



Panel Questionnaire (Technical Scoring) Quick Reference Guide

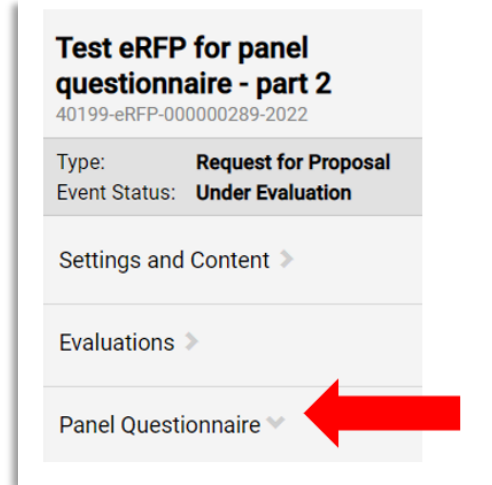
Jaggaer Sourcing Director (USG)

Panel Questionnaire (Technical Scoring)

1. Locate Event and Access Panel Questionnaire Menu

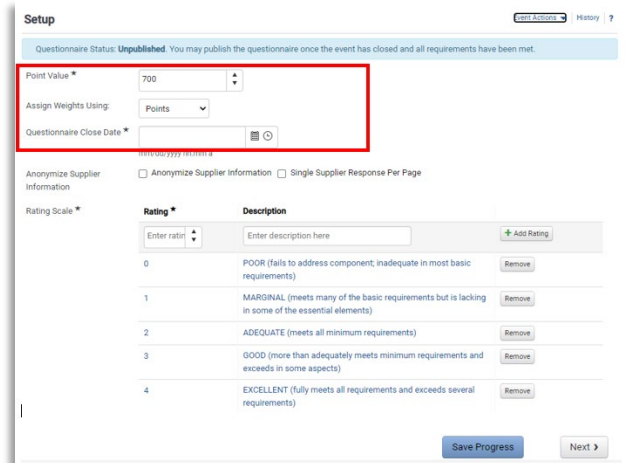
- Find the event from the Sourcing Directory dashboard.
- Select "Panel Questionnaire" from the left-hand side menu

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.



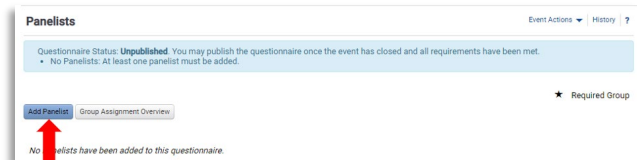
2. Complete Setup

- Points Value defaults to 700. Adjust as needed to match RFP.
- For "Assign Weights Using" field, leave set to "Points"
- 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.
- Anonymize Supplier Information – don't check either box.
- Observer Rating Scale (prepopulates if buyer selected eRFP template when creating event). If rating scale is empty, contact SPD for assistance.
- Select "Save Progress" and click "Next."



3. Add Panelists

- 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.
- Once panelist accounts created, buyer will select "Add Panelist"
- On the "User Search" pop-up box, select "search"



Panel Questionnaire (Technical Scoring)

- 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”

User Search

Show Advanced Search

Search:

Search by first or last name, e-mail address or username

Search **Close**

Train, AUDstudent14	AUDstudent14	AUDstudent14train@doas.ga.gov	+1 404-657-6000	Add Panelist
Train, AUDstudent09	AUDSTUDENT09	AUDstudent09train@doas.ga.gov	+1 404-657-6000	Add Panelist
Train, AUDstudent08	AUDSTUDENT08	AUDstudent08train@doas.ga.gov	+1 404-657-6000	Add Panelist
Train, AUDstudent11	AUDstudent11	AUDstudent11train@doas.ga.gov	+1 404-657-6000	Add Panelist

Train, AUDstudent14	AUDstudent14	AUDstudent14train@doas.ga.gov	+1 404-657-6000	Added
Train, AUDstudent09	AUDSTUDENT09	AUDstudent09train@doas.ga.gov	+1 404-657-6000	Added
Train, AUDstudent08	AUDSTUDENT08	AUDstudent08train@doas.ga.gov	+1 404-657-6000	Added
Train, AUDstudent11	AUDstudent11	AUDstudent11train@doas.ga.gov	+1 404-657-6000	Added

Add Panelist Group Assignment Overview

Panelist Name	Assigned Question Group	Progress	Action
AUDstudent08 Train	All	Not Started	Action
AUDstudent09 Train	All	Not Started	Action
AUDstudent11 Train	All	Not Started	Action
AUDstudent14 Train	All	Not Started	Action

Edit Group Assignment
Remove Panelist

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”

Panel Questions Event Actions | History

Questionnaire Status: **Unpublished**. You may publish the questionnaire once the event has closed and all requirements have been met.
* Blank group: group "Group 1" must contain at least one question.

