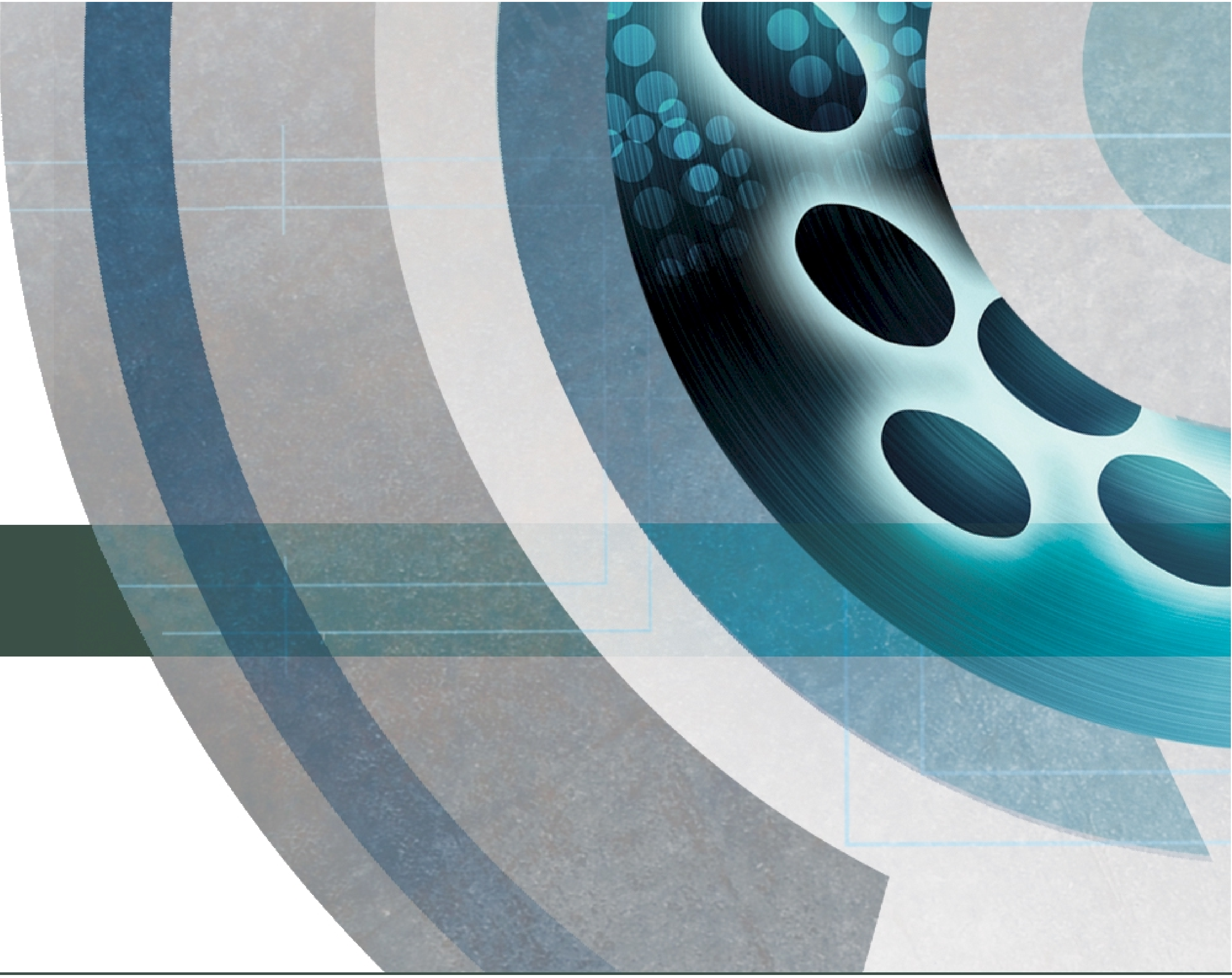


INTENDA

USER MANUAL

Panel Scoring

Version 1.4.4.0

Table of Contents

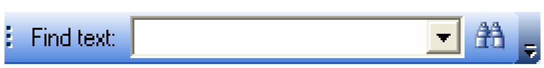
Introduction

The Panel Scoring application is an **Add-On** to the RFx system, providing authenticated external users the ability to capture point scorings against an evaluation category on a Tender. The evaluation category will be reserved as a percentage of the total tender evaluation and it's the percentage allocated that will be affected by the Panel Scoring application.

A panel of individuals may provide a non-related point allocation per supplier response, thereby affecting the eventual outcome of business distribution based on aspects other than that which was allocated on the published Tender. The organization publishing the Tender may want a percentage of the total evaluation to be provided by the answers given by suppliers, while the rest of the makeup is done by interpretation of internal role-players who evaluate the supplier responses, or aspects of the responses.

In other words, the organization who published the Tender, may allocate points themselves to captured responses by suppliers in the Panel Scoring application. Multiple individuals may capture their point allocation for an evaluation criterion in the tender template. These points per supplier are affected by the external parties rating a specific supplier.

Definitions

Term	Definition
Tender template	A tender template consists out of a tender header, tender detail, participants and possible answers. This template is then linked to an evaluation criterion of a tender.
RFx	System used to create tenders, contracts and amendments which will then be awarded and evaluated. A template created in the Panel Scoring Application will be linked to an evaluation criterion of a tender in RFx.
Search in a grid	The search functionality will be available where records are listed in a grid.  *Figure: Find functionality in a grid* The search is done against the text provided in the text field and the column selected. To start the search, select the *Find* icon.

Icons used throughout the system:

Icon	Description
	Maintain Potential Answers
	Template Header and Details
	Template users
	Assign Tender
	Tender Detail
	Scoring
	Integrate to RFx
	User Maintenance
	Change Password
	Link Potential Answers to evaluation criteria (CTRL + E)
	View linked evaluation Criteria (CTRL + V)
	Find again
	Add a ……….. (CTRL + A)
	Edit a ……….. (CTRL + A)
	Remove a ……….. (CTRL + D)
	Sort the records descending
	Sort the records ascending
	Move to the next record (CTRL + N)
	Move to the previous record (CTRL + P)
	Exit Application
	Help
	What is new
	Known Issues
	Save
	Undo
	Drop Down Error
>	Move one record to the right
>>	Move all the records to the right
<	Move one record to the left
<<	Move all the records to the left

Opening the Panel Scoring Module

As illustrated in the figure below Panel Scoring (PS) is accessed via the Intenda Solution Suite (ISS) icon displayed on your desktop. By selecting this icon you will be allowed access to the Intenda Solution Suite Dashboard.

Figure: Your desktop

The Intenda Solution Suite logon screen will be displayed.

