360Pro™

'source selection in a box, see it to believe it'

Apet®360Pro™ Procurement Portal

User Guide 2

Create, Configure or Clone a Job

Overview

This User Guide provides you with common 360Pro™ terminology and step-by-step instructions on creating or cloning a Job (approach to the market).

Definitions

Terms	Definitions
Jobs	any approach to the market - RFIs, RFQs, RFPs, or RFTs you are managing in Apet® 360Pro™.
Template	any approach to the market (RFIs, RFQs, RFPs, or RFTs) that are available to Job Manages in order to create a new Job.
Sections	headings within which you identify, describe and weigh the questions you want Providers to answer. You may have multiple Sections, but the combined weight of all Questions must sum to exactly 100%.
Questions	'sit' under Sections. After you have added a Section, click its tab to open the way to add Questions.
Publish	what you do to generate a unique URL for each of your Jobs. You won't see Publish appear until the Job has been fully set up as far as questions and costs are concerned.
Providers	the companies, people, organisations who will be responding to your Jobs.
Panels	are set up for a group of Providers and you can assign a Job to a Panel which will make Apet® 360Pro™ send each panel member and email alerting them to the Job.
Submit	is what a Provider does to lodge their response.
Award	is what you do to identify who will be the preferred Provider. Award makes Apet® 360Pro™ send an email to the preferred Provider and an email to Providers who missed out. You won't see Award appear until Jobs have been fully evaluated.

Create a Job

There are three methods of Job creation; Direct, Clone and Import. Direct and Clone methods are discussed in this chapter and the method for importing Jobs is explained in User Guide 4. How to Merge or Import a Job.

The first method is to manually enter Job details. Navigate to the Job Management page (Click on Jobs on the RHS), "Add" a new Job, and enter Job details accordingly.

- **Parent Job:** The name of the parent Job needs to be selected, if the Job that is being created is the 'child' Job linked to a parent (see User Guide 5. How to create a multi-part Job)
- **Job Name:** Enter the name of the Job as it will appear when published
- **Job Details:** This section allows you to enter a brief description about what the Job entails.
- **Contact Instructions:** This section allows you to enter specific contact instructions the Provider may use to obtain tender-specific information. Using the flag #CONTACTINSTRUCTIONS# in the Job Published email will include the contact instructions for any restricted Jobs.
- **Pre-Submission Rules (ADCOM ONLY):** Please see User Guide 34
- **Allow Alternative Submission (ADCOM ONLY):** Please see User Guide 36
- **Business Unit (ADCOM ONLY):** A drop-down box to select the Business Unit who published the Job. 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
- **Costs Associated:** By selecting 'yes' this will include a Costs Model tab in the Job and require completion by the Tenderers. See more about Costs in the Cost Models Instructions User Guide.
- **Risks Associated:** See more about Risk in the Including Risk in the Assessment User Guide.
- **Section Required:** Be selecting 'Yes' this will enable you to divide your Job into sections and allow each section to have a corresponding tab, with questions underneath. See more about Sections in Configuring the Job, Sections and Questions User Guide.
- **Pre-qualification:** See more about Pre-qualification in Create and Manage a Pre-Qualification Job User Guide.
- **Score Upper Limit:** The number selected here is used for evaluating the Job – enter the upper limit score that will be used when it comes time to evaluate. This is often 9 or 10 depending on preference.
- **Closing Date:** This is the date the Job will close. This date will be published as the closing date and tenders will not be able to submit their tender after this date.
- **Closing Time:** This is time of the day the Job will close. You can select time zone in your System settings.
- **Set as default:** By selecting this box it enables your settings to be pre-selected when it comes to creating a new Job
- **Document Fee Required (ADCOM ONLY):** Please see User Guide 33
- **Black Flag:** This section allows you to specify the conditions that would result in a Provider being excluded, or 'black-flagged', form the tender evaluation. As with other Job details, these conditions would be displayed on the Job Management page and visible to any registered Providers. See more about black flagging in the Black Flag a Response User Guide.

