

Apet®360Pro™ Procurement Portal User Guide 15



Issuing Addenda and Changing Documents

Overview

This User Guide describes the steps involved to issue addenda or change any documents after a Job has been published.

Issuing Addenda

Addenda are issued in 360Pro™ via its messaging function.

1. Navigate to the Job you wish to issue addenda for, and click on the two-envelope icon.
2. Edit Subject line (if required), add text to the email, and attach a document (only one attachment allowed – but it can be a zip file).
3. Click on 'Send Emails'. A popup will appear indicating how many providers the message was sent to.
4. The Subject and Email Contents text boxes will be cleared after the addenda has been sent.
5. Navigate back to the Job info Page
6. (Don't press the send button a second time or it will send it again).
7. The yellow envelope icon on the end will list all of the email addresses who were sent the addenda notification

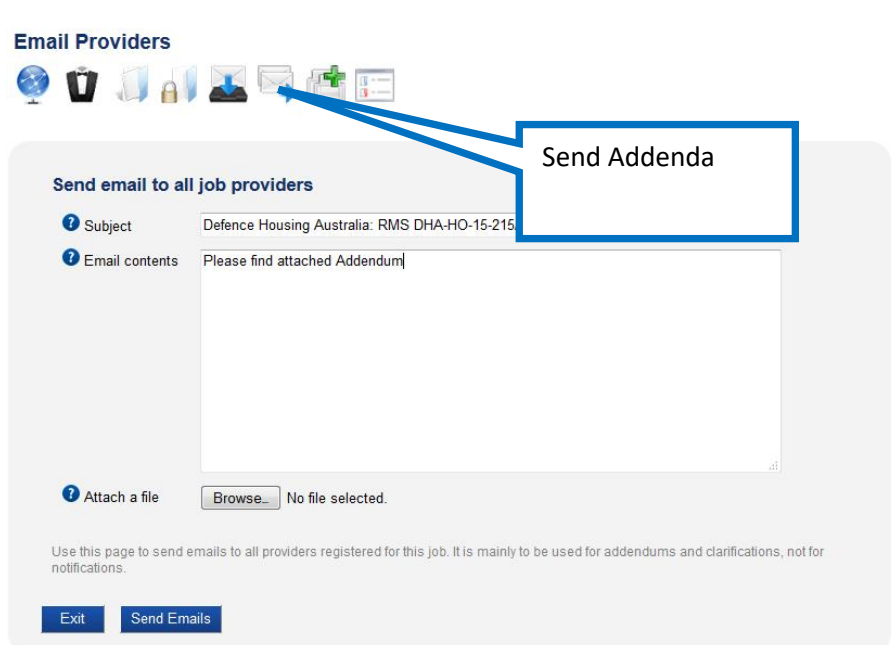


Figure 1 Email providers

The red, flashing message will be shown at the top of the view for the Providers and they will not be able to submit their response until all Job Addenda hyperlinks are opened and the Provider clicks OK on each one.

