

# **ProContract V3 Supplier Guide**

## **Registering & Getting Started**

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# Registering

To take part in any exercise and to be able to express an interest in a contract opportunity, first you **must register** on ProContract with details of yourself and also the company that you work for. This process is covered, in detail, in the following sections, with explanations of all the key actions required.

## How to Register

On the portal home page there is a link to **Register** (for free) on the right hand side of the screen (as shown below).

Click the link to begin the step-by-step registration wizard, where you will be required to enter your company details.

Home page

The screenshot shows the ProContract portal home page. On the left, there's a 'News and announcements' section with two items: 'Tories plan 'extreme cuts' - Labour' and 'Cameron pledges 500 new free schools'. Below that is a 'Current opportunities' section listing one item: 'Cheshire (a) Accommodation for Service User(s)' with a start date of 05/02/2015 and an estimated value of £5,000,000.00. On the right, there's a 'New to portal' section with a 'List of benefits' (Gain real time feedback on the competitiveness of your bid, Reduce the time required to win business, Bid in your own local currencies, Automatically calculate landing costs), a 'Free registration' button, and links for 'Register' and 'Login'. Below that is a 'Useful links' section with a 'Contracts register' link.

## Requirements

This page is an introduction to the process that you will be taken through in order to complete your registration on the portal. Please read the text carefully before proceeding through this process.

**Minimum and recommended system requirements** can also be viewed here. If you wish to proceed, click **Continue** from the options at the bottom of the page, or if you want to abort the registration process click **Cancel**.

Register

The screenshot shows the first step of the registration wizard, titled 'Requirements'. It includes a navigation bar with steps 1-7: Requirements, Contact info, Company info, Description, Opportunities, T&Cs, and Confirmation. The main content area contains text about the wizard's purpose and a link to 'Minimum and recommended system requirements'. At the bottom are 'Continue' and 'Cancel' buttons.

## Contact Information

At this stage of the registration process you need to enter your own contact details, a username, a password, and a memorable word/hint. These details will be used when logging into the system. You will be the primary account holder for this company (although details can be changed post registration) so this account holder will be able to modify the details for the company and add more accounts (which is detailed in another guide).

Register

The screenshot shows a registration form titled 'Register'. At the top, there is a navigation bar with seven steps: Requirements (marked with a checkmark), Contact info (highlighted in blue), Company info, Description, Opportunities, T&Cs, and Confirmation. Below the navigation bar, a message states: 'We require all this information to create your account unless marked as optional.' The form contains four input fields: 'Title' (empty), 'First name' (empty), 'Last name' (empty), 'Job title' (empty), and 'Department' (empty). A question mark icon is located next to the 'Department' field.

### Contact Information

In this section your contact information is entered along with your job details. Complete all mandatory fields.

**Note:** Further help regarding the fields can be found in the by hovering over the icon.

**Department** - This will form your work group. All future members of this work group will be able to access events you are involved in.

**E-mail** - This is the e-mail address that messages will be sent to confirming registration details, and all other system communication that may take place during the tender process (including notifications of new tender opportunities). It is recommended in most instances that a **GENERIC EMAIL ADDRESS** is used, so that communication will not be lost if that person is away or leaves their position (i.e.to a sales@... or tenders@... address possible.) Also this must be of standard email format e.g. name@company.com.

### Security Information

The second part of this stage is dedicated to setting up your security information. This is where you are asked to specify a password, a memorable word and a hint to help you in case you forget it. This must be something that is secure and also that is **memorable** to you.

When the details have been completed then please click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

## Company Information

In this section you will need to populate details regarding the company you work for/are registering on behalf of, as shown below.

We require all this information to create your account unless marked as optional.

Company name

Address

Town

County

-- Please select --

Postal code / zip

Country

-- Please select --

Website (optional)

http://www.example.com

Continue Back Cancel

You are required to enter the name of the company you work for and location details.

If any of the fields do not apply but are mandatory, such as "Postcode/ZIP" for companies based outside of the United Kingdom, by entering "N/A" here you can still proceed.

**Note:** Some of the fields (County and Country) are chosen by using a dropdown menu. To select a County/State click the arrow to the right of the box to reveal a drop down menu containing all the possibilities that can be chosen

From the list select the required option by clicking on its name and this will populate the field as required.

County

Northumberland ▾

If United Kingdom is selected, then fields will appear requiring Registration number and VAT number.

When the details are complete then please click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

## Description

The first part of this stage requires a Company description and up to 6 keywords. Here more information on the company is entered to help the contracting organisation understand what it is your company does. The description helps promote your company to potential buyers, while the keywords can improve the 'searchability' of your company.

**Note:** A description and at least one keyword are required in this section. This is free text and as much information as required can be entered here.

It is important that you complete this information as the procuring organisations can search for a company based on the description or keywords specified.

We require all this information to create your account unless marked as optional.

Company description  
Promote your company to potential buyers.

E-Sourcing / Procurement software providers

Company keywords  
Improve your company's searchability by entering a number of keywords.

1. SaaS

2.

3.

4.

## Number of Employees/Classifications

Enter your best estimate as to the number of employees in your organisation within the *Number of employees* field.

### Number of employees

*Please provide your best estimate as to the number of employees in your organisation*

The final section is the *Classifications* section. This is where the supplier can highlight the classifications that the company belongs to (which is used for reporting purposes only). To select a classification hover over the relevant box and left click on the mouse to mark the box to the left with a tick. You can highlight as many that apply to your organisation.

**Note:** The first batch of classifications are mandatory and at least one must be selected from the list.

### **Classifications**

*Please check all that apply. This information is used for reporting purposes only.*

Legal Status of Organisation

- Charitable Incorporated Organisation (CIO)
- Community Interest Company (CIC)
- General Partnership
- Industrial & Provident Society
- Limited Liability Partnership (LLP)
- Limited Partnership
- Private Company Limited by Guarantee (LTD)
- Private Limited Company (LTD)
- Public Limited Company (PLC)
- Sole Trader
- Unlimited Company
- Other

**Note:** The second batch of classifications are optional, and are selected in the same way as described above.

Further Organisation Detail (optional)

- Public sector organisation
- Charity
- Black and Minority Ethnic (BME) organisation
- A company owned and managed by women
- Social Enterprise (SE)
- Franchise
- Voluntary Community Sector (VCS)

When the details are complete then click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

## Opportunities - Category/Region Selection

This is the category and region selection stage of the supplier registration, which will look as shown below.

To select your chosen categories click the **Select Categories** button.

Categories  
Have opportunities in the following categories emailed to you.

**Select categories**

### Categories List

This section is where you can register your company to receive automatic e-mail notifications of new opportunities that have been published that may be of interest to your company. This will greatly assist you when using the portal and means that relevant opportunities are not missed. At least one category must be selected.

#### Category selection

Search categories

Enter the search criteria... **Search**  Exact match  Fuzzy search

Categories list

- 01000000 - Food
- 02000000 - Supply Chain
- 03000000 - Supplies and Services
- 04000000 - Drink

**Category:** The top level categories that you can register to receive updates under are all listed.

To select a top level category, mark the box to the left of the category by clicking it. You can select multiple categories if required. Ensure that you click on **Select Categories** to add this to the list.

