Assign Evaluation Committee

Training Document

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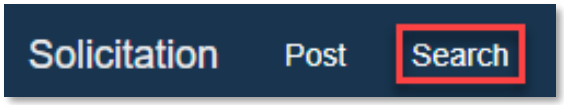
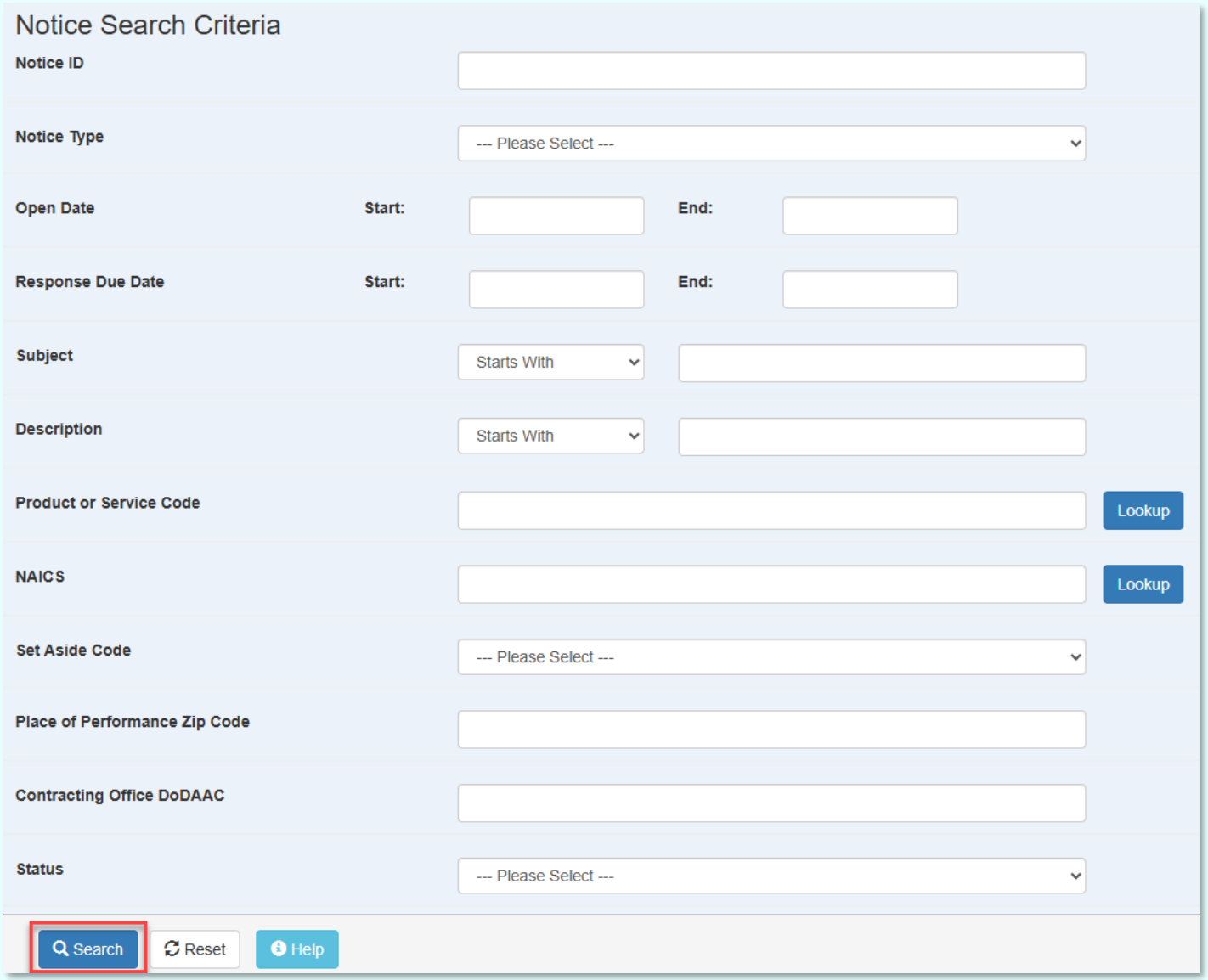
Roles	Solicitation Roles with the capability to assign Evaluation Committee Members: • Solicitation Manager
User Navigation	Log in to PIEE as a Solicitation Manager user to access the Solicitation Application. Click **Search** on the Solicitation navigation bar at the top of the screen.  
Notice Search Criteria	Enter data in the Notice Search Criteria fields. Click **Search**. The user is led to the Search Results screen displaying results that match the criterion entered.



Search Fields:

- Notice ID (***up to 127 alphanumeric characters including special characters***)
- Notice Type (***options: Special Notice / Solicitation / Combined Synopsis/Solicitation / Presolicitation / Sources Sought / Consolidate/(Substantially) Bundle / Justification and Approval / Award Notice***)
- Open Date (***subfields: Start / End; format: YYYY/MM/DD***)
- Response Due Date (***subfields: Start / End; format: YYYY/MM/DD***)
- Subject (***parameters: Starts With / Equal To / Contains / Ends With***)

- Description (***parameters: Starts With / Equal To / Contains / Ends With***)
- Product or Service Code (***must be valid codes in database***)
- NAICS (***must be valid codes in database***)
- Set Aside Code (***searchable drop-down***)
    - Total Small Business Set-Aside
    - Partial Small Business Set-Aside
    - 8(a) Set-Aside
    - Historically Underutilized Business (HUBZone) Set-Aside
    - Service-Disabled Veteran-Owned Small Business (SDVOSB) Set-Aside
    - Women-Owned Small Business (WOSB) Program Set-Aside
    - Economically Disadvantaged WOSB (EDWOSB) Program Set-Aside
    - 8(a) Sole Source
    - Historically Underutilized Business (HUBZone) Sole Source
    - Service-Disabled Veteran-Owned Small Business (SDVOSB) Sole Source
    - Women-Owned Small Business (WOSB) Program Sole Source
    - Economically Disadvantaged WOSB (EDWOSB) Program Sole Source
    - Local Area Set-Aside
    - Competitive 8(a)
    - Economically Disadvantaged Woman Owned Small Business
    - Emerging Small Business
    - HUBZone
    - Partial HBCU / MI
    - Partial Small Business
    - Service-Disabled Veteran-Owned Small Business
    - Total HBCU / MI
    - Total Small Business
    - Veteran-Owned Small Business
    - Woman Owned Small Business
- Place of Performance Zip Code *(**must be 5 numeric characters**)*
- Contracting Office DoDAAC (***must be 6 alphanumeric characters; excluding special characters)***
- Status (***options: Open / Closed / Incomplete / No Response Due Date***)

Buttons:

- Lookup (***button displays beside the 'Product or Service Code' and 'NAICS' fields; leads to Lookup search pop-ups***)
- Search (***leads to search criteria results screen***)
- Reset (***clears fields in search form***)
- Help (***displays help information***)

NOTE: If the user decides to search without any criterion, all Notices created in the database to which the user has access (regardless of status) are available for viewing in the search results.

*NOTE: '**Product or Service Code**' and '**NAICS**' codes are populated in field once selected from **Lookup** pop-up.*

Product or Service Code Lookup Pop-up:

To search for the Product or Service Code, click the **Lookup** button. A pop-up displays.

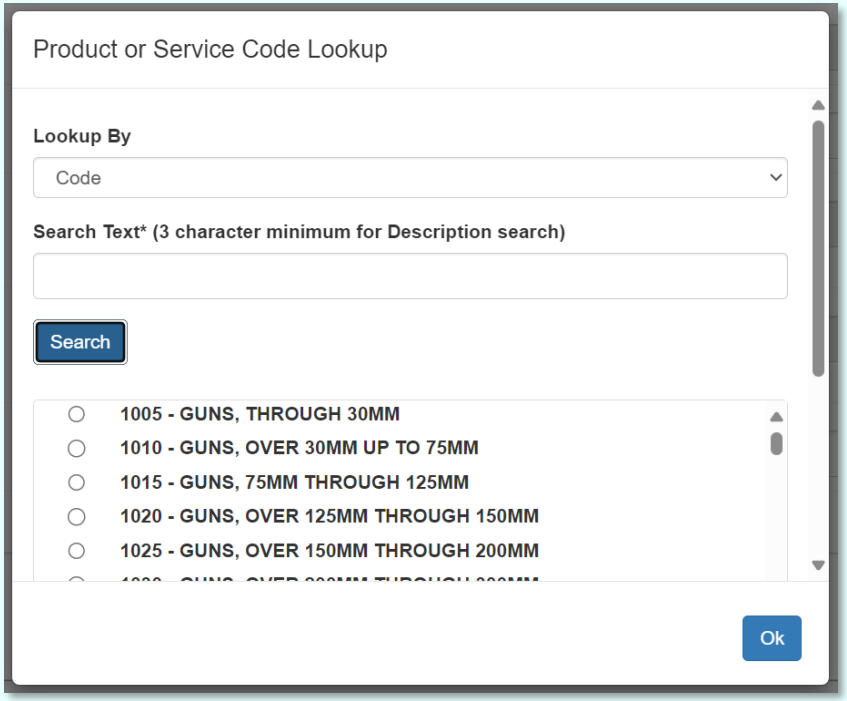
Enter required fields and click the **Search** button. The results for **Product or Service Code** appear at the bottom of the pop-up. Select a code and click **OK**.

Product or Service Code Lookup Pop-Up Fields:

- Lookup By (***option: Code / Description***)
- Search Text * (***user must enter at least 3 characters to search by "Description"; field can remain blank if searching by "Code"***)

Pop-Up Buttons:

- Search
- Ok (***closes the pop-up if fields are blank; if the PSC is selected, closes pop-up, and populates name in designated field***)



NOTE: If the Notice is for multiple goods or services, select the entry best describing the overall acquisition.

