procontract

SUPPLIER GUIDE

FOR

THE TENDER PROCESS WITHIN PROCONTRACT

Contents

The Tender Process within ProContract (including ITT/PQQ/RFQ)

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. The following section of the user guide will take you through the whole tender response process.

Note: While this guide covers the questionnaire process (PQQ) it remains the same for the return of an ITT or an RFQ, it is just the specific wording that will change, the functionality will not.

Viewing the Exercise Details/Documents

Login to the system and then it will take you to the screen highlighted below

From here to view your current opportunities that you are working on, from the "My Opportunities" section located on the right hand side of the screen click "My Opportunities" to view these.

This will take you to your own personal Opportunities page as shown below; this is where all your tender opportunities will be visible from after they have been published by the procuring organisation.

From your opportunities page you can take part in all the various tenders that you are involved with, so this can be an ITT (Invitation to Tender), RFQ (Request for Quotation), a PQQ (Pre Qualification Questionnaire).

To view an exercise (ITT/RFQ/PQQ), click on the drop down arrow and choose the relevant organisation and click on the green button, as shown.

Note: The process is the same in the system for all types of tender opportunity, PQQ, ITT and RFQ's, 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 questionnaire or a quotation then the screens will remain the same, it is only the terminology that will change.

The screen will then show all of the contracts you are currently involved with.

As shown, the Title of the contract, the unique system contract ID, the date this tender was received. In this case it shows as [icon] to reflect it has just been sent and it has not yet been viewed or worked upon.

To view the contract detail, click on the contract ID shown in blue.

By clicking on this, the details will be shown as shown on the screen below, which is the Supplier Dashboard screen. From this screen all aspects of the contract 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 tab.

To view the relevant stage of the contract click on the tab, in this instance 'Test Tender (ITT)'. Once you have highlighted the relevant stage you require click on either the title in blue or the folder in the right hand corner of the stage to view the details.

Contract: Library Book (DEVA-8TXC6M)

Stage Please Select ▾ 🔄

| << | **Library Book (ITT)** | >> |

Stage Detail

Title	Reference	Respond By	Response Status
Library Book (ITT)	ITT-DEVA-8TXCSR-1	04/05/2012 12:30:00	New

Stage Options

| View Stage Detail | Archive Contract | Close |

This will open the screen shown, which is the Tender screen. This is broken up into two sections the top section is the 'Tender Information' section and the bottom section is the 'My Response' section.

To view the tender information in more detail click on the word 'View' to the top right hand corner.

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ITT Information		View ITT
Contract Ref No:	DNCC-DEVA-8TXC6M	
Contract Title:	Library Book	
Ref No (Version):	ITT-DEVA-8TXCSR-1 (Version 1)	
Title:	Library Book	
Response Required By:	05/04/2012 12:30:00 PM	
Attachments:	0	

My Response	
Status:	New
Version:	1
Intent To Respond:	Not Sent
Supplier Ref No:	Not Set

Options

Response Wizard   Opt Out   Register Intent   Finish

This will open the Tender Information in full detail where you can view all attachments and download them to work upon.

Invitation To Tender (ITT) - Amended
Summary of amended tender information

Amendment Information	
Amended:	03/05/2012 10:36:23
Amended Sections:	✗ Submission Information ✗ General Information ✗ Specification Breakdown ✗ Terms & Conditions ✔ Evaluation Criteria ✗ Attachment(s)
Description:	Evaluation added

Submission Information	
Respond By Date:	04/05/2012
Respond By Time:	12:30:00
Supplier Attachment Required:	No

General Information	
Description:	Assorted books
Additional Documentation:	N/A
Point of Delivery:	N/A

Submission Information

The first section is the submission information which shows the date and time the complete tender must be returned by. It also shows if the contracting organisation has specified that at least one attachment will be required before you can submit your response.

General Information

The next section is General information and this will show a description of the tender and additional information regarding any additional documentation and also the point of delivery for the good/service being tendered for.

Specification Breakdown

The next section is the specification breakdown for the tender, if one has been created for this tender.

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

This shows the description of the line item, the unit the item is measured in, the quantity of these units, the currency the amount should be entered in and any additional comments regarding the line item. An example of one is shown below.

Description is the description of the item, unit of measure is the unit that the product is measured in (per item, per sheet, per pack of 24 etc) the quantity is the number of these Unit of Measure's that are required and comments allow the buying organisation to enter further.

Specification Breakdown

Description	Unit of Measure	Quantity	Currency	Comments
Educational Book	per Book	100000	£	
Sports book	per Book	50000	£	
Fiction Book	per Book	250000	£	

Evaluation Section

Within the evaluation section you can view the evaluation that is being used with the tender, this is also where you can view online questions if they are being used by the buying authority.

Evaluation

	Name
	1.1 Standard Evaluation ITT

Note: This is optional and the contracting organisation may not have included the evaluation here, so if this section may be empty. In this case the evaluation "Standard Evaluation Template" has been included with this tender.

If an evaluation has been included to view, click on the name of the evaluation, which in this example is called "Standard Evaluation Template" If no evaluation has been included then nothing will appear in this section.

This will open the evaluation summary screen as shown for the evaluation "Standard Evaluation Template".

Note: If the organisation has set up the quote/tender/questionnaire so that it must be answered online, then this section shows the questions that will have to be answered.

Evaluation Summary
Summary

Title

Title:	1.1 Standard Evaluation ITT

Summary

Section Title/Question	Weight(%)
Financial Assessment Section	0
Has your organisation met the terms of its banking facilities and loan agreements (if any) during the past year?	0
What was your turnover in the last two years (if this applies)?	0
Have you ever been declared bankrupt, either voluntarily or involuntarily?	0
General Questions	100
Business Name (or consortium name)	0
Registered or trading name (if different)	0
Type of Organisation	0
Registered Address	0
Correspondence Address (if different)	0
Address from which the contract will be provided (if different from previous)	0
Project plan and timescales	100

Attachments/Links

No Attachments or Links

Options

Cancel

Once you are finished viewing the evaluation criteria, then click on "Cancel" to exit the screen and return to the tender information.

