Create a Public Notice in eMMA

Quick Reference Guide

Overview

This Quick Resource Guide (QRG) is intended for Procurement Officers/Buyers who want to create a Public Notice in the eMaryland Marketplace Advantage (eMMA).

According to COMAR (21.05.02.04.B.), notice of an invitation for bids (IFB) for which the bid amount is reasonably expected to exceed $50,000 shall be published in eMMA unless the resulting contract is reasonably expected to be performed entirely outside this State or the District of Columbia. Publication shall be at least 20 days before the bid submission date. Publication of notice less than 20 days before bid submission is defective unless notice of the project is not required by State law.

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

This QRG includes the following sections:

- Create a Public Notice
- Add Team Members
- Add Vendors
- Prepare Solicitation – Setup
- Prepare Solicitation – Pricing
- Prepare Solicitation – Attachments

Step-by-Step Instructions

Create a Public Notice

NOTE: This QRG uses diagrams with specific callouts to show required and optional fields in forms. A yellow callout with a red border **a** indicates a required field, while yellow callouts with a black border **b** indicate optional fields. Letters within the callouts correspond to the explanations below the diagram.

NOTE: Additional fields may display depending on your selections.

1. Navigate to eMMA at https://emma.maryland.gov 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.

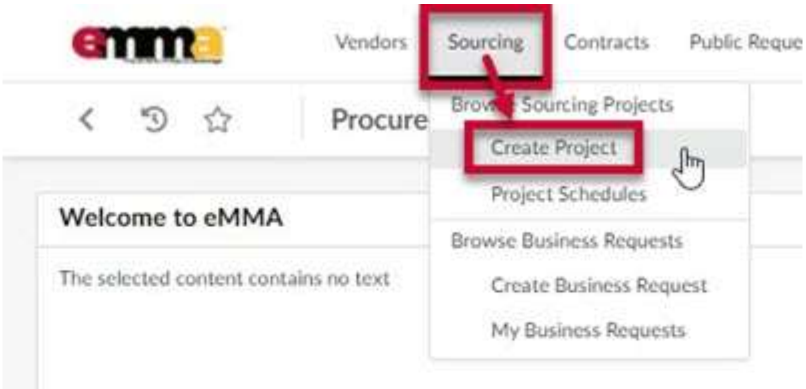


Figure 1: The Sourcing tab and Create Project option in eMMA.

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.

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 **Public Notice** 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 public notice 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 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 and minus 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.

l. **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.

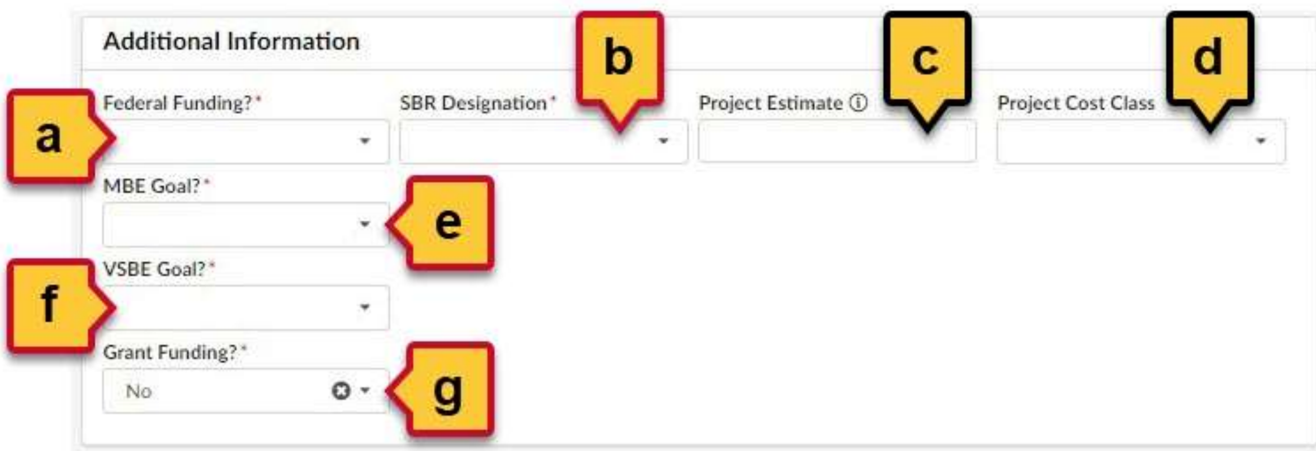


Figure 3: The Additional Information section and fields for creating a Sourcing Project in eMMA.

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:

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.

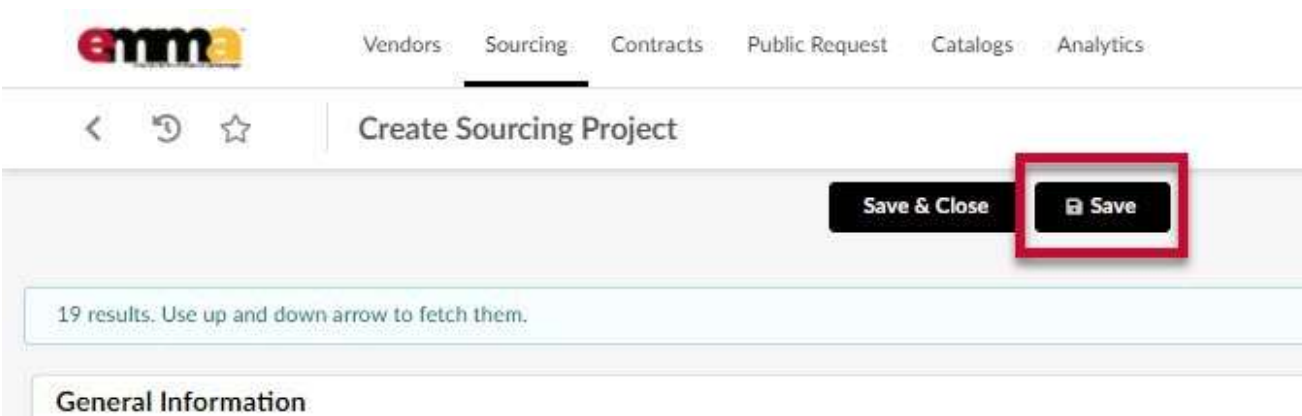


Figure 5: The Save button at the top of the Create Sourcing Project page.

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.

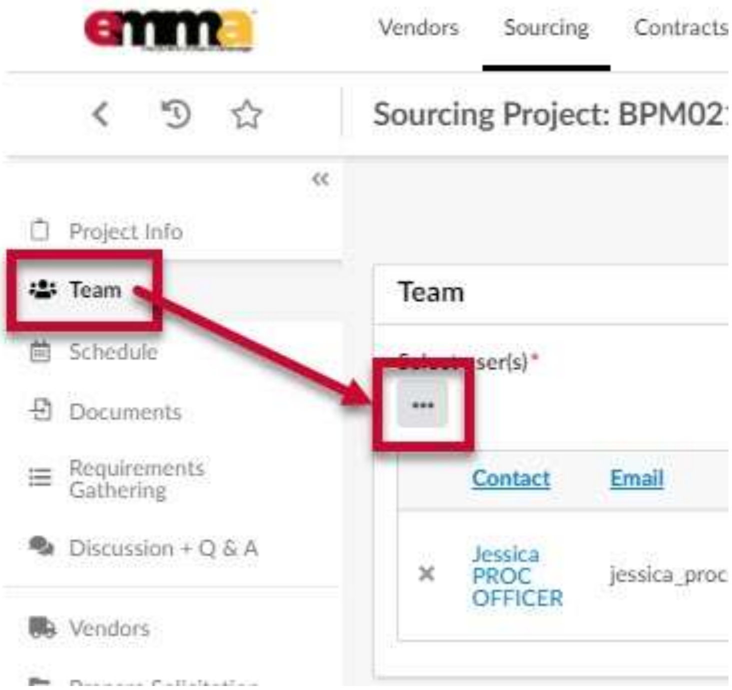


Figure 6: The Team Tab in the left-hand side-panel and the ellipsis (three dots) button.

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.

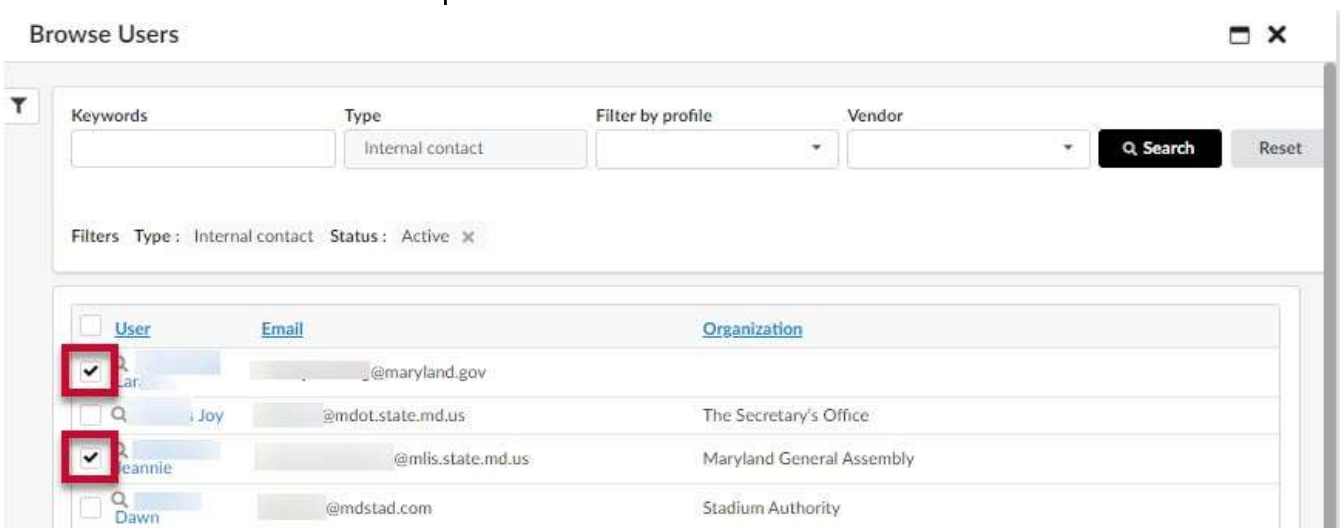


Figure 7: Two users selected in the Browse Users window.

