Prepare Your Sourcing Project Solicitation in eMMA

Quick Reference Guide

Overview

This Quick Reference Guide (QRG) is intended for Procurement Officers/Buyers who need to prepare a solicitation for advertisement in eMaryland Marketplace Advantage (eMMA). It shows how to prepare a solicitation for an Invitation for Bid (IFB) with variations for a Request for Proposal (RFP) 2nd envelope and RFP 3rd envelope.

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

This QRG discusses this process into 3 sections:

- Prepare Your Solicitation in eMMA
- Pricing
- Attachments

Prerequisites

This QRG assumes you have completed the steps for creating a Sourcing Project and adding Vendors to an established sourcing project in eMMA. If not, please see the QRGs called, "Creating a Sourcing Project in eMMA" and "Add Vendors to a Sourcing Project in eMMA."

Instructional Video

https://youtu.be/MLnrzaPtNQU

Step-by-Step Instructions

Prepare Your Solicitation 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 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 **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.

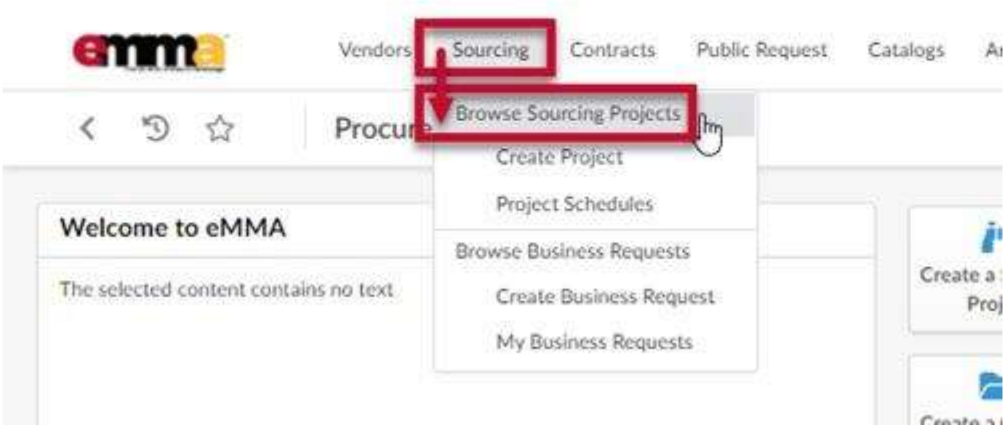


Figure 1: The Sourcing drop-down menu and the Browse Sourcing Projects option in eMMA.

3. Use the search fields and filters to find the sourcing project to which you need to award vendors in the list displayed and click the **Edit** (pencil) icon to the left to view the project. You can also click the hyperlinks for the project or ID as well.

Figure 2: The Edit (pencil) icon to the left of a sourcing project.

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

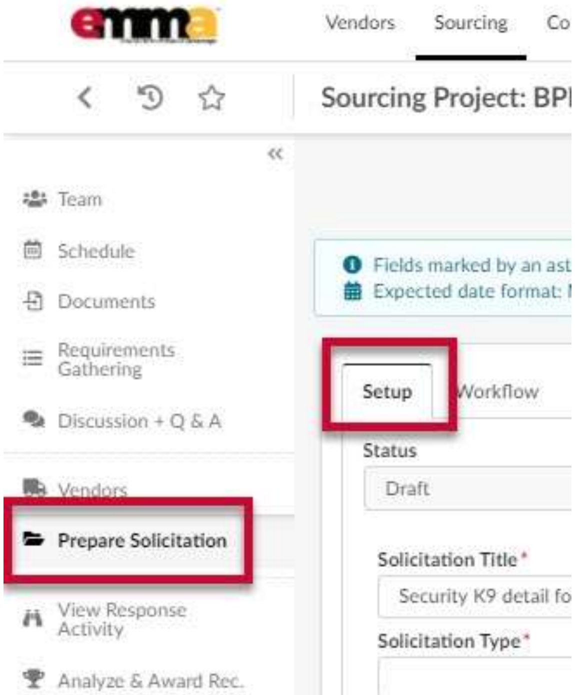


Figure 3: The Setup subtab on the Prepare Solicitation page.

5. 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.

