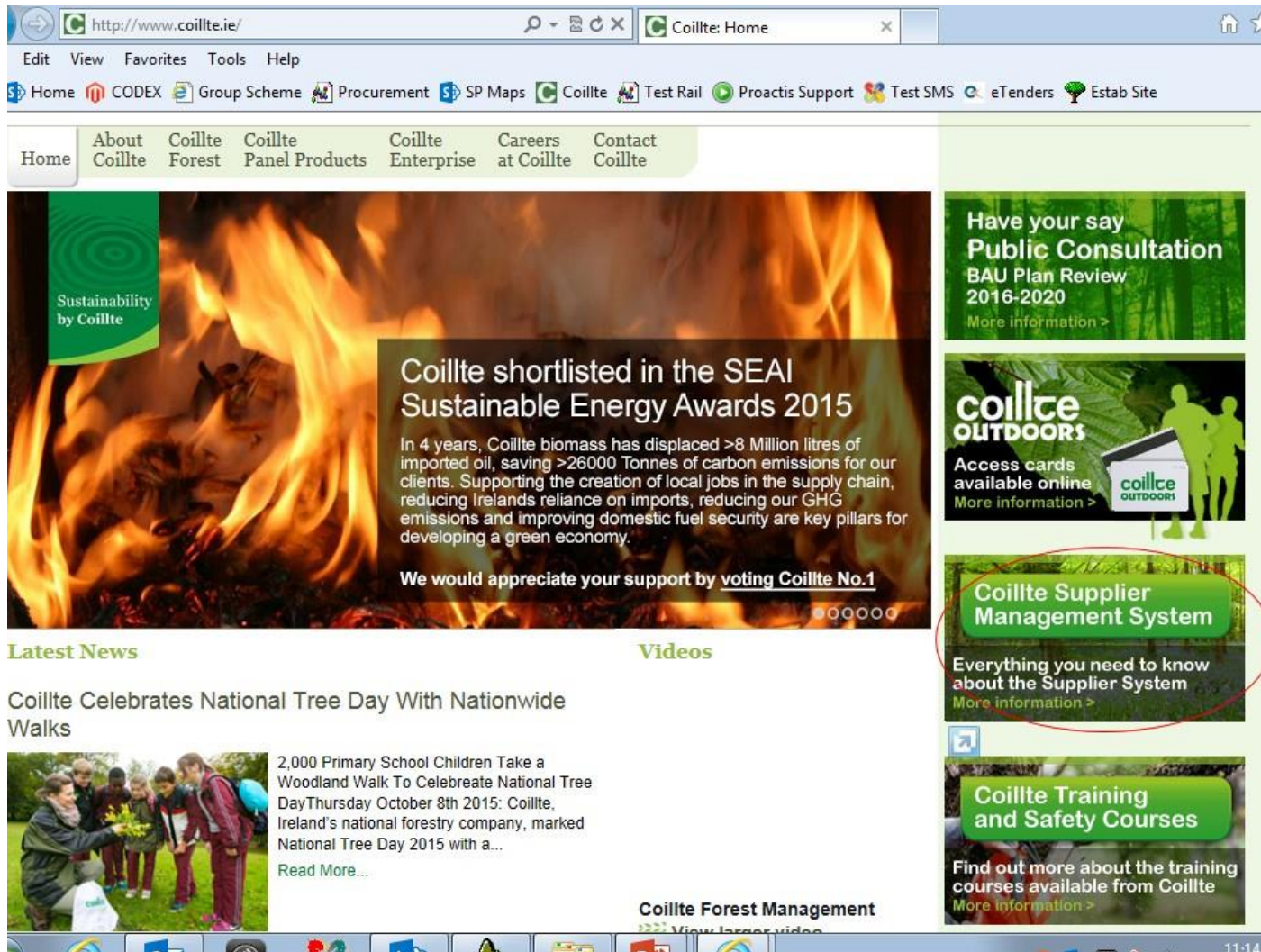




Haulage Services

How to complete and Submit a
Pre-Qualification Questionnaire
via the Proactis Web Portal.

- This presentation will provide guidance on how to complete and submit a Pre-Qualification Questionnaire on Coillte's Supplier Management System, the Proactis Web Portal.
- Only PQQ's submitted via the Proactis Web Portal will be considered for Haulage Services.
- If you pass the PQQ stage you will be invited to tender at a later date and at this point you will be asked to submit this tender via the Proactis Web Portal also.



- Coillte’s Supplier Management System can be accessed via the Coillte Website.
- When you enter Coillte’s website, click on the Coillte Supplier Management System button on the right of the home page, circled in red on this presentation.

The screenshot shows the Coillte website's Supplier Management System (SMS) page. The navigation menu includes: Home, About Coillte, Coillte Forest, Coillte Panel Products, Coillte Enterprise, Careers at Coillte, and Contact Coillte. The page title is "Supplier Management System (SMS)". The breadcrumb trail reads: "You are here: About Coillte > Purchasing > Supplier Management System (SMS)".

The main content area features the following sections:

- Supplier Management System (SMS)**: A paragraph describing the system as a paperless, web-based tool for interacting with suppliers and service providers.
- Coillte Supplier Management System**: A section with instructions on how to use the system, including a link to the Supplier Management System Portal: www.proactisplaza.com/SupplierPortal/?CID=coillte. This link is circled in red in the image.
- SMS Support**: A section providing contact information for the Supplier Management System Support team, including their address (Cedar House, Moneen Road, Castlebar, Co. Mayo) and telephone number (+353 1 2011171).

