

Create a Small Category 2 & 3 Sourcing Project in eMMA Quick Reference Guide

<u>Overview</u>

This Quick Reference Guide (QRG) is intended for Procurement Officers/Buyers who need to create a Small Procurement Category 2 & 3 sourcing projects in the eMaryland Marketplace Advantage (eMMA). It shows how to create a Small Procurement Category 2 & 3 sourcing project from creation to sending your published solicitation to Vendors.

Small Procurement Category 2: More than \$5,000 but not more than \$15,000.

Small Procurement Category 3: More than \$15,000 but not more than \$50,000, and, if a construction procurement by the Department of General Services or Department of Transportation, not more than \$100,000.

eMaryland Marketplace Advantage

NOTE: All Category III solicitations shall be posted on eMaryland Marketplace at least 3 days before bids or offers are due. Procurement agencies are not required to post solicitations for Categories I and II small procurements on eMaryland Marketplace.

NOTE: For best results, use the Google Chrome browser to access eMMA.

Instructional Video

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Step-by-Step Instructions

Create a Small Category 2 & 3 Sourcing Project

a red border indicates a required field, while yellow callouts with a black border Letters within the callouts correspond to the explanations below the diagram.



indicate optional fields.

NOTE: Additional fields may display depending on your selections.

 Navigate to eMMA at <u>https://emma.maryland.gov</u> and click the State SSO Login (Secure Auth) button or the MDOT SSO Login (MSAzure) button, and log in with your credentials, if necessary. 2. Click the **Sourcing** tab at the top of the screen and select **Create Project** from the drop-down menu that opens.



Figure 1: The Sourcing tab and Create Project option in eMMA.

3. Enter information in the **General Information** section of the form. A red asterisk (*) indicates a required field. The diagram below shows required fields described in more detail.

NOTE: Additional fields may display depending on your selections.

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Figure 2: The General Information section and fields for creating a Sourcing Project in eMMA.

- a. Alternate ID: This field is an additional identifier. If you have a Financial Management Information System (FMIS) number, external project number or an internal contract number, enter it here. If not, then skip this field.
- b. Is a template (checkbox): Click this checkbox if you plan to make this sourcing project a template for future projects.
- c. Project Type (*): Click this field to open the drop-down menu and select the Small Procurement (e.g. Cat 2&3) project type.
- d. **Project Start Date (^{*}):** Click this field to select a date on which to start the project.
- e. Linked Business Requests: If you need to link a Business Request to your new sourcing project, click this field to open the drop-down menu and select the See All option. Use the search fields to search for your Business Request and click the checkbox to the left of the request to select it. The Business Request populates in this field.
- f. **Project Title (*):** Enter a title for your Small Category 2 & 3 in this field.
- g. Project End Date: Click this field if you know the date your project will end.
- h. **Main Category** (*): Click this field to open the drop-down menu and select one main category for your project or click **See All** at the bottom of the menu.

NOTE: Clicking See All opens a window in which all categories are listed. Search for a term in the

Keywords field and click the Search button to return relevant results. Use the plus

and minus

and minus

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icons to the left of the category groups to expand and collapse them. Select a category from this list. The category populates in the field.

i. **Other Commodities:** Click this field to open the drop-down menu and select one or more additional categories for your project or click **See All** at the bottom of the menu. Selecting more commodities means you will get a broader scope of responses from vendors who can meet your project's needs.

NOTE: Clicking See All opens a window in which all commodities are listed. Search for a term in the

Keywords field and click the Search button to return relevant results. Use the plus

icons to the left of the commodity groups to expand and collapse them. It is imperative that you select as many and as detailed commodities as applies to your project. This ensures vendors from a wide range of commodities can find and bid on your solicitation. Select one or more commodity(ies) from this list and close the window. The commodity(ies) populates in the field.

- j. Initial Funds Certification Availability: This field is system-generated. You do not need to do anything here.
- k. Issuing Agency/Sub-Agency/Site (*): Click this field to open the drop-down menu and select appropriate Issuing Agency/Sub-Agency/Site for this project or click the See All option at the bottom of the menu.

NOTE: Clicking See All opens a window in which all agencies are listed. Search for a term in the

Keywords field and click the Search button to return relevant results. Use the plus and minus

icons to the left of the agency groups to expand and collapse them. Select an agency from this list. The selected agency populates in the field.

1. Other Organizations: Click this field to open the drop-down menu and select one or more additional organizations related to your project or click the See All option at the bottom of the menu.

