Apet®360Pro™ Procurement Portal
User Guide 39

Working Papers Removal
Overview

This functionality is designed to allow a 360Pro-Adcom User type ('Record Manager') to irrevocably remove evaluation working papers from 360Pro. Working papers are the scores, comments, and info tags entered individually by each evaluation panel member into 360Pro. Working papers cannot be removed by a single user. Upon removal of working papers:

- • Working paper details cannot be recovered,
- • The only data that can be reported from a job where working papers have been removed are overall VFM results; no evaluator comments or info tags will be reported,
- • It will be possible to run an administrative report of jobs where working papers have been removed; identifying the users who initiated the working paper removal process and the user who confirmed the working paper removal process – and corresponding dates for initiation and confirmation.

Business Rules

1.   Following Evaluation, standard Reporting and/or Awarding, a Job can have the evaluation Users, Scores, Comments, and Info Tags (what are described as working papers) removed (WPR) entirely and unrecoverable

2.   New 360Pro User role "Record Manager" – Two Record Managers (RM) are assigned to the Job

3.   Two-step confirmation process to remove WPs; one nominated RM User has to 'Initiate Working Paper Removal' with electronic signature then the second nominated RM User has to 'Confirm Working Paper Removal' with electronic signature (date and time stamp captured in Audit report)

4.   The RM User who initiates WPR cannot be the same User who confirms WPR

5.   Following initiation (but before scores/comments are deleted), a modified Evaluation plus Risk report is automatically generated showing Job and Provider details and overall VFM results only.

6.   Following approval, Results, Job Details, Info Tag, and Export to Excel – and any report that captures individual evaluator scores, comments, and info tags can be exported, but the content of these reports is removed.

Functionality

1. **Job Settings** – check the box to Allow Working Paper removal and click Update

2. **Users** – the nominated people who are going to initiate and approve WPR, have to have the User Role "Job Record Manager" checked for their User profile via Users

3. Return to the job, and assign the nominated Users as **Record Managers** via the Tuxedo icon (two different Users must be selected or the message below will be displayed).
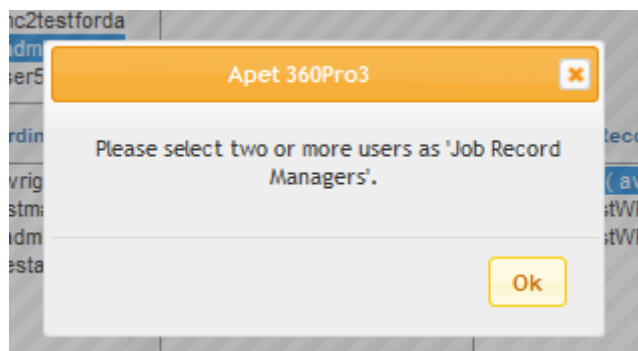
4. After the Record Managers have been selected and the evaluation is complete. WPR can be initiated

5. Either Record Manager User logs in.

6. Record Manager clicks on Jobs, click on the relevant Job and then at the bottom of the Job Info tab, click Start *Working Paper Removal* button. The Record Manager will be required to put in their 360Pro password to initiate this request.

7. An email will be automatically sent to the other User who is a assigned as the Record Manager letting them know
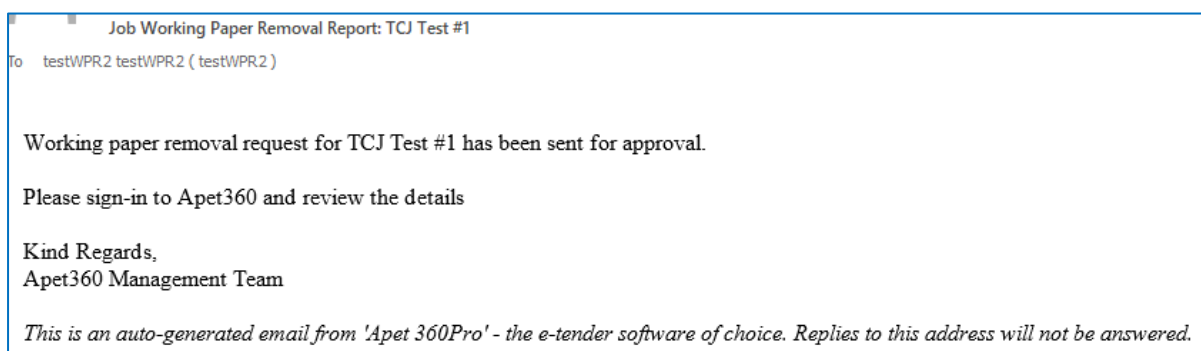
8. The screen will also display "*A request has been made to remove this job's working papers*" and the time/date and User who initiated the request is listed on the Job Info tab