On the right side of the page, there are several promotional banners:

- Have your say Public Consultation BAU Plan Review 2016-2020**: A banner with a "More information >" link.
- coillte OUTDOORS**: A banner advertising "Access cards available online" with a "More information >" link.
- Coillte Supplier Management System**: A banner stating "Everything you need to know about the Supplier System" with a "More information >" link.
- Coillte Training**: A banner at the bottom right.

The footer of the page contains the text: "Innovative & sustainable management of natural resources".

- This will then bring you through to the Supplier Management System or SMS section of the website.
- There are many SMS user guides which you may find useful when navigating the Proactis Web Portal.
- To launch the Proactis Web Portal you will need to click on the web link www.proactisplaza.com, circled in Red in this presentation.

TYPE B: I have not been invited



Copy / type the link into your internet browser

<https://www.proactisplaza.com/SupplierPortal/?CID=coilte>

To enter the PROACTIS Supplier Portal

The screenshot shows the PROACTIS Supplier Portal sign-in page. On the left, there is a 'Sign In' section with fields for 'Organisation ID', 'Login Name', and 'Password', a 'Sign In' button, and a link for 'Forgot your login details?'. Below this is a 'Don't have an account? Sign up' link. On the right, there is a 'View Opportunities' button. At the bottom right, there is a 'Have you been invited?' section with an 'Access Code' field and a 'Go' button. A callout box points to the 'View Opportunities' button with the text 'Feel free to view public opportunities'. Another callout box points to the 'Sign up' link with the text 'Click Sign up'. The background features a blue gradient with several white and colored arrows pointing in various directions. The COILTE logo is in the top left, and the PROACTIS logo is in the bottom right.

- If you are not a registered user of the Proactis Web Portal, the following slides will help to guide you with the registration process.
- The SMS user guides on Coillte's website that I have referred to previously will also provide more detailed guidance.
- To begin the registration process you must first click sign up as identified here.

TYPE B: I have not been invited



Complete Initial Registration Steps

Complete initial registration steps – to allow an activation email to be sent

Enter the requested details

i Initial registration requests that you input some memorable information that will be used if you need to reset your password.

i Fields depicting a '*' are mandatory and must be complete

- Next, you must complete the initial registration steps to allow an activation e-mail to be sent.
- Enter the requested details here and ensure that all mandatory fields marked by a red star are completed.
-

TYPE B: I have not been invited

The screenshot shows an email client interface with a message from 'sender@salesvm.com' titled 'Supplier Network Registration Validation'. The email body contains registration details and an activation link. Three callout boxes provide instructions: one points to the email header, another to the registration details, and a third to the activation link.

Once activation is confirmed on screen an email is received

The email contains your new organisational details and a temporary password. Please keep this email until you have successfully registered

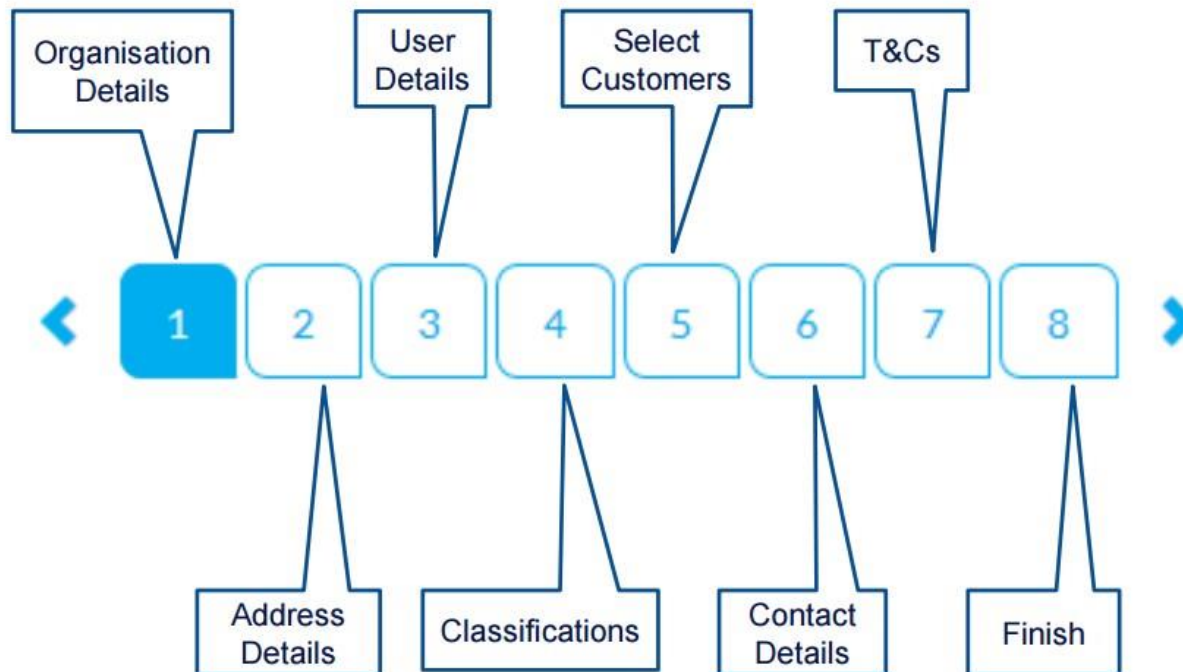
Click the link to activate your account

- Once activation is confirmed on screen, an e-mail is received.
- The e-mail you receive will contain your new organisational details and a temporary password.
- Please ensure that you keep this e-mail until you have successfully completed the registration process.
- Your Proactis account will be activated by clicking the link **“Click here to activate your account.”**

TYPE B: I have not been invited





- Self-Registration requires the completion of 8 Simple Steps as detailed here.