NAICS Lookup Pop-up:

To search for the NAICS, click the **Lookup** button. A pop-up displays.

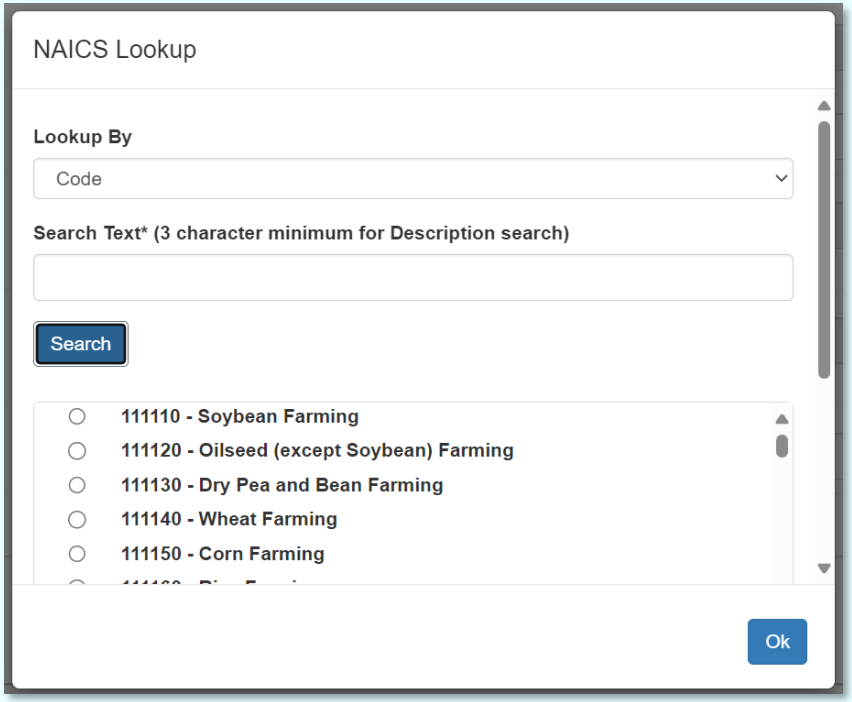
Enter required fields and click the **Search** button. The results for **NAICS** appear at the bottom of the pop-up. Select a code and click **OK**.

NAICS Lookup Pop-Up Fields:

- Lookup By (***options: Code / Description***)
- Search Text * (***user must enter at least 3 characters to search by "Description"; field can remain blank if searching by "Code"***)

Pop-Up Buttons:

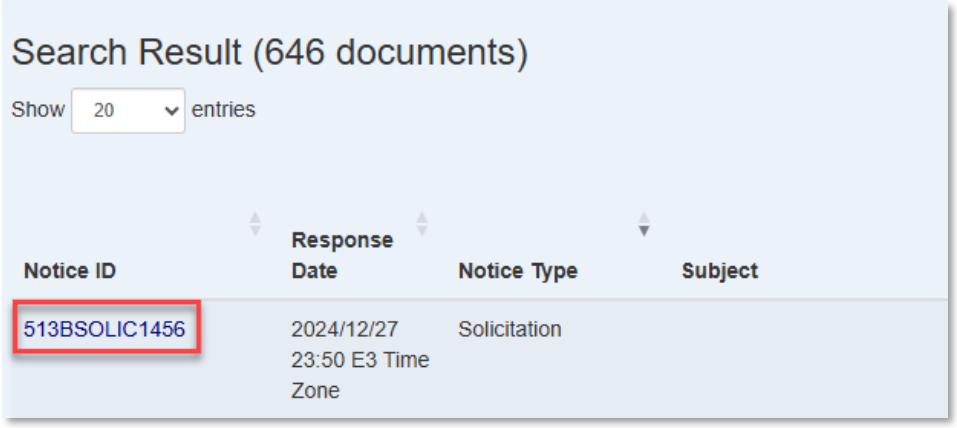
- Search
- Ok (***closes the pop-up if fields are blank; if the NAICS is selected, closes pop-up and populates name in designated field***)



NOTE: Select the entry best describing the overall acquisition for notices with multiple goods or services.

Search Results

Search Results appear on a new screen. Locate the notice of interest and click the **Notice ID** hyperlink to view. The notice of interest is displayed in a view-only format.



Search Result Header:

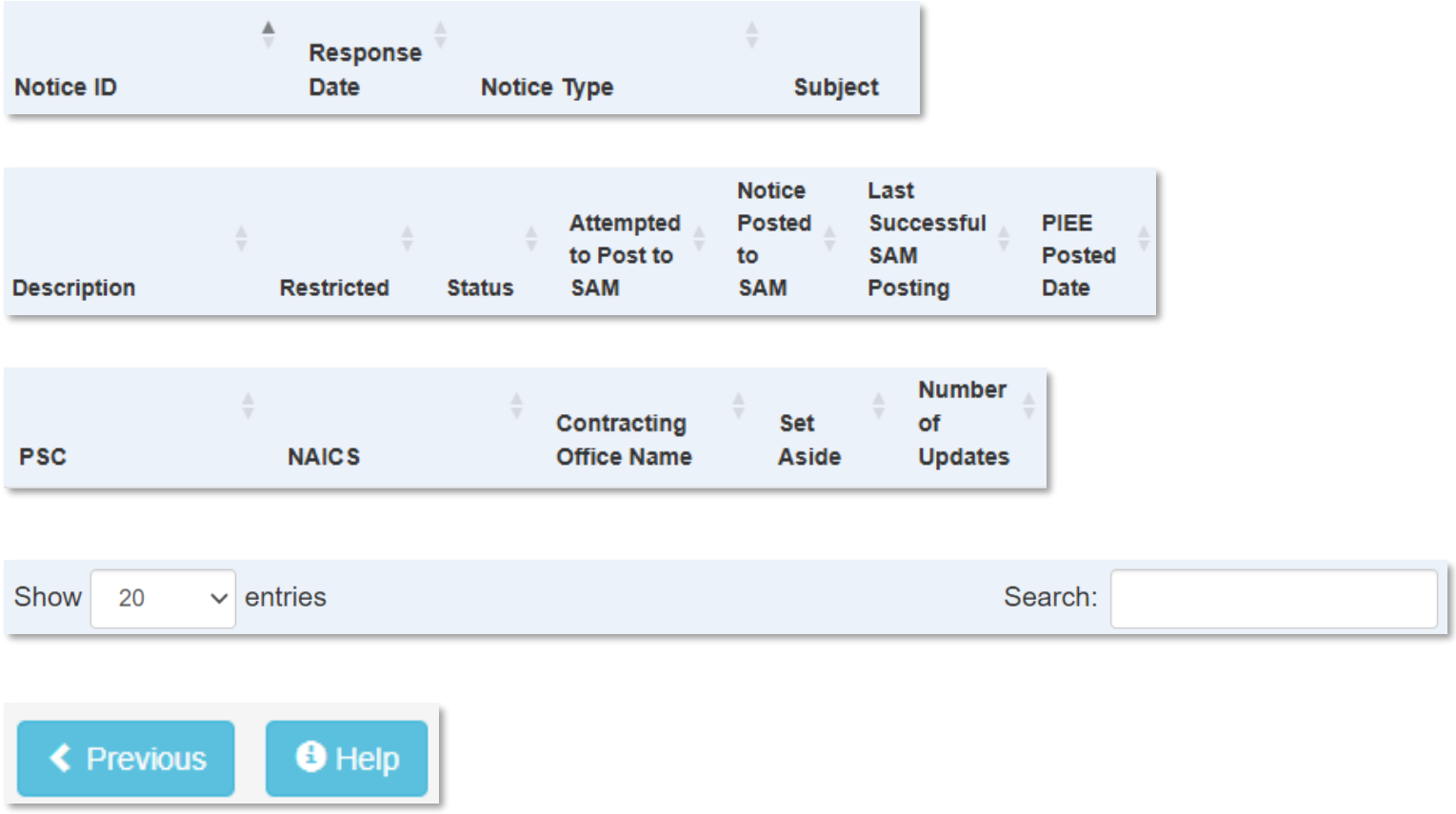
- Notice ID (***hyperlink***)
- Response Date
- Notice Type
- Subject
- Description
- Restricted
- Status
- Attempted to Post to SAM
- Notice Posted to SAM
- Last Successful SAM Posting
- PIEE Posted Date
- PSC
- NAICS
- Contracting Office Name
- Set Aside
- Number of Updates

Search Result Fields:

- Show # Entries (***options: 20 / 40 / 60 / 80 / 100; controls number of entries appearing on each page***)
- Search (***can filter results by keywords entered by the user***)

Buttons:

- Previous (***to navigate back to Create Notice screen***)
- Help (***displays help information***)

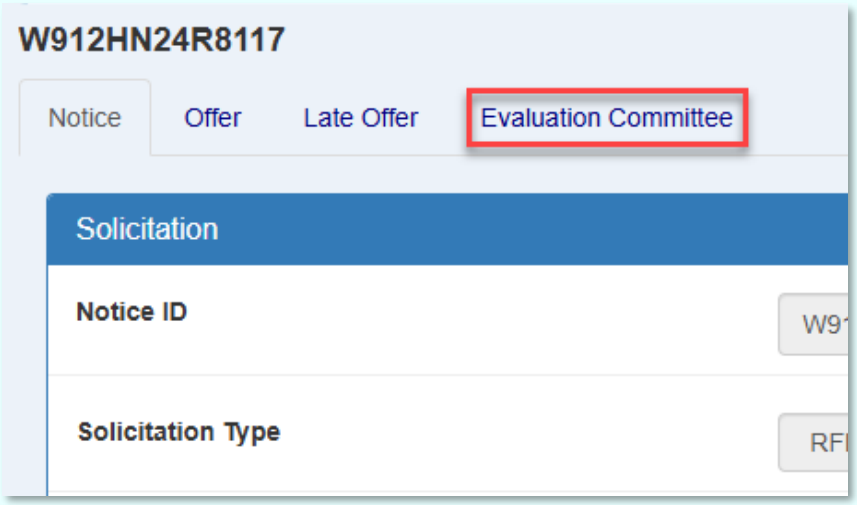


NOTE: Click the arrows next to the headers to sort in ascending/ descending order.

