

**DecisionPoint**

**® User Manual**

**Version 4.0**

**May 2019**



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## Introduction to DecisionPoint

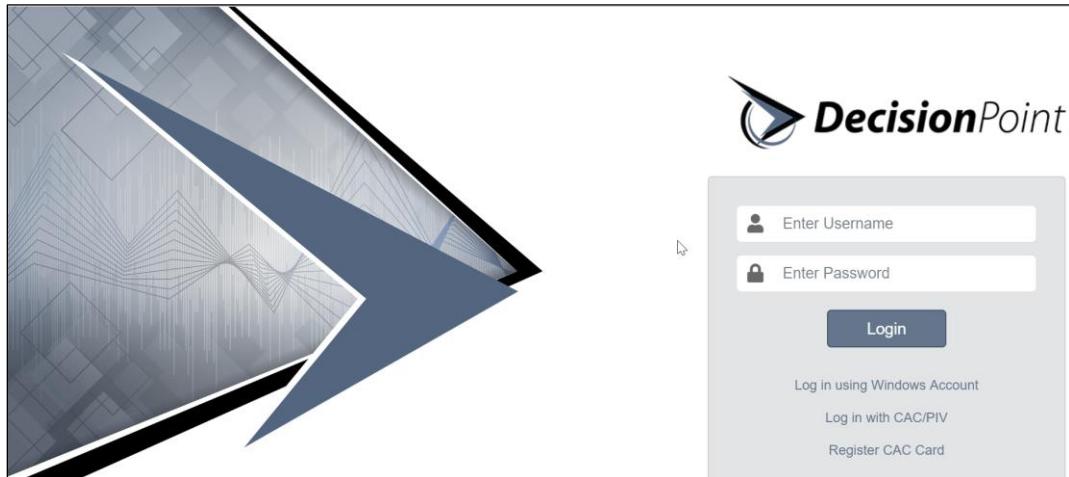
**Overview** DecisionPoint (DP) is a web based application, accessed through any modern standards-compliant web browser.

**Contents** This section contains the following topics:

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To access DecisionPoint:

- Open a web browser
- Enter the URL for the DecisionPoint server



*Note*

*See your LAN Administrator for the appropriate URL.*

## **Logging On – Windows Users**

In a local Windows environment, users will use their Active Directory credentials to access DecisionPoint. On the landing page, click the “Log in using Windows Account” link to enter the system.

## **Logging On – Standard Users**

In a remote environment, users will have DecisionPoint accounts created. On the landing page, enter the username and password you were provided into the appropriate fields. Click the “Login” button to enter the system.

## **Logging On – CAC/PIV Card Users**

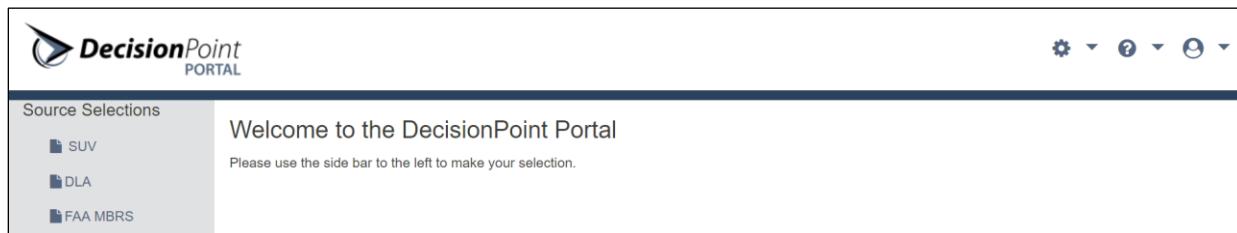
Some environments may have users enter the system using the Government-issued CAC/PIV cards. On the landing page, click the “Log in with CAC/PIV” link to enter the system.

## **Logging Off**

To end using the DecisionPoint system, select logoff from the user menu.

## The Source Selection Menu

The DP source selection menu appears, displaying a list of active source selections for the user. From this list, the user simply clicks on the assigned source selection to begin work.



## DecisionPoint Environment

**Main DecisionPoint Environment:** Once a source selection is chosen, the main DP environment is displayed. The main DP environment consists of the Menu Bar and the Main Workspace as shown below.

## Main Workspace



### Menu Bar:

The Menu Bar contains the major functions of the software. Each user's list of major functions may be different depending on the role they play in the source selection. The details of each function are provided in subsequent sections of this manual. The complete list of functions is:

- Home
- Evaluate
- Consensus
- Messages
- Reports
- Administration
- Help
- Profile

**Information Window:** The Information Window will provide context sensitive help or explanatory information for a selected option.

**Online DecisionPoint User Manual:** Online DecisionPoint manuals are available from the Help menu.

**Expand and Collapse Tree Views:** DecisionPoint utilizes hierarchical tree views to display things like the evaluation criteria, library folders/documents, and programmatic options. To expand the tree views, click on the  icon. To collapse a tree branch, click on the icon.

**Common Rich Text Items:** Some areas of DecisionPoint allow the user to Rich Text capabilities such as **bold**, *italicized*, or underlined text, creating a bulleted list, or changing the **text color**. If available, the Rich Text bar will appear above the text area.



The features work the same as common word processing programs such as Microsoft Word. Simply select the portion of text, then click on the desired action button in the Rich Text bar.

You may find the following Windows® shortcuts helpful while using DecisionPoint.

To Copy text, highlight the text and use CTRL+C, or right click and select CoTo Paste text, place the cursor at the insert point and use CTRL+V, or right click and select Paste.

## Evaluating

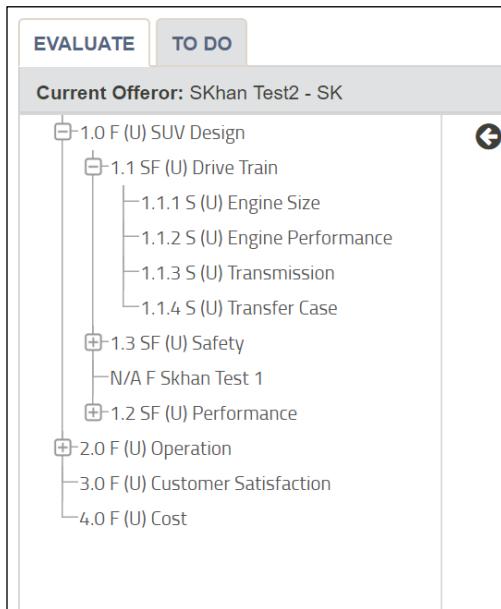
**Overview of the Evaluate Function:** The Evaluate function is where users will spend most of their time. This function displays the source selection criteria and allows users to enter comments (strengths, weaknesses, deficiencies, and exchanges) about the offeror proposals. Additionally, evaluation management can review the progress and quality of evaluator comments.

**Contents:** This section contains the following topics:

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## Evaluation Criteria

**Exploring Criteria:** Central to the evaluation of proposals is the evaluation criteria. When the Evaluate option is selected from the main menu, the Evaluate tab displays in the main workspace. A panel on the left side displays the user's criteria assignments.



