



Create or Cancel Amendments in eMMA Quick Reference Guide

Overview

Amendments, or Rounds, are used in procurement to modify existing solicitations. This Quick Reference Guide (QRG) is designed to help you, the Buyer, understand how to create an Amendment in eMMA. It also explains how to use the Amendment to notify vendors if you are cancelling the solicitation.

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

Step-by-Step Instructions

Cancel an Amendment

To cancel a published sourcing project, you must first create an Amendment. Follow the instructions below for Creating an Amendment and add "Cancelled" to the title (see Step 21). Once finished, please contact the eMMA helpdesk at emma.helpdesk@maryland.gov to change your project's status from "In Progress" to "Cancelled." The ability to change a project's status is currently disabled.

Create an Amendment

< Placeholder for Training Video >

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.

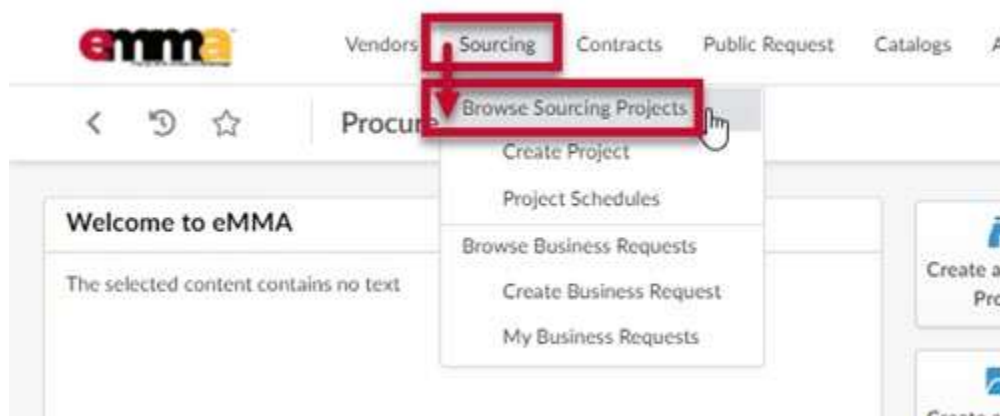


Figure 1: The Sourcing tab and the Browse Sourcing Project option in eMMA.

1. Use the Search fields and filters to find the solicitation and click the Edit (pencil) icon to the left to view the project.



Figure 2: The Edit (pencil) icon for a sourcing project in eMMA.

3. Click the **Prepare Solicitation** tab in the left-hand side-panel.
4. Click the **Other Actions** button on the top right side of the page and select **Create a new round** from the drop-down menu that opens. The Round/Lot copy window opens.

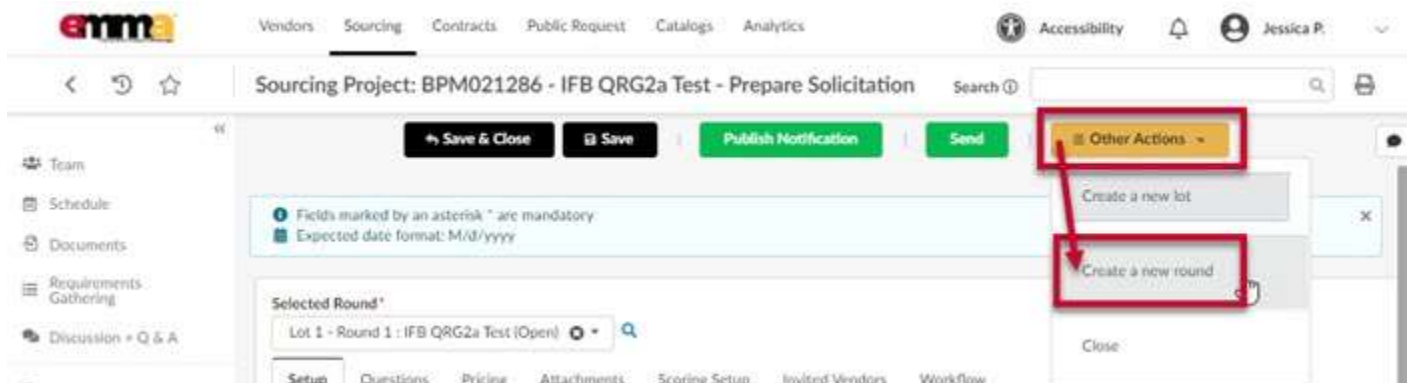


Figure 3: The Other Actions button and the Create a new round option.