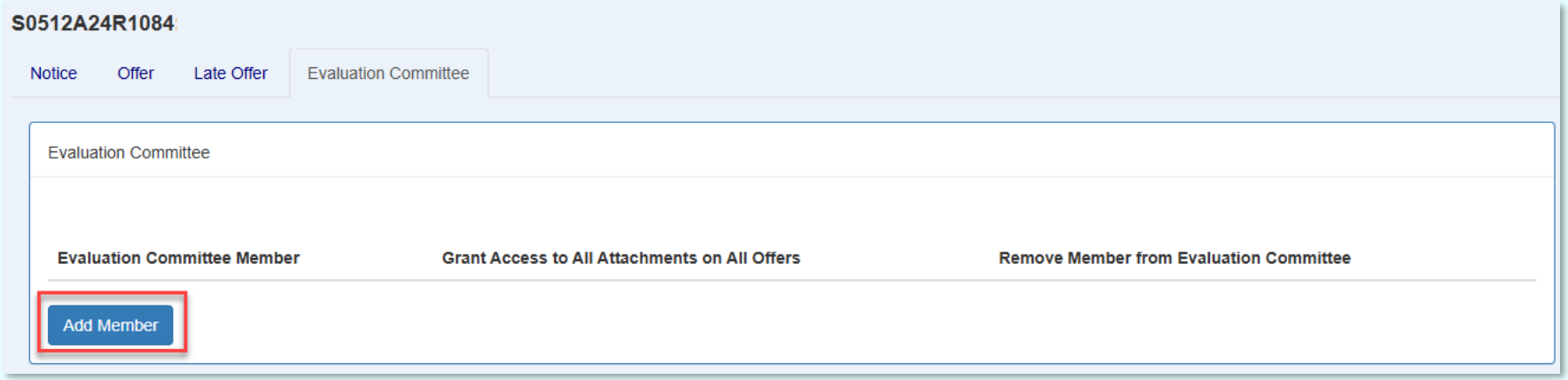
NOTE: If Related Notices have been posted, then only the latest related notice in the chain is visible in the search results.

Assign Evaluation	Click the **Evaluation Committee** tab underneath the Notice ID header. The user is led to the Evaluation Committee screen.

Committee Members

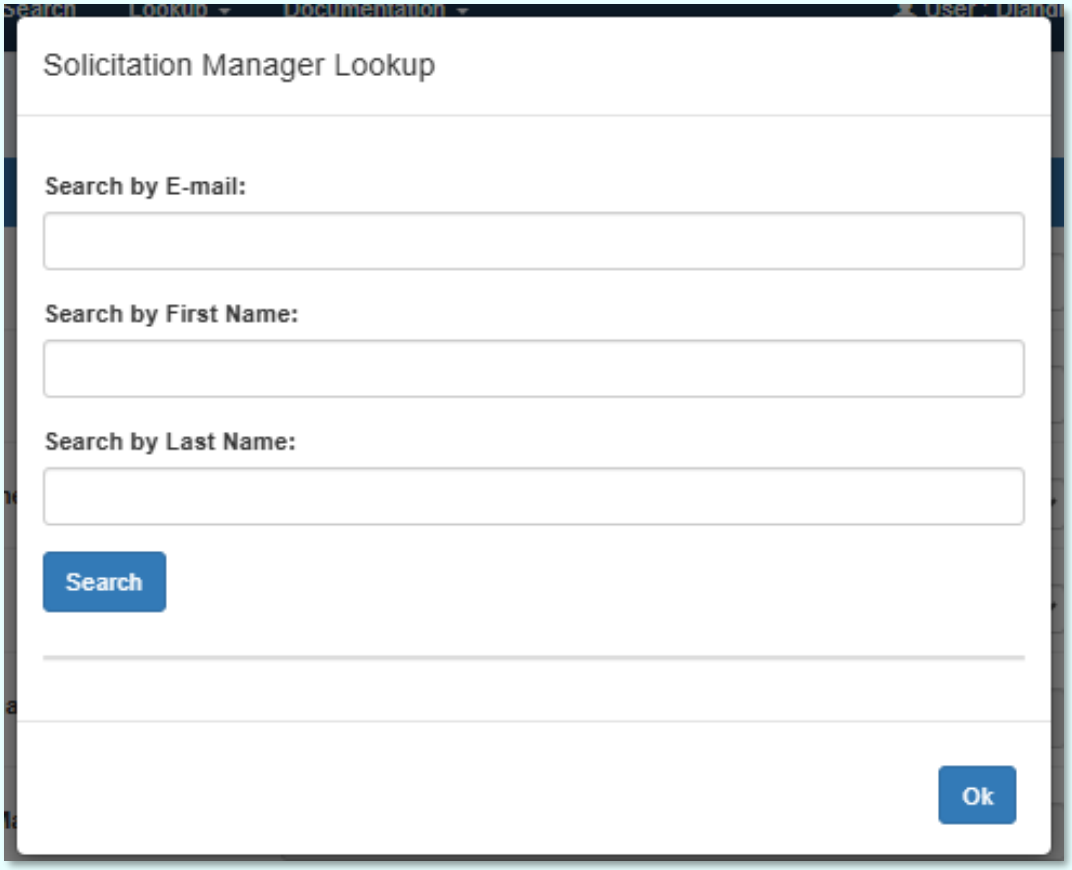


Click the **Add Member** button. The Solicitation Manager Lookup pop-up is displayed.



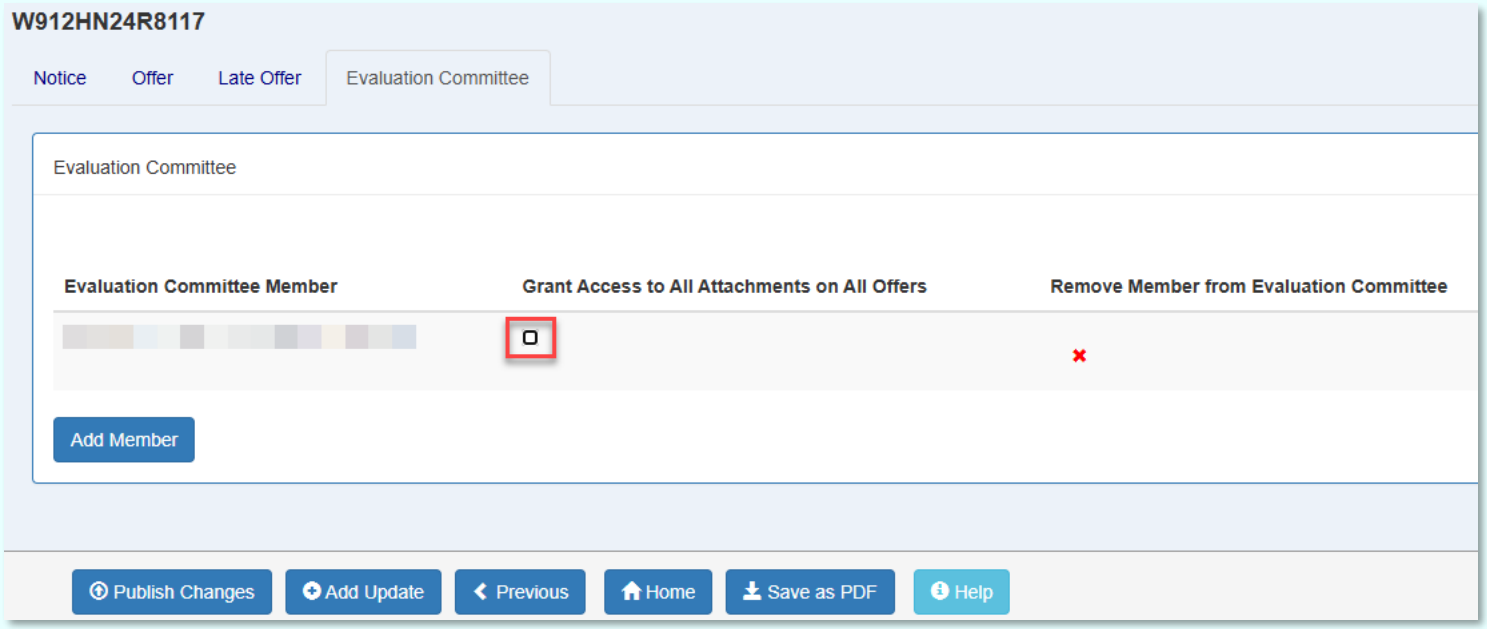
Solicitation Manager Lookup Pop-up:

Enter required fields and click the **Search** button. The results of active Solicitation Managers appear at the bottom of the pop-up. Select a Solicitation Manager and click the **Ok** Button.

