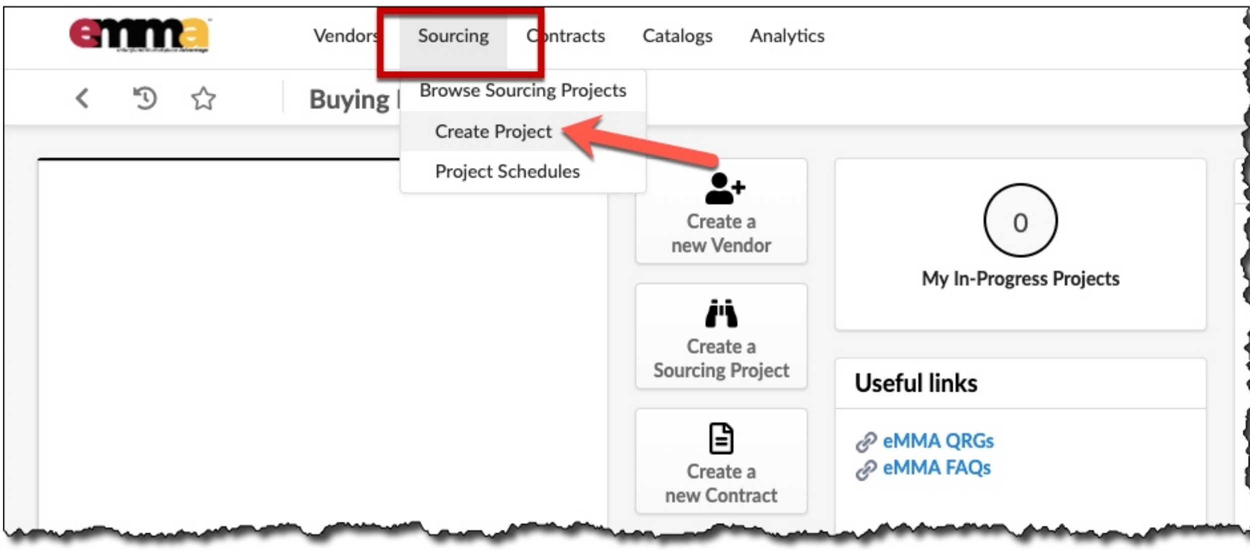
## OVERVIEW

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

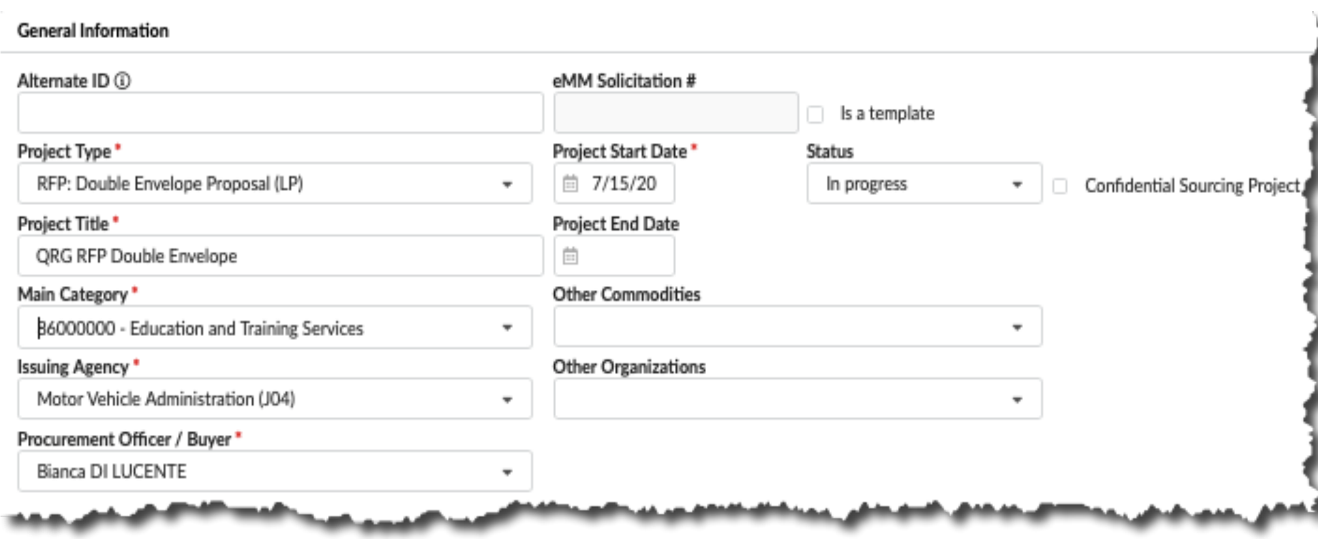
**NOTE:** *All fields marked with a red asterisk to the right are required and must be completed in order to proceed*

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*




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

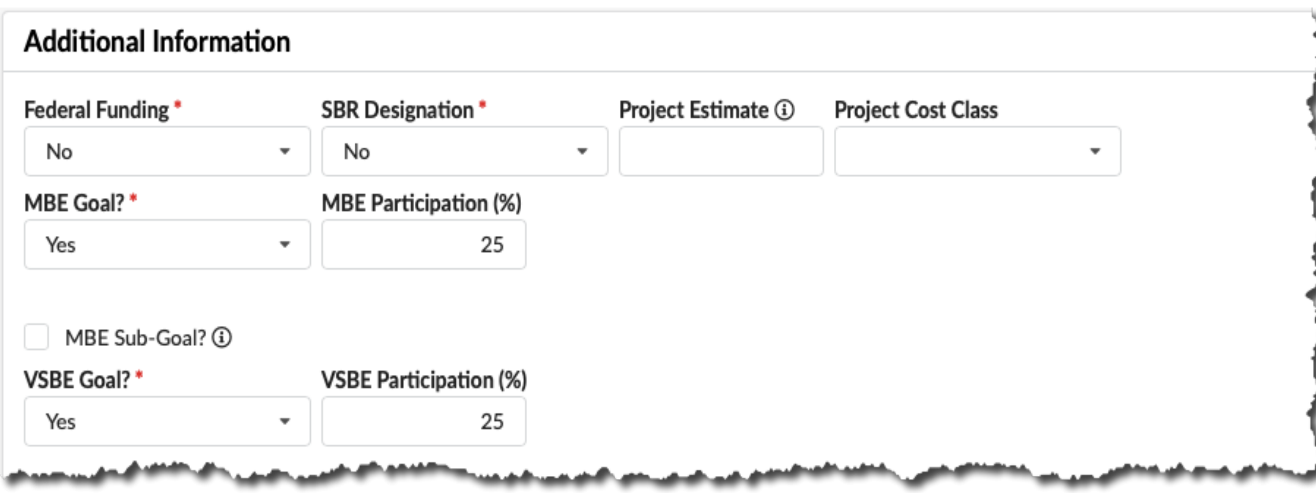
## SECTION 3: Additional Information

**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*

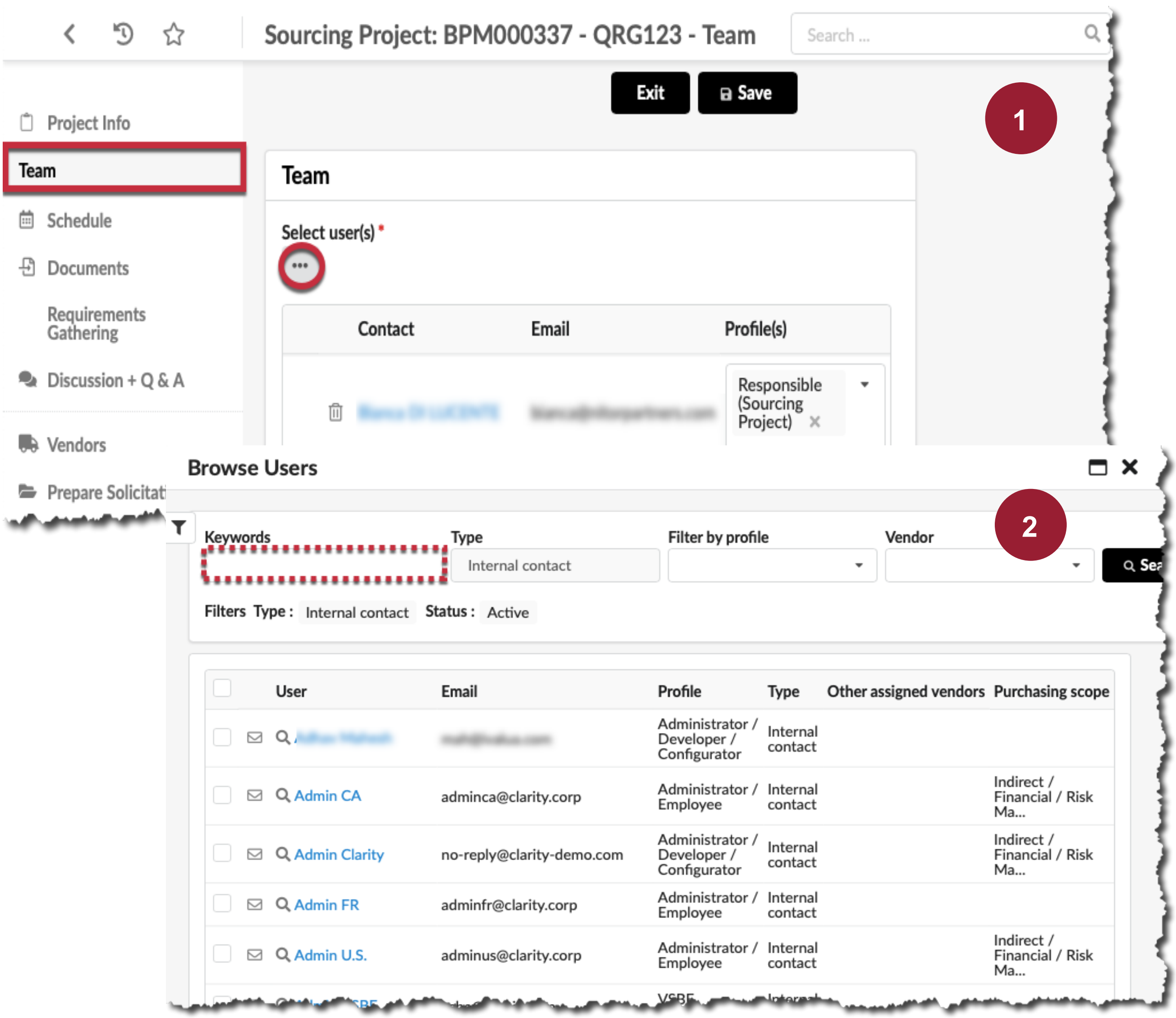
➢ **Once the required criteria is complete, click the "Save" button at the top of the screen**



