

## Apet®360Pro™ Procurement Portal User Guide 28



### Structured Data Fields

#### Overview

This User Guide describes the steps to create structured data field questions within a Job. This guide is a follow on to User Guide 3 Creating and Configuring Questions.

#### Background

Structured data fields allow the gathering of details from providers/tenderers on-line yet in a structured format. In the past providers had a free text on-line field to provide information in response to questions, clauses, evaluation criteria etc.

With structured data, if you ask for an ABN Look-up, Providers have the ability to check their ABN via the Check Number button or look up their ABN details via the ABR Look-up button.

If you ask for an email address or a URL, the data entered by the tenderer will need to be in a correct email or URL format to be successfully saved.

You can set provider response fields to gather currency information; such as an hourly rate for providing services. But in the case of currency, you can also set max/min amounts. These amounts help providers avoid typo trouble when entering prices; i.e. if the max/min is set to \$150/\$100 and the tender accidentally tried to save \$1,000; a warning message will appear and allow the provider to enter and save the correct value.

What this feature then allows is convenient reporting (Export to Excel) of these structured data details and interface data from 360Pro into other systems.

#### Function

When entering a question (manually or via csv import) you can control the format of the Provider's response field. You now have these options:

Structured Data Fields	Import code for the csv file (column K)	Response Format	Limits available
Text	T	Text (multi-line comments); default	Max character limit incl spaces
ABN (with ABR lookup)	A	Provides the facility to lookup an ABN	yes
ABN (with read-only ABR lookup)	a	Provides the facility to lookup and insert ABN, ACN/ABRN, Entity Name, Business Name, Trading Name. Earliest Registration Date. Response <b>cannot</b> be edited	n/a

Structured Data Fields	Import code for the csv file (column K)	Response Format	Limits available
Text Short	S	Text (single line of comments). Not a large (height) text box	Max character limit incl spaces
Date	D	dd/mm/yyyy	Min and Max
Currency (incl 2 decimal places)	\$	\$123.45	Min and Max
Integer Number	I	123,456	Min and Max
Integer values only without commas	#	123456	Min and Max Max character limit incl spaces
Decimal Number (incl 2 decimal places)	N	123.45	Min and Max
Multi-select	M	Checl box options (see User Guide 30)  <input type="checkbox"/> Canberra	N/A
Web site address	W	http://www.example.com	
Email address	E	someone@example.com	
Responses Without Comments	B	Drop-down box with pre-defined statements	N/A

## Creating a Structured Data Response Type in CSV Import File

Open your csv import file, and enter Job details as you normally would; job name and details, closing date/time, relevant cell flags (J, CT, Q, S, RAMWS etc), score upper limit, section headings, question names, evaluation guide (if applicable), and relevant weights etc. Add the relevant Response Type flags to Column K and any min/max restrictions. Please note all import flags in the csv file in column K have to be **capitalised**.

Column A Enter the necessary Job, Section and Question flags

Column B Enter the necessary flags to set the properties of the question/response (eg R - Allow Response, M - Mandatory, W - Weighted, A - Allow Attachments)

You have the option to make structured data response type questions **scorecard questions** in your csv file by placing an 'S' in column B.

Column C Enter the relevant section and question **weights**

Column D Enter the **question or Section Name**

Column E Enter the **evaluation guide** (if applicable)

Column F Enter the relevant **statements** (see points 8 and 9 below for clarification)

Column G Set the character limit (**response length**); default is blank

Column H	Contains the list identifier for the <b>multi-select list</b> .
Column I	Enter a short <b>description</b> of the row. This will be used for export column headers. There is a maximum of 25 characters for this field.
Column J	Enter <b>question notes</b> that will be visible to providers when responding to that question (if applicable)
Column K	Enter the relevant <b>response type</b> flag (import codes listed in the table above, \$ - Currency, D – Date, I – Integer etc)
Column L/M	Column L is <b>minimum</b> value allowed and Column M is the <b>maximum</b> value allowed in the correct response format. If minimum or maximum values are left blank, then no restrictions will apply. <b>IMPORTANT: Max/min validation errors in your csv file will only “kick in” if you open/view your questions in 360Pro™ after importing your job and before publishing.</b>
<u>Column N</u>	By placing TRUE in Column N against a series of questions (in scorecard configuration), it allows the Provider to ‘Skip’ that series of Scorecard questions if all the questions on that scorecard are set to TRUE.

Save your csv file, import it into 360Pro™, open and view your questions to check for any validation errors, finalise the remaining job details, and then publish.

