



OpenBee P.M.

Collaborative solution for proposal management

The Challenges in proposal management



- Manage a centralized document database
- Monitor, update and share common and recurring documents



- Control lead times and enforce procedural compliance
- Involve various departments and manage their contributions



- Improve traceability and visibility
- Have an overall view and produce statistical reports

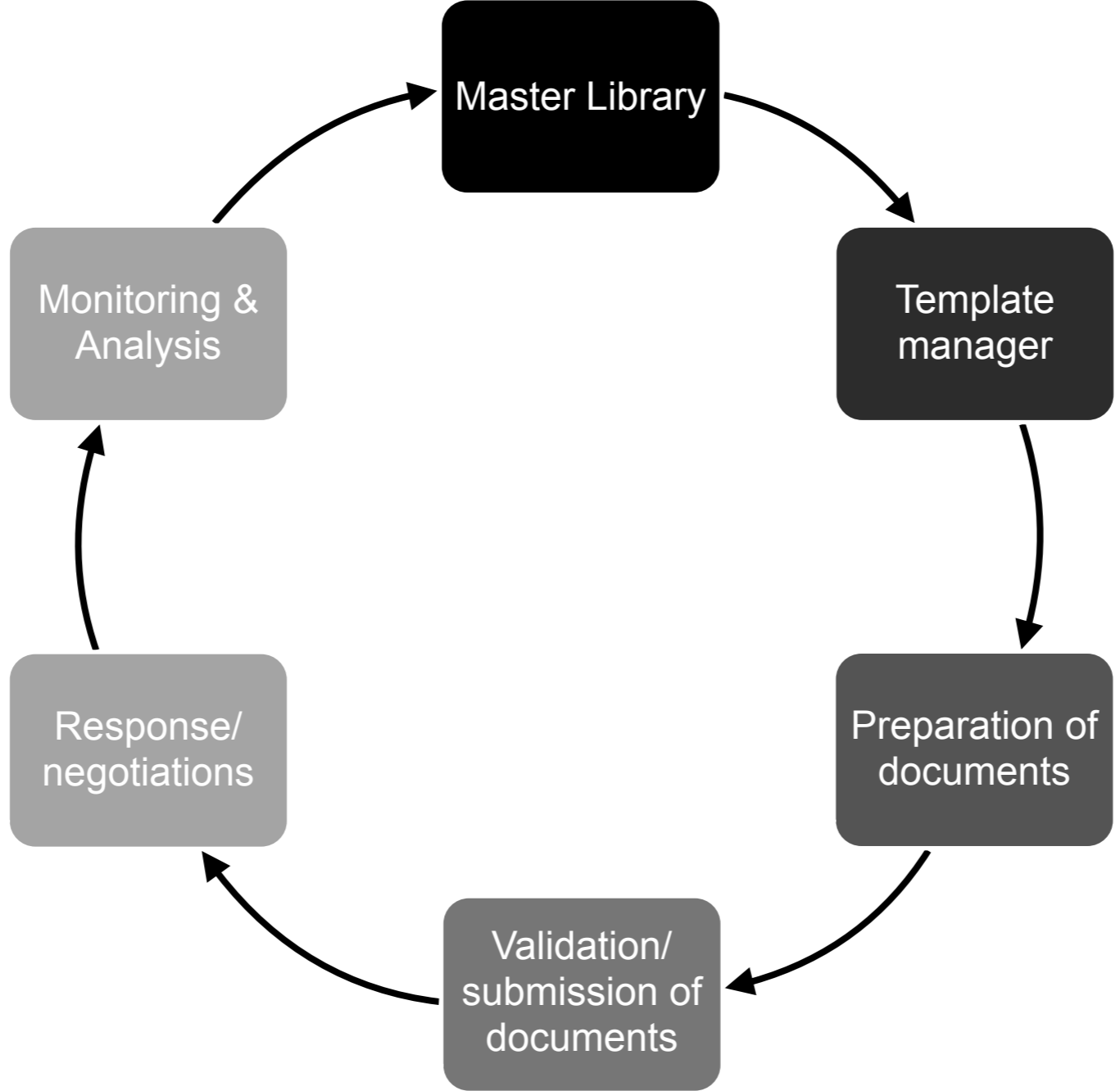
The constraints to meet



Constraints

- Dematerialization (from paper to electronic format) of formal procedures for proposal management
- Organization (commercial / technical / controlling, ...) is geographically dispersed
- Limited resources
- Avoid multiplications and document files








