

# 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.

|     | Sourcing              |                                     |                                               |                                  |           |      |           |               |
|-----|-----------------------|-------------------------------------|-----------------------------------------------|----------------------------------|-----------|------|-----------|---------------|
| ≡   | Header Attachmen      | ts Pricing                          | Questionnaire                                 | Email Templates                  | Suppliers | Team | Reminders | Communication |
|     | Negotiation Name:     | 07654_Architec                      | tural Services RFP                            |                                  |           |      |           |               |
| /─  | Description:          | The objective fo                    | or this Request for F                         | Proposal (RFP) is to ide         | entify an |      |           |               |
| t₊, |                       | Architectural Se<br>requirements wi | ervices provider, wh<br>ithin the budget allo | ich can best meet Con<br>ocated. | npany X   |      |           |               |
| Ľ°≀ | Event Classification: | ◉ Live O Test                       | ○ Training                                    |                                  |           |      |           |               |
| • 🛇 | Sealed Event:         | No                                  |                                               |                                  |           |      |           |               |
|     | Anonymize:            | No                                  |                                               |                                  |           |      |           |               |
|     | Pass Mark:            | 70 %                                |                                               |                                  |           |      |           |               |
|     | Scoring Mode:         | Latest 🗸                            | 2 2                                           |                                  |           |      |           |               |
| •   | Currency:             | CHF                                 |                                               |                                  |           |      |           |               |



|              | Latest<br>Average<br>The score for each question will be the average of the scores given to the question by each scorer.    |  |  |  |  |  |  |  |
|--------------|-----------------------------------------------------------------------------------------------------------------------------|--|--|--|--|--|--|--|
| coring Mode: | Latest (default)<br>The score for each question will be from the scorer who was the latest person to score it.              |  |  |  |  |  |  |  |
|              | Priority<br>The score for the question will be taken from the scorer with the highest weighting.                            |  |  |  |  |  |  |  |
|              | Weighted<br>The scorers are assigned weightings and the final score for the question will be based on the weighted average. |  |  |  |  |  |  |  |

- 2. The **Scoring Mode** option allows a user to set the evaluation logic for a tender. Hover your mouse cursor over the question mark <sup>2</sup> 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**.

|                    | <b>i</b> So   | ourcing                  |                                   |                            |       |                         |                      |                                                                    |                                                                       |                                     |          |             | J             |          |
|--------------------|---------------|--------------------------|-----------------------------------|----------------------------|-------|-------------------------|----------------------|--------------------------------------------------------------------|-----------------------------------------------------------------------|-------------------------------------|----------|-------------|---------------|----------|
| ≡                  | RFP M         | anagement                |                                   |                            |       |                         |                      |                                                                    |                                                                       |                                     |          |             |               |          |
| ≣<br><b>∕</b> ∎    | <u>Dashbo</u> | oard > 07654_Archite     | ctural Services                   | RFP                        |       |                         |                      | 1                                                                  |                                                                       |                                     |          | RFP is clos | ed [15:53:58  | 1        |
| t₊.                | Head          | er Attachments           | Pricing                           | Questionnaire              | Email | Templates               | Suppliers            | Team Reminders                                                     | Communication                                                         | Responses                           | Analysis | Journal     | cu [10:00:00] | <u>.</u> |
| ۲°۰                |               |                          |                                   |                            |       |                         | 2)                   |                                                                    | 3                                                                     |                                     | _        | Add Tex     | am Member     |          |
| Ø •                | <u>Name</u>   |                          | Responsibility                    | Scope                      | Edit  | Can Score               | Moderator            | Submission Notification                                            | Scoring Overview                                                      | 1                                   | 4        |             |               |          |
|                    | Aaron As      | svadi                    | Negotiation Dep                   | outy Event                 | 2     |                         |                      |                                                                    |                                                                       |                                     | Edit     | Access      | Remove        |          |
| <b>.</b>           | Andress       | a Neves                  | Negotiation Dep                   | outy Event                 |       |                         |                      |                                                                    |                                                                       |                                     | Edit     | Access      | Remove        |          |
| <b>()</b>          | Dan Ros       | e                        | Negotiation Dep                   | outy Event                 |       |                         |                      |                                                                    |                                                                       |                                     | Edit     | Access      | Remove        |          |
| <b>@</b> >         | Jurgita A     | Andrijauskaite           | Negotiation Ow                    | ner Event                  |       |                         |                      |                                                                    |                                                                       |                                     | Edit     | Access      | Remove        |          |
| <b>~</b>           | Shawn H       | ł                        | Negotiation Dep                   | outy Event                 |       | 2                       |                      |                                                                    |                                                                       |                                     | Edit     | Access      | Remove        |          |
| Questio            | n Access      |                          |                                   |                            |       | Team Mem                | ber                  |                                                                    |                                                                       |                                     | -        |             |               |          |
| Name:<br>Can Score | Dan<br>Z      | Rose                     |                                   |                            |       | Name:<br>Responsibility | Aaro                 | n Asvadi<br>gotiation Deputy V                                     |                                                                       |                                     |          |             |               |          |
| Scoring O          | verview: 🗆    |                          | /                                 |                            |       |                         | /                    |                                                                    |                                                                       |                                     |          |             |               |          |
| Moderato           | : 0           |                          |                                   |                            |       | Edit<br>Read M          | Larres               | The ability to edit general setti<br>User can read messages but ca | ings and content.<br>appot respond                                    | Â                                   |          |             |               |          |
| Question 9         | cone: All     | Questions                |                                   |                            |       | Cre                     | Messages             | User can read, respond and cre                                     | eate messages.                                                        |                                     |          |             |               |          |
|                    |               | Document                 |                                   |                            |       | Can Sco                 | re                   | Can provide marks for supplier                                     | rs answers.                                                           |                                     |          |             |               |          |
|                    | •             | Past Performance         |                                   |                            |       | Modera                  | tor                  | Intended to only provide score<br>to correct marks given by mista  | es when there is a disputed mark<br>ake. This users scores override a | for an answer or<br>Il other scores |          |             |               |          |
|                    |               | Was your annual turnov   | er no less than CHF               | 250,000.00 for the last th | ree   |                         | r.                   | and ignore the scoring mode.                                       | ÷                                                                     |                                     |          |             |               |          |
| Access:            |               | Proposed Resources & Ca  | palance Sheet or Ex<br>pabilities | tracts from a Balance Sh   | eet f | Can Sta                 | rt Awarding Approval | Can send the event for awardir                                     | ng approval.                                                          |                                     |          |             |               |          |
|                    |               | Do you agree to the prop | posed contract Tern               | ns and Conditions attach   | ed?   | Award A                 | pprover              | This team member is involved                                       | directly with awarding approva                                        | s. 👻                                |          |             |               |          |
|                    |               | 🗴 Do you have Profession | al Indemnity Insurar              | nce?                       | Ŧ     |                         |                      |                                                                    |                                                                       |                                     |          |             |               |          |
| Save               | Cancel        |                          |                                   |                            |       | Save                    | Cancel               |                                                                    |                                                                       |                                     |          |             |               |          |