Self Registration requires the completion of 8 simple steps



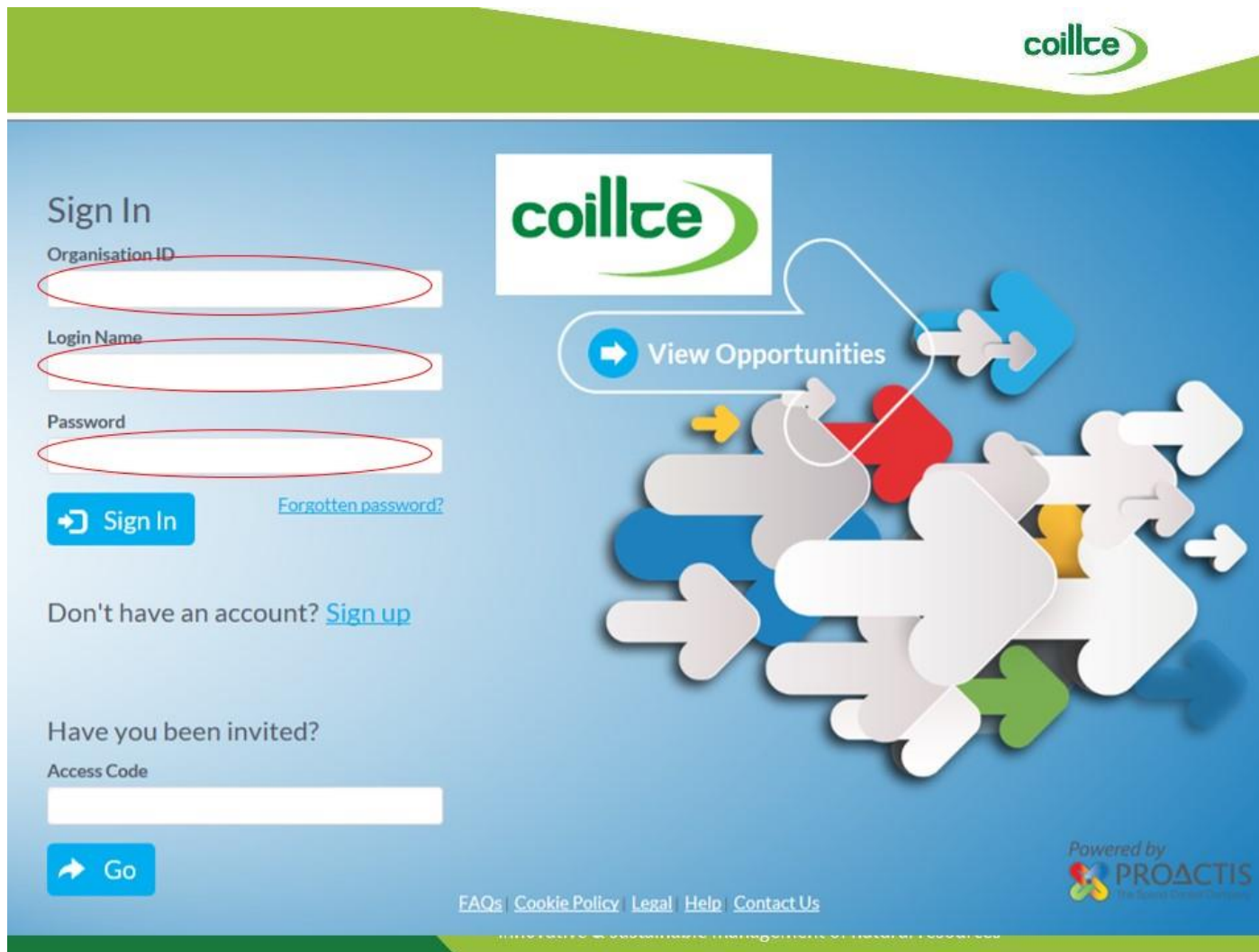


About Coillte	<h3>Supplier Management System (SMS)</h3> <p>Coillte procure using modern technology that allows us to interact online with our suppliers and service providers. This innovative technology is implemented via a Supplier Management System: a paperless, web based and effective tool which aims to increase efficiency and decrease cost for both Coillte and its Business Partners.</p> <h4>Coillte Supplier Management System</h4> <p>Please use the link below to go to the Supplier Management System Portal. On the Portal go to the register now section at the bottom left hand side of the page and complete the steps. Please ensure that you select Coillte to do business with in the second section. All this information is available in the user guides should you require them.</p> <p>www.proactisplaza.com/SupplierPortal?CID=coillte</p> <ul style="list-style-type: none"> ☑ Supplier Management System User Guide ☑ Supplier Guides Registering on the Supplier Network (Self Registration) Registering on the Supplier Network (Invited by Coillte) Password Management Changing my organisation details Registering an interest in a tender Opportunity Locating Amending a response submitted Responding to a tender Opportunity Contract Management Invoicing Purchase to Pay - Terms and Conditions FAQ
News	
Recreation	
Purchasing	
Purchasing Policy	
What we buy	
How we buy	
Supplier Management System (SMS)	
FAQ	
SMS Support	
Contact Us	
Community	
Publications	
Video	
Frequently Asked Questions	
Contact Us	

- On www.coillte.ie
- It is recommended that you check the supplier guide **“Registering on the Supplier Network (Self Registration)”** circled in red on this slide.
- This supplier guide will provide you with detailed guidance on how to complete the 8 Simple Steps of the Registration process.



