Create an Emergency Sourcing Project and Contract in eMMA

Quick Reference Guide

Overview

This Quick Reference Guide (QRG) is intended for Buyers who need to create a COVID-19 relevant Request for Information (RFI) in the eMaryland Marketplace Advantage (eMMA). It shows you how to create an Invitation for Bid (IFB) solicitation from beginning to end. IFBs typically involve solicitations worth over $50,000, and involve purchasing commodities, capital equipment, and construction work.

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

This QRG is broken down into six sections:

- Create an Emergency Sourcing Project
- Add Team Members
- Add Consulted Vendors
- Add Documents
- Workflow
- Create an Emergency Contract

Step-by-Step Instructions

Create an Emergency Sourcing Project

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 **Create Project** from the drop-down menu that opens.

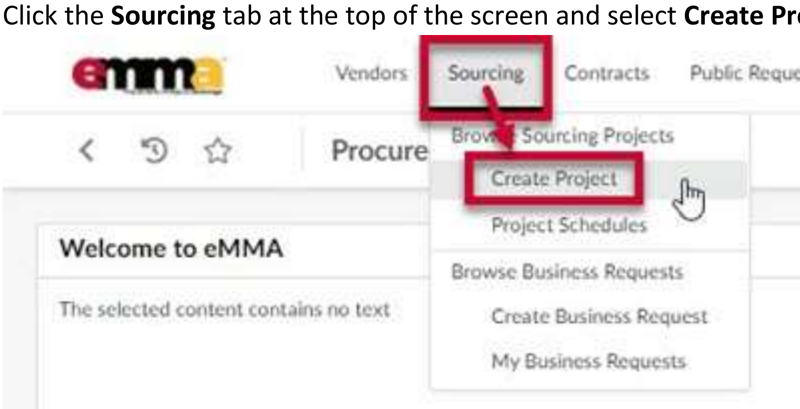


Figure 1: The Sourcing tab and the Create Project option in the drop-down menu.

3. Enter information in the **General Information** section of the form. A red asterisk (*) indicates a required field. The diagram below shows required fields described in more detail below.

   NOTE: Additional fields may display depending on your selections.

Figure 2: The General Information section and fields for creating a Sourcing Project in eMMA.

   a. **Alternate ID:** This field is an additional identifier. If you have a Financial Management Information System (FMIS) number or an internal contract number, enter it here. If not, then skip this field.
   b. **Is a template** (checkbox)**:** Click this checkbox if you plan to make this sourcing project a template for other projects.
   c. **Project Type (*):** Click this field to open the drop-down menu and select the **Emergency** project type.
   d. **Project Start Date (*):** This field auto-populates with today's date. Click this field to select a date if you need to change it.
   e. **Linked Business Requests:** If you need to link a Business Request to your new sourcing project, click this field to open the drop-down menu and select the **See All** option. Use the search fields to search for your Business Request and click the checkbox to the left of the request to select it. The Business Request populates in this field.

f. **Project Title (*):** Enter a title for your Emergency Project in this field.

g. **Project End Date:** Click this field to select a date if you know when your project will end.

h. **Main Category (*):** Click this field to open the drop-down menu and select one main category for your project or click **See All** at the bottom of the menu.

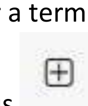
   NOTE: Clicking **See All** opens a window in which all categories are listed. Search for a term in the **Keywords** field and click the **Search** button to return relevant results. Select a category from this list and close the window. The category auto-populates in the field.

i. **Other Commodities:** Click this field to open the drop-down menu and select one or more additional categories for your project or click **See All** at the bottom of the menu. Selecting more commodities means you will get a broader scope of responses from vendors who can meet your project's needs.

   NOTE: Clicking **See All** opens a window in which all commodities are listed. Search for a term in the **Keywords** field and click the **Search** button to return relevant results. Use the plus  and minus  icons to the left of the commodity groups to expand and collapse them. It is imperative that you select as many and as detailed commodities as applies to your project. This ensures vendors from a wide range of commodities can find and bid on your solicitation. Select one or more commodity(ies) from this list and close the window. The commodity(ies) auto-populates in the field.

j. **Initial Funds Certification Availability:** This field is system-generated. You do not need to do anything here.

k. **Issuing Agency/Sub-Agency/Site (*):** Click this field to open the drop-down menu and select appropriate Issuing Agency/Sub-Agency/Site for this project or click the **See All** option at the bottom of the menu.

   NOTE: Clicking **See All** opens a window in which all agencies are listed. Search for a term in the **Keywords** field and click the **Search** button to return relevant results. Use the plus  and minus  icons to the left of the agency groups to expand and collapse them. Click the checkbox to the left of the agency to select it. The selected agency auto-populates in the field.

l. **Other Organizations:** Click this field to open the drop-down menu and select one or more additional organizations related to your project or click the **See All** option at the bottom of the menu.

   NOTE: Clicking **See All** opens a window in which all organizations are listed. Search for a term in the **Keywords** field and click the **Search** button to return relevant results. Select one or more organization(s) from this list and close the window. The organization(s) auto-populates in the field.

m. **MITDP Award?** (checkbox)**:** Click this checkbox **only** if you have a Major IT Development Project Award.

n. **Procurement Officer/Buyer (*):** This field auto-populates with your information. If this information is incorrect or needs to be changed, click this field to open the drop-down menu and select an option from the list. Click **See All** at the bottom of the menu to search through a list of all Procurement Officers/Buyers.

NOTE: Clicking **See All** opens a window in which all Procurement Officers are listed. Search for a term in the **Keywords** field and click the **Search** button to return relevant results. Select a name from this list. The selected Procurement Officer/Buyer auto-populates in the field.

4. Enter information in the **Additional Information** section below the General Information section. A red asterisk (*) indicates a required field. The diagram below shows required fields described in more detail below.

NOTE: Additional fields may display depending on your selections.

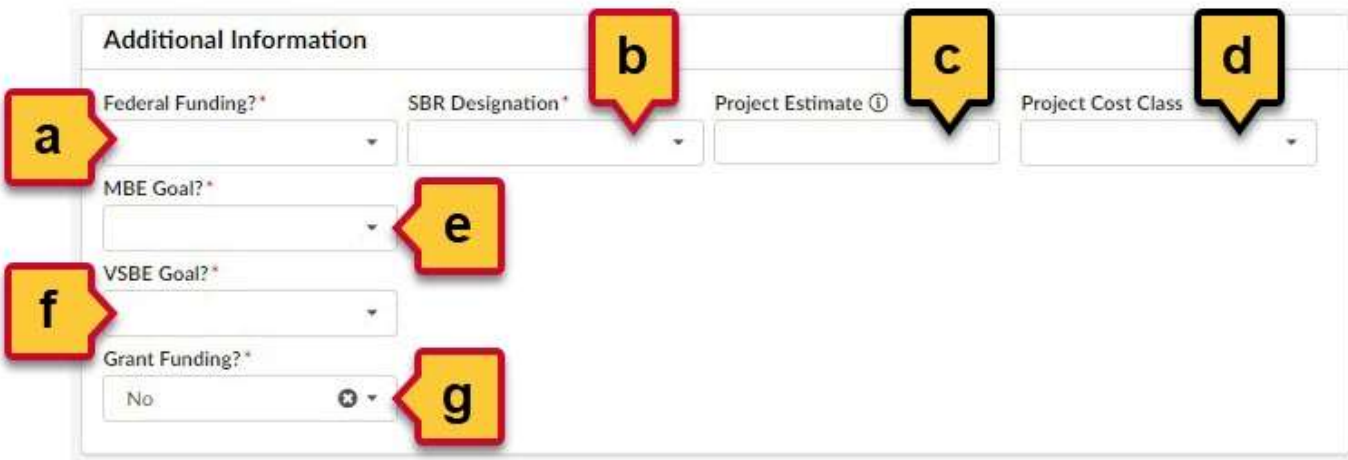


Figure 3: The Additional Information section and fields for creating a Sourcing Project in eMMA.

a. **Federal Funding? (*):** Does your project have federal funding? Click this field and select **Yes** or **No**.
b. **SBR Designation (*):** Does your project have a Small Business Reserve (SBR) designation? Click this field and select **Yes** or **No**.
c. **Project Estimate:** If you have an estimate of your project cost, enter it in this field.
d. **Project Cost Class:** Click this field and select a cost class for your project.
e. **MBE Goal? (*):** Does your project have a Minority-Owned Business Enterprise (MBE) goal? Click this field and select **Yes** or **No**.
    i. If you select **Yes**, two more fields display.
        1. **MBE Participation (%):** Enter the percentage for your MBE goal in this field.
        2. **MBE Sub-Goal?:** Does your project have MBE sub-goals? Click this field and select **Yes** or **No**.

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

Figure 4: The MBE sub-goal fields.

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 (%)

f. **VSBE Goal? (*):** Does your project have a Veteran-Owned Small Business Enterprise (VSBE) goal? Click this field and select **Yes** or **No**.
   i. If you select **Yes**, one more field displays.
      1. **VSBE Percentage (%);** Enter the percentage for your VSBE goal in this field.

g. **Grant Funding? (*):** Does your project have grant funding? Click this field and select **Yes** or **No**.
   i. If you select **Yes**, one more field displays.
      1. **Grant Funding Amount ($) (*): Enter** the dollar amount for your grant funding.

5. Enter information in the **Apparent Awardee Approver Criteria** section below the Additional Information section. A red asterisk (*) indicates a required field. The diagram below shows required fields described in more detail below.

Figure 5: The Apparent Awardee Approval Criteria section and required fields to create a Sourcing Project in eMMA.

a. **Legal Approval? (*):** Does your project need Legal approval? Click this field and select **Yes** or **No**.
b. **Procurement Supervisor Approval? (*):** Does your project need Procurement Supervisor approval? Click this field and select **Yes** or **No**.

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

Add Team Members

This process continues from the last step in the previous process. It shows how to add team members to your Emergency sourcing project.

7. 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.

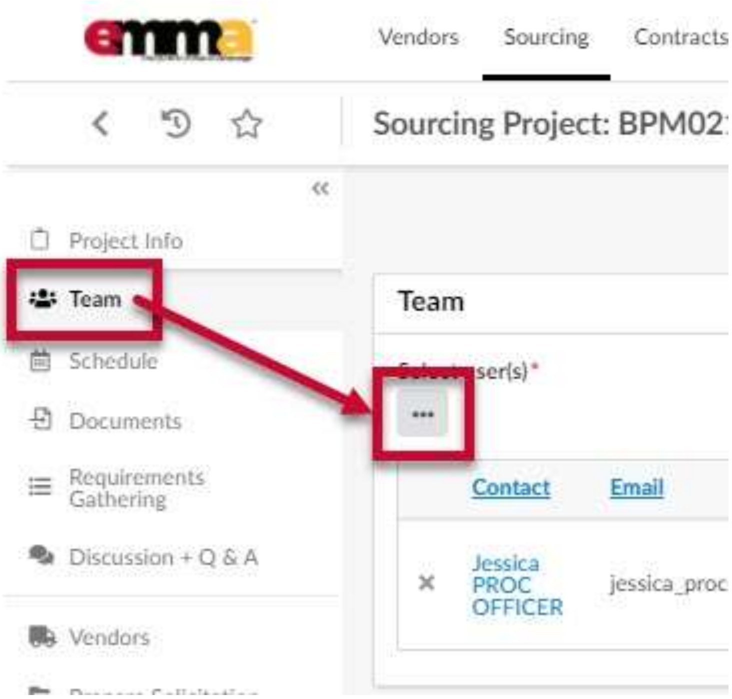


Figure 6: The Team Tab in the left-hand side-panel and the ellipsis (three dots) button.

8. 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.

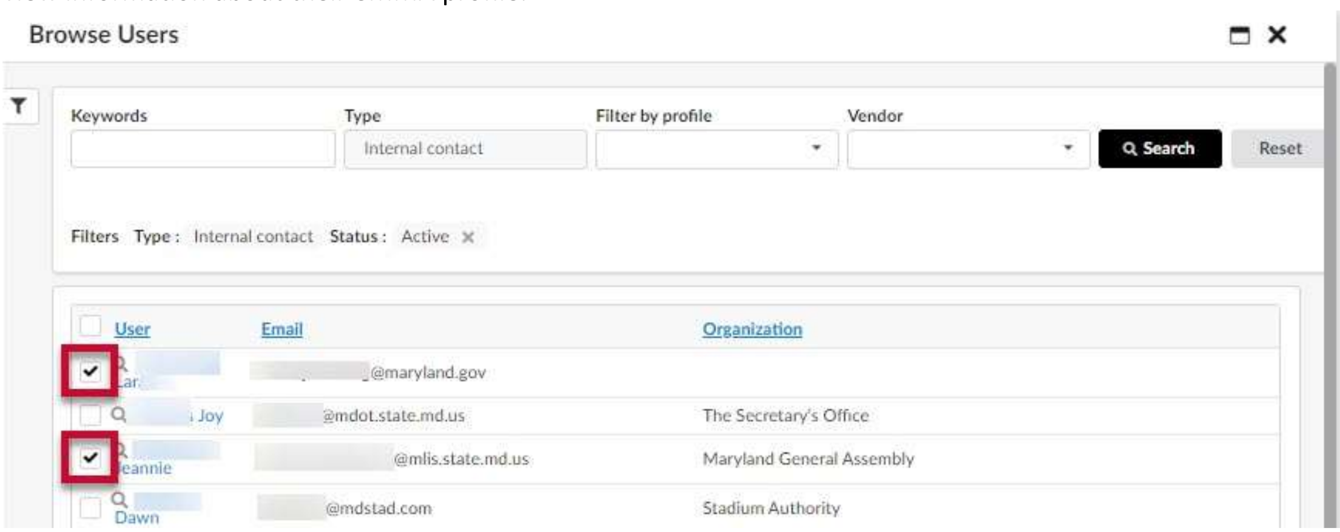


Figure 7: Two users selected in the Browse Users window.

