Create an RFP Double or Triple Envelope Solicitation in eMMA

Quick Reference Guide

Overview

This Quick Reference Guide (QRG) is intended for Buyers who need to create a large procurement Request for Proposal (RFP) Double Envelope and Triple Envelope sourcing projects in the eMaryland Marketplace Advantage (eMMA). It shows you how to create an RFP solicitation from creation to sending out your published solicitation. RFPs typically involve solicitations worth over $50,000 and involve purchasing services or a combination of products and services.

This QRG is broken down into 9 sections:

NOTE: For best results, use the Google Chrome browser to access eMMA.

Step-by-Step Instructions

Create an RFP Double Envelope Proposal

NOTE: This QRG uses diagrams with specific callouts to show required and optional fields in forms. A yellow callout with a red border indicates a required field, while yellow callouts with a black border indicate optional fields. Letters within the callouts correspond to the explanations below the diagram.

1. Navigate to eMMA at https://emma.maryland.gov and click the **State SSO Login (Secure Auth)** button or the **MDOT SSO Login (MSAzure)** button, and log in with your credentials, if necessary.

2. Click the **Sourcing** tab at the top of the screen and select **Create Project** from the drop-down menu that opens.

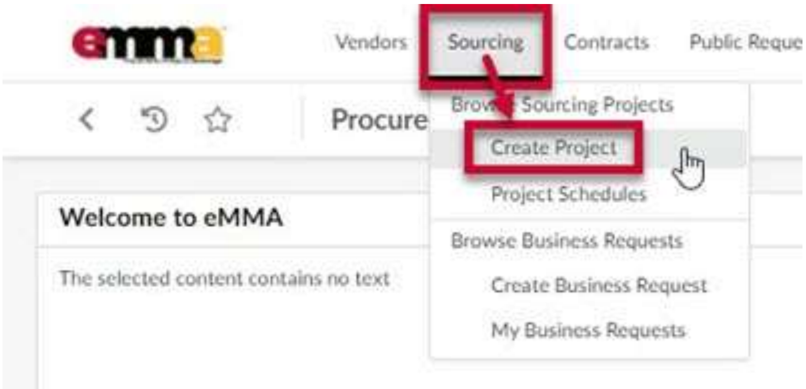


Figure 1: The Sourcing tab and Create Project option in the drop-down menu.

3. Enter information in the **General Information** section of the form. A red asterisk (*) indicates a required field. The diagram below shows required fields described in more detail below.

   NOTE: Additional fields may display depending on your selections.

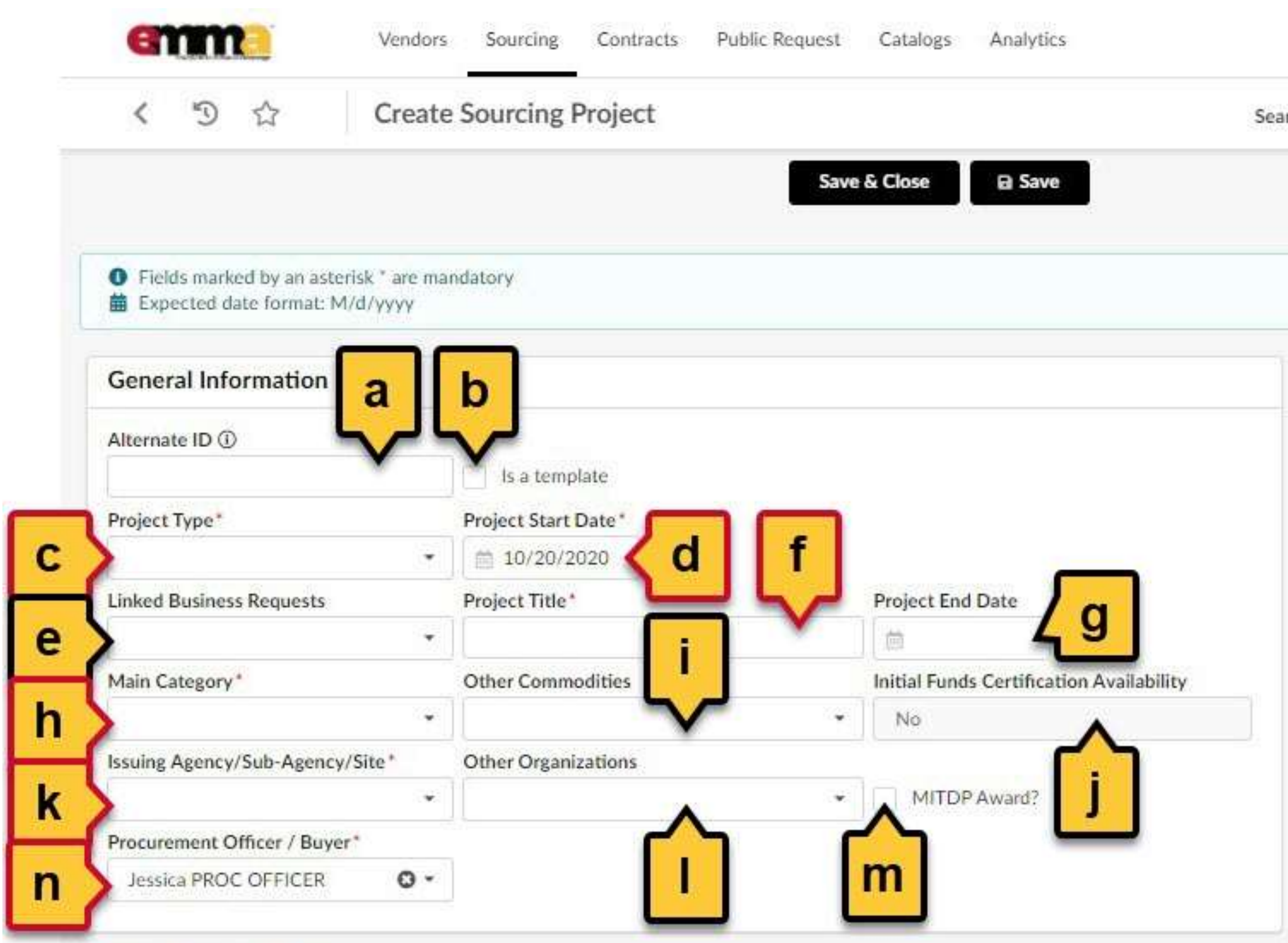


Figure 2: The General Information section and fields for creating a Sourcing Project in eMMA.

a. **Alternate ID:** This field is an additional identifier. If you have a Financial Management Information System (FMIS) number, external project number or an internal contract number, enter it here. If not, then skip this field.

b. **Is a template** (checkbox)**:** Click this checkbox if you plan to make this sourcing project a template for other projects.

c. **Project Type (*):** Click this field to open the drop-down menu and select the **RFP: Double Envelope Proposal (LP)** or **RFP: Triple Envelope Proposal (LP)** project type.

d. **Project Start Date (*):** Click this field to select a date on which to start the project. If no date is selected, eMMA will default to the date you are creating the sourcing project as the Project Start Date.

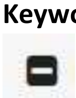
e. **Linked Business Requests:** Click this field to search for a Business Request if you need to link one to your new sourcing process.

   NOTE: Clicking **See All** opens a window in which all Business Requests are listed. Search for a term in the **Keywords** field and click the **Search** button to return relevant results. Select a business request from this list. The business request populates in the field.

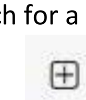
f. **Project Title (*):** Enter a title for your RFP in this field.

g. **Project End Date:** Click this field if you know the date your project will end.

h. **Main Category (*):** Click this field to open the drop-down menu and select one main category for your project or click **See All** at the bottom of the menu.

   NOTE: Clicking **See All** opens a window in which all categories are listed. Search for a term in the **Keywords** field and click the **Search** button to return relevant results. Use the plus  and minus  icons to the left of the category groups to expand and collapse them. Select a category from this list. The category populates in the field.

i. **Other Commodities:** Click this field to open the drop-down menu and select one or more additional categories for your project or click **See All** at the bottom of the menu. Selecting more commodities means you will get a broader scope of responses from vendors who can meet your project's needs.

   NOTE: Clicking **See All** opens a window in which all commodities are listed. Search for a term in the **Keywords** field and click the **Search** button to return relevant results. Use the plus  and minus  icons to the left of the commodity groups to expand and collapse them. It is imperative that you select as many and as detailed commodities as applies to your project. This ensures vendors from a wide range of commodities can find and bid on your solicitation. Select one or more commodity(ies) from this list and close the window. The commodity(ies) populates in the field.

j. **Initial Funds Certification Availability:** This field is system-generated. No further action required here.

k. **Issuing Agency/Sub-Agency/Site (*):** Click this field to open the drop-down menu and select appropriate Issuing Agency/Sub-Agency/Site for this project or click the **See All** option at the bottom of the menu.

NOTE: Clicking **See All** opens a window in which all Agencies are listed. Search for a term in the **Keywords** field and click the **Search** button to return relevant results. Use the plus and minus icons to the left of the agency groups to expand and collapse them. Select an agency from this list. The selected agency populates in the field.

l. **Other Organizations:** Click this field to open the drop-down menu and select one or more additional organizations related to your project or click the **See All** option at the bottom of the menu.

   NOTE: Clicking **See All** opens a window in which all organizations in your agency are listed. Search for a term in the **Keywords** field and click the **Search** button to return relevant results. Use the plus and minus icons to the left of the organizational groups to expand and collapse them. Select one or more organization(s) from this list and close the window. The organization(s) auto-populates in the field.

m. **MITDP Award?** (checkbox)**:** Click this checkbox only if you have a Major IT Development Project Award.

n. **Procurement Officer/Buyer (*):** This field auto-populates with your information. If this information is incorrect or needs to be changed, click this field to open the drop-down menu and select an option from the list. Click **See All** at the bottom of the menu to search through a list of all Procurement Officers/Buyers.

   NOTE: Clicking **See All** opens a window in which all Procurement Officers are listed. Search for a term in the **Keywords** field and click the **Search** button to return relevant results. Select a name from this list and close the window. The selected Procurement Officer/Buyer auto-populates in the field.

4. Enter information in the **Additional Information** section. A red asterisk (*) indicates a required field. The diagram below shows required fields described in more detail below.

   NOTE: Additional fields may display depending on your selections.

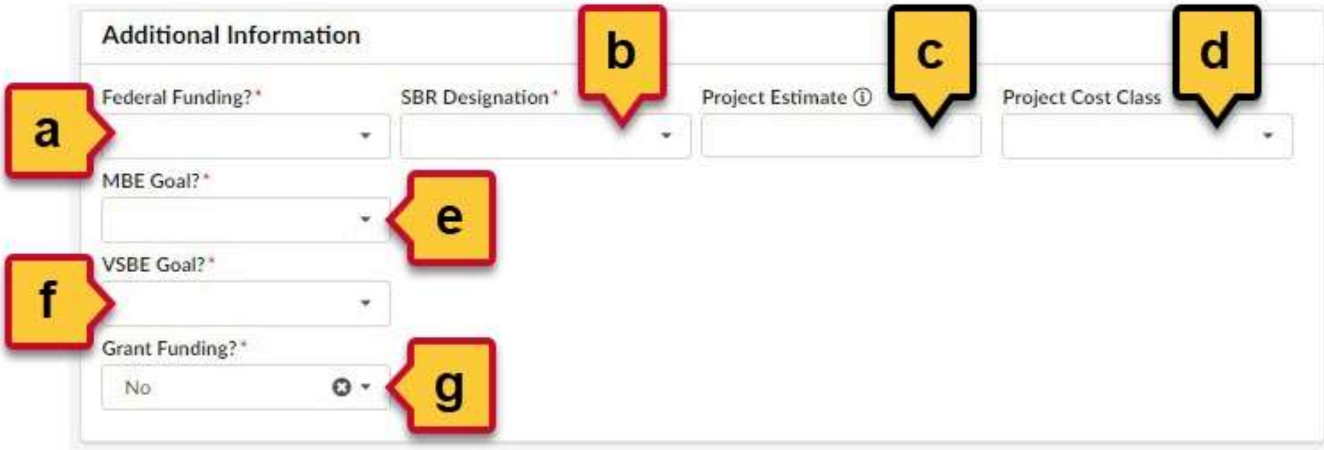


Figure 3: The Additional Information section and fields for creating a Sourcing Project in eMMA.

a. **Federal Funding? (*):** Does your project have federal funding? Click this field and select **Yes** or **No**.

b. **SBR Designation (*):** Does your project have a Small Business Reserve (SBR) designation? Click this field and select **Yes** or **No**.

c. **Project Estimate:** If you have an estimate of your project cost, enter it in this field.

d. **Project Cost Class:** Click this field and select a cost class for your project.

e. **MBE Goal? (*):** Does your project have a Minority-Owned Business Enterprise (MBE) goal? Click this field and select **Yes** or **No**.

   i. If you select **Yes**, two more fields display.

      1. **MBE Participation (%):** Enter the percentage for your MBE goal in this field.

      2. **MBE Sub-Goal?:** Does your project have MBE sub-goals? Click this field and select **Yes** or **No**.

         a. If you selected **Yes**, five new fields display. Enter the appropriate percentages in the respective fields as they apply to your project:

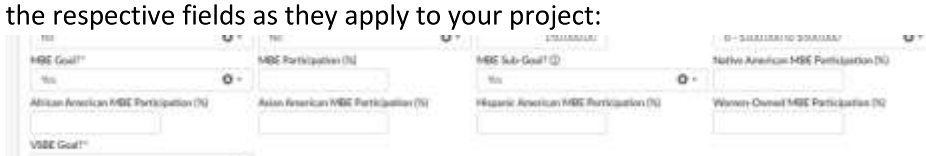


Figure 4: The MBE sub-goal fields.

            i. Native American MBE Participation (%)
            ii. African American MBE Participation (%)
            iii. Asian American MBE Participation (%)
            iv. Hispanic American MBE Participation (%)
            v. Women-owned MBE Participation (%)

f. **VSBE Goal? (*):** Does your project have a Veteran-Owned Small Business Enterprise (VSBE) goal? Click this field and select **Yes** or **No**.

   i. If you select **Yes**, one more field displays.

      1. **VSBE Percentage (%);** Enter the percentage for your VSBE goal in this field.

g. **Grant Funding? (*):** Does your project have grant funding? Click this field and select **Yes** or **No**.

i. If you select **Yes**, one more field displays.

1. **Grant Funding Amount ($) (*): Enter** the dollar amount for your grant funding.

5. Enter information in the **Apparent Awardee Approver Criteria** section. A red asterisk (*) indicates a required field. The diagram below shows required fields described in more detail below.

   IMPORTANT!! Make sure the selections in the Apparent Awardee Approval Criteria are correct **before you finish** entering information. **You cannot change these selections once the Sourcing Project is created.**

Figure 5: The Apparent Awardee Approval Criteria section and required fields to create a Sourcing Project in eMMA.

   a. **Fiscal Officer Approval? (*):** Does your project need approval by a Fiscal Officer? Click this field and select **Yes** or **No**.
   b. **Legal Approval? (*):** Does your project need Legal approval? Click this field and select **Yes** or **No**.
   c. **Agency Head Approval? (*):** Does your project need Agency Head approval? Click this field and select **Yes** or **No**.
   d. **Procurement Leadership Approval? (*):** Does your project need Procurement Leader approval? Click this field and select **Yes** or **No**.

6. Click the **Save** button at the top of the page.

Add Team Members

This process continues from the last step in the previous process. It shows how to add Team members to your sourcing project.

7. Click the **Teams** tab on the left-hand side-panel and click the ellipsis (three dots) button. The Browse Users window opens and displays a list of users in eMMA.

