

Setting Up Criteria For Scoring Submissions

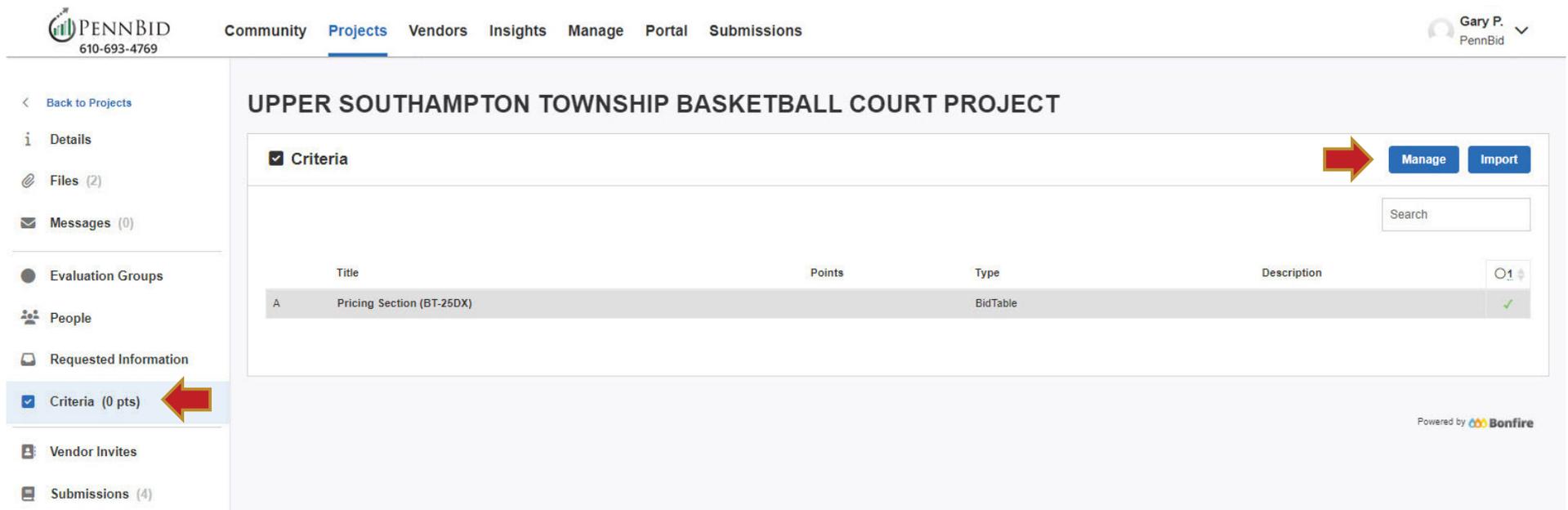
How to Create New Criteria

Criteria Setup – the process of setting up your organization’s parameters for analysis in selecting a responsive/responsible bidder.

Set up **Evaluation Groups** prior to adding or importing **Criteria** (for set up assistance, see “**Evaluation Groups Section**” (pg 12) of the [New Project Setup \(Single Contract Projects\) Guide](#)).

Select **Criteria** in the dashboard of the project.

Depending on the amount of **Criteria** you plan to add; select **Manage** to input manually or select **Import** to upload your pre-generated Excel list containing larger quantities of requirements. If you require criteria to be reviewed independently by different individuals, additional evaluation groups need to be added before you begin working on the **Criteria** section.

