

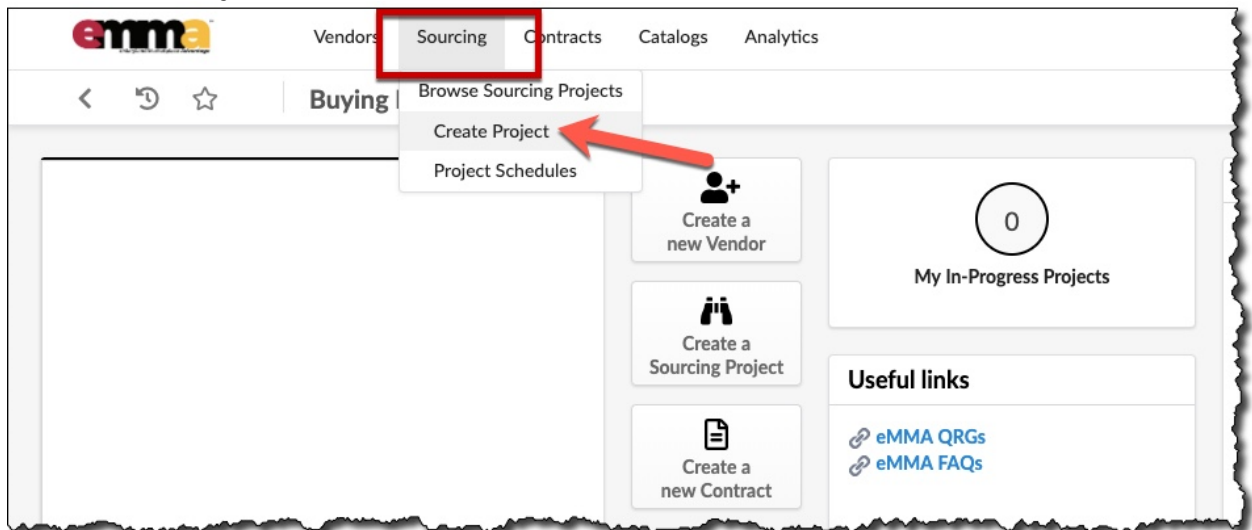
### OVERVIEW

This Quick Reference Guide (QRG) is designed to help you (*Procurement Officers & Buyers*) understand how to create *Public Posting Sourcing Solicitations* in eMaryland Marketplace Advantage (eMMA).

**Public Posting Sourcing Solicitations:** A solicitation that is published via eMMA and made visible to Vendors. Vendors do not respond via eMMA. This solicitation type is made available to University Systems and Local Governments.

### SECTION 1: Navigate to the eMMA Home Screen

1. Access eMMA via SecureAuth or your login.  
IMPORTANT: For best results, access eMMA via Google Chrome.
2. Select the **Sourcing** module at the top of the home screen.
3. Click “**Create Project**” to continue.

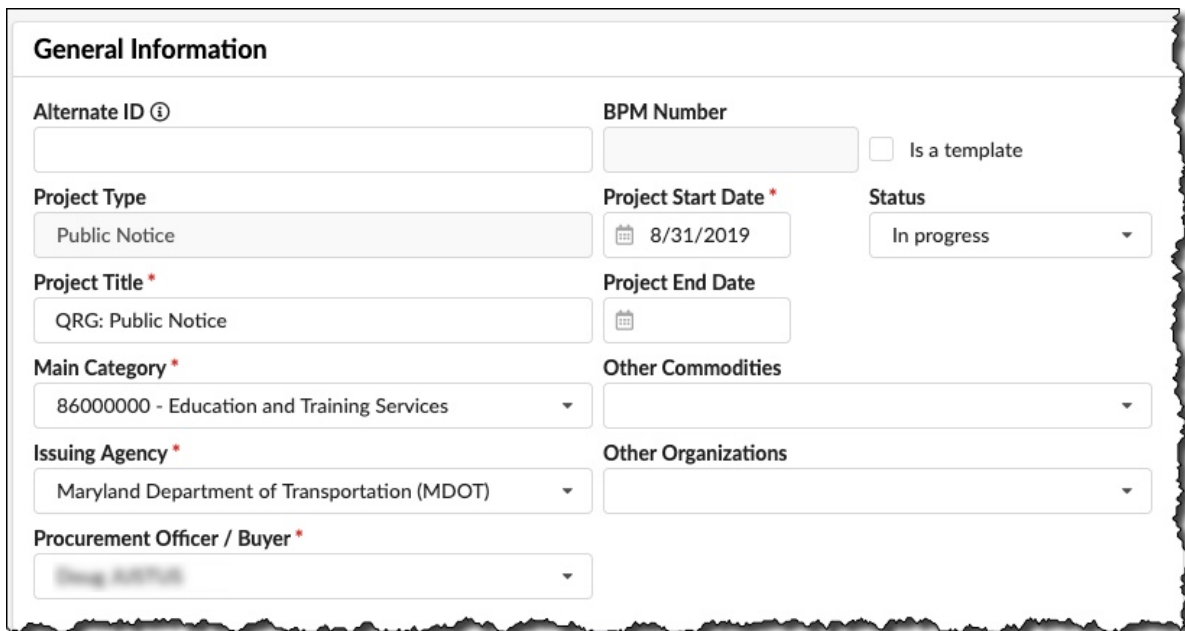


### SECTION 2: General Information

**NOTE:** All fields marked with a red asterisk to the right are required and must be completed in order to proceed

Complete the *General Information* required fields as indicated within the **Project Info** step :

