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.

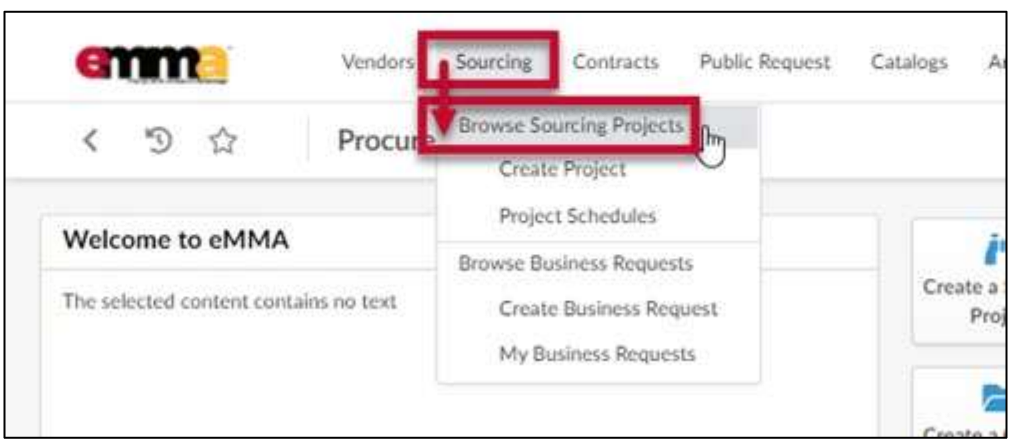


Figure 1:The Sourcing tab and the Browse Sourcing Project option in eMMA.

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

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.

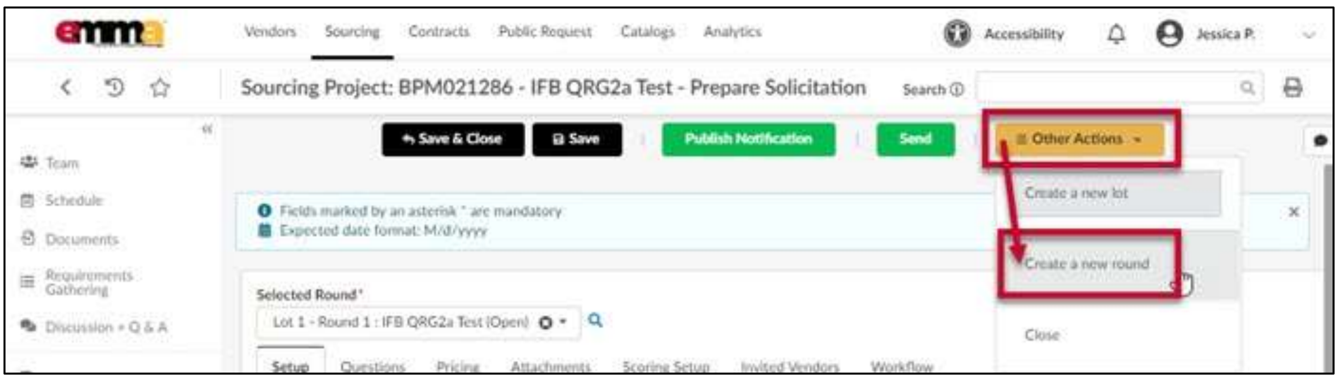


Figure 3: The Other Actions button and the Create a new round option.

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

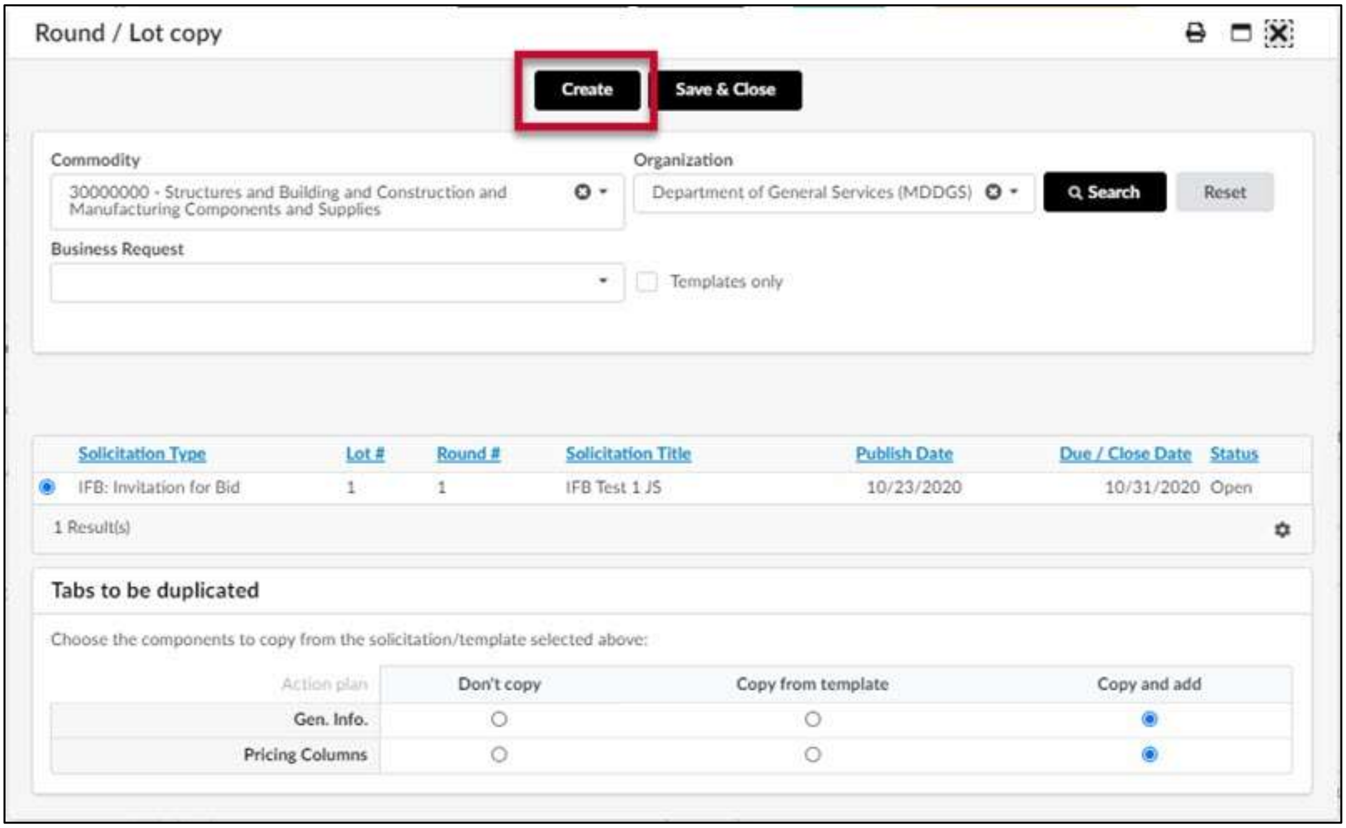


Figure 4: The Create button in the Round/Lot copy window.

