

Sourcing: Event Evaluation Quick Reference Guide (QRG)

Sourcing Event Evaluation (Overview)

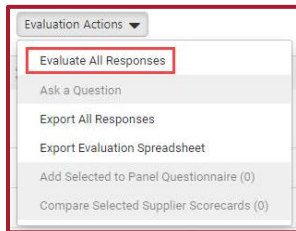
You may begin evaluating suppliers once you have supplier responses and any scoring and panel questionnaire responses to consider. Select specific or all suppliers to be included in an evaluation from the supplier responses page. You then navigate to a summary page of all the selected responses, also referred to as the Side by Side Evaluations page.

Event Owners and Evaluators can hide bid pricing from other users as needed by selecting the **Event Actions** drop-down list and choosing **hide pricing**. Users see the words **Event Prices Hidden** in place of prices, if selected.

Evaluate All or Selected Supplier Responses

You may select and run different scenarios on supplier responses to an event and save those scenarios for review by others before a final decision is made. The goal of this task is to perform different actions in evaluating responses on an event. You must have the Finalize Award Scenarios or Create Award Scenarios permission in order to navigate to evaluations.

1. Search for an event with a status of **Under Evaluation**. Select the **Sourcing** icon from the left Menu Bar on the Buy-to-Pay Homepage. Then, select **Sourcing Events** and **Search Events**.
2. Select **Evaluate all Responses** from the **Evaluation Actions** drop-down list on the **Supplier Responses** page. Or, you may select specific suppliers on the page, and select the link to **Evaluate Selected Responses**.



3. Click the **View Scenario** drop-down list and select from one of the common scenarios. View the results.

4. Click to **Reset** the page so you have no scenarios.
5. Select **Sort Bids** by various selections.
6. Note the **Cost Per Quality Point (CPQP)** score for each supplier if CPQP was configured for the event. You may choose to sort the responses by lowest CPQP score or view a scenario for Lowest CPQP score.
7. Note the **Best Value Score** for each supplier if Best Value scoring was configured for the event. You may sort the responses by highest Best Value Score or view a scenario for Highest Best Value Score.
8. Note the **Average Questionnaire Rating** for each supplier if a Panel Questionnaire was configured and the Questionnaire Close Date has passed.
9. Note the **Auto Score** and **Cost Analysis** information if configured for event or event line items. You may see the individual question score and cost adjustments when expanding the question or item information.
10. Pick one of the suppliers and in the drop-down next to the supplier name, select to **Pin** it to move it to the beginning of the table. You can select to **Unpin**, if desired.
11. Expand the product or service line items and evaluate responses on individual items. Select the link for an item to view additional item details.
12. Expand question information and evaluate responses.
13. Select one or more product and/or service line items. Then, select the **Actions for Selected Items** drop-down and select one of the options.
 - a. The page refreshes with Pending Award noted for the supplier you selected for the items.
 - b. The **Award Scenario** column displays the name of the supplier awarded for the items.
 - c. The **Scenario Breakdown** tab now shows, where you can see the results of this scenario.
14. Click the **Save As...** button and enter a name for the scenario you just created.

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Evaluate All or Selected Supplier Responses (continued)

15. You may select to **Export** the scenario, or **All Responses**.
16. Click **Finalize Award** when satisfied with the scenario.

Review Panel Questionnaire Responses

An evaluator may review panelist responses at the point the panelists begin entering those responses. Once the panel questionnaire closes, the evaluator can view average score information as well as the individual panelist responses.

Additionally, the **Panel Questionnaire Details** tab provides a detailed view of panel questionnaire ratings and results. The tab is only exposed after the panel questionnaire questions have closed and associated values are calculated.

Clicking the Export button also provides access to an Excel spreadsheet export of the questionnaire results to allow further analysis of the data outside of the system.

The goal of this task is to provide review panelist responses to a Panel Questionnaire for a sourcing event. It is assumed the user is an evaluator for the event and the panel questionnaire has closed.

1. Navigate to an event that is **Under Evaluation** and for which the **Questionnaire Close Date** has passed.
2. Select the **Panelists** page from the **Panel Questionnaire** section of event navigation.
 - a. Select the button to **View Panelist Response** for each panelist response you want to review.

The screenshot shows a sidebar menu for an RFP titled "RFP for Elevator Maintenance" with ID "RFP-00059-2019". The menu items are: Type: Request for Proposal, Event Status: Under Evaluation, Settings and Content (with a right arrow), Evaluations (with a right arrow), Panel Questionnaire (with a down arrow), Setup (with a checkmark), **Panelists** (highlighted with a red box and a "0" in a circle), and Panel Questions (with a "0" in a circle).

