

ProContract User Guide

Lincolnshire County Council Transport DPS

Supplier Guide

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1.0 Log in to ProContract

- 1.1 Go to the ProContract website <https://procontract.due-north.com/Login> . If you have not already registered, please see Appendix A for details of how to register.
- 1.2 Enter your username and password, and click the green **Continue** button.

Log In

User Name

Password

[Forgotten your username or password?](#)

- 1.3 This should take you to the home screen of ProContract

proactis

Home Find opportunities My activities My contracts Help

Home All opportunities Search

Home page

Activities View full screen

Active Recently added Last viewed

-- Please select -- Go Search Go

Please select a buyer from the dropdown and click on the 'Go' button

Opportunities Find opportunities

To search and view all of the latest opportunities available on the Proactis portal, please click on the 'Find opportunities' link above

Company details summary Edit

supplier_housing_57 company
supplier_housing_57 Line 1, Line 2, Town, Northumberland, NE23 1LZ

Description
supplier_housing_57 company
Keywords
cars

Vendor profile

The questionnaires listed below contain common question sets used nationally by buying organisations. Questionnaires may be relevant to your business area so please read the description by hovering over the help icons.

- Standard Selection Questionnaire (SQ) Edit (0% complete)
- Test Vendor Profile Edit (0% complete)

Workgroups

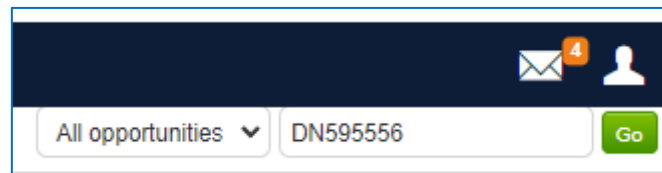
Activities are assigned to workgroups allowing all contacts within a workgroup to work on the activities together

supplier_housing_57 workgroup (1) Request merge

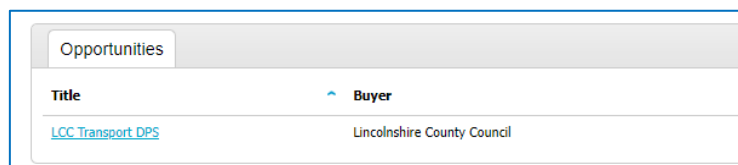
Training (1) Request merge

2.0 Finding the LCC Transport DPS for the first time.

- 2.1 This section details how to find the LCC Transport DPS for the first time only. If you have already looked at this project on a previous occasion, please refer to **Section 3, Returning to the Transport DPS Project**
- 2.2 The easiest way to find the Transport DPS project, is to type the reference **DN595556** in the search bar at the top right of the screen, and click the green **Go** button.



- 2.3 The project will be shown in the opportunities section (middle of screen). If you cannot see the project, ensure you have typed the reference number correctly, or try searching for the title **LCC Transport DPS**. If you still cannot find the project, refer to section 3 for other ways to find the project.

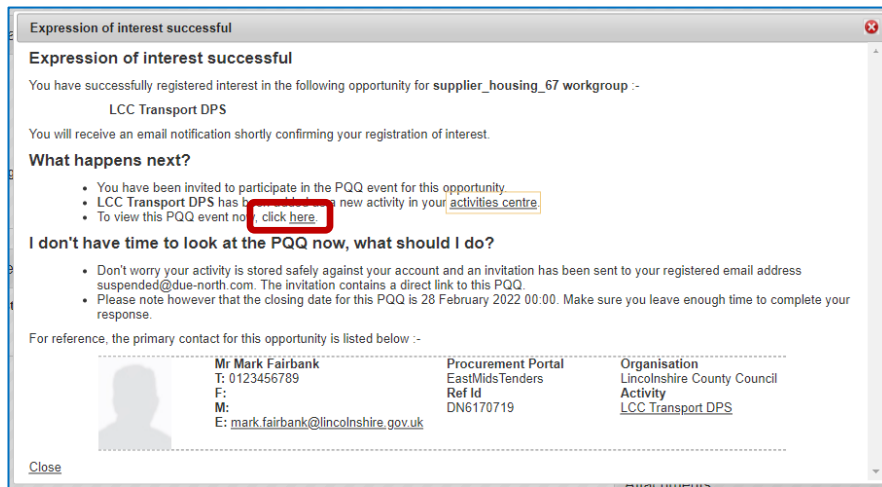


- 2.4 Click the project title (**LCC Transport DPS** in blue text).
- 2.5 On the next screen you will see a summary of the project. To get started click the green button - **Register interest in this opportunity**.

