SA TENDERS AND CONTRACTS
COUNCIL ADMINISTRATOR USER GUIDE

Business Systems
Shared Services SA
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Department of Treasury and Finance

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INTRODUCTION

This user guide is intended as an introduction to agency administrators and clerks who will use the system to create and manage tenders, contracts and the tender process.

AGENCY INFORMATION

Overview

Many of the advanced features of SA Tenders and Contracts are only available to registered users. This section covers the registration process and related activities such as logging in and lost password retrieval.

This section also covers the management of Agency information and personal information. Also covered are special extensions of the management functions as they pertain to agencies.

1. Agency Administrator Role

The Agency Administrator will be required to perform the following duties for all tenders issued by the agency:

- Add all of the agency's new tenders to the site prior to the advertisement of the tender in the newspaper press (i.e. the Wednesday preceding an advertisement in Saturday's edition of *The Weekend Australian* and Monday's edition of *The Advertiser*).

- Make modifications to tenders already advertised on the site as necessary.

- Make modifications to their agency details, login profile as required (e.g. when new administrative users are created).

- Record and distribute statistics of tender document downloads from the site.

- Manage tender responses including; downloading, decrypting, saving, storage and dissemination.

- Liaise with media provider for the advertisement of tenders in the paper.

1.1 Agency Administrator Requirements

In preparation for implementation of these procedures, the Agency Administrator must have:

- An appropriate **Username** and **Password** to access the agency tender administration area. Access can **_only_** be arranged through the System Administrator.

- An internet-enabled device, such as a PC workstation with Google Chrome or Mozilla Firefox installed.

- This site is best viewed in screen resolutions higher than 1366 x 768.

- Each agency administrator must have access to a secure administration area that is used to maintain the data on the site.

- Your **Username** and **Password** for this site must be kept confidential.

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MINIMUM SYSTEM REQUIREMENTS

This section of the user guide outlines the minimum system requirements for using the SA Tenders and Contracts website.

This module covers the following:

- Minimum System Requirements
- Supported Web Browsers
- Web Browser Settings

It is therefore a useful starting point for any user of the website.

ACCESSING TENDERS AND CONTRACTS

2.   Home Page Details

SA Tenders and Contracts (www.tenders.sa.gov.au) is the central source for public procurement opportunities within South Australia. The site provides easy-to-use Internet access to all publicly available bidding opportunities with a facility to submit electronic responses using the Electronic Lodgement Service (ELS). The site also provides details of South Australian Government awarded contracts for goods, services and works.

3.   Minimum System Requirements

You need the following:

- An internet-enabled device, such as Personal Computer
- A broadband internet connection
- One of the following Internet Browsers:

	Google Chrome – Current version and 2 versions prior Click here to download Google Chrome
	Mozilla Firefox – Current version and 2 versions prior Click here to download Firefox
	Microsoft Edge (Chromium) – Current version and 2 versions prior
	Safari – Current version and 2 versions prior

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	Microsoft Internet Explorer – Version 11

4. Web Browser Settings

The use of a current browser is recommended, as earlier versions may be limited to view only capability, leaving you unable to upload tender responses. The site uses cookies to keep track of users. If you do not have cookies enabled, you will have to re-enter your password every time you download a tender or submit a tender response.

The recommended settings are as below:

Setting	Requirement	Notes
JavaScript	Enabled	Update this in your browser settings.
Cookies	Enabled	Update this in your browser settings.
Internet speed	Download >= 12Mbps Upload >= 1Mbps	Slow internet speeds may result in services running slowly or timing out.
Ad-blocker software Anti-virus software Browser add-ons	You may need to adjust the settings of your software or browser add-ons to allow our online services to load correctly.	This may involve whitelisting or adding an exception for the ***.tenders.sa.gov.au** and ***.consolidatedtenders.com** domains.
Network settings (for example, firewalls)	Ensure the ***.tenders.sa.gov.au** and ***.consolidatedtenders.com** domains are not blocked.	If you don't have access to update these settings (for example, you're using a public computer or wi-fi network), try a different device or a different network.

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5. Access SA Tenders and Contracts

Complete the following steps:

- Open **Google Chrome** or your preferred web browser from your desktop.

- Type the address of the site (www.tenders.sa.gov.au) in the Address line of the browser.
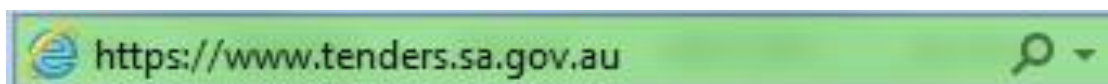
- The **Welcome to SA Tenders and Contracts** page appears:
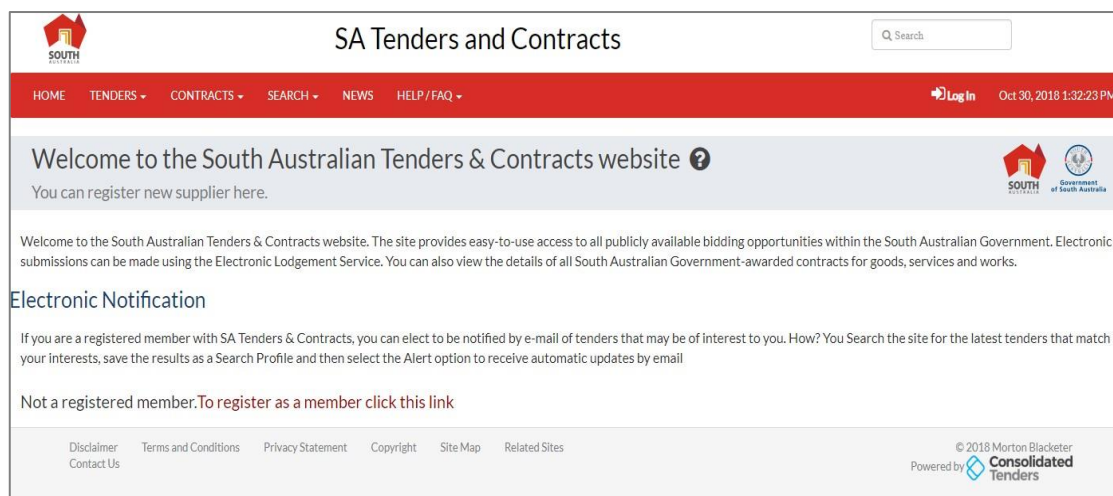
To log in, you must enter your **Username** and **Password** that is recognised by the system.

6. Registration

Registration for Agencies is different to registration for suppliers. Suppliers can self- register from the website. However, the System Administrator must register agencies.

There are two possible means of registering an Agency:

- The first is as a top-level agency. A top-level agency can best be thought of as a department, or agency, within the government context.

- A department or agency can then have business units within it. In SA Tenders and Contracts, we use the generic 'agency' to refer to any tender issuing authority. Agencies are then registered on a hierarchy basis, which dictates certain privileges.

The other way to register an agency is as a sub-agency of an existing agency. An agency administrator has rights to create sub-agencies (or business units) within the existing agency. The creation of sub-agencies will be covered later in this user guide. In the interim though, refer to the figure below. This is the registration screen for sub-agencies.

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As with suppliers, this is a basic screen required to capture the bare minimum of information required to register an Agency. Once created, more powerful management features are available.

7. Logging In

To get the most out of the SA Tenders and Contracts website, you need to be a registered user. To log in, you must enter your **Username** and **Password** that is recognised by the system.

For training purposes, your trainer will provide you with a **Username** and **Password**.

7.1 Log In to SA Tenders and Contracts

To log in to the website:

• Select the **Log** in button located on the top right hand side of the Home Page:

• On the **Buyer Login** tab, fill in both your **Username** and **Password**.

• Click the **Sign In** button.

7.2 Terms and Conditions

The use of the SA Tenders and Contracts website is governed by the Terms and Conditions, which when accepted constitutes an agreement between the person who wants to use the SA Tenders and Contracts website and the South Australian Government (including its agents, employees and subcontractors).

In order to use the SA Tenders and Contracts Website:

- Before registering, you must read the Terms and Conditions;

- To continue with registration process, **Agree** or **Disagree** to the Terms and Conditions.

- If you **Decline**, you will return to the Home Page.

- If you do not agree to the Terms and Conditions, you should not use the SA Tenders and Contracts website.

- If you accept the Terms and Conditions, you will go to the **Register New Supplier** page.

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7.3   Changing Password

The **Changing Password** page is automatically populated. Complete the following:

- In the **Current Password** field, enter the current password used to log on.

- In the **Change Password** field, enter a new password. Ensure the password has a minimum of 6 characters with at least one uppercase letter, lowercase letter, number and symbol (such as %, $, #, etc.).

- Click **Save Changes** button.

The **Change Password** page is displayed to confirm the password has been successfully changed. It also states that the new password will not be emailed.

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7.4 Retrieve Password

If you have forgotten your password, you can retrieve it yourself by just clicking on the **Forgotten Password** link (located on the **Log In** page, just above the sign in button).

- Enter your Email address.

- Click **Reset Password**.

- Your Username together with a link to reset your Password will be e-mailed to you. Note this link is only valid for 4 hours from the time of creation of the email

> If the email entered is used for more than one account, the page will prompt you to enter the username of the account before resetting the password.

8.   SA Tenders and Contracts Home Page

The Home page is the initial entry point for all users. The Home page provides the entry points into sections of the site. The home page and all subsequent pages (except popup windows) retain the same basic layout, with a consistent navigation section, header and footer.

The Home page links can be divided into personal functions, role based functions and into independent services.

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9.   Navigation of Site

Once logged into the SA Tenders and Contracts site, located on the left hand menu bar of the Home page are the Main Menu buttons, which allow you to navigate the site.

HOME	This website contains specific details about tendering opportunities for the Public Sector within SA. Tender opportunities are listed under the stages of proposed, current, pending award and awarded.
Current	Lists opportunities that are currently seeking responses. In this list, you will find summary information on opportunities and where available, links to supporting web pages giving more details.
E-Lodegement	The secure ELS allows suppliers to submit tender responses in a secure electronic environment.
Future	Lists opportunities that will soon be opening and seeking responses.
Closed	Lists opportunities that have recently closed, the responses received are being evaluated.
New This Week	Lists tenders newly created this week
CONTRACTS ▾	Lists opportunities where all responses have been evaluated and the successful contractor(s) selected. Information about the winning contractor(s) is displayed as required under the guidelines for disclosure.
SEARCH ▾	This is where you can search for an opportunity using a keyword, and/or a category and a status.
ADMINISTRATION	This is the administration page where all tender management and system management activities are performed. It is only accessible to Agency Administrators and Agency Clerks.