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.



| Page Start: TECHNICAL SECTION  3 TECHNICAL QUESTIONS  Have you been auth 5 to cor Ves No Insert Below Section: Past Performance This stochor he Section: Past Performance This stochor he Section: Have you been authorized to co services RFP?  Available Scorers Aaron Asvadi Allow Bid Dan Rose Allow Bid Jurgita Andrijauskaite Allow Bid                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | malata the Tachaical agetics of shi         |                                 |  |
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| Have you been auth 5 o cor<br>Yes<br>No<br>Insert Below<br>Section: Past Performance - This Section has<br>Section: Past Per | mulata the Technical section of this        |                                 |  |
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| corers<br>uestion: Have you been authorized to co<br>ervices RFP?<br>Available Scorers<br>Aaron Asvadi Allow Bit<br>Dan Rose Allow Bit<br>Jurgita Andrijauskaite Allow Bit                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | es a weighting of 15%.                      |                                 |  |
| uestion: Have you been authorized to co<br>ervices RFP?<br>Available Scorers<br>Aaron Asvadi Allow Bid<br>Andressa Neves Allow Bid<br>Dan Rose Allow Bid                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                             |                                 |  |
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| Aaron Asvadi Allow Bk<br>Andressa Neves Allow Bk<br>Dan Rose Allow Bk<br>Jurgita Andrijauskaite Allow Bk                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Scorers With Access                         |                                 |  |
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| Jurgita Andrijauskaite Allow Blo                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | lock Jurgita Andrijauskaite                 |                                 |  |
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| Shawn H Allow Ble                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                             | Remove                          |  |
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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.