## SECTION 4: Create a Team

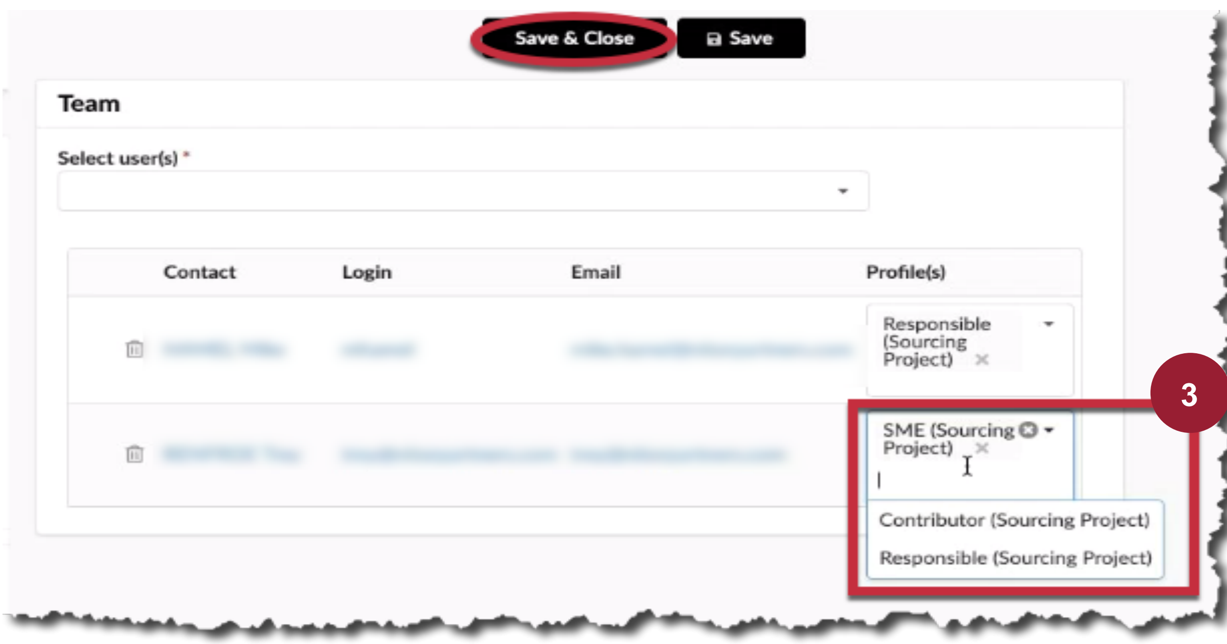
The Owner of the Sourcing Project may choose to create a **Team** for the specific event to drive transparency and collaboration through out the process.

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.



## 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*

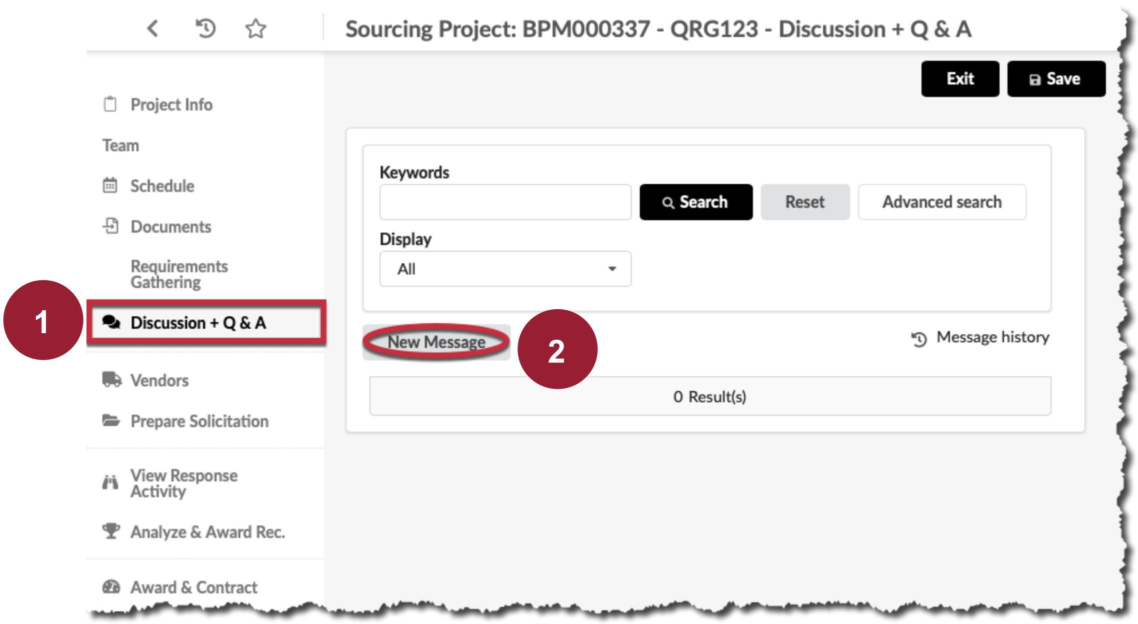



➢ **Once the required criteria is complete, click the "Save & Close" button at the top of the screen**

