

Apet®360Pro™ Procurement Portal User Guide 8



Create or Assign Users

Overview

This User Guide describes the steps involved to create and assign Users as evaluation managers, evaluators, and reporters. Users can be assigned their roles in the System settings (default) and also assigned a role in a specific Job.

Roles:

Managers handle operational aspects of evaluating and reporting Job evaluation details.

Evaluators are able to access Evaluation screens so they can enter scores and comments.

Reporters are able to access Report screen to produce reports.

Job Release Approvers* are able to access Jobs screen to view Job details and either approve or reject a job for publishing

Job Awarding Approvers* are able to access Jobs screen to view Job and Awarding details and either approve or reject a job for awarding

Non-Scoring Evaluators# are able to login, click on the job they have been assigned to evaluate, confirm their non-conflict of interest (if applicable), and view provider's responses. Non-Scoring Evaluators are unable to score, write comments, and/or set info tags.

Record Managers# are able to invoke or approve working paper removal process. Please refer to User Guide 39 for more information.

* Options displayed only if 'Job Release Requires Approval' and/or 'Job Completion requires Approval' have been switched on in Job System Settings

User options only available for 360Pro-Adcom accounts

1. Creating a User

Boss Users are able to create an unlimited number of Users within their account.

To create a User:

1. Click Users
2. Click Manage Users
3. Click Add
4. Create a Username and Password for the new User
5. Enter contact details for the new user (including a valid phone number and email address)
6. Select which role the User **can** be selected for (Job Manager, Job Evaluator, Job Reporter, Job Opener, and or Approver(s))
7. Click Create

If you need to **Edit** User details

1. Click Users
2. Click on their Username
3. Click Edit
4. Edit any relevant details (please note: Usernames cannot be changed)
5. Click Update

If you need to **deactivate** a User (i.e. they no longer work for the organisation)

1. Click Users
2. Click on their Username
3. Click Edit
4. Select "Is deactivated" checkbox
5. Click Update

By deactivating them, the User is unable to login and unable to retrieve their login details but their past evaluations remain intact.

There is **no need to delete** a User; deleting a User will delete their evaluations, panels they've created etc.

2. Default user allocation as managers, evaluators, reporters, approvers, and/or record managers

The default user allocation as managers, evaluators, reporters, approvers, and/or record managers may be amended in the System settings of the portal.

One person can 'be' all users; i.e. Clients can set themselves up as the only Boss, and then only assign themselves as Manager, Evaluator and/or Reporter users.

Users may be both Managers, Evaluators and Reporters and you can have more than one Evaluator and Reporter per job. If you have more than one Evaluator, their scores are averaged when figuring out the weighted results.

Multiple users can be assigned a role by holding *Ctrl* key while they are selected.

