



QUICK REFERENCE GUIDE

Getting Started Guide (for evaluators)

This guide is for subject matter experts, tender evaluation team members, and people evaluating quotes. If this guide has an error or seems to be out-of-date, please email support@simplylogical.net. For additional help, please browse or search the online knowledgebase: [360 – Internal Portal Help Articles](#).

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INTRODUCING 360

360 is an online quote and tender evaluation system with two portals:

1. The Internal Portal allows buyers to:
 - a. Configure a request for tender, request for quote, and similar requests
 - b. Publish them openly (public) or to selected respondents (invitation-only)
 - c. Manage correspondence with respondents
 - d. Evaluate responses and rank the submissions
 - e. Maintain confidentiality with auditable records and information access logs
2. The Public Portal allows respondents of goods and services to:
 - a. Respond to the requests
 - b. Demonstrate their offer is good value for money
 - c. Be notified when requests are published and progressed

MOST IMPORTANT CONCEPTS

360 is a paperless system!

360 displays responses in a question-and-answer format online. The questionnaire often includes guidance for evaluators too.

Every evaluation criterion needs a score for every respondent!

To assess fairly, every respondent's response to a weighted question needs a score by every evaluator. To avoid bias, 360 does not allow one evaluator to score some respondents and another to score others.

Evaluators should be free to score as they see it – free from influence!

360 saves each evaluator's scores and thoughts securely. If your team uses consensus evaluations, the nominated consensus evaluator can adopt the team's average scores and combined comments.

Data in 360 must be treated as IN-CONFIDENCE information!

Respondents trust that all data is managed securely and that conflicts of interest are managed within best procurement practices. 360 has access and audit logs. If you have access to information that you don't think you should have, please alert the request manager immediately.



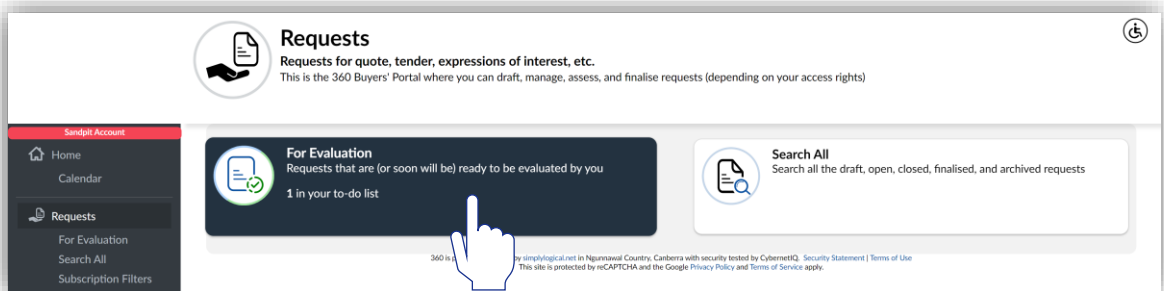
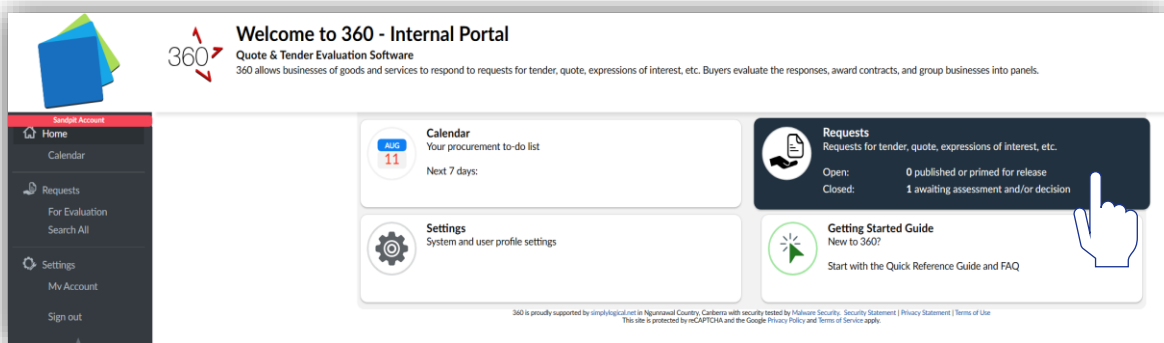
HOW TO EVALUATE A REQUEST (E.G. FOR TENDER) IN 360

QUICK LINKS

1. As a member of the Evaluation team
See: [How to evaluate a request \(e.g., for tender\) in 360](#)
2. As the Consensus Evaluator
See: [How to use consensus evaluations in the 360 internal portal](#)

GETTING STARTED

1. Sign in to the 360 Internal portal at <https://360users.apetsoftware.com.au/>
2. Go to Requests → For Evaluation



System Security! If you haven't been given "Evaluator" access rights to 360, you won't be able to see these options.



