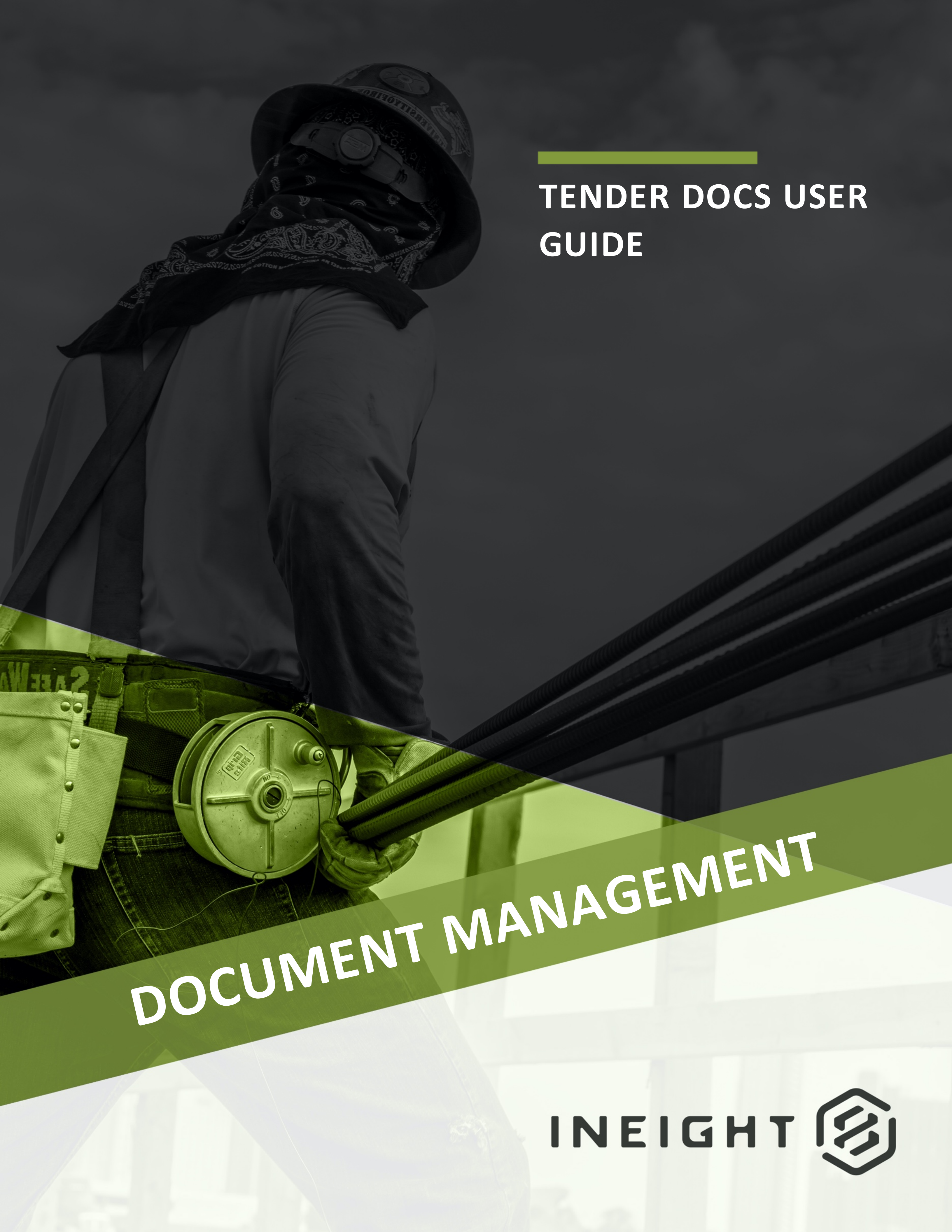


TENDER DOCS USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT

Release 19.7
Revision: 5
Last Updated: 20 January 2020

CONTENTS

CHAPTER 1 – INTRODUCTION TO THE TENDER MODULE

Tender Packages are a special type of package in InEight Document. Not only do they group together a set of documents with a set of recipients, but they also include built-in business processes (with notifications) to manage the Release for Tender, Sending Addendums, corresponding with Tenderers, Managing Submissions and Awarding the Package.

Tender Packages in InEight Document work in conjunction with a stand-alone website called TenderDocs. The concept behind TenderDocs is to ensure that Tenderers are NOT given access to the live InEight Document project, unless or until such time as they are awarded a tender.

After Tenderers receive an Invitation to Tender via email, they are directed to the TenderDocs website. Here they can use their unique login to download any specific documents released as part of the package. Using this website, the Tenderer is also able to correspond with the tender issuer regarding tender queries, probity concerns etc., and finally, submit their bid document in the requested format.

Once the Tender has been "Closed for Bidding" the submission documents become available for use/review (depending on how the Tender Issuer has set it up) to commence the selection process.

Once the selection has been completed, the Tender Issuer is able to award the package to a company, and only then are they given access to the InEight Document project and then granted access to the documents within your project automatically if required.

Note for the purposes of this document that "Tender Packages" in InEight Document relates only to the distribution of documents during the Bid/Tender process.

CHAPTER 2 – CREATING AND ISSUING A TENDER PACKAGE

2.1 CREATE THE PACKAGE DETAILS

1. Click **New** from the left menu and select **Package** and then **Tender Package**.
2. Enter in the package details, then click **Save**.

