Sell2Wales
SQuID User Guide

Contents

www.cymru.gov.uk

Introduction

The Suppliers Qualification Information Database (SQuID) is a common catalogue of questions and processes for use at the supplier selection stage of procurement. For the buyers it provides a set of standard questions and a wizard tool for selecting the most appropriate questions for each individual procurement.

For suppliers, initially it means that they see greater standardisation of approach across the public sector in terms of supplier selection. In September 2015, we will be launching the SQuID online which means that suppliers' responses to a previous PQQ or ITT can be stored in a database and can be re-used for many procurements. This means that the process of tendering is simplified and saves time and money in reducing the need to provide the same information every time they respond to a procurement request.

Your Buyer SQuID Control Panel

Locating the Control Panel

The Buyer SQuID Control panel is the area of the site where you manage all of your Squizard exercises and SQuID question sets. To access the Control Panel you must sign into http://www.sell2wales.gov.uk/ and go to the Buyer Control Panel.

Main Menu > Buyers > Buyer Control Panel

Understanding the SQuID Control Panel

Below is a list of terms you should familiarise yourself with before starting the SQuID process:

SQuID is a set of common core questions to use in the selection stage.
Squizard is a risk based questionnaire that will help you generate the most appropriate set of SQuID questions.
Started Squizards are questionnaires which have not yet been completed and can be continued at any point.
Finished SQuIDs are completed question sets ready for use in a procurement exercise. You cannot edit these question sets.
Guidance is text provided to the suppliers along with the core SQuID questions.
My SQuIDs/Squizards lists are a quick way for you to locate squizards or SQuIDs generated by your own registration.
Buyer SQuIDs/Squizards lists display all of the squizards or SQuIDs created by users of your organisation, including your own.

Buyer SQuID Control Panel

Welcome to your Control Panel. SQuID is a set of common core questions to use in the selection stage of a procurement.

You will build your SQuID question set using the Squizard. This is a risk based questionnaire that will help you generate the most appropriate set of SQuID questions for your procurement.

You can use the SQuID question sets for OJEU open and restricted procedures and for procurements that fall below EU thresholds – essentially any time you need to question bidders on their financial and technical competency and their track record, it can be used.

Definitions:
- **SQuID** is a set of common core questions to use in the selection stage.
- **Squizard** is a risk based questionnaire that will help you generate the most appropriate set of SQuID questions.

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Answering a Squizard Questionnaire

How to Start a New Questionnaire

From the **Buyer SQuID Control Panel** *select* **Start New Squizard** from the **Manage SQuIDs** section.

Main Menu > Buyers > Buyer Control Panel > Buyer SQuID Control Panel

You will now be presented with a set of questions:

- **Bilingual SQuIDs** – Choose either "create in English and Welsh" or "Create in English only" depending on whether you wish to produce a question set in one or two languages. Note that this option cannot be amended once the squizard has been started.
- **Title** – A descriptive title for your squizard exercise. This field is mandatory.
- **Description** – A description of the squizard exercise. This field is optional.
- **Notes** – Notes relating to the squizard exercise for internal use only. This field is optional.

After entering the appropriate answers to the questions *select* **Save** which will take you to the Squizard questionnaire.

Working through your Questionnaire

After completing the introductory details for your questionnaire you will now work your way through a risk based questionnaire that will help you generate the most appropriate set of SQuID questions. The process of answering the questions is carried out in the **Squizard Questions** tab.

Each question is displayed in turn under the 'Question Answer' section.

After reading the current question you should choose from the available answers in the dropdown list to the right of the question and then *select* **Continue**.

As you answer the questions the amount of overall questions will increase dependent on your answers.

Many of the questions have accompanying guidance for buyers and can be accessed by *selecting* **Guidance**.

As you answer certain financial appraisal questions your risk score will increase as displayed against 'Your Risk Score'.

There is the option to add a note to any of your questions by *selecting* **Buyer Notes**. These notes are for your own organisation only and will not be displayed to the buyer.