360 Quick Reference Guide for Evaluators

3. Click “View Responses for Evaluation” for the request that needs evaluating

For Evaluation
Requests that are (or soon will be) ready to be evaluated by you

Search by request ID or name

Demo (Evaluation)
Request ID: 24950
Type: Invitation-Only
Release date: 14/04/2022, 11:30 AM
Closed: 1 hour ago 14/04/2022, 12:00 PM
Evaluation due: (not specified)
Evaluation Stats: 0% evaluated

[View Responses for Evaluation](#)

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Request Security! If you haven't been given “Evaluator” access rights to the request or it's not ready for evaluating, you won't be able to see it.

EVALUATE ONE RESPONDENT AT A TIME

Procurement Security! The one respondent at a time view lists every respondent so you can check for conflicts of interest.

4. Click “List Respondents” on the “One Respondent at a Time” tile

360 Responses - Dashboard
Responses to the questionnaire & evaluation statistics
Request 24977 - Demo Evaluation Closed
Download: [W](#) Respondent List [XL](#) How much more are evaluating?

Request Overview

One Respondent at a Time
Responses to the questionnaire & evaluation completion percentages displayed one respondent at a time
Hint! This is the best mode for a complex Request for Tender
[List Respondents](#)

One Section/Question at a Time
Responses to the questionnaire & evaluation completion percentages displayed one section or one question at a time
[List Sections](#)

All Responses Grouped by Respondent
All respondents' responses to the questionnaire (without evaluation statistics)
Hint! This is the best mode for a simple Request for Quote
[Evaluate](#)

All Responses Grouped by Question
All respondents' responses to the questionnaire (without evaluation statistics)
[Evaluate](#)

Evaluation Tags
All the respondent's responses to the questionnaire that are tagged by the evaluator(s) for further attention
[View My Tags](#)

Instructions for Evaluators
1. Browse to the responses using one of the modes above
2. Score each and every response to each and every weighted question
3. Click this tile for more information

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[Help](#)



5. Click “Continue (Evaluate)” for the respondent whose responses you wish to evaluate

Responses - Respondent List
Lists all the respondents and with the evaluation progress percentage for their submissions
Request 24977 - Demo Evaluation

Search by provider ID, entity/business name, trading name, ABN, or email address

Don't show: Compliance Checked Evaluation Checked Show only: Short-listed

Download: [Respondent List](#)

Respondent	Price	Actions
Organisation's Entity Name A (Test Account) Continue (Evaluate) >	78% Refresh	Continue (Evaluate) >
Debriefing Notes: Draft created		
Organisation's Entity Name B (Test Account) Continue (Evaluate) >	0% Refresh	Continue (Evaluate) >
Organisation's Entity Name C (Test Account) Continue (Evaluate) >	6% Refresh	Continue (Evaluate) >
Organisation's Entity Name D (Test Account) Continue (Evaluate) >	6% Refresh	Continue (Evaluate) >
Organisation's Entity Name E (Test Account) Continue (Evaluate) >	7% Refresh	Continue (Evaluate) >

6. Click “Continue (Evaluate)” for the section you wish to evaluate

Sections with weighted questions (with a 0% icon completion status) must be scored until they are 100% complete (with a 100% icon)

Responses - Respondent's Submitted Sections
Lists all applicable sections for the respondent with the evaluation progress percentage for each
Request 24977 - Demo Evaluation
Provider 22820 - Organisation's Entity Name A (Test Account)

Next Provider >

1 Section 1 Category Selection Continue (Evaluate) >	2 Section 2 Part A - Compliance Criteria Continue (Evaluate) >
3 Section 3 A1 - Conflict of Interest 100% Continue (Evaluate) >	4 Section 4 A2 - Organisation Structure 100% Continue (Evaluate) >
5 Section 5 A4 - Insurance 0% Continue (Evaluate) >	6 Section 6 Part B - Qualitative Criteria (Non-financial) Continue (Evaluate) >
7 Section 7 B1 - WHS Management 100% Continue (Evaluate) >	8 Section 8 B3 - Local Benefits 100% Continue (Evaluate) >

Procurement Security! If the request manager has restricted your access and the respondent did not submit responses to questions you're permitted to see, the section list will be empty.



