

Apet®360Pro™ Procurement Portal User Guide 4



How to Import or Merge a Job

Overview

This User Guide provides instructions on importing and merging a Job from an Excel file or a MS Word document.

1. Import a Job

Importing a Job is the most common way to enter a Job into 360Pro because it allows a substantial amount of Job information to be entered quickly.

2. Excel Import File

You can import Job information into 360Pro™ using an Excel file. Import via Excel allows the inclusion of special characters and foreign languages in your Job's content.

An Excel import file is created from scratch or via an example template. You can download the example Import Job file template from the 'Import Job' view from 360Pro's Job Management screen and begin the process of creating your import file.

HTML tags – When using HTML formatting for question and job descriptions, 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**.

3. Configure your Job

Each Excel column represents a different characteristic of the Job that may need to be completed noting that values in some columns are mandatory (e.g. column A). For Columns A and B, flags are used to indicate features either present or absent in an import record. The first Excel row (row 1) defines the Job and must be completed as follows:

Row 1 Put a letter J in cell A:1 to designate it as a Job. **The letter T in A:1 designates the Job as a Template.**

Put the following letters in Cell B1 accordingly (not a mandatory setting):

- C Only if a 360Pro Cost template is associated with the Job.
- P If it is a Prequalify Job

Put the Score Upper limit (e.g. 10) in C:1.

Put name/title of the Job in cell D1. It is a good idea to have a naming convention and include the designation of the eRFx in the title e.g.: RFT 2015/22-Provision of Hired Plant & Equipment

Put the tender closing date and time in cell E1. This field **MUST** be in the following format or the Excel file will not load into 360Pro: YYYY-MM-DD HH:MM AM/PM eg: 2014-08-19 02:00PM

Put the Job description into cell F:1. This is what potential tenderers will see published on the web and assists them in making a decision whether or not to register and download the eRFx.

We can now format the sections and questions. We recommend you have no more than about 70 Sections and no more than 250 questions for each section as > 250 questions in a section creates some screen navigation challenges for the Provider if they're using MS Explorer.

Column A Put a letter S to denote Sections (mandatory Column)

Put a letter Q to denote Questions

Be mindful not to duplicate any section or question name. The reason for this is when it comes time to run evaluation reports, the Export to Excel report will only pick up the first instance of the duplicate. Do not skip any rows (i.e. leave a row blank) or 360Pro will think you are finished at the last row.

Column B For **Sections**, put the following letter in Column B (if required, otherwise leave blank):

- H makes it a Hidden Section – the Providers don't see the section but the evaluators do. If you make a section Hidden, ensure that you make all the questions in that section Hidden as well.
- O makes the section and all its questions Optional – the section can be skipped by a Provider.

For **Questions**, put the following letters in Column B accordingly. If you leave this column blank, the question will appear as a statement only:

- R If a Response is required (recommended). If you do not include this setting, then the compliance statements or response box do not appear to the Provider.
- A If an Attachment is allowed –You cannot attach documents to Scorecard questions. If you put an A in on its own, it will not show a text box or drop down option or be mandatory.
- W If the questions is Weighted (to be scored) – If you set a W, you must specify a weight in column C for this row.
- M Indicates it is mandatory requirement and places the text ‘(Mandatory)’ after the question.
- H This will be a Hidden question visible only to evaluators. Often used as a summary scoring option or to score aspects not submitted by the tenderer such as financial viability, demonstrations or inspections. Questions that are revealed on the dependency of another question are to be set to Hidden by default.
- S Indicates it is a Scorecard question (Scorecard questions do not allow Provider attachments or display question notes)
- Sets the question to Skipped by default

Column C Relative Weighting (number) - defaults to 0. Ensure that all weighted sections have at least one weighted question within them or you will not be able to publish the Job. You must have at least one weighted question in the Job. (mandatory Column where sections/questions are weighted)

Column D Contains the text for the Job name, Section names that appear on the tabs, and Questions. Ensure that you **do not duplicate** any Sections or questions or the Export to Excel report will only give you the first instance. (mandatory Column)

Column E Evaluation guide for Questions (only seen by evaluators) – You can just place text in here but if you include comma separated values and comments, the system will use those to auto-populate the scores and comments. i.e. 10:Fully Met the requirements,8:Partially Met,6:Somewhat Met,4:Did not meet,2:Unsatisfactory response,0:Did not respond. Population of this column is not mandatory.

