Business Requests in eMMA

Quick Reference Guide

Overview

Business Owners can now initiate sourcing projects through Business Requests in the eMaryland Marketplace Advantage (eMMA). This allows a solicitation to be traced back to the original business need. Also, the original funds certification within the Business Requests are used to establish Master Agreements and drive Secondary Competition procurements for individual Requests for Proposals (RFPs) and Invitation for Bids (IFBs).

This Quick Reference Guide (QRG) is intended for Business Owners within eMMA. It includes instructions as well as training videos that show how to:

- create a Business Request in eMMA,
- browse Business Requests, and
- filter Business Requests in eMMA.

NOTE: Depending on your role in eMMA, your screen may vary from the images shown in this QRG.

Training Videos

https://youtu.be/YWAfA8SCTHg

Step-by-Step Instructions

Create a Business Request in eMMA

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 web page to open a drop-down menu and select the **Create Business Request** option.

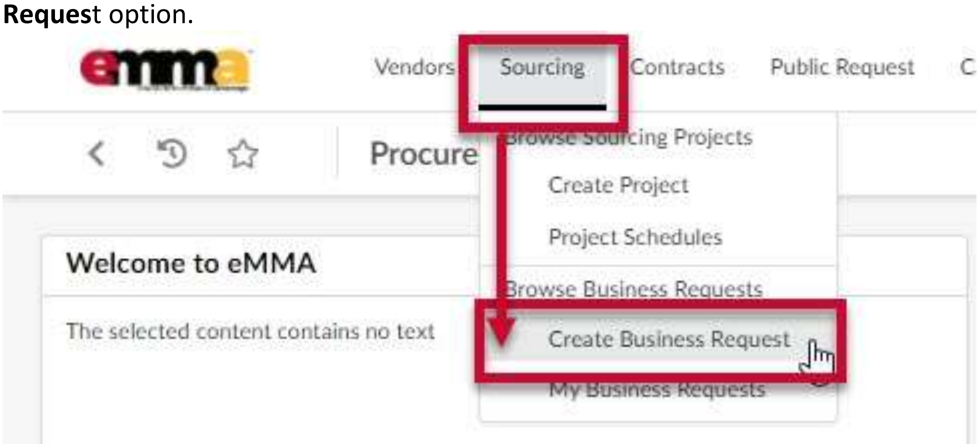


Figure 1: The Sourcing tab and the Create Business Request option in the drop-down menu.

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

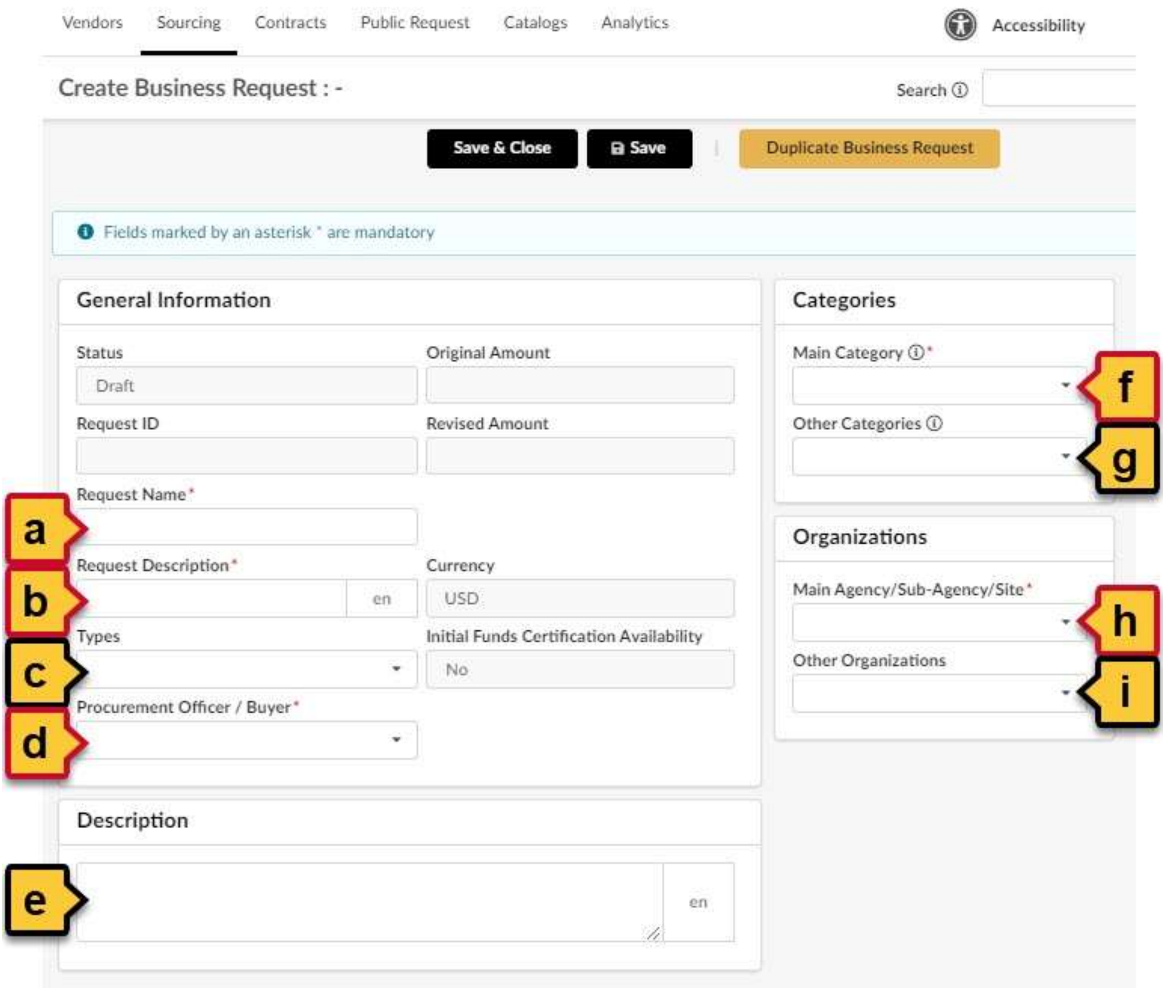


Figure 2: The form fields to create a Business Request.

a. **Request Name (*):** Enter a name for your business request in this field.

b. **Request Description (*):** Enter a description for your request in this field.

c. **Types:** Click this field and select a type from the drop-down menu
   i. Corporate
   ii. Goods
   iii. New Product Introduction
   iv. Purchase
   v. Services

d. **Procurement Officer/Buyer (*):** Enter the name of the Procurement Officer you intend to use in this process.

e. **Description:** Enter a longer description in this field, if desired.

f. **Main Category (*):** Enter the name of your Main Commodity Category that matches your United Nations Standard Products and Services Code (UNSPSC) in this field and select it from the drop-down menu that opens. This should be the Commodity Category that best matches your business or organization. If you need help finding your UNSPSC code, visit the UNSPSC website to search directly for an appropriate code, https://www.unspsc.org/search-code. You can only add one Category in this field.

