360Pro™
'source selection in a box, see it to believe it'

Apet®360Pro™ Procurement Portal
User Guide 31

Apet® Software

Local Preference Functionality

Background

360Pro can incorporate a client's (e.g. a Council's) local preference policy through the procurement cycle:
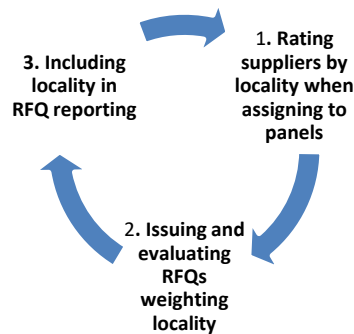
Rating Providers by locality

Providers can be assigned their 'location' and a subsequent local preference rating (based on council-specific criteria regarding geographical distance).

Boss users can add a library of locations via the Location tab in Systems settings (similar to how Statements are added to the statement library – see Figure 1).

1. Locations entered in this library will appear as multi-select checkboxes alongside Provider details and also within Jobs where location is associated.

2. If there are locations that can be assigned to a Provider but a job will never be in that area (for example, a Location labeled "Other"); Bosses can specify an 'out-of-area' location. This means the Provider can still be assigned that location, but the option to set that Location as the Job Location will not be available to Job Managers.

3. Bosses can attach a document (e.g. a Map, to the Location tab in System) and every time a job is created with "Is Location Associated?" set to Yes, the document will be available for Job Mangers to view when they are completing the Location details for a Job.
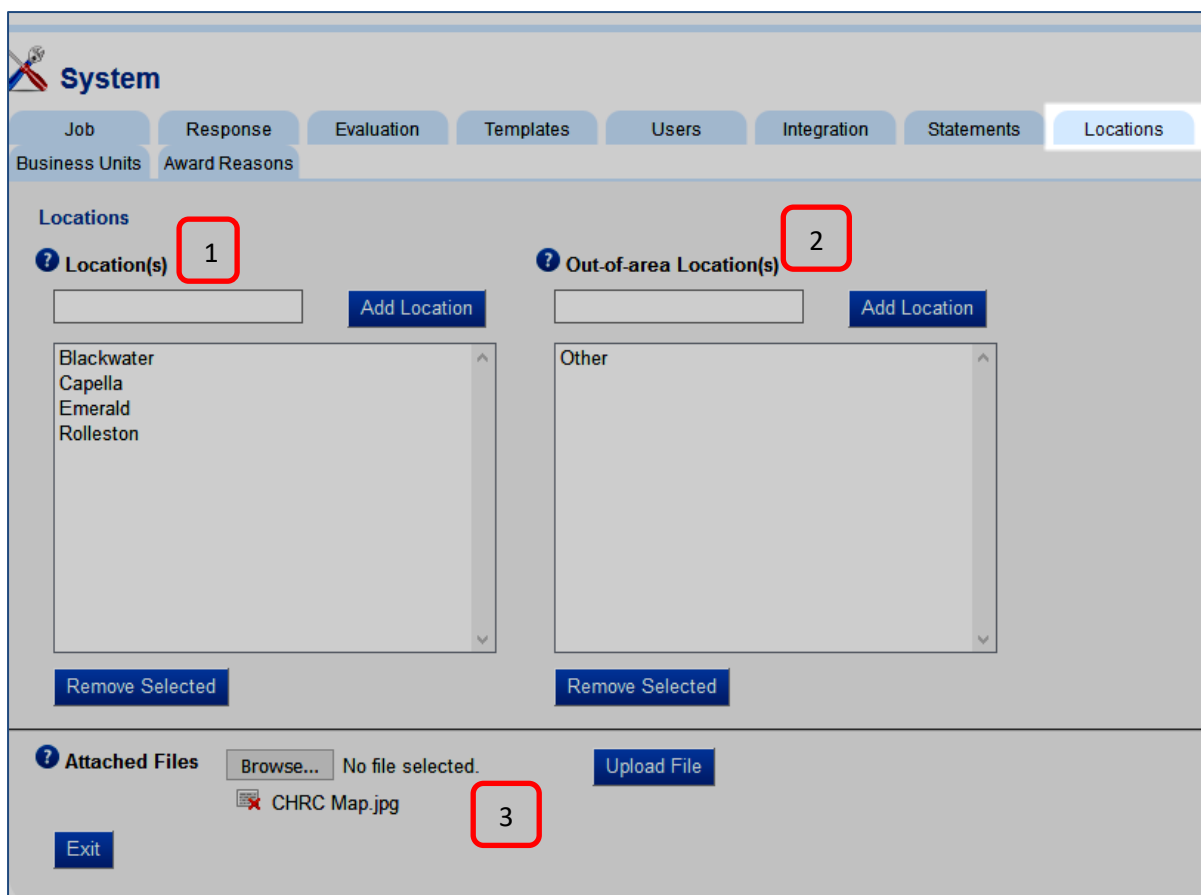
Figure 1 Location Library