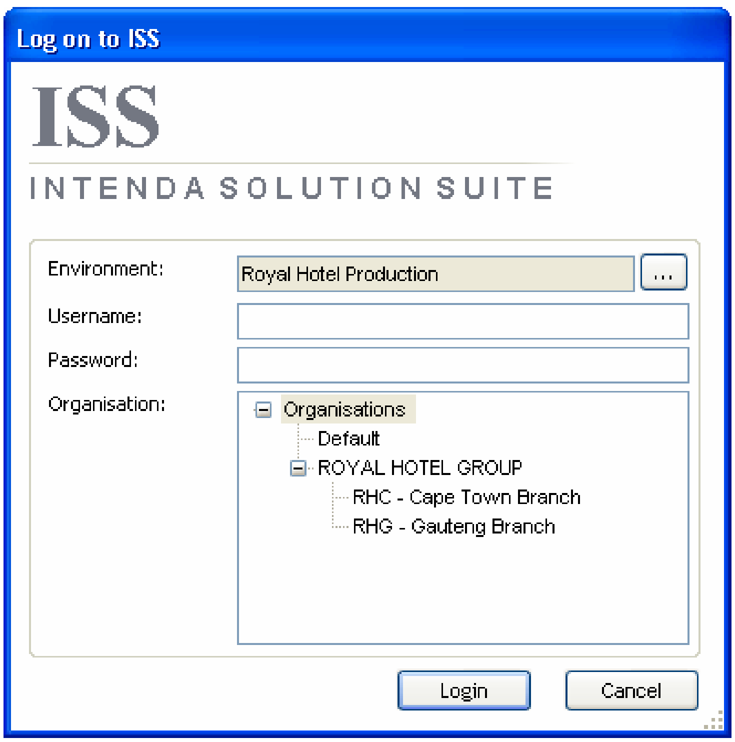


Figure: Log into ISS

To log into the ISS dashboard, simply select the Organisation that you belong to, and complete your username and password in the relevant field. Once you are satisfied, select the Login button. You will then be redirected to the ISS dashboard.

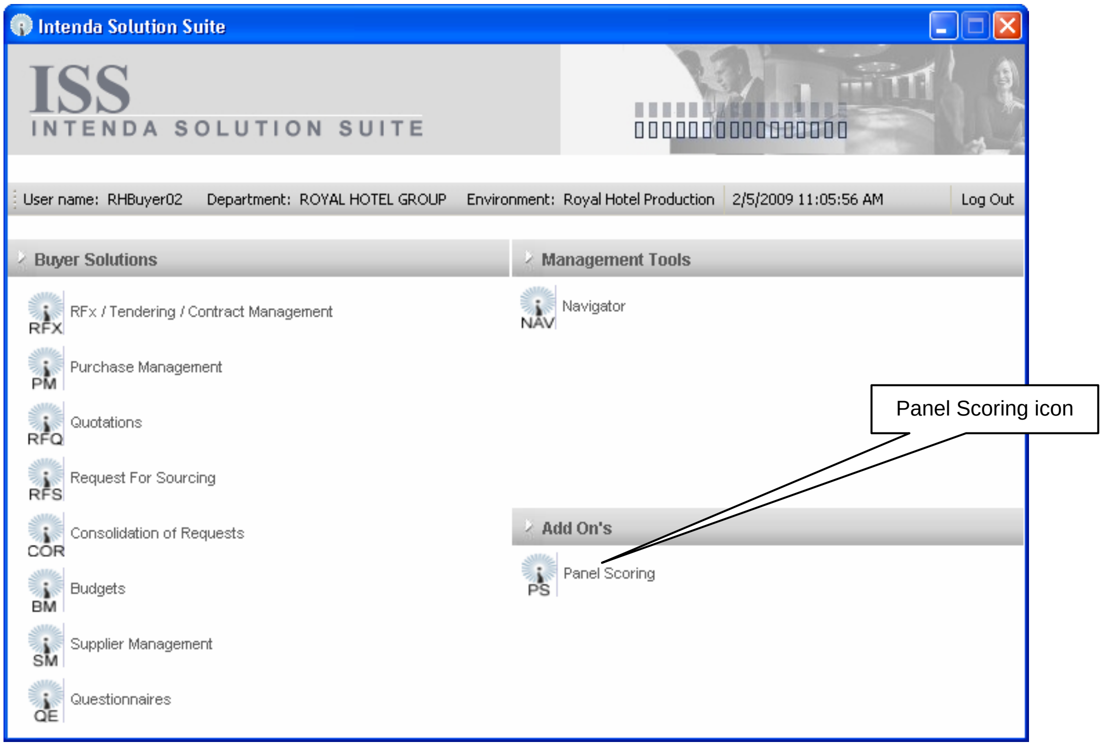
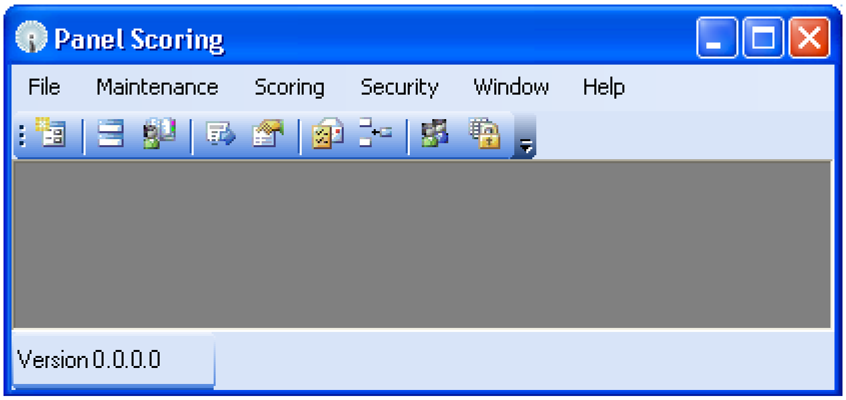


Figure: ISS Dashboard

To access the PS Module, simply select the PS icon on the dashboard.

Once you have accessed the PS system, the PS main form will be displayed as follows:



User access

User accounts are managed within the system and a distinction is made between administrators and participants, who are normal account users.

Administrators have the ability to manage the participant accounts, making changes or activating / de-activating the accounts. Only administrators are allowed to make changes to templates that have been created. To access this form, select the (User Maintenance) icon from the main menu.