NOTE: You can also click **See All** at the bottom of the drop-down menu.

g. **Other Categories:** The commodities selected here must match the codes in the UNSPSC as closely as possible, and you should select any and every code that applies to your project. If you need help finding applicable UNSPSC codes, visit the UNSPSC website to search the entire list, https://www.unspsc.org/search-code. Click this field to open the drop-down menu and click the **See All** option at the bottom. A new window opens and lists all commodities. Use the plus and minus icons to the left of the Category groups to expand and collapse them. Select the checkboxes to the left of the commodity(ies) you want to add and close the window. The selected commodities auto-populate in the Other Category field.

   IMPORTANT: It is crucial to make sure you add any and every commodity that applies to your project in this field. It ensures your project receives attention from a broad range of appropriate and qualified vendors.

h. **Main Agency/Sub-Agency/Site (*):** Enter the main agency, site, or sub-agency responsible for this business request. You can also search for the agency by clicking **See All** at the bottom of the drop-down menu.

i. **Other Organizations:** If necessary, enter one or more other organizations related to this project. You can also search for an agency by clicking **See All** at the bottom of the drop-down list.

4. Click the **Save & Close** button above the panes to save your Business Request. Click **OK** in the prompt that appears. Your Business request information displays on the Identity page.

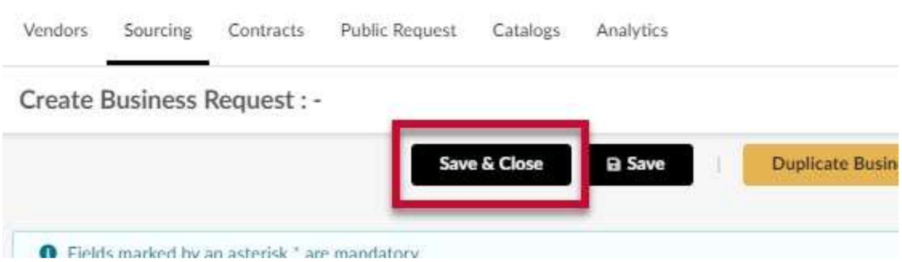


Figure 3: The Save & Close button on the Create Business Request page.

5. Click the **Original Amount** field and enter the amount of funds required for this project and click the **Save** button at the top of the page.

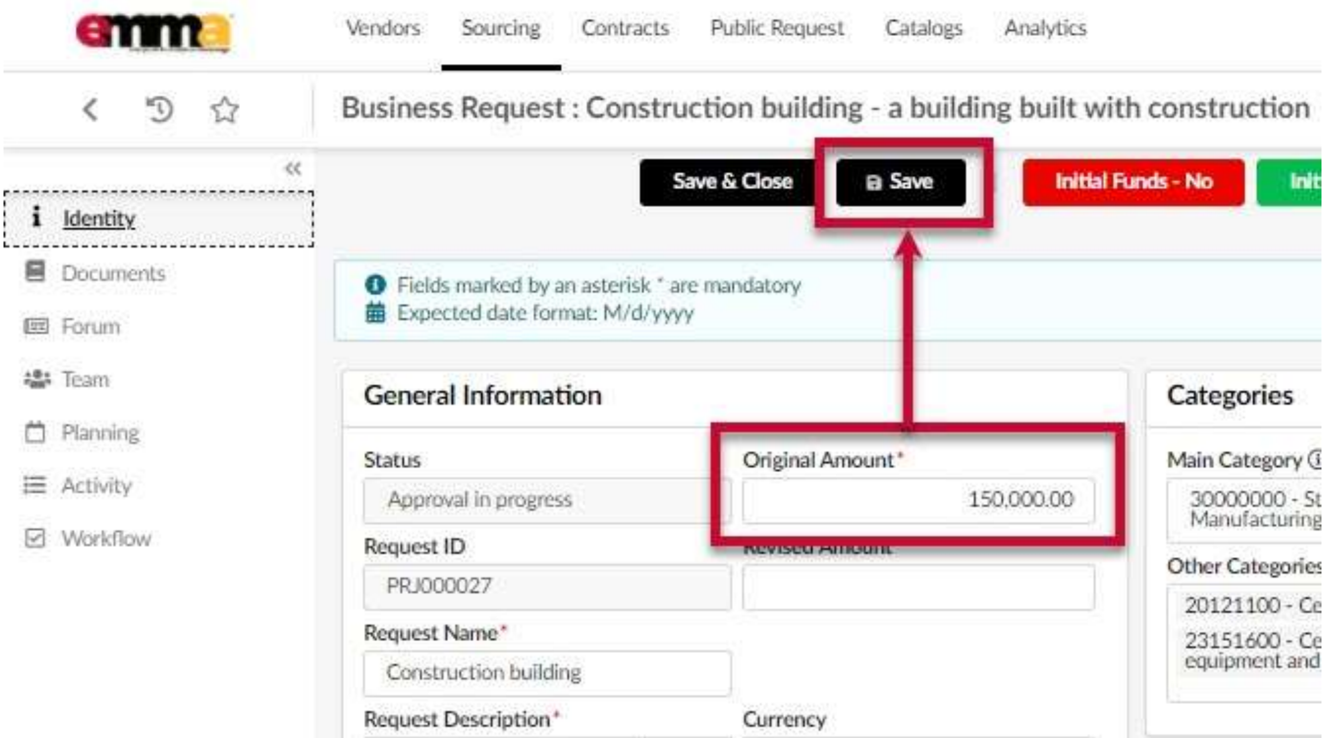


Figure 4: The Original Amount field and the Save button on the Identity page.

6. Click the **Documents** tab in the left-hand side-panel and click the **Create a Document** button. A pop-up window opens.
7. Click the **Funding Document(s)** link in the pop-up window. The Funding Document(s) window opens.

