



WHEN WE CREATE A GOOD BRAND,  
**WE OPEN A PORTAL TO THE FUTURE.**

## **EVALUATION**

**ATD-MT-0022**

## I. Objectives

**After reading this training module, you will be able to:**

1. Understand the concepts of Petrobras evaluation process:
  - Understand what is 'product groups';
  - Understand the evaluation criteria;
  - Understand the concepts of "Requisite", "Indicator" and "Questionnaires" in the evaluation process.
2. Search and follow up your company processes.



### Concepts



### What are goods and/or services family?

Families are divisions into the supply lines (goods or services), where there is a group by similar items. They divide each other into:

- Simplified good and services families: require evaluation only in aspects “Legal” and “Technical” with simple requisites.
- Complete good and services families: require evaluation in several aspects, such as technical capacity, economic situation, regularity, quality, security and environmental management system.



## II. Concepts

### Concepts



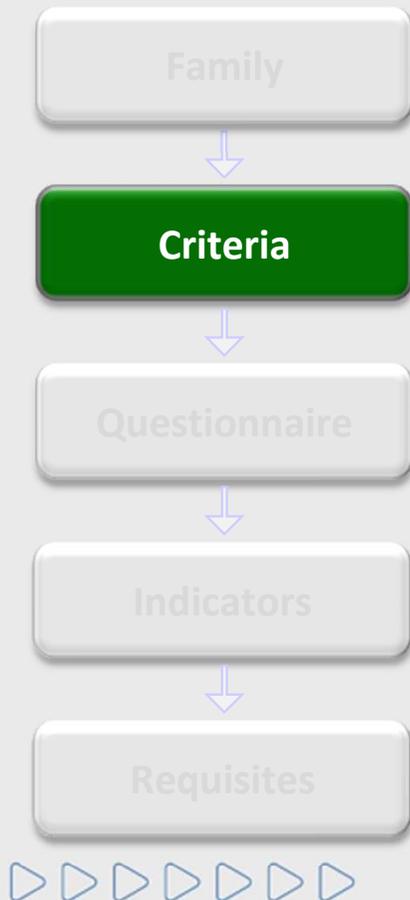
### Which are the evaluation criteria?

It's through the criterias that Petrobras evaluate the companies whose aim the Complete or Simplified Registry. They can differ according to the registry, supplier type and selected goods or services items. The used criterias are:

- Economic: Requisites and indicators set that evaluate the supplier's economic and financial situation based on the financial results of the company.
- Managerial: Requisites and indicators set that evaluate the implantation guide of the Quality Management System, measuring the commitment with the quality and continuous improve, appreciating and stimulating the certification according to the ISO 9001 standard.



## II. Concepts

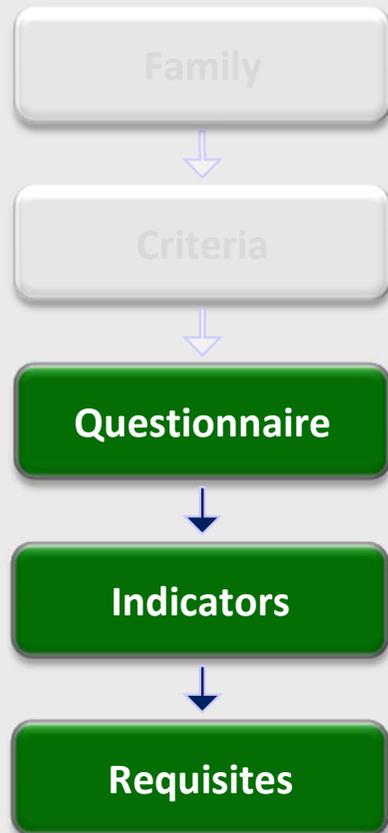


### Which are the evaluation criteria? (continuation)

- Legal: Requisites and indicators set that evaluate the regularity of the companies in accomplishment of their legal obligations with the market , the government organizations and the society.
- Technical: Requisites and indicators set that evaluate the technical capacity, supply tradition, technical balance, eventual homologations and specific qualifications of the service or material which is the object of the evaluation.
- SMS: Requisites and indicators set that evaluate the implantation guide of the Security, Environment and Occupational Health Management System, appreciating and stimulating the certifications according to the ISO 14001 and OHSAS 18001 standards.
- Accreditation: Requisites and indicators set that evaluate the resellers on the accreditation process.