NOTE: Clicking See All opens a window in which all organizations are listed. Search for a term in the

Keywords field and click the Search button to return relevant results. Use the plus and minus

icons to the left of the organizational groups to expand and collapse them. Select one or more organization(s) from this list and close the window. The organization(s) auto-populates in the field.

- m. MITDP Award? (checkbox): Click this checkbox only if you have a Major IT Development Project Award.
- n. Procurement Officer/Buyer (*): This field auto-populates with your information. If this information is incorrect or needs to be changed, click this field to open the drop-down menu and select an option from the list. Click See All at the bottom of the menu to search through a list of all Procurement Officers/Buyers.

NOTE: Clicking **See All** opens a window in which all Procurement Officers are listed. Search for a term in the **Keywords** field and click the **Search** button to return relevant results. Select a name from this list. The selected Procurement Officer/Buyer auto-populates in the field.

4. Enter information in the **Additional Information** section. A red asterisk (*) indicates a required field. The diagram below shows required fields described in more detail below.

NOTE: Additional fields may display depending on your selections.



- a. Federal Funding? (*): Does your project have federal funding? Click this field and select Yes or No.
- b. **SBR Designation** (*): Does your project have a Small Business Reserve (SBR) designation? Click this field and select **Yes** or **No**.
- c. **Project Estimate:** If you have an estimate of your project cost, enter it in this field.
- d. **Project Cost Class:** Click this field and select a cost class for your project.
- e. **MBE Goal?** (*): Does your project have a Minority-Owned Business Enterprise (MBE) goal? Click this field and select **Yes** or **No**.
 - i. If you select Yes, two more fields display.
 - 1. MBE Participation (%): Enter the percentage for your MBE goal in this field.
 - 2. **MBE Sub-Goal?:** Does your project have MBE sub-goals? Click this field and select **Yes** or **No**.
 - a. If you selected **Yes**, five new fields display. Enter the appropriate percentages in the respective fields as they apply to your project:

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Figure 4: The MBE sub-goal fields.

- i. Native American MBE Participation (%)
- ii. African American MBE Participation (%)
- iii. Asian American MBE Participation (%)
- iv. Hispanic American MBE Participation (%)
- v. Women-owned MBE Participation (%)
- f. **VSBE Goal?** (*): Does your project have a Veteran-Owned Small Business Enterprise (VSBE) goal? Click this field and select **Yes** or **No**.
 - i. If you select **Yes**, one more field displays.
 - 1. **VSBE Percentage (%);** Enter the percentage for your VSBE goal in this field.
- g. Grant Funding? (*): Does your project have grant funding? Click this field and select Yes or No.
 - i. If you select **Yes**, one more field displays.
 - 1. Grant Funding Amount (\$) (*): Enter the dollar amount for your grant funding.

5. Click the **Save** button at the top of the page.

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esults. Use up and dow	wn arrow to fetch them.

Figure 5: The Save button at the top of the Create Sourcing Project page.

Add Team Members

6. Click the **Team** tab on the left-hand side-panel and click the ellipsis (three dots) button. The Browse Users window opens and displays a list of users in eMMA.



Figure 6: The Team Tab in the left-hand side-panel and the ellipsis (three dots) button.

7. Use the fields and filters to search for team members. Click the checkbox to the left of a team member you want to add. Repeat this step for each user on your Team and close the Browse Users window. The Team members you selected display on the Team page.

NOTE: Team members can have more than one profile in eMMA. You can click on the team member's name to

view information about their eMMA profile.

Browse Users

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Figure 7: Two users selected in the Browse Users window.

8. (Optional) To remove a user, click the **X** to the left of the user's name.

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Figure 8: Users listed on the Team page and the X on the left to remove a user.

9. Click the field to the right of a user's email address, in the **Profile(s)** column, to open a drop-down menu. **Team**

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Figure 9: The Profile field to the right of a user's email.

Select a profile role for the user from the drop-down menu. By default, each user is assigned a role. Added users are assigned the SME (Sourcing Project) role, while the Procurement Officer is designated the Responsible (Sourcing Project) role by default. Profile roles and permissions are further defined below.

NOTE: You can assign multiple roles but only one Responsible profile role for the Team.

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Steph	en s	@maryland.gov	SME (Sourcing Project) O -
Jessica	a)	@md.gov	Responsible (Sourcing O - Project) ×

Figure 10: The drop-down menu to assign profile roles for a user in a Team.

