

8over8® ProCon™ 2014 Instructions to Tender Online

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1. About This Guide

ProCon Version

This guide applies to 8over8® ProCon™ 2014 FP5.

Audience

This document is intended for:

Contractors

Additional References

N/A

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Document Conventions

The following conventions are used in this document.

Formatting	Description
Bold	Name of option, check box, menu, field, etc.
Italic	Name of menu option Emphasis Application messages, error messages, etc. Other reference documents
Fixed Font	Command prompt input Code sample
Italic Dark Blue	File or folder name Registry key
Italic Blue	Hyperlink to another section in this document

2. ProCon Access & Navigation

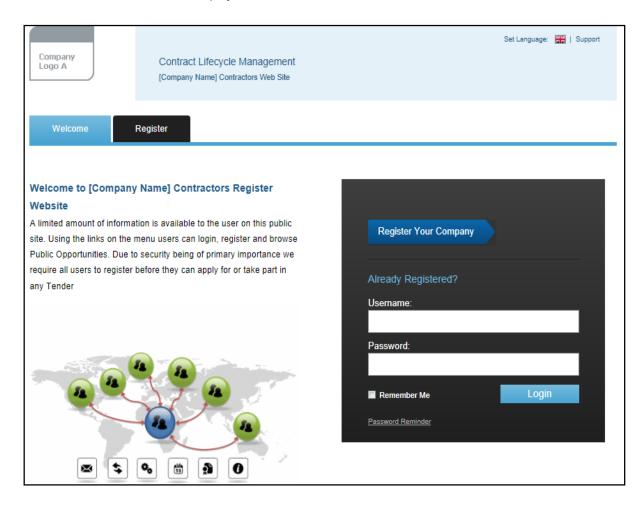
2.1. Logging on to ProCon

This section will explain how to access and find your way around ProCon to allow you to work comfortably within the system.

You will receive your **username** and **password** in an e-mail from COMPANY.

To log onto to the Contractor Portal:

- 1. Start your Microsoft Internet Explorer browser
- 2. Enter https://DOMAIN.com into the browser address bar Your browser window should now display as illustrated below:



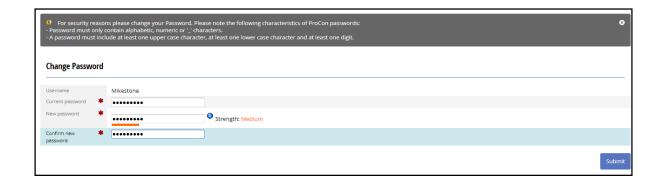
- 3. Enter your ProCon Username and Password
- 4. Click the Login button



Note: Your ProCon Password is case sensitive.

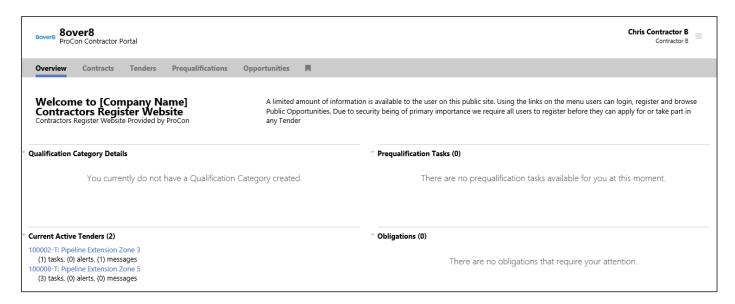
The first time you logon you will be required to change your password.

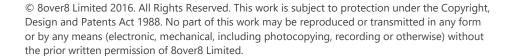
Password must contain between eight and fifty characters. These characters must include at least one uppercase character, one lowercase character and one digit.



Warning: Your ProCon account will be disabled after 3 unsuccessful logon attempts. If this happens please send an email support@companyname.com requesting your account be reset. You will be sent an email with a link to a ProCon webpage on which you can set a new password.

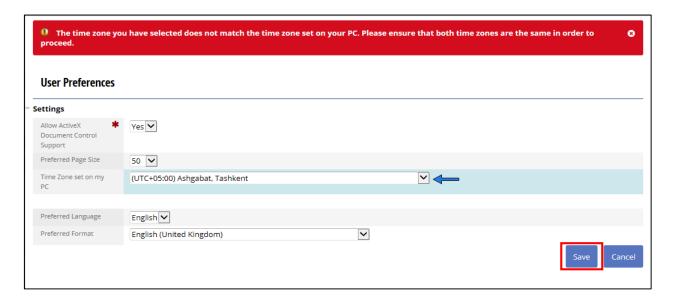
5. If you have logged in before you should now see a page similar to the one illustrated below. Congratulations you are now successfully logged into ProCon and are ready to proceed.



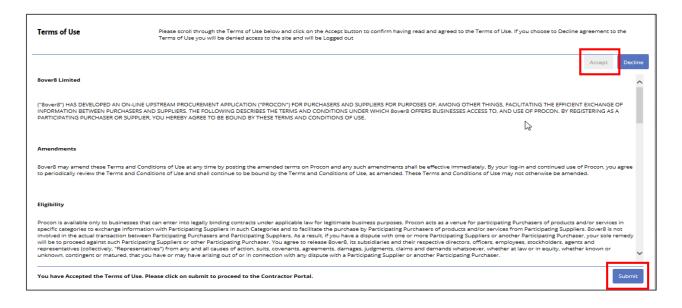




6. If the time zone you are in is not the same as the one recorded against your user details you will be prompted to update your time zone settings to match that of your computer. Make the necessary changes and click Save.

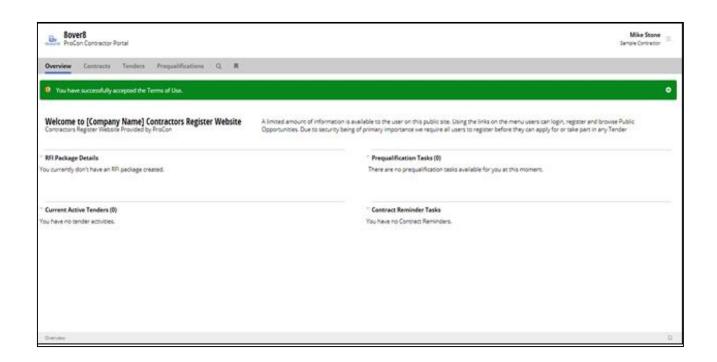


7. If this is your first time logging onto ProCon, you will now see a page similar to the one illustrated below. If you wish to proceed you need to accept the Terms of Use by clicking the accept button and then click the Submit button.



