

Create an Amendment or Cancel a Sourcing Project 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 properly cancel a solicitation in eMMA and notify Vendors.

- [Create an Amendment](#)
- [Cancel a Sourcing Project via an Amendment](#)

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

If you need help at any time, email the eMMA Help Desk at emma.helpdesk@maryland.gov.

Step-by-Step Instructions

Create an Amendment

1. Access 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.

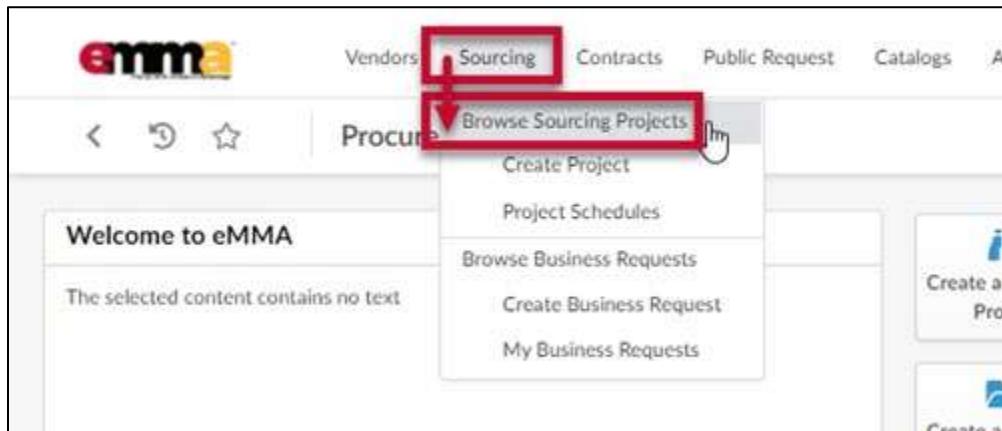


Figure 1: The Sourcing tab and the Browse Sourcing Project option in eMMA.

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



Project List		
ID	Project	Type
	PM021302 IFB Test 1 JS	IFB: Invita Bid (LP)
	BPM021301 MMIS II IV&V Masters (created 10/22/20)	Secondary Competiti
	BPM021299 Juniper MITDP VoIP Upgrades	Secondary

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

4. Click the **Prepare Solicitation** tab in the left-hand side-panel.
5. 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.

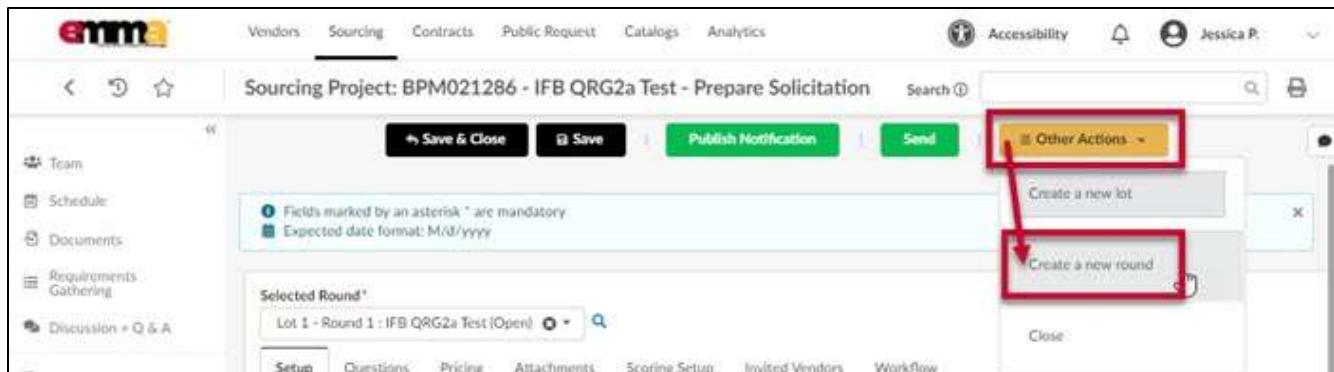


Figure 3: The Other Actions button and the Create a new round option.

6. 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)

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
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1 Result(s)

Tabs to be duplicated

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

Action plan	<input type="radio"/> Don't copy	<input type="radio"/> Copy from template	<input checked="" type="radio"/> 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.

7. 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 adding Amendment type documentation.

Workflow

Award & Contract

Status: Draft

Round #: 2

Lot #: 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

Solicitation Type*: IFB: Invitation for Bid

Summary:

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

8. 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.
9. On the Prepare Solicitation page, click the **Attachments** subtab and click the **Create a Document** button. The Content editor pop-up window opens.

