



CALYX™

# Best Practice: Tender Management

CALYX.AI

# 1 Revision History

When Calyx releases a new version of InSight, they issue Release Notes which explain the new features and updates. Calyx reviews the Release Notes against each Best Practice to determine any impact to the document:

- Impact = Release notes-documented upgrade changes this Best Practice
- No Impact = Release notes-documented upgrade changes do not affect this Best Practice

When Release Notes impact Best Practice documentation, Calyx recommends that clients review the entire Release Notes for a full understanding of all changes associated with this Best Practice documentation.

Software Version	Release/Revision Date	Summary of Change(s)
V7.0	30-Apr-2021	Update Best Practice for v7.0 – Impact
N/A	02-Apr-2021	Update Best Practice for Calyx Rebranding – No Impact
v6.2 CHF6	21-Oct-2020	Update Best Practice for v6.2 CHF6 – No Impact
v6.2 CHF5	03-Aug-2020	Update Best Practice for v6.2 CHF5 – No Impact
v6.2 CHF4	28-Feb-2020	Update Best Practice for v6.2 CHF4 – No Impact
v6.2 CHF3	27-Jun-2019	Update Best Practice for v6.2 CHF3 – No Impact

## 2 Contents

- 1 Revision History..... 2
- 2 Contents ..... 3
- 3 Document Purpose ..... 4
- 4 Scope..... 4
- 5 Data Administration Activities..... 4
  - 5.1 Countries ..... 4
  - 5.2 Application Category ..... 4
  - 5.3 Application Type..... 4
  - 5.4 Procedure Type ..... 4
- 6 Tender Process ..... 4

### 3 Document Purpose

The purpose of this document is to provide a Best Practice defining the process of capturing Tender Applications and Events submitted to Regulatory Authorities or other equivalent Charitable Organisations (such as the World Health Authority (WHO)).

### 4 Scope

Capturing Tender Mark Applications and Events in Lipient InSight for Registrations.

### 5 Data Administration Activities

#### 5.1 Countries

If required create entries for organisations such as the World Health Organisation (WHO) and the United Nations Children's Fund (UNICEF)

#### 5.2 Application Category

A new Application Category should be created named Tender.

#### 5.3 Application Type

A new Application Type should be created named Tender, this should be mapped to the Default Application Type (Entity XML Type) and to the Tender Application Category; countries assigned should be Organisations (typically organisations such as WHO & Unicef) and countries appropriate for the Tender.

#### 5.4 Procedure Type

A new Procedure Type should be created named Tender, this should be mapped to the Internal Procedure Code National, all appropriate Organisations and Countries should be added.

*If minimal Data Administration changes are preferred, the Application Type of MAA and Procedure Type of National may be selected in Step 1 (below).*

### 6 Tender Process

1. An Application should be created within the appropriate Product Family with the following attributes:
  - **Application Name:** <Product Family Name> <Type of Application> <Country/Region>  
(e.g. <Product Family Name> <Tender> <WHO>)
  - **Application Type:** Tender

- **Procedure Type:** Tender
  - **Reviewing Country:** <as appropriate>
  - **Product(s);** <as appropriate>
  - Complete other fields as required by your organisation
2. Create an Event with the following attributes:
    - **Event Name:** follow organisation naming convention (e.g. New Tender Application 2019)
    - Complete other fields as required by your organisation
  3. Create a Product Detail Set as required by your organisation
  4. Create a Sequence as required by your organisation.
  5. Create an Assembly as required by your organisation.
  6. Upon receipt from the respective HA that the application has been approved/accepted:
    - Create a Reference on the Event for the approval letter or equivalent as required by your organisation.
    - Approve and Close the Event as required by your organisation.
  7. OPTIONAL. Create a Registration record as required by your organisation. (Note: this is not a conventional authorisation, but the entity can be used to capture the additional HA details that are applicable to the Tender).

Planning and Tracking activities will follow standard Calyx RIM processes.