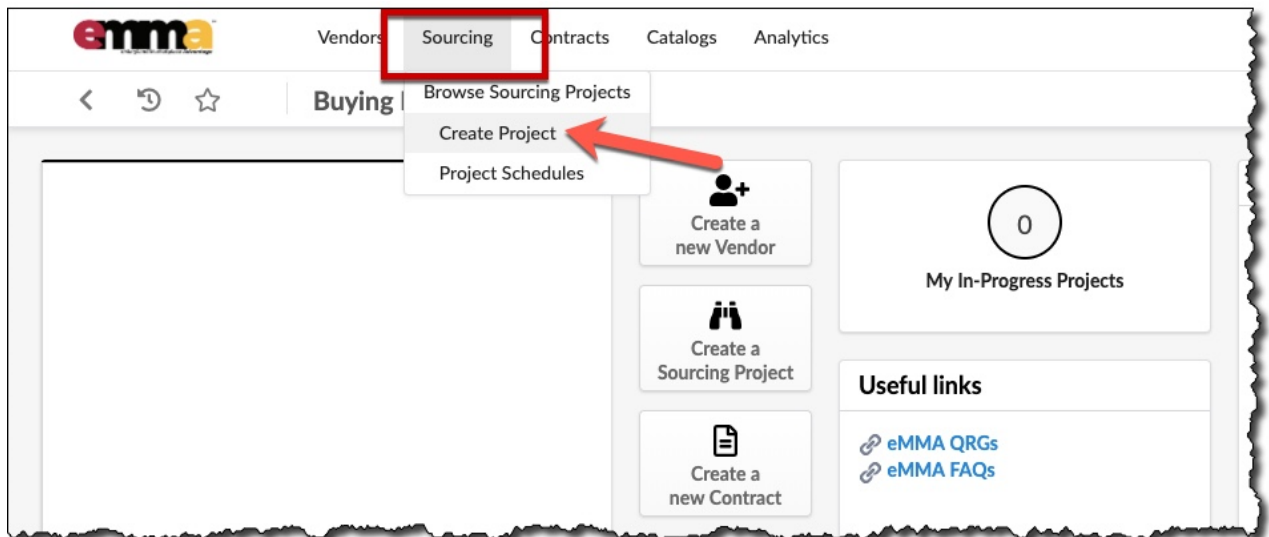


OVERVIEW

This Quick Reference Guide (QRG) is designed to help you (*Procurement Officers & Buyers*) understand how to create large Procurement *Request for Proposal (RFP): Double Envelope & Triple Envelope* Sourcing Solicitations in eMaryland Marketplace Advantage (eMMA).

SECTION 1: Navigate to the eMMA Home Screen

1. Access eMMA via SecureAuth or your login. IMPORTANT: For best results, access eMMA via Google Chrome.
2. Select the **Sourcing** module at the top of the home screen.
3. Click “**Create Project**” to continue.



SECTION 2: General Information

NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to proceed

Complete the required fields as indicated:

1. **Project Type:** Select the **RFP: Double Envelope Proposal** (Request for Proposal) option from the drop-down menu

NOTE: The RFP solicitation type is public and sealed. The Purchaser will be awarding to the lowest price bid. This solicitation type will allow for minimum qualification criteria to be flagged and disqualify bidders if they do not meet those criteria.

1. **Project Title:** Enter an appropriate title for the Sourcing Project
2. **Main Category:** Select a category from the drop-down or click "See All" to search commodities
3. **Issuing Agency:** Insert the name of the issuing agency of the Sourcing Project; the "See All" search function may also be utilized on this field
4. **Procurement Officer / Buyer:** Enter the name of the Procurement Officer / Buyer of the RFP Sourcing Project
5. **Project Start Date:** Enter the Project Start date

General Information

Alternate ID ⓘ	eMM Solicitation #	<input type="checkbox"/> Is a template
<input type="text"/>	<input type="text"/>	
Project Type *	Project Start Date *	Status
RFP: Double Envelope Proposal (LP) ▼	<input type="text" value="7/15/20"/>	In progress ▼ <input type="checkbox"/> Confidential Sourcing Project
Project Title *	Project End Date	
QRG RFP Double Envelope	<input type="text"/>	
Main Category *	Other Commodities	
6000000 - Education and Training Services ▼	<input type="text"/>	
Issuing Agency *	Other Organizations	
Motor Vehicle Administration (J04) ▼	<input type="text"/>	
Procurement Officer / Buyer *		
Bianca DI LUCENTE ▼		

➤ Once the required criteria is complete, click the "Save" button at the top of the screen

SECTION 3: Additional Information

NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to proceed

Complete the required fields as indicated:

1. **Federal Funding:** Indicate the status of the **Federal Funding**
2. **SBR Description:** Enter the **Small Business Reserve** description
3. **MBE Goal:** Indicate the **Minority Business Enterprise** Goal Status
4. **VSBE Goal:** Indicate the **Veteran-Owned Small Business Enterprise** Goal Status

➤ Once the required criteria is complete, click the “Save” button at the top of the screen

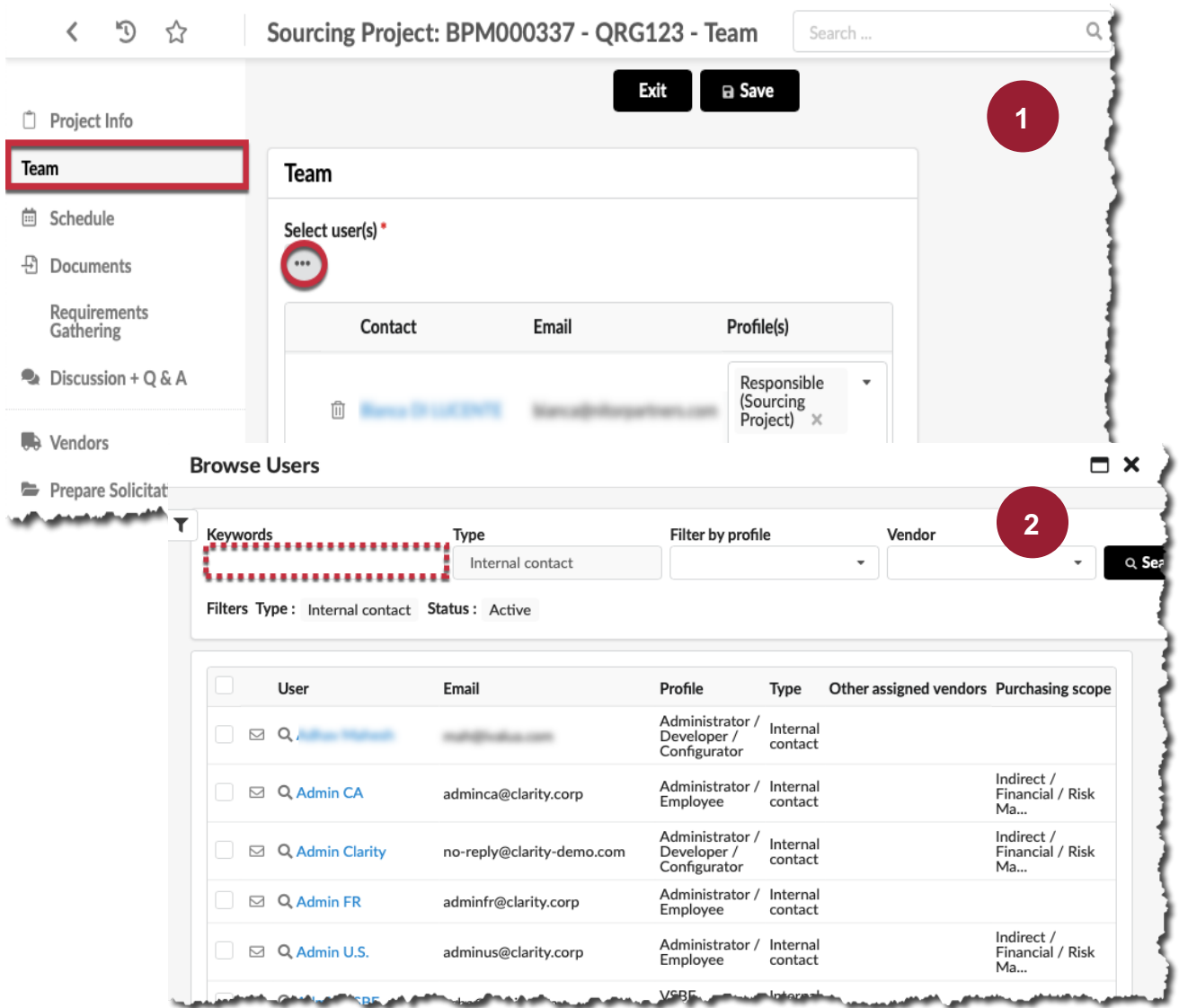
Additional Information

Federal Funding *	SBR Designation *	Project Estimate ⓘ	Project Cost Class
<input type="text" value="No"/>	<input type="text" value="No"/>	<input type="text"/>	<input type="text"/>
MBE Goal? *	MBE Participation (%)		
<input type="text" value="Yes"/>	<input type="text" value="25"/>		
<input type="checkbox"/> MBE Sub-Goal? ⓘ			
VSBE Goal? *	VSBE Participation (%)		
<input type="text" value="Yes"/>	<input type="text" value="25"/>		

SECTION 4: Create a Team

The Owner of the Sourcing Project may choose to create a **Team** for the specific event to drive transparency and collaboration through out the process.

1. Select the “**Team**” step from the menu bar on the left side of the screen; click the “**three-dot**” button to add team members.
2. Scroll the pop-up to browse and identify desired team members or use the text box” to search for a specific individual; select and close out of the screen.



Sourcing Project: BPM000337 - QRG123 - Team

Search ...

Exit Save

Project Info

Team

Schedule

Documents

Requirements Gathering

Discussion + Q & A

Vendors

Prepare Solicitation

Team

Select user(s) *

...

Contact	Email	Profile(s)
Remove from team	...	Responsible (Sourcing Project) x

Browse Users

Keywords Type Filter by profile Vendor

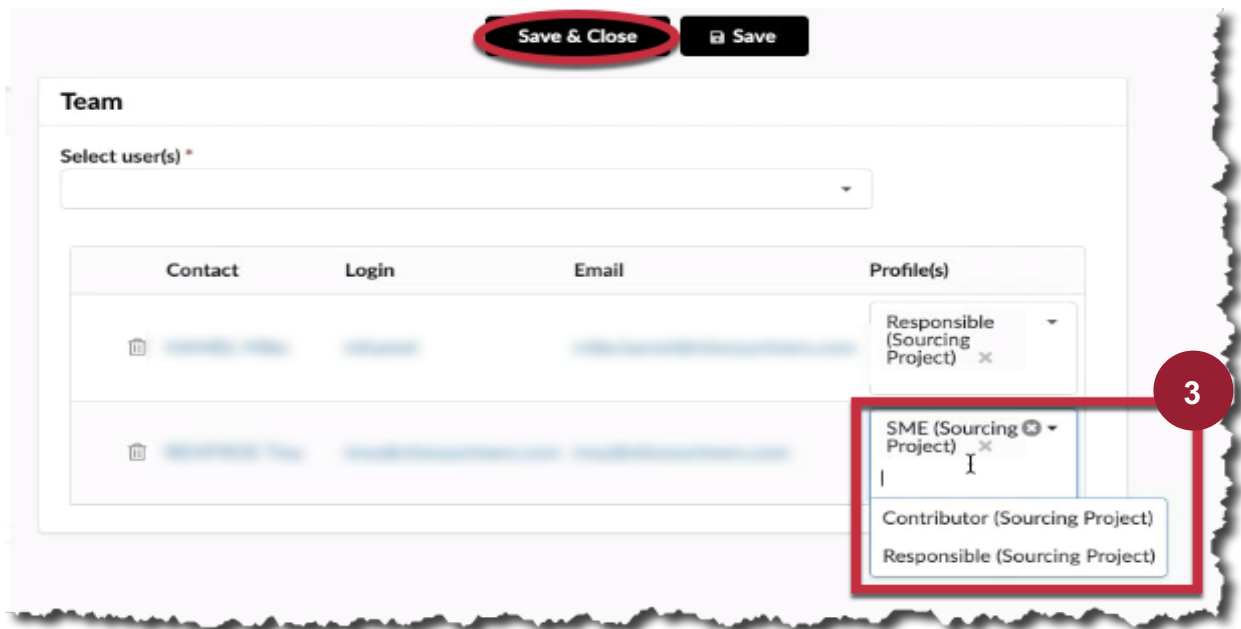
Internal contact

Filters Type: Internal contact Status: Active

User	Email	Profile	Type	Other assigned vendors	Purchasing scope
<input type="checkbox"/> Admin FR	adminfr@clarity.corp	Administrator / Employee	Internal contact		
<input type="checkbox"/> Admin CA	adminca@clarity.corp	Administrator / Employee	Internal contact		Indirect / Financial / Risk Ma...
<input type="checkbox"/> Admin Clarity	no-reply@clarity-demo.com	Administrator / Developer / Configurator	Internal contact		Indirect / Financial / Risk Ma...
<input type="checkbox"/> Admin U.S.	adminus@clarity.corp	Administrator / Employee	Internal contact		Indirect / Financial / Risk Ma...

