Apet®360Pro™ Procurement Portal
User Guide 1

Configuring an Account

Overview

This User Guide describes common 360Pro™ User terminology, step-by-step instructions to set up a new Account, and configuring your new account's system settings.

1. Definitions

User	Properties
Client	Clients 'buy' Apet® 360Pro™. The Client user identifies who will be a Boss. Only the number of Bosses is 'used' to calculate licence fees; in other words Apet® 360Pro™ can have 'unlimited' Managers, Evaluators and Reporters. The Client user can also access Management Reports and extract information about all Apet® 360Pro™ Jobs conducted by 'their' Bosses.
Boss	A Boss sets up Jobs and adds users who can then be assigned against Jobs as Manager, Evaluator and/or Reporter users. The Boss user can also access Management Reports and extract information about all their Apet® 360Pro™ Jobs.
Manager	Managers handle operational aspects of evaluating and reporting Job evaluation details.
Evaluators Opener	Access Evaluation screens so they can enter scores and comments. A user authorized to Open a Job and release it for evaluation
Reporters	Access Evaluation Report screen to produce reports.
Job Release Approvers	Are able to access Jobs screen to view Job details and either approve or reject a job for publishing
Job Award Approvers	Are able to access Jobs screen to view Job and Awarding details and either approve or reject a job for awarding
SuperUser	SuperUser sets up Client logons and passwords and sets up the number of Bosses you have purchased. Only 2 Apet® Software developers are super users. However, neither SuperUser can access any Client's Jobs; i.e. all your commercial information is always secure.
Adcom	**Ad**vertising and **com**munication, the ability 360Pro has to advertise a Job and the ability of Providers to assign (communicate) their industry sector/s and geographic area/s they are able to service.

One person can 'be' all users; i.e. Clients can set themselves up as the only Boss, and then only assign themselves as Manager, Evaluator and/or Reporter users.

Users may be Managers, Evaluators and Reporters and you can have more than one Evaluator and Reporter per Job. If you have more than one Evaluator, their scores are averaged when figuring out weighted results.

Major tasks conducted by users are:

- Create a Job.
- Edit a Job.
- Publish a Job.
- Evaluate a Job.
- Reports.
- Manage Providers and Panels.
- Manage users and permissions.
- System configuration settings.
- Solving problems.

2. Logging on as a Boss

When logged on as a Boss (Username and Password is provided by SuperUser), one of the first steps is to create other Users who will be using Apet® 360Pro™ and grant relevant access to Management Reports for all Bosses.

3. Configuring a Boss Account

A Boss is a user that may:

- add 'users' authorised to manage, evaluate and report on Jobs;
- add Provider details;
- develop panels of pre-approved Providers;
- automate sending emails to Providers alerting them that a Job is open;
- set up and manage Jobs;
- change system settings; and
- generate evaluation and management reports.

To create a new Boss, contact simplylogical.net.

4. System Settings

The System area of Apet®360Pro™ is where default system settings are established. All new accounts have default settings already programmed, however before publishing a Job these settings should be checked and adjusted/customised accordingly.

Select System from the main menu/Left-hand menu.

1. Job Settings

Account Name: This is the name that Providers will see when they browse the list of Buyer accounts.

Is Public: A production account should have the 'Is Public' boxed ticked (*as opposed to a sandpit account where it must not be ticked*)

Managers Can Edit Panels & Providers: Boss Users can remove Manager's rights to edit details of Providers/Panels by un-checking this tick-box. Please see User Guide 9 for access details (default is checked).

Allow Managers to pick and choose from Panels: Boss Users can remove Manager's rights to pick and choose Providers from selected Panels by un-checking the tick-box. Please see User Guide 9 for access details (default is checked).

Show alert for Job closing date: This enables the Job Closing message template to appear in Templates (recommend to be checked).

Minimum duration to closing date: The number of days that the reminder message goes out before the Job closes.

Alert if no Providers assigned: No longer used.

Notify changes in published Job to Providers: Enables the function to notify Providers if there is a change to the Job (recommend to be checked).

Job Closing Time: The time set in the System settings will be the default closing time published on all Jobs; it can be modified within an individual Job.

Time Zone: Select your relevant time zone from the drop-down box.

