The University of Manchester

Project Collaboration Tool

Tender Management Guide

https://uom.myconject.com

March 2017

The University of Manchester

conject

CONTENTS

This guide provides guidance on the use of Conject for subcontract tendering and procurement on all University of Manchester Construction Partnering Framework projects.

Users should consult the 'Protocol Document & Quick Start User Guide' for general queries on Conject for University of Manchester Framework projects. This provides general guidance on the use of Conject for project collaboration and the like e.g. document control.

The document only provides guidance on the use of Conject. Users must ensure that any Subcontract tendering, through Conject or in some offline process, is in accordance with the Construction Partnering Framework Governance and Operating Guide and in particular

- Section 3.6 - Open Book Accounting and Value for Money
- Section 4.7 - Financial Compliance

1. Introduction

The Tender Management System controls and monitors the process of issuing tenders and submitting bids within a project.

The Process forms used in the Tendering system are designed to match the requirements of the project. The examples shown in this document reflect a typical Tendering configuration but your implementation may be slightly different.

1.1. Summary of the Tendering Work Flow

- **The Tender Manager** issues a Tender to prospective bidders, associating and attaching supporting documentation
- **The Bidders** receive the invitation to Tender on their Online Tendering interface screen where they Acknowledge the Tender and raise any Tender Queries
- The Tender Manager responds to the Queries and may issue Addendums
- The Bidders submit a Tender Bid

Note:

Tender Managers are those users who issue **Tenders** and associated information to **Tender Users**. They also respond to any **Tender Queries** as necessary and deal with returned bids.

Tender Users (The Bidders) are those who are invited to bid on issued Tenders. Their site access should be restricted and their account set up so that they are automatically taken to the Tendering Tab when they login to the site.

1.2. The Tender Forms

Tendering uses process forms to manage the flow of information between Tender Managers and Tender Users. These are the four processes used:

- **Tender** – the main Tender process is published by the Tender Manager to the Tender User (bidder). Attached and associated documents are often included giving the Tender User all the information required to submit their bid. Tender Users submit their bids by responding to the Tender form.
- **Tender Acknowledgement** - this process form is published by the Tender User to the Tender Manager. It is how the bidders indicate whether they intend to submit a bid for the Tender. It is raised from within the Tender process.
- **Tender Query** - this process is published by the Tender User to the Tender Manager. It is used to query any of the information included in the Tender process. It is raised from within the Tender process.
- **Tender Addendum** - this process is published by the Tender Manager to the Tender User. It is used to add additional information to the original Tender. For example, if a number of Tender Users raise the same query, details of the answer may be published to all Tender Users as a Tender Addendum. It is raised from within the Tender process.

- **Post Tender** - this process includes all post tender activity, including evaluation, negotiations, clarifications, tender reports etc. All this information should be uploaded to Conject and associated with the relevant tenders.

2. Setting up tender process

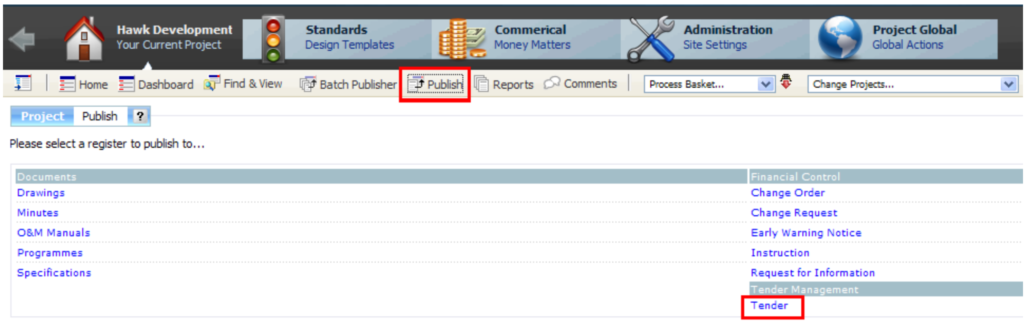
It is advised that each contractor has new user account specifically for tendering, this will become the Tender Manager account. As the tender processes are secure then only the user account that sent the tender has full access to the details and tender returns. Your PIC can arrange this for you and ensure that appropriate rights are assigned.

If you do opt for a single Tender Manager account then please do not provide the Tender Manager log in details to anyone outside of your own company as accessibility is recorded on an auditable report and it will be difficult audit. If the Clients PM team require access then adoptions should be set up by your company PIC. These will show as individual records on reports which can be referred to upon the opening of tenders.

