Bidscale User Guide

VERSION 1.3

DECEMBER 4, 2025 - PREPARED BY BIDSCALE

Version History

Version	Date	Change Description	Modified By
0.1	07/07/2025	• First draft of the User Guide • Workflows for End User adoption added. Screens provided.	KF; BR; AR
1.0	08/04/2025	• Initiative setup (Section 4) was updated to include the new multi-step process • Document Automations (Section 5) updated to include both individual and bulk document generation • Evaluation setup (Section 6) was expanded to include step-by-step details for creating, configuring, and managing evaluations. Additional details were added for video evaluations. • AI Functions (Section 7) removed (redundant information) • Review and Approval section renumbered to 7 and expanded with clearer instructions for status updates, initiating/completing reviews, and canceling/approving workflow • Screenshots added throughout for increased clarity	KF; BR
1.1	09/02/2025	• Updated sections 6.2 and 6.3 for Evaluator layout updates • Updated section 6.3.1 for Evaluator AI enhancements • Updated section 5.3, 5.4, and 7 to include changes to the Files table of Initiatives and pre-writer download	KF
1.2	10/29/2025	• Updated section 4: New Initiative creation steps and creation tracker • Updated section 5.2: Bulk Generation • Update section 5.3: Writer changes • Updated section 6: AI Feedback for evaluator comments, new evaluation landing page layout, updated evaluation creation flow, new Evaluator Template Center	KF

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		• Updated section 7: All files now have status and the ability to Review/Approve	
1.3	12/4/2025	• Updated section 6: Changes to adding an offeror, offeror management, and file management on an evaluation	KF

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1: Introduction

1.1 Welcome to Your AI-Powered Contracting Platform

This guide provides a comprehensive overview of Bidscale, an AI-powered contracting platform designed specifically for federal agencies. Bidscale leverages artificial intelligence for document processing, automation, data prediction, and agentic workflows, offering a digital workspace for common contracting, acquisition, and procurement actions across the entire contracting lifecycle.

2: Getting Started

2.1 Request Bidscale Access

Your organization has a limited number of licensed user accounts, as outlined in your organization's Bidscale contract. To request an account, please email customersuccess@bidscale.com and include a brief explanation of your need and copy the Procurement Contracting Officer (PCO) on the Bidscale contract.

⚠️ *Important:*

- Bidscale may require confirmation from the PCO before provisioning the account. In certain cases, your organization may assign a system administrator with account provisioning permissions.
- If you are a DOD user, you will be required to use a CAC/PIV card to access the Bidscale web application within the **Boundary Cloud Access Point (BCAP)** per DISA security requirements. If you do not have a CAC or PIV card please work your agency to obtain one. If you are a support contractor, work with your company to gain access through ECA (External Certificate Authority).

Once approved, you will receive a Rules of Behavior (ROB) form to review, sign, and return via email. After confirmation, Bidscale will provision your account. You will then receive an automated welcome email from noreply@bidscale.com with your login instructions.

> *Subject: Welcome to Bidscale*
> *Welcome to Bidscale! We're excited to have you on board.*
>
> *Your account is now ready for activation. Please activate your account within the next 7 days by logging in to https://select.bidscale.app/_/login and entering the following details:*
>
> *Username: [Your email]*
>
> *Temporary Password: [Your temporary password]*
>
> *If you have any questions or need assistance, feel free to reach out to customersuccess@bidscale.com. We look forward to supporting you on your journey with Bidscale!*

2.2 Log into Bidscale

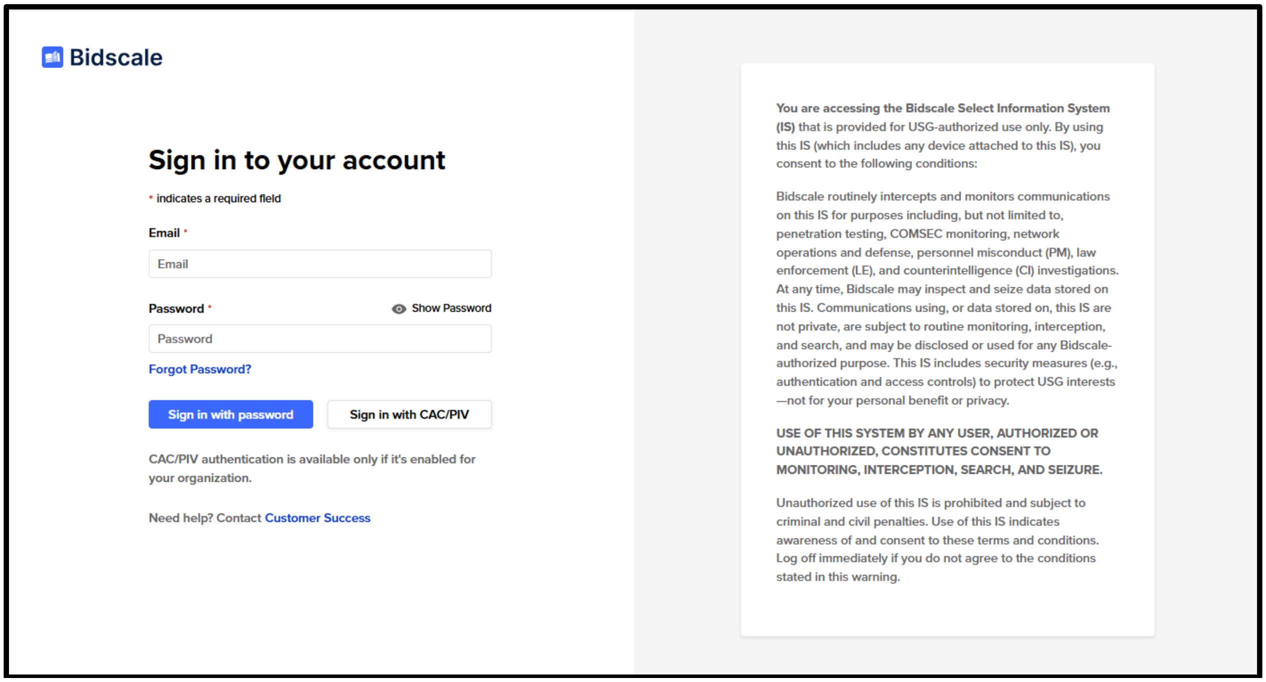

Figure 1: Log-In Screen

Figure 1: Log-In Screen

Before using Bidscale, complete the following steps to access and secure your account:

1. **Go to** https://select.bidscale.app in your web browser.

⚠️ *Important:* To access the platform you must be located within the continental United States or connected to CONUS VPN.

2. **Enter** your email address in the 'Email' field.
3. **Enter** your temporary password in the 'Password' field.
4. **Select** 'Sign in with password.'

⚠️ *Important:* Be careful not to copy any extra spaces when pasting your temporary password—this is a common login issue.

5. **Create your permanent password** when prompted. Choose a strong, secure password you'll remember.

Once logged in, you'll be directed to the Bidscale homepage where you can begin using the platform.

2.2.1 Multi-Factor Authentication (MFA)

If your agency has MFA enabled (common for enhanced security), you'll complete one additional login step:

- After entering your email and password, a **security code** will be sent to your inbox from **noreply@bidscale.com**.

Subject Line: Bidscale - MFA Code

Email Content: Your MFA code for secure login is [6 digit number]

⚠ *Important:* If you are not receiving the security code email please check your Junk inbox to make sure that it has not been filtered out as spam.

- Retrieve the code and enter it into the MFA field on the login screen.

⚠ *Important:* Be sure not to include any trailing spaces when entering your password or MFA code—this may cause login errors.

2.2.2 CAC/PIV Login

If your agency permits **Common Access Card (CAC)** or **Personal Identity Verification (PIV)** login, you can link your card after setting up your Bidscale account.

To link your card:

- After your first successful login, you'll be automatically prompted to link your CAC/PIV.
- Follow the on-screen instructions to complete the process.

Once linked, you can log in using just your CAC/PIV card—streamlining access while enhancing security.

Need to link it later?
Go to **Account > Account** to link your CAC/PIV card at any time.

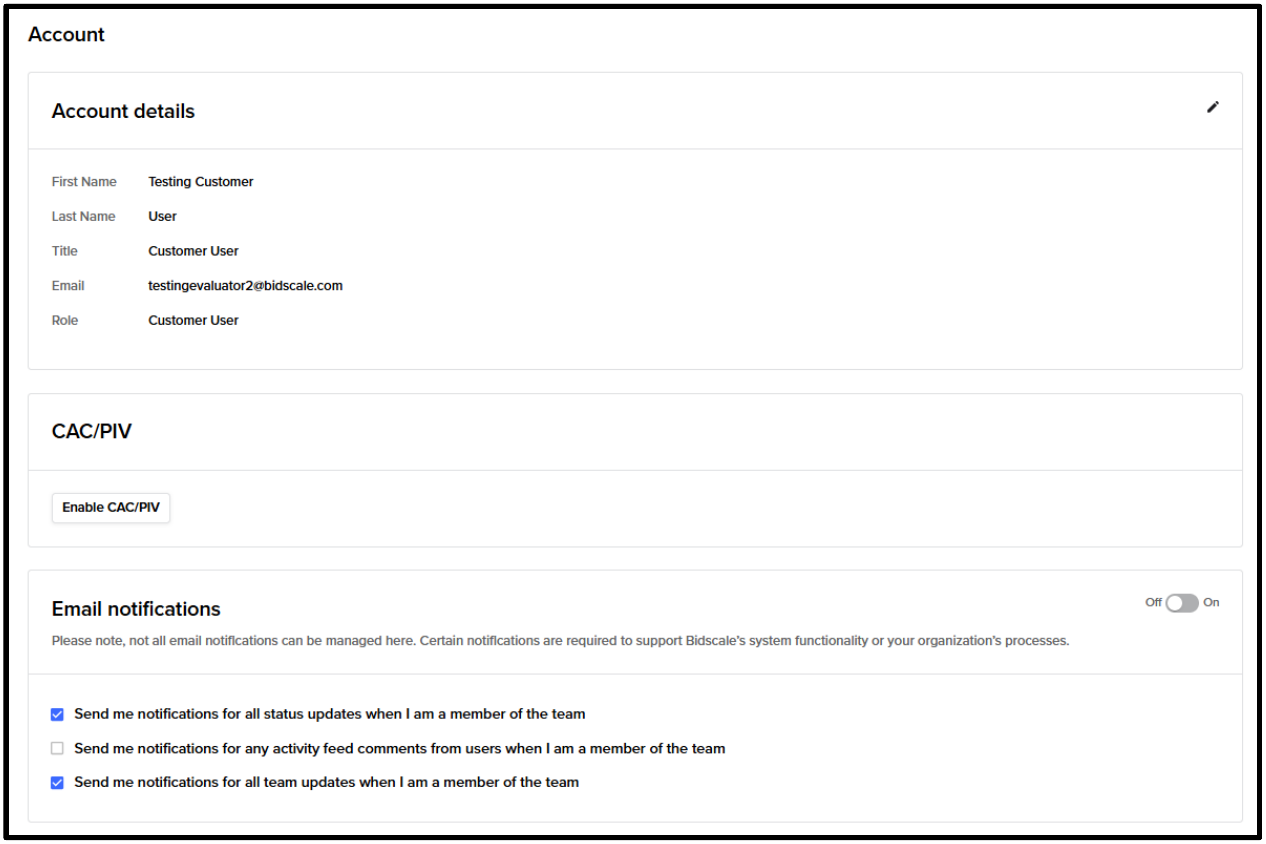

Figure 2: Account page with CAC/PIV section

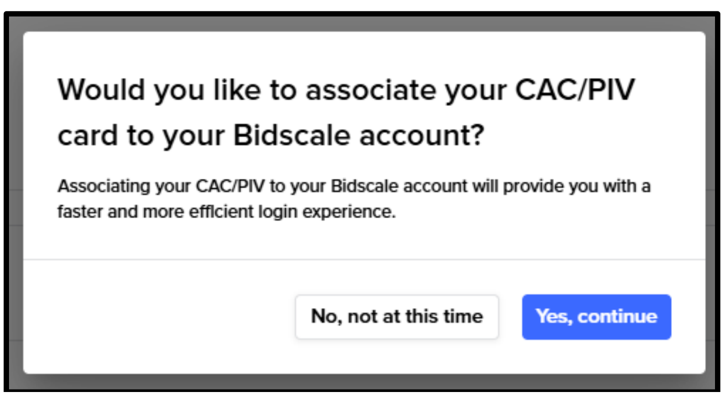

Figure 3: CAC/PIV Integration Step 1

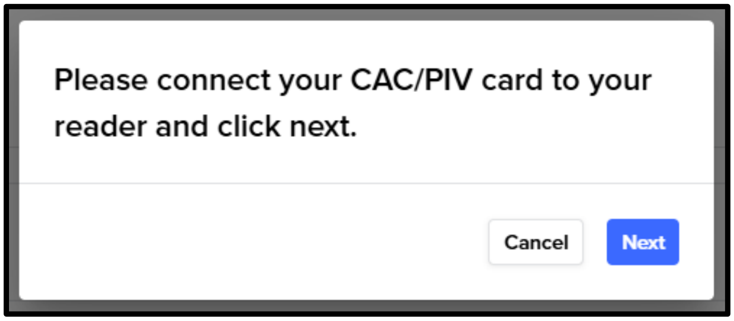

Figure 4: CAC/PIV Integration Step 2

2.3 Roles and Permissions

Bidscale uses a flexible **Role-Based Access Control (RBAC)** framework to align user permissions with agency needs.

- **User Roles** determine what each user can view, edit, or manage. Roles can be **predefined** (e.g., *Admin*, *Contracting Specialist*, *Evaluator*) or **customized** to match agency workflows or clearance levels.
- **Permissions** are scoped across key modules—such as *Initiatives*, *Evaluations*, *Documents*, and *Reports*. Admins can control actions like:
  - Uploading documents
  - Setting up solicitations
  - Assigning tasks
  - Generating reports
- **Admin users** manage RBAC settings at the system level. They can:
  - Add or remove users
  - Assign or change roles
  - Adjust permissions as team structures evolve

RBAC ensures each user only accesses content relevant to their responsibilities—improving both security and ease of use across the acquisition lifecycle.

Bidscale includes several predefined roles to support common acquisition workflows. Each role grants specific permissions aligned with typical responsibilities:

Role	Who it's for	Key Capabilities
Administrator	Designated tenant-level leads	Configure templates, manage users, assign roles, manage workflow settings
Contracting Management	CO/KO groups with oversight duties	View and manage all service requests and initiatives; no access to user administration

Contracting User	CO specialists and acquisition staff	Contribute to initiative documentation and task execution; limited to assigned initiatives
Customer Management	Program/requirements leads	Submit intake data, review documents, initiate actions via questionnaires
Customer User	Program contributors	Limited view/edit permissions to assigned initiatives; may support attachments or technical inputs
Finance	Budget/financial analysts	View and comment on financial documents; cannot initiate or modify workflows
Evaluator	Evaluation board members	View proposals, enter findings, score criteria; access limited to assigned evaluations

Bidscale will assign your role with the approval of your Procurement Contracting Officer (PCO) and/or Bidscale Administrator. We follow the principle of least privilege when assigning roles. Please contact them with any questions or concerns regarding your role assignment.

3: Home Page

3.1 Home Page Layout and Navigation

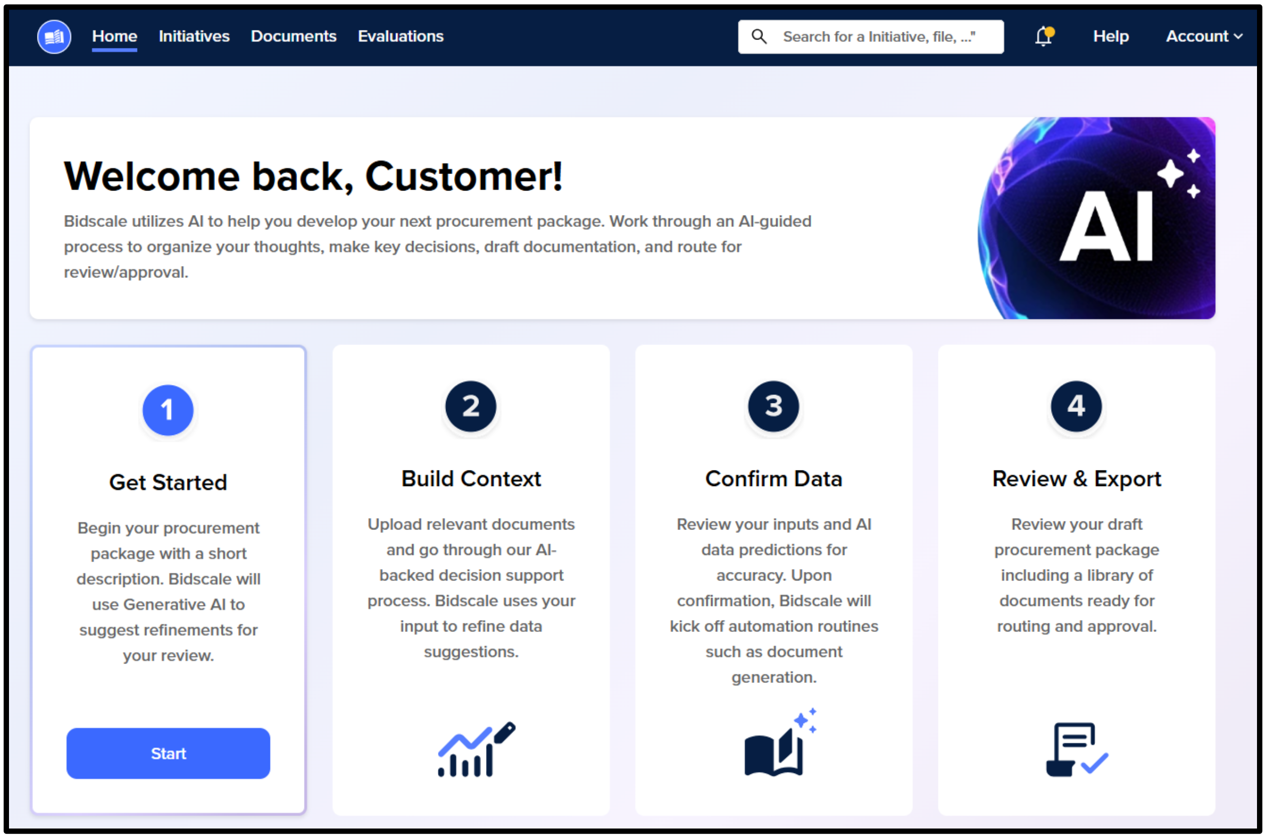

Figure 5: Every Bidscale journey begins with the "Get Started" Action Tile

The Home page is the first screen you see after logging into Bidscale. It serves as your central dashboard, giving you quick access to the core tools and any active work you're involved in.

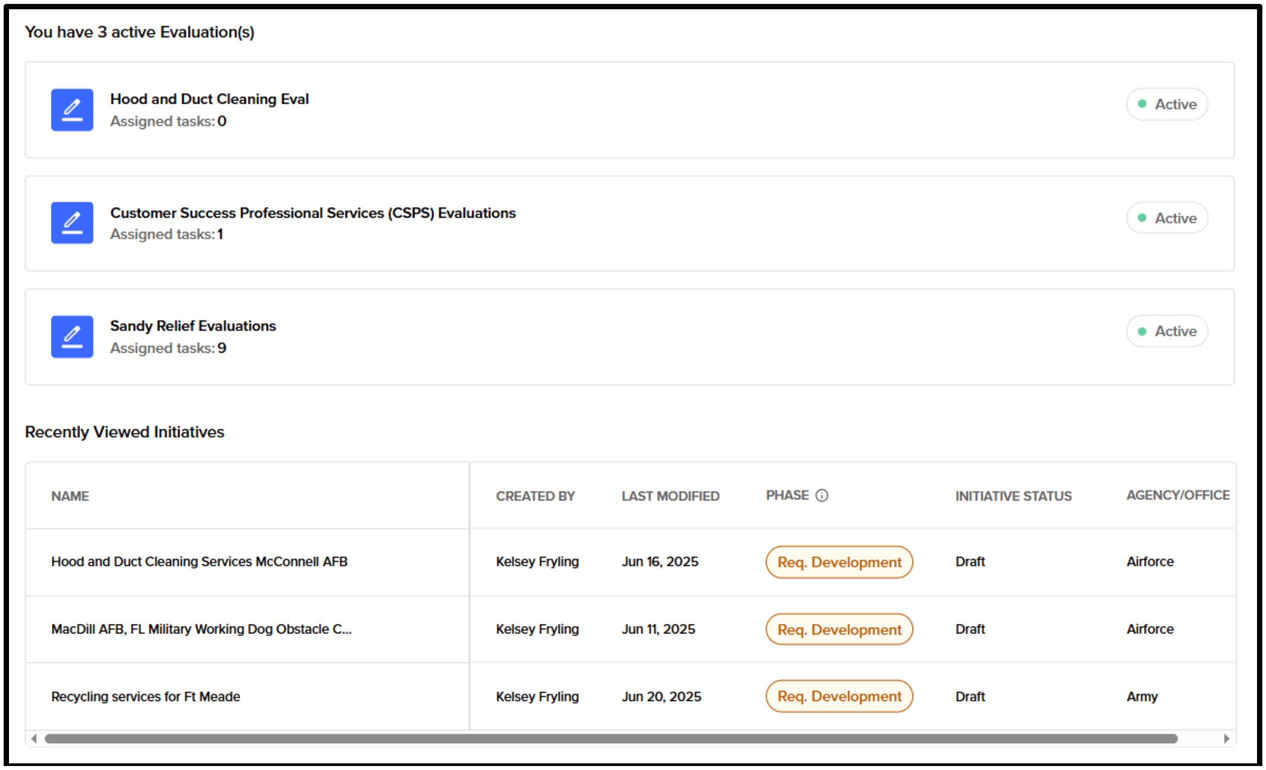

Figure 6: Active Evaluations and recent Initiatives at the bottom of the Home page. If you do not have any active evaluations the section will not display

From the **Home page**, you can:

- **Start a new Initiative** using the **Start** button in the *Get Started* section

⚠️ *Important:* Your agency may use an alternate label for Initiative. If so, you may see a different term displayed in the blue bar at the top of the page in place of Initiative and that term will be reflected throughout the system. In this user guide we will use the Initiative label.

- **Jump back into recent work** with shortcuts to Initiatives, Documents and Evaluations you've recently accessed
- Use the **top navigation bar**, which stays visible throughout your session, to switch between modules or return home at any time

This layout is designed for efficiency—keeping your work accessible and minimizing clicks.

Top Navigation Functions

- **Home** – Returns you to the Bidscale home page
- **Initiatives** – Opens an All Initiatives list page
- **Documents** – Opens an All Documents list page
- **Evaluations** – Opens an Evaluations list page

- **Search** – Find any Initiative or file by name
- **Notifications** – View updates related to your tasks or team activity
- **Help** – Open a pre-filled email to contact Bidscale Support
- **Account** – View your name and email, access account settings, or sign out

4. Setting Up Initiatives for Automations

On the homepage, click the **Start** button in the first tile to begin the following multi-step process to create your Initiative.

4.1 Step 1: Provide Initiative Title & Description

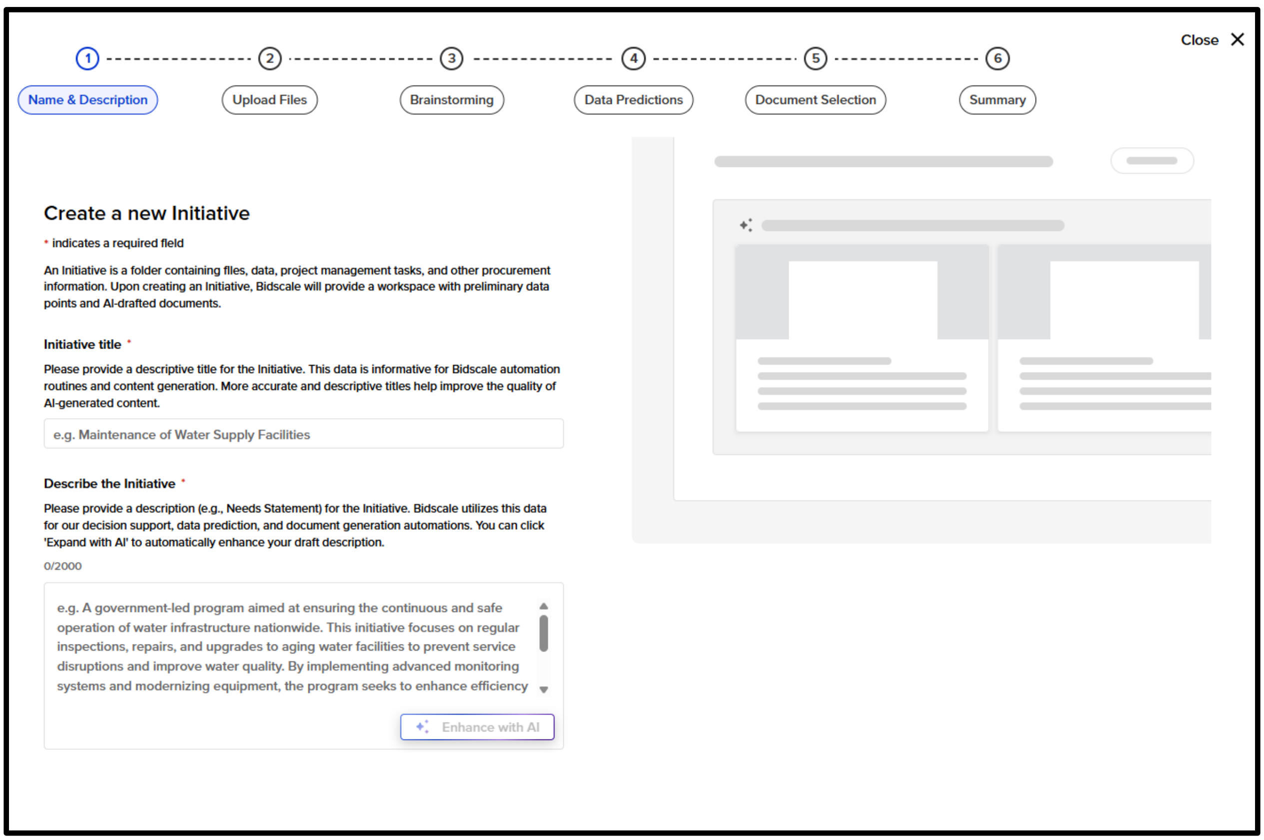

Figure 7: Step 1 of Initiative creation

Start by giving your Initiative a clear, descriptive title and a concise description of the acquisition need. This foundational step helps Bidscale understand the scope of your effort, enabling smarter AI support downstream.

A strong description improves:

- Draft Statements of Work (SOWs)
- Sections L and M recommendations
- Targeted market and data predictions

⚠️ *Important:* Click the **"Expand with AI"** button after describing your Initiative. This capability leverages Bidscale's Generative AI, enriching your description with relevant federal context—drawing from sources like SAM.gov and your agency's internal data (Tenant RAG). This step significantly enhances the relevance and accuracy of all future outputs.

