

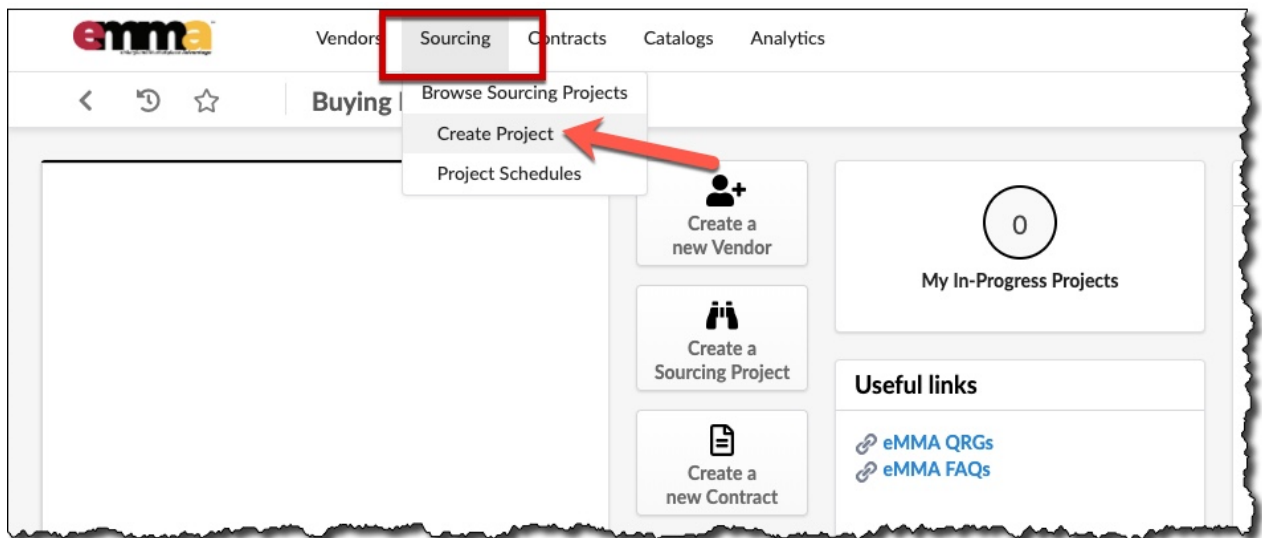
### OVERVIEW

This Quick Reference Guide (QRG) is designed to help you (*Procurement Officers & Buyers*) understand how to create *Small Procurement Category 2 & 3 Sourcing Solicitations* in eMaryland Marketplace Advantage (eMMA).

**Small Procurement Category 2 & 3 Sourcing Solicitations** : A small procurement project type meant for purchases less than \$50,000. This project allows the purchasers to define a project schedule, gather requirements, and store documents. It will also allow for multiple rounds to collect information and/or pricing from invited bidders and award based on **technical and/or financial criteria**.

### 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 **Small Procurement (e.g. Cat 2 & 3)** 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 Small Procurement Category 2 & 3 Sourcing Project
6. **Project Start Date:** Enter the Project Start date

General Information

Alternate ID ⓘ	eMM Solicitation #	<input type="checkbox"/> Is a template
<input type="text"/>	<input type="text"/>	
Project Type	Project Start Date *	Status
Small Procurement (e.g. Cat 2 & 3)	<input type="text" value="8/31/20"/>	In progress ▾
Project Title *	Project End Date	<input type="checkbox"/> Confidential Sourcing Project
QRG: Small Procurement Cat 2 + 3	<input type="text"/>	
Main Category *	Other Commodities	
86000000 - Education and Training Services ▾	<input type="text"/>	
Issuing Agency *	Other Organizations	
Motor Vehicle Administration (J04) ▾	<input type="text"/>	
Procurement Officer / Buyer *		
Bianca DI LUCENTE ▾		

➤ 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

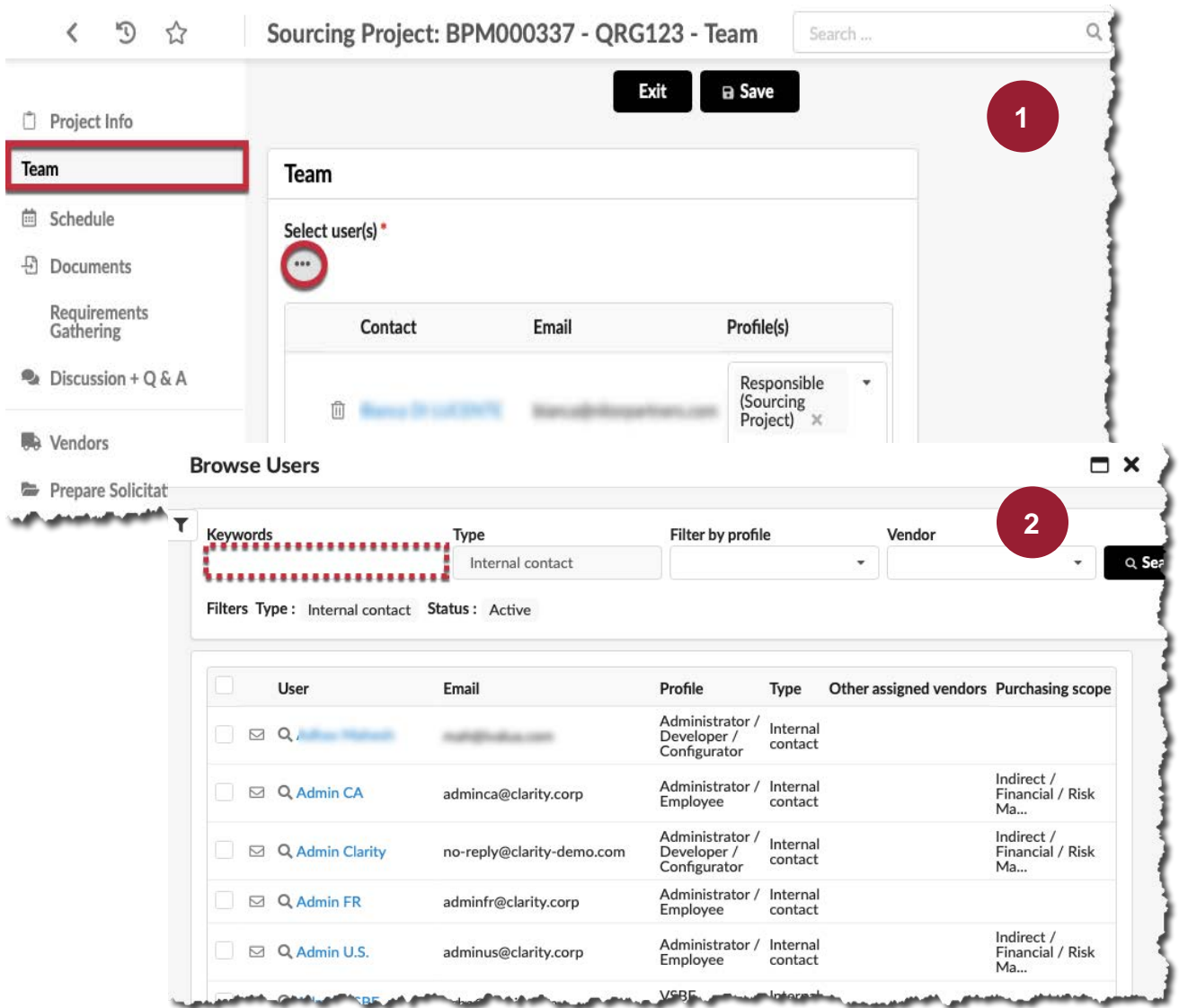
<b>Federal Funding *</b>	<b>SBR Designation *</b>	<b>Project Estimate</b> ⓘ	<b>Project Cost Class</b>
No ▼	No ▼		▼
<b>MBE Goal? *</b>	<b>MBE Participation (%)</b>		
Yes ▼	25		
<input type="checkbox"/> MBE Sub-Goal? ⓘ			
<b>VSBE Goal? *</b>	<b>VSBE Participation (%)</b>		
Yes ▼	25		

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

### SECTION 4: Create a Team

The Owner of the Sourcing Project may choose to create a **Team** for the specific event to drive transparency and collaboration through out the process.

1. Select the “**Team**” step from the menu bar on the left side of the screen; click the “**three-dot**” button to add team members.
2. Scroll the pop-up to browse and identify desired team members or use the text box” to search for a specific individual; select and close out of the screen.



The screenshot shows the 'Sourcing Project: BPM000337 - QRG123 - Team' interface. On the left, the 'Team' step is selected in the menu bar. The main area shows a 'Team' section with a 'Select user(s)' button (indicated by a red circle and the number 1). Below this is a table with columns: Contact, Email, Profile(s), and Responsible (Sourcing Project). A 'Browse Users' pop-up window is open, showing a search bar (indicated by a red dashed box and the number 2) and a table of users.