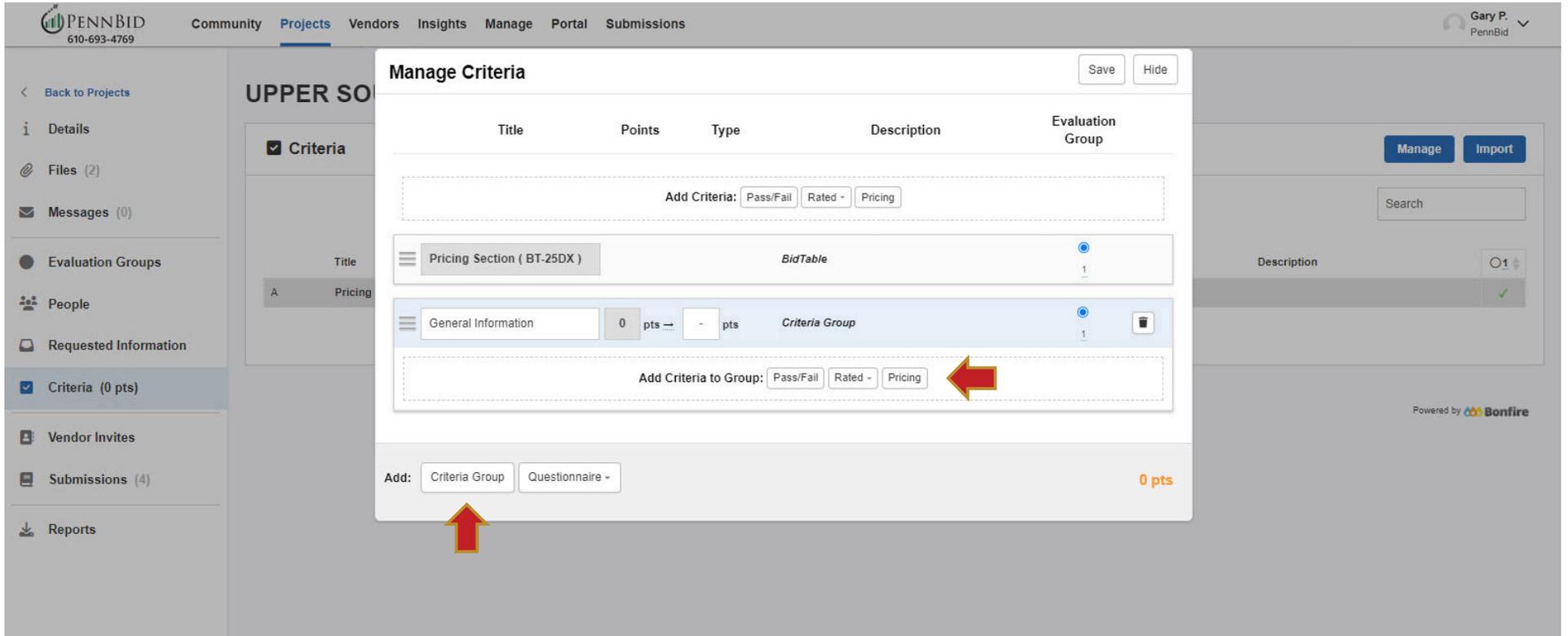


The screenshot displays the PENNBID web application interface. At the top left is the PENNBID logo with the tagline 'eProcurement Evolutionized'. The top navigation bar includes 'Community', 'Projects' (highlighted), 'Vendors', 'Insights', 'Manage', 'Portal', and 'Submissions'. On the top right, the user 'Gary P. PennBid' is logged in. The left sidebar contains navigation options: 'Back to Projects', 'Details', 'Files (2)', 'Messages (0)', 'Evaluation Groups', 'People', 'Requested Information', 'Criteria (0 pts)' (highlighted with a red arrow), 'Vendor Invites', and 'Submissions (4)'. The main content area is titled 'UPPER SOUTHAMPTON TOWNSHIP BASKETBALL COURT PROJECT' and shows a 'Criteria' section with a table. A red arrow points to the 'Manage' and 'Import' buttons. The table has columns for 'Title', 'Points', 'Type', and 'Description'. One row is visible: 'A Pricing Section (BT-25DX)' with 'BidTable' as the type and a green checkmark in the 'Description' column. A search bar is located above the table. The bottom right corner of the interface indicates 'Powered by Bonfire'.

