



## eQuote Award Scenario Job Aid

### **Scenario: Create manual and optimization scenarios to close (complete) the eQuote for Lawn Equipment**

In this scenario, you will practice creating manual and optimization scenarios to complete the eQuote. You will have the opportunity to compare summary of the scenarios, choose to notify vendors via customized email, and close the eQuote (change status to “completed”).

You can award business based on one or several scenarios. Use manual scenario to award business to suppliers for relatively simple or small events. Use optimization scenario to award business to suppliers for large or complex events.

**Background:** You created the eQuote for lawn equipment using the eQuote clinic scenario dated January 25, 2013. After your eQuote is published, you need to follow steps below to have your invited vendors submit their responses to your lawn equipment eQuote.

Once your selected vendors submit responses, and the time remaining on your eQuote clock goes to zero (0) minutes, the eQuote status changes to ‘Pending Selection’. You will then review your eQuote responses by creating scenarios to make an award decision.

**Note:** In order to work on this eQuote clinic scenario, you need to login to the vendor accounts invited to your lawn equipment eQuote, and respond. You will then be able to see the responses in your eQuote account, and create the manual and optimization scenarios.

**Note:** In order to create optimization scenarios, you must add line item(s) to your eQuote. If you don’t have line items in your eQuote, the optimization scenario option will be greyed out. You will only have the option to use manual scenario.

**Note:** Please use the MFMP Sourcing Training environment for your training activity.

Click here for: [Sourcing Training Environment \(for Agency buyers\)](#)

- Training environment username: Your username is the same as the username that you use in the “live” Production environment.
- Training environment password: “train30”

Use the following information to login as vendors, and respond to your lawn equipment eQuote.

**Note:** This step is necessary for agency buyers to get responses in the training eQuote account, and create the manual and optimization scenarios.

**Note:** Please work with your agency MFMP System Administrator for a list of training environment vendor accounts you can use.

To complete the next activities, be sure you created an eQuote (lawn equipment) in the training environment, and only invited vendors you have on the list of training environment vendor accounts. Check the list of training environment vendor accounts to see who to invite to your lawn equipment eQuote, so you can log in as a vendor and respond to your eQuote using the following steps.

**Note:** For actual eQuotes in the production environment, participants are unable to respond as vendors. You can access the Sourcing eQuote Vendor Training Environment for test scenarios.

Click here for: [Sourcing Training Environment \(for Vendors\)](#)

## Activity #1: Respond to Lawn Equipment eQuote

Follow the steps below to log into Sourcing using the vendors invited to your lawn equipment eQuote practice scenario.

Step	Monitor an active eQuote (Vendor)
1	Log into Sourcing using one of the vendors listed on the list MFMP provided to your agency for this pilot (* Remember to log in using the vendor eQuote URL provided above)
2	Select the event created in lawn equipment Scenario from the “My Events” section
3	Cycle through the Sections ( <<Prev.   Next >>) to monitor the event; Click on the “Review Event Details” link on the left hand side of the screen
4	Select the “Download Content” button (x2)
5	Select “Open” to review the event in spreadsheet format (You are viewing this information in Excel, so remember to click back to your Web session to return to the event)
6	Click “Done” to return to the event
7	Stay logged in and continue to next scenario

Step	Submit a question in an eQuote (Vendor)
1	Select “Review Agreement” (Either link on the left or the yellow button)
2	Select “I do accept the terms of this agreement”, Click OK
3	Click the “Submit Selected Lots”
4	Click “Compose Message” (Buttons at bottom of screen)
5	Type a Subject or use the default message subject (Record the subject because you will verify receipt of the message as the Buyer)
6	Type a brief message. Click “Send”
7	Stay logged in and continue to next scenario

Step	Respond to an eQuote (1 <sup>st</sup> Vendor)
1	Enter Pricing for the items in 4.1, 4.2, and 4.3
2	Click the “Update Totals” button and ensure the Extended Price calculates correctly (Price x Quantity)
3	Click Submit Entire Response (yellow button)
4	Click OK
5	Select Response History
6	Verify the Quote exists, has an ID number and an “Accepted” status. Click Done
7	Log out