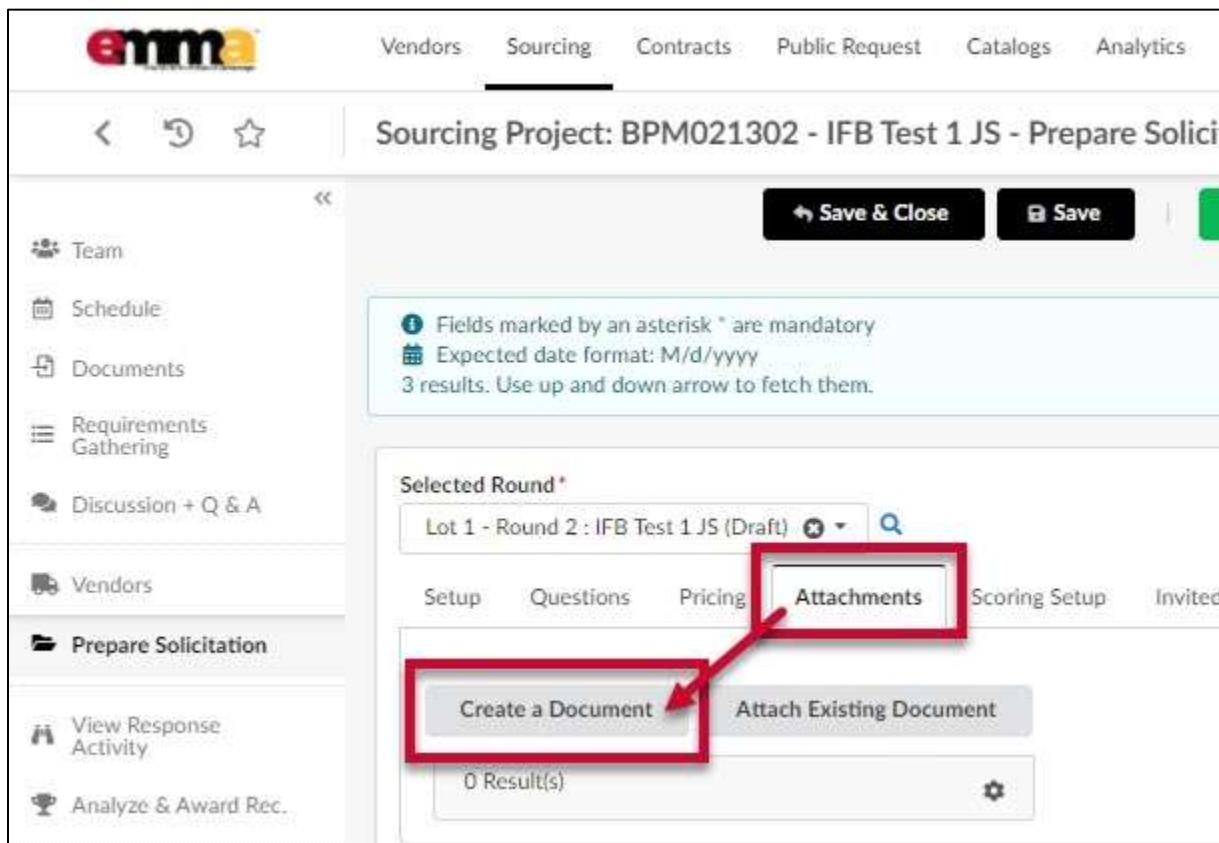


Figure 6: The Attachments tab and the Create a Document button in the Prepare Solicitation side tab.

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

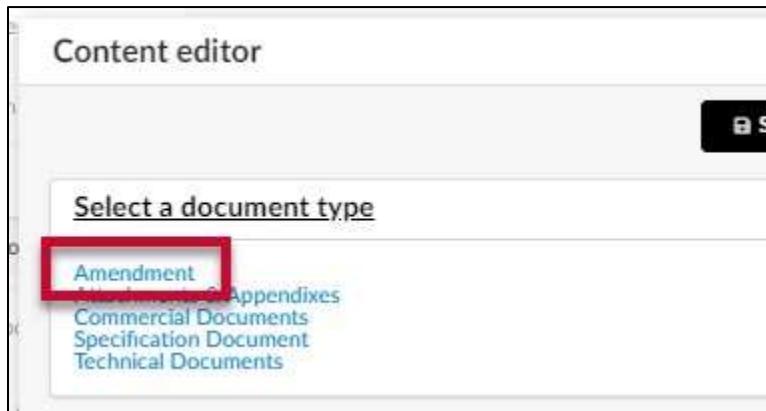


Figure 7: The Amendment link in the Content Editor.

11. Enter all required information in the fields. Fields marked with a red asterisk (*) indicate required fields.
12. 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.

Amendment

Save Save & Close Save & Preview

A Draft document is not visible to other users. Changing the status to Approved makes it visible to others.

Title	Information
Title * Amendment 1	Status * Drafted Approved To be Approved Blocked
Summary	Solicitation IFB Test 1 JS

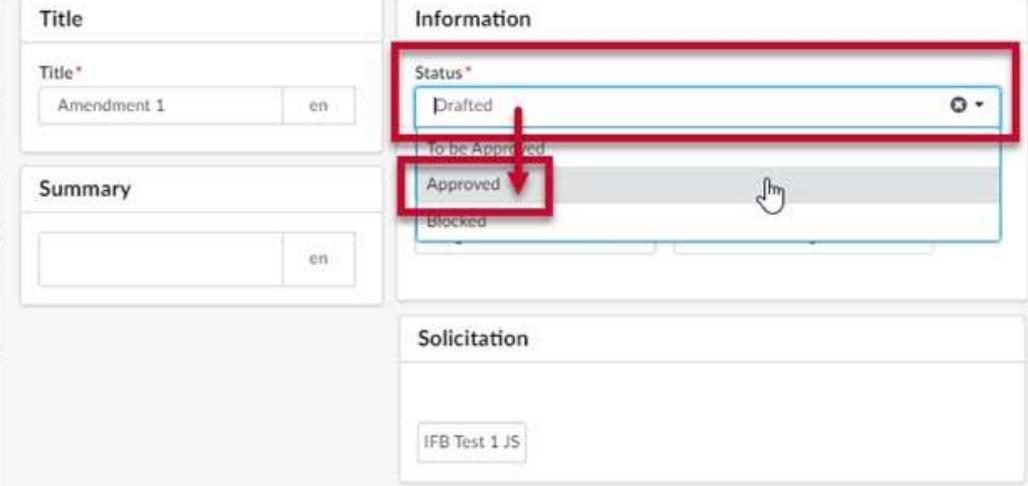


Figure 8: The Status drop-down menu and the Approved option.

13. 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.

Information

Status *
Approved

Document ① *
300,000 kb limit.