Require Private Sections/Questions: Allows Job Managers to create hidden sections and questions within their Jobs.

Require Unweighted Sections/Questions: Allows unweighted sections and questions to be included (recommend to be checked).

Allow Evaluator to Override Provider Cost: Enables the Price field (adjacent to the tendered price) to be edited by the evaluator.

Allow Multi-Tender Jobs: By checking this box, an additional drop down box will appear when creating a Job to select the Parent Job. See User Guide 5 Setting up a Multi-Part Job for more information.

Closing Date Reminder Email (days): This allows you to set the number of days before a Job closing date that a reminder email will be distributed to all registered Providers who have not submitted their response. A closing date reminder Email Template needs to be completed for this function to work (See Email Templates below).

Job Publishing Requires approval: If enabled, Job Managers will require approval before publishing a Job. Following selection of this option, a new user option is created (in the Users tab in System), titled 'Job Release Approver'. By default, this setting is not selected.

Job Completion Requires approval: If enabled, Job Managers will require approval before awarding (or non-awarding) a Job. Following selection of this option, a new user option is created (in the Users tab in System), titled an 'Awarding Approver'. By default, this setting is not selected.

ADCOM ONLY FEATURES

Allow Single Submission Multi-Tender Jobs: By checking this box, you'll be able to create dependent, weighted ("child") sections within a Job. For more information see User Guide 38 on Setting up a Single Submission Multi-Tender Job.

Some Jobs require second (higher level) approval: If a work-flow approval process is required before a Job is published, a Boss can switch on 2-step approval process (default is unchecked). (Please see User Guide 35 for more information).

Job Documents - Managers must set 'Fee required': If enabled, this function allows Users to restrict Provider access to Job documents until a fee has been paid. Options are: *No - hide the 'Fee required' option*, *or Job Manager must decide for all Jobs.* (Default is set to *No - hide the 'Fee required' option*). If fee required is selected, a text box for a global Fee Description is available (Please see User Guide 33 for more information).

Job Documents - Count # Downloads?: If enabled, supporting documents attached to the Job Info tab will be counted every time they are downloaded by Providers. 'Job Document Downloads – Excel' report captures the number of times a file is downloaded and duplicate downloads will not count (i.e. if a provider downloads the same document more than once, the count remains as 1 download).

If "Job Documents - Count # Downloads?" is switched ON, then ALL Job documents (Supporting Documents on the Job Info tab and those attached at the question and section level) WILL NOT be available for Providers to download or export after a Job has closed.

Pre-Submission Rules: It could be the case with a published Job Providers are not allowed to submit their response unless, for example, they have attended a mandatory site visit or industry briefing,. Users of 360Pro's Adcom functionality are able to set "pre-submission rules" for a Job. (Please see User Guide 34 for more information).

Allow adding Job Business Unit (Sponsor): If enabled, Job Managers will have to select the Business Unit who has published the Job. Business Unit is a drop-down box on the Job Info page and the list of Business Units to choose from are added via Business Unit tab in System settings (the same way Statements are added to the Statement library). Business Unit is not displayed on Provider's Info page and Business Unit data is captured in Evaluation plus Risk report and Job Listing report.

Job Settings

Fields marked with an asterisk (*) sign are mandatory

Account Name	mc2admin1
Is Public?	☑
Managers Can Edit Panels & Providers?	☐
Allow Managers to pick and choose from Panels	☐
Show alert for job closing date	☑
Minimum duration to closing date	0 *
Alert if no providers assigned	☑
Notify changes in published job to providers	☑
Job closing time	08:00 PM ˅
Time zone	(UTC+10:00) Canberra, Melbourne, Sydney ˅
Require Private Sections/Questions	☑
Require Unweighted Sections/Questions	☑
Allow Evaluator to Override Provider Cost	☑
Allow Multi-Tender Jobs	☑
Allow Single Submission Multi-Tender Jobs	☑
Closing date reminder email (days)	1
Job Publishing requires approval	☐

Figure 1 Job settings

2. Response Settings

Store provider contact information: No longer used

Allow Late Tender: Late Tender button visible on the Job Management screen. See User Guide 16 Late Tender Window for more information on this function.