Field	Description
Package ID*	Package identifier.
Package Title*	Package Title.
Trade	Select the relevant trade the package belongs to.
Package Phase	Package Phase.
Awarded To	Company the package has been awarded to.
Approx Value	Approximate Package value.
Preferred Format	Format of soft copy submissions.
Package Security	Choose between Private and Public.
Long Title	Long Title field.
Details	Long Description field.
Hardcopy of Documents available from Company	Select the Company from where a hardcopy of a tender package can be obtained.

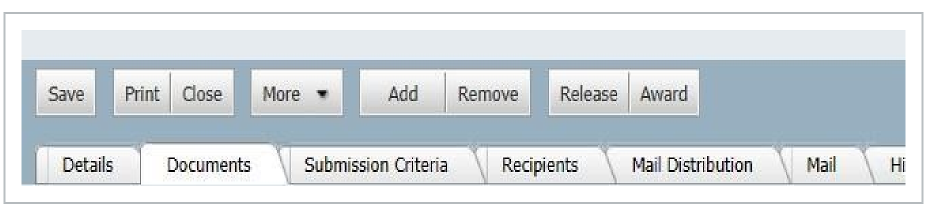
Field	Description
and Contact	
Automatically close Submissions at Scheduled Tender close times	Tick this box if Tender Packages must be closed for bidding automatically on the date and at the time defined against the Schedule Tender Close option below.
Design Release	Enter the Schedule, Forecast dates for this event. The Actual date is updated by the system.
Tender Release	As above.
Tender Close*	As above.
Tender Award	As above.
Start on Site	As above.
Finish on Site	As above.

NOTE

- Tender packages can be made either public or private.
- Public packages are viewable by anyone with a login to TenderDocs for that project.
- Private packages are viewable only to recipients of the package.

2.2 ADD DOCUMENTS TO THE PACKAGE

1. From the Tender Package details window, click the **Documents** tab.

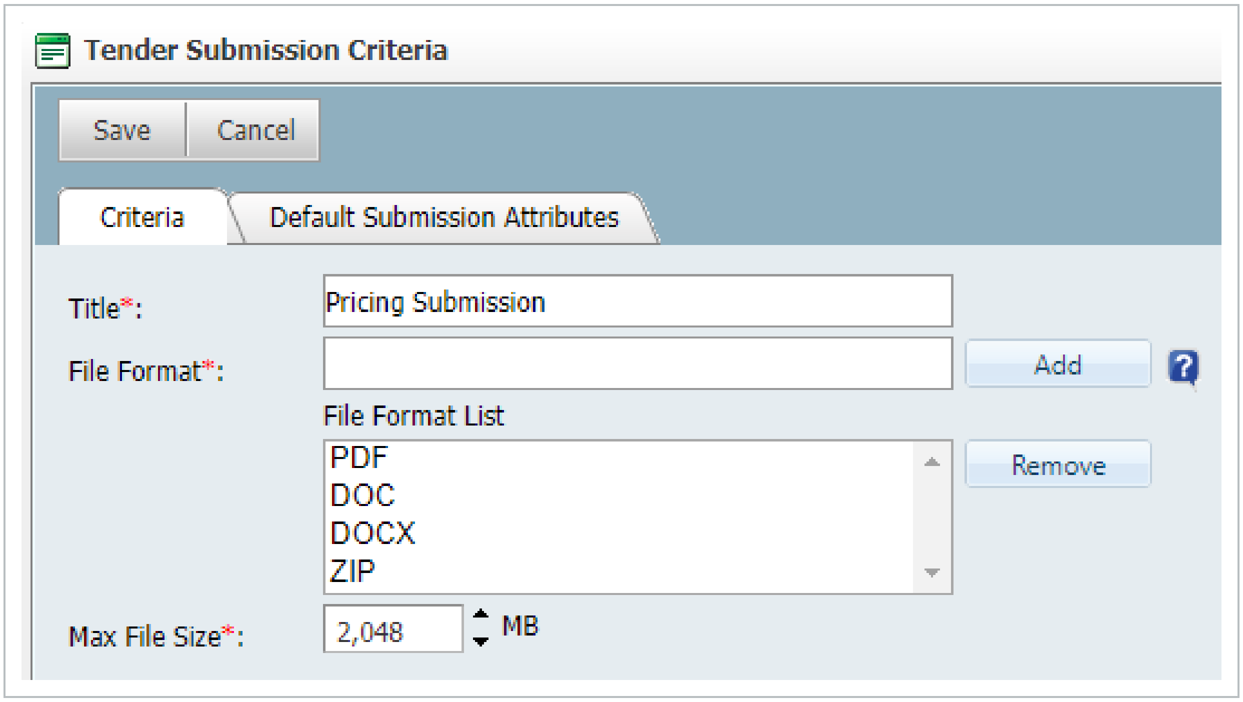


2. Click the **Add** button.
3. Use the **Search** button to find and select all documents required using the tick box above the first column.
4. Click **OK** then **OK** again in the confirmation window.