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

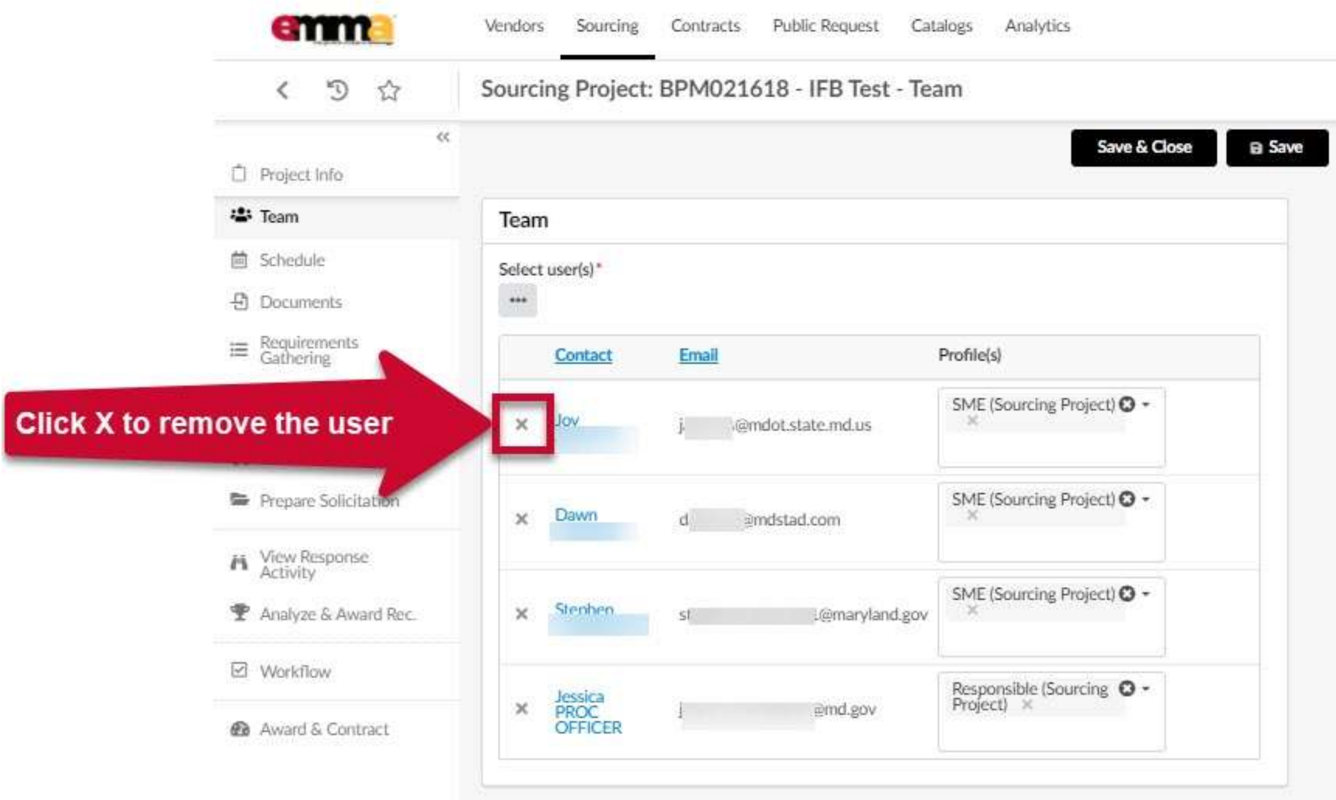


Figure 8: Users listed on the Team page and the X on the left to remove a user.

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

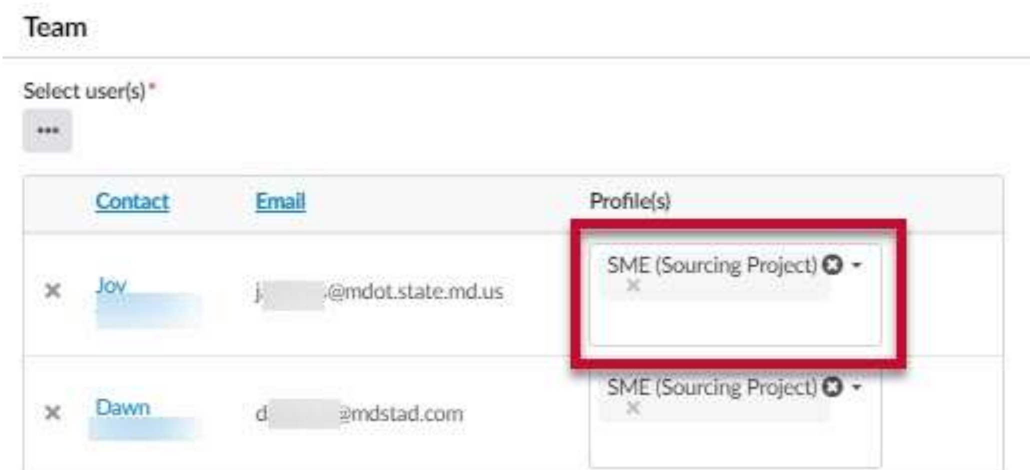


Figure 9: The Profile field to the right of a user's email.

10. 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.

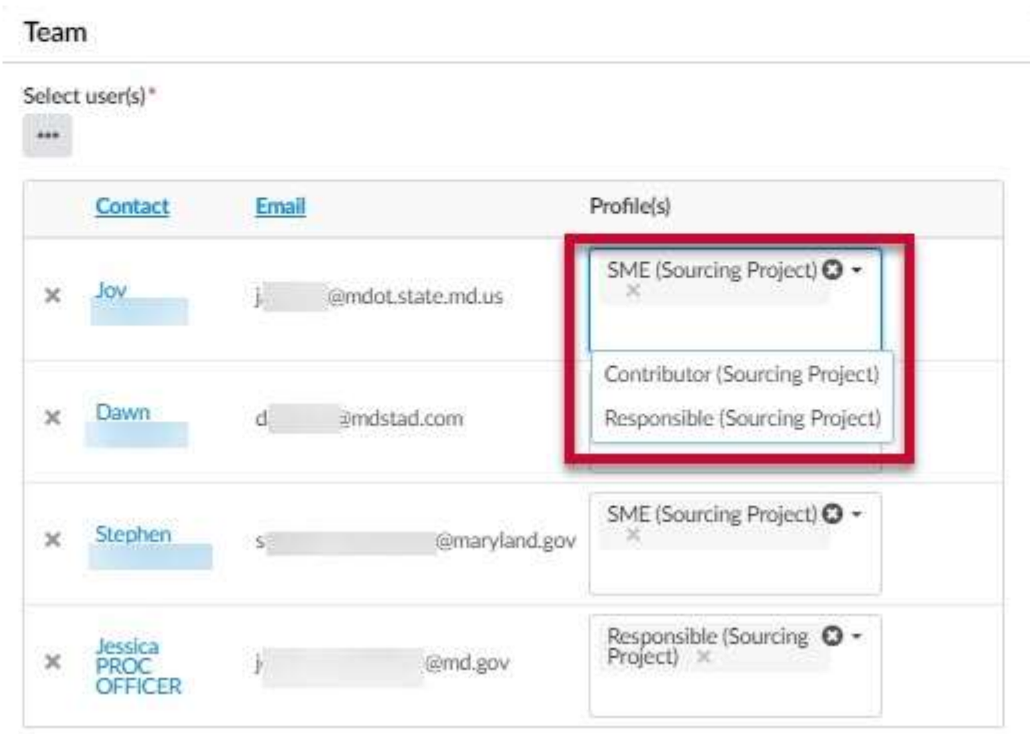


Figure 10: The drop-down menu to assign profile roles for a user in a Team.

Profile roles are defined as:

a. **Responsible (Sourcing Project):**
   i. This role is by default assigned to the Procurement Officer but you can change it.
   ii. This is the Owner of the Sourcing Project.
   iii. They have read, view, and edit access to the project.
   iv. All Vendor communications come to the person with this role.
   v. 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.

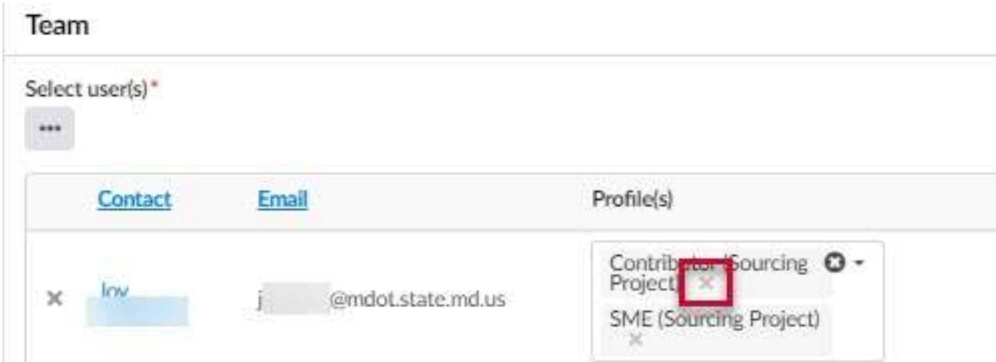


Figure 11: The X to the right of a role to remove it from a user in a team.

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.

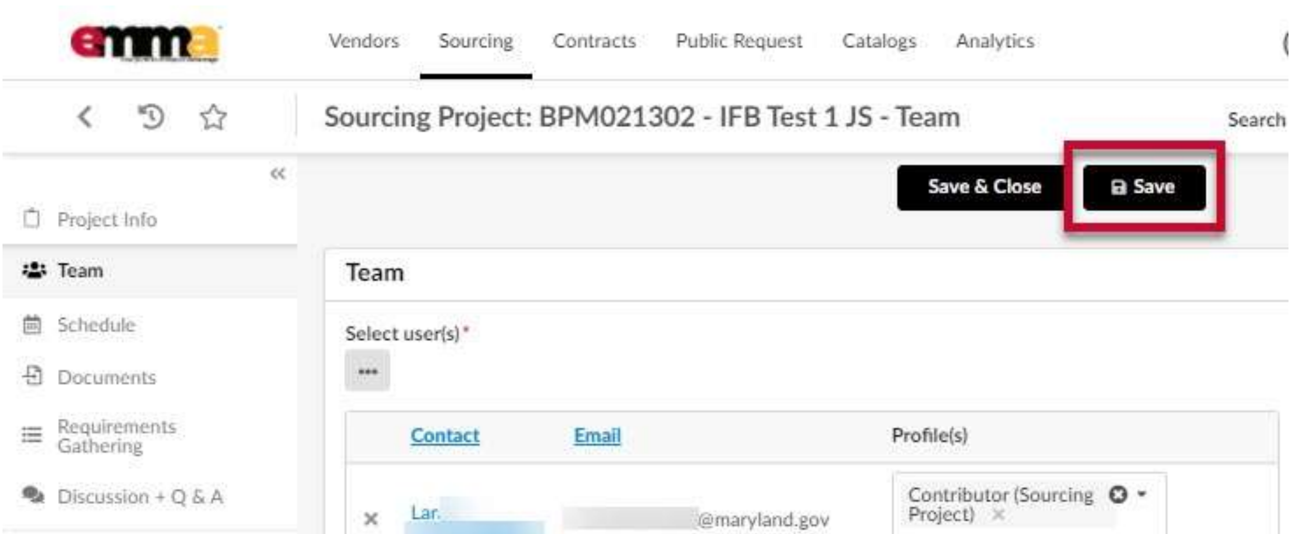


Figure 12: The Save button at the top of the Team page.

