Oracle

Preconstruction

General Contractor User Guide

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Oracle Preconstruction General Contractor User Guide

Primary Author: Oracle Corporation

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About This Guide

This guide explains how to use Oracle Preconstruction as a general contractor to manage tenders.

General contractors who are responsible for organizing tender packages, sending requests for tenders, and awarding work to subcontractors should read this guide.

Oracle Preconstruction Overview

Oracle Preconstruction helps connect general contractors with the most qualified subcontractors for their projects.

In Preconstruction, individual contracts for each of the disciplines involved in each project are represented by tender packages.

Watch the overview video (1:48): Australia/New Zealand | US/Canada

One Application, Two Roles

Two kinds of users use Preconstruction: General contractors and subcontractors. General contractors create the tender packages, and subcontractors place the tenders. But that's not all they can do.

General contractors can—

- **Maintain project documentation**. Keep your plan drawings, contracts, scheduling documents, and all other important files organized with their corresponding projects and tender packages.
- **Maintain a directory of subcontractors**. As your organization builds relationships with subcontractors, keep information about them organized in one directory.
- **Send invitations to tender**. Create tender packages that represent contracts for all of the disciplines required on your projects, and then send invitations to tender on them to the subcontractors of your choice.
- **Respond to subcontractor RFIs**. As subcontractors review tender packages, they can use the application to send requests for information, and you can use it to respond to them.
- **Review tenders and award contracts**. Review tenders side-by-side in a convenient card layout for quick comparison, and then review details and attached documents for each. After subcontractors have submitted their tenders and you have reviewed them, award the tender packages.
- **Send messages to subcontractors**. Send general text-based messages with attachments to subcontractors.

Subcontractors can—

- **Accept invitations to tender**. You can receive invitations to tender by email. If you're not already using the application, you can set up a free account and place your tender.

- **Review work requirements**. When you receive an invitation to tender, you can view all of the information the general contractor made available for it. But if something's lacking...
- **Submit RFIs**. Need more information? Preconstruction has a built-in system to manage RFIs, which you can use to submit RFIs and get the information you need.
- **Receive messages from general contractors**. Receive general text-based messages with attachments from general contractors.

Premium Features for Subcontractors. Subcontractors with **Premium** access have additional capabilities.

By default, Preconstruction logs you out of the application after eight hours of inactivity.

Administrator Roles and Privileges

There are organization level administrators and project level administrators in Oracle Preconstruction. These privilege levels determine the amount of control and interaction a user can have with projects and feature areas.

Administrator roles can be set when the organization administrator adds other users to an organization. See ***Add a User*** (on page 25).

Only an organization administrator can—

- **Assign and unassign other organization administrators.** An organization administrator may choose to add a secondary user at this level as a backup administrator.
- **Create, copy, view, and manage all tender packages and projects.** These users can view and manage all files and settings for tender packages and projects.
- **Update their organization profile.** These users can modify all organization details, such as contact information, location, and other information.
- **Add and invite new users.** Organization administrators can manage users in an organization by adding or inviting new users to the organization, and they can also delete contacts from an unregistered organization.
- **Add/update vendor contacts and import subcontractor lists.** Organization administrators can update private vendor data and add new vendors to their directory to include accepting or declining connection requests.

> **Note**: Organization administrators manage default project settings in the **Project controls** area which impacts privileges for project administrators.

General contractors have access to additional settings to manage their organization and users on a project level, but they can choose to assign project administrator status to other users as well. See ***Specify Who Can Create Projects (General Contractors)*** (on page 20).

Project administrators can—

- **Create projects and manage project details.** The organization administrator grants this level of privilege. A project administrator can only create and modify their own projects if the organization settings allow it.

When you create your own project, you are considered the project administrator for that project, and any other project you create, unless project or user settings are adjusted by the organization administrator.

- **View/edit profile.** Project administrators can view and edit their own profile settings, but not at an organization level.

> **Note**: Project administrators can only manage information for projects that they create themselves.

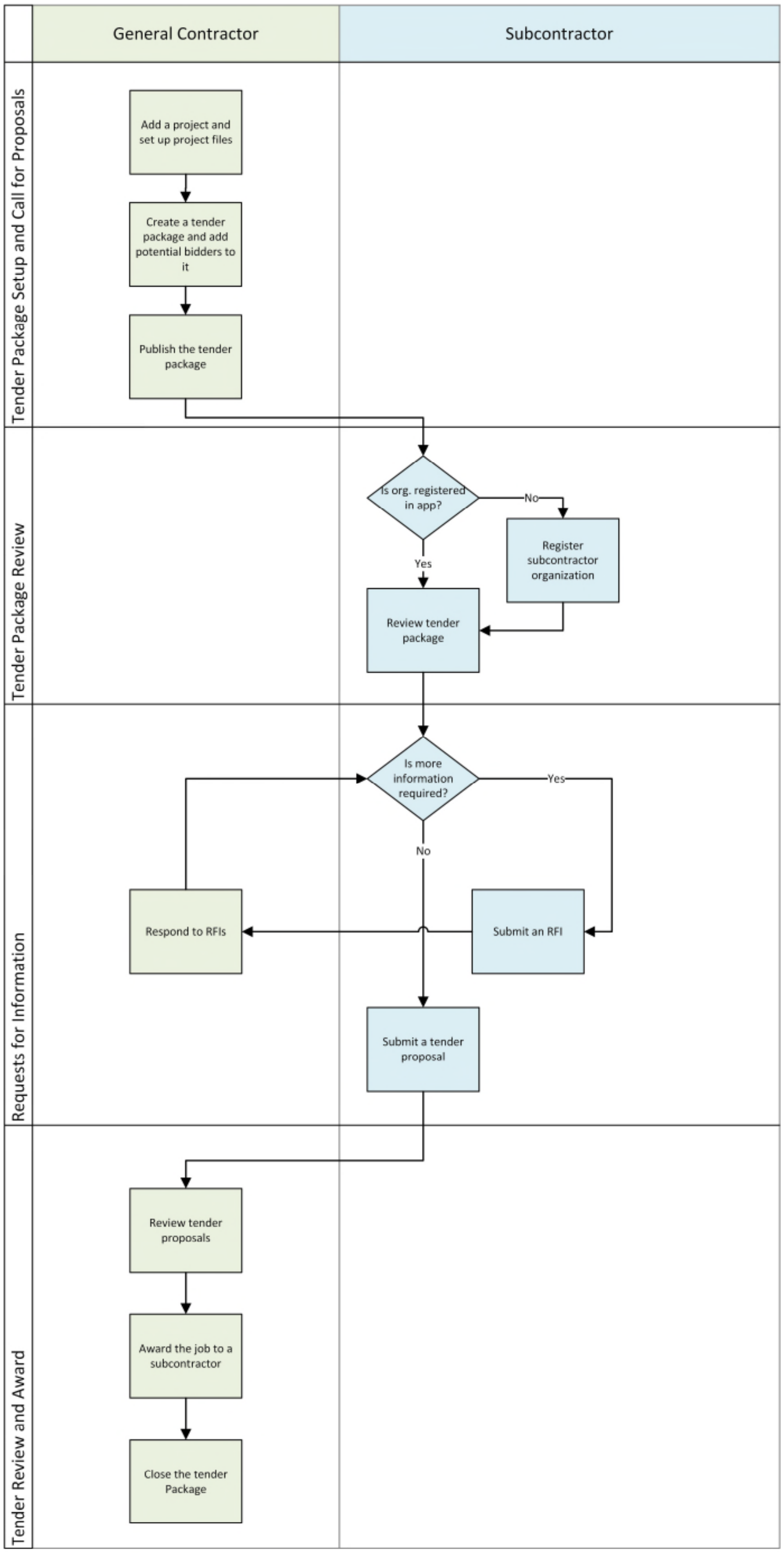
Non-administrators can—

- **Receive/accept/decline invitations to tender**. You must set your profile to Public in order to submit a tender view new opportunities.
- **Receive messages and attachments.** General contractors can respond to messages from subcontractors with text or attachments.
- **View tender and generate some reports.** Users with project access can view the **Reports** page and generate status and message history reports for projects for which they have been granted view access.
- **View opportunities.** Users with Premium access who have been invited to tender can view open opportunities, download files, and manage their opportunities.

  See Premium Features for Subcontractors.

The Tender Process

The tender process involves two parties: The general contractor, who puts together the tender packages and puts out the call for proposals, and the subcontractors, who submit tenders.


General Contractor
Subcontractor
Tender Package Setup and Call for Proposals
Add a project and set up project files
Create a tender package and add potential bidders to it
Publish the tender package
Tender Package Review
Is org. registered in app?
No
Register subcontractor organization
Yes
Review tender package
Requests for Information
Is more information required?
Yes
Submit an RFI
Respond to RFIs
No
Submit a tender proposal
Tender Review and Award
Review tender proposals
Award the job to a subcontractor
Close the tender Package

While the application offers some flexibility in how you manage tenders, this is the standard process for which it is optimized:

Tender Package Setup and Call for Proposals

1) **General Contractor**: Adds a project in the application.

   The tender process starts with a project record. When you invite contractors to submit proposals, you can quickly add any contacts who are already associated with organization records.

2) **General Contractor**: Sets up project files.

   Project files include much of the important information that subcontractors need to make informed tenders.

3) **General Contractor**: Creates a tender package.

   These tender packages represent contracts for different areas of work on the project.

   Each tender package corresponds to at least one discipline or trade. For example, if you have a project that involves building a house, you may have one tender package for rough carpentry, another for fire and smoke protection, and another for roofing. Preconstruction provides the flexibility to use multiple disciplines for one tender package, if necessary.

   When you create a tender package, you can set a due date, which determines how long potential tenderers will have to submit their proposals.

4) **General Contractor**: Adds potential tenderers to a tender package.

   With a project and tender package set up, the general contractor can invite potential tenderers who specialize in the trades covered by the tender packages.

   For example, on a tender package that covers tiling work, it would make sense to invite potential tenderers whose specialty is tiling.

5) **General Contractor**: Publishes the tender package.

   When a tender package is published, all of the potential tenderers who were added to it receive an invitation to submit a proposal.

   The subcontractors can then use the application to submit their proposals, or the general contractor can enter proposal information on behalf of tenderers who prefer to submit the proposals by some other means.

Tender Package Review

1) **Subcontractor**: Registers their organization (if necessary).

   If a subcontractor is new to the Preconstruction application, they can set up a record for their organization the first time they navigate to it from their email invitation to tender.

2) **Subcontractor**: Reviews the tender package.

Requests for Information (RFIs)

1) **Subcontractor**: Submits RFIs (if necessary)

   If there are any questions about a contract, subcontractors can submit requests for information through the application.

2) **General Contractor**: Responds to RFIs

After receiving RFIs, general contractors can respond to them through the application.

Tender Submission, Review, and Award

1) **Subcontractor**: Submits a tender.

   After a subcontractor has set up their organization record, and after they have sorted any necessary RFIs with the general contractor, they can submit a tender.

2) **General Contractor**: Reviews tender.

   The general contractor can review proposals at any time, either as they come in or after the tender package due date has passed.

3) **General Contractor**: Awards the job to a contractor.

   After reviewing all of the proposals, the general contractor can choose to award the tender package to a subcontractor.

4) **General Contractor**: Closes the tender package.

   When a tender package no longer requires any edits, the general contractor can close it. This prevents any changes being made to it in the application.

Getting Started

How you get started with Oracle Preconstruction depends on your role. View the Getting Started topic for your respective role for a brief walkthrough of how you can start using Oracle Preconstruction today.

Welcome Emails and What You Do with Them - General Contractors

When a general contractor organization starts setting up Preconstruction, the first administrator in the organization receives an initial email from oraclecloudadmin_ww@oracle.com to activate or choose an existing Oracle Cloud account. This email includes a link to activate the account and an expiration date for the link.

One to two business days after your account has been activated, you receive two more emails.

The first is from no-reply@oracle.com, and it is to activate your identity domain account, which is required to access Preconstruction, and set up a password.

The second is from noreply@preconstruction.oraclecloud.com, and it is a welcome email that includes the link to access Oracle Preconstruction. Use your email and password for your identity domain account.

If your password is reset, a temporary password is sent from oraclecloudadmin_ww@oracle.com or no-reply@oracle.com.

Tips

- If you do not receive the welcome email or the account activation email, check the spam or junk folder in your email account, or contact Oracle support.
- If you miss the window to activate your Preconstruction account, contact Oracle support.

- In order to prevent Preconstruction emails being blocked or redirected to your spam folder, add these email addresses to your address book or list of approved contacts:
  - oraclecloudadmin_ww@oracle.com
  - noreply@preconstruction.oraclecloud.com
  - no-reply@oracle.com

Getting Started for General Contractors - Administrators

If you're a general contractor, use Oracle Preconstruction to find qualified subcontractors, invite them to tender on your projects, and maintain records and correspondence with them.

As an administrator for your organization, you should also configure the application so that it is ready to use for you and other members of your organization. This topic will walk you through the steps you'll need to take in order to set up the application for your organization's use. See ***Administrator Roles and Privileges*** (on page 8).

The order of these steps is just a suggestion - you might find a different order would better suit your organization's needs.

But first, take some time to get yourself familiar with Preconstruction and log in to the application:

- Preconstruction Overview: Australia/New Zealand | US/Canada

To get started as a general contractor with administrator privileges:

1) Get to know the tender process.

   Review the tender process to learn how general contractors and subcontractors use Oracle Preconstruction.

   - ***The Tender Process*** (on page 10)

   Learn more about the tasks specifically available to you:

   - Get Started for a General Contractor: Australia/New Zealand | US/Canada

2) Configure your organization profile.