2.3 ADD SUBMISSION CRITERIA TO THE PACKAGE

1. In the Tender Package details window, select the **Submission Criteria** tab.
2. Click the **Add** button.

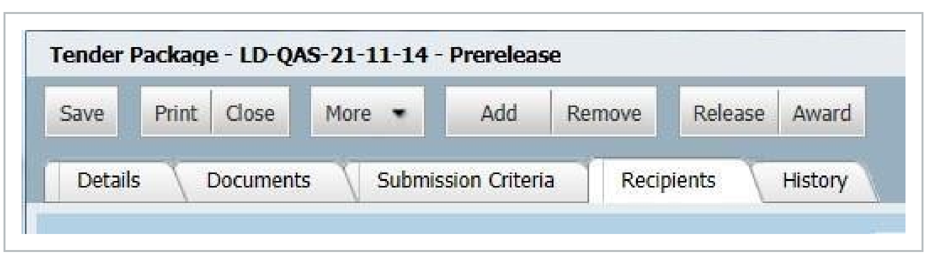
   In the **Criteria** tab, enter the title for Tender Submission Criteria and click **Add** to select the acceptable File Formats.



3. Select the **Max File Size** for the Tender Submission Criteria and then click **Save**.

2.4 ADD RECIPIENTS TO THE PACKAGE

1. From the Tender Package details window, select the **Recipients** tab then click **Add**.



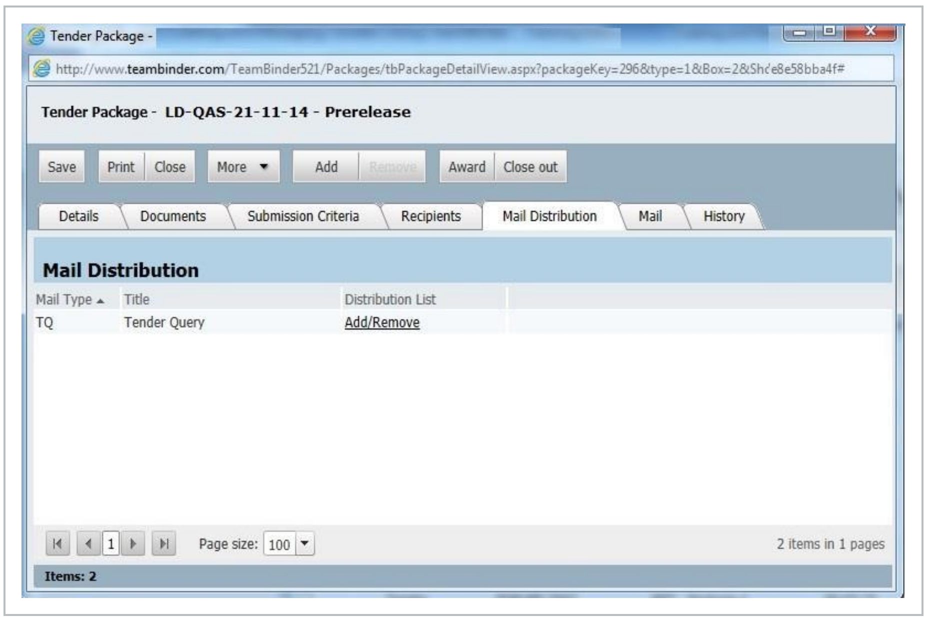
2. At the **Select Contacts** window, to add each contact, first select their company and then the contact.

3. Click **View Selected** at the top right of the window to see all contacts selected.
4. Click the **OK** button then **Yes** when prompted to add the recipients to the Package.
5. Click **OK** again at the confirmation window.

2.5 SETTING UP MANDATORY RECIPIENTS

Nominated recipients can be set up to receive and respond to all Tender correspondence. This mean the Tenderer is not required to select recipients when raising tender-related queries.

1. From the Tender window, click on the **Mail Distribution** tab.
2. Click **Add/Remove** against the mail type.



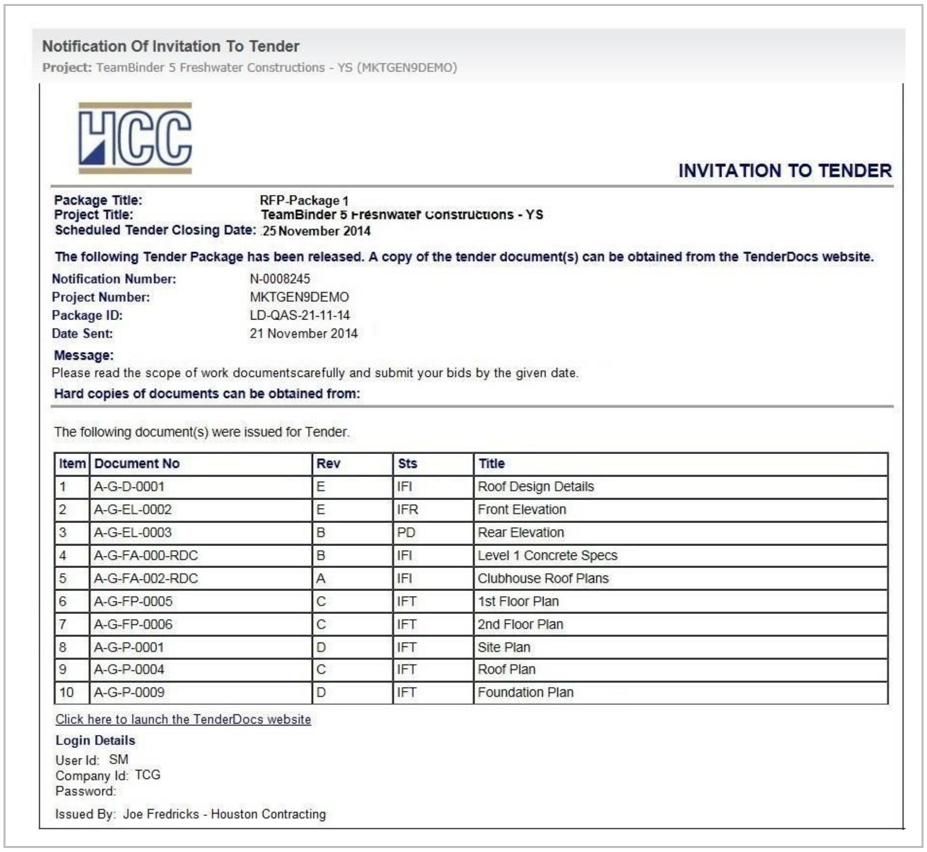
3. Select the relevant contact as the Mandatory recipient for the mail type then click **OK**.