Then once all the details have been viewed that you require click on "Finish" at the bottom of the screen in the options section to exit the Tender Detail screen.

The Questionnaire/Tender/Quote Documents

The attachment section shows all the current attachments to the tender. These can be documents or links to a webpage, although in this case both are documents. A webpage would be shown with a link icon rather than a paperclip.

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.

To ensure they are saved, **right click** on the relevant attachment, and select to **"Save Target As"** and save this somewhere where it can be opened/accessed later.

The example below shows a tender that has no attachments with it.

Attachments
There are currently 0 attachment(s) uploaded to this ITT
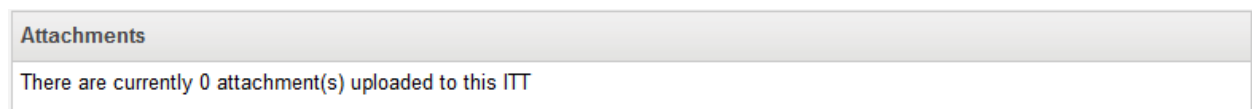
Terms and Conditions

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 sets of terms here and there can be more depending what the procuring organisation have set up.

Terms & Conditions
Title
General
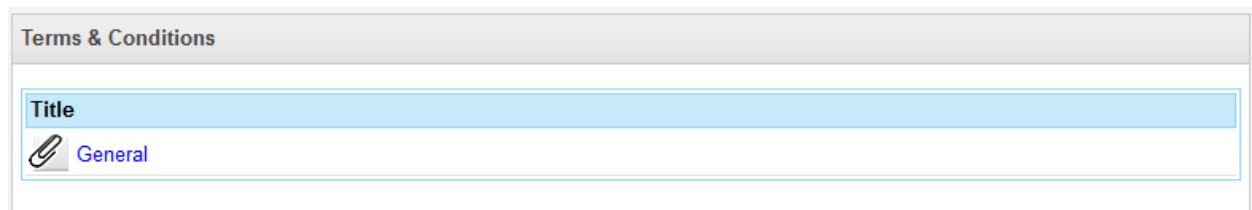
When all the details have been viewed, and the documents have been downloaded, click the "Finish" button from the bottom of the page to return to the summary page.

Discussions

Question and Answer Facility

During the process all questions should be raised using the portal. The ability to ask questions is found in the Discussion section.

This is located on the right hand side of the screen and looks as shown, and there are two sections within. The Question and Answer section is where questions are asked regarding the tender, and they will go to the member of staff that is working on this within the contracting organisation. The Post Tender Clarification Section is the area that the contracting organisation can ask you questions after the tender responses have been viewed with any queries regarding your response.
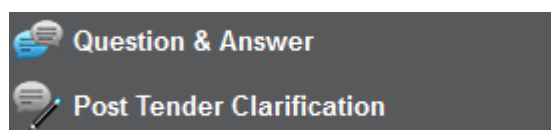
To ask a question, click on the Question and Answer section title in the discussions section.

This will open up the question and answer section as shown on the screenshot below; here any existing questions will show up along with any additional information that has been issued.

To ask the contracting organisation a question, click the "Ask Question" button.

Populate the question subject needs to be specified along with the main body of text, and once done then click on the Send button.

Invitation To Tender (ITT)
Question & Answer

Question

Please Note: Do not identify yourself or your company in the question you raise, the procurement team will have this information to hand when viewing your question.

*Subject:

Clarification on Q3

*Question:

Can your please expand upon......

Options

Send   Cancel

Then the screen will look as shown when the question has been asked.

Invitation To Tender (ITT)
Question & Answer

Questions

Created Date	Status	Availability	Subject	Answered	Made Public
03/05/2012 11:00	✉	👤 Private	Clarification on Q3	N/A	N/A

Additional Information

There is currently no additional Information to display

Communications   ✎ Change Communication

Receiving Emails

Options

Ask Question   Finish

When the procurer has answered the question then the screen will look slightly different as the icons will change to reflect the fact an answer has been received and when the answer was received

When the contracting organisation answers your question then the Q&A screen will change and look as below. Here the status shows that the question has been answered, the availability shows that

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the answer was made public to all suppliers in the tender and to view the answer then click on the question title, shown in blue.

Note: The answer can be private if the information does not need to go to all suppliers, and the icon will reflect this, and only the supplier who asked the question will see the answer.

Questions					
Created Date	**Status**	**Availability**	**Subject**	**Answered**	**Made Public**
03/05/2012 11:00	✉	👤 Private	Clarification on Q3	N/A	N/A

New Discussions

If after having read the tender details and viewed the attachments there is a question that you need to ask regarding the tender then from the Tender Summary Screen you can do this via the discussions section and clicking the link.

💬 Discussion(s)

You will then see any existing questions/discussions for this stage of the tender process and also be able to create a new question/discussion by clicking create.

Messages	
View	
No Messages Found	
Options	
Create New Message Close	

Next the question subject needs to be specified along with the main body of text. Also dependant upon the organisations setup, you may have the opportunity to attach a file/document with the message/question and once done then click on the Send button. (The screen shown allows for an attachment to be added).

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You are now able to see you question and track the answers.

When a question has been replied to you personally you will see that the reply is linked to the original message and shows as an indent to the original message. As per the image below.

