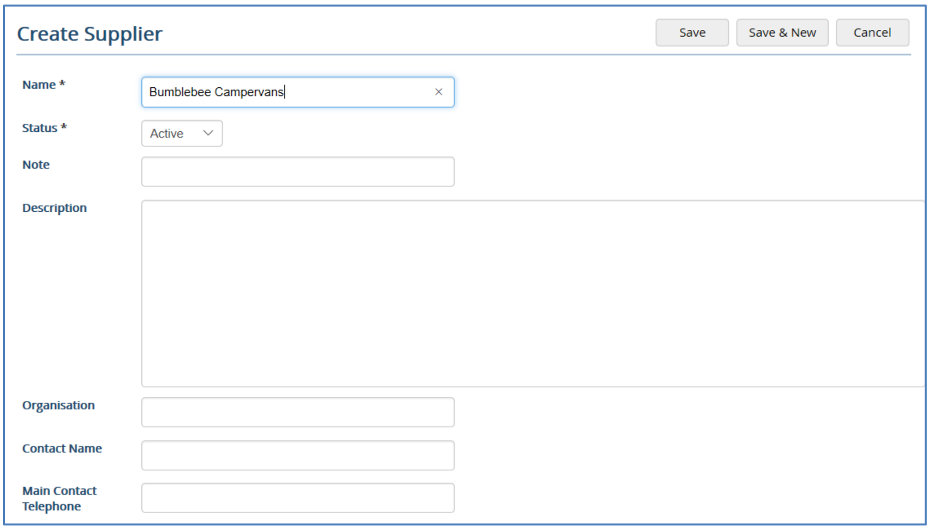
To access the Suppliers list:

- From the AWARD Home page click the **Administration** option on the toolbar.
- Click the **Suppliers** option. The Suppliers list will be displayed.



Create Suppliers

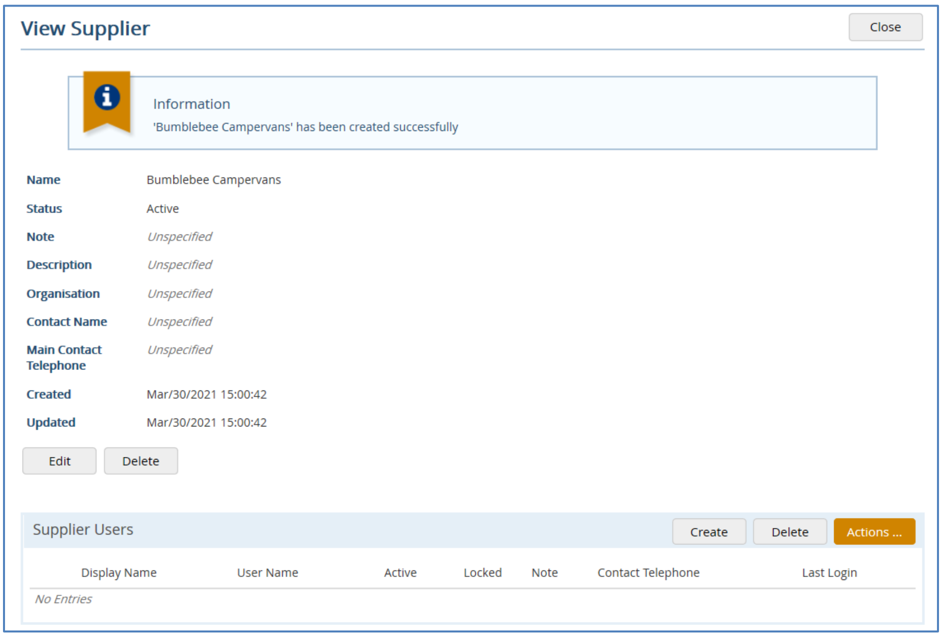
From this page you can define new Suppliers using the **Create** option:



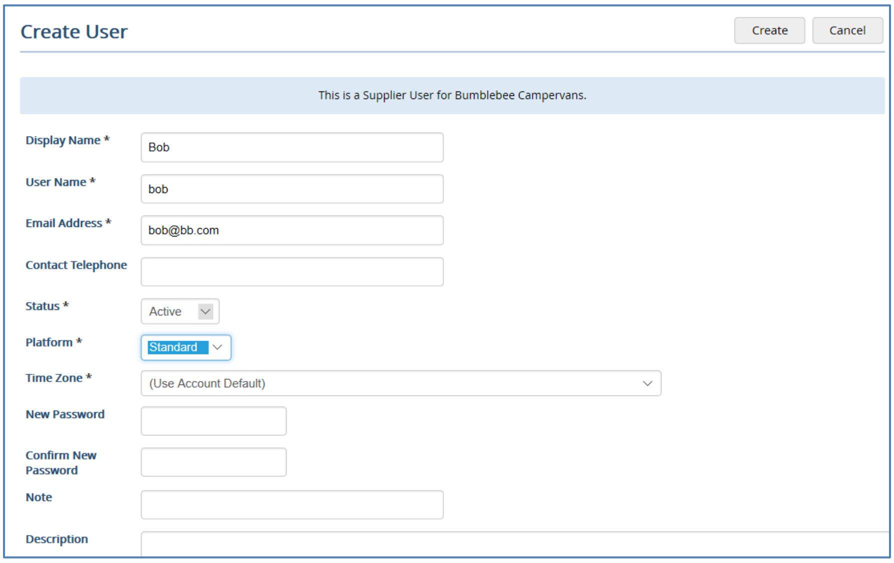
Once the Supplier is saved, you can create Supplier Users.

