Apet®360Pro™ Procurement Portal
User Guide 19

Including a Provider after a Job is released and Manual Responses

Overview

This User Guide describes steps involved to add a Provider to a job after it has been published (and before it has closed) and how to add a Provider to the evaluation even though the Job has closed and their response has not been submitted via the Apet® 360Pro™ Provider's Portal (e.g. the response has been submitted via hard-copy). The process of adding a Provider to the closed Job manually means that they can still be included in the evaluation of that Job.

This User Guide also describes the steps involved to attach a document to a provider's response so that it can be included in the evaluation.

Adding a Provider to a job after is has been released (and <u>before</u> it has closed)

Please note: If you publish a job as a 'Public' job (i.e. you do not add any Providers via the Globe icon) and then you add a provider via the 'Include Live Provider' button (available after a job is published), this will <u>not</u> make the job a restricted/private job (as it has already been published as a public job).

In order for a job to be published as a restricted/private job to begin with, you have to add the selected Providers to the Job via the Globe icon before it is published.

Adding a Provider to a job after is has been released (and <u>before</u> it has closed)

1. Navigate to the Globe icon (Providers) within the Job
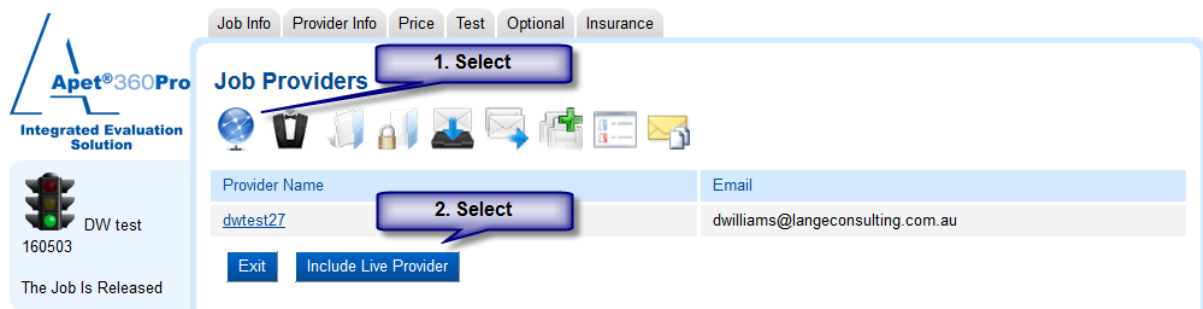2. Click on 'Include Live Provider'

Figure 1 Add a 'Live' Provider to Job

3. Select the Provider from the list provided (the Provider has to be already listed in your account). If you want to add multiple 'live' Providers, hold down the ctrl key while you select them.
4. Click Add.
5. The 'Live' Providers will be listed on the Job Providers view and they will also receive the same Job Published email that the original Providers received.

Adding a Provider of Manual Response (i.e. Adding a Provider to a job after it has closed)

If a Provider has not submitted their response via 360Pro but you would still like them evaluated with other Providers, you can add them as a 'manual' Provider. This process is similar to putting a 'placeholder' in the evaluation view, so that the manual Provider can be included in the evaluation even though they haven't submitted their response in 360Pro.

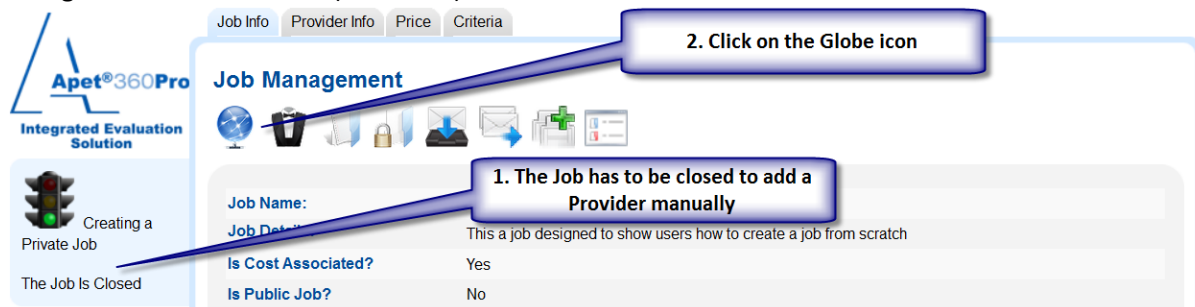1. Navigate to the Globe icon (Providers) within the Job