## 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.

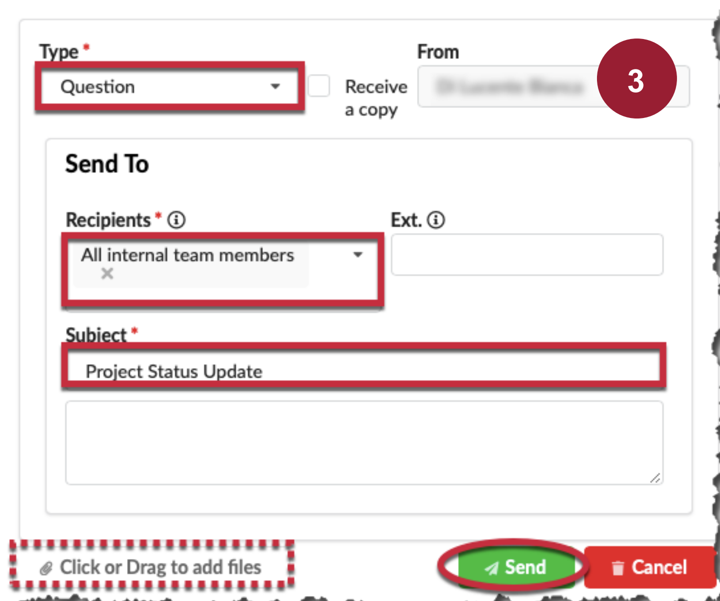



**NOTE:** *All fields marked with a red asterisk to the right are required and must be completed in order to proceed*

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**

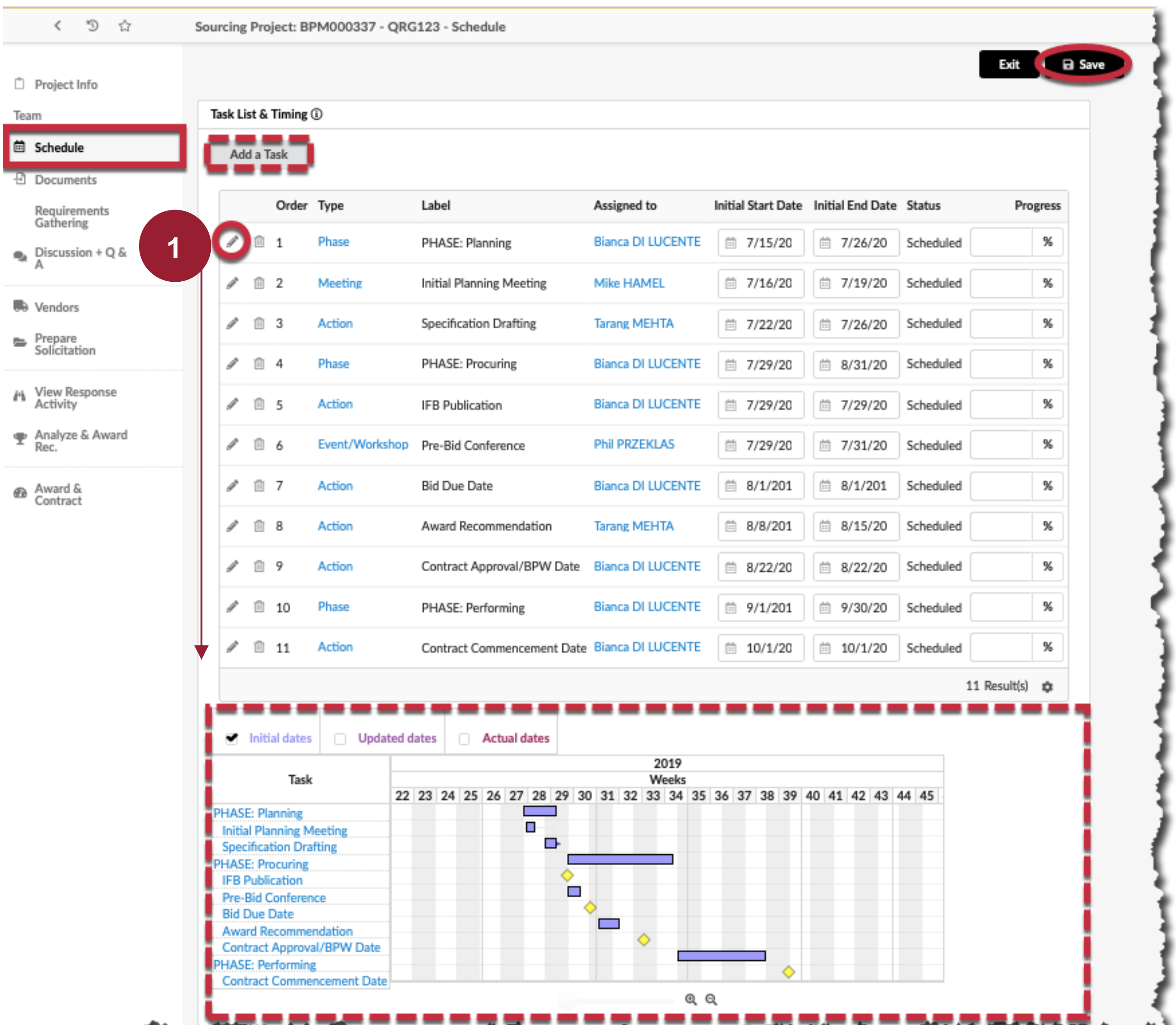


## SECTION 6: Create a Sourcing Project Schedule

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 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*




| 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 | % |

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

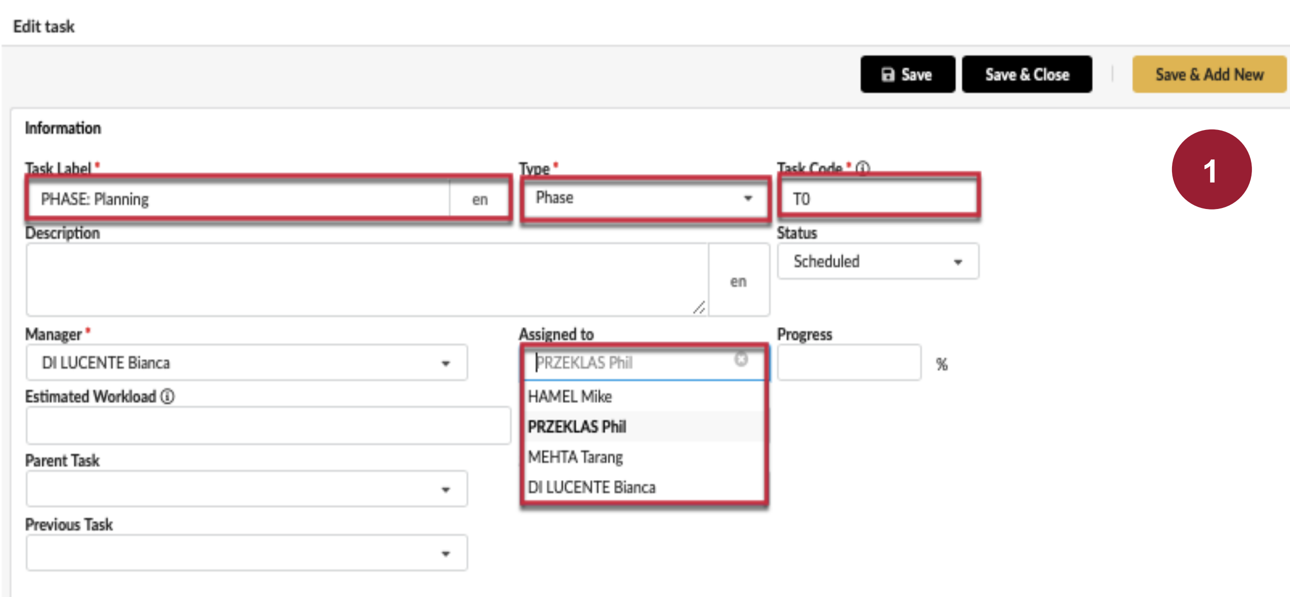
## SECTION 6: Create a Sourcing Project Schedule – Editing Tasks (cont.)

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*

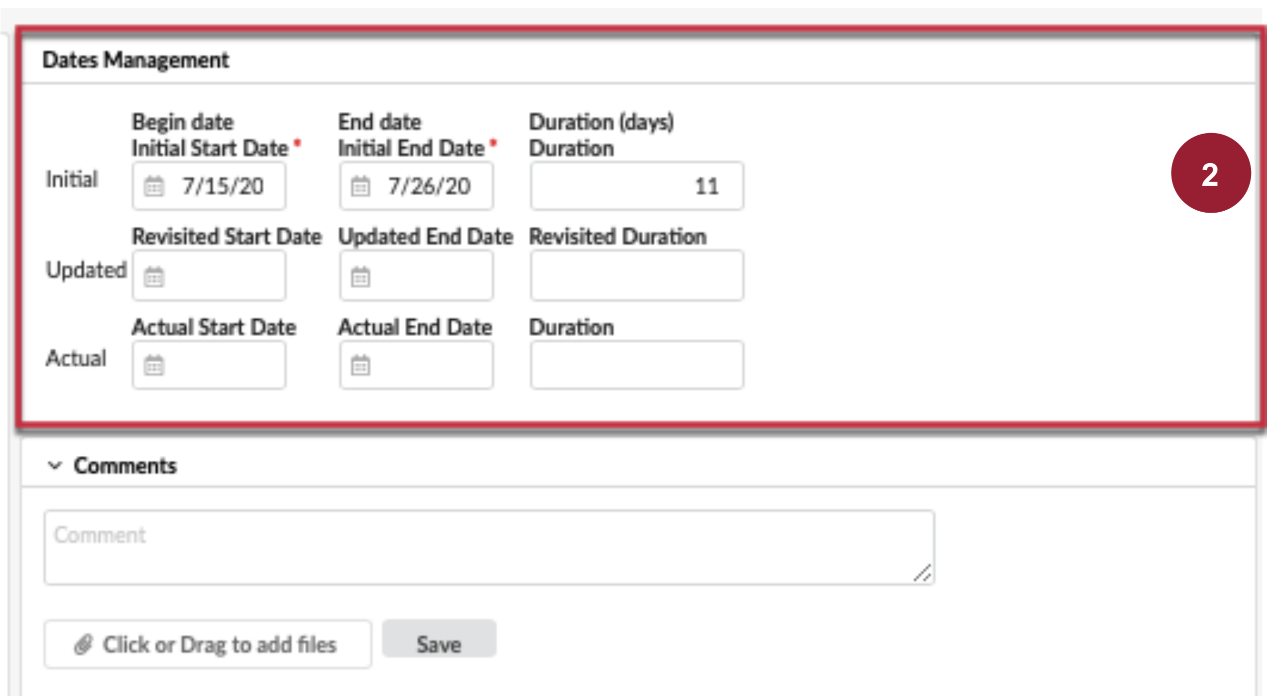
1. Review the **Task Information** fields:
    1. **Task Label:** *Enter a clear and concise Task Label; additional details may be captured in the* ***Description*** *box*
    2. **Type:** *Select the appropriate option from the drop-down menu (ex. Phase, Meeting, Action)*
    3. **Task Code:** *This 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*