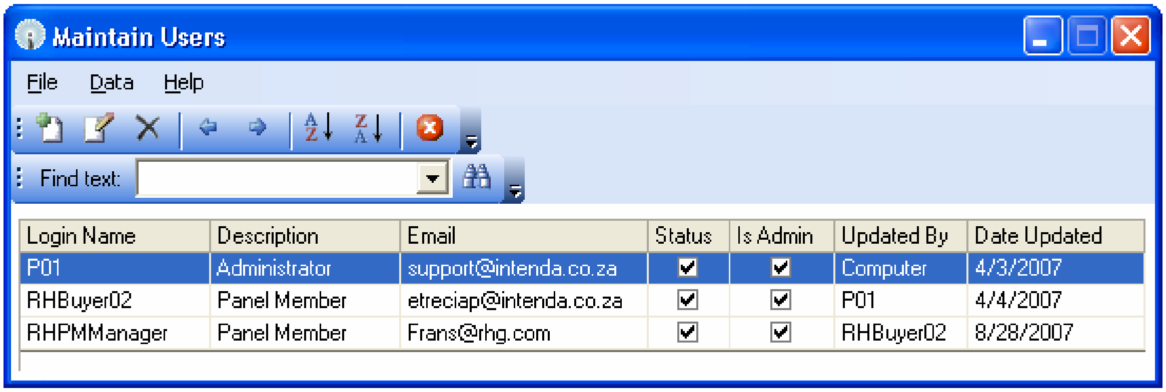


Figure: Maintain users

Method: Adding a user

- Select the (Add) icon.
- The *Add a New User* form is displayed:

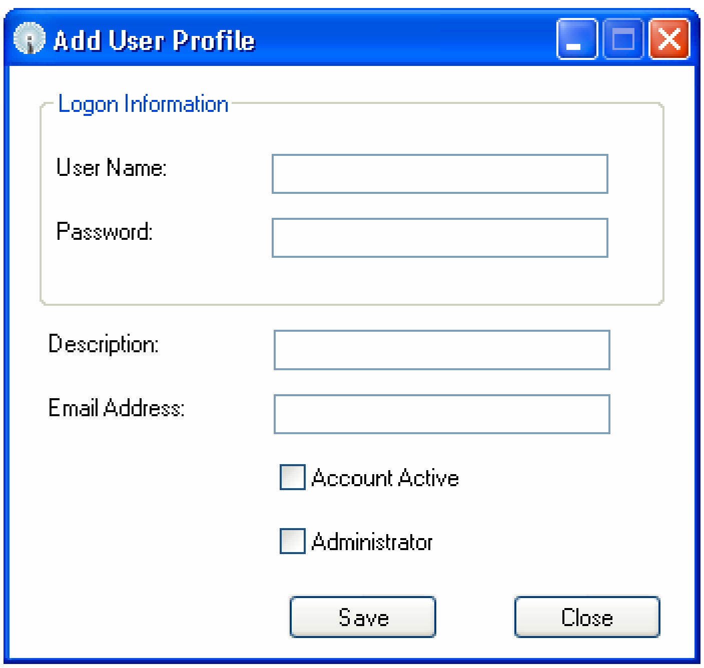


Figure: Add user profile

- The following fields are listed:

Field	Description
User name:	A login specification.
Password:	A login specification.
Description:	Description of the user.
Email Address:	Email address of the newly registered user.
Account Active:	If selected, the user will be able to access the system with this specific login details.
Administrator:	If selected, the user profile will be an administrative one.

- After providing the profile details of the user, select the SAVE button.
- To exit the form without saving, select the CLOSE button.

Method: Editing a user account

- Select the user you wish to edit from the grid as displayed above.
- Select the (Edit) icon on the menu bar.
- The logon information of the selected user is displayed.

Disabling a participant account ensures that the relevant participant cannot log into the system. Deleting a user will remove it from the system. To deactivate a user, deselect the *Active User* checkbox. To configure a user as an administrator, make sure that the *Administrator* checkbox is selected.

- When you are satisfied with the changes made, select the UPDATE button to save it.
- To exit without saving, select the CLOSE button.

Method: Removing a user from the system

- Select the user from the grid you wish to remove.
- Select the (Delete) icon.
- A message confirming the removal of the user will be displayed; select YES to continue with deletion.

The specific user will now be removed from the system.

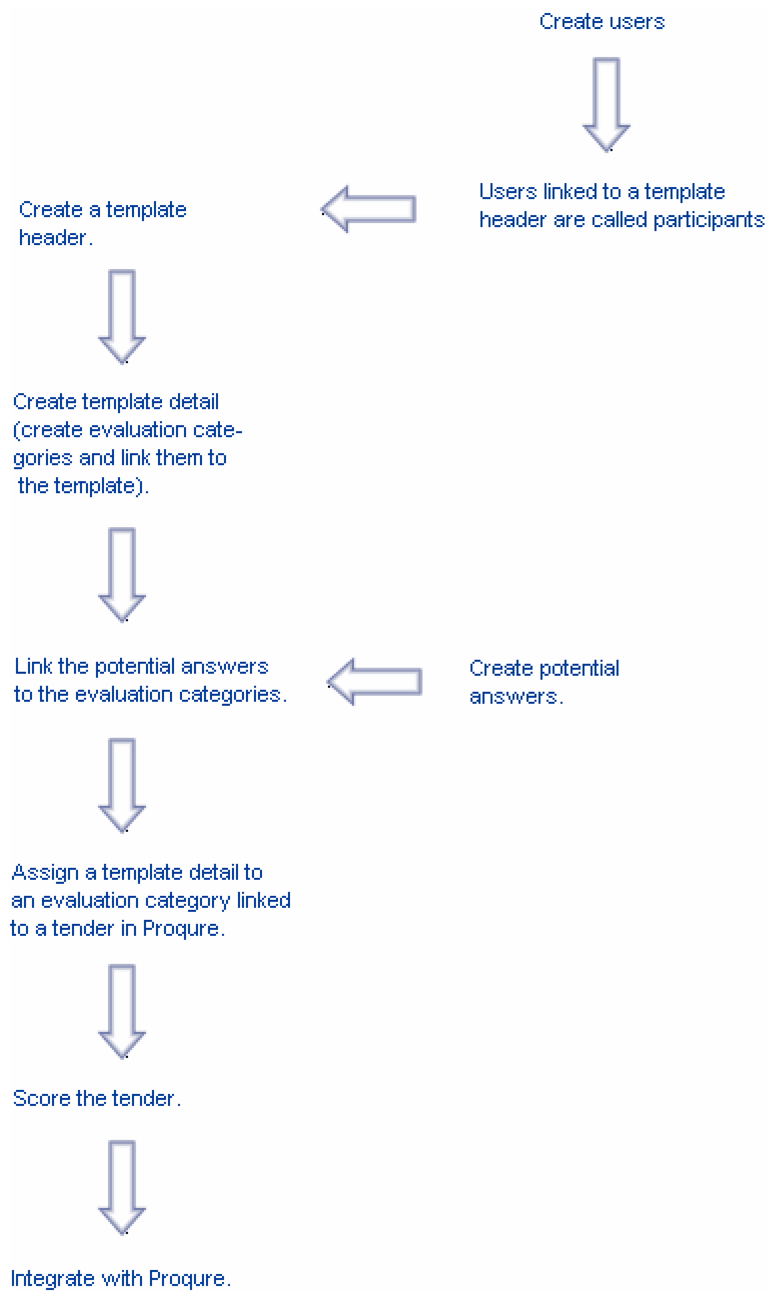
Resetting password

Resetting a participant password allows the administrator to reset the password. Each user has the ability to change his / her password thereby placing you in control of your own logon profile.