Manage Set Up

Create **Criteria Group(s)** to cluster similar evaluation information.

Choose a criteria type (**Pass/Fail, Rated, Pricing**).



The screenshot displays the 'Manage Criteria' modal window. The table contains the following data:

Title	Points	Type	Description	Evaluation Group
Add Criteria: Pass/Fail Rated Pricing				
Pricing Section (BT-25DX)		BidTable		1
General Information	0 pts → - pts	Criteria Group		1
Add Criteria to Group: Pass/Fail Rated Pricing				

At the bottom of the modal, the 'Add:' section shows 'Criteria Group' and 'Questionnaire -' buttons. A red arrow points to the 'Criteria Group' button. Another red arrow points to the 'Add Criteria to Group' button in the table.

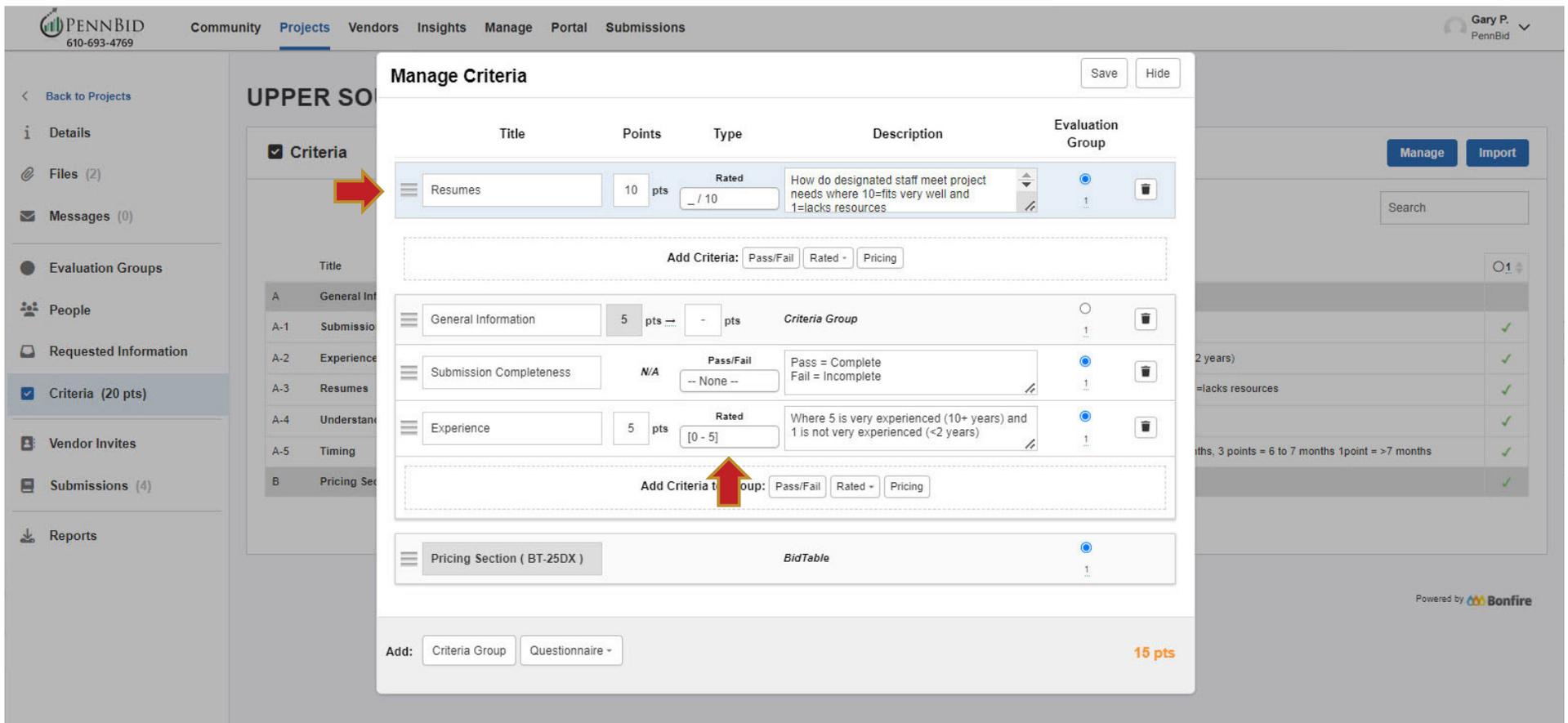
Fill in **Title** and **Description**.