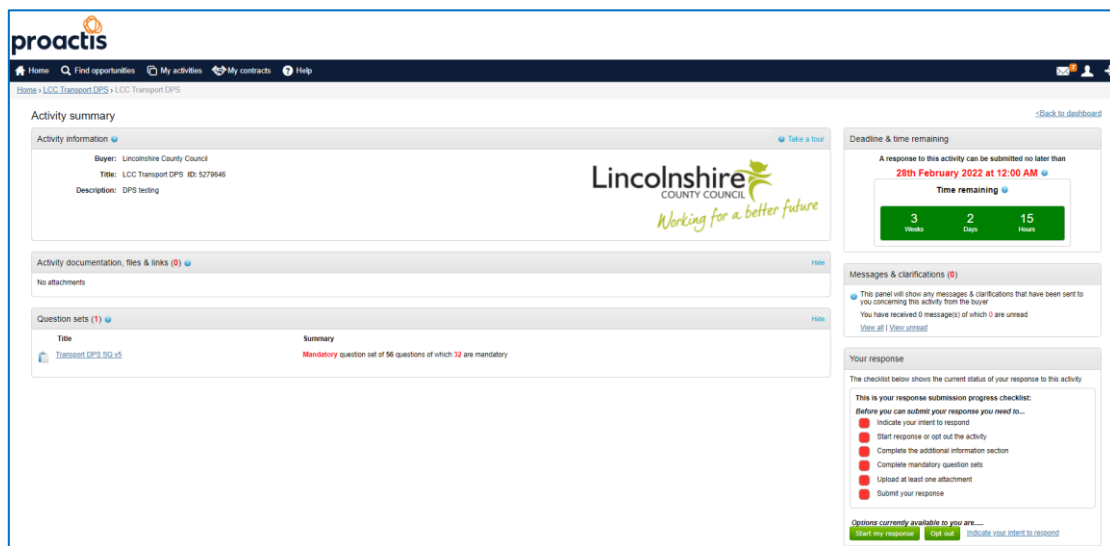
LCC Transport DPS

Main contract details Opportunity Id: DN6170719 Title: LCC Transport DPS Categories: 03000000-1 - Agricultural, farming, fishing, forestry and related products Description: DPS testing Region(s) of supply: UNITED KINGDOM Estimated value: N/A Keywords: Transport	Expression of interest window From 04/02/2000 08:30 to 28/02/2022 02:30 Register interest in this opportunity
Key dates Estimated contract dates Start date: 03/08/2022 End date: 03/08/2022	Contact details Buyer: Lincolnshire County Council Contact: Mark Fairbank Email: mark.fairbank@lincolnshire.gov.uk Telephone: 0123456789 Address: County Offices, Lincoln, Lincolnshire, LN1 1YL, United Kingdom
	Attachments No attachments

2.6 The next page has a lot of information on it, but all you need to do is click the **Click here** link in the middle of the screen (circled in red below)



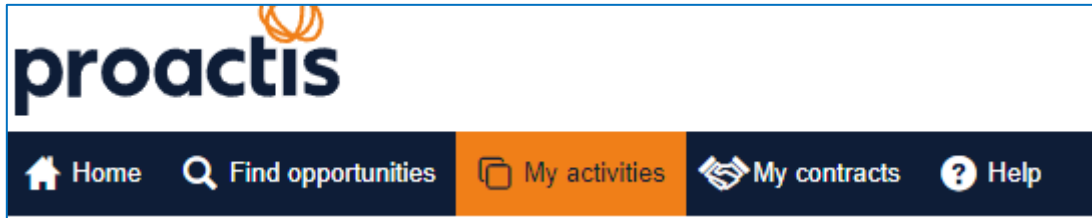
2.7 The next screen is the **Activity Summary** page.



