

## Apet®360Pro™ Procurement Portal User Guide 26



### Completing (Awarding) a Job

#### Overview

This User Guide describes the steps involved to award (or non-award) a Job to an individual Provider or multiple Providers.

#### System Settings

Before awarding a Job, check the default email templates (in System settings) to customise the email text that will be sent to successful and unsuccessful Providers.

#PROVIDERNAME# and #JOBNAME# are required in the email templates.

It is optional to include the following tags (#REASON#, #AWARD\_COMMENTS#, #PRICE#) – they **are** included in the templates by default. These fields are discussed in detail below.

? Job awarded - email to chosen provider	Dear #PROVIDERNAME#, You have been chosen for '#JOBNAME#' because of #REASON#. #AWARD_COMMENTS# The winning price #PRICE# Congratulations. Kind Regards, Apet360 Management Team
? Job awarded - email to other providers	Dear #PROVIDERNAME#, You have been unsuccessful for '#JOBNAME#' #REASON#. #AWARD_COMMENTS# The winning price #PRICE# Good luck for future jobs. Kind Regards,
? Job not awarded	Dear #PROVIDERNAME#, '#JOBNAME#' has not been awarded Good luck for future jobs. Kind Regards, Apet360 Management Team

Figure 1 Award Job Email Templates

#### Approval to Award a Job

Boss Users can elect to switch on the Job Completion Approval functionality via Job Settings in System. By default, this functionality is switched off.

Job Completion Approval allows the Job Manager to complete the Award page following an evaluation. The Job Manager enters in the relevant details and before they can Award or Non-Award the job, they have to click on the 'Request Job Completion Approval' button first.

Clicking on this button sends an email to the User who has been assigned as the Job Awarding Approver (the User is assigned via the Tuxedo icon). The Approver is able to login and review the

details entered by the Job Manager on the Award page (in a read-only capacity) and either grant approval or deny approval for the Job Manager to Award (or Non-Award) the Job.

Whether approval has been granted or denied, the Job Manager will receive an email advising them of the decision. If the Job Awarding has been approved, the Job Manager can login and award the job. If Job Awarding has been rejected, the Job Manager will need to contact the Approver and find out what needs to be edited, make those changes and send for Job Awarding Approval again.

The Boss User is able to approve/reject a job for awarding even if they are not an assigned Approver for that Job.

The date and time approval was granted or denied is captured in the Evaluation plus Risk Report.

## Awarding a Job

Now that all responses have been evaluated and a preferred provider(s) selected, the Job may be awarded:

1. Select Jobs from the main menu.
2. Select the Job to award.

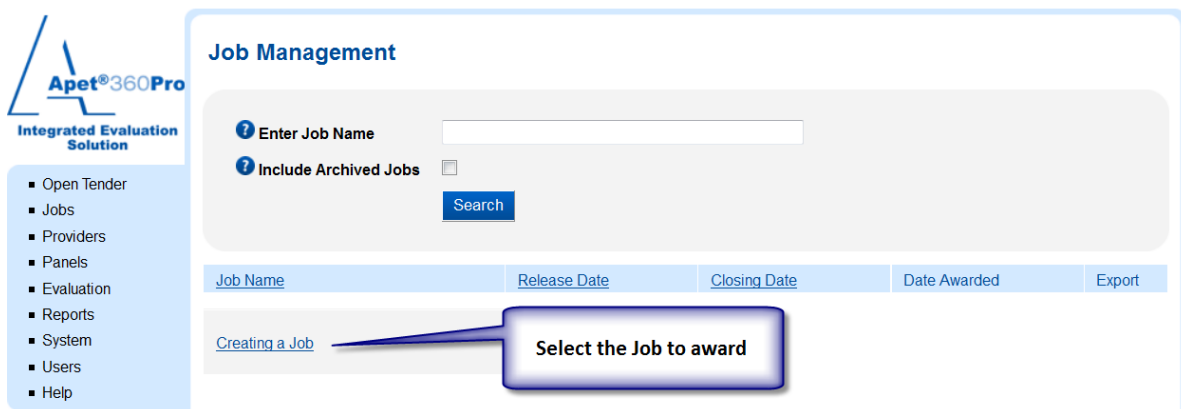


Figure 2 Select the Job to award

3. Select 'Complete Job' at the bottom of the Job Info tab

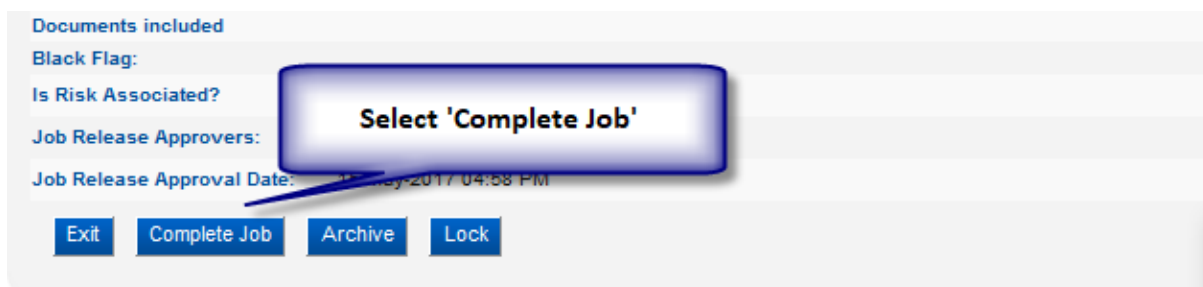


Figure 3 Award the job

4. Select the preferred Provider(s) using the checkboxes.

Job Info Provider Info Price Location First Section

### Award Job

**Select Awardees**

anetest2  
 anetest3  
 awright test \*

**Reason for Awarding**

Availability \*

**Winning Price**

Lowest NPV: n/a Highest NPV: n/a

**Internal Comments**

Note: Internal comments are NOT sent to Providers; they are for internal record-keeping purposes only.

**External Comments**

Note: External comments will be sent to Providers (who were successful and who were not successful) in an email.

Figure 4 select the preferred provider(s)