If you are not sure, or if you want to put your company against lower level classifications, you may use the search facility at the top of the page to search for specific words to help you narrow down the categories to add to your account.

This can also be done by clicking on the blue diamond to the left of the category which will take you down to the next level. This can then be repeated to go down further levels in some categories.

**Note:** When selecting categories, only categories relevant to the goods or services you can offer as a supplier should be selected. Category selection can be revisited at anytime to

carry out required amendments, and searches of advertised opportunities for all categories can also be carried out at anytime.

Search categories

Search  Exact match  Fuzzy search

Categories list

- +  01000000 - Food
- +  02000000 - Supply Chain
- +  02010000 - Waste
- +  02020000 - Energy
  - 02020100 - Utilities
  - 02020200 - Equipment

When all required categories have been chosen, click **Select Categories** from the options at the bottom of the page.

Requirements Contact info Company info 4 Description 5 Opportunities 6 T&Cs 7 Confirmation

Please correct the 2 errors on the form to continue

We require all this information to create your account unless marked as optional.

Categories  
Have opportunities in the following categories emailed to you.  
02020200 - Equipment

✖ Please select at least one category.

**Select categories**

Selected categories are now shown as above.

**Note:** If a category has been added in error this can be removed by clicking the ✖ button.

## Regions

At least one *Region* must now be selected. These will limit the opportunities that you are emailed to only regions that you supply to. Regions are selected in the same way as categories.

The screenshot shows a 'Region selection' interface. On the left, a sidebar has 'Register' at the top, followed by 'Requirements' (with a dropdown arrow), 'We require all these', 'Categories' (with 'Have opportunities'), '02020200 - Equipment', 'Select categories', 'Regions' (with 'Limit opportunities'), 'Select regions', 'Continue', and 'Back'. The main area has a 'Search regions' section with a search bar containing 'Enter the search criteria...', a 'Search' button, and radio buttons for 'Exact match' and 'Fuzzy search'. Below is a 'Regions list' section with a tree view of regions under 'UK - UNITED KINGDOM': UKC - NORTH EAST (ENGLAND) is expanded, showing UKC1 - Tees Valley and Durham and UKC2 - Northumberland and Tyne and Wear (which is checked). Other collapsed regions include UKD - NORTH WEST (ENGLAND), UKE - YORKSHIRE AND THE HUMBER, UKF - EAST MIDLANDS (ENGLAND), and UKG - WEST MIDLANDS (ENGLAND). At the bottom is a 'Selected regions' section containing 'UKC2 - Northumberland and Tyne and Wear' with a remove button (an 'X'). At the very bottom are buttons for 'Select regions', 'Remove all', and 'Cancel'.

## Additional Classifications/Categories

Also further lists/categories may now also be found (if the procuring organisation/portal have used these) This allows you to register against further supplier lists, as set up by the procuring organisation(s) to allow you to be further categorised and found more easily by procurers.

**Note:** This is totally independent of the Contract Category Interest that is chosen and this will NOT generate any email notifications.

Each list will show up with the title, followed by a classification structure, which you can register your company against. Tick the options that are applicable from this list, this may be done for several lists.

When the details are complete then please click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

## T&C's and Privacy Policy

This is the step where you will be asked to agree to the Terms and Conditions of using the system, and also the privacy policy as laid out by Due North.

Register

Due north terms and conditions

Due North Limited

Terms and Conditions of use

Acceptance of Terms

The Website may provide communication tools such as email, bulletin boards, chat areas, news groups, classifieds, forums and/or other message or communication facilities ("the Services") designed to enable you to communicate with others. Unless stated otherwise the Services are for your personal and organisation's use only. Your access to and use of [www.nepoportal.org](http://www.nepoportal.org) ("the Website") and the Services outlined, are subject exclusively to these Terms and Conditions.

You will not use the Website/Services for any purpose that is unlawful or prohibited by these Terms and Conditions. By using the Website/Services you are fully accepting the terms, conditions and disclaimers contained in this notice. If you do not accept these Terms and Conditions you must immediately stop using the Website/Services.

Due North Limited reserves the right to update or amend these Terms and Conditions at any time and your continued use of the Website/Services following any changes shall be deemed to be your acceptance of such change. It is therefore your responsibility to check the Terms and Conditions regularly for any changes.

International Use

You agree to comply with all applicable laws regarding the transmission of technical data exported from the United Kingdom or the country in which you reside

Privacy policy

Due North Limited

This document should be read in conjunction with the Terms and Conditions shown on this site.

Privacy

Due North Limited shall comply with all applicable UK data protection legislation in place in respect of any personal information relating to you or information pertaining to your company.

Due North Limited will not supply customer or personal information held on this site to other parties who could use it for commercial purposes.

You must agree to all conditions to continue

**Continue** **Back** **Cancel**

To agree with Due North Ltd's Terms and Conditions and Privacy Policy tick the box placed at the bottom of the page.

When the box is ticked click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

## Confirmation Page

The final screen will be a summary of the details that have already been entered into the system, that need to be checked before completion of registration.

If you are unhappy or would like to change any of the information in the sections then this can be done by clicking on the **relevant stage title** along the top of the page.

### Register

Requirements	Contact info	Company info	Description	Opportunities	T&Cs	7 Confirmation
Name	Mr Chris Cox					
Job title	Support					
Department	Support					
Telephone	01670597120					
Fax						
Mobile						
User name	chris.cox					
Email	chris.cox@due-north.com					
Company name	Cox & Clifton					
Address	1 DN Support, Support Town, Northumberland, NE23 1LZ United Kingdom					
URL						
Registration number	123456					
VAT number	VAT1234					
Company description	Support					
Keywords	Support					
Number of employees	10					
Legal Status of Organisation	Private Limited Company (LTD)					
Further Organisation Detail						
Categories	02020200 - Equipment					
Regions	UKC2 - Northumberland and Tyne and Wear					
Public lists						

## Submitting your Registration

Once you are happy that all details are complete and correct the Registration needs to be submitted.

Regions	UKC2 - Northumberland and Tyne and Wear
Public lists	
<b>Submit registration</b>	<a href="#">Back</a> <a href="#">Cancel</a>

When you are happy that all the information is complete and correct, click **Submit Registration** at the bottom of the screen. Click the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

This will show the Supplier Registration Confirmation page as shown below.

## Thank You

Thank you for registering your details. Your registration will be assessed and you will be notified of the outcome in due course.

[Continue](#)

The system will then send a confirmation e-mail to say the application is being considered. The email will also contain an application reference number for your own records.

Click **Continue** to return to the supplier portal.

When the registration is accepted then you will receive an email containing a reminder of your username and the link to access the opportunity portal.

