

USER GUIDE

CANS Online Bidding System for Trade Contractors

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OVERVIEW

The CANS Online Bidding System for Trade Contractors is a tool used by Trade Contractors to submit bids to General Contractors electronically through the CANSnet system.

The goal of this system is to streamline the bidding process while improving access, efficiency and transparency.



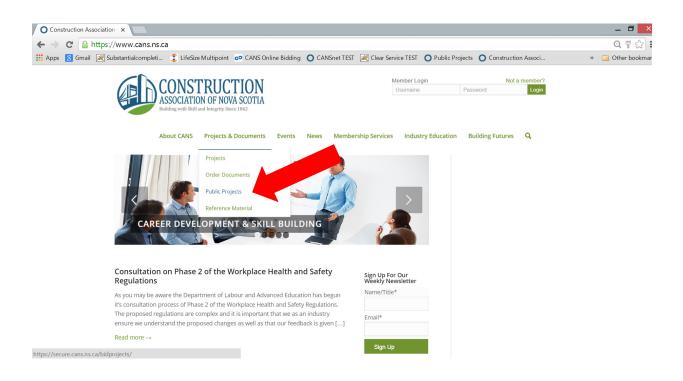
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There are two ways to access the bidding module through CANSnet. Non-members would access using the following steps:

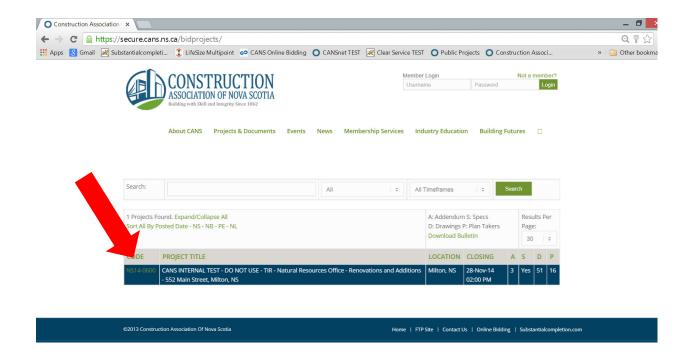
In the 'Projects & Documents' drop down choose 'Public Projects' - a menu of all projects offered for bidding online.

The 'Public Projects' section provides the basic project details as well as the access point to the bid module.



Once you have clicked the Public Projects section you will be brought to a menu of all available projects for online bidding.

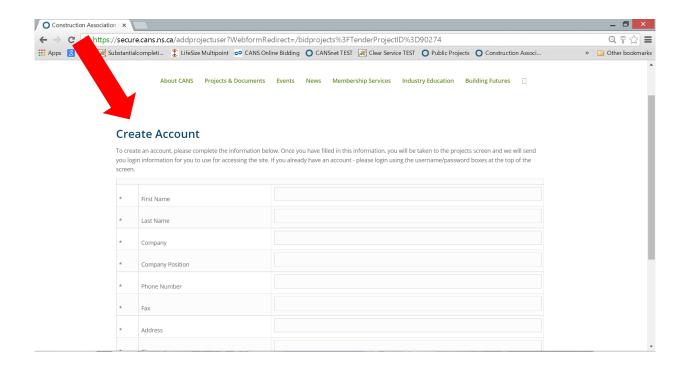
Click on the project number to enter the project of interest for details and access to the bid module.



At this point you will be prompted to fill in basic information which the system will use for your bidding account.

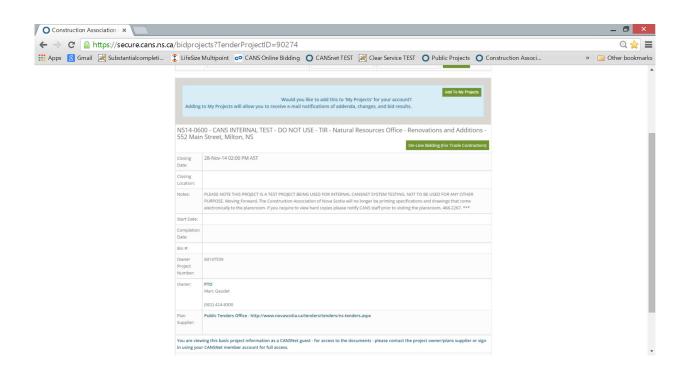
Fill out the fields provided carefully and hit the green 'Submit' button at the bottom of the page to proceed.

