

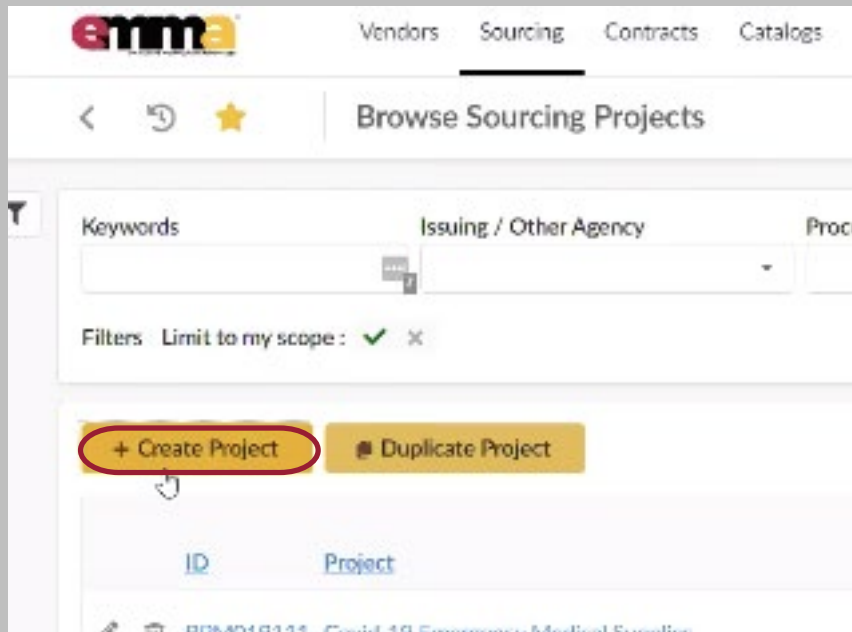
OVERVIEW

This Quick Reference Guide (QRG) is designed to help State Procurement Officers understand the steps necessary to create a *COVID-19 relevant* Request for Information (RFI) within eMaryland Marketplace Advantage (eMMA).

IMPORTANT: For best results, access eMMA via Google Chrome.

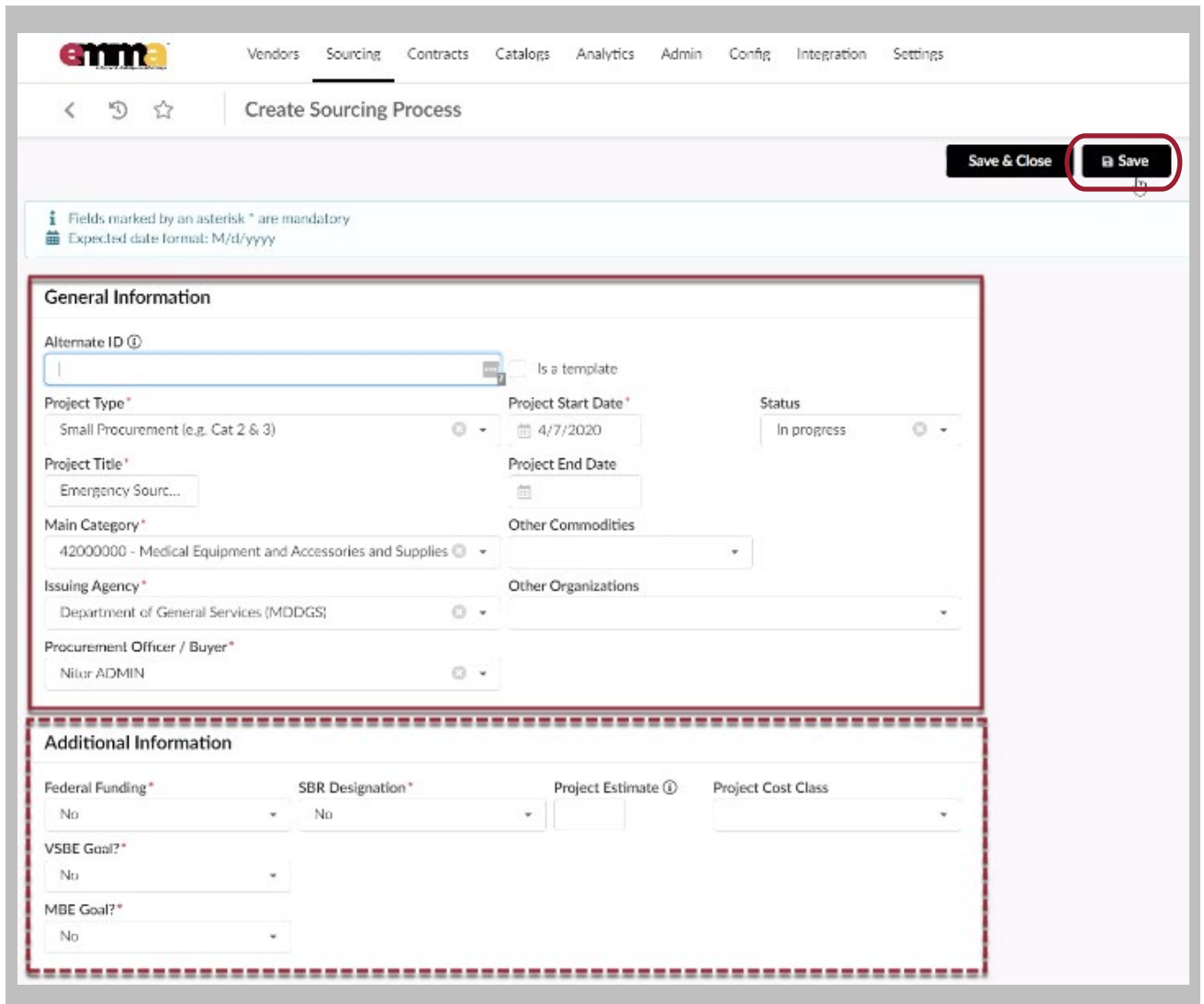
Create a Sourcing Event

From the Sourcing tab at the top of the screen, click **Create Project**.



Create the Sourcing Process

1. Complete the *General Information* fields.
2. If applicable add any SBR, VSBE or MBE information with the *Additional Information* portion.
3. Click **Save** to proceed.



The screenshot shows the 'Create Sourcing Process' form in the eMMA system. The form is divided into two main sections: 'General Information' and 'Additional Information'. The 'General Information' section includes fields for Alternate ID, Project Type, Project Title, Main Category, Issuing Agency, and Procurement Officer. The 'Additional Information' section includes fields for Federal Funding, SBR Designation, Project Estimate, Project Cost Class, VSBE Goal, and MBE Goal. A 'Save & Close' button and a 'Save' button are visible in the top right corner. The 'Save' button is highlighted with a red circle. A red dashed box highlights the 'Additional Information' section.

