

## 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.

Question

Question notes

Private Question?

Mandatory?

Allow attachments?  Maximum Uploads:

Outgoing document  No file selected.

Evaluation guide  No file selected.

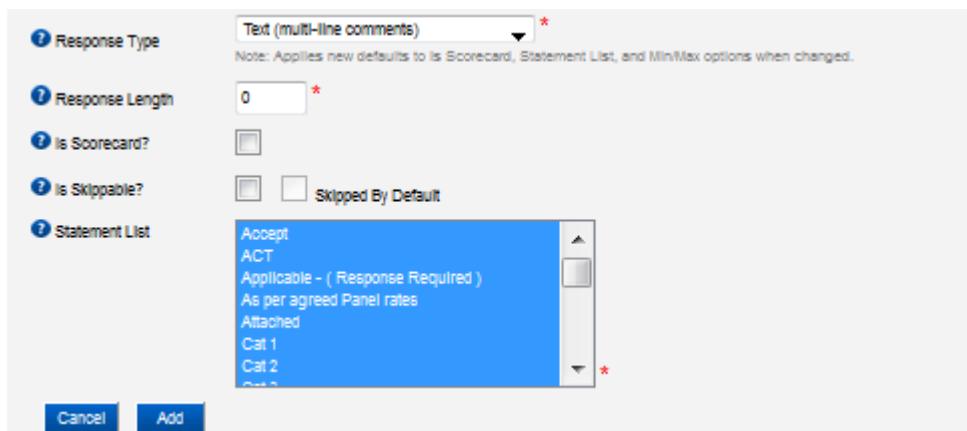
Evaluation guide

Note: Write Evaluation guide in bullet points with number and text to speed up evaluation process.  
For example:  
\* 3 Adequately meets requirement  
\* 2 Poor response  
\* 1 No response given

Allow response?

Weighted Question?

Relative Weight  \*



The screenshot shows the configuration interface for a question. The 'Response Type' is set to 'Text (multi-line comments)'. The 'Response Length' is set to 0. The 'Is Scorecard?' checkbox is unchecked. The 'Is Skippable?' checkbox is also unchecked. The 'Statement List' dropdown is open, showing several options: 'Accept', 'ACT', 'Applicable - (Response Required)', 'As per agreed Panel rates', 'Attached', 'Cat 1', 'Cat 2', and 'Cat 3'. At the bottom of the dialog are 'Cancel' and 'Add' buttons.

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 <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**.

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).