Add Vendors

This process continues from the last step in the previous process. It shows how to add vendors to your public notice.

13. Click the **Vendors** tab on the left-hand side-panel. Any preselected vendors display on this page.

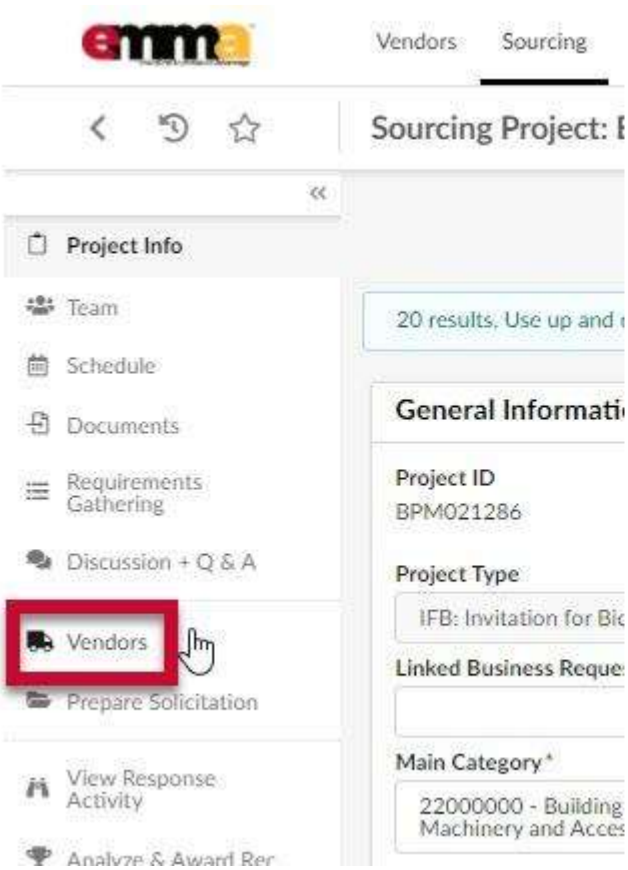


Figure 13: The Vendors tab in the left-hand side-panel.

14. 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.

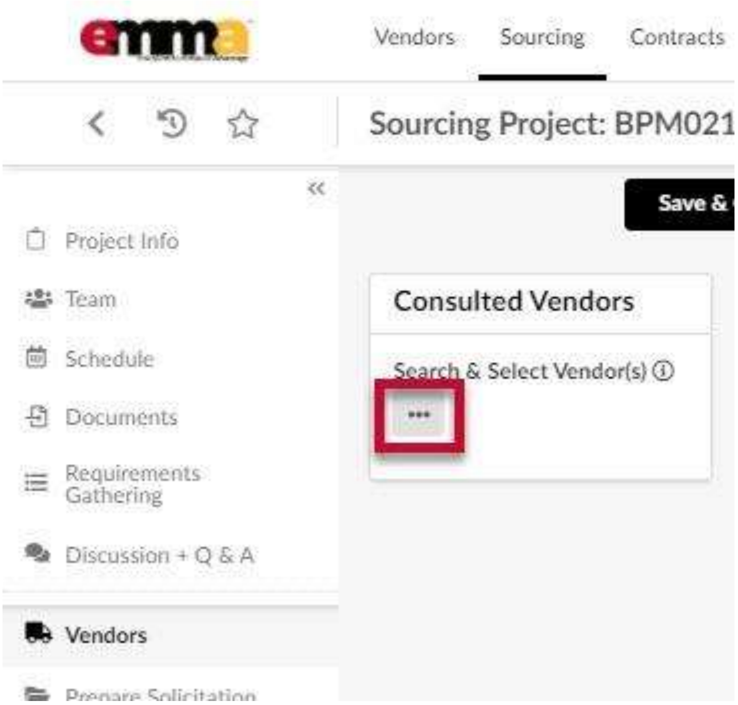


Figure 14: The ellipsis (three dots) icon in the Consulted Vendors section.

15. (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 16.
16. 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 that are relevant to your sourcing project to get a broader selection of vendors. You can add as many commodities as you want in this field.

    NOTE: It is a best practice to select as many commodities as possible to obtain a thorough vendor list.

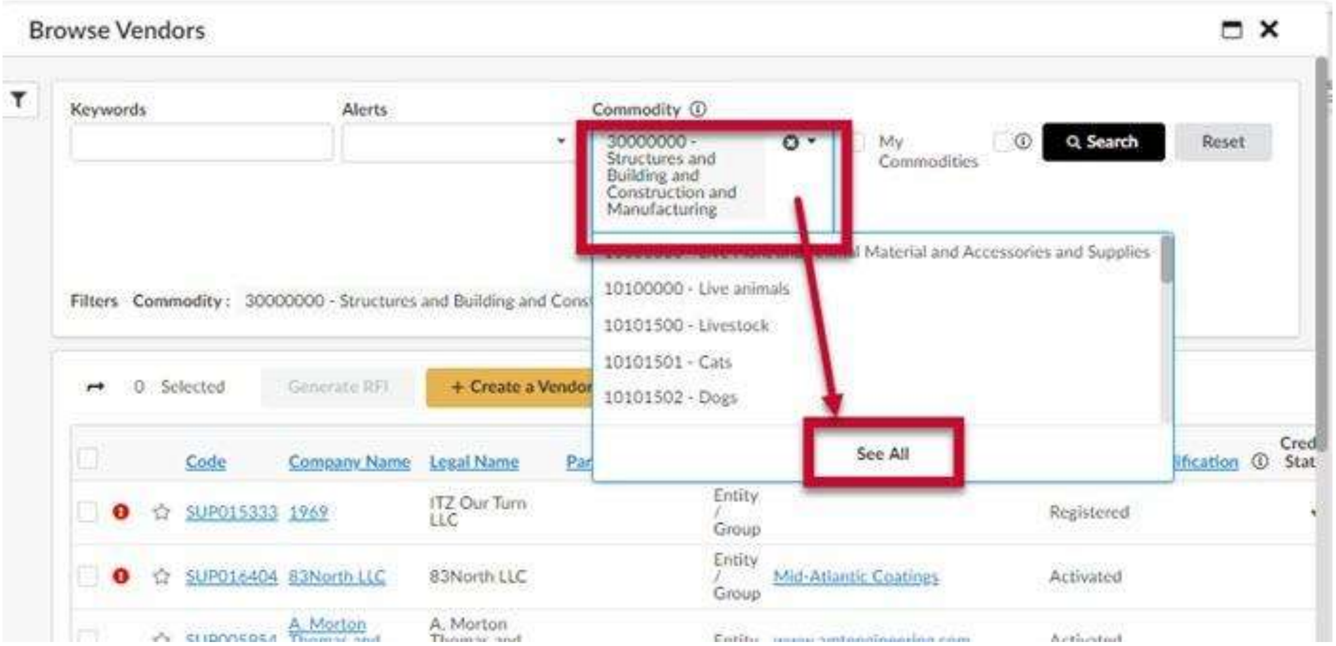


Figure 5: The Commodity field and the See All option in the drop-down menu.

17. 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.

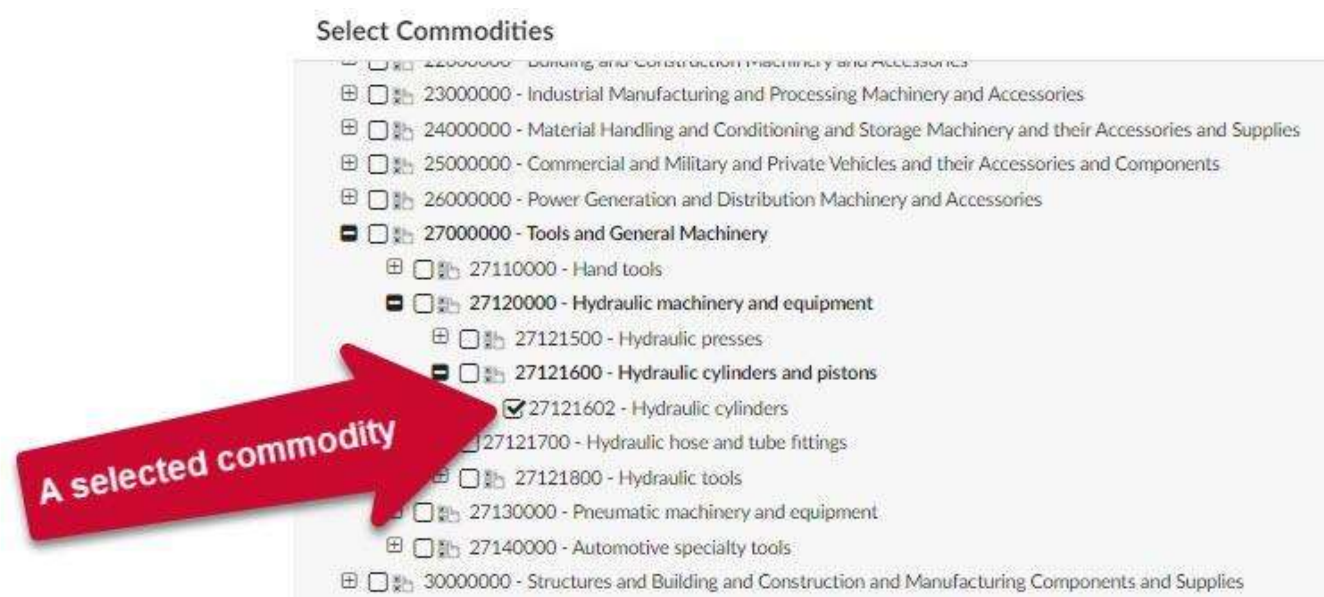


Figure 6: The Select Commodities window a selected commodity.

