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.
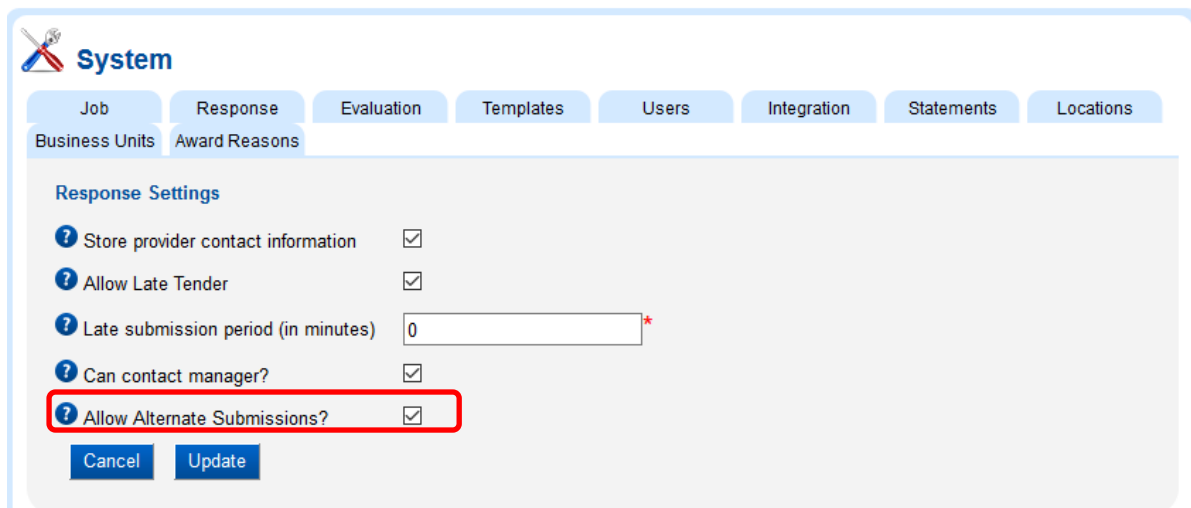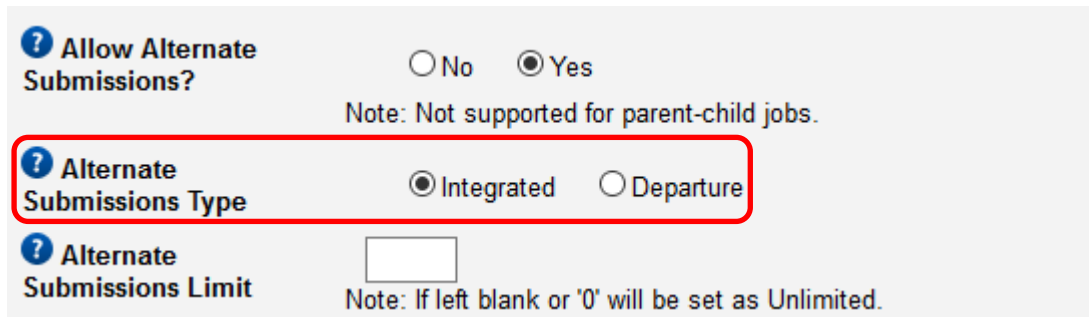