SECTION 4: Create a Team (cont.)

3. After the team member/s are added; select their role as either a **SME** (*Subject Matter Expert*), **Contributor** or **Responsible** profile:
 - **SME:** *The SME acts with the authorization of hands on active “helper” role; note this is the default team role when a new member is selected*
 - **Contributor:** *The role of Contributor is that of a “watcher” whom will score and respond to solicitations*
 - **Responsible:** *The Responsible role is appropriate for the owner of the Sourcing Project*



Team

Select user(s) *

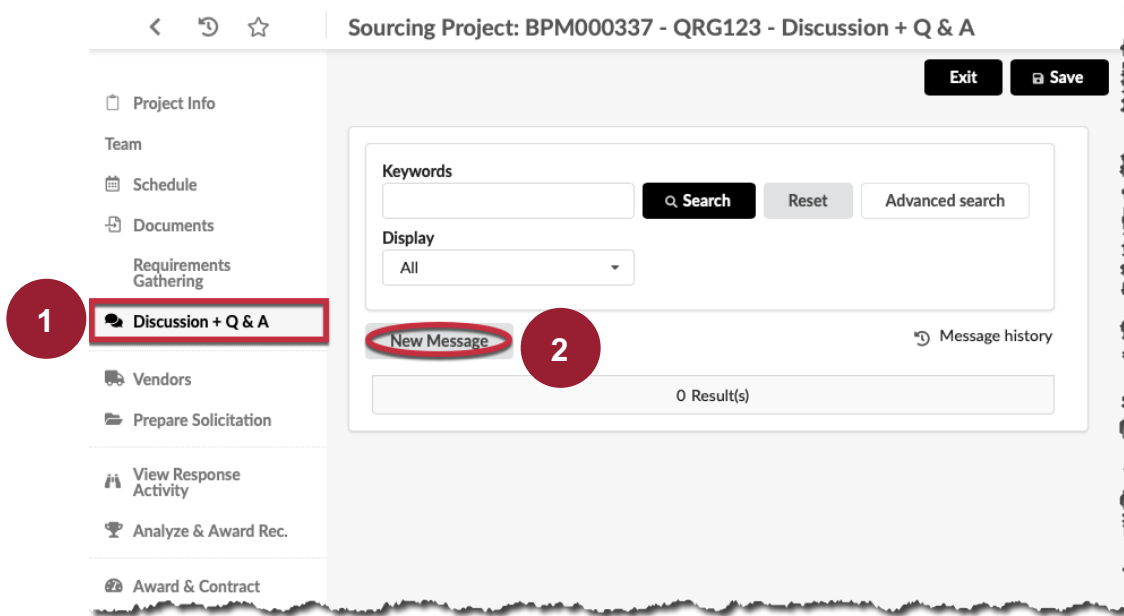
Contact	Login	Email	Profile(s)
			Responsible (Sourcing Project) x
			SME (Sourcing Project) x Contributor (Sourcing Project) Responsible (Sourcing Project)

- Once the required criteria is complete, click the “Save & Close” button at the top of the screen

SECTION 5: Discussion + Q & A

The eMMA Sourcing module allows for streamlined central point of collaboration amongst internal teams within the Sourcing Project via the **Discussion + Q & A** step.

1. Select the “**Discussion + Q & A**” step from the menu bar on the left side of the screen.
2. Click the “**New Message**” button to initiate a new message.

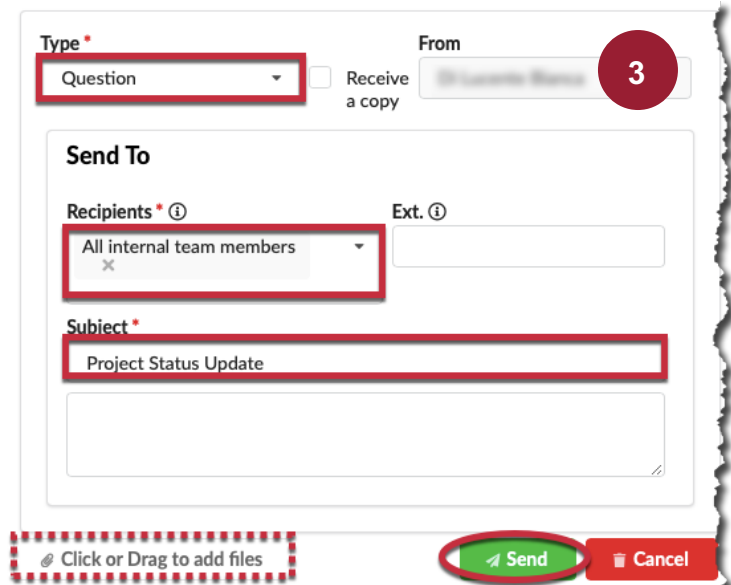


The screenshot shows the eMMA Sourcing Project interface for project BPM000337 - QRG123. The left sidebar contains a menu with options: Project Info, Team, Schedule, Documents, Requirements Gathering, **Discussion + Q & A** (highlighted with a red box and a red circle with the number 1), Vendors, Prepare Solicitation, View Response Activity, Analyze & Award Rec., and Award & Contract. The main content area shows a search bar with 'Keywords', a 'Search' button, a 'Reset' button, and an 'Advanced search' button. Below the search bar is a 'Display' dropdown menu set to 'All'. A 'New Message' button is highlighted with a red circle and a red circle with the number 2. To the right of the 'New Message' button is a 'Message history' link. At the bottom of the main content area, it says '0 Result(s)'.

NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to proceed

3. Enter the required information; select the internal recipients of the message, craft the message and click “**Send**”.
- **Recipients:** A message can be sent to a user outside of the system by entering an email address into the Recipient text box
 - **TIP:** Once the solicitation is live / active; the Discussion + Q & A may be utilized to communicate with vendors as well

OPTIONAL: Files may be attached by clicking or dragging where indicated in the lower left corner*



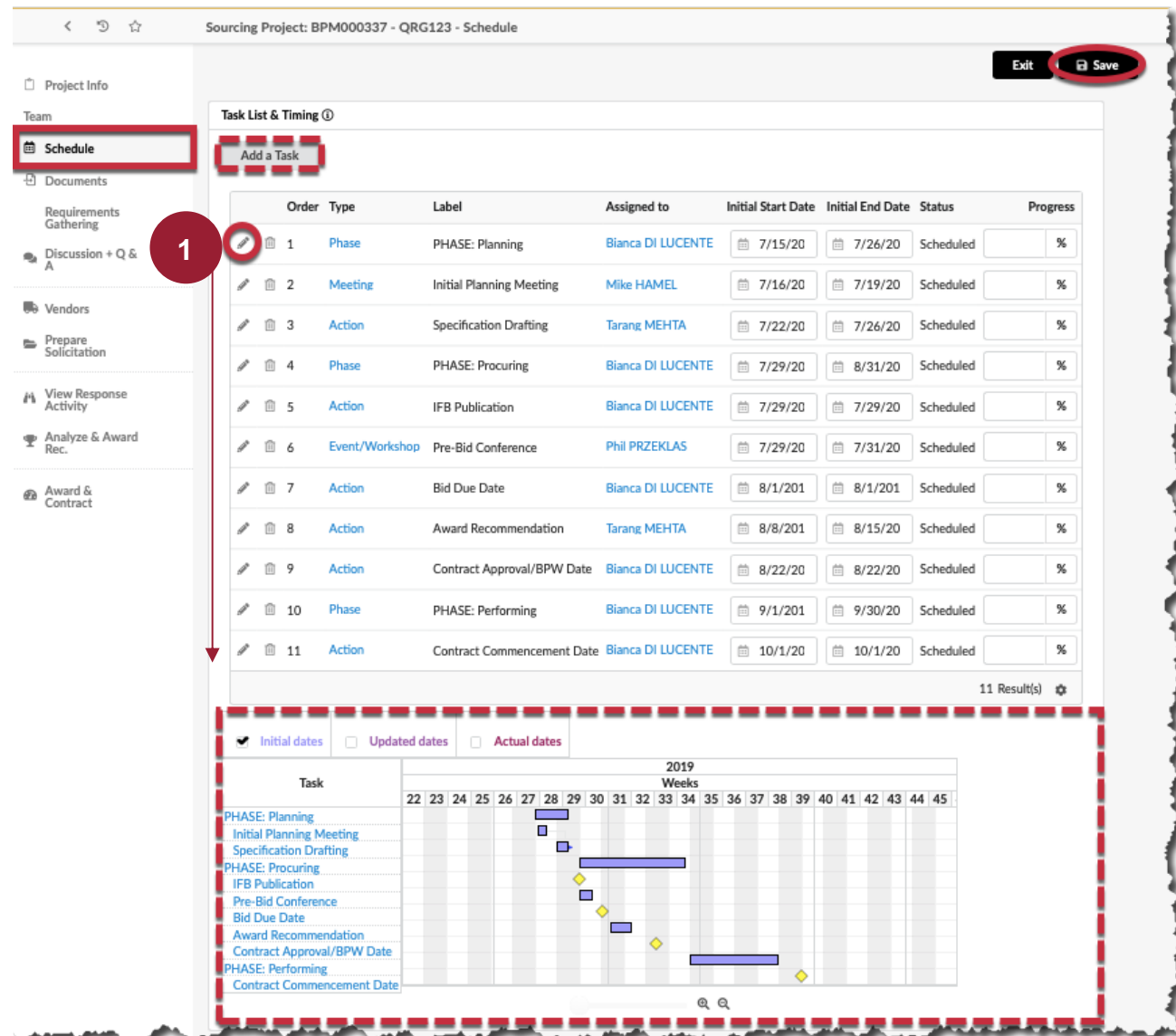
The screenshot shows the 'Send To' form in the eMMA Sourcing Project interface. The form has a 'Type' dropdown menu set to 'Question' (highlighted with a red box and a red circle with the number 3). To the right of the 'Type' dropdown is a 'From' dropdown menu set to 'Discussion + Q & A'. Below the 'Type' dropdown is a 'Receive a copy' checkbox. The 'Send To' section has a 'Recipients' dropdown menu set to 'All internal team members' (highlighted with a red box). To the right of the 'Recipients' dropdown is an 'Ext.' text box. Below the 'Recipients' dropdown is a 'Subject' text box set to 'Project Status Update' (highlighted with a red box). At the bottom of the form is a dashed red box with the text 'Click or Drag to add files'. To the right of the dashed red box is a green 'Send' button (highlighted with a red circle) and a red 'Cancel' button.

SECTION 6: Create a Sourcing Project Schedule

Access the Sourcing Project **Schedule** features by selecting the indicated step on the left side of the screen

1. Review the templated schedule **Phases, Meetings, Actions & Events**.
2. The Task line items may be edited by clicking the **pencil icon** on the left side of the column; continue to the next page of this guide to learn how to edit Tasks.

