# **II. ACEN® Working Website™ Tools - BidGetter™**

Your ACEN Working Website<sup>™</sup> is made up of a collection of modular Working Website<sup>™</sup> Tools, customized for your specific needs. The Working Website<sup>™</sup> Tools work together seamlessly to exchange information with your clients, customers, suppliers, employees, or associates.

Using the Working Website<sup>™</sup> tools, your ACEN website works for you, 24/7—with a minimum of effort on your part. What's more, as with all ACEN Tools, there's no technical knowledge required.

Many Working Website<sup>™</sup> Tools use the ACEN Contact Manager database as a basis for exchanging information. The Contact Manager is an electronic list of contacts important to your business. Detailed information about the Contact Manager can be found in Section I of this document.

#### Overview

The Working Website<sup>™</sup> Tools that use the contact database are:

- 1. Library<sup>™</sup>, a tool to post and share documents and information in a variety of useful ways;
- 2. **Portfolio**<sup>™</sup>, where you can post your best work for the world to come and see, and target the most important folks—your customers and contacts;
- 3. Notifier<sup>™</sup>, a place to store your news, bulletins, and events, and broadcast them to your contacts; and
- 4. **BidGetter**<sup>™</sup>, where you can easily post and track your job bidding online.

#### Definitions

Before we go further, let's demystify some jargon with a few definitions:

**Contact** is an individual associated with your website or business, such as a client, customer, or supplier (you decide how to classify your contacts). A contact is eligible to receive news and information about your company via your ACEN Working Website<sup>™</sup> Tools. Typically, contacts manage their own accounts, deciding what options they do and don't want.

**Document** is an electronic file, such as a Microsoft Word file or PDF (Acrobat) file that is posted on your website. Typically, a document is associated with a specific project posted on your site. Interested users of your website can easily download, view, and/or print these documents.

## **4. BidGetter**<sup>™</sup>

BidGetter<sup>™</sup> puts a planroom in your website, allowing you to easily bid your jobs. Individual bidders register on your website, and are notified through your site and via e-mail of addenda and awards.

To view BidGetter<sup>™</sup>, click on the BidGetter link in the navigation bar (at left). The BidGetter<sup>™</sup> module is displayed:



The BidGetter™ page.

The BidGetter<sup>™</sup> module consists of two main sections:

- a. a list of **Projects** (displayed by default); and
- b. a list of **Documents**.

Click on the links at left to navigate between these two sections. Note that **Projects** are displayed by default.

### • Project List

The Projects page contains a listing of projects (posted by you, by default):



The Projects page.

Three general options are displayed at the top of the page:

**Add a New Project** enables you to add a new project by entering a title and description, then selecting access permissions (who will be able to see it on your website).

Order Your Projects allows you to choose the order of displayed Projects.

**View All Projects/View My Projects** displays a list of all Projects, or just the ones you've posted. (Note that you can only edit you own Projects.)

#### The Project List Toolbar

The Projects page includes a toolbar that allows you to edit and manipulate the projects in the list:



You can modify individual projects directly, or modify multiple projects at once. The principle is this: to modify an individual project, click on the desired icon in that project's row; to modify multiple projects, select the projects that you want to modify, and then click on the desired icon in the toolbar.

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2.	Ŷ	Project Phase I	09/11/2003	Edit	Delate	۲
з	Ŷ	Project Phase II	09/11/2003	Edit	Delete	G

Deleting an individual project.

For example, if we want to delete the "Project Phase I" project (see figure above), we simply click on "Delete" under the Delete column in that same row.

			🗹 Check All 🎽 Clear All 💡 Activate	Peactivate	elete		
#	Select		Project Name 🕶	Posted On 🕶	Edit	Delete	Add Docs
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2.		💡 [	Project Phase I	09/11/2003	Edit	Delete	٠
з.		💡 [	Project Phase II	09/11/2003	Edit	<u>Delete</u>	٠
4.		💡 [	Project Phase III	09/11/2003	Edit	<u>Delete</u>	
5.		💡 [	Project Phase IV	09/11/2003	Edit	Delete	٠
6.	•	💡 [	Project Phase V	09/11/2003	Edit	Delete	٠

Deleting multiple projects.

