

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.

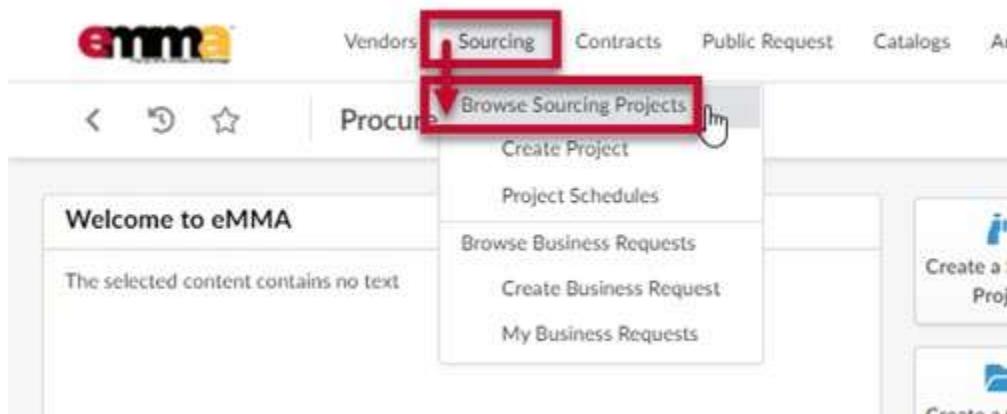


Figure 1: The Sourcing tab and Browse Sourcing Projects in the drop-down menu.

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.

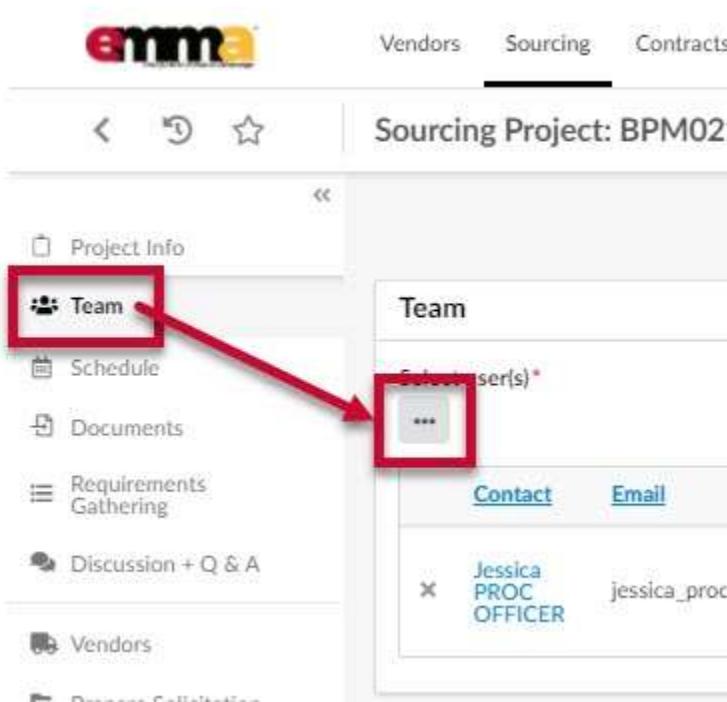


A screenshot of the eMMA software interface showing a list of projects. The top navigation bar includes '+ Create Project' and 'Duplicate Project' buttons. The main area displays a table with columns for 'ID', 'Project', and 'Type'. The first project listed is 'PM021302 IFB Test 1 JS', which is highlighted with a red box around its edit icon (a pencil symbol). The 'Type' column for this project is 'IFB: Invita Bid (LP)'. Below it are two more projects: 'BPM021301 MMIS II IV&V Masters (created 10/22/20)' and 'BPM021299 Juniper MITDP VoIP Upgrades', both listed as 'Secondary'.

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

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.



A screenshot of the eMMA software interface showing a 'Sourcing Project: BPM02' page. The top navigation bar includes 'Vendors', 'Sourcing' (which is selected), and 'Contracts'. The left-hand side-panel has a 'Project Info' section with tabs for 'Team' (which is highlighted with a red box), 'Schedule', 'Documents', 'Requirements Gathering', 'Discussion + Q & A', and 'Vendors'. A red arrow points from the 'Team' tab in the side-panel to the '... (three dots)' button in the 'Team' section of the main content area. The 'Team' section displays a table with a column for 'Select user(s)*' and a 'Contact' tab showing a user named 'Jessica PROC OFFICER' with the email 'jessica_proc'.