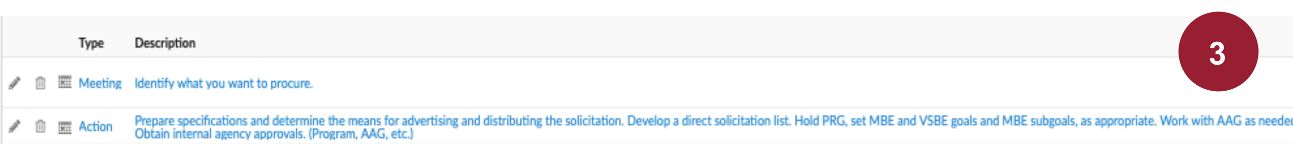


## SECTION 6: Create a Sourcing Project Schedule – Editing Tasks (cont.)

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*




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

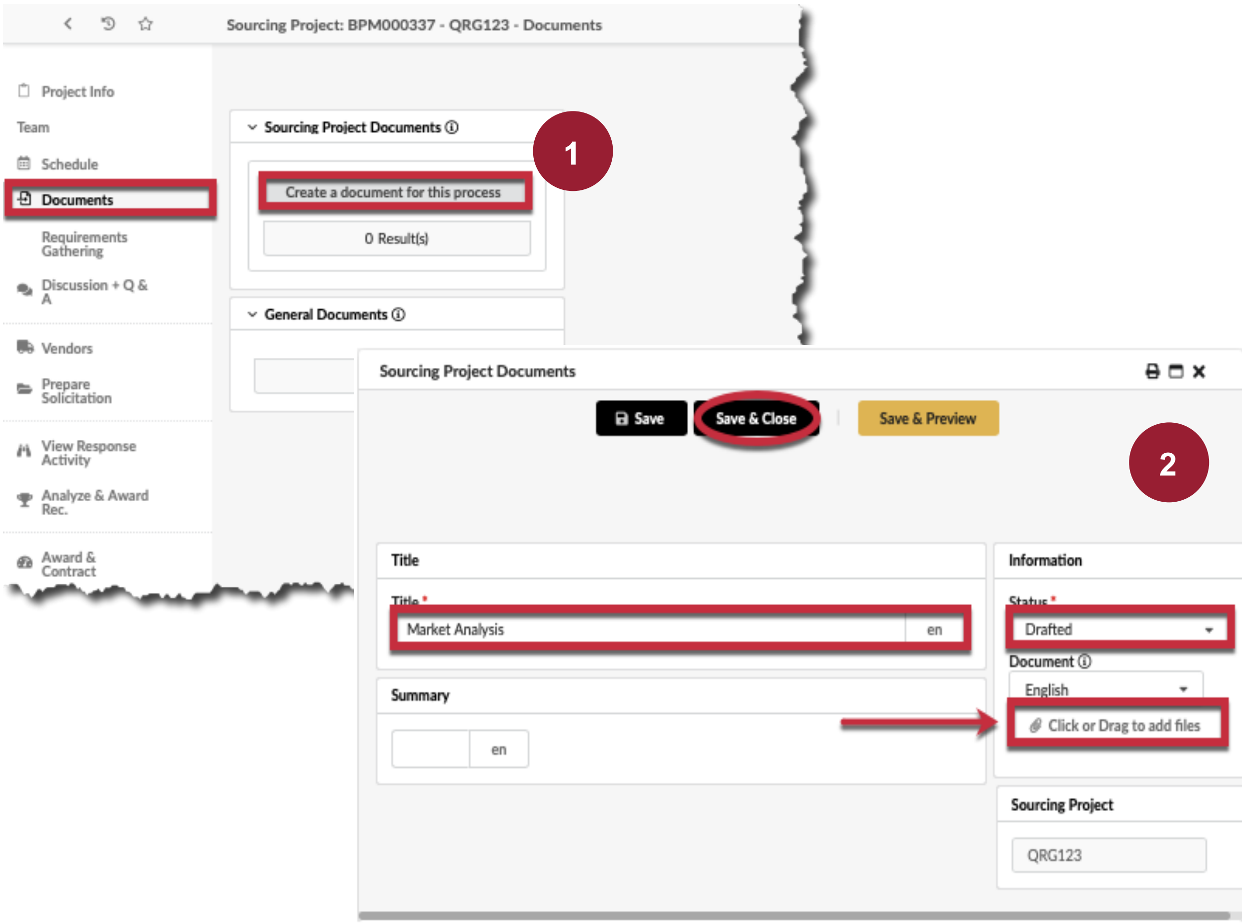



➢ Click the **"Save & Close"** button at the top of the screen to incorporate all edits and return to the **Schedule** home screen

## 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.




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

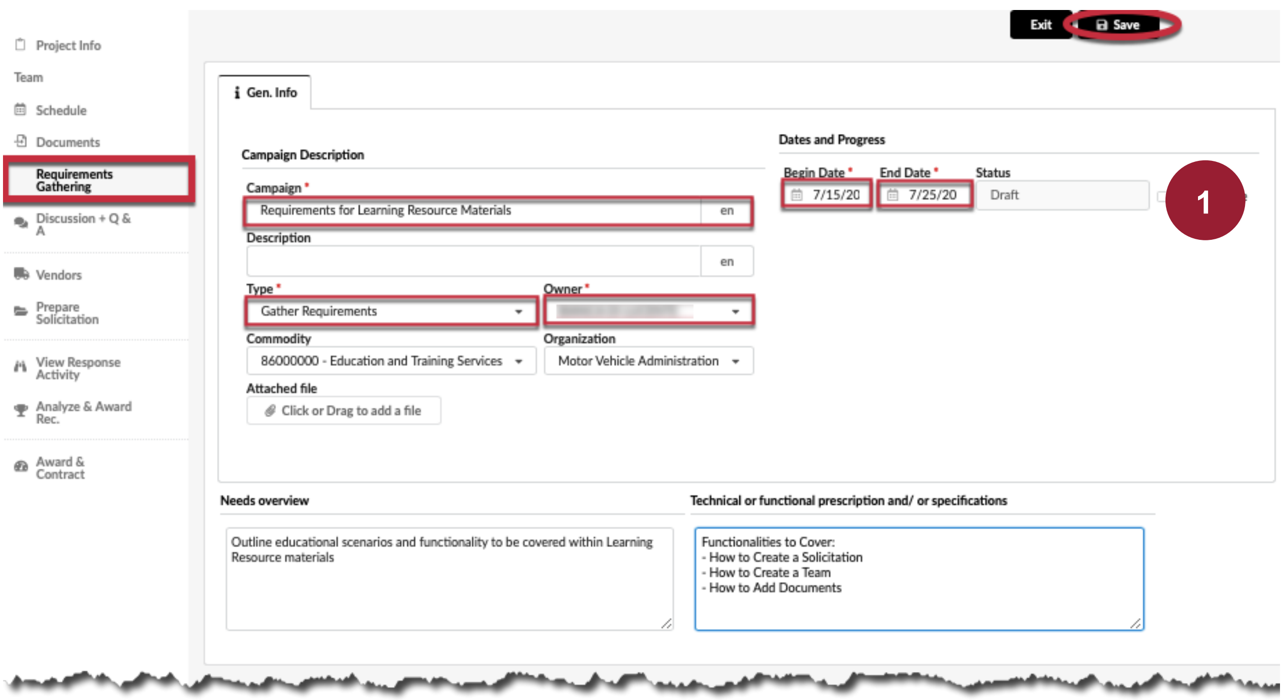
**NOTE:** *The Documents added to this section are only visible by the internal team to the Sourcing Project. This is an appropriate place to store such items as market analysis, research etc. These documents can be copied to the solicitation and shared with vendors if desired.*

## 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*

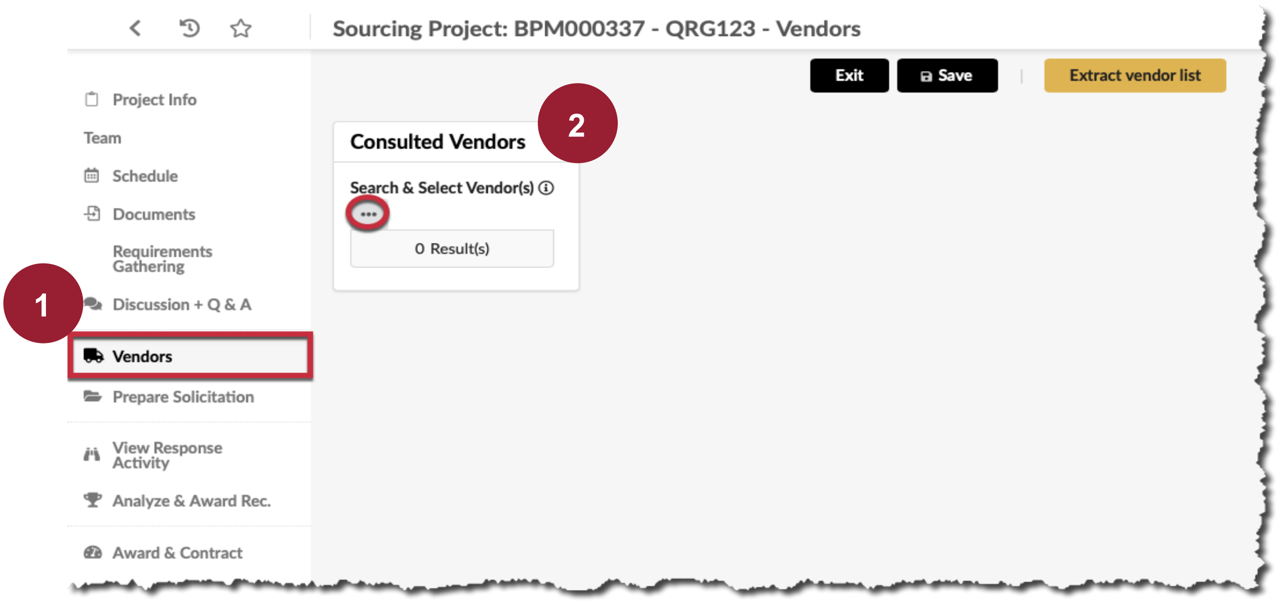



- **Once the required criteria is complete, click the "Save" button at the top of the screen**

## SECTION 9: Select Vendors

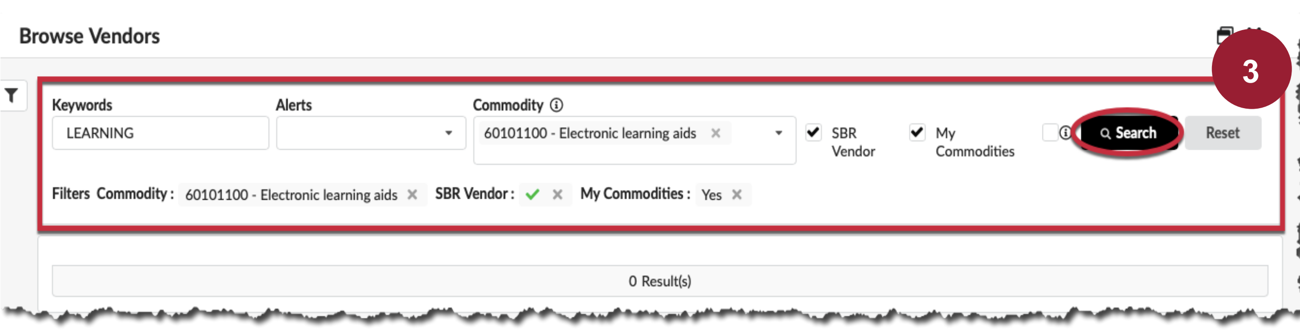
By selecting the ***Vendors*** step on the left side of the screen, the Project Owner will be able to search for and browse **Consulted Vendors** for the RFP Sourcing Project based on identified criteria and requirements.