If we want to delete both "Project Phase I" and "Project Phase V," we select these two contacts by checking *both* checkboxes  $\checkmark$  (under the Select column) and then clicking "Delete" l Delete in the Toolbar (see figure above).

Here are some definitions:

Check All selects all displayed projects

Clear All clears the checkboxes of all the displayed projects.

Activate makes the selected projects "active" or visible on the website.

**Deactivate** makes the selected projects "invisible" or "inactive" on the website. This is a convenient way to temporarily "shut-off" a project.

Delete permanently removes the selected projects from the database (as in our example above).

#### **Individual Project Controls**

Each item in the project list has several useful controls, defined as follows:

**Light Bulb ?** or **?** allows you to activate/deactivate any project. The yellow bulb indicates a visible project; a gray bulb indicates an invisible project. Click to toggle the project on/off.

**Project Name** clicking on the project name displays a summary of that project (see "View Project Summary" below). Note that clicking on the column label sorts the list by project.

Posted On clicking on the column label sorts the list by date posted.

Edit allows you to edit that project.

Delete permanently removes the selected project from the database (as in our example above).

Add Docs 主 allows you to add downloadable documents to your project (and set any desired access permissions).

### **Adding/Editing Projects**

To add a project, click on "Add a New Project" from the main Projects page (also see "The Project List," above).



The "Add a New Project" link.

To edit an individual project, click on "Edit" (from the Project List page, above) or on the Modify icon (from the "Project Summary" page; see section below):

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ACEN Engine Room	A	dd a new Pr	oject	Q	Order Projects			to all Proje	<u>cts</u>
Bidgetter ?	Summary								Delete
Projects	<u>Cumulary</u>	Project		1. D.	<b>Bidding Info</b>			Documents	
Documents	Modify	Set Access	Select Contacts	Plan Holders	Bidders	Docs Intro	Add	View	Download
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<u>Group Manager</u>			-	1					
Contact Registry				Projec	t: Project I	Phase I			
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Adding/Editing a project.

You may now add/edit the items on the form, including the project title, description, categories, documents, etc. Note that this page also displays information about who posted the project.

#### **Project Editing Toolbar**

While editing a project, a toolbar appears at the top of the page:

Summary								Delete
	Project			<b>Bidding Info</b>			Documents	
Modify	Set Access	Select Contacts	Plan Holders 浚	Bidders 🤌	Docs Intro	Add 主	View	Download

Project Editing Toolbar.\*

Here are some toolbar definitions:

Summary displays a non-editable summary of the current project.

**Delete** deletes the current project.

Modify allows you to edit the attributes of the project (this is the page you're currently on).

**Set Access** allows you to set access for the project (i.e., who can see the project; see "Setting Project Access, Step 1" below).

**Select Contacts** allows you to select the contacts that have access to the project (see "Setting Project Access, Step 2" below).

Plan Holders displays a list of individuals (potential bidders) who have viewed this project.

Bidders displays a list of individuals who have bid on this project.

Docs Intro allows you to edit the introduction and/or disclaimer text for this project.

Add allows you to add documents to your project.

**View** displays the "Project Summary" page, as above (see section below).

Download allows you to set access for the project (who can see the project).

\* Note that the toolbar is divided into three sections: (1) Project, (2) Bidding Info, and (3) Documents:

### **Ordering Projects**

To order your Projects, click on "Order Projects" from the main Projects page (see "The Project List," above). The "Order Projects" page is displayed:

4	Unlock the P	ower of the	Internet!"
ACEN	A	CEN BidGetter <sup>™®</sup>	1
ACEN Engine Room Bidgetter ? Projects	Add a New Project	Order Projects	View My Projects
Documents	# Project Name	• Posted On •	Project Position No.
<u>Group Manager</u>	1. Olean YMCA - Phase 1	10/02/2003	-1
Contact Registry	2. Project Phase 2	10/02/2003	- <u>1</u>
Frontend	3. Project Phase I	09/11/2003	5
ACEN	4. Project Phase II	09/11/2003	5
ACEN	5. Project Phase III	09/11/2003	5
ACEN	6. Project Phase IV	09/11/2003	5
ACEN	7. Project Phase V	09/11/2003	5
ACEN		Submit	

Ordering Projects.