Fields marked by an asterisk * are mandatory
Expected date format: M/d/yyyy

General Information

Alternate ID

Is a template

Project Type*

Project Start Date*

Status

Project Title*

Project End Date

Main Category*

Other Commodities

Issuing Agency*

Other Organizations

Procurement Officer / Buyer*

Additional Information

Federal Funding*

SBR Designation*

Project Estimate

Project Cost Class

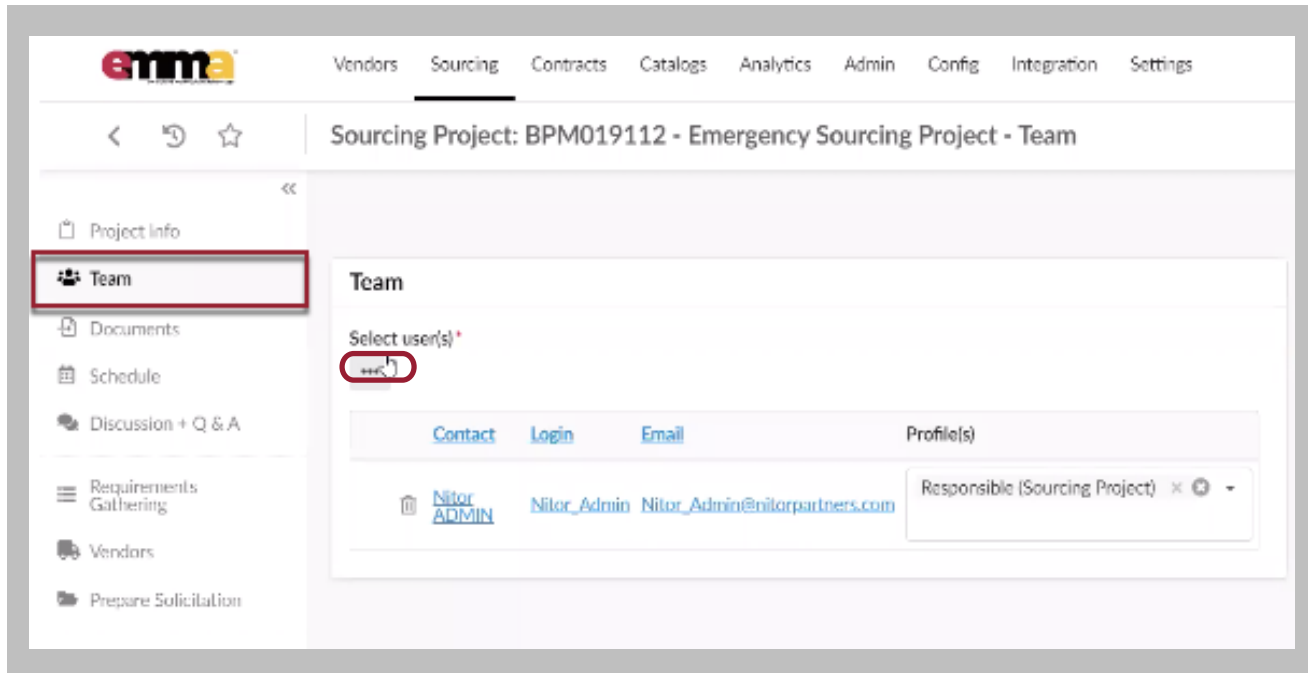
VSBE Goal?*

MBE Goal?*

Establish Sourcing Project Team

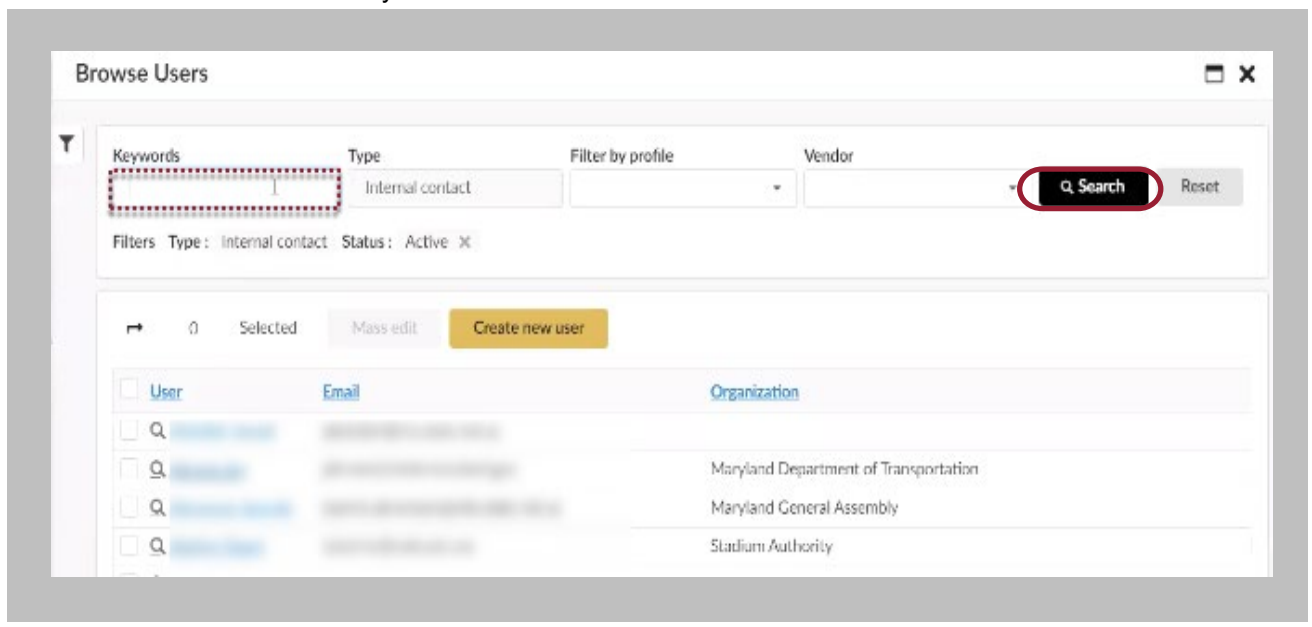
NOTE: The following section pertains only to solicitations with a team; if your solicitation does not require a team skip to Page 5 of this guide to continue.

1. Click the **Team** section on the left side menu; click the **ellipsis** to add members.



The screenshot shows the 'Sourcing Project: BPM019112 - Emergency Sourcing Project - Team' page. The left sidebar menu has the 'Team' option highlighted with a red box. In the main content area, the 'Team' section is visible, featuring a 'Select user(s)*' label and a red circle around the ellipsis icon. Below this, there are links for 'Contact', 'Login', and 'Email', and a 'Profile(s)' dropdown menu. A user profile for 'Nitor ADMIN' is listed with the email 'Nitor_Admin@nitorpartners.com' and the role 'Responsible (Sourcing Project)'.

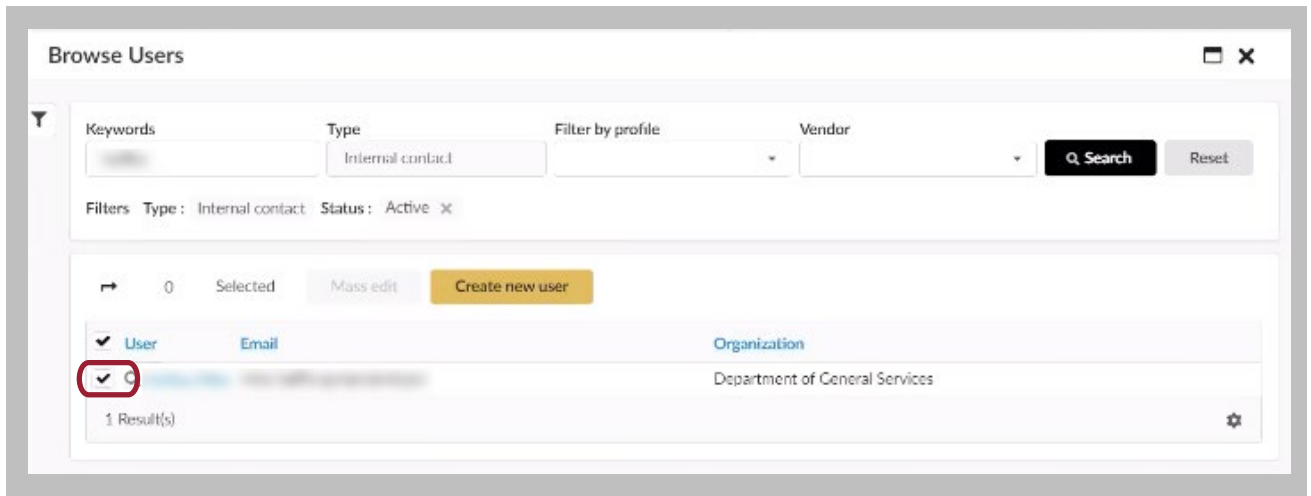
2. Enter the criteria into the keyword box and click **Search**.



