Creating Small Procurement Category 2 & 3 Sourcing Solicitations

eMMA Quick Reference Guide

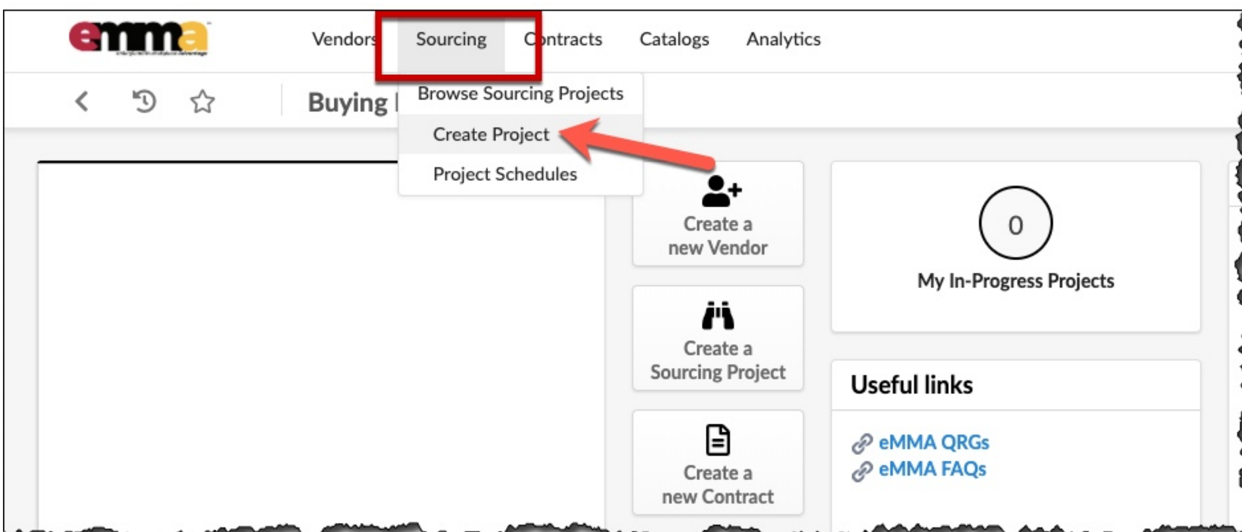
OVERVIEW

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.

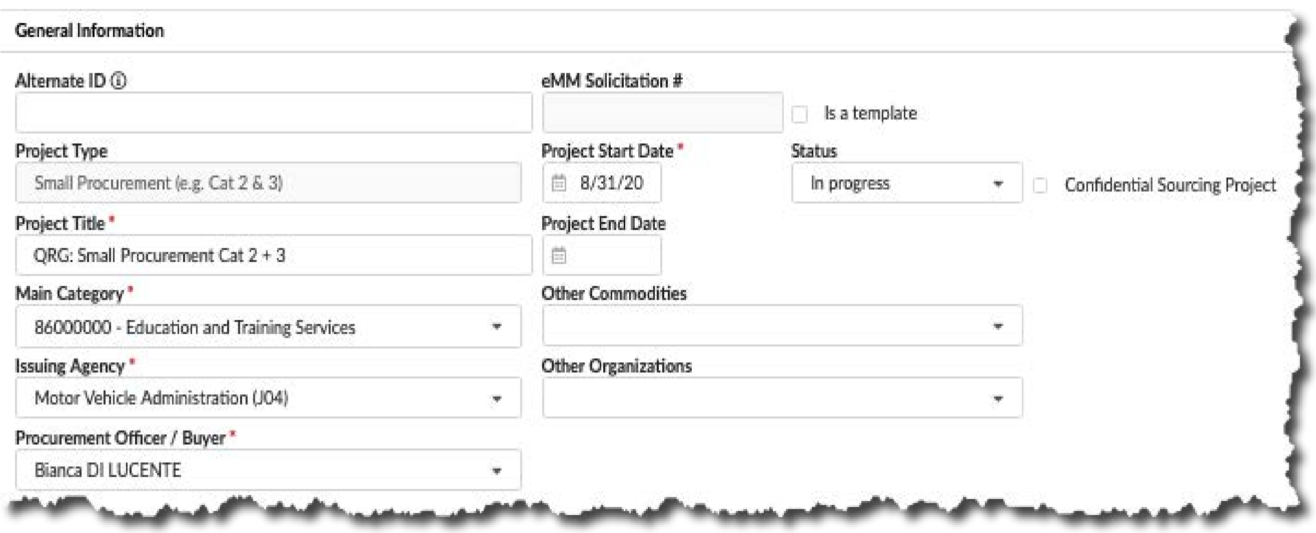


SECTION 2: General Information

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*



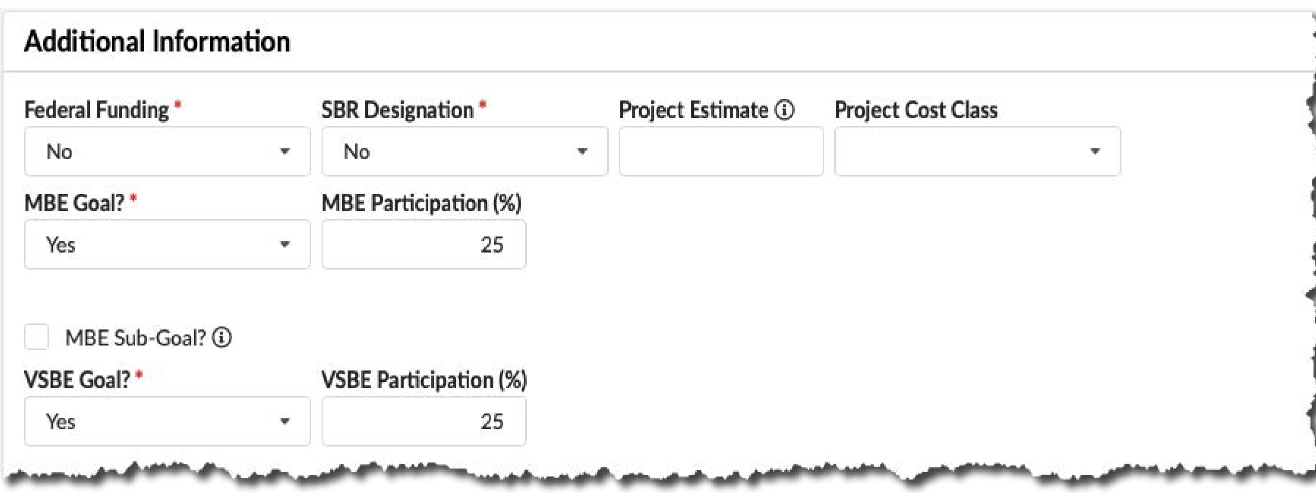
➢ **Once the required criteria is complete, click the "Save" button at the top of the screen**