## II. Concepts

### Concepts



### What are questionnaires, indicators and requisites?

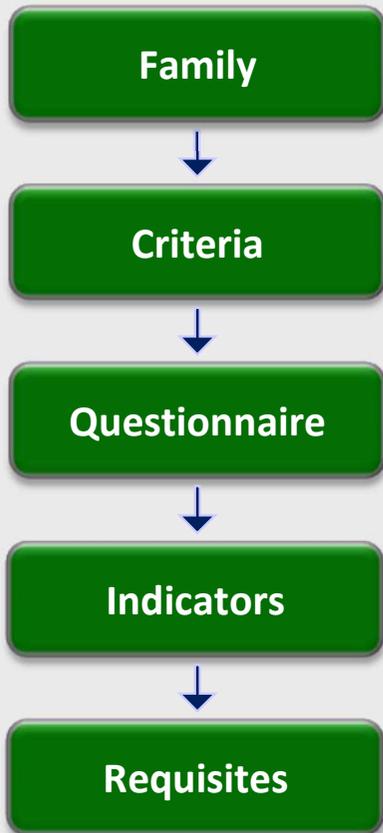
The evaluation process done by Petrobras is based on the filling of questionnaires, composed by one or several indicators which evaluate the candidate to supply goods and/or services.

These indicators gather the requisites according to the topic they are related.

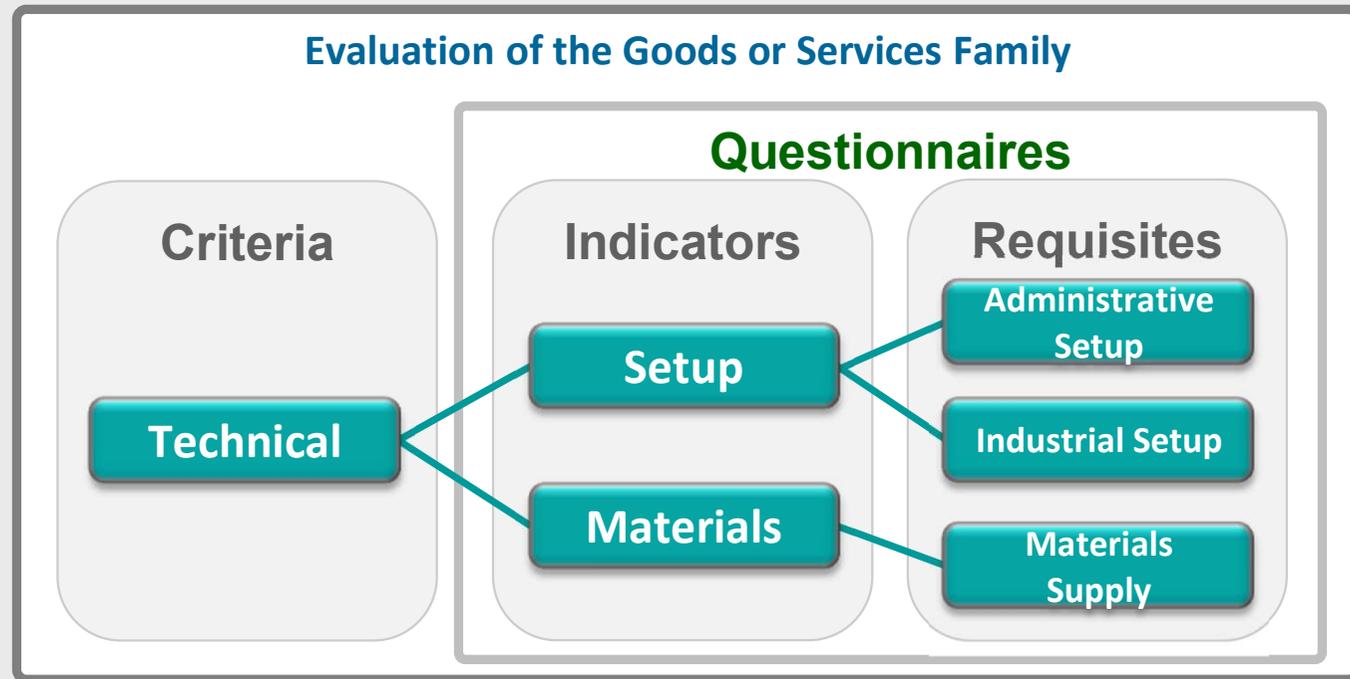
For continuing the evaluation process, it's necessary that some exigencies (requisites) are accomplished, following a previous established criteria.