To reset your password, select the (Change Password) icon which is embedded in the menu at the top. Provide your current password and the new one and select the SAVE button.

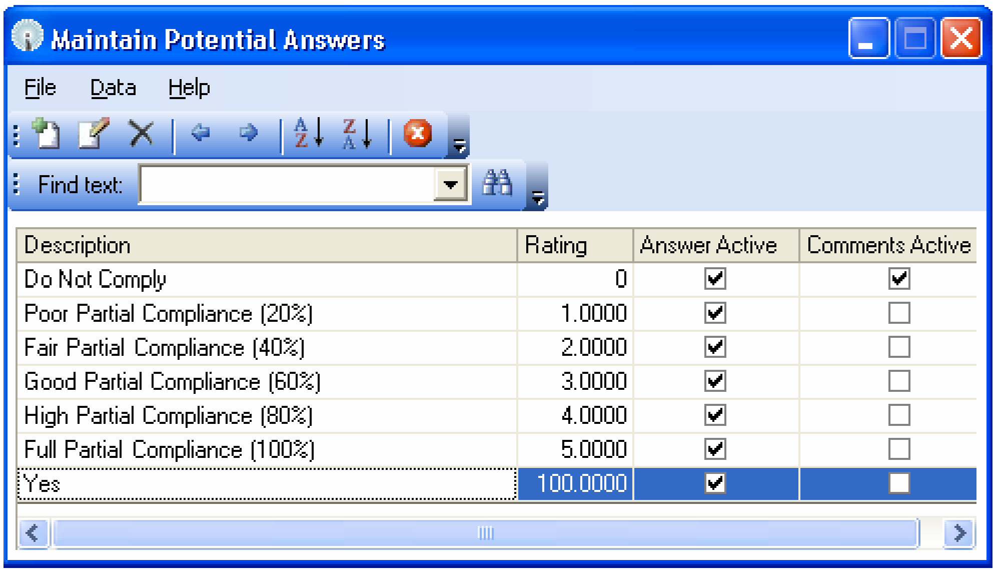
Process flow

The process flow consists out of a few sections; the first section concerns itself with providing user access to the system, the second with creating a template, the third section with assigning a template to an evaluation criterion linked to a tender, the fourth section is the scoring of a tender and the last section relates to the integration of a scored tender with RFx.



Potential answers

Adding a potential answer allows you to create a new answer and manage the newly created potential answer. When adding the potential answer, a description, default rating, comments indicator and active status must be configured. To access this form, select the (Maintain Potential Answers) icon from the menu.



Description	Rating	Answer Active	Comments Active
Do Not Comply	0	☑	☑
Poor Partial Compliance (20%)	1.0000	☑	☐
Fair Partial Compliance (40%)	2.0000	☑	☐
Good Partial Compliance (60%)	3.0000	☑	☐
High Partial Compliance (80%)	4.0000	☑	☐
Full Partial Compliance (100%)	5.0000	☑	☐
Yes	100.0000	☑	☐

Figure: Maintain your potential answers.

Method: Add a potential answer

- Select the (Add) icon to open the *Add Potential Answers* form.
- Provide a description, default rating, whether the answer is active and whether the comments are active. An answer that is not indicated as active by selecting the Answer Active checkbox will not be picked up in the system. If comments must be mandatory, make sure that the *Comments Active* checkbox has been checked.

Editing a potential answer allows a user to make changes to the master record of the answer. The changes that can be made to an answer are the description, default rating, comments indicator and active status.

Method: Edit a potential answer

- Select the potential answer from the grid on the *Edit Potential Answers* form you wish to edit.
- Click the (Edit) icon to display the editable details of the potential answer.
- After making the necessary changes, select the *Save* button or to exit without saving, select the (Close) icon.

Deleting a potential answer allows the user to remove a potential answer that is no longer valid. If a potential answer has been linked to a template or used on a tender, it cannot be deleted as this will remove the history of the item.

Method: Remove a potential answer

- On the *Maintain Potential Answers* form, select the potential answer you wish to delete.
- Click on the X (Delete) icon and the record will be removed instantly.

Creating a template

Because a specific template may be assigned to multiple tenders, a template allows you to predefine a structure that can be linked to tenders. The same group of participants may evaluate different tenders in the same way where they belong to the same business unit or commodity grouping. For this reason a template ensures that the user does not need to re-create the structure whenever a tender needs to be evaluated.

A template consists out of the following;

1. a template header
2. a template detail
3. potential answers
4. participants who do the scoring

Template header

A template header defines the high level information relevant to the template. You will assign a template to a tender, based on the displayed template header information. Information captured on this level is the template code, template description, date created and whether the template is active or not.

To access the *Maintain Template Header* form, select the (Template Header and Detail) icon to open the following form:

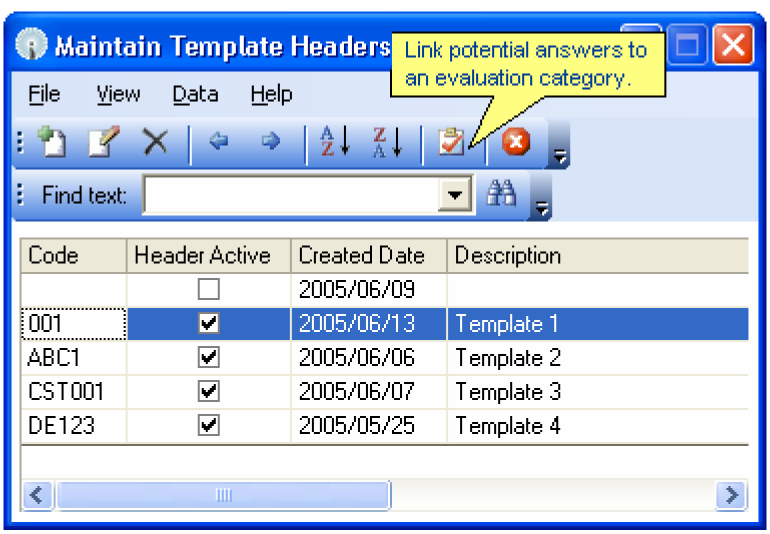


Figure: Maintain template headers

Method: Adding a template header

- Select the (Add Template Header) icon and the *Add Template Header* form displays;
- The following fields of the header must be captured;

Field	Description
Header code:	The header code is unique and the system will reject any attempt to add a duplicate.
Description:	Provide an explanatory description of the template.
Date created:	The system logs the date and time automatically upon creation of a new template header.
Header active:	An inactive Header will not be listed where Headers could be selected.