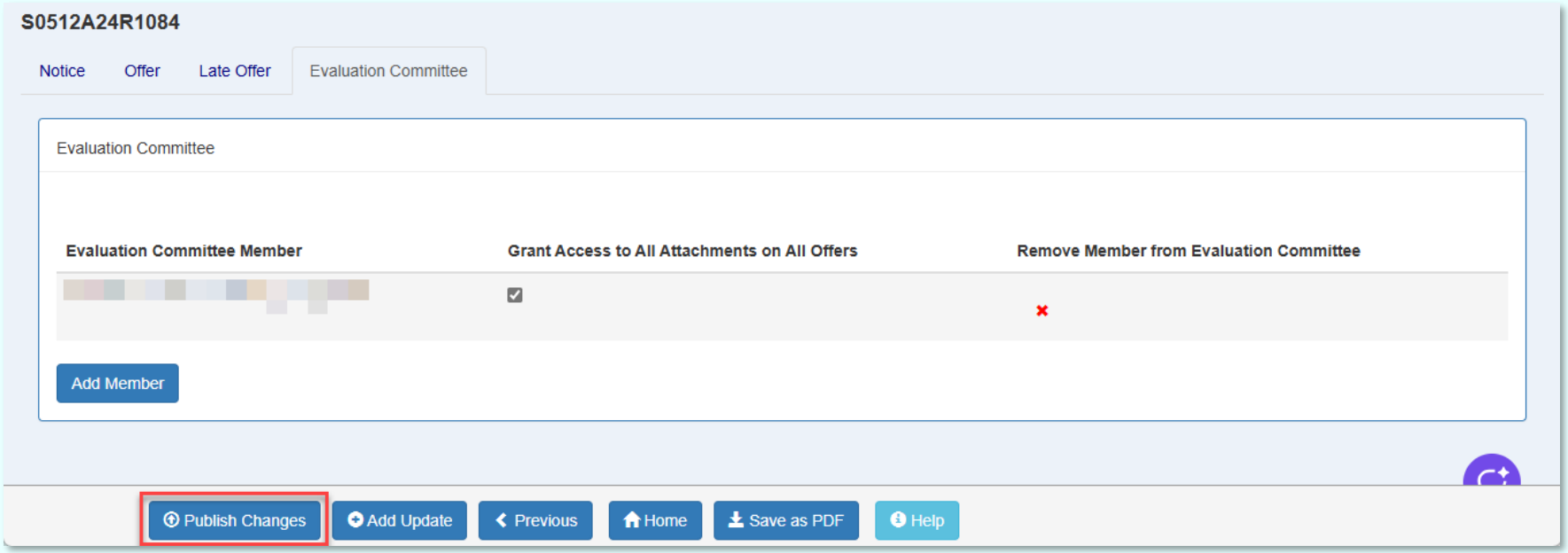


The selected Solicitation Managers are displayed in the Evaluation Committee table and have been added to the Evaluation Committee of the notice of interest. Multiple users can be added by clicking the **Add Member** button after each selected Solicitation Manager.

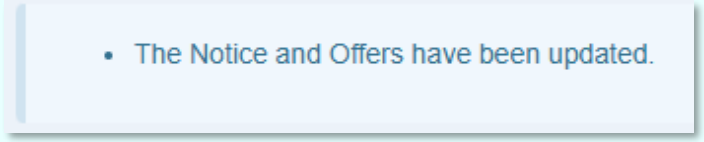
Click the checkbox under the **Grant Access to All Attachments on All Offers** header to allow the chosen Solicitation Manager access to all attachments on all submitted offers.



Click **Publish Changes** at the bottom of the screen to save Evaluation Committee Member selections.



Successfully adding Evaluation Committee Members displays a message at the top of the screen stating: “The Notice and Offers have been updated.”



Evaluation Committee Headers:

- Evaluation Committee Member
- Grant Access to All Attachments on All Offers
- Remove Member from Evaluation Committee

Solicitation Manager Lookup Pop-Up Fields:

- Search by Email
- Search by First Name
- Search by Last Name

Evaluation Committee Buttons:

- Grant Access To all Attachments (***checkbox***)
- Remove Member from Evaluation Committee (***red x icon***)
- Add Member (***leads to Solicitation Manager Lookup pop-up***)
- Publish Changes (***to publish changes***)
- Add Update (***to navigate to Post Update screen***)
- Previous (***to navigate back to the previous screen***)
- Home (***to navigate back to the Solicitation module home screen***)
- Save as PDF (***to download opened notice to local machine***)
- Help (***displays help information***)

Solicitation Manager Pop-Up Buttons:

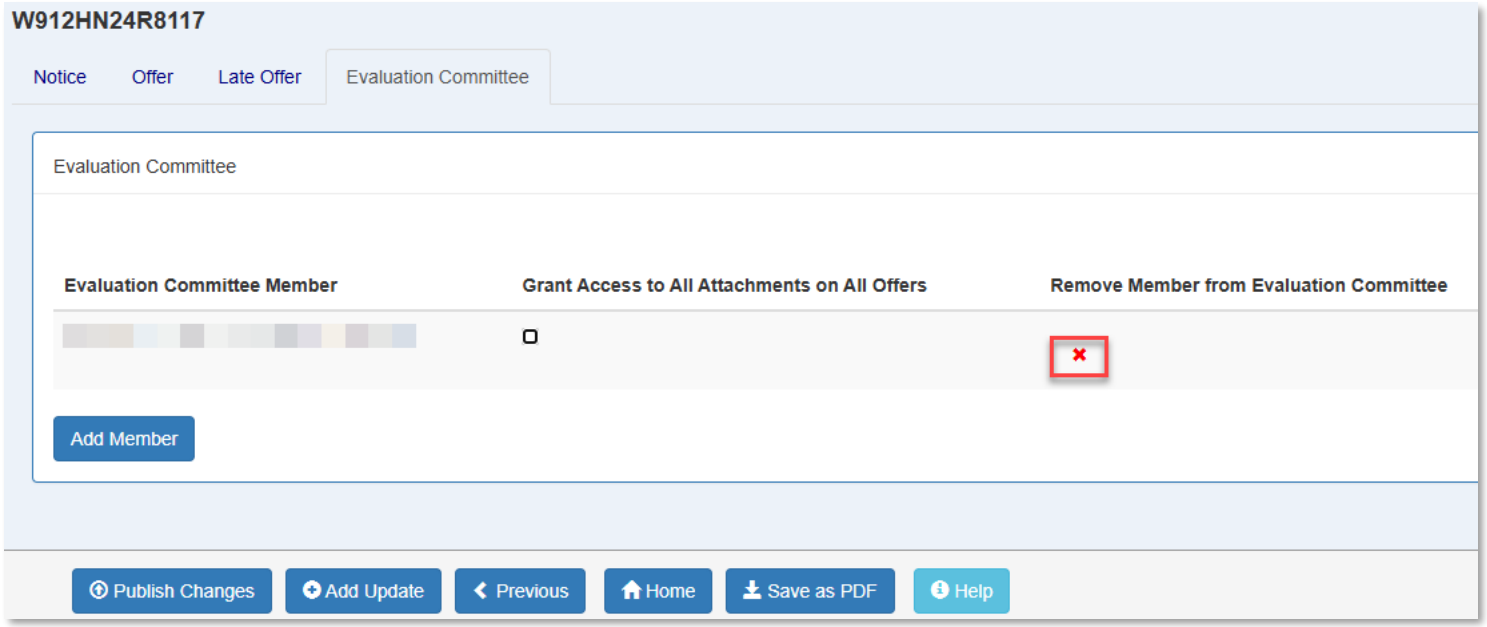
- Search
- Ok (***closes the pop-up if fields are blank; if the Solicitation Manager is selected, closes pop-up, and populates name in designated field***)

NOTE: Only Solicitation Managers that are active within the posting user’s DoDAAC may be selected.

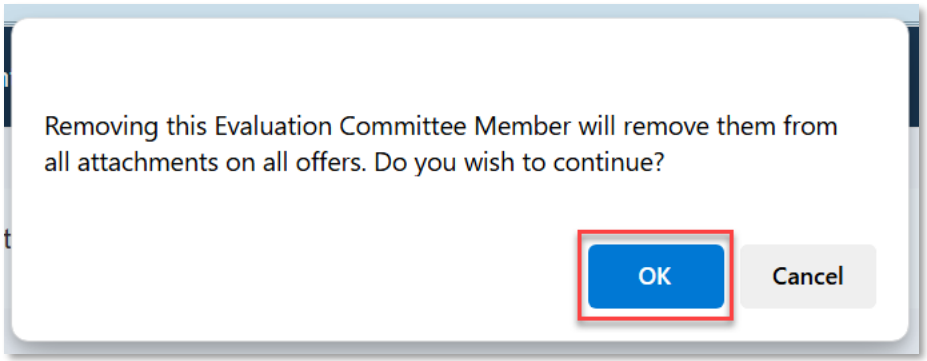
NOTE: The Evaluation Committee table is displayed if there has been offers submitted against the notice of interest.

Remove Evaluation Committee Members

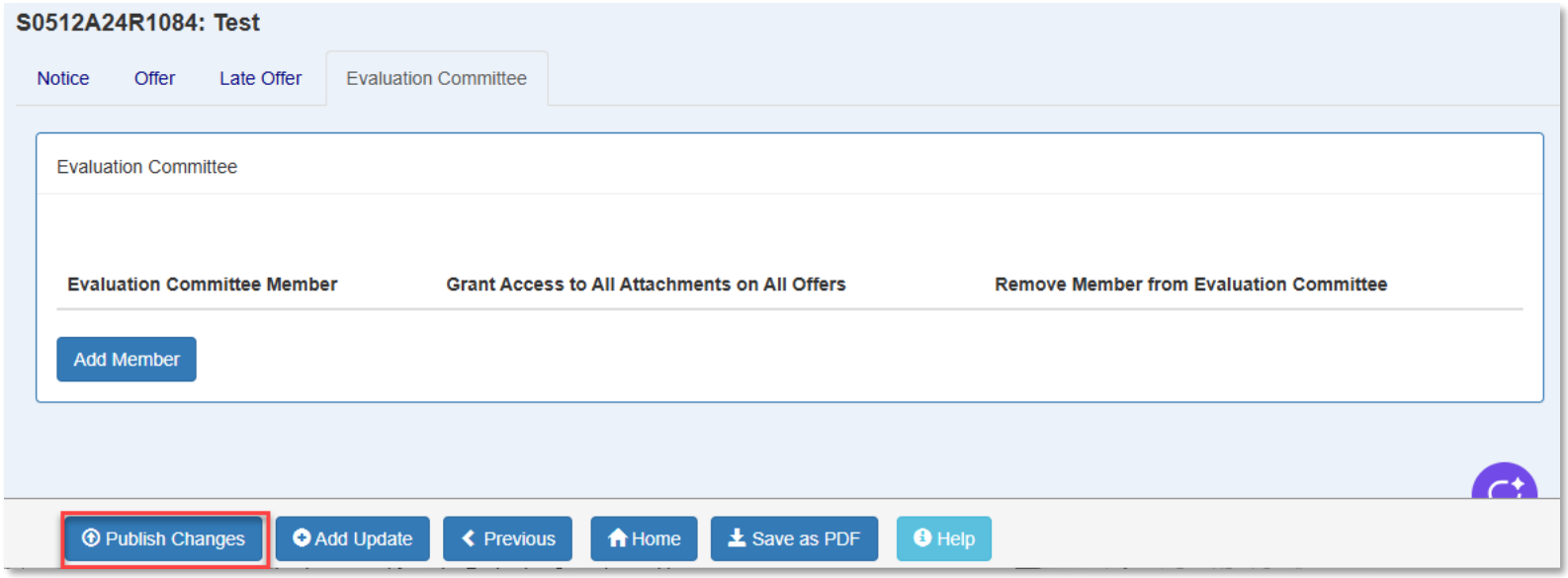
Click the **red x icon** to remove a Solicitation Manager from the Evaluation Committee.