You may now re-order the Projects in the list by changing the numbers under "Project Position No." at right. Click "Submit" when you are done.

\* **Note**: to sort alphabetically by name, change all the Position Numbers to "1" (or to any identical number).

### **Project Summary Page**

The Project Summary page contains basic information about the project, including the project's documents.



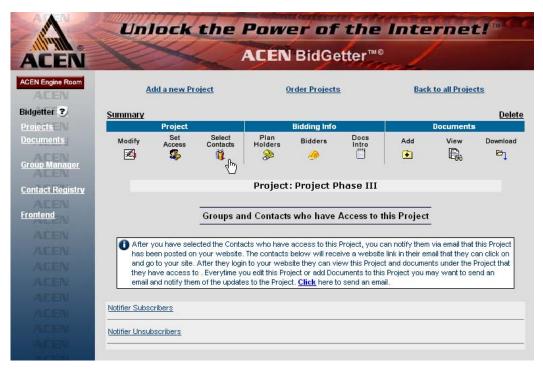
Project Summary page.

\* **Note**: on this page, information is **not** editable.

### **Setting Project Access**

#### Step 1:

To set who can see your project, click on **Select Contacts** from the Project Summary Screen. The Groups and Contacts page displays:



Setting project access, Step 1.

Select a group to give that group permission to see the project. You can select from (1) **Public** (any visitor to the website), (2) **Registered User** (any user registered on the website), or (3) any of the groups you created in the **Group Manager**.

Click "Submit" when you're ready to proceed to Step 2.

#### Step 2: (a.k.a. "Project Team")

After hitting "Submit" in Step 1 above, the Contact Access page displays. This page contains more information about the groups allowed to see your project (selected in Step 1). Here, you must set access for the individual contacts within each group:

	Topic				Documents		People
View 60		ceport Delete		Add 主	View	Download	Project Team
	Conta	icts w	nho have Access	to Topic - <mark>Zinc</mark> I	ls Our Friend	<u></u>	
has bee and go they ha	ou have selected the ( en posted on your we to your site. After the we access to . Everyti lify them of the update	osite. T / login f ne you	The contacts below v to your website they a edit this Topic or ad	will receive a well y can view this To dd documents to t	bsite link in the opic and docur	ir email that they nents under the 1	can click on Fopic that
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Setting project access, Step 2.

You may now make refinements to the groups you've already selected by clicking on a group under the "**Add/Remove People**..." column. Let's try an example:

When we click on the "Select 'Colleagues' for this Project" link, an options page is displayed:

You can select contacts for - 'Topic Colleagues' Group in one of two ways									
Option 1: Set it equal to the Contacts in the 'Master Colleagues List' at all times. Option 2: Select Contacts from the current 'Master Colleagues List' and/or from the 'Master Contact Registry'									
		Lindete Texie	D = II = =						
Update Topic Colleagues									
5	Option 1								
	•	Maetor Colload	1.0e' I	iet at all timoe					
	Equal to ALL Contacts in the								
	i.e. if you add a contact to the 'Maste								
	delete a contact from the 'Master Coll				nay want to choose				
t	his option when the contacts in a 'Ma	aster Group' remain sam	e from	Topic to Topic.)					
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	Select Contacts from the - 'N - -	<u>Thomas</u> Colucci Tony nm nm		- - 3r3r -	<u>Beam Tom</u> <u>Doe John</u> <u>Ross Ravelin</u>				
:	Select Contacts from the - 'N - - - ACEN -	Thomas Colucci Tony nm nm Brickhouse Tom		- - 3r3r -	Beam Tom Doe John Ross Ravelin mahanatra Niiharii Ualley tilli				
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Refining project access.

You may select **all contacts** in this group (Option 1) or limit access to **certain members** in this group (Option 2). If Option 2 is selected, be sure to double-check your selections before clicking "Update Project Colleagues."

