

OVERVIEW

This Quick Reference Guide (QRG) is designed to help you understand how to create an Amendment in eMMA.

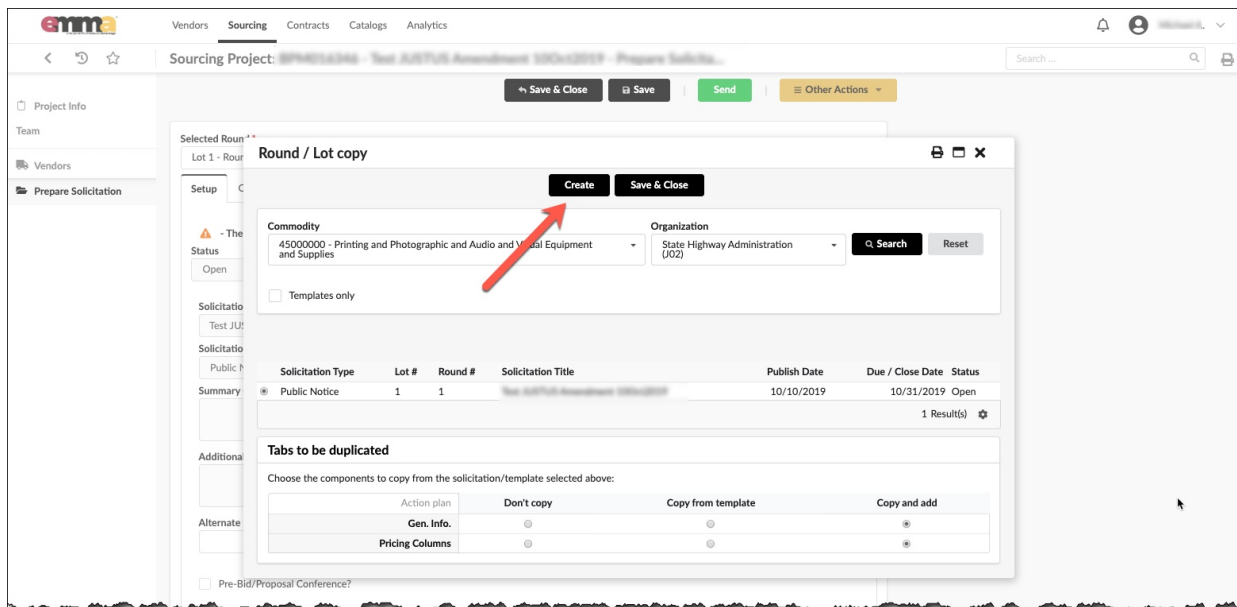
Creating an Amendment

1. Access eMMA via SecureAuth or your login. IMPORTANT: For best results, access eMMA via Google Chrome.
2. Find your sourcing project under Sourcing, "Browse Sourcing Projects".
3. In your Sourcing project, click on the "Prepare Solicitation" tab.
4. Click "Other Actions" and select "Create a new round" from the drop-down menu.

The screenshot displays the eMMA web application interface for the 'Prepare Solicitation' tab. The top navigation bar includes 'Vendors', 'Sourcing', 'Contracts', 'Catalogs', and 'Analytics'. The breadcrumb trail shows 'Sourcing Project: BPM016346 - Test AUSTUS Amendment 10/31/2019 - Prepare Solicitation'. The left sidebar contains 'Project Info', 'Team', 'Vendors', and 'Prepare Solicitation'. The main content area has a 'Selected Round' dropdown set to 'Lot 1 - Round 1'. Below this are tabs for 'Setup', 'Questions', 'Pricing', 'Attachments', 'Invited Vendors', and 'Workflow'. The 'Setup' tab is active, showing a status of 'Open' and a message: '- The solicitation is now in an open status and viewable on the public portal.' The form includes fields for 'Solicitation Title', 'Solicitation Type' (set to 'Public Notice'), 'Summary', and 'Additional Information & Instructions'. On the right, there are sections for 'Response Dates' (Publish Date: 10/10/2019 4:19:42 PM, Due / Close Date: 10/31/2019 12:00:00 AM) and 'Public Visibility Dates' (Public Portal Publish Date: 10/10/2019 4:19:42 PM, Public Portal Archive Date: 10/31/2026 12:00:00 AM). A red arrow points to the 'Other Actions' dropdown menu, which is open, showing options: 'Create a new lot', 'Create a new round' (highlighted with a red box), and 'Close'.

