

Product Updates

S2C – V24 Release 24.9

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1 How to Use this Document

The product updates offer brief, high-level descriptions of enhancements and new S2C features. They also include setup information, implementation tips to help you get started, and best practices to ensure your continued success.

2 How & When do Features Become Available?

Some features may affect all users immediately after the release goes live whilst other features require direct action by an administrator before users can benefit from the new functionality. Each feature listed within the release notes section will indicate the 'Availability' as either:

- Immediate
- Subject to Configuration

3 Browser Support

The Internet Explorer 11 web browser launched in 2013, when the online environment was much less sophisticated than the landscape today, and since then, open web standards and newer browsers have enabled better, more innovative online and accessible experiences. As such, Microsoft will end support for Internet Explorer 11 across its Microsoft 365 applications and services on 17 August 2021. This means on the date given, Proactis solution users may find certain features cease to function when accessing the application using the Internet Explorer 11 browser.

Whilst we appreciate this change may be difficult for some users, we strongly advise customers to use our recommended supported browsers as soon as possible.

As a reminder, the latest version of the following browsers is supported:

- Google Chrome
- Mozilla Firefox
- Microsoft Edge

4 Release Highlights

These are covered in detail within the Release Notes section under the following headings:

- Library Upgrades and Security.
- Improvements to “Dynamic Open Framework” Sourcing Project Template Type/Process
- Introduction of Notices Tab for new FTS Notices:
 - Sourcing Project Progress Page
 - Quick Quotes
 - Contracts
- Sourcing RFX Requests and templates: New “Use CDP” Setting
- Interim Supplier Network changes for CDP

5 Release Notes

5.1 General Note re: Release of new FTS Notices

It is important to note that this Release of Proactis Rego Source to Contract contains the new Forms that have been made available by the UK Cabinet Office. This will be released to the UAT Environment initially but cannot be made available in the LIVE System until the Central Digital Platform is made Live.

5.2 Enhancements

Library Upgrades and Security

Area: Library Upgrades and Security

Availability: Ongoing, across this and future releases

Description

A number of individual work items will be delivered across multiple releases to support the new library upgrades within Proactis S2C. Please note that the library upgrades do not affect the end user experience.

Proactis thrives to keep our applications up to date to ensure that the site you are using are protected and secure. We are working on several security enhancements and vulnerability repairs across multiple releases.

The specific updates in this release are detailed in the following table:

Reference	Description
192827,192683,192686,192687,192688,235036	Library Upgrades and securities

190642/190639 - Project Template & Project Procurement Regime Setting

Area: Sourcing

Availability: On Configuration of FTS Notices Function

Description:

In readiness for the UK Procurement Act a new setting has been made available to Sourcing Project Templates, and Sourcing Projects to allow the use of existing Find a Tender Service (FTS) Notices under PCR2015 regulations, and the new set of FTS Notices to be made available along with the release of the New UK Procurement Act (PPA2023), and Provider Services Regime (PSR2024).

NOTE: this functionality is only enabled where customers have the FTS functionality enabled for their Organisation.

The "Procurement Regime" Setting will determine which version of the FTS Notices the Project(s) should use and will also determine where the Notices will be made available in the system.



As such, there is a distinction between using the existing Notices for PC2015-related Projects on the Notices Tab of the RFX Request and using a new Notices Tab that has been made available on the Sourcing Project Progress Page that will display the new Regime of FTS Notices for PPA2023/PSR2024 related Projects.

A Sourcing Project Template is shown below with the Procurement Regime Setting displayed:

The “Procurement Regime” Setting will default to display PCR2015.

The Sourcing Project Template Setting for the “Procurement Regime” will determine the default setting for the Sourcing Projects initially created from the template. The “Procurement Regime” Setting can be over-riden on the Sourcing Project, as below when amending a Project:

231686 - Notices Tab for new Procurement Regime FTS Notices on Project Progress Page**Area:** Sourcing**Availability:** On Configuration of FTS Notices Function**Description:**

As noted in the previous section a new Procurement Regime setting will determine whether FTS Notices are made available on the RFX Request Notices Tab (PCR2015 Form Versions), as per existing functionality, or if set to PPA2023/PSR2024 Project will display the new Regime of Forms on a new Notices Tab on the Sourcing Project Progress Page. This is shown below:

Sourcing Project 1000002 - Dynamic Open Framework

Close Amend Tasks Members Closing Date Requests Responses Evaluation Auction

Overview Suppliers Contracts Dialogue (0) Correspondence Approvals **Notices**

Notice Distribution Channel

Description	Selected
FTS	<input checked="" type="checkbox"/>

FTS

Form	Status	Actions
Modification notice	Not submitted	
Preliminary Market Engagement Notice	Not submitted	
Planned Procurement Notice	Not submitted	
Tender Notice	Not submitted	
Transparency Notice	Not submitted	
Contract Award Notice	Not submitted	
Contract Details Notice	Not submitted	
Contract Change Notice	Not submitted	
Contract Termination Notice	Not submitted	
Procurement Termination Notice	Not submitted	

1 2

NOTE: Only FTS Notices are available on this new Tab. The Proactis Supplier Network and Contracts Finder Notices are still managed through the RFX Request, along with FTS Notices for PCR2015 Regulated Projects.

190730 - Notices Tab for new Procurement Regime FTS Notices in Quick Quotes**Area:** Sourcing**Availability:** On Configuration of FTS Notices Function**Description:**

As the new regime of FTS Notices are required for Light Touch Procurements and below threshold procurements, the FTS Notices functionality has been extended to Quick Quotes. As such, where the FTS Functionality is enabled a "Notices" Tab will make the new regime of FTS Notices available.

RFQ 1000010 - Quick Quote

Save Close Issue Delete History

General Items Suppliers Documents Access Rules Notices

Notice Distribution Channel

Description	Selected
FTS	<input checked="" type="checkbox"/>

Channel Details

Form	Status	Actions
Modification notice	Not submitted	
Preliminary Market Engagement Notice	Not submitted	
Planned Procurement Notice	Not submitted	
Tender Notice	Not submitted	
Transparency Notice	Not submitted	
Contract Award Notice	Not submitted	
Contract Details Notice	Not submitted	
Contract Change Notice	Not submitted	
Contract Termination Notice	Not submitted	
Procurement Termination Notice	Not submitted	

NOTE: where Contracts are created from a Quick Quote, the Contracts FTS Notice functionality (see below) will refer back to the underlying Quick Quote so that there is one truth of the Notices. Where multiple contracts are created from the Quick Quote, all Contracts' FTS Notices will be associated with the Quick Quote. This ensures that there is one version of the truth from a data perspective.

190654 - Notices Tab for new Procurement Regime FTS in Contract Management

Area: Sourcing

Availability: On Configuration of FTS Notices Function

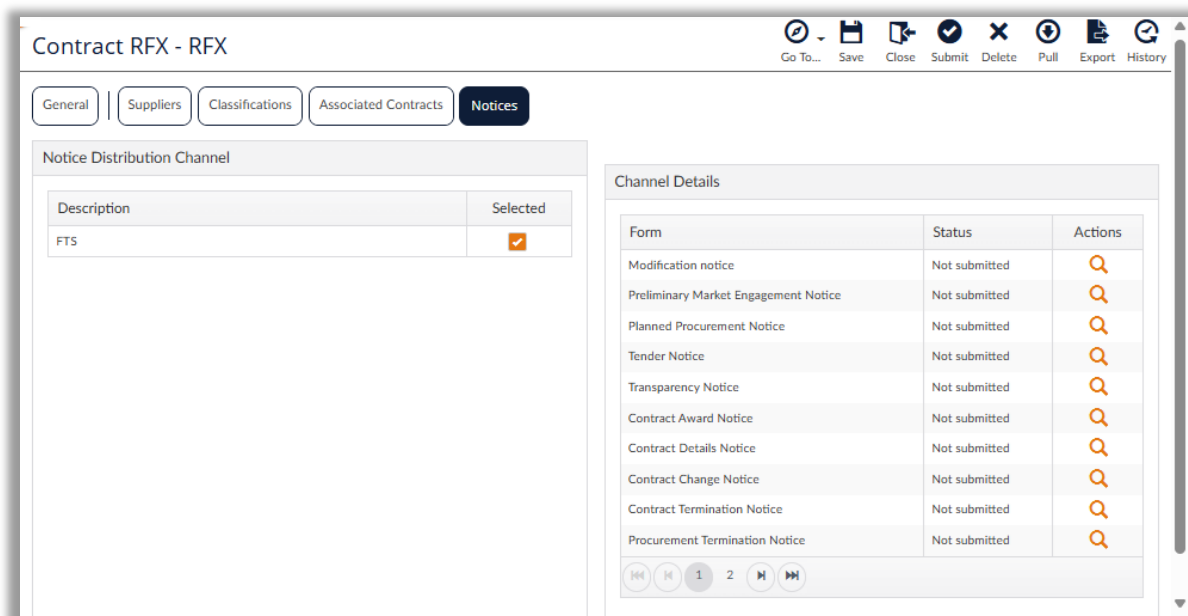
Description:

Under the new Procurement Act Contracting Authorities are required to provide more transparency of Contracts awarded. As such, Contract Management has been enhanced to include a “Notices” Tab on Contracts where a customer is using the FTS Notices functionality. The Notices Tab is only designed to work with the New Regime of FTS Notices.

The “Notices” Tab is available in the Contract Management Configuration Tab Group Structure in the “Overview” Tab Group. Security of the Tab is controlled by the Contract Role Tab permissions only that can be set to “No Access”, “Read Only”, or “Full Access”. The Default role is set to “No Access” initially and the Contract Manager Role is set to “Full Access”. It is important to note that only the “Full Access” Tab permission will allow access to the FTS Notices on the Tab.

The Notices Tab can be made available per Contract Template. As it is a Core System Tab, it can be re-located to any Tab Group, as required.

Once applied the Contract Notices Tab will be displayed as below:



NOTE: the FTS Notices are linked to the Contract’s Source. That is, if the Contract was created from being awarded from a Sourcing Project, the FTS Notices will refer to the Sourcing Project. This allows visibility of all notices throughout the Procurement and Contract Management processes. Also, where multiple contracts are created from a Sourcing Project each Contracts Notice Tab will relate to the Sourcing Project. As such, there is just one version of the notices,

It is a similar principle for Contracts created from a Quick Quote.

Contracts that are manually created or imported into Contract Management will have the FTS Notices for the individual contract.

232559/232178/232189 - Dynamic Open Framework Improvements**Area:** Sourcing**Availability:** On Configuration**Description:**

The previous release of Proactis Rego S2C included a new Sourcing Project Template Type for “Dynamic Open Framework”. This is a new concept that has been introduced as part of the UK Public Procurement Act 2023.

The basic principles of an Open Framework are they can be established for a maximum of 8 years with an initial 3 year period, followed a subsequent period of 5 years. Contracting Authorities are required to “Refresh” the Framework at least once in the 1st 3-year period, and at least once in the subsequent 5-year period. The “Refresh” is a new process whereby the Framework is re-opened for new applications for a defined period, and dependent on whether the Framework has been setup with a maximum number of Suppliers or not, the Contracting Authority can decide whether to automatically re-award Suppliers on the existing framework, or to re-invite them to respond. This is not a per supplier option, it is for all suppliers on the existing framework.

As such, this is a multiple stage function that will create new contracts at the end of each stage. This is different to all other Project Template Types where Shortlisting is used for multiple stages.

Each change to the Dynamic Open Framework Project Template Type will now be described.

Adding Stages to a Dynamic Open Framework Template

To introduce consistency and compliance to the functionality, when adding a Stage to a Sourcing Project Template the Stage added will be the default for the Dynamic Open Framework. As such, every stage will work in the same manner, and contracts will be created at the end of every stage.

When adding a Stage to a Sourcing Project Template for a Dynamic Open Framework, the following page will be displayed:

The screenshot shows a dialog box titled "Template Stage Maintenance". It has a close button (X) in the top right corner. The form contains the following fields:

- Code:** A text input field with a red border, containing the character "I". A red asterisk and the word "required" are to its right.
- Name:** A text input field with a red border. A red asterisk and the word "required" are to its right.
- Description:** A larger text input field with a red border. A red asterisk and the word "required" are to its right.
- Request Document Template:** A dropdown menu with "RFX" selected and a downward arrow.

At the bottom of the dialog are two buttons: "OK" and "Cancel".

The difference to other Project Template Types is that they will add a Stage based on the “Basic Tender” Template Type. Due to the nature of the differences of how certain tasks work in a Dynamic Open Framework, that is, create contracts at the end of each stage/round, every stage added to the template will be consistent.

Introduction of “Recycle” functionality in a Multiple Stage Dynamic Open Framework

As noted above, one of the primary principles in a Dynamic Open Framework is that Contracting Authorities must either re-award Suppliers awarded on the previous Stage/Framework or invite them to provide a new response in the current stage whilst opening-up applications to the framework.

