Create a Contract from Scratch in eMMA
Quick Reference Guide

Overview

Some users may only need eMMA to create a contract and nothing else. This Quick Resource Guide (QRG) is intended for Buyers and Procurement Officers who only need to create a contract in the eMaryland Marketplace Advantage (eMMA) for projects or solicitations awarded outside of the eMMA solicitation process. It shows how to create a contract in eMMA.

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

Step-by-Step Instructions

Create a Contract from Scratch

NOTE: This QRG is only for users who need to create a contract for a solicitation that is not entered in eMMA. If you need to create a contract for a solicitation in eMMA, please see the QRG Create a Contract for an Awarded Solicitation.

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 **Contracts** tab at the top of the homepage to open the drop-down menu and select the **Create Contract** option.

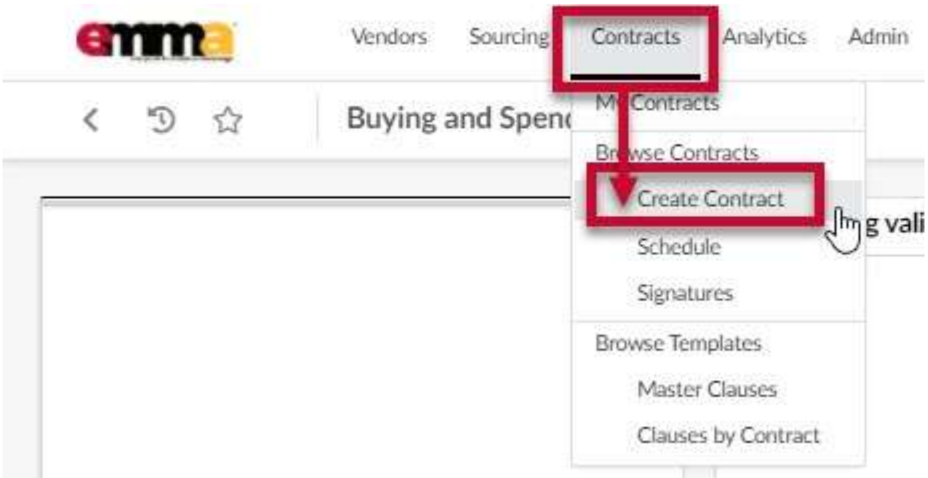


Figure 1: The Create Contract option in the Contracts tab drop-down menu.

3. Enter information in the form fields **Contract Header** section. A red asterisk (*) indicates a required field.

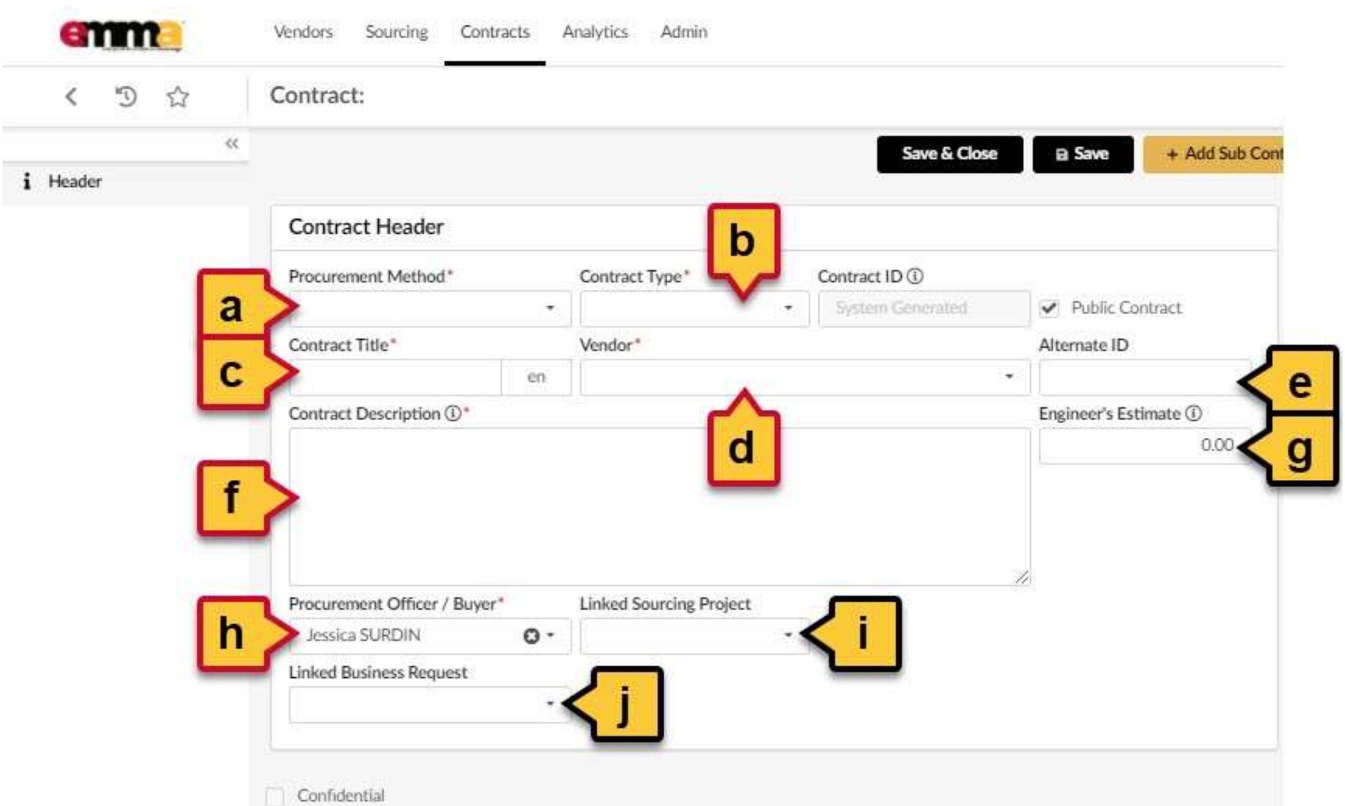


Figure 2: The form fields for creating a contract.

   a. **Procurement Method (*):** Enter the procurement method for this contract in this field.

   b. **Contract Type (*):** Click this field to open the drop-down menu and select an option.

i. Master Without Secondary Competition
ii. Master With Secondary Competition
iii. Individual
iv. Secondary Level Agreement

c. **Contract Title (*):** Enter a title for your contract in this field.

d. **Vendor (*):** Enter your Vendor's name in this field. You can also click the **See All** option and search for your Vendor. See All opens a new window that lists all Vendors. Click the checkbox to the left of the vendor to select it.

e. **Alternate ID:** This field is an additional identifier. If you have a Financial Management Information System (FMIS) number, external project number or an internal contract number, enter it here. If not, then skip this field.

f. **Contract Description (*):** Enter a brief description of your contract in this field.

g. **Engineer's Estimate:** Enter the Engineer's estimate in U.S. dollars in this field, if applicable.

h. **Procurement Officer/Buyer (*):** Click this field to open the drop-down menu and select the **See All** option. Click the checkbox to the left of the Procurement Officer or buyer you want for this contract.

i. **Linked Sourcing Project:** If you have a sourcing project linked to this Contract, click this field and select the **See All** option at the bottom of the drop-down menu. Search for the related sourcing project and click the checkbox to the left of it. Close the window. The selected sourcing project populates this field.

j. **Linked Business Request:** If you have a business request linked to this Contract, click this field and select the **See All** option at the bottom of the drop-down menu. Search for the related business request and click the checkbox to the left of it. Close the window. The selected business request populates this field.

4. Enter information in the form fields for the **Contract Dates** section. A red asterisk (*) indicates a required field.

Figure 3: The Contract Dates section to create a contract.

a. **Effective Date (*):** By default, today's date shows in this field. If you need to change it to a future date, click this field and select the date from the calendar that opens.

b. **Advertise Date:** Click this field and select the date on which the related solicitation was advertised.

c. **Award Date:** Click this field and select the date on which the solicitation was awarded.

d. **Fiscal Effective Date:** Click this field and select the date when the funding for your project was approved.

e. **Expiration Date (*):** Click this field and select the expiration date for this contract.

IMPORTANT: If you are entering information for a **MASTER** contract (with or without Secondary

Competition), you will see a field for **No End Date**. Click this field and select the **Yes** option from the drop-down menu. **No** is the default selection for this field.

Figure 4: The No end date field for a Master contract.

f. **Actual End Date:** Click this field and select the date when the contract actually ended.
g. **Fully Executed Date:** Click this field and select the date when the contract was fully executed.

5. Enter information in the form fields for the **Option & Review Schedule** section. A red asterisk (*) indicates a required field.

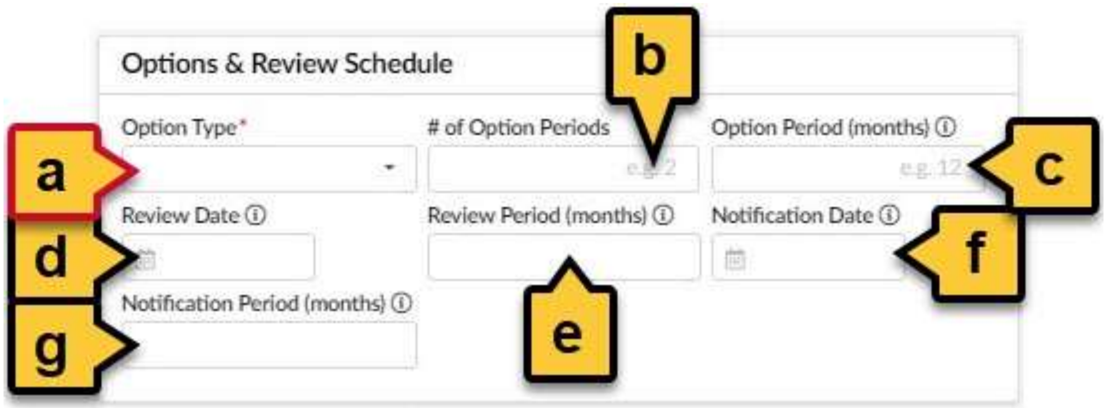


Figure 5: The Options & Review Schedule section to create a contract.

a. **Option Type (*):** Depending on whether your contract has options, click this field and select either **No Options**, or **Option(s) with Same Terms**.

NOTE: If you select **Option(s) with Same Terms**, optional fields (b) **# of Option Periods**, and (c) **Option Period (months)** become mandatory fields. The **Total Options Amount** field appears in the Negotiated Terms tab and becomes mandatory as well.

b. **# of Option Periods:** Enter the number of option periods for this contract.
c. **Option Period (months):** Enter the number of months a contract is extended upon renewal.
d. **Review Date:** Click and select the date to review this contract. It should be before or on the same as the notice date.
e. **Review Period:** Enter the time in months (ahead of the minimum notice period) reserved for reviewing the upcoming renewal or termination for the contract.
f. **Notification Date:** Enter the date that you want the notice sent out. It must be prior or equal to the contract end date or the actual end date.
g. **Notification Period (months):** Enter the minimum number of months' notice required before termination or auto-renewal (per the contract).

