

Social Value Portal

User Guidance

1. Introduction

The Social Value Portal is an online tool for monitoring, measuring and managing the tendering and delivery of social value through contracts and other business related activities. The aim of this is to understand what value business brings to society, according to the principles of the Public Services (Social Value) Act 2012. The Social Value Portal has been set up to use a range of robust and transparent proxies chosen specifically for a project or organisations to allow the comparison of different bids as part of a tender or procurement, and to monitor the delivery of social value commitments made.

2. Requesting Login Credentials

Once you have been requested to enter your data on to the Social Value Portal you will need to obtain a username and password to login and gain access to the Portal and enter your data. To request access to a project, please visit either:

<https://socialvalueportal.com/supplier-registration/>

or

<https://socialvalueportal.force.com/SupplierRegistration>

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Request Access to a Project/Tender

Please enter your details here to request access to a specific project or tender on the Social Value Portal, in order to upload your Social Value targets for a specific project or contract.

Please ensure that you include the correct **Project Reference**, to ensure you are set up without delay.

Once your details are checked and approved, an account will be set up for you, and details will be sent shortly via the email address you provide. Please allow at least one working day to receive your login credentials, though in most cases it will be much quicker.

Reference number (please contact your contract/bid manager if you do not have one): *

Your Organisation - Name: *

Your Organisation - Post Code for Your Primary Location: *

Project Manager: First name: *

Project Manager: Last name: *

Project Manager: Email Address: *

You will be required to provide the following information:

- SVP Project Reference

*This will be a code in the form **SVPXXXX** to allow us to match you to the right project. If you do not have this, please ask the project/ tender/ contract manager.*

- Your Organisation - Name
- Your Organisation - Primary Location (post code)
- Your Name*
- Your Email*
- Your Telephone

**Please enter the details of the person who will be using the Social Value Portal. All correspondence will be sent through the email address entered here. You may find a copy of our Privacy Policy at <http://socialvalueportal.com/privacy-policy/>.*

Once you have submitted your request, it will be reviewed for approval by the Social Value Portal support team.

If you do not have login credentials, you will be sent an email containing your username and a link to set up your password.

If you already have login credentials, you will be sent an email confirming that you have been granted access to the project as requested.

Notes:

- *The password setup link will expire within 48 hours of being sent; if you need a new setup link, please email support@socialvalueportal.com.*
- *Your username will be in the form firstname.lastname@socialvalueportal.com.*
- *If you do not receive a password setup email please check your spam/junk mail folder*

3. Logging In

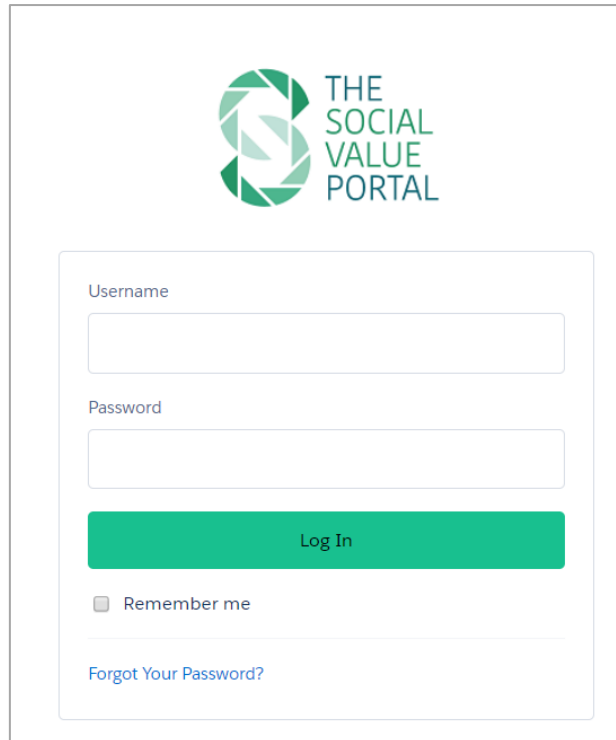
To log in to your account, please navigate to either:

<https://socialvalueportal.com/login>

or

<https://socialvalueportal.force.com/login>

You can find this link on the Social Value Portal website, in the menu under Login/Register.



THE
SOCIAL
VALUE
PORTAL

Username

Password

Log In

Remember me

[Forgot Your Password?](#)

To ensure the best view of the portal, please use a modern browser: older browsers may not display dashboards and reports correctly.

Notes:

- *Your username must be in the form firstname.lastname@socialvalueportal.com.*


3.1.1. Forgotten password

To request a password reset, please click on the 'Forgot Your Password' link on the login page, or go to: <https://socialvalueportal.force.com/secur/forgotpassword.jsp>

Alternatively, get in touch with the Social Value Portal team at support@socialvalueportal.com to request a password reset, and a new password setup email will be sent to your registered email address.


