

nVALUE

Administrators Guide

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SECTION A OVERVIEW

nVALUATE is a set of software tools available in the cloud to assist in procurements. The tool consists of several independent modules, each separately purchasable or in combinations.

Document Purpose

The purpose of this document the administrators guide for administrators of the nVALUATE suite of modules. The document includes detailed instructions on how to configure, setup and run all the nVALUATE modules.

Modules

nVALUATE is made up of several independent modules. Each module can be purchased separately or a combination of modules in a bundle. Following is a list and short description of each module.

Score

nVALUATE – Score is a web-based portal that allows evaluators and process personal to capture, analyse and report on scores and comments given by independent evaluators during the evaluation of a procurement response. The tool provides the capability for evaluators to enter their evaluation remotely and provide feedback through multiple evaluation phases. Procurement process specialists and probity auditors are able to view a complete audit of all scoring throughout the evaluation process.

Detailed analysis and comparisons are provided as part of the reporting suite including a final report with coloured charts of all the results at every stage.

SECTION B INSTALLATION

nVALUATE is deployed in two flavours:

1. **Cloud;** as a cloud-based Software as a Service, accessible over the internet.
2. **Appliance;** as a hardware appliance that you can install on your own premises.

Installing nVALUATE – Cloud

If you have already signed up to nValuate and purchased a cloud licence, then everything should be installed and ready to go. You will have been given:

1. A web address to go to
2. Your starter administration sign-in details

Installing nVALUATE – Appliance

SECTION C COMMON CONFIGURATION

This section covers configuration of the core nVALUATE system, which is common to all modules. From the main administration menu you will find a section called SYSTEM refer **Figure 1 – System Settings** . From here you can:

- Change System Settings
- Manage Users
- View and download audits
- Performa maintenance tasks such as backups

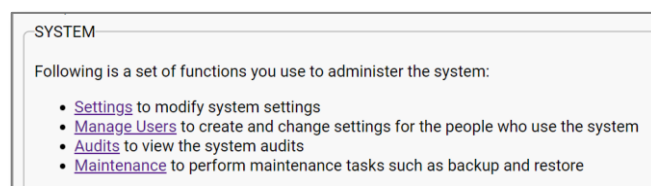


Figure 1 – System Settings

Global Settings

From the Admin Home screen select **Settings** in the System section. This will take you the Settings Configuration screen – refer **Figure 2 Settings**. From here you set site settings:

The screenshot shows the 'SETTINGS' configuration screen. It has several sections:

- SITE TITLE**: A text field containing 'nVALUATE Test'.
- SECURITY SETTINGS**:
 - ☐ USE TWO FACTOR AUTHENTICATION VIA TEXT MESSAGE
 - MAX SIGN-IN ATTEMPTS**: A text field containing '3'.
 - NO ACTIVITY MINUTES BEFORE FORCE SIGN-IN**: A text field containing '30'.
- PASSWORD POLICY**:
 - MINIMUM LENGTH**: A text field containing '8'.
 - MINIMUM NUMBER OF UPPER CASE CHARACTERS**: A text field containing '1'.
 - MINIMUM NUMBER OF LOWER CASE CHARACTERS**: A text field containing '1'.
 - MINIMUM NUMBER OF NUMERIC CHARACTERS**: A text field containing '1'.
 - MINIMUM NUMBER OF NON ALPHANUMERIC CHARACTERS**: A text field containing '0'.
 - FORCE RENEW PASSWORD EVERY n DAYS**: A text field containing '0'.
 - MINIMUM NUMBER OF HOURS SINCE LAST CHANGE**: A text field containing '24'.
 - CANNOT REPEAT LAST n PASSWORDS (MAX 25)**: A text field containing '10'.

At the bottom of the form is a 'CHANGE' button.

Figure 2 Settings

Site Title

Enter your site title in the SITE TITLE field. This title is displayed on screens and reports so you can identify what system they originated.

Security Settings

USE TWO FACTOR AUTHENTICATION VIA TEXT MESSAGE

Selecting this option forces a text message to be sent with a unique code to anyone who signs in. The user is then required to enter this code at a second stage of the sign-in process.

MAX SIGN-IN ATTEMPTS

This setting sets the maximum number of times a user can sign in before their account is locked.

Password Policy

The system wide password policy is set here with the following settings:

MINIMUM LENGTH

This is the minimum number of characters that must be entered as a password.

MINIMUM NUMBER OF UPPER-CASE CHARACTERS

This is the minimum number of uppercase characters that must be present in any new password. A value of 0 means it is not checked.

MINIMUM NUMBER OF LOWER-CASE CHARACTERS

This is the minimum number of lowercase characters that must be present in any new password. A value of 0 means it is not checked.

MINIMUM NUMBER OF NUMERIC CHARACTERS

This is the minimum number of numeric characters (0-9) that must be present in any new password. A value of 0 means it is not checked.

MINIMUM NUMBER OF NON-ALPHANUMERIC CHARACTERS

This is the minimum number of non-alphanumeric characters (0-9) that must be present in any new password. A value of 0 means it is not checked.

FORCE RENEW PASSWORD EVERY n DAYS

The number of days a password is valid before the user is forced to change it.

MINIMUM NUMBER OF HOURS SINCE LAST CHANGE

The number hours after a password change before it can be changed again. A value of 0 means there is no check and a password can be changed at any time.

CANNOT REPEAT LAST n PASSWORDS (MAX 25)

The number of previous passwords to check to ensure none of these are reused. A value of 0 means no checking.

Manage Users

This is where you can manage users of the system. By default, a single user called Administrator is initially configured.

The system requires that anybody that uses the system MUST be a valid and approved user. The Manage Users functions are where you can create, delete and modify system users.

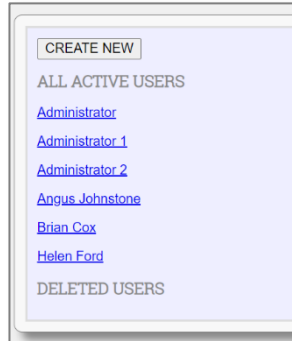


Figure 3 Create and Manage Users

Create new user

The following describes how to set up a new user.

