



eMMA Training – Release 1.0

July 2019



Agenda



- Session Success
- eMMA Overview
- Creating Sourcing Project
- Preparing Solicitations
- Creating Amendments
- Analyzing and Awarding
- Creating Contract Workspace
- Next Steps

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Session Success



"Success" = Becoming familiar with eMMA
Basic understanding...

Keys to Success include:

1. Stay engaged
 - Ask questions
 - Listen
 - Take notes (QRGs will be available at GoLive)
2. Stay on-task
 - Follow Facilitator instructions and work at the pace of the class
 - Avoid the temptation to “explore”
 - Avoid email/phone calls (“interruptions”)
3. Stay on-time
 - Return from break(s) on-time

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eMMA Overview



What is eMMA?

- ✓ **Our new tool for Solicitations**
- ✓ Source to Pay (ready to pay)
- ✓ Create Purchase Orders
- ✓ Invoice capture & storage
- ✓ Expedites invoice processing

eMMA is not...

- ✗ A wholesale replacement of FMIS (State or MDOT) or an ERP
- ✗ A payment system
- ✗ A budget management system
- ✗ An inventory management solution

eMMA Overview



Terminology

Terms in eMM vs. eMMA

eMM	eMMA	Definition
n/a	Sourcing Project	The process of procuring goods and services by establishing a team, gathering requirements for a solicitation, setting up the solicitation, analyzing responses from vendors, awarding vendors, and initiating contracts
Bid	Solicitation	The actual elements of the procurement including open/close dates, price grids, questionnaires (general, technical, and/or financial), documents, vendor responses, and awards
Addendum	Amendment	Additional information or changes to an existing published solicitation provided to Vendors in a new Round (i.e., version control)
Envelope	Envelope	“Digital” envelope in eMMA; “physical” envelope in eMM
n/a	Questions	e.g., Min quals for IFB or criteria/specification for Solicitation can be developed as “questions” in eMMA
n/a	Team	People you interact with on a Solicitation (e.g., Project Managers, end users, evaluators, SMEs, etc.)
Item	Pricing Grid	Grid that lists items as part of Solicitation (quantity and UoM)

eMMA Overview



Sourcing Project Types

The Sourcing Project type determines the steps necessary in eMMA.

TYPE	DESCRIPTION
Public Notice	Publish Solicitations only; no Vendor Solicitation responses in the system. This type is available for the University Systems and Local Governments to publish solicitations.
Small Procurement (e.g. Cat 1)	A small procurement project type meant for a “3 bids and a buy”/Quick Quote scenario on purchases less than \$50,000 focused solely on lowest price award decision .
Small Procurement (e.g. Cat 2 & Cat 3)	A small procurement project type meant for purchases less than \$50,000 focused on pricing and technical criteria.
IFB: Invitation for Bid	The IFB solicitation type is for purchases over \$50,000, public and sealed with the award to the lowest price bid . This project type allows for assessing Vendors using minimum qualification criteria.
RFP: Double Envelope Proposal	A complex project type for purchases over \$50,000 requiring both technical and financial award decision criteria (double envelope). This project type is only available to State Procurement Officers and designated Contract Officers .
RFP: Triple Envelope Proposal	A complex project type for purchases over \$50,000 requiring general (e.g., EoI), technical and financial award decision criteria (triple envelope). This project type is only available to State Procurement Officers and designated Contract Officers .

eMMA Overview



Sourcing Project Types to Solicitation Type Mapping

SOURCING PROJECT TYPE	SOLICITATION TYPE
Public Notice	Public Notice
Small Procurement (e.g. Cat 1)	Quick Quote (Price Only)
Small Procurement (e.g. Cat 2 & Cat 3)	Request for Information Request for Information & Pricing Request for Quote
IFB: Invitation for Bid	IFB: Invitation for Bid (w/ Min Quals) IFB: Invitation for Bid
RFP: Double Envelope Proposal	RFP: Double Envelope Proposal
RFP: Triple Envelope Proposal	RFP: Triple Envelope Proposal

eMMA Overview



*RESERVED FOR THE NEW
eMMA LOGO
COMING JULY 22!*

CREATE SOURCING PROJECT

PREPARE SOLICITATION

MANAGE SOLICITATION

ANALYZE / AWARD

CREATE CONTRACT

- Starting point for all Solicitations
- General info – Team, schedule, tasks, etc.
- Create NEW or COPY from existing