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

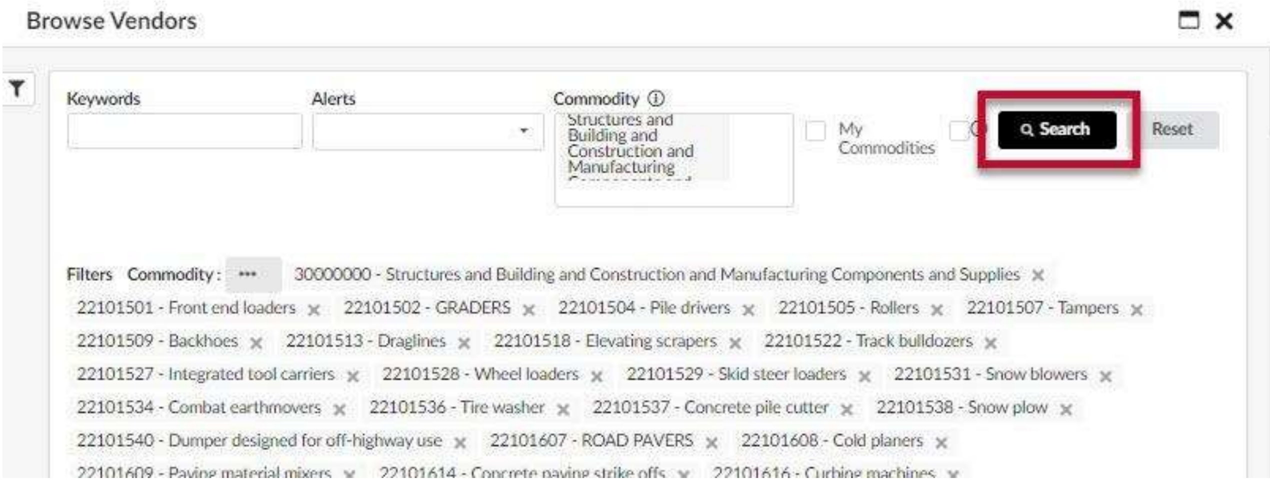


Figure 7: The Search button in the Browse Vendors window after adding commodities.

19. Scroll to the bottom of the Browse Vendors window and click the Settings (small gear) icon in the lower right-hand corner of the Browse Vendors window. A drop-down menu opens up.

NOTE: You may need to scroll horizontally to see the icon.

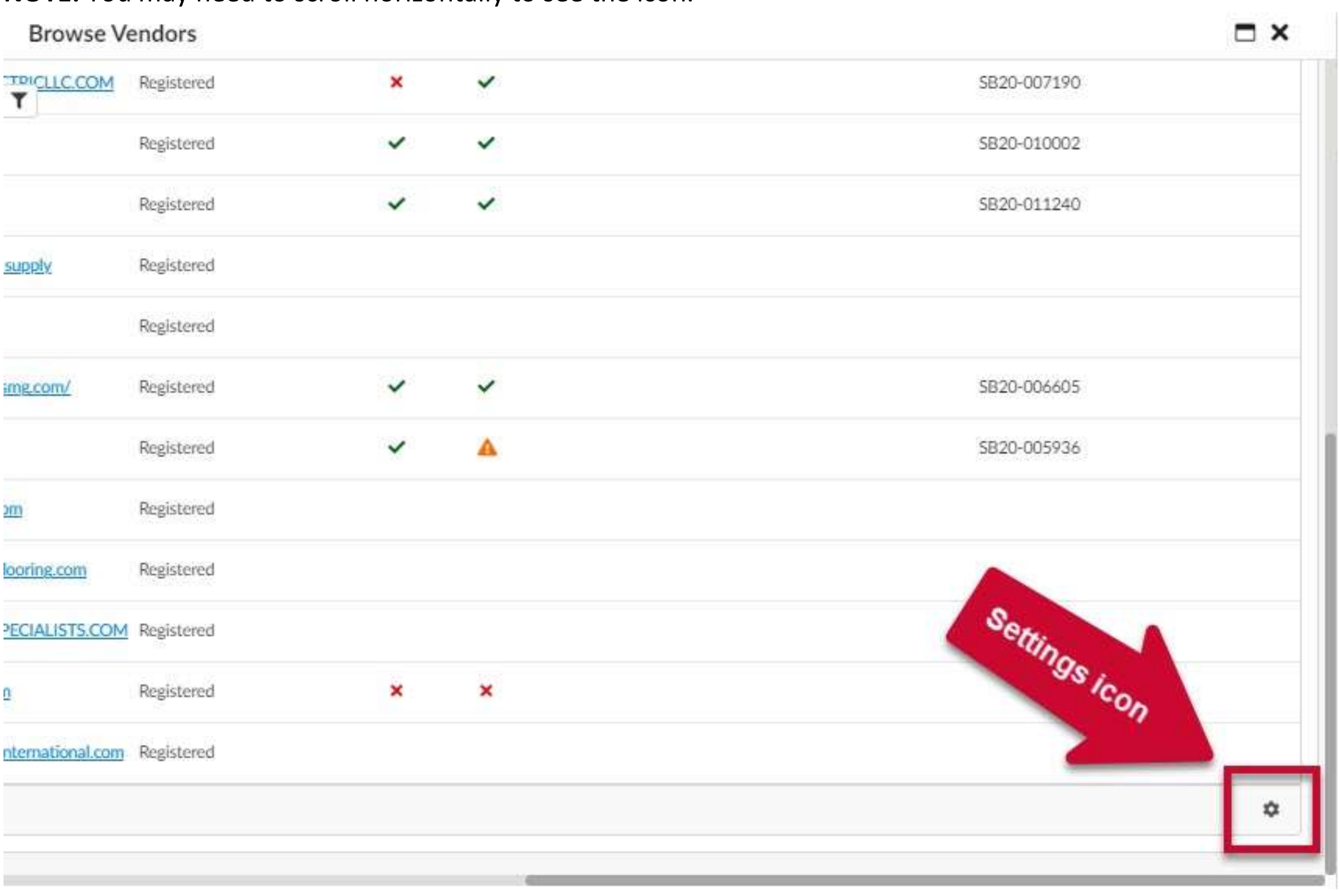


Figure 8: The Settings (small gear) icon in the lower right-hand corner of the Browse Vendor window.

20. In the **Grid page size** field enter a number (150 max) to see that many results listed in the Browse Vendors window and click the checkmark to the right of the field.

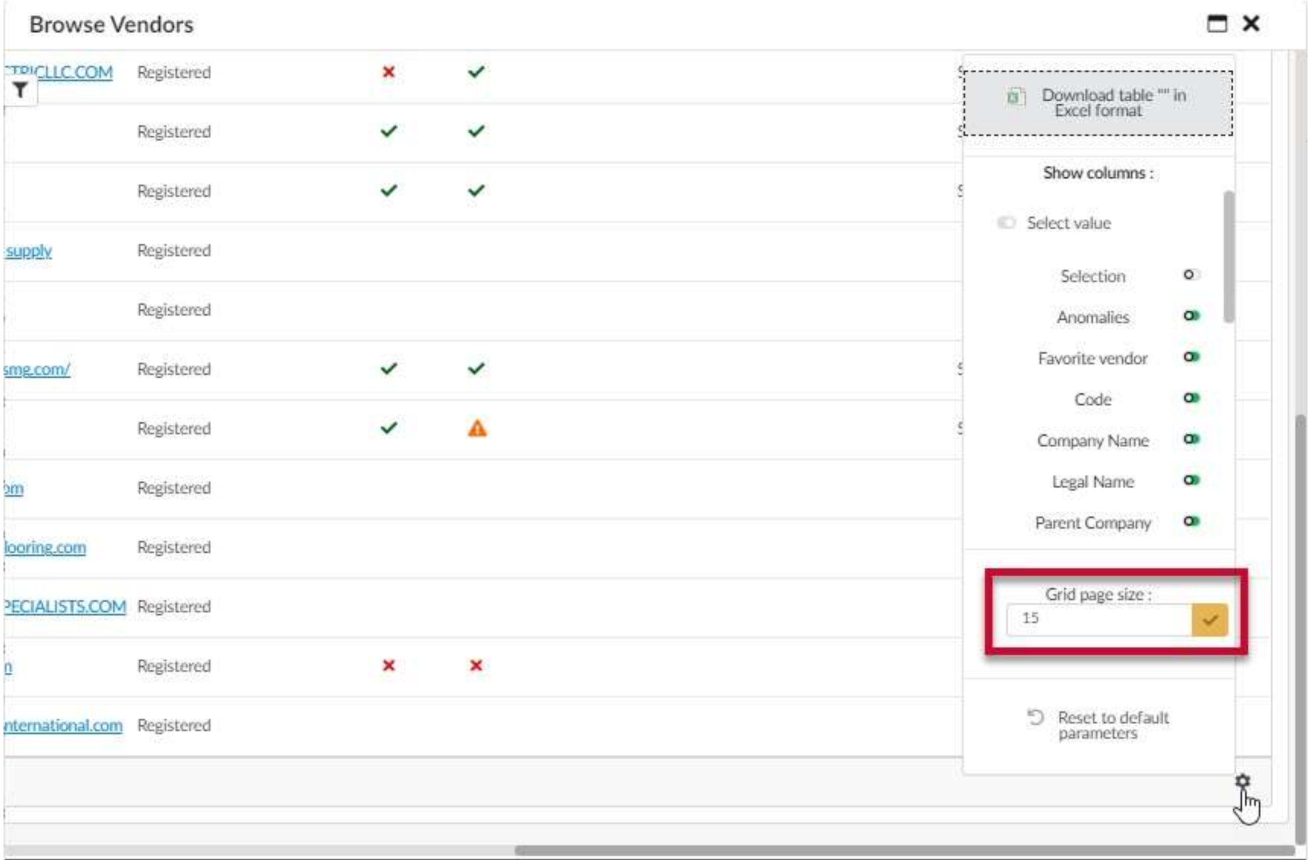


Figure 9: The Grid page size field in the pop-up menu.