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

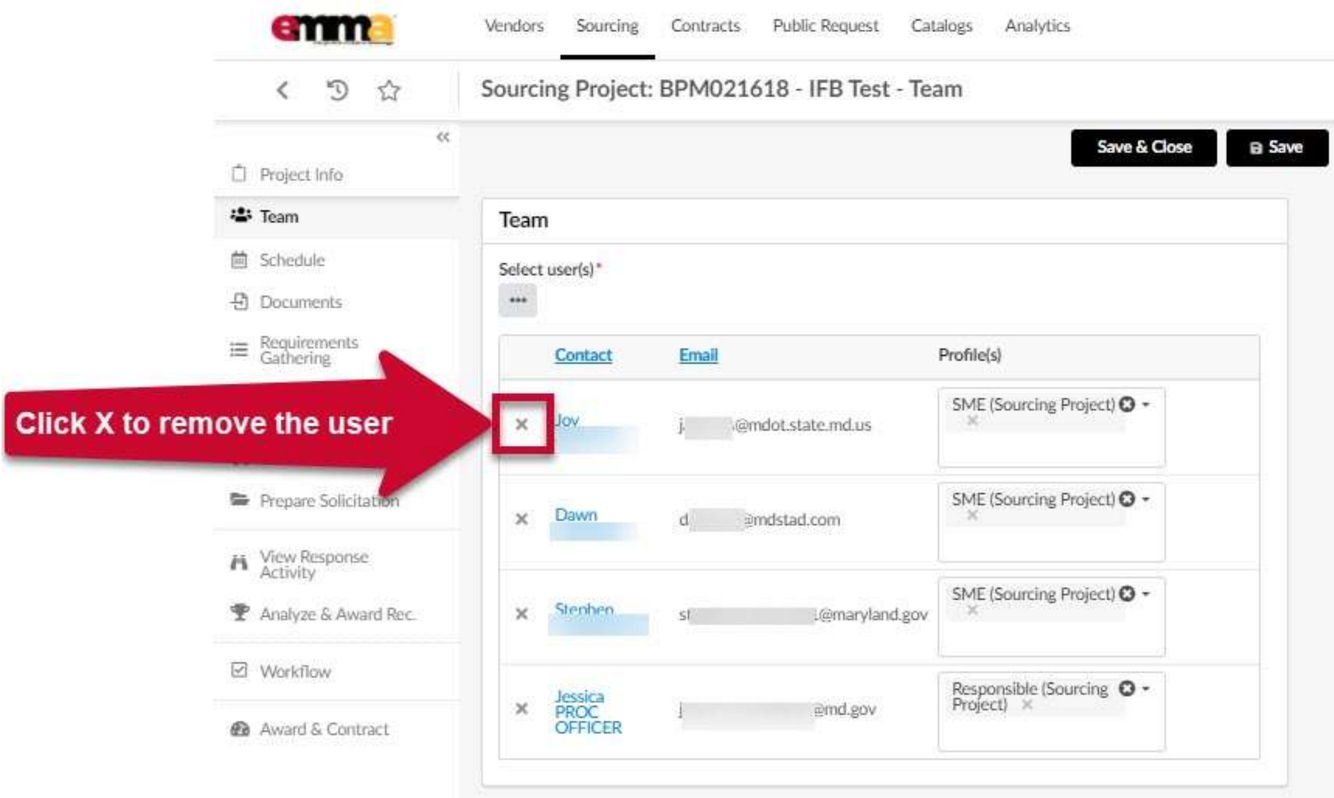


Figure 8: Users listed on the Team page and the X on the left to remove a user.

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

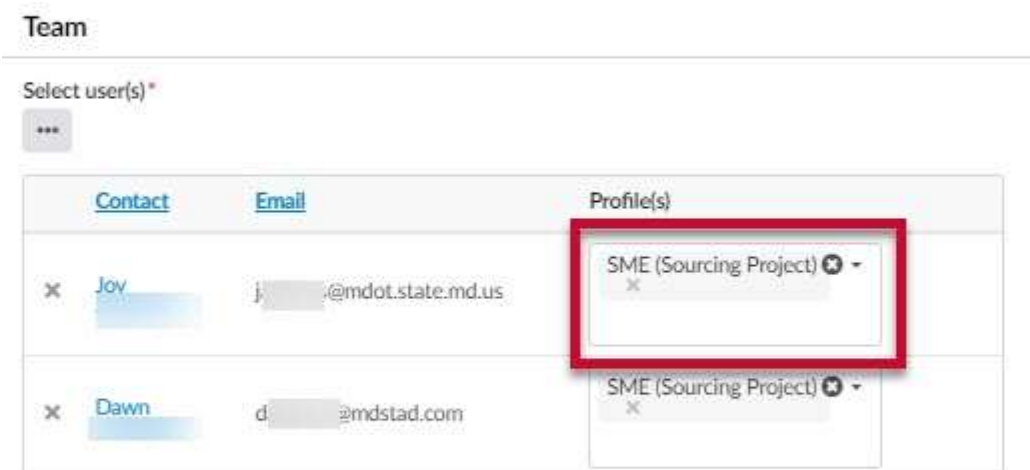


Figure 9: The Profile field to the right of a user's email.

11. 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.

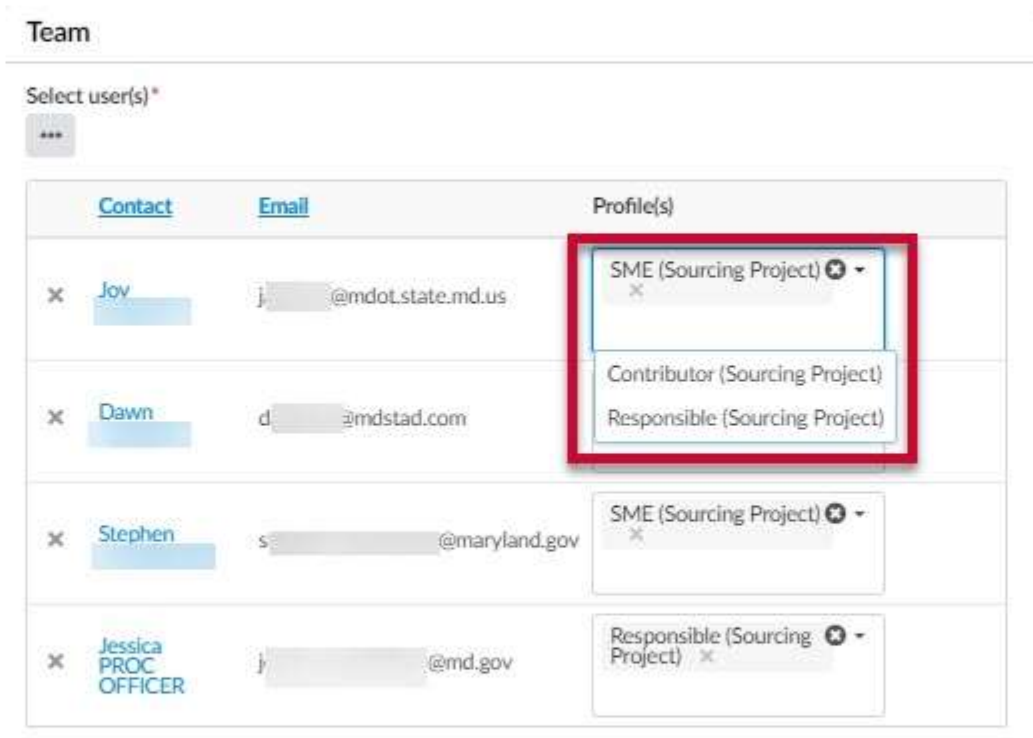


Figure 10: The drop-down menu to assign profile roles for a user in a Team.

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.

12. (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 11: The X to the right of a role to remove it from a user in a team.

13. 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.

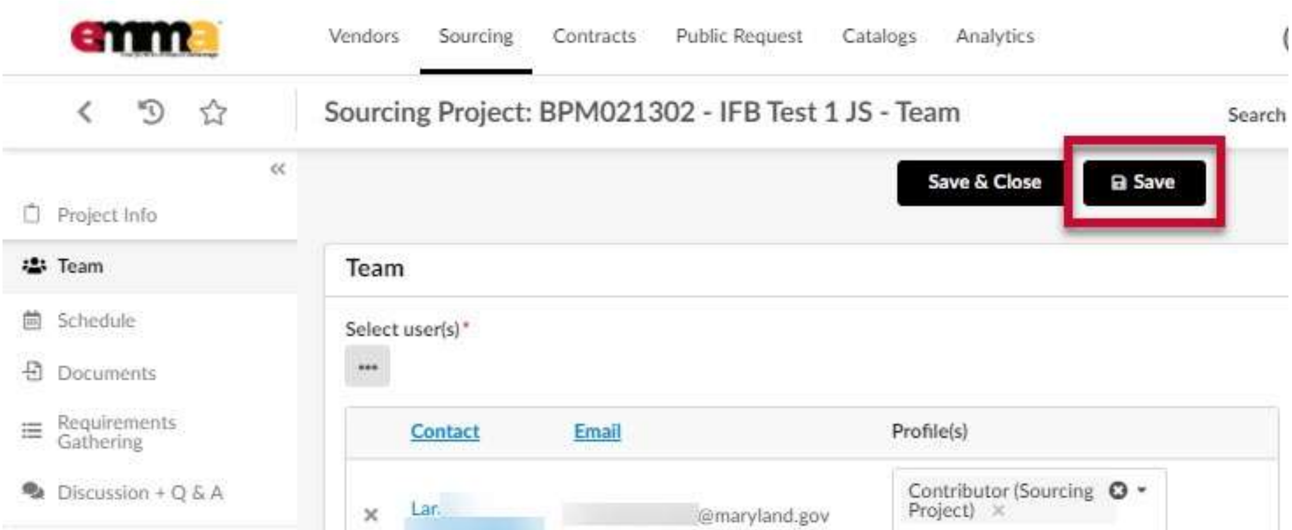


Figure 12: The Save button at the top of the Team page.

Add Consulted Vendor

This process continues from the last step in the previous process. It shows how to add the Vendor to which you intend to award your Emergency sourcing project.

14. Click the **Vendors** tab from the left-hand side-panel.

15. Click the ellipsis (three dots) button in the **Consulted Vendors** section. The **Browse Vendors** pop-up window opens and displays a list of Vendors based on the sourcing project's main commodity.

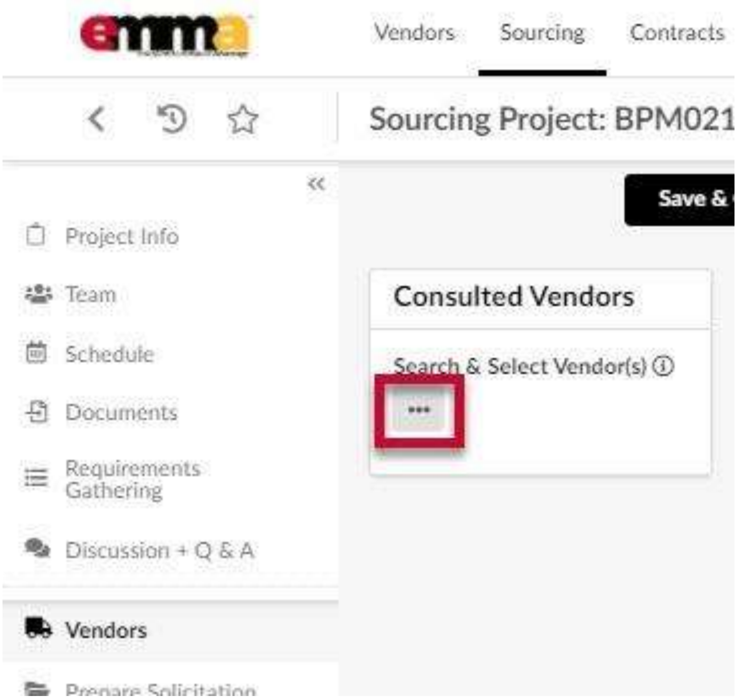


Figure 13: The ellipsis (three dots) icon in the Consulted Vendors section.

16. Find the specific Vendor that this Emergency contract is being/was awarded to by entering their name in the **Keywords** field. Remove filters below the Keywords field (click the X to the right of the filter) and then clicking the **Search** button.
    a. Select the checkbox to the left of the Vendor and close the Browse Vendors window. That Vendor displays on the Vendors page.
17. Close the **Browse Vendors** window. The Vendor will be listed in the Consulted Vendors section.
18. Click the **Save** button at the top of the page.

IMPORTANT: You must make sure you click the **Save** button or you will lose your progress to this point.

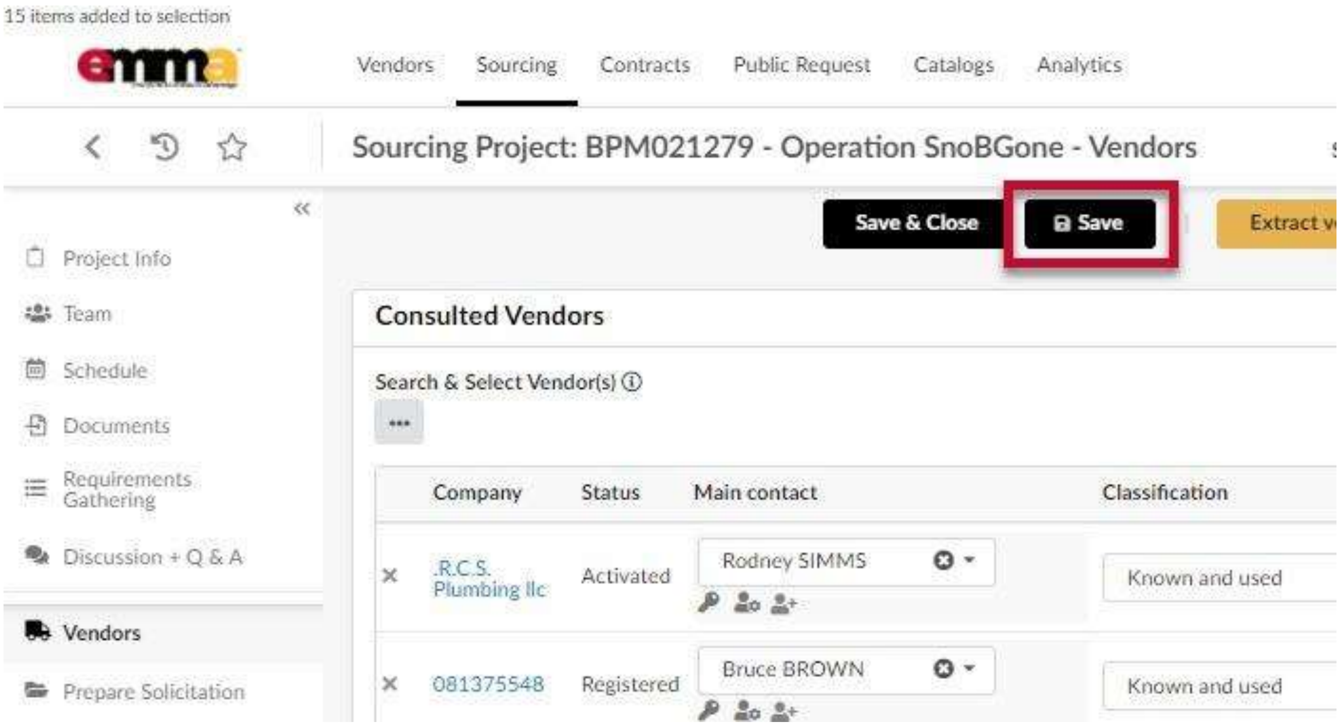


Figure 14: The Save button at the top of the page with added Vendors.