- Once you have completed the registration process, you can launch the Proactis Web Portal clicking on the web link www.proactisplaza.com on Coillte's website.
- You will then need to enter your login details to access the web portal.

coilte Supplier Network

Help ? Sinead Cronin SC Ltd

Category	Count
Notifications	15
Opportunities	40
Orders	0
Invoices	0
Customer Relationships	0
Customer Requests	0
Auctions	0
Contracts	0

Click into Opportunities

- Click on the opportunities button to view your tendering opportunities.

From here you can review the requests that have been sent to you by customers and create responses.

Coillte Haulage

Search Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
ERFX1000584	Coillte	DPS2	Advertised	21/06/2016 00:00	10 days 8 hours	➔
ERFX1003068	Denbighshire County Council	Test Project for a Super Fast Car	Advertised	27/06/2016 15:00	16 days 23 hours	➔
ERFX1000476	Coillte	DEBBIE - SMS TO FIS CONTRACT TEST	Advertised	15/07/2016 23:59	1 month 5 days	➔
SRQ1000184	Coillte	Haulage Services 2017	Advertised	17/07/2016 23:59	1 month 7 days	➔
eREQ_1000255	Matt Organisation for Release 4.6	Provision of IT Goods and Services	Advertised	29/07/2016 23:59	1 month 19 days	➔
ERFX1000478	Coillte	DEBBIEC - 2ND TEST OF SMS TO FIS CONTRACT CHECK	Advertised	31/07/2016 23:59	1 month 2 days	➔
ERFX1000056	Bedford Borough Council	Test Restricted OJEU 24Sep13	Advertised	30/12/2016 23:59	6 months 20 days	➔
RFX1000207	Ilig Buyer PLC	LD DPS registration notice	Advertised	31/05/2018 23:59	More than a year	➔
EREQ1000179	Torfaen County Borough Council	DPS Test 012	Advertised	31/05/2018 23:59	More than a year	➔
EREQ1000172	Torfaen County Borough Council	DPS Test 008	Advertised	15/02/2019 23:59	More than a year	➔

1 - 10 of 22 items

Click blue "Show me" button

- All opportunities will now be listed as displayed here.
- At the top of the slides you will see a search function for pinpointing your area of interest.
- By entering Haulage in the search function and clicking search, haulage opportunities will be highlighted.
- In this example you will click on the **Blue Show Me button** to take you to the next stage.



- If this opportunity is of interest to you, click on **Register Interest**, circled in red here.

Your Opportunities

From here you can review the requests that have been sent to you by customers and create responses.

Haulage

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
SRQ1000184	Coilte	Haulage Services 2017	Advertised	17/07/2016 23:59	1 month 7 days	

Opportunity | SRQ1000184

Name	Type	Download
Guidance Document for completing PQQ	Generic Documents	
Operator Training	Generic Documents	
Vehicle Sheet	Generic Documents	

Description

blah blah

Contract Start Date

Contract End Date

Delivery Address

Government Buildings
O'Connell's Road
SAND

Purchasing Contact

Sinead Cronin
494380030
sinead.cronin@coilte.ie

Register Interest

Click on "Register Interest" to progress.