**Assigned Criteria:** Users are assigned criteria to evaluate by the Source Selection Administrator.

- Criteria assigned to the user are displayed in black
- Those not assigned are displayed in gray

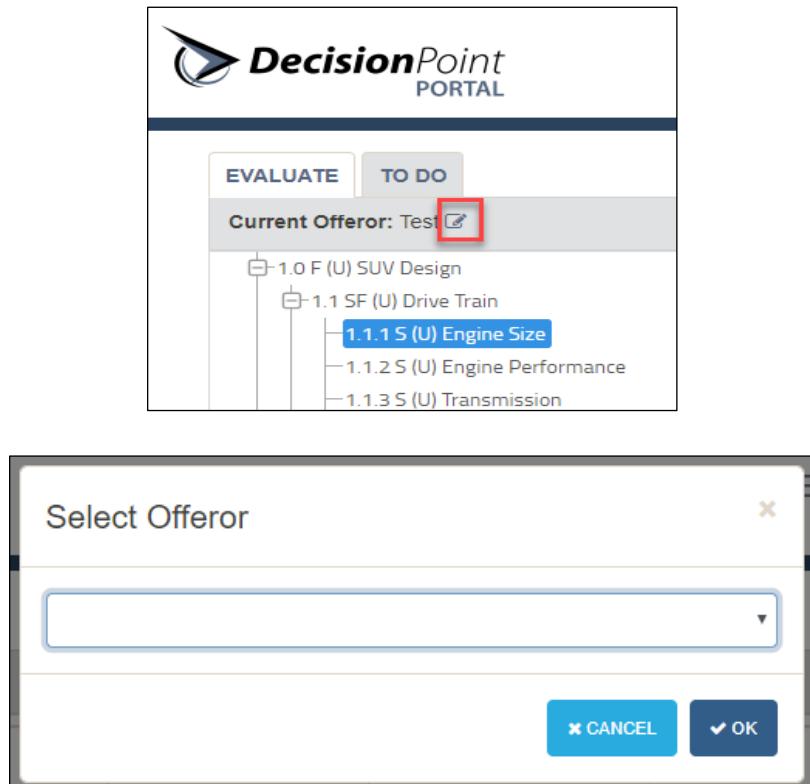
**To Do:** Users may also switch to the To Do tab in order to review progress toward completing assigned criteria.

Criterion	Tech Mgmt Ratings	Past Perf Ratings	Risk Assessments	Cost	Narrative	Past Performance
1.1 SF (U) Drive Train	○					
1.1.1 S (U) Engine Size					✓	
1.1.2 S (U) Engine Performance					✓	
1.1.3 S (U) Transmission					○	
1.1.4 S (U) Transfer Case					○	
1.3 SF (U) Safety	○					
1.3.1 S (U) Passenger Safety Systems					○	
1.3.2 S (U) Safety Ratings					○	
1.3.3 S (U) Braking Systems					○	

**Checking Progress:** As comments are made, the To Do tab will update the user's progress in two ways. First, the progress bar at the top of the tab will update:

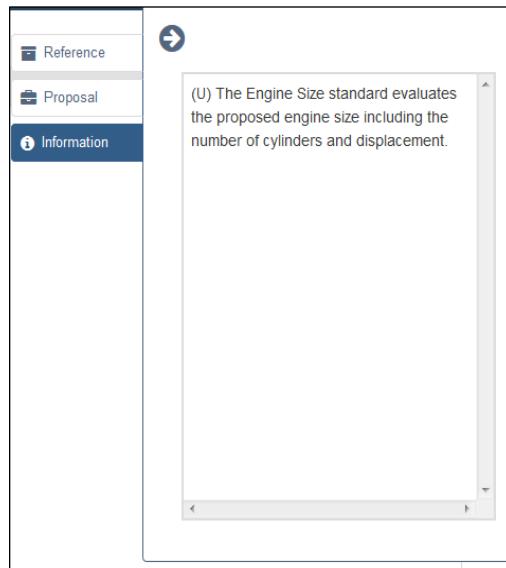
Second, the icon for each required comment will change from  to 

**Changing Offerors:** If the user has been granted the ability to move between offerors, a “Change Offeror” icon will appear at the top of the tab. If the user has been granted the ability to move freely through the offerors, clicking this will open a modal dialog box allowing them to choose their new offeror. If the user has been granted the ability to move sequentially, the system will move them to the next offeror.



*Note: If the user moves sequentially, they will be unable to return to the current offeror without assistance of a Source Selection Administrator. If the user moves sequentially, the system will ensure they have completed all required comments before allowing them to move.*

**Criteria Description:** Once a criterion is selected, the Criteria Description is displayed in the Help pane. The Source Selection Administrator loads this information from the Source Selection Plan or the Request for Proposal Section M.



## Comments

**The Comments Function:** The Comments function allows users to enter comments corresponding to source selection about the offeror proposals. Additionally, evaluation management can review the progress and quality of evaluator comments.

**Comment List:** Once the user selects a criterion to evaluate, the Main Workspace displays the Comment List. The list includes comments made by the user as well as comments made by users who are in a supporting role for that criterion.

**Example:** An evaluator would see a list of his or her comments and the comments made by advisors.

#	Type	Value	Author	Subject
17	Scale	++	Sharmina Khan	Test
18	Text		Sharmina Khan	Test 2
19	Text		Sharmina Khan	Test

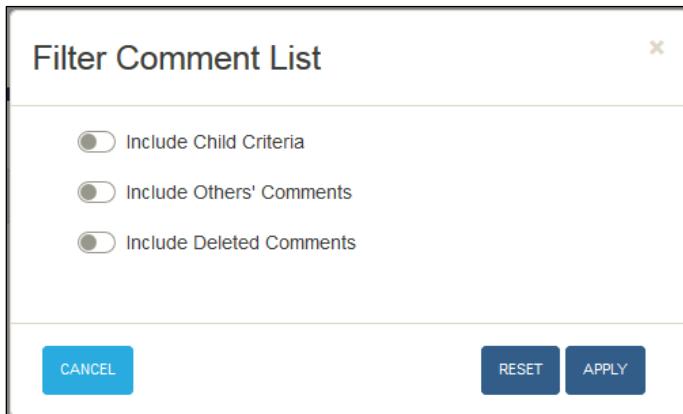
**Sorting the Comment List:** By default, comments are sorted in report order. This sorts them first by criteria, then comment type, then value, then number.

The list may be sorted by any column, in ascending order, by clicking on the column header.

The icons identify which column is being sorted and in which direction.

