Creating Large Procurement IFB Sourcing Solicitation

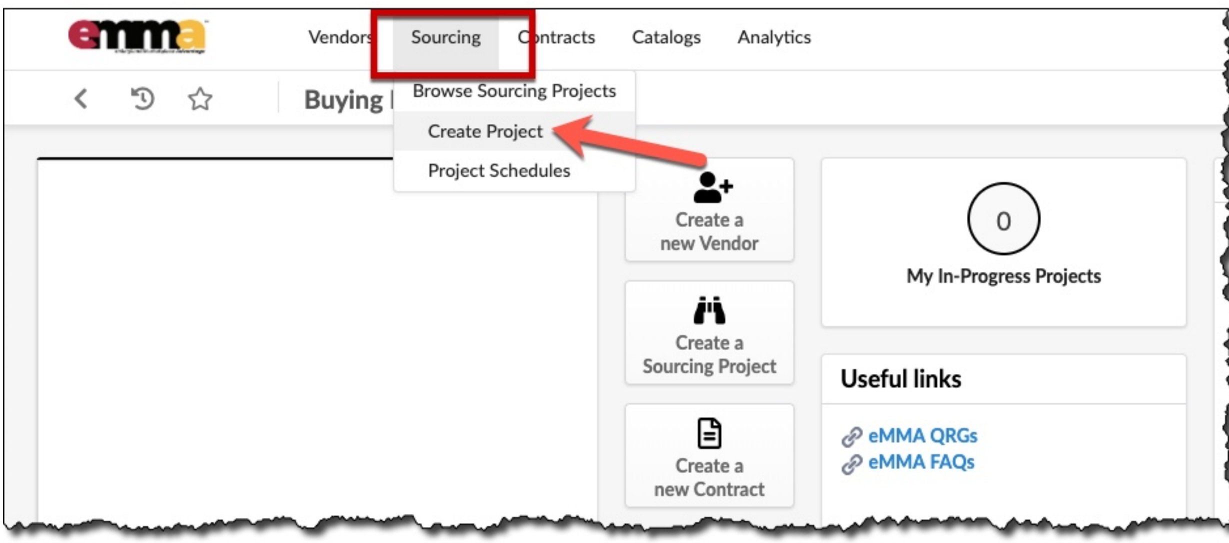
eMMA Quick Reference Guide

OVERVIEW

This Quick Reference Guide (QRG) is designed to help you (*Procurement Officers & Buyers*) understand how to create large Procurement *Information for Bid* (IFB) Sourcing Projects in eMaryland Marketplace Advantage (eMMA).

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.

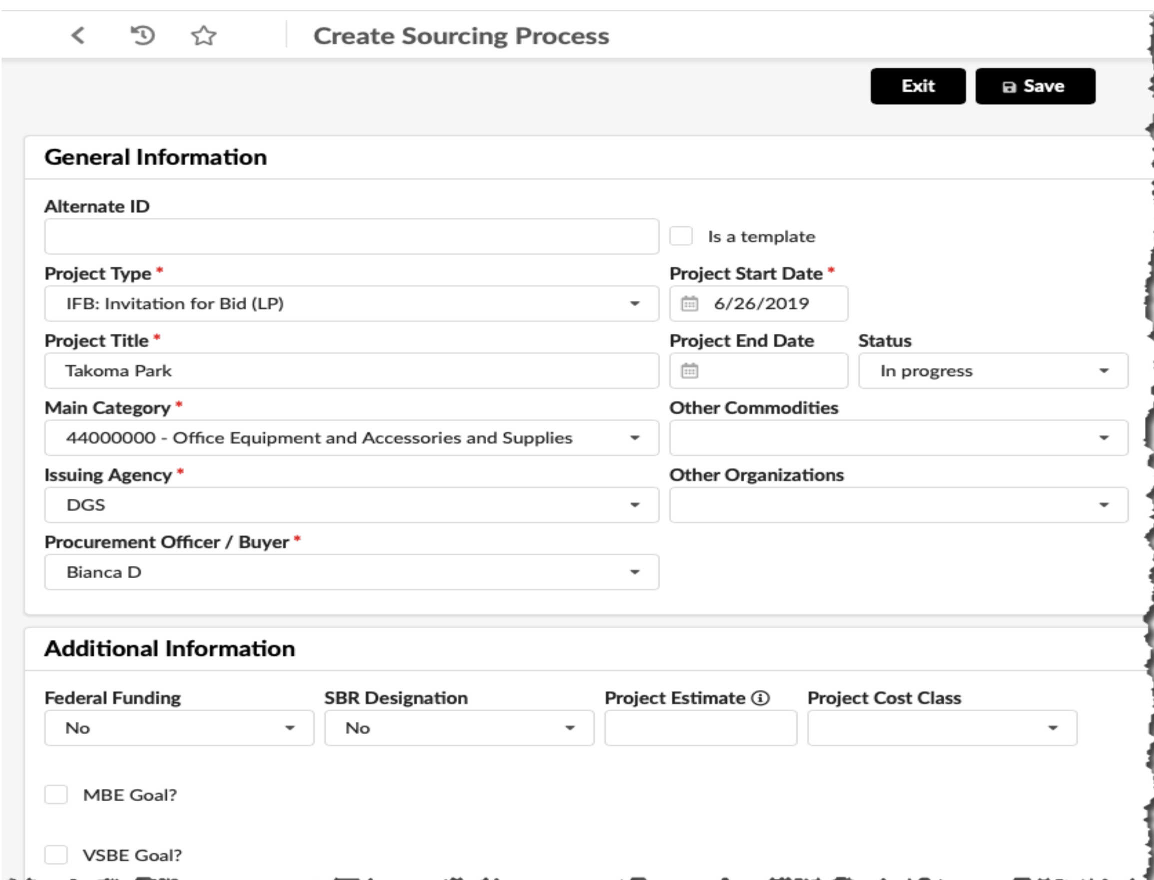


SECTION 2: General Information

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

Complete the required fields as indicated:

4. **Project Type:** *Select the **IFB** (Information for Bid) option from the drop-down menu*
   NOTE: *The IFB solicitation type is public and sealed. This solicitation type will allow for minimum qualification criteria to be flagged and disqualify bidders if they do not meet those criteria.*
5. **Project Title:** *Enter an appropriate title for the Sourcing Project*
6. **Main Category:** *Select a category from the drop-down or click "See All" to search commodities*
7. **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*
8. **Procurement Officer / Buyer:** *Enter the name of the Procurement Officer / Buyer of the IFB Sourcing Project*
9. **Project Start Date:** *Enter the Project Start date*
10. Once the required criteria is complete, click the "**Save**" button at the top of the screen.



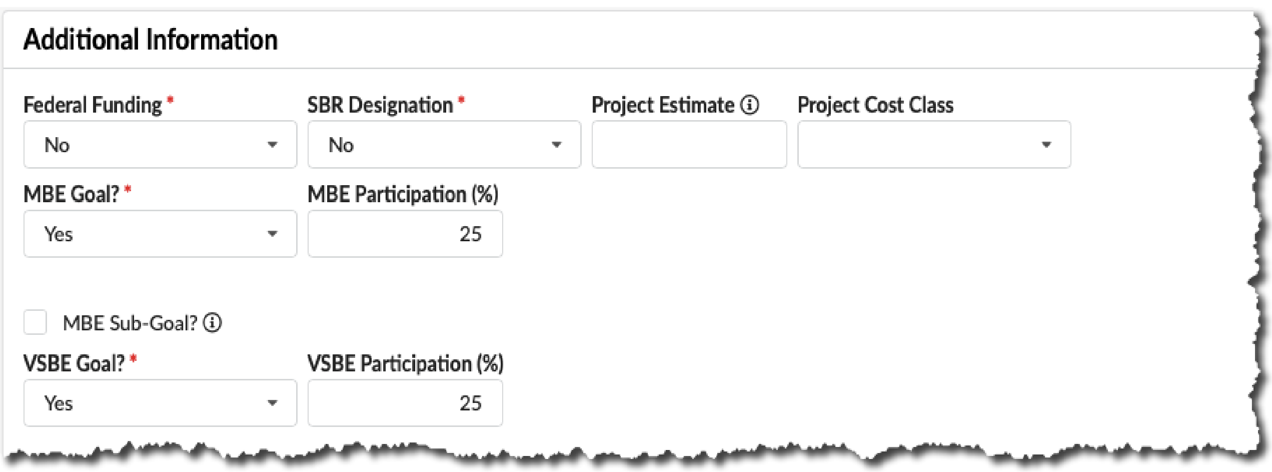
SECTION 3: Additional Information

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

Complete the required fields as indicated:

11. **Federal Funding:** *Indicate the status of the* ***Federal Funding***
12. **SBR Description:** *Enter the* ***Small Business Reserve*** *description*
13. **MBE Goal:** *Indicate the* ***Minority Business Enterprise*** *Goal Status*
14. **VSBE Goal:** *Indicate the* ***Veteran-Owned Small Business Enterprise*** *Goal Status*

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



emma
eMaryland Marketplace *Advantage*

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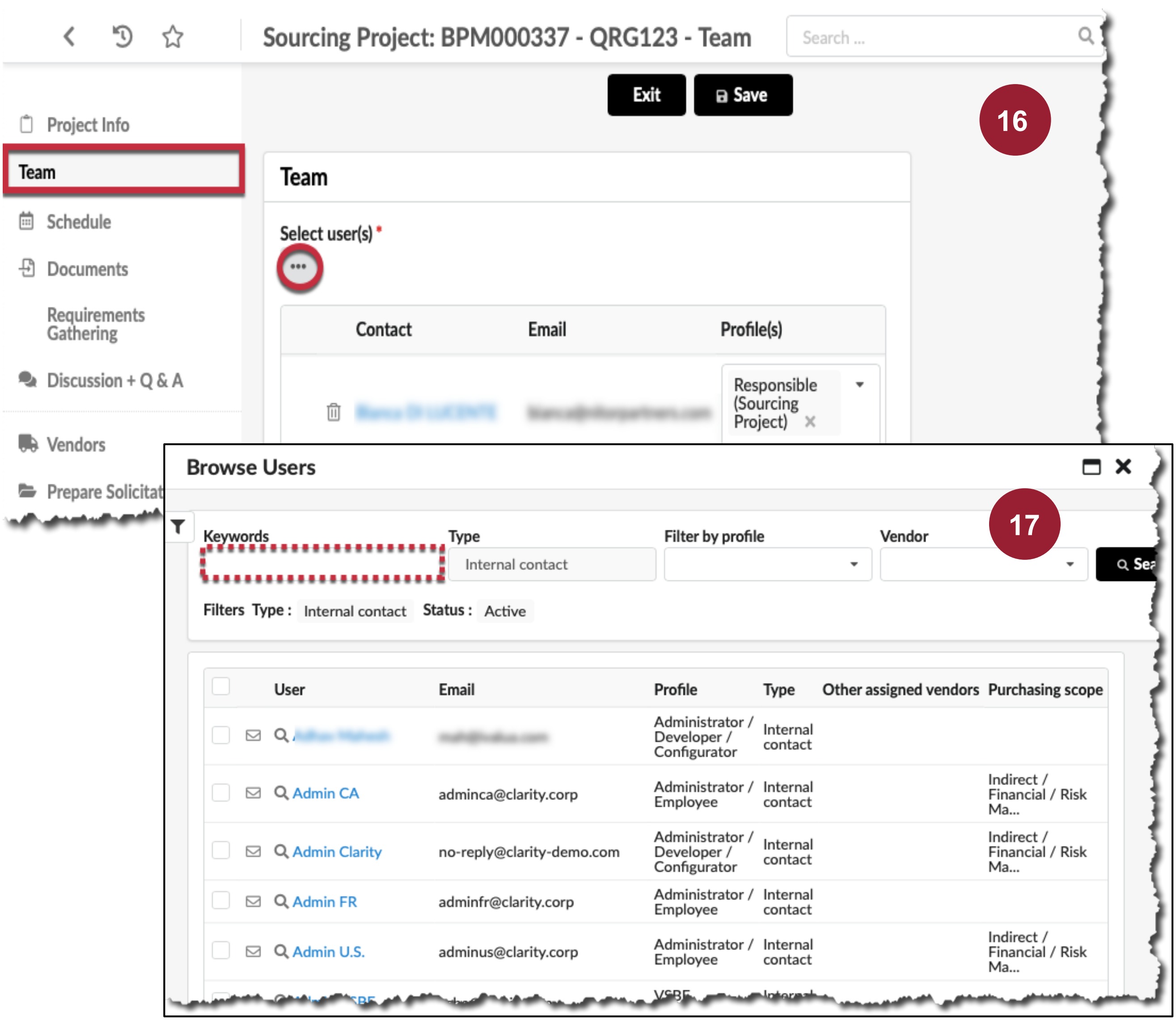
SECTION 4: Create a Team

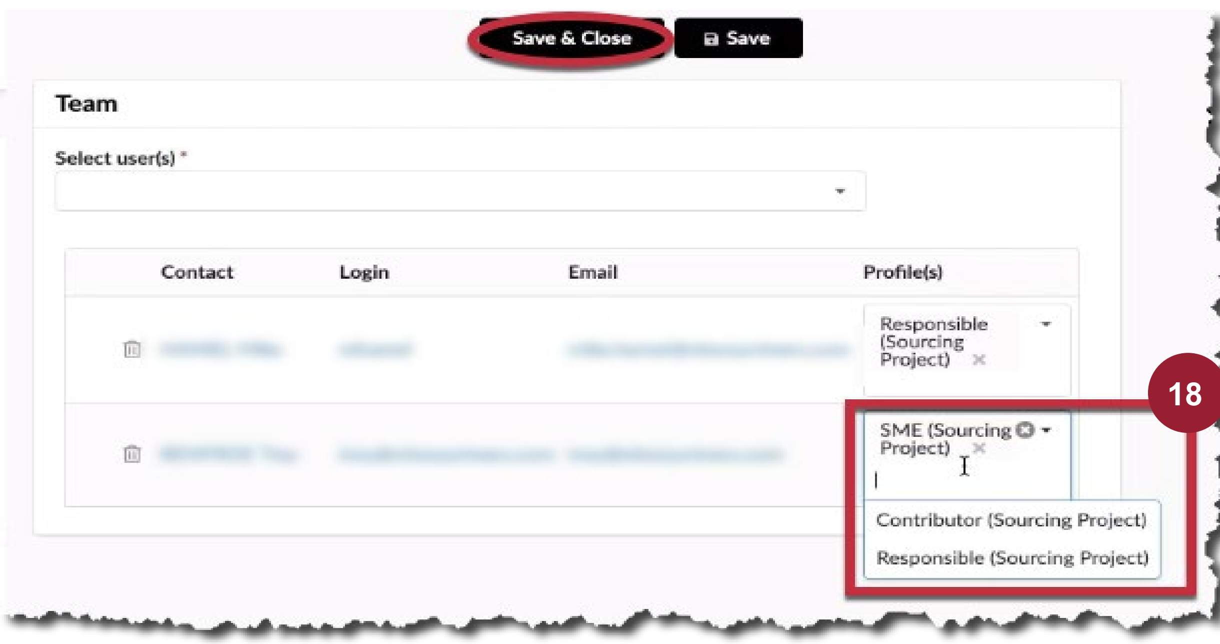
The Owner of the Sourcing Project may choose to create a **Team** for the specific event to drive transparency and collaboration through out the process.

16. Select the **“Team”** step from the menu bar on the left side of the screen; click the “**three-dot”** button to add team members.
17. 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.)