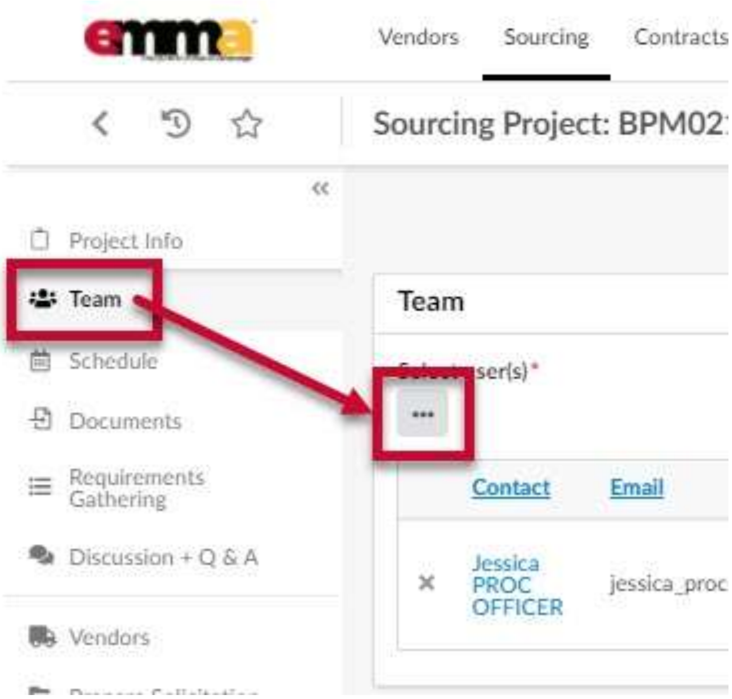


Figure 6: The Team Tab in the left-hand side-panel and the ellipsis (three dots) button.

8. Use the fields and filters to search for team members. Click the checkbox to the left of a team member you want to add. Repeat this step for each user on your Team and close the Browse Users window. The Team members you selected display on the Team page.

   NOTE: Team members can have more than one profile in eMMA. You can click on the team member's name to view information about their eMMA profile.

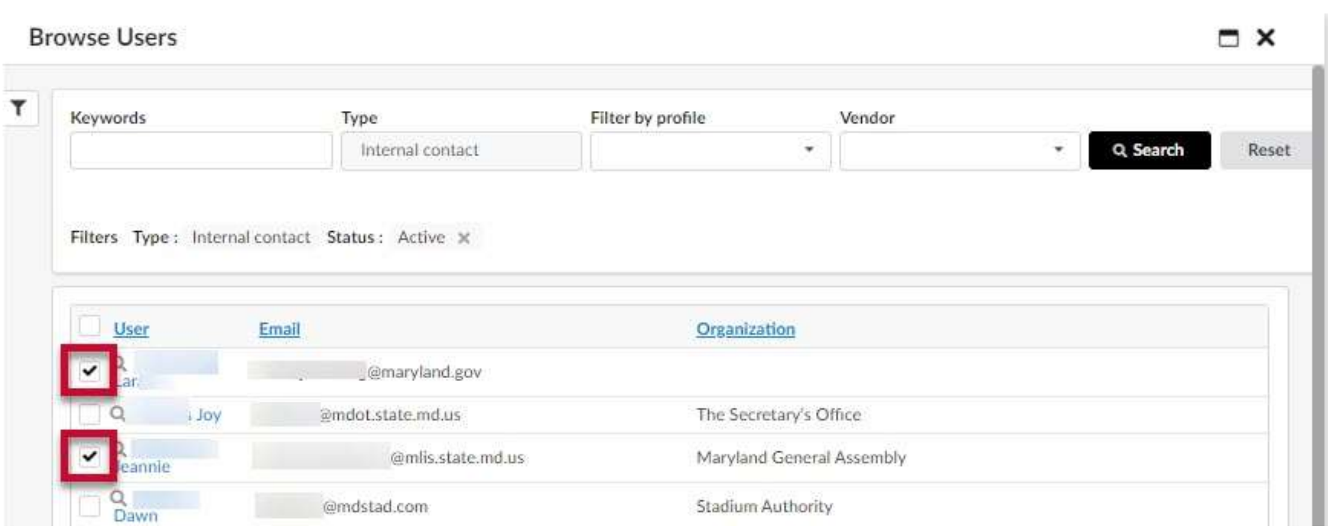


Figure 7: Two users selected in the Browse Users window.

9. (Optional) To remove a user, click the **X** to the left of the user's name.

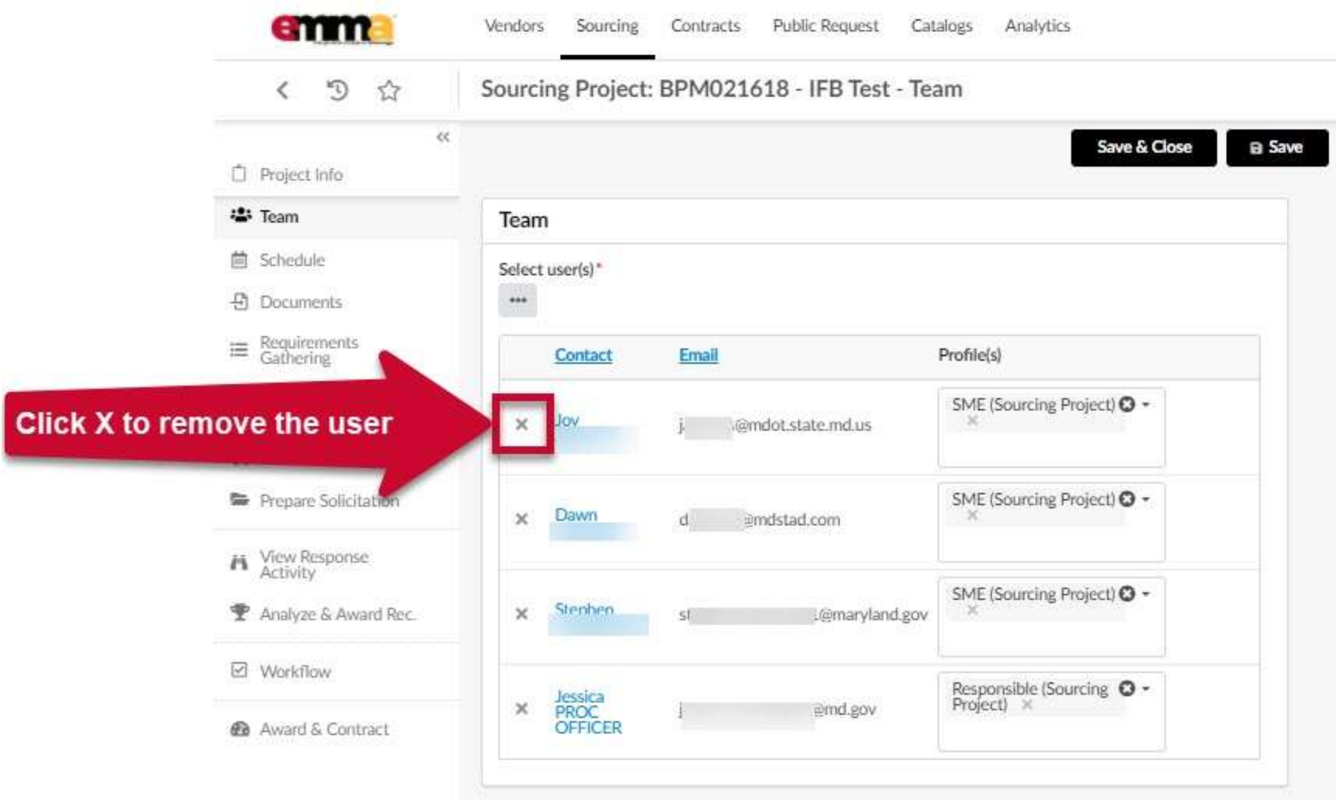


Figure 8: Users listed on the Team page and the X on the left to remove a user.

10. Click the field to the right of a user's email address, in the **Profile(s)** column, to open a drop-down menu.

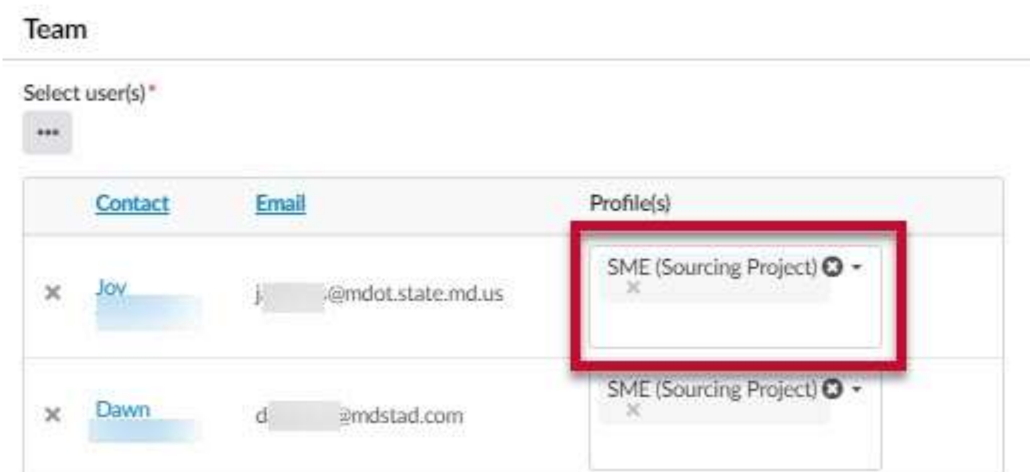


Figure 9: The Profile field to the right of a user's email.

11. Select a profile role for the user from the drop-down menu. By default, each user is assigned a role. Added users are assigned the SME (Sourcing Project) role, while the Procurement Officer is designated the Responsible (Sourcing Project) role by default. Profile roles and permissions are further defined below.

NOTE: You can assign multiple roles but only one Responsible profile role for the Team.

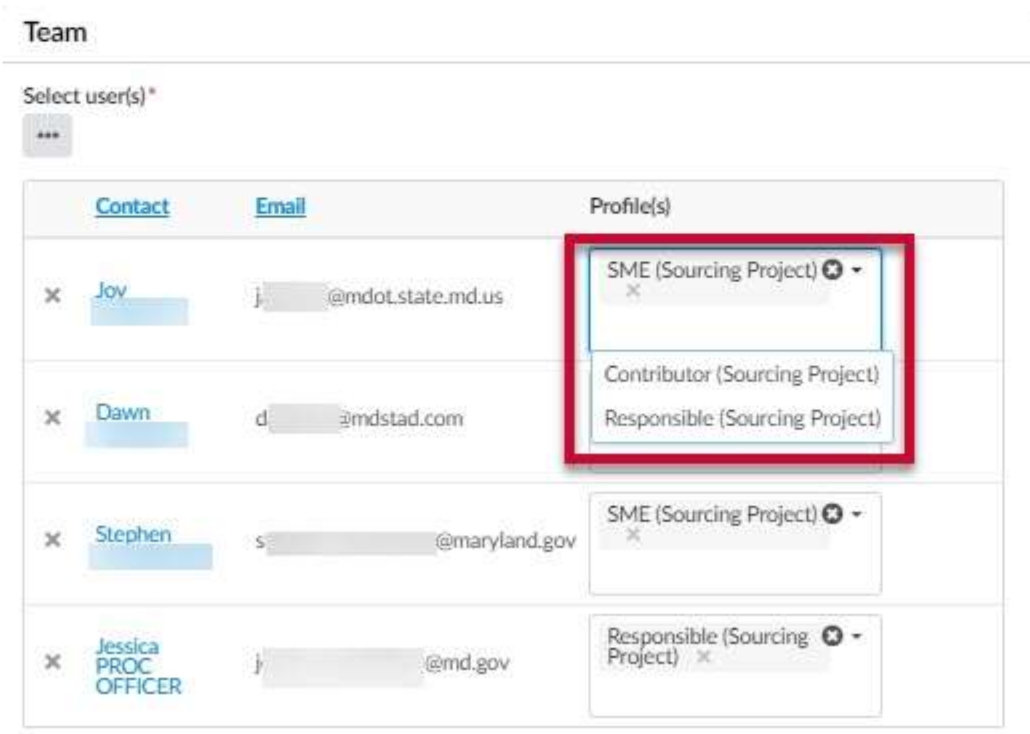


Figure 10: The drop-down menu to assign profile roles for a user in a Team.

Profile roles are defined as:

a. **Responsible (Sourcing Project):**
   i. This role is by default assigned to the Procurement Officer but you can change it.
   ii. This is the Owner of the Sourcing Project.
   iii. They have read, view, and edit access to the project.
   iv. All Vendor communications come to the person with this role.
   v. You can only assign one user the Responsible role per project. However, you must have at least one Responsible role assigned.

b. **Contributor (Sourcing Project):**
   i. They have view access to the project and response activity.
   ii. They can edit information on the Project Information, Team, Schedule, and Documents tabs

c. **SME (Sourcing Project):**
   i. The Subject Matter Expert (SME) and default role assigned when you add a team member.
   ii. This member can be assigned tasks in eMMA.
   iii. They can receive email notifications (Forum messages).
   iv. They can respond to Requirements Gathering questions or Evaluate/Score when assigned the task.

12. (Optional) To remove a user's profile role, click the **X** to the right of the role in the respective field in the Profile(s) column.

NOTE: If you remove the user's only role, it resets to the SME (Sourcing Project) role by default.

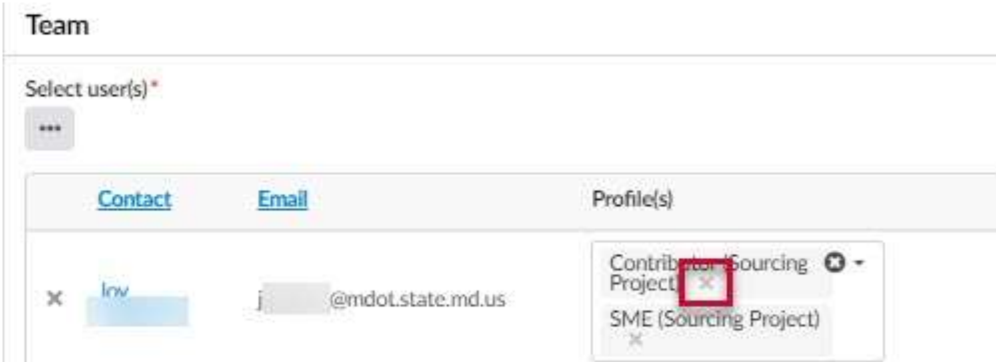


Figure 11: The X to the right of a role to remove it from a user in a team.

13. When you've completed adding your team members and assigning profiles, click the **Save** button at the top of the page.

    NOTE: You must remember to click the Save button. If you don't, you will lose your progress on this tab.

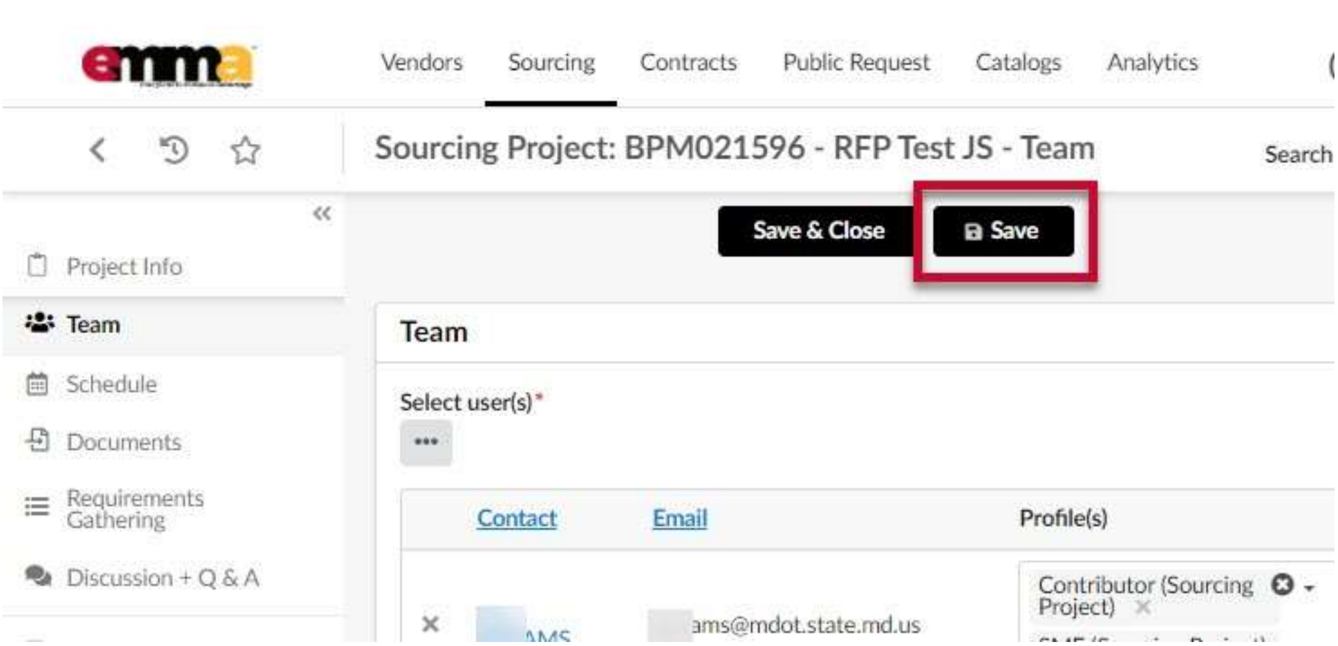


Figure 12: The Save button at the top of the Team page.

