

Apet[®]360Pro[™] Procurement Portal User Guide 36



Alternative Submissions/Tenders

Overview

This User Guide describes the steps to allow Providers to submit an alternative response/s to a Job. **Background**

Users of **360Pro Adcom** can allow Providers to submit alternative submissions to a Job where they intend to submit a compliant response. Alternative Submissions are created by cloning the compliant response. This functionality is switched <u>off</u> in System by default.

Please note: You cannot allow Alternative Submissions for Parent-Child Jobs.

This setting needs to be switched on via the Response tab in System and it can be switched on or off on a Job-by-Job basis depending on the conditions.

🔏 System	ı						
Job	Response	Evaluation	Templates	Users	Integration	Statements	Locations
Business Units	Award Reasons						
Response Se	ettings						
O Store prov	ider contact inform	ation 🗹					
Allow Late	Tender						
🕜 Late subm	nission period (in m	ninutes) 0		*			
Can conta	ct manager?						
Allow Alte	rnate Submissions	? 🗹					
Cancel	Update						

Figure 1 'Allow Alternative Submissions?' in Response Settings

Alternative Submission Type

When Allow Alternative Submissions is set to 'Yes' at the Job level, there are two Alternative Submission options to choose from:



1. Integrated

If switched on, Providers will be able to create an Alternative Submission via the *Create Alternative Submission* button on their Job Info tab at any time and they will have the ability to edit ALL responses within their Alternative Submission.

The Alternative Submission is included in the evaluation of qualitative criteria as a 'regular' Provider would be (i.e. a score assigned to each of the weighted questions).

2. Departure

If switched on, Providers will be able to create an Alternative Submission via the *Create Alternative Submission* button when their traffic light is <u>amber</u> (i.e. ready to submit - all questions complete, all addenda have to be opened, if pre-submission rules apply; the Provider has to have passed, and if a Document fee applies, it has to have been paid).

Job Managers will be able to specify which sections within an Alternative Submission <u>can and</u> <u>cannot be edited</u> by the Provider, i.e. what was entered into the Complaint submission will be cloned into the Alternative Submission and can or cannot be edited depending on the configuration of the Job by the Job Manager (see details below).

A 'Departure' tab (and corresponding hard-coded question) will be mandatory to complete in the Alternative Submission (see details below).

When it comes time to evaluate, Evaluators will be able to see all responses within an Alternative Submission, but will not be able to score them. Alternative Submissions will be given one score (see details below) and this score will be used as their total "non-price result" for VFM calculations.

In both instances, Alternative Submissions will be listed as separate submissions for reporting purposes.

Alternative Submissions Limit

As a Job Manager you can specify the number of Alternative Submissions the Provider is allowed to Submit. If this field is left blank or a 0 is inserted, the Provider will be able to submit an unlimited number of Alternative Submissions.

Providers will be able to create as many Alternative Submissions as they like but on the View Alternative Submission page the number of submissions allowed will be displayed in red text and if a Provider attempts to submit more than is allowed, an error message will be displayed.



Figure 3 Provider perspective - Limiting the number of Alternative Submissions



Alternative Submission – Departure:

Editable & Non-Editable Responses

By selecting the 'Departure' option as the Alternative Submission type, Job Managers can specify which sections within their Job will be read-only in the Alternative Submission; i.e. Job Managers have the ability to specify which responses entered into the compliant submission can/cannot be edited by the Provider in the Alternative Submission. By default, ALL sections will be read-only and the Job Manager can specify which sections are editable via the user interface (the Manage Sections view) before the Job is published.

Manage Sections	
🧕 🛈 🎣 🎒 🚨 척	ria 📰 🌄
Fields marked with an asterisk (*) sign are	mandatory
Section Name	My first section *
Relative Weight	1 *
Private Section?	
Is Optional Section?	Skipped By Default
O Allow Changes to Alternate Submissions?	□ (when not private)
Attached Files	Browse No file selected.
Cancel Update	

Figure 4 Job Managers are able to select whether the questions within a section in the Alternative Submission is editable or not

Departure Question

If 'Departure' is specified, a Departures tab with one question (*When tendering an Alternative Submission, please identify each departure from the Job's requirements, describing how and why it departs from those requirements, and the benefits of the Alternative Submission. If any Alternative Submission is evaluated, details provided here will be used for that evaluation.*) will automatically populate when an Alternative Submission is created. This tab/question is hardcoded within 360Pro and cannot be edited. It is mandatory for the Provider to insert a text response or attach a file (or both) to this question. The maximum score for the Departure question is the score upper limit set for the job.