8. Once you have accepted the Terms and conditions and adjusted your time zone you will see a page similar to that illustrated below:





2.2. Incorrect Username or Password

If you enter an incorrect password you will receive the following error:

"The login credentials you have entered may be invalid or your account may have been locked out. If you require assistance please contact ProCon Support."

2.3. Account Disabled

If your account has been disabled you will receive the following error:

"The login credentials you have entered may be invalid or your account may have been locked out. If you require assistance please contact ProCon Support."

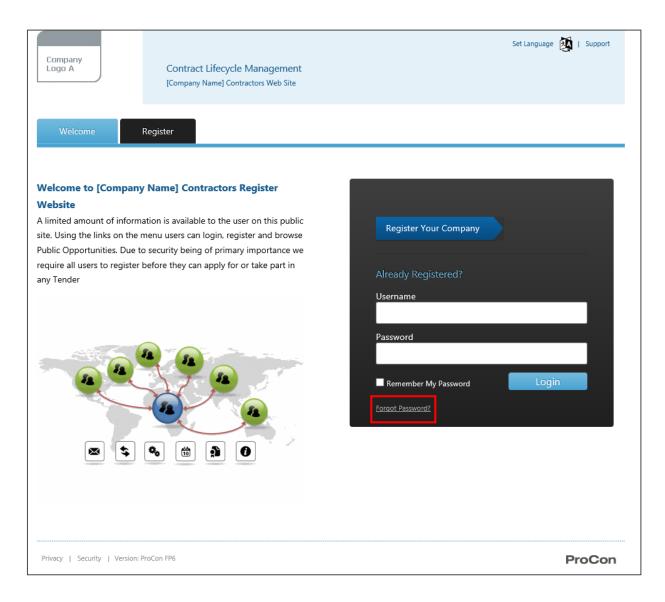
Your account can be disabled due to the following reasons:

- A user attempting to logon with an incorrect password more than 3 times. This is a security feature to prevent a "dictionary attack" to gain access to your account.
- If your account has been manually disabled by a colleague who is the Primary Contact or by a ProCon Administrator.



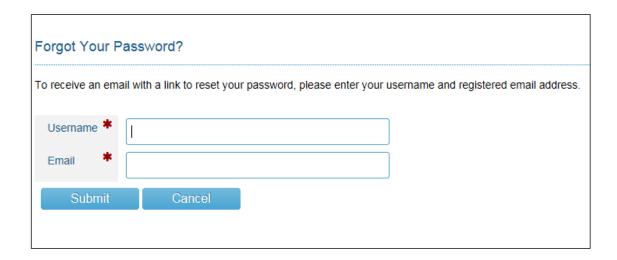
2.4. If you have forgotten your password

If you have forgotten your password:

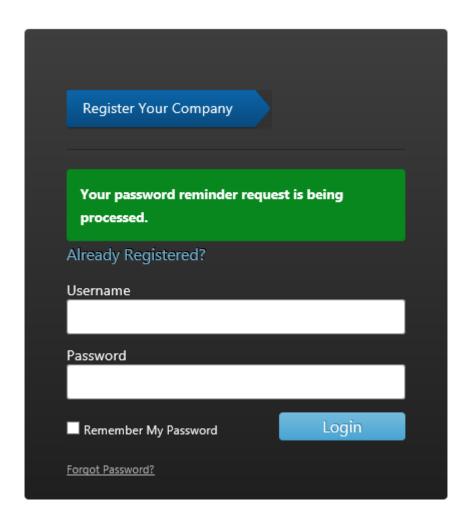


- 1. Click the 'Forget Password?' link on the login screen.
- 2. Enter your Username and Email address.





3. Click Submit. A confirmation message will be displayed as illustrated below:



4. You will be sent an email with a link to a ProCon webpage on which you can set a new password.

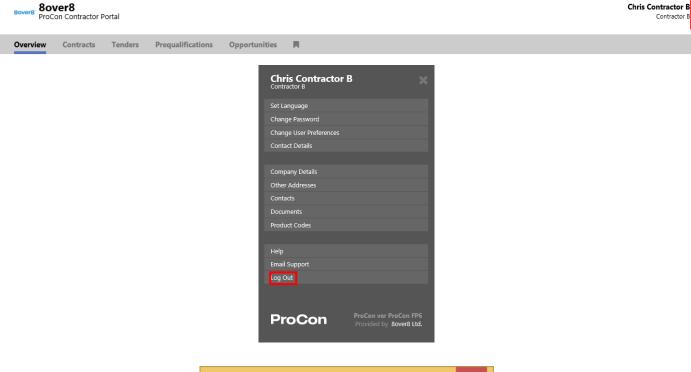


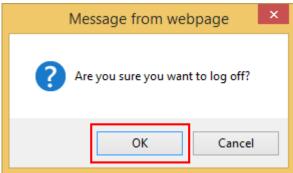
Note: If you forget your Username please send an email to support@companyname.com

2.5. Logging in with a different username

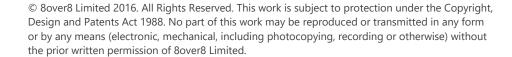
To log on with a different user name:

Click the 'Display User Menu link' and click the 'Log Off' Link from the drop-down menu.
 A warning message is displayed





Click OK The Logon page is displayed





3. Navigation Within ProCon

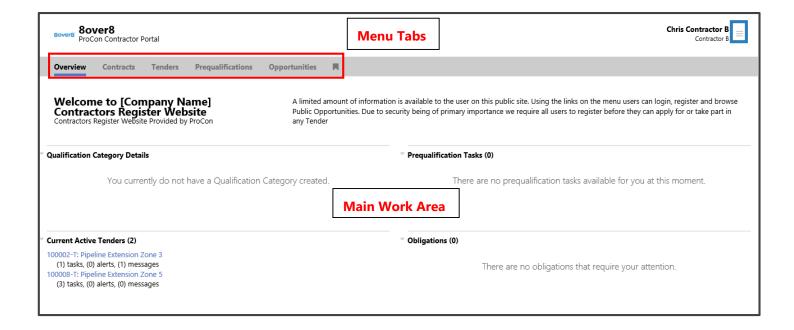
3.1. ProCon Menu

This section will explain how you move from one module of ProCon to another in order to access key functional areas, how to initiate actions and maintain your navigation trail.