Create a Sourcing Project Schedule

This process continues from the last step in the previous process. It shows how to create a schedule for your sourcing project. You can view the pre-populated schedule for the RFP and/or add and modify tasks and schedule items. You can also assign tasks to Team members, if you have added them in the Teams tab.

14. Click the **Schedule** tab in the left-hand side-panel to display the Schedule page. For Requests for Proposals (RFPs) Double and Triple Envelope, you will need to create your own schedule tasks due to the complexity of RFP development and issuance.

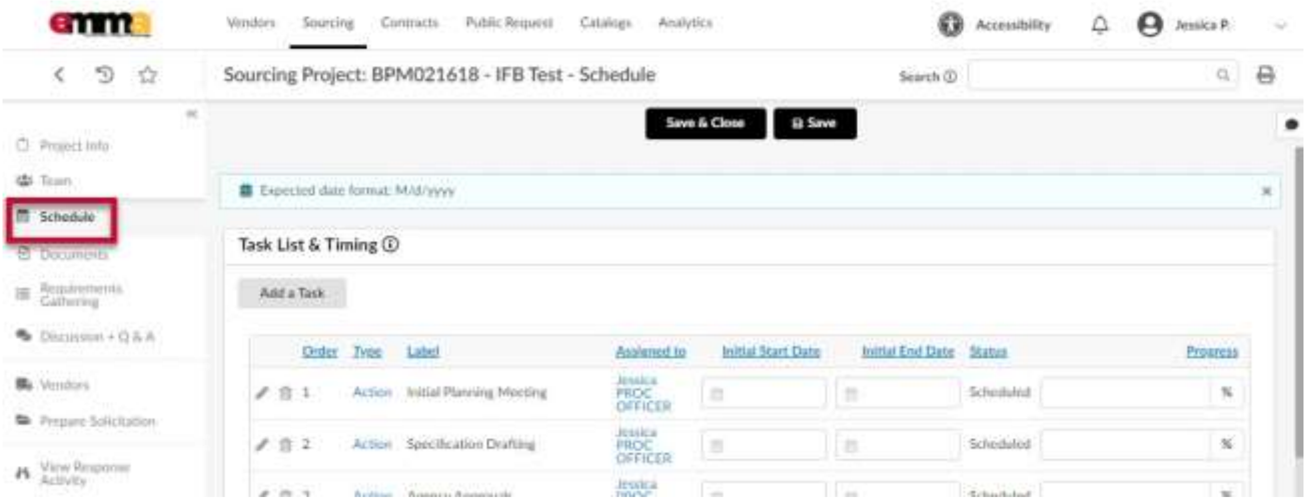


Figure 13: The Schedule tab in eMMA.

15. Steps 16-21 include instructions to create a new task for your schedule. If you do not need to do this, skip to Step 22.
16. (Optional) Click the Edit (pencil) icon to the left of a task you want to change.
17. (Optional) Click the Delete (trashcan) icon to the left of a task you want to delete.
18. (Optional) Click the **Add a Task** button at the top of the Schedule page. The Edit Task window opens. You may need to scroll horizontally to see all the sections.

    NOTE: Once you create a new task and save it, the task moves to the end of the list.

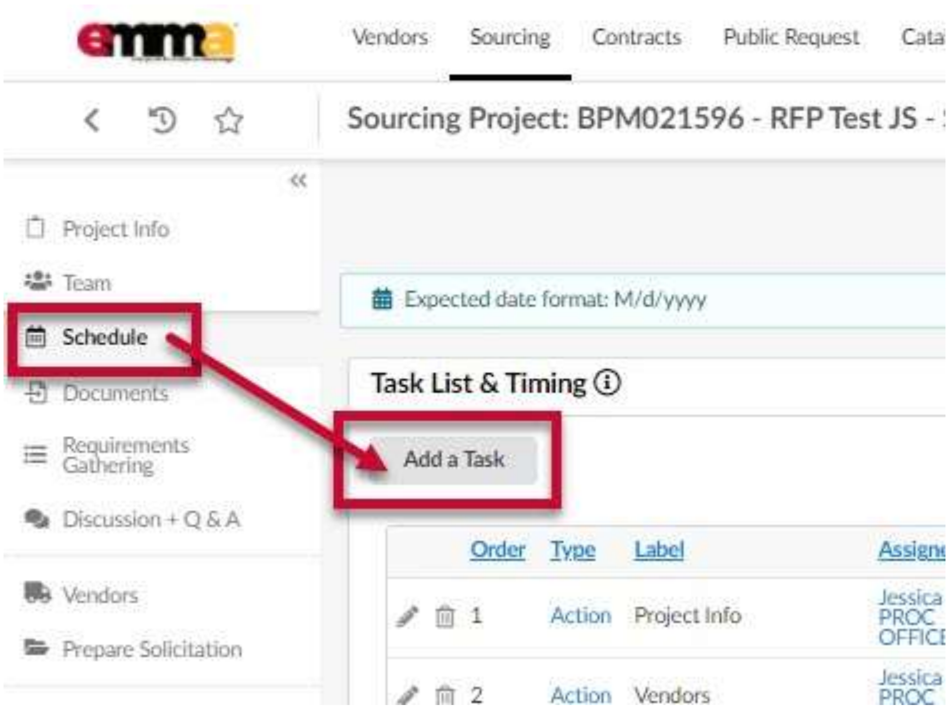


Figure 14: The Schedule tab for a project and the Add a Task button.

19. Enter information in the fields of the **Information** section. A red asterisk (*) indicates a required field.

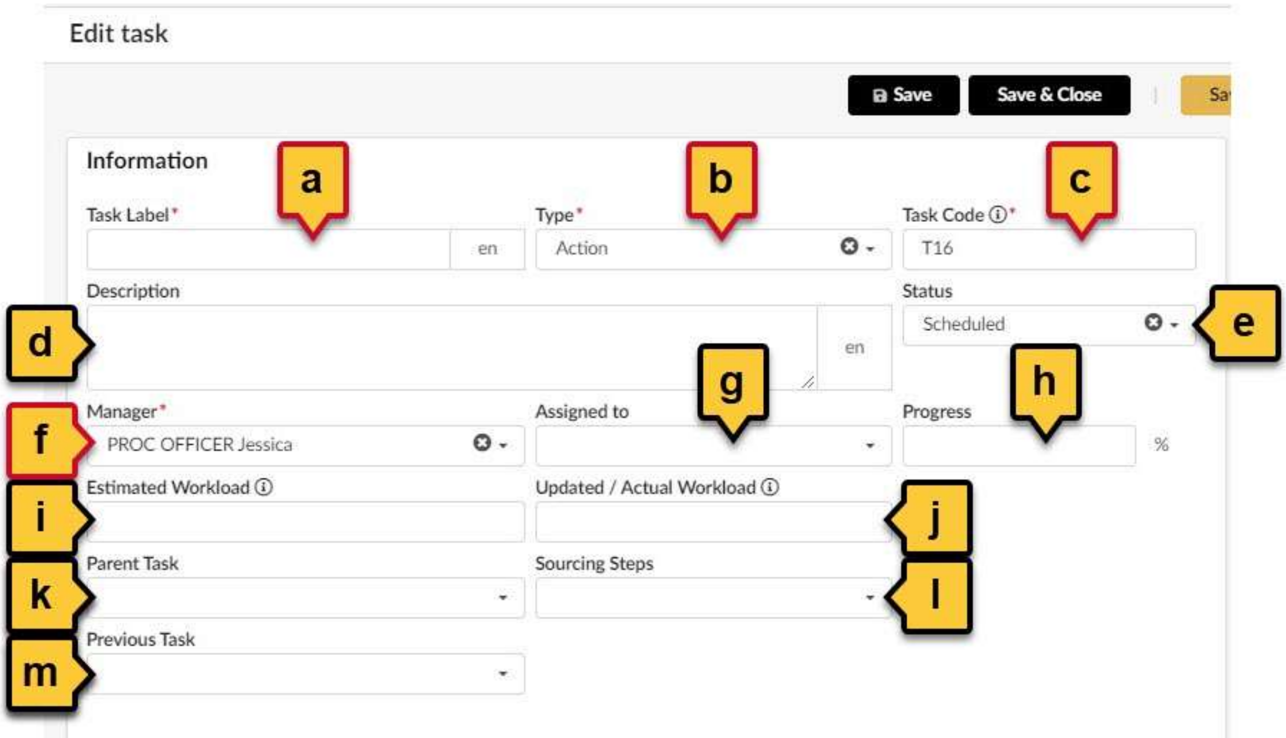


Figure 15: The fields for the Information section.

a. **Task Label (*):** Enter a label for your new task in this field.
b. **Type (*):** Click this field to select a type for this task;
    i. Action (the default type)
    ii. E-Mail Sent
    iii. Event/Workshop
    iv. Mail Sent
    v. Phase
    vi. Phone Contact
    vii. Meeting
c. **Task Code (*):** This field lets you select the order sequence for a single task. Click this field and enter the letter "**T**" and a number for the row in which you want the task to appear. For example, you want the Specification Drafting task to be the 5th task on the list. You would enter "T5" in this field.
d. **Description:** Enter a brief description for the task.
e. **Status:** Click this field to select a status for this task;
    i. Scheduled (the default status)
    ii. Not Started
    iii. In progress
    iv. Complete
    v. Close
f. **Manager (*):** This field auto-populates with your information. Click this field to open a drop-down menu and change it to another member of your team, if necessary.
g. **Assigned to:** Click this field to open a drop-down menu and select a member of your team you want to assign this task to.

h. **Progress:** Enter a numerical value to update the schedule as to how much of this task is complete.
i. **Estimated Workload:** Enter the number of workdays you estimate to complete this task.
j. **Updated/Actual Workload:** Enter the actual number of workdays it took to complete this task.
k. **Parent Task:** Click this field to open a drop-down menu and select a parent task for this task.
l. **Sourcing Steps:** Click this field to open a drop-down menu and select an option from the menu.
    i. Vendors
    ii. Open General Envelope
    iii. Reverse Auction
m. **Previous Task:** Enter the last task to take place before your task.

20. Enter information in the fields for both the **Dates Management** and **Comments** sections. A red asterisk (*) indicates a required field.

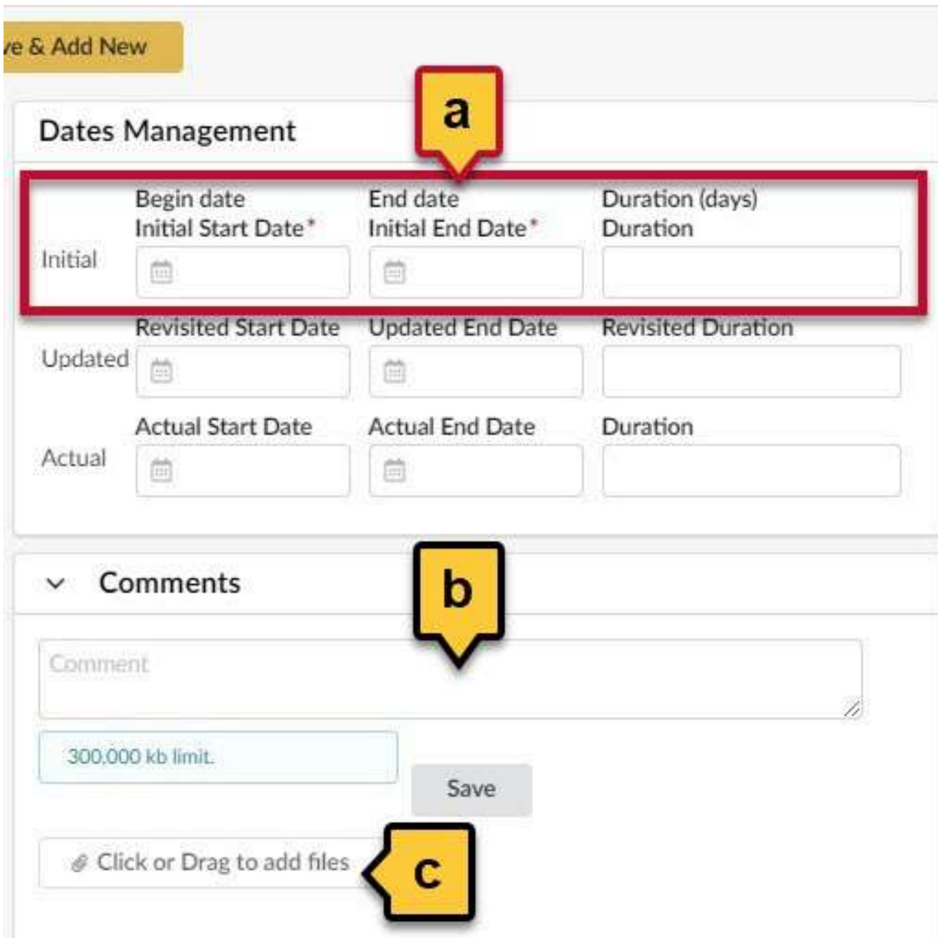


Figure 16: The Initial date fields with the Comment field and the Click or Drag to add files button for a task.

n. **Initial Dates (*):** Click the **Initial Start Date (*)** field and select a date on which to start your task. Click the **Initial End Date (*)** field to select an end date. Enter a **Duration** (optional) period (in days) if desired.
o. **Comment:** Enter comments in this field for your task.
p. **Click or Drag to add files:** Click the **Click or Drag to add files** button to add a file from your device or drag a file to this button to add it.

NOTE: Added uploaded files cannot exceed 300,000 KB.

NOTE: You cannot edit documents directly in eMMA, but you can upload new files.

21. Click the **Save & Add New** button at the top of the Edit task window and repeat Steps 16-21 until your schedule is complete. Click the **Save & Close** button when you are finished adding tasks.

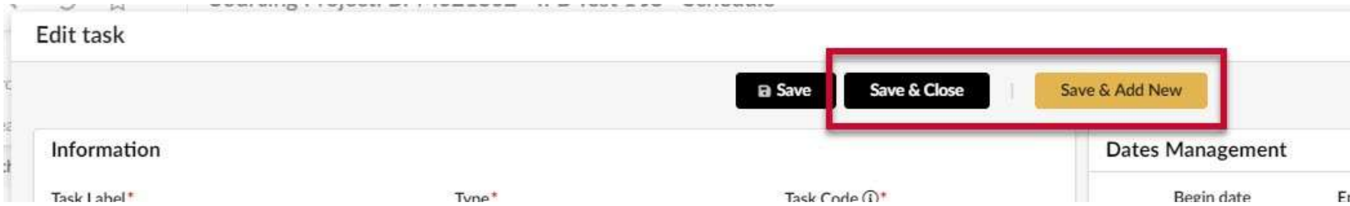


Figure 17: The Save & Close and Save & Add New buttons in the Edit task window.