- After providing the necessary information, select the SAVE button.
- To exit the form without saving anything, select the CLOSE button.

Method: Editing a template header

- Select the template header from the list you wish to edit.
- Then select the (Edit Header) icon to display the Edit Header form.
- After making the necessary changes, select the UPDATE button.
- To exit the form without saving, select the CLOSE button.

Method: Removing a template header

- Select the template header you wish to remove.
- Then select the (Delete) icon and it will be removed.

Template Participants

Template participants are users linked to a template. When a template is assigned to a tender the linked participants would already be assigned. Only participants linked can capture their scoring for a particular tender. To access this form, select the (Template Users) icon.

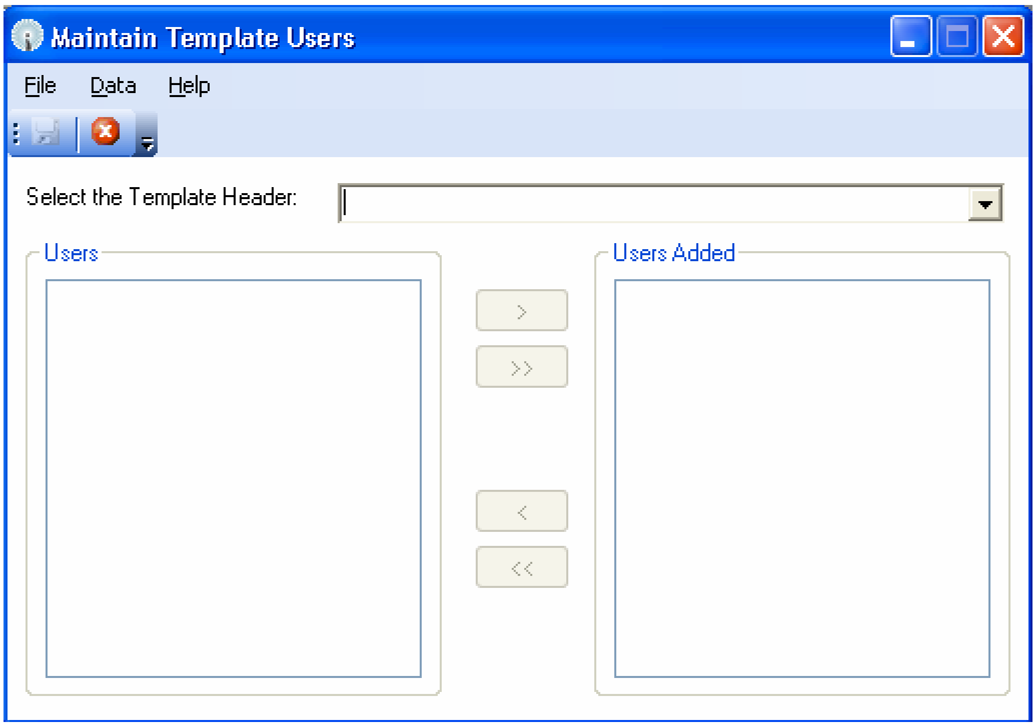


Figure: Adding users as participants to the template.

Method: Adding users to the template

- The templates available are listed in the dropdown box as illustrated in the image above. Select the template you wish to add users to.
- The form consists out of a *Users* section and a *Users Added* section. Users listed in the *Users Added* section are linked to the template. Select the user(s) listed in the *Users* section and then select the "move user to the *Added Users* section" > button.
- The selected user(s) is then added to the template. To save them to the selected template, select the (Save) icon.
- To exit the form, select the (Close) icon.

These users linked to the template are referred to as participants. To remove users from the template, select the user listed under the *Users Added* section and then click the < button. The selected user is then moved to the *Users* section.

Template Detail

The template detail is the breakdown structure whereby you will respond to the tender. The template detail can be multi-levelled, thereby allowing for a parent child relationship.

It may be necessary for the administrator of a template to sub-divide the template into areas which the participants understand. When entering their scoring for tenders, users will do it for their respective categories, which can fall on the following level of a hierarchy.

If you refer back to the process flow, the template detail must be added to the template header, and then potential answers may be linked to the selected evaluation criteria. Make sure that you are on the *Template Header* form, since you have to select a header to add template detail to. You must first create a template detail to link to the template header.

Method: Linking potential answers to an evaluation criterion

- Select the template header listed in the grid you wish to add detail to on the *Template Header* form.
- Then select the (Link Potential Answers to Evaluation Criteria) icon. The maintenance form of the template detail is displayed as illustrated below;

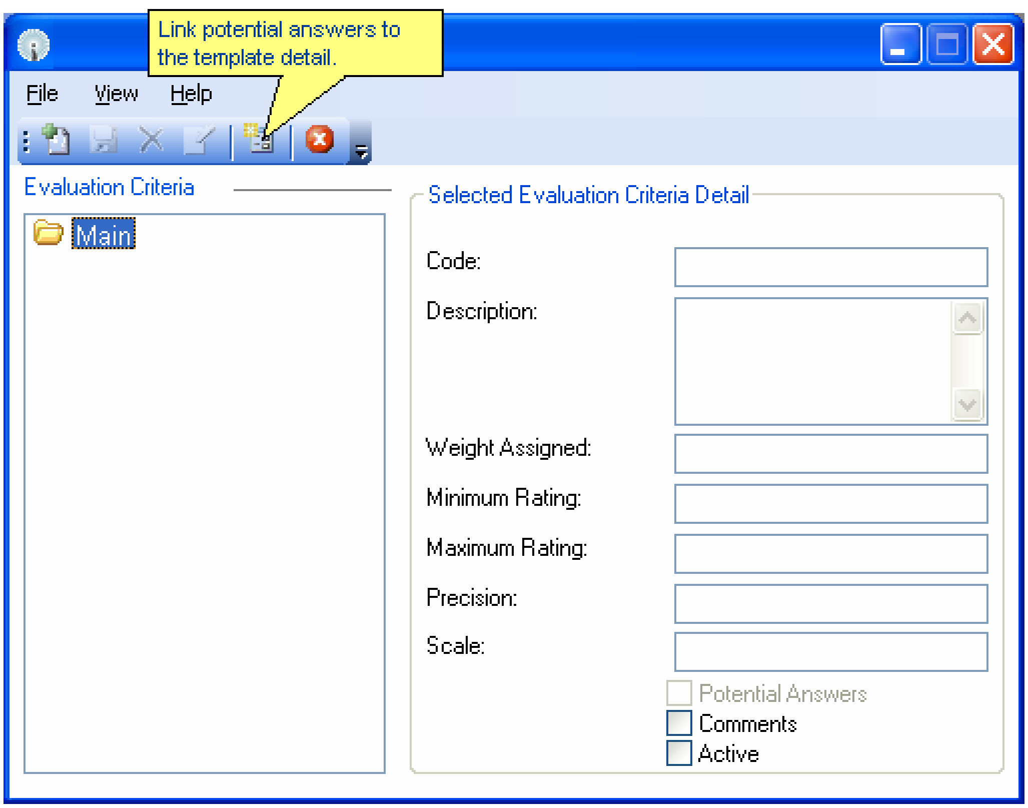


Figure: template detail maintenance.

