Add a Document to a Sourcing Project in eMMA
Quick Reference Guide

Overview

This Quick Reference Guide (QRG) is intended for Procurement Officers and Buyers who want to add documents to their sourcing projects in eMaryland Marketplace Advantage (eMMA). It shows how to add a document draft to a sourcing project and publish it so others can view it. It also includes training videos and instructions so you can choose the best method from which to learn.

NOTE: You can only add documents to sourcing projects that you are responsible for, and only your sourcing project Team members can view them. Vendors can view your documents if you grant them permission. Documents stored here can be copied to the solicitation and shared with Vendors, if desired.

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

Instructional Video

https://youtu.be/cXUSLcYnSIA

Step-by-Step Instructions

Add a Document to a Sourcing Project

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: You cannot upload documents over 300,000 KB in size.

NOTE: You cannot directly edit documents in eMMA, but you can upload new versions.

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 **Browse Sourcing Projects** from the drop-down menu that opens. A list of sourcing projects displays.
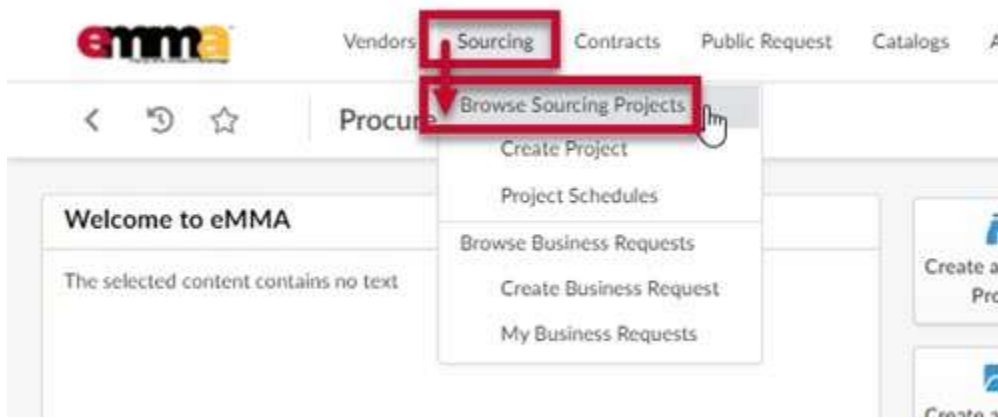
Figure 1: The Sourcing tab and Browse Sourcing Projects in the drop-down menu.

3. Use the Search fields and filters to find the solicitation and click the Edit (pencil) icon to the left to view the project.

    NOTE: You can only add documents to sourcing projects to which you belong.

Figure 2: The Edit (pencil) icon for a Sourcing Project.

4. 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.

5. Click the **Create Document** button in the **Sourcing Project Documents** pane. The Sourcing Project Documents pop-up window displays.
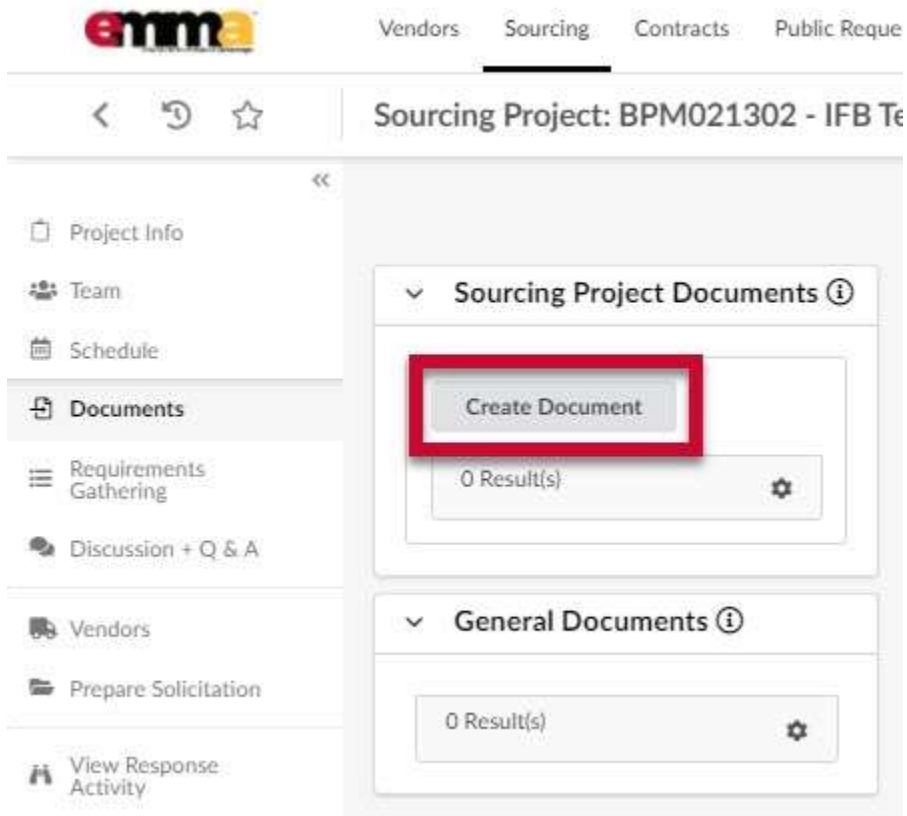

