

Apet®360Pro™ Procurement Portal User Guide 35



Setting Pre-submission Rules

Overview

This User Guide describes the steps to create pre-submission rules for 360Pro Adcom-enabled accounts.

Background

There are cases where attendance by Providers to an industry briefing or site visit, for example, is mandatory. Where a Provider registers for a Job but does not attend an industry briefing or another type of pre-submission 'rule' is not met, that Provider is considered non-compliant and can no longer participate in the Job/tender process. If the pre-submission 'rule' is enabled, 360Pro Job Managers can exclude Provider(s) from receiving any future addenda and submitting their response.

Setting up Pre-submission rule functionality

Boss to configure System settings

- On the Job settings tab, select "Pre-submission rules" checkbox
- Three text boxes will open (Rule, Passed, and Failed). The text within these text boxes will be displayed at the top of the Provider view in red (i.e. replace the default text '*Your response is not yet complete. To show progress, please mouse over the traffic light or click on the "Review" button to reveal questions you have yet to respond to. Complete all questions to expose the "Submit" button.*') The text entered in System will be the default text that can be customized by the Job Manager when a Job is created.

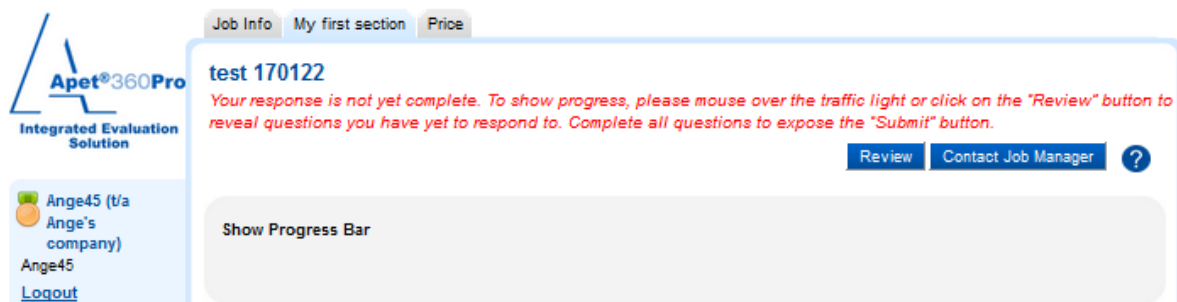


Figure 1 Red 'default' message will be replaced by 'rule' and then 'passed' or 'failed' message

Example 'rule' text displayed when Job is first published:

It is considered a mandatory requirement for submission for all tenderers to attend the Industry Briefing. Tenderers will not be able to submit their response if they fail to attend this Briefing.

Non-compliant/Failed Providers, example message:

Your organisation did not attend the Industry Briefing and therefore you are ineligible to Submit a response for this Job.

Compliant/Passed Providers, example message:

Your organisation did attend the Industry Briefing and therefore you are eligible to submit a response for this Job. To show progress, please mouse over the traffic light or click on the “Review” button to reveal questions you have yet to respond to. Complete all questions to expose the “Submit” button.

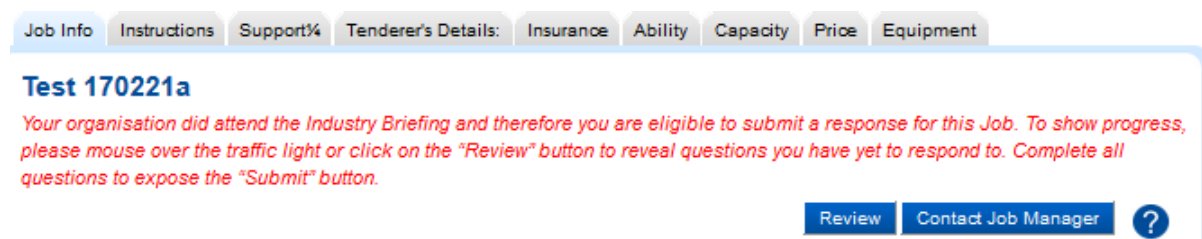


Figure 2 Provider perspective; passed message

The text within the following email templates can be customized via Templates in System.

- **Passed Pre-Submission Email:**

Dear #PROVIDERNAME#,

Thanks for attending the mandatory industry briefing, we're looking forward to receiving your submission.

Kind Regards,
Apet360 Management Team

- **Failed Pre-Submission Email:**

Dear #PROVIDERNAME#,

Your organisation did not attend the mandatory Industry Briefing and therefore you are ineligible to Submit a response for this Job.

Kind Regards,
Apet360 Management Team

Job Creation stage:

Via the Job Info user interface, the Job Manager can select the Yes or No radio button alongside "Pre-submission Rules Apply". If set to Yes, three text boxes (Rule, Passed, and Failed) will open displaying the default text entered by the Boss in System settings (discussed above). This default text can be edited by the Job Manager. As mentioned above, this text will be displayed in red at the top of the Provider's view.