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.

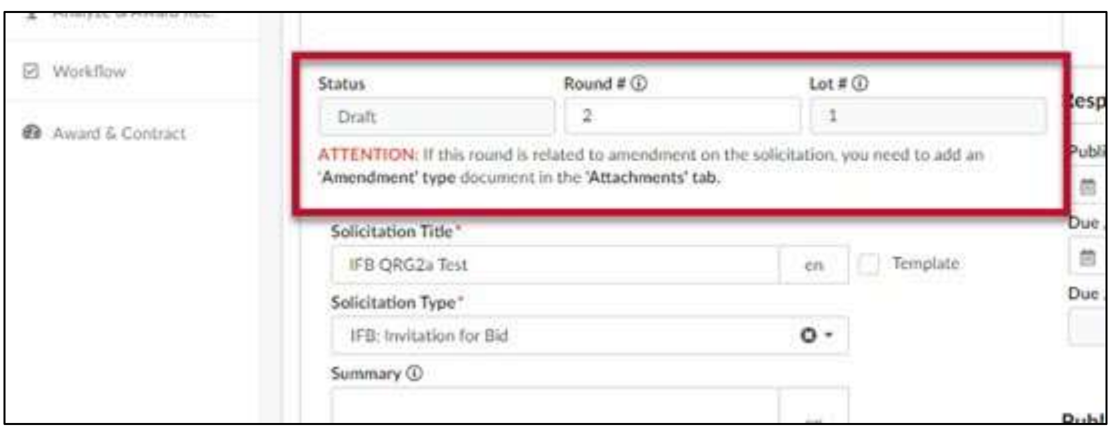


Figure 5: The created new round (Round 2) in Draft state and the attention message..

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.

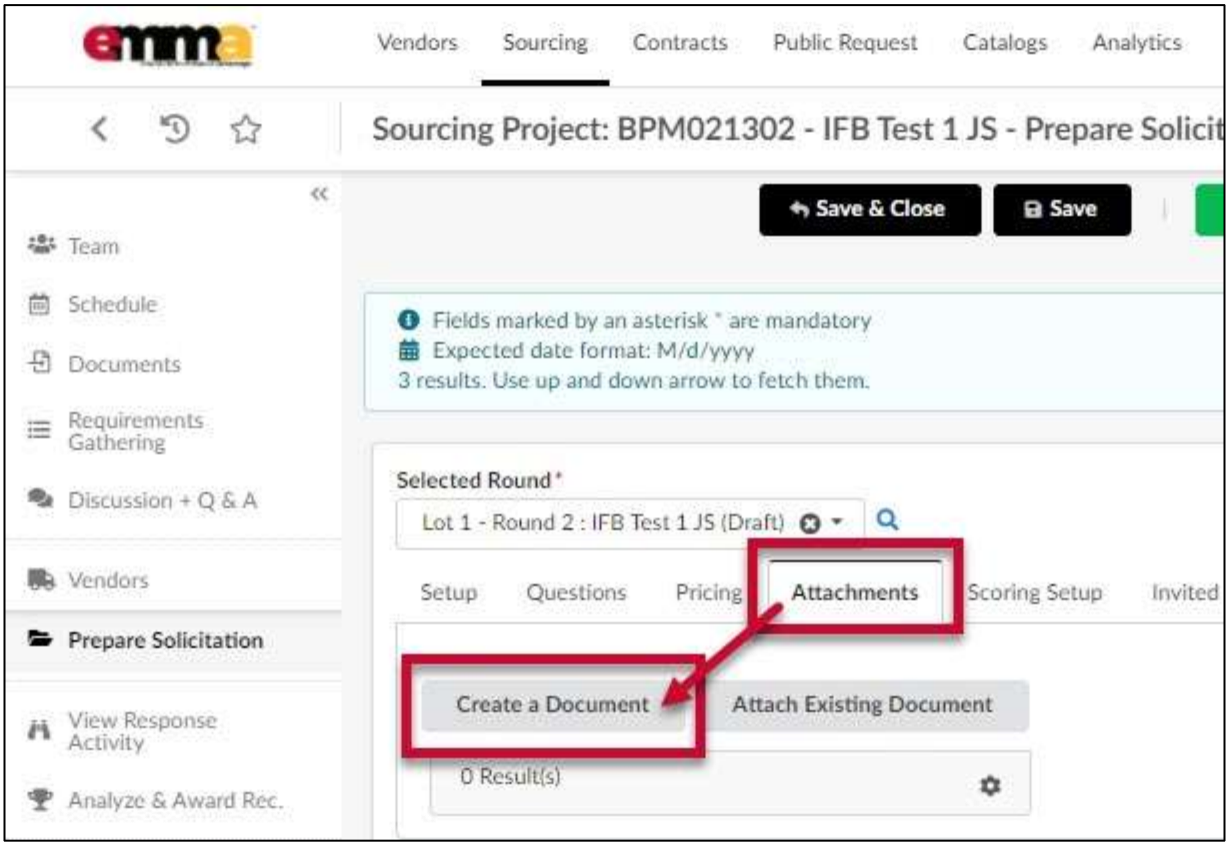


Figure 6: The Attachments tab and the Create a Document button in the Prepare Solicitation side tab.

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

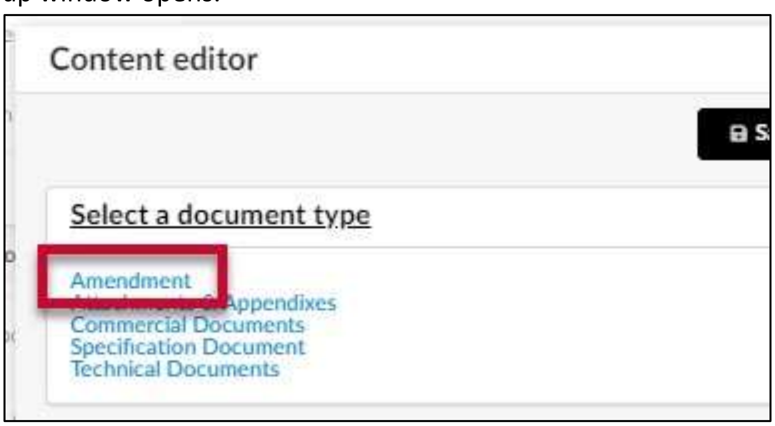


Figure 7: The Amendment link in the Content Editor.

