Ohio Buys

v2

How to Create a Performance Evaluation (PE) Template

Step-by-Step Instructions for Creating a Performance Evaluation Template

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

- ⚠ In Ohio Buys, performance evaluations (PEs) are known as questionnaire templates, which are predefined questionnaires with sections, sub-sections, and scoring questions.
- ⚠ Questionnaire templates, or PEs, have a type, an owner, and can be linked to an organization and/or commodity as necessary, and they are comprised of a questionnaires with default rules for respondent assignments (i.e., evaluator assignment).
- ⚠ New PE templates are commonly created by copying and modifying an existing PE template, but can also be created from scratch or imported from an Excel file.

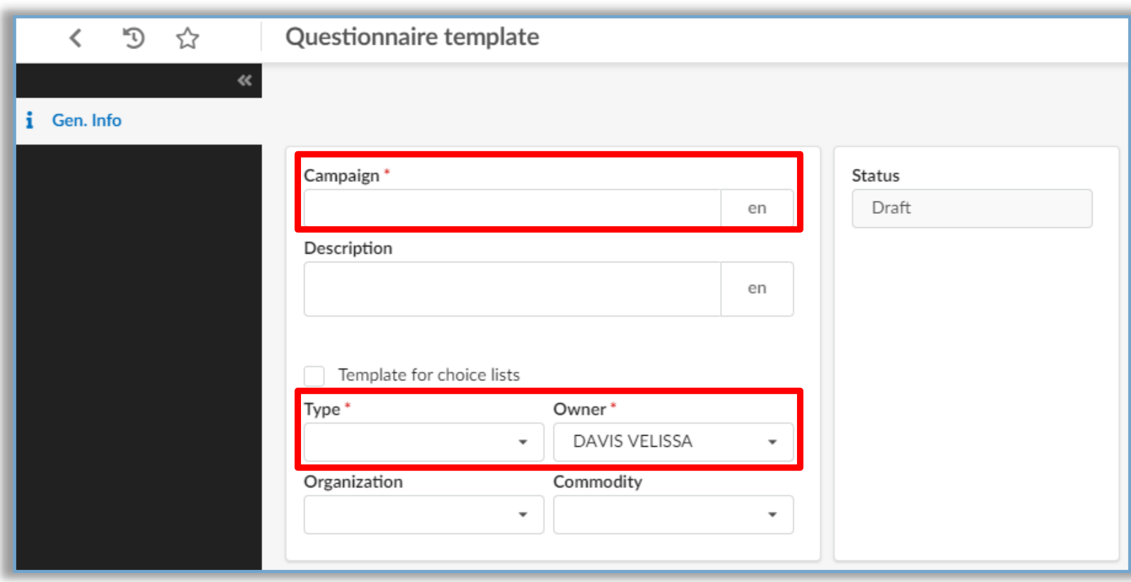
2

Click **Create a New Template.**

3

a) Complete the mandatory **Campaign**, **Type**, and **Owner** fields:

- Campaign: The specific name of the PE (e.g., Determination and Recommendation)
- Type: The type of the PE must be consistent with the object you are creating the template for and the purpose of the PE template:
  - Sourcing PEs: Gather Requirements and Proposals Evaluation
  - Supplier PEs: Information Request, Supplier Performance, Supplier Risk, and Order Performance
  - Contract PEs: Contract Performance and Contract Risk Assessment
- Owner: The person responsible for creating and managing the PE template.
  - ⚠ This defaults to you as you are the creator, but it can be changed as necessary.



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b) Complete the non-mandatory fields as necessary:

- Description: A description of the PE template.
- Organization: The organization(s) the PE template is applicable to.
- Commodity: The commodity(ies) the PE template is applicable to.

c) Click **Save**.

⚠ Once you click Save, the Questionnaire and Workflow tab become visible:

- Questionnaire tab: Allows you to create the questionnaire form with sections and sub-sections and define default respondent (i.e., evaluator) assignment rules.
- Workflow tab: Gives you all the information on where the template stands in its approval workflow.

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Navigate to the **Questionnaire** tab.

