

Apet®360Pro™ Procurement Portal User Guide 20



Evaluating Tenders – For Boss users

Overview

This User Guide describes steps to complete a tender evaluation.

1. Default Evaluation Settings

Before entering the Evaluation screen/s, the Boss User needs to check default evaluation settings in the System section of 360Pro™.

Comments Mandatory: If 'Comments mandatory' is selected, Evaluators have to make comments for all questions.

Provider Based / Section Based Evaluation: To evaluate your Job, make sure your evaluation settings are updated to have the option to evaluate per provider and/or per section (check the Systems, Evaluation boxes for Provider Based Evaluation and Section Based Evaluation).

Non-Conflict Confirmation Required: If enabled, each Evaluator assigned to evaluate a Job will have to confirm they have no conflict of interest with any of the Providers who have responded to the Job before being able to evaluate responses. By default, this setting is not selected.

Number of openers: An 'Opener' is a role that can be assigned to a user to 'open' a tender once it has closed for evaluation purposes. If the 'Number of openers' has been set to ≥ 1 , a 'Select Openers' box will appear in the 'Users' tab to set the user assigned to that role.

Depending on any restrictions made by the Boss User, certain evaluators may only be able to evaluate certain sections (e.g. one user may have been selected to evaluate technical responses and another evaluator only reviews financial/pricing responses). See User Guide 21 on Restricting Evaluators.

2. Log in to Apet®360Pro™

Each evaluator will receive an Apet® 360Pro™ account from the Boss. To conduct the evaluation, login to Apet® 360Pro™ using your evaluator Username and Password.

1. Click on Evaluation from the main menu
2. Select the Job to evaluate

3. Non-conflict of Interest Declaration

If the Non-conflict of Interest declaration function has been enabled in the System settings, after the evaluator clicks on the Job name, and they click on the Sections or Providers buttons, it will take

them to the Evaluation Confirmation view. From here Providers who submitted a response to the Job will be listed and the evaluator clicks on 'I have no conflict of Interest' button and enters their 360Pro password (as a form of electronic signature). After the declaration has been made, the evaluator can begin their evaluation.

The date and time the Evaluator made their declaration will be included in the *Evaluation plus risk* report.

If the evaluator does identify a potential conflict of interest, they need to click 'Cancel' and speak directly to the Job Manager/Boss.

Evaluation Confirmation

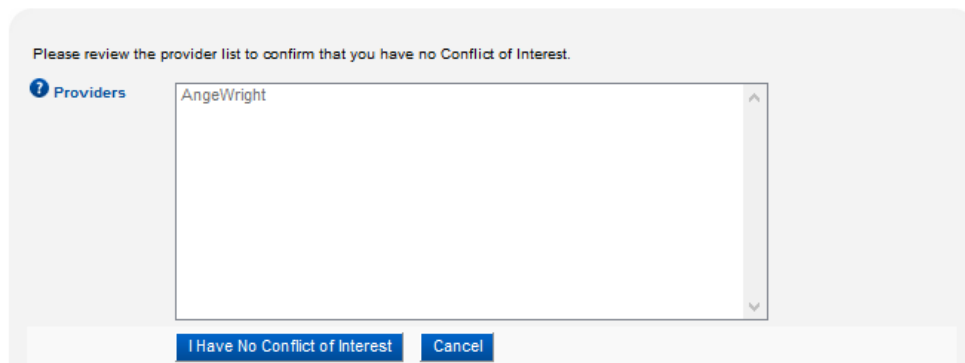


Figure 1 Non Conflict of Interest declaration

4. Evaluate via Sections

If you would like to evaluate a Provider against all sections, click on the **Sections** button. Evaluating via Sections allows you to review a Provider's response in its entirety before moving onto the next Provider.

1. Click on the "Sections" button

The next view will list all the Providers who have submitted their responses for this Job.

You can also use the Provider search functionality provided on the tab to search for one or more Providers. To search for one or more Providers, simply enter full or part of the Provider name.