NOTE	Mandatory settings can also be set at a project level.

2.6 RELEASING A PACKAGE FOR TENDER

Once all documents have been added to the package and the required Tenderers have been added as recipients, the package can be released for Tender.

1. Click the **Release** button to generate an Invitation to Tender.
2. Add the notification title and message.
3. Click the **Send** button and click **OK**, then **Close** when prompted.



Notification Of Invitation To Tender

Project: TeamBinder 5 Freshwater Constructions - YS (MKTGEN9DEMO)

INVITATION TO TENDER

Package Title: RFP-Package 1
Project Title: TeamBinder 5 Freshwater Constructions - YS
Scheduled Tender Closing Date: 25 November 2014

The following Tender Package has been released. A copy of the tender document(s) can be obtained from the TenderDocs website.

Notification Number: N-0008245
Project Number: MKTGEN9DEMO
Package ID: LD-QAS-21-11-14
Date Sent: 21 November 2014

Message:
Please read the scope of work documentscarefully and submit your bids by the given date.

Hard copies of documents can be obtained from:

The following document(s) were issued for Tender.

Item	Document No	Rev	Sts	Title
1	A-G-D-0001	E	IFI	Roof Design Details
2	A-G-EL-0002	E	IFR	Front Elevation
3	A-G-EL-0003	B	PD	Rear Elevation
4	A-G-FA-000-RDC	B	IFI	Level 1 Concrete Specs
5	A-G-FA-002-RDC	A	IFI	Clubhouse Roof Plans
6	A-G-FP-0005	C	IFT	1st Floor Plan
7	A-G-FP-0006	C	IFT	2nd Floor Plan
8	A-G-P-0001	D	IFT	Site Plan
9	A-G-P-0004	C	IFT	Roof Plan
10	A-G-P-0009	D	IFT	Foundation Plan

Click here to launch the TenderDocs website

Login Details
User Id: SM
Company Id: TCG
Password:

Issued By: Joe Fredricks - Houston Contracting

NOTE Email invitations will now be sent out containing login details and a link to <<your server URL>>/tenderdocs5 .

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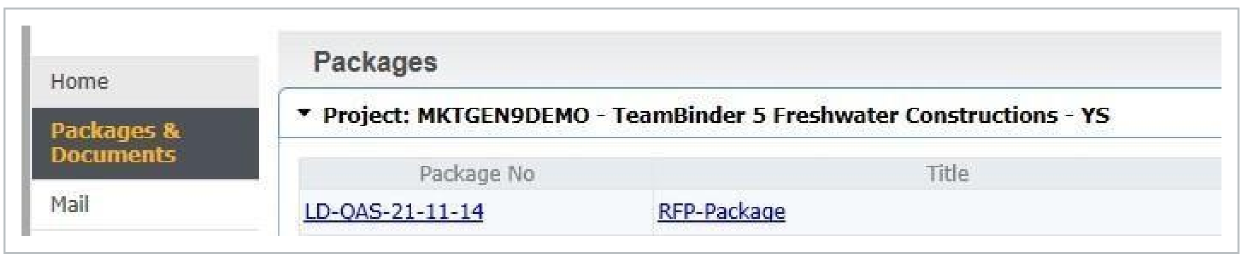
CHAPTER 3 – USING THE TENDERDOCS PORTAL

3.1 OVERVIEW

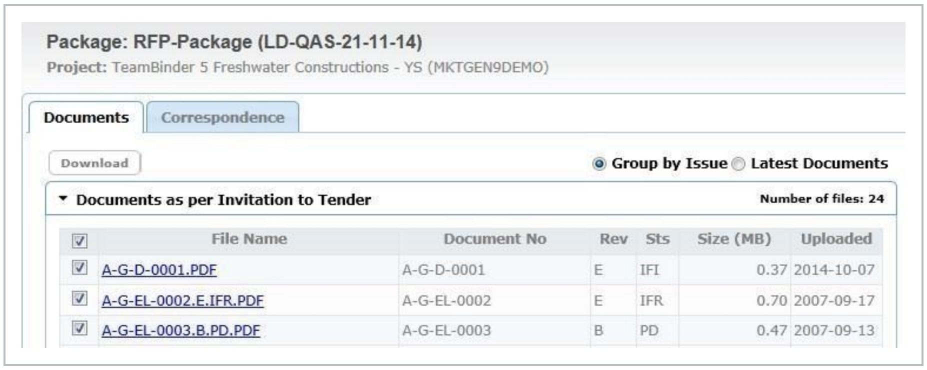
The TenderDocs portal is used by Tenderers to receive, manage and submit their tender documents and correspondence with the Issuing Authority.