You will receive an email notification with your user credentials for future use.



Once your account has been created you will be taken to the Project Information page which will provide you details such as Project Title, Closing Date, Owner Information, etc.

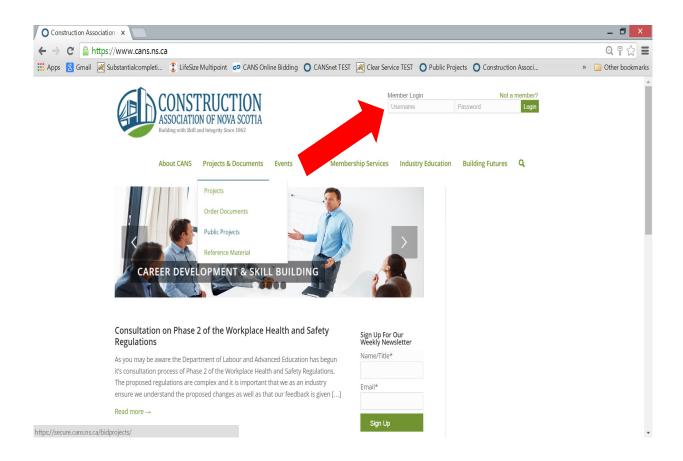
As a Public User you will see a disclaimer at the bottom letting you know to access the Project Documents (Specs and Drawings) you will need to contact the Owner.



ACCESSING THE SYSTEM: CANS MEMBER

To access the system as a CANS Member, use the following steps:

Enter your login information at the top right corner of your window.

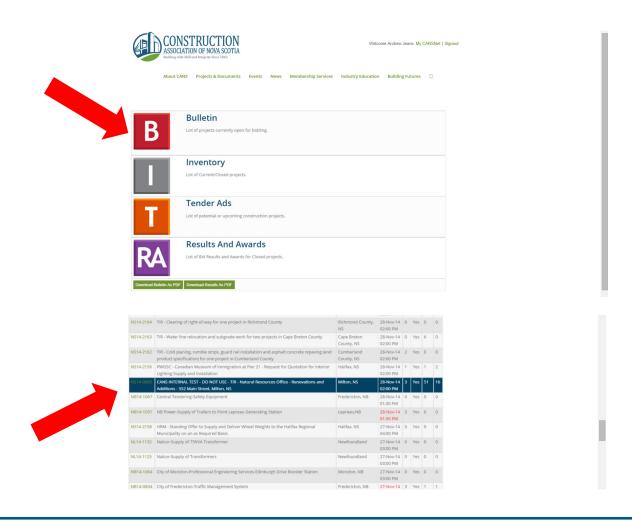


ACCESSING THE SYSTEM: CANS MEMBER

Once you have signed in you will be brought to the main Projects screen. To locate projects open for online bidding, click on 'Bulletin' and search for projects.

Projects available to bid online will be identified with a blue bar.

Click the project number to enter the project where you will find all information, including Specifications and Drawings.

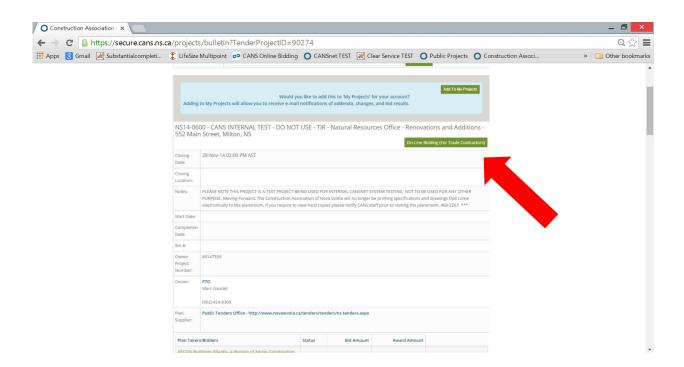




ACCESSING THE BID MODULE

At this point, both CANS Members and Public Users will see a similar screen.