1. **Project Type:** Select the **Public Notice** option from the drop-down menu
2. **Project Title:** Enter an appropriate title for the Sourcing Project
3. **Main Category:** Select a category from the drop-down or click "See All" to search commodities
4. **Issuing Agency:** Insert the name of the issuing agency of the Sourcing Project; the "See All" search function may also be utilized on this field
5. **Procurement Officer / Buyer:** Enter the name of the Procurement Officer / Buyer of the Public Posting Sourcing Project
6. **Project Start Date:** Enter the Project Start date



The screenshot shows the 'General Information' form with the following fields and values:

|  |                                   |  |
|--|-----------------------------------|--|
| Alternate ID ⓘ   | BPM Number                        | <input type="checkbox"/> Is a template |
| Project Type<br>Public Notice                                    | Project Start Date *<br>8/31/2019 | Status<br>In progress                  |
| Project Title *<br>QRG: Public Notice                            | Project End Date                  |  |
| Main Category *<br>86000000 - Education and Training Services    | Other Commodities                 |  |
| Issuing Agency *<br>Maryland Department of Transportation (MDOT) | Other Organizations               |  |
| Procurement Officer / Buyer *<br>Shirley A. [Name]               |                                   |  |

- Once the required criteria is complete, click the "Save" button at the top of the screen

### SECTION 3: Additional Information

**NOTE:** All fields marked with a red asterisk to the right are required and must be completed in order to proceed

Complete the *Additional Information* required fields as indicated within the **Project Info** step :

1. **Federal Funding:** Indicate the status of the **Federal Funding**
2. **SBR Description:** Enter the **Small Business Reserve** description
3. **MBE Goal:** Indicate the **Minority Business Enterprise** Goal Status
4. **VSBE Goal:** Indicate the **Veteran-Owned Small Business Enterprise** Goal Status

#### Additional Information

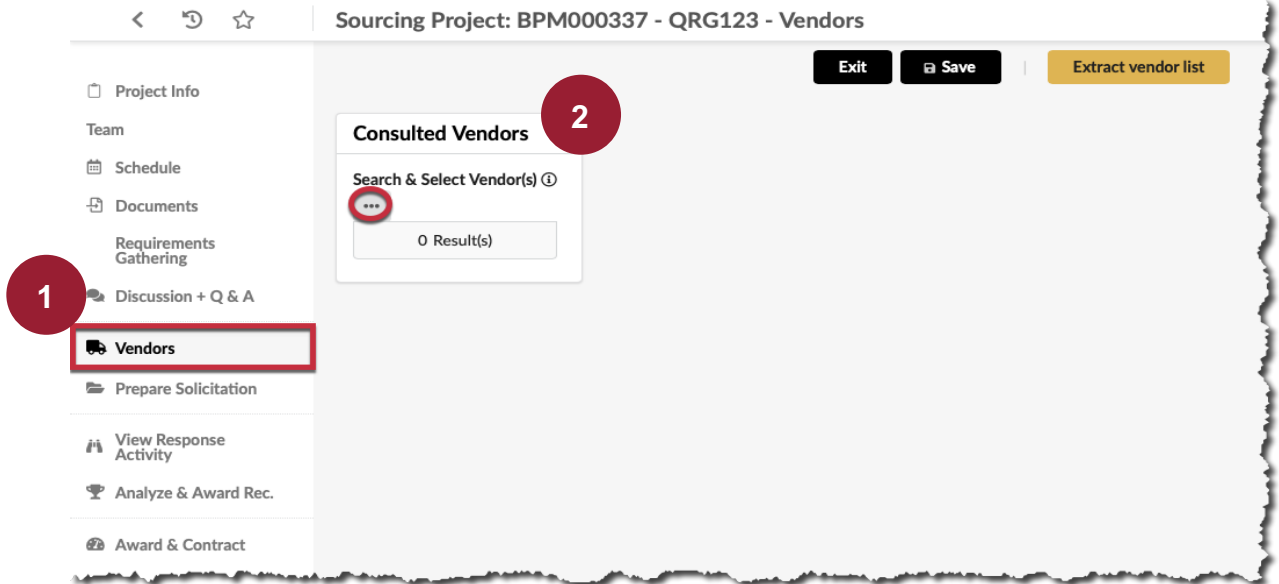
|  |                                 |                           |                           |
|--|---------------------------------|---------------------------|---------------------------|
| <b>Federal Funding *</b>                 | <b>SBR Designation *</b>        | <b>Project Estimate</b> ⓘ | <b>Project Cost Class</b> |
| <input type="text" value="No"/>          | <input type="text" value="No"/> | <input type="text"/>      | <input type="text"/>      |
| <b>MBE Goal? *</b>                       | <b>MBE Participation (%)</b>    |                           |                           |
| <input type="text" value="Yes"/>         | <input type="text" value="25"/> |                           |                           |
| <input type="checkbox"/> MBE Sub-Goal? ⓘ |                                 |                           |                           |
| <b>VSBE Goal? *</b>                      | <b>VSBE Participation (%)</b>   |                           |                           |
| <input type="text" value="Yes"/>         | <input type="text" value="25"/> |                           |                           |

