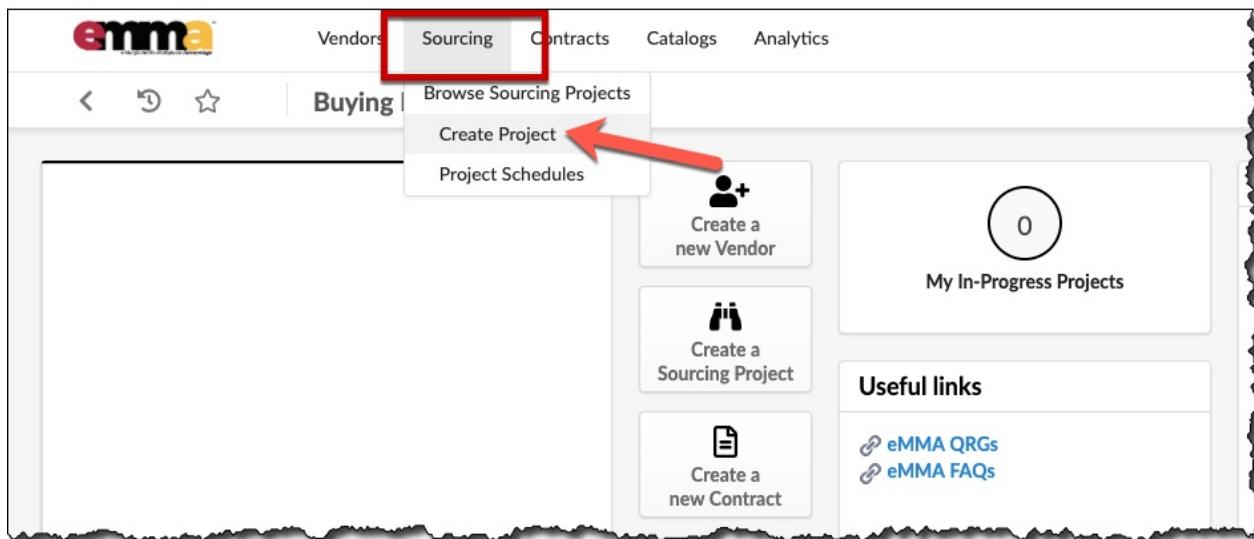


OVERVIEW

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 <small>(i)</small>	eMM Solicitation #	<input type="checkbox"/> Is a template
Project Type <small>*</small>	Project Start Date <small>*</small>	Status
RFP: Double Envelope Proposal (LP)	7/15/20	In progress
Project Title <small>*</small>	Project End Date	<input type="checkbox"/> Confidential Sourcing Project
QRG RFP Double Envelope		
Main Category <small>*</small>	Other Commodities	
B6000000 - Education and Training Services		
Issuing Agency <small>*</small>	Other Organizations	
Motor Vehicle Administration (J04)		
Procurement Officer / Buyer <small>*</small>		
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:

- Federal Funding:** Indicate the status of the **Federal Funding**
- SBR Description:** Enter the **Small Business Reserve** description
- MBE Goal:** Indicate the **Minority Business Enterprise** Goal Status
- 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

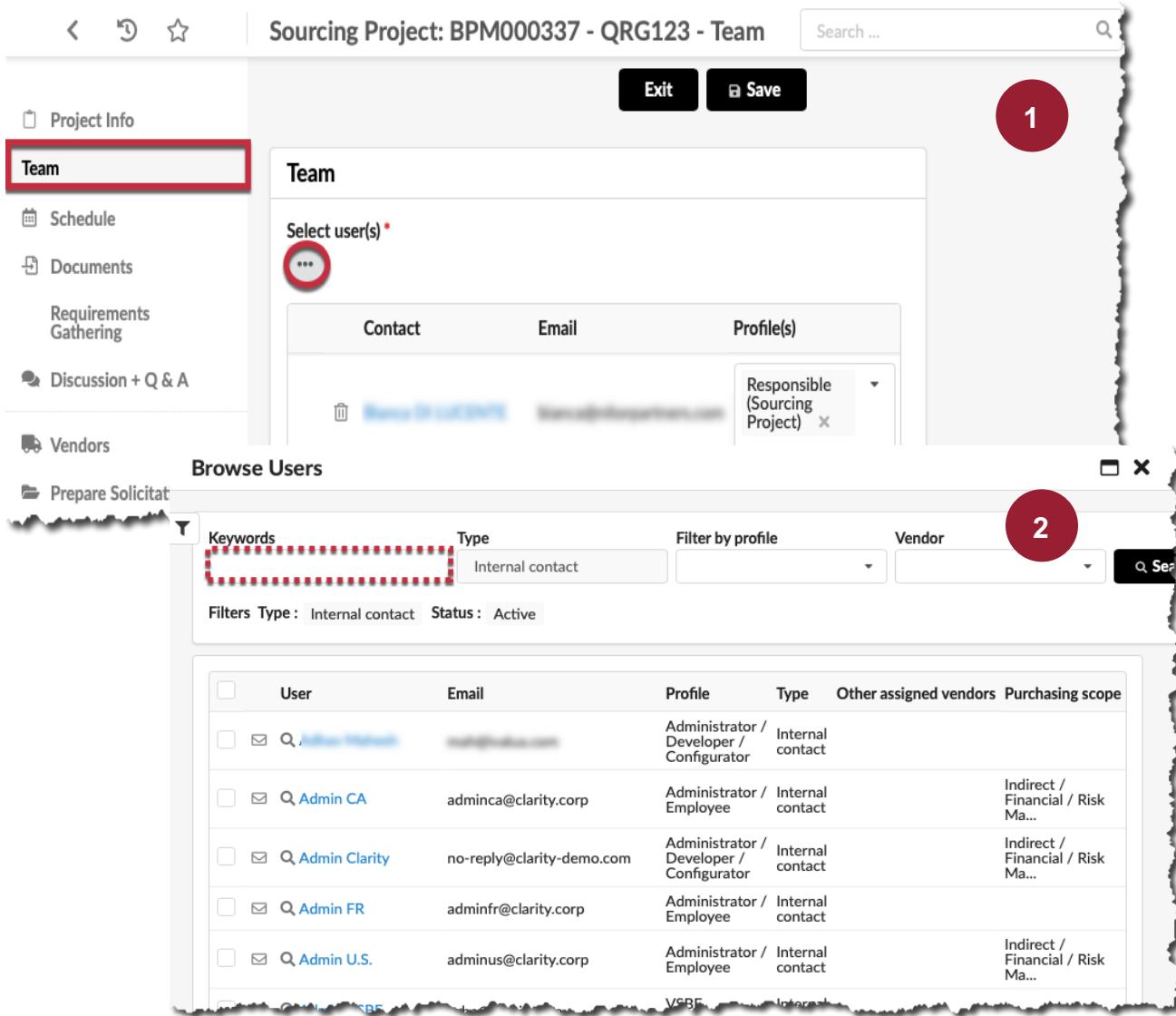
Additional Information

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



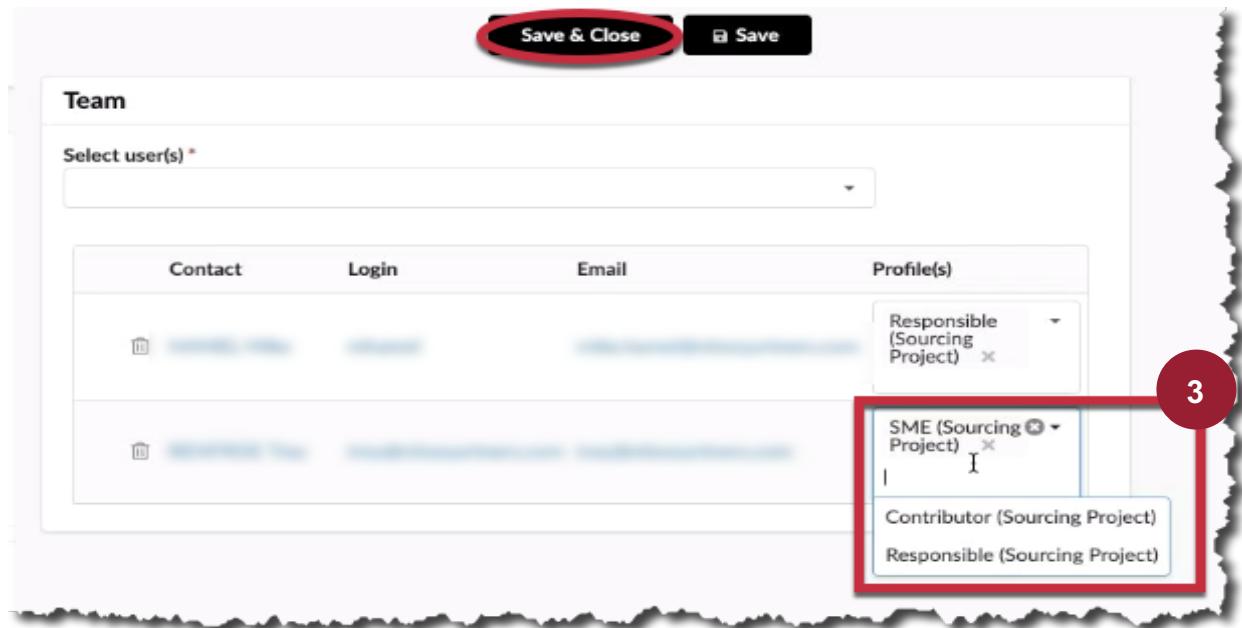
The screenshot shows the eMMA software interface for creating a team. The left sidebar has tabs for Project Info, Team (highlighted with a red box), Schedule, Documents, Requirements Gathering, Discussion + Q & A, Vendors, and Prepare Solicitation. The main area shows a 'Team' creation screen with a 'Select user(s)*' field and a 'Browse Users' modal. The 'Keywords' field in the modal is highlighted with a red dashed box. The 'Browse Users' modal has a 'Filters' section with 'Type: Internal contact' and 'Status: Active'. The user list table has columns: User, Email, Profile, Type, Other assigned vendors, and Purchasing scope. The table shows several users, including Admin CA, Admin Clarity, Admin FR, and Admin U.S., each with their email, profile (e.g., Administrator / Developer / Configurator), type (Internal contact), and purchasing scope (e.g., Indirect / Financial / Risk Ma...).