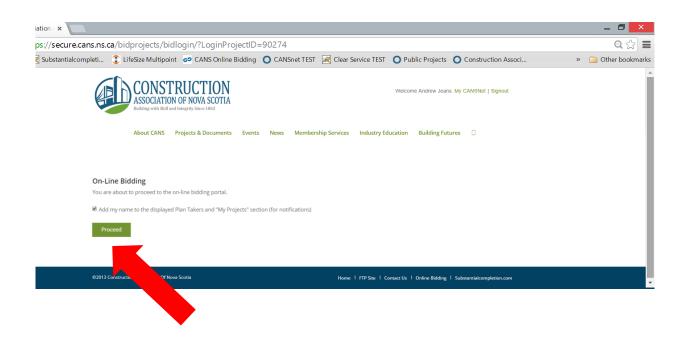
To move into the bidding module, all users will need to click the 'Online Bidding for Trade Contractors' green button located just below the project title.



ACCESSING THE BID MODULE

A notice will indicate that you are about to proceed into the bid module, and that the CANSnet system will be adding your name to the Plan Takers list and adding this project to your 'My Projects' section. This is important as it will ensure you receive email notification of addenda and changes to the project.

Leave the box checked and click the green 'Proceed' button.

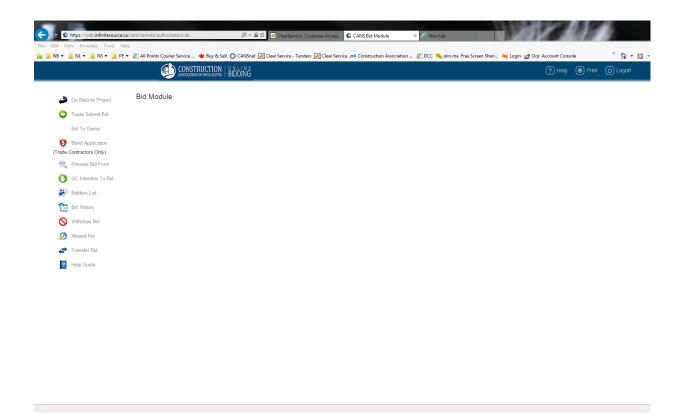


MAIN PAGE MODULE

This is the main page of the bid module which will allow you to complete all online bidding steps.

At any time if you need to go back to the Project Information page click 'Go Back to Project' found in the top left corner.

Project icons are listed on the left side of the page. To find out what any icon is used for you can hover your mouse over it and a description will appear.

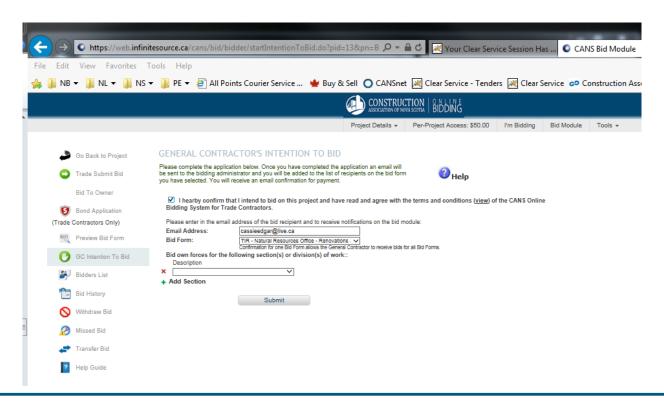


GENERAL CONTRACTOR INTENTION TO BID

If you are a General Contractor wishing to have Trade Contractors bid to you, click the GC Intention to Bid icon.

You will be prompted to fill out the intention to bid form. First check the box to confirm you intend to bid. Your email address will pull automatically from the information you entered previously as a Public User, or from your CANSnet profile.

If you choose to bid Own Forces, choose the division from the drop down menu before clicking Submit. You will need to complete an authentication process the first time you use the system (see page 21). You will also be required to pay a fee as outlined in the rules.





TRADE CONTRACTOR BOND APPLICATION

We recommend that Trade Contractors start the bidding process by visiting the Bond Application page by clicking "Bond Application" on the left. Complete the bonding form. All mandatory fields are yellow.

You will notice the Bond Status bar throughout the entire bidding process. The status will change as bonds become submitted, approved, and signed. You will receive email notifications for each step.

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TRADE CONTRACTOR BOND APPLICATION

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Once the form is complete enter your Bonding Agent's email address to send the application electronically. You will notice a checkbox asking if you are an authorized signatory for bonds. Check the box that applies and click save. Once sent, Bond Status will change to show as Bond Submitted.

