Oracle
Preconstruction
Subcontractor User Guide

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ORACLE

Oracle Preconstruction Subcontractor User Guide

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Contents

About This Guide

This guide explains how to use Oracle Preconstruction as a subcontractor who receives and responds to requests for tenders.

Subcontractors who are responsible for managing relationships with general contractors, receiving requests for tenders, submitting RFIs, and performing the work commissioned by general contractors 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 (on page 6). Subcontractors with **Premium** access have additional capabilities.

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

Premium Features for Subcontractors

Subcontractors who want to get the most out of Preconstruction can take advantage of these features by upgrading to a premium version of the application. (These features are also available to all general contractors.)

- View project award status in the My Opportunities and Open Opportunities lists.
- View your organization's tender history with any general contractor for which you have used Preconstruction to place tenders.
- Search for general contractors and send requests to connect to them through Preconstruction.
- Add more details in your organization profile to make sure general contractors have the best and most up-to-date information about you and your organization.

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 19).

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).

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.

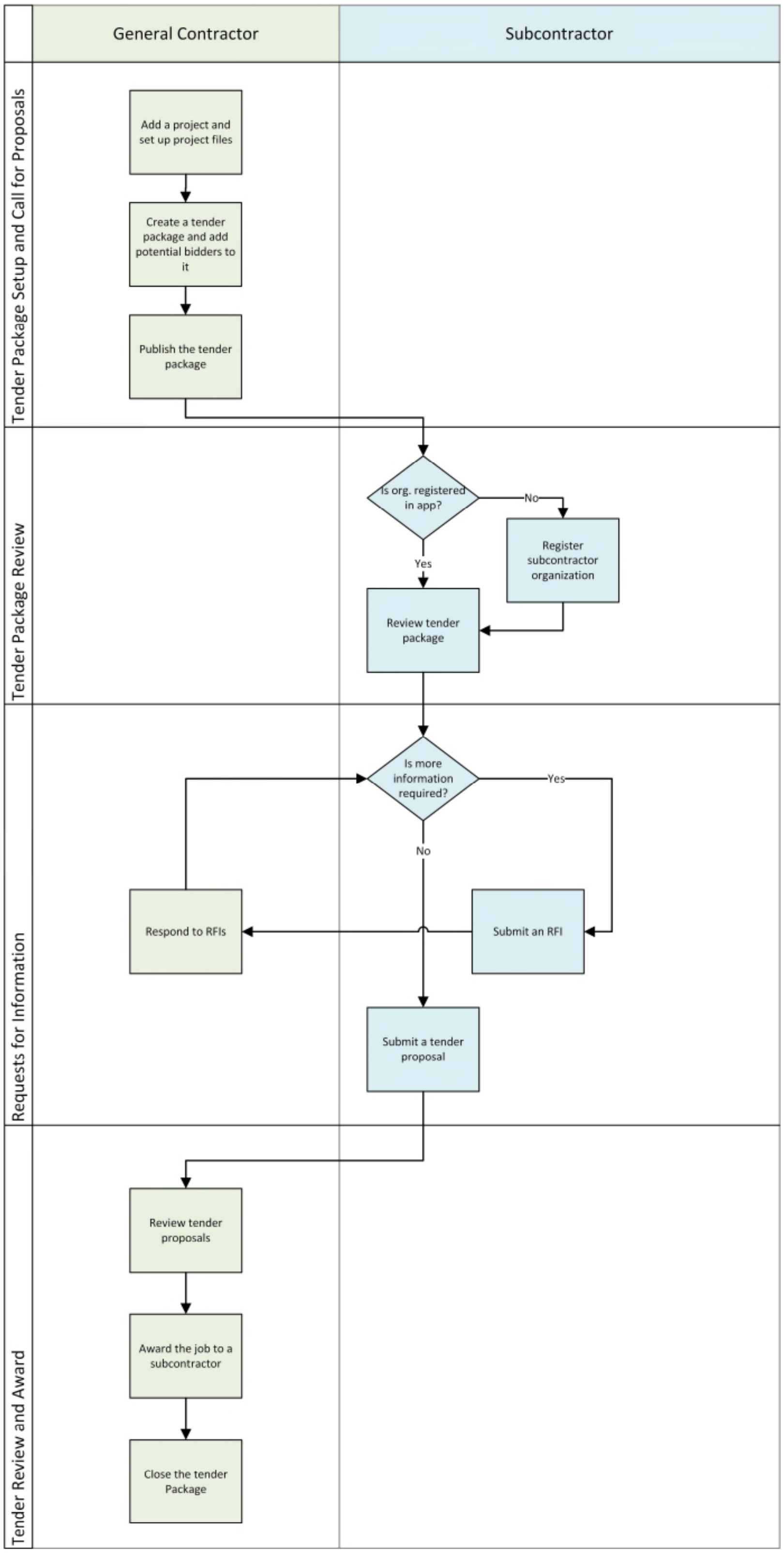
Non-administrators can—

- **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*** (on page 6).

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
No
Respond to RFIs
Submit an RFI
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.

Getting Started for Subcontractors - Administrators

If you're a subcontractor, use Oracle Preconstruction to receive invitations to tender and maintain records and correspondence with general contractors. When you receive an invitation to tender, you will be able to view the contact information for the organization inviting you to bid.

As an administrator for your own 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 6).

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 (Video): Australia/New Zealand | US/Canada

To get started as a subcontractor 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 8)

Learn more about the tasks specifically available to you:

- Get started as a subcontractor (Video): Australia/New Zealand | US/Canada

2) Configure your organization profile.

   Check your organization profile and update it as needed.

   - ***My organization*** (on page 18)

   Learn about managing privacy settings and configure as needed.

   - ***Your Responsibilities*** (on page 41)

3) 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 19)

Register Your Organization and Profile

In order to respond to an invitation to tender with Oracle Preconstruction, you must register your organization and personal profile. This helps the general contractor keep track of your contact information, making it easy for them to send future invitations.

To register your organization and account:

1) On the **Register your Organization** page, in the **Organization Details** area, provide information about your organization.