- Click the **Create** button to pull all the information from your solicitation into the new round.

Round / Lot copy

Create **Save & Close**

Commodity: 30000000 - Structures and Building and Construction and Manufacturing Components and Supplies

Organization: Department of General Services (MDDGS) **Search** **Reset**

Business Request: ☐ Templates only

Solicitation Type	Lot #	Round #	Solicitation Title	Publish Date	Due / Close Date	Status
IFB: Invitation for Bid	1	1	IFB Test 1 JS	10/23/2020	10/31/2020	Open

1 Result(s)

Tabs to be duplicated

Choose the components to copy from the solicitation/template selected above:

Action plan	Don't copy	Copy from template	Copy and add
Gen. Info.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pricing Columns	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Figure 4: The Create button in the Round/Lot copy window.

- A confirmation prompt opens asking you to confirm that you want to create a new round. Click the **Continue** button on the prompt to proceed. A new round is created as **Draft** in the **Status** field, and an attention message displays information about how to proceed with the amendment.

Status **Round # ①** **Lot # ①**

Draft **2** **1**

ATTENTION: If this round is related to amendment on the solicitation, you need to add an 'Amendment' type document in the 'Attachments' tab.

Solicitation Title *
IFB QRG2a Test **en** ☐ Template

Solicitation Type *
IFB: Invitation for Bid **+**

Summary ①

Figure 5: The created new round (Round 2) in Draft state and the attention message..

- Update the solicitation as needed (e.g. change due date in **Setup** sub-tab) and click the **Save** button at the top of the page.
- On the Prepare Solicitation page, click the **Attachments** subtab and click the **Create a Document** button. The Content editor pop-up window opens.