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

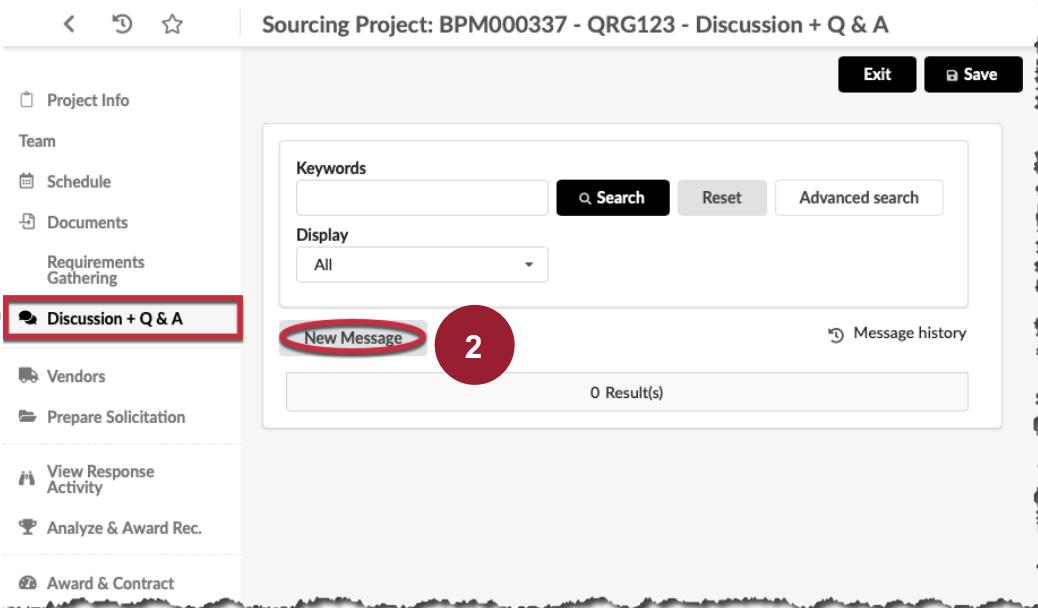
Contact	Login	Email	Profile(s)
			Responsible (Sourcing Project) <input checked="" type="checkbox"/>
			SME (Sourcing Project) <input type="checkbox"/>
			Contributor (Sourcing Project) <input type="checkbox"/>
			Responsible (Sourcing Project) <input type="checkbox"/>

➤ 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.

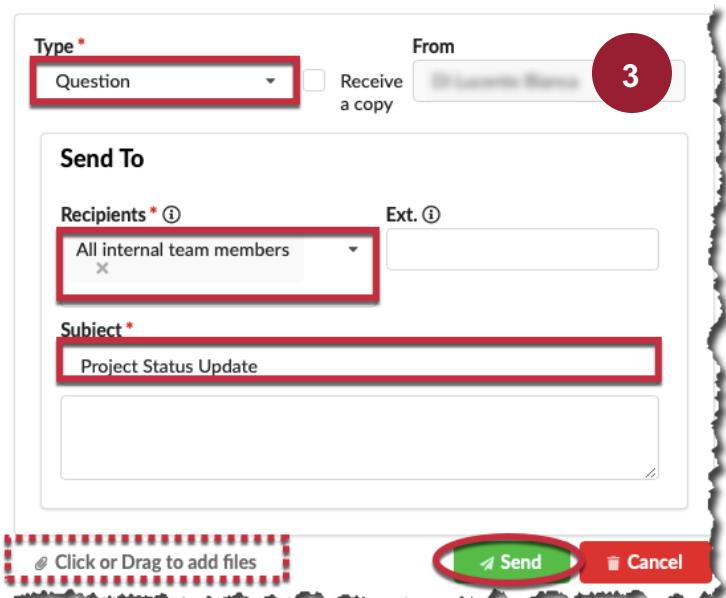


The screenshot shows the eMMA Sourcing Project interface. On the left, a sidebar lists various project steps: Project Info, Team, Schedule, Documents, Requirements Gathering, **Discussion + Q & A** (highlighted with a red box and circled with a red number 1), Vendors, Prepare Solicitation, View Response Activity, Analyze & Award Rec., and Award & Contract. The main area is titled "Sourcing Project: BPM000337 - QRG123 - Discussion + Q & A". It contains a search bar with "Keywords" and "Display" filters, a "New Message" button (circled with a red number 2), and a "Message history" section showing "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*



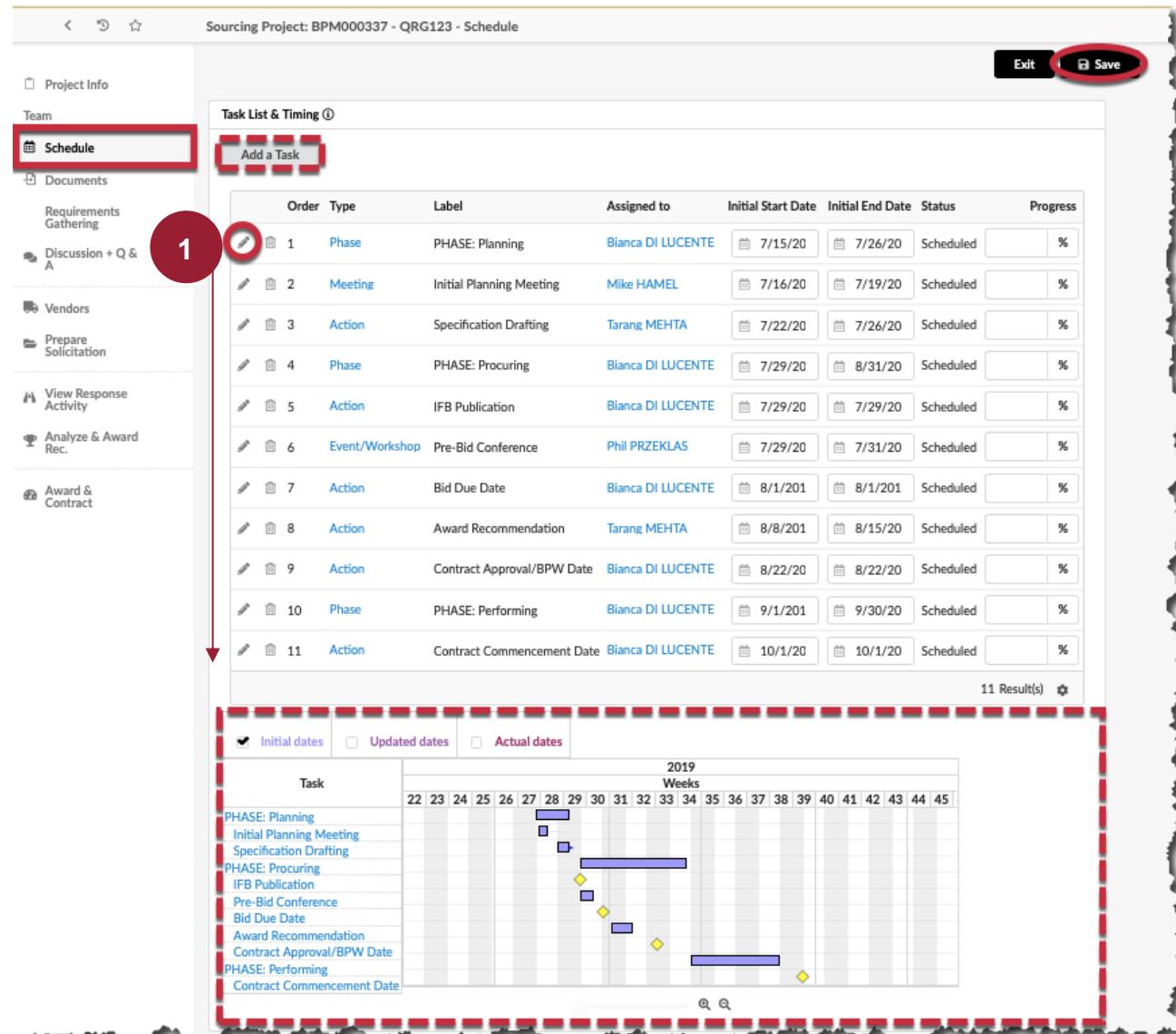
The screenshot shows the "New Message" dialog box. It includes fields for "Type" (set to "Question" with a red box and circled with a red number 3), "From" (with a "Receive a copy" checkbox), "Send To" (with a dropdown menu showing "All internal team members" and a "Recipients" field with a red asterisk), "Subject" (set to "Project Status Update"), and a "Send" button (highlighted with a green oval). At the bottom left, there is a red dashed box with the text "Click or Drag to add files".

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

Project Info

Team

Schedule (highlighted)

Documents

Requirements Gathering

Discussion + Q & A

Vendors

Prepare Solicitation

View Response Activity

Analyze & Award Rec.