Create Supplier Users

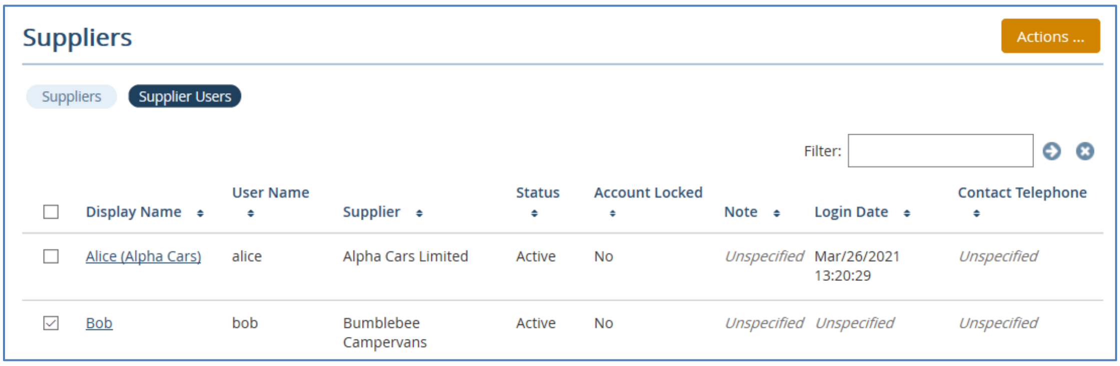
To create new Supplier Users using the **Create** option under **Supplier Users** on the View Supplier page:



The page for creating Supplier Users has the same main options as the one for creating Internal Account Users (as described in an earlier section):

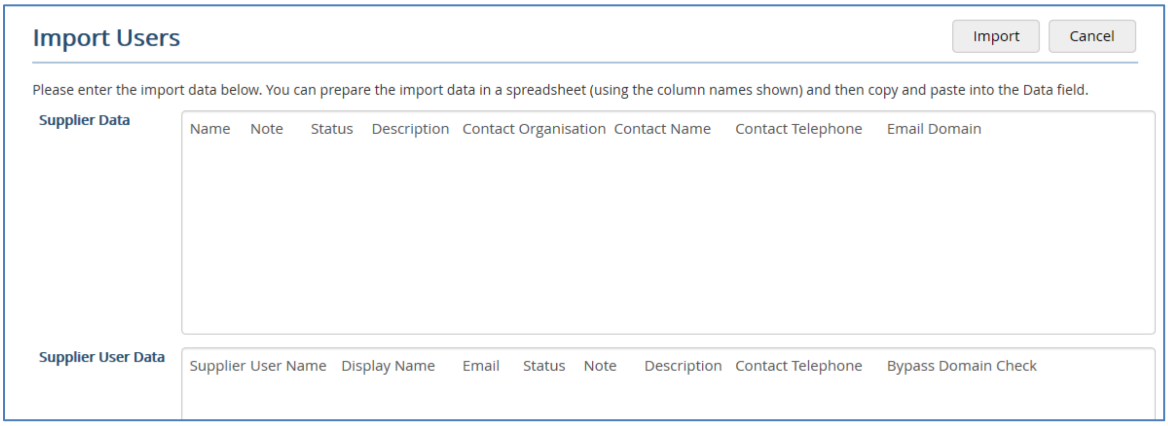


Once created, you can use the **Actions** button on the **View Supplier** page, or the **Supplier Users** view to send their User Names and Passwords and Activate their accounts.



Import Suppliers and Supplier Users

Alternatively, you can import both Suppliers and their Supplier Users at the same time using the **Import** option. The Supplier name information goes in the **Supplier Data** field and the Users in the **Supplier User Data** field:



You can import Supplier Data and Supplier User Data at the same time or separately. The fields required are similar to those for Internal Users, however there are some extra columns relating to Supplier Email Domains (if these have been enabled) – see the following section "Defining Email Domain Verification for Suppliers":

Supplier Data

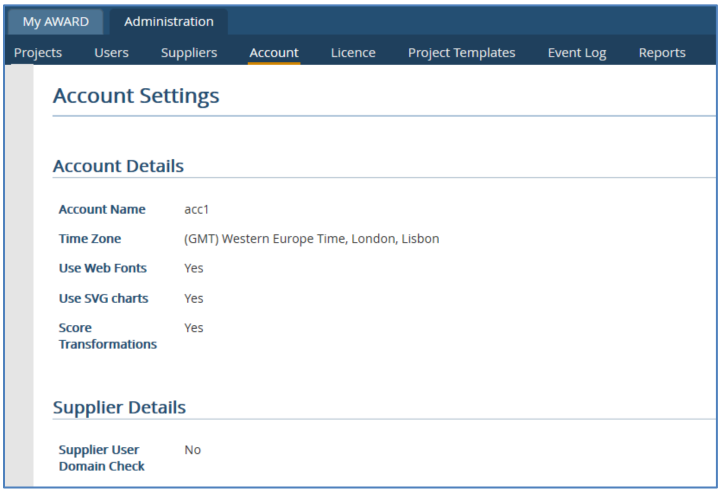
- ☐ **Email Domain** - this heading will be present if the Check Supplier Email Domain is enabled (under Account Settings). The format is the address to the right of the @ sign (excluding the @), for example, "outlook.com". You can import multiple domains against a Supplier by using columns named "Email Domain 1", "Email Domain 2", etc.

Supplier User Data

- ☐ **Email** – this must conform to a valid email format. If Check Supplier Email Domain is enabled (under Account Settings) and the Bypass Domain Check value is No the import will be blocked with a message informing you of any mismatches.

Defining Email Domain Verification for Suppliers

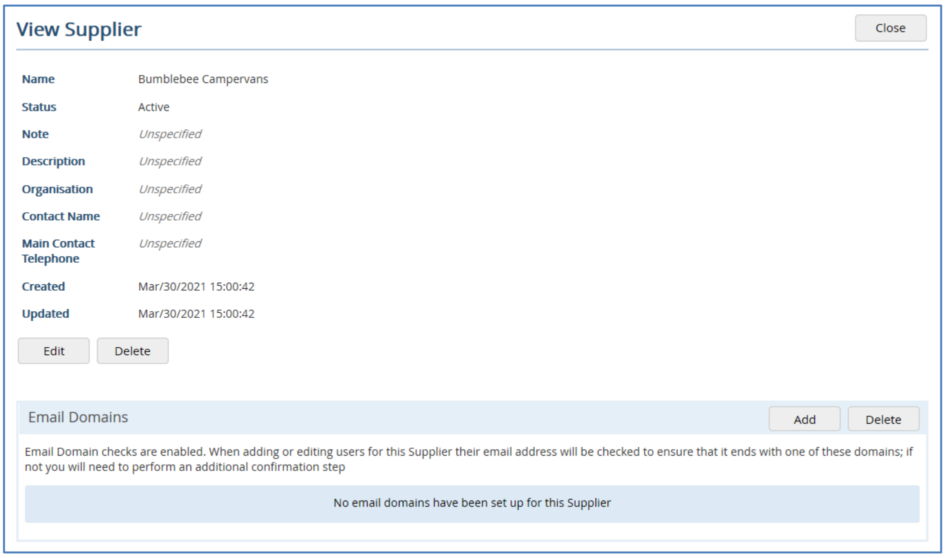
You can enable the checking of email addresses defined for Supplier Users, against a defined email domain for the related Supplier. This ensures that a Supplier User from one company cannot be created as a User for another company. You enable this from the Account Settings page by setting the **Supplier User Domain Check** to Yes (the default is No):