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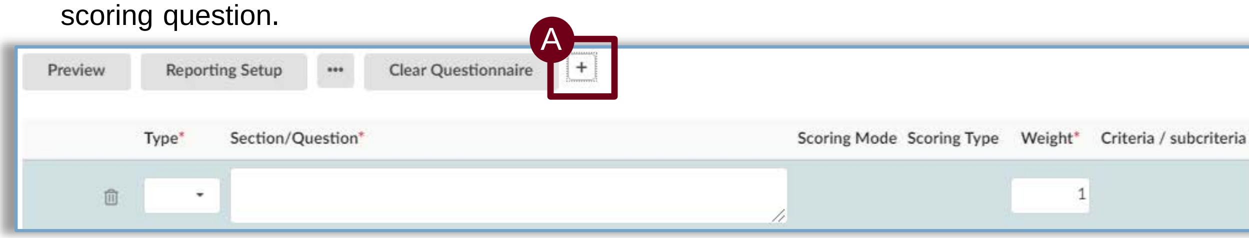
a) On the Questionnaire header, click the **Plus** (+) icon to create a section, sub-section, or scoring question.



⚠ Each click will create a row within a grid, but you can remove or add rows (i.e., sections, sub-sections, or scoring questions) at any time as necessary.

⚠ PEs should be organized into sections, which become a tab when viewed by evaluators.

- If you do not use sections, each scoring question will be on the same page as opposed to tabs.
- If you use sections, each question must be attached to a section.
- Sub-sections should be used to better organize each section by grouping scoring questions according to a specific topic.

⚠ Since each section, sub-section, and scoring question is counted individually, click the Plus icon as many times as there are sections, sub-sections, and scoring questions within your PE (e.g., if you will have 7 sections, 0 sub-sections, and 23 scoring questions then click the Plus icon 30 times).

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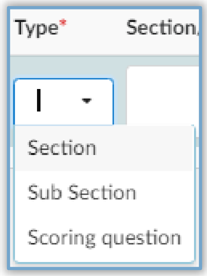
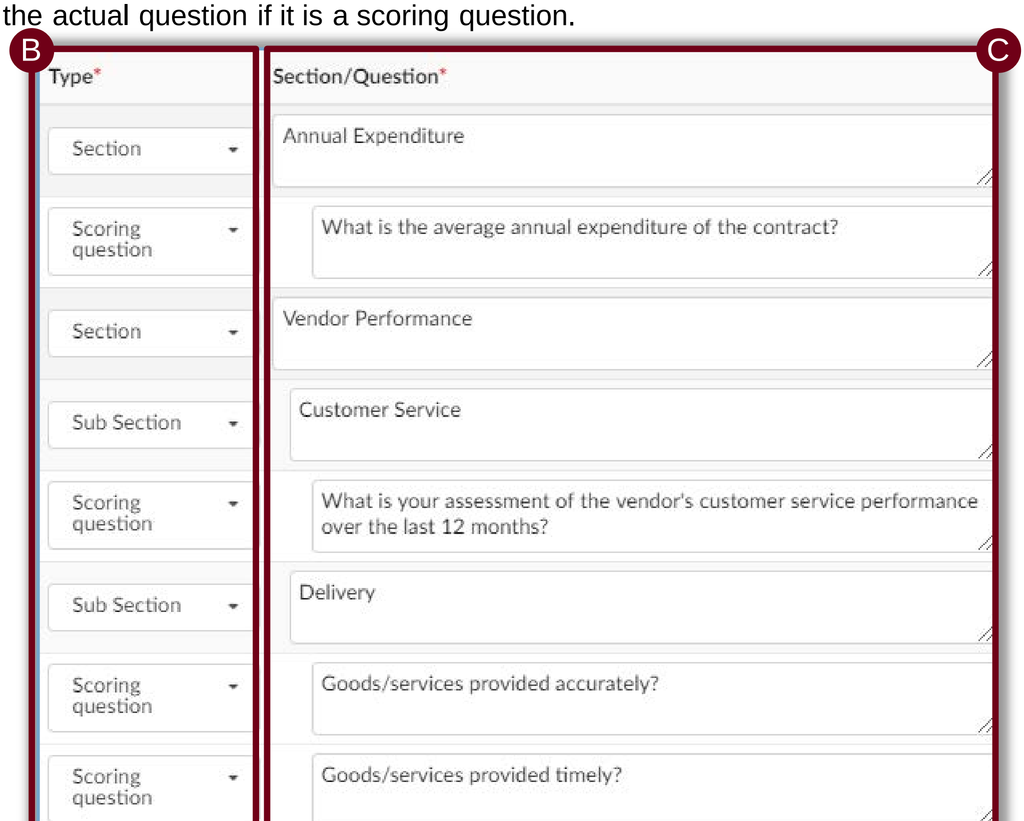
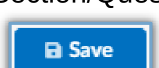
b) In the **Type** column, for each row, indicate whether it is a section, sub-section or scoring question.



c) In the **Section/Question** column, for each row, input the title of the section or sub-section or the actual question if it is a scoring question.