SQUIZARD			SQUID		
Squizard Questions	Questionnaire	All Questions	SQuID Questions	Included	Excluded

Answer each question in turn, selecting your answer from the drop-down box and then clicking "continue". At any point during the Squizard process you can return to an earlier Squizard question from the Questionnaire tab.

Once you answer questions in the "Economic/Financial Standing" section, check the 'Risk Score' box to see your risk score, based on your answers so far, to determine your method for checking the financial stability of the bidders.

BACKGROUND QUESTIONS   Question 1 of (17 *increases as you progress*)

QUESTION ANSWER - answer the current squizard question

Is your procurement connected to construction works?

Please select from the available answers below

Please select... ▼

Continue

YOUR RISK SCORE

Your risk score is shown below, based on your answers so far, to determine your method for checking the financial stability of the bidders.

0 points

Insurance Only

Your risk score is 0 - 3 points. This suggests your procurement has up to approx £35k impact. It is recommended that you check insurance only.

The guidance below is used to determine your method for checking the financial stability of the bidders.

- 0 - 3 points (up to approx £35k impact): check insurance only
- 4 – 7 points (approx £35-85k impact): light-touch check of financial standing
- 8 or more points (approx £100k impact and over): in-depth check of financial standing

GUIDANCE - see further guidance relating to this question.

BUYER NOTES - add a note about this question for your own reference

At any point you can save and exit the process to come back and complete the squizard at a later date. By *selecting* **Save & Exit** the work you have done to date will be saved and the squizard exercise will be locked for editing by your registration only.

Understanding the Sections

There are six tabbed sections at the top of the questionnaire process page. The questions in the questionnaire sections are grouped under **Squizard** and the questions to be exported at the end of the exercise are grouped under **SQuID**.

Other than the **Squizard questions** tab described in the previous section there are five other tabs which are explained below:
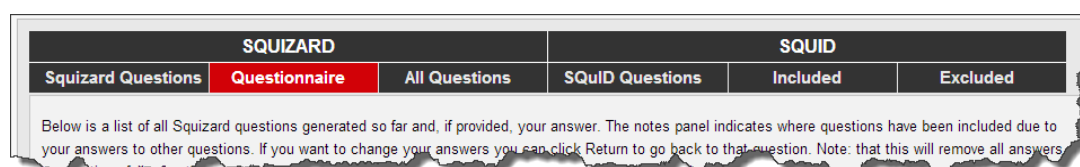
- **Questionnaire** – A list of the Squizard questions which have been generated for you to answer based on the answers you have provided up to any given point. This also shows the notes you have provided against any question and in some cases why a particular question has been included for you to answer.
- **All Questions** - A comprehensive list of all the possible questions you may be asked in this questionnaire.
- **SQuID Questions** - A comprehensive list of all the qualification stage questions. **Included** - A list of all of the qualification stage questions which will be recommended based on the squizard questions already answered.
- **Excluded** - A list of all of the SQuID questions which up to this point have not been recommended based on the questions already answered.

Changing Your Answer to a Question

If you wish to change the answer to a previously answered question you can do this from the Questionnaire tab. To return to a previous question you should *select* **Return** next to the appropriate question.

Note: that this will remove all answers to questions that follow the one you choose to return to. The reason for this is that the questions in the questionnaire are generated based on your answers, and therefore the rules have to be reset to ensure you are answering the correct questions.

Finishing a Squizard Questionnaire

Completing the Questionnaire

After working your way through all of the questions in the questionnaire there are four remaining steps required to finish your questionnaire before exporting the completed SQuID question set.

1. You will have the opportunity to exclude or include standard SQuID questions and add your own bespoke questions.
2. You will be able to mark certain questions as mandatory for the supplier to answer and pass/fail if a certain answer would result in the supplier failing the process.
3. Where you have set questions as pass/fail you will have to enter the parameters by which an answer would result in failure.
4. You will have the opportunity to modify the supplier guidance for each question.

You can at any point return to the relevant stage of the completion process using the breadcrumb trail.