   Check your organization profile and update it as needed.

   - ***My organization*** (on page 23)

   Learn about managing privacy settings and configure as needed.

   - ***Your Responsibilities*** (on page 71)

3) Configure your organization's default tender settings.

   These determine which file folders and trade codes are available when users set up projects and tender packages.

   - ***Settings (General Contractors)*** (on page 20)
   - ***Configure Default Folders*** (on page 21)
   - ***Choose Which Trade Codes Are Available for Projects*** (on page 21)

4) Add users from your organization.

When you add other users from your organization, you can decide whether to add them as administrators or non-administrators. After you add users, they receive an email invitation to log in to Preconstruction for the first time.

It's a good idea to add another Preconstruction administrator. This will allow someone else to manage settings and restore your account if necessary.

- ***Add a User*** (on page 25)

Using an Identity Domain

All Oracle Preconstruction customers whose environments are provisioned on Oracle Cloud Infrastructure (OCI) have access to an identity domain account. If you're the tenant administrator, you can access the identity domain to manage password security for the users added to your Preconstruction environment. Managing password security from your identity domain console is not necessary for you or other users to log in to Preconstruction, so the following actions are optional based on your organization's security needs.

The information for how to access your organization's identity domain console is included in your Preconstruction environment welcome email, Section 4, "Oracle Account Information".

You can choose to change the password policies for your Preconstruction environment users. Some examples of password policies that the tenant administrator can manage in an identity domain include the number of days until passwords expire, the required password complexity, and how many unique new passwords a user must use before they can reuse an old password, among other criteria. To learn more about your identity domain and password policies, visit the documentation for your identity domain.

An identity domain might also provide the ability to set up an external identity provider to handle user credentials, with the identity domain acting as the service provider. To learn more about identity providers in your identity domain, visit the documentation for your identity domain.

If your tenant administrator needs to be replaced for any reason, or if you have questions about your identity domain or would like to explore further actions in your identity domain, contact Oracle support.

Getting Started for General Contractors

If you're a general contractor, use Oracle Preconstruction to find qualified subcontractors, invite them to tender on your projects, and maintain records and correspondence with them.

The order of these steps is just a suggestion - you might find a different order would better suit your organization's needs.

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- Preconstruction Overview : Australia/New Zealand | US/Canada

To get started as a general contractor:

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   Review the tender process to learn how general contractors and subcontractors use Oracle Preconstruction.

- ***The Tender Process*** (on page 10)

Learn more about the tasks specifically available to you:

- Get Started for a General Contractor : Australia/New Zealand | US/Canada

2) Learn more about the areas where you'll do most of your work.

   If you will be setting up projects:

   - ***All Projects*** (on page 36)
   - ***Add a Project*** (on page 37)

   If you will be managing tenders:

   - ***Tender Packages*** (on page 39)

3) Review your profile on the ***My Profile*** (on page 18) page, where you can also edit your name, contact information, and profile visibility.

Notifications

View notifications to stay up to date with activity within Oracle Preconstruction. You can choose to view all of your notifications, or only those that are unread. Notifications are categorized by Other Notifications and System Messages, and they are arranged by status of unread or read and the time and date on which they were received.

Notifications Overview

There are two types of Preconstruction notifications: in-application notifications using the Notifications link and messages sent to the email address you used to register. You receive notifications in the application for system announcements or updates and alerts for other user activities, such as connection requests.

You'll receive an in-application notification if:

- There is a system announcement
- You receive a connection request

You'll receive an email from Preconstruction if:

- There are necessary actions or updates for your account. For example, you will receive automated welcome emails when you join Preconstruction and an automated email alerting you two weeks prior to the end of your subscription to remind you of renewal.
- Password changes have been made
- New RFIs are submitted (GC)
- You're invited to submit a tender or tender packages are awarded
- Contacts are imported successfully from another application
- A tenderer changes or updates an email address (GC)

Tips

- Some email notifications depend on preference selections made in the **My Profile** menu. To update your email preferences, see ***Change Your Preconstruction Email Preference*** (on page 19).

View Notifications

View notifications and alerts using the Notifications link to stay up-to-date with other Preconstruction updates and other notifications that involve you.

To view notifications in Preconstruction:

1) Select **Notifications** in the top right of the application header. The Notifications panel expands to display new notifications by category: **Other Notifications** or **System announcements**.

   If there are notifications, the Notification icon displays a yellow indicator with the number of unread notifications. You do not have any other notifications or system announcements to review if the Notification icon is gray.
2) Select the notification you would like to review.

> **Note**: System announcements display until after the shown expiration date.

Working with the Help Panel

The Help panel provides a comprehensive overview of Preconstruction. Receive context-sensitive help on any page of the application by selecting **Help**.

Use the following controls in the Help panel:

- **Home**: The top level of the help system. From here, you can navigate to conceptual overviews and procedure instructions for all of the areas of the application.
- **Refresh**: Refreshes the Help panel to display help for the current page.
- ••• **More**: Use More Help to access keyboard shortcuts, support services and resources, and view information about the current version of the application.

You can also navigate the Help panel by entering search terms in the Help panel search field. Refine your search results by selecting whether to search All words, Any words, or Exact phrase. Access the search page by selecting **Revise search** in your search results.

Select **Open topic in new window** to view the current topic in a new browser window.

Setup Overview

You can edit various user and application settings.

My Profile

Your user profile is how other users see you in Preconstruction.

On the My profile page, you can edit your name, contact information, and specify whether you want your profile to be public or private. You need a public profile to create projects, tender on opportunities, and access the directory.

You can also edit your e-mail communication preferences here, and adjust Language settings to change the in-application text display.

Edit Your Name and Contact Information

You can view and edit your name and contact information.

To edit your name and contact information.

1) In the user menu, select **My profile**.
2) On the **My profile** page, select **Edit**.
3) In the **Contact information** area, enter or update your name and contact information.
4) Select **Save**.

Make a Profile Private or Public

You can choose whether your profile is designated as public or private. A private organization can be seen by general contractors in the directory, but the organization name is designated with a Private badge. You will be prompted at registration to designate your profile as public or private, but you can always change this setting later by editing your profile.

General contractors need a public profile to create projects and to access the directory. Public and private organizations are only discoverable by general contractors in their own directory, and they can both receive invitations to tender. Private organizations and users are hidden in the public directory.

You may choose to remain private while you finish setting up your organization or profile. You can even mark yourself as private when you don't want to be considered for bids, for example, while you're out of the office. A private organization will display a Private badge beside its name.

To choose whether your profile is private or public:

1) In the user menu, select **My profile**.
2) On the **My profile** page, select **Edit**.
3) In the **User profile privacy** area, select **Yes, I agree** if you want your profile to be public or **No, I don't agree** if you do not want your profile to be public.

Change Your Preconstruction Email Preference

You can choose whether Preconstruction sends you emails related to tender packages and opportunities. These emails make it easier to keep track of important progress updates, but you can choose not to receive them. Additionally, subcontractors can adjust the frequency at which they receive new open opportunity emails.

Even if you opt out, you will continue to receive emails related to your account.

To change your Preconstruction email preference:

1) In the user menu, select **My profile**, and then select **Edit**.
2) Under **Email Preference**, select **Yes, I want to receive emails**, which is the default setting, or **No, I don't want to receive emails**.

As a subcontractor, you can choose how frequently you would like to receive emails about new open opportunities from general contractors. You will only receive these emails if new opportunities are created within the time frame you select.

To change Preconstruction invitation and new opportunity email settings for subcontractors:

1) In the **Email Notifications** area, under **Invitations to tender**, select **On** or **Off** to choose whether or not you want to receive invitations to tender from general contractors. The default email notification setting is **On**.
2) Under **Open Opportunities**, select **On** or **Off** to choose whether or not you want receive emails about new open opportunities.

   If you choose to receive new open opportunity emails, you can make an email frequency selection from the **Frequency** list.

   - **Weekly**: Select to receive emails every week on Mondays to alert you of new open opportunities. This is the default frequency setting for new open opportunity emails.
   - **Every Two Weeks:** Select to receive a bi-weekly email on Mondays with information about new open opportunities posted in that time frame.
   - **Monthly:** Select to only receive new open opportunity emails on the first Monday of each month.

Selecting **Save** applies and keeps your changes. Selecting **Cancel** discards them.

Change Your Display Language

You can change the display language for all text in the application, and apply the same settings for e-mail communication, according to your geographic location and preferences.

To change the language display:

1) In the user menu, select **My profile**.
2) On the **My Profile** page, select **Edit**.
3) Make your selection from the available **Language** options.

Options include English (Australia/New Zealand), English (United States/Canada), or Français.

4) Select **Save**.

If you do not make any selections, the application defaults to a language setting based on the location of your data center. Users in the United States and Canada with United States data centers default to English (US) and users in Australia with Australian data centers default to English (AU).

Reset Your Password

Oracle Preconstruction provides an option to reset your password at any time.

To reset your password:

1) Navigate to the **Oracle Cloud Account Sign In** page.
2) Select the **Can't sign in** link.
3) On the **Forgot your password** page, enter your username, and then select **Next**.
4) Review the on-screen message, and select **Submit**.
5) Select the **Password Reset** button in the email you receive.
6) On the **Reset Your Password** page, complete the **New Password** and **Confirm New Password** fields.

   Note: The **Confirm New Password** field will not be active until your new password meets the specified criteria.

7) Select **Submit**.
8) Select **Click here to continue** to navigate back to the **Oracle Cloud Account Sign In** page, and log in with your new password.

Settings (General Contractors)

If you belong to a general contractor organization, use the Settings page to change settings for tenders, add and remove default file folders, and edit trade codes.

Specify Who Can Create Projects (General Contractors)

If you're a general contractor with administrator privileges, you can determine whether all users in your organization or just administrators can create projects.

To specify who can create projects:

1) In the user menu, select **Settings**.
2) On the **Settings** page, select **Edit**.
3) In the **Project controls** area, select one of the options:
   - **Any org user can create tender Projects**: Any user in your organization can create projects.

- **Only org admins can create tender Projects**: Only users with administrator privileges in your organization can create projects.

4) Select **Save**.

Configure Default Folders

You can add, edit, and delete the folders that are available by default when users add files to projects. This is useful if you want the same folders to be included in all new projects, which can improve consistency and predictability in how information is organized in projects.

To configure default folders:

1) In the user menu, select **Settings**.
2) On the **Settings** page, select **Edit**.

   In the **Project controls** area, in the **Default folders** section, add, edit, and delete the folders.

   - To add a folder, select + **Add**. In the **Name** field, enter a name, and then press **Enter**. Select **Save**.
   - To edit a folder, double-click a folder name, make the update, and press **Enter**. Select **Save**.
   - To delete a folder, select the row for the folder name, and select **Delete**. Select **Save**.
   - To create a specific order for folders, drag and drop them into the order you prefer. This is especially helpful if you have files and folders that have a priority order.

Choose Which Trade Codes Are Available for Projects

The kind of work that a tender package covers is given by the trade codes that you assign to it. When you create a tender package, you assign the trade codes.

By default, new tender packages are named according to the first trade code you assign it. Of course, you can change the name of a tender package, but it's important to remember that each one should cover work that is described by its trade codes.

When members of your organization start adding tender packages to projects, you specify which set of trade codes they will have to choose from.

To select trade codes:

1) In the user menu, select **Settings**.
2) On the **Settings** page, select **Edit**.
3) In the **Trade Codes** area, under **Trade codes to display**, select the trade code types that you want to be available in projects:

- **CSI MasterFormat (UCI specific)**: Display a set of generic default trade codes as specified and defined by the Construction Specifications Institute (CSI). These trade codes may not be common in all regions. They are usually shown with six-digit numerical identifiers and include general categories, like Masonry (040000), and many levels of subcategories, like Stone Assemblies (044000).

  This is a good choice if your project records match the project spec scheme used by the Construction Specifications Institute.

  Only trade codes specified by the CSI are available with this option with no customization.
- **Default trade codes (Generic Default trade codes not including custom codes)**: Display generic default trade codes that have been added in the application on the Settings page. By default, this set is more generic. It includes many to start, and it gets as specific as "Louvres & Grilles," but it's still just a long flat list that might not align perfectly with CSI standards.

  Default trade code settings cannot be changed.
- **Custom trade codes (Generic codes added by your organization)**: Display a custom set of trade codes specific to your organization that can range from generic trade codes to special trade codes.

  Newly added custom trade codes will be available for all active projects, existing and new. If you change a custom trade code that has already been used, the settings for that custom trade code will not be changed for those projects. Changes will only apply the next time you create a project. This makes it easier for you to maintain a history of popular custom trade codes used among your organization while still being able to tweak them as needed for new projects.

4) If the **Trade codes to display** setting is set to include generic trade codes, you can add and remove them in the **Generic trade codes (Custom trade packages)** list.

> **Note**: You can choose to display only **Custom** or **Default** trade codes in the list by applying a filter in the **Filters** list.

Add Custom Trade Codes

If you use generic trade codes, you can add custom trade codes to the list that is available when users in your organization create projects.

Newly added custom trade codes are available for all active projects, existing and new. If you change settings for a custom trade code that has already been used, that custom trade code will not be changed in previous and active projects. Changes will only apply the next time you create a project. This makes it easier for you to maintain a history of popular custom trade codes used among your organization while still being able to tweak them as needed for future projects.

To add custom trade codes:

1) In the user menu, select **Settings**.
2) On the **Settings** page, select **Edit**.
3) In the **Trade codes to display** area, select **Custom trade codes**.
4) In the **Generic trade codes (Custom trade packages)** area, select **Add**.