d) Once you complete the Type and Section/Question columns, click **Save.**



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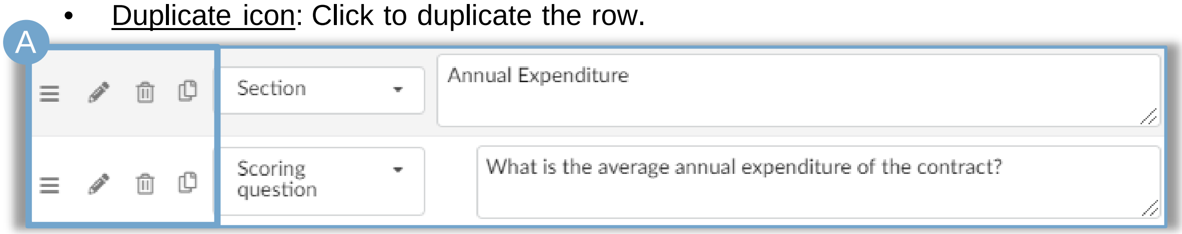
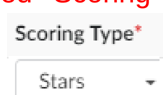
a) For each row (i.e., section, sub-section, and scoring question), there are **Menu Bar** (☰), **Pencil** (✎), **Trash** (🗑), and **Duplicate** (⧉) icons:

- Menu Bar icon: Click and drag to reorder the rows by moving it up or down.
- Pencil icon: Click to edit the associated row's settings (e.g., customized list of values).
- Trash icon: Click to delete the associated row.
- Duplicate icon: Click to duplicate the row.



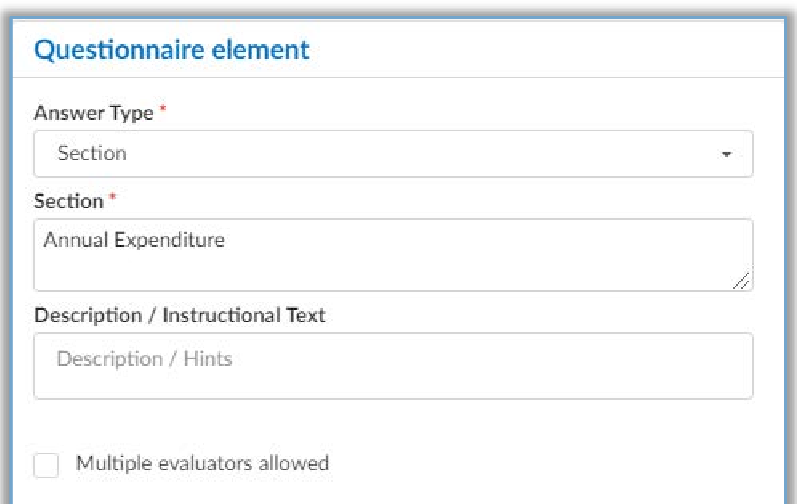
Note that the column currently labeled "Scoring Type" is really "Display mode":



b) For each row (e.g., section, sub-section, and scoring question), click the **Pencil** (✎) icon next to the associated row to review and adjust the row's settings as applicable. Step B continued on Page 5.

1) Questionnaire element box: Outlines the Answer Type (Section, Sub-Section, or Scoring question), the specific name of the section, sub-section, or scoring question as well as a description or instructional text and the option to indicate if multiple evaluators are allowed.

Example for a Section or Sub Section row:



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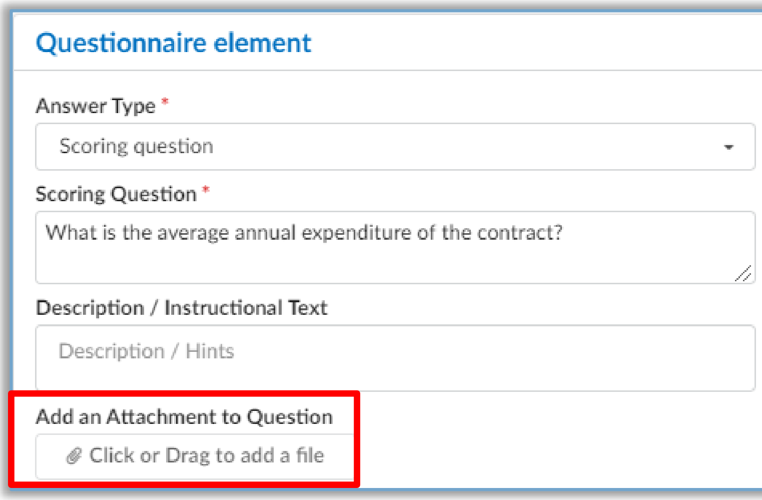
Example for a Scoring question row:

▲ Note that for Scoring question rows there is the option to add an attachment to the question if desired.