For **Rated Type Criteria**, select the desired **Scale** or **Input** and assign subsequent point value.

Select an appropriate **Evaluation Group** designated to review the item.

Use the three bars next to each **Criteria** item to drag it into the appropriate **Criteria Group**.

Click the **Save** button to populate the **Criteria** into your **Project**.



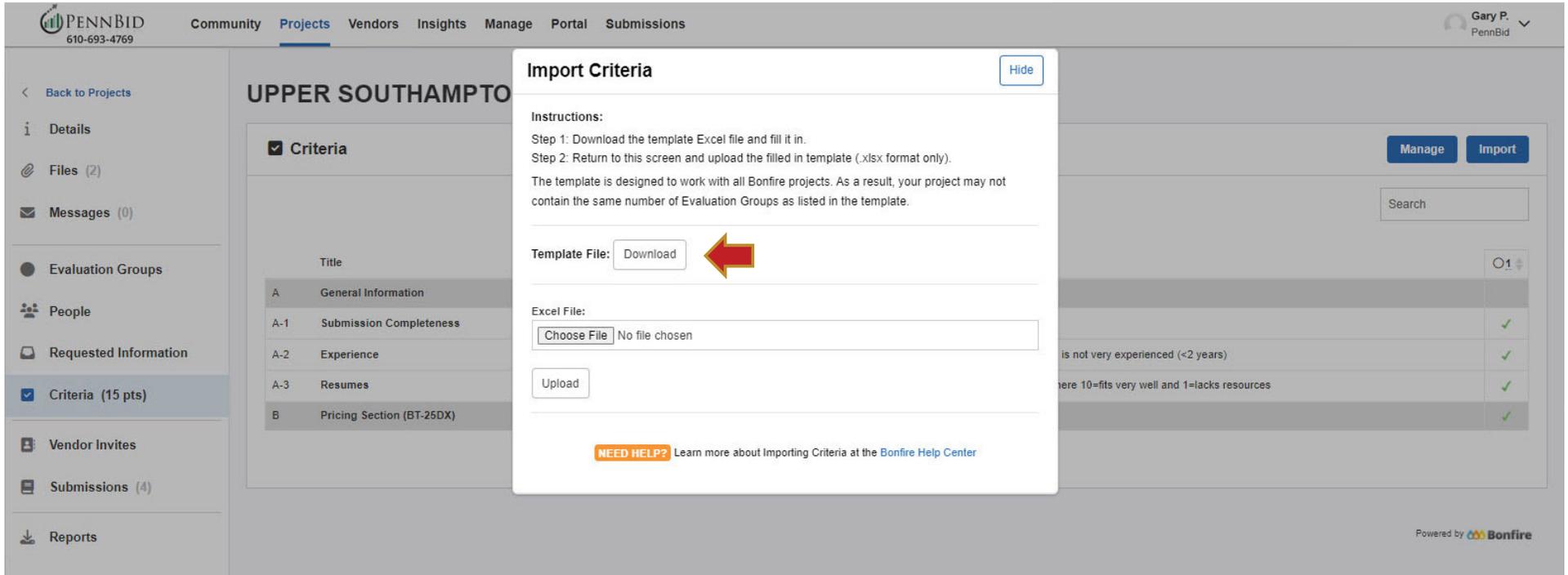
Manage Criteria

Title	Points	Type	Description	Evaluation Group
Resumes	10 pts	Rated	How do designated staff meet project needs where 10=fits very well and 1=lacks resources	1
Add Criteria: Pass/Fail Rated - Pricing				
General Information	5 pts	- pts	Criteria Group	1
Submission Completeness	N/A	Pass/Fail	Pass = Complete Fail = Incomplete	1
Experience	5 pts	Rated	Where 5 is very experienced (10+ years) and 1 is not very experienced (<2 years)	1
Add Criteria to Group: Pass/Fail Rated - Pricing				
Pricing Section (BT-25DX)			BidTable	1

Add: Criteria Group | Questionnaire - **15 pts**

Import Set Up

Download the Excel **Template File**. The file will include columns for data entry. While you do not need to use every column, each column has its own significance regarding to the scoring process.



The screenshot displays the PENNBID web interface. At the top, the navigation bar includes 'Community', 'Projects', 'Vendors', 'Insights', 'Manage', 'Portal', and 'Submissions'. The user 'Gary P. PennBid' is logged in. The main content area shows a project titled 'UPPER SOUTHAMPTON' with a 'Criteria' section. A modal window titled 'Import Criteria' is open, providing instructions for importing a template. The instructions state: 'Step 1: Download the template Excel file and fill it in. Step 2: Return to this screen and upload the filled in template (.xlsx format only). The template is designed to work with all Bonfire projects. As a result, your project may not contain the same number of Evaluation Groups as listed in the template.' Below the instructions, there are two file selection fields: 'Template File' with a 'Download' button (highlighted by a red arrow) and 'Excel File' with a 'Choose File' button and 'No file chosen' text. An 'Upload' button is located below the Excel file field. At the bottom of the modal, there is a 'NEED HELP?' link pointing to the Bonfire Help Center. The background project page shows a table of criteria with columns for 'Title', 'Description', and 'Status'. The criteria listed are: 'General Information', 'Submission Completeness', 'Experience', 'Resumes', and 'Pricing Section (BT-25DX)'. The 'Status' column shows green checkmarks for all criteria.

Criterion/Group – This drop down indicates if this line will be a Criteria Group Label or a criterion line within the group.