Step	Respond to an eQuote (2 <sup>nd</sup> Vendor)
1	Log into Sourcing using a second vendor from the vendors listed on the list MFMP provided to your agency for this pilot
2	Select the event created in lawn equipment Scenario from the “My Events” section
3	Select “Review Agreement” (Either link on the left or the yellow button)
4	Select “I do accept the terms of this agreement”, Click OK
5	Click the “Submit Selected Lots”
6	Enter Pricing for the items in 4.1, 4.2, and 4.3
7	Click the “Update Totals” button and ensure the Extended Price calculates correctly (Price x Quantity)
8	Click Submit Entire Response (yellow button)
9	Click OK
10	Select Response History
11	Verify the Quote exists, has an ID number and an “Accepted” status. Click Done
12	Log out

## Activity #2: Create Manual Scenario

The manual scenario allows you to award specific items to individual suppliers, and split the awarding by percentage among multiple suppliers (if necessary). This scenario is useful if your awarding decision is fairly obvious and simple.

In your lawn equipment eQuote, click on ‘Content’ tab to see responses submitted by participating vendors. Use the scroll bars to scroll down and review all responses. **Note:** the eQuote status displays as ‘Pending Selection’ in the top right corner.

Doc5564 - eQuote for Lawn Equipment					
Pending Selection					
Overview <b>Content</b> Suppliers Team Report Messages Log Scenario Award					
Display: Responses					
Name ↑	Initial	Historic	Vendor Company 10	Vendor Company 11	
<b>Totals</b>					
Extended Price	\$0.00 USD	\$0.00 USD	\$13,300.00 USD	\$9,100.00 USD	
<b>1. Overview</b>					
<b>1.1 Contact Information /Specifications</b>					
1.1.1 Requester:	Linda		Linda	Linda	
1.1.2 Requester Email:	linda.mcdonald@dms.myflorida.com		linda.mcdonald@dms.myflorida.com	linda.mcdonald@dms.myflorida.com	
1.1.3 Requester Phone:	850-363-0628		850-363-0628	850-363-0628	
<b>1.2 Shipping Details</b>					
1.2.1 Ship-To Address:	4050 Esplanade Way Suite		4050 Esplanade Way Suite	4050 Esplanade Way Suite	

Now click on 'Scenario' tab to begin creating the scenarios.

The screenshot shows the top navigation bar with 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. Below it, the document title is 'Doc5564 - eQuote for Lawn Equipment'. The 'Scenario' tab is highlighted with a red box. The 'Current Scenarios' table is empty, showing columns for Name, Type, Status, Award Status, Selected Suppliers, Selected Items, Time Updated, and Extended Price. A 'Create' button is visible at the bottom left.

Under 'Scenario' tab, click on 'Create' button. Select 'Manual Scenario' from the drop-down list.

The screenshot shows the 'Create' dropdown menu open, with 'Manual Scenario' selected and highlighted with a red box. The 'Current Scenarios' table remains empty.

Populate the box labeled 'Name' with a title for your scenario. For this practice, type 'Manual Scenario' in the box.

The screenshot shows the 'Untitled Scenario' form. The 'Name' field is populated with 'Manual Scenario' and highlighted with a red box. The form includes sections for '1. Award Proposal Details' and '2. Summary'. The '1. Award Proposal Details' section is expanded, showing a table with columns for 'Name', 'Vendor Company 10', and 'Vendor Company 11'. The table contains several rows, including '1.1 Contact Information / Specifications', '1.2 Shipping Details', '2 Purpose and Scope', '3 Notes/Attachments', and '4 Vendor Response'. The '4.4 Riding Lawn Mower' row has a dropdown menu. A 'Submit for award' button is visible at the top right of the table.

Now scroll down to the 'Vendor Response' section to review vendor responses. For each line item, you will have a drop-down box. Click on the drop-down box, and select a vendor to award this item.

**Note:** Yellow star icons indicate the lowest price offered for the requested item.

**Note:** For other eQuotes where you don't have any line items, you will still have a drop-down box here to select a vendor to award the eQuote based on the vendor responses you had a chance to view under the 'Content' tab earlier.