5) In the new row, enter the name of the custom trade code and press **Enter**.

Delete Custom Trade Codes

You can delete custom trade codes. When you delete a custom trade code, it will be removed from the list of trade code options when someone from your organization creates a new project. If any closed projects were using that custom trade, the code will remain for those projects.

To delete a custom trade code:

1) In the user menu, select **Settings**.
2) On the **Settings** page, select **Edit**.
3) In the **Generic trade codes (Custom trade packages)** list, find the custom trade code that you want to delete. Type the custom trade code name into the Search bar, or display only custom trade codes to browse all custom trade codes by selecting the **Custom** option in the **Filters** list.
4) In the row for the custom trade code that you want to delete, select **Delete**.

   Note: You won't receive a warning when you delete the trade code. So make sure you really want to delete it before proceeding.

Tips

- You can also delete multiple custom trade codes simultaneously. In the **Generic trade codes** list, select the check box in the row for each custom trade code that you want to delete. Then, in the heading of the trade code list, select **Delete**.

My organization

Use the My organization page to view and edit details about your organization.

Edit Your Organization Details

Keep the information about your company in Preconstruction accurate and up-to-date to help your organization build strong connections.

Premium Feature

If you are a subcontractor, you need a Premium subscription to edit your company's **Preferred project categories** and **Preferred project values**.

To edit your organization details:

1) On the user menu, select **My organization**.
2) On the **My organization** page, select **Edit**.
3) In the sidebar, select your organization logo to update or edit it.
4) In the organization sidebar, under your organization logo, edit your organization's location and contact information.

> **Note**: Remember to keep your organization's contact name and information current because it will display in the invitation emails that you send to subcontractors.

5) In the organization sidebar, in the **Service area** field, enter the distance that your organization is willing to travel for work. The distance format defaults to your local data center standards: miles (US/Canada) or kilometers (AU).

   The service area helps you connect with other organizations that work in the same areas as you.

6) In the **Details** area, enter or edit the following information:

   - **Trade codes**: Trade codes represent the nature of your organization's work in a formalized way. In any given project, each tender package typically corresponds to a trade code or a small number of trade codes.
   - **Business Type**: With values like "Consultant," "Project Manager," and "Architect/Engineer," Business Type is meant to convey to other organizations how yours does business.
   - **Enterprise Certifications (US only)**: In this field, include any officially recognized certifications that your organization has received. This typically includes government certifications.
   - **Preferred Project Categories**: Use this field to convey to other organizations what kind of projects you want your organization to be involved in. It includes categories like "Civil," "Commercial," and "Utilities."
   - **Preferred min project value**: Select the lowest value project for which you would prefer to submit a tender.
   - **Preferred max project value**: Select the highest value project for which you would prefer to submit a tender.
   - **Labor Type (US only)**: The choices here refer to how employees in your organization are compensated.
   - **Description**: It can be hard to capture everything your organization does with a few fields, so use this field to enter your own description of 1000 or fewer characters.

7) Select **Save**.

View License Usage (General Contractors)

If you have a general contractor Preconstruction account, you can view information about your organization's Preconstruction licenses.

To view license usage information:

1) In the user menu, select **My organization**.
2) On the **My Organization** page, select **License usage**.

   The **License usage** panel includes these usage statistics:

   - **Licenses purchased**: The total number of Preconstruction licenses that your organization purchased for use.

- **Licenses assigned**: The total number of Preconstruction licenses that have been assigned to members of your organization. Each separate set of login credentials for each member of your general contractor organization represents one assigned license.
- **Licenses available**: The number of licenses that are available for assignment to other members of your general contractor organization. Each available license represents a new set of login credentials that you can set up for a new user in your organization.
- **Licenses over assigned**: The number of accounts beyond your allowed license limit. Your organization may be charged for using more licenses than are included in its purchase of Preconstruction.
- **Subscription End Date**: At the bottom of the **License Usage** panel, you will be able to view the date that your licenses for Preconstruction expire.

> **Note**: You will receive an automated email two weeks prior to your subscription end date to remind you to renew your Preconstruction subscription.

Add a User

From the **Users** tab, you can add additional users to your organization profile if you have administrator privileges.Each user that you add will receive an email with instructions to set up their password and log in for the first time. You can also view all existing users in your organization here along with other information including their role, activity, and location.

To add a user:

1) On the user menu, select **My organization**.
2) On the **My organization** page, on the **Users** tab, select + **Add**.
3) In the **Add user** panel, enter the new user's information.

   In the **Administrator access** area, select **Yes, administrator** if you want the new user to have full administrator privileges. These include the ability to view all projects created by all users in your organization.

   Otherwise, select **No, not an administrator**. This option only enables the user to view and work with the projects that they have added or that have been marked visible to all users in your organization.
4) Select **Add**.

For more information about administrator roles, see ***Administrator Roles and Privileges*** (on page 8).

Deactivate a User Account

If you want to revoke a user's access to your organization's Preconstruction instance, you can deactivate their account. This makes one additional Preconstruction license available to your organization. This is useful if someone in your organization isn't using a license often enough to warrant license assignment. You can quickly check an individual user's license usage from the Users tab by viewing the date in the **Last logged in** column. User accounts are suspended after 365 days of inactivity if they are not present in the private directory of any general contractors. A subcontractor who is a member of at least one general contractor's organization will remain active in Preconstruction until manually deactivated.

This does not delete the user's account, but it does make it inactive, which means the user won't be able to log in. An administrator can always reactivate an inactive account.

To deactivate a user account:

1) On the user menu, select **My organization**.
2) On the **My organization** page, on the **Users** tab, find the row for the user whose account you want to deactivate.
3) In the user row, select **Actions**, and then select **Deactivate user**.

Activate (or Reactivate) an Inactive User Account

If you want to restore an inactive user's access to your organization's Preconstruction instance, you can reactivate their account. You do not have to log in frequently to keep a user profile active in Preconstruction; however, accounts are suspended after 365 days of inactivity if they are not present in the private directory of any general contractors. A subcontractor who is a member of at least one general contractor's organization will remain active in Preconstruction until manually deactivated.

To activate an inactive account:

1) On the user menu, select **My organization**.
2) On the **My organization** page, on the **Users** tab, find the row for the user whose account you want to activate.
3) In the user row, select **Actions**, and then select **Activate user**.

Reset a User's Password

If a user forgets their password, they can request an email to reset it. Alternatively, another user with administrator access can have Preconstruction send the user a password reset email.

If you lose your own password, view ***Reset Your Password*** (on page 20).

To send a password reset email to a user:

1) In the user menu, select **My organization**.
2) On the **My organization** page, on the **Users** tab, find the row for the user whose password you want to reset.
3) In the user row, select **Actions**, and then select **Reset password**.

After confirming, the user will receive an email with a link to reset their password.

Tips

- Verify individual license usage by referencing the date in the **Last logged in** column from the **Users** tab.

Add an Office

Listing your organization's offices can help expand your organization's reach in Preconstruction.

To add an office:

1) On the user menu, select **My organization**.
2) On the **My organization** page, on the **Offices** tab, select + **Add**.
3) In the **Add office** panel, in the **Details** area, enter the information for your office.
4) In the **Office users** area, select the users who operate out of the office you're adding.
5) Select **Add**.

Delete an Office

If you want to remove an office from your organization's profile, you can delete it. You may want to do this if the office has closed, moved, or is otherwise no longer available.

You cannot delete an office if an invitation to submit a proposal has already been sent to the office or if an open opportunity has been accepted from that office.

If a user in your organization is associated with the deleted office and no other offices, then that user's **Office** location will change to the default corporate office.

To delete an office:

1) On the user menu, select **My organization**.
2) On the **Offices** tab, in the row for the office that you want to delete, select ••• **Actions**, and then select **Delete**.

Add Testimonials (General Contractors and Premium Subcontractors)

Use testimonials to make your organization stand out to potential tenderers or general contractors.

Premium Feature

If you are a subcontractor, you need a Premium subscription to add testimonials.

You should treat testimonials as direct quotes. Make sure they're accurate, and make sure all appropriate approvals have been made beforehand.

To add a testimonial:

1) On the user menu, select **My organization**.

2) On the **My organization** page, on the **Testimonials** tab, select + **Add**.
3) On the **Add testimonial** panel, complete the **From** and **Date received** fields, and in the **Message** text area, enter the testimonial.
4) Select **Add**.

Open Opportunities

Sometimes you don't want to wait for a general contractor to send you an invitation to tender. Instead, you may want to reach out to them. That's when the **Open Opportunities** page is particularly useful.

It includes open opportunities that general contractors have made publicly visible to subcontractors. You can view open opportunities by project, which is the default view, or by tender package for a more granular view.

You can filter open opportunities by location, project value, and project category to show the opportunities where your organization can really shine. Just select **Filters** to change the criteria the application uses to build your open opportunity list. Reorder opportunities and resize column width to fit your preference.

Premium Feature

Subcontractors with Premium access can see whether an opportunity is part of a project that has already been awarded to the general contractor.

For example, let's say an open opportunity covers plumbing in a new office building. Knowing that the overall office building project has already been awarded to the general contractor could make the opportunity for the plumbing work more valuable to the subcontractor. With Premium access, the subcontractor can see this information and plan their proposal accordingly.

If you are a subcontractor who does not have Premium access, the **Awarded Status** field displays **Lock** with no information.

Another perk for subcontractors with Premium access is the ability to view tender history with an organization or general contractor who invited you to tender on a project.

For example, you might be curious to see how many times you've bid for an opportunity with the same organization, how many times you've received an invitation to bid, or what your quote rate is. This information is useful if you'd like to improve your rating with a general contractor and open yourself up to more opportunities.

Review an Open Opportunity

You can review open opportunities that general contractors have made publicly visible.

After reviewing an open opportunity, you can choose to tender on it. You can also create RFIs to ask the general contractor to provide more information.

To review an open opportunity:

1) Navigate to the **Open opportunities** page. This page lists all open opportunities that general contractors have made publicly available to subcontractors. The default view is by project, but you can choose to browse by tender package for a more granular view of opportunities. Select the **Packages** option to view opportunities by tender package.

   Each opportunity displays information columns which will vary slightly depending on whether you are viewing by project or by package.

2) To narrow the list of open opportunities by criteria like location and category, select **Filters**.

   In the filter dialog box, **Location (office)** refers to the office location of your company that you will use to specify the **Service area**. This is how far your company is willing to travel from the office location to a project. The value you enter here will remove opportunities that are farther away from the specified office location. The distance format defaults to your local data center standards: miles (US/Canada) or kilometers (AU).

   Select **Apply**.

   Further refine the **Open opportunities** list by selecting one of the column headers which sorts the list according to the category you select. For example, if you want to see opportunities that are in specific locations, select **Project location**, and all of the opportunities are sorted by their location sites.

3) On the **Open opportunities** page, select an open opportunity. If you are in the default **Projects** view, selecting a project will expand a list panel to the right of the application page containing all tender packages associated with that specific project. If you are in the **Packages** view, you will automatically view all tender packages associated with every project opportunity.

   Here you can review the opportunity. Remember, the opportunities you see on the **Open opportunities** page are general calls for proposals. The organizations that post these opportunities may already have a relationship with your organization, but they may not. Make sure you thoroughly review open opportunities so you can craft your proposals accordingly.

   If you are a subcontractor with Premium access, you can view your history with a general contractor organization by selecting a specific opportunity and expanding **Details**. You will be able to see the number of invitations you've received to tender, as well as the number of times you've submitted a tender. This information is useful if you're trying to improve your rating with a general contractor or gain more visibility.

   To view a full list of files associated with an opportunity, select **Maximize** to maximize to a full page view. If you need to review a file attachment after exiting the application, you can download it locally.

4) After you have reviewed the opportunity, you can choose to accept it, place a tender, or submit an RFI.

> **Note**: All times and dates display in the user's time zone. That means all project and opportunity-related dates are updated to display in your local time.

Tips

- Resize columns by using your pointer to select the divider between column headers, then dragging it to the preferred location.

My Opportunities

View a list of all opportunities to which you have been invited to submit a tender by a general contractor. Select a tender to view more information about it, submit a tender, or review a tender that you already submitted.

My Opportunities Overview

As a subcontractor, the **My Opportunities** page is your landing page when you log into Oracle Preconstruction. Here you view a list of all of your tender opportunity invitations from general contractors. As a general contractor, select **My Opportunities** to view a list of the opportunities that you have in process.

The opportunities list can be filtered to display the opportunities that meet the criteria you select. Simply select the filters beneath the search bar to narrow your list.

You can filter by the **Opportunity status**— **Undecided**, **Accepted**, **Declined, Closed**, and/or **Awarded**, or filter by **Project status** to only display **Awarded projects**. You may also find it useful to sort by submission status or view opportunities that have not received a response here.

> **Note**: If you are a subcontractor who does not have Premium access,
> the **Awarded Status** field displays **Lock** with no information.

Select a tender package from the list of opportunities to view all of the available information that you may need to consider before making a decision. Everything that the general contractor provided is organized by a series of tabs:

- **Overview**: View all basic information about a tender package, including the due date, organization, project value, contact information, project description, and other relevant details from a high level view. You can also accept it, decline it, or mark it undecided from this page.
- **Files**: View all files and folders associated with tender packages. Use the search field to find specific files or folders. Type the name of the item that you need, then select Files or Folders to specify your search.
- **Tender**: View tender submission instructions and formalize your tender. You can also change the status and submit your tender from this page.
- **Messages**: View all messages associated with the opportunity.
- **RFIs**: Send the general contractor an RFI if you need more information about a project or tender package.
- **Addenda**: View a complete list of addenda that were made to a tender package.
- **Team**: View members of the opportunity team and adjust their level of participation in the tender package.