**Browse Users**

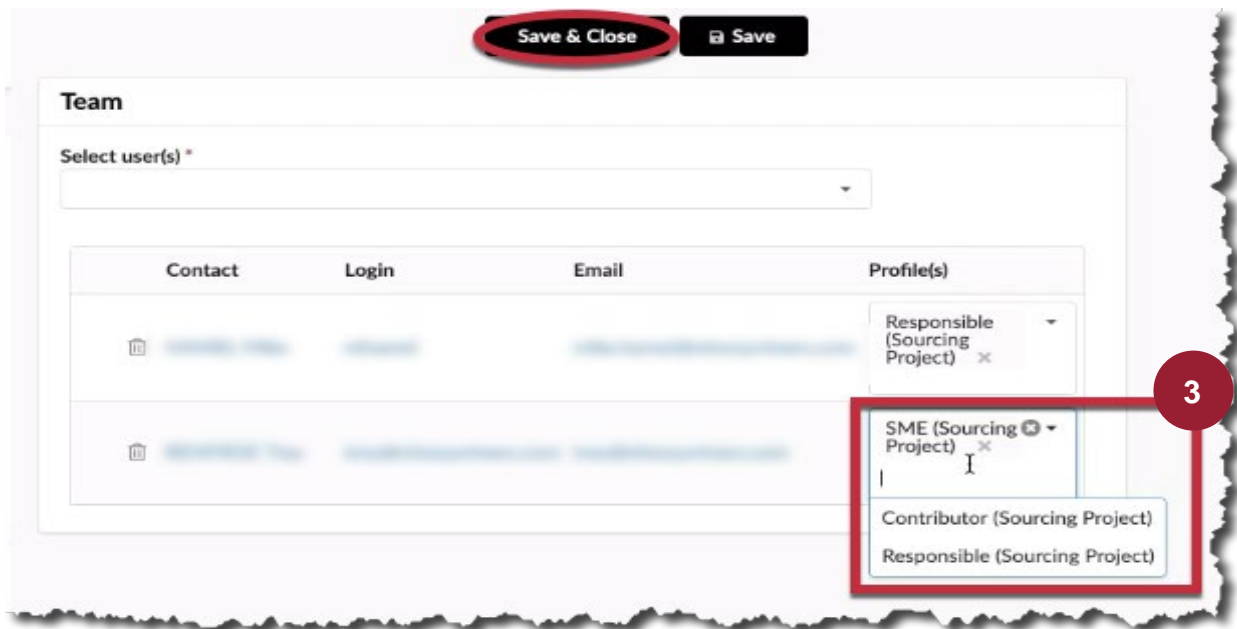
Keywords: [Red dashed box] Type: Internal contact Filter by profile: [Dropdown] Vendor: [Dropdown] Q Search

Filters Type: Internal contact Status: Active

User	Email	Profile	Type	Other assigned vendors	Purchasing scope
<input type="checkbox"/> Admin		Administrator / Developer / Configurator	Internal contact		
<input type="checkbox"/> Admin CA	adminca@clarity.corp	Administrator / Employee	Internal contact		Indirect / Financial / Risk Ma...
<input type="checkbox"/> Admin Clarity	no-reply@clarity-demo.com	Administrator / Developer / Configurator	Internal contact		Indirect / Financial / Risk Ma...
<input type="checkbox"/> Admin FR	adminfr@clarity.corp	Administrator / Employee	Internal contact		
<input type="checkbox"/> Admin U.S.	adminus@clarity.corp	Administrator / Employee	Internal contact		Indirect / Financial / Risk Ma...



#### SECTION 4: Create a Team (cont.)

3. After the team member/s are added; select their role as either a **SME (Subject Matter Expert)**, **Contributor** or **Responsible** profile:
  - **SME:** *The SME acts with the authorization of hands on active “helper” role; note this is the default team role when a new member is selected*
  - **Contributor:** *The role of Contributor is that of a “watcher” whom will score and respond to solicitations*
  - **Responsible:** *The Responsible role is appropriate for the owner of the Sourcing Project*



Team

Select user(s) \*

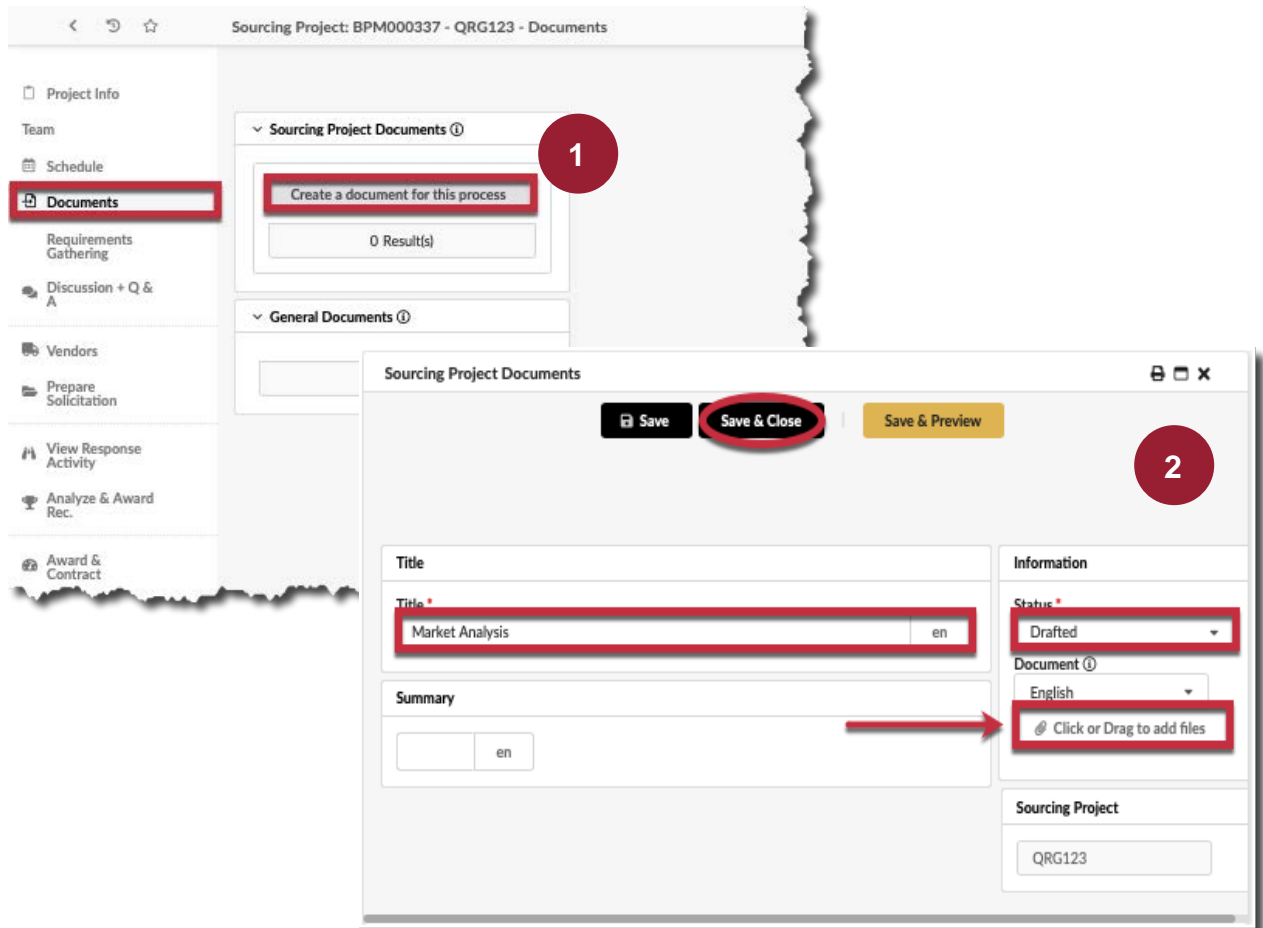
Contact	Login	Email	Profile(s)
 [blurred]	[blurred]	[blurred]	Responsible (Sourcing Project) x
 [blurred]	[blurred]	[blurred]	SME (Sourcing Project) x Contributor (Sourcing Project) Responsible (Sourcing Project)

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

### SECTION 5: Add Documents

To add **Documents** to the Sourcing Project select the step on the left side of the screen:

1. Click the “**Crate a document for this process**” button to add a document to the Sourcing Project.



Sourcing Project: BPM000337 - QRG123 - Documents

Project Info

Team

Schedule

**Documents**

Requirements Gathering

Discussion + Q & A

Vendors

Prepare Solicitation

View Response Activity

Analyze & Award Rec.

Award & Contract

Sourcing Project Documents

0 Results(s)

General Documents

Sourcing Project Documents

Save Save & Close Save & Preview

Title

Title \*

Market Analysis en

Summary

en

Information

Status \*

Drafted

Document

English

Click or Drag to add files

Sourcing Project

QRG123

2. Within the pop-up window, complete all required fields as marked with the red asterisk and click or drag the desired file for upload where indicated by the arrow.