6. Enter information in the form fields for the **Contract Scope** section. A red asterisk (*) indicates a required field.

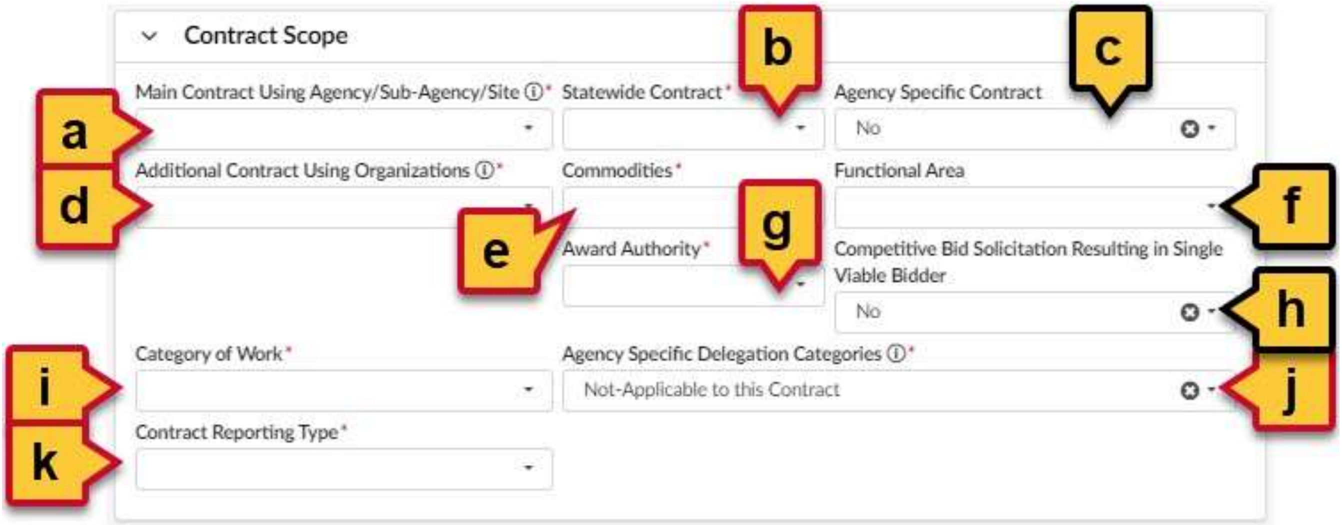


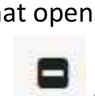
Figure 6: The Contract Scope section to create a contract.

a. **Main Contract Using Agency/Sub-Agency/Site (*):** Click this field to open a drop-down menu and select the **See All** option at the bottom. In the new window that opens, search for the Main Contract Using Agency/Sub-Agency/Site. Use the plus  and minus  icons to the left of the agencies to expand and collapse them. Select the checkbox to the left of the appropriate agency. The selected agency populates in this field.

b. **Statewide Contract (*):** Is this a Statewide Contract? Click this field and select **Yes** or **No** from the drop-down menu.

c. **Agency Specific Contract:** Is this an agency-specific contract? Click this field and select **Yes** or **No** from the drop-down menu.

d. **Additional Contract Using Organizations (*):** Click this field to open a drop-down menu and select the **See All** option at the bottom. In the new window that opens, search for any additional organizations that may use this contract. Use the plus  and minus  icons to the left of the agencies to expand and collapse them. Select the checkbox to the left of the appropriate agency. The selected agency populates in this field.

e. Commodities (*): Click this field to open a drop-down menu and select the See All option at the bottom. In the new window that opens search for any commodities that pertain to your sourcing project. Use the plus  and minus  icons to the left of the commodity to expand and collapse them. Select the checkbox to the left of the appropriate commodity. Choose as many commodities as are necessary and close the window. The selected commodity(ies) populate in this field.

f. **Functional Area:** This field is only used in Secondary competitions, for IT procurement. Enter your main commodity in this field if this applies to your project.

IMPORTANT: This Functional Area is not the same functional area that the State Procurement Office may be familiar with. This field offers a list of commodities. Click this field and select your Main

Commodity for the time being from the drop-down list.

g. **Award Authority (*):** Click this field to open the drop-down menu and select the group with the authority to award the contract.

h. **Competitive Bid Solicitation Resulting in Single Viable Bidder:** This field relates to whether you received more than one bid for your solicitation. Click this field and select the option Yes or No from the drop-down menu.

i. **Category of Work (*):** Click this field to open the drop-down menu and select the category of work that pertains to this project.

   i. **Hiring Agreement (*):** Depending on your selection for Step 6i, this field displays to the right of the Category of Work field. Click this field and select **Yes** or **No** from the drop-down menu.

j. **Agency Specific Delegation Categories (*):** Click this field to open a drop-down menu. This captures unique agency categories in addition to the work categories listed.

k. **Contract Reporting Type (*):** Click this field and select your contract type from the drop-down menu.

7. Click the **Save** button at the top of the Header page.

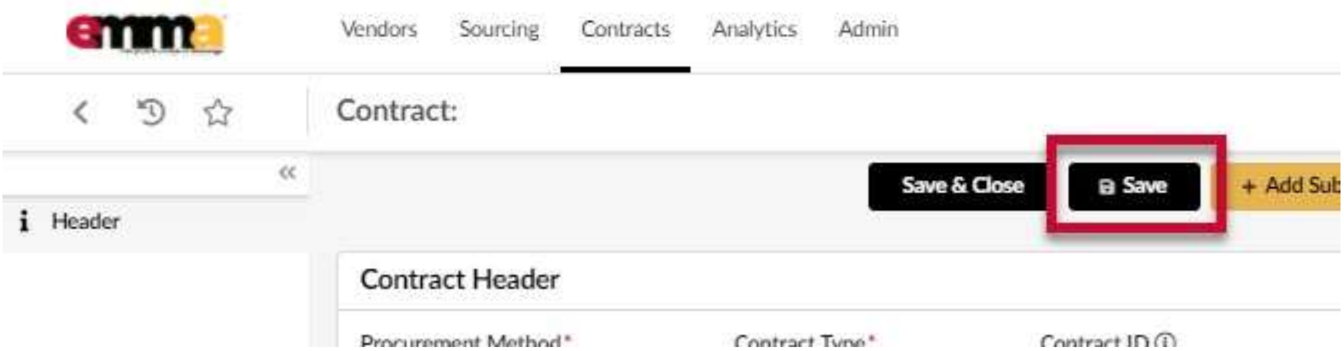
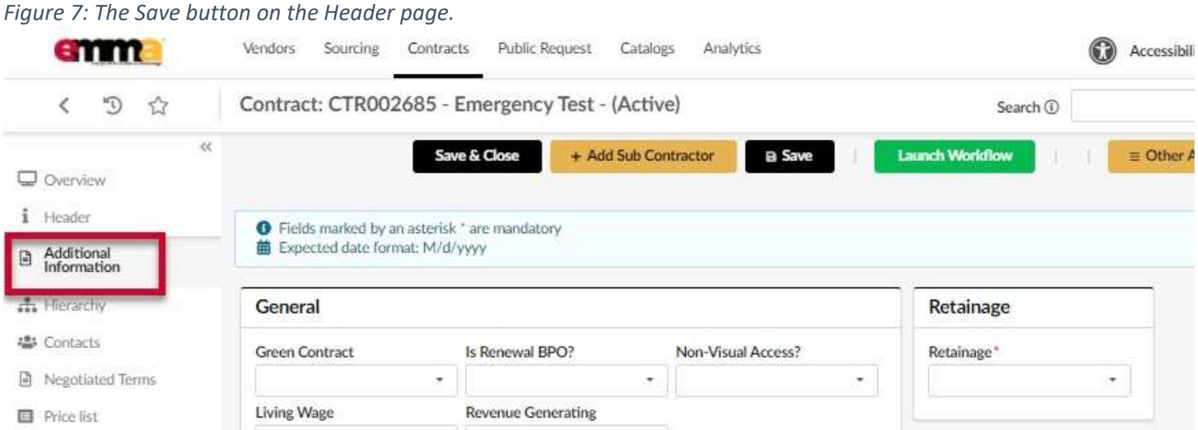


Figure 7: The Save button on the Header page.



8. Click the **Additional Information** tab from the left-hand side-panel.

Figure 8: The Additional Information tab in the left-hand side-panel.

9. Click the **Retainage** field in the Retainage section on the right side of the page to open the drop-down menu and select **Yes** or **No** from the menu.

   NOTE: Additional fields may display depending on the selection you make.

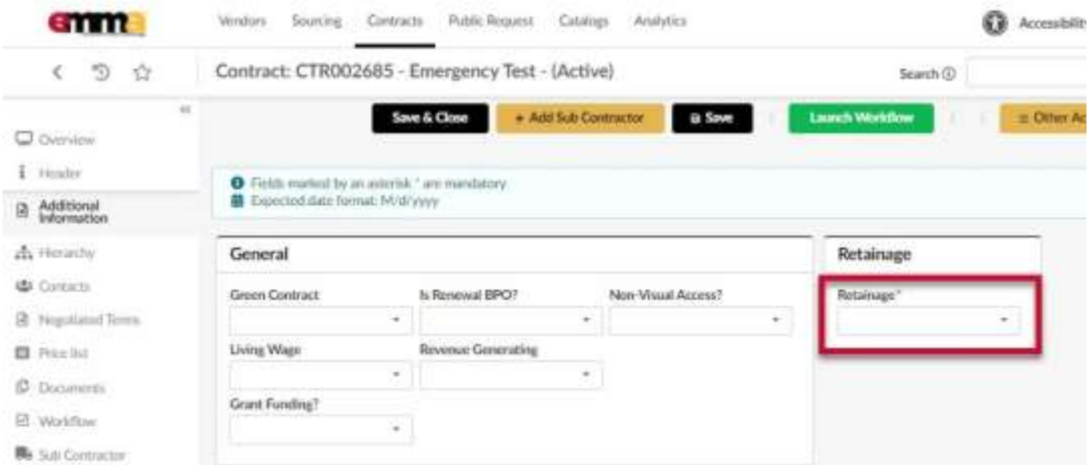


Figure 9: The Retainage field in the Retainage section.