Select user(s)*

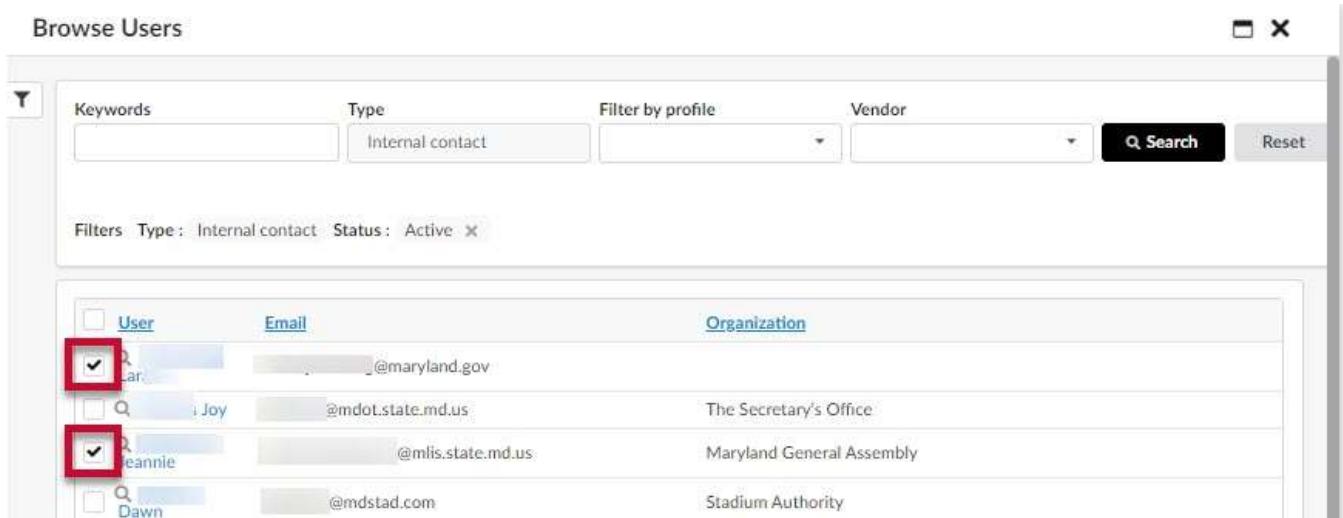

Figure 3: The Team Tab in the left-hand side-panel and the ellipsis (three dots) button.

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.