Late submission period (in minutes): You can set the number of minutes 'grace' you will allow tenders to be submitted after the Job has officially closed. The number of minutes entered into this field will be added to every job that is published from the account, by default. See User Guide 16 Late Tender Window for more information on this function.

Can contact manger: By checking this box, there will a button ('Contact Job Manager') displayed in the top right hand corner of the Job (on the 360Pro™ Provider's portal) that will enable the Provider to email the Job Manager with any queries.

Allow Alternate Submissions (Adcom only): Allows Providers to create and submit an alternate submission with their original submission. Please see User Guide 36 for more information.
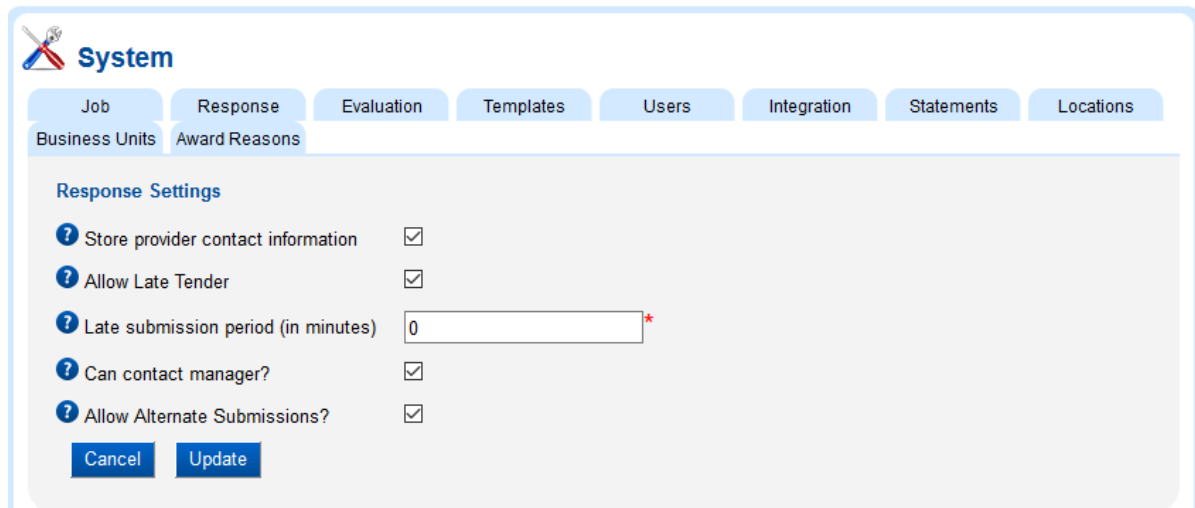
Figure 2 Response settings

3. Evaluation Settings

Comments Mandatory: If the 'Comments mandatory' box is selected, Evaluators have to make comments for all sections and questions.

Provider Based / Section Based Evaluation: To evaluate your Job, make sure your evaluation settings are updated to have the option to evaluate per provider and/or per section (check the Systems, Evaluation boxes for Provider Based Evaluation and Section Based Evaluation).

Non-Conflict Confirmation Required: If enabled, each Evaluator assigned to evaluate a Job will have to confirm they have no conflict of interest with any of the Providers who have responded to the Job before being able to evaluate the responses. By default, this setting is not selected. See User Guide on Evaluating Tenders for more information.

Number of openers: An 'Opener' is a role that can be assigned to a user to 'open' a tender for evaluation purposes once it has closed. If the 'Number of openers' has been set to ≥1, a 'Select Openers' box will appear in the 'Users' tab to be able to set the user assigned to that role.
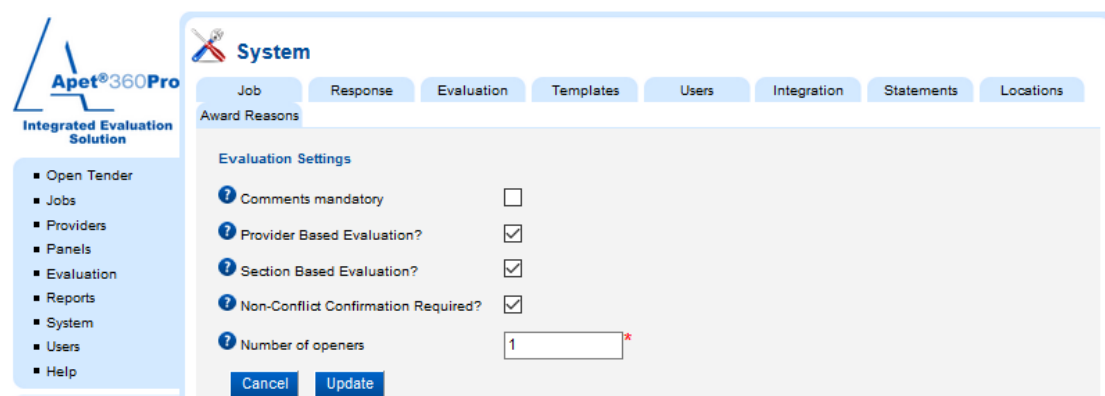