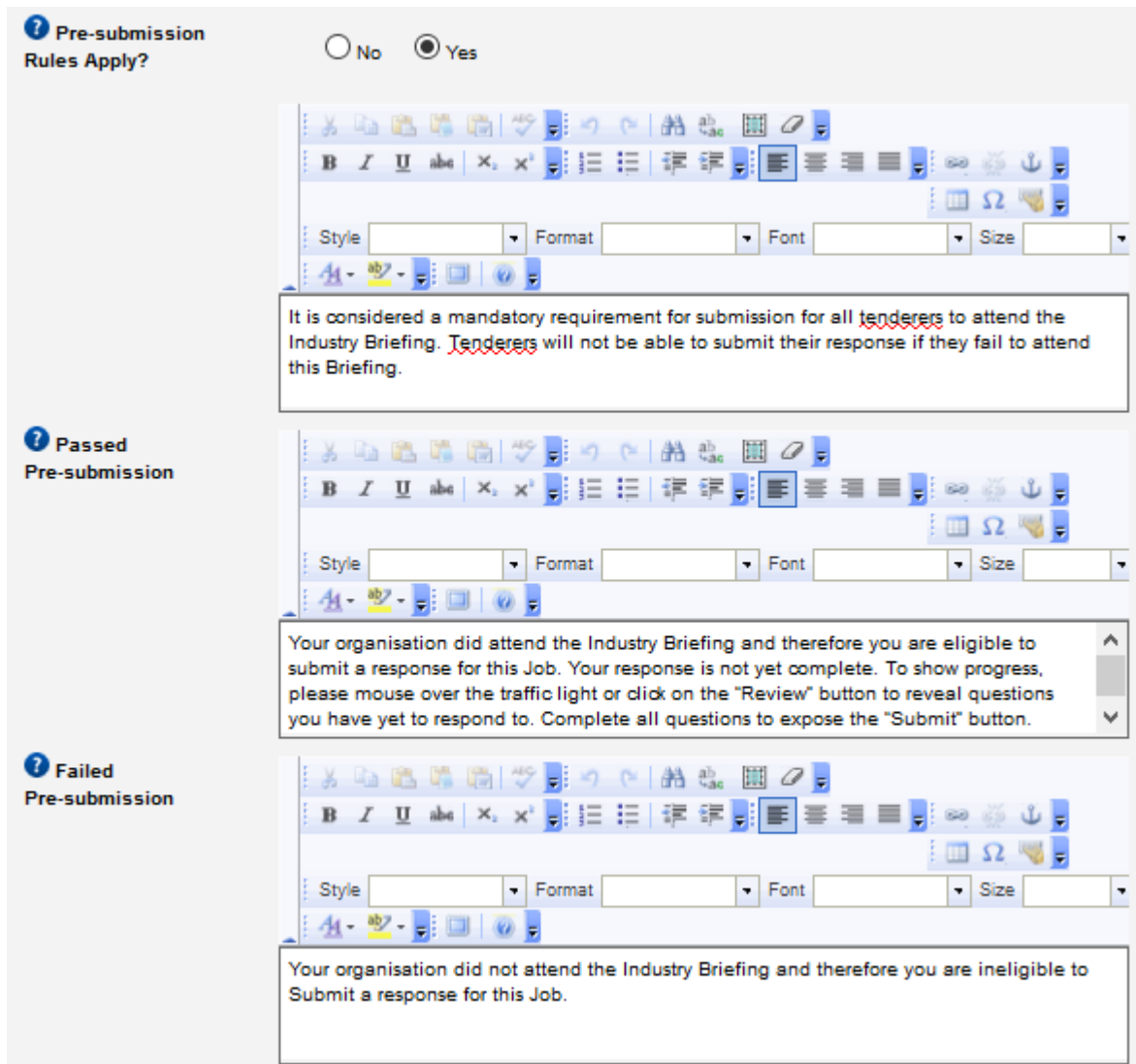


Figure 3 Job Manager's perspective: Pre-Submission Rules, Passed Message & Failed Message

Pass/Fail a Provider:

Via the Globe icon within the Job, click on the "More Info" link on the right hand side of the Provider name. At the bottom of the Job Provider Info's view there will be an option to select "Yes- Passed" and "No- Failed" beside "Has Passed Pre-submission Rules?"