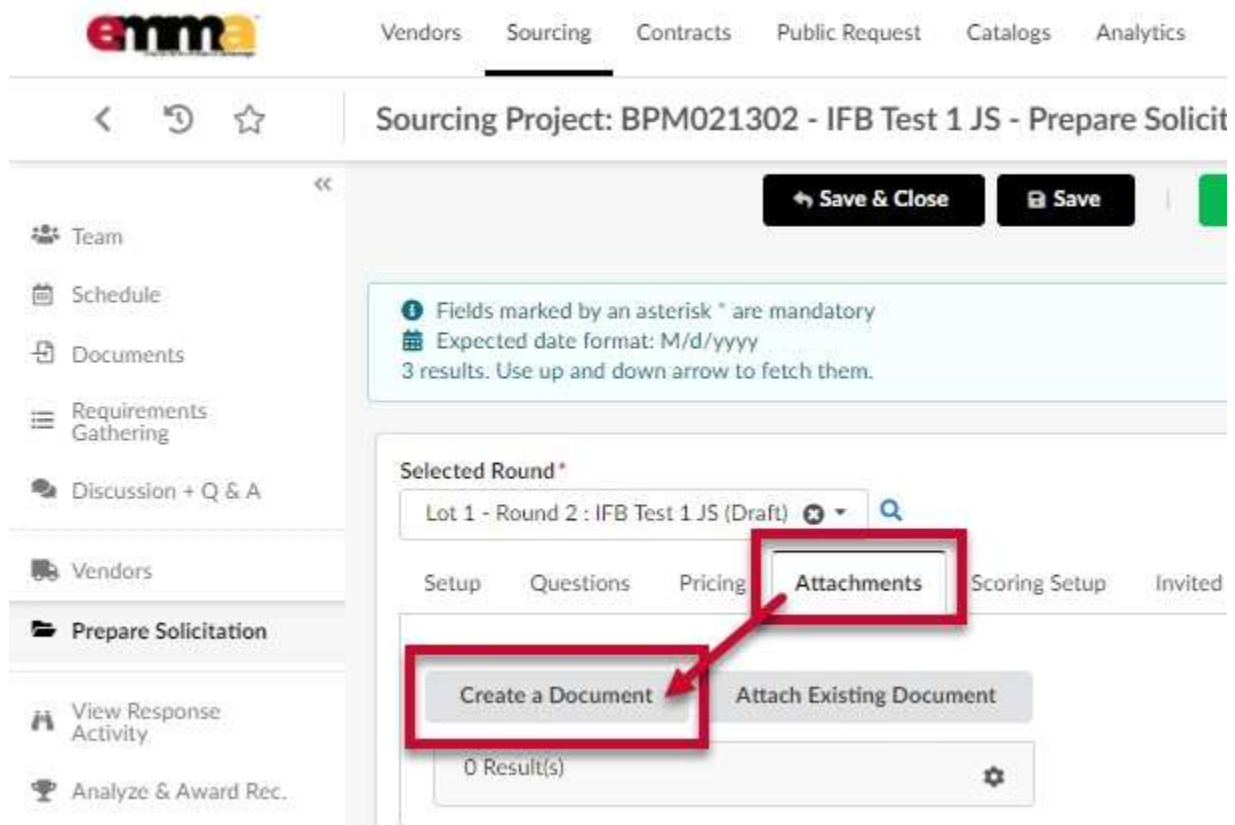


Figure 6: The Attachments tab and the Create a Document button in the Prepare Solicitation side tab.

9. Click the **Amendment** link under **Select a document type** in the Content Editor window. The Amendment pop-up window opens.

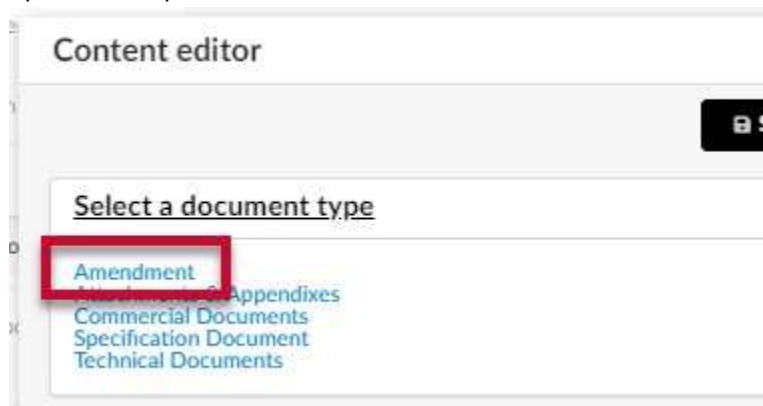


Figure 7: The Amendment link in the Content Editor.

10. Enter all required information in the fields. Fields marked with a red asterisk (*) indicate required fields.
11. Make sure you click the **Status** field and select **Approved** from the drop-down menu. This step is important because you cannot send the Amendment notification to Vendors unless the Status is **Approved**.

NOTE: Changing the Status from “Draft” to “Approved” makes it visible to others, or **Open**.

NOTE: The file size for uploaded documents must be less than 300,000 KB.

The screenshot shows the 'Amendment' window with a title 'Amendment 1' and a language 'en'. The 'Information' section has a 'Status' drop-down menu with options: 'Drafted', 'To be Approved', 'Approved', and 'Blocked'. The 'Approved' option is highlighted with a red box and a red arrow pointing to it. The 'Solicitation' section shows 'IFB Test 1 JS'.

Figure 8: The Status drop-down menu and the Approved option.

12. Click the **Click or Drag to add files** button to add files from your computer. You can also drag files to the button to upload them. Repeat this step as many times as needed. Your added document(s) display below this button.

The screenshot shows the 'Information' section with 'Status' set to 'Approved'. Below it, the 'Document' section has a '300,000 kb limit' and a language 'English'. A red box highlights the 'Click or Drag to add files' button. Below this button, a file 'EN - Buyer QRG Template Award Vendor Responses.docx' is listed.