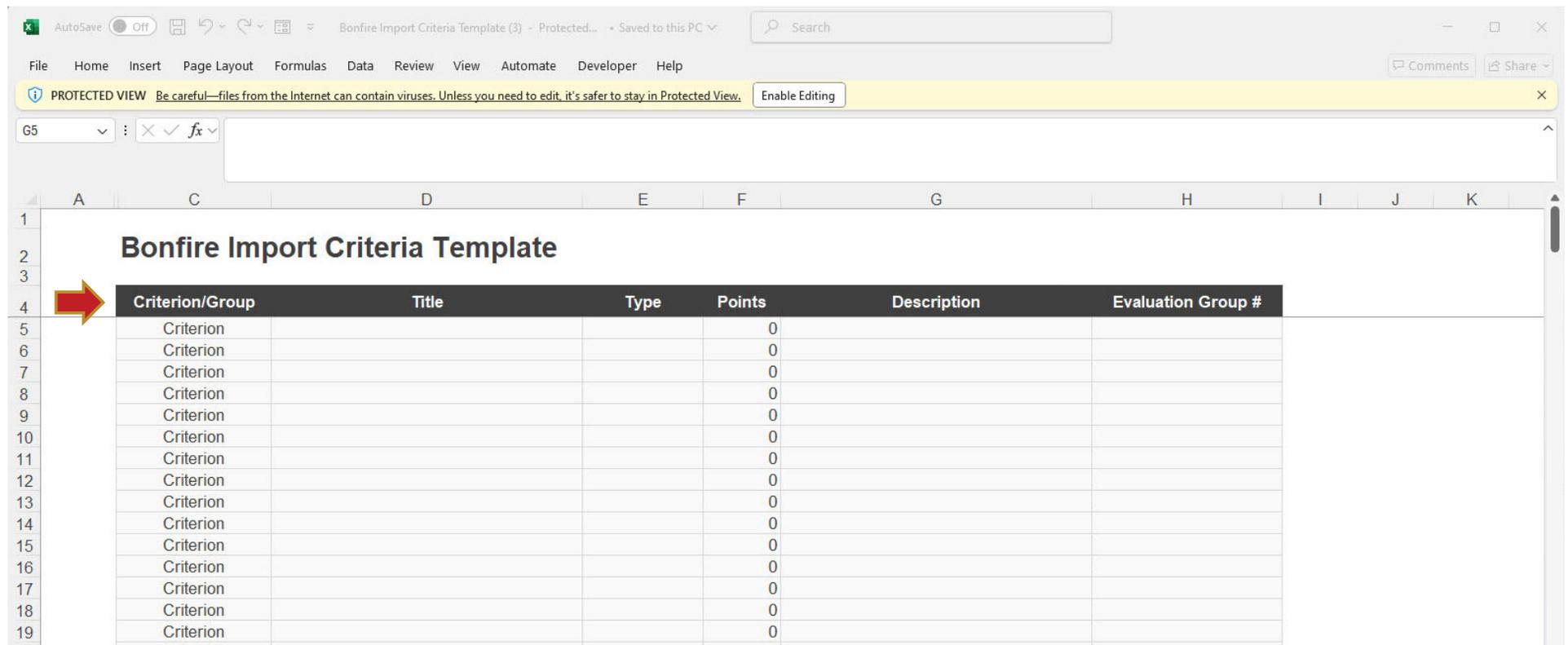
Title – If you have selected this line to be the Criteria Group title line, you will want to enter your group title. If you have selected the criterion line item, you will want to enter the title of what is being evaluated.

Type - Drop down selection for type of criteria scoring (Pass/Fail, Rated, Pricing)

Points – Provide point value (N/A for pass/fail)

Description – This is where you will go into detail on how the evaluator will be scoring this line (*optional column*)

Evaluation Group - Drop down selection from pre-established Evaluation Group(s)