HTML tags – When using HTML formatting for Job Details, please ensure the <u>entire text</u> consists of HTML tags.

For example, instead of:

```
Please enter your <b>ABN</b>
```

The HTML should be:

```
<span>Please enter your <b>ABN</b></span>
```

The provider's portal (being HTML based) will apply the format with or without the wrapping tag however the Excel and PDF cannot so 360Pro uses the inclusion of a wrapping tag to know whether or not to remove HTML tags. The best tags for wrapping the text are:

1. `<div>` for a block of text consisting of multiple paragraphs or dot-points
2. `<p>` for a single paragraph
3. `<span>` for a single line

Remember to include the closing tag at the end.

This will ensure when the Provider Response Report and/or Job Details Reports are downloaded, the **HTML tags** are identified and **removed**.

After Job details have been entered, the user interface changes slightly:

- A traffic light icon appears on the left-hand side as a way of notifying you about the "status" of your Job creation (**red:** hover your mouse over the traffic light and it will alert you as to what needs to be completed, **amber:** Job is ready for publication, and **green**: Job is published) and

- Eight icons (globe, tuxedo, open folder etc) appear under the Job Management heading to direct you to different Job areas utilised by the Boss user.
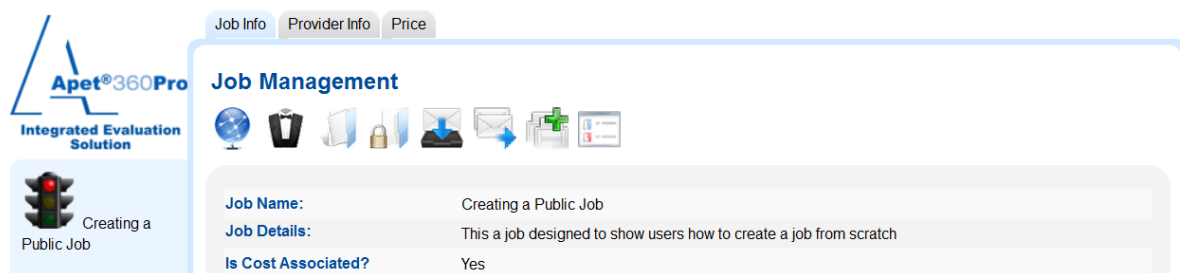

Figure 1 Job Management User Interface

Nine Icons

Figure 2 Job Management icons

Globe

The globe icon is used to add Providers or a Panel of Providers to a Job, making it a select/restricted Job. See User Guide – Create Panels and Providers for more information.

Tuxedo

The tuxedo icon is used to add assign Users to the Job; selecting who will be the Job manager(s), evaluator(s) and reporter(s). See User Guide – Create or Assign Users for more information.

Open Folder

The open folder icon is used to add/manage Sections (entering Clauses). New Sections can be added by clicking on the open folder icon and clicking 'Add'.

'Section Type' option will be displayed if 'Allow Single Submission Multi-Tender Jobs' has been selected in Job System Settings (Adcom function). Please see User Guide 38 on Setting up a Single Submission Multi-Tender Job for more information.

Sections can be made Private (hidden) or Optional, allowing the Provider to 'Skip' the section.

It is a good idea to keep the name of the Section brief, so that it can fit on the tab heading in its entirety. Note: Ensure **NO** sections have exactly the same name (otherwise the Export to Excel report will return the first instance each time)

After Section has been added, a new tab will appear at the top of the view (next to Price or Provider Info)

Folder with Padlock

The padlock folder icon is used to restrict Users from evaluating certain sections of the Job (if applicable). See User Guide – Restricting Evaluators for more information.

Inbox

The inbox icon (envelope with downwards pointing arrow) is used to list all messages that have been received from Providers (sent from Providers using the *Contact Job Manager* button in the 360Pro Provider Portal).

Sent Items

The sent items icon (envelopes with sideways pointing arrow) is used to send messages to all Providers who have registered for your Job. See User Guide – Issuing an Addenda and Changing Documents for more information.

