



Scan and Add a Document to a Sourcing Project in eMMA

Quick Reference Guide

Overview

This Quick Reference Guide (QRG) is intended for users who want to scan and upload documents to their sourcing projects in eMaryland Marketplace Advantage (eMMA). It gives guidance on scanning documents with a variety of methods and shows how to add a document draft to a sourcing project and publish it so others can view it. It also includes a training video 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.

Scanning Documents

eMMA cannot accept paper documents as part of the procurement process. Paper documents must be scanned and uploaded to sourcing projects in eMMA. There are many ways to scan a document on many devices and different operating systems. Due to that variation this section lists the three most common ways to scan documents from a smart device, home office, or in-office scanners in Maryland State office buildings.

Scanning on a smartphone or tablet

If you have a smart phone or tablet, you can

1. Download a scanning application from the AppStore or from Google Play Store.
2. Scan the document on your smart phone or tablet and email it to yourself.
3. Open the email and save the document to your computer.
4. From your computer, access eMMA and follow the directions to add a document to eMMA listed below.

Scanning at home

If you own a scanner and work from home,

1. Scan the document. Search YouTube for a demonstration of your specific scanner, if needed.
2. Save it to your computer.
3. Access eMMA and follow the directions to add a document to eMMA listed below.

Maryland State In-Office Scanners

If you are working from a Maryland State Office building, you can use one of the office scanners to email a document to yourself. If you need assistance, email the DoIT Service Desk at Service.Desk@maryland.gov .

1. Scan the document on the in-office scanner and email it to yourself.
2. Open the email and save the document to your computer.

3. Access eMMA and follow the directions to add a document to eMMA listed below.

Instructional Video

For the step-by-step instructional video for adding a document to a sourcing project, click the link <https://youtu.be/cXUSLcYnSIA> .

For more Maryland procurement related videos check out our Maryland Department of General Services YouTube Playlists at <https://www.youtube.com/channel/UCwZjGfxwkiW1RSTIF69SBLg/playlists> .

Live training sessions for eMMA can now be found at the Maryland Department of General Services YouTube Channel at <https://www.youtube.com/channel/UCwZjGfxwkiW1RSTIF69SBLg/featured> .

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.

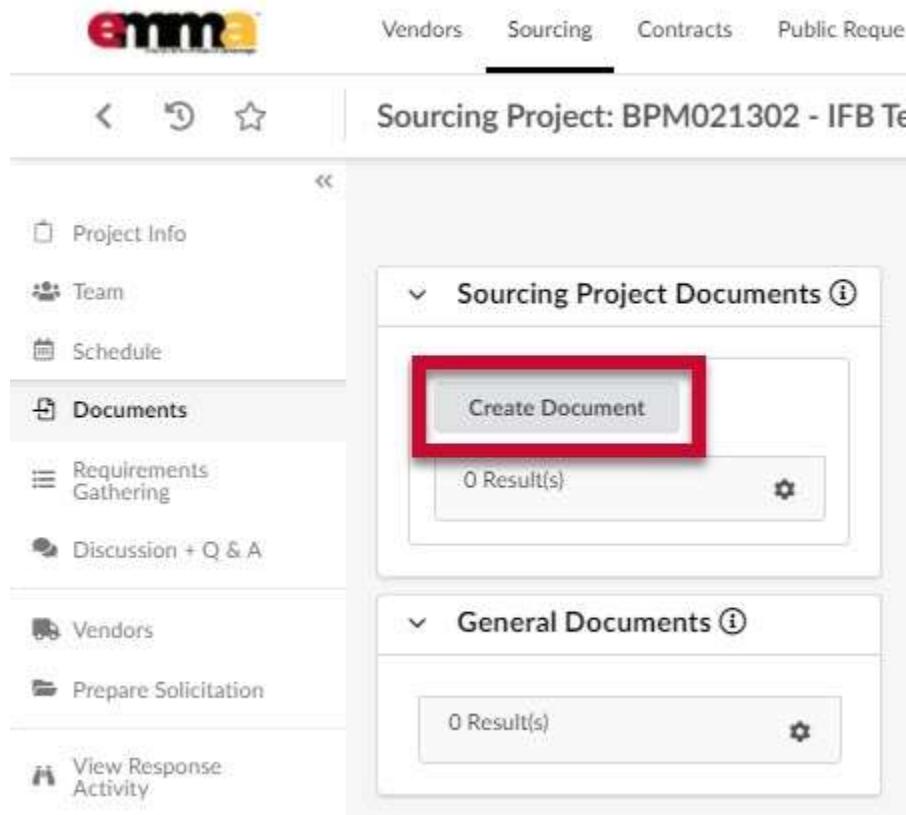
NOTE: You can only add documents to sourcing projects to which you belong.