NOTE: The criteria defined within the **Task List & Timing** table will auto-populate the **"Initial Dates"** section of the GANTT chart as illustrated below



Sourcing Project: BPM000337 - QRG123 - Schedule

Exit Save

Project Info

Team

Schedule

Documents

Requirements Gathering

Discussion + Q & A

Vendors

Prepare Solicitation

View Response Activity

Analyze & Award Rec.

Award & Contract

Task List & Timing ⓘ

Add a Task

Order	Type	Label	Assigned to	Initial Start Date	Initial End Date	Status	Progress
1	Phase	PHASE: Planning	Bianca DI LUCENTE	7/15/20	7/26/20	Scheduled	%
2	Meeting	Initial Planning Meeting	Mike HAMEL	7/16/20	7/19/20	Scheduled	%
3	Action	Specification Drafting	Tarang MEHTA	7/22/20	7/26/20	Scheduled	%
4	Phase	PHASE: Procuring	Bianca DI LUCENTE	7/29/20	8/31/20	Scheduled	%
5	Action	IFB Publication	Bianca DI LUCENTE	7/29/20	7/29/20	Scheduled	%
6	Event/Workshop	Pre-Bid Conference	Phil PRZEKLAS	7/29/20	7/31/20	Scheduled	%
7	Action	Bid Due Date	Bianca DI LUCENTE	8/1/201	8/1/201	Scheduled	%
8	Action	Award Recommendation	Tarang MEHTA	8/8/201	8/15/20	Scheduled	%
9	Action	Contract Approval/BPW Date	Bianca DI LUCENTE	8/22/20	8/22/20	Scheduled	%
10	Phase	PHASE: Performing	Bianca DI LUCENTE	9/1/201	9/30/20	Scheduled	%
11	Action	Contract Commencement Date	Bianca DI LUCENTE	10/1/20	10/1/20	Scheduled	%

11 Result(s)

Initial dates Updated dates Actual dates

Task

2019 Weeks

22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45

PHASE: Planning

Initial Planning Meeting

Specification Drafting

PHASE: Procuring

IFB Publication

Pre-Bid Conference

Bid Due Date

Award Recommendation

Contract Approval/BPW Date

PHASE: Performing

Contract Commencement Date

➤ Once the required criteria is complete, click the **"Save"** button at the top of the screen

SECTION 6: Create a Sourcing Project Schedule – Editing Tasks (cont.)

To edit the Task line click the **pencil icon**;



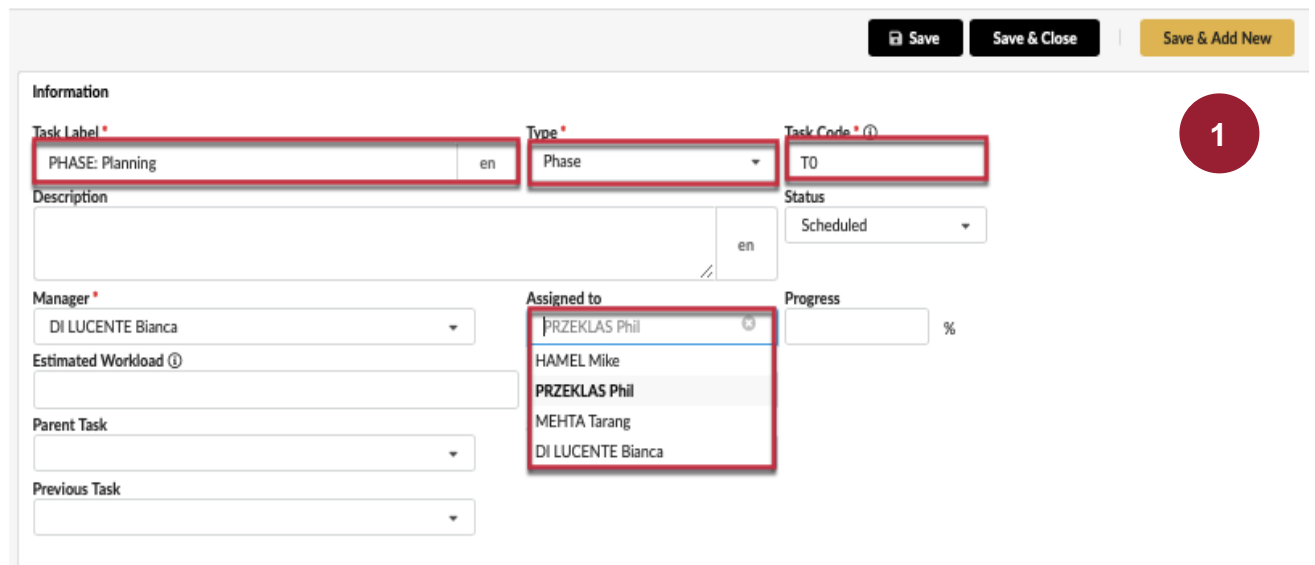
NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to proceed

1. Review the **Task Information** fields:

1. **Task Label:** Enter a clear and concise Task Label; additional details may be captured in the **Description** box
2. **Type:** Select the appropriate option from the drop-down menu (ex. Phase, Meeting, Action)
3. **Task Code:** This field is system generated
4. **Manager:** The Manager will default to the Sourcing Project Manager

NOTE: Tasks may only be **assigned** to internal team members as established within the “**Team**” step of the Sourcing Project

Edit task



Information

Task Label * PHASE: Planning en

Type * Phase

Task Code * (i) T0

Description

Manager * DI LUCENTE Bianca

Assigned to PRZEKLAS Phil, HAMEL Mike, PRZEKLAS Phil, MEHTA Tarang, DI LUCENTE Bianca

Status Scheduled

Progress %

Estimated Workload (i)

Parent Task

Previous Task

Save Save & Close Save & Add New

SECTION 6: Create a Sourcing Project Schedule – Editing Tasks (cont.)

2. Review the **Date Management** fields:
 - **Begin Date Initial Start Date**
 - **End Date Initial Start Date**
 - **Updated Dates:** *This field is to be updated in the future should the initial dates need revised*
 - **Actual Dates:** *This field is to capture the actual “true” dates*

Dates Management

	Begin date Initial Start Date *	End date Initial End Date *	Duration (days) Duration
Initial	<input type="text" value="7/15/20"/>	<input type="text" value="7/26/20"/>	<input type="text" value="11"/>
Updated	<input type="text"/>	<input type="text"/>	<input type="text"/>
Actual	<input type="text"/>	<input type="text"/>	<input type="text"/>

Comments

Comment

Click or Drag to add files
Save

3. Review the **Sub Tasks** for the specified line item located at the bottom of the *Task Editing pop-up screen*.

Type	Description
Meeting	Identify what you want to procure.
Action	Prepare specifications and determine the means for advertising and distributing the solicitation. Develop a direct solicitation list. Hold PRG, set MBE and VSBE goals and MBE subgoals, as appropriate. Work with AAG as needed. Obtain internal agency approvals. (Program, AAG, etc.)

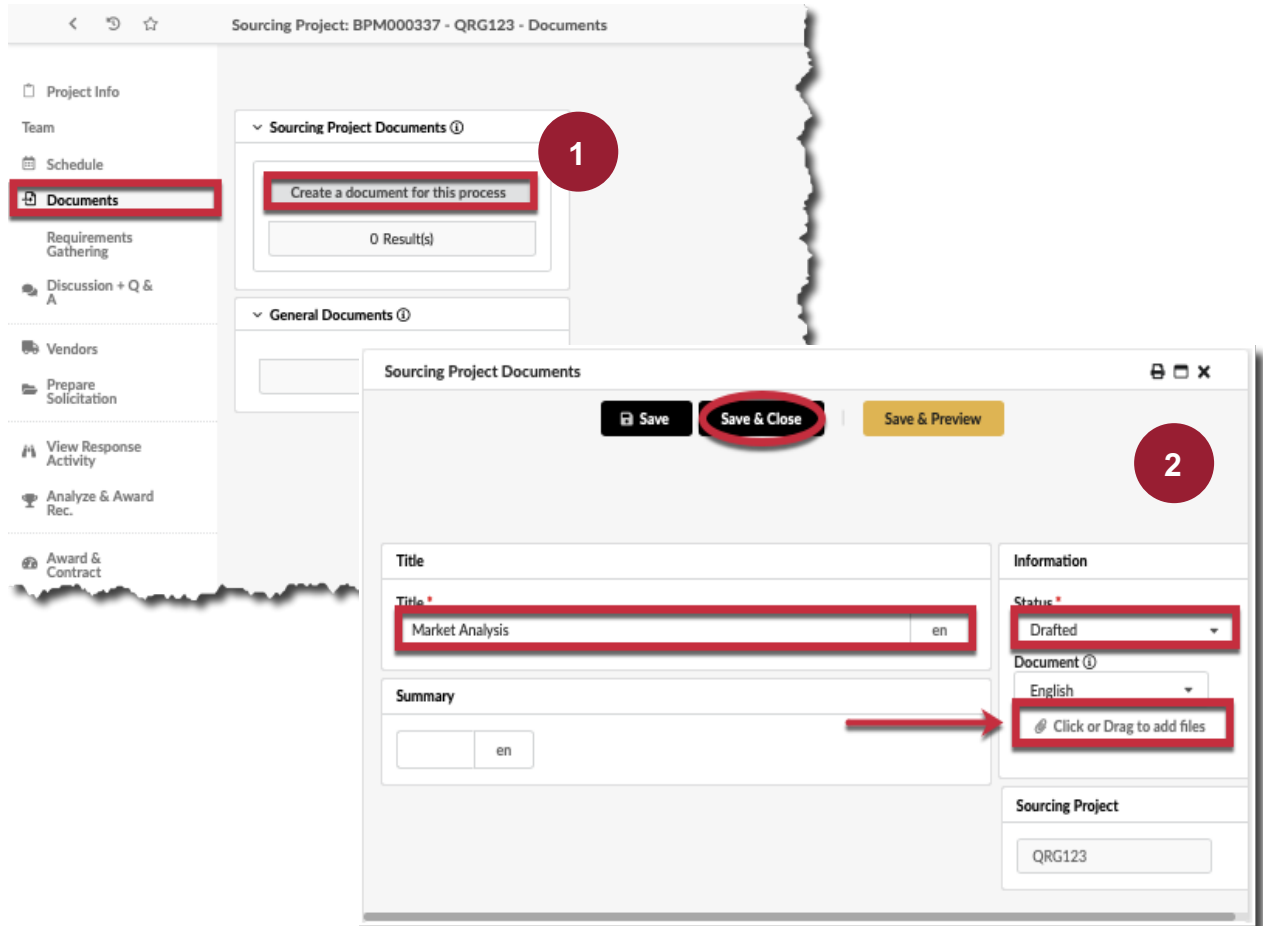
- Click the **“Save & Close”** button at the top of the screen to incorporate all edits and return to the **Schedule** home screen



SECTION 7: Add Documents

To add **Documents** to the Sourcing Project select the step on the left side of the screen

1. Click the **“Crate a document for this process”** button to add a document to the Sourcing Project.



Sourcing Project: BPM000337 - QRG123 - Documents

Project Info

Team

Schedule

Documents

Requirements Gathering

Discussion + Q & A

Vendors

Prepare Solicitation

View Response Activity

Analyze & Award Rec.