Figure 3 Evaluation settings

4. Email Templates

This section allows you to customise the text of emails received by Providers. The format of templates need to stay the same (e.g. #PROVIDERNAME#), but the text can be customised i.e. remove "Apet360 Management Team' and put your organisation's name.

If there is no text in the template, the email will not be distributed.

Further information on email templates is referred to in all User Guides where an email can be distributed to a Provider.
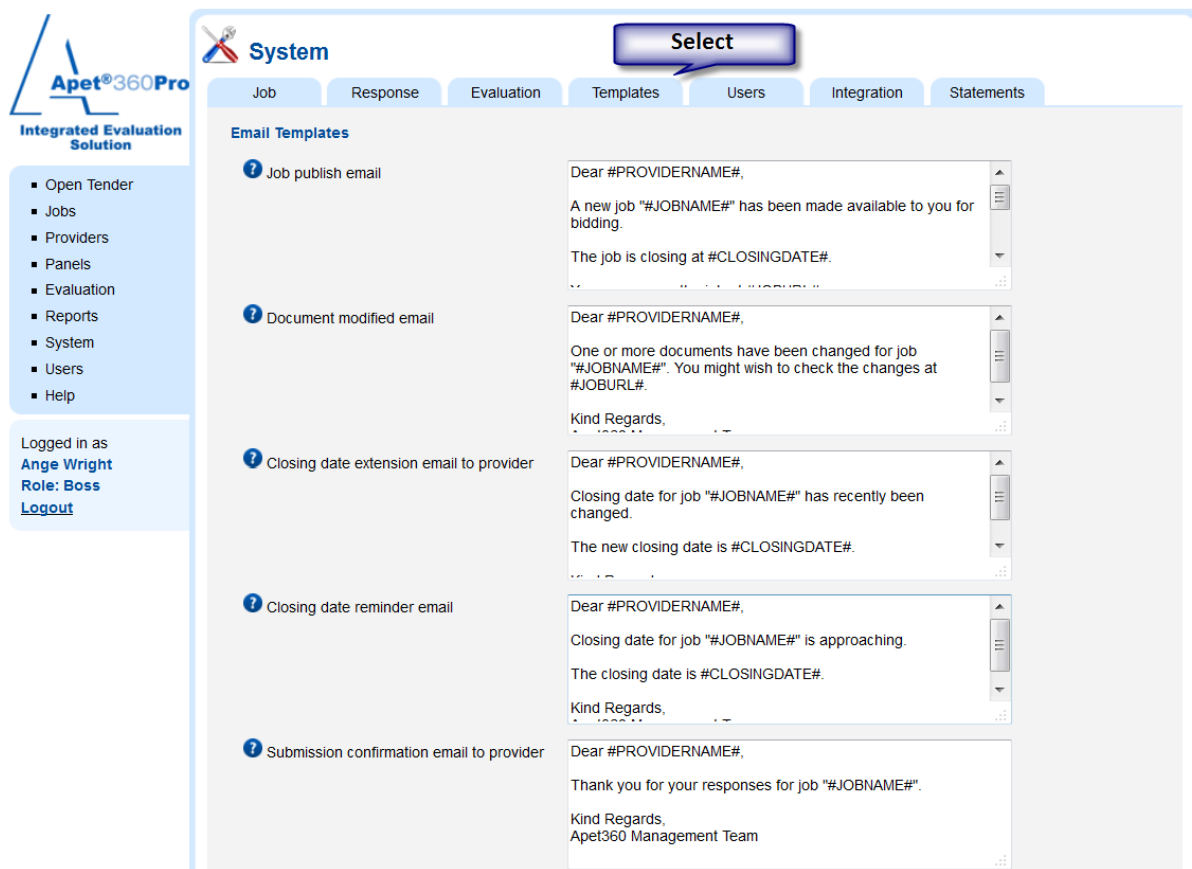

