



# Help Guide for Invited Responders

Updated January 2019





## Welcome to RFP360

If you do not already have an account with RFP 360, then please follow the prompts provided to set up an account. You will establish a password so you can come back in anytime and work on your RFP response.

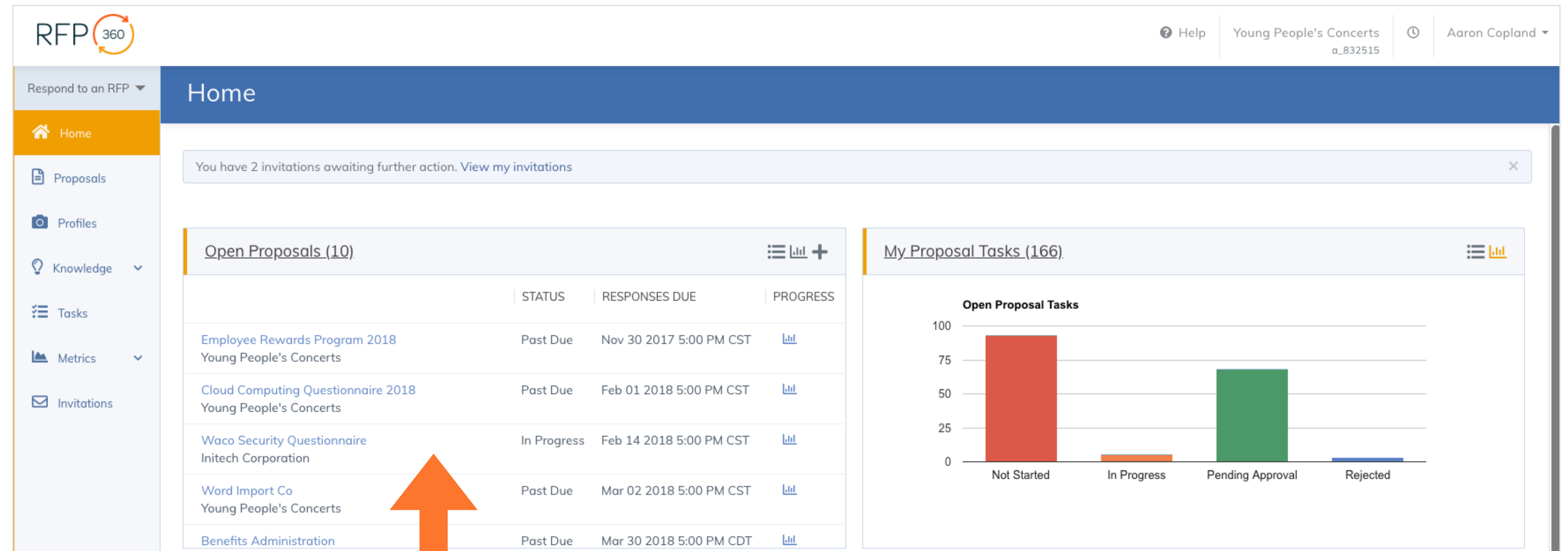
After your initial access and setup, you can access the RFP360 platform [here](#). If you forget your password, there are prompts to help you.

If you have any questions, please don't hesitate to contact us at the support number/email below or visit our [Help page](#) in the application.



## Home Dashboard

Once you are in RFP360, you'll be greeted with your **Home** dashboard.



**Proposals** are responses to RFPs.  
Click the proposal you want to work on.



## Inviting Team Members

**Invite** members of your team in the Users page.  
You will be able to assign writing and approving tasks to each user.

The screenshot shows the RFP 360 Home page. The top navigation bar includes the RFP 360 logo, a Help icon, the current user's name (Aaron Copland), and a dropdown menu. The dropdown menu is open, showing options: Billing, Accounts, Users, My Profile, Help, and Logout. An orange arrow points to the 'Users' option. The main content area has a blue header with 'Home' and a notification: 'You have 2 invitations awaiting further action. View my invitations'. Below this, there are two sections: 'Open Proposals (10)' and 'My Proposal Tasks (166)'. The 'Open Proposals' section contains a table with columns: STATUS, RESPONSES DUE, and PROGRESS. The 'My Proposal Tasks' section contains a bar chart titled 'Open Proposal Tasks' showing the distribution of tasks across four categories: Not Started, In Progress, Pending Approval, and Rejected.