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*

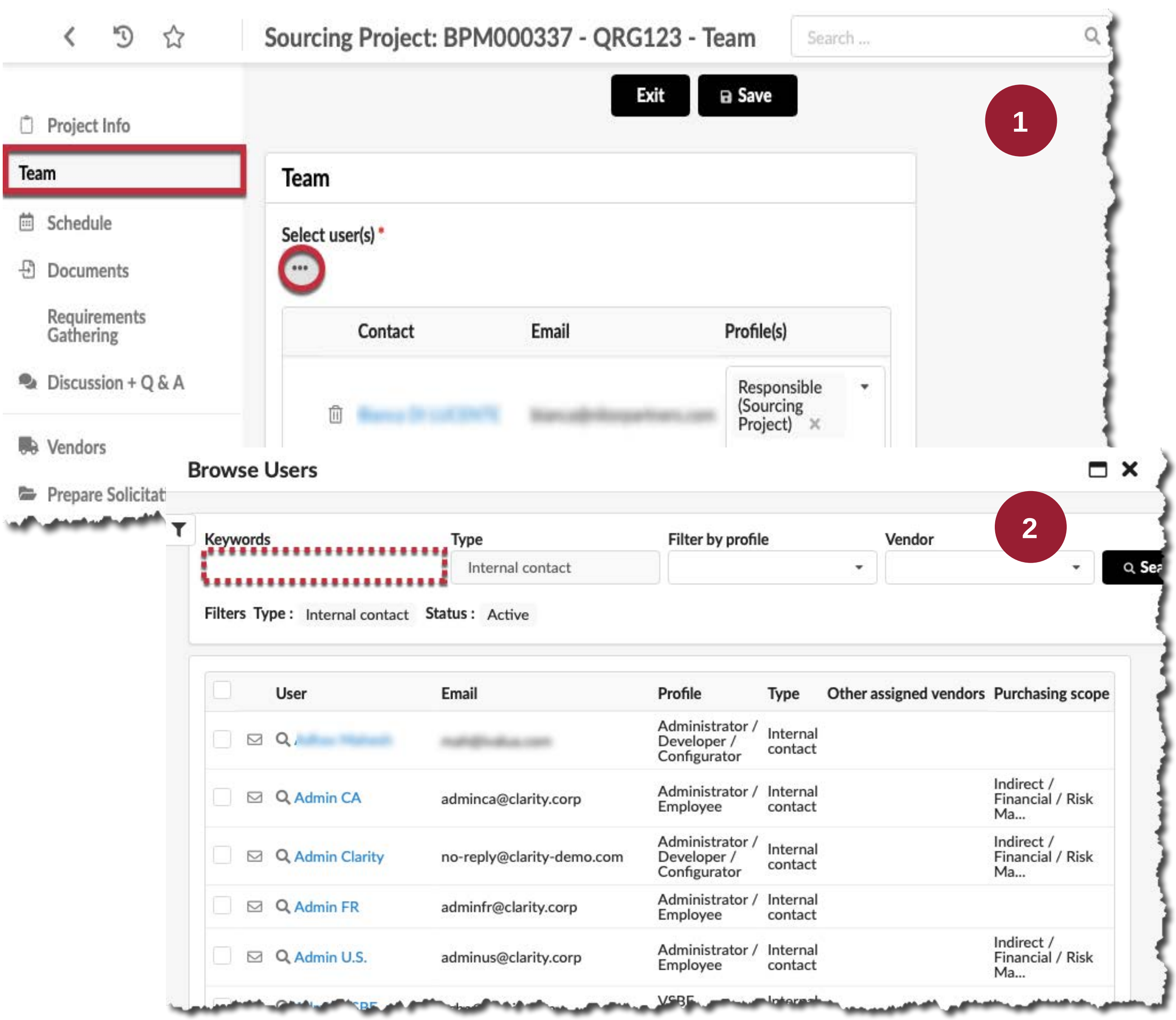


- **Once the required criteria is complete, click the "Save" button at the top of the screen**

SECTION 4: Create a Team

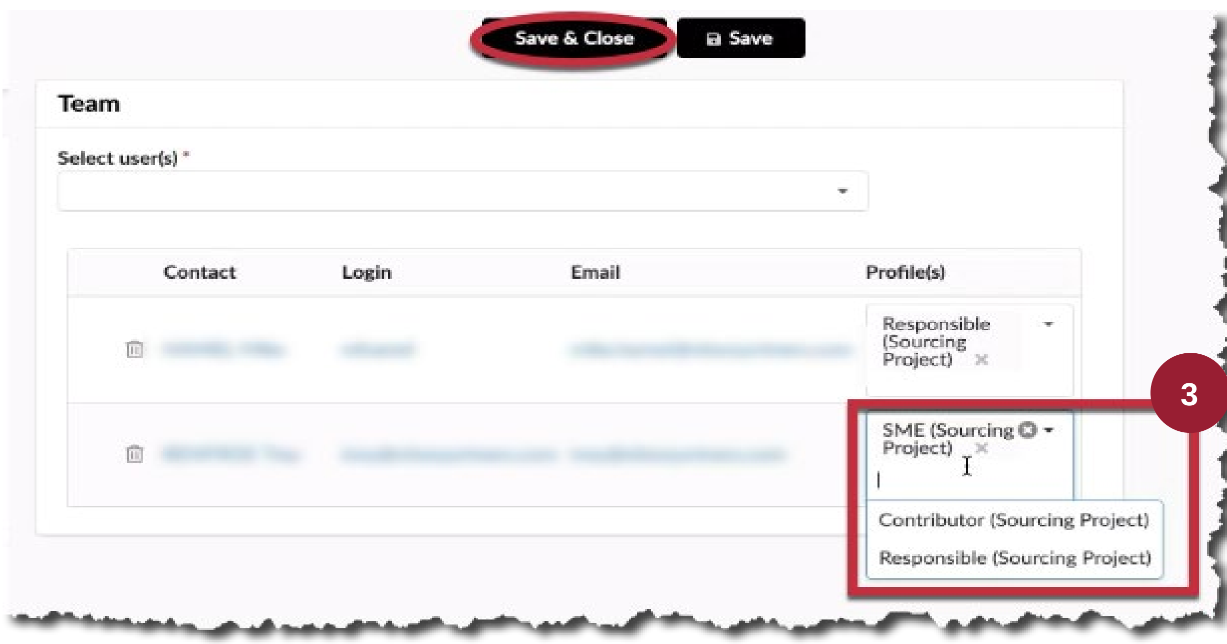
The Owner of the Sourcing Project may choose to create a **Team** for the specific event to drive transparency and collaboration through out the process.

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.