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.




**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.



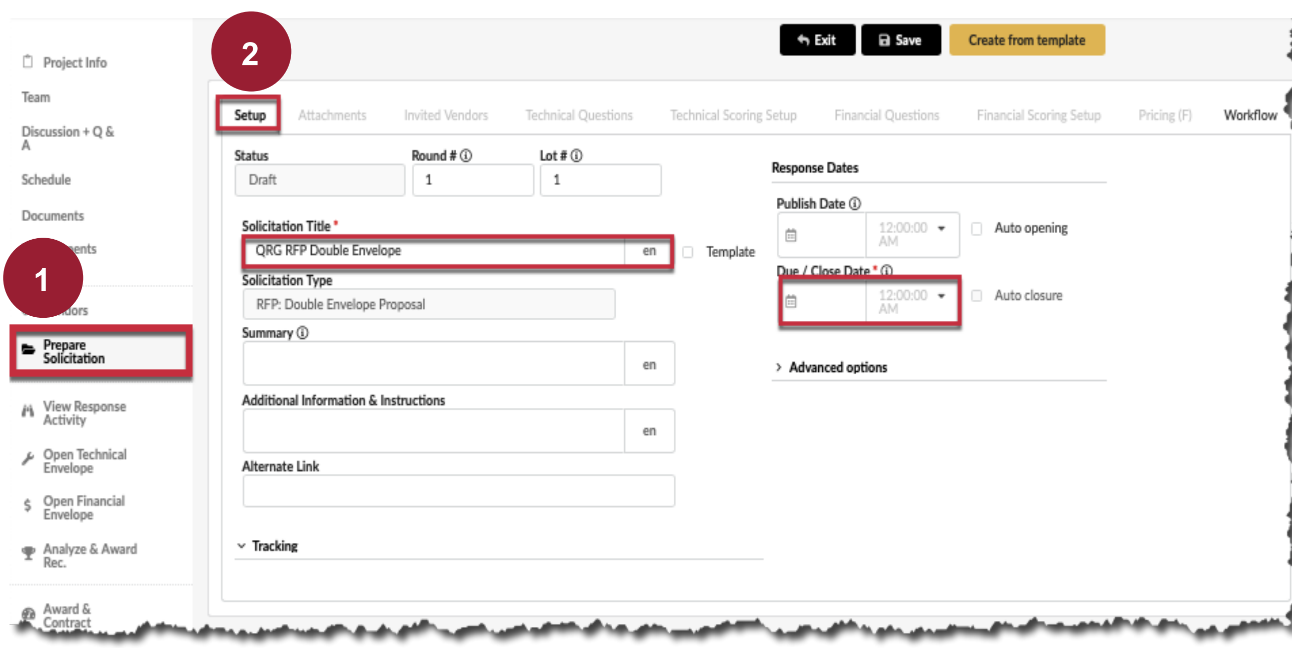

**IMPORTANT:** For solicitations that require a longer period of time, the list of vendors receiving notifications may need to be updated/refreshed to capture newly registered vendors for a specific category code.

## 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.*

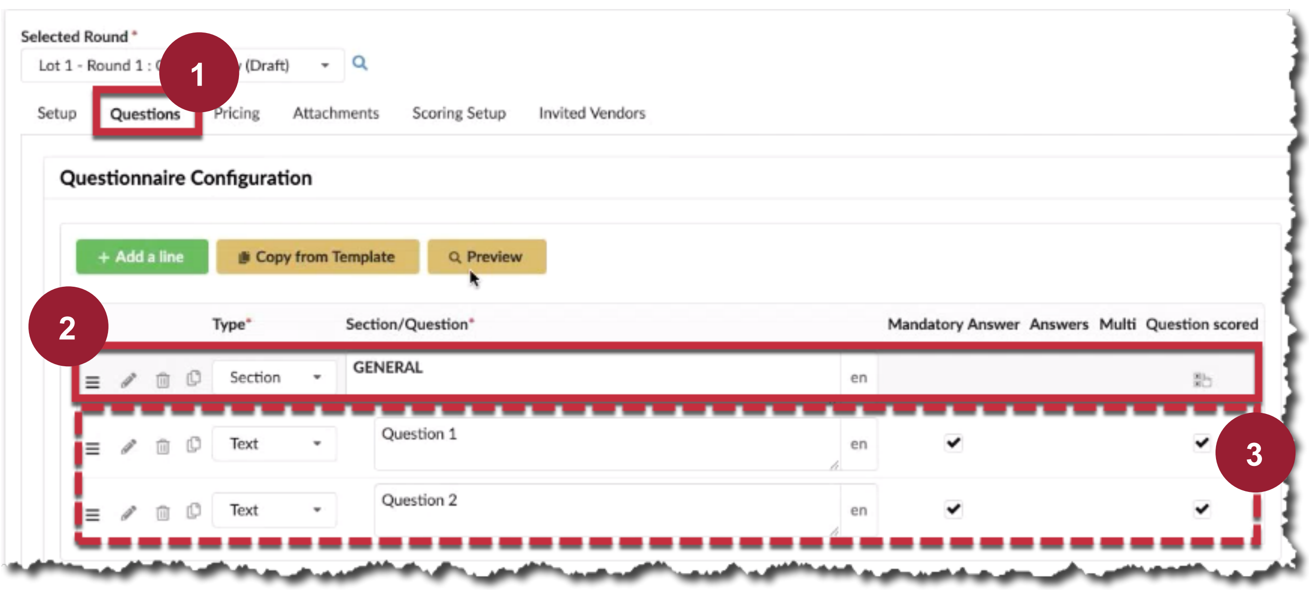



➢ **Once the required criteria is complete, click the "Save" button at the top of the screen**

## 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*




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

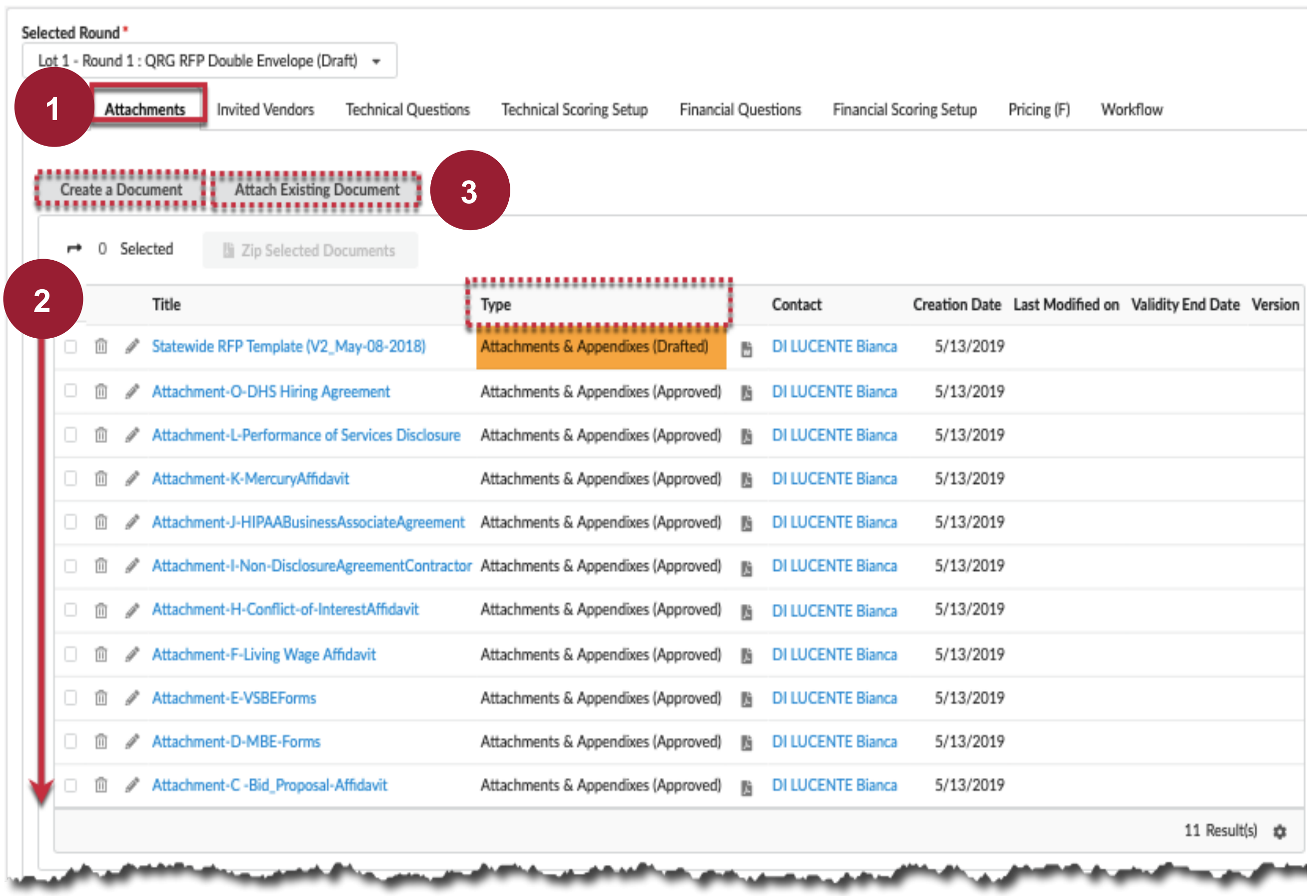
➢ **Once the required criteria is complete, click the "Save" button at the top of the screen**