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

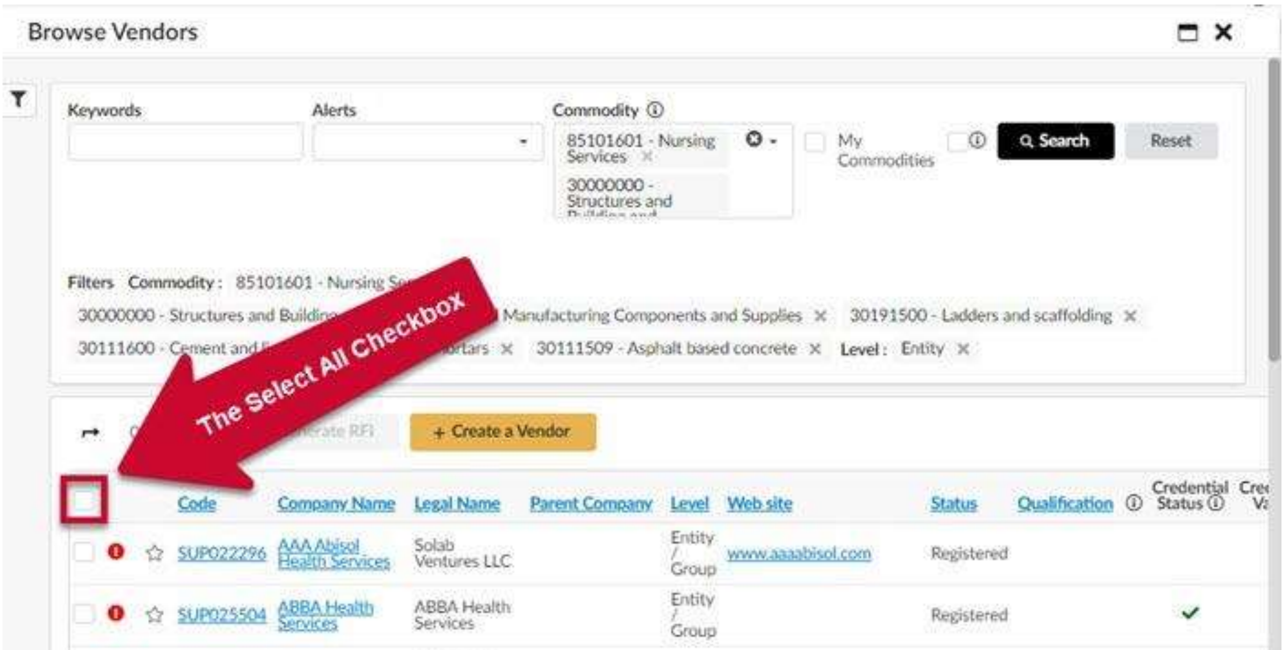


Figure 10: The topmost checkbox to the left of the column headers in the Browse Vendors window.

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

    NOTE: Skip this step if you don't see numbers at the bottom of the window.

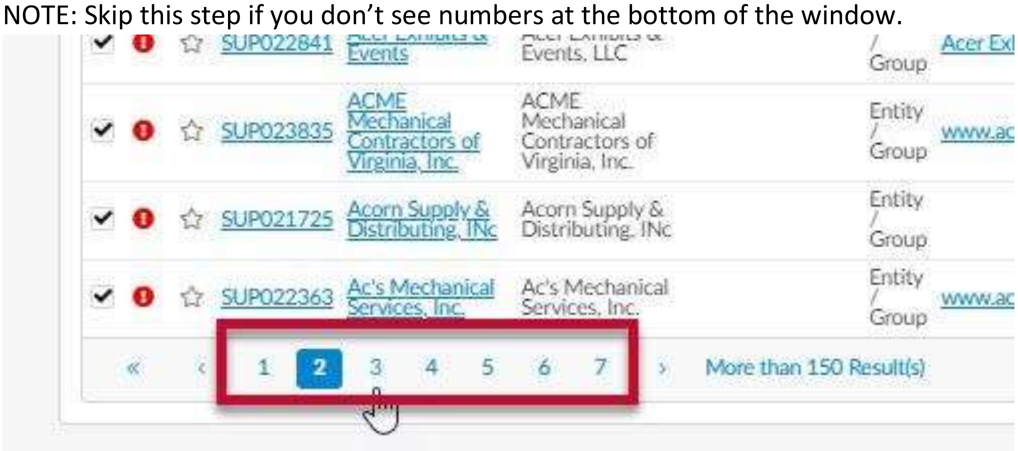


Figure 11: The page numbers for a list of Vendors in the Browse Vendors window.

23. Repeat Steps 21 and 22 until the Vendors on all pages are selected.
24. Close the **Browse Vendors** window. The Vendors are listed in the Consulted Vendors section.
25. 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.

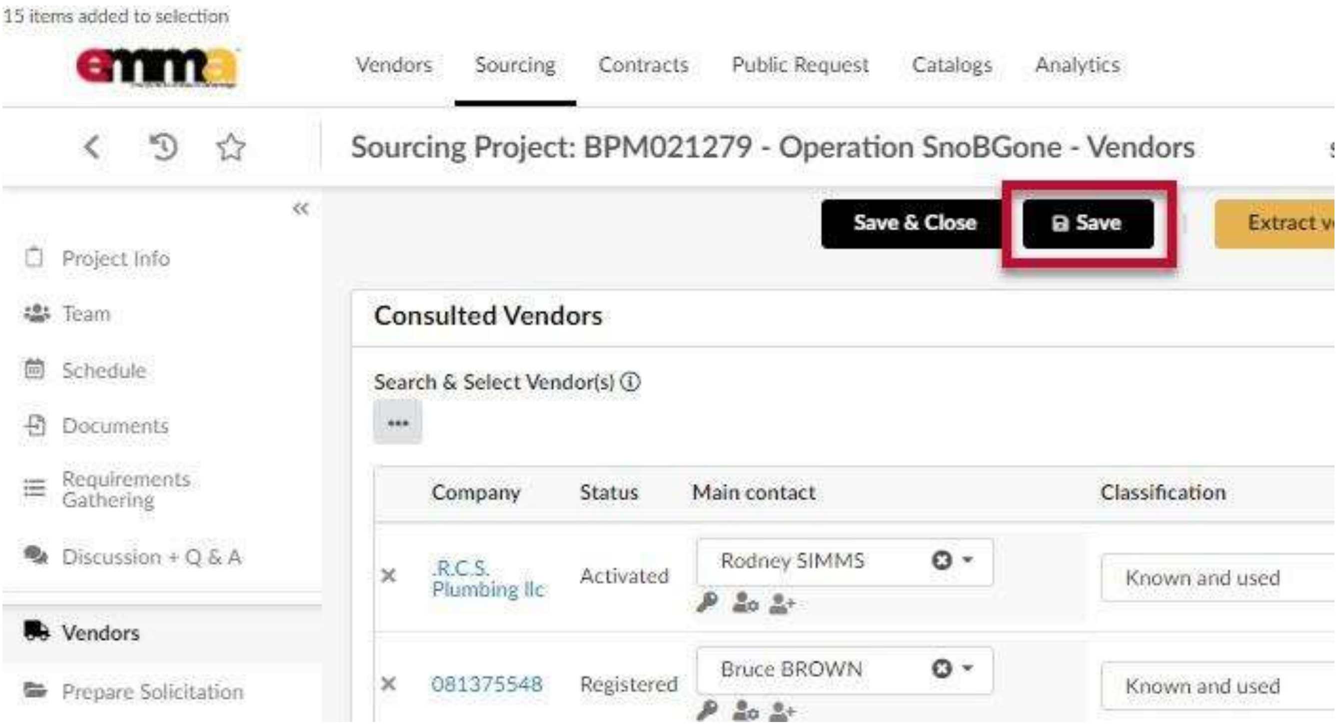


Figure 15: The Save button at the top of the page with added Vendors.

Prepare Solicitation – Setup

This process continues from the last step in the previous process

26. Click the **Prepare Solicitation** tab on the left-hand side-panel and locate the **Setup** subtab on the Prepare Solicitation page.

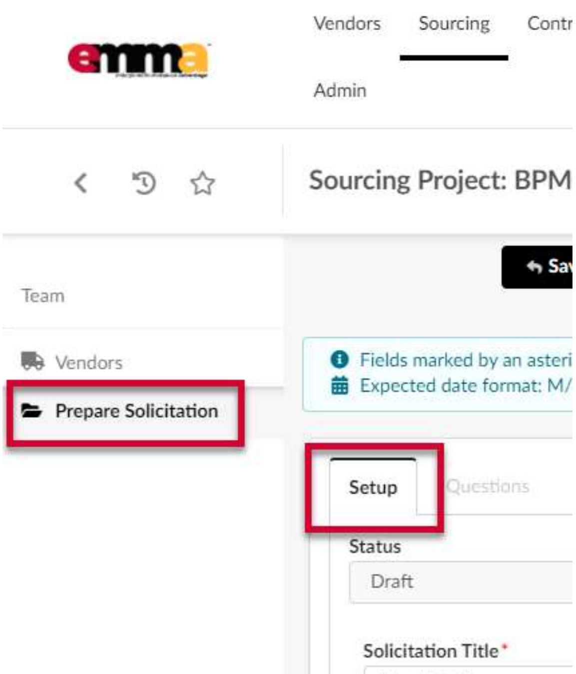


Figure 16: The Setup subtab on the Prepare Solicitation page.

27. Enter information in the form fields on the Setup subtab. A red asterisk (*) indicates a mandatory field.

NOTE: Additional fields may display depending on your selections.

Figure 17: The form fields in the Setup subtab for a sourcing project.

a. **Solicitation Title (*):** This field auto-populates with the title used for your sourcing project. You may change the solicitation title in this field if necessary.
b. **Template** (checkbox)**:** Click this checkbox if you want to use this solicitation as a template for future solicitations.
c. **Summary:** Enter a summary for your solicitation.

   NOTE: Vendors can view this summary.

d. **Additional Information & Instructions:** Enter any further need-to-know information or instructions for Vendors.
e. **Alternate Link:** Enter the link to the bid board on which this solicitation is posted, if applicable; i.e. BidExpress.
f. **Pre-Bid/Proposal Conference?** (checkbox)**:** Click this checkbox if you intend to have a Pre-Bid/Proposal conference for this solicitation. If you selected this checkbox, new mandatory fields display.