- b. Scroll through the panelist score and comments for each question. Use the pagination within the questionnaire pages to see all suppliers and questions rated.

Expand and collapse questions, pages and groups as needed.

- c. Select **Back to Event** to return to the **Panelists** page and select another panelist response to review.

3. Select the **Suppliers** page from the **Panel Questionnaire** section of event navigation. Note the **Average Rating from Submitted Panelists**.
4. Select the **Supplier Responses** page of the **Evaluation** section of event navigation.

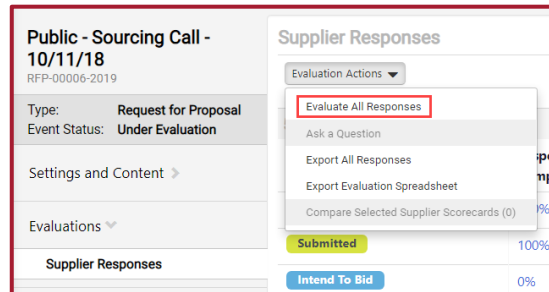
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View Evaluations Page

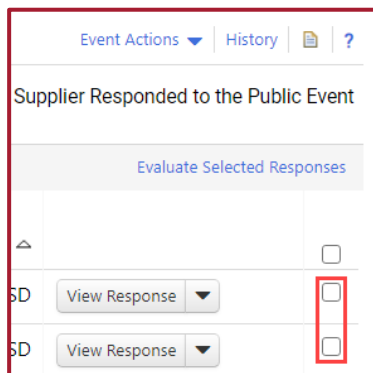
You may begin the evaluations process when an event is closed.

Note: You will see the word **Confidential** anywhere a price would be displayed if **Confidential Pricing** is enabled for an event and you are **not** included in the **Event Price Viewers** access group for the event. This includes PDF and evaluation exports you perform.

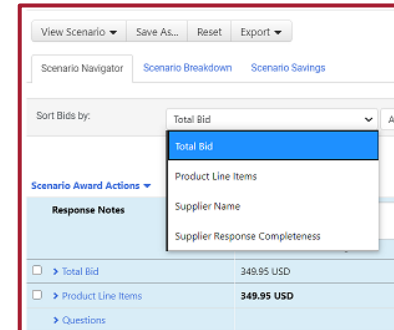
1. Search for an Event with a status of **Under Evaluation**.
2. Select the appropriate event you would like to evaluate to open the event details.
3. Select the **Supplier Responses** page for the event.
4. Select **Evaluate All Responses** from the **Evaluations Actions** drop-down list.



Or, select specific supplier responses, and select **Evaluate Selected Responses** from the **Evaluations Actions** drop-down list (drop-down shown above).



5. Click the **View Scenario** drop-down list and select from one of the common scenarios. View results.
6. Select to **Sort Bids** by various selections.



7. Expand the product or service line items to see individual items.
8. Select **See full comment** hyperlink to see the complete text, if comments are present.
9. Select the **Back to Event** hyperlink if you would like to return to the event to see other details of the supplier's response.

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Evaluate Suppliers by Exporting All Event Responses

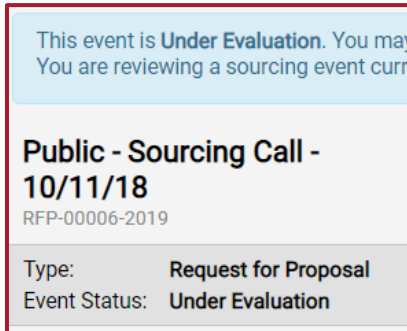
You may choose to export all responses to an Excel file for further analysis when evaluating responses.

Note: You will see the word **Confidential** anywhere a price would be displayed if **Confidential Pricing** is enabled for an event and you are **not** included in the **Event Price Viewers** access group for the event. This includes PDF and evaluation exports you perform.

Conditionality between fields is not included when additional item fields on a sourcing event are included in the **Evaluation Actions** → **Export All Responses** document.

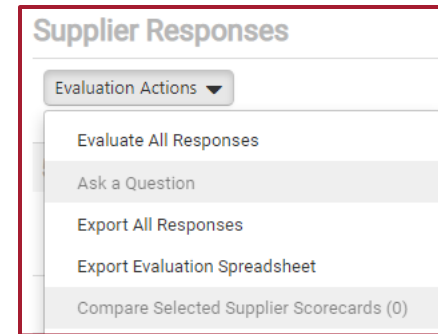
The goal of this task is to export all the submitted supplier responses for an event. You must have the Finalize Award Scenarios or Create Award Scenarios permission in order to navigate to evaluations.

1. Search for an event with a status of **Under Evaluation**.



2. Select the appropriate event you would like to evaluate to open the event details.
3. Select the **Supplier Responses** page for the event.