English

Click or Drag to add files

EN - Buyer QRG Template Award Vendor Responses.docx

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

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

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

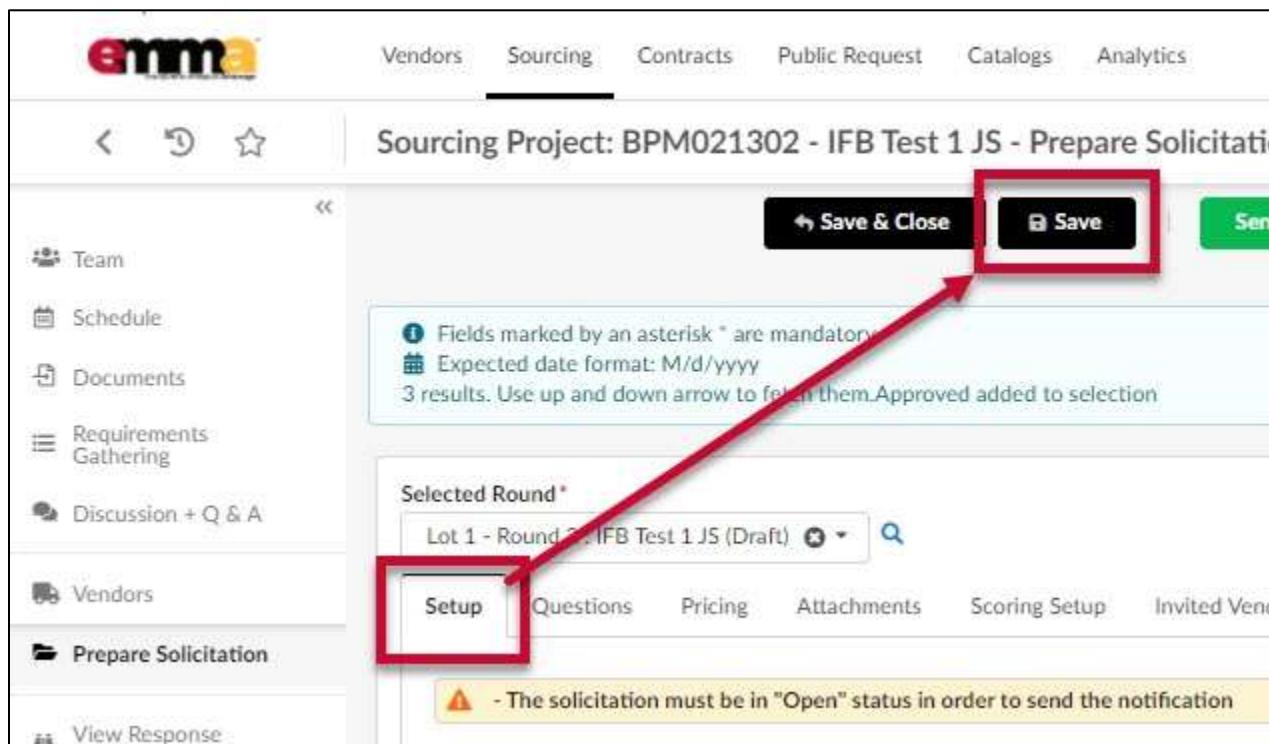


Figure 10: The Setup tab and the Save button for an Amendment.

16. 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.

17. 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.

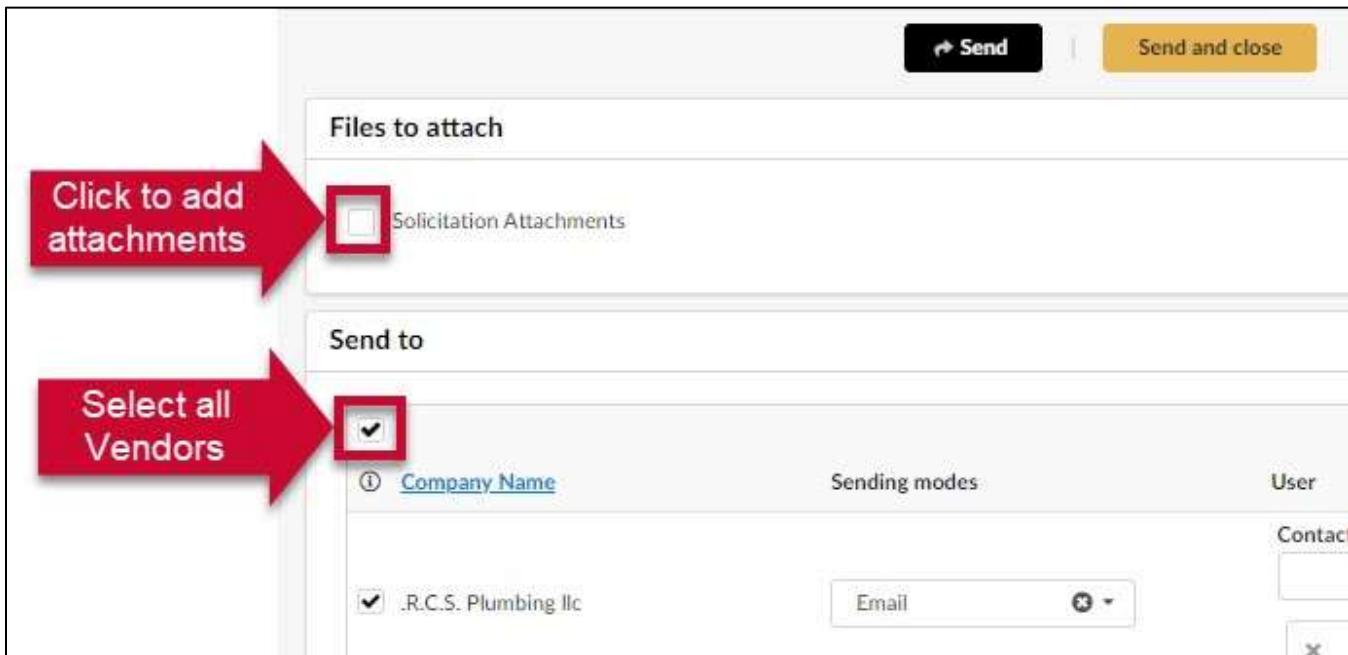


Figure 12: The checkbox to add attachments and to select all vendors for your message.

18. 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".