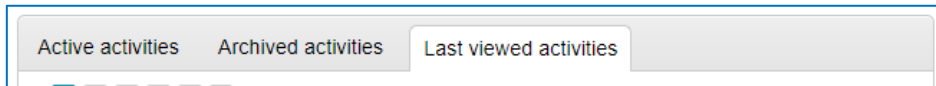
2.8 Refer to section 4, for how to complete and submit the questionnaire.

3.0 Returning to the LCC Transport DPS Project

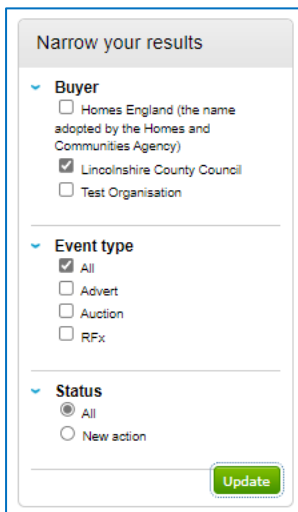
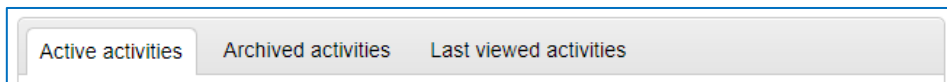
- 3.1 If you have already viewed the LCC Transport DPS on a previous occasion, please use the following steps to get back to the project.
- 3.2 Log in to ProContract as detailed in section 1.
- 3.3 Using the menu bar towards the top of the screen, select **My Activities**.



- 3.4.1 On the new page, click to select the **Last viewed activities** tab. The **LCC Transport DPS** project should be visible towards the top of the list. If it is not in the list, see 3.4.2 below.



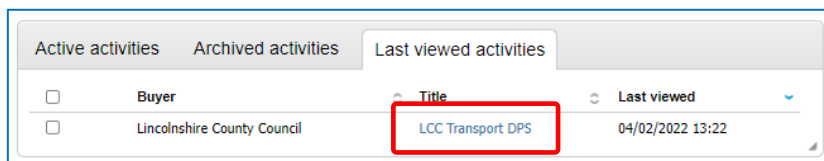
- 3.4.2 If the project is not shown on the **Last viewed activities** tab, click on the **Active activities** tab.



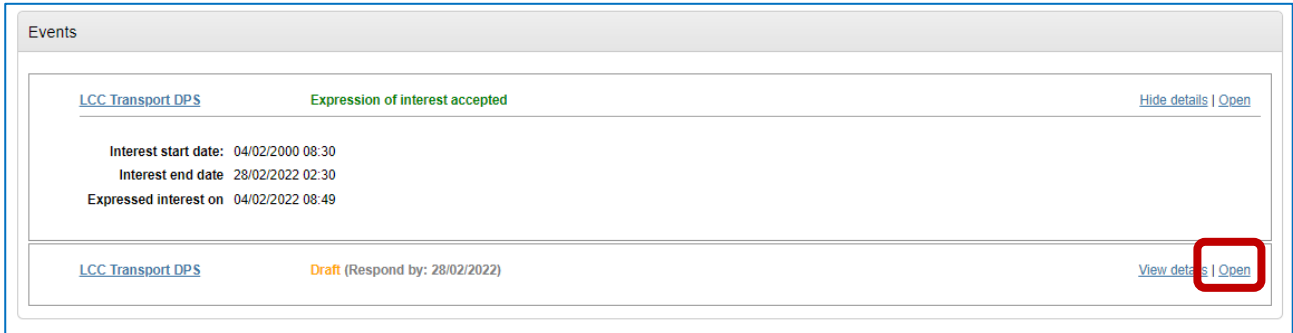
In the left-hand **Narrow your results** pane, put a tick next to **Lincolnshire County Council** and then click the green **Update** button at the bottom. The **LCC Transport DPS** project should appear in the list.

If you use ProContract a lot, the list may go onto several pages. To easily find the project type **transport** in the search box and click the green **Go** button.