You can also search Providers based on their business registration number. Click 'Search' after entering your search criteria to search for Providers.

2. To evaluate Provider responses, click on the Provider name in the Provider list. Don't evaluate 'black-flagged' Providers as they have been excluded from the evaluation.
3. Select the tab corresponding to the section that you wish to evaluate



Figure 2 Select a section to evaluate

4. You will then be able to view the Provider's response to Selection Criteria questions and any attachments such as CVs, Past Experience Statements etc.
5. The two-person icon next to the Provider name in Figure 2 allows you to switch to another Provider
6. Click "Save" to save your work.
7. Click "Previous" to save your work and move to the previous section or Tender.
8. Click "Next" to save your work and move to the next section or Tender.
9. Click "Cancel" to remove your entry and return to the last saved score and comment.

5. Evaluate via Providers

If you would like to evaluate all/multiple Providers against a specific section/question, click on the **Providers** button on that Job Info tab. Evaluating via Providers allows you to review all Providers' responses one question at a time.

1. Select Provider to start the evaluation
2. Hold the Ctrl key to select multiple Providers
3. Select the section and questions to evaluate
4. Enter/Select the score and enter your evaluation comments for the relevant Providers
5. Click Save
6. Select the next question from the Question drop down box (or move onto another section by selecting another section from the Section dropdown box)

6. Switch view

If at any stage during your evaluation you'd like to switch from evaluating via sections to evaluating via providers or vice-versa, simply click on the 'yellow sun' icon in the 'Switch' column on the left hand side (shown in figure 2).

7. Scoring

Based on all the information submitted by the Provider, you can score each response against each question by selecting appropriate value from the score list.

Record your scores and comments for each Tender in the space provided (as shown in Figure 4).

Some Accounts may be set up to force a comment to be entered.

Some Accounts may have enabled Evaluation Guidance functionality to prepopulate a score and/or comments based on the score selected via the chalkboard icon (located under the score dropdown box). You can add additional comments to the prepopulated comments.

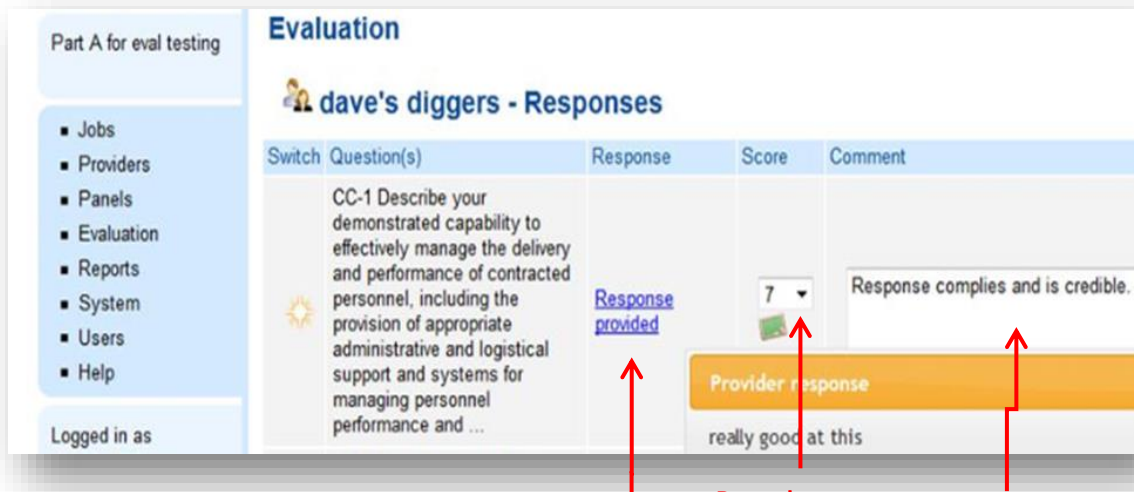


Figure 3 View response, enter score and comments

Record your score here, e.g. 7/10

The comments may be prepopulated based on the score selected from the chalkboard OR you may have to record your comments, including reasons for your score.