9.1   Personal Functions

Located on the left hand menu bar of the Home page are several additional links, which allow you to logout, edit personal details, and edit your business details.

NEWS	News and Publications is an access point for suppliers and other Government Agencies to news, publications and policies of the SA Government, State Supply Board and other relevant government purchasing information.
HELP / FAQ ▾	Here you will find general information about the site, together with questions and answers to some common enquiries.
Request Support	You can request support or provide feedback on the service. Support requests will be routed to the System Administrator, who may forward them on to others for resolution.

Document Library	The library is an access point to documents, policies, user guides and further information on relevant issues relating to SA Tenders and Contracts.
Logout	Log out of the SA Tenders and Contracts website.
Edit My Details	This option will take you to a page where you can change your registration details and manage your personal information, such as your username and password.
Edit My Business	This option will take you to a page where you can change details of your business registered with SA Tenders and Contracts. Depending on your business, you may have multiple offices, and choose to enter the details of these offices using this feature.
Edit My Subscriptions	This option will take you to a page where you can update what tenders and saved tender searches you will receive notifications from.

9.2   Additional Links

On the menu bar at the bottom of the Home page, there are several additional links which provide useful information: how to contact us, other related websites, our terms of use policy, and

Disclaimer	This page describes the source of the data and includes disclaimers relating to its origins and other disclaimers relating to links to external sites.
Terms and Conditions	This page explains the conditions under which the data on this site can be used.
Privacy Statement	The South Australian Tenders and Contracts Website is operated in compliance with the South Australian Government's Information Privacy Principles.
Copyright	The South Australian Government's Tenders and Contracts Website Copyright details are outlined on this page.
Site Map	This page gives links to all the key pages throughout the site
Related Sites	Clicking this option will take you to a listing of other related websites.
Contact Us	This page gives information (such as address, phone, email) to get in contact with SA Tenders and Contracts.

10. Edit My Details

This option will take you to a page where you can change your details and manage your personal information, such as your **username** and **password**.

10.1 Personal Information

This section is used to manage and update your personal information:

First Name and Last Name	Used for reference purposes and in correspondence by post and email.
Position	The title is a useful reference when trying to identify the appropriate person at your business.
Allow Login	Determines whether user can log in or not (you cannot turn this function on and off for yourself)
Username	The name you enter the first time you register with the site.
Change password and Confirm password	You can update your password at any time.
Email	Allows you to both edit your current email address and also add more (you can have more than one email address).
Phone	Allows you to add and edit the phone numbers connected to your account.

Manage Business	Allows you to select the business you are allowed to manage apart from your own. As an Agency Administrator, you may be granted the right to log in under a different agency; if you have a requirement to create and manage tenders for other agencies. An Agency Administrator can login or remove businesses from the managed business list. The right to log in under a different agency to create and manage tenders for the other agency is given to individual Agency Administrators and not to the Agency. This right can only be provided to the Agency Administrator through the SA Tenders and Contracts System Administrator.

Select the **Save Changes** button at the bottom of the page.

This will now commit the changes to your account (otherwise your changes will be discarded).

10.2 Email Addresses

SA Tenders and Contracts can store multiple email addresses against your user account. Emails are used to inform you of the release of new tenders, updates to tenders, confirmations of tender submissions, and other important information. SA Tenders and Contracts will send the email to all the addresses entered against your name.

10.3 Multiple Email Addresses

Although you are only required to specify one email address, you are encouraged to enter multiple email addresses for the following reasons:

- Improved likelihood of receiving emails as soon as possible. Using more than one address ensures that you will receive the email if one of the services is temporarily unavailable.

- Shared, group email addresses so that when an email is sent to you, it is also sent to the group. This ensures that if you are unexpectedly away from the office, others in the group will receive the email.

10.4 Adding Another Email Address

To add an email address to your personal account:

- Click the **+ Add Email** button.

- Enter your email address in the window.

- Select the **Save Changes** button at the bottom of the page.

This will now commit the changes to your account. Otherwise, your changes will be discarded.

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10.5 Removing an Email Address

Click the **Delete this Email Address** button 🗑 (the trash can) next to the email address that you wish to remove.

10.6 Modifying an Email Address

To modify an email address:

- Click inside the text box of the email you wish to modify and enter in the desired email
- Select the **Save Changes** button at the bottom of the page.

This will now commit the changes to your account. Otherwise, your changes will be discarded.

> ℹ When using the **Add**, **Modify** or **Remove** functions, you must click the **Save Changes** button at the bottom of the page once you are finished in order to commit these changes to your account. Changes will otherwise be discarded.

10.7 Phone Numbers

SA Tenders and Contracts can store multiple phone numbers against your user account. SA Tenders and Contracts support staff may use the phone numbers provided to contact you when resolving support requests or problems relating to tenders.

Phone Numbers ❓

＋Add Phone

| PHONE ▼ | 61 | 08 | 1233321 |

You are encouraged in providing both an office and mobile number so that you can be contacted when necessary.

10.8 Adding a Phone Number

To add a phone number to your personal account, simply:

- Click the **+ Add Phone** button.
- Enter your phone number in the space provided.
- Select the **Save Changes** button at the bottom of the page.
- If the details have been successfully modified, the **Person Information Modified** confirmation screen appears.
- Click on the **Continue** button to return to the Home page.

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10.9 Removing a Phone Number

Click the **Delete this Phone Number** button 🗑 (the trash can) next to the phone number that you wish to remove.

10.10 Modifying a Phone Number

To modify a phone number:

- Click inside the text box of the phone number you wish to modify and enter in the desired phone number.

- Select the **Save Changes** button at the bottom of the page.
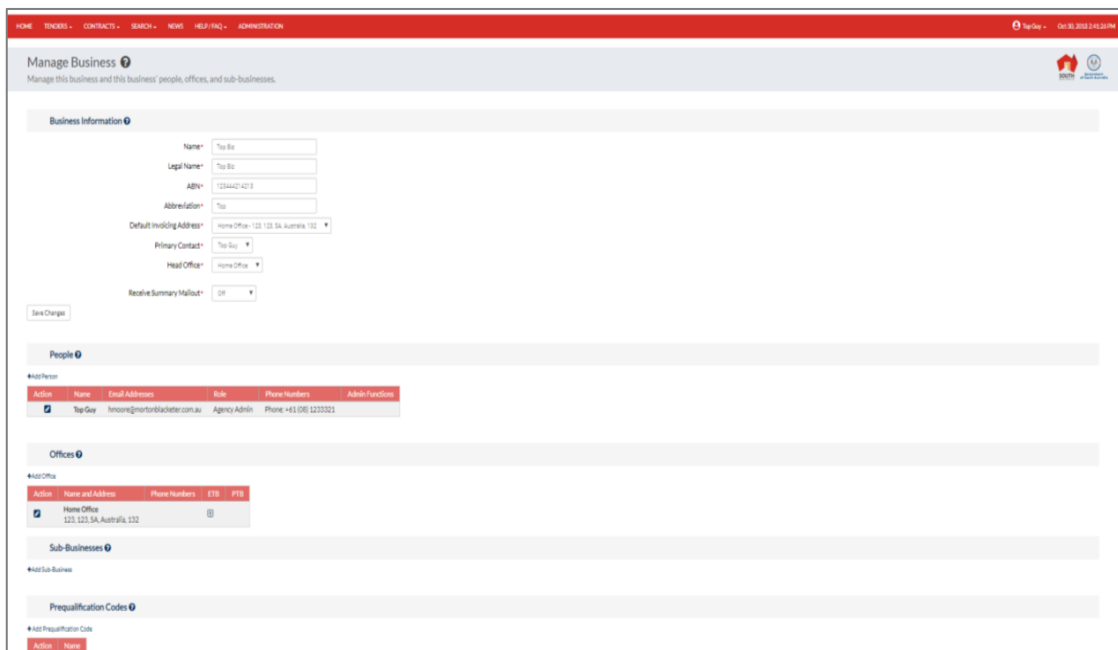
This will now commit the changes to your account. Otherwise, your changes will be discarded.

11. Edit My Business

Although users interact with the SA Tenders and Contracts system, users are deemed to act on behalf of an agency. Agency membership is used throughout the site, in the provision of services. It is therefore important that all users within your agency are reflected as members of your agency on this page, as opposed to re-registering each user, using the same agency name.

For detailed help on the various sections of this page, click on the detailed help icons in each section.

The Agency Management console issued to modify an agency profile, create an electronic tender box (ETB), and register details of the physical tender box and change agency passwords.

12. Business Information Section

Name and Abbreviation	This is used for reference purposes and for tender listings. The abbreviation is used as a prefix for the system assigned tender code. For simplicity this abbreviation should match existing, well-known acronyms for the agency (for example DAIS, DHS).
Invoicing Address	This address is used for invoicing purposes for newspaper advertisements. The invoice address must be selected from the addresses belonging to offices of this agency that accept postal delivery.
Primary Contact	The agency administrator responsible for managing your agency's tenders is nominated as the primary contact and the contact details are used by the system.
Head Office	Every agency must have at least one physical office, one of which is the head office. Most agencies will only have one office. The head office details are used by the system and operators as a destination postal delivery and contact follow-ups in response to matters raised by SA Tenders and Contracts.

13. People Section

The SA Tenders and Contracts application requires that users be associated with an agency. The primary reason for this being that people, on behalf of agencies, transact tender activities. For example, when tender documents are issued and when responses are submitted, these activities are seen to be between the businesses themselves, rather than the people who performed them.

When creating tenders, contact people for the tender must be selected from the members of your agency who are registered with SA Tenders and Contracts. Registered users of the system must handle the issuing of tenders, as well as the receipt of tender responses. It is therefore necessary that all members of your agency who will be performing these activities be registered with SA Tenders and Contracts.

Various important activities such as downloading tender specifications are recorded against the user who is currently logged in. This is one of many reasons why it is considered security poor practice to have shared accounts that are used by a group of people. SA Tenders and Contracts supports the notion of multiple users with different roles belonging to the same agency and should be used as such.

13.1 Adding a Member

To register a new member of your agency as a new SA Tenders and Contracts user:

- Click on the **Add Person** link.
- Enter your **First Name**, **Last Name** and **Position**.
- Check the **Allow Login** box.