Functional process



OpenBee Role management (permissions)

Close

Show settings for Template Editor

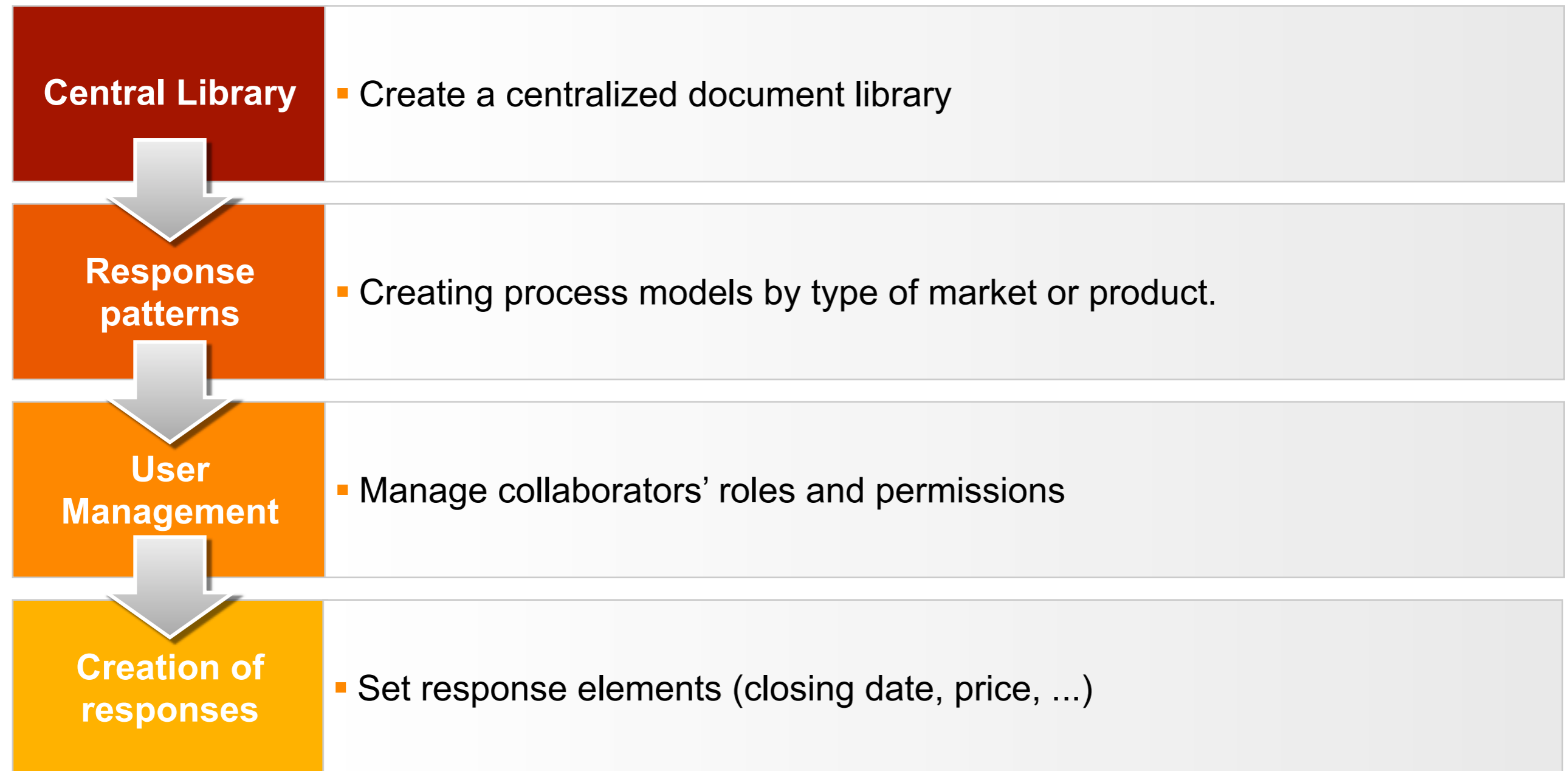
Document Type	
	Tender Document
	Specification Document
	Hidden
	Pricing
	AFE
	Inspection Protocol
	Executive Summary