Your Response | ERSP1000727

Sinear




-  Decline
-  Messages
-  Validate
-  Save Draft
-  Submit

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

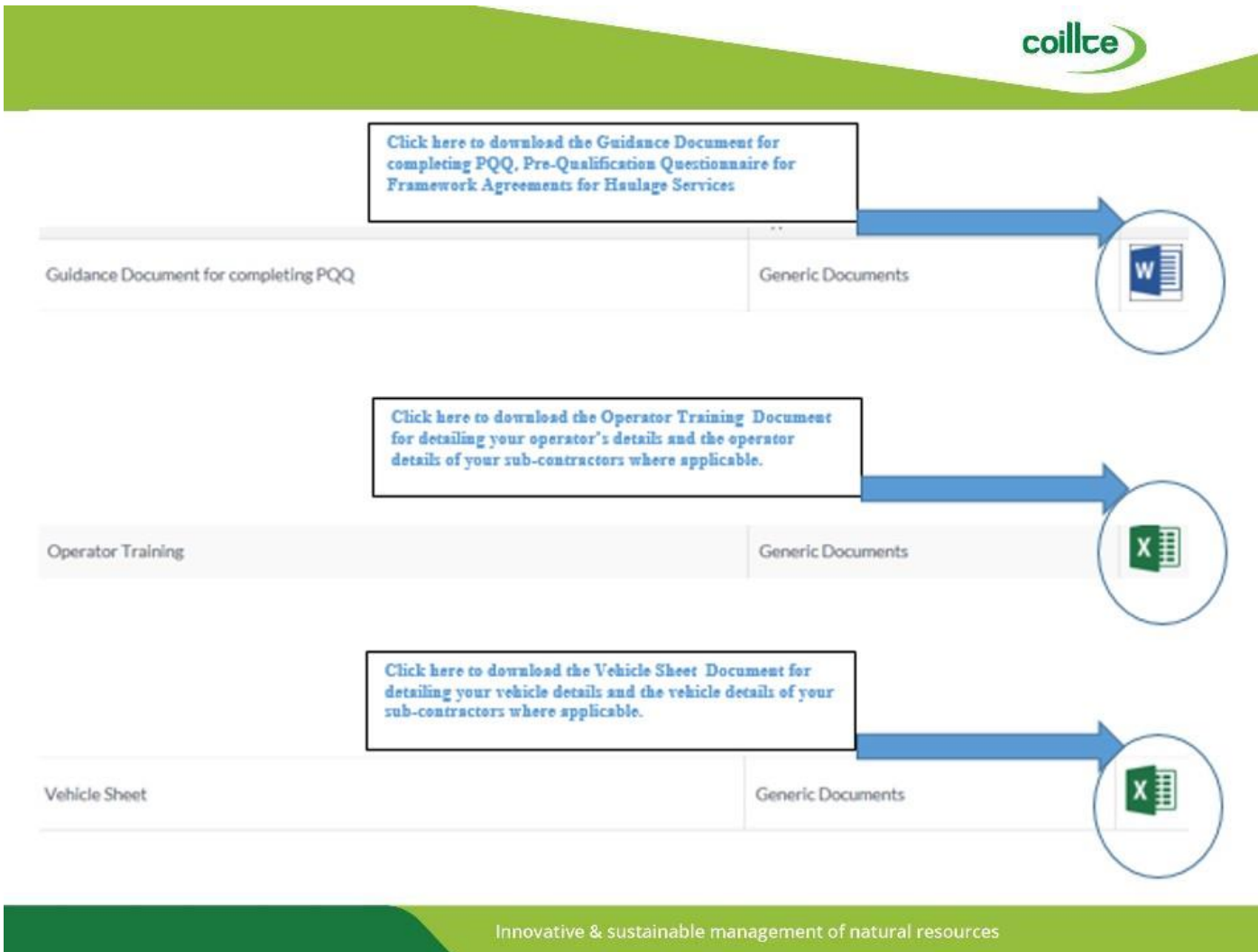
General
Questions
Attachments
➤

Request Documents (3)

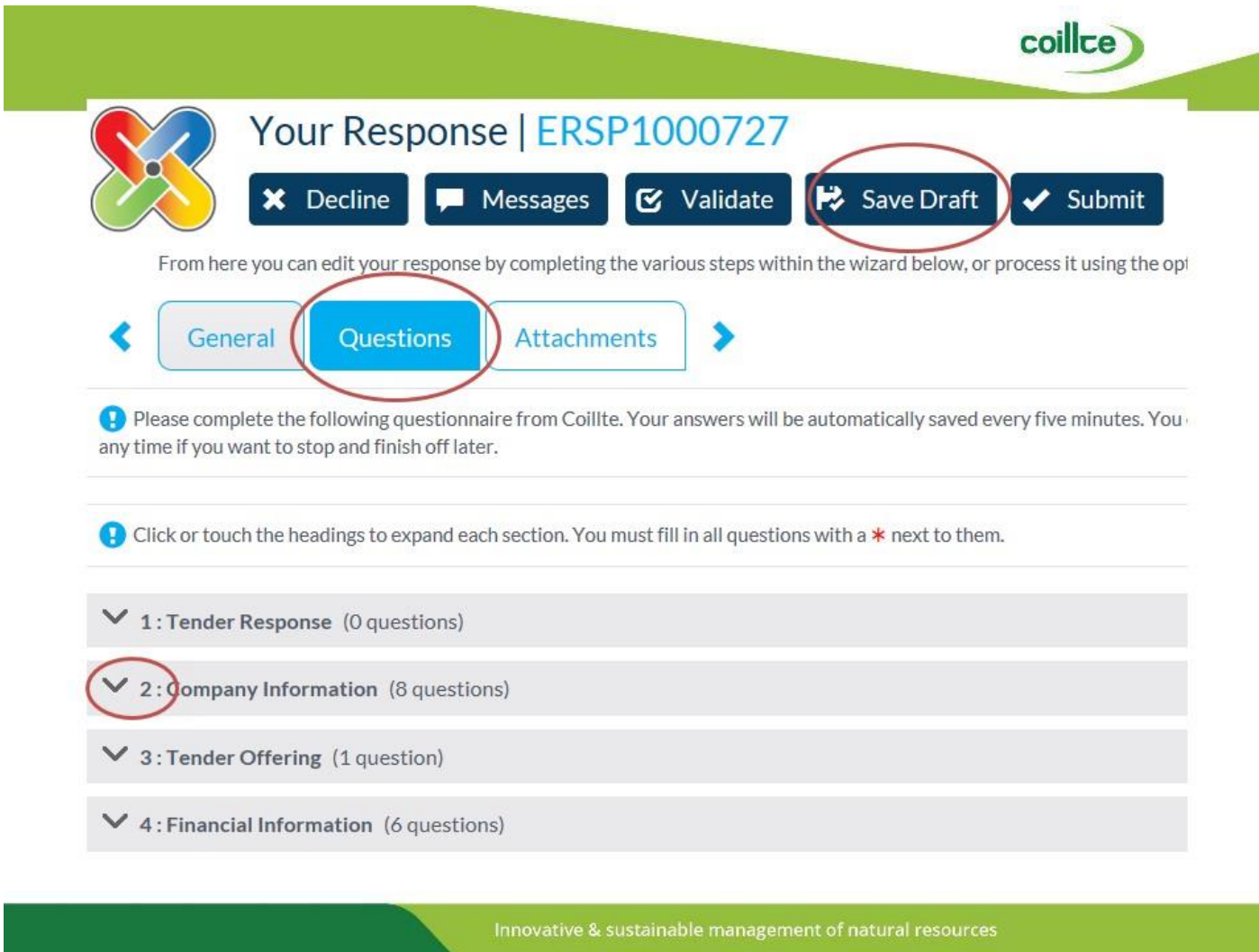
Please ensure you read all documents before responding to opportunity request.