Create Search Manage Recent

Untitled Scenario Done Save As

1. Award Proposal Details 2. Summary

Name Manual Scenario

Submit for award

Name	Vendor Company 10	Vendor Company 11
4.4 Riding Lawn Mower		
Price	\$2,500.00 USD (2)	\$1,400.00 USD (1)
Quantity	4 each	4 each
Extended Price	\$10,000.00 USD <u>Ex</u>	\$5,600.00 USD <u>Ex</u>
Allocation		
4.5 Edger		

Update Total Excel Import

Go through each item and use the same drop-down process to select a vendor. Once you have selected a vendor for each item, click on the '2. Summary' tab to view a summary of your selection.

Create Search Manage Recent

Manual Scenario Done Save As

1. Award Proposal Details **2. Summary**

Name: Manual Scenario  
 Extended Price: \$10,150.00 USD  
 Number of Participants Selected: 2  
 Number of Items Selected: 3  
 Can include bundles in optimization?: No

**Awards by Participants**

Participant	Items	Extended Price
Vendor Company 11	2	\$8,350.00 USD
Vendor Company 10	1	\$1,800.00 USD

Now click on the '1. Award Proposal Details' tab to go back to your selection page.

If you are satisfied with your selection, you can click on the orange button 'Submit for award' to complete your eQuote. However, for this practice, we would like to save your scenario and create other scenarios (using the optimization tool) for comparison. Therefore, go ahead and click 'Done' to save this scenario and return to scenario tab.

Create Search Manage Recent

Untitled Scenario **Done** Save As

1. Award Proposal Details 2. Summary

Name Manual Scenario

Submit for award

Name	Vendor Company 10	Vendor Company 11
1. Overview		
1.1 Contact Information / Specifications		
1.2 Shipping Details		
2 Purpose and Scope		
3 Notes/Attachments		
4 Vendor Response		
4.4 Riding Lawn Mower		

Update Total Excel Import

The manual scenario you just created is now displayed under the Scenario tab.

**Note:** the award status is marked 'Not Awarded' because you did not click on the orange button to submit this scenario for award yet.



Name	Type	Status	Award Status	Selected Suppliers	Selected Items	Time Updated	Extended Price
Manual Scenario	Manual	Draft	Not Awarded	2	3	2/7/2013 11:51 AM	\$10,150.00 USD

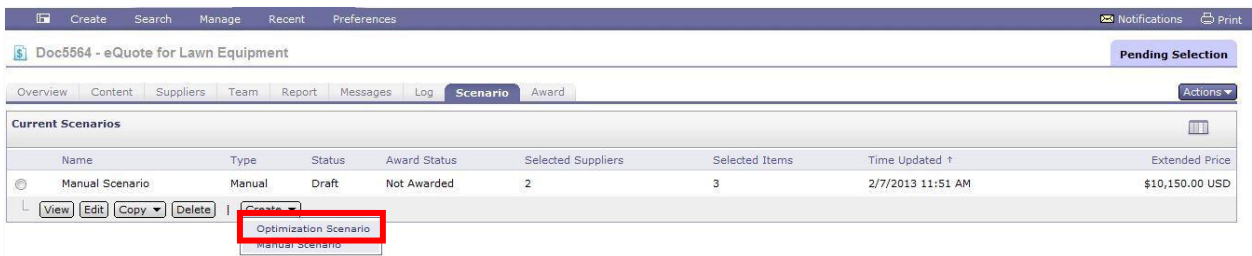
### Activity #3: Create Optimization Scenarios

Now that we demonstrated how to create and save the manual scenario under your scenario tab, we would like to use the optimization tool to create optimization scenarios and compare results with the manual scenario. The optimization scenario allows you to analyze the award decision for a large or complex event.

**Note:** Optimization scenario is only available when you have line items in your eQuote content. If you don't have any line items or lots in your eQuote, sourcing will grey out the optimization option.