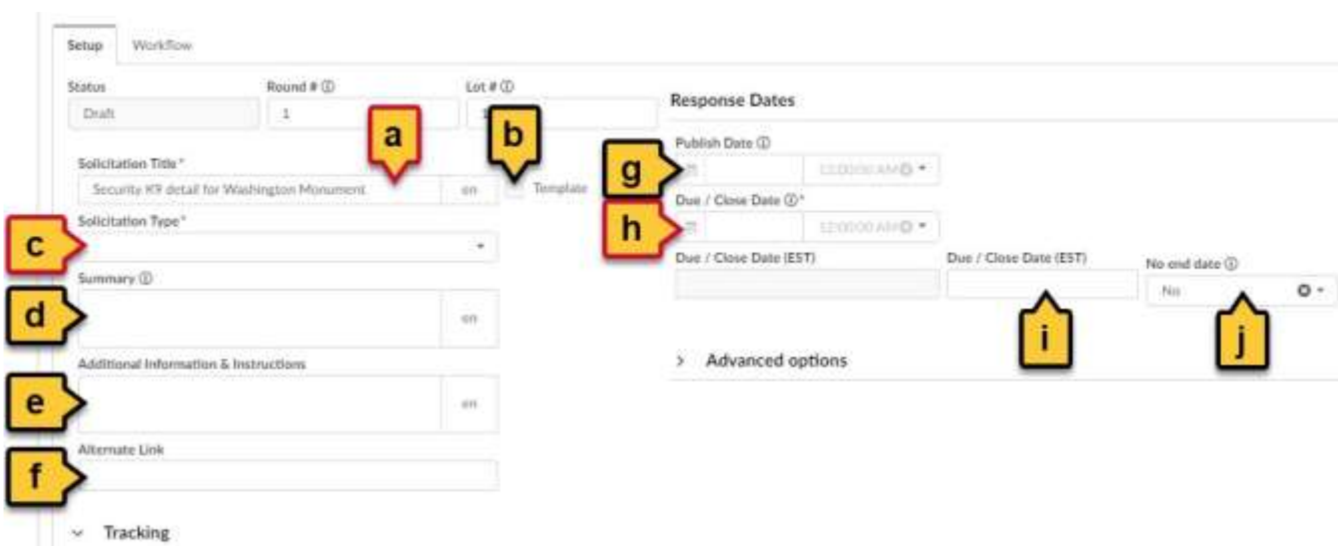


Figure 4: The form fields in the Setup subtab for a sourcing project.

   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. **Solicitation Type (*):** Click this field to open a drop-down menu. Click the **See All** option from the menu. A new window opens that lists all solicitation types. The solicitation types are pre-determined by the Sourcing Project type selected when the Sourcing Project was created. If you do not see the type of Solicitation that you wish to advertise here, you will need to go back to the Sourcing Project tab and change it there. Please note that, if you do this, a lot of the work you've done since may be erased.

d. **Summary:** Enter a summary for your solicitation.

   NOTE: Vendors can view this summary.

e. **Additional Information & Instructions:** Enter any further need-to-know information or instructions for Vendors.

f. **Alternate Link:** Enter the link to the bid board on which this solicitation is posted, if applicable; i.e. BidExpress.

g. **Publish Date:** **IMPORTANT!!** If you want vendors to start submitting a response immediately, leave this field BLANK. Select a date only if you want vendors to start submitting responses at a future date.
   i. If you select a date for this field, make sure you check the **Auto opening** checkbox (displays to the right of these fields after you click the Save button in Step 6).

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.

6. Click the **Save** button at the top of the Prepare Solicitation page.
7. Additional checkboxes and fields display depending on your selected project type.