Whenever the message initiated or responded to publicly by the buying organisation it will show as a new thread (message) which will be broken by a dotted line. See below

View					
Subject	**Date**	**Time**			
Additonal Info	03/05/2012	12:52:50		(Public)	✉
What is the process for...	03/05/2012	12:13:30		(Private)	📩
Re: What is the process for......	03/05/2012	12:15:08		(Private)	✉

Options
Create New Message   Close

Additional Information

Additional information that is issued will also be shown here, and will appear in the Additional Information Section, however by default this will always be public, so all involved suppliers will see this.

Invitation To Tender (ITT)
Question & Answer

Questions					
Created Date	**Status**	**Availability**	**Subject**	**Answered**	**Made Public**
03/05/2012 13:10	✉	👤 Private	User Guide Question 1	N/A	N/A

Additional Information			
Date	**Status**	**Availability**	**Title**
03/05/2012 13:13	📩	Public	This additional information is required

Communications	Change Communication
Receiving Emails	

Options
Ask Question   Finish

To view this information click the title of it, shown in blue.

Here the information issued will show along with any attachments that may have been sent. Attachments show on the right hand side and can be viewed and downloaded by clicking their name.

Invitation To Tender (ITT)
Question & Answer

Additional Information
....

Current Attachment(s)
No Attachments or Links

Options
Finish

When finished in this section click the "Finish" button from the options at the bottom of the screen

Then from the Question and Answer screen, click on "Finish" to return to the Tender Summary screen.

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Completing Questionnaire/Tender/Quote Response

From the tender summary screen as shown below the response to the tender is put together and completed.

You are not able to start your response until you have viewed the PQQ/ITT/RFQ documents which you can by clicking on the 'View ITT'. Also once you have viewed the Tender Information you will be able to use the Intent to respond. This allows you to inform the buying organisation of your intention to respond to the tender.

In the "My Response" section it will show the status of the tender along with other details, "New" shows that it has not yet been worked on. Click on the Response Wizard button to start your response.

You can view your tender response at any point you can click on the "View Response" icon in the top right hand corner of this section.

This will open the response summary screen. From here individual sections can be edited, however it is strongly recommended that to complete the response the "Response Wizard" is used.

Invitation To Tender Response Wizard Step 5 of 5 (Summary)
* Denotes Mandatory Step(s)

* Step 1 (Tender Information)		Edit Step 1 (Tender Information)
Version:	1	
My Reference:	Not Set	
Tender Information:	N/A	
Additional Comments:	N/A	
Delivery Period:	N/A	
Price(s) Firm Until:	N/A	

Step (Specification Breakdown)   Edit Step (Specification Breakdown)

Description	Unit of Measure	Quantity	Currency	Comments	Unit Price	Sub Total
Educational Book	per Book	100000	£			
Sports book	per Book	50000	£			
Fiction Book	per Book	250000	£			
					Grand Total	£ 0.00

* Step 2 (Online Questions)   Edit Step 2 (Online Questions)

1.1 Standard Evaluation ITT

Step 3 (Attachments)   Edit Step 3 (Attachments)

There are currently 0 attachment(s) uploaded to your response

* Step 4 (Terms & Conditions)   Edit Step 4 (Terms & Conditions)

Title
📎 General

Accept Terms: Not Set

Options

Save As Draft   Submit Response

Note: In this section the "Submit Response" button will be greyed out until all the mandatory sections have been complete, allowing you only to "Save as Draft" until all the sections are complete.

The Response Wizard

To complete your tender response, click on the "Response Wizard" button from the bottom of this page. This is used to return your completed response to the procuring organisation.

This will open up the Tender response wizard that will take you through each step of the tender response to make sure it is completed successfully. While it is possible to complete the response without using the wizard **use of the Wizard is strongly recommended to complete your responses.**

Invitation To Tender Response Wizard Introduction

Message

Welcome to the Invitation To Tender response wizard
The wizard will assist you with the completion of your Tender
You will be presented with a number of different steps to complete from basic response information to uploading any attachments you may require. Once each step has been completed you can click the '**Next**' button to proceed to the next step. '**Previous**' buttons are also available allowing you to return to the prior step at anytime.
After completion of each step the response information entered will be saved as draft which will allow you to return the response wizard at a later date if required.
Once all 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 this email please contact support by clicking the

Contact Support ⓘ icon located at the top right of the screen as you cannot be guaranteed that your response has been received.

Options

Next   Cancel

From the options section at the bottom of the page click "Next" to move onto the next page and click "Cancel" to leave the wizard.

Tender Information

Clicking "Next" will open up Step 1 the "Tender Information" screen here complete your tender information, filling in the details as required. Ensure that the mandatory field of "My Reference" is complete, this is just a free text reference that will help the procuring organisation reference your tender.

The other four fields are non mandatory and do not have to be completed in order to make a response. Ensure any dates are entered in the correct/specified format.

When the details have been filled out as required then from the Options section at the bottom of the page, click on "Next" to move onto the next screen.

Online Response

The next screen gives you an example of an online Evaluation . It shows you the sections and relevant questions in each section, a more information icon, the total weighting value of each individual section and question and also shows if the same question has been answered in a previous tender and that the answer is valid with a green tick but still requires checking. The answer that you give is held against the question but this is only relevant for an online tender response with a question that is held in the online library. Click on the 🛈 icon to obtain more information about that section/question. This information is shown in the right-hand side of the page.

Invitation To Tender Response Wizard Step 2 of 5 (Online Questions)
* Denotes Mandatory Fields

Tender Online Questions

📄 Back to summary
Title: 1.1 Standard Evaluation ITT

Section Title/Question		Weight(%)
Financial Assessment Section	🛈	0.0
* Has your organisation met the terms of its banking facilities and loan agreements (if any) during the past year?	🛈	0.0
* What was your turnover in the last two years (if this applies)?		0.0
* Have you ever been declared bankrupt, either voluntarily or involuntarily?		0.0
General Questions	🛈	100.0
* Business Name (or consortium name)		0.0
Registered or trading name (if different)		0.0
* Type of Organisation	🛈	0.0
* Registered Address		0.0
Correspondence Address (if different)		0.0
Address from which the contract will be provided (if different from previous)		0.0

Attachments/Links

No Attachments or Links

Options

Previous   Next

To answer a question click on the question title. Once you have answered the question click on either of the three buttons at the bottom of the page.