Award & Contract

Sourcing Project Documents

0 Results(s)

General Documents

Sourcing Project Documents

Save Save & Close Save & Preview

Title

Title *

Market Analysis en

Summary

en

Information

Status *

Drafted

Document

English

Click or Drag to add files

Sourcing Project

QRG123

2. Within the pop-up window, complete all required fields as marked with the red asterisk and click or drag the desired file for upload where indicated by the arrow

- Click the **“Save & Close”** button at the top of the screen to incorporate all edits and return to the **Documents** home screen

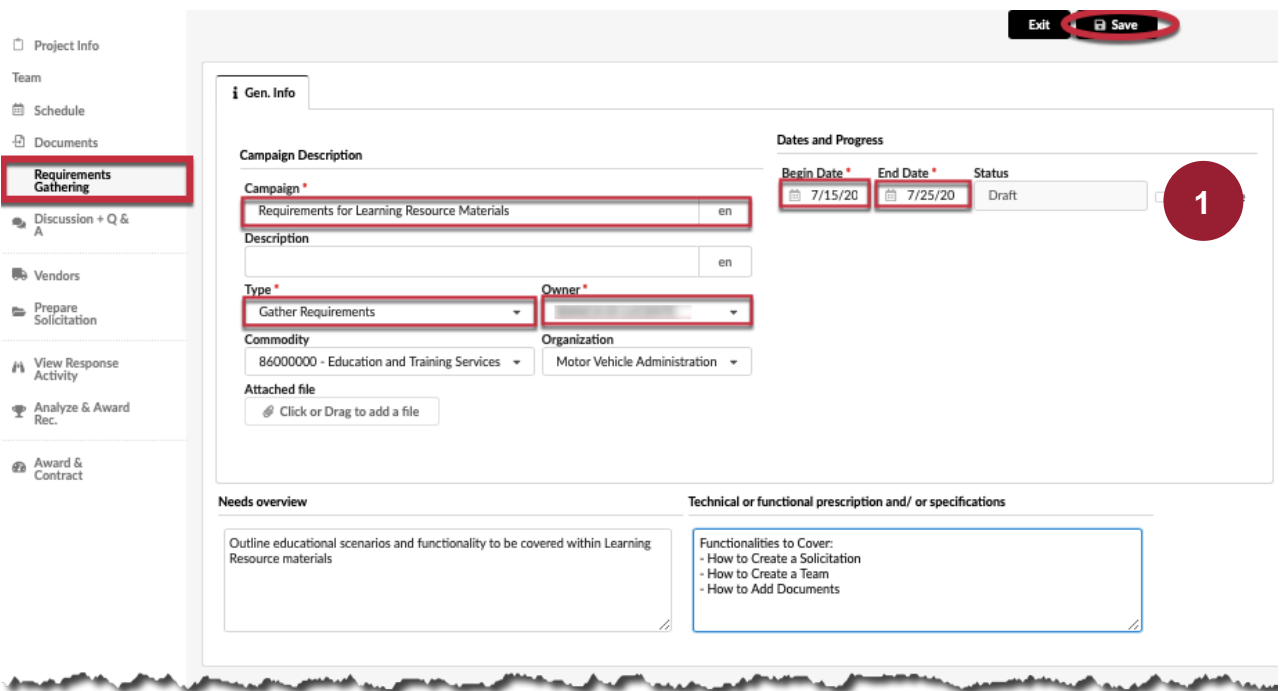
NOTE: The Documents added to this section are only visible by the internal team to the Sourcing Project. This is an appropriate place to store such items as market analysis, research etc. These documents can be copied to the solicitation and shared with vendors if desired.

SECTION 8: Requirements Gathering

Requirements Gathering acts as a tool to create an internal questionnaire pertaining to the needs and criteria of the Sourcing Project. Typically the Requirements Gathering questionnaire would be targeted towards internal stakeholders such as the team SME's or Contributors.

1. To add **Requirements Gathering** to the Sourcing Project select the step on the left side of the screen and complete the required fields.

NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to proceed



Exit Save

Gen. Info

Campaign Description

Campaign *
Requirements for Learning Resource Materials en

Description
en

Type *
Gather Requirements

Owner *
Motor Vehicle Administration

Commodity
86000000 - Education and Training Services

Organization
Motor Vehicle Administration

Dates and Progress

Begin Date *
7/15/20

End Date *
7/25/20

Status
Draft

Needs overview

Outline educational scenarios and functionality to be covered within Learning Resource materials

Technical or functional prescription and/or specifications

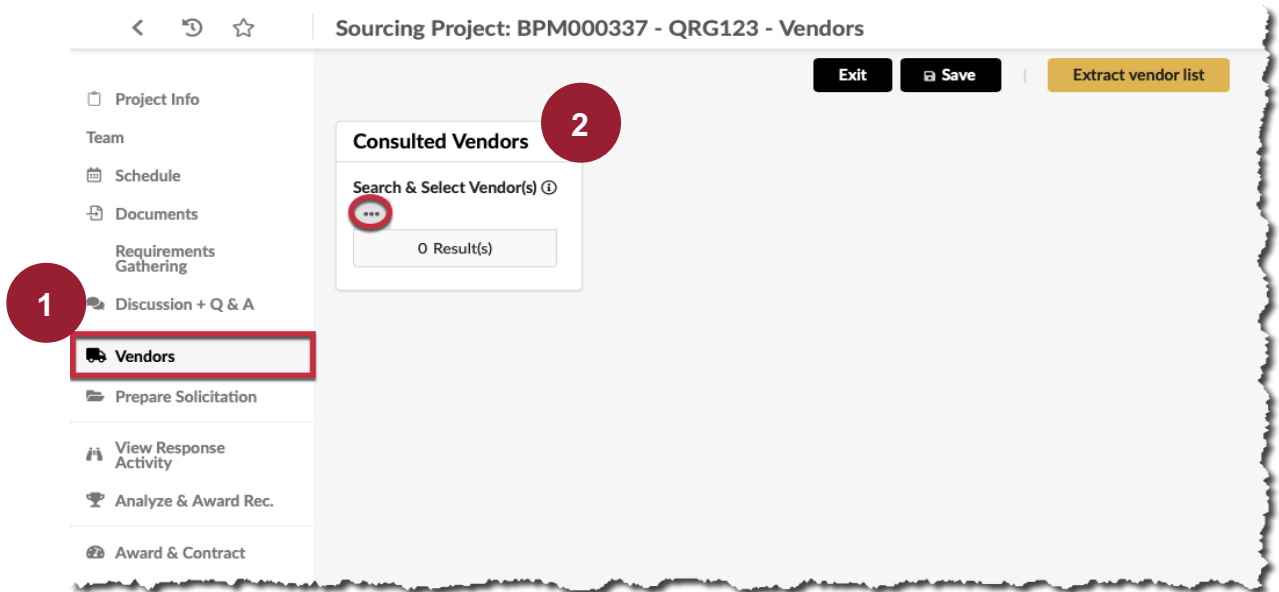
Functionalities to Cover:
- How to Create a Solicitation
- How to Create a Team
- How to Add Documents

- Once the required criteria is complete, click the “Save” button at the top of the screen

SECTION 9: Select Vendors

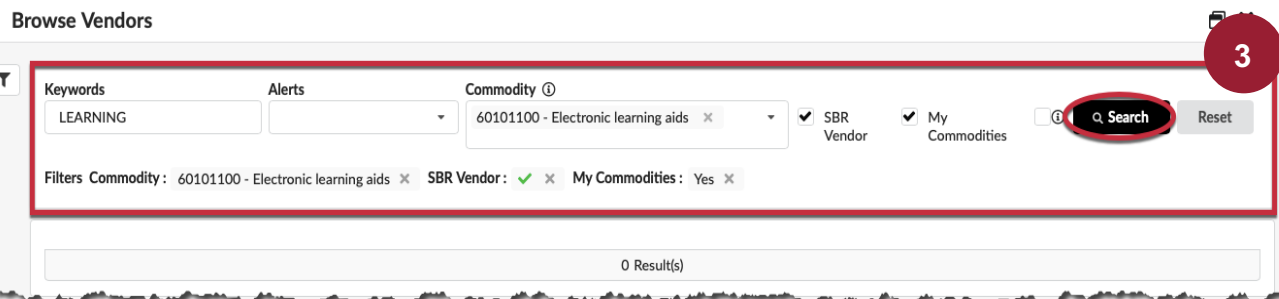
By selecting the **Vendors** step on the left side of the screen, the Project Owner will be able to search for and browse **Consulted Vendors** for the RFP Sourcing Project based on identified criteria and requirements.

1. Select the “**Vendors**” step from the menu bar on the left side of the screen.
2. click the “**three-dot**” button to search and select **Vendors** for the Sourcing Project.



NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to proceed

3. Enter the necessary vendor search criteria to browse potential options; note the options to include SBR and commodity driven criteria. Click “**Search**” to review the results and select the consulted vendors accordingly. At least one vendor must be selected to publish the RFP Sourcing Project.



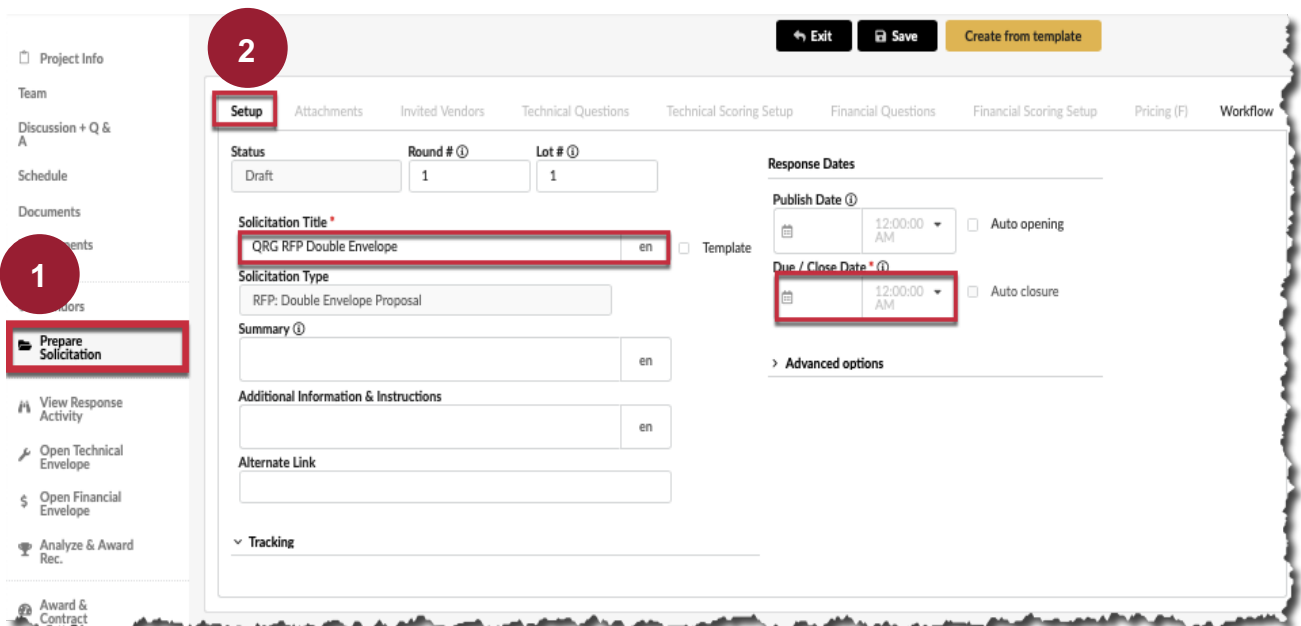
IMPORTANT: For solicitations that require a longer period of time, the list of vendors receiving notifications may need to be updated/refreshed to capture newly registered vendors for a specific category code.

SECTION 10: Prepare Solicitation - Setup

Utilize the **Prepare Solicitation** step on the left side of the screen in order to define the identified criteria and requirements for the RFP Sourcing Project solicitation.

NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to proceed

1. Select the “**Prepare Solicitation**” step from the menu bar on the left side of the screen.
2. Enter the required criteria to complete the **Solicitation** form:
 - **Solicitation Title:** Enter an appropriate Solicitation Title for the Sourcing Project
 - **Solicitation Type:** For this scenario the **RFP** type will default from the Project Info settings
 - **Due / Close Date:** Enter the date when Bidders/Vendors when can no longer submit responses.