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.

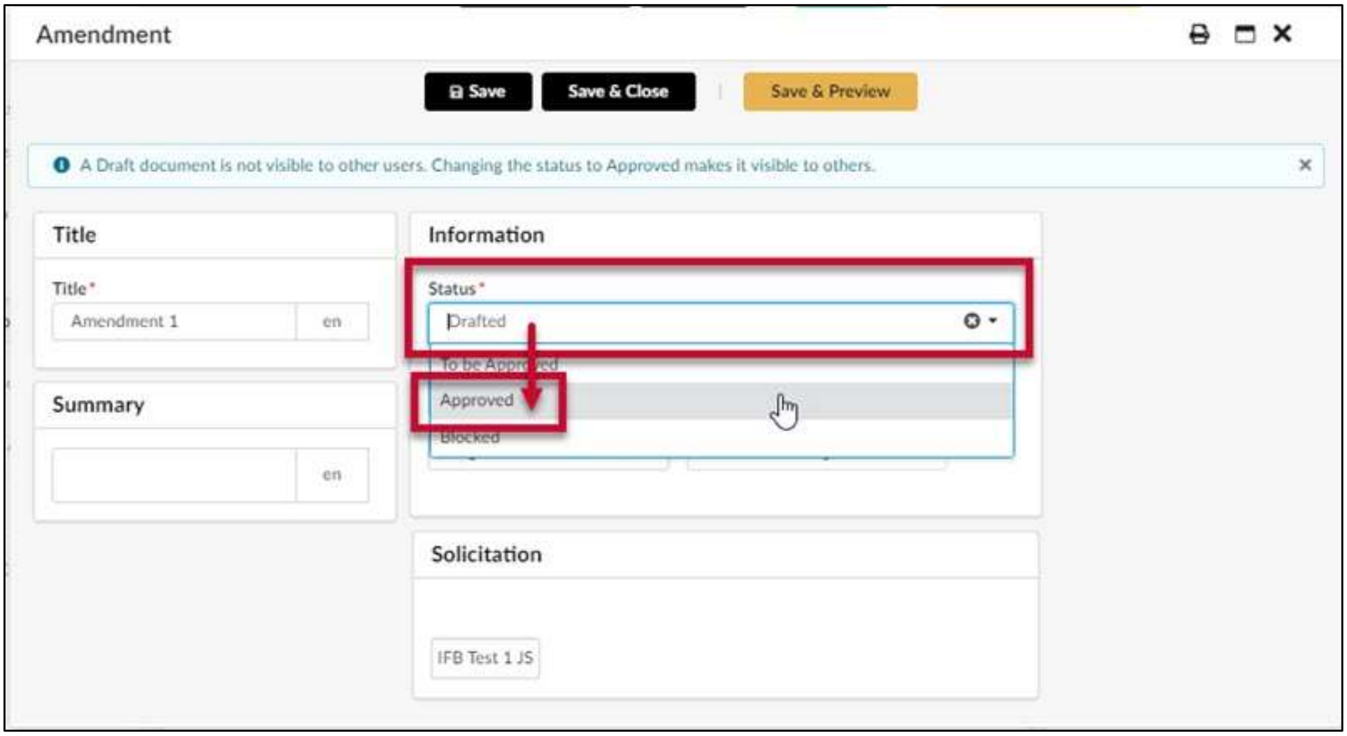


Figure 8: The Status drop-down menu and the Approved option.

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.

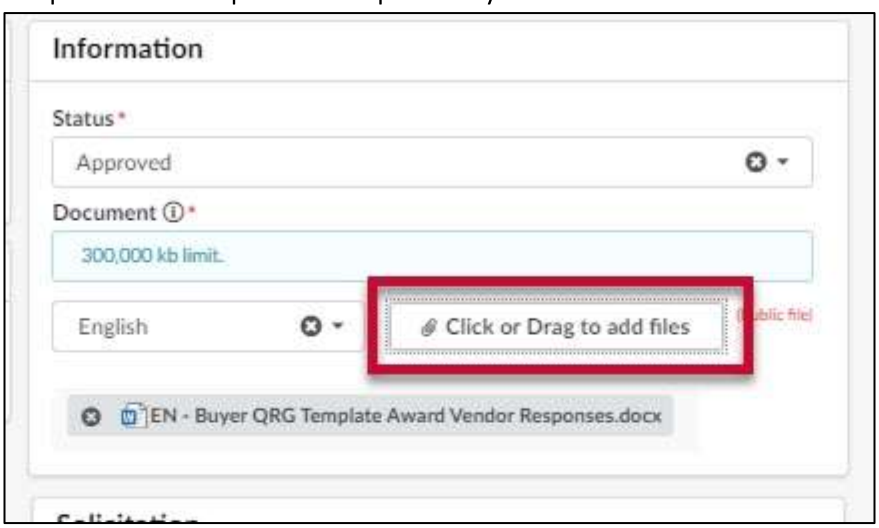


Figure 9: The Click or Drag to add files button.

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.