Figure 4 Email templates

5.   Default Users and Roles

This section allows the Boss user to establish who will be set as a default Manager, Evaluator and Reporter. The users selected in the System settings will be listed within individual Jobs to be selected per Job (i.e. each Job may have a different Manager)

If the 'Number of openers' has been set to a number ≥1, a 'Select openers' box will appear and a User can be assigned that role.

If the 'Job publishing requires approval' has been selected in Job Settings, a 'Select Job Release Approvers' box will appear and a User can be assigned that role. The Approver will receive an email from 360Pro when the Job Manager is ready to publish their Job. See User guide on Publishing a Job for more information.

If the 'Job Completion requires approval' has been selected in Job Settings, a 'Select Awarding Approvers' box will appear and a User can be assigned that role. The Approver will receive an email from 360Pro when the Job Manager is ready to award their Job. See User guide on Awarding a Job for more information.
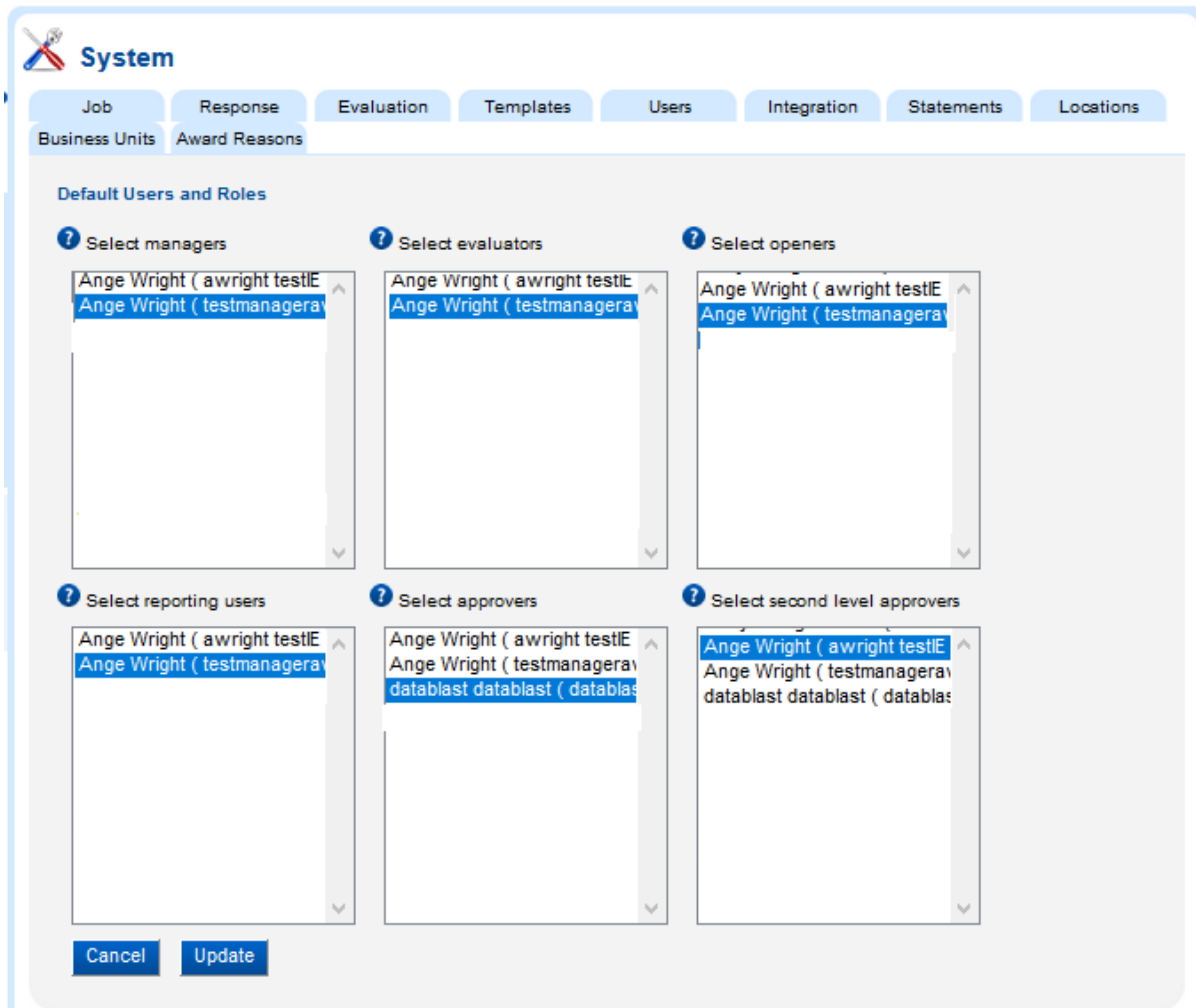
Figure 5 Default users and roles