9. The modified Evaluation plus Risk report can be downloaded at this time via the *Download Evaluation* button – the modified version of the Evaluation plus risk only contains Jobs Details, Provider Details, Pricing Details, Overall Results, Location details (if applicable), Risk Detail, and Section Results. (**Please note** – it is not until the WPR Request has been <u>approved</u> by the second Record Manager that the evaluation content is removed from all relevant reports in the Reports page. Before the Request is approved, reports will still include <u>all</u> evaluation details.
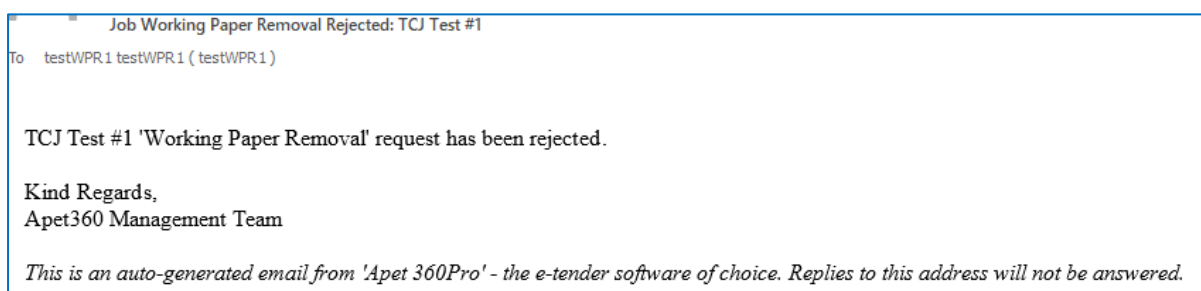
Job Management

A request has been made to remove this job's working papers.

Job ID:	21146
Job Name:	TCJ Test #1
Job Details:	Job set up to test new ABN look-up
Pre-submission Rules Apply:	No
Allow Alternative Submissions:	Yes
Alternative Submissions Type:	Departure
Alternative Submissions Limit:	2
Business Unit:	
Is Cost Associated?	No
Is Location Associated?	No
Is Public Job?	Yes
Promote By Region?	No
Promote By Industry?	No
Pre-qualification tender?	Yes
Score Upper Limit:	10
Closing Date:	12-Dec-2017 08:00 PM
Release Date:	11-Dec-2017 11:00 AM
Working Paper Removal Request:	16-Jan-2018 12:20 PM by testWPR1 testWPR1 (testWPR1)
Documents included	• RFT 10-2016 Contract.docx (11.4 KB) • RFT 10-2016 SPECIFIED PERSONNEL Form_Ange's company.docx (17.3 KB) • Addendum part 2.docx (9.6 KB) • Supporting Document Example.docx (11.1 KB)
Fee Required:	No
Black Flag:	
Is Risk Associated?	No

Exit   Download Evaluation

10. When the second Record Manager logs in, they will be able to Approve or Reject WPR via the respective buttons at the bottom of the Job Info tab. The Record Manager will be required to put in their 360Pro password.

Closing Date:	12-Dec-2017 08:00 PM
Release Date:	11-Dec-2017 11:00 AM
Job Awarding Approvers:	
Job Awarding Approval Date:	
Documents included	• RFT 10-2016 Contract.docx (11.4 KB) • RFT 10-2016 SPECIFIED PERSONNEL Form_Ange's company.docx (17.3 KB) • Addendum part 2.docx (9.6 KB) • Supporting Document Example.docx (11.1 KB)
Fee Required:	No
Black Flag:	
Is Risk Associated?	No

Exit   Download Evaluation   Approve - Working Paper Removal   Reject - Working Paper Removal

11. If the request is **rejected**, the WPR rejected email is sent to the Record Manager who initiated the Removal alerting them to the decision. The evaluation content (scores and comments), Evaluator's details, and info tags will remain in all relevant reports. The request can be initiated again by following the steps above.

Job Working Paper Removal Rejected: TCJ Test #1

To   testWPR1 testWPR1 (testWPR1)

TCJ Test #1 'Working Paper Removal' request has been rejected.

Kind Regards,
Apet360 Management Team

This is an auto-generated email from 'Apet 360Pro' - the e-tender software of choice. Replies to this address will not be answered.

12. If the request is **approved**, the evaluation content, Evaluator's details, info tags will be removed from all relevant reports and cannot be retrieved.

13. The *Download Evaluation* button on the Job Info tab is available to press any time by either the Records Managers or the Boss User. This Report captures the Jobs Details, Provider Details, Pricing Details, Overall Results, Location details (if applicable), Risk Detail, and Section Results for the specific Job.

14. The Audit Report will capture who initiated the request and who approved the WPR request and the date/time of those actions.