4. Start Page

Once you have logged in, you will arrive at the Start Page. This page shows the latest news and updates to the portal. New versions of this User Guidance document will be available to download on this page; please check back regularly to ensure you have the latest version.

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Welcome to the Social Value Portal!

[CLICK HERE TO START](#)



NEWS AND UPDATES
26/03/2018

To view Your Account, press **CLICK HERE TO START**.

5. Your Account

Your Account page displays all of the Projects¹ that you have been registered to (these may be from different client organisations), and allows you to download a copy of your project with summary details in excel/CSV format.

¹ All project types including bids, tenders, frameworks, contracts etc are included in the Project list

Bidder_A1 - Your Account
[Back to Home Page](#)

YOUR CONTRACTS/TENDERS

SVP Reference	Name	Contract/Tender/Project Owner	Type	Status	
Pr00066	Supply Chain Demo	SVP_SupplyChainDemo	Manage	Registered	CLICK TO VIEW
Pr00209	WishListDemo	SVP_Central	Bid	Registered	CLICK TO VIEW
Pr00076	TenderTest	SVP_Central	Manage	Registered	CLICK TO VIEW
Pr00003	Project_A1	SVP_ManageProject	Manage	Registered	CLICK TO VIEW
Pr00043	Manage_Example	SVP_ManageProject	Manage	Delivery	CLICK TO VIEW
Pr00042	Bid_Example	SVP_BidProject	Bid	Submitted	CLICK TO VIEW

EXPORT ACCOUNT DATA
 Download your project summary data below in CSV format.
[Account Summary Report](#)

Click 'Export Details' button on report page to download.
 In some versions of Excel, you may receive a warning that file has a different format than specified by the file extension. Please click 'Yes' to open the file.

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Do you have a question about how the Social Value Further guidance on completing your Social Value Are you a Follower, Mature, a Leader or an Innovator

5.1. Project List

The table displays:

- SVP Project reference (SVP XXXX or PrXXXX) – please quote this reference if you are contacting the Social Value Portal support team
- Name of the Contract/ Tender/ Project
- Contract/ Tender/ Project Owner
- Contract/ Tender/ Project Type:
 - **Bid:** setting commitments or target social value only
 - **Measure:** monitoring the delivery of social value only
 - **Manage:** setting commitments and monitoring delivery against targets
- Status of your Social Value response:
 - **Registered:** Account registered – no targets submitted, not monitoring delivery
 - **Submitted:** Targets/commitments submitted
 - **Delivery:** Monitoring delivery

To select one of your Projects and enter or edit your Social Value responses, please click on the project Name.

5.2. Download Account Summary

Click on the button marked *Download Account Summary Report in Excel Format*. This will start downloading immediately, and will give a summary of all of the projects that you have been registered to on the Social Value Portal.

The data includes:

- SVP Project Reference
- Name
- Project Owner

- Project Type
- Contract Value
- Target Social Value (£)
- Target % SVA (Target Social Value / Contract Value)
- Actual Social Value (£)
- Actual % SVA (Actual Social Value / Contract Value)
- Progress % SVA
- Submission Status
- Current Period End Date (i.e. date of next submission, where applicable)

Notes:

- You may receive the following warning when opening the excel file: *'The file format and extension of [your filename.xls] don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?'* If you receive this message, please press 'Yes'. The message is triggered when the .htm file generated by the Social Value Portal is being opened as .xls, and is not a cause for concern.

6. Your Social Value Record

The Social Value record allows you to enter and edit your Target and Actual Social Values, and upload evidence supporting your responses.

6.1. Enter Your Responses

Use the *'Social Value Tender Responses'/'Social Value Contract Responses'* section to open the Social Value questionnaire. This will allow you to enter your responses and short descriptions to each question (see Section 6.1). You view or export a list of the questions that you are being asked to respond to by using the 'Web', 'PDF' or 'Excel' buttons, to open the questions in your browser, download as a PDF document, or download as an excel spreadsheet respectively.

Press the *'Social Value Questionnaire - Enter Social Value Targets'* button to open the Social Value Questionnaire page. This contains all of the questions relating to your Project, organised by Theme. Each question includes a measure, the Social Value associated with each measure, and provides a link to supporting information. Mandatory questions will be marked **MANDATORY**.

For each question please enter your response, ensuring that you read the question carefully and understand the units of the response required. There is also a space to enter a short description of how you intend to fulfil this, for example based on previous experience or a project plan.