Add / Remove People from a Topic Group		List of Contacts in 1	opic Group	Remove Contacts
Select 'Architects' for this Topic		All Contacts in Maste	<u>r Architects</u> List	Remove
	<b>B</b>	Lafarge North America - Olmsted & Vaux Landscaping, LLC	O'Connell Don Harman Ray	<u>Remove</u> <u>Remove</u>
Select 'Colleagues' for this Topic	<b>B</b> <b>B</b>	- Zinc Corporation of America - Zinc Corporation of America -	<u>DeLorraine Bill</u> Lawler Mike	Remove Remove
		Zinc Corporation of America -	Young Norm	Remove

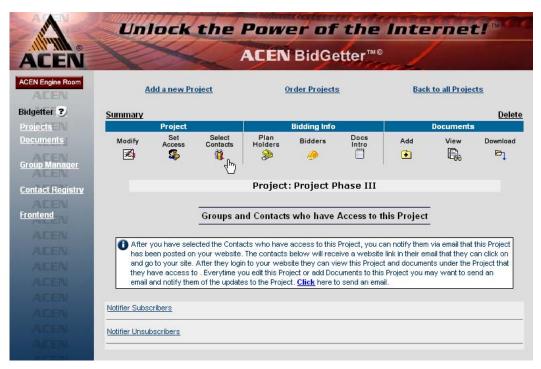
Refining project access.

In this example, we added Mike Lawler (from Zinc Corporation of America) to our list. Note the changes above.

### **Selecting Project Contacts**

#### Step 1:

To set who can see your project, click on **Select Contacts** from the Project Summary Screen. The Groups and Contacts page displays:



Setting project access, Step 1.

Select a group to give that group permission to see the project. You can select from (1) **Public** (any visitor to the website), (2) **Registered User** (any user registered on the website), or (3) any of the groups you created in the **Group Manager**.

Click "Submit" when you're ready to proceed to Step 2.

### **Adding Documents**

#### Step 1:

Click on the "Add" icon in the toolbar to add a document to your project:

	Project			<b>Bidding Info</b>			Documents	
Modify	Set Access	Select Contacts	Plan Holders 🏓	Bidders 🥜	Docs Intro	Add •	View	Download

Adding documents, Step 1-A.

Enter any memo information you desire, and select the groups eligible to see the project:

Add a new Projec	<u>t</u>	Order Projects			Back to all Projects		
<u>Summary</u>							<u>Delete</u>
Project			Bidding Info			Documents	
Modify Set Access C	Select Contacts H	Plan Iolders	Bidders 🏈	Docs Intro	Add 主	View	Download
		Project	: Project P	hase I			
	-	Select D	BIN For Doo				
Project Name							
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Active Document	• Yes C	No					
Select Groups Eligible f	or Documen	t Access	;				
🔽 Registered Contacts							
Select from above Or select from below	- But not	t from bo	th				
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Adding documents, Step 1-B.

Click "Continue to Upload" when you're ready to move on to Step 2.

#### Step 2:

After clicking "Continue to Upload" an upload page is displayed:

	nny ',' or '# signs and other special characters that appear in names that you are uploading will be replaced by an gn.
	Place Documents in the BIN
Project	t Project Phase I
Posted By	
<b>Doc Туре</b>	Specifications
Sub Type	08-Doors & Windows
Memo	Doors & windows are useful, beautiful, and required by law.
Posted for	Registered Contacts,
Files	Size

Adding documents, Step 2.

Click "Select" to upload individual files from your computer, or click "Select Folder" to upload entire folders. Use the "Remove..." buttons to remove uploads from the list.

Select Files for Uploading			Y X		
Look jn: 🔄 My Docum	ents 💌	🗢 🗈 💣 🗊-		Drowse for Folder Select Folder	<u>? ×</u>
Hiday Fiday Desison My Computer My Computer				Concepts  Conce	
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My Network P	C Open as gead-only		II.	Include sub-folders Scan	ncel

Adding documents: the "Select" and "Select Folder" dialogs.

Clicking "Select" or "Select Folder" displays a dialog box. Browse to the file/folder you want to upload and click either "Save" or "Scan." From the "Upload Documents" page, click "Upload"

Select	Select Folder	Remove	Remove All					

Adding documents, Step 2: the Upload button.