➤ Once the required criteria is complete, click the “Save” button at the top of the screen

### SECTION 4: Select Vendors

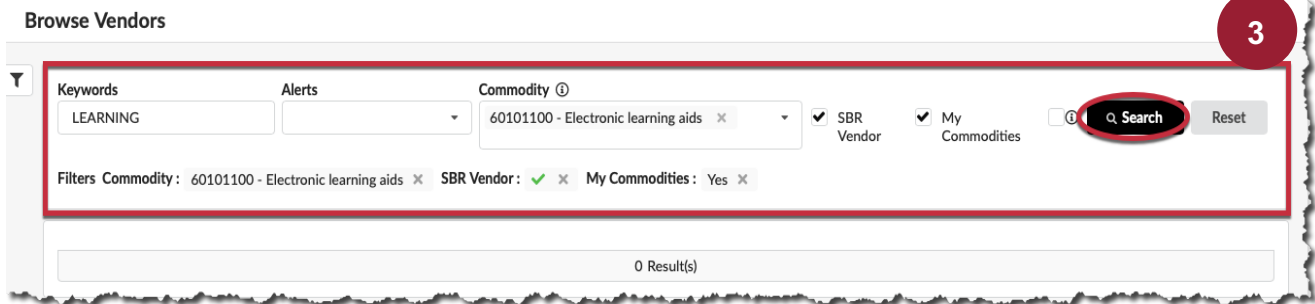
By selecting the **Vendors** step on the left side of the screen, the Project Owner will be able to search for and browse **Consulted Vendors** for the Public Posting Sourcing Project based on identified criteria and requirements.

1. Select the **"Vendors"** step from the menu bar on the left side of the screen.
2. click the **"three-dot"** button to search and select **Vendors** for the Sourcing Project.



**NOTE:** All fields marked with a red asterisk to the right are required and must be completed in order to proceed

3. Enter the necessary vendor search criteria to browse potential options; note the options to include SBR and commodity driven criteria. Click **"Search"** to review the results and select the consulted vendors accordingly. At least one vendor must be selected to publish the Public Posting Sourcing Project.

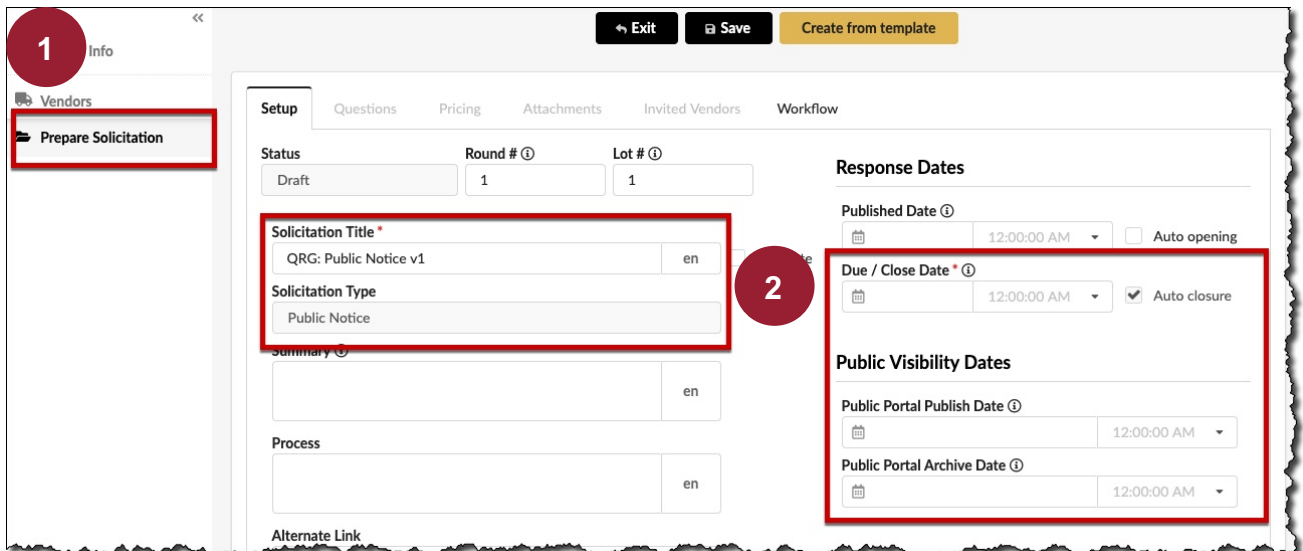


### SECTION 5: Prepare Solicitation - Setup

Utilize the **Prepare Solicitation** step on the left side of the screen in order to define the identified criteria and requirements for the Public Posting Sourcing Project solicitation.

**NOTE:** All fields marked with a red asterisk to the right are required and must be completed in order to proceed

1. Select the “**Prepare Solicitation**” step from the menu bar on the left side of the screen.
2. Enter the required criteria to complete the **Solicitation** form:
  - **Solicitation Title:** Enter an appropriate Solicitation Title for the Sourcing Project
  - **Solicitation Type:** “Public Notice” is defaulted
  - **Due/Close Date:** The date/time when responses can no longer be submitted. NOTE: Due/Close date must be in the future.
  - **Public Portal Publish Date:** The date/time this solicitation will be visible on the public solicitation board. NOTE: the system will automatically set this date EQUAL to the ‘Publish’ date.
  - **Public Portal Archive Date:** The date/time the solicitation will be hidden from the public solicitation board. This is defaulted to five (5) years from “Due/Close” date.