6. Integration Settings

If you have a licence for Apet®PlantHire™ you are able to link your 360Pro™ account to those accounts. A PlantHire tab will appear when your Jobs are created in 360Pro™. Contact LC&S for settings for your account.

7. Statement library

This section allows you to add any statements that you would like available as responses to your Job's questions. Be mindful of your spelling in the Statements tab, statements cannot be deleted/corrected after they have been added. Also, there is a 50 character limit (including spaces) on the length of your statement.
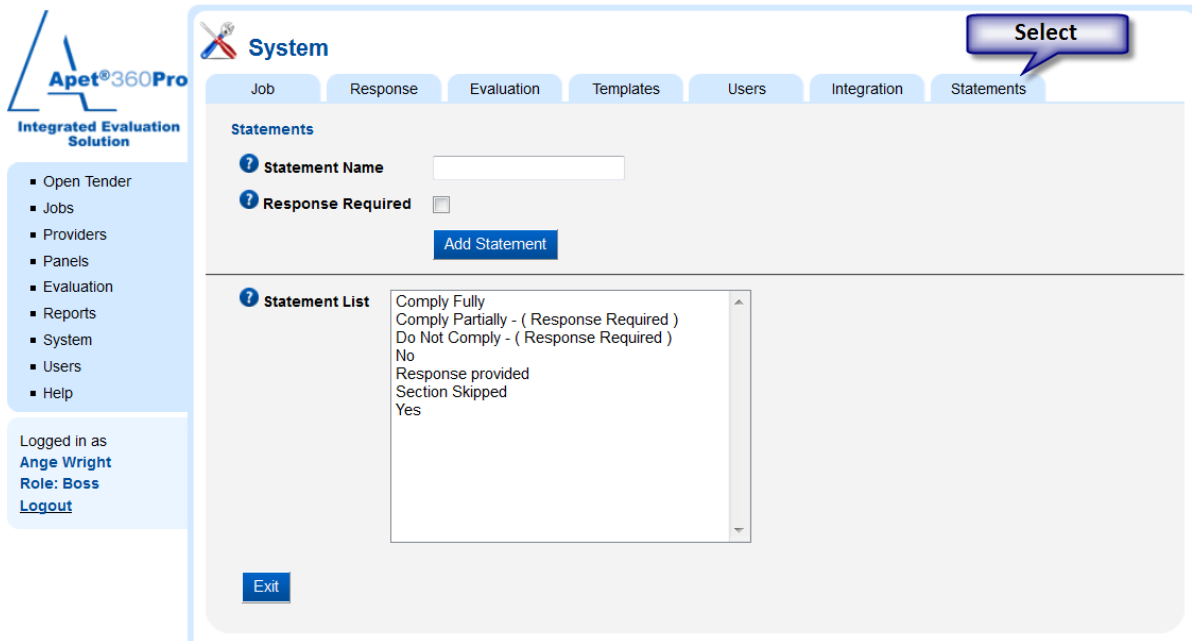
Figure 6 Statement settings