360 Quick Reference Guide for Evaluators

7. Review each question and response before scoring:

- ✓ **First**, view or show the question text
- ✓ **Second**, click the link (if available) to read the response and download any attachments
- ✓ **Third**, view the scoring options (numbers or labels equivalent to 0% to 100%)
- ✓ **Fourth**, follow the evaluation guide (if available)

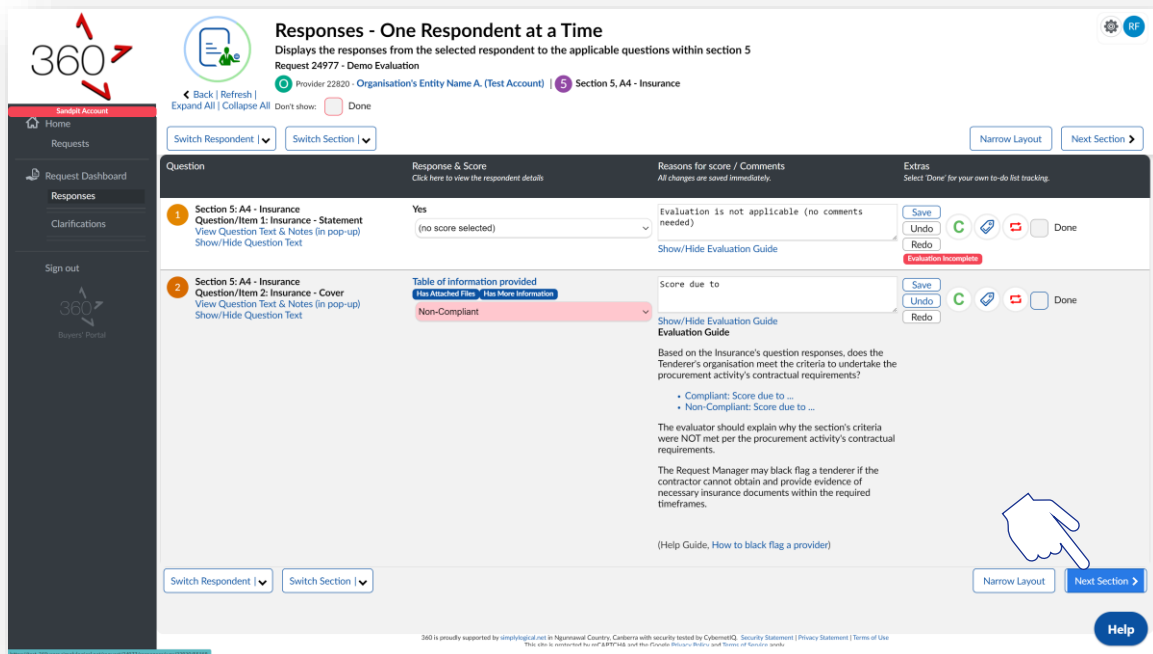
8. Select a score and enter a reason for your score in accordance with the evaluation guide. Use the evaluation guide's short-cuts (if available)


The request manager can add short-cuts in each question's evaluation guide.

Policy Type	Insurer - Broker	Policy Number	Value \$	Expiry Date	COC attached (Yes/No)	Notes for evaluators (i.e. will increase cover value if successful)
Public Liability	AMMI	B46465	\$200,000	22/06/2023	Yes	NA
Workers Compensation... or Personal Accident Insurance Cover	AMMI	B54564	\$200,000	15/06/2023	Yes	NA
Professional Liability	AMMI	NF4545	\$20,000	30/06/2022	Yes	Will increase cover level if successful
Product Liability	AMMI	B4645	\$2,000,000	15/06/2023	Yes	NA



9. Continue to the “Next Section” when you’re done with the current list



10. Repeat points 6 to 9 above until your evaluation status for all sections and for all respondents is 100% completed. 

Important! Each question might have a different weighting so avoid “swings and roundabouts” in your scoring.

Score each response on its merits.

Be careful. Be deliberate. Be fair.