22. Click the **Save** button at the top of the Schedule page to save your schedule. Scroll to the bottom of the Schedule page to view the Gantt chart of your schedule. Hover your cursor over one of the blocks to see a detailed pop-up about that block.

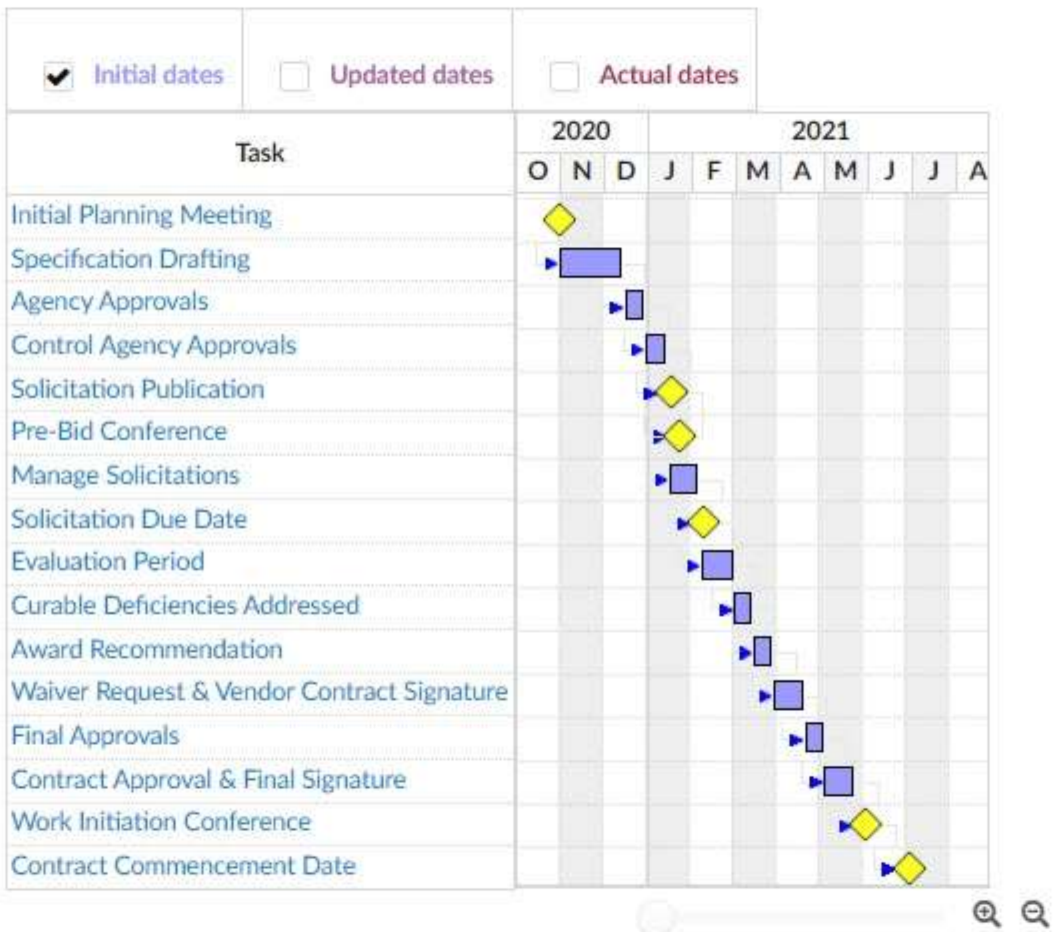


Figure 18: The Gantt chart for a completed schedule on the Schedule page.

Add Documents

This process continues from the last step in the previous process. It shows how to add documents to your sourcing project.

NOTE: You can only add documents to sourcing projects of which you are the owner, and only your sourcing project

Team members can view them. Vendors can view your documents if you grant them permission. Documents stored here can be copied to the solicitation and shared with Vendors later when you publish the solicitation, if desired.

NOTE: You cannot edit documents directly in eMMA, but you can upload new files.

23. Click the **Documents** tab in the left-hand side-panel to display the Documents page. Existing documents, if any, display in the **Sourcing Project Documents** pane.
24. Click the **Create Document** button in the **Sourcing Project Documents** pane. The Sourcing Project Documents pop-up window displays.

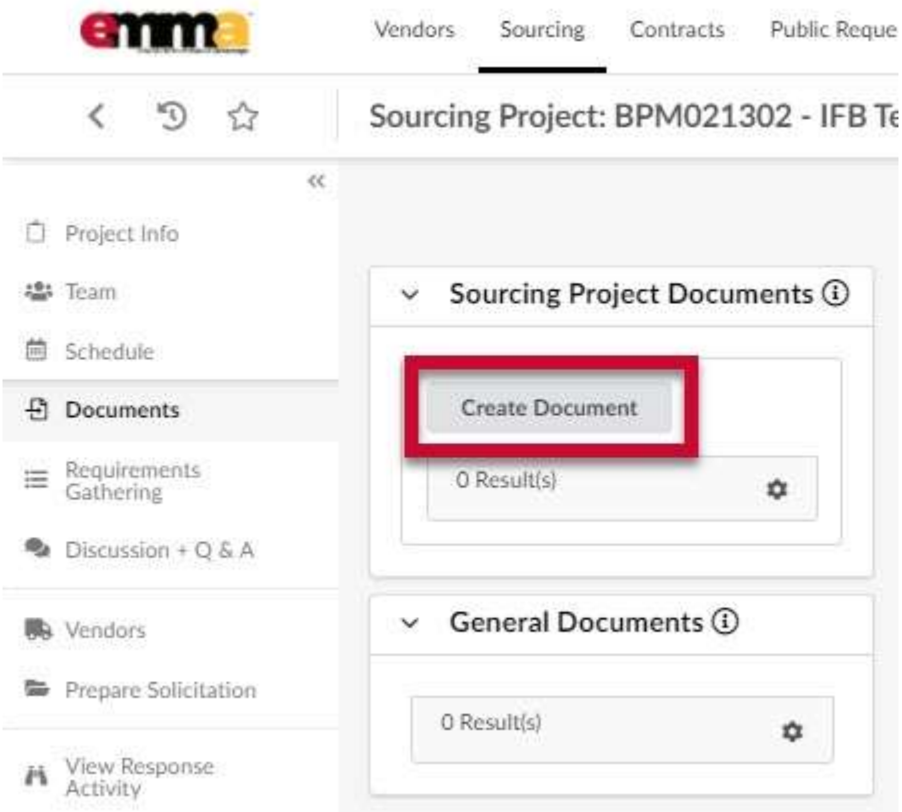


Figure 19: The Create Document button in the Sourcing Project Documents pane of the Documents tab.

25. Enter information in the form fields. A red asterisk (*) indicates a required field.

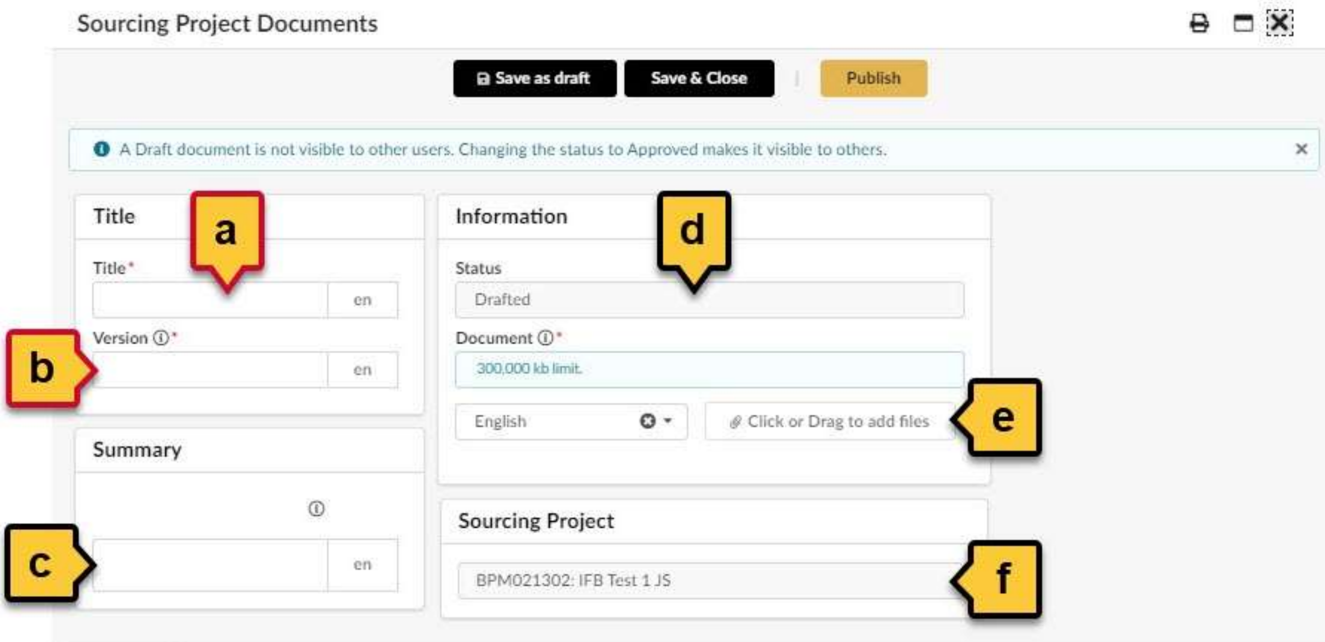


Figure 20: The Sourcing Project Documents window.

a. **Title (*):** Enter a title for the document.
b. **Version (*):** Enter a numeric value for the version of the document. The application will suggest the next version increment for each new revision.
c. **Summary:** (Optional) Enter a brief summary of the document. Once you click this field, text editing options appear above it.
d. **Status:** This field indicates the current status of the document. You don't need to do anything here.
e. **Click or Drag to add files (*):** Click this button to choose a file from your device or drag and drop the file on this spot to add it. The added file displays below this button. Click the **X** to the left of the document to remove it.

   NOTE: The uploaded document or file size must not exceed 300,000 KB.

   NOTE: You cannot edit documents directly in eMMA, but you can upload new files.

f. **Sourcing Project:** This field indicates the sourcing project associated with this document. No further action is required here.

26. You have four options to move forward:

Figure 21: The Save and publish options for a document in Draft state.

   a. **Save as draft:** Click this button to save the document as a draft. The Sourcing Project Documents window now shows the document listed (in the Information pane), tracking info of the document (at the bottom), and a **Delete** button (at the top) to remove the draft.

      NOTE: Other users cannot see documents in Draft status. Changing the Status to Approved makes it visible to others (see Step 26c).

   b. **Save & Close:** Click this button to save the document as it is shown and close the Sourcing Project Documents window.
   c. **Publish:** Click this button to publish or "Approve" the document and make it visible to others. The Sourcing Project Documents window now shows the document status as "Approved," a **New Draft** button to create a new draft of the document (at the top), a **Delete** button to remove the document (at the top), and tracking information (at the bottom).
   d. **Delete:** Click this button to cancel/delete the document from eMMA.
27. Unless you chose option b (Save & Close) or d (Delete) in the previous step, click the **Save & Close** button at the top of the window.
28. Click the **Save** button at the top of the Documents page. Your document is listed on the Documents page along with version info, who created the document, the creation date, and the date last modified. Remember to click the **Save** button after making any updates or changes to your document.

    Click the Edit (pencil) icon to the left of the document Title to edit the document (upload a new version).

    NOTE: Once you add a document, you cannot edit a document directly in eMMA, but you can upload new versions.

    Click the Delete (trashcan) icon to the left of the document Title to delete the document.

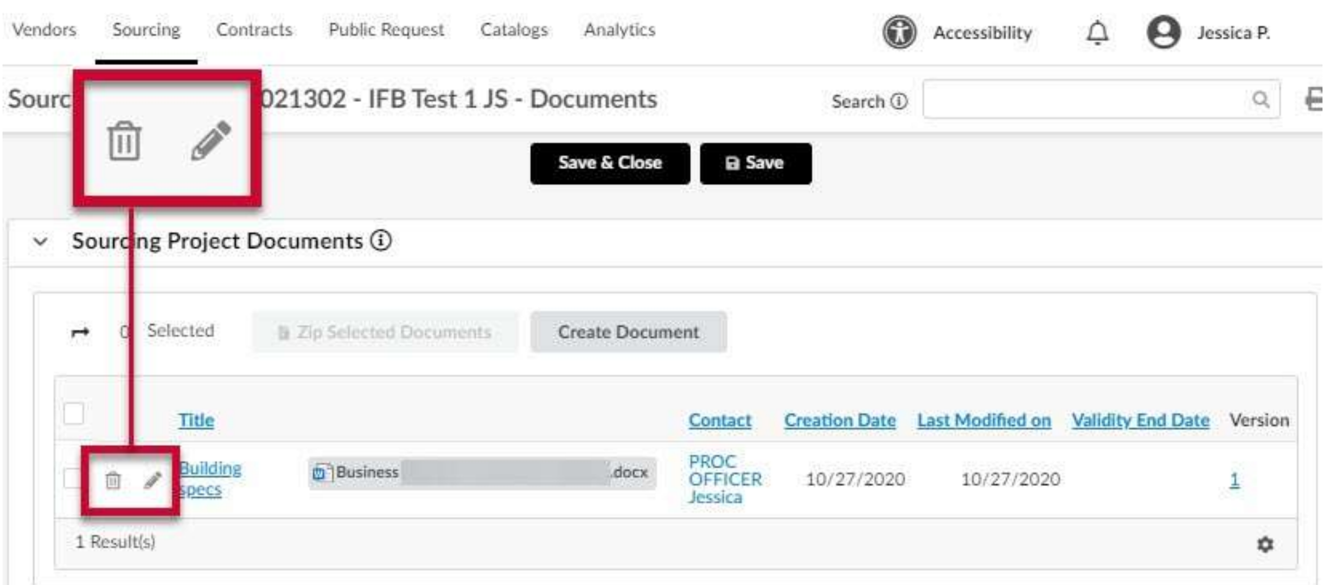


Figure 22: The added document for a sourcing project with the Delete and Edit icons for that document.

Select Vendors

This process continues from the last step in the previous process. It shows how to add vendors to your RFP sourcing project based on identified criteria and requirements.

NOTE: For solicitations requiring 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.

29. Click the **Vendors** tab in the left-hand side-panel.

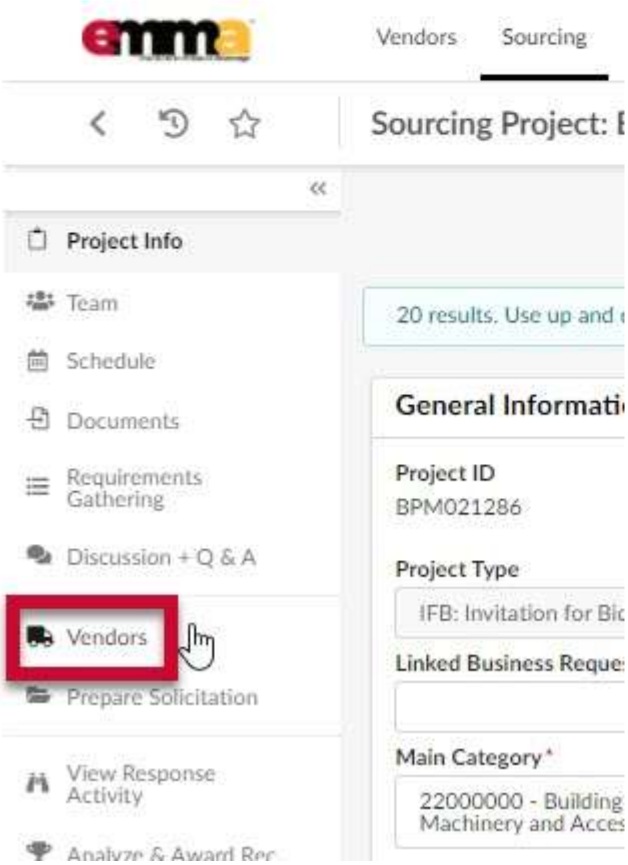


Figure 23: The Vendors tab in the left-hand side-panel.