- Insert a **Username** the person will use to access the system.
- Select the person's role, choose either **Agency Administrator**, **Agency Contact** or **Agency Clerk**.
- Enter a valid **Email Address**.
- Enter the person's **Phone Number**.
- If required, select a business to manage from the drop down and then click **+ Add Business**.
- At the bottom of the page, click the **Save Changes** button.

13.2 Removing a Member

You will not be able to remove the person who is nominated as the primary contact for the agency. In order to remove this person, first appoint another primary contact and save these changes.

To remove a person:

- Click the **Delete this Person** button 🗑 (the trash can) next to the person you wish to remove.
- A window appears asking *'Are you sure you want to delete "…"?*

- Select **Delete**.
- The person is deleted from the system.

You would typically perform this activity when a person leaves your agency, or when their job function changes such that they no longer require access to SA Tenders and Contracts.

13.3 Modifying a Member's Details

Click on the **Details** button 📝 (the page icon) next to the person whose details you wish to modify. This will open up the personal details form for the selected user. Modify the details as required.

14. Offices Section

All agencies registered with SA Tenders and Contracts must have at least one physical office that accepts postal deliveries. Depending on your agency, you may have multiple offices, and choose to enter the details of these offices using this feature.

Offices correspond to the physical locations of:

- Tender boxes
- Electronic Tender Boxes
- Tender document collection points
- Briefing venues
- Locations for advertising invoicing.

Although most agencies are likely to have a single office, it is possible to have many. In addition to a physical address, each office may have a postal address. Offices are important locations from the perspective of interacting with suppliers.

14.1 Adding Office

To register a new office to your agency, click the **Add Office** link. This will open up the **Creating New Office** details form for the new office. Enter the details as directed by the help on this form.

14.1.1   General Details

Although most agencies are likely to have a single office, it is possible to have many. In addition to a physical address, each office may have a postal address.

Name	This Name should be the description name that is used and well known to other members of the agency. Where this office will be used for another purpose in a tender definition, ensure that the name is meaningful to the public, i.e. Walkerville Office.
Alternative Collection Details	The **Alternative Collection Details** field has been added to the **Offices** screen allowing free text comments to be added to the **Specifications** column. However, the site is designed to have documents available for download over the Internet and remains the preferred method for suppliers to obtain documents.
Has Physical Tender Box	Check the Has Physical Tender Box option if you intend to use this office for receiving of tender responses.

14.1.2   Phone Numbers

SA Tenders and Contracts can store multiple phone numbers for each office location. Phone numbers include fixed line, mobile and fax numbers

14.1.3   Addresses

An office in SA Tenders and Contracts corresponds to a physical office location and must have an address. Optionally, this physical address can receive postal mail. Agencies must have at least one office with a mailing address. This will usually be the head office. These office addresses are used for of correspondence, collection of tender specifications, briefing sessions and delivery of tender responses.

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14.2 Adding an Address

To add an address for your office:

- In the **Offices** section, simply select the **Add New Address** button and the **Edit/Add Address** screen will appear.

- Enter the **Address**, **City**, **State / Province**, **Country, Zip / Post Code** and select either **Postal Address** or **Physical Address** or both;

- Select the **Save** button.

- The new address will appear with the **Edit this Address** and Delete this Address icon. It will also display whether the address is a postal or physical address or both.

- Click the **Save Changes** button.

- If the new office has been successfully created, the **Office Updated** screen will display.

- Click the **Return** button.

This will now commit the changes to your account and will return you to the **Managing Business** screen for your business.

> **i** When using the **Add**, **Modify** or **Remove** functions, you must click the **Save Changes** button at the bottom of the page once you are finished in order to commit these changes to your account. Changes will otherwise be discarded.

14.3 Removing Offices

Click the **Remove** button (the trash can) next to the office that you wish to remove. Note that you will be prevented from removing the office that is selected as the head office. In order to remove this office, first select another office as the head office and save the changes.

Action	Name and Address	Phone Numbers	ETB	PTB
✏	Home Office 1 Big Street, Adelaide, SA, Australia, 5000	Office: +61 (08) 1233213321	⊞	
✏ 🗑	Second Office 1 Lane, Adelaide, SA, Australia, 5000	Office: +61 (08) 213	⊞	◈

+Add Office

14.4 Modifying an Office

Click the **Details** button (the page icon) next to the office that you wish to modify. This will open up the office details form for the selected office. Modify the details as required.

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15. Tender Boxes

In order to receive responses to a tender, the tender must be linked to an existing tender box. Tender boxes are bound to offices, since they are always located at an office of the issuing agency or at another agency. Each office can have a physical and electronic tender box (ETB).

Physical tender boxes in SA Tenders and Contracts correspond to the actual tender boxes where hardcopy responses are deposited. To create a physical tender box on the system, edit the details of an office and indicate that the office has a physical tender box.

Action	Name and Address	Phone Numbers	ETB	PTB
✏️	Home Office 1 Big Street, Adelaide, SA, Australia, 5000	Office: +61 (08) 1233213321	⊞	
✏️🗑️	Second Office 1 Lane, Adelaide, SA, Australia, 5000	Office: +61 (08) 213	⊞	📦

+Add Office

15.1 Electronic Tender Boxes

An electronic tender box (ETB) is necessary to receive electronic responses. An ETB is an encrypted repository on the server, where all responses for the specific tender are kept until downloaded.

The encryption process uses a private key and public key (PGP). The public key is stored on the server and used to encrypt responses. The private key is stored on the workstation that will be used to decrypt responses. The private key must remain on the tender download workstation. If lost, responses will not be accessible.

15.2 Creating an Electronic Tender Box (ETB)

Electronic tender boxes (ETB) are bound to offices and are created from the business management page. To create an ETB, click the ETB ⊞ icon. This will bring up the ETB creation page (below).

Click the **Generate and Download** button to initiate the key generation process.

Create Electronic Tender Box ❓

This page is used to create an electronic tender box. It must be performed from the PC where tender responses will be downloaded. Be sure to read the detailed help for more information.

By continuing, you will proceed to create an electronic tender box for: **Home Office**

Continue

The ETB creation process follows these steps:

- A private key / public key pair is created on the server,
- The public key is stored on the server,
- The private key is transferred to the workstation over a secure connection and stored on the local file system,

- The process is verified, a sample is encrypted at the server using the public key, then sent to the workstation and decrypted on the workstation by comparing the original sample on the server.

This test implements all the steps that would be required to download and decrypt tender responses.

15.3 Select Private Key Storage Location

By default, ETB private keys are stored in the SA Tenders folder in the **Downloads** folder (on a Windows PC). The actual location for the key is important because the key must be accessible by the user who will download tenders. If you have multiple users on the PC then you might consider placing the key in an area of shared access.
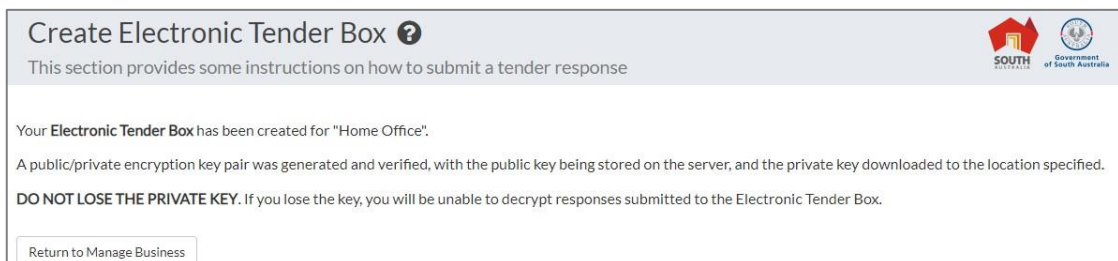
On Internet Explorer, to save an ETB key to your desired location:

- Click **Save as**.

- Select the folder where you want to store the private keys.
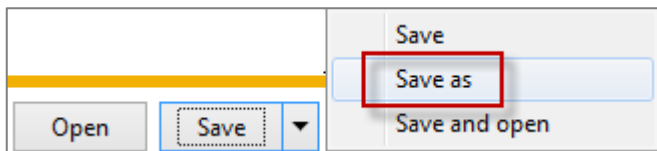
15.4 Create Electronic Tender Box Success

Once completed, you will be presented with a confirmation screen.

16. Sub-agencies Section

Agencies in SA Tender and Contracts can be organised hierarchically. In other words, it is possible to set up one or more agencies under an existing agency. For large agencies, it is useful to create sub-agencies (corresponding to specific business units) under that agency. Generally, one would only do this if those business units manage their own tenders.

Sub-agencies also inherit certain details of their (top level) parent. These details are the SA Government membership flag and the pre-qualification codes. When a sub-agency creates a tender, it can list the tender either under its own name, or under the name of its top-level parent.

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16.1 Adding a Sub-agency

To register a new sub-agency:

- Select the **Edit My Business** link from the menu.
- Under your agency, click the **Add Sub-agency** link.
- This will open up the agency creation form for the new sub-agency.
- Enter the details as directed by the help.

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16.2 Modifying a Sub-agency

Click the **Details** button ✎ (the page icon) next to the sub-agency that you wish to modify. This will open up the agency details form for the selected sub-agency (similar to the current page). Modify the details as required.

16.3 Removing Sub-agency

Click the **Remove** button 🗑 (the trash can) next to the sub-agency that you wish to remove.

17. Pre-qualification Codes Section

Pre-qualification codes are used to indicate to potential suppliers that they must be qualified to the selected qualification in order to lodge a response to the tender. Pre- qualification codes are bound to an office, so the details are managed on this page.
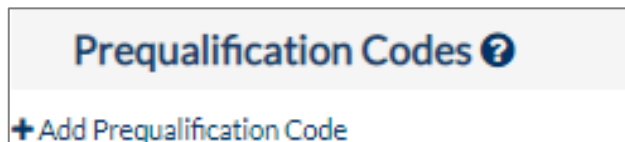
17.1 Adding Pre-qualification Codes

To add a new pre-qualification code for your business, select the **Add Pre- qualification Code** link, fill out the details in the pop-up window and select **Save Changes** (selecting **Close** will NOT save your prequalification).

17.2 Removing Pre-qualification Codes

Click the **Remove** button 🗑 (the trash can) next to the pre-qualification code that you wish to remove.

17.3 Modifying a Pre-qualification Code

Click the **Details** button ✎ (the page icon) next to the pre-qualification code that you wish to modify. Make the necessary change in the text box and click the **Update** button.