If your **Initiative Description** contains fewer than 500 characters, an AI Assistant window will automatically appear. This window includes the following tools and information to help you strengthen your entry:

- **Description Strength Meter** – Provides a visual indicator of how detailed and complete your current description is.

- **Enhance with AI** Button – Allows you to generate a more robust version of your description using AI.

- **AI Enhancement Context** – Offers a brief explanation of what the Bidscale AI uses (e.g., related initiative details, objectives, or patterns) to improve your description if you choose to enhance it.

This feature is designed to help you quickly generate clear, compelling, and complete initiative descriptions with minimal effort.

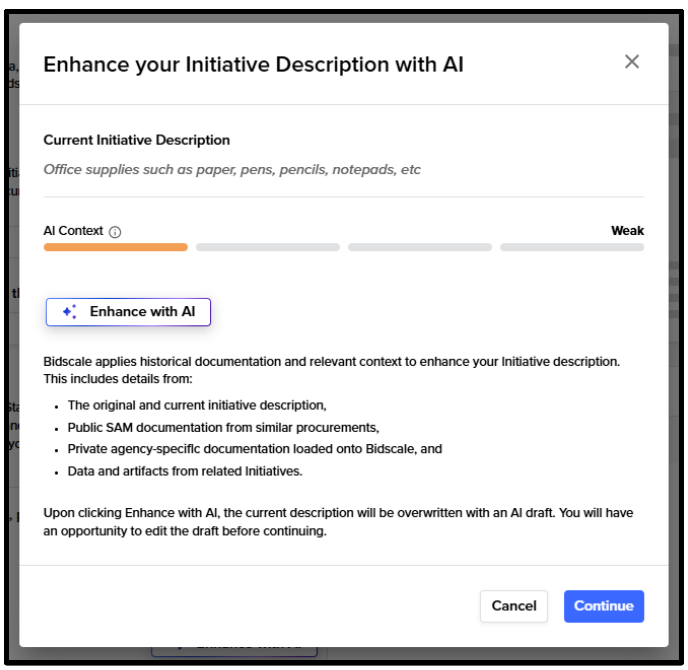

Figure 8: AI enhancement window that displays upon Continue in step 1 of Initiative creation when your description is less than 500 characters

If you select **Enhance with AI** in this window, the window will close and you will be returned to the first Initiative creation step.

Selecting **Continue** on the **Create a new Initiative page** will take you to step 2 of the Initiative creation flow where you will be able to upload a file(s) to provide additional context.

4.2 Step 2: Upload Files (Optional)

While not required, uploading contextual files will significantly enhance the relevance and quality of AI-generated recommendations.

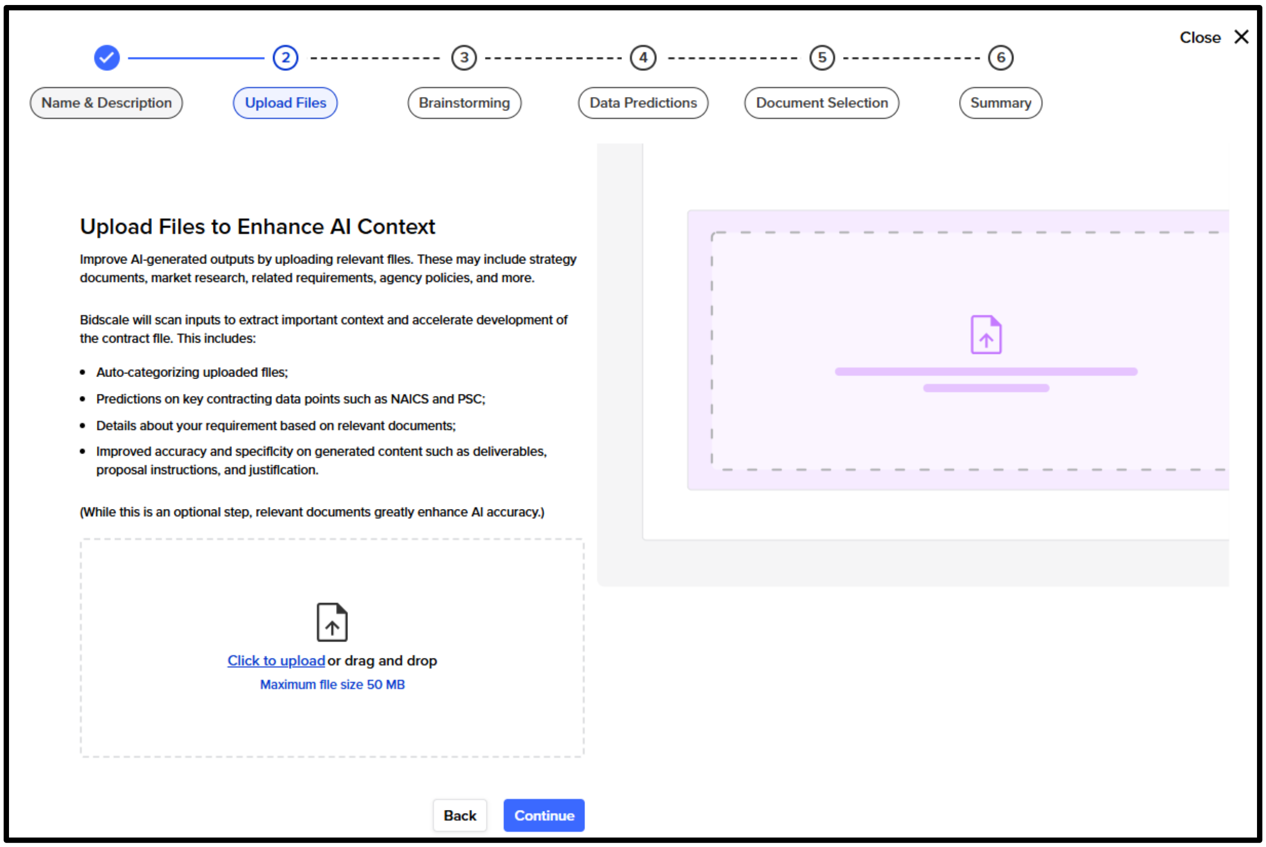

Figure 9: Step 2 of Initiative creation - upload files

Upload any supporting documents that can inform the AI about your Initiative. These might include:

- Requirements Documentation
- Previous solicitations or performance work statements
- Market research reports
- Internal memos, capability briefs, or decision memos
- Applicable policies or compliance artifacts

⚠️ *Important:* File types are limited to Word, PDF, and Excel with a file size of 50 MB.
Uploaded documents are parsed by Bidscale AI to:

- Automatically label and organize files based on content

- Predict NAICS, PSC codes, and other key data points
- Extract requirement-specific details for later use in document generation
- Improve the precision of deliverables, evaluation criteria, and justification templates

If you would like to skip this step, simply select **Continue** to move to step 3.
Bidscale will also provide a high-level AI summary of a document's content within the Initiative detail after the flow is complete. Ideal for quickly understanding lengthy materials.

4.3 Step 3: Answer Brainstorming Questions (Optional)

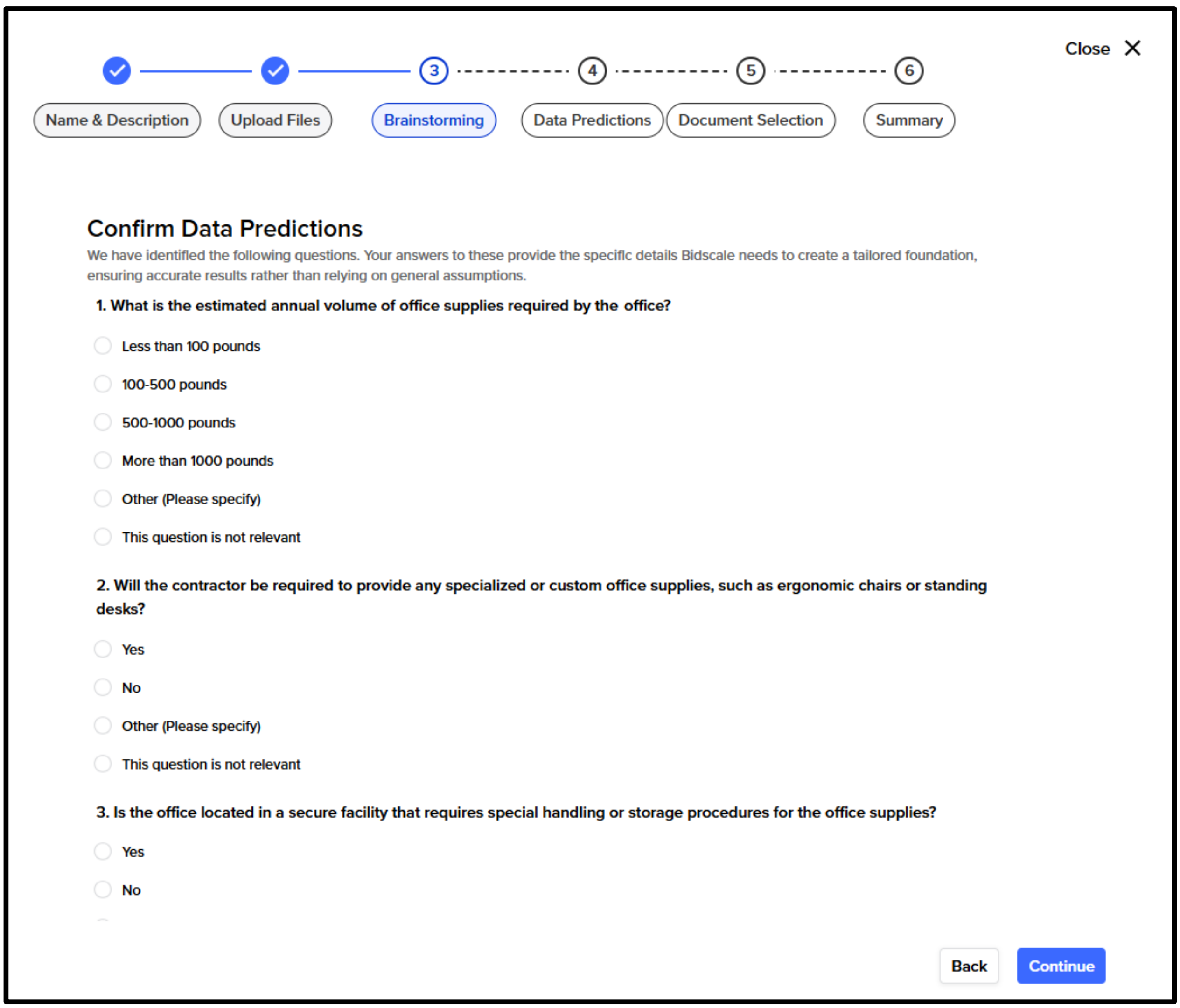

Figure 10: Step 3 - Answer AI powered brainstorming questions

Brainstorming with AI: Add Context to Your Initiative

After entering your Initiative title, description, and any supporting documents, Bidscale offers an optional **AI-guided brainstorming**. This step helps you clarify the requirements and enriches context for more accurate AI support.

These are **not acquisition strategy prompts**. Instead, they focus on understanding the core need:

- What is requested?
- What does success look like?
- What are the known requirements, constraints, or desired capabilities?

The clearer this picture is, the better Bidscale can assist with:

- Drafting Statements of Work (SOWs) or Justifications & Approvals (J&As)
- Predicting key data points
- Structuring evaluation content

Don't have all the answers yet? No problem. You can **skip the questions** by selecting **Continue** and return later. Even partial answers improve the system's ability to support you.

You can revisit this brainstorming flow anytime from your Initiative view by selecting it in the blue **Next Steps** box on the Initiative **Overview** tab.

4.4 Step 4: Confirm Data Predictions

Review the AI-recommended values for **Category**, **NAICS**, and **PSC**. There will be a **top suggestion** for each field and the ability to choose or search for an alternative to ensure your Initiative reflects the right scope and strategy from the start. You will still be able to update these values later in the Data tab if needed.

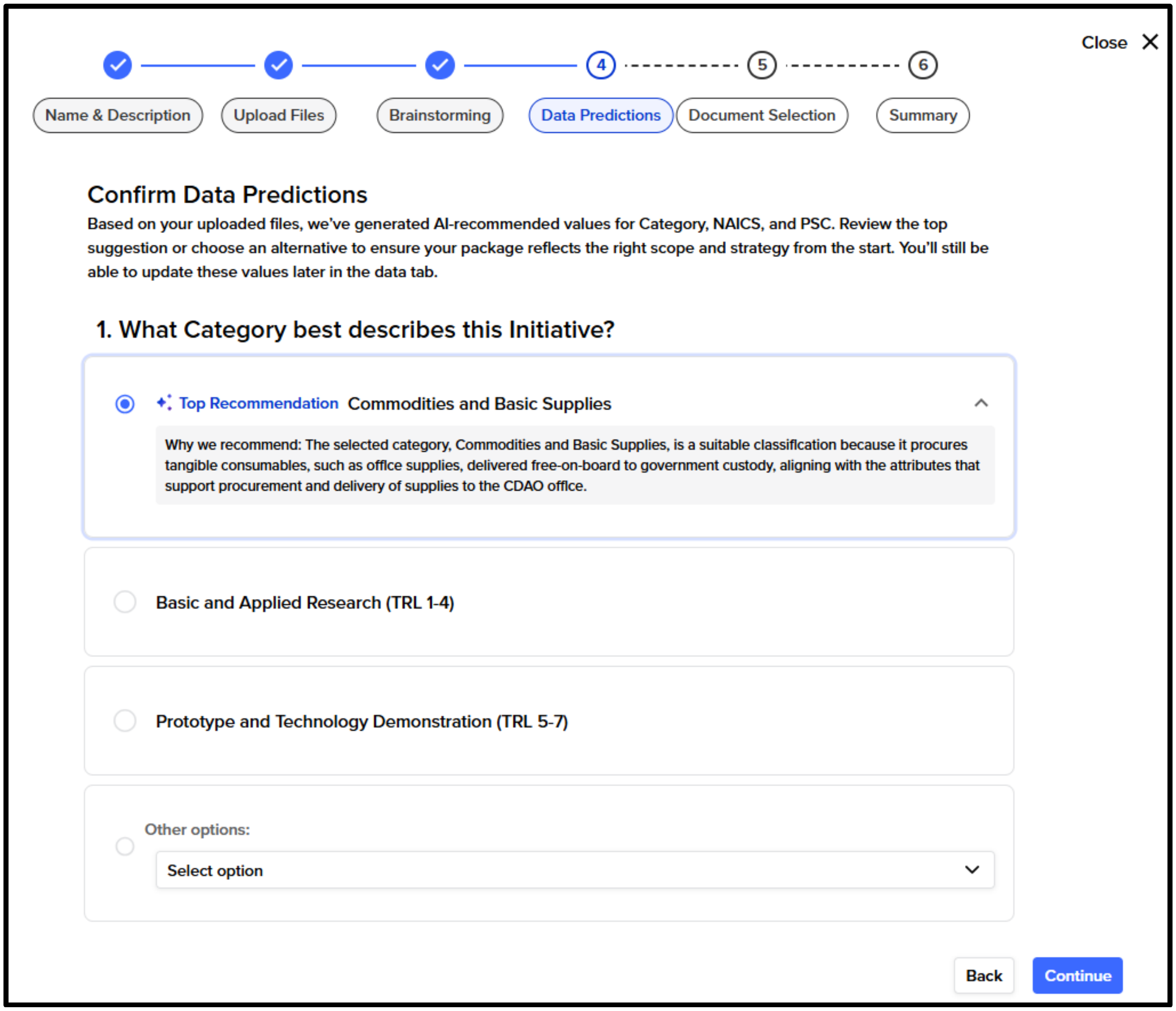

Figure 11: Confirm Data Predictions

4.5 Step 5: Confirm Pathway Prediction and Documents

Review the AI-recommended value for **Pathway**. There will be a **top suggestion** and the ability to choose or search for an alternative. You will still be able to update these values later in the Data tab if needed.

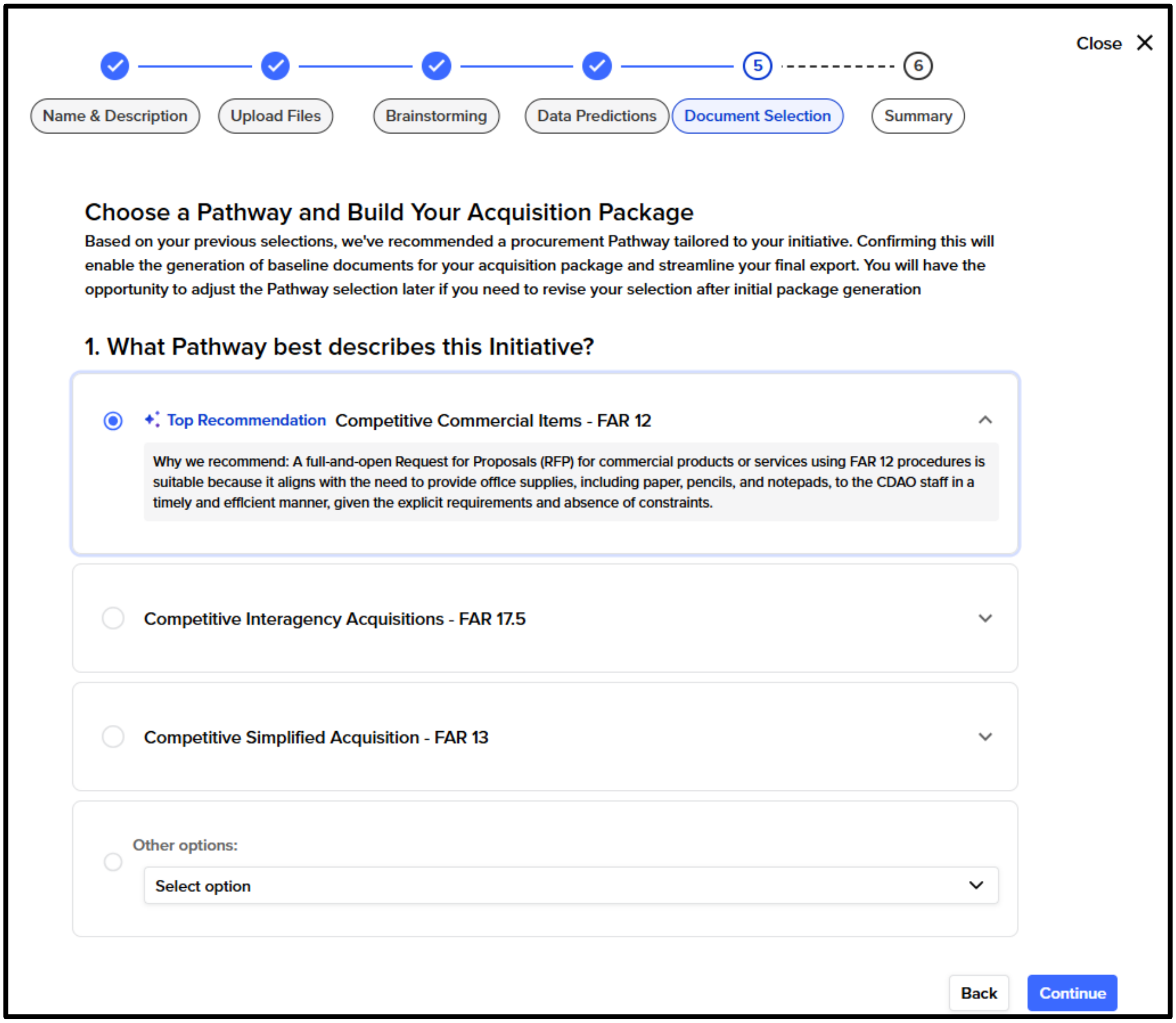

Figure 12: Pathway selection

After selecting a Pathway, review the documents that are suggested for that Pathway. These documents will be those that more commonly are included when that Pathway type is used. You can easily deselect any documents you do not want included.

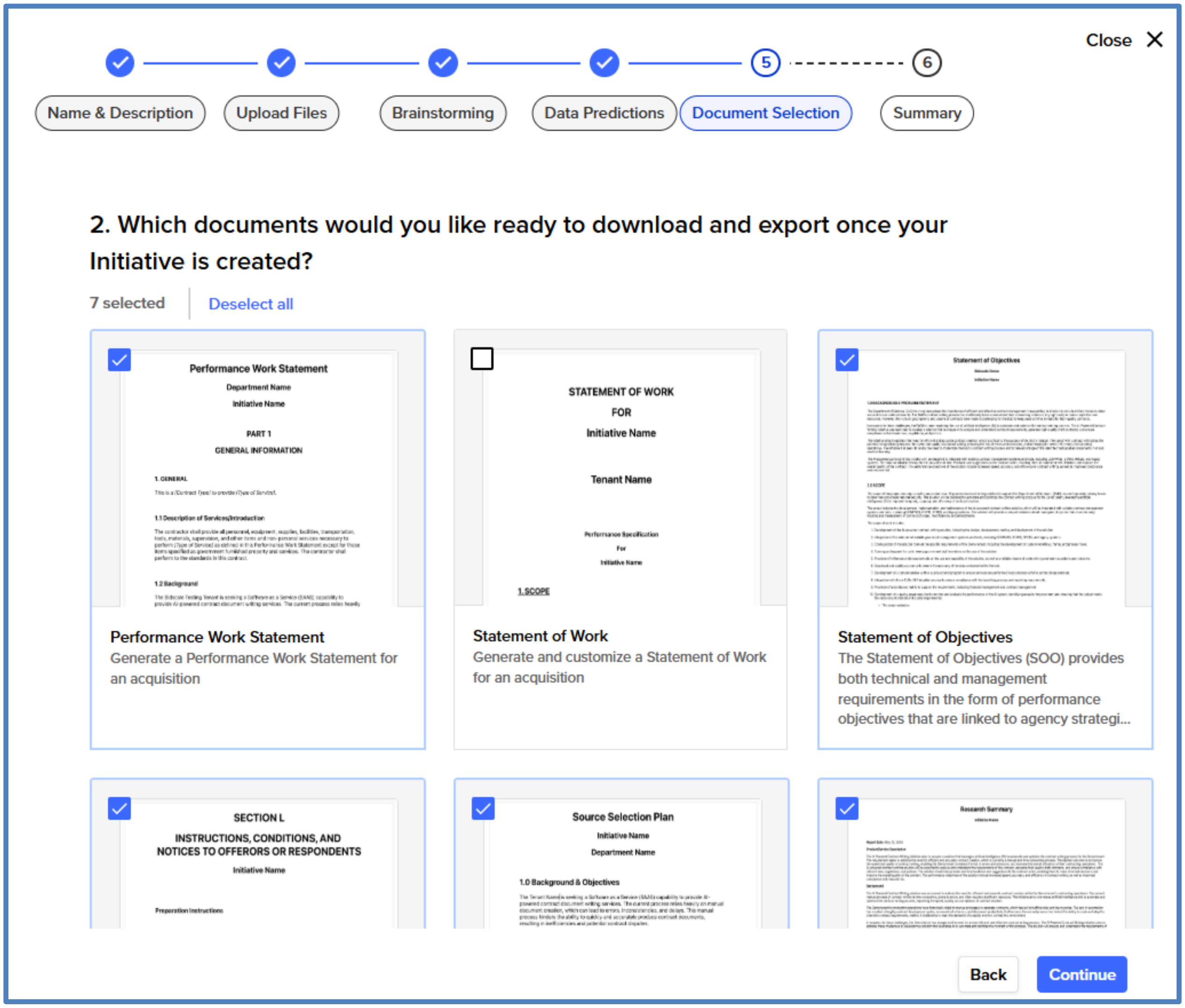

Figure 13: Recommended documents for the selected pathway with one document deselected

4.6 Step 6: Summary

Once all steps are completed a summary page of selections will be displayed. Review the summarized items and make any final edits as necessary by selecting the Edit pen icon in each section. Once you have completed your review, select Submit to navigate to the Initiative's Overview page.

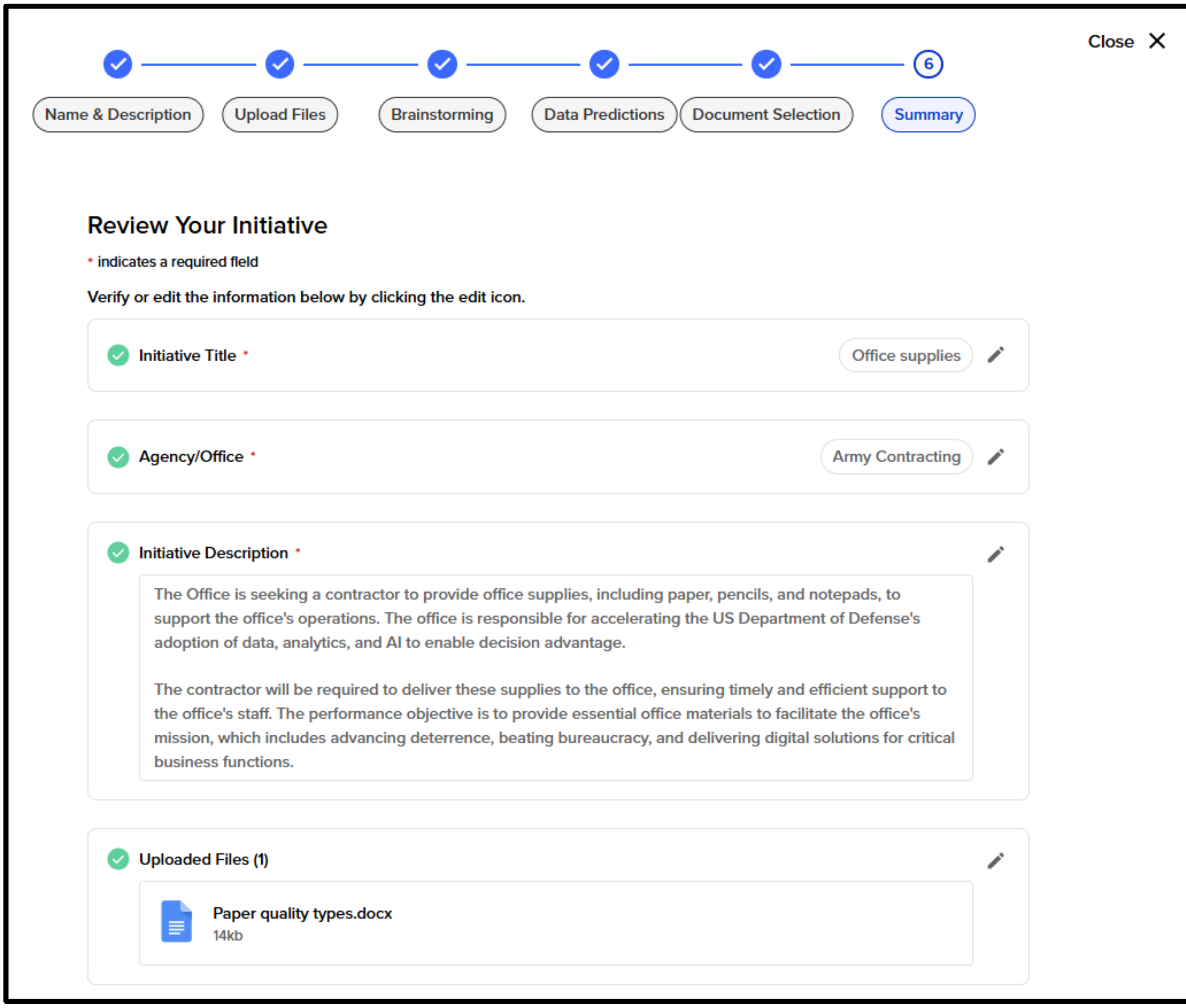

Figure 14: Initiative creation summary

4.7 Custom Workflows and Automations

Bidscale uses AI-powered **Task Templates** to automate and optimize common contracting workflows. Each template provides a pre-defined sequence of actions and dependencies, helping teams:

- Maintain consistency
- Reduce manual errors
- Navigate complex procurement stages with greater ease and compliance

Task Templates can be:

- **Configured by System Administrators**
- **Custom-built by the Bidscale Team** for more advanced workflows

These templates ensure that acquisition processes stay organized, traceable, and aligned with best practices—without requiring users to build steps from scratch.