## 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".*

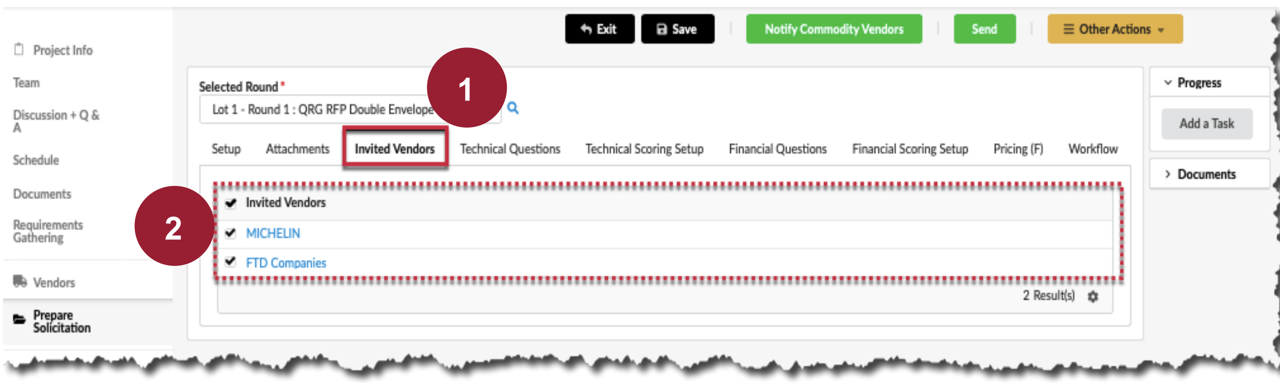



➢ **Once the required criteria is complete, click the "Save" button at the top of the screen**

## 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*



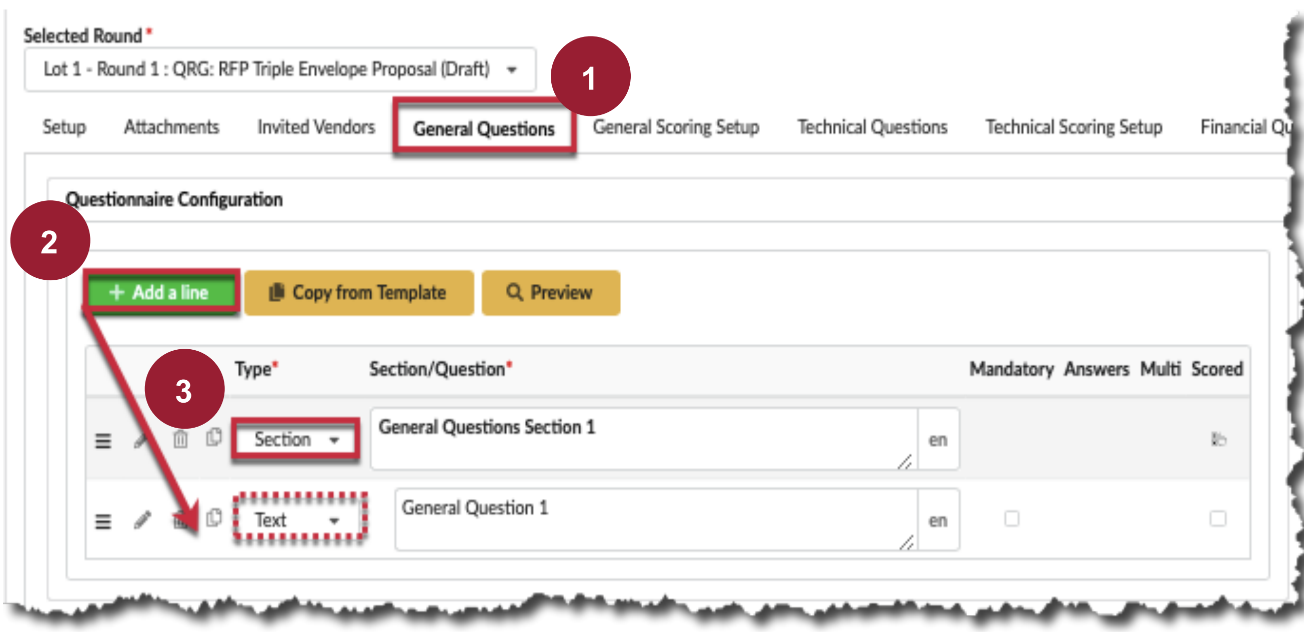

➢ **Once the required criteria is complete, click the "Save" button at the top of the screen**

## 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. 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*

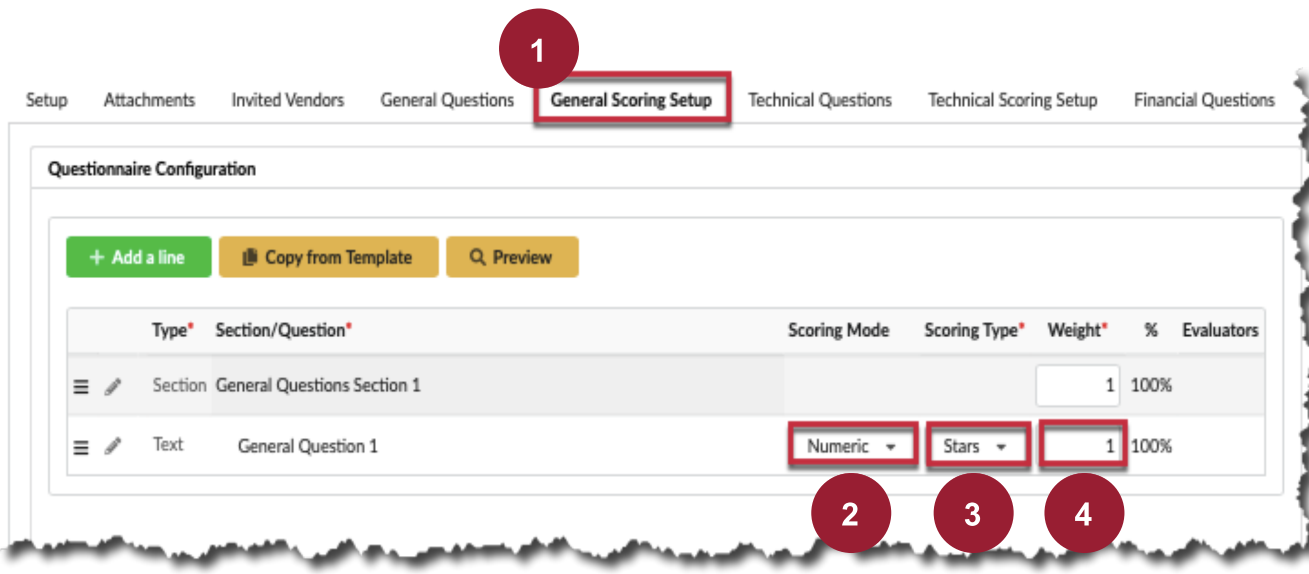



**NOTE:** *The check boxes on the right side of the line items need to be managed in order to determine what Sections / Questions are mandatory and / or scorable*

## 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*



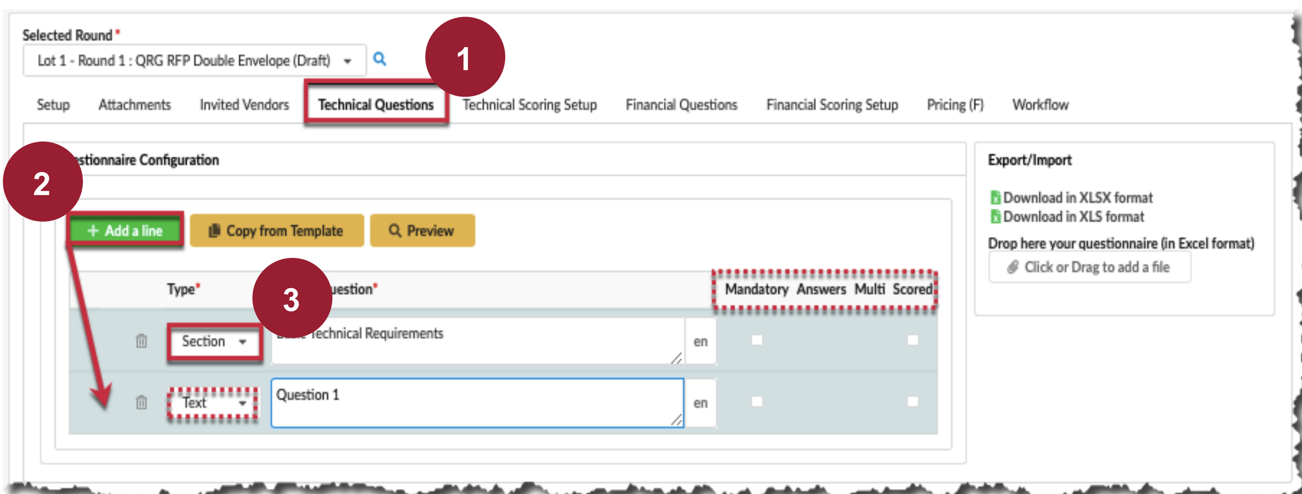

➢ **Once the required criteria is complete, click the "Save" button at the top of the screen**