### Manually Creating a Structured Data Response Type in 360Pro™

1. Navigate to the Job Management page; create your Job name and Sections names.
2. Add a question to your relevant section and enter the question name, notes, whether the question is mandatory, whether attachments are allowed, and weighting details etc.
3. Select the **Response Type** from the drop down box. *Text (multi-line comments)* is the default Response Type (options listed in the table above).
4. For *Text (multi-line comments)* and *Text (single line comments)*, you are able to set a **Response Length** (character limit including spaces).
5. For *Date*, *Decimal*, *Integer* and *Money* Response Types, a **minimum and maximum value** can be entered. If minimum or maximum values are left blank, then a restriction will not apply.
6. Validation **errors** will appear if minimum exceeds maximum or if data in those min/max fields has been entered in an incorrect format (e.g. Date entered as 1/2/13 instead of 01/02/2013).
7. With the exception of *Text*, when structured data Response Types are selected manually they will **default to a scorecard question** (questions designed to be contiguous on the screen, i.e. they sit under each other; and are specifically designed to handle questions that can be answered with a structured value, eg Yes or No statements, where usually there are no explanatory comments required). You can un-check the ‘Is Scorecard?’ box after you choose the Response Type.
8. Select the statement/statements from the **Statement List** you would like your providers to choose from (see section below on statement List for different alternatives)
9. Once all question details are entered, click **Add**.
10. **Finalise** the remaining job details.
11. **Publish**.

## Statement List:

Whether structured data field questions are created via csv import file or manually, you have the option to allow providers to choose from **multiple statements** (e.g. Response provided, or Comply etc) that will accompany their response (Figure 2 and 3).

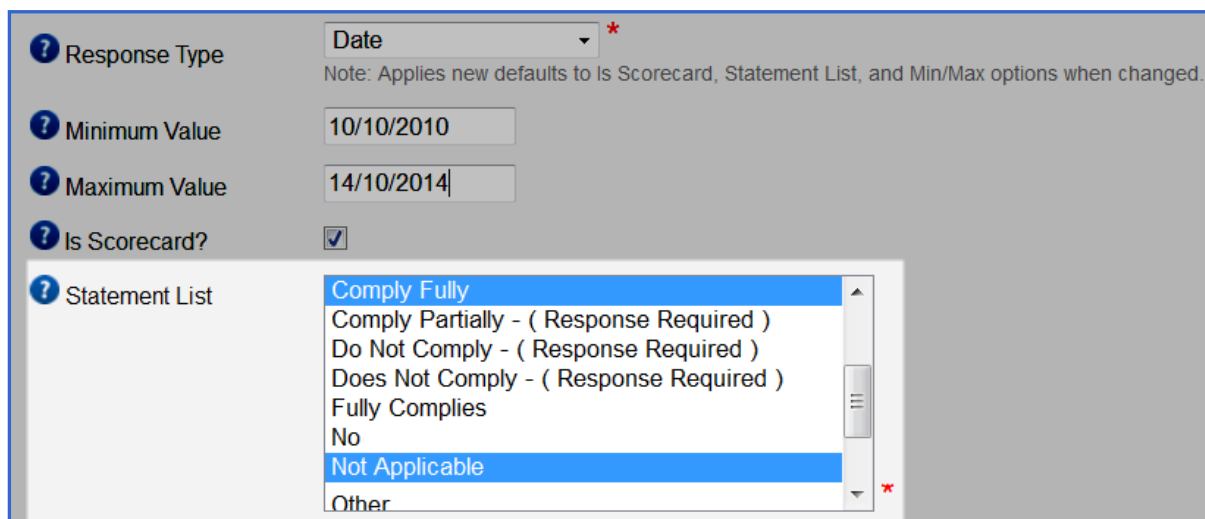


Figure 1 360Pro™ User's perspective - select at least two statements to provide statement options for your providers to choose from

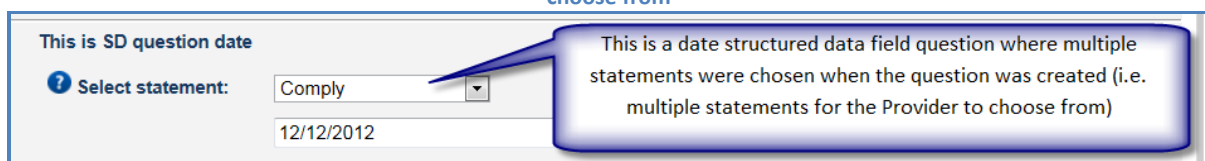


Figure 2 360Pro™ Provider's perspective (Structured data field question with multiple statements to choose from)

Alternatively, if you would like to remove the need for your providers to select a statement when they are responding to a structured data field question, simply chose only **one statement** when you are creating your question (e.g. Response provided):

- Manually creating your question in 360Pro: Select only **one** statement from the Statement List and 360Pro inserts the single statement into the option box in the background (Figure 4).
- Creating your Job via csv Import: Add **one** statement to the cell in Column F alongside your question in your csv file and 360Pro inserts the single statement into the option box in the background.