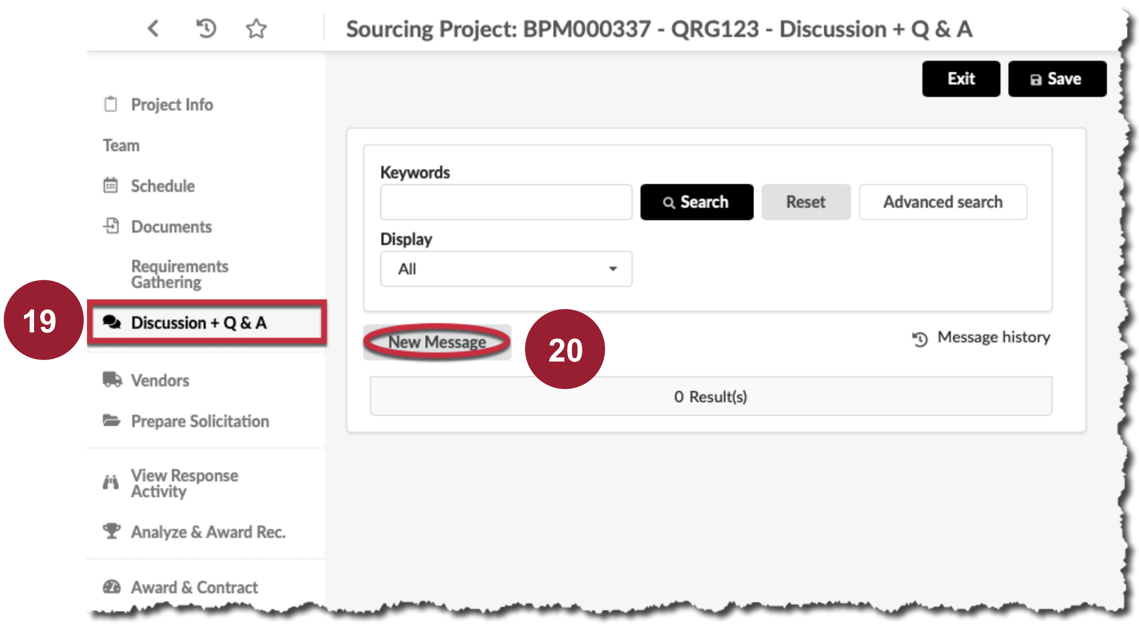
18. After the team members are added; select their role as either a **SME (***Subject Matter Expert*), **Contributor or Responsible** profile:
    - **SME:** *The SME acts with the authorization of hands on active "helper" role; note this is the default team role when a new member is selected.*
    - **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.*



SECTION 5: 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.

19. Select the **"Discussion + Q & A "** step from the menu bar on the left side of the screen
20. Click the **"New Message"** button to initiate a new message



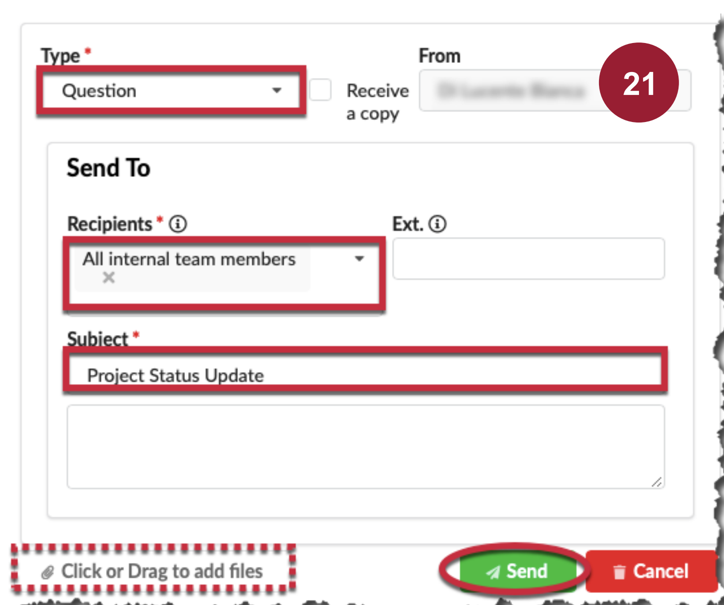
NOTE: *All fields marked with a red asterisk to the right are required and must be completed to proceed.*

21. 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 to messages by clicking or dragging where indicated in the lower left corner**

<ins>**NOTE**: Always click "**Save**" to continue.</ins>

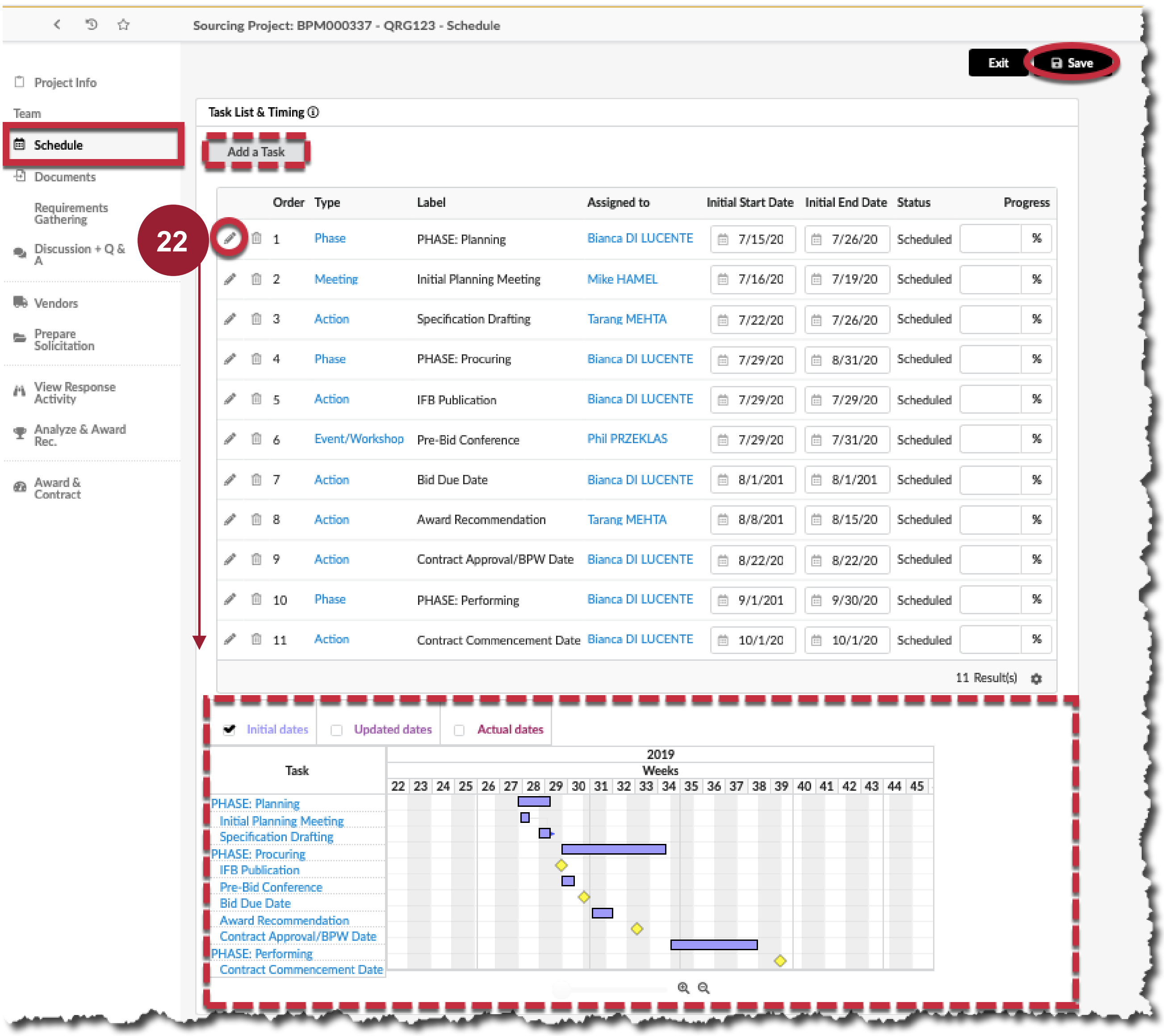


SECTION 6: Create a Sourcing Project Schedule

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

22. Review the templated schedule ***Phases, Meetings, Actions & Events***
23. The Task line items may be edited by clicking the **pencil icon** on the left side of the of the column; continue to the next page of this guide to learn how to edit Tasks