Name	Type	Download
Guidance Document for completing PQQ	Generic Documents	
Operator Training	Generic Documents	
Vehicle Sheet	Generic Documents	

- You will now have entered the section that allows you to progress with providing the necessary details to express an interest in tendering for Haulage Services to Coillte.
- In this example you will see 3 Tabs titled General, Questions and Attachments.
- By clicking the General Tab you will identify documents that are essential to the successful completion of the Pre-Qualification Questionnaire or PQQ, that must be completed if you are to be considered for Haulage Tendering opportunities later this year.



- Each of these documents must be downloaded to your computer.
- The Guidance Document must be reviewed so that you understand the requirements of this PQQ.
- The Operator Training and Vehicle Sheet are two spreadsheets that must be populated with the details of the operators and vehicles that you intend to use if you are to be considered for a Haulage Services tender.
- Don't forget to list the details of your sub-contractors on these spreadsheets if you intend to use any for a prospective tender.



Your Response | ERSP1000727

Decline Messages Validate **Save Draft** Submit

From here you can edit your response by completing the various steps within the wizard below, or process it using the options below.

General **Questions** Attachments

! Please complete the following questionnaire from Coillte. Your answers will be automatically saved every five minutes. You can return to any time if you want to stop and finish off later.

! Click or touch the headings to expand each section. You must fill in all questions with a * next to them.

- 1: Tender Response (0 questions)
- 2: Company Information (8 questions)**
- 3: Tender Offering (1 question)
- 4: Financial Information (6 questions)

Innovative & sustainable management of natural resources

- On completion of the General section and the saving of your operator and vehicle details to your computer, you will then click the Questions Tab.
- This tab will provide further information regarding the Pre-Qualification Questionnaire and it will also list the questions that need to be answered.
- By clicking on the arrow to the left of each Title, you will expand each section that will identify the questions that you need to answer.
- Upon answering a question please ensure that you click **Save a Draft** so that you save the detail that you have entered.



^ 2 : Company Information (8 questions)

Company Information

2.01 Name of Company *

We Haul Timber Ltd

2.02 Name of Person Completing Form *

Joe Logs

2.03 Position Held in the Company *

Managing Director

2.04 Address: *

3 Pine View,
Roundwood,
County Clare

- For example here we are viewing the section relating to questions on company information that have been answered.

- Some questions will require a document to be uploaded to complete the question.
- In this example you are required to attach the document that details your vehicle fleet.
- You can do so by clicking attach file, circled in red here, and following the steps to upload the document that you have pre-populated and saved to your computer.

11: Vehicle Fleet (2 questions)


Details of Vehicle Fleet


11.01 Please give details of the machinery you own or intend to sub-contract for the purposes of timber haulage:
Please note if successful in acquiring a Coilte consigned haulage contract it is a requirement that all your timber haulage fleet is equipped with 'Vehicle' technology system. The Bluetree identifier Logo must be displayed clearly on the truck and each trailer must have a Bluetree Plate unique to each trailer.

A completed project participation agreement must be in place.

1. Coilte will require full access to all data from the ICTS (in cab technology system).
2. Electronic timber removal permits will be issued through the ICTS and all hauliers are required to use the new electronic system as outlined in the project participation agreement.

11.02 Please update the document entitled "Vehicle Fleet" which is located in the GENERAL tab under REQUEST DOCUMENTS. Enter details regarding the services you intend to use to provide the required services. Please complete all sections. Then upload the completed document here.

 Attach file... *Or drag and drop a file here*

 Vehicle Fleet.xlsx

Navigation: General Questions **Attachments**

! If required please use the options below to add Attachments to your response. Select an attachment type, add or drag and drop a file and files'.

Your Files

Attachment Type
Select a type...

Attach files... Or drag and drop files here

Uploaded Files

Name	Type	Download
0		

- On completion of the Questions section you can then select the attachments tab.
- This section allows you to upload additional files that you may wish to add to the PQQ that you are submitting.



Your Response | ERSP1000727

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

! Please complete the following questionnaire from Coillte. Your answers will be automatically saved every five minutes. You can save any time if you want to stop and finish off later.

! Click or touch the headings to expand each section. You must fill in all questions with a * next to them.

1: Tender Response (0 questions)

2: Company Information (8 questions)

- When you are satisfied that you have successfully populated the 3 tabs with the information required you will need to click the Validate button circled in Red here.
- This will identify if you have completed the PQQ with all of the required questions.

coilte

Your Response | ERSP1000727

Decline Messages Validate Save Draft Submit

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above

General Questions Attachments

Please complete the following questionnaire from Coilte. Your answers will be automatically saved every five minutes. You can also hit any time if you want to stop and finish off later.

Click or touch the headings to expand each section. You must fill in all questions with a * next to them.

1: Tender Response (0 questions)

2: Company Information (8 questions)

Innovative & sustainable management of natural resources

- Here we see that the questions tab has a red exclamation mark.
- This identifies that there are questions that have not been fully completed.