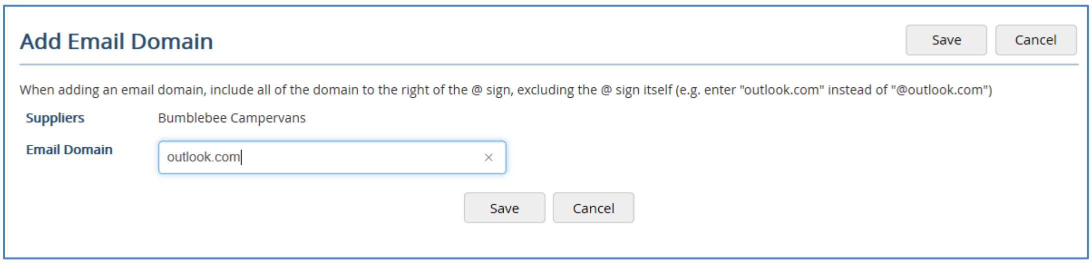
This will enable an **Email Domain** section on the View Supplier page where you can add an email domain for the Supplier.

Adding an Email Domain

- ☐ From the AWARD Home page click the **Administration** option on the toolbar.
- ☐ Click the **Suppliers** option. The Suppliers list will be displayed.
- ☐ Click the Supplier Name. The View Supplier page will be displayed. An **Email Domains** section will be present.



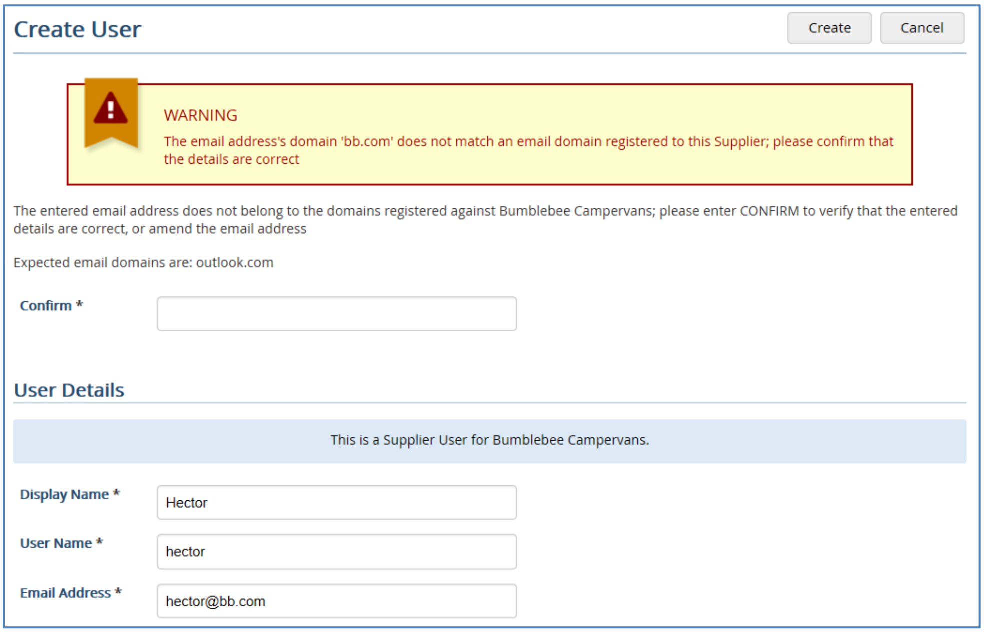
Click **Add**. The Add Email Domain page will appear.



Enter an Email domain name for the Supplier (up to a maximum of 255 characters). This is the part of the address that follows the @ sign (but does not include the @ sign), for example, "outlook.com". You can enter as many domain names as required.

📖 Note that you cannot edit a domain entry. If this is necessary you must delete the existing one and create a new one.

If you then create or edit a Supplier User's email address it will check to see if the domains match, and if not, it will display a warning but will allow you to continue with the mismatch if you specifically confirm this. If you uncheck this option after domains have been defined, the **Email Domain** section on the View Supplier page will be removed and checks will no longer be carried out.



You will also get warnings in the following circumstances:

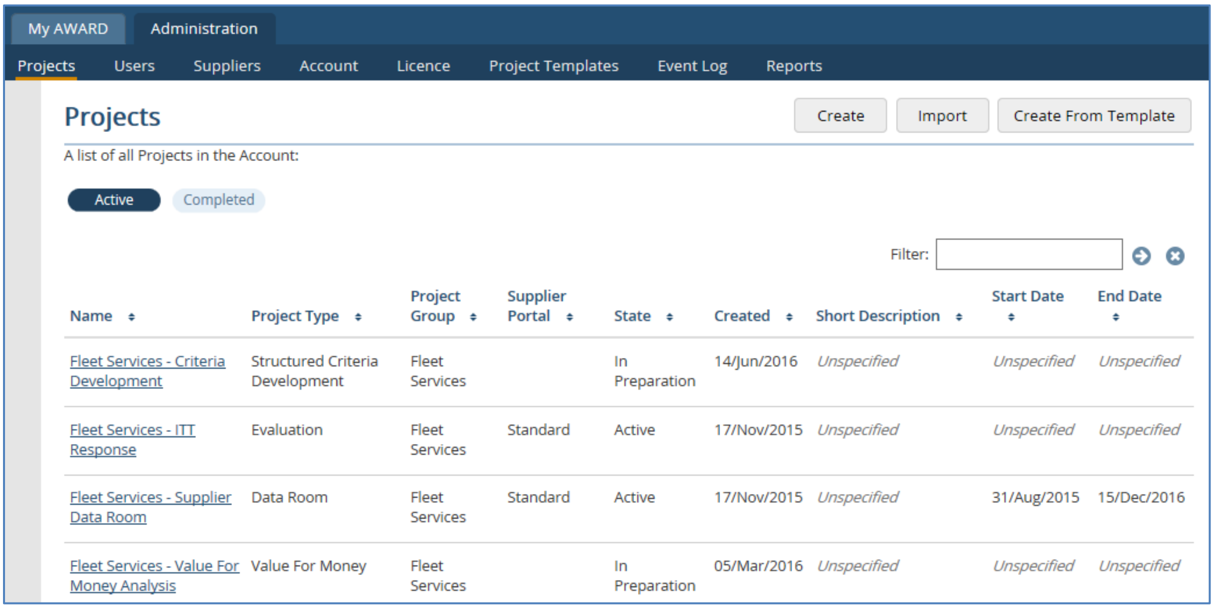
- ☐ If you change a Supplier User's email address (including the case) so that it no longer matches the domain name. Note you can change the text before the @ without getting a warning.
- ☐ If one Supplier is registered to have a particular domain, eg "hotmail.com" then adding a User against a different Supplier with an email address also ending in "hotmail.com".
- ☐ If you add a Supplier User or edit their email address but there is no domain registered to the Supplier.