- Setup dates, questionnaire, pricing grid, attachments
- Publish

- Q&A forum
- Amendments

- Review response activity
- Evaluate responses
- Award

- Setup header information
- Attach documents
- Publish

eMMA Overview



eMMA Training - Today

- Not Single Sign-On
- Replica of the Production Instance

eMMA Live – July 22

- Two options
 1. If SecureAuth today, you will see eMMA “button” on [connect.MD](#) portal; **or**
 2. Login via link on [procurement.maryland.gov](#) ; bookmark the eMMA link
 - Username = email; Password = <default> (change at 1st login)

eMMA Overview



eMMA Training

➤ Login to Training Instance

env01.ivalua.us/buyer/maryland/sandboxevol3/yhhnw/page.aspx/en/usr/login

Username = your eMM email address

Password = **emma.2019!**

eMMA Overview

The screenshot shows the eMMA Buying Portal interface. A red dashed box highlights the top navigation bar, which includes a logo for the Maryland State Government, a 'Logout' button, and a 'User Profile' section. Below this is a red box labeled 'Navigation' containing icons for back, forward, favorite, and homepage. A red box labeled 'Modules' points to a row of buttons for 'Vendors', 'Sourcing', 'Contracts', and 'Catalogs'. A red box labeled 'User Profile' points to the user profile section in the top right. A red box labeled 'Quick Links' points to a sidebar with buttons for creating a new supplier, sourcing project, or contract. The main content area displays sections for 'My pending validations' (0 Result(s)), 'Contract expiring soon' (0 Result(s)), and 'Vendors w Missing Credentials/Documents' (0 Result(s)).

Navigation

- Go back one screen
- Select a previously viewed page
- Create a "Favorite"
- Returns to "Homepage"

Modules
Work areas visible to you (based on your role in eMMA)

User Profile
Allows you to manage basic profile settings

Quick Links

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Creating Sourcing Project



NOTES



Functionality includes:

- Define the internal team, key dates / schedule, etc.
- Communicate with the team and invited vendors through a centralized common tool
- Upload and distribute all documents related to the Solicitation
- Invite Vendors that are either already approved or potential vendors to complete and submit contents of the Solicitation
- Prepare, manage, and award Solicitations

Creating Sourcing Project

PROCESS



1. Click “Sourcing” module >> select **Create Project**
2. Complete all mandatory fields
3. Click **Save**

OR

1. Click “Sourcing” module >> select **Browse Sourcing Projects**
2. Click **Duplicate Project**
3. Select project and sections to duplicate
4. Update/complete all mandatory fields
5. Click **Save**



PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
REQ	REQ	REQ	REQ	REQ

Creating Sourcing Project - Team

PROCESS



From the Sourcing Project:

1. Click “Team” tab
2. Click  to select user(s)
3. Close window
4. Click **Save**
5. Adjust profiles for team, as needed



PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
n/a	n/a	OPT	OPT	OPT

Creating Sourcing Project - Messages



PROCESS



From the Sourcing Project:

1. Click “Discussion + Q&A” tab (left)
2. Click **New Message**
3. Complete all mandatory fields
4. Enter message and add attachment (if needed)
5. Click **Send**



PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
n/a	OPT	OPT	OPT	OPT

Creating Sourcing Project - Schedule



PROCESS



From the Sourcing Project:

1. Click “Schedule” tab (left)
2. View the pre-populated schedule

PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
n/a	n/a	OPT	OPT	OPT

Creating Sourcing Project - Documents



PROCESS



From the Sourcing Project:

1. Click “Documents” tab (left)
2. Click **Create a document for this process**
3. Complete all mandatory fields
4. Click or drag to add files
5. Click **Save & Close**
6. Repeat, as needed



PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
n/a	n/a	OPT	OPT	OPT

Creating Sourcing Project - Vendors

PROCESS



Sends direct communication to vendors

From the Sourcing Project:

1. Click “Vendors” tab (left)
2. Click  to search for and select Vendors; eMMA filters to Vendors associated with main category (if available)
3. Close window
4. Click **Save**



PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
REQ	REQ	REQ	REQ	REQ

Creating Sourcing Project



TIPS



- Team profiles
 - “Responsible” – Owner of Sourcing project (“read”, “view” and “edit” access); all Vendor communications will come to the “Responsible”; only one per project
 - “Contributor” – Ability to view the project, edit project information/team/ schedule/documents, and view response activity
 - “SME” – Can be assigned tasks, can receive email notifications (Forum messages), and respond to Requirements Gathering questions or Evaluate/Score when invited
- Prior to creating a Sourcing project, you must know the Sourcing project type, main category, and issuing Agency.
- The Sourcing project type determines the steps (eMMA tabs) and Solicitation type(s) available.

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Preparing Solicitations

NOTES

Functionality includes:

- Setup Solicitations with dates, questionnaires, price grids, and/or documents
- Monitor vendor answers
- Evaluate (General, Technical, Financial) Vendor proposals
- Analyze vendor responses and make award
- Initiate the contracting process

Preparing Solicitations – Setup

PROCESS



1. Click “Prepare Solicitation” tab (left)
2. Add title, select “Solicitation Type” (if available)
3. Complete all mandatory fields
4. Complete all dates in “Response Dates” section (Published, Due/Close, Public Portal Publish, and Public Portal Archive) if not auto-populated
5. Click **Save**



PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
REQ	REQ	REQ	REQ	REQ

Preparing Solicitations – Dates



DATE TYPE	DEFINITION
Publish	<p>The date/time the bidders/vendors can start submitting responses.</p> <p>Will update if Solicitation is sent/published prior to date/time entered.</p>
Due/Close	<p>The date/time when Bidders/Vendors can no longer submit responses.</p>
Public Portal Publish	<p>The date/time this solicitation will be visible on the public bid board.</p>
Public Portal Archive	<p>The date/time the solicitation will be hidden from the public bid board.</p> <p>This is defaulted to seven (7) years from “Due/Close” date.</p>

Preparing Solicitations – Attachments



PROCESS



1. In “Prepare Solicitation” tab, click “Attachments” sub-tab
2. Click **Create a Document**; select “Document Type”
3. Complete all mandatory fields; update “Status” as needed
4. Click or drag to add files
5. Click **Save & Close**
6. Repeat, as needed



PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
OPT	OPT	OPT	OPT	OPT

Preparing Solicitations – Questionnaire



PROCESS



1. From the “Prepare Solicitation” tab, click “Questions” sub-tab
2. Click **+Add a line** to add a new section
3. Click **+Add a line** to add a new question
4. Click **Save**
5. Repeat, as needed
6. Click **Preview** to view Solicitation from Vendor perspective



PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
OPT	OPT	OPT	OPT	OPT

Preparing Solicitations – Scoring

PROCESS



- All questions can be scored based on scoring parameters determined by the Procurement Officer
- Evaluators can be assigned by the Procurement Officer

PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
n/a	OPT	OPT	OPT	OPT

Preparing Solicitations – Pricing Grid



PROCESS



1. From the “Prepare Solicitation” tab, click on the “Pricing” sub-tab; a pre-populated Pricing grid displays
2. Complete information for first item, click **Save**; repeat as needed