You may now verify your uploaded files in the Project Documents page:

Y	2	X		ACEN	BidGe	etter™			
	Ad	d a new Pro	ject	1	Order Projects	<u>8</u>	Back	<u>to all Proje</u>	<u>cts</u>
ımma	<u>πv</u>								Delet
		Project Set	Select	Plan	<b>Bidding Info</b>	Docs		Documents	8
Modif K		Access	Contacts	Holders	Bidders 🤗		Add	View C	Download
				Projec	t: Project	Phase I			
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Adding documents, Step 2: verify your uploads.

You're finished!

### **Downloading Documents**

#### • Single Documents

To download individual documents to your computer, check the document(s) you wish under the "Select" column at left, then click "Download Docs" in the toolbar:

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		activities 05 (jpg)	Jeff Belt	una est a	<b>–</b> 11

Downloading document(s).

#### • Multiple Documents

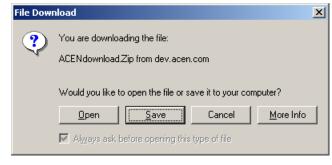
Click on the "Download" icon in the toolbar to download the project's document(s) to your computer:

CEN	K	0		ACEN	BidGe	etter™©			
N Engine Room	А	dd a new Pr	oiect	c	order Proiects	s	Back	cto all Proie	ets
etter ?	Summary								Del
ectsEIV		Project Set	Select	Plan	Bidding Info	Docs		Documents	
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Downloading documents, Step 1.

Select folders or individual files using the displayed list, then click "Download files/folders" at bottom.

This displays a download dialog box. Click "Open" to open the file(s) directly, or click "Save" to choose location on your computer that you'd like to download the document(s):



Download dialog box.

Choose a location on your computer to save the document(s):

Save As					? ×
Save jn:	🐴 My Documer	nts	•	🗢 🗈 💣 🎟•	
History Desktop My Documents My Computer	My Music My Pictures My Vebs				
	I				
My Network P	File <u>n</u> ame:	ACENdownload.Zip		•	<u>S</u> ave
	Save as <u>t</u> ype:	WinZip File		•	Cancel

Choosing a location to download.

Click "Save" to start the download. Download time will vary depending on the size of the document(s) and your internet connection speed.

### • Documents

You may view and manage your documents in the Documents section. Clicking on "Documents" at left brings you to the Manage Documents page:

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ACEN		2	5	ACEN BidGetter	TM ©	
ACEN Engine Room				Manage Documents Posted By	Jeff Belt	
Bidgetter <b>?</b> Projects			Add a t	lew Document	View All Documents	
Documents		2	To keep	track of changes you make to a Document		
<u>Group Manager</u>				croll to the Document Name lick on the "Modify Icon" for the Document		
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<u>Frontend</u>		5				
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	#	Select	State	Document Title •	Posted On •	Modify
	1.		8	Desktop (ini) 0.43 KB	12/10/2003	Edit
	2.		8	Sample (jpg) 9.89 KB	12/10/2003	Edit
	3.		8	<u>Urban Sprawl NYS</u> (pdf) 489.28 KB	12/10/2003	Edit

The Manage Documents page.

From this page, you may now add, edit, delete, activate/deactivate, or download documents.

By default, only the documents you posted are displayed. To display a list of all documents posted, click "View All Documents" at top right. To view the list by different Projects, by all Projects, by Doc Type / Sub-Type, or by Document Name, use the drop-down boxes:

Project	Project Phase I			
<b>Вос Туре</b>	Specifications			
	08-Doors & Windows 💌			
Document Name	08-Doors & Windows Select All			
	submit reset			

Viewing documents by different categories.

### **Adding Documents**

To add a new document click the "Add a New Document" link at top. Follow the instructions under the chapter "Adding Documents" above.

Add a New Document
Project Solor
Adding a document.

### **Editing Documents**

To edit a document, click "Edit" next to the document you wish to edit.

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#	Select	State	Document Title •	Posted On •	Modify
1.		Ŷ	Desktop (ini) 0.43 KB	12/10/2003	Edit
2.		Ŷ	Sample (jpg) 9.89 KB	12/10/2003	Edit
з.		P	Urban Sprawl NYS (pdf) 489.28 KB	12/10/2003	Edit

Editing a document.

