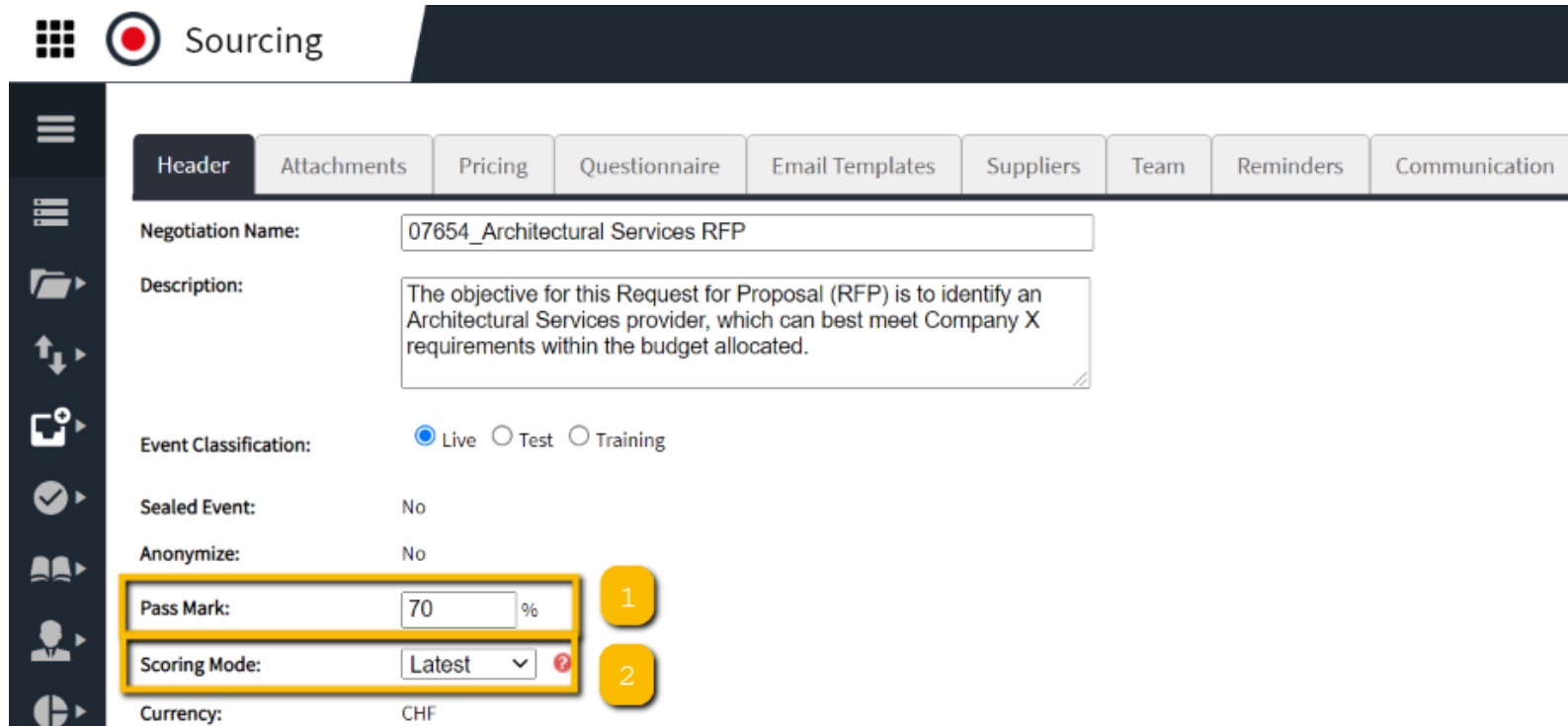# How to evaluate a tender

The Medius Sourcing module supports automatic and manual scoring of tenders. The ability to take full advantage of the scoring functionality relies on a user adding scores to questions in the Questionnaire as part of a tender creation process. For more details on the tender creation (please see *"How to create a Tender"* guide).
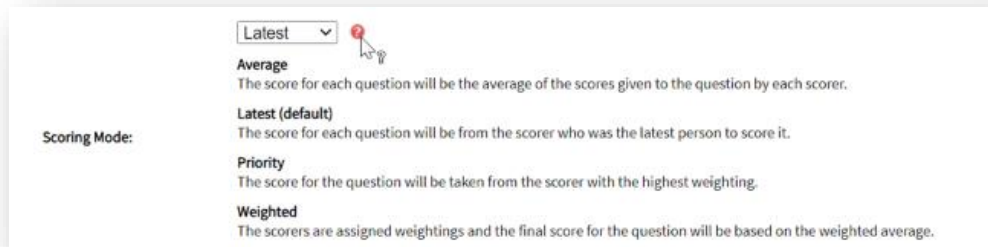
Setting Scoring Mode and Pass Mark

1. A **Pass Mark** option within the Header tab allows the event owner to set a minimum % threshold for a specific tender with the aim of quickly highlighting supplier responses that do not meet the minimum criteria.