ID	Project	Type
 BPM021302	IFB Test 1 JS	IFB: Invita Bid (LP)
 BPM021301	MMIS II IV&V Masters (created 10/22/20)	Secondary Competiti
 BPM021299	Juniper MITDP VoIP Upgrades	Secondary

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.



The screenshot shows the 'Documents' tab selected in the left sidebar. The main area displays the 'Sourcing Project: BPM021302 - IFB Te' pane. On the left, a sidebar lists project components: Project Info, Team, Schedule, **Documents** (which is selected and highlighted in grey), Requirements Gathering, Discussion + Q & A, Vendors, Prepare Solicitation, and View Response Activity. The 'Documents' section of the main pane is titled 'Sourcing Project Documents' and contains a 'Create Document' button, which is highlighted with a red box. Below it, it says '0 Result(s)' and has a settings gear icon. The 'General Documents' section below it also says '0 Result(s)' and has a settings gear icon.

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.

The screenshot shows the 'Sourcing Project Documents' window. At the top, there are three buttons: 'Save as draft' (black), 'Save & Close' (black), and 'Publish' (yellow). A message box at the top left says: 'A Draft document is not visible to other users. Changing the status to Approved makes it visible to others.' Below this, there are two main sections: 'Information' and 'Sourcing Project'. The 'Information' section contains fields for 'Title', 'Version', 'Status', 'Document', 'Language', and a file upload area. The 'Sourcing Project' section shows a list of projects. Yellow callout arrows labeled 'a' through 'f' point to specific fields and areas: 'a' points to the 'Title' field, 'b' points to the 'Version' field, 'c' points to the 'Summary' field, 'd' points to the 'Status' field, 'e' points to the 'Click or Drag to add files' button, and 'f' points to the 'Sourcing Project' list.

Figure 4: The Sourcing Project Documents window.

- Title (*)**: Enter a title for the document.
- Version (*)**: Enter a numeric value for the version of the document. The application will suggest the next version increment for each new revision.
- Summary**: Enter a brief summary of the document. Once you click this field, text editing options appear above it.
- Status**: This field shows the status of your document. No action is needed here.
- 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.
- 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:

The screenshot shows the 'Sourcing Project Documents' window with a different set of buttons at the top: 'Save as draft' (black), 'Save & Close' (black), 'Publish' (yellow), and 'Delete' (yellow). Below this, the 'Information' section is visible, showing the 'Status' field. Yellow callout arrows labeled 'a' through 'd' point to these buttons: 'a' points to 'Save as draft', 'b' points to 'Save & Close', 'c' points to 'Publish', and 'd' points to 'Delete'.

Figure 5: The Save and publish options for a document in Draft state.

- 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.