Managing Projects at Account level

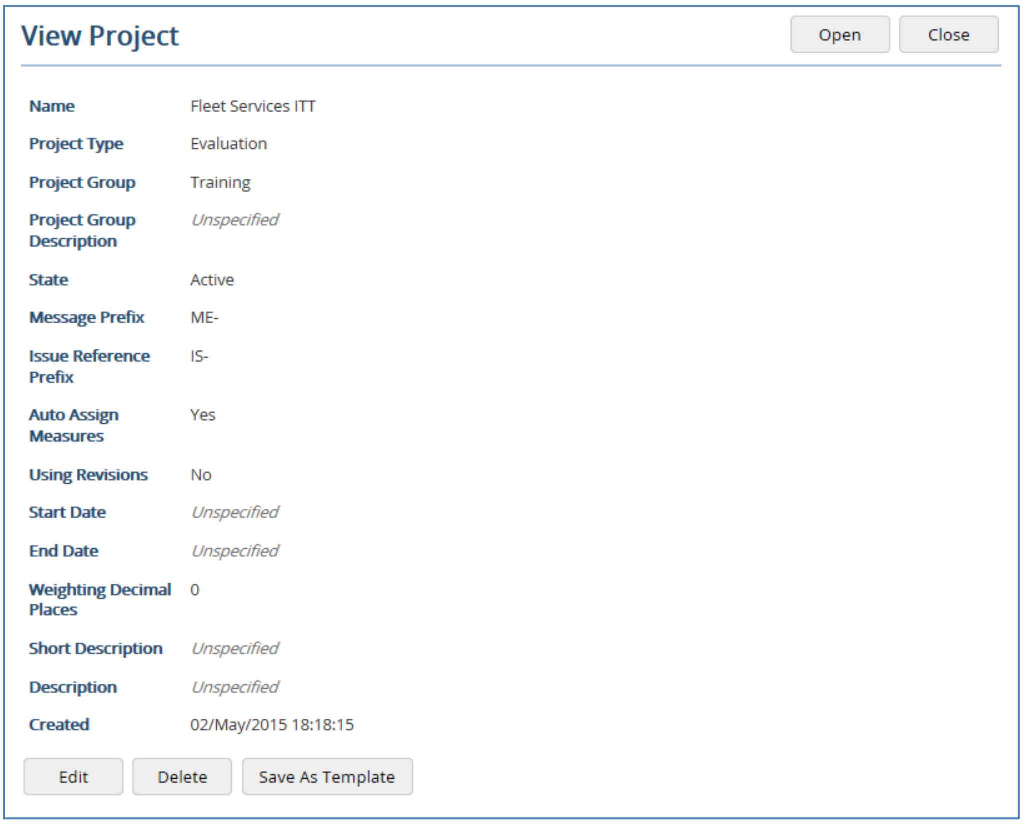
When you log in to AWARD, the main Home page will show any Projects which you have created and to which you are assigned. If you click on a Project you will be taken to the Project Home page where you will have access to all the options to allow you to configure the Project.

As an Administrator you can also view all the Projects created within the Account. These are accessed in the following way:

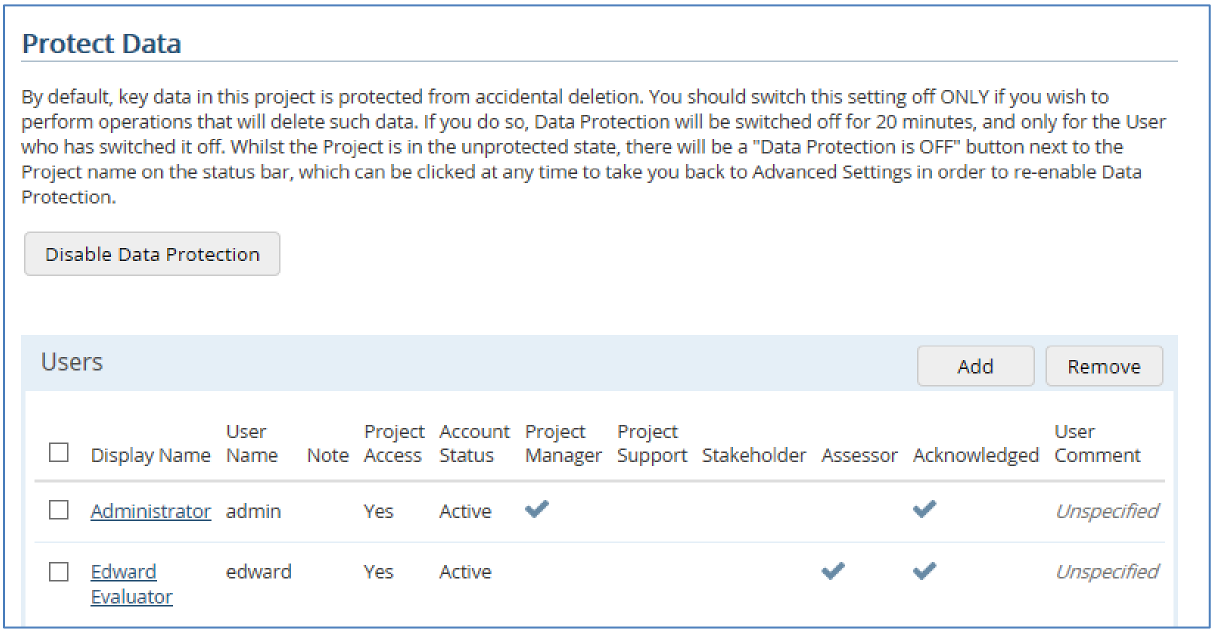
- From the AWARD Home page click the **Administration** option on the toolbar.
- The Projects page will be displayed, showing all the **Active** Projects that is, those that are "Active" or "In Preparation". The **Completed** view will show any "Completed" Projects.