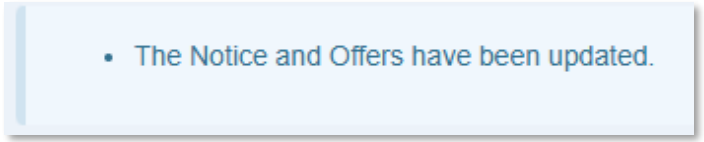
A pop-up displays the following message: “Removing this Evaluation Committee Member will remove them from all attachments on all offers. Do you wish to continue?” Click the **OK** button. The member is removed from the Evaluation Committee table.



Click **Publish Changes** to save all Evaluation Committee members removed from the notice.



Successfully removing Evaluation Committee Members displays a message at the top of the screen stating: “The Notice and Offers have been updated.”



Evaluation Committee Headers:

- Evaluation Committee Member
- Grant Access to All Attachments on All Offers
- Remove Member from Evaluation Committee

Evaluation Committee Buttons:

- Grant Access To all Attachments (***checkbox***)
- Remove Member from Evaluation Committee (***red x icon***)
- Add Member (***leads to Solicitation Manager Lookup pop-up***)
- Publish Changes (***to publish changes***)
- Add Update (***to navigate to Post Update screen***)
- Previous (***to navigate back to the previous screen***)
- Home (***to navigate back to the Solicitation module home screen***)

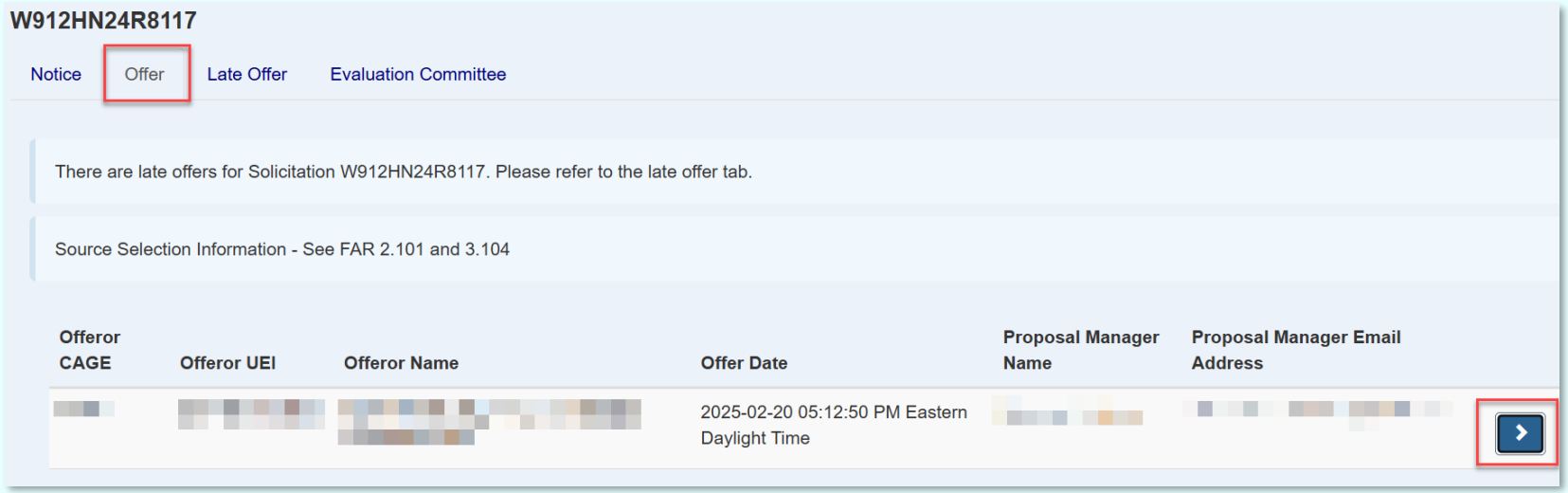
- Save as PDF (***to download opened notice to local machine***)
- Help (***displays help information***)

Pop-Up Buttons:

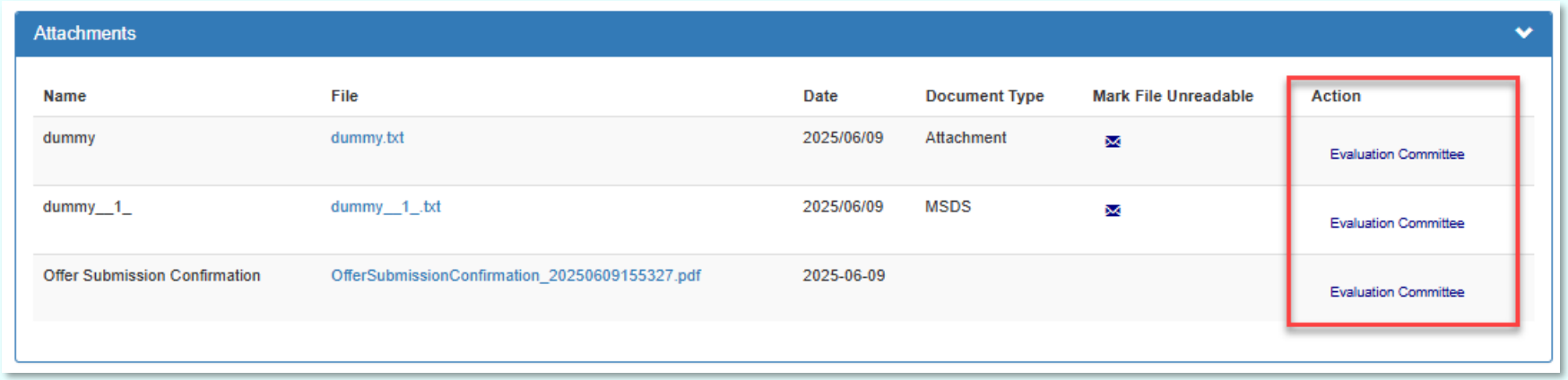
- OK (***confirms removal of Evaluation Committee Member***)
- Cancel (***closes pop-up***)

Assigning Members To An Offer Attachment

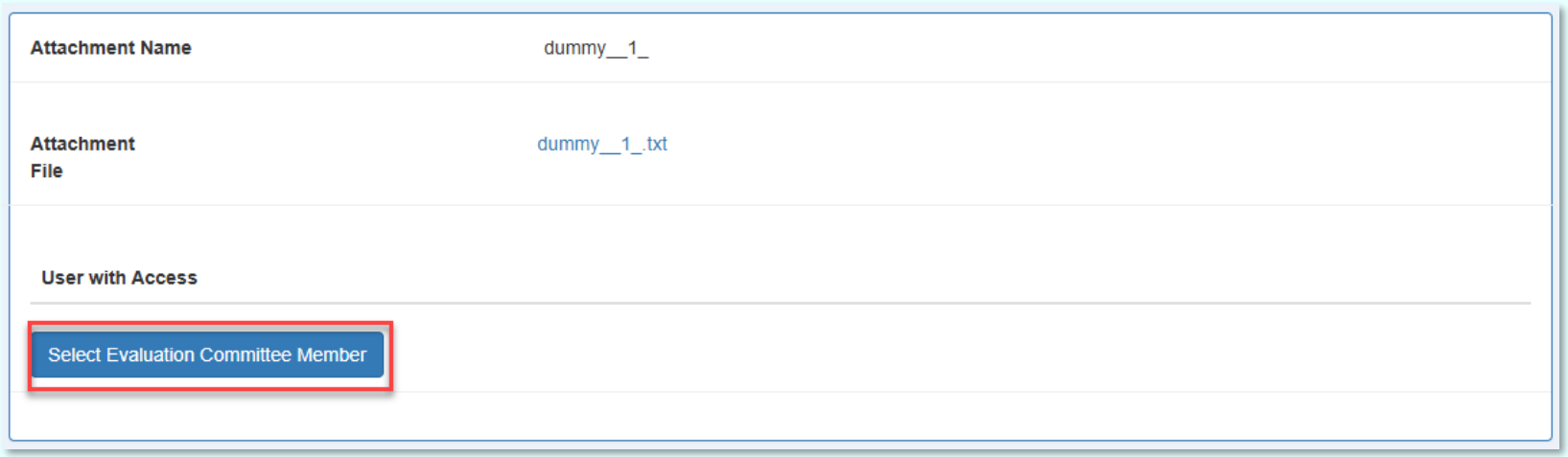
Click the **Offer** tab on the notice of interest. The user is led to the Offer screen. An information summary of the offers submitted against the notice are displayed in a table. Click the **arrow** button to expand offer details.