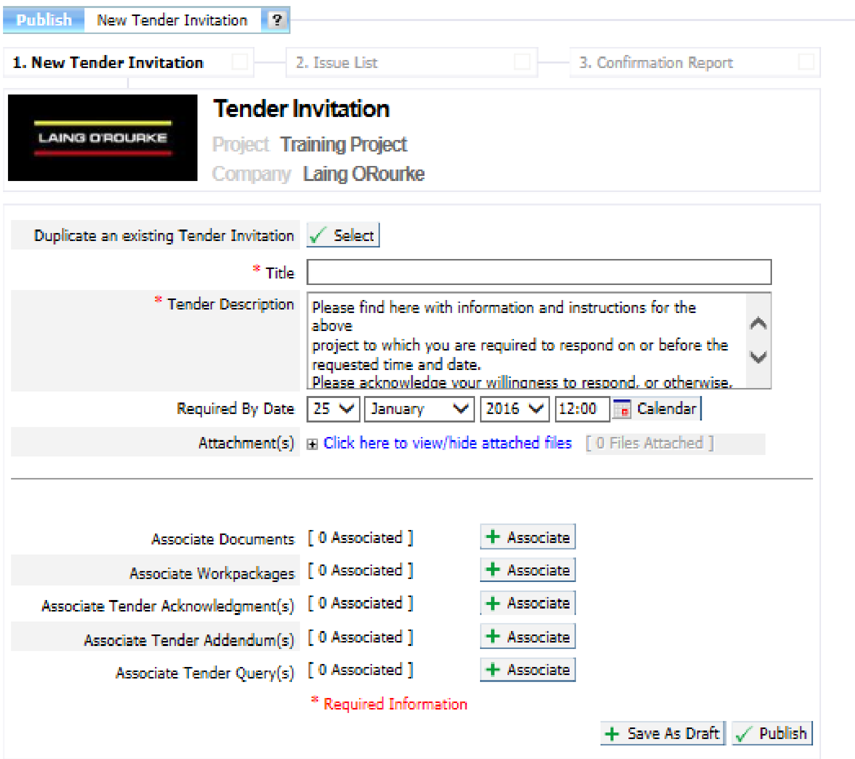
Please advise of any adoptions required at the start of the tender period.

3. Publishing a Tender

Click on the Publish button in the project toolbar and select the name of your Tender process, for example:



The Tender form is displayed for your input. All tenders are closed which means that bid responses cannot be viewed until after the “Required by” date and time has passed. This is an example of a typical Tender publishing form:



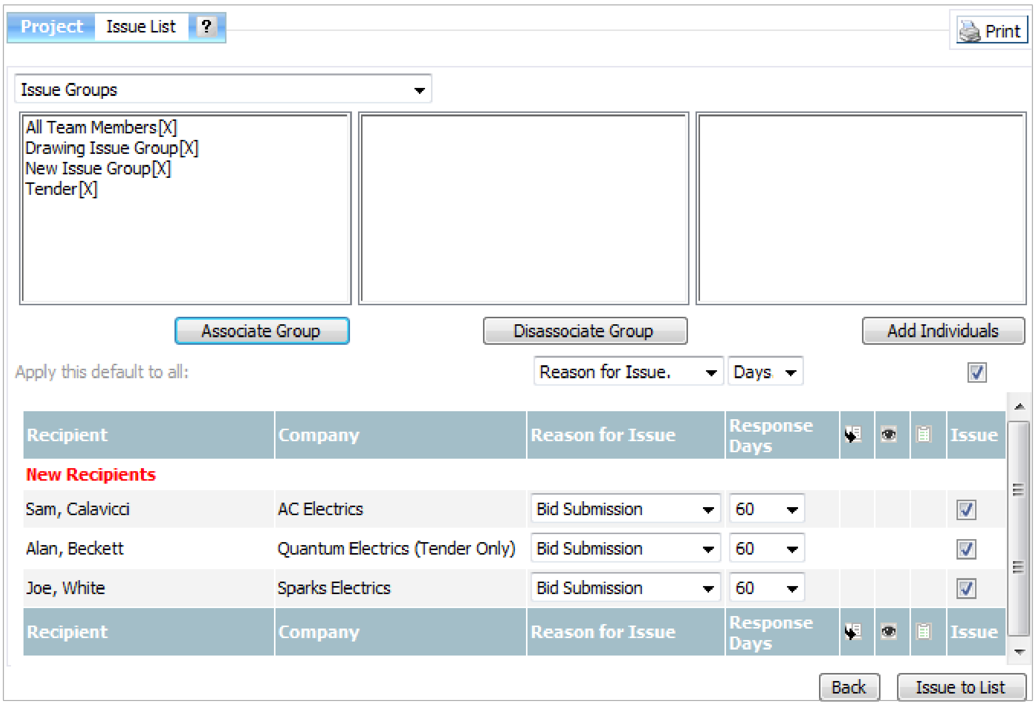
In addition to the standard Tender Reference, Title and Description fields which are mandatory (*), there are other fields and options that are usually included on a Tender form:

- **Required by Date** - this field always appears on a Tender process. It is used to specify the date and time by which bids must be submitted.
- **Attachments** - use this option to attach supporting documentation that is not published to the project separately.