1. Select the CREATE NEW button top left of the screen. Refer **Figure 3 Create and Manage Users**.

A screenshot of a web application form titled 'NEW USER'. The form has a light yellow background and a grey header. It contains several input fields: 'NAME', 'USERNAME' (with a placeholder 'Username or leave blank to use email'), 'MOBILE PHONE', and 'EMAIL'. Below these fields are two sections of checkboxes. The first section is 'USER NOTIFICATION OPTIONS' with 'EMAIL NOTIFICATIONS' and 'TEXT NOTIFICATIONS' both checked. The second section is 'USER CAPABILITIES' with 'CAN RUN AND REPORT' and 'CAN CONFIGURE AND CREATE' unchecked. Below this is 'SCORE USER PROPERTIES' with 'IS EVALUATOR' unchecked. At the bottom left of the form is a 'CREATE' button.

Figure 4 New User

2. Enter the following generic details:

NAME - The User's name

USERNAME - A user name or leave blank if the user name is their email address.

MOBILE PHONE – The mobile phone number of the user. You should always prefix with the GSM MSISDN international dialling code. E.g. +6421555555

USER NOTIFICATION OPTION – Tick if the user would like notifications via EMAIL or TEXT

3. Module dependant details:

The following details are module dependant.

SCORE

SCORE USER PROPERTIES – Tick IS EVALUATOR if the user is an evaluator in the SCORE module.

ROOM

DATA ROOM ACCESS – Allow access for this user to the Data room.

CAN UPLOAD CONTENT – Allow the user to upload content to the Data room

CAN DELETE CONTENT – Allow the use to be able to delete content from the Data room.

Change and existing user

To edit a user, select their name in the left panel under either ALL ACTIVE USERS or DELETED USER. This will bring up a screen with the user details. Refer **Figure 3 Create and Manage Users**.

The screenshot shows a web interface for managing users. The title is 'Administrator'. The form contains the following fields and options:

- NAME:** Administrator
- USERNAME:** admin
- MOBILE PHONE:** +64215555555
- EMAIL:** someone@myhost.com
- FORCE PASSWORD RESET:** ☐
- LAST SIGN-IN:** Tue 1st September 2020 07:49
- LAST SCORE HEARTBEAT:** User never entered scoring module
- USER NOTIFICATION OPTIONS:**
 - EMAIL NOTIFICATIONS:** ☐
 - TEXT NOTIFICATIONS:** ☒
- USER CAPABILITIES:**
 - CAN RUN AND REPORT:** ☒
 - CAN CONFIGURE AND CREATE:** ☒
- SCORE USER PROPERTIES:**
 - IS EVALUATOR:** ☐

At the bottom, there is an **UPDATE** button and a box labeled **OTHER ACTIONS** containing **DELETE USER** and **RESET PASSWORD** buttons.

Figure 5 Change User Details

Delete User

To delete a user, select their name in the left panel under either ALL ACTIVE USERS or DELETED USER. In the OTHER ACTIONS box, select the **DELETE USER** button.

Reset User Password

To reset a user's password, select their name in the left panel under either ALL ACTIVE USERS or DELETED USER. In the OTHER ACTIONS box, select the **RESET PASSWORD** button.

Unlock User Account

If a user account has become locked due to too many invalid passwords being entered, select their name in the left panel under either ALL ACTIVE USERS or DELETED USER. In the OTHER ACTIONS box, select the **UNLOCK ACCOUNT** button.

Audits

nVALUATE keeps an audit trail of almost everything that occurs in the system. You can download or choose selected audit information by selecting the choices listed in the audit menu.

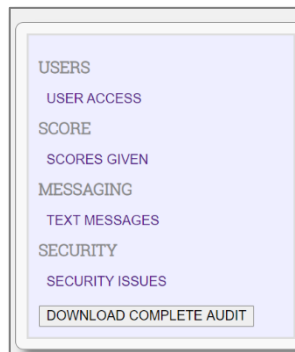


Figure 6 – Audit

User Access

To view all audit information for user access, select **USER ACCESS** from the Audit menu. This will display every sign-in, failed sign-in and forced password resets for each user. The list is order by user's name.

Messaging

To view the audit for all text messaging, select **TEXT MESSAGES** from the Audit menu.

Security

Any detected security error is audited, these could include detected attacks on the system, multiple attempts to sign-in with brute force password attacks etc.

To view the security audit, select **SECURITY ISSUES** from the Audit menu.

When someone signs into the system, the system creates a new session. This session is valid for approximately 30 minutes, after which it times out. If no activity has been received by the user within this time, the user may experience a security error due to the expiration of the session. These entries are often found in the audit as either CSRF or Session Timeout, they are quite normal.

Download the Audit

To download the full audit trail, select the **DOWNLOAD COMPLETE AUDIT** button from the audit menu. This will download the full audit in csv format that can be viewed in a spreadsheet.

Maintenance

From the main administration menu under SYSTEM select the Maintenance Option. From here you will be given options to Backup and Restore, View and download all available backups, and dump the complete Score module to Excel.

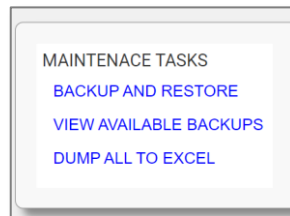


Figure 7 – Maintenance Tasks

Backup and Restore

The backup and restore function allow you to create a snapshot of the complete system. This will create a single encrypted file that can be used to roll back the system to the time when the snapshot was created.

Note this file is different from the files available under **VIEW AVAILABLE BACKUPS**.

 A screenshot of the "BACKUP AND RESTORE" screen. It is divided into two main sections: "BACKUPS" and "RESTORE".
 The "BACKUPS" section contains the text: "Create a secure backup of the data in the system. This will download a file to your PC, you will need to copy the file and save it somewhere safe in case you need it to restore at a later time." Below this is a "BACKUP OPTIONS" section with a checked checkbox for "DATABASE" and a "BACKUP" button.
 The "RESTORE" section contains the text: "To securely restore from a backup, select the 'Choose File' button and open the file. Once selected select the 'RESTORE' button to restore from backup." Below this is a "WARNING" message in red: "WARNING: Doing this will erase any changes made to the system between when the backup was taken and now." At the bottom of the "RESTORE" section are a "Choose File" button (which shows "No file chosen") and a "RESTORE" button.

Figure 8 – Backup and Restore

Backup

To create a secure backup of all data in the system, select the **BACKUP** button from the BACKUP AND RESTORE screen. To include all the databases, ensure you have checked the **DATABASE** checkbox.

Restore

To restore from a previous backup or snapshot, select the **Choose File** button in the **RESTORE** section. From your web browser's file selection screen, navigate and

select a previous backup. You can then choose RESTORE and the system will be restored back to the point in which the backup was taken.