2. The **Scoring Mode** option allows a user to set the evaluation logic for a tender. Hover your mouse cursor over the question mark 🅐 tooltip to select the scoring mode most suitable for your tender. There are four scoring modes available:
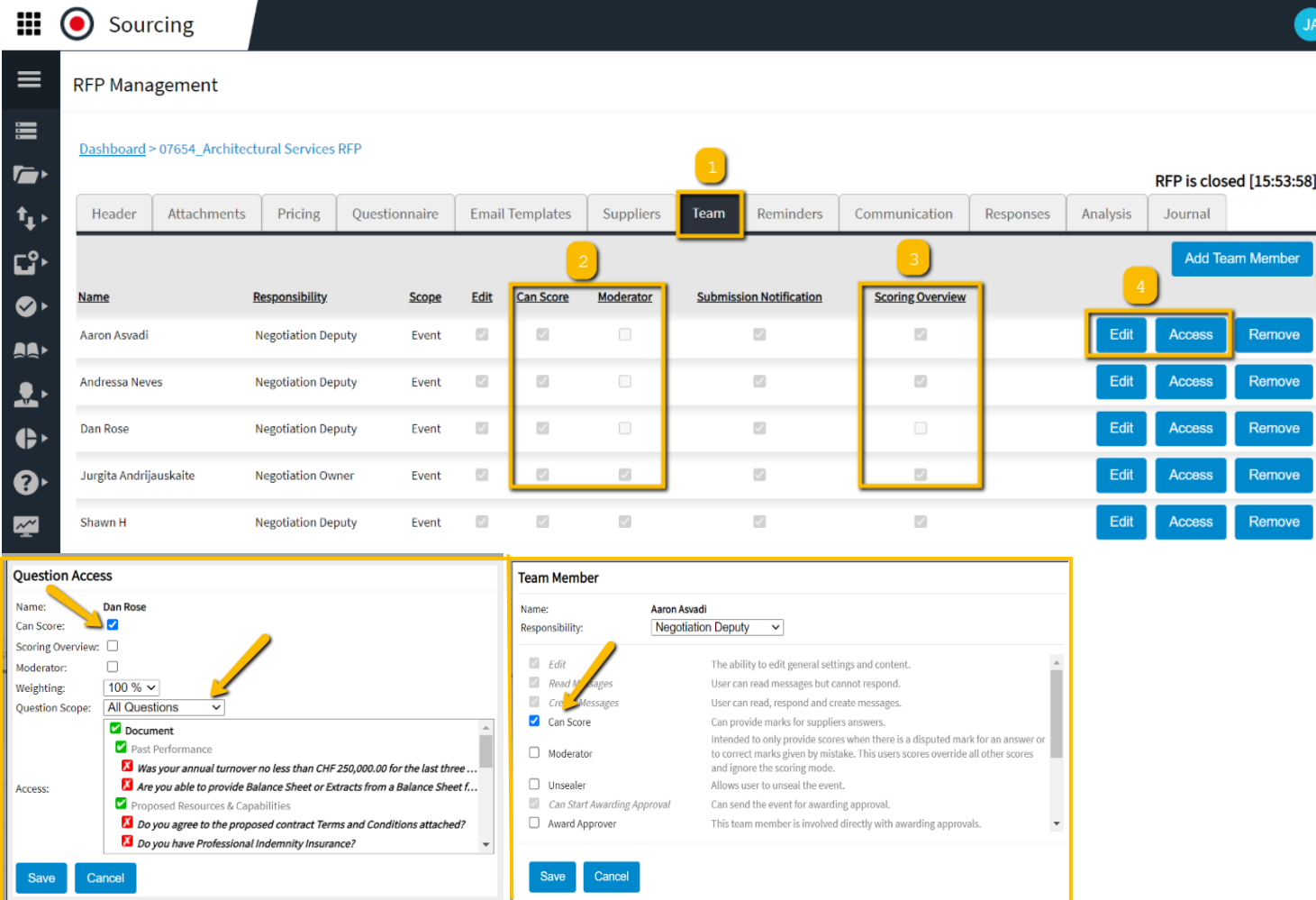
- **Average** – the score for each question will be the average of the scores given to the question by each scorer.
- **Latest (system default)** – the score for each question will be from the scorer who was the latest person to score it.
- **Priority** – the score for the question will be taken from the score with the highest weighting
- **Weighted** – the scorers are assigned weightings and the final score for the question will be based on the weighted average