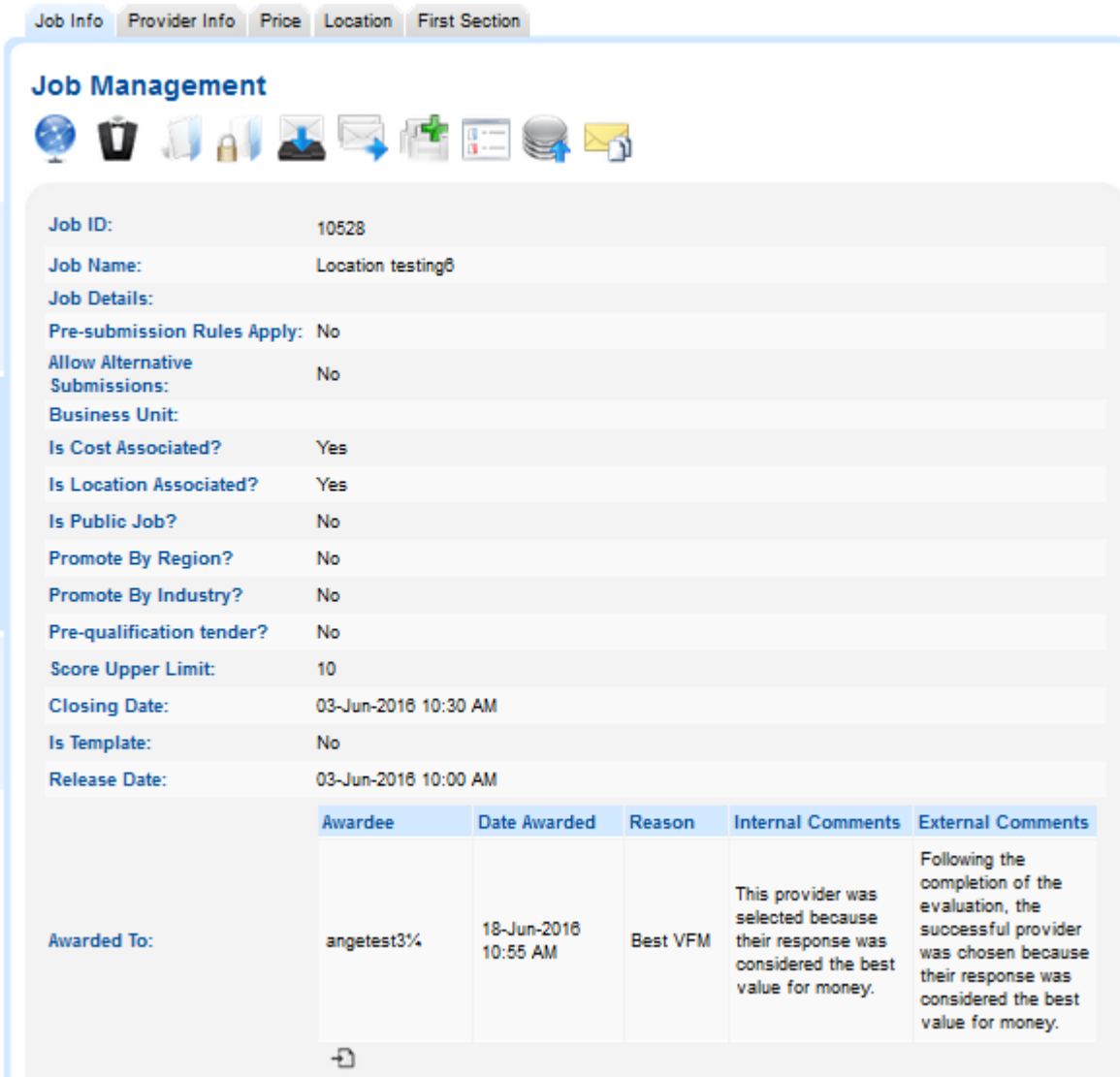
5. You can select the **reason** (#REASON#) for the decision via the Reason for Awarding dropdown box (Award Reasons are created in the System settings by Boss Users).
6. The **winning price** (#PRICE#) is a text field (you can enter numbers, text and dollar signs) the winning price or the price range (e.g. 'between \$1500-\$2000').
7. The **Internal Comments** enable you to enter reasons which are for internal record-keeping purposes only (these comments will also be displayed on the Job Info tab, the Evaluation plus Risk and the Job Listing reports).
8. The **External Comments** (#AWARD\_COMMENTS#) enable you to enter reasons which **are sent to the Provider** via the Job Award email (these comments will also be displayed on the Job Info tab, the Evaluation plus Risk and the Job Listing reports).
9. Click 'Award Job (Notify Providers)'.\*  
 \* If 'Job Completion requires Approval' has been switched **on** in system, the Job Manager needs to click on 'Request Approval to Complete Job' and wait for Awarding Approver to grant approval to award (Job Manager will be notified by email when this has happened)
10. Apet® 360Pro™ automatically sends an award email to the preferred Provider and decline emails to the other unsuccessful Providers.
11. The Boss user is automatically BCC'd on the Job Award email (successful and unsuccessful).

Dear awright test,  
 You have been chosen for 'Location testing18' because of Best VFM.  
 Following completion of the evaluation, the successful provider was chosen because their response was considered the best value for money.  
 The winning price between \$1000-\$2000  
 Congratulations.  
 Kind Regards,  
 Apet360 Management Team

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

Figure 5 Award email text

12. Details will be displayed on the Job Info tab (and also included on the Evaluation plus Risk Report, Job Listing report and the Results report). You can export a copy of the awardee's response via the folder icon with the sideways arrow.