Award & Contract

Task List & Timing ①

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 * <input type="text" value="PHASE: Planning"/>	Type * <input type="text" value="Phase"/>	Task Code * ⓘ <input type="text" value="TO"/>
Description <input style="height: 100px;" type="text"/>		
		Status <input type="text" value="Scheduled"/>
Manager * <input type="text" value="DI LUCENTE Bianca"/>		
Estimated Workload ⓘ		
Parent Task <input type="text"/>		
Previous Task <input type="text"/>		
Assigned to <div style="border: 1px solid #ccc; padding: 5px; display: inline-block; width: fit-content;"> <input type="text" value="PRZEKLAS Phil"/> ⓘ HAMEL Mike PRZEKLAS Phil MEHTA Tarang DI LUCENTE Bianca </div>		
Progress <input style="width: 50px;" type="text"/> %		

1

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

Initial	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"/>	11
Revisited	Revisited Start Date	Updated End Date	Revisited Duration
Updated	<input type="text"/>	<input type="text"/>	
Actual	Actual Start Date	Actual End Date	Duration
	<input type="text"/>	<input type="text"/>	

2

Comments

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.

3

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.)

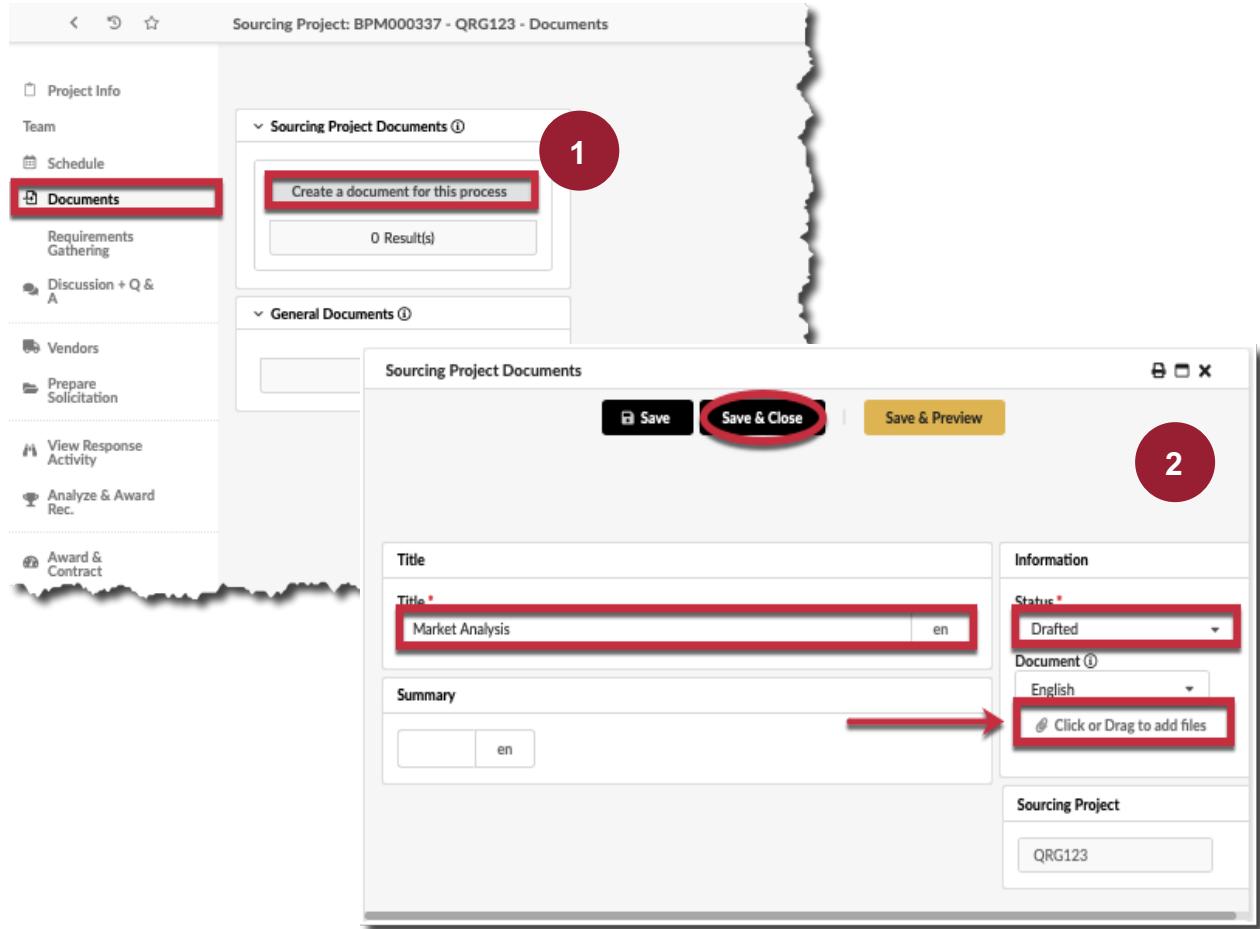
- Click the “Save & Close” button at the top of the screen to incorporate all edits and return to the **Schedule** home screen



SECTION 7: Add Documents

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

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



The screenshot shows the eMMA interface with the following details:

- Left Sidebar:** Shows navigation steps: Project Info, Team, Schedule, **Documents** (highlighted with a red box), Requirements Gathering, Discussion + Q & A, Vendors, Prepare Solicitation, View Response Activity, Analyze & Award Rec., and Award & Contract.
- Top Header:** Sourcing Project: BPM000337 - QRG123 - Documents
- Main Content:**
 - Sourcing Project Documents:** A button labeled "Create a document for this process" is highlighted with a red box and circled with a red number 1.
 - General Documents:** Shows 0 Result(s).
- Pop-up Window:**
 - Buttons:** Save, **Save & Close** (highlighted with a red box and circled with a red number 2), and Save & Preview.
 - Form Fields:**
 - Title:** Market Analysis (highlighted with a red box)
 - Summary:** (Summary text area)
 - Information:**
 - Status:** Drafted
 - Document:** English (highlighted with a red box)
 - File Upload:** Click or Drag to add files (highlighted with a red box and indicated by a red arrow)
 - 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

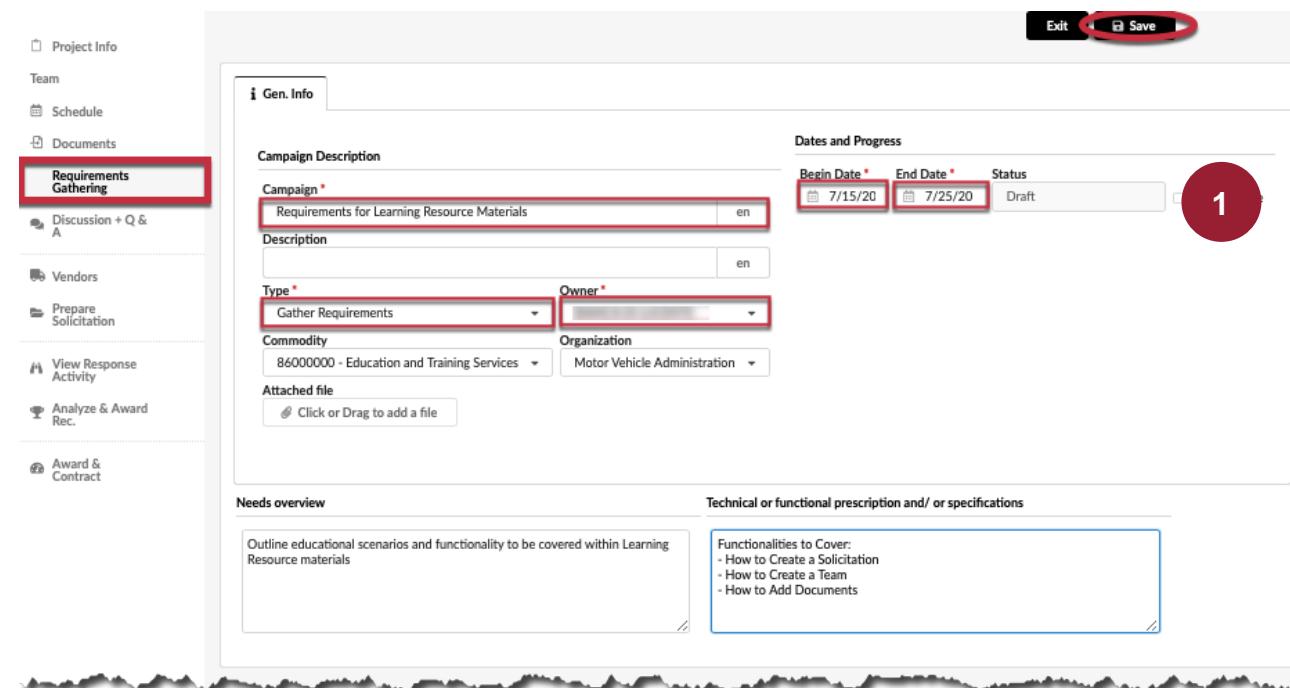
NOTE: The Documents added to this section are only visible by the internal team to the Sourcing Project. This is an appropriate place to store such items as market analysis, research etc. These documents can be copied to the solicitation and shared with vendors if desired.