30. Click the ellipsis (three dots) button in the **Consulted Vendors** section. The **Browse Vendors** pop-up window opens and displays a list of Vendors based on the sourcing project's main commodity.

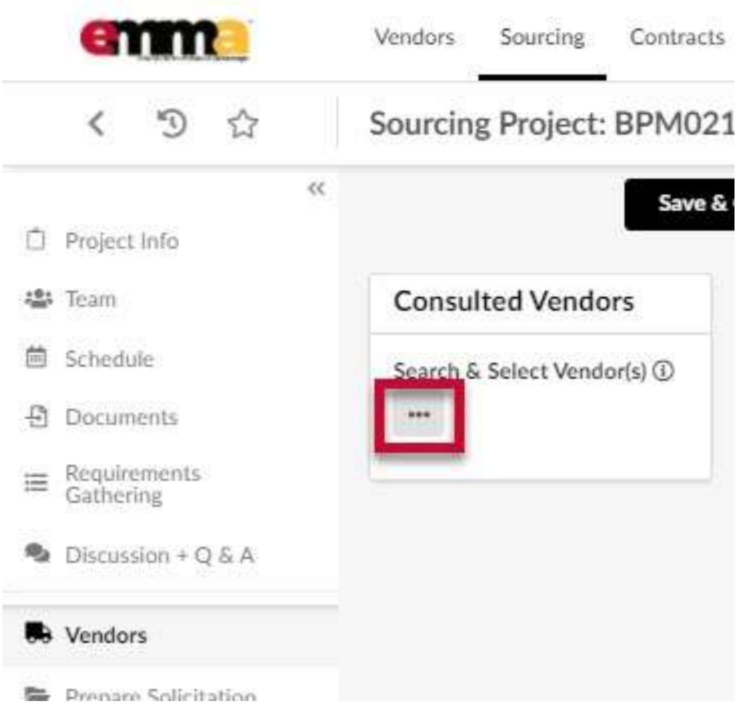


Figure 24: The ellipsis (three dots) icon in the Consulted Vendors section.

31. (Optional) If you have a specific Vendor in mind that may not be on the commodity list but can provide the required service, enter their name in the **Keywords** field, delete the Commodity Code from the **Commodity** field and click the **Search** button.
    a. Select the checkbox to the left of the Vendor and close the Browse Vendors window. That Vendor displays on the Vendors page.
    b. Click the ellipsis (three dots) icon to continue to Step 32.
32. Click the **Commodity** field to open a drop-down list and click the **See All** option at the bottom. This list lets you add more commodities that are relevant to your sourcing project to get a broader selection of vendors. You can add as many commodities as you want in this field.

    NOTE: It is a best practice to select as many commodities as possible to obtain a thorough vendor list.

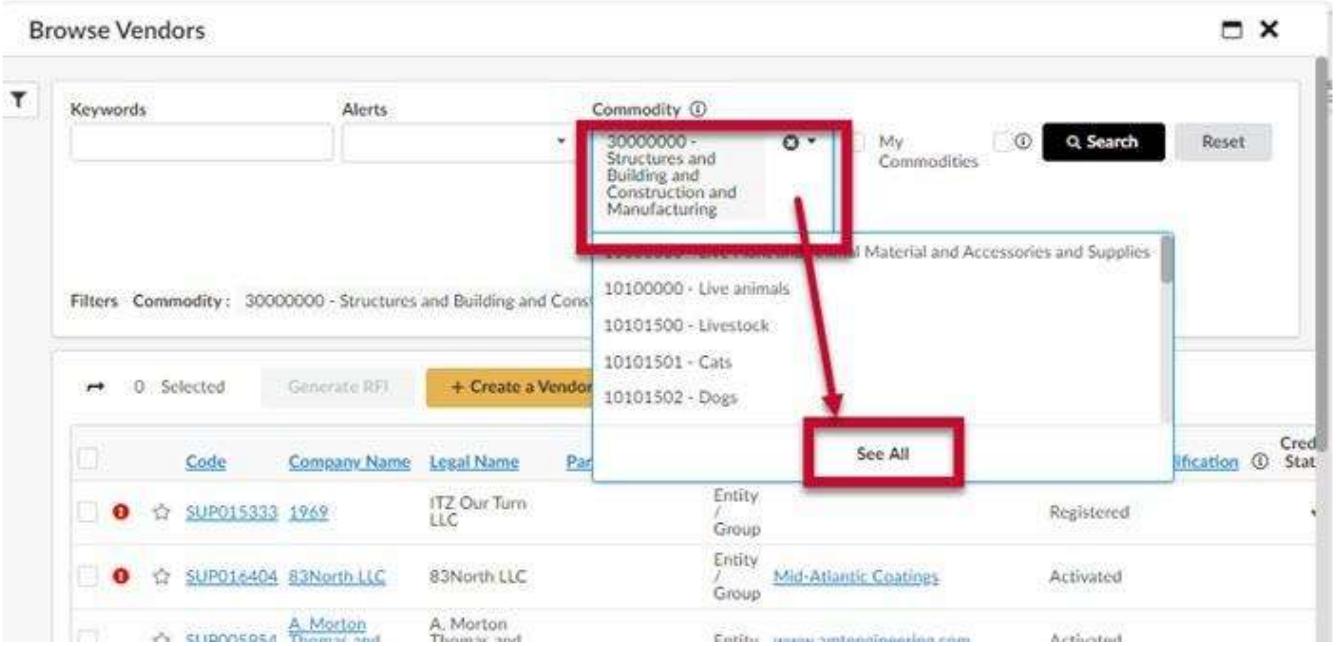


Figure 25: The Commodity field and the See All option in the drop-down menu.

33. The Select Commodities window opens with a full list of commodities. Use the plus ⊞ and minus ⊟ icons to the left of the commodity groups to expand and collapse them. Select the checkboxes to the left of the commodity(ies) you want to add and close the window.

    NOTE: Selecting a commodity level next to a plus icon or minus icon only provides vendors that are registered for that exact commodity, and NOT any sub commodities below that level.

    The selected commodities display in the Filters section of the window, below the search fields and above the list of vendors.

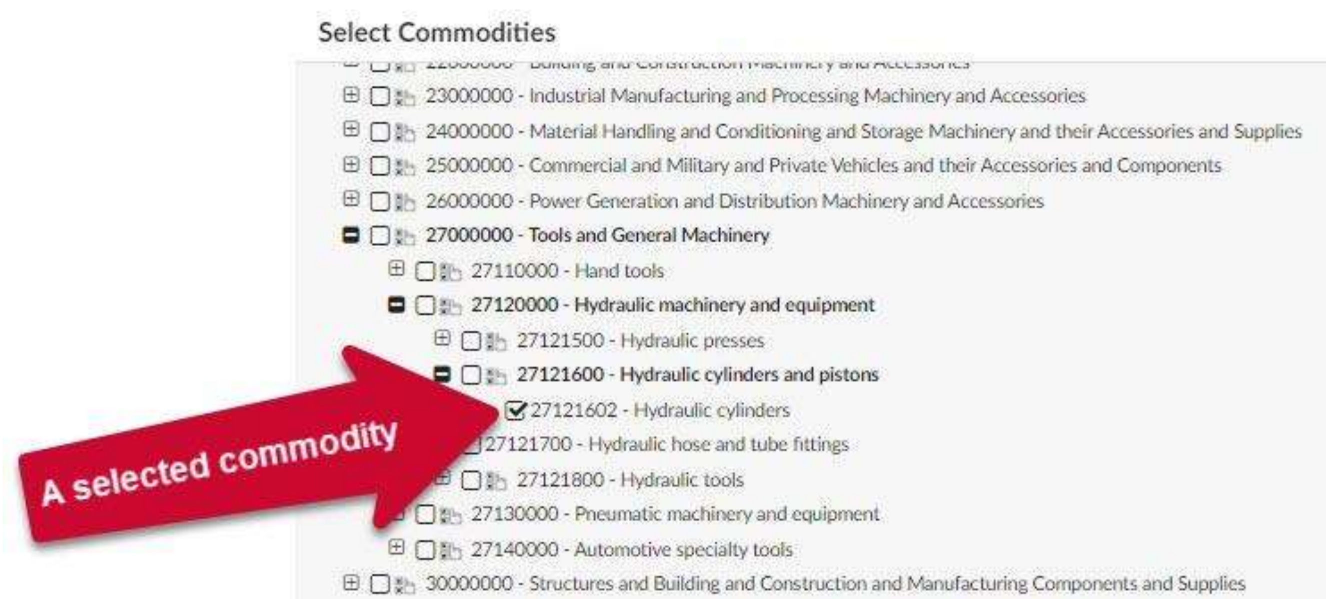


Figure 26: The Select Commodities window a selected commodity.

34. Click the **Search** button at the top of the Browse Vendors window. A list of Vendors displays relevant to the commodities you selected.

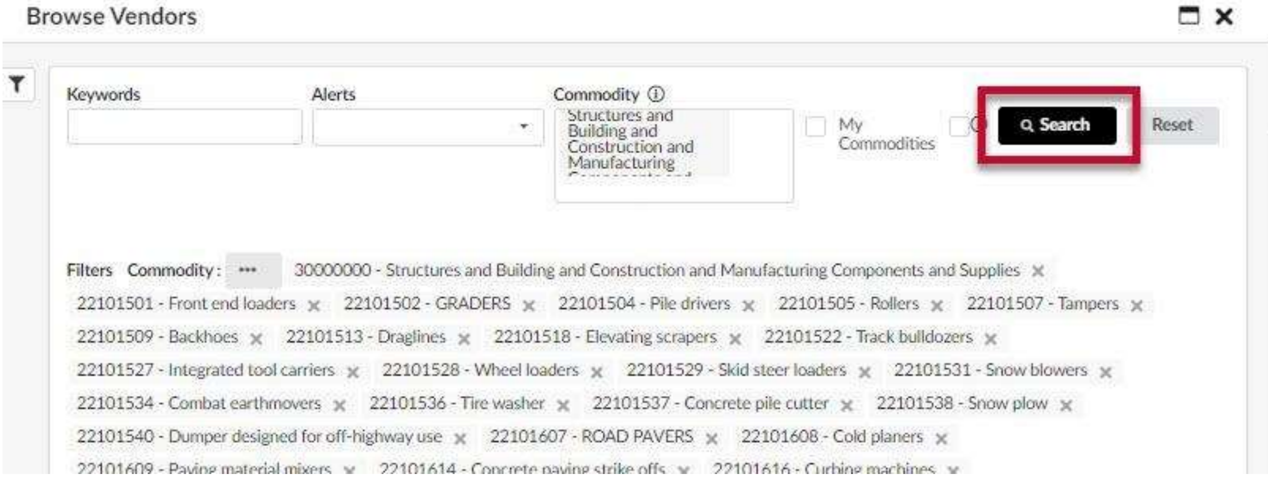


Figure 27: The Search button in the Browse Vendors window after adding commodities.

35. Select the topmost checkbox to the left of the column headers to select all vendors on that page in the commodity.

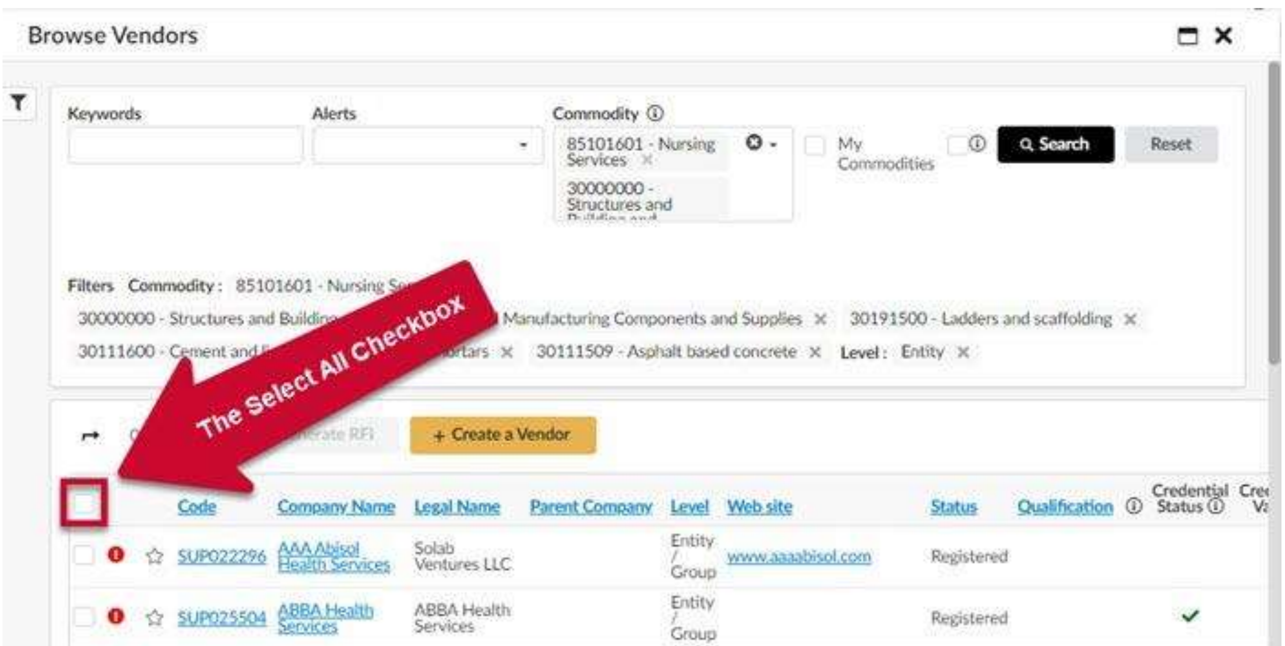


Figure 28: The topmost checkbox to the left of the column headers in the Browse Vendors window.

36. Scroll down to the bottom of the Vendors list and click the next page in succession. A list of unselected Vendors displays.

Figure 29: The page numbers for a list of Vendors in the Browse Vendors window.

37. Repeat Steps 35 and 36 until the Vendors on all pages are selected.
38. Close the **Browse Vendors** window. The Vendors are listed in the Consulted Vendors section.
39. Click the **Save** button at the top of the page.

IMPORTANT: You must make sure you click the **Save** button or you will lose your progress to this point.