Add Documents

This process continues from the last step in the previous process. It shows how to upload documents to your sourcing project. This does not automatically add documents to your project solicitation, only the sourcing project folder.

19. 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.
20. Click the **Create Document** button in the **Sourcing Project Documents** pane. The Sourcing Project Documents pop-up window displays.

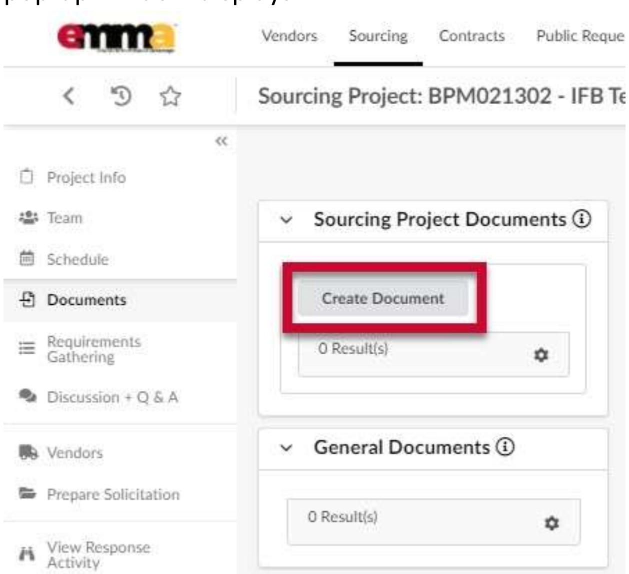


Figure 15: The Create Document button in the Sourcing Project Documents pane of the Documents tab.

21. Enter information in the form fields. A red asterisk (*) indicates a required field.

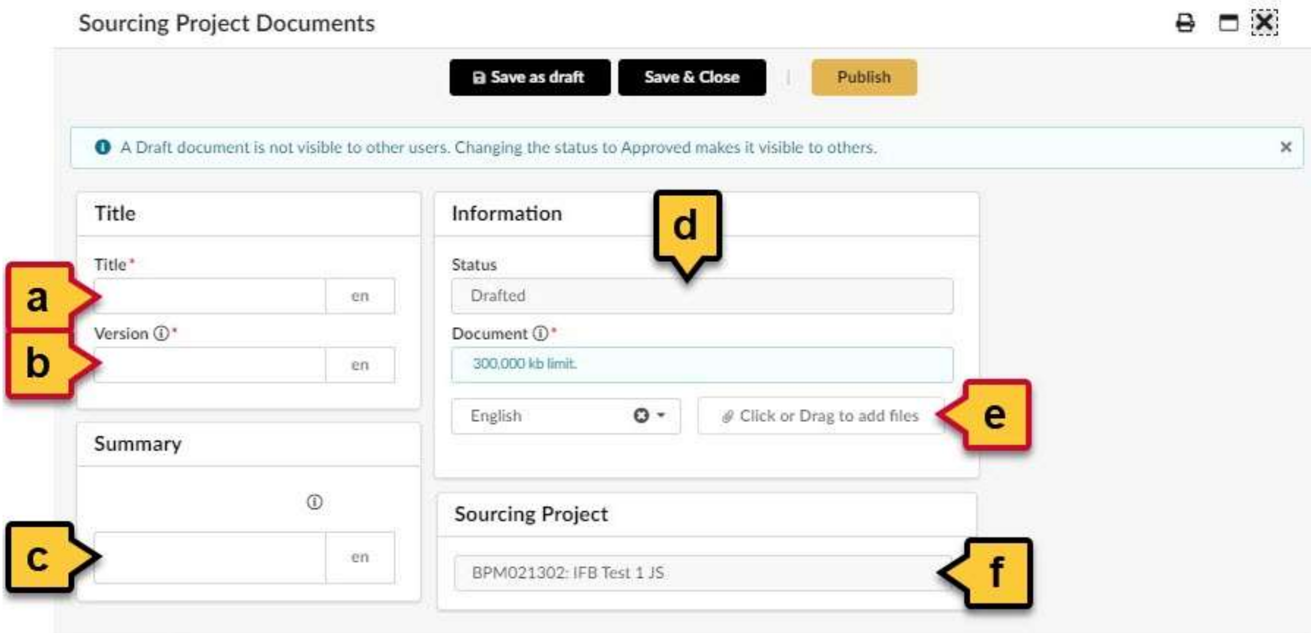


Figure 16: The Sourcing Project Documents window.

a. **Title (*):** Enter a title for the document.
b. **Version (*):** Enter a numeric value for the version of the document. The application will suggest the next version increment for each new revision.
c. **Summary:** Enter a brief summary of the document. Once you click this field, text editing options appear above it.
d. **Status:** This field shows the status of your document. No action is needed here.
e. **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.
f. **Sourcing Project:** This field indicates the sourcing project associated with this document. No action is needed here.

22. You have four options to move forward:

Figure 17: The Save and publish options for a document in Draft state.

a. **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 22c).

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.

23. 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.
24. 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.

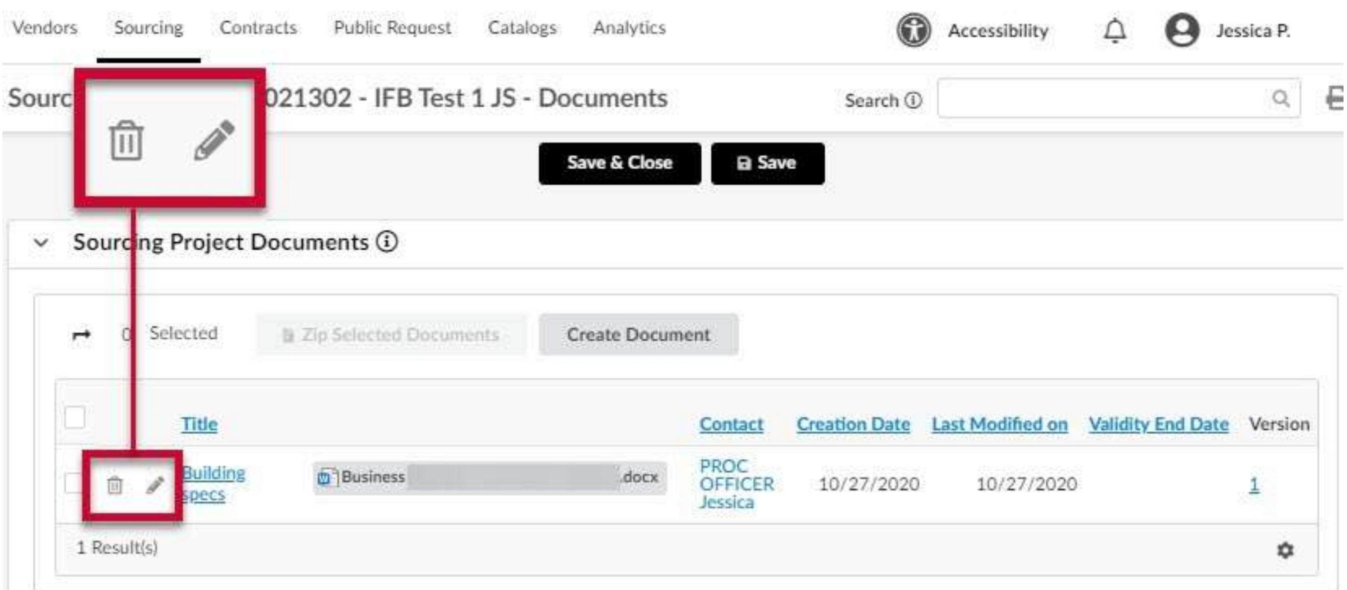


Figure 18: The added document for a sourcing project and a magnified view of the Delete and Edit icons.

25. (Optional) Click the Edit (pencil) icon to the left of the document Title to edit the document (upload a new version).
26. (Optional) Click the Delete (trashcan) icon to the left of the document Title to delete the document. Click the **Save** button at the top of the Documents page.

Workflow

This process continues from the last step in the previous process. It shows how to initiate the workflow for your sourcing project. Some agencies do not use workflows in their solicitations. Check with your supervisor to see if your agency is one that does or does not use them.

27. Click the **Workflow** tab in the left-hand side-panel to see the Workflow page for your project.

28. Click the **Launch Workflow** button at the top of the page. Any users who need to approve a point in the process are notified via email message and in eMMA. Once a point in the process is approved, the workflow moves directly to the next block and approver and notifies them via email and in eMMA.

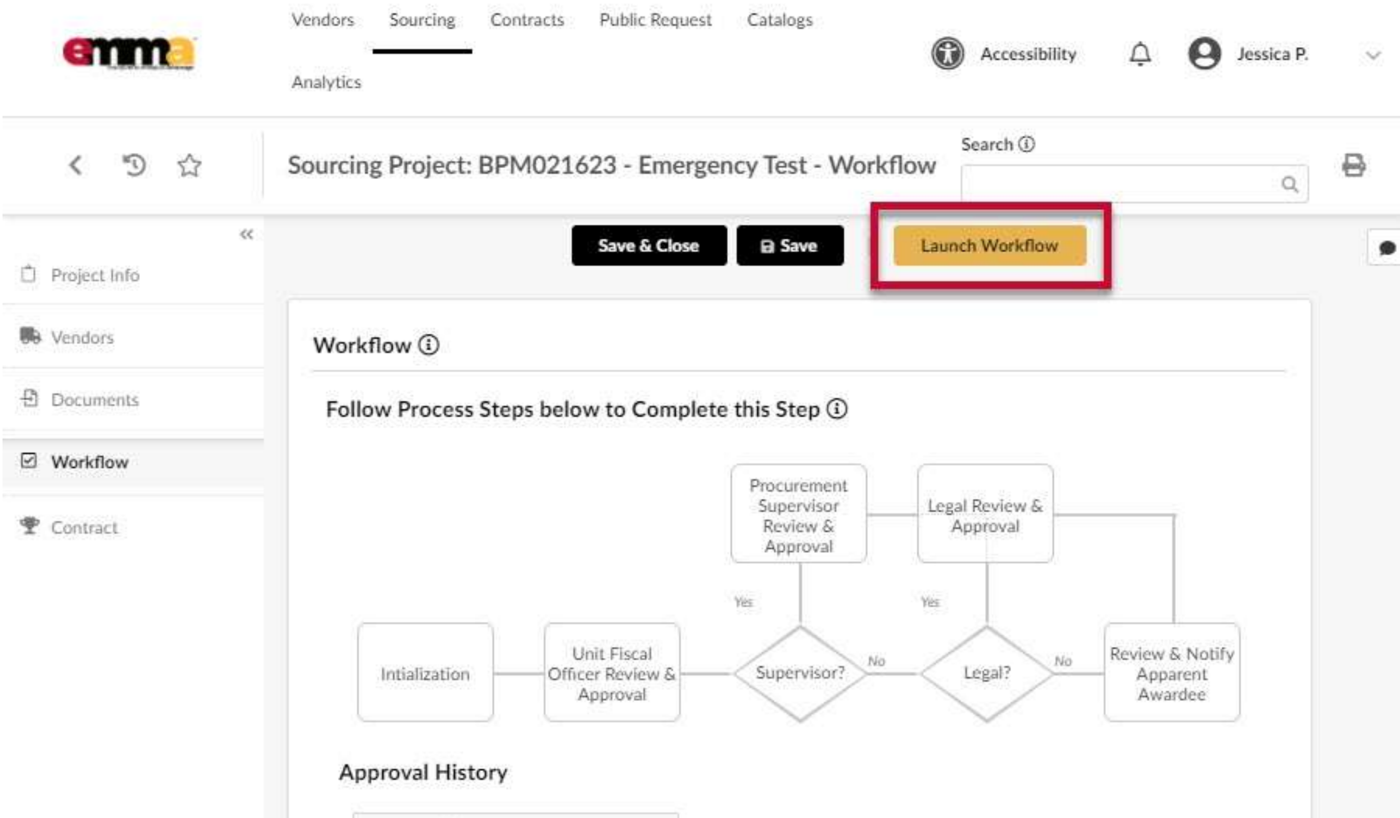


Figure 19: The Launch Workflow button on the Workflow page.

29. eMMA uses colors to indicate where your project is in the approval process. A green block indicates the task is approved and completed. An orange block indicates the project's present place in the process. Below the

workflow is a list of approvers for your project that shows when things were approved and by whom.

Figure 20: The Workflow approval process with both approved and incomplete parts of the process.

30. Click the **Save** button at the top of the Workflow page. The workflow will then take its course through the required steps and approvals.
31. When the project has gone through the Workflow, the final step for the Procurement Officer to complete is to Click the **Review & Notify Apparent Awardee** button. This sends an eMMA generated email to the vendor that you selected in the Vendors tab (per Step 16a) letting them know they are the Apparent Awardee of this Emergency contract.
32. When all is approved, you can begin creating a Contract for your Emergency Solicitation.

Create a Contract for an Emergency Solicitation

This process continues from the last step in the previous process. It shows how to create a contract for an Emergency Solicitation.

33. Navigate to your project if necessary and click the **Contract** tab on the left-hand side panel.

34. Click the **+ Add Contract** button at the top of the page. The Contract window opens. You may need to scroll horizontally to see all the options.