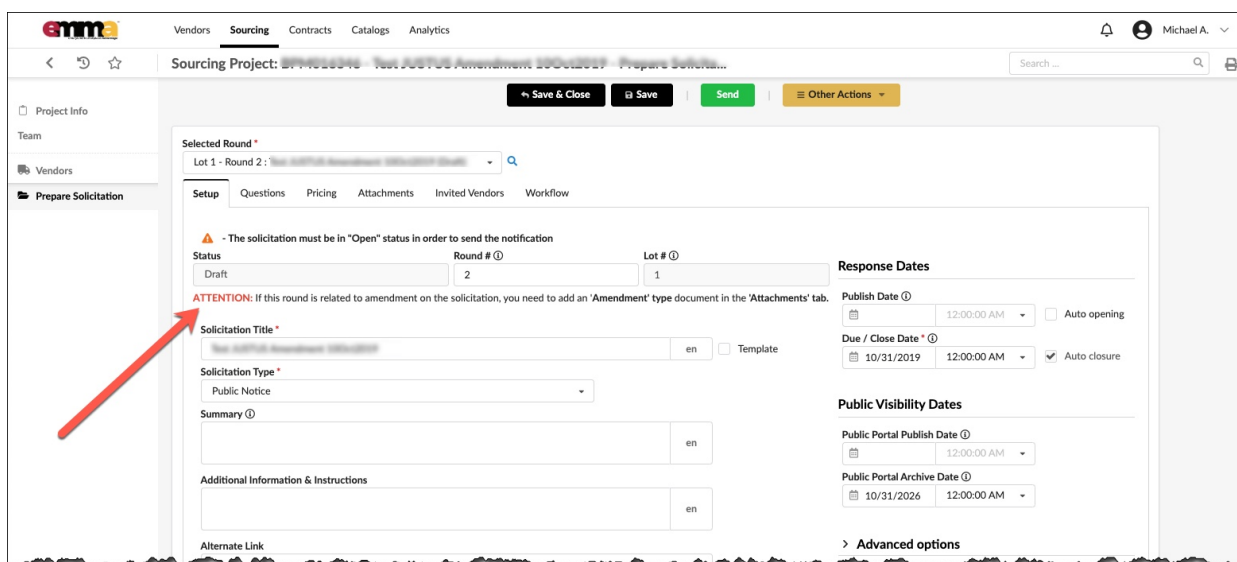
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- Click "Create" to pull all information from your solicitation into the new round. Click "Continue" on the warning.



The screenshot shows the 'Round / Lot copy' dialog box in the eMMA system. The dialog has a 'Create' button highlighted with a red arrow. Below the button, there are fields for 'Commodity' (45000000 - Printing and Photographic and Audio and Visual Equipment) and 'Organization' (State Highway Administration (J02)). There is also a 'Search' button and a 'Reset' button. Below these fields, there is a table with columns: Solicitation Type, Lot #, Round #, Solicitation Title, Publish Date, Due / Close Date, and Status. The table shows one row: Public Notice, 1, 1, Test JUTUS Amendment 100000000, 10/10/2019, 10/31/2019, Open. Below the table, there is a section 'Tabs to be duplicated' with a table of options: Action plan, Gen. Info., and Pricing Columns. The 'Gen. Info.' and 'Pricing Columns' rows have radio buttons for 'Don't copy', 'Copy from template', and 'Copy and add'.

