Panel Questionnaire (Technical Scoring) Quick Reference Guide
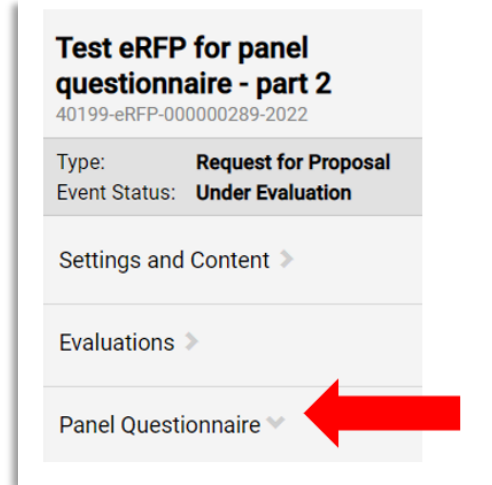
Jaggaer Sourcing Director (USG)

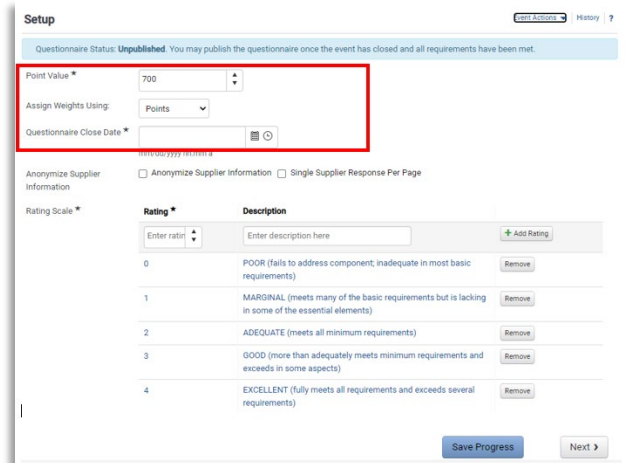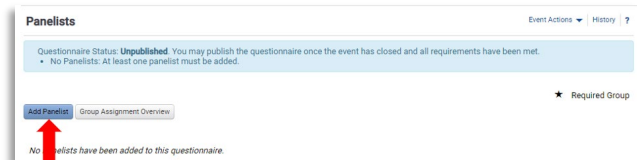| Panel Questionnaire (Technical Scoring)	
1. Locate Event and Access Panel Questionnaire Menu a. Find the event from the Sourcing Directory dashboard. b. Select "Panel Questionniare" from the left-hand side menu **NOTE:** the Panel Questionnaire can be set-up while the event is in "draft", "open" or "under evaluation" status. It is recommended to set-up panel questionnaire after the RFP closes to ensure final version of scored event questions are copied over when setting up the panel questionnaire for scoring.	**Test eRFP for panel questionnaire - part 2** 40199-eRFP-000000289-2022 Type: **Request for Proposal** Event Status: **Under Evaluation** Settings and Content › Evaluations › Panel Questionnaire ⌄ ⬅
2. Complete Setup a. Points Value defaults to 700. Adjust as needed to match RFP. b. For "Assign Weights Using" field, leave set to "Points" c. For "Questionnaire Close Date" enter the date and time that the technical evaluation team must complete technical scoring. NOTE: the buyer can extend the deadline or close early as needed. d. Anonymize Supplier Information – don't check either box. e. Observer Rating Scale (prepopulates if buyer selected eRFP template when creating event). If rating scale is empty, contact SPD for assistance. f. Select "Save Progress" and click "Next."	Setup Questionnaire Status: **Unpublished.** You may publish the questionnaire once the event has closed and all requirements have been met. Point Value * 700 Assign Weights Using: Points Questionnaire Close Date * mm/dd/yyyy hh:mm a Anonymize Supplier Information ☐ Anonymize Supplier Information ☐ Single Supplier Response Per Page Rating Scale * Rating * Description Enter rating / Enter description here ✚ Add Rating 0 POOR (fails to address component; inadequate in most basic requirements) Remove 1 MARGINAL (meets many of the basic requirements but is lacking in some of the essential elements) Remove 2 ADEQUATE (meets all minimum requirements) Remove 3 GOOD (more than adequately meets minimum requirements and exceeds in some aspects) Remove 4 EXCELLENT (fully meets all requirements and exceeds several requirements) Remove Save Progress Next ›
3. Add Panelists a. Contact college/university procurement officer (CUPO) to create Jaggaer Sourcing Director user accounts for each evaluation team member. CUPO will send a request to procurementhelp@doas.ga.gov to request "panelist" role for each evaluation team member. b. Once panelist accounts created, buyer will select "Add Panelist" c. On the "User Search" pop-up box, select "search"	Panelists Questionnaire Status: **Unpublished.** You may publish the questionnaire once the event has closed and all requirements have been met. • No Panelists: At least one panelist must be added. ★ Required Group Add Panelist Group Assignment Overview No panelists have been added to this questionnaire.

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d. Scroll through search results and click the "Add Panelist" button for each evaluation team member to add. Once finished, click "Close"

e. Confirm all evaluation team members have been selected. Click the "Action" button to the right of the evaluation team member to "remove" if needed or modify evaluation assignment.

f. Select "Save Progress" and then click "Next"

4. Select Panel Questions for Scoring

a. Select "Add Page"

b. Select "Add Page from Event"

c. Click the drop-down arrow for "Question Page" and select "Mandatory Scored Questions"

d. Select "Save Changes"

e. Observe Mandatory Scored Questions page has been added.

f. Click to return to "Panel Questions" menu

g. Select "Add Page" and then "Add Page from Event" to select "Additional Scored Questions"

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h. Repeat steps above until all pages with scored questions have been added to the panel questionnaire
i. Return to the "Panel Questions" menu
j. Obseve the empty "Page 1" placeholder line. Select "Actions" on the right-hand side and select "Delete". Click "yes" to confirm deleting empty page.
k. Confirm the only pages remaining are those from the event to be scored.
l. Select "Save Progress" and click "Next" until you advance to the "Question Weight" menu

5. **Assign Question Weight**
   a. From the "Question Weight" menu on the left-hand side menu, access the screen to distribute the technical points.
   b. Click on the pages (Mandatory Scored Question, Additional Scored Questions) to collapse.
   c. Start by distributing the technical points at the highest level between mandatory scored and Additional Scored (for example, 500 for mandatory scored and 200 for additoinal scored)
   d. Next, open up each page to assign points at the "group" level.
   e. Finally, assign points at the question level. As you progress, observe the total calculations to ensure you have distributed all available technical points.
   f. Select "Save Progress" and click "Next"

6. **Add Suppliers to be Scored**
   a. Select the "Add Supplier" button
   b. Select all suppliers that have passed administrative review
   c. Select "Save Progress" and click "Next"

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7. Review and Publish

   a. Conduct Evaluation Team Kick-Off meeting, ensure all evaluation team members have completed SPD-SP039 Evaluation Committee Member Participation Form

   b. Share names of suppliers with evaluation team members and ensure no conflicts of interests

   c. Review rating scale and SPD-EP023 Evaluation Committee Guidelines

   d. Select "Public Questionnarei" to release panel questionnaire

   e. Alert evaluation team members that they will each receive an email once he panel questionnaire is released with link to access the panel. This is the easiest way to logon and access the questionnaire for technical scoring.