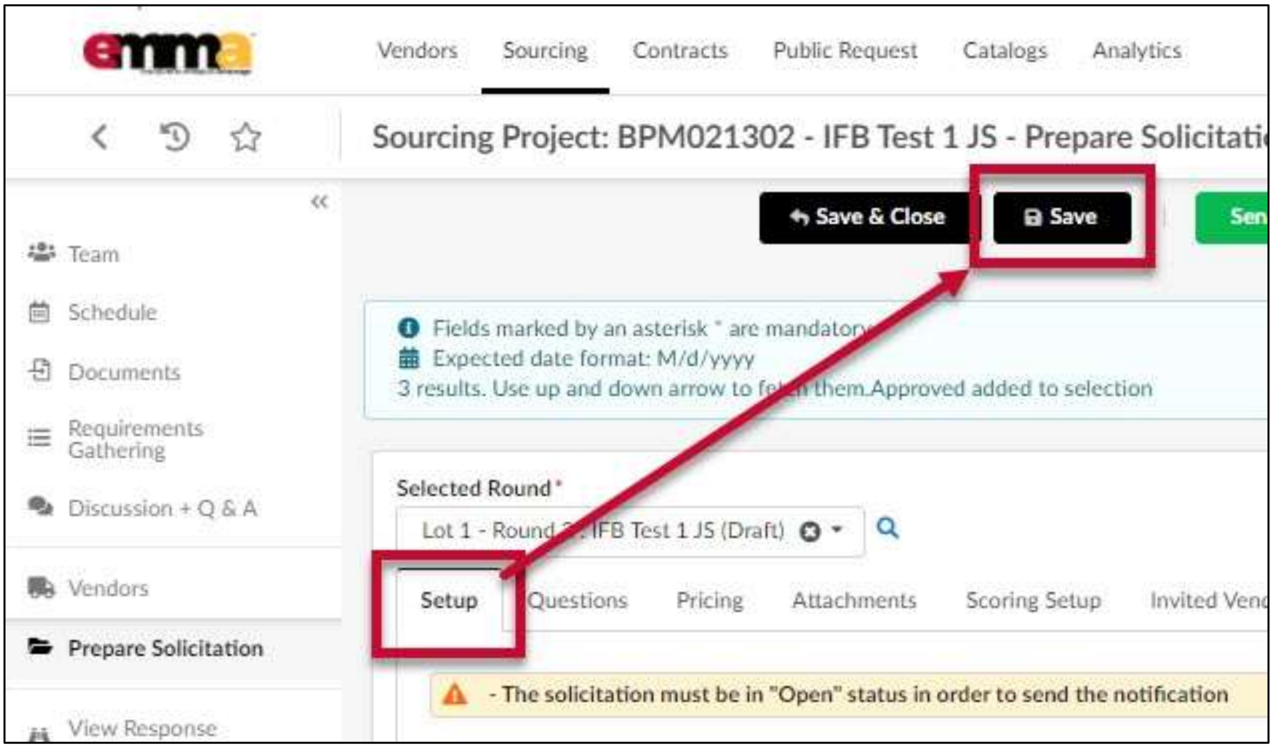


Figure 10: The Setup tab and the Save button for an Amendment.

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.

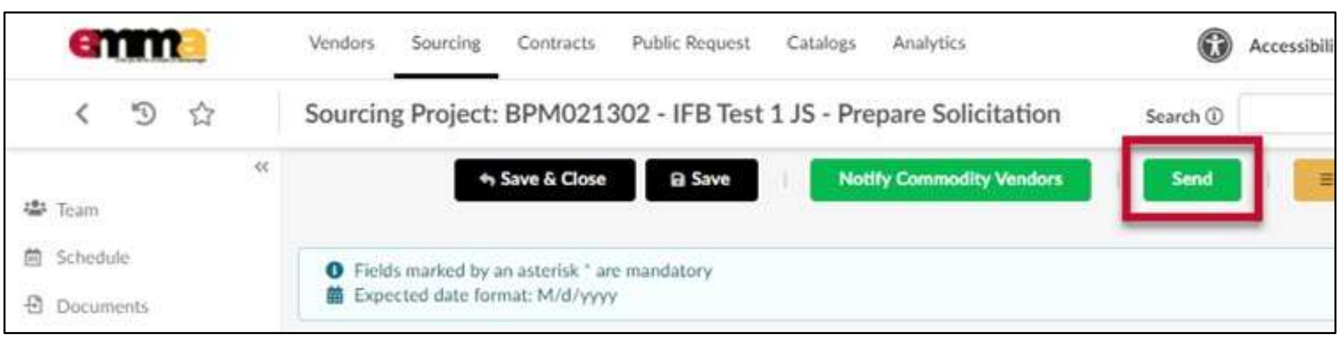


Figure 11: The green Send button at the top of an Amendment.

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.

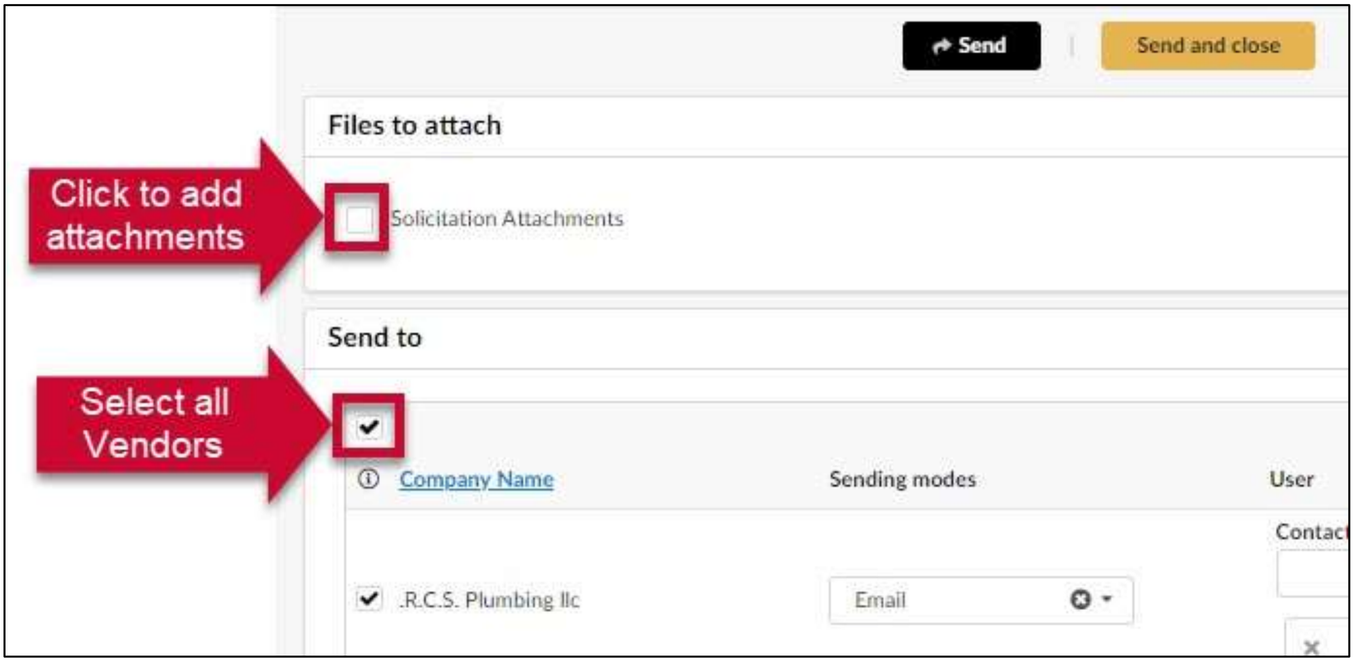


Figure 12: The checkbox to add attachments and to select all vendors for your message.

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.