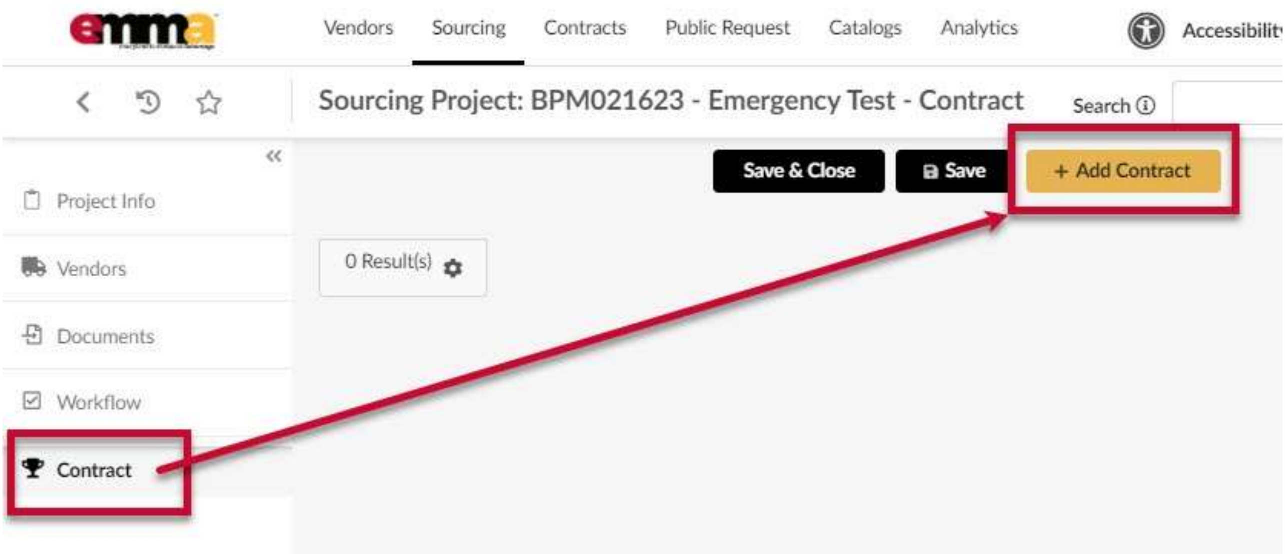


Figure 21: The Contract tab and the + Add Contract button.

35. Enter information in the Contract Header section. A red asterisk (*) indicates a mandatory field.

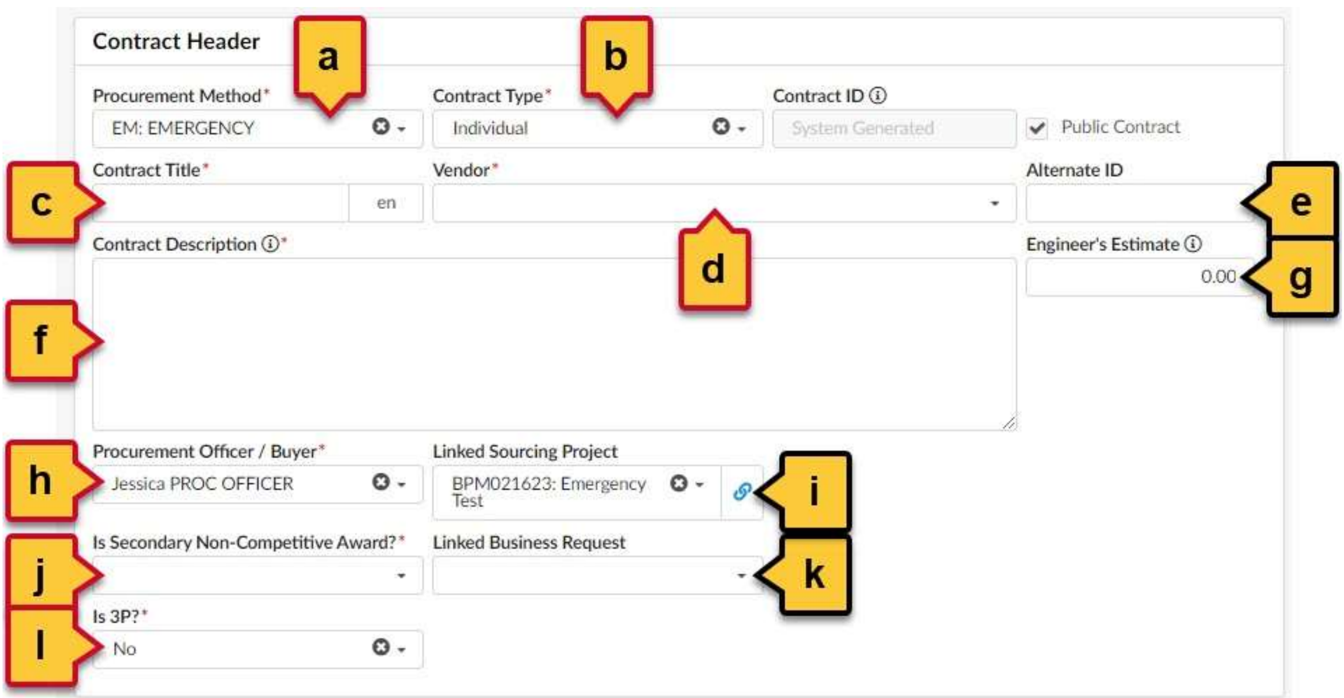


Figure 22: The form fields for the Contract Header section for an Emergency contract.

a. **Procurement Method (*):** Leave the procurement method in this field as EM: EMERGENCY.

b. **Contract Type (*):** Click this field to open the drop-down menu and select one of four options:
   i. Individual (default)
   ii. Master without Secondary Competition
   iii. Master with Secondary Competition
   iv. Secondary Level Agreement

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

d. **Vendor (*):** Click this field and enter the vendor involved with this contract. Select it from the drop-down menu when it appears.

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 this contract in this field.

g. **Engineer's Estimate:** Enter the dollar amount of the estimate for the project.

h. **Procurement Officer/Buyer (*):** This field auto-populates from the Emergency sourcing project info. No further action is required here.

i. **Linked Sourcing Project:** This field auto-populates from the Emergency sourcing project info. You do not need to do anything here.

j. **Is Secondary Non-Competitive Award? (*):** Is this a Secondary Non-Competitive Award? Click this field and select **Yes** or **No**. If you select **Yes**, five more fields display.

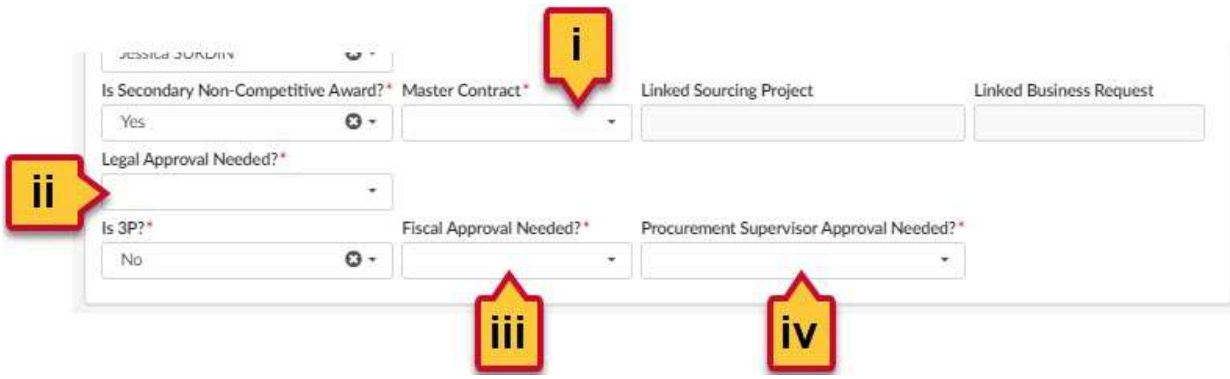


Figure 23: The additional fields that display for the Is Secondary Non-Competitive Award? field.

i. **Master Contract (*):** Click this field and select the Master Contract involved with this Secondary Non-Competitive award, or click **See All** and search for it in the window that opens. Click the checkbox to the left of the Master Contract to select it. The selected Master Contract populates in this field.

   NOTE: Any linked sourcing projects or Business Requests display in the respective fields, to the right.

ii. **Legal Approval Needed? (*):** Does this contract need Legal approval? Click this field and select **Yes** or **No** from the drop-down menu that opens.

iii. **Fiscal Approval Needed? (*):** Does this contract need Fiscal approval? Click this field and select **Yes** or **No** from the drop-down menu that opens.

iv. **Procurement Supervisor Approval Needed? (*):** Does this contract need Procurement Supervisor approval? Click this field and select **Yes** or **No** from the drop-down menu that opens.

k. **Linked Business Request:** If there is a Business Request involved in this Emergency sourcing project enter it in this field and select it from the drop-down menu that displays.

NOTE: You can only select a Business Request in this field if you selected **No** for the Is Secondary Non-

Competitive Award field (Step 35j).

l. **Is P3? (*):** Is this a Public-Private Partnership (P3) contract? Click this field and select **Yes** or **No** (default) from the drop-down menu.

36. Enter information in the form fields for the **Contract Dates** section (to the right of the Contract Header section). A red asterisk (*) indicates a required field. You may need to scroll horizontally to see this section.

Figure 24: The Contract Dates section for an Emergency contract.

a. **Effective Date (*):** By default, today's date shows in this field. If you need to change it to a future or past 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, if applicable.
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 25: The No end date field. Only appears for Master contracts.

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.

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

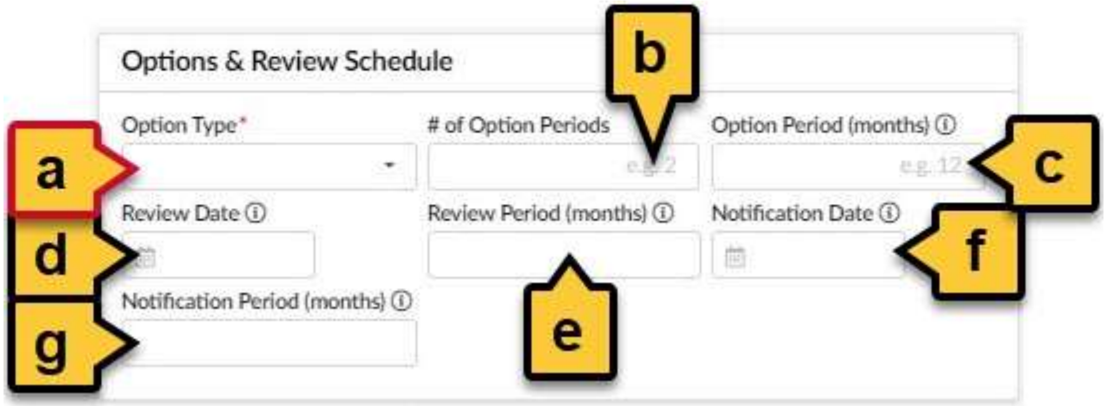


Figure 26: The Options & Review Schedule section for an Emergency Contract.

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).

38. Enter information in the **Contract Scope** section (below the Contract Header section):

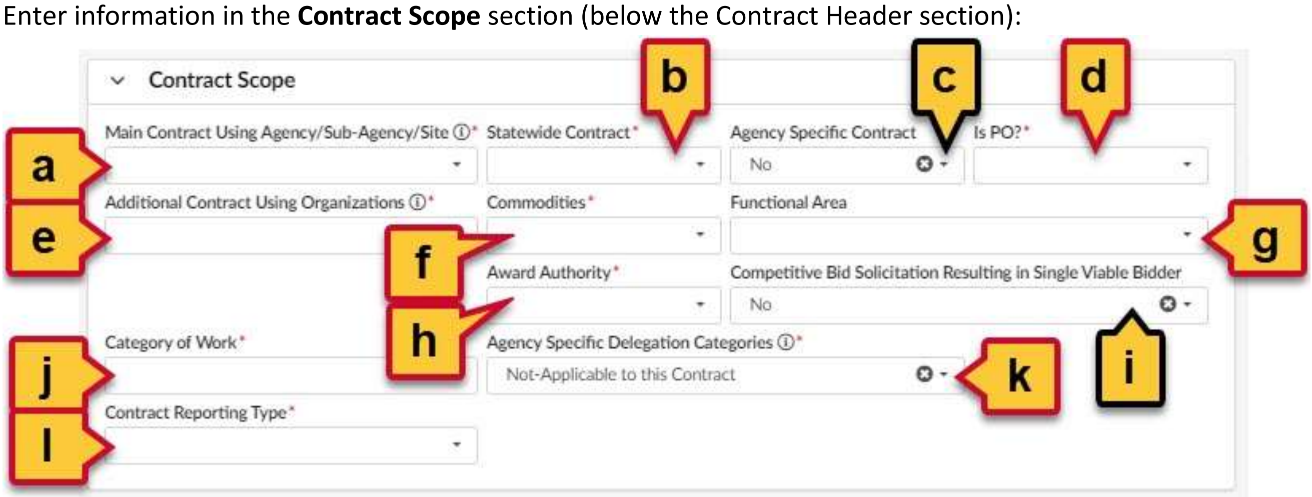


Figure 27: The Contract Scope section for an Emergency Contract.

a. **Main Contract Using Agency/Sub-Agency/Site (*):** Click this field to open the drop-down menu and select the **See All** option from the bottom of the menu. A new window opens. Use the fields at the top of the window to search for the main agency involved in this contract. Click the checkbox to the left of that agency. The selected agency populates this field.

b. **Statewide Contract (*):** Is this a statewide contract? Click this field and select **Yes** or **No** from the drop-down menu. If you select Yes, a new field displays:

Figure 28: The Subject to 1% Usage Fee field.

   i. **Subject to 1% Usage Fee (*):** Is this contract subject to a 1% Usage Fee? 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** (default) from the drop-down menu.

d. **Is PO (*):** Is this a Purchase Order (PO)? Click this field and select **Yes** or **No** from the drop-down menu.

e. **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.

   NOTE: If you don't have any additional agencies using this contract, you can select your main agency again.

f. **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) populates in this field.

g. **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.

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

i. **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.