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

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

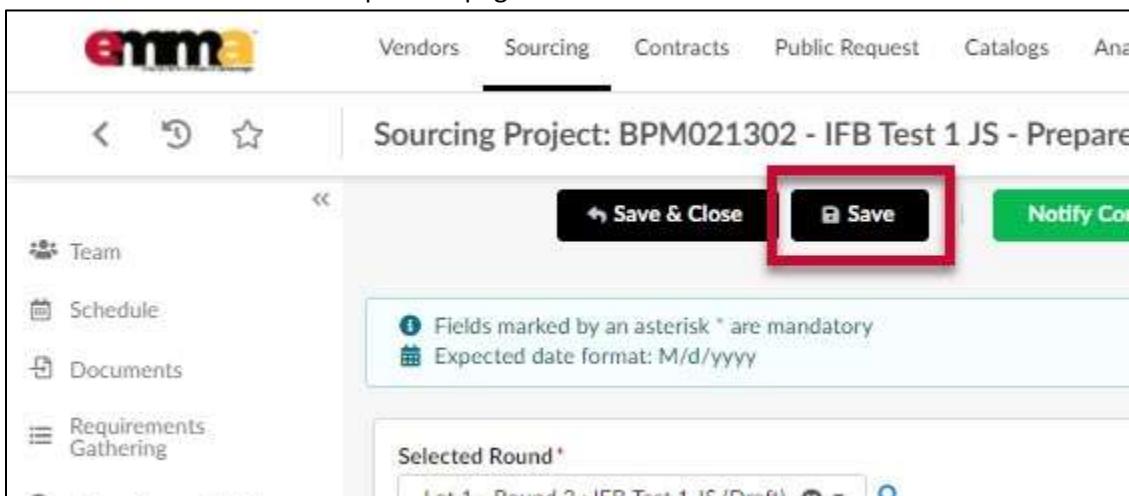


Figure 14: The Save button at the top of an Amendment.

20. 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.

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

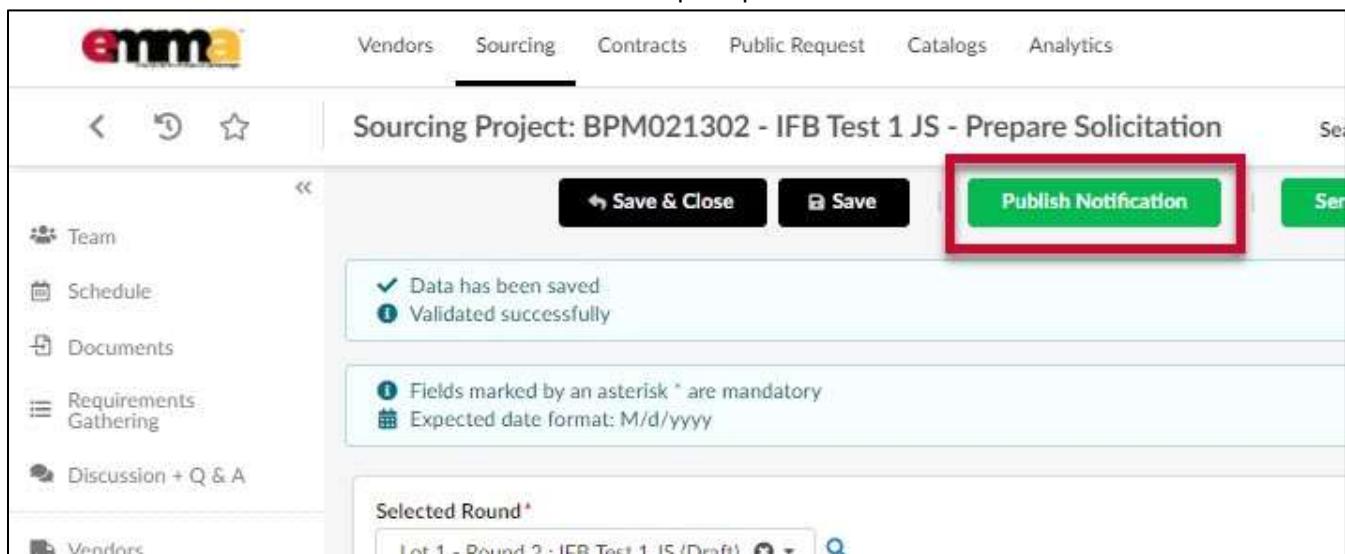


Figure 16: The Publish Notification button at the top of an Amendment.

Your new amendment/round for your solicitation is now open. The previous amendment/round is now closed.

