# Add Team Members to a Sourcing Project in eMMA

## Quick Reference Guide

# Overview

This Quick Reference Guide (QRG) is intended for Procurement Officers and Buyers who need to add Team members to a Sourcing Project in the eMaryland Marketplace Advantage (eMMA). These instructions show how to add Team members to a Sourcing Project and assign project roles to those members.

This QRG assumes that the Procurement Officer/Buyer has already completed the steps for creating a Sourcing Project. If not, please see the QRG for Creating a Sourcing Project in eMMA first.

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

## Instructional Video

https://youtu.be/iy92rOTsDrM

# Step-by-Step Instructions

## Add Team Members to a Sourcing Project

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 that you're a part of displays.

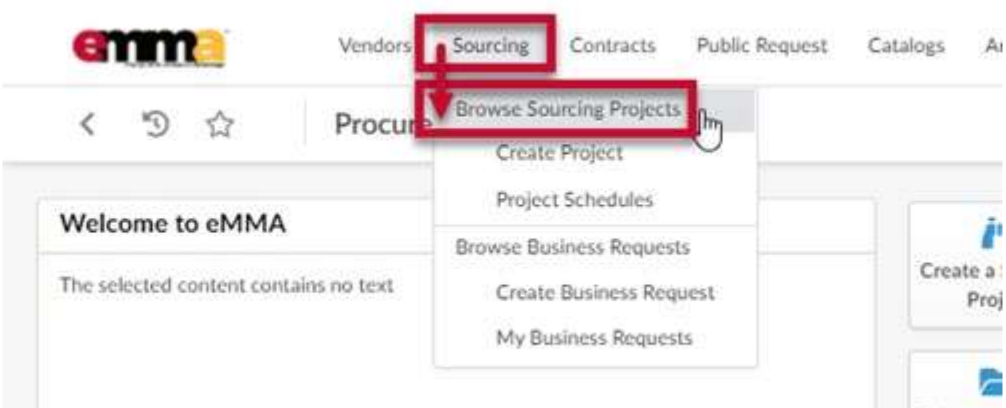


*Figure 1: The Sourcing tab and Browse Sourcing Projects in the drop-down menu.*

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


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

4. Click the **Team** tab on the left-hand side-panel and click the ellipsis (three dots) button. The Browse Users window opens and displays a list of users in eMMA.

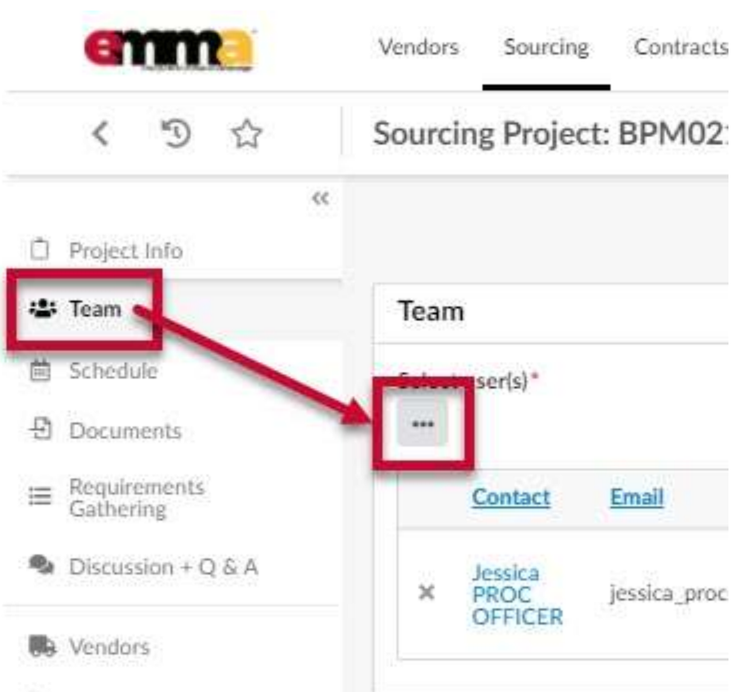


*Figure 3: The Team Tab in the left-hand side-panel and the ellipsis (three dots) button.*

5. Use the fields and filters to search for team members. Click the checkbox to the left of a team member you want to add. Repeat this step for each user on your Team and close the Browse Users window. The Team members you selected display on the Team page.