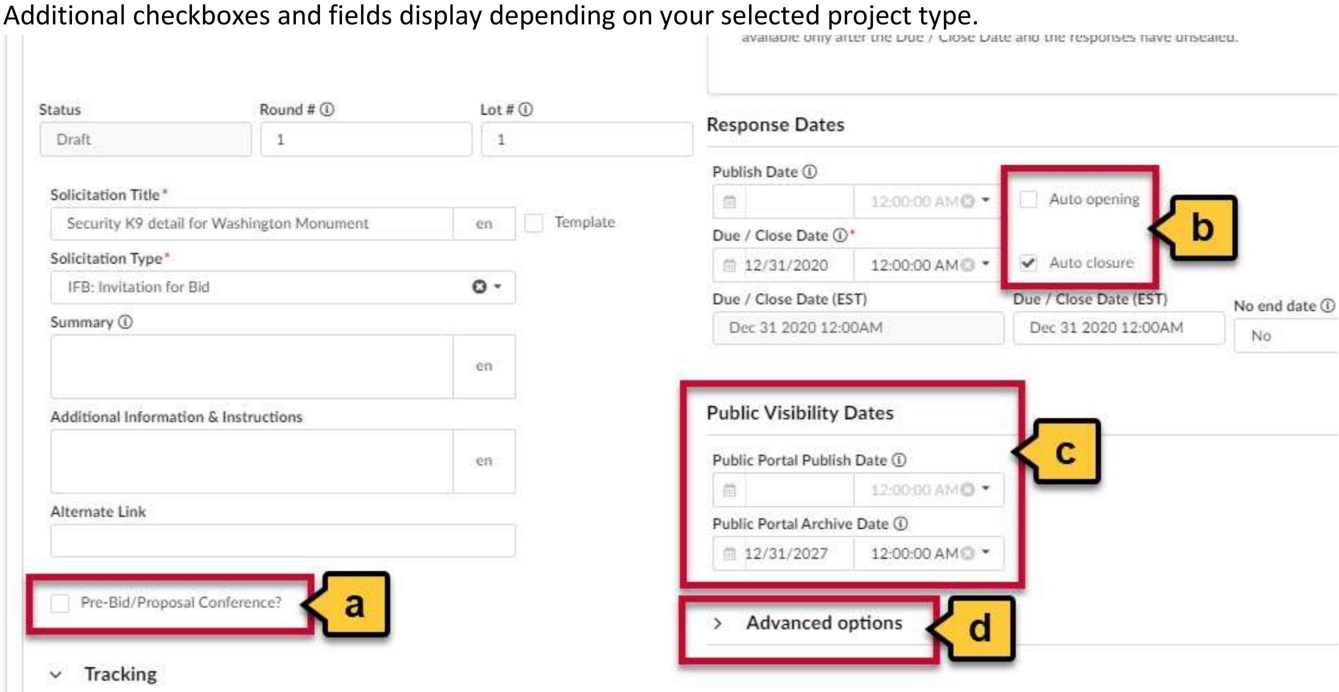


Figure 5: The additional fields that display depending on your selections.

a. **Pre-Bid/Proposal Conference:** 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.

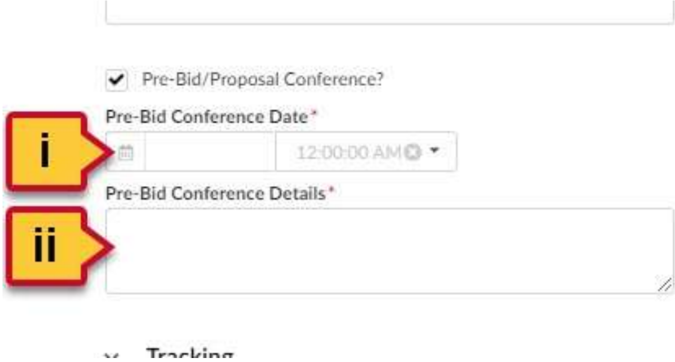


Figure 6: The additional Pre-Bid/Proposal fields.

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.

b. **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.

c. 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.

d. **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**, **Sealed Responses**, **Vendors must Acknowledge & Identify intent to Respond**, and **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.

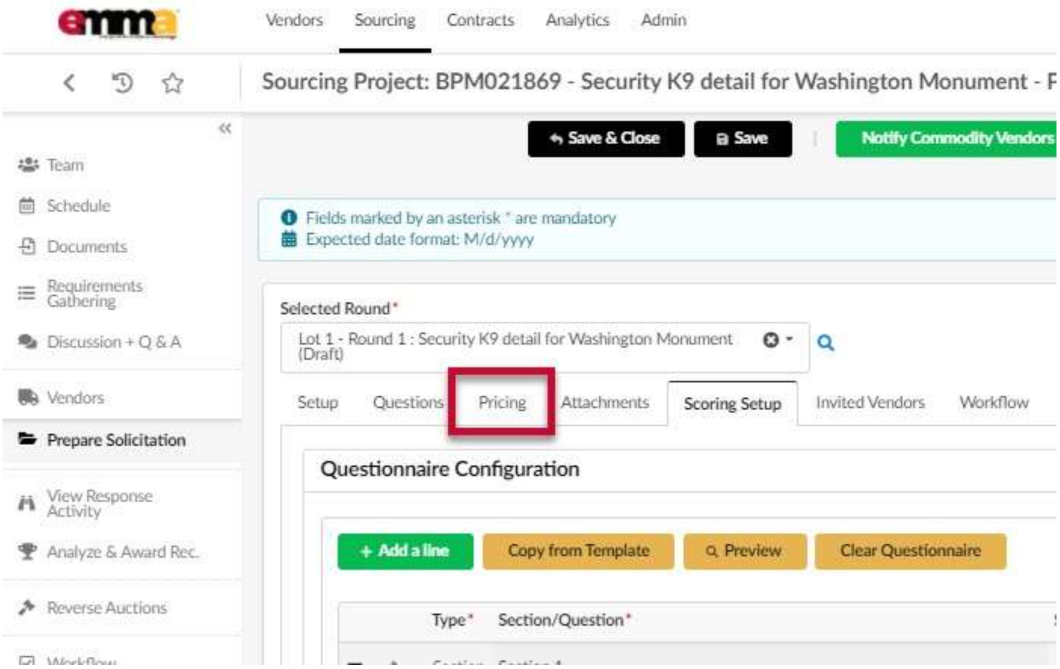
Figure 7: The Advanced options for setting up an IFB sourcing project.