5: Document Automations with AI

Bidscale includes robust **Document Automation** tools that use AI to generate high-quality, compliant contracting documents tailored to the context of your Initiative. Generation of documents can be initiated individually or in bulk.

5.1 Individual Document Automations

This capability is designed to generate key documents required for your acquisition package individually. The Template Center can be accessed from the **Document** page or from the **Files** tab within an Initiative. Here you can select a document template for generation.

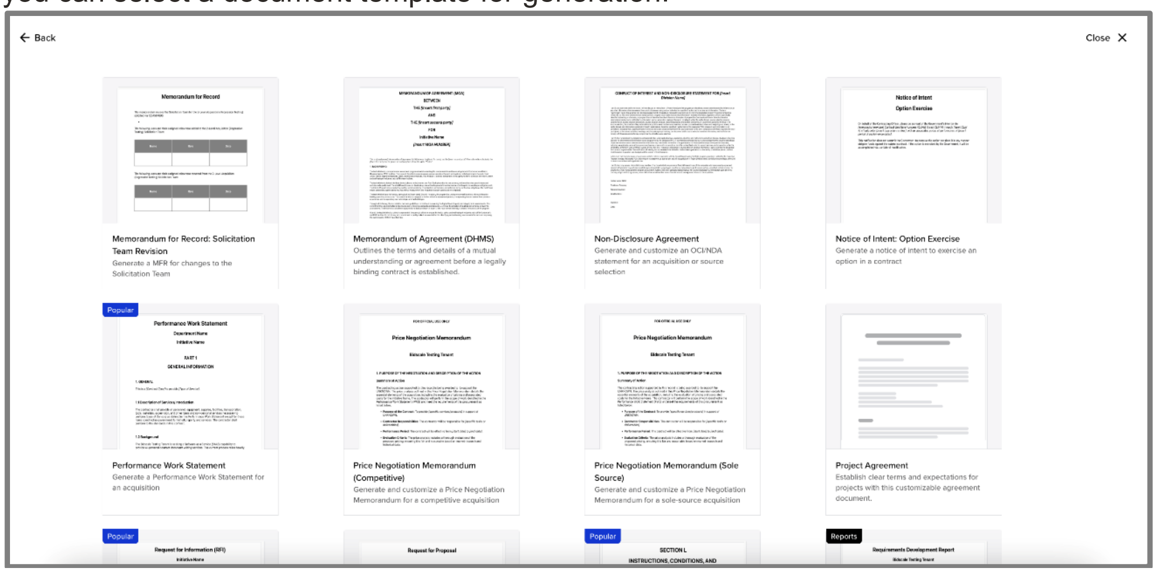

Figure 15: Document Automation template selection

By leveraging the context from Initiative details, uploaded files, and brainstorming sessions, Bidscale can automatically draft items such as:

- Statements of Work (SOWs)
- Performance Work Statements (PWSs)
- Section L: Instructions to Offerors
- Section M: Evaluation Factors for Award
- Justifications and Approvals (J&As)
- And more

This reduces manual drafting time and helps maintain consistency with your documented requirements.

5.2 Bulk Generation

Once your Initiative is created—regardless of whether you've uploaded documents or completed the AI brainstorming—Bidscale can be configured to automatically begin **bulk generation**. Documents are bulk-generated for the user to either open within an in-browser editor or in word processors as exported .docx files.

This step accelerates your path to an acquisition package by generating a tailored set of draft-ready documents based on your inputs.

Using your Initiative description, uploaded files, and any Q&A responses, Bidscale can generate documents such as:

- Draft **Performance Work Statement (PWS)**
- Section **L and M** language
- **Request for Information (RFI)**
- **Justification & Approval (J&A)**
- **Memorandum for Record** summarizing predicted data points (e.g., NAICS, PSC, contract type, period of performance)

These drafts are meant as **starting points**:

- Some may be ready for immediate use
- Others may include **placeholders or highlighted gaps**, such as missing evaluation factors or vague scope elements
- In these cases, the system may suggest questions or alternate language to help refine your requirement

You're not required to use every document. Think of this as a **customizable, fast-start toolkit**—context-aware, editable, and designed to save time.

Next Steps:

- Download documents individually or in bulk
- Route for review or begin collaborative editing
- Move into formal acquisition planning with a strong foundation

5.3 Document AI Edits in Bidscale

Once documents are generated, they can be opened in the **Writer interface**—an in-browser editor equipped with advanced AI capabilities. The quickest way to open a document in Writer is to locate the document on the Files tab of an Initiative, select the **view icon** in the Actions column, and then the **Open in Writer** button. Alternatively, you can also select the **document name** to display the same preview screen as the view icon.

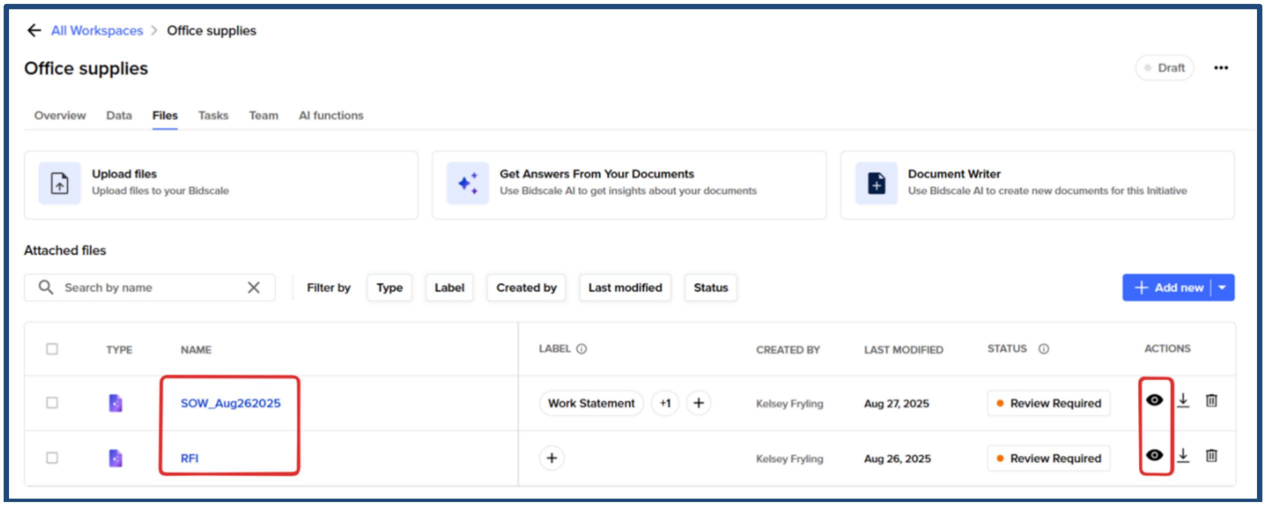

Figure 16: How to access document preview before accessing Writer

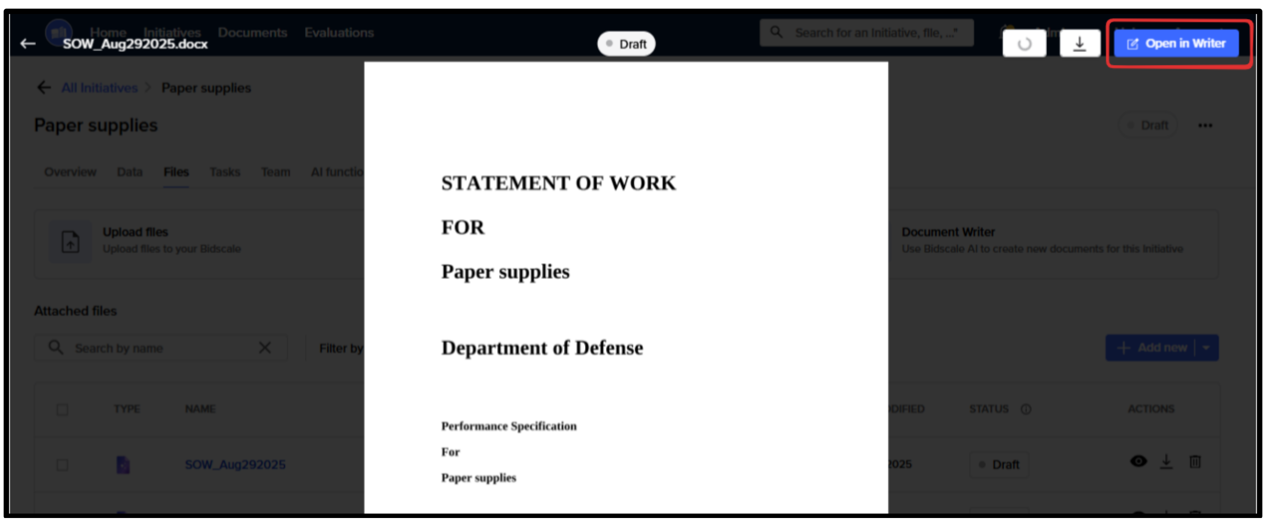

Figure 17: Opening Writer from document preview

Sections containing **AI-generated suggestions** are clearly highlighted for your review and approval. You can easily edit these sections by requesting the AI to rewrite within the Bidscale AI comment. If any direct text editing is required, you will need to export the file to your computer and open the document in the text editor of your choice.

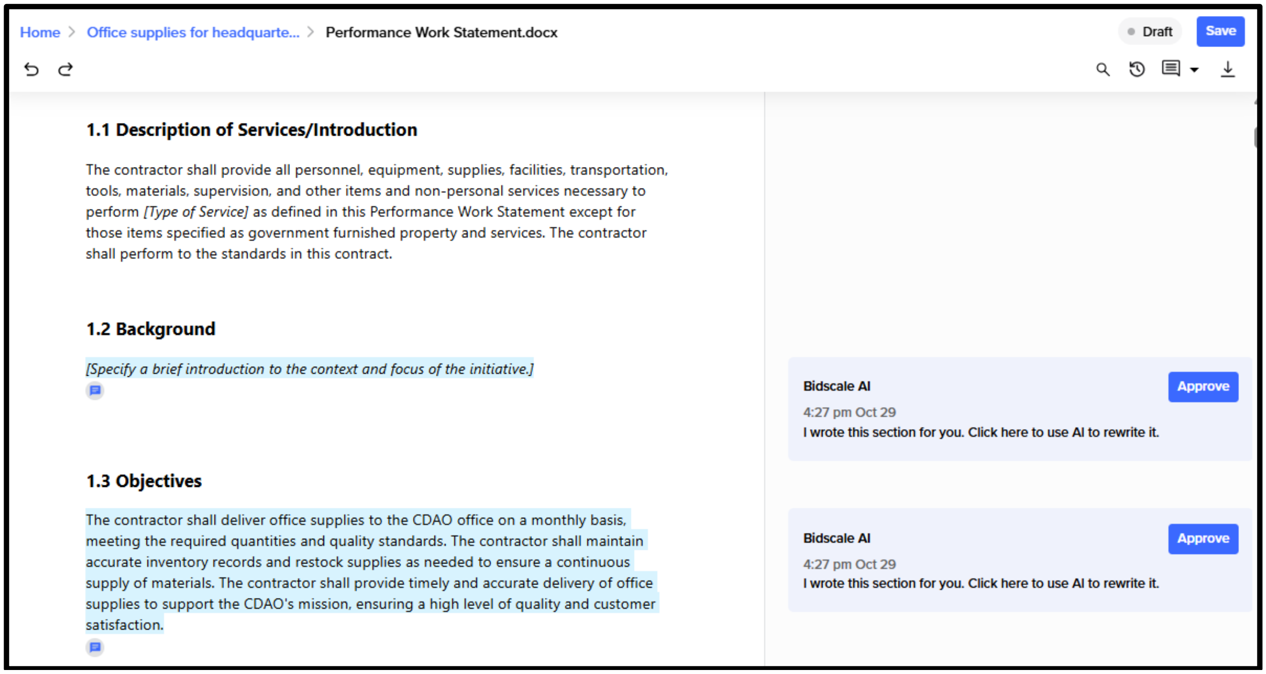

Figure 18: Writer, an in-browser AI enhanced viewer complete with AI Assistant

AI Chat with Documents
Ask questions directly against an uploaded file. The AI will search the document content and respond based on relevant context. The AI chat feature can be found in the middle tile on the Files tab of an Initiative.
Doc Reviewer
Some documents support AI agent reviews that apply heuristics or evaluation criteria to assist in assessments.

5.4 Exporting Documents from Bidscale

Documents created in Bidscale can be easily downloaded and saved to your computer. You can export documents individually or in bulk.

There are several locations you can download individually from within an Initiative. If a document is generated via an Initiative task you can download it directly from the **Next Steps** section of the **Overview** tab via the **Download** button. If it was not generated via a task, a document can be found on the **Files** tab. Locate the desired file and select the **download icon** in the **Actions** column. You may also download from the **document preview window** or from within the **Writer** interface. Examples of each of these options are displayed in the figures below.

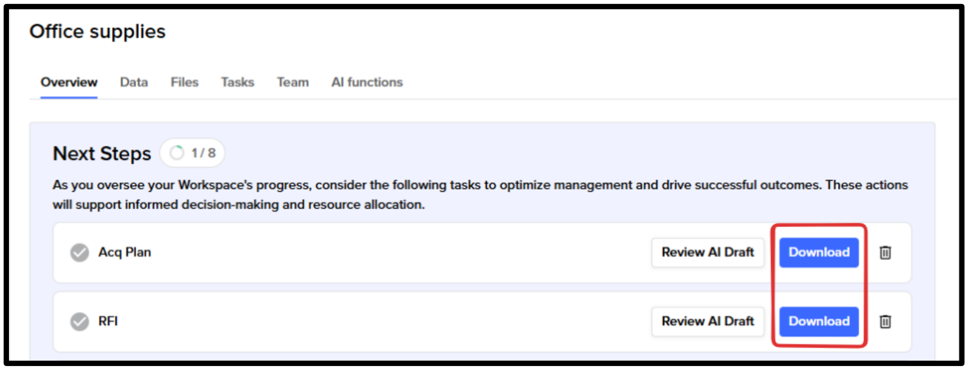

Figure 19: Download option from the Overview tab

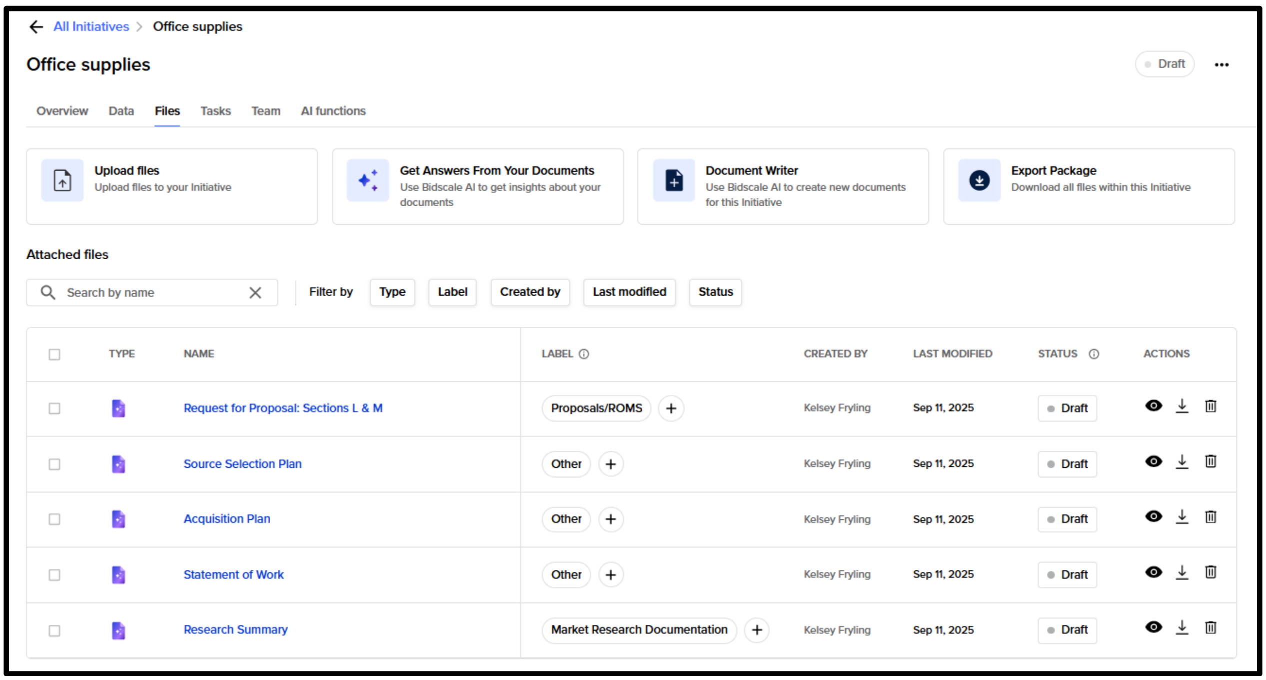

Figure 20: Download option from the Files tab

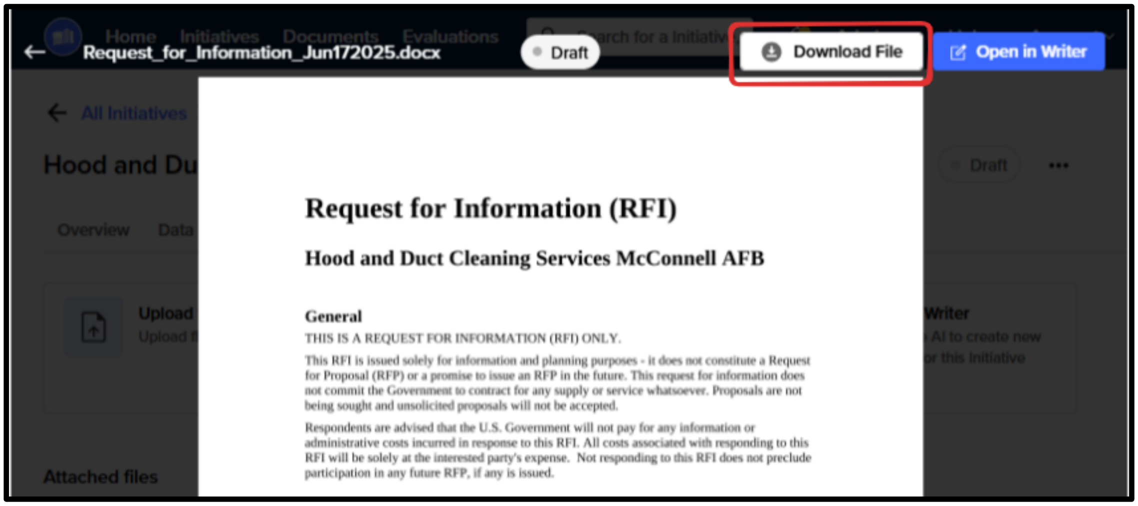

Figure 21: Download File button from the document preview window

Figure 22: Download button from the Writer interface

Bulk download of all Initiative documents in a zip file can be completed from two locations within an Initiative. From the **Overview** tab, use the **Bulk Export** task to quickly download all of the files via an **Export Package** button. The same action can be completed on the Files tab via an **Export Package** tile that will display above the Files table.

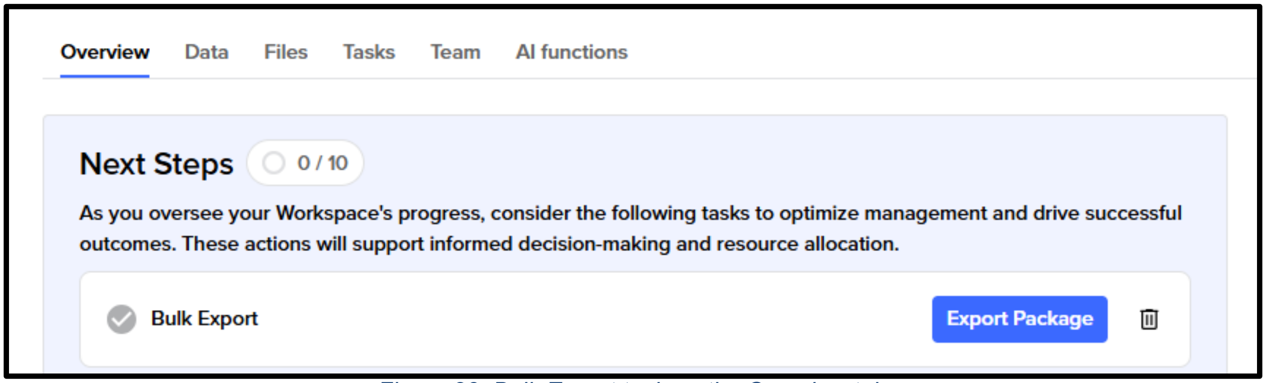

Figure 23: Bulk Export task on the Overview tab

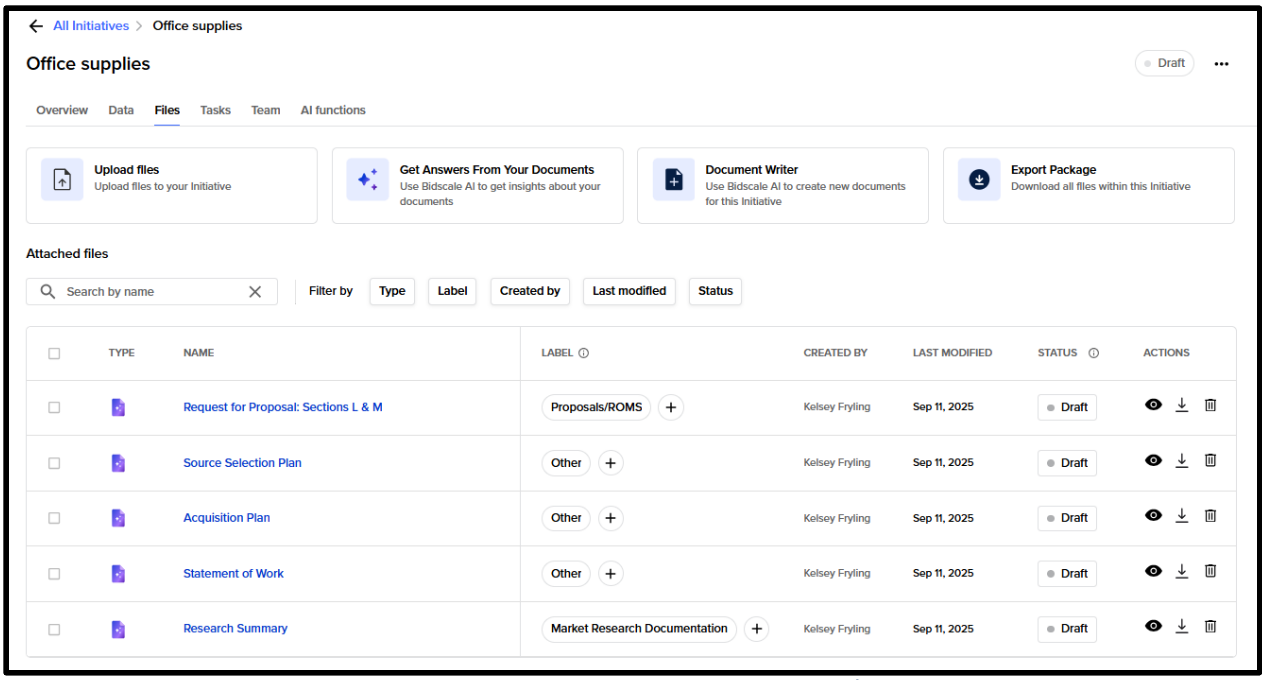

Figure 24: Bulk Export tile on the Files tab to the far right

6: Evaluations

Evaluations in Bidscale are designed to support source selection in a **digital, auditable, and efficient** environment. While evaluations are tied to an Initiative, they operate under a **separate permissions model** and feature set—providing clear separation of duties and greater control throughout the evaluation process.

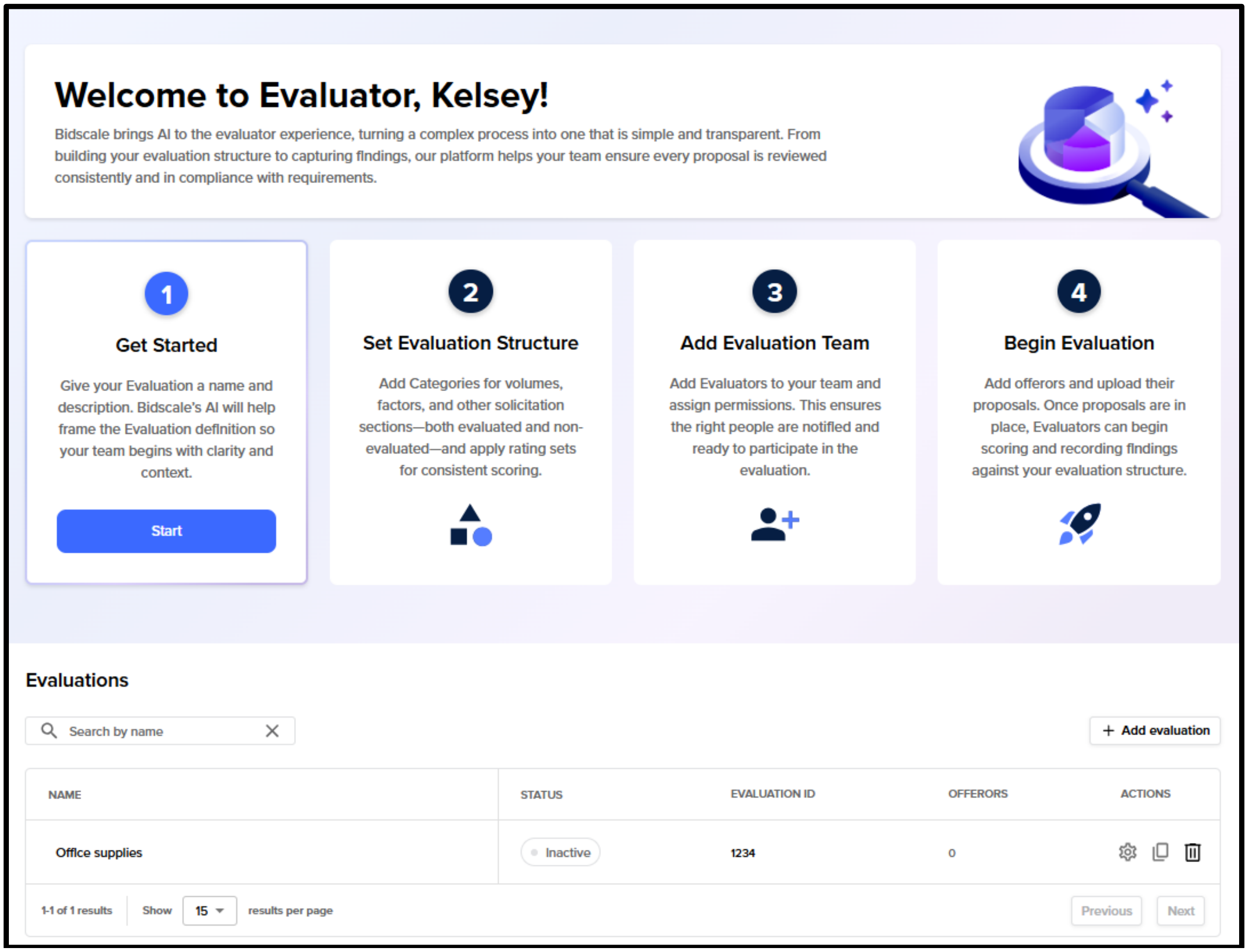

Figure 25: Evaluations page – here you can view and open all Evaluations you have access, to as well as create and configure evaluations if you have permission

6.1 Create an Evaluation

Once a solicitation is ready for review, **Admin users** can begin the evaluation process from the **Evaluations** tab by selecting **Start** in the **Get Started** tile on the Evaluation home page.