- **Associate Documents** – use this option to associate relevant documentation that is already published to the project.

Click ✓ Publish to display the Issue List screen.

When the Issue List screen is displayed, make sure the list of recipients is correct and select the names of any additional recipients by either selecting one or more Issue Groups or by selecting individual users from the Tender Companies, for example:



Check the **Reason for Issue** and **Response Days** are correct for all recipients.

Typically, a Tender process is setup so that the default reason for issue is **Bid Submission** and the **Response Days** synchronise to the "required by" date entered on the publishing form. If you wish to issue a tender to PM/CR please add them to the issue list and amend their reason for issue to **For Information** however ensure that the other reason for issue boxes for the tenderers remain as **Bid Submission**

Click Issue to List to see the confirmation report showing the details of the Tender process and the names of the people to whom you have published it.

4. Tender Acknowledgements

Tender Acknowledgements are issued to you for Information and are displayed in your Project Summary or Inbox in the same way as any other process, for example:

	your actions	for your info	all
Tender		2	2
Tender Acknowledgement		1	1

In this example you can see that there is 1 Tender Acknowledgement that requires your attention.

Click on the number 1 link to view the list of Tender Acknowledgements sent for your Information – in this example only one item will be listed.

From the listing, open the Acknowledgement by clicking on a link in the listing, for example the Contents or the Reason for Issue, to view the details, for example:

Tender Acknowledgement

Project Portal Demo Project — System Reference TAc-00002

Company Quantum Electrics (Tender Only) — User Reference ZZ99-1000-1-GG-TMZ

Show / Hide Details

Raised By Beckett, Alan Company Quantum Electrics (Tender Only)

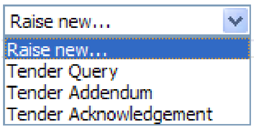
Tender Acknowledgement	**yes - we do intend to bid**
Created On	16/08/2010 15:42:29
Active/Inactive	Active
Associated	1 PD Tender
Do You Intend To Submit A Bid?	Yes

No further action is required of you on this Tender Acknowledgement.

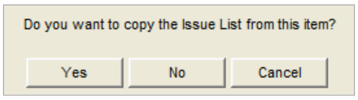
5. Publishing a Tender Addendum

A Tender Addendum is created from within the Tender process to which it relates.

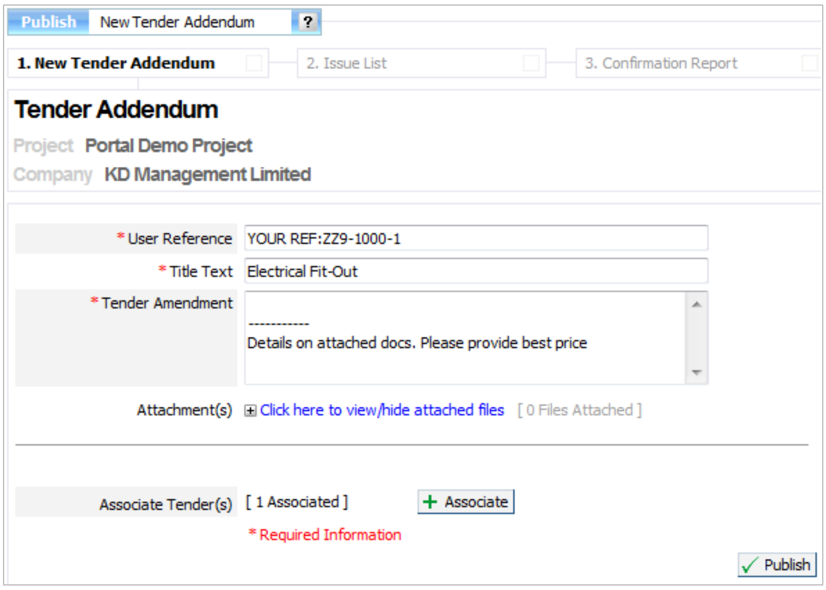
Find and open the Tender and from the **Raise New...** dropdown menu at the top of the screen, select Tender Addendum:



Before the new Addendum form opens, you are asked if you want to copy the issue list. Click on Yes to ensure that the Addendum is issued to everyone who received the original Tender:



This is an example of an Addendum form



Some of the details of the original Tender are automatically entered into this form. Finish by completing the details and adding any attachments that might be required.

