eMMA Fundamentals

v2.0
March 13, 2020

Agenda

- ➤ Session Success
- ➤ Maryland Procurement Overview
- ➤ eMMA Overview
- ➤ Creating Sourcing Project
- ➤ Preparing Solicitations
- ➤ Creating Amendments
- ➤ Analyzing and Awarding
- ➤ Next Steps

Agenda

➢ **Session Success**

➢ Maryland Procurement Overview

➢ eMMA Overview

➢ Creating Sourcing Project

➢ Preparing Solicitations

➢ Creating Amendments

➢ Analyzing and Awarding

➢ Next Steps

Session Success

"Success" = Becoming familiar with eMMA

Keys to Success include:
1. Stay <u>engaged</u>
   - Ask questions
   - Listen
   - Take notes

2. Stay <u>on-task</u>
   - Follow Facilitator instructions and work at the pace of the class
   - Avoid the temptation to "explore"
   - Avoid email/phone calls ("interruptions")

3. Stay <u>on-time</u>
   - Return from break(s) ontime
   - Get out of class on time.

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Maryland Procurement Overview

Maryland Procurement Manual

Linked from https://procurement.maryland.gov

Principal Purposes and Policies

- Providing for increased confidence in State procurements;

- Ensuring fair and equitable treatment of all persons who deal with the State procurement system;

- Providing safeguards for maintaining a State procurement system of quality and integrity;

- Fostering effective broad-based competition in the State through support of the free enterprise system;

- Promoting increased long-term economic efficiency and responsibility in the State by encouraging the use of recycled materials;

Principal Purposes and Policies cont'd

- Providing increased economy in the State procurement system;

- Getting the maximum benefit from the purchasing power of the State;

- Simplifying, clarifying, and modernizing the law that governs State procurement;

- Allowing the continued development of procurement regulations, policies, and practices in the State; and

- Promoting development of uniform State procurement procedures to the extent possible

Procurement Support
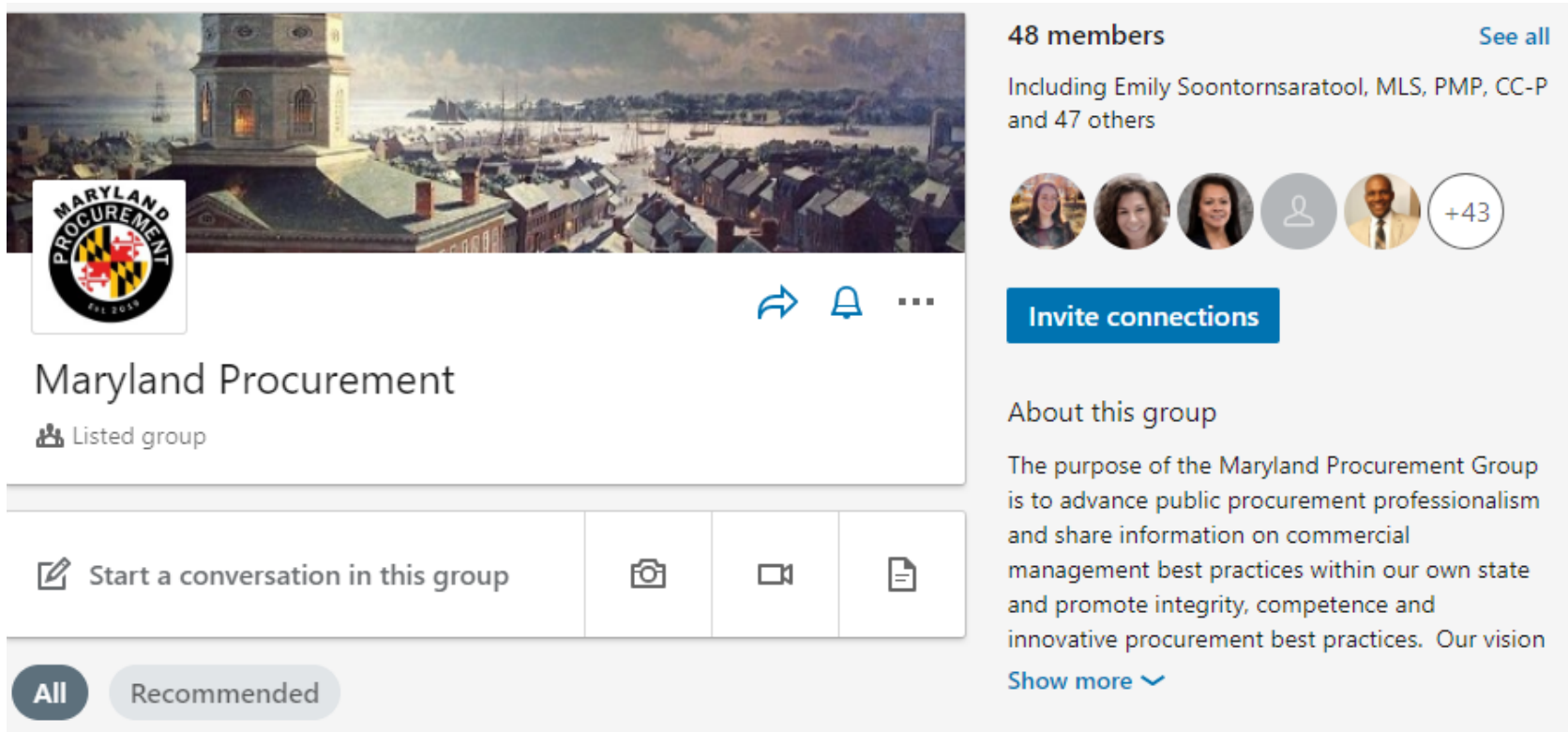
Bolster knowledge and success by:

- Keeping a copy of COMAR Title 21 at your desk;
- Asking questions from other knowledgeable procurement and/or OSP staff;
- Attending Maryland Procurement Academy training programs; https://procurement.maryland.gov/training/
- Read or watch procurement related information, and,

Procurement Support cont'd

- Join Maryland Procurement LinkedIn Group, at
  https://www.linkedin.com/groups/8853173/

Procurement Support Resources

eMMA Helpdesk

emma.helpdesk@Maryland.gov

Quick Reference Guides

https://procurement.maryland.gov/emma-qrgs/

Vendor Training *(to know what they do and see)*

https://procurement.maryland.gov/training/

**Online eMMA Training for Vendors
Submitting Electronic Bids**

Submitting Electronic Bids (the .pdf versions)

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eMMA Home – emma.maryland.gov

Welcome to eMaryland Marketplace Advantage (eMMA)

LOGIN

Email / Username

Password

Login

Forgot Password?

eMMA is Maryland's new online procurement platform used to connect the vendor community with contracting opportunities from state, county, and local government entities. Registered vendors will receive notices of bid opportunities, can submit bid responses online, and may obtain bid results online.

Qualified vendors may also complete the self-certification process for the Small Business Reserve (SBR) Program and Veteran-owned Small Business Enterprise (VSBE) Program.

eMMA facilitates an open, transparent, and efficient procurement process. We look forward to doing business with you!

New Vendor? Register Now

Public Solicitations

Public Contracts

Vendor Search

eMMA Overview

What is eMMA?

- ✓ **Our new tool for Solicitations**
- ✓ Source to Pay
- ✓ Coming releases will have ability to:
  - ✓ Create Purchase Orders
  - ✓ Invoice capture & storage
  - ✓ Expedite invoice processing

eMMA is <u>not</u>…

- ✗ 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

eMMA	Definition
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
Solicitation	The actual elements of the procurement including open/close dates, price grids, questionnaires (general, technical, and/or financial), documents, vendor responses, and awards
Amendment	Additional information or changes to an existing published solicitation provided to Vendors in a new Round (i.e., version control)

eMMA Overview

Terminology

eMMA	Definition
Envelope	"Digital" envelope in eMMA; i.e. technical proposal, or financial proposal
Questions	e.g., Min quals for IFB or criteria/specification for Solicitation can be developed as "questions"
Team	People you interact with on a Solicitation (e.g, end users, evaluators, SMEs, etc.)
Pricing Grid	Grid that lists items as part of Solicitation (quantity and units of measure)

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.**
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.** **(COMAR 21.05.07.04)**
Small Procurement **(e.g. Cat 2 & 3)**	A small procurement project type meant for **purchases less than $50,000** focused on pricing and technical criteria.

eMMA Overview

Sourcing Project Types

The Sourcing Project type determines the steps necessary in eMMA.

TYPE	DESCRIPTION
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, 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

eMMA Overview

Sourcing Project Types to Solicitation Type Mapping

SOURCING PROJECT TYPE	SOLICITATION TYPE
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