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Invitation To Tender Response Wizard Step 2 of 5 (Online Questions)
* Denotes Mandatory Fields

Tender Online Questions

📁 Back to summary

Section Title/Question			Weight(%)
Has your organisation met the terms of its banking facilities and loan agreements (if any) during the past year? If the answer to the question is no, what were the reasons, and what has been done to put things right? • ⚪ Yes • ⚪ No * You must select an option	💬 📎	0.0	

Attachments/Links

No Attachments or Links

Options

Save & Previous	Save & Next	Save

Save & Previous - This saves the information you have input and takes you back to the previous question.

Save & Next - This saves the information you have input and takes you to the next question.

Save - This saves the information you have input and you remain on the same question.

Note: You must save each entry you have made before going back to the summary.

With each question you may have three icons they are as follows

💬 - Click on this icon to add a comment to this question. If a comment has already been made with the question then it will be shaded grey. Comments will be held against the question if it should be used in a future online tender response.

📎 - This icon allows you to add an attachment to the question should the organisation allow you to do so with the question. This attachment is saved with the question so therefore when the question is asked again, the attachment will be held with the answer to the question.

🛈 - Click on this icon to see more information about the question. The information will be displayed on the right hand side of the screen.

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.

Number

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

Text

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

Option

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

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.

Attachment

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

Response Online Questions

Back to summary

Section Title/Question		Weight(%)
Bankers letter Please fill in the draft bankers letter which can be found under public attachments in the top right of this page as appendix 1 and attach as your reply to this question. Add Attachment		0.0

Click 'Add attachment' and you will be prompted with the following screen.

Attachments
Use this form to add or remove attachments
* Denotes Mandatory Fields

Attachment

Please choose the file you wish to attach by using the browse button:-
* Attachment: Browse...

A 10MB file will take approximately 5 mins on average to upload on a standard Broadband connection (256Kbps upload speed). Please take this into consideration when uploading larger files.

Options

Save   Cancel   Upload Multiple Attachments

Lots

When a buying authority publishes a tender using lots, they will appear in your Tender Summary page as shown.

Invitation to Tender
Summary of Invitation to Tender tender information

Submission Information	
Respond By Date:	15/05/2012
Respond By Time:	17:00:00
Supplier Attachment Required:	No

General Information	
Description:	Desc
Additional Documentation:	N/A

Specification Breakdown
There are currently no line items in your specification breakdown

Evaluation

Name
Lot 1
Lot 2
Mandatory Base Template

Attachments
There are currently 0 attachment(s) uploaded to this ltt

Terms & Conditions

Title
General

Options
Finish

When you are going through the response wizard the lots that have been published with the tender will appear as shown.

Invitation to Tender Response Wizard Step 2 of 5 (Online Questions)
* Denotes Mandatory Fields

Question Sets

	Title	Status	Opt-out
1:	Mandatory Base Template		M
2:	Lot 1		
3:	Lot 2		

Attachments/Links

Attached/Link Name	Size	Date Uploaded
Attachment.docx	12kb	15/05/2012

Options
Previous Next

Note: Where the 'M' is situated alongside a lot this means that the questions are mandatory to be completed before a response can be submitted.

Note: Where the blue and green arrows appear this means that the questions are optional to be completed.

Click on the title in blue to view the questions for that particular lot. The questions will appear in sections as shown. Complete each question by clicking on the question itself and inputting a response in the required format. Return to the series of lots by clicking on the "Back to Question Sets" button.

Once you have complete a series of questions the status will show complete full of green as shown. If you wish to opt out of a non mandatory set of questions then you are required to click on the blue and green arrow relevant to that series of questions.

You are then prompted with the message as shown. Confirm by clicking 'OK'.

The system will then display your question sets in the following manor, to show questions sets and opted out question sets.

Invitation to Tender Response Wizard Step 2 of 5 (Online Questions)
* Denotes Mandatory Fields

Question Sets

	Title	Status	Opt-out
1:	Mandatory Base Template	[green bar]	M
2:	Lot 1	[empty bar]	[icon]

Opted Out Question Sets

Evaluations

Title	Status	Opt-in
3: Lot 2	[empty bar]	[icon]

Attachments/Links

Attached/Link Name	Size	Date Uploaded
Attachment.docx	12kb	15/05/2012

Complete the remainder of your optional question sets that you wish to complete and then click next.

Invitation to Tender Response Wizard Step 2 of 5 (Online Questions)
* Denotes Mandatory Fields

Question Sets

	Title	Status	Opt-out
1:	Mandatory Base Template	[green bar]	M
2:	Lot 1	[green bar]	[icon]

Opted Out Question Sets

Evaluations

Title	Status	Opt-in
3: Lot 2	[empty bar]	[icon]

Attachments/Links

Attached/Link Name	Size	Date Uploaded
Attachment.docx	12kb	15/05/2012

Your summary page will be shown as below, clearly identifying those question sets that you have completed.

