



# Vendor Qualification User Guide

Passport 360 enables clients to boost their procurement process by seamlessly integrating with their existing supply chain systems, thereby providing further in-depth data to decision makers.

# Vendor Qualification User Guide

## Notice

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## Passport 360

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## Quick Tips

TIP 1: Use the  resend function available to resend an invitation.

TIP 2: For easy searching of a specific item, use the “Search” selection.



TIP 3: To edit an items in Vendor Management, use the  edit option available.

TIP 4: To view any items use the view option available.



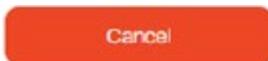
TIP 5: To delete a component, select the item and delete.



TIP 6: Use the download function to download documents. delete.



TIP 7: To cancel any action at any given point, simply select the cancel button to return to the previous field. documents. delete.



# Create and Manage a Prequalification

# 01

## Internet Browser settings

Although Google Chrome is the recommended browser for optimal site performance, Passport 360 is supported by all popular browsers.

# 1. Create and Manage a Prequalification

Navigate to  available on your dashboard

Select 

## 1.1 Create your question sets and question scoring

Select 

Select your “**Question Settings**” to add scoring to your question.



*Note: The system automatically gives you a score rating of 1 – 5 to choose from. 1 being the lowest in score and 5 being the highest in score.*

Add your question scoring as needed and save. E.g. below

**Score Options**

1	No plan or risk assessment in place
2	Plan or risk assessment in place
3	Partial compliance to Passport360 requirements
4	Full compliance to Passport360 requirements
5	Contractor system mirrors Passport 360 compliance for more than 3 years

Once you have added questions to your question scoring, navigate back to “Manage Question Groups” and then select 

Add Question Group ✕

---

Group Name

Display Order

✕ Cancel
Save

Add your Group Name and select the display order. Once complete, select “Save”.

To add questions to your group, navigate to the group you have just created or use the search field to find your group, then select the 

Select 

*Note: You will notice that it requires you to select a Heading name and a weighting to the question. This is considered a question set within the question group. This allows you to group your questions according to their scope / department / requirement to mention a few examples.*

Add Heading ✕

---

Heading Name

Display Order

Weighting

✕ Cancel
Save

Once you have created your question set headings, they will display in a list format.

Headings

+ Add Edit Delete Search

	Heading Name	Display Order	Weighting(%)
	Contractor Management and Policies	1	40
	Risk and Operational Control	2	40
	Competence and Fitness to work	3	20

1 of 1 pages (3 items)

The next step is to add questions within the question sets created. Select the

button and then select the button.

### Add Question ×

#### Question

Is there a written and approved company SHE policy?

Add your question

#### Type

Score

Score

Text

Upload

Cost

Yes / No

Message

Date

Select the type of question this will be.

*Note: Details per question type explained below.*

**Score:** This is created right at the beginning, whereby your Service Provider will choose one of the questions, 1 – 5, whereby the value of the question that they choose will give them a score of 1 – 5.

**Text:** This is free text for the Service Provider to answer the question as needed.

**Upload:** This requires the Service Provider to upload a supporting document.

**Cost:** This requires the Service Provider to add a costing, add a value to the question.

**Yes/ No:** This requires a Yes or No answer from your Service Provider.

**Message:** This is used as a way for the Corporate Client to add a “note” to the question, so for example, if the answer is “Yes” to this question then the following is required. This is used as a “Note” whereby you are informing the Service Provider of an additional requirement over and above the question.

**Date:** This requires the Service Provider to add a date.

Allow Adjudication



Question Mandatory



Click Yes or No for “Allow Adjudication”

Click Yes or No for “Question Mandatory”

The display order will populate as you add your questions, however if you need it to display in a different order, you can edit it as needed.

Display Order

Add a Weighting value to your question to give it a value of importance.

Weighting

Once you have completed the fields, select



Your question set will appear in the grid display such as the example below.