Ch	#	△	Type	Intensity	Author	Synopsis
<b>1.1 Drive Train</b>						
<input type="checkbox"/>	12		Tech/Mgmt Rating	8 - Teal: Good	Dunbar, Mark	Overall Offeror Demonstrates a Good Understanding of the Drive Train ...
<input type="checkbox"/>	13		Risk Rating	Low	Dunbar, Mark	Low Risk in Drive Train and Transmission Gear Ratios
<b>1.1.1 Engine Size</b>						
<input type="checkbox"/>	1		Strength	++	Anderson, Scott	Compact and Powerful Engine
<input type="checkbox"/>	2		Strength	+	Anderson, Scott	Compact Engine Leads To Easier Maintenance
<input type="checkbox"/>	7		Strength	++	Dunbar, Mark	Compact Engine Leads To Easier Maintenance
<input type="checkbox"/>	8		Exchange	Clarification Request	Dunbar, Mark	Ceramic Heads and Pistons
<b>1.1.2 Engine Performance</b>						
<input type="checkbox"/>	3		Strength	+	Anderson, Scott	Reduced Carbon Monoxide Fumes
<input type="checkbox"/>	4		Meets the Standard		Anderson, Scott	Engine Cooling System
<input type="checkbox"/>	9		Strength	+	Dunbar, Mark	Reduced NOx Device Emissions
<b>1.1.3 Transmission</b>						
<input type="checkbox"/>	5		Strength	+	Anderson, Scott	Six Speed Automatic Transmission
<input type="checkbox"/>	10		Weakness	-	Dunbar, Mark	Transmission Cycles Produce Wear and Increase Maintenance Down Time
<b>1.1.4 Transfer Case</b>						
<input type="checkbox"/>	6		Strength	+	Anderson, Scott	Innovative Transfer Distribution
<input type="checkbox"/>	11		Strength	++	Dunbar, Mark	Easy One Touch Four Wheel Drive Engagement

**Filtering the Comment List:** When first opened, only the current user's comments against the selected criterion are displayed. To expand this list, the user can choose to include additional comments by clicking the Filter Options button. That brings up the following modal dialog box:



**NOTE:** *The available options will depend on what rights have been granted to the user.*

#### Available Options

- **Include Child Criteria:** This shows comments from the current criterion, and all of its children criteria
- **Include Others' Comments:** This shows comments from other users. This is still subject to security restrictions – users aren't automatically authorized to view comments from all other users
- **Include Deleted Comments:** This shows comments that have been deleted.
- **Include Last Consensus' Comments:** This shows comments from the last consensus that was done for this criterion.

**Grouping/Listing Comments:** When first opened, the view will group comments by criteria. Users have the option of displaying comments as a flat list instead. There is a toggle switch in the header bar to switch between these two display modes.

**Opening an Existing Comment:** Click on the icon in the Comment List to open the Comment Form.

#	Type	Value	Author	Subject	
1.1.1 S (U) Engine Size					
17	Scale	++	Sharmina Khan	Test	
18	Text		Sharmina Khan	Test 2	
19	Text		Sharmina Khan	Test	

To return to the previous screen, click the  button.

**Adding New Comments:** There are two ways to add a new comment.

- From the Evaluate tab, click the “Add” button to add a comment to the current selected criterion.
- From the To Do tab, click the criterion name to add a comment to it.

**Comment Form:** When a new comment is added, a blank Comment Form is displayed. The elements of the Comment Form include:

**Items automatically populated by the system:**

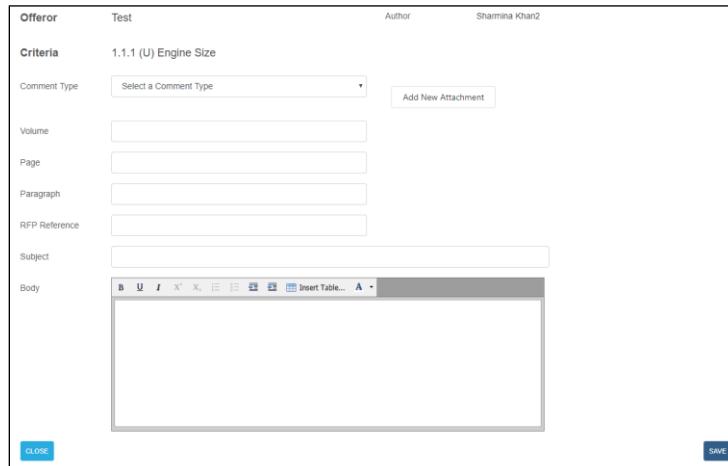
- Offeror
- Author
- Criteria

**Items that the user must input:**

- Comment Type \*
- Comment Intensity or Value (if available for the chosen Comment Type)
- Reference Information (Proposal Volume, Page, Paragraph, and RFP) \*\*
- Subject \*\*
- Comment Body \*

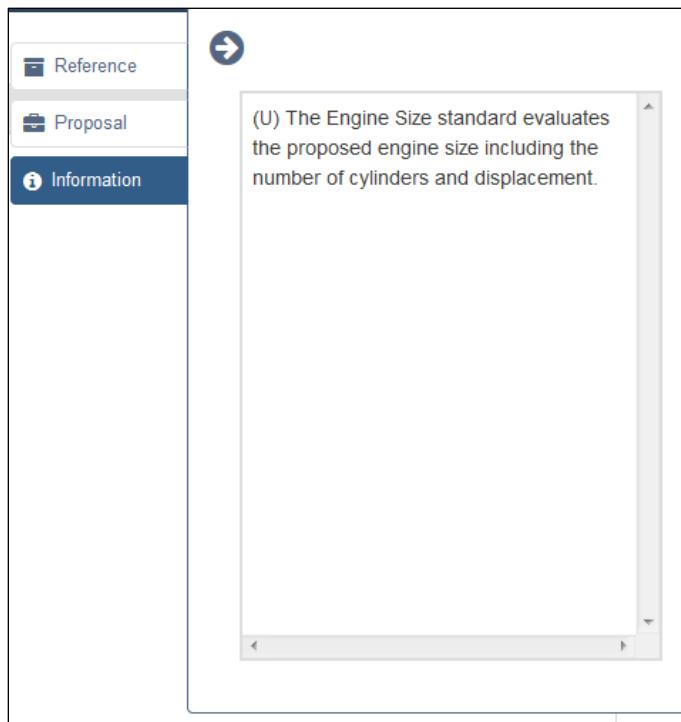
\* Input required.

\*\* Input may be required by the Source Selection Administrator.



The screenshot shows a modal dialog box for adding a comment. At the top, it displays the Offeror as 'Test' and the Author as 'Sharmina Khan2'. Below this, the Criteria is set to '1.1.1 (U) Engine Size'. The 'Comment Type' field is a dropdown menu labeled 'Select a Comment Type'. To the right of this dropdown is a 'Add New Attachment' button. Below the dropdown are fields for 'Volume', 'Page', 'Paragraph', and 'RFP Reference', each with an empty text input box. The 'Subject' field is also empty. At the bottom of the form is a rich text editor toolbar with various icons for bold, italic, underline, etc. At the very bottom of the dialog are two buttons: 'CLOSE' on the left and 'SAVE' on the right.

**Criteria Description:** The Criteria Description is displayed in the Help pane on the right side.



**Comment Types:** The comment types available for a criterion will vary, depending on the setup of the source selection and the source selection process being employed. A list of the available comment types and their definitions can be seen in the Help pane.

**Comment Intensities:** Once a comment type is selected, available intensities for that comment type can be selected. The definitions of the intensities can be seen in the Help pane.

**The Comment Body:** The comment body contains the meat of the evaluation. This is where the evaluators document the “what, why, and impact” of the specific item being commented on.

The comment body may also include supporting text from the:

- RFP
- Specifications
- Statement of work

Additionally, snippets of Offeror proposals can be copied and pasted into the comment body to add clarity or examples.

**Subject:** the subject should be treated as a summary of the comment as it would be used on a briefing slide to the Source Selection Authority.

**Note:** *Developing these bullets now will save time down the road and will ensure that the briefing accurately represents the assessments being made. Additionally, there is a 250-*

*character limit to the Subject.*

**File Attachment:** When a user wishes to include additional, non-text information in his or her comment, DP allows for adding file attachments.