Therefore, the **“Select statement” dropdown box is hidden** and there is only a text box for providers to enter their response (Figure 5), streamlining the response process for providers.

Figure 3 360Pro™ User's perspective - select one statement to remove/hide the 'Select statement' dropdown box

Figure 4 360Pro™ Provider's perspective (Structured data field question with no statement to choose from, 'Select statement' dropdown box is hidden)

## Responses without Comments

If you would like Providers to answer a question with a choice of pre-defined statements only (i.e. no option to write any comments/no response box; Figure 6), Follow the steps below:

Figure 5 360Pro™ Provider's perspective (Structured data field question with no response box, only the 'Select statement' dropdown box is available)

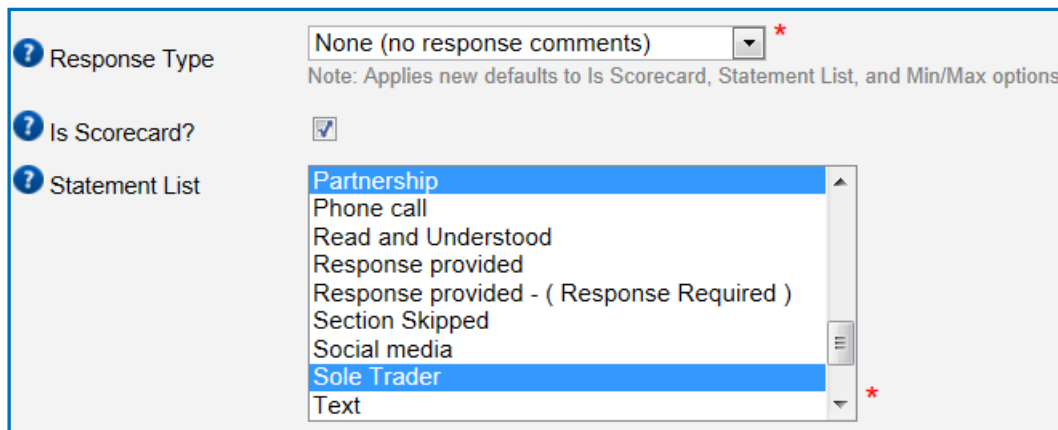
- Place a 'B' in Column K (Response Format Column) and enter the relevant statements in Column F of your csv file (Figure 7),

	A	B	C	D	E	F	G	H	I	J	K
6	S			Tenderer's Details:							
7	Q	RS		Legal entity type of your business:		Sole Trader, Company, Partnership, Trust					B

Figure 6 360Pro™ User's csv import file - Put a B in Column K alongside the question to only allow the Provider to respond via a pre-defined statement

OR

- Manually select "None (no response comments)" in Response Type section of the question set-up page and select the relevant statements in 360Pro (Figure 8).



The screenshot shows a configuration window with the following elements:

- Response Type:** A dropdown menu set to "None (no response comments)". A red asterisk is next to the dropdown arrow. Below it is a note: "Note: Applies new defaults to Is Scorecard, Statement List, and Min/Max options".
- Is Scorecard?:** A checkbox that is checked.
- Statement List:** A list box containing the following items: Partnership, Phone call, Read and Understood, Response provided, Response provided - ( Response Required ), Section Skipped, Social media, Sole Trader, and Text. The "Sole Trader" item is highlighted in blue. A red asterisk is next to the bottom arrow of the list box.

Figure 7 360Pro™ User's perspective - select 'None (no response comments)' to hide comments/text box and only allow the Provider to respond via a pre-defined statement

Responses without Comments works for Scorecard and Normal questions.

All Provider responses will be "(no comments permitted)", and Providers won't see their response comment.

You can allow attachments with the 'Response without Comments' function (they have to be Normal questions only). If the provider has to attach a document to their response, make sure the appropriate statement is a ' – (Response Required)' statement. This will prompt the Provider to add their attachment prior to moving to the next question and the question will remain incomplete until an attachment is added.

## Support

For more information on structured date fields, please email [support@simplylogical.net](mailto:support@simplylogical.net).

For more information on importing, please refer to the import [Data Format](#) and [Tutorial](#) instructions in your Apet 360Pro™ account.