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*

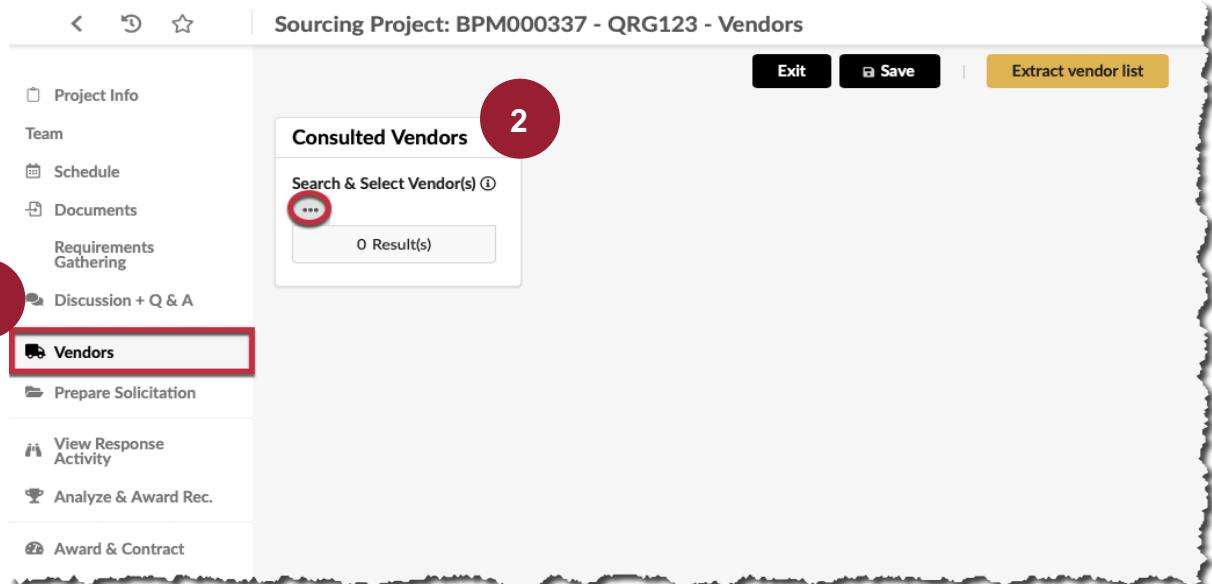


- Once the required criteria is complete, click the “Save” button at the top of the screen

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.



Sourcing Project: BPM000337 - QRG123 - Vendors

Project Info
Team
Schedule
Documents
Requirements Gathering
Discussion + Q & A
Vendors (red box)
Prepare Solicitation
View Response Activity
Analyze & Award Rec.
Award & Contract

Consulted Vendors

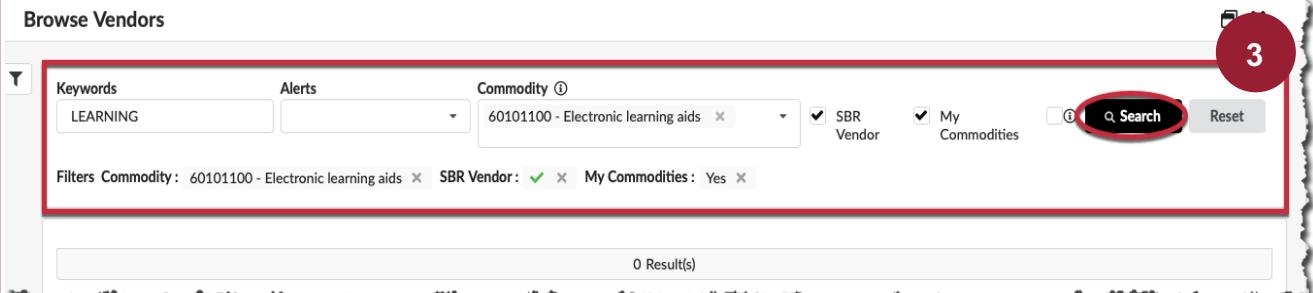
Search & Select Vendor(s) (red box)
...

0 Result(s)

Exit Save Extract vendor list

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.



Keywords: LEARNING
Alerts
Commodity: 60101100 - Electronic learning aids
SBR Vendor: Yes
My Commodities
Search
Reset

Filters Commodity: 60101100 - Electronic learning aids
SBR Vendor: Yes
My Commodities: Yes

0 Result(s)

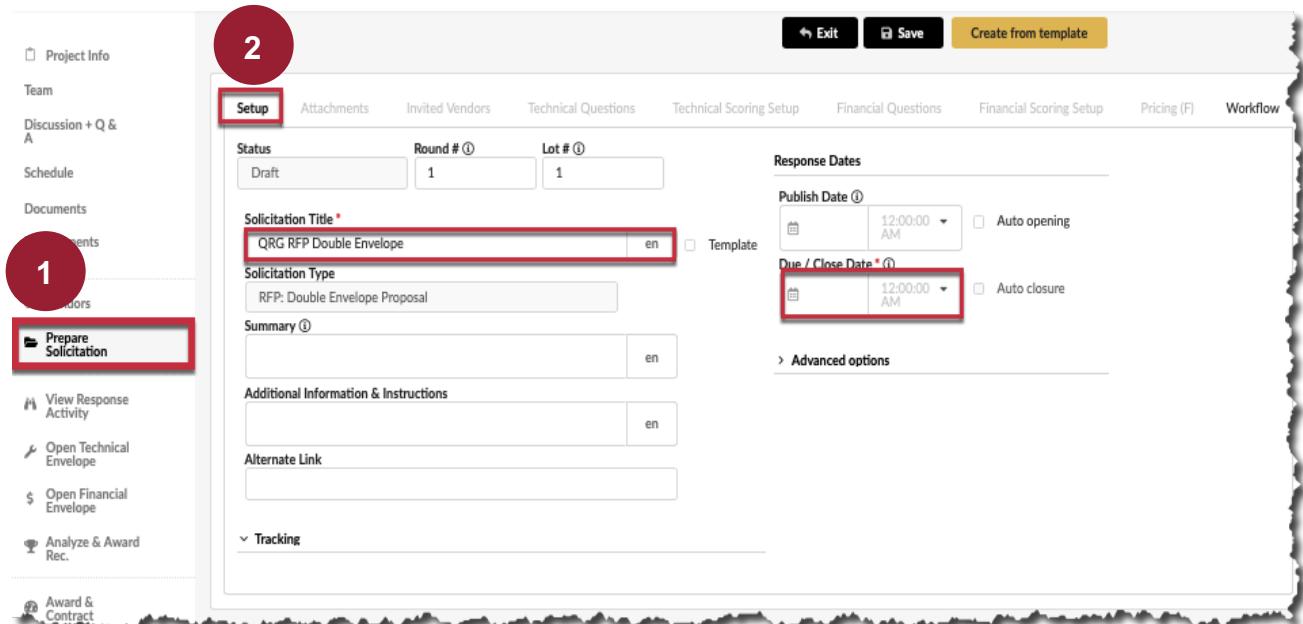
IMPORTANT: For solicitations that require a longer period of time, the list of vendors receiving notifications may need to be updated/refreshed to capture newly registered vendors for a specific category code.

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.*



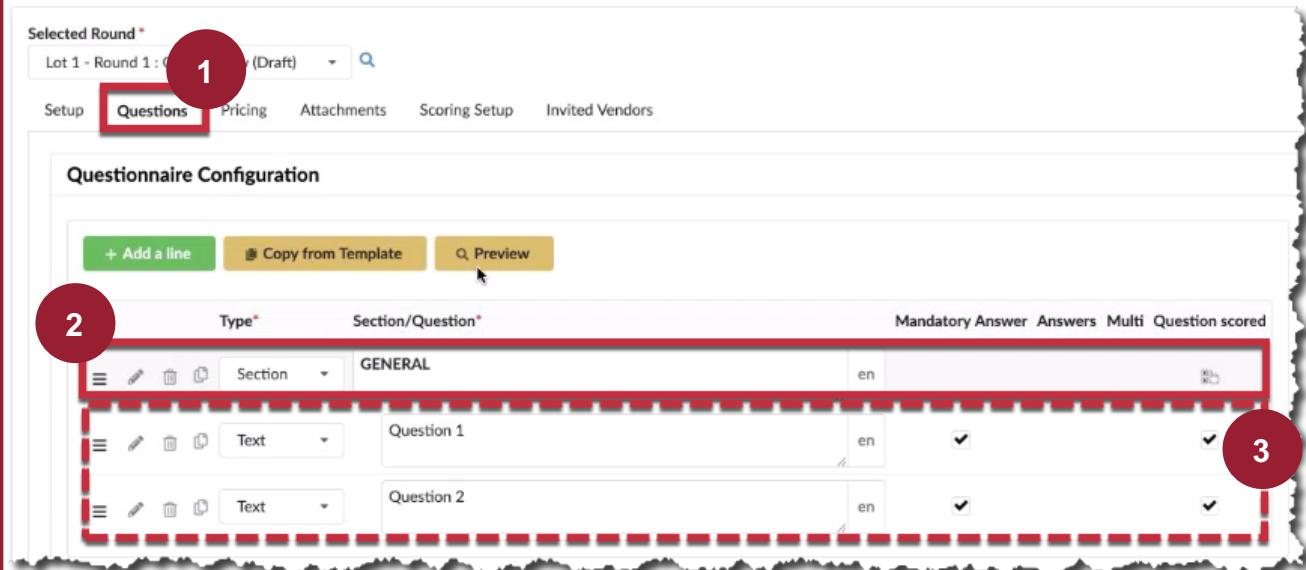
The screenshot shows the 'Prepare Solicitation' screen in eMMA. The left sidebar has a red box around 'Prepare Solicitation'. A red circle with '1' is over 'Team'. A red circle with '2' is over the 'Setup' tab, which is selected. The main area shows a 'Solicitation Title' field with 'QRG RFP Double Envelope' and a 'Due / Close Date' field set to 12:00:00 AM. The 'Save' button is at the top right.