Project settings permission	
	ENABLED
No records to display.	
Project settings permission	
	ENABLED
Edit project name	<input checked="" type="checkbox"/>
Edit category	<input checked="" type="checkbox"/>
Edit item type	<input checked="" type="checkbox"/>
Edit project description	<input checked="" type="checkbox"/>
Edit template additional language support	<input checked="" type="checkbox"/>
Edit priced item	<input checked="" type="checkbox"/>

Project management permission	
	ENABLED
Make template available	<input checked="" type="checkbox"/>
Manage internal user roles	<input checked="" type="checkbox"/>
Re-order documents	<input checked="" type="checkbox"/>
Delete/cancel/defer/recover tender	<input checked="" type="checkbox"/>
Generate printable tender documents	<input checked="" type="checkbox"/>
General options	
	ENABLED
Receive system notifications	<input checked="" type="checkbox"/>
Receive notification of unopened correspondence	<input checked="" type="checkbox"/>

Preparation phase

... to create a proposal or respond to a tender



Central document library

Import paragraphs into library

Procedure Library

- DEFAULT
- General consulting/custon
- iSpec Development Spec
- iSpec Full Proposal
- iSpec Implementation
- iSpec License Proposal
- Proposal
 - Enhancementicous
 - Location
 - References
- iSpec License Proposal w
- iSpec proposal (registered)
- Remy Websites
- Reseller Agreement
- TenderWiz Hosting Propo
- TenderWiz Proposal

English content properties

Name: References

Specialist User: System Administrator

Status: Available

Save Changes

Edit the information and attach documents as required

Detail_Input: Detail_TextArea

Detail_TextArea: Decimal_Fields

Decimal_Fields: Numeric_Fields

Numeric_Fields: Money_Fields

DP World is the largest global user of iSpec with the most users and the longest history with the solution. Either John [Arnold](mailto:john.arnold@dpworld.com) or Paul [Jordan](mailto:paul.jordan@dpworld.com) may be contacted for a reference via email or on the numbers listed in the email below which was a rating of Remy's Customer support.

From: "John Arnold" <john.arnold@dpworld.com>
 Date: 6 August 2008 14:37:05 GMT+07:00
 To: "PIETER BOSHOFF" <pboshoff@remy-ia.com>
 Cc: "Paul Jordan" <paul.jordan@dpworld.com>, "Tonia Winters" <twinters@remy-ia.com>
 Subject: RE: iSpec support

Dear Pieter,
 Please find our response as follows:

Item	Description	Rating	Comment
1	Access to support personnel	5	Very good. Personnel always

Key points

- Centralization of all clauses and documents
- Each element is associated with a user in charge of approval and amendment
- Integrated permissions management

Centralized process model management

Template Manager
Template: Reseller Agreement (Available)

General functions: | Reminders | Attachments
Management functions: | Edit properties | Create copy | Delete | Manage user access
Generate printable documents