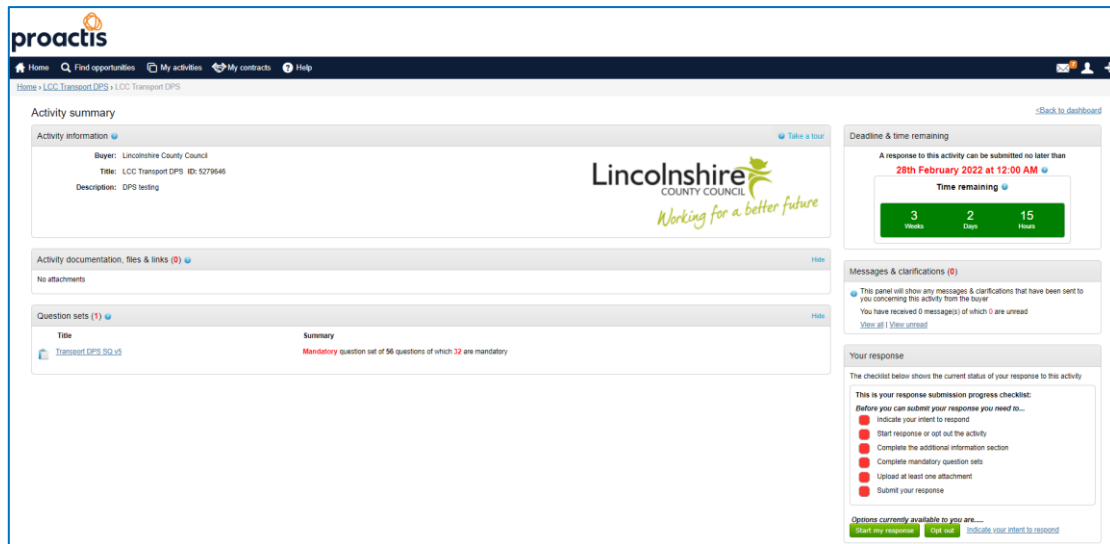
- 3.5 Once you have found the project using one of the above methods, click on it to open it.



3.6 On the events page, click **Start** (this label will change to **Open**, as shown below, after the first time you access this section), in the lower of the two boxes.



3.7 The next screen is the **Activity Summary** page.



3.8 Refer to section 4, for how to complete and submit the questionnaire.

4.0 Completing and submitting the Standard Questionnaire (SQ)

- 4.1 The SQ Summary page give an overview of the project. Initially you will see a number of red ‘traffic lights’ at the right-hand side of the screen. You need to work through the items one at a time to change all of the lights to green before you will be able to submit your questionnaire. The LCC Transport DPS is less complex than some, so has fewer lights/items to check off.


To get started scroll to the bottom of the page and at the bottom right click the green **Start my response** button. (If you have already started the questionnaire and are returning to complete it, this button will be labelled **View draft response**.)

The screenshot shows the 'Activity information' section for Lincolnshire County Council, with a title 'Supplier DPS April 2019' and a description 'Used to get screenshots for new updates to UX for the supplier guide'. The 'Activity primary contacts' section lists Mark Fairbank. The 'Question sets' section shows a 'Mandatory question set of 5 questions of which 3 are mandatory'. The 'Your response' section contains a checklist with items like 'Indicate your intent to respond', 'Start response or opt out of the activity', and 'Submit your response'. A green button labeled 'Start my response' is highlighted at the bottom right.

- 4.2 Once the button has been clicked, the screen will update and look similar to the screenshot below.

The screenshot shows the 'Your response summary' page. The 'Response information' section includes details for 'supplier_housing_67 company'. The 'Additional information' section contains a message: 'Supplier reference, response information & additional comments: You have acknowledged that you do not want to include a reference of your own, further response information or additional comments as part of your response'. A yellow box highlights the 'Edit' link in this section. The 'Question sets' section shows a 'Mandatory question set of 56 questions of which 32 are mandatory'. The 'Your response' section contains a checklist with items like 'Indicated intent to respond (07/02/2022 12:46)', 'Started to draft your response to this activity', and 'Completed the additional information section'. A green button labeled 'Save' is highlighted at the bottom right.