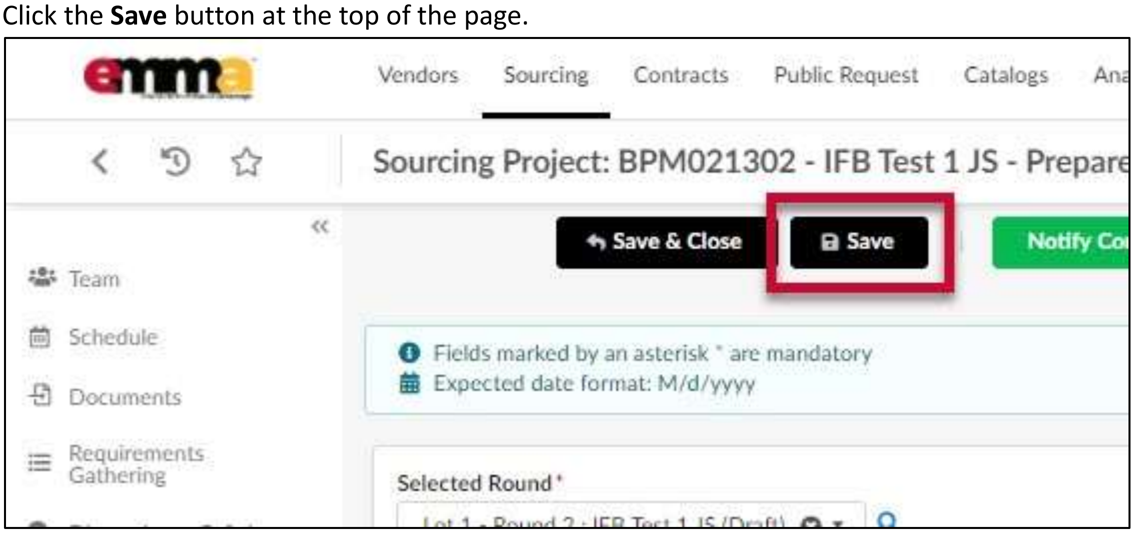


Figure 14: The Save button at the top of an Amendment.

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.

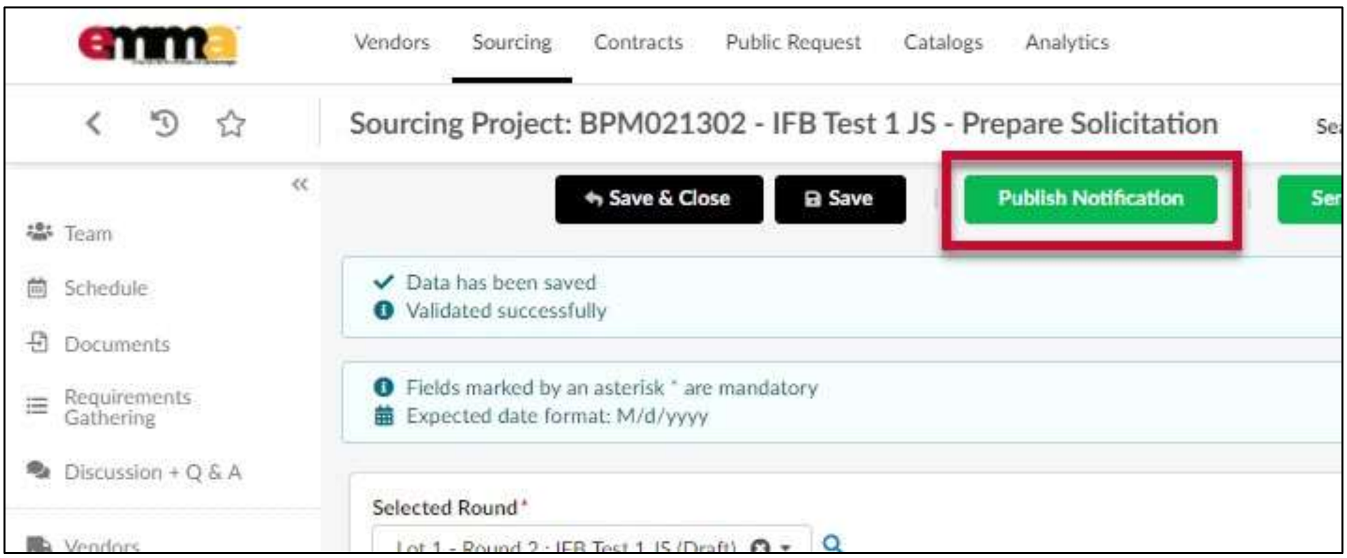


Figure 16: The Publish Notification button at the top of an Amendment.

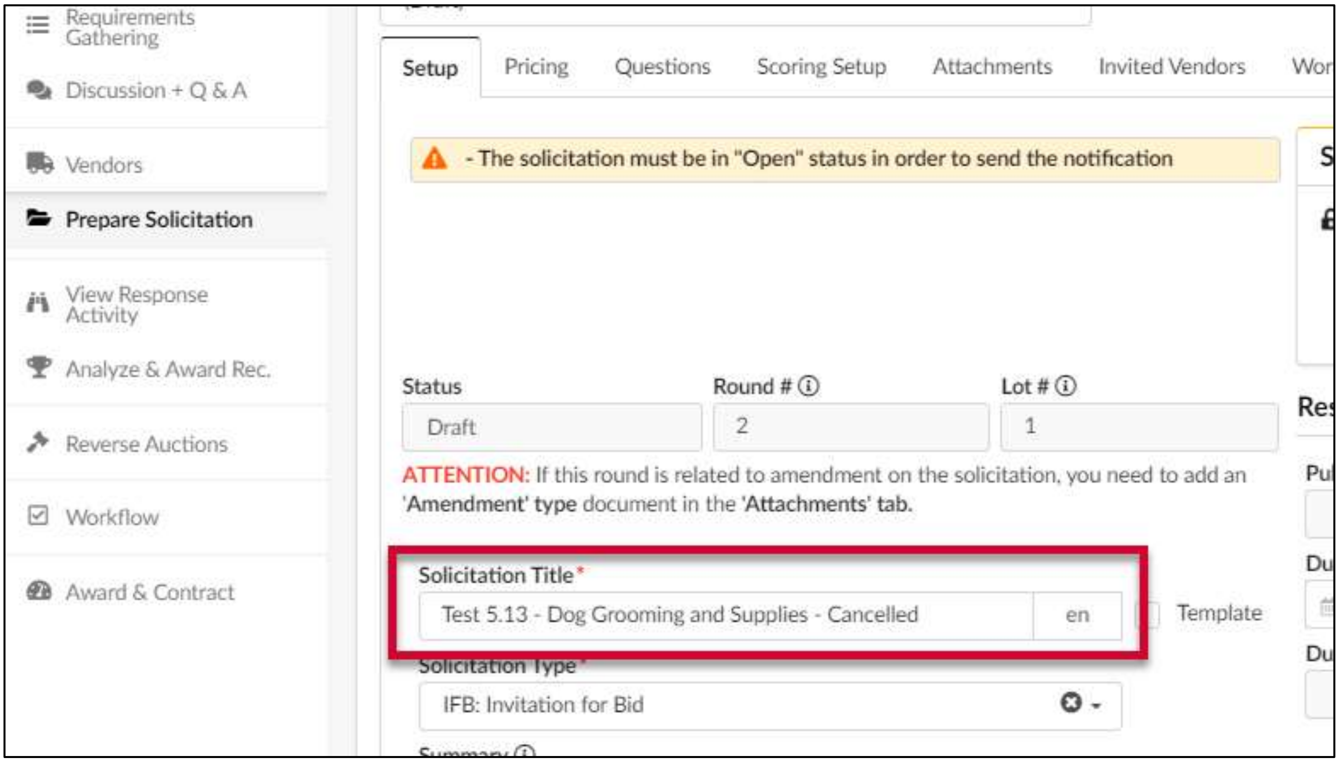
Your new amendment/round for your solicitation is now open. The previous amendment/round is now closed.