To assist this process, a “Recycle” function has been introduced to Dynamic Open Framework-related Projects on the RFX Request.

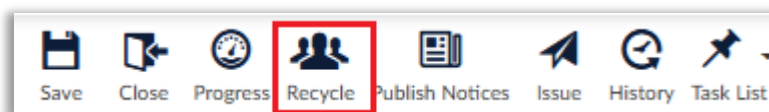
The functionality is configured for use in the Request Document Role Services for the appropriate Project Stage. It is only available where the RFX Status is “Not Issued”. As this functionality is designed to work using information from a previous stage, it does not require configuration for the 1st Stage of a Dynamic Open Framework Project as it has no previous RFX to work from. If it is configured for use on the 1st stage, the Toolbar button will be inactive.

IMPORTANT: The concept relies heavily on consistency of data between Stages. Where Multiple Lots are defined, they **must** match across each Stage RFX Request (see below for more details).

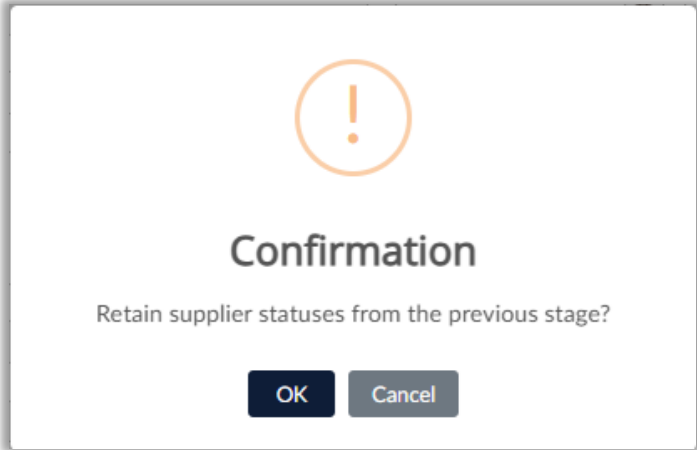
The Request Document Role Service window is displayed below, highlighting the Role Service to set to Full Access to enable. Notice the Document Status is “Not Issued”:

Role Service Name	Access
Messages Tab	Full Access
Notices Tab	Full Access
Preview Request Document	Full Access
Project/Stage	Full Access
Publish a Notice	Full Access
Questions Tab	Full Access
Recycle Suppliers	Full Access
Reference Fields Tab	Full Access
Request Buyer Name	No Access
Request Contact Email	Read Only

Once enabled, the Toolbar button will display as below on the appropriate RFX Request for the appropriate Users.



Selecting the “Recycle” Toolbar button will prompt with the following Window:

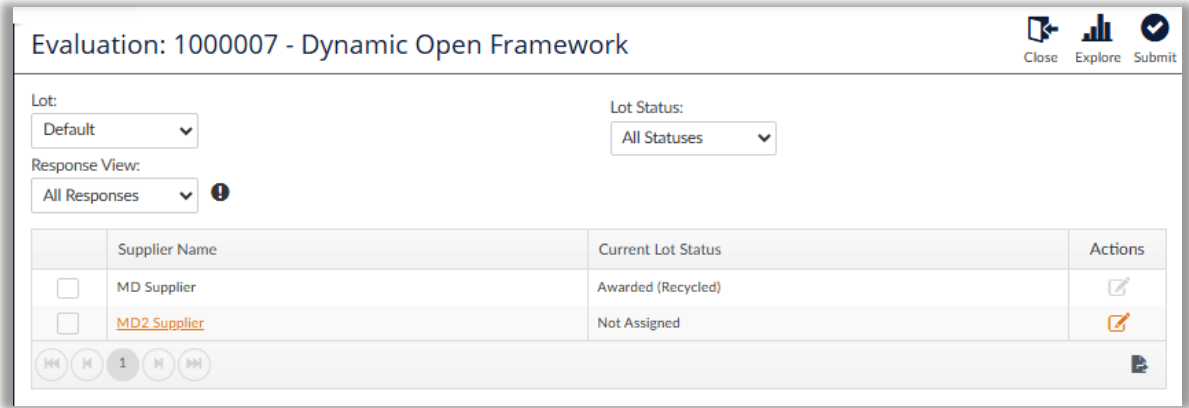


Clicking on “OK” will add Suppliers that have been Awarded on the previous Stage of the RFX to the current RFX Request with the Status of “Awarded” and will be automatically Awarded the Contract without having to respond to the RFX Request when the Award process is undertaken.