Some examples include:

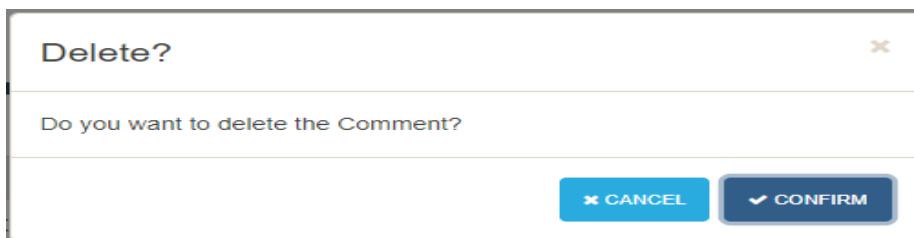
- Graphical items
- Presentation slides
- Spreadsheets
- Or any other file type

**The Attachment Manager:** Files are attached one at a time by following these steps:

Step	Action
1	Click the “Add New Attachment” button on the comment form.
2	Click Browse to find and select the file
3	Click Open in the file browser.
4	Repeat for additional files.
4	The file(s) will display on the form. When the comment is saved, it will be uploaded to the server.

**Save:** After adding a new comment, or editing an existing one, save the changes by clicking on the **Save** button.

**Delete:** A user can delete a comment from the DP system by opening it from the comment list and then clicking on the **DELETE** button. The system will then ask the user to confirm the action via a pop-up dialog box.



**Note:** *Users can only delete comments that they have made. If a user accidentally deletes a comment, the comment can be recovered by the Source Selection Administrator or another user that has been given the ability to recover deleted comments.*

**Close:** The **CLOSE** button returns the user to the previous screen.

**Move:** The **MOVE** button enables the user to move the comment from one criterion to

another in case it was mistakenly entered under the wrong criterion. To complete the move, the user selects the destination criterion and destination comment type (since comment types vary from criterion to criterion).

Offeror: Test

Criteria: 1.3.1 S (U) Passenger Safety Sys

Author: Sharmina Khan2

Last Modified: Friday, May 24, 2019

Comment: 20

Comment Type: Meets the Standard

Existing Attachments: No Data

Volume: 2

Page: 3

Paragraph: 4

RFP Reference: 6

Subject: Test

Body:

Test4

CLOSE SAVE

**Clone Comment:** If the user is able to view comments from others, such as advisors, they can be used to create new comments. To clone a comment, go through the following steps:

1. Open the comment that you wish to clone.
2. Click the “Clone” button at the top. A new comment form will open, with all of the fields filled in from the source comment.
3. Make any necessary edits to the comment.
4. Click the “Save” button to save this as your comment.

When a comment is cloned, the original comment remains untouched.

**Combine:** The **Combine** button enables the user to combine selected comments into a new comment for the selected criteria. This may be useful in creating a summary level rating or risk assessment by using lower level narratives to form the basis of the summary comment. Using the check boxes, select the source comments you want to combine, then click the Combine button.

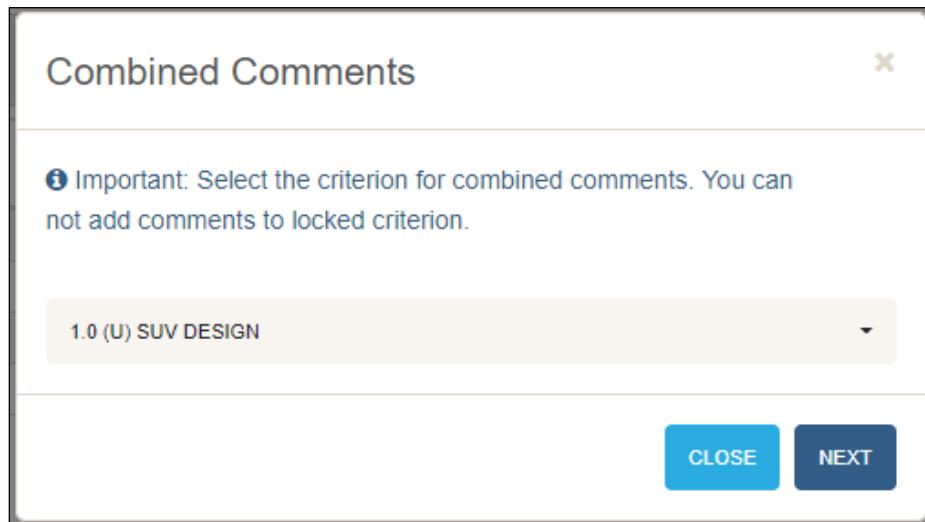
Add Combine

Grouped **ON** Filter Options

1.1.1 S (U) Engine Size

	#	Type	Value	Author	Subject	
<input checked="" type="checkbox"/>	17	Scale	++	Sharmina Khan	Test	<input checked="" type="checkbox"/>
<input type="checkbox"/>	18	Text		Sharmina Khan	Test 2	<input type="checkbox"/>
<input checked="" type="checkbox"/>	19	Text		Sharmina Khan	Test	<input checked="" type="checkbox"/>

Select a criterion for the combined comment on the next screen. Then click Continue.



Information from the source comments is brought into the new comment. Edit the comment as necessary, then Save it as usual.

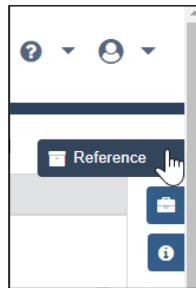
## Library Functions

**Library Overview:** The Library Function provides access to reference materials, such as the Source Selection Plan, Request for Proposal, and offeror proposals. Depending on user permissions setup by the Source Selection Administrator, users will see only their current offeror proposal or all offeror proposals.

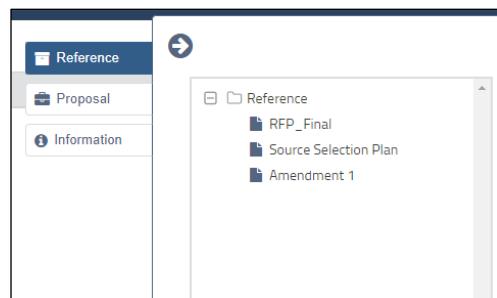
**Contents:** This section contains the following topics:

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Accessing the Library	17
Reference Documents	17
Proposals	18
User Permissions	18

**Accessing the Library:** The Library can be viewed by expanding the Help pane on the right side. There are separate tabs for the Reference Library and Proposal Library.



**Reference Documents:** The file structure displayed in the Library can be expanded or collapsed by clicking the or icons, respectively. To open a specific reference document, simply click on the file name. The selected file will open in a new browser window, allowing the user to alternate between the DP evaluation software and the reference document.



**Proposals:** Proposals are accessed the same way as reference documents. The file structure can be expanded or collapsed by clicking the  or  icons, respectively. Depending on established user permissions, users will have access to the current offeror or to all offerors. Clicking on a specific file name opens the proposal file in a new browser window, allowing the user to alternate between the DP evaluation software and the proposal document.