Questions: Contractor Management and Policies



Question	Type	Allow Adjudication	Question Mandatory	Display Order	Weighting(%)
Is there a written and approved company SHE policy?	Score	Yes	Yes	1	33.33
How is the policy managed, communicated, approved in your organisation?	Text	Yes	Yes	2	16.67
Upload Policy Documents	Upload	Yes	Yes	3	16.67
Does your company have a documented Drug and Alcohol Policy?	Score	Yes	Yes	4	33.33

*Note: The system automatically takes your weighting and divides into a percentage out of 100.*

If you need to edit the question, highlight the item that you would like to edit by clicking on the question and select



Once you have edited the details, select



If you need to delete the question, highlight the item that you would like to delete by clicking on the question and select



*Note: To tell if the item is correctly selected, the line item will display in a light grey color so that you can be assured that you are selecting the correct item.*

## 1.2 Create your Pre-Qualification to send to potential Contractors

Select the  button.



Select your question groups, select your adjudicators, and lastly your users that need to receive a notification once the adjudication is submitted.

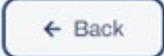
*Note: In each of these fields you can have multiple selections.*

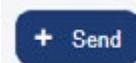
Question Groups

Adjudicators

Users to receive a notification on invitation adjudication submission

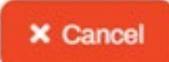
 

Once your Prequalification is created, select  and then select 

Now you need to send the invitation to potential Contractors by selecting 

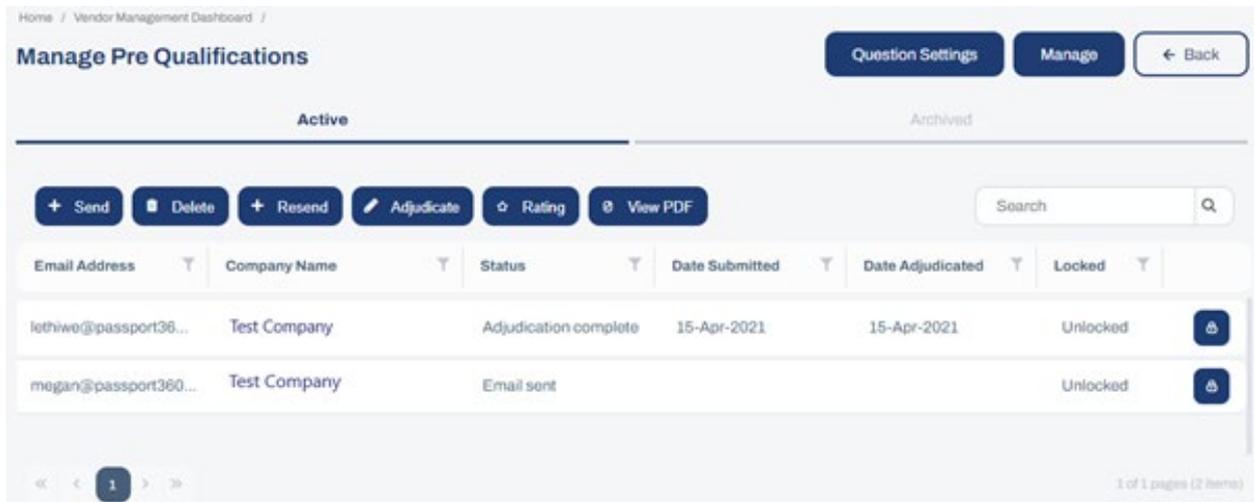
Send Invitation ×

Email Address

Add the Contractors email address in the available field and select "save".

All your invitations will appear in a list such as the below example.



*Note: The Status will change according to the actions performed in the process of the prequalification.*

### 1.3 Adjudicate the Pre Qualification

Once the Contractor has submitted their prequalification the Adjudicators will receive a notification advising them that a Service Provider has submitted their Prequalification.



The status will appear as “Answering Complete.”

Click on the Contractor that you would like to adjudicate and then select  
 Check the details of the Employees and the Equipment items and select



Read through all the details and finally when you reach **Pre Qualification Questions** you will need to add your scoring as well as your comments where applicable.

Once you have completed your adjudication, select **Submit**

Add your final comments and if you would like to lock the invitation, tick it and “Submit”

## Invoice Management



Final Comment

Lock Invitation

Submit

The status will now have updated and you will be able to see that the prequalification is now locked.

megan@passport360...	Anglo American	Adjudication complete	15-Apr-2021	15-Apr-2021	Locked	
----------------------	----------------	-----------------------	-------------	-------------	--------	--

- To resend an invitation click on the Contractor and select **+ Resend**
- To look at the Contractors star rating, select **Rating** and the below will appear.