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

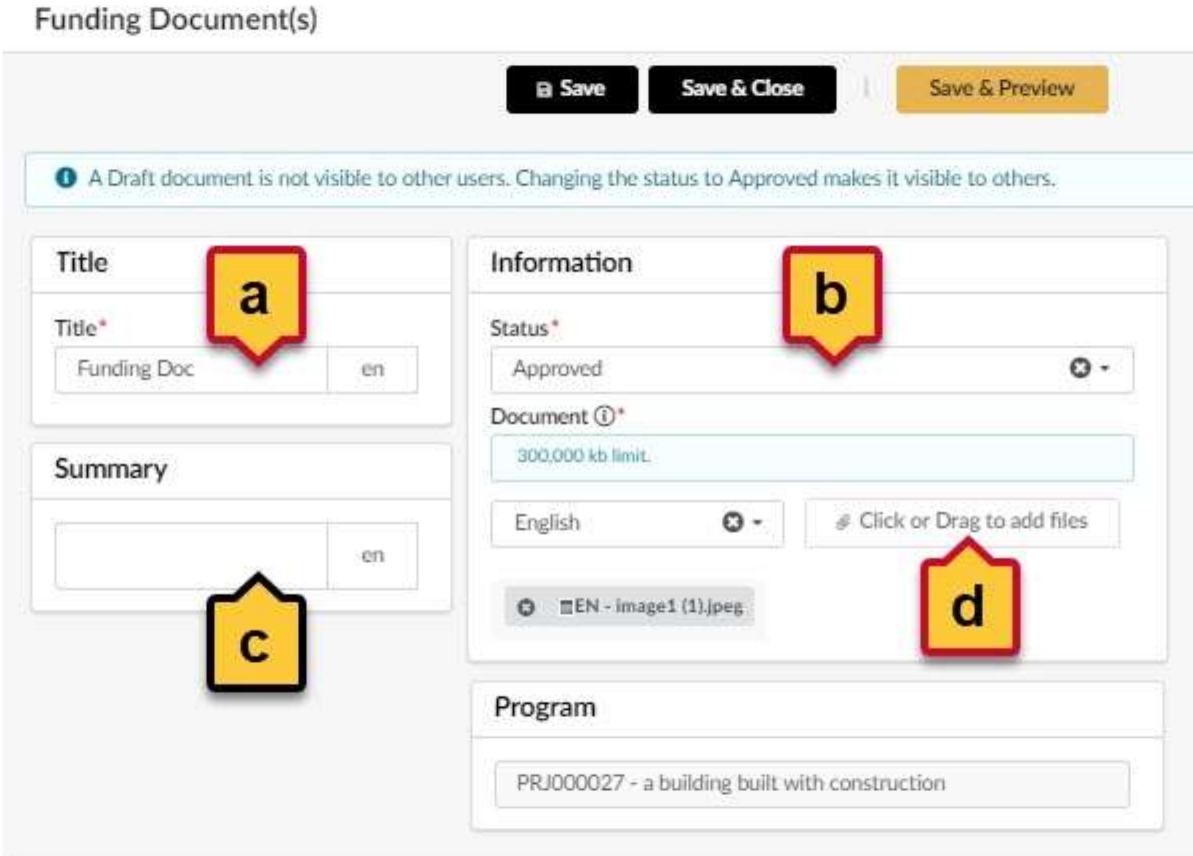


Figure 5: The form fields for the Funding Document(s) window.

a. **Title (*):** Enter a title for the funding document in this field.
b. **Status (*):** Click this field to open the drop-down menu and select the **Approved** option.
c. **Summary:** Enter a brief summary of your funding document in this field.
d. **Click or Drag to add files (*):** Click this button to add files from your device or drag-and-drop files over this button to add them.

   NOTE: Uploaded files cannot exceed 300,000 KB.

9. Click the **Save & Close** button at the top of the Funding Documents window. The funding document displays on the Documents page.
10. Click the **Workflow** tab in the left-hand side-panel.

11. Click the **Initial Funds - Yes** button at the top of the Workflow page. A prompt displays. Click the **OK** button in the prompt.

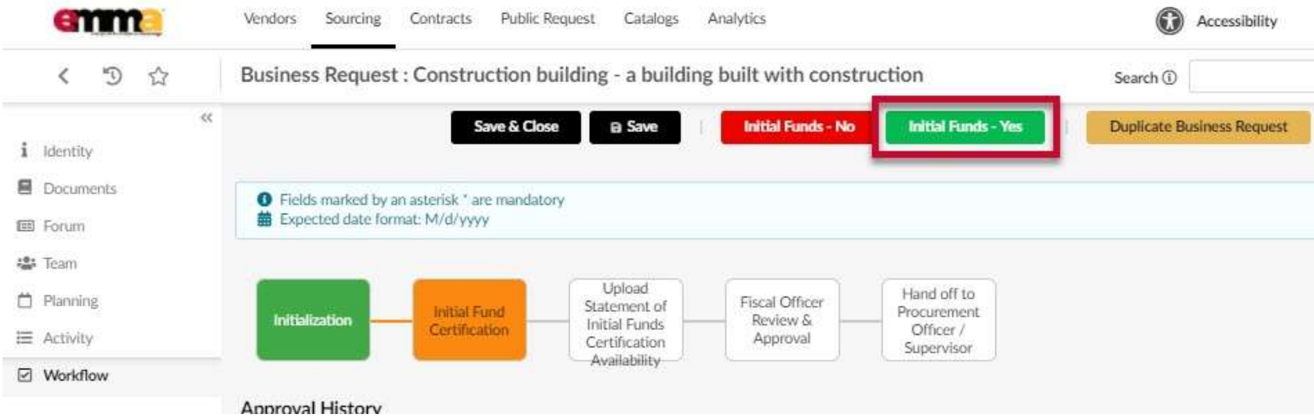


Figure 6: The Initial Funds - Yes button on the Workflow page.

12. Click the **Document Attached** button at the top of the Workflow page.

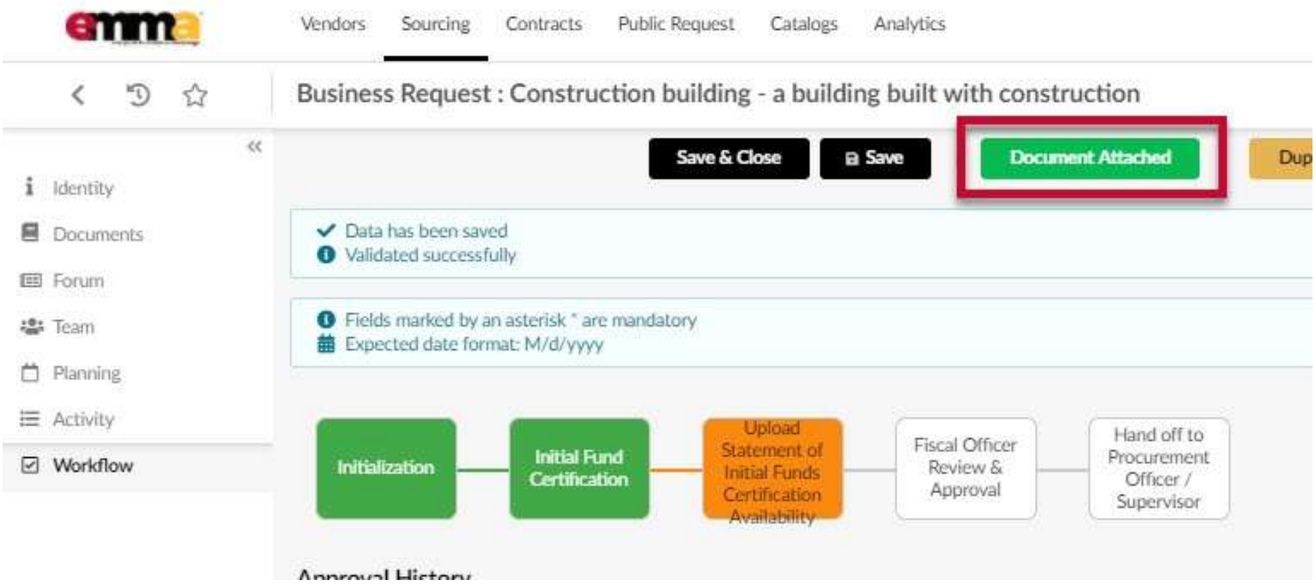


Figure 7: The Document Attached button in the Workflow tab for a Business Request.