10. If you selected **Yes** in the previous step, follow these instructions. If not, skip to Step 17.

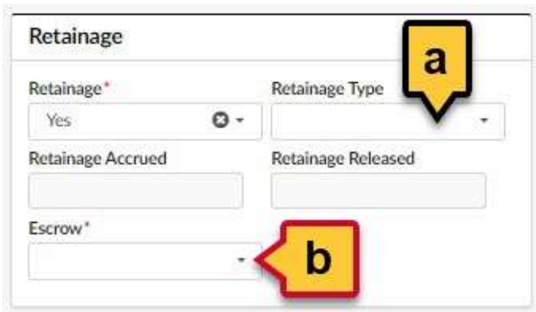


Figure 10: The form fields for the Retainage section.

   a. Click the **Retainage Type** field to open the drop-down menu and select either **F: Fixed Amount** or **P: Percentage**. A new mandatory field opens to the right depending on your selection. Enter the Amount or Percentage required in the field based on your selection. For **Retainage Amount (*)**, enter a dollar amount. For **Retainage Percentage (*)**, enter the percentage amount.
   b. Click the **Escrow (*)** field to open the drop-down menu and select **Yes** or **No** from the menu. If you select Yes, a new field displays to the right. Click the **Escrow Vendor** field and search for the Vendor in charge of escrow for your project.

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

IMPORTANT: If you skip this step you risk losing your work to this point.

12. Enter information in the Program Goals section. New fields may display depending on your selections. A red asterisk (*) indicates a required field.

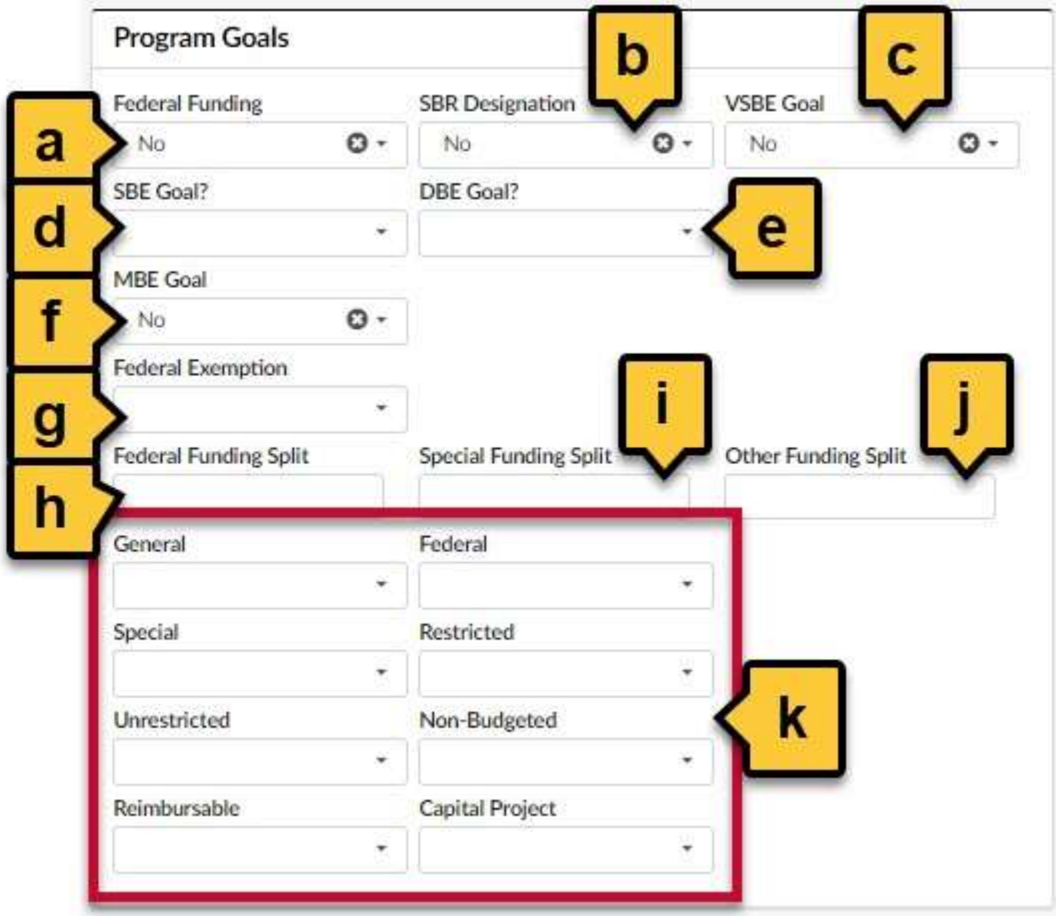


Figure 11: The form fields in the Program Goals section.

c. **Federal Funding:** Does your project have Federal funding? Click this field and select **Yes** or **No**.
d. **SBR Designation:** Does your project have a Small Business Reserve (SBR) Designation? Click this field and select **Yes** or **No**.
e. **VSBE Goal:** Does your project have a Veteran-owned Small Business Enterprise (VBSE) goal? Click this field and select **Yes** or **No**.
    i. If you selected Yes,
        1. The **VSBE Goal % (*)** field displays. Enter a percentage for your VSBE goal.
        2. The **VSBE Waiver (*)** field displays in the Waiver section to the right. Click this field and select **Yes** or **No**.
            a. If you select **Yes**, 7 new fields display.

i. VSBE Waiver Percentage (*)
ii. VSBE Dollar Commitment

iii. VSBE Waiver Request Date (*)
iv. VSBE Waiver Requested Amount
v. VSBE Waiver Approved Date
vi. VSBE Waiver Approved Amount

f. **SBE Goal?:** Does your project have an Small Business Enterprise (SBE) goal? Click this field and select **Yes** or **No**.

g. **DBE Goal?:** Does your project have a Disability Business Enterprise (DBE) goal? Click this field and select **Yes** or **No**.

   i. If you selected **Yes**, two new fields display:

      1. **DBE Participation (%) (*):** Enter a percentage for your DBE participation goal.
      2. **DBE Waiver (*):** This field displays in the Waiver section to the right. Click this field and select **Yes** or **No**.

         a. If you select **Yes**, 6 new fields display in the Waiver section. Enter the appropriate answers in the respective fields as they apply to your project.

Figure 12: The DBE Waiver fields in the Waiver section.

i. DBE Waiver Percentage (*)
ii. DBE Dollar Commitment
iii. DBE Waiver Request Date (*)
iv. DBE Waiver Requested Amount
v. DBE Waiver Approved Date
vi. DBE Waiver Approved Amount

h. **MBE Goal:** Does your project have a Minority-owned Business Enterprise (MBE) goal? Click this field and select **Yes** or **No**.

   i. If you selected Yes, three new fields display:

      1. **MBE Goal (%) (*):** Enter the percentage for your MBE goal in this field.
      2. **MBE Sub-Goals:** Does your project have MBE sub-goals? Click this field and select **Yes** or **No**.

         a. If you selected **Yes**, six new fields display. Enter the appropriate percentages in the respective fields as they apply to your project:

Figure 13: The MBE goal and percentage fields in the Program Goals section.

i. Native American MBE Participation (%)
ii. African American MBE Participation (%)
iii. Asian American MBE Participation (%)

iv. Hispanic American MBE Participation (%)
v. Women-owned MBE Participation (%)
vi. Minority Subcontractor: Click this field and select **Yes** or **No**.

3. **MBE Waiver (*):** This field displays in the Waiver section to the right. Click this field and select **Yes** or **No**.
    a. If you select **Yes**, six new fields display in the Waiver section. Enter the appropriate answers in the respective fields as they apply to your project.

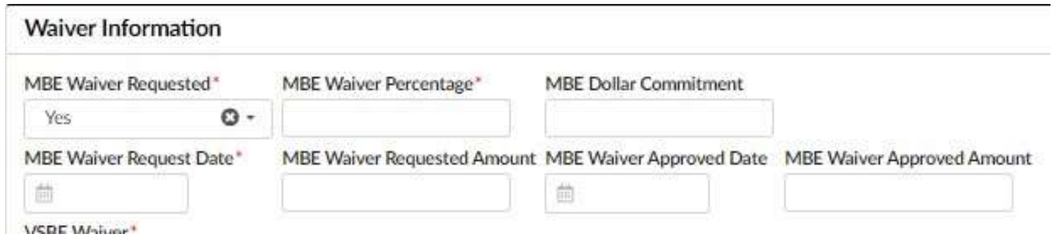


Figure 14: the MBE Waiver fields in the Waiver section.

i. MBE Waiver Percentage (*)
ii. MBE Dollar Commitment
iii. MBE Waiver Request Date (*)
iv. MBE Waiver Requested Amount
v. MBE Waiver Approved Date
vi. MBE Waiver Approved Amount

i. **Federal Exemption:** Does your project have Federal exemption? Click this field and select **Yes** or **No**.
j. **Federal Funding Split:** If your project has Federal funding, enter the split (in decimal form) in this field.
k. **Special Funding Split:** If your project has special funding, enter the split (in decimal form) in this field.
l. **Other Funding Split:** If your project has other funding, enter the split (in decimal form) in this field.
m. For the fields at the bottom of this section related to funding, please refer to your fund certification to fill these fields in correctly.

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

IMPORTANT: If you skip this step you risk losing your work to this point.