Accept an Opportunity

After receiving and reviewing an invitation to tender, accept it to inform the general contractor that you plan to submit a tender.

This is different from actually submitting a tender. It simply informs the general contractor that you intend to submit a tender, and you can still decline the invitation to tender or change your response to Undecided.

To accept an invitation to tender:

1) On the **My opportunities** page, select a tender package.

   Make sure the filters are set to include all opportunities for which you may want to submit a tender.

2) You can accept an opportunity in one of three ways:
   - On the **My Opportunities** page, select **Accept** in the ⋯ **Actions** menu.
   - On the **Opportunity** page, review the tender package and select **Accept**.
   - In your email invitation from Oracle Preconstruction, select: **Yes, I Will Bid**, **Undecided**, or **No, I Decline**. Selecting one of these options opens a link to the opportunity page in Preconstruction.

Tips

- Reorder opportunities by selecting the arrows in each column header and adjust column width by clicking-and-dragging the line between column headers to the left or the right.
- To view a full list of files associated with an opportunity, select **Maximize** to maximize to a full page view. You can also resize file data columns by using your pointer to select the divider between column headers, then dragging it to the preferred location.

Decline an Opportunity

After receiving and reviewing an invitation to tender, you can decline it to inform the general contractor that you do not plan to submit a tender.

While the general contractor will be able to see that you declined the invitation, you can change your organization's status to Accepted or Undecided later.

To decline an invitation to tender:

1) On the **My opportunities** page, select a tender package.

   Make sure the filters are set to include the relevant opportunities.

2) On the **Opportunity** page, review the tender package and select **Decline**.

Tips

- You can also decline an opportunity on the **My opportunities** page. In the row for the opportunity that you want to decline, in the ⋯ **Actions** menu, select **Decline**.
- To view a full list of files associated with an opportunity, select **Maximize** to maximize to a full page view. You can also resize file data columns by using your pointer to select the divider between column headers, then dragging it to the preferred location.

Mark a Tender Package Undecided

There are two reasons to mark a tender package Undecided. The first is that it makes it easier for you to find later, after you've decided whether to accept the opportunity. The second is that it informs the general contractor that you are still making up your mind.

To mark a tender package undecided:

1) On the **My opportunities** page, select a tender package.

   Make sure the filters are set to include the relevant opportunities.

2) On the **Opportunity** page, select **Undecided**.

Tips

- You can also mark an opportunity undecided on the **My opportunities** page. In the row for the opportunity that you want to mark undecided, in the *** **Actions** menu, select **Undecided**.
- To view a full list of files associated with an opportunity, select **Maximize** to maximize to a full page view. You can also resize file data columns by using your pointer to select the divider between column headers, then dragging it to the preferred location.

Submit a Tender

After you accept an invitation to tender, you can submit your tender.

After you enter your submission information, you can save your tender before submitting it. This is helpful if you want to save your progress on a submission without sending it back to the general contractor just yet.

To submit a tender:

1) On the **My opportunities** page, select a tender package.

   Make sure the filters include opportunities with a Status of **Accepted**.

2) On the **Quote** tab, in the **Quote amount** field, enter the amount for your tender.
3) In the **Description** field, summarize your organization's main tasks and responsibilities for the job.
4) In the **Files** area, add any files that were requested by the general contractor or that you otherwise want to send along with your tender, such as specially formatted proposals or material specifications. You can drag-and-drop files or add them manually.
5) If you want to save your tender before submitting it, select **Save**.

   After that, you can navigate away from the the Opportunity page without losing the information you've already provided.

6) Review all information provided in the tender package, including any addenda in the A**ddenda** tab. Check the checkbox beneath the **Description** field to confirm that you reviewed any addenda associated with the opportunity. When general contractors review quotes, they will see a red indicator beside the tenderer name to alert them if all addenda have not been reviewed.
7) When you're ready to send your tender to the general contractor for consideration, select **Submit**.

Note: You will receive an error message if you attempt to upload a file that—

- Is an unsupported file type
- Exceeds 500MB in size
- Has a filename that contains the following special characters: ?*<>_|:\/"%
- Has a filename that exceeds 255 characters

Tip

- You can revise your bid if you need to make changes after you submit it. If you do make changes, a revision number will be added to your bid. See Revise a Proposal (on page 49).
- To view a full list of files, select **Maximize** to maximize to a full page view. You can also resize file data columns by using your pointer to select the divider between column headers, then dragging it to the preferred location.

Revise a Tender

You can revise a tender that you have already submitted. When you revise a tender, the general contractor is informed of the revision and the updated information is saved.

To revise a tender:

1) On the **My opportunities** page, select a tender package.

   Make sure the filters are set to include submitted opportunities.
2) On the **Opportunity** page, on the **Quote** tab, select **Revise Quote**.
3) Enter your revised tender information.
4) Select **Submit**.

View Messages Related to a Tender Package

General contractors can send subcontractors messages related to tender packages.

To view these messages:

1) On the **My opportunities** page, select a tender package.
2) On the **Opportunity** page, select the **Messages** tab.

Tips

- You can download all attachments included with messages from the **Messages** tab.

Create an RFI for a Tender Package

If you need more information about a project or tender package, you can send the general contractor an RFI.

When you submit an RFI, the general contractor will receive an email notification and can respond in the application.

To create an RFI:

1) On the **My opportunities** page, select a tender package.
2) On the **RFIs** tab, select **Create**.
3) Enter information about the RFI and attach any relevant files.
4) Select **Send**.

> **Note**: You will receive an error message if you attempt to upload a file that—
>
> - Is an unsupported file type
> - Exceeds 500MB in size
> - Has a filename that contains the following special characters: ?*<>_|:\/"%
> - Has a filename that exceeds 255 characters

View an Addendum to a Tender Package

You can view a complete list of addenda that were made to a tender package from the **Addenda** tab.

The list of addenda is sorted by the date an addendum was published from most recent to oldest. If there have been no addenda, the tab provides no information.

To view an addendum:

1) Navigate to **My Opportunities** and select a tender package.
2) Select the **Addenda** tab to open a list of addenda published for the tender package.
3) Select the addendum you would like to view. You can search by subject or contact name from the search bar at the top of the page.

   The addendum opens in a panel on the right of the application screen. Here you can view the contact information for the person who submitted the addendum, the summary, general package updates, and a list of files available for download.

   Information displays in a two-column view for a quick visual comparison:

   - **Package Updates**: Name, Due Date, Contact, Trades, and Instructions display in a side-by-side comparison view between new values and old values for quick reference.
   - **File Updates**: Each file displays in a list with a status indicating whether it was newly added, revised, or removed from the addendum.

See also ***Download a New File in an Addendum*** (on page 35).

Tips

- Subcontractors will be prompted to confirm that they have reviewed all addenda associated with a tender package when responding to a tender invitation. When general contractors review quotes, they will see a red indicator beside the tenderer name to alert them if all addenda have not been reviewed.

Download a New File in an Addendum

To save a file locally, you can download any file that has been attached to an addendum.

To download a new or updated file from an addendum:

1) Navigate to **My Opportunities** and select a tender package.
2) Select the **Addenda** tab to open a list of addenda published for the tender package.
3) Select the addendum you would like to view. You can search by subject or contact name from the search bar at the top of the page.

   The addendum opens in a panel on the right of the application screen. Here you can view the contact information for the person who submitted the addendum, the summary, general package updates, and a list of files available for download.
4) In the **File Updates** area, review the list of recently modified files. Each file displays a status of **Added**, **Revised**, or **Removed** to indicate what changed.
5) Select **Download Files** to download any new files locally.

Manage Opportunity Team

If you want to involve additional users from your organization in the tender process for an opportunity, you can assign specific role levels to your team members. If you need to add an unregistered user to your team, start by adding them on the **My Organization** page. See Add a User (on page 25).

To manage an opportunity team:

1) On the **My Opportunities** page, select a tender package.
2) Select the **Team** tab to open a list of team members involved in the opportunity. The number of invited members, administrators, editors, and viewers displays at the top of the page. You can click on these category chips to filter accordingly.
3) Type the name of a user or an office into the search field to find a specific user from your organization.
4) View and adjust their level of participation, if needed. Members who have been invited by the general contractor display an **Invited** badge in addition to their role level. Role level options are Admin, Editor, and Viewer. Names display in alphabetical order from Invited status first, followed by role level.
   - **Admin**: Admin level users for an organization who can interact with the opportunity to view and adjust any tender and team specifics. These users do not have the option to be added as Editors because they already have administrator privileges in Preconstruction and are also editors by default.

     See Administrator Roles and Privileges (on page 8).
   - **Editor**: Users who have been granted permissions to submit and revise tenders, create and respond to RFIs, and manage team details for a specific opportunity. Change an Editor to a Viewer by selecting **Remove Edit Access** beside the user's name.
   - **Viewer**: Users who have access to the opportunity for information purposes only. They cannot edit any opportunity details unless they are given edit access. Change a Viewer to an Editor by selecting **Give Edit Access** beside the user's name.

Respond to an Opportunity from an Email Invitation

You can quickly respond to an opportunity to tender using a response link in the email invitation that you receive for a tender package.

This is different from actually submitting a tender. It simply informs the general contractor about your intentions and changes the status. You can still change your response from within the application on the opportunity page.

To respond to an opportunity from your email invitation to tender:

1) Open your email invitation from Oracle Preconstruction. Review basic information about the opportunity, such as the tender package name, location, and due date.
2) Choose your response from the three options in the email body: **Yes, I Will Bid**, **Undecided**, or **No, I Decline**. Selecting one of these options opens a link to the opportunity page in Preconstruction.
3) Ensure that you are logged in using your credentials, then confirm your response using the dialog box that displays.

Reports

Use the **Reports** page to download tenderer history reports and tenderer status reports.

Bidder History Reports

Bidder history reports are Excel spreadsheets that show detailed statistical information about all of the subcontractors invited to tender on your projects. Fields include Total Invites Sent, Awarded, and Submitted, among others.

Bidder Status Reports

Bidder status reports are project-specific Excel spreadsheets that include information about the companies invited to tender on particular projects.

All Projects

Select the Tenders tab to open the **All projects** page. It lists all of the projects to which you have access as a general contractor, and it serves as your landing page when you log into Oracle Preconstruction.

The **All projects** list can be filtered to display the opportunities that meet the criteria you select. Simply select the filters beneath the search bar to narrow your list. You can filter by **Active**, **Closed**, **Hidden**, and/or **Awarded.**

Add a Project

The first step to managing a project in Preconstruction is to add it.

To add a project:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select + **Add**.
3) On the **Project details** step, enter the information for your project.
   - **Closing date**: The default due date for tender packages in the project.

     You can set a specific tender package due date instead of using the default closing date, if, for example, you'd like to gather all incoming tender information prior to the default project closing date assigned here.

     Select the specific tender package you'd like to change, then edit **Details**. Change the **Due Date** to the date you'd prefer to receive all tenders for that package.

     Reference Add a Single Tender Package (on page 39).
   - **Tender contact**: The user who is responsible, by default, for correspondence and management of tender packages in the project. The user you choose here will determine who is automatically set as the tender contact for each tender package in the project, but you can select a different contact for each tender package.

     If the user who you want to choose does not appear in this list, it is probably because that user has not yet been added to Preconstruction as a user.

     Add a User (on page 25)
   - **Category**: The type of work the project involves.
   - **Project value**: The estimated value of the whole project.
   - **Location**: The location of the project. For example, the building or renovation site.
   - **Awarded Status**: You should only select **Yes** here if—
     - The project has already been awarded to your organization, and—
     - You want subcontractors who you invite to tender to see that the project has been awarded and the date that it was awarded. All opportunities related to that project will reflect an Awarded status.

     When this is set to **Yes**, subcontractors who receive invitations to tender will see that the project on which they may tender has already been awarded. This may give them more motivation to tender. When this is set to **No**, they receive no information about whether the project has been awarded.
4) Select **Next**.
5) If you do not want all users in your organization to have unrestricted access to the project, deselect **Allow access to all users in your organization for this project**. Otherwise, leave it selected.
6) If you chose to restrict user access, select + **Add** and choose the users who you want to have access to the project.
7) Select **Add**.

Tips

- You can edit the details of a project after adding it. Open the project, navigate to the **Project details** page, and select **Edit**.

Close a Project

If a project is completed or otherwise inactive, you can close it. Subcontractors cannot place new tenders on closed projects, but they can filter them out when viewing projects.

You can reopen a project after you have closed it.

To close a project:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, in the row for the project that you want to close, select ••• **Actions**, and then select **Close**.

Tips

- To reopen a closed project, select ••• **Actions**, and then select **Re-open**.

Copy a Project

You can copy a project to quickly set up a new project with the same general settings and tender packages.

To copy a project:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, in the row for the project that you want to copy, select ••• **Actions**, and then select **Copy project**.
3) In the **Copy project** dialog box, enter the **Name** of the project and its **Closing date** and select **Copy**.

   Now you can add and edit the information of the new project as you would for any other project.

Hide a Project

To keep your list of projects relevant, you can hide projects that you no longer need to view in the projects list. All closed and inactive projects will remain in your list of projects unless you individually hide them in the list.

You can still search for hidden projects and view project specifics for historical information. You can also reactivate hidden projects.

To hide a project:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, in the row for the project that you want to hide, select ••• **Actions**, and then select **Hide**.

Tips

- To restore a project to your list of projects, select ⋯ **Actions**, and then select **Move to Active**.

View Details

When you select a project, the **Project details** page appears. These tabs include all of the information about the project. The **tender packages** tab shows all of the tender packages associated with the project.