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



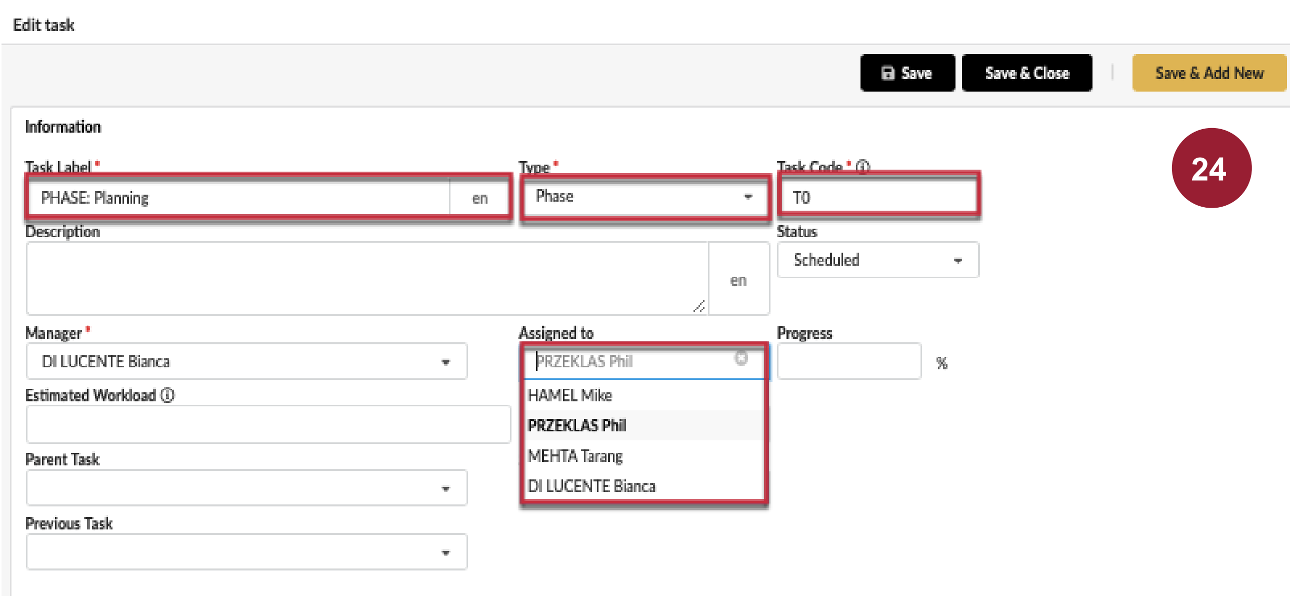
SECTION 6: Create a Sourcing Project Schedule – Editing Tasks

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 to proceed.*

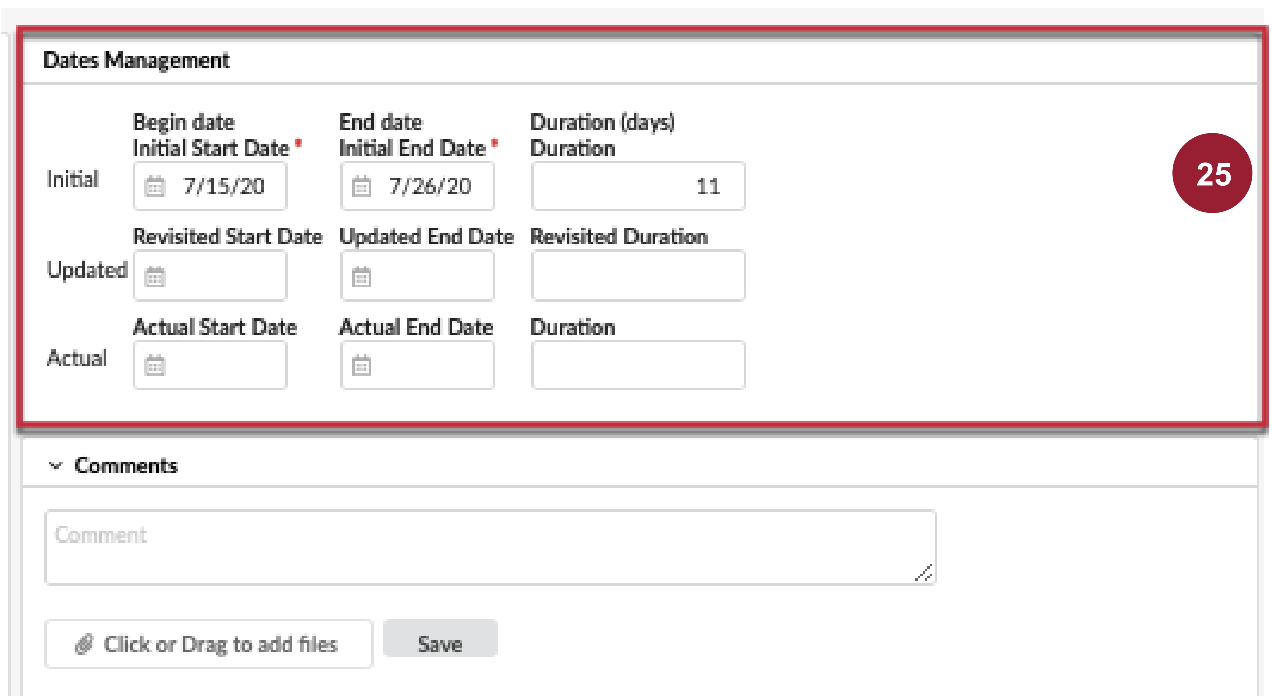
24. Review the **Task Information** fields:
    - **Task Label:** *Enter a clear and concise Task Label; additional details may be captured in the **Description** box*
    - **Type:** *Select the appropriate option from the drop-down menu (ex. Phase, Meeting, Action)*
    - **Task Code:** *This field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

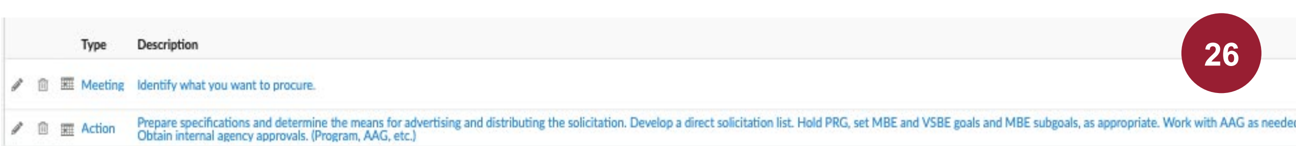


SECTION 6: Create a Sourcing Project Schedule – Editing Tasks (cont.)