Cancel a Published Solicitation

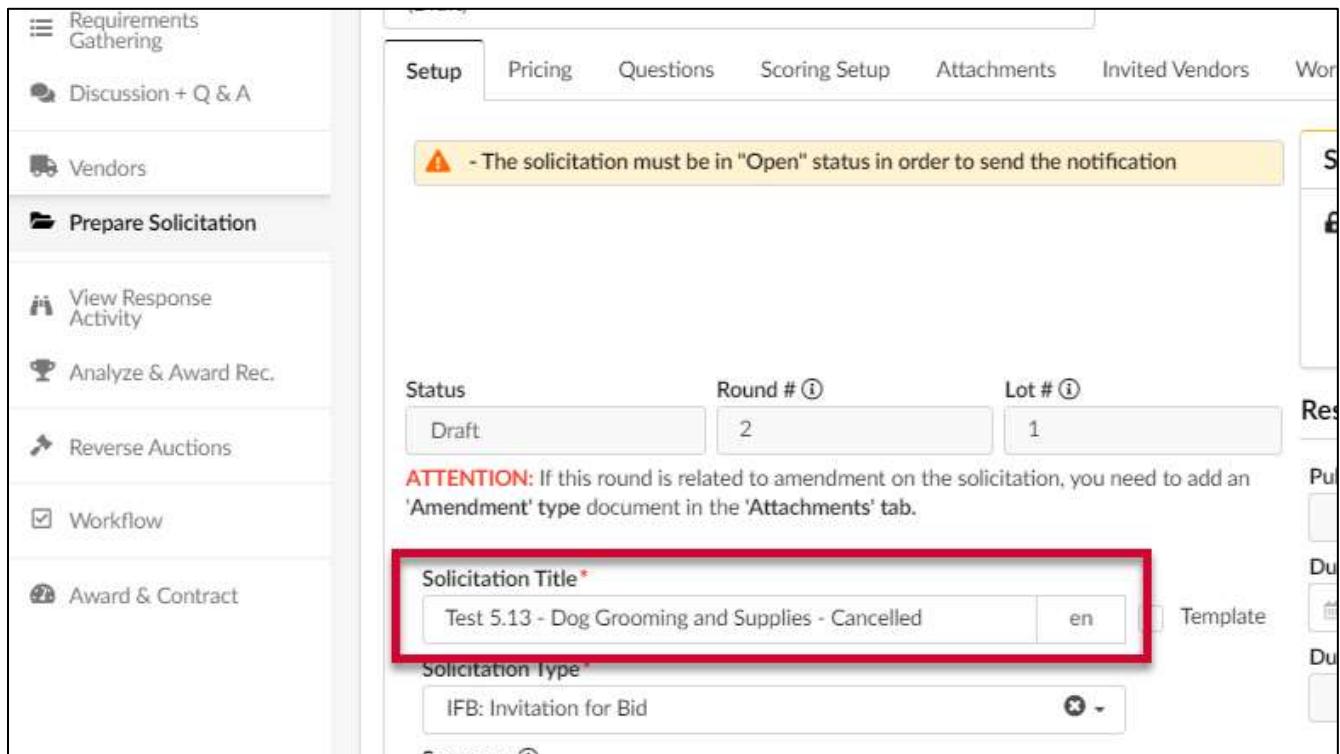


IMPORTANT!! To cancel a published Solicitation, **you must first create an Amendment and follow these instructions.** This notifies Vendors of the cancelled Solicitation, and lets others see that the Solicitation is cancelled.

16. Follow Steps 1-15 in the above process.

17. Click the **Prepare Solicitations** tab on the left-hand side-panel.

18. Click the **Solicitation Title** field to edit the title and add “Cancelled” to the end of the solicitation title.



The screenshot shows the 'Prepare Solicitation' tab selected in the left sidebar. The main area has a yellow warning box at the top stating: "⚠ - The solicitation must be in 'Open' status in order to send the notification". Below this, there are fields for 'Status' (set to 'Draft'), 'Round # (i)' (set to '2'), and 'Lot # (i)' (set to '1'). A red box highlights the 'Solicitation Title' field, which contains the text 'Test 5.13 - Dog Grooming and Supplies - Cancelled'. Below this is the 'Solicitation Type' field, which is set to 'IFB: Invitation for Bid'.

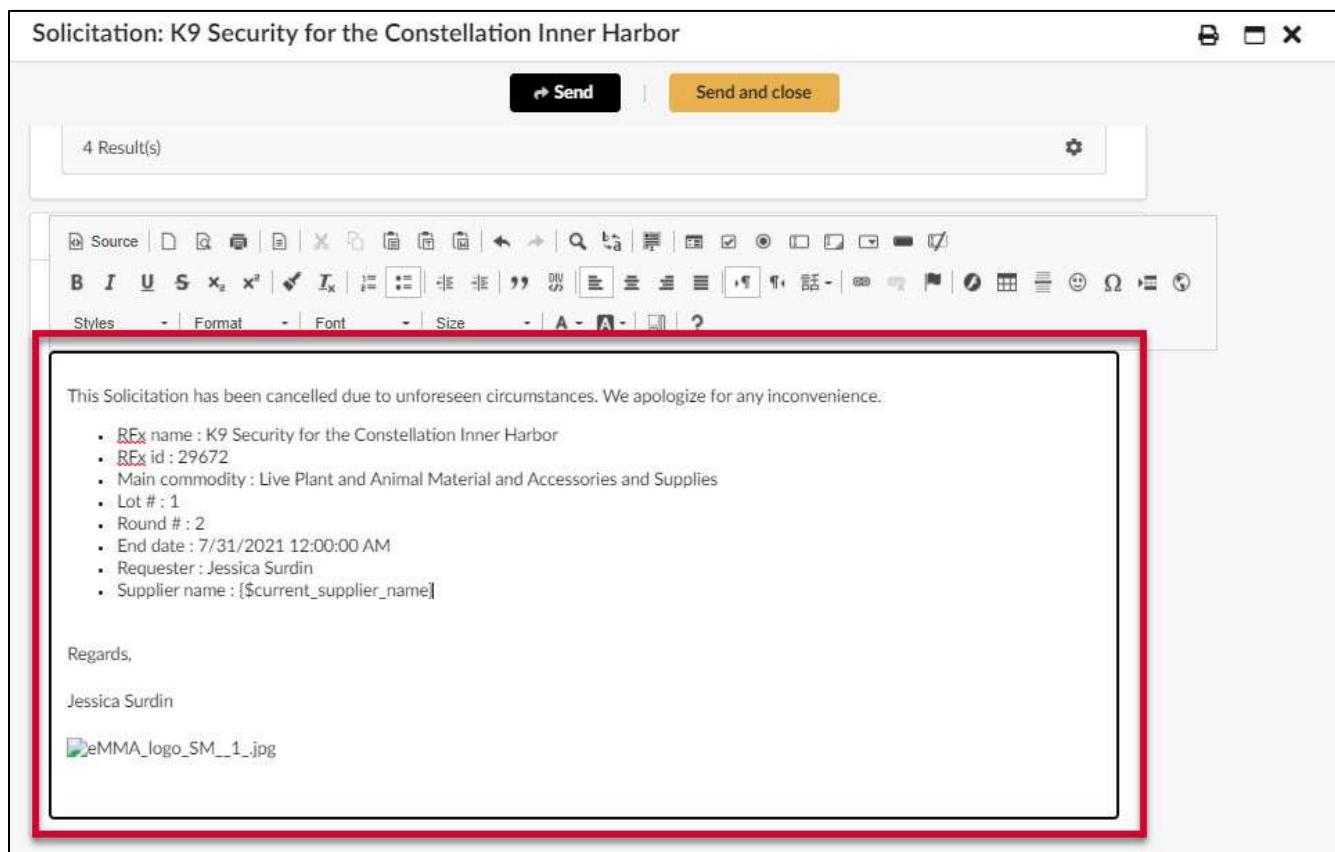
19. Click the green **Send** button along the top of the page to send the new round immediately. A pop-up window opens and lists all added Vendors selected in the Vendors tab.



The screenshot shows the 'Sourcing Project' page for 'BPM021302 - IFB Test 1 JS - Prepare Solicitation'. The top navigation bar includes 'Vendors', 'Sourcing' (which is active), 'Contracts', 'Public Request', 'Catalogs', and 'Analytics'. The right side of the header has an 'Accessibility' link. The main content area shows a 'Save & Close' button, a 'Save' button, a 'Notify Commodity Vendors' button, and a red box highlighting the 'Send' button. Below these buttons is a note: 'Fields marked by an asterisk * are mandatory' and 'Expected date format: M/d/yyyy'.