WARNING: Doing this will overnight any changes that have occurred between the time of the backup and the current time.

View Available Backups

Select this option to view the system backups that occur every hour. You can select any one of these, and download them, but they cannot be used to restore the system as described in **Restore** above.

To restore from one of these backups you will need to contact nVALUATE who can recover the system for you.

Dump all to Excel

This is feature allows you to dump the complete set of scores in the score module to one single spreadsheet. By selecting this a csv file is downloaded.

SECTION D SCORE

The score module is used for evaluators of procurements where a respondent has returned a submission, quote, tender or proposal and this response is required to be analysed and scored.

CONCEPTS

The section introduces you to the structure and concepts behind the nVALUATE system.

Terms used by nVALUATE

Following are some common terms used with nValuate.

Evaluator	an individual who reviews the answers provided and creates and individual score.
Phase	An iteration of an evaluation. An evaluation may go through several phases scoring the same Questions through multiple processes and guidelines.
Question	A question that has given to a proposal respondent to answer and will be scored by an Evaluator .
Rule	A formula applied as validation against an entered score. The result of the formula against a Score is either is either valid or invalid.
Score	A numeric value given by an Evaluator as a subjective rating to a Question or Sub-attribute .
Section	A group of Questions
Sub-attribute	A sub-attribute of a Question . Used to break up the scoring of a Question and is scored separately.
Weighting	A mathematical value applied to a score or group of scores to change the Score giving it more or less importance in terms of the final result.

Definition of an evaluation

Sections and Questions

A normal proposal will have a series of questions that require answering. It is these questions that either a single individual or a team will evaluate and score accordingly. nVALUATE stores these questions along with the original question text.

Question Attributes

- **Question Identifier** – an entity that represents the question, this normally includes a numeric reference to the question.
- **Question Section** – The section that this question belongs to.
- **Question Text** – The question text as described in your proposal.
- **Question Weighting** – This is a weighting assigned to the question and allows for some questions to have a higher influence on the outcome than others. The sum of all weightings for all questions MUST equal the

weighting assigned to the evaluation. Refer **Create Evaluation** on page 16

- **Question Guide** – Optional guiding instructions to an evaluator on how to score this question.

Questions are often grouped into sections within a proposal.

Section Attributes

- **Section Name** – a simple name for the section.

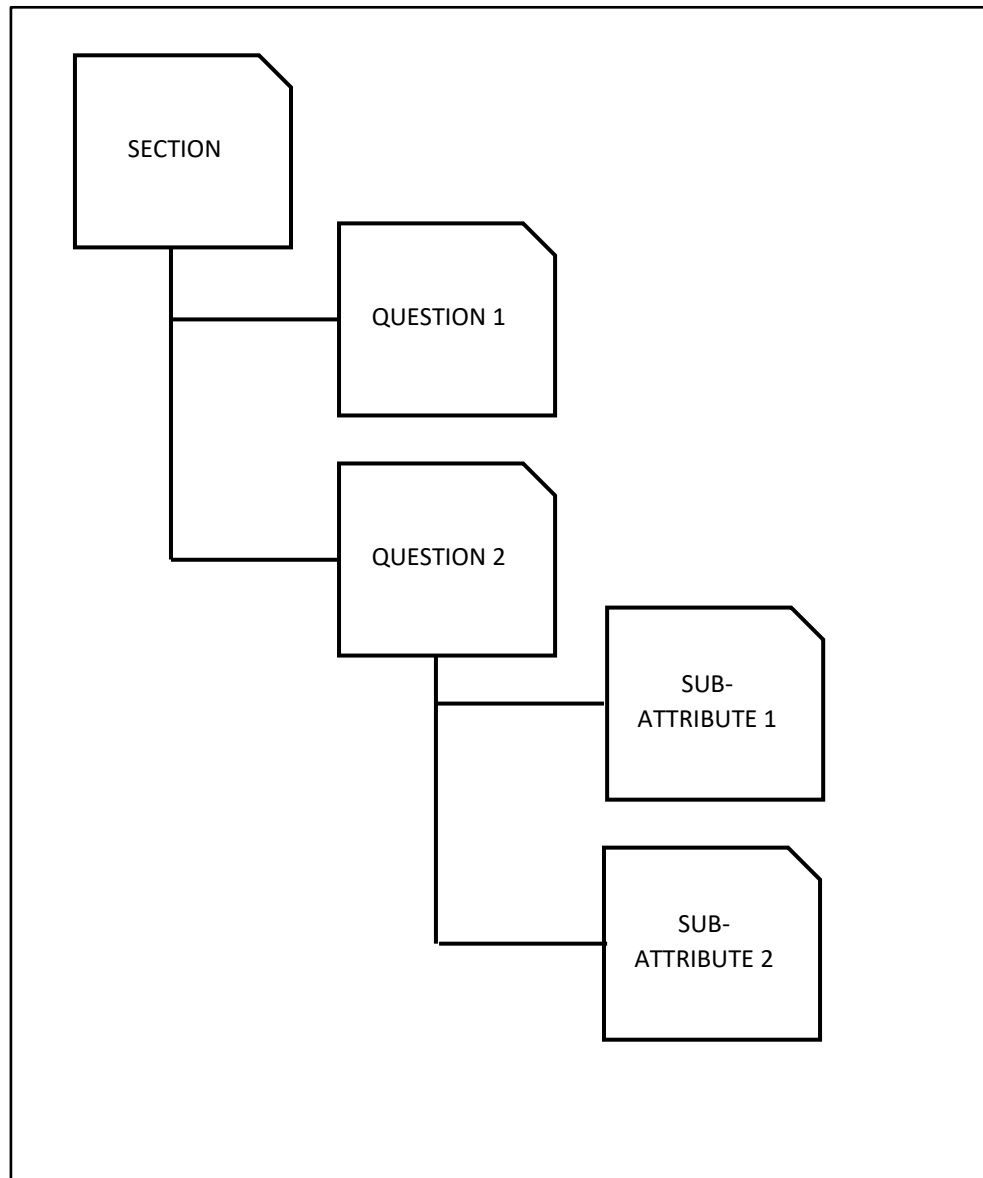


Figure 9 Section, Question Sub-Attribute Hierarchy

Section Rules

There must be a minimum of one section. Even if your proposal does not have sections, nVALUATE requires that questions should be grouped into a minimum of one section.

Sub-attributes

As an option questions may have evaluation sub-attributes which are only required for the evaluation. These sub-attributes allow a question to be broken down into parts and evaluated separately.