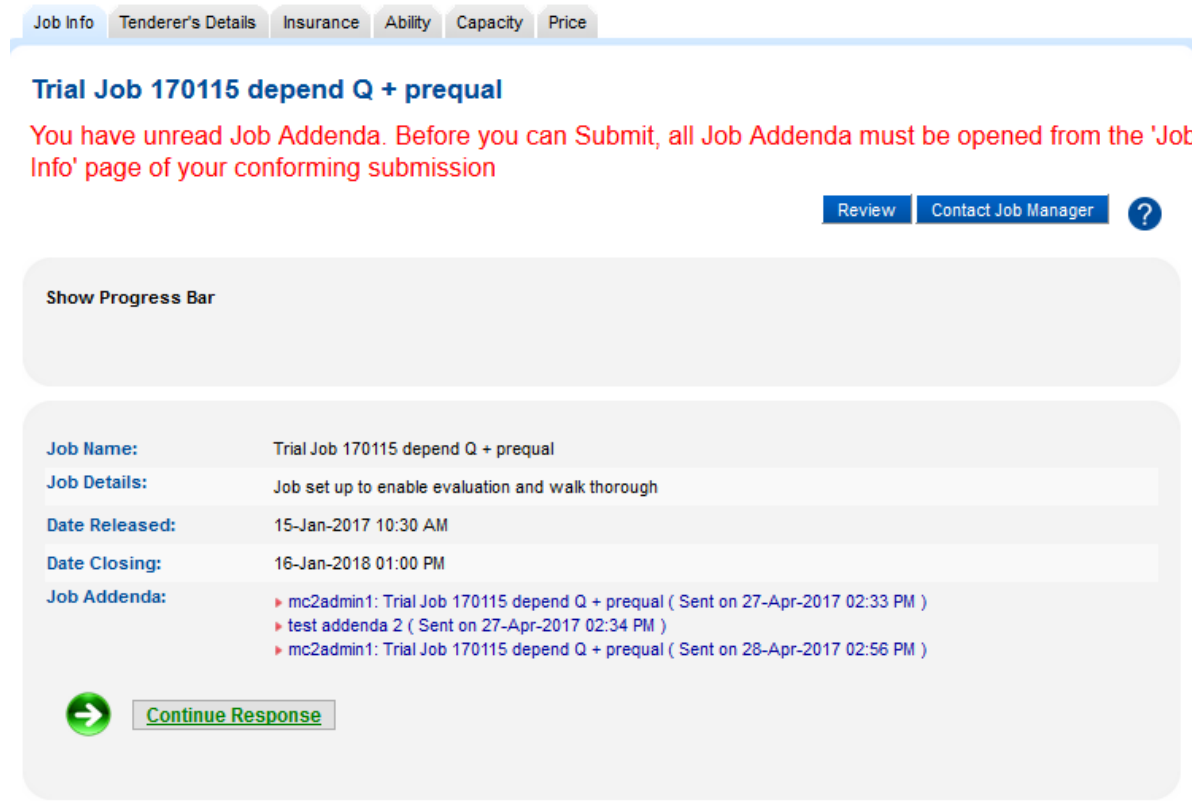


Figure 2 Provider's perspective

This is the first addenda
This is an auto-generated email from 'Apet 360Pro' - the e-tender software of choice. Replies to this address will not be answered.

Figure 3 Email received by Provider

Acknowledgement email

An acknowledgement email option is available to activate by the Boss user in the Templates view of the System Settings. It is an email sent to the provider when they lodge a query via the 'Contact Job Manager' button in 360Pro™; acknowledging that their query has been received.

This email is only activated when text is written in the email contents box (within System Settings). It has to include the following text and 'flags' (i.e. the position of the '#'), but additional text can be added and the signature can be customised accordingly.

Dear #PROVIDERNAME#,
 Your query regarding '#JOBNAME#' has been sent to the job manager.
 Details:
 #SUBJECT#

#BODY#

Kind Regards,

Apet360 Management Team

The acknowledgement email template can also include guidance about the likely timeframe a response to the query will be received (e.g. ‘...your query will be answered within the next 24 hours’) as a way of limiting the number of follow up emails the provider might send regarding their initial query.

Changing Documents

Note: Only documents uploaded on the Job Info tab (Job Management page) can be changed. Documents that have been attached to sections and questions cannot be changed.

System Setting

Before a document is changed, you should check the ‘Document modified email’ email template in the System settings that will be sent to Providers. If there is a message in the Template text box, then the function to send a change notification is enabled.

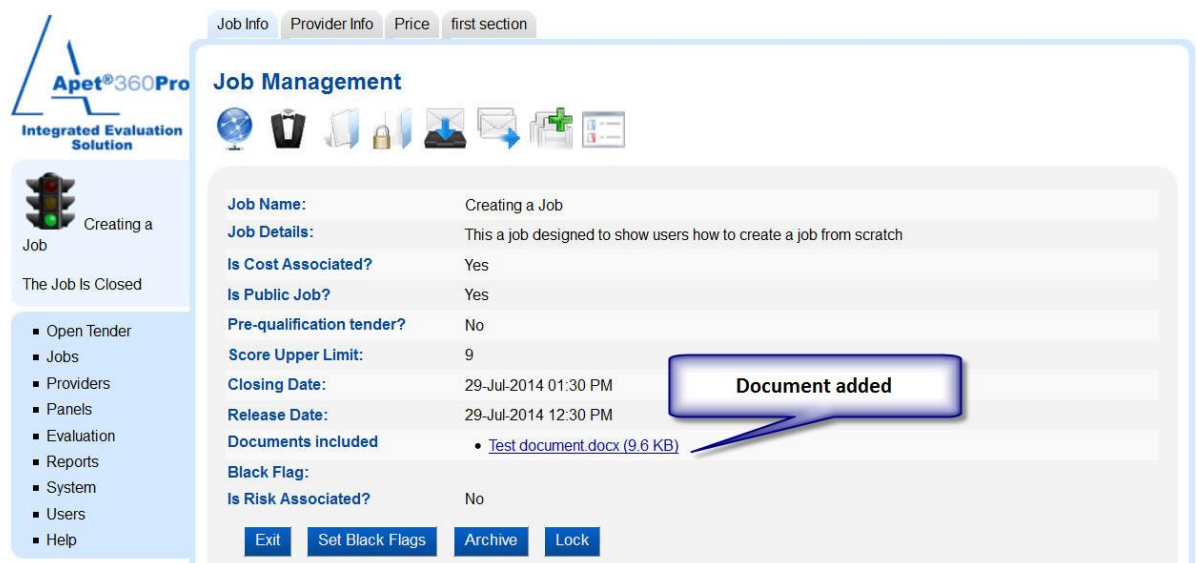
Adding a new document

1. Navigate to the Job and click on the Job Info tab.
2. Click on the ‘Upload Documents’ button
3. Browse to the file that you would like to upload and click Upload.