Figure 2 Add Provider to Job after it has closed

2. Add the Provider of the manual response
   2.1. If the Provider is already a listed provider in your account, click on 'Add Provider' and select from the Providers listed.
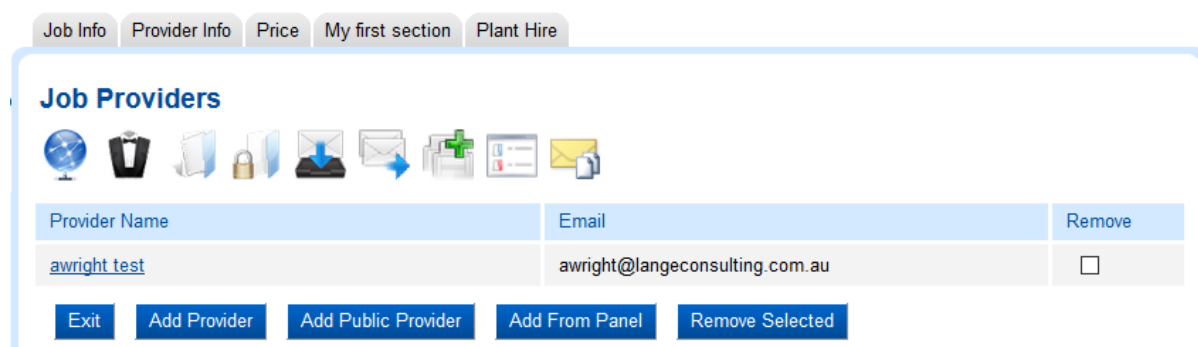   2.2. If the Provider is a Public Provider, Click on 'Add Public Provider'.

Figure 3 Selecting a Provider

   2.3. The Provider name should then be listed amongst the other Providers.

Figure 4 Provider now listed

NOTE: If the Provider who has submitted their Job via hard-copy **had already registered** for the Job via 360Pro™ (but their response was not submitted via the portal) they will already be listed as a Provider on the Job Providers page. Because you want to list their response as a Manual Tender, you will need to add another Provider account with a slightly modified name to represent this to that Job.

360Pro™ cannot have duplicate Provider accounts/names. For example, set the Provider name to include the words "(Manual Tender)" beside their name – e.g. "Skies are Blue (Manual Tender)".
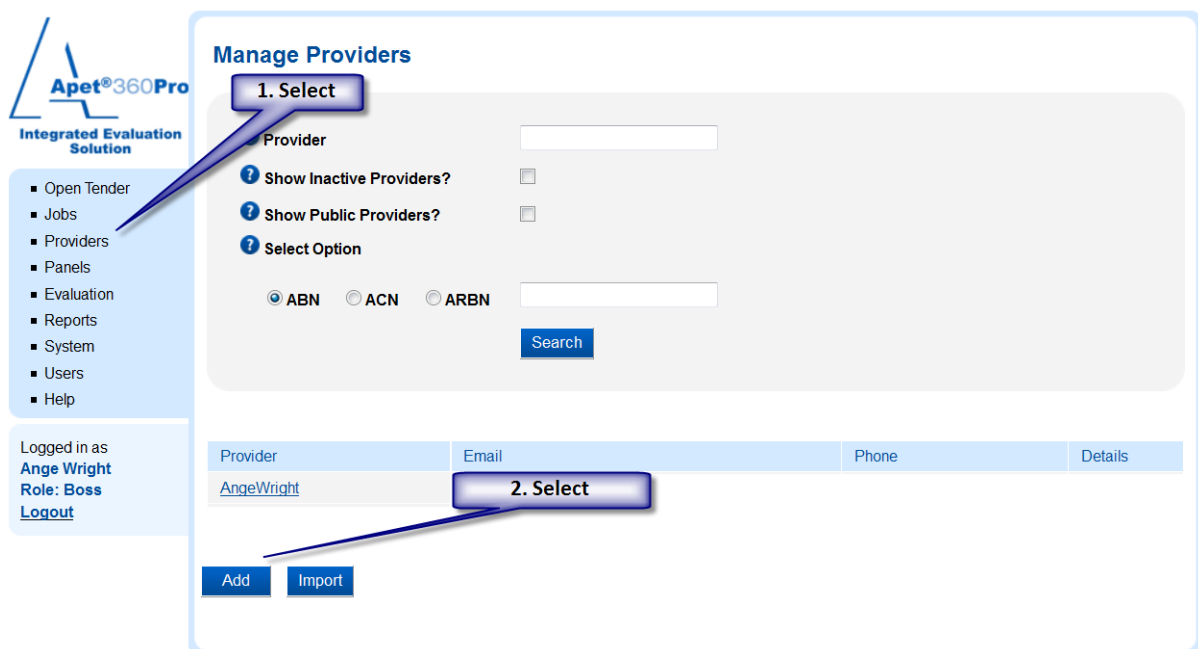