Invitation to Tender Response Wizard Step 5 of 5 (Summary)
* Denotes Mandatory Step(s)

* **Step 1 (Response Information)**   [Edit Step 1 (Response Information)]

Version:	1
My Reference:	James
Response Information:	N/A
Additional Comments:	N/A
Delivery Period:	N/A
Price(s) Firm Until:	N/A

* **Step 2 (Online Questions)**   [Edit Step 2 (Online Questions)]

[green bar] Mandatory Base Template
[green bar] Lot 1

Step 3 (Attachments)   [Edit Step 3 (Attachments)]

There are currently 0 attachment(s) uploaded to your response

* **Step 4 (Terms & Conditions)**   [Edit Step 4 (Terms & Conditions)]

Title

General

Accept Terms:	Yes

Options

[Save As Draft] [Submit Response]

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Specification Breakdown

The next screen is this example is the Specification Breakdown, however if there has been no specification breakdown specified by the contracting organisation then this will not appear, and instead the next screen will be the attachments screen.

In the specification breakdown this is where the prices are entered for specific units, as asked by the contracting organisation.

This will appear as shown in the screen below,

Description- Here the specific item that is being asked for is specified

Units- Specified by the contracting organisation, this is the units that the item is measured in

Quantity- The number of units required

Currency- Any additional information on the item, the full text can be seen by hovering the mouse over the text, currently always set to GBP (£)

Unit Price-The price per unit of the item, in the specified currency, entered by the supplier

Subtotal- This is calculated by the system by multiplying the quantity by the unit price

To enter the prices into the system then click into the corresponding field and enter the amount per unit.

Unit Price

| 10.58 |

Tender Breakdown Information

Description	Unit of Measure	Quantity	Currency	Comments	Unit Price
Educational Book	per Book	100000	£		10.58
Sports book	per Book	50000	£		
Fiction Book	per Book	250000	£		

Options
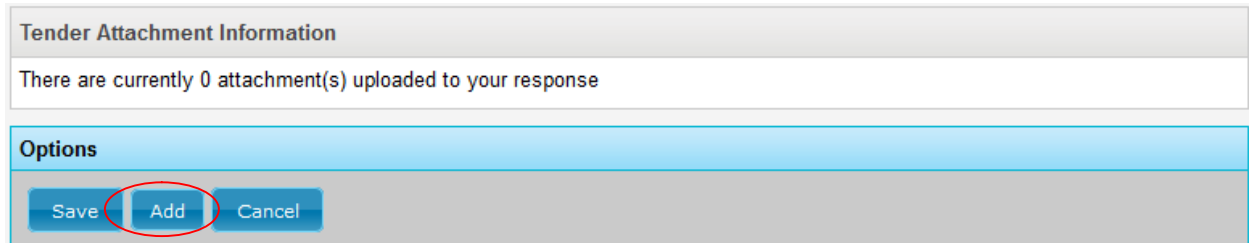
Save   Cancel

Then once complete click the next button to continue, or "Previous" to view the previous screen.

Uploading Attachments
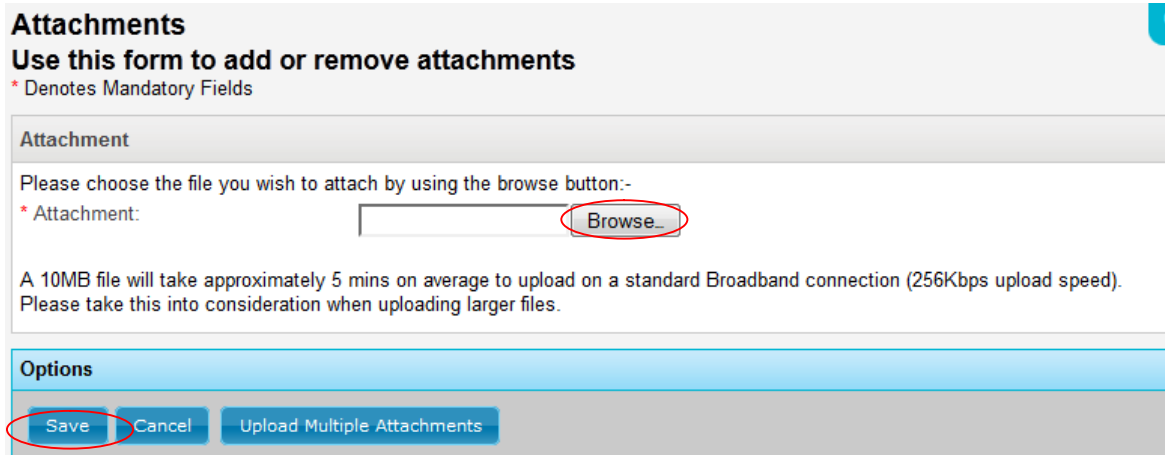
The next screen that will be seen is the attachment screen, where you upload/manage the attachments you wish to send with this tender response.

Note: If you try to progress through the wizard without attaching a document and you receive the message below, you must provide an attachment to be able to submit a response.

Tender Attachment Information
There are currently 0 attachment(s) uploaded to your response

Options

Save   Add   Cancel

To add an attachment then click the "Add" button from the Options section.

To browse your computer for the attachment to use click the Browse button and select the document you wish to attach.

Attachments
Use this form to add or remove attachments
* Denotes Mandatory Fields

Attachment

Please choose the file you wish to attach by using the browse button:-

* Attachment: Browse…

A 10MB file will take approximately 5 mins on average to upload on a standard Broadband connection (256Kbps upload speed). Please take this into consideration when uploading larger files.

Options

Save   Cancel   Upload Multiple Attachments

To save the attachment to the response click "Save", this will return you to the previous screen with the attachment added.

To view an attachment click its name, to remove the attachment click the red cross icon, to add more click the "Add" button.

When all required attachments have been added, click on the "Next" button to proceed to the next screen.

Note: The contracting organisation can mandate that there must be at least one attachment with the tender response, in this case you will not be able to proceed to the next screen without saving at least one attachment.

Mass Multiple Uploads

Multiple documents can now also be added to your response if required, initially click 'Add' within the 'Attachment' section of your response as normal.