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WORKING WITH TENDERS

Overview

The SA Tenders and Contracts exists as a means of disseminating tenders and other information. The web application also supports advanced features such as:

- Creating tenders
- Ordering press advertisements (Where Approved)
- Managing tenders.

This module covers the interactions that agencies will have in regard to tenders and tenders responses.

18. Tender Creation

Tenders are created from the following sources:

- A **New Blank Tender**. An empty tender structure with no prepopulated data.
- A **Template Tender** (created by your agency). A frequently used tender with likely default values, and necessary specification documents attached.
- An **Existing Tender** (created by your agency). This option is provided in case one only realises after creating and releasing a tender that it would be useful as a template. In this case, one can create a tender from an existing tender and save it as a template with more generic values.

When creating a new tender, one can choose the basis of the tender from one of the above.
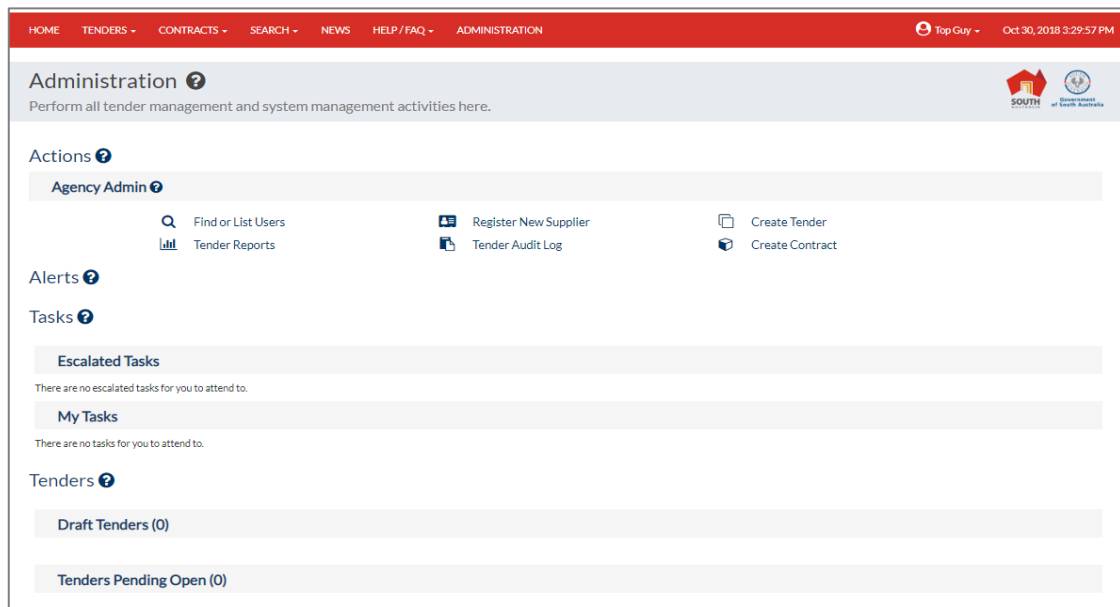
There is potentially a large amount of structured information contained in a tender. In order to simplify the process of managing this information, tenders are edited using a Wizard. The following sections provide details of each section of the Wizard.

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19. Adding New Tenders

New tenders appear on the SA Tenders and Contracts website at 12:01 am on the day nominated as the opening date.

20. Tender Wizard – General

This page controls the basic properties of a tender you are creating and some of the values entered here will also determine which other pages of the Tender Wizard will be displayed.

The following is a complete list of the general tender properties.

20.1 Agency to List Under

This is the agency name to be used in when the tender is advertised in the press. It can either by the name of the agency, or the name of the top-level agency if your agency is a child of a top-level agency.

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20.2 Tender Type

This is the type of tender to list under and does not affect any of the functionality or processing of the tender, except the **Search** function, which allows filtering based on tender type.

Select one of the following options:

- Request for Information (RFI)
- Request for Tender (RFT)
- Request for Quotation (RFQ)
- Sale Tender
- Prequalification
- Industry Briefing

- Expression of Interest (EOI)
- Request for Proposal (RFP)
- Advanced Tender Notice
- Registration of Interest (ROI)
- Invitation

20.3 Selective Tender (Restricted Tender)

In some circumstances, it may be appropriate to restrict requests for offers to particular suppliers. A selective or restricted tender is one that may only be visible to a defined group of suppliers and responses may only be received from members of this group.

Remember that users who are members of the selected supplier businesses will have to be logged in order to see selective tenders. A selective tender is not advertised, so the advertising pages will not appear.

Processes that might be used include:

- Selective call for Expressions of Interest
- Selective Request for Tender
- Selective Request for Proposals
- Selective Registration of Interest
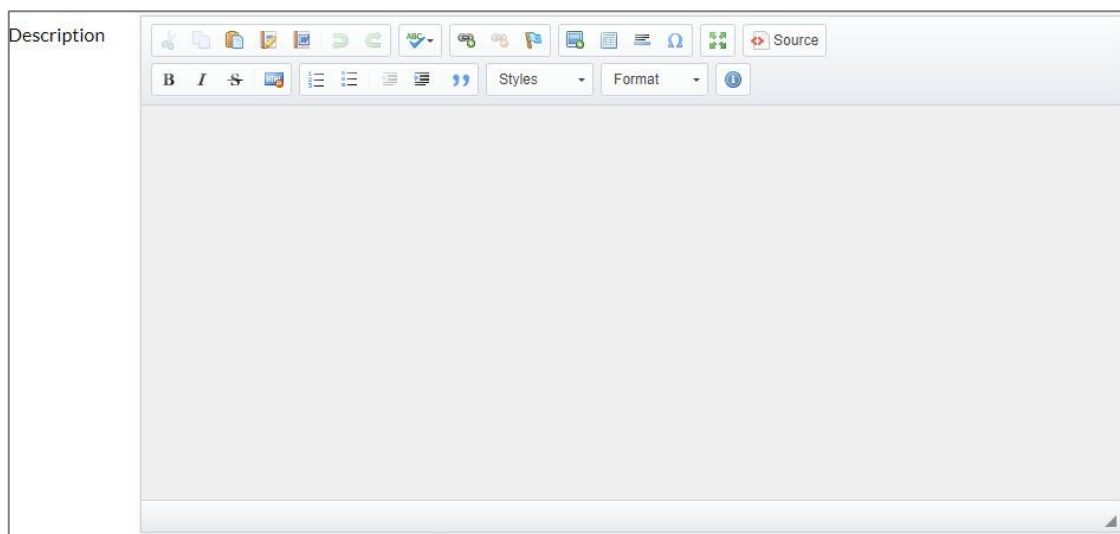- Selective Request for Quote.

20.4 Title

The title or name of the tender you are uploading. This should be a short, concise title with a maximum of 200 characters. Long explanations of what the tender is should appear in the Description field (below).

20.5 Description

Tender description is the summary information or a brief overview of the requirements of the tender. Formatting controls such as paragraphs, bulleted and numbered lists can be used here. The description should be sufficient for a potential supplier to determine whether the tender is something that they should consider responding to.

This field can be any length but should not exceed around half a page. The finer details of the tender should appear in the specification documents.

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20.6 Contract No

This is the agency-specific reference number used to identify the tender. Although all tenders in the system have a unique code, these are system assigned, based on the agency name abbreviation and a sequential count.

20.7 Pre-qualification Code

Select a Pre-qualification code from the drop-down list if it applies to your tender. This is an optional qualification to help suppliers determine whether they are eligible to carry out the required work. Pre-qualification codes are agency specific and must therefore first be created before they can be used. The pre-qualification codes are created under the business management section of the site.

20.8 Opening Date

This is the date that the tender becomes visible on the website and the tender advertisement will appear in the printed media. Specifications can only be downloaded from this day onward, and likewise responses can only be received from this day onward.

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20.9 Closing Date and Time

The actual date and time of when the tender will close. After this time, the tender will moved from Open to Closed status and will no longer accept responses (unless extensions have been granted).

20.10 Category

The United Nations Standard Products and Services Codes (UN/SPSC) system is an open, global standard that provides a logical framework for classifying products and services of all kinds throughout the world. Grouping (type) the tenders by category enables similar tenders to be listed together.

To select a category, either begin to type the UNSPSC code into the text box or select the **Search** 🔍 button to bring up the following pop up window:

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Select the most appropriate category for the tender by clicking on the actual category.

Once a level 1 category is selected from the drop-down menu, the level 2 drop-down menu will become available to show the sub categories (and so on for level 3 and 4). The **Select** button can be used to select the category and level required.

Note that if no suitable category exists, contact the Central Website Administrator to have one created.

To add another UNSPSC code, click the **Add** button (between the **Search** and **Delete** buttons) and a new UNSPSC text box will appear (as shown below).

UNSPSC *	53000000 Apparel and Luggage and Personal Care Products	100	🔍
UNSPSC *	Start typing for autocomplete	100	🔍➕🗑

You will see that both categories have a value of 100 percent by default so each individual codes percentage will have to be changed manually to make sure all the codes put together will add up to 100 percent. You may add as many UNSPSC codes as you wish as long as the sum of the percentages add up to 100.

20.11 Electronic Tender Box

Select either **none** or one of the agency's ETBs. This is used to specify if the ELS is available for this tender.

List Document Recipients	☑
Online Forum ❓	☐
Electronic Tender Box	None ▾
	None
Physical Tender Box	Home Office
Survey ❓	☐

Save as Template   Save as Draft   **Release Tender**   Save as Advance Notice

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Related Sites   Contact Us

Remember that the responses can only be downloaded to the workstation where the decryption key is saved (the workstation that you were at when creating the ETB). The list shows the office addresses for all agency offices that have an ETB.

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20.12 Physical Tender Box

Select the agency's tender box where hard copy tender responses will be received. The list shows all office addresses that have a physical tender box.

20.13 Selecting Contacts

Contacts are selected from registered users in your agency and from external contacts. Contact information is displayed on the tender details page and on the composite advertisement (if it is not a selective tender).

The methods to select contacts are:

- **Add Contact** – Click the Add Contact button to search for a Contact person who is a registered user of the system:

  - Enter partial details you know of the person, and click **Search**.

  - Choose from search results by pressing **Select**.

- **Add Other Contact** – Click on the Add Other Contact button to list a Contact person, who is not a user on the system, for this tender. (This will not add the person to the system.)