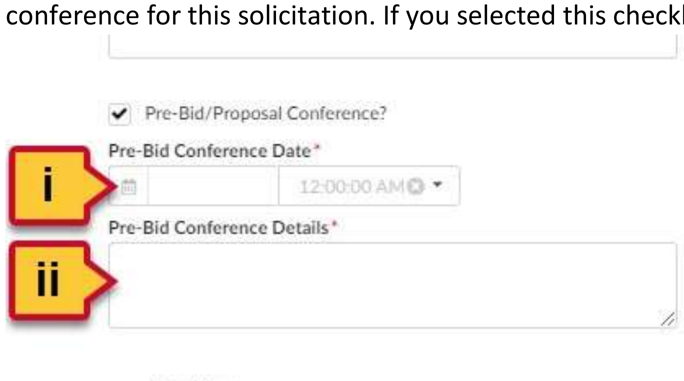


Figure 18: The Pre-Bid Conference fields that display when the Pre-Bid/Proposal Conference checkbox is selected.

   i. **Pre-Bid Conference Date (*):** Click this field and select the date of your pre-bid conference.
   ii. **Pre-Bid Conference Details (*):** Enter the details of your pre-bid conference, like when, where, how to register, what Vendors need, etc.

g. **Auto opening and Auto closure** (checkboxes)**:** Select the Auto opening checkbox **ONLY** if you selected a future date for your publish date. If selected, your bid period will publish automatically on the date you chose. The Auto Closure checkbox is preselected and cannot be changed.

h. **Due/Close Date (*):** Click this field and select the date that vendors can no longer submit responses.

i. **Due/Close Date (EST):** This field populates after you click Save. You do not need to do anything here.

j. **No end date:** Do you prefer to have an open end date? Click this field and select **Yes** from the drop-down menu. **No** is the default selection.

k. Public Visibility Dates
   i. **Public Portal Publish Date:** Click this field and select the date that you want to publish your solicitation in the public portal. Leave this field blank if you want to publish immediately.
   ii. **Public Portal Archive Date:** Click this field and select the date that you want to unpublish your solicitation in the public portal.

l. **Advanced options:** Click the arrow to the left of the Advanced Options section to open the options. Some checkboxes are preselected and cannot be changed. **Solicitation Visible to Public**, **Bid Holders List Visible to Public**. If the option for **Bid Holders List Visible to Public** is not selected, then click the checkbox to the left of it to select it.

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

Prepare Solicitation – Pricing

This section uses the Pricing subtab to show how to set up item pricing for your solicitation. This process continues from the last step in the previous process.

29. Click the **Pricing** subtab on the Prepare Solicitation page.

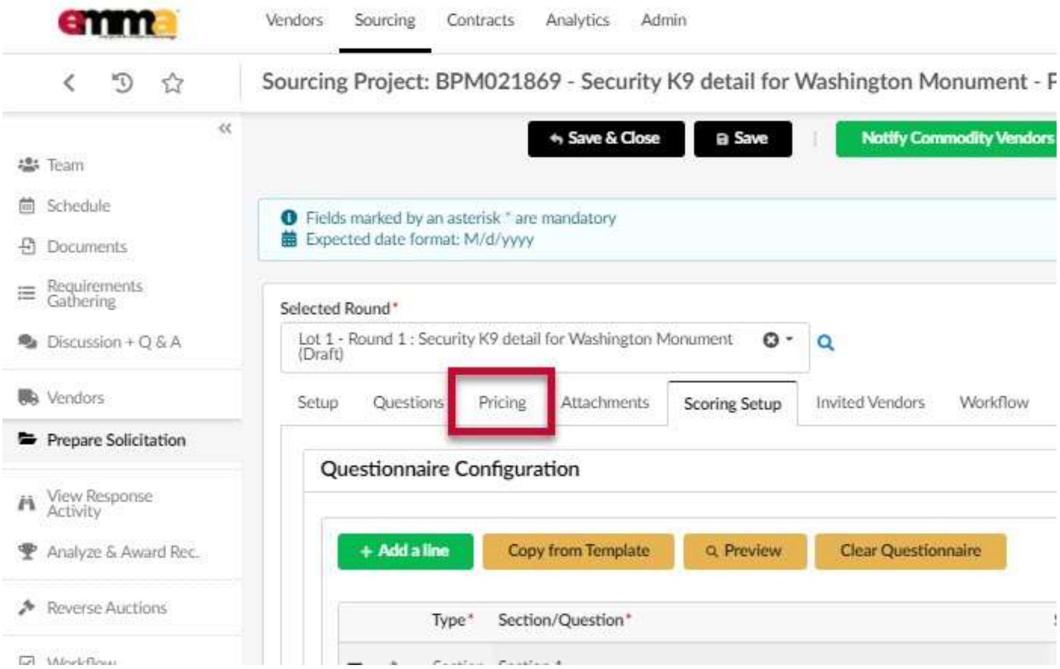
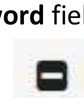


Figure 19: The Pricing subtab on the Prepare Solicitation page.

30. 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.

Figure 20: The form fields to create a line 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.
   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  and minus  icons to expand and

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.

NOTE: 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.

31. 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.

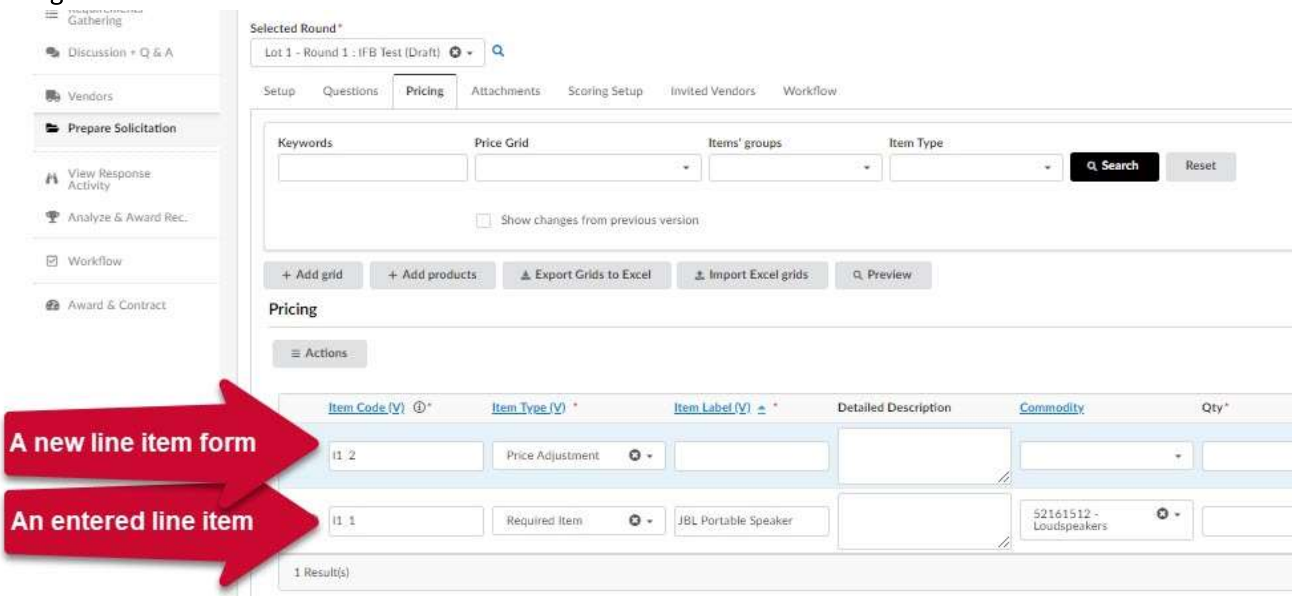


Figure 21: A blank line item above an entered line item in the Pricing subtab.

32. (Optional) Repeat Steps 30 and 31 to add new items, if necessary.
33. Click the **Save** button at the top of the Prepare Solicitation page.

Prepare Solicitation – Attachments

This section uses the Attachments subtab to show how to add attachments to your solicitation. This process continues from the last step in the previous process.

34. Click the **Attachments** subtab on the Prepare Solicitation page.

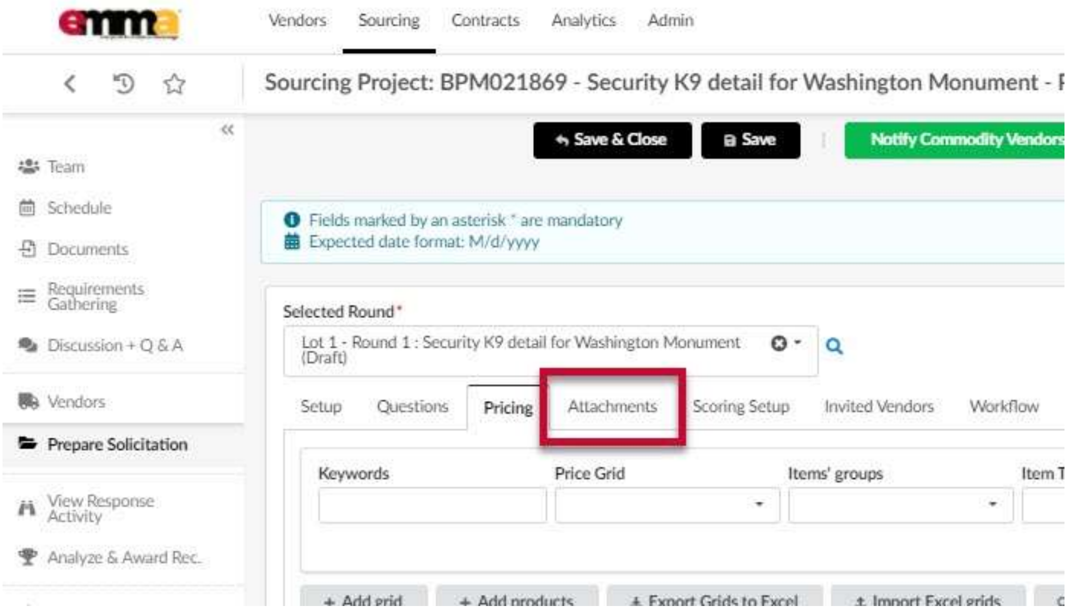


Figure 22: The Attachments subtab on the Prepare Solicitation page.

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

NOTE: Uploaded documents cannot exceed 300,000 KB.