Click the Project **Name**. The View Project page is displayed.



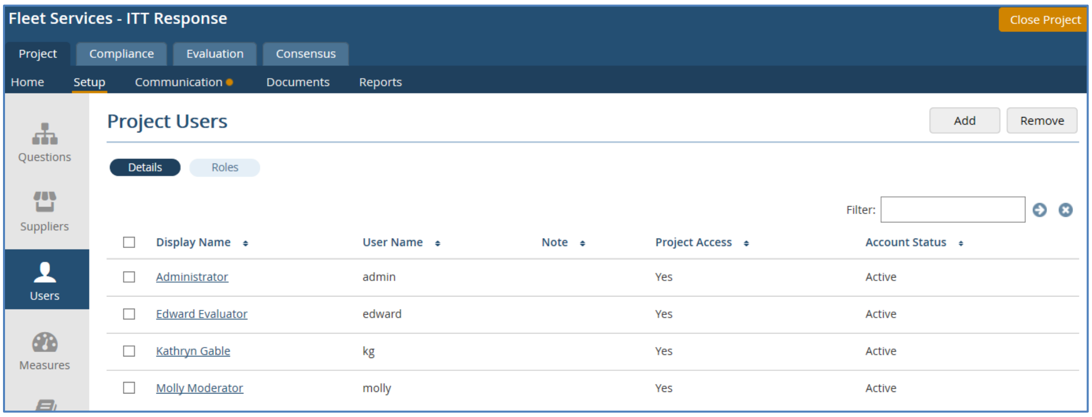
To edit any of the project details click **Edit.** This page is also the only place where you can delete a Project; you may need to use the **Disable Data Protection** function (also on this page) if you have such things as Evaluator Answers entered in the Project.



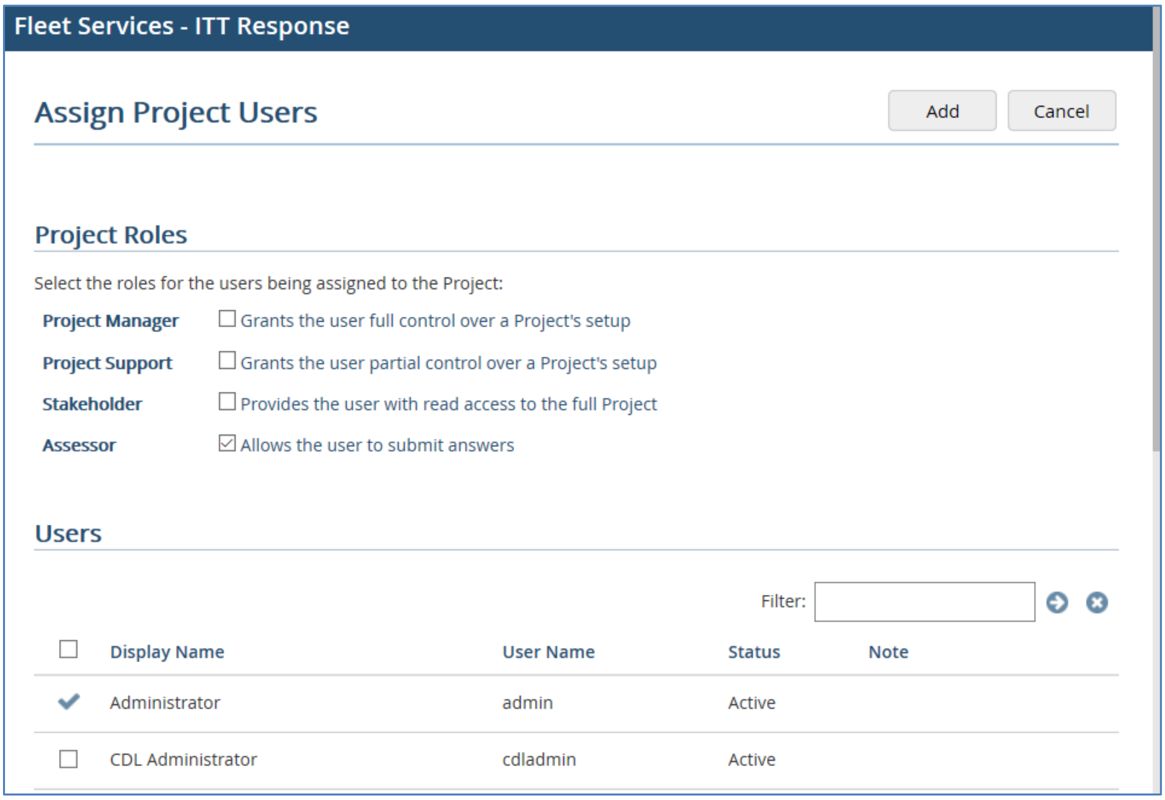
You can add or remove internal Project Users from a Project from this page. You can also do this, as well as adding Suppliers and their Users to the Project, as described in the following sections.

Adding Project Users to a Project

To add or remove Project Users click **Users** under the **Setup** option:

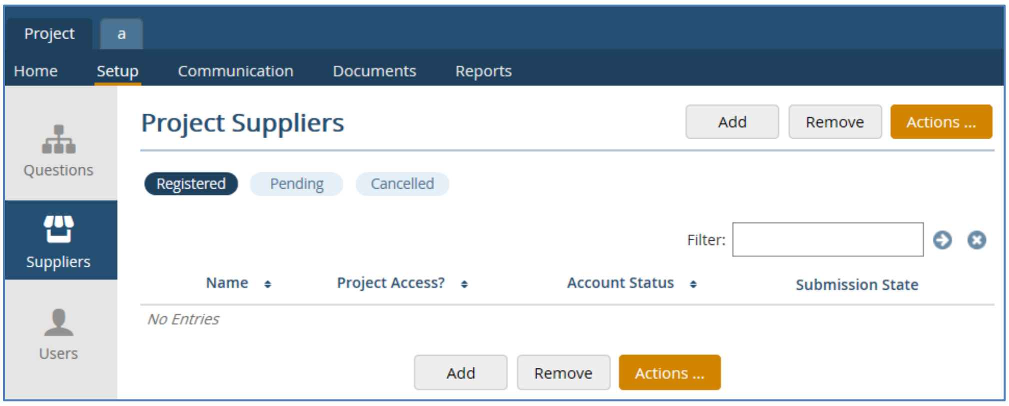


Click **Add**. When adding a User you must select at least one Project Role – the Assessor role is selected by default.