Group by document type
Add new document

Document	Percentage done	Authors	Last updated
Reseller Agreement	100.00 % Update	System Administrator	07 Oct 2010 10:17:26
Software License Agreement	100.00 % Update	System Administrator	07 Oct 2010 10:17:34
Support and Upgrade Agreement	100.00 % Update	System Administrator	07 Oct 2010 10:17:41
Pricing	0.00 % Update	System Administrator	06 Jan 2010 09:32:16
Marketing materials	100.00 % Update	System Administrator	07 Oct 2010 10:17:50

Last Updated 05 Oct 2009 04:05:29

Template: Reseller Agreement (Available)

General functions: | Reminders | Attachments
Management functions: | Edit properties | Create copy | Delete | Manage user access
Generate printable documents

Close

User Access

Select a user to assign

Send email message to all

Full Name
System Administrator
Tonia Venter

Show history

2009 10:00:00

2009 10:00:00

2009 10:00:00

Key points

- Creating formalized process models (Templates) according to the types of proposals
- Dynamic integration of documents from the centralized library
- Association of a team to a model

Permissions and task management

Close

Show settings for Proposals

Document Type

Tender Document

Project Phase	ONLY EDITABLE ITEMS	SHOW	ADD	EDIT	DELETE	CC Mail
In preparation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Approval in process		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Awaiting publication		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bid submitted		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

✖

Specification Document

Hidden

Pricing

AFE

Inspection Protocol

Executive Summary

Executive Summary

Inspection Protocol

VLE

Proposal

Contract

Key points

- Assignment of tasks in the documents, validation steps, ...
- Management of permissions to users, models, responses

Creating a proposal/quotation

Customer: Mondl Quote: Mondl Submit by 27 Sep 2010 Result expected by 29 Oct 2010

Department: BeyondOutsourcing Value: \$449,900.00

Prepare → Approve → Submit → Result

Obtain content approval Start

General functions: | Approval/Submission status | View pricing | Reminders | Attachments
 Management functions: | Edit properties | Create copy | Delete | Set status to deferred | Set status to canceled | Manage user access
 Generate printable documents

Items marked with * are compulsory

General	Dates	Users	Description
*Name	Mondl		
*Approval	iSpec proposal		
Approvals	<input checked="" type="checkbox"/> Content approval <input checked="" type="checkbox"/> Submission approval (Sales Manager) <input type="checkbox"/> Submission approval (Branch Manager)		
Category	iSpec proposal		
Item Type	Proposal		