14. Click the **Documents** tab on the left-hand side-panel.

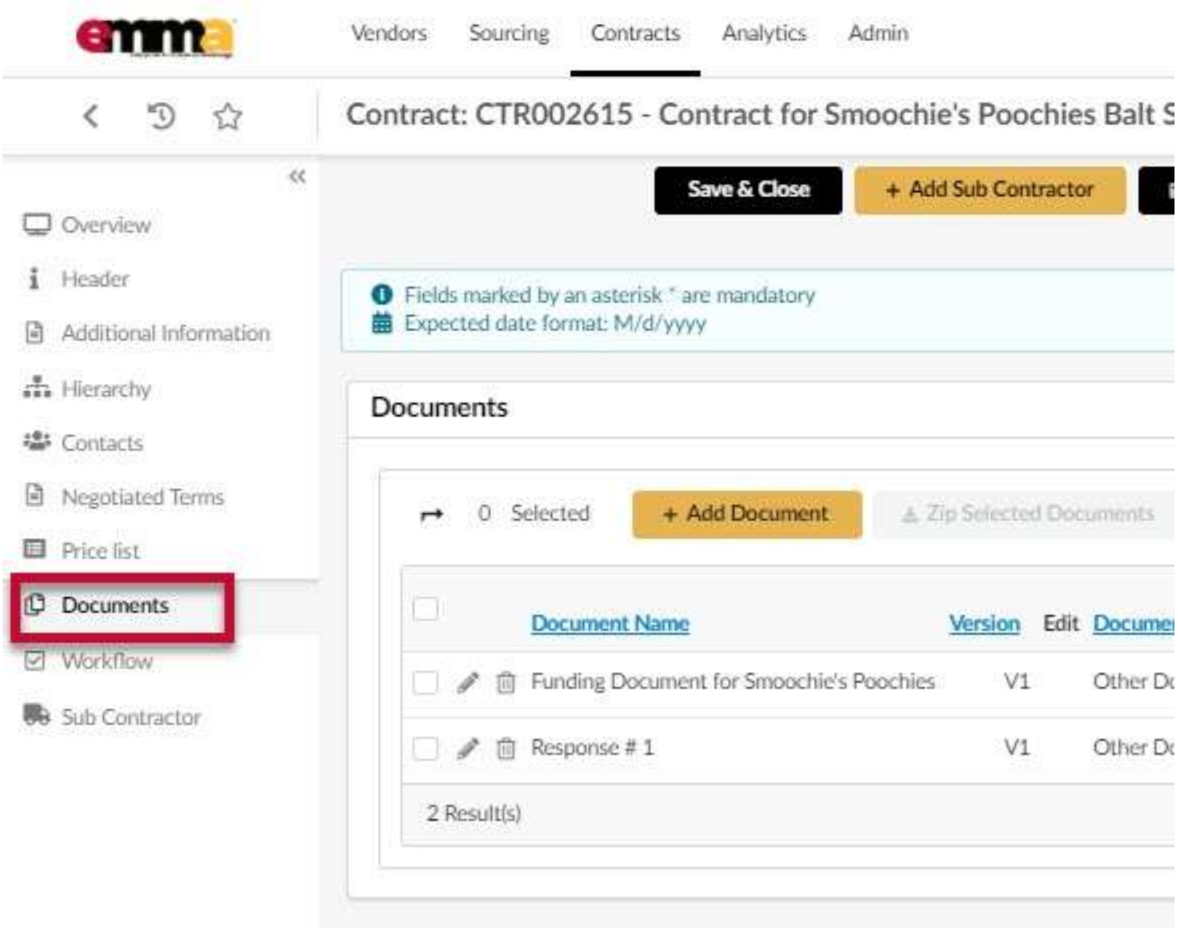


Figure 15: The Documents tab in the left-hand side-panel.

15. (Optional) If you have existing documents on this page, then you will see two buttons to the right of the document; **Create New Version** and **Finalize**.

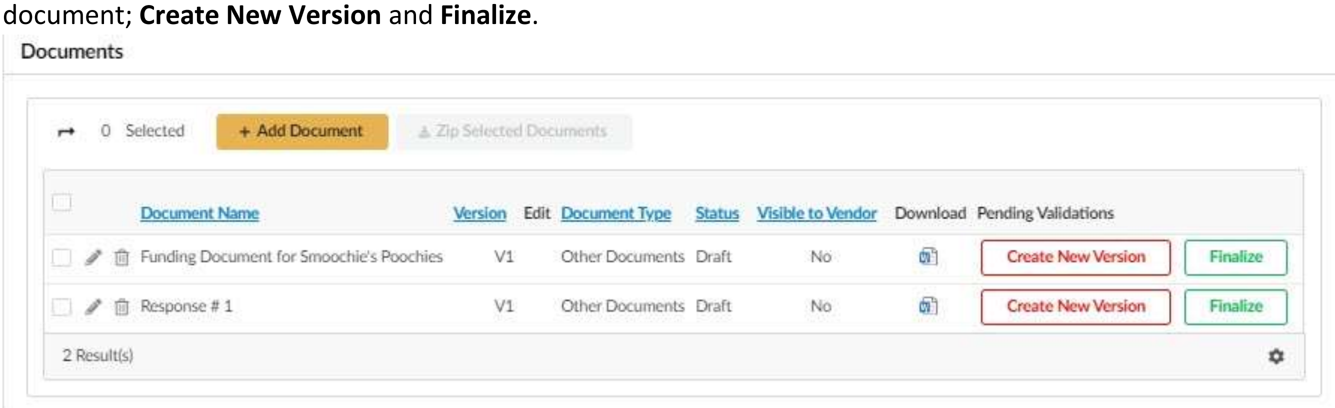


Figure 16: The Create New Version and Finalize buttons for two documents added to the contract in eMMA.

n. Click the **Create New Version** button to upload a new version of the document if necessary.
o. Click the **Finalize** button **ONLY** if this is the final version.

IMPORTANT: DO NOT CLICK THIS BUTTON if the document needs alterations or signatures. Only click the Finalize button when no further changes or signatures are needed.

16. Click the **+ Add Document** button. Any attached documents are listed on this page.

    NOTE: Uploaded documents may not exceed 300,000 KB.

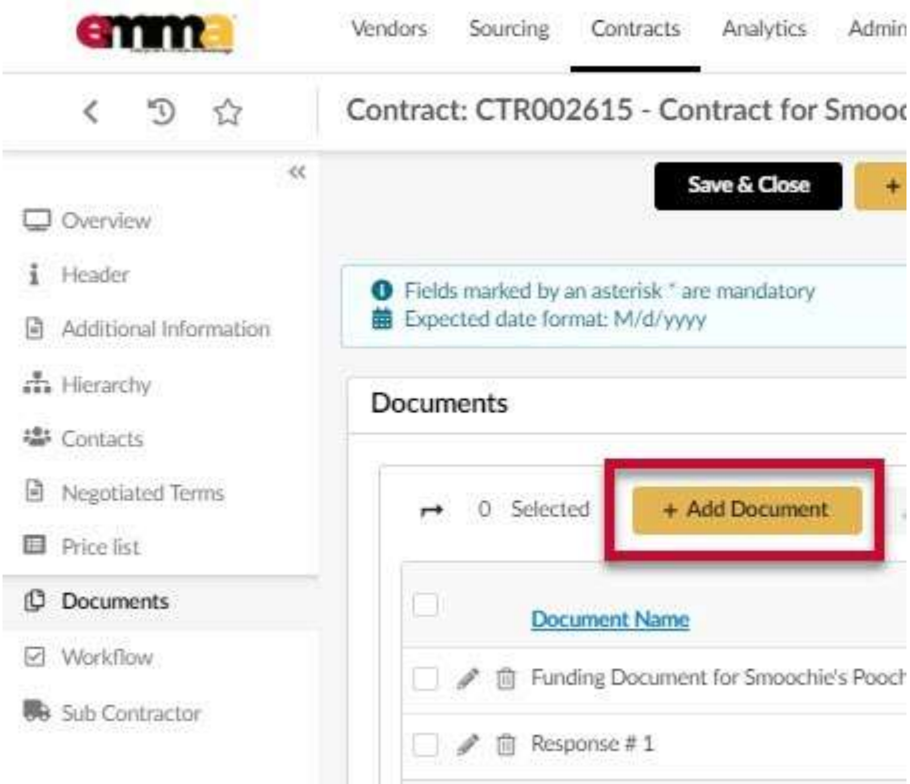


Figure 17: The + Add Document button on the Documents page.

17. From the drop-down menu that opens, select the **Certificate of Standing** option. The Document pop-up window opens.

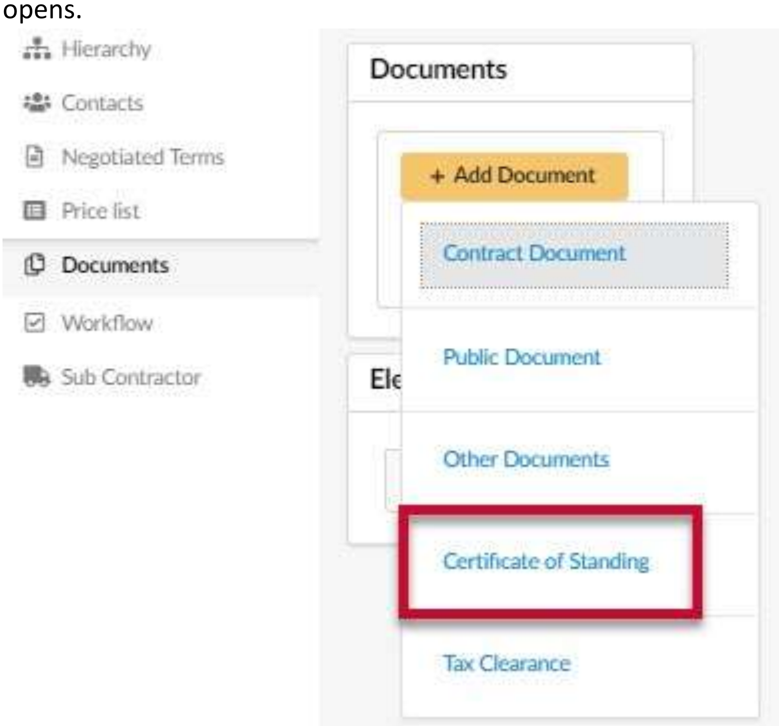


Figure 18: The Certificate of Standing option in the +Add Document drop-down menu.

18. Enter the appropriate information in the respective fields. A red asterisk (*) indicates a required field.

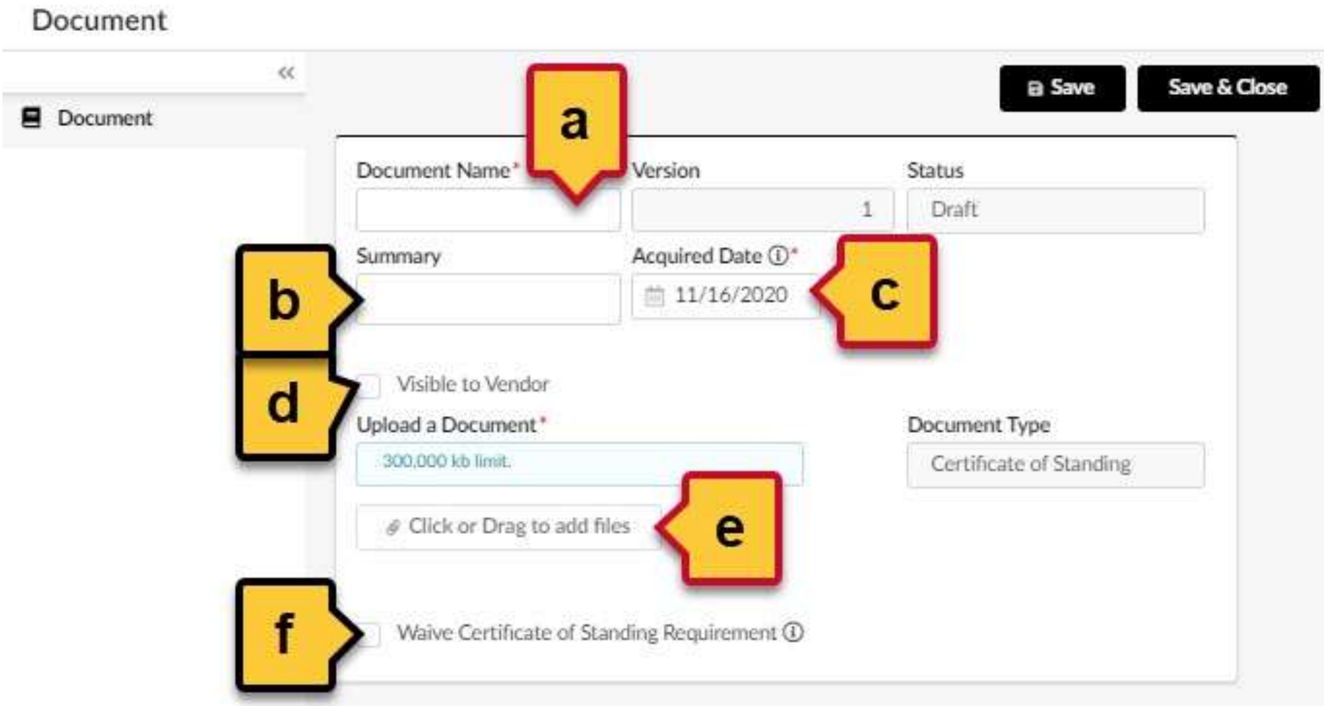


Figure 19: The Document window to add a Document to a contract.

a. **Document Name (*):** Enter a name for the document in this field.
b. **Summary:** Enter a brief summary of the document in this field.
c. **Acquired Date (*):** This date auto-populates with today's date. Click this field to select a different date.
d. **Visible to Vendor:** You must select this checkbox if you want Vendors to be able to view this document.
e. **Click or Drag to add files (*)** button**:** Click this button to browse your device for a file or drag a file to this button to add it.