# Getting Started

## System Requirements

### PC - Minimum computer specifications

	Minimum	Recommended
Processor	Intel/AMD 200Mhz	Intel/AMD 1Ghz
Operating system	Windows 98 and above / Linux	Windows XP and above / Linux
Memory	32 MB	1 GB
Internet browser	Internet Explorer (Version 9) Google Chrome (Latest)	Internet Explorer (Version 9) Google Chrome (Latest)
Screen display	800x600 256 colours	1024x768 32-bit colour
Internet connection*	56K Dialup	512k Broadband

### Apple Mac - Minimum computer specification

	Minimum	Recommended
Processor	Power PC 300Mhz	Intel/Power PC 1Ghz
Operating system	Mac OS 9.0+	Mac OSX
Memory	32 MB	1 GB
Internet browser	Internet Explorer (Version 9) Google Chrome (Latest)	Internet Explorer (Version 9) Google Chrome (Latest)
Screen display	800x600 256 colours	1024x768 32-bit colour
Internet connection*	56K Dialup	512k Broadband

\* Performance of uploads/downloads is directly related to the bandwidth/usage of your internet connection. It may also be affected by the configuration of your computer/internet browser. The bandwidth available at our data centre supports the highest connection speeds available, so you should always get the best performance that your configuration provides.

## Logging into ProContract Version 3

When visiting the opportunities portal the screen will look similar to that shown below. Here, click on the **login** icon on the right hand side of the screen to log into the system.



Home page

The 'New to portal' section contains a 'List of benefits' with the following items:

- Gain real time feedback on the competitiveness of your bid
- Reduce the time required to win business
- Bid in your own local currencies
- Automatically calculate landing costs

Below this is a 'Free registration' section with 'Register' and 'Login' buttons, and a link for 'Forgotten your username or password?'. There is also a 'Useful links' section with a 'Contracts register' link.

This will then change to the portal login screen where user name and password need to be entered.

### Log In

#### User Name

Supplier1

#### Password

.....

[Forgotten your username or password?](#)

**Continue**

**User Name:** In this field you enter your username that you set within your application for the portal. Click into the text box and type your name, which may contain both text and numbers.

**Password:** In this field you enter your password that you set within your application for the portal. Again, click into the box and type your password. This is **Case Sensitive**. Once this has been done click on the **Continue** button.

If you have forgotten any of the above information, there are links to click to reset the security details.

## Portal Homepage

You are now taken to the supplier home page.

The screenshot shows the homepage of a portal with a blue header bar. The header includes links for 'Home', 'Find opportunities', 'My activities', and user information for 'Chris Cox'. There is also a 'Logout' link. Below the header is a search bar with a dropdown for 'All opportunities' and a green 'Go' button.

The main content area is divided into several sections:

- News and announcements:** Shows two items:
  - Tories plan 'extreme cuts' - Labour**: Labour accuses the Conservatives of planning "extreme" public spending cuts of £70bn after the election, while the Tories say Labour would cause "chaos".  
[More](#)
  - Cameron pledges 500 new free schools**: The number of free schools in England will more than double to over 900 by 2020, if the Conservatives are re-elected, David Cameron is to say.  
[More](#)
- Company details summary:** Shows company information for 'Cox & Clifton':

1 DN Support, Support Town, Northumberland, NE23 1LZ

**Description:** Support

**Keywords:** Support
- Activities:** Shows tabs for 'Active activities', 'Archived activities', and 'Last viewed activities'. A search bar allows filtering by 'All buyers' or 'Search' with a 'Go' button. The message 'Your criteria returned no results' is displayed.
- Workgroups:** Shows a list of workgroups: 'Support (1)'. A green 'Add new workgroup' button is available.
- Opportunities:** Shows a list of suggested opportunities based on profile categories and regions. A green 'Suggested Opportunities' button is available. The message 'No matching records found' is displayed.

**Logout** can be clicked at any time to log out of the portal when you are finished. You can also access and make changes to **Your Account** here too.

The **Activities** area will show any Active, Archived or Last Viewed Activities you are currently included in.

The **Opportunities** area will show any suggested opportunities based on the categories and regions selected in your profile.

**Company details** and **Workgroups** can also be viewed/amended.

# Opportunities

## Contract Opportunities

Contract opportunities are posted by buying organisations to notify you of their up and coming contracts and to give suppliers a chance to express their interest in the opportunity and to receive the relevant documents.

## Contract Opportunities

Contract Opportunities are posted by buying organisations to notify you of their up and coming contracts and to give suppliers a chance to express their interest in the opportunity and to receive the relevant documents.

The opportunities area will also show a list of **suggested opportunities**, based on the Categories and Regions selected in your profile.

The screenshot displays the Opportunities section of a supplier home page. It includes:

- Activities:** A summary box showing a promise from David Cameron regarding job creation. It includes tabs for Active activities, Archived activities, and Last viewed activities, along with search and filter options.
- Workgroups:** A section explaining how activities are assigned to workgroups, showing one group named "Support".
- Opportunities:** A section titled "Suggested Opportunities" which shows no matching records found.

## Searching Opportunities

To search for new opportunities from the supplier home page click on **Find Opportunities** located across the top of the page.

The screenshot shows the top navigation bar of the supplier home page, featuring links for Home, Find opportunities, My activities, and a user account dropdown. The "Find opportunities" link is highlighted.

This will then open the Opportunities screen which includes a full list of all current opportunities. You can specify search criteria to **narrow your results** in the left hand panel, or just do a key word search (on Title, Buyer or All Data) within the **Search** area in the top right of the page.

The screenshot shows the 'Find Opportunities' search interface. On the left, a sidebar titled 'Narrow your results' contains dropdown menus for Portals (All, North West Portal), Categories (0 selected, Add new category), Regions (0 selected, Add new region), Include Closed (Yes selected), and Interest Date (Start date dd/mm/yyyy, End date dd/mm/yyyy). A green 'Update' button is at the bottom. On the right, a table titled 'Opportunities' lists one result: '(a) Accommodation for Service User(s)' by Cheshire, dated 05/02/2015 to 04/02/2019, with an estimated value of £5,000,000.00. The table has columns for Title, Buyer, Expression Start, Expression End, and Estimated Value. A 'Search' input field and a 'Go' button are at the top right of the main area.

### **Narrow your results on:**

**Portals:** This setting allows the Portal you are searching on to be chosen.

**Categories:** This field allows you to choose the category classification to which the opportunities you wish to search for are associated. To select a category, click on the *Add new category* and search for the relevant entry.

**Regions:** This field allows you to choose the region to which the opportunities you wish to search for are associated. To select a region, click on the *Add new region* and search for the relevant entry.

**Include Closed:** This defaults to No which will show only opportunities that you can currently express your interest in - so the expression of interest window is open. To view all current opportunities, and also all past and future opportunities that are on the portal but have closed, mark Yes.

**Interest Date:** Refine your results based on the Expression of Interest date.

Once the search has been set up in the desired way then click on Update and the opportunity results in the middle of the page will refresh.

To view the further details of the opportunity, click the corresponding **title**.

Opportunities				
Title	Buyer	Expression Start	Expression End	Estimated Value
<a href="#">(a) Accommodation for Service User(s)</a>	Cheshire	05/02/2015	04/02/2019	£5,000,000.00

The opportunity details will look as shown, with all the relevant opportunity/contract details.