## II. Concepts

### Concepts



In the picture below, there is an example of the relation among the items:



# III. How to Access

## How to access the feature “Results from Evaluation”

At the Portal home page, inform your user or CPF and password to access the restricted area.

The screenshot shows the Petronect website interface. At the top, there is a navigation menu with links: The Petronect, Registration at Petrobras, Purchasing and Contracting, Payments, Electronic Signature, Latest News, and Help. On the right side of the header, there are search and login options: SEARCH and LOGIN. The main banner features the text "Intelligent Opportunity Search" and a search input field with the placeholder "Opportunities/Bids search here!". Below the banner, there is a message: "Your search for bidding and/or bidding in progress has changed! Use this space with the ideal key word to do your search!". A central graphic shows a woman in a blue and white uniform holding a document. To the right of the graphic, the text reads: "Attention, Supplier! Our Adhesion Term has been updated. Please read it again for acceptance." A login modal is open on the right side, containing the following fields and options: "Login", "Key (Petrobras Group) or User (Supplier)", "Password", a "CONTINUE" button, and two links: "I forgot my password >" and "I still don't have a record >".



# III. How to Access

Click on 'Registry at Petrobras' to check the menu options.

The screenshot shows the Petrobras Suppliers Registry website. At the top, there are three menu items: 'The Petronect', 'Registry at Petrobras' (highlighted with a red box), and 'Electronic Quotes'. Below the menu is a navigation bar with links: 'About Registry at Petrobras', 'Announcements', 'Company Identification', 'Evaluation Questionnaires', 'Results from Evaluation', 'Events', 'Contact Us', and 'Track Your Situation'. The main content area is titled 'ABOUT REGISTRY AT PETROBRAS' and contains a notification titled 'CHANGES IN THE REQUESTS FOR EVALUATION OF FAMILIES' dated 07/27/2018. The notification text is as follows:

**Dear Supplier,**

After a research carried out by Petrobras Suppliers Registry, we have checked that the **Technical Criterion's** processes with a large number of families to be evaluated have a high risk of failure. It occurs, for example, due to the large amount of documents and information to be provided by the companies.

Therefore, in order to optimize the registry evaluation and increase the chances of approval on the Technical Criterion, from July 30th 2018, the Technical Criterion's evaluation processes will change:

- For inclusion of new families, the process will be opened with up to 5 families of goods and/or 5 families of services;
- For re-evaluation of reprovved families, the process will be opened with up to 5 families of goods and/or 5 families of services;

Have in mind that, with the Brazilian **Law 13.303/16**:

- Any company that is interested can participate the Public Tenders, even if it does not have the family in its registry;
- Companies that have the families that are used in the tenders will be notified as soon as the opportunity is published and the registry data will be able to be used during the qualification phase of this opportunity.

Best Regards,  
**Petrobras Suppliers Registry**



### III. How to Access

Access the "Registry at Petrobras" menu, then click the submenu "Results from Evaluation". A side menu appears, select the "Evaluation" option.

The screenshot displays the Petronect web application interface. At the top, there are three main menu items: "The Petronect", "Registry at Petrobras" (highlighted with a blue box), and "Electronic Quotes". Below these, a secondary navigation bar contains links for "About Registry at Petrobras", "Announcements", "Company Identification", "Evaluation Questionnaires", "Results from Evaluation" (highlighted with a blue box), "Events", "Contact Us", and "Track Your Situation". On the left side, a vertical sidebar menu includes "Notes", "CRRC/DRS", "Monitoring Panel", and "Evaluation" (highlighted with a blue box). The main content area is titled "Process Follow-up" and features a "Search criteria" section with two dropdown menus: "Process Type" set to "All" and "Status" set to "All", followed by a "Search" button. Below the search section is a table titled "Processes" with the following columns: "Process Number", "Process Type", "Status", "Questionnaires", "Supply Type", and "Action". The table currently contains no data rows.



## IV. Search and Follow-Up

### Follow up Process

After clicking on “Evaluation”, it will be possible to access all the company process.

Process Follow-up

Search criteria

Process Type:

Status:

Processes

Process Number	Process Type	Status	Questionnaires	Supply Type	Action



## IV. Search and Follow-Up

### Description of fields:

**Process Number:** number of the registered process.

**Process Type:** this field has all the process types available, such as:

**Inscription:** supplier's identification process.

**Renewal:** submit to a new evaluation to renewal of the CRCC.

**SMS Renewal:** to renew the SMS criteria.

**Line Increase:** request to increase the goods/services line supplied.

**Review:** evaluation process review requested by Petrobras.

**ISO 9001 Renewal:** request to renew the certificate.

**Reclassification:** evaluation process review requested by the supplier.

**Cancellation Item:** process to remove products from the registration.

**Item Suspension:** suspension of the supply item.



## IV. Search and Follow-Up

**Description of fields: (continuation)**

**Item recovery:** request which supply has been suspended.

**Supply Extension:** supply extension to other registration.

**Supplier Type Update:** update of the supplier type (manufacturer dealer, manufacturer not dealer, reseller/distributor, goods supplier and services).