Your ProCon interface has a number of important areas as illustrated below:-

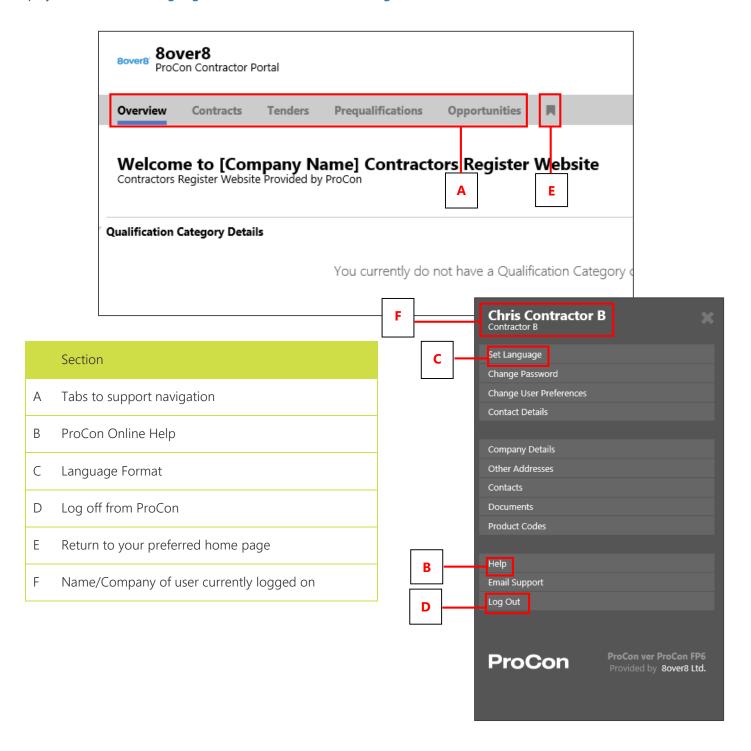
The **Menu Tabs** provide you with the ability to move quickly to the area of ProCon in which you wish to work.

The **Main Work Area** makes up the largest part of your ProCon interface and contains the key dynamic information relating to the subject area you are working on. This is the area where you will interact most with ProCon.





ProCon header tabs A & E links are displayed at all times as illustrated below. Sections B, C, D & F are accessed from the 'Display User Menu Link' *Highlighted in Blue in the above image*.





ProCon uses Menu Tabs to enable you to easily move from one module of ProCon to another. This is achieved by simply clicking on the menu tab corresponding to the module/area of ProCon you wish to access.

Clicking on a tab will highlight the chosen tab and change the view in your Main Work Area to the home page of the ProCon module as illustrated in the screen below:



3.2. **Accessing ProCon Online Help**

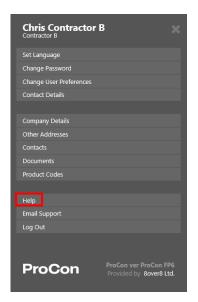
ProCon's Online Help functionality is available on your ProCon user menu. This provides you with step-by-step instructions for carrying out tasks in all areas of ProCon. ProCon Online Help is Context Sensitive. When a user accesses the ProCon Online Help, the ProCon Online Help opens at a topic relating to the action the user is trying to perform.

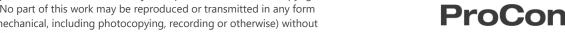
To access ProCon Online Help:

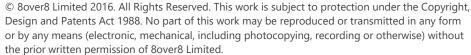
1. Click the 'Display User Menu Link' highlighted below to open the menu:



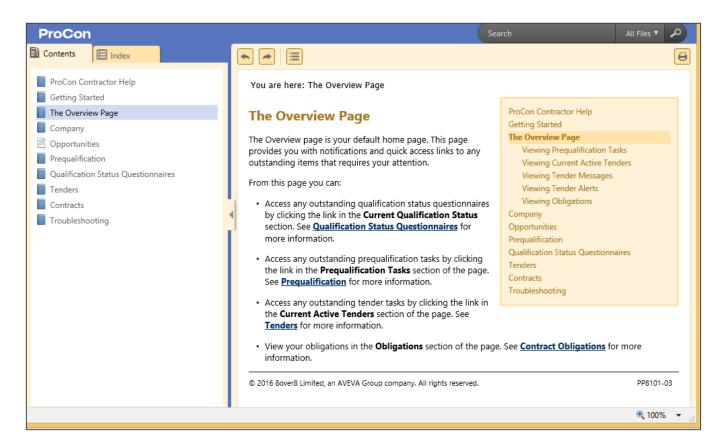
Click the highlighted 'Help' link:







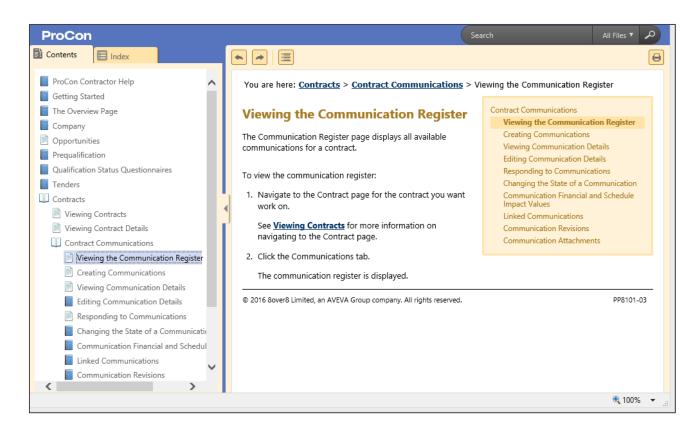
3. You will be presented with a new browser window containing the ProCon Online Help content as illustrated below:



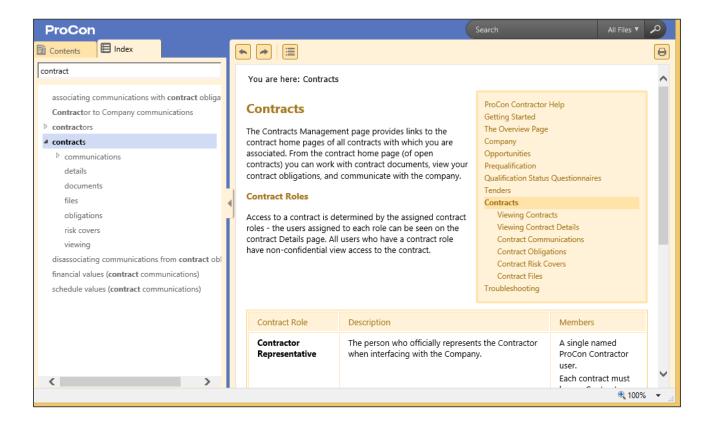
4. The Contents link in the top left hand corner of the ProCon Online Help window displays all ProCon Online Help areas available

This will present you with a view containing the subject down the left-hand side, and a main area to display the ProCon Online Help on the right





5. The 'Index Tabbed Page' allows you search for ProCon Online Help on a particular word or phrase. A list of related topics will be displayed.