**Rating** x

---

**Score Percent**

68.00%

★★★★★

---

**Adjudication Percent**

54.67%

★★★★★

---

**Historical Safety Performance**

32.50%

---

Date Submitted: 15-Apr-2021

Date Adjudicated: 15-Apr-2021

- To view the prequalification in PDF format, select

**View PDF**



Pre Qualification: Test Company  
 Answered by: Passport 360

Pre Qualification Questions

Contractor Management and Policies		
Question	SP Answer	Adjudication Answer
Is there a written and approved company SHE policy?	2	2
How is the policy managed, communicated, approved in your organisation?	Well	Fine
Upload Policy Documents	<a href="#">View</a>	Fine
Does your company have a documented Drug and Alcohol Policy?	3	2

# Create and Manage Enquiries

# 02

## Internet Browser settings

Although Google Chrome is the recommended browser for optimal site performance, Passport 360 is supported by all popular browsers.

## 2. Create and Manage Enquiries

Select the  button

*Note: Your question sets will already be created within the Prequalification phase, so those question sets will already populate in the Enquiries grid. If you would like to add additional question sets, you can do so by going through the same steps mentioned in (1.1)*

To create a new enquiry, select  Fill in the details required in each field.

Enquiry Number

Description

Business Unit:  Project Manager:  Project Name:

Close Date

Scope of Work

Category

Question Groups

Adjudicators

Users to receive a notification on invitation adjudication submission

Users to receive a notification on all invitations locked. Once all enquiries are complete and ready for award

Enquiry Documents

Or drop files here

Contracting Strategy

Or drop files here

Hazards Related to Scope of Work

Machinery & Equipment (Conveyors etc)

No

Noise

No

Excavations

No

Hazardous Chemicals

No

Mobile Mining Equipment or Vehicles

No

Gases

No

Electricity (Stored Energy)

No

Thermal Stress

No

Radiation

No

Abnormal Loads

No

Fatigue (Shift Work)

No

Working close to water hazards

No

Heights

No

Tension (Stored Energy)

No

Falls of Roof / Sides / Engulfment

No

Dust

No

Hot Work

No

Materials and Tools Handling

No

Blasting

No

Confined Spaces

No

Gravity / Suspended Loads (Stored Energy)

No

Waste Management

No

To create a new enquiry, select  Fill in the details required in each field.

Your list of enquiries will display in the grid such as the below example.

Home / Vendor Management Dashboard /

### Manage Enquiry

Active Awaiting Archived

Search

Enquiry Number	Description	Project Name	Close Date	Scope of Work	Category	Question Groups
12344567789	Demo	Onsite or Maintan...	29-Apr-2021	Demo Scope	Competitive Sour...	Pre Qualification Questions

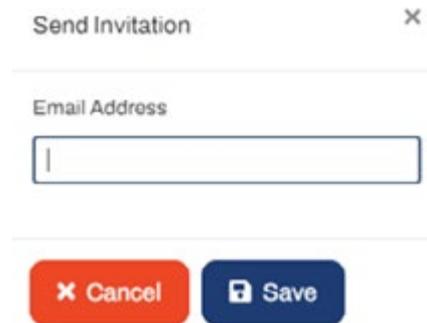
Once your enquiries are created per project, you will now be required to send your enquiry invitations to the “shortlisted” Contractors.

Click on the enquiry invitation that you would like to send, and then select 

Select  Fill in the Contractors email address and “save”

Fill in the Contractors email address and “save”