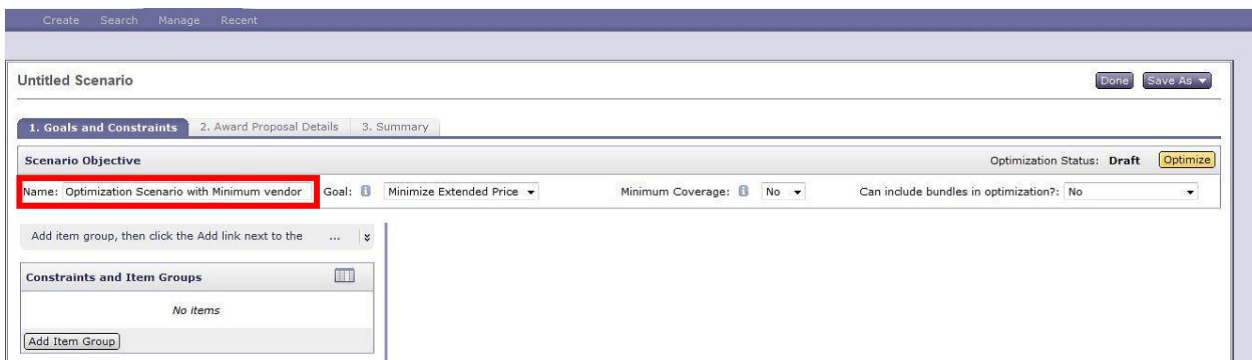
Since we are working with the lawn mower eQuote, we have added line items (for example: lawn mower, edger) to our eQuote. So we can go ahead and use the optimization tool.

You are still under the scenario tab. Click 'Create' and choose 'Optimization Scenario' from the drop down list



Name	Type	Status	Award Status	Selected Suppliers	Selected Items	Time Updated	Extended Price
Manual Scenario	Manual	Draft	Not Awarded	2	3	2/7/2013 11:51 AM	\$10,150.00 USD

Populate the box labeled 'Name' with a title for your scenario. For this practice, type 'Optimization Scenario with Minimum Vendor' in the box.



Untitled Scenario

1. Goals and Constraints 2. Award Proposal Details 3. Summary

Scenario Objective Optimization Status: Draft Optimize

Name: Optimization Scenario with Minimum vendor Goal: Minimize Extended Price Minimum Coverage: No Can include bundles in optimization?: No

Add item group, then click the Add link next to the

Constraints and Item Groups

No Items

Add Item Group

The optimization goal is set to minimize extended price. This drop-down has no other options available. Go to the 'minimum coverage' drop-down to specify whether to have minimum coverage. Minimum coverage means the smallest group of suppliers that can supply everything you need. Click on the drop-down and select 'Yes'. Selecting 'Yes' here means you get the smallest number of suppliers that can provide the lowest total cost.

**Note:** You can click on the small 'i' icon next to the drop-down box to see hints regarding minimum coverage. This icon is displayed in other areas of sourcing to provide additional hints to users about the fields.

Click on the orange button 'Optimize' to create this optimization scenario with minimal coverage.

Untitled Scenario

1. Goals and Constraints | 2. Award Proposal Details | 3. Summary

Scenario Objective

Optimization Status: Draft **Optimize**

Name: Optimization Scenario with Minimum Vendor Goal **i** Minimize Extended Price Minimum Coverage **i** Yes Can include bundles in optimization?: No

**Award as much as you can but with minimal suppliers**

Add item group, then click the Add link next to the ...

Constraints and Item Groups

No items

Add Item Group

Once optimization is done, click 'continue' working on the scenario to see the results.

Create Search Manage Recent Notifications Print

Check Optimization Status

- Optimization is done. **Continue working on this scenario.**
- [View list of scenarios.](#)

Your edits have automatically been saved as you work. Others cannot edit the event unless you exit via one of the above links.

You are now taken to the '2. Award Proposal Details' tab to see optimization results. Here you can see the selected vendor(s), selected item(s), and price(s) offered.

Create Search Manage Recent

Optimization Scenario with Minimum Vendor

Done Edit Save As

1. Goals and Constraints | **2. Award Proposal Details** | 3. Summary

This tab displays the optimization results. If no Award Participants display, run the optimizer and then view the Award Participants results.

**Submit for award**

Name ↑		
▼ 1. Overview		Vendor Company 11
▼ 1.1 Contact Information /Specifications		
▼ 1.2 Shipping Details		
▼ 2 Purpose and Scope		
▼ 3 Notes/Attachments		
▼ 4 Vendor Response		
4.4 Riding Lawn Mower		
Price		\$1,400.00 USD

Excel Export



Once you have reviewed the optimization results, click on the '3. Summary' tab to view a summary of the results.