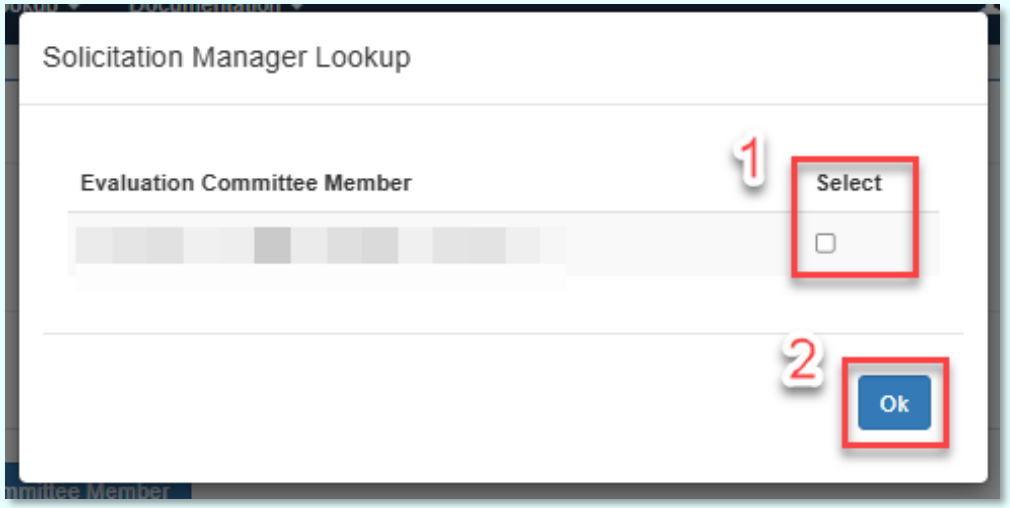
To assign Evaluation Committee Members to a specific offer attachment, click the **Evaluation Committee** hyperlink adjacent to the file in the Action Column in the Attachment section**.** The user is directed to a screen displaying the attachments information.



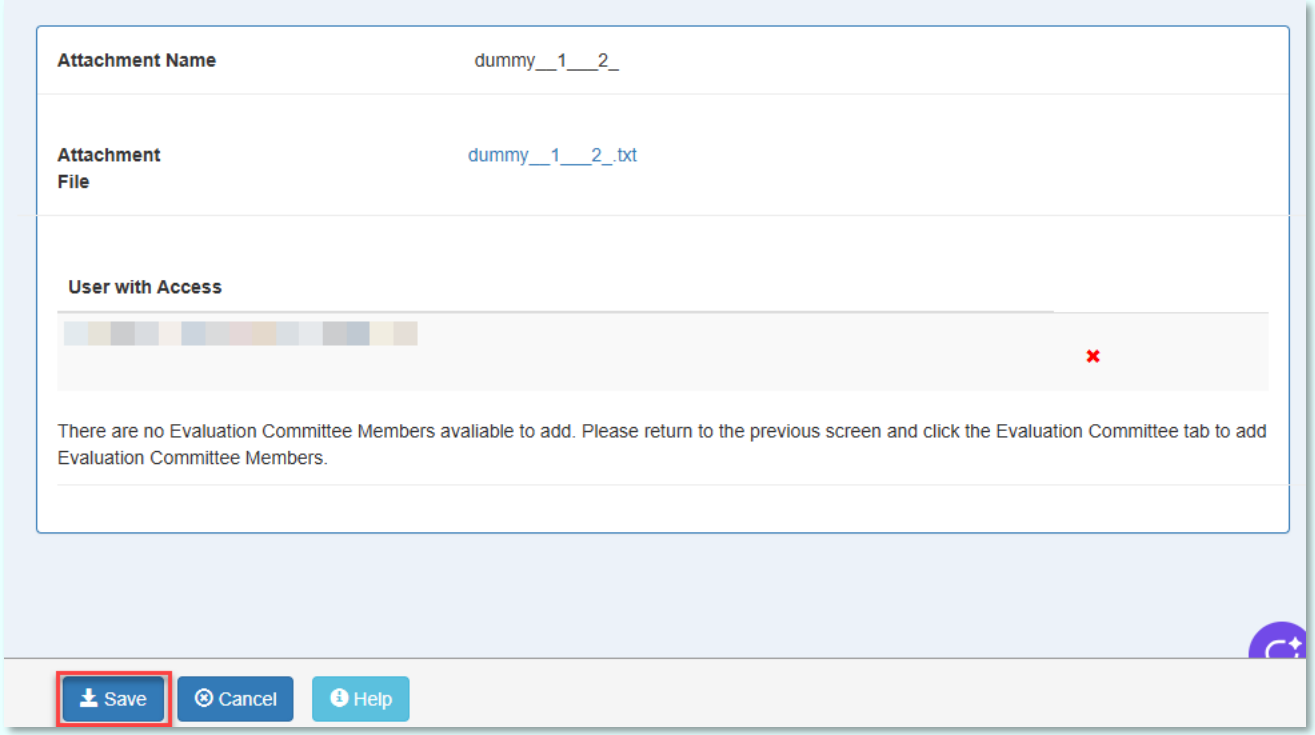
Click the **Select Evaluation Committee Member** button to assign a Solicitation Manager to the attachment.



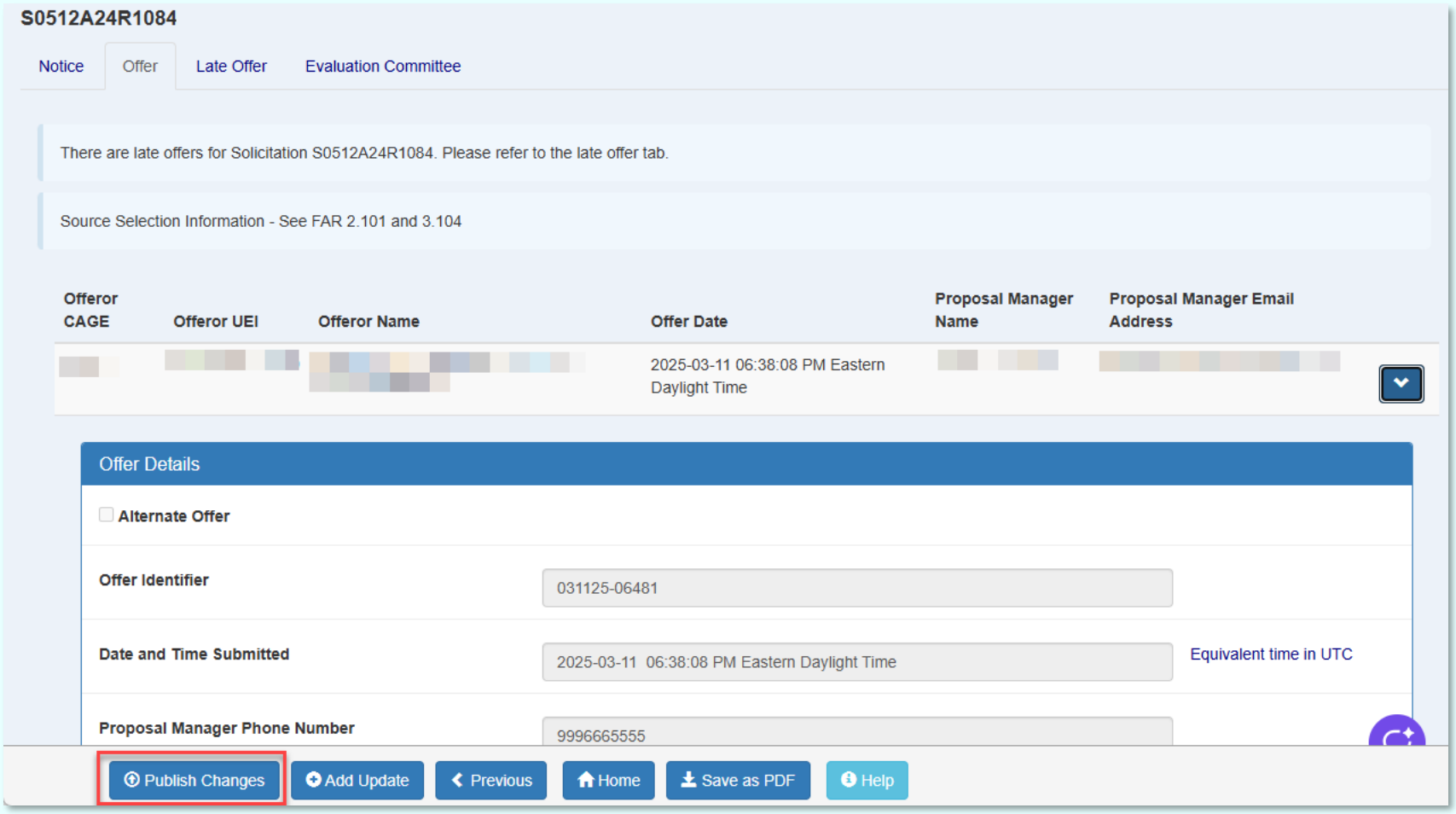
A pop-up displays. Select the **checkbox** adjacent to the Evaluation Committee Members you have previously assigned to the notice. Click **Ok**. The members are now added to the attachment and listed under the User with Access section.



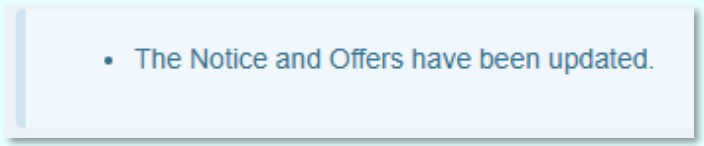
Click the **Save** button at the bottom of the screen to save Evaluation Committee Member selections on the specified attachment. The user is led to the Offer Details screen.