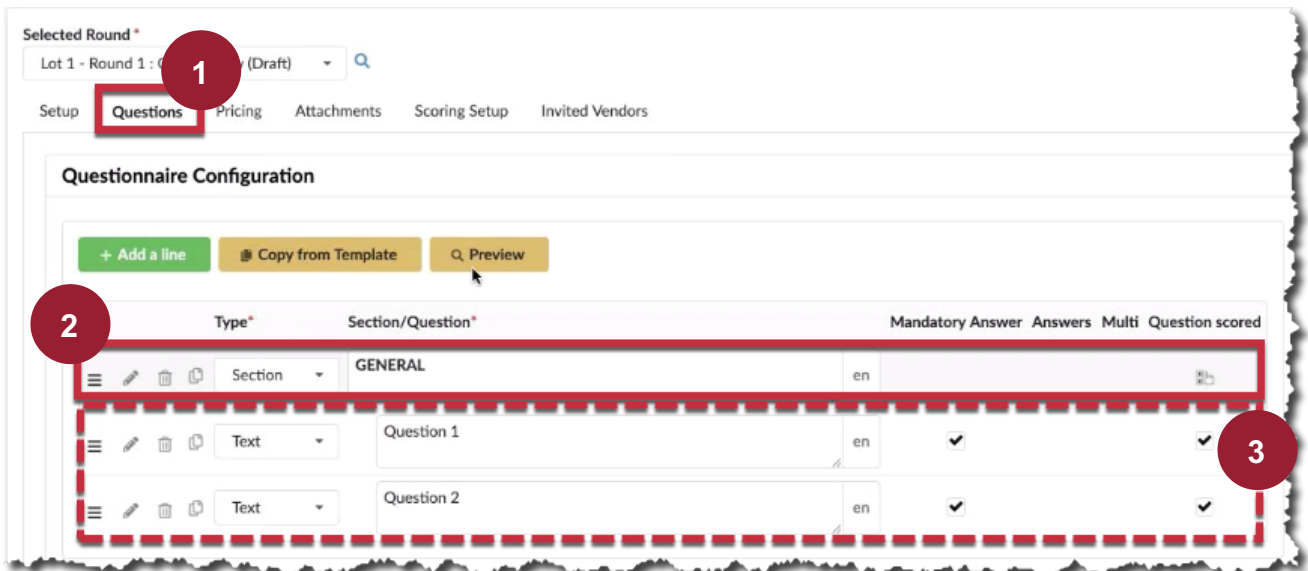


➤ Once the required criteria is complete, click the “Save” button at the top of the screen

SECTION 10: Prepare Solicitation - Questions

1. Within the **Prepare Solicitation** step, select the **Questions** tab from the top of the screen;
2. Create a **"Section"** to categorize a set of Questions
3. Enter the required Questions as appropriate to each section of the RFP solicitation
 - When entering the Questions, ensure to check the **"Question scored"** box to enable the scoring functionality for that line item.

NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to proceed



The screenshot shows the 'Questions' tab in the 'Prepare Solicitation' step. The 'Selected Round' is 'Lot 1 - Round 1: Questions (Draft)'. The 'Questions' tab is highlighted with a red box and a callout '1'. Below the tabs is the 'Questionnaire Configuration' section. It includes buttons for '+ Add a line', 'Copy from Template', and 'Preview'. A table with columns 'Type*', 'Section/Question*', 'Mandatory Answer', 'Answers', 'Multi', and 'Question scored' is shown. A red box highlights the first row, which is a 'Section' named 'GENERAL', with a callout '2'. Below it are two rows for 'Text' questions, 'Question 1' and 'Question 2', both with 'Question scored' checked, with a callout '3'.

Type*	Section/Question*	Mandatory Answer	Answers	Multi	Question scored
Section	GENERAL	en			
Text	Question 1	en	✓		✓
Text	Question 2	en	✓		✓

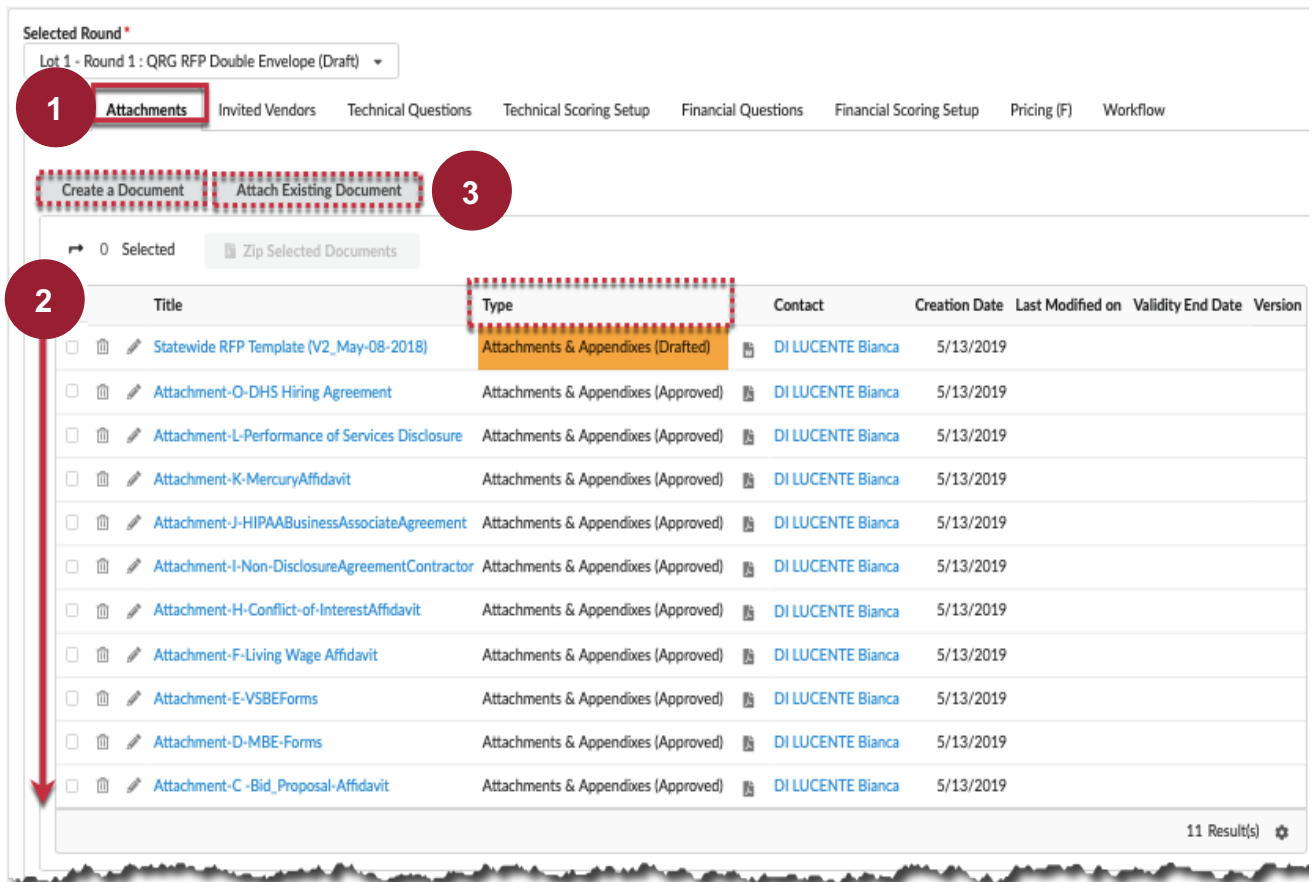
NOTE: All questions are required to be housed within a section

- Once the required criteria is complete, click the **"Save"** button at the top of the screen

SECTION 10: Prepare Solicitation - Attachments

1. Within the **Prepare Solicitation** step, select the **Attachments** tab from the top of the screen.
 2. Review and select the appropriate **Attachments & Appendixes** for given RFP scenario by checking the boxes.
- **Optional Actions:**
 - **Editing:** Line items can be edited by clicking the pencil icon
 - **Create a New Document:** Click the “**Create a Document**” button to create a net new Document
 - **Attach Existing Document:** Click the “**Attach Existing Document**” button to include an attachment from the **Documents** step of the RFP Solicitation

NOTE: Documents in **DRAFT** status type (as seen in gold) will not be visible to vendors. Documents must be in an **Approved** status type in order to be viewed by vendors. The status type can be edited by clicking the line item pencil icon and selected “Approved” from the Status selection drop-down menu located under “Information”.



The screenshot shows the 'Attachments' tab selected in the top navigation bar. Below the navigation bar, there are two buttons: 'Create a Document' and 'Attach Existing Document'. A table of attachments is displayed below these buttons. The table has columns for Title, Type, Contact, Creation Date, Last Modified on, Validity End Date, and Version. The first row is highlighted in gold, indicating it is in 'Draft' status. A red arrow points from the 'Attachments' tab to the table, and a red circle highlights the 'Type' column header.

Title	Type	Contact	Creation Date	Last Modified on	Validity End Date	Version
Statewide RFP Template (V2_May-08-2018)	Attachments & Appendixes (Drafted)	DI LUCENTE Bianca	5/13/2019			
Attachment-O-DHS Hiring Agreement	Attachments & Appendixes (Approved)	DI LUCENTE Bianca	5/13/2019			
Attachment-L-Performance of Services Disclosure	Attachments & Appendixes (Approved)	DI LUCENTE Bianca	5/13/2019			
Attachment-K-Mercury Affidavit	Attachments & Appendixes (Approved)	DI LUCENTE Bianca	5/13/2019			
Attachment-J-HIPAA Business Associate Agreement	Attachments & Appendixes (Approved)	DI LUCENTE Bianca	5/13/2019			
Attachment-I-Non-Disclosure Agreement Contractor	Attachments & Appendixes (Approved)	DI LUCENTE Bianca	5/13/2019			
Attachment-H-Conflict-of-Interest Affidavit	Attachments & Appendixes (Approved)	DI LUCENTE Bianca	5/13/2019			
Attachment-F-Living Wage Affidavit	Attachments & Appendixes (Approved)	DI LUCENTE Bianca	5/13/2019			
Attachment-E-VSBE Forms	Attachments & Appendixes (Approved)	DI LUCENTE Bianca	5/13/2019			
Attachment-D-MBE-Forms	Attachments & Appendixes (Approved)	DI LUCENTE Bianca	5/13/2019			
Attachment-C-Bid_Proposal-Affidavit	Attachments & Appendixes (Approved)	DI LUCENTE Bianca	5/13/2019			

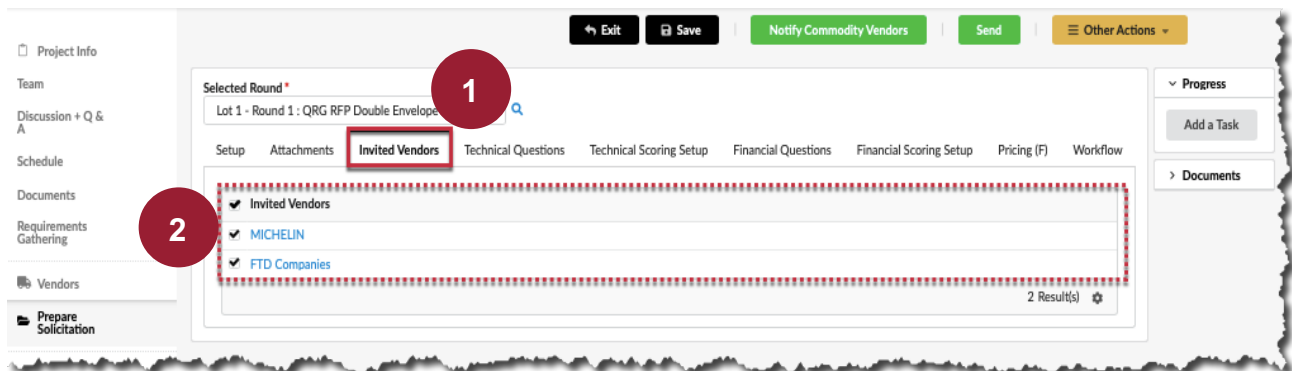
11 Result(s)

➤ Once the required criteria is complete, click the “Save” button at the top of the screen

SECTION 10: Prepare Solicitation – Invited Vendors

1. Within the **Prepare Solicitation** step, select the **Invited Vendors** tab from the top of the screen.
2. Review the **Vendors** as selected within the previous Vendors step (see *Section 9 of this Guide*)
 - Check the box of all Vendor Recipients to receive the Solicitation

NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to proceed



The screenshot shows the 'Prepare Solicitation' interface. At the top, there are buttons for 'Exit', 'Save', 'Notify Commodity Vendors', 'Send', and 'Other Actions'. Below these is a 'Selected Round' dropdown menu. The 'Invited Vendors' tab is selected and highlighted with a red circle and the number '1'. Below the tab, there is a list of vendors with checkboxes. The list is enclosed in a red dashed border, and a red circle with the number '2' highlights it. The vendors listed are 'MICHELIN' and 'FTD Companies'. At the bottom right of the list, it says '2 Result(s)'. On the left side, there is a sidebar with various navigation options: Project Info, Team, Discussion + Q & A, Schedule, Documents, Requirements Gathering, Vendors, and Prepare Solicitation. The 'Prepare Solicitation' option is currently selected.