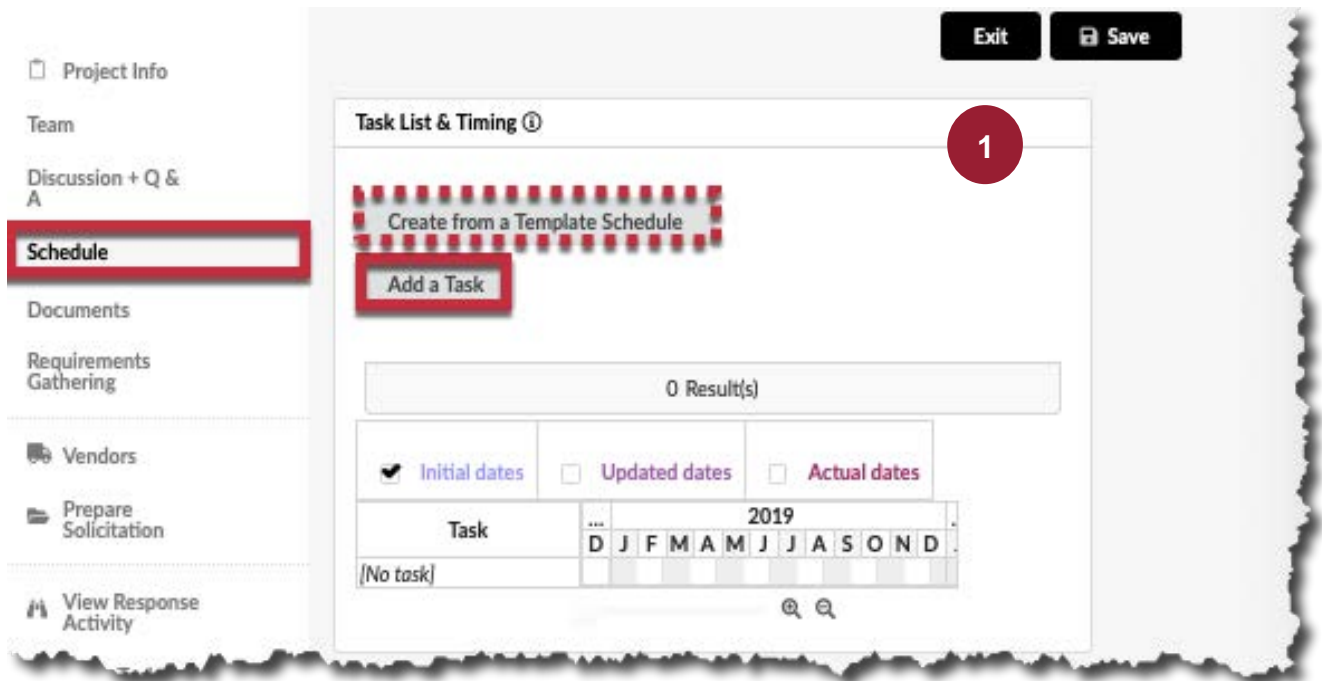
- Click the “**Save & Close**” button at the top of the screen to incorporate all edits and return to the **Documents** home screen

**NOTE:** The Documents added to this section are only visible by the internal team to the Sourcing Project. This is an appropriate place to store such items as market analysis, research etc. These documents can be copied to the solicitation and shared with vendors if desired.

### SECTION 6: Create a Sourcing Project Schedule

Access the Sourcing Project **Schedule** features by selecting the indicated step on the left side of the screen

1. Click the “**Add a Task**” button to begin populating the Schedule Task List and Timing activities.
  - Alternatively, a template schedule can be imported from past Sourcing Solicitations by clicking the “**Create from a Template Schedule**” button



**NOTE:** The criteria defined within the **Task List & Timing** table will auto-populate the “**Initial Dates**” section of the GANTT chart as illustrated below

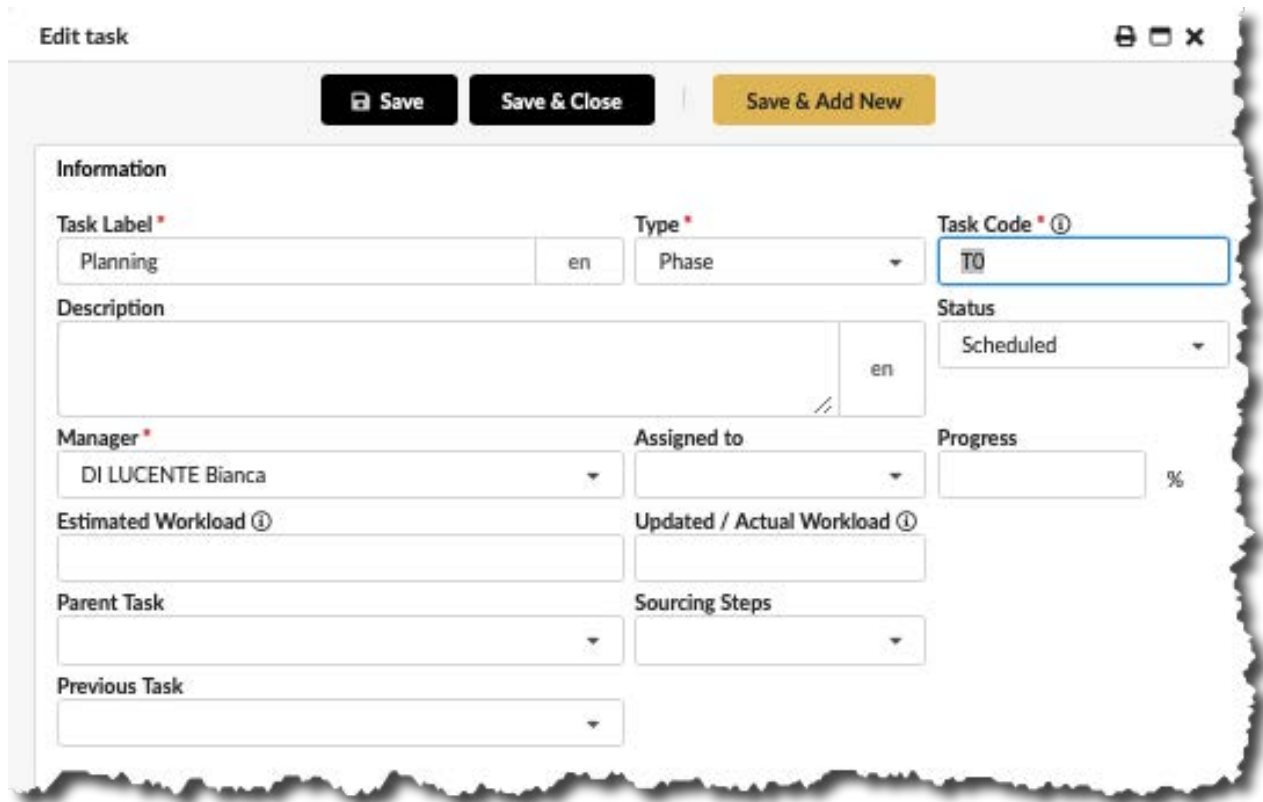


### SECTION 6: Create a Sourcing Project Schedule – Add a Task

Within the Edit Task pop-up window enter the Task Information:

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

- **Task Label:** From the drop-down menu select the appropriate Task Label
- **Type:** Select the Task Type from the drop-down menu which corresponds with the label
- **Task Code:** The Task Code will auto-populate; this field does not require editing
- **Manager:** Enter the Sourcing Project Manager's Name
- **Assigned To:** The Assigned To field allocates the task to the responsible team member for completion



- Once the required criteria is complete, click the “Save” button at the top of the screen or to continue adding tasks to populate the Project Schedule click “Save & Add New”



### SECTION 6: Create a Sourcing Project Schedule – Editing Tasks (cont.)

To edit the Task line click the **pencil icon**;