Column E for Sections also supports a JSON rule to expose the Section if a specific response is provided to a question. See User Guide 29 for details.

Column F Contains the Statements the Provider will need to select from when responding to the question. There is a 50 character limit (including spaces) on the length of your statement and the statement must already be listed in your System settings (see User Guide 1 – Configuration of an Account). Population of this column is **mandatory** but the pull down options do not appear if you do not insert R in column B or if there is only one statement. You can force a single statement to appear if you place a B in column K.

Column G Max character limit (max 8000) including spaces. The Provider will get an alert if they exceed the value.

Column H Multi-select list. Options are to be separated by a comma

Column I Export ID – this provides a simple heading for the section and question when you export to excel. Ensure that you do not duplicate any Export IDs or the export report will only give you the first instance.

Column J Enter question notes that will be visible to Providers when responding to that question (if applicable) – will not appear for Scorecard questions.

Column K Enter the relevant response type flag (import codes listed in the table above, \$ - Currency, D – Date, I – Integer etc) See User Guide 28 on Structured Data for the other flags.

Column L/M Column L is minimum value allowed and Column M is the maximum value allowed in the correct response format. If minimum or maximum values are left blank, then no restrictions will apply.

Column N By placing the word TRUE in Column N against all questions in a series of scorecard questions, it allows the Provider to ‘Skip’ that series of questions. Please note: If you have multiple scorecard questions (i.e. a series of scorecard questions) on the one page, either ALL or NONE have to be skippable; you can’t pick and choose. The whole series of scorecard questions have to be set to TRUE.

Column O Column O supports a JSON rule to expose the question if a specific response is provided to a question. See User Guide 29 for details.

Not available The import file does not support the import of attachments. This is done via the UI and is recommended to be attached at the Job Info page.

The import file does not support the designation of the maximum number of attachments. This is done via the UI.

4. Ten quick steps to get your import file started:

1. Put a letter J in A:1 (to indicate a Job).
2. Put a C (to set Cost Associated) in B:1.
3. Put a T (to set to Plain Text) in B:1.
4. Put the Score Upper limit (i.e. 10) in C:1.
5. Put the Job name into D:1.
6. Put the Job closing date into E:1. The format has to be the same, i.e. “2011-12-20 5:30PM”

7. Put the Job details into F:1.
8. Enter remaining details (as discussed above in 3.Configure your Job)
9. Spell check
10. Save as an Excel file.

5. Copy your RFT from MS Word into Excel Import File

An alternative method is to copy the Job details from MS Word into the Excel template.

