



Create a Schedule for a Sourcing Project in eMMA

Quick Reference Guide

Overview

This Quick Reference Guide (QRG) is intended for Buyers who want to create a schedule for a sourcing project in the eMaryland Marketplace Advantage (eMMA). It shows how to create a schedule for an Invitation for Bid (IFB) sourcing project and walks through creating a task for your schedule. It also includes training videos and written instructions so you can choose the best method from which to learn.

NOTE: You can only create and edit schedules for a sourcing project for which you are responsible.

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

There are two sections to this QRG:

- Create a Schedule for a Sourcing Project
- Create a New Task

Instructional Video

<placeholder>

Step-by-Step Instructions

Create a Schedule for 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: 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 **Browse Sourcing Projects** from the drop-down menu that opens. Search fields display above a list of sourcing projects of which you are a member.

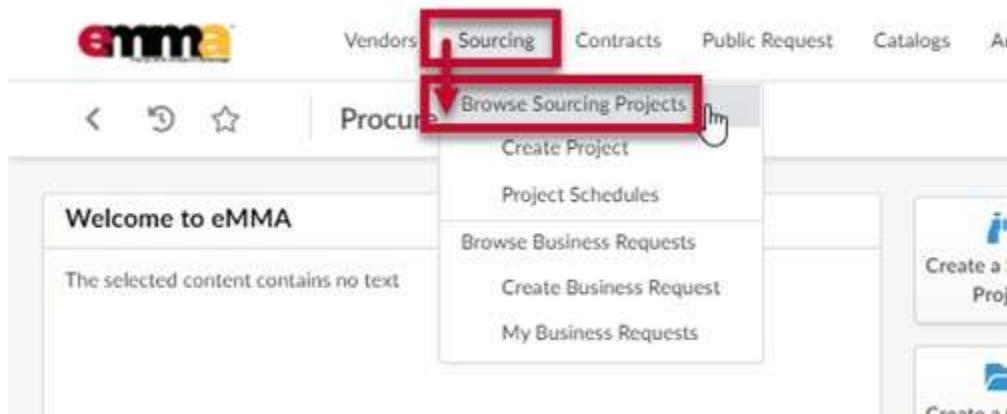


Figure 1: The Sourcing tab and Browse Sourcing Projects in the drop-down menu.

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 create a schedule for a sourcing project you own.

A screenshot of a table showing a list of sourcing projects. The table has columns for 'ID', 'Project', and 'Type'. The 'Edit' icon (a pencil icon) is highlighted with a red box for the first project in the list. The data in the table is as follows:

ID	Project	Type
PM021302	IFB Test 1 JS	IFB: Invitation to Bid (LP)
BPM021301	MMIS II IV&V Masters (created 10/22/20)	Secondary Competition
BPM021299	Juniper MITDP VoIP Upgrades	Secondary

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

4. Click the **Schedule** tab in the left-hand side-panel to display the Schedule page. A list of tasks displays in order of progression depending on your type sourcing project.

NOTE: If you do not see the Schedule tab, your sourcing project type may not require a schedule.

NOTE: The IFB schedule populates with predetermined tasks. For Requests for Proposals (RFPs) Double and Triple Envelope, you will need to create your own schedule tasks due to the complexity of RFP development and issuance.

emm

Vendors Sourcing Contracts Public Request Catalogs Analytics

Accessibility Jessica P.

Sourcing Project: BPM021302 - IFB Test 1 JS - Schedule

Save & Close Save

Project Info

Team

Schedule

Documents

Requirements Gathering

Discussion + Q & A

Vendors

Prepare Solicitation

View Response Activity

Analyze & Award Rec.

Workflow

Expected date format: M/d/yyyy

Task List & Timing ①

Add a Task

Order	Type	Label	Assigned to	Initial Start Date	Initial End Date	Status	Progress
1	Action	Initial Planning Meeting	Jessica PROC OFFICER			Scheduled	%
2	Action	Specification Drafting	Jessica PROC OFFICER			Scheduled	%
3	Action	Agency Approvals	Jessica PROC OFFICER			Scheduled	%
4	Action	Control Agency Announcements	Jessica PROC OFFICER			Scheduled	%

Figure 3: The Schedule tab and task list for an IFB project

5. (Optional) Click the Edit (pencil) icon to the left of a task you want to change.
6. (Optional) Click the Delete (trashcan) icon to the left of a task you want to delete.
7. Enter the project start date in the **Initial Start Date** field to the right of the first task. Once you enter that date, the remaining task dates auto-populate. Click the date fields to the right of the task to adjust start and end dates. Scroll down to the bottom and see your schedule depicted in a Gantt chart. Hover your cursor over a

point on the chart to see a pop-up with more details about it.