Project Details

The **Project details** tab includes basic information about the project.

> **Note**: All times and dates display in the user's time zone. That means all project and opportunity-related dates are updated to display in your local time.

Edit Project Details

If you have administrator rights, you can edit the details of any project, including general details, awarded status, and project access for users in your organization.

Any time you make changes to a project's details, those updates will be automatically reflected in the corresponding opportunity.

To edit project details:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the Project details page, select **Edit**.
4) Edit the project details.
5) Select **Save**.

Tender Packages

Add, manage, and view all tender packages for a project.

Add a Single Tender Package

A tender package represents an individual contract for a particular area of work on a project. After you have set up a project, add tender packages to it to represent each area of work for which you are to accept tenders.

To add a tender package:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.

3) On the **Tender Packages** tab, select the **Add** menu, and then select **Add single tender package**.
4) On the **Add tender package** page, enter information about the tender package.
   - **Trade codes**: Choose the trade code or trade codes that represent the kind of work covered by the tender package. Remember, tender packages are what subcontractors submit proposals for.

     The set of trade codes available here is determined by the settings of the project.
   - **Name**: The name of the tender package. By default, this is the name of the first trade code that you choose in the **Trade codes** field. You can change it to anything you like, but the name should clearly convey the scope of the tender package.
   - **Tender due date**: This is the date when tenders are due on the tender package.

     The default due date is determined by the project settings, but you can set a tender package-specific due date here.
   - **Tender contact**: This is the user who is responsible for correspondence about the tender package and receives notifications as tenders come in.

     The default contact is determined by the project settings, but you can set a tender package-specific contact here. Contact information such as email and phone number display beneath the contact name.
   - **Tender submission instructions** In this text area, enter any instructions that you want to provide subcontractors when they receive your invitation to tender.
   - **Open opportunity information**: Select **Yes** if you want the tender package to be visible to subcontractors right away. This will not cause the invitation to tender to be sent. You will still have to publish the tender package. With **Yes** selected, any subcontractor using the application will be able to view this tender package. If you prefer to keep it private, it will only be visible to those subcontractors you invite.
5) In the **Attach files to tender package** area, add any necessary or helpful project folders and files.

   You need at least one folder to add a file. Any folders or files you add here will become part of the project's file structure. The file structure is a flat list. You can drag and drop to reorganize folders if there is a specific order that you would like them to be viewed.

   > **Note**: A progress bar displays when you upload a file attachment. The file upload could take some time, depending on its size. If the process will take longer than one minute, you will receive a notification. You can open Preconstruction in another tab to continue working in the application, or you can continue to wait until the upload is complete.

6) If you want to add another package right after you add this one, select **Add Another** in the **Add tender package** page heading.

   With this option selected, you will return to the blank **Add tender package** page right after you add this one.
7) Select **Add**.

Note: You will receive an error message if you attempt to upload a file that—

- Is an unsupported file type
- Exceeds 500MB in size
- Has a filename that contains the following special characters: ?*<>_|:\/"%
- Has a filename that exceeds 255 characters

Add Multiple Tender Packages

You can quickly add multiple tender packages for several trade codes at once.

When you add tender packages this way, each one is automatically named after its respective trade code. You can, however, change the name of each tender package later.

To add multiple tender packages:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Tender Packages** tab, select **Add** ▾, and then select **Add multiple tender packages**.
4) On the **Add multiple tender packages page**, on the **Details** step, enter information about the tender package.

   In the **Trade codes** field, add each trade code for which you want to add a new tender package.

   In the **Open opportunity information** area, select **Yes** if you want the tender package to be visible to subcontractors right away. This will not cause the invitation to tender to be sent. You will still have to publish the tender package.
5) Select **Add**.

Publish a Tender Package

Publish a tender package to send tender invitations to potential tenderers included on it.

To publish a tender package:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Tender Packages** tab, select a tender package.
4) On the **Bidders** tab, review the list of potential tenderers.

   If you'd like the tender package to only be sent to specific potential tenderers, deselect all using the check box in the list header, and manually select only the check boxes for those who should receive your tender package.
5) Select **Publish**. If you did not make any changes to the list of recipients, invitations will be sent to all uninvited tenderers in the list.

Review a Tender Package

Review your tender packages throughout the tender cycle to keep track of tenders and RFIs as they come in.

To review a tender package:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Tender Packages** tab, select a tender package.

   Check the **Tenders** tab to view and compare incoming tenders. Check the **RFIs** tab to view RFIs submitted by subcontractors.

   Each organization in the Tenders list and the RFI list displays the number of users invited to tender as well as the most recent date of invitation.

> **Note**: A revision number displays on both the summary card and in the details panel on the **Tenders** tab indicating the revision history.

Close a Tender Package

If you want to effectively cancel a published tender package without awarding it to any subcontractor, you can close it.

You can only close a tender package that has been published and not awarded. If you want to get rid of an unpublished tender package, you can delete it.

To close a tender package:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Tender Packages** tab, select a tender package.
4) Select **More** ▾, and then select **Close**.

Delete an Unpublished Tender Package

If you no longer need a tender package that you have not published, you can delete it.

To delete an unpublished tender package:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Tender Packages** tab, select the checkbox for any unpublished tender package that you want to delete.
4) Select **Actions** ▾, and then select **Delete**.

Overview

View basic information about the tender package.

Modify a Published Tender Package Addendum

If you have already published a tender package but want to make changes to its overview information, you can edit it and then publish an addendum.

To publish an addendum to a published tender package:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Tender Packages** tab, select a tender package.
4) On the **Overview** tab, make any changes. You can add emphasis to your message, or highlight changes to you've made, by formatting your text using basic text and list formatting, such as bold, Italics, and bullets.
5) Select **Save**.
6) Select **Publish Addenda**.

Tips

- To manage additional tender package details before finalizing your addenda, you can also send invitations and publish pending addenda on the **Bidders** tab. Select **Publish Addenda**, **Preview Invitation**, or **Send Invitations** from the page header options to manage those tasks quickly without navigating back to the **Overview** tab.

Files

View and edit files and folders associated with tender packages.

The processes for working with files at the tender package level are almost the same as at the project level. There are, however, some limitations. For example, you can't delete a file at the tender package level, and you can't view the allocation matrix for all files at the tender package level. Also, file folders are arranged in a flat structure and cannot be embedded. You can drag and drop folders to reorder them.

You can, however, perform the most basic file-related tasks you will probably need to perform while working with tender packages.

Folders with documents that have been updated display an orange indicator beside the folder name. A label beside the specific document name specifies whether the document has addenda pending.

Tips

- To view a full list of files, select **Maximize** to maximize to a full page view. Resize columns by using your pointer to select the divider between column headers, then dragging it to the preferred location.

Add a Folder at the Tender Package Level

You can add a file folder from within a tender package record.

Adding a folder in a tender package actually adds it to the project that contains the tender package. It also immediately makes it available in the tender package. Adding a folder here is the same as adding a folder in the project and then allocating that folder to the tender package.

To add a file folder at the tender package level:

1) On the **All projects** page, select a project.
2) On the **Tender Packages** tab, select a tender package.
3) On the **Files** tab, select **Edit**.
4) Select **Add folder**.
5) In the new folder row, enter the name of the new folder and select **Update**.
6) Select **Save**.

> **Note**: You will receive an error message if your folder name contains the following special characters: ?*<>_|:\/"% or exceeds the 255 character limit.

Tip

- Resize the folder pane by using your pointer to click and drag the right edge of the pane, as needed.
- You can drag and drop folders to reorder them. This is useful if you're presenting a tender package with folders and files that need to be reviewed in a specific order.

Delete a Folder in a Tender Package

In a tender package, you can delete an empty folder.

Since you cannot delete a file at the tender package level, you cannot delete a folder at the tender package level if it has files in it.

To delete a folder in a tender package:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Tender Packages** tab, select a tender package.
4) On the **Files** tab, select **Edit**.
5) In the row for the folder you want to delete, select **Actions**, and then select **Delete Folder**.
6) Select **Save**.

Tip

- You can drag and drop folders to reorder them.

Add a File at the Tender Package Level

You can add a file to a project from within a tender package. The maximum file size is 500 MB.

Which file types are supported? Virtually all document file types are supported, but you cannot upload executable, script, or markup files such as .exe, .html, or.vbx files.

Note: You will receive an error message if you attempt to upload a file that—

- Is an unsupported file type
- Exceeds 500MB in size
- Has a filename that contains the following special characters: ?*<>_|:\/"%
- Has a filename that exceeds 255 characters

To add a file at the tender package level:

1) On the **All projects** page, select a project.
2) On the **Tender Packages** tab, select a tender package.
3) On the **Files** tab, select **Edit**.
4) Select the folder to which you want to add the file.
5) Select **Add Files**.
6) In the **Add Files** drawer, add your files in the file area and then select **Add**.

Note: A progress bar displays when you upload a file attachment. The file upload could take some time, depending on its size. If the process will take longer than one minute, you will receive a notification. You can open Preconstruction in another tab to continue working in the application, or you can continue to wait until the upload is complete.

Tip

- You can drag and drop folders to reorder them.

Upload a File Revision in a Tender Package

You can upload a file revision in a tender package.

Remember, files are actually stored at the project level, so any changes you make here will affect how the file appears in all tender packages. Folders with documents that have been updated display an orange indicator beside the folder name. A label beside the specific document name specifies whether the document has been newly assigned or has addenda pending.

To upload a file revision at the tender package level:

1) On the **All projects** page, select a project.
2) On the **Tender Packages** tab, select a tender package.
3) On the **Files** tab, select **Edit**.
4) In the row for the file that you want to update, select **Actions**, and then select **Upload File Revision**.
5) In the **Upload File Revision** dialog box, add your files in the file area and then select **Add**.

   The revised file that you upload here must have the same name as the original file it is replacing.

Note: A progress bar displays when you upload a file attachment. The file upload could take some time, depending on its size. If the process will take longer than one minute, you will receive a notification. You can open Preconstruction in another tab to continue working in the application, or you can continue to wait until the upload is complete.

6) Select **Save**.

Rename a File in a Tender Package

You can rename a file in a tender package.

Remember, files are actually stored at the project level, so any changes you make here will affect how the file appears in all tender packages. Folders with documents that have been updated display an orange indicator beside the folder name. A label beside the specific document name specifies whether the document has addenda pending.

To rename a file:

1) On the **All projects** page, select a project.
2) On the **Tender Packages** tab, select a tender package.
3) On the **Files** tab, select **Edit**.
4) In the row for the file that you want to rename, select **Actions**, and then select **Rename File**.
5) Select **Save**.

Note: You will receive an error message if your file name contains the following special characters: ?*<>_|:\/"% or exceeds the 255 character limit.

Download a File in a Tender Package

From within the tender package, you can download a file to view and update it offline.

To download a file:

1) On the **All projects** page, select a project.
2) On the **Tender Packages** tab, select a tender package.
3) On the **Files** tab, select **Edit**.
4) In the row for the file that you want to download, select **Actions**, and then select **Download File**.

Bidders

The Bidders tab lists all subcontractors who have been added as tenderers to the tender package. It includes each tenderer's status and basic information such as organization affiliation, contact information, and the last date of invitation to tender. You can also manage unsent invitations and publish pending addenda on the Bidders tab. Select **Publish Addenda**, **Preview Invitation**, or **Send Invitations** from the page header options to manage those tasks quickly without leaving the **Bidders** tab.

Add Potential Bidders to a Tender Package

After you have set up a tender package, add the contacts who you want to be invited to tender on it.

To add potential tenderers to a tender package:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Tender Packages** tab, select a tender package.
4) On the **Bidders** tab select + **Add**.
5) On the **Add tenderers** page, use the tabs to choose tenderers:
   - **Search directory**: On this tab, first select how you want to search for potential tenderers. There are two choices:
     - **Search My Organization Directory**: Your organization directory includes any organizations that have been imported or added by administrators in your organization. With this option selected, use the filters to search for organizations in your organization directory.

       Some known information, such as location and trade code information, is pre-populated and will display by default in the associated fields as you edit your other search criteria.
     - **Search the Preconstruction Directory**: Use the filters to search among all organizations that have Preconstruction profiles and that have opted to have their profiles publicly visible.

       You can modify the location proximity to widen or narrow the search for bidders by selecting Any location, Project location, Offices, or a Custom location of your choosing.

     Search results display in alphabetical order with bidders that fully match your search criteria first, followed by partial matches. Contact information such as email and phone number display beneath the tenderer name for quick reference.
   - **Invite by Email**: On this tab, invite potential tenderers by email. In the search field, enter a comma-separated list of email addresses and select **Add**. Then, select each email address to which you want to send an invitation to tender and select **Add** again. You will be able to see the most recent date of invitation and number of invitations sent in the Bidders tab after you send them.
   - **Add organization**: On this tab, you can directly add a new subcontractor organization to your network and invite them to tender. Simply fill out the required fields and the organization will receive an invitation to join Preconstruction and tender on your project.
   - **Copy from project**: Use this tab if you want to add tenderers from a different tender package in the present project or a tender package in a different project. Select a project, select a tender package, and then select **View Bidders**. Then, select all tenderers who you want to invite for this tender package and select **Add**.
6) Select **Add**.

Tips

- Contacts in your list who have not received your invitation email display an indicator warning in the Contact column. On the **View details** page, on the **Contacts** tab, you can see the email addresses for specific users who did not receive your email. Edit the email addresses, invite the users again, or delete the contacts.

Add a Note About a Bidder

You can add notes about tenderers to keep detailed information about them and their tender.