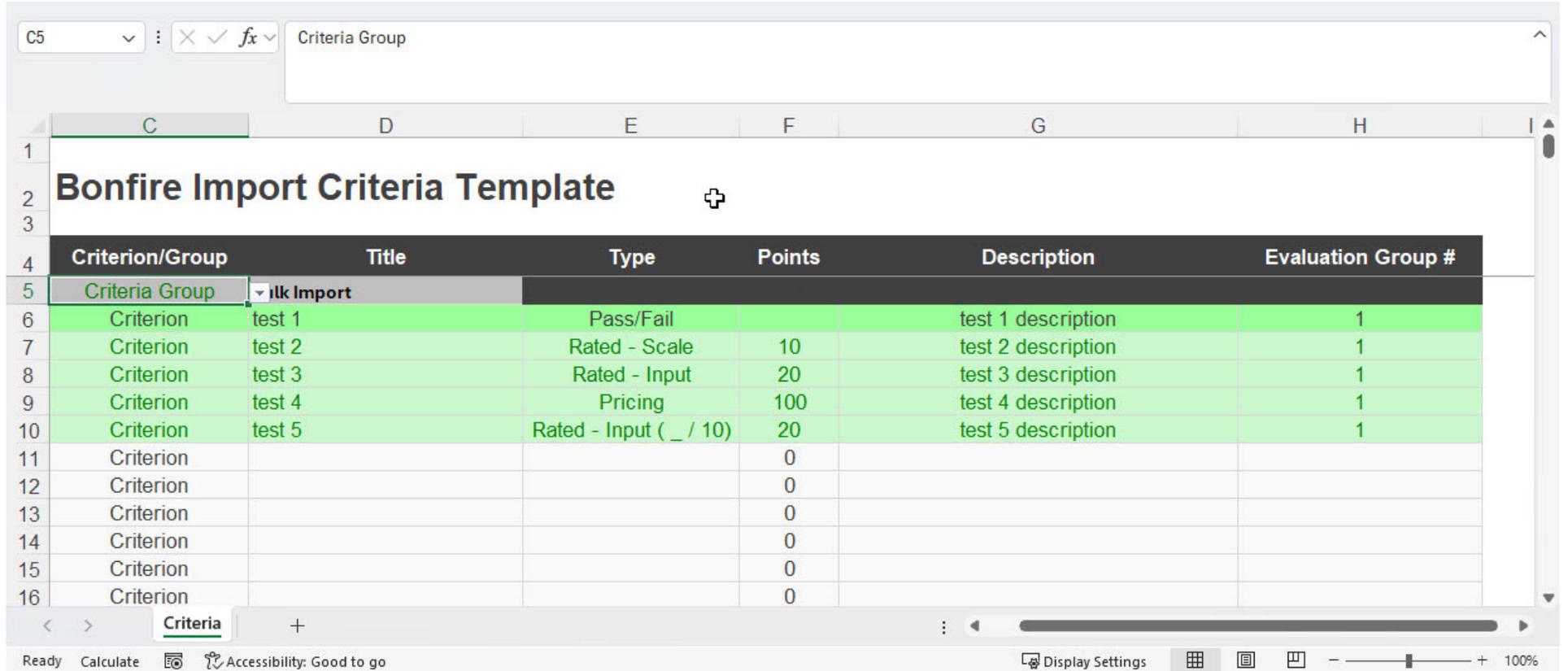


The screenshot shows an Excel spreadsheet titled "Bonfire Import Criteria Template". The spreadsheet is in Protected View. The columns are labeled as follows:

Criterion/Group	Title	Type	Points	Description	Evaluation Group #
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		

Once the **Criterion** line is satisfied, the entire row will **turn green**. Once the criteria group line is satisfied, the row will become grayed out.

Notice: It is important not to delete any rows. Deleting any rows will give you an error code and you will not be able to import your data.