Figure 9: The Click or Drag to add files button.

13. Click the **Save & Close** button at the top of the Amendment window.

14. Click the **Setup** subtab and click the **Save** button at the top of the page.

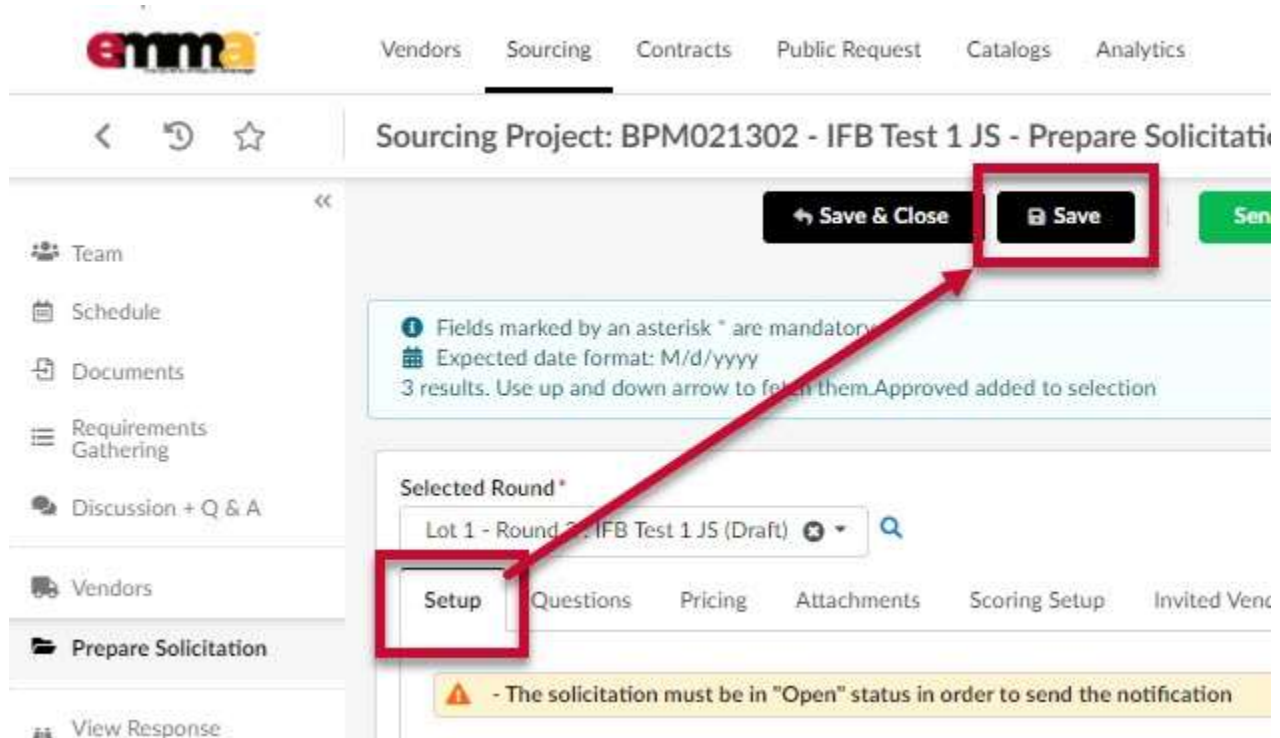


Figure 10: The Setup tab and the Save button for an Amendment.

15. Click the green **Send** button along the top of the page to send the new round immediately. A pop-up window opens and lists all added Vendors selected in the Vendors tab. Scroll to the bottom to see an example of the email notification that is sent to Vendors and adjust if necessary.



Figure 11: The green Send button at the top of an Amendment.

16. At the top of the window, click the **Solicitation Attachment** checkbox to add any Amendment documents to the notification sent out to Vendors. Below that, make sure the checkbox is selected above the **Company Name** link

to make sure all Vendors get the notification.

Click to add attachments

Select all Vendors

Files to attach

Solicitation Attachments

Send to

Company Name

Sending modes

User

Contact

.R.C.S. Plumbing llc

Email

Send

Send and close

Figure 12: The checkbox to add attachments and to select all vendors for your message.