8.   Location library

This section allows you to add Locations that can be assigned to a Provider's account and will also be available for Job Managers to select if they are creating a Job that has '*Location Associated*'. Please refer to the Local Preference Functionality User Guide for more information.
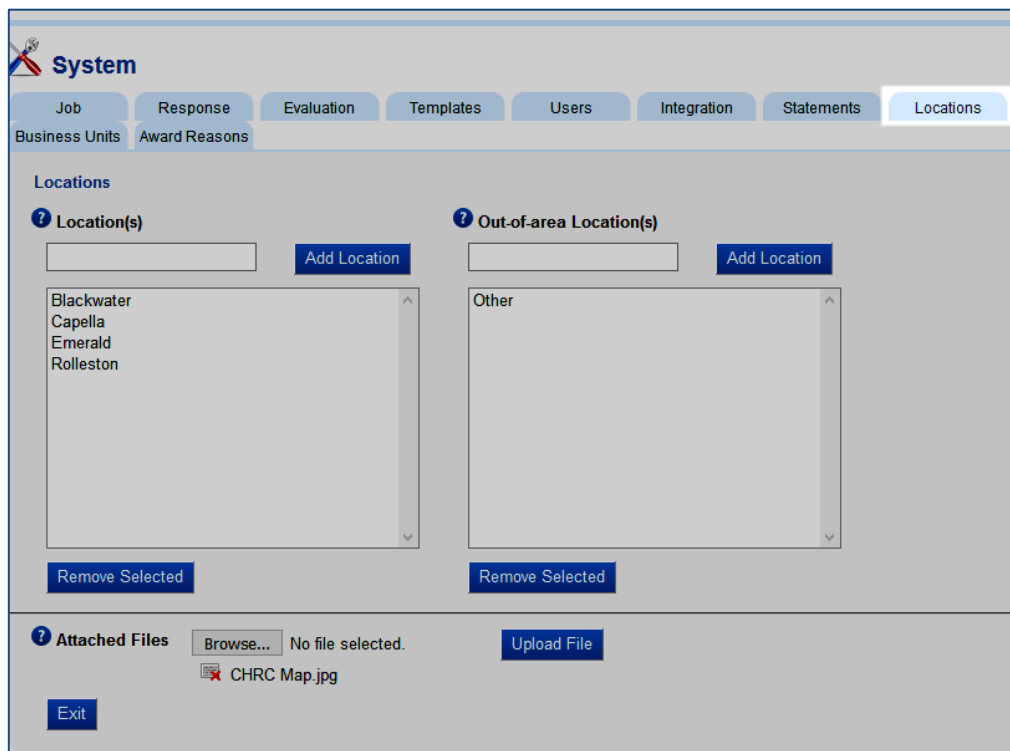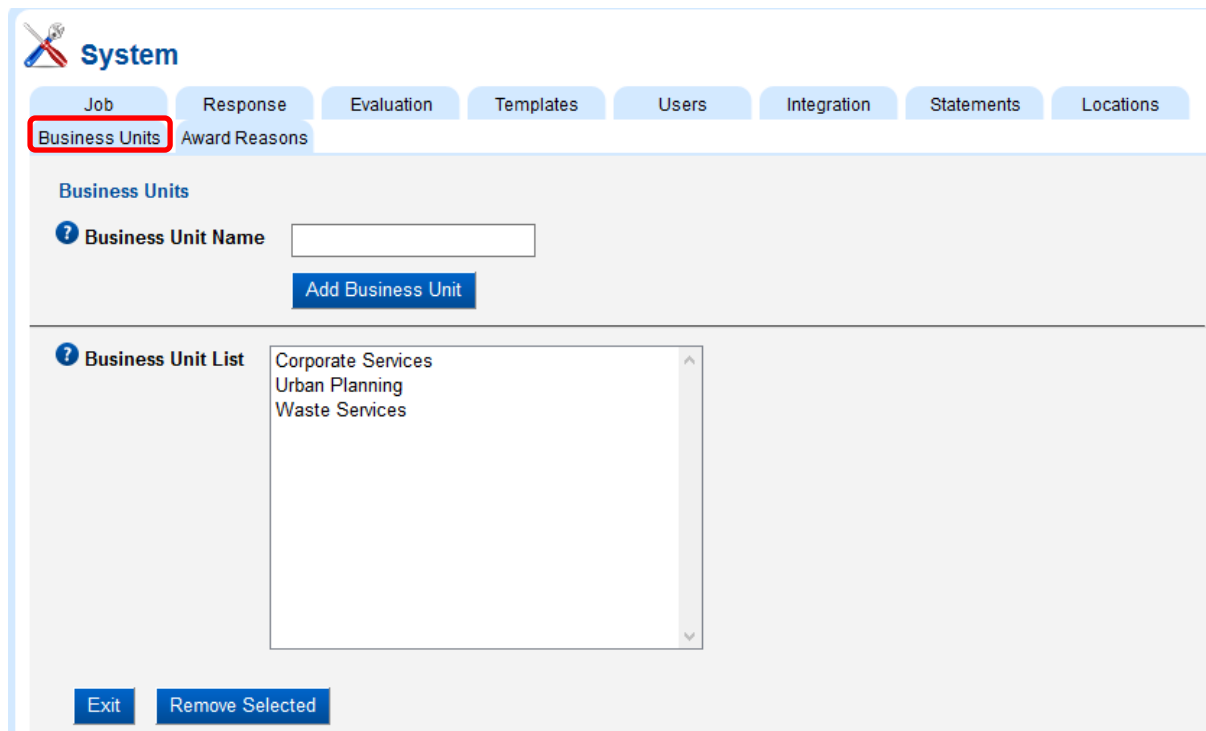

