Instructions for the Use of the Requirements Sheet - 2003 Version

Enable the Content:

2. Click on Tools and then, click on Macros from the drop-down list.
3. Click on Security.
4. Set the Security to Medium.
6. Click on Enable Macros.
Run The Macro to Create the Mandatory, Mandatory Scored, and Additional Scored Spreadsheets:

1. Click on Tools.
2. Click on the button called **Create Spreadsheets**.

Clicking this button creates three spreadsheets:

- Mandatory Spreadsheet
- Mandatory Scored Spreadsheet
- Additional Scored Spreadsheet

You attach these spreadsheets to your RFP Template (SPD-SP016 State Entity eRFP Template) when you post it.

3. Once the Macro has created the spreadsheets, a message similar to this one displays indicating the location where the three spreadsheets are saved (the spreadsheets are saved on the same location where the Requirements-Sheet-2003 is located).
4. Once you create the spreadsheets, you need to refine and protect them. Follow the steps in the next section.
**Adding Yes/No Selections to the Mandatory Spreadsheet to Allow a Response from the Suppliers**

Once you create the spreadsheets, you need to protect them and refine them. Follow these steps:

**Mandatory Spreadsheet:**

1. Access Microsoft Excel.
2. Open the Mandatory.xls spreadsheet.

**Adding Yes/No selections for the Suppliers to respond:**

1. To add a drop-down Yes/No selection to allow the suppliers to respond to the Mandatory requirements, click on the cell (or one of the cells) where you want to add the Yes/No selection. In this case, you want to click the first cell where the suppliers provide a response to the requirement in the Response by Offeror. Only Yes or No Answer column (row 8 and column C, in this example).

2. Once you have clicked on the cell where you want to place the Yes/No selections, click on **Data** on the Excel Main Menu Bar to list the selections available.
3. Select **Validation** from the list of selections on the drop down menu.

4. When the Validation dialog box displays, drop the list in the Allow field and select **List**.

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5. After selecting List in the Allow field, enter **Yes, No** in the Source field and click **OK**.

6. At this point, the selected cell now has a selection to enter Yes or No. Highlight the cell to copy to the rest of the cells in that column.
7. To copy, select the cell you want to copy (row 8 and column c, in this example). Then, click on the Copy icon or click on Edit and then, select Copy from the drop-down list. Then, highlight the rest of the cells where the supplier responds with a Yes or No and paste it until all appropriate cells have the drop-down list.
8. Then, highlight the rest of the cells where you want the Yes/No selection to be copied and click on **Edit**, then on **Paste** to copy the original cell.
9. Repeat step 8 for the rest of the cells where you want to copy.

**Protecting the worksheet**

Once you have setup the cells the way you need them, you are ready to protect the worksheet. Protecting the worksheet will ensure that the suppliers do not change the configuration or the contents of your worksheet.

1. Highlight the cells (column) where the supplier will respond Yes/No. Then, click on the Format tab and select Cells… from the drop-down list.
2. Click on the **Protection tab**. Then, ensure that the Locked field is deselected. Then click **OK**.

Locking cells or hiding formulas has no effect unless the worksheet is protected. To protect the worksheet, choose Protection from the Tools menu, and then choose Protect Sheet. A password is optional.
3. Click on the **Tools tab** and select Protection... from the drop-down list. Then, select **Protect Sheet**.

4. When the Protect Sheet dialog box displays, ensure that Protect worksheet and content of locked cells, Select Locked cells, and Select unlocked cells are selected. Then, enter a password that you will be able to remember and click **OK**.
5. Reenter the same password. Then, click **OK** to protect your worksheet.

![Password Protection Dialog]

6. Save the Worksheet.

**Preparing the Mandatory and Additional Scored Worksheets:**

1. For the Mandatory Scored and the Additional Scored worksheets, ensure that they print correctly. To do this:
   a. Click on **File**.
   b. Select **Page Set Up**…
   c. Select **Landscape**.

![Page Setup Dialogue]
2. Protect the worksheets as you did with the Mandatory worksheet. To do this repeat steps 1 through 6 as indicated in the previous section for the Mandatory Scored and Additional Scored worksheets. Ensure that all your worksheets are protected before you post them.

When Ready to Create the Evaluation Forms

Once you are ready to create the evaluation form (SPD-EP005 Master Technical Evaluation Template form) to send to the Evaluation Committee for evaluation of the RFP technical requirements, you need to obtain information (questions, and points assigned) from the RFP requirements worksheet (form SPD-057 Requirements Sheet for RFP or Scored RFQC).

Using the **Assist with The evaluation Worksheets** button, located on the top right of the SPD-057 Requirements Sheet for RFP or Scored RFQC form you just completed. This button allows you to obtain the information you need to complete the SPD-EP005 Master Technical Evaluation Template form.

1. Click on the button called **Assist with Evaluation Spreadsheets**.

2. The following worksheets are saved on the same folder as the one where the RFP/RFQC Requirements worksheet is located:

- A worksheet with the information you need to enter in the SPD-EP005 Master Technical Evaluation Template form for the Mandatory Scored questions (questions and points assigned to each question).
A worksheet with the information you need to enter in the SPD-EP005 Master Technical Evaluation Template form for the Additional Scored questions (questions and points assigned to each question).

The following are sample worksheets:

- Mandatory scored and points assigned worksheet.

![Mandatory scored and points assigned worksheet](image1)

- Additional Scored questions (questions and points assigned to each question).

![Additional Scored questions and points assigned worksheet](image2)
You use these worksheets to create the Master Technical Evaluation Template form by either entering the information (or copying it to) onto the evaluation form.