**NOTE:** Team members can have more than one profile in eMMA. You can click on the team member's name to view information about their eMMA profile.

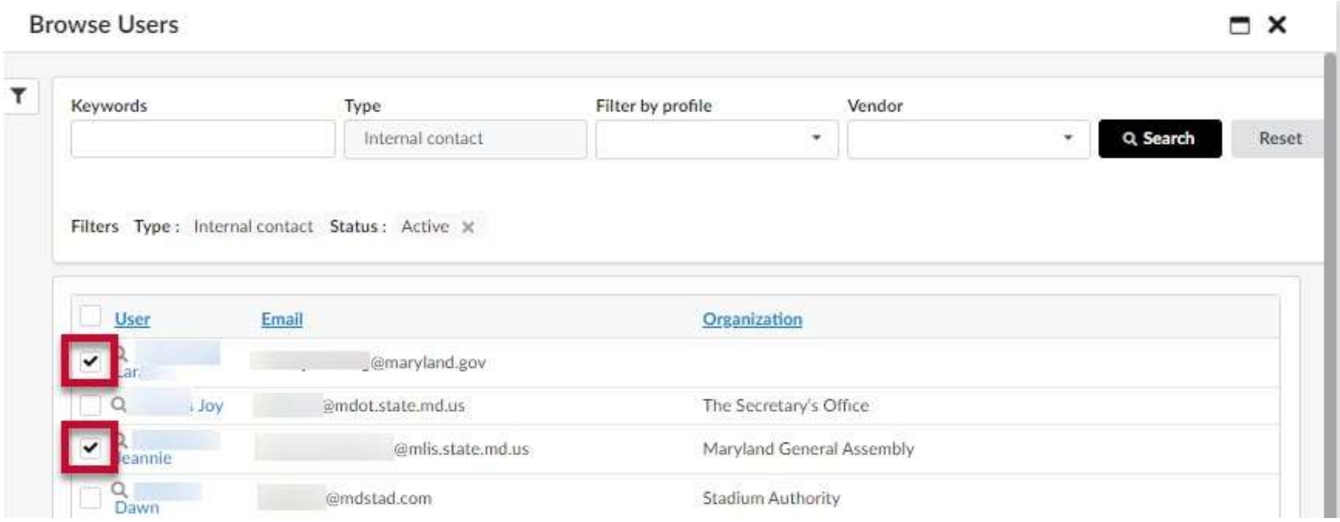


*Figure 4: Two users selected in the Browse Users window.*

6. (Optional) To remove a user, click the **X** to the left of the user's name.