The' Attachments' screen is now diplayed as shown, click 'Upload Multiple Attachments 'link

You now need to choose the relevant files that you wish to upload, therefore click on select files.

You now need to choose the appropriate location on your computer/server that your files are stored and select the files that you wish to upload.
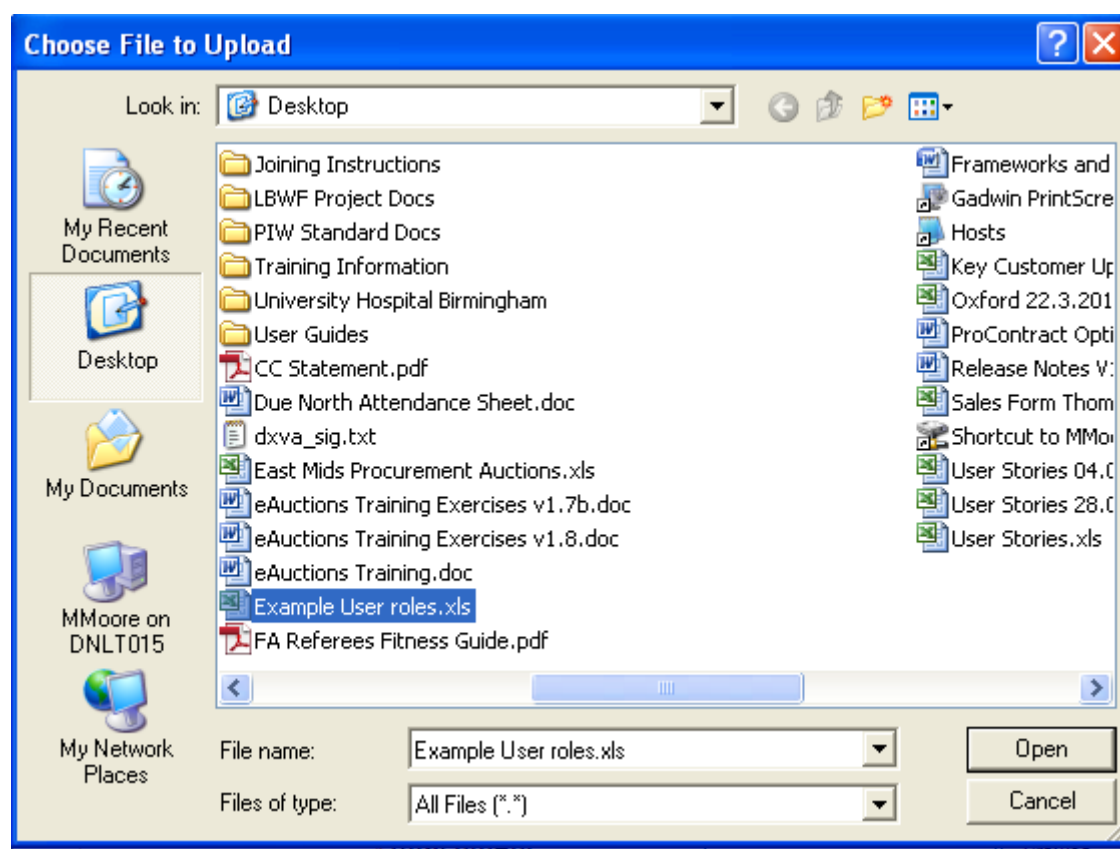
Note: To select more than one file at a time hold your 'CTRL' key down while selecting the relevant files.

Once you have chosen the files that you wish to upload, they will appear as shown. If you have selected the wrong file then you are able to delete the file be clicking on the 'Remove' title. Once happy with the chosen files click on 'Start all Uploads'.

File Selection

📎 Chrysanthemum.jpg (859 kB)	remove
📎 Desert.jpg (826 kB)	remove
📎 Hydrangeas.jpg (581 kB)	remove
📎 Jellyfish.jpg (758 kB)	remove

0 files uploaded

Options

Select Files Start Uploading Confirm & Finish

During the upload process of each file you will get the following screen showing the progress of each upload.

You may at any point cancel your upload.

Note: If you cancel your uploads you cancel all of the files to be uploaded.

Upon the files being fully complete, your file selection area will be completely blank with your chosen files being held in the file confirmation area.

Note: You are still able at this point to delete files that have been chosen incorrectly.

Your files now appear in the 'Current Attachment' area as shown. Click 'Finish' to return to your attachment page.

Terms and Conditions

The next screen that will appear is the Terms and Conditions screen, where you must state whether or not you agree to the terms specified by the contracting organisation.

You can view the terms by clicking on its name under the title, shown in blue, which will open the terms and conditions documents attached.

Then you must select yes or no, and if you do not agree specify reasons why you do not agree in the space provided.

Then click "Next" to move onto the next page or "Previous" to go back to the previous page.

This will take you to the summary screen of the tender response as shown below. Here the details of the response can be viewed, and detail of an individual section can be edited by clicking the Edit icon in the top right hand corner of each section.

Invitation To Tender Response Wizard Step 5 of 5 (Summary)
* Denotes Mandatory Step(s)

Step 1 (Tender Information) — Edit Step 1 (Tender Information)

Version:	1
My Reference:	ABC/1234
Tender Information:	N/A
Additional Comments:	N/A
Delivery Period:	N/A
Price(s) Firm Until:	N/A

Step (Specification Breakdown) — Edit Step (Specification Breakdown)

Description	Unit of Measure	Quantity	Currency	Comments	Unit Price	Sub Total
Educational Book	per Book	100000	£		£ 10.58	£ 1058000.00
Sports book	per Book	50000	£			
Fiction Book	per Book	250000	£			
					Grand Total	£ 1058000.00

Step 2 (Online Questions) — Edit Step 2 (Online Questions)

1.1 Standard Evaluation ITT

Step 3 (Attachments) — Edit Step 3 (Attachments)

There are currently 4 attachment(s) uploaded to your response

Attached/Link Name	Size	Date Uploaded
Chrysanthemum.jpg	858kb	03/05/2012
Desert.jpg	826kb	03/05/2012
Hydrangeas.jpg	581kb	03/05/2012
Jellyfish.jpg	757kb	03/05/2012

Step 4 (Terms & Conditions) — Edit Step 4 (Terms & Conditions)

Title
General

Accept Terms:	Yes

Options

Save As Draft   Submit Response

If you choose to edit a section you the options at the bottom of the screen will be "Save" or "Cancel", so to save the changes that you make click "Save" however to exit without saving any changes click on "Cancel". The only difference is that you will also see an "Add" button in the attachments section so more attachments can be added.