Next >

Next >

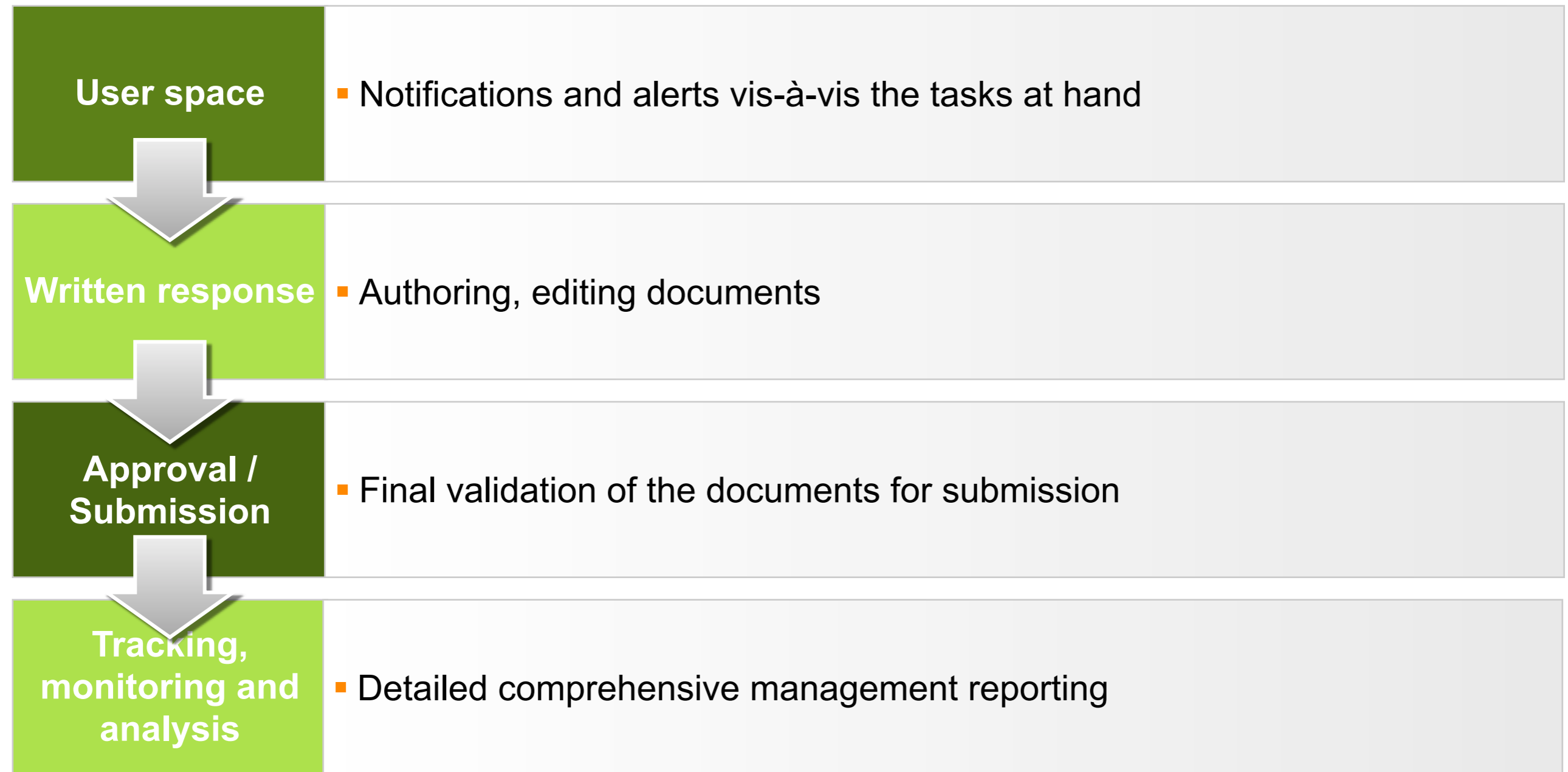
περ_λβε: [μιοβοση]
 επιβολη: [iSpec μιοβοση]
 επιβολη: [επιβολη επιβολη (επιβολη επιβολη)]
 επιβολη: [επιβολη επιβολη (επιβολη επιβολη)]
 επιβολη: [επιβολη επιβολη]
 επιβολη: [επιβολη επιβολη]

Key points

- Creating a project from an existing model
- Definition of submission dates, closing ...
- Allocation of roles and tasks (control, approval, ...)

Active phase

... Management process model phases



User workspace

Quick-Nav My OpenBee

Welcome back System Administrator

Outstanding approvals
You have outstanding approvals. Please complete these items before continuing.

Bid opening approvals
[Oxmosis](#)

Proposals due
There are proposals you need to submit or follow up

Proposals to be submitted within 7 days
[GMAPS Joint Development Project - Ship Registry](#)
[Mondi](#)

Library

Templates

Reports

Reports

Reports

Key points

- When connecting to the software, each user is notified of tasks
- A daily email is also sent him directly at his email address with a reminder of tasks

Authoring documents and responses

The screenshot displays a software interface for document authoring. On the left, a navigation pane shows a document structure with sections like 'Preamble', 'Executive Summary', 'Proposed software', 'Scope of Work', 'Main project detail', 'Pricing', 'Terms and conditions', 'License Agreement', 'Support Agreement', 'Locations', and 'References'. The 'Terms and conditions' section is currently selected.