13. Click the **Save** button at the top of the Workflow page. Your Business Request is created and sent to the Fiscal Officer for review and approval. The Fiscal Officer receives an email and a notification in eMMA that they need to approve your Business Request. Once the Fiscal Officer approves the Business Request, it comes back to you,

as the Business Owner, to do the final step of "Handing off to the Procurement Office / Supervisor."

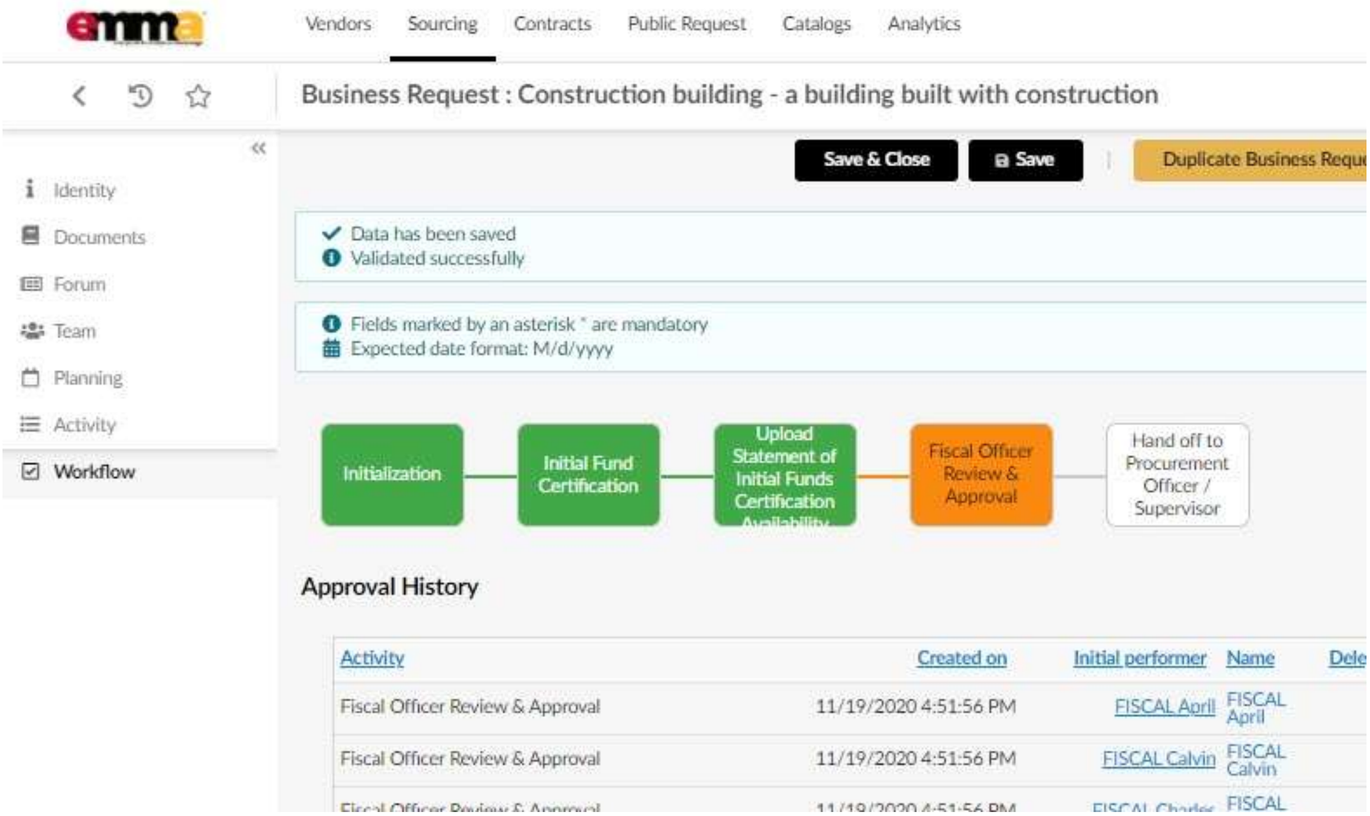


Figure 8: The Workflow for a Business Request sent for Fiscal Officer approval.

14. Click the **Identity** tab on the left-hand side-panel and check to make sure the **correct** Procurement Officer is populated in the **Procurement Officer/Buyer** field.

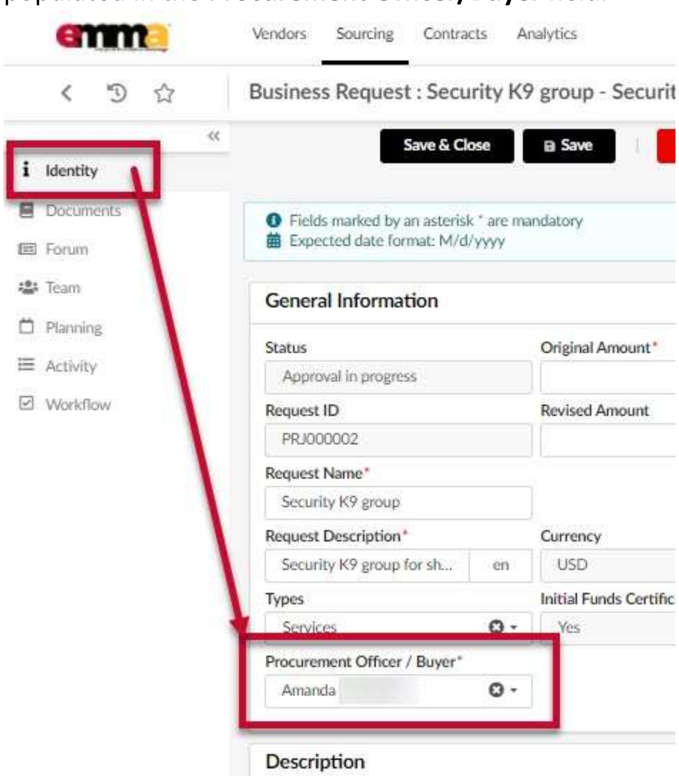


Figure 9: The Identity tab and the Procurement Officer/Buyer field.