3.2 DOWNLOADING DOCUMENTS FROM THE TENDERDOCS PORTAL

1. To launch TenderDocs, go to http://www.teambinder.com/TenderDocs5/ and enter the relevant login details (your URL will be as per your current INEIGHT Document server)
2. From the home page, select “**Packages and Documents**” from the left menu and click on the Package.

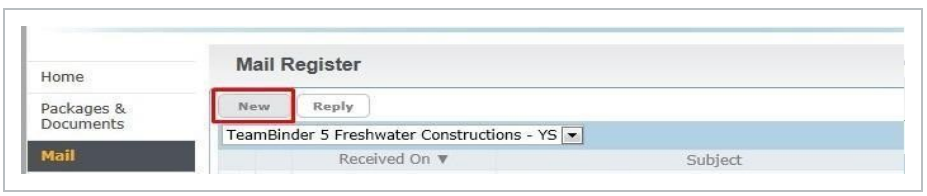


3. Select all documents and click “**Download**”.



CHAPTER 3 – SENDING TENDER QUERIES

1. To send a tender query, click **Mail**, then **New**. The recipient(s) will be added automatically.
2. Enter query details and click **Send** once complete.



3. The tender query recipient(s) can respond to tender queries raised by the Tenderers using standard InEight Document Mail.

CHAPTER 4 – ISSUING ADDENDUMS TO PACKAGES

4.1 OVERVIEW

During the tender period it is often necessary to send out additional documents or notices to the Tenderers as Addendums.

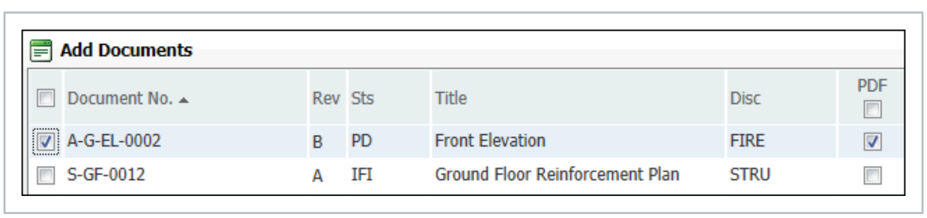
4.2 ADDING ADDITIONAL DOCUMENTS TO A TENDER PACKAGE

To issue an Addendum to Tender, first add the new document(s) to the package.

1. From the Package Register, double click to open the Package Details window.
2. Select the **Documents** tab and then click the **Add** button.
3. In the Search criteria window simply click the **Search** button.

NOTE By default only New Documents (i.e. documents not already in the package) will be displayed.

4. Locate and select the document(s) using the check box.

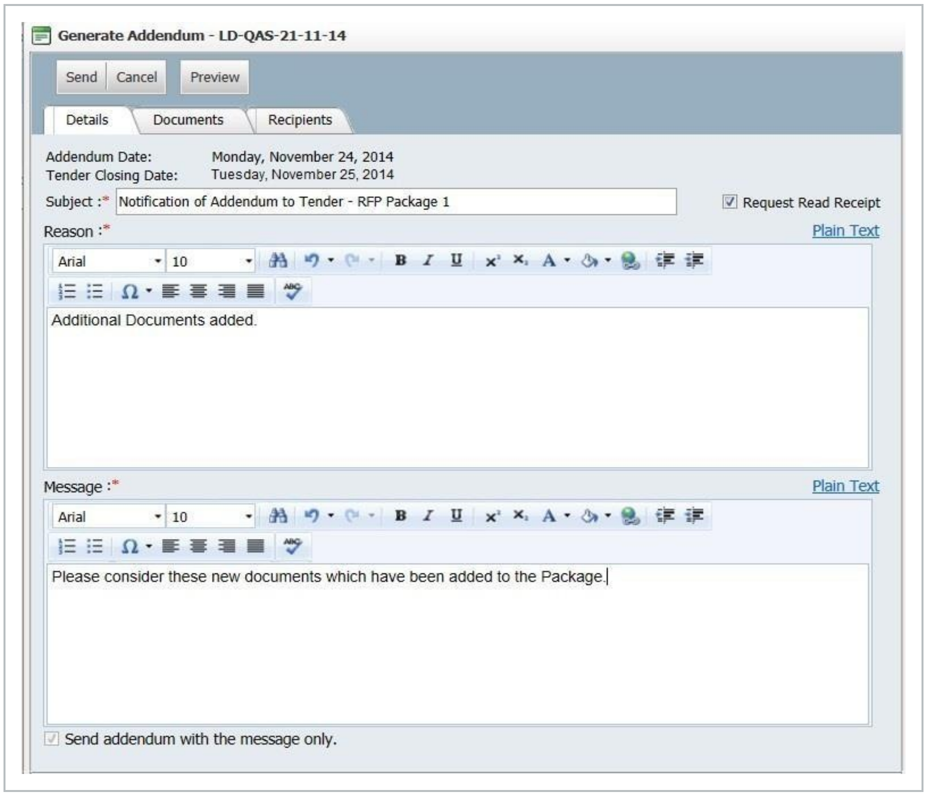

Add Documents

	Document No.	Rev	Sts	Title	Disc	PDF
☑	A-G-EL-0002	B	PD	Front Elevation	FIRE	☑
☐	S-GF-0012	A	IFI	Ground Floor Reinforcement Plan	STRU	☐

5. Click **OK** to add the selected document to the package click **Yes** when prompted to send out the addendum to tender or use the steps below.