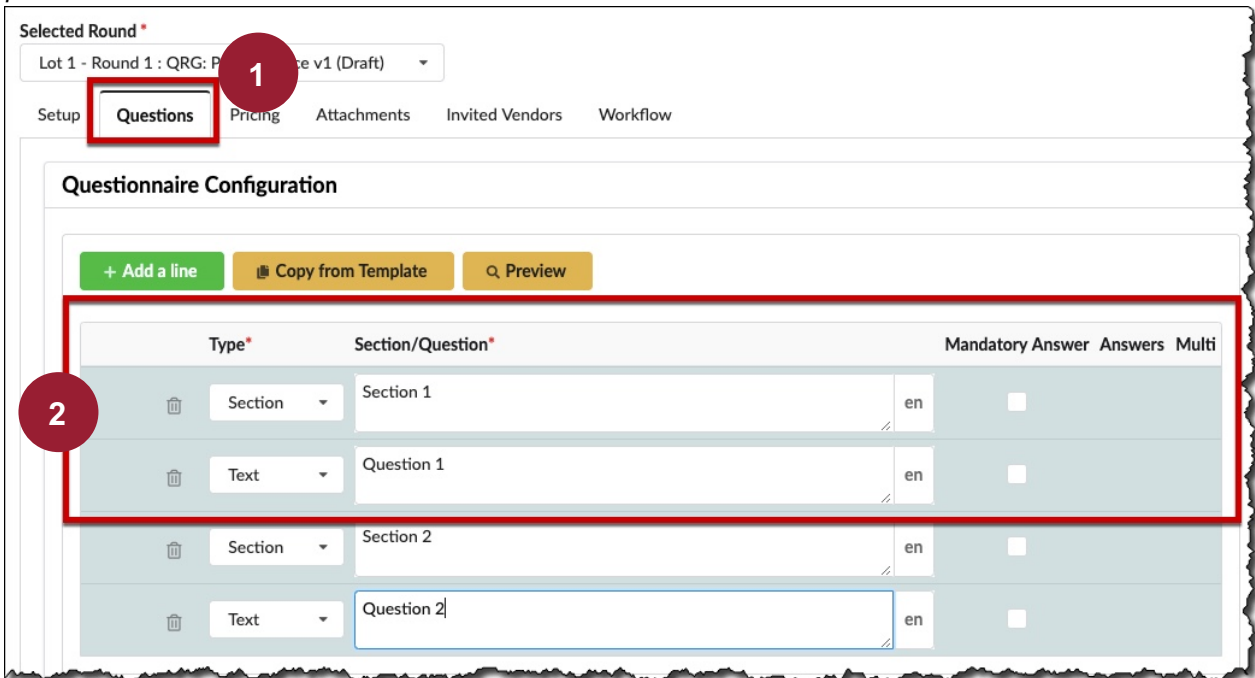


- Once the required criteria is complete, click the “Save” button at the top of the screen

### SECTION 6: Prepare Solicitation – Questions (optional)

1. Within the **Prepare Solicitation** step, select the **Questions** tab from the top of the screen.
2. Create a **“Section”** to categorize a set of Questions. Enter the required Questions as appropriate to each section of the Public Notice solicitation
  - When entering the Questions, ensure to check the **“Question scored”** box to enable the scoring functionality for that line item.

**NOTE:** All fields marked with a red asterisk to the right are required and must be completed in order to proceed



Selected Round \*

Lot 1 - Round 1 : QRG: P... v1 (Draft)

Setup **Questions** Pricing Attachments Invited Vendors Workflow

#### Questionnaire Configuration

+ Add a line Copy from Template Preview

| Type*   | Section/Question* | Mandatory Answer         | Answers | Multi |
|---------|-------------------|--------------------------|---------|-------|
| Section | Section 1         | <input type="checkbox"/> |         |       |
| Text    | Question 1        | <input type="checkbox"/> |         |       |
| Section | Section 2         | <input type="checkbox"/> |         |       |
| Text    | Question 2        | <input type="checkbox"/> |         |       |