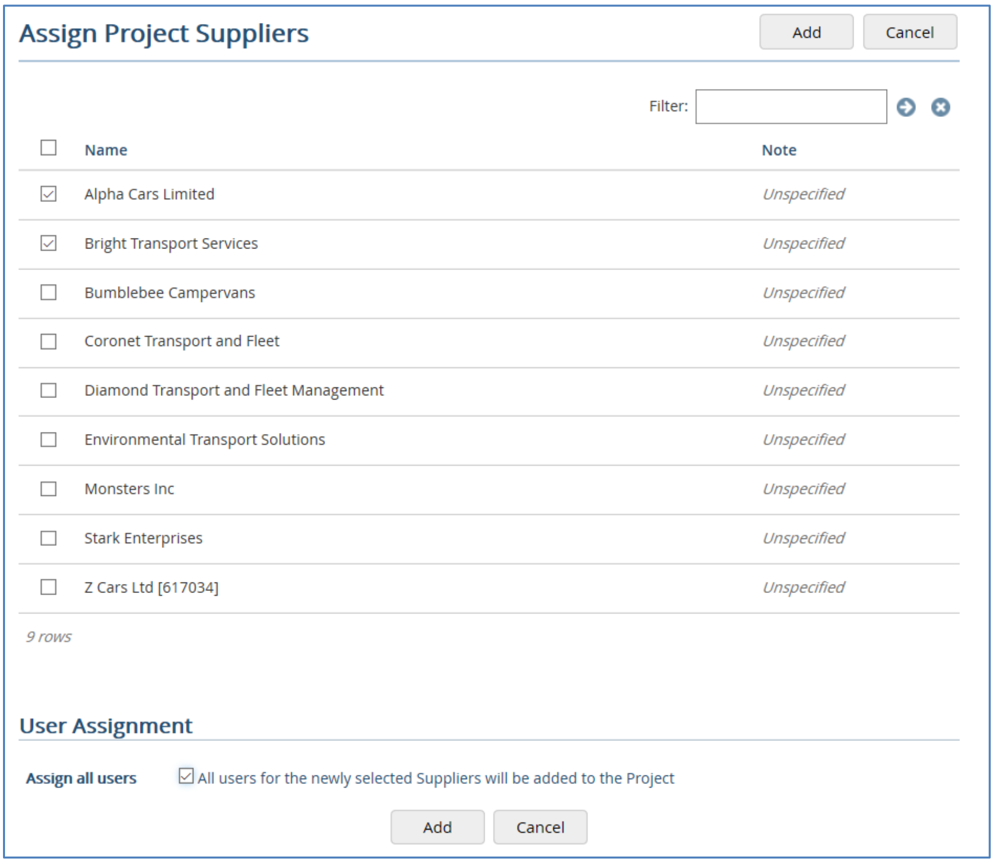
Adding Suppliers and Supplier Users to a Project

To add Suppliers to a Project, click **Suppliers** under **Setup**:



Click **Add**. All the Suppliers defined in the Account will be listed.

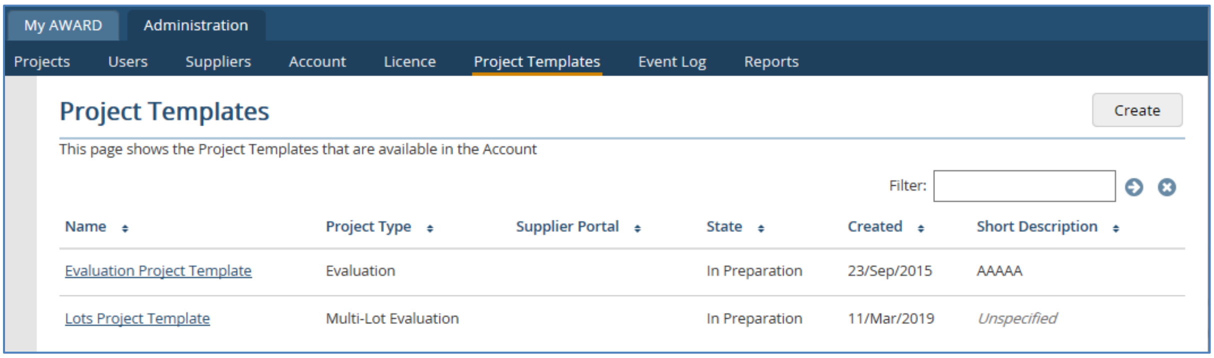
📖 Note that the **Registered**, **Pending** and **Cancelled** lozenges refer to Supplier Self-Registration – see the online help for more information.



Select those you wish to add to the Project, and select **Assign all Users** under **User Assignment** if you wish to include the Supplier Users automatically for the selected Suppliers. You will need to scroll to the bottom of the page as this option is easy to miss if there are a lot of Suppliers.

Project Templates

As an Administrator you can save any Project as a Template for future use. Project Templates are copies of Project configurations which can be used to create new Projects.



You can:

- ☐ Create a new Template from scratch – this is done from the **Create** button under the **Administration/Project Templates** menu option. This is basically the same as creating a new Project.
- ☐ Save an existing Project as a Template – this is done from the **Save as Template** button on the **View Project** page. If you have a current Project which models the type of Project you will need to use again you can use this option.
- ☐ Create a new Project using a Template – this is done from the **Create from Template** button under the **Administration/Projects** menu option. The templates available will be those created using the first two options.

Note that not all elements of a Project are created or saved in a Template, for example Submissions and Users, and you cannot perform certain actions in a Template, such as adding users and assigning them to Questions. However, when you create a new Project using the Template the full range of options appropriate to the Project will be enabled.

