



Vendor Evaluation



Purpose & Procedure

- ▶ The Vendor Evaluation is a business process that gives Project Managers, Owners and Owner's Agents the ability to record evaluations of vendors' performance on the project.
- ▶ This record has 2 workflow options: Vendor Evaluation (Create & End) and Request Evaluation (Send to User to Complete)

- ▶ Vendor Evaluation Workflow
Created by: **Project Manager, Owner Representative, Owner's Agent** → Submitted to: **END**

- ▶ Request Evaluation Workflow
Created by: **Project Manager, Owner** → Submit to: **Any User** → Submitted to: **END**



Vendor Evaluation Creation

- ▶ In OAKS CI navigate to:
 - ▶ Logs -> Vendor Evaluation
 - ▶ Click Create
 - ▶ Choose appropriate Workflow

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar shows 'ORACLE PRIMAVERA Unifier (Development)' and 'Agency OAKS CI Trainin...'. The left sidebar menu is open, with 'Logs' highlighted in a red circle. A red arrow points from the 'Logs' menu item to the 'Vendor Evaluation' item in the main content area. The 'Vendor Evaluation' item is also highlighted in a red box. The main content area shows a 'Vendor Evaluation' header with a '+ Create' button and a 'Request Evaluation' button, both highlighted in a red box. The bottom right corner of the interface shows 'Total: 96'.



Complete General Information

- ▶ Complete information in “General” and “Vendor Information” Sections
 - ▶ Fields marked with a red * are required

The screenshot shows a web browser window with the title "Create New Vendor Evaluation - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uve/1003/172747?_uref=uuu813276850t1". The page title is "Create New Vendor Evaluation".

The form is divided into two main sections, both highlighted with red boxes:

- General:** This section contains the following fields:
 - Organization: OAKS CI Test
 - Project Number: OCI-080001
 - Project Name: Agency General Projects Test
 - Project Location: (empty)
 - Title *: Joe's Contractor Evaluation
 - Record Number: (empty)
 - Creator: Matthew Weber
 - Creation Date: (empty)
 - Status: (empty)
 - Vendor Name: OCI Test General
- Vendor Information:** This section contains the following fields:
 - Type *: Contract
 - Professional Service Provider: (empty)
 - Contractor *: OCI Test General
 - Subcontractor/ Supplier Declaration: (empty)
 - Agreement Type: (empty)
 - Trade: General Contractor
 - Services/Material Brands: (empty)

On the right side of the form, there is an "Attachments" section with a "Com" button and a "No Attachments" message.



Complete General Information

- ▶ Complete information in “General” and “Vendor Information” Sections
 - ▶ Fields marked with a red * are required

The screenshot shows a web browser window with the title "Create New Vendor Evaluation - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uve/1003/172747?_uref=uuu813276850t1". The page title is "Create New Vendor Evaluation" with "Send Save" and a menu icon in the top right. The "General" section is highlighted with a red box and contains the following fields: Organization (OAKS CI Test), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location, Title * (Joe's Contractor Evaluation), Record Number, Creator (Matthew Weber), Creation Date, Status, and Vendor Name (OCI Test General). The "Vendor Information" section is also highlighted with a red box and contains: Select One, Type * (Contract), Professional Service Provider, Contractor * (OCI Test General), Subcontractor/ Supplier Declaration, Agreement Type, Trade (General Contractor), and Services/Material Brands. On the right side, there is an "Attachments" section with a "Com" button and a "No Attachments" message.