**Status:** status of the questionnaires (“Questionnaire Opened” or “Questionnaire Closed”).

**Questionnaires:** available questionnaires for the criteria.

**Supply Type:** selected information on the Supplier’s Identification step.

**Action:**  allows to check detailed information.





## IV. Search and Follow-Up

2. In the field “Status” choose the status of the processes to be searched (“All”, “Open processes” or “Closed processes”).

2

The screenshot displays the 'Process Follow-up' interface. At the top, there is a header 'Process Follow-up'. Below it, the 'Search criteria' section contains two dropdown menus: 'Process Type' (set to 'All') and 'Status' (set to 'All'). A 'Search' button is located to the left of the 'Status' dropdown. The 'Status' dropdown is open, showing three options: 'All', 'Open Processes', and 'Closed Processes'. Below the search criteria is a table titled 'Processes' with the following columns: 'Process Number', 'Process Type', 'Status', 'Questionnaires', 'Supply Type', and 'Action'. The table is currently empty. At the bottom left of the interface, it says 'Number of Processes 0'. A blue box highlights the 'Search' button, and a callout box with an arrow pointing to it contains the text: 'Click on the button “Search” to confirm the search.'



## IV. Search and Follow-Up

Select the process and click on the image , as you can see on the picture below.

Process Follow-up

Search criteria

Process Type: All

Status: All

Search

Processes

Process Number	Process Type	Status	Questionnaires	Supply Type	Action
9000074541	Reclassification	Opened Questionnaire	Integrity	N/A	
9000073370	Registration	Closed Questionnaire	Integrity	N/A	
9000013519	Renewal	Closed Questionnaire	Integrity	N/A	
9000012944	Reclassification	Closed Questionnaire	Integrity	N/A	
9000001364	Reclassification	Closed Questionnaire	Integrity	N/A	
9000001137	Reclassification	Closed Questionnaire	Integrity	N/A	
9000001134	Reclassification	Closed Questionnaire	Integrity	N/A	
9000001133	Reclassification	Closed Questionnaire	Integrity	N/A	
9000001127	Reclassification	Closed Questionnaire	Integrity	N/A	
9000001126	Reclassification	Closed Questionnaire	Integrity	N/A	

Number of Processes 245



## IV. Search and Follow-Up

This step is divided into 3 sections: “Header”, “Questionnaire” and “Supply List”.

Fornecedor: (TESTE) EMPRESA TESTE CRCC CNPJ: 85646782000193 Processo: 9000073370

Back

**Cabeçalho**

Details Notes

DOC  
 PRE  
 FINAL

No...	Notes	Comment
The table does not contain any data		

**Questionário**

Criteria type	Situation	Close date
Integrity	Closed Questionnaire	17.01.2018



## IV. Search and Follow-Up

### Questionnaire

Criteria type	Situation	Close date	
Technical	Questionnaire Closed	27.03.2013	
Managerial	Questionnaire Closed	04.04.2013	

### Supply List

Supply List	Criteria needed by family
<input type="checkbox"/> Complete	Family   Technical   Managerial
<input type="checkbox"/> Simplified	Select one supply type



## IV. Search and Follow-Up

In the section “Header”, two sheets can be presented:

- “Details”: presents detailed information about the process;
- “Notes”: presents the notes and comments set on the evaluation process.

**SUPPLIER** 44365262000125 Process: 3000017936

Back

Header

Details Notes

Supply

More details

Sum of goods

Simplified:

Complete:

Sum of services

Simplified:

Complete:

Process

Process type: Registration

Start date: 27.03.2013 14:45:15

Finish date: 01.04.2013 16:14:54

Questionnaire

Criteria type	Situation
Economic	Questionnaire Closed

The sheet “Notes” will be available after the evaluation of the questionnaires and the report of the results.



## IV. Search and Follow-Up

Click on “More details” to check the products group selected in “Supplier Identification”.