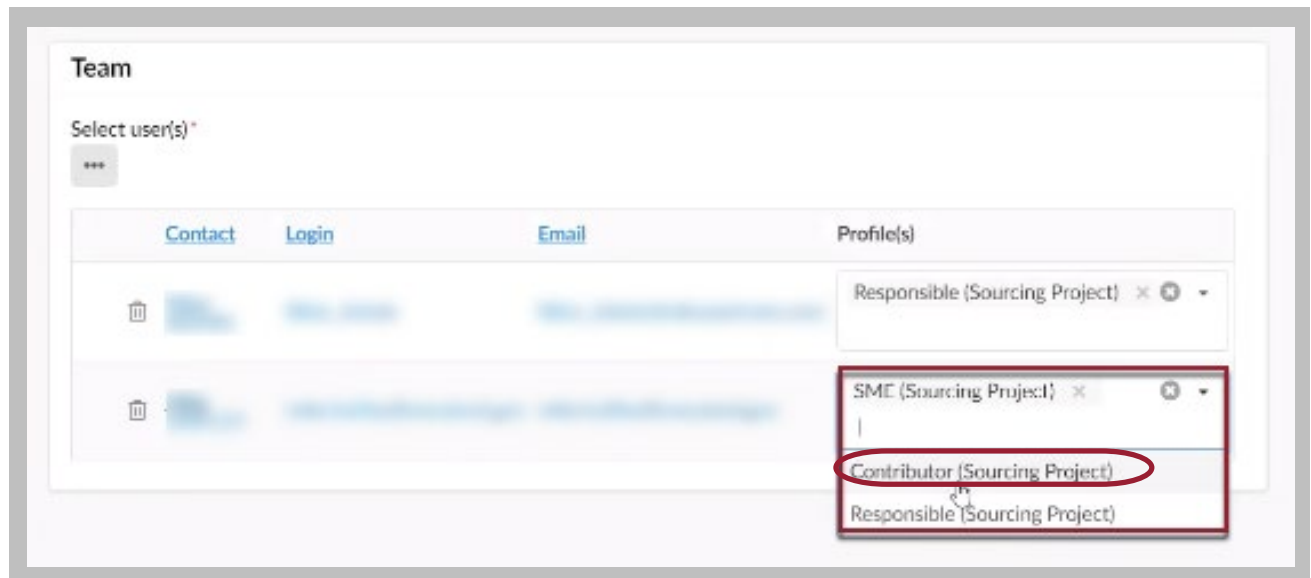
The screenshot shows the 'Browse Users' dialog box. It has a search bar with a red dashed box around it, a 'Type' dropdown set to 'Internal contact', a 'Filter by profile' dropdown, and a 'Vendor' dropdown. A red circle highlights the 'Search' button. Below the search bar, there are filters for 'Type: Internal contact' and 'Status: Active'. At the bottom, there is a table with columns for 'User', 'Email', and 'Organization'. The table contains several rows of user information, including 'Maryland Department of Transportation', 'Maryland General Assembly', and 'Stadium Authority'.

Establish Sourcing Project Team cont.

3. Click the individual by clicking the box next to their name; click the **X** to exit the screen or begin a new search to add additional members.



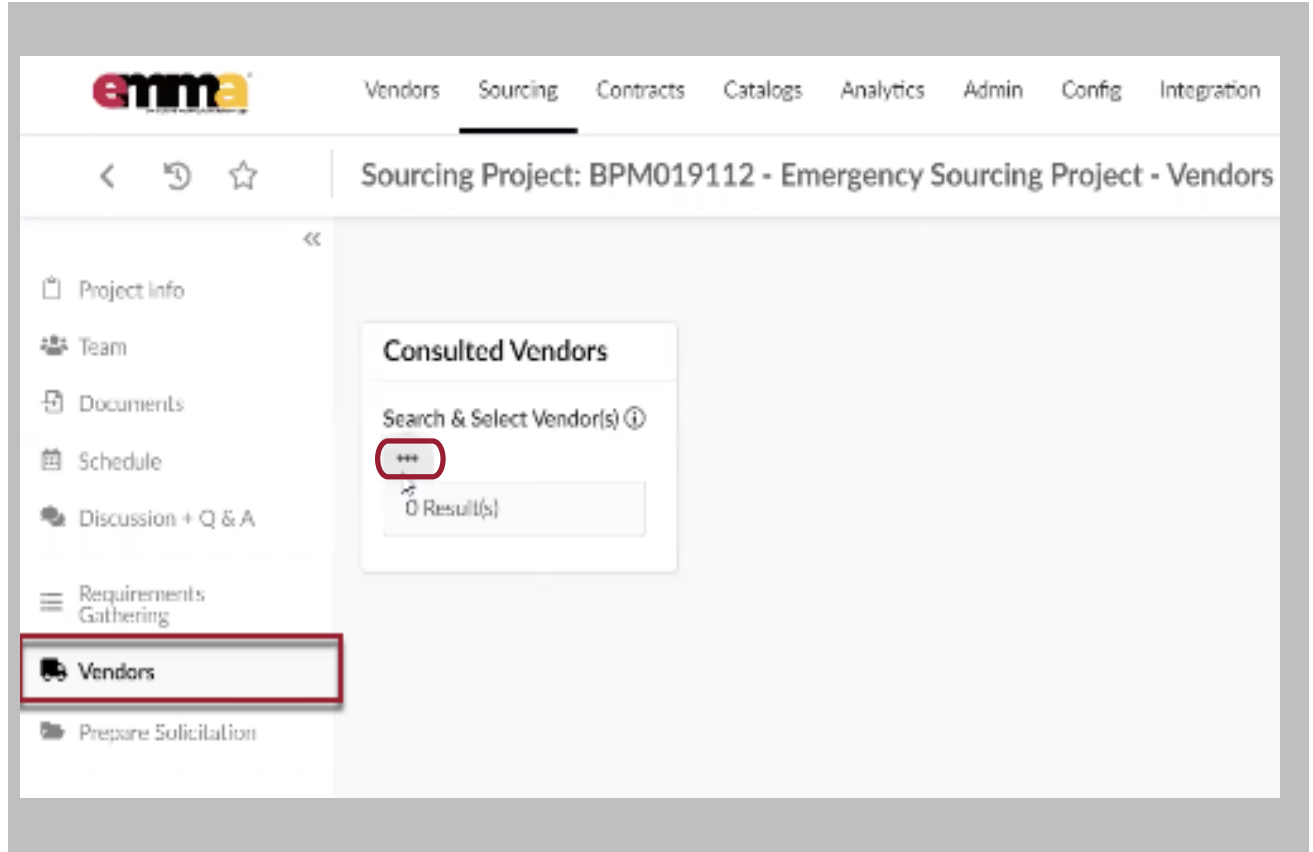
4. Once the Sourcing Team is clicked, assign the appropriate **Profile** for each member by clicking the dropdown arrow and clicking a role.