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

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.

9. Click the Pricing subtab on the Prepare Solicitation page.



10. 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.

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.

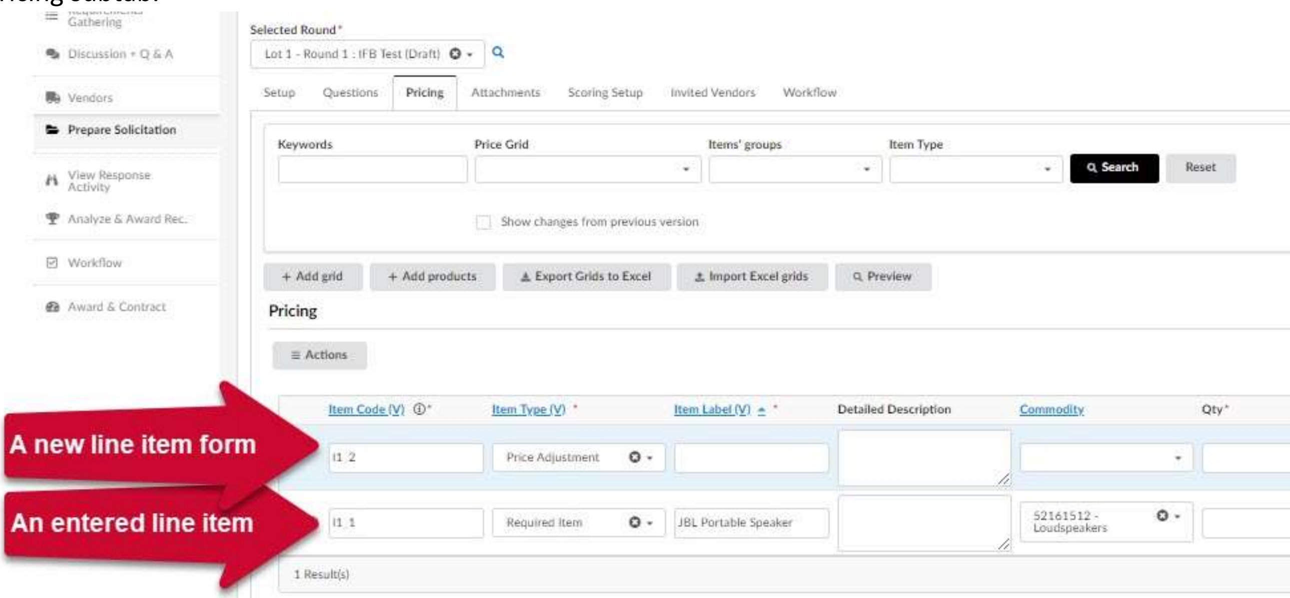
g. **UoM (*):** Click this field to open the drop-down menu and select a unit of measure for your item. (Optional) Click the **See All** option at the bottom of the menu to select from a more detailed list.

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.

11. 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.