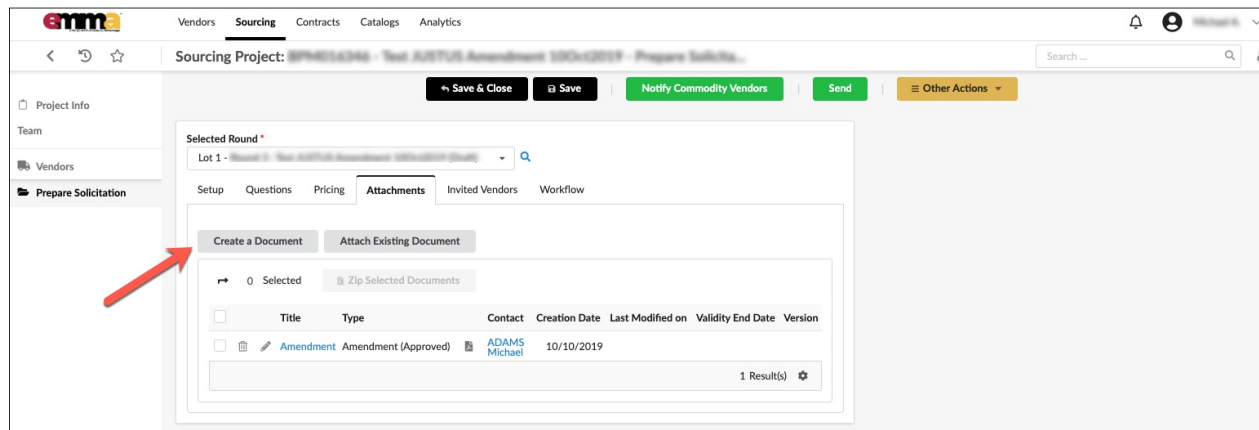
- A new round is created in "Draft" status with an Attention Message regarding information about how to proceed with an Amendment. Update the solicitation as needed (e.g. change due date in "Setup" sub-tab). Click "Save".



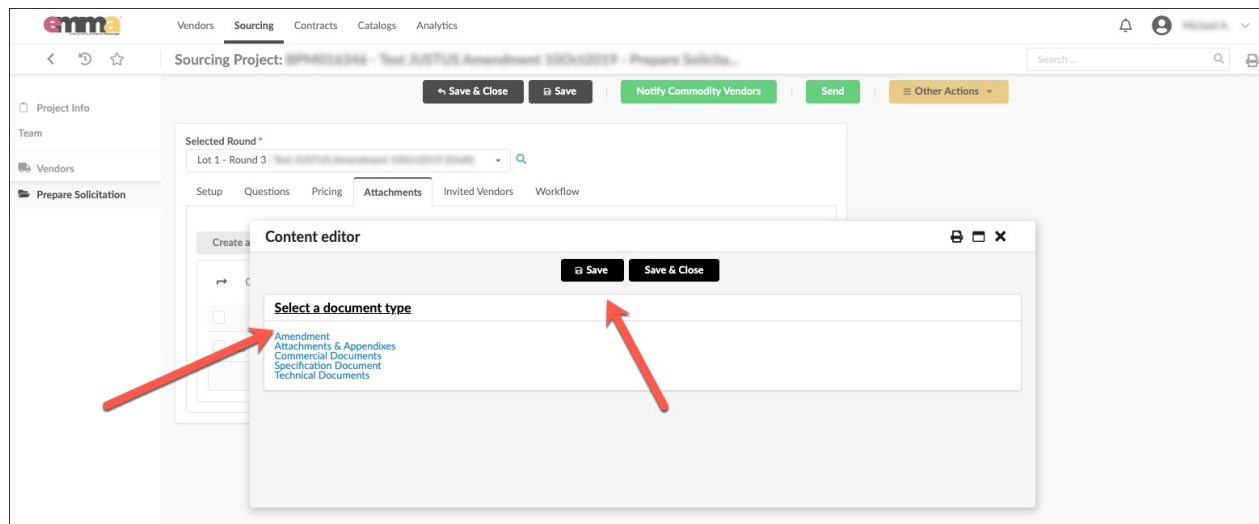
The screenshot shows the 'Setup' sub-tab for a new round in the eMMA system. The 'Status' field is set to 'Draft'. A red arrow points to the 'Draft' status field. Below the status field, there is an 'ATTENTION' message: 'If this round is related to amendment on the solicitation, you need to add an 'Amendment' type document in the 'Attachments' tab.' There are also fields for 'Solicitation Title', 'Solicitation Type', 'Summary', and 'Additional Information & Instructions'. On the right side, there are sections for 'Response Dates' and 'Public Visibility Dates' with various date and time pickers.