2 Meeting Initial Planning Meeting Mike HAMEL [Calendar Icon] [Calendar Icon] Scheduled %

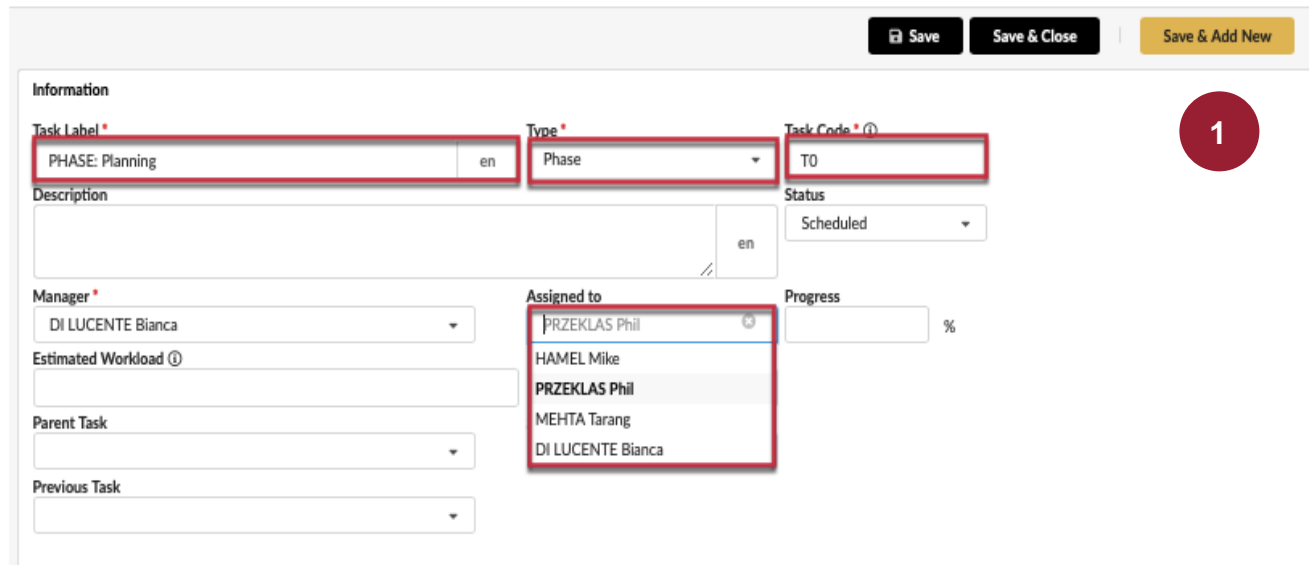
**NOTE:** All fields marked with a red asterisk to the right are required and must be completed in order to proceed

1. Review the **Task Information** fields:

- Task Label:** Enter a clear and concise Task Label; additional details may be captured in the **Description** box
- Type:** Select the appropriate option from the drop-down menu (ex. Phase, Meeting, Action)
- Task Code:** This field is system generated
- Manager:** The Manager will default to the Sourcing Project Manager

**NOTE:** Tasks may only be **assigned** to internal team members as established within the “**Team**” step of the Sourcing Project

Edit task



Save Save & Close Save & Add New

**Information**

Task Label\* PHASE: Planning en

Type\* Phase

Task Code\* (i) T0

Description en

Status Scheduled

Manager\* DI LUCENTE Bianca

Assigned to PRZEKLAS Phil HAMEL Mike PRZEKLAS Phil MEHTA Tarang DI LUCENTE Bianca

Progress %

Estimated Workload (i)

Parent Task

Previous Task

1

### SECTION 6: Create a Sourcing Project Schedule – Editing Tasks (cont.)

2. Review the **Date Management** fields:
  - **Begin Date Initial Start Date**
  - **End Date Initial Start Date**
  - **Updated Dates:** *This field is to be updated in the future should the initial dates need revised*
  - **Actual Dates:** *This field is to capture the actual “true” dates*

#### Dates Management

	Begin date Initial Start Date *	End date Initial End Date *	Duration (days) Duration
Initial	<input type="text" value="7/15/20"/>	<input type="text" value="7/26/20"/>	<input type="text" value="11"/>
Updated	<input type="text"/>	<input type="text"/>	<input type="text"/>
Actual	<input type="text"/>	<input type="text"/>	<input type="text"/>

#### Comments

Click or Drag to add files
Save

3. Review the **Sub Tasks** for the specified line item located at the bottom of the *Task Editing pop-up screen*.

Type	Description
Meeting	Identify what you want to procure.
Action	Prepare specifications and determine the means for advertising and distributing the solicitation. Develop a direct solicitation list. Hold PRG, set MBE and VSBE goals and MBE subgoals, as appropriate. Work with AAG as needed. Obtain internal agency approvals. (Program, AAG, etc.)

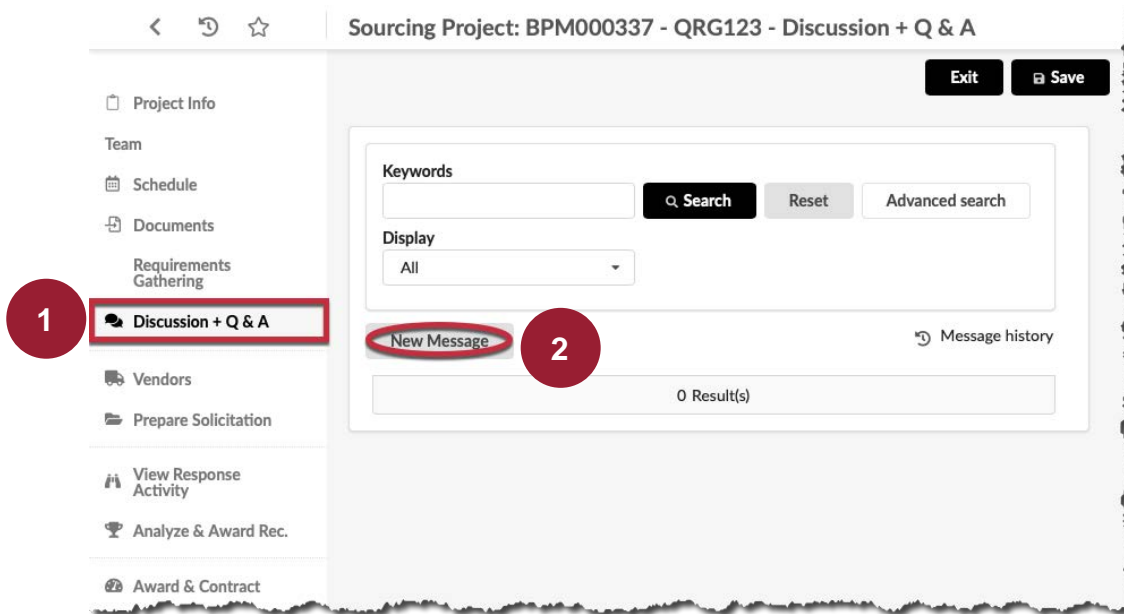
- Click the **“Save & Close”** button at the top of the screen to incorporate all edits and return to the **Schedule** home screen



### SECTION 7: Discussion + Q & A

The eMMA Sourcing module allows for streamlined central point of collaboration amongst internal teams within the Sourcing Project via the **Discussion + Q & A** step.

1. Select the “**Discussion + Q & A**” step from the menu bar on the left side of the screen.
2. Click the “**New Message**” button to initiate a new message.

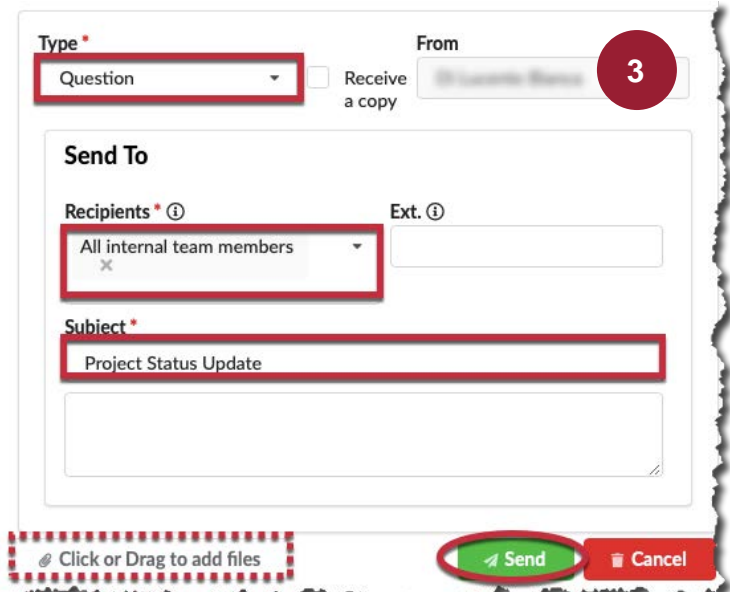


The screenshot shows the eMMA Sourcing Project interface for project BPM000337 - QRG123. The left sidebar contains a menu with options: Project Info, Team, Schedule, Documents, Requirements Gathering, **Discussion + Q & A** (highlighted with a red box and a red circle with the number 1), Vendors, Prepare Solicitation, View Response Activity, Analyze & Award Rec., and Award & Contract. The main content area shows a search bar with 'Keywords', a 'Search' button, a 'Reset' button, and an 'Advanced search' button. Below the search bar is a 'Display' dropdown menu set to 'All'. A 'New Message' button is highlighted with a red box and a red circle with the number 2. To the right of the 'New Message' button is a 'Message history' link. At the bottom of the main content area, it says '0 Result(s)'.