- To add a new template header, select the (*Add)* icon and the *Selected Evaluation Criteria Detail* fields become editable.
- Provide the required information in the fields and the select the (Save) icon to add the *Template Detail* to the hierarchy. Make sure that the *Active* checkbox has been selected, otherwise the evaluation category would be inactive.

Fields defined

Field	Description
Precision	Specifies the number of digits (the length) of the numeric value, for example, the length of two would have a maximum of 99 if the maximum or minimum weren't specified. Note that this includes the digits after the comma.
Scale	Specifies the length of the numeric value after the comma, for example the scale of 2 would allow for the maximum of 99 after the comma (i.e. 0, 99).
Maximum	The maximum value of the numeric entry is specified, for example 45.
Minimum	The minimum value of the numeric entry is stipulated for example 10.

From the above examples, the following criteria have been set down; the precision should be 4 (to allow 2 digits before and 2 after the comma), with a value not exceeding 45, and not less than 10.

PLEASE NOTE The weights of the evaluation categories you've added must be 100 in total in the hierarchy. A warning message will be displayed if the weights don't add up to 100 when you try to save. Only the weights of the active evaluation criteria will be taken into account.

Method: Editing an evaluation criterion

Make sure that you are on the *Maintain Template Detail* form, which can be accessed from the *Maintain Template Header* form.

- Select from the hierarchy on the left the evaluation criterion you wish to edit.
- To edit the evaluation criterion details, select the (Edit) icon.
- The editable fields of the evaluation criteria will be displayed on the right of the form.
- After making the necessary changes, select the (Save) icon.

Method: Removing an evaluation criterion
Make sure that you are on the Template Detail form, which can be accessed from the *Template Header* form.

- Select from the hierarchy on the left the evaluation criterion you wish to edit.
- To remove the evaluation criterion from the hierarchy, select the (*Delete)* icon and the evaluation criteria will be removed.

Linking Potential answers to your template detail

Template answers may be assigned to a template level. For potential answers to be linked to the template the detail code must be activated for potential answers and the potential answer indicator must also be assigned. Multiple potential answers may be assigned to a single detail code.

Where answers are linked, the default rating is taken from the potential answer selected, but you still have the full ability to change the default rating assigned.

To link potential answers, you have to select an evaluation criterion from a template detail.

Method: Linking potential answers

- Select the evaluation criterion you wish to link the answers to on the *Template Detail* form.
- Select the (Link Your Potential Answers*)* icon to open the *Link Potential Answers* form.

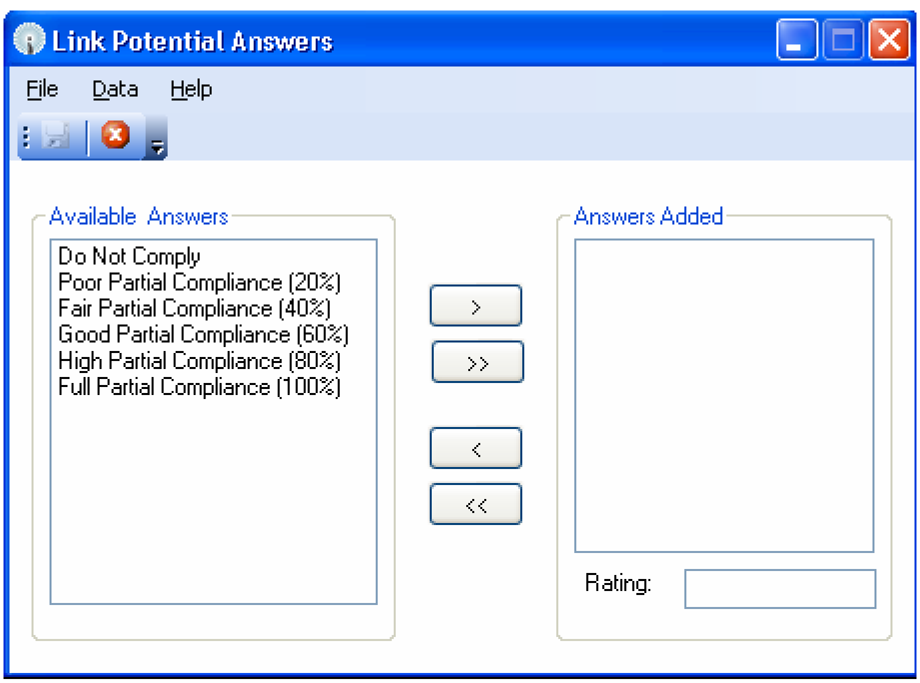


Figure: Link Potential Answers

- The *Link Potential Answers* form consists out of the *Available Answers* section and the *Answers Added* section.
- To add answers listed in the *Available Answers* section, select the answer to be added and then the "move to right" > button. The selected answer will then be moved to the *Answers Added* section.
- Select the (Save) icon.
- To close the form, select the (*Close)* icon.

Assign a tender to a template

This is the process whereby a template can be linked to a tender created in RFx, but can still be manipulated before capturing the participant answers. This means that a template assigned to a tender can still be changed, by taking detail items away or adding additional ones that were not present on the original template. Only administrators of this specific profile have the option of maintaining a template assigned to a tender.

PLEASE NOTE If the user is not an administrator they are not allowed to perform any maintenance at this level.

For assigning a template to a tender number, the tender in RFx must be in a closed status. Tenders with other statuses will not be listed under *Tender Detail* on the *Assign Template* form.

Assigning a template to a tender can be done easily, by assigning it to an evaluation category residing on the selected tender. Only evaluation categories that have the '*Link to Price Indicator'* option activated in RFx will be displayed.