Complete General Information

- ▶ When the record is ready to move forward, click **Send**

The screenshot shows a web browser window with the title 'Create New Vendor Evaluation - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uve/1003/172747?__uref=uuu813276850t1'. The page title is 'Create New Vendor Evaluation'. In the top right corner, there are buttons for 'Send' and 'Save', with 'Send' circled in red and a red arrow pointing to it. Below the title is a 'General' tab. The form is divided into two main sections: 'General' and 'Vendor Information'. The 'General' section includes fields for Organization (OAKS CI Test), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location, Title (Joe's Contractor Evaluation), Record Number, Creator (Matthew Weber), Creation Date, Status, and Vendor Name (OCI Test General). The 'Vendor Information' section includes a 'Select One' dropdown for Type (Contract), Professional Service Provider, Contractor (OCI Test General), Subcontractor/ Supplier Declaration, Agreement Type, Trade (General Contractor), and Services/Material Brands. On the right side, there is an 'Attachments' section with a paperclip icon and a message: 'Information No Attachments.'



If using “Request Evaluation”

- ▶ If you’re using the “Request Evaluation” workflow, then at this point you will send it to the user you want to complete the evaluation
- ▶ Note that the “Request Evaluation” workflow action has already been selected
- ▶ Select the “To” button to choose who you want to send the evaluation to for completion then Click Send

The screenshot displays the Oracle Fusion CRM interface for creating a new vendor evaluation. The main window is titled "Create New Vendor Evaluation - Project No. OCI-080001 - Google Chrome". The URL is ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uve/1003/183022?_uref=uuu813276850t1. The "Workflow Action Details" panel is open, showing "Request Evaluation" selected in the "Workflow Actions" dropdown. The "Send For Evaluation" button is visible. A red circle highlights the "To" button in the "To" field, and a red arrow points to the "Send" button in the top right corner. The "Due Date Details" panel shows "Task Due Date" is not available. A "User and Group Picker" dialog is open, showing a list of users and groups. The "Available Items" table lists users from "State of Ohio":

Name	Company
All Project Users	
Archana Atrey	State of Ohio
Matthew Weber	State of Ohio
Rita Nichols	State of Ohio
Shauna Hooks	State of Ohio
Steve Mayo	State of Ohio

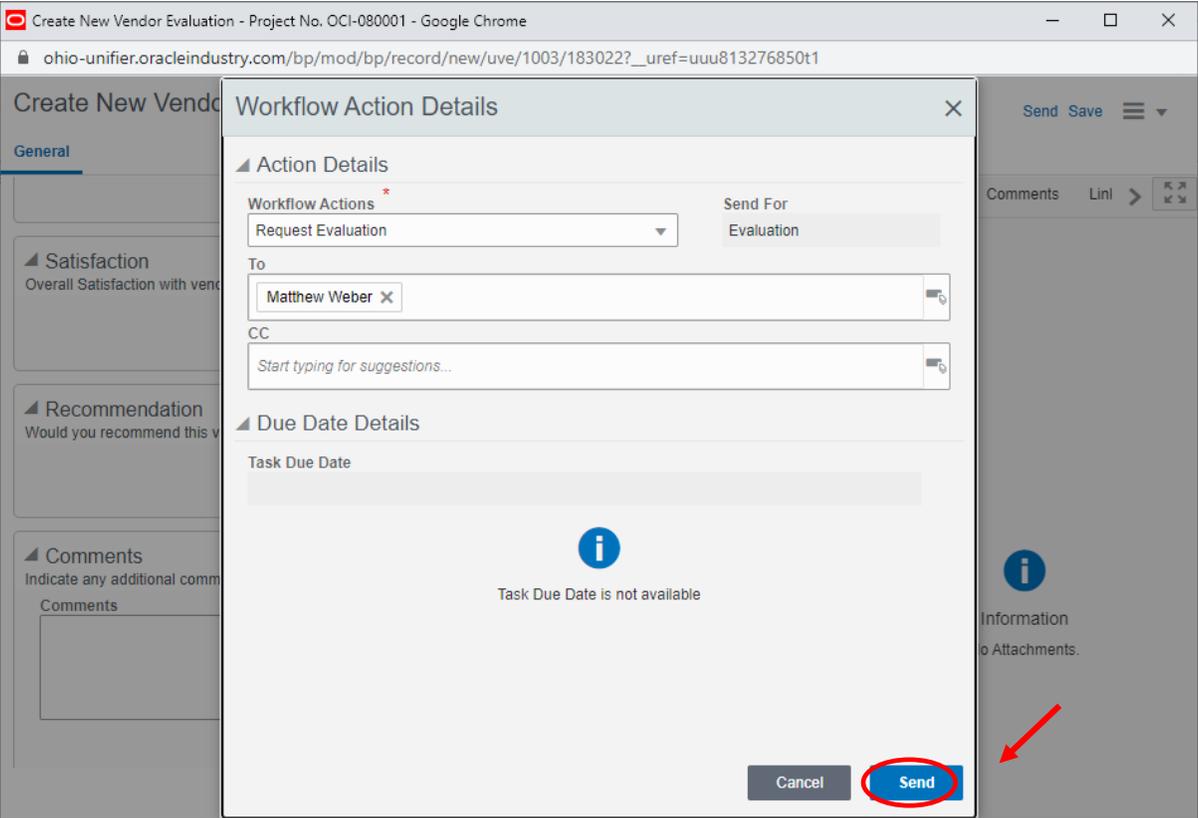
The "Selected Items" table shows "Users" and "Matthew Weber" selected:

Name	Company
Users	
Matthew Weber	State of Ohio

The dialog also shows "Total: 6" and "Cancel" and "Done" buttons.

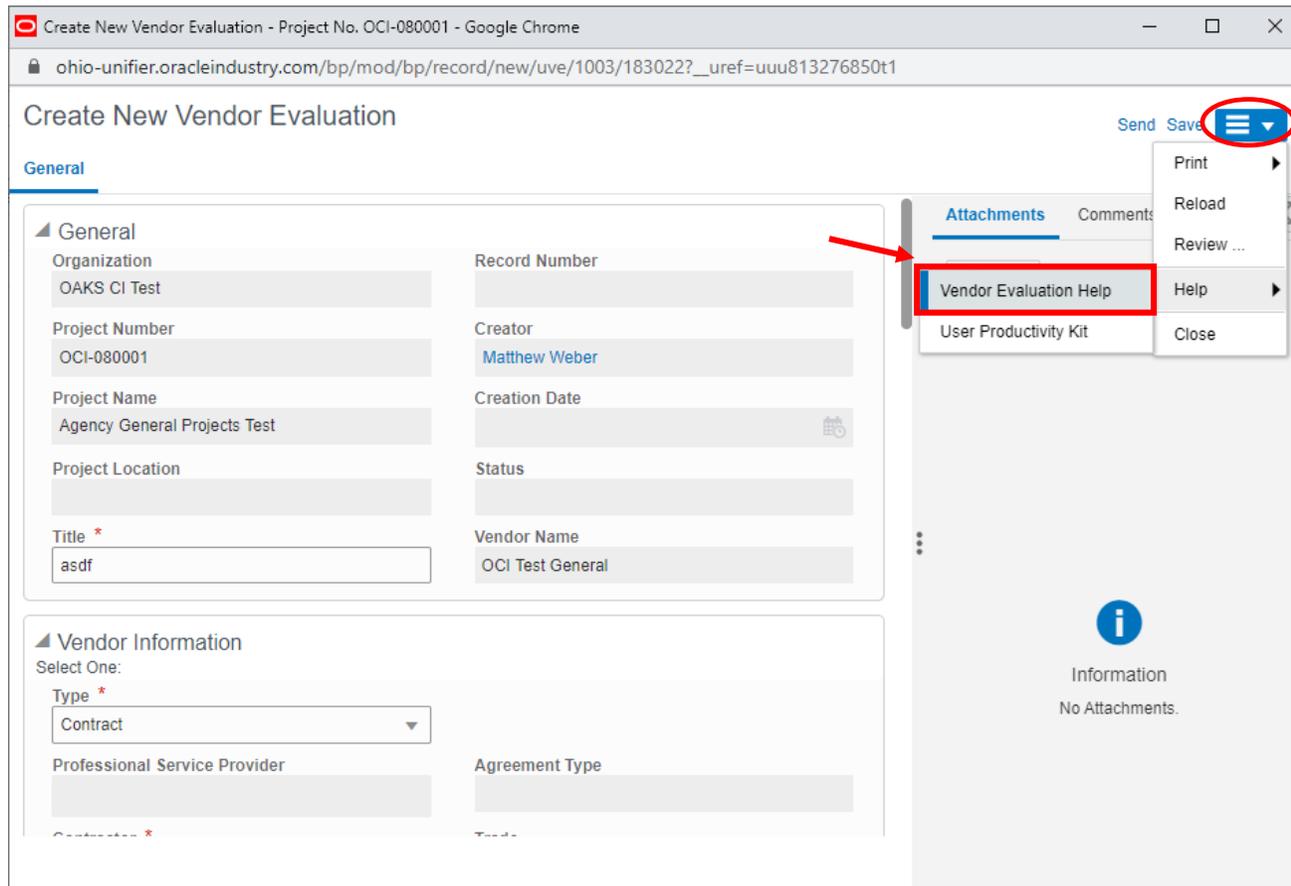
Send Record

▶ Click **Send**



Rating Rubric

- Rating Rubric can be found by clicking: **Menu -> Help -> Vendor Evaluation Help** and downloading the PDF



SCORE	RATING	DEFINITION
5	Outstanding	<ul style="list-style-type: none"> The Vendor frequently exceeded the requirements of the contract Non-conformance affected a negligible portion of the project No direction required; the contractor initiated preventative measures Inspection, support and/or review at minimal level
4	Commendable	<ul style="list-style-type: none"> The Vendor very frequently met and occasionally exceeded the requirements of the contract Non-conformance affected a small portion of the project No direction required; the contractor initiated identification, reporting and remedial action Inspection, support and/or review at reduced level
3	Satisfactory	<ul style="list-style-type: none"> The Vendor met the requirements of the contract Non-conformance affected an average portion of the project Required minimal direction; the contractor initiated remedial action Inspection, support and/or review at normal level
2	Needs Improvement	<ul style="list-style-type: none"> The Vendor occasionally did not meet requirements of the contract Non-conformance affected a large portion of the project and/or had a major impact on the project Required direction by owner's representative to rectify Required additional inspection, support and/or review effort
1	Not Satisfactory	<ul style="list-style-type: none"> Vendor did not meet requirements of the contract Non-conformance affected a large portion of the project and had a significant negative impact on the project Required frequent and strong direction to rectify Required high level of inspection and/or review Contractor in default and issue not rectified
0	Not Applicable N/A	<ul style="list-style-type: none"> No information or did not apply to the contract



Rating Rubric

- ▶ Complete the Key Performance Indicators Section

Create New Vendor Evaluation - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uve/1003/172747?__uref=uuu813276850t1

Create New Vendor Evaluation

Send Save

General

Key Performance Indicators
Select "HELP" for definitions of each performance level rating option.

Scope
Effectively performed the scope of services including changes to the work

Scope *
5 - Outstanding

Schedule
Contributed to an on-schedule project completion; completed deliverables on time

Schedule *
2 - Needs Improvement

Budget
Provided valuable assistance and accurate estimating, tracking and reporting to contribute to an on-budget project.

