Quick Reference Guide

CALUSOURCE
Collaborative Procurement

Creating a Scorecard

Scorecards provide a way to analyze the scores given by evaluators on Supplier responses to questionnaires and price sheets. An event's scorecards can be created once questionnaires and price sheets have been created and evaluators have been selected.

At this point the system will automatically compile the scores and create a Default scorecard. You can create multiple scorecards based on different scenarios for analysis.

Instructions for Analyzing Scores

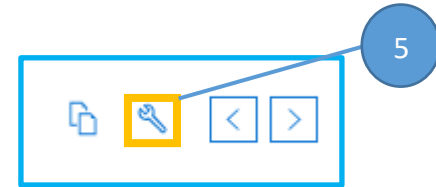1. Click the **Actions** icon and then, click **Score Card** from the list.

2. The **Default** Scorecard will display. (You cannot edit or delete the Default Scorecard.

3. To create a new custom Scorecard, click **Create Scorecard** from the left pane.

4. Enter a name/title for your new Scorecard and click **ADD** and then click **OK** in the **Success message.**

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5. To make changes to any weight assigned to an evaluator, questionnaire or price sheet, click the **Manage Weights** icon.

6. Adjust the **Questionnaire Weight** and **Price Sheet Weight** as necessary by clicking the number below each and typing the new % weight.
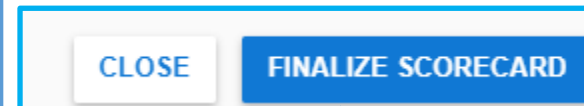
7. If there is more than one questionnaire, you can modify the weights assigned to each individual questionnaire as well as any price sheets within your RFx by clicking **Questionnaire** or **Price sheet** and then make adjustments to the weights.

8. Adjust the weight for each evaluator by first clicking the **Lock** icon to unlock and then assign the desired weight.

9. If you have more than one Questionnaire or Price Sheet, you will see it listed in the left pane. Simply click on the **Lock** icon for the Questionnaire or Price Sheet you wish to change to unlock it and then assign the desired weight.

10. When finished assigning your price sheet or questionnaire weights, click the **Done** button.

11. Click the **Finalize Scorecard** button to finalize the scorecard.

Questionnaire Weight (%)
50

Price sheet Weight (%)
50

QUESTIONNAIRE   PRICESHEET

Questionnaire	Weight (%)	Sara Kayser	Nick Bowerman
	100%		
	100%	20 🔒	20 🔒
Financials	33.333 🔒	✓	✓
sustainability	33.334 🔒	✓	✓
Product Information	33.333 🔒	✓	✓

CANCEL DONE

CLOSE FINALIZE SCORECARD

Tips

- You cannot edit the weight in the Default Scorecard. You would need to first copy the Default Scorecard and make the change on the copied scorecard, or create a new scorecard and adjust your weights as desired. See Steps 4-5 above.

- It is recommended to keep the weights the same for each evaluator so as not to create an unfair condition for the suppliers. You may have to adjust an evaluator's weight to 0% if he/she is no longer an evaluator for the event. You would then need to distribute the remaining weight % to the other evaluators.

- You can click the **Auto Weight** button to distribute the weight equally over questionnaires, prices sheets, and evaluators.

- The ✓ icon indicates that the questionnaire/price sheet is assigned to that evaluator for evaluation. The -- icon shows that the questionnaire/price sheet is not assigned to that evaluator for evaluation.

Warnings

- The evaluation criteria as well as the corresponding weights for price sheets and questionnaires should be established prior to an event opening. Changes should only be made to the weights if noted in an official RFx amendment that is distributed to the suppliers prior to the event closing. Failure to adhere to this could result in a supplier protest and/or litigation.