Sub-attributes Attributes

- **Sub-attribute number;** The number of the sub-attribute. This is a numeric only attribute.
- **Sub-attribute question;** The question that the sub-attribute belongs.
- **Sub-attribute text;** Descriptive text about the specific sub-attribute. This normally describes what part of the question or what area of the question these references.
- **Sub-attribute guide;** Addition guide text for an evaluator on how to score the sub-attribute.
- **Sub-attribute weighting;** The weighting of the sub-attribute. This is a number that is greater than 0 and less than or equal to 1 (0 – 100%).

Sub-attributes Rules

Sub attributes are optional, and an evaluation can be scored without having any question sub-attributes. The sum of the weightings of the sub-attributes relating to a single question MUST equal 1 or 100%.

Rules

A rule is a scoring rule that is used to limit the numeric range that an evaluator can enter as part of the scoring.

A rule is made up of three components:

- The **minimum** value that can be entered as a score against in question and or sub-attribute.
- The **maximum** value that can be entered as a score against any question or sub-attribute
- The **increment** or modulus permitted. For example, a rule can be set up for scores that have a minimum and maximum values of 0 – 100 but must be in increments of 5. Therefore the following values are valid; 0, 25 , 35 or 60. But values of 21 77 and 56 are invalid.

Rules attributes

- **Rule Name;** A name you give to a rule. This is used to identify the rule when defining a phase. Refer ***Phases*** on page **18**
- **Minimum Value;** The minimum permitted value an evaluator can enter.
- **Maximum Value;** The maximum value an evaluator can enter.
- **Increment;** The permitted increment that is applied of entered scores between the defined minimum and maximum inclusive.

Note: The increment value must also be valid for the whole number of both the minimum and maximum.

Rules rules

Minimum, maximum and increment values must be whole numbers.

Phases

The scoring of responses can occur in multiple phases as the scoring process is refined and cross checked. Evaluators are assigned to a phase, and not all evaluators need be in all phases.

An example may be an Initial phase is defined and multiple evaluators each determine the score for all or a subset of questions for all respondents. After this phase has been complete, a review is done on individual evaluators scores and process is gone through to determine what an agreed score should be. The next phase is then started and the agreed score entered into this phase.

Phase Attributes

- **Phase Name;** The name of the phase.
- **Phase single evaluator;** Set if this phase is only allowed a single evaluator for each question. You can have multiple evaluators for the phase, its just that each question can only have one.
- **Phase Rule;** The Rule that applies to this phase. Refer to **Error! Reference source not found.** on page **Error! Bookmark not defined.**
- **Phase Enabled;** A phase cannot start, and Evaluators cannot score until such time as the phase is enabled. Refer to **Enable Phase or Change Status** on page **26**

Evolution of an evaluation

nVALUATE has been designed to allow the scoring to progress through multiple phases. With each phase the scores are refined as more and more inputs to the evaluation are received and agreed.

You can specify as many phases as required, and each phase keeps an independent account for scores and comments for each question. All audits of scores and comments are logged against a specific phase.

An example of how an evaluation may progress follows:

1. Three phases are defined:
 - a. An initial phase set to allow multiple evaluators per question
 - b. A moderation phase set for single score per question
 - c. A final phase set with a single score per question.
2. The initial phase is configured with multiple evaluators assigned to a team or teams. Questions and evaluators are assigned to teams. During this phase, each evaluator evaluates their respective questions resulting in multiple scores and comments being recorded for each question.
3. Once the initial phase is completed, the next phase is enabled with a single evaluator or chairperson allocated to be the scorer. A moderation session commences where all the initial evaluators meet and discuss each of their respective scores. The evaluator assigned as chair will get a different view on the score page, allowing them to view and copy scores and comments from all

evaluators. A consensus is reached and the score entered for this phase with any comments.

4. Often, further information such as due diligence is now performed and as a result scores can be again modified in the final phase.

Phases have three defined states:

1. **Defined (Not started)**; This is the default starting point of a phase. It is effectively defined but not yet enable to allow scores and comments to be attributed to the questions for the phase.
2. **Enabled**; This is the normal state of a phase, scores and comments can be entered and changed by evaluators in this phase.
3. **Complete**; This phase state is set by the administrator when all scores have been by all evaluators for the phase. Once in this state, scores and comments cannot be changed, the phase assumes a locked state.

Note: Certain reports and functions will only work or be available if phases are in set states.

Moderations

The term moderation is used where evaluators' individual scores are discussed, and a single score is reached as a consensus. This is achieved by defining phases, with the first phase being set for multiple evaluators on each question and the next phase being set as a single score per question assigned to a single evaluator.

nVALUATE has the ability to provide a chair person or lead evaluator with a view of all prior individual scores and comments given by any individual evaluator. The evaluator score page will automatically provide a view of all scores and comments from the immediate prior phase, if that phase was a multi-evaluator phase.

CONFIGURATION

This section covers the configuration of the Score module of the nVALUATE system. From the main administration menu you will find a section called SCORE refer **Figure 10 Score Menu**.

From here you can:

- Create a new evaluation
- Setup and change the configuration of an evaluation
- Run the evaluation
- Monitor progress
- Perform functions using utilities
- Run reports
- Perform maintenance of the system

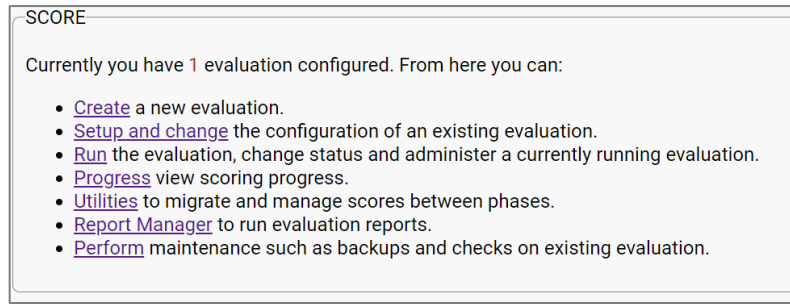


Figure 10 Score Menu

Introduction to configuration

You must have been set up as an Administrator to be able to configure the system.

You will need to know the host name that has been allocated to you for your instance of nValuate. Replace the <name> in the following commands with the correct name of your instance.

