

Creating and Submitting a Sole Source Request Form in eMACS

The State Procurement Bureau has a new Sole Source Request form separate from the online requisition form. The new form will aid in reporting requirements and allow the creation of a contract record from an approved sole source.

Ensure that you have a **Requisitioner** role, it is required for users to submit sourcing event requests.

- 1. Access the Sole Source Request Form in eMACS by:
 - a. First, navigate to the Sole Source Request on the eMACS home page.

Shop • eMACS	Marketplace		
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	ELEASE - 2022 information		
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2. Enter a Contract Request Name (name of Sole Source. The Contract Request Template field will auto-populate. Once populated click Submit.

Create Contract	Request
Contract Request Name *	
Select a Contract Request Template *	Sole Source Procurement × Q Justification
* Required	Submit



- 3. Review the Instructions section. Any updates to the form will be posted in this section. Once you've reviewed the information, click Next.
- 4. In the Details section, edit the Contract Request Name if needed:

Details		🚔 Print Request	History ?
Contract Request Name *	test		
Template	Sole Source Procurement Justification		
Contract Type	Sole Source		
Description	This template will be used to submit a Sole Source request.		
	< Previous	ave Progress	Next >

5. Select Add Attachment, if necessary.

Examples of attachments may include additional document files to justify the sole source request.

Attachments	🖨 Print Request	History	?
Add Attachments			

- a. If adding and attachment, select Add Attachment and a new window will appear,
- b. Next click Select files.
- c. After adding the designated file, click Save Changes.

Add Attachn	nents	×
Attachment Type	● File ○ Link	
File *	Select files	Done 🥑
	Test Document for 19.3.docx	100%×
	Maximum upload file size: 50.0 MB	
★ Required	Save Change	es Close

d. After attachments have been added, either click Next to move to the next step.



ttachments		🖨 Print Req	uest History
Add Attachments			
Request Attachments			
Attachment	Size	Actions	
L Selected File	946 KB	Actions 👻	
		< Previous	Next >

6. The next step is the questions section.

NOTE: The questions section may require more characters than what is allowed. If that is the case, you may add additional documents under the Attachment section.

After completing the Questions section, click Save Progress, then Previous or Next to move forward.

In the Review and Complete section, all required fields must be completed before selecting Complete Request.

 Required fields complete 		
Section	Progress	
Instructions	No Required fields	
Details	No Required fields	
Attachments	No Required fields	
Questions	Required fields complete	

Additional Information

- A. The **Discussion** section is optional.
 - This section can be used to start a communication thread regarding information about the Sole Source Request. This section can be used to store information that only the creator of the form can see. The workflow approver can use this section to send a communication to the creator of the form, while the form is in workflow.
 - To start a communication thread, click Start New Thread.



• Enter information in the required fields, add any attachments if necessary, then select Post Message.

Post a New N	lessage	×
Subject *	Sole Source Vendor	
Message *	The current supplier performs adequately	
	4960 characters remaining	
Add Attachments	•	
* Required	Post Message	lose

• The information entered is stored in this Discussion section



B. Request Workflow

Questions with a star icon next to it requires a response or the form will not be submitted. The questions that have the star icon contains behind the scenes workflow(approvals), as listed below:

IACS C MONTANA ACQUISITION TRACTING SYSTEM				
1	2	3		
Agency Procurement Contact	Agency Director Approval	OBPP Approval	State Procurement Approval	Contracts Officer Assignment

- 1. <u>Select Agency Name</u> Form needs the approval of the Agency Procurement Officer associated with the agency name that is selected.
- 2. <u>Select agency staff approving this sole source request</u> Listed below are the response options and the approval for each selection:
 - a. <u>Agency Director Will approve Sole Source in eMACS</u> The agency director will receive an email notification that will require a login to eMACS to manually approve the sole source request.
 - b. <u>Agency has obtained director pre-approval and will upload document</u> An additional question will appear and request a file upload containing approval information from agency director. The form will then skip this workflow step.
 - c. <u>Agency has approval exception for this Sole Source Request</u> An additional question will appear to request exception details for this request. The form will then skip this step.
- 3. <u>Total Contract Value</u> If the value entered here is over your delegated authority and needs approval the form will stop here for approval.

Appropriate review and approvals are obtained once the Sole Source Request form has been submitted.

Back to My Contract Requests							
test	Contract Re	Contract Request Workflow					
Form Number: 363723 Request Status: Incomplete		Agency Procurement Contact	State Procurement Approval	Contracts Officer Assignment	<i>6</i> .		
Instructions	Submitted Future	Future	Future View approvers	Future View approvers	Finish		
Details		view approvers					
Attachments 2							
Questions 🗸							
Review and Complete							
Discussion							
Contract Request Work							
	★ Required						

• To view submitted requests, navigate to Contracts > Requests > My Contract Requests.





• My Contract Requests option will display by choosing one or all filtering options.

My Contract Reques	sts							?
✓ Filter Contract Requests Request Status ★	Approved Incomplete Rejected Returned Under Review Completed Apply						Create New Contr	act Request
Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	
test	Sole Source Procurement Justification	Tom Hastings	Approved	-	-	6/5/2019 1:08 PM	6/5/2019 10:59 AM	Actions 🔻

• The results of the search criteria will display a record of any contract request records. A New Contract Request can also be created from this page.

My Contract Reques	its							
Filter Contract Requests							Create New Contr	act Request
< > Page 1	of 2 1-10 of 12 Results						1	0 Per Page 🤻
Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	
Sole Source Renewal Process	Sole Source Procurement Justification	(admin)Tom Hastings	Completed	-	-	6/3/2019 1:59 PM	6/3/2019 1:34 PM	Actions 🔻
Updated Version	Sole Source Procurement Justification	(admin)Tom Hastings	Completed	-	-	8/8/2019 8:41 AM	8/8/2019 8:28 AM	Actions 🔻
test	Sole Source Procurement Justification	(admin)Tom Hastings	Returned	-	-	8/20/2019 6:38 AM	8/12/2019 7:23 AM	Actions 🔻
test	TestTemplate	(admin)Tom Hastings	Completed	-	-	3/5/2019 11:44 AM	3/5/2019 11:40 AM	Actions 🔻
test	Sole Source Procurement Justification	(admin)Tom Hastings	Completed	-	-	3/21/2019 2:22 PM	3/21/2019 2:15 PM	Actions 🔻
TEST	Sole Source Procurement Justification	(admin)Tom Hastings	Completed	-	-	4/15/2019 7:43 PM	4/15/2019 7:33 PM	Actions 🔻
test	Sole Source Procurement Justification	(admin)Tom Hastings	Completed	-	-	4/18/2019 12:51 PM	4/18/2019 12:47 PM	Actions 🔻