

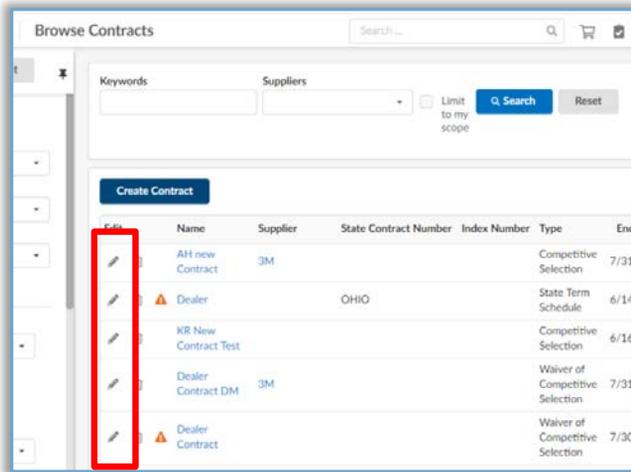
Step-by-Step Instructions for Creating a Performance Evaluation

1

Log in to Ohio Buys. From the Main Menu Navigation Bar, click **Contracts** and then select **Browse Contracts** from the drop-down menu.

Performance Evaluations (PE) are initiated by Contract Analysts and can be created from a Determination & Recommendation (D&R) or Supplier Performance template. In this example, we will create a D&R since it is the most common type of PE. A D&R is comprised of questions used to determine whether or not to renew a contract with a Supplier. Since a D&R is created from a contract, find the relevant contract and click the **Pencil** (✎) icon next to it.

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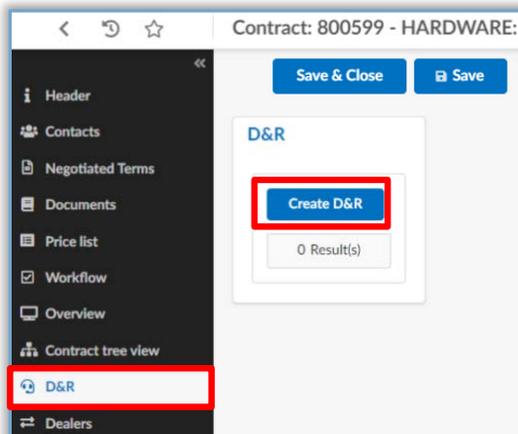


- ▲ A Supplier Performance template is comprised of questions regarding a Supplier's delivery performance, invoicing, and personnel. If you would like to create a Supplier Performance PE, click **Suppliers** from the Main Navigation Menu Bar and select **Performance Evaluation**. Then, click **Supplier Performance** to create a Supplier Performance PE.

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From the Header page of the contract, navigate to the **D&R Tab** and then click **Create D&R** to create a new D&R.

- ▲ If a D&R was previously created for this specific contract, it would be listed on this page.



Step-by-Step Instructions for Creating a Performance Evaluation

- a) Review the pre-populated fields (e.g., Type, Campaign, Owner, Begin Date, Suppliers, Contract) for accuracy and edit them as necessary.
 - Begin Date: This automatically populates to the date the D&R was created.
- b) Populate the mandatory **End Date** field:
 - End Date: The date the D&R will close for evaluation.
- c) Populate the non-mandatory fields (e.g., Organization, Commodity) as necessary.
- d) Click **Save**.

The screenshot shows a web form titled "Campaign" with a search bar at the top right. A blue "Save" button is located at the top center. The form is divided into several sections:

- Section A:** Fields for "Type" (Information Request), "Status" (Draft), "Begin Date" (6/17/2019), and "End Date" (empty). The "End Date" field is highlighted with a blue box and callout B.
- Section B:** Fields for "Campaign" (Determination & Recom...), "Owner" (ADMIN State), and "Description" (empty).
- Section C:** Fields for "Organization" and "Commodity" (both empty). These fields are highlighted with a blue box and callout C.
- Section D:** Field for "Suppliers" (SNAP-ON INDUSTRIAL).

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Now, after clicking Save, multiple tabs appear on the left side of the page:

- General Information tab: Review and edit as necessary (e.g., the Begin Date, End Date, Owner, Description, Organization, Commodity, Supplier). Scroll down to view the status and information on when the D&R was modified and the type of modification.
- Questionnaire tab: The sections and sub-sections of questions associated with the Performance Evaluation are visible and editable. Within the D&R, there are sections for Annual Expenditure, Recommendations, Terms of Contract, Strategic Sourcing, Vendor Performance, Contract Needs, and Agency's Recommendation.
- Answers tab: You can search for a list of respondents and the status of their responses.
- Respondents tab: This is where you indicate the respondents for each section(s) of the questionnaire. Specific steps for this tab are included in Step 6.
- Workflow tab: Displays where the D&R is in the process workflow. Once a D&R has been initiated, it is sent to the selected respondents that have used the contract. Once the D&R is closed, the primary Contract Analyst provides their recommendation (i.e., to renew or not renew a particular contract) and their Procurement Manager finalizes the D&R.