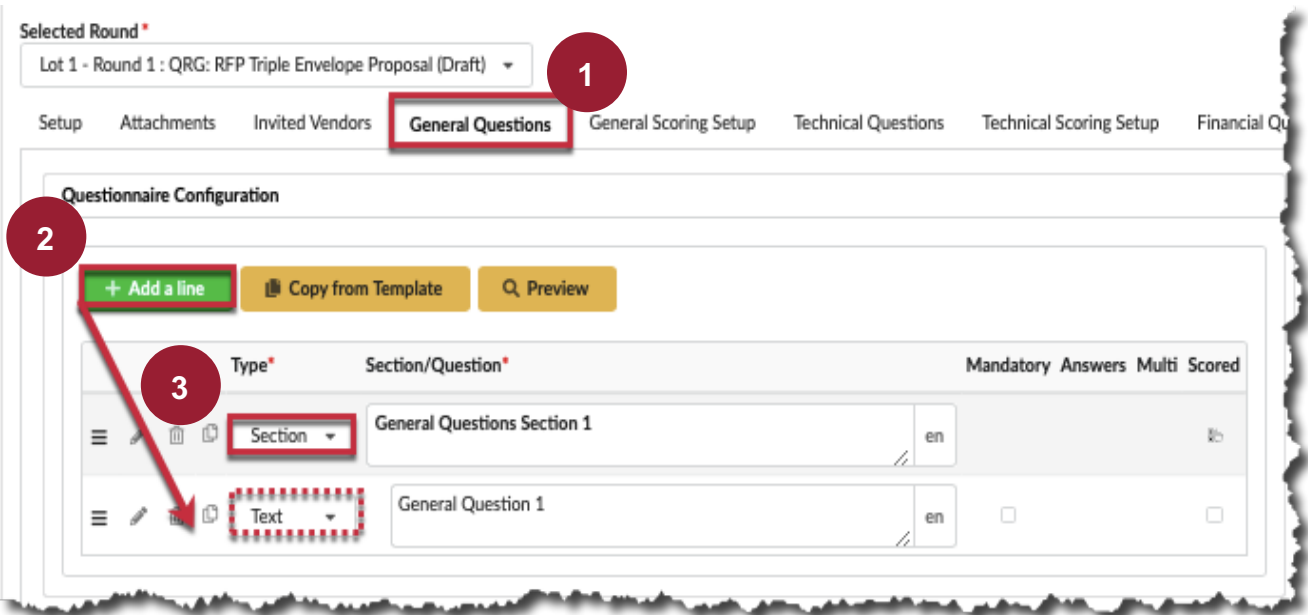
- Once the required criteria is complete, click the “Save” button at the top of the screen

SECTION 10: Prepare Solicitation – General Questions (Envelope 1)

In the Prepare Solicitation step, **General Question** criteria is the first envelope in the process of a **Triple Envelope** bid. Notate that the **General Questions and the associated scoring activities** are not included in a *Double Envelope* scenario.

1. Within the **Prepare Solicitation** step, select the **General Questions** tab from the top of the screen.
2. Click the “+ Add a line” button to add a line item to the Questionnaire.
3. Each Questionnaire must begin with a parent **Section**; under each Section sub-sections and questions may be added.

NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to proceed



Selected Round *

Lot 1 - Round 1 : QRG: RFP Triple Envelope Proposal (Draft) ▼

Setup Attachments Invited Vendors **General Questions** General Scoring Setup Technical Questions Technical Scoring Setup Financial Q

Questionnaire Configuration

+ Add a line Copy from Template Preview

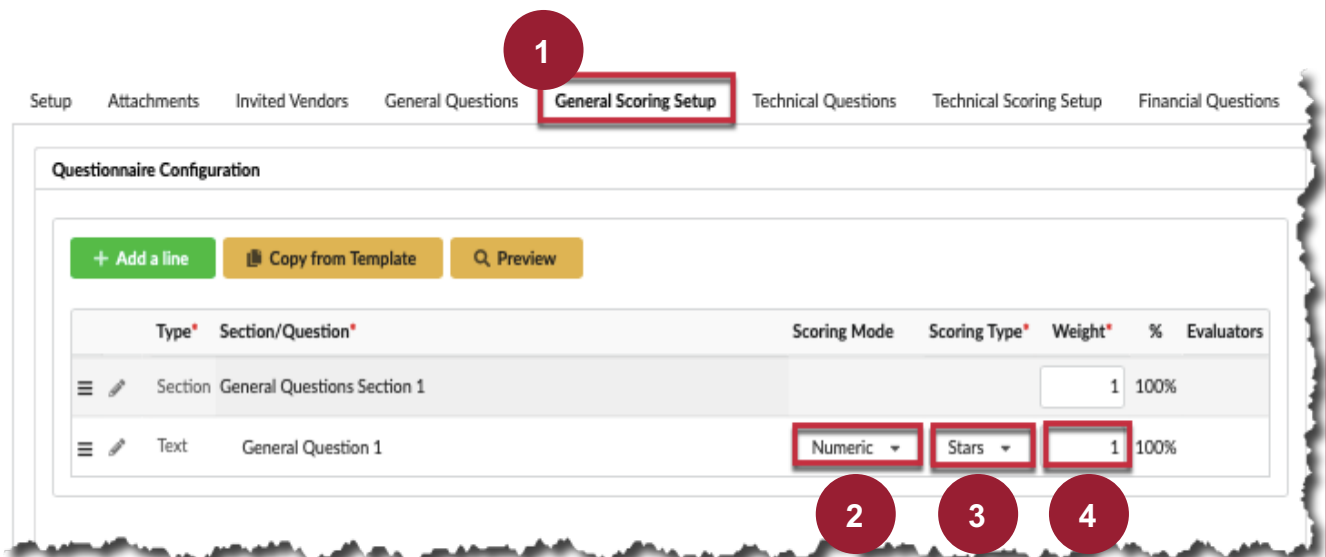
Type*	Section/Question*	Mandatory	Answers	Multi	Scored
Section	General Questions Section 1	en			
Text	General Question 1	en	<input type="checkbox"/>		<input type="checkbox"/>

NOTE: The check boxes on the right side of the line items need to be managed in order to determine what Sections / Questions are mandatory and / or scorable

SECTION 10: Prepare Solicitation – General Scoring Setup (Envelope 1)

1. Within the **Prepare Solicitation** step, select the **General Scoring Setup** tab from the top of the screen.
2. Click the “**Scoring Mode**” and select the appropriate value.
3. Select the “**Scoring Type**” value from the drop-down menu as appropriate.
4. Enter the **Weight** value.

NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to proceed



Setup Attachments Invited Vendors General Questions **General Scoring Setup** Technical Questions Technical Scoring Setup Financial Questions

Questionnaire Configuration

+ Add a line Copy from Template Preview

Type*	Section/Question*	Scoring Mode	Scoring Type*	Weight*	%	Evaluators
Section	General Questions Section 1			1	100%	
Text	General Question 1	Numeric	Stars	1	100%	

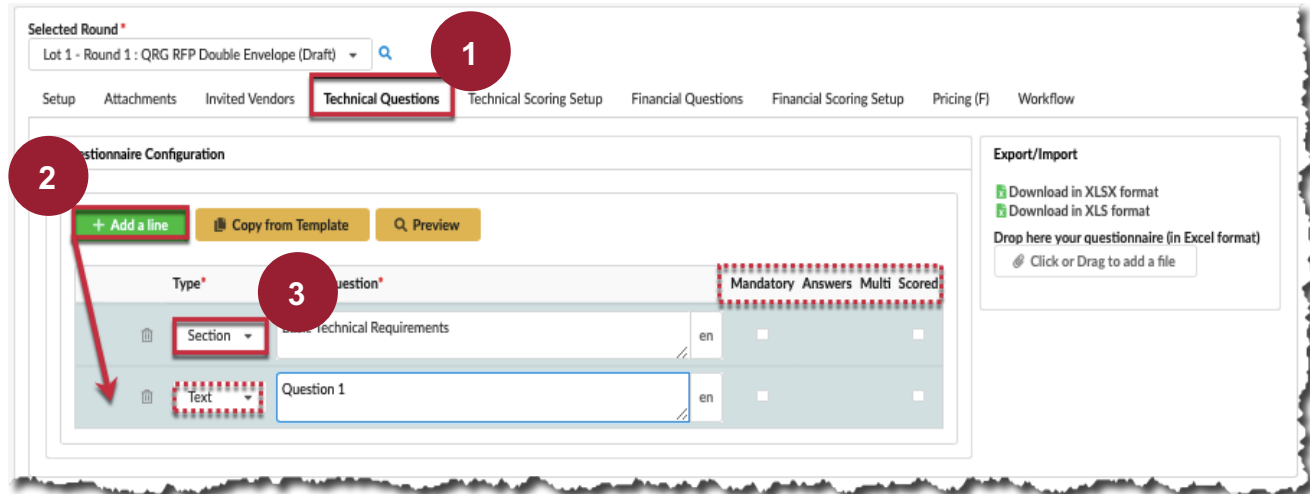
➤ Once the required criteria is complete, click the “Save” button at the top of the screen

SECTION 10: Prepare Solicitation – Technical Questions (Envelope 2)

In the Prepare Solicitation step, **Technical Question** criteria is the first envelope in the process of a **Double Envelope** bid. In a **Triple Envelope** bid, Technical Questions and associated scoring activities are associated with envelope 2 of 3.

1. Within the **Prepare Solicitation** step, select the **Technical Questions** tab from the top of the screen.
2. Click the “+ Add a line” button to add a line item to the Questionnaire.
3. Each Questionnaire must begin with a parent **Section**; under each Section sub-sections and questions may be added.

NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to proceed



The screenshot shows the 'Technical Questions' tab in the eMMA interface. Callout 1 points to the 'Technical Questions' tab. Callout 2 points to the '+ Add a line' button. Callout 3 points to the 'Section' dropdown in the 'Type' column of the questionnaire table. The table has columns for 'Type', 'Question', 'Mandatory', 'Answers', 'Multi', and 'Scored'. The first row is a 'Section' type with the question 'Technical Requirements'. The second row is a 'Text' type with the question 'Question 1'. The 'Mandatory', 'Answers', 'Multi', and 'Scored' columns for both rows have checkboxes. To the right of the table is an 'Export/Import' section with options to download in XLSX or XLS format, and a drop area for uploading a questionnaire in Excel format.


NOTE: The check boxes on the right side of the line items need to be managed in order to determine what Sections / Questions are mandatory and / or scorable

SECTION 10: Prepare Solicitation – Technical Scoring Setup (Envelope 2)

1. Within the **Prepare Solicitation** step, select the **Technical Scoring Setup** tab from the top of the screen.
2. Click the “**Scoring Mode**” and select the appropriate value.
3. Select the “**Scoring Type**” value from the drop-down menu as appropriate.
4. Enter the **Weight** value.




NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to proceed




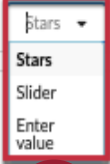
Selected Round *

Lot 1 - Round 1 : QRG RFP Double Envelope (Draft) 

Setup Attachments Invited Vendors Technical Questions **Technical Scoring Setup** Financial Questions Financial Scoring Setup Pricing (F) Workflow

Questionnaire Configuration

Type*	Section/Question*	Scoring Mode	Scoring Type*	Weight*	%	Evaluators
 Section	Base Technical Requirements			1	100%	
 Text	Question 1			1	100%	

- Once the required criteria is complete, click the “Save” button at the top of the screen


SECTION 10: Prepare Solicitation – Financial Questions (Envelope 3)

In the Prepare Solicitation step, **Financial Question** criteria is the second envelope in the process of a **Double Envelope** bid. In a **Triple Envelope** bid, Financial Questions and associated scoring activities are associated with envelope 3 of 3.