| Type Question                             | : Radio Button 🔹 Indent: Level 0 👻                                                                                                                                             | et Numbering 🗌 Mandatory |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| Question                                  | ※ 凸 値 団 値 ← →   Q, 站   胛 <u>和</u> - ∞ ∞ ℙ   □ 田 亜 亜 Ξ Ω   33   □ ᡚ Q   43 aa AA Aa<br>B I S   ダ 仄   二 二 半 非   11   主 主 三 ■   Styles -   Format -   Font -   16   <u>A</u> - ⊠- |                          |
|                                           | Have you been authorized to complete the Technical section of this Architectural services <u>RFP</u> ?                                                                         |                          |
|                                           |                                                                                                                                                                                |                          |
|                                           |                                                                                                                                                                                |                          |
|                                           | body span                                                                                                                                                                      | 4                        |
| Columns                                   | 1 2                                                                                                                                                                            |                          |
|                                           | Yes Score: 10 Zequired Answer?                                                                                                                                                 | $\pm$ $\sim$ $\times$    |
| Answer 1                                  |                                                                                                                                                                                | $\pm$ $\sim$ $\times$    |
| Answer 1<br>Answer 2                      | No Score: 0 Required Answer?                                                                                                                                                   |                          |
| Answer 1<br>Answer 2<br>Attach standard o | No Score: 0 Required Answer?                                                                                                                                                   |                          |

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

| <u>Dashboard</u> > | 07654_Archite     | ectural Services I | RFP       |                      |                |           |                   |               |                |                            |         |          |                |            |
|--------------------|-------------------|--------------------|-----------|----------------------|----------------|-----------|-------------------|---------------|----------------|----------------------------|---------|----------|----------------|------------|
| Header             | Attachments       | 5 Pricing          | Questionn | aire Email Templates | Suppliers      | Team      | Reminders         | Communication | Responses      | Analysis                   | Journal | RI       | -P is closed   | [15:55:53] |
|                    |                   |                    |           |                      |                | Documen   | t Pass Mark: 70 % |               |                |                            |         |          |                |            |
| Search by: S       | Supplier Name     | ✓ [Select Sup      | oplier]   | Search               | Clear Search F | Results   |                   |               |                |                            |         |          |                |            |
| * Calculated       | Scores Shown      | Overall Scores     |           |                      |                |           | 3                 |               |                |                            |         |          | Items per page | : 20 🗸     |
| Name               |                   | Accessed?          | Declined? | Progress             |                | Responded | 1? Score (100 %)  | Marks         |                | Unanswered<br>Mandatory Qu | estions |          |                | Award      |
| Bureau Archite     | ect GmbH          |                    |           | 100.00 %             |                |           | 75.24 %           | (158/210)* O  | т              | <u>0</u>                   |         | PDF      | Scoring        |            |
| Magic Designs      | <u>s.a.</u> (1)   |                    |           | 100.00 %             |                |           | 81.43 %           | (171/210)*    | Passed (score) | ٥                          |         | PDF      | Scoring        |            |
| Smith & Sons /     | Architects Ltd, 🛈 | ) 🗷                |           | 100.00 %             |                |           | 89.52 %           | (188/210)*    | Passed (score) | ٥                          |         | PDF      | Scoring        |            |
|                    |                   |                    |           | Create Savings Reco  | rd Create      | Contract  | Score Matrix      | Export RFx da | ta Download    | All Responses              | Update  | e awards | Send for       | approval   |

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.



**RFP** Management

| Dashboard ><br>Header | 07654_Architect     | ural Services F<br>Pricing | <b>RFP</b><br>Questionnaire | e Email Templates | Suppliers    | Team    | Reminders         | Communicat   | ion   | Responses | Analysis     | RFP closes i                  | n 22 Minutes, 46 | Seconds [16:18:12] |
|-----------------------|---------------------|----------------------------|-----------------------------|-------------------|--------------|---------|-------------------|--------------|-------|-----------|--------------|-------------------------------|------------------|--------------------|
|                       |                     |                            |                             |                   |              | Docume  | ent Pass Mark: 70 | б            |       |           | _            |                               |                  |                    |
| Search by: S          | Supplier Name 🗸     | Select Sup                 | oplier]                     | Search            | Clear Search | Results |                   |              |       |           |              |                               |                  |                    |
| * Calculated          | Scores Shown        | verall Scores              | ~                           |                   |              |         |                   |              |       |           |              |                               | It               | ems per page: 20 🗸 |
| Name                  |                     | Accessed                   | d? Declined?                | Progress          |              | Respo   | onded? Score      | 100 %) Marks |       |           | -            | Unanswered<br>Mandatory Quest | tions            |                    |
| Bureau Archite        | ect GmbH 🛈          | 1                          |                             | 100.00 %          |              |         | 75.24             | % (158/      | 210)* | OUT       |              | ٥                             | PDF              | Scoring            |
| Magic Designs         | <u>s.a.</u> (i)     |                            |                             | 100.00 %          |              |         | 81.43             | % (171/      | 210)* | Pas       | sed (score)  | ٥                             | PDF              | Scoring            |
| Smith & Sons A        | Architects Ltd. (i) |                            |                             | 100.00 %          |              |         | 89.52             | % (188/      | 210)* | Pas       | sed (score)  | Q                             | PDF              | Scoring            |
|                       |                     |                            |                             |                   |              |         |                   |              |       |           | Score Matrix | Export RF                     | Fx data Dowr     | load 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**

