

ICN Client User Guide



My Dashboard

'My dashboard' contains all the information about the schemes you have created and will procure 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 you have made and the mini comps you have issued. Any scheme that have been drafted but not yet submitted for approval will be shown on the dashboard under the 'drafts' section.

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; ICN benchmarking data; ICN social value tool; Consultant fees (restricted access).

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

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

Contractors and consultants also have the ability to upload their accounts and insurances in this section, which can then be viewed by clients.

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.

Schemes

The portal works on the basis that clients must set up a new scheme before any call offs or mini comps can be issued. Once created, you will then be able to view all activity relating to your scheme in one place. All schemes and call offs have been backdated, if you notice any schemes which are not showing, please get in touch with ICN.

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 'scheme'. To find out how to follow or unfollow a scheme, please read the 'To create a new scheme' step within the user guide.

To view an existing scheme

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

To create a new scheme

To create a new scheme, either click on "schemes" from the menu on the left and click "create a scheme", or from "My Dashboard" click "see more" on the right of your scheme table. This will take you to a summary of all your schemes. From here you can create a new scheme by clicking on the "create" button top right. When you have completed the necessary fields, then please click either "submit" or "save draft". If you click submit, a notification will be sent to the ICN administrator to approve the scheme. Once approved you will receive a notification via email and you can then make call offs or start the mini comp process.

You can upload files to your scheme using the "add a file" button, such as KPI workbooks and scheme costs analysis forms. All documents added to a scheme have restricted access on, so cannot be viewed by contractors or consultants.

When a scheme has been created you will be able to adjust which user from your company can view and manage a scheme. At the bottom of a scheme 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 user's name. If there are schemes which you are following, you can click the minus button to remove yourself. If following a scheme you will receive notifications in relation to that scheme, so please ensure that this feature is updated.

Direct award and call offs

To create a call off, first you will need to have set up a "scheme". Once you have done this, go to the scheme details either through the "scheme" option in the menu on the left, or through your dashboard. Click on "create a call off" and complete all the necessary fields. You can then either "save draft" to come back to at a later date, or click "submit". A notification will then be sent through the ICN administrators to approve. Once approved you and the successful supplier will receive a notification via

email and you will be able to see the call off information including selected supplier (if no preference was selected) fees, social value pledge and confirmation of insurance.

If your call off is rejected, follow the link received in the notification, or click on the call off in the scheme detail page. To change the supplier you will need to click 'Edit' and then click the supplier which has been suggested and 'confirm changes' You will then be required to click 'submit' and fill in the required field. This will then be sent through to ICN administrator for review. If you do not wish to change supplier, do not click edit, you will need to just click 'Submit' and fill in the required field.

When making a call off, the client is able to select a preferred supplier who they would like to work with or they can select "no preference" and the ICN administrators will select the most appropriate company based on experience, area of operation and performance.

Documents uploaded to a call off can only be viewed by the client, selected supplier for that call off and ICN.

Mini competitions

If you would like to make an award by going out to mini competition rather than by direct award, firstly you will need to have set up a "scheme". Once you have done this you can start the mini comp process by clicking on "create mini comp" from the scheme details page. Complete all the necessary fields and then either "save draft" to come back to at a later date, or click "submit". If you have called off an Employer's Agent through the framework you will be able to allocate them to manage the mini comp on your behalf, once it has been submitted and authorised by ICN Admin. Documents can be uploaded that are to be issued with the mini comp notification. 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. All tender documents should be uploaded onto the portal in the relevant tender stage document upload section. These documents will be accessible to download by the suppliers in the mini competition. 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.

Notifications

You will receive an email notification throughout a scheme when an action is needed or if approval has been given by ICN administrators. The email will contain a link to take you to the relevant page in the portal. You will also receive notifications when documents are required at the different stages of a scheme. Please can you ensure that the Start on Site and Practical Completion dates are accurate.

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