360 Buyers' Portal
User Guide 20

Evaluating Tenders

Assessing Providers' Responses

This user guide describes steps involved to complete a tender evaluation.

Note: The job manager can restrict certain evaluators to certain sections (e.g. one user may have been selected to evaluate the technical responses and another evaluator only reviews the financial/pricing responses).

This guide is an add-on to the vfmtest.com suite's searchable help documentation. See:
https://simplylogical.atlassian.net/servicedesk/customer/portal/2?q=

Before evaluations can begin

1. The boss will need to create users with the evaluator permission
2. The job manager will need to assign evaluators to the job

Start an evaluation

1. Log-in to the 360 **Buyers' Portal**
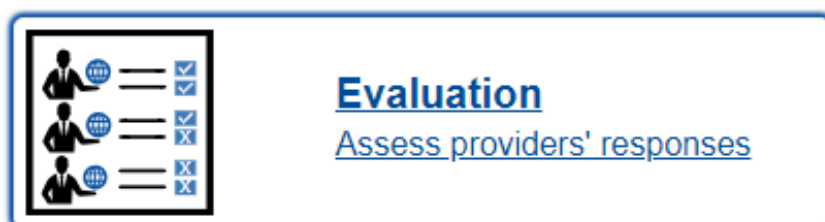2. Navigate to the **Evaluation** page

Figure 1: Evaluations Navigation Tile

3. Select the job to evaluate
   Note: Only closed jobs will be listed

Job Name	Release Date	Closing Date
Example Schedule of Rates	8-Oct-2018	8-Oct-2018
Signature of Rates Test	21-Aug-2018	21-Aug-2018

Figure 2: Evaluation Jobs List

4. If asked, review the list of respondents and agree that you have no conflict of interest
   IF YOU HAVE A CONFLICT OF INTEREST THE JOB MANAGER MUST DECIDE WHETHER YOU ARE ELIGIBLE TO CONTINUE TO PARTICIPATE IN THE ASSESSMENT PROCESS
   If in doubt, click **Cancel** and ask the job manager for advice
5. Choose the way you would like to assess the providers' responses – either:
   - **One Provider at a Time**
     One provider's response to each question will be displayed section-by-section
   - **One Question at a Time**
     All providers' responses to each question will be displayed at the same time

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Figure 3: Evaluation Info Page (displaying the job "Example Schedule of Rates")

Note: Every question for every provider will need a score. To check progress:

6. Click **How much more needs evaluating?** to download a report that lists all the responses that need to be scored and/or commented on

One provider at a time

1. Click **One Provider at a Time**
2. Optionally, **Search** for a provider
3. Click on a provider's name
   The first response available for the selected provider will be displayed
4. Either:
   - Click **Next** until a question requiring a score is displayed
   - Click on a section header to jump to a specific question

Figure 4: Section Headers

5. Enter a **Score** and a **Comment**
6. Click **Next** to save and continue (or click **Save** to stay on the same page)

Figure 5: Response Assessment

One question at a time

1. Click **One Question at a Time**
2. Use **Ctrl + Click** to select the providers to evaluate simultaneously
3. Select a section and a question to evaluate
4. Enter a **Score** and a **Comment** for each provider
5. Click **Save**

Assessments

Each row in the assessment tables (see Figure 5: Response Assessment) displays:

- **Switch**

  Switch between **One Provider at a Time** and **One Question at a Time** (and vice-versa)

- **Question(s)**

  The question text (displayed to the providers when the tender was open) with additional information, if specified, accessible via a pop-up

- **Response**

  The provider's compliance statement (in response to the question) which, if extra details were provided, is displayed as a link

  Click the link to display more details entered by the provider via a pop-up

- **Score**

  Select a score as per the evaluation instructions. If available, the instructions are accessible via a pop-up

  Note: If the instructions are formatted as a number list, the text can be copied into the **Comment** with a simple click

- **Comment**

  Enter a comment to justify the score

  Note: The comments *may* be mandatory – it's a system setting

- **Tags**

  Use tags to highlight assessments with simple and standard terms

- **Risk**

  Use the risk matrix to provide a risk assessment that will affect the provider's overall value for money ranking. To add a risk assessment:
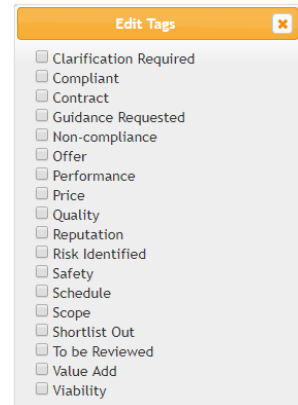
  1. Enter a **Description**
  2. Select a **Context** (using the icons' tool-tips for a description of each option)
  3. Select a **Matrix Cell**
  4. Click **OK**

  BE CONSISTENT WITH YOUR RISK ASSESSMENTS!

  IF YOU ADD A RISK ASSESSMENT FOR ONE PROVIDER, YOU SHOULD ADD ONE FOR ALL PROVIDERS

Figure 6: Edit Tags

One more thing

Evaluation comments may be given to providers during a tender debriefing

Be clear, objective, and justified in your assessments!

Figure 7: Risk Matrix