5. Click **Save** at the top of the screen once complete.

Consulted Vendors

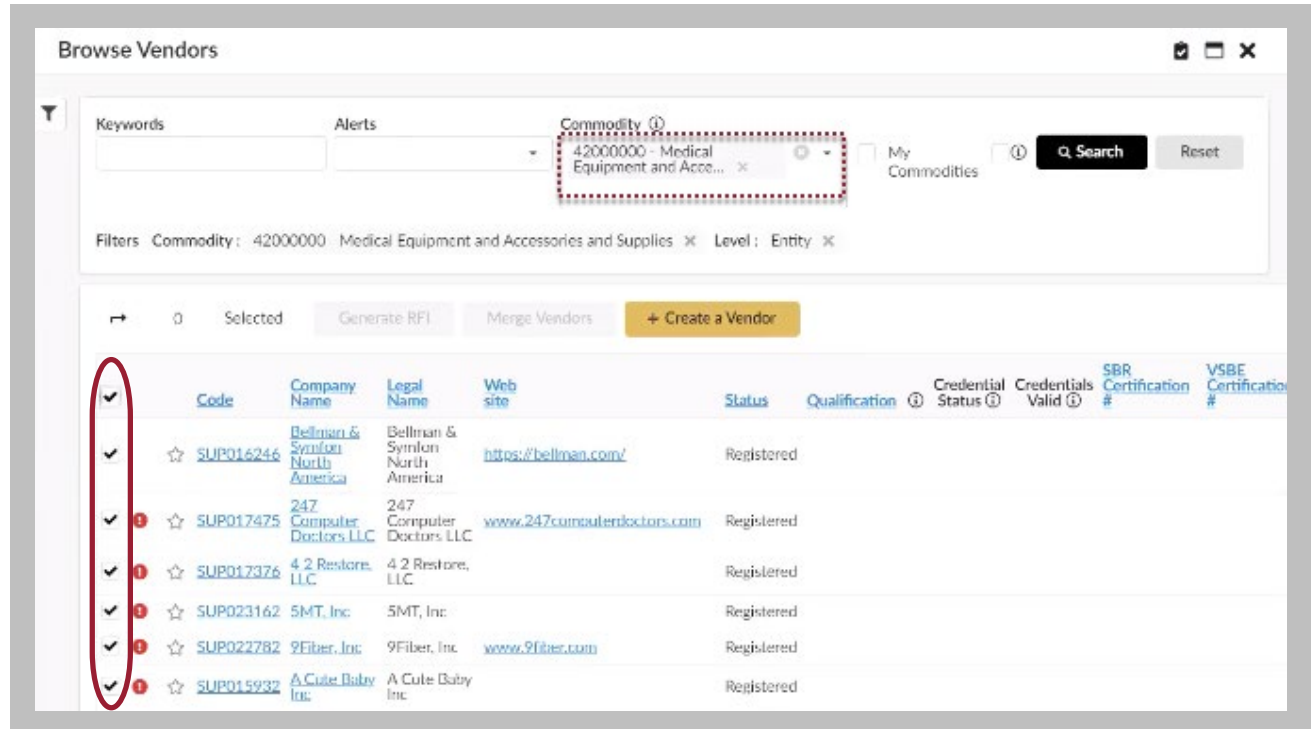
1. Click the **Vendors** section on the left side menu; click the **ellipsis** to add vendors.



The screenshot displays the eMMA web application interface. At the top, the navigation bar includes the eMMA logo and menu items: Vendors, Sourcing, Contracts, Catalogs, Analytics, Admin, Config, and Integration. Below this is a breadcrumb trail: < > Sourcing Project: BPM019112 - Emergency Sourcing Project - Vendors. On the left, a sidebar menu lists various project management options: Project Info, Team, Documents, Schedule, Discussion + Q & A, Requirements Gathering, **Vendors** (highlighted with a red box), and Prepare Solicitation. The main content area shows a 'Consulted Vendors' modal window. This modal has a title 'Consulted Vendors' and a search bar labeled 'Search & Select Vendor(s)'. Below the search bar is a red circle containing three dots (an ellipsis), which is the element to be clicked according to the instructions. Below the ellipsis is a text field showing '0 Result(s)'.

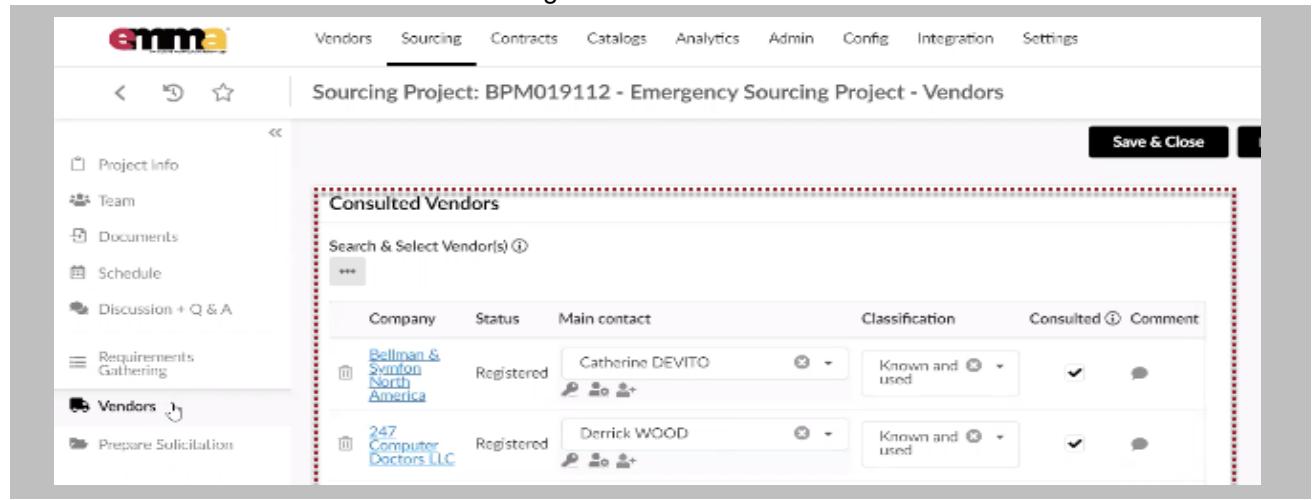
Consulted Vendors cont.

- Vendors are generated based on the commodity code clicked in the *General Information* portion of the Sourcing Project. At this initial point of draft preparation of the solicitation one vendor can be selected to proceed; later in the process (ref. Page 14) all vendors can be selected.



Code	Company Name	Legal Name	Web site	Status	Qualification	Credential Status	Credential Valid	SBR Certification #	VSBE Certification #
SUP016246	Bellman & Symton North America	Bellman & Symton North America	https://bellman.com/	Registered					
SUP017475	247 Computer Doctors LLC	247 Computer Doctors LLC	www.247computerdctors.com	Registered					
SUP017976	4 2 Restore, LLC	4 2 Restore, LLC		Registered					
SUP023162	SMT, Inc.	SMT, Inc.		Registered					
SUP022782	9Fiber, Inc.	9Fiber, Inc.	www.9fiber.com	Registered					
SUP015932	A Cute Baby Inc.	A Cute Baby Inc.		Registered					

- This will result in the clicked vendors being added to the list of *Consulted Vendors* for the solicitation.