Inviting and Setting Permissions for Scorers

Once the Scoring Mode and Pass Mark is determined, the next step is to invite stakeholders who will need to evaluate the tender and set their permissions. This can be managed in the Team tab.

1. Navigate to the **Team** tab and add Team Members.
2. You will notice that some permissions will be automatically applied to a user – this is based on the system role a user already has in the Admin Centre.
3. Other permissions, such as access to Scoring Overview, can be manually added on a tender by tender basis.
4. You can manage permissions by clicking on the **Edit** button and view user access to tender by clicking on the **Access** button. If using the priority or weighted scoring methods, set the weighting for each user with scoring access. By

default, the system allows access to score all question to a team member with a scoring permission, to block user access to all questions, set the question scope to **Specific Questions**.

5. To manage scorer access to only specific questions, go back to the *Questionnaire* tab and click on *Scorer* button underneath a question object to block or allow scorer access to a question.

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| 1. INTRODUCTION | 2. TENDER PROCEDURE | 3. TECHNICAL SECTION | 4. COMMERCIAL SECTION | 5. SUBMISSION DECLARATION |

Page Start: **TECHNICAL SECTION**

3 TECHNICAL QUESTIONS

Have you been auth **5** o complete the Technical section of this Architectural services RFP? ·

○ Yes

○ No

| Insert Below | Scorers | Edit |

Section: **Past Performance** This section has a weighting of **15%**.

Scorers

Question: Have you been authorized to complete the Technical section of this Architectural services RFP?

Available Scorers			Scorers With Access	
Aaron Asvadi	Allow	Block	Aaron Asvadi	
Andressa Neves	Allow	Block	Andressa Neves	Remove
Dan Rose	Allow	Block	Jurgita Andrijauskaite	
Jurgita Andrijauskaite	Allow	Block	**Blocked Scorers**	
Shawn H	Allow	Block	Dan Rose	Remove
			Shawn H	

| Finish |

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Automatic Scoring

1. If you added scores to the closed type question answers within the questionnaire, then the system will automatically calculate the total supplier score in the Responses tab based on the answers that a supplier selects. This will only be visible to buyers and not suppliers.
2. If you marked any answers within the questionnaire as '**Required Answer?**', then the system will automatically disqualify suppliers that did not select the required answers by marking them "OUT" in the Responses tab. This will only be visible to buyers and not suppliers.