   NOTE: Uploaded files cannot exceed 300,000 KB.

   NOTE: You cannot directly edit documents in eMMA, but you can upload new versions.

f. **Waive Certificate of Standing Requirement:** Select this checkbox to waive the certificate of standing requirement.
   i. If you select this checkbox, the **Reason for Waiver Request (*)** field displays. Enter the reason for waiving this requirement.

19. Click the **Save & Close** button in the Document pop-up window. The document displays on the Documents page.

20. Click the **In Good Standing** button to the right of the Certificate of Standing document you added.

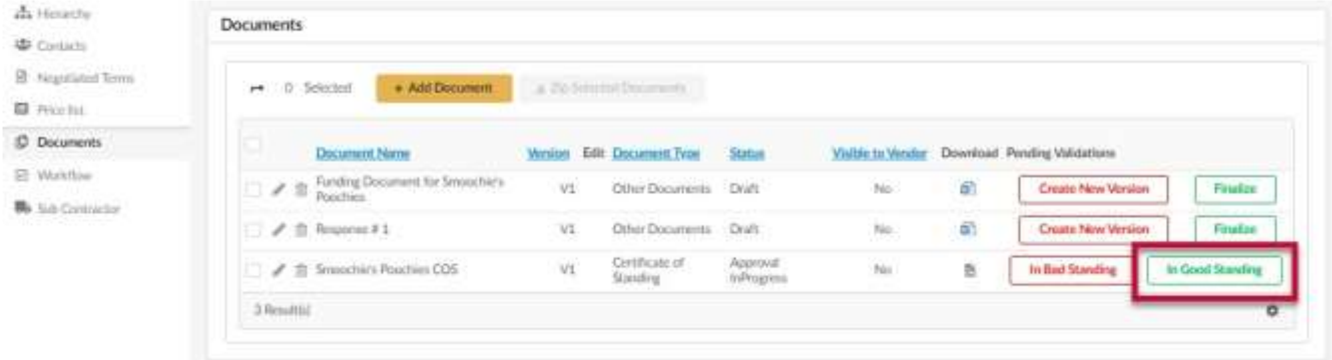


Figure 20: The In Good Standing button to the right of an added Certificate of Standing document.

21. Click the + **Add Document** button to open the drop-down menu and select the **Tax Clearance** option.

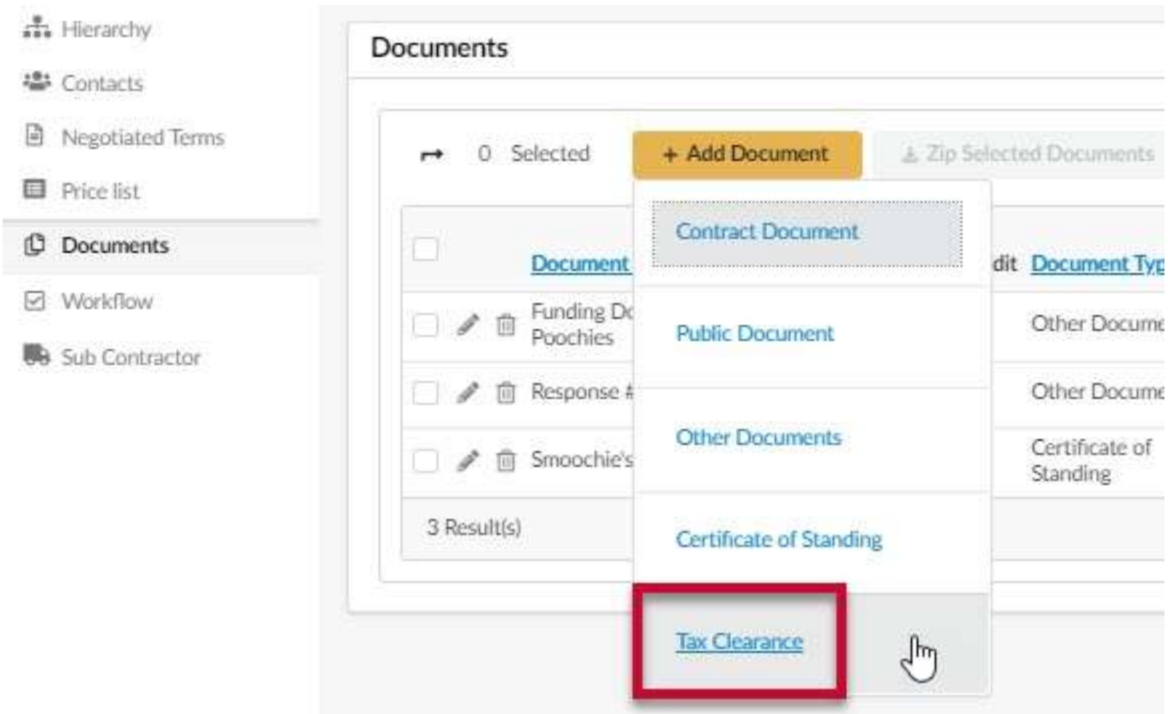


Figure 21: The Tax Clearance option in the + Add Document drop-down menu.

22. Enter the appropriate information in the respective fields. A red asterisk (*) indicates a required field.

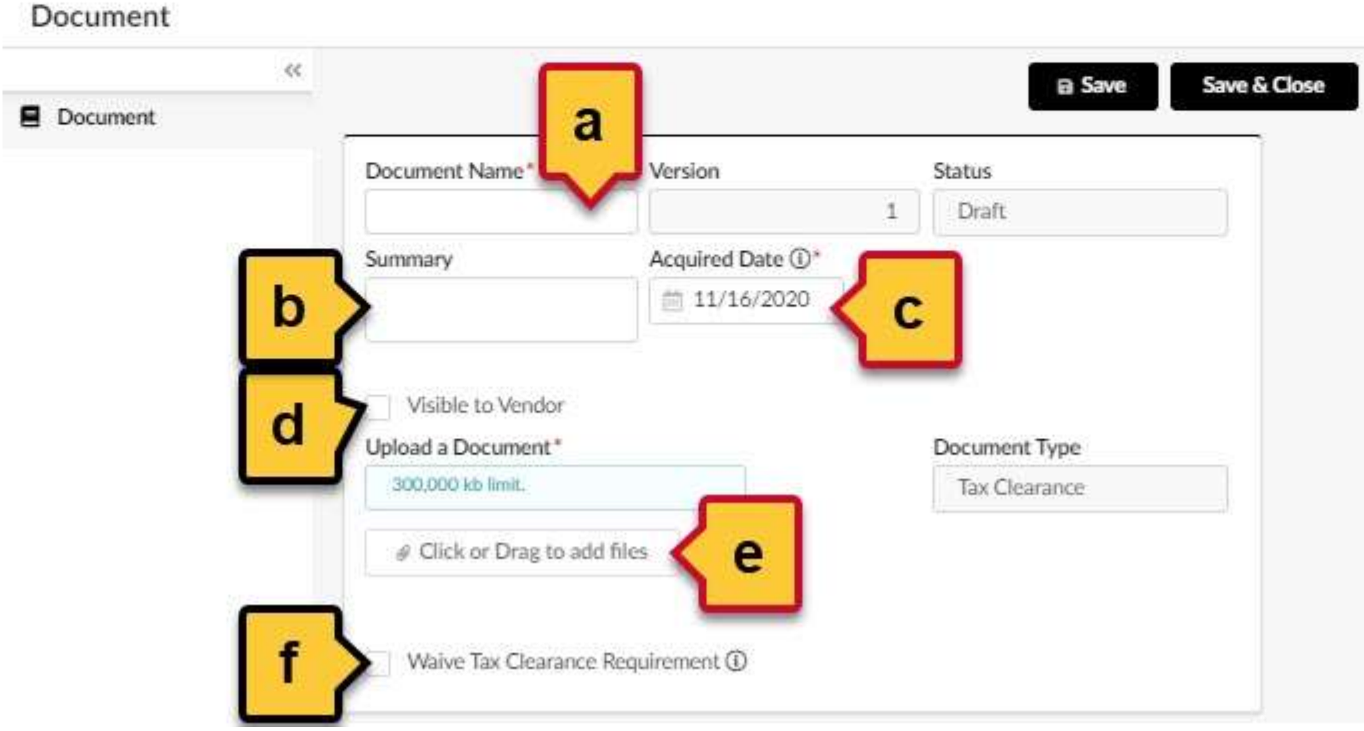


Figure 22: The form fields for a Tax Clearance document in the Document window.

a. **Document Name (*):** Enter a name for the document in this field.
b. **Summary:** Enter a brief summary of the document in this field.
c. **Acquired Date (*):** This date auto-populates with today's date. Click this field to select a different date.
d. **Visible to Vendor:** You must select this checkbox if you want Vendors to be able to view this document.
e. **Click or Drag to add files (*)** button**:** Click this button to browse your device for a file or drag a file to this button to add it.

   NOTE: Uploaded files cannot exceed 300,000 KB.

   NOTE: You cannot directly edit documents in eMMA, but you can upload new versions.

f. **Waive Certificate of Standing Requirement:** Select this checkbox to waive the certificate of standing requirement.
   i. If you select this checkbox, the **Reason for Waiver Request (*)** field displays. Enter the reason for waiving this requirement.