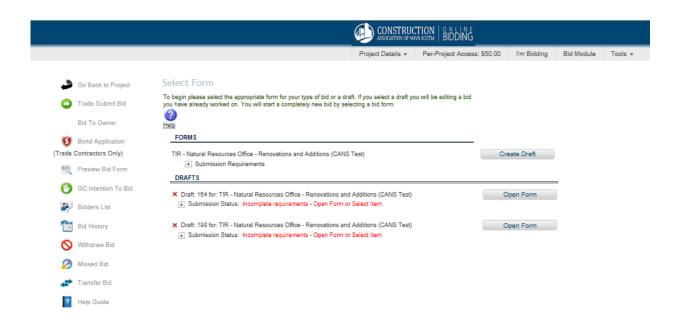
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	Project Details ▼ Per-Project Access: \$50.00 I'm Bidding Bid Module Tools	·
	,	
Go Back to Project	BONDING FORM	
Trade Submit Bid	 Please complete the application below. Once you have completed the application, enter in the email address of your bonding company. Once your bonding company has completed your request by issuing you a bond, you will receive an email and will be able to attach your bond to 	
Bid To Owner	the bid(s) that you are submitting on this project. 4. We recommend that you contact your bonding agent by phone as well to ensure they have received your application or need additional information.	
Bond Application	Bond Application *required fields	
(Trade Contractors Only)	BOND STATUS: Application Submitted * Bid Closing Date: 2015-Feb-19 31	
Preview Bid Form	* Bid Closing Time: (HH:mm le: 1030)	
GC Intention To Bid	*Obligee: Successful General Contractor(For Trade Contractor bidding only)	
Bidders List	Successful General Contractor	
Bid History	*Bid Bond: 10 % Consent: ○ Yes No	
iii Bid History	Acceptance Period: 0 days	
Withdraw Bid	Performance Bond: ○Yes ® No 0 %	
Missed Bid	Labour & Material: Oyes ● No 0 %	
	Maintenance: ○ Yes ● No □ % *Bond Form: ● CCCC	
Transfer Bid	"Estimated Bid: \$100,000,00 Include Taxes: O Yes No	
? Help Guide	Work On Hand:	
	Holdback: O Yes ® No □ %	
	Does the work contain any Design Responsibilities?	
	O Yes No If Yes, Please Provide Details ∧	
	V	
	Hazardous Waste Removal/Environmental Clean Up? ○ Yes ® No If Yes, Please Provide Details	
	*Time for Completion:	
	16 weeks	
	Maintenance Period:	
	Penalties/Liquated Damages for Late Completion:	
	Remarks/Conditions:	
	○	
	Please enter the email address of your bonding company or risk management representative below and click on 'Submit Application' to send an email that will allow the bonding company or risk management representative to issue you a	
	bond. Send Bond Application to -> Email Address: trye@stanhopesimpson.com	
	I, Cassandra Melody, am authorized to sign the bond and will be signing this bond on behalf of my organization. - You will be required to verify your digital signature prior to signing the bond.	
	I. Cassandra Melody, am NOT authorized to sign the bond Enter the email address of your organization's authorized bond signatory. Email Address:	
	Save Re-Submit Application	

TRADE CONTRACTOR SUBMIT BID

To submit your bid, begin by clicking the Trade Submit Bid icon.

You will be prompted to select a form to work from. To create a new draft, click 'Create Draft' (listed under forms).

To work from an existing draft click 'Open Form' next to the draft you wish to work from (listed under drafts).

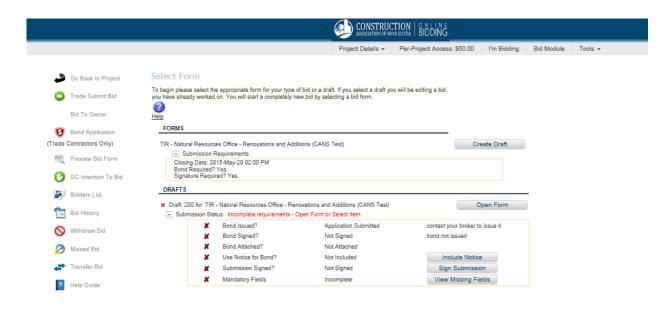


SUBMISSION REQUIREMENTS & SUBMISSION STATUS CHECKLIST

Under the FORMS section, there is a menu that displays submission requirements for the project. To display or hide this information, click the box next to Submission Requirements.