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

Figure 29: The Hiring Agreement? field.

i. **Hiring Agreement (*):** Depending on your selection for Step 38j, 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.

k. **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.

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

39. Click the **Save** button at the top of the window.

    IMPORTANT!! If you skip this step, you risk losing all your progress to this point.

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

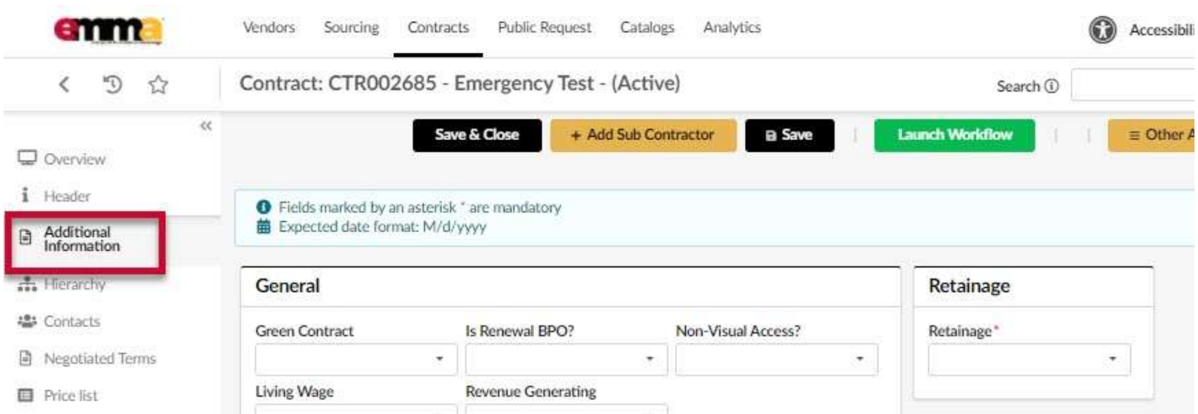


Figure 30: The Additional Information tab for a Contract.

41. 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.

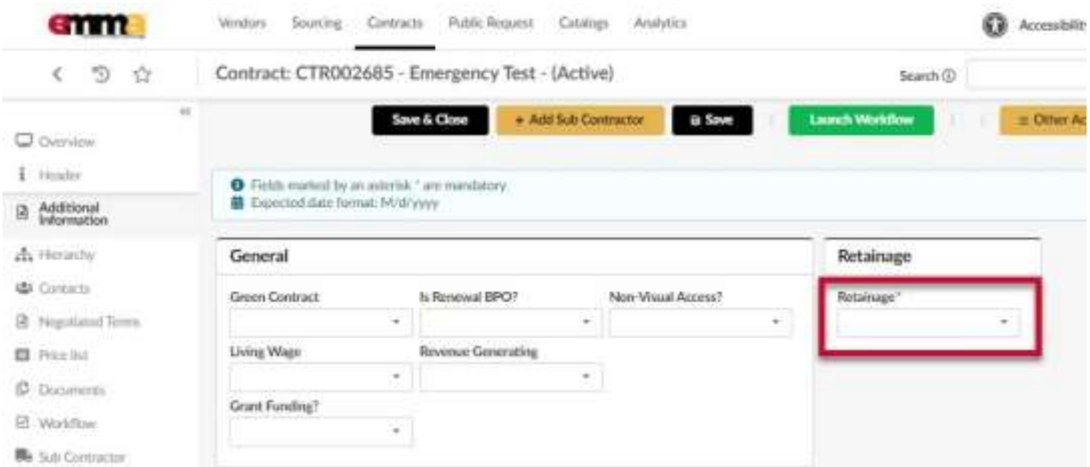


Figure 31: The Retainage section on the Additional Information page.

42. If you selected **Yes** in the previous step, follow these instructions. If not, skip to Step 45.

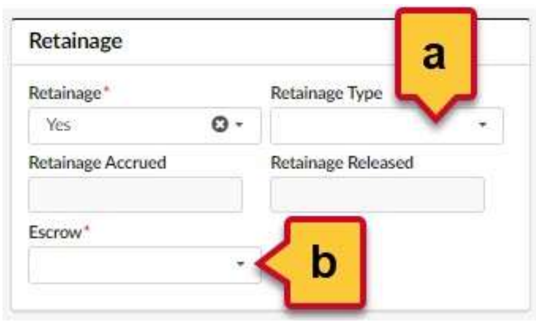


Figure 32: The Retainage form fields.

   a. Click the **Retainage Type** field to open the drop-down menu and select either **F: Fixed Amount** or **P: Percentage**. A new 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.

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

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

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

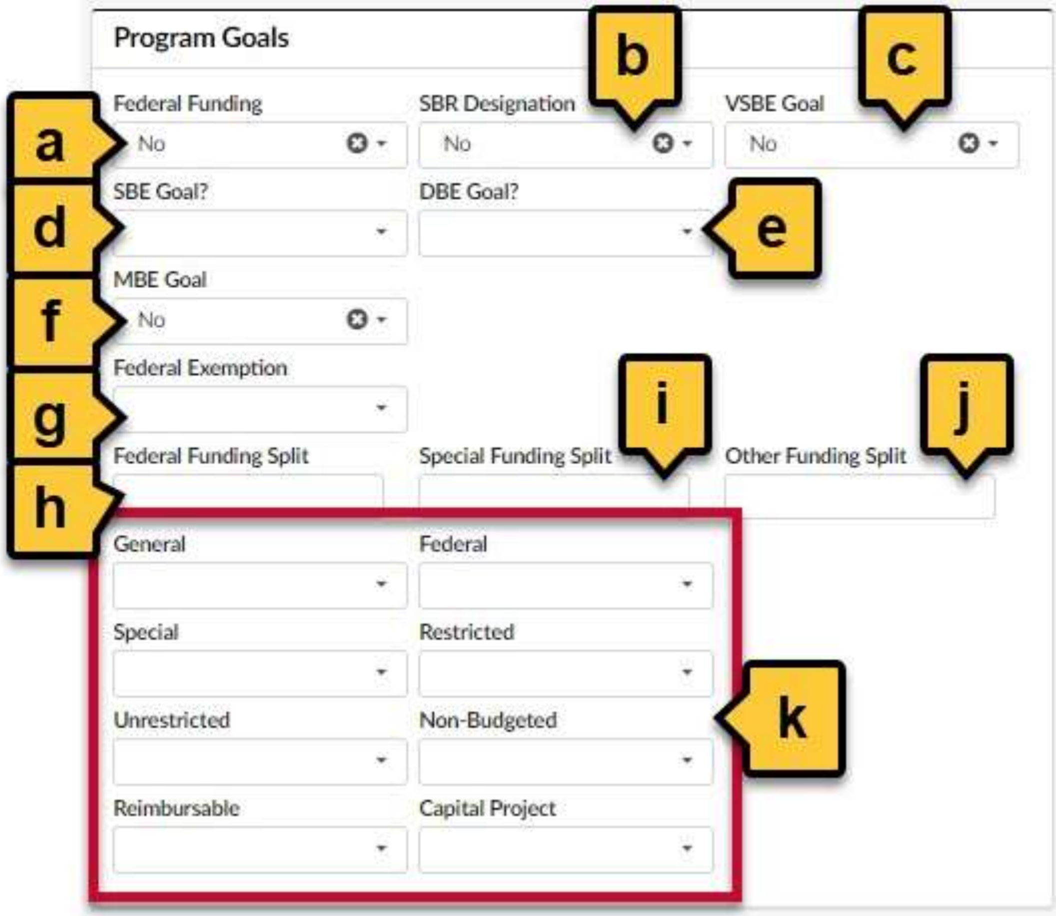


Figure 33: The Program Goals section.

a. **Federal Funding:** Does your program have Federal funding? Click this field and select **Yes** or **No**.
b. **SBR Designation:** Does your program have a Small Business Reserve (SBR) Designation? Click this field and select **Yes** or **No**.
c. **VSBE Goal:** Does your program 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**, seven new fields display.

Figure 34: The VSBE Waiver fields.

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

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

e. **DBE Goal?:** Does your program 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**, six new fields display in the Waiver section. Enter the appropriate answers in the respective fields as they apply to your project.

Figure 35: The DBE Waiver fields.

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

f. **MBE Goal:** Does your program 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:** Do you 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 36: The MBE Sub-Goal fields.

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.

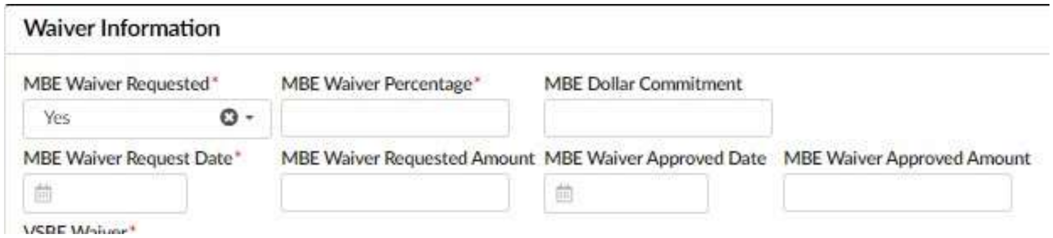


Figure 37: The MBE Waiver fields.

        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

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

45. Click the **Negotiated Terms** tab on the left-hand side-panel and enter the dollar value of the contract in the **Contract (Not-to-Exceed) Amount** field.

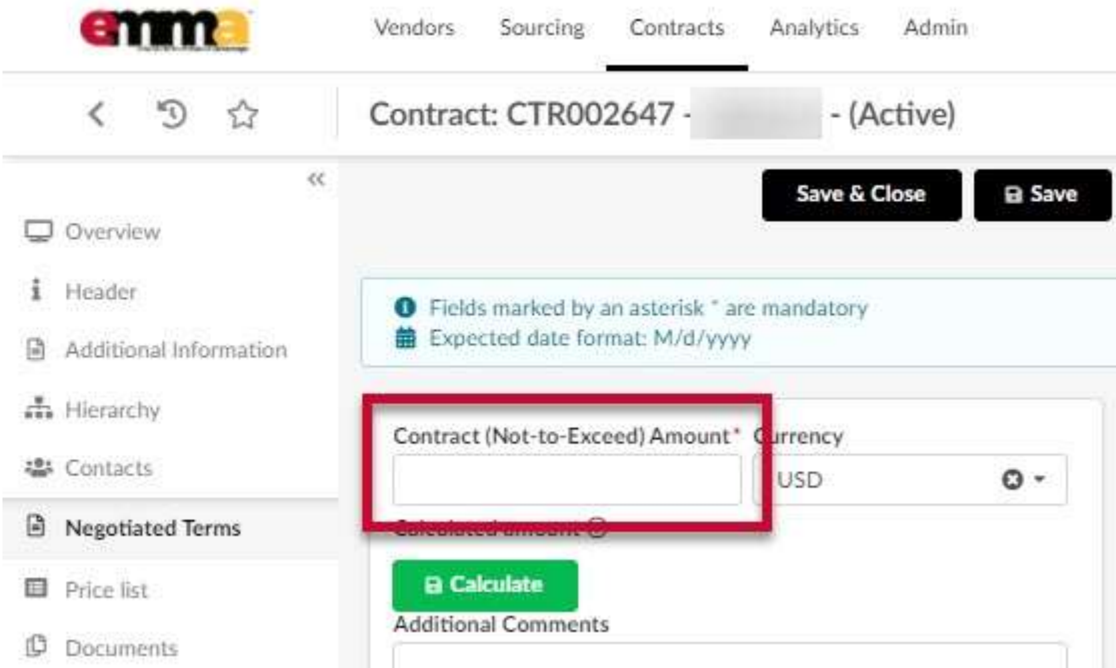


Figure 38: The Contract (Not-to-Exceed) Amount field in the Negotiated Terms tab.

46. Click the **Documents** tab on the left-hand side-panel and click the **+ Add Document** button.

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

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

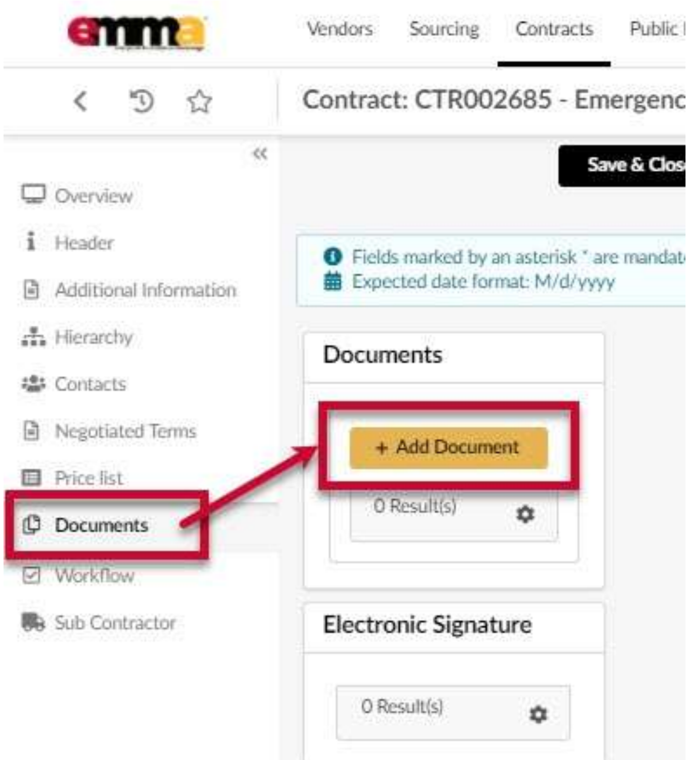


Figure 39: The Documents tab and the + Add Documents button.