	STATUS	RESPONSES DUE	PROGRESS
Employee Rewards Program 2018 Young People's Concerts	Past Due	Nov 30 2017 5:00 PM CST	<a href="#">View</a>
Cloud Computing Questionnaire 2018 Young People's Concerts	Past Due	Feb 01 2018 5:00 PM CST	<a href="#">View</a>
Waco Security Questionnaire Initech Corporation	In Progress	Feb 14 2018 5:00 PM CST	<a href="#">View</a>
Word Import Co Young People's Concerts	Past Due	Mar 02 2018 5:00 PM CST	<a href="#">View</a>
Benefits Administration	Past Due	Mar 30 2018 5:00 PM CDT	<a href="#">View</a>

**Open Proposal Tasks**

Category	Count
Not Started	95
In Progress	5
Pending Approval	65
Rejected	5

**Note:** Email notifications and reminders help you manage your team.



## Answering Questions

In a proposal, you'll **answer questions**.  
Select from drop-downs or enter text responses.

The screenshot displays the RFP 360 Annual Vendor Questionnaire interface. The top navigation bar includes the RFP 360 logo, a help icon, the user name 'Aaron Copland', and a date/time stamp 'Dec 07 2018 5:00 PM CST'. The main content area is divided into three sections: a left sidebar with a list of questions, a central question detail view, and a right sidebar with navigation and search options.

The left sidebar lists the following questions:

- 1 General (0/11)
- 2 Access Control: (0/10)
- 3 Availability: (3/5)
- 4 Data Ownership/Stewardship: (4/11)

The central question detail view shows question 4: 'How does the Software as a service (SaaS) provider's system architecture prevent unauthorized exposure of data to other parties using the same service?'. The response area includes a text input field with the following text: 'Construction Company provides high-quality PPE and safety products through our industry leading partners and through our own brand Truline. Construction Company also provides EH&S Training and consulting services to help our customers remain compliant as well as supply services and assessments. In addition, Construction Company has invested in state of the art technology to help our clients mitigate risk and take a proactive approach to preventing injuries in the workplace. Through all of the services mentioned above Construction Company provides a holistic approach to safety that will help Medtronic reduce costs, increase productivity and ensure that your workers get home safely after every shift. Attached please find a breakdown of revenue for our business lines and services.' Below the text input field is a dropdown menu with the text '--Select a Response--'. An orange arrow points to the 'Comments' text area for question 5.

The right sidebar contains a 'Save to Knowledge Base?' section with a 'NO' button. Below this is a 'Knowledge Base' section with a search bar and a list of entries. The first entry is 'How does the Software as a service (SaaS) provider's system architecture prevent unauthorized exposure of data to other parties using the same service?'. The second entry is 'Our company utilizes several document management systems and tools and the expectation is that these tools will be leveraged by the successful suppliers. Please confirm you can support the use of these tools and describe your organization's experience with other clients.' The third entry is 'and consulting services to help our customers remain compliant as well as supply services and assessments. In addition, Construction Company has invested in state of the art technology to help our clients mitigate risk and take a proactive approach to preventing... (truncated)'. The fourth entry is '10. Does the system provide the ability for users to add "ad hoc" training events through self-service and have them approved by their manager?'.

**Note:** Save your work and come back anytime to work on responses.



**Status** indicators help you track progress for your responses.

Annual Vendor Quest...

Dec 07 2018 5:00 PM CST

Filter

1 General 0/11

2 Access Control: 0/10

3 Availability: 3/5

4 Data Ownership/Stewardship: 4/11

+

Add a section

7. How do you prevent other customers from accessing MGIC data?

NS

AC

AC

AC

Click to write your response

P&C

2019

8. What controls do you have in place to ensure MGIC's sensitive business data is not leaving the virtual walls of your business?

A

AC

AC

AC

Unapprove

We have lots of controls in place. We'd love to talk to you about them.

P&C

System

2019

Cloud solutions

Knowledge (Auto)

9. How easy is it to export data from your service when moving to a new service?

IP

AC

AC

AC

Mark as Complete

Our health compliance offering is unique to other solutions available in the marketplace. There is no other offering that compares to the comprehensive breadth and depth of our end-to-end solution, which enables your complete compliance strategy through the integration of service and technology. In fact, our solution won a 2015 TekTonic Award for most innovative HR technology.