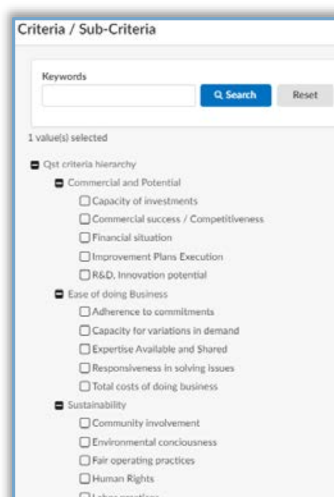


2) Scoring Parameter box: Outlines the format of the answers and associated scoring, weighting and other attributes of each row.

Example for a Section or Sub Section row:

Criteria / subcriteria is a mandatory field

TBD – why would there be a criteria associated with a section header when this is not a question answered by the respondents??? Selection options:



Eliminatory score – optional but TBD this wouldn't be relevant at the section header level either

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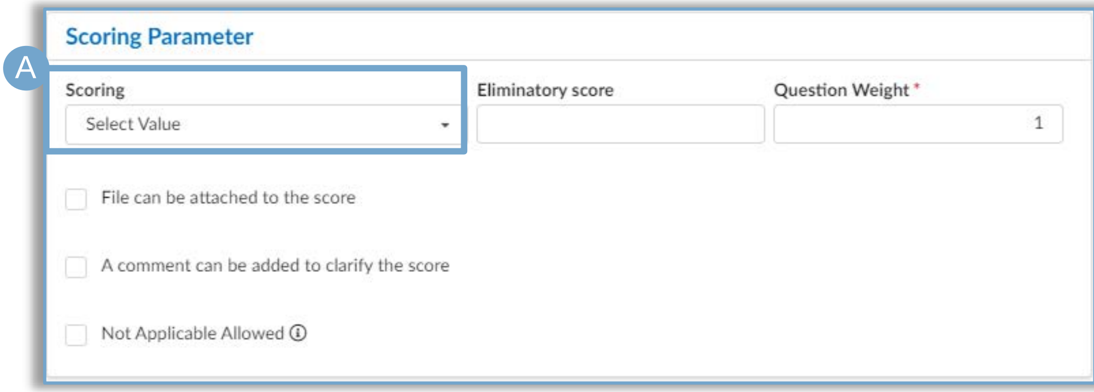
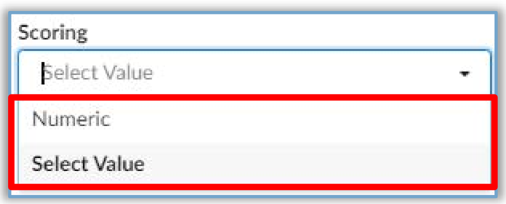
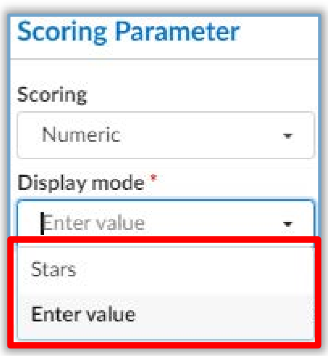
Example for a Scoring question row:



A) **Scoring**: Select an option (either **Numeric** or **Select Value**) using the drop-down list



i) If **Numeric** is selected you will also be prompted to select a **Display mode** (either Stars or Enter Value)