[Home](#) > [Find opportunities](#) > (a) Accommodation for Service User(s)

## (a) Accommodation for Service User(s)

[Return to find opportunities](#)

Main contract details	Contact details
<p><b>Title</b> (a) Accommodation for Service User(s)</p> <p><b>Categories</b> 03000000 - Supplies and Services</p> <p><b>Description</b> This is for the provision of Accommodation for Service User(s) coming via our Care Brokerage team. We are running this exercise as an Open DPS Framework. This means that as a potential provider you can apply to be added to this framework at anytime throughout it's 4 year duration. If you don't succeed with your first attempt you can try again at a latter stage. Please also find attached a contract overview and a summary of how the DPS works and the advantages for you as the provider.</p>	<p><b>Buyer</b> Cheshire  <b>Contact</b> Buyer One  <b>Email</b> <a href="mailto:buyer1@example.com">buyer1@example.com</a>  <b>Telephone</b> 56446565  <b>Fax</b> 654546546  <b>Address</b> Enterprise Court  Cramlington  Northumberland  NE23 1LZ  United Kingdom</p>
Key dates	Attachments
<p><b>Estimated contract dates</b></p> <p><b>Start date</b> 30/01/2015      <b>End date</b> 30/01/2016</p> <p><b>Expression of interest dates</b></p> <p><b>Start date</b> 05/02/2015 08:00:00      <b>End date</b> 04/02/2019 08:39:00</p> <p><b>Current Dynamic Purchasing System (DPS) round information</b></p> <p><b>End date</b> 30/01/2016 00:00:00</p>	<p>Public attachments can be viewed by all procurers and suppliers involved in this project</p> <p>No attachments</p>

## Main Contract Details

This shows key details of the contract including the title, categories and description.

### Key Dates

This section shows the estimated contract dates, the expression of interest dates and any other important information (i.e. Current DPS Round end date, for example.) The expression of interest dates determine the options that will be available regarding the opportunity, as the date must fall within these two dates in order to express an interest.

### Contact Details

This shows details of the Buyer and Main Contact.

### Attachments

Any attachments or links relevant will appear in the bottom right, where they can be viewed/downloaded by clicking on the title.

In the top right there are 2 options – either register an interest in the opportunity, or return to the find opportunities page.

## Registering Interest in an Opportunity

To register interest in a particular opportunity you must be registered on the portal. See the section [Registering](#)

Once registered, you will have a username and password to access the portal. This allows you to register interest in any opportunities that are advertised on the portal.

Once you are logged in, you can find the relevant opportunity using the process in the section [Contract Opportunities](#).

If after viewing the information regarding the opportunity you decide that you are no longer interested in registering an interest then click the *Return to find opportunities* button. If you do decide you would like to express your interest then click on **Register interest in this opportunity**.

[Return to find opportunities](#)

Service User(s) running this exercise	<p style="text-align: center;"><a href="#">Register interest in this opportunity</a></p> <p><b>Contact details</b></p> <table border="1"><tr><td><b>Buyer</b> Cheshire</td></tr><tr><td><b>Contact</b> Buyer One</td></tr></table>	<b>Buyer</b> Cheshire	<b>Contact</b> Buyer One
<b>Buyer</b> Cheshire			
<b>Contact</b> Buyer One			

The same area will now show **confirmation** of the registered Expression of Interest. Click [\*\*Return to find opportunities\*\*](#) to start a New Search.

[Return to find opportunities](#)

Service User(s) running this exercise	<p style="text-align: center;"><b>Expression of interest registered</b></p> <table border="1"><tr><td><b>Date</b> 09/03/2015 16:25:33</td></tr><tr><td><b>Workgroup</b> Support</td></tr></table>	<b>Date</b> 09/03/2015 16:25:33	<b>Workgroup</b> Support
<b>Date</b> 09/03/2015 16:25:33			
<b>Workgroup</b> Support			

# Responding to Tenders

When an RFQ/PQQ//Tender is published an e-mail will be sent by the system to inform you of this, and that the exercise can now be viewed and worked on. The following section of the user guide will take you through the RFQ/PQQ/Tender response process.

**Note:** While this guide covers the attachment of an ITT response, it remains the same for the return of a PQQ or RFQ, it is just the specific wording that will change.

## **Viewing the Details/Documents**

Login to the system and then it will take you to your homepage.

The screenshot shows the system's homepage with the following sections:

- News and announcements:** Includes two items:
  - UK surveillance 'lacks transparency'**: A news item about the legal framework surrounding surveillance by MI5, MI6 and GCHQ.
  - Farage: I'd axe 'much of' race laws**: A news item about Nigel Farage's comments regarding race laws.
- Company details summary:** Shows the company "Cox & Clifton" located at "1 DN Support, Support Town, Northumberland, NE23 1LZ". It includes sections for **Description** (Support) and **Keywords** (Support).
- Activities:** Shows a list of active activities. One activity is listed:

Buyer	Title	Current event	Event deadline
Cheshire	<a href="#">Example Project</a>	Example ITT	22/04/2015
Cheshire	<a href="#">(a) Accommodation for Service User(s)</a>	(a) Accommodation for Service Users	28/01/2016
- Workgroups:** Shows a list of workgroups. One workgroup is listed: "Support (1)". There is also a button to "Add new workgroup".

From here to view your current activities that you are working on, from the **Activities** section click on the title of the Activity you wish to work on.

The **Activities** area shows all the various tenders that you have registered with, this can be an ITT (Invitation to Tender), RFQ (Request for Quotation), a PQQ (Pre-Qualification Questionnaire) etc.

**Note:** The process is the same in the system for all types of tender opportunity, PQQ, ITT and RFQ's, etc. however, in this case the ITT has been chosen to look through, and ITT will be referred to at various points. If you are completing a PQQ or Quotation (using attachments) then the screens will remain the same, it is only the terminology that will change. Online responses to online evaluations are covered in a separate guide/help section.

As you can see above, the Buyer, Title of the project, current event and event deadline is shown. In this case it shows a  symbol to reflect it is new and it has not yet been viewed or worked upon yet.

By clicking on the title in blue, further information is now shown. From this screen all aspects of this project can be dealt with; the tender can be viewed, questions can be asked and answers received, additional information can be issued and your response can be put together and sent to the contracting organisation. Each stage of the procurement process will be seen as its own section.

To view the relevant stage of the project click **Open Event** within the relevant stage, in this instance 'Example ITT'.

[Home](#) > Example Project

---

Activity : Example Project [< Back to home page](#)

**Events**

<a href="#">Example ITT</a>	In Progress	<a href="#">Hide details</a>   <a href="#">Open event</a>
<b>Reference:</b> 41 <b>End date:</b> 22/04/2015	<b>Start date:</b> 24/03/2015	<b>Event status:</b> In Progress

[Archive this activity](#)

**Messaging**

You have 0 unread message(s).  
[View messages](#)

**Audit history**

[View audit history](#)

This will open the tender screen. This is broken up into different sections; Main details, Public attachments, Terms & Conditions, Item breakdown and Messaging. **Note:** There is also a **countdown timer** in the top right indicating the time left until the submission deadline.