- 4.3 Click that **Edit** link on the **Additional Information** section (circled in yellow above). Lincolnshire County Council will not be evaluating anything from this section, so please do not enter any information. Scroll to the bottom and put a tick in the box next to the words **I have read and understood this section and can confirm I am happy not to include any additional information**, and click the green **Save** button (see screenshot below).

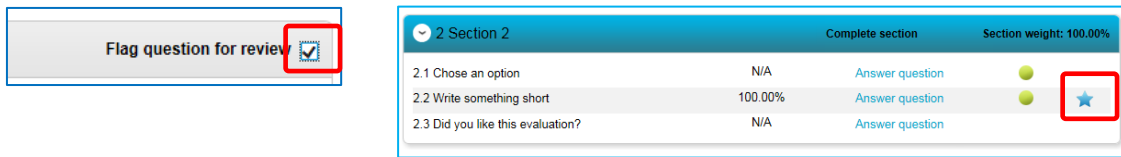
I have read and understood this section and can confirm I am happy not to include any additional information 

[Save](#) [Cancel](#)

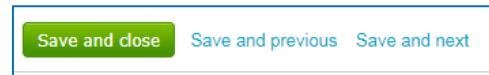
- 4.4 To complete the questionnaire, click on the blue **Edit** link on the **Question sets** section (Circled in red on previous page).
- 4.5 You should now see the questions that need to be completed. Use the coloured circles and the key at the right of the screen to determine which ones you still need to answer.

- 4.6 To complete a question click on the blue **Answer question** link next to the first question.
 - 4.6.1 Answer each question fully and truthfully.
 - 4.6.2 Many answers just require you to select Yes or No, but there are some multiple-choice and others are text boxes. Some questions will allow you to attach additional documents as evidence or add additional comments to support your answer.
 - 4.6.3 Many of the questions have **Question Help** (to the right of the question). This sometimes includes hyperlinks to additional information – it is important that you fully read all of the help and guidance, before answering the question.

4.7 If you want to mark a question for later action (for example if you don't have the relevant information to hand) you can **Flag question for review**. This will put a blue star next to it in the list of questions, so that you know that you need to go back to it.

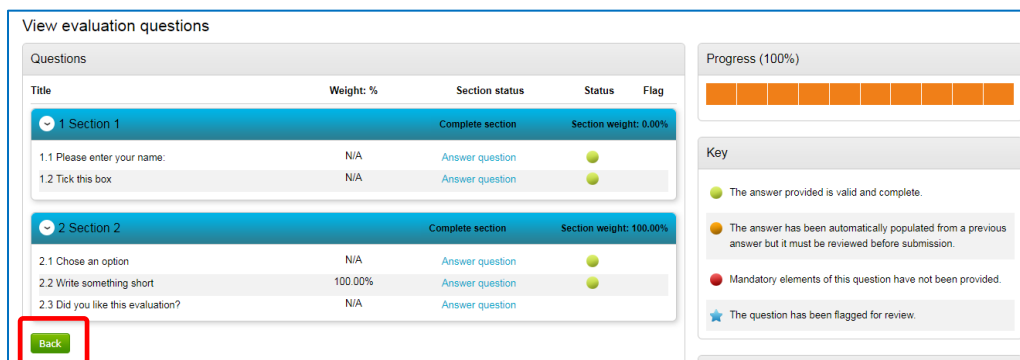


4.8 When you have finished a question you can choose to **Save and close** - to finish for now, **Save and previous** - to go back to the previous question or **Save and next** to go to the next question.



4.9 If you have chosen **Save and close** or you have finished the last question, the system will go back to the evaluation overview page as shown below. The progress bar will indicate how much of the questionnaire you have completed. In this screenshot the questionnaire is 100% complete. (The progress bar's standard colour is orange - this is **not** an indication that something is wrong.)

4.10 The SQ is a lengthy document and may need several 'sittings' to complete. Ensure that you click **Save and close** at the end of the last question you wish to complete at each session.

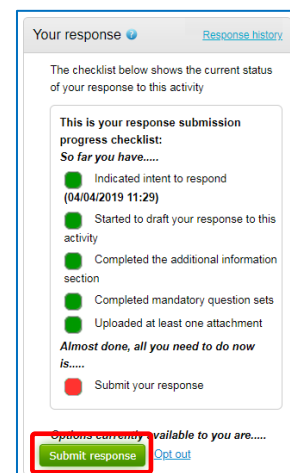


4.11 Click the green **Back** button (circled red above) to go back to the summary page.

If you are taking a break, all of the information you have entered will be saved, so you can leave the internet page if required.