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20.14 Show Details

For each nominated contact, you can specify what contact information will be displayed. By default, the phone details are displayed on the website and in the newspaper advertisement.

To change what contact details are displayed, tick the required boxes.

Action	Name	Contact Role	Show Role ❓	Email	Phone	Mobile	Fax	Company
🗑	▬▬▬▬	Enquiries	✔	✔	✔	✔	☐	✔
🗑	▬▬▬▬	Enquiries	✔	✔	✔	✔	☐	✔

Optional Contact Functions:

Contact Role	The role of the Contact Person, e.g. Technical Enquiries, etc.
Shown Role	This option displays the person's role in the Enquiries section of the newspaper advertisement.

Display What Details:

Email	Contact Person's email address will be displayed.
Phone	Contact Person's telephone number will be displayed
Mobile	Contact Person's mobile phone number will be displayed
Fax	Contact Person's fax number will be displayed
Company	Contact Person's Business name will be displayed

Display Contact Details Where?

Website	Display Contact Person's details on the SA Tenders and Contracts website.

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21. Tender Wizard – Upload Specification Documents

This page allows you to easily upload tender specification documents to the SA Tenders and Contracts website. If this is the first time you are using this feature, we recommend that you read the detailed help. Use of a managed process has the following advantages:

Drag and Drop or Manual File Upload	To upload the Tender specifications, you can use the Drag and Drop or Manual file upload.
Progress Indication	Progress is displayed for each file, and for the group upload.
Faster transfers	Documents are transferred in compressed format. This speeds up transfers and avoids the need for additional compression programs such as WinZip.
Verified transfers	Each document is verified as it is saved in the ETB, ensuring that each response is intact.
Automated virus scan	All uploaded documents are scanned for viruses as they reach the SA Tenders and Contracts server. Any documents that are found to contain a virus are rejected, and users are informed of the problem. Users are then able to take remedial measures locally and resend the affected files.

Electronic uploads are coordinated by Drag and Drop or Manual File upload in your browser that ensures that documents are transferred to the SA Tenders and Contracts server in a safe, secure and efficient manner. Follow these steps to upload specification documents to the SA Tenders and Contracts website

21.1 Drag and Drop Option

It is recommended that tender documents should be stored in a separate folder, or a folder that contains few other files and folders.

Go to the directory that the Tender Specifications are stored and drag over to the specification area and drop in the location.

- Go to the directory and select the file.
- Drag to Drop Specification Docs here.
- Click **Upload Documents**.

> ℹ️ The **Drag and Drop** option will not be available if you have an IE version older than IE11.

21.2 Manual Upload Option

Complete the following steps:

- Select the **Use Manual Upload** button.
- Select the **Choose File** button.
- Choose your file and select **Open**.
- If you need to upload more than one file, select the **+ More Files** button and repeat the **Choose File** process again.
- Click the **Upload** button once you have selected all the files you want to upload.

Note the following points in regard to electronic specification documents:

- Documents and spreadsheets should be submitted in formats that are likely to be accessible to respondents, e.g. PDF and Microsoft Office formats.
- When uploading specification documents that are distributed in sub-folders, the folder structure will be preserved when suppliers download the documents.
- Files are compressed automatically before sending, there is no need to compress documents using WinZip or other compression utilities.
- Files that have the same name, but different extension will be considered to be different formats of the same document. This has a bearing on the notification of updates, and how documents are described.

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22. Tender Wizard – Specification Documents

If files are uploaded, the following text is generated in the e-mail to the media provider for inclusion in the tender advertisement *'Download from www.tenders.sa.gov.au'.* Tenders are associated with one or more documents.

These documents can include:

- General tender information including lodgement process
- Functional specifications
- Technical specifications
- Drawings and plans
- Draft contract
- Pro-forma documents for submission.

Some documents may only be available in hardcopy format, while others will have one or more corresponding electronic version in various formats. Specification documents may have a range of accessibility options, including electronic download, in-person collection and postal delivery. Furthermore, one may require that documents are ordered (so that they can be prepared for collection), and when they must be collected.
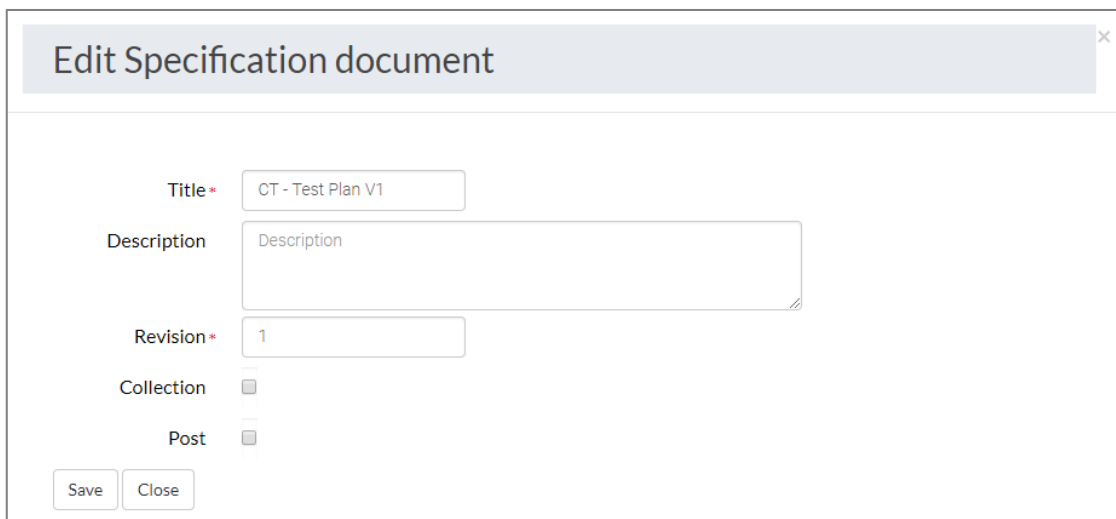
22.1 Removing a Specification Document

Click the **Delete** button 🗑 (the trash can) next to the document that you wish to delete.

22.2 Document Properties

The Agency Administrator has the choice to upload unlimited number of separate files, which are made available for suppliers to download. The specification and any other relevant contractual documentation that suppliers require for the preparation of a response should be included.

Each specification document has the following properties:

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Title	This is the display title that is used to refer to the specification document. For uploaded specification documents, this is set to the file name, less the extension.
Description	Should this tender include multiple files and formats it is recommended that the relationship or content of each individual file be communicated in the Description field.
Revision	The revision number is important, as this is used to determine if respondents have current versions of the document. It is also used by the system that dispatches automated email notifications to respondents informing them that the copies of the document have been updated. This value can be manually adjusted, although it is automatically incremented when updates are uploaded.
Collection	This option indicates that a hard copy of this document is available for collection at the issuing agency. If there are any "collectable" documents, then the collection point must also be specified. The collection time might also be required to be specified. (Set by default)
Order Required	This option indicates that the document must be ordered before collection. You would use this option for documents that are expensive or difficult to reproduce.
Post	This option indicates that suppliers can order the tender documents for postal delivery.

23. Physical Copies of Specification

Specification documents have a range of accessibility options, including electronic download, in-person collection, postal deliver and fax delivery. Furthermore, you may require that documents are ordered (so that they can be prepared for collection), and when they must be collected. Depending on the options that are selected for tender specification documents, the following information may also be required:

Collection Point	The physical location where suppliers can pick-up the tender documents from. This must be one of the physical addresses of an office in your business or it could be the **Alternative Collection Details** option.
Collection At	Specifies that tender documents must be collected from a specific date and time (optional).

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Re-position Tender Documents

This option allows the Administrator to change the order in which tender documents appear on the site.

⬇ The **Move Down** arrow will move the document down.

⬆ The **Move Up** arrow will move the document up.

You may also click and drag the arrows of a document to move it into a new position.

24. Forum Posts

As a buyer, you are able to respond, edit, delete and change the visibility of the forum posts, which are posted regarding your tenders.

Posts

Supplier Post #2 - Public Post   ⦿Make Visible ✎Edit 🗑Delete ↩Answer

This post will be made public by the Admin

Posted on 30/11/2018 13:27 by **Tender Notified** of *TENDER NOTIFIED SA*

24.1 Respond to Forum Post

To respond to a forum post, select the **Answer** button on the specific post you wish to give a response for. Next, enter the response in the **Content** box and select the **Publish** button.

Answer

Supplier Post #2 - Public Post   ⦿Make Visible ✎Edit 🗑Delete ↩Answer

This post will be made public by the Admin

Posted on 30/11/2018 13:27 by **Tender Notified** of *TENDER NOTIFIED SA*

Content *

[Editor toolbar: Source, B, I, S, Styles, Format]

💾 Publish   ◀◀ Cancel

This will take you back to the forum page which shows all forum posts for that tender. Be aware that whenever a post is added to tender by a supplier, it will automatically become visible only to admins. To make the question and response visible to the public, select **Make Visible** button and the post will be made public. If the post has a button saying **Make Invisible**, it means that the post is currently visible. Suppliers do have the option to request for the post they make to stay private and these posts will not have the option to turn the post visibility on and off.
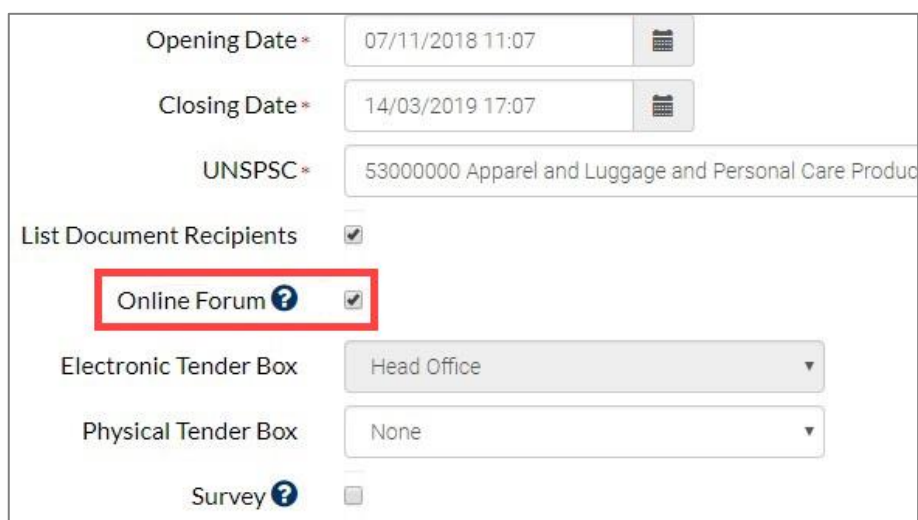
24.2 Delete Forum Post

To delete a forum post, select the **Delete** button on the post you wish to delete. A confirmation dialog box will ask you to confirm deletion of the post by clicking the red **Delete** button. By deleting a post, you also delete all responses to that post with it.