Signing In

Follow these steps to sign in:

1. Go to <https://<name>.nvaluate.com/>
2. Enter your username and password. You can have either an email address or a specific name for your username.
3. Select Sign In

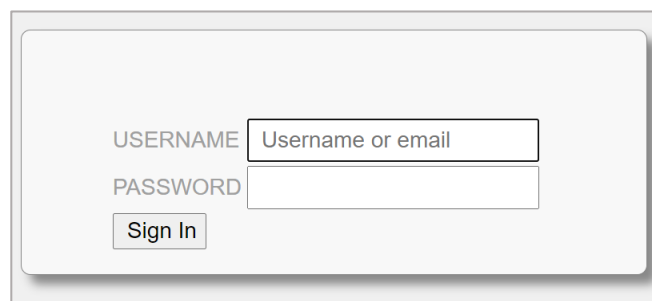


Figure 11 Sign-in

NOTE: Passwords are case sensitive.

Signing In for the first time

If this is the first time you are signing in, you will be required to select your own password. It is here that the Password Policy set up for your organisation is applied.

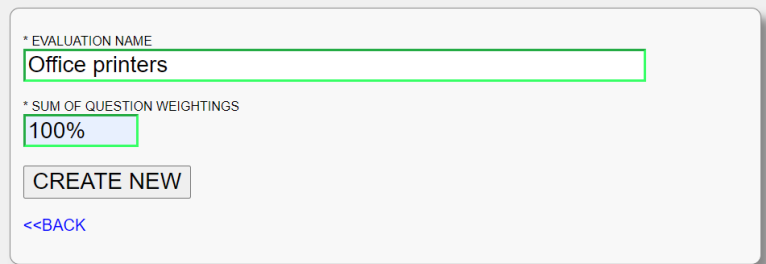
1. Sign In with the starter password you have been assigned. Refer **Signing In** above
2. You will now be presented with another screen, where you asked to enter you OLD PASSWORD, in this case your starter password, and a new password twice.

3. If the new password does not meet the Password Policy requirements, then an error message will be displayed.

Create Evaluation

When you click on “Create” in the ADMIN screen, you will be taken to a screen to create your evaluation where you enter:

- **EVALUATION NAME** – this is the name of the evaluation you want to manage in nValuate. This is a text field where you can enter up to 100 characters.
- **SUM OF QUESTION WEIGHTINGS** – this is what you want the weightings of your questions to add up to (e.g. 100%).



* EVALUATION NAME
Office printers

* SUM OF QUESTION WEIGHTINGS
100%

CREATE NEW

<<BACK

Figure 12 Create new Evaluation

Configuring an evaluation

To start to setup the evaluation, select **Setup and Change** from the Admin screen. This will take to the primary interface for the setup tasks where you should see the name of the evaluation you have just entered and list of tasks that need to be performed to complete the setup.

You can go back and edit the name and sum of weightings of the evaluation by selecting **EDIT EVALUATION**.

When you first arrive and the SETUP TASKS menu the first task RULES should be pre-selected:

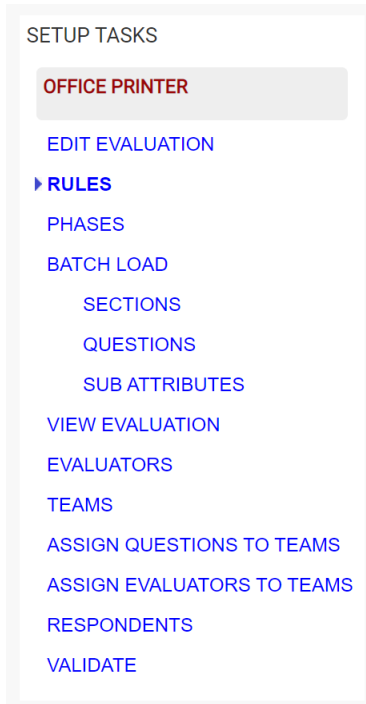


Figure 13 Setup tasks

Rules

A rule set states Min/Max and Modulus of scores. Example a rule set may be 0/100/5 which means lowest you can score is 0, maximum is 100 and must be in multiples of 5. A rule set is set against a phase.



Figure 14 Rules

Create new rule

For the left Setup Tasks panel select **RULES**. In the right-hand panel select the **CREATE NEW RULE** button.

Enter a unique rule name, which describes the rule you are creating, the minimum score value, the maximum score value and the increment value (modulus) and press **CREATE NEW RULE**

Rules

* RULE NAME

* MINIMUM VALUE

* MAXIMUM VALUE

* INCREMENT VALUE

CREATE NEW RULE

<<BACK

Figure 15 Create new Rule

After you have created a rule, you can click on that RULE NAME to edit the rule. Just edit any of the 4 fields, and then click on CONFIRM RULE CHANGE.

Once you have created as many rules as you want, the next step is to click on PHASES. Note that you can always go back and add, remove or edit rules at any time.

Phases

Phases relates to each phase of your procurement. For example, you may have an individual scoring stage, moderation stage and final scoring stage.

You can have as many phases as you require, but not some reports will only be available if all phases have been completed. A typical evaluation may have as an example three phases:

- An initial phase with multiple evaluators all scoring a set of questions
- A moderation phase with a single score for each question
- A final phase where all scores are finalised with a single outcome.

When you select PHASES the Phases screen will appear. Click on **CREATE NEW PHASE** to create a phase.

Phases

* PHASE NAME

* ORDER

SINGLE SCORE
☐

RULE

PARTIAL PHASE, NOT ALL QUESTIONS ARE SCORED
☐

CREATE NEW PHASE

<<BACK

Figure 16 - Create Phase

Enter the **PHASE NAME** to describe the name of the phase.

Enter a number for order, if the number is less than a previous number then the phase will appear before in lists. If the number entered is larger than any previous phase, then this phase will appear after that phase.

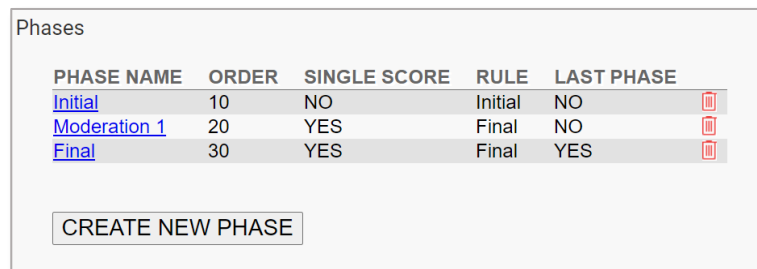
Tip: Start with 10 and use increments of 10, so the next one would be 20 followed by 30 etc. This way a change in order can easily be accomplished by entering a number between any of those already allocated, e.g. 25 for a phase between order 20 and Order 30.