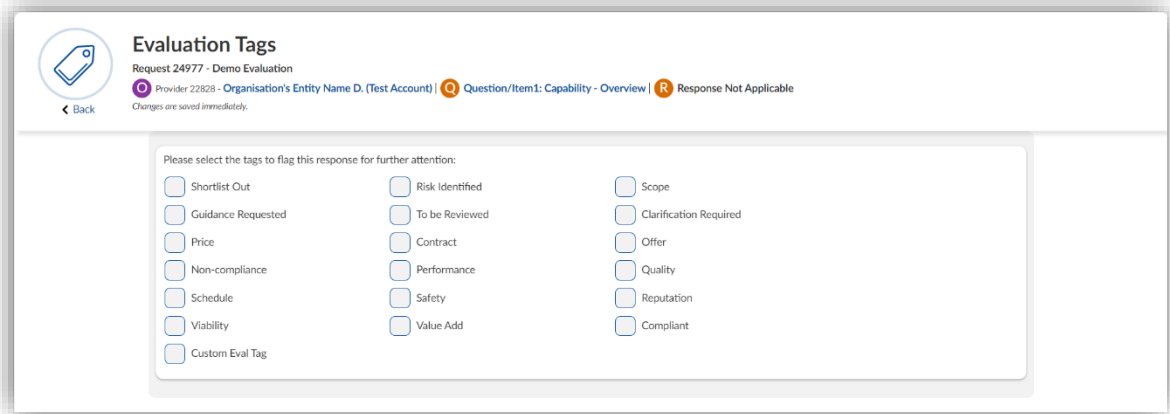


TAGS, CLARIFICATIONS, AND RISK ASSESSMENTS

For efficiency, 360 is designed for passive feedback to the request manager by way of tags, clarifications, and risk assessments.

TAGS

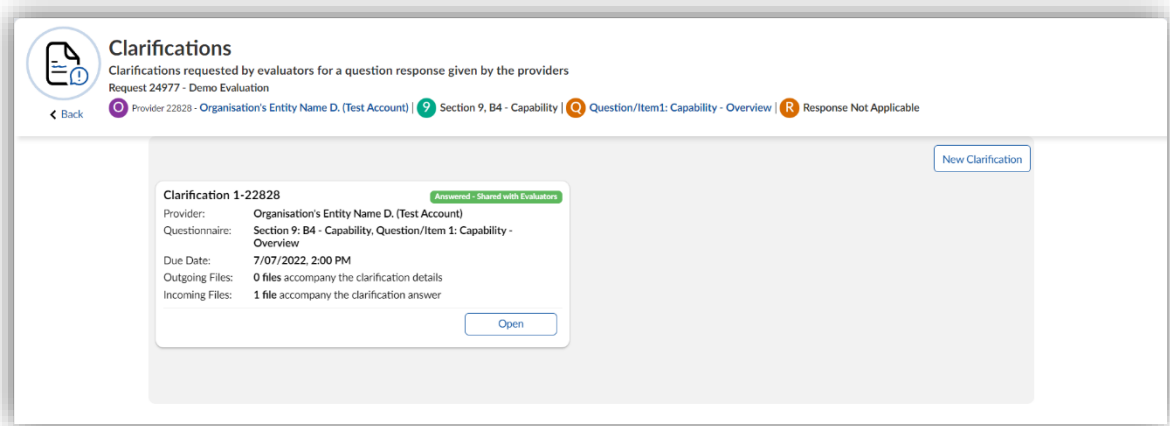
Tag a response for follow-up by the request manager – for example: “Guidance Requested” or “To be reviewed”.



Request managers can view all tags and can deselect tags when the issue has been dealt with.

CLARIFICATIONS

Seek more information from a respondent regarding their response to a question.




Clarifications can only be issued and shared by request managers as per this workflow:

- “Not Issued” can transition to “Issued” or “Cancelled”
- “Issued” can transition to “Answered – Pending Review” or “Expired”
- “Answered – Pending Review” can transition to “Answered – Shared with Evaluators” or “Cancelled”



RISK ASSESSMENTS

Apply a penalty to a score by identifying unmitigated risks with likelihood and consequence.





⏪ Back


Unmitigated Risk Assessment


Important!
If you assess risk for one provider's response to this question, you must assess risk for all providers' responses to this question.
Changes are saved immediately.


What is affected? Select one or more risk-affected elements:


Cost
(risk of cost blow-out)


Contract
(risk of variation)


Offer
(risk of not being fit-for-purpose)


Compliance (e.g. OSH)
(risk of non-adherence to the contract)


Performance
(risk of delay)

Score: Select a cell in the matrix:

		Likelihood				
		Rare	Unlikely	Moderate	Likely	Highly likely
Consequence	Critical	Medium (20%)	High (40%)	Very High (60%)	Extreme (70%)	Almost Certain (100%)
	Major	Low (10%)	Medium (20%)	High (40%)	Very High (60%)	Extreme (70%)
	Moderate	Low (10%)	Low (10%)	Medium (20%)	High (40%)	Very High (60%)
	Minor	Very Low (8%)	Low (10%)	Low (10%)	Medium (20%)	High (40%)
	Insignificant	Negligible (0%)	Very Low (8%)	Low (10%)	Low (10%)	Medium (20%)

Reason for score:

How risk assessments work: i The Value for Money (VFM) algorithm uses Risk Assessed Scores. The Risk Assessed Score is the selected percentage less than the Raw Score (which is selected from the drop-down).