Under each draft in the DRAFTS section, there is a submission status that shows what steps in the bidding process have been complete. To display or hide this information, click the box next to Submission Status.

Completed steps will display a green check mark, while incomplete steps will display a red X.



TRADE CONTRACTOR SUBMIT BID: USER AGREEMENT

To submit your bid you must agree to the Rules provided.

Check the box that says "I have read and agree to the above terms & conditions" and click accept to proceed.





TRADE CONTRACTOR SUBMIT BID: BIDDER INFORMATION

The next step in the process will be to verify the Bidder Information. This information is pulled from either:

- The submission provided by Public Users through the Public Projects section (outlined on page 6).
- Pulled directly from a CANS Member's profile information in CANSnet.

Click 'Save and Proceed' when complete.

To proceed, you must acknowledge that you are the authorized signatory or enter the email address of the authorized signatory.

If you are the authorized signatory and it is your first time using the system, you will be required to verify your digital signature. To do so, follow the steps under "Click here to verify your digital signature." For more information on Bidder Authorization steps, see pages 21-22 of this guide.

... Continued on next page.

TRADE CONTRACTOR SUBMIT BID: BIDDER INFORMATION

... Continued from previous page.

If you enter the email of the authorized signatory, an email will be sent to them with a secure link to sign the submission once you click "Send Email."

Select the appropriate box and click Save & Proceed.

ONLINE BID		
	➤ GO TO select a page ▼	
Bidder Information	* required fields	
of the authorized signer. If yo	ou are the authorized signatory or enter the email addres ou enter in the email of the authorized signer, an email wi for them to sign the bid when you click "Save & Proceed."	
*Name of Bidding Firm:	Construction Association of Nova Scotia	
*Address:	260 Brownlow Avenue	
*City:	Dartmouth	
*Postal Code:	B3B 1V9	
*Province:	NS Nova Scotia ▼	
*Country:	Canada ▼	
*Telephone:	902 4682267	
Fax:	902 4682470	
*Email Address:	melody@cans.ns.ca	
*Name of Contact Person:	Melody Hillman	
✓ I am an authorized sign	gnatory of the bidder and I am authorized to submit this b	
I am not authorized. Enter th	ne email address of your organization's authorized bid sign	
	Previous Save & Proceed	



TRADE CONTRACTOR SUBMIT BID: BIDDER AUTHORIZATION

At this point you will be required to complete a three step authorization for security reasons: you will be sent an email verification code, will be phoned with a second code to enter, and will be verified by credit card information provided.

If you wish to adjust either the email or phone number listed click the red Click Here link. It is recommended you have the phone code call go to a direct line or cell phone.

Once your codes are entered you will be brought to the Authorization Complete screen which gives you your authorization number. Please keep this number on file for future bidding.

There is a cost of \$40 for 2 months of authorization, or \$150 for a year

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TRADE CONTRACTOR SUBMIT BID: BIDDER AUTHORIZATION

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Authorization Check

Verification sent

Email Verification

A verification code has been sent to the following Email Address: dfaulkner@infinitesource.com Please enter the code below. If you have not yet received the email, please check your junk and spam folders.

Email Key: F852F36 Submit

Phone Verification

A verification code will be provided to you via an automated phone call at the following number: (778) 834-7228Please enter the code below.

Phone Key: 832 Submit

If any of the above contact information is incorrect, you may modify it by Clicking Here.

If you do not receive a confirmation phone call and email in 5 minutes, **click here** to Resend Verification.

Authorization Complete

Your Authorization is now active and you may access any Online Bid Module using your unique Number.

AUTHORIZATION NUMBER: 480F8 - 593B5 - 872C1 - C321C Keep this number in a safe location

Your Authorization expires on August 05, 2011

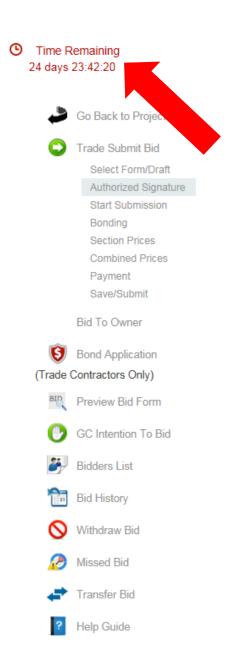
Return to Project



COUNTDOWN TIMER

You will see a time remaining clock on the side menu in Trade Submit Bid.