Profile roles are defined as:

- a. Responsible (Sourcing Project):
 - i. This is the Owner of the Sourcing Project.
 - ii. They have read, view, and edit access to the project.
 - iii. All Vendor communications come to the person with this role.
 - iv. You can only assign one user the Responsible role per project. However, you must have at least one Responsible role assigned.

b. Contributor (Sourcing Project):

- i. They have view access to the project and response activity.
- ii. They can edit information on the Project Information, Team, Schedule, and Documents tabs

c. SME (Sourcing Project):

- i. The Subject Matter Expert (SME) and default role assigned when you add a team member.
- ii. This member can be assigned tasks in eMMA.
- iii. They can receive email notifications (Forum messages).
- iv. They can respond to Requirements Gathering questions or Evaluate/Score when assigned the task.
- 11. (Optional) To remove a user's profile role, click the **X** to the right of the role in the respective field in the Profile(s) column.

NOTE: If you remove the user's only role, it resets to the SME (Sourcing Project) role by default.

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Figure 11: The X to the right of a role to remove it from a user in a team.

12. When you've completed adding your team members and assigning profiles, click the **Save** button at the top of the page.

NOTE: You must remember to click the Save button. If you don't, you will lose your progress on this tab.

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Documents		
⊞ Requirements Gathering	Contact Email Profile(s)	
Discussion + Q & A	× Lar. @maryland.gov Contributor (Sourcing O * Project) ×	

Figure 12: The Save button at the top of the Team page.

Add Documents

- 13. Click the **Documents** tab in the left-hand side-panel to display the Documents page. Existing documents, if any, display in the **Sourcing Project Documents** pane.
- 14. Click the **Create Document** button in the **Sourcing Project Documents** pane. The Sourcing Project Documents pop-up window displays.

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Figure 13: The Create Document button in the Sourcing Project Documents pane of the Documents tab.

15. Enter information in the form fields. A red asterisk (*) indicates a required field.

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Figure 14: The Sourcing Project Documents window.

- a. **Title** (*): Enter a title for the document.
- b. **Version** (*): Enter a numeric value for the version of the document. The application will suggest the next version increment for each new revision.
- c. **Summary:** Enter a brief summary of the document. Once you click this field, text editing options appear above it.
- d. Status: This field shows the status of your document. No action is needed here.
- e. Click or Drag to add files (*): Click this button to choose a file from your device or drag and drop the file on this spot to add it. The added file displays below this button. Click the X to the left of the document to remove it.
- f. **Sourcing Project:** This field indicates the sourcing project associated with this document. No action is needed here.
- 16. You have four options to move forward:

Sourcing Project Documents	
Title	Save as draft Save & Close Publish Delete Information
Title*	Status
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Figure 15: The Save and publish options for a document in Draft state.

a. **Save as draft:** Click this button to save the document as a draft. The Sourcing Project Documents window now shows the document listed (in the Information pane), tracking info of the document (at the

bottom), and a **Delete** button (at the top) to remove the draft.

NOTE: Other users cannot see documents in Draft status. Changing the Status to Approved makes it visible to others (see Step 16c).

- b. Save & Close: Click this button to save the document as it is shown and close the Sourcing Project Documents window.
- c. Publish: Click this button to publish or "Approve" the document and make it visible to others. The Sourcing Project Documents window now shows the document status as "Approved," a New Draft button to create a new draft of the document (at the top), a Delete button to remove the document (at the top), and tracking information (at the bottom).
- d. **Delete:** Click this button to cancel/delete the document from eMMA.
- 17. Unless you chose option b (Save & Close) or d (Delete) in the previous step, click the **Save & Close** button at the top of the window.
- 18. Click the **Save** button at the top of the Documents page.

Create a Schedule

Instructions coming soon... Please see the QRG Create a Schedule for Your Sourcing Project.

Add Vendors

This process continues from the last step in the previous process. It shows how to add vendors to your Small Category 2 & 3 sourcing project based on identified criteria and requirements.

NOTE: For solicitations requiring a longer period of time, you may need to /refresh the list of vendors receiving notifications to capture newly registered vendors for a specific category code.

19. Click the **Vendors** tab in the left-hand side-panel.

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Figure 16: The Vendors tab in the left-hand side-panel.

20. Click the ellipsis (three dots) button in the **Consulted Vendors** section. The **Browse Vendors** pop-up window opens and displays a list of Vendors based on the sourcing project's main commodity.



Figure 17: The ellipsis (three dots) icon in the Consulted Vendors section.