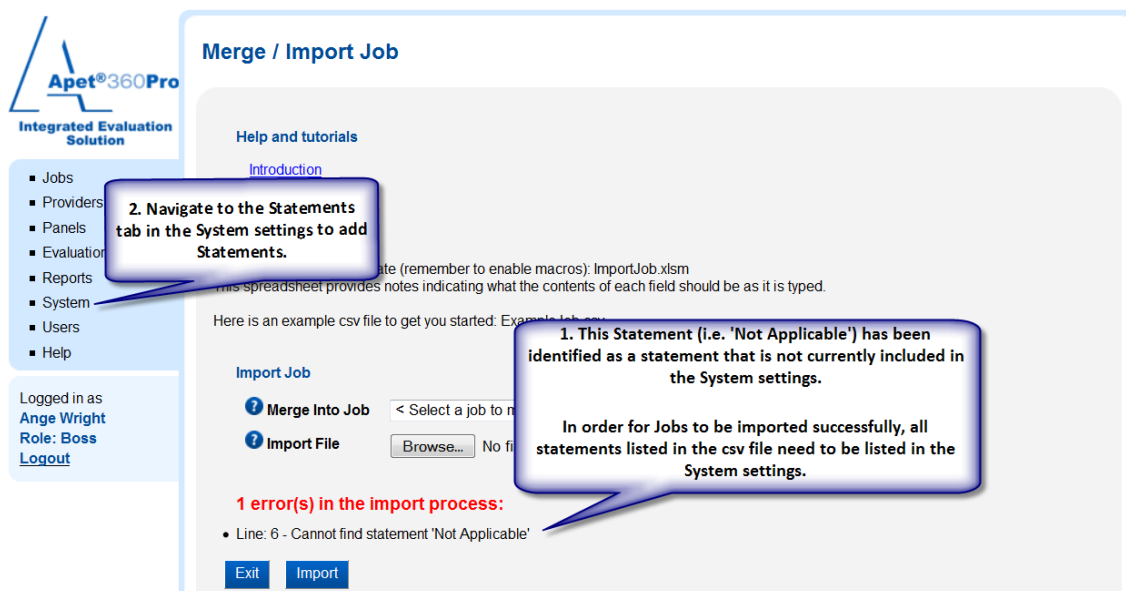
- a. Copy the RFT name from Word and then paste it into cell D:1
- b. Column A - Put a letter S in front of every section, Q in front of every question.
- c. Delete any empty top-level (grouping) sections, as these make no sense in the 360 world.

6. Importing into 360Pro™

Now that your Excel file is complete, the next step is to import the Job into 360Pro Portal. Navigate to the Job Management page and select Import Job.

Browse to the Excel file and click Import.

If there are discrepancies in the Excel file, the file will not be imported. For example, if there are discrepancies in the Statements (Column F) between the Excel file and the Statements already entered into the System, the file will not be imported and an error message will appear with all details (See Figure 2).



The screenshot shows the 'Merge / Import Job' page in the Apet 360Pro system. The page title is 'Merge / Import Job'. On the left, there is a navigation menu with items: Jobs, Providers, Panels, Evaluation, Reports, System, Users, and Help. The user is logged in as 'Ange Wright' with the role of 'Boss'. The main content area has a 'Help and tutorials' section with an 'Introduction' link. Below this, there are instructions for importing a job, including a note to enable macros and a 'Browse...' button. Two callout boxes provide additional instructions: one points to the 'System' menu item with the text '2. Navigate to the Statements tab in the System settings to add Statements.', and another points to the error message with the text '1. This Statement (i.e. 'Not Applicable') has been identified as a statement that is not currently included in the System settings. In order for Jobs to be imported successfully, all statements listed in the csv file need to be listed in the System settings.' At the bottom, there is a red error message: '1 error(s) in the import process:' followed by a list item: 'Line: 6 - Cannot find statement 'Not Applicable''. There are 'Exit' and 'Import' buttons at the bottom.