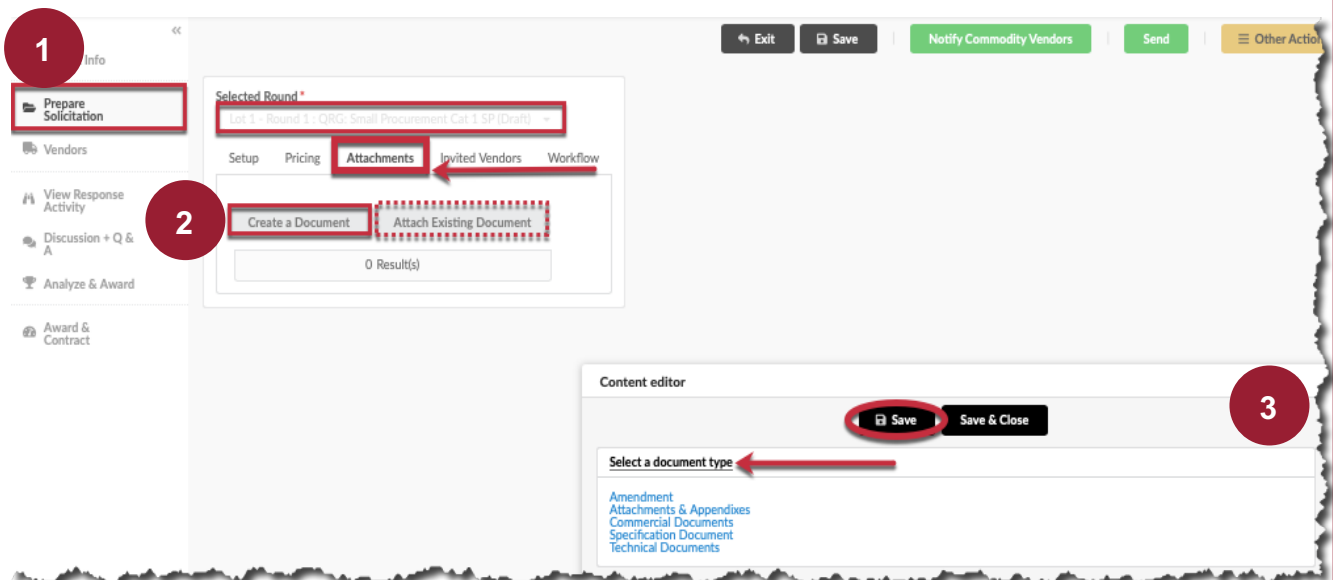
**NOTE:** All questions are required to be housed within a section

- Once the required criteria is complete, click the **“Save”** button at the top of the screen

### SECTION 7: Prepare Solicitation – Attachments (optional)

1. Within the **Prepare Solicitation** step, select the **Attachments** tab from the top of the screen.
  2. **Create a New Document:** Click the “**Create a Document**” button to create a net new Document.
  3. Review the **Content Editor** pop-up window and select the appropriate document type to attach; follow the prompts to upload the document.
- Alternatively **Attach Existing Document:** Click the “**Attach Existing Document**” button to include an attachment from the **Documents** portion of an existing Sourcing Project

**NOTE:** Documents in **DRAFT** status type (as seen in gold) will not be visible to vendors. Documents must be in an **Approved** status type in order to be viewed by vendors. The status type can be edited by clicking the line item pencil icon and selected “Approved” from the Status selection drop-down menu located under “Information”.

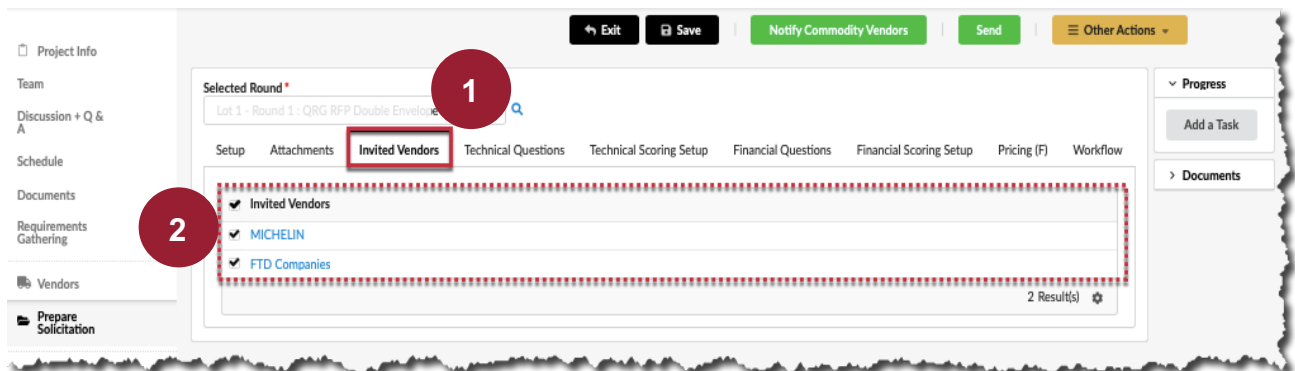


- Once the required criteria is complete, click the “Save” button at the top of the screen

### SECTION 8: Prepare Solicitation – Invited Vendors

1. Within the **Prepare Solicitation** step, select the **Invited Vendors** tab from the top of the screen.
2. Review the **Vendors** as selected within the previous Vendors step (see *Section 9 of this Guide*)
  - Check the box of all Vendor Recipients to receive the Solicitation

**NOTE:** All fields marked with a red asterisk to the right are required and must be completed in order to proceed



The screenshot shows the 'Prepare Solicitation' interface. At the top, there are buttons for 'Exit', 'Save', 'Notify Commodity Vendors', 'Send', and 'Other Actions'. Below these is a 'Selected Round' dropdown menu. The 'Invited Vendors' tab is selected and highlighted with a red box and a red circle with the number 1. Below the tab, a list of vendors is shown with checkboxes: 'Invited Vendors' (checked), 'MICHELIN' (checked), and 'FTD Companies' (checked). The list is enclosed in a red dashed box with a red circle with the number 2. The 'Save' button is visible at the top of the screen.