- 21. (Optional) If you have a specific Vendor in mind that may not be on the commodity list but can provide the required service, enter their name in the **Keywords** field and click the **Search** button.
 - a. Select the checkbox to the left of the Vendor and close the Browse Vendors window. That Vendor displays on the Vendors page.
 - b. Click the ellipsis (three dots) icon to continue to Step 22.
- 22. Click the **Commodity** field to open a drop-down list and click the **See All** option at the bottom. This list lets you add more commodities relevant to your sourcing project to get a broad selection of vendors. You can add one commodity or more in this field.

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Figure 18: The Commodity field and the See All option in the drop-down menu.

- 23. (Optional) A new window opens with a full list of commodities. Enter a term into the **Keywords** field and click the **Search** button to see highlighted results.
- 24. The Select Commodities window opens with a full list of commodities. Use the plus and minus icons to the left of the commodity groups to expand and collapse them. Select the checkboxes to the left of the commodity(ies) you want to add and close the window.

NOTE: Selecting a commodity level next to a plus icon or minus icon only provides vendors that are registered for that exact commodity, and NOT any sub commodities below that level.

The selected commodities display in the Filters section of the window, below the search fields and above the list

of vendors.

	Select Commodities
	
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	🗄 🗋 🌇 24000000 - Material Handling and Conditioning and Storage Machinery and their Accessories and Supplies
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	27000000 - Tools and General Machinery
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	27120000 - Hydraulic machinery and equipment
	🖽 🗌 🕪 27121500 - Hydraulic presses
	27121600 - Hydraulic cylinders and pistons
	☑ 27121602 - Hydraulic cylinders
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A	27130000 - Pneumatic machinery and equipment
	⊞ □ 12140000 - Automotive specialty tools
	田 □ 参 30000000 - Structures and Building and Construction and Manufacturing Components and Supplies ■

Figure 19: The See All window for Commodities with selected commodities.

25. Click the **Search** button at the top of the Browse Vendors window. A list of Vendors displays relevant to the commodities you selected.

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Figure 20: The Search button in the Browse Vendors window after adding commodites.

26. Select the topmost checkbox to the left of the column headers to select all vendors on that page.

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Figure 21: The topmost checkbox to the left of the column headers in the Browse Vendors window.

27. Scroll down to the bottom of the Vendors list and click the next page in succession. A list of unselected Vendors displays.

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Figure 22: The page numbers for a list of Vendors in the Browse Vendors window.

- 28. Repeat Steps 26 and 27 until the Vendors on all pages are selected.
- 29. Close the Browse Vendors window. The Vendors are listed in the Consulted Vendors section.
- 30. Click the **Save** button at the top of the page.

IMPORTANT: You must make sure you click the **Save** button or you will lose your progress to this point.

emme	Vendors Sourcing Contracts Public Request	Catalogs Analytics
く う ☆	Sourcing Project: BPM021279 - Operation	on SnoBGone - Vendors
Project Info	Save	e & Close 🛛 🕒 Save Extra
🏜 Team	Consulted Vendors	
菌 Schedule	Search & Select Vendor(s) ①	
Documents		
	Company Status Main contact	Classification
Discussion + Q & A	RC.S. Activated Rodney SIMMS	O - Known and used
Nondorr	Plumbing lic	Kilowitand used
	* 081375548 Registered Bruce BROWN	O - Known and used
 Prepare Solicitation 	P 20 2+	Known and used

Figure 23: The Save button at the top of the Vendors page with added Vendors.

Prepare Solicitation – Setup

This process continues from the last step in the previous process. It shows how to set up your solicitation for your Small Category 2 & 3 sourcing project.

- 31. Click the **Prepare Solicitation** tab on the left-hand side-panel. The **Setup** subtab displays a form.
- 32. Enter information in the fields on the left side of the form. A red asterisk (*) indicates a required field.

NOTE: Depending on your selections in the fields, more fields may display.

		↔ Save & Close	D Save Cro	eate from template			
 Fields marked by an ast Expected date format: 1 	erisk.* are mandatory //d/yyyy						
Setup Pricing	Attachments a	Vendors Workflow					
Status	Round # ①	Lot # ①	Response D	ates			
	<u></u>		Publish Date (D			
Solicitation Title*	792077	There are a service and	h >=	12:00:00 AMO •			
Toys for K9 Security	Units	en lemplate	Due / Close D	ate ①*			
Solicitation Type			i >=	12:00:00 AM@ •	Auto closure		
Quick Quote			Due / Close D	ate (EST)	Due / Close Date (EST)	No end date ①	
Summary ()						No	
~		en				C C	
Additional Information	& Instructions		> Advanc	ed options		ĸ	
and a construction of the last		en				_	
>							

Figure 24: The Setup form and fields on the Prepare Solicitation tab.