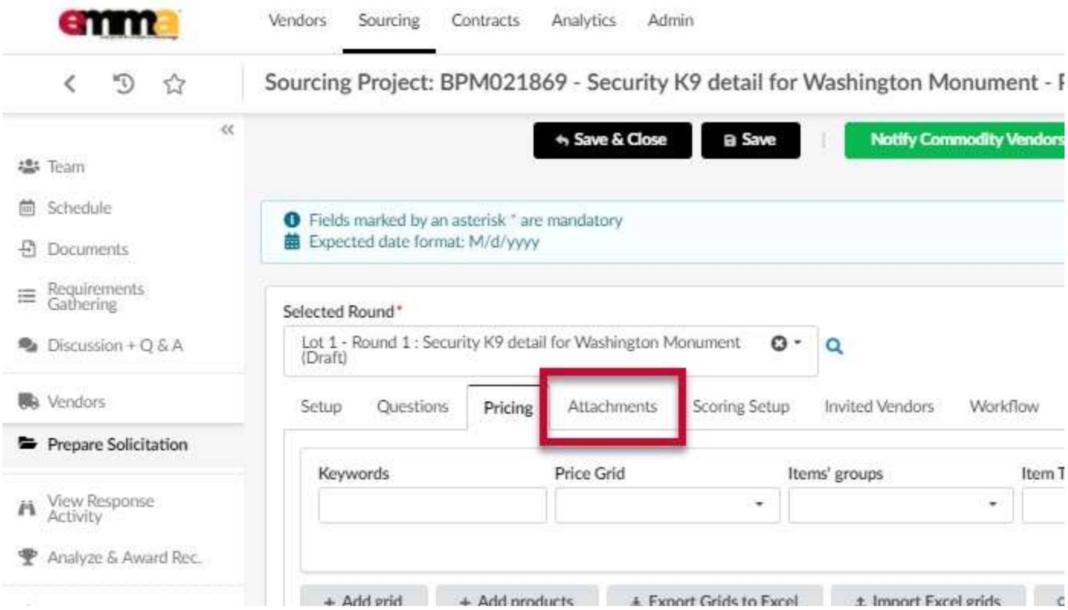


12. (Optional) Repeat Steps 10 and 11 to add new items, if necessary.

Attachments

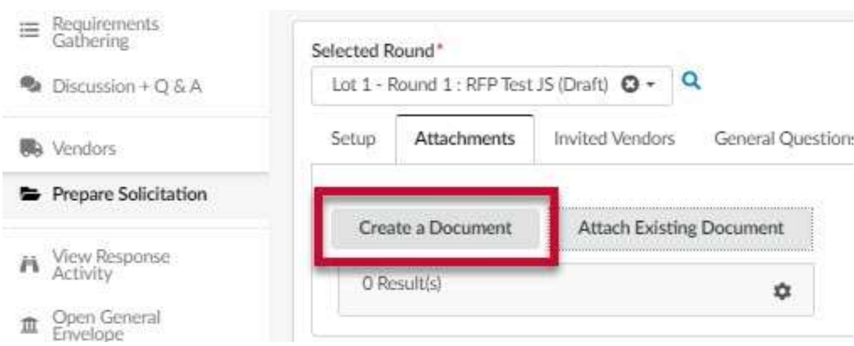
This section uses the Attachments subtab to show how to add documents to your public solicitation. This process continues from the last step in the previous process.

13. Click the **Attachments** tab on the Prepare Solicitation page.

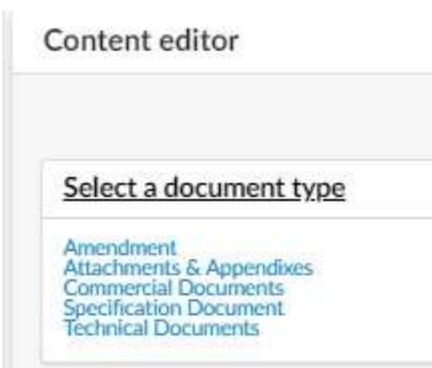


14. (Optional) Click the **Create a Document** button to add a new document to your solicitation.

NOTE: Uploaded documents cannot exceed 300,000 KB.



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

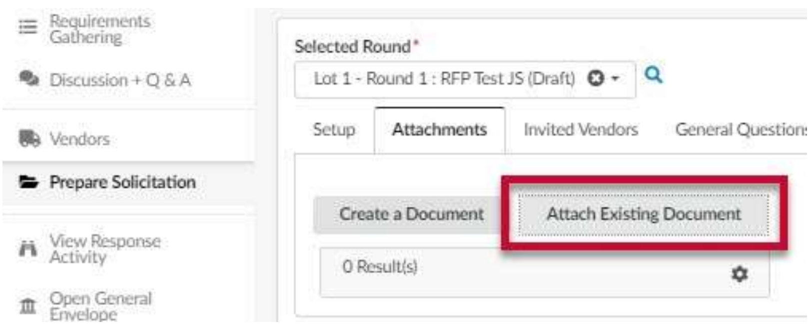


b. Enter information in the document window fields and add the document (**Click or Drag to add files** button).

NOTE: Make sure you change the document status to **Approved** so that both team members and vendors can view it.

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

15. (Optional) Click the **Attach Existing Document** button to add a document that exists in the Documents tab of your project. The Sourcing Project/Documents window opens and lists any documents you added to the Documents tab.



16. 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.

Next Steps

Notify Vendors of your Solicitation. See the QRG Notify Vendors of Your Solicitation in eMMA.