23. Click the **Save & Close** button in the Document pop-up window. The document displays on the Documents page.

24. Click the **In Good Standing** button to the right of the Tax Clearance document you added.

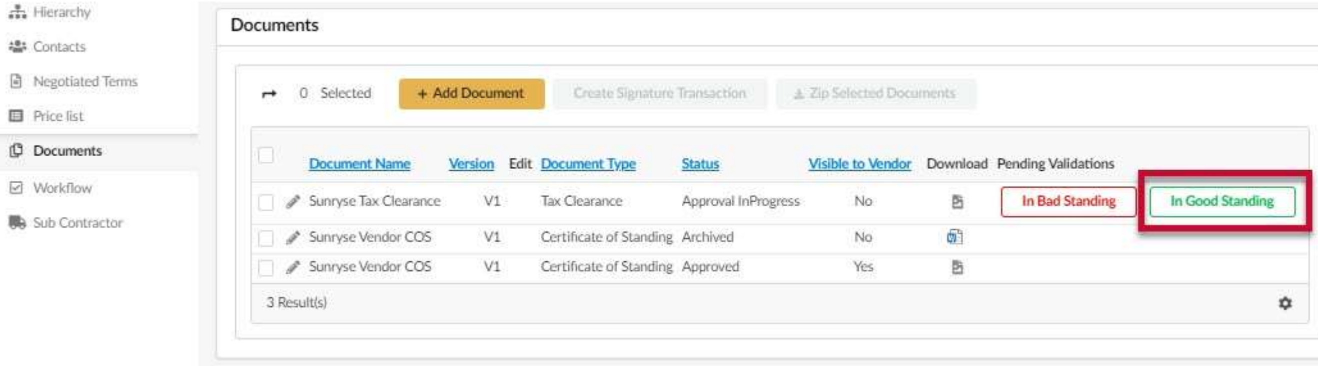
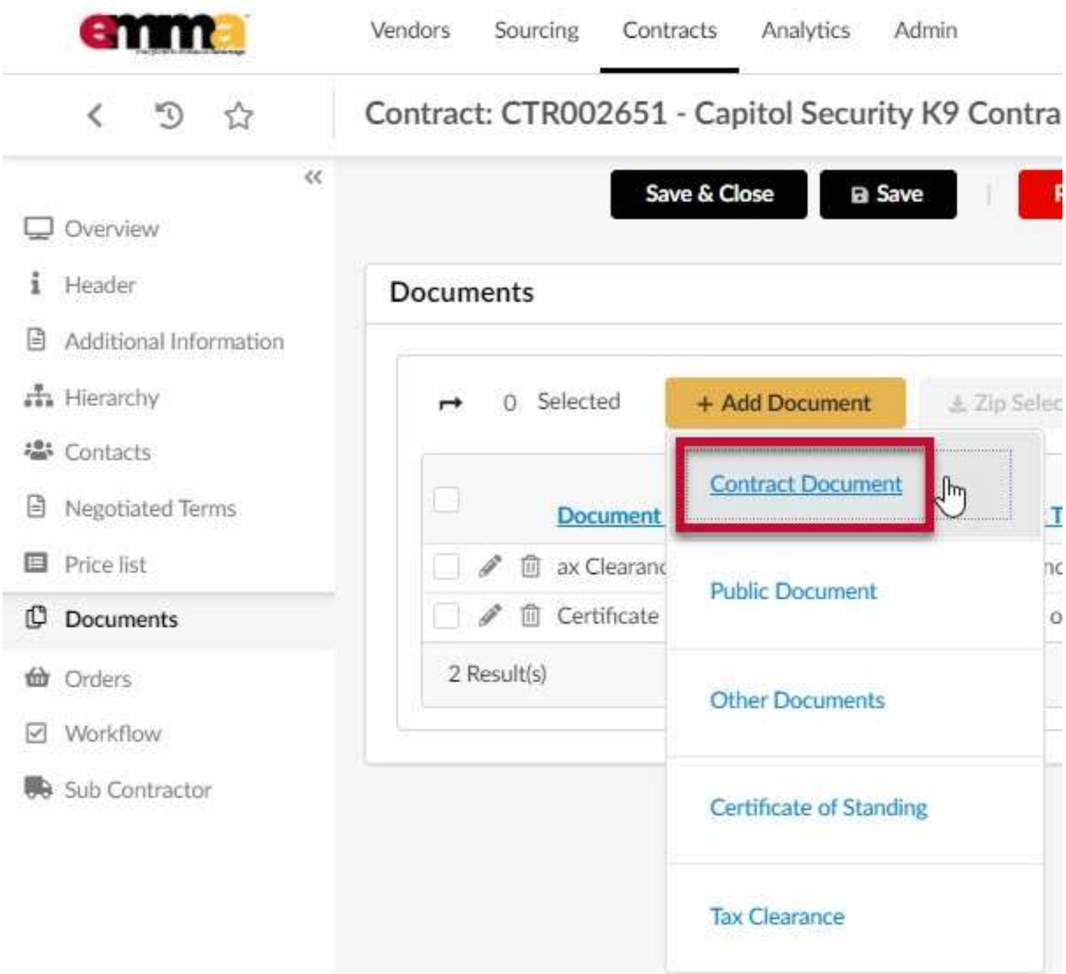
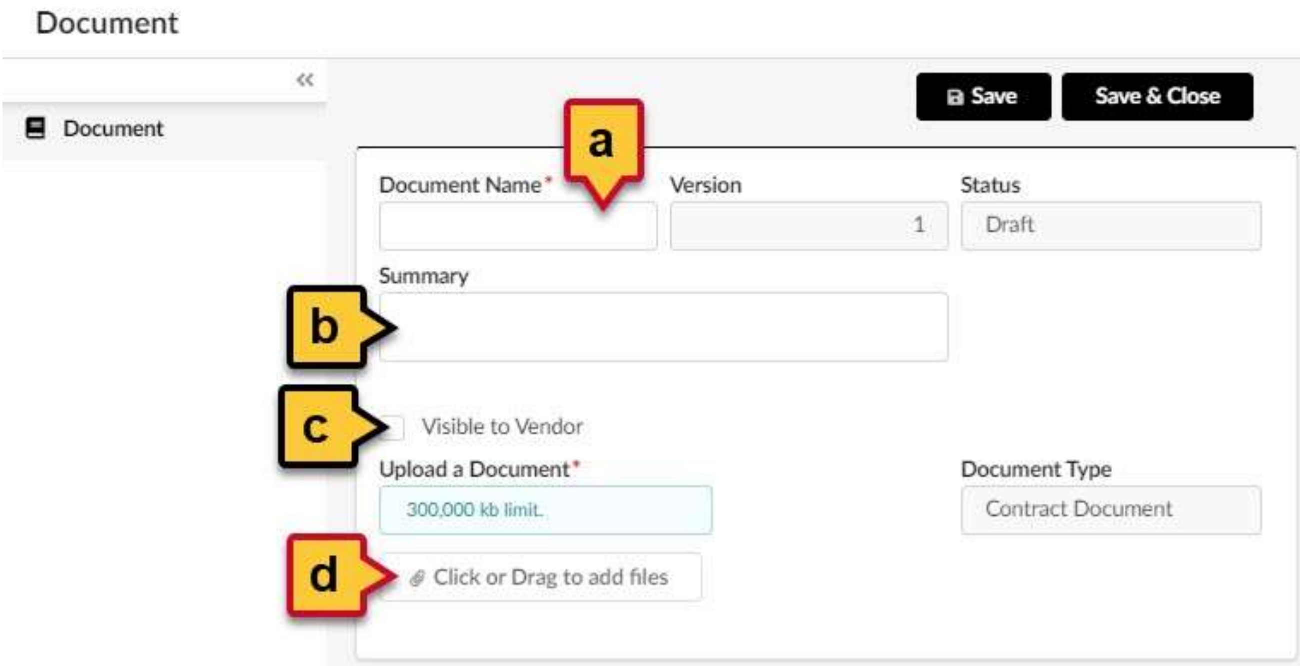


Figure 23: The In Good Standing button to the right of a Tax Clearance document added to a contract.

25. Click the **Save** button at the top of the Documents page.
26. Click the + **Add Document** button to open the drop-down menu and select the **Contract Document** option.



27. Enter the appropriate information in the respective fields. A red asterisk (*) indicates a required field.



28. Click the **Save & Close** button in the Document pop-up window. The document displays on the Documents page.

IMPORTANT!! DO NOT click the Finalize by PO button until you have all signatures you need and no more changes to make to the Contract Document.

29. Click the **Workflow** tab on the left-hand side-panel and click the **Launch Workflow** button at the top of the Workflow page.

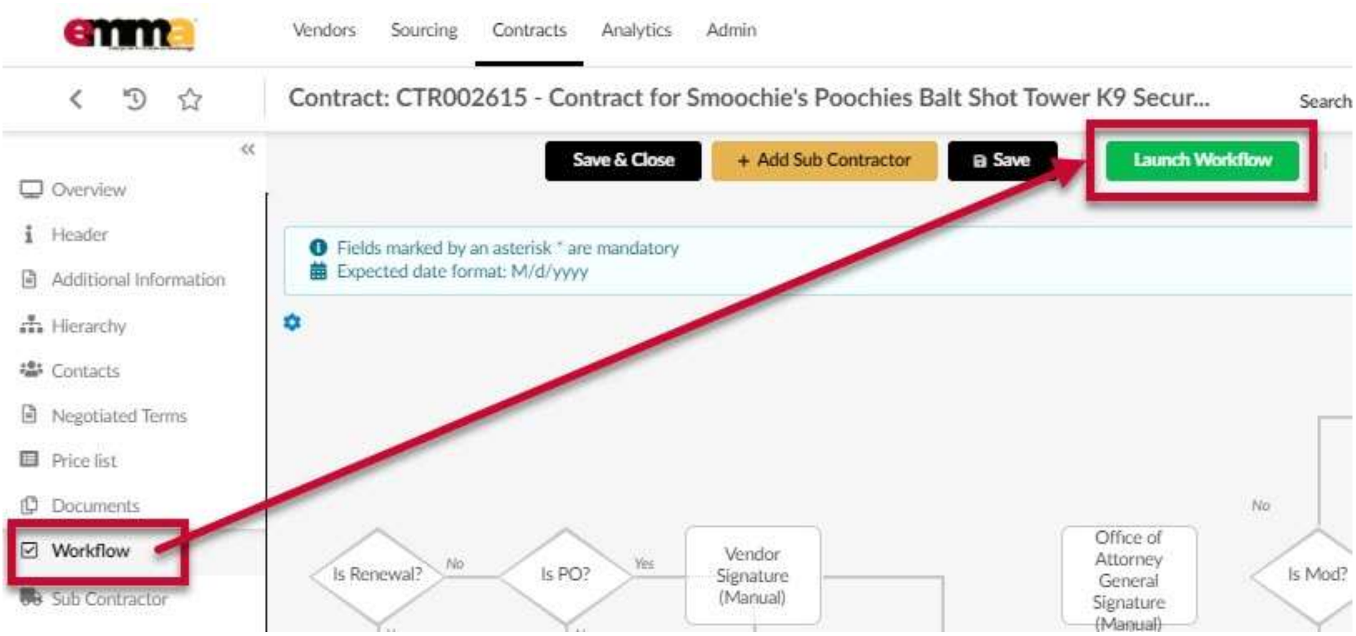


Figure 24: The Launch Workflow button in the Workflow tab.