If you have completed the questionnaire all of the traffic light should be green apart from the last Submit response light. If there are any remaining red lights, refer to the section and complete it.

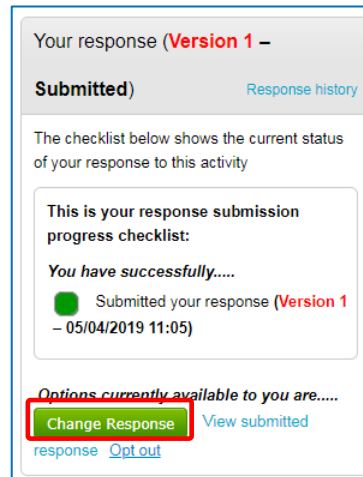
4.12 Once you are happy that the questionnaire is complete, click on the green **Submit response button**. You will get a confirmation message, so press Submit response again.



5.0 Making Changes After You Have Submitted the SQ

- 5.1 If you need to make a change to your SQ, before the round ends, you can. Go back to the SQ Summary page – See section 3 for how to do this.

From the SQ **Summary** page click on the green **Change Response** button. This will take you back to the summary page. Follow the instructions in sections 4.3 onwards, changing the required items.

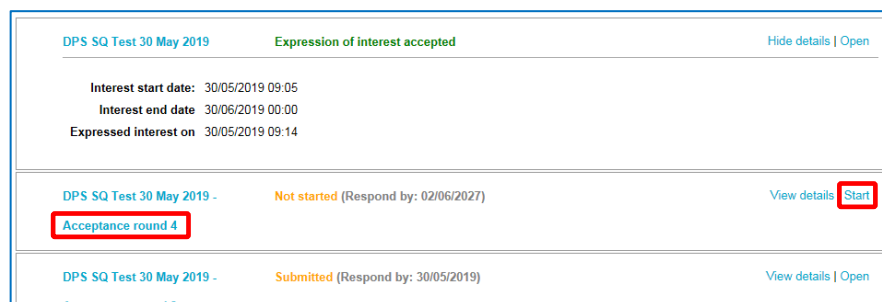


- 5.2 Do not forget to resubmit your bid by clicking the green **Submit response** when you have finished.
- 5.3 The system will then return you to the SQ **Summary** page.
- 5.4 As long as the round has not ended, you can repeat these steps as many times as you require.

PLEASE NOTE: Lincolnshire County Council will not be able to see your SQ answers until the deadline has passed, at which time they will only have access to the most recent version that you have submitted.

6.0 Resubmitting the SQ

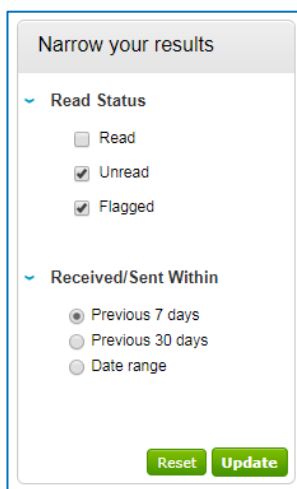
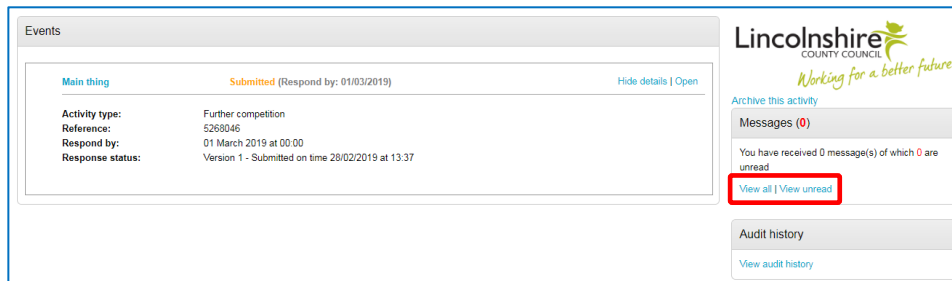
- 6.1 The Standard Questionnaire (SQ) assesses your suitability to be added to the shortlist for the Further Competitions. If you fail the SQ process for any reason, we will contact you to inform you of the areas where there were issues. If you can fix these issues, you can reapply for the SQ again. *For example, if you failed one of the Health and Safety questions, we would initially reject your SQ. If you then put remedies in place, you could resubmit the SQ with the relevant evidence and hopefully be successful on your second attempt.*
- 6.2 To resubmit, go back to the SQ Summary page – See section 3 for how to do this, but for the final couple of steps (3.6 onwards) see below.
- 6.3 You need to find the latest Acceptance round (the round with the highest number). In the screenshot below the highest number is **Acceptance round 4**. Once you have found the highest round, click on **Start** at the right of the box.