**Cheshire - ITT**

41

**Main details**

**Title:** Example ITT **Respond by:** 03/14/2015 21:30:00

**Description:** Example ITT

**Public attachments**

Public attachments can be viewed by all procurers and suppliers involved in this rfx

<a href="#">IT Attachment.docx</a>	12 KB
<a href="#">Specification &amp; Requirements Document.docx</a>	12 KB

**Terms & conditions**

[Standard Legal Terms](#)

**Item breakdown**

[Export](#)

Item description	Unit of measure	Quantity	Comments
Uniform			
Branded Jumpers (Mens)	per jumper	500	
Branded Cardigan (Womens)	per cardigan	500	

**Time remaining**

2	6	5	28
Days	Hours	Minutes	Seconds

**Messaging**

You have 0 unread message(s).  
[View messages](#)

**Response controls**

**Start my response**

[Register intent to respond](#)

[No longer wish to respond](#)

**My responses**

You have not yet started your response.

The different sections are explained below;

### **Main details**

This section shows the title, description and date and time the completed tender must be returned by.

### **Public attachments**

This section shows the attachments that have been published by the organisation. To download click on the title of the attachment.

**Note:** There may be no attachments here, however, in the majority of cases there will be. Where there are documents, they should be **downloaded and saved** to your own network or desktop before working on them.

### **Item Breakdown**

This section is the item breakdown for the tender used for pricing, if one has been created by the organisation.

**Note:** This is an optional section and there may not be one included with an exercise.

This shows the description of the group/line item, the unit the item is measured in, the quantity of these units required and any additional comments regarding the line item (shown by hovering over the icon.) An example of one is shown below.

Item breakdown		<a href="#">Export</a>	
Item description	Unit of measure	Quantity	Comments
Uniform			
Branded Jumpers (Mens)	per jumper	500	
Branded Cardigan (Womens)	per cardigan	500	

This can also be exported if required, by clicking **Export**.

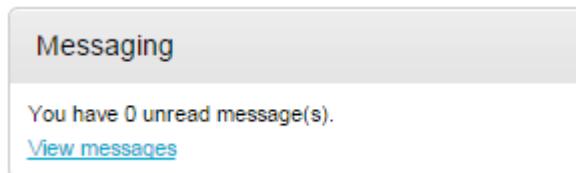
### **Terms and Conditions**

The Terms and Conditions section shows the terms that have been used with this tender. To view them click on the Terms & Conditions title, shown in blue. There will be at least one set of terms here and there can be more depending what the procuring organisation have set up.

Terms & conditions	
	<a href="#">Standard Legal Terms</a>

## Messages

During the process all questions should be raised using the portal. The ability to ask questions/send messages is found in the Messaging section. Anything sent through this area will go to the member of staff that is working on this within the procuring organisation. Open this area by clicking on **View Messages**.



The screenshot shows a light gray box titled "Messaging". Inside, a message says "You have 0 unread message(s)." followed by a blue link "View messages".

This will show any messages that have already been sent or received. To send a new message, click on the **Create new message** button.



The screenshot shows an "Inbox" screen. At the top, there are filters for "Ref No", "Subject", "From", and "Date". A message is listed: Ref No 1.1, Subject Additional Info, From Project team, Date 12/03/2015 15:40. Below the inbox is a green "Create new message" button.

Populate the subject along with the main body of text, and once done then click on the **Send** button. Attachments can also be added (details of adding an attachment within the system is included later in this guide).

### New message



The screenshot shows a "New message" form. It has fields for "To: Project team", "Subject: Branding", and "Attachments: +". Below the form is a text area asking "Will the branding be required on the front only, or back too?"

Click **Send message** to issue the message to the procuring organisation.

The sent message is now shown in the Inbox.

Inbox

Ref No	Subject	From	Date
<input type="checkbox"/> 1.1	<a href="#">Additional Info</a>	Project team	12/03/2015 15:40
<input type="checkbox"/> 2.1	<a href="#">Branding</a>	Cox & Clifton - Support	12/03/2015 15:44

[Create new message](#)

When a reply to that message is sent by the procuring organisation, you will see that the reply is linked to the original message by the numbering. All messages you send to the procuring organisation will be privately sent to them, shown by the  symbol. When the procuring organisation replies they may reply privately to you alone () , or publicly (so all suppliers involved in this stage) can see the response (). **Note:** The system will NEVER show which supplier sent the original message.

Inbox

Ref No	Subject	From	Date
<input type="checkbox"/> 1.1	<a href="#">Additional Info</a>	Project team	12/03/2015 15:40
<input type="checkbox"/> 2.1	<a href="#">Branding</a>	Cox & Clifton - Support	12/03/2015 15:44
<input type="checkbox"/> 2.1.1	<a href="#">RE: Branding</a>	Project team	12/03/2015 15:55

[Create new message](#)

## Completing the Response (using attachments)

To begin the response, from the tender summary screen, click **Start my response**.

The screenshot shows the tender summary screen for 'Cheshire - ITT'. It includes sections for 'Main details' (Title: Example ITT, Respond by: 03/14/2015 21:30:00), 'Public attachments' (ITT Attachment.docx, Specification & Requirements Document.docx), 'Messaging' (1 unread message), and 'Response controls' (Start my response, Register intent to respond, No longer wish to respond). A timer indicates 2 Days, 5 Hours, 21 Minutes, and 30 Seconds remaining.

## Responding to Online Questionnaires

When the tender is published an e-mail will be sent by the system to inform you of this and that the exercise (Pre Qualification Questionnaire, Invitation to Tender or the Request for Quotation) can now be viewed and worked on.

**Note:** While this section covers the questionnaire within a PQQ process, it remains the same for the return of any questionnaire, it is just the specific wording/questions that will change, the functionality will not.

### Question sets

Within the response wizard, one stage will be the **Question sets** section. Here, you can view the questionnaire(s) that is being used with the tender.

The screenshot shows the 'Create PQQ response' wizard at step 2, 'Question sets'. It lists three questionnaires: 'Pre Qualification Questionnaire' (Mandatory), 'Lot 1 Questionnaire' (Opt Out), and 'Lot 2 Questionnaire' (Opt Out). Each row includes an 'Edit Response' button and a progress bar. At the bottom are 'Continue', 'Reset', 'Cancel', and 'Back' buttons.

**Note:** This is optional, and the contracting organisation may not have included an online questionnaire, so if this stage may not be available.  
 If an evaluation has been included, click on **Edit response** to begin answering the questions/view further information and help.

Pre Qualification Questionnaire	Edit Response	Progress Bar (10 segments)
---------------------------------	---------------	----------------------------

This will open the evaluation summary screen.

### View Evaluation questions

Questions				
Question	Weight %	Section Status	Status	Flag
<b>1 Company Information</b>		Incomplete section	Section weight: 0.00%	
1.1 Company Name	0.00%	Answer question		
1.2 Company Address	0.00%	Answer question		
<b>2 Pass / Fail Questions</b>		Incomplete section	Section weight: 0.00%	
2.1 Do you have an environmental policy?	0.00%	Answer question		
2.2 Have you ever been declared bankrupt?	0.00%	Answer question		
2.3 Please confirm if the Applicant (or any organisation within the Applicant's group, including any parent or subsidiary companies) has been accused of or found guilty of blacklisting. If so, please provide details, including the steps taken to address this.	0.00%	Answer question		
2.4 The Council is	0.00%	Answer question		

**Progress**

**Key**

- ✓ The answer provided is valid and complete.
- ⌚ The answer has been automatically populated from a previous answer but it must be reviewed before submission.
- 🟡 The answer has been automatically populated from a previous answer and does not need to be reviewed.
- ⭐ The question has been flagged for review.