NOTE: If at any point you see the workflow stopped at a point labeled **Signature Type?**, then the system needs to know how you want your contracts signed.

30. **NOTE:** These instructions explain the manual signing process. The word "manual" here refers to the process of obtaining a signature in ink and paper and/or otherwise outside the system. If you wish to use DocuSign, please check with your agency and see the QRG Using DocuSign in eMMA for DocuSign instructions.

    Click the green **Manual** button at the top of the Workflow page to obtain a signature manually. The Signature Type point turns green after you click it.

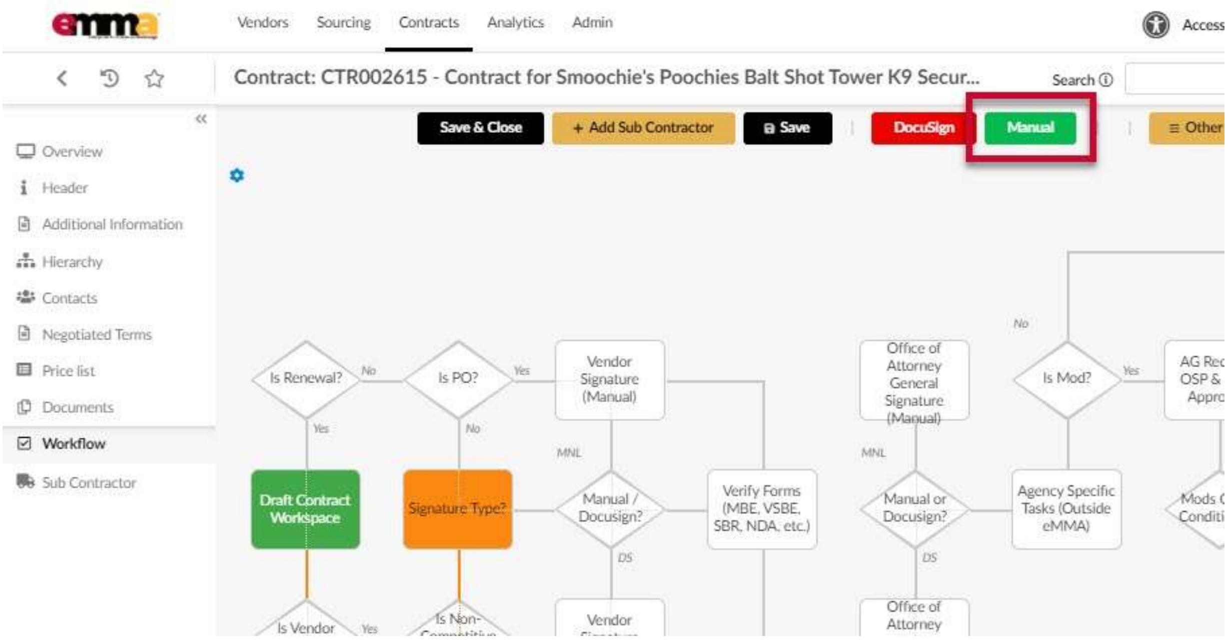


Figure 25: The Manual button on the Workflow page for manual signatures in eMMA.

31. Click **Save** at the top of the Workflow page. The Buyer must now separately seek required signatures on all documents. Vendors do not have the ability to upload or manipulate the Documents tab.

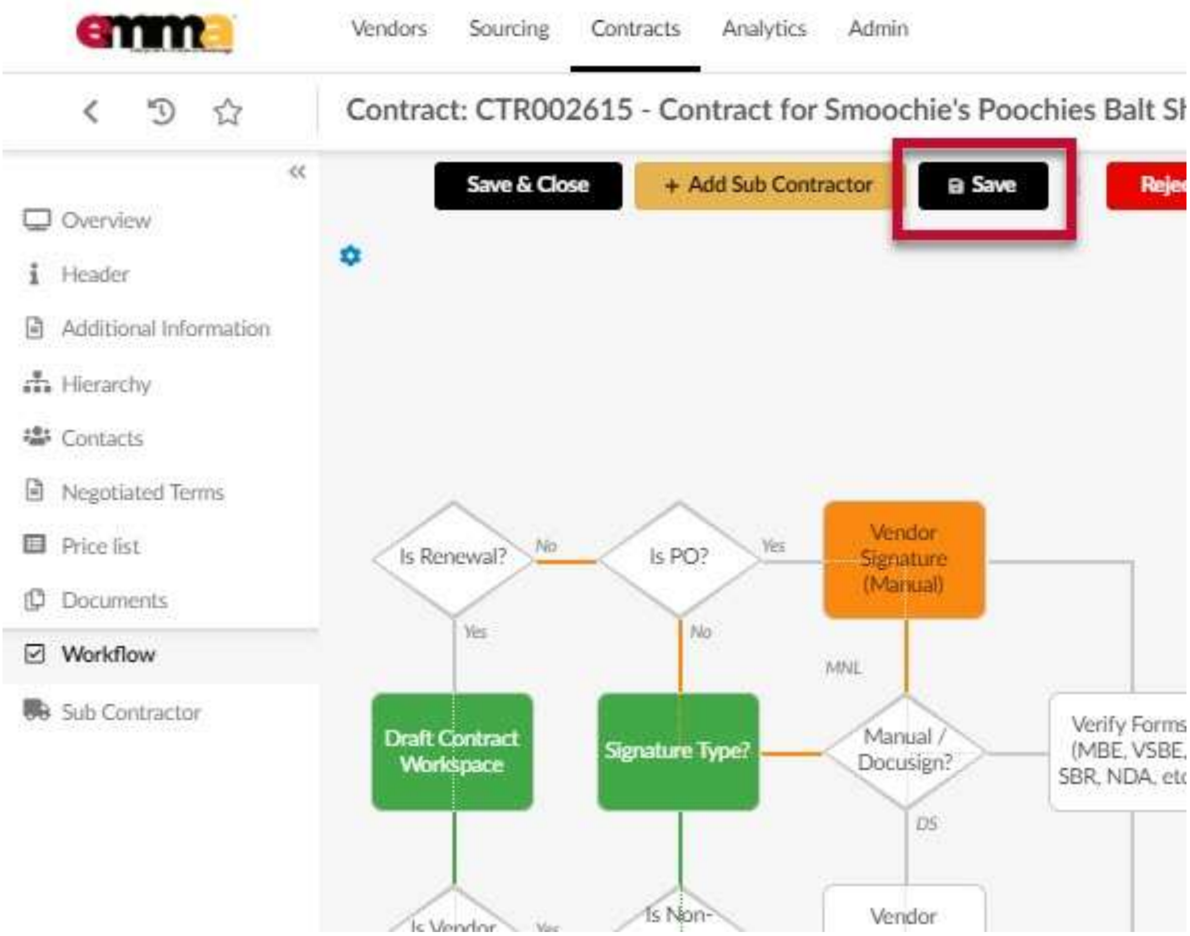


Figure 26: The Save button at the top of the Workflow page.

32. Once the Vendor has signed and returned all required document(s) to the PO, the Buyer must click the **Vendor Execute** button at the top of the screen to move the workflow process forward.

    NOTE: The Procurement Officer is responsible for moving the workflow through the process after each required signature is complete and at various points where required. They are also responsible for uploading the final Contract Document in eMMA. The Procurement Officer should be making Agency Specific Task Approvals and Form Verifications between each approval from the signatories.

33. Follow the workflow and make sure to complete the responsive responsibility checks for the vendor.
34. Once final signed copies of all contract document(s) are received, and all workflow approvals obtained, Buyers should ensure final versions are uploaded and finalized on the Documents tab. Click the pencil icon to the left of

the document to upload newest versions.

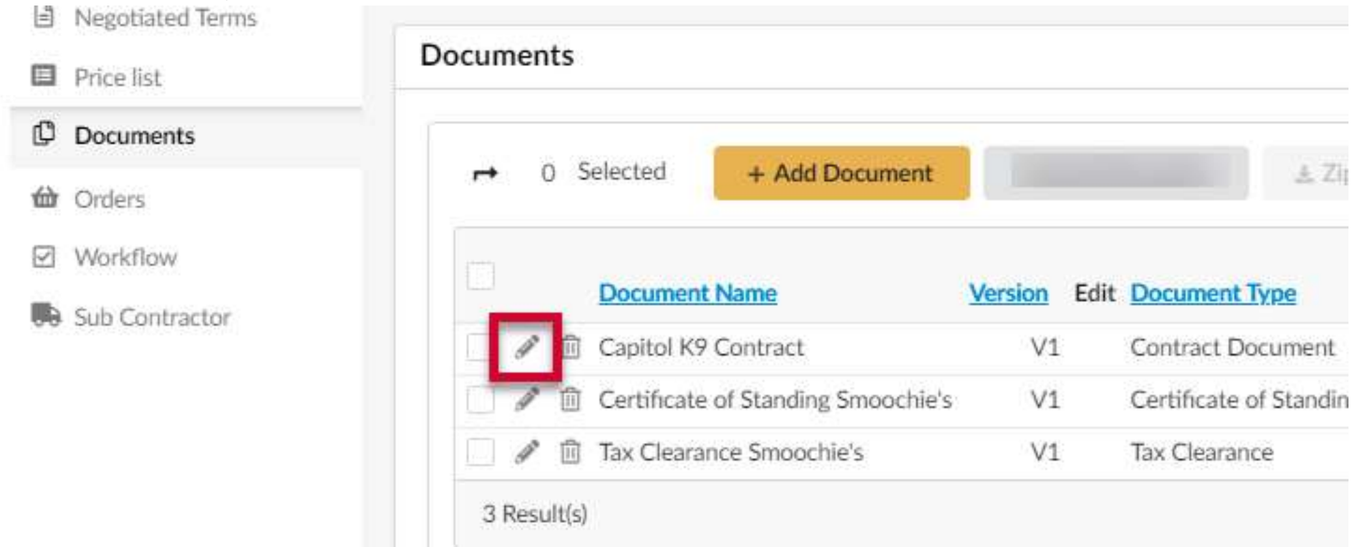


Figure 27: The Edit (pencil) icon to upload a new version of a document.

35. The Procurement Officer clicks **Documents** tab in the left-hand side-panel, and clicks the **Finalize by PO** button for the **Contract Document**.

