**Tender Specification**

1. Overview

As the business grows within HS2 Ltd there is a need to increase document control resource(s) to provide support across the organisation. Document control is very much task geared to demand which will fluctuate to support time based programme deliverables.

HS2 Ltd therefore requires a document control resource service that can support demand over four main packages of work (as detailed below).

The technology systems that we use in HS2 Ltd for document management are [Bentley Enterprise Bridge (eB),](http://www.bentley.com/en-GB/Products/eB%2BInsight%2BServices/) and [Bentley ProjectWise](http://www.bentley.com/en-GB/Products/projectwise%2Bproject%2Bteam%2Bcollaboration/).

1. Specification

The Supplier shall be required to provide resource, skills and knowledge to deliver a multi-functional document control service across HS2 Ltd and the resource provided must have the following skills and experience in document management:

* Sound knowledge of document management standards, processes and procedures;
* Excellent working knowledge of eB, ProjectWise, and SharePoint;
* Expertise of documentation processes within an engineering and construction environment and a knowledge of a typical project life;
* Working knowledge of bulk scanning, scanning systems and PDF functionality;
* Literacy in Microsoft Software systems (Word, Excel, PowerPoint); and
* Excellent written and verbal communication skills.

It is expected that each package will require one full time resource for a period of one year commencing from 17th August 2015 to 16th August 2016. If an unforeseen surge in work activity happens within HS2 then the supplier should have the flexibility and capacity for HS2 to call for additional resource.

Three of the work streams for document management has approximately 9000 deliverable documents and 1 work stream of approximately 11000 deliverable documents:

* Employees requirements design deliverables for Area North (9000);
* Employees requirements design deliverables for Area Central (9000);
* Employees requirements design deliverables for Area South (9000); and
* Phase 2a (11000).

To deliver the multi-functional document control the resource shall on a daily basis undertake the following activities:

* Maintain entries in the Electronic Data Management Systems (EDMS), scan, file, and archive project documents in accordance with HS2 Ltd document management controls, standards, processes and procedures;
* Ensure that meta data and information in the company EDMS is correct, complete, and up-to-date;
* Advising departments on how to manage document lifecycles to ensure that there is a clear audit trail of how documents are approved;
* Retrieve project records and files from the archives and the EDMS;
* Ensuring sensitive and confidential information is stored appropriately;
* Check the quality of how deliverable documents have been submitted;
* Provide reports and management information in response to requests from the business for information;
* Supporting and guiding the business with the implementation of document management within their teams;
* Processing document control e-mail inbox requests and tasks within agreed timescales; and
* Train both staff and tier one contractors in the use of the EDMS, this will include formal class room training, team support mentoring and individual training.
1. Resource Management

It is expected that the resource(s) will be full time and a review of time spent will be undertaken on a monthly basis. This will be in the form of an approved timesheet signed off by a member of HS2 Ltd. An invoice shall be submitted by the organisation on a monthly basis clearly stating the purchase order assigned to this service requirement.

1. Timetable for service activities

| **Key Deliverables** | **Method** | **Delivered by or Frequency** |
| --- | --- | --- |
| Attend meetings on site to discuss on service issues as required by HS2 Ltd. | On site, video conference, or telephone conference | As and when required |
| Provide monthly invoices with approved timesheets. | E-mail | Monthly |