- 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



Selected Round *
Lot 1 - Round 1 : One Day (Draft)

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

Questionnaire Configuration

+ Add a line	Copy from Template	Preview			
Type*	Section/Question*	Mandatory Answer	Answers	Multi	Question scored
Section	GENERAL	en			
Text	Question 1	en	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Text	Question 2	en	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

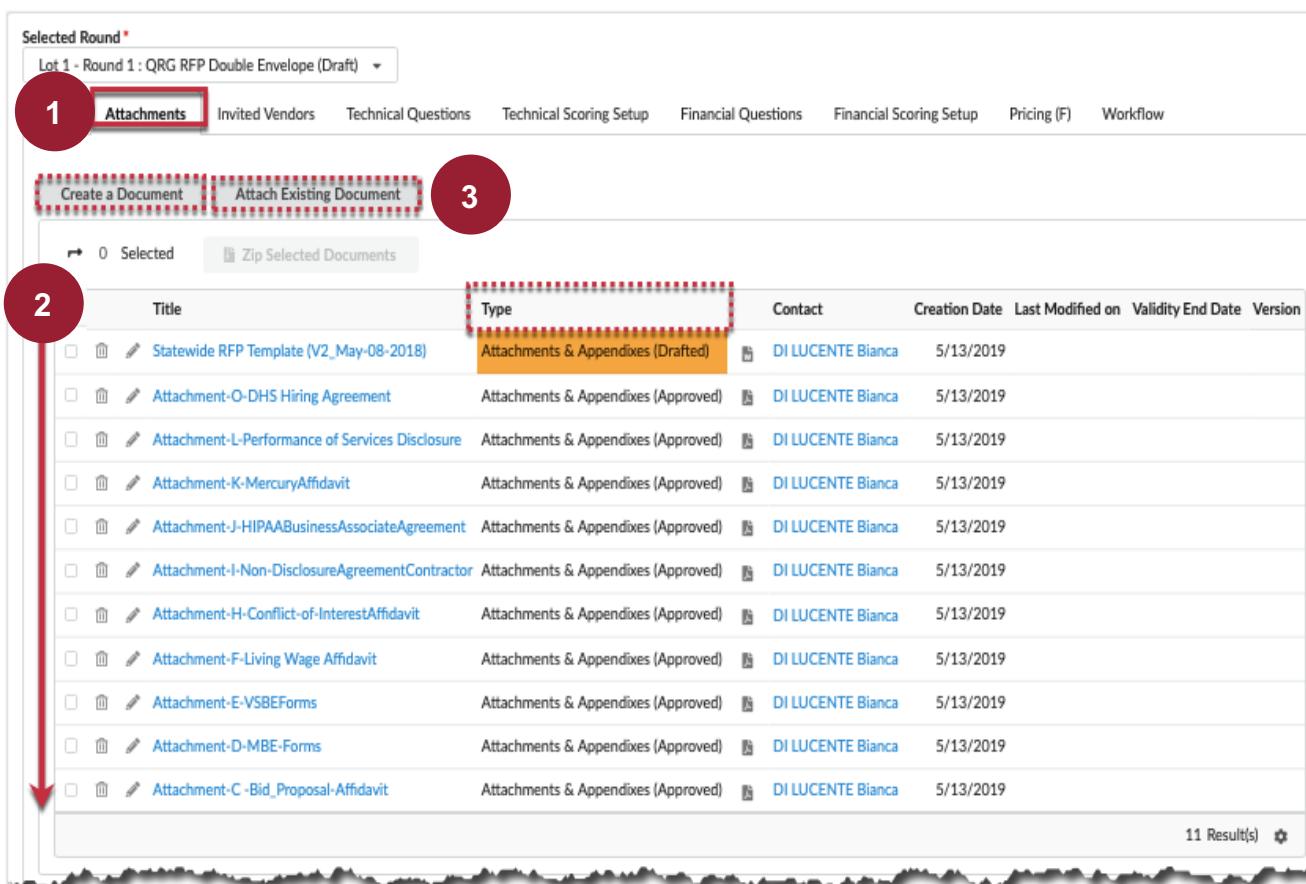
NOTE: All questions are required to be housed within a section

- 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. A red circle labeled '1' highlights the 'Attachments' tab. A red circle labeled '2' points to the 'Type' column in the table, which is currently set to 'Attachments & Appendixes (Drafted)'. A red circle labeled '3' points to the 'Create a Document' and 'Attach Existing Document' buttons at the top of the list.

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-MercuryAffidavit	Attachments & Appendixes (Approved)	DI LUCENTE Bianca	5/13/2019			
Attachment-J-HIPAABusinessAssociateAgreement	Attachments & Appendixes (Approved)	DI LUCENTE Bianca	5/13/2019			
Attachment-I-Non-DisclosureAgreementContractor	Attachments & Appendixes (Approved)	DI LUCENTE Bianca	5/13/2019			
Attachment-H-Conflict-of-InterestAffidavit	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-VSBEForms	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			

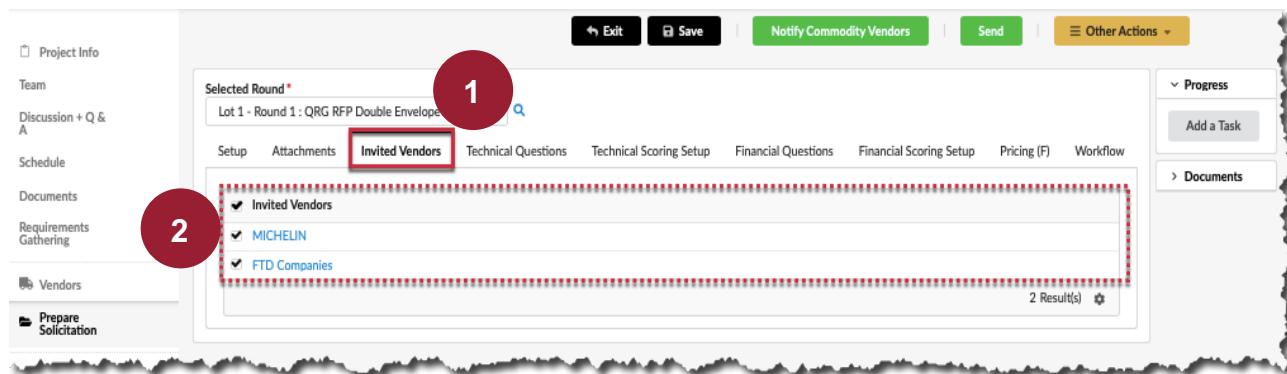
11 Result(s) 

➤ 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



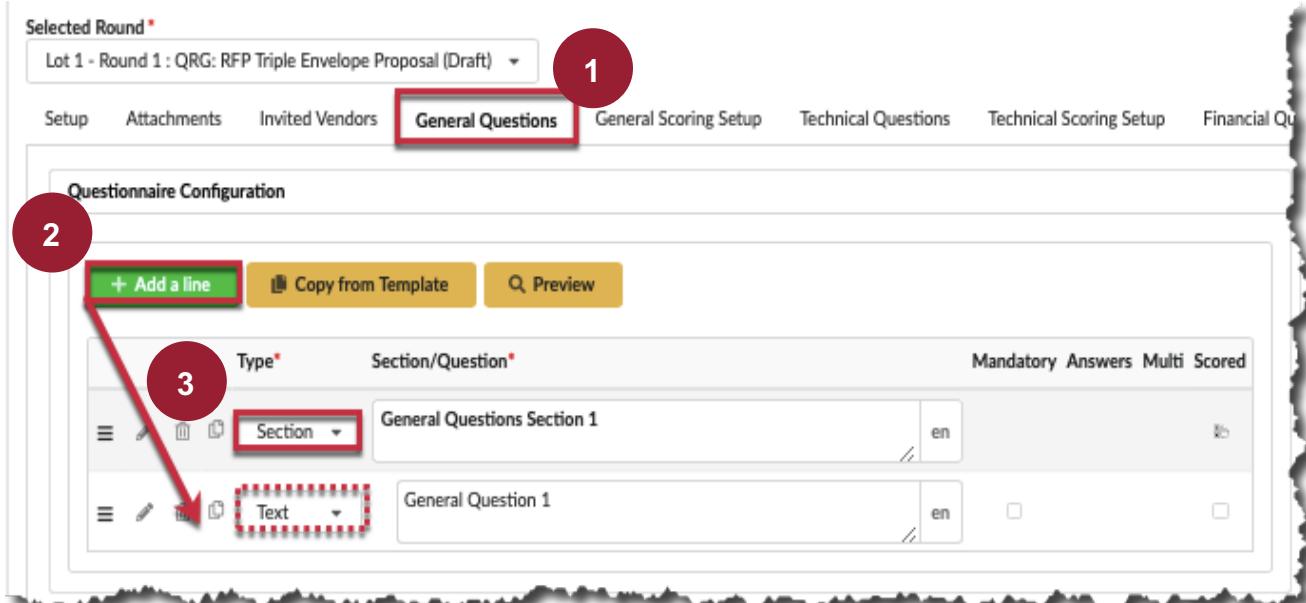
- Once the required criteria is complete, click the “Save” button at the top of the screen

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. Note 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 Qu