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

3. Enter the required information; select the internal recipients of the message, craft the message and click “**Send**”.
- **Recipients:** A message can be sent to a user outside of the system by entering an email address into the Recipient text box
  - **TIP:** Once the solicitation is live / active; the Discussion + Q & A may be utilized to communicate with vendors as well

**OPTIONAL:** Files may be attached by clicking or dragging where indicated in the lower left corner\*



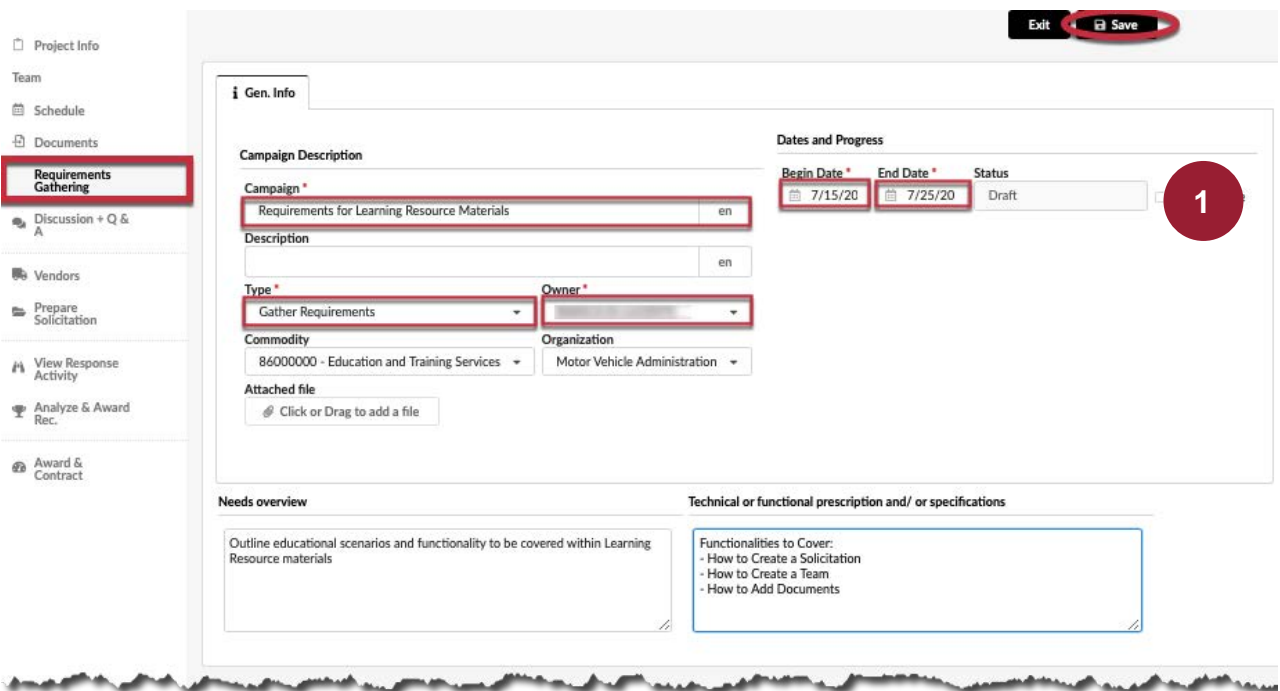
The screenshot shows the 'Send To' form in the eMMA Sourcing Project interface. The form has a 'Type' dropdown menu set to 'Question' (highlighted with a red box and a red circle with the number 3). To the right of the 'Type' dropdown is a 'From' dropdown menu set to 'Discussion + Q & A'. Below the 'Type' dropdown is a 'Receive a copy' checkbox. The 'Send To' section has a 'Recipients' dropdown menu set to 'All internal team members' (highlighted with a red box). To the right of the 'Recipients' dropdown is an 'Ext.' text box. Below the 'Recipients' dropdown is a 'Subject' text box set to 'Project Status Update' (highlighted with a red box). At the bottom of the form is a dashed red box with the text 'Click or Drag to add files'. To the right of this box are two buttons: 'Send' (highlighted with a red box and a red circle with the number 3) and 'Cancel'.

### SECTION 8: Requirements Gathering

**Requirements Gathering** acts as a tool to create an internal questionnaire pertaining to the needs and criteria of the Sourcing Project. Typically the Requirements Gathering questionnaire would be targeted towards internal stakeholders such as the team SME's or Contributors.

1. To add **Requirements Gathering** to the Sourcing Project select the step on the left side of the screen and complete the required fields.

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



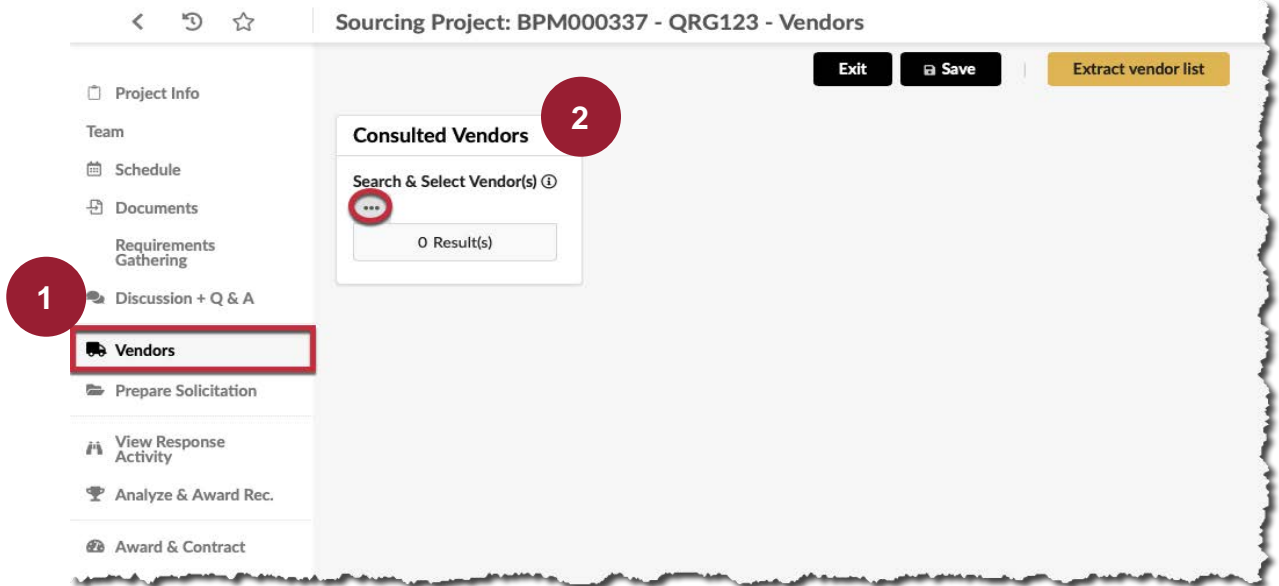
The screenshot shows the eMMA interface for creating a Requirements Gathering questionnaire. On the left, a sidebar lists various project steps, with 'Requirements Gathering' highlighted. The main content area is divided into two tabs: 'Gen. Info' and 'Dates and Progress'. The 'Gen. Info' tab contains several required fields (marked with a red asterisk): 'Campaign', 'Description', 'Type', 'Owner', 'Commodity', and 'Organization'. The 'Dates and Progress' tab contains 'Begin Date', 'End Date', and 'Status'. A red circle with the number 1 is placed over the 'Save' button at the top right of the form.

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

### SECTION 9: Select Vendors

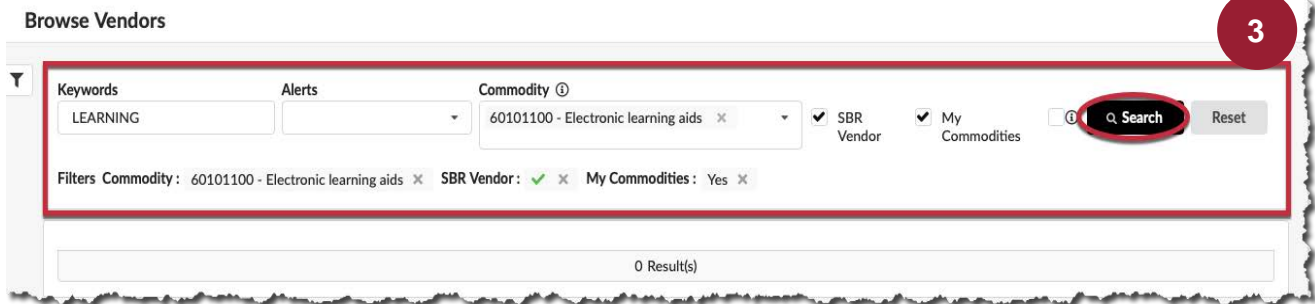
By selecting the **Vendors** step on the left side of the screen, the Project Owner will be able to search for and browse **Consulted Vendors** for the Small Procurement Category 2 + 3 Sourcing Project based on identified criteria and requirements.

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 Small Procurement Category 2 + 3 Sourcing Project.