24.3 Edit Forum Post

To edit a forum post, select the **Edit** button on the post you wish to edit. The subject and content of the post can then be edited. Once you have finished editing the post, click **Save** to keep your changes or **Cancel** to revert any changes made back to their original value.

24.4 Turn Forum On and Off Through Edit Tender Page

The forum may be turned on and off by editing the tender. On the **Edit Tender** page, scroll down to the bottom to find the **Online Forum** check box and either tick or untick the box depending on whether you would like a forum for your tender.

Turning the forum off will not delete any forum posts that have already been posted to the forum. If the forum is turned off and then turned back on, all previous posts will reappear.

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25. Tender Wizard – Selective Respondents

Selective tenders are restricted to the group of nominated suppliers. Only these elected Suppliers will be able to see these tenders and be able to respond to them. The tender and any specifications associated with it are not viewable on the public site.

When a supplier is logged in, any selective tenders will show up in current tenders, and with searches just the same as public tenders. If the supplier is not logged in, the selective tenders will not be visible.

Selective suppliers are nominated on the basis of a company. That means that any registered user who is a member of that company will be able to see the tender or submit a response to it.

25.1 Selected Respondents

Currently selected suppliers for this tender are shown on the screen below.

25.2 Add Respondents

The methods to select suppliers:

- **Add Respondent** – This function allows you to use a search function to locate supplier by (partial) name that has already been registered in the system. The display is consistent in all views when searching for a person or supplier.

- **Import Respondent** – The Import Respondent function allows you to import suppliers who have responded to a previous tender published by your agency. To import respondents click **Import from Tender**, a window will appear allowing you to search for tenders based on tender code or title (partial or full title match).

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Click the hand icon next to the tender you want to import respondents from. You will be presented with a new window containing a list of all non-deleted registered suppliers who have responded to the selected tender.

Select the checkbox next to each of the respondents you wish to have as respondents or click **Select All** to select all the show suppliers. Once you have selected the desired respondents, click **Import**, and the suppliers will be added to the list of registered respondents for the current tender.

- **Add Unregistered Supplier** – This function allows you to add a user that has not been added to the system already. By clicking on **Add Unregistered Supplier**, a window will appear as shown to the right. This allows you to complete the information of the user you wish to add. Once you click add and, the tender is opened, the user will receive an email with a link that enables them to finish setting up their account and then access the selective tender.

Selective tenders are never advertised, and therefore the advertising order and advertising preview pages of the Wizard are excluded.

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26. Tender Wizard – Briefing

This page controls the details of the tender briefing, if a briefing has been selected for the tender. If there is no briefing, then uncheck the briefing option on the General page.

The information about briefings is used for display purposes only. This information forms part of the composite advertisement, and also appears on the detail view of the tender.

A briefing has the following properties:

Title	Gives a title to the briefing.
Location	Tender briefings can be held at any of the agency offices, or at an alternate venue (probably on site). Select from one of the office locations for your agency or enter a new address.
Notes	An optional area where additional, non-structured information can be specified, for example preparation details, transports arrangements, etc.
Date and Time	This is the date and time of the briefing.
Mandatory	Indicates to respondents that attendance at the briefing is a condition of responding to the tender.

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27. Advertisement Tab

The Advertisement Tab is where an ad is created that will appear in the newspaper publication of your choice.

27.1 General Information

General Information	
Order No.	Order No.
Invoice Address	346346, 346, 346 ▼
Notes for Media Provider	

Order No.	The Agency must provide the media company with a purchase order number.
Invoice Address	Allows you to select the address of where the media provider can send the invoice.
Notes for Media Provider	In this text box provide detailed instructions and any other additional information that will need to be forwarded to the media provider. Given the structure of the LGA composite advertisement this is not required.

27.2 Composite Advertisement

Composite Advertisement	
Extra description	
Recurring each Tuesday until	Recurring each Tuesday until
Electronic Downloads	☐

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Extra Description	Description of tender that appears in the ad.
Recurring each Tuesday until	Allows a tender's ad to appear in a newspapers publication for multiple weeks.
Electronic Downloads	If ticked, the ad will show that there are electronic downloads to be downloaded by potential suppliers.

27.3 Single Placement Advertisement

If your agency is not an SA Government Agency (not an internal buyer) then you will be able to post a Single Placement Advertisement.

Single Placement Advertisement allows you to select the section of the paper in which the advertisement is to appear, if it is appearing somewhere other than the Government tender page in the Tuesday Advertiser.

Comments (optional)

In this text box, provide detailed instructions to the media provider for the single placement advertisement and any additional information that will need to be forwarded to the media provider.

27.4 Newspaper Publications

The **Newspaper Publications** can be selected at the bottom of the **Single Placement Advertisement** section by ticking the checkboxes.

Selecting the names in blue will either expand or contract the options under the heading.

28. Advertisement Preview Tab

The **Advertisement Preview** tab will show the details of the ad that was filled out in the previous **Advertisement** tab.

You must proofread the tender details, checking that:

- The opening and closing dates are correct, and
- Correct tender box has been selected.

The correct tender document has been attached to the SA Tenders and Contracts website.

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29. Saving Tenders

Once all the information about the tender has been captured using the Tender Wizard, the tender can be saved in one of the following ways:

| Save as Template | Save as Draft | **Release Tender** | Save as Advance Notice |

Save as Draft	In this case, the intention is to open the tender for editing again when complete information is available.
Save as Template	The tender is saved as a template, so that other tenders can be created using the information already entered as a starting point.
Save as Advance Notice	When a tender is saved as an advanced notice, it goes into a holding state until the opening date is reached, at which point, it becomes publicly available on the website as a Future Tender. The tender cannot accept any responses.
Release Tender	When the tender is released, the **Send Email Notification** page is displayed giving the Administrator a notification that a Tender was created.

When released, the tender goes into a holding state until the opening date is reached, at which point it becomes publicly available on the website. The **Tender Saved Successfull**y screen advises the Agency Administrator that the tender has been uploaded successfully to the SA Tenders and Contracts website. A System generated Tender Code is assigned to the tender, which should be recorded for future reference.

| HOME | TENDERS ▾ | CONTRACTS ▾ | SEARCH ▾ | NEWS | HELP / FAQ ▾ | AD |

👁 Request for Tender Top0061120 has been released successfully.

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# TENDERS AND CONTRACT ADMINISTRATION

Overview

The SA Tenders and Contracts exists as a means of disseminating tender and contract information. The web application also supports advanced features such as:

- Creating tenders
- Creating contracts
- Statistical reports
- Alerts
- Tasks
- Workflow processes for requesting documents by other means.

This module covers the interactions that Agency Administrators will have in regard to tenders and contracts.

30. Administration Page

This is the administration page where all tender management and system management activities are performed. It is only accessible to Agency Administrators and Agency Clerks.
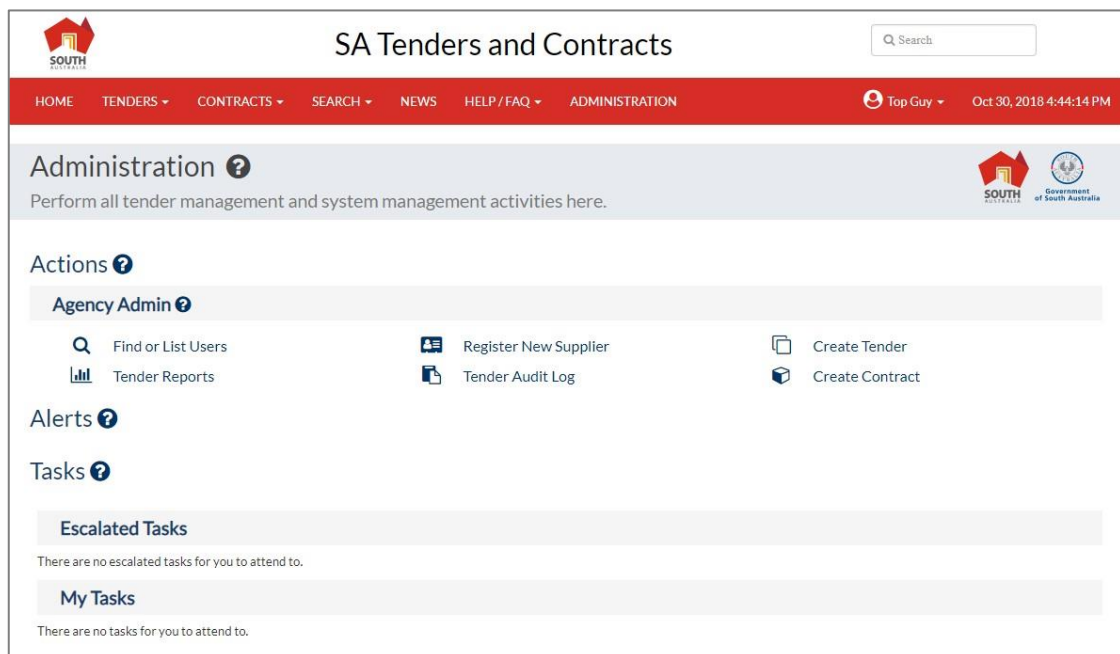
30.1 Actions

This section contains the administration activity options.

30.2 Tender Reports

Generates statistical reports for all or selected agencies and all or selected UNSPSC categories.

30.3 Create Tender

This link will open the Tender Wizard with a blank tender.

30.4 Create Contract

This link is used to create listings for newly awarded Government contracts to appear on the site. If the contract is the result of a tender, then create the contract from the closed tender.

30.5 Find Person or List Users

Agency Administrators have access to the **Search**, **Edit**, and **Delete** function enabling them to manage suppliers details and make sure the supplier is set up correctly. The Agency Administrator will be able to view details of other Issuing Agencies, Agency Administrators and System Administrators, but will not be able to edit or delete them.

30.6 Register New Supplier

The Agency Administrator can register a supplier quickly from a link in their Agency Administration screen.