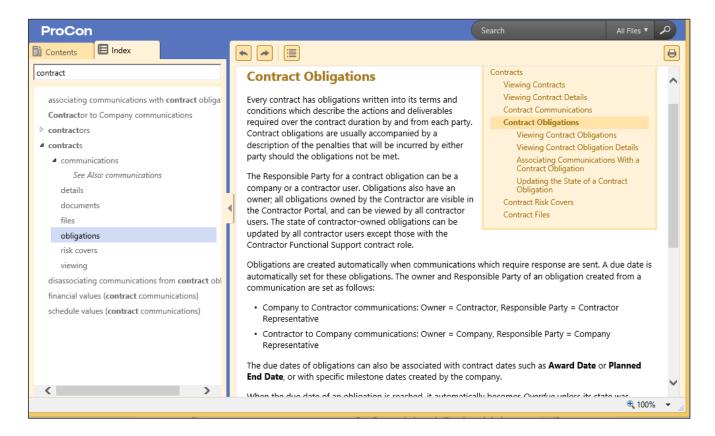


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6. By clicking on any of the links displayed, detailed step-by-step instructions will be displayed in the right pane.



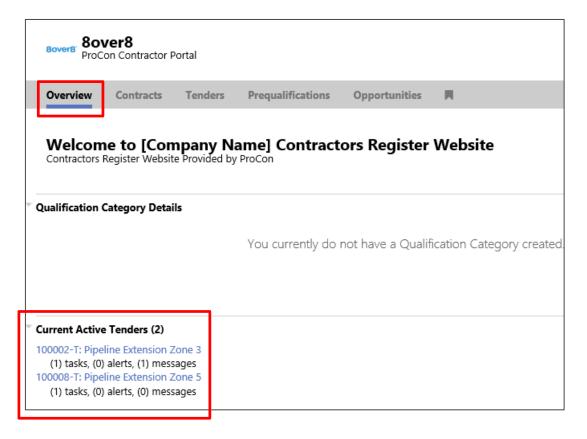
3.3. Accessing Available Tenders

To access your tender(s) login to ProCon.

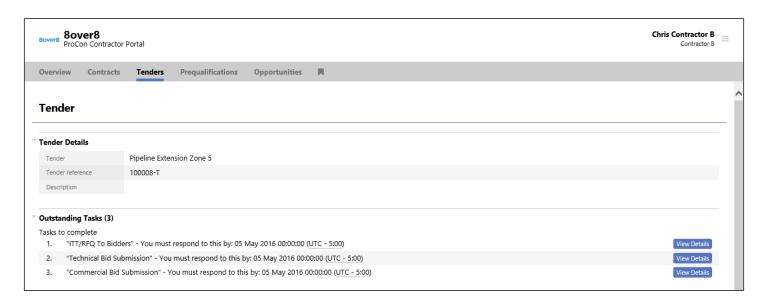
By default when you login to ProCon the **Overview** page is displayed. If not it means you have changed your homepage to another page, in this case simply click on the **Overview** tab to access the **Overview** page.

Active Tender(s) are listed under the **Current Active Tenders**.





Clicking a Tender link under **Current Active Tenders** will bring you to the Tender page.



Under the **Outstanding Tasks** section may be tasks to complete. In this example:

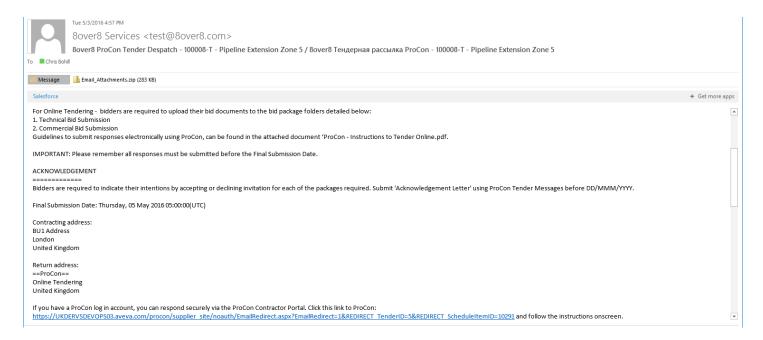
- 1. The first task "ITT/RFQ to Bidders" will allow you to download the Tender Pack, if you haven't already received it.
- 2. The second task allows you to acknowledge that you plan to submit technical documentation and then submit the documentation before the submission deadline.



3. The third task allows you to acknowledge that you plan to submit commercial documentation and then submit the documentation before the submission deadline.

4. Receiving and Viewing a Tender Invitation

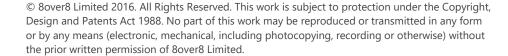
You will first be notified of the invitation to tender via an email. This will be sent to your standard email Inbox.



Note: Only the nominated Single point of contact for COMPANY will receive the tender invitation from COMPANY.

The email provides the following information

Tender Details	The Tender Reference & Tender Name
General Info	General Tender Information
Final Submission Date	The date and time at which submission of tender responses needs be completed. No submissions will be taken after this date and time.
Contracting Address	This is the address pertaining to the organisation or department whom the eventual bidder awarded the contract will be contracted with

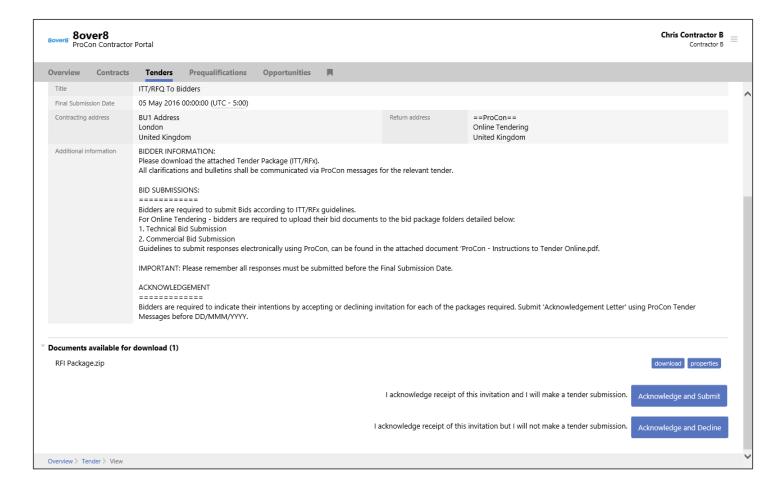




Return Address	The Return Address is to be used only if advised by COMPANY tender administrator to submit non-electronic bids. Late tenders will not be considered.
Hyperlink to Response Area within ProCon	Clicking on this link will take you to the log on screen where you can download the tender documents.