- In this example the turnover for the previous financial years has not been populated as required.

Financial Information

4.01 Please provide details of turnover (If Group turnover please state Irish/EU proportion separately) in respect of the last two years. (If you are a state aggregated turnover). In the case of more recently established organisations please provide pro-rata figures. *

€5,000,000

4.02 Turnover (€) in most recent financial year (2015) *

Please enter a number.

4.03 Turnover (€) in previous recent financial year (2014) *

Please enter a number.



Your Response | ERSP1000727

- Decline
- Messages
- Validate
- Save Draft
- Submit

From here you can edit your response by completing the various steps within the wizard below, or process it using the options below.

- General
- Questions
- Attachments

! Please complete the following questionnaire from Coilte. Your answers will be automatically saved every five minutes. You can stop at any time if you want to stop and finish off later.

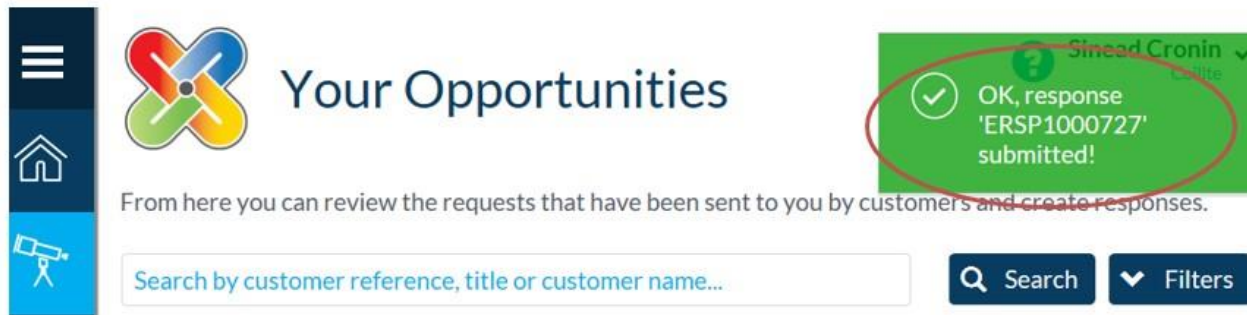
! Click or touch the headings to expand each section. You must fill in all questions with a * next to them.

1: Tender Response (0 questions)

2: Company Information (8 questions)

- Once you have successfully validated your draft and you are satisfied that you have provided the correct information, you can proceed to click the Submit button to submit your completed PQQ.

- A green note identifying **Ok Response** will appear on the screen to confirm that you have successfully submitted your PQQ.
- It is extremely important that you see this note as it confirms that your submission has been received.



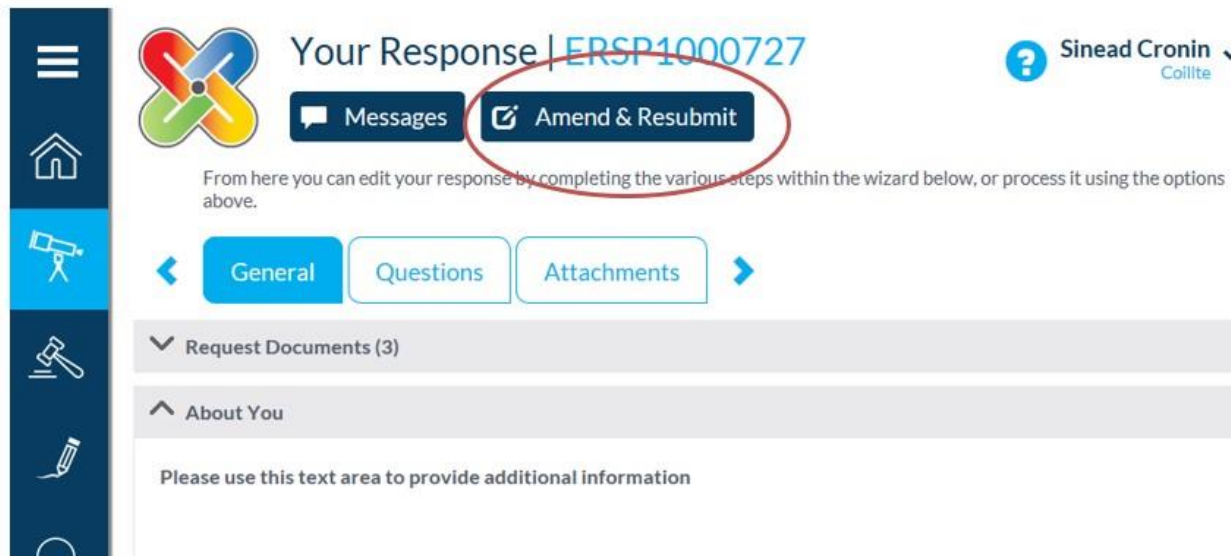
Your Opportunities

From here you can review the requests that have been sent to you by customers and create responses.