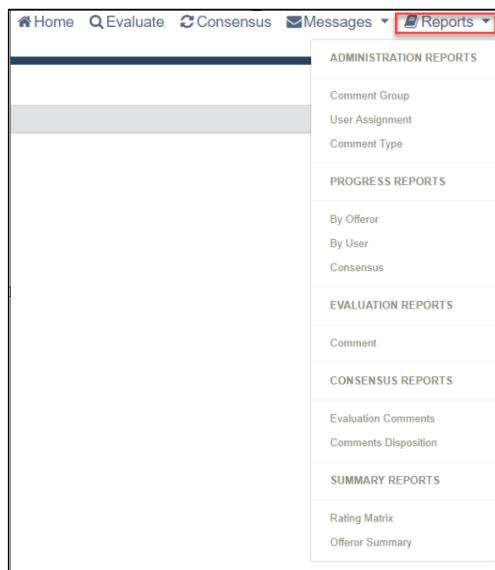
**User Permissions:** Restrictions may be placed on which users can access a specific proposal document. Restricted files will not appear to the user.

## Reporting

**Reports Function:** Users can generate reports in DecisionPoint by selecting the desired report from the Report menu.

DecisionPoint offers several management reports to get preliminary information for external review, track the progress of the evaluation, and help produce final documentation and decision making.

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Progress by Offeror/User	21
Progress by User/Offeror	22
Rating Matrix	23
Offeror Summary Report	24



## Comment Reporting

**Comment Reports:** Selecting the Comment Report option allows the user to select the criteria, comment types, and users to include in the report.

### Comments Report

A report that contains comments available to a single user.

Phase:  File Format:  Word  PDF  Excel

Offeror:  Use Color:  Black & White  Color

Criteria:  Select All  1.0 (U) SUV Design  1.1 (U) Drive Train  1.1.1 (U) Engine Size

Comment Format Options:  Include Bold  Include Italic  Include Underline  Include Color

Comment Types:  Select All  Evaluated Cost  Realism  Meets the Standard

User:  Select All  Sharmina Khan2  Sierra Dimmer  Sharmina Khan

**GENERATE REPORT**

Once the selections have been made, click the button to generate and download the report. The system will produce the reports containing all comments available to the user that meet the selection. If there are no comments, the system will display a message

**Note: Comment reports are not saved by the system.**

**SOURCE SELECTION INFORMATION - SEE FAR 2.101  
and 3.104  
FOR OFFICIAL USE ONLY**

Comment Report

Source Selection : SUV Friday, May 24, 2019

Generated By : Sharmina Khan2

Offeror : Training

Criterion : (U) SUV Design

**(U) SUV Design**  
(U) The Design factor covers elements of the manufacturer's design related to the operational performance, and safety features of the Sport Utility Vehicle.

Author : Comment #:

Subject :

Comment :

Source Selection : SUV

Generated By : Sharmina Khan2

Offeror : Daniel Test

Criterion : (U) SUV Design

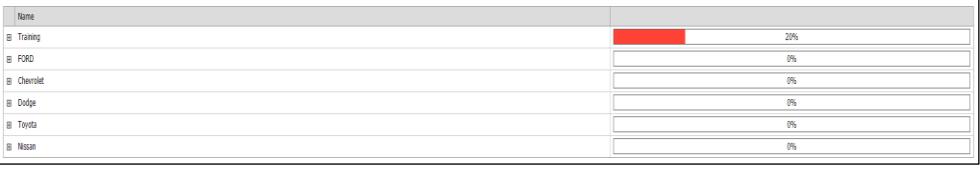
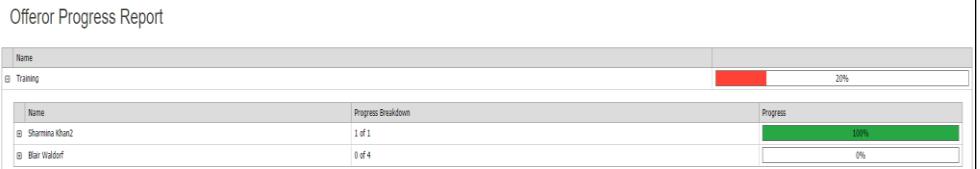
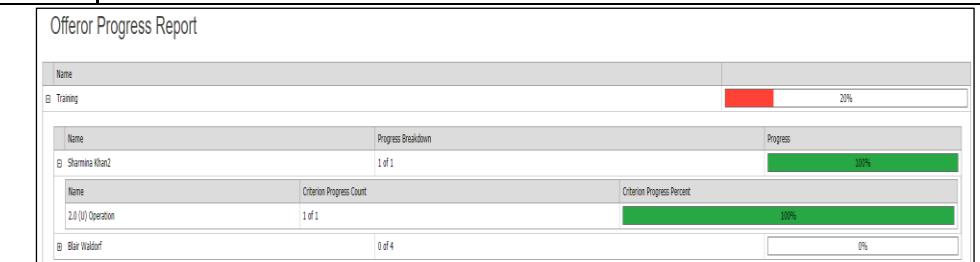
**(U) SUV Design**  
(U) The Design factor covers elements of the manufacturer's design related to the operational performance, and safety features of the Sport Utility Vehicle.

## Management Reports

**Progress by Offeror:** The Progress by Offeror report provides source selection management the ability to see at a glance how users are progressing through their required comment activities.

The status bar color changes based on completion: 0-24% - Red, 25-89% - Yellow, 90-100% - Green.

**Note:** *The progress indicators only take into account that a required comment has been completed and do not indicate that the user is finished making comments on a particular criterion.*

Step	Action
1	Select By Offeror from the Progress Report section of the Report menu.
2	
3	
	

**Progress by User:** The Progress by User report provides source selection management the ability to see at a glance how users are progressing through their required comment activities.

The status bar color changes based on completion: 0-24% - Red, 25-89% - Yellow, 90-100% - Green.

**Note:** *The progress indicators only take into account that a required comment has been completed and do not indicate that the user is finished making comments on a particular criterion.*

Step	Action																								
1	Access the Reports function from the main menu.																								
2	Select Progress by User/Offeror from the sub menu. The progress for all users and offerors will be displayed.																								
3	<p>User Progress Report</p>  <table border="1"> <thead> <tr> <th>Name</th> <th>Progress Breakdown</th> </tr> </thead> <tbody> <tr> <td>Shamina Khan</td> <td>1 of 1</td> </tr> <tr> <td>Sierra Dimmer</td> <td>0 of 0</td> </tr> <tr> <td>Sandra Hinman</td> <td>0 of 0</td> </tr> <tr> <td>Anthony Barkley</td> <td>0 of 0</td> </tr> <tr> <td>Bar Waldorf</td> <td>0 of 4</td> </tr> <tr> <td>Clare Tark</td> <td>0 of 0</td> </tr> <tr> <td>Dan Hilzay</td> <td>0 of 0</td> </tr> </tbody> </table>	Name	Progress Breakdown	Shamina Khan	1 of 1	Sierra Dimmer	0 of 0	Sandra Hinman	0 of 0	Anthony Barkley	0 of 0	Bar Waldorf	0 of 4	Clare Tark	0 of 0	Dan Hilzay	0 of 0								
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4	<p>User Progress Report</p>  <table border="1"> <thead> <tr> <th>Name</th> <th>Progress Breakdown</th> <th>Progress</th> </tr> </thead> <tbody> <tr> <td>Shamina Khan</td> <td>1 of 1</td> <td>100%</td> </tr> <tr> <td>Training</td> <td>1 of 1</td> <td>20%</td> </tr> <tr> <td>FORD</td> <td>0 of 1</td> <td>0%</td> </tr> <tr> <td>Dodge</td> <td>0 of 1</td> <td>0%</td> </tr> <tr> <td>Chevrolet</td> <td>0 of 1</td> <td>0%</td> </tr> <tr> <td>Toyota</td> <td>0 of 1</td> <td>0%</td> </tr> <tr> <td>Nissan</td> <td>0 of 1</td> <td>0%</td> </tr> </tbody> </table>	Name	Progress Breakdown	Progress	Shamina Khan	1 of 1	100%	Training	1 of 1	20%	FORD	0 of 1	0%	Dodge	0 of 1	0%	Chevrolet	0 of 1	0%	Toyota	0 of 1	0%	Nissan	0 of 1	0%
Name	Progress Breakdown	Progress																							
Shamina Khan	1 of 1	100%																							
Training	1 of 1	20%																							
FORD	0 of 1	0%																							
Dodge	0 of 1	0%																							
Chevrolet	0 of 1	0%																							
Toyota	0 of 1	0%																							
Nissan	0 of 1	0%																							
5	Return to the list of Offerors or list of Users by clicking on the User's name or "Users," respectively.																								