Clone a Job

The clipboard with a green cross icon is used to clone a Job. Cloning a Job is the quickest way to create a Job based on a Job already entered into 360Pro:

1. Click on the clipboard icon with the green cross.
2. Enter a new Job name, closing date and closing time.
3. Select the parts of the original Job you would like copied (Basic information or Entire Job)
4. Select whether there is going to be a Costing section in the new Job
5. Click Copy

7. Your new Job will be listed on the main Job Management page. You can edit details and add documents by opening the Job and selecting Edit.

Weightings

The icon at the end with the blue and red box is used to review the weightings applied to your Job sections and questions. See User Guide – Assigning Weights for Questions and Sections for more information.

The yellow envelope icon is the email outbox for the Job. The outbox lists the emails sent from 360Pro™ in relation to the Job (including all addenda, and if applicable, Provider registration emails, change in Job documents, acknowledgment email, etc). By clicking on the email subject, the Job Managers are able to see the content of each email sent from 360Pro™.

Select Provider Information

After Job details have been entered, you are then able to enter the company information you require from Providers by clicking on the 'Provider Info' tab.

The items you are able to select from the seven drop-down menus include ABN/ACN/ARBN, Address, Company Name, Contact Name, Contact Email, Contact Phone, and Public Liability Details. You can select whether the information required is mandatory, by clicking the 'Mandatory?' box.

You don't need to select any options in this tab if you ask your tenderer's details question within a section you've created. Just leave this tab 'as is' and it will not be displayed to Providers.

Managing Questions

Click on the Section tab that the question will belong to and click 'Add'. Note: Ensure that **NO** questions have exactly the same name (otherwise the Export to Excel report will return the first instance each time)

For more specific information regarding question details, refer to the User Guide 03. Creating and Configuring Job Questions.

Adding Documents

If documents (e.g. Job specifications) need to made available to the tenderers, they can be attached via the 'Upload Documents' button on the Job Management page. If your documents are excessively large (>50mb) we discourage attaching them in the portal and recommend setting up a File Transfer Protocol (FTP) or Dropbox account (See File Transfer Protocol or Dropbox User Guide).

360Pro-Adcom only: If '*Job Documents - Count # Downloads?*' has been enabled in System settings, supporting documents attached to the Job Info page will be counted every time they are downloaded by Providers. A 'Job Document Downloads – Excel' report captures the number of times a file is downloaded and will not count duplicate downloads (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.

After Provider Information and sections/questions details have been added, weightings applied, and supporting documentation has been attached, you should be ready to Review and Publish.

Review and Publish

Following completion of these Job details, the traffic light symbol should be **amber**; indicating that the Job is ready to be reviewed and published. If the traffic light symbol is red, this indicates there are areas of the Job that require completion. Hover over the traffic light icon to see what is left to compete.
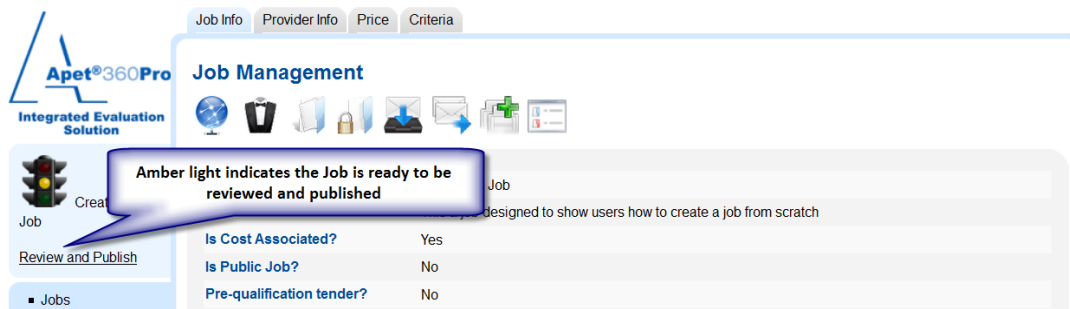
Figure 3. **Ready to Review and Publish**