To rate a provider according to their location/local preference policy:

1. Click on Providers.

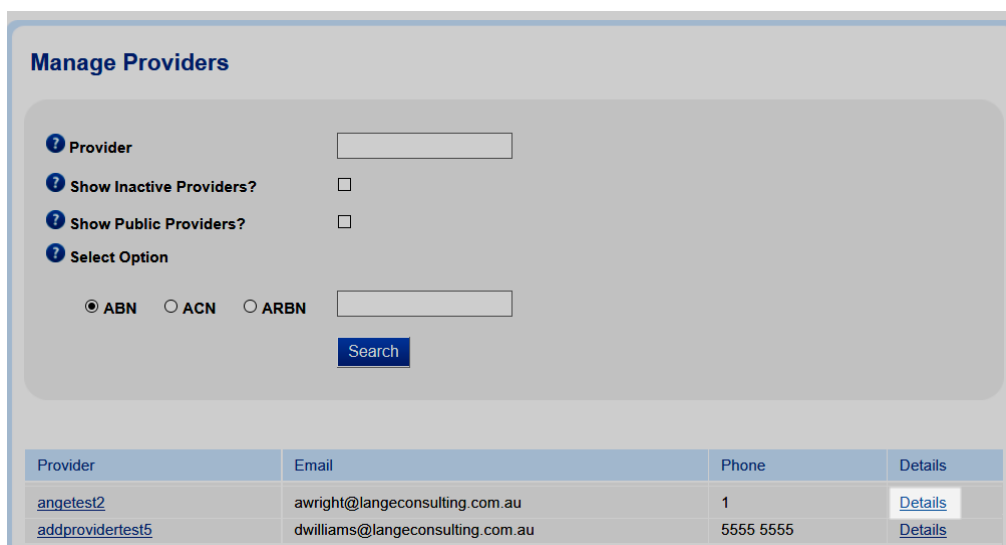2. Click on Details in the Manage Providers view for the Provider.