At the bottom of the tender response page there are 2 options, "Save as Draft" or "Submit Response"

If you do not want to submit this response now then click to "Save as Draft" and this will bring up the following prompt screen,

Save As Draft Confirmation
Confirmation

Message

Are you sure you **ONLY** wish to save your response as a draft?

By doing this you acknowledge that your response will **NOT** be submitted.

You can return and submit your response at anytime before the respond by date and time outlined on the ITT document

Click '**Save As Draft**' to continue saving and return to the ITT summary.

Click '**Cancel**' to return to your response summary.

Options

Save As Draft   Cancel

To confirm you are saving as draft only and are **NOT submitting** then click the "Save as Draft" button again, however to return to the previous screen click "Cancel".

By "Saving as Draft" this will return you to the tender summary screen, where it highlights this is saved only as a draft and not submitted. You will have to ensure the tender response is submitted at a later date, prior to the submission deadline, for it to be seen by the procuring organisation.

Submitting The Tender Response

If the tender has been saved as a draft and is now ready to be sent then click on View to open up the response summary (Also you can go through the response wizard again)

My Response   View Response

Status:	Draft (NOT SUBMITTED)
Version:	1
Intent To Respond:	Sent - 03/05/2012 11:22:31
Supplier Ref No:	ABC/1234

Options

Response Wizard   Opt Out   Finish

In the summary the detail of the response can be checked and changed if needed by clicking the edit button in the top right hand corner of the section.

When the tender is ready to be sent then click the "Submit Response" button from the options section at the bottom of the page.

This will then ask you to confirm you wish to submit your tender response.

Submission Confirmation
Confirmation

Message
Are you sure you wish to submit your response?
Once you have submitted your response you will receive an email confirming its receipt.
If you do not receive this email please contact support by clicking the 👤 icon located at the top right of the screen.

Options
Submit Response   Cancel

To confirm click "Submit Response" again, to go back to the previous screen click "Cancel"

This will return you to the Response Summary Page and here it can be seen from the status in the top right hand corner that the response has been published, and also when it was published. Click "Finish" to leave this page.

This will return you to the Opportunities screen and under Response Status it will now say Published along with the Time and Date this response was published.

Editing Tender Response

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 pass.

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 your "My Opportunities" section, then select the organisation you have been dealing with.

Now click on the 'Contract ID' of the opportunity you wish amend your response to

This will then open the 'Stage Detail' screen as shown, to access your response click on the 'Title' (shown in blue)

This then gives a summary of the tender where the information can be viewed and also the response to the tender can be viewed.

To view the tender response click on the "View" icon if you first want to check your response before you decide to edit it. From this screen click "Finish" at the bottom of the page to exit the tender response view and return to the previous page.

To edit your tender response click the "Edit Response" button from the bottom of the page in the options.

When this is clicked the following screen will appear asking you to confirm this as once this has been confirmed it cannot be reversed and another version will have to be submitted.

Click "Edit Response" to confirm and continue with this, or "Cancel" to abort the process and return to the previous page.

Note: When a response is being edited the procuring organisation will not know that this is the case. The previous version will stand until another response is submitted. This means the edit response process is started but the new version is not submitted before the response time and date then the previous version will be visible to them and this will stand.

Click Edit Response and this will return to the tender summary page as before, however the information in "My Response" has changed to show that another submission needs to be made. It is now in draft status again, the version number has gone up appropriately and the buttons in options have changed back to "Response Wizard", "Opt Out" and "Finish".

Due North DEV Primary - Invitation To Tender (ITT) - Amended

ITT Information   📁 View ITT

Contract Ref No:	DNCC-DEVA-8TXC6M
Contract Title:	Library Book
Ref No (Version):	ITT-DEVA-8TXCSR-2 (Version 2)
Title:	Library Book
Response Required By:	05/04/2012 12:30:00 PM
Attachments:	0
Amended:	03/05/2012 10:36:23
Amended Sections:	✘ Submission Information
	✘ General Information
	✘ Specification Breakdown
	✘ Terms & Conditions
	✔ Evaluation Criteria
	✘ Attachment(s)
Amendment Information:	Evaluation added

My Response   ✏ View Response

Status:	Draft (NOT SUBMITTED)
Version:	2
Supplier Ref No:	ABC/1234

Options

[Response Wizard] [Opt Out] [Finish]

To make the new submission as before there are two options, the response wizard or the "View" to edit a specific section.

Response Wizard This will behave as before, however now on each page of the wizard it will already have your previously submitted responses populated there. This allows you to make only the required changes without having to repopulate all the previously entered data. Work through the wizard as detailed earlier in the guide.

Viewing and Editing Response If you click to view your response you will see all the previously entered details that were submitted in the previous version. Here any section can be changed by clicking the link in the top right hand corner of the relevant section.

When the new response has been formulated and the required information has been changed then click on "Submit" to submit this to the procuring organisation and overwrite the previous submission.

