

Apet®360Pro™ Procurement Portal User Guide 7



Create and Manage Pre-Qualification Job

Overview

This User Guide describes the functionality for Pre-qualification of Providers.

You (as the Job Manager) would use this Pre-qualification of Providers function when you wish to set up a panel or Multi-User List (MUL) of pre-qualified, approved or preferred Providers.

Functionality

360Pro™ provides a function to configure a Job to allow Providers to respond to a request from you to provide information that will allow you to evaluate and accept (or reject) them as pre-qualified, approved or preferred Providers.

The Job is configured as a Pre-qualification Job and published either publicly or restricted as usual.

The closing date for the job is usually set for a very long time frame – often to the end of the financial or calendar year but responses can be assessed at any time after they are submitted.

Providers respond as normal to the Job and submit.

Providers can re-open their response and resubmit.

Once the Provider has submitted a response, the Evaluator can evaluate the response, even though the job has not closed. This allows responses to be evaluated and assessed on an ongoing basis and successful Providers added progressively to a Panel or list of Prequalified Providers.

When a Provider has submitted their response, the User who set up the Job will receive an email notification that a response is available to evaluate.

Evaluators then evaluate as normal.

When a Provider has been evaluated, you can then:

- set the Pre-qualification status for Providers
- change the Pre-qualification status for Providers
- reset the Pre-qualification Job for all Providers

Providers are notified of their status and can view the status of Pre-qualification Jobs.

It is envisaged that you would then set up a panel for the scope of work covered by the Prequalified Providers. Jobs can be issued to the panel and there is no need for the pre-qualified providers to provide 'basic' information they've previously submitted and which caused them to reach pre-qualified status.

One month before expiry you are notified by email of imminent closing date arrival.

You can then extend the closing date for another period which will trigger an email to be sent.

1. Adding a Pre-qual Job

Navigate to the Job Management page; select 'Add' or 'Import Job' depending on the way you wish to create your Job. If you are **importing** your job, make sure you configure your import file correctly (Step 3 below) **before** you upload it.

2. Configure a Prequal Job

There are two ways to set a Job up as a Pre-qualification Job, depending on the way you wish to create your Job (i.e. Importing or creating a Job manually):

Import

Put a P (to set Pre-qualification Job) in cell B:1 of the Import file. This cell may also contain a C (to set Cost Associated).

	A	B	C	D	E	F
1	J	P	10	powerwater Test Job 120922	2012-12-2	These are
2	S		2	My first section		
3	Q			ensure it has provided full		Yes,No
4	Q	R		Is the Respondent nor any of it		Yes,No
5	Q	RA		This is a question requiring a re		Comply Fi
6	Q	RAW	3	This is a question requiring a re	10:Fully M	Comply Fi
7	Q	RAWM	3	This is a question requiring a re	10:Fully M	Response
8	Q	HW	5	This is a hidden question that i	10:Fully M	Response
9	Q	RW	5	This is a question requiring a re	10:Fully M	Response

Figure 1 Example csv import file

Manual

Select the Pre-qualification radio button on the Job Management page.



Risk Associated? No Yes
 Section Required? No Yes
 Pre-qualification? No Yes
 Score Upper Limit *

Figure 2 Pre-qualified setting on Job Management Page

- 2.1. Set the closing date (in the Import file or on the Job Management page) for an appropriate period of time (usually 6 – 12 months after you publish the Job or based on the financial or calendar year).

- 2.2. If you are **importing** your Job – finish off the Section/Question/Response etc details and import your job now (the remaining Pre-qual steps are completed manually in the portal).
- 2.3. From the Job Info Tab, select the Prequalify Button and set the validity and reminder period and expiry date.