Figure 2 'Details' link on Manage Providers View

3. Select the location(s) and nominate an integer rating (0-5; based off the User's local preference policy).
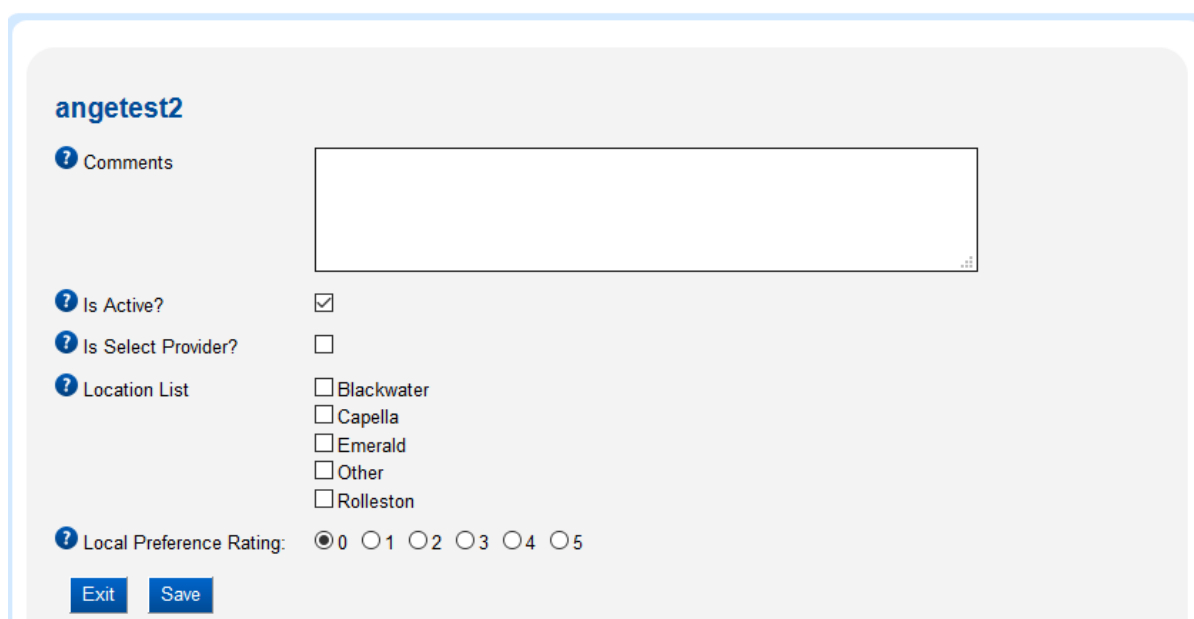
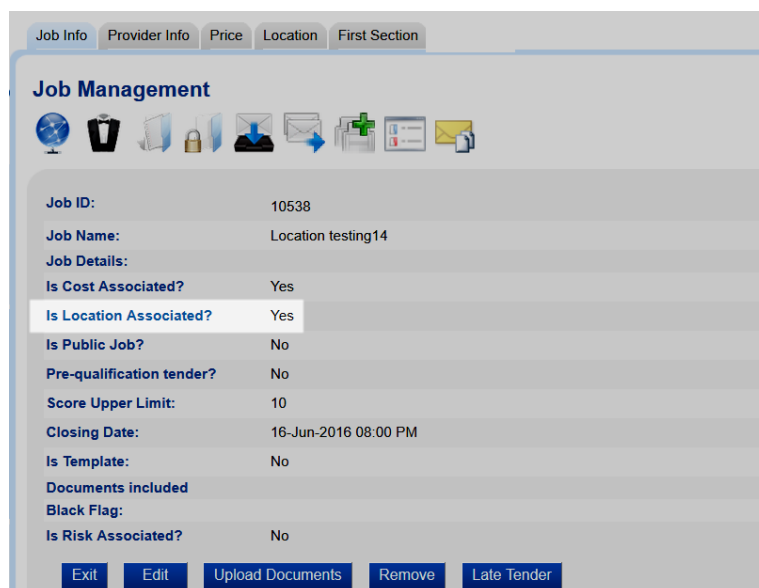Figure 3 Assigning a Location(s) and Local Preference Rating to a Provider

4. Click Save.

5. Repeat for all providers (as necessary).

The Location(s) and the Local Preference Rating are **not** visible to Providers and therefore not available for Providers to edit.

Issuing a RFQ that incorporates local preference

360Pro™ can apply a location weighting to the Provider's location and local preference rating to rank Providers based on their locality (and other qualitative criteria) to determine the best value for money. This is similar to the way Price can now be weighted in 360Pro.

1. From the Job Info page, select 'Yes' for *Is Location Associated?*

2. A Location tab will be available alongside the other Job sections (as with Price).

Figure 4 Is Location Associated?