30.7 Tender Audit Log

Show all website logs (such as Tender State Convert, Tender Created, Electronic Response Upload Unsuccessful, etc.).

Tasks ❓				
Escalated Tasks				
Task Summary	**Agency**	**Due**	**Created**	
Post specification documents for Tender ▬▬▬▬▬▬▬▬▬ to ▬▬▬▬▬▬	▬▬▬	12/09/2018	07/09/2018 9:23 AM	🗑
Open Tender Box for Tender ▬▬▬▬▬	▬▬▬	09/01/2017	09/01/2017 3:10 PM	🗑
Open Tender Box for Tender ▬▬▬	▬▬▬	04/01/2017	04/01/2017 1:02 PM	🗑

30.8 Alerts

Alerts are important notifications that should be addressed. They include notifications of email delivery failure, tender errors, no contract for closed tenders, etc., contract disclosure expiring.
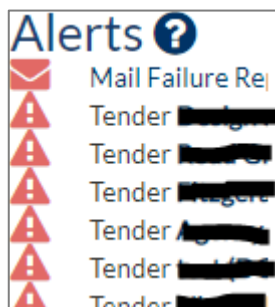
If you click on:

- The **Tender Code**, this opens the page that displays the details of this tender.
- The **Agency Name,** this opens to the page used to manage the details of your agency.
- The **Contract Name**, this opens to the page so you can update expiry details.

Some alerts remain active until the problem is remedied, while others are cleared by acknowledgement. In such cases, it is assumed that the responsible person will take the necessary corrective action relating the cause of the alert.

30.9 Tasks

Tasks are generated by activities performed by other users, or by the system. Tasks are used to manage basic workflow – the system generates tasks for users and users then act on those tasks. Tasks are diverse in nature, each requiring a specific activity in order to clear the task.

Tasks are either cleared after performing a required activity, or after a chain of events, which was started by performing an activity. On the **Administration** screen, tasks are presented in order of due date, with those tasks that must be acted on soonest displayed at the top.

30.10 Escalation

All tasks have a due date and an (optional) escalation date. The due date provides an indication of when the task must be acted upon. The escalation date specifies when the task will be escalated. All tasks are escalated to the System Administrator.

Once a task is escalated, it will appear on the **Administration** screens of both the original owner, and the System Administrator. This means that although the task has been escalated, it can still be cleared by the original owner.

30.11 Notification

A user will only be aware that there are tasks of their attention by logging in to the system and viewing the administration page. Since users may only log on from time to time, they may be unaware that there are tasks awaiting action. The system therefore includes an email notification feature that causes an email to be dispatched under the following conditions:

- When a task is escalated, an email notification must be sent to the System Administrator at the time of escalation to ensure it is acted upon.

- When a task's due date is approaching, and the user has not recently logged in to the system.

30.12 Task Lifecycle

When a task is first created by the system, it is an assigned with a due date, optional escalation date, and is then assigned to a specific agency. Tasks are also assigned to a role in the target agency. That means that anyone with the specified role in the target agency can act on the task. Furthermore, bearing in mind that user roles are hierarchical, any user with a role of greater privileged level will also be able to act on the task.

Tasks appear on the **Administration** page for the target agency. Tasks are presented as single line items showing the task description, the date and time that the task was created and when it is due. Clicking on the task opens up a screen for the selected task. This does not constitute acting on the task. The screen that is presented will display more information about the task and provide the opportunity to complete the task – one can always escape at this point.

Each task type has a specific type of page, with information appropriate for that type of task. For example, opening a task that require specification documents to be dispatched by post will display details about the user who requested the documents, and optionally record the list of documents posted, and the address where the items were posted. Opening a task to open a tender box would display more information about the tender and optionally record the tender team and allow the download of responses for this tender.

Once a task has been acted on, it is closed and removed from the **Administration** screen.

30.13 Task Types
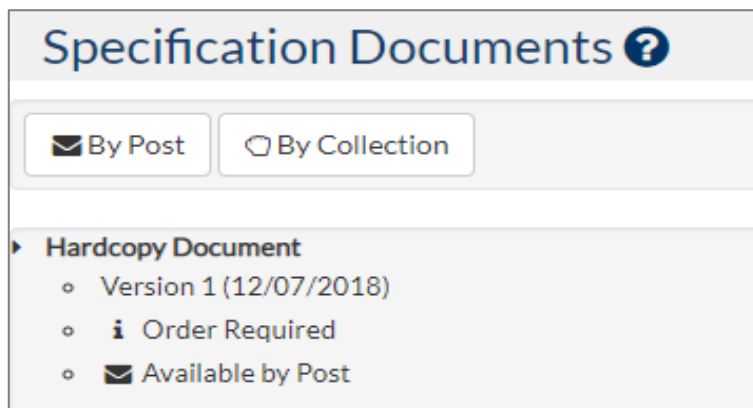
The following is a list of possible task types:
- Prepare tender specification documents for collection by a Supplier,
- Post tender specification documents to a Supplier,
- Open a tender box,
- Sign-Off Advertising,
- Advertising Has Changed.

30.13.1 Order for Collection

In most cases, tender specification documents will be available for collection in hardcopy format from the agency issuing the tender. In some cases, however, it may be required that Suppliers order documents for collection. This could be the case when there is significant cost in producing specification documents.

- Click on the task.
- The **Prepare Specification Documents for Collection** page is displayed.
- Tender details are displayed for confirmation purposes:
    - List of documents requested,
    - Who requested these documents and when,
    - Where the documents must be collected.
- Click the **Documents are ready for Collection** button.
- The supplier will be informed by email that the documents are ready for collection at this address.

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30.13.2 For Postal Delivery

This option allows Suppliers to request documents to be posted to them by regular mail. This will notify the issuing agency to prepare the selected documents and post them to the Supplier at the specified address.

- Click on the task.
- The **Post Specification Documents** page is displayed.
- Tender details are displayed for confirmation purposes.
  - List of documents requested,
  - Who requested these documents and when,
  - Where the documents must be delivered to.
- Click the **Documents have been Posted** button;
- The supplier will be informed by email that the documents have been posted to this address.

30.13.3 Sign-Off Advertising

This option allows you to either approve or reject the proof that has been submitted by the advertiser for your tenders advertisement.

Select the blue 'Advertisement PDF File' to view the proof that has been submitted by the advertiser. You can then either **Accept** or **Reject** the advertising proof, supply any additional information to the advertiser in the **Additional Information** area and then submit your sign-off by clicking the **Submi**t button.

30.13.4 Advertising Has Changed

This task is generated if the advertiser makes further changes to your ad proof.

Select the blue 'Advertisement PDF File' to view the proof that has been submitted by the advertiser.

The **Reason for Changes** to the ad proof will also be displayed. Select the **Signoff Advertising** button to approve the ad proof.

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31. Tender Activities

This is where tenders are managed. Tenders are grouped according to the state. The groups are:

- Draft Tenders
- Advanced Tender Notices
- Tenders Pending Open
- Open Tenders
- Closed Tenders
- Tender Templates.

32. Modifying Tenders

Once a tender has been saved and released, and even when it is open, certain tender information can be modified. Other than correcting errors and omissions, the most obvious uses are updating documentation (questions and answers, etc) and to extend the closing date.

32.1 Tender Popup Menu

Depending on the state of a tender, the Administrator can perform various operations on the tender. These operations are launched from the menu icon on the tender summary. To display the menu, simply move the mouse over the menu ☐ icon, and then select the desired activity.

The menu will include one or more of the following:

Edit this tender	Opens the Tender Wizard loaded with the tender.
Issue documents	Issue tender specification documents to suppliers who collect in person.
Extend closing date	Extends the closing date for one supplier.
Record hardcopy response	Records hardcopy responses. This can be done at the time that tenders are lodged, or after the physical tender box is opened.
View tender responses	Displays information about the responses to the tender.
Edit response summaries	Captures key information about the tender responses
View spec doc recipients	Displays all recipients of specification documents for the tender, and the details of how they were acquired (download, post, etc).
Mark as awarded	Changes the state of the tender to 'Awarded'.
Mark as not awarded	Changes the state of the tender to 'Not Awarded'.
Create contract from this Tender	Creates new contracts, using details from existing tender.
View Tender Team	Displayed the tender team that was present when the tender box was opened.
Download Tender responses	Downloads (and decrypts) the tender responses from the server. Although this is part of the procedure of opening the **ETB**, it can also be performed again after the initial opening.
Create a new tender from this tender	Create a new draft tender from this tender.
Withdraw this Tender	This option will remove the released tender from the 'Pending for Open' state and the 'Current' state and mark the tender 'Withdrawn'.

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32.2 Updating Specification Documents

Specification documents are updated by going to the **Administration** page where all tender management activities are performed.

- Scroll down the page until you find the appropriate tender.

- Click the **Action Menu** icon.

- Select the **Edit Tender** option.
- Select the **Specification Documents** tab.
- Use **Drag and Drop** or **Manual Upload** to add documents as required.

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32.3 Update Notifications

Each time that tender information is changed, the option to send out an email notification to 'interested parties' is given after the tender is saved. The list of people will be the combination of all people who have downloaded specification documents for the tender, and the primary contact for selective respondent companies (if no one from the selective company has yet downloaded documents).

> **ℹ** If the **Send Notifications** button is not clicked after the tender is saved then no emails will be sent out to anyone to notify them of any changes to the tender

33. Extending the Closing Date

Once a tender is open, the closing date can be extended. Extensions can be for all Suppliers, in which case the tender closing date is extended, or an extension can be granted to a single Supplier. On the closing date extension form, a record is shown of all previous extensions granted. From to the **Administration** page:

- Scroll down the page until you find the appropriate tender.

- Click the **Action Menu** icon and select the **Extend Closing Date** option.

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When granting extensions, the list of possible companies is generated from all who have received specification documents.

- In the **Business Name** field, select the appropriate Supplier(s) or leave empty.

- Click the **Date Picker** icon.

- Select a **New Closing Date** and **Time**.

- Enter the Reason for Extension;

- Click the **Add Extension** button.

- Click the **Save Tender** button.

- The **Closing Date Extension** confirmation screen is displayed;

- Select the **Return to Administration** button.

When a Supplier logs on to the site, although the tender will appear Closed, **the Electronic Response** icon will appear, and the system will accept responses from suppliers who have been granted an extension. Other suppliers and anyone who is not signed in will not see the **Electronic Response** icon.