The screenshot shows the 'Job Management' interface with the 'Job Info' tab selected. The job details are as follows:

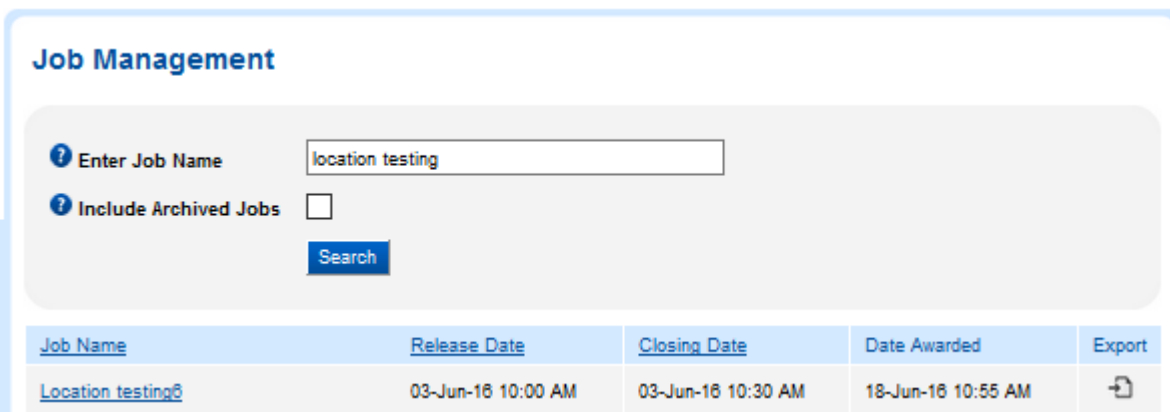
- Job ID: 10528
- Job Name: Location testing8
- Job Details:
  - Pre-submission Rules Apply: No
  - Allow Alternative Submissions: No
  - Business Unit:
  - Is Cost Associated?: Yes
  - Is Location Associated?: Yes
  - Is Public Job?: No
  - Promote By Region?: No
  - Promote By Industry?: No
  - Pre-qualification tender?: No
  - Score Upper Limit: 10
  - Closing Date: 03-Jun-2016 10:30 AM
  - Is Template: No
  - Release Date: 03-Jun-2016 10:00 AM

The 'Awarded To' section contains a table with the following data:

	Awardee	Date Awarded	Reason	Internal Comments	External Comments
Awarded To:	angetest3¼	18-Jun-2016 10:55 AM	Best VFM	This provider was selected because their response was considered the best value for money.	Following the completion of the evaluation, the successful provider was chosen because their response was considered the best value for money.

Figure 6 Award details displayed on the Job Info tab

13. The job award status is updated on the Job Management page.



The screenshot shows the 'Job Management' search interface. The search criteria are:

- Enter Job Name: location testing
- Include Archived Jobs:
- Search button

The resulting table shows the job award status:


Job Name	Release Date	Closing Date	Date Awarded	Export
<a href="#">Location testing8</a>	03-Jun-16 10:00 AM	03-Jun-16 10:30 AM	18-Jun-16 10:55 AM	

Figure 7 Job award status

## Re-Awarding a job

If necessary, Users are able to re-award a job to another Provider.

Follow the steps above for Awarding a Job, but you'll need to enter an additional audit 'Reason for Change' and then click 'Edit' before re-awarding a job. A Job Awarded email (successful and unsuccessful) will **not** be sent out if a job has been re-awarded.



Figure 8 Re-awarding a Job

## Non Award

If necessary, Users are able send out an email if the Job hasn't been awarded to any Provider.

Before non-awarding a Job, check the default email templates (in System settings) to customise the email text that will be sent to the Providers who responded to the Job.

1. From the Job Info page, click Complete Job.
2. Do not select any of the providers in the 'Select Awardees' section.
3. Select a Reason.
4. Enter your Internal and External Comments.
5. Click 'Complete Job – No Awardees (Notify Providers)' at the bottom of the view.
6. Apet® 360Pro™ automatically sends a non-award email to the Providers

## Lock and Achieve an Awarded Job

To lock and or archive a Job once it has been awarded, see User Guide Lock and Archive a Job.