Figure 1 'Allow Alternative Submissions?' in Response Settings

Alternative Submission Type

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

Figure 2 Job Manager's perspective

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 **amber** (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 **can and cannot be edited** 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.
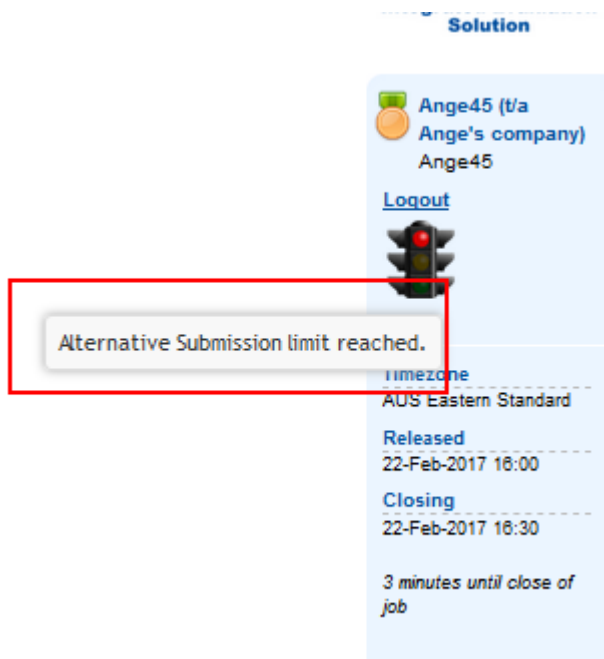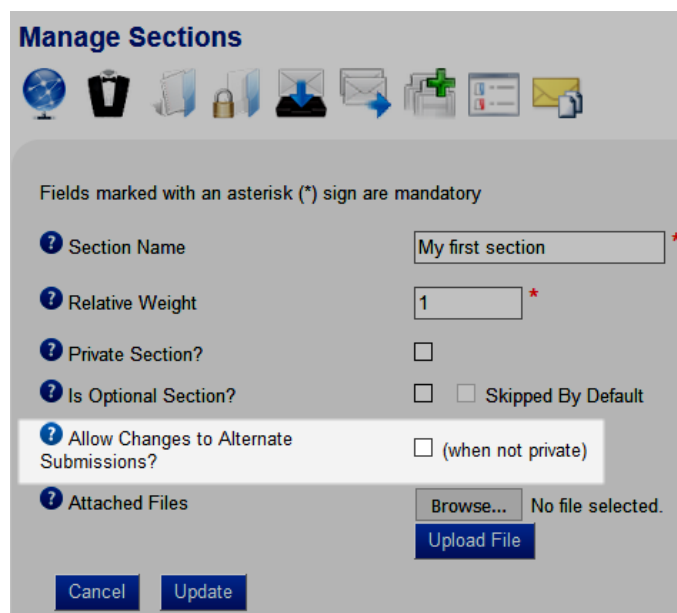

Figure 3 Provider perspective - Limiting the number of Alternative Submissions

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.

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.

360Pro is proudly supported by simplylogical.net as part of the vfmtest.com suite.

Provider's Perspective:

By turning on 'Allow Alternative Submissions', Providers will be able to click on 'Create Alternative Submission' from their Job Info page.
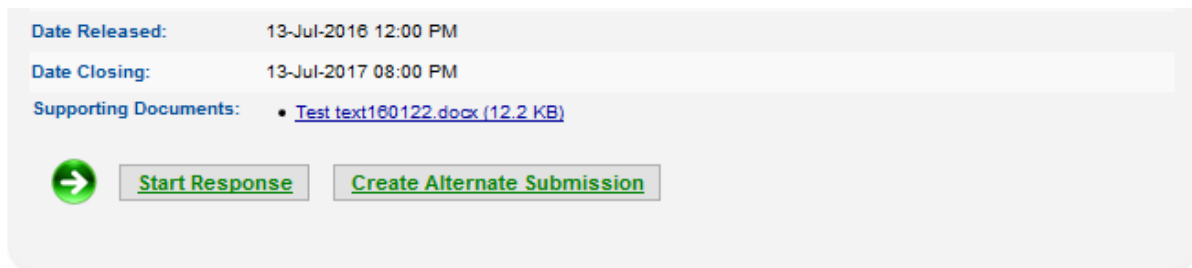
Figure 5 Provider's perspective: 'Create Alternative Submission' from Job Info tab

If Departure Alternative Submission has been set, the *Create Alternative Submission* button will **not** be available to press (i.e. it will be grey) until the traffic light is **amber** (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 read-only 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.
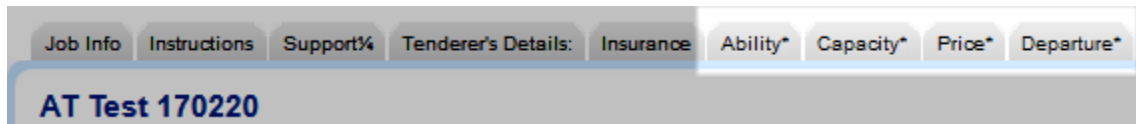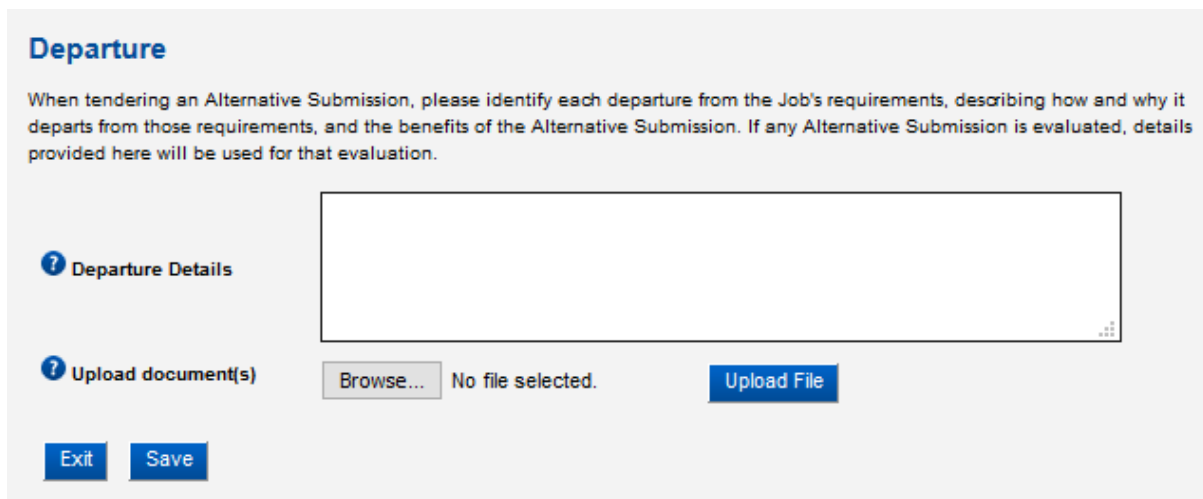
Figure 7 Provider Perspective - Departure Question