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The screenshot displays the 'Information Request : Determination & Recommendation' form. On the left, a navigation sidebar is visible with the following tabs: Gen. Info, Questionnaire, Answers, Respondents, Workflow, and Comparison. The main form area contains the following fields and controls:

- Buttons:** Save, Open for Answers, Duplicate Campaign
- Type:** Information Request
- Status:** Draft
- Begin Date:** 6/17/2019
- End Date:** 7/31/2019
- Answers Received:** 0%
- Campaign:** Determination & Reco... (en)
- Owner:** ADMIN State
- Description:** D&R 123456 (en)
- Attached file:** Click or Drag to add a file
- Organization:** [Dropdown]
- Commodity:** [Dropdown]
- Suppliers:** [Dropdown]

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- a) Within the Respondents tab, complete the **For**, **Assign**, **And**, and **Or** fields. Indicate the respondent and the questionnaire section(s) they should complete:
- **For**: Select the associated Supplier from the drop-down menu.
 - **Assign**: Select the respondents you would like to complete the questionnaire section(s).
 - **And**: Select the section(s) from the drop-down menu you want the respondent to complete.
 - **Or**: Select a specific role if you do not want to assign a questionnaire section(s) to a specific individual. In most scenarios, you will use the **Assign** field instead of this field.

The screenshot shows the 'Information Request : Determination & Recommendation' interface. The 'Default respondents rules' section is highlighted with a red box. It contains four dropdown menus: 'For' (set to 'All selected objects'), 'Assign' (set to 'A respondent'), 'and' (set to 'All Sections'), and 'Or' (set to 'A role'). Below this, the 'Responders Assigned' section includes search filters for 'Keywords' and 'Select Team', a 'Missing respondents' checkbox, and 'Search' and 'Reset' buttons. A table below shows a list of suppliers, with 'SNAP-ON INDUSTRIAL' visible under the 'Suppliers' column.

- b) Click **Add the Rule**.
- ▲ Once you click Add the Rule, your selections are saved and you can see who will complete which questionnaire section(s) and for which contract or Supplier.
 - ▲ If you would like to add additional respondents, complete the same process for each respondent.
 - ▲ Within the Responders Assigned box, you can determine if each D&R questionnaire section has been assigned a respondent as well as which respondents have been assigned to which section(s).
- c) Click **Save**.

Once you complete the pre-populated and mandatory fields within each tab, click **Open for Answers**.

- ▲ An email will be sent to each respondent to complete their questionnaire section(s).

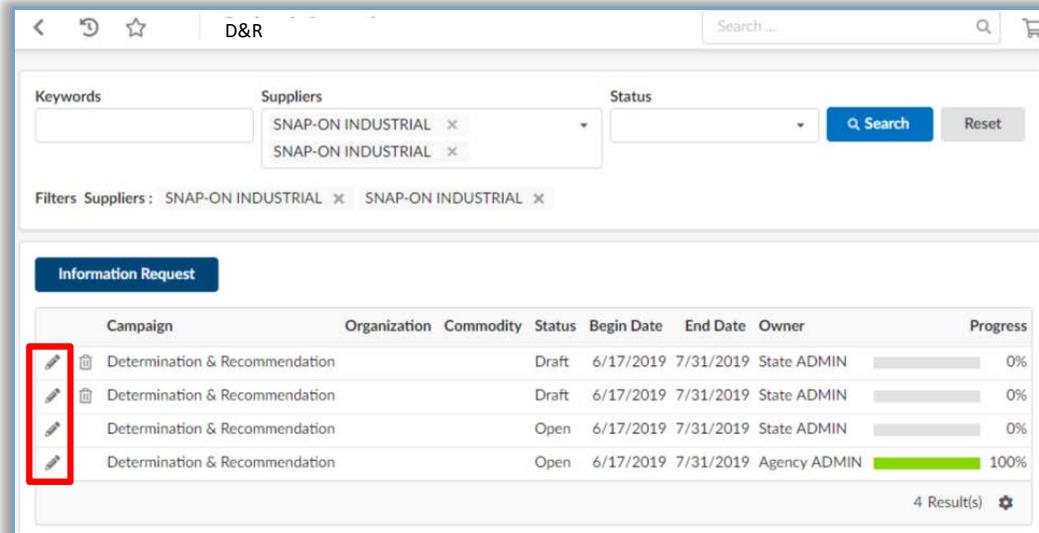
Step-by-Step Instructions for Finalizing a Performance Evaluation

1

Log in to Ohio Buys. From the Main Menu Navigation Bar, click **Suppliers** and then select **D&R** from the drop-down menu.