5. Obtaining Tender Documents

When you receive an ITT/RFx message follow the link in the email (Previous Step) and log onto the website. You will be brought to the **View Despatch** screen. You are now looking at the despatched Invitation to Tender from COMPANY.





You can download the tender documentation by clicking on the 'download' link. This will open the documentation and allow you to save to your PC.



Note: The tender documentation will appear in a pop-up window. Please remember this if you are using pop-up blocking software.

If you have any difficulty in downloading the documents, please read the Troubleshooting section of this document.

After downloading the documents and deciding whether you will respond to the Tender Invitation, creating your response documents, please follow the instructions in Section 6.

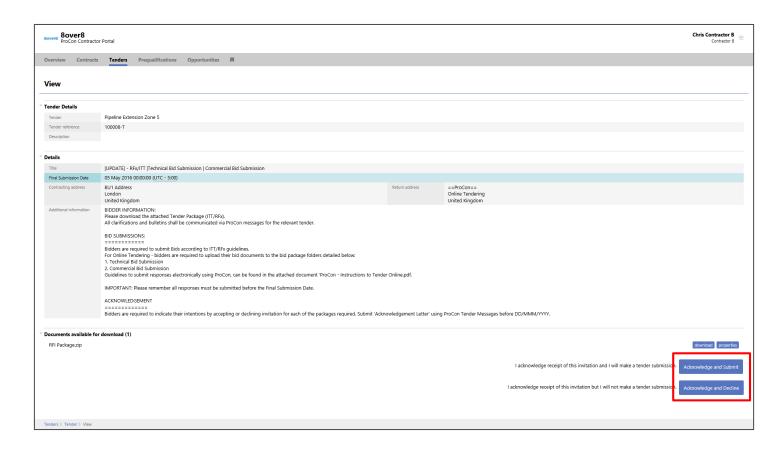
6. How to Respond Electronically to an Invitation

To respond to the invitation electronically follow the link at the bottom of the Technical or Commercial Tender invitation email you received from COMPANY and login into ProCon. Once you are logged on you will be taken to the Invitation to Tender.

Or alternatively follow the process outlined in section 3.3 of this document and click the relevant "View Details" button on the Tender section. This will bring to the page shown below:







Initially you will be provided with two options "Acknowledge and Submit" and "Acknowledge and Decline".



6.1. How to Acknowledge and Agree to Submit

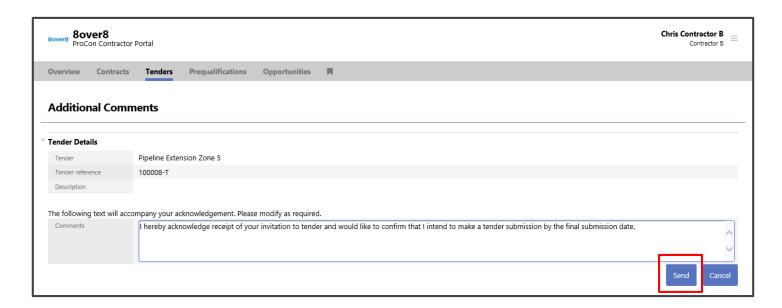
Acknowledge and Submit – Select this option so that you can submit a tender response. This will acknowledge your receipt of the invitation and your intention to make a bid submission.

Note: You can also submit your bids at a later date.

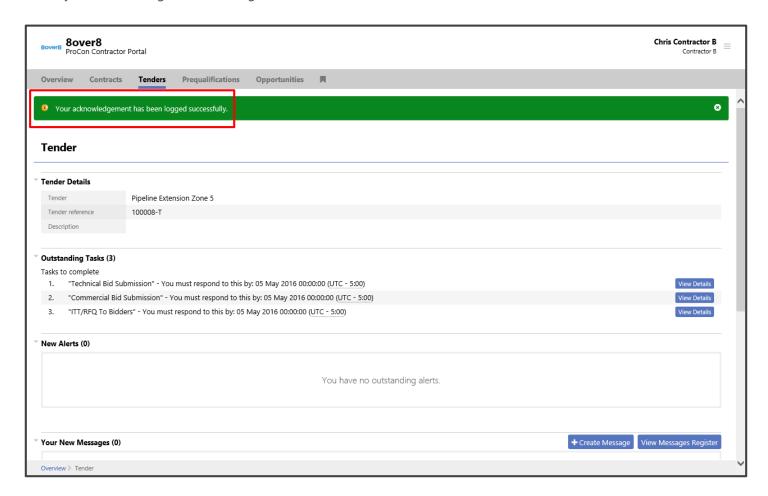
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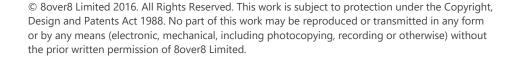






When you agree to submit a bid by clicking **Send** in the above page the system takes you back to the **Tender** page and shows your acknowledgement as being **successful**.

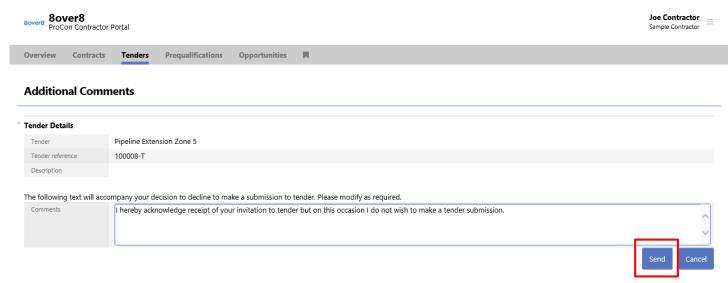




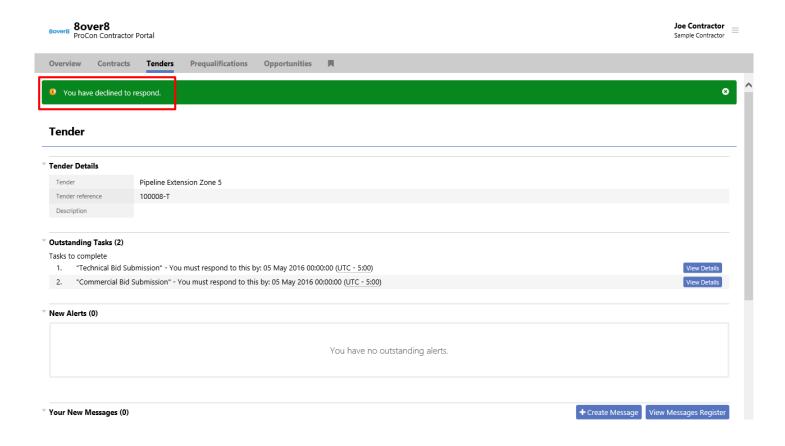


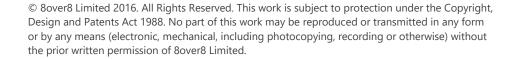
6.2. How to Acknowledge and Decline to Submit

Acknowledge and Decline – Select this option if you wish to withdraw from the tendering process.



