

## Creating eQuotes Job Aid

### Start by Creating a Sourcing Project

Select “Sourcing Project” under “Create” on the Sourcing Dashboard. This directs the Project Owner to the “Overview” page.



The screenshot shows the Sourcing 3.0 Dashboard with the following sections:

- Common Actions:** Create (Sourcing Project), Manage (Sourcing Library, Supplier Knowledge, My Tasks).
- Recently Viewed:** Roofing Project, Pilot Test - Scenario 2, Pilot Test - Scenario 1.
- My Documents:** Table with columns Title, Date, Status.
 

Title	Date	Status
Roofing Project	12/11/2012	Completed
Pilot Test - Scenario 2	7/30/2012	Completed
Pilot Test - Scenario 1	7/27/2012	Completed
- Search:** Sourcing Project, Suppliers, Knowledge Project, Event, Content Document. Includes fields for Keywords, ID, Title, and a Search button.
- My Saved Searches:** My Active Projects.
- Watched Projects:** No Items.
- To Do:** No Items.
- December 2012:** Calendar view.

### Complete Overview

There are a variety of fields to populate on the “Overview” page, which is for internal use only. The bullet points below provide brief descriptions of each suggested and required field. Required fields contain an asterisk.

- **Name:** Type a descriptive title for the eQuote (e.g. Staff Augmentation). These special characters will not be allowed in the name field (/ \ : \* ? < >).
- **Description:** Enter a brief description of the eQuote.
- **Copy from Project:** Use this option to copy a previous eQuote to a new event.
- **Project:** Select “Quick Project.”
- **Event Type:** Select “eQuote” from the dropdown.
- **Test Project:** Default is set to “No.” Leave this default as is.
- **Departments:** Select your Agency.
- **Notify Vendors?:** Select how you want to notify vendors. Selecting “Yes” prompts the system to distribute the eQuote to all vendors with matching commodity codes. MFMP advises Project Owners to select “No” and manually choose the invited vendors in a later section.
- **Owner:** This field defaults to the user creating the eQuote.
- **Commodity:** Choose the commodity code(s) that best represent the product or service needed.
- **Contract Number:** This field is not required; however, if this is a quote from a State Term Contract (STC), select the appropriate STC from the contract list (Ex. 973-561-10-1).
- Select “Create” to proceed.

**Create Sourcing Project**

To create a Sourcing Project, specify the fields below. Templates used for constructing your Sourcing Project appear in the section at the bottom of the page, and available Templates

Name: \* RFQ FY 13-14 Staff Augmentation Services

Description: To select the most qualified Staff Augmentation vendor(s) to provide expert facilitation, analysis, process engineering, requirements development, and design for business analysis.

Copy from Project: (no value)

Project:  Full Project  Quick Project

Event Type: \* eQuote

Test Project:  Yes  No

Base Language: English

Regions: (no value)

Departments: \* 720000 Department

Baseline Spend:  USD

Target Savings %:

Notify Vendors?  Yes  No

Predecessor Project: (no value)

Owner: Judson Freeman

Currency: US Dollar

Commodity: \* 973561: CONSULTAN

Contract Months:

Contract Number: 973-561-10-1

Contract Effective Date:

Number Of Available Renewals (Years):

Select the template you want to use, and answer any questions related to it to create your Sourcing Project. How you set the fields in the section above might affect which templates

eQuote Master Template

## Step 1: Rules

After selecting “Create” you will be directed to the “Rules” tab of the sourcing event.

**Rules**

These rules control every aspect of how the event works. You may change them to suit your event or accept the defaults.

**Timing Rules**

Bidding end time:  \*  Duration: 5 Days  Fixed time:   No time limit

**Market Feedback**

Can owner see responses before event closes:  Yes  No

**Message Board**

Receive emails from participants at this address:  Owner email address

**Next** **Exit**

- Identify how long your quote should remain open in the “Bidding end time” field or designate a “Fixed time” for the event. Only one option can be selected.
- In the “Market Feedback” field, select whether you want the ability to review quotes before the bid opens. The default is set to “No.” It’s highly recommend that you elect to keep the bids closed until the bidding period is over.
- Identify who should receive vendor emails in the “Message Board” field. As the Project Owner your email address is the default.
- Select “Next.”