To add a note about a tenderer:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Tender Packages** tab, select a tender package.
4) On the **Bidders** tab, in the row for the tenderer for which you want to make a note, select + **Add note**.
5) In the **Notes** dialog box, enter your note and select **Save**.

After you have added a note, select **Edit note** in the tenderer row to edit notes.

Quotes

The Quotes tab is where you view and manage tenders as they are submitted. You can also revise and add tenders on behalf of subcontractors on the Quotes tab.

Add a Tender on Behalf of a Subcontractor

If a potential tenderer has a profile in the application but can't submit their tender through the application, you can do it for them.

> **Note**: You should only submit a tender on behalf of a tenderer with their knowledge and approval.

To add a tender on behalf of a subcontractor:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Tender Packages** tab, select a tender package.
4) On the **Quotes** tab, select + **Add**.
5) In the **For** list, select the tenderer on whose behalf you want to add the tender.
   Only potential tenderers listed on the **Bidders** tab are available here.
6) Add an **amount** and **Description**.
7) In the **Attach files** area, add any relevant tender documentation from the tenderer.

Award a Tender Package

When you have decided which proposal best meets the needs of your project, you can award a tender package. The subcontractor will receive a notification email.

Note: After you have awarded a tender package, you cannot rescind your decision in the application or revise the tender package.

To award a tender package:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Tender Packages** tab, select a tender package.
4) On the **Quotes** tab, in the tile for the tender that you want to award, select **Award**.

   If you want to see more information about the tender before awarding it, select **View Details**.

Revise a Proposal

You can revise a proposal on behalf of a tenderer.

Note: You shouldn't revise a tenderer's proposal without their knowledge or permission. When you revise a tender, the tenderer receives a notification that shows your changes.

To revise a proposal:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Quotes** tab, select a tender package.
4) On the **Quotes** tab, in the tile for the tender that you want to revise, select **Revise**.
5) On the **Revise tender** page, make your revisions.
6) Select **Revise**.

   After you revise a proposal, the revision number displays on both the summary card and in the details panel.

Review Proposals

As tenderers submit proposals for a tender package, you can review all of them side-by side on the Tenders tab.

To review a proposal:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Tender Packages** tab, select a tender package.
4) On the **Quotes** tab, review the summary information of all submitted tenders, including the **Lowest**, **Median**, and **Highest** tenders.

5) Review the information for each tender in the tender summary cards. You will be able to see the organization, most recent date of invitation, and number of invitations sent, as well as other basic information. Each organization is prompted to confirm that they have reviewed all associated addenda before submitting a tender. As a general contractor, you will see a red indicator beside the tenderer name if all addenda have not been reviewed.

   To see more information about a tender, select **View Details**.

   You can also ***Award a Tender Package*** (on page 49) or ***Revise a Proposal*** (on page 49) on behalf of a Bidder. If the proposal has been revised, the revision number displays on both the summary card and in the details panel.

Messages

On the Messages tab, you can write and send messages to any combination of subcontractors who have been invited to tender on a tender package.

Send a Message to Subcontractors in a Tender Package

If you have published a tender package, you can send a message to any tenderers who have been added to the tender package. Messages appear in subcontractors' email inboxes from the sender noreply@preconstruction.oraclecloud.com.

Bidders cannot respond to these messages. The only kind of two-way messaging that occurs between general contractors and subcontractors in Preconstruction is through RFIs.

When you send subcontractors a message, they will receive a notification in the application and by email. They can preview the names of attached files in the email notification, but they will need to log into the application to download them locally.

To send a message to subcontractors in a tender package:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Tender Packages** tab, select a tender package.
4) On the **Messages** tab, select **Create** and choose the subcontractors who you want to receive the message.

   To send messages to several recipients quickly, you can choose common grouping options for subcontractors you've included in the tender package. Options include all tenderers, all tenderers excluding those who've declined, or more specific options are available from **Select tenderers**. For example, you may need to alert subcontractors that you've made some changes to your tender package details, but those who aren't interested don't need to receive the update.

   The option you select here simply populates the **To** field in the next step, where you can add other contacts individually, if needed.

5) On the **Create message** page, in the **To** field, add any other recipients.

   You can only add contacts who have already been added as potential tenderers to the tender package.

6) Add the **Subject**, your **Message**, and any **Files** you want to include with the message. You can add emphasis to your message, or highlight important information, by formatting your text using basic text and list formatting, such as bold, Italics, and bullets.

You can send file attachments to the tenderers in a project for all tender packages, or you can specify a single tender package, if only certain tenderers need additional information and files.

Select **Preview** to see what the message will look like to its recipients. If you send any file attachments, the recipients will be able to download them from the **Messages** tab.

7) Select **Send**.

Tips

- On the **Messages** tab, you can search for messages that have already been sent. In the **Search** field, you can also select **Filters** to filter the messages list by specific bidders.

RFIs

The RFIs tab lists RFIs as they are submitted by subcontractors invited to tender on the open tender package. You can respond to these RFIs with relevant information and files.

Respond to an RFI in a Tender Package

Subcontractors who need more information can send you RFIs. You can respond to RFIs with additional information and files.

When you respond to an RFI, the subcontractor receives a notification and can review your response in the application.

Whenever a subcontractor sends you an RFI, you will receive an email notification that includes a link to the RFI. You can also navigate to your RFIs in the application. From the RFI tab you can see a list of RFIs displaying the subject, followed by the sender's name and the associated organization, as well as the Bid Package and date of receipt. Selecting a specific RFI expands additional information including the sender's contact information and timestamped communication details.

To respond to an RFI in a tender package:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Tender Packages** tab, select a tender package.
4) On the **RFIs** tab, select RFI.

   This tab shows RFIs that have been submitted by subcontractors who have been invited to this tender package.
5) To respond to an RFI, select **Click here to reply**.
6) Enter your response and attach any files related to the RFI.
7) Select **Send**.

History

The History tab shows all of the important activity that has happened in a tender package. Select an event row to view more detailed information about the event. You can select the events you want to include in the list, or select **Clear filters** to show all events.

Files

View, manage, and add files related to a project. You can manage files and folders, and you can allocate folders to tender packages. Folders with documents that have been updated display an orange indicator beside the folder name. A label beside the specific document name specifies whether the document has addenda pending.

Add a Folder to a Project

In order to add files to a project, it must first have at least one folder.

Folders make it easier for you to organize files, and they make it easier for subcontractors to find them.

To add a folder to a project:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Files** tab, select + **Add folder**.
4) In the new folder row, enter the name of the new folder and press **Enter** or select ✓ **Update**.

> **Note**: You will receive an error message if your folder name contains the following special characters: ?*<>_|:\/"% or exceeds the 255 character limit.

Tips

- Resize the folder pane by using your pointer to click and drag the right edge of the pane, as needed.
- You can drag and drop folders to reorder them. This is useful if you're adding folders and files that need to be reviewed in a specific order.

Rename a Folder

You can rename project folders.

To rename a folder:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Files** tab, select ··· **Actions**, and then select **Rename Folder**.

   Alternatively, you can double-click the name of the folder to make it editable.

Note: The following special characters are not supported and cannot be used in folder names: ?*<>_|:\/"%.

Tips

- After you rename folders, you can choose to keep the default sorting order, or drag and drop to rearrange them if you need folders and files to be reviewed in a specific order.

Delete a Folder

If you no longer need a folder for a project or any of the tender packages it contains, you can delete it.

To delete a folder:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Files** tab, in the row for the folder you want to delete, select ⋯ **Actions**, and then select **Delete Folder**.

Add a File to a Project

You can add a file at the project level to make it available for use in any tender packages within the project. The maximum file size is 500 MB.

Which file types are supported? Virtually all document file types are supported, but you cannot upload executable, script, or markup files such as .exe, .html, or.vbx files.

Note: You will receive an error message if you attempt to upload a file that—

- Is an unsupported file type
- Exceeds 500MB in size
- Has a filename that contains the following special characters: ?*<>_|:\/"%
- Has a filename that exceeds 255 characters

To add a file to a project:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Files** tab, select a folder.
4) Select + **Add Files**.
5) In the **Add files** panel, add your files in the file area and then select **Add**.

   You can browse for files or drag and drop them.

Note: A progress bar displays when you upload a file attachment. The file upload could take some time, depending on its size. If the process will take longer than one minute, you will receive a notification. You can open Preconstruction in another tab to continue working in the application, or you can continue to wait until the upload is complete.

Tips

- You can drag and drop folders to reorder them if your files and folders need to be reviewed in a specific order.

Upload a File Revision

If a file has changed and you want to update it, you can upload a file revision. This updates the file's **Revision**. In order to upload a revised file, the updated file must have the same name as the existing file. Folders with documents that have been updated display an orange indicator beside the folder name. A label beside the specific document name specifies whether the document has addenda pending.

Note: You will receive an error message if you attempt to upload a file that—

- Is an unsupported file type
- Exceeds 500MB in size
- Has a filename that contains the following special characters: ?*<>_|:\/"%
- Has a filename that exceeds 255 characters

To upload a file revision:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Files** tab, select a folder.
4) In the row for the file that you want to update, select ••• **Actions**, and then select **Upload File Revision**.
5) In the **Upload File Revision** panel, add your files in the file area and then select **Add**.

Note: A progress bar displays when you upload a file attachment. The file upload could take some time, depending on its size. If the process will take longer than one minute, you will receive a notification. You can open Preconstruction in another tab to continue working in the application, or you can continue to wait until the upload is complete.

Rename a File

You can rename a file.

To rename a file:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Files** tab, select a folder.

4) In the row for the file that you want to rename, select **Actions**, and then select **Rename File**.

   Alternatively, double-click the name of the file.

5) In the **File Name** field, enter the new file name and select **Update**.

> **Note**: You will receive an error message if your file name contains the following special characters: ?*<>_|:\/"% or exceeds the 255 character limit.

Delete a File

You can delete a file. Doing so will remove it from any tender packages to which it was allocated.

To delete a file:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Files** tab, select a folder.
4) In the area that lists the files in the folder, select the check box for all of the files that you want to delete.
5) Select **Delete**.

Download a File

You can download a file to view and update it offline.

To download a file:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Files** tab, select a folder.
4) In the area that lists the files in the folder, select the check box for all of the files that you want to download.
5) Select **Download**.

Export Project Files to Aconex

If your team uses Preconstruction and Aconex, you may need to make the files in a Preconstruction project accessible in Aconex. You can quickly export project files to any of your Aconex projects without leaving Preconstruction.

To export project files to Aconex:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Files** tab, select a folder.

4) In the area that lists the files in the folder, select the check box for all of the files that you want to export to Aconex.

   To view a full list of files, select **Maximize** to maximize to a full page view. You can also resize file data columns by using your pointer to select the divider between column headers, then dragging it to the preferred location.

5) Select **Export to Aconex**.
6) In the Aconex login dialog box, enter your Aconex login name or work email and select **Sign in to choose an Aconex project**.
7) In the **Select Aconex project** dropdown menu, select the Aconex project to which you want to export the files, and then select **Select**.

   The files will be queued for export to Aconex, and you will receive an email when the export is complete.

View: Project allocation matrix

The project allocation matrix allows you to easily view and determine which files and folders are visible in which tender packages.

Rows correspond to files and folders. Gray rows represent folders, and white rows represent files.

Columns correspond to tender packages.

Each checked cell in the table shows whether the file or folder (left label) is allocated to a tender package (top label).

Check a check box to allocate the corresponding folder or file to the corresponding tender package.

Allocate a File or Folder to a Tender Package

On the **Project allocation matrix** page, you can allocate a folder and its contents or an individual file to a tender package.

To allocate a folder or file to a tender package:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Files** tab, select **View allocation matrix**.

   On this page, rows represent files and folders. Folder rows are gray. File rows are white.

4) Locate the row for the folder or file that you want to allocate.
5) In the row for the folder or file that you want to allocate, select the check box for the tender package to which you want to allocate the folder or file.

   You can also select the left-most cell in the row to allocate the folder or file to all of the tender packages.

   Similarly, if you want to allocate all files and folders to a single tender package, select the top-most cell in the column for that tender package.

6) Select **Save**.

Tips

- Click and drag a box around multiple adjacent cells to check or clear all of them at once.
- Collapse and expand folders to help navigate the page and view associated files more efficiently. This can be at the folder level, or from the table header by selecting the **Expand all** or **Collapse all** icons.

Copy File and Folder Allocations from One Tender Package to Another Tender Package

Let's say you have a tender package that includes the exact mix of files and folders that you want for another tender package. You don't have to scroll around carefully matching check boxes. Instead, you can simply copy the allocations from one tender package column and paste those allocations into a column for another tender package.

To copy file and folder allocations from one tender package and paste them to another:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Files** tab, select **View allocation matrix**.
4) Find the column with the allocations that you want to copy, and right-click the column label, which is the name of the tender package it represents.
5) Select **Copy allocation of [tender package name]**.
6) Find the column to which you want to apply the allocations that you just copied, and right-click on the column label.
7) Select **Paste allocation of [tender package name]**.

   Now, all of the check marks representing file and folder allocations should be identical for both columns.
8) Select **Save**.

Tips

- Collapse and expand folders to help navigate the page and view associated files more efficiently. This can be done at the folder level, or from the table header by selecting the **Expand all** or **Collapse all** icons.

Export File Allocation Matrix

As you manage tender package files, you may want to view a list of files allocated by tender package in another application to print and share them with other members of your organization who may not be Oracle Preconstruction users.

To export an allocation matrix from a tender package to view and print from Microsoft Excel:

1) Select the Tenders tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Files** tab, select **View allocation matrix**.
4) Select **Export** to export the allocation matrix to an Excel spreadsheet file. You will see a confirmation message letting you know that your export was successful.
5) Open Microsoft Excel and navigate to your saved file to view and print it.