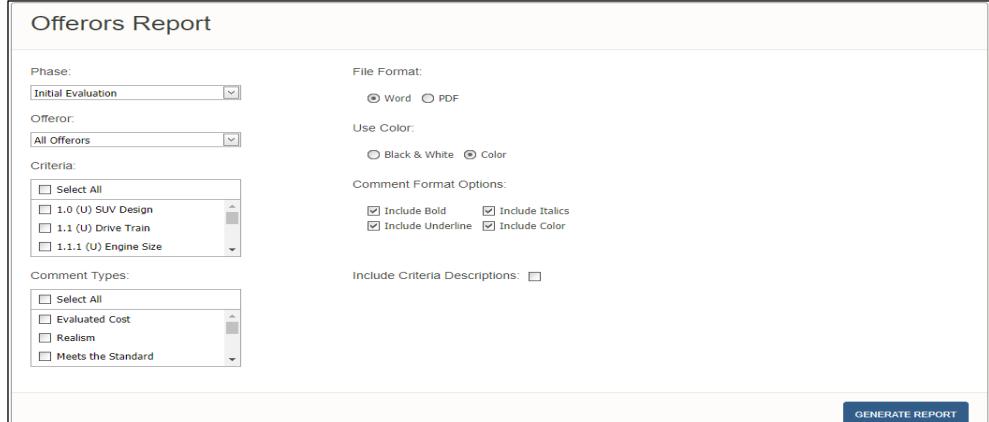
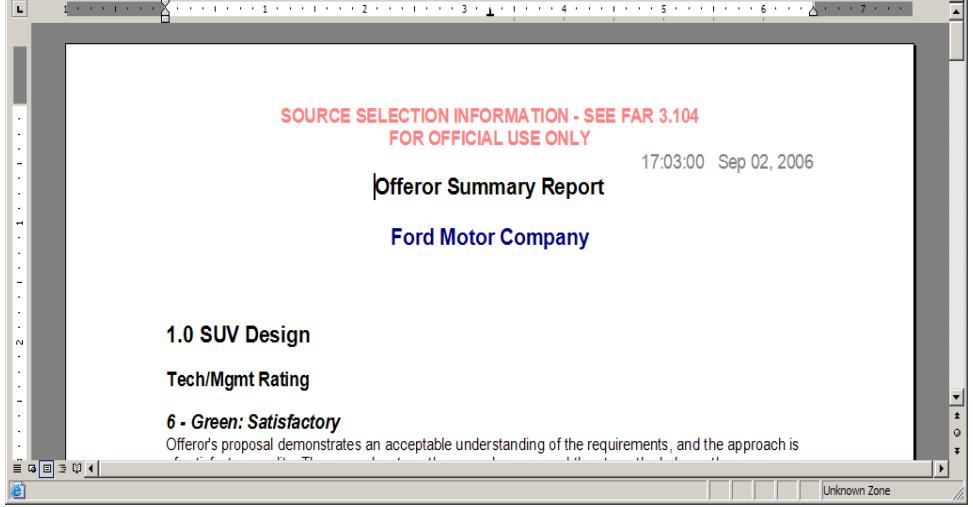
**Rating Matrix:** The Rating Matrix report allows source selection management to see a graphical representation of how each offeror was rated. The specific criteria and comment types used to create the rating matrix are established by the Source Selection Administrator, and the information displayed in the matrix is from the consensus reports.

**Note:** *If there is more than one comment of the type to be included in the rating matrix for a given criterion, DecisionPoint will only display the intensity for the first comment, e.g., if more than one technical rating is included in consensus for a subfactor, only one technical rating will be displayed for that subfactor.*

Step	Action												
1	Select Rating Matrix from the Summary Reports section of the Reports menu..												
	<p><b>Rating Matrix Report</b></p> <p>A report that combines multiple consensus reports into a single document</p> <p>Phase: <input style="border: 1px solid #ccc; padding: 2px 10px; width: 150px; height: 20px;" type="button" value="Initial Evaluation"/> <input style="background-color: #005a7b; color: white; border: 1px solid #005a7b; padding: 2px 10px; width: 150px; height: 20px;" type="button" value="DOWNLOAD REPORT"/></p>												
2	Select the desired phase.												
3	To download the report as an Excel file, click the Download Report button.												
	<p><b>Rating Matrix Report</b></p> <p>A report that combines multiple consensus reports into a single document</p> <p>Phase: <input style="border: 1px solid #ccc; padding: 2px 10px; width: 150px; height: 20px;" type="button" value="Initial Evaluation"/> <input style="background-color: #005a7b; color: white; border: 1px solid #005a7b; padding: 2px 10px; width: 150px; height: 20px;" type="button" value="DOWNLOAD REPORT"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 10%;">Training</td><td style="width: 90%;">Skhan Test 1</td></tr> <tr><td>FORD</td><td>Tech/Mgmt Rating</td></tr> <tr><td>Dodge</td><td></td></tr> <tr><td>Chevrolet</td><td></td></tr> <tr><td>Toyota</td><td></td></tr> <tr><td>Nissan</td><td></td></tr> </table>	Training	Skhan Test 1	FORD	Tech/Mgmt Rating	Dodge		Chevrolet		Toyota		Nissan	
Training	Skhan Test 1												
FORD	Tech/Mgmt Rating												
Dodge													
Chevrolet													
Toyota													
Nissan													
<b>Note</b>	<i>If the consensus reports are not complete, blanks will appear in the on-screen Rating Matrix and the word “incomplete” will appear in the Excel Rating Matrix.</i>												

**Offeror Summary Report:** The Offeror Summary Report allows source selection management to create one report containing all consensus reports for an offeror. This consolidated report is often very useful in performing trade-off analysis.

**Note:** This report is generated from the comments included during consensus. Therefore, this report is only complete once all consensus evaluation reports are completed.

Step	Action
1	Select Offeror Summary from the Summary Reports section of the Reports Menu.
	