Our comprehensive solution combines a firm technology platform to provide the calculations needed with your employer mandate under eligibility and affordability. The easy-to-use graphical user interface allows you and your team to monitor and stay on top on your employer-mandate requirements.

The key differentiator of our offering is the support of a complete regulatory management service team that provides expert-level resources for compliance, including notice of coverage; annual filings; and the ability to receive, research, and respond to various exchange notices received by employers as a result of the employer-shared responsibility.

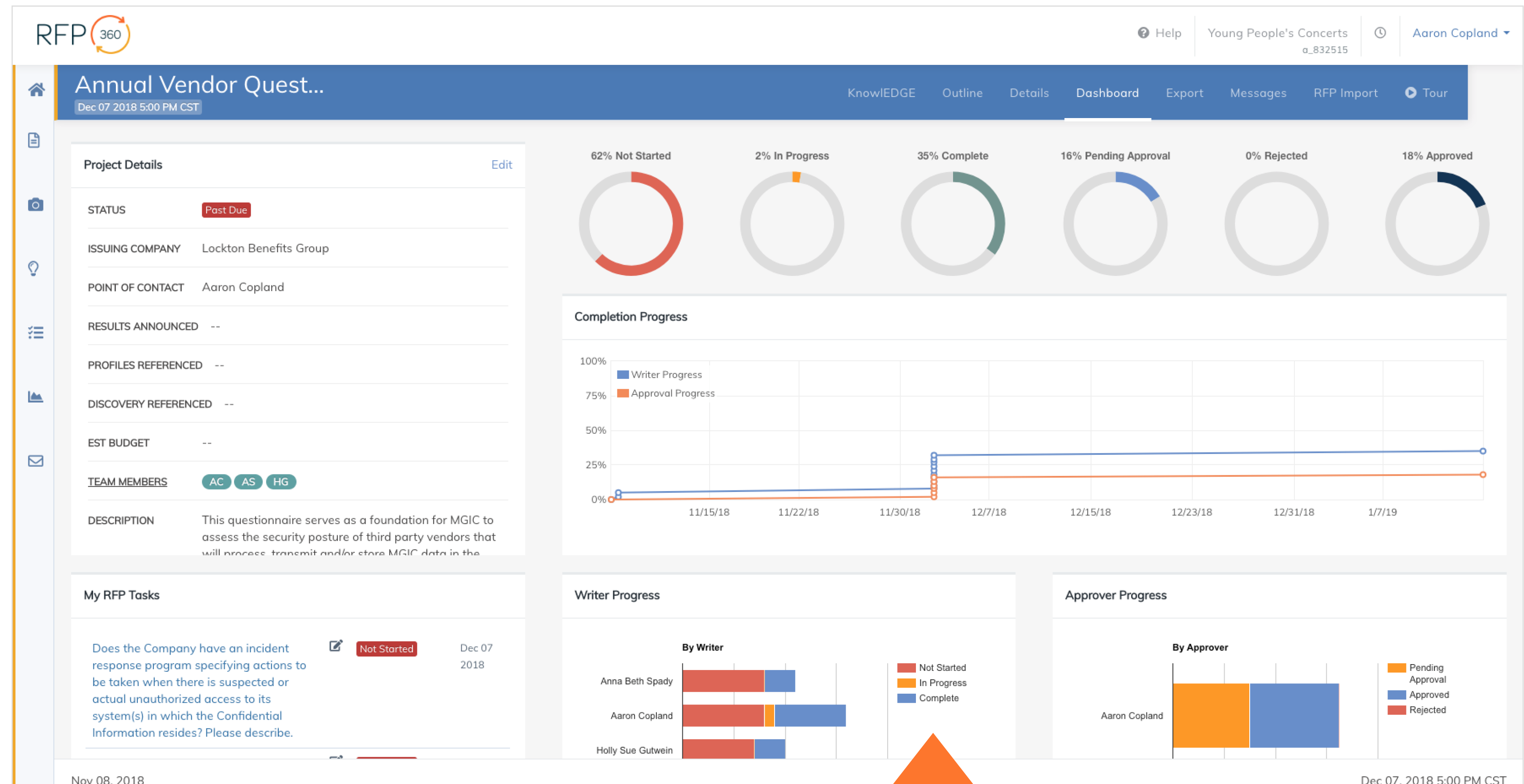
P&C

2019

Knowledge +0 / -297

Click the Proposal Dashboard for overall **proposal progress**.

