

G. JAMES

Glass and Aluminium

# Case Study

# The Client...

## G. James Glass & Aluminium

The origin of the G.James Group of Companies began in 1913 when an enterprising George James arrived in Australia after migrating from England. After working for various building related companies in Brisbane, George decided to use his skills as a glazier, along with his knowledge of sales and purchasing, to establish G.James Glass Merchants at West End (Brisbane) in 1917. Today the G.James Group of Companies is involved in the manufacture, fabrication, processing and installation of a diverse range of products and is Australia's leading integrated glass & aluminium manufacturer and contractor.

G.James remains a privately owned family group of companies comprised of several divisions, responsible for servicing not only the needs of other divisions within the group but also their own specialised markets. It is this extensive and integrated business structure that provides G.James with its unique position within the glass and aluminium industry.

“Squiz has provided G.James with a flexible content management system to ensure our Intranet continues to successfully meet the changing needs of our business; without having to resort to new software. The sales department is happy, the customers are happy, the board is happy.”

**Jaco Roeloffs**

Intranet Web Programmer  
Information Technology Department,  
G. James Glass and Aluminium

# The Challenge...

## Develop an electronic tendering system

**An integral part of the G.James sales process involves producing quotes and estimations when tendering on new building projects. In the past, each branch and their team of estimators ran their own paper based tender process with unintended consequences including:**

- Wasted time using large and impractical PDF that could not be saved easily or resumed; word processor templates could not consistently enforce G.James policies to be included in tender documentation.
- An inconsistent corporate look and feel evolved over time between divisions and branches.
- A considerable amount of paper was wasted when printing, faxing and copying tenders.
- Duplication of effort when estimators from neighbouring branches tendered on the same building project.
- The absence of a central database for building projects and tenders meant that “potential sales” data could not be collected effectively

**To resolve these issues, the G.James IT Department had to develop an electronic tendering system that would:**

- Maintain all building projects and associated tenders in a central database utilising the existing Squiz Matrix and Oracle eBusiness Suite
- Create a flexible form that will allow for estimators to easily create a new tender and exit or resume work at any point in time.
- Provide an easy to use single web-based management interface (without resorting to new software) to assist estimators to organise, complete and submit tenders on building projects Australia wide.
- Create and format tender documents on the fly for email, pdf or paper without the need for custom branded print stock.
- Develop reports that would provide the board with an insight into potential business at any point in time.



## Application Home

- The application homepage provides a clear overview of current and complete work for the user and the users' branch. The single page interface loads project and tender data asynchronously on an individual, branch and company level. Users can easily browse and edit their own work as well as that of their colleagues if required.
- Building projects can be registered here with or without the use of the Custom Form developed for the Tender System. This allows for all divisions to be included in the potential business reporting, this may occur when certain tenders are complex and large in the case of monumental highrise projects
- The application allows for projects and related tender documents to be moved and reallocated between branches and divisions
- Users can search the entire company project database in real-time before creating new projects and tenders in the system.
- New building projects can be registered by administrative staff from any G.James location; the data will automatically enter the system, and for a specific branch, based on the location details entered.

# The Solution...

## Web Application Development with MySource Matrix

Leveraging the existing Squiz Matrix implementation already delivering G.James' Intranet system. The G.James' IT Department commenced development of the electronic tendering system, solely by utilising in-house skills and out of the box MySource Matrix functionality.

What G.James created was the "Tender System", a fully browser based tendering system that utilised the same Intranet login access that sales estimators were used to. The system was developed without the need for any additional software.

Squiz Matrix JavaScript API asset was key to providing dynamic and intuitive interface for projects and tender documents "in progress" and "complete". A company-wide "project register" keyword search was made available for estimators to check if tenders existed on building projects.

Using the Multipage Custom Form functionality in Squiz Matrix, the IT Department started by building an online form to guide estimators through the process of creating, resuming and submitting tenders. The built-in email functionality of Custom Forms kept estimators informed when tenders are due or about to expire.

