Process Matters
etegri

DATA SHEET

CLOUD-BASED BID EVENT PLATFORM

Etegri is an end-to-end solution for running procurement bid events. Whether you are running an RFQ, RFP, RFI, ITT, RFI, or any other bid-response event, Etegri is the most effective and efficient platform you can use. The most comprehensive system of its kind, it is also the easiest to use for the bid team and vendors.

YOUR ETEGRI SITE

- Internal Administrative hierarchy - Assign User Privileges
  - o Administration / Consultant – full access
  - o Buyer / Consultant – bid opportunity only
  - o Buyer / Consultant – read only
- Dedicated custom branded landing page
- Training for Purchasing Staff
- Additional training to Train the Trainer
- Vendor "How to Use" webinar
- Languages
  - o English
  - o French
- Online help guides and videos for Administrators and Vendors

STRUCTURE AND SECURITY

- Hosted "Cloud Solution"; no software to manage
- Administrators and Vendors can access bid events anywhere they have access to the Internet with their secure access login
- Password 'reset' function eliminates nuisance (time consuming) calls
- Servers in a secure, PCI DCC compliant datacenter
- 3rd party, off-site backup of all responses and documents

EVALUATION

- Results available to Bid Administration the instant the bid event closes
- Invite evaluation team to review
- Fully tabulated
- View on-screen as summary report
- View all submissions as a group
- View each submission individually
- Post bid and/or award results to site on your schedule; notifies vendors
- Download instantly as spreadsheet – Eliminates any chance of transposition errors
- Print or save-as PDF for archiving

REPORTING

- Audit Trail captures all event activity
  - o Logs:
    - Documents/Addenda uploaded
    - Documents/Addenda viewed or downloaded
    - Email history, providing Success / Fail report
    - User log-on and navigation
    - Questions submitted & answered
    - All communications
  - o All actions date and time stamped
  - o Standard and Ad Hoc Reports for Buyers and Administrators

BID EVENT MANAGEMENT

Event Details

- Open / Public Bids; Your Bid Event available to the general public
  - Opportunity displayed on Etegri.com, and/or your Website
  - Construction bids may be mirrored in Association Planrooms (Canada only)
- Private / Invite Only Bids; Only venders you Invite have access
- Summary Page allows Description / Comments / Site Visit Requirements etc.
- Monitor participants
  - List of document takers
  - Status of responses in real time

Document Posting

- File Manager tool provides simple 'Drag & Drop' process
  - Upload process retains existing file structure
  - Posting additional documents such as addenda automatically notifies Registered Respondents
  - Offers flexibility to modify document attributes, IE: title, sort order

Bid Response Form

- Supports both Sealed and Open/Unsealed Bids
- Establish Bid Bond requirements
- Save your Response forms as templates for future use and modifications
- FlexForm Questions – receive vendor answers in the exact format you require
  - Enter directly or use Import Wizard from spreadsheet
  - Question Types
    - Numeric – numbers only
    - Text (Character limit per question)
    - Multiple Choice – one answer – select one
    - Multiple Choice – multiple answers – select all that apply
    - Price – $-dollar format
    - Yes/No – when 'maybe' isn't an answer
    - Date – standard formatting from all respondents
    - List – great for qualifications, locations etc.
    - Attachments (up to 21 MB each)
    - No Answer – Useful for instructions or commentary

- Price Options
  - Stipulated sums
  - Alternate
  - Separate
  - Combined
  - Unit
  - Cash allowances
  - Custom prices –
    - Allows for prices to be entered into custom categories to keep form organized
    - Optional management of Quantity and Unit of Measurement "sq.ft, lbs, liter, each etc."
    - Enter directly or use Import Wizard from spreadsheet
- Customizable Clauses
  - Currency
  - Taxes
  - Addenda acknowledgment
  - Completion time
  - Terms and Conditions

Event Integrity

- Bidding Rules
  - Computer enforced
  - No exceptions allowed
- Error Checking & Compliance
  - Price and Numeric fields must contain numeric data only
  - Price fields offer a 'hover' feature to display dollar value in text format to confirm amount
  - Text fields have character limit
  - Fields marked as mandatory cannot be empty and must contain the proper type of data
- Simultaneous uniform communications with all Registered Respondents
- Closing Countdown Clock
  - Synchronized clock on all forms and webpages
- Questions cannot be modified by respondents
- Admin can set option to allow Vendor suggested "Alternates"
- Authorized Digital Signatures
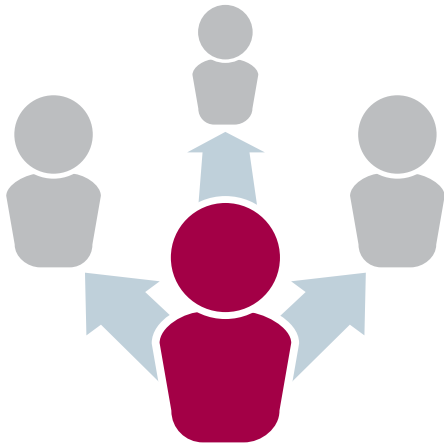 - Legally binding with Patented 3-step Verification procedure

- System generated messages for standard activities
- Automatic simultaneous email notification to all Registered Respondents – IE: Addenda

Vendor Management
- Create custom Qualification / Registration forms
- Track Vendor Qualifications – Insured, experience, bondable etc.
- Request Vendor Classification - GSIN Commodity Codes, MBE, WBE, DBE etc.
- Vendor classification search tools
- Automated Renewal Date notification
- Vendor Profile Grouping

- Questions & Answers
  - o Handled like an email thread
  - o Fully searchable
  - o Date & time stamped
  - o Public
    - ▪ Respondent is optionally anonymous
    - ▪ Answers can be published in real time or released in a batch
    - ▪ Simultaneous email notification to all Respondents in real time when answer added/released
  - o Private
    - ▪ Reply sent only to inquirer and not available to other Respondents

Communication Management
- Address Books (Searchable and filterable)
  - o Private – Import your existing contacts and/or add new contacts via vendor registration
    - ▪ Organize into categories and groups
  - o Public – vendors registered with Etegri
    - ▪ View qualifications, commodity codes etc.
- Mail Center
  - o Templates – Includes merge fields for customizing correspondence
  - o Rotational roster – System automatically assembles invite list maintaining fairness for vendors
  - o Groups – Expedite your correspondence sending to your established 'groups'

VENDOR EXPERIENCE

System Use

- Preview Bid Opportunity details without having to register or log on
- Vendor's private dashboard displays all Favorited and Invited bid opportunities for 1-click access
- Vendors are notified via daily email of new and updated public opportunities matching their classification, commodity codes, geography and scope of work

Online Response

- Simple, fill-in-the-blank or check-box responses
  - o Clear direction on how to answer
  - o Response returned in the desired format
- Automatic sum of unit price based on price and quantity
- Errors and omissions listed for correction before leaving page and again before submission accepted
- Responses received via the Etegri platform
  - o Response form draft becomes submission when Submit button clicked
- Zero time lag for submissions
- System saves submission information as vendor proceeds through the form
- Can make changes to submitted response until the opportunity closes
- Vendor receives email confirmation of submission and withdrawals
- Submission remains in vendors "History" file
- Bid Bond Processing
  - o Integrated process for requesting and receiving bonds from brokers
  - o Legally binding digital signoff by both broker and vendor

1-click

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The Easiest, Most Comprehensive Bid Event Platform Available!