The main content area shows a preview of the document with a table of pricing. The table is as follows:

Software	50% due on order placement and 50% within 30 days of installation of software.
Support and Enhancement fees Subscription:	100% due 30 days after installation.
Training:	50% advance payment due on order placement; Balance 30 days after invoice with usage invoiced monthly.
Professional Services:	Usage invoiced monthly. Payment within 30 days.
Estimated expenses:	For the customer's account.
Other expenses:	100% due 30 days after monthly invoice date.

Below the table, there is a note: "All services quoted were based on information supplied by the customer and typical requirements for most installations. However if the customer requirements result in more or less services, such difference will be for the customer account." and another note: "All payments due must be received within 30 days of invoicing. All outstanding invoices, after the 30 days grace period, will accrue interest at the rate of 1.5% per month."

The interface also features an 'Attachments' section with a 'Select a file to attach to this item' prompt. It is divided into 'Linked attachments' and 'Uploaded files'. The 'Uploaded files' section shows a list of folders: Brochures, Presentations, Pricing, Proposal spreadsheets, NZDF Files, Proposals, RFIs received, and DPW Offline inspections. There are blue arrows pointing from these folders to the 'Linked attachments' area.

At the bottom, there is a search bar, a 'Remove' button, and 'Add' and 'Delete' buttons. Below these are 'Upload' and 'Download' buttons.

Key points

- Dynamic modification of documents during the drafting phase
- The completed items are marked by a green pencil
- At any time, an attachment may be attached to a clause

Final approval and submission of the documents

Customer: SABMiller Quote: SABMiller Rental and Implementation (Successful) Submitted on 26 Aug 2010 Result received on 26 Aug 2010
 Department: Admin Value: €190,975.00 Result: Successful

Prepare → Approve → Submit → Result

General functions: | Approval/Submission status | View pricing | Reminders | Attachments
 Management functions: | Edit properties | Create copy | Set status to completed | Manage user access
 Generate printable documents

iSpec rental, training and implementation proposal
 Group by document type
[Add new document](#)

Document	Authors	Last updated
iSpec Proposal	System Administrator	13 Aug 2010 03:33:45

Last Updated 26 Aug 2010 08:36:55

26 Aug 2010 08:36:55

Document	Authors	Last updated
iSpec Proposal	System Administrator	13 Aug 2010 03:33:45

26 Aug 2010 08:36:55

[Add new document](#)

[View all documents](#)

[View all documents](#)

Key points

- Once completed, the documents are validated by an authorized person
- Once validated, the overall record is then available in electronic format online or ready to be printed, signed, sent by email or mail

Traceability/audit-ability

The screenshot displays a software interface with a document preview on the left and an email message history on the right. The document preview shows a tree view of sections: Preamble, Executive Summary, Scope of Work, Pricing, Financial terms and conditions, and Terms and conditions of rental. The email message history shows a message from Pieter Boshoff dated 13 Aug 2010, 2:46:53. The message content includes a subject line, recipient information, and a body of text explaining a change in the proposal.

Message history

Date posted: 13 Aug 2010, 2:46:53 By: Pieter Boshoff
 Action taken by System Administrator on 21 Aug 2010, 5:28:07

(Admin)
 To: Remy InfoSource team (private internal correspondence team)
 System Administrator, Tonie Venter

Cc:
 Subject: Correspondence regarding SABMiller Rental and Implementation

John,

Sorry - I should have explained myself better. What I meant was that is optional and would be a good idea in case make customizations to ISpec. I will remove it.

I also see that I omitted the purchasing option. That has been added as well.

Best,

Pieter Boshoff
 Managing Director
 Remy infoSource
 Australia: +61 2 9431 5350
 Now in: Thailand: +668 9108 3244
 South Africa: +27 711 497764
 pboshoff@remy-is.com
 www.remy-is.com

A revolution in Tender and Contract Management Systems

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 now in: thailand: +668 9108 3244
 australia: +61 2 9431 5350
 remy infoSource
 managing director
 pieter boshoff

Key points

- All exchanges of emails internally or externally are automatically saved and attached to file reply

Tracking proposals

Show Summary

Search by keyword(s)

Displaying 1 to 10 of 151 records Page size: 10 Sort by: Name

Expand all Collapse all

1 2 3 4 5 6 7 8 9 10 ...