Save
Back

Request managers cannot remove or adjust risk assessments but they can turn off the risk assessment feature. The feature is best suited to risk-based criteria such as WHS.

Important!

If you assess risk for one respondent's response to a question, you must assess risk for all respondents' responses to the same question.



OPTIONS

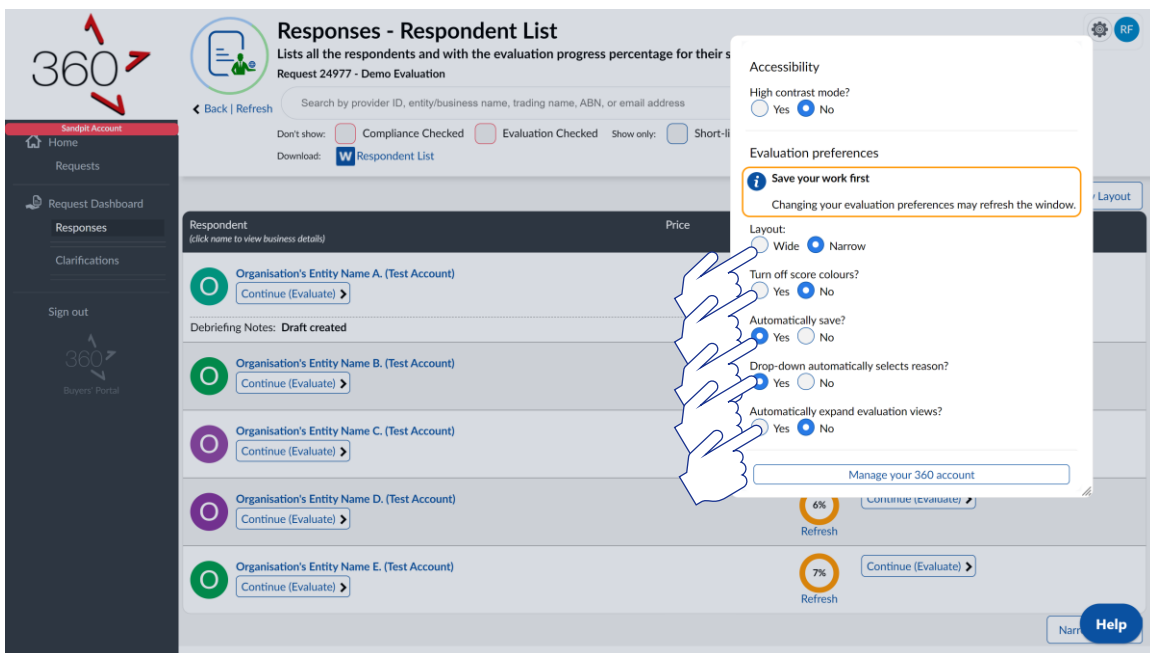
Most questionnaires have a range of criteria. Some criteria are easier to evaluate en-masse whereas others are best evaluated in isolation – free from distracting information. Some responses should be considered within context and others are best compared against alternatives.

To support questionnaire variability, 360 has many evaluation modes and preferences.

Choose the evaluation mode and preferences that work best for you!

EVALUATION PREFERENCES

The quick-settings menu at the top of every page has evaluation preferences.



Your preferences may change for different parts of the questionnaire.

- If you need to read long responses, the narrow layout may be best
- If you find 360's colour-coded scores distracting, you may prefer to turn them off
- If you find 360 is saving too frequently, you may wish to turn off auto-save
- If the evaluation guidance is to use definitions with rare or infrequent deviation, you may wish to have 360 automatically select the definition when you select a score from the drop-down list
- If you want the evaluation guides (if provided) to automatically expand.