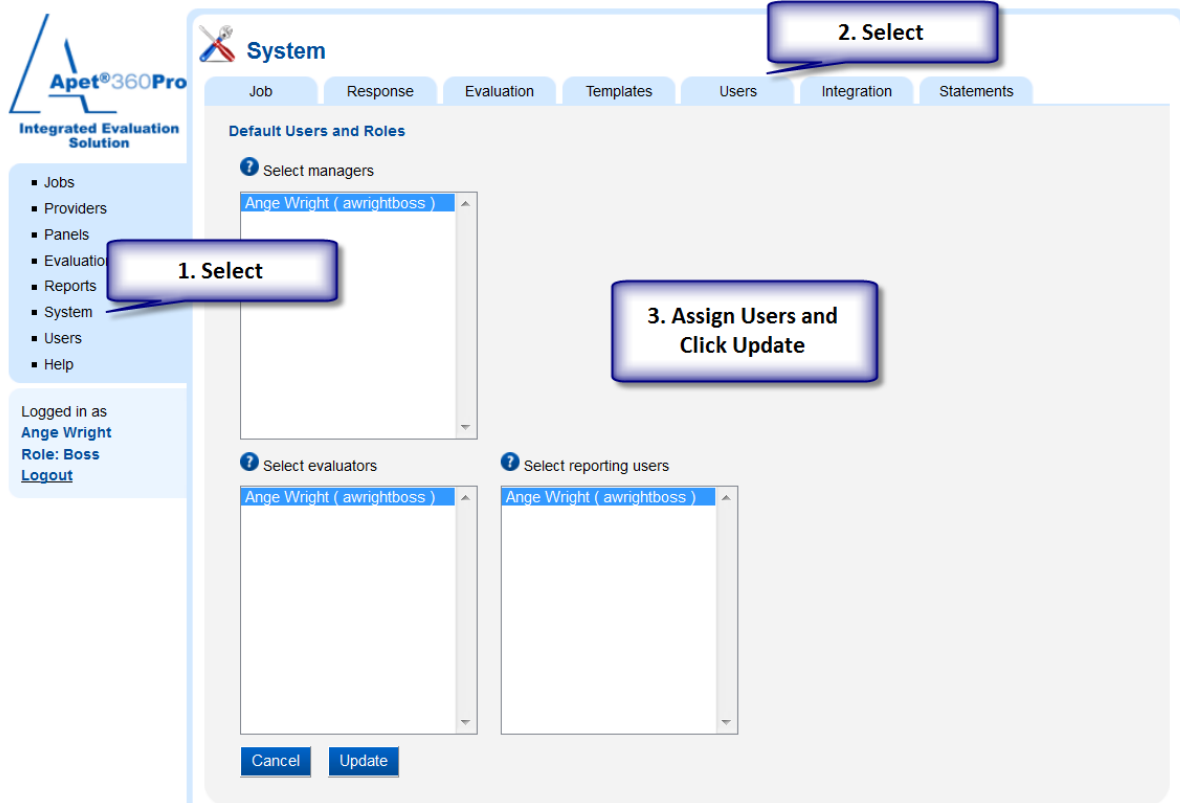


Figure 1 Assign and review default user allocation

3. Select Job evaluation managers, evaluators, reporters etc

To assign users for a specific Job, Open up the Job and click on the Tuxedo icon. Select the team members to fulfill the evaluation managers, evaluators and reporters and click Update.

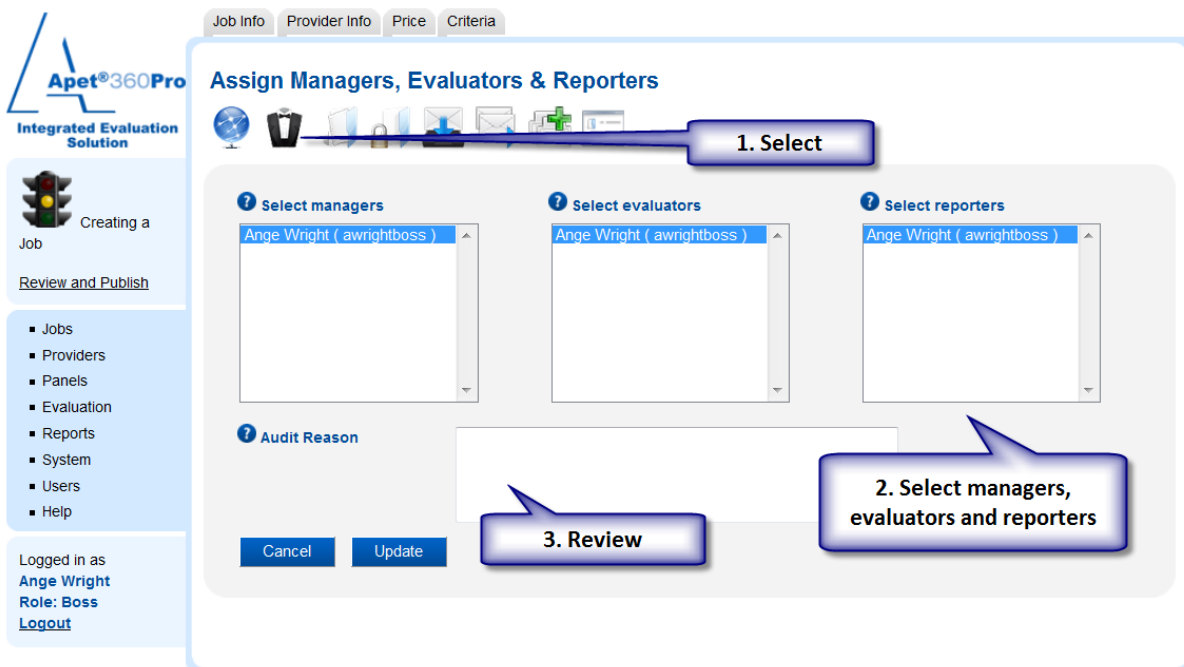


Figure 2 Select evaluation managers, evaluators and reporters

If managers, evaluators, reporters, approvers etc. need to be changed **after** the job is published or closed an audit reason will need to be completed.

After users have been assigned, sections and questions are complete, a cost model is included (if applicable), and weights are assigned to sections and questions (if applicable) your Job is ready to be reviewed and published (Traffic light icon will be **amber**).