4.3 GENERATING AN ADDENDUM TO TENDER

1. From the Package details window, click the **Generate Addendum** button.
2. Enter both a **Reason** for the Addendum and a **Message** in the fields provided as shown below.



3. Click **Send**.

CHAPTER 5 – SUBMITTING BID DOCUMENTS

Tender Submission is done via the TenderDocs Portal.

Tenderers can submit their bid document(s) according to the bid submission criteria.

1. From the TenderDocs portal, click **Submissions**.
2. Upload the relevant bid documents by clicking **Upload New or replace existing file** according to the relevant bid submission criteria.

3. Click **Complete Submission.** When all documents have been uploaded. An acknowledgement of successful bid submission message is shown.

CHAPTER 5 – PACKAGE MAINTENANCE

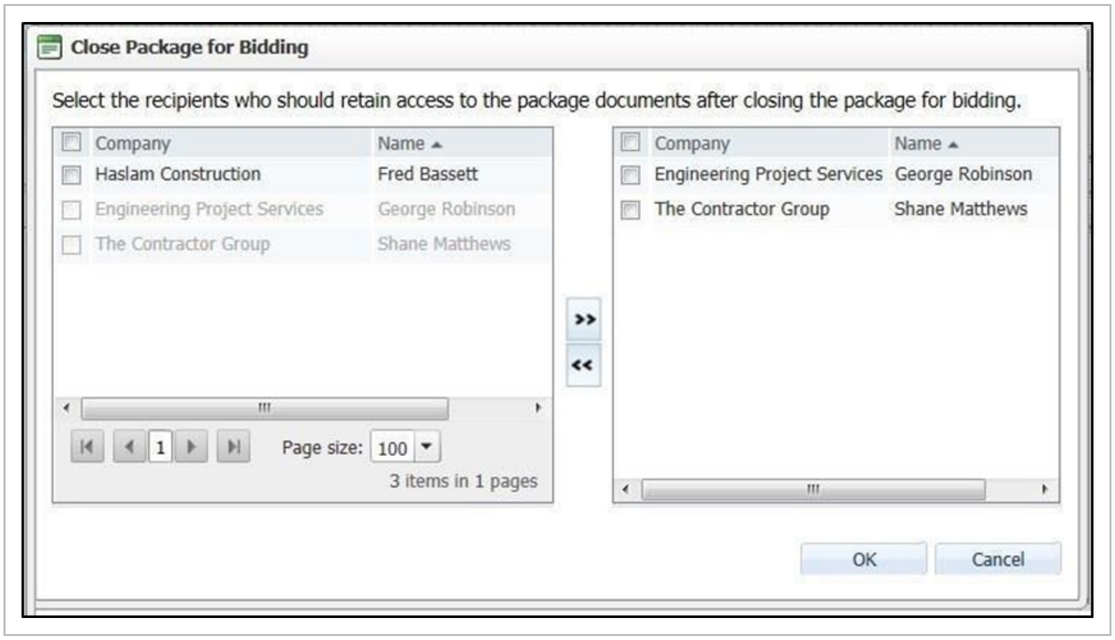
5.1 OVERVIEW

There are three further phases in the life cycle of a tender package that are also managed via the Package Details window. These are:

- Closing the package at the end of the tender period.
- Awarding the package to the successful Tenderer.
- Closing out the package when the works are completed.

5.2 CLOSING THE PACKAGE FOR BIDDING

1. Click the **Close Out** button from the Package Details window to open the “Close Package for Bidding” window.
2. Select all recipients who will retain access to the package after the tender period has finished or click **OK** without selecting any recipients if no future access is required.



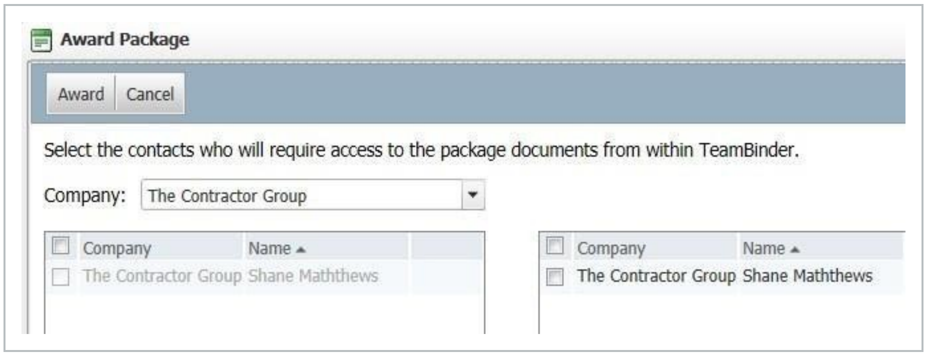
3. This will remove access to the tender documents on www.teambinder.com/tenderdocs5 for all recipients and the status of the package will be changed to **Closed for Bidding.**