34. Issuing Tender Specification Documents

This page is used to record when tender documents are collected in-person by a supplier. These details are captured so that the supplier will receive automated notifications of updates and changes to the tender. From the **Administration** page:

- Scroll down the page until you find the appropriate tender.

- Click the **Action Menu** icon and select the **Issue Documents** option.

- All specification documents for this tender are selected by default.

- Select the person collecting documents.

- Type in a partial name of the supplier and click **Search**.

- This will list of all members of the businesses that match.

- Click the **Select** button next to the supplier's name.

- Select the location where documents are being issued.

- Check with the respondent whether their details can be published.

- Click **Issue Documents** to submit the form.

- The confirmation screen appears.

- Select the **Return to Administration** button.

35. Recording Hardcopy Responses

This page is used to record hardcopy responses that are delivered in person either by courier or a representative of the respondent business. From the **Administration** page:

- Scroll down the page until you find the appropriate tender.

- Click the **Action Menu** icon and select the **Record Hardcopy Response** option.

- Type in a partial name of the business and click Search.

- This will list of all members of the businesses that match.

- Click the **Select** button next to the supplier's name.

- The **Physical Tender Box Location** will be displayed.

- Select the **Lodgement Date** from the date picker.

- Select the **Lodgement Time** in hours and minutes.

- Click the Record Response button to submit the response.

- The confirmation screen appears.

- Select the **Return to Administration** button.

Responses must be recorded as having been made by a person. In the case that the tender is delivered by a member of the business who is registered with SA Tenders and Contracts, this page is used to capture their details as the person lodging the response.

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36. View Specification Recipients

This page displays all specification document recipients and contact details for all recipients of this tender. When this page is viewed by the Agency Administrator the list shows all document recipients, irrespective of whether they gave permission to have their details published.

In addition, the following information is also made available:

- The means by which the documents were obtained (download, fax, post, collection)

- The information presented here is pertinent to the means by which the documents were obtained (e.g. person who issued documents, addresses sent to, fax number, etc).

- The details of the date and time that the documents were issued.

To view the contact details of the person who has downloaded the tender documents, just click on their name.

The following details are displayed:

First Name, **Last Name**, **Position**, **Login**, **Email Address (es)**, **Phone Number(s)**, **Role and Business** (to view the Business details, click on the (View) link)

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37. Download Tender Responses

Use this activity to open the tender box for the selected tender. The tender team must be present to open the tender box, and you must be at the ETB PC in order to download responses.

This function downloads (and decrypts) the tender responses from the server. Although this is part of the procedure of opening the ETB, it can also be performed again after the initial opening

From the **Administration** page where all tender management activities are performed:

- Under Tasks, you will have an action to 'open tender box' or scroll down the page until you find the appropriate tender.

- Click the **Action Menu** icon and select the **View Tender Responses** option.

- Click the **Open Tender Box** button.

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38. The Tender Team

Tender team members need to be recorded as being present when the tender box is opened. Tender team members can be any registered user of the system, of can be created on the fly if not already registered with SA Tenders and Contracts.

Team members are likely to members of the agency that issued the tender and these people are therefore displayed prominently for easy access. All other team members are located using a name-based search.

- Select **Team Members** present from **Available** list (at least 3).

- If people are not displayed then **Search for Team Members** using the **Search** function.

- Type in a partial name of the business and click **Search**.

- Select from the **Team Members** displayed or **Create team Member**.

- Click **Save tender team**.

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39. Downloading Tender Responses

The tender response download provides a simple and easy means to retrieve tender responses.

- Upload the ETB key by either **Drag and Drop** or **Manual Upload**.
- Select the files to download.
- If this is the first time that you are downloading responses, then all files will be selected.
- Select **Download responses** button. This will initiate the download sequence.
- Select **Return to Administration** button.

39.1 Downloaded Response File Structure

A folder structure is created underneath the selected response folder for each company that submitted a response, and the files for that response are place in that folder.

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39.2 View Tender Responses

This page displays the final responses lodged by each respondent as well as the summary details captured after the responses were evaluated.

Code & State	Details	Date	Category	
DEV028091 Closed	▉▉▉ ▉ 📎 Issued by Developer Administration Category Apparel and Luggage and Personal Care Products	closing 9 Jan, 2017	Apparel and Luggage and Personal Care Products	...

The Tender box was opened at **1 Nov, 2018**

Tender Team ❓

Name	Agency	Email Addresses
Developer Administrator	Developer Administration	▉▉▉▉▉
Val Star	Developer Administration	▉▉▉▉▉

📄 Export to CSV file

it r us

Lodged	9 Jan, 2017
Lodgement Method	electronic response (receipt number: 201651)
Lodged by	▉▉▉ Office: +61 (08) 80808080 client@nodomain.com.au

mm

Lodged	9 Jan, 2017
Lodgement Method	electronic response (receipt number: 201650)
Lodged by	▉▉▉ Office: +61 (08) 0000 client@nodomain.com.au

Only those summary details, which have been entered, are displayed for each lodgement.

If information is missing, it can be updated using the **Edit response summaries** tender activity.

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39.3 Edit Response Summaries

This page is used to capture summary details of each of the responses to this tender.

To capture response summaries, enter the required information for each response:

- Key Price Points
- Summary of Deliverables
- Reason for Information Exclusion
- Click the Save Response Summaries button at the top of the page.
- The **Response Summaries Edited** screen is displayed.

Response summaries can be captured gradually. It is not required to enter all summaries in one session. Each time that this page is accessed, the existing summary details already entered will be displayed again for optional updating.

40. Awarding Tenders

Tenders can be awarded in one of two ways. Firstly, using the **Mark as awarded** option in the tender context menu or by creating a **Contract** from the tender.

- Scroll down the page until you find the appropriate tender.
- Click the **Action Menu** icon.

- Select the **Mark as awarded** option.
- Input reason for awarding tender.
- Select the **Award Tender** button.

The system will change the state of the tender to **Awarded** and therefore, suppliers will be able to view this tender publicly but not respond to it or download the tender documents.

41. Not Awarding Tenders

This option is for Tenders, which have been cancelled and will not be awarded, or an Expression of Interest, Request for Information, Registration of Interest, Industry Briefing or Invitation that has closed but will not be let.

Tenders can be removed from the **Closed Tenders** section by using the **Mark as not awarded** option in the tender context menu.

- Scroll down the page until you find the appropriate tender.
- Click the **Action Menu** icon.
- Select the **Mark as not awarded** option.
- Input reason for awarding tender.
- Select the **Save Unawarded Details** button.

The system will change the state of the tender to Not Awarded and therefore, suppliers will be able to view this tender publicly but not respond to it or download the tender documents.

42. Find Person of List Users

This page allows you to locate users, based on partial information. The **Search** function accepts the following criteria:

First Name / Last Name	The search on these criteria is based on a 'sounds- like' comparison, so the search will be tolerant of most misspellings, but it also means that some unexpected results might be returned.
Email address	This is a partial search. A user will be returned by the search if any one of the users email addresses contains the specified string.
Business name or ABN	Also a partial search based on a word fragment. All users will be returned who belong to a business whose name or ABN contains the characters specified. This is case insensitive -specifying 'inc', 'INC' or 'Inc' will all return users who are members of 'Acme Inc'.
Role	Users with the selected role will be returned.
Show Deleted	This will show users who have been deleted from the system.

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A search request will respond with a listing of all users that match the specified filter criteria. From the listing, you can modify the user's details, or log in as that user and perform activities on their behalf.

- Partial searches (email address, business name) are database intensive and slow. Always try to use other qualifying criteria such as a name or role to improve the response time of queries.
- Multiple criteria can be specified. When specifying multiple criteria, the search will require that the user's details match *all* the specified criteria, as opposed to *any* of the criteria.

43. Register New Supplier

When registering, a business is created with one member and one business office. Although people interact with the SA Tenders and Contracts system, these people act on behalf of their business. Business membership is used throughout the site, in the provision of services.

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To register the new User:

- Enter the **Name** (The full trading name of the business), the **ABN** (The Australian Business Number), **Address** including **City**, **State / Province**, **Country** and **Zip/Postal Code**.

- Enter the **Name** and **Position** details of the person you are registering as the primary contact for the business and provide a **Username**. Select a meaningful username consisting of at least six characters (number or letters). This will be used each time that you log in to the site.

- Enter an **Email Address**. The email address is used by the site to dispatch automated notifications and used to send registration confirmation, and details of how to login to the site.

- Enter at least one **Phone Number**.

- Click the **Register** button.

A system-generated password will be emailed to the User, with a confirmation of the registration. Once the User has logged in using the supplied password, they can change it to a password of their choice.

44. Statistical Reports (Tender Reports)

This page displays statistics about tenders that have been issues by your Agency and opened during a specific date range.

The following details are accumulated for tenders that fall in the specified date range:

Selective	Counts selective tenders
Electronic Documents	Counts tenders that had electronic specification documents available
ETB	Counts tenders that accepted electronic responses.
Document Requests (excl. downloads)	Counts the total number of documents requests, excluding electronic downloads. In other words, this counts the number of documents issued by in-person pickup and by postal or fax delivery.

Document Downloads	Counts the number of times that documents were downloaded electronically.
Total Responses	Counts the total number of responses to this tender.
Electronic Responses	Counts the number of electronic responses to this tender.

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DEPARTMENT OF THE PREMIER AND CABINET

The Department of the Premier and Cabinet (DPC) provides central agency leadership on key issues that affect South Australia's future prosperity.

Further information is available from the Department of the Premier and Cabinet http://www.dpc.sa.gov.au/.

Site Management

SA Tenders and Contracts site is centrally managed by e-Procurement Systems Support, Engagement and Change, Shared Services SA, Department of the Premier and Cabinet but specific tender information is managed by the individual agency responsible for the tender opportunity.

Role of e-Procurement Systems Support

The e-Procurement Systems Support is responsible for the development and management of the SA Tenders and Contracts website on behalf of the South Australian Government and other Public Sector agencies.

Tender information on the website is managed by the individual agency responsible for the bidding opportunity.

e-Procurement Systems Support has a primary focus on new and significant corporate Departmental programs and projects, which include identifying, initiating and managing the development of business projects that have a Departmental-wide focus or impact and in some circumstances have a government-wide focus. e-Procurement Systems Support also engage in monitoring and reporting on the progress of Departmental business projects.

For further information contact:

Business Systems Service Desk
Shared Services SA
Department for Treasury and Finance

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