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*

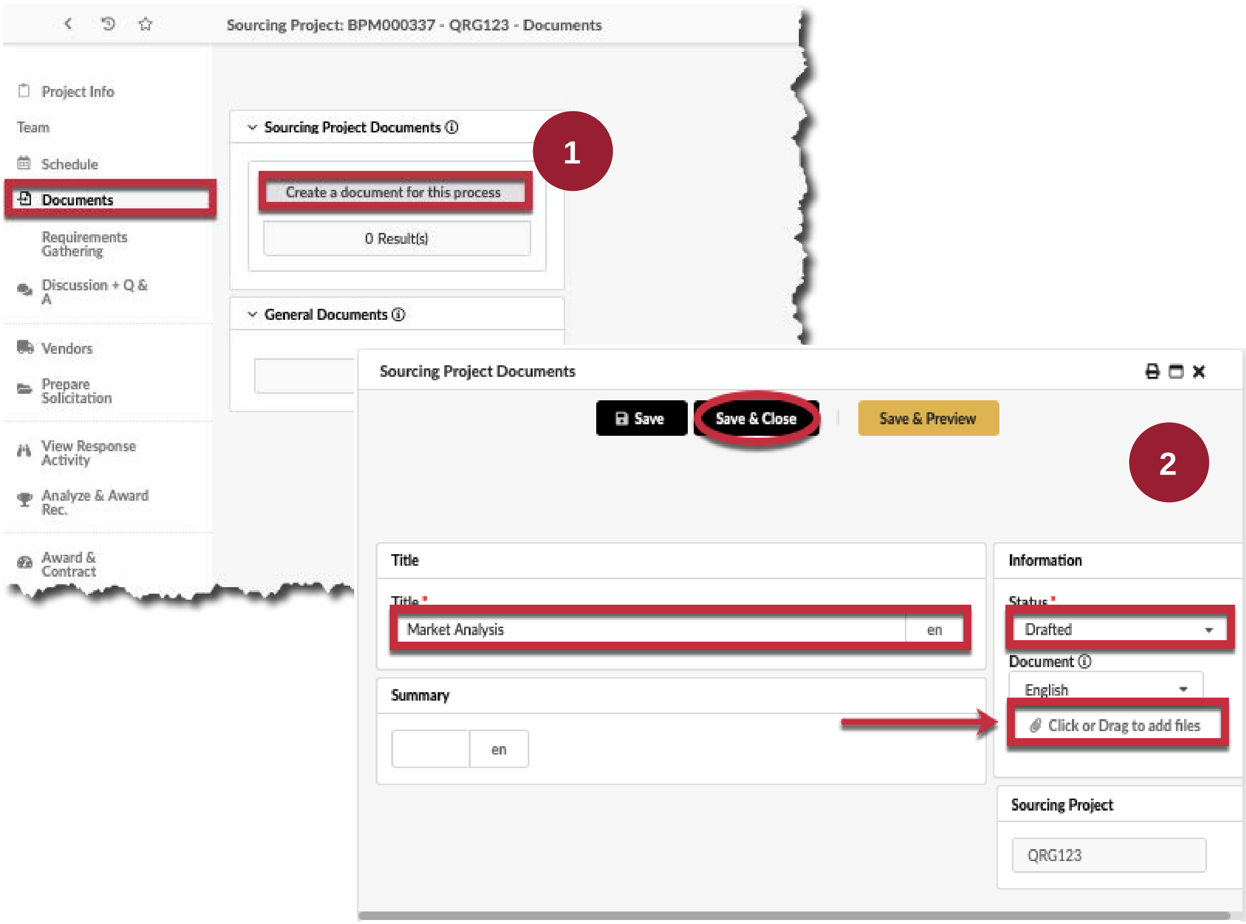


➢ **Once the required criteria is complete, click the "Save & Close" button at the top of the screen**

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.



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

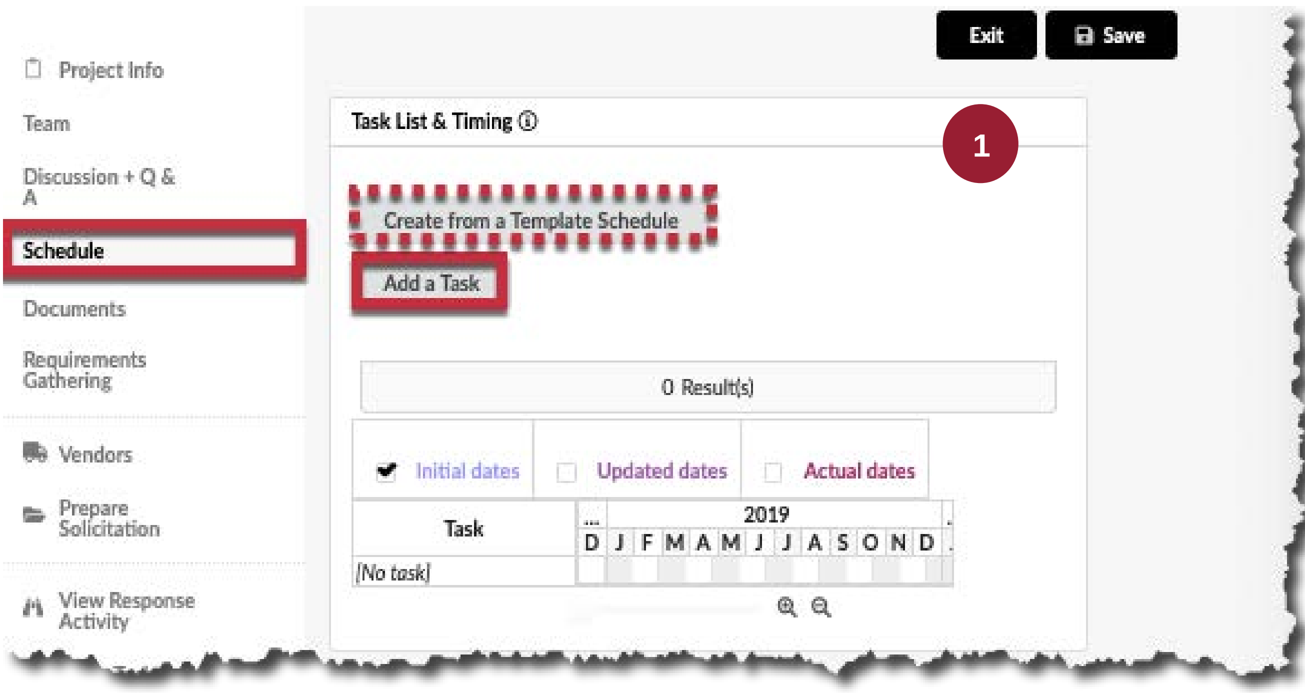
NOTE: *The Documents added to this section are only visible by the internal team to the Sourcing Project. This is an appropriate place to store such items as market analysis, research etc. These documents can be copied to the solicitation and shared with vendors if desired.*

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



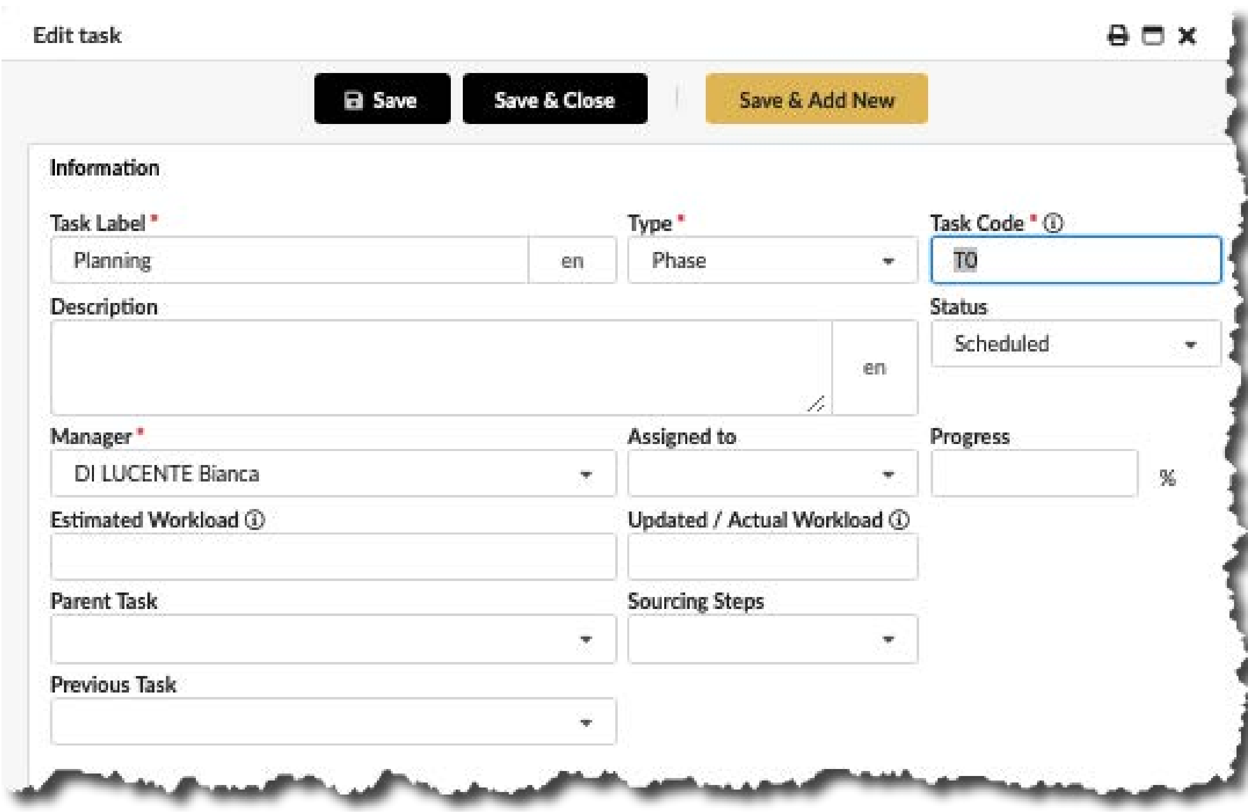
NOTE: *The criteria defined within the* ***Task List & Timing*** *table will auto-populate the* ***"Initial Dates"*** *section of the GANTT chart as illustrated below*