17. Click the **Send and close** button in the pop-up window. A prompt appears asking for confirmation to notify Vendors. Click **OK**. This sets up the notification to Vendors regarding the Amendment and changes the Amendment status from “Draft” to “Open”.

Solicitation: IFB Test 1 JS

Send

Send and close

Files to attach

Solicitation Attachments

Figure 13: The Send and close button for the Amendment message.

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

emma

Vendors Sourcing Contracts Public Request Catalogs Analysis

Sourcing Project: BPM021302 - IFB Test 1 JS - Prepare

Save & Close

Save

Notify Co

Team

Schedule

Documents

Requirements Gathering

Fields marked by an asterisk * are mandatory

Expected date format: M/d/yyyy

Selected Round *

Lot 1 - Round 2 - IFB Test 1 JS / Draft

Figure 14: The Save button at the top of an Amendment.

19. Click the **Notify Commodity Vendors** button at the top of the page. Click **OK** at the prompt.



Figure 15: The Notify Commodity Vendors button at the top of an Amendment.

20. Click the **Publish Notification** button and click **OK** at the prompt.

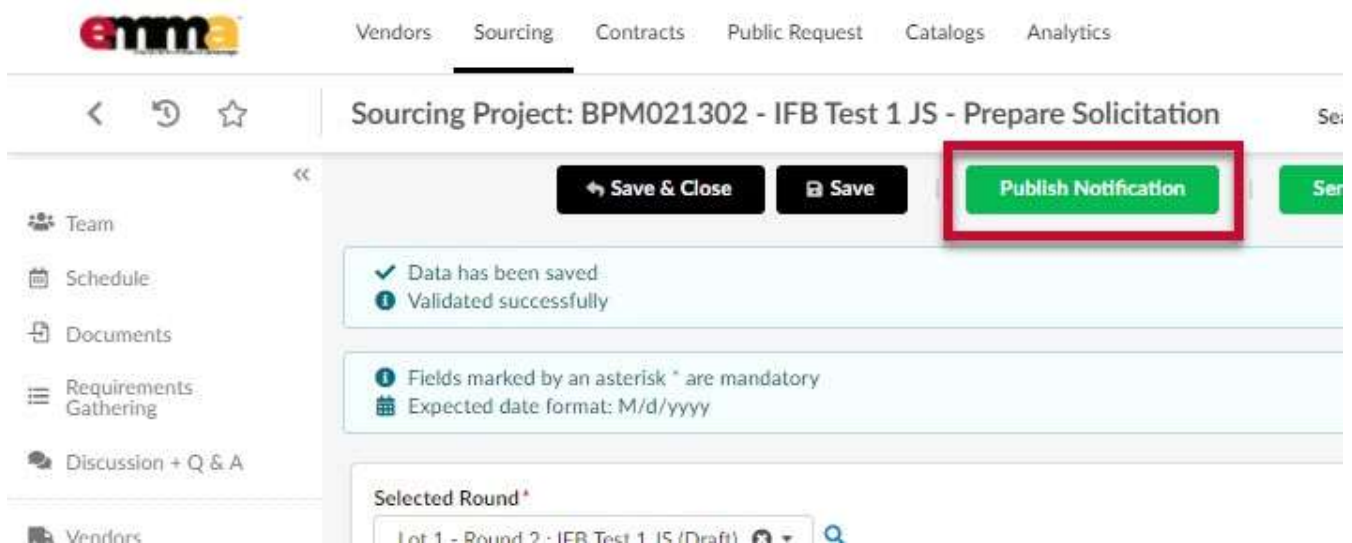


Figure 16: The Publish Notification button at the top of an Amendment.

21. (Optional) If this is a Cancellation Amendment, click the **Project info** tab on the left-hand panel.

NOTE: You must first make a new round to make a Cancellation Amendment.

- Add the word **"Cancelled"** to the Sourcing Project Title.
- Click the **Save** or **Save & Close** buttons.
- Contact the eMMA helpdesk to change the project's status from "In Progress" to "Cancelled."