The time remaining clock ticks down to closing and is the same for all users.

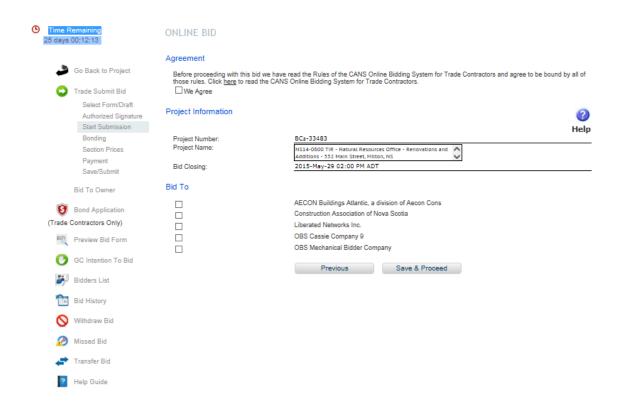


TRADE CONTRACTOR SUBMIT BID: PROJECT INFORMATION PAGE

This is the main project page listing all high level details.

To submit your bid you must agree to the Rules provided, review the general Project Information including the project name and trade bid closing date.

Choose which General Contractors you would like to bid to by checking their company. You can bid to any or all, and you can create separate drafts for each should you choose. Click 'Save & Proceed.'



TRADE CONTRACTOR SUBMIT BID: BONDING

The next page is the Bonding page. You will see the same 'Bonding Status' bar that was in the Bond Application, tracking the status of your bond.

If you are bidding below the threshold set out you have the option to Issue Notice. For any bid higher than the threshold you will need to attach your bond.

To be able to attach your bond you will need to have received the bond back from your bonding agent with their digital signature applied as well as the surety seal. Once that is complete you can add your digital signature to the bond by clicking 'Sign Bond'

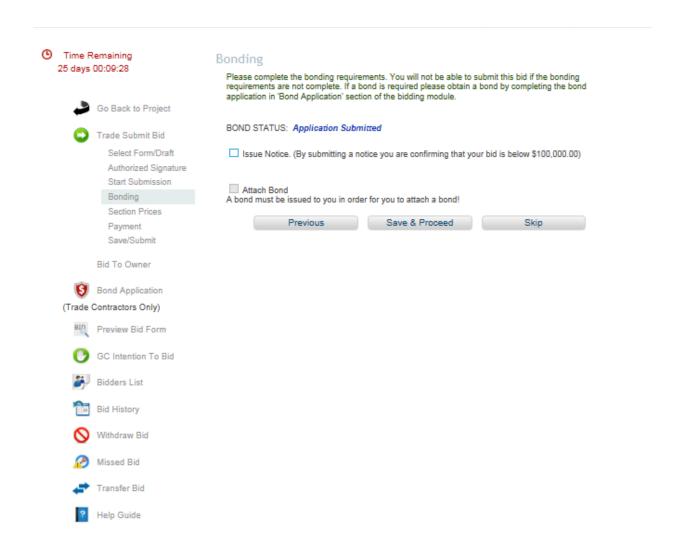
... Continue on next page.

TRADE CONTRACTOR SUBMIT BID: BONDING

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Make sure the 'Attach Bond' box is clicked and click 'Save & Proceed.'

Note: You are able to skip this step at this stage, but it will need to be fully completed prior to submission of the Bid.