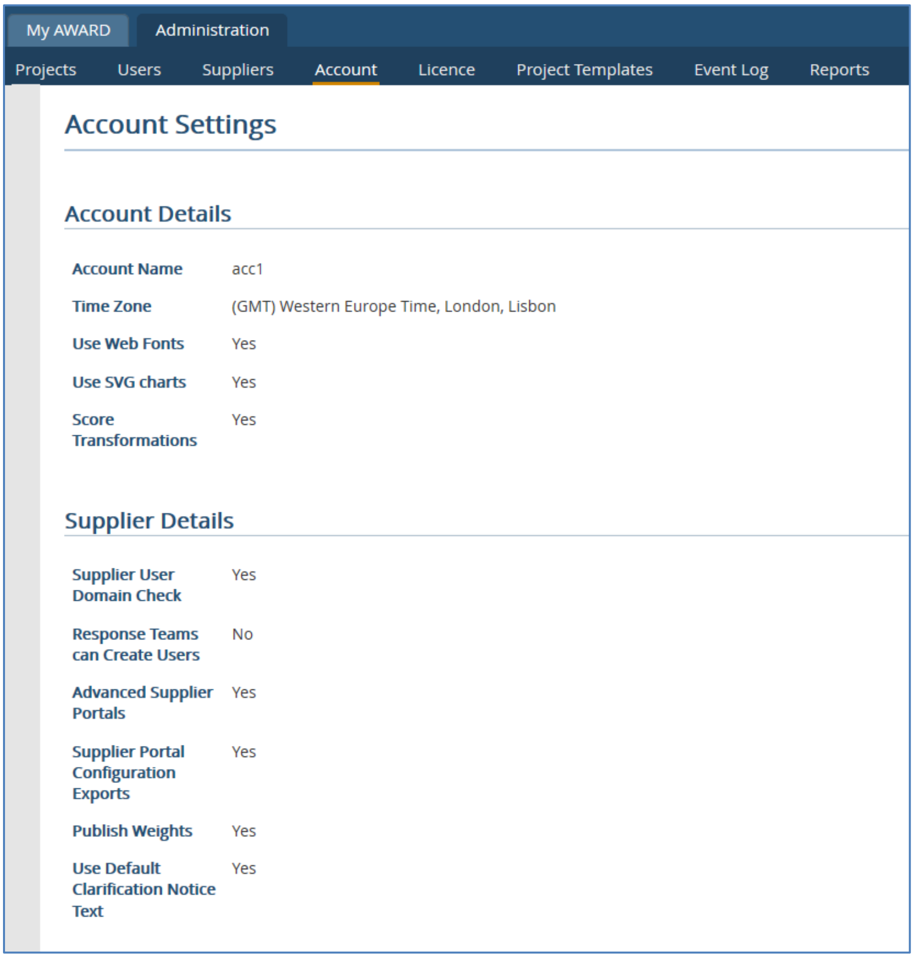
Data Protection is not applied to Project Templates, however when you create a new Project from a Template, Data Protection will automatically be applied to the new Project.

Account Settings

The Account Settings page (under the Administration/Account menu option) affects the Account and the Projects within it. To access it you must be logged in as an Administrator. It is not recommended that the Security Settings are amended.

Some customers may find it useful to update the contact details with their own internal contacts rather than the default Commerce Decisions Support phone and email.

To change these, click on any of the **Edit** buttons:



Supplier Details

- ☐ **Supplier User Domain Check** – this option enables the checking of email addresses defined for Supplier Users, against a defined email domain for the related Supplier. This ensures that a Supplier User from one company cannot be created as a User for another company. If this option is checked it will enable an **Email Domain** section on the View Supplier page where you can add an email domain for the Supplier. If you then create or edit a Supplier User's email address it will check to see if the domains match, and if not it will display a warning, but will allow you to continue with the mismatch if you specifically confirm this. If you uncheck this option after domains have been defined, the **Email Domain** section on the View Supplier page will be removed and checks will no longer be carried out.

- **Response Teams can Create Users** – this allows Supplier Response Team Managers to create new Supplier Users to be added to their Response Team. Note that you must be licensed for unlimited Supplier Users for this option to be enabled.

- **Advanced Supplier Portals** – this will be set to Yes if Advanced Supplier Portal functionality has been switched on for the Account. It can only be modified by a CDL Consultant User. (Note that for Supplier Portal Projects, if Advanced functionality is required, you must also enable this under Advanced Settings for that specific Project.)

- **Supplier Portal Configuration Exports** – in Supplier Interaction Projects this option allows you to switch off the **Advanced Options** functionality on the Suppliers' Portal pages; that is, the options that can be used by Suppliers making use of ADVANCE, or other third-party applications to prepare their Submissions. It will also remove the Project Manager's Export Configuration link(s) on the Responses Home page, the option **Include in Supplier Export** from the View Answer Measure page, and also the **Question Weights** and **Answer Measures** sections from the **Seal Portal** page. This setting can only be modified by a CDL Consultant User.

- **Publish Weights** – this defines how Question Weights will be published by default in Supplier Configuration Export files. This setting can only be modified by a CDL Consultant User. If this is checked then Supplier Configuration exports will automatically include the exact Weights for all Questions in the Portal, by default. If this is unchecked then the Question Weights will all be set to 0 in the export file, by default. (However, the Project Manager will get to make the final decision by choosing either of these options when sealing the Portal.)

- **Use Default Clarification Notice Text** – when publishing a Notice to Suppliers for a Clarification, the mandatory **Originating Supplier Clarification Answer** field is pre-populated with the default text "See linked Notification". To remove this text so that the field is blank and the Project Manager is forced to enter an answer, uncheck this option.