Clicking on “Cancel” will add the awarded Suppliers on the previous RFX Stage Request to the current RFX Request with the Status of Active, allowing them to be invited to respond along with any new applications from Suppliers registering interest in the Supplier Network Opportunity, or added to the RFX Request and invited to respond directly.

Enhancements to Evaluation

In Project Stages where the Recycle functionality has been used to re-award Suppliers from the previous Stage/Framework and as such the Supplier has been set with the Status of Awarded on the RFX Request, the Supplier will display in the list of Suppliers in the Evaluation Page. They will not require their Status to be set as it will have already been determined as Awarded.



As shown in the example screenshot above, where a Supplier has been re-awarded from the previous stage the Status displays here as “Awarded (Recycled)” and cannot be edited. As these Suppliers have not responded to this RFX Stage Request there is no Response to view, and so there is no hyperlink to open the information, and similarly, the Explore function will not display any information. The Response will have been provided in a previous stage.

NOTE: where a Re-Awarded Supplier was awarded multiple lots in the previous stage, and associated with Per Lot Contracts, these will persist in the current stage. This is one of the reasons that the Lot Configuration on an RFX Request must match that of the previous Stage of the Project to determine alignment of re-awarded Suppliers for the appropriate lot.



232009 - Central Digital Platform RFX Template and RFX Setting

Area: Sourcing

Availability: On Configuration

Description:

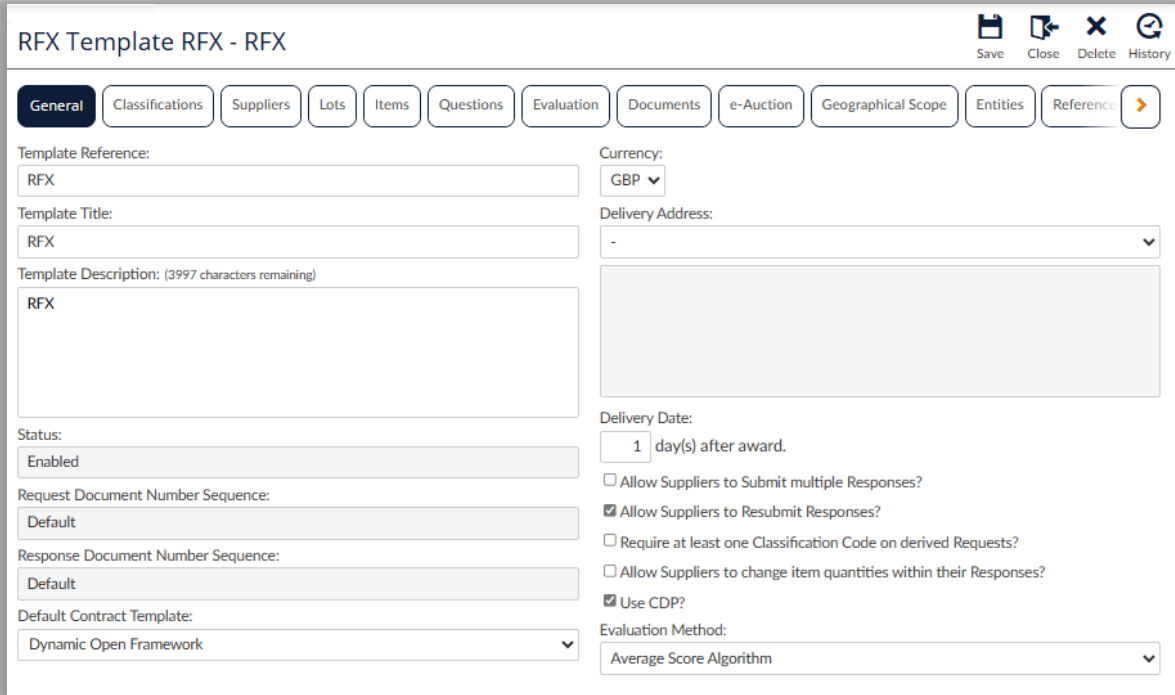
In readiness for the UK Central Digital Platform (CDP) in February 2025 a new configuration setting "Use CDP?" has been made available on RFX Request Templates, and RFX Requests. It is available to all RFX Request templates but is secured on the RFX Request by Request Document Role Services. As such, it will require configuration for use on RFX Requests. The setting, if enabled, will control how Suppliers respond to RFX Requests. The Role Service is displayed and highlighted below:

Role Service Name	Access
Use CDP	Full Access
View Request Document	Full Access
View Supplier Status	Read Only

The setting will be used to work with the integration with the UK Central Digital Platform once the requirements from the Cabinet Office have been finalised. An interim solution has been put into place that requires the Supplier to confirm that they have downloaded their Response from the CDP and uploaded to the Request in the Proactis Supplier Network. This was initially the Cabinet Office's process determined prior to the delay of the Procurement Act and CDP delivery until February 2025.