Removing an existing document

1. Navigate to the Job and click on the Job Info tab.
2. If you would like to remove a document, click on the ‘Upload Documents’ button
3. Click on the word ‘Remove’ (in grey font) beside the document you no longer want included in the Job.

The hyperlink to uploaded documents will be listed on Job Management page (for the User and the Provider) and an email notifying the registered Providers about the new document will be distributed.



The screenshot shows the 'Job Management' page in the Apet360Pro system. The page has tabs for 'Job Info', 'Provider Info', 'Price', and 'first section'. The 'Job Info' tab is active, displaying the following details:

- Job Name:** Creating a Job
- Job Details:** This a job designed to show users how to create a job from scratch
- Is Cost Associated?:** Yes
- Is Public Job?:** Yes
- Pre-qualification tender?:** No
- Score Upper Limit:** 9
- Closing Date:** 29-Jul-2014 01:30 PM
- Release Date:** 29-Jul-2014 12:30 PM
- Documents included:** Test document.docx (9.6 KB)
- Black Flag:** (No options visible)
- Is Risk Associated?:** No

At the bottom of the details section, there are buttons for 'Exit', 'Set Black Flags', 'Archive', and 'Lock'. A blue callout box with a speech bubble points to the 'Documents included' section, containing the text 'Document added'.

Figure 4 User's perspective - Hyperlink to new document

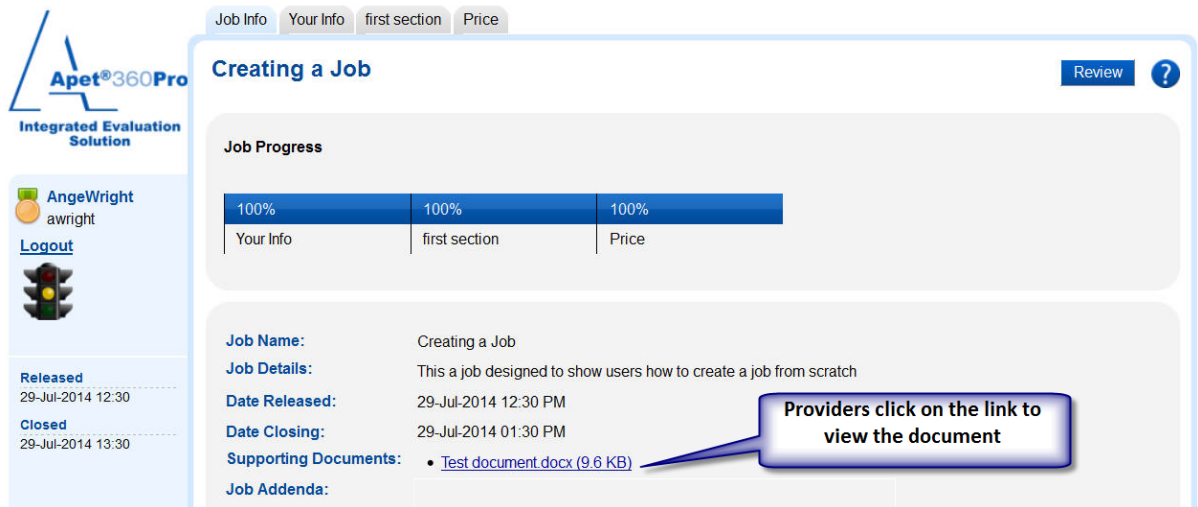


Figure 5 Provider's perspective

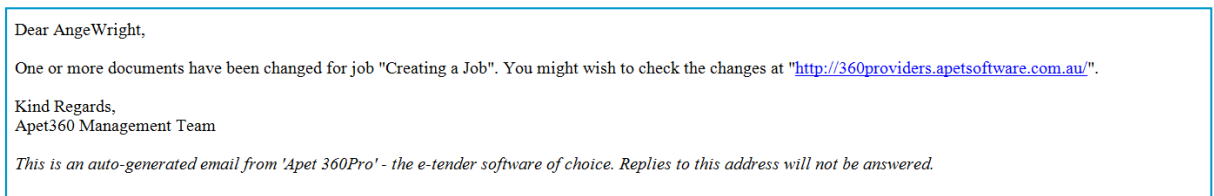


Figure 6 Email received by Provider

Note: It is not a submission requirement for the Provider to read any documents (i.e. they will be able to submit their response without reading any documents; only opening (and ideally reading) addendum is compulsory). Providers are only advised to check the new document.