25. 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*



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

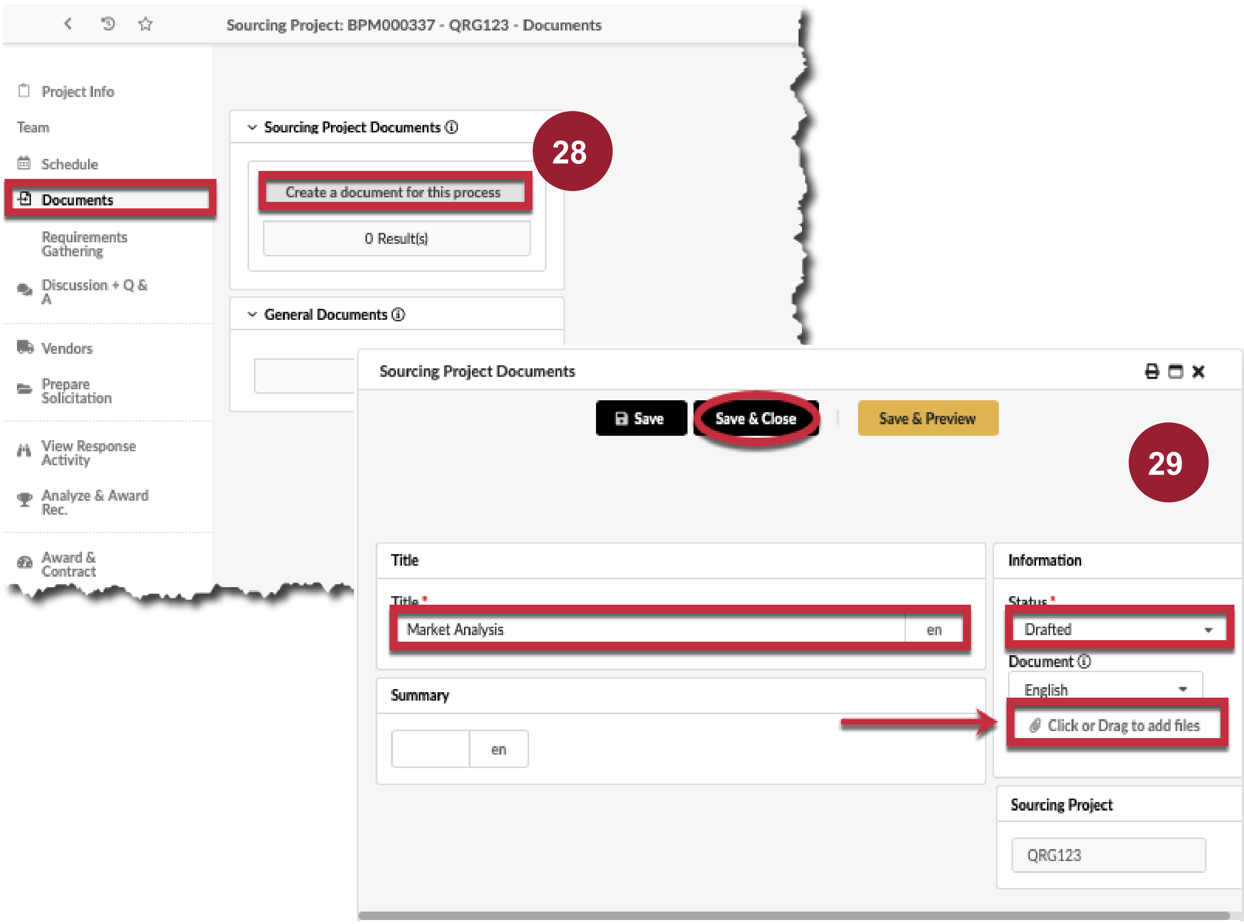


27. Click the **"Save & Close"** button at the top of the screen to incorporate all edits and return to the **Schedule** home screen.

SECTION 7: Add Documents

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

28. Click the **"Crate a document for this process"** button to add a document to the Sourcing Project.



29. 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

30. Click the **"Save & Close"** button at the top of the screen to incorporate all edits and return to the **Documents** home screen

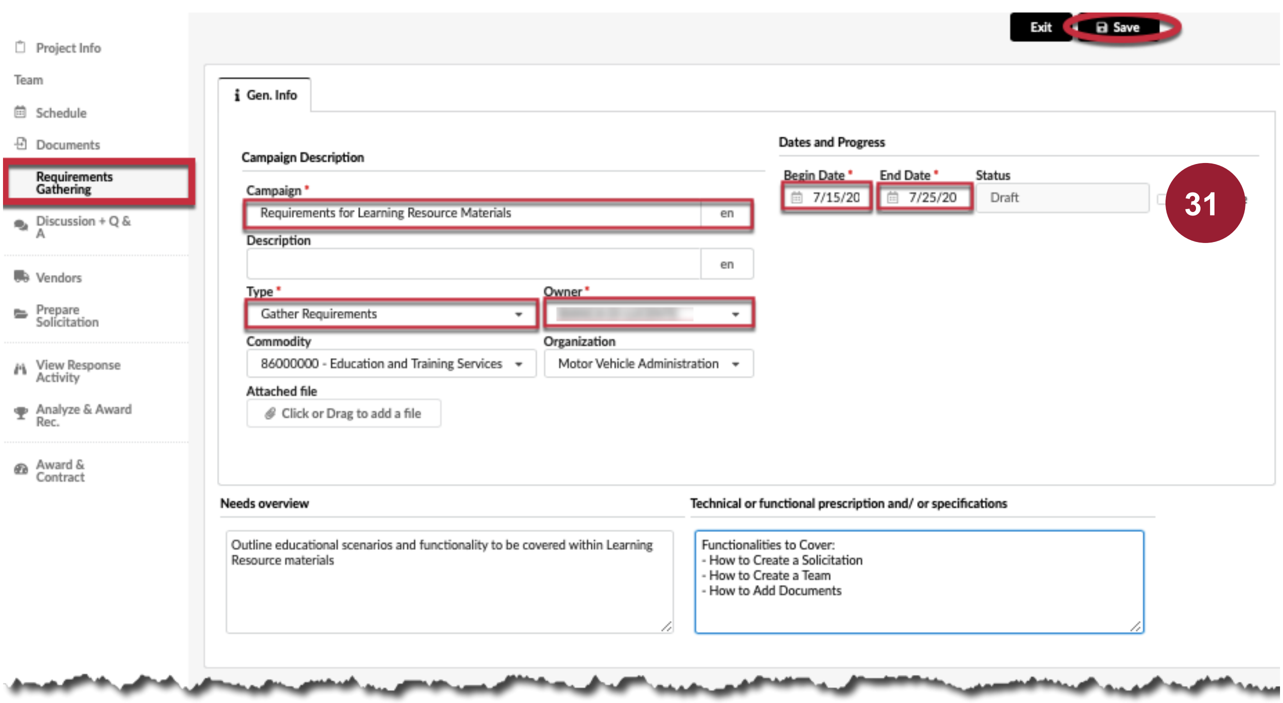
NOTE: *The Documents added to this section are only visible by the internal team to the Sourcing Project. This is an appropriate place to store and share to internal team members such as market analysis, research, etc.*
These or other documents can be copied to the solicitation and shared with vendors,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

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.

31. 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*



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

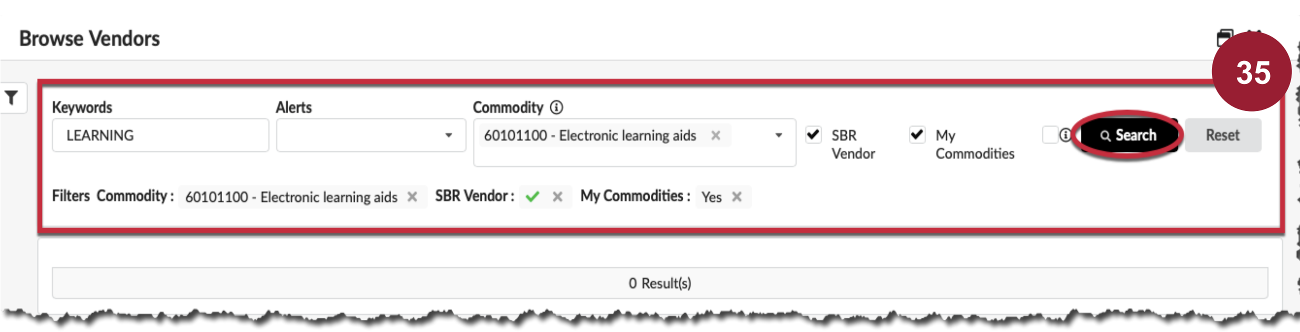
SECTION 9: Select Vendors

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 IFB Sourcing Project based on identified criteria and requirements.

33. Select the **"Vendors"** step from the menu bar on the left side of the screen.
34. 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 to proceed.*

35. 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 IFB Sourcing Project.