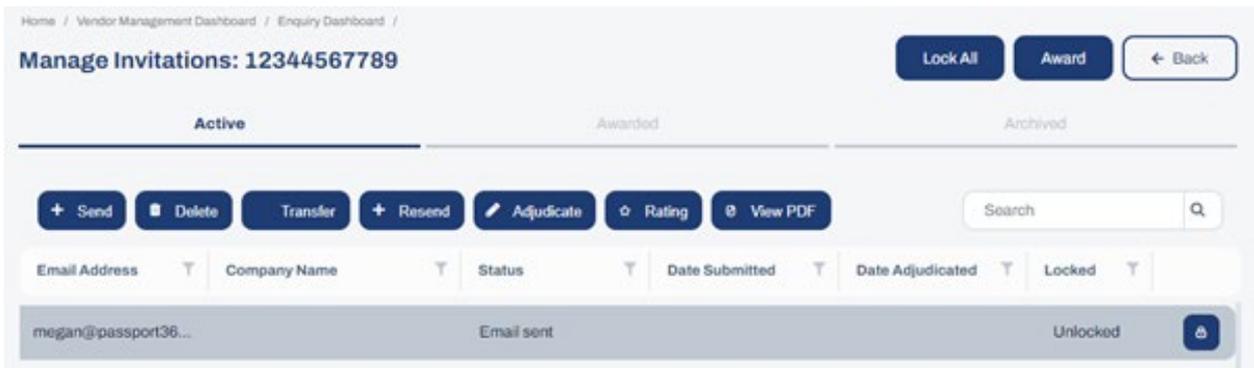
*Note: The Status will change according to the actions performed in the process of the Enquiry.*



Send Invitation X

Email Address

X Cancel
Save



Home / Vendor Management Dashboard / Enquiry Dashboard /

**Manage Invitations: 12344567789** 
Lock All
Award
← Back

+ Send
Delete
Transfer
+ Resend
Adjudicate
Rating
View PDF
Search Q

Email Address	Company Name	Status	Date Submitted	Date Adjudicated	Locked
megan@passport36...		Email sent			Unlocked <span style="float: right; background-color: #003366; color: white; padding: 2px 5px; border-radius: 5px;">🔒</span>

Once the Contractor has submitted their Enquiry the Adjudicators will receive a notification advising them that a Service Provider has submitted their Enquiry.



megan@passport36...	Anglo American	Answering Complete	16-Apr-2021	Unlocked <span style="float: right; background-color: #003366; color: white; padding: 2px 5px; border-radius: 5px;">🔒</span>
---------------------	----------------	--------------------	-------------	--

The status will appear as “Answering Complete.”

Click on the Contractor that you would like to adjudicate and then select 

Check the details of the Employees and the Equipment items and select 

Read through all the details and finally when you reach **Pre Qualification Questions** you will need to add your scoring as well as your comments where applicable.

Once you have completed your adjudication, select



Add your final comments and if you would like to lock the invitation, tick it and "Submit"

**Invoice Management** ×

Final Comment

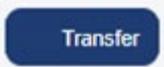
Lock Invitation

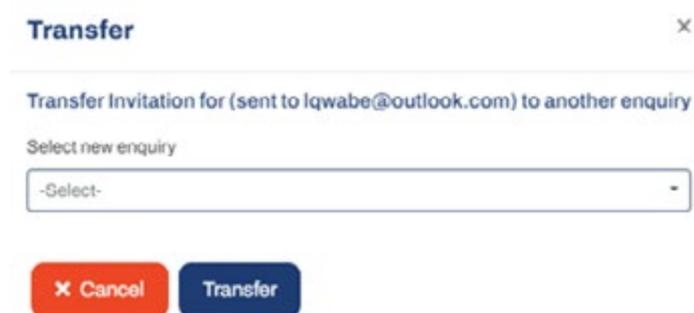
**Submit**

The status will now have updated, and you will be able to see that the enquiry is now locked.

## 2.1 Transfer Contractor Enquiries

If you realize that you have sent the wrong enquiry to the Service Provider, however they have gone through the entire process of submitting all their details for the specified enquiry. You can transfer all their answered questions, supplied information, and transfer it to the “correct” enquiry.

Simply select the Contractor’s enquiry that you need to transfer and select the  button.

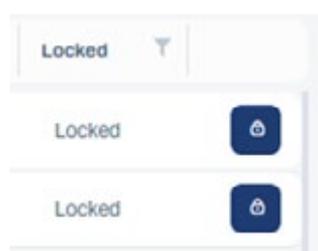


Before awarding the PO to a specific Contractor, it is important to note that you are now required to Lock all of the invitations to for the specified enquiry, so that you can award the Tender with no further submissions being submitted.