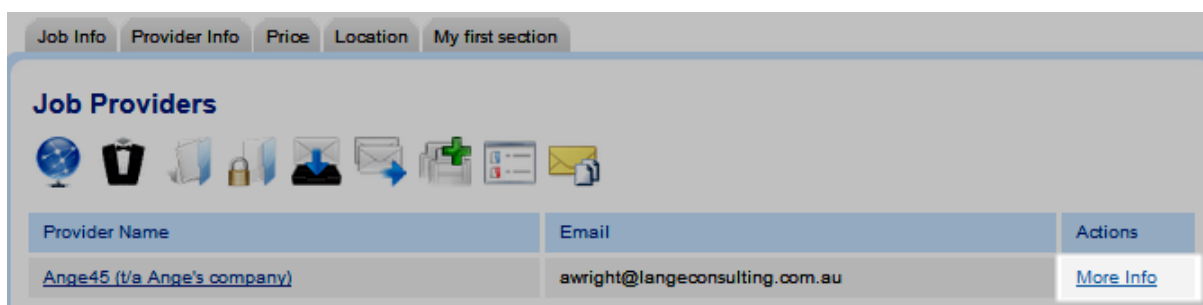


Figure 4 Job Providers view (via Globe icon)

Has Passed Pre-submission Rules? Yes - Passed No - Failed N/A - Not Assessed

Exit Update Check Number ABR Lookup

Figure 5 Job Manager can Pass or Fail a Provider

If **N/A – Not Assessed** is checked:

- Selected by default as soon as a Provider registers for the Job
- Red status message across the top of Provider view will display the “Rule” message (example text shown above)
- Provider can start their response but the Submit button will not be exposed until ‘**Yes- Passed**’ has been selected (and they have completed their response/opened all addenda)
- Provider will receive addenda

If **Yes – Passed** is checked:

- Triggers ‘Passed Pre-Submission Email’
- Red status message across the top of Provider view changes to the “Passed” Provider message (example text shown above)
- Provider will be able to submit when their response is complete and all addenda (if applicable) have been opened.
- Provider Listing (two-person icon) report from Job Management page flags Passed Providers and the date the ‘Yes’ checkbox was selected

If **No - Failed** is checked:

- Triggers ‘Failed Pre-Submission Email’
- The Provider does not receive any more addenda (“pseudo” deregisters them, but does not delete their response)
- Red status message across the top of Provider view changes to the “Failed” Provider message (example text shown above)
- Provider is unable to continue or submit their response (red traffic light, no Submit button, red status text along the top of the Provider view explains their ineligibility to submit and remains there regardless if they edit/enter responses to questions)

Reversing a Pass/Fail decision:

The Boss is able to reverse the decision via the Override link from the Job Provider Info’s view. Overriding a decision will require an audit reason (and be included in the audit report). If the decision is to ‘Pass’ a Provider, they will receive all previously issued addenda and an email advising them their passed the pre-submission rules.

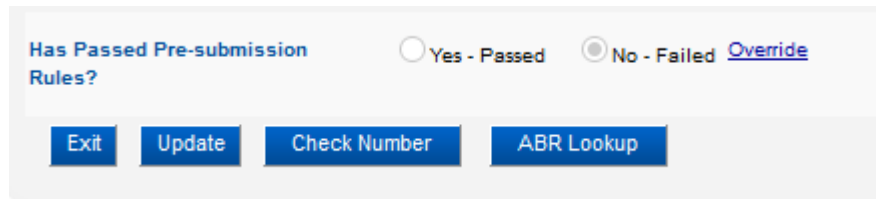


Figure 6 Boss can override Pre-submission rule decision

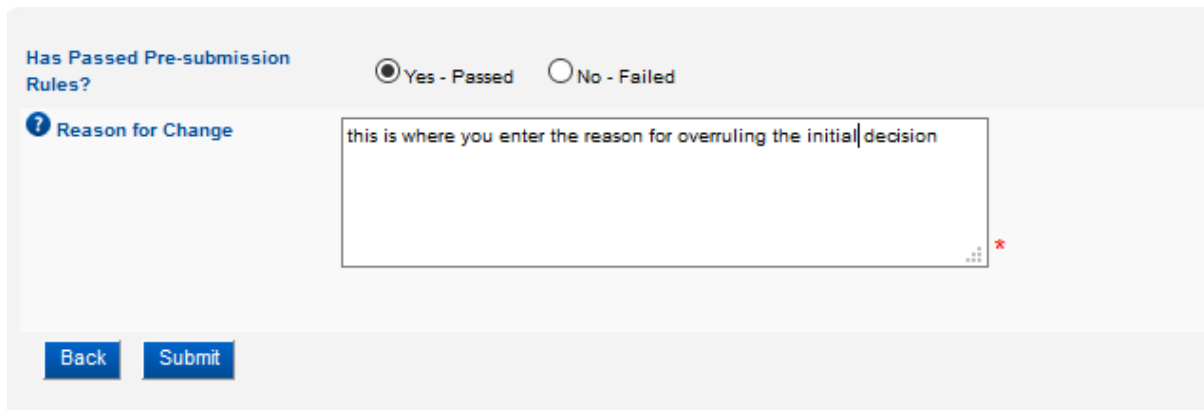


Figure 7 Boss to enter Audit reason for overriding initial decision

The override functionality is available during a Late Tender Window; i.e. a previously failed Provider can be changed to a passed Provider and be able to submit their completed response during a Late Tender Window.