- 6.4 On the new screen, scroll down on the right-hand side and click the green **Start my response** button. (See section 4 for full details).
- 6.5 You will now need to change the SQ with the updated information. (See section 4 for full details.)
*NOTE: before you click **Edit** to start the questionnaire, the progress bar will show 0% - do not worry, when you click the **Edit** button, the answers that you entered previously will be copied over into the questionnaire.*
- 6.6 Go to the questions that need amending and enter the new information. When you have amended all of the questions click the green **Save and close** button.
- 6.7 Click the green **Back** button to go back to the summary page.
- 6.8 Once you are happy that the bid is complete, click on the green **Submit response** button. You will get a confirmation message, so press **Submit response** again.

7.0 Messaging

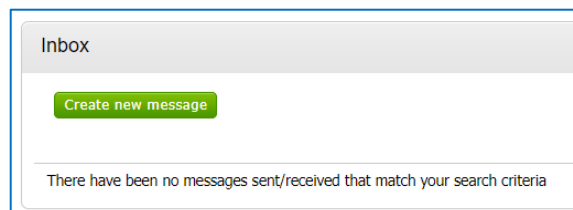
- 7.1 The **messages** box can be found on the right hand side of the **Activity Summary** page. The prompts are to **View** messages, but by clicking on the **View** link you will be redirected to a new window where you can also **Create** messages.



*NOTE: The default filter setting (the **Narrow your results** pane on the left-hand side) is to **not** show read messages. Also it will only show message for the last 7 days. To change these settings click the selections that you want and then click the green **Update** button at the bottom of the box.*

- 7.2 Any communication regarding the tender should be made through messaging, to ensure compliance with the Procurement Regulations.

7.2.1 To create a message click the green **Create new message** button.

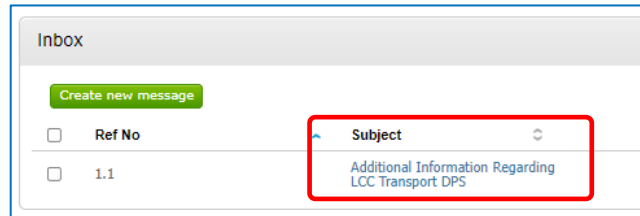


7.2.2 On the new message page the **To:** box will automatically filled in with **Project Team**. This is the procurement team at Lincolnshire – the only people you can send a message to.

7.2.3 Fill in the **Subject, Body** and add any attachments that you wish to include.

7.2.4 Click the green **Send message** button.

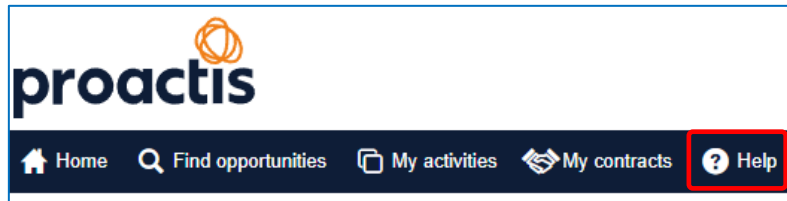
- 7.3 If the Project Team need to communicate any further information, this will come through the messaging area (and unless you have turned it off, it will send an notification to you email address).
- 7.3.1 To read the full message, log on to ProContract and go into the messaging area. Click on the message Subject (blue text) to read it.