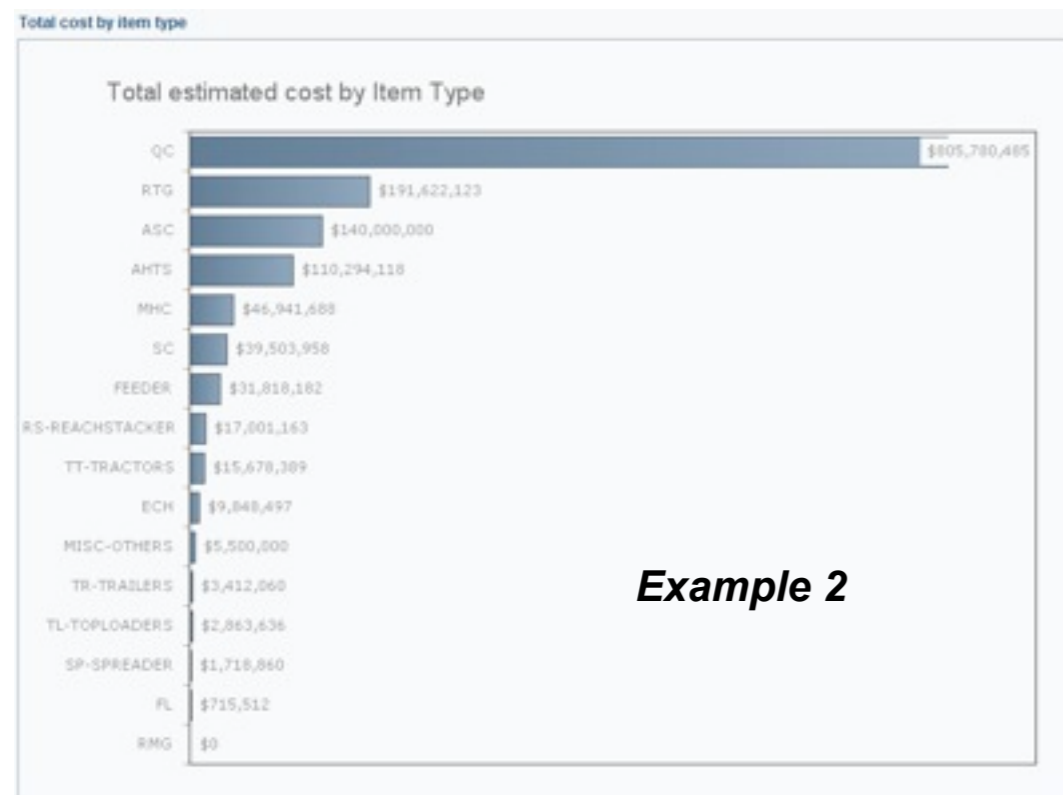
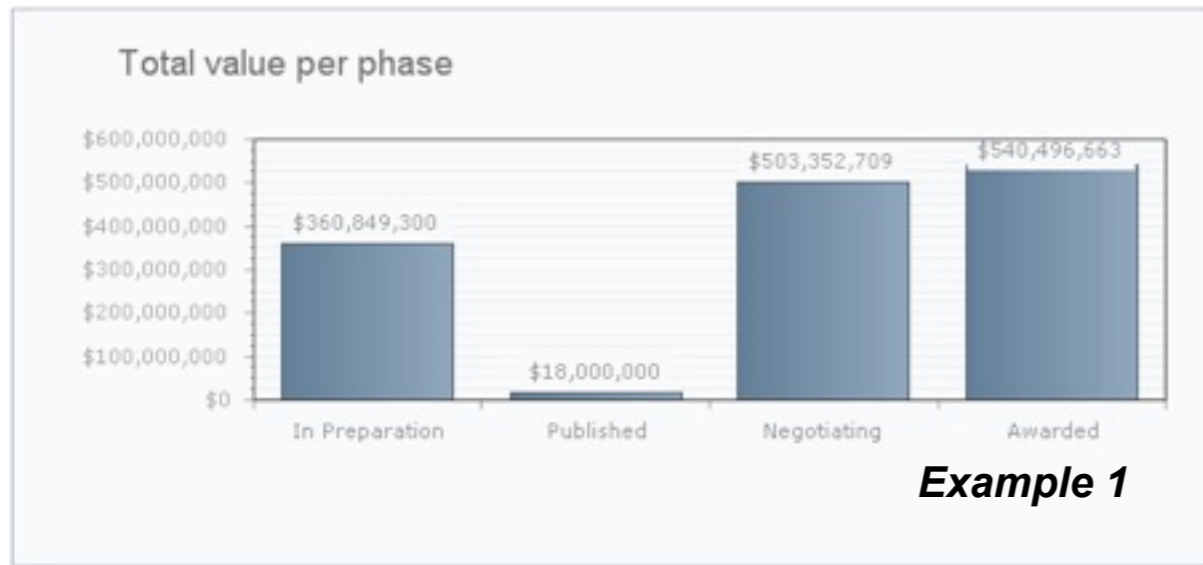
001 - Cape Town Warehouse tender	✉
001 - Computer and Office supplies City of Sydney	
001 - Crane tender Fremantle	
001 - Crane tender Port Botany	
001 - Stationary and supplies for Cape Town City	🔒
0011 1 - Labour hire City of Sydney	✉ 🔒
0013 - Consulting services City of Sydney	🔒
0014 - Computer and IT supplies Dubai	🔒
0015 - Network infrastructure Port Botany	
00152 - Network infrastructure Port Botany	