Questionnaire Configuration

+ Add a line Copy from Template Preview

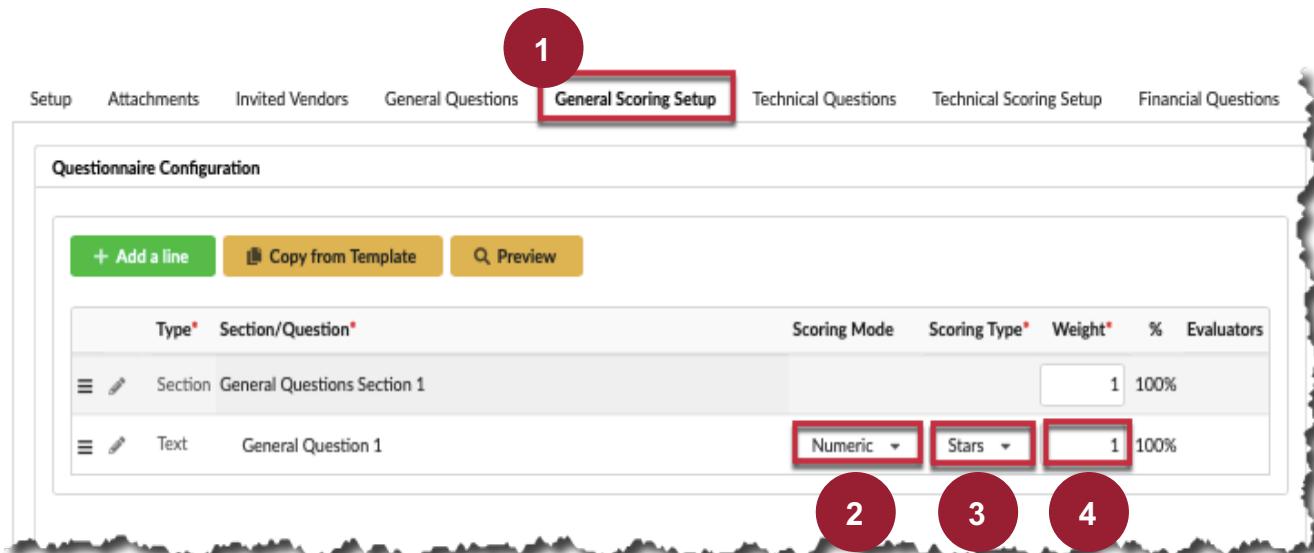
Type*	Section/Question*	Mandatory	Answers	Multi Scored
Section	General Questions Section 1	<input checked="" type="checkbox"/>	en	<input type="checkbox"/>
Text	General Question 1	<input checked="" type="checkbox"/>	en	<input type="checkbox"/>

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



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

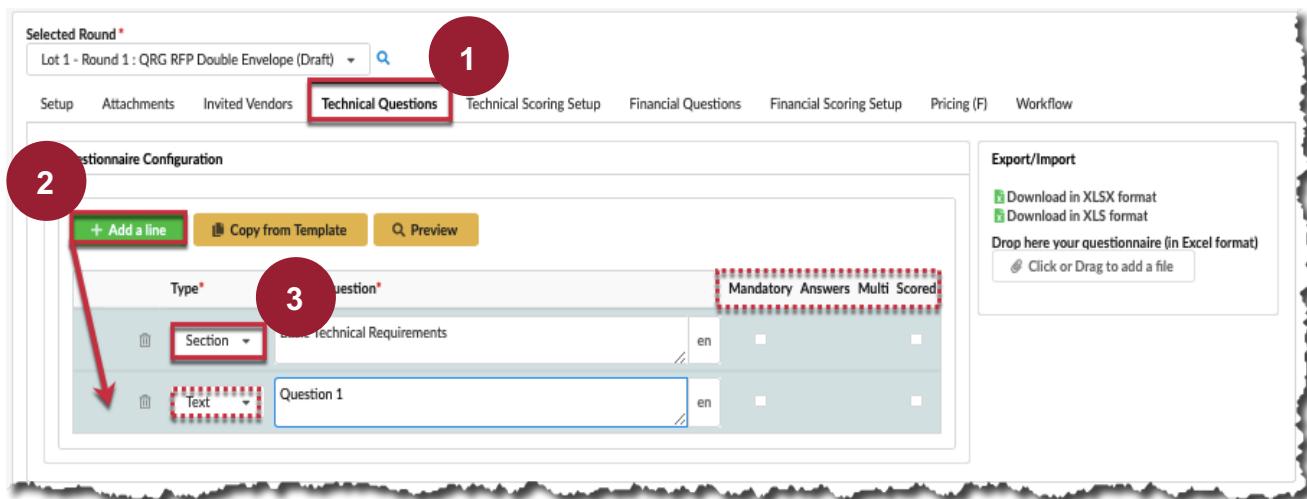
- Once the required criteria is complete, click the “Save” button at the top of the screen

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

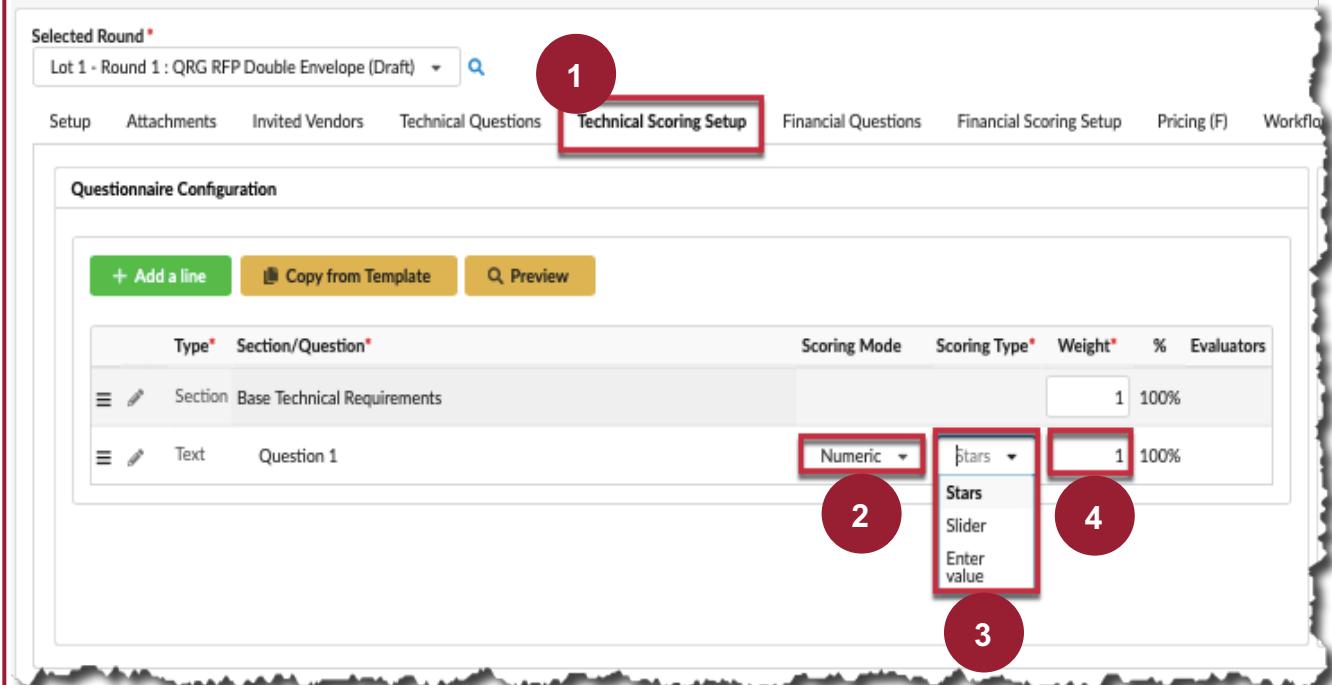


NOTE: The check boxes on the right side of the line items need to be managed in order to determine what Sections / Questions are mandatory and / or scorable

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

+ Add a line Copy from Template Preview

Type*	Section/Question*	Scoring Mode	Scoring Type*	Weight*	%	Evaluators
Section	Base Technical Requirements	Numeric	Stars	1	100%	
Text	Question 1	Slider	Enter value	1	100%	

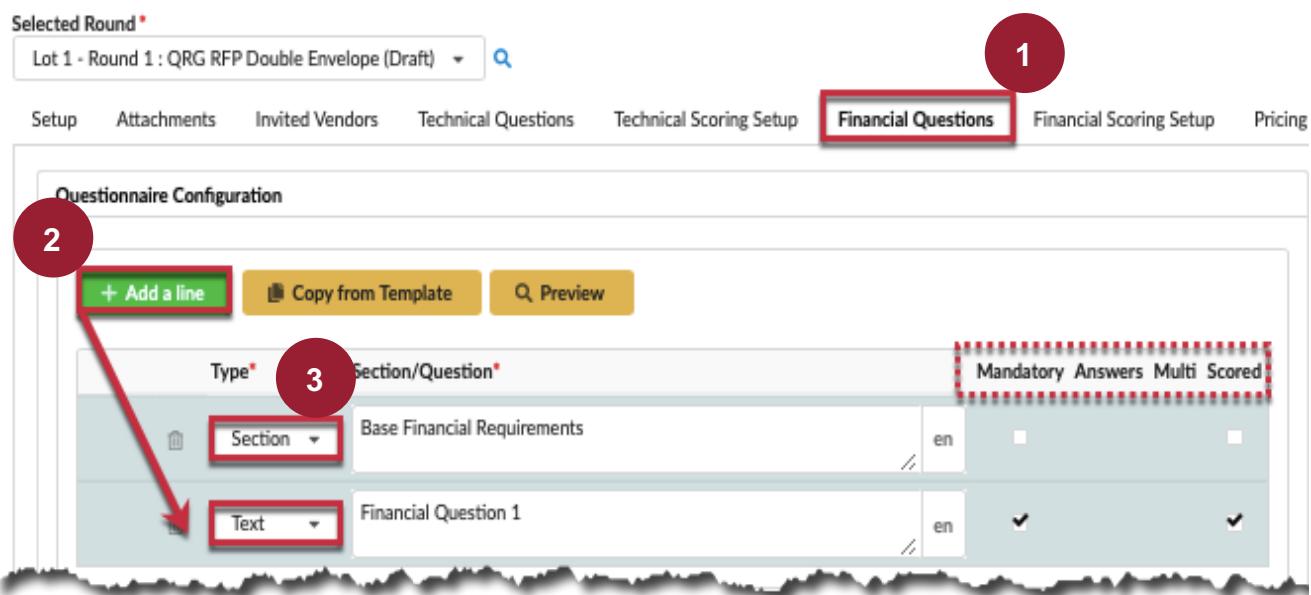
- Once the required criteria is complete, click the “Save” button at the top of the screen

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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Text	Financial Question 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