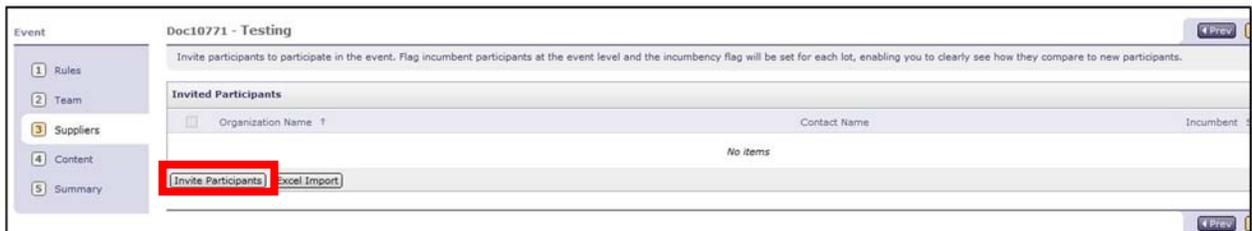
## Step 2: Team

- Additional Project Owners can be added, but be aware that Project Owners can modify information on the eQuote. To add additional Project Owners, select the “+” button, then search.
- Additional Groups can be added by selecting the “Add Group” button. Define these groups by entering a group “Title.” By changing which roles are included in this group, you can change the permissions of the members assigned to each group.
- Click “Next.”

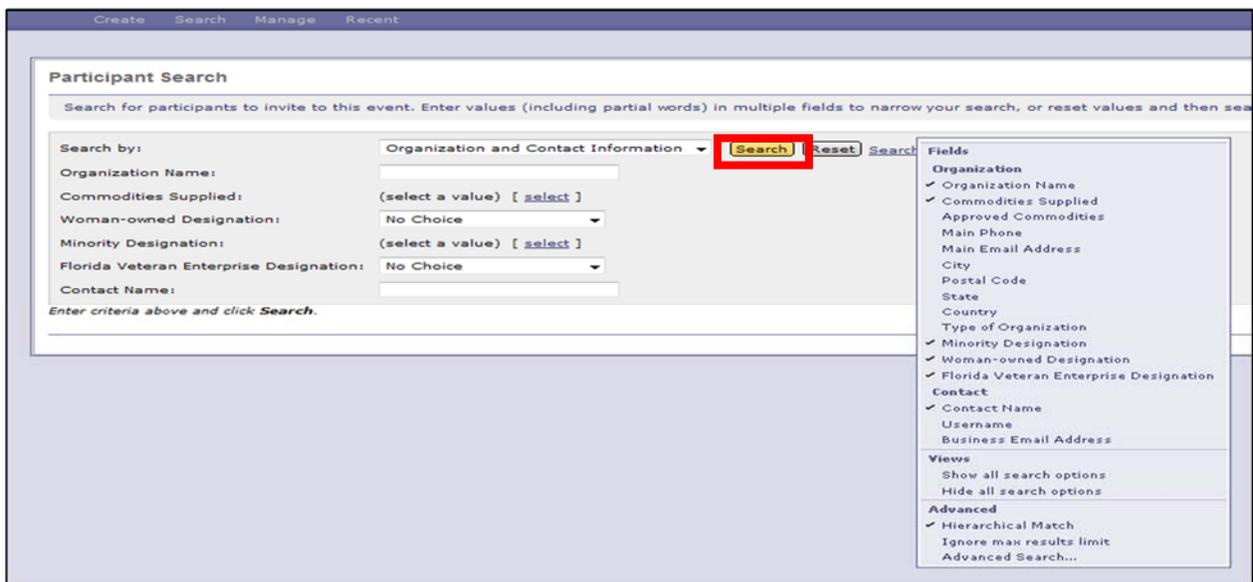


## Step 3: Suppliers

Sourcing allows you to identify specific vendors to invite. Select the “Invite Participants” button to search for vendors.



Available search fields can be added or removed as desired by using the “Search Options” link.



- Searching by “Organization (Company) Name” is the most common choice. Simply type the name and then select the “Search” button. Once the vendor is located, put a check mark in the box next to the vendor and select “OK” button at the top right of the page.
- Searching for vendors by commodity code is also an option. Simply choose the “select” link next to “Commodities Supplied”, type in the commodity code you are searching for and then click the “Search” button. The system will list all the vendors that have registered for the commodity code that you listed. Place a check in the box beside each vendor you wish to participate. When you’re done choosing vendors based on commodity code, select “Ok” to include your choices.
- Additional search options can be found under the “Search Options” link, as depicted above.
- To add additional vendors to the solicitation after making an initial choice, select the new “Invite Another Participant” button.
- Select “Next” once finished adding suppliers.