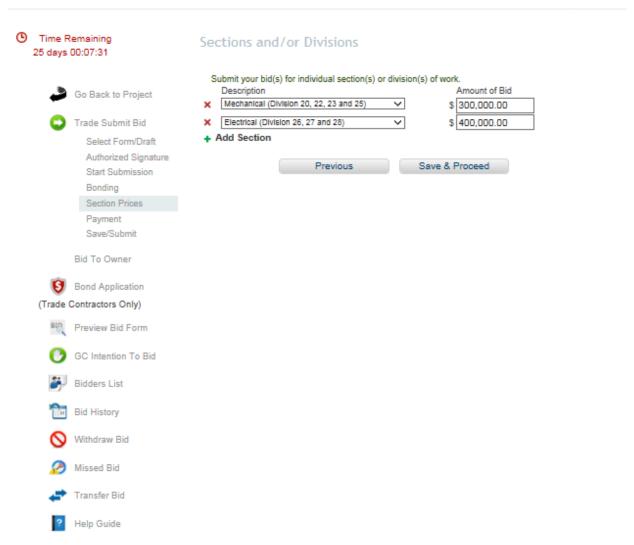


TRADE CONTRACTOR SUBMIT BID: SECTIONS AND/OR DIVISIONS

The next page is the Sections & Divisions page. Using the drop downs you can select all the divisions you wish to bid, and enter your bid amount. Continue choosing 'Add Section' until all the desired sections and amounts are listed.

If bidding multiple divisions, you will have the opportunity to submit a Combined Price on the next screen.

Click 'Save and Proceed.'



TRADE CONTRACTOR SUBMIT BID: COMBINED PRICE

Using the drop downs, choose the sections you would like included in your Combined Price and the amount.

Click 'Save and Proceed' when complete.

O	Time Remaining 25 days 00:08:17	Combined Price(s)
	Go Back to Project	Enter the combined price(s) that you are offering. You must select each section that you are adding as part of your combined price by selecting 'Add Section.' X Combined Price #1:
	Trade Submit Bid Select Form/Draft Authorized Signature Start Submission Bonding Section Prices Combined Prices Payment Save/Submit Bid To Owner Bond Application (Trade Contractors Only) Bun Preview Bid Form Combined Prices Combined Prices Combined Prices Combined Prices Payment Save/Submit Bid To Owner Solution Bun Preview Bid Form Combined Contractors Only) Withdraw Bid Siders List Signature Save/Submit Save/Submi	x Combined Price #1: Amount of Bid:
	? Help Guide	

TRADE CONTRACTOR SUBMIT BID: ALTERNATIVE AND UNIT PRICES

In certain cases there may be a need to enter Alternative Pricing and Unit Pricing. These would take place following the Combined Price screen.

Click 'Save and Proceed' when complete.

AlternativePrices					
	* required fields				
Enter the alternative prices(s) that you are offering:					
*Section/Division:	Wall and Ceiling Systems ▼				
*Alternative Price:	(Deduct) Refrigerated Storage 178/179				
	//				
*Amount:	\$				
*Section/Division:	Aluminum Windows, Doors and Glazing ▼				
*Alternative Price:	(Deduct) Refrig Storage 178/179				
	//				
*Cookies/Division					
*Section/Division: *Alternative Price:	Electrical ▼ (Deduct) Refrig Stor 178/179				
Alternative Friedr	(Deduct) Reling Stor 176/179				
	//				
*Amount:	\$				
*Section/Division:	Electrical T				
*Unit Price:	Fixture Type F3				
Quantity:	1.0 Unit: Each				
	\$ Add to base bid				
*Amount:	Deduct from base bid No Change				
Total Price:	\$				
*Section/Division:	Electrical				
*Unit Price:	Fixture Type F6				
Quantity:	1.0 Unit: Each				
	\$ Add to base bid				
*Amount:	Deduct from base bid No Change				
Total Price:	\$				
	Previous Save & Proceed				



TRADE CONTRACTOR SUBMIT BID: CASH ALLOWANCES

In certain cases there may be a need to enter Cash Allowances or Other Stipulated Sums. These would take place following the Combined Price or Alternative Pricing screen depending on the project specifics.

Click 'Save and Proceed' when complete.