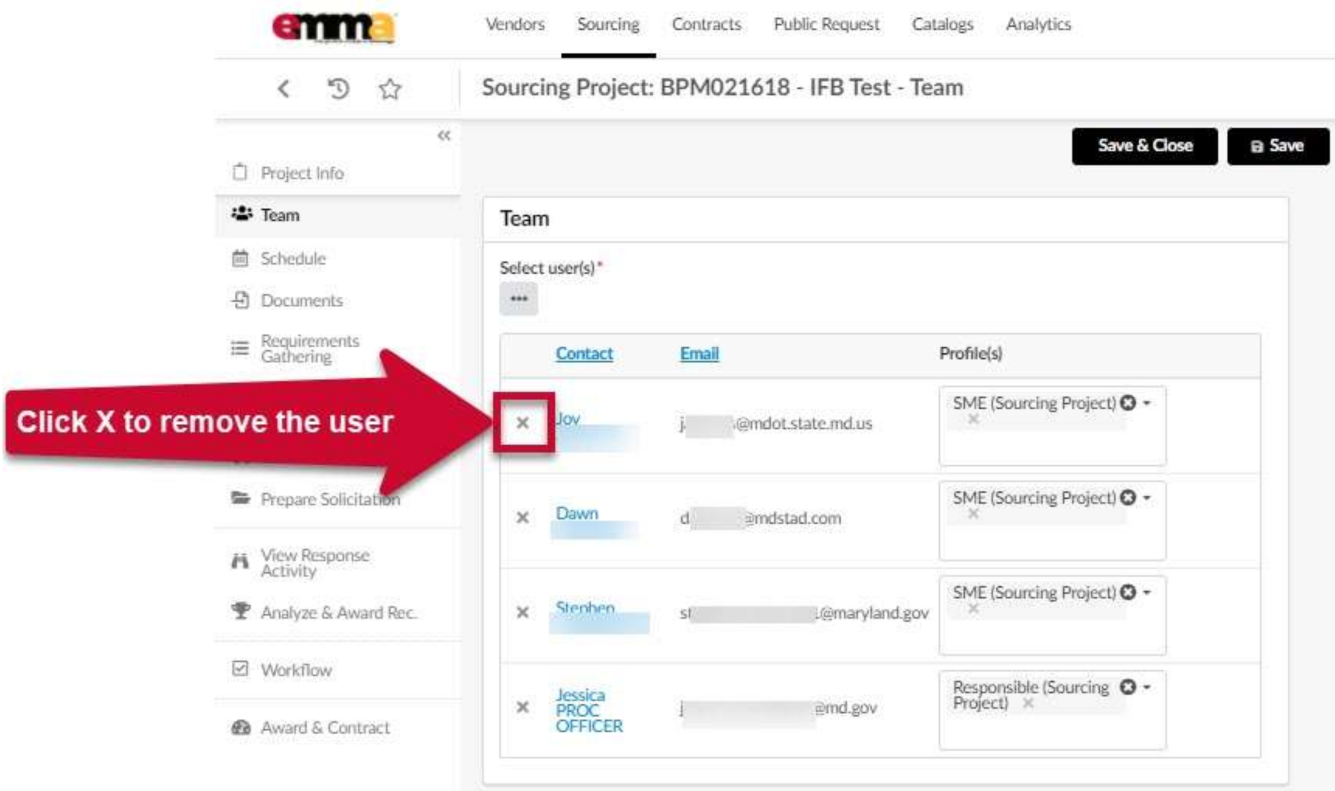


*Figure 5: Users listed on the Team page and the X on the left to remove a user.*

7. Click the field to the right of a user's email address, in the **Profile(s)** column, to open a drop-down menu.

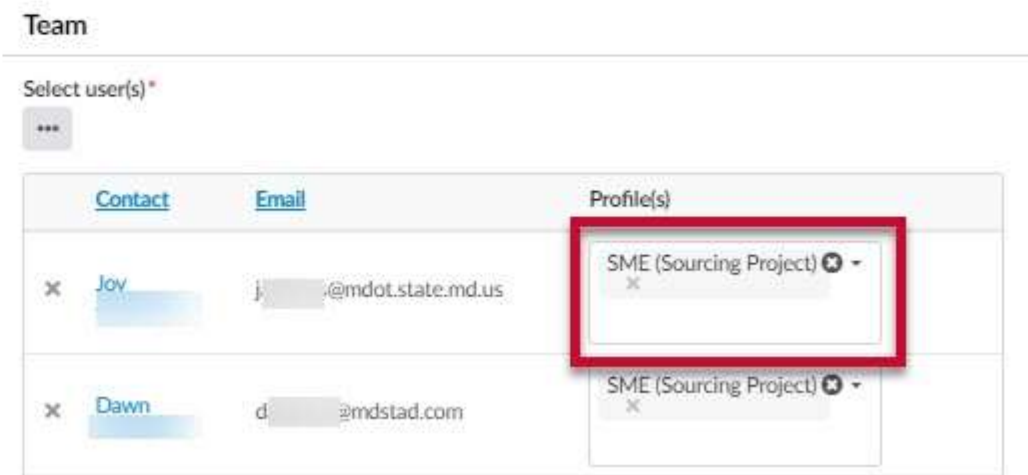


*Figure 6: The Profile field to the right of a user's email.*

8. Select a profile role for the user from the drop-down menu. By default, each user is assigned a role. Added users are assigned the SME (Sourcing Project) role, while the Procurement Officer is designated the Responsible (Sourcing Project) role by default. Profile roles and permissions are further defined below.