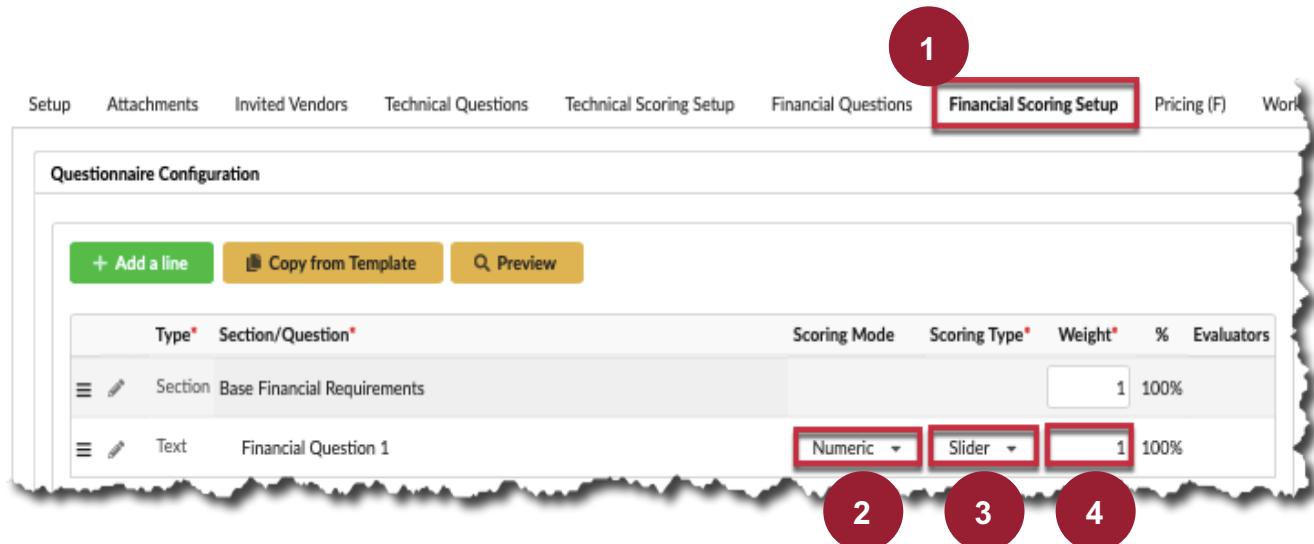
NOTE: The check boxes on the right side of the line items need to be managed in order to determine what Sections / Questions are mandatory and / or scorable

- 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



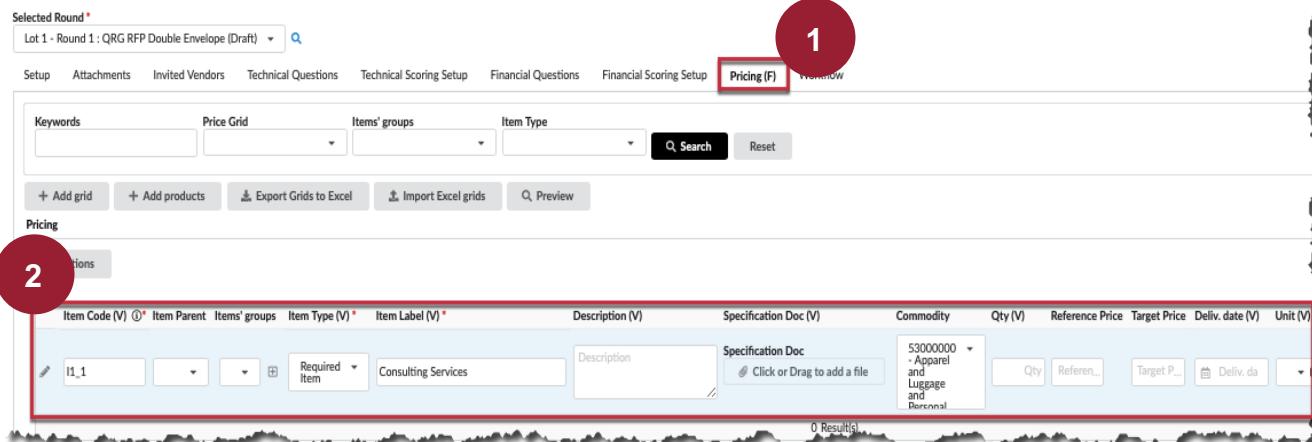
Type*	Section/Question*	Scoring Mode	Scoring Type*	Weight*	%	Evaluators
Section	Base Financial Requirements			1	100%	
Text	Financial Question 1	Numeric	Slider	1	100%	

- 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*



The screenshot shows the 'Pricing' tab selected in the top navigation bar. The main area displays a grid for entering procurement data. The first column, 'Item Code (V)', is highlighted with a red border and a red circle with the number '2' above it. The grid also includes columns for '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)', and 'Unit (V)'. A 'Specification Doc' field contains the placeholder 'Click or Drag to add a file'. A 'Commodity' dropdown menu is open, showing '53000000' and 'Apparel and Luggage and Personal'.

TIPS:

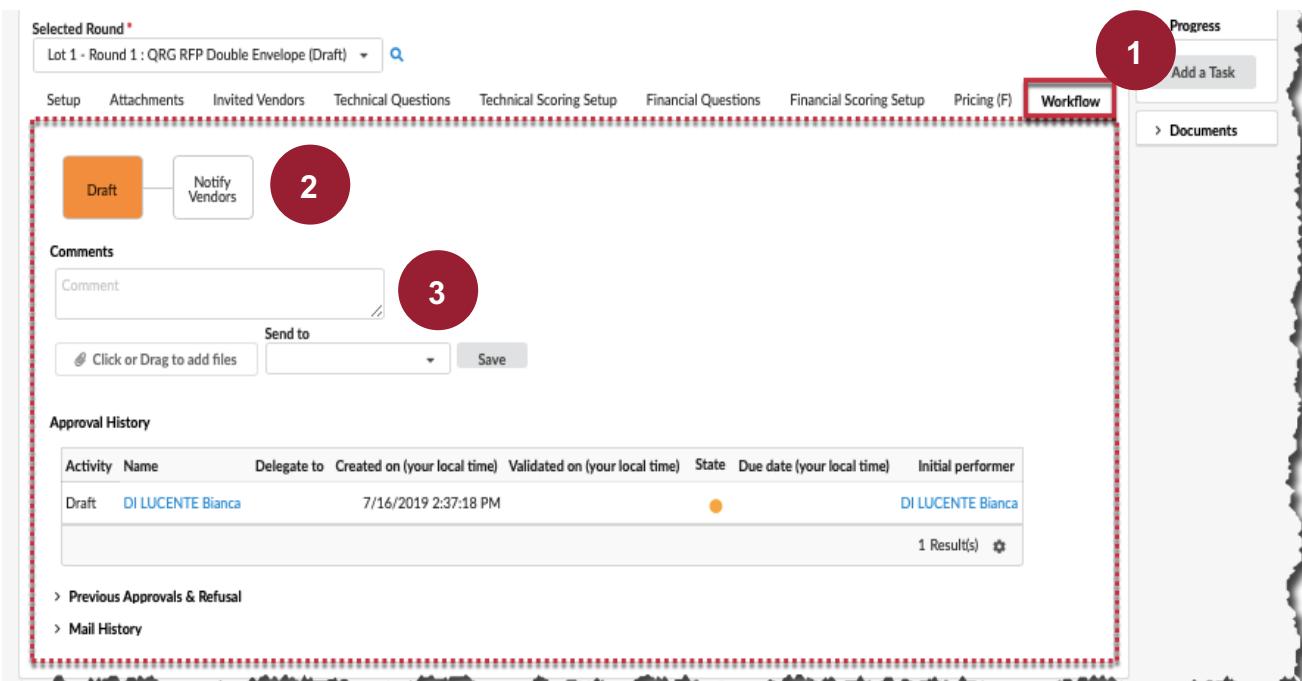
- **Item Code:** *This is a system generated field and does not require editing by the Project Owner*
- **Item Label:** *Ensure to write a clear and concise Item Label; this is what the vendor will use as an indicator when preparing pricing submissions*

- 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 **2**

Comments
Comment
Send to
Click or Drag to add files Save **3**

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

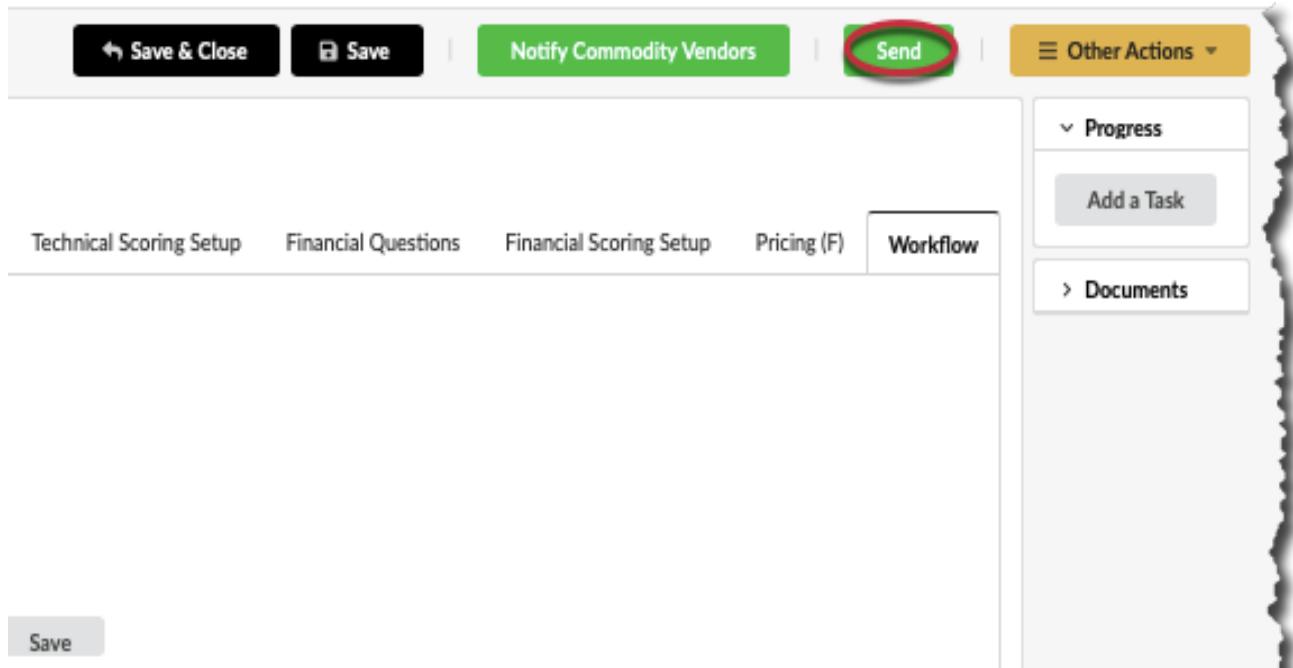
- Once the required criteria is complete, click the “Save” button at the top of the screen

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.