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"**

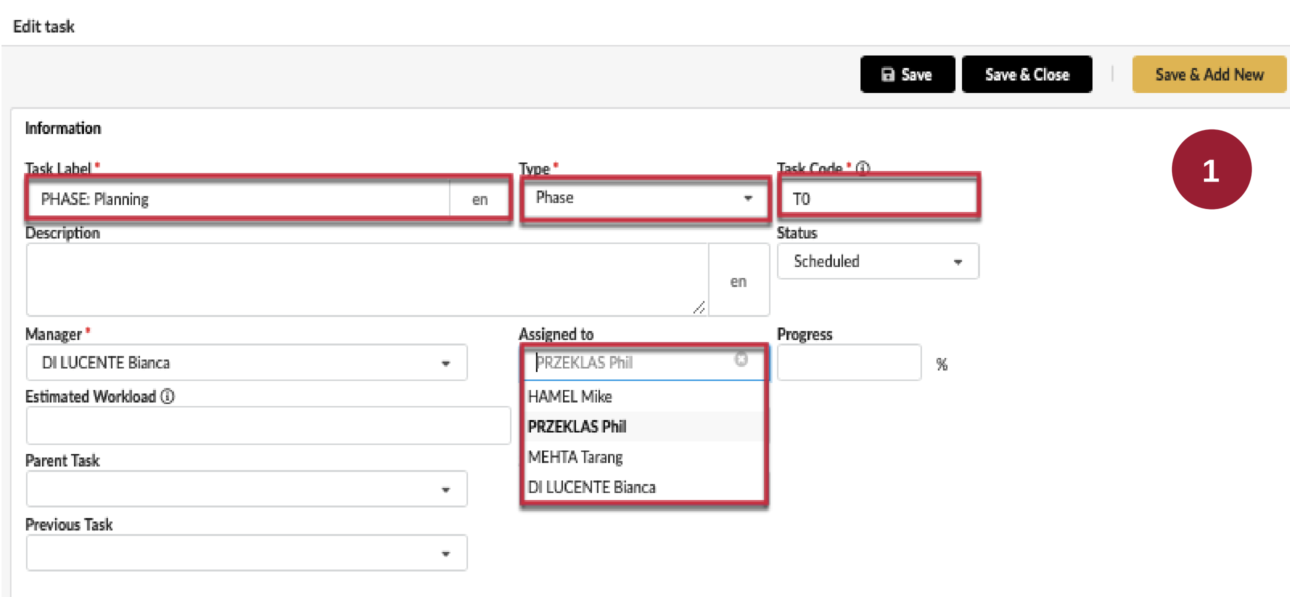
SECTION 6: Create a Sourcing Project Schedule – Editing Tasks (cont.)

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

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

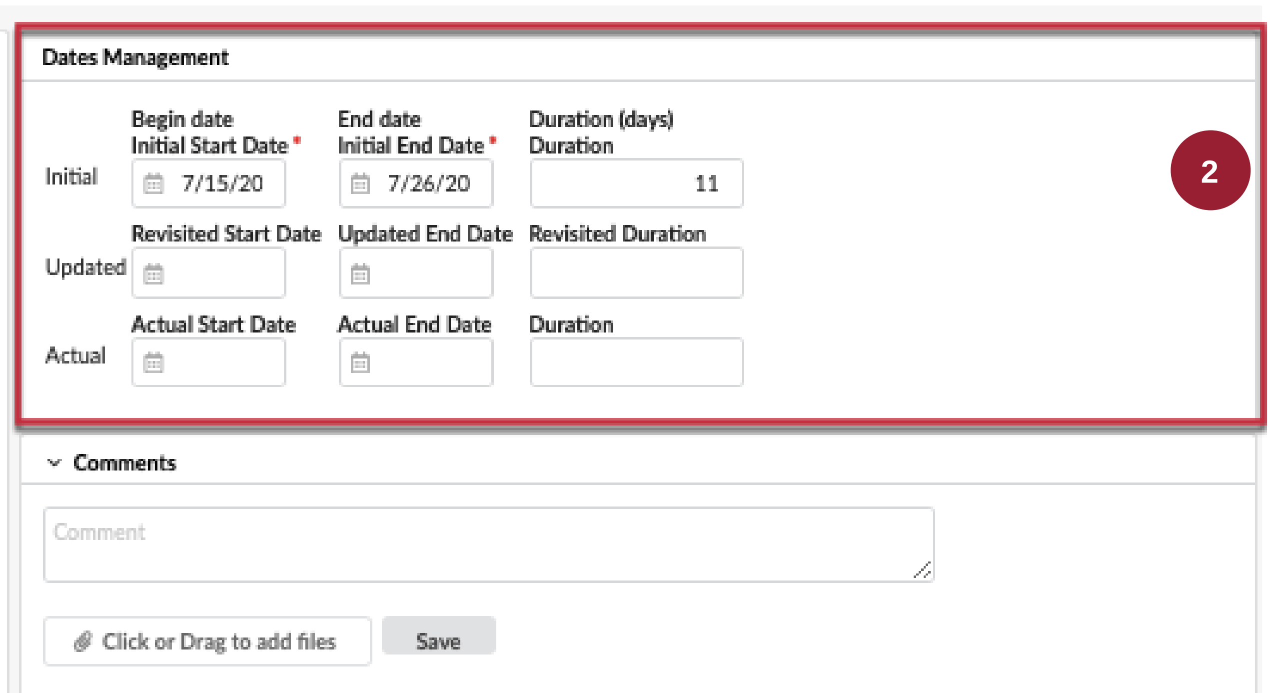
1. Review the **Task Information** fields:
   - **A. Task Label:** *Enter a clear and concise Task Label; additional details may be captured in the **Description** box*
   - **B. Type:** *Select the appropriate option from the drop-down menu (ex. Phase, Meeting, Action)*
   - **C. Task Code:** *This field is system generated*
   - **D. 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*