IMPORTANT: Only click the Finalize by PO button if the document needs **no further changes or signatures**.

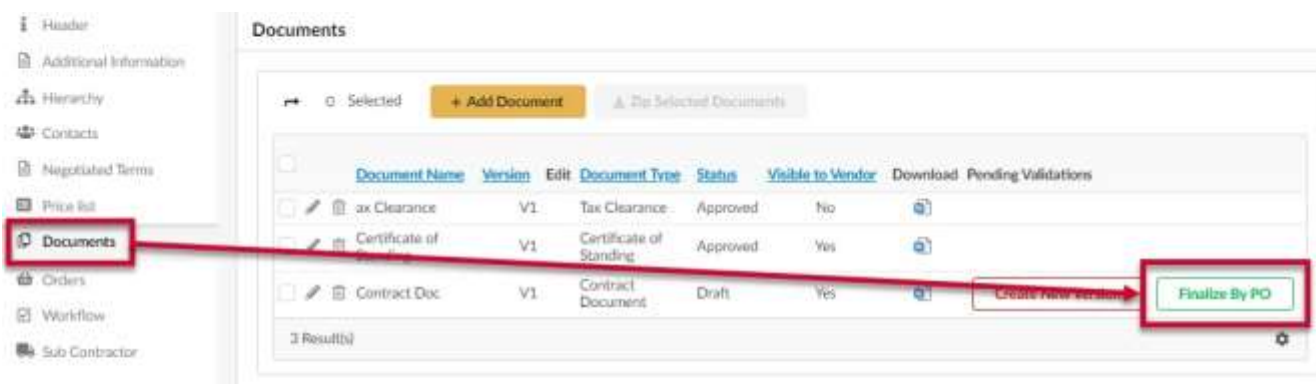


Figure 28: The Documents tab and the Finalize by PO button.

36. the Procurement Officer clicks the **Workflow** tab in the left-hand side panel and clicks the **Publish** button.

Figure 29: The Workflow tab and the Publish button.

Workflow Page Features

Approval History

Below the workflow, the Approval History logs the progression of the workflow.

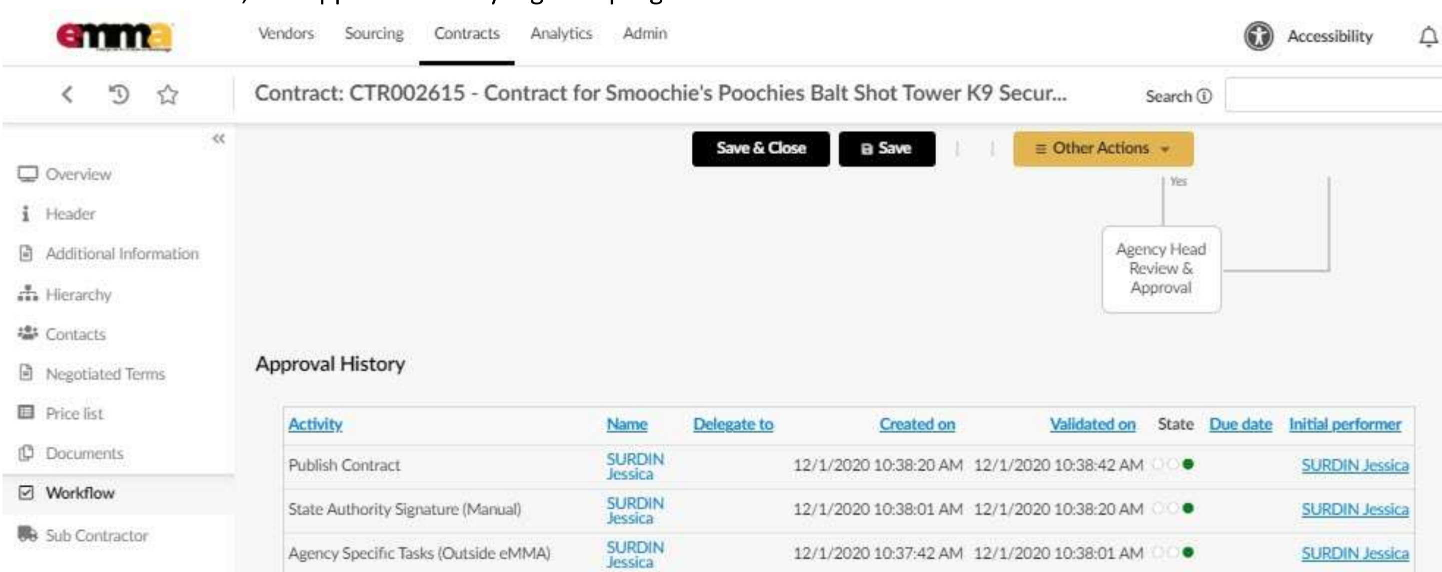


Figure 30: The Approval History section for the Contract workflow.

This section shows:

- **Activity:** The applicable workflow step.

- **Name:** The user who is eligible to perform that step and has been notified by the system to validate the task.
- **Delegate to** (if applicable)**:** To whom the task was delegated.
- **Created on:** When the task was initiated.
- **Validated on:** When the task was completed.
- **State:** The state of the task is shown in the three circles in this column; red indicates a rejection, orange indicates the action still pending, green indicates a completed task.
- **Due Date** (if applicable)**:** The date the task was due.
- **Initial Performer:** The user who completed the workflow task.

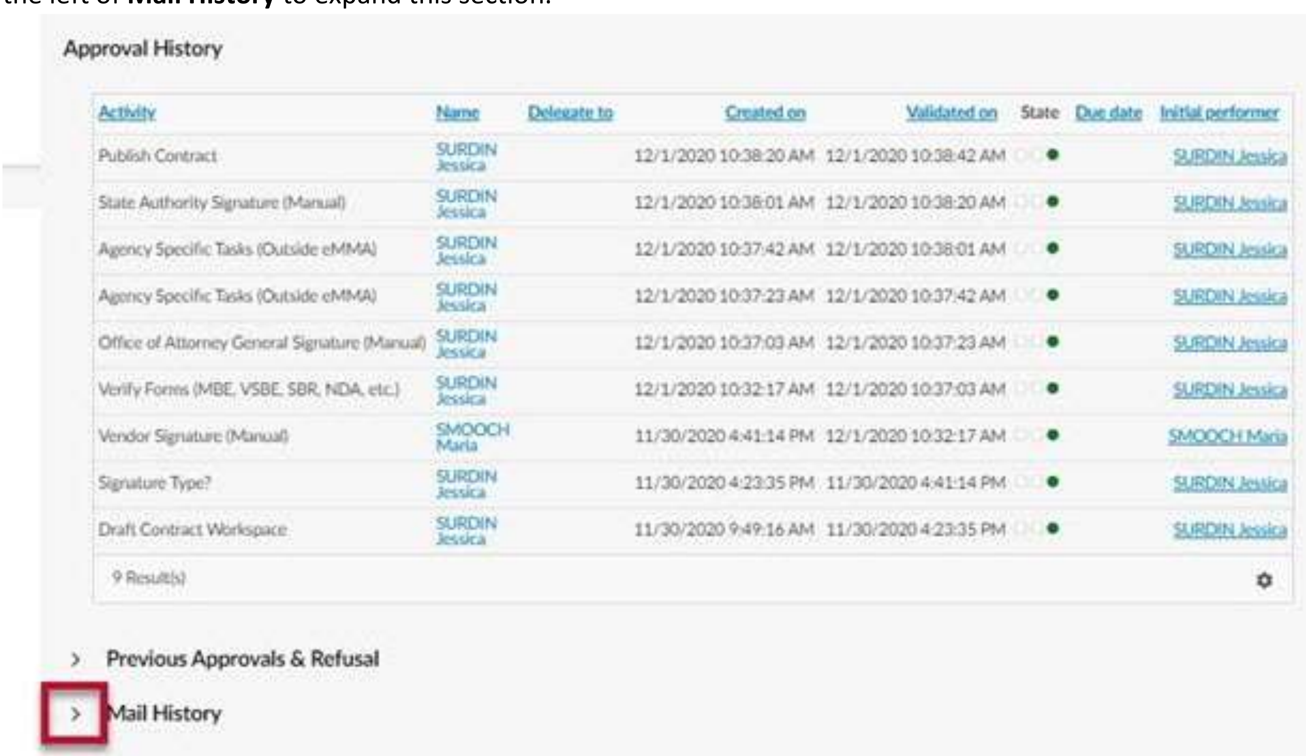
Previous Approvals and Refusals

Click the chevron (arrow) to the left of **Previous Approvals and Refusals**. This section shows any previous approvals and refusals this contract might have gone through before the current workflow.

The system generates email notifications that go out as the workflow moves through the approval process. These let you and others know what the next step is. You can view this at any time in the Contract process.

Mail History

In the Workflow tab of the contract, scroll below the workflow and Approval History. Click the chevron (arrow) to the left of **Mail History** to expand this section.


Approval History

Activity	Name	Delegate to	Created on	Validated on	State	Due date	Initial performer
Publish Contract	SURDIN Jessica		12/1/2020 10:38:20 AM	12/1/2020 10:38:42 AM			SURDIN Jessica
State Authority Signature (Manual)	SURDIN Jessica		12/1/2020 10:38:01 AM	12/1/2020 10:38:20 AM			SURDIN Jessica
Agency Specific Tasks (Outside eMMA)	SURDIN Jessica		12/1/2020 10:37:42 AM	12/1/2020 10:38:01 AM			SURDIN Jessica
Agency Specific Tasks (Outside eMMA)	SURDIN Jessica		12/1/2020 10:37:23 AM	12/1/2020 10:37:42 AM			SURDIN Jessica
Office of Attorney General Signature (Manual)	SURDIN Jessica		12/1/2020 10:37:03 AM	12/1/2020 10:37:23 AM			SURDIN Jessica
Verify Forms (MBE, VSBE, SBR, NDA, etc.)	SURDIN Jessica		12/1/2020 10:32:17 AM	12/1/2020 10:37:03 AM			SURDIN Jessica
Vendor Signature (Manual)	SMOOCH Maria		11/30/2020 4:41:14 PM	12/1/2020 10:32:17 AM			SMOOCH Maria
Signature Type?	SURDIN Jessica		11/30/2020 4:23:35 PM	11/30/2020 4:41:14 PM			SURDIN Jessica
Draft Contract Workspace	SURDIN Jessica		11/30/2020 9:49:16 AM	11/30/2020 4:23:35 PM			SURDIN Jessica

9 Result(s)

Previous Approvals & Refusal

Mail History

Figure 31: The Mail History section chevron (arrow).

This section shows each sent email from the eMMA system as well as who sent it and the date and time when it was sent. Click on the hyperlink in the **Subject** column to open a new window and see the email content.

Figure 32: The Mail History section for a contract workflow.