Messages

Write and send messages to any combination of subcontractors who have been invited to tender on tender packages in the open project.

Send a Message to Subcontractors in a Project

In a project record, you can send a message to any subcontractors who have been invited to tender on a tender package in the project. Messages appear in subcontractors' email inboxes from the sender noreply@preconstruction.oraclecloud.com. If you choose to include any file attachments with your messages, subcontractors will be able to preview the file names so that they know you've included additional information for them to review.

Bidders cannot respond to these messages. The only kind of two-way messaging that occurs between general contractors and subcontractors in Preconstruction is through RFIs.

When you send subcontractors a message, they will receive a notification.

To send a message to subcontractors in a project.

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **Messages** tab, select **Create** ▾ and choose the subcontractors who you want to receive the message.

   To send messages to several recipients quickly, you can choose common grouping options for subcontractors you've included in the project. Options include all tenderers, all tenderers excluding those who've declined, or more specific options are available from **Select tenderers.** For example, you may need to alert subcontractors that you've made some changes to your project details, but those who aren't interested don't need to receive the update.

   The option you select here simply populates the **To** field in the next step, where you can add other contracts individually.
4) On the **Create message** page, in the **To** field, add any other recipients.

   You can only add contacts who have already been added as potential tenderers to a tender package in the project.
5) Add the **Subject**, your **Message**, and any **Files** you want to include with the message. You can add emphasis to your message, or highlight important information, by formatting your text using basic text and list formatting, such as bold, Italics, and bullets.

   You can send file attachments to the tenderers in a project for all tender packages, or you can specify a single tender package, if only certain tenderers need additional information and files.

   The files you add here are not sent directly to the recipients through email. After receiving the message, they will need to log on to Preconstruction to see linked files. Once in Preconstruction, the recipients will be able to download them from the **Messages** tab.

   Select **Preview** to see what the message will look like to its recipients.
6) Select **Send**.

Tips

- On the **Messages** tab, you can search for messages that have already been sent. In the **Search** field, you can also select **Filters** to filter the messages list by specific tender packages or tenderers.

RFIs

View a list of RFIs as they are submitted by subcontractors invited to tender on tender packages in the open project. You can respond to these RFIs with relevant information and files.

Each RFI is only visible to the general contractor and the subcontractor who submitted it. Others on the project cannot view others' RFIs.

Respond to an RFI in a Project

Subcontractors who need more information can send you RFIs. You can respond to RFIs with additional information and files.

When you respond to an RFI, the subcontractor receives a notification and can review your response in the application. Responses say who they're from. So if two users, for example, in your organization respond to an RFI, the subcontractor will see both, and each will say who wrote it.

Whenever a subcontractor sends you an RFI, you will receive an email notification that includes a link to the RFI. You can also navigate to your RFIs in the application. From the RFI tab, you can see a list of RFIs displaying the subject, followed by the sender's name and the associated organization, as well as the Bid Package and date of receipt. Selecting a specific RFI expands additional information including the sender's contact information and timestamped communication details.

To respond to an RFI at the project level:

1) Select the **Tenders** tab to open the **All projects** page.
2) On the **All projects** page, select a project.
3) On the **RFIs** tab, select an RFI to review it.

   This tab shows RFIs that have been submitted for all tender packages in this project.
4) To respond to an RFI, select **Click here to reply**.
5) Enter your response and attach any files related to the RFI.
6) Select **Send**.

Email History

View a list of all of the selected project's emails sent to tenderers with basic information about the date each email was sent and the delivery status.

Review Project Emails

Throughout the life cycle of a project, many different types of emails are sent to tenderers by general contractors. The **Email History** tab enables general contractors to quickly view a consolidated list of all emails related to a specific project and to sort them by preference.

To view a history of all emails related to a project:

1) Navigate to the **All Projects** page and select a project from the list of projects.
2) On the **Project Details** page, select the **Email History** tab. Emails display in descending order from the most recent to the oldest, by default. You can also organize them by applying one of the following filter types:
   - **Category**: The type of email sent to a subcontractor. This could be invitations to tender, RFIs, notifications about addenda, or direct messages from the general contractor.
   - **Tender Package**: The name of the tender package related to the email.
   - **Organization**: The bidding organization.
   - **Delivery Status**: The status badge that indicates that the email was sent, delivered successfully, or not delivered.
3) Select an email to view additional details based on email type. The detailed view includes basic information shown in the list view in addition to more specific information. You will be able to view the email title and subject, the sender,and any other recipients from the organization. Navigate to the organization's profile or use a direct link to review the reason for your email, whether it is an invitation to bid, addenda, an RFI, or messages.
4) Select **View Email** to review the original email you sent. (Optional) Select **Resend Email** to send it again.

> **Note**: The **Resend Email** option does not apply for RFIs. To send another RFI, return to the **RFI** tab.

Directory

The Directory page is where general contractors and subcontractors with **Premium** access can maintain and view a consolidated list of connections and requests.

General Contractors

The Directory is where you can maintain a list of your preferred subcontractors in your network. It can include both prospective contractors and those you have worked with in the past. You can organize companies in the network with custom tags and add notes to maintain detailed information about each organization. You can search for and add organizations to your network to build connections and track registration or invitation status. An organization must be added or imported into your network for it to appear in your directory.

The Directory provides a quick visual indicator about the delivery status for email invitations in the **My Network** tab. Contacts in your list who have not received your invitation email display an indicator warning in the Contact column. On the **View details** page, on the **Contacts** tab, you can see the email addresses for specific users who did not receive your email. You can also apply a filter to see only the contacts who didn't receive your emails. Edit the contact email addresses, invite the users again, or delete the contacts.

The Directory also provides quick access to review Received Requests and an option to send requests.

- ***Add an Organization*** (on page 61)
- ***Add Contacts to an Organization*** (on page 62)
- ***Import Subcontractor Organizations*** (on page 64)
- ***Invite Subcontractor Organizations to Register with Preconstruction*** (on page 65)
- ***Add Tags to Organize Companies*** (on page 66)
- ***Add Notes to Keep Detailed Organization Information*** (on page 67)
- ***Edit Details for an Unregistered Organization*** (on page 62)
- ***Delete a Contact from an Unregistered Organization*** (on page 63)

Subcontractors

Premium Feature

If you have premium access, you can use the Directory to maintain a list of general contractors with whom you are connected. The Directory also enables you to send connection requests to general contractors, making your organization easier for them to find in the future.

> **Note**: You can sort organizations from the Directory page by Status, Organization Name, Location, or Performance Rating.

- ***Send a Connection Request to a General Contractor*** (on page 67)

Add an Organization

Add a subcontractor organization to your network to make it easier to find and add to future tender packages.

To add an organization:

1) On the **Directory** page, on the **My network** tab, select + **Add**.
2) On the **Add organization to your network page**, select one of these options:
   - **Existing organization in Preconstruction**: Choose this option if the organization you want to add already has a Preconstruction account. If you know a contact name or organization, you can search within your Network list by contact or organization name. You can modify the location proximity to widen or narrow the search for tenderers by selecting Any location, Project location, Offices, or a Custom location of your choosing.
   - **New organization**: Choose this option if you know that the organization you want to add does not already have a Preconstruction account.

What if I don't know whether the organization already has a Preconstruction account? Both options provide a way to handle this. When you choose **Existing organization**, you will have a chance to search for available organizations. You can apply a filter within your Network list or search by contact or organization name. If you can't find it, then the organization probably isn't in your network, and you can add it. If you choose **New**, Preconstruction will check the directory for duplicates based on the information you provide and give you a chance to add any likely match. Either way, you are unlikely to create obvious duplicates without warning.

3) If you chose **Existing organization** —

   Enter your search criteria and select **Search**. Choose the organization that you want to add, and then select **Add**.

   If you chose **New organization** —

   In the **Invite new organization** and **Additional information** sections, enter the information about the new organization, and then select **Add**.

4) Select **Add**.

Tip

- You can view all organizations regardless of private or public status, or you can narrow your results by status by using **Filters** in the right of the search bar, then selecting Private or Public. Private organizations can still receive messages and invitations to tender, but they cannot participate in opportunities until becoming public.

Add Contacts to an Organization

You can add contacts directly to an organization that has not yet registered with Preconstruction. You can only add contacts to a subcontractor organization if it has a Status of Invited or Not Invited. After a subcontractor has registered, only users in the subcontractor organization can manage contacts.

To add a contact to an unregistered organization:

1) On the **Directory** page, on the **My network** tab, select an organization.
2) On the **View details** page, on the **Contacts** tab, select + **Add**.
3) On the **Add users** panel, enter information about the contact and select **Add**.

Tips

- An email address for a user who did not receive your email displays a warning indicator beside their email address. Edit the email address, invite the user again, or delete the contact.

Edit Details for an Unregistered Organization

Details for a subcontractor organization, including the organization contact, which has been added to Preconstruction by your organization can be edited before the subcontractor organization registers.

> **Note**: These organizations are indicated by an **Invited** or **Not Invited** status on the **My network** tab.

This is especially useful if the email address for the contact is incorrect or has changed.

To edit organization details:

1) On the **Directory** page, on the **My network** tab, select the organization name.
   a. On the **View details** page, on the **Overview** tab, select **Edit**.

      You can update all the fields that are editable. There are a few fields that only a subcontractor organization can complete.

   b. Select **Save**.

To edit the organization contact details:

1) On the **Directory** page, on the **My network** tab, select the organization name. If you would rather find information about a contact or organization, you can apply a filter within your Network list, or find them by searching contact or organization name within the search bar.
2) On the **View details** page, on the **Contacts** tab, on the contact row, select **...** **Actions**, and then select **Edit**.
3) In the **Edit contact** panel, make the appropriate updates, and then select **Save**.

   If the email address is updated for the contact, and the contact has previously been invited to submit a proposal, the general contractor who published the tender package will be notified of this update by email and in the application and presented with the option to resend the tender package using the new email address.

Delete a Contact from an Unregistered Organization

Contact lists can become out-of-date, and as an organization administrator, you may find it useful to completely remove users from an unregistered organization in your directory, rather than just editing the contact's details. Organization administrators can delete users, who may have, for example, retired from or left an organization since being invited to register with, or imported into Oracle Preconstruction.

To delete a contact from an unregistered organization in your directory:

1) On the **Directory** page, on the **My network** tab, select the organization name. If you would rather find information about a contact or organization, you can apply a filter within your Network list, or find them by searching contact or organization name within the search bar.
2) On the **View details** page, on the **Contacts** tab, on the contact row, select **...** **Actions**, and then select **Delete**.
3) In the **Delete contact** panel, review any project associations for the contact, then select a reason for deletion. Options include: **No longer with the organization**, **No longer manages the preconstruction process**, **Incorrect entry**, or **Other**.
4) Select **Delete** to confirm, or select **Cancel** to close the **Delete contact** panel without deleting the contact. Deletion will remove the contact from all tender packages, projects, and tender contact lists.

   If the contact has previously been invited to submit a proposal, the general contractor who published the tender package will be notified of this update by email and in the application.

Note: This process only applies to contacts from unregistered organizations. Contact information for a registered subcontractor can only be managed by their organization.

Import Subcontractor Organizations

Welcome new customers! If you've been using another solution to manage your subcontractor information, you can import it to Oracle Preconstruction.

To help you successfully import your subcontractor contacts and invite them to use Oracle Preconstruction, please review these topics.

Note: You may not see all of the import options described here. Which options are available depends on whether your organization is based in Australia or New Zealand or the US or Canada.

- ***Microsoft Excel*** (on page 64)

Tip

- An email address for a user who did not receive your email displays a warning indicator beside their email address on the **View details** page, on the **Contacts** tab. Edit the email address, invite the user again, or delete the contact.

Microsoft Excel

You can import subcontractor information to Preconstruction using a Microsoft Excel spreadsheet. In the application, you can download a blank version of this spreadsheet, which includes columns for all of the information that you can import for each subcontractor contact.

If you import a subcontractor who already has an Oracle Construction and Engineering account for Lobby (based on organization name, country, and postal code), the details in their Oracle Construction and Engineering account will be added to their Preconstruction profile.

In order to import a subcontractor contact, you must have the following information, which corresponds to required fields in the spreadsheet:

- Contact First Name
- Contact Last Name
- Contact Email
- Organization Name
- City
- State
- Postal Code Country

To import subcontractor contacts using an Excel spreadsheet:

In Preconstruction...

1) On the **Directory** page, on the **My network** tab, select **Import**.

2) On the **Import subcontractors** dialog, in the **Select source** section, select **Import using Excel**.
3) Select **Download excel (.xls) template**.
4) Save the template file to your computer and open it.

In the Excel Template...

1) On the **SubcontractorsList** sheet, enter information for each subcontractor contact that you want to import in its own row.

   Important: If you are importing multiple contacts from one organization, make sure these fields are identical for each contact in that organization:

   - Organization Name
   - Address1
   - Address2
   - City
   - State
   - Postal Code
   - Country
   - Phone
   - Fax

   If this information is not identical, you will create multiple records that refer to the same thing.

   The **Instructions** sheet includes more tips and instructions for quick reference.
2) When you have added information for all of the subcontractor contacts that you want to import, save the spreadsheet.

Back in Preconstruction...

1) If you've navigated away from the **Import subcontractors** dialog, on the **Directory** page, on the **My network** tab, select **Import**.
2) On the **Import subcontractors** dialog, in the **Select source** section, make sure **Import using Excel** is selected.
3) In the **Drag and Drop** box, drag the populated Excel spreadsheet that you saved a moment ago.