Click **Publish Changes** to save all Evaluation Committee members selected for offer attachments.



Successfully adding Evaluation Committee Members displays a message at the top of the screen stating: “The Notice and Offers have been updated.”



Offer Headers:

- Offeror CAGE
- Offeror UEI
- Offeror Name
- Offer Date (***format: YYYY-MM-DD HH:MM:SS Time Zone***)
- Proposal Manager Name
- Proposal Manager Email Address

Attachments Headers:

- Name
- File (***hyperlink***)
- Date (***format: YYYY-MM-DD***)
- Document Type (***options: Attachment / MSDS***)
- Mark File Unreadable
- Action
    - Evaluation Committee

Evaluation Committee Fields:

- Attachment Name (***auto-populated; not editable***)
- Attachment File (***hyperlink***)
- User With Access

Offer Details Button:

- Arrow (***expands Offer Details***)
- Publish Changes (***to publish changes***)
- Add Update (***to navigate to Post Update screen***)
- Previous (***to navigate back to the previous screen)***
- Home (***to navigate back to the Solicitation module home screen***)
- Save as PDF (***to download opened notice to local machine***)
- Help (***displays help information***)

Action Buttons:

- Evaluation Committee (***hyperlink; navigates to User with Access screen***)

Evaluation Committee Buttons:

- Select Evaluation Committee Member (***leads to Solicitation Manager Lookup Pop-up***)
- Red X icon (***removes Solicitation Manager from User With Access***)
- Save (***to confirm selections***)
- Cancel (***to disregard changes; leads back to offer details***)

- Help

Solicitation Manager Lookup Pop-Up Buttons:

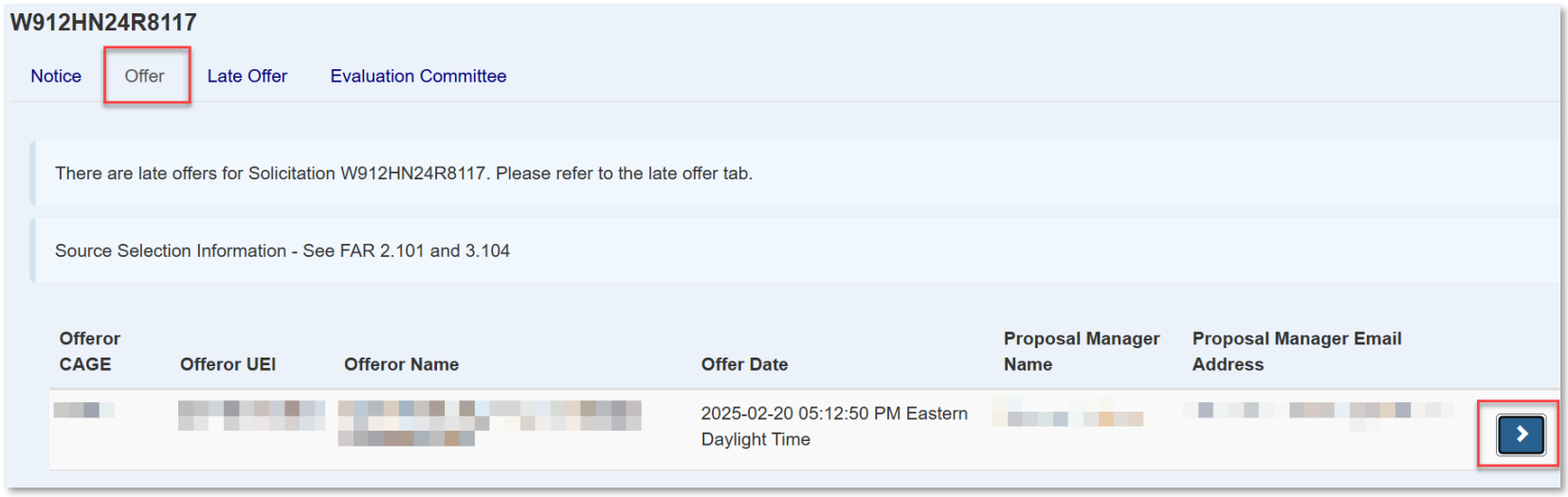
- Select (***to select Solicitation Manager for User With Access***)
- OK (***to confirm selection***)

NOTE: Access to the Evaluation Committee tab is available on the latest update of the notice.

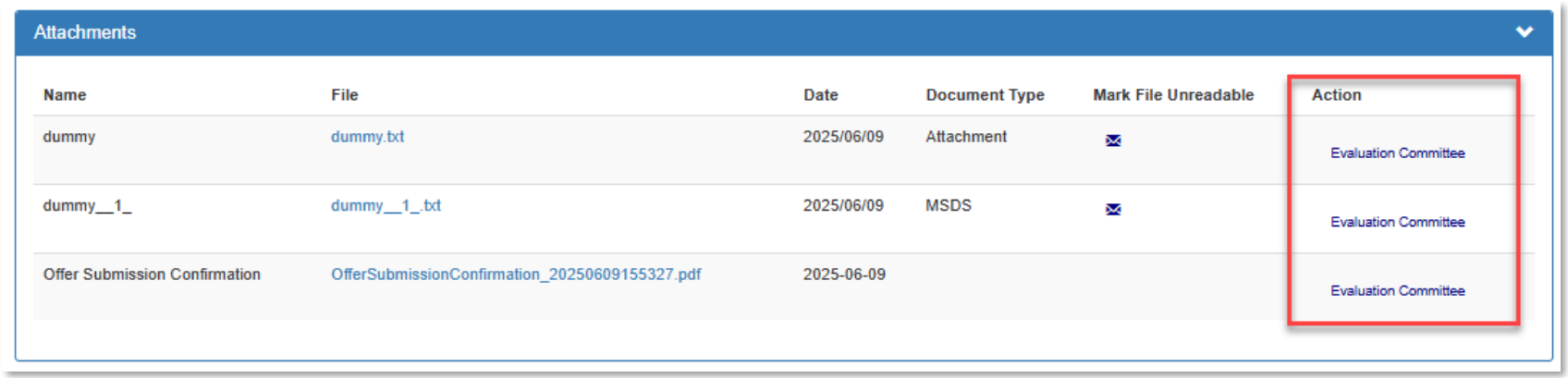
NOTE: For Evaluation committee members, the ZIP file only contains attachments to which they have been given access.

Removing Members From An Offer Attachment

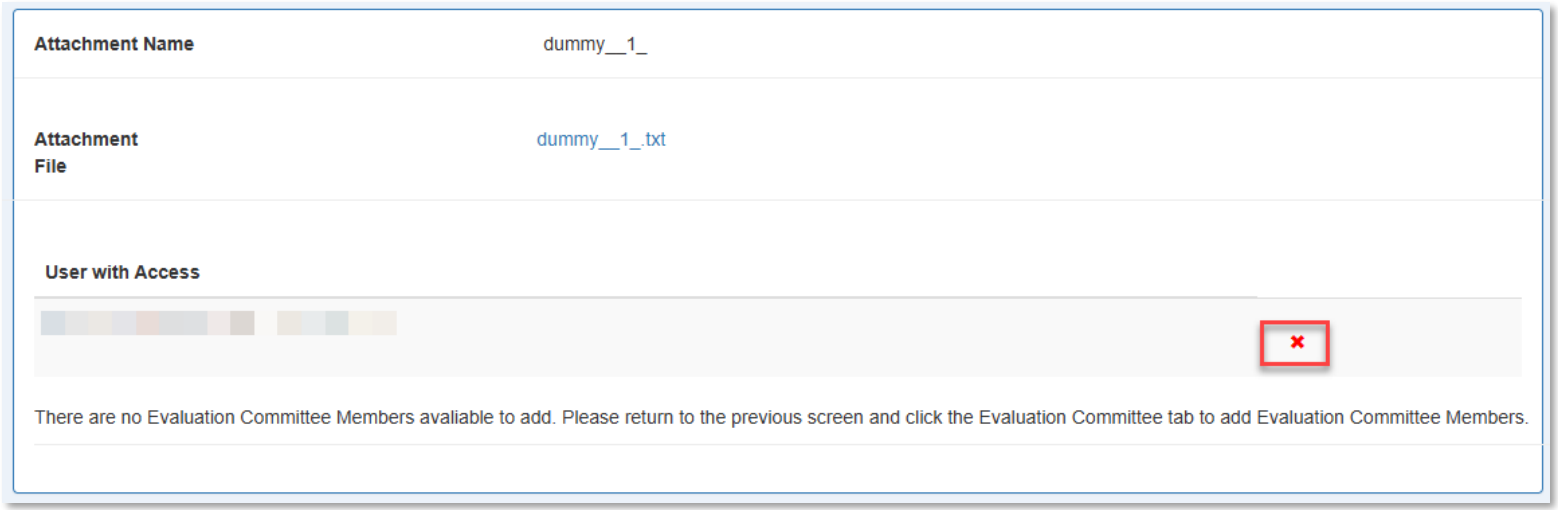
Click the **Offer** tab on the notice of interest. The user is led to the Offer screen. An information summary of the offers submitted against the notice are displayed in a table. Click the **arrow** button to expand offer details.



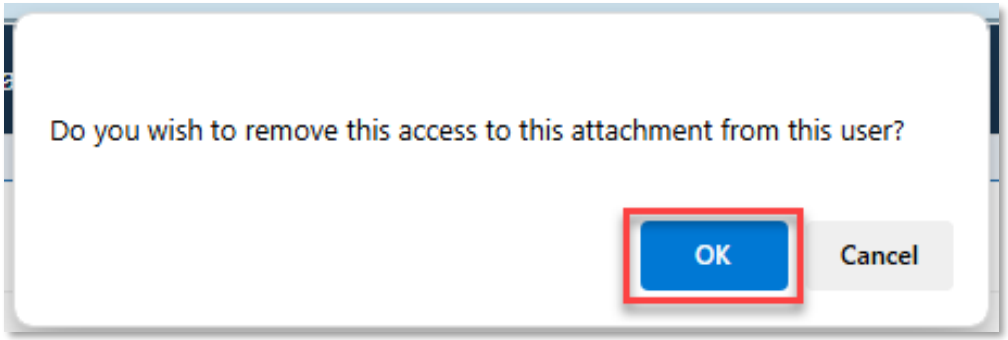
To remove an Evaluation Committee Members from a specific offer attachment, click the **Evaluation Committee** hyperlink adjacent to the file in the Action Column in the Attachments section**.** The user is directed to a screen displaying the attachments information.