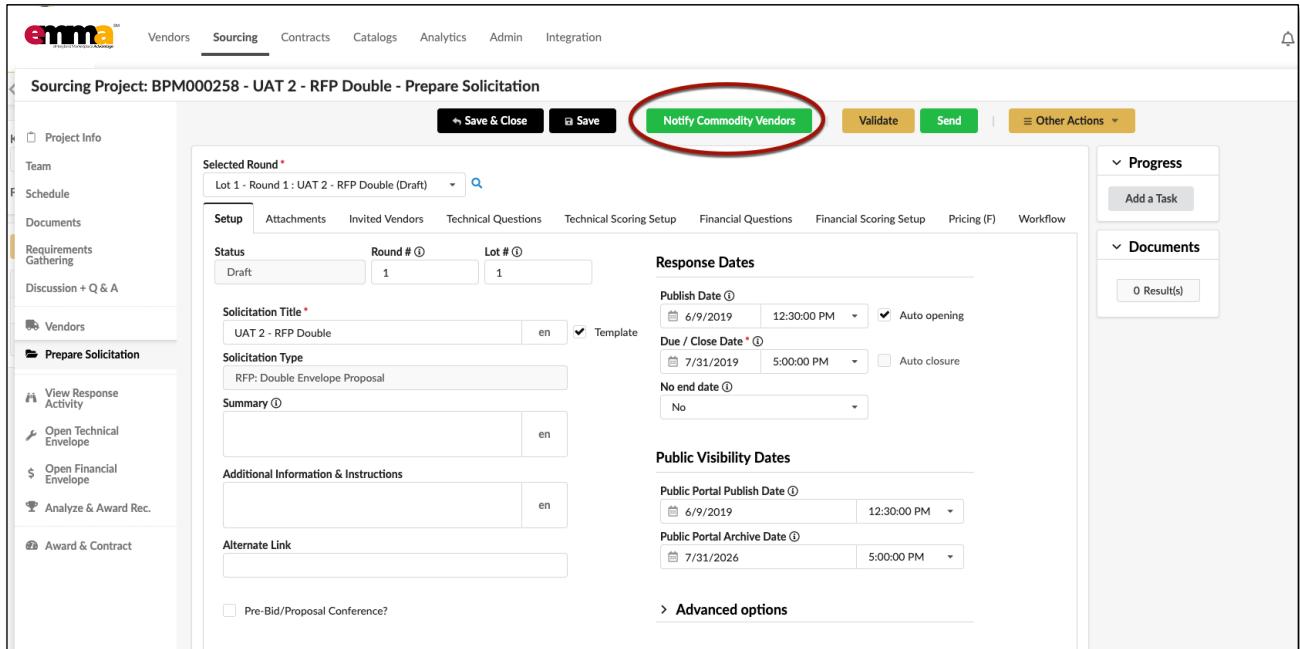
NOTE: *The solicitation will be made public on the date / time as scheduled within the Project Info step*



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.

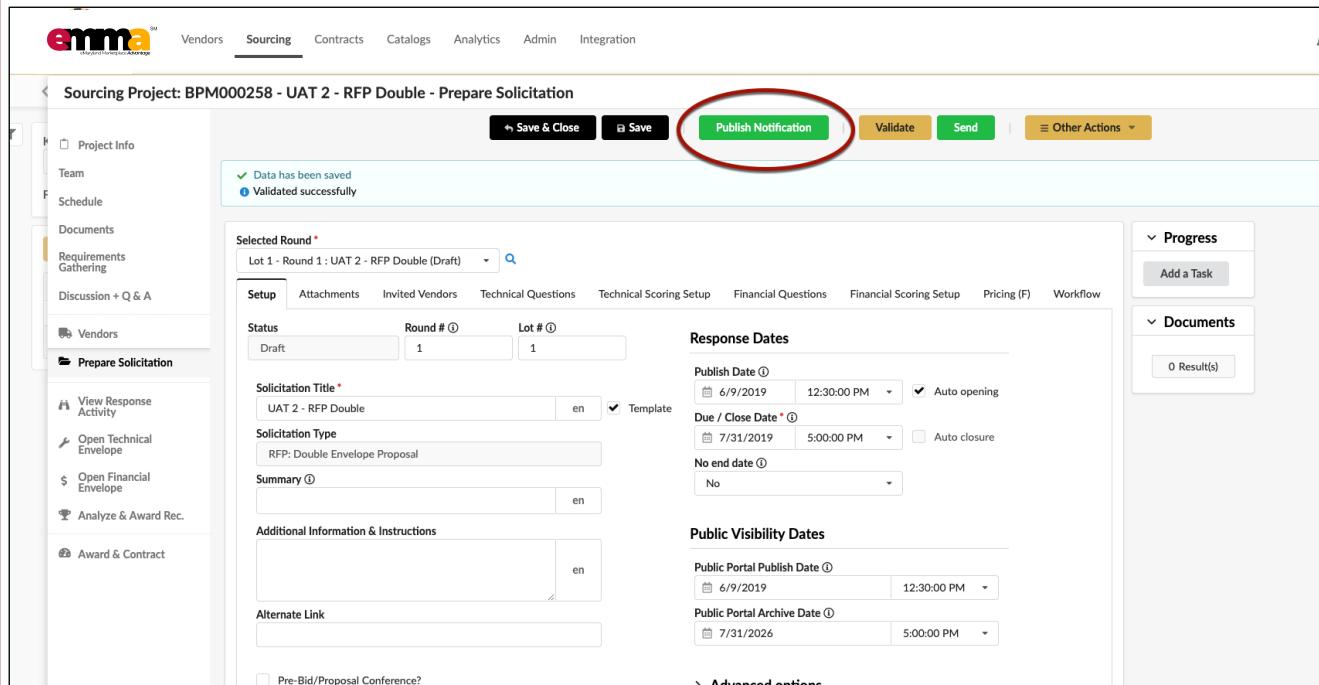


The screenshot shows the eMMA interface for creating a large procurement RFP. The top navigation bar includes links for Vendors, Sourcing (which is selected), Contracts, Catalogs, Analytics, Admin, and Integration. The main content area is titled 'Sourcing Project: BPM000258 - UAT 2 - RFP Double - Prepare Solicitation'. On the left, a sidebar lists various project management tasks: 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 'Prepare Solicitation' section is currently active. The main form contains fields for 'Selected Round' (Lot 1 - Round 1: UAT 2 - RFP Double (Draft)), 'Status' (Draft), 'Round # (1)', 'Lot # (1)', 'Solicitation Title' (UAT 2 - RFP Double), 'Solicitation Type' (RFP: Double Envelope Proposal), 'Summary', 'Additional Information & Instructions', and 'Alternate Link'. There are sections for 'Response Dates' (Publish Date: 6/9/2019, 12:30:00 PM, Auto opening checked; Due / Close Date: 7/31/2019, 5:00:00 PM, Auto closure unchecked; No end date: No), 'Public Visibility Dates' (Public Portal Publish Date: 6/9/2019, 12:30:00 PM; Public Portal Archive Date: 7/31/2026, 5:00:00 PM), and an 'Advanced options' section. At the top right, there are buttons for 'Save & Close', 'Save', 'Notify Commodity Vendors' (highlighted with a red oval), 'Validate', 'Send', and 'Other Actions'. To the right, there are sections for 'Progress' (Add a Task) and 'Documents' (0 Result(s)).

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 interface for creating a large procurement RFP. The top navigation bar includes links for Vendors, Sourcing (which is selected), Contracts, Catalogs, Analytics, Admin, and Integration. The main content area is titled 'Sourcing Project: BPM000258 - UAT 2 - RFP Double - Prepare Solicitation'. A message at the top indicates 'Data has been saved' and 'Validated successfully'. The 'Publish Notification' button is highlighted with a red circle. The page contains several sections: 'Selected Round' (Lot 1 - Round 1 : UAT 2 - RFP Double (Draft)), 'Setup' (Status: Draft, Round #: 1, Lot #: 1), 'Solicitation Title' (UAT 2 - RFP Double), 'Solicitation Type' (RFP: Double Envelope Proposal), 'Summary' (empty), 'Additional Information & Instructions' (empty), 'Alternate Link' (empty), and 'Response Dates' (Publish Date: 6/9/2019, 12:30:00 PM, Auto opening checked; Due / Close Date: 7/31/2019, 5:00:00 PM, Auto closure unchecked). There are also sections for 'Public Visibility Dates' (Portal Publish Date: 6/9/2019, 12:30:00 PM; Portal Archive Date: 7/31/2026, 5:00:00 PM). On the left, a sidebar lists project management tasks: 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. On the right, there are sections for Progress (Add a Task) and Documents (0 Result(s)).