2	Select the desired offeror(s), phase, content, formatting, and output file type (PDF or Word).
3	Click the Generate Report button to download the Offeror
	

## Coming to Consensus

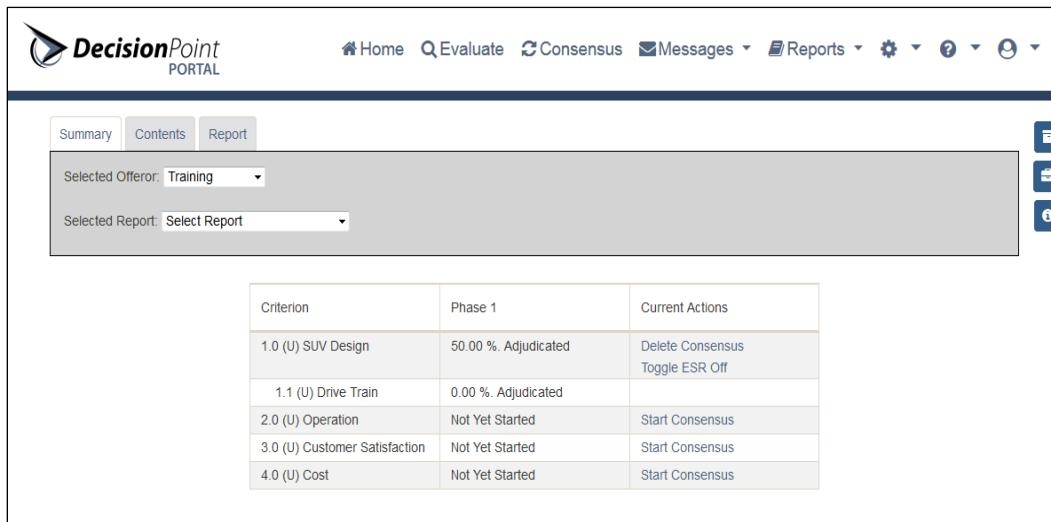
**Overview:** Consensus usually involves collaboration, rather than compromise. Instead of one opinion being adopted by a plurality, stakeholders are brought together (often with facilitation) until a convergent decision is developed. If this is done in a purely mechanical way it can result in simple trading—we'll sacrifice this if you'll sacrifice that. Genuine consensus typically requires more focus on developing the relationships among stakeholders, so that they work together to achieve agreements based on willing consent. Evaluation managers use Consensus to review user comments, modify them if necessary, and determine if they should be included in the Consensus Evaluation Report (CER). So that the process of deliberation as well as the final determination can be captured, Consensus adds a Yes/No inclusion option and disposition area to the basic comment forms. Once the CER has been created, it can be released to the evaluation team for approval. Consensus always occurs at the Factor level. However, the administrator can designate subfactors at which a sub-consensus will be performed.

**Contents:** This section contains the following topics:

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## Creating New Consensus

**Accessing Consensus Function:** Select “Consensus” from the menu to access the Summary tab of the Consensus area.



The screenshot shows the DecisionPoint PORTAL interface. At the top, there is a navigation bar with links for Home, Evaluate, Consensus, Messages, Reports, and other system settings. Below the navigation bar, there are three tabs: Summary (which is selected), Contents, and Report. Under the Summary tab, there are two dropdown menus: "Selected Offeror: Training" and "Selected Report: Select Report". To the right of these dropdowns are three blue icons: a folder, a document, and a person. The main content area displays a table with five rows of data. The table has three columns: Criterion, Phase 1, and Current Actions.

Criterion	Phase 1	Current Actions
1.0 (U) SUV Design	50.00 % Adjudicated	Delete Consensus Toggle ESR Off
1.1 (U) Drive Train	0.00 % Adjudicated	
2.0 (U) Operation	Not Yet Started	Start Consensus
3.0 (U) Customer Satisfaction	Not Yet Started	Start Consensus
4.0 (U) Cost	Not Yet Started	Start Consensus

**Summary Tab:** The summary tab displays the status of all consensus reports for the selected offeror. It also contains the actions to start and finish consensus. When the consensus report has been finalized, it will be available for download here.

**Start Consensus:** To begin, the consensus facilitator will select an offer and click the appropriate Start Consensus link.

## Evaluation Comments Report

**Evaluation Comments Report:** Achieving consensus requires serious treatment of every group member's considered opinion. In order to view these opinions, it may be helpful to generate an Evaluator Summary Report, which will contain the inputs to this consensus. This option is available to any user who has access to the Consensus function and is assigned to a criterion within the consensus.

*Note: The Evaluation Comments Report will not be available to users until turned on by the consensus facilitator. This is done for each consensus session.*

Step	Action
1	Select Evaluation Comments from the Reports menu.
2	Select the desired report to run (Phase, Offeror, Consensus)
3	Select the desired output options, such as file format and sorting.
4	Click the Generate Report button to create the evaluation comments report and start the download.
	<p>SOURCE SELECTION INFORMATION - SEE FAR 3.104 FOR OFFICIAL USE ONLY</p> <p>11:47:00 Jun 17, 2007</p> <p>Evaluator Summary Report</p> <p>Generated By: Laura Willets Offeror: Ford Motor Co. Consensus: 1.0 SUV Design</p> <hr/> <p>Ford Motor Co.</p>

## Viewing Consensus Comments

**Content Tab:** Selecting the Content tb allows the consensus facilitator to access a list of comments.

**The Consensus List View:** The consensus list view, displayed in the Main Workspace, shows a comment list as well as several buttons for operations to perform on the CER. The evaluation team must decide whether to include (“I”) or exclude (“E”) each comment in the CER. While reviewing the comments, the evaluation team can also add new comments or edit, combine, or move existing comments.

The Group toggle in the header can be used to change the way comments are displayed. When first opened, they will be grouped by criteria. The toggle allows you to change to a flat list.

**Consensus Statistics:** Consensus statistics are available in the header bar. This display shows the total number of comments, the number marked Included, the number marked Excluded, and the number not yet adjudicated. The numbers represent those in the filtered subset, and the numbers in parenthesis represent the consensus report in total.

**Unmarking/Unlocking Comments:** When working within the consensus comment list, the Include/Exclude/Not Adjudicated radio buttons can be marked. Once a comment is edited in Consensus or its Include or Not Include determination is changed, the original comment in the Evaluate area is locked so that the user cannot edit it further. This prevents the user from changing the input to consensus after action has been taken on the comment. The comment can be unlocked by opening it and clicking the “Reset” button.

 **Note:** *Unlocking a comment will reset the comment in the Consensus area back to the original version from Evaluate, and any previous edits will be lost.*

**Adding New Comments:** If the evaluation team determines that a new comment should be made, use the following procedure.

Step	Action
1	Click the Add New button to start a new comment.
2	Select the criteria to which the comment applies.
3	Click the OK button.
4	Enter the new comment in the form provided.
5	Click the Save button to save the comment.

**Editing Comments:** To edit a single, existing comment, follow the steps below:

Step	Action
1	Select the comment from the list.
2	A comment form will open in the workspace, allowing the user to edit the comment.
3	Mark the comment “I” to include in, or “E” to exclude from, the report.
4	Optionally enter information in the Disposition area describing the discussion concerning the comment resulting in the changes being made.
3	When the comment has been updated, click the Save button. Close the comment window by clicking on the Close button to return to the consensus.