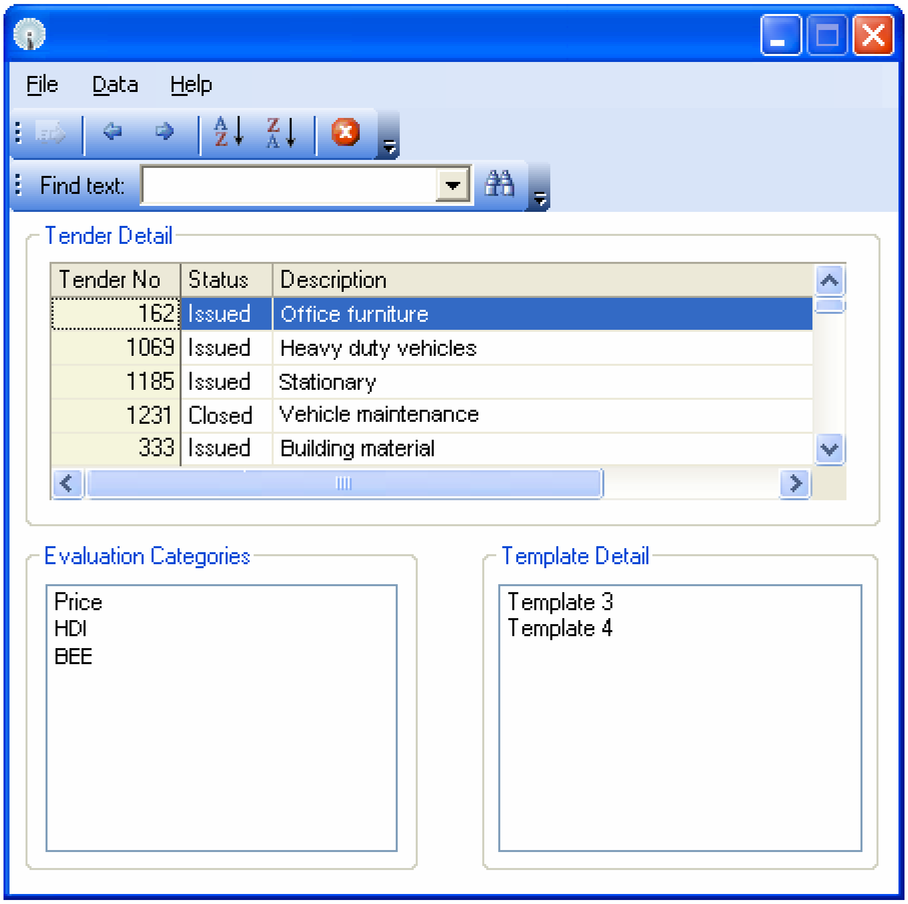


Figure: Assign a tender to a template.

Method: assigning a tender to a template;

- The tenders created in RFx are listed in a grid under the heading *Tender Detail*.
- Select the (Assign Tender) icon. The *Assign Template* screen will display.
- Select the tender from the grid you wish to assign to a template.
- Select the evaluation category of the selected tender you wish to link the template to.
- The active templates are listed under the heading *Template Detail*. Select the template you wish to be linked to.
- The (Assign Tender) icon will become active. Select the (Assign Tender) icon to link your template to an evaluation category of a tender.
- To exit the form, select the (Close) icon.

Maintain tender template

Once a template detail has been linked to an evaluation category of a tender, it is referred to as a tender within the *Panel Scoring Application*. Maintenance of the potential answers, the participants and the evaluation criteria is done with ease on this form. To access this form, select the (Tender Detail) icon to open the tender maintenance form;

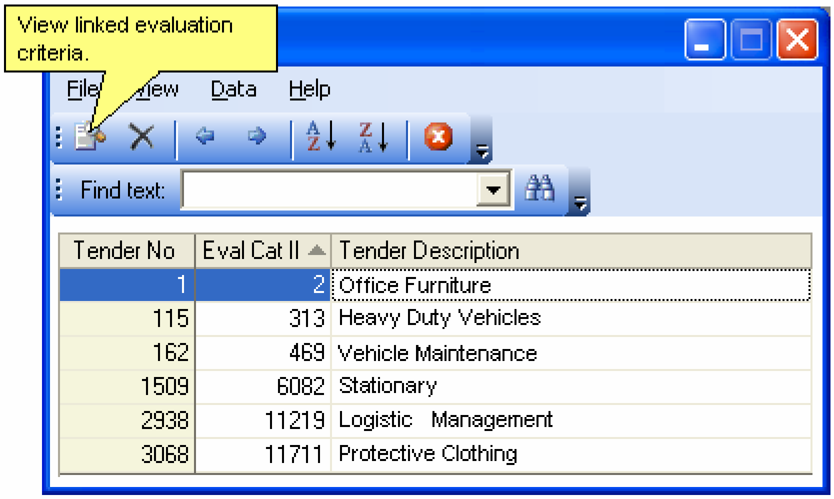


Figure: Select tender to maintain from the grid

For tender maintenance, you have to select the tender you wish to maintain and then the (*View Linked Evaluation Criteria)* icon to display the tender detail.