**Public attachments**

Specification & Requirements Document.docx	9 KB
--	------

### Online Response

The screen above shows you the sections and relevant questions in each section and the total weighting value of each individual section and question.

**Note:** Some questions may have a ✓ symbol next to them automatically. This means the question has been answered by you before, and is still valid.

1.1 Company Name      0.00%      Answer question      ✓

Click on **Answer question** to obtain more information about that question.

1.2 Company Address      0.00%      Answer question

This will now bring up further information, including the title, weighting, and help and public attachments linked to this question. It will also give you the ability to **answer the question**.

## Company Information | Question 2 of 2

Question	Weight
Company Address	0.00 %
<b>Answer</b>  Company Address is:  1 Supplier Street North Supplier UK SU1 1PL	<b>Question attachments</b>  No attachments
<a href="#">Save and close</a> <a href="#">Previous</a> <a href="#">Next</a>	<b>Help</b>  This question is mandatory Enter registered address of company

There may be further section help available. To view this, click [Show more information](#) in the top right of the screen.

[Show more information](#)

## Company Information | Question 2 of 2

Question	Weight
Company Address	0.00 %
<b>Answer</b>  Flag question for review <input checked="" type="checkbox"/>	<b>Question attachments</b>  No attachments

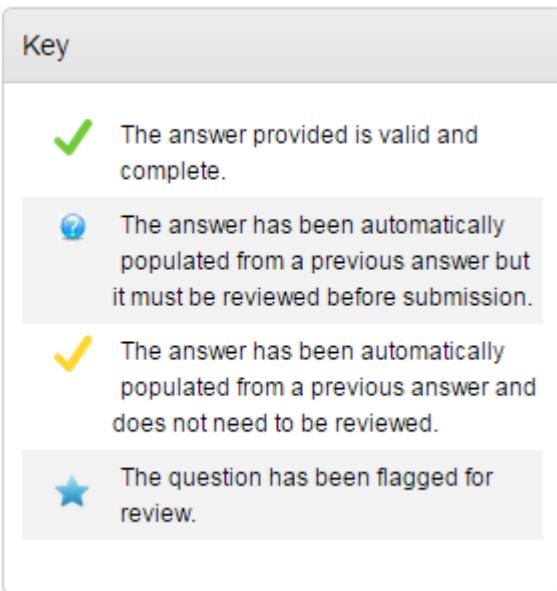
There is also the ability to **flag a question for review**, by marking the tick box.

Flag question for review

When you have answered a question, and are happy to move forward, you can either **Save and close**, which will take you back to the summary page, or click **Previous / Next** to move onto the questions before/after this one.

North Supplier UK SU1 1PL	This q Enter r
<a href="#">Save and close</a> <a href="#">Previous</a> <a href="#">Next</a>	

Alongside each question, you may have one of the following icons;



As you move through the questionnaire, the **Progress** bar on the summary page will reflect this and show how much has been completed.

#### [View Evaluation questions](#)

Questions					Progress
Question	Weight %	Section Status	Status	Flag	
1 Company Information	0.00%	Complete section	Section weight: 0.00%		/ 10 segments
1.1 Company Name	0.00%	Answered	Answered		

**Key**

Each question may give different options on how you are required to answer the question. Examples are below; however the answer method is dictated by the organisation who has requested your answers.

#### **Yes/No**

This type of question requires you to answer either Yes or No.

#### [Pass / Fail Questions | Question 1 of 5](#)

<b>Question</b>	
Do you have an environmental policy?	
<b>Answer</b>	
<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="checkbox"/> Flag question for review	
<a href="#">Save and close</a> <a href="#">Previous</a> <a href="#">Next</a>	

## Number

This type of question requires you to answer using numerical values.

### Financial Details | Question 1 of 2

#### Question

What was your company turnover for the last financial year?

#### Answer

Flag question for review

## Text

You are required to answer this type of question with text. You will be advised of a maximum number of characters.

### Company Information | Question 1 of 2

#### Question

Company Name

#### Answer

Flag question for review

Due North Ltd.

[Save and close](#)

[Previous](#) [Next](#)

## Option

This type of question requires you to choose from a drop down list

## General Information | Question 1 of 3

### Question

How many staff do you currently employ?

### Answer

Please select ▾

- Please select**
- 0 - 10
- 10 - 25
- 26 - 50
- 50 - 100
- 100+

Flag question for review

## Checkbox

To answer this type of question you must check the box alongside the relevant answer(s). It may be that you are able to give more than one answer.

## General Information | Question 3 of 3

### Question

Which of the following accreditations do you currently hold?

### Answer

- ISO27001
- Investor in People
- Other
- N/A

Flag question for review

## Attachment

With this type of question you are required to add an attachment as an answer.

## Technical Lot Questions | Question 1 of 1

### Question

Attach your technical response

### Answer

No attachments

Flag question for review

**Add attachment**

Click 'Add attachment' and you will be prompted with the document upload facility.

## Responding to Lot Questionnaires

When a buying organisation publishes questionnaire sets using Lots, they will appear in your Tender Summary page as shown below.

The screenshot shows a 'My response' section with a '27 Draft' status. It lists three questionnaire sets: 'Pre Qualification Questionnaire' (Mandatory), 'Lot 1 Questionnaire' (Opt out), and 'Lot 2 Questionnaire' (Opt out). Each entry has an 'Edit response' link and a progress bar. To the right is a 'Time remaining' box showing 'Respond by: 25 March 2015 01:30' with a timer counting down from 4 days, 10 hours, 59 minutes, and 6 seconds. Below that is a 'Response controls' section with 'Submit response', 'Open response wizard', and 'Submission checklist' buttons.

**Note:** Where 'Mandatory' is stated alongside a 'Lot' this means that the question set must be answered.

**Note:** Where 'Opt out' appear this means that the questions are optional to be completed.

A detailed view of the 'Evaluation criteria/question sets' table. It has columns for Title, Action, and Progress. The Pre Qualification Questionnaire is mandatory (progress bar full). The Lot 1 and Lot 2 Questionnaires are optional (progress bars partially filled).

Title	Action	Progress
Pre Qualification Questionnaire	<a href="#">Edit response</a>	Mandatory
Lot 1 Questionnaire	<a href="#">Edit response</a>	Opt out
Lot 2 Questionnaire	<a href="#">Edit response</a>	Opt out

The response is completed by clicking Edit response and answering the questions. Once you have complete a series of questions the progress bar will be full.

Pre Qualification Questionnaire [Edit response](#) Mandatory

If you wish to opt out of a non-mandatory set of questions, then you are required to click on **Opt out**.

Lot 1 Questionnaire [Edit response](#) Opt out

The system will then display your question sets in the following manor, to show questions sets you are required to answer and question sets you have opted out of.

Evaluation criteria/question sets			
Title	Action	Progress	
Pre Qualification Questionnaire	<a href="#">Edit response</a>	 Mandatory	
Lot 1 Questionnaire	<a href="#">Edit response</a>	 Opt out	
Title	Action	Progress	
Lot 2 Questionnaire	<a href="#">View question set</a>	 Opt in	

You can easily opt back in by clicking the *Opt in* option.