Budget *
4 - Commendable

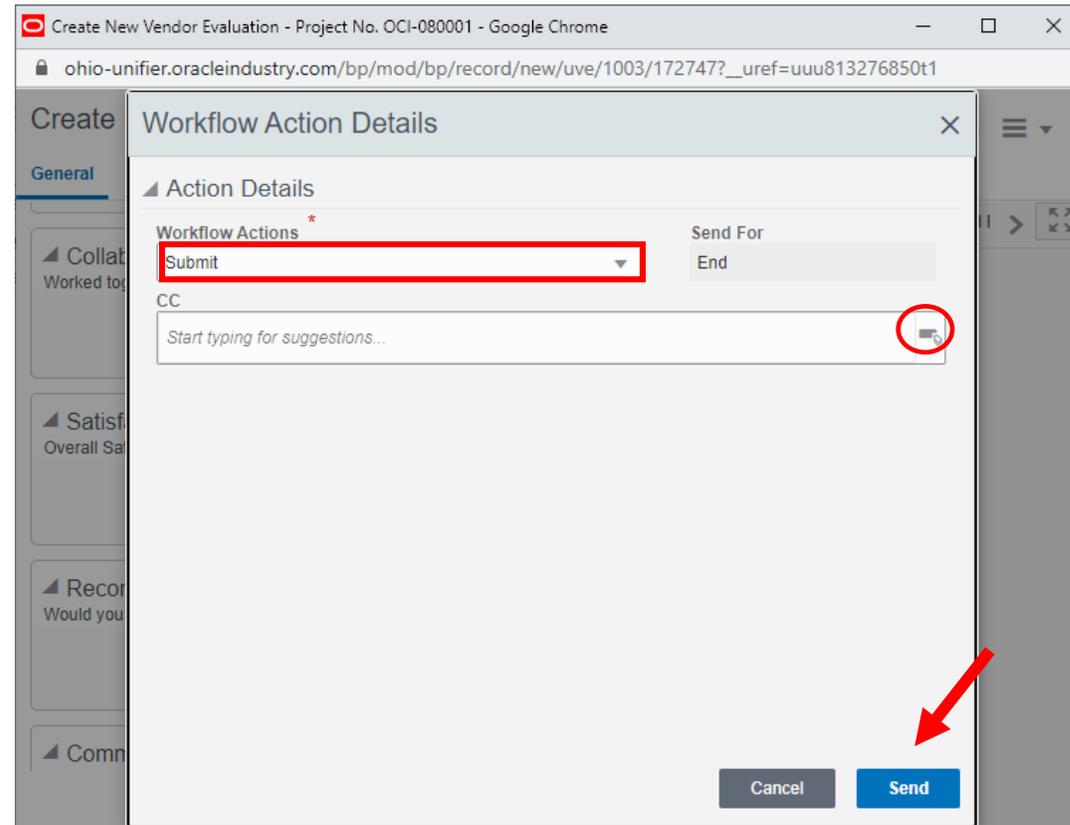
Attachments

Information
No Attachments.



Send Evaluation to End

- ▶ When submitting the evaluation will go to the “End” step.
- ▶ Verify Workflow Action
- ▶ User’s can be “CC’d” if necessary
- ▶ Click “Send”



Send the Record

- ▶ Once the review is complete click **Send** at the top of the record
- ▶ Choose Workflow Action:
 - ▶ **Accept:** send the record to the PM for review
 - ▶ **Return for Clarification:** return to the Contractor for changes if necessary
- ▶ Click **Send**

The image consists of three overlapping screenshots of a web application interface, illustrating the steps to send a record.

The top screenshot shows the main record page for "Contract Modification K12". At the top right, there are buttons for "Send" and "Save". A red circle highlights the "Send" button, with a red arrow pointing to it from the text "Send" in the instructions.

The middle screenshot shows a "Workflow Action Details" dialog box. The "Workflow Actions" dropdown menu is open, showing options: "Select", "Accept", and "Return for Clarification". A red box highlights the dropdown menu, and a red arrow points to the "Accept" option.

The bottom screenshot shows the "Workflow Action Details" dialog box with "Accept" selected. The "Send For" field is populated with "PM Review". The "To" field contains a list of email addresses. The "CC" field is empty. At the bottom right, there are "Cancel" and "Send" buttons. A red circle highlights the "Send" button, with a red arrow pointing to it from the text "Send" in the instructions.



Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211