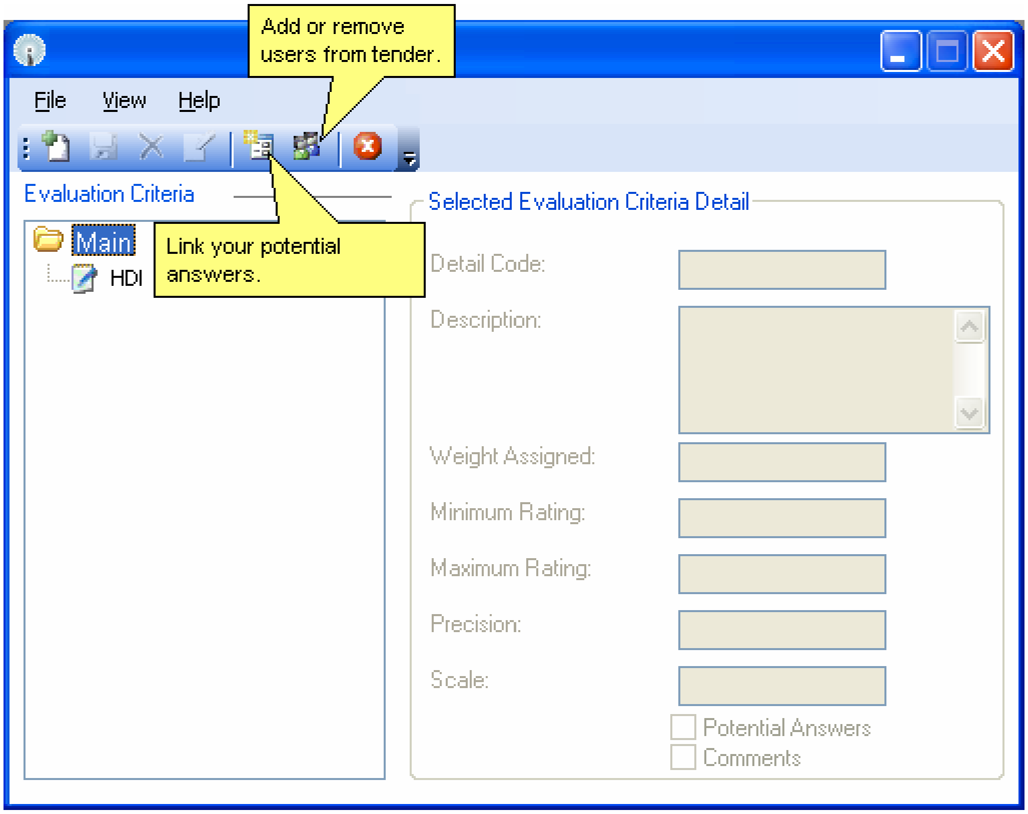


Figure: Maintain a tender

Evaluation criteria

You may add evaluation categories to the current hierarchy by selecting the (Add an Evaluation Criteria) icon. Select the evaluation criterion you wish to edit and then the (Edit) icon. The evaluation category's details will then be editable. To save the changes, select the (Save) icon.

Maintain participants of the selected tender

To add or remove participants from the tender, select the (Maintain Participants*)* icon. The *Maintain Participants form* is displayed. The form consists out of the *Users* section and the *Users Added* section. To add users to the tender, select a user listed in the *Users* section and then the "move user to the right" › button. Make sure that you've selected the (Save) icon after you've made the necessary changes.

Panel Scoring

The process of capturing the point allocation for a specific template detail option is called panel scoring. The prerequisites are that you must be logged in with the correct credentials which have been linked to the profile that has been assigned to a tender number. Each response captured must be done against a specific supplier by providing a percentage point allocation or selecting it from a list of potential answers. Whatever option is selected, the result will relate into a percentage apportionment for the detail option being scored.

Each participant that logs in has the ability to capture only their own point scoring, or selecting from the list of potential answers.

Method: Scoring a tender

- To score a tender, select the (Scoring) icon on the main menu. The following form as illustrated below is displayed;

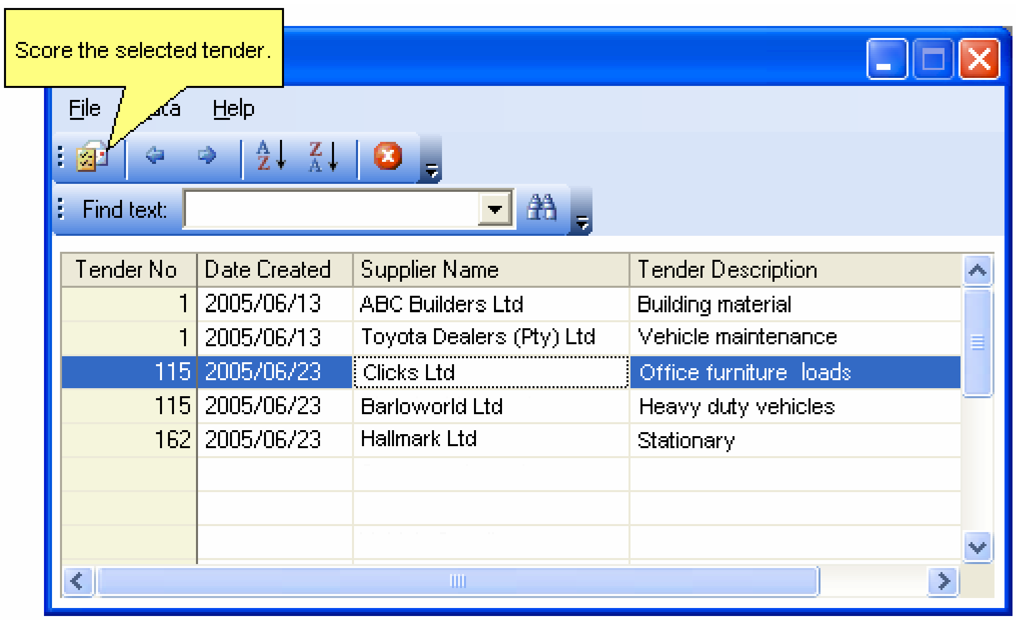


Figure: List of tender details to be scored

- Select the tender you wish to score from the grid and then select the (Scoring) icon to display the Score a Tender form.
- This form consists out of an *Evaluation Criteria section and a Possible Answers* section. Select the evaluation criterion in the hierarchy on the left and provide a rating, an answer and a comment on the right hand side of the form if required.
- To save this score, select the (Save) icon and to exit the form, select the (Close) icon.

Integration with RFx

Once all the responses have been captured by participants the results may be submitted to RFx. Validating the responses by the participants is a manual process, but after this, the responses are ready to be integrated back to RFx. You may submit the panel results as many times as necessary.

In the case where multiple participants captured responses of one specific template detail, the average of each of the responses is calculated, since only one value is sent to RFx upon integration.

Method: Integrating a tender with RFx

- To integrate a tender, select the (Integrate) icon on the main screens toolbar.
- The Integrate screen will display as follows:

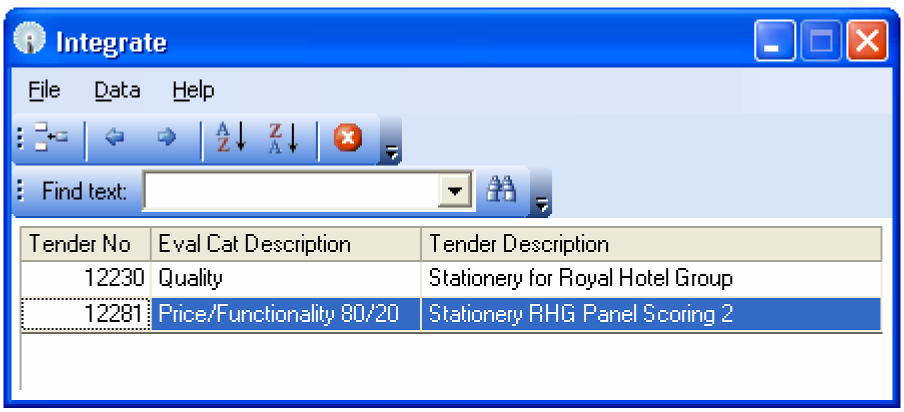


Figure: Integrate screen

- Select the tender to be integrated
- Select the (Integrate) icon
- A system message will display saying that your tender has been successfully integrated.
- Select the Close button to close the message.

Your tender has now been successfully integrated into RFx.