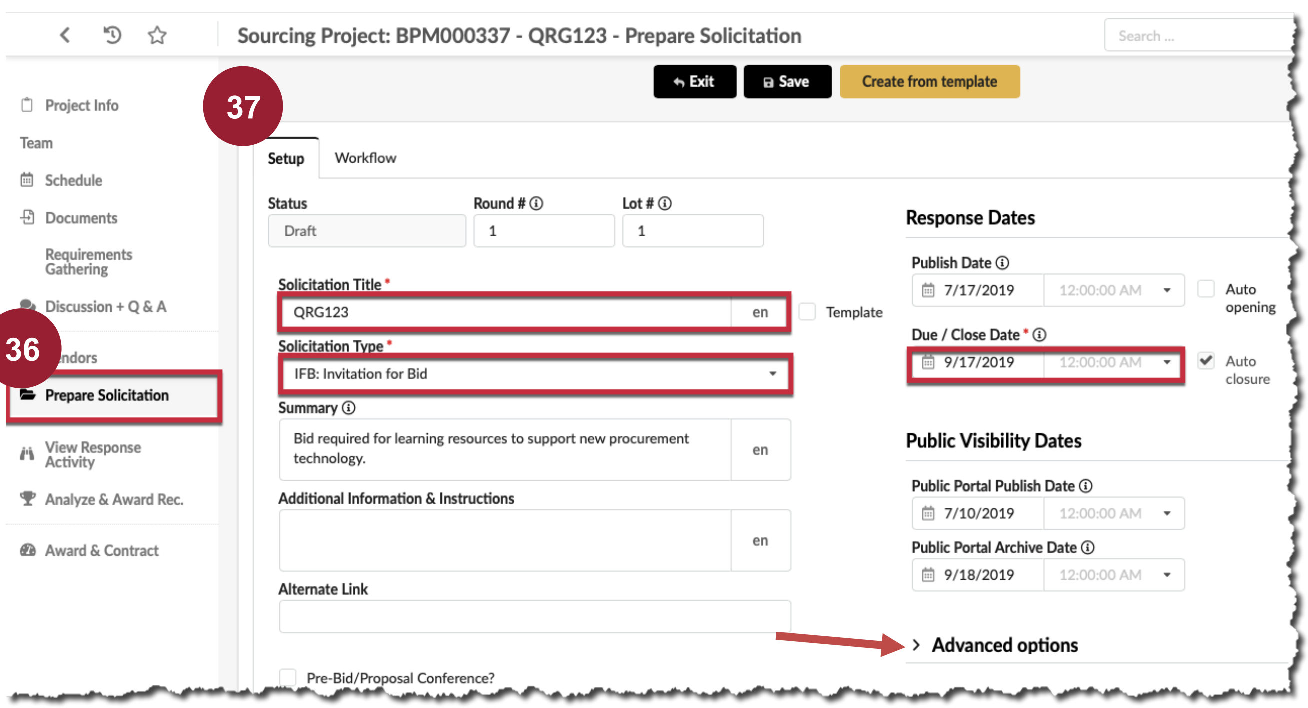
IMPORTANT: For solicitations that require a longer period of time, the list of vendors receiving notifications may need to be updated/refreshed to capture newly registered vendors for a specific category code.

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 IFB Sourcing Project solicitation.

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

36. Select the **"Prepare Solicitation "** step from the menu bar on the left side of the screen.
37. Enter the required criteria to complete the **Solicitation** form:
    - **Solicitation Title:** *Enter an appropriate Solicitation Title for the Sourcing Project*
    - **Solicitation Type:** *For this scenario select the **IFB** Information for Bid option; for Minimum Qualification Solicitations, select the Min Quals IFB option from the **Solicitation Type** drop-down menu.*
    - **Due / Close Date:** *Enter the date when Bidders/Vendors when can no longer submit responses.*
    - *Under the **Advanced Options:** This is where you can **s**elect to show the <u>bid holders</u>.*

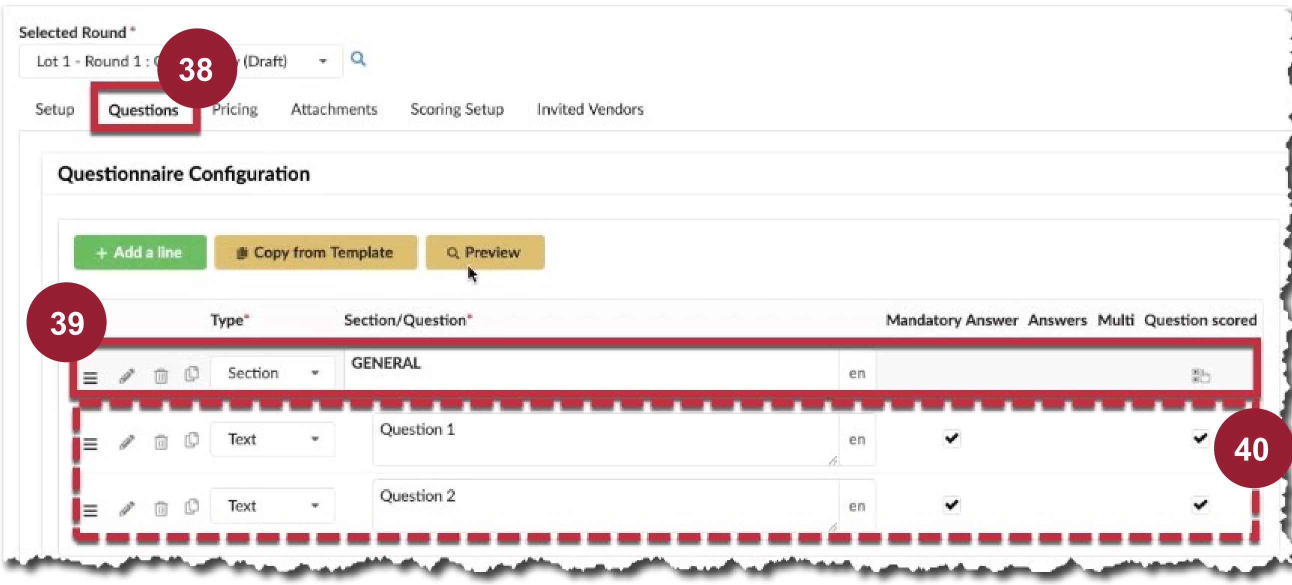


NOTE: The **Public Visibility Date** enables the Solicitation to be viewed prior to opening the response window time if desired

SECTION 10: Prepare Solicitation - Questions

38. Within the **Prepare Solicitation** step, select the **Questions** tab from the top of the screen.
39. Create a **"Section"** to categorize a set of Questions.
40. Enter the required Questions as appropriate, to each section of the IFB solicitation
    - When entering the Questions, be sure to check the **"Question scored"** box to enable the scoring functionality for that line item.

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

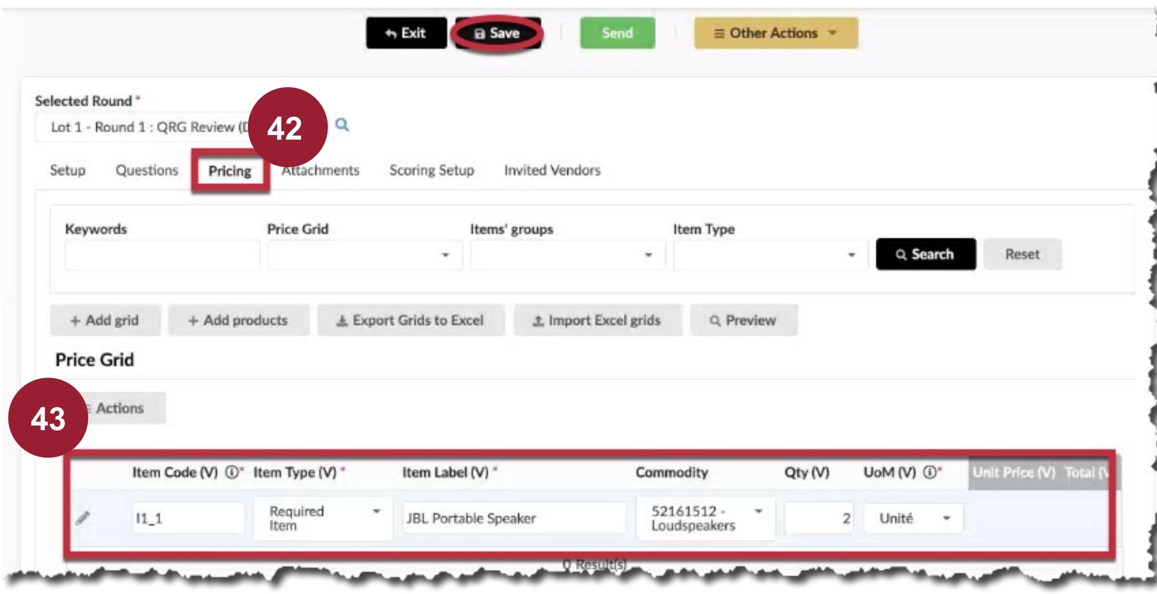


41. Once the required criteria is complete, click the "**Save**" button at the top of the screen.

SECTION 10: Prepare Solicitation - Pricing

42. Within the **Prepare Solicitation** step, select the **Pricing** tab from the top of the screen.
43. Create a line item within the **Pricing Grid** for each item for bid.