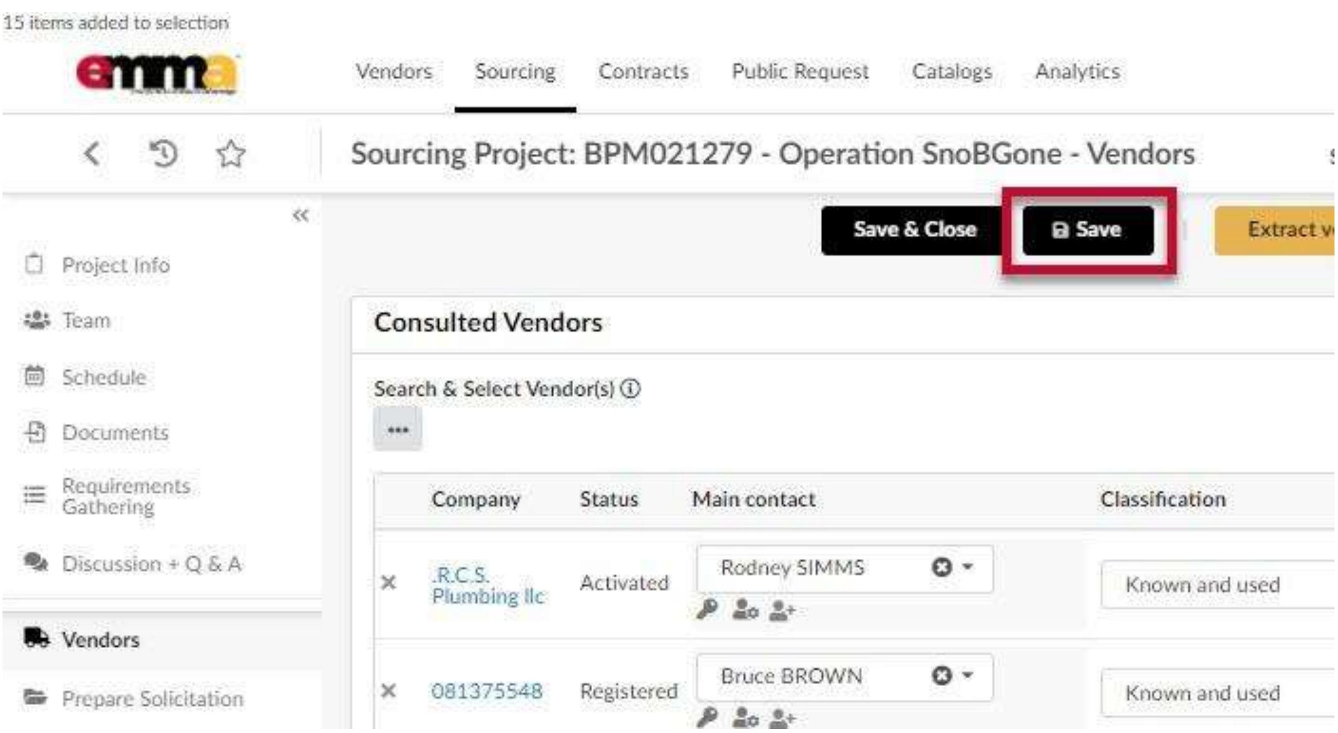


Figure 30: The Save button at the top of the page with added Vendors.

Prepare Solicitation – Setup

This process continues from the last step in the previous process. It shows how to set up your solicitation for your RFP.

40. Click the **Prepare Solicitation** tab on the left-hand side-panel. The **Setup** subtab displays a form.

41. Enter information in the fields on the left side of the form. A red asterisk (*) indicates a required field.

NOTE: Depending on your selections in the fields, more fields may display.

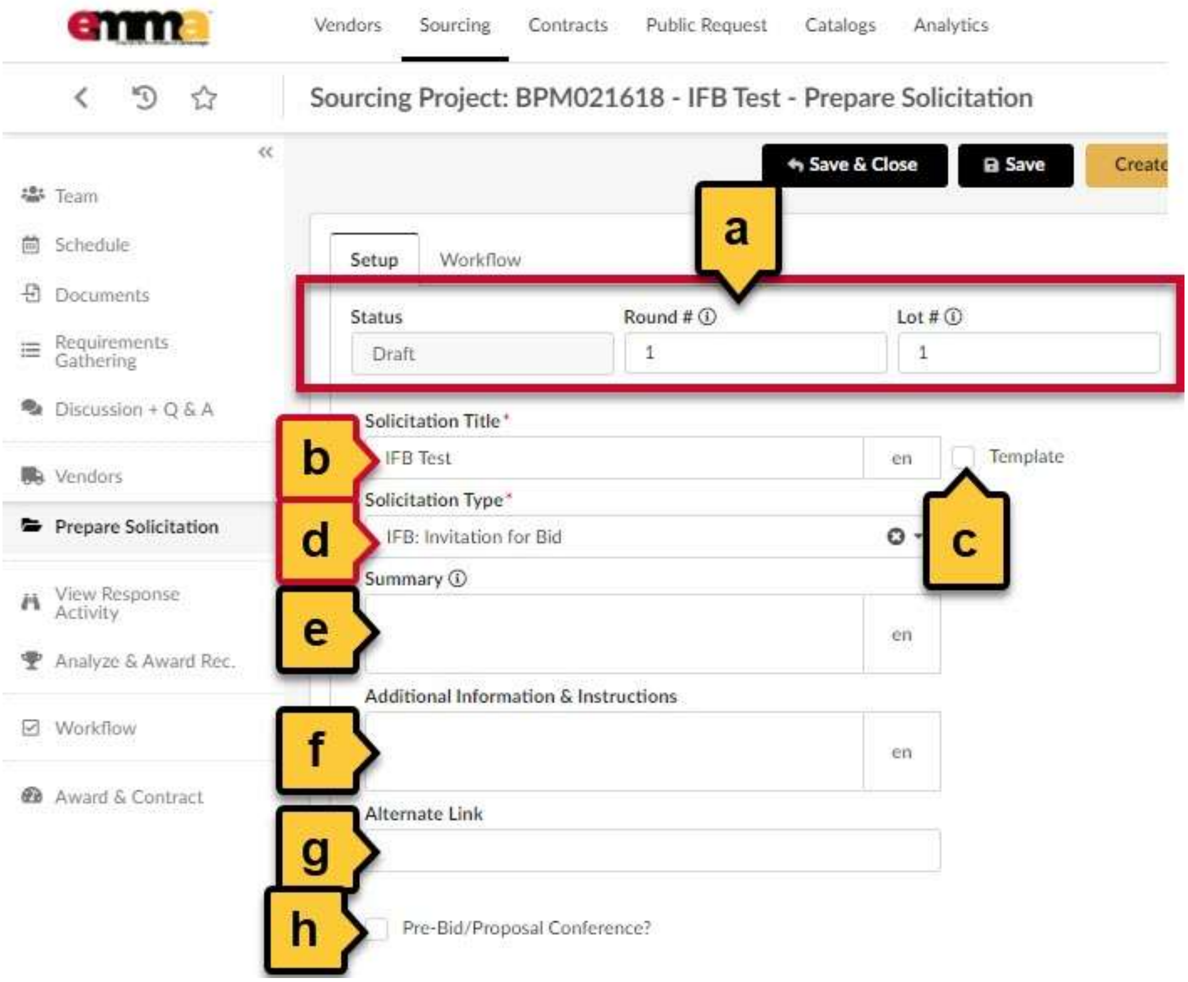


Figure 31: The Setup form and fields on the Prepare Solicitation tab.

a. The **Status**, **Round #**, and **Lot #** fields are system-generated. You do not need to do anything in these fields.
b. **Solicitation Title (*):** The title of your solicitation auto-populates here.
c. **Template** (checkbox)**:** Select this checkbox if you want to make a template from this solicitation to use in the future.
d. **Solicitation Type (*):** Click this field and select the appropriate type of solicitation from the drop-down menu that opens; **RFP: Double Envelope Proposal (LP)**, or **RFP: Triple Envelope Proposal (LP)**.
e. **Summary:** Enter a brief introduction and summary for your solicitation.
f. **Additional Information & Instructions:** Enter any additional information and instructions in this field.
g. **Alternate Link:** Enter the link to the bid board on which this solicitation is posted, if applicable; i.e. BidExpress.

h. **Pre-Bid/Proposal Conference?** (checkbox)**:** Click this checkbox if you intend to have a Pre-Bid/Proposal conference for this solicitation. If you selected this checkbox, new mandatory fields display.

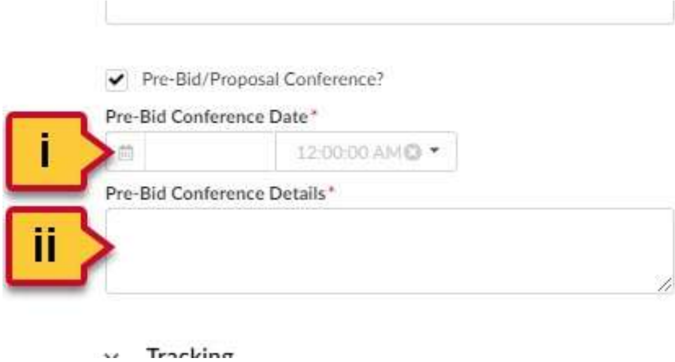


Figure 32: The Pre-Bid Conference fields that display when the checkbox is selected.

   i. **Pre-Bid Conference Date (*):** Click this field and select the date of your pre-bid conference.

   ii. **Pre-Bid Conference Details (*):** Enter the details of your pre-bid conference, like when, where, how to register, what Vendors need, etc.

42. Enter information in the fields for the **Response Dates** and **Public Visibility** sections on the right side of the form. A red asterisk (*) indicates a required field.

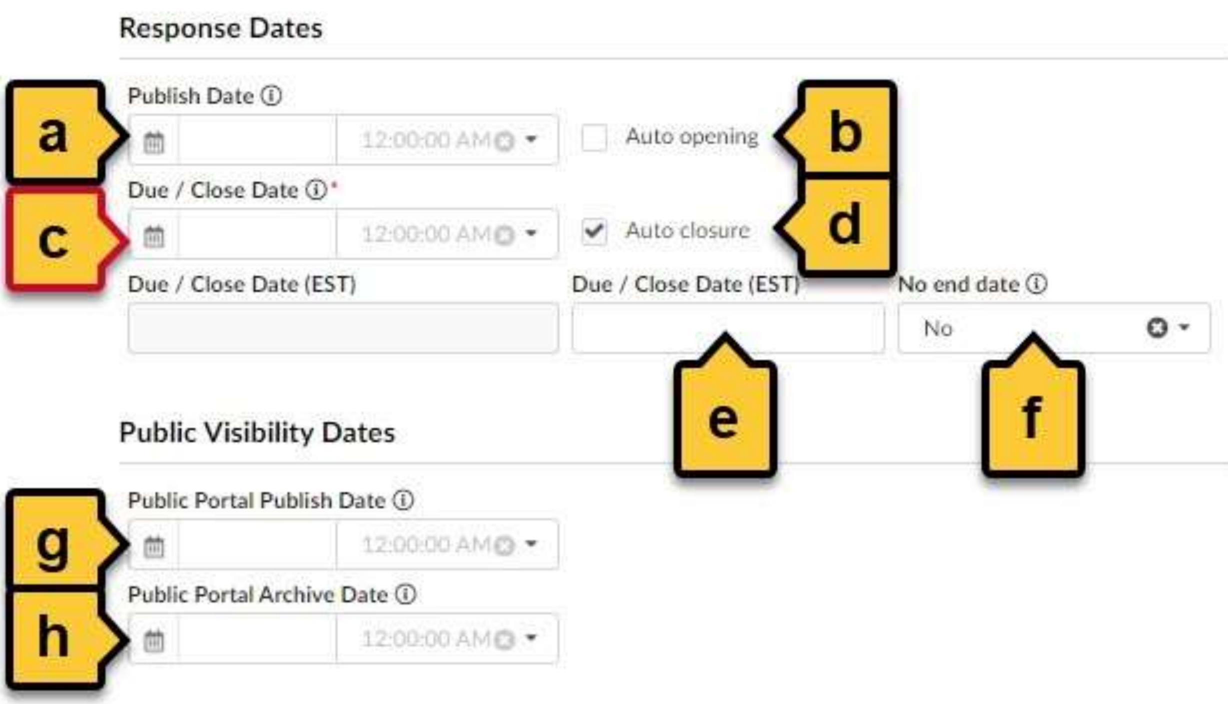


Figure 33: The Response Dates and Public Visibility Dates sections and respective fields.

a. **Publish Date: IMPORTANT!!** If you want vendors to start submitting a response immediately, leave this field **BLANK**. Select a date only if you want vendors to start submitting responses at a future date.
   i. If you select a date for this field, make sure you check the **Auto opening** checkbox (b).

b. **Auto opening** (checkbox): Select this checkbox ONLY if you selected a future date for your publish date. If selected, your bid period will publish automatically on the date you chose.

c. **Due/Close Date (*):** Click this field and select the date that vendors can no longer submit responses.
d. **Auto closure** (checkbox)**:** The option to close the solicitation on the due date is selected by default and cannot be changed. You do not need to do anything here.
e. **Due/Close Date (EST):** This field populates after you click Save. You do not need to do anything here.
f. **No end date:** Do you prefer to have an open end date? Click this field and select **Yes** from the drop-down menu. **No** is the default selection.
g. **Public Portal Publish Date:** Click this field and select the date that you want to publish your solicitation in the public portal. Leave this field blank if you want to publish immediately.
h. **Public Portal Archive Date:** Click this field and select the date that you want to unpublish your solicitation in the public portal.

43. Click the arrow to the left of the **Advanced options** section below the Response Dates and Public Visibility.

    NOTE: Some checkboxes are selected by default and some cannot be changed because of the nature of your project type.

44. Review and make selections necessary to your project. Options include: **Solicitation Visible to Public**, **Sealed Responses**, **Vendors must Acknowledge & Identify intent to Respond**, and **Bid Holders List Visible to Public**.

    If the option for **Bid Holders List Visible to Public** is not selected, then click the checkbox to the left of it to select it.

Figure 34: The Advanced options for setting up an RFP sourcing project.

45. Click the **Save** button at the top of the Prepare Solicitation page.

Figure 35: The Save button at the top of the Prepare Solicitation page.

Prepare Solicitation – Pricing

This process continues from the last step in the previous process. It shows how to set pricing for your RFP solicitation.

46. Click the **Pricing** subtab in the **Prepare Solicitation** page.

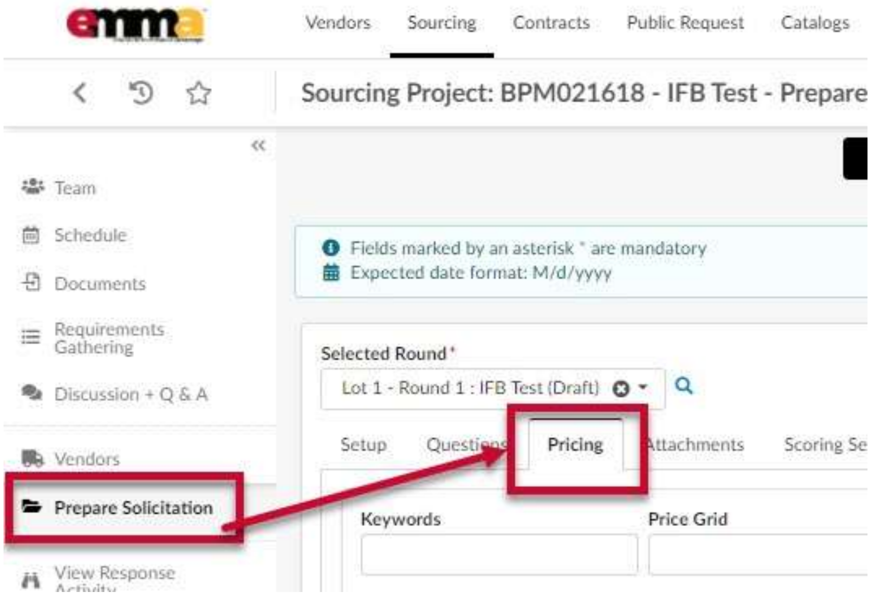


Figure 36: The Pricing subtab on the Prepare Solicitation page.

47. Enter information in the form fields to create a line item within the pricing grid for each item for bid. A red asterisk (*) indicates a required field. A **(V)** to the right of the heading indicates values that are visible by vendors and the public, if you opted to make this a public solicitation.

Figure 37: The line item form and fields to price an item.

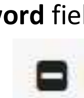
a. **Item Code (V) (*):** This item code auto-populates. You do not need to do anything here.

b. **Item Type (V) (*):** Click this field to open the drop-down menu. Select one of the four options;

   i. Required Item
   ii. Price Adjustment
   iii. Optional Item
   iv. Additional Fees

c. **Item Label (V) (*):** Enter in the name and brand of the item in this field.

d. **Detailed Description:** Enter a detailed description of your item in this field.

e. **Commodity:** Click this field and click the **See All** option at the bottom of the menu. The Select Commodities window opens. Enter a term for your commodity in the **Keyword** field and click the **Search** button for relevant results. You may need to click the plus  and minus  icons to expand and collapse commodity tiers. Click the checkbox to the left of the commodity that applies to your item and close the Select Commodities window.

f. **Quantity (*):** Enter the quantity needed for your item in this field.

g. **UoM (*):** Click this field to open the drop-down menu and select a unit of measure for your item. (Optional) Click the **See All** option at the bottom of the menu to select from a more detailed list.

h. **Reference Price:** Enter the price of the item for one unit on the market. You do not need to enter a price if you want the vendor to list their own price.

i. **Target Price:** Enter the price of the item that you would like to pay for one unit.

