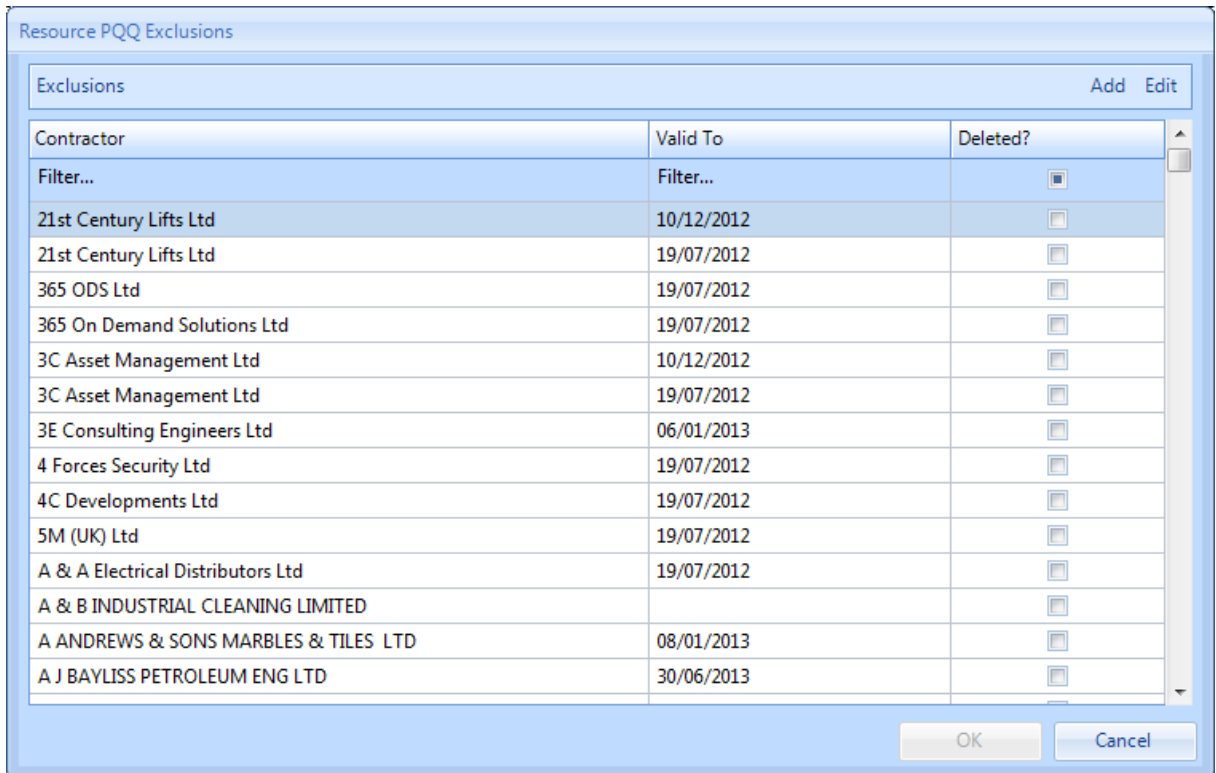


Pre-Qualification

Wed, Jan 17, 2024 Resources

Should Pre-Qualification be enabled for the system, administration of Pre-Qualification will be required. This can be done by clicking the "Pre-Qualification" button.

1. Clicking the "Pre-Qualification" button, displays the Resource PQQ Exclusions screen. Here, a list of all the current Resources that have PQQ Records are shown and it's possible to add new ones to the list.



The screenshot shows a window titled "Resource PQQ Exclusions". Inside, there is a table with three columns: "Contractor", "Valid To", and "Deleted?". The table contains 16 rows of data. At the top right of the table area are "Add" and "Edit" buttons. At the bottom right are "OK" and "Cancel" buttons.

| Contractor | Valid To | Deleted? |
|--------------------------------------|------------|--------------------------|
| Filter... | Filter... | <input type="checkbox"/> |
| 21st Century Lifts Ltd | 10/12/2012 | <input type="checkbox"/> |
| 21st Century Lifts Ltd | 19/07/2012 | <input type="checkbox"/> |
| 365 ODS Ltd | 19/07/2012 | <input type="checkbox"/> |
| 365 On Demand Solutions Ltd | 19/07/2012 | <input type="checkbox"/> |
| 3C Asset Management Ltd | 10/12/2012 | <input type="checkbox"/> |
| 3C Asset Management Ltd | 19/07/2012 | <input type="checkbox"/> |
| 3E Consulting Engineers Ltd | 06/01/2013 | <input type="checkbox"/> |
| 4 Forces Security Ltd | 19/07/2012 | <input type="checkbox"/> |
| 4C Developments Ltd | 19/07/2012 | <input type="checkbox"/> |
| 5M (UK) Ltd | 19/07/2012 | <input type="checkbox"/> |
| A & A Electrical Distributors Ltd | 19/07/2012 | <input type="checkbox"/> |
| A & B INDUSTRIAL CLEANING LIMITED | | <input type="checkbox"/> |
| A ANDREWS & SONS MARBLES & TILES LTD | 08/01/2013 | <input type="checkbox"/> |
| A J BAYLISS PETROLEUM ENG LTD | 30/06/2013 | <input type="checkbox"/> |

2. After clicking "Add", choose a Client from the list. For information on how to select a Client, see the [Client Selection](#) page.
3. Next, the Select Resource(s) screen is displayed. Provide a Source and Reference to define the exclusion and an Exclusion Valid To date to state how long the exclusion will last and then select the Resource to exclude. The User can enter any notes regarding the exclusion in the Notes field. If the requirement exists in the system, the Resource will also need to provide certificate as proof of their Pre-Qualification. This can be done ticking the "Use Pre-Qualification Documents" and adding the documents from here. It is actually possible to set more than one Resource as PQQ excluded, just tick the appropriate Resource(s) from the list and click "OK" to add them.

Select Resource(s)

Source

Reference

Exclusion Valid To ☐ Use Pre-Qualification Documents

Notes

Bulk Select Select All Clear All Select All Filter Clear All Filter Select Not Filtered

| | Name | Number | Town | Internal/External |
|--------------------------|----------------------------------|-----------|-------------------|-------------------|
| <input type="checkbox"/> | Filter... | Filter... | Filter... | Filter... |
| <input type="checkbox"/> | AKOR BOUW BV | AKO100 | Rijssen | External HO |
| <input type="checkbox"/> | Cardinal Shopfitting & Systems | CAR101 | Shipley | External HO |
| <input type="checkbox"/> | Cullen Cleaning Limited (Europe) | CUL101 | Dublin | External HO |
| <input type="checkbox"/> | Standard Control Systems | STA100 | Dublin | External HO |
| <input type="checkbox"/> | Store Development | STO101 | Store Development | External HO |
| <input type="checkbox"/> | EFG | EFG100 | Haydock | External HO |
| <input type="checkbox"/> | WIND Signs | WIN102 | Leeds | External HO |

13 available items, 13 filtered items, 0 selected items

OK Cancel

- To edit a Resource exclusion, click "Edit" after selecting the Resource and enter the new details in the respective fields that appears. To delete a Resource from the PQQ Exclusion List, tick the box in the column "Deleted?" against the Resource that is to be removed.
- Once all the necessary changes have been made, click "OK" to apply them.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=148>