| ave you been authorized                                          | to complete the           | e Technical sect      | tion of this Archite    | ectural services RI   | FP? ·                               |
|------------------------------------------------------------------|---------------------------|-----------------------|-------------------------|-----------------------|-------------------------------------|
| 9 Yes                                                            |                           |                       |                         |                       |                                     |
| D No                                                             |                           |                       |                         |                       |                                     |
| cored: 10 out of 10.<br>Inswered by: Magic Designs S.A.          |                           |                       |                         |                       |                                     |
| here are 10 automatic marks ava<br>Iverride automatic score with | ailable for this question | on. 10 have been awa  | arded.                  |                       |                                     |
| lotes : comments                                                 | 2                         | <u> </u>              |                         |                       |                                     |
| Please ensure that where possib                                  | le all comments are fa    | actual. Where an opir | tion is expressed pleas | ensure that opinion a | //<br>dheres to internal legal guid |

- 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

Calculated score is 10 out of 10

- c) Requires manual scoring
- d) Requires manual assessment
- e) Scores and notes



| Supplier Response                                                                              |                                                                                            |
|------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| Back to documents                                                                              |                                                                                            |
| On Behalf Of : Magic Designs S.A.                                                              | Compare Submission History Download Comments Download Response Import/Export Scoring Sheet |
| Highlight 🛛 Unanswered Mandatory Questions 📄 Required Answer Failure 📄 Requires Manual Scoring | g Requires Manual Assessment CScores and Notes                                             |
| 1. INTRODUCTION 2. TENDER PROCEDURE 3. TECHNICAL SECTION 4. COMMERCIAL                         | AL 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 A         | 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 Pr          | Proposal (RFP) using online eSourcing tool.                                                |

## **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.



#### 8. Please provide 3 references:

Reference 1:

Name \*

| name 1                                                   |                        |                                |                              |                                               |  |  |  |  |  |
|----------------------------------------------------------|------------------------|--------------------------------|------------------------------|-----------------------------------------------|--|--|--|--|--|
| Scored: 10 out of 10.<br>Answered by: Magic Designs S.A. |                        |                                |                              |                                               |  |  |  |  |  |
| There are 10 manual marks avail                          | able for this question | n. 10 1                        |                              |                                               |  |  |  |  |  |
| Notes : great reference                                  |                        |                                |                              |                                               |  |  |  |  |  |
| Please ensure that where possib                          | le all comments are    | factual. Where an opinion is e | expressed please ensure that | opinion adheres to internal legal guidelines. |  |  |  |  |  |
| =                                                        |                        |                                |                              |                                               |  |  |  |  |  |
| Name                                                     | Score                  | Score Date                     | Score Used                   | Notes                                         |  |  |  |  |  |
| Andressa Neves                                           | 10                     | 18 Oct 2020 18:50              |                              | Agree with Jurgita's score                    |  |  |  |  |  |
| Jurgita Andrijauskaite                                   | 10                     | 17 Oct 2020 18:40              |                              | great reference                               |  |  |  |  |  |

#### 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.



|                  | • Sourcing                                                                                                                                                                                                                                                          | JA |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|
| ≡                | Supplier Response                                                                                                                                                                                                                                                   |    |
| ≣<br><b>/</b> ■  | Back to documents                                                                                                                                                                                                                                                   |    |
| t <sub>4</sub> , | 2                                                                                                                                                                                                                                                                   | 1  |
| C°<br>A          | On Behalf Of: Magic Designs S.A. Compare Submission History Download Comments Download Response Import/Export Scoring Sheet<br>Highlight Unanswered Mandatory Questions Required Answer Failure Requires Manual Scoring Requires Manual Assessment Scores and Notes | J  |
|                  | LINTRODUCTION         2. TENDER PROCEDURE         3. TECHNICAL SECTION         4. COMMERCIAL SECTION         5. SUBMISSION DECLARATION                                                                                                                              | -  |
| <u>.</u> •       |                                                                                                                                                                                                                                                                     |    |
| ()<br>()         |                                                                                                                                                                                                                                                                     |    |
| <b>N</b>         | REQUEST FOR PROPOSAL FOR ARCHITECTURAL SERVICES 2020<br>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.                                 |    |
| 1                | Company X hereby invites your firm to submit a proposal in response to Request for Proposal (RFP) using online eSourcing tool.                                                                                                                                      |    |