The screenshot shows the '3. Summary' tab for an 'Optimization Scenario with Minimum Vendor'. The 'Done' button is highlighted with a red box. The summary includes the following details:

- Name: Optimization Scenario with Minimum Vendor
- Optimization Status: Optimized
- Goal: Minimize Extended Price
- Minimum Coverage: Yes
- Extended Price: \$9,100.00 USD
- Number of Participants Selected: 1
- Number of Items Selected: 3
- Can include bundles in optimization?: No

Below the summary is a table titled 'Awards by Participants':

Participant	Items	Extended Price
Vendor Company 11	3	\$9,100.00 USD

Now click on the '2. Award Proposal Details' tab to go back to your selection page.

If you are satisfied with this optimization results, you can click on the orange button 'Submit for award' to complete your eQuote. However, for this practice, we would like to save your scenario and create another scenario (optimization without minimum coverage) for comparison. Therefore, go ahead and click 'Done' to save this scenario and return to scenario tab.

The screenshot shows the '2. Award Proposal Details' tab for an 'Optimization Scenario with Minimum Vendor'. The 'Done' button is highlighted with a red box. The tab displays the optimization results. Below the details, there is a table with the following data:

Name	Vendor Company 11
1. Overview	
1.1 Contact Information /Specifications	
1.2 Shipping Details	
2 Purpose and Scope	
3 Notes/Attachments	
4 Vendor Response	
4.4 Riding Lawn Mower	
Price	\$1,400.00 USD

There is an orange 'Submit for award' button and an 'Excel Export' button.

The optimization scenario you just created is now also displayed under the Scenario tab.

**Note:** the award status is marked 'Not Awarded' because you did not click on the orange button to submit this scenario for award yet.

The screenshot shows the 'Scenario' tab with a table of 'Current Scenarios'. The table has the following columns: Name, Type, Status, Award Status, Selected Suppliers, Selected Items, Time Updated ↑, and Extended Price. Two scenarios are listed:

Name	Type	Status	Award Status	Selected Suppliers	Selected Items	Time Updated ↑	Extended Price
Optimization Scenario with Minimum Vendor	Optimization	Optimized	Not Awarded	1	3	2/7/2013 11:40 AM	\$9,100.00 USD
Manual Scenario	Manual	Draft	Not Awarded	2	3	2/7/2013 11:51 AM	\$10,150.00 USD

The first two rows of the table are highlighted with a red box. Below the table are buttons for View, Edit, Copy, Delete, and Create.

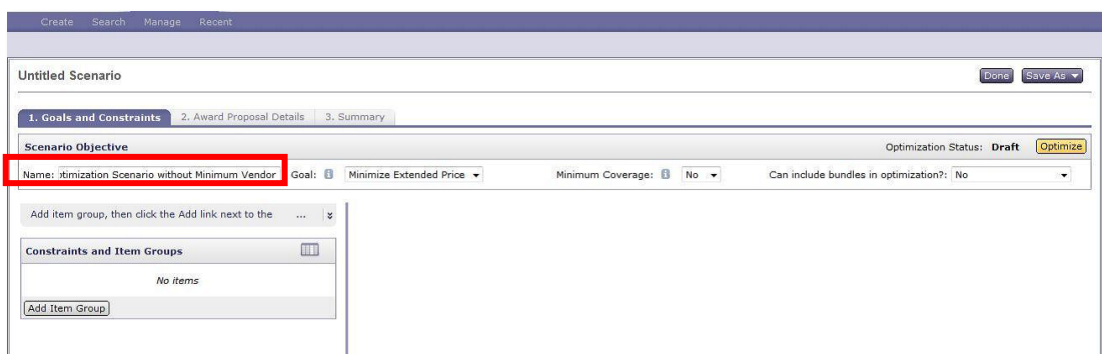


Now let's create another optimization scenario. This time, we would like to select 'No' for minimum coverage to see the results without minimizing the number of vendors.

You are still under the scenario tab. Click 'Create' and choose 'Optimization Scenario' from the drop down list.