- a. The Status, Round #, and Lot # fields are system-generated. No further action is required here
- b. Solicitation Title (*): The title of your solicitation auto-populates here. Click this field to change it, if necessary.
- c. **Template** (checkbox): Select this checkbox if you want to make a template from this solicitation to use in the future.
- d. **Solicitation Type (*):** This field auto-populates based on information entered for your sourcing project. No further action is required here.
- e. Summary: Enter a brief introduction and summary for your solicitation.
- f. Additional Information & Instructions: Enter any additional information and instructions in this field.
- g. Alternate Link: Enter the link to the bid board on which this solicitation is posted, if applicable; i.e. BidExpress. While this field is not mandatory, it is crucial that you enter this information so that Vendors know where to find the solicitation documents.
- h. **Publish Date: IMPORTANT!!** If you want vendors to start submitting a response immediately, leave this field BLANK. Select a date only if you want vendors to start submitting responses at a future date.
- i. **Due/Close Date** (*): Click this field and select the date that vendors can no longer submit responses.
- j. **Auto closure** (checkbox): The option to close the solicitation on the due date is selected by default and cannot be changed. No further action is required here.
- k. **Due/Close Date (EST):** This field populates after you click the Save button (Step 37). No further action is required here.
- I. No end date: Do you prefer to have an open end date? Click this field and select Yes from the dropdown menu. No is the default selection.

33. Click the arrow to the left of the Advanced options section below the Response Dates.

NOTE: Some checkboxes are selected by default.

- 34. Click the checkbox to the left to select the **Solicitation Visible to Public** option. This makes your Small Category 2 & 3 procurement visible to the public.
- 35. Click the checkbox to the left of the **Bid Holders List Visible to Public** option. This allows the vendor community to see who has expressed interest in the project.
- 36. (Optional) Review and make any other selections necessary to your project. Options include:

Ý	Advanced	options
---	----------	---------

- Buyers can change bid due date
- ✓ Solicitation Visible to Public
- Sealed Responses
- ✓ Vendors must Acknowledge & Identify Intent to Respond
- Vendors can partially bid/propose on pricing
- ✓ Bid Holders List Visible to Public

Figure 25: The Advanced options for setting up a Small Category 2 & 3 solicitation.

- a. Buyers can change bid due date,
- b. Sealed Responses,
- c. Vendors must Acknowledge & Identify intent to Respond (selected by default),
- d. Vendors can partially bid/propose on pricing,
- 37. Click the Save button at the top of the Prepare Solicitation page.



Figure 26: The Save button at the top of the Prepare Solicitation page.

Prepare Solicitation – Pricing

This process continues from the last step in the previous process. It shows how to set pricing for your Small Category 2 & 3 solicitation.

38. Click the **Pricing** subtab in the **Prepare Solicitation** page.

emme	Vendors Sourcing Cor	ntracts Public Request Catalogs
く つ ☆	Sourcing Project: BPN	M021618 - IFB Test - Prepare
\$	¢	
Team		
🛱 Schedule	Fields marked by an asternation	erisk " are mandatory
+ Documents	Expected date format: N	Л/d/уууу
	Selected Round*	
Discussion + Q & A	Lot 1 - Round 1 : IFB Test	i (Draft) 🖸 👻 🔍
🚯 Vendors	Setup Questions	Pricing Attachments Scoring Se
Prepare Solicitation	Keywords	Price Grid
A View Response		

Figure 27: The Pricing subtab on the Prepare Solicitation page.

39. Enter information in the form fields to create a line item within the pricing grid for each item for bid. A red asterisk (*) indicates a required field. A (V) to the right of the heading indicates values that are visible by vendors and the public, if you opted to make this a public solicitation.

= Automa									
ten Cala (V) (P)	0.005.Tem/00 *	Resident for *	Detailed Description	Canonality Of	é.	NAM (D) - A	divence Price	Sarget Price	Street Printer (M), Yamat (M)
· ··· ~	Based by	••		~	\sim	~	\wedge	\sim	
o Assattal a	b	c	d	e	f	g	h	Ŀ	٥

Figure 28: The line item form and fields to price an item.