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

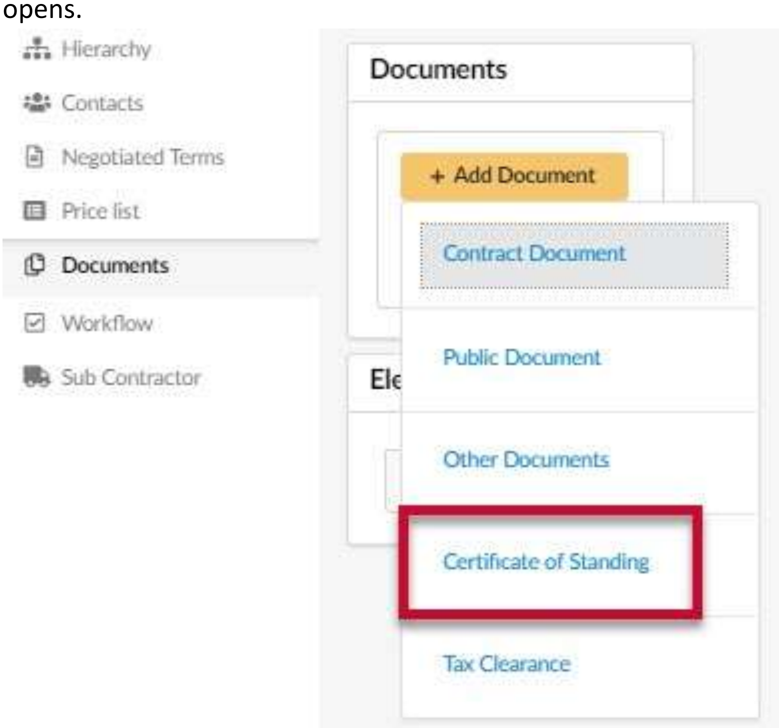


Figure 40: The Certificate of Standing option.

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

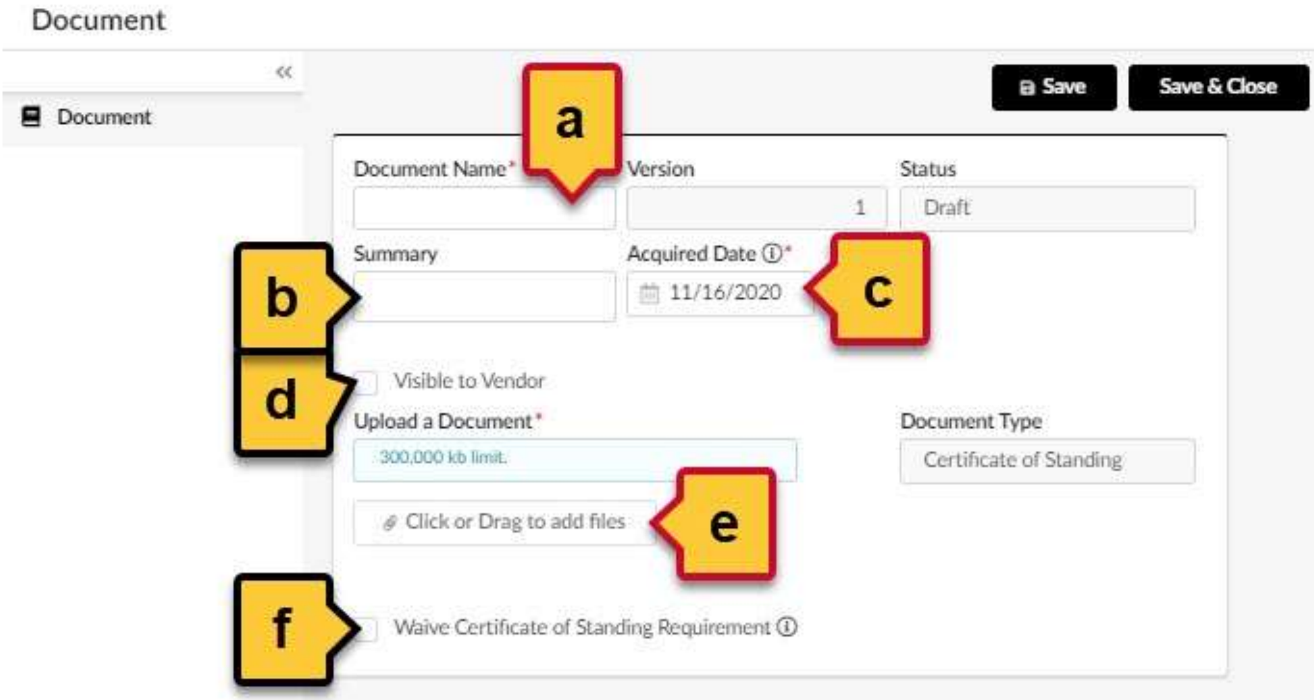


Figure 41: The Document form fields.

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.

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.

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

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

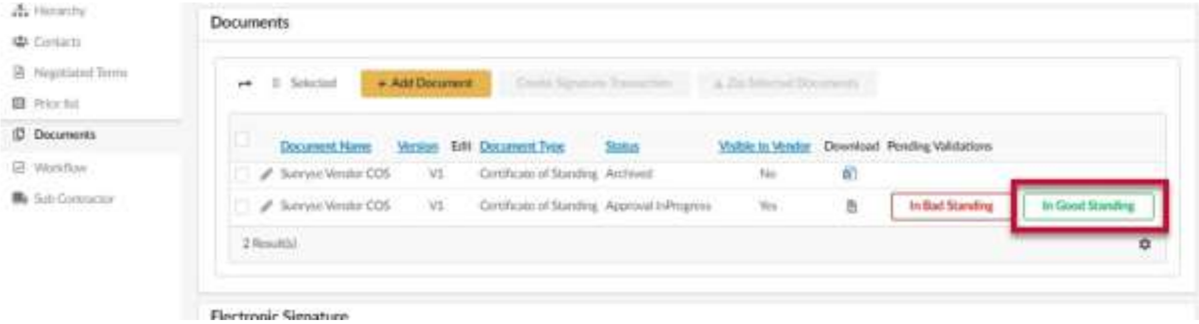


Figure 42: The In Good Standing button for a Certificate of Standing document.

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

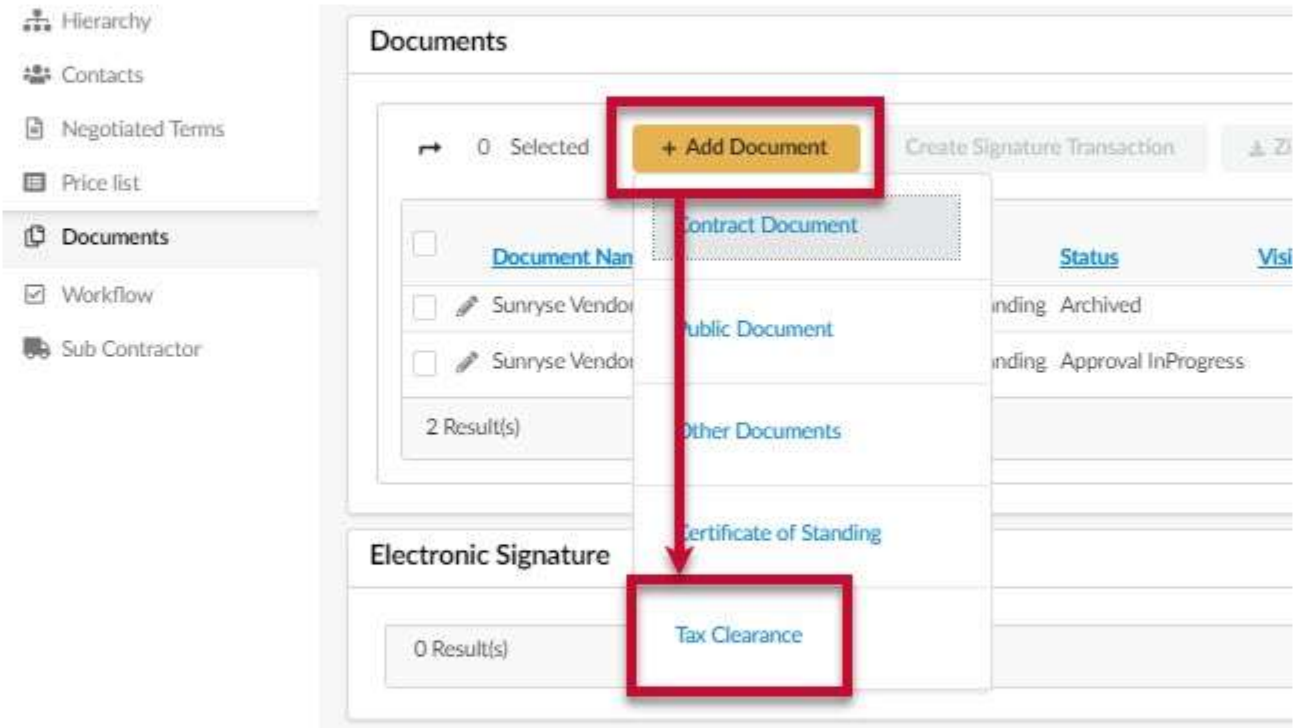


Figure 43: The + Add Document button and the Tax Clearance option.

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

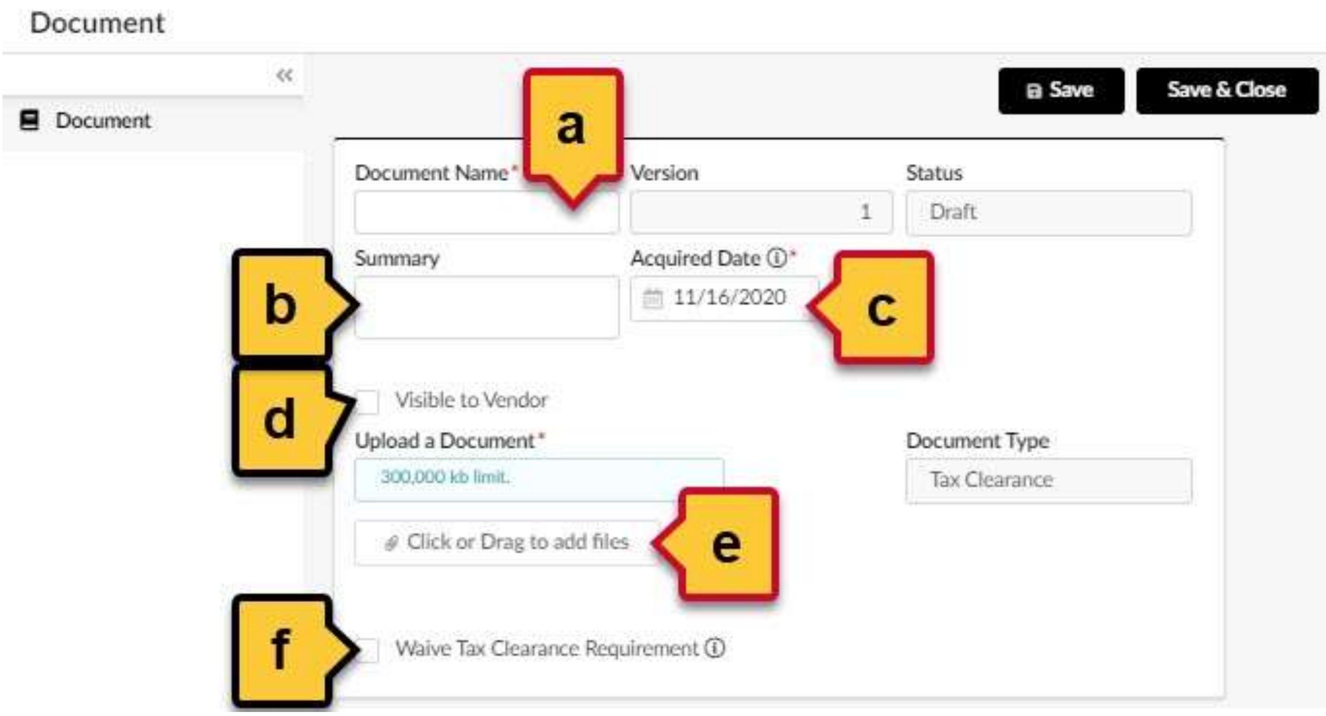


Figure 44: The Document form fields.

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:** Select this checkbox if you want Vendors 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.

f. **Waive Tax Clearance Requirement:** Select this checkbox to waive the tax clearance requirement.
   i. If you select this checkbox, the **Reason for Waiver Request (*)** field displays. Enter the reason for waiving this requirement.

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

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

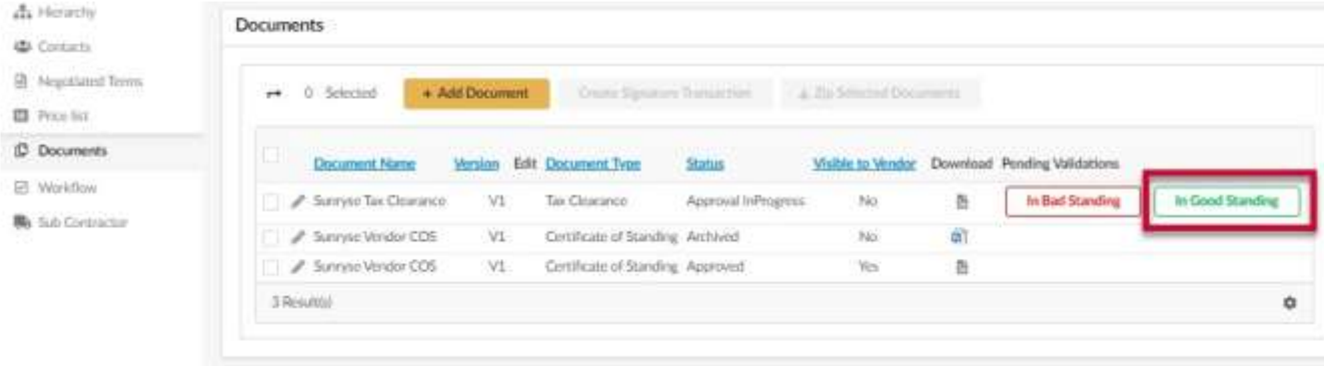


Figure 45: The In Good Standing button for a Tax Clearance document.

55. Click the **+ Add Document** button to open the drop-down menu and select the **Contract Document** option. The Document window opens.