NOTE: Export/import functionality available for Excel to add items



PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
n/a	OPT	OPT	REQ*	OPT

*Specific IFBs that require items in eMM today must use pricing grid in eMMA

Preparing Solicitations – Open/Publish



PROCESS



1. From the “Prepare Solicitation” tab, click “Setup” sub-tab
2. Click  ; provides view that Vendors will see
3. Close the preview, click 
4. Review
 -  Blocking alerts – Must be cleared to proceed
 -  Non-blocking alerts – Cautionary only
5. Validate status has changed from “Draft” to “Open”



PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
REQ	REQ	REQ	REQ	REQ

Preparing Solicitations

TIPS



- Common Blocking Alert – “Due/Close Date” must be in the future.
- You can create your own Questionnaire and Pricing Grids for Solicitations (QRGs available); these can be used as templates for future Solicitations.
- If you want to share the Solicitation with an unregistered Vendor, you can send a link to the Solicitation and ask them to view. The Vendor can then choose to register.
 1. Note the Solicitation ID number;
 2. Log-out and search for ID on public portal; and
 3. Copy/send the link to the page.

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Creating Amendments

NOTES

- Providing any additional information/updates to an existing Solicitation creates an Amendment
- An Amendment requires a new Round to be created in eMMA
- All information from the previous Round can be brought into the new Round

Creating Amendments

PROCESS



1. In “Prepare Solicitation” tab, click **Other Actions**, select **Create a new round**
2. Duplicate information from previous round, as needed
3. Click **Create**, review “Warning”, click **Continue**
4. Click “Attachments” sub-tab
5. Click **Create a Document**; select “Document Type” (Amendment)
6. Complete all mandatory fields; update “Status” as needed
7. Click or drag to add files
8. Click **Save & Close**, repeat, as needed
9. Click **Send**, review “Warning” questions



PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
OPT	OPT	OPT	OPT	OPT

Creating Amendments

TIPS



- **If a Vendor asks a question that results in an amendment, you must respond using an Amendment so that all Vendors get the information.**
- Attach a document that explains the update(s) made to the Solicitation (attach a document of “Amendment” type).
- If a Vendor responds to a solicitation prior to an Amendment being published, the Vendor will receive an email notification regarding the Amendment; the Vendor will need to resubmit their response.



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Analyzing and Awarding



NOTES

- Awards may be created by pre-defined algorithms in eMMA or by your own analysis
- Awards can be to a single Vendor or multiple Vendors using
 - Percentage/amount
 - Items/lots

Analyzing and Awarding

PROCESS



View Response Activity

1. Click "View Response Activity" tab
2. View Vendor activity, including:
 - a. Vendors that received email
 - b. Vendors that accessed and added Solicitation
 - c. Vendors that intend to respond
 - d. Vendors that responded

PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
OPT	OPT	OPT	OPT	OPT

Analyzing and Awarding

PROCESS



Unseal Bids

1. Go to “Prepare Solicitation” tab, click **Open Sealed Responses**

NOTE: This is only available after due date.

PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
n/a	n/a	n/a	REQ	REQ

Analyzing and Awarding

PROCESS



Analyzing

1. From the “Analyze & Award Rec.” tab, click the “Bids / Proposals” sub-tab
2. View, download, and/or compare responses, as needed

PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
n/a	OPT	OPT	REQ*	OPT

*Specific IFBs require Vendors to respond electronically

Analyzing and Awarding

PROCESS



Awarding

1. From the “Analyze & Award Rec.” tab, click the “Awarding” sub-tab
2. Choose “Award Strategy” algorithm, “Manually Award”, or “Award All”, as needed
3. Click **Confirm Award**, when final; review warning
4. From the “Award & Contract” tab, view populated results
5. Initiate notifications to “Apparent Awardee” Vendor

NOTE: The Vendor is considered to be “Apparent Awardee” until contract is finalized.

PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
n/a	OPT	OPT	REQ*	OPT

*Specific IFBs require Vendors to respond electronically

Analyzing and Awarding

TIPS



- A green checkmark indicates the Vendor to be awarded for each item.
- Before making the award, look at Vendor profile to verify procurement program(s), if required.
- If a contract cannot be negotiated with “Apparent Awardee”, use the “Invalidate Award” function and begin new Award.
- If the contract is negotiated with “Apparent Awardee”, use eMMA to notify non-awarded Vendors.