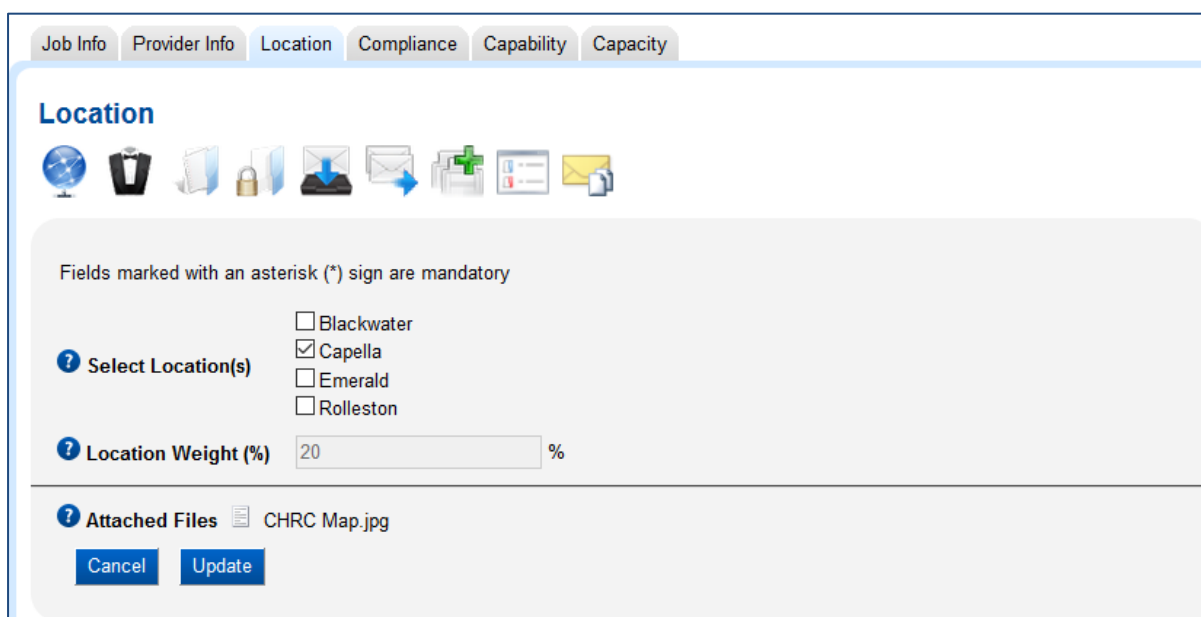3. In the Location tab, the User can select the Location(s) of the Job using the checkboxes and designate a Location weighting

- If the Boss has locked the Location Weight in a Template Job, the Job Managers will not be able to edit the Location Weight when they create a Job from that particular Template job (the Boss can edit the Location Weighting at any time).

- If the Boss user has attached a Location document in System settings, this document will be available for Job Managers to view when they are completing the details on the Location tab

Figure 5 Location tab with Locations and Location Weight

4. Unlike Price, Providers do <u>not</u> see the Location tab when responding to the Job.

Evaluating a RFQ that incorporates local preference

The Location weighting is automatically calculated in the Job, i.e. evaluators do not see/'score' the Location tab during their evaluation.

IF Location Weight is greater than 0 (e.g. 20%), THEN the Location is a part of the evaluation in reports. (Similar to the way in which weighting Price occurs)

The score for the weight is as follows:

a. IF a location in a Provider's account = the location on the Location tab, THEN the Location Score is the maximum for local content (100%).
E.g. If the location on the location tab has been specified as 'Sydney' and the provider has 'Sydney' selected as their location, they get 100% as their location score and therefore 100% of the location weighting assigned to the Job (e.g. 20%).

b. IF a location in a Provider's account does not equal the location on the Location Tab, THEN the Location Score is the score for local preference rating in the Provider's Account 0-5 (0-50% of the maximum available score).
E.g. If the location on the location tab has been specified as 'Sydney' and the provider has 'Melbourne' selected as their location and they have a rating of 3, they get 30% as their location score (and subsequently they'll get 30% of what has been specified as the location weighting (30% of 20% equals 6%).

Within the Evaluation plus Risk report, the Location Score and the Location Weight is then included in the 'Score' formula to determine the overall Value for Money and rank of Providers.

Support
For more information, please email support@simplylogical.net.