Figure 4: The Gantt chart for a created schedule on the Schedule page.

8. Click the **Save** button at the top of the page when you're finished.

Create a New Task

This process continues from the Schedule page in the process above and shows how to create a task in your schedule.

1. Click the **Add a Task** button above the task list to create a new task. The Edit Task window opens. You may need to scroll horizontally to see all the sections.

2. Enter information in the fields of the **Information** section. A red asterisk (*) indicates a required field.

Edit task

Save Save & Close Save

Information	
Task Label *	a
Type *	b
Task Code ⓘ *	c
Description	d
Manager *	f PROC OFFICER Jessica
Estimated Workload ⓘ	i
Parent Task	k
Previous Task	m
Type *	Action
Assigned to	g
Status	e Scheduled
Progress	h %
Sourcing Steps	j l

Figure 5: The fields for the Information section.

- Task Label (*)**: Enter a label for your new task in this field.
- Type (*)**: Click this field to select a type for this task;
 - Action (the default type)
 - E-Mail Sent
 - Event/Workshop
 - Mail Sent
 - Phase
 - Phone Contact
 - Meeting
- Task Code (*)**: This field lets you select the order sequence for a single task. Click this field and enter the letter “T” and a number for the row in which you want the task to appear. For example, you want the Specification Drafting task to be the 5th task on the list. You would enter “T5” in this field.
- Description**: Enter a brief description for the task.
- Status**: Click this field to select a status for this task;
 - Scheduled (the default status)
 - Not Started
 - In progress
 - Complete
 - Close
- Manager (*)**: This field auto-populates with your information. Click this field to open a drop-down menu and change it to another member of your team.
- Assigned to**: Click this field to open a drop-down menu and select a member of your team you want to assign this task to.

- h. **Progress:** Enter a numerical value to update the schedule as to how much of this task is complete.
- i. **Estimated Workload:** Enter the number of workdays you estimate to complete this task.
- j. **Updated/Actual Workload:** Enter the actual number of workdays it took to complete this task.
- k. **Parent Task:** Click this field to open a drop-down menu and select a parent task for this task.
- l. **Sourcing Steps:** Click this field to open a drop-down menu and select an option from the menu.
 - i. Reverse Auction
- m. **Previous Task:** (Optional) Enter the last task to take place before your task.

3. Enter information in the fields for both the **Dates Management** and **Comments** sections. A red asterisk (*) indicates a required field.

Dates Management

Initial	Begin date Initial Start Date*	End date Initial End Date*	Duration (days) Duration
Updated	Revised Start Date	Updated End Date	Revised Duration
Actual	Actual Start Date	Actual End Date	Duration

Comments

Comment

300,000 kb limit.

Save

Click or Drag to add files

Figure 6: The Dates Management and Comments section for a task.

- a. **Initial Dates (*):** Click the **Initial Start Date (*)** field and select a date on which to start your task. Click the **Initial End Date (*)** field to select an end date. Enter a **Duration** (optional) period (in days) if desired.
- b. **Comment:** (Optional) Enter comments in this field for your task.
- c. **Click or Drag to add files:** (Optional) Click the **Click or Drag to add files** button to add a file from your device or drag a file to this button to add it.

NOTE: Added uploaded files cannot exceed 300,000 KB.

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

4. You have three options from this point:

Edit task



Figure 7: The Save, Save & Close, and Save & Add New buttons in the Edit task window.

- a. Click the **Save** button to save the task and remain in the Edit task window.
- b. Click the **Save & Close** button to save the task and close the Edit task window.
- c. Click the **Save & Add New** button at the top of the Edit task window to save the task and add another new task.

5. Click the **Save** button at the top of the Schedule page to save your schedule.

Next Steps