1. Start	2. Questions	3. Confirm	4. Options	5. Pass/Fail	6. Guidance

To confirm you have completed the squizard select **Continue** which is presented at the end of the questionnaire.

At this point you can still access your questions via the Questionnaire tab or by *selecting* **View Answers**.

Including and Excluding Questions

The next step presents you with a list of the SQuID Questions included or excluded for export. At this point you have the option to manually include or exclude questions.

To exclude a question from the export you go to the **Questions Included** tab and *select* **Exclude** next to the relevant question.

To include a question for export you go to the **Question Excluded** tab and *select* **Include** next to the relevant question.

Creating Bespoke Questions

You have the option to create your own bespoke questions specific to your procurement exercise to be included in the question set. To do this *select* **Create a Question**.

You must then assign the new question to an existing section using the drop down menu before entering the question text and supplier guidance. Note: if you have chosen to do a bilingual SQuID exercise the text must be provided for both languages.

You must provide the answer type associated with the question choosing from the following:

Yes/No Value: The response can be selected as Yes or No
Options List: This provides a list of response options for a single option to be selected
Multi Choice Options List: More than one response option can be selected from the Multi Choice Options List
Text: This question type allows a text response of up to 2000 characters to be entered
Numeric: The response entered must be strictly numeric
Date: This question type requires a date
Attachment: The response will require an attachment to be uploaded

If you select options list or multi choice options list you must also add the possible answers. To do this *select* **Update** and then add each possible answer.

When your question set is complete *select* **Continue**.

Setting questions and mandatory and pass/fail

You can optionally flag questions as mandatory and/or pass/fail.

Marking a question as mandatory means the supplier must provide an answer when completing the SQuID.

Marking a question as pass/fail means suppliers can pass or fail the tender process depending on their answer to these questions.

When the facility for suppliers to respond to SQuID questionnaires has been introduced on Sell2Wales, scheduled for September 2015, suppliers will be provided with information on which questions may cause them to fail before they begin completing the questionnaire. If you are exporting your question set to etenderwales, only the Pass/Fail settings for Option List and Multi Choice Option List question types will be carried over. Additionally, etenderwales cannot accept Pass/Fail details for Bespoke questions.

To mark questions as mandatory or pass/fail you should tick the box in the relevant column. Some questions cannot be marked as mandatory or pass/fail in which case 'N/a' will be shown in the column.

Once you have marked all your questions appropriately *select* **Continue.**

Providing details of Pass/Fail questions

For each question that you marked as Pass/Fail in the previous step, you must update the pass/fail answers or add some Pass/Fail guidance for the supplier. To do this you must *select* **Edit** next to each question.

You must then provide details of what answer would cause the supplier to fail. If the question is a yes/no, options list or multi choice options list you are asked to select the answer or answers which would result in a fail. You are also requested to input text to explain the circumstances of a pass/fail. Once you have entered these details *Select* **Continue.**

Questions which are still to be updated are found in the Pending tab, and questions which you have already updated can be found in the Updated tab. Once you have updated them all *select* **Continue**.

Modifying SQuID Question Guidance

The final step in completing the Questionnaire is to make any required changes to the supporting guidance which is exported with the SQuID questions.

To edit the guidance for any question you should *select* **Edit** next to the relevant guidance.

After you select to edit the guidance you will be presented with the current guidance which can be modified it as required.

If you selected to create the Squid in English and Welsh then you will have the option to edit the guidance in both languages.

When you have made the required changes *select* **Save**.

Finishing your Questionnaire for Export

The final step in completing your Questionnaire is *selecting* **Finish** on the guidance page. You will be asked to confirm that you are finished. Once you confirm this the SQuID can no longer be modified.

Exporting the SQuID Questions

After completing your SQuID Questionnaire you will have the option to export all of the questions into Excel or Word format, as well as the option to export the results in the appropriate configuration format for import into the Bravo system (etenderwales).
After finishing a questionnaire you will automatically be taken to the export page. You can also access it from the Buyer SQuID Control Panel and selecting the relevant SQuID exercise. If you want to export into Excel or Word you should select the relevant icon.