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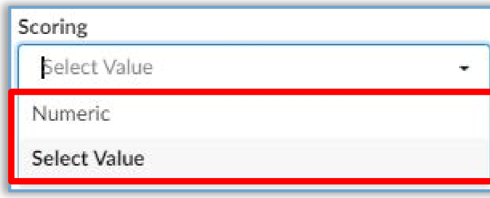
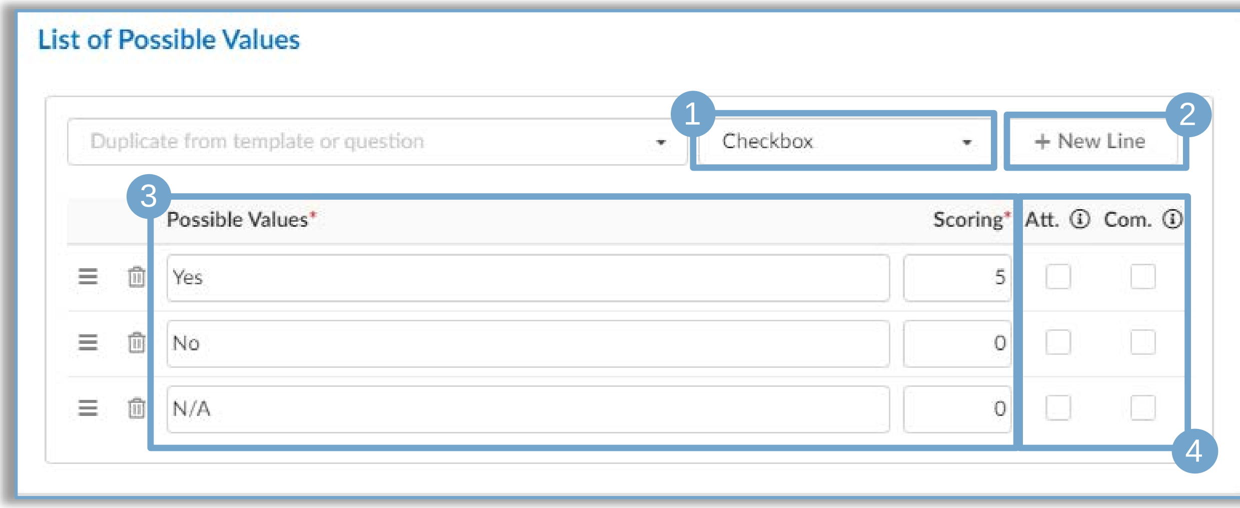
ii) If **Select Value** is selected the List of Possible Values pane will be visible, which enables you to create and/or view a customized list of values.





1) Within the **Drop-Down List** field, determine how you want the list of values or the prospective answers to appear to the evaluators. Choose the applicable option from the drop-down menu (e.g., Stars, Radio Buttons, Buttons, Checkbox, Dropdown List).

2) Click **New Line** to create a row for each value or prospective answer (e.g., if you want an evaluator to choose between Yes, No, or N/A for a specific question, click this three times). Based on the number of times you click New Line, an individual row appears for each value or prospective answer.

3) For each row, populate the **Possible Values** column with value or prospective answer (e.g., Yes, No, N/A), and the associated Scoring for each value.

4) For each row, click the **Checkbox** ( ) icon in the **Att.** column if the evaluator must include an attachment or in the **Com.** column if the evaluator must include a comment.

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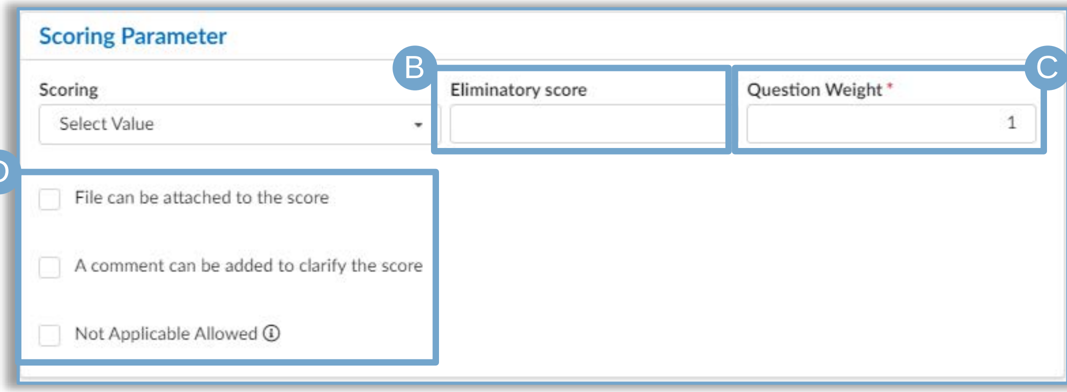
Once the Scoring field has been completed, populate the other fields on the Scoring Parameter box as necessary.



B) **Eliminatory score** (optional): Need to understand & then explain what this is

C) **Question Weight**: Need to understand & then explain what this is

D) Tick the associated checkbox to indicate if:

- An evaluator is able to attach a file to the question during their rating
- An evaluator is able to add a comment to the question during their rating
- An answer of 'Not Applicable' is allowable for this question

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Click **Save** and then click **Submit**.

- ▲ Once you click Submit, the new PE template will be routed to an Agency Admin for review.
- ▲ Once the Agency Admin clicks Activate, the new PE template becomes available for applicable users to create and finalize a PE.

- ▲ For instructions on creating and finalizing a PE, please consult the *Creating and Finalizing Performance Evaluations* training course or the *Create and Finalize a Performance Evaluation* job aid.