Figure 17: The green **Send** button at the top of an Amendment.

20. Scroll to the bottom of the pop-up window to see an example of the email notification that is sent to Vendors.
21. Click the main body of the email to edit the message text and provide a brief explanation of why this Solicitation is cancelled.



22. At the top of the window, click the **Solicitation Attachments** checkbox to add Cancellation 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 invited Vendors get the notification.

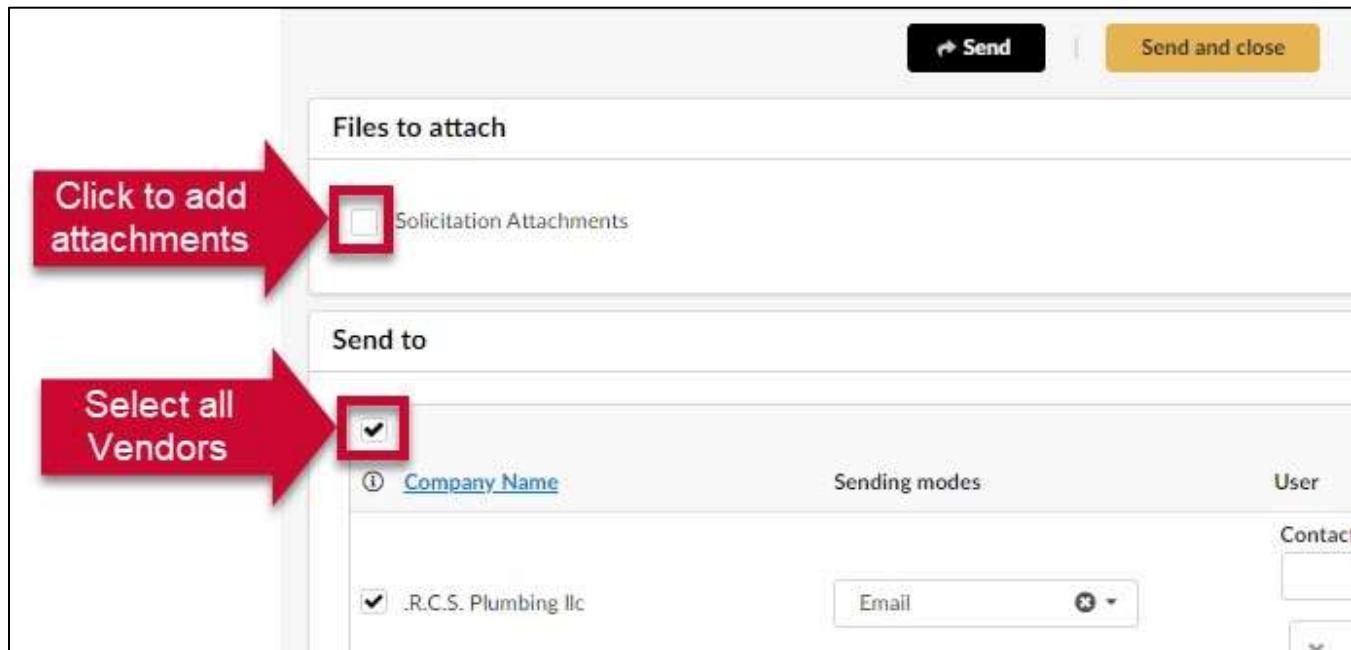


Figure 18: The checkbox to add attachments and to select all vendors for your message.

23. 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”.



Figure 19: The Send and close button for the Amendment message.

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

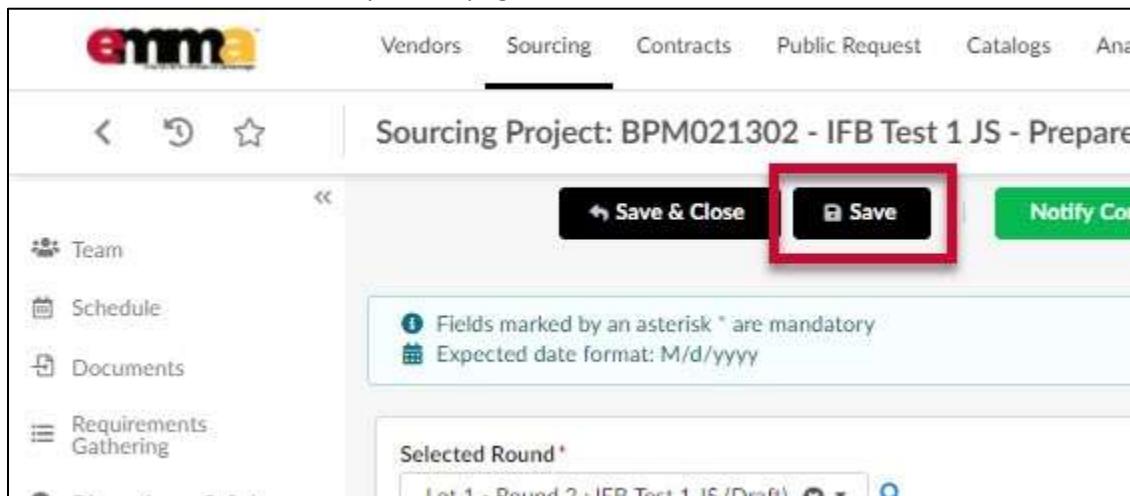


Figure 20: The Save button at the top of the page

If you browse for your Solicitation, the new title displays in the list, however the solicitation still shows “In progress”.

BPM021920	Constellation Inner Harbor	Envelope Proposal (LP)	General Services	Material and Accessories and Supplies	In progress	
BPM021918	K9 Security for the Constellation Inner Harbor Cancelled	RFP: Double Envelope Proposal (LP)	Department of General Services	Live Plant and Animal Material and Accessories and Supplies	In progress	
BPM021916	Test JS PN	Public Notice	Department of	Dogs	Apparent Awardee	

Figure 21: An In progress Solicitation with “Cancelled” in the title.