Provider's Perspective:

By turning on 'Allow Alternative Submissions', Providers will be able to click on '*Create Alternative Submission*' from their Job Info page.

Date Released: 13-Jul-2016 12:00 PM Date Closing: 13-Jul-2017 08:00 PM Supporting Documents: • Test text160122.docx (12.2 KB) Start Response Create Alternate Submission		
Date Closing: 13-Jul-2017 08:00 PM Supporting Documents: • Test text160122.docx (12.2 KB) Start Response Create Alternate Submission	Date Released:	13-Jul-2016 12:00 PM
Supporting Documents: • Test text160122.docx (12.2 KB) Start Response Create Alternate Submission	Date Closing:	13-Jul-2017 08:00 PM
Start Response Create Alternate Submission	Supporting Documents:	 <u>Test text160122.docx (12.2 KB)</u>
	Start Respo	onse Create Alternate Submission

Figure 5 Provider's perspective: 'Create Alternative Submission' from Job Info tab

If Departure Alternative Submission has been set, the *Create Alternative Submission* button will <u>not</u> be available to press (i.e. it will be grey) until the traffic light is <u>amber</u> (i.e. ready to submit - all questions complete, all addenda have to be opened, if pre-submission rules apply; the Provider has to have passed, and if a Document fee applies, it has to have been paid).

When Providers click on *Create Alternative Submission*, all of the responses in the compliant submission (including attachments) with the exception of price (entered in the Price tab if applicable) will be cloned. After *Create Alternative Submission* has been clicked, changes made to the complaint submission <u>do not</u> appear in an alternative submission and vice-versa.

Depending on whether Integrated or Departure has been selected, Providers will be able to edit their responses for their alternative submission (Integrated) or responses to some sections will be readonly and therefore cannot be edited (Departure). As mentioned above, if Departure was selected, and some sections of the Alternative Submission were set to editable, there will be a star alongside the tab (section) heading; this star means responses to questions within this section can be edited.

Additionally, if Departure was set, a Departures tab with one question (*Please identify all departures from the tender specification, briefly describe anticipated benefits as a result of the departures including addressing any risks to delivery of (alternative) goods and services against any target delivery dates to achieve tender outcomes*) will automatically populate in the Alternative Submission.

Job Info Instructions	Support%	Tenderer's Details:	Insurance	Ability*	Capacity*	Price*	Departure*
AT Test 170220							

Figure 6 Provider Perspective- Editable sections have a * next to their section name/tab heading

Departure						
When tendering an Alternative Submission, please identify each departure from the Job's requirements, describing how and why it departs from those requirements, and the benefits of the Alternative Submission. If any Alternative Submission is evaluated, details provided here will be used for that evaluation.						
O Departure Details						
Upload document(s)	Browse No file selected. Upload File					
Exit Save						

Figure 7 Provider Perspective - Departure Question

Providers can switch between their compliant response and their alternative response via the 'Switch to Compliant Submission' link if they're working on their alternative response or via the View Alternative Submissions button on the Job Info tab if they're working on their complaint response.

Providers can rename their alternative submission; this is for their convenience only and is visible in the bottom left hand corner of their screen when they're working on their alternative submission. This name is not displayed to evaluators.

Alternate Submis	sion Name:	Alternate Submission 3
Submit Ca	ancel	
	Figure 9 Re-na	ming alternate submission
Alternate Submission 3 Switch to Compliant	Upload document(s) Browse Exit Next Save Remove	No file selected. Upload File
SUDMISSION		



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If addenda have been released, they need to be opened and read <u>on the compliant submission</u> before Providers can submit. If addenda are released after responses have been submitted and a Provider decides to re-open their Alternative Submission, the addenda on the compliant submission must be opened so the Provider can submit the Alternative Submission.

There is no ability to de-register/delete an Alternative Submission. If a Provider decides not to submit their alternative response, they don't press the Submit button. As with the compliant submission, Providers do have the option to re-open their Alternative Submission before the Job closes.

Please note the following important business rules:

- The compliant submission must be submitted **before** alternative submission(s) are submitted and each response is submitted **separately**.
- If the Compliant Submission is re-opened it will <u>automatically re-open</u> any submitted Alternative Submissions and therefore the Provider MUST submit their Complaint Submission AND then their Alternative Submission(s) again. In this situation, Providers will only receive a re-open response email for the compliant submission (and not the Alternative Submissions)
- Providers will receive a re-open response email if they (intentionally) re-open their Alternative Submission(s).