3. The **Responses** tab will automatically display the total score that a supplier collects during the tender process. The buyer can see a high level summary of supplier scores, that provides an indication of the quality of submissions:

a) Total % score
b) Marks acquired vs. total available marks
c) Pass/fail indication if a supplier failed to provide a required answer or has not answered all mandatory questions.

Please note that this view considers automatic as well as manual scores provided by the scorers (For more details, please see the section *Manual Scoring*)

RFP Management

4. A team member with the Moderator's permission has the authority to override automatic scores. This can be done from the *Responses* tab by clicking on the *Scoring* button for a particular supplier.

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RFP Management

RFP closes in 22 Minutes, 46 Seconds [16:18:12]

| Header | Attachments | Pricing | Questionnaire | Email Templates | Suppliers | Team | Reminders | Communication | **Responses** | Analysis | Journal |

Document Pass Mark: 70 %

Search by: [Supplier Name ▾] [Select Supplier]   **Search**   **Clear Search Results**

*Calculated Scores Shown [Overall Scores ▾]   Items per page: [20 ▾]

Name	Accessed?	Declined?	Progress	Responded?	Score (100 %)	Marks		Unanswered Mandatory Questions		
Bureau Architect GmbH ⓘ	☑	☐	100.00 %	☑	75.24 %	(158 / 210)*	OUT	0	PDF	Scoring
Magic Designs S.A. ⓘ	☑	☐	100.00 %	☑	81.43 %	(171 / 210)*	Passed (score)	0	PDF	Scoring
Smith & Sons Architects Ltd. ⓘ	☑	☐	100.00 %	☑	89.52 %	(188 / 210)*	Passed (score)	0	PDF	Scoring

Score Matrix   **Export RFx data**   **Download All Responses**

5. Then select a question where you need to override the existing score and enter the new score and comments and click **Save**. The system will update the score and the new total score will be shown in the Responses tab for that supplier.

3 TECHNICAL QUESTIONS

Have you been authorized to complete the Technical section of this Architectural services RFP? ·

- Yes
- No

Scored: 10 out of 10.
Answered by: Magic Designs S.A.

There are 10 automatic marks available for this question. 10 have been awarded.

Override automatic score with   8   5

Notes : comments

Please ensure that where possible all comments are factual. Where an opinion is expressed please ensure that opinion adheres to internal legal guidelines.

⊞   Calculated score is 10 out of 10

6. Within the **Scoring** view, an evaluator can highlight different types of information within the questionnaire and required assessment process:

a) Unanswered mandatory questions
b) Required answer failure
c) Requires manual scoring
d) Requires manual assessment
e) Scores and notes

Manual Scoring

1. **System based manual scoring**

   Free type questions may be subject to manual scoring. Due to a subjective nature of supplier answers, a maximum available score can be applied to a question. It is evaluator(s) responsibility to review supplier answers and enter a score based on the quality of a response provided by a supplier. To enter manual scores, click on the *Scoring* button for a particular supplier in the **Responses** tab (please refer to the Automatic scoring, section 4 above). Then select a question where a manual score is required, read supplier response, and enter an appropriate score out of the maximum number of points available for that question. In addition, you can provide justification for your score in the *Notes* section. If there is more than one scorer providing the scores, you will be able to see their respective scores and notes beneath the question.

2. Template based manual scoring

It is possible to score a tender using a template via the '*Import/Export Scoring Sheet*' feature available in the *Scoring* element of the *Responses* tab. It is a great feature for those scorers who are infrequent users of the system and prefer to provide their scores in the Excel spreasheet instead of doing it online. A project owner can download scoring sheets on behalf of evaluators, email them their scoring sheets and then reupload them back in to the system with their scores and without needing the scorers to log in to the system.