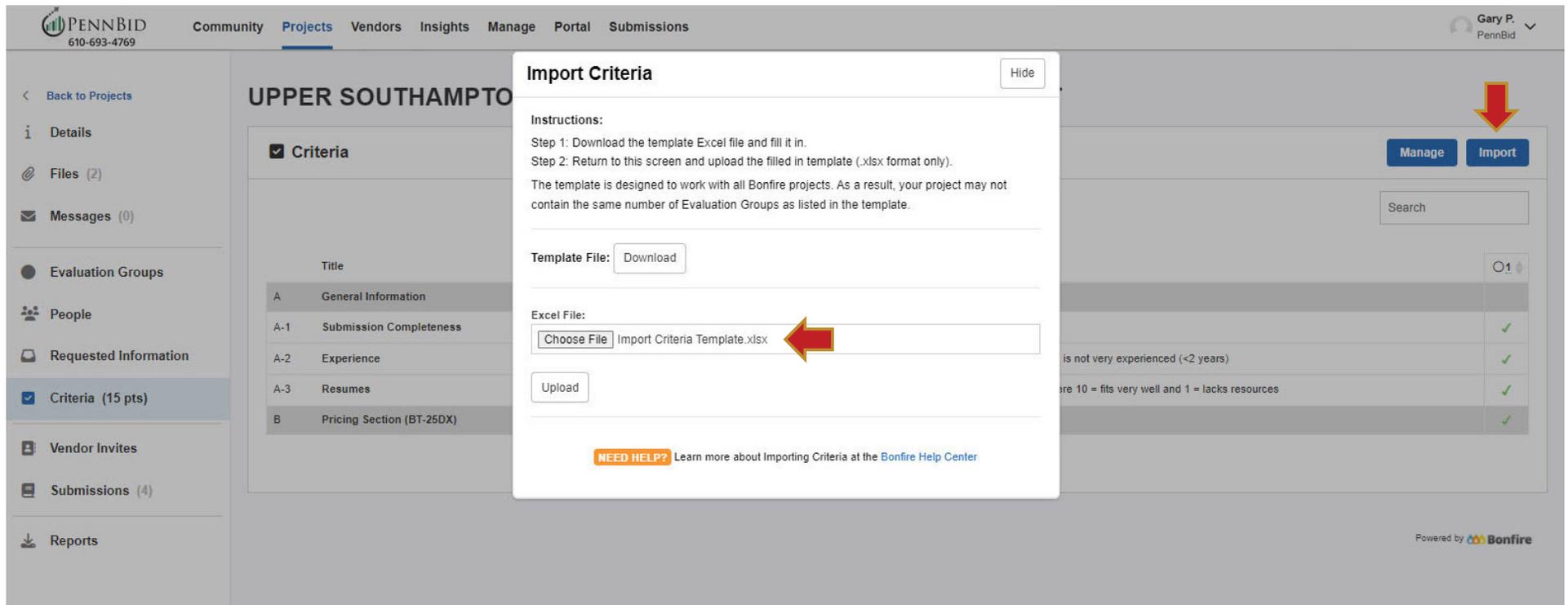
Criterion/Group	Title	Type	Points	Description	Evaluation Group #
Criteria Group	ITK Import				
Criterion	test 1	Pass/Fail		test 1 description	1
Criterion	test 2	Rated - Scale	10	test 2 description	1
Criterion	test 3	Rated - Input	20	test 3 description	1
Criterion	test 4	Pricing	100	test 4 description	1
Criterion	test 5	Rated - Input (_ / 10)	20	test 5 description	1
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		
Criterion			0		