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



Figure 22: The Notify Commodity Vendors button at the top of an Amendment.

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

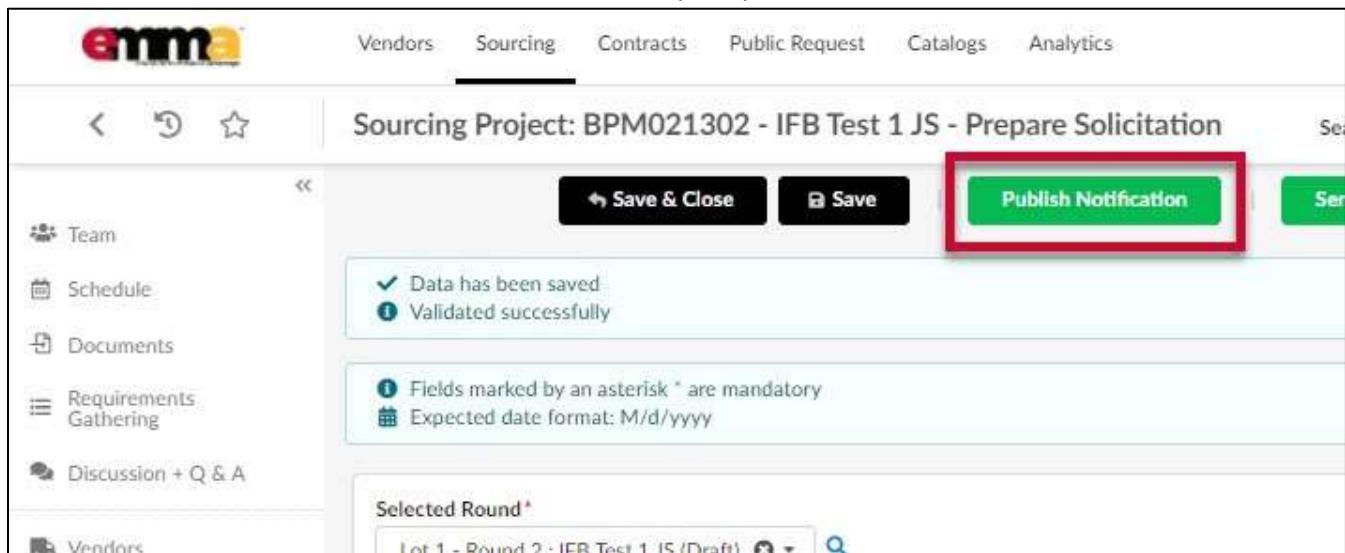


Figure 23: The Publish Notification button at the top of an Amendment.

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

28. Click the **Project Info** tab on the left-hand side-panel.

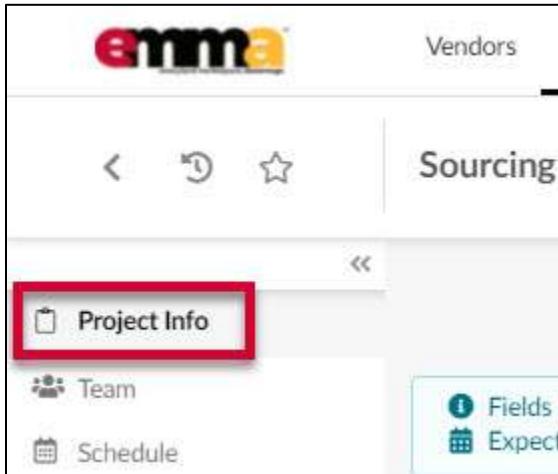


Figure 24: The Project Info tab.

29. Click the **Cancel Project** button in the drop-down menu. A prompt opens asking you to confirm that you want to cancel the Solicitation.

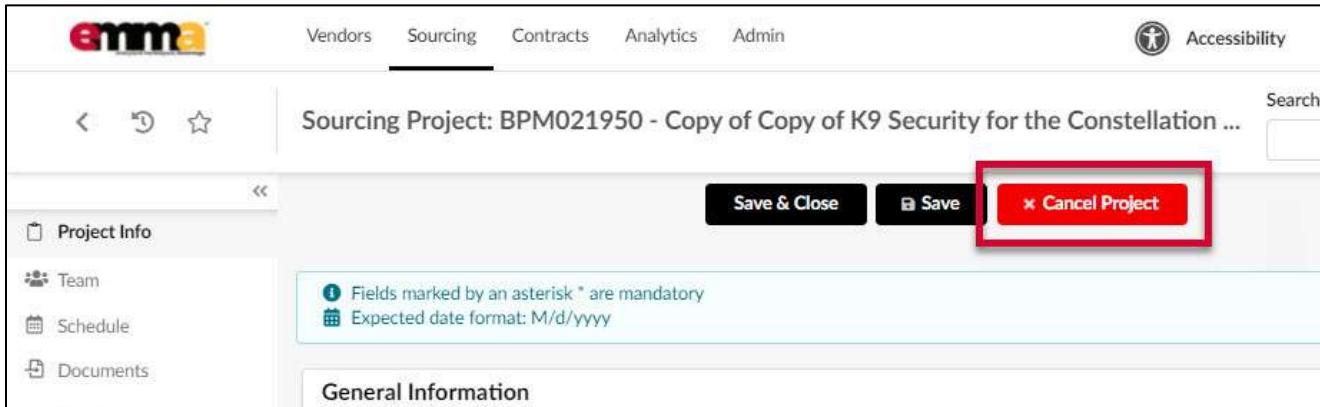


Figure 25: The Cancel Project button for a published solicitation.

If you do not see the Cancel Project button, click the **Other Actions** button at the top of the page to open a drop-down menu and select the **Cancel Project** option.