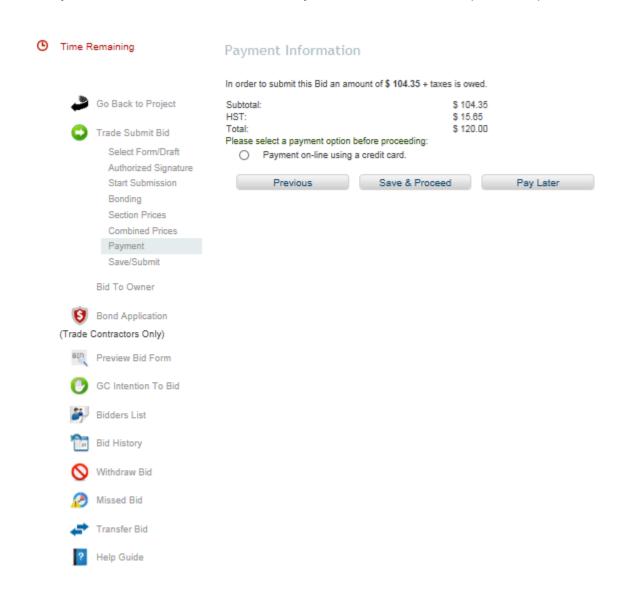


TRADE CONTRACTOR SUBMIT BID: PAYMENT

You will now be asked to submit payment for your bid. You can pay using a credit card.

Click 'Save and Proceed' when complete.

If you wish, select 'Pay Later' to skip this step until a later time. Please note that you will not be able to submit your bid until this step is complete.



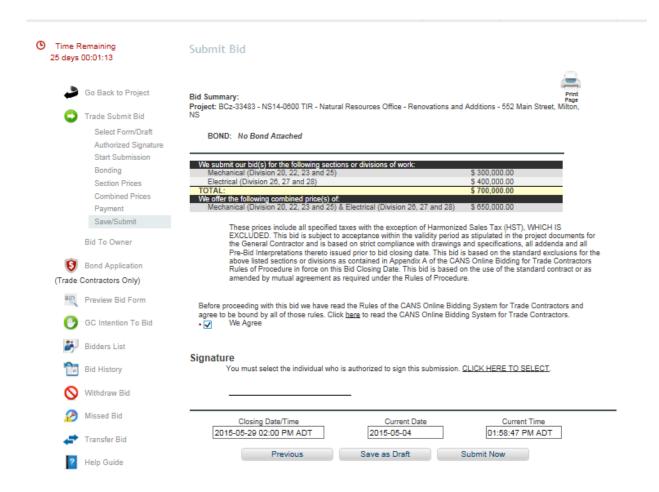


TRADE CONTRACTOR SUBMIT BID: SUBMIT BID PAGE

The Submit Bid Page summarizes all steps taken to arrive at the end of the bidding process. Review this information, agree to the Rules of the system.

You may choose to Save As a Draft (for submitting at a later time or transferring to another user) or to Submit Now.

Note: You will be unable to submit your bid fully if you have not completed the necessary steps to do so (i.e. pay for bid, attach letter/bond, be an authorized signatory, click submit bid now, etc.)





TRADE CONTRACTOR SUBMIT BID: BID CONFIRMATION

This screen lets you know you have successfully completed your bid. It also lets you know that you are able to withdraw your bid using the 'Withdraw' icon as well lets you know you are able to view your submitted bids by clicking the 'Bid History' icon.

Click 'Accept & Close' to return to the main Bid Module screen.

Bid Confirmation

You have successfully submitted your bid. You may edit and re-submit your bid prior to Bid Closing utilizing the "Withdraw Bid " tool. The "Bid History" tool will allow you to view your submitted bids.



Accept & Close



MAIN BID MODULE PAGE: OTHER ICONS

Preview Bid: Preview bid form content prior to it being available for bidding.

Bidders List: A list of Trade Contractors and which divisions they have bid. Released by the Administrator after closing. No price information will be displayed.

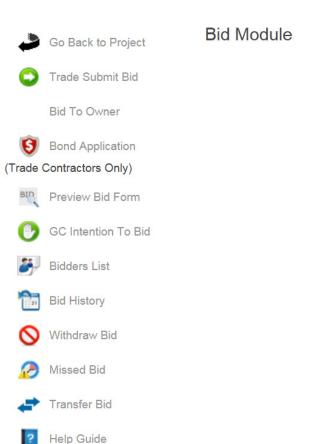
Withdraw Bid: Withdraw bids at any time prior to closing.

Missed Bid: Trade Contractor may bid to a General they missed bidding to up to 24 hours after closing. May only use a previously created draft, not a new form.

Transfer Bid: Transfer bids within users from your company.

Help Guide: Where help documents are stored for user reference.







CONTACT INFORMATION FOR ASSISTANCE

FAQ Document:

http://www.cans.ns.ca/online-bidding/

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