| Scoring Import/Export                                                                                                       | Free quest | ions marking sheet                                                             |                     |                 |       |              |
|-----------------------------------------------------------------------------------------------------------------------------|------------|--------------------------------------------------------------------------------|---------------------|-----------------|-------|--------------|
| As the owner or moderator of this tender you can import and export scores for any team member.                              | Enter your | marks for each of the manually scored questions in the green 'Score' co        | olumn.              |                 |       |              |
| On Behalf Of: Jurgita Andrijauskaite                                                                                        | Document   | 07654_Architectural Services RFP                                               |                     |                 |       |              |
|                                                                                                                             | Scorer     | Jurgita Andrijauskaite                                                         |                     |                 |       |              |
|                                                                                                                             | Supplier   | Magic Designs S.A.                                                             |                     |                 |       |              |
| export Scoring Sheet                                                                                                        | Number     | Question                                                                       | Answer              | Marks Available | Score | Pass Comment |
| lick on the download button below to download the scoring template for this tender                                          | 1          | INTRODUCTION                                                                   |                     | 0               |       |              |
| hich can be completed and re-imported back in to this tender.                                                               | 2          | TENDER PROCEDURE                                                               |                     | 0               |       |              |
| Download Template                                                                                                           | з          | TECHNICAL QUESTIONS                                                            |                     | 0               |       |              |
|                                                                                                                             |            | Have you been authorized to complete the Technical section of this             | Yes                 | 10              | 10    |              |
| nport Scoring Sheet                                                                                                         |            | Architectural services RFP?                                                    |                     |                 |       |              |
| rowse to the completed scoring sheet and select 'Import Scores' to import them in to<br>is tender for the current supplier. |            | Past Performance                                                               |                     | 0               |       |              |
| Choose File No file chosen Import Scores                                                                                    | 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               | Yes (please attach) | 10              | 10    |              |
|                                                                                                                             |            | Sheet for the past 3 years under your current trading name?                    |                     |                 |       |              |
| Close                                                                                                                       |            | Proposed Resources & Capabilities                                              |                     | 0               |       |              |



#### 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.

| Type Question: Fre | ee Text V Indent: Level 0 V                                                                                                                           | Numbered \Box Reset Numbering 🗆 Mandatory 🗹 |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|
| Question Text:     | ※ 6 圖 圖 國 ← → 9, 9 厚 君・ ∞ ☆ ■ 国 亜 亜 Ω 25 □ 9 Q 43 aa AA Aa<br>B I 5 ダ I <sub>X</sub> 注 二 非 来 17 主 主 圭 ■ Styles - Format - Fort - Size - <u>A</u> - ⊠- |                                             |
|                    | Budget of the project                                                                                                                                 |                                             |
| Character Limit:   | Leave blank for no restriction on length.                                                                                                             |                                             |
| Rows of Text:      | 1 /3                                                                                                                                                  |                                             |
| Score:             | 10                                                                                                                                                    |                                             |
| Assessment:        | Pass by default v 0                                                                                                                                   |                                             |

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.



| On Behalf Of : Magic Desig                                                                                                              | ns S.A.                                                                                       |                                             | Compare                        | Submission History  | Download Comments  | Download Response | Import/Export Scoring Sheet |
|-----------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|---------------------------------------------|--------------------------------|---------------------|--------------------|-------------------|-----------------------------|
| Highlight 🗌 Unanswer                                                                                                                    | ed Mandatory Questions 🛛 Re                                                                   | quired Answer Failure 🛛 Requ                | uires Manual Scoring 🛛 Require | s Manual Assessment | ) Scores and Notes |                   |                             |
| 1. INTRODUCTION                                                                                                                         | 2. TENDER PROCEDURE                                                                           | 3. TECHNICAL SECTION                        | 4. COMMERCIAL SECTION          | 5. SUBMISSION DEC   | CLARATION          |                   |                             |
| Page Start: SUBMISSION D                                                                                                                | ECLARATION                                                                                    |                                             |                                |                     |                    |                   |                             |
| 5 SUBMISSION DECL                                                                                                                       | ARATION                                                                                       |                                             |                                |                     |                    |                   |                             |
| This is the end of the Please ensure you cl                                                                                             | e document. Thank you fo<br>lick <b>"Submit"</b> before navig                                 | or completing.<br>gating away from this pag | ge.                            |                     |                    |                   |                             |
| Overall score provided by y<br>Overall calculated score: 17<br>Total assessment provided<br>Calculated assessment: Par<br>Submit Scores | ou: 171 out of 210 (81.43%, Pass m<br>1 out of 210 (81.43%, Pass mark: 7<br>by you: Pass<br>s | uark: 70.00%)<br>0.00%)                     |                                |                     |                    |                   |                             |