Figure 5 Adding a Manual Provider

3. When evaluating their tender responses, "Manual tender" will be listed beside the different Sections/Questions, and the evaluator is able to score and comment accordingly.
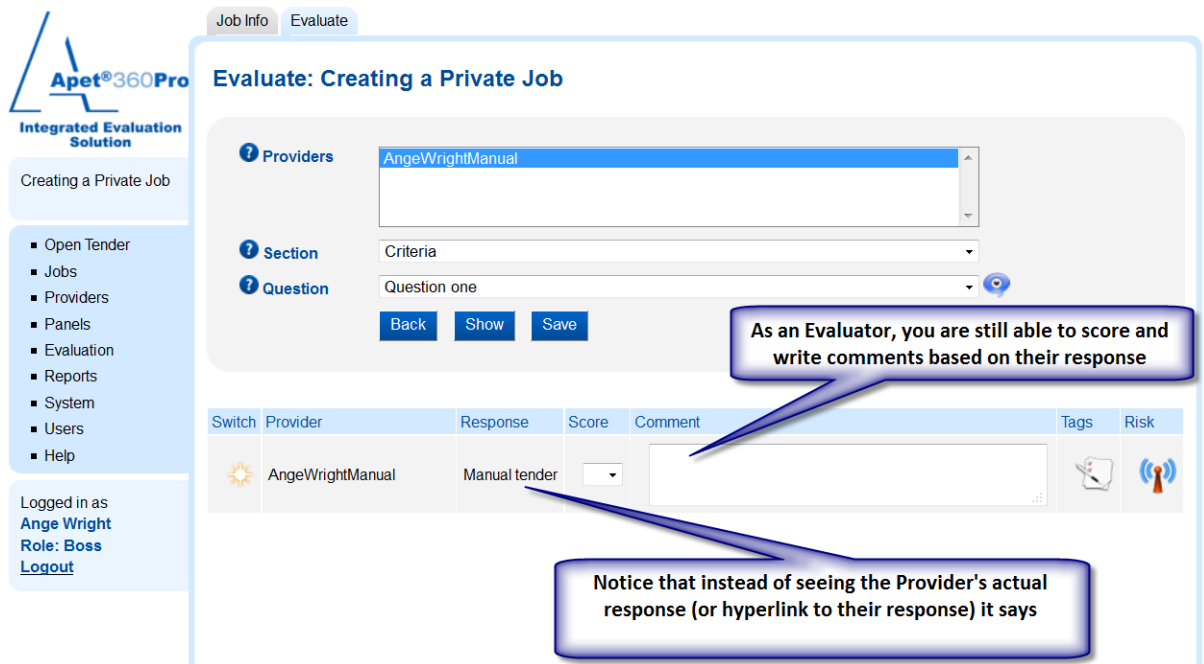
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Figure 6 Provider added to evaluation

Adding a document against a manual tender submission

Users are able to add document(s) against a Provider (including manual tenders) that is available to view during the evaluation process.

1. Documents can only be added after the job is <u>closed</u>.

2. Documents are uploaded via the 'Manage Black Flags and Documents' button on Job Info tab.
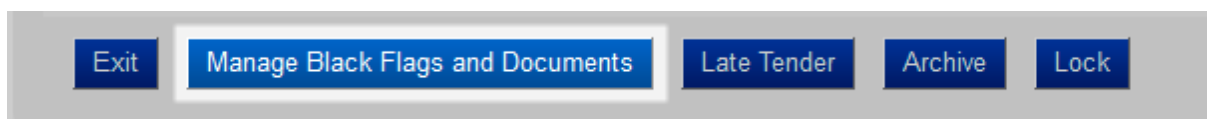

Figure 7 Adding Documents to a Provider's response

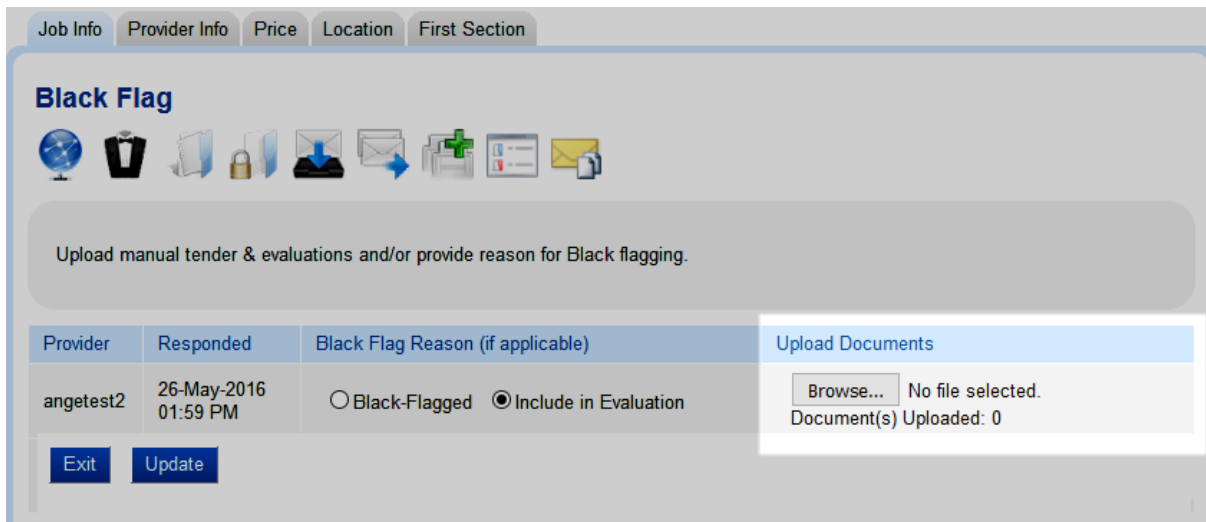3. Under the Upload Documents column, browse to the selected file.