4. Select **Export All Responses (see below)** from the **Evaluations Actions** drop-down list. Proceed to step 6.



5. Select **Evaluate All Responses (see above)** from the **Evaluations Actions** drop-down list to export from the **Evaluations** page.

Alternatively, select the checkboxes next to the specific suppliers you want to evaluate. Then, select **Evaluate Selected Responses** from the **Evaluation Actions** drop-down list.

6. Select the **Export** button and **Export All Responses** or **Export Selected Responses**. The **Evaluation Export** window opens.
7. Enter a **Description** for the **Export** file and click **Submit**. A confirmation indicates your export request has been submitted.
8. Click the hyperlink message to navigate to the **Sourcing** → **Sourcing Events** → **View Exports** → **Evaluations** page. Select the file name to open in Excel.

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Tag Suppliers for the Next Stage

Suppose you have sent out an RFI, reviewed the responses, and decided you're interested in some – but not all – of the suppliers? You can tag specific suppliers for selection to the next stage of bidding. For example, you may need bids for consulting services and want to ask them additional questions or provide them with additional information.

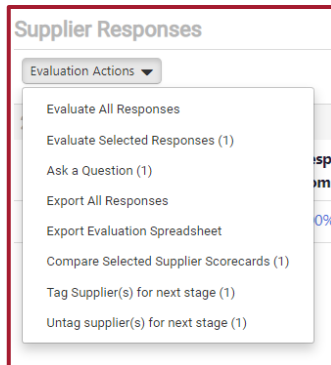
Please Note: Be certain that you are willing to consider the bids of all suppliers you are inviting to the next stage. Only suppliers selected for the next stage are eligible to be awarded the bid. All other suppliers are disqualified.

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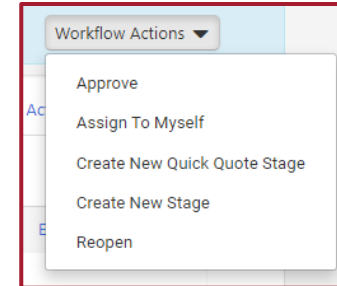
| Under Evaluation | | Public - Sourcing Call - 10/11/18 | | | |
|----------------------|---------|-----------------------------------|------------------|---|--|
| RFP-00006-2019 | Created | 10/11/2018 12:52 PM EDT | Submitted Bids | 2 | |
| Request for Proposal | Release | - | Intending to Bid | 3 | |
| | Open | 10/11/2018 12:00 AM EDT | No bids | 0 | |
| | Close | 10/26/2018 12:00 AM EDT | | | |

2. Select **Sourcing Events** and **Search Events**. Then, select the desired event by clicking the event name hyperlink.
3. Select the checkboxes next to the suppliers you want to Tag for the next stage.
4. Select **Tag Supplier(s) for next stage** from the **Evaluation Actions** drop-down list.

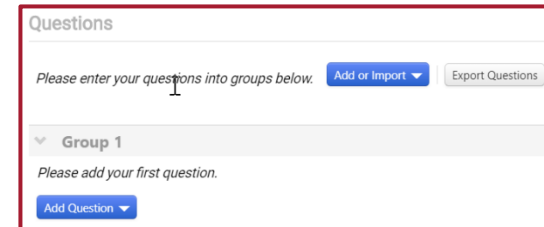


A green **Success** message appears at the top of the page. In addition, a **Thumbs Up** icon appears next to each **Supplier Name**.

5. Select **Create New Stage** from the **Workflow Actions** drop-down list.



6. Enter a description in the **Stage Description** section if the event has multiple stages and click **Next**.
7. Click the **Questions** tab to add questions for the suppliers to answer.



You can enter them manually using the **Add Question** button or you can **Add or import** a **Question Page**, **Question Group**, or **individual questions** from the library. Questions can be edited to be optional or required.

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Tag Suppliers for the Next Stage (continued)

8. Click the **Items** tab to add **Product Line** or **Service Line** items. Select each sub-tab as needed. Examples could be Material for a new classroom or Installation of materials for classroom, respectively. Be sure to add a description, quantity, etc.
9. Click **Suppliers** to add an existing supplier or contact. You can invite a supplier manually to bid prior to onboarding in the **Add Suppliers to Event** subtab. Onboarding can be completed if the event is awarded to this supplier.
10. Click the **Submit for Approval** button in the **Review and Submit** tab. The event has been created and submitted for approval. It remains in Draft status until the **Release Date** and time arrives (as set in Step 8).
11. Additional details may be added. For example, the **Q & A Board** tab allows users to post questions and answers, while allowing suppliers to ask questions.

Once posted, the event owner will receive an email with the question. They can answer and post it to the Public Q&A or reply directly to the one supplier.