   In the **Corporate Office Address** area, enter the address and contract information for your organization's headquarters or main office. The distance format defaults to your local data center standards: miles (US/Canada) or kilometers (AU).

2) In the **Profile Information** area, enter information for your profile. You will use the email address provided here to log on. This email address will also display on invitations sent to tender and other communications from your organization.
3) Select **Register**.

   You should receive two email messages. One is a welcome message, and the other includes a link to activate your account.

4) Open your email account and find the account activation message.
5) In the account activation message, select **Activate Your Account**.
6) On the password page, enter your new password and activate your account.

Welcome Emails and What You Do with Them - Subcontractors

After your subcontractor account has been activated, you receive two 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 Subcontractors

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

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To get started as a subcontractor:

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 8)

   Learn more about the tasks specifically available to you:

   - Get started as a subcontractor (Video): Australia/New Zealand | US/Canada
2) If you have **Premium** access to Preconstruction, review opportunities in your area on the ***Open Opportunities*** (on page 22) page.
3) Explore the ***My Opportunities*** (on page 24) page, which is where you will spend most of your time reviewing opportunities, submitting tenders, and corresponding with general contractors.
4) Review your profile on the ***My Profile*** (on page 15) 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 16).

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.

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**.

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 6).

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 17).

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.

Opportunity

When you open an opportunity, the opportunity page shows information about it. Here you can review the opportunity, accept it, or ask the general contractor for more information.

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 **Addenda** 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.
- 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 29).

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 19).

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 6).

- **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.

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 31)
- ***Add Contacts to an Organization*** (on page 32)
- ***Import Subcontractor Organizations*** (on page 34)
- ***Invite Subcontractor Organizations to Register with Preconstruction*** (on page 35)
- ***Add Tags to Organize Companies*** (on page 36)
- ***Add Notes to Keep Detailed Organization Information*** (on page 37)
- ***Edit Details for an Unregistered Organization*** (on page 32)
- ***Delete a Contact from an Unregistered Organization*** (on page 33)

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 37)

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 34)

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**.

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 38)

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**.