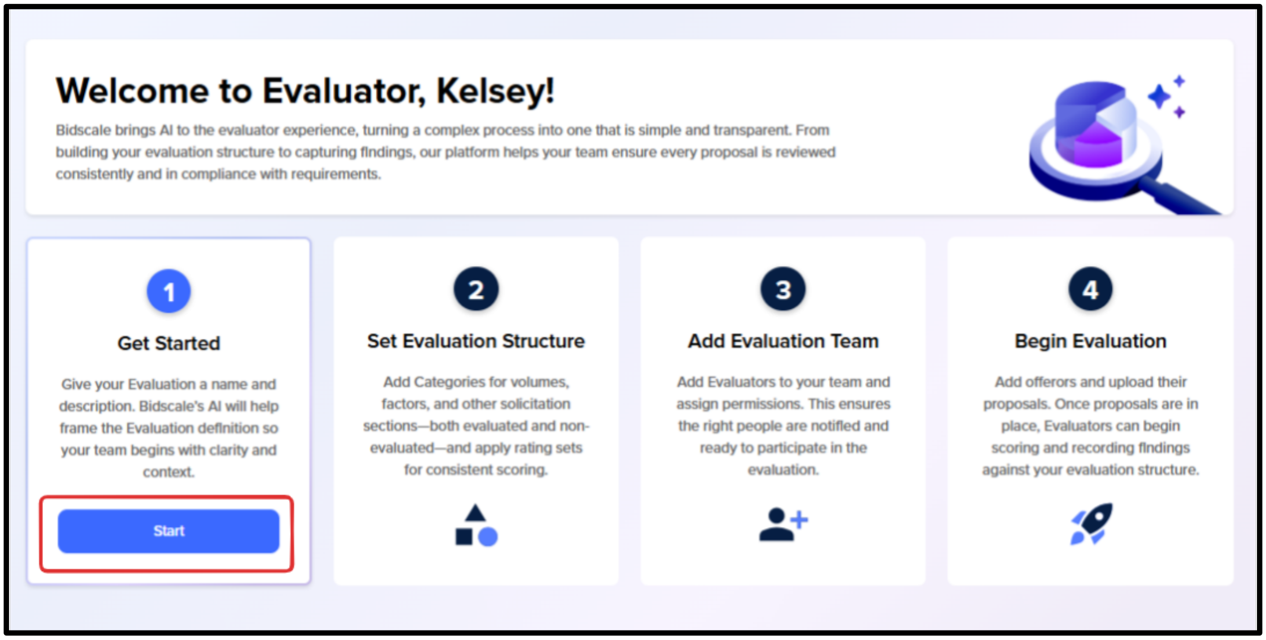

Figure 26: Start button on the Evaluations page

⚠️ *Important:* Only users with the Admin role can create an Evaluation.

The **Evaluation** creation process includes the following steps detailed in the sections below.

6.1.1 Step 1: Name and Describe Evaluation

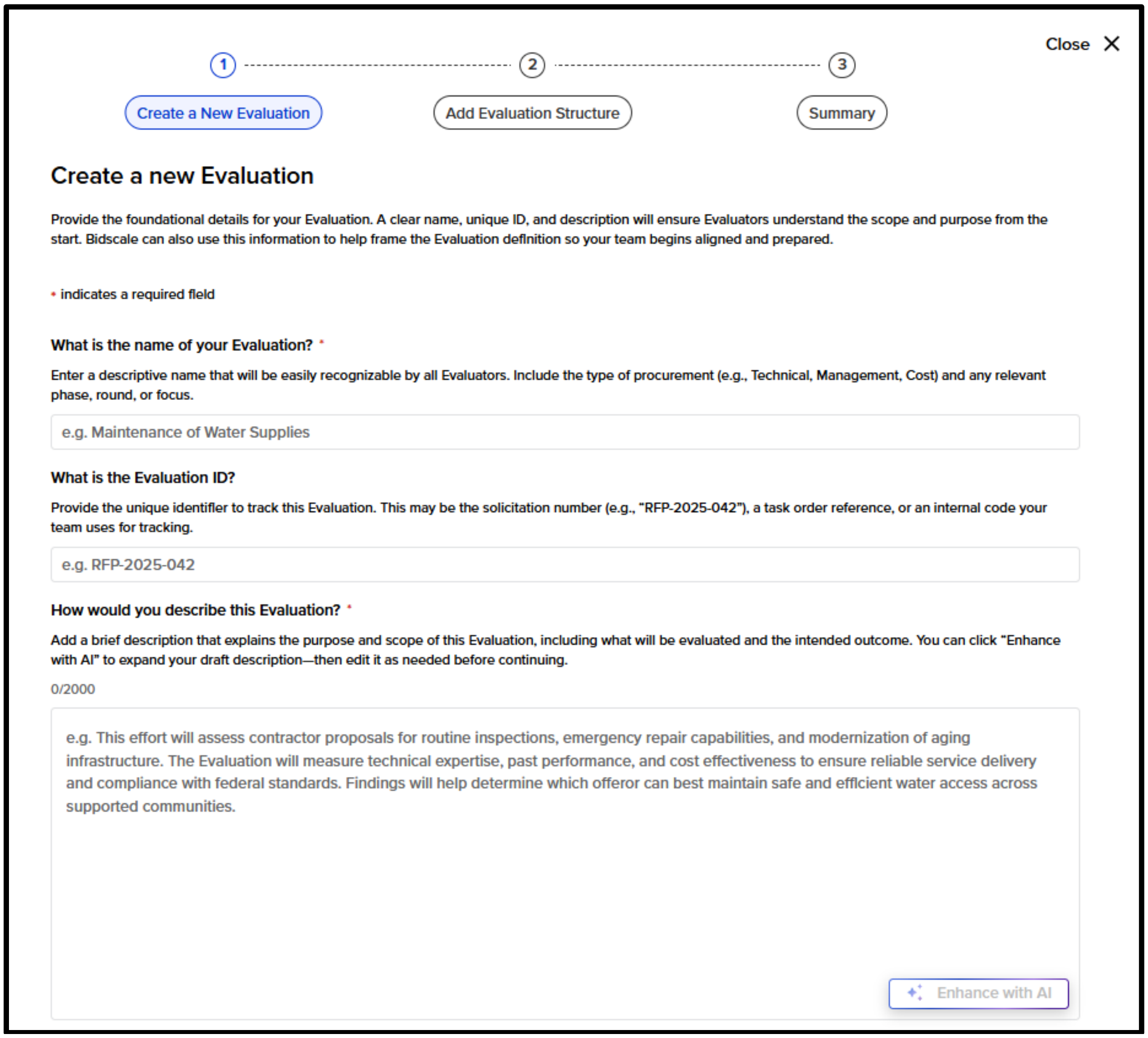

Figure 27: Evaluation creation step 1

Step 1 of Evaluation creation collects key foundational details that define and identify the Evaluation. Users are prompted to provide an **Evaluation name**, a unique **Evaluation ID** (such as an RFP or task order number), and a clear description outlining the purpose, scope, and evaluation criteria. The page includes example placeholder text to help users understand the expected input format. Additionally, users can click **Enhance with AI** to automatically expand or refine their draft description. Once this information is completed, users can proceed to the next stage—adding the Evaluation structure—by clicking **Continue** at the bottom of the page.

6.1.2 Step 2: Evaluation Structure

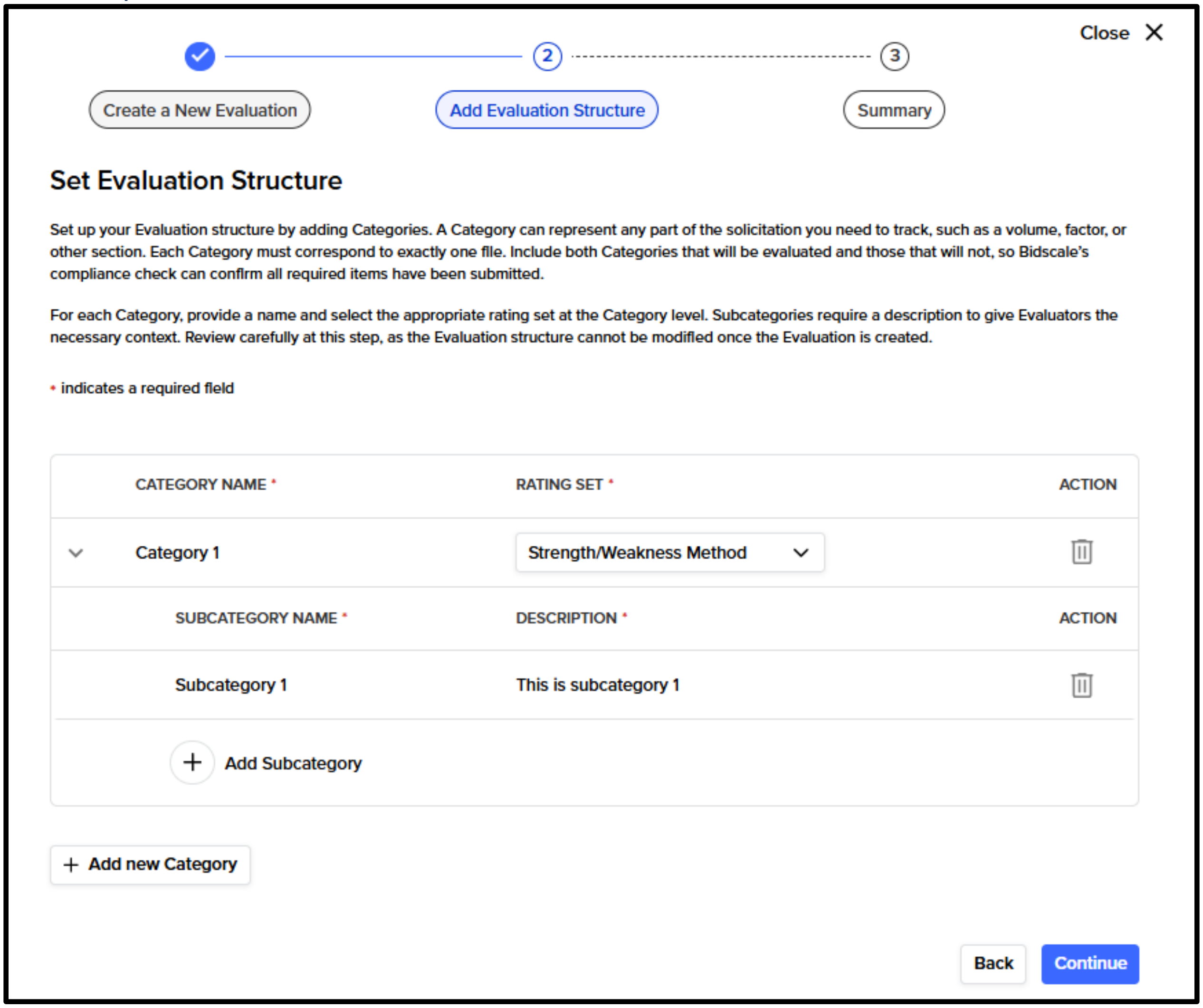

Figure 28: Add Evaluation Structure Step 2

In step 2 of Evaluation creation you will setup your evaluation structure. You can add **Categories** and **Subcategories** as needed along with an assigned **Rating Set** for each **Category**. You can also delete **Categories** and **Subcategories,** but at least one Category and Subcategory are required per Evaluation.

⚠ *Important:* **Rating Sets** are configured by an Administrator. If you need a new rating set specific to your evaluation it should be configured prior to Evaluation creation.

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6.1.2 Step 3: Summary

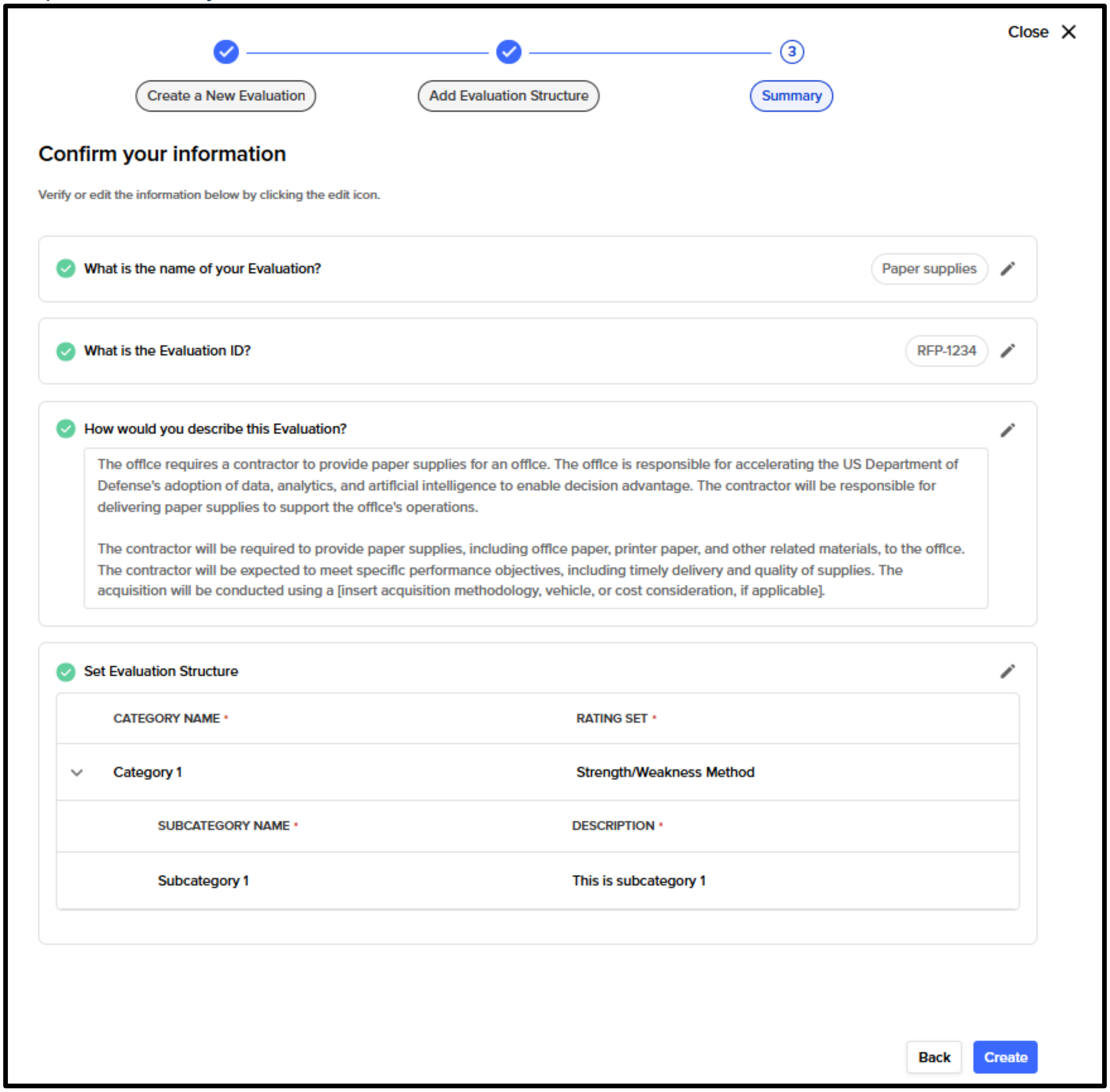

Figure 29: Summary of evaluation setup step 3

Once all Evaluation creation steps are completed, a summary page of selections will be displayed. Review the summarized items and make any final edits as necessary by selecting the **Edit pen** icon in any section. Once you have completed your review, select the **Create button** to navigate to the new Evaluation's **Overview** tab.

6.2 Evaluation Management

To manage the evaluation itself, click on the **Evaluation Name** on the Evaluations page or open it from your **active Evaluations** on the **Home page**. The first tasks that will display upon evaluation creation are the **Add Evaluation Team** and **Add Offerors** tasks if you are a Full Access user. When you select the **Add** button in the task you will be navigated to the relevant action.

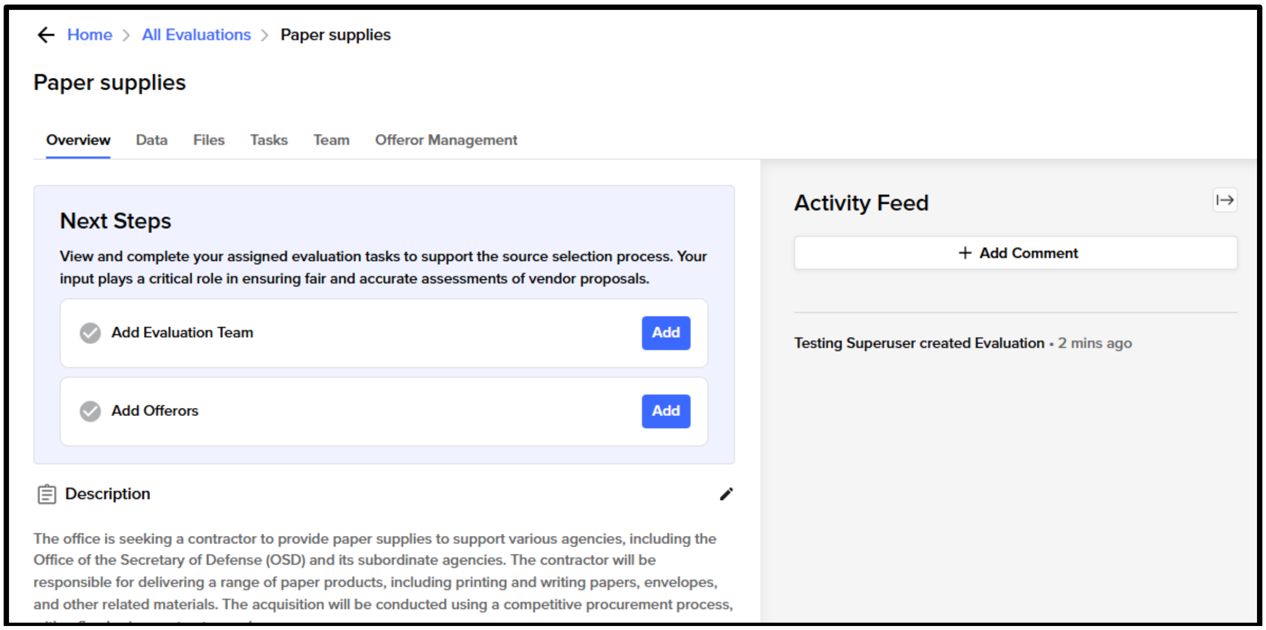

Figure 30: Overview tab and details of an Evaluation

6.2.1 Activating the Evaluation

Once setup is complete, the evaluation remains **inactive** until at least one offeror is added on the **Offeror Management** tab (see details for adding an Offeror in section 6.8) and one of their evaluations has begun.

- **Proposal documents** (PDFs or video files) are uploaded per offeror on the **Offeror Management** tab and aligned to the appropriate categories
- Tasks will not display on the evaluation until at least one offeror is added and **Begin evaluation** is selected on the Offeror Management tab (see Offeror details in the Data tab section 6.8)
- When you select **Begin evaluation** on any offeror the Evaluation is **automatically activated**

6.2.2 Assigning Roles and Access

At this stage, roles are assigned via the **Team** tab (see details in the Team section below):

- Users with the Permission level **Full Access** can assign due dates, manage/view all offerors, generate reports, and manage evaluation progress.
- Users with the Permission level **As Assigned** gain access to their assigned Categories, evaluation tasks, and specified offeror reference files as applicable.

The below sections will outline the detailed actions within each evaluation tab.

6.3 Overview

The **Overview** tab is where you will land first when opening an Evaluation. On this tab you will see all of your current tasks in the blue **Next Steps** box at the top of the page. Depending on your permission level and whether or not evaluation tasks have been kicked off you may or may not have tasks in the **Next Steps** box. This tab also displays the Evaluation **description** and the Evaluation **Activity Feed**. The **Activity Feed** shows all actions that have been taken on the Evaluation and allows you add additional comments via the **Add Comment** button.

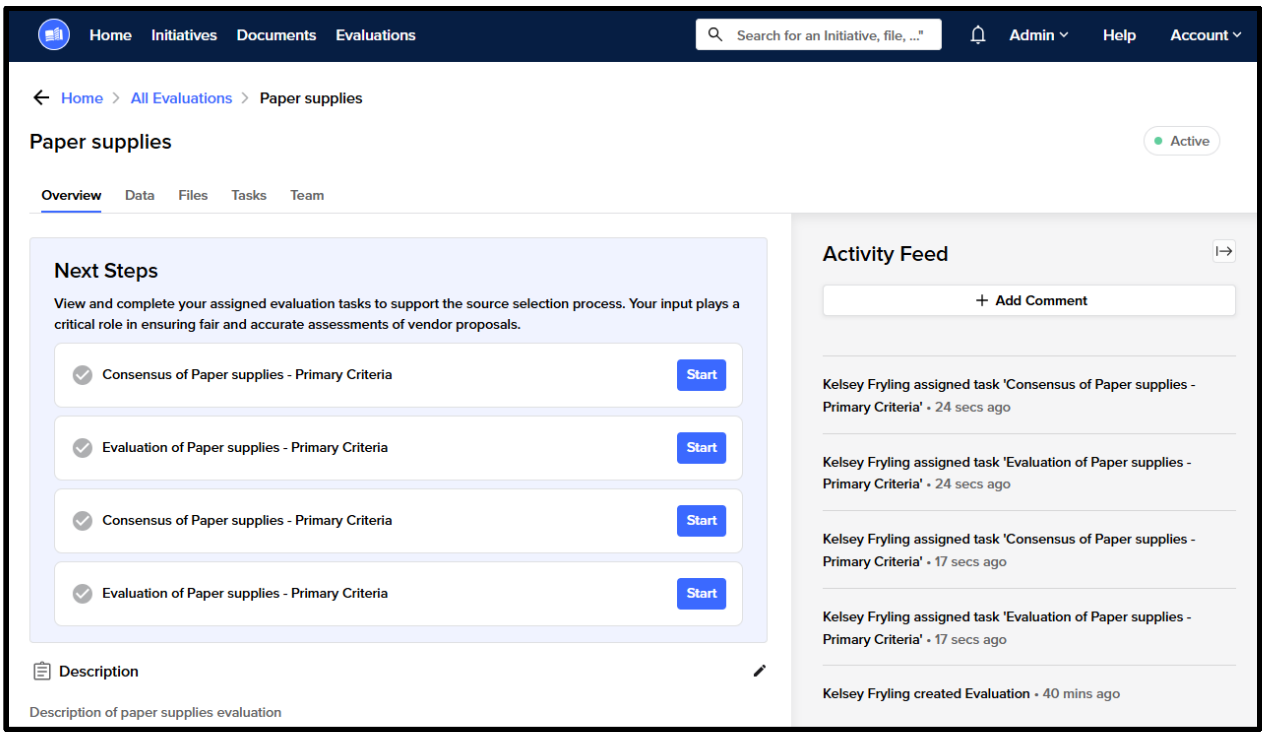

Figure 31: Overview tab of an Evaluation

6.3.1 My Tasks

From the Bidscale **Home page**, you'll see all **active evaluations** and the **total number of tasks** assigned to you. You can open an individual task from the **Overview** tab of an Evaluation via the **Start** button.

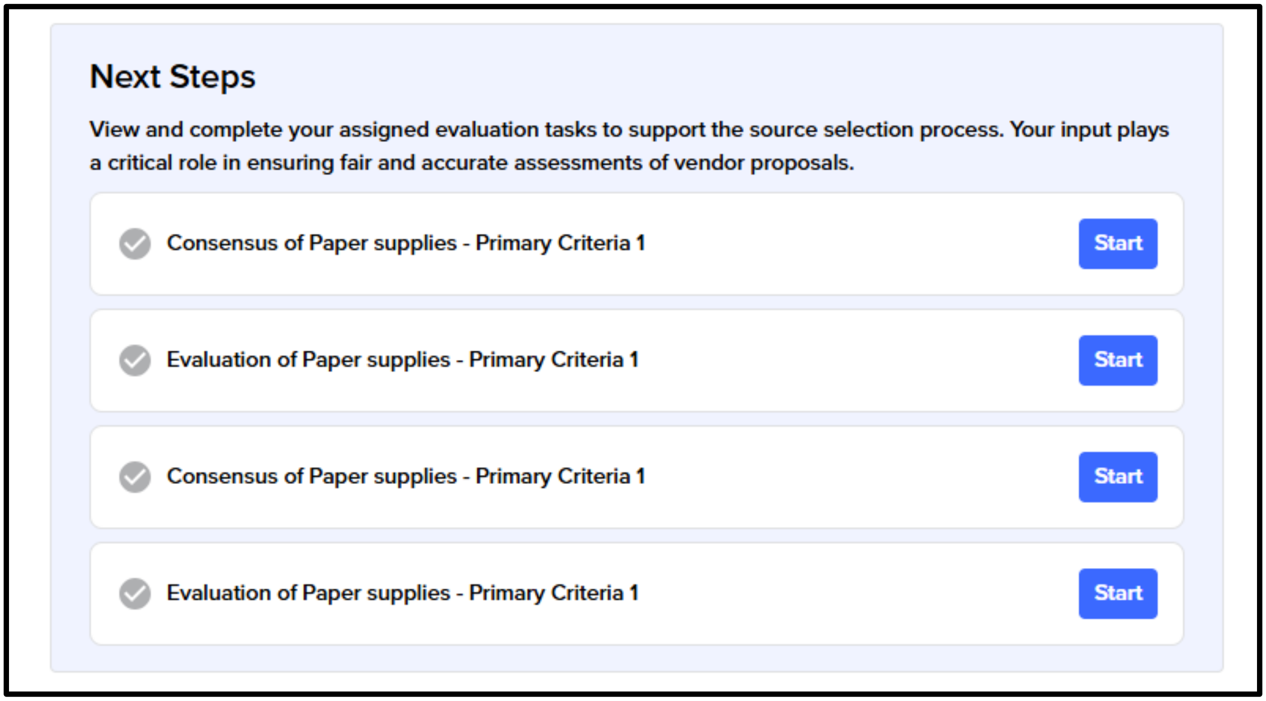

Figure 32: Tasks in the Next Steps box on the Overview tab

⚠️ *Warning:* When you open a task, it will launch in a new browser tab. You must **acknowledge the user agreement** before proceeding.