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Creating Contract Workspace



NOTES

- Centralized contract management tool that enables collaboration and enhances contract visibility and compliance
- Create contracts directly from Solicitations or “from scratch”
- Search for contracts (including PDFs), and manage contract hierarchies and parent/child relationships
- Manage contract commitments and milestones in one place and get reminders as critical renewal or expiration dates approach

Creating Contract Workspace

PROCESS



Creating from Solicitation

1. From “Award and Contract” tab, click “Create/Update a contract”
2. Complete all mandatory fields; select information to be included from Solicitation
3. Click **Save & Close**

PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
n/a	REQ	REQ	REQ	REQ

Creating Contract Workspace

PROCESS



For NEW Contract Workspaces

1. Click “Contracts” module, select **Create Contract**
2. Complete all mandatory fields; indicate if “Public Contract”
3. Click **Save**



PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
n/a	REQ	REQ	REQ	REQ

Finalizing Contract Workspace



PROCESS



1. From the “Contracts” module
 - a) Click “Contacts” tab, add internal contacts/team member(s); click **Save**
 - b) Add vendor contact(s); click **Save**
 - c) Click “Negotiated Terms” tab, add information, as needed; click **Save**
 - d) Click “Price List” tab, add items, as needed; click **Save**
 - e) Click “Documents” tab, add documents, as needed; click **Save**
2. Click **Finalize**
3. Click **Publish**; review warnings



PUBLIC NOTICE	SP – CAT 1	SP – CAT 2/3	IFB	RFP
n/a	REQ	REQ	REQ	REQ

Creating Contract Workspace



TIPS



- If you indicate contract is “Public”, the price list will be public.
- Indicate document attachments as “Contract” (internal) or “Public”.

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Next Steps

Transition

- eMM – Shutdown at 5pm ET, Wednesday, July 17
- eMMA – Launches at 8am ET, Monday, July 22



User reference materials

- Quick Reference Guides (QRGs)
- Videos
- FAQ

- Log-in support
- User access requests
- Questions on how to use eMMA

eMMA Help Desk

emma.helpdesk@maryland.gov

Next Steps



Cutover Activities – New Solicitations

DATE	ACTION	ADD'L INFO
Wednesday, July 17, 2019 5pm ET	No new solicitations can be created in eMaryland Marketplace (eMM) after this time.	The current eMaryland Marketplace (eMM) will be offline; you will not be able to log-in or access the system after July 17. Be sure to retrieve any information needed from eMM <u>before this date/time</u>.
Monday, July 22, 2019 8am ET	The new eMaryland Marketplace Advantage (eMMA) will be online and available.	New solicitations will be entered in eMMA. We recommend that you extend your bid closing date by at least three (3) weeks to allow vendors time to enter response data in the new system.

Next Steps



Cutover Activities – Existing Solicitations

STATUS AS OF JULY 17	IF	THEN
OPEN	Your solicitation is " <u>OPEN</u> " and receiving vendor responses <u>electronically</u> in eMM as of Wednesday, July 17 (5pm ET).	<p>Vendors will need to re-submit their response (online) in eMMA beginning on Monday, July 22, 2019.</p> <p>NOTE: For electronic responses only -- We recommend that you extend your bid closing date by at least three (3) weeks to allow vendors time to enter response data in the new system. In addition, you should allow Vendors to resubmit through the following options:</p> <ol style="list-style-type: none">1. Resubmit via eMMA (electronically);2. Resubmit via paper response format; or3. Resubmit via secure/password-protected email.
OPEN	Your solicitation is " <u>OPEN</u> " and receiving vendor responses <u>via paper</u> as of Wednesday, July 17 (5pm ET).	<p>Vendors will be able to view the open solicitation (online) in eMMA beginning on Monday, July 22, 2019.</p> <p>NOTE: For paper responses only -- We recommend that you extend your bid closing date by two (2) days to allow vendors time to view solicitations.</p>