Providers are able to export their Alterative Submissions into a zip file via the Export link on the View Alternative Submissions page.

Emails received by Provider

360Pro emails will be distributed as they normally are to Providers, but for Providers who do create and/or submit an Alternative Submission they will be sent an *Acknowledgement email to Provider* if they contact the Job Manager via the Contact Job Manager button on their Alternative Submission, a *Submission confirmation email to Provider* when they submit their Alternative Submission, a *Re-open submission email to provider* if they (intentionally*) re-open their Alternative Submission, and (if applicable) a *Job awarded - email to chosen Provider*.

***Please Note**: If a Provider re-opens their confirming submission, their submitted Alternative Submission(s) will automatically re-open and they will only receive one re-open response email (not one email for their conforming and another email for their Alternative Submission(s))

Response Confirmed for AT Test 170222a To (angetest3) Dear angetest3¹/₄ (alt 7), Thank you for your responses for job 'AT Test 170222a'. Kind Regards, Apet360 Management Team

Figure 10 Example of a Response Confirmed email received by a Provider when they submit their Alternative Submission

Job Manager's perspective

For all alternative submissions, the Provider name will end with "(Alt #.#); the first number will be the job ID and the second number will be the alternative submission count that provider (and this number will reset for every job) - e.g. "AngeWright (Alt 10806.1)" submits their first alternative tender.

e.g. Compliant Submission = "AngeWright"

Alternative 1 = "AngeWright (Alt 10806.1)"

Alternative 2 = "AngeWright (Alt 10806.2)" etc

Late Tender, Black Flag, Document Upload

When a Job closes, if you would like to open a Late Tender Window to allow a Provider to submit their Alternative Submission(s) you need to select **<u>both</u>** the 'original' Provider and the 'alternative' Provider on the Late Tender Window view (even if the confirming submission had been submitted before closing time).

Job Info Provider I	nfo Price Location My first section
Late Tender	
The actual job clos	ing date is '15/Jan/2017 10:30 AM'
2 Late Minutes	5
Audit Reason	There was a power failure
Open To	
	Ange45 (t/a Ange's company)
	Ange45 (t/a Ange's company) (alt 8)
	☑ angetest2
	☑ angetest2 (alt 4)
	angetest3%
Exit Upda	ate

Figure 11 Opening a LTW for a Provider who wants to submit an Alternative Submission

If a Provider has been granted access to a Late Tender Window they cannot create a new Alternative Submission during this time.

If during the course of the shortlisting phase, an Alternative Submission needs to be black-flagged or a document needs to be uploaded on the Provider's behalf for their Alternative Submission, you can do so via the Manage Black-flags and Upload Documents button from the Job Info page.

Job Info Pr	Job Info Provider Info Price Location My first section						
Black Flag							
Upload manual tender & evaluations and/or provide reason for Black flagging.							
Provider	Responded	Black Flag Reason (if applicable)	Upload Documents				
Ange45 (t/a Ange's company)	15-Jan-2017 10:24 AM	OBlack-Flagged Include in Evaluation	Browse No file selected. Document(s) Uploaded: 0				
Ange45 (t/a Ange's company) (alt 8)	15-Jan-2017 10:24 AM	Black-Flagged O Include in Evaluation Black Flag Reason. Please Note: inserting text into this box will mark this Provider as non-compliant and exclude them from the evaluation	Browse No file selected Document(s) Uploaded: 0				
angetest2	15-Jan-2017 10:26 AM	OBlack-Flagged Include in Evaluation	Browse No file selected. Document(s) Uploaded: 0				
angetest2 (alt 4)	15-Jan-2017 10:26 AM	OBlack-Flagged Include in Evaluation	Browse No file selected. Document(s) Uploaded: 0				
angetest314	15-Jan-2017 10:27 AM	OBlack-Flagged Include in Evaluation	Browse No file selected. Document(s) Uploaded: 0				
Exit	Jpdate						

Figure 12 Black-Flagging or Adding a Document for a Provider who submitted an alternative submission

Evaluation

Depending on whether Integrated or Departure has been selected as the Alternative Submission Type, the evaluation is conducted either the same way as it normally would be (Integrated) or, for Departure Alternative Submission type, Evaluators will evaluate compliant submissions as they normally would but Alternative Submissions will only have a score assigned to the Departure question (details below).

Integrated:

Alternative Submissions are listed as separate Providers and scored the same way 'regular' Providers are evaluated.



