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

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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 **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 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.

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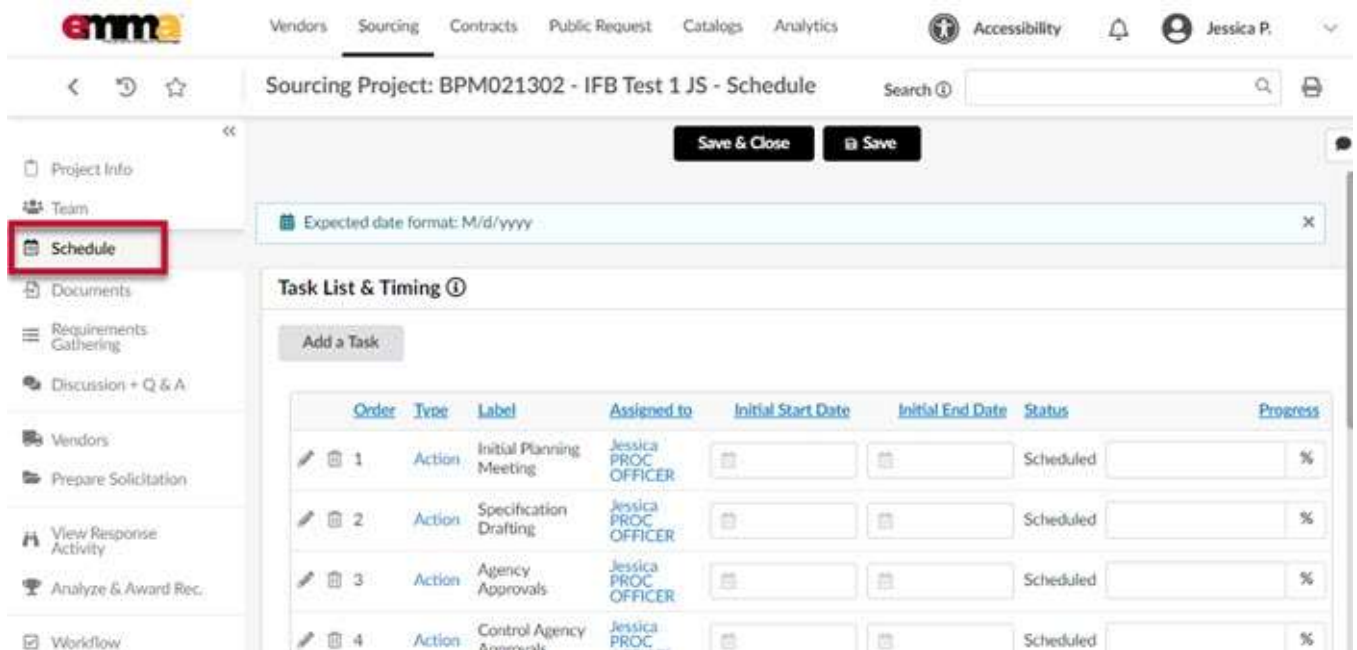
Figure 3: The Schedule tab and task list for an IFB project

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

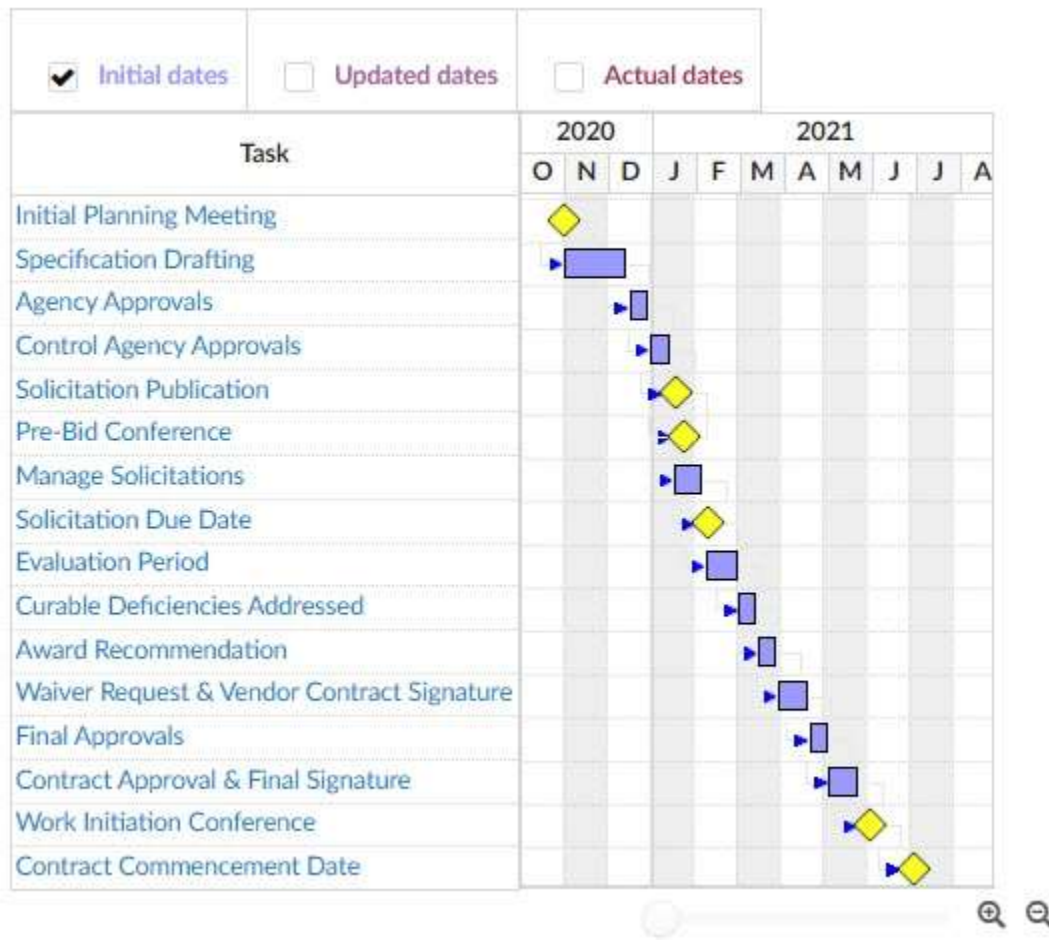point on the chart to see a pop-up with more details about it.

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.

Figure 5: The fields for the Information section.

  a. **Task Label (*):** Enter a label for your new task in this field.

  b. **Type (*):** Click this field to select a type for this task;
      i. Action (the default type)
      ii. E-Mail Sent
      iii. Event/Workshop
      iv. Mail Sent
      v. Phase
      vi. Phone Contact
      vii. Meeting

  c. **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.

  d. **Description:** Enter a brief description for the task.

  e. **Status:** Click this field to select a status for this task;
      i. Scheduled (the default status)
      ii. Not Started
      iii. In progress
      iv. Complete
      v. Close

  f. **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.

  g. **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.

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