Contacts

- **Administrator Name** – the name of the AWARD System Administrator

- **Administrator Email** – the email address of the AWARD System Administrator

- **Administrator Phone** – the phone number of the AWARD System Administrator

- **Support Email** – the email address of the Support Helpdesk. This will be inserted into all Email Alerts that are generated, for example, User actions, Issue activity and so on

- **Support Phone** – the phone number of the Support Help Desk

Messages

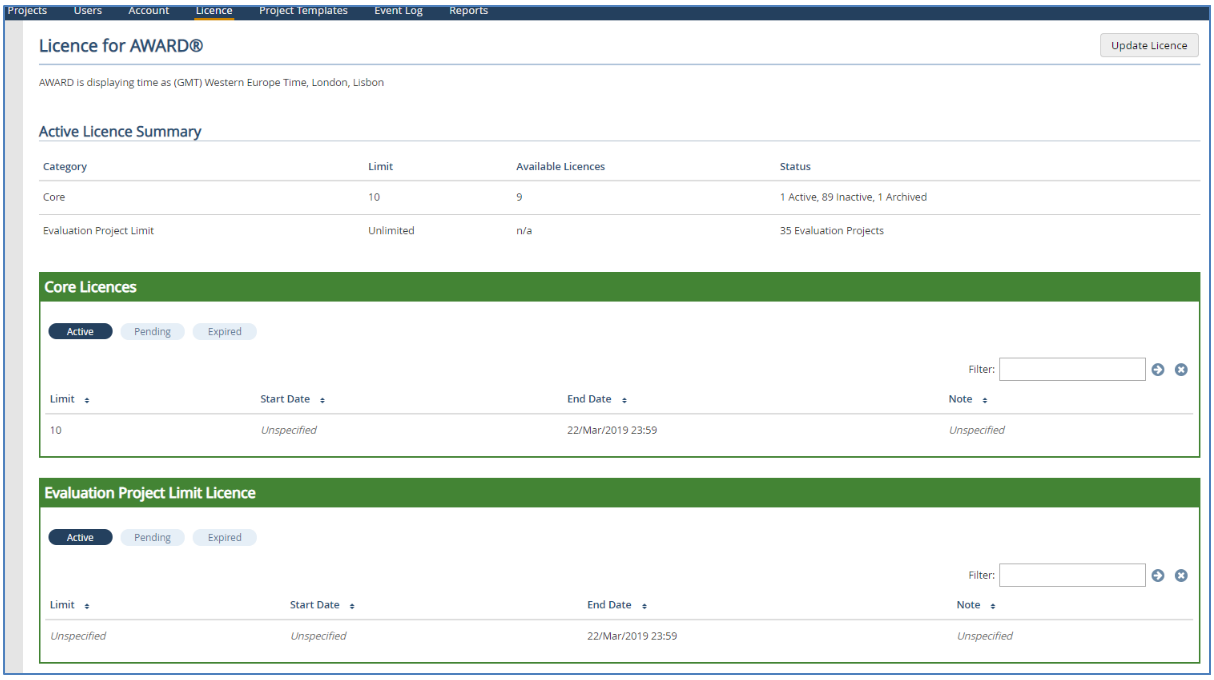
From this screen you can also edit the messages shown on the login page and AWARD home screen

- **Login Page Message** – the text entered here will appear on the Login page.

- **Home Page Message** – the text entered here will appear on the AWARD home page for the Account.

Managing an AWARD Licence

The AWARD Licence page allows you to monitor your licence status. The available licences show how many licences are available for use. Where the licence type is unlimited this will show as ‘N/A’ as there is no limit.



The colour of the border around the licence details indicate the current licence status. If the licence:

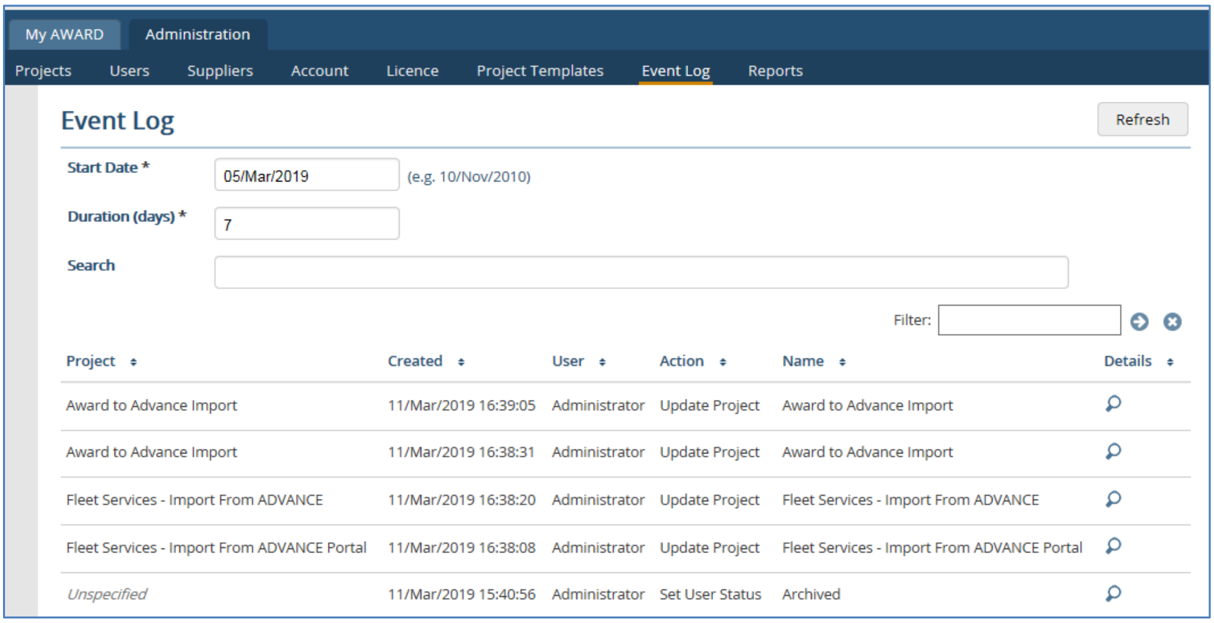
- ☐ is enabled there will be a green border
- ☐ has exceeded the number of users or the date has expired there will be a red border
- ☐ is disabled there will be a grey border

The licence breakdown is as follows:

- ☐ **Core Licences** – This defines the maximum number of Internal Users that can be Active in the Account. The Status shows the number of Users and whether they are Active, Inactive or Archived. Only active users are taken from your licence allocation.
- ☐ **Evaluation Project Limit Licence** - This enables you to create and use Evaluation/Lots Projects. The Limit is the maximum number of Projects that can be Active within the Account. The Status shows the number of Projects of this type that currently exist.

Account Event Log

The Account Event log records all actions for all Projects within the Account, as well as administrative actions such as creating Users and Projects. To view the log at Account level click the **Event Log** menu option. The Event log will be displayed showing the actions recorded over the last 7 days:



You can use the **Duration (days)** option and **Filter** field to tailor the display of events.

Account Reports

There are some Reports available at Account level to show data about the registered Internal and External Supplier Users. You can also create your own Reports using the **Manage Reports** option.