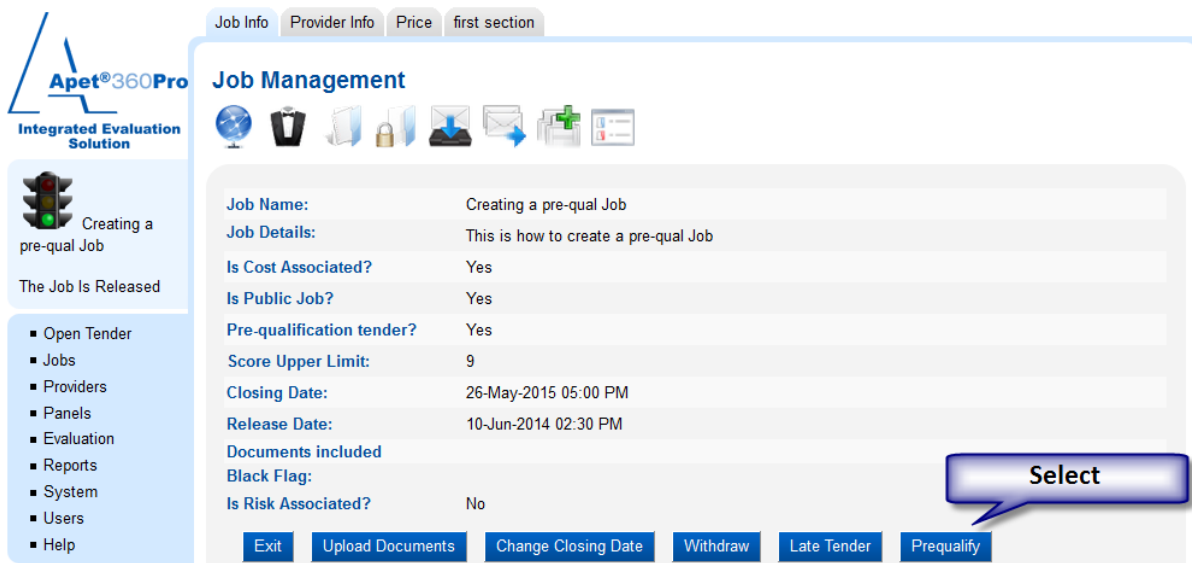


Figure 3 Prequalify button

- 2.4. Publish the Job as usual.
- 2.5. Evaluate the Responses as they are submitted.

3. Set Prequalify Status

- 3.1. Once assessed, you may set the status for the response by selecting the 'Prequalify' button from the 'Job Info' tab (Figure 3 above).

This view (Figure 4) also indicates the status of all Providers who have registered for this Job. From this tab, you may designate the Provider as having 'Passed' or 'Failed' the Prequalifying evaluation by selecting individual or multiple providers (by holding down the Ctrl key) and selecting the appropriate action (**read note below before setting the rating for a Provider**).

When you set the Pre-qualification rating for a Provider, the Provider is sent an email* notifying them of the result.

***Note: BEFORE you set the rating for a Provider, you should check the notification email templates in the System settings that will be sent to them and modify them accordingly (if there is no text in the template, the email will not be sent).**

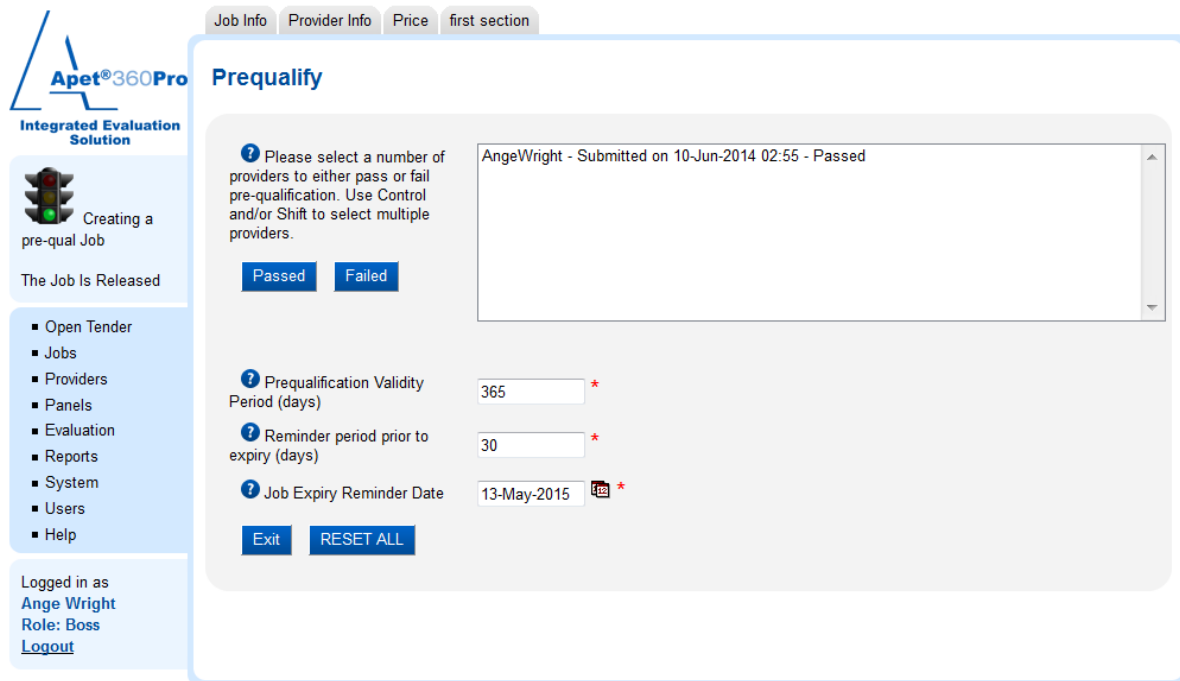


Figure 4 Prequalification status

4. Provider's Perspective

The status of the Pre-qualification jobs is available for the Provider to view via the 'Medal' icon which opens a popup box listing the results and status.