The IT Department successfully configured a single Multipage Custom Form asset to accommodate all the various divisions at G.James. Enabling each division to set up “template” forms; this allows for the managers to decide which sections and clauses are set as included, excluded or mandatory. Thereby guiding estimators, and enforcing important terms stated in the tender documents that are presented to the customer.

A Squiz Matrix design was created to ensure all tender documents consistently represented G.James both on plain paper for printing and when faxing. The data source asset was leveraged to pre-fill form fields for branch details and debtor records directly from the Oracle eBusiness Suite.

By combining Squiz Matrix Asset Listings with JavaScript to plot visuals, the Tender System generates onscreen and print reports including the Company and Branch Status Reports.

## Tender Form

Logged in as: Greg Taylor - Gold Coast - 0006 | Wed, 13th October 2010 | Administration

Step 1 G.James & Builder Details	Step 2 Extent of Work & Ref Docs	Step 3 Inclusions & exclusions	Step 4 Edit Inc/Excl	Step 5 Qualifications	Step 6 Edit Qualifications	Step 7 Terms & Conditions
Save in Progress....						

### Contract (13)

sort

<input checked="" type="checkbox"/> Based on standard QMBA or HIA or Australian Standards contract documents.
<input checked="" type="checkbox"/> No retention held on project.
<input checked="" type="checkbox"/> Cash Retention.
<input checked="" type="checkbox"/> Shop Drawings.
<input checked="" type="checkbox"/> Site Allowance of \$(## \$/hr ##)/hr.
<input checked="" type="checkbox"/> Income Protection Insurance: (## C.I.P,Q or Other ##)
<input checked="" type="checkbox"/> Bank Guarantee, in lieu of cash retention.
<input checked="" type="checkbox"/> Standard Industry Superannuation.
<input checked="" type="checkbox"/> Redundancy Allowance.
<input type="checkbox"/> Selected standard (G.James details in lieu of shop drawings).
<input type="checkbox"/> (## Other contract form - to be specified ##)
<input type="checkbox"/> Variations - Commencement of work on any variation to our contract price will not occur until accept...
<input type="checkbox"/> This tender is subject to the G.James Standard Terms and Conditions - (3), (attached)

### Design Criteria (17)

sort

<input checked="" type="checkbox"/> G.James standard extrusions and construction methods.
<input checked="" type="checkbox"/> Qualified Engineers certification.
<input checked="" type="checkbox"/> Compliance with minimum requirements of Australian Standard.
<input checked="" type="checkbox"/> Acoustic rated windows as per project Acoustic test report (## test report number ##).
<input checked="" type="checkbox"/> Whole of window NFRC rating to the following values for Section J of the BCA:
<input checked="" type="checkbox"/> Aluminium Finish: (## Finish ##)
<input checked="" type="checkbox"/> Design wind pressures as follows:
<input type="checkbox"/> G.James certification.
<input type="checkbox"/> Laboratory or on-site testing is not included. Our tender is based on previous tests of similar desi...
<input type="checkbox"/> (## Other certification - to be specified ##)

## Form - Clause Selection

Clauses are listed on single lines, allowing for them to be included, excluded and made irrelevant by clicking on them.

## Tender Form

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Step 1 G.James & Builder Details	Step 2 Extent of Work & Ref Docs	Step 3 Inclusions & exclusions	Step 4 Edit Inc/Excl	Step 5 Qualifications	Step 6 Edit Qualifications	Step 7 Terms & Conditions
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Save in Progress....

### Design Criteria

1.	G.James standard extrusions and construction methods.	edit reset field
2.	Qualified Engineers certification.	edit reset field
3.	Compliance with minimum requirements of Australian Standard.	edit reset field
4.	Acoustic rated windows as per project Acoustic test report [## test report number ##].	done reset field
5.	Whole of window NRC rating to the following values for Section J of the BCA: i. U value: (## X.X ##) ii. SHGC: (## X.XX ##)	done reset field
6.	Aluminium Finish: (## Finish ##)	done reset field
7.	Design wind pressures as follows: i. Ultimate Pressure: (## Uls in kPa ##) kPa ii. Serviceable pressure: (## Sls in kPa ##) kPa	done reset field

### Building Requirements

1.	Tanking of openings. Membranes compatible to window sealants are to be applied to openings and properly cured, prior to the installation of windows and doors.	edit reset field
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Building Requirements

## Form - Clause Edit

- The Multipage Custom Form presents the estimator with a progress bar that is clear and easy to use.
- All work is saved asynchronously with every progression between steps, with this method, navigation between steps is instant.