1. Within the **Prepare Solicitation** step, select the **Financial Questions** tab from the top of the screen.
2. Click the “+ Add a line” button to add a line item to the Questionnaire.
3. Each Questionnaire must begin with a parent **Section**; under each Section sub-sections and questions may be added.




NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to

Selected Round *

Lot 1 - Round 1 : QRG RFP Double Envelope (Draft) 

Setup Attachments Invited Vendors Technical Questions Technical Scoring Setup **Financial Questions** Financial Scoring Setup Pricing

Questionnaire Configuration

Type*	Section/Question*		Mandatory	Answers	Multi	Scored
Section	Base Financial Requirements	en	<input type="checkbox"/>			<input type="checkbox"/>
Text	Financial Question 1	en	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>

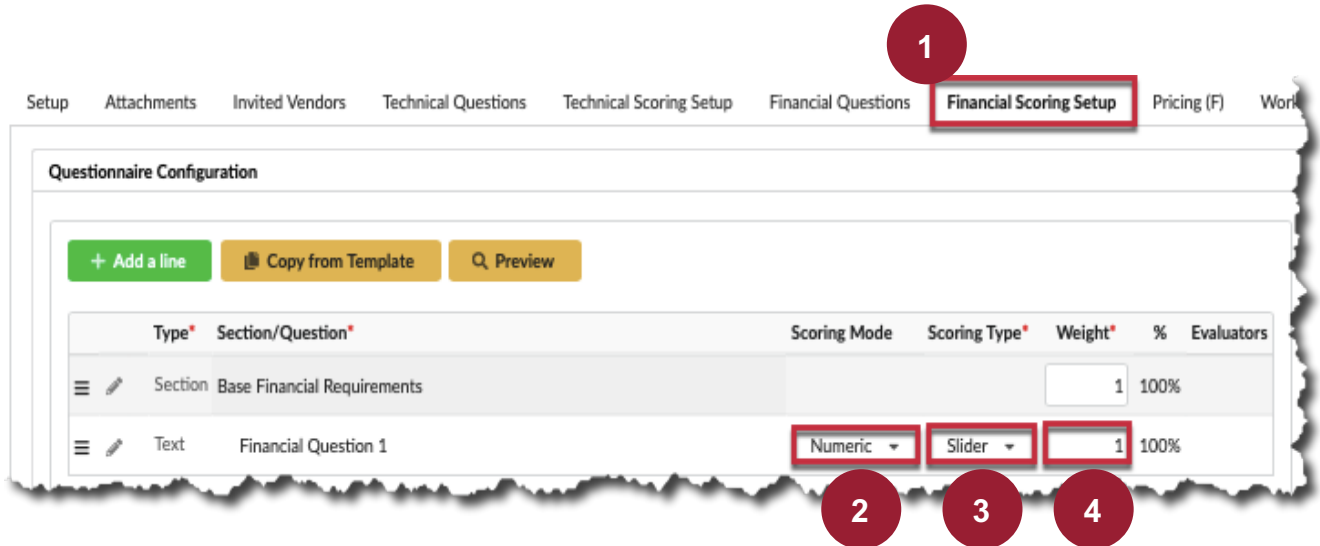
NOTE: The check boxes on the right side of the line items need to be managed in order to determine what Sections / Questions are mandatory and / or scorable

- Once the required criteria is complete, click the “Save” button at the top of the screen

SECTION 10: Prepare Solicitation – Financial Scoring Setup (Envelope 3)

1. Within the **Prepare Solicitation** step, select the **Financial Scoring Setup** tab from the top of the screen.
2. Click the “**Scoring Mode**” and select the appropriate value.
3. Select the “**Scoring Type**” value from the drop-down menu as appropriate.
4. Enter the **Weight** value.

NOTE: All fields marked with a red asterisk to the right are required and must be completed in order to proceed



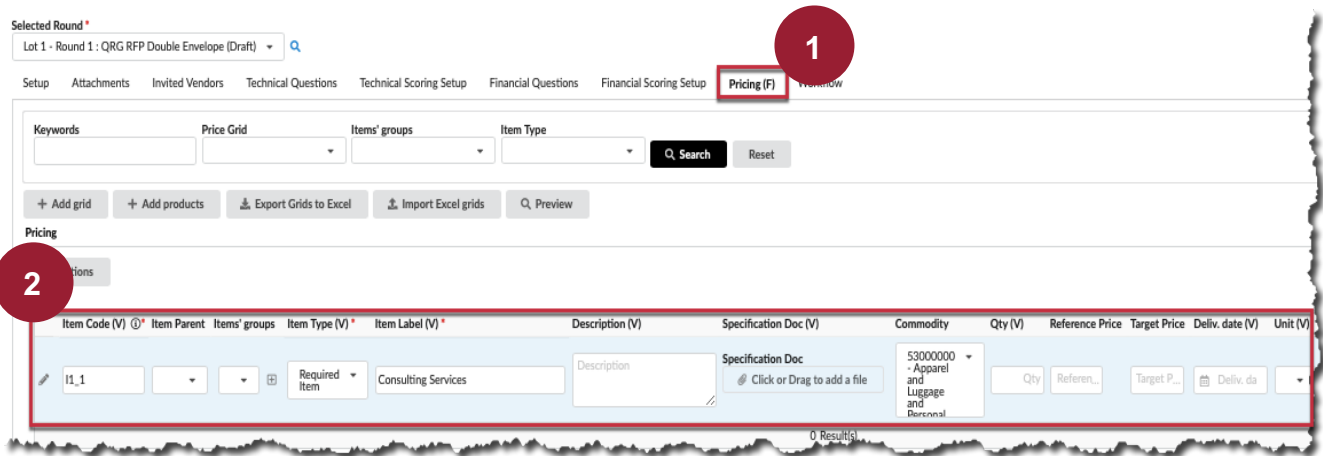
The screenshot shows the 'Financial Scoring Setup' tab selected in the top navigation bar. Below the navigation bar is the 'Questionnaire Configuration' section. It contains three buttons: '+ Add a line', 'Copy from Template', and 'Preview'. Below these buttons is a table with the following columns: Type*, Section/Question*, Scoring Mode, Scoring Type*, Weight*, %, and Evaluators. The table has two rows. The first row is a section header: 'Section' for Type, 'Base Financial Requirements' for Section/Question, and '1' for Weight, with a percentage of '100%'. The second row is a question: 'Text' for Type, 'Financial Question 1' for Section/Question, 'Numeric' for Scoring Mode, 'Slider' for Scoring Type, and '1' for Weight, with a percentage of '100%'. Red boxes and numbers highlight the following elements: 1. The 'Financial Scoring Setup' tab in the navigation bar. 2. The 'Scoring Mode' dropdown menu. 3. The 'Scoring Type' dropdown menu. 4. The 'Weight' input field.

➤ Once the required criteria is complete, click the “Save” button at the top of the screen


SECTION 10: Prepare Solicitation – Pricing

1. Within the **Prepare Solicitation** step, select the **Pricing** tab from the top of the screen.
2. Complete the **Pricing Matrix** (*highlighted in red below*); note all fields marked with a red asterisk must be completed in order to proceed.


NOTE: Fields marked with (V) are visible to the vendor; these settings can be managed by right clicking on the column headers



Selected Round *


Lot 1 - Round 1 : QRG RFP Double Envelope (Draft) 


Setup Attachments Invited Vendors Technical Questions Technical Scoring Setup Financial Questions Financial Scoring Setup **Pricing (F)** View Now

Keywords Price Grid Items' groups Item Type  Search Reset

+ Add grid + Add products Export Grids to Excel Import Excel grids Preview

Pricing

Item Code (V)  Item Parent Items' groups Item Type (V)* Item Label (V)* Description (V) Specification Doc (V) Commodity Qty (V) Reference Price Target Price Deliv. date (V) Unit (V)

i1_1			Required Item	Consulting Services	Description	Specification Doc  Click or Drag to add a file	53000000 - Apparel and Luggage and Perennial	Qty	Referen...	Target P...	Deliv. da	
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0 Results

TIPS:

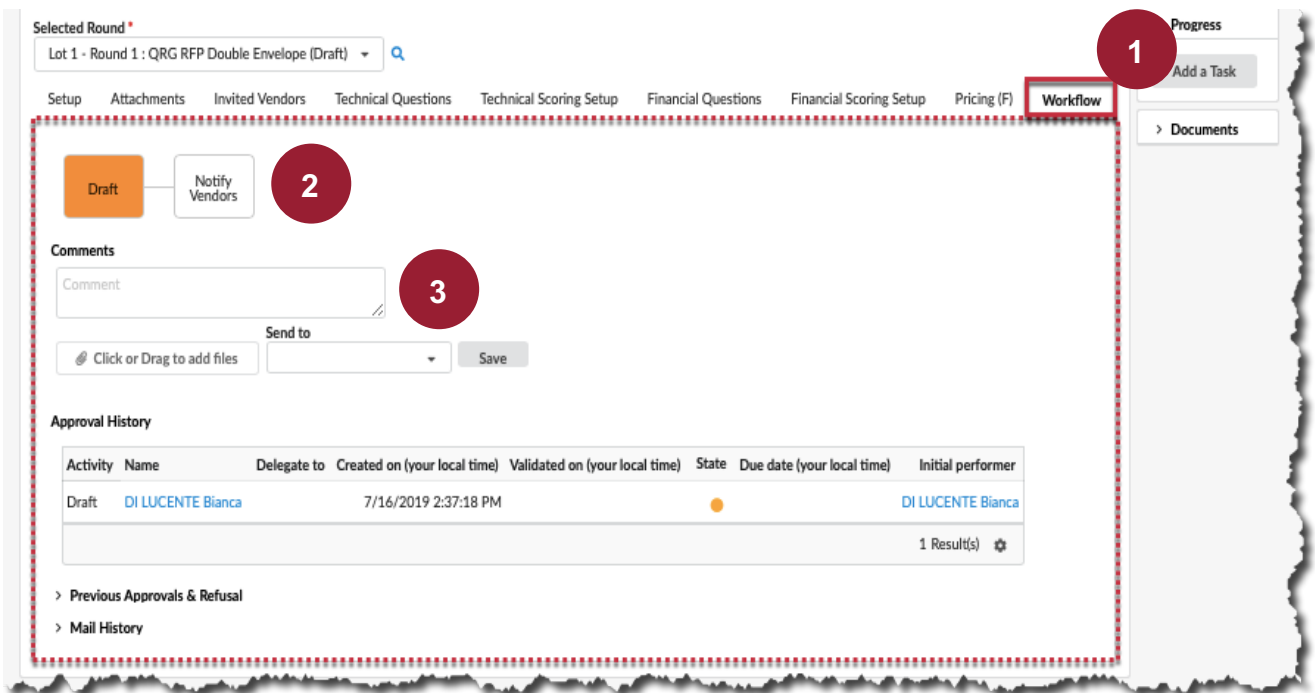
- **Item Code:** This is a system generated field and does not require editing by the Project Owner
- **Item Label:** Ensure to write a clear and concise Item Label; this is what the vendor will use as an indicator when preparing pricing submissions

- Once the required criteria is complete, click the “Save” button at the top of the screen


SECTION 10: Prepare Solicitation – Workflow

1. Within the **Prepare Solicitation** step, select the **Workflow** tab from the top of the screen.
2. Review the **Workflow status**.
3. Enter any final **Comments** or **Documents** specific to the Workflow.