## 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*

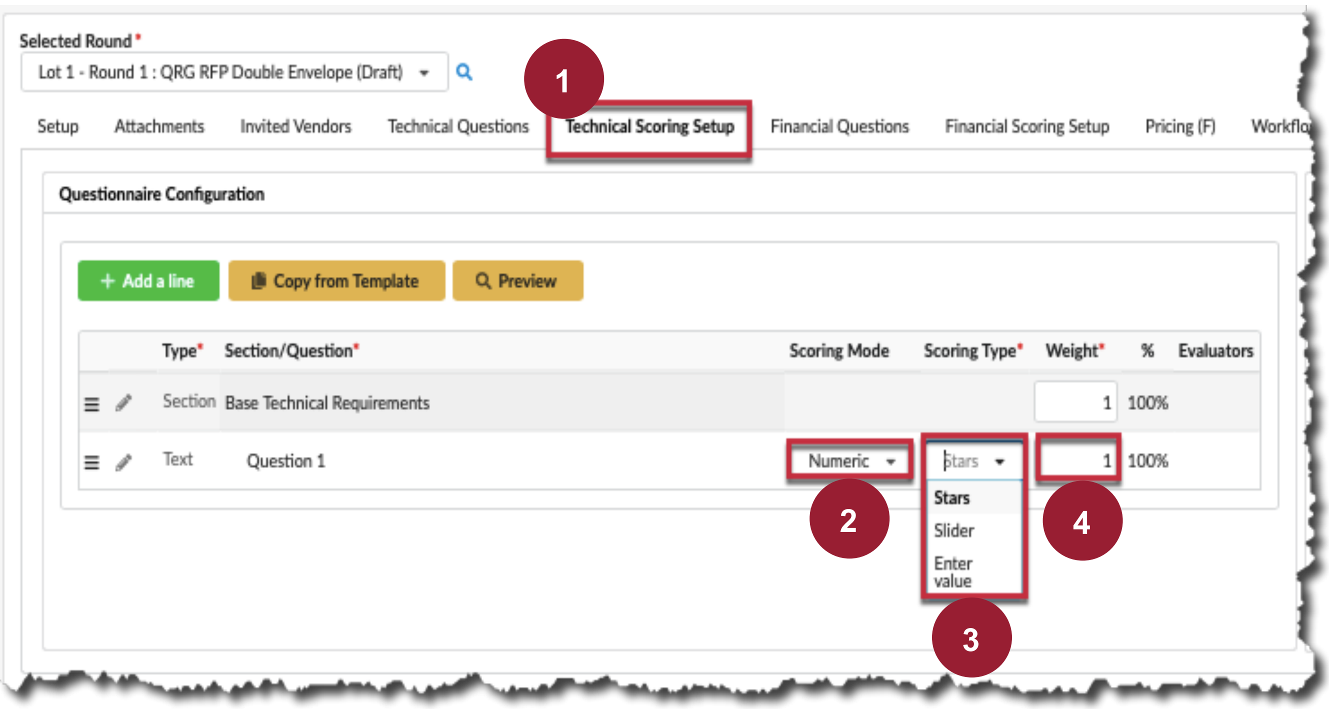



**NOTE:** *The check boxes on the right side of the line items need to be managed in order to determine what Sections / Questions are mandatory and / or scorable*

## 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*



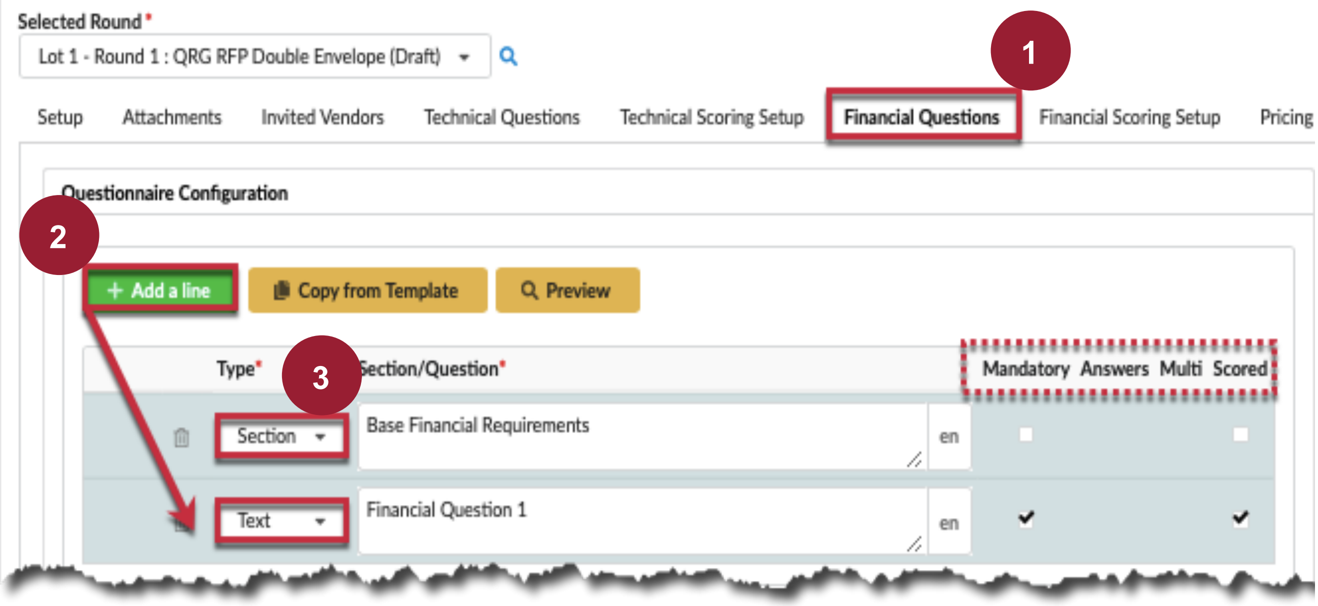

➢ **Once the required criteria is complete, click the "Save" button at the top of the screen**

## 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*



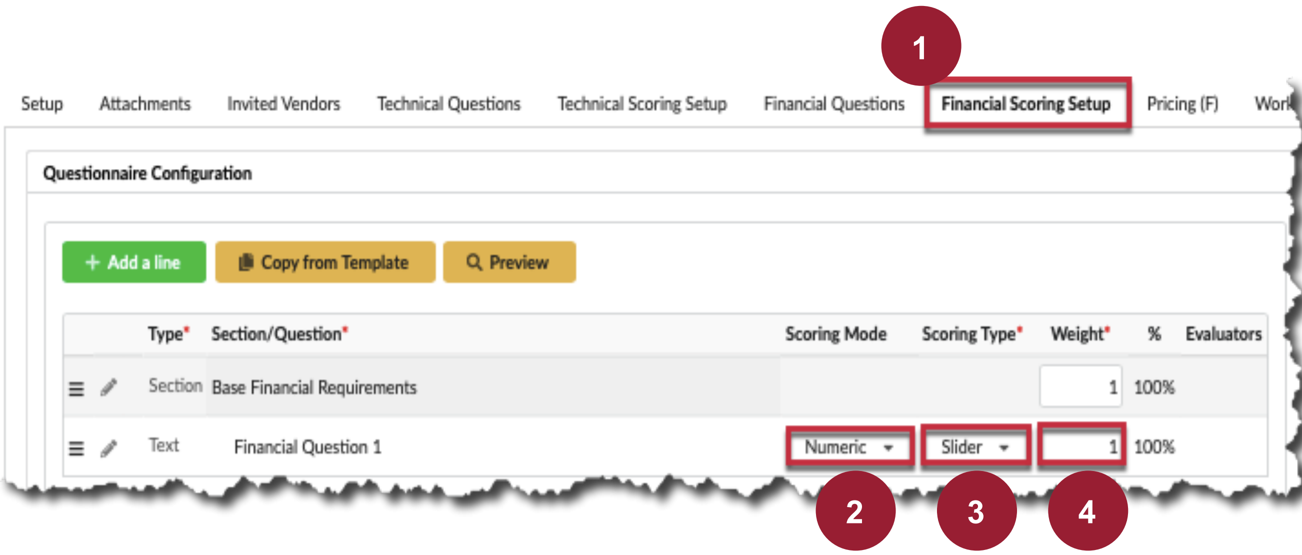

**NOTE:** *The check boxes on the right side of the line items need to be managed in order to determine what Sections / Questions are mandatory and / or scorable*

➢ **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*

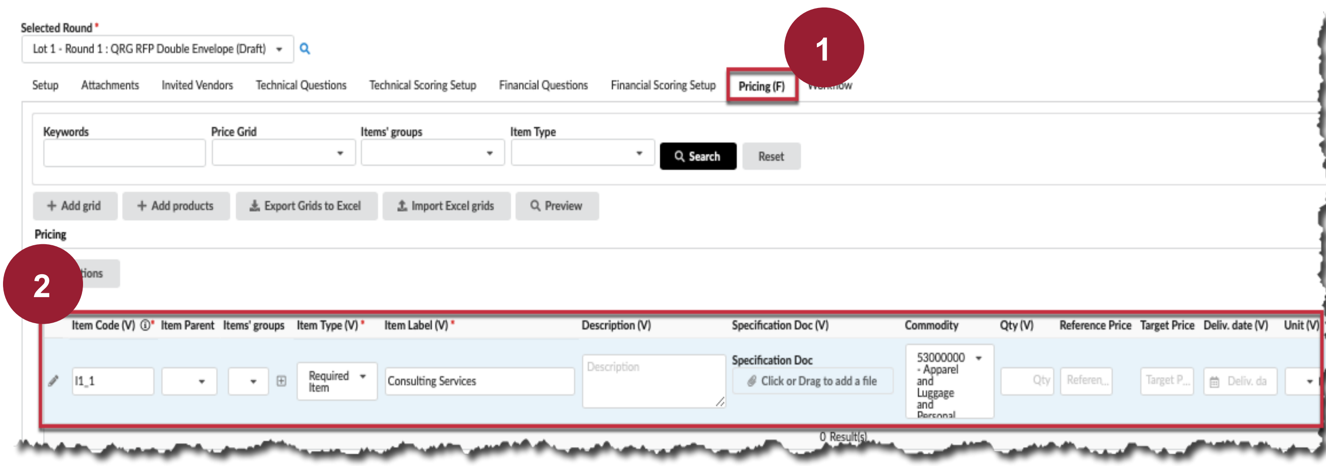



➢ **Once the required criteria is complete, click the "Save" button at the top of the screen**