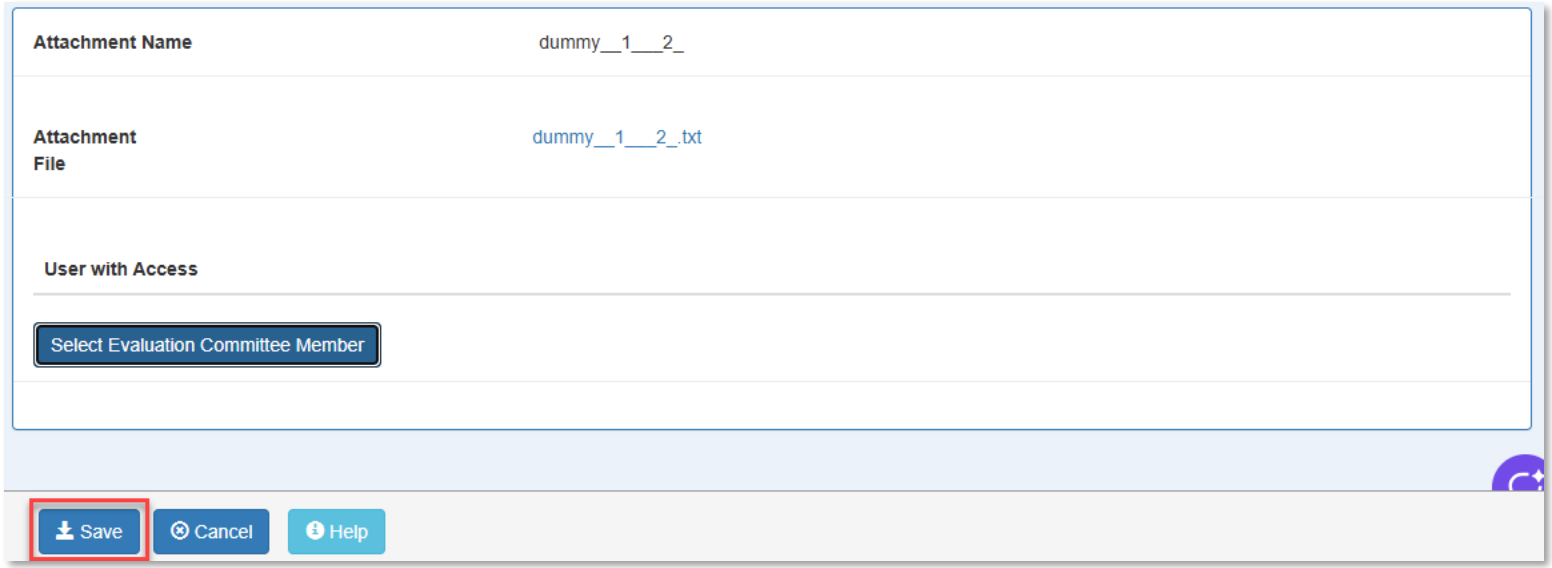
Click the **red (x) icon** adjacent to that member.



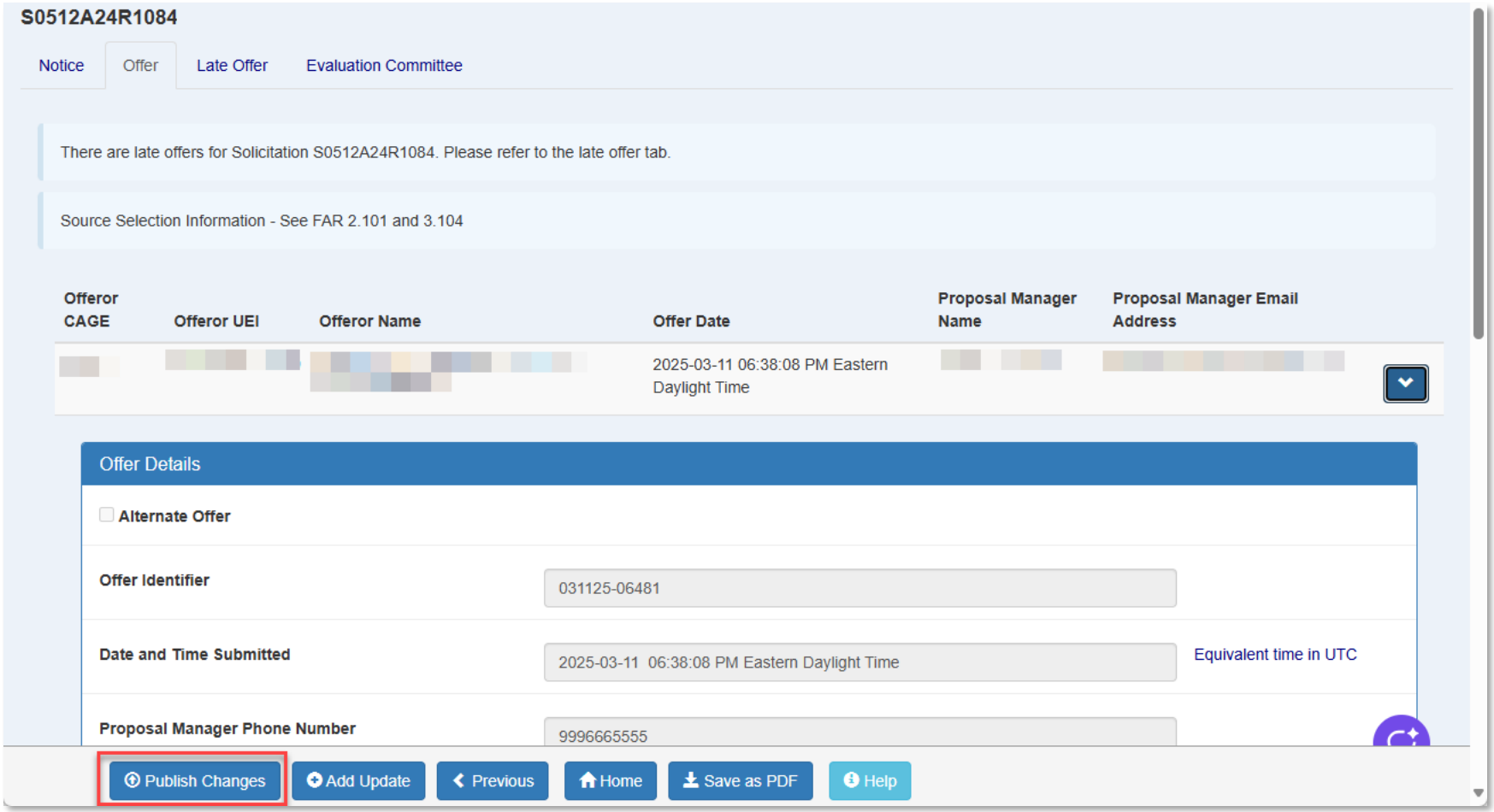
A pop-up displays asking “Do you wish to remove this access to this attachment from this user?” Click **Ok** to remove the Evaluation Committee Member. The member is no longer displayed in the User with Access table.



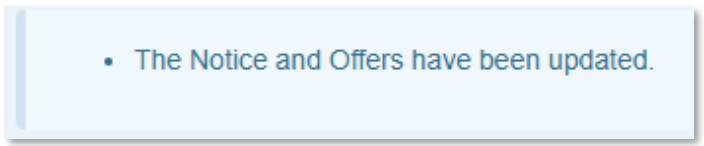
Click the **Save** button at the bottom of the screen to confirm Evaluation Committee Member removals. The user is led to the Offer Details screen.



Click **Publish Changes** to save all Evaluation Committee members removed from offer attachments.



Successfully removing Evaluation Committee Members displays a message at the top of the screen stating: “The Notice and Offers have been updated.”



Offer Headers:

- Offeror CAGE

- Offeror UEI
- Offeror Name
- Offer Date *(**format: YYYY-MM-DD HH:MM:SS Time Zone**)*
- Proposal Manager Name
- Proposal Manager Email Address

Attachments Headers:

- Name
- File (***hyperlink***)
- Date (***format: YYYY-MM-DD***)
- Document Type (***options: Attachment / MSDS***)
- Mark File Unreadable
- Action
    - Evaluation Committee

Evaluation Committee Fields:

- Attachment Name (***auto-populated; not editable***)
- Attachment File (***hyperlink***)
- User With Access

Offer Details Button:

- Arrow (***expands Offer Details***)
- Publish Changes (***to publish changes***)
- Add Update (***to navigate to Post Update screen***)
- Previous (***to navigate back to the previous screen)***
- Home (***to navigate back to the Solicitation module home screen***)
- Save as PDF (***to download opened notice to local machine***)
- Help (***displays help information***)

Action Buttons:

- Evaluation Committee (***hyperlink; navigates to User with Access screen***)

Evaluation Committee Buttons:

- Select Evaluation Committee Member (***leads to Solicitation Manager Lookup Pop-up***)
- Red X icon (***removes Solicitation Manager from User With Access***)
- Save (***to confirm selections***)
- Cancel (***to disregard changes; leads back to offer details***)
- Help

	Pop-Up Buttons: • OK (***to remove selected Solicitation Manager***) • Cancel (***to close pop-up***)