If you want to export into a configuration for uploading into etenderwales you should choose the appropriate configuration from the drop down menu and then *select* **Export**. See the next section for details on how to upload your question set into etenderwales.

Uploading your question set to etenderwales

Please note that some systems will download the Excel file from Sell2Wales with a "Protected View" setting, which is not permitted in the etenderwales system. Before uploading the file to etenderwales you must:

Open the exported file.
At the top of the worksheet *select* "Enable Editing".
Save the file.
You can then upload it to etenderwales.
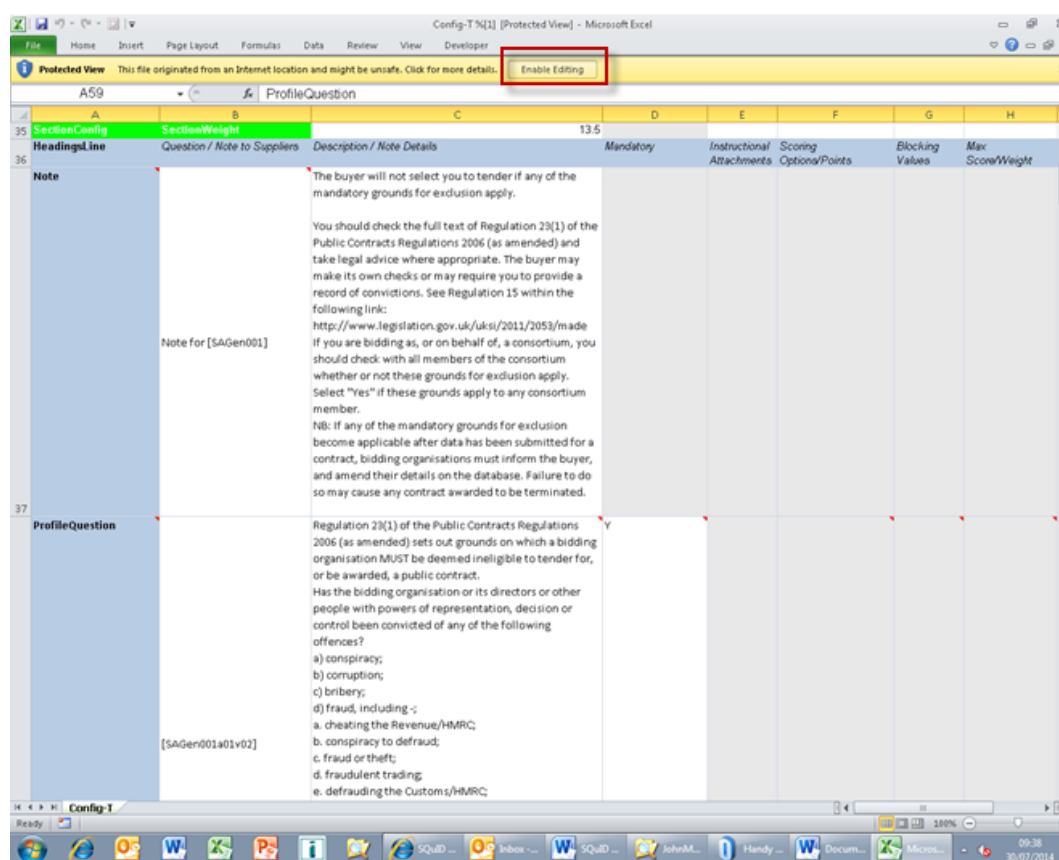
Locking and unlocking your Squizard

When you create a Squizard exercise it will automatically be locked to your user registration. This means that no other user can amend it. If you do require another user to complete your exercise you can unlock it from the 'Buyer Started SQuIDs' list by *selecting* unlock.

If the user who has the squizard exercise locked is unavailable the Sell2Wales support staff can unlock it further to an e-mail request.

Further information

If you have any queries about the SQuID creation process or online tool please contact the Sell2Wales support team on 0844 561 0672 or help@sell2wales.gov.uk