15. Click the **Team** tab on the left-hand side-panel. By default, your name is listed with the **Responsible (Program)** role assigned. The Procurement Officer must be assigned the Responsible (Program) role.

    NOTE: You can only assign one user the Responsible (Program) role for Business Requests.

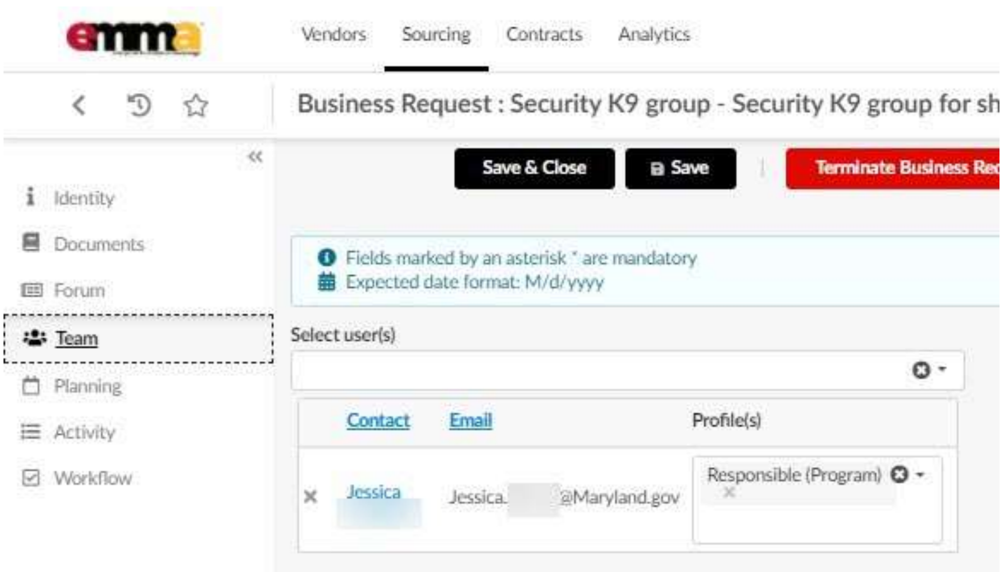


Figure 10: The Team page for a Business Request with the default user listed.

16. If you *are* the Procurement Officer for this Business Request, then skip to Step 17. If you need to add the Procurement officer to this list, complete Steps 16a-16f.
    a. Click the **Selected user(s)** field above the team list and search for your Procurement Officer.

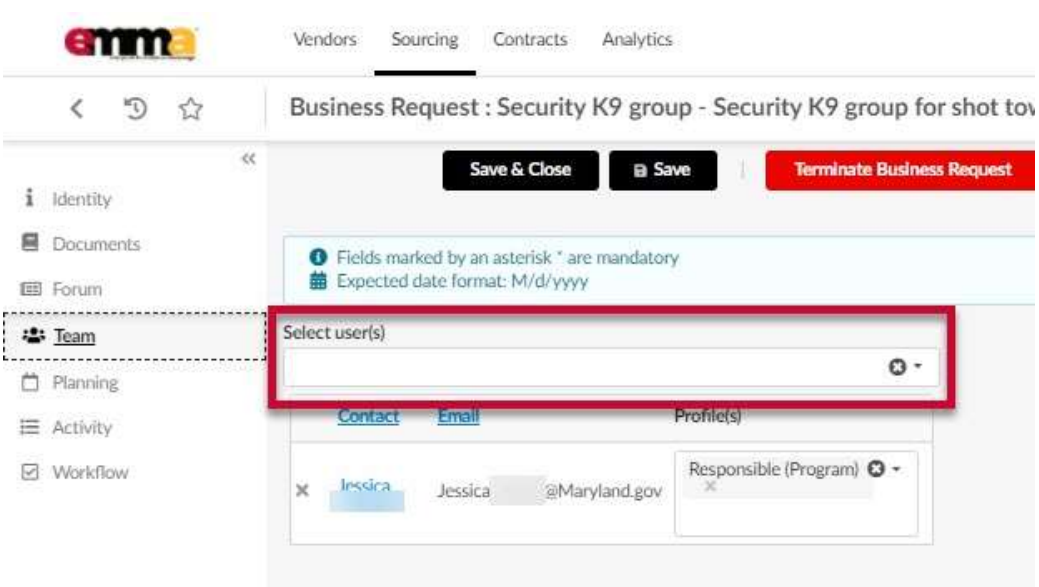


Figure 11: The Select user(s) field on the Team page.

    b. Select the Procurement Officer from the drop-down list that opens. The Procurement Officer populates in the team list with the default role **SME (Program)** (Subject Matter Expert) assigned.
        i. (Optional) If you want to remove yourself from the team at this point, you may. Click the **X** to the left of your name to remove yourself as a user.

   ii. If you remove yourself, skip Steps 16c and 16e.

c. Click the **x** to the right of the Responsible (Program) role.

d. Click the **x** to the right of the SME (Program) role.

e. Click the field to the right of your email address and select the **SME (Program)** role from the drop-down menu that opens.