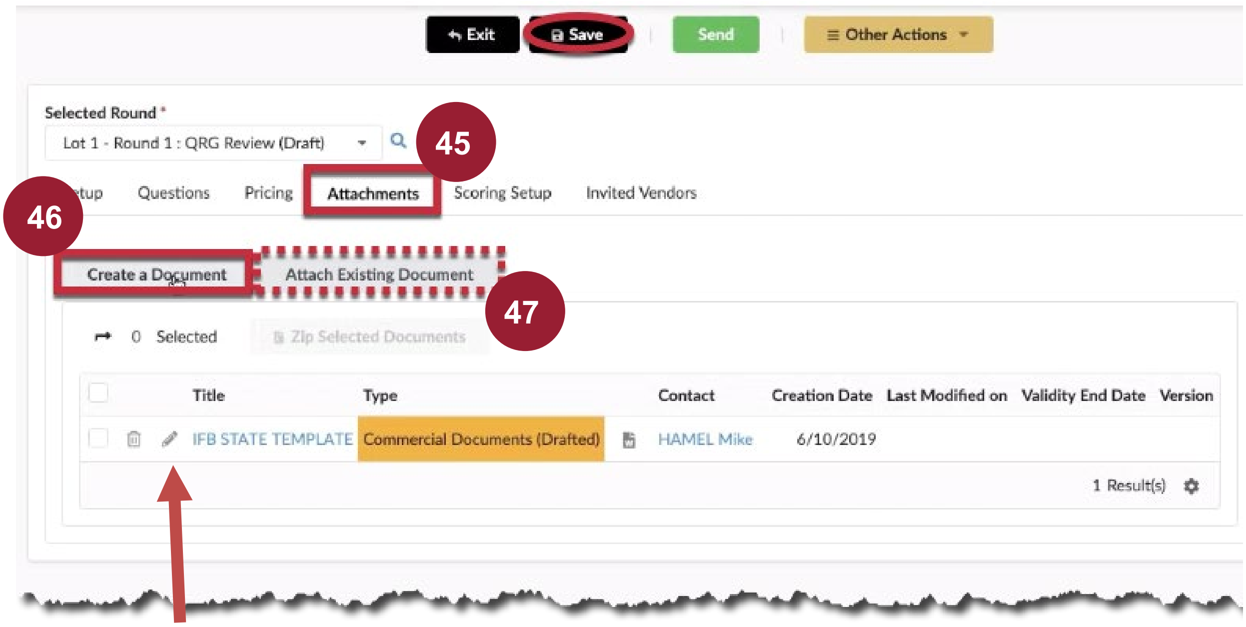
NOTE: *Pricing Grid columns marked with a **(V)** are visible to the vendor once the solicitation is public. These controls can be changed by right clicking on the column headers > column settings.*
*Additionally, a preview of the Pricing Grid can be viewed by clicking the **Preview** button.*



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

SECTION 10: Prepare Solicitation - Attachments

45. Within the **Prepare Solicitation** step, select the **Attachments** tab from the top of the screen.
46. Click the **"Create a Document"** button to add a net new document to the solicitation.
47. Alternatively by clicking **"Attach Existing Document";** a document from the **"Documents"** step may be selected and attached to this portion of the IFB project.



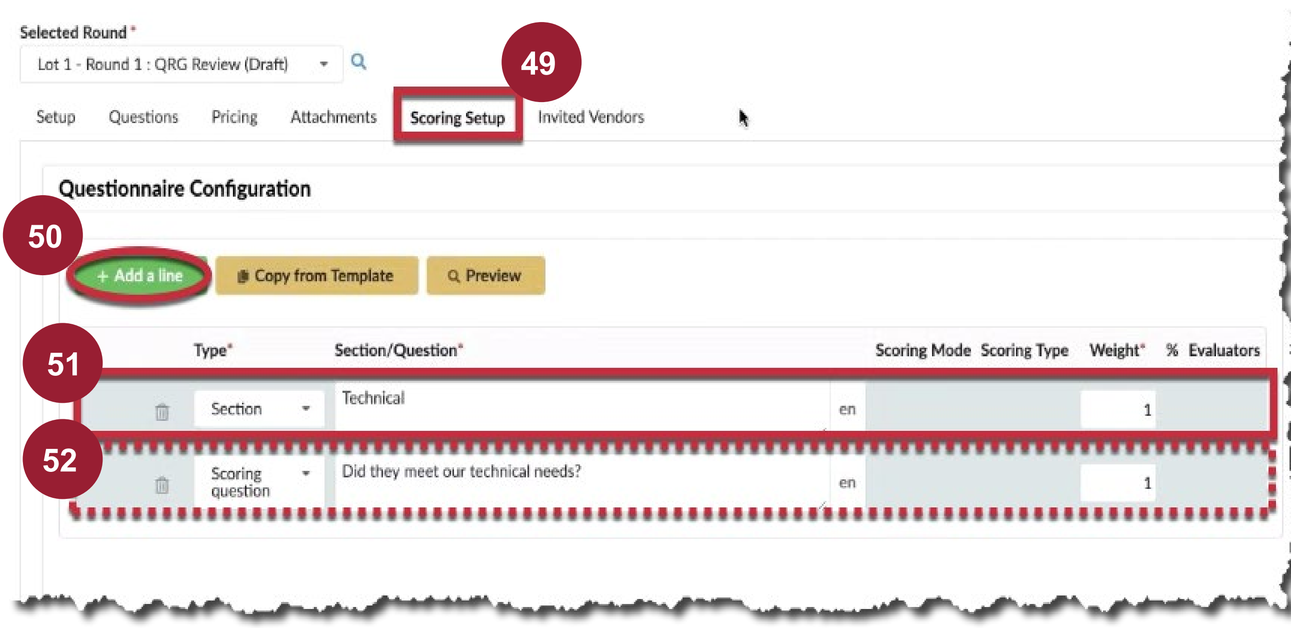
NOTE: *Documents in DRAFT status type (as seen in gold) will not be visible to vendors.*
*Documents must be in an **Approved** status type in order to be viewed by vendors.*
The status type can be edited by clicking the line item pencil icon and selected "Approved" from the Status selection drop-down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

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

SECTION 10: Prepare Solicitation – Scoring Setup

49. Within the **Prepare Solicitation** step, select the **Scoring Setup** tab from the top of the screen.
50. Click the **"Add a line"** button to add a new scoring requirement.
51. Enter the required Scoring criteria by creating appropriate section (ex. Technical).
52. Create the **Scoring Questions** by adding a line item > Type: Scoring Question; under the appropriate **Scoring Section.**

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



53. Select the **Scoring Mode, Type and Weight** based on the nature of the Question

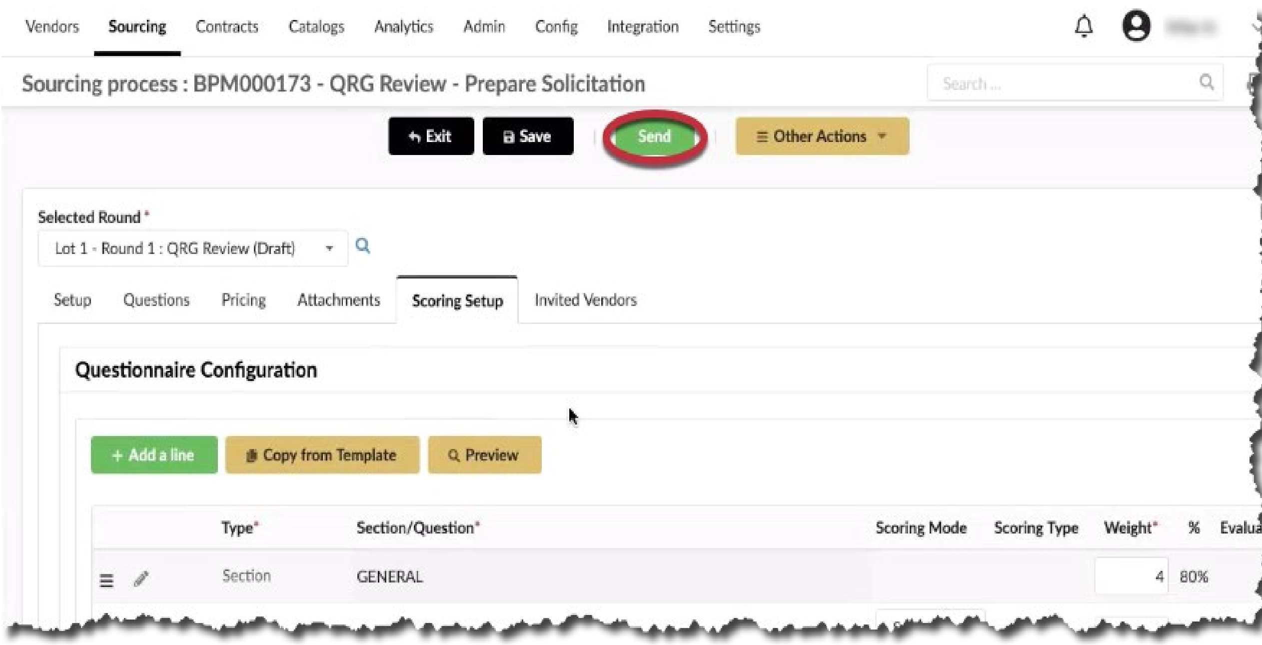
54. Once the required criteria is complete, click the "**Save**" button at the top of the screen.