The Manage Documents page will be displayed:

View     Modify     Delete       Image: Section 2016     Image: Section 2016     Image: Section 2016       Project Name     Project Phase I     Image: Section 2016       Poc Type     Specifications     Image: Section 2016       Sub Type     08-Doors & Windows     Image: Section 2016       Document Title     Desktop       Memo     Doors & windows are useful, beautiful, and required by Image: Section 2016       Document Link     Desktop.ini       Calick on the Browse button to edit or upload a new document)       Active Document     Yes Image: No Image: Section 2016	Bit     Image: Second sec
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	nk Desktop.ini Browse
Select Groups Eligible for Document Access	
Select from above	
Or select from below	

Editing a document.

After you're finished making your changes, click "Submit."

### **Deleting Documents**

To remove a document, select the checkbox in the item's row, then click "Delete" in the toolbar:

		C	neck All 🎦 Clear All 💡 Activate 🔮 Deactivate 📗 Delete	Download Docs	
#	Select	State	Document Title 🕶 💆	Posted On <del>•</del>	Modify
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2.	<b>v</b>	Ŷ	Sample (ipg) 9.89 KB	12/10/2003	Edit
	_	0	Urban Sprawl NYS (pdf)		

Deleting a document.

#### **Activating/Deactivating Documents**

An active document is visible\* on the website, and is indicated by a yellow light bulb; an inactive document is indicated by a gray bulb. Click on the light bulb to activate/deactivate a document:

1.	8 Im	Desktop (ini) 0.43 KB	12/10/2003	Edit
2.	8	Sample (jpg) 9.89 KB	12/10/2003	Edit
З.	P	Urban Sprawl NYS (pdf) 489.28 KB	12/10/2003	Edit

Activating/deactivating a document.

\***Note**: Documents under an inactive project will not be displayed. However, if any of those documents are crosslisted under another visible project, those documents will still be displayed.

### **Downloading Documents**

#### • Single Documents

To download individual documents to your computer, check the document(s) you wish under the "Select" column at left, then click "Download Docs" in the toolbar:

8	9.89 KB	12/10/2003	Registered Contacts	<u>cuit</u>
P	Urban_Sprawl_NYS (pdf) 489.28 KB	Jeff Belt 12/10/2003	Registered Contacts	<u>Edit</u>

Downloading document(s).

#### • Multiple Documents

To download documents to your computer, check the document(s) you wish under the "Select" column at left, then click "Download Docs" in the toolbar:

		Check All 🎽 Clear All 💡 Activate	Peactive	ate 🗓 Delete 🎴 Download Docs	
		Document Title	Posted By	Posted For	Edit
	P	<u>02</u> (jpg) 3.77 KB	Jeff Belt 11/21/2003	Notifier Subscribers , Notifier Unsubscribers	<u>Edit</u>
	8	accrijscript (txt) 69.10 KB	Jeff Belt 11/19/2003	Notifier Subscribers , Notifier Unsubscribers	Edit
V	Ŷ	<u>activities_05</u> (jpg) 16.35 KB	Jeff Belt 11/21/2003	Notifier Subscribers	Edit

Downloading document(s).

This displays a download dialog box. Click "Open" to open the file(s) directly, or click "Save" to choose location on your computer that you'd like to download the document(s):

File Dow	nload	×			
?	You are downloading the file:				
4	ACENdownload.Zip from dev.acen.com				
	Would you like to open the file or save it to your computer?				
	<u>Open</u> <u>Save</u> Cancel <u>M</u> ore Info				
	Always ask before opening this type of file				

Download dialog box.

Choose a location on your computer to save the document(s):

Save As				? ×
Savejn:	🖄 My Documents	•	🗢 🗈 💣 🎫	
History Desktop My Documents My Computer	Adobe My Music My Pictures My Webs			
	File name: ACENdownload.Zip		<b>_</b>	<u>S</u> ave
My Network P	Save as type: WinZip File		•	Cancel

Choosing a location to download.

Click "Save" to start the download. Download time will vary depending on the size of the document(s) and your internet connection speed.