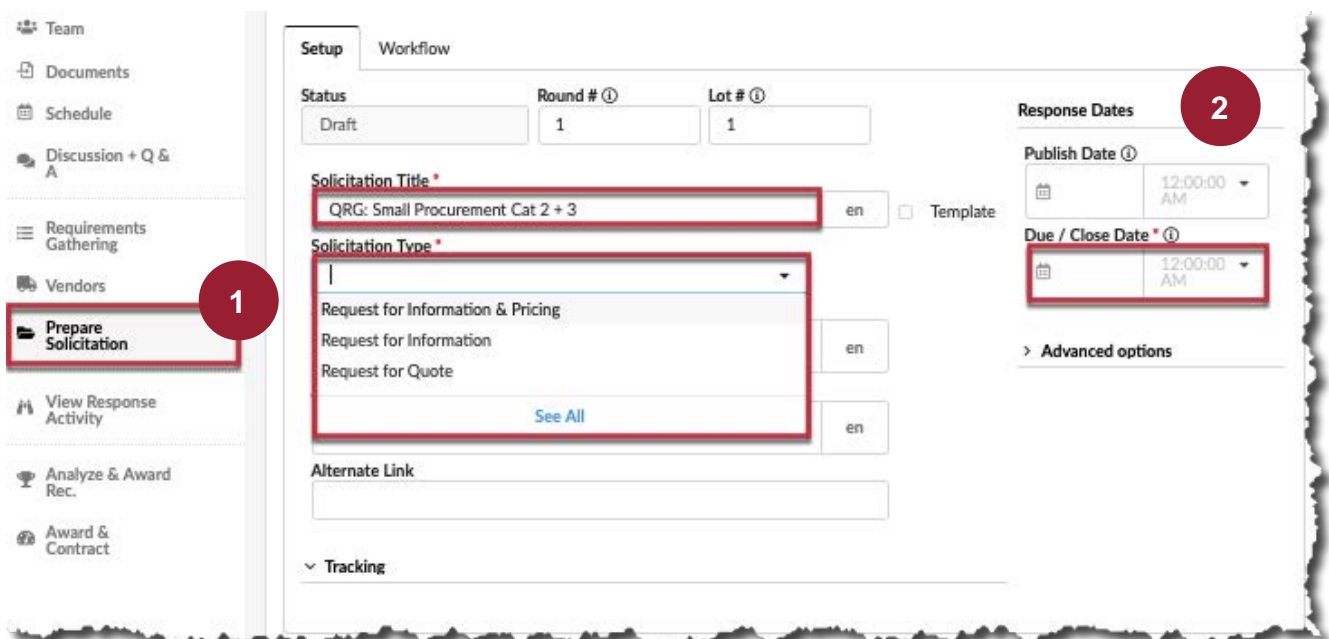


### SECTION 10: Prepare Solicitation - Setup

Utilize the **Prepare Solicitation** step on the left side of the screen in order to define the identified criteria and requirements for the Small Procurement Category 2 + 3 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:** Select the required type from the drop-down menu
  - **Due / Close Date:** Enter the date when Bidders/Vendors when can no longer submit responses.



**NOTE:** Solicitations under **Small Procurement Cat 2&3** are not automatically defaulted to be available on the public portal. To make the solicitation available on the public portal:

- i. Click “Advanced Options” (shown above) and put a checkmark in “Solicitation Visible to Public”.
- ii. Click Save.

Enter the public visibility dates in the pop-up window. NOTE: These dates will default based on the **Open Date**, and Archive Date will be set for seven (7) years from the **Due/Close** date.

NOTE: If your solicitation is already open, you will need to create an Amendment, follow the steps above, and re-publish your solicitation.

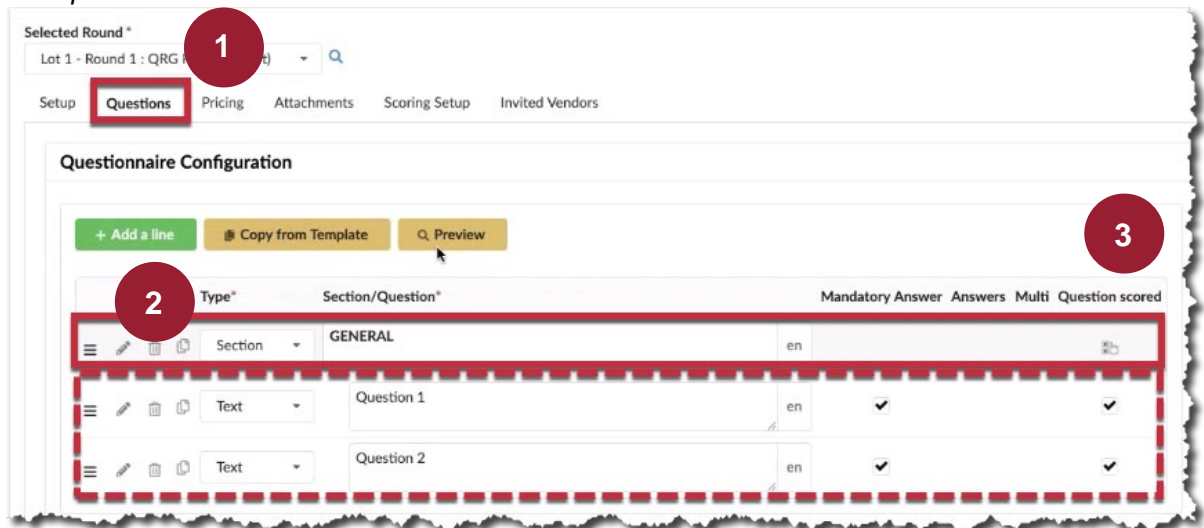
➤ Once the required criteria is complete, click the “Save” button at the top of the screen



### SECTION 10: Prepare Solicitation - Questions and Pricing

1. Within the **Prepare Solicitation** step, select the **Questions** tab from the top of the screen. (If you wish to add questions that will be scored. This is an optional section.)
2. Create a **"Section"** to categorize a set of Questions.
3. Enter the required Questions as appropriate to each section of the Small Procurement Category 2 + 3 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. All questions must be housed within a section.



Selected Round \*  
Lot 1 - Round 1 : QRG

Setup **Questions** Pricing Attachments Scoring Setup Invited Vendors

Questionnaire Configuration

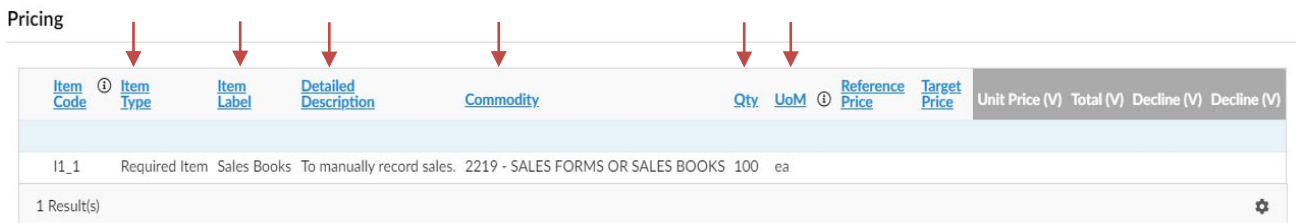
+ Add a line Copy from Template Preview

Type*	Section/Question*	Mandatory Answer	Answers	Multi	Question scored
Section	GENERAL	en			
Text	Question 1	en	✓		✓
Text	Question 2	en	✓		✓

1. **Next**, select the **Pricing** tab to the right of the Questions tab. **THIS MUST BE COMPLETED** to allow vendors to submit pricing to your solicitation!
2. You can generally skip creating a pricing grid in MS Excel due to smaller nature of a Cat 2 & 3.
3. In the Pricing section, select the **Item Type** in the drop down, (usually a Required Item), add a short description in the **Detailed Description** field, select the **Commodity** code, type in the quantity in the **Qty** field, and name the unit of measure from the **UoM** field. *Reference Price and Target Price are optional.*

**NOTE:** The *Item Code* field is automatically generated and does not need to be changed.

Pricing



Item Code	Item Type	Item Label	Detailed Description	Commodity	Qty	UoM	Reference Price	Target Price	Unit Price (V)	Total (V)	Decline (V)	Decline (V)
I1_1	Required Item	Sales Books	To manually record sales.	2219 - SALES FORMS OR SALES BOOKS	100	ea						