EVALUATION MODES

360 has five evaluation modes:

1. **One Respondent at a Time** (with wide and narrow layouts)
This mode is best if you prefer to read a respondent's complete submission (so each answer is read within context) and the questionnaire is divided into logical sections



2. **One Question at a Time** (with wide and narrow layouts)

This mode is best if you prefer to read each respondent's answer to each question and compare it against alternatives (applies with apples comparisons)

Responses - One Question at a Time
Displays the responses to the selected question from all respondents
Request 24977 - Demo Evaluation

Section 11. C1 - Designer/Engineer Services | Question/Item: Design/Engineer Pricing - Daily Rates

Search by provider ID, entity/business name, trading name, ABN, or email address

Response

Organisation's Entity Name B. (Test Account)
Provider ID: 22822
ABN: (not specified)

Section 11: C1 - Designer/Engineer Services
Question/Item 1: Design/Engineer Pricing - Daily Rates

Price List details provided
Sum of prices: \$2,700.00

Add Designer or Engineer services offered	Daily Price (Excluding GST)	Any additional information on the service offering
Level 1 Designer	\$800.00	
Level 2 Designer	\$900.00	
Level 3 Designer	\$1,000.00	
Sum of prices: \$2,700.00		

Switch Section | Switch Question

Response

Organisation's Entity Name A. (Test Account)
Provider ID: 22820
ABN: (not specified)

Section 11: C1 - Designer/Engineer Services
Question/Item 1: Design/Engineer Pricing - Daily Rates

Price List details provided
Sum of prices: \$13,800.00

Add Designer or Engineer services offered	Daily Price (Excluding GST)	Any additional information on the service offering
Engineer Level 1	\$600.00	1 plus year experience View full response
Engineer Level 2	\$800.00	2 plus years experience View full response
Engineer Level 3	\$10,000.00	3 plus years experience

Switch Section | Switch Question

3. **One Section at a Time** (with detailed and concise layouts)

This mode is best for sections comprised of many mandatory, compliance-based questions where respondents are either going to be fully compliant or non-compliant.

Responses - One Section at a Time
Displays the responses to a section's questions from all respondents (detailed layout)
Request 24977 - Demo Evaluation

Section 5. A4 - Insurance

Don't show: Done Show only: Short-listed

Switch Section | Switch To...

Concise Layout

Respondent & Responses
(click on respondent name to view all question responses)

1 Insurance - Statement | 2 Insurance - Cover

Organisation's Entity Name A. (Test Account)

Yes
Satisfactory
Save Undo Redo
Edit Comments Done

Table of information provided
Has Attached Files Has More Information
Non-Compliant
Save Undo Redo
Edit Comments Done

Organisation's Entity Name B. (Test Account)

Yes
(no score selected)
Save Undo Redo
Edit Comments Evaluation Incomplete Done

Table of information provided
Has Attached Files Has More Information
(no score selected)
Save Undo Redo
Edit Comments Evaluation Incomplete Done

Organisation's Entity Name C. (Test Account)

Yes
(no score selected)
Save Undo Redo
Edit Comments Evaluation Incomplete Done

Table of information provided
Has Attached Files Has More Information
(no score selected)
Save Undo Redo
Edit Comments Evaluation Incomplete Done

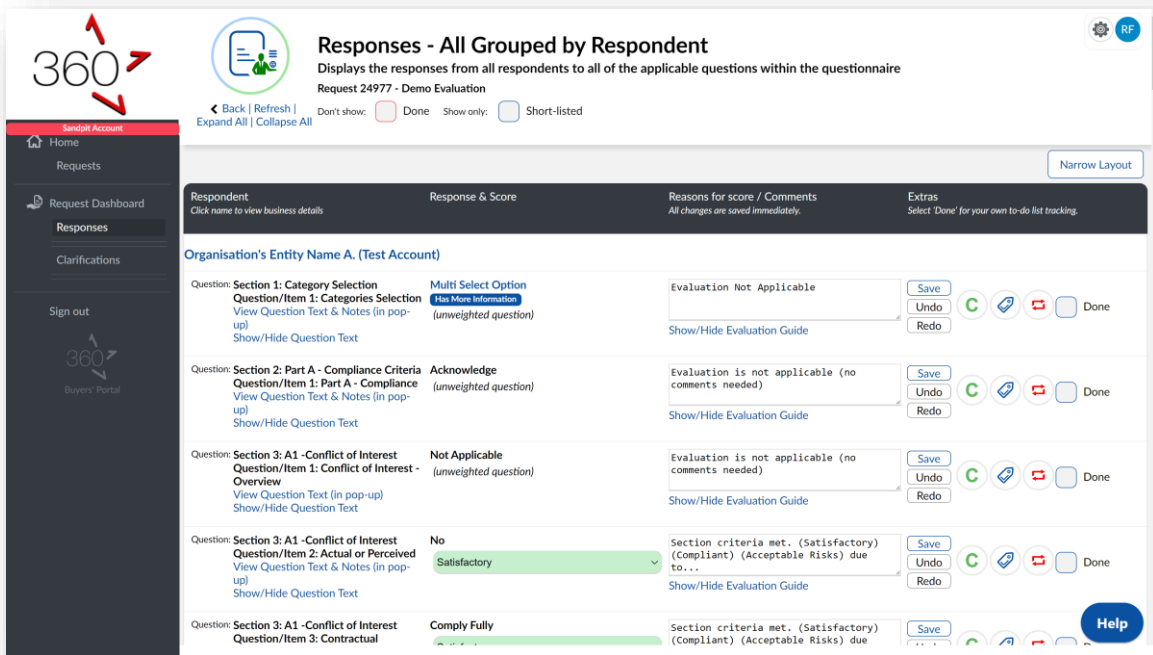
Home
Calendar
For Evaluation
All Requests
Request Dashboard
Responses
Finance VFM
Assessment
Clarifications
Sign out
360
Buyers' Portal