The **SINGLE SCORE** tick-box relates to whether there is a single score for each question in this phase or multiple evaluators are scoring the same questions. For example, you may have a single score at a moderation phase.

You select the appropriate **RULE** for that Phase as defined previously. Refer to **Rules** on page 12

Finally, click on **CREATE NEW PHASE** to create the phase.

An example of three phases in evaluation and the list is depicted in Figure 17. To edit any phase select the blue highlighted phase name.



PHASE NAME	ORDER	SINGLE SCORE	RULE	LAST PHASE
Initial	10	NO	Initial	NO
Moderation 1	20	YES	Final	NO
Final	30	YES	Final	YES

CREATE NEW PHASE

Figure 17 List of phases

Once you have created all the required phases, you are ready to go to the next stage – where you can either BATCH LOAD in all your evaluation information, or manually enter in SECTIONS, QUESTIONS and SUB-ATTRIBUTES.

Batch Load

BATCH LOAD enables you to import a spreadsheet with all your procurement questions, weightings, sub-attributes and tags. The csv spreadsheet must have columns with the following headings:

COLUMN NAME	DISPOSITION	CONTENTS
SECTION	Mandatory	The section name of any procurement section or group of questions. There must be a minimum of one name.
QUESTION	Mandatory	The question identifier. This is an alpha numeric field but typically would be a number. You can use Q23 for example to

WEIGHTING	Mandatory	<p>represent question 23, or Question 23. A simple number in ascending order (rows in the spreadsheet) is recommended.</p> <p>The weighting applied to the question. The total weightings summed up must equal the “SUM OF QUESTION WEIGHTINGS” you entered when creating the evaluation. This number can be expressed as a decimal or a percentage using the “%” sign.</p>
TYPE	Optional	<p>range (default if blank)</p> <p>The score is entered as an integer between the rule set of minimum and maximum.</p> <p>YESNO</p> <p>The score for the question or sub-attribute must be either a YES or a NO. These will be ytranslated to integers of 0 and the maximum set in the rule.</p>
TAG	Optional	<p>A name you can tag the question with. Tagged questions are grouped together and reported differently for each tag value.</p>
TEXT	Optional	<p>This is the actual question text. You can use HTML syntax, but only the following HTML tags are permitted:</p> <ul style="list-style-type: none"> • p • h1 • ul • li
SUBATTRIBUTE	Optional	<p>If you want the evaluators to evaluate this question with sub-attributes, then add a sub-attribute number in this column.</p>
SUB_WEIGHTING	Optional	<p>Required if a SUBATTRIBUTE is used. Is a decimal or percentage number representing the weighting for this sub-attribute. All sub-attributes for the same question must add up to 1 or 100%.</p>
SUB_TEXT	Optional	<p>Any text you need displayed with the sub-attribute.</p>
GUIDE	Optional	<p>This is evaluator guidance that can be displayed to evaluators</p>

Table 1

See below an example spreadsheet for an evaluation:

SECTION	QUESTION	WEIGHTING	TEXT	SUBATTRIBUTE	GUIDE	SUB_WEIGHTING	SUB_TEXT
Function	1	20%	Printer speed		Score faster speeds higher and slower speeds lower.		
	2	30%	Paper capacity		Score greater capacity higher and smaller capacity lower.		
Operations	3	50%	Maintenance capability	1	Score experience in remoate maintenance	50%	Ability to access remotely to fix maintenance issues
				2	Score more regular updates higher	50%	Ability to remotely do firmware upgrades

Once you've created the spreadsheet, save it as a CSV (Comma Separated-Value) format.

View Evaluation

Once you've successfully uploaded the file, you will be taken to the VIEW EVALUATION screen where you will see the structure of your evaluation:

FUNCTION		
QUESTIONS		
1	20.00%	Printer speed
2	30.00%	Paper capacity
OPERATIONS		
QUESTIONS		
3	50.00%	Maintenance capability
		1 Ability to access remotely to fix maintenance issues
		2 Ability to remotely do firmware upgrades

Figure 18

A few things to note about setting up your file up upload successfully:

Question numbering is sequential and does not re-start for each new section.
Weightings must add up to the SUM OF QUESTION WEIGHTINGS you setup when you created the evaluation.

If you create sub-attributes, the combined weighting in SUB_WEIGHTING must add up 100% for that question.

The next step is to setup your Evaluators.

EVALUATORS

In the EVALUATORS screen you can CREATE or DELETE evaluators.

When you create an evaluator, you will be asked to enter:

- Their full name
- Their username which they will use for login
- Whether you want to force a password reset before they commence evaluation
- Which PHASES you want to assign them to.

Note – If a PHASE has been setup for SINGLE SCORE, then you can only assign 1 evaluator to that phase.

To create an evaluator, click on **CREATE**– enter their Name, Username, and what phase (or phases) they will be scoring. Then click on **CREATE EVALUATORS**

Once you have created all your evaluators, the initial passwords for each user will be displayed and an option to print / and or copy these.

EVALUATORS			
STATUS	NAME	USERNAME	PASSWORD
OK	John Smith	jsmith	yHTHcu
OK	Sample Person	psnmaple	Ep2kxL
<div> <div>PRINT</div> <div>COPY</div> </div>			

Figure 19 New evaluators

By selecting **EVALUATORS** again on the left panel will display the list of evaluators:



EVALUATORS					
NAME	USERNAME	Initial	Moderation 1	Final	
John Smith	jsmith	YES			
Sample Person	psnmaple	YES	YES	YES	
<div>CREATE</div>					

Figure 20 – List of evaluators

After the evaluators have been created, you can always go back and edit any details from this screen by selecting on their name. To create additional evaluators press the CREATE button.

If you need to delete an evaluator, you can press the red bin icon to the right of the evaluators name.

The next step is to create Teams for your evaluation.

Teams

The Teams part of nVALUATE enables you to create specialist teams that will be evaluating specific parts of your evaluation (for example Technical Team, or Operations Team, etc).

In the TEAMS screen click on CREATE NEW TEAM. You will then be asked to enter the name of the team, and then click on CREATE NEW TEAM.



Teams	
TEAM NAME	
Team A	
Team B	
<div>CREATE NEW TEAM</div>	

Figure 21 - Teams

ASSIGN QUESTIONS TO TEAMS

When you click on ASSIGN QUESTIONS TO TEAMS you will displayed a list of Teams with questions grouped into sections. The individual questions are hidden at this stage.