- a. **Item Code (V)** (*): This item code auto-populates. You do not need to do anything here.
- b. Item Type (V) (*): Click this field to open the drop-down menu. Select one of the four options;
 - i. Required Item
 - ii. Price Adjustment
 - iii. Optional Item
 - iv. Additional Fees
- c. Item Label (V) (*): Enter in the name and brand of the item in this field.

NOTE: Be sure to write a clear and concise Item Label; the vendor will use this as an indicator when preparing pricing submissions.

- d. Detailed Description: Enter a detailed description of your item in this field.
- e. **Commodity:** Click this field and click the **See All** option at the bottom of the menu. The Select Commodities window opens. Enter a term for your commodity in the **Keyword** field and click the **Search**

button for relevant results. You may need to click the plus

icons to expand and

Buyer QRG - Create a Small Category 2 & 3 Sourcing Project and Solicitation

and minus

collapse commodity tiers. Click the checkbox to the left of the commodity that applies to your item and close the Select Commodities window.

- f. **Quantity** (*): Enter the quantity needed for your item in this field.
- g. **UoM** (*): Click this field to open the drop-down menu and select a unit of measure for your item. (Optional) Click the **See All** option at the bottom of the menu to select from a more detailed list.
- h. **Reference Price:** Enter the price of the item for one unit on the market. You do not need to enter a price if you want the vendor to list their own price.
- i. Target Price: Enter the price of the item that you would like to pay for one unit.
- 40. Click the **Save** button at the top of the Prepare Solicitation page. A new line is created in the pricing subtab and displays at the top of the list. Your first item is entered and displays below the empty line item fields in the Pricing subtab.

Gathering	Selected Round*							
Discussion + Q & A	Lot 1 - Round 1 : IFB Test	t (Draft) 🖸 🗸 🔍						
R Vendors	Setup Questions	Pricing Attachm	ents Scoring Setup	Invited Vendors Wor	kflow			
 Prepare Solicitation 	Keywords	Price G	rid	Items' groups	Ite	em Type		
A View Response Activity				·•]	294 		- Q, Search	Reset
🖤 Analyze & Award Rec.		Sh	ow changes from previous	version				
Vorkflow	+ Add grid +	Add products	▲ Export Grids to Excel	a Import Excel grids	Q. Previe	w		
Award & Contract	Pricing							
	actions <u>Item Code (V</u>) @* <u>Iter</u>	<u>Type (V)</u>	Item Label (V) 🚊 *	Detailed De	escription	Commodity	Qty*
new line item form	E Actions) @* <u>Iter</u>	Type (V) *	Item Label (V) * *	Detailed De	escription	Commodity	Qty*
new line item form	E Actions) @* <u>Iter</u>	Type (V) *	Item Label (V) • *	Detailed De	escription	Commodity	Qty*
new line item form	E Actions Item Code (V I 2 I 1 I 1 I 1	2 @* <u>Iten</u> P	Type (V) *	Item Label (V) * JBL Portable Speaker	Detailed De	escription //	S2161512 - Loudspeakers	Qty*

Figure 29: A new line item form and a completed line item in the Pricing subtab.

41. (Optional) Repeat Steps 39 and 40 to add new items, if necessary.

Prepare Solicitation – Attachments

This process continues from the last step in the previous process. It shows how to add attachments to your Small Category 2 & 3 solicitation.

42. Click the Attachments subtab in the Prepare Solicitations page.

(1)	Vendors Sourcing Contracts Pub	olic Request
	Catalogs Analytics	W Acc
< つ ☆	Sourcing Project: BPM021618	- IFB Test - Prepare Sol
🛎 Team	Save & Close 🛛 Save 🕴 Notify C	Commodity Vendors
菌 Schedule	Fields marked by an asterisk * are man	datory
-원 Documents	Expected date format: M/d/yyyy	2
	Selected Round *	
Discussion + Q & A	Lot 1 - Round 1 : IFB Test (Draft)	Q
Vendors	Setup Questions Prices A	ttachments Scoring Setup
Prepare Solicitation		
A View Response Activity	Create a Document Attach i O Result(s)	Existing Document
🝸 Analyze & Award Rec.		

Figure 30: The Attachments subtab on the Prepare Solicitation page.

43. (Optional) Click the **Create a Document** button to add a new document to your solicitation.

NOTE: Uploaded documents cannot exceed 300,000 KB.