NOTE: This portion is optional; there are no required fields to complete



Selected Round *

Lot 1 - Round 1 : QRG RFP Double Envelope (Draft) 


Setup Attachments Invited Vendors Technical Questions Technical Scoring Setup Financial Questions Financial Scoring Setup Pricing (F) **Workflow**

Draft **Notify Vendors**


Comments


Comment

Send to

 Click or Drag to add files **Save**

Approval History

Activity	Name	Delegate to	Created on (your local time)	Validated on (your local time)	State	Due date (your local time)	Initial performer
Draft	DI LUCENTE Bianca		7/16/2019 2:37:18 PM				DI LUCENTE Bianca

1 Result(s) 

> Previous Approvals & Refusal

> Mail History

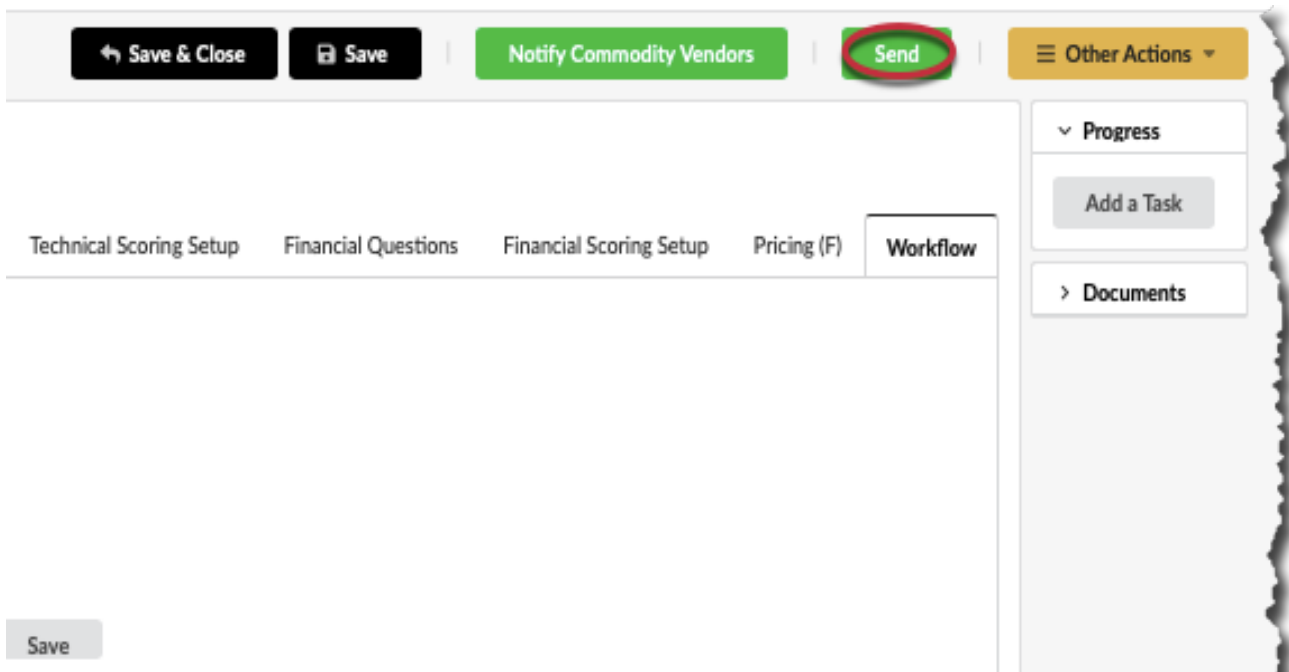
- Once the required criteria is complete, click the “Save” button at the top of the screen

SECTION 11: Send the Solicitation

1. Within the **Prepare Solicitation** step, select the green “**Send**” button at the top of the screen.

IMPORTANT: Click “Send” once only.

NOTE: *The solicitation will be made public on the date / time as scheduled within the Project Info step*

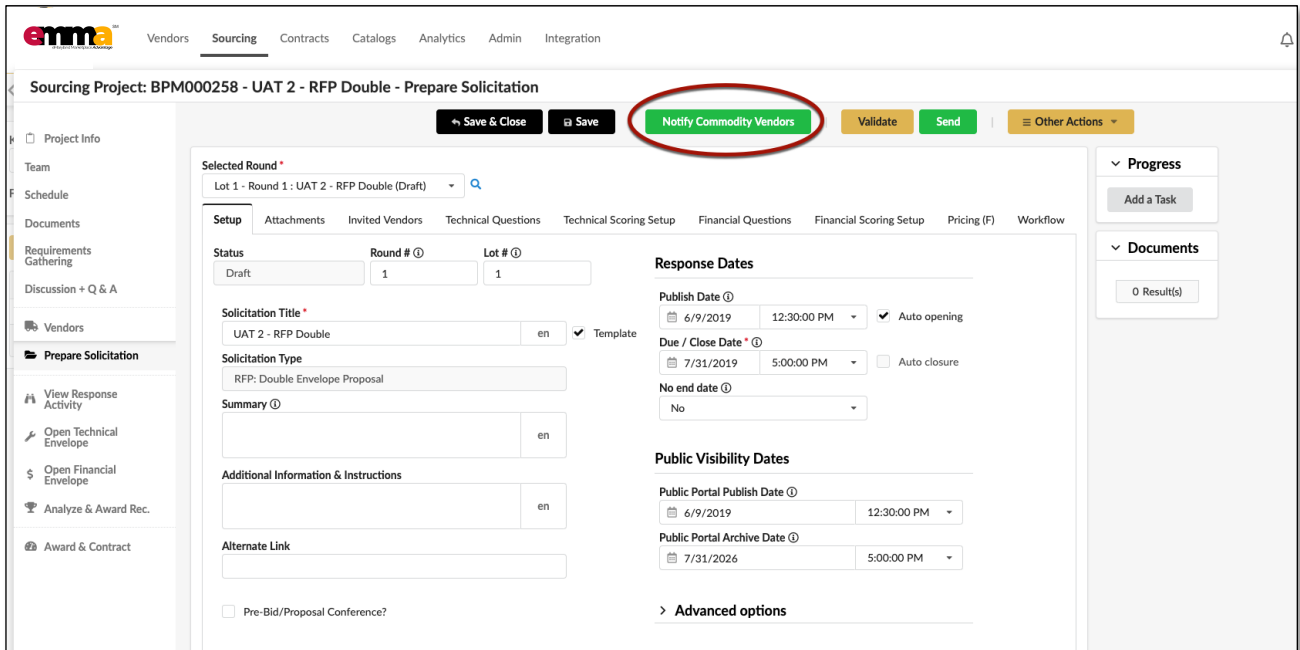


The screenshot shows the 'Prepare Solicitation' step in the eMMA system. At the top, there is a navigation bar with several buttons: 'Save & Close' (black), 'Save' (black), 'Notify Commodity Vendors' (green), 'Send' (green, circled in red), and 'Other Actions' (yellow). Below this bar, there is a tabbed interface with five tabs: 'Technical Scoring Setup', 'Financial Questions', 'Financial Scoring Setup', 'Pricing (F)', and 'Workflow' (which is currently selected). The main content area is mostly blank, with a 'Save' button visible in the bottom left corner. On the right side, there is a sidebar with a 'Progress' section containing an 'Add a Task' button, and a 'Documents' section with a right-pointing arrow.

SECTION 12: Notify Commodity Vendors

1. Click “Notify Commodity Vendors”.

- NOTE: Clicking “Notify Commodity Vendors” will send a notice to all vendors with this solicitation’s specific Commodity codes listed in their profiles. Clicking “Send” will only send to the vendors you have selected under the Vendor tab.

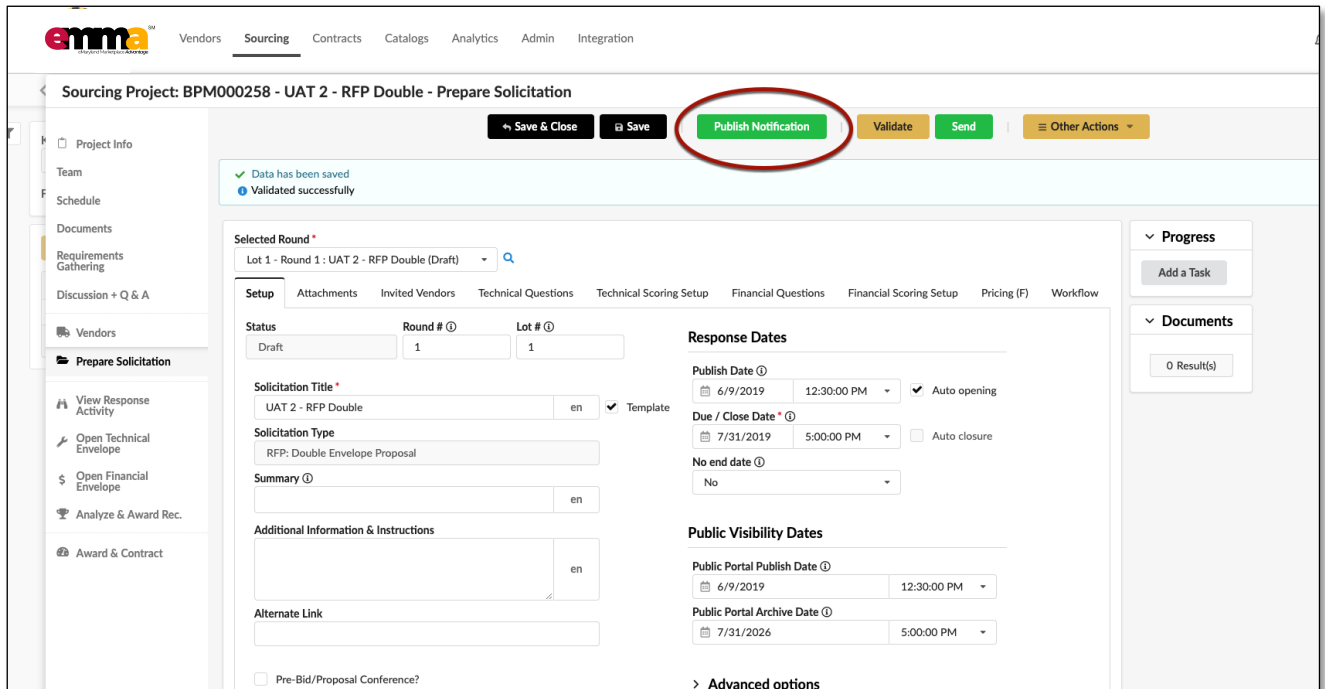


The screenshot shows the eMMA Sourcing Project interface for 'BPM000258 - UAT 2 - RFP Double - Prepare Solicitation'. The 'Notify Commodity Vendors' button is highlighted with a red circle. The interface includes a sidebar with navigation options like Project Info, Team, Schedule, Documents, Requirements Gathering, Discussion + Q & A, Vendors, Prepare Solicitation, View Response Activity, Open Technical Envelope, Open Financial Envelope, Analyze & Award Rec., and Award & Contract. The main content area shows the 'Setup' tab with fields for Solicitation Title, Solicitation Type, Summary, Additional Information & Instructions, and Alternate Link. It also includes sections for Response Dates (Publish Date, Due / Close Date, No end date) and Public Visibility Dates (Public Portal Publish Date, Public Portal Archive Date). A 'Pre-Bid/Proposal Conference?' checkbox is at the bottom left.

SECTION 13: Publish Notification

1. Click “Publish Notification”.

This is the final step, and your Solicitation will now be published and sent to selected vendors, as well as vendors matching the commodity codes chose for this Solicitation.



The screenshot shows the eMMA Sourcing Project interface for 'BPM000258 - UAT 2 - RFP Double - Prepare Solicitation'. The 'Publish Notification' button is circled in red. The interface includes a sidebar with navigation options like Project Info, Team, Schedule, Documents, Requirements Gathering, Discussion + Q & A, Vendors, and Prepare Solicitation. The main area displays the 'Selected Round' as 'Lot 1 - Round 1 : UAT 2 - RFP Double (Draft)'. The 'Status' is 'Draft', 'Round # 1', and 'Lot # 1'. The 'Solicitation Title' is 'UAT 2 - RFP Double', 'Solicitation Type' is 'RFP: Double Envelope Proposal', and 'Summary' is 'en'. The 'Additional Information & Instructions' field is empty. The 'Alternate Link' field is empty. The 'Response Dates' section shows 'Publish Date' as 6/9/2019 at 12:30:00 PM, 'Due / Close Date' as 7/31/2019 at 5:00:00 PM, and 'No end date' as 'No'. The 'Public Visibility Dates' section shows 'Public Portal Publish Date' as 6/9/2019 at 12:30:00 PM and 'Public Portal Archive Date' as 7/31/2026 at 5:00:00 PM. The 'Advanced options' section is expanded.