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

- Replica of the Production Instance

- Available for practice after class

eMMA Live

- Two options

  1. https://connect.md.gov; *or*

  2. https://emma.maryland.gov
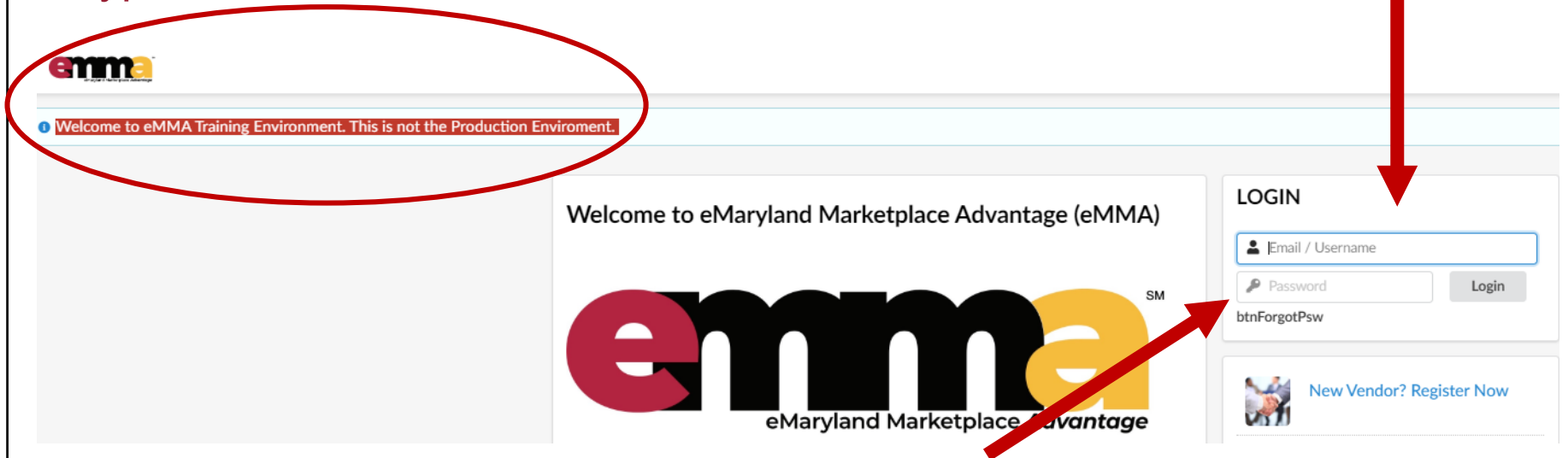
eMMA **Training** Instance Login

eMMA Training

Login to Training Instance (for eMMA training, not production)

1. Open Google Chrome and navigate to http://bit.ly/emmatraining

2. Type your Username (your eMMA login) = your email address

4. Type the Password = **eMMA.01.2019!**

ⓘ Welcome to eMMA Training Environment. This is not the Production Enviroment.

Welcome to eMaryland Marketplace Advantage (eMMA)

LOGIN

👤 Email / Username

🔑 Password   Login

btnForgotPsw

New Vendor? Register Now

eMMA Overview

Navigation
Go back one screen

Select a previous page

Create a "Favorite"

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

User Profile
Manage basic profile settings

Quick Links
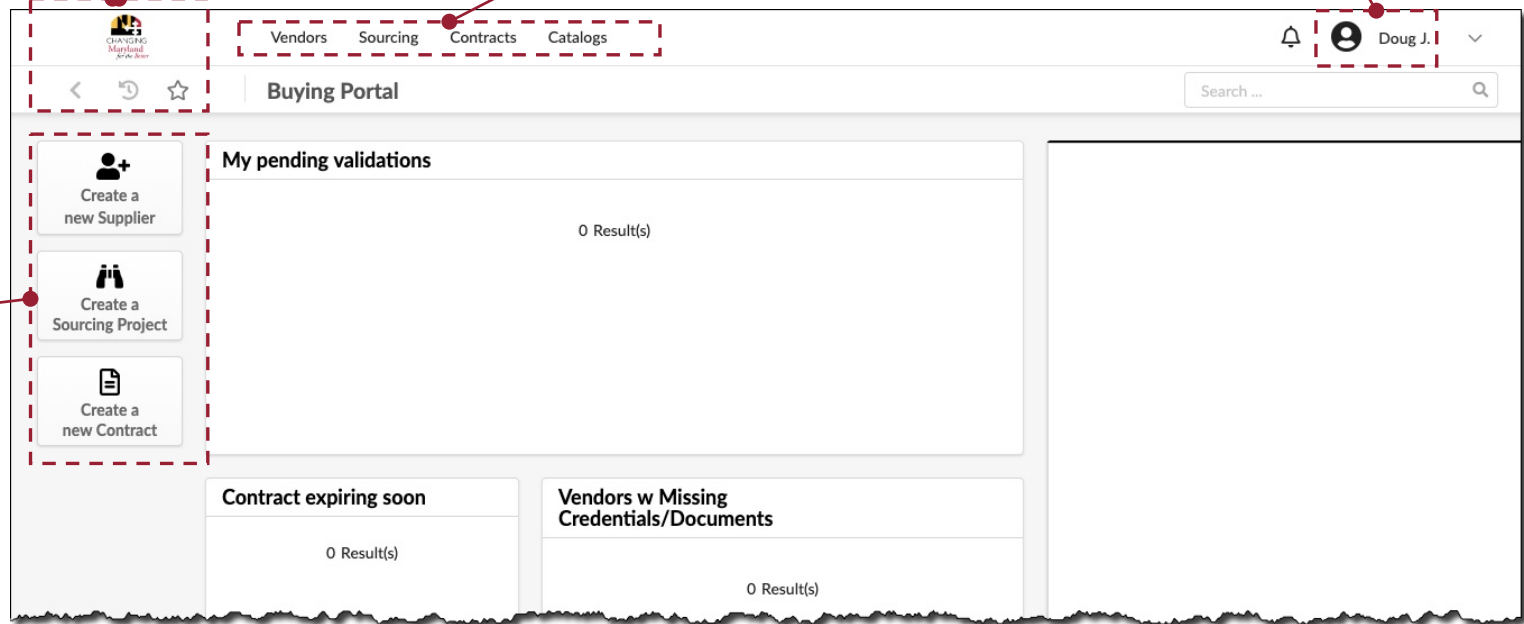
Vendors   Sourcing   Contracts   Catalogs