Typically teams will be assigned a complete section, so to simply the assignment of question to a team, the default screen allow a complete section of questions to be assigned with a single tick against the section.

Assigning all section questions to a team

To assign all the questions in a section to a team, select the tick box along isde the section name.

Once complete select the ASSIGN button.

ASSIGN QUESTIONS TO TEAMS

TEAM A

- > ☒ SECTION A
- > ☒ SECTION B
- > ☐ SECTION C
- > ☐ SECTION D
- > ☐ SECTION E

TEAM B

- > ☐ SECTION A
- > ☐ SECTION B
- > ☒ SECTION C
- > ☒ SECTION D
- > ☒ SECTION E

ASSIGN

Figure 22 – Assign questions to teams

Assigning individual questions to a team.

To expand the questions for a section select the > sign to the left of the section name: Refer to the red highlight in **Figure 23**.

ASSIGN QUESTIONS TO TEAMS

TEAM A

- > ☒ SECTION A
- > ☒ SECTION B
- > ☐ SECTION C
- > ☐ SECTION D
- > ☐ SECTION E

TEAM B

- > ☐ SECTION A
- > ☐ SECTION B
- > ☒ SECTION C
- > ☒ SECTION D
- > ☒ SECTION E

ASSIGN

Figure 23 – Expanding questions

Once the questions have been expanded, individual questions can be selected. Refer to **Figure 24**

Note that if all questions are selected for a section. The section tick box will also be selected.

ASSIGN QUESTIONS TO TEAMS

TEAM A

- ☐ SECTION A
 - ☒ 1 Describe your organisation's experience in the design, development and implementation of asset manag ...
 - ☒ 2 Describe your organisation's experience in the on-going operation, support and maintenance of your p ...
 - ☒ 3 Describe the exact role, experience and rationale for any sub-contracted organisations that your pro ...
 - ☒ 4 Describe your experience of operating in New Zealand, with particular reference to establishment of ...
 - ☐ 5 Describe your organisation's structure including the level of staffing in key areas relevant to the ...
 - ☐ 6 Describe your organisation's commitment to and approach for development of innovative solutions, inv ...
- > ☒ SECTION B
- > ☐ SECTION C
- > ☐ SECTION D
- > ☐ SECTION E

TEAM B

- > ☐ SECTION A
- > ☐ SECTION B
- > ☒ SECTION C
- > ☒ SECTION D
- > ☒ SECTION E

ASSIGN

Figure 24 – Assign questions to teams

The next step is to ASSIGN EVALUATORS TO TEAMS.

ASSIGN EVALUATORS TO TEAMS

In the ASSIGN EVALUATORS TO TEAMS screen you will see all your evaluators listed under each team. You then click on the tick-box beside the appropriate Evaluator under each team.

Note – Evaluators can be assigned to more than one team.

ASSIGN EVALUATORS TO TEAMS

TEAM A

- ☒ John Smith
- ☒ Sample Person

TEAM B

- ☒ John Smith
- ☒ Sample Person

ASSIGN

Figure 25 – Assign evaluators to teams

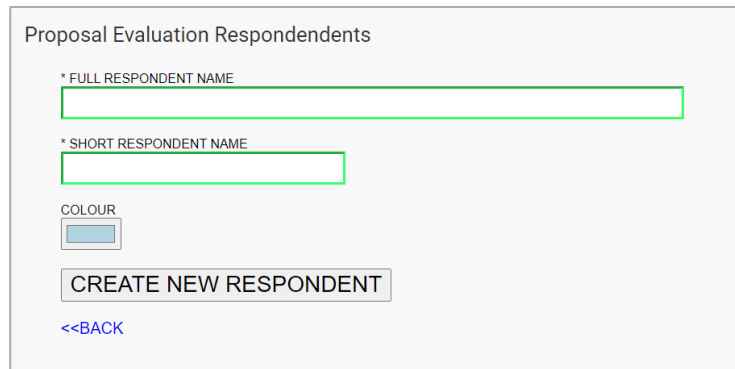
Once you have completed your assignment, you are ready to setup RESPONDENTS.

RESPONDENTS

When you click on RESPONDENTS you will see the PROPOSAL EVALUATION RESPONDENTS screen where you can click on **CREATE NEW RESPONDENT**.

You will then be asked to enter FULL RESPONDENT NAME, a shortened version of their name which will show on the scoring sheet for Scorers, and a COLOUR for that respondent. Once you've entered all the details click on CREATE NEW RESPONDENT.

The colour will appear as background on the score sheet that evaluators use. It is advisable to use light pastel colours that are unique to the respondent and you should think about selecting a colour that is close to the respondents branding colours to make identification easy for evaluators.



Proposal Evaluation Respondents

* FULL RESPONDENT NAME

* SHORT RESPONDENT NAME

COLOUR

CREATE NEW RESPONDENT

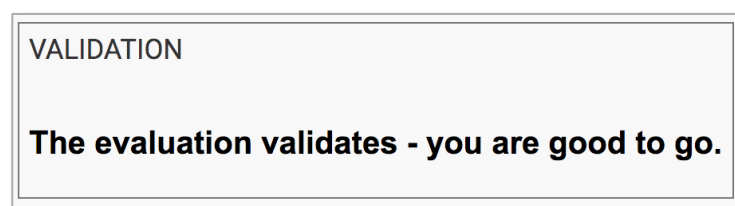
<<BACK

Figure 26

Validation

When you click on VALIDATE it will check to see if everything has been setup correctly. If it has not, it will tell you that there was a PRE VALIDATION ERROR and explain what has gone wrong. You can then go back and correct the error and try to validate again.

If you have done everything correctly, you will get the VALIDATION message.



VALIDATION

The evaluation validates - you are good to go.

Figure 27

RUNNING AN EVALUATION

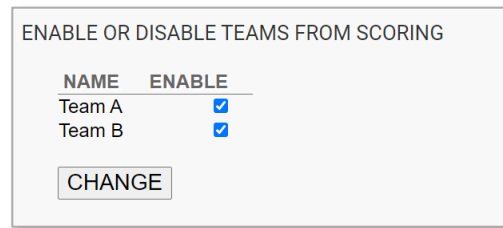
During an evaluation there are tasks that can be performed that help and enable the running of the evaluation. Individual evaluators cannot start unless both their team and the phase has been enabled. This gives the administrator control over exact start times and can also prevent scores being changed once an phase or evaluation has been completed.