## The Response Wizard

This will open up the response wizard that will take you through each stage of the tender response to make sure it is completed successfully. Stage 1 will always contain a welcome message which should be read carefully.

### Create ITT response

1 Details	2 Item Breakdown	3 Attachments	4 Terms & conditions
<b>Response reference:</b> 25 Welcome to the ITT response wizard. The wizard will assist you with the completion of your response. You will be presented with a number of different steps to complete. Once each step has been completed you can click the 'Continue' button to proceed to the next step, or 'Back' to return to the prior step or 'Cancel' to exit the wizard. After the completion of each step, the response information entered will be saved as a draft, which will allow you to resume the response at a later date if required. Once all the steps have been completed and all mandatory response criteria have been met, you will be asked if you wish to submit your response. If you agree to submit your response, you will receive a confirmation receipt email. Please note, if you do not receive the confirmation email please contact support as you cannot be guaranteed that your response has been received.			
<a href="#">Continue</a> <a href="#">Reset</a> <a href="#">Cancel</a>			

From the options section at the bottom of the page click **Continue** to move onto the next page or click **Cancel** to leave the wizard.

## Item Breakdown

The next screen in this example is the Item description breakdown, however, if no item breakdown has been specified by the procuring organisation then this stage will not appear.

This stage is where the prices are entered for specific items.

This will show;

**Item description-** Here the specific item that is being asked for is specified

**Unit of measure-** Specified by the procuring organisation, this is the items that the item is measured in.

**Quantity-** The number of items required.

**Unit Price-** The price per unit of the item, in the specified currency, is entered here.

**Total-** This is calculated by the system by multiplying the quantity by the item price.

To enter the prices into the system click **Edit** in the corresponding row and enter the amount per item, with any comments (optional) and click **Save** to return to the overview, or **Next** to move to the next item.

Item description	Unit of measure	Quantity	Price	Total
Uniform				
Branded Jumpers (Mens)	per jumper	500	£0	<a href="#">Edit</a>
Branded Cardigan (Womens)	per cardigan	500	£0	<a href="#">Edit</a>

Item description	Item details
Branded Jumpers (Mens)	Unit of measure: per jumper Quantity: 500
Unit price <input type="text" value="10"/>	Comments
Supplier comments (optional) Same price for all sizes	200 L, 200 M, 100 S
<a href="#">Save</a> <a href="#">Next</a> <a href="#">Previous</a>	

If you prefer, you can export the item template to Excel, complete there, and then upload the completed template using the **Import/Export** area as highlighted below.

### Create ITT response

Item description	Unit of measure	Quantity	Price	Total
Uniform				
Branded Jumpers (Mens)	per jumper	500	£10.00	£5,000.00
Branded Cardigan (Womens)	per cardigan	500	£9.00	£4,500.00
Total: £9,500.00				

**Import/Export**

**Export item template**

**Upload completed template**

If required you can export the item breakdown to an xls spreadsheet. This can then be completed offline and uploaded by using the links provided.

**Continue** **Reset** **Cancel** **Back**

When complete click **Continue** to move onto the next page, **Reset** to begin the wizard again and remove all info, **Cancel** to leave the wizard completely (without saving) or **Back** to return to the previous stage.

## Uploading Attachments

The next stage allows you to upload your relevant tender attachments.

**Note:** In some cases an attachment will be mandatory, so it may not let you submit until an attachment is added at this stage.

### Create ITT response

No attachments

**Add attachment**

**Continue** **Reset** **Cancel** **Back**

To add an attachment click

**Add attachment**

You can now browse your computer for the attachments using the file uploader. You can add as many attachments as you require.

When uploaded, you can view an attachment by clicking its name, to remove the attachment click the red cross icon. When all required attachments have been added, click on the "Next" button to proceed to the next screen.



### [ITT Attachment.docx](#)

When complete click **Continue** to move onto the next page, **Reset** to begin the wizard again and remove all info, **Cancel** to leave the wizard completely (without saving) or **Back** to return to the previous stage.

## Terms and Conditions

The next stage asks whether you accept the Terms & Conditions associated with this tender. You can view the terms by clicking on its name in blue, which will open the Terms and Conditions documents attached.

Then you must select Accept or Decline, and if you do not agree you must specify the reasons why you do not agree in the space provided.

### Create ITT response

The screenshot shows a wizard interface with five tabs at the top: Details, Item Breakdown, Attachments, 4 Terms & conditions (which is the active tab), and Back. Below the tabs, there is a message: "Please follow the link to read the terms and conditions". A link labeled "Standard Legal Terms" is visible. Underneath the message, there are two radio buttons: "Accept" (selected) and "Decline". At the bottom of the screen, there are four buttons: "Finish" (highlighted in green), "Reset", "Cancel", and "Back".

When complete click **Finish** to go back to the summary screen, **Reset** to begin the wizard again and remove all info, **Cancel** to leave the wizard completely (without saving) or **Back** to return to the previous stage.

## Submitting The Tender Response

When all information is added you can submit the response by clicking **Submit response**. You will be required to reconfirm this by clicking Submit response for a second time.

My response      25 Draft

Terms & conditions - Accepted Decline  
Standard Legal Terms

Item breakdown      Edit

Item description	Quantity	Unit of measure	Comments	Price
Uniform				
Branded Jumpers (Mens)	500	per jumper	💡	£5,000.00
Branded Cardigan (Womens)	500	per cardigan	💡	£4,500.00
		Total		£9,500.00

Export

Time remaining  
Respond by: 14 March 2015 21:30  
2 Days    4 Hours    49 Minutes    5 Seconds

Response controls  
Submit response      Open response wizard  
Submission checklist  
Terms & conditions      Attachments

Attachments      Add  
IT Attachment.docx      12 KB

If the Submit response button is greyed out, the Submission checklist can be used to pick out why (anything with a red box will need revisiting.)

Submission checklist

- Terms & conditions
- Attachments

# Editing Tender Response and Re-Submission

An important feature that is available after the tender response has been submitted is the ability as a Supplier to edit this response before the submission time and date has passed.

All the procuring organisation will see, is the version number of the response, but no previous submissions, providing they are all returned on time (further information on this later).

To edit a response from the tender summary screen, click **Create new version**.

The screenshot shows the tender summary screen for 'Cheshire - ITT'. It includes sections for 'Main details' (Title: Example ITT, Respond by: 03/14/2015 21:30:00), 'Public attachments' (IT Attachment.docx, Specification & Requirements Document.docx), 'Terms & conditions' (Standard Legal Terms), and 'Response controls' (I would like to make a response, No longer wish to respond). A large 'Create new version' button is visible at the bottom right of the main content area.

When this is clicked it will create a draft Version 2.

The screenshot shows the 'My response' screen for Version 2. The status is displayed as '26 Draft'. This screen likely contains the same sections as the tender summary screen but is tailored for the current response version.

Each area can then be amended, either by editing the relevant section or clicking **Open response wizard**, and then submitted using the process outlined above.

The screenshot shows the response editor interface. On the left is the 'Item breakdown' table:

Item description	Quantity	Unit of measure	Comments	Price
Uniform	500	per		

On the right are the 'Response controls' options: Submit response, Open response wizard, and Submission checklist.