**Combining Comments:** Follow these steps when the evaluation team determines that two or more comments should be combined.

Step	Action
1	Check the checkboxes next to the comments to be combined.
2	Click the Combine button.
3	Select the criteria for the new comment
4	Click on the Save button to open the new comment

<a href="#">Summary</a> <a href="#">Contents</a> <a href="#">Report</a>									
Selected Offeror: Training	Included 0 (2)								
Selected Report: 1.0 (U) SUV Design	Not Included 2 (2)								
	Not 0 (2)								
	Adjudicated 0 (2)								
	Grouped <input checked="" type="checkbox"/> <a href="#">Filter Options</a>								
<a href="#">ADD NEW</a> <a href="#">MOVE</a> <a href="#">COMBINE</a>									
	I	NI	NA	#	Type	Value	Original Author	Text	Actions
					1.0 (U) SUV Design				
	<input type="checkbox"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	1 (C3)	Tech/Mgmt Rating	6 - Green: Satisfactory	Claire Tank	Drive Train Design <input checked="" type="checkbox"/>
					1.1.3 (U) Transmission				
	<input type="checkbox"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	2 (C4)	Strengths	++	Claire Tank	Manual Transmission Options <input checked="" type="checkbox"/>

5

The body is prepopulated in the new comment. If the source comments have identical values in other fields, those values will also be copied into the new comment

**Moving Comments:** Follow these steps when evaluation team determines that a comment needs to be moved because it has been miscategorized.

Step	Action
1	Check the box next to the comment to be moved.
2	Click the Move button.
3	Select the new criteria for the comment
4	Click the Save button to open the comment.
5	The selected Comment is opened in a new comment. The evaluation

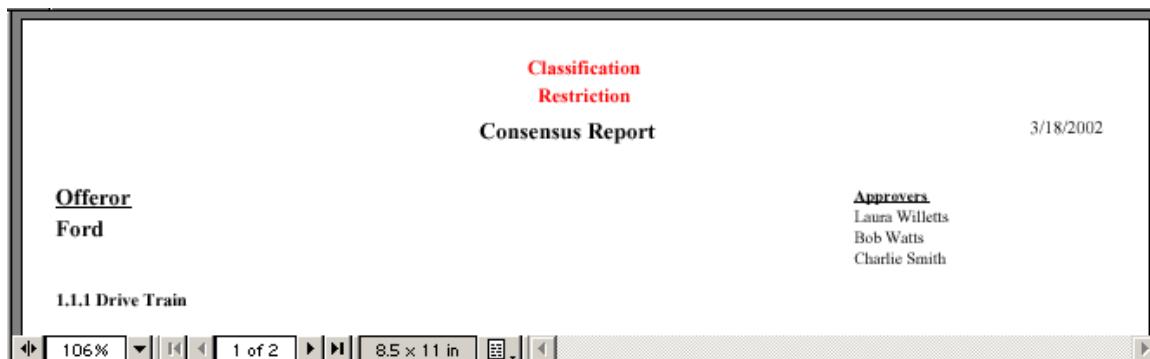
## Generating and Releasing Reports

**Generating Disposition Reports:** To generate a spreadsheet report of the consensus comments including their disposition information, select Comments Disposition from the Reports menu. Select the consensus report to run against and click the “Generate Report” button to download the file.

**Viewing Consensus Evaluation Report:** In addition to the standard table view, the consensus comments can be viewed in the same format that they will appear in the final document. To view this, click the Report tab.

Once on the Report tab, the included comments will display. Check the “Include Unadjudicated Comments” box to also display comments that have not yet been adjudicated. These will be marked so that the team knows that there is still work to be done.

**Generating CER Documents:** To download a draft report, click the “Download as File” button, found in the header on the Report tab. This generates a draft version of the CER for the user to download.



**Releasing a CER:** To release the report to the evaluators, select the Release button. In the modal dialog that appears, the evaluation manager can select whom to release the report to, select the appropriate function, and then release the report.

Once a report has been released for review, it is locked to prevent any further editing. This ensures that all reviewers are looking at the same content. If additional edits need to be made, click the Undo Release button, located in the header.

## Release for Approval

X

Offeror Training

Criterion 1.0 (U) SUV Design

Phase Phase 1

Approvers

Tom Harry  
Ryan Hill  
Claire Tank

i Important: Approvers are not required to release the consensus

CLOSE

RELEASE

## **Consensus Reports and Review**

**Finalizing Reports:** The next step is to finalize the CER. The user selects the Finalize button in the header of the Report tab. If all of the finalization criteria have been met, the user will be able to proceed with the finalization of the report by selecting the yes button.

## Messages

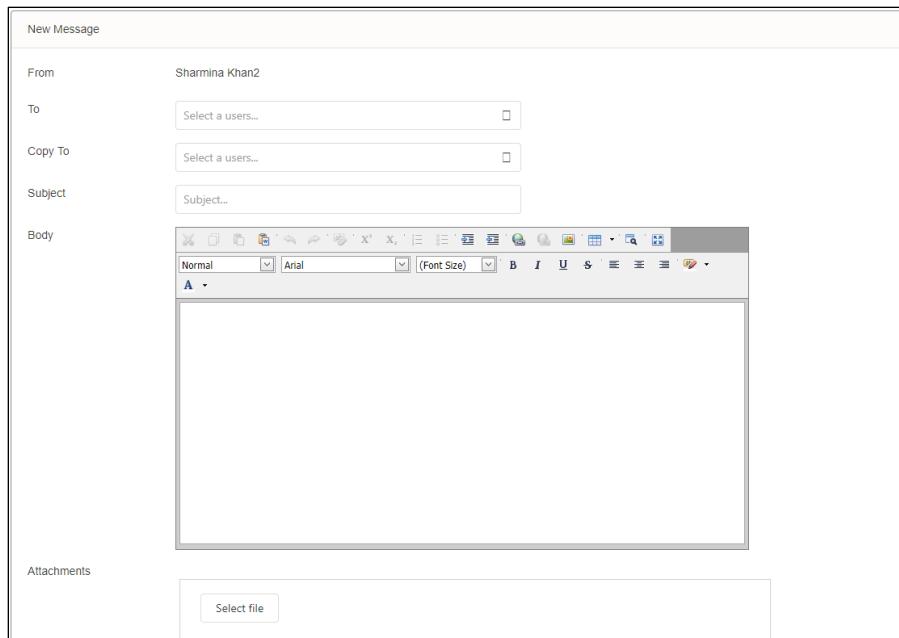
**Overview:** As with any group effort, working together and sharing information is vital. DecisionPoint incorporates a messaging capability to communicate information to the source selection team and between team members.

**Note:** *Messages created within DecisionPoint are part of the record; therefore, they should be related to the source selection and conducted in a professional manner.*

**Contents:** This section contains the following topics:

Topic	See Page
Inox	34
Replying	34

**Inbox:** Messaging in DP is like e-mail, only contained in the secure source selection database environment. The user can create a message by selecting the “Send New Message” button. A user can send a message to one or more other users and receive replies from them. As with comment creation, the user has the ability to attach files to their messages prior to sending them. Once the user’s message is complete and the recipients have been selected, the message is sent by selecting the “Send” button.



**Replying:** Users can Reply to messages by clicking “Reply” or “Reply to All” from the Inbox or inside the message.