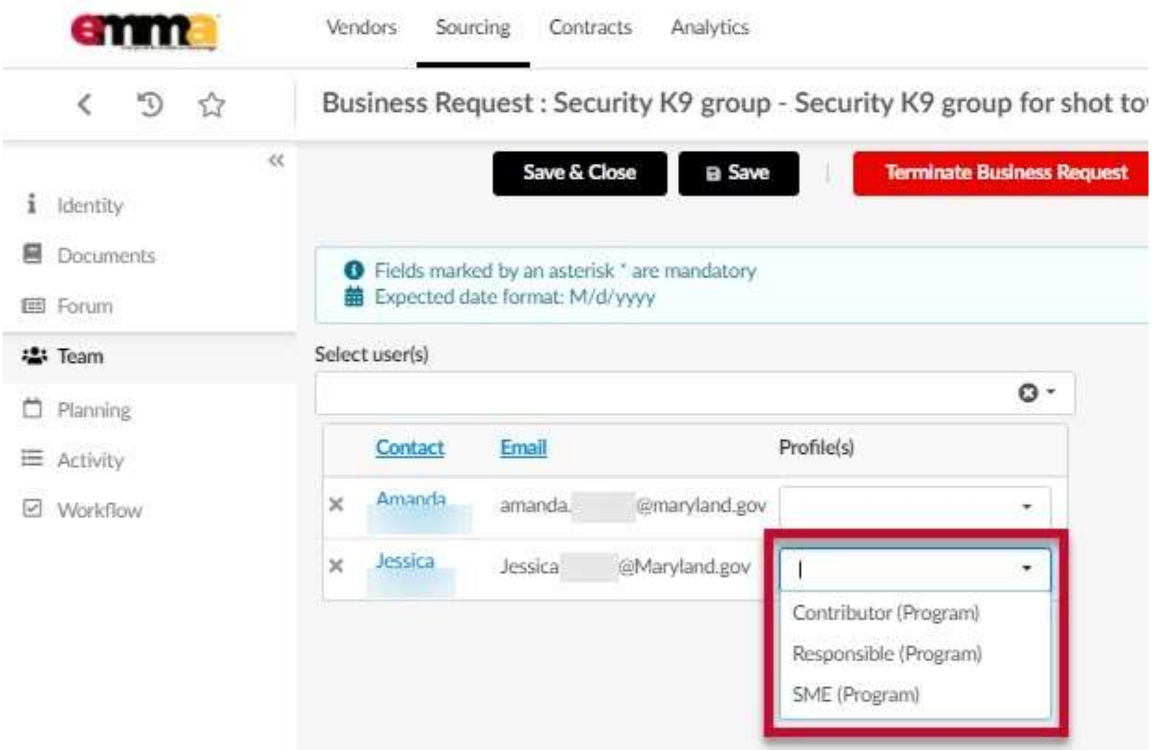


Figure 12: The field to the right of a user's email address on the Team page.

f. Click the field to the right of the Procurement Officer's email address and select the **Responsible (Program)** role from the drop-down menu that opens.

17. Click the **Save** button at the top of the Team page.
18. Click the **Workflow** tab on the left-hand side-panel.
19. Click the green **Hand off to Procurement Officer** button at the top of the Workflow page. A prompt opens. Click **OK**.

Figure 13: The Hand off to Procurement Officer button on the Workflow page.

20. Click the **Save & Close** button at the top of the Workflow page.

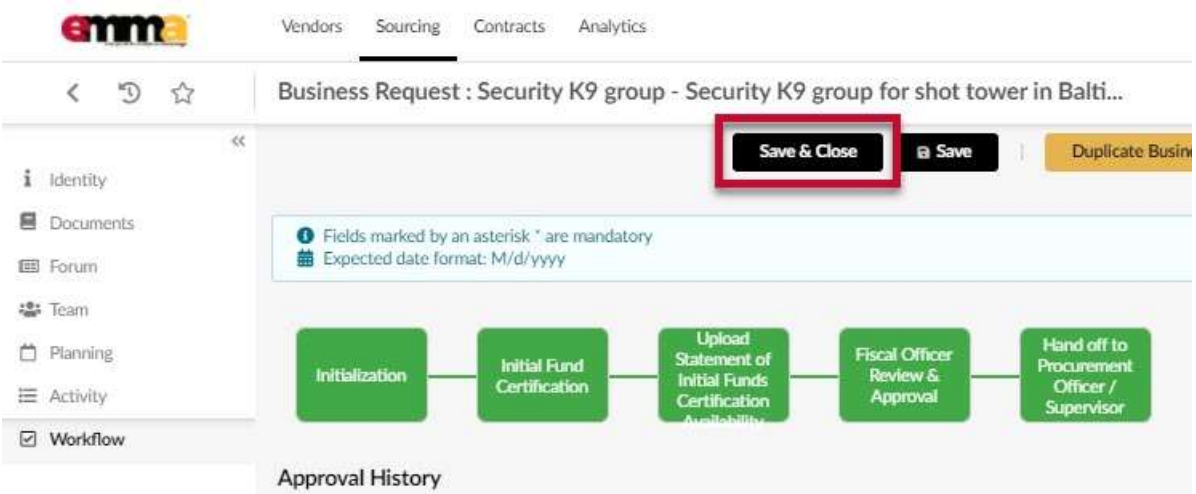


Figure 14: The Save & Close button on the Workflow page.

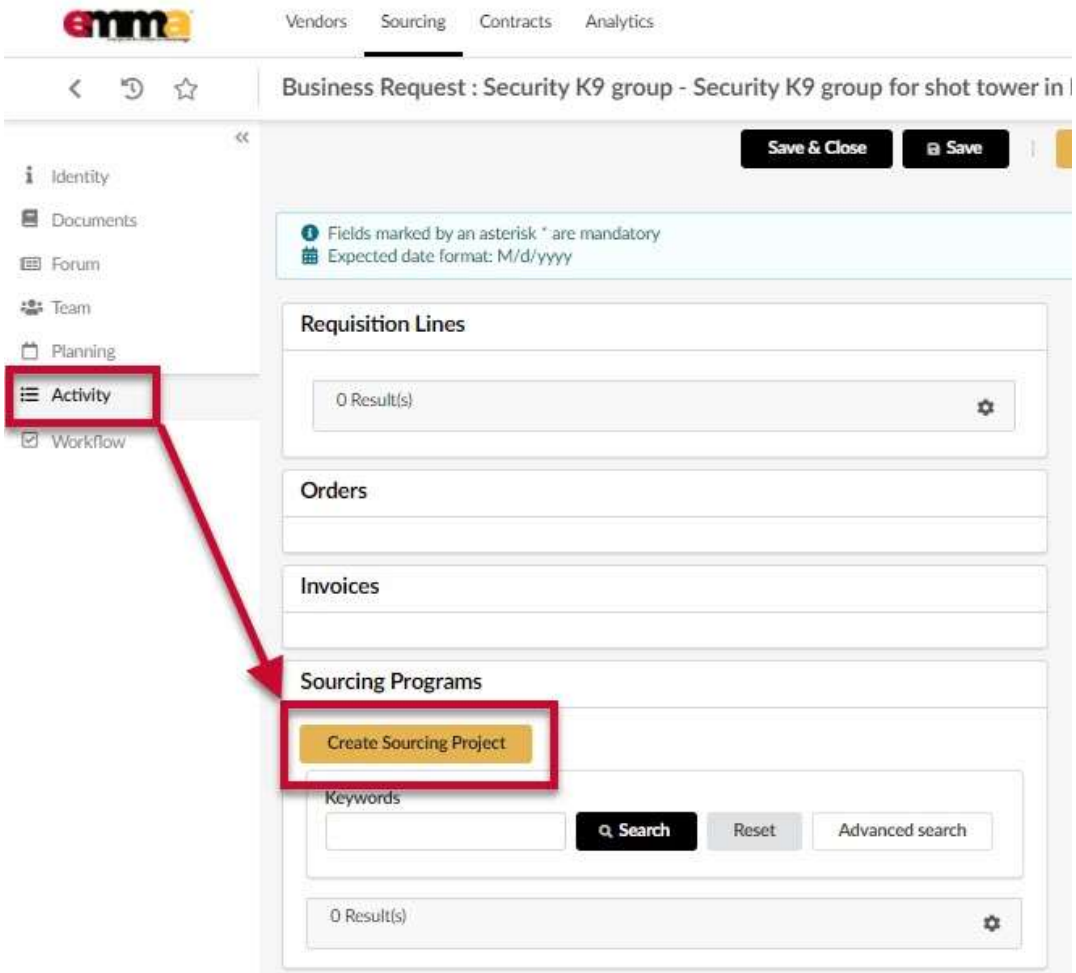
Next Steps

Start a Sourcing Project from an Existing Business Request

Follow these steps to create the Sourcing Project for your Business Request.