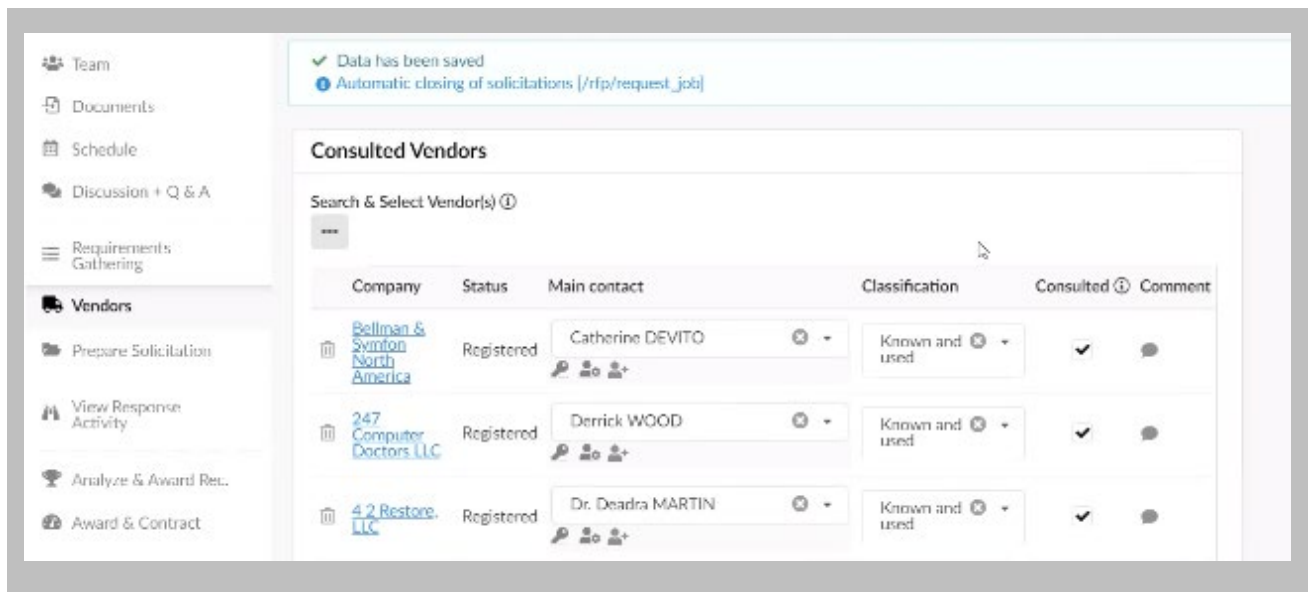


Company	Status	Main contact	Classification	Consulted	Comment
Bellman & Symton North America	Registered	Catherine DEVITO	Known and used	✓	
247 Computer Doctors LLC	Registered	Derrick WOOD	Known and used	✓	

Consulted Vendors cont.

- Review each vendor Contact (click the appropriate contact where multiples may be available); click or confirm the vendor Classification and check the Consulted box at the end of the line to confirm vendor solicitation.

NOTE: When there are multiple pages of Consulted Vendors ensure to check the vendor information on each page to ensure accuracy.



✓ Data has been saved
Automatic closing of solicitations [/rfp/request_job]

Consulted Vendors

Search & Select Vendor(s) ⓘ

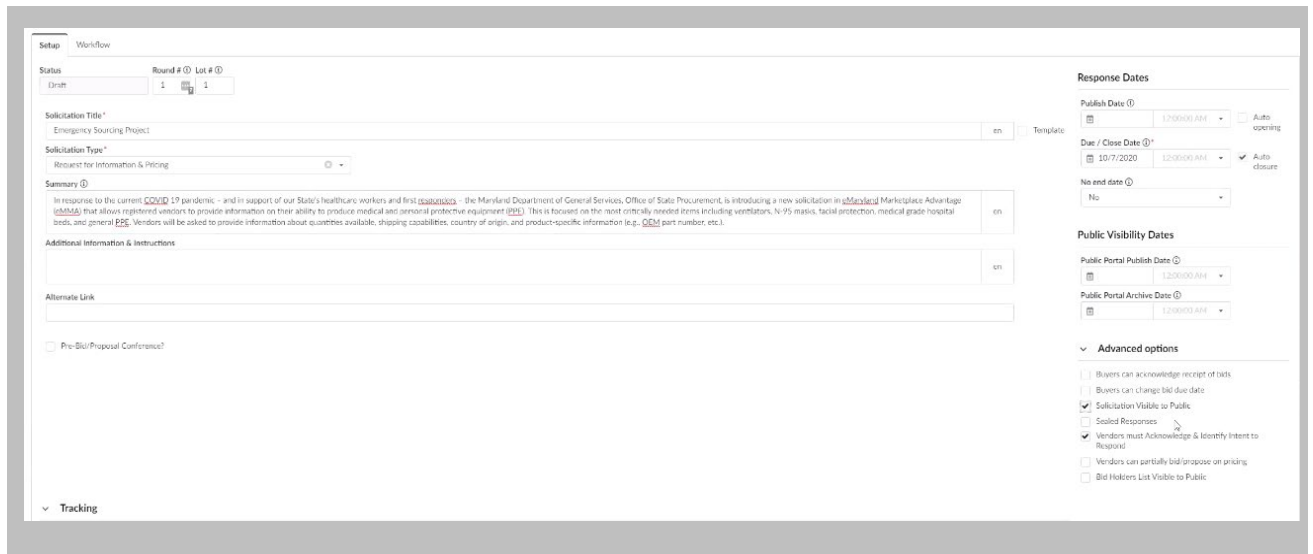
Company	Status	Main contact	Classification	Consulted ⓘ	Comment
Bellman & Symton North America	Registered	Catherine DEVITO 👤 👥 👤+	Known and used ⓘ	✓	🗨️
247 Computer Doctors LLC	Registered	Derrick WOOD 👤 👥 👤+	Known and used ⓘ	✓	🗨️
4 2 Restore LLC	Registered	Dr. Deadra MARTIN 👤 👥 👤+	Known and used ⓘ	✓	🗨️

- Click **Save** at the top of the screen once complete.

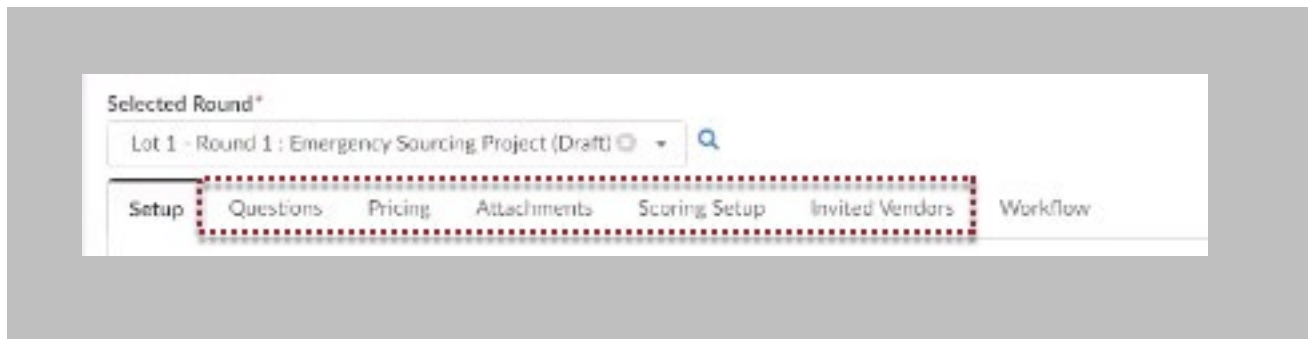
Prepare Solicitation: Setup

1. Click the **Prepare Solicitation** section on the left side menu.
2. Complete the **Setup** fields.
3. Click **Save** at the top of the screen once complete.

NOTE: By default the Solicitation Title is inherited from the Sourcing Project Name as indicated in the *General Information* section.