# Managing Account Details

If at any point you need to alter/update your personal details or account information then you can do this from the **Your Account** section of the system. This area is accessed by logging into the portal and then clicking on the option in the top right of the screen.

The screenshot shows the home page of a web application. At the top, there is a navigation bar with links for 'Home', 'Find opportunities', 'My activities', 'Chris Cox', 'Your account', and 'Logout'. Below the navigation bar, the page title is 'Home page'. On the left, there is a 'News and announcements' section with two items: 'French sports stars die in Argentina' and 'Terror apologists must share blame'. Each item has a small thumbnail image, a title, a brief description, and a 'More' link. On the right, there is a 'Company details summary' section for 'Cox & Clifton', which includes the address '1 DN Support, Support Town, Northumberland, NE23 1LZ', a 'Description' section with 'Support' listed, and a 'Keywords' section.

## Changing your Password

To change your Password or Memorable Information used to login to the portal, click **Edit** within the *Login details* section.

### User details

This screenshot shows the 'User details' section. It contains a 'Location' field and an 'Organisation' field containing the value 'Cox & Clifton'.

This screenshot shows the 'Login details' section. It contains fields for 'User name' (set to 'chris.cox'), 'Memorable word' (set to '\*\*\*\*\*'), and 'Password' (set to '\*\*\*\*\*'). There is also an 'Edit' link next to the section header.

To make changes to your password or memorable information you must firstly add your **Current Password**. You can then add your **new password** (must be inserted twice) and new memorable information/hint as required.

## Edit login details

Current Password

New Password

Your password must be between 8 and 12 characters long, contain a mixture of UPPERCASE and lowercase letters and also at least 1 numeric.

Confirm new password

Once the changes have been made, click **Update login details** from the bottom of the page or Click **Cancel** to return to your account without making changes.

[Update login details](#) [Cancel](#)

## Updating your Personal Details

From the Your Account page you can also update your own personal contact information by clicking **Edit** within the *Contact details* section.

Contact details

[Edit](#)

**Name:** Mr Chris Cox

**Job title:** Support

**Email address:** chris.cox@due-north.com

**Telephone:** 01670597120

**Fax:**

**Mobile:**

**Address:** 1 DN Support  
Support Town  
NE23 1LZ

This will open the *Update contact details* screen, and from here you can change and update your contact information as necessary.

Update contact details

<b>User name</b>	chris.cox		
<b>Title</b>	<b>First name</b>	<b>Surname</b>	
Mr	Chris	Cox	
<b>Job title</b>			
Support			
<b>Email address</b>	<b>Confirm email address</b>		
chris.cox@due-north.com	chris.cox@due-north.com		
<b>Telephone Number</b>			
01670597120			
<b>Fax number</b> (optional)			
<b>Mobile number</b> (optional)			

You can also select a different contact address by clicking [Change address](#) if required. This will bring up a list of existing addresses linked with this account. To select a contact address, mark the **radio button** to the left of the relevant address.

Update contact details

Address	Town	County	Postcode	Country
<input checked="" type="radio"/> 1 DN Support,	Support Town	Northumberland	NE23 1LZ	United Kingdom
<a href="#">Use this address</a> <a href="#">Create new address</a> <a href="#">Cancel</a>				

The [Create new address](#) button can be used to add a new address to the list. Enter the details and click **Create address** when complete. That new address will be made available for selection.

Create new address

<b>Address line 1</b>
<b>Address line 2 (optional)</b>
<b>Town</b>
<b>County</b>
-- Please select --
<b>Postcode</b>
<b>Country</b>
-- Please select --
<a href="#">Create address</a> <a href="#">Cancel</a>

Click [Update contact details](#) from the options at the bottom of the page when all details have been changed, or **Cancel** to return without making any changes.

## Updating your User Image

From the Your Account page you can also update your image by clicking **Edit** within the *User Image* section.

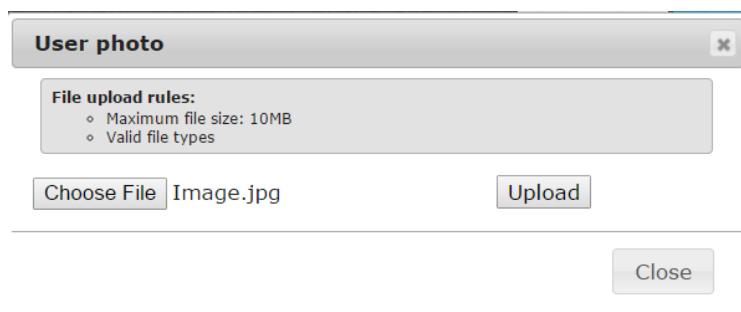


user

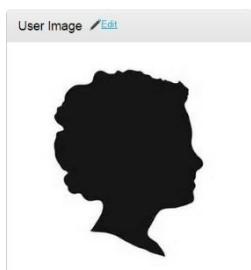
This will now allow you to choose an image/file to upload. Select **Choose File** and navigate to the desired file.



Once the **image/photo** is selected, click **Upload**.



This will now be shown within the *User Image* area of Your Account.



## Updating Workgroups

From the Your Account page you can also update the workgroup you belong to by clicking **Edit** within the *Workgroups* section. (**Note:** This ability to change your assigned workgroups is only available if you have the role of Company Administrator or Workgroup Administrator.)



The screenshot shows a user interface for editing workgroups. At the top, there is a header bar with the title "Workgroups" and an "Edit" button. Below the header, the text "Workgroups: Support" is displayed. A note below the title says "Please select which workgroups this users belongs to". There is a checkbox next to the word "Support" which is checked. At the bottom of the screen are two buttons: a green "Update workgroups" button and a blue "Cancel" link.

## Updating Access Rights

From the Your Account page you can also update your rights by clicking **Edit** within the *Access Rights* section. (**Note:** This ability to change your access rights is only available if you have the role of Company Administrator.)



The screenshot shows a user interface for editing access rights. At the top, there is a header bar with the title "Access rights" and an "Edit" button. Below the header, the text "Rights: Company Administrator" is displayed.

There are 3 roles available;

**Company Administrator** – You will have full access to view and edit Company details, with the ability to create and edit accounts/contact within the Company profile. You can also edit workgroups and user roles.

**Workgroup Administrator** – You will be able to add new workgroups to the Company account, and change which users sit within each workgroup. However, if only this role is selected they will not get full company administrator rights.

**Basic** – If neither of the above are ticked, then you will have Basic supplier rights, you can change your own contact details, but gain none of the access mentioned above.

Tick the **roles** that apply, and then click **Update rights**.

Update Access Rights

**Rights (optional)**  
Please check all that apply. This information is used for reporting purposes only.

Company Administrator  
 Workgroup Administrator

**Update rights** [Cancel](#)

## Viewing Audit History

There is also the option to view the **Audit History** linked to this account.

Audit history

[View audit history](#)



### Audit History for Chris Cox

Date and time	Description	Actioner
09/03/2015 14:15:06	User created via company approval	Mr Buyer One
10/03/2015 10:35:44	User Contact details updated	Mr Chris Cox
10/03/2015 10:37:31	User Contact details updated	Mr Chris Cox
10/03/2015 11:31:06	User updated their photograph	Mr Chris Cox

**Close**