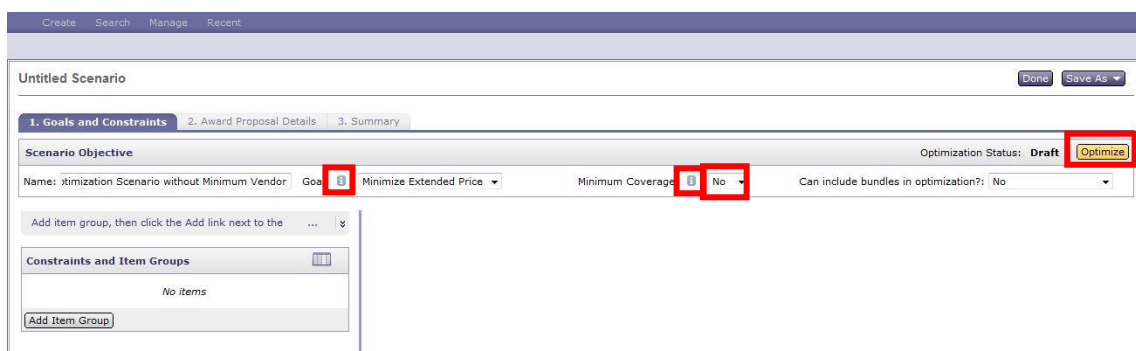
Populate the box labeled 'Name' with a title for your scenario. For this practice, type 'Optimization Scenario without Minimum Vendor' in the box.



The optimization goal is set to minimize extended price. This drop-down has no other options available. Go to the minimum coverage drop-down to specify whether to have minimum coverage. Click on the drop-down and select 'No' this time. Selecting 'No' here means you will not minimize the number of vendors and focus on the lowest possible total cost, even if it means purchasing each item from a different vendor.

**Note:** You can click on the small 'i' icon next to the drop-down box to see hints regarding minimum coverage. This icon is displayed in other areas of sourcing to provide additional hints to users about the fields.

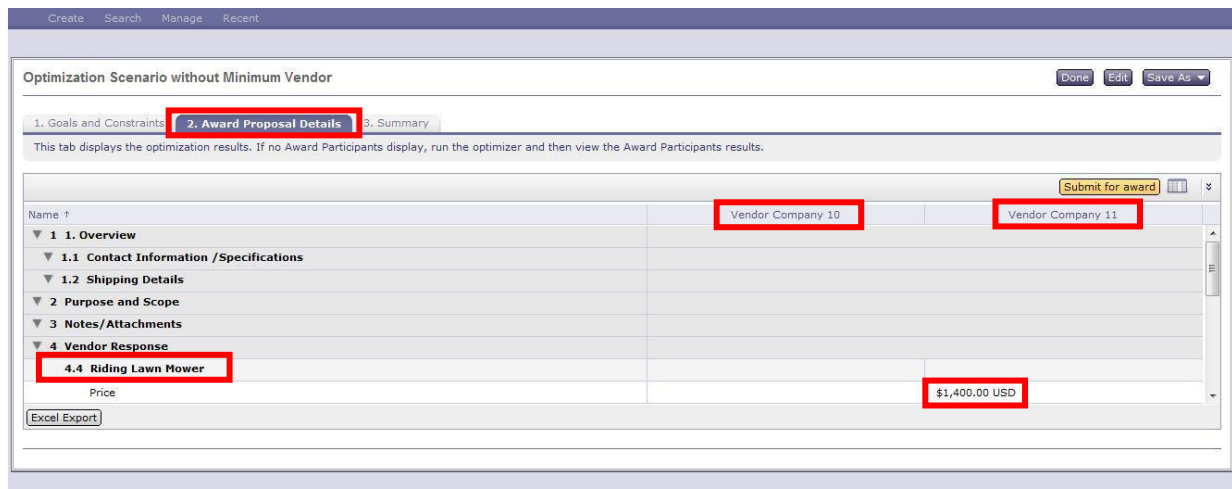
Click on the orange button 'Optimize' to create this optimization scenario without minimal coverage.



