

Apet®360Pro™ Procurement Portal User Guide 3




Creating and Configuring the Questions

Overview This User Guide provides new Users with specific details about configuring Jobs, Sections and Questions compared to importing these configuration details via csv file.


The screenshot shows the configuration interface for creating a question in the 360Pro Procurement Portal. The interface is organized into several sections:

- Question:** A large empty text area for entering the question text.
- Question notes:** A rich text editor with a toolbar and a text area for adding notes.
- Private Question?:** A checkbox, currently unchecked.
- Mandatory?:** A checked checkbox.
- Allow attachments?:** A checked checkbox, with a sub-section for "Maximum Uploads:" and an empty input field.
- Outgoing document:** A "Browse..." button next to the text "No file selected."
- Evaluation guide:** A "Browse..." button next to the text "No file selected."
- Evaluation guide (Rich Text Editor):** A second rich text editor for defining the evaluation guide.
- Note:** A text block stating: "Note: Write Evaluation guide in bullet points with number and text to speed up evaluation process. For example:" followed by a bulleted list:
 - 3 Adequately meets requirement
 - 2 Poor response
 - 1 No response given
- Allow response?:** A checked checkbox.
- Weighted Question?:** A checked checkbox.
- Relative Weight:** A text input field containing the value "0" with an asterisk indicating it is required.



Note: Ensure that

NO sections or questions have exactly the same name (otherwise the Export to Excel report will return the first instance each time)

- **Question:** This is the field used to contain the question
- **Question Notes:** This field allows the User to provide additional notes about the question; visible to tenderers (only displayed for non-Scorecard questions)
- **Private (Hidden) Question:** This allows the User to create questions that only the Evaluators see, not the tenderers. Ensure that all questions in a Hidden section are also hidden.
- **Mandatory:** Adds the word “(mandatory)” on to the end of the question’s text
- **Allow Attachments:** Allow (or not allow) the tenderer to attach files to their response
- **Maximum Uploads:** Enter the maximum number of attachments a Provider can upload to their response for this question. If left blank (default setting), the number of attachments is unlimited.
- **Outgoing Document:** Attach a form that the tenderer needs to complete and attach to their response
- **Evaluation Guide – Attachment:** This enables the User to attach a guide that will assist with the following evaluation process
- **Evaluation Guide – Notes:** This enables the User to write notes that will assist with the following evaluation process. If you comma separate the terms and use a colon, it will present in a list that populates the score. eg 10: Outstanding, 9: Excellent,8: Very good, etc
- **Allow Response:** Allow (or not allow) the tenderer to write a response
- **Weighted Question:** see User Guide Assigning Weights for Questions and Sections
- **Relative Weight:** Assign a weight that is relative to the other questions in the section. No need to calculate percentages to ensure weights equal 100%; 360Pro will do it for you when you click on the  icon.
- **Response Type:** See User Guide 28 on Structured Data Fields.
- **Response Length:** The User is able to define the maximum length (number of characters including spaces) of a written response
- **Is a Scorecard:** Selecting this option presents sequential questions in a single view. This is handy where you just want simple, structured responses (e.g. phone number, email address, ABN), or statement (pull down) responses. Scorecard questions **cannot** accept attachments or display question notes and if you nominate multiple pull down options, the Provider has to open the text box to respond if necessary.

- **Is Skippable:** This will allow the Provider to 'Skip' that series of questions (generally questions in a scorecard configuration).
- **Skipped by default:** Set the question to skipped by default.
- **Statement List:** Using the CTRL key the User is able to select and deselect responses that are applicable to the question and able to be selected by tenderers. New statements can be added in the Configuration of an Account chapter.

Once all question details are complete, click Add. Questions can be edited and/or deleted before publishing and Sections can only be deleted once all questions within that Section are deleted.

HTML tags – When using HTML formatting for questions, please ensure the entire text consists of HTML tags.

For example, instead of:

Please enter your **ABN**

The HTML should be:

`Please enter your ABN`

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. `` 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**.

If you have not already done so, the next step is to Assign Users (selecting managers, evaluators and reporters for the Job - see User Guide Create or Assign Users) and if Costs are associated with the Job enter the Cost Model Instructions (see User Guide Cost Model Instructions), and then Publish (see User Guide Publishing a Job).