When you decline to submit a bid by clicking **Send** in the above page the system takes you back to the **Tender** page and shows that you are declining to take part in the tender.



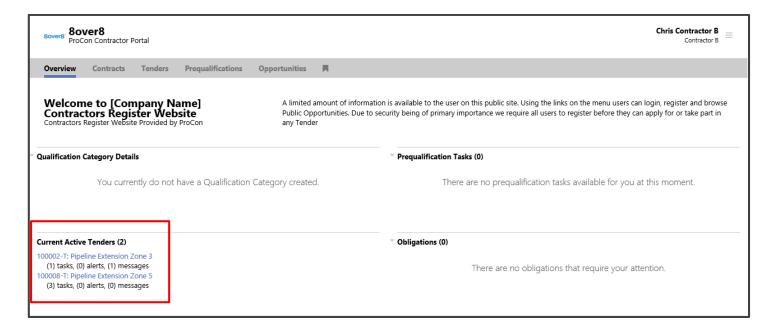




7. How to Raise Clarification Requests / Tender Messages

7.1. Log into ProCon

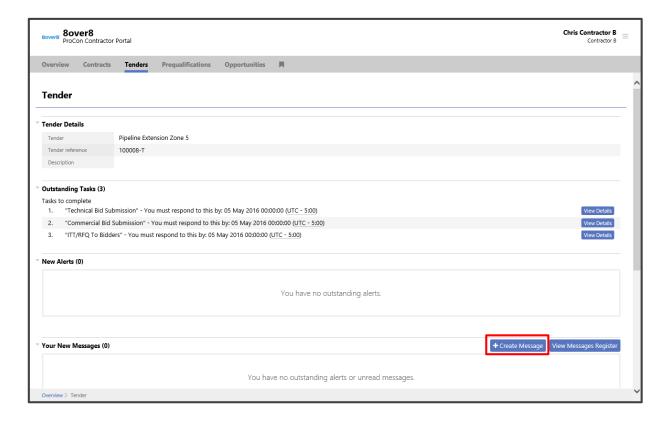
Log into ProCon with the username and password sent to you via email. Once logged in, you will be taken to the **overview** page of ProCon which shows all tenders relevant to your company.



1. Choose the tender

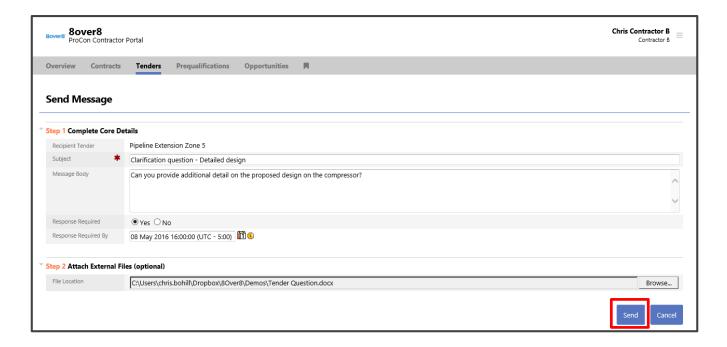
Under the **Current Active Tenders** section select the tender which you would like to send a message by clicking on the tender name hyperlink. You will be directed to the tender page. Click on the **Create Message** hyperlink to create a message.

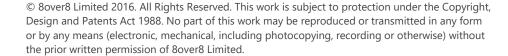




2. Compose the tender message and send the message

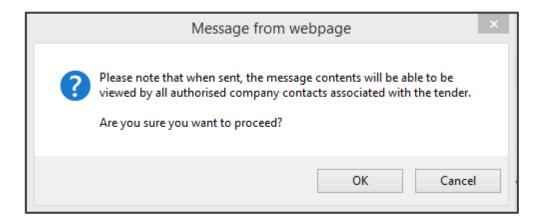
Complete the details of the message as required, attach documents if necessary, and click the **Send** button to send the message along with any attached files.



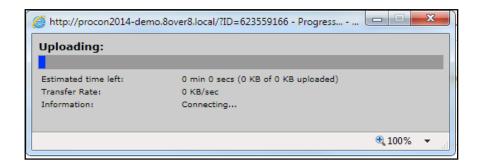




After clicking the **Send** button a popup message will appear click the **OK** button to confirm you wish to proceed.

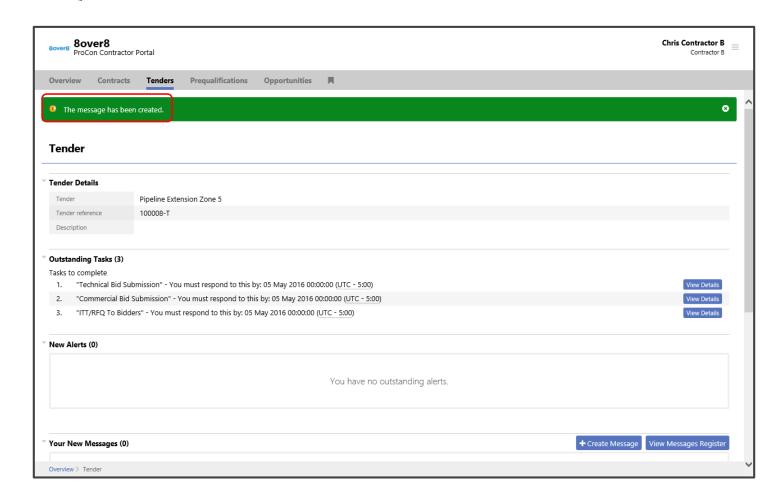


If you attached a file to the tender message you will see a process bar showing you the file being uploaded into ProCon.



When the message has been successfully sent you will be returned to the **Tender** Page.





3. View messages

Recent messages appear on the Tender page under the **View Messages Register** section. To access a message click on the **Subject** hyperlink (underlined in blue).



You can also use the messages register to view all previously sent and received messages. The register is available from the **Tender** page; Click the **view Messages Register** hyperlink to go to the message register. By default the **Received** messages are shown.