1 Result(s)

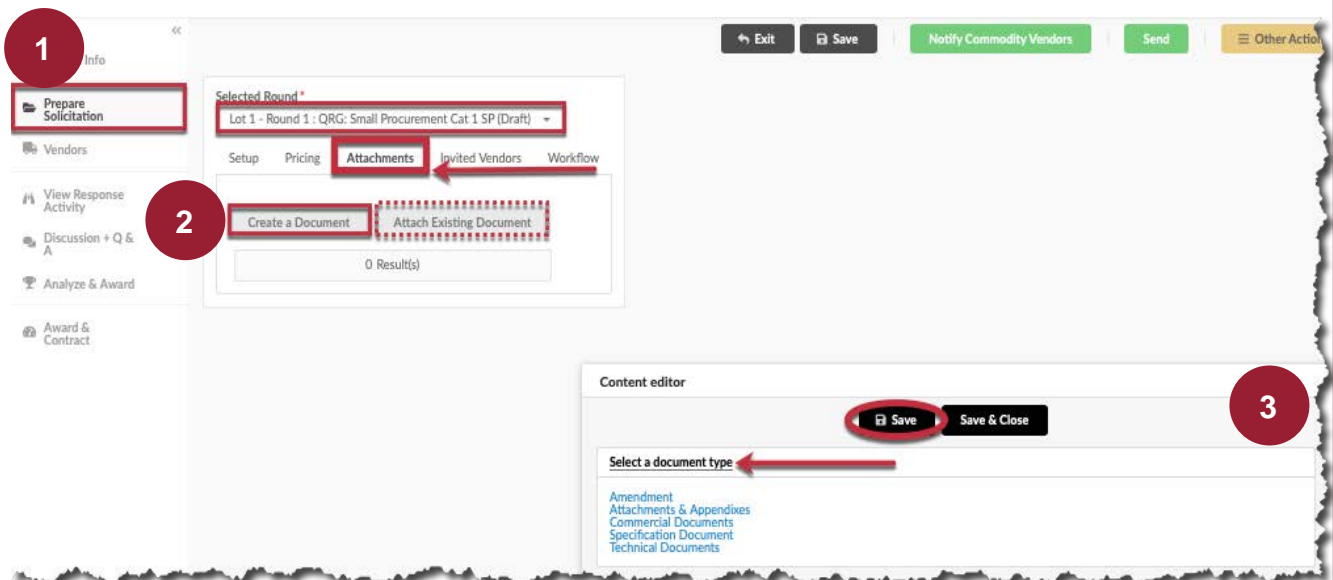
- Once the required criteria is complete, click the **"Save"** button at the top of the screen



### SECTION 10: Prepare Solicitation - Attachments

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”.

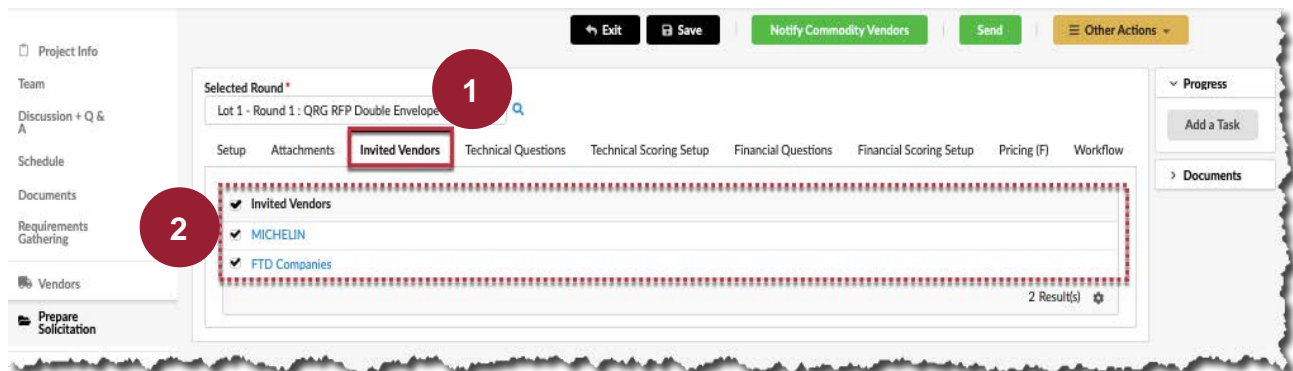


- Once the required criteria is complete, click the “Save” button at the top of the screen

### SECTION 10: 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



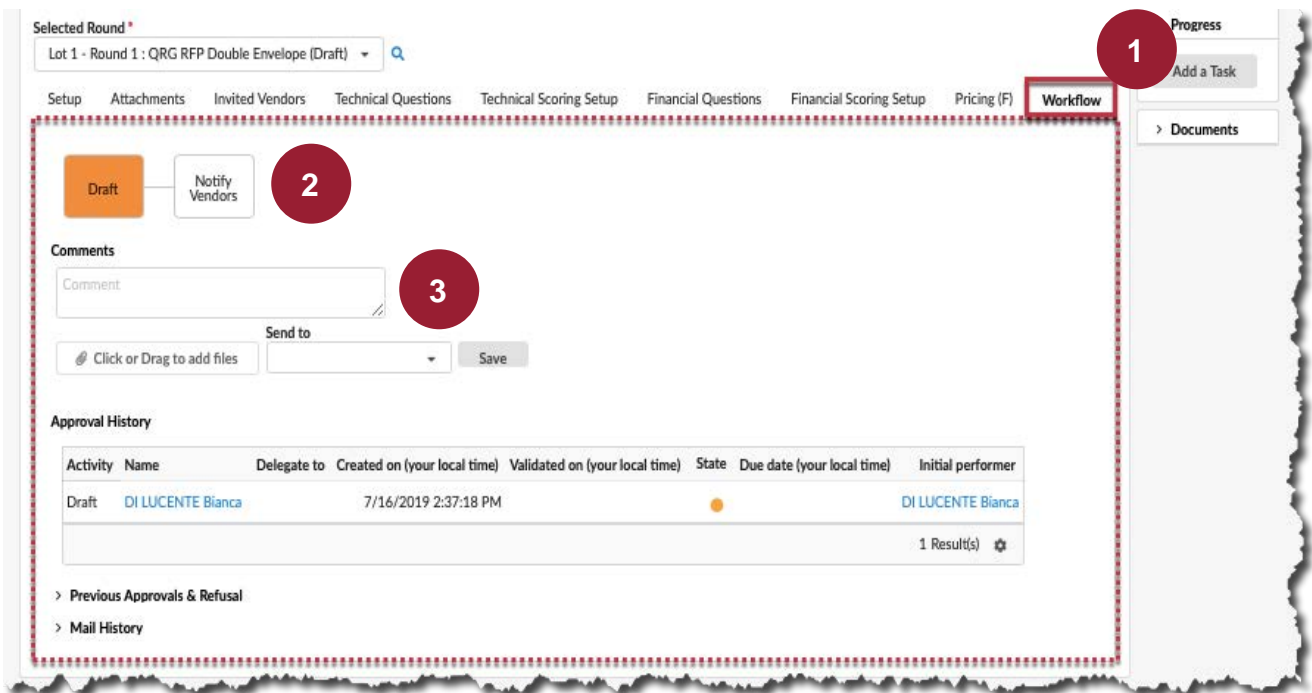
The screenshot displays the 'Prepare Solicitation' interface. On the left sidebar, the 'Vendors' section is expanded, and 'Prepare Solicitation' is selected. The main content area shows the 'Invited Vendors' tab, which lists two vendors: MICHELIN and FTD Companies. A red dashed box highlights the vendor list, and a red circle with the number 1 highlights the 'Invited Vendors' tab. A red circle with the number 2 highlights the 'Vendors' section in the sidebar. At the top right, there are buttons for Exit, Save, Notify Commodity Vendors, Send, and Other Actions.

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

### SECTION 10: 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 (callout 1). The main content area includes a 'Draft' button (callout 2) and a 'Notify Vendors' button. Below these is a 'Comments' section with a text input field (callout 3) and a 'Send to' dropdown menu. At the bottom of the main area is an 'Approval History' table. On the right side, there is a 'Progress' section with 'Add a Task' and 'Documents' buttons.

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

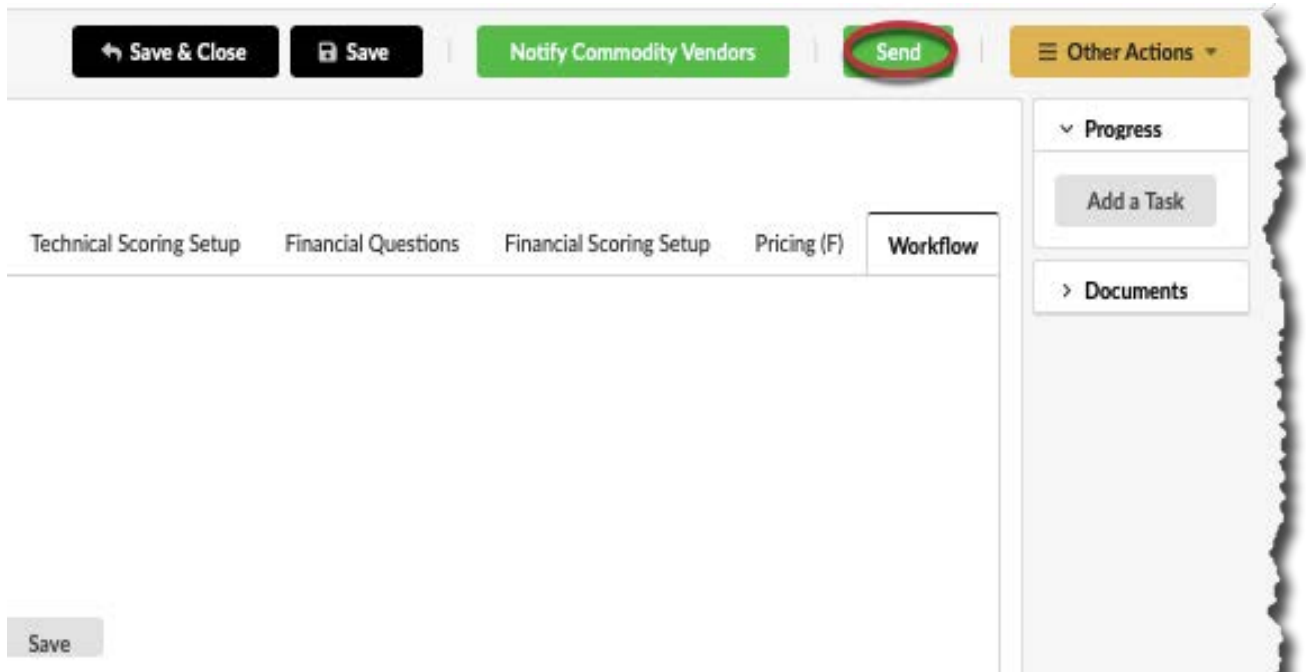
- Once the required criteria is complete, click the “Save” button at the top of the screen