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.
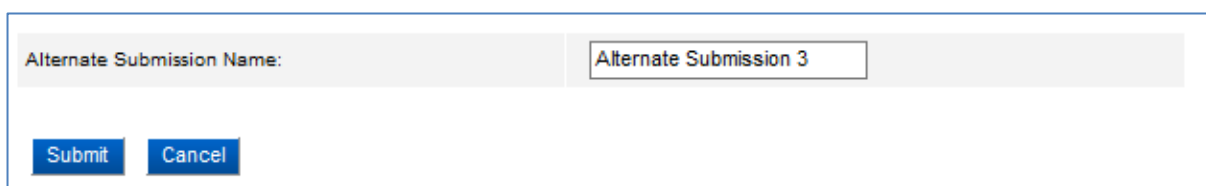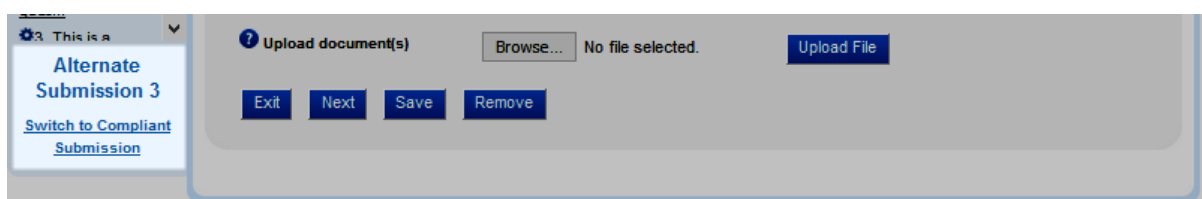

Figure 9 Re-naming alternate submission

Figure 8 Name of alternate submission

If addenda have been released, they need to be opened and read **on the compliant submission** 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 **automatically re-open** 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))
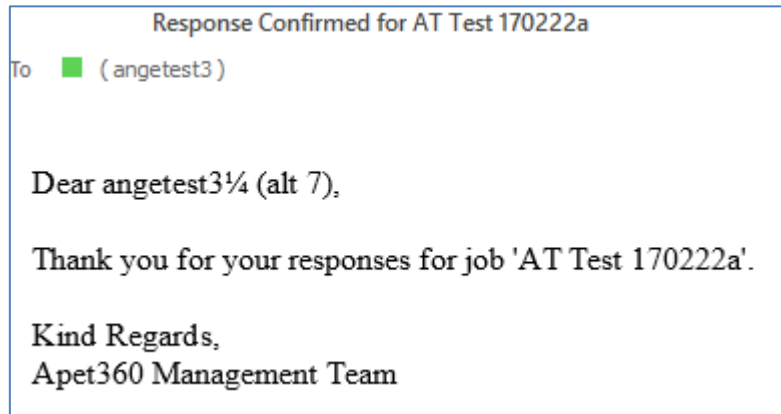
Response Confirmed for AT Test 170222a

To ☐ (angetest3)

Dear angetest3¼ (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 **both** the 'original' Provider and the 'alternative' Provider on the Late Tender Window view (even if the confirming submission had been submitted before closing time).

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.

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.

Figure 13 "Integrated" Evaluation view includes alternative submissions

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.

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

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 company)			4.13E+08
Ange45 (t/a Ange's company) (alt 1)	Ange45 (t/a Ange's company) (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