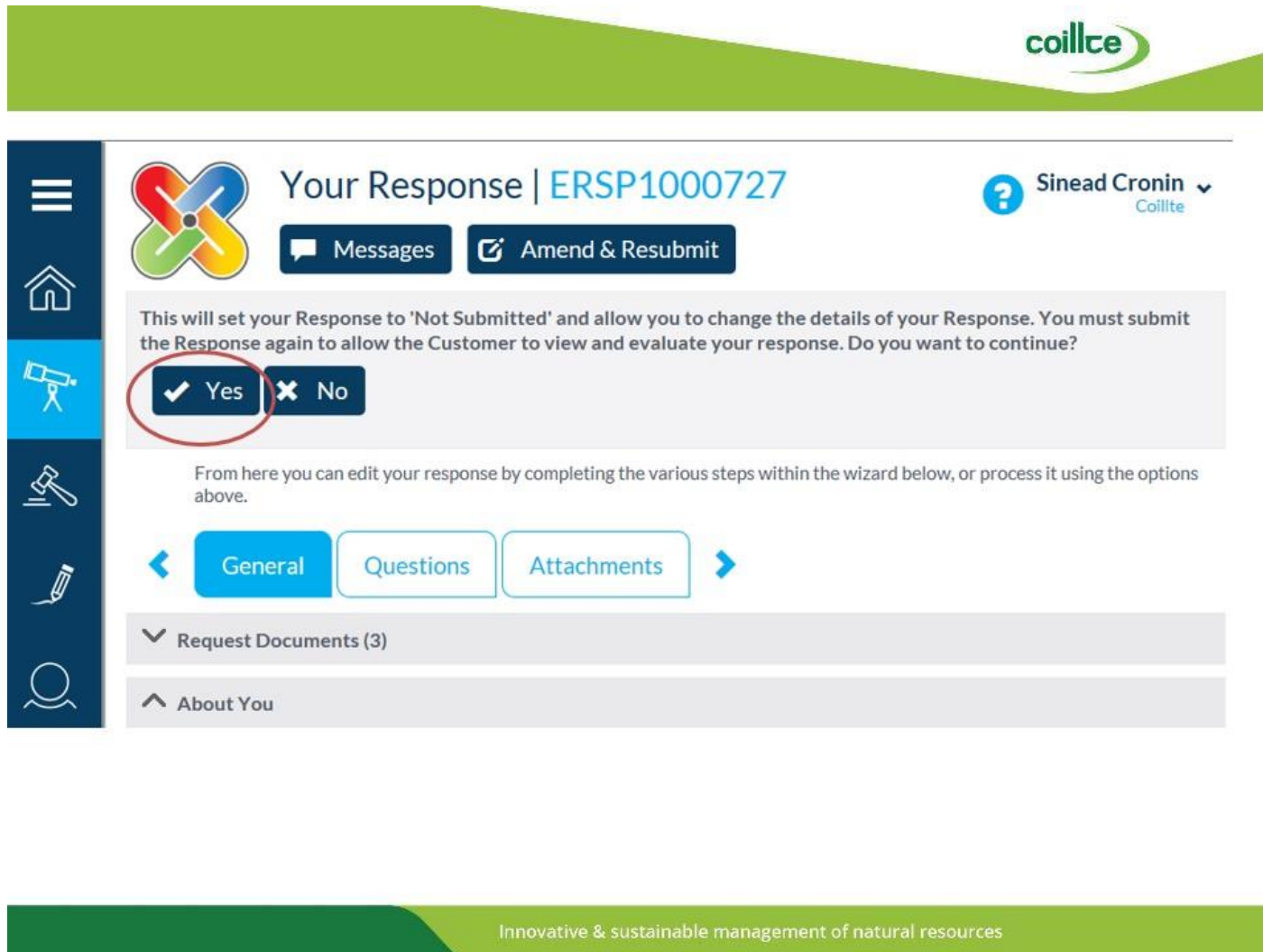
Search by customer reference, title or customer name...

Search Filters

- Prior to the closing date of the PQQ you can still Amend and Re-Submit your PQQ if you wish to make changes.
- To do so you must first click the Amend & Resubmit Button.



The screenshot shows the 'Your Response' page for request ERSP1000727. The user is Sinead Cronin. The page features a navigation menu on the left with icons for home, a document, a hammer, and a pencil. The main content area includes a 'Messages' button and a circled 'Amend & Resubmit' button. Below these are navigation tabs for 'General', 'Questions', and 'Attachments'. The 'Request Documents (3)' section is expanded, and the 'About You' section contains a text area for additional information.



The screenshot shows the 'Your Response | ERSP1000727' page in the Coillte Proactis web portal. The user is Sinead Cronin. The page features a navigation sidebar on the left with icons for home, messages, and profile. The main content area displays a confirmation message: 'This will set your Response to 'Not Submitted' and allow you to change the details of your Response. You must submit the Response again to allow the Customer to view and evaluate your response. Do you want to continue?'. Below the message are two buttons: 'Yes' (with a checkmark icon) and 'No' (with an 'X' icon). The 'Yes' button is circled in red. Below the confirmation message, there is a section for editing the response, with a wizard navigation bar showing 'General', 'Questions', and 'Attachments' tabs. The 'General' tab is currently selected. Below the wizard, there are sections for 'Request Documents (3)' and 'About You'.

- To make changes you will need to click the Yes button.
- Upon addressing the changes that you wish to make, you will need to follow the previous steps outlined to successfully complete your PQQ submission.



Contact for further queries regarding PQQ submissions via the Proactis Web Portal

Sinead Cronin

Procurement Category Manager, Coillte Forest | Coillte
Unit 4, Cavan Enterprise Centre (Phase 2), Killygarry, Cavan, Co. Cavan

E Sinead.Cronin@coillte.ie

T +353 49 4380030

M +353 87 1349072

www.coillte.ie



Thank you

Innovative & sustainable management of natural resources