48. Click the **Save** button at the top of the Prepare Solicitation page. A new line is created in the pricing subtab and displays at the top of the list. Your first item is entered and displays below the empty line item fields in the Pricing subtab.

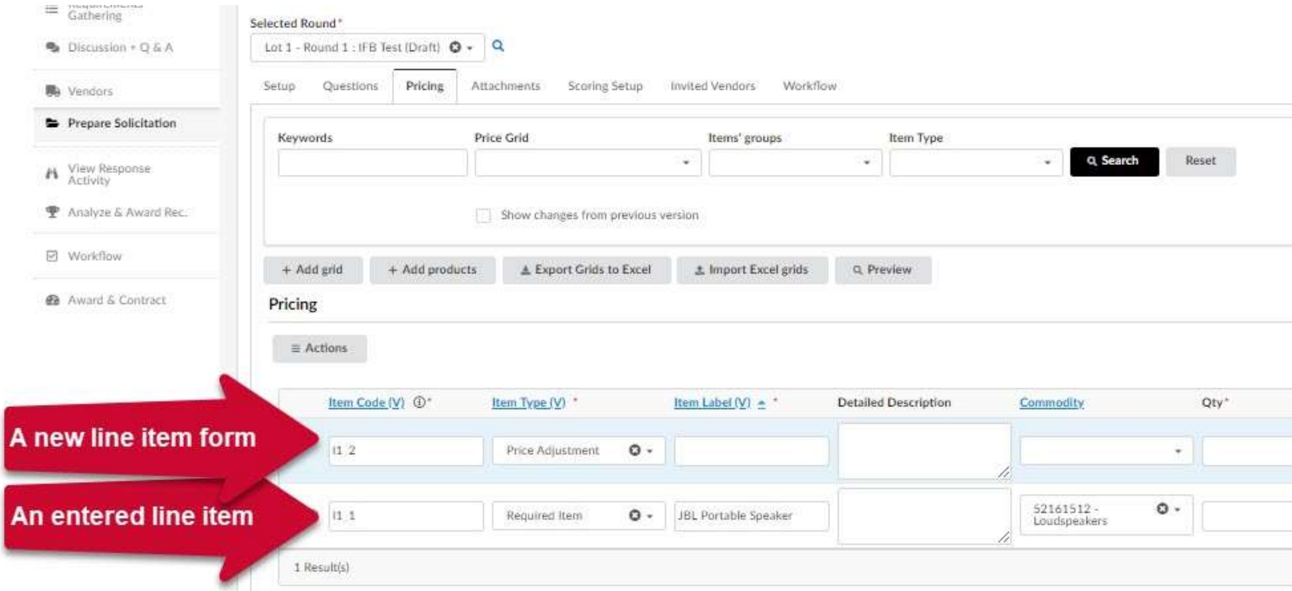


Figure 38: A new line item form and a completed line item in the Pricing subtab.

49. (Optional) Repeat Steps 47 and 48 to add new items, if necessary.

Prepare Solicitation – Attachments

This process continues from the last step in the previous process. It shows how to attach documents to your RFP solicitation.

50. Click the **Attachments** subtab in the **Prepare Solicitations** page.

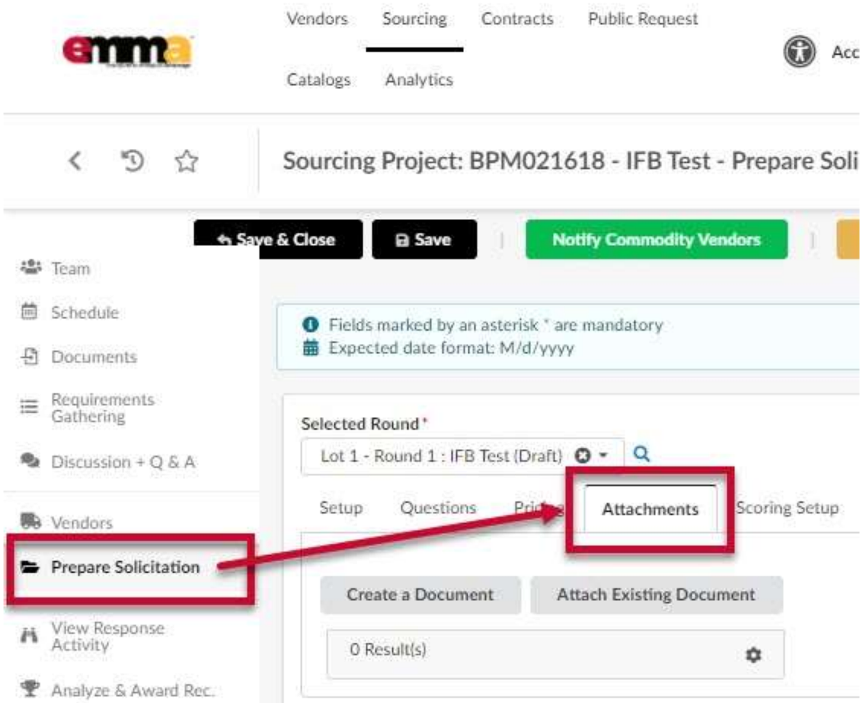


Figure 39: The Attachments subtab on the Prepare Solicitation page.

51. (Optional) Click the **Create a Document** button to add a new document to your solicitation.

NOTE: Uploaded documents cannot exceed 300,000 KB.

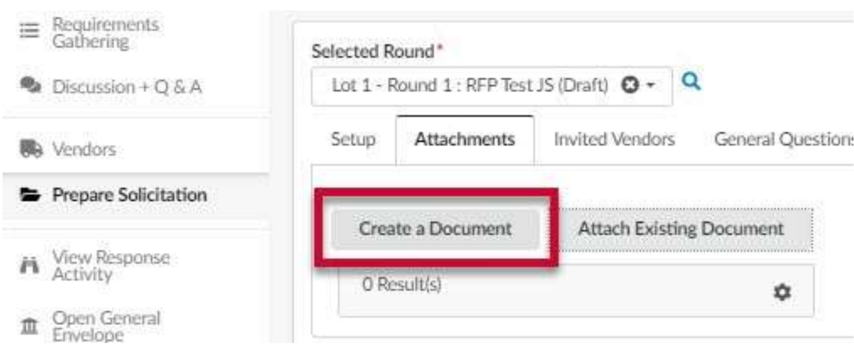


Figure 40: The Create a Document button in the Attachment subtab.

a. In the Content Editor window that opens, click the link that best describes your document.

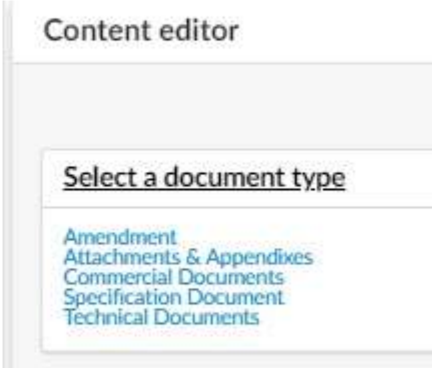


Figure 41: The document links in the Content Editor window.

b. Enter information in the document window fields and add the document (**Click or Drag to add files** button).

NOTE: Make sure you change the document status to **Approved** so that both team members and vendors can view it.

Figure 42: The Approved status in the Status drop-down menu for a document.

c. Click the **Save & Close** button at the top of the window. Your added document displays below the Attachment subtab.

52. (Optional) Click the **Attach Existing Document** button to add a document that exists in the Documents tab of your project. The Sourcing Project/Documents window opens and lists any documents you added to the Documents tab.

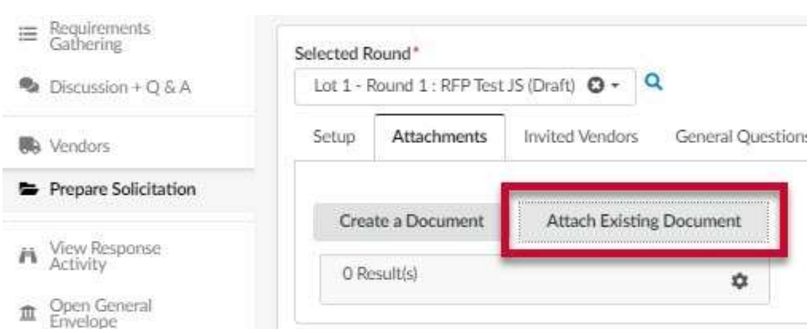


Figure 43: The Attach Existing Document button in the Attachments subtab.

a. Select one or more checkbox(es) to the left of the document(s) you want to attach and click the **Save & Close** button at the top of the Sourcing Project/Documents window. The selected document(s) display in a list on the Attachments subtab.

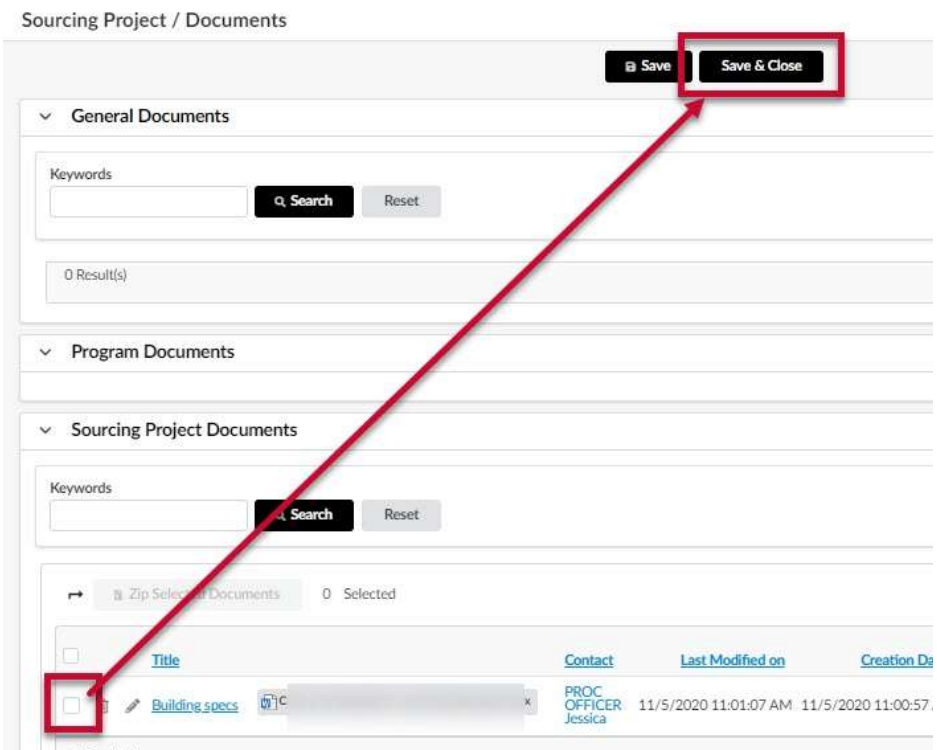


Figure 44: The checkbox for an existing document and the Save & Close button in the Sourcing Project/Documents window.

NOTE: You may need to go back and approve documents. Documents in **Draft** status will not be visible to vendors. The **Type** column for your document will be orange and read "Technical Documents (Drafted)".

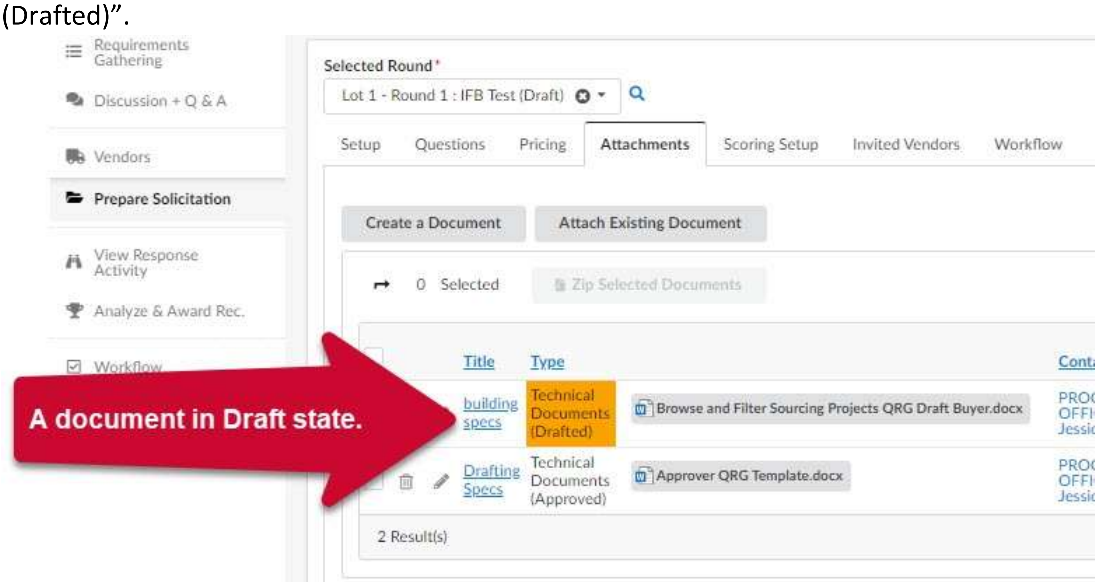


Figure 45: A document in Draft state and a document in Approved state.

53. Click the **Save** button at the top of the Prepare Solicitation page.

Notify Vendors and Publish Solicitation

This process continues from the last step in the previous process. It shows how to notify vendors of your RFP solicitation.

54. Click the **Invited Vendors** sub-tab and scroll to the bottom of the selected Invited Vendors list.

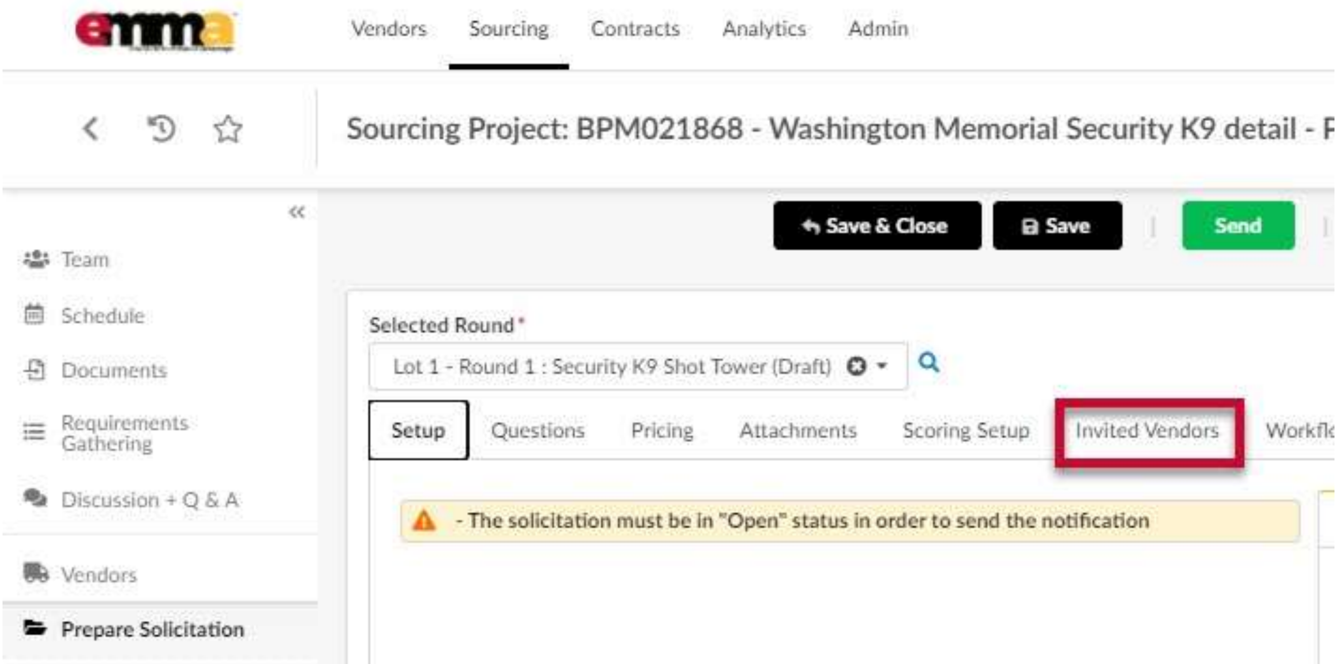


Figure 46: The Invited Vendors sub-tab on the Prepare Solicitation page.