See the **writing and approving status** of your proposal, by user.



## Assigning Questions

**Assign** questions to team members and set due dates.

1 General	
1. Describe the Company's business relationship with MGIC (e.g., nature of services performed).	NS AS AC
Click to write your response	
P&C 2019	
2. Will any portion of the work/service required to fulfill the contractual obligation be performed outside the United States of America, e.g. offshore? If yes, please explain.	NS AS AC
Click to write your response	
P&C 2019	
3. Will the nature of Services performed require remote access for support, administration, or other activity? If yes, please describe the access method.	NS AS AC
Click to write your response	
P&C 2019	
4. What is MGIC classification of the data that will be exchanged between MGIC and the vendor?	PA AS AC
Yes	
P&C System 2019	
Knowledge	

Save to Knowledge Base? YES

DELETE

Default Workflow

Upload Questions

Response Options

Default Writer

Anna Beth Sp...

Writer Due Date

12/07/2018

Default Approver


Aaron Copland

Approver Due Date

12/07/2018

UPDATE ASSIGNMENTS

Add a User



**Note:** If you click on a section, you can configure task assignments in bulk.



The **Text Editor** allows you to format your responses, attach files, and embed images, videos, and links

The screenshot shows the RFP 360 interface for an 'Annual Vendor Quest...' dated Dec 07 2018 5:00 PM CST. The left sidebar contains a 'Filter' button and a list of sections: 1 General (0/11), 2 Access Control: (0/10), 3 Availability: (3/5), and 4 Data Ownership/Stewardship: (4/11). The main content area is titled '1 General' and contains a question: '1. Describe the Company's business relationship with MGIC (e.g., nature of services performed).' Below the question is a rich text editor with a toolbar containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, image, video, file, table, undo, redo, and full screen. The text area below the toolbar says 'Click to write your response'. Below the text area is a tag input field with 'P&C x' and '2019 x' tags, and a prompt 'add a tag, then 'enter''. At the bottom of the editor are 'SAVE & COMPLETE' and 'SAVE DRAFT' buttons. On the right side, there is a 'Save to Knowledge Base?' toggle set to 'YES', a 'DELETE' button, and tabs for 'Knowledge Base', 'Workflow', 'Response Options', and 'Details'. The 'Knowledge Base' tab is active, showing a search bar with the text 'Describe the Company's business rel...' and a list of results, including 'Describe the Company's business relationship with MGIC (e.g., nature of services performed)' and 'Example Design Portfolio.pdf'. There are 'USE RESPONSE' and 'DETAILS' buttons at the bottom of the results list.

**Note:** Not all text areas are setup for this rich text response. If your question has drop-down options, the comments are plain text and are limited in characters.

When a writer supplies their response, they will click on the **Save and Complete** button to pass the response to the approver.

RFP 360

Help Young People's Concerts a\_832515 Aaron Copland

Annual Vendor Quest... Dec 07 2018 5:00 PM CST

Knowledge Outline Details Dashboard Export Messages RFP Import Tour

Filter

1 General 0/11

2 Access Control: 0/10

3 Availability: 3/5

4 Data Ownership/Stewardship: 4/11

1 General

1. Describe the Company's business relationship with MGIC (e.g., nature of services performed).

NS AS AC

B I U Tt- [font size] [font color] [background color] [bulleted list] [numbered list] [table] [link] [image] [video] [document] [grid] [undo] [redo] [refresh]

Click to write your response

Internal Tags ?

P&C x 2019 x add a tag, then 'enter'

SAVE & COMPLETE

Save to Knowledge Base? YES

DELETE

Knowledge Base Workflow Response Options Details

Describe the Company's business relationship with MGIC (e.g., nature of services performed).

Example Design Portfolio.pdf Please see attached document for greater details.

USE RESPONSE DETAILS

**Note:** Responses must be complete and approved to be submitted.

**Workflow** lets you configure assignments.  
**Details** show who has worked on what.

3 Availability:


1. Do you offer a Service Level Agreement (SLA) for your services? If yes, provide SLA.

Here is an example of highlighted text.