Doug J.

Buying Portal

Search ...

Create a new Supplier

Create a Sourcing Project

Create a new Contract

My pending validations

0 Result(s)

Contract expiring soon

0 Result(s)

Vendors w Missing Credentials/Documents

0 Result(s)

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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
- Upload and distribute all documents
- Invite Vendors
- 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 in production system

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
3. Adjust the schedule as necessary and
4. Click **Save**.

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, if 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

1. Click "Vendors" tab (left)
2. Click [...] to search for and select Vendors; eMMA filters to Vendors associated with main category
3. Choose at least 1 vendor.
   * You do not have to choose each vendor, you can send to all in commodity category a little later. *
4. Click **Save**

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

Creating Sourcing Project

TIPS

- Prior to creating a Sourcing project, <u>you must know</u> the Sourcing project type, main category, and issuing Agency.

- The Sourcing project type determines the steps (eMMA tabs) and Solicitation type(s) available.

- Team profiles - FYI
  - "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.

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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

Preparing Solicitations – Setup

PROCESS

1. Click "Prepare Solicitation" tab (left)
2. Add title, select "Solicitation Type"
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. Select Show Bid Holders list, if appropriate
6. 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	The date/time the bidders/vendors can start submitting responses. Will update if Solicitation is sent/published prior to date/time entered.
Due/Close	The date/time when Bidders/Vendors can no longer submit responses.
Public Portal Publish	The date/time this solicitation will be visible on the public bid board. Leave as same as Publish by default.
Public Portal Archive	The date/time the solicitation will be hidden from the public bid board. **Default is seven (7) years from "Due/Close" date.**

Preparing Solicitations – Attachments

PROCESS

1. In "Prepare Solicitation" tab, click "**Attachments**" sub-tab

2. Click **Create a Document**; select "Document Type"

3. Click or drag to add files

4. Update "Status" to approved

5. Click **Save**

6. Repeat, as needed

7. When all added, click **Save & Close**

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

Preparing Solicitations – Questionnaire

PROCESS

1. In "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 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. In "Prepare Solicitation" tab, click the "Pricing" sub-tab; a pre-populated Pricing grid displays

2. Complete information for first item, click **Save**; repeat as needed

3. When all pricing entered, click **Save & Close**

NOTE: Export/import functionality available for Excel

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 **Send**
4. Review
   - ⚠️ Blocking alerts – Must be cleared to proceed
   - ⚠️ Non-blocking alerts – Cautionary only
5. **Validate that 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" <u>must</u> be in the future.

- You can create your own Questionnaire and Pricing Grids for Solicitations (QRGs available); these can be used as <u>templates</u> for future Solicitations.

- To send the Solicitation to an unregistered Vendor, email 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

- Amendment = Update for new information to existing solicitation.
- An Amendment **requires a new Round** to be created
- All information from previous Round should be put in new round (minus changed) = DEFAULT.
- All new/updated information must be added in new round.
- Previous round closed, vendor's can not access it.
- Vendor's notified of new round in system,
    - NOTE: You should email them also. (Junk mail folder)
- Vendors should acknowledge new round.

Creating Amendments

PROCESS

1. In "Prepare Solicitation" tab, click **Other Actions,** select **Create a new round**

2. Duplicate information from previous round

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" to approved

7. Click or drag to add files

8. Click **Save & Close**,

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

- 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.

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

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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

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

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
2. Click **Open Sealed Responses**

NOTE: This is only available after due date.

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

*Specific IFBs require Vendors to respond electronically

Analyzing and Awarding

PROCESS

Awarding

1. From the "Analyze & Award Rec." tab, click "**Awarding**" sub-tab

2. Choose "Award Strategy" algorithm, "Manually Award", or "Award All", as needed

3. Click **Confirm Award**, <u>when final</u>; *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.

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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Next Steps

User reference materials
- Quick Reference Guides (QRGs)
- FAQs

eMMA Help Desk

emma.helpdesk@maryland.gov

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