   Alternatively, you can simply select the **Drag and Drop** box and browse for the populated Excel spreadsheet.
4) Select **Import**.

Invite Subcontractor Organizations to Register with Preconstruction

After you have added or imported subcontractor organizations to Preconstruction, you should invite them to register with Preconstruction and set up their own accounts.

When you invite an organization to set up their Preconstruction account, the users in that organization receive an invitation email. New users will be able to see the contact name and email for your organization in their invitation email, so be sure to keep that information up-to-date.

You can invite all subcontractors who have not yet been invited to register at once, or you can individually choose which subcontractor companies you want to invite. You can reorder or select all organizations in the default network list to quickly find specific organizations filtering by Status, Organization Name, Location, or Performance Rating.

To invite all subcontractors who have not yet been invited to register at once:

1) On the **Directory** page, on the **My network** tab, select **Invite imported users**.

   This button only appears if there is at least one subcontractor organization with a **Status** value of **Not invited**.

2) In the **Invite users to register** dialog box, select **Cancel**, **Add Custom Message**, or **Invite**.

   If you select A**dd a Custom Message**, a panel expands for you to type the message. Select **Preview Invitation** or **Send Invitations** to finalize, or select **Cancel** to return to the previous screen. This allows you to personalize your message for users who may not yet be familiar with Preconstruction.

To invite users from individual organizations to register:

1) On the **Directory** page, select the check boxes in the rows for each company whose users you want to send invitations to register.

   To have the network list only show organizations that have not yet been invited to register, select **Filters**, and then set the **Status** field to **Not invited**.

2) On the **Actions** menu, select **Invite to register**.

If you're trying to find information about, or check the status of a specific subcontractor, you can use the search bar to search for the contact or organization name.

Add Tags to Organize Companies

In the Directory, you can add custom tags to organization profiles. This makes each organization record more descriptive and easier to find.

If you add tags to organization profiles, you can filter your directory by tag names in the **Filters** list. A complete list of tags displays for you to choose from when you select the **Tags** field.

To add a tag to an organization profile:

1) On the **Directory** page, on the **My network** tab, find the organization to which you want to add a tag.

2) In that organization row, select **Tags** (if the organization already has tags) or + **Add** (if it does not).

   To add the same tag to multiple organizations simultaneously, select each organization row, and then select the **Actions** menu and select **Add tags**.

3) If the organization doesn't already have tags, enter the tags you want to add, and then select **Save**.

   If the organization does already have tags, select **Edit**, then enter the new tags, and select **Save**.

Add Notes to Keep Detailed Organization Information

The Directory enables you to keep notes on companies.

Notes are private to your organization and cannot be viewed by subcontractors.

To add a note to an organization profile:

1) On the **Directory** page, on the **My network** tab, find the organization to which you want to add a note.
2) In that organization row, select **Notes** (if the organization already has notes) or + **Add** (if it does not).
3) In the **Notes** dialog box, if the organization already has notes, select **Edit**. If the organization does not already have any notes, simply start typing in the text area.
4) Select **Save**.

Send a Connection Request to a General Contractor

Working with a general contractor isn't the only way you can establish a relationship with them in the application. You can also send requests to connect. If a general contractor accepts your request, you will be added to their network and your organization will be easier for them to find and remember for future contracts.

> **Note:** If you haven't connected with any organizations or general contractors, nothing will display in your Directory.

To send a connection request to a general contractor:

1) On the **Directory** page, on the **Send requests** tab, select **Connect**.

   This will open the search settings that you will use to find a general contractor.
2) In the **Organization Name** field, enter all or part of a name of a general contractor organization.
3) In the **Location** field, select the location by which you want to filter the **Location Proximity** setting.

   This can be Any location, Project location, Offices, or a Custom location of your choosing. The distance format defaults to your local data center standards: miles (US/Canada) or kilometers (AU).
4) Use the **Location Proximity** setting to specify the maximum distance from the specified **Location** for search results.
5) Select **Search**.
6) In the search results, select the check boxes for the companies to which you want to send connection requests and then select **Send requests**.

View Bidding History and Tender Rate

As a general contractor, you can view a subcontractor's bidding history and tender rate from an organization's profile page. Reviewing this information can help provide an overview of your relationship with a subcontractor.

Bidding History provides the total number of invitations that you have sent to that organization and their tender rate. This information also displays in a pie chart that is broken into categories: Submitted, Awarded, Accepted, No Response, Undecided, and Declined.

To view an organization's bidding history and tender rate:

1) From the **My Network** tab in your **Directory**, select an organization and navigate to the **Overview** page.
2) Review the organization's bidding history and bid rate. You can view history over different time periods: six months, twelve months, and since registration.

Product Accessibility

This topic includes guidelines and tips regarding accessible product usage.

Oracle has also published an Accessibility Conformance Report (ACR) for the Preconstruction product. The latest version of the Preconstruction Accessibility Conformance Report can be accessed from Oracle's Accessibility Program Website at this link: ***https://www.oracle.com/corporate/accessibility/vpats.html#acrs-tab*** (***https://www.oracle.com/corporate/accessibility/vpats.html#acrs-tab***).

Assistive Technology

Users can use assistive technology, such as screen readers, with Preconstruction.

Keyboard Shortcuts

The list of keyboard shortcuts for Preconstruction, including page-specific and browser-specific keyboard shortcuts, can be accessed here: ***Keyboard Shortcuts*** (on page 68)

Keyboard Shortcuts

You can use your keyboard to navigate throughout Preconstruction and work with important controls. In general, you can use the Tab key to cycle through elements within the application, and press Enter or Space to access them.

Page Header Navigation

- Press **Tab** to navigate the parts of the page header. In the part that lists the main pages (Tenders, My opportunities, Open opportunities, Reports, Directory), press the **Left Arrow** and **Right Arrow** to navigate the page links. Similarly, in the section that includes the user menu, the notification link, and the help link, press the **Left Arrow** and **Right Arrow** to navigate among these links.

- Press **Enter** to navigate to the highlighted page or open the highlighted menu (such as **More** or the user menu).
- In menus (**More** or the user menu), press the **Up Arrow** and **Down Arrow** to navigate among the choices and **Enter** to select them.

List Views

List views include lists of objects, like the projects on the **All projects** page.

- Press **F2** with a list highlighted to enter edit mode.
- Press **Esc** to exit edit mode.
- Press **Tab** to navigate to the next focusable element. Press **Shift + Tab** to the previous focusable element.

Tables

Tables are similar to list views but typically show more specific objects, like files on the **Files** tab of the **View details** page.

- Press **Tab** to move the focus to the first row of the table.
- Press the **Down Arrow** or **Up Arrow** to navigate rows.
- Press **Home** to highlight to the first row. Press **End** to highlight the last row.
- Press **F2** with a row highlighted to enter edit mode. In edit mode, press **F2** again to enter read mode.
- Press **Tab** to navigate among focusable elements in a row.
- Press **Space** to select a row.

Detail Windows

Detail windows contain details about a selected element.

- Press **F6** to move focus on the detail window.
- Press **Esc** to close the detail window.
- Press **Tab** or **Shift+Tab** to navigate among the focusable elements inside the detail window.

Date Pickers

- Press the **Up Arrow** or **Down Arrow** to show the calendar.
- Press **Home** to highlight the first date of the month. Press **End** to highlight the last date of the month.
- Press **Page Up** to move to the next month. Press **Page Down** to move to the previous month.
- Press **Alt + Page Up** to move to the next year. Press **Alt + Page Down** to move to the previous year.

Tab Bars

A tab bar is a group of tabs on a single page, as on the **View details** page, where tabs include **Project details** and **Tender packages**.

- Press **Enter** or **Space** to select a highlighted tab.
- Press the **Left Arrow** or **Right Arrow** to navigate horizontally among tabs.

- Press the **Up Arrow** or **Down Arrow** to navigate vertically among tabs.
- Press **Home** to highlight the first tab. Press **End** to highlight the last tab.

Trade Code Components

- On the Settings page, with one of the trade code sets selected, press **Left Arrow** and **Right Arrow** to change the set selected. Press **Enter** to select the highlighted set.
- In tables that list trade codes, press the **Down Arrow** and **Up Arrow** to navigate among the trade code rows.
- To expand a highlighted CSI code to show its subordinate trade codes, press **Enter** to select the row, press **Tab** to highlight the expand arrow, and then press **Enter** again to expand the row.

Action Menus

Action menus expand to show various actions when you select them. They include the user menu and the smaller menus that are indicated by the ••• **Actions** icon.

- Press **Enter** with an action menu highlighted to open it.
- Press the **Up Arrow** or **Down Arrow** to navigate among the menu choices.

Sliders

- Press **Tab** to focus on the slider component.
- With the slider highlighted, press the **Left Arrow** or **Right Arrow** to move the slider and update the values.

Managing Personal Information in Preconstruction

About Consent Notices

Consent notices inform users how personal information (PI) is collected, processed, stored, and transmitted, along with details related to applicable regulations and policies. Consent notices also alert users that the action they are taking may risk exposing PI. Preconstruction helps you to ensure that you have requested the appropriate consent to collect, process, store, and transmit the PI your organization holds as part of Preconstruction data.

Consent notices should—

- be written in clear language that is easy to understand.
- provide the right level of detail.
- identify the purpose and legal basis for your collection, processing, storage, and transmission of PI.
- identify whether data will be transferred to named third parties.

- identify PI categories and list the data which will be collected, processed, stored, and transmitted.

About Personal Information

Personal information (PI) is any piece of data which can be used on its own or with other information to identify, contact, or locate an individual or identify an individual in context. This information is not limited to a person's name, address, and contact details. For example, a person's IP address, phone IMEI number, gender, and location at a particular time could all be personal information. Depending on local data protection laws, organizations may be responsible for ensuring the privacy of PI wherever it is stored, including in backups, locally stored downloads, and data stored in development environments.

> **Caution**: Personal information (PI) may be at risk of exposure. Depending on local data protection laws, organizations may be responsible for mitigating any risk of exposure.

Cookies Policy in Preconstruction

Oracle might use cookies for authentication, session management, remembering application behavior preferences and performance characteristics, and to provide documentation support.

Also, Oracle might use cookies to remember your log-in details, collect statistics to optimize site functionality, and deliver marketing based on your interests.

For more information on Oracle's data collection processes and privacy commitments, see:

- Oracle Cloud Services Agreement

  http://www.oracle.com/us/corporate/contracts/saas-online-csa-us-1894130.pdf
- Oracle Privacy Policy

  https://www.oracle.com/legal/privacy/services-privacy-policy.html
- Oracle Data Processing Agreement

  https://www.oracle.com/corporate/contracts/cloud-services/

Your Responsibilities

Information security and privacy laws can carry heavy penalties and fines for organizations that do not adequately protect PI they gather and store. If these laws apply to your organization, it is your responsibility to configure consent notices before they are required. You should work with your data security and legal teams to determine the wording of the consent notices you will configure in Preconstruction.

If a consent notice is declined, it is your responsibility to take any necessary action. For example, you may be required to ensure that the data is not stored or shared.

Privacy

On the **Privacy** page, you can change two settings related to the privacy of your personal and organization profiles:

- **Personally identifiable information (PII)** (for general contractors): If you select **Yes, I agree** for this setting, all users will receive a personally identifiable information (PII) notice. They will have to agree to the terms of the notice to use the application.
- **Organization profile privacy**: This setting determines whether your organization is visible to Preconstruction users from other organizations.
  - General Contractors: You must select **Yes, I agree** in order to create projects.
  - Subcontractors: You must select **Yes, I agree** to make your organization discoverable by general contractors in the application.

Personal Information (PI) Data in Preconstruction

Personal information (PI) may be visible in multiple areas of Oracle Preconstruction, including but not limited to general contractor and subcontractor profiles user and organization profiles, project profiles, and user profiles.

PI may be at risk of exposure in multiple areas of Preconstruction, including but not limited to general contractor and subcontractor profiles user and organization profiles, project profiles, and user profiles.

As part of Preconstruction Cloud Services, you may be using Oracle Identity Cloud Service ("Oracle IDCS") to manage your user access and entitlements across a number of cloud and on-premises applications and services. If you are using or accessing Oracle IDCS, you are responsible for deleting your details and data from the Oracle IDCS environment. You are responsible for retrieving your content in Oracle IDCS during your applicable services period.

Configure Consent Notices for Oracle Preconstruction

If you have administrator privileges, you can determine whether all users have to accept a personal information (PI) consent notices to use the application. You can also create a custom consent notice message.

To configure notices:

1) In the user menu, select **Privacy**.
2) On the **Privacy** page, select **Edit**.
3) In the **Personally identifiable information (PII)** section, select **Yes, I agree** if you want all users to receive a personally identifiable information (PII) notice. They will also be required to agree to the terms of the notice to use the application.

   Alternatively, select **No, I don't agree** if you do not want users to receive the consent notice or require them to agree to it to use the application.
4) If you selected **Yes** in the previous step, in the Consent notice message text area, enter the message that you want users to receive along with their consent notice.

   Consent notice messages usually include a brief description of the kind of information that is collected and how it is used.

5) Select **Save**.

Change Your Organization Profile Privacy Setting

Your organization profile needs to be public for you to create projects, tender on opportunities, and access project directories. Public organizations and users are discoverable in Preconstruction directory and can view opportunities. General contractors can send invitations to tender to both public and private organizations present in their own directory.

You can, however, choose whether your organization profile is public.

To change your organization profile privacy settings:

1) On the user menu, select **Privacy**.
2) On the **Privacy** page, select **Edit**.
3) In the **Organization profile privacy** section, if you want to list your organization profile as public, select **Yes, I agree**. Otherwise, select **No, I don't agree**.