**SUPPLIER** 44365262000125 Process: 3000017936

Back

Header

Details Notes

Supply Process

More details

Sum of goods  
Simplified:   
Complete:

Sum of services  
Simplified:   
Complete:

Questionnaire

Criteria type	Situation	Close date
Economic	Questionnaire Closed	27.03.2013

**More details**

Description	Code	Critical	Recommended Evaluation	CORP-CADASTRO CORPORATIVO
Mica ;Obturating ;Drilling oil wells ;	98000463	Familia RQT	Of documents	
Natural gas delivery station (City gate)	98005350	PGQMSA	On site for tec/ger/SMS	
Ammonium bifluoride for oil wells	98007894	Familia RQT	Of documents	

OK



## IV. Search and Follow-Up

In “More details”, you can check:

- Description: products groups evaluated on the process.
- Code: process number.
- Recommended Evaluation: the evaluation type.
- Other fields: registries associated to the supply locals selected by the supplier on the identification step.



## IV. Search and Follow-Up

Description	Code	Critical	Recommended Evaluation	CORP- CADASTRO CORPORATIVO
Stainless steel pipe	98010023		Of documents	R
Dewaxing additives and paraffin inhibitor	98010716		On site for all criterias	R

Click on 'OK' to close the window.



## IV. Search and Follow-Up

The 'Status' is composed by the combination of the final result to the evaluated criterias:

Approved (A): is the satisfactory grade in all evaluated criteria (Technical, Managerial, Economics, Legal);

Technically Qualified (Q): is the approval only in the technical aspects, in other words, the Technical, SMS and Managerial Criteria;

Reproved (R): is the unsatisfactory result in the Technical qualification criteria;

Cancelled (X): are the supply items cancelled by the company's request or by Petrobras' definition.



## IV. Search and Follow-Up

### Sheet of 'Notes':

This sheet presents the information of the process, such as notes and comments. Choose between the presented options as displayed on the picture below.

The screenshot shows a software interface with a 'Header' section containing two tabs: 'Details' and 'Notes'. The 'Notes' tab is active. Below the tabs are three radio buttons: 'DOC' (selected), 'PRE', and 'FINAL'. A 'Filter by family:' field with a 'Search' button is located below the radio buttons. A table below the filter shows a hierarchical list of items, including 'CORP- CADASTRO CORPORATIVO', 'M-11 - Mica ;Obturing ;Drilling oil wells ; (98000463)', 'M-23 - Natural gas delivery station (City gate) (98005350)', and 'M-12 - Ammonium bifluoride for oil wells (98007894)'. A '3,84' value is displayed in a box at the bottom right of the table area. A callout box on the right side of the interface explains the types of notes.

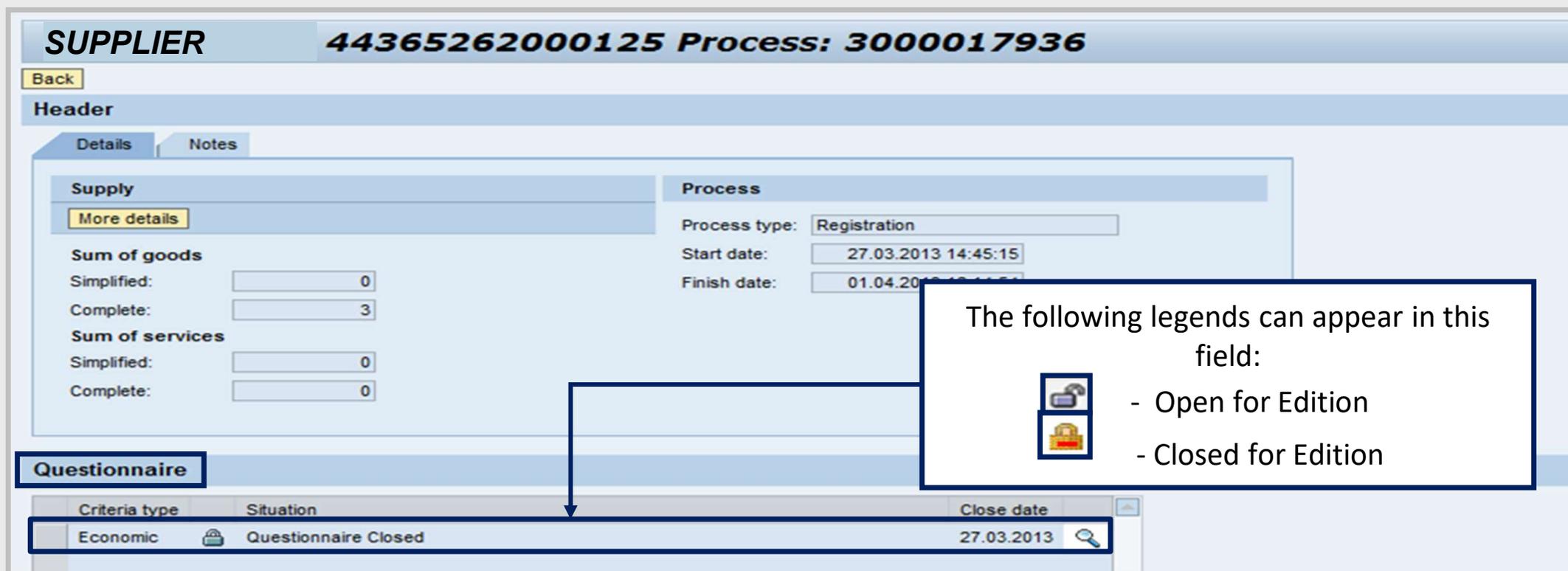
Types of Notes according to the evaluation:

- DOC: evaluation is made through the documents inserted by the company.
- PRE: resulting note from the evaluation made at the company site.
- FINAL: final note of documental or current evaluation.



## IV. Search and Follow-Up

To display a questionnaire, click on the image  at the end of the selected line.



The screenshot displays a software interface for a supplier record. At the top, it shows 'SUPPLIER 44365262000125 Process: 3000017936'. Below this is a 'Header' section with 'Details' and 'Notes' tabs. The 'Details' tab is active, showing 'Supply' and 'Process' information. The 'Supply' section includes a 'More details' button and 'Sum of goods' and 'Sum of services' with input fields for 'Simplified' and 'Complete' counts. The 'Process' section shows 'Process type: Registration', 'Start date: 27.03.2013 14:45:15', and 'Finish date: 01.04.2013 14:45:15'. Below the 'Header' is a 'Questionnaire' section with a table. The table has columns for 'Criteria type', 'Situation', and 'Close date'. A row is highlighted with a blue background, showing 'Economic' as the criteria type, a lock icon in the 'Situation' column, 'Questionnaire Closed' as the situation, and '27.03.2013' as the close date. A magnifying glass icon is visible at the end of this row. A callout box points to this icon, containing the text: 'The following legends can appear in this field:' followed by two items: a key icon for '- Open for Edition' and a padlock icon for '- Closed for Edition'.

Criteria type	Situation	Close date
Economic	 Questionnaire Closed	27.03.2013 



## IV. Search and Follow-Up

The following page will display the questionnaire of a determined criterion (as selected in the page before) with its list of indicators and requisites related. Clicking on each questionnaire, it's possible to access their requisites and information inserted.

The screenshot shows a web application window titled "Open Questionnaire". The main content area is titled "SUPPLIER" and contains a tree view of technical specifications:

- Technical
  - Materials Supply Tradition
    - Supplies Tradition
  - Ratification
    - Potentially Explosive Atmosphere Certification

To the right of this tree view, there is a column of five red 'X' icons. The first, third, and fifth 'X' icons have a yellow "Edit" button next to them. Three callout boxes with arrows point to the first, second, and third 'X' icons, labeled "Criterion Questionnaire", "Indicator", and "Requisite" respectively.

The following legends can appear in this field:

-  - Complete
-  - No Filling or Incomplete



## IV. Search and Follow-Up

In “Supply List”, the products group selected in “Supplier Identification” will be available, segmented by registration (Complete and/or Simplified).

The screenshot displays two main sections of the software interface:

- Questionnaire:** A table with columns for 'Criteria type', 'Situation', and 'Close date'. The first row shows 'Accreditation' as the criteria type and 'Questionnaire Opened' as the situation. A search icon is visible in the 'Close date' column.
- Supply List:** A table with columns for 'Supply List' and 'Criteria needed by family'. The 'Supply List' column has two options: 'Complete' (highlighted with a blue box) and 'Simplified'. The 'Criteria needed by family' table lists two families with their accreditation status checked:

Family	Accreditation
M-11 - Mica ;Obturating ;Drilling oil wells ; (98000463)	<input checked="" type="checkbox"/>
M-11 - blast furnace (iron) slag ; (98002232)	<input checked="" type="checkbox"/>

A callout box with a blue border and white background contains the text: "By clicking on one of the registries, you can view the supply items related to the process. Next to each family, the evaluation criteria will be displayed." An arrow points from this callout box to the 'Complete' option in the 'Supply List' table.





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