### SECTION 11: 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.

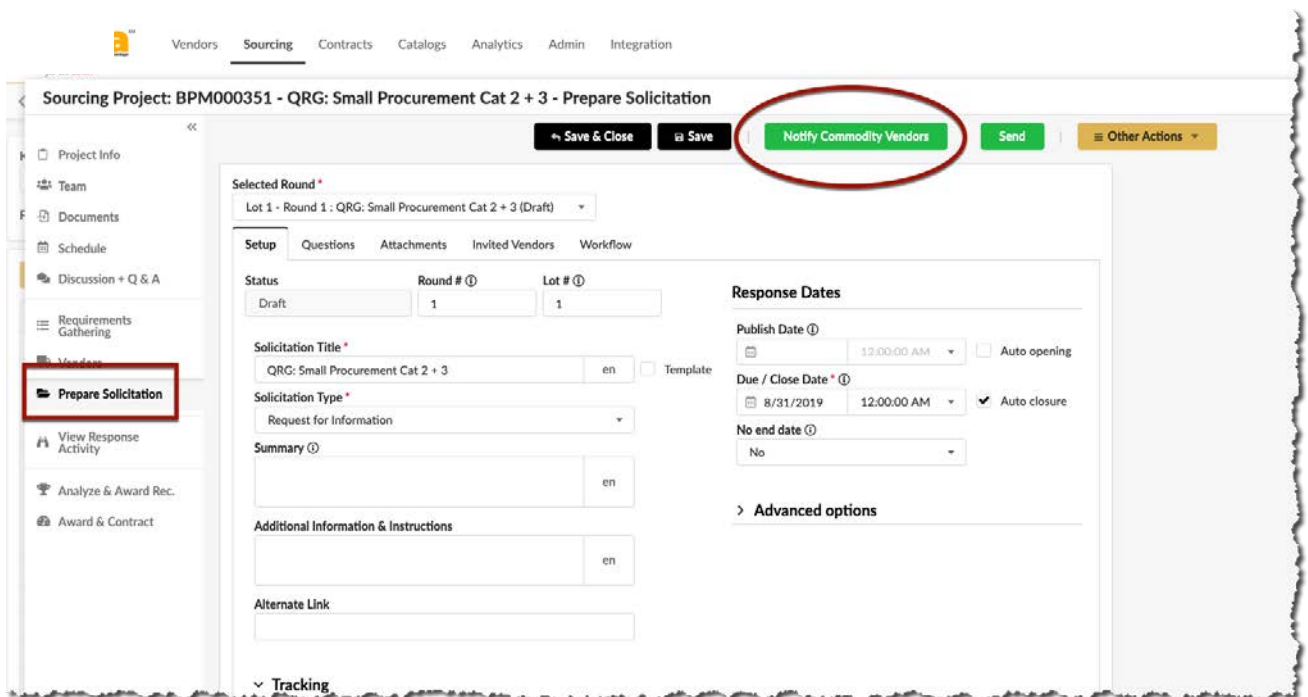
**NOTE:** *The solicitation will be made public on the date / time as scheduled within the Project Info step*



### SECTION 12: 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.

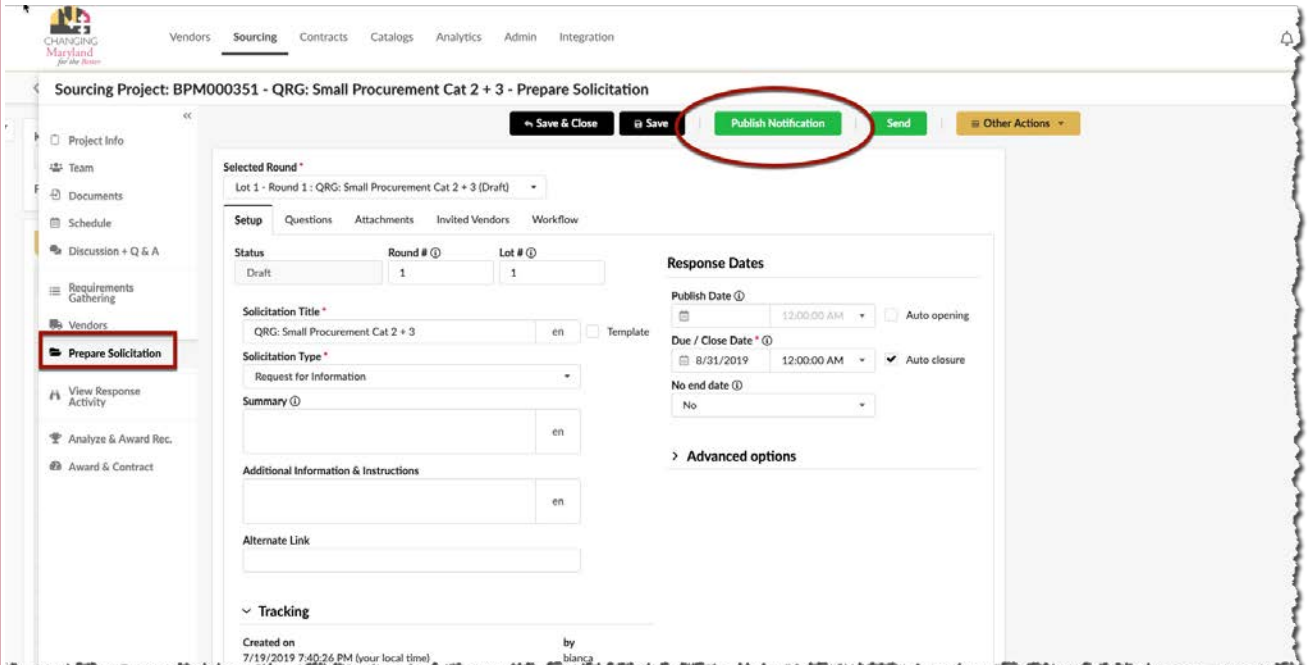


The screenshot displays the eMMA Sourcing Project interface for "Sourcing Project: BPM000351 - QRG: Small Procurement Cat 2 + 3 - Prepare Solicitation". The interface includes a top navigation bar with tabs: Vendors, Sourcing, Contracts, Catalogs, Analytics, Admin, and Integration. The "Sourcing" tab is active. On the left sidebar, the "Vendors" section is expanded, and the "Prepare Solicitation" option is highlighted with a red box. The main content area shows the "Setup" tab for "Lot 1 - Round 1 : QRG: Small Procurement Cat 2 + 3 (Draft)". The "Notify Commodity Vendors" button is circled in red. Other buttons visible include "Save & Close", "Save", "Send", and "Other Actions". The form fields include "Status" (Draft), "Round # 1" (1), "Lot # 1" (1), "Solicitation Title" (QRG: Small Procurement Cat 2 + 3), "Solicitation Type" (Request for Information), "Summary" (en), "Additional Information & Instructions" (en), and "Alternate Link". The "Response Dates" section shows "Publish Date" (12:00:00 AM), "Due / Close Date" (8/31/2019 12:00:00 AM), and "No end date" (No). The "Advanced options" section is also visible.

### SECTION 13: 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: BPM000351 - QRG: Small Procurement Cat 2 + 3 - Prepare Solicitation". The "Publish Notification" button is highlighted with a red circle. The interface includes a sidebar with navigation options like Project Info, Team, Documents, Schedule, Discussion + Q & A, Requirements Gathering, Vendors, Prepare Solicitation (highlighted), View Response Activity, Analyze & Award Rec., and Award & Contract. The main content area shows the "Selected Round" as "Lot 1 - Round 1: QRG: Small Procurement Cat 2 + 3 (Draft)". The "Setup" tab is active, displaying fields for Status (Draft), Round # (1), Lot # (1), Solicitation Title (QRG: Small Procurement Cat 2 + 3), Solicitation Type (Request for Information), Summary, Additional Information & Instructions, Alternate Link, and Tracking. The "Response Dates" section shows Publish Date (12:00:00 AM), Due / Close Date (8/31/2019 12:00:00 AM), and No end date (No). The "Advanced options" section is also visible.