   **NOTE:** You can assign multiple roles but only one Responsible profile role for the Team.

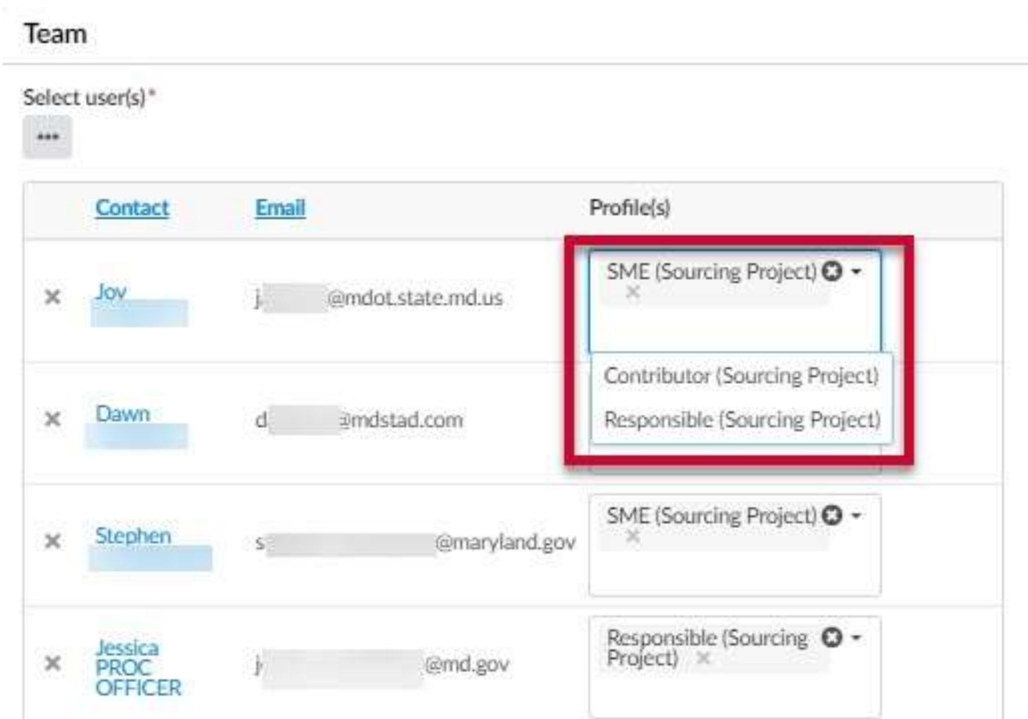


*Figure 7: The drop-down menu to assign profile roles for a user in a Team.*

Profile roles are defined as:

a. **Responsible (Sourcing Project):**
    i. This is the Owner of the Sourcing Project.
    ii. They have read, view, and edit access to the project.
    iii. All Vendor communications come to the person with this role.
    iv. You can only assign one user the Responsible role per project. However, you must have at least one Responsible role assigned.

b. **Contributor (Sourcing Project):**
    i. They have view access to the project and response activity.
    ii. They can edit information on the Project Information, Team, Schedule, and Documents tabs

c. **SME (Sourcing Project):**
    i. The Subject Matter Expert (SME) and default role assigned when you add a team member.
    ii. This member can be assigned tasks in eMMA.
    iii. They can receive email notifications (Forum messages).
    iv. They can respond to Requirements Gathering questions or Evaluate/Score when assigned the task.

9. (Optional) To remove a user's profile role, click the **X** to the right of the role in the respective field in the Profile(s) column.

    **NOTE:** If you remove the user's only role, it resets to the SME (Sourcing Project) role by default.


*Figure 8: The X to the right of a role to remove it from a user in a team.*

10. When you've completed adding your team members and assigning profiles, click the **Save** button at the top of the page.

    **NOTE:** You must remember to click the Save button. If you don't, you will lose your progress on this tab.


*Figure 9: The Save button at the top of the Team page.*