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.



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.

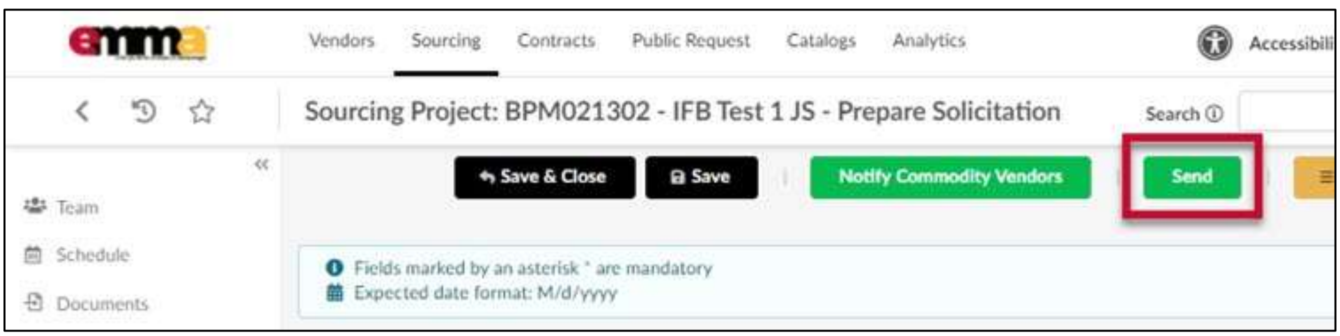
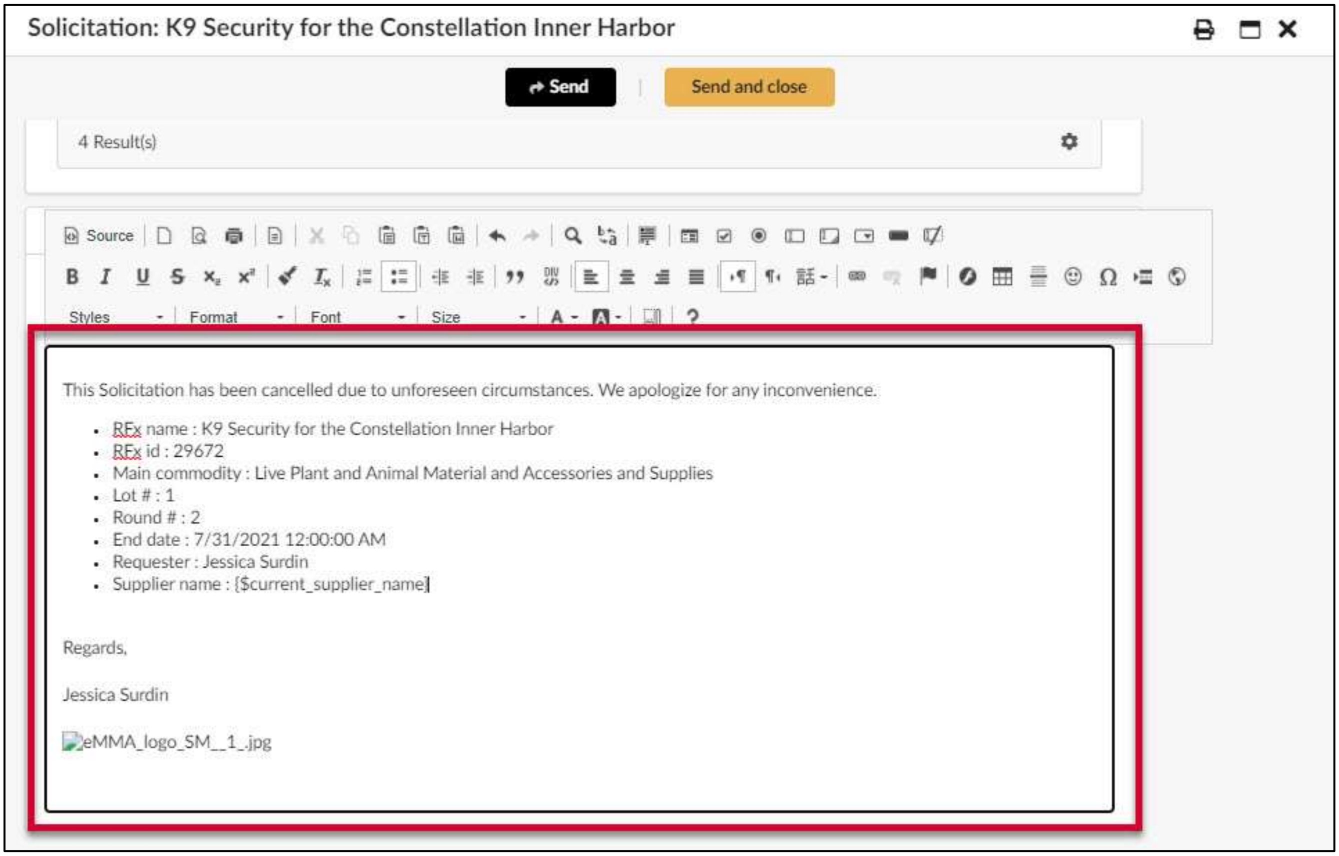


Figure 17: The green Send button at the top of an Amendment.

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.