	Selected R	ound*	
Discussion + Q & A	Lot 1 - Round 1 : RFP Test JS (Draft) 🔕 -		
Vendors	Setup	Attachments	Invited Vendors General Question:
Prepare Solicitation			
Niew Response	Crea	te a Document	Attach Existing Document
n Open General	0 Re	sult(s)	۵

Figure 31: The Create a Document button in the Attachment subtab.

a. In the Content Editor window that opens, click the link that best describes your document.



Figure 32: The document links in the Content Editor window.

b. Enter information in the document window fields and add the document (**Click or Drag to add files** button).

NOTE: Make sure you change the document status to **Approved** so that both team members and vendors can view it.

Information	
Status*	
Drafted	0
To be Approved	
Approved	
Blocked	

Figure 33: The Approved status in the Status drop-down menu for a document.

- c. Click the **Save & Close** button at the top of the window. Your added document displays below the Attachment subtab.
- 44. (Optional) Click the **Attach Existing Document** button to add a document that exists in the Documents tab of your project. The Sourcing Project/Documents window opens and lists any documents you added to the Documents tab.

	Selected Round*		
Discussion + Q & A	Lot 1 - Round 1 : RFP Test JS (Draft) 🖸 -		
Re Vendors	Setup Attachments Invited Vendors General Question:		
Prepare Solicitation	Create a Desumant		
Niew Response	Attach Existing Document		
Open General Envelope	0 Result(s)		

Figure 34: The Attach Existing Document button in the Attachments subtab.

d. Select one or more checkbox(es) to the left of the document(s) you want to attach and click the Save & Close button at the top of the Sourcing Project/Documents window. The selected document(s) display in a list on the Attachments subtab.

ourcing Project / Documents			B Save & Close	
 General Documents 				
Keywords Q. Search Reset		/		
O Result(s)	/			
Yrogram Documents				
 Sourcing Project Documents 				
Keywords Reset				
← a Zip Selected Documents 0 Selected				
Title		Contact	Last Modified on	Creation D
Building specs @1C	×	PROC OFFICER Jessica	11/5/2020 11:01:07 AM 11/	/5/2020 11:00:57
		June 100		

Figure 35: The checkbox for an existing document and the Save & Close button in the Sourcing Project/Documents window.

NOTE: Documents in **Draft** status will not be visible to vendors. The **Type** column for your document will be orange and read "Technical Documents (Drafted)".

	elected Round*			
Discussion + Q & A	Lot 1 - Round 1 : IFB Test (Draft	0 · Q		
Vendors	Setup Questions Pricin	g Attachments Sc	coring Setup Invited Vendors W	/orkflow
Prepare Solicitation	Create a Document	Attach Existing Document	t	
Activity	→ 0 Selected	Tin Colorited Documents		
🖤 Analyze & Award Rec.	H U Selected	all operate operation	3	
☑ Workflow	Title Typ	í		Conta
A document in Draft sta	te. <u>building</u> specs Dec	nical uments Drowse and F fted)	Filter Sourcing Projects QRG Draft Buyer.do	ex PROC OFFI Jessic
	Drafting Tech Specs Doc (App	nical uments Approver QR roved)	IG Template.docx	PRO(OFFI Jessic
	2 Result(s)			

Figure 36: A document in Draft state and a document in Approved state.

45. Click the **Save** button at the top of the Prepare Solicitation page.

Notify Vendors and Publish Notification

This process continues from the last step in the previous process. It shows how to notify vendors of your Small Category 2 & 3 solicitation.

46. Click the Invited Vendors sub-tab and scroll to the bottom of the selected Invited Vendors list.

Sourcing Project: BPM021868 - Washington Memorial Security K9 detail - F
Selected Round*
Lot 1 - Round 1 : Security K9 Shot Tower (Draft) 😆 🗸
Setup Questions Pricing Attachments Scoring Setup Invited Vendors Workfik
▲ - The solicitation must be in "Open" status in order to send the notification

Figure 37: The Invited Vendors sub-tab on the Prepare Solicitation page.

47. Scroll to the bottom and click the next page number of Vendors.



Figure 38: The next page number of Vendors for a solicitation in the Invited Vendors sub-tab.

48. Scroll to the top and click the checkbox to the left of the Invited Vendors column header, if not already selected.

く う ☆	Sourcing Project: BPM021868 - Washington Memorial Security K9 detail - Pre
«	+ Save & Close Save Send
Schedule	Selected Round*
Documents	Lot 1 - Round 1 : Security K9 Shot Tower (Draft)
■ Requirements Gathering	Setup Questions Pricing Attachments Scoring Setup Invited Vendors Workflow
Discussion + Q & A	
Vendors	In vited Vendors
Prepare Solicitation	Accession Learning
View Response	Anchor Construction Corp
Activity	BluEdge
🝸 Analyze & Award Rec.	Capitol Office Solutions, A Xerox Company

Figure 39: The checkbox to the left of the Invited Vendors column header.