## **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.



|                                  | Sourcing                     |                 |              |                       |                |            |                 |             |                 |                                 |               |                 | JA        |
|----------------------------------|------------------------------|-----------------|--------------|-----------------------|----------------|------------|-----------------|-------------|-----------------|---------------------------------|---------------|-----------------|-----------|
| ≡                                | RFP Management               |                 |              |                       |                |            |                 |             |                 |                                 |               |                 |           |
|                                  | Dashboard > 07654_Architectu | ıral Services R | FP           |                       |                |            |                 |             |                 |                                 |               |                 |           |
| / <u>─</u> ><br>↑ <sub>↓</sub> , | Header Attachments           | Pricing         | Questionnair | e Email Templates     | Suppliers      | Team       | Reminders       | Communicati | ion Responses   | Analysis Jo                     | umal          | P is closed [   | 17:24:46] |
| <b>د</b> ،                       |                              |                 |              |                       |                | Document   | Pass Mark: 70 % |             |                 |                                 |               |                 |           |
| Ø •                              | Search by: Supplier Name 🗸   | [Select Sup     | plier]       | Search                | Clear Search F | Results    |                 |             |                 |                                 |               |                 |           |
| •.                               | * Calculated Scores Shown    | verall Scores   | ~            |                       |                |            |                 |             |                 |                                 |               | Items per page: | 20 🗸      |
| ₽,                               | Name                         | Accessed?       | Declined? Pr | rogress               |                | Responded? | Score (100 %)   | Marks       |                 | Unanswered<br>Mandatory Questic | ns            |                 | Award     |
| 2                                | Bureau Architect GmbH        |                 |              | 100.00 %              |                |            | 75.24 %         | (158/210)*  | OUT             | Q                               | PDF           | Scoring         |           |
| ₩                                | Magic Designs S.A. 🕕         |                 |              | 100.00 %              |                |            | 81.43 %         | (171/210)*  | Passed (score)  | ٥                               | PDF           | Scoring         |           |
| 1                                | Smith & Sons Architects Ltd. | R               | •            | 100.00 %              |                | × 1        | 89.52 %         | (188/210)*  | Passed (score)  | <u>0</u>                        | PDF           | Scoring         |           |
|                                  |                              |                 |              | Create Savings Record | d Create       | Contract   | Score Matrix    | Export RF:  | x data Download | All Responses                   | Update awards | Send for a      | pproval   |

# The Score Matrix output can be exported to Excel:

31.50

50.00

63.00

**RFP** Management

| Dashboard >    | 07654_Archite   | ctural Serv | rices RFP             |             |                            |                 |                  |                      |            |                     |             |                |       |              |
|----------------|-----------------|-------------|-----------------------|-------------|----------------------------|-----------------|------------------|----------------------|------------|---------------------|-------------|----------------|-------|--------------|
|                |                 |             |                       |             |                            |                 |                  |                      | _          |                     |             |                | RFP   | s closed [17 |
| Header         | Attachments     | Pricir      | Questionnaire         | e Email T   | emplates Supplie           | rs Team         | Reminders        | Communication        | Respo      | onses Analysis      | Journa      |                |       |              |
|                |                 |             |                       |             |                            |                 |                  |                      |            |                     | E           | ack to Respon  | ses   | Export Res   |
| Calculated Sc  | ores Shown      |             |                       |             |                            |                 |                  |                      |            |                     |             |                |       |              |
| Group By: Se   | ection Elements | 🗸 🗸 Display | as weighted score 🗹   |             |                            |                 |                  |                      |            |                     |             |                |       |              |
|                |                 | Past P      | erformance (15%)      | Proposed Re | sources & Capabilities (30 | %) Terms of Ref | ference & Repres | entative Tasks (25%) |            | Rates (30%)         | Over        | all (100%)     |       | Rank         |
| Supplier       |                 | Score / 20  | Weighted Score / 31.5 | Score / 50  | Weighted Score / 63        | Score / 90      | Weigh            | ited Score / 52.5    | Score / 40 | Weighted Score / 63 | Score / 210 | Weighted / 210 | Score | Weighted     |
| Bureau Archite | ect GmbH        | 14.00       | 22.05                 | 48.00       | 60.48                      | 71.00           |                  | 41.42                | 15.00      | 23.63               | 158.00      | 147.57         | 3rd   | 3rd          |
|                |                 |             |                       |             |                            |                 |                  |                      |            |                     |             |                |       |              |