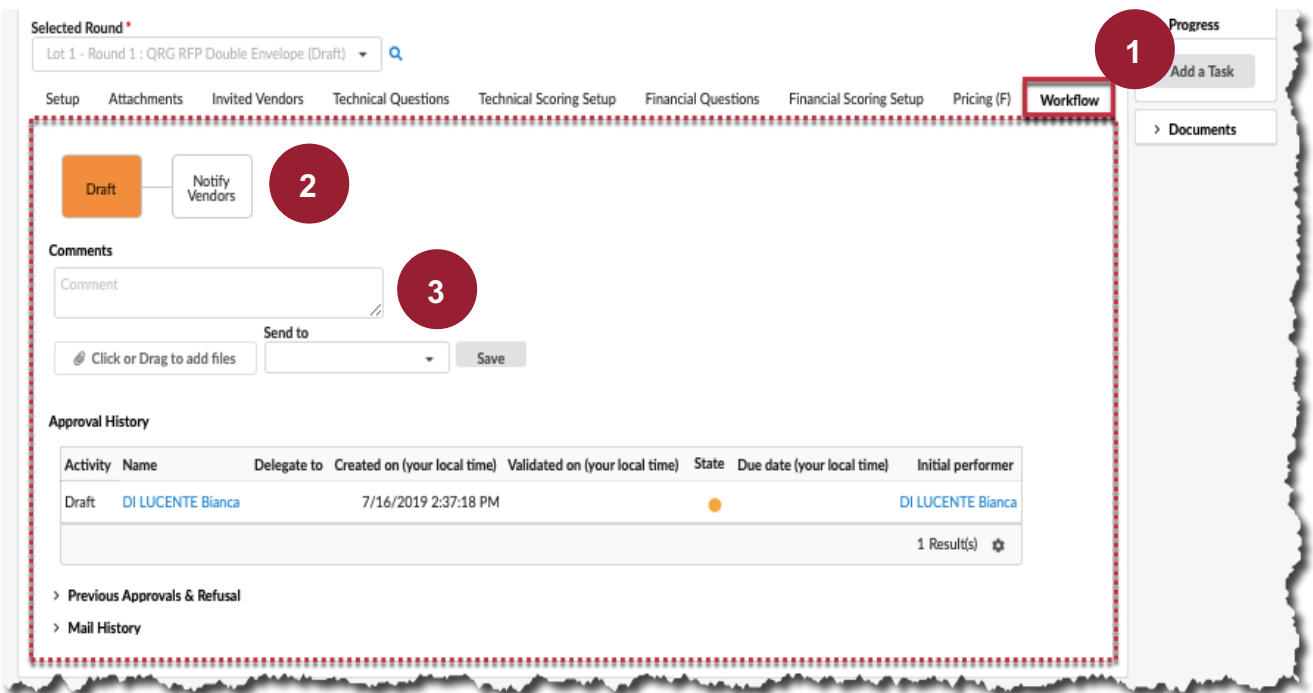
- Once the required criteria is complete, click the “Save” button at the top of the screen



### SECTION 9: Prepare Solicitation – Workflow

1. Within the **Prepare Solicitation** step, select the **Workflow** tab from the top of the screen.
2. Review the **Workflow status**.
3. Enter any final **Comments** or **Documents** specific to the Workflow.

**NOTE:** This portion is optional; there are no required fields to complete



The screenshot shows the 'Workflow' tab selected in the top navigation bar. A red dashed box highlights the main content area. Callout 1 points to the 'Workflow' tab. Callout 2 points to the 'Draft' button. Callout 3 points to the 'Comments' section.

**Workflow Status:**

| Activity | Name              | Delegate to | Created on (your local time) | Validated on (your local time) | State                                 | Due date (your local time) | Initial performer |
|----------|-------------------|-------------|------------------------------|--------------------------------|---------------------------------------|----------------------------|-------------------|
| Draft    | DI LUCENTE Bianca |             | 7/16/2019 2:37:18 PM         |                                | <span style="color: orange;">●</span> |                            | DI LUCENTE Bianca |