- 49. Repeat Steps 47 & 48 until all your vendors are selected.
- 50. Click the **Save** button at the top of the page.
- 51. Click the **Send** button at the top of the Prepare Solicitation page. A new window opens with your selected vendors.

anma	Vendors Sourcing Contracts Public Request Catalogs Analytics 🔞 Accessibility 4
< 5 公	Sourcing Project: BPM021618 - IFB Test - Prepare Solicitation Search ③
Ф Tran	A Save & Close B Save Nixtly Cammodity Vendors Velidate Send E Other Activ
🗂 Schedule	Selected Round*
🗄 Documenta	Lot 1 - Round 1 : IFB Text (Draft) O • (Q.)
i≡ Raquirementa Gathering	Setup Questions Pricing Attachments Scoring Setup Invited Vendors Workflow

Figure 40: The Send button in the Prepare Solicitation page.

52. (Optional) Select the **Solicitation Attachments** checkbox if you have added attachments for this solicitation and you want them sent in this notification.

	Send Send and close		
iles to attach			
Solicitation Attachments	Excel Pricing Response Form (.xls)	Excel Pricing Response Form (.xlsx)	
	Excel Questionnaire Response Form (xlsx)		

Figure 41: The Solicitation Attachments checkbox in the new window.

53. Click the **Send and close** button at the top of the Solicitation window. This notifies the vendors you selected in the Vendor tab. Two prompts display. Click **OK** for both.

Figure 42: The Send and close button in the Solicitation window.

- 54. Click the **X** in the corner of the Solicitation window to close it.
- 55. Click the **Notify Commodity Vendors** button at the top of the Prepare Solicitation page. This sends a notice to all vendors with this solicitation's specific commodity codes listed in their profiles. A prompt displays. Click **OK**.



Figure 43: The Notify Commodity Vendors button for a solicitation.

56. Click the **Publish Notification** button at the top of the Prepare Solicitation page. A prompt displays. Click **OK**.

く り ☆	Sourcing Project: BPM021809 - Security K9 Prepare S	olicitation Search
«	A Save & Close B Save Publish	Notification Send 🛛 🗮 🕻
🛱 Schedule 원 Documents	 Fields marked by an asterisk * are mandatory Expected date format: M/d/yyyy 	
	Selected Round*	
Discussion + Q & A	Lot 1 - Round 1 : Security K9 Shot Tower (Open)	
Nendors	Setup Questions Pricing Attachments Scoring Setup Invited Vendors	Workflow
Prepare Solicitation		
A View Response Activity	Ready to Notify Send Vendors Notification	

Figure 44: The Publish Notification button for a solicitation.

The Workflow subtab in the Prepare Solicitation tab shows that your message has been sent to your vendors.

< 5 A	Sourcing Project: BPMC	21809 -	Security K9	_	Prenare Solicita	tion	Soarch
, 9 M	oourenig i rojeen bi inte						Jean
* Team			+ S	ave & Close	Di Save	Send	≡ Other Actions +
Schedule	6 Fields marked by an asteris	k * are man	datory				
Documents	Expected date format: M/d	/уууу					
Requirements Gathering	Selected Round*						
Discussion + Q & A	Lot 1 - Round 1 : Security KS	Shot Towe	r (Open) 🖸 🕶 🤇	2			
Vendors	Setup Questions Pr	icing A	tachments Sc	oring Setup In	vited Vendors Wo	rkflow	
Prepare Solicitation							
View Response Activity	Ready to Notify Vendors	Send Notificat	ion				
Analyze & Award Rec.							
Madellow	Approval History						
A A DE KLEDIKK	Activity	Name	Delegate to	Created on	Validated on	State Due dat	te Initial performer
WORKING				11/24/2020	11/24/2020 4-34-32	20102021	
Award & Contract	Send Notification	SURDIN Jessica		4:30:47 PM	PM	00.0	SURDIN Jessica
Award & Contract	Send Notification Ready to Notify Vendors	SURDIN Jessica SURDIN Jessica		4:30:47 PM 11/24/2020 4:07:57 PM	PM 11/24/2020 4:30:47 PM	000	SURDIN Jessica