Figure 1 Error in the Import Process - Statement Discrepancy

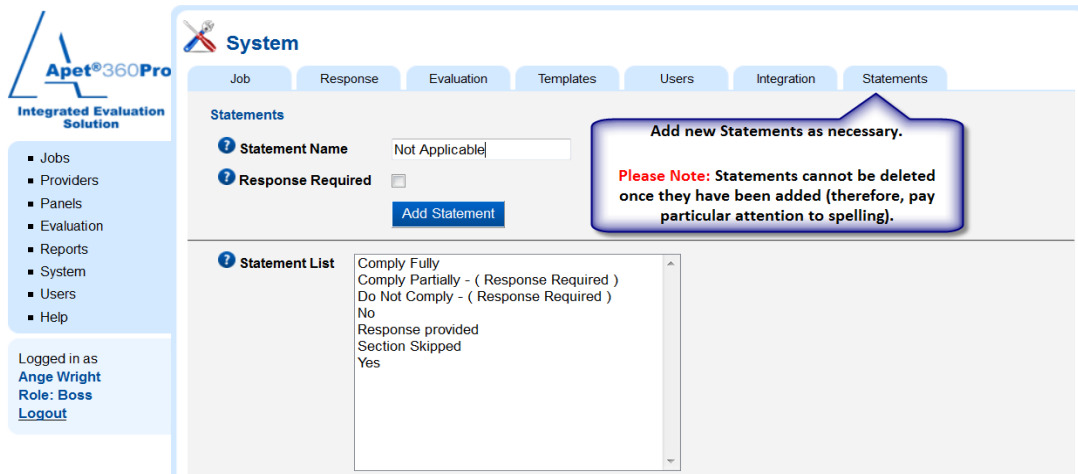


Figure 2 Adding a new Statement

Note: See User Guide 1 Configuration of an Account for further information on Statement settings. You need to have 'Boss' access to access the systems view.

A message will be displayed ('Job imported successfully') after the Job is successfully imported.

After the Job has been imported, assign users, review Job details and publish.

7. Merge a Job

This function allows you to merge an import file into another Job.

1. Create the import excel file that you wish to append into an existing Job with the sections and questions. **Delete row 1 Job data that is in the template.**

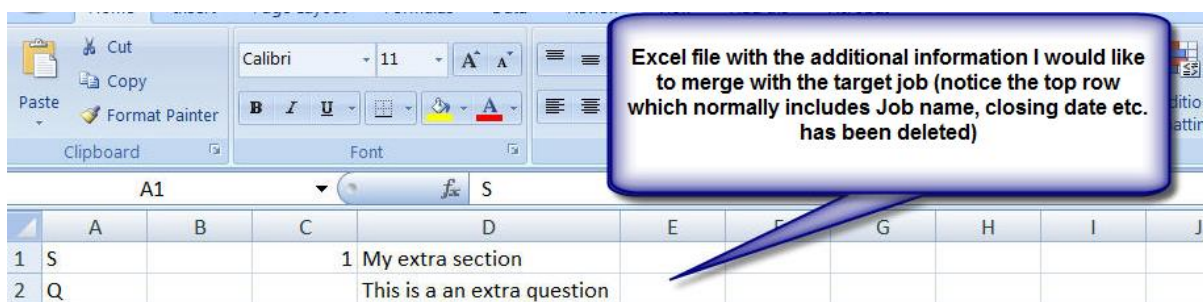


Figure 3 Import Excel file

2. Navigate to Job Management and select Import Job
3. Select the target Job that you want to append to via 'Merge Into Job' pull down list
4. Browse to the Import file, select the Excel file, and click on the Import button
5. The system will then append the sections and questions from the EXCEL file to the target Job.

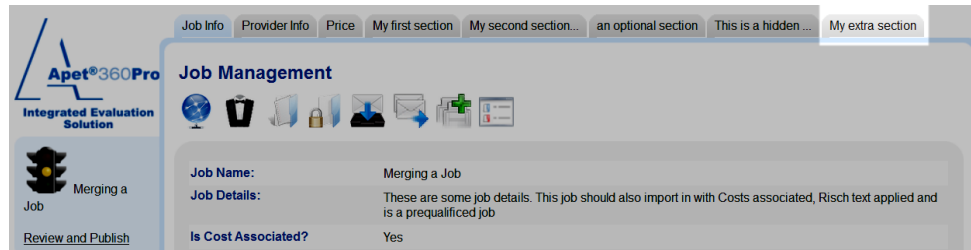


Figure 4 Target Job with additional tab ('My extra section') on the end

After the Job has been merged, assign users, review Job details and publish.

8. Help

Specific help on importing Jobs can be accessed through the hyperlinks ([Introduction](#), [Data Format](#), and [Tutorial](#)) from the Merge/Import Job page.