Next Steps



Cutover Activities – Existing Solicitations

STATUS AS OF JULY 17	IF	THEN
CLOSED	<p>Your solicitation is <u>CLOSED</u> but has <u>not been awarded</u> by Wednesday, July 17 (5pm ET).</p>	<p>FOR ELECTRONIC RESPONSES...</p> <ol style="list-style-type: none">1. You will need to open the sealed bids and download applicable electronically-submitted response data <u>(in eMM) prior to July 17</u>.2. You will make the award in the new eMMA system beginning on Monday, July 22, 2019.3. You will create and publish the new contract in the new eMMA system beginning on Monday, July 22, 2019. <p>FOR PAPER RESPONSES...</p> <ol style="list-style-type: none">1. You will follow the <u>current</u> process to analyze and award the solicitation.2. You will create and publish the new contract in the new eMMA system beginning on Monday, July 22, 2019.

Feedback

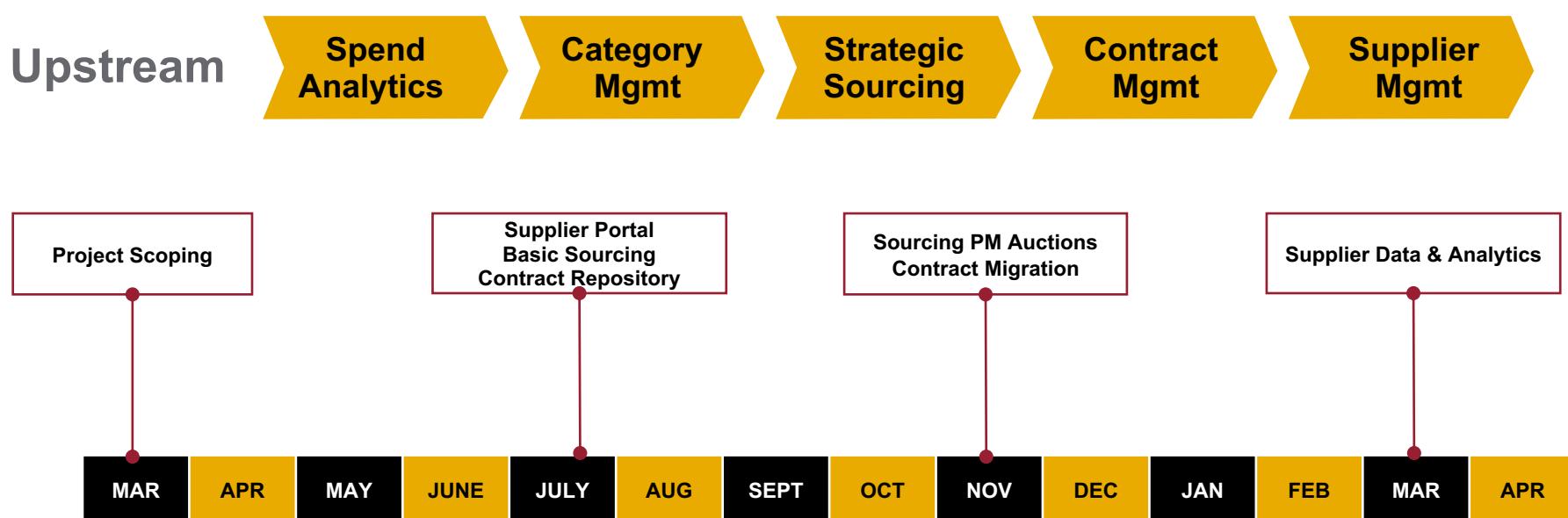


www.surveymonkey.com/r/JZVYN6J

APPENDIX



Timeline – “Upstream” (Release 1)



NOTE: Dates above are tentative

Timeline – “Downstream” (Release 2)

Downstream

eProcurement

Invoice and
Payment

Governance