1 Pages of Questions Overall Total: 0%

#	Page Title	Question Groups	Total # of Questions	Weight (Point)	Actions
1	Page 1	Group 1	0	0	Actions

Add Page **Add Page from Event**

Add Page
Add Page from Library
Add Page from Event

Add Question Page from Event

Choose Where to Add From

Question Page: Supplier General Information

Show Display Position Options: Supplier General Information, Mandatory Questions, **Mandatory Scored Questions**, Additional Scored Questions

* Required **Close**

Test eRFP for Demonstration Mandatory Scored Questions Event Actions | History

Questionnaire Status: **Unpublished**. You may publish the questionnaire once the event has closed and all requirements have been met.
Please enter your questions into groups below: Add New | Add from Library | Add from Event

Settings and Content > Group 2: 1: **Mandatory Scored Questions** Group Total: 0% Member Group: | Delete Selected Questions

#	Question Text	Weight (Point)	Setup
2.1.1	Please confirm your capabilities to meet the following requirements: XXXXXX	0	Setup
2.1.2	Please share your previous experience providing these services, including at least 3 references.	0	Setup

Panelist: **Panel Questions** **Assignments**

Page 1
Mandatory Scored Quest...

Panel Questionnaire (Technical Scoring)

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

The first screenshot shows the "Panel Questions" interface with 2 pages of questions. The "Page 1" placeholder is highlighted with a red box, and the "Add Page from Event" button is also highlighted with a red box.

The second screenshot shows the "Panel Questions" interface with 3 pages of questions. The "Page 1" row is highlighted with a red box, and the "Delete" option in the "Actions" dropdown menu is highlighted with a red arrow.

The third screenshot shows a "Delete Page" dialog box with the question "Are you sure that you want to delete this page and all of its questions?" and "Yes" and "No" buttons.

5. Assign Question Weight

- From the "Question Weight" menu on the left-hand side menu, access the screen to distribute the technical points.
- Click on the pages (Mandatory Scored Question, Additional Scored Questions) to collapse.
- 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 additional scored)
- Next, open up each page to assign points at the "group" level.
- Finally, assign points at the question level. As you progress, observe the total calculations to ensure you have distributed all available technical points.
- Select "Save Progress" and click "Next"

The first screenshot shows the "Question Weight" interface with a total point value of 700. The "Mandatory Scored Questions" section is expanded, showing a total of 500.00 points assigned. The "Additional Scored Questions" section is collapsed, showing a total of 200.00 points assigned.

The second screenshot shows the "Question Weight" interface with a total point value of 700. The "Mandatory Scored Questions" section is expanded, showing a total of 500.00 points assigned. The "Additional Scored Questions" section is expanded, showing a total of 200.00 points assigned. The "Please confirm your capabilities to meet the following requirements: XXXXXX" question is assigned 250.00 points, and the "Please share your previous experience providing these services, including at least 3 references." question is assigned 250.00 points.

The third screenshot shows the "Question Weight" interface with a total point value of 700. The "Mandatory Scored Questions" section is expanded, showing a total of 500.00 points assigned. The "Additional Scored Questions" section is expanded, showing a total of 200.00 points assigned. The "Please share any additional value added services you offer." question is assigned 200.00 points.

6. Add Suppliers to be Scored

- Select the "Add Supplier" button
- Select all suppliers that have passed administrative review
- Select "Save Progress" and click "Next"

The screenshot shows the "Suppliers" interface with a total point value of 700. The "Add Supplier" button is highlighted with a red arrow.

Panel Questionnaire (Technical Scoring)

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

◀ Previous

Publish Questionnaire