- 7.3.2 If you wish to respond, click the green **Reply** button, compose your email and click the green **Send Message** button
- 7.4 You should check your messages from time to time and before you submit your SQ, to ensure you have the latest information that is available to all suppliers.

8.0 Further Help

- 8.1 One the main dark blue menu bar at the top of the ProContract screen, there is a **Help** menu with lots of help and guidance.



- 8.2 If you cannot find an answer to your issue, ProActis have a help desk for suppliers.
- 8.2.1 **New Users** - Email **ProContractSuppliers@proactis.com** for all ProContract support issues. This will auto-log a support ticket in the PROACTIS Supplier Support Helpdesk. You will be issued with a registration email that will give you instructions to allow you to log in, log, review and update your own tickets.
- 8.2.2 **Existing Users** - If you previously logged a ticket, please go directly to **<http://proactis.kayako.com/ProContractV3>** to log a ticket with the PROACTIS Supplier Support Team using the log in information you have been previously provided with. Please note, you do not need to log in. So, on the next screen just click Next and then you will reach the ticket logging screen. Please fill out all the boxes with as much information as possible and include your phone number in case the team need to call you.
- 8.2.3 **Phone Numbers for Supplier Time-Sensitive or Emergency Contact only** - In emergency or time-sensitive situations the Supplier Support Service Desk can also be contacted on UK Lo-Call number 0330 005 0352 for Supplier Support only, but this should be by exception and not as a rule **and you should already have logged a support ticket** via the method outlined above.

ProActis Helpdesk for Suppliers

Website: <http://proactis.kayako.com/ProContractV3>

Email: procontractsuppliers@proactis.com

Tel: 0330 005 0352

Appendix A – Registering for a ProContract Account

A.1 Go to the ProContract website at: <https://procontract.due-north.com/Login>

A.2 Go to the section **New to ProContract** and click on the blue link **Register free**.

A.3 The next screen will ask you for some details about your company. Fill in Organisation name and your email address.

You must enter a valid email address as this will be used to confirm your registration and keep you updated on new procurements and updates to existing ones.

If your company is already registered, you will get an error message. You will need to find an existing user with administration rights within your company and ask them to set up your new account.

If you cannot identify this person, you will have to contact the ProActis help desk – See section 2 for contact details.

A.4 On the next screen you will be asked to enter more information about your company.

The screenshot shows a registration form with the following elements:

- A text input field with the placeholder "e.g. http://www.example.com".
- A section titled "Registration number (optional)" containing a text input field with "e.g. 03182974", a green checkmark, and a checked checkbox labeled "Not applicable".
- A section titled "VAT number (optional)" containing a text input field with "e.g. GB999 9999 73", a green checkmark, and a checked checkbox labeled "Not applicable".
- At the bottom, there is a green button labeled "Continue registration" and a link "Already registered? Log in here".

At the bottom it asks for the Company Registration and VAT numbers. These are marked as optional, but you **MUST** either complete them or tick **Not applicable**.

A.5 The next screen asks you to categorise your business and the geographic areas you can supply to. The system uses this information to notify you of any new opportunities in your business category and region of supply. It is worth spending some time completing this fully, as it could generate new business leads for you in the future.

Supplier registration - Areas of interest

Opportunity areas of interest

A.6 Enter a couple of keywords then click the green **Find suggestions** button. The system will show you categories that match your keywords. The system will show you the top level categories. To see sub-categories click the square with a '+' sign in it to expand. You can tick as many categories as required to classify your business

A.7 The next section asks you to identify your region of supply. For example if you are a national company you could click **UK**. If you are a small local company click the square with a '+' sign in it next to UK to see regions, and if required click the '+' again to find a particular county. *(Please note this is the region that you can supply to, not the region you are based in - for example if your business creates websites, you could probably supply to any country around the world, even though you are working from a home office in a small village.)*

A.8 Once you have completed all of the information click on the submit button. You should receive a confirmation email within a couple of hours. When you do, follow the instructions to log into the supplier site.

Version Control

Version	Date	Details
V22.02.1a	09/02/22	Initial version authored by Mark Fairbank, Procurement System Support Officer