It is suggested that the function is not used until the Go Live of the CDP, but changes can be made to the configuration to ensure it is available when required on RFX Requests when ready to enable in line with the "CDP" Go Live.

The setting is shown below on the RFX Template. It is also positioned on the "General" Tab on the RFX Requests.



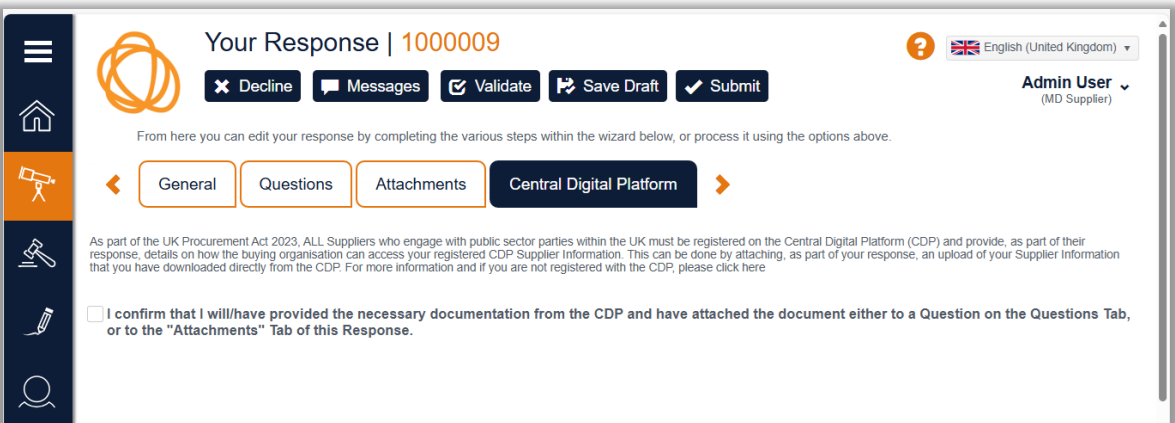
232708 - Update to Supplier Network for CDP-related Responses to Sourcing Requests

Area: Sourcing

Availability: On Configuration

Description:

In line with the previous “Use CDP?” setting being enabled on an RFX Request, the Supplier Network has an interim solution where a “Central Digital Platform” Tab will appear on the Request when the Supplier is responding through the Proactis Supplier Network, as shown below:



The Checkbox is mandatory, and the Supplier must tick the Checkbox to be able to submit their response.

As noted, this is an interim measure based on the Cabinet Office advice prior to the notification of a delayed Go Live of the CDP functionality until February 2025, and will be amended in due course in alignment with the rollout of the CDP.

In relation to this, a “CDP Supplier Disclaimer” Checkbox will display on the “General” Tab of the Supplier Response when viewed by a Buyer User. An example is shown below:

The screenshot shows a web application interface for an RFX response. The title bar reads "RFX Response 1000007 - MD Supplier". The interface includes a top navigation bar with icons for Save, Close, Submit, Supplier, History, and To Do. Below the title bar are four tabs: "General" (selected), "Items", "Questions", and "Attachments". The main content area is divided into two columns. The left column contains fields for "Response Reference:" (1000007), "Supplier:" (MD Supplier), "Date/Time Submitted:" (04/10/2024 12:56), "Status:" (Submitted), and "Notes from Supplier:" (a large empty text area). The right column contains fields for "Request Reference:" (1000005), "Buyer:" (DMD Org), "Document Management Number:" (empty), "Project/Stage:" (CDP/Basic), and "Closing Date/Time:" (04/10/2024 12:58). At the bottom right of the form, there are two checkboxes: "Allow multiple Responses?" (unchecked) and "CDP Supplier Disclaimer" (checked).



5.3 Defects

The following defects have been resolved within this update:

Area	Description
N/A	N/A