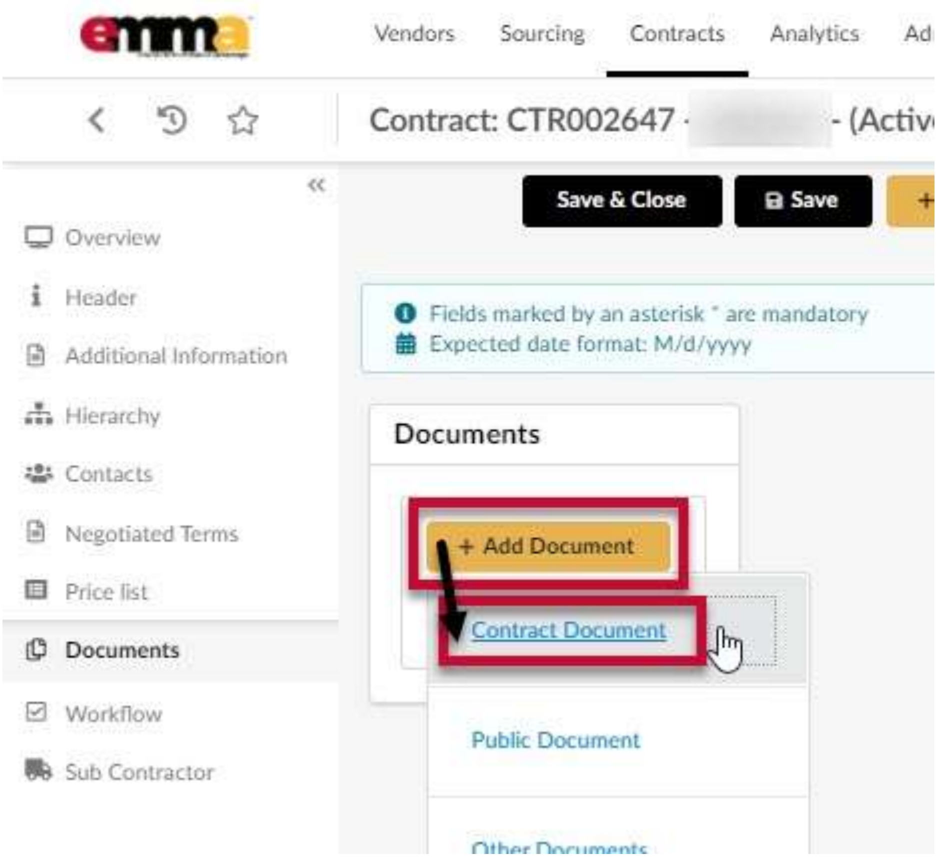


Figure 46: The Contract Document option in the + Add Document drop-down menu.

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

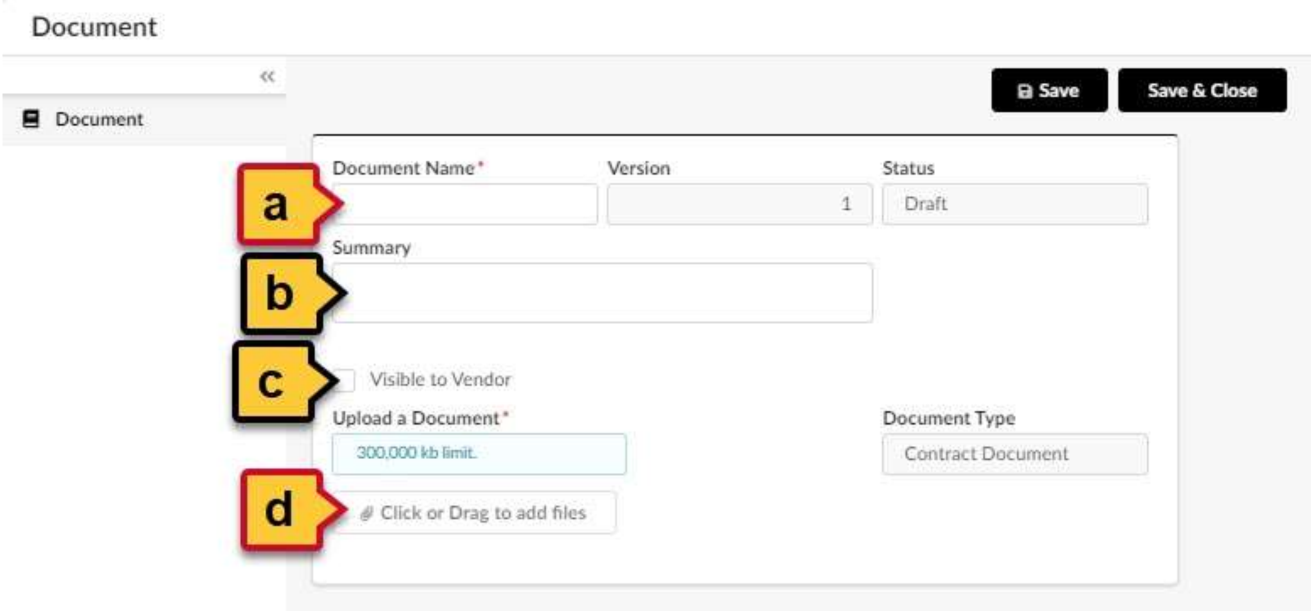


Figure 47: The form fields for a Contract Document in the Document window.

   a. **Document Name (*):** Enter the name for this document in this field.
   b. **Summary:** Enter a brief summary of the document in this field.
   c. **Visible to Vendor:** Click this checkbox to ensure that the selected Vendor can view the contract document.
   d. **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.

57. Click the **Save & Close** button at the top of the Document window. **IMPORTANT!!** Two pending validation buttons display to the right of the contract document; **Create New Version** and **Finalize By PO** (Procurement Officer). Do not select either button at this time.

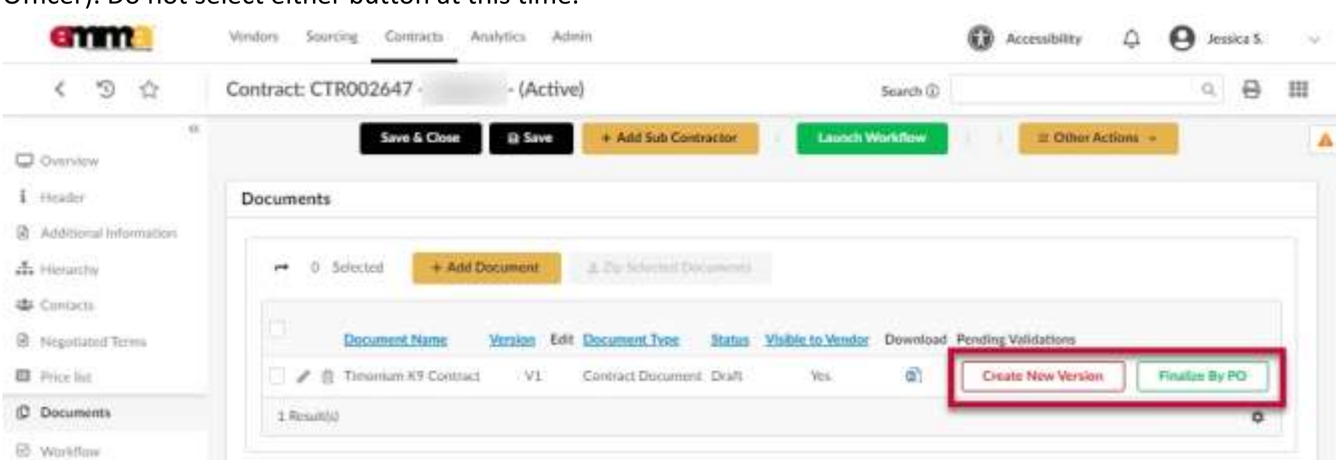


Figure 48: The Create New Version and Finalize By PO buttons for an uploaded Contract Document.

58. Click the **Save** button at the top of the Documents page.

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

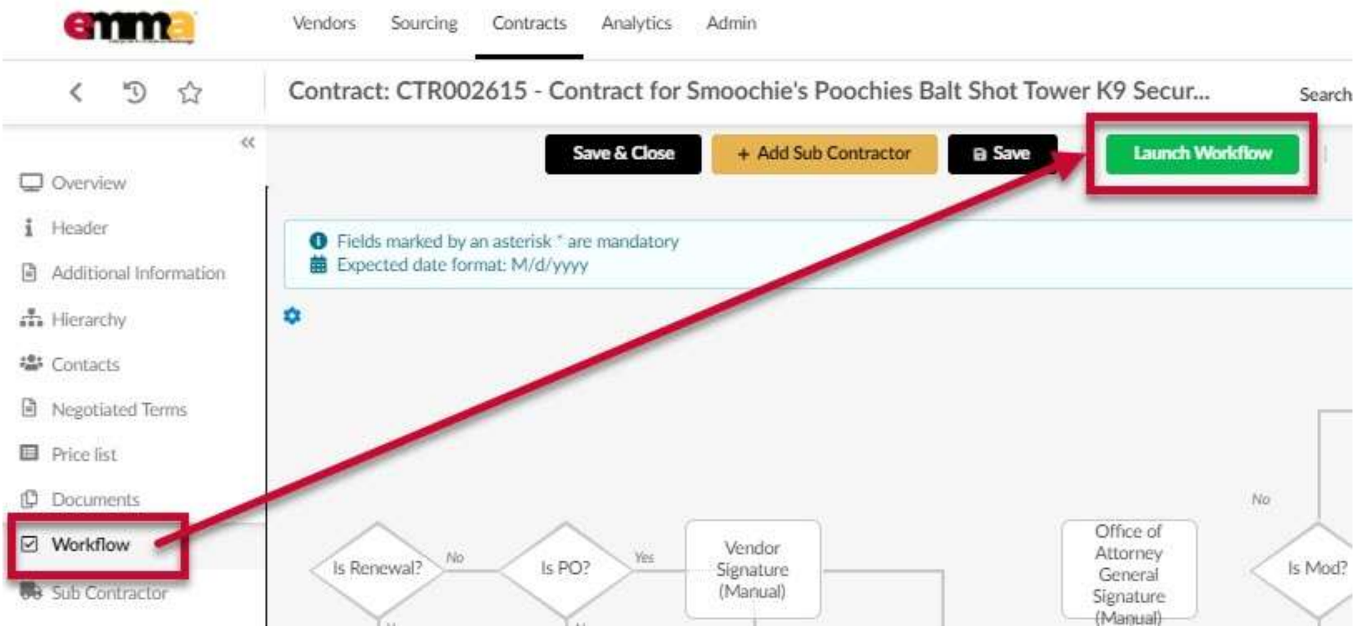


Figure 49: The Launch Workflow button in the Workflow tab.

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.

These instructions will follow the manual signing process (Step 59b).

a. Click the red **DocuSign** button at the top of the Workflow page to use the DocuSign service. The Signature Type point in the process turns red after you click it. The Vendor listed will receive an email from DocuSign with the contract attached and guidance as to where to sign.

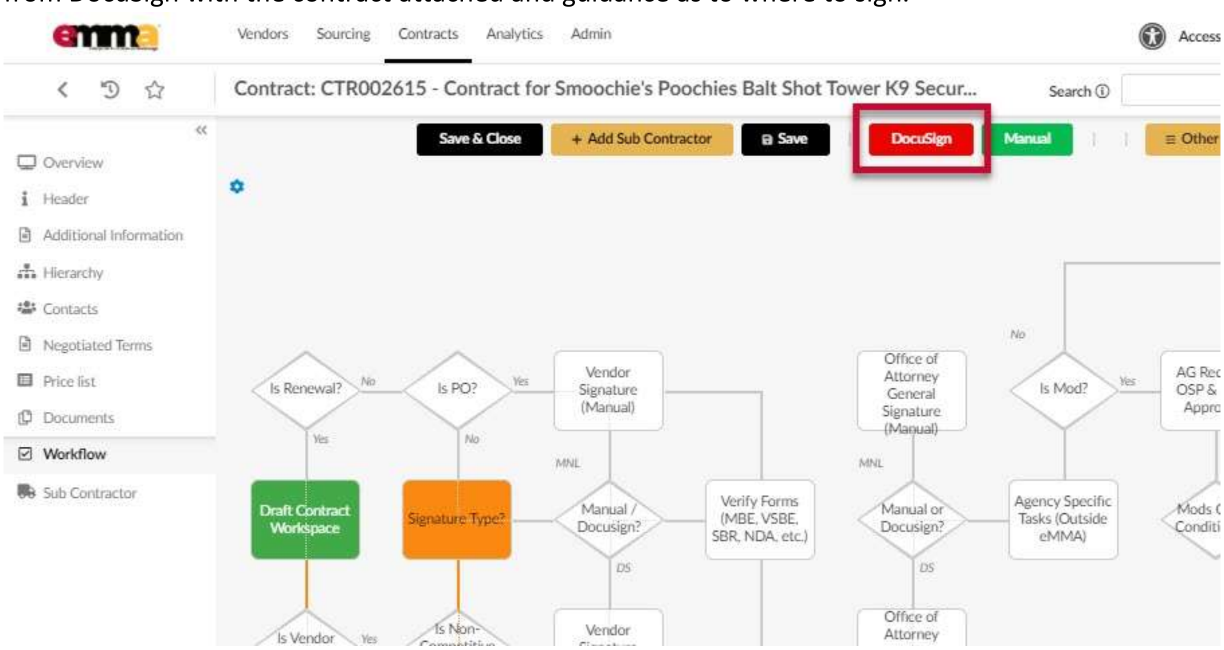


Figure 50: The DocuSign button on the Workflow page for electronic signatures in eMMA.

b. 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.