55. Click the next page number of Vendors.

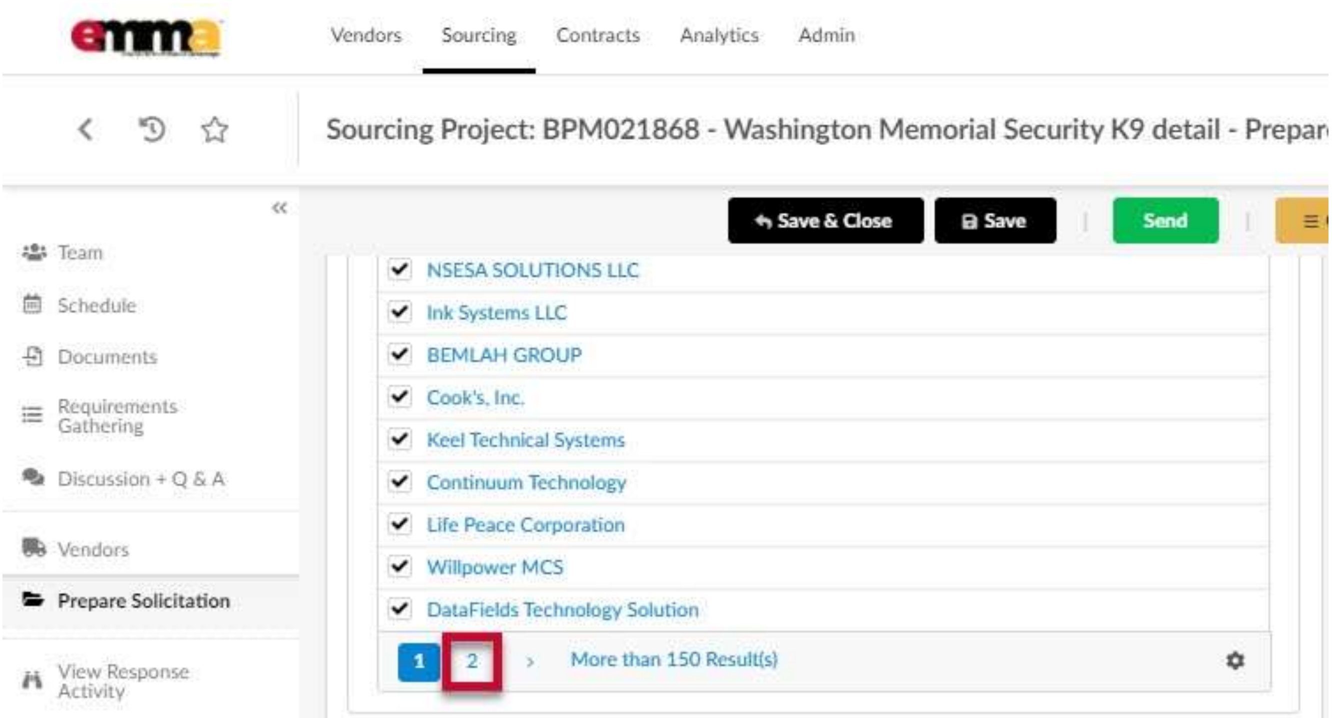


Figure 47: The next page number of Vendors for a solicitation in the Invited Vendors sub-tab.

56. Scroll to the top and click the checkbox to the left of the Invited Vendors column header, if not already selected.

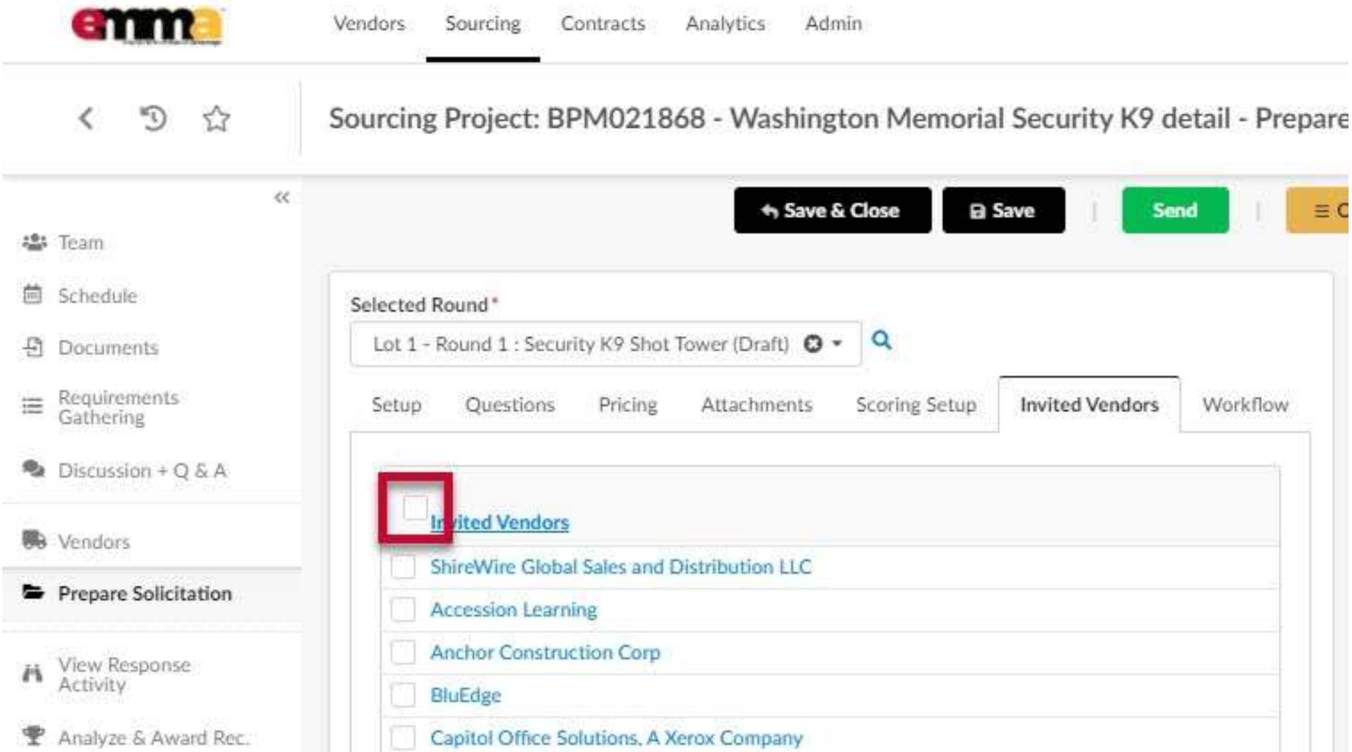


Figure 48: The checkbox to the left of the Invited Vendors column header.

57. Repeat Steps 55 & 56 until all your vendors are selected.
58. Click the **Save** button at the top of the page.
59. Click the **Send** button at the top of the Prepare Solicitation page. A new window opens with your selected vendors.

Figure 49:The Send button in the Prepare Solicitation page.

60. (Optional) Select the **Solicitation Attachments** checkbox if you have added attachments for this solicitation and you want them sent in this notification.

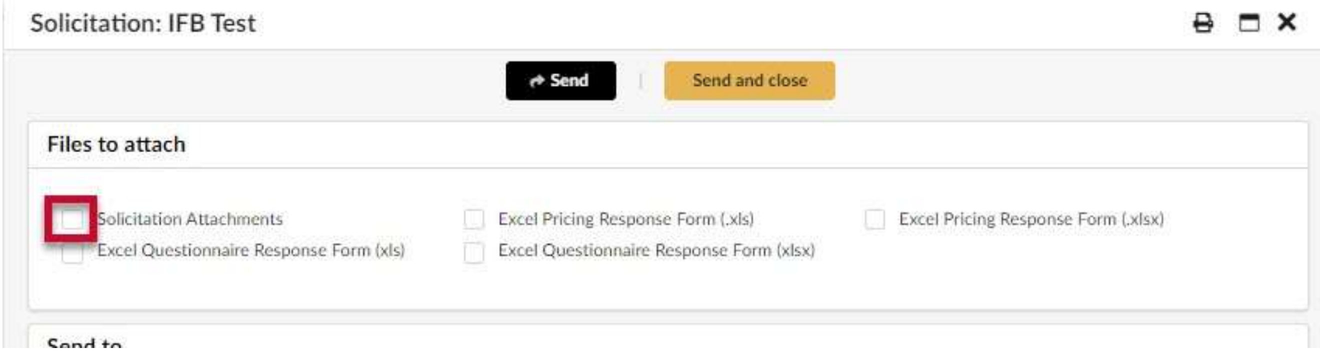


Figure 50: The Solicitation Attachments checkbox in the new window.

61. Click the **Send and close** button at the top of the Solicitation window. This notifies the vendors you selected in the Vendor tab. Two prompts display. Click **OK** for both.

Figure 51: The Send and close button in the Solicitation window.

62. Click the **X** in the corner of the Solicitation window to close it.
63. Click the **Notify Commodity Vendors** button at the top of the Prepare Solicitation page. This sends a notice to all vendors with this solicitation's specific commodity codes listed in their profiles. A prompt displays. Click **OK**.

Figure 52: The Notify Commodity Vendors button for a solicitation.

64. Click the **Publish Notification** button at the top of the Prepare Solicitation page. A prompt displays. Click **OK**.

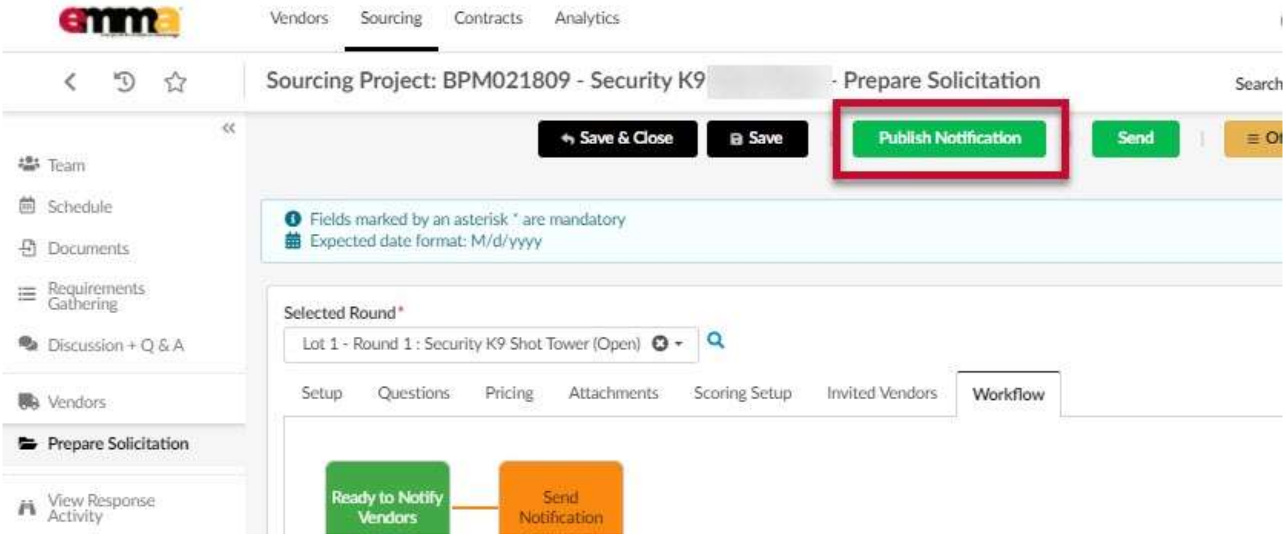


Figure 53: The Publish Notification button for a solicitation.

The Workflow subtab in the Prepare Solicitation tab shows that your message has been sent to your vendors.

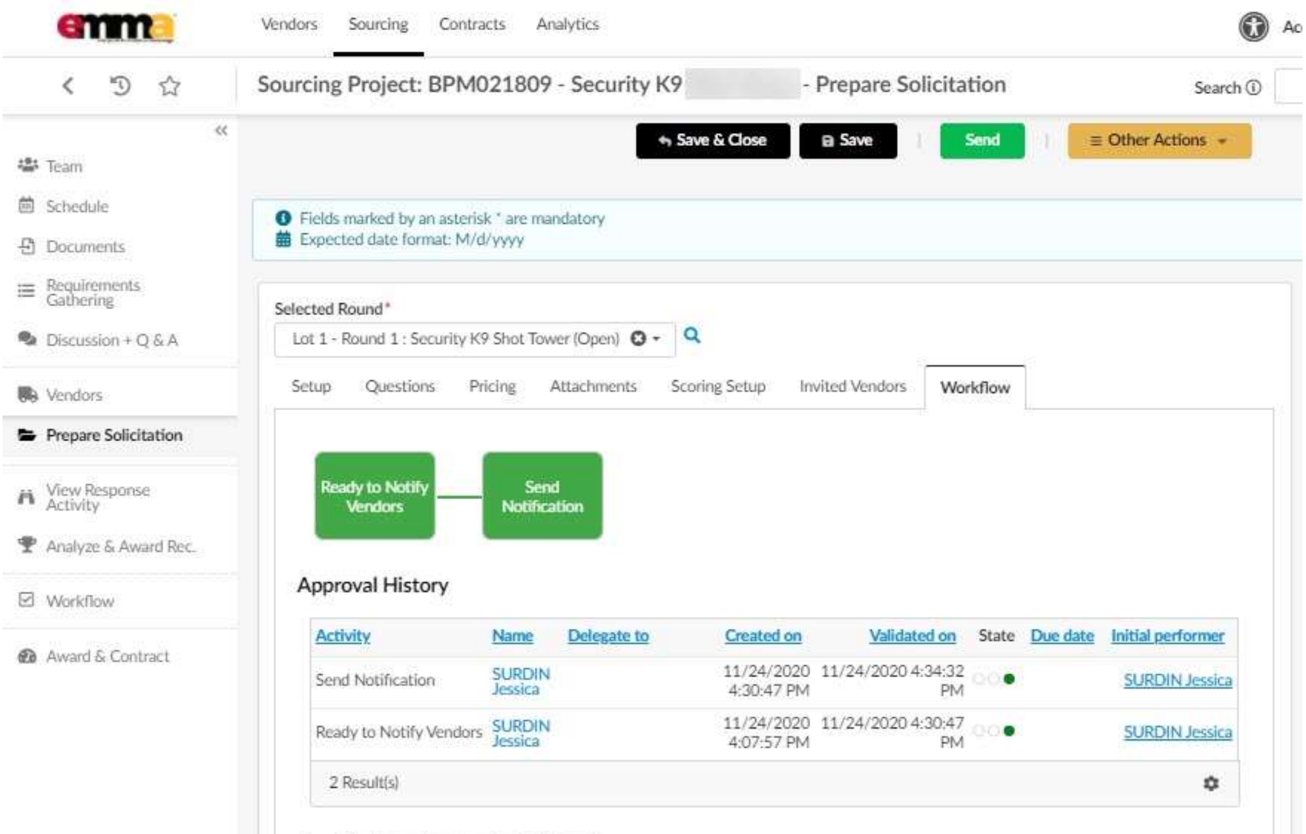


Figure 54: The Workflow subtab on the Prepare Solicitation page.

Next Steps

Wait for responses and the due date. Then see the Buyer QRG Analyze Vendor Responses in eMMA.