21. Navigate to your Business Request, if necessary. See Browse and Filter Business Requests in eMMA, below.

22. Click the **Activity** tab on the left-hand side-panel and click the **Create Sourcing Project** button.



23. Follow the normal processes for creating a Sourcing Project. See QRG…

Browse Business Requests in eMMA

This section shows how to access the Browse Business Requests page in eMMA. This page lets you search through existing Business Requests.

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 web page to open the drop-down menu and select the **Browse Business Requests** option. This shows a list of Sourcing Projects, both approved, and in progress.

Figure 15: The Sourcing tab and the Browse Business Requests option in the drop-down menu.

From here you can click the **Edit** (pencil) icon to the left of your business request to view and edit project specifications.

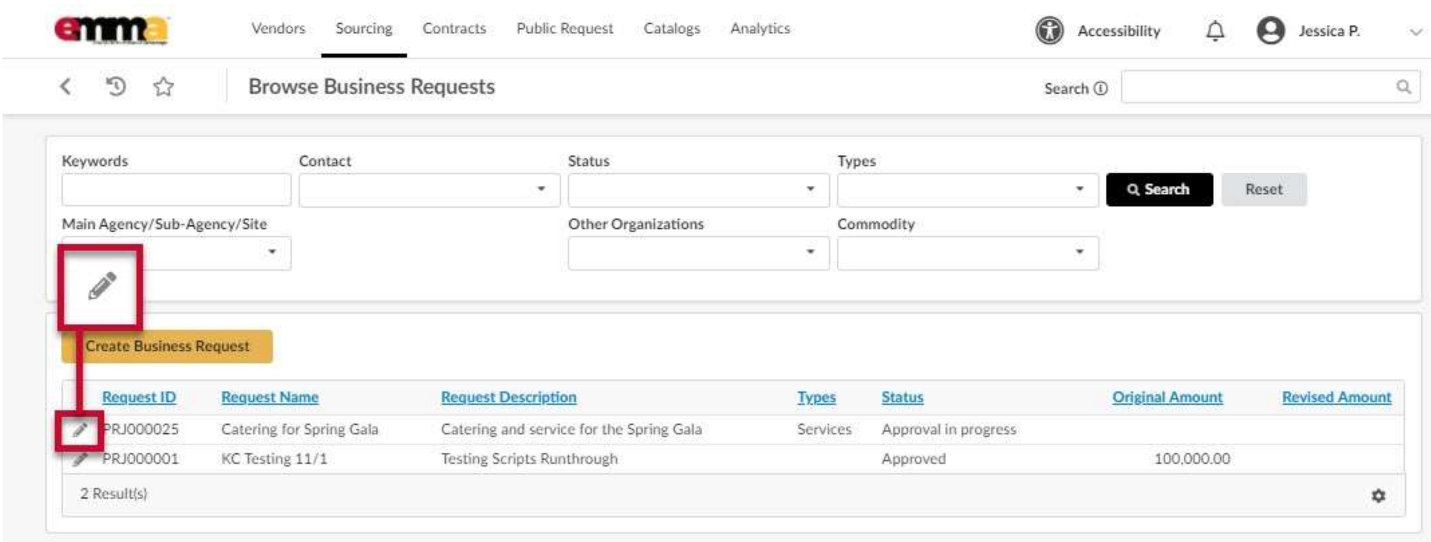


Figure 16: The edit (pencil) icon for a Business Request on the Browse Business Request page.

IMPORTANT: It is very important that you click the **Save** button after making any changes.

Filter Business Requests in eMMA

Once you're on the Browse Business Request page, you will see a list of Business Requests in eMMA, both approved and in progress. Some users may want to narrow the list to make it easier to find what they want. This section shows the different filters for this page and how they can help you quickly find what you're looking for. You can use one filter or a combination of several.

Browse Business Requests Using the Keyword Filter

The Keyword field displays Business Requests based on a keyword or term you enter.

1. Click the **Keyword** field and enter a term to narrow the list of Business Requests.

2. Click the **Search** button to display results.

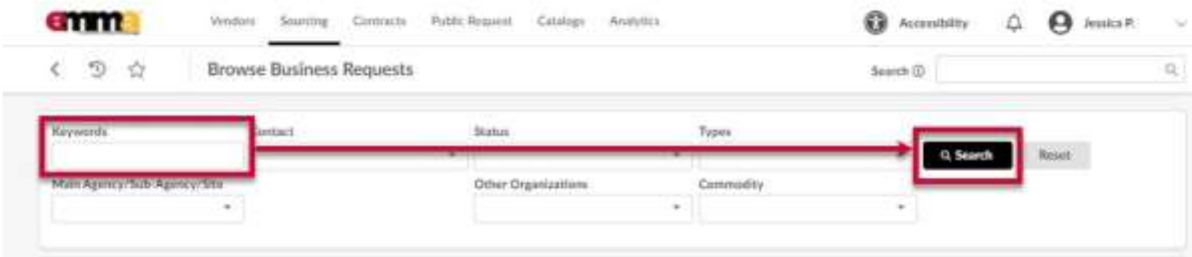


Figure 17: The Keywords field and the Search button for browsing Business Requests.

Browse Business Requests Using the Contact Filter

The Contact field lets you display business requests based on the contact responsible for those business requests.

1. Click the **Contact** field to open the drop-down menu and select a contact. If you know the contact, you can enter the name of the contact in the field or click **See All** at the bottom of the menu. A window opens and lists all contacts in eMMA. Select a contact from this list and close the window. The contact auto-populates in the Contact field.
2. Click the **Search** button to display results.

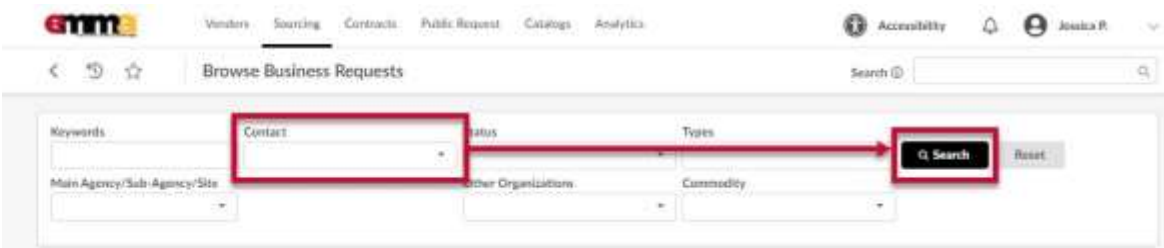


Figure 18: The Contact field and the Search button for browsing Business Requests.