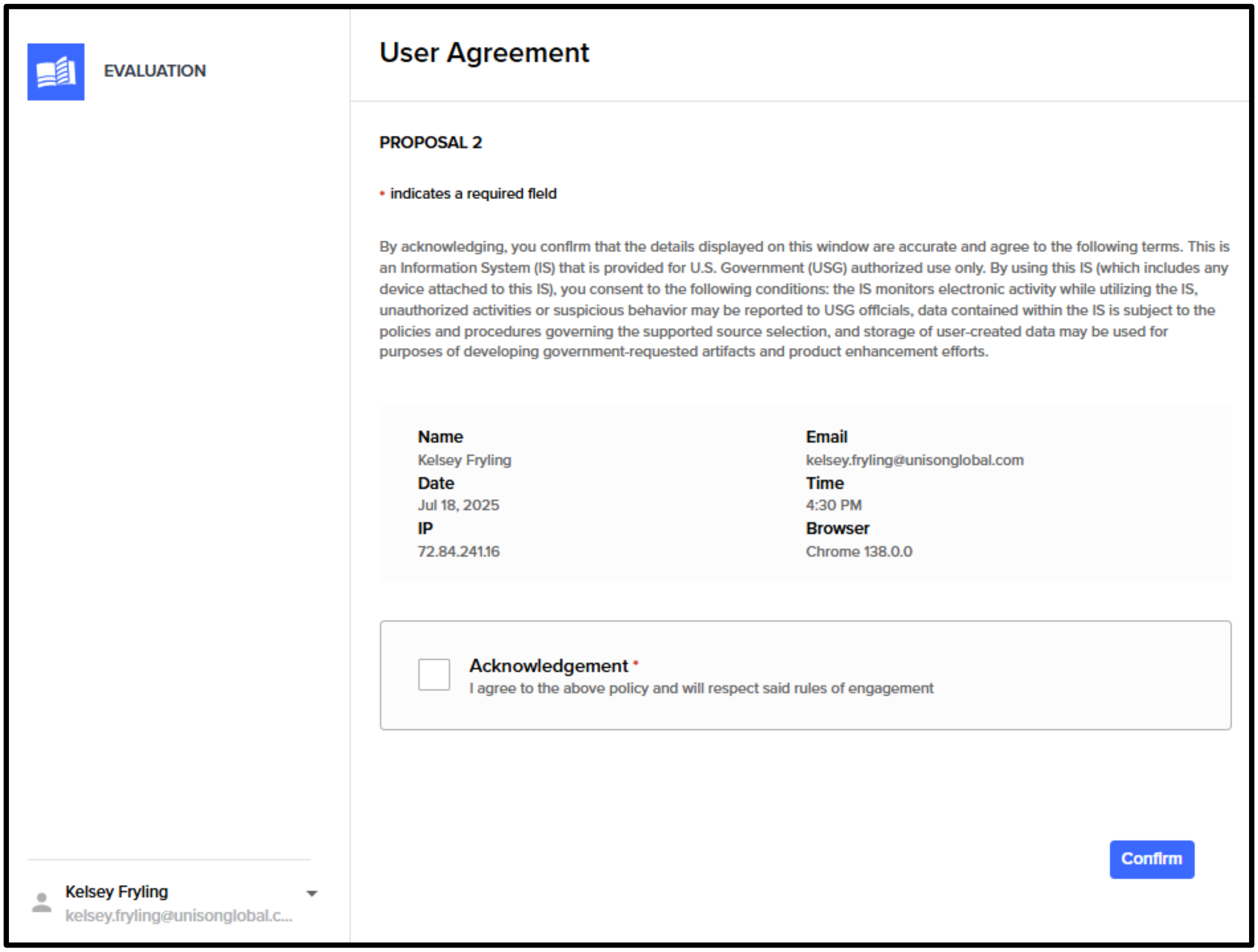

Figure 33: User Agreement acknowledgement when opening a task.

Uploaded files can be **either documents or videos** and the evaluation process differs for each.

Document Evaluation Tasks

To begin a document evaluation task, select the **Start button** any document **task row** in the **Next Steps** section of the **Overview** tab and **acknowledge the user agreement** in the new window.

Add Findings from the Proposal Tab

You can create two types of findings:

- **With annotations** (linked to highlighted content)
- **Without annotations** (not linked to specific content in the document)

Both can be added from within the task tab or the workspace. After adding a new finding, Bidscale will automatically evaluate the quality of the comment and provide feedback via **AI Feedback** columns on the **Workspace** tab. The **AI Feedback** column will provide real-time suggestions to strengthen clarity, tone, and completeness. This ensures evaluation comments are actionable and aligned with best practices.

Add Manual Findings with Annotations

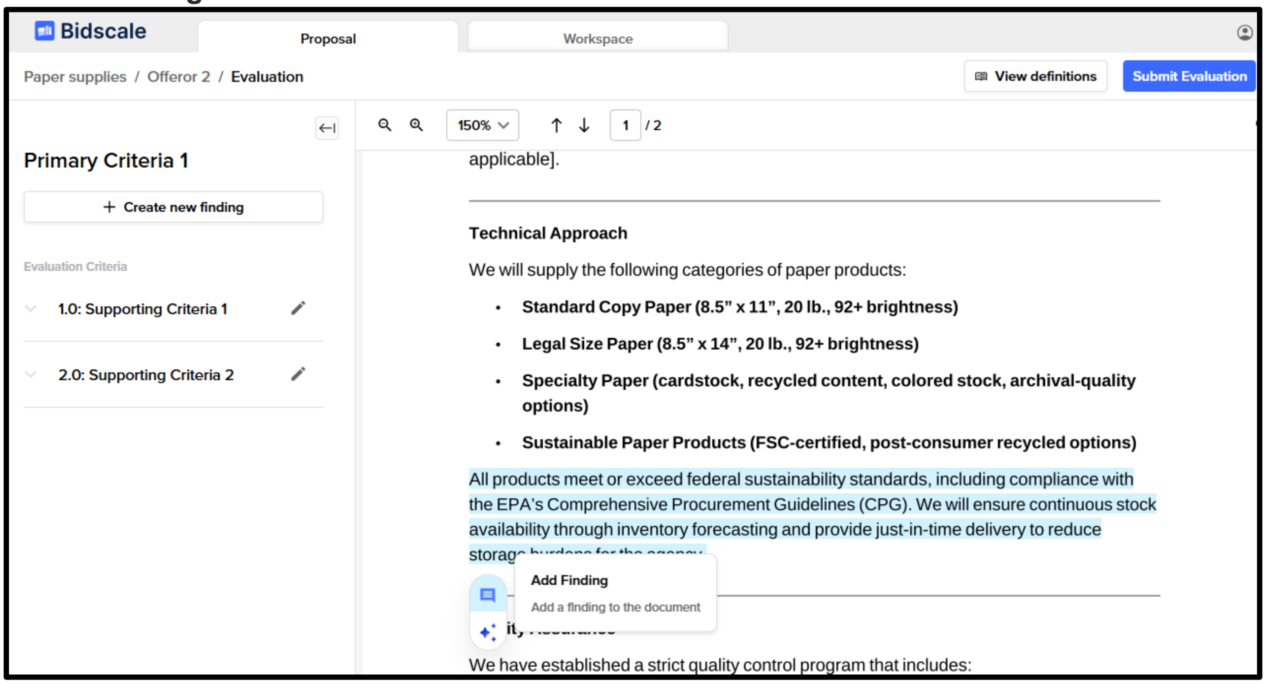

Figure 34: Adding a manual finding with Annotation

To add a finding tied to specific content in the document:

1. **Highlight** the relevant text on the Proposal tab.
2. Select **Add Finding** (it will appear below your selected text).
3. In the **Finding Editor**, review the Evaluation Criteria definitions if needed.
4. Select the applicable **Evaluation Criteria**.

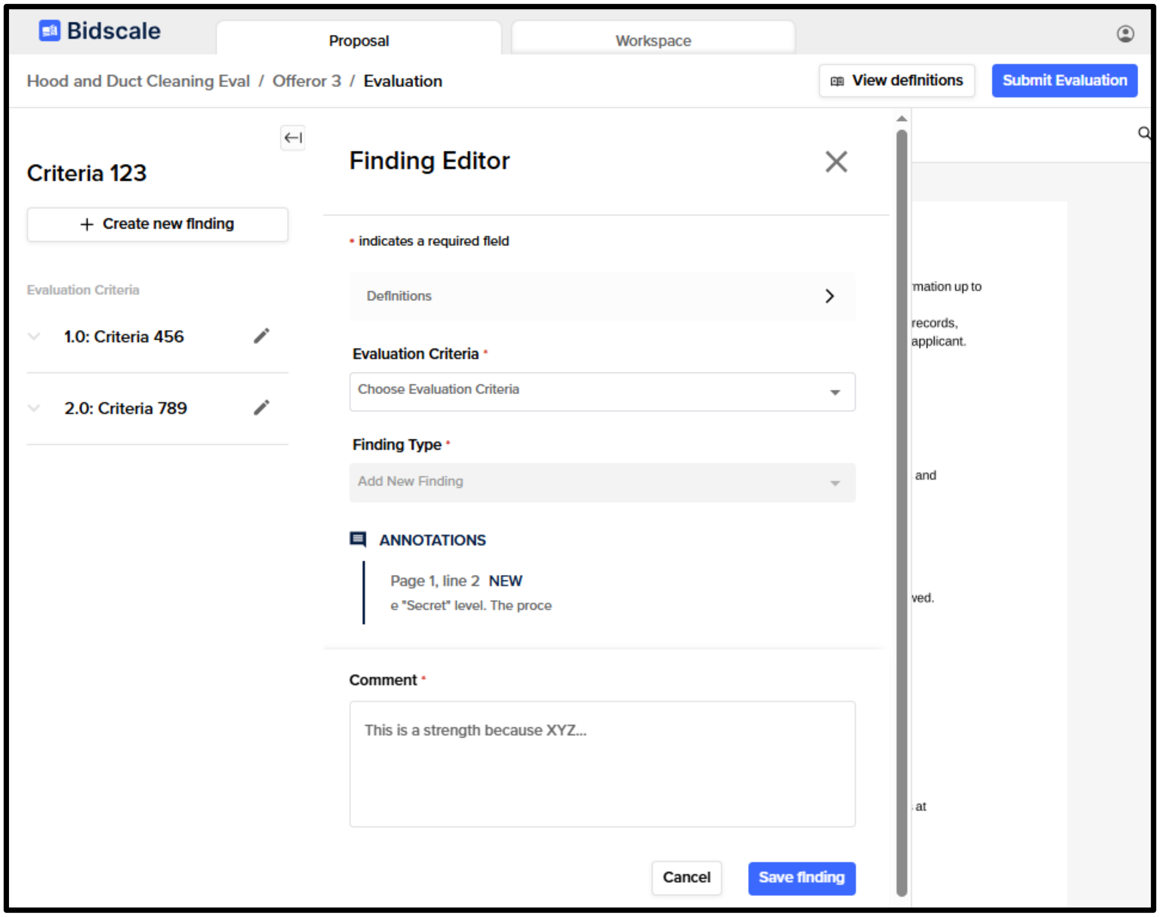

Figure 35: Finding Editor with annotation

5. Choose either of the two options in **Finding Type**:
    a. **Existing Finding** (link your annotation to a prior entry), or
    b. Add New Finding
6. Select a **Rate Finding** value.
7. Review the **Annotation(s)** attached to this finding.
8. Add a **Comment**.
9. Select **Save finding**.

Your saved findings will appear in the **left panel**, organized by evaluation criteria.

Add AI Findings with Annotations

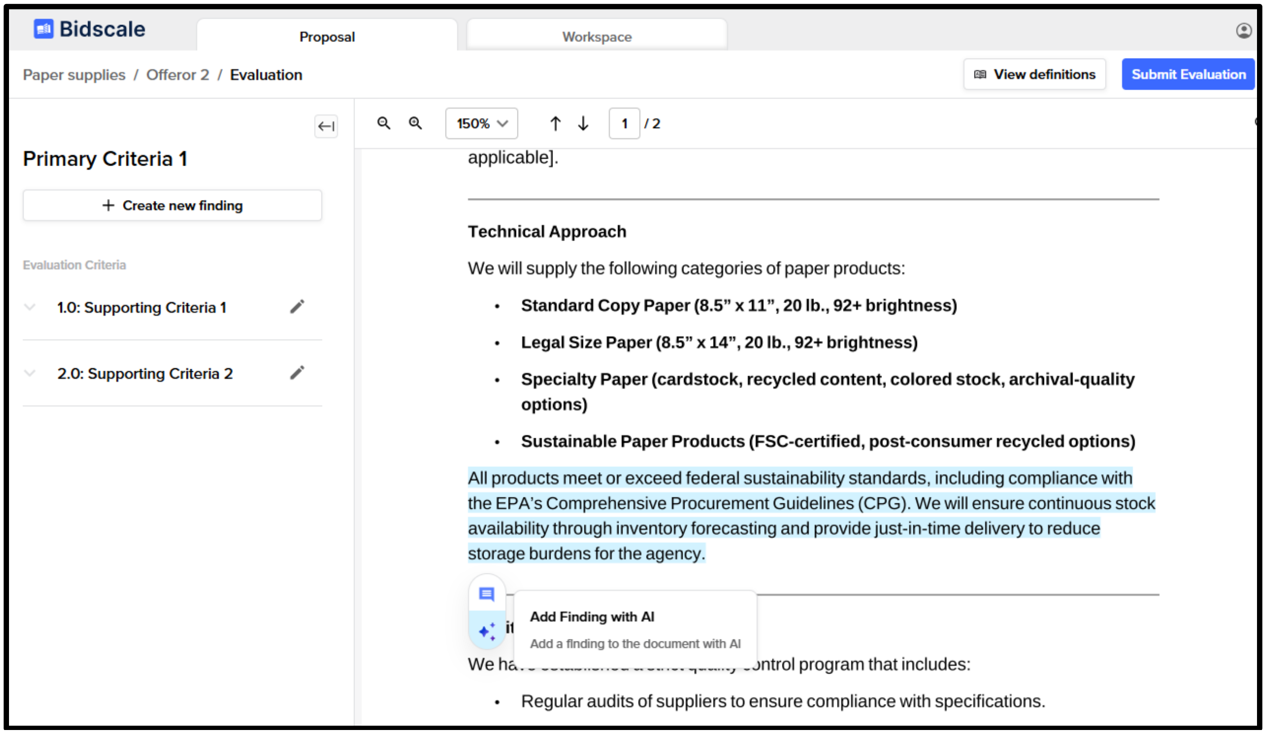

Figure 36: Adding an AI finding with Annotation.

To add a finding tied to specific content in the document:

1. **Highlight** the relevant text on the Proposal tab.
2. Select **Add Finding with AI** (it will appear below your selected text).
3. Our AI will take some time to formulate a draft finding with government-appropriate language and structure and then display the **Finding Editor**.
4. In the **Finding Editor**, review the Evaluation Criteria definitions if needed.
5. Review the AI suggested **Evaluation Criteria**.

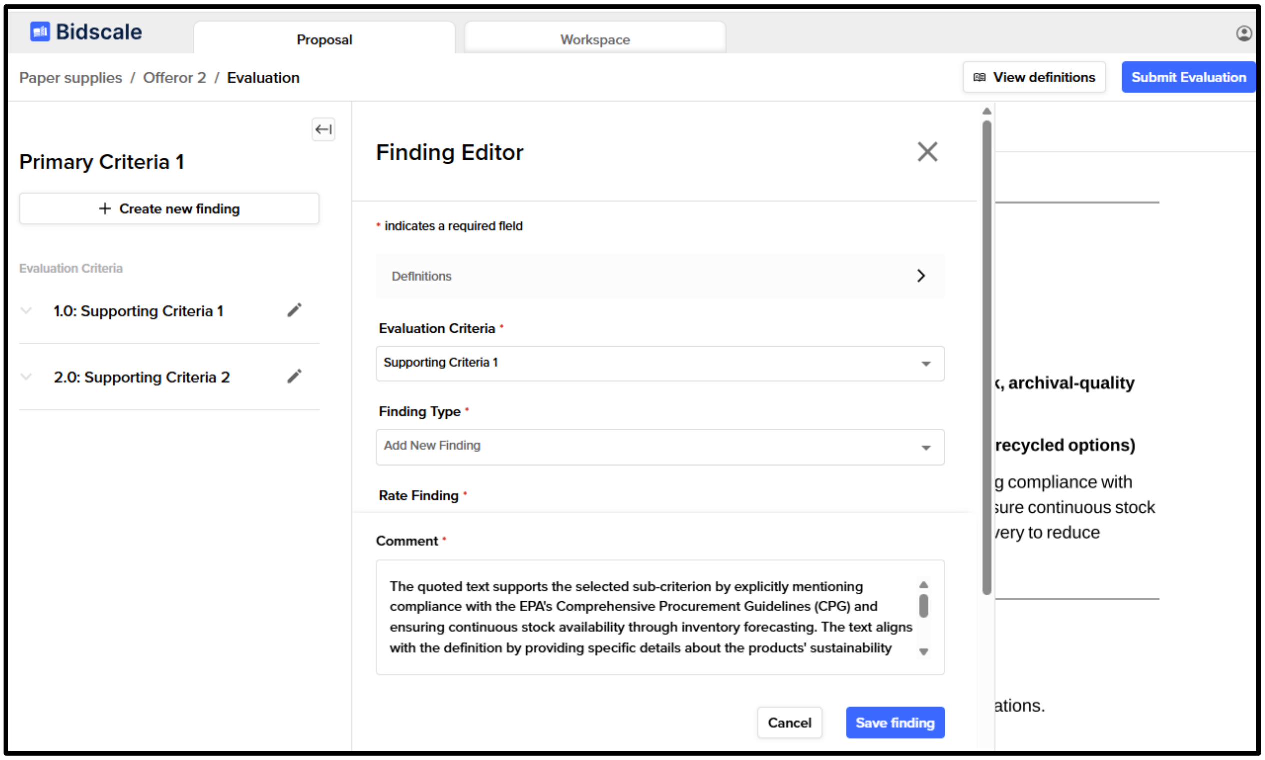

Figure 37: Finding Editor with AI annotation

6. Choose either of the two options in **Finding Type**:
    a. **Existing Finding** (link your annotation to a prior entry), or
    b. Add New Finding
7. Review the AI suggested **Rate Finding** value.
8. Review the **Annotation(s)** attached to this finding.
9. Review the AI generated **Comment** and edit as needed.
10. Select **Save finding**.

Your saved findings will appear in the **left panel**, organized by evaluation criteria.

Add Findings without Annotations

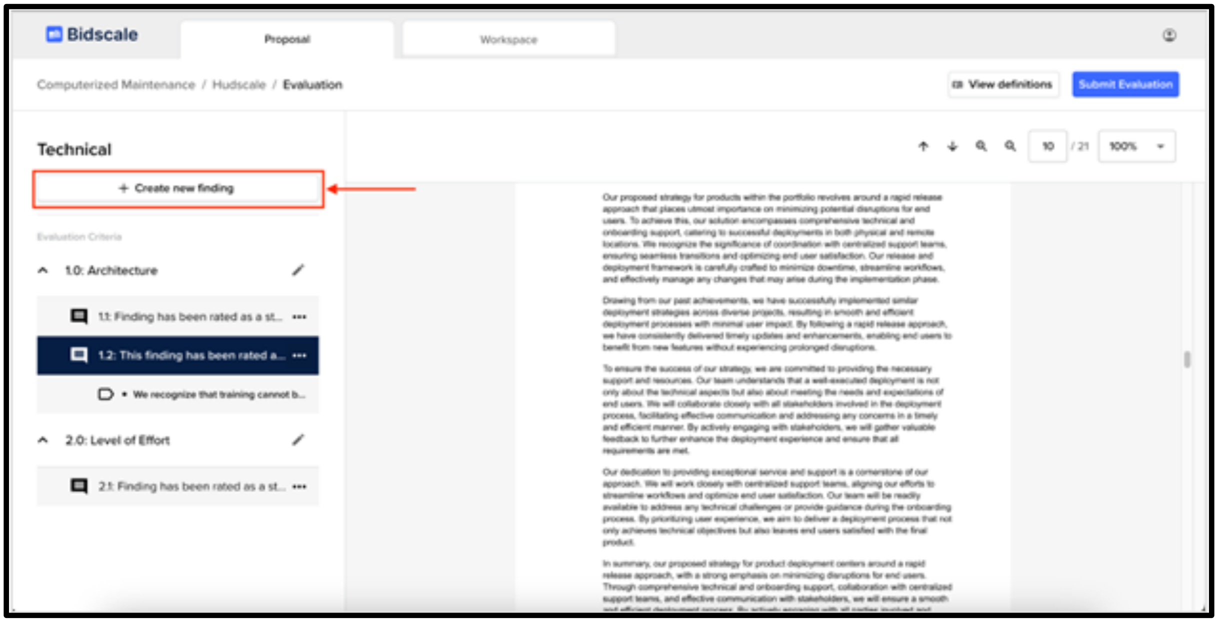

Figure 38: Create a finding without annotation by selecting Create new finding

To create a finding not tied to specific text:

1. From the proposal view select **Create new finding** in the left panel.

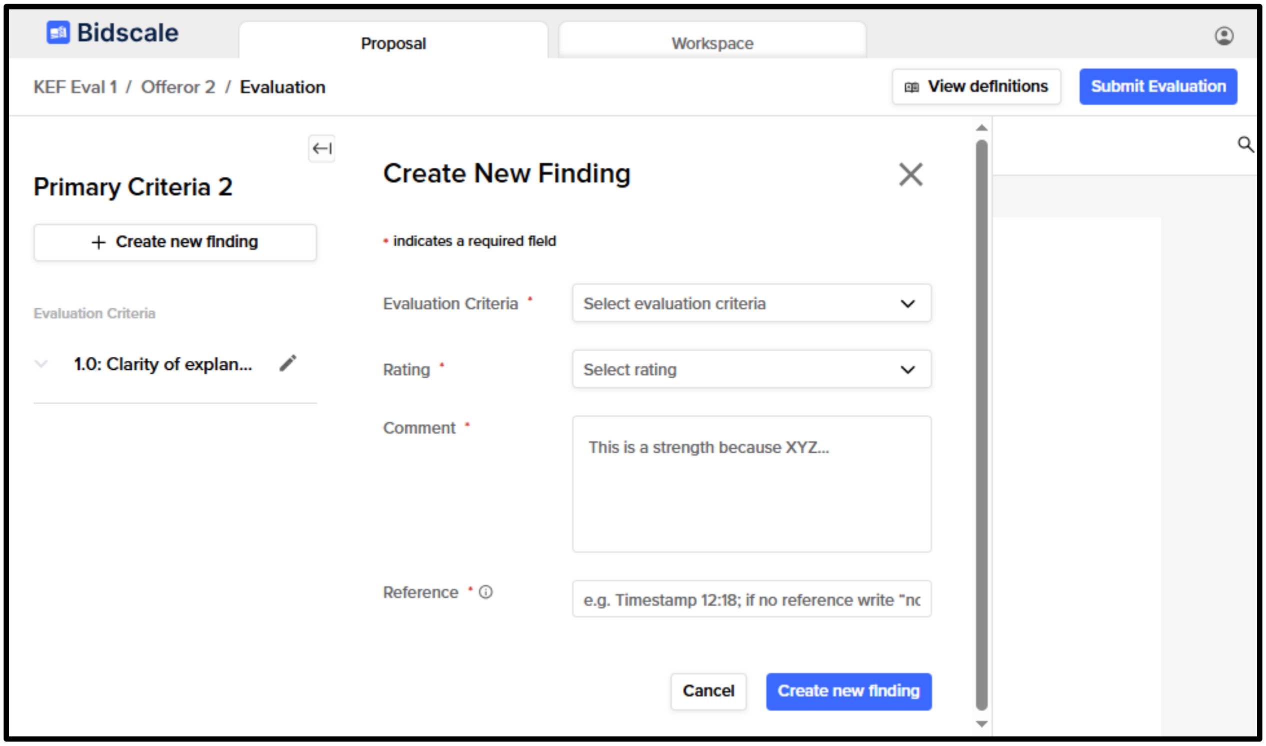

Figure 39: Enter details in the Create New Finding drawer for a finding without annotation

2. Select **Evaluation Criteria**.
3. Select a **Rating**.
4. Add your **Comment**.
5. Enter a **Reference** (required; enter “None” if there is no specific location in the proposal).
6. Select **Create new finding**.

These findings will also appear in the left panel but will not reference specific lines in the proposal.

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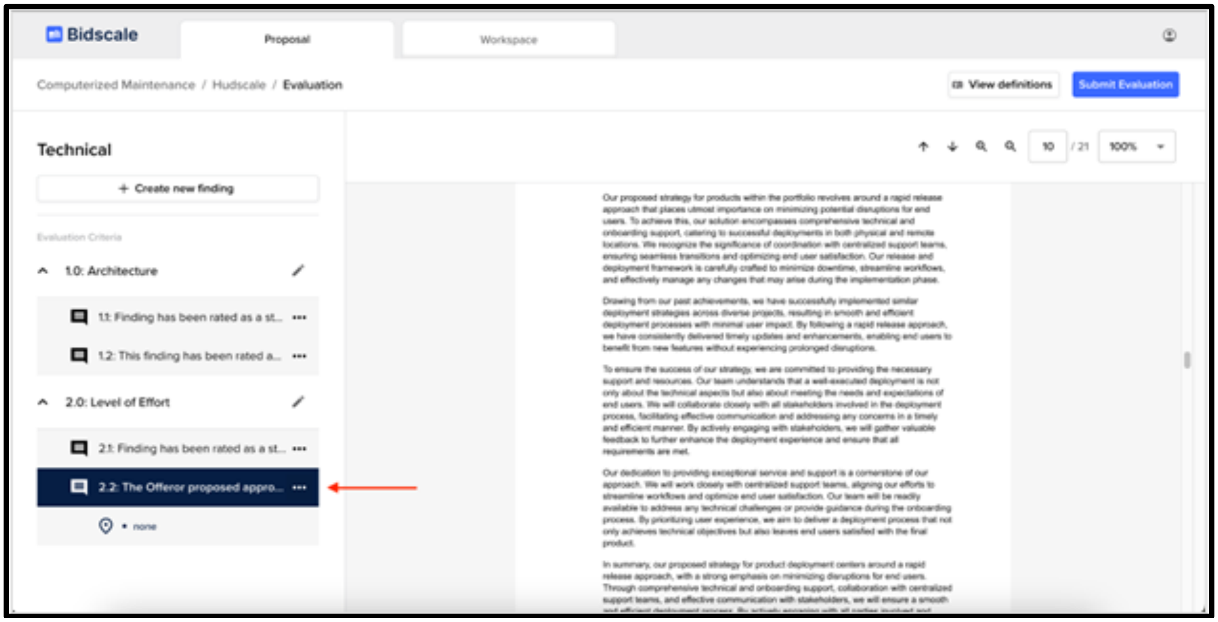

Figure 40: New findings in the Proposal view will display in the left panel under the associated evaluation criteria

Adding Findings from the Workspace Tab

Findings can also be created from the Workspace tab.