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:::	◉ Sourcing	JA

Supplier Response

Back to documents

On Behalf Of : **Magic Designs S.A.**

[Compare Submission History] [Download Comments] [Download Response] [Import/Export Scoring Sheet] ②

Highlight ☐ Unanswered Mandatory Questions ☐ Required Answer Failure ☐ Requires Manual Scoring ☐ Requires Manual Assessment ☐ Scores and Notes

1. INTRODUCTION	2. TENDER PROCEDURE	3. TECHNICAL SECTION	4. COMMERCIAL SECTION	5. SUBMISSION DECLARATION

Page Start: **INTRODUCTION**

1 INTRODUCTION

REQUEST FOR PROPOSAL FOR ARCHITECTURAL SERVICES 2020

Company X is conducting a competitive solicitation process to identify and carry out Architectural Services for the Urban Design for Regeneration and Development of lands.

Company X hereby invites your firm to submit a proposal in response to Request for Proposal (RFP) using online eSourcing tool.

Scoring Import/Export

As the owner or moderator of this tender you can import and export scores for any team member.

On Behalf Of : Jurgita Andrijauskaite ▾

Export Scoring Sheet

Click on the download button below to download the scoring template for this tender which can be completed and re-imported back in to this tender.

Download Template

Import Scoring Sheet

Browse to the completed scoring sheet and select 'Import Scores' to import them in to this tender for the current supplier.
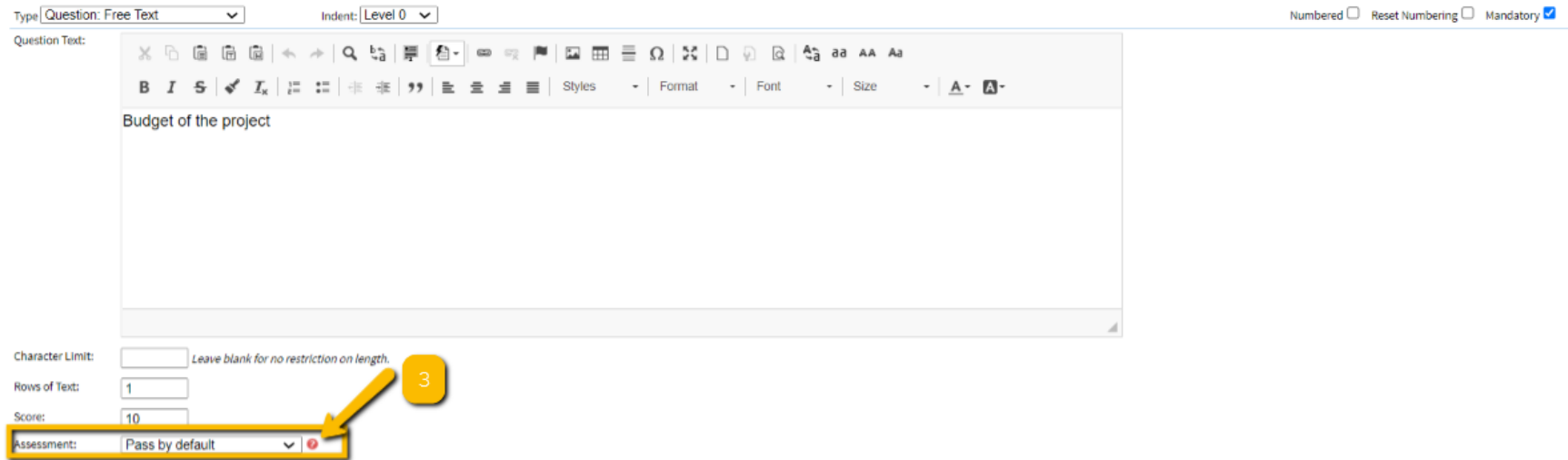
Choose File   No file chosen   Import Scores

Close

Free questions marking sheet

Enter your marks for each of the manually scored questions in the green 'Score' column.