Browse Business Requests Using the Status Filter

The Status field displays Business Requests by one of four options; **Approval in progress**, **Approved**, **Draft**, and **Terminated**.

1. Click the **Status** field to open the drop-down menu and select the option you wish to view.
2. Click the **Search** button to display results.

Figure 19: The Status field and the Search button for browsing Business Requests.

Browse Business Requests Using the Type Filter

The Type filter displays Business Requests by one of five options; **Corporate**, **Goods**, **New product introduction**, **Purchase**, **Services**.

1. Click the **Type** field to open the drop-down menu and select the option you wish to view.

2. Click the **Search** button to display results.

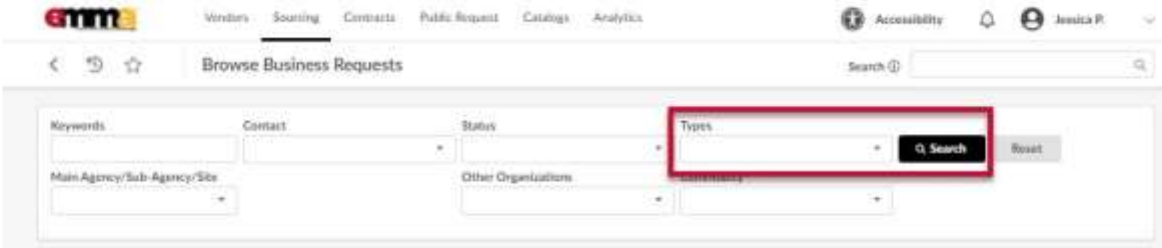


Figure 20: The Type field and Search button for browsing Business Requests.

Browse Business Requests Using the Main Agency/Sub-Agency/Site Filter

The Main Agency/Sub-Agency/Site filter displays Business Requests based on the main agency, sub-agency, or site associated with it.

1. Click the **Main Agency/Sub-Agency/Site** field to open the drop-down menu and select an agency. If you know the agency, you can enter the name of the agency in the field or click **See All** at the bottom of the menu. A window opens and lists all agencies in eMMA. Select an agency from this list and close the window. The agency auto-populates in the Main Agency/Sub-Agency/Site field.
2. Click the **Search** button to display results.

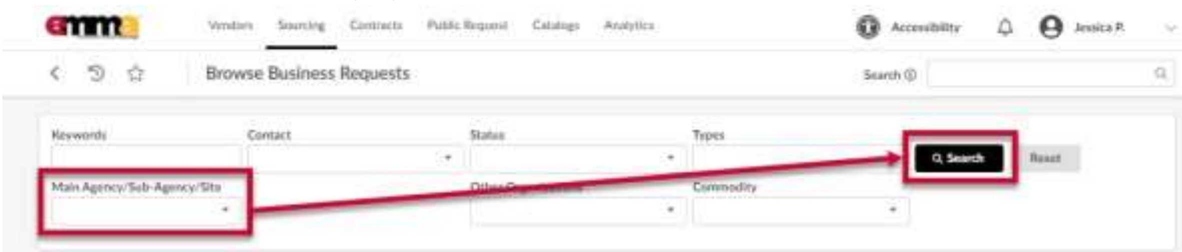


Figure 21: The Main Agency/Sub-Agency/Site field and Search button for browsing Business Requests.

Browse Business Requests Using the Other Organizations Filter

The Other Organizations field displays Business Requests by the Organization with which they are associated.

1. Click the **Other Organizations** field to open the drop-down menu. If you know the Organization, you can enter the name of the organization in the field or click **See All** at the bottom of the menu. A window opens and lists all the organizations in eMMA. Select an organization from this list and close the window. The organization auto-populates in the Other Organizations field.
2. Click the **Search** button to display results.

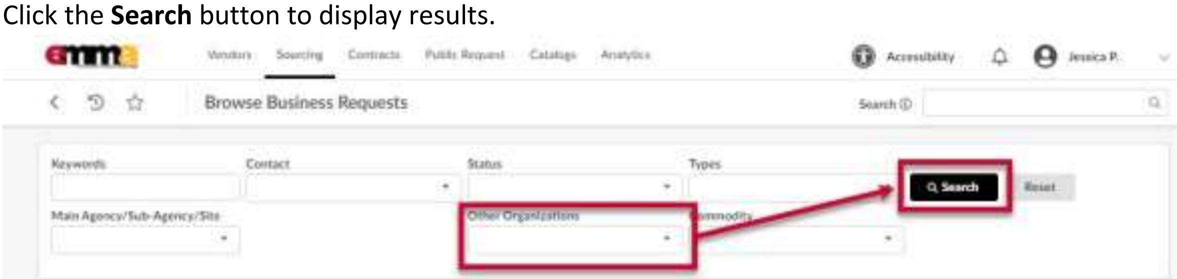


Figure 22: The Other Organizations field and Search button for browsing Business Requests.

Browse Business Request Using the Commodity Filter

The Commodity field displays Business Requests based on commodities associated with them.

1. Click the **Commodity** field to open the drop-down menu and select the option you wish to view. These commodities correspond to the UNSPSC codes. If you need help finding applicable UNSPSC codes, visit the UNSPSC website to search the entire list, https://www.unspsc.org/search-code.
   You can enter the name of the Commodity in the field or select **See All**. If you click See All, a window opens which lists all commodities. Select a commodity from this list and close the window. The commodity auto-populates in the Commodity field.
2. Click the **Search** button to display results.

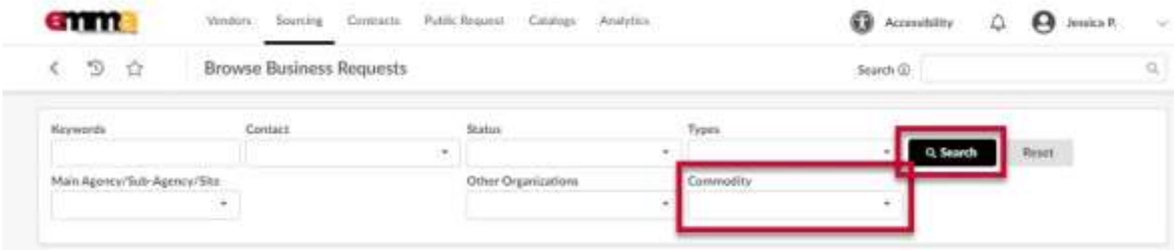


Figure 23: The Commodity field and Search button for browsing Business Requests.