CHAPTER 5 – REVIEWING/VERIFYING DOCUMENTS SUBMISSIONS

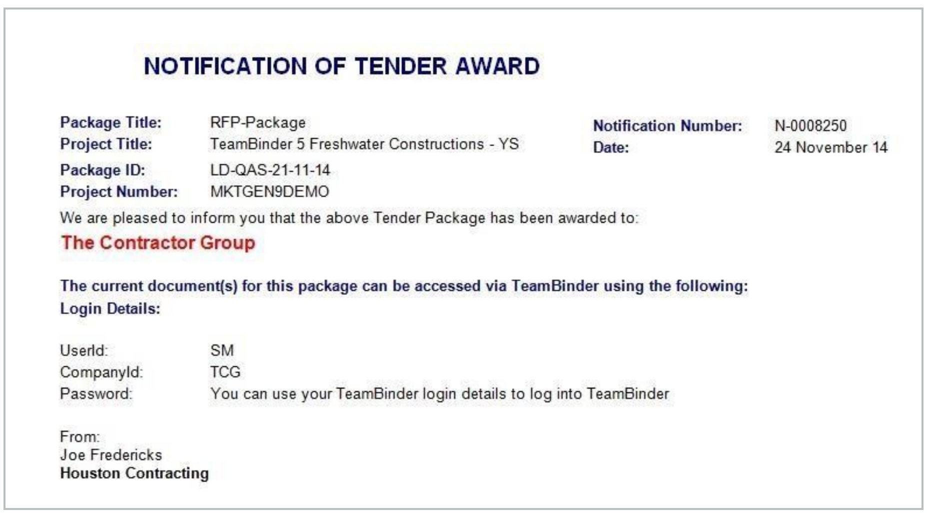
1. From the document register enter “Tender Submission” into the quick search field then click **Go**.
2. You should now be able to view the Documents that were submitted for your package.

5.1 AWARDING A PACKAGE

1. Once the documents have been verified and the Tenderer has been selected, open the package details again by double clicking on the package from the package register. Then click **Award**.
2. Select the company to award the package to the appropriate company from the list of recipients.



3. Use the tick box at the bottom of the screen to automatically send notifications about future revisions of the tender package documents if required.
4. Click the **Award** button and **OK** when prompted. Then click **Close**.
    a. A notice of award is now sent to the successful company and the selected contact(s) created as limited access users (with ongoing access to the package documents from within InEight Document).
    b. The other companies are also sent notifications informing them they have been unsuccessful.



NOTIFICATION OF TENDER AWARD

Package Title: RFP-Package
Project Title: TeamBinder 5 Freshwater Constructions - YS
Package ID: LD-QAS-21-11-14
Project Number: MKTGEN9DEMO

Notification Number: N-0008250
Date: 24 November 14

We are pleased to inform you that the above Tender Package has been awarded to:

The Contractor Group

The current document(s) for this package can be accessed via TeamBinder using the following:
Login Details:

UserId: SM
CompanyId: TCG
Password: You can use your TeamBinder login details to log into TeamBinder

From:
Joe Fredericks
Houston Contracting

5.2 CLOSING OUT THE PACKAGE

Once a package is completed (e.g. construction is complete), access to the documents in the package can easily be withdrawn.

1. Open the package details by double clicking on the package from the package register.
2. Click **Close-Out**.

CHAPTER 6 – PACKAGES REPORTS

6.1 USING THE PACKAGE DETAILS REPORT

There are several reports available for Packages including “010 – Packages – Sent Detailed Report” which details the history of all document issues during the package tender process.

1. Click the **Reports** button at the top menu.
2. Click the **Packages** group of reports on the left-hand side of the Standard Reports screen.
3. Select the report, enter search criteria and click **Search**.

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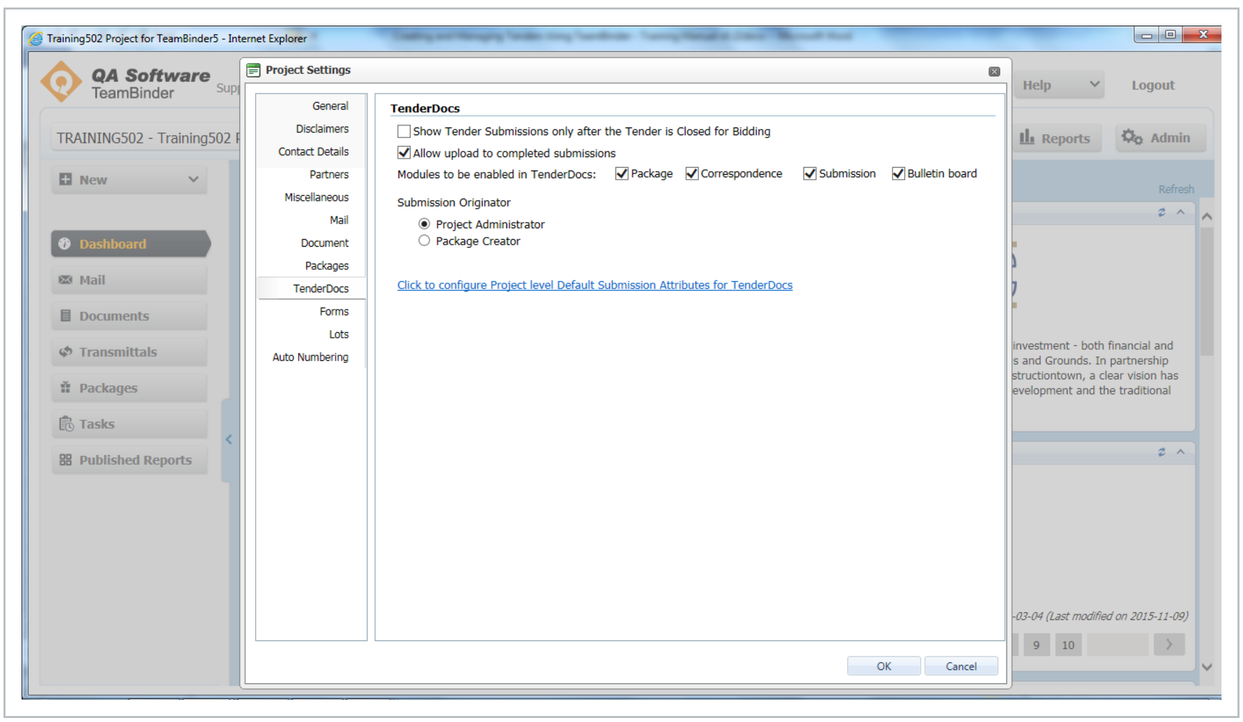
CHAPTER 7 – ADMINISTRATION SETTINGS

Prior to using InEight Document to issue Tender Packages, the following settings must be updated by an administrator.

7.1 DEFAULT SETTINGS

1. Click on the **Settings** button and select **TenderDocs** from the Left Menu.



2. Confirm the settings below.

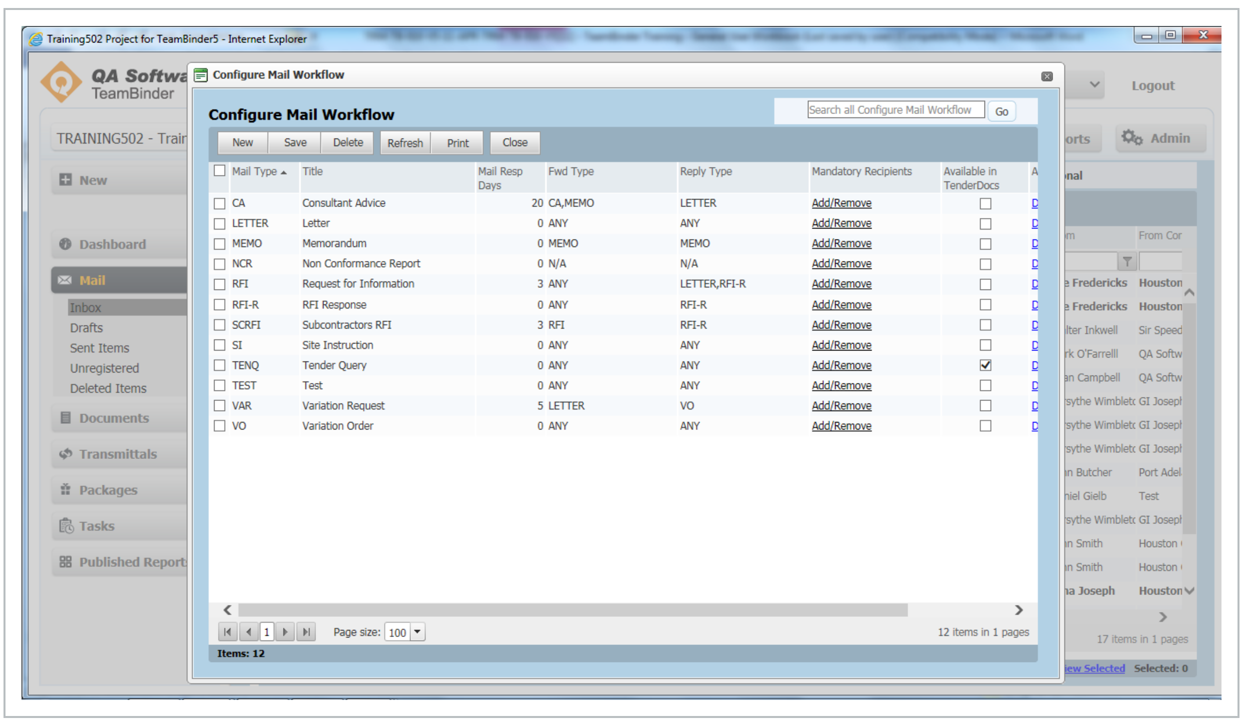
Setting	Recommended Option to be Selected
Allow Upload to completed submissions	Yes
Modules to be enabled in Tender Docs	Package, Correspondence, Submission
Submission Originator	Package Creator

3. Selecting “Click to configure Project level Default Submission Attributes for TenderDocs” will allow you to define the default submission document attributes once they are uploaded to the document register.

7.2 SELECTING MAIL TYPES FOR TENDERDOCS

Mail types need to be set up to enable Tenderers to receive and respond to correspondence through the TenderDocs portal.

1. From the Inbox register, click **More** and select **Configure Mail Workflow**.
2. Select **Available in Tender Docs** against mail types which should be used by the Tenderers.



7.3 SETTING UP TENDERERS

Each Tender package recipient needs to be set up in InEight Document as an external contact so they can receive the package and send and receive correspondence via the TenderDocs portal.

1. Create the Companies the Tender will be issued to under “Companies”.
2. Set up the Contacts within these companies under “Contacts”.
3. Ensure each Tenderer is set up with the “External Contact” option ticked.