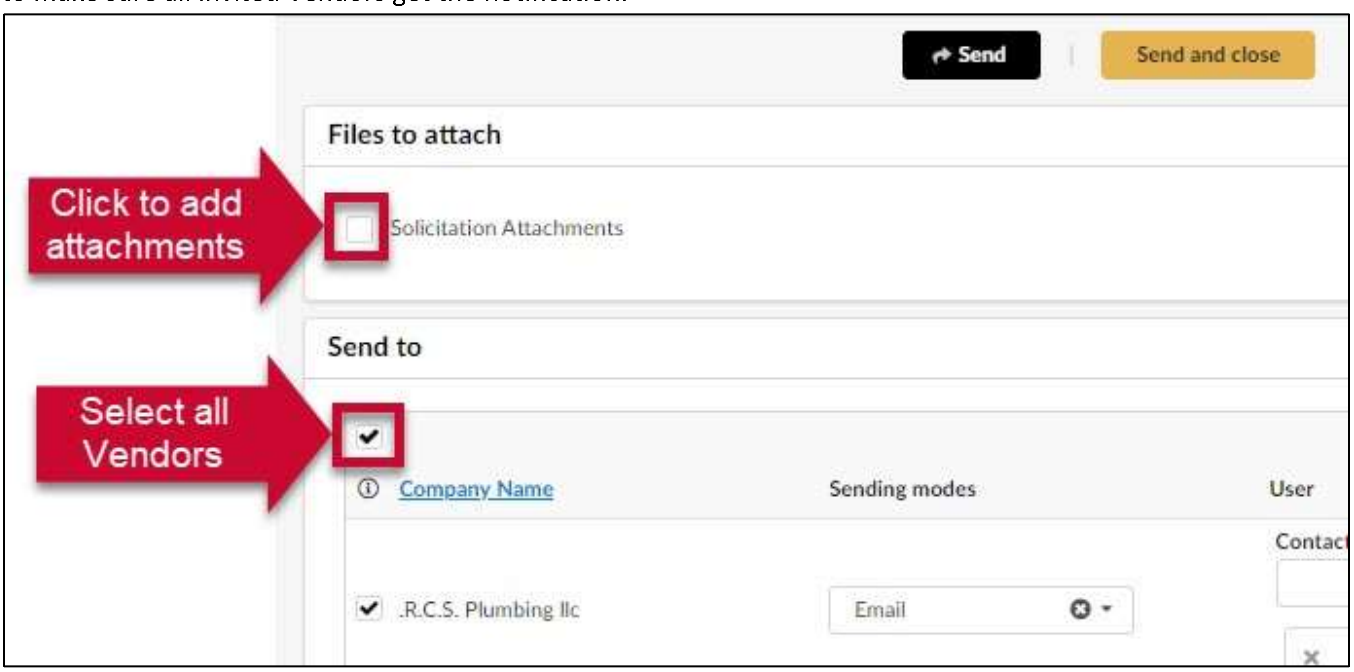


Figure 18: The checkbox to add attachments and to select all vendors for your message.

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.

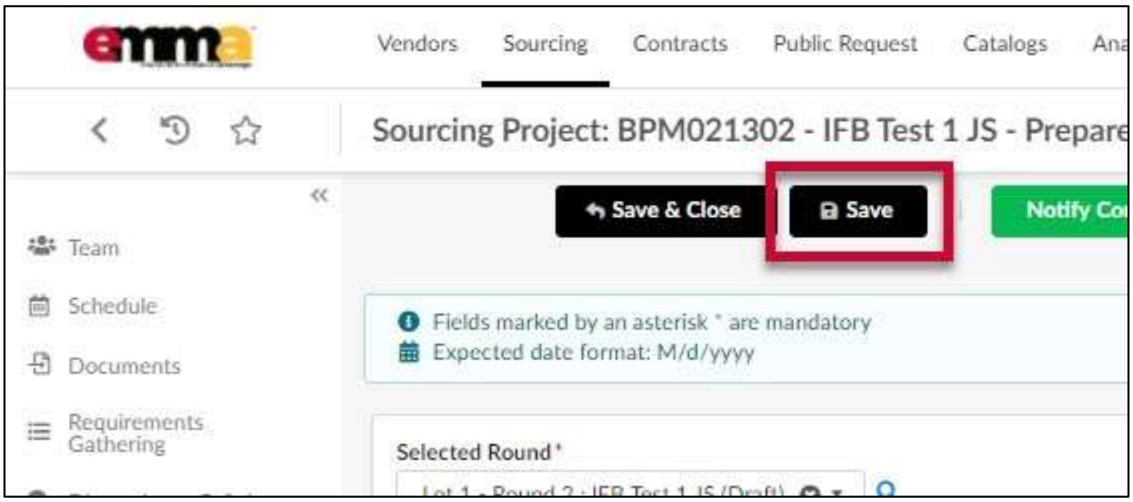


Figure 20: The Save button at the top of the page

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

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.

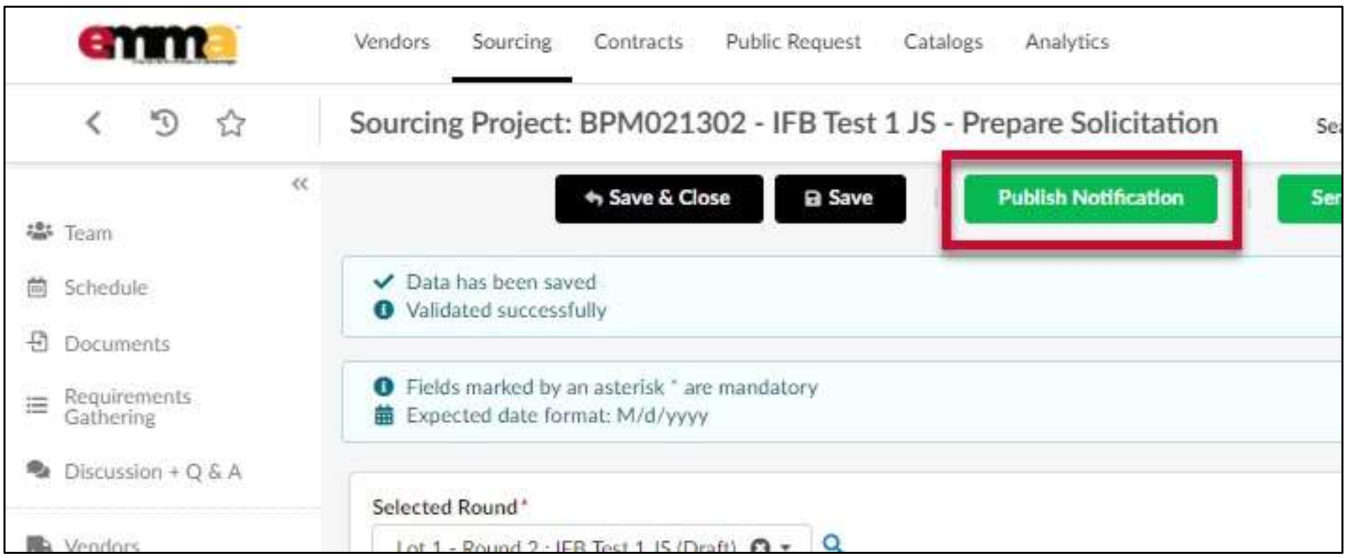


Figure 23: The Publish Notification button at the top of an Amendment.