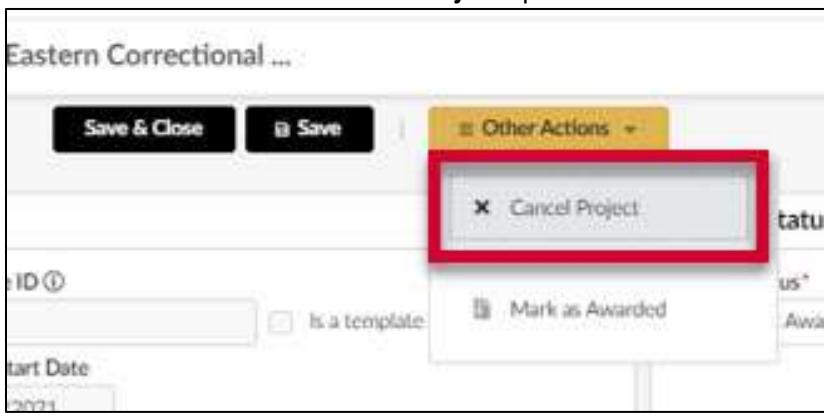
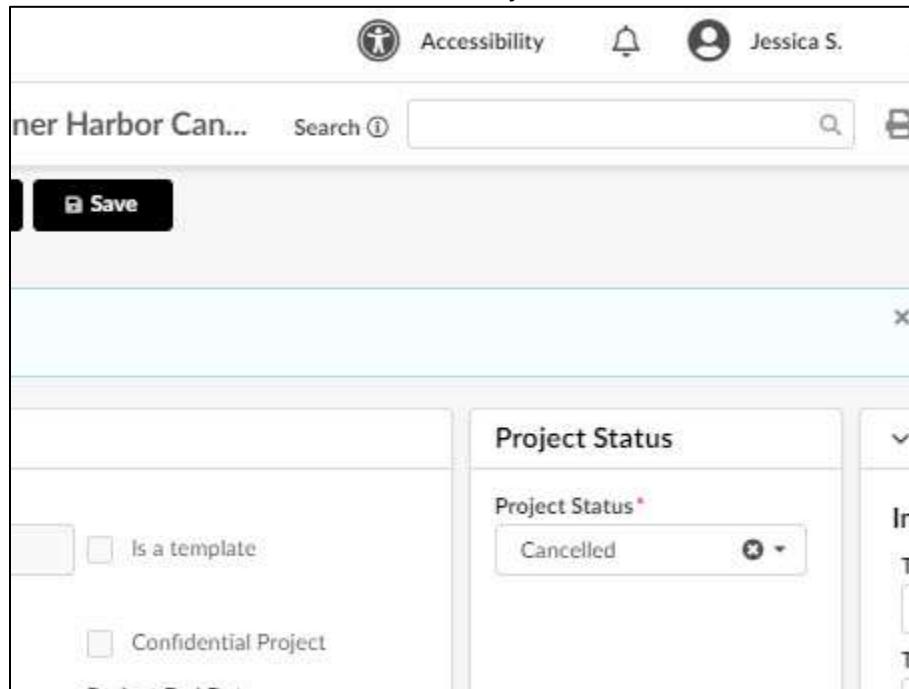


Figure 26: The Cancel Project button in the Other Actions drop-down menu.

28. Click the **OK** button in the prompt to cancel your published Solicitation. The page refreshes.

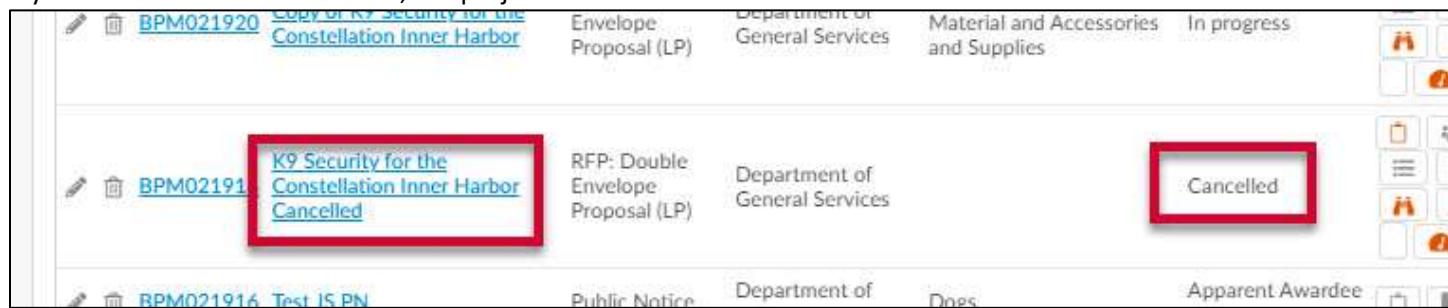
Your Solicitation is now cancelled. The Project Status now shows as **Cancelled**.



A screenshot of a web-based application interface. At the top, there are user profile icons for 'Accessibility', a bell, and 'Jessica S.'. Below that is a search bar with the placeholder 'Search' and a magnifying glass icon. A large black 'Save' button is visible. The main content area is titled 'Project Status' and contains a dropdown menu labeled 'Project Status*' with the option 'Cancelled' selected. To the left of this, there are checkboxes for 'Is a template' and 'Confidential Project'. On the right, there are some partially visible text fields.

Figure 27: The Project Status in a Solicitation page shown as Cancelled.

If you browse for this Solicitation, the project status shows as Cancelled.



A screenshot of the eMMA (eProcurement Management Module) interface. It shows a list of solicitations. The first row is a header with columns: 'Solicitation ID', 'Title', 'Type', 'Department', 'Material and Accessories', and 'Status'. Below this, there are three rows of data. The second row is highlighted with a red box around the 'Title' column, which contains 'K9 Security for the Constellation Inner Harbor' and 'Cancelled'. The 'Status' column for this row is also highlighted with a red box and contains the word 'Cancelled'. The other two rows are standard entries.

Solicitation ID	Title	Type	Department	Material and Accessories	Status
BPM021920	Copy of K9 Security for the Constellation Inner Harbor	Envelope Proposal (LP)	Department of General Services		In progress
BPM02191	K9 Security for the Constellation Inner Harbor Cancelled	RFP: Double Envelope Proposal (LP)	Department of General Services		Cancelled
BPM021916	Test IS PN	Public Notice	Department of	Does	Apparent Awardee

Figure 28: A cancelled Solicitation in eMMA.