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*



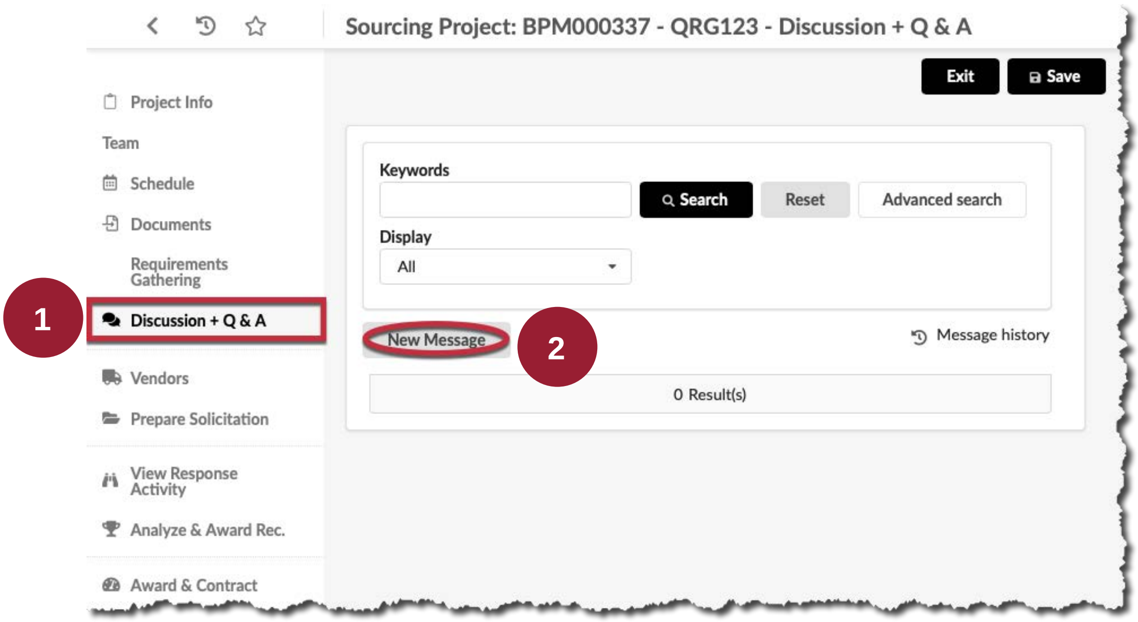
3. Review the **Sub Tasks** for the specified line item located at the bottom of the *Task Editing pop-up screen.*

➢ 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.

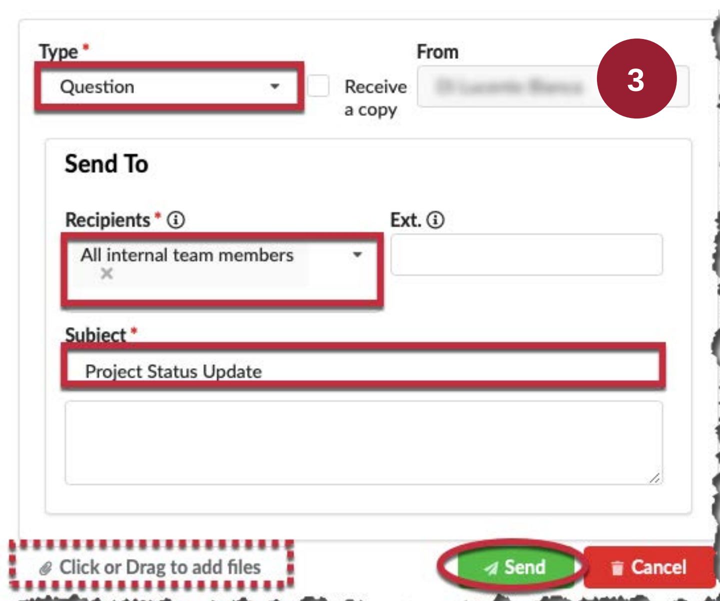


NOTE: *All fields marked with a red asterisk to the right are required and must be completed in order to proceed*

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**

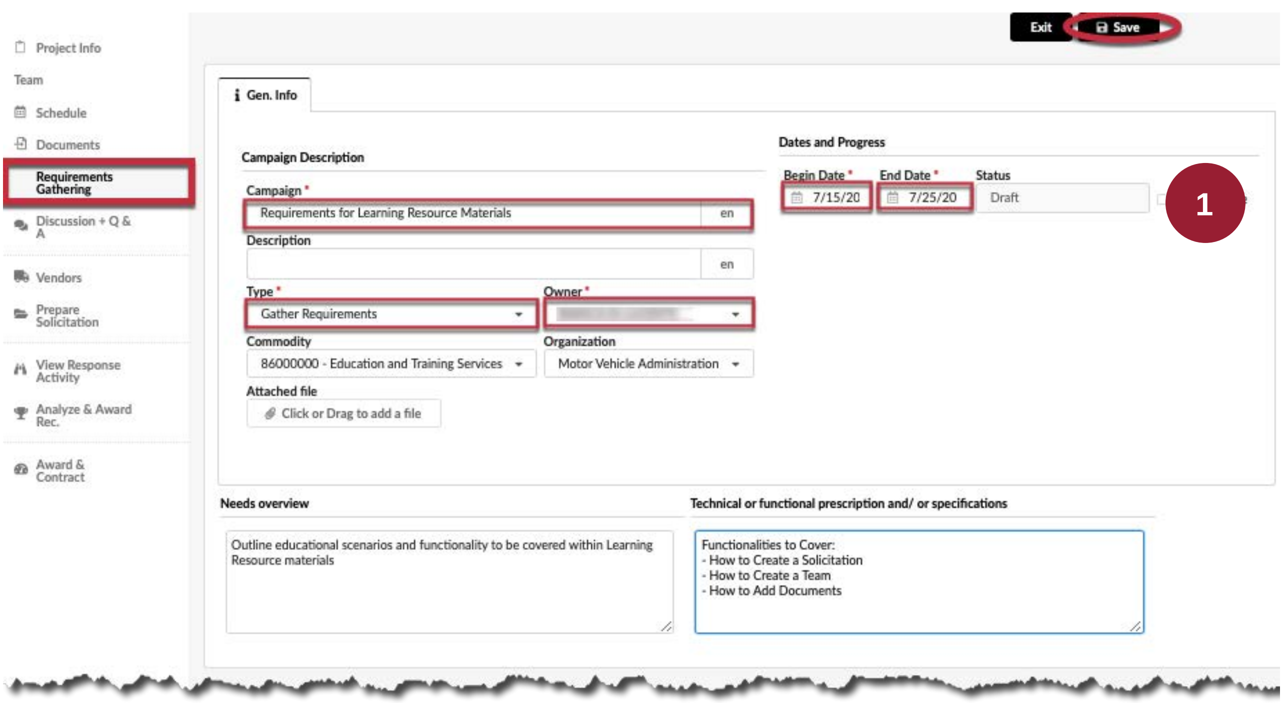


SECTION 8: Requirements Gathering

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*

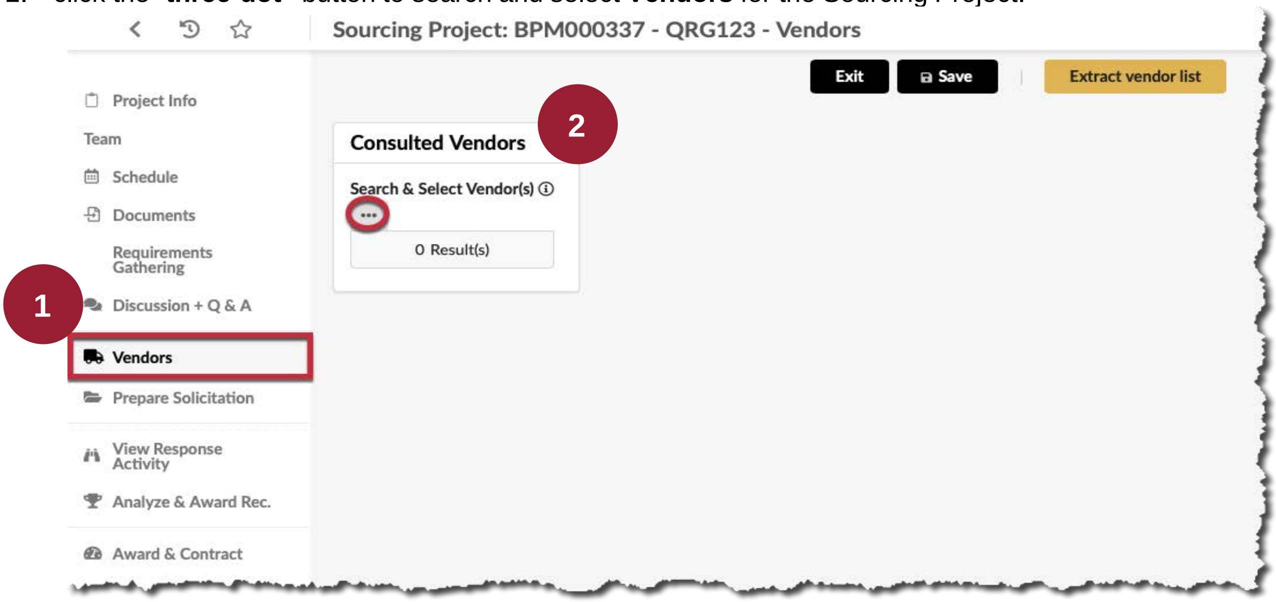


➢ **Once the required criteria is complete, click the "Save" button at the top of the screen**