1 Result(s) ⚙️

> Previous Approvals & Refusal  
> Mail History

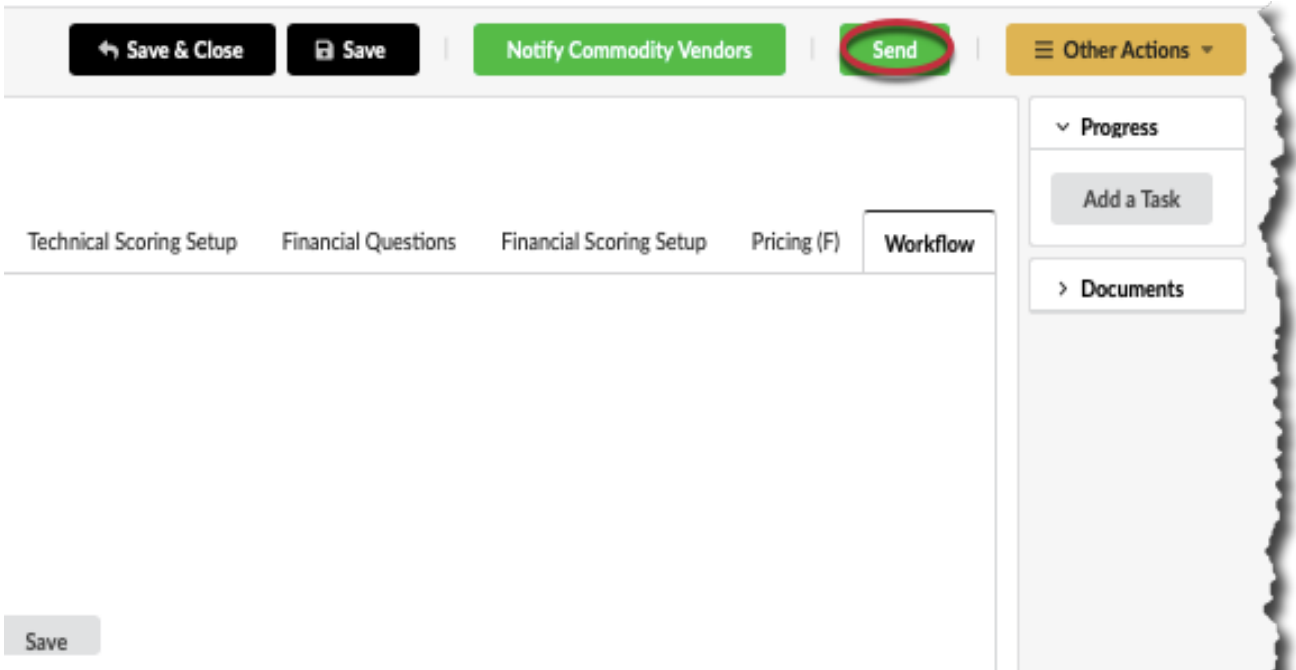
- Once the required criteria is complete, click the “Save” button at the top of the screen

### SECTION 10: Send the Solicitation

1. Within the **Prepare Solicitation** step, select the green “**Send**” button at the top of the screen.

**IMPORTANT:** Click “Send” once only.

**NOTE:** *The solicitation will be made public on the date / time as scheduled within the Project Info step*



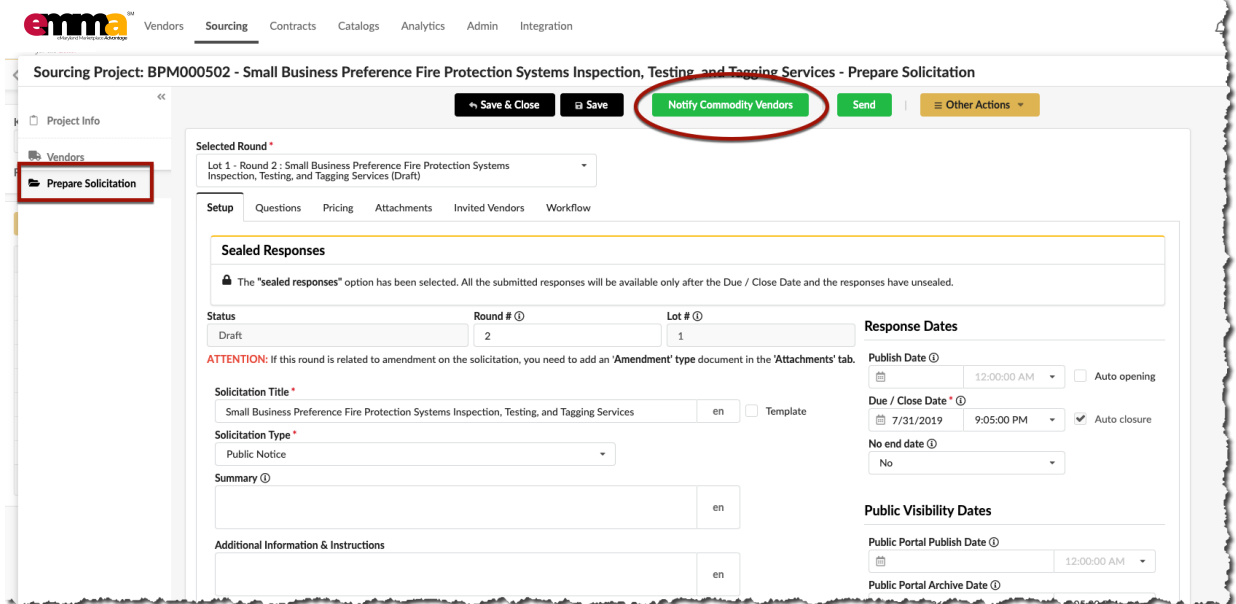
The screenshot shows the 'Prepare Solicitation' interface. At the top, there is a navigation bar with buttons: 'Save & Close', 'Save', 'Notify Commodity Vendors', 'Send' (circled in red), and 'Other Actions'. Below this is a tabbed interface with tabs for 'Technical Scoring Setup', 'Financial Questions', 'Financial Scoring Setup', 'Pricing (F)', and 'Workflow'. The 'Workflow' tab is currently selected. On the right side, there is a sidebar with a 'Progress' section containing an 'Add a Task' button, and a 'Documents' section with a '> Documents' link. A 'Save' button is visible in the bottom left corner of the main content area.

2. Click “Notify Commodity Vendors”.

### SECTION 11: Notify Commodity Vendors

1. Click “Notify Commodity Vendors”.

**- NOTE:** Clicking “Notify Commodity Vendors” will send a notice to all vendors with this solicitation’s specific Commodity codes listed in their profiles. Clicking “Send” will only send to the vendors you have selected under the Vendor tab.