P&C System 2019 Cloud solutions Benefit Implementation and Administration

Knowledge (Auto)

2. Do you have applications and data stored in several geographically separated datacenters? If yes, how many datacenters do you have? If geographically distributed datacenters are used, what countries are involved?



Yes - in Asia, EMEA and North America to start with. More locations will be added in 2020.

Data Centers P&C 2019 Cloud solutions

Knowledge (Auto) +7 / -0

Save to Knowledge Base? ☐ NO

DELETE

Knowledge Base Workflow **Details**

Jan 15, 19 3:03 PM  
Aaron Copland updated the response

Jan 15, 19 3:03 PM  
Aaron Copland  
The response is approved

Jan 15, 19 3:01 PM  
Aaron Copland  
Response unapproved

Add Internal Comment

Enter Comment or Question

SUBMIT

**Note:** If you've used RFP360 before, you'll have Search Results from your previous proposals. We save your responses in your account.

You can send **messages** to members of your team and **questions** to the RFP Point of Contact.

The screenshot displays the RFP 360 messaging interface. At the top, the RFP 360 logo is on the left, and navigation links for Help, Young People's Concerts (a\_832515), and Leonard Bernstein are on the right. Below this is a blue header bar for the '2019 ILPA DDQ' project, with a 'Due: 2 months, and 9 days' indicator and a 'Submit' button. A secondary navigation bar includes links for Knowledge, Outline, Details, Dashboard, Export, and Messages (2). The main content area is titled 'Centralized messaging for team communication' and is split into two panels. The left panel, 'Send a Message', contains radio buttons for 'Internal Notifications' (The whole team, A team member) and 'External Notifications' (RFP Point of Contact). It also features a 'Message' text input field and an 'Attachment' section with a link to 'Add an attachment'. The right panel, 'All Messages', shows a list of messages. The first message is from Yves LeRoy to All Vendors, dated 6 days ago, with the text: 'Hi everyone, just making sure you have what you need and all questions are answered before we get too far into the holiday season. Please let Yves know!'. The second message is from Yves LeRoy, dated Jan 17, 2019 15:15 PM, with the text: 'Reply to all vendors or just you?? Voila here you go!'. The third message is from Aaron Copland to Team, dated 2 months ago, with the text: 'Ok team, our DDQ in now in the system. Please let me know if you have any questions and need the latest Firm info we just updated for the next FY'.

**Note:** Messages also kick off emails to users, so they'll see what you wrote.



## Submitting your Proposal

When your responses are **Complete** and **Approved**,  
you can Submit your proposal.

The screenshot shows the RFP 360 web application interface. At the top, the header includes the RFP 360 logo, a "Help" link, the project name "Young People's Concerts" with ID "a\_832515", and the user name "Leonard Bernstein". Below the header is a blue navigation bar for the "2019 ILPA DDQ" project, which is due in "2 months, and 9 days". The navigation bar includes a "Submit" button and links for "Knowledge", "Outline", "Details", "Dashboard", "Export", "Messages (2)", and "Tour". On the left is a sidebar with a "Filter" button and a list of sections: "1 Project Overview" (0/0), "2 General Firm Information" (2/10), "3 General Fund Information" (1/8), "4 Investment Strategy" (0/12), "5 Investment Process" (0/13), "6 Firm Team Information" (1/8), and "7 Interests & Market Environment" (0/10). The main content area is titled "2 General Firm Information" and contains two numbered questions. Question 1 asks for a brief overview of the firm, including founding, history, and plans for the next 5 years. It includes a text input area with the example text "Here is our Firm's overview: Founded in 1989 by General Tsu. Merged in 2001 with YPC and Co." and a "Firm History" button. Question 2 asks for an overview of the ownership structure, including a chart and details on ownership changes. It includes a "Knowledge" score of "+15 / -1" and buttons for "Approve" and "Reject". On the right side of the main content area, there is a "Save to Knowledge Base?" section with a "YES" button, a "Default Workflow" section, and a "Default Writer" section with a dropdown menu for "Holly Sue Gut..." and a "Writer Due Date" of "02/01/2019". Below this is a "Default Approver" section with a dropdown menu for "Aaron Copland" and an "Approver Due Date" of "02/01/2019". At the bottom right, there is an "UPDATE ASSIGNMENTS" button and an "Add a User" link.

**Note:** There is a confirmation page and an email to let you know  
it was submitted successfully.