SECTION 11: Send the Solicitation

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

IMPORTANT: Click "Send" once only.

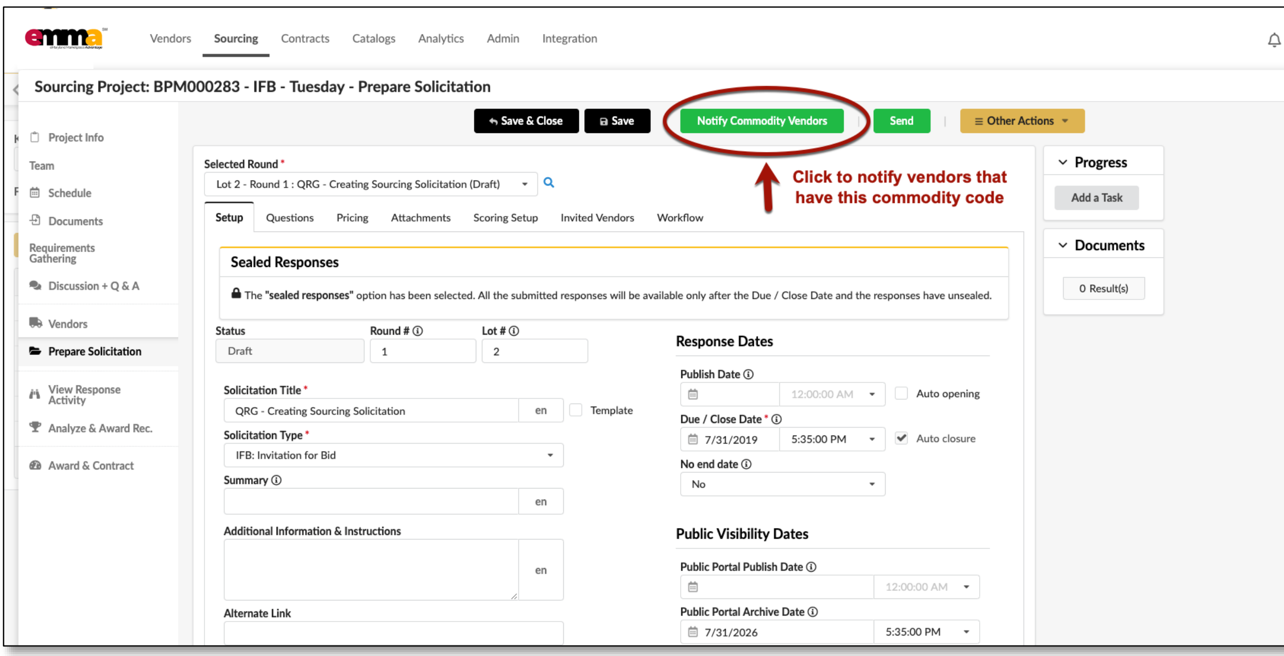
NOTE: *The solicitation will be made public on the date / time as scheduled within the Project Info step.*



SECTION 12: Notify Commodity Vendors

56. Click **"Notify Commodity Vendors"**.

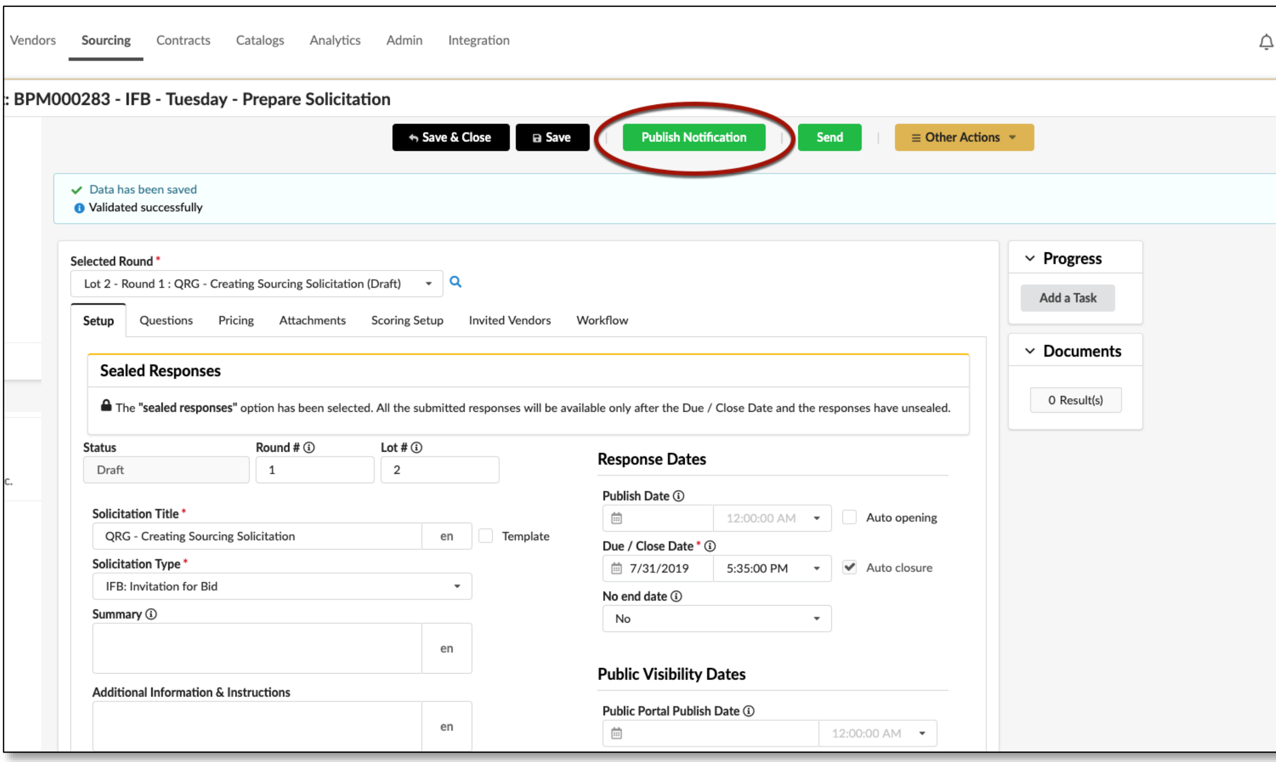
NOTE: *Clicking "Notify Commodity Vendors" will send a notice to* ***<u>all vendors with this solicitation's specific Commodity codes listed in their profiles.</u>*** *Clicking "Send" will only send to the vendors you have selected under the Vendor tab.*



SECTION 13: Publish Notification

57. Click "**Publish Notification**".

This is the final step. Your Solicitation will now be published and sent to selected vendors, as well as vendors matching the commodity codes chosen for this Solicitation if you selected Notify Commodity Vendors.



58. Click "**Save**" or "**Save & Close**" to exit the solicitation sourcing module.

59. To verify the solicitation is published, click on the "**Sourcing**" menu and see your new solicitation listed.

60. If you do not see your solicitation or if there are any other problem, contact the eMMA Help Desk at emma.helpdesk@Maryland.gov.