78.00

45.50

30.00

47.25

188.00 187.25 1st 1st

Smith & Sons Architects Ltd. 20.00



### 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.

| Questionnaire            | Email Templates            | Suppliers                                                                                                                                                          | Reminders                                                                                                                                      | Communication           | Journal         |                              |                          |              |                     |
|--------------------------|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|-----------------|------------------------------|--------------------------|--------------|---------------------|
|                          |                            |                                                                                                                                                                    | Do                                                                                                                                             | ocument Pass Mark: 30 % |                 |                              |                          |              |                     |
|                          | Search                     |                                                                                                                                                                    | Results                                                                                                                                        |                         |                 |                              |                          |              | Rejected Suppliers  |
| ires 👻                   |                            | _                                                                                                                                                                  |                                                                                                                                                |                         |                 |                              |                          |              | tems per page: 20 💙 |
| nber of suppliers have b | een invited to this event. | Select Su<br>Dest Su<br>Test S<br>Test Su<br>Test S<br>Test Su | polien<br>upplier 1<br>upplier 1<br>upplier 2<br>upplier 2<br>upplier 3<br>upplier 3<br>upplier 4<br>upplier 4<br>upplier 5<br>splier 5<br>>>> |                         | e the search fu | rction, or click the lastion | baloo to view all invite | d suppliers. | Export RF x data    |

#### 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:

#### mediusflow.com



## Supplier score comparison

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

Supplier Response Back to documents Import/Export Scoring Sheet On Behalf Of : Magic Designs S.A. Compare Submission History **Download Comments** Download Response Highlight 🗌 Unanswered Mandatory Questions 📄 Required Answer Failure 📄 Requires Manual Scoring 📄 Requires Manual Assessment Scores and Notes 3. TECHNICAL SECTION 4. COMMERCIAL SECTION 1. INTRODUCTION 2. TENDER PROCEDURE 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.

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





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

| Commen   | s review                                                                                                                                                                 |                     |               |                 |              |         |              |       |      |         |          |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|---------------|-----------------|--------------|---------|--------------|-------|------|---------|----------|
| Readonly | iew of all evaluations.                                                                                                                                                  |                     |               |                 |              |         |              |       |      |         |          |
| Documer  | 07854_Architectural Services RFP                                                                                                                                         |                     |               |                 |              |         |              |       |      |         |          |
| Suppror  | nigo beagos bes                                                                                                                                                          |                     |               | 1               |              |         | Aaron Asvadi |       |      | Andres  | sa Neves |
| Number   | Question                                                                                                                                                                 | Answer              | irks Availabl | e culated Score | alculated Pa | Comment |              | Score | Pass | Comment | 5        |
| 2        | TENDER PROCEDURE                                                                                                                                                         |                     |               | 0               |              |         |              |       |      |         |          |
| 3        | TECHNICAL QUESTIONS                                                                                                                                                      |                     |               | o               |              |         |              |       |      |         |          |
|          | Have you been authorized to complete the Technical section of<br>this Architectural services REP?                                                                        | Yes                 | 1             | 10 10           |              |         |              | 10    |      |         |          |
|          | Past Performance                                                                                                                                                         |                     |               | 0               |              |         |              |       |      |         |          |
| 1        | Was your annual turnover no less than CHF 250,000.00 for the<br>last three years?                                                                                        | Yes                 | 1             | 10 10           | )            |         |              |       |      |         |          |
| 2.       | Are you able to provide Balance Sheet or Extracts from a<br>Balance Sheet for the past 3 years under your current trading<br>name?<br>Pernorsed Resources & Canabilities | Yes (please attach) | 1             | 10 10           |              |         |              |       |      |         |          |
| 3.       | Do you agree to the proposed contract Terms and Conditions<br>attached?                                                                                                  | Yes                 |               | 10 10           |              |         |              |       |      |         |          |
| 4.       | Do you have Professional Indemnity Insurance?                                                                                                                            | Yes (please attach) | 1             | 10 10           |              |         |              | 10    |      |         |          |
| 5.       | Do you have Public Liability Insurance?                                                                                                                                  |                     | 1             | 0 0             |              |         |              |       |      |         |          |
| 6.       | Have you paid your social security dues?                                                                                                                                 | Yes                 | 1             | 10 10           |              |         |              |       |      |         |          |
| Z.       | Are you able to supply and agree to the attached Scope of<br>Bequirements?                                                                                               | Yes                 |               | 10 10           |              |         |              |       |      |         |          |
|          |                                                                                                                                                                          |                     |               |                 |              |         |              |       |      |         |          |

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



| Ploase select the                        | options below to configure your download for this event                                                                |
|------------------------------------------|------------------------------------------------------------------------------------------------------------------------|
| riedse select the                        | options below to conligure your download for this event.                                                               |
| Would you like<br>including part         | to download only submitted responses or all responses<br>ially saved ones?                                             |
| 🔘 A                                      | II Responses                                                                                                           |
| Os                                       | ubmitted Responses Only                                                                                                |
| Should attach<br>attachments b<br>G<br>G | ments be grouped by question, or all of the supplier's<br>e in a single folder<br>roup by Question<br>roup 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.