SECTION 9: Select Vendors

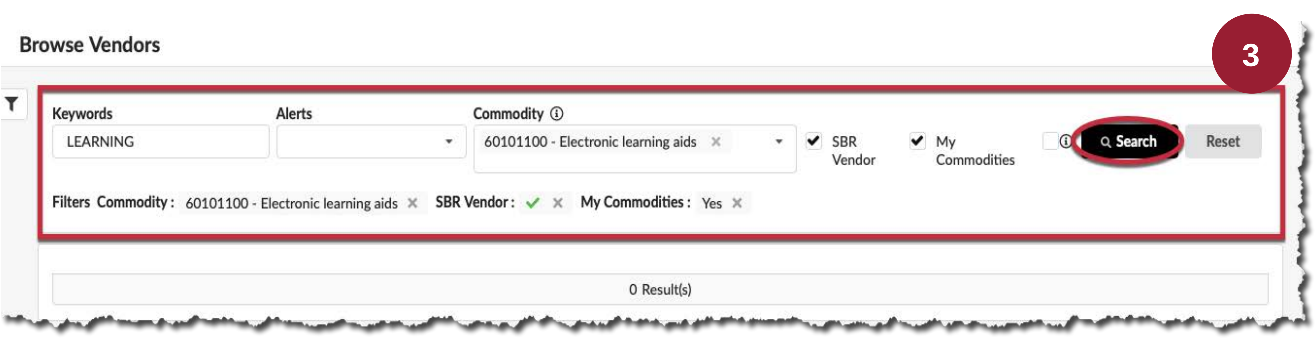
By selecting the ***Vendors*** step on the left side of the screen, the Project Owner will be able to search for and browse **Consulted Vendors** for the Small Procurement Category 2 + 3 Sourcing Project based on identified criteria and requirements.

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.

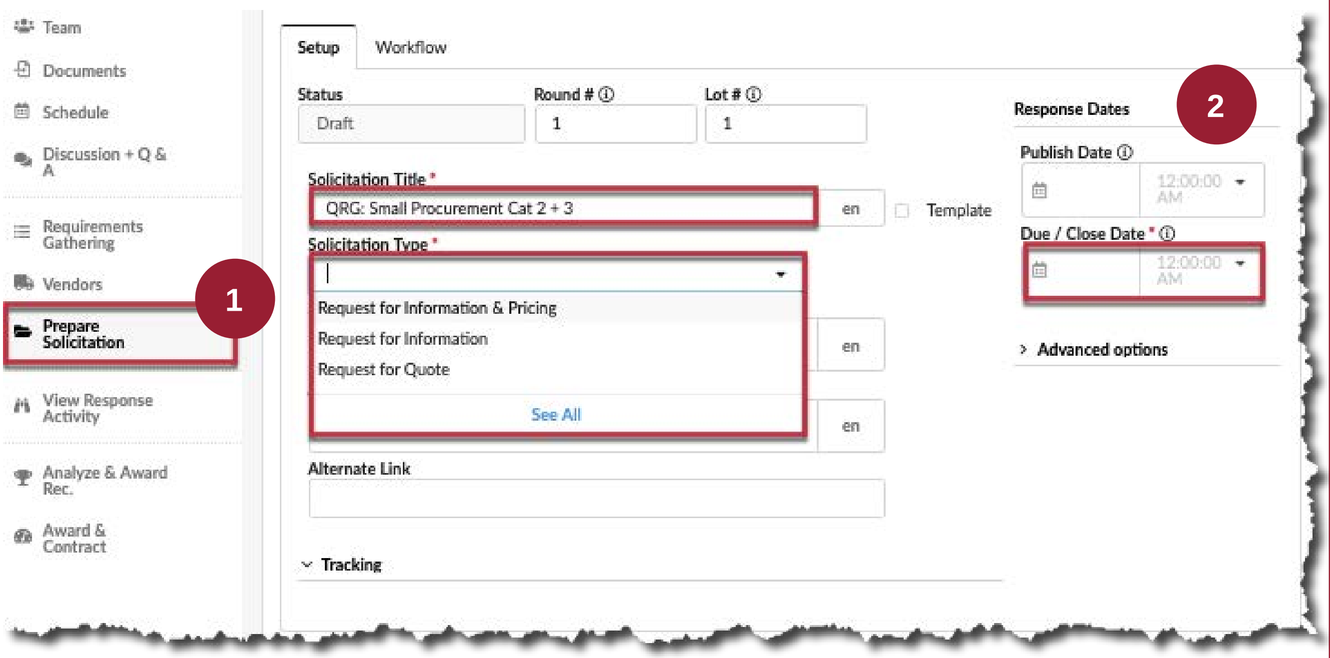


SECTION 10: Prepare Solicitation - Setup

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 <u>automatically</u> 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**

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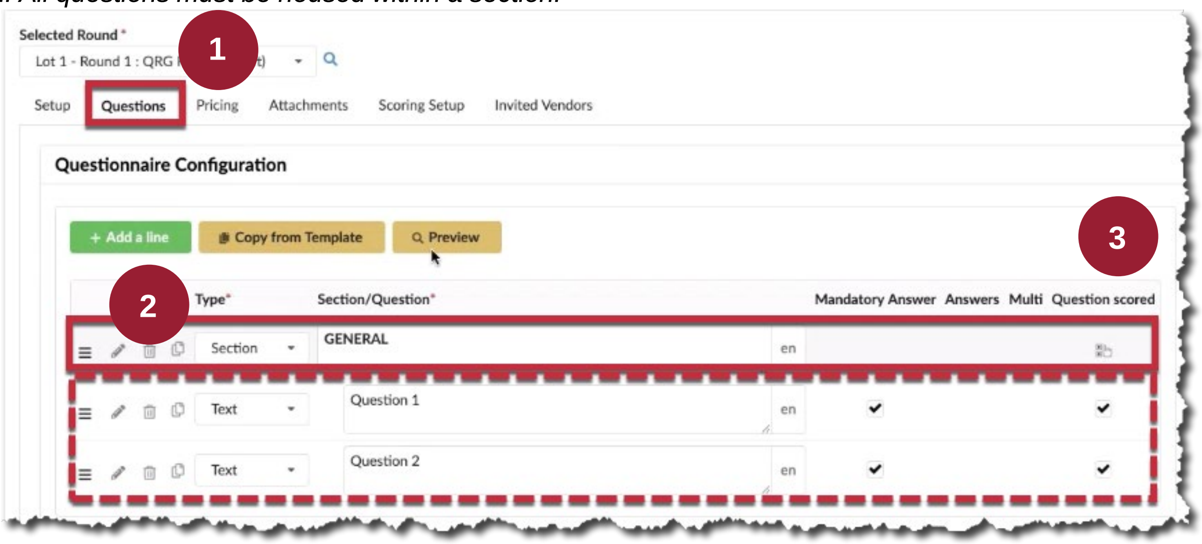
SECTION 10: Prepare Solicitation - Questions and Pricing