## 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*




**TIPS:**

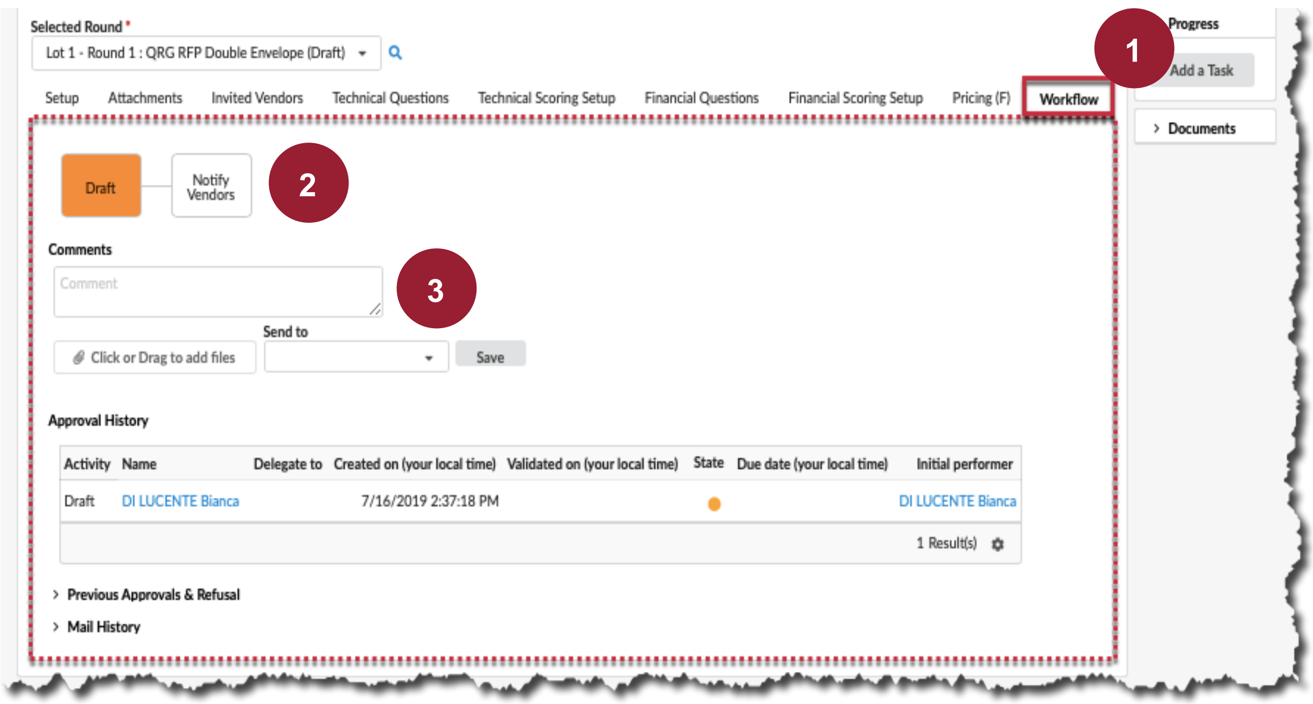
- **Item Code:** *This is a system generated field and does not require editing by the Project Owner*
- **Item Label:** *Ensure to write a clear and concise Item Label; this is what the vendor will use as an indicator when preparing pricing submissions*

➢ **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*

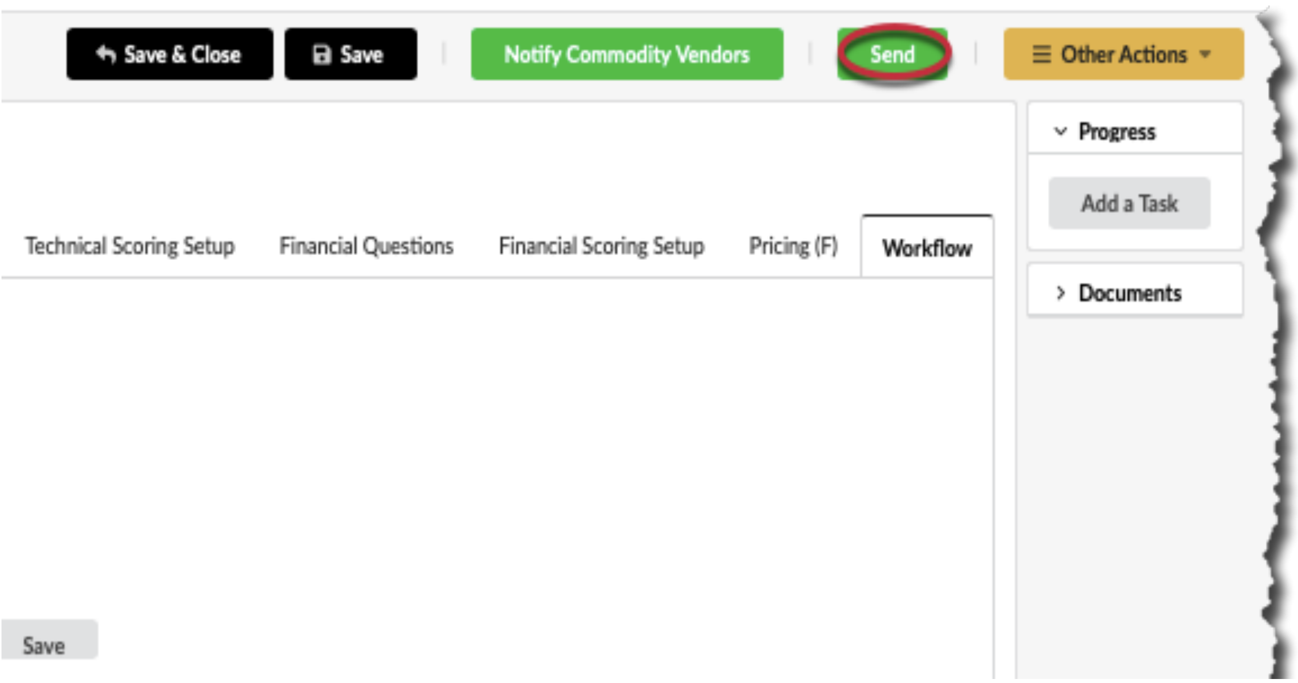



➢ **Once the required criteria is complete, click the "Save" button at the top of the screen**

## SECTION 11: Send the Solicitation

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

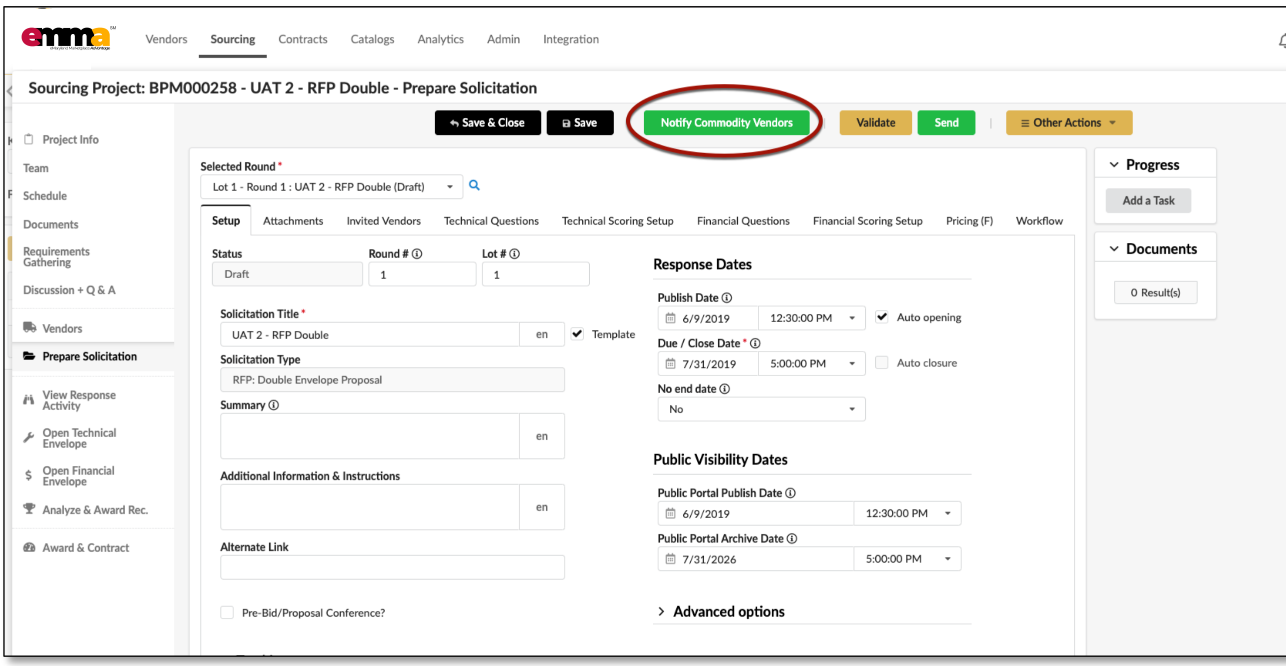
**IMPORTANT:** Click "Send" once only.
**NOTE:** *The solicitation will be made public on the date / time as scheduled within the Project Info step*



## 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.*



## 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.*