If more than one Project period has been defined, multiple fields will be displayed, indicating the close date for each period. According to the Project options set by the contract or procurement manager, you will either be able to respond to all periods, or just the period with you are currently in – at the end of each period, your responses will be locked before the new field opens for editing.

Where a Social Value proxy has been linked to a measure, the calculation and resulting social value add is shown.

You can recalculate your Target Social Value at any time by pressing *'Save and Calculate'*. The updated Social Value will appear at the top of the page. When you have finished editing your Answers, recalculate the Social Value, and press *'Save and Close'* to go back to the Social Value record.

Pressing *'Close'* will return you to the Social Value record page without saving your changes.

Pressing *'Print Page'* will open your browser print dialogue.

If you wish to upload longer responses or any further supporting documentation or evidence, you may upload this as an attachment. Clicking on the *'Attach a File'* button will open a pop-up window: Follow the instructions to upload your attachment. You may also upload attachments, as well as view the full list of attachments uploaded, on the main Social Value Record page.

Notes:

- Your session will timeout after 2 hours of inactivity. Please ensure that you press *'Save and Calculate'* regularly to avoid losing any data. A popup will display after 30 minutes without saving to remind you to save your data.

6.2. Enter Contract Value

If it has been requested, please enter your *Contract Value/Bid Price* and press *'Save'*. This refers to the value of the contract/procurement/project about which you are responding. If your project contains multiple items on a framework, please include the sum of each item.

If you have questions regarding how to fill in this field, please contact the procurement or contract manager for the project.

6.3. Reviewing and/or Submitting your Responses

6.3.1. Bid/Procurement projects

For Bid/Procurement Projects, where you are submitting social value targets or commitments, you should press the *Confirm Submission* button once you are happy with your responses, to indicate that the responses are ready for submission. This will lock the targets and convert the questionnaire to Read Only. Up until the target deadline, you will be able to edit your responses by clicking *Edit Responses*. Please ensure that you re-confirm your submission once you have finished editing.

You must submit your Social Value Responses before the submission date. In most cases for Bids/Procurements, this will be set to the same date and time as the deadline for the procurement as a whole - please check with your procurement manager.

6.3.2. Measurement projects

For Measurement or Contract Management projects where you are entering actual information, the Social Value Record page will indicate which periods have data entered.

6.4. Print PDF report for download

If you would like to create a pdf report showing your Social Values against each question, use the *'Print Social Values to PDF'* button. A report will be generated, and will be stored in the *'Evidence and Reports'* section. To open the report in your browser, press *'View'*.

6.5. Changing the Primary Contact

By default, the will be set as the email address used when registering on to a project. However, you may change this email address if you would like any further notifications to be sent to a different email address, or delete it if you do not wish to receive any notifications. This email address may be different for each separate project that you have access to.

The email address listed in the Primary Contact field will only be used for notifications or reminders for the Social Value record in question, and will not be visible to the Project Owner account.

Email notifications sent to this account will be limited to the following:

- Notification on the creation of a Social Value Record for a Project
- 2 week reminder prior to all key project dates
- 1 week reminder prior to all key project dates
- 1 day reminder prior to all key project dates
- Reminders from the Project Owner

7. Account Deactivation/Reactivation

The free user license that you have received to enter your social value responses is linked to a specific project or projects. After the project has concluded (e.g. at the end of a tender, or following the completion of a contract), your data will be archived and your account will be deactivated.

Data submitted to the Social Value Portal will be available on request.

If your organisation is required to complete further social value assessments through the Social Value Portal, previous contract/ tenders/ projects will be visible.

8. Upgrading your Account

The free Social Value Portal User Account that you receive when you are requested to register on behalf of another organisation allows you to upload data on your contracts/ tenders/ projects. You will be able to see the measures that have been set by your client organisations to monitor and manage the Social Value delivery.

8.1. Benefits of membership

We offer a range of services and solutions that may be of interest to you as you move forward with developing your approach to measuring and reporting social value. Our services are broken down as follows

1. Project Development including planning, procurement and reporting.
2. Community Projects including both development and non-development specific initiatives
3. Corporate reporting which will include the overall Social Value Impact from all activities across your business

Please get in touch with info@socialvalueportal.com to discuss upgrading your membership

9. Help/Support

For questions regarding your project such as clarifications, key dates and deadlines, please get in touch with your procurement or contract manager.

For technical issues or queries specifically relating to the use of the Social Value Portal, you may get in touch with us in the following ways:

- Email: support@socialvalueportal.com
- Use the online contact form – find the link at the bottom of each page, or go to: https://socialvalueportal.force.com/VF_Help.

The Social Value Portal support team will get back to you as quickly as possible to respond to your query; please allow up to one working day for a response.