			Marks Available	Score	Pass	Comment
Document	07654_Architectural Services RFP					
Scorer	Jurgita Andrijauskaite					
Supplier	Magic Designs S.A.					
Number	**Question**	**Answer**				
1	INTRODUCTION		0			
2	TENDER PROCEDURE		0			
3	TECHNICAL QUESTIONS		0			
	Have you been authorized to complete the Technical section of this Architectural services RFP?	Yes	10	10		
	Past Performance		0			
1.	Was your annual turnover no less than CHF 250,000.00 for the last three years?	Yes	10	10		
2.	Are you able to provide Balance Sheet or Extracts from a Balance Sheet for the past 3 years under your current trading name?	Yes (please attach)	10	10		
	Proposed Resources & Capabilities		0			

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3. Manual question assessment options

When setting up scores for manual tender questions, it is also possible to choose an **Assessment** type per question. This is an additional control to having manual marks available for that question.

Available **Assessment** options are listed below:

a) **Pass by default** – no manual assessment necessary
b) **Pass when not rejected** – no action by a scorer counts as a pass by default
c) **Pass only when confirmed** – pass only when a scorer has selected that the answer is accepted

4. Submitting the scores

It is important to remember to scroll to the bottom of the page and click on the '**Submit Scores**' when the scoring has been completed.

Score Matrix

Scorers/Stakeholders with access can view the summary of supplier responses grouped by either Header or Section elements at any time during the tender evaluation process. The '**Score Matrix**' option, available in the **Responses** tab, displays the most recent supplier score comprised of automatic and manual scores and takes in to account the scoring mode as well as any weightings applied to sections or scorers. This view is a byproduct of the system that amalgamates the entire evaluation mechanism that has been applied to the tender.

The Score Matrix output can be exported to Excel:

RFP Management

Dashboard > 07654_Architectural Services RFP

RFP is closed [17:36:51

| Header | Attachments | Pricing | Questionnaire | Email Templates | Suppliers | Team | Reminders | Communication | Responses | Analysis | Journal |

Back to Responses | Export Results

Calculated Scores Shown

Group By: Section Elements ▾ Display as weighted score ☑

Supplier	Past Performance (15%)		Proposed Resources & Capabilities (30%)		Terms of Reference & Representative Tasks (25%)		Rates (30%)		Overall (100%)		Rank	
	Score / 20	Weighted Score / 31.5	Score / 50	Weighted Score / 63	Score / 90	Weighted Score / 52.5	Score / 40	Weighted Score / 63	Score / 210	Weighted / 210	Score	Weighted
Bureau Architect GmbH	14.00	22.05	48.00	60.48	71.00	41.42	15.00	23.63	158.00	147.57	3rd	3rd
Magic Designs S.A.	20.00	31.50	40.00	50.40	81.00	47.25	20.00	31.50	171.00	160.65	2nd	2nd
Smith & Sons Architects Ltd.	20.00	31.50	50.00	63.00	78.00	45.50	30.00	47.25	188.00	187.25	1st	1st

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Score Matrix by Supplier

The score matrix in an eRFx now allows you to search, select and view a single supplier.

When selecting the 'Score Matrix' button, a box will appear allowing you to search and select suppliers who have been invited to the event. All suppliers can be viewed in the matrix by simply ticking the **Score Matrix** for all Suppliers' option.
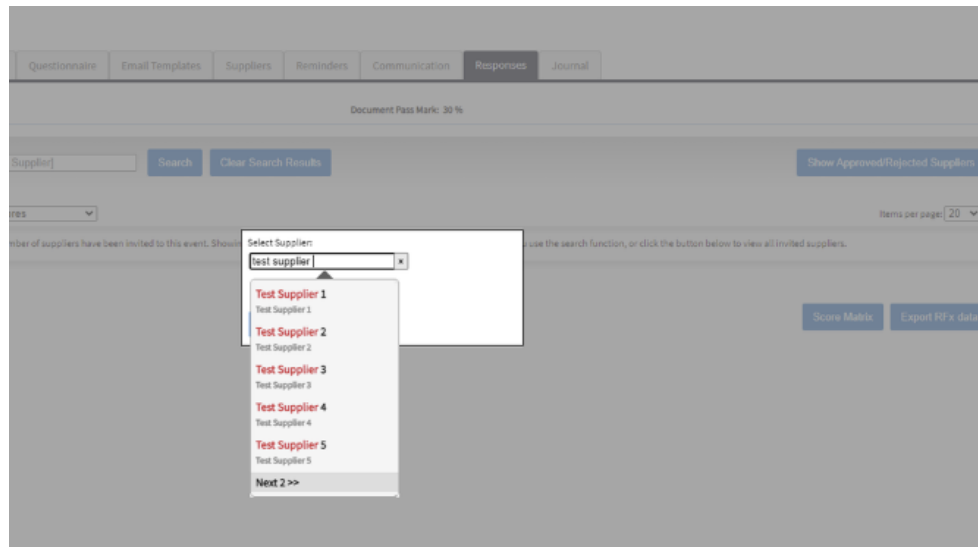
Score Matrix Focused Score