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7. Navigate to the Attachments sub-tab, then click “Create a Document”.



8. Choose “Amendment”.



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- Fill in all required fields marked with an asterisk (*). Change status from "Draft" to the appropriate status ("Approved", "To Be Approved", etc.). Click "Save & Close".

- Return to the "Setup" sub-tab. To send and open round immediately, leave the open date and time blank. To send at a particular date and time, enter that information and click auto-open. Click "Save".
- Click "Send".

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14. Mark at least one (1) vendor. Click “Send and close”.

The screenshot shows the 'Solicitation: Test JUSTUS Amendment 10Oct2019' page. The 'Send and close' button is highlighted with a red arrow. The page displays a table of vendors to be sent, including Aileron Consulting LLC and A. Morton Thomas and Associates, Inc., with their respective sending modes and users.

Company Name	Sending modes	User
Aileron Consulting LLC	Email	Deja BRACEY
A. Morton Thomas and Associates, Inc.	Email	

15. Three pop-up prompts appear:

- 1st prompt asks for confirmation to move forward, click “OK”;
- 2nd prompt asks for opening the solicitation immediately upon submission – click “OK”, if round should auto-open at specific date and time entered on Setup sub-tab, click “Cancel”;
- 3rd prompt asks for closing the previous round, click “OK”.

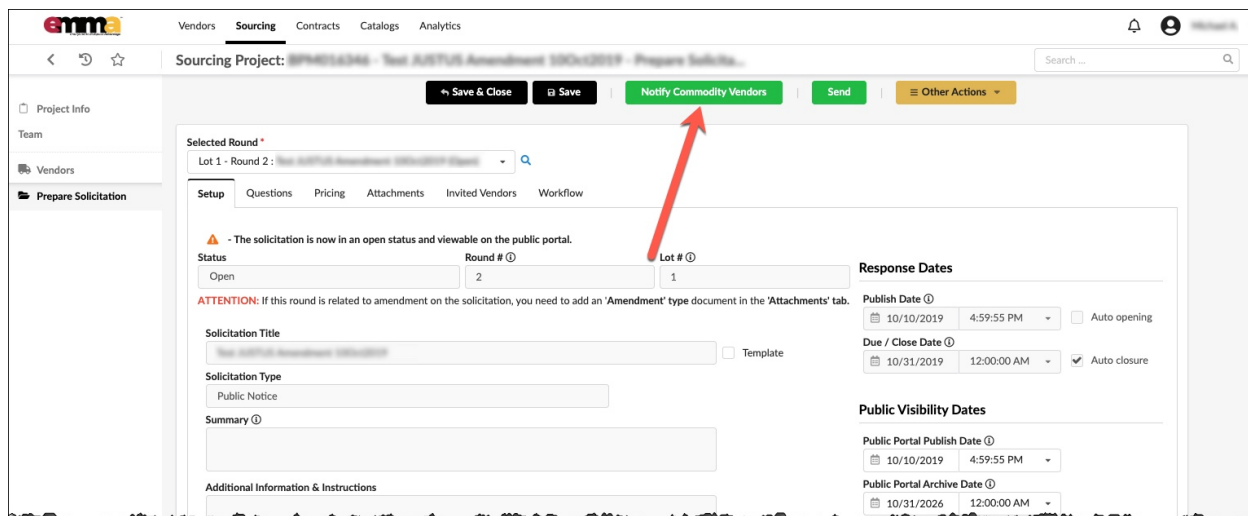
16. Click “Save”.