Evaluate: TEST JOB 170115 location

Ø P	roviders	Ange45 (t/a An Ange45 (t/a An angetest2 angetest2 (alt 4 angetest3%	ge's compa ge's compa)	iny) iny) (alt 8)	~		
🕐 s	ection	My first section	1		\sim		
8 q	uestion	This is a questi	on requiring	an attachment only and is weighted	~ (0	
		Back Sho	Sav	ve			
Switch	Provider	Response	Score	Comment		Tags	\$
	Ange45 (t/a An company)	ge's <u>Do Not</u> <u>Comply</u>	↓				J
	Ange45 (t/a An company) (alt 8	ge's <u>Do Not</u> 3) <u>Comply</u>	↓				J
	angetest2	<u>Do Not</u> <u>Comply</u>	↓			*	J
	angetest2 (alt 4) Do Not Comply	×				J



Departure:

Alternative Submissions are listed as separate Providers, but they are only given a score in the Departure section (i.e. The Alternative Submissions are not scored against any of the weighted questions – there is no score drop down box and it will be reported as 'n/a' in all applicable reports). Evaluation Guidance (chalkboard) will still populate text in the comments box if selected for an Alternative Submission and the Info tags and Switch functionality work as they do for 'regular' Providers.



Section	Departure		~
	Back Show	Save	
Provider	Departure Details	Score	Comment
Ange45 (t/a Ange's company)	n/a	n/a	n/a
Ange45 (t/a Ange's company) (alt 26)	View Departure Details	9 🗸	
Ange45 (t/a Ange's company) (alt 27)	View Departure Details	8 🗸	
angetest2	n/a	n/a	n/a

Figure 14 Evaluator view of Departure question

While evaluating the Departure section, Evaluators do not have access to the 'Switch' or 'Info Tag' options.

Switch	Provider	Response	Score	Comment	Та			
સ્પર સ્પર્ટ	Ange45 (t/a Ange's company)	Response provided • 10713 Test text160122.docx (12.7 KB)	8 ~	8 Very good offer - Meets requirements to a very high standard. Risk involved is easily managed. Low risk .:i				
	Ange45 (t/a Ange's company) (alt 22)	Response provided • 10713 Test text160122.docx (12.7 KB)		6 Fair - Requirements addressed well in all areas. Medium risk				
Figure 3	Figure 15 "Departure" Evaluation view includes alternative submissions response (but Evaluators are not able to score							
				them)				

Reporting

From a reporting perspective, Alternative Submissions are listed as separate submissions.

Provider Information				
Provider Information	Company Name	ABN	Address	Contact P
Ange45 (t/a Ange's company) (awrig	Ange45 (t/a Ange's con	npany)		4.13E+08
Ange45 (t/a Ange's company) (alt 1)	Ange45 (t/a Ange's con	npany) (alt	1)	4.13E+08
angetest2 (awright@langeconsultin	angetest2		10 Smith S	4.13E+08
angetest3¼ (awright@langeconsult	angetest3¼			4.13E+08
Scoring				
System	VFM			
Price Weight				
Location Weight				
Lowest NPV	\$15,000.00			
Highest NPV	\$15,000.00			
Median NPV	\$15,000.00			

Figure 16 Evaluation plus Risk report includes alternative submissions

Results													
Providers	Is Departure?	Non Price		Risk		Price			Location		VFM Calculation		
		Result	Ranking	Index	Ranking	NPV	Result	Ranking	Result	Ranking	Result	Ranking	
Ange45 (t/a Ange's company)	No	74%	1	1	1	\$20,000.00		1	40%	1	103.4	1	
Ange45 (t/a Ange's company) (alt 23)	Yes	60%	2	1	1	\$30,000.00		2	40%	1	57.0	2	
Ange45 (t/a Ange's company) (alt 22)	Yes	44%	3	1	1	\$260,000.00		3	40%	1	5.0	3	

Figure 17 Evaluation plus Risk report states whether Job was evaluated via Departure option.

If the Job has been specified as a Departure Alternative Submission type, the Non-Price Result for Alternative Submissions is the score they were given to the Departure question (out of 100%) and the Departure score and Evaluator comments are only captured in the Evaluation plus Risk report.

PlantHire Synchronisation (only available to accounts who have a PlantHire account integrated with their 360Pro account)

When it comes time to synchronising equipment details with PlantHire, alternative submissions are treated as separate submissions.

Name	Equipment Class	Provider	Authorised
Angetest2 DT	C20 Dumpp truck	angetest2	
ANGE ALT 2	C2 Excavator	angetest2 (alt 1)	
Angetest4 exc	C2 Excavator	angetest4	

Figure 18 Synchronizing equipment details with PlantHire