Select the  button. You will be asked to conform your actions and select “ok”.



The status of all the invitations will now display as “locked.”



Award PO after

# Enquiry Process

# 03

## Internet Browser settings

Although Google Chrome is the recommended browser for optimal site performance, Passport 360 is supported by all popular browsers.

### 3. Award PO after enquiry process

Before awarding the PO, you can display a quick comparison report, by navigating to the below field within your Active Enquiries. Select the Service Providers that you would like to compare, and a quick view of their scoring will be displayed.

Quick Comparison
Comparison Report

Service Provider

Service Provider

Service Provider

Service Provider

**Quick Comparison**

Service Provider

Service Provider

**Score Percent**

74.67%

★ ★ ★ ★ ★

---

**Adjudication Percent**

92.00%

★ ★ ★ ★ ★

---

**Historical Safety Performance**

55.00%

**Score Percent**

74.67%

★ ★ ★ ★ ★

---

**Adjudication Percent**

92.00%

★ ★ ★ ★ ★

---

**Historical Safety Performance**

55.00%

**Hazards Related to Scope of Work**

40.32%

**Hazards Related to Scope of Work**

40.32%

---

**Cost**

\$0.00

---

**Average Cost**

\$0.00

---

Date Submitted: 10-Apr-2021

Date Adjudicated: 10-Apr-2021

---

**Pre Qualification**

Score Percent

68.00%

**Cost**

\$0.00

---

**Average Cost**

\$0.00

---

Date Submitted: 10-Apr-2021

Date Adjudicated: 10-Apr-2021

---

**Pre Qualification**

Score Percent

68.00%

★ ★ ★ ★ ★

---

**Adjudication Percent**

54.67%

★ ★ ★ ★ ★

---

**Historical Safety Performance**

32.50%

Date Submitted: 15-Apr-2021

Date Adjudicated: 16-Apr-2021

★ ★ ★ ★ ★

---

**Adjudication Percent**

54.67%

★ ★ ★ ★ ★

---

**Historical Safety Performance**

32.50%

Date Submitted: 15-Apr-2021

Date Adjudicated: 16-Apr-2021

When you are ready to Award the PO to a Contractor, select .  
Fill in the details of the contractor to award the tender to.



**Award**



Service Provider

Start Date

End Date

Contact Number (Anglo American)

Vendor Number

Registration Number

Business Unit

Project Manager

Project Name



Once you are complete, select



### 3.1 Award PO without going through the enquiry process

#### Award PO

Award a tender without going through the enquiry process

Select "Award PO", fill in the required details and lastly select "save" as displayed in below example.



**Award** X

---

Email Address

Start Date  End Date

Purchase Order

Vendor Number

Registration Number

Business Unit  Project Manager

Project Name

X Cancel Save

A list of Awarded POs will be displayed with the detailed information for easy referral.

Award PO					
Award					
Email Address	Purchase Order	Vendor Number	Registration N...	Start Date	End Date
demo@passport3...	1234	ABC	ABC	17-Apr-2021	29-Apr-2022

Manage

# Evaluations

# 04

## Internet Browser settings

Although Google Chrome is the recommended browser for optimal site performance, Passport 360 is supported by all popular browsers.

## 4. Manage Evaluations

### Evaluations

Manage your Contractors feedback.

Manage Evaluations

Select "Award PO", fill in the required details and lastly select "save" as displayed in below example.

Once the Contractors work is complete, you need to add a termination evaluation to the Contractors work, so that for future work that needs to be completed, you will be able to use your Evaluations feedback to decide if you would like to use the specified Contractor again.

Create your questions by selecting

Question Settings

Select

+ Add

Add Question

X

Question

Type

Score

Question Mandatory

Yes

Display Order

3

Weighting

0.00

Fill in all the details as required.

X Cancel

Save

*Note: Evaluations are completed within the Project Compliance field. View the Contractor SHE File that you would like to evaluate and refer to the evaluations tab. You will be required to fill in the questions for submission. Take further note that it is advised to complete a "Termination Evaluation" before your Contractor starts the Offboarding process.*

Learn more: [www.passport360.com](http://www.passport360.com)

*Find us on the Microsoft Appsource and the Azure Marketplace*