Help



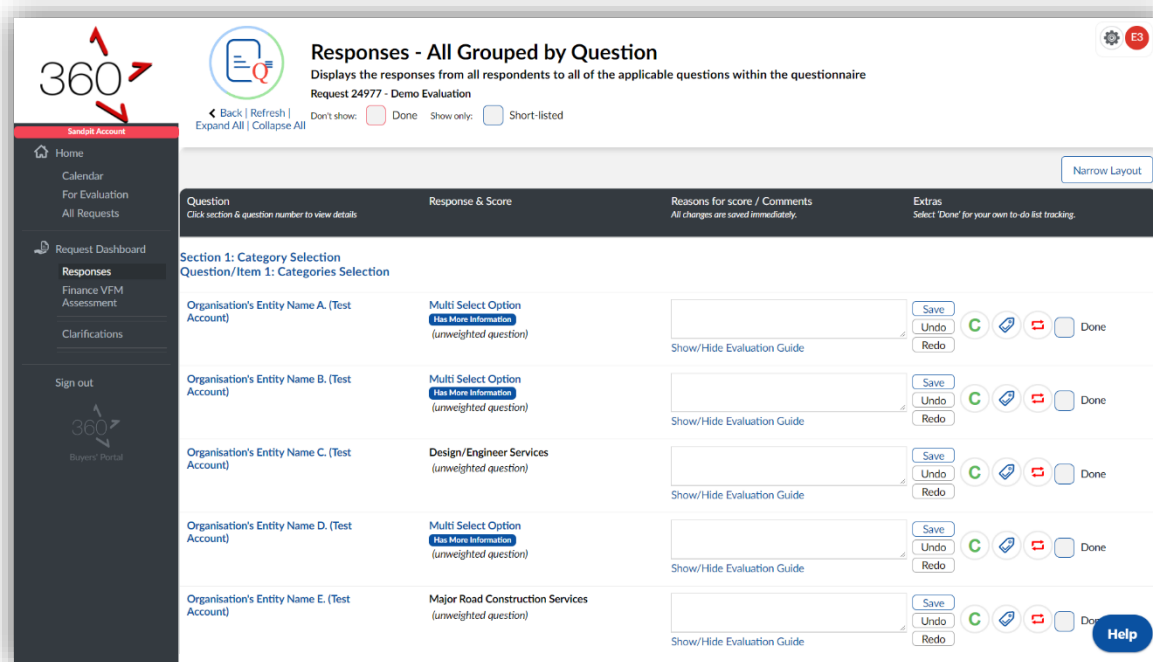
4. **All Responses Grouped by Respondent** (with wide and narrow layouts)

This mode is best if you prefer to read a respondent's complete submission (so each answer is read within context) and the questionnaire is short.



5. **All Responses Grouped by Question** (with wide and narrow layouts)

This mode is best if you prefer to read each respondent's answer to each question and compare it against alternatives (apples with apples comparisons) and the questionnaire is short.



FREQUENTLY ASKED QUESTIONS

IF I HAVE A QUESTION, WHO DO I ASK?

If it's a question about the request's contents or a respondent's response, please contact the request manager.