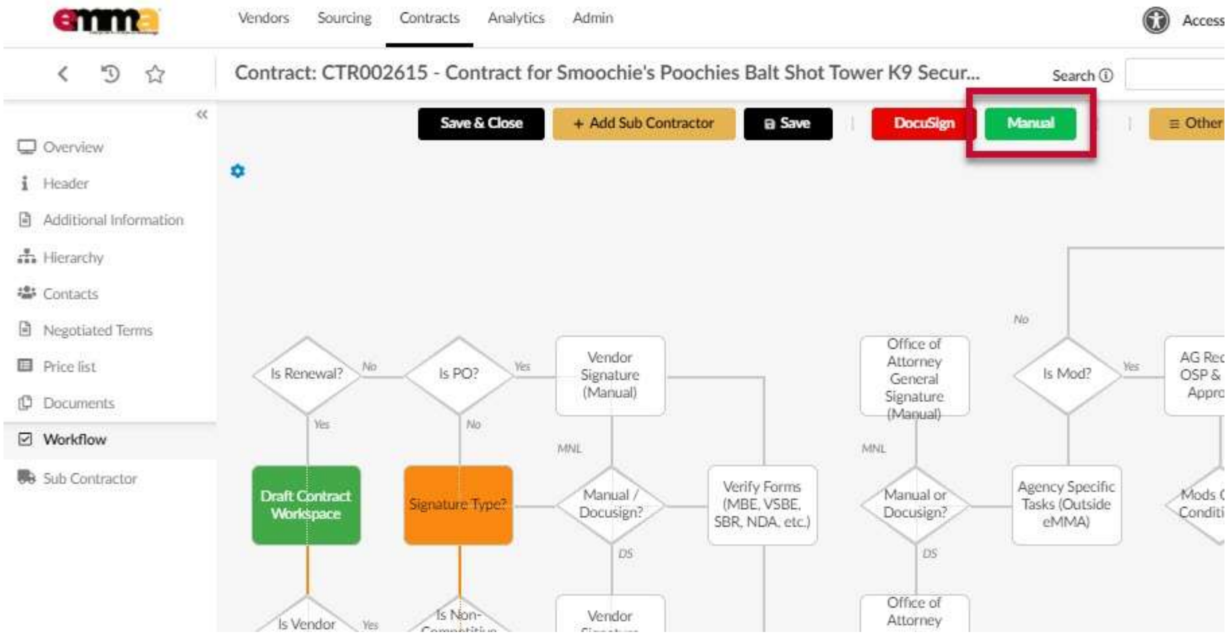


Figure 51: The Manual button on the Workflow page for manual signatures in eMMA.

60. Click **Save** at the top of the Workflow page.

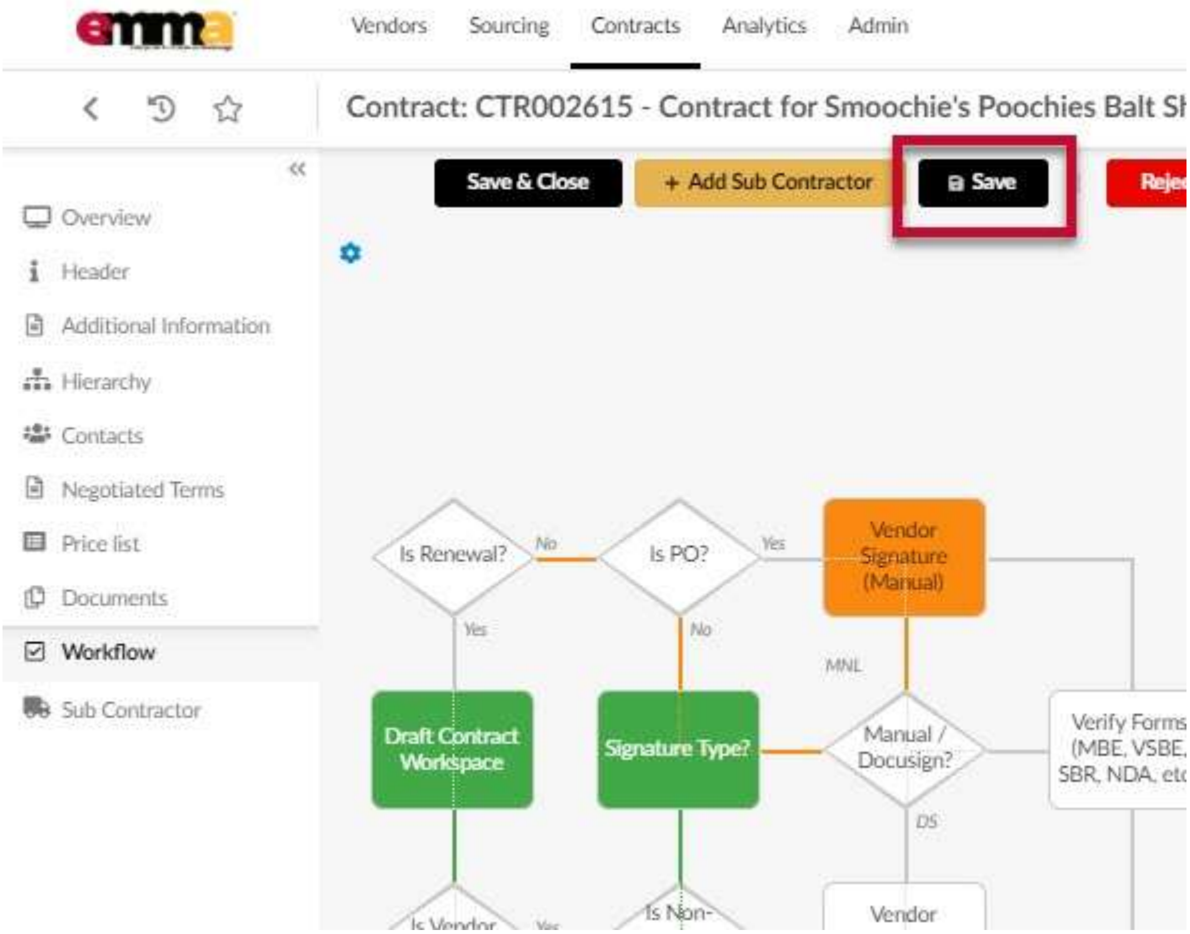
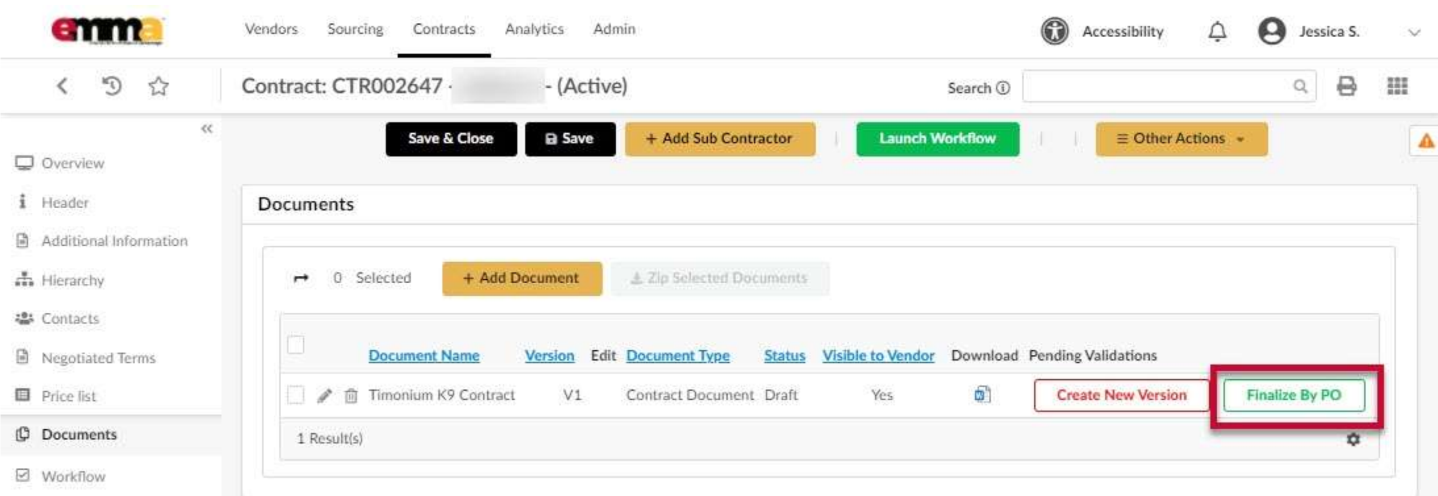


Figure 52: The Save button at the top of the Workflow page.

From this point, eMMA notifies the Vendor that they need to sign the document. It will then come back to the Procurement Officer and then move to the Approvers. The Approvers sign while the Procurement Officer makes Agency Specific Task Approvals and Form Verifications between each approval from the signatories. Follow the workflow and make sure to complete the responsive and responsibility checks for the vendor.

Once all approvals are complete, the Procurement Officer clicks the **Finalize** button for the Contract Document in the **Documents** tab.



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

The Procurement Officer clicks the **Publish** button in the **Workflow** tab. A popup asks you to confirm that Contracts for all Emergency services under $50,000 must be reported to BPW (outside of eMMA) within 45 days of contract execution; no approvals, just notification. Click **OK**.

Approval History

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

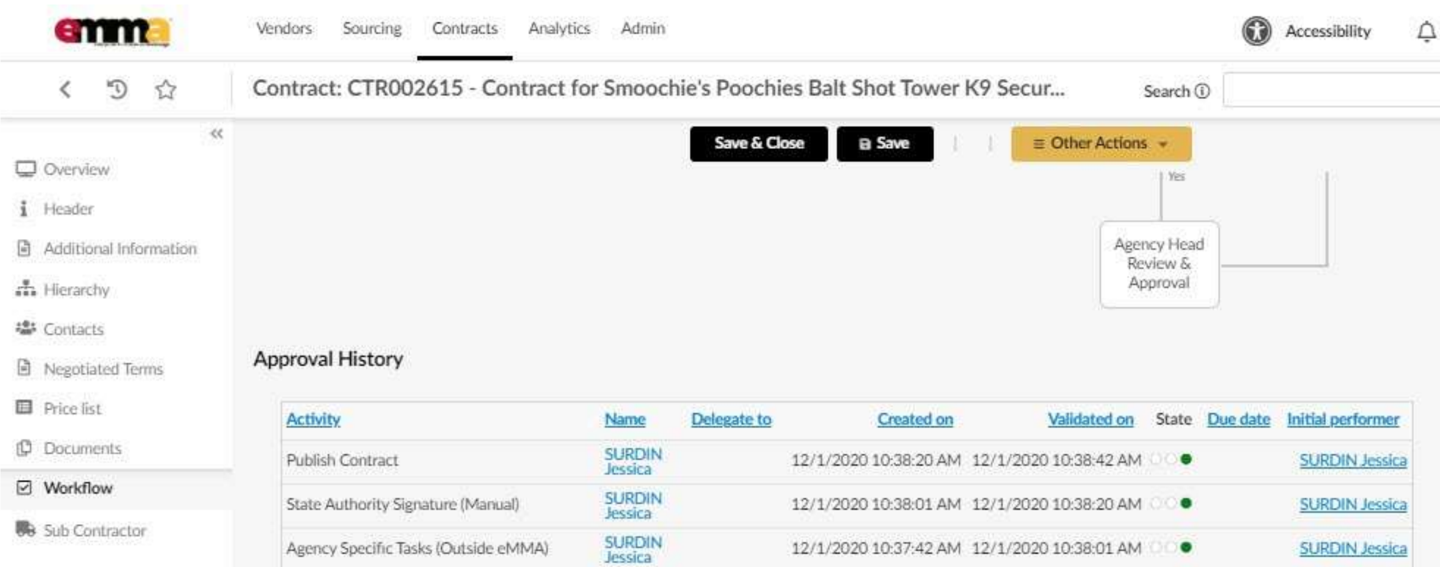


Figure 53: The Approval History section for a Contract.

This section shows:

- **Activity:** the task itself.
- **Name:** The user who created 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 current state of the task, green indicates a completed task.
- **Due Date** (if applicable)**:** The date the task was due.
- **Initial Performer:** The user who completed the 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.

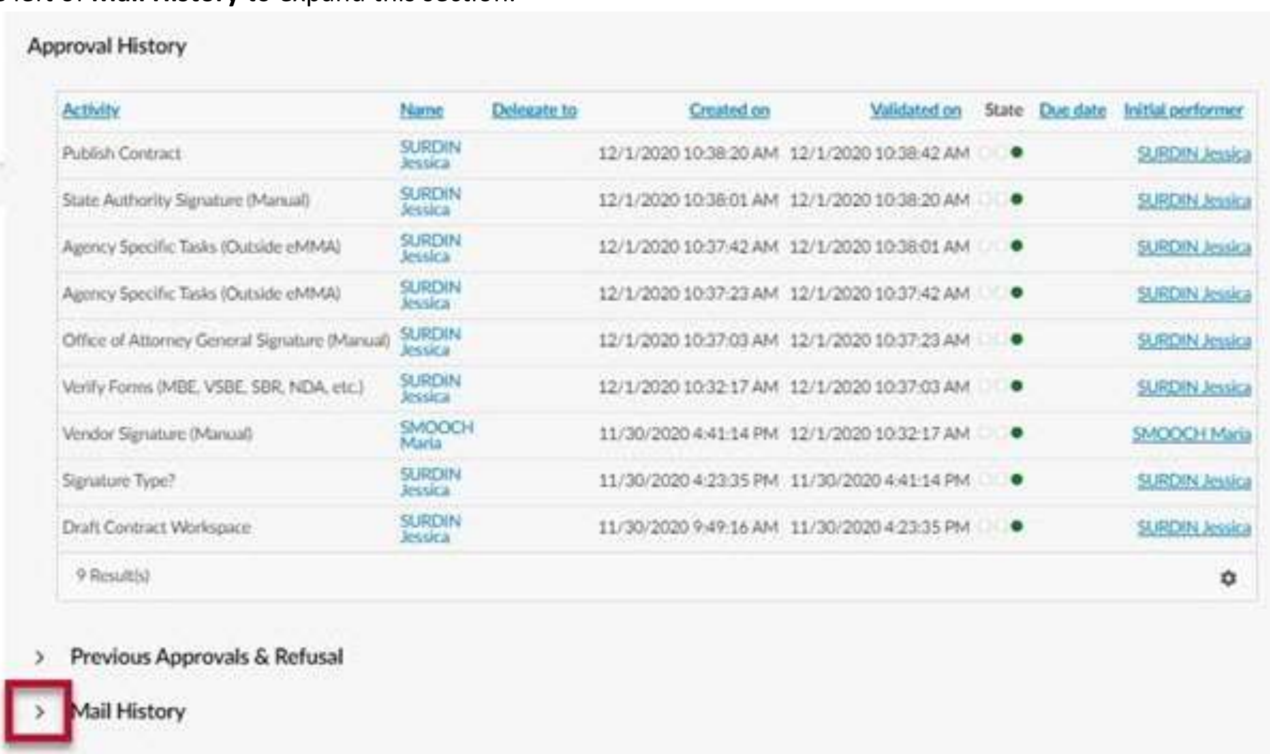


Figure 54: The chevron (arrow) to the right of the Mail History section.

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

Figure 55: The Mail History section for an Emergency Contract.