To create new findings from Workspace:

1. Open an evaluation or consensus task.
2. Select the **Workspace** tab.
3. Select **Create new finding** next to an evaluation criteria.

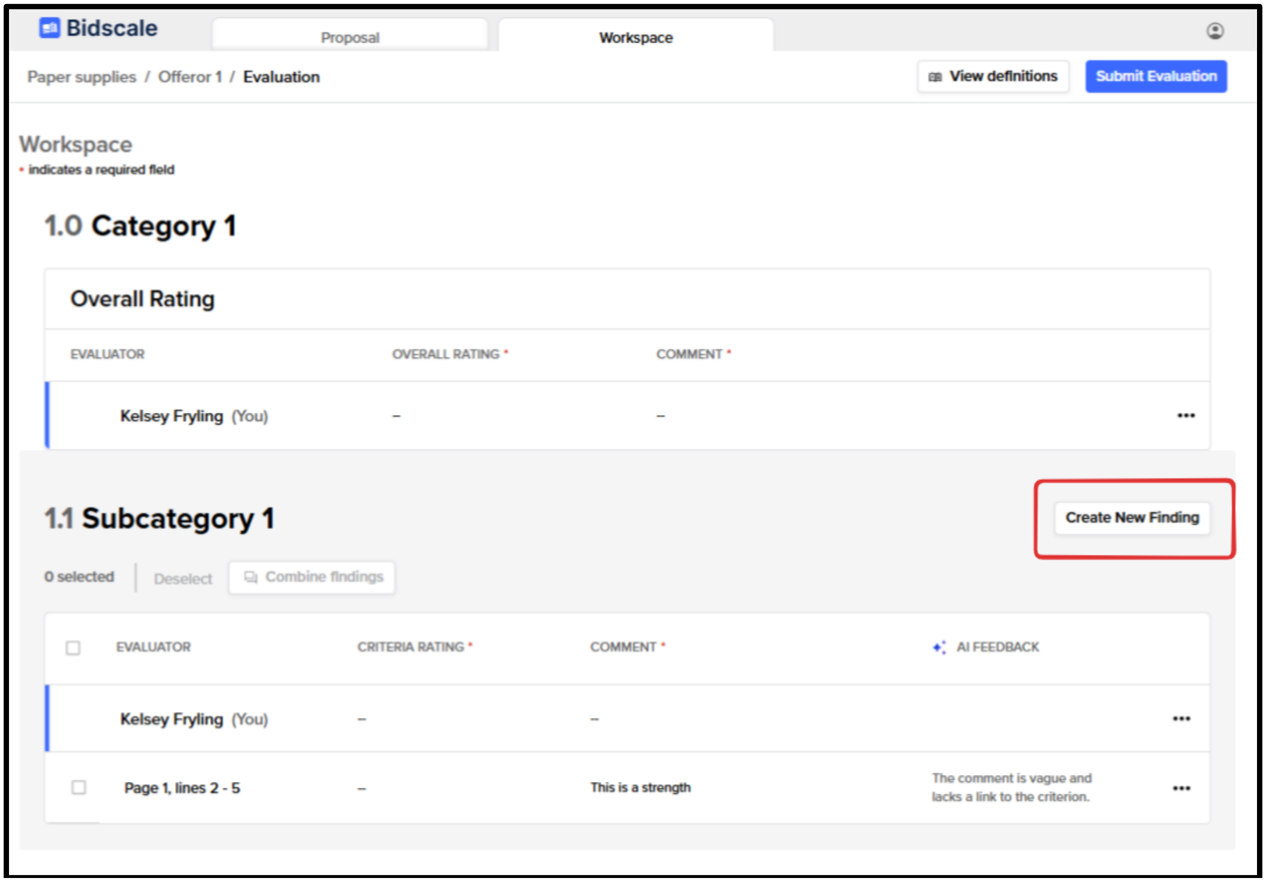

Figure 41: Create a new finding in Workspace view step 1

4. Fill out the required data fields and select **Create new finding**.

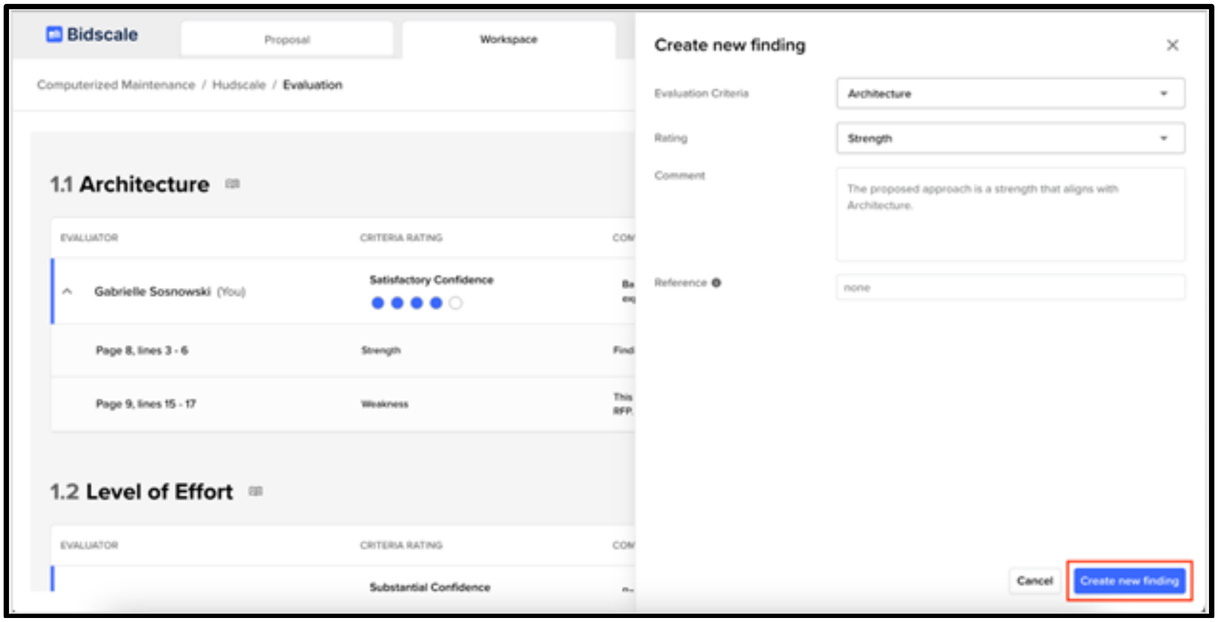

Figure 42: Create new finding in Workspace view step 2

5. View the new finding under the associated evaluation criteria on the tab.

Video Evaluation Tasks

To begin a video evaluation task, select any video **task row** on the My Tasks tab and **acknowledge the user agreement** in the new window.

⚠️ *Warning:* When you open a task, it will launch in a new tab. You must **acknowledge the user agreement** before proceeding.

To create new findings from Proposal view:

1. While viewing the video, pause at any point and select **Create new finding** in the **left panel**.

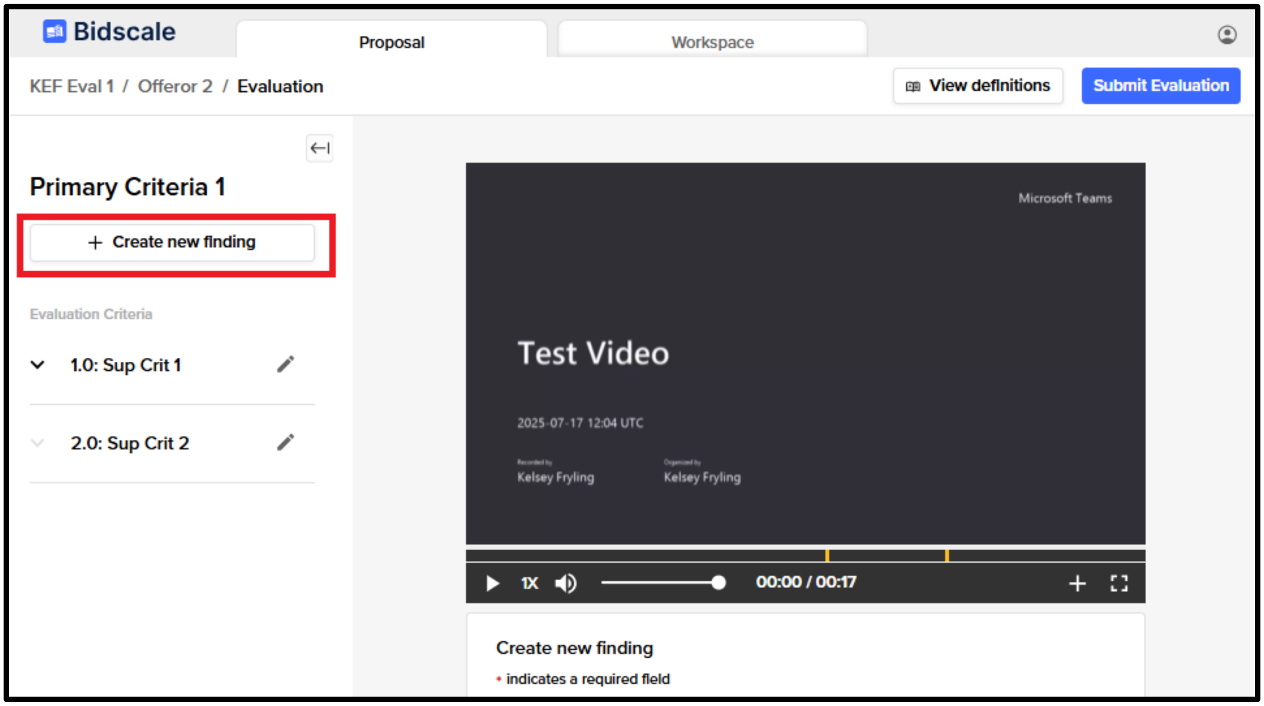

Figure 43: Create a new finding for a video from the Proposal tab

2. This will jump you to the bottom of the right side of the page to the **Create new finding section** below the video and update the timestamp field to your current video location. NOTE: You may also scroll to the **Create new finding** section and manually edit the timestamp.

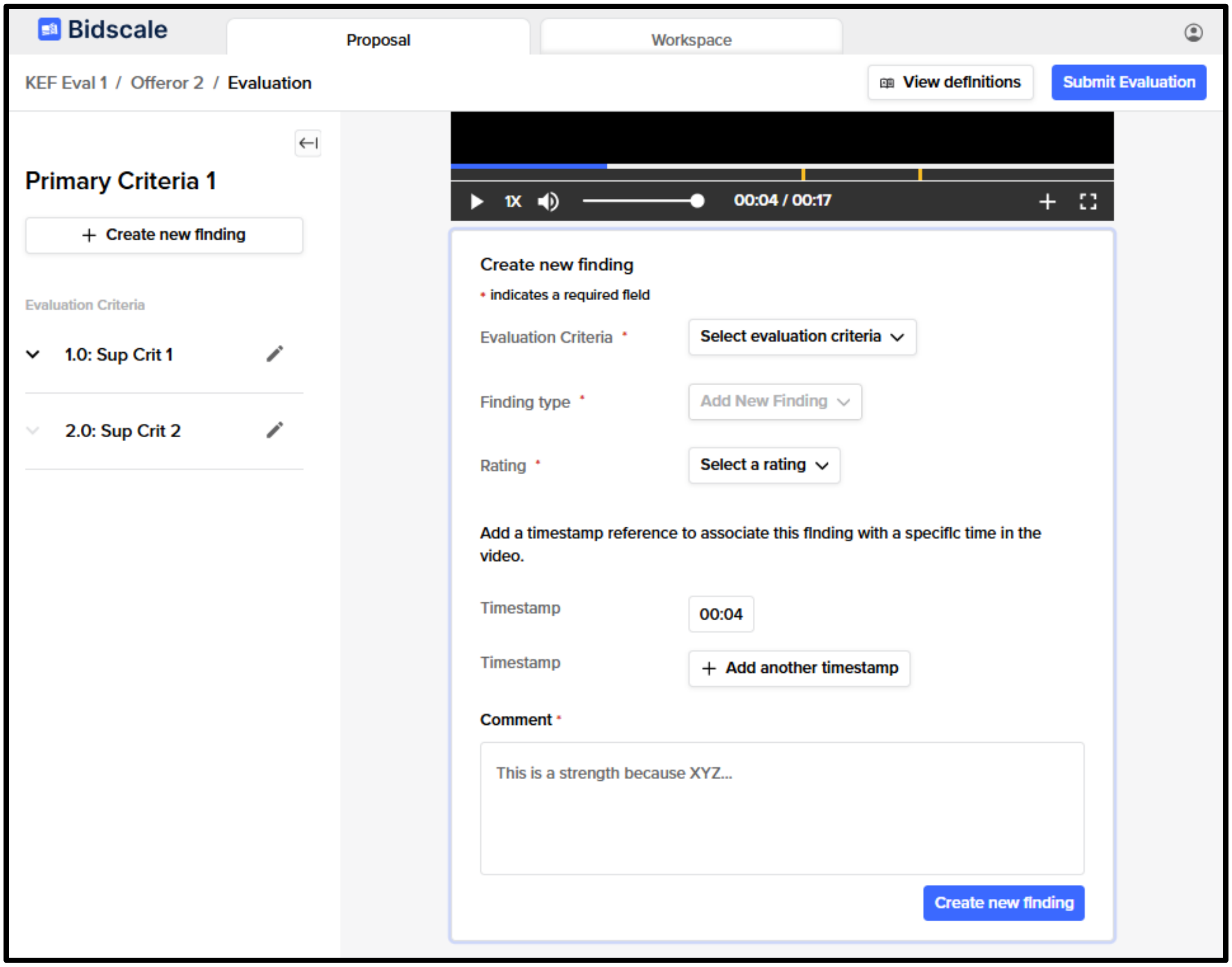

Figure 44: Timestamp logged automatically upon Create new finding button selection – fill out all required fields to create a new finding.

3. In the **Create new finding section** select the applicable **Evaluation Criteria.**
4. Select a **Finding Type**.
    a. **Existing Finding** (link to a prior entry), or
    b. **Add New Finding**
5. Select a **Rating**.
6. Review and edit the **Timestamp** as needed or add an additional timestamp.
7. Add a **Comment**.
8. Select **Create new finding** to save the finding.

Your saved findings will appear in the **left panel**, organized by evaluation criteria.

To create new findings from Workspace view:

1. Select **Create New Finding** for the applicable criteria.

2. A right side page drawer shall open with the same attributes as the **Proposal** tab.
3. Fill out all **required fields**, edit the **timestamp** and/or add additional timestamps.

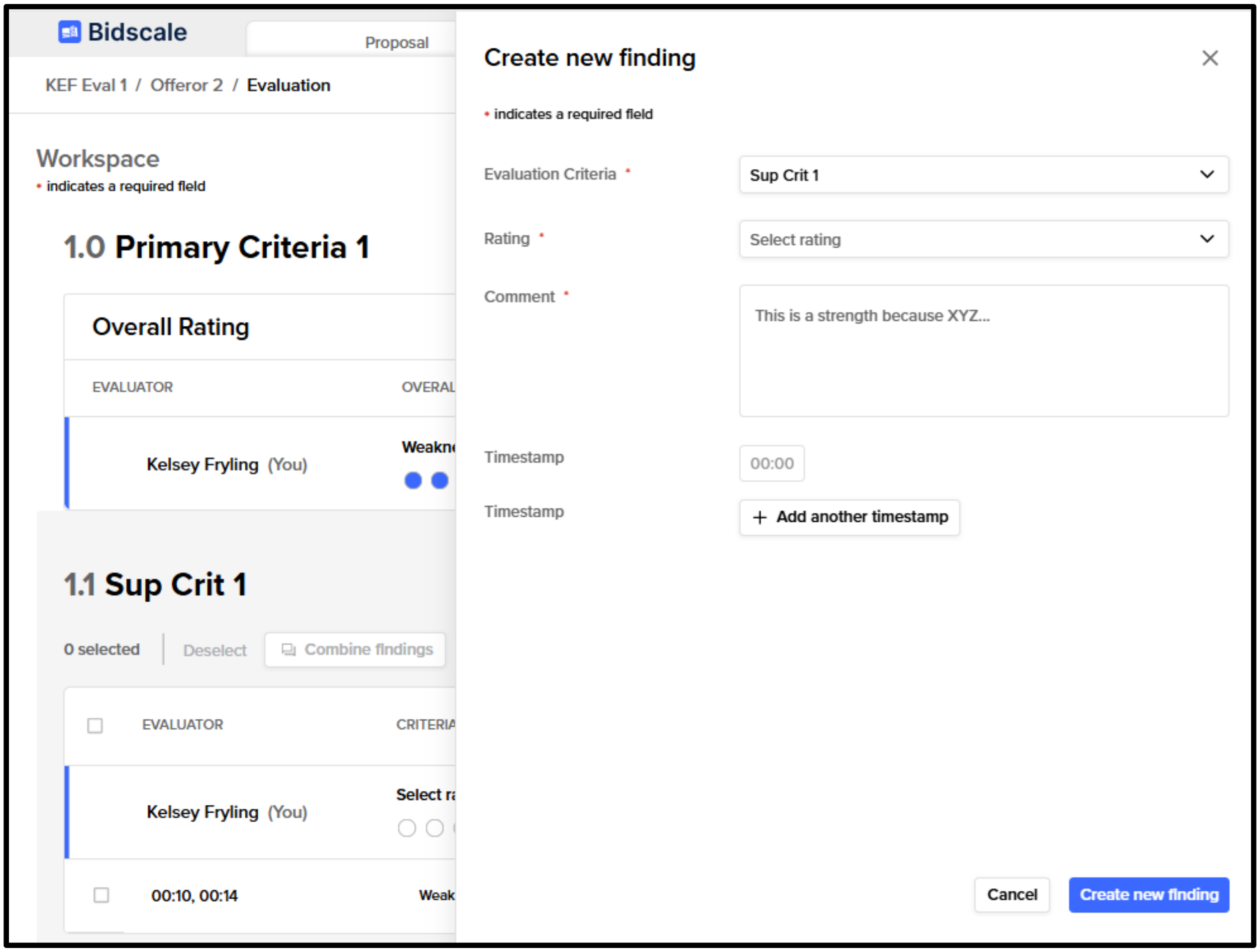

Figure 45: Create a new video finding from the Workspace tab – right side page drawer

4. Select **Create new finding** to create the finding.
5. View the new finding under the associated evaluation criteria on the tab.

Consensus Tasks

Once all evaluations are submitted, the consensus task can be completed. Consensus leads can review all evaluator findings side-by-side, edit justifications, and select which findings are included in the final report. To begin consensus, select the Start button on the Consensus task on the Overview tab and acknowledge the agreement.

Consensus ratings per criterion are added at this stage. Findings can be flagged for discussion or hidden for simplicity during review sessions. Once complete, the consensus task is submitted, and the evaluation is finalized.

As an consensus lead, you will have the ability to add findings in the same way as an Evaluator but will also have the additional ability to request finding revisions and add to consensus. Refer to the section above for finding creation instruction. Consensus tasks findings will also be automatically evaluated on the quality of the finding comment and feedback provided via **AI Feedback** columns on the **Workspace** tab. The **AI Feedback** column will provide real-time suggestions to strengthen clarity, tone, and completeness. This ensures evaluation comments are actionable and aligned with best practices. Additional consensus abilities are outlined below:

Add findings to Consensus Report

1. Open the **Workspace** tab
2. Locate findings under the evaluation criteria
3. Select the **checkbox** next to each finding to add into the report
4. Select **Add to consensus**

You can also select the **ellipsis (…)** on a finding row and select **Add to consensus.**

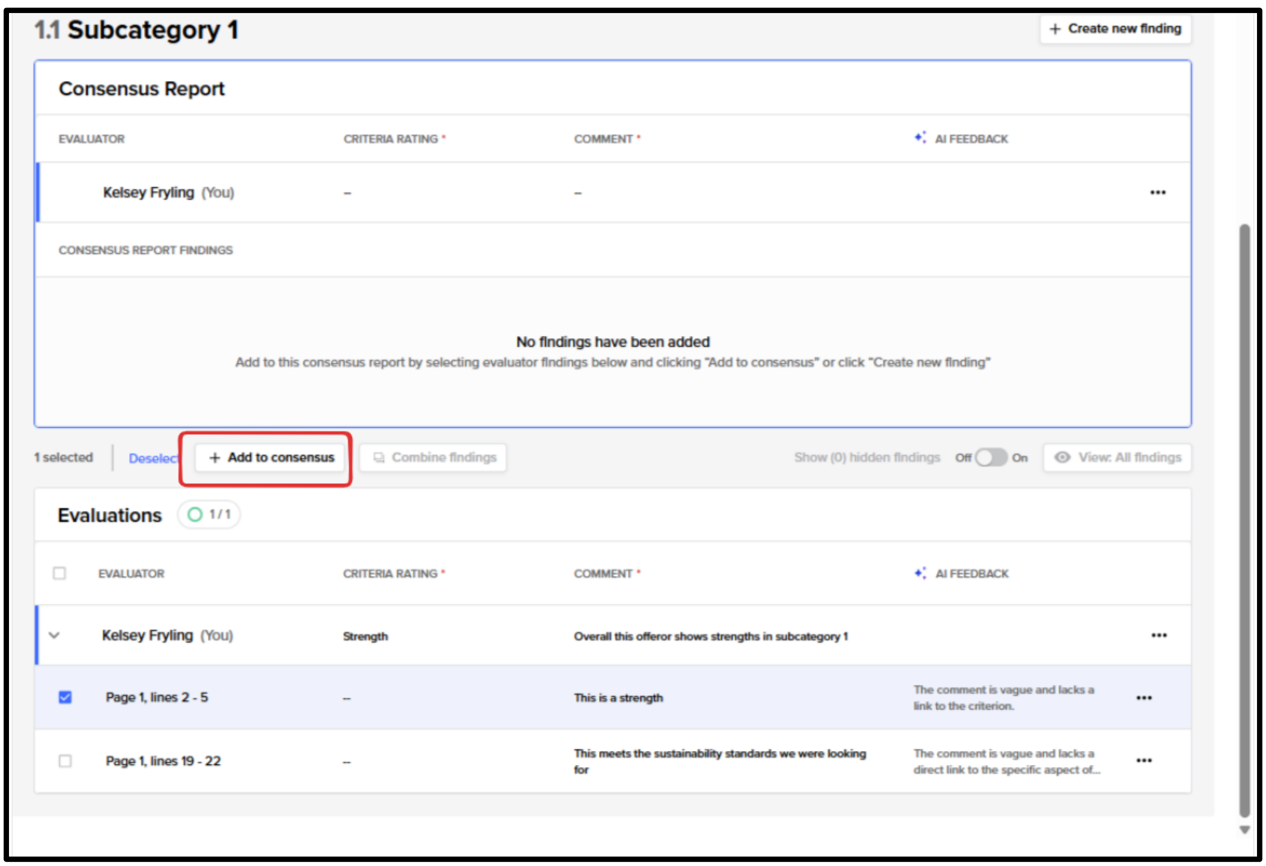

Figure 46: Create new finding in Workspace view

Combine findings

1. Open the **Workspace** tab
2. Locate findings under the evaluation criteria
3. Select the **checkbox** next to 2 or more findings
4. Select **Combine findings**

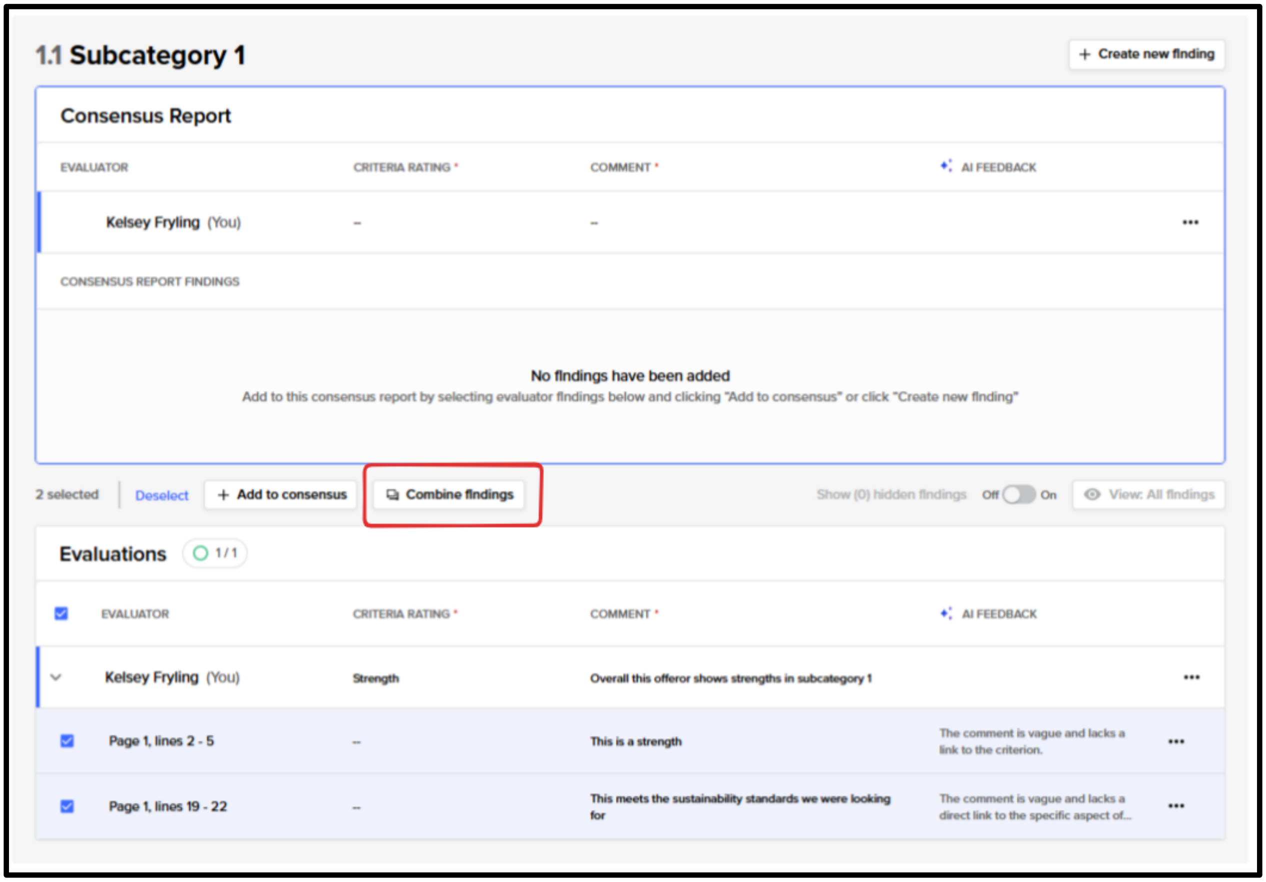

Figure 47: Combine findings in Workspace view

Edit findings

1. Select the ellipsis (**…**) next to a finding
2. Select **Edit**
3. Edit the rating and/or comments
4. Select **Save and add to consensus**

Submitting an Evaluation Task

Once an evaluation is complete, the evaluation can be submitted. Submitting the evaluation will update its Status to Completed.

