



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 'Agency' and 'OAKS CI Trainin...'. A left-hand menu is open, with 'Logs' highlighted by a red circle. Below 'Logs', the 'Vendor Evaluation' option is highlighted by a red bar, and a red arrow points to it from the text 'Choose appropriate Workflow'. The main content area shows the 'Vendor Evaluation' page with a 'Create' button and a 'Request Evaluation' dropdown menu, both highlighted by a red box. The bottom status bar indicates 'Total: 96'.

Complete General Information

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

Create New Vendor Evaluation - Project No. OCI-080001 - Mozilla Firefox

https://ohio-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=172747&module_name=uve&project_id=1003&_uref=uuu276:navigator

File Edit View Actions Help

Workflow Actions Submit Send Save Spelling.. Undo Accept Task Add Attachment Discussion Close Window

General Vendor Evaluation

General

Organization: OAKS CI Test Record Number:

Project Number: OCI-080001 Creator: Katie Tuttle

Project Name: Agency General Projects Test Creation Date:

Project Location: Status:

Title: Joe's Contractor Evaluation * Vendor Name: OCI Test General

Vendor Information

Select One:

Type: Contract

Professional Service Provider: Select...

Contractor: OCI Test General Select... *

Subcontractor/ Supplier Declaration: Select...

Agreement Type:

Trade: General Contractor

Services/Material Brands:

Evaluator: Tuttle Select...

Company: State of Ohio

Action Details

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

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 a web application 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 https://ohio-unifier.oracleindustry.com/bp/project/new?fromMasteredLog=18&template_id=183022&module_name=uve&project_id=1003&.... The interface includes a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar, there are buttons for "Workflow Actions", "Request Evaluatic", "Send", and "Save". The "Request Evaluatic" button is highlighted with a red box. The "Send" button is also highlighted with a red box. The "Request Evaluation" workflow action is selected, and the "To..." button is highlighted with a red circle. A red arrow points from the "Send" button to the "Request Evaluation" workflow action, and another red arrow points from the "To..." button to the "User/Group Picker" dialog box.

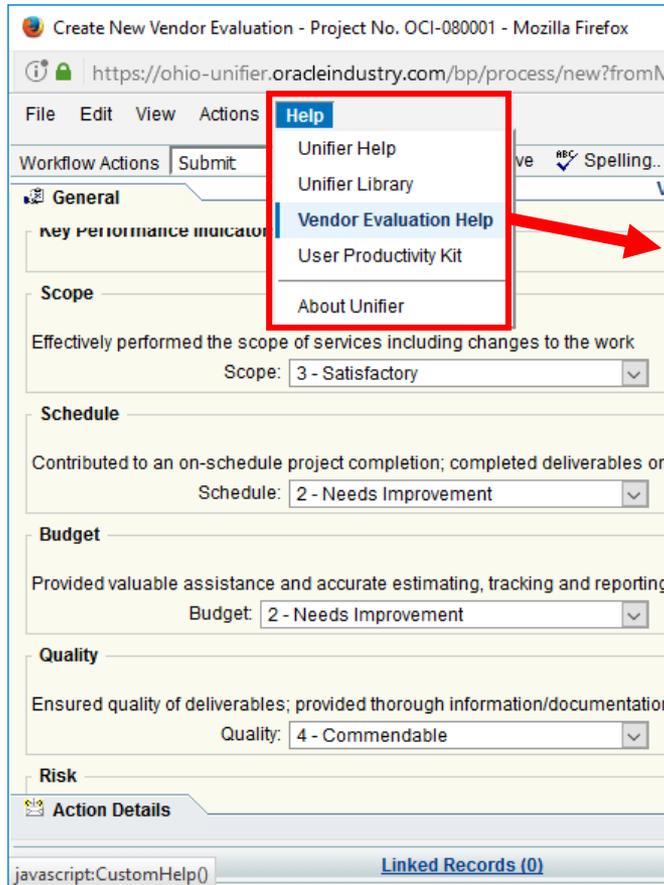
The "User/Group Picker" dialog box is titled "User/Group Picker - Google Chrome" and shows a list of users and groups. The list is titled "Users/Groups - Current View: All" and contains 8 items. The list is displayed in a table with columns for "Name" and "Company". The selected user is "Katie Tuttle" from "State of Ohio".

Name	Company
All Project Users	
Brett Gundlach	State of Ohio
Katie Tuttle	State of Ohio
Rita Nichols	State of Ohio
Sara Freetage	State of Ohio
Shauna Hooks	State of Ohio
Steve Mayo	State of Ohio
VAMSHIDHAR RACHAKONDA	State of Ohio

The dialog box also includes buttons for "Add", "View Profile", and "Members". Below the list, there is a section for "Selected Users/Groups" which shows "Katie Tuttle" selected.

Rating Rubric

- Rating Rubric can be found by clicking: **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

Complete Key Indicators

- ▶ Complete “Key Performance Indicators” section

The screenshot shows a web browser window titled "Create New Vendor Evaluation - Project No. OCI-080001 - Mozilla Firefox". The address bar contains the URL: https://ohio-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=172747&module_name=uve&project_id=1003&_uref=uuu276:na. The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". Below the menu bar is a toolbar with buttons for "Workflow Actions", "Submit", "Send", "Save", "Spelling..", "Undo Accept Task", "Add Attachment", "Discussion", and "Close Window".

The main content area is titled "Vendor Evaluation" and has a "General" tab selected. The "Key Performance Indicators" section is highlighted with a red border. It contains the following fields:

- Scope:** Effectively performed the scope of services including changes to the work. Scope: 3 - Satisfactory
- 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: 2 - Needs Improvement
- Quality:** Ensured quality of deliverables; provided thorough information/documentation throughout all phases of the project; effectively resolved errors/ omissions. Quality: 4 - Commendable
- Risk:** Proactively identified, assess and managed risks. Risk: 4 - Commendable

Below the "Key Performance Indicators" section are tabs for "Leadership" and "Action Details". At the bottom of the form, there are four links: "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

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”

Create New Vendor Evaluation - Project No. OCI-080001 - Mozilla Firefox

https://ohio-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=172747&module_name=uve&project_id=90%

File Edit View Actions Help

Workflow Actions Submit Send Save Spelling.. Undo Accept Task Add Attachment Discussion Close Window

Vendor Evaluation

General

Key Performance Indicators

Scope

Effectively performed the scope of services including changes to the work

Scope: 3 - Satisfactory

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.

Action Details

Submit

To...

Cc... Rita Nichols,Shauna Hooks

Send For: End

Task Notes:

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

Questions?

Please contact OAKS CI Support Desk:

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