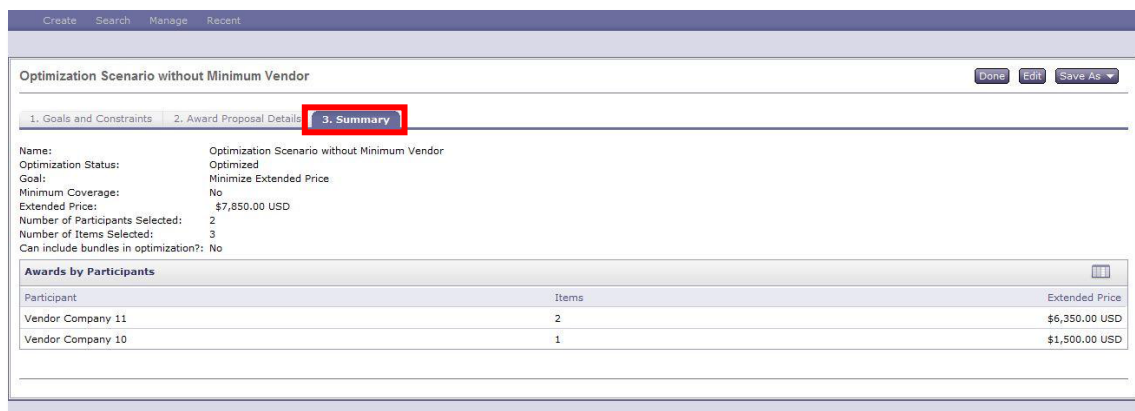
Once optimization is done, click 'continue' working on the scenario to see the results.



You are now taken to the '2. Award Proposal Details' tab to see optimization results. Here you can see the selected vendor(s), selected item(s), and price(s) offered.



Once you have reviewed the optimization results, click on the '3. Summary' tab to view a summary of the results.



Now click on the '2. Award Proposal Details' tab to go back to your selection page.

If you are satisfied with this optimization results, you can click on the orange button 'Submit for award' to complete your eQuote. However, for this practice, we would like to save your scenario and go back to the scenario tab and compare all three scenarios you created (one manual, two optimization scenarios). Therefore, go ahead and click 'Done' to save this scenario and return to the scenario tab.

Create Search Manage Recent

Optimization Scenario without Minimum Vendor Done Save As

1. Goals and Constraints 2. Award Proposal Details 3. Summary

This tab displays the optimization results. If no Award Participants display, run the optimizer and then view the Award Participants results.

Submit for award

Name ↑	Vendor Company 10	Vendor Company 11
▼ 1. Overview		
▼ 1.1 Contact Information / Specifications		
▼ 1.2 Shipping Details		
▼ 2 Purpose and Scope		
▼ 3 Notes/Attachments		
▼ 4 Vendor Response		
4.4 Riding Lawn Mower		
Price		\$1,400.00 USD

Excel Export

The optimization scenario you just created (without minimum coverage) is now also displayed under the Scenario tab.

**Note:** The award status is marked 'Not Awarded' since you did not click on the orange button to submit this scenario for award yet.

From this point, you can see a quick summary of the three scenarios you just created. The quick summary displays type of scenario (manual vs. optimization), status, award status, number of selected suppliers, number of selected items, time, and the total price.

Create Search Manage Recent Preferences Notifications Print

Doc5564 - eQuote for Lawn Equipment Pending Selection

Overview Content Suppliers Team Report Messages Log Scenario Award Actions

Current Scenarios

Name	Type	Status	Award Status	Selected Suppliers	Selected Items	Time Updated ↑	Extended Price
Manual Scenario	Manual	Draft	Not Awarded	2	3	2/7/2013 11:51 AM	\$10,150.00 USD
Optimization Scenario with Minimum Vendor	Optimization	Optimized	Not Awarded	1	3	2/7/2013 11:56 AM	\$9,100.00 USD
Optimization Scenario without Minimum Vendor	Optimization	Optimized	Not Awarded	2	3	2/11/2013 2:42 PM	\$7,850.00 USD

View Edit Copy Delete Create

## Activity #4: Submit Scenario for Award

Now that we demonstrated how to create and save the manual scenario under your scenario tab, we would like to use the optimization tool to create optimization scenarios and compare results with the manual scenario.