Enable / Disable Teams

Teams of evaluators as defined and setup in TEAMS on page 22, are by default already enabled. If you want to disable a team, select the ENABLE / DISABLE TEAMS from the run screen as depicted in the RUN EVALUATION screen.

To re-enable a team, select the same ENABLE / DISABLE TEAMS from the run screen and enable the teams you wish to start scoring.

When an evaluation is presented to an evaluator, if the team they are on for the enabled phase is NOT enabled, they will not be presented with the questions in that team for evaluation.



NAME	ENABLE
Team A	<input checked="" type="checkbox"/>
Team B	<input checked="" type="checkbox"/>

CHANGE

Figure 28 – Enable/Disable Teams

Enable Phase or Change Status

Before scoring can start, a phase must be enabled. All phases by default are set to a state of “Defined” or “Not Started”.

Phases have 3 states:

1. Defined or Not Started
2. Enabled or started
3. Complete

Note: A phase cannot be changed to a state of complete unless all questions from all evaluators have been given a score.

To change a phase status, select ENABLE PHASE OR CHANGE STATUS from the RUN EVALUATION main menu, use the dropdown status for each phase and select the CHANGE button.

CHANGE EVALUATION PHASE STATUS

INITIAL
PROGRESS STATUS: Enabled

MODERATION 1
PROGRESS STATUS: Defined (Not Started)

FINAL
PROGRESS STATUS: Defined (Not Started)

CHANGE

Figure 29 – Phase status

View Progress

To view progress during scoring, select **VIEW PROGRESS** from the RUN EVALUATION screen main menu. This will display on the screen in graphic form the progress of each phase/ team and evaluator.

A series of charts are displayed for each evaluator and phase depicting the progress being made:

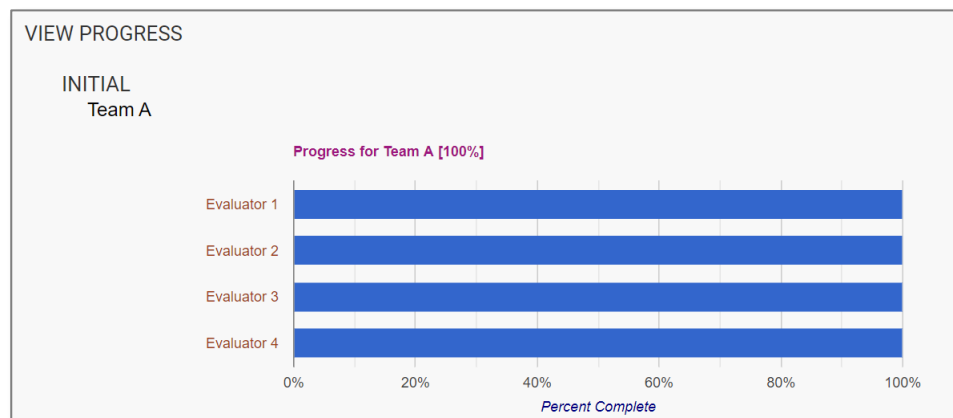


Figure 30 – Example progress chart

Moderation aid Spreadsheet

This sub section exports a spreadsheet that can be used for moderation where min/max and range of scores are given.

See also **Moderation Reports** in section **Report Manager** on page 28

Screen Reports

Under this selection are three very simple on-screen reports:

Team Reports

Lists the raw scores for each team.

Results

Show the completed weighted results

Evaluation Report

Provides a short summary with scores of the complete evaluation.

Report Manager

The report manager lists a series of reports that can be run by the administrator. Some reports are only able to be run when phases are either started or completed. The Final report for example can only be run when all phases are complete.

Individual Evaluation Report

This report can ONLY be run by an evaluator and is accessible only by a button on the bottom of the score page. This report details all the scores entered to date and comments associated with each score, for the purposes of an evaluator review.

Configuration Report

The configuration report shows the evaluation questions, sub-attributes and weightings as loaded into the system. This is typically run to check that everything has been loaded correctly.

Progress Report

A simple report used to take a snapshot in time and show progress in scoring at a specific time during the different phases.

Team Report

Designed for a single score phase and shows the raw scores for each team. Individual scores are not shown in this report if the phase was not a single score phase.

Phase Report

Details the scores given in a phase. The scores are weighted scores separated by sections and questions. This report also produces evaluator and phase timings such as when an evaluator started and completed, how long they took to score etc.

Evaluator Bias Report

This report attempts to mathematically calculate and see if there is any bias for any evaluator. There must be at least 3 evaluators for a phase before this report is effective. In general evaluators will score either on the higher or lower side from other evaluators. This is normal and the engine behind this report will normalise the scores first before looking for bias, thus allowing for normal evaluator scoring behaviour. However, the report looks to see if there is a swing towards or away from a specific respondent by any evaluator.

CAUTION: A swing or bias from one evaluator can cause the opposite swing against another albeit less.

Moderation Reports

The moderation report produces a report for each evaluator to be used in moderation. The report shows for each evaluator:

- Their own score for each question and sub-attribute
- Their own comments
- The minimum/maximum/range of score given by other in their team
- A graphical illustration of where their own score lies.

Final Report

The final report can only be run when all phases are completed. This report give graphs and scores on:

- Results from each phase
- Evaluator progress graphs
- Comparisons of scores between phases
- Final rankings

UTILITIES

Score Migration

Sometimes it is necessary to copy the scores and comments from one phase to another. An example may between two moderation phases, where the next phase starts off with a base from the previous.

The score migration utility allows you to copy scores and comments from one phase/team and place them into another.

From this utility screen you choose the Source Phase, and then select the destination phase and evaluator. Be default this will only copy the scores if a score does not yet exist in the destination phase. This can be overridden by selecting the override tick box.

Figure 31

MAINTENANCE

This section allows you to perform specific maintenance on the system.

Backup and Restore

From here you can create and download your own secure backups.

To create your own backup:

1. Select the BACKUP DATABASE tick box.

2. Select the BACKUP button

This will create an encrypted backup file which should be downloaded to your device. Ensure you keep this file safe.

To restore from a previous backup:

1. Select the choose file button under restore.
2. Locate and select a previous backup file and press Open
3. Select the RESTORE button.

WARNING: This will override all data in the system and replace it with the data that was captured by the backup.

Note: The system creates a backup every hour that the support team at nVALUATE are able to use to recover your system.

View available backups

This allows you to view and download a copy of all automatic system look at all system backups.

Complete dump to Excel

This will dump all scores for all phases into a single spreadsheet that can be used for your own use.