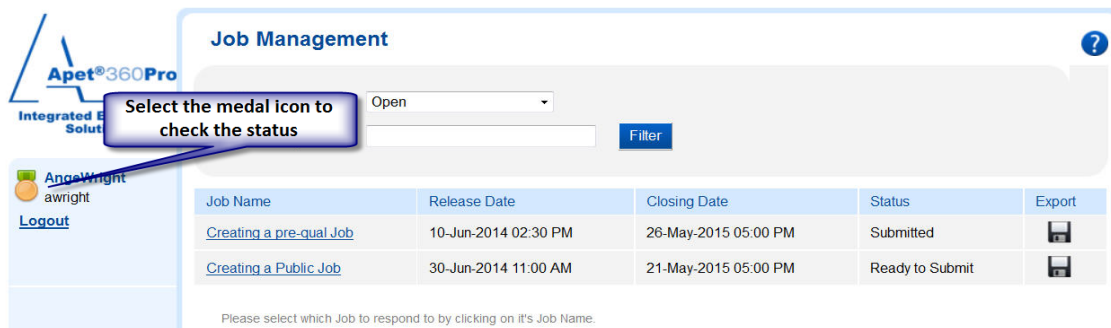


Figure 5 Job Status - Provider's perspective

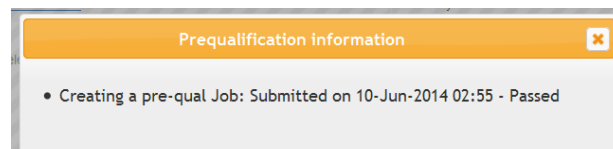


Figure 6 Prequalification Information - Provider's perspective

The Provider may re-open their response at any time, amend and resubmit. This will set the status of the Job to 'Not Yet Submitted' or 'Pending'.

5. Reset All

One month before expiry (or however many days you had selected) you are notified by email of imminent closing date arrival.

You may re-open the Pre-qualification job (by clicking on the Pre-qualify button) and extend the

closing date for another period via the RESET ALL button.

This resets the evaluation and sends an email to Providers for them to re-open the Job and check/update their information (particularly relevant for insurance details).

This requires all previously “approved” respondents to reapply.

An email will be sent to all Providers notifying them the Job has re-opened.

The Response is then re-submitted, evaluated and ‘Passed’ / ‘Failed’ again.

You may ‘Pass’ a Provider without their Response being evaluated.

6. Reports

A Pre-qualification report is available to Show or Export the results on a Job by Job basis.

As with all other jobs, if the Response is evaluated, the scores are available in the Reports. We suggest that the ‘Results’ report is applicable for this activity.

Closing Date:	12-Dec-2017 08:00 PM
Is Template:	No
Release Date:	11-Dec-2017 11:00 AM
Job Awarding Approvers:	
Job Awarding Approval Date:	
Documents included	<ul style="list-style-type: none"> • RFT 10-2016 Contract.docx (11.4 KB) • RFT 10-2016 SPECIFIED PERSONNEL Form Ange's company.docx (17.3 KB)
Fee Required:	No
Black Flag:	
Is Risk Associated?	No

Temporarily Close Job: Audit Reason
✕

?
Audit Reason

Apet®360Pro
Integrated Evaluation Solution

Job Info | Provider Info | Tenderer's Details | ABN | Capacity | Insurance

Job Management

Job ID: 21153
 Job Name: TCJ Test #2
 Job Details: Job set up to test new ABN look-up
 Pre-submission Rules Apply: Yes

TCJ Test #2
The Job Is Temporarily Closed

Job Temporarily Closed Email to Provider(s)

#JOBNAME# has been temporarily closed.

Kind Regards,
Apet360 Management Team

Job Reopen Email to Provider(s)

#JOBNAME# has been reopened for submission.

Please sign-in to Apet360 to view Job details and to submit your response.

Kind Regards,
Apet360 Management Team

[Exit](#)
[Upload Documents](#)
[Change Closing Date](#)
[Withdraw](#)
[Late Tender](#)
[Prequalify](#)
[Reopen Job](#)

Temporarily Close Job: Audit Reason

Audit Reason

Save Cancel

Audit Type:

Job temporarily closed by the Boss

Job reopened by the Boss