The score matrix has the option to display a focused score, this removes the scores associated to any nested questions that a supplier was not required to complete.

If grouping the score matrix by **'Section Elements'** you will be able to view Overall Scores, Overall Weighted Scores, Focused Scores or Focused Weighted Scores.

In addition to the Score Matrix, there are a couple of other useful tender evaluation outputs available in the system:

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![medius](medius logo)

Supplier score comparison

Within the *Scoring* element of a supplier response there are the following options available:

1. *Compare Submission History* allows a buyer user to compare the latest supplier submision with any previous submissions that the same supplier may have made during the tender process.

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2. **Download Comments** exports all evaluators' scores per question/per supplier for an easy side by side score comparison

3. **Download Responses** allows a user to group and download supplier responses.

![medius]

Download Responses

Please select the options below to configure your download for this event.

Would you like to download only submitted responses or all responses including partially saved ones?

- ● All Responses
- ○ Submitted Responses Only

Should attachments be grouped by question, or all of the supplier's attachments be in a single folder

- ● Group by Question
- ○ Group by Supplier

[Download] [Cancel]

4. **Export RFX data** provides the total score of all suppliers within a tender in an easy side by side comparison view.

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RFP Management

Dashboard > 07654_Architectural Services RFP

RFP is closed [17:56:53]

| Header | Attachments | Pricing | Questionnaire | Email Templates | Suppliers | Team | Reminders | Communication | **Responses** | Analysis | Journal |

Document Pass Mark: 70 %

Search by: Supplier Name ⌄ [Select Supplier] **Search** **Clear Search Results**

* Calculated Scores Shown   Overall Scores ⌄   Items per page: 20 ⌄

Name	Accessed?	Declined?	Progress	Responded?	Score (100 %)	Marks		Unanswered Mandatory Questions			Award
Bureau Architect GmbH ⓘ	☑	☐	100.00 %	☑	75.24 %	(158 / 210)*	OUT	0	PDF	Scoring	☐
Magic Designs S.A. ⓘ	☑	☐	100.00 %	☑	81.43 %	(171 / 210)*	Passed (score)	0	PDF	Scoring	☐
Smith & Sons Architects Ltd. ⓘ	☑	☐	100.00 %	☑	89.52 %	(/ 210)*	(score)	0	PDF	Scoring	☐

Create Savings Record **Create Contract** **Score Matrix** **④ Export RFx data** **⑤ Download All Responses** **Update awards** **Send for approval**

4. Export RFx Data: 5. Download All Responses (please see section 3 above)

Download Responses

Please select the options below to configure your download for this event.

Would you like to download only submitted responses or all responses including partially saved ones?
- ● All Responses
- ○ Submitted Responses Only

Should attachments be grouped by question, or all of the supplier's attachments be in a single folder
- ● Group by Question
- ○ Group by Supplier

Download   **Cancel**

Awarding a tender

Once supplier responses have been evaluated and scored, the final step is to award a tender to the right supplier. For details on how to award a tender, please see the guide (Please see "*How to Award an eAuction or a Tender*" guide)