

ICN Employer's Agent User Guide



My Dashboard

'My dashboard' contains an overview of the schemes you have been appointed on through the ICN framework. Just click on any scheme and it will take you through to the scheme detail page.

The dashboard also has a summary of all call offs and mini comps you have been issued on, as well as mini comps and call offs which require your attention. If a client has made a call off request for your works/ services it will display on your dashboard with an amber alert symbol. You will be required to click on this call off and either "accept" or "decline" this opportunity. If accepted, it will display under 'schemes' on 'My dashboard'. If declined, you will be requested to explain your decision and this call off will be removed from your dashboard.

You have the ability to follow or unfollow a scheme within your company. If you click 'Show user specific scheme' then only the schemes you are following will be displayed under 'schemes'. If you untick this box, it will display all schemes within your company. To find out how to follow or unfollow a scheme, please read the 'Direct award and call off' step within this user guide.

There is also a list of all the notifications sent to you relating to your schemes.

Documents library

In the document library you will view and download all the standard ICN documents, including JCT contracts; ICN Employers requirements; standard house types; Design Guide; consultant service briefs and allocation letters; KPI workbooks; Contractor pricing (restricted access).

There is a search function within the document library to assist with finding your documents.

Profiles

The profile section includes company profiles of all the ICN contractors, consultants and clients. It includes a brief description about each company and also lead contact details. You have the ability to edit your description.

In this section you will also be able to see which lots the contractors and consultants are in.

You have the ability to upload your insurance document, these documents can then be easily accessed by clients. The first set of documents have already been uploaded onto your profile page, but when they expire you will receive a notification requesting you to upload your renewed documents. If your insurance documents are not displaying or have expired since the portal has launched please click 'add new' under the related documents heading and follow the instructions to upload the document.

Meetings

In the meetings section you will be able to see all ICN meetings you have been invited to in the past and also future meetings. You will also be able to access all documents relating to a meeting including agenda, minutes and supporting documentation.

Direct award and call offs

When a client has issued a call off via direct award, and has requested your services, the lead contact at your company will receive an email notification. By clicking the link from this notification, you will be directed to the call off detail page where all information relating to this call off will be displayed. You will need to either "accept" or "reject" this call off using the buttons at the top right of the page . If rejecting the call off, you will be required to explain your decision. By accepting this call off you will become a Project Team Member, and will access scheme details and the social value commitments.

When you become a Project Team Member on a scheme you will be able to adjust which user from your company can view and manage that scheme. At the bottom of a call off detail page under 'scheme followers' you have the ability to add users to a specific scheme by clicking on the plus button next to the users name. If there are schemes which you are following which you are not working on, you can click the minus button to remove yourself. When following a scheme you will receive notifications in relation to that scheme. If you 'unfollow' a scheme you will not receive notifications for that scheme, so please ensure that this feature is updated.

Mini competitions

If a mini competition has been issued by a Client you will receive a notification with a link taking you through to the opportunity. The format of all mini comps through ICN will be initial issue of Expression of Interest (EOI) and then either single stage or two stage tender. All suppliers in the lot will be issued with the initial EOI. You will be required to "accept" or "decline" interest in the opportunity. Once 'accepted' you will proceed to the next stage of the mini comp. If 'declined' you will be required to give a reason, and you will have no further part in the mini competition and it will be removed from 'my dashboard' under the 'mini comps' header. All information regarding the mini competition will be displayed on the mini comp detail page. You will receive notifications throughout the mini competition. All tender documents will be uploaded onto the portal in the relevant tender stage document upload section by the Client. These documents will be accessible to download by the bidders in the mini competition. The evaluation of each stage of the mini comp will take place off the portal by the client. Please do not upload your completed tender documents to the portal. All tender documents should be sent via email to the tender return contact within the given dates and timeframes. You will receive notifications throughout the course of the mini

competition. Announcing the successful supplier will be done through the portal. If you have been successful in a mini competition, the scheme will display under 'schemes' on 'my dashboard'.

Manage a Mini Competitions on behalf of a Client

If you have been called off as an Employer's Agent for a scheme, the client can allocate you to manage the mini competition. The client is required to complete the mini competition form and submit it to ICN, but once this has been submitted and approved you will be able to control the mini comp. You will be able to add documents to the relevant stages, view contractors responses from EOI, proceed through the different stages and act on behalf of the client. The evaluation of each stage of the mini comp will take place off the portal by the client and/or the EA, and when the mini comp process is complete, the client or EA will be required to complete and submit a tender summary form. Announcing the successful supplier will be done through the portal. Please ensure that all the mini competition information is kept up to date by using the 'edit' button at the top right of the mini comp detail page.

Schemes

When a call off has been "accepted" or a mini competition has been 'won', this scheme will display on 'My dashboard' under 'schemes'. If a call off has been "rejected" then that scheme will not display under your schemes.

To view an existing scheme

View a list of your existing schemes either through the 'scheme' button on 'my dashboard' or on the menu on the left. Click on the scheme to view the scheme details.

Notifications

You will receive an email notification whenever an action is required. These will include when a call off or mini comp has been issues, when insurance/ accounts documents have expired, and reminders. The email will contain a link to take you to the relevant page in the portal.

If you have any questions or require assistance navigating around the portal, please contact ICN@greatplaces.org.uk