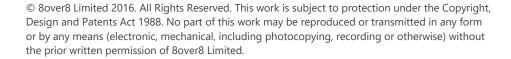


- Messages requiring a response have a red exclamation icon
- Messages that have not been marked as read have a closed envelope icon ■
- Messages that have been marked as read have an open envelope icon
- Messages that have and attachment have a paper clip icon

To view message that you have sent to COMPANY choose **Sent** from the drop down menu.



Note: If the message you sent has been read the letter icon will be shown as





8. How to View Tender Messages Sent From COMPANY

When supplementary tendering material in the form of tender messages has been issued, you will receive an email alert with a link attached like the one shown below:

ProCon Tender Message - 4600004006 - Sample Tender

ProCon <Procon2014-ddemo@8over8.com>

Sent: Fri 15/03/2013 11:48 To: Brian McAfee

Tender Name: Sample Tender / Tender Reference: TND000001

Message Subject: Addendum 0001

Response Required: Yes

Response Required By: Monday 10th February 2014 18:00:00(UTC)

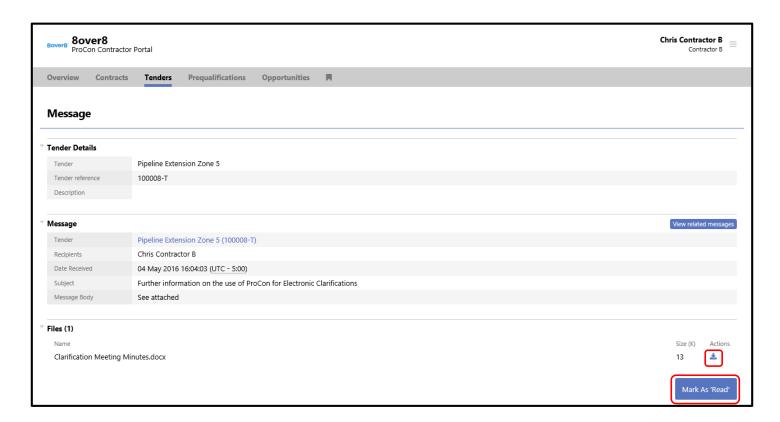
To view this message and any attachments, please click this link to ProCon:

https://procon-staging.8over8-demo.com/procon/supplier

Site/noauth/supplier/publicSupplierLanding.aspx?EmailRedirect=6&REDIRECT MessageID-42

To view this material, click the link within the message body. You will be prompted to login to ProCon and then automatically directed to the message and any documentation attached. You should always acknowledge receipt of messages by clicking the 'Mark as Read' button shown below:





If you have any issues downloading files using the download link shown above please refer to section 10. "Troubleshooting".

Note: You can open and save attachments using the download icon ^{**}

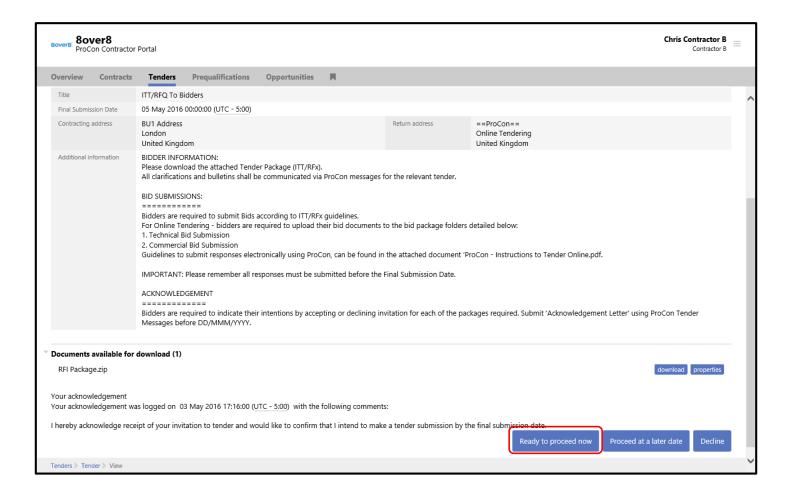


9. How to Submit Tender Responses Electronically

When you are ready to submit your bid response document(s) follow the link at the bottom of the Tender Invitation email and login into ProCon. Once you are logged on you will be taken to the Tender Invitation Response Area.

Alternatively follow the process outlined in section 3.3 of this document. This will bring to the page shown below:

1. Select the **Ready to Proceed** button:





You will now be requested to upload any documents you wish to submit as part of your response. Select the Yes button to upload these documents.



Note: You can save your submission at any point up to the Final Submission date. This will store your response documents for you to work on up until the point that you are ready to submit these documents.

3. Select the Browse button to locate the document to be uploaded, and enter a name for the document. Once selected, click on Save to upload.

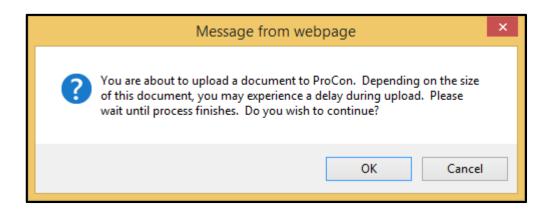




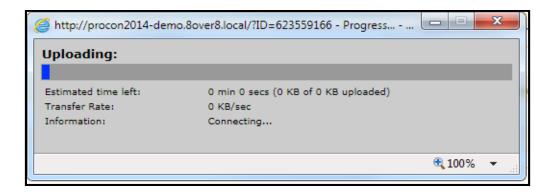
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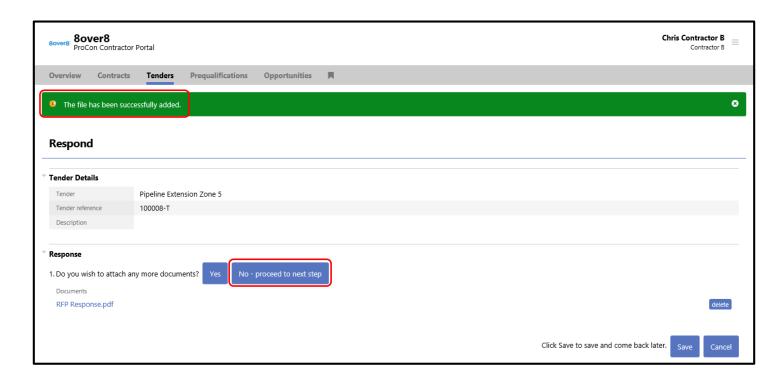