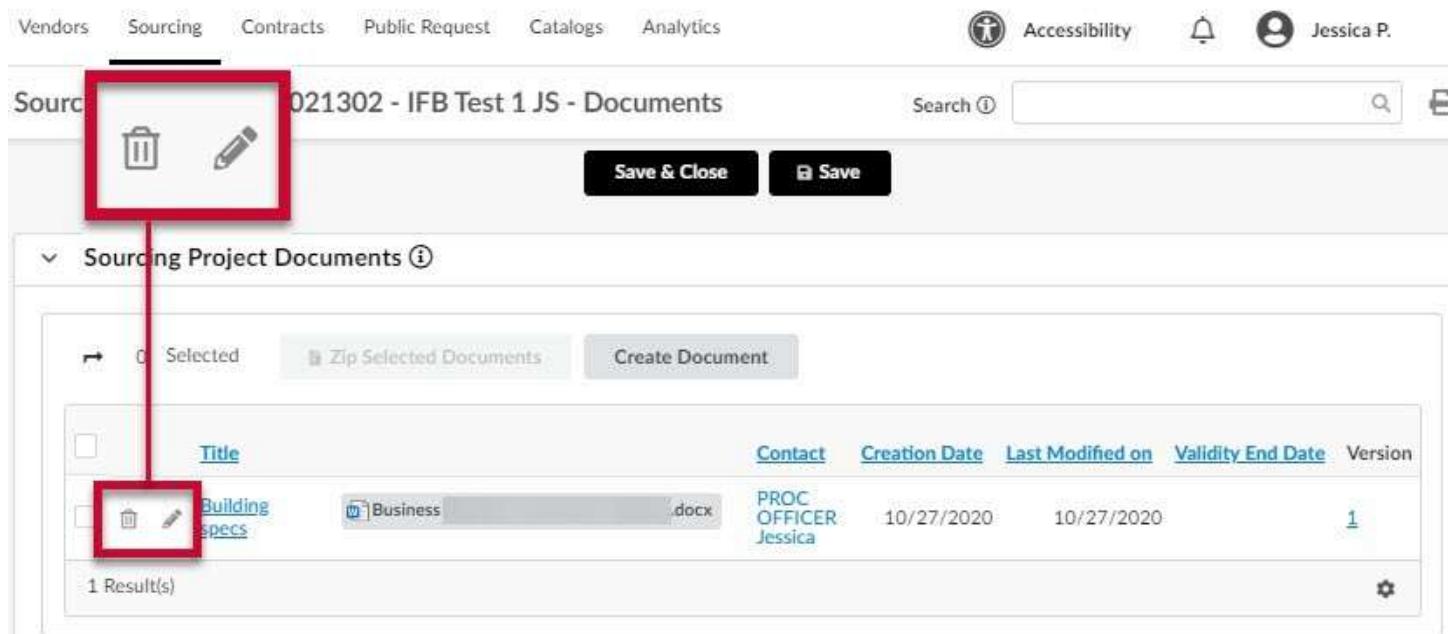
8. Unless you chose option b (Save & Close) or d (Delete) in the previous step, click the **Save & Close** button at the top of the window.

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.



The screenshot shows the 'Sourcing Project Documents' page. At the top, there are navigation links: Vendors, Sourcing, Contracts, Public Request, Catalogs, and Analytics. On the right, there are icons for Accessibility, a bell, and a user profile for 'Jessica P.'. The main title is '021302 - IFB Test 1 JS - Documents'. Below the title, there are 'Save & Close' and 'Save' buttons. A red box highlights the 'Edit' (pencil) and 'Delete' (trashcan) icons to the left of the document title 'Building Specs'. The table below shows the document details: Title (Building Specs), Contact (PROC OFFICER Jessica), Creation Date (10/27/2020), Last Modified on (10/27/2020), Validity End Date (1), and Version (1). The table has columns for Title, Contact, Creation Date, Last Modified on, Validity End Date, and Version. The 'Title' column shows the document name and its file type (.docx). The 'Contact' column shows the user who created it. The 'Creation Date' and 'Last Modified on' columns show the dates of creation and the last update. The 'Validity End Date' column shows the date when the document's validity ends. The 'Version' column shows the current version of the document.

Title	Contact	Creation Date	Last Modified on	Validity End Date	Version
Building Specs	PROC OFFICER Jessica	10/27/2020	10/27/2020		1

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.