Click here to view the Tenderer's response to the relevant Selection Criteria question

Important Point to Note: All comments written by the evaluators in the evaluation of Tenders will be used to inform the Details Report and for debriefing Tenderers, so these comments should be clear, objective and defensible.

8. Info Tags

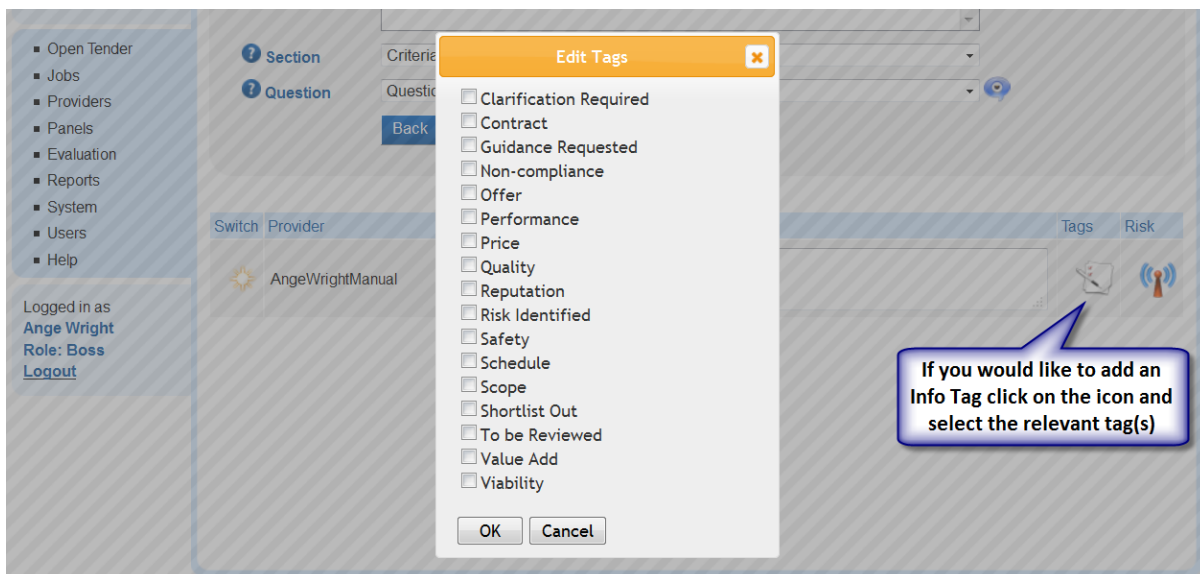


Figure 4 Info tag

9. Risk

- If you identify any risks associated with a response, please do not incorporate this 'risk' into the technical score you assign (i.e. the score out of 10). Instead, you may 'flag' the risk, by clicking on the "Info Tag" icon for that particular Selection Criterion (as shown above).
- Select ok

(c) The evaluation team can then run an info tag report and compile a Risk Profile for the Offer.

10. Save and Next

Click Save to save your score, comments and/or info tags, and then click Next to save your work and move to the next section or Tender.

Do not write comments and then walk away without saving as the system will time out and you will lose your work.

11. Status

At any point during the evaluation, you can check on the status of the evaluation as the logged on User by clicking 'Status' from the main Evaluation page.

To see the status of the evaluation for all Evaluators, go to Reports and run the Evaluation Status report (if the report is blank that means the evaluation has been completed by all evaluators). If there are questions displayed in the report alongside an Evaluator's username, those questions are yet to be scored by that evaluator.

When the evaluation is complete, the Manager is able to Lock the Job (User Guide 27) if they do not want any further changes made to the evaluation (particularly after reports have been created and a provider has been awarded).

The next step is to produce report(s) based on your evaluation to determine the preferred Provider. See User Guides 23 for Job Reports, User Guide 24 for Export to Excel Ad-Hoc Reports, User Guide 25 for Administrative Reports and to award a Job see User Guide 26 for Awarding a Job.