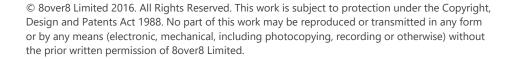


4. The document will now be uploaded. Repeat to add any other documents to your response.



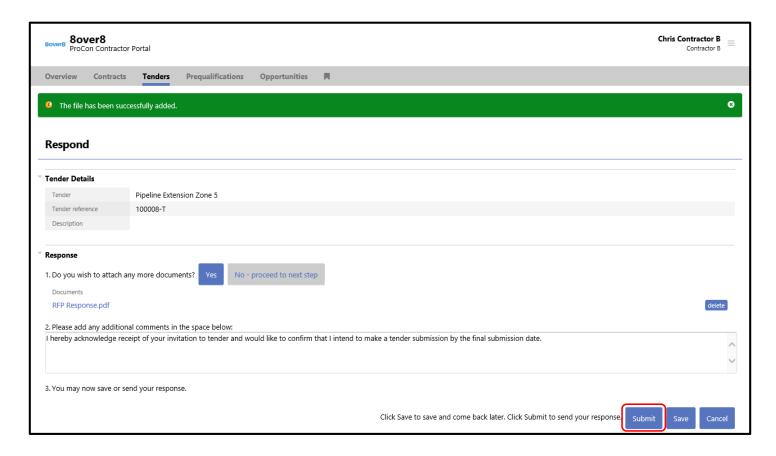
5. Once you have added all your documents and completed your response, select the 'No, proceed to next step' button.

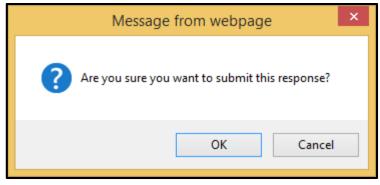






6. To **send your bid** response click on the **Submit** button. You will be prompted to confirm submission.

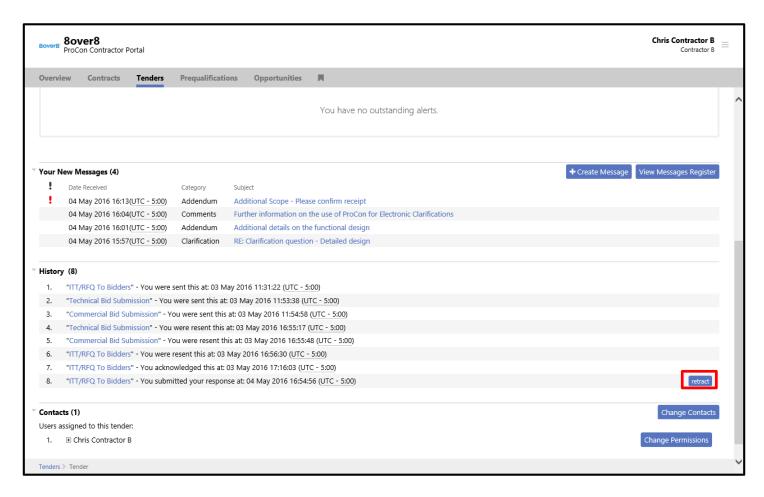






7. Your tender submission is now complete. You can view your submission documents at any time from the Tender History area of the Tender Summary Screen shown above.

If you need to retract your submission click the **retract** button.



Note: A Response Submission can be retracted until the Final Submission Date has passed. This will allow you to change the response given. If a submission has been retracted COMPANY will assume that you have made no response to the invitation until the response is re-submitted.



10. Troubleshooting

This section contains troubleshooting procedures for the bidders based on the usage of ProCon contractor portal.

ProCon users sometimes may encounter problems when downloading files. The probable reasons for the occurrence of such problems can be attributed to the configuration settings of the Internet browser. The following are the most common issues and their possible solutions.

10.1. For Problems Relating to Pop-Up Blockers

Windows adds a feature to Internet Explorer that gives it a built in pop-up blocker, a tool that prevents unwanted windows from popping up while you're browsing the web.

If this creates a problem with downloading files from ProCon, follow these steps to troubleshoot the problem.

- 1. Open an **Internet Explorer** browser
- 2. Go to Tools, then Pop-up Blocker, then select Pop-up Blocker Settings.
- 3. If you want to see pop-up windows from a specific web site, type the address (or URL) of this web site in the text area **Address of Web site to allow box**, and then click Add.

To allow pop-ups from ProCon, add the ProCon web site you are accessing e.g. 'https://procon.DOMAIN.com/' to this list.

You can temporarily allow pop-ups from a site by clicking on the Information Bar when Internet Explorer tells you that a pop-up has been blocked. Then click on 'Temporarily Allow Pop-ups', and the site will work normally for this session, until you close and restart Internet Explorer.

10.2. Pop-Up Blockers

You may have a third party Pop-up Blocker installed on your PC. ProCon uses a pop-up window to start downloading documents to your PC. You should set your Pop-up Blocker to allow pop-up windows to be launched by ProCon site (i.e. 'https://procon.DOMAIN.com/')

10.3. Always Prompt to Save Downloads From Your Browser

ProCon downloads documents to your PC by opening a pop-up window. Depending on your browser settings, you may be prompted to Open or Save the document.

Best practice is to always Save the documents to a folder on your hard disk when prompted and then view the documents by opening them on your PC.



If you select Open, the document will be saved to a temporary directory on your PC and opened in a new Pop-up window. Before closing the pop-up window you should use the Save option on the File menu to save the document to a proper location on your PC.

To ensure you are always prompted to Save downloads, set the following settings in your browser.

- 1. Internet Explorer: Using the Tools menu, select Internet Options, Security, Custom Level
- 2. Scroll down to the Downloads section and ensure that:
 - a. Automatic prompting for file downloads is set to 'Enable'.
 - b. File download is set to 'Enable'.
- 3. Click OK to close the Security Settings window.
- 4. Click OK to close the Internet Options window and apply your settings.

10.4. Not Prompted to Specify the Download Directory

To get the download dialog box, enable the "confirm open after download" option for that file type:

- 1. Open Windows Explorer
- 2. Then click [Tools] [Folder Options] [File Types]
- 3. Scroll down to locate the file type.
- 4. Highlight the file type (example: "PPT Microsoft PowerPoint Presentation")
- 5. Click the "Advanced" button.
- 6. Enable the option "confirm open after download"

10.5. File Download – Enable "Always Ask Before Opening this File Type"

To get the download dialog box, enable the "confirm open after download" option for that file type:

Windows XP

- 1. Open Windows Explorer
- 2. Then click [Tools] [Folder Options] [File Types]
- 3. Scroll down to locate the file type (e.g. *.ppt).
- 4. Highlight the file type (example:"PPT Microsoft PowerPoint Presentation")
- 5. Click the "Advanced" button.
- 6. Click **OK** or Cancel

Note: This resets the Registry entry for this setting, thus, enabling user the option to select 'Always Ask before opening this file type'.