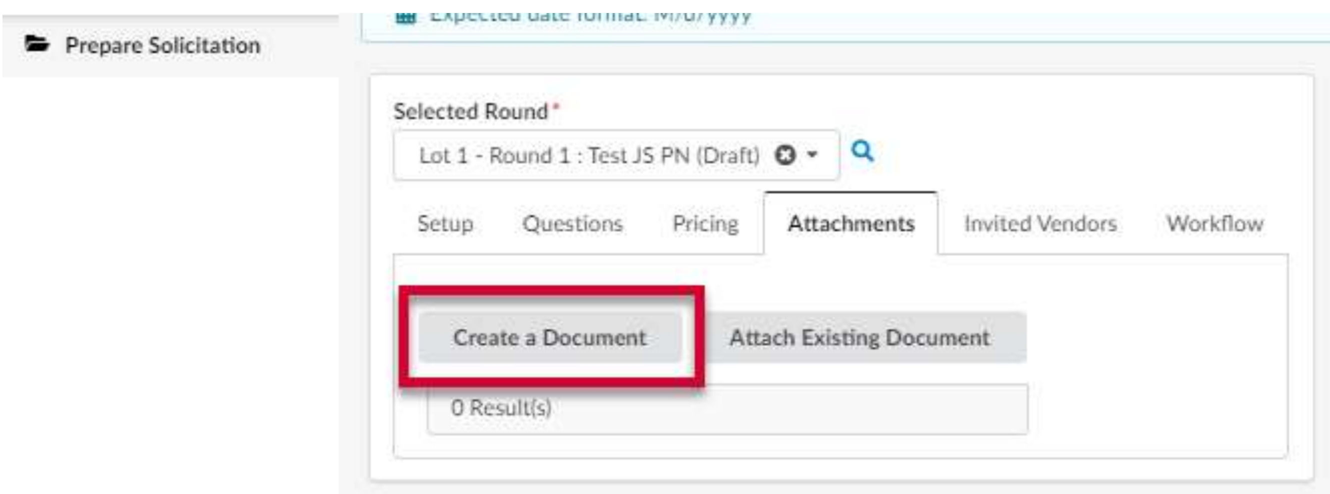


Figure 23: The Create a Document button in the Attachments subtab.

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

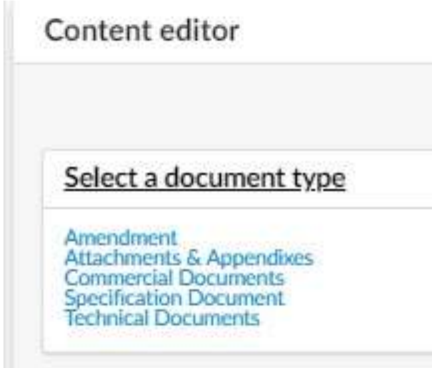


Figure 24: The links in the Content editor window.

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.

Figure 25: The Status field and the Approved option in the drop-down menu.

c. Click the **Save & Close** button at the top of the window. Your added document displays below the Attachment subtab.

36. 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.
37. Click the **Save** button at the top of the Prepare Solicitation page.
38. Click the **Invited Vendors** sub-tab and scroll to the bottom of the selected Invited Vendors list.

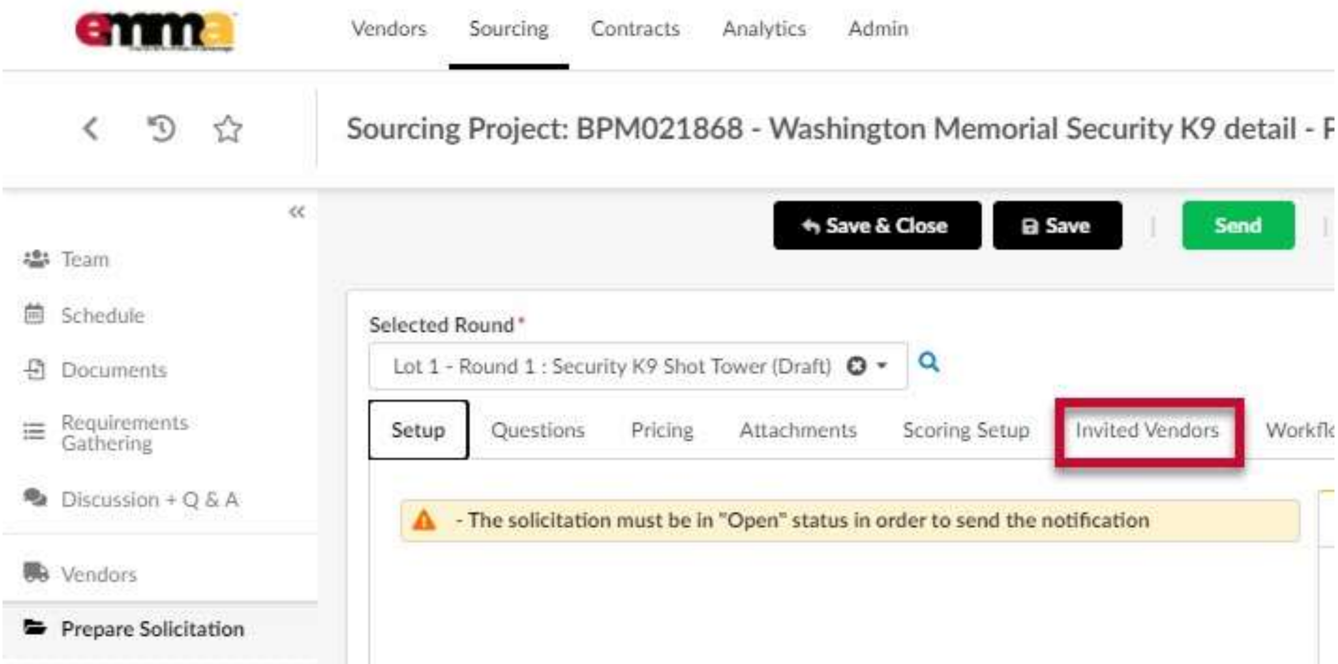


Figure 26: The Invited Vendors sub-tab on the Prepare Solicitation page.

39. Click the next page number of Vendors.

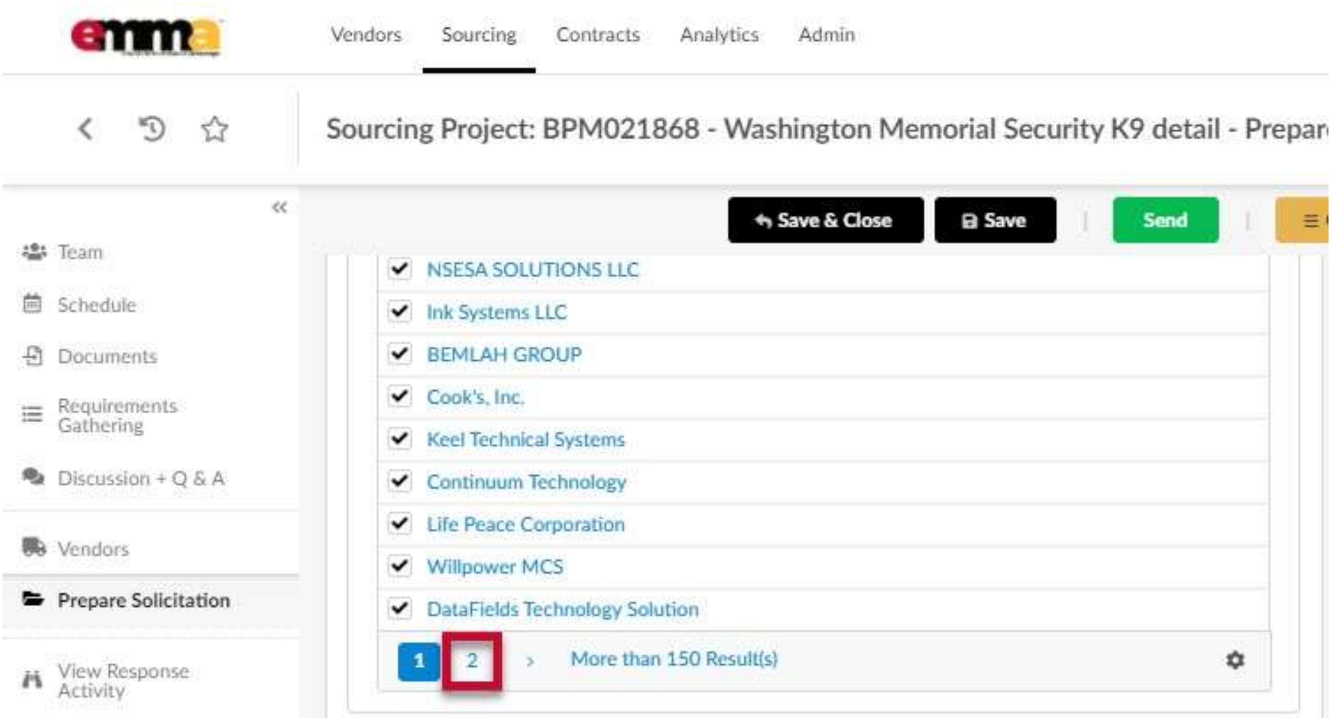


Figure 27: The next page number of Vendors for a solicitation in the Invited Vendors sub-tab.