If it's a question about how to use 360 or if there seems to be an error with the system, please contact the technical support team:

- ✓ support@simplylogical.net
- ✓ 02 51 004 009

NOTES

1. The Tags feature allows an issue to be identified without affecting a respondent's scores (unlike the Risk Assessment feature)
2. The technical support team is not authorised to speak to a request's contents or a respondent's response.

HOW DO I FIND A REQUEST FOR TENDER TO EVALUATE?

If you have the right to evaluate it, you'll find it in the [Requests – For Evaluation](#) list.

WHAT OPTIONS DO I HAVE WHEN SCORING?

It depends on the system settings, request configuration settings, and question configuration settings. The options are:

- ✓ Score by number (the higher the number, the better the score)
- ✓ Score by label (the labels will hopefully be unambiguous)
- ✓ View the evaluation guide for each question
- ✓ Click to score and comment (if the evaluation guide has been configured to do so)
- ✓ Comment (justify your score)
- ✓ Seek clarifications
- ✓ Tag responses to communicate concerns with a single click – e.g., "Guidance Requested", "To be reviewed", "Risk Identified", or something else for the tags list
- ✓ Assess risk by identifying the likelihood and consequence of an unmitigated scenario so that the respondents representing high-risk receiving a lower ranking than others

DO I HAVE TO SCORE EVERYTHING?

Yes. Everywhere you're prompted for a score will need a score and, depending on the system settings, every response may require a comment.

A RESPONDENT'S RESPONSE IS NON-COMPLIANT; WHAT DO I DO?

Tag the respondent and/or contact the request manager. If the respondent is non-compliant, the request manager can black-flag them. Black-flagged respondents' responses do not require further evaluation.



CAN I EDIT A RESPONDENT'S TENDERED PRICE IF IT IS INCORRECT?

It depends on your access rights to the request and the system settings. It is common for the request manager to set themselves as the evaluator for prices, with all other evaluators restricted from seeing prices.

See: [How to assign a comparison price for fixed-price tenders and quotes](#)

HOW DOES A RISK ASSESSMENT AFFECT A RESPONDENT'S RANKING?

A risk assessment applies a penalty to the value for money assessment separately from the raw score. The higher the risk, the greater the score penalty, resulting in a lower Risk Assessed Ranking for that respondent compared to those assessed as having lower risk. If assessing risk for one respondent, it should be done for all – even for those where the risk assessment is “Nil”.

See: [How to assess risk when evaluating a respondent's response in 360](#)

HOW DOES THE “TAGS” FEATURE WORK?

Use evaluation tags to highlight responses in a standard and straightforward way. They quickly highlight work to be done without delaying the evaluation process. The request manager usually monitors the evaluation team's progress with a report that contains tags and evaluation completion statistics.

HOW DOES THE “CONSENSUS EVALUATION” FEATURE WORK?

Often the request manager sets themselves to be the consensus evaluator when the evaluation team has done as much as they can do. They adopt the non-contentious scores, ensure comments are okay for respondent debriefings, and then facilitate a meeting so the evaluation team can reach consensus.

The individual evaluators' scores are recorded but are not used to rank the respondents.

CAN I BE NOTIFIED WHEN A REQUEST FOR TENDER IS TO BE EVALUATED?

Yes, but the notifications are controlled by the request manager.

The request manager has the option to send a "You have been selected to evaluate..." message when the request is published and/or when the evaluation team is assigned.

Best procurement practice is to select the evaluation team prior to publishing a request for tender but keep it secret until after it is closed.

WHAT DO I NEED TO EVALUATE RESPONSES TO A REQUEST FOR TENDER?

A good internet connection and a modern web browser.

For specifics, see: [Minimum system requirements to use 360](#)



IMPORTANT PROBITY-BASED QUESTIONS

I'VE DISCOVERED A CONFLICT OF INTEREST; WHAT DO I DO?

Contact the request manager. The request manager will apply appropriate measures to ensure the integrity of the procurement process. Options available to them include:

- ✓ Adjusting the evaluation team
- ✓ Recording an audit log entry

I'M BEING PRESSURED TO CHANGE MY SCORES; CAN 360 HELP ME?

Yes. 360 has two systems that can help:

1. Anyone with access to a request can record an audit log entry. People with the request manager, reporter, boss, and overseer access rights will be able to download the audit log and see your entry.
2. 360 records the history of every score and comment saved. Your original scores and comments can be revealed if there is an audit or investigation by lodging a help-desk request via support@simplylogical.net.

*Using 360 is protection against corrupt activity.
We at simplylogical.net are committed to our ideals for 360:*

CONFIDENCE | **VALUE** | INTEGRITY