Select **Import**, follow instructions in the pop-up and upload saved template file.

Additional **Criteria** can be added by clicking the **Manage** button and returning to the **Manage Criteria** screen.

Reviewers can be added at any time and assigned to the appropriate **Evaluation Group**.

Note: *If you are choosing to add scoring to a Questionnaire, please contact the PennBid office for assistance.*



The screenshot displays the PennBid web interface. The top navigation bar includes 'Community', 'Projects', 'Vendors', 'Insights', 'Manage', 'Portal', and 'Submissions'. The user is logged in as Gary P. PennBid. The main content area shows the 'UPPER SOUTHAMPTON' project details, with a sidebar on the left containing navigation options like 'Back to Projects', 'Details', 'Files (2)', 'Messages (0)', 'Evaluation Groups', 'People', 'Requested Information', 'Criteria (15 pts)', 'Vendor Invites', 'Submissions (4)', and 'Reports'. The 'Criteria' section is active, showing a table with columns for 'Title' and 'Points'. The table lists criteria such as 'General Information', 'Submission Completeness', 'Experience', 'Resumes', and 'Pricing Section (BT-25DX)'. A pop-up window titled 'Import Criteria' is overlaid on the page. It contains the following text: 'Instructions: Step 1: Download the template Excel file and fill it in. Step 2: Return to this screen and upload the filled in template (.xlsx format only). The template is designed to work with all Bonfire projects. As a result, your project may not contain the same number of Evaluation Groups as listed in the template.' Below the instructions, there is a 'Template File:' section with a 'Download' button. An 'Excel File:' section has a 'Choose File' button and a text input field containing 'Import Criteria Template.xlsx'. A red arrow points to the 'Choose File' button. Below the input field is an 'Upload' button. At the bottom of the pop-up, there is a 'NEED HELP?' link and a reference to the 'Bonfire Help Center'. In the background, the 'Manage' and 'Import' buttons are visible, with a red arrow pointing to the 'Import' button. A search bar and a table with a 'Q1' column are also visible in the background.

Should you have any questions or require assistance, please contact PennBid at info@pennbid.net, or **610-693-4769**.