Submit Evaluation

1. Select **Submit Evaluation** button at the top right of the evaluation.
2. Acknowledge the submission and select **Submit review**.

This pushes a consensus task to the Evaluation Lead (but must be configured to do so)

Submitting a Consensus Task

Once a consensus is complete it can be submitted.

1. Select **Submit** button at the top right of the consensus task.
2. Acknowledge the submission and select **Submit**.

6.4 Data

The **Data** tab within the Evaluation allows you to review and edit **General Information** about the evaluation and review the **Evaluation Structure**.

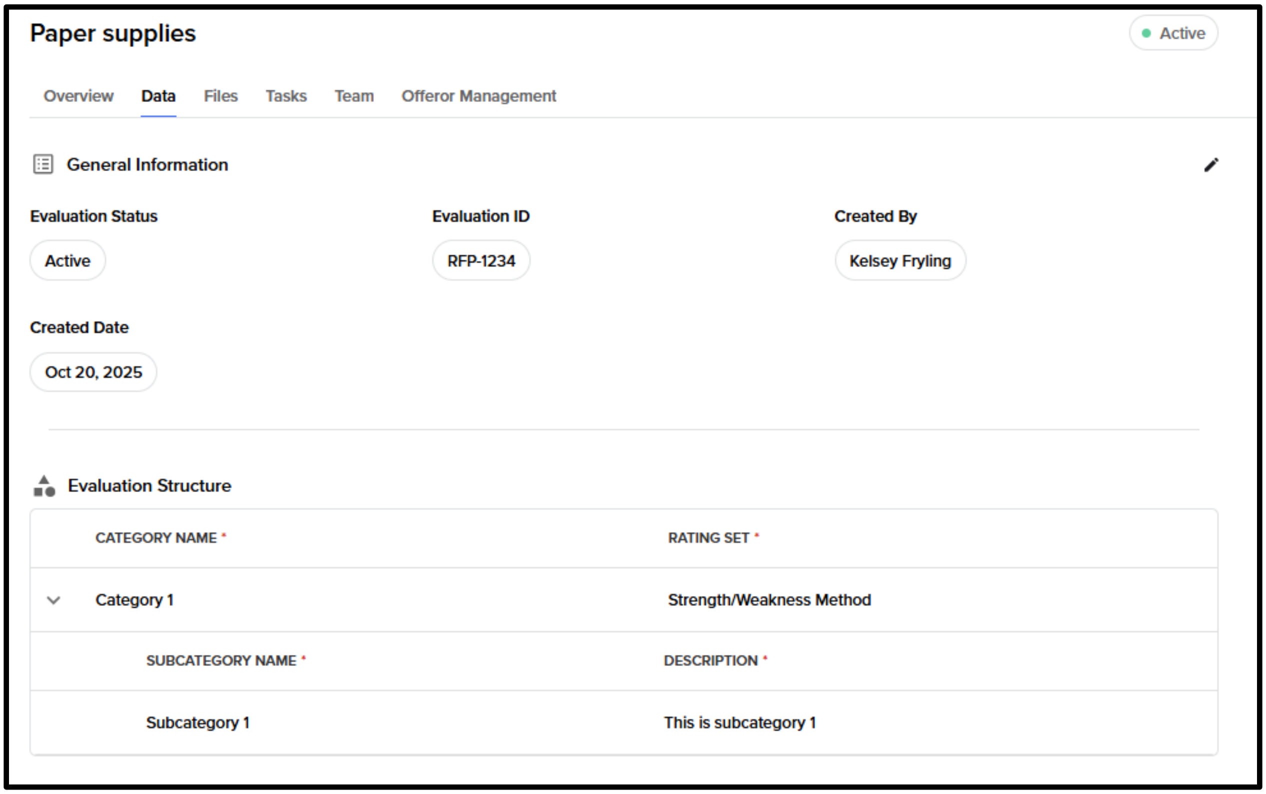

Figure 48: The Data tab within an Evaluation

6.4.1 General Information

The **General Information** section of the Data tab allows you to edit the **Evaluation Status** and **Evaluation ID** fields. Created By and Created Date are read only.

6.4.2 Evaluation Structure

The **Evaluation Structure** displays the categories and subcategories configured at Evaluation creation. This structure cannot be changed.

6.5 Files

The **Files** tab allows for generation and storage of documents related to Evaluation activities that can be referenced as needed. They can be uploaded via the **Upload files** tile or generated via the **Create Evaluation Documents** and **Generate SSEB Report** tiles.

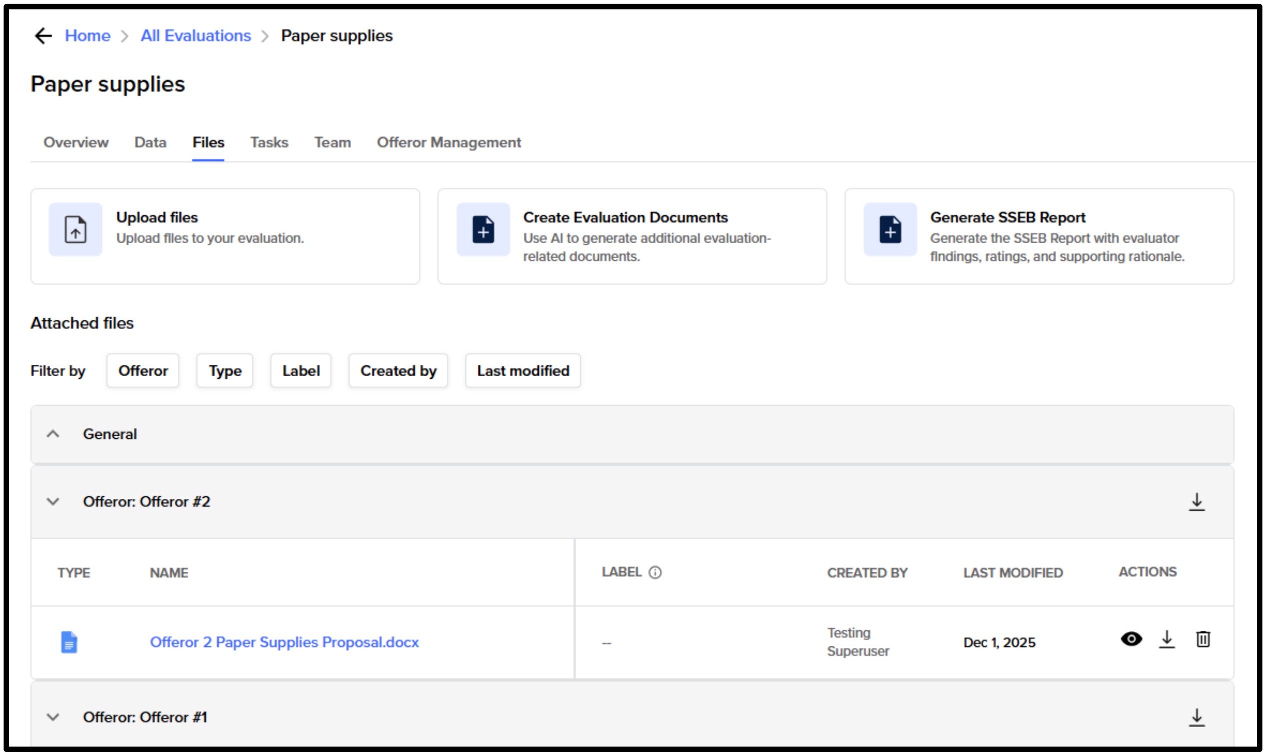

Figure 49: Files tab of an evaluation displaying the General files section and two offeror sections

Files that are specific to each Offeror are displayed in each **Offeror's file section**. Files that are not specific to any Offeror display in the **General** section. Files displayed in an Offeror's section can contain both **Category** files and **reference** files. **Category** files are evaluated via evaluation and consensus tasks while reference files contain additional information such as transcripts, cover pages, etc that are not being officially "evaluated" by a task.
On each file row you can **configure labels**, see **who created** the document, when it was **last modified**, **preview**, and **edit** the document in Writer. Depending on whether the evaluation is has begun there is also a **Delete** action.

⚠️ *Important:* Files can only be deleted from an offeror prior to beginning evaluation tasks. Once an evaluation is kicked off for an offeror more reference files can be uploaded but not removed.

See next section for a broader overview of document automation.

6.4.1 File Upload

File uploads can be done by both **Full Access** and **As Assigned** permissioned users. As Assigned users will only have access to upload reference files to the offerors that they have been granted access to. To upload a reference file, select the **Upload Files** tile on the Files page.

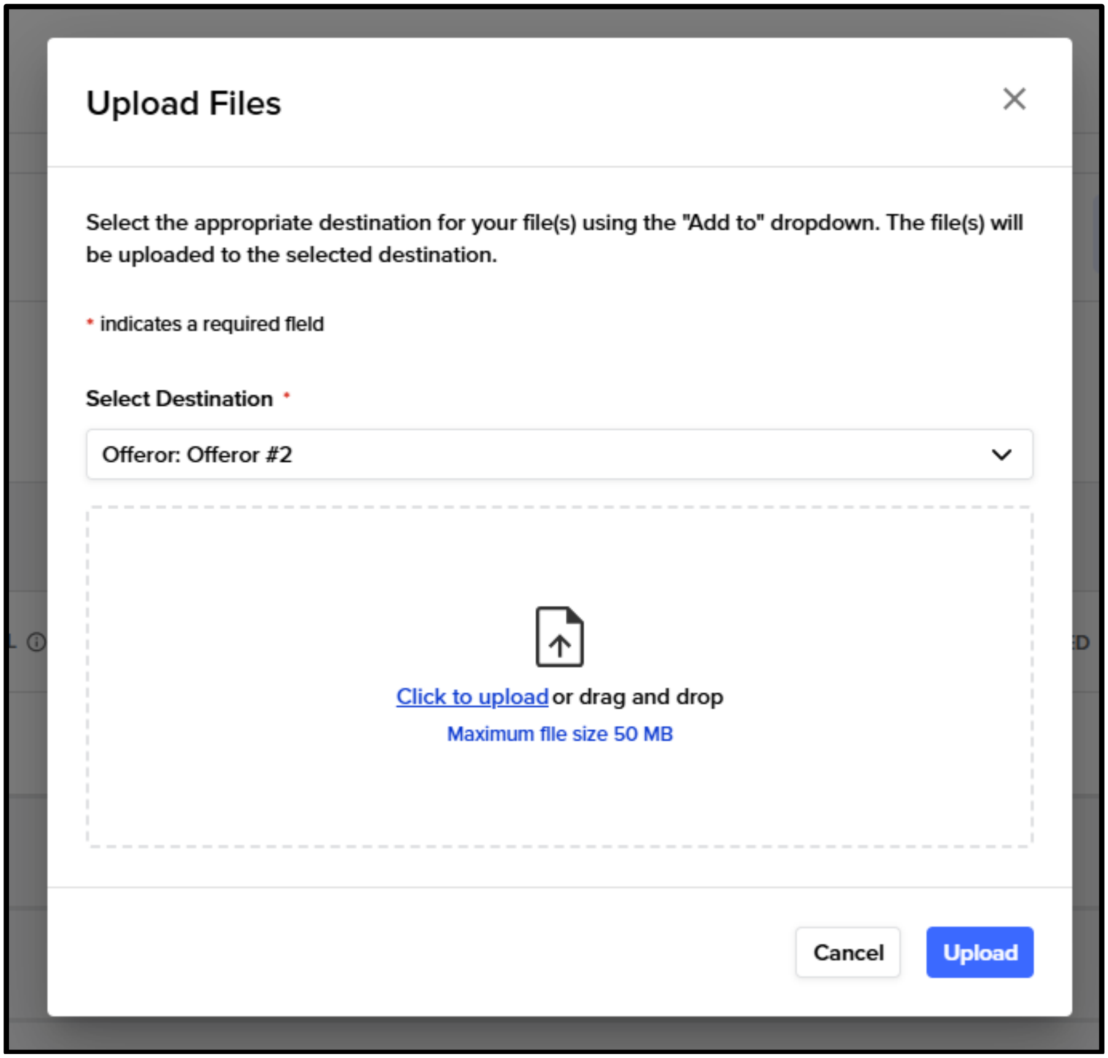

Figure 50: Upload Files pop up with Offeror #2 selected as the Destination

In the popup window, select the **Destination** section to upload the file to and select files for upload. When your selections are complete, select the **Upload** button to upload the file(s) and return to the Files page.

6.4.2 Evaluation Document Generation

Bidscale supports automated generation of critical evaluation documents. This includes **Consensus Reports, Source Selection Evaluation Board (SSEB) Reports**, and several other document types. These outputs can reflect the selected findings, ratings, and user comments from an evaluation. To start the generation of an evaluation document, select the **Create Evaluation Document** tile on the Evaluation **Files** tab.

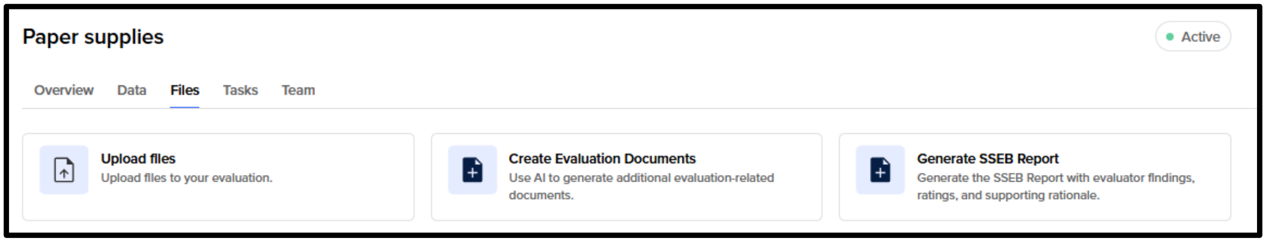

Figure 51: Create Evaluation Document tile

Selecting that tile will navigate you to the **Evaluator Template Center** where you can select an evaluation template to generate a document. The generated document will be open in Writer for review and then can be saved to the Files page, exported as PDFs or stored for internal routing and approval.

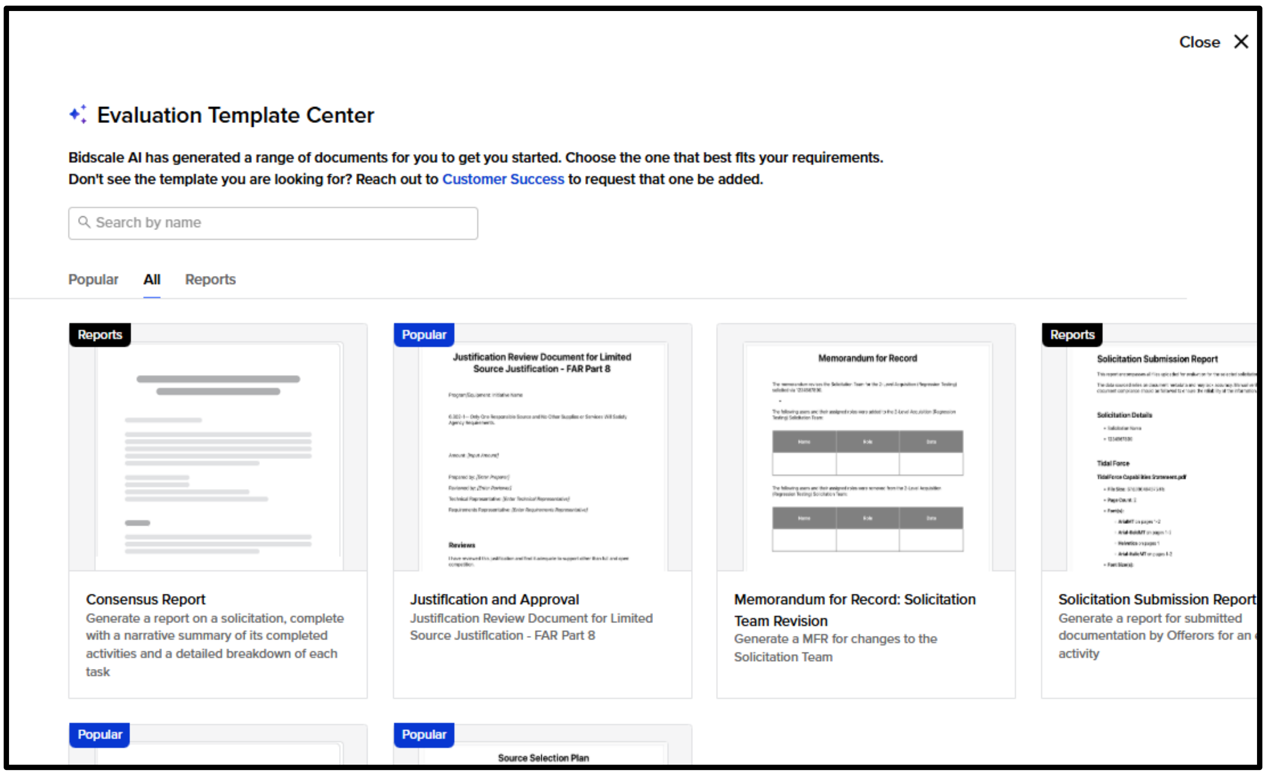

Figure 52: Evaluator Template Center

6.6 Tasks

The Tasks tab offers a centralized dashboard view of all tasks related to the Evaluation. On the left, a pie chart highlights the status of tasks in relation to their due dates—making it easy to spot items that are on track or overdue. To the right, a status bar provides a visual summary of overall task progress.
Below these visuals, a detailed table lists each task along with key information: the evaluation criteria, the offeror being assessed, the current assignee, task status, number of findings, due date, and—if the task is marked as Completed—its completion date. This view helps you quickly understand both the big picture and the finer details of evaluation progress.

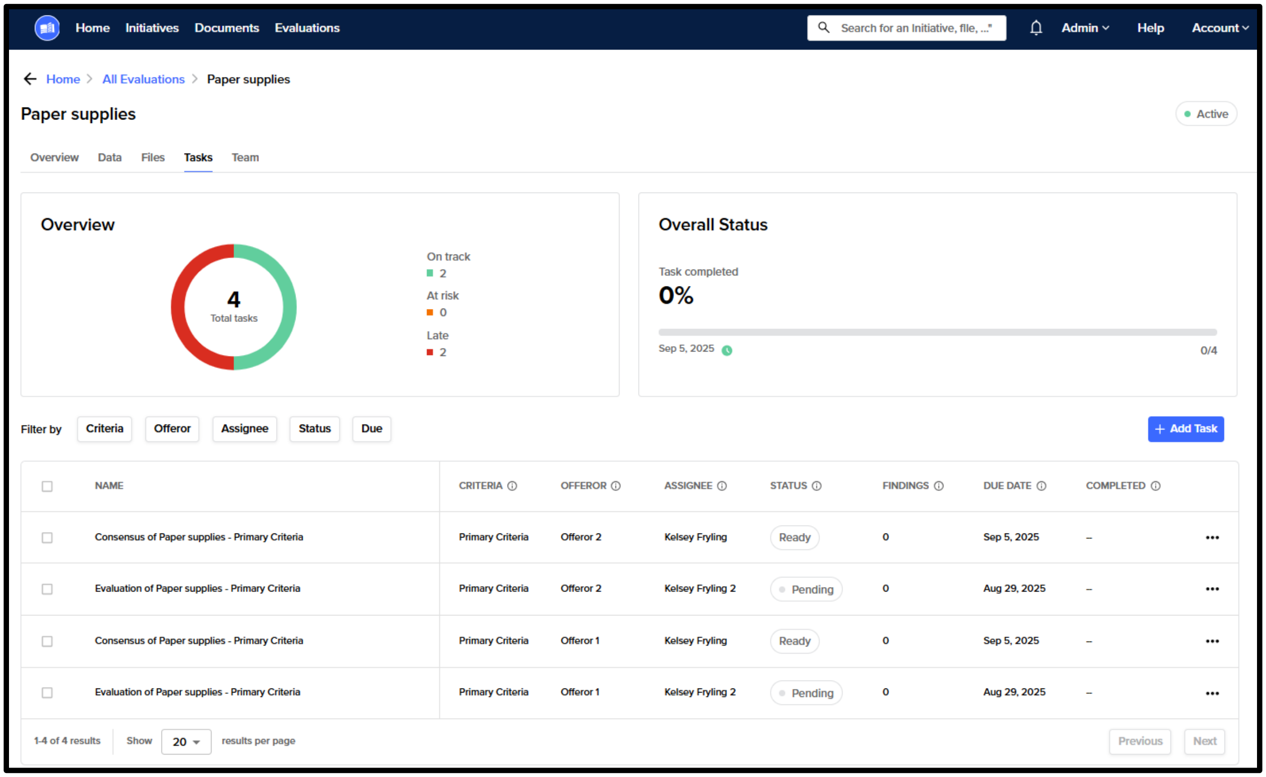

Figure 53: Tasks tab of an Evaluation

The Tasks tab also allows you to delete and add new tasks as needed after an offeror evaluation has begun. You can also edit Task Status and Due Dates on this tab.

⚠️ *Important:* If you delete a consensus task, all of its related individual evaluation tasks will be deleted.

6.7 Team

The **Team** tab allows you to view all current team members assigned to the Evaluation in addition to their permission level and tab access. It also allows you to add additional users to the team.

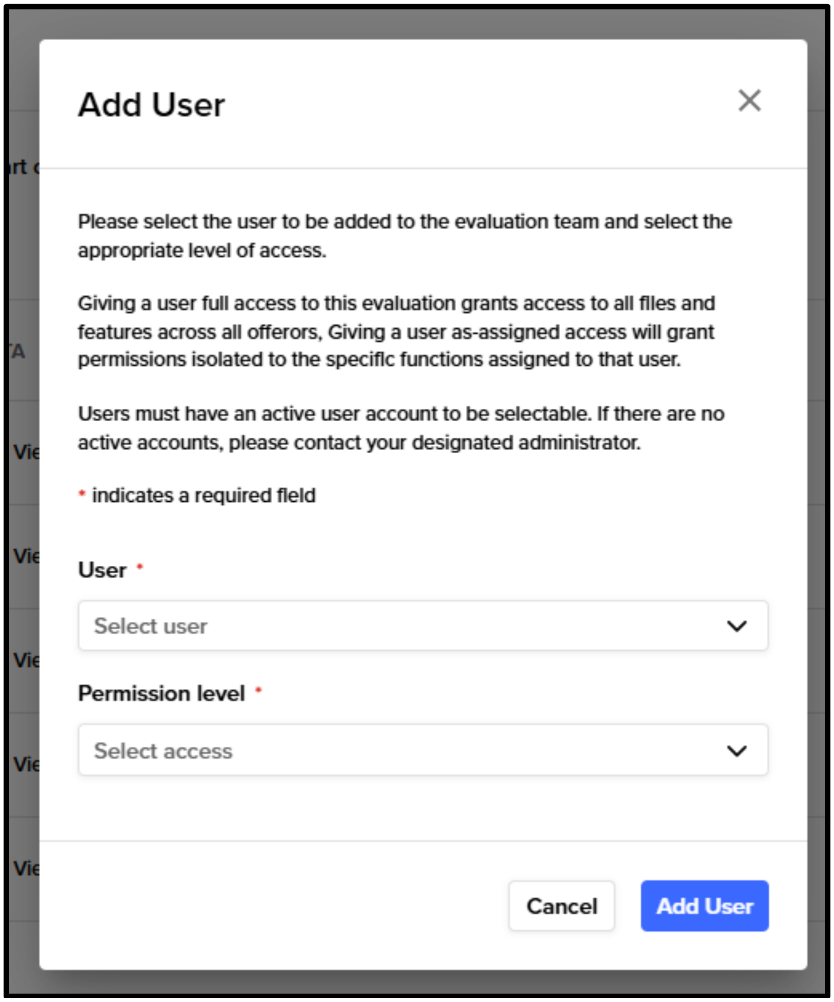

Figure 54: Add User popup on the Team tab of an Evaluation

Upon selecting **Add user(s)** a window will pop up with a list of selectable users. Make a user selection and Permission level, then select **Add User** in the popup to add them to the evaluation. If you add a user by mistake you can also remove them from the evaluation by selecting the **ellipsis** (**…**) on the user row.

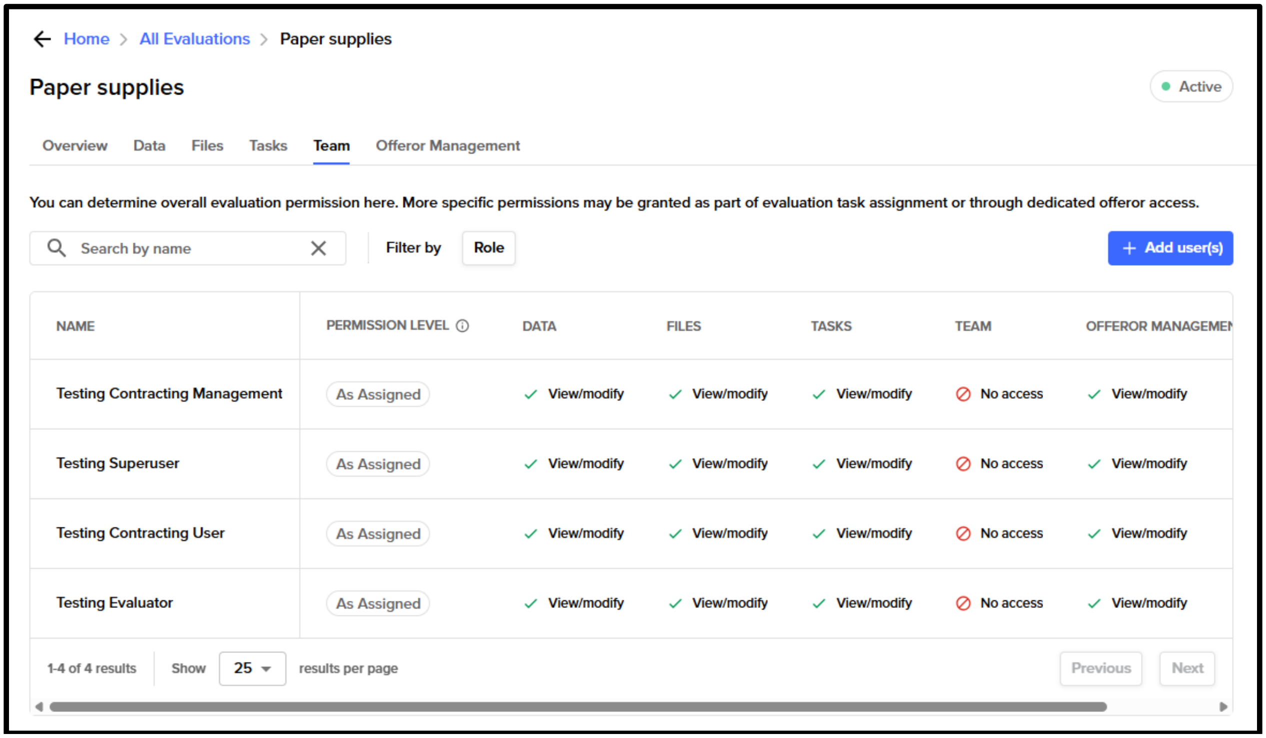

Figure 55: The Team tab within an Evaluation

6.8 Offeror Management

The **Offeror Management** tab allows users with permissions to manage offerors and their associated evaluation files. On this tab they can review and edit existing offerors as well as add new ones.
The table on this page shows all of the offerors added to the evaluation along with their evaluation files. You can begin evaluation tasks from this table and review uploaded document compliance. To add a new offeror to the evaluation select the **Add Offeror** button and input the offeror data in the **Add offeror** page.