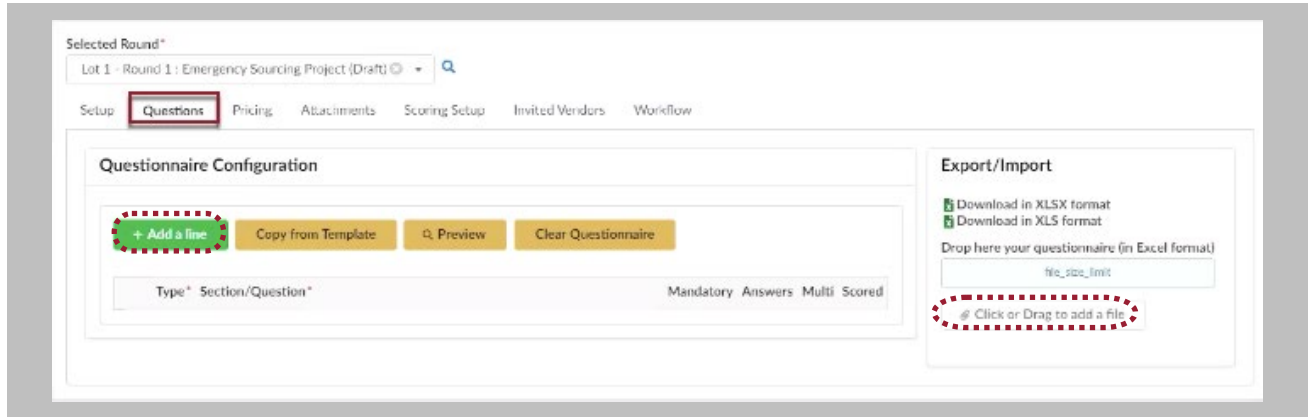
4. Click **Save** at the top of the screen once complete; this will activate the remainder of the configuration tabs for the solicitation.



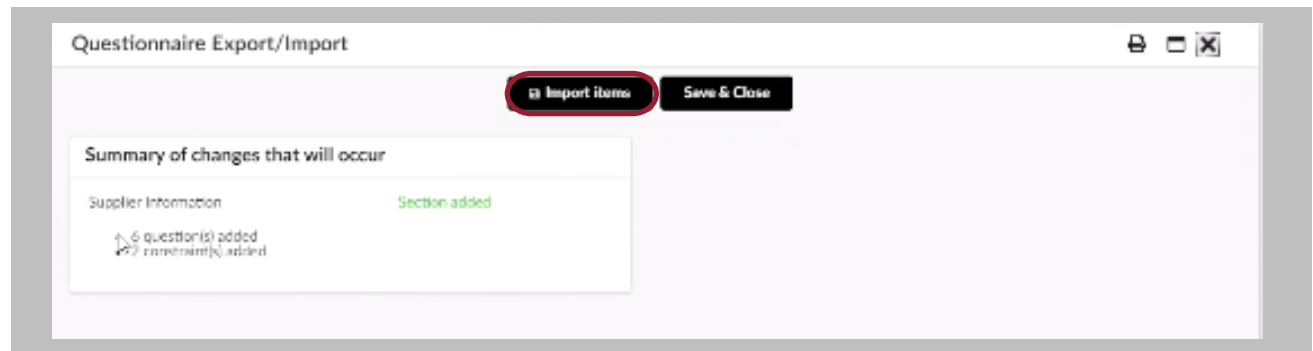
Prepare Solicitation: *Questionnaire Configuration*

NOTE: The Questionnaire functionality is optional to the solicitation and not required.

1. Click the **Questions tab** from the menu bar.



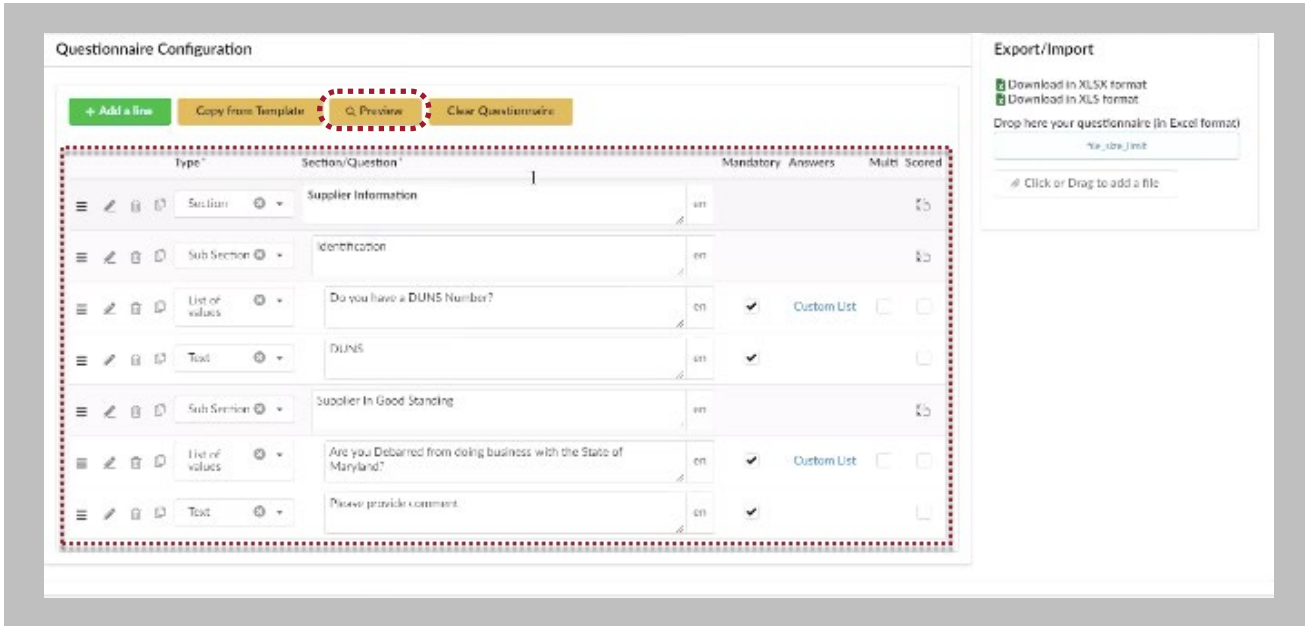
2. Questions can be manually added by clicking **Add a Line**; alternatively excel sheets containing templated data may be imported by clicking **Click or Drag to add a file**.
3. If a template is imported, review the Import Summary and click **Import Items**.



4. Upon import the Questions will automatically populate within the body of the *Questionnaire Configuration* portion of the screen.

Prepare Solicitation: Questionnaire Configuration cont.

5. Review the questions and edit or confirm all criteria as imported.

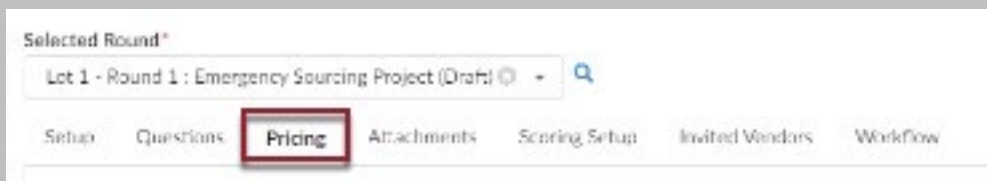


TIP: Click **Preview** to review the Questionnaire as it will be presented to vendors.

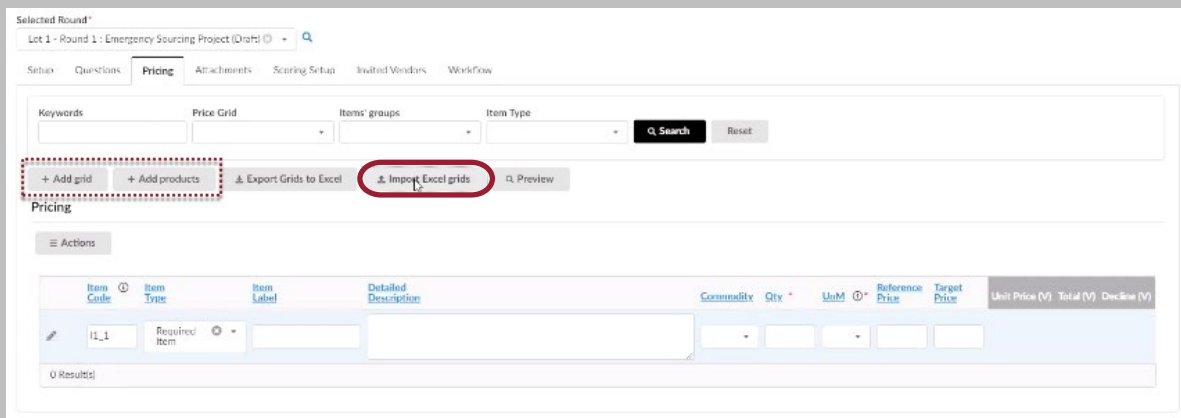
6. Click **Save** at the top of the screen once complete.