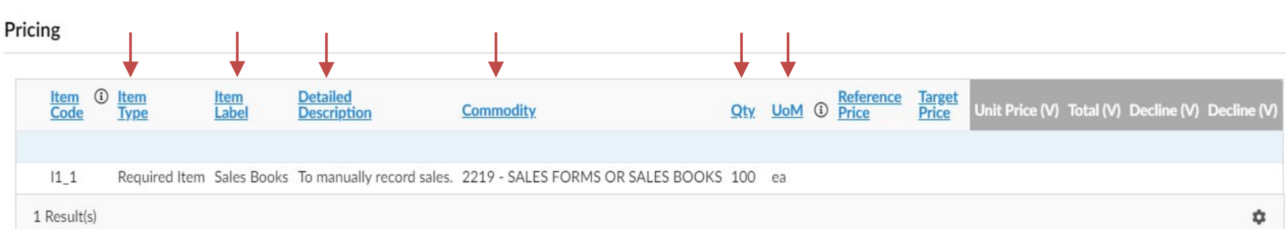
1. Within the **Prepare Solicitation** step, select the **Questions** tab from the top of the screen. (If you wish to add questions that will be scored. This is an optional section.)
2. Create a **“Section”** to categorize a set of Questions.
3. Enter the required Questions as appropriate to each section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



1. **Next**, select the **Pricing** tab to the right of the Questions tab. **<u>THIS MUST BE COMPLETED</u>** 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.*



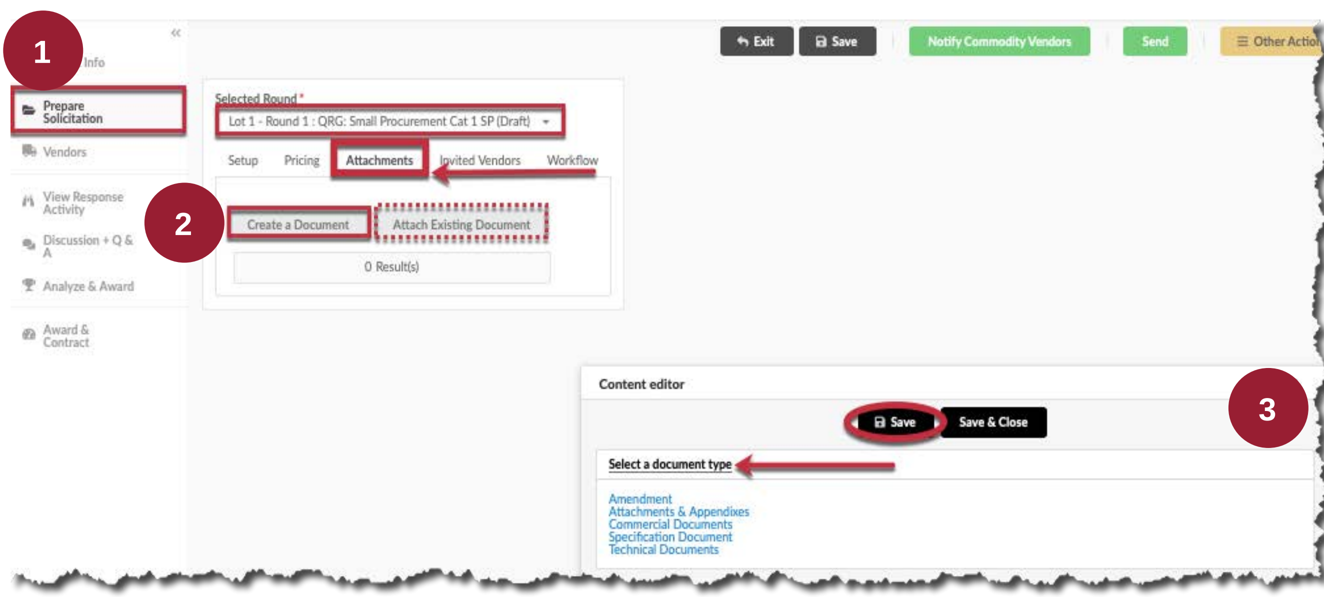
➢ **Once the required criteria is complete, click the “Save” button at the top of the screen**

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".*

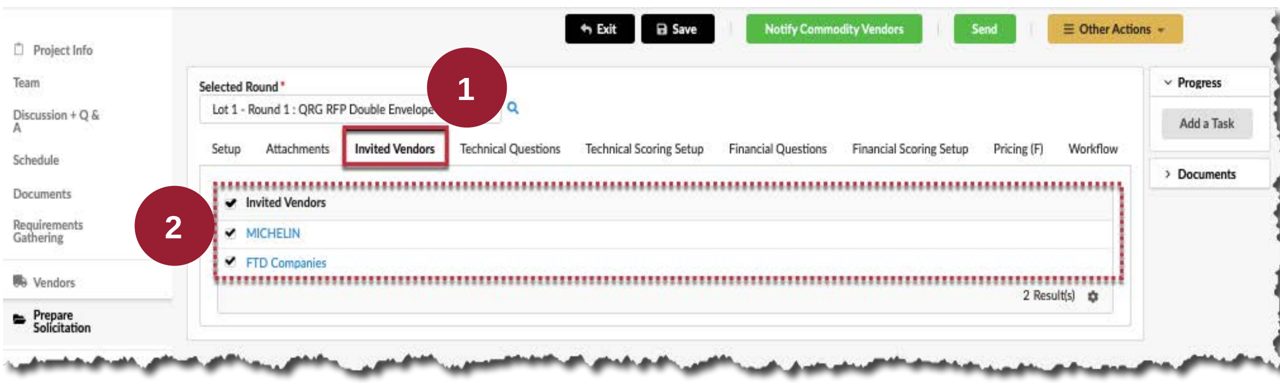


- ➢ **Once the required criteria is complete, click the "Save" button at the top of the screen**