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

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

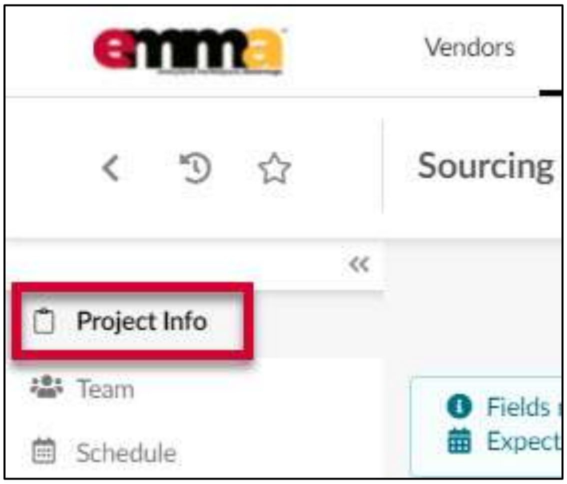


Figure 24: The Project Info tab.

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.

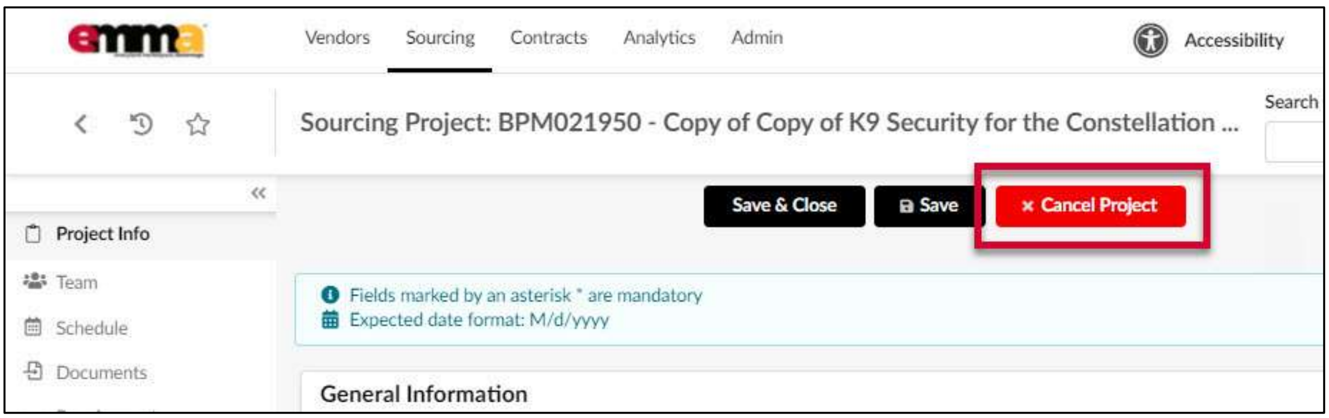


Figure 25: The Cancel Project button for a published solicitation.

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.

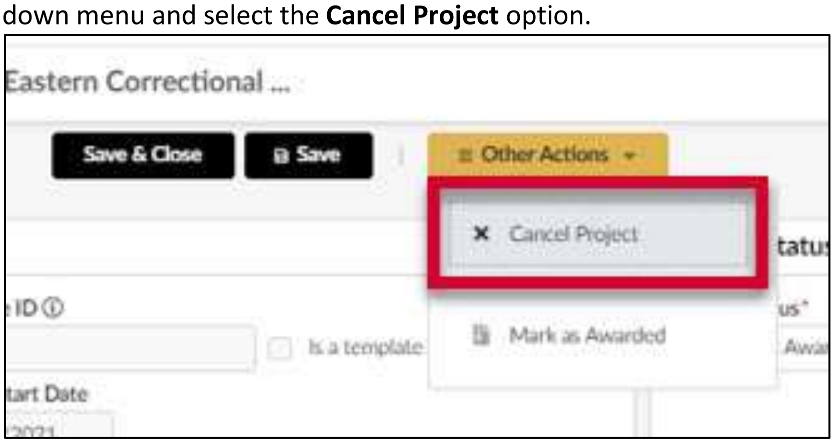


Figure 26: The Cancel Project button in the Other Actions drop-down menu.

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**.

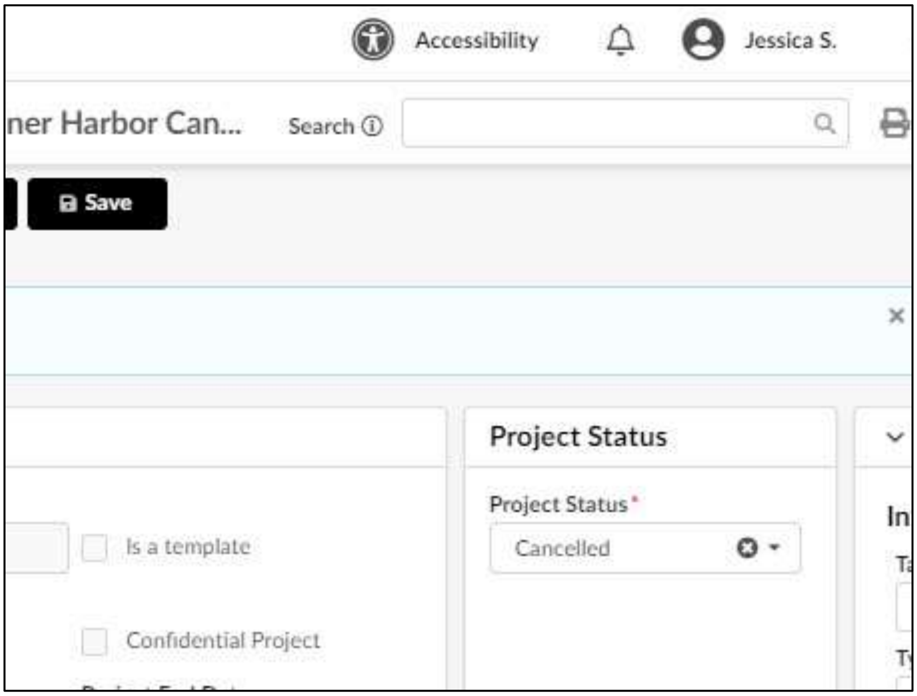


Figure 27: The Project Status in a Solicitation page shown as Cancelled.

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

Figure 28: A cancelled Solicitation in eMMA.