Prepare Solicitation: *Pricing Configuration*

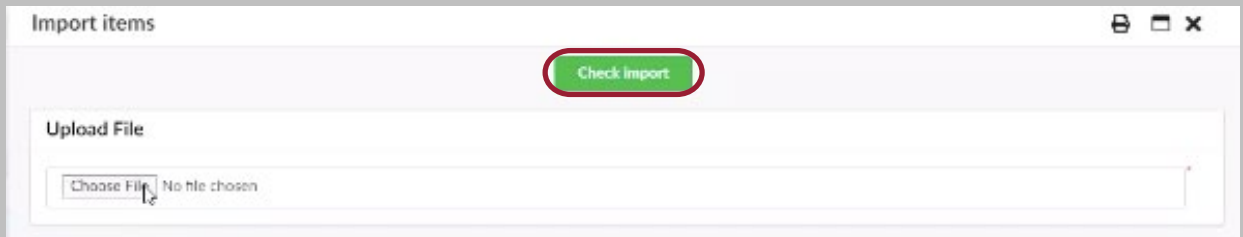
1. Click the **Pricing** tab from the menu bar.



2. Line items may be manually added by clicking **Add Grid** or **Add Products**; additionally this can be completed by **Importing Excel Grids** which we will use for this example.



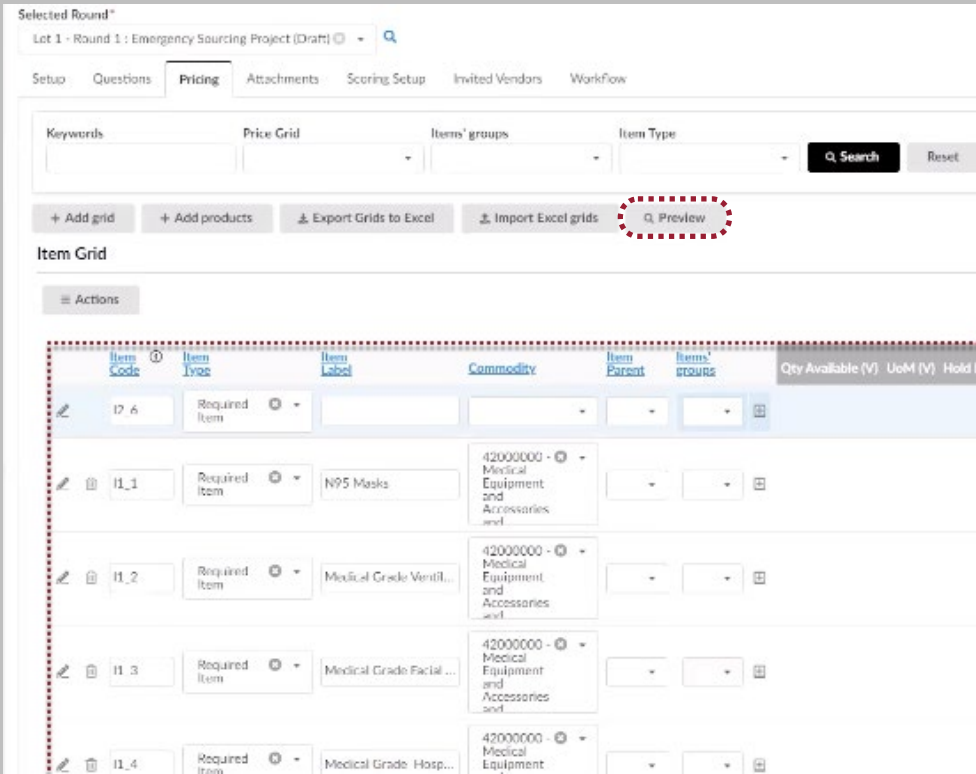
3. From the Import screen, browse and click the file and click **Check Import**.



4. Review the Import Summary and click **Import Items** to continue.

Prepare Solicitation: *Pricing Configuration*

5. Upon import the Pricing Grid will automatically populate within the body of the *Item Grid* portion of the screen.



Selected Round*

Lot 1 - Round 1 : Emergency Sourcing Project (Draft)

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

Keywords Price Grid Items' groups Item Type

+ Add grid + Add products Export Grids to Excel Import Excel grids

Item Grid

≡ Actions

Item Code	Item Type	Item Label	Commodity	Item Parent	Items' groups	Qty Available (V)	UoM (V)	Hold I
17_6	Required Item							
11_1	Required Item	N95 Masks	42000000 - Medical Equipment and Accessories and					
11_2	Required Item	Medical Grade Ventil...	42000000 - Medical Equipment and Accessories and					
11_3	Required Item	Medical Grade Facial ...	42000000 - Medical Equipment and Accessories and					
11_4	Required Item	Medical Grade Hosp...	42000000 - Medical Equipment					

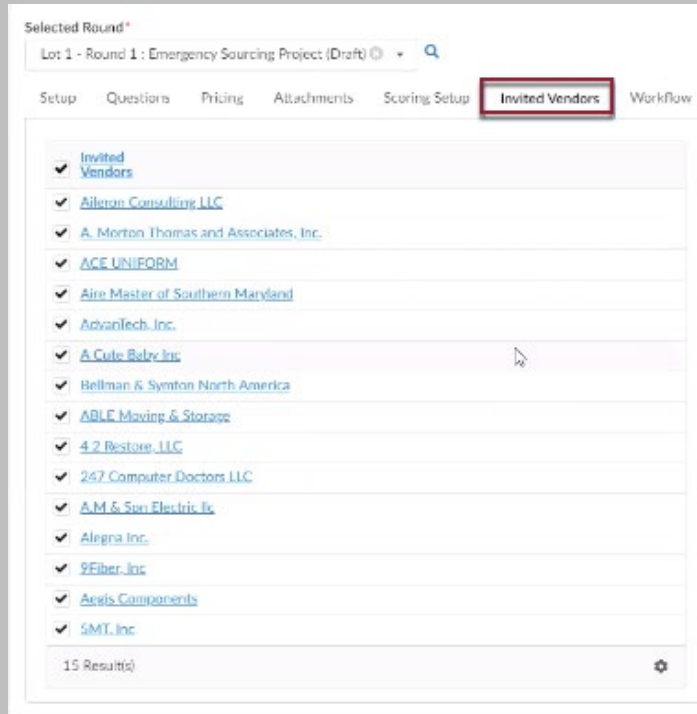
6. Review the items and edit or confirm all criteria as imported.

TIP: Click **Preview** to review Pricing as it will be presented to vendors.

7. Click **Save** at the top of the screen once complete.

Prepare Solicitation: *Invited Vendors*

1. Click the **Invited Vendors** tab from the menu bar.
2. Review the list of Invited Vendors to participate in the solicitation; ensure all boxes of desired participants are checked. If only one vendor was previously selected (ref. Page 6) now is the time to select all participants.