Create a Template

Template Jobs are created by Boss Users and are available to all Job Managers in the User account. You cannot assign users to a Template Job and Job Managers can't edit any aspect of a template; they can only create new Jobs from the Template. This ensures that the Template is never published (in its template configuration and it cannot inadvertently be deleted by Job Manager, no addenda can be sent out etc.
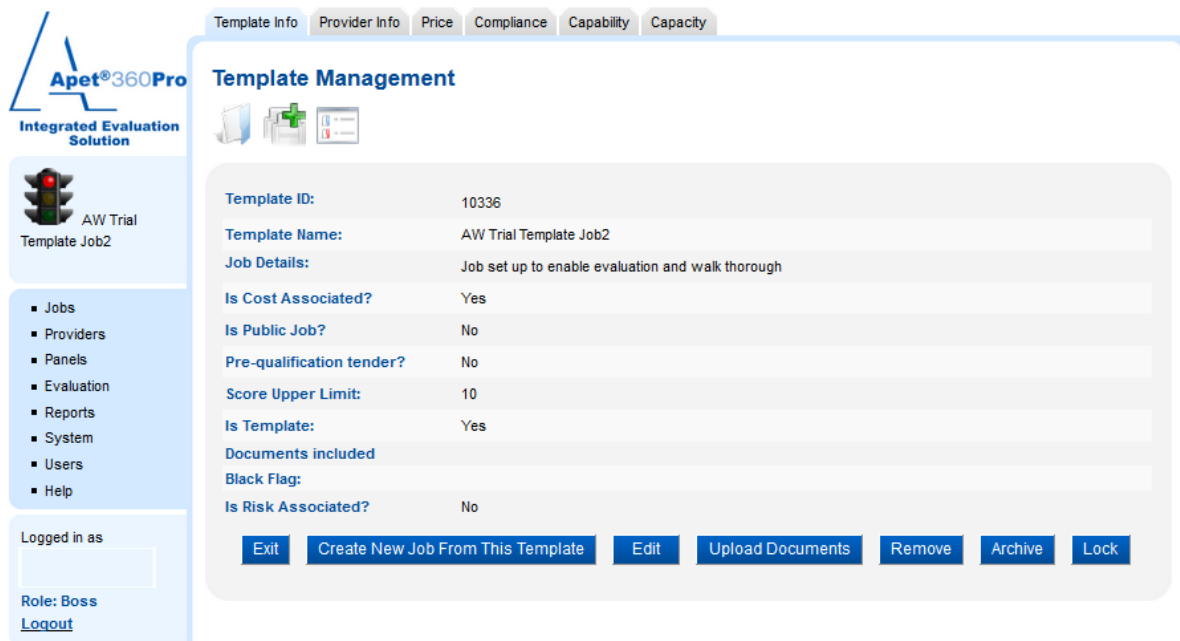
Figure 4 Template Job

Boss users can create a Template as you normally would create a Job; the only difference is you put a 'T' in cell A:1 instead of a J (for Jobs) if you're importing your template Job. You can also create a Template manually via the 'Add Template' button on the Job Management view.

Figure 5 Boss' perspective of a Template Job

After Template Job is created, it can be edited as a normal Job would be.

From the Job Manager's perspective, they can only create a new Job from the template and view the Sections, questions, and Weightings.

Creating a Job from a Template Job

Jobs can be easily created from a Template Job; this is particularly helpful for RFQs. A template Job is created by the Boss User (see instructions above) and will sit at the top of all Job Manager's Job Management view.

1. Click on the desired Template Job
2. Click on the 'Create a new Job from this Template button' button (See Figure 5 and 6 above)
3. Follow the steps that you normally would to clone a Job
   a. Crate the new Job name
   b. Select the closing date and time
4. Select what components of the template you would like in your Job (Sections and Questions, Supporting g Documents, Costings) – all options are selected by default. Please note: If there were no supporting documents in the Template Job, the Supporting Documents option will not be available, and the same goes for Costings.
5. Click Copy
6. Edit/configure your newly created Job accordingly and publish