The original Tender is automatically associated to the Tender Addendum. Click Publish to move to the Issue List screen which automatically displays the names of the users who received the original Tender.

The issue list should not be edited. Click on Issue to List to publish the Tender Addendum.

The publishing confirmation screen is displayed.

6. Tender Queries

Tender Queries are published by bidders and are issued to you, the Tender Manager, for your **Response**. They are displayed in your Project Summary or Inbox in the same way as any other process, for example:

	your actions		for your info	all
Tender Addendum			-	4
Tender Query	6	1	-	4

In this example you can see that there is 1 Tender Query that requires your action within the next 6 days.

Click on the number 1 link to view the list of Queries for your Action – in this example only one item will be listed.

From the listing, open the Query by clicking on a link in the results table, such as the Contents or the Reason for Issue link.

The details of the Query are displayed and you can review any attached documents.

To answer the Query click on Respond, enter your response and click on Publish

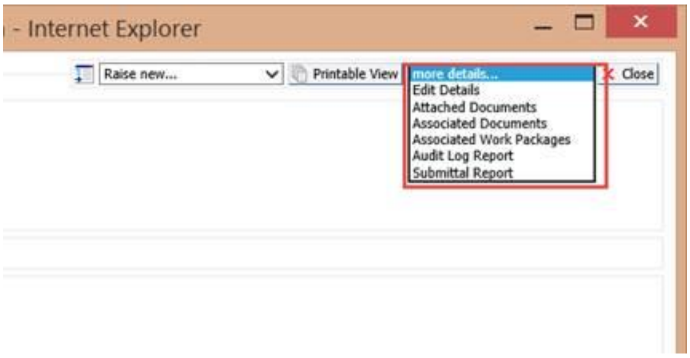
The Tender Query response should only be sent to the user who raised the Query. The Tender Query process is configured to force the distribution to this user so instead of seeing the Issue List screen next, you should see the publishing confirmation report showing that your Response has been published to the Tender User who raised the query.

As the response is only sent to the user who raised the query it is advised that a Tender Query Schedule is kept with all queries and responses and then issued as an addendum to all tenderers.

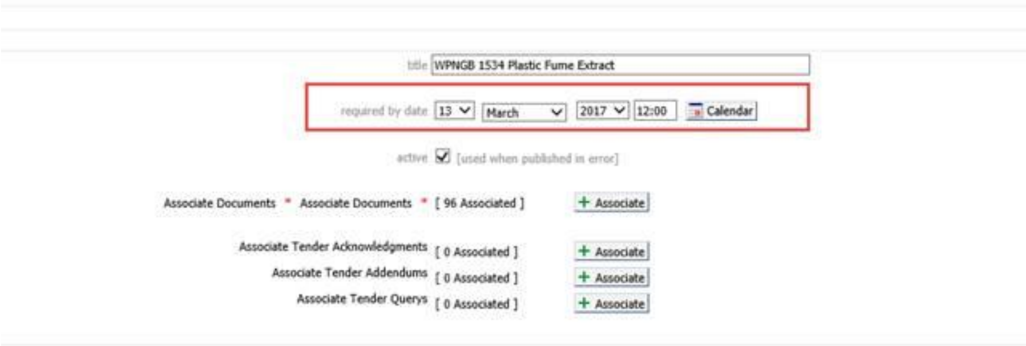
6.1. Extension of time

To grant an extension on a tender please follow the steps below:

1. Open the tender invitation that you want to extend
2. Click 'More Details' in top right corner of the tender invitation and select edit details from the drop down.