The screenshot shows the 'Sourcing Project: 104016443 - TEST Justus 11Oct2019 - Prepare Solicitation' page. The 'Save' button is highlighted with a red arrow. The page displays the 'Setup' tab with fields for Status, Round #, Lot #, Solicitation Title, Solicitation Type, and Response Dates.

Status	Round #	Lot #
Draft	2	1

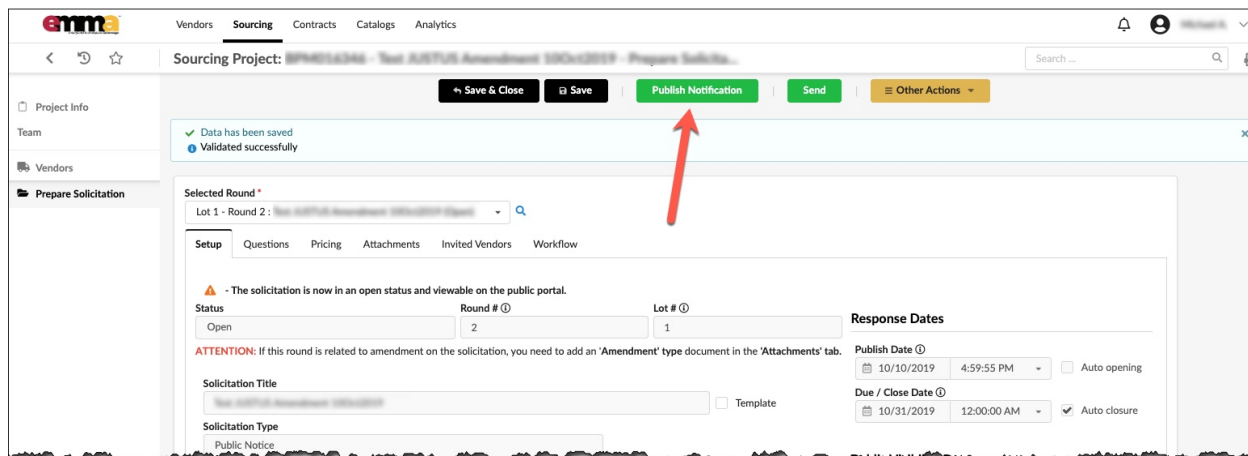
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17. Click “Notify Commodity Vendors”. Click “OK” at the prompt.



The screenshot shows the eMMA Sourcing Project page for 'Sourcing Project: 0PM014346 - Test JUSTUS Amendment 10/10/2019 - Prepare Solicitation'. The 'Notify Commodity Vendors' button is highlighted with a red arrow. The page includes a sidebar with 'Project Info', 'Team', 'Vendors', and 'Prepare Solicitation'. The main content area shows the 'Setup' tab with fields for 'Status' (Open), 'Round # 1' (2), and 'Lot # 1' (1). A message states: '- The solicitation is now in an open status and viewable on the public portal.' Below this, there are fields for 'Solicitation Title', 'Solicitation Type' (Public Notice), and 'Summary'. To the right, there are 'Response Dates' and 'Public Visibility Dates' sections with date and time pickers.

18. Click Publish Notification. Click “OK” at the prompt.



The screenshot shows the eMMA Sourcing Project page after clicking 'Publish Notification'. A message at the top states: 'Data has been saved' and 'Validated successfully'. The 'Publish Notification' button is highlighted with a red arrow. The page layout is similar to the previous screenshot, but the 'Status' is now 'Open' and the 'Round # 1' is '2'. The 'Solicitation Title' and 'Solicitation Type' (Public Notice) fields are visible. The 'Response Dates' and 'Public Visibility Dates' sections are also present.