| RFP Management                   |               |             |                      |                |            |                 |                |                |                           |                |            |                |           |
|----------------------------------|---------------|-------------|----------------------|----------------|------------|-----------------|----------------|----------------|---------------------------|----------------|------------|----------------|-----------|
| Dashboard > 07654_Architectur    | al Services F | RFP         |                      |                |            |                 |                |                |                           |                | RI         | P is closed    | 17:56:53] |
| Header Attachments               | Pricing       | Questionnai | re Email Templates   | Suppliers      | Team       | Reminders       | Communication  | Responses      | Analysis                  | Journal        |            |                |           |
|                                  |               |             |                      |                |            |                 |                |                |                           |                |            |                |           |
|                                  |               |             |                      |                | Document   | Pass Mark: 70 % |                |                |                           |                |            |                |           |
|                                  |               |             |                      |                |            |                 |                |                |                           |                |            |                |           |
| Search by: Supplier Name 🗸       | [Select Sup   | oplier]     | Search               | Clear Search R | Results    |                 |                |                |                           |                |            |                |           |
|                                  |               |             |                      |                |            |                 |                |                |                           |                |            |                |           |
| Calculated Scores Shown     Over | erall Scores  | ~           |                      |                |            |                 |                |                |                           |                |            | Items per page | 20 🗸      |
| Name                             | Accessed?     | Declined?   | Progress             |                | Responded? | Score (100 %)   | Marks          |                | Unanswered<br>Mandatory ( | 1<br>Questions |            |                | Award     |
| Bureau Architect GmbH            |               |             | 100.00 %             |                |            | 75.24 %         | (158/210)* OU  | т              | ۵                         |                | PDF        | Scoring        |           |
| Magic Designs S.A.               |               |             | 100.00 %             |                |            | 81.43 %         | (171/210)*     | Passed (score) | <u>0</u>                  |                | PDF        | Scoring        |           |
| Smith & Sons Architects Ltd, 🛈   |               |             | 100.00 %             |                |            | 89.52 %         | 4 /210)*       | F 5 score)     | ٥                         |                | PDF        | Scoring        |           |
|                                  |               |             | Create Savings Recor | rd Create (    | Contract   | Score Matrix    | Export RFx dat | ta Download    | All Response              | es Upda        | ite awards | Send for a     | pproval   |

## 4.Export RFx Data:

5. Download All Responses (please see section 3 above)

|                |                                                                                                                                    |                       |                        |                         |                              | Download Responses                                                        |
|----------------|------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------------------|-------------------------|------------------------------|---------------------------------------------------------------------------|
| ime of Report: | 05 June 2021 17:00:12                                                                                                              |                       |                        |                         |                              | Please select the options below to configure your download for this event |
| RFX Answer     | s                                                                                                                                  |                       |                        |                         |                              |                                                                           |
| lumber         | Question                                                                                                                           | Max ScoreOn Behalf Of | : Bureau Archite       | ct 🤇 Magic Designs S.A. | Smith & Sons Architects Ltd. | Would you like to download only submitted responses or all responses      |
|                | INTRODUCTION                                                                                                                       |                       |                        |                         |                              | including partially saved ones?                                           |
|                | TENDER PROCEDURE                                                                                                                   |                       |                        |                         |                              |                                                                           |
|                | TECHNICAL QUESTIONS                                                                                                                |                       |                        |                         |                              | <ul> <li>All Responses</li> </ul>                                         |
|                | Have you been authorized to complete the<br>Technical section of this Architectural services                                       | Answer                | Yes                    | Yes                     | Yes                          | Submitted Responses Only                                                  |
|                | REPP                                                                                                                               | 10 Score              | 10                     | 10                      | 10                           | Should attachments be grouped by question, or all of the supplier's       |
|                |                                                                                                                                    | Rank                  | 1                      | 1                       | 1                            | attachments be in a single folder                                         |
| - 1.           | Was your annual turnover no less than CHF<br>250.000.00 for the last three years?                                                  | Answer                | No                     | Yes                     | Yes                          | Group by Question                                                         |
|                |                                                                                                                                    | 10 Score              | 6                      | 10                      | 10                           | O Crown by Crown For                                                      |
|                |                                                                                                                                    | Rank                  | 2                      | 1                       | 1                            | Group by Supplier                                                         |
| - 2.           | Are you able to provide Balance Sheet or<br>Extracts from a Balance Sheet for the past 3<br>years under your current trading name? | Answer                | Yes (please<br>attach) | Yes (please attach)     | Yes (please attach)          |                                                                           |

# 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)