Browse Users

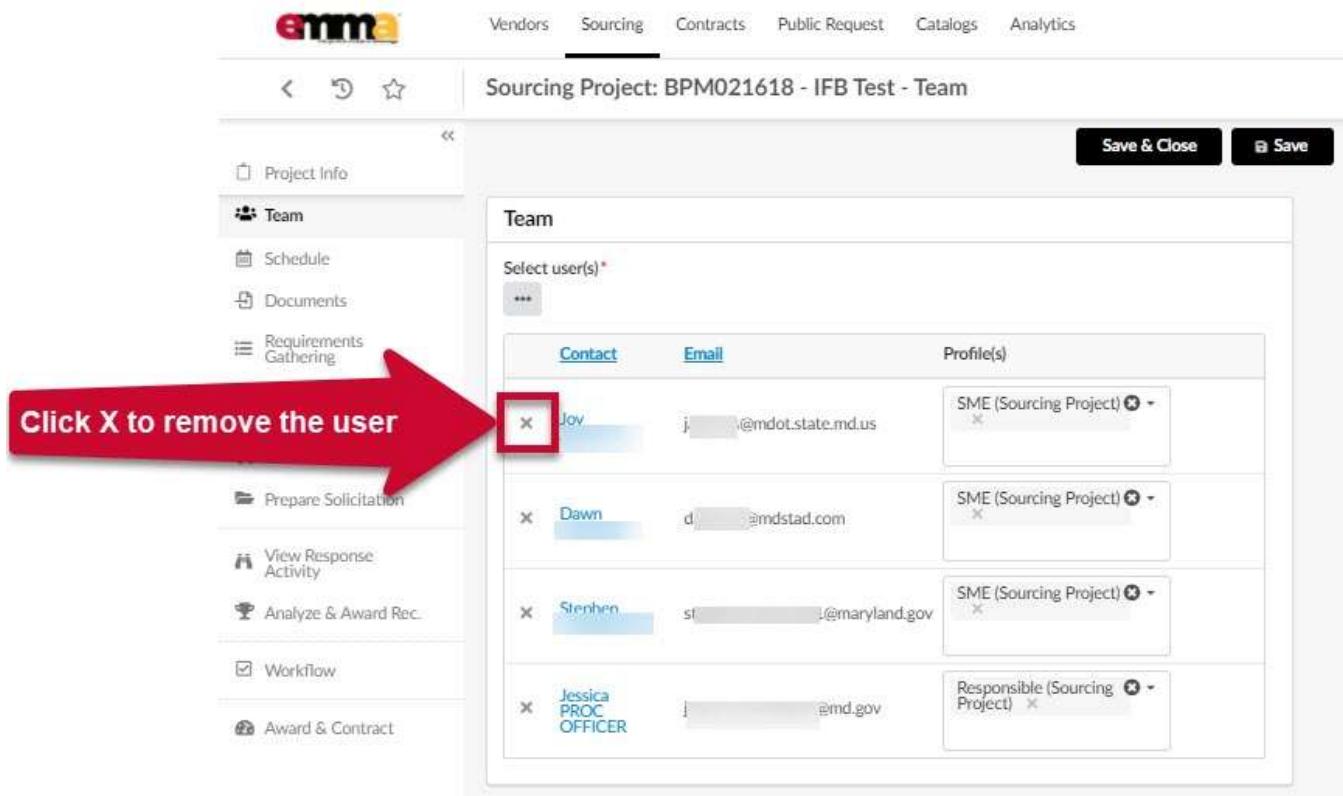


The screenshot shows the 'Browse Users' window with the following interface elements:

- Header: 'Keywords' (empty), 'Type' (set to 'Internal contact'), 'Filter by profile' (dropdown), 'Vendor' (dropdown), 'Search' button, 'Reset' button.
- Filters: 'Type: Internal contact' and 'Status: Active'.
- Table: 'User' (checkbox column), 'Email' (list of users), 'Organization' (list of organizations). Two users are selected: 'Joy' and 'Leanne', both highlighted with red boxes.

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.



The screenshot shows the 'Team' page with the following interface elements:

- Header: 'Vendors', 'Sourcing' (selected), 'Contracts', 'Public Request', 'Catalogs', 'Analytics'.
- Page Title: 'Sourcing Project: BPM021618 - IFB Test - Team'.
- Left Sidebar: 'Project Info', 'Team' (selected), 'Schedule', 'Documents', 'Requirements Gathering'.
- Right Panel: 'Team' section with 'Select user(s)*' and a list of users with their profiles and remove buttons (red arrow points to the remove button for 'Joy').
- Bottom Buttons: 'Save & Close' and 'Save'.

Click X to remove the user

Contact	Email	Profile(s)
Joy	j...@mdot.state.md.us	SME (Sourcing Project) X
Dawn	d...@mdstad.com	SME (Sourcing Project) X
Stephen	st...@maryland.gov	SME (Sourcing Project) X
Jessica PROC OFFICER	j...@md.gov	Responsible (Sourcing Project) X

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.

Team

Select user(s)*

...

Contact	Email	Profile(s)
Joy	j...@mdot.state.md.us	SME (Sourcing Project)  
Dawn	d...@mdstad.com	SME (Sourcing Project)  

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.

Team

Select user(s)*

...

Contact	Email	Profile(s)
Joy	j...@mdot.state.md.us	SME (Sourcing Project)  
Dawn	d...@mdstad.com	Contributor (Sourcing Project) Responsible (Sourcing Project)  
Stephen	s...@maryland.gov	SME (Sourcing Project)  
Jessica PROC OFFICER	j...@md.gov	Responsible (Sourcing Project)  

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.



The screenshot shows the 'Team' section of the eMMA interface. At the top, there is a 'Select user(s)*' field with a dropdown arrow and a '...' button. Below this, there are 'Contact' and 'Email' tabs, with 'Contact' being the active tab. A table lists a user named 'Inv' with the email '@mdot.state.md.us'. To the right of the user's name is a 'Profile(s)' column. A dropdown menu is open, showing two options: 'Contributor (Sourcing Project)' and 'SME (Sourcing Project)'. The 'Contributor (Sourcing Project)' option has a red box drawn around its 'X' button, indicating it is the target for removal.

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.

«

Sourcing Project: BPM021302 - IFB Test 1 JS - Team

Search

Project Info

Team

Schedule

Documents

Requirements Gathering

Discussion + Q & A

Save & Close

Save

Team

Select user(s)*

...

Contact	Email	Profile(s)
x Lar.	@maryland.gov	Contributor (Sourcing Project)

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