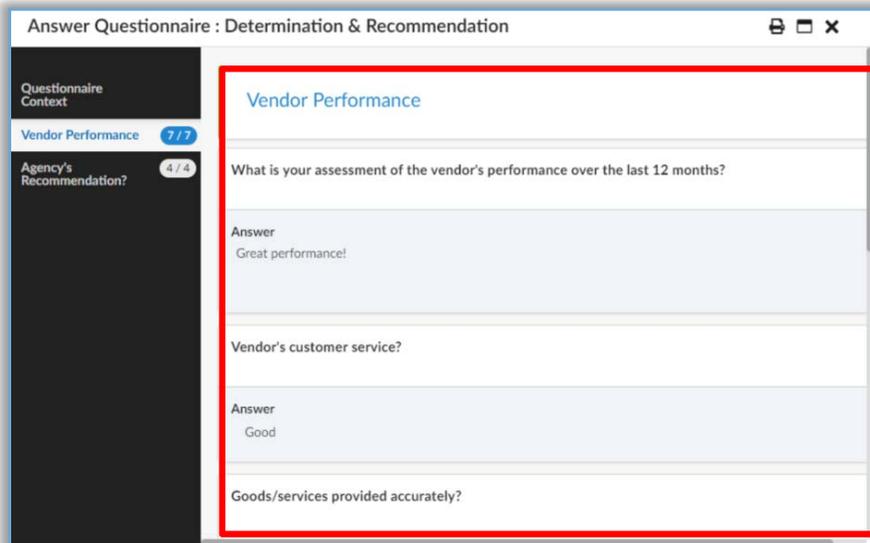
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Find the relevant Determination & Recommendation (D&R) by searching for the applicable Supplier. From the Results Page, click the **Pencil** (✎) icon next to the relevant D&R.



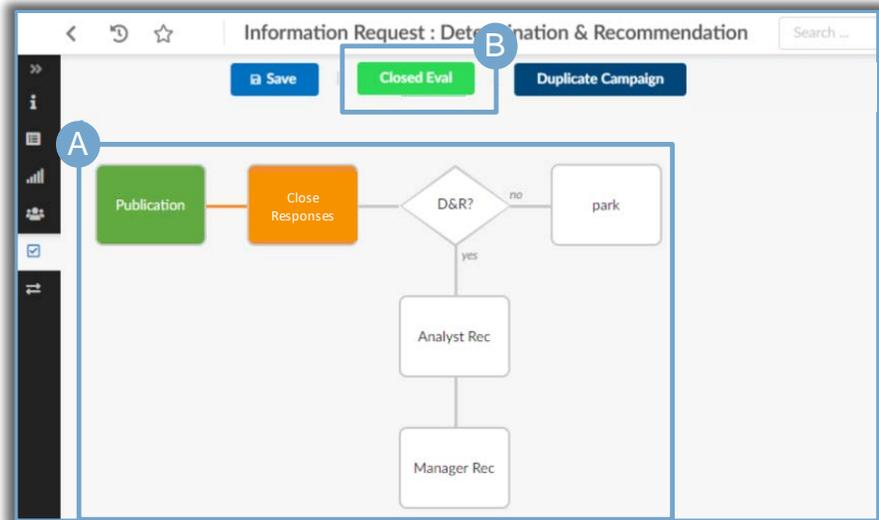
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- Click on the **Answers** tab. A list of respondents assigned to complete the questionnaire section(s), their completion progress, and the status of their responses is visible. Ensure each respondent's progress shows 100% completed and their status shows as **Approved**.
- To review a respondent's specific responses, click the **Pencil** (✎) icon next to their name to navigate between the tabs on the left and scroll through their responses on the right. Once reviewed as necessary, click the **X** (✕) icon.



Step-by-Step Instructions for Finalizing a Performance Evaluation

- a) After reviewing the respondents' responses, click on the **Workflow** tab to review the workflow as necessary.
- b) Click **Closed Eval** after you complete your review.
- c) In the subsequent pop-up, click **Ok** to confirm your submission.



- ▲ Once the individual responsible for creating and opening the D&R clicks Closed Eval, an email notification is sent to the applicable Contract Analyst to either approve or reject the D&R (i.e., either recommend or not recommend the contract for renewal).
- ▲ Once the applicable Contract Analyst approves or rejects the D&R, an email notification is sent to the applicable Procurement Manager for a final review in which they approve or reject the D&R.
- ▲ Once the applicable Procurement Manager confirms their final decision, the D&R will be visible on the D&R page.