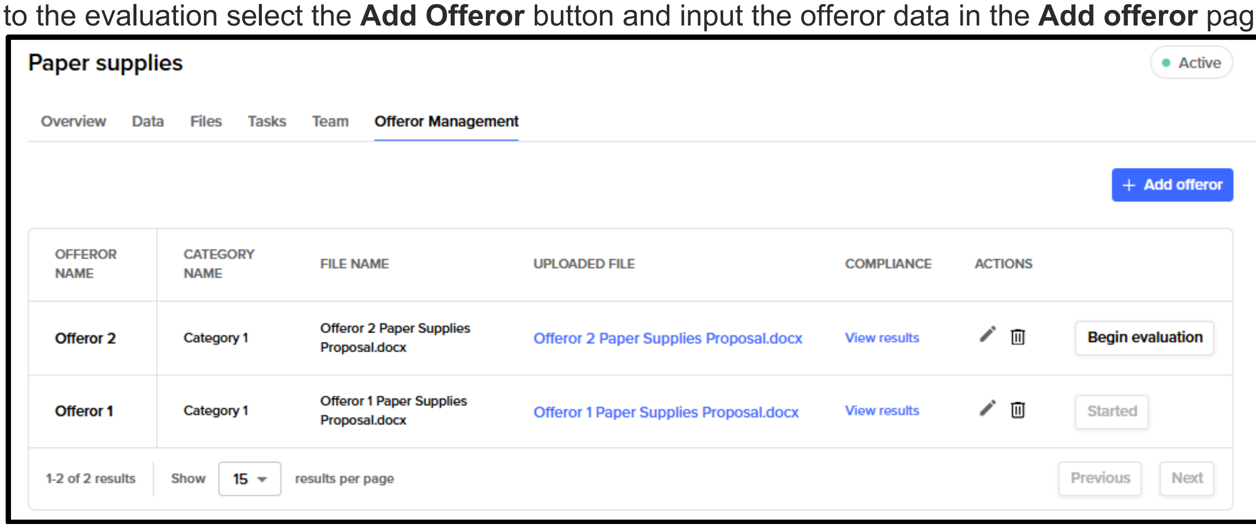

Figure 56: Offeror management tab with one offeror's evaluation started and another not yet started

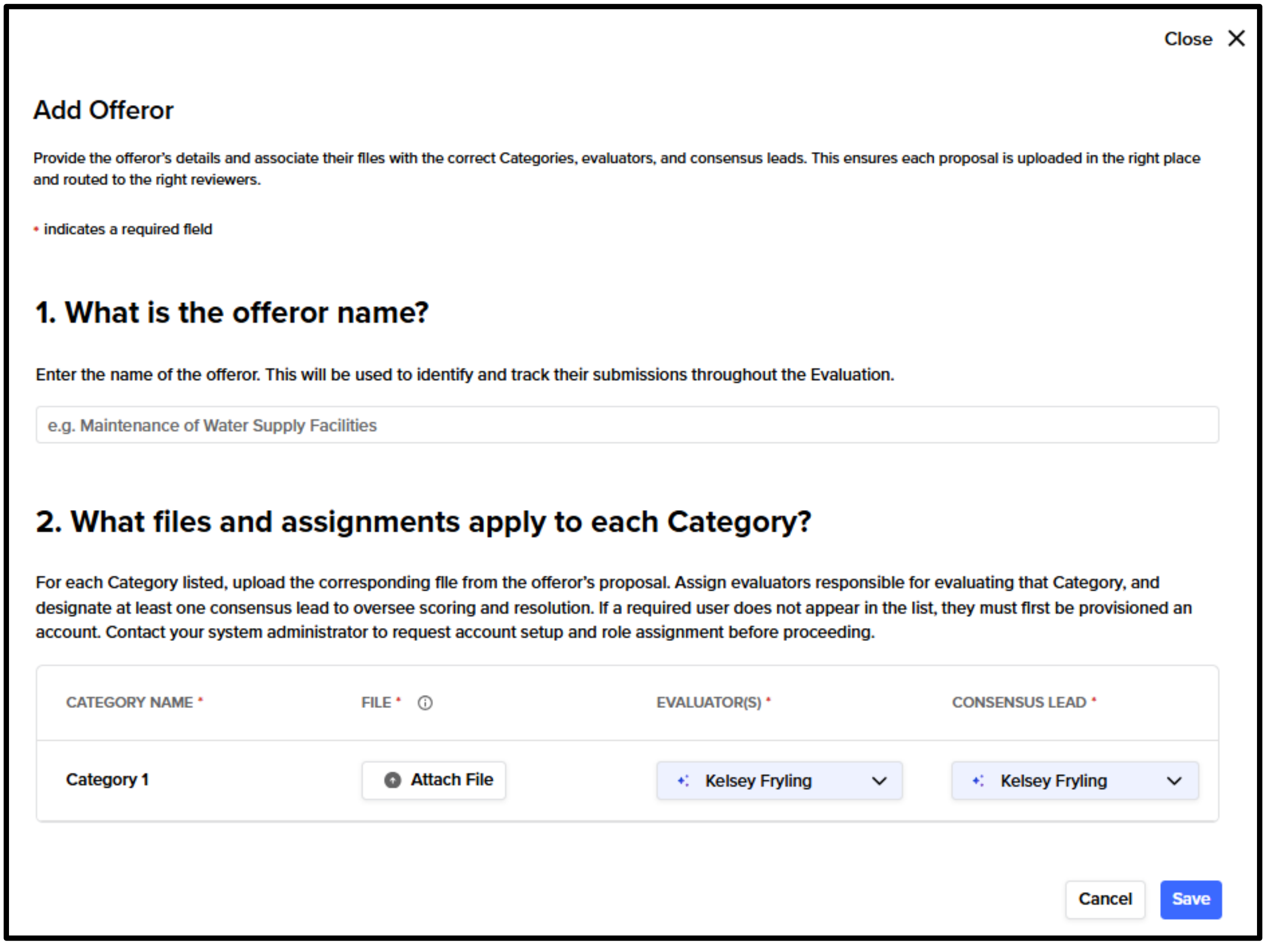

Figure 57: The Add offeror page within Offeror management

To add an **offeror** you must enter an **offeror name** and **upload a file** for each **category** configured on the Evaluation. The Bidscale AI will suggest **Evaluator(s)** and a **Consensus Lead** for your review. Select the Save button to save the offeror and return to the **Offeror Management** tab with the new offeror added to the table.

⚠ *Important:* File types are limited to Word, PDF, and Excel with a file size of 50 MB. Video files are limited to .mov, .mp4, and .mpeg with a file size of 1.5 GB.

From this tab, you can also initiate evaluation tasks for an offeror by selecting the **Begin Evaluation** button on the offeror row. An **evaluation task(s)** will be created for each evaluator and a **consensus task** for the consensus lead. The evaluation task(s) **due date** will be 7 days from the start of the evaluation and the consensus task **due date** will be 14 days from the start of the evaluation. The defaulted **due dates** can be edited as needed on the **Tasks** tab. If an evaluation has already started, you'll see a grayed-out **Started** indicator instead.

To **edit** an offeror's name and category files, select the pencil icon on the offeror's row.

⚠ *Important:* An offeror's name and it files can only be edited up until the evaluation for that offeror begins. To **delete** an offeror, select the trashcan icon on the offeror row.

Each uploaded document for an offeror is automatically reviewed for **Compliance**, and you can view the compliance results by selecting **View results** in the **Compliance** column. This opens a right side page drawer with the following details about the file:

- Projected Read Time
- Page count
- File type
- File size
- Font information
- Margin information

Video submissions do not have a compliance review at this time.

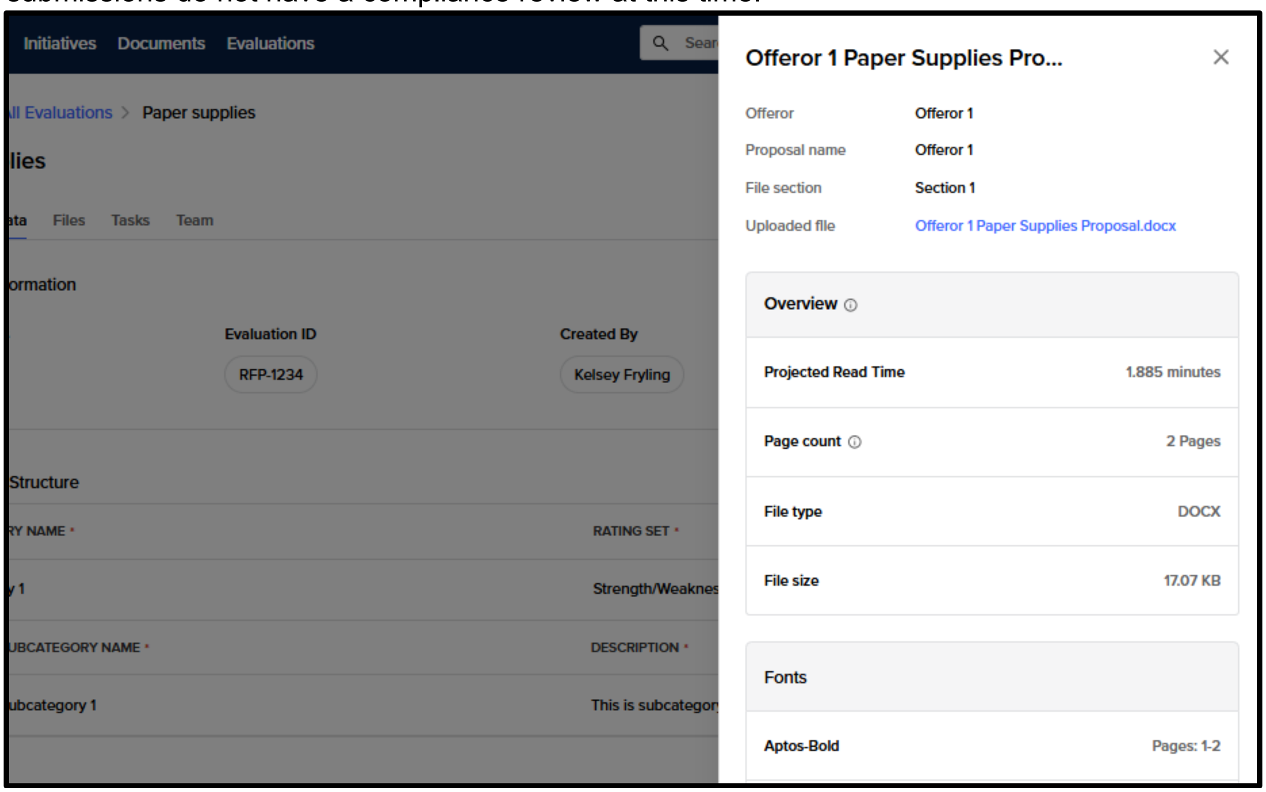

Figure 58: Document compliance within the Data tab

7: Document Review & Approval on Initiatives

Document Review and Approval help document collaborators and stakeholders track document status, assign reviewers/approvers, and ensure a clear, auditable workflow.
Users on an Initiative can perform the following actions on documents that are uploaded or generated on an

Initiative:

- **Update document status**
- **Initiate the review process and assign a reviewer**
- **Complete the review process**
- **Reject the review process**
- **Initiate the approval process and assign an approver**
- **Finalize the approval process**
- **Reject the approval process**
- **Archive**

7.1 Template Configuration for Review and Approval

All documents can be routed for review and approval. However, in order to configure a template to require it, a user with Admin Panel access must navigate to **Admin > Organization > Template Configuration and mark the template as approval process required**. There are additional details regarding how to make these configuration changes in our Bidscale Admin User Guide.

7.2 Available File Statuses

The below table outlines the complete list of statuses and their description.

Status	Description
Draft	Default status for uploaded files or template generated documents that do not require approval
Review Required	Default status for documents generated from templates that require approval
Pending Review	Waiting for reviewer input or sign-off
Review Complete	Feedback complete and document ready for approval assignment
Pending Approval	Awaiting final approver confirmation
Final	No further edits expected
Archived	Document is stored for reference, no active use

7.3 Initiate Review or Approval

Review and Approval initiation can occur from two locations within Bidscale. On the Files tab of an Initiative or within Writer. After a review or approval is initiated, it will be added as a new Task on the Tasks tab titled "Review [Document Name]" or "Approve [Document Name]".

7.3.1 Files Tab

Select the current status in the Status column of the document row and select **Pending Review** to initiative a Review. Repeat the same step, selecting **Pending Approval** to initiative an Approval.

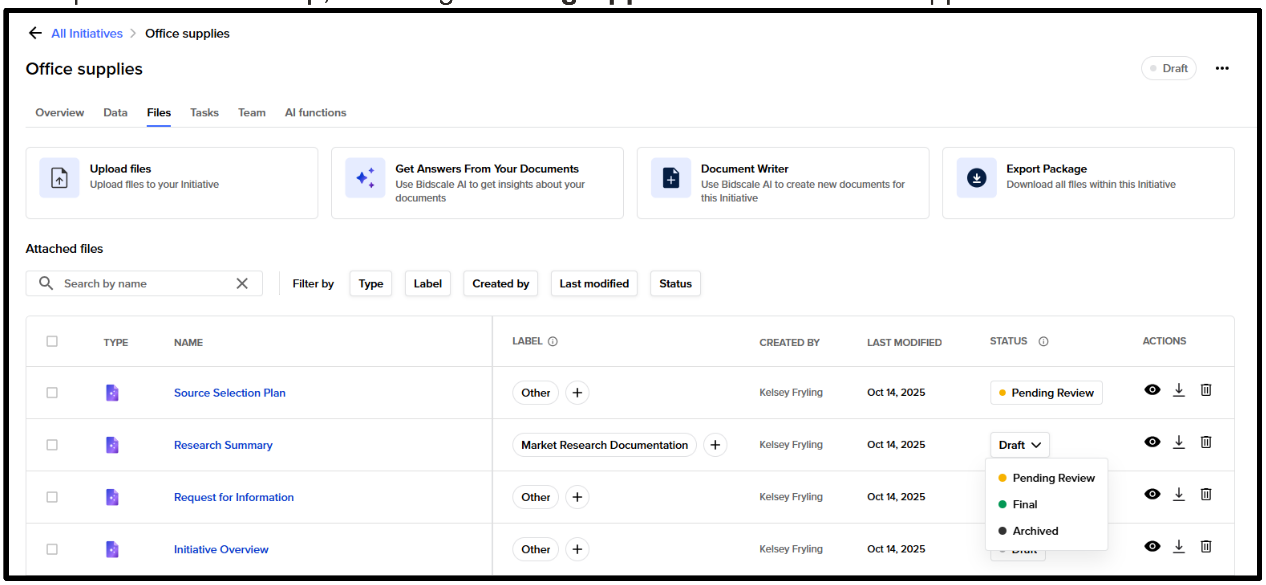

Figure 59: Initiating a review on the Files tab

Upon selection of **Pending Review** or **Pending Approval** a pop-up window will display requiring you to select a user to complete the Review or Approval. Select a user and then ‘Start’ to assign and update the status of the file to Pending Review or Pending Approval.

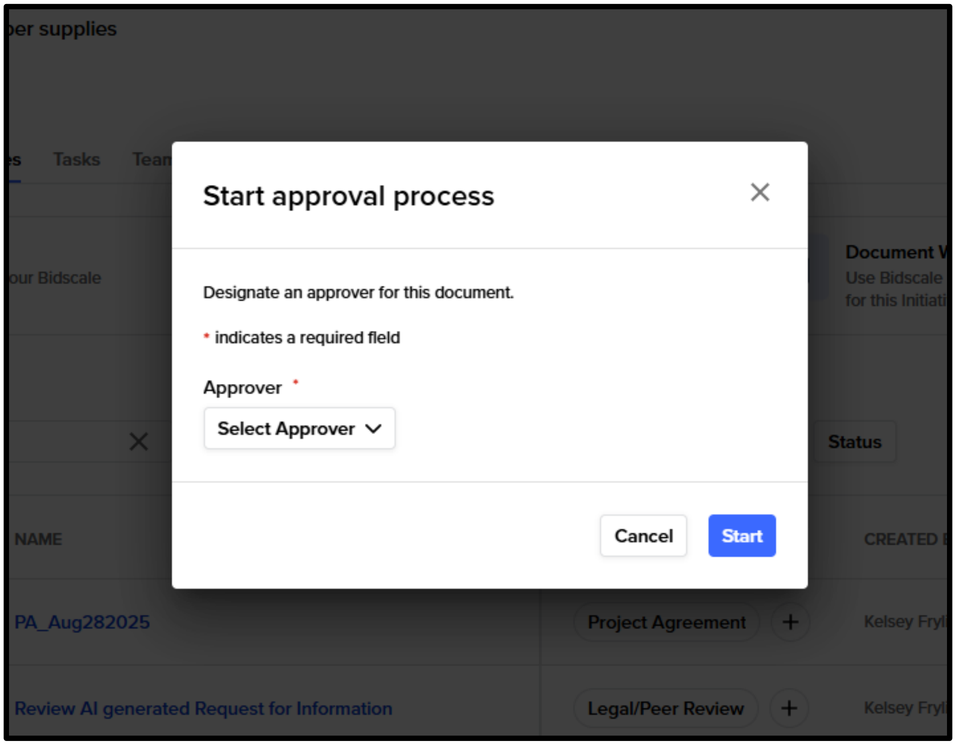

Figure 60: Confirming approval initiation (a similar popup will display when starting the review process)

7.3.2 Writer

Another option for initiating a review or approval is from within Writer. Select the **Initiate review process** or **Start approval process** button to the left of **Save** to start the process:

Figure 61: Initiating a review from Writer

You will see the same initiation pop-up as described above where you must select a user to assign for review or approval. Once a document is in review or approval you will see its status update in the table on the **Files** tab. To view who is currently assigned the task, you can view the task detail on the **Tasks** tab.

7.4 Complete a Review or Approval

When a review or approval task is in progress and you are assigned the task, you can complete your task from several locations within Bidscale. This makes it more convenient for you to decide which process and location works best for reviewing. You can complete your review within the **Files** tab via the **Status** column, in document preview, or in Writer. When you complete the review, the corresponding task is marked complete on the Tasks tab.

7.4.1 Files Tab

On the **Files** tab you can complete your review or approval by directly updating the document status in the **Status** column of the **Files** tab table.

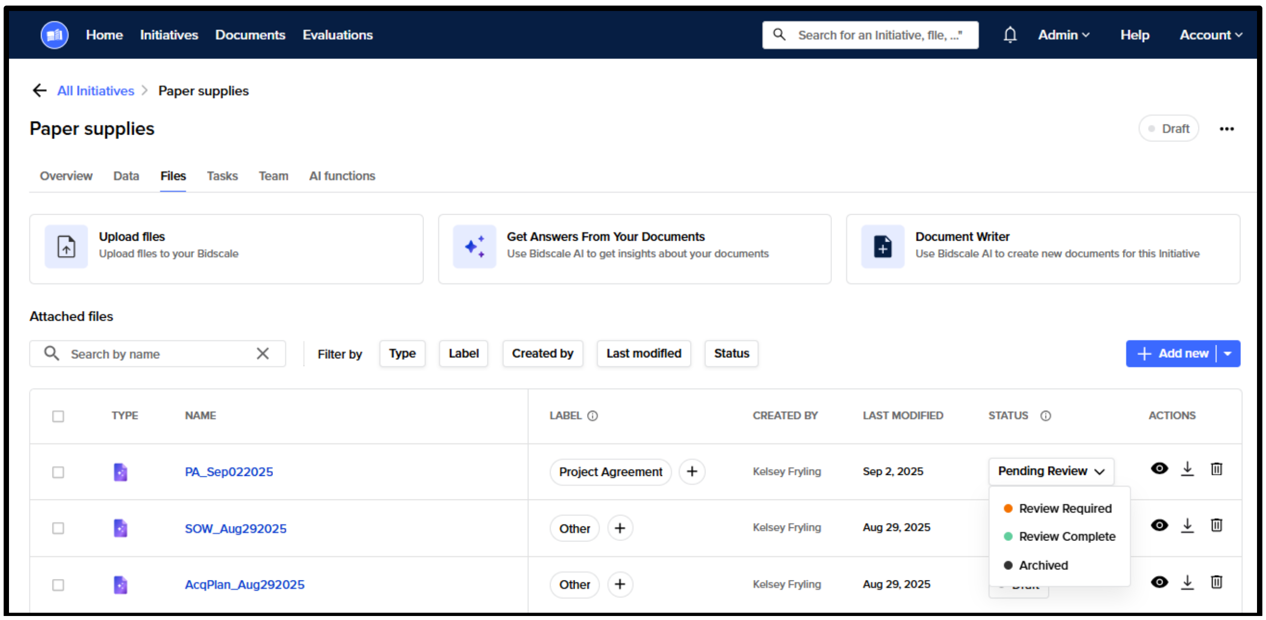

Figure 62: Available actions in the file drawer for a reviewer after a review is initiated

7.4.2 File Preview

A document can also be reviewed from within the file preview window. To complete your review this way, select the **document name** on the **Files** tab and then the **Click to Complete Review** button.

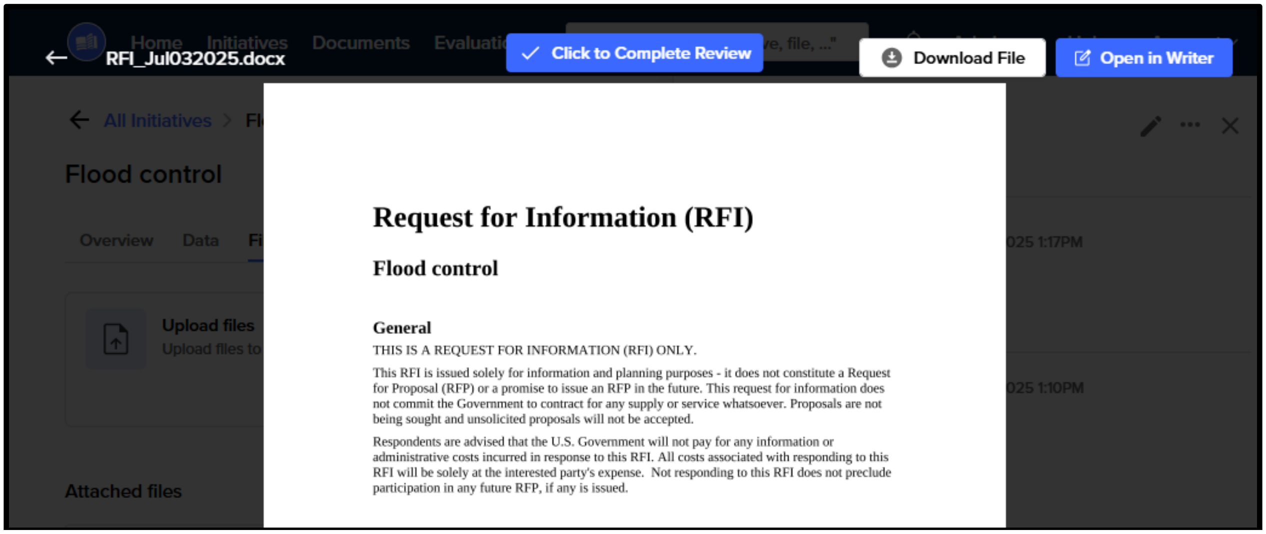

Figure 63: Complete a review from within the file preview pane

If you confirm, the status of the file will change to **Review Complete**, the status change will be added to the activity log, and the document will be available for Approval assignment.

7.4.3 Writer

In Writer, a **Complete Review** button will appear when a document is assigned to you for review. When selected, a confirmation popup will appear. If you confirm, the status of the file will change to **Review Complete**, the status change will be added to the activity log, and the document will be available for Approval assignment.

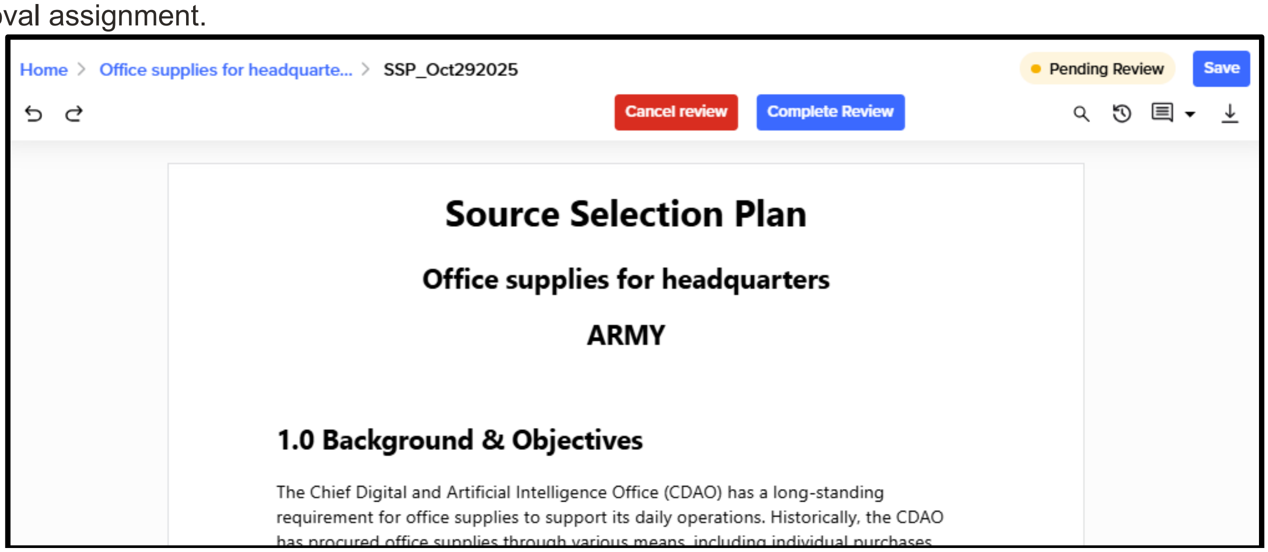

Figure 64: Complete a review from within Writer

7.5 Reject or Cancel a Review or Approval

You can update the status of a document to a prior step in the review and approval process or cancel the

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entire process by archiving a document. This can be done from several locations within Bidscale – within the **Files** tab, the document preview and Writer.

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