A confirmation screen will come up explaining what will happen when the response has been made, and click "Submit Response" again to make the submission, or "Cancel" to go back.

Submission Confirmation
Confirmation

Message
Are you sure you wish to submit your response?
This submission (version 2) will replace your previous response (version 1) submitted 03/05/2012.
Once you have submitted your response you will receive an email confirming its receipt.
If you do not receive this email please contact support by clicking the icon located at the top right of the screen.

Options
Submit Response   Cancel

Once submitted you will be returned to the tender response page which shows details of your most recent response, as below.

One important point to note is the new section that has now appeared called Submission History on the right hand side of the screen.

Status

Version 2 submitted
03/05/2012 13:42:02

Submission History

Version	Edited
2	Currently Displayed
1	03/05/2012 13:40

This shows the version that you are currently viewing, in this case version two, and all the other versions previously submitted. To view an earlier version click on the corresponding version number and this will be displayed.

This process can be undertaken as many times as required, with the submissions being edited any number of times, providing the submission time and date have not passed. Once the submission time and date have passed the tender response can no longer be edited.

Tender Amendment and Resubmission

To view a contract log in and go to the 'My Opportunities' folder on the home page, select the

organisation you are dealing with and click on the [icon] icon, then click on the unique 'Contract ID' of the contract in question.

This will take you to the tender overview as usual, however in this instance the tender information section will look different due to the amendment that has been issued, as can be seen clearly in the following screenshot which highlights the amendment view.

To see the ITT Information click on the View icon in the top right hand corner of the section, this will take you to the tender summary screen.

The top section of the tender has now changed to show an "Amendment Information" section, with details of the amendment that has been made

The amended field shows the time and date this was done, in amended sections it highlights the sections that have changed, with those that have been changed marked with a blue tick ✔, those that have not been changed are marked with a red cross ✖. The description field shows a summary of the changes that have been made and may also say why this has changed for additional information.

In the top right hand corner of this Tender Summary screen there is an Amendment History section as shown below

This shows how many versions of the tender there have been (in this instance there have been two, the original and the amendment) and which version you are currently showing. The versions are shown in order, with the highest number being the most recent version.

To view a particular version click on the number in the Version column that you wish to view and it will display and in the amended column it will show which version is "Currently Displayed".

Click the "Finish" button from the options section at the bottom of the page to return to the overall summary screen, as shown below.

As shown in this example a response has already been made. This submission will REMAIN SUBMITTED and no further action is required if you do not wish to change your response. However if

the amendment is such that you feel you need to change your response and re submit then at the bottom of the screen there is an "Edit Response" option, as shown below.

By clicking to "Edit Response" then you will have to go through the submission process again to re submit, as shown in an earlier section of the help guide. To prevent any unnecessary rework the system will remember all detail of previous submissions so only the relevant sections will need to be changed

From the Amended Summary Tender screen you can click to view the tender response and change only the required sections

To change a section click on the "Edit" button in the top right hand corner of the corresponding section, this will open it and edit your response as detailed earlier, more details in the tender response section earlier in the guide.

Once the required changes have been made click "Save as Draft" to save and submit later, or if it is complete then click "Submit Response" to make the submission.

From the Amended Tender Summary Screen it is also possible to use the "Response Wizard" to complete your tender resubmission, click the "Response Button" button to enter the wizard.

This will return you to the tender information screen, where the My Response section will have changed to reflect the fact the tender has been submitted to the procuring organisation.

How to Archive a Past Opportunity
Background

The opportunities portal area will show all of the PQQ's, ITT's, RFQ's and also Auctions that your company is currently involved with, with the current status of the response shown under the "Response Status" column. However in order to keep this screen up to date, and manageable, then there is an ability for opportunities to be archived once they have been dealt with and the submission window has passed.

The screen below is a sample screen of the opportunity portal for a supplier who has been involved in contracts on the portal. The contract "User Guide Contract" has been responded to, and now it

should be archived, so that it no longer shows in the current opportunities area. Click on the Contract ID to view the opportunity you want to archive

This will open the Supplier dashboard, where the details and also the response details can all be viewed. Notice in the options there are now only two buttons.

To archive the contract and ALL of the stages simply click on 'Archive Contract'.

Viewing Archived Opportunities

This will then return you to the current opportunities page, and as shown below, the exercise that was just archived no longer appears here. To view the archive of previous opportunities, click on "View Archive Opportunities" located on the right hand side of the screen, in the Archive section

This will open the archived opportunities screen, as shown below, notice that the right hand side section is now called Active, with the option to "View Current Opportunities". Clicking this will return you to the current opportunities view.

Contract Title	Contract ID	Received Date	
Company Cars	DEVA-8TXC56	03/05/2012	
Library Book	DEVA-8TXC6M	03/05/2012	
Stationary	DEVA-8TXC5Y	03/05/2012	

Organisations: Please Select

Due North DEV Primary Opportunities

Now when viewing the exercise, the options at the bottom of the page are "Activate" and "Finish". To move this back into the current opportunities view, click the "Activate" button.

Contract: Library Book (DEVA-8TXC6M)

Stage Please Select

<< **Library Book (ITT)** >>

Stage Detail

Title	Reference	Respond By	Response Status
Library Book (ITT)	ITT-DEVA-8TXCSR-2	04/05/2012 12:30:00	Version 2 submitted - 03/05/2012 13:42:02 (Version 3 Draft)

Stage Options

View Stage Detail   Retrieve Contract   Close

Archiving Rules

An opportunity cannot be archived within the portal until the "Response Required By" / "Respond By" date and time have passed, as until this date and time have passed the opportunity is still classed as active.

This shows the response page for this exercise, however in the options the "Archive" button is not currently there. It will not appear in the options until the "Response Required By" time and date have passed, and this is to ensure that an opportunity is not archived until the chance to respond has passed.