4. Click Update.

Figure 8 Browse and upload document(s)

5. Evaluators view attached documents for the Job via the Documents Uploaded link on the right hand side of the Evaluation view.
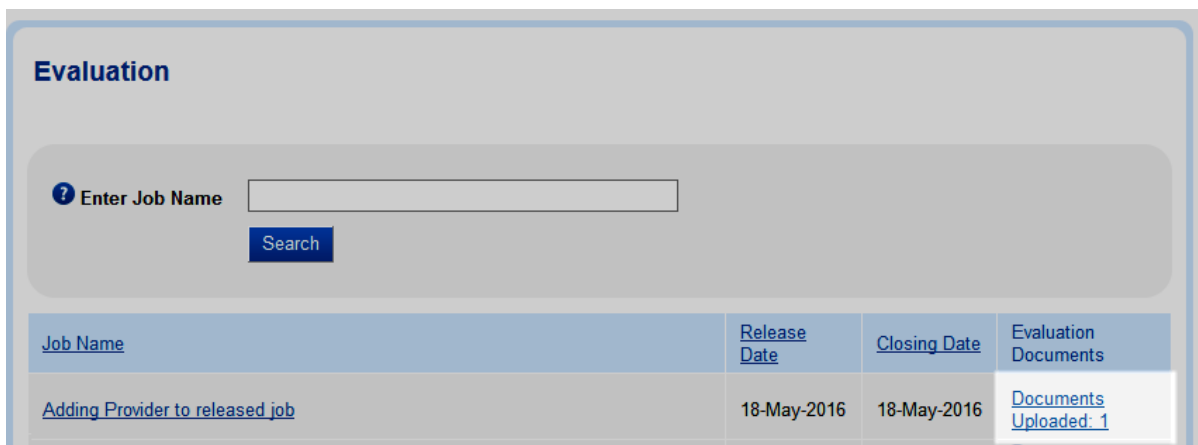

Figure 9 View documents in Evaluation view

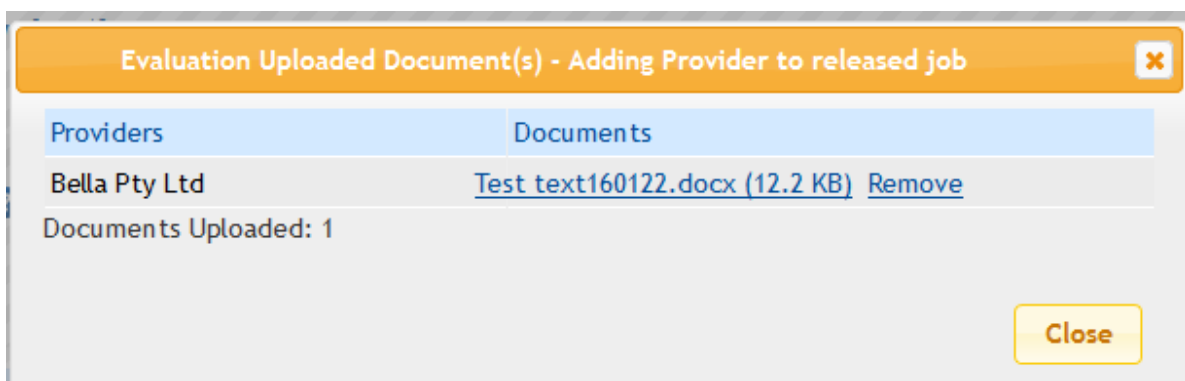6. Documents are viewed (and or removed) from the Evaluation Uploaded Document(s) dialogue box.

Figure 10 View & Remove Documents

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When the Provider Response Report is downloaded, any documents that have been added to the Job via the above process are flagged as '[Evaluator Uploaded]' documents in the file name.

Name	Type	Compressed size	Password ...	Size
[EVALUATOR_UPLOADED_]Test_tex...	Microsoft Word Document	10 KB	No	

Figure 11 File name of User uploaded documents