Figure 3: The Create Document button in the Sourcing Project Documents pane of the Documents tab.

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

Figure 4: 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.

7. You have four options to move forward:

Figure 5: 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 7c).

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.

8. 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.

9. Click the **Save** button at the top of the Documents page.

Your document displays on the Documents page along with a current version, who created the document, the creation date, and the date last modified. Remember to click the **Save** button after making any updates or changes to your document.

Click the Edit (pencil) icon to the left of the document Title to edit the document (upload a new version).

Click the Delete (trashcan) icon to the left of the document Title to delete the document.
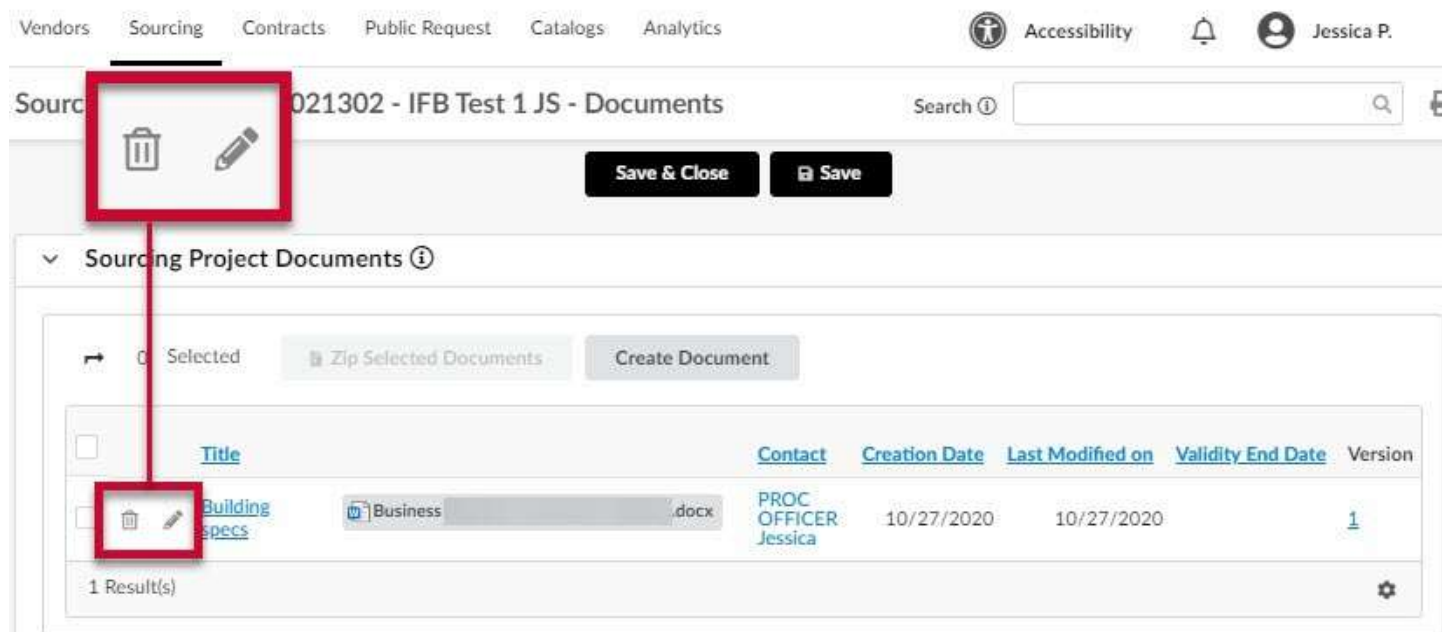

Figure 6: The added document for a sourcing project and a magnified view of the Delete and Edit icons.

Next Steps

 While required steps after this may vary depending on your project, the next process would be to add Vendors to your project. See the Buyer QRG Add Vendors to Your Sourcing Project.