1 2 3 4 5 6 7 8 9 10 ...

Key points

- The history of all proposals is available immediately, and this according to research criteria (Name, date of publication, open / closed, won / lost ...)
- Icons indicate a mail or something requiring action

Management analysis



Key points

- A reporting tool allows users to create customized reports
- Ex 1: Estimated value of contracts in preparation, submission, negotiation, won
- EX 2: Contracts awarded / won by product type

A turnkey solution

For a successful implementation



- Installation on a server provided by the customer
- Hosting in our Data Center (optional)
- Setup, configuration on site

- Licensed by concurrent user count
- Maintenance contract renewable annually

- Administrator training
- User training
- Provision of support (documentation)
- Web and hotline support

Current users

HYSTER
ABB
MITSUBISHI CORPORATION
MITSUI ENGINEERING & SHIPBUILDING
BROMMA
BUISCAR CARGO SOLUTIONS
CLARK
FERRARI
FELS CRANES
KALMAR INDUSTRIES
LIEBHERR
KONE CRANES
FANTUZZI REGGIANE
CAPACITY
LINDE
NOELL MOBILE SYSTEMS
RAM SPREADERS
GAUSSIN
GOTTWALD PORT TECHNOLOGIES
DP WORLD
PACECO ESPANA
STINIS HOLLAND
TERBERG
MAGNUM TRAILERS
ZPMC



LIEBHERR



The benefits of iSpec solutions

For simplified tender, bid, contract and project data management

1 100% Web solution ideal for geographically dispersed teams

2 Central document library

3 Managed models increase productivity

4 Precise management of user rights and permissions

5 Management of significant volumes

6 Managing of time constraints

7 Advanced reporting

8 Intuitive and scalable solution

9 Improved ISO compliance

Case studies

Benefits and savings

1 Reduced tender, bid, contract management costs up to 60%

2 Improved productivity - up to 70%

3 Reduced project cost - 3%-20%

4 Total procedural compliance - minimal human errors

5 Sharing of expertise across the enterprise

6 Identification of bottlenecks and problems - KPI

7 Management reports up to the minute

8 Improved vendor relations

9 Reduced auditing and consulting costs