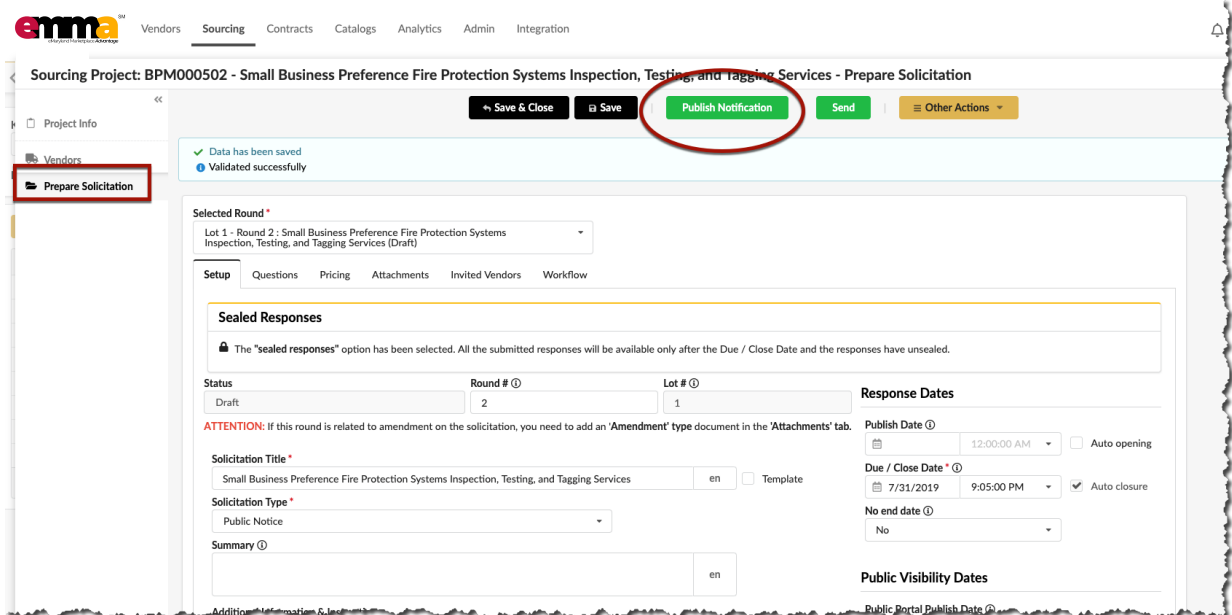


The screenshot displays the eMMA Sourcing Project interface for a project titled "Sourcing Project: BPM000502 - Small Business Preference Fire Protection Systems Inspection, Testing, and Tagging Services - Prepare Solicitation". The interface includes a top navigation bar with the eMMA logo and links to Vendors, Sourcing, Contracts, Catalogs, Analytics, Admin, and Integration. A left sidebar shows a tree view with "Project Info", "Vendors", and "Prepare Solicitation" (highlighted with a red box). The main content area has a top bar with buttons: "Save & Close", "Save", "Notify Commodity Vendors" (circled in red), "Send", and "Other Actions". Below this is a "Selected Round" dropdown menu showing "Lot 1 - Round 2 : Small Business Preference Fire Protection Systems Inspection, Testing, and Tagging Services (Draft)". The "Setup" tab is active, showing a "Sealed Responses" section with a lock icon and a note: "The 'sealed responses' option has been selected. All the submitted responses will be available only after the Due / Close Date and the responses have unsealed." Below this are fields for "Status" (Draft), "Round # ①" (2), and "Lot # ①" (1). An "ATTENTION" note states: "If this round is related to amendment on the solicitation, you need to add an 'Amendment' type document in the 'Attachments' tab." The "Solicitation Title" field contains "Small Business Preference Fire Protection Systems Inspection, Testing, and Tagging Services" with a language dropdown set to "en" and a "Template" checkbox. The "Solicitation Type" dropdown is set to "Public Notice". There are text areas for "Summary ①" and "Additional Information & Instructions", both with language dropdowns set to "en". On the right, the "Response Dates" section includes "Publish Date ①" (12:00:00 AM) with an "Auto opening" checkbox, "Due / Close Date \* ①" (7/31/2019 9:05:00 PM) with an "Auto closure" checkbox, and "No end date ①" (No). The "Public Visibility Dates" section includes "Public Portal Publish Date ①" (12:00:00 AM) and "Public Portal Archive Date ①".

### SECTION 12: Publish Notification

1. Click **"Publish Notification"**.

*This is the final step, and your Solicitation will now be published and sent to selected vendors, as well as vendors matching the commodity codes chose for this Solicitation.*



The screenshot shows the eMMA Sourcing Project interface for "Sourcing Project: BPM000502 - Small Business Preference Fire Protection Systems Inspection, Testing, and Tagging Services - Prepare Solicitation". The "Publish Notification" button is circled in red. The interface includes a sidebar with "Vendors" and "Prepare Solicitation" options. The main content area shows a "Selected Round" dropdown, a "Setup" tab, and a "Sealed Responses" section. The "Status" is "Draft", "Round # 1" is "2", and "Lot # 1" is "1". The "Response Dates" section shows "Publish Date" as "12:00:00 AM" and "Due / Close Date" as "7/31/2019 9:05:00 PM". The "Public Visibility Dates" section shows "Public Portal Publish Date" as "No".