Select Company

G.James Glass & Aluminium ▾

Fax Friendly Version

 PRINT



## Tender

### Tender Details

1. Project Name	2. Type
<input type="text" value="River Mansion"/>	<input type="text" value="Tender - conforming"/>
3. Project Address	4. ID
<input type="text" value="45 Hamilton Road&lt;br/&gt;Gympie QLD 4006"/>	<input type="text" value="TES3176"/>
5. Cordell ID	6. Date
<input type="text" value="12345"/>	<input type="text" value="09/07/2010"/>

**Note A:** This Form is invalid unless accompanied by all pages.  
**Note B:** Tender is valid for a period of 30 DAYS and then shall be subject to negotiation.

### Builders Details

1. Company	2. Contact Person
<input type="text" value="Carmichael Builders"/>	<input type="text" value="George Baker"/>
3. Telephone	4. Mobile
<input type="text" value="(07) 5454 3165"/>	<input type="text" value="5048 421 564"/>
5. Fax	6. Email
<input type="text"/>	<input type="text" value="test@test.com"/>
7. Address	
<input type="text" value="15 Bruce Street&lt;br/&gt;Nudgee QLD 4003"/>	

## Tender Printout

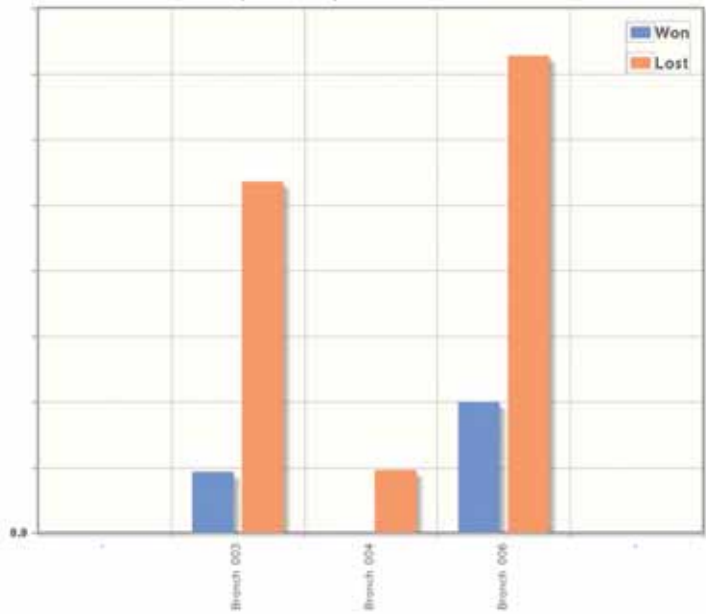
- Printer and Fax friendly documents are created on the fly
- The print formatter combines the form data with static content like Environment Policies or Terms and Conditions into a single document ready for print or email

GM Report

Home > Systems > Branch Network Tenders (Builder) > GM Report

As

Branch Status Report for the period 01/06/2010 - 30/06/2010



## Reports

Specific reports are available to estimators, managers and directors.

# The Result...

## An effective sales tool.

The Tender System went live on May 1st 2010 and quickly proved to be an effective sales tool. Estimators now have a system that is fast, easy to use and allows them to be more productive.

Managers have more peace of mind that a shared collection of up-to-date and relevant terms and conditions are being used in all the tender documents at all divisions and branches.

Now that data is stored in a central database, estimators can easily identify whether a tender has already been submitted on a project to prevent duplication.

Because the system is so easy to use, only minimal operator training was needed, and documentation is limited to a glossary of terms and a few basic instructions. The IT Department had very few support calls since the release and the system has remained stable with only a few minor adjustments made.

As a result, G.James now has better pre sales business intelligence and reporting so they have a valuable insight into the company's position and a view of potential business.



# Get In Contact...

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