Create Search Manage Recent Preferences Notifications Print

Doc5564 - eQuote for Lawn Equipment Pending Selection

Overview Content Suppliers Team Report Messages Log Scenario Award Actions

Current Scenarios

Name	Type	Status	Award Status	Selected Suppliers	Selected Items	Time Updated ↑	Extended Price
Manual Scenario	Manual	Draft	Not Awarded	2	3	2/7/2013 11:51 AM	\$10,150.00 USD
Optimization Scenario with Minimum Vendor	Optimization	Optimized	Not Awarded	1	3	2/7/2013 11:56 AM	\$9,100.00 USD
Optimization Scenario without Minimum Vendor	Optimization	Optimized	Not Awarded	2	3	2/11/2013 2:42 PM	\$7,850.00 USD

View Edit Copy Delete Create

**Note:** If you select the manual scenario, it will take you to the '1. Award Proposal Details' tab. If you select one of the optimization scenarios, it will take you to the '1. Goals and constraints' tab first, then you will need to click on '2. Award Proposal Details' tab.

Once you are under the 'Award Proposal Details' tab, you would like to select this scenario for award, so go ahead and click on the orange button 'Submit for Award'.

When you submit your award, Ariba Sourcing asks if it should automatically generate emails informing both awarded and/or non-awarded participants of your decision. You can customize these emails by clicking on the 'Customize Award Emails' button.

Select the radio button next to the message template you would like to customize, and click on 'Customize' button. For the purposes of this practice, go ahead and select radio button next to 'Awarding; announcement to participant who has been awarded' and click 'Customize'.

You can customize the email template by adding content that best suits your needs. Example of language to add may be: 'Please note this is not a purchase order. This eQuote shall only become effective when the supplier has received an approved purchase order.' Once you have customized the message template to reflect your agency's message, click on 'Save'.

**Note:** Items in bracket are event information that sourcing automatically pulls to populate in the email. Please refrain from changing these brackets to avoid missing necessary information in the email to vendors.

You can now follow the same steps listed above to customize the message template for 'Non-Awarding; announcement to participant who has not been awarded' by selecting the radio button next to it and clicking on 'Customize'. For the purpose of this practice, we would not like to customize Non-Awarding email so go ahead and click 'Done'.

Message Template Name	Participant	Subject
<input type="radio"/> Non-Awarding: announcement to participant who has not been awarded	All Participants	Event [EVENT_TITLE] - Lot [ITEM_NAME] has been awarded.
<input checked="" type="radio"/> Awarding: announcement to participant who has been awarded	All Participants	Event [EVENT_TITLE] - Lot [ITEM_NAME] has been awarded.

Now you can check the box next to emails you would like to send to vendors. For the purpose of this practice, since we customized the Award email to reflect our agency's message, let's go ahead and check the box to 'Send Emails to Awarded Participants'. Leave the box unchecked for 'Send Emails to Non-Awarded Participants' because we did not customize this email and we do not want to send emails to Non-Awarded participants in here. Now click the yellow button 'Done' to complete the eQuote.

This will close the eQuote and mark the status as 'Completed'.

Name	Type	Status	Award Status	Selected Suppliers	Selected Items	Time Updated ↑	Extended Price
Manual Scenario	Manual	Draft	Not Awarded	2	3	2/7/2013 11:51 AM	\$10,150.00 USD
Optimization Scenario with Minimum Vendor	Optimization	Optimized	Not Awarded	1	3	2/7/2013 11:56 AM	\$9,100.00 USD
Optimization Scenario without Minimum Vendor	Optimization	Optimized	Awarded	2	3	2/11/2013 3:29 PM	\$7,850.00 USD

This completes the MFMP Sourcing eQuote Training Activity.

## Access and Support

Work with your agency MyFloridaMarketPlace System Administrator to get access to Sourcing eQuote.

If you have questions at any time when you are working through these activities in the Training Environment or using Sourcing eQuote in the Production environment, please contact the MyFloridaMarketPlace Customer Service Desk.

- (866) 352-3776
- [BuyerHelp@MyFloridaMarketPlace.com](mailto:BuyerHelp@MyFloridaMarketPlace.com)