



Create a Sourcing Project in eMMA Quick Reference Guide

Overview

This Quick Reference Guide (QRG) is intended for Procurement Officers/Buyers who want to use the eMaryland Marketplace Advantage (eMMA) to create a Sourcing Solicitation/Project. These instructions show how to create a sourcing project in eMMA.

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



Step-by-Step Instructions

Training Video for Creating an IFB Sourcing Project in eMMA

<https://youtu.be/S8IHZNH2LzU>

Create an IFB Sourcing Project in eMMA

NOTE: This QRG uses diagrams with specific callouts to show required and optional fields in forms. A yellow callout with

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

NOTE: Additional fields may display depending on your selections.

NOTE: If you want to create a Sourcing Project from a Business Request, see the Business Request QRG, Steps 21-23.

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.

- Click the **Sourcing** tab at the top of the screen and select **Create Project** from the drop-down menu that opens.

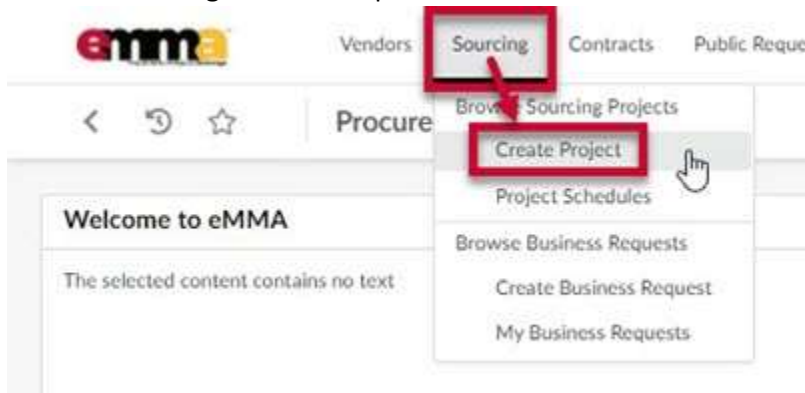


Figure 1: The Sourcing tab and Create Project option in eMMA.

- 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 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 **IFB: Invitation for Bid (LP)** project type.
- d. **Project Start Date (*):** Click this field to select a date on which to start the project.
- e. **Linked Business Requests:** Click this field to search for a Business Request you need to link to your new sourcing process.


NOTE: Clicking **See All** opens a window in which all Business Requests are listed. Search for a term in the **Keywords** field and click the **Search** button to return relevant results. Select a business request from this list and close the window. The business request populates in the field.


- f. **Project Title (*):** Enter a title for your IFB 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. Select a category from this list and close the window. The category auto-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) auto-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. Select an agency from this list and

close the window. The selected agency auto-populates in the field.

- I. **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. 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 and close the window. 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.

The image shows a screenshot of the 'Additional Information' section in the eMMA system. It features several dropdown menus, each highlighted with a yellow callout box containing a letter from 'a' to 'g'. The fields are: 'Federal Funding?*' (a), 'SBR Designation*' (b), 'Project Estimate' (c), 'Project Cost Class' (d), 'MBE Goal?*' (e), 'VSBE Goal?*' (f), and 'Grant Funding?*' (g). The 'Grant Funding?*' dropdown is currently set to 'No'. The asterisks on 'Federal Funding?', 'SBR Designation*', 'MBE Goal?', and 'VSBE Goal?' indicate they are required fields.

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. Enter information in the **Apparent Awardee Approver Criteria** section. A red asterisk (*) indicates a required field. The diagram below shows required fields described in more detail below.

NOTE: Depending on your selected project type, you may not see the same options as what’s discussed below.

IMPORTANT!! Make sure the selections in the Apparent Awardee Approval Criteria are correct **before you finish** entering information. **You cannot change these selections once the Sourcing Project is created.**



Figure 5: The Apparent Awardee Approval Criteria section and required fields to create a Sourcing Project in eMMA.

- a. **Fiscal Officer Approval? (*)**: Does your project need approval by a Fiscal Officer? Click this field and select **Yes** or **No**.

- b. **Legal Approval? (*)**: Does your project need Legal approval? Click this field and select **Yes** or **No**.
 - c. **Agency Head Approval? (*)**: Does your project need Agency Head approval? Click this field and select **Yes** or **No**.
 - d. **Procurement Leadership Approval? (*)**: Does your project need Procurement Leader approval? Click this field and select **Yes** or **No**.
6. Click the **Save & Close** button at the top of the page.



Figure 6: The Save & Close button at the top of the Create Sourcing Project page.

You have completed the first steps for your Sourcing Project.

Next Steps

Your next step is to set up your Team for the project. Navigate to the QRG Create a Sourcing Project Team.

NOTE: Depending on the project type you selected, you may not need to set up a Team.