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*

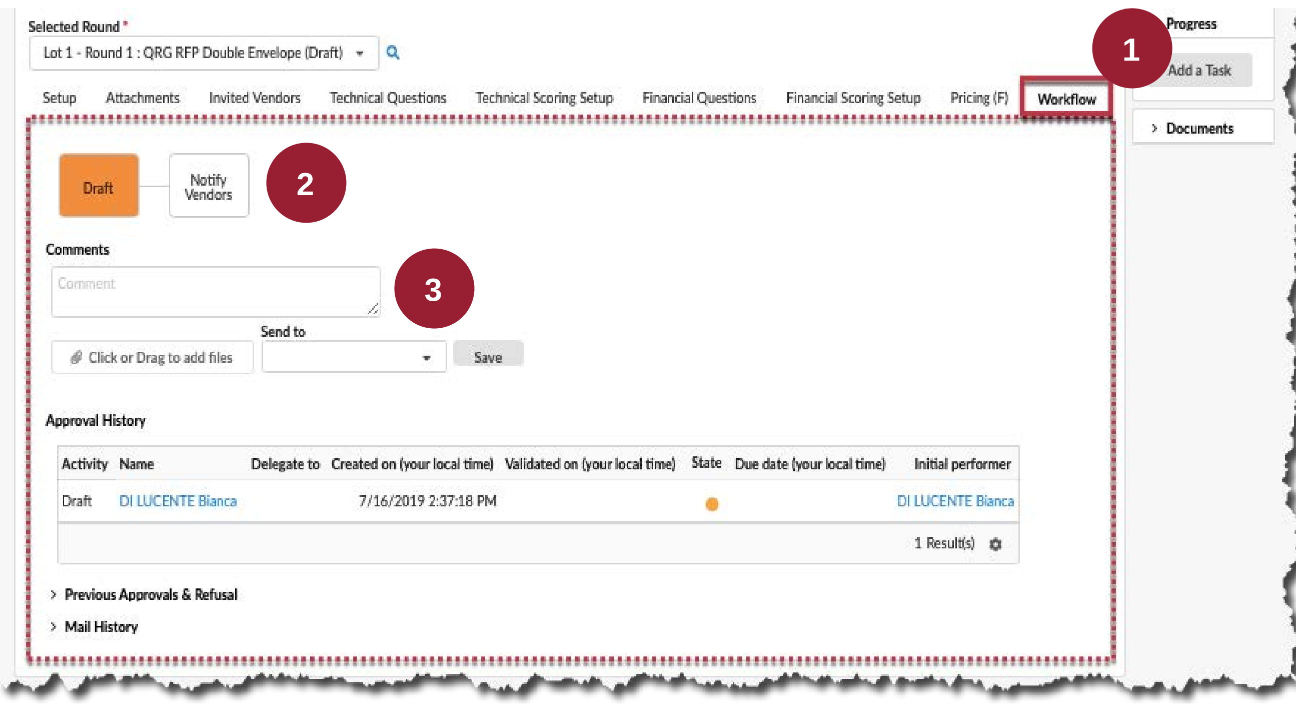


➢ **Once the required criteria is complete, click the "Save" button at the top of the screen**

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*

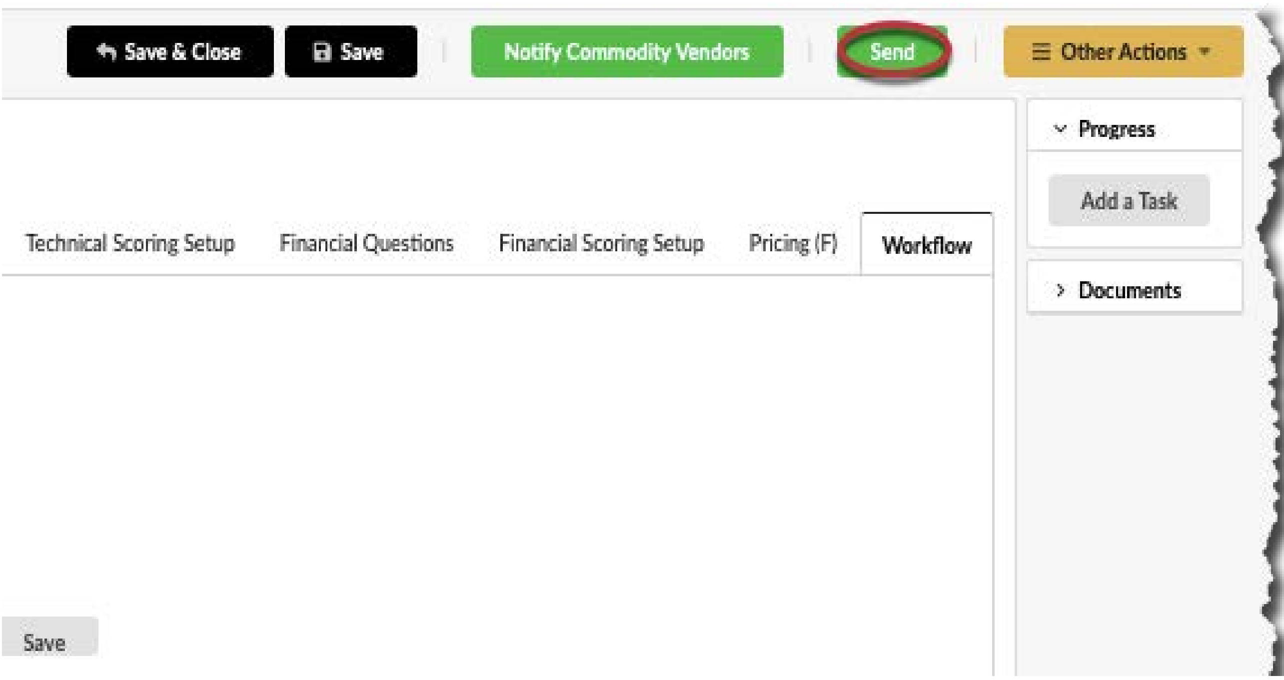


➢ **Once the required criteria is complete, click the "Save" button at the top of the screen**

SECTION 11: Send the Solicitation

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

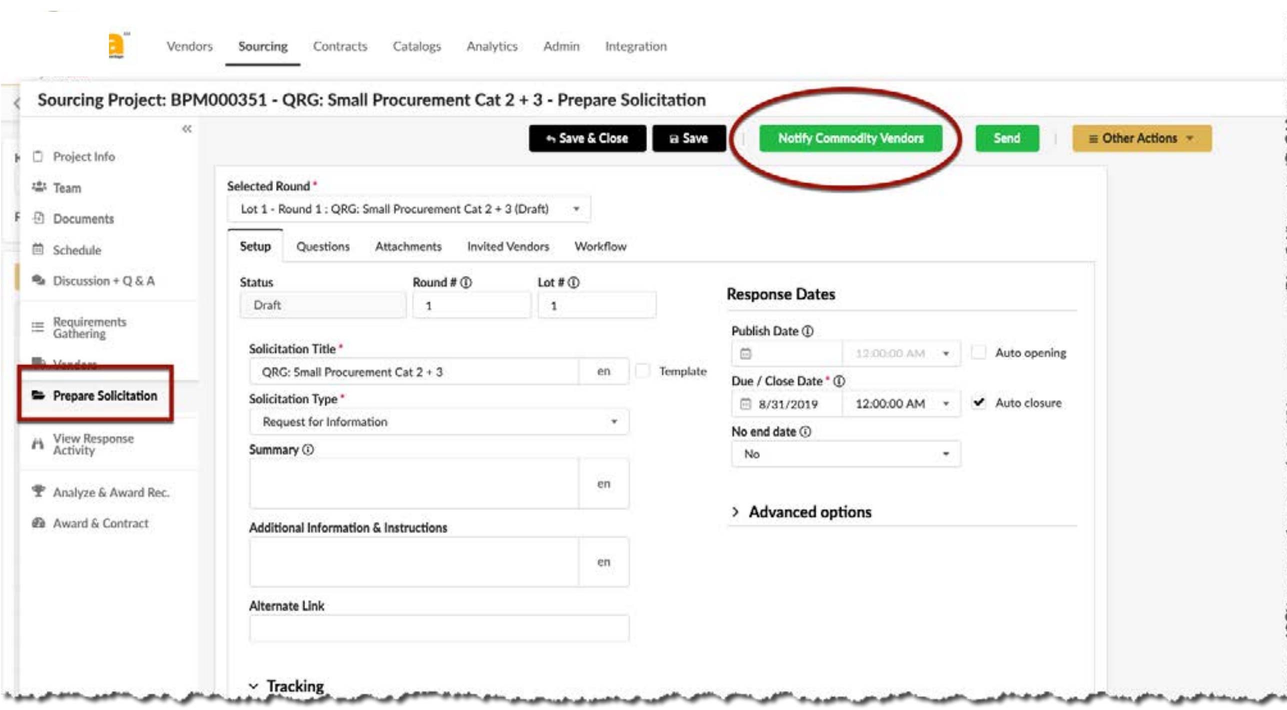
IMPORTANT: Click "Send" once only.
NOTE: *The solicitation will be made public on the date / time as scheduled within the Project Info step*



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.*



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.