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

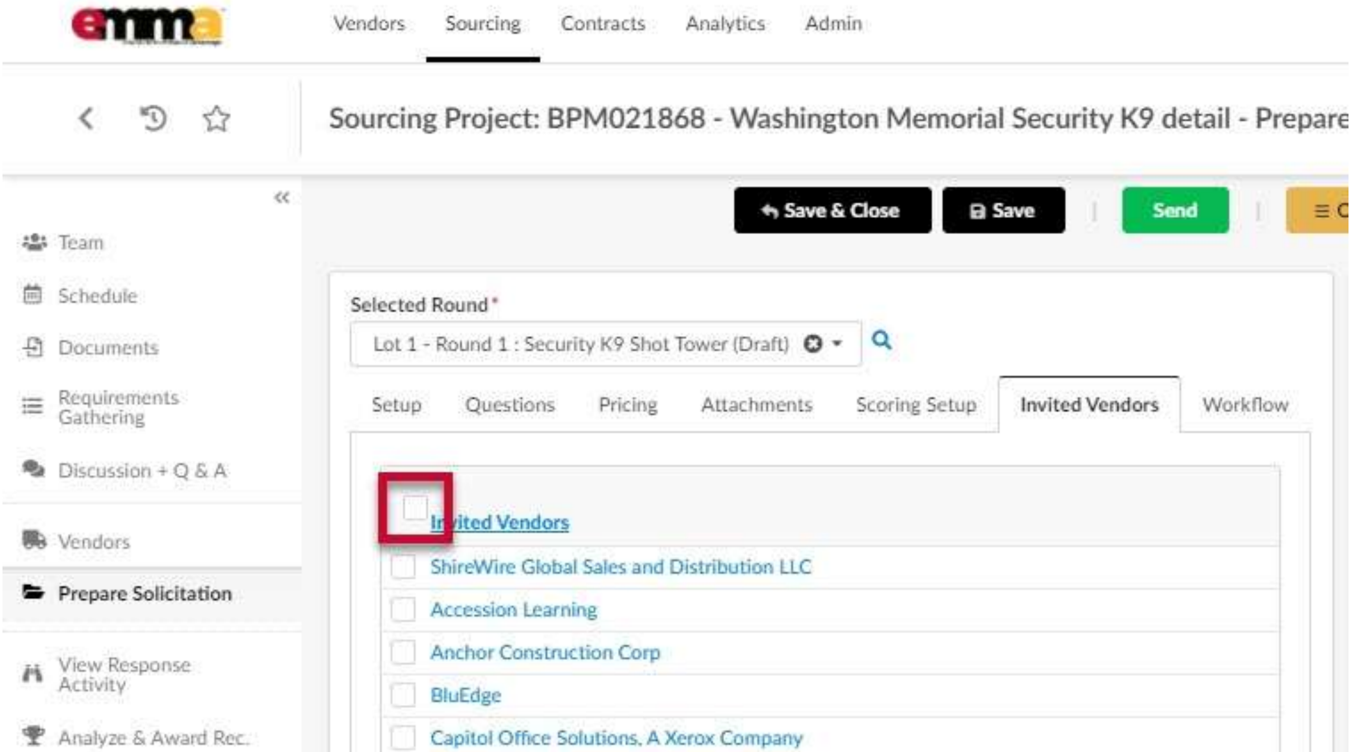


Figure 28: The checkbox to the left of the Invited Vendors column header.

41. Repeat Steps 39 & 40 until all your vendors are selected.
42. Click the **Save** button at the top of the page.
43. Click the green **Send** button at the top of the page. A new window opens. These Invited Vendors are those involved with direct soliciting, or a discrete/exclusive list such as the three Vendors required for small procurements or secondary competition selected resellers.

    You can use this button to "send" a notification to the Invited Vendors ahead of the set opening day/time of your solicitation, as a heads up.

    NOTE: You **must** have at least one Vendor selected in the Invited Vendors subtab to use this button.

    NOTE: You can attach relevant documents to this message as well, although it is recommended to not attach any documents at this step. By not attaching documents to these emails, it requires the Vendors to go to the eMMA website and download them from there, which is preferrable.

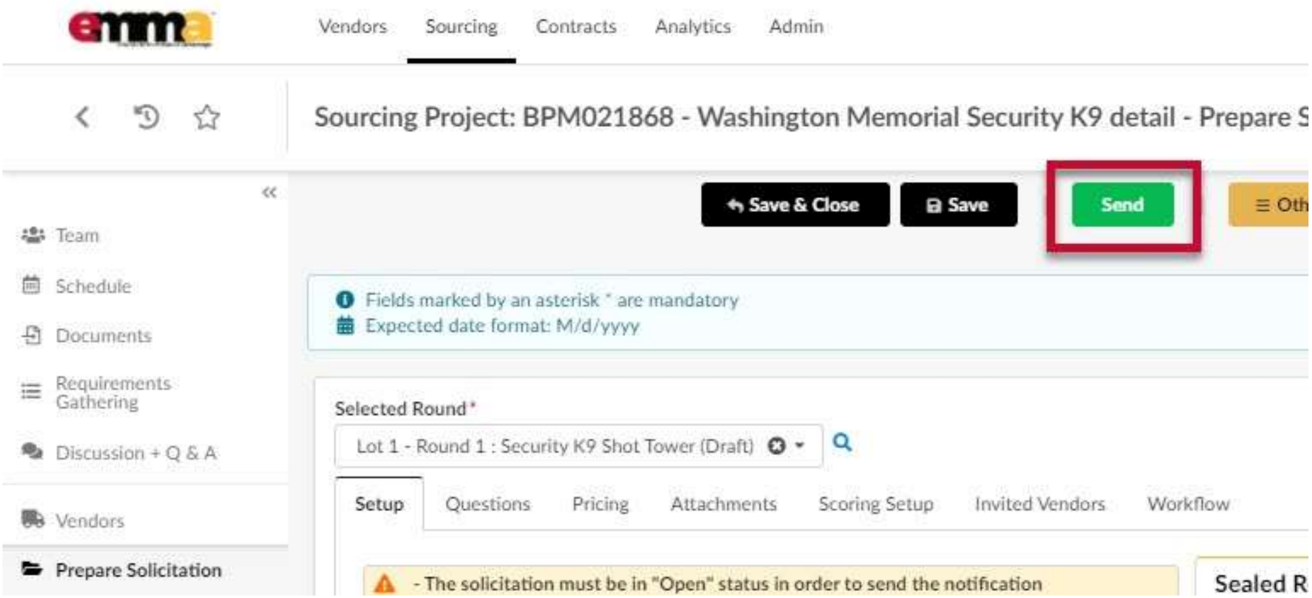


Figure 29: The green Send button at the top of the Prepare Solicitation page.

44. Adjust any settings in this window and click the **Send and Close** button. A prompt displays asking you to confirm; click **OK**. If your publish date is active or blank, another prompt displays to ask if you want to open the response period; Opening the response period means that the solicitation is publicly advertised, and that Vendors can bid on it. Click **OK**.

Figure 30: The Send and close button in the Solicitation window.

45. Click the **Notify Commodity Vendors** button at the top of the page to notify **all** Vendors in the selected commodity codes of the new solicitation.

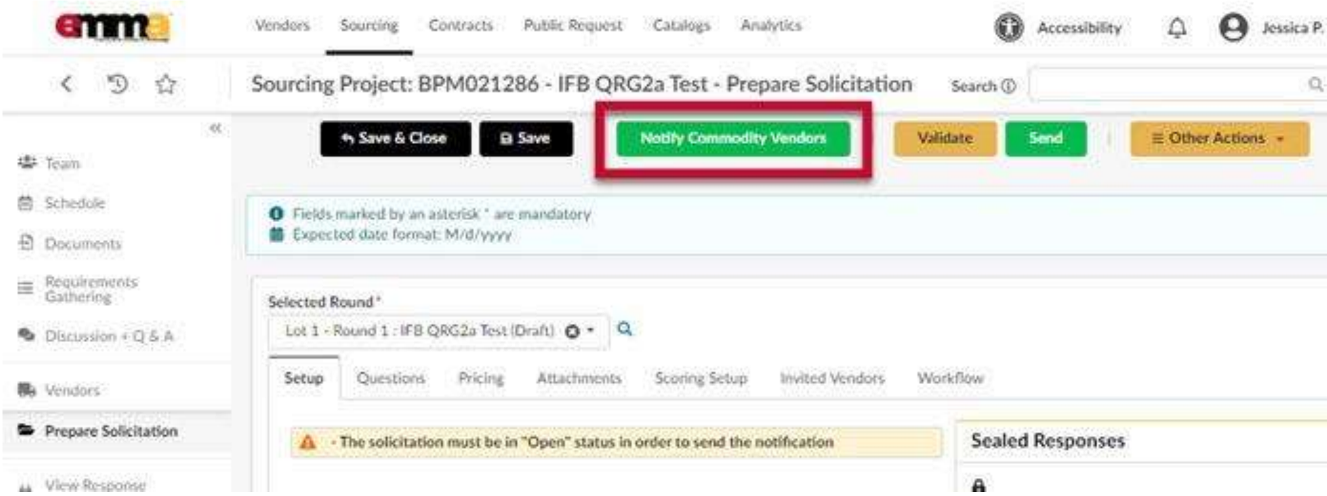


Figure 31: The Notify Commodity Vendors button at the top of the screen.

46. Click the **Publish Notification** button at the top of the page. A prompt displays letting you know the solicitation needs to be open; click **OK**. This final button officially publishes your solicitation on eMMA for the public to see. Now, all vendors in your sourcing project's commodity(ies) were notified of the solicitation and it is ready to be bid on.

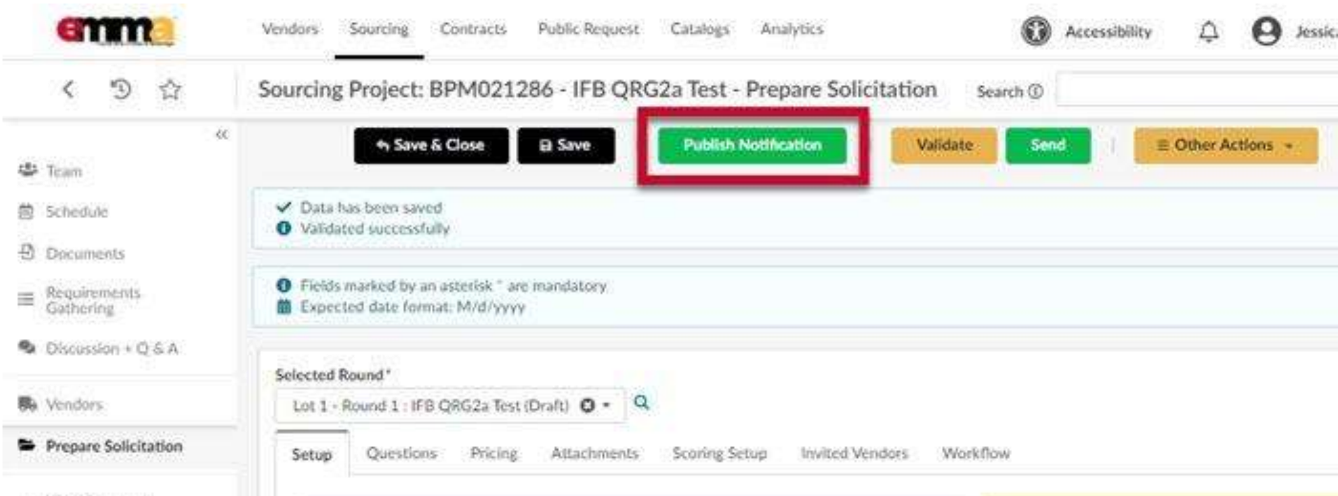


Figure 32: The Publish Notification button on the Prepare Solicitation page

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

Next Steps