3. Click **Save** at the top of the screen once complete.

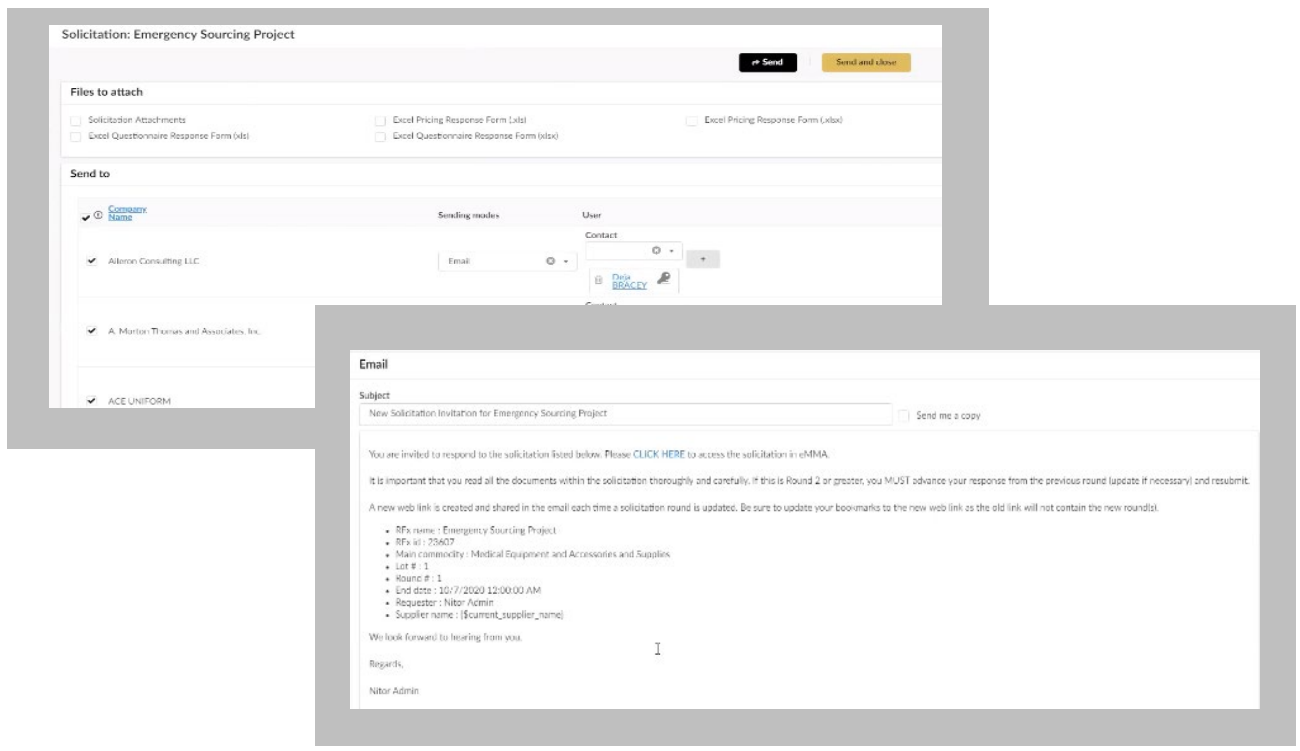
Notify Commodity Vendors

- As best practice review all solicitation information, specifically:
 - Setup Tab: Response Dates, Public Visibility Dates and Advanced Options
 - Questions Tab
 - Pricing Tab
 - Invited Vendors Tab
- At the top of the page, click **Notify Commodity Vendors**; this will send a notification to vendors within eMMA.



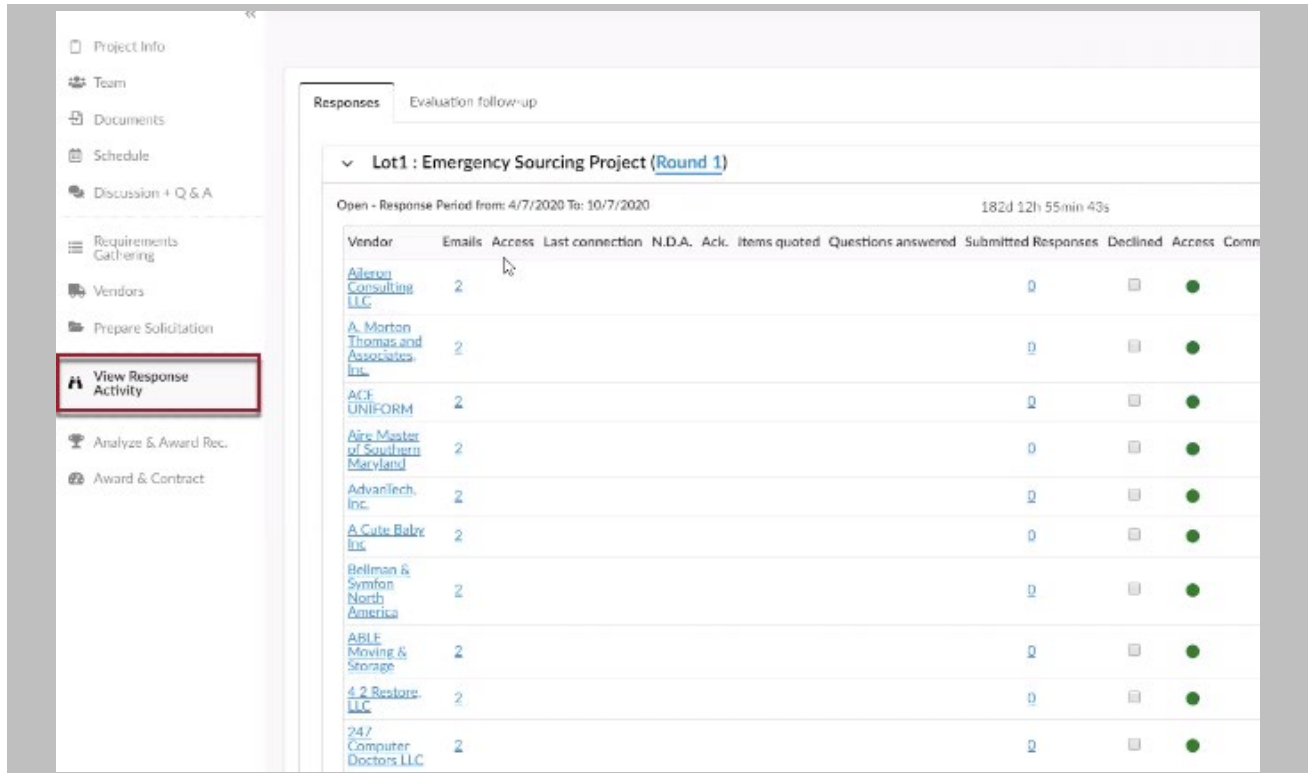
Send Solicitation

- Now click **Send**, at the top of the page.
- The pop-up box will supply a vendor distribution list based on the clickions in the *Invited Vendors* configuration tab. At the bottom of the pop-up is the actual email which will be sent to the invited vendors, this includes a direct link to the solicitation on eMMA.
- Click **Send and Close** to complete the email notification process to the solicitation.



View Response Activity

To monitor vendor response activity to the solicitation; click **View Response Activity** section on the left side menu. The following dashboard view of vendor engagement will populate.



Responses Evaluation follow-up

Lot 1 : Emergency Sourcing Project (Round 1)

Open - Response Period from: 4/7/2020 To: 10/7/2020 182d 12h 55min 43s

Vendor	Emails	Access	Last connection	N.D.A. Ack.	Items quoted	Questions answered	Submitted Responses	Declined	Access	Comments
Aileron Consulting LLC	2				0		0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
A. Morton Thomas and Associates, Inc.	2				0		0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ACE UNIFORM	2				0		0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Aire Master of Southern Maryland	2				0		0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Advantech, Inc.	2				0		0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
A Cute Baby, Inc.	2				0		0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Bellman & Symon North America	2				0		0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ABLE Moving & Storage	2				0		0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
4 2 Restore, LLC	2				0		0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
24/7 Computer Doctors LLC	2				0		0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	