Figure 7 Location settings

9. Business Unit Library (ADCOM Only)

This section allows you to add Business Units that you would like available as options for Job Managers to select from when they creating their Job.
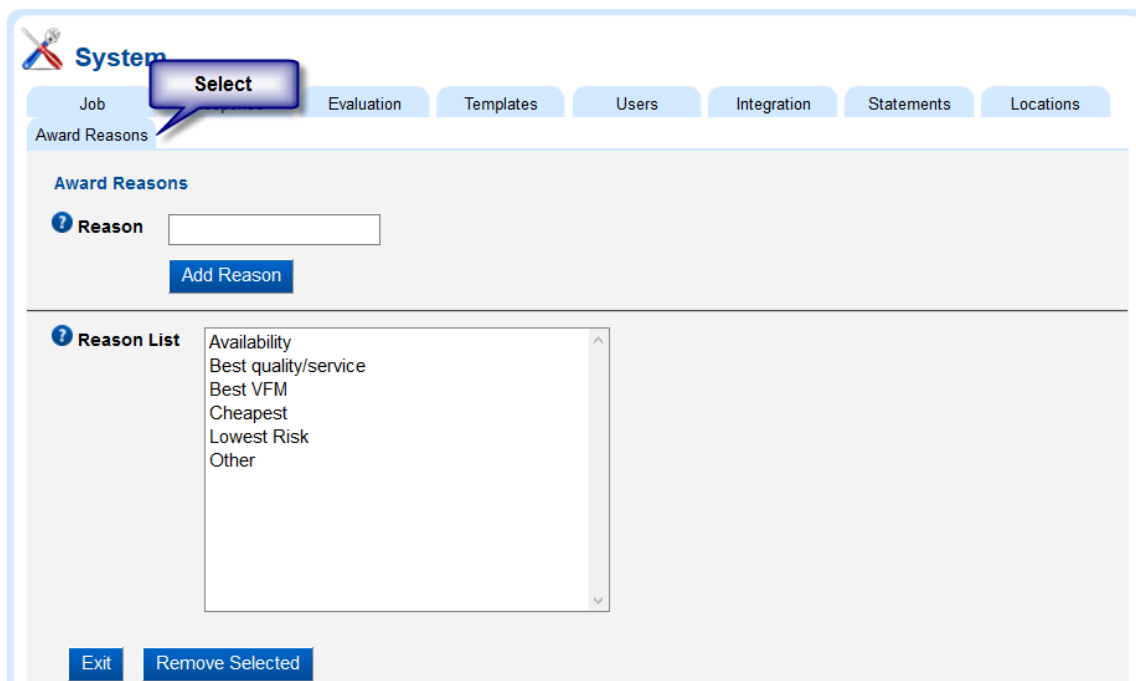
10. Award Reason library

This section allows you to add any award reasons that you would like available as options for Job Managers to select from when they are awarding a Job.

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