## Step 4: Content

Below is the template used to build your eQuote, including the nine required fields, denoted by asterisks (\*.) Additional information can be added or removed, as needed. Project owners can add sections, line items, questions, requirements and attachments to construct their solicitation. For in depth information on the recommended use of the “Content” section, please review a MFMP Practical Exercise or attend an eQuote Workshop. eQuote content is divided into four initial sections: “Overview, Scope and Purpose, Notes and Attachments, and Vendor Responses.”

**All Content** [filter] Display: Edit Item Actions

Name

**1. Overview**

**1.1 Contact Information / Specifications**

★ **1.1.1** Requester: \*

★ **1.1.2** Requester Email: \*

★ **1.1.3** Requester Phone: \*

**1.2 Shipping Details**

★ **1.2.1** Ship-To Address: \*

★ **1.2.2** Delivery Needed by: \*

★ **1.2.3** Rush Delivery: \* Unspecified (2 Business Days)

**1.2.4** FOB Code: \* INC-Dest: Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor files any claims.

**2 Purpose and Scope**

★ **2.1** Additional Information: \*

★ **2.2** Substitute Products: Will accept substitute products: \* Unspecified

**3 Notes/Attachments**

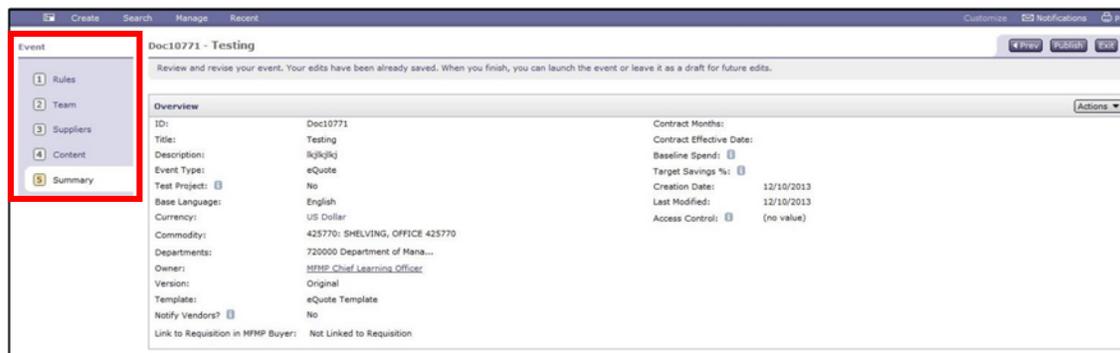
**4 Vendor Response - Agencies must build the content in this section**

|  \* indicates required field

- Section 1, “Overview” includes key contact information for the solicitation and displays the entered information, as Read Only to vendors.
- Section 2, “Scope and Purpose” provides an overview statement describing the purpose of your eQuote (Ex. Staff Augmentation.)
- Section 3, “Notes and Attachments” is intended for any documents or notes you need the vendor to see or use.
- Section 4, “Vendor Response” will contain line items for pricing and questions for vendors’ response.
- Once the initial nine fields have been populated, add line items for pricing, question fields, requirement fields and attachment fields as needed to develop a robust solicitation event. Additional Sections can be added, also.
- Select “Next” once you’ve completed adding your event content.

## Step 5: Summary

After selecting “Next” you will be directed to the “Summary” tab of the sourcing event. Review your information, if you need to make changes you can select the tabs in the left navigation to go to the appropriate sections to edit them. Once you’ve reviewed and edited the content if necessary, select “Publish”.



## Monitoring eQuotes

Once you Publish your eQuote you can access it from your dashboard by selecting the title of the solicitation from your “My Documents” tab on the dashboard.

- The “Overview” tab provides the Project Owner with a summary of the solicitation.
- The “Content” tab contains the created content entered for vendors.
- The “Suppliers” tab depicts the vendors that have been added to the solicitation.
- The “Team” tab contains a list of the team members added.
- The “Messages” tab contains any messages you send or receive from vendors.
- The “Log” tab tracks all activity related to your quote and is visible only to Project Owners.
- The “Scenario” tab allows either a system generated (Optimize) scenario or the project owner can create their own (Manual). Final Award can be made from this tab.
- The “Award” tab is where you will make the final award once the event closes.
- The “Action” button will allow management of the following changes: Pause the event, Extend timing, Reduce timing,
- Stop the event, Cancel the event, Edit the event, Print event information, Add addendums and View change history.