3. Extend the due by date by at least 1 day and set the expiry time, then click modify



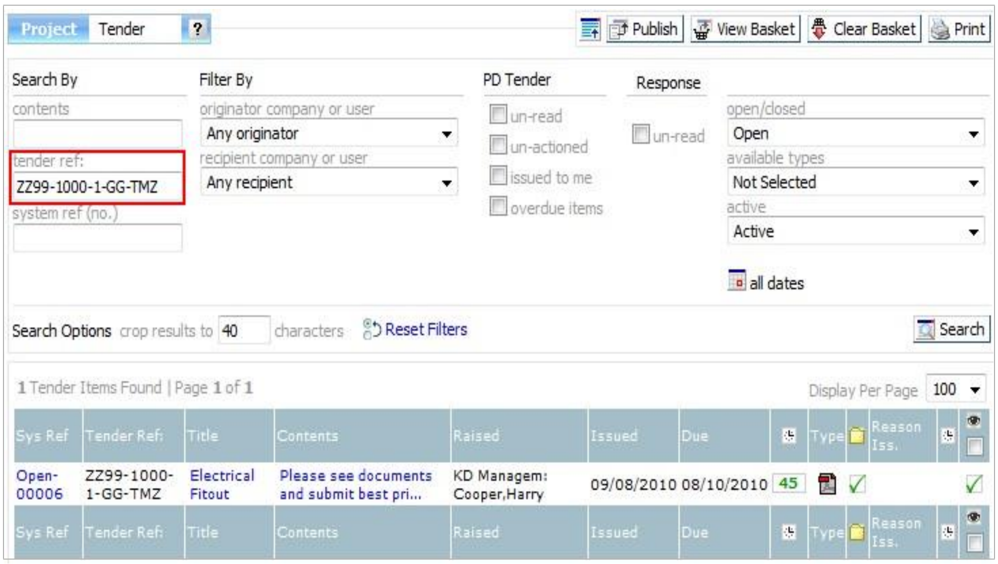
4. Then click Edit & Forward to send a notification out to all bidders and to add new bidders if required.

6.2. Submitted Tender Bids

Tender Bids are published as responses to the original Tender. They are issued to you for Information, and are displayed in your Project Summary or Inbox. They can only be viewed from within the original Tender.

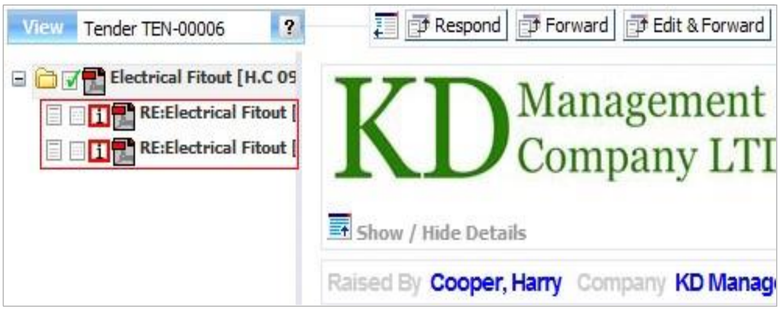
The Tender Management system has been configured to only allow Closed Tenders. The system will not allow you to view responses until the "Required by Date and Time" has passed.

To view the bids on a Tender, search for the Tender using the System Reference, Title, or any other details, for example:

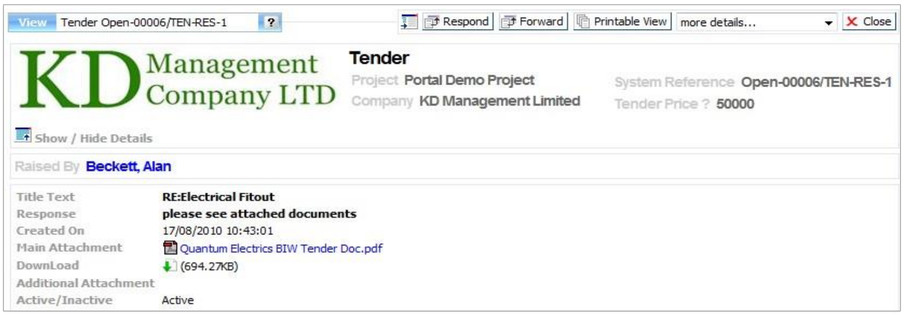


Click on a link in the listing, such as the Sys Ref or Title, to open the Tender.

The Tender opens in a new window and the Bids are displayed in the left side panel as responses to the main Tender. In this following example, there are 2 bids (responses):



Click on a bid to view the details in the main part of the screen and open and/or download any attachments:



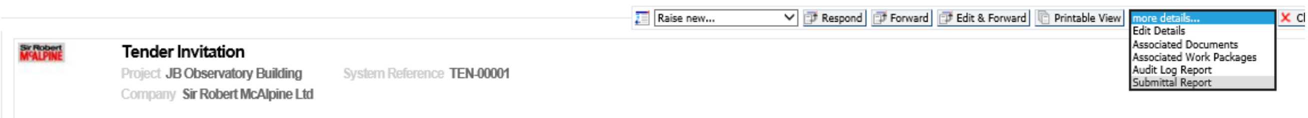
7. Reporting

Please note that only the user account that sent the tender is able to view the full reporting information.

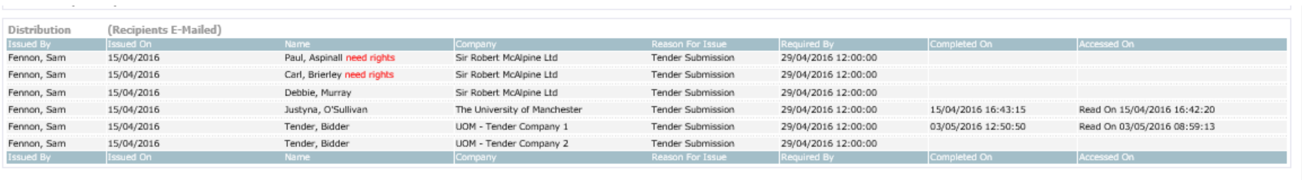
During the Tender process there are a number of reports that can be done to ascertain who has accessed the tender, who has submitted a return and who is late to return.

The first report is done from inside the individual tender and this can be used to determine who has accessed the tender online.

To do this open the tender you wish to check and in the top right hand corner there is a drop down box. Here you can click submittal report.



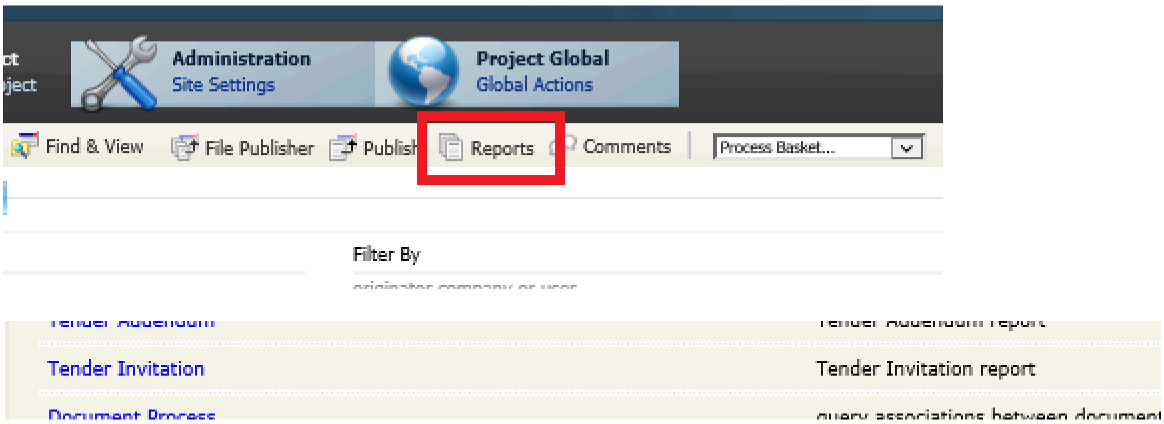
After clicking this, scroll down the page to view the report. This will show you who has accessed the tender, the reason it was issued to them and if they have been given the correct rights to view.



Distribution (Recipients E-Mailed)

Issued By	Issued On	Name	Company	Reason For Issue	Required By	Completed On	Accessed On
Fennon, Sam	15/04/2016	Paul, Aspinall need rights	Sir Robert McAlpine Ltd	Tender Submission	29/04/2016 12:00:00		
Fennon, Sam	15/04/2016	Carl, Brierley need rights	Sir Robert McAlpine Ltd	Tender Submission	29/04/2016 12:00:00		
Fennon, Sam	15/04/2016	Debbie, Murray	Sir Robert McAlpine Ltd	Tender Submission	29/04/2016 12:00:00		
Fennon, Sam	15/04/2016	Justyna, O'Sullivan	The University of Manchester	Tender Submission	29/04/2016 12:00:00	15/04/2016 16:43:15	Read On 15/04/2016 16:42:20
Fennon, Sam	15/04/2016	Tender, Bidder	UOM - Tender Company 1	Tender Submission	29/04/2016 12:00:00	03/05/2016 12:50:50	Read On 03/05/2016 08:59:13
Fennon, Sam	15/04/2016	Tender, Bidder	UOM - Tender Company 2	Tender Submission	29/04/2016 12:00:00		
Issued By	Issued On	Name	Company	Reason For Issue	Required By	Completed On	Accessed On

In addition to this you can run a full report.



If you wish you can add certain criteria to your report by filling in the boxes. If you want a full report you can leave these blank, and just click search.

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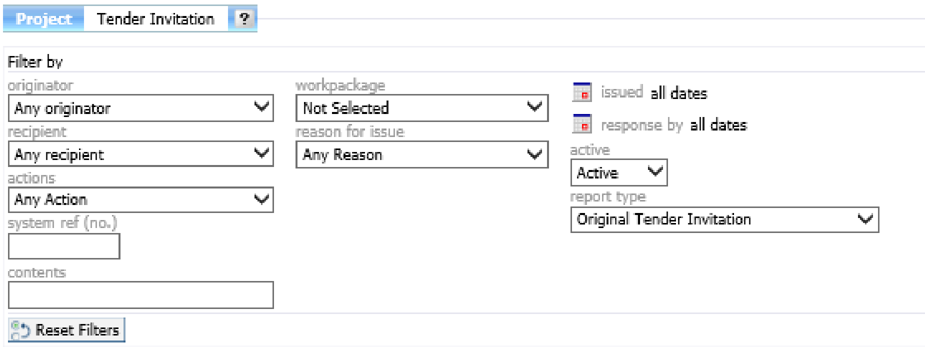


The report will then be generated and if required it can be exported to excel. It provides a detailed over view of the tenders submitted and allows you to chase up tenderers who are yet to submit. This can be done by clicking the mail icon.

Display Per Page 100

Recipient		Due	Reason	Message	Completed
Powell, Mark	-18	19/08/2016 12:00:00	Tender Submission	incomplete	
Wood, Andrew	-55	13/07/2016 12:00:00	Tender Submission	incomplete	
Training2, Admin	-126	03/05/2016 12:00:00	Tender Submission	incomplete	
Training, Admin	-126	03/05/2016 12:00:00	Tender Submission	incomplete	
Brierley, Carl	-130	29/04/2016 12:00:00	Tender Submission	incomplete	
Murray, Debbie	-130	29/04/2016 12:00:00	Tender Submission	incomplete	
Bidder, Tender	-130	29/04/2016 12:00:00	Tender Submission	incomplete	
O'Sullivan, Justyna		29/04/2016 12:00:00	Tender Submission	on time	15/04/2016[test]
Bidder, Tender		29/04/2016 12:00:00	Tender Submission	late	03/05/2016[chrome tri]
Aspinall, Paul	-130	29/04/2016 12:00:00	Tender Submission	incomplete	
Hines, Stephen	-130	29/04/2016 12:00:00	Tender Submission	incomplete	
Wade, Geoff		29/04/2016 12:00:00	Tender Submission	on time	15/04/2016[GEOFF RESP]
Wade, Geoff		29/04/2016 12:00:00	Tender Submission	on time	15/04/2016[GEOFF TEST]
Wade, Geoff		29/04/2016 12:00:00	Tender Submission	on time	15/04/2016[GEOFF TEST]
Wade, Geoff		29/04/2016 12:00:00	Tender Submission	on time	15/04/2016[GEOFF RESP]
Fennon, Sam	-133	26/04/2016 12:00:00	Tender Submission	incomplete	
Kirwan, Michael	-182	08/03/2016 12:00:00	Tender Submission	incomplete	
Fennon, Samantha	-182	08/03/2016 12:00:00	Tender Submission	incomplete	
Butler, Amy	-214	05/02/2016 15:00:00	Tender Submission	incomplete	
Fennon, Sam		19/04/2016	Information	on time	19/04/2016

8. Uploading Post Tender Documentation

In order to complete the tender process, all post tender documentation should be uploaded to Conject and then associated with the tender. This will ensure that all tender information is stored in the same place and is a requirement of the Framework for auditing purposes.

8.1. Organising the documents

To do this, first you will need to create a single .zip file containing all of your post tender documentation which may include the following;

- Evaluation sheets
- Clarifications
- Tender reports
- Notification letters*
- Correspondence

*Notification letters should be emailed to the relevant contacts; evidence of this must be saved within the post tender documentation uploaded to Conject.

The .zip file should be titled "Post Tender Documentation – (Tender ref no)"

In order to upload the post tender documentation and associate with the relevant tender, a .pdf file must be created to accompany it. The PDF document should include any pertinent details on the tender including but not limited to the following;

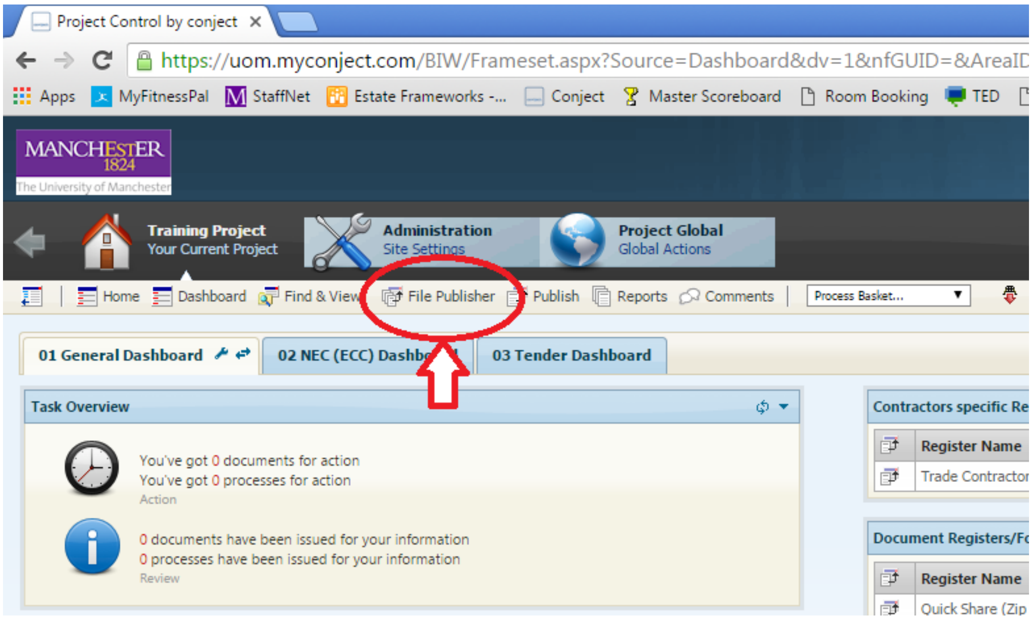
- Which tender it relates to
- What is included within the .zip file
- Any further relevant information

The .pdf title should be the tender reference number, e.g. "TEN-00001.pdf".

8.2. Uploading the documents

Once the documents have been organised as above, they can then be uploaded to Conject.

First navigate to the "File Publisher" as showed below:

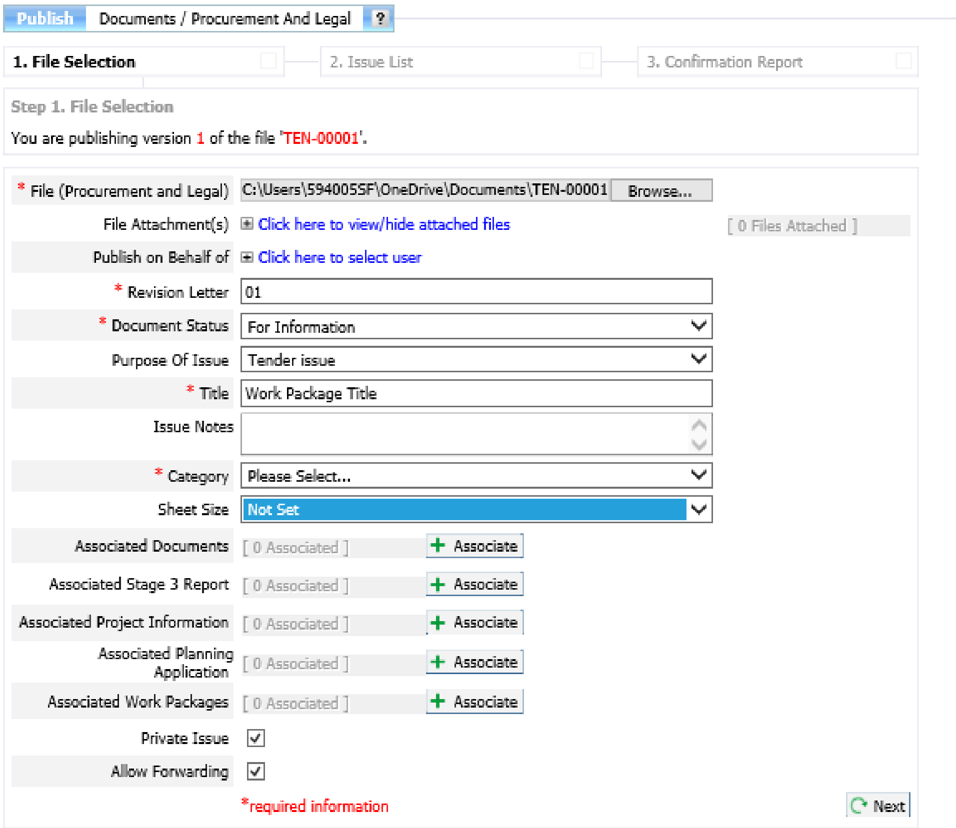


All post tender documentation should be uploaded to the "Procurement and Legal" Section:

The documentation should be uploaded as below:

- The "File" to be uploaded is the .pdf file created
- The "File Attachment(s)" should be the .zip file created
- Document Status = "For Information"
- Title = specific work package title for that tender
- Category = "Appointments and contract"

The rest can be left as default, please see below screenshot.



8.3. Associating the documents

Once uploaded, please